LARRY NALZARO VIA UNSPLASH

CLEAN CITIES RESEARCH

What city people think: Insights for advancing climate policies in urban regions of BC and ON

May 19, 2026

ECO INSIGHTS

EcoAnalytics

A project of MakeWay

Meeting agenda

- Welcome, project overview, timeline and phase 3 objectives (5 mins)
- Research approach
- Audience segmentation
- Key findings
- Recommendations
- Discussion

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

- Mixed-methods 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 timeline

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 (complete)
- **Phase 3: Quantitative surveys** on urban climate policies with engageable audiences in Metro Van and Capital regional District (Victoria) and Greater Toronto and Hamilton Area
- **Phase 4: Qualitative focus groups** with select survey respondents on messaging and framing in support of chosen urban climate policies (June–July 2026)
- **Knowledge mobilization:** Toolkits and training tailored for these end-users (Sept. 2026–Spring 2027)

Phase 3: Objectives

Understand:

1. Where support stands for municipal building decarbonization & climate adaptation policies?
2. How should cities talk about municipal housing decarbonization and adaptation policies?
3. Which opposition frames have traction, and which co-benefit frames resonate most?
4. Who is ready to act and support municipal climate policies, and what do they need to do so?
5. Where are the largest differences across regions and key population segments?

Phase 3: Survey instrument design

Module 1: Housing decarbonization

- Two pathways
    - A) Energy efficiency pathway
    - B) Electrification pathway
- Benefits & opposition frames

Module 2: Adaptation

- Language experiments
- Benefits & Opposition frames

Module 3: Climate & trust

- Climate vulnerability
    - A) Experience with impacts
    - B) Efficacy
- Trusted messengers

Module 4: Segmentation

- Five Canadas segmentation
- Short battery

Sampling and fielding

- **Fielding dates** March 20 – April 13, 2026
- **Geo-targeted sampling from GTHA, Metro Vancouver Area and Capital Regional District**
  - Mixed online panel recruitment with direct offline SMS
  - GTHA (n=1,500)
  - MVA (n=1,064)
  - CRD (n=452)
- **Weighted to regional-level Census population characteristics**
  - Age, gender and education

What we found

1. Support exists for municipal climate action, but it is conditional
2. Affordability is the dominant political filter, even among highly supportive audiences
3. Electrification is harder to sell than efficiency (BC)
4. Climate language itself is not toxic, but it can polarize at the extremes
5. Adaptation is better communicated in terms of preparing and protecting
6. Middle audiences are practical, not ideological
7. Trust and messenger choice matter a great deal
8. Residents want reassurance about implementation, not necessarily climate action

Audiences

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What is audience segmentation?

- Values-based segmentation groups people according to shared worldviews, social values, and political attitudes - not just demographics like age or income.

- People respond to information, policies, risks, and tradeoffs in different but predictable ways.
  - Some are motivated by justice and collective action, others by community and stability, others by freedom and autonomy.

- Segmentation helps communicators understand these differences so they can:
  - Understand what motivates different groups;
  - Anticipate public reactions, information needs, and susceptibility to misinformation;
  - Avoid one-size-fits all communication;
  - Design more effective engagement strategies;
  - Reduce resistance by connecting to people's existing values and priorities;
  - Build coalitions of support.

Segmentation criteria

- Climate beliefs
- Emotion
- Identity
- Political and social values

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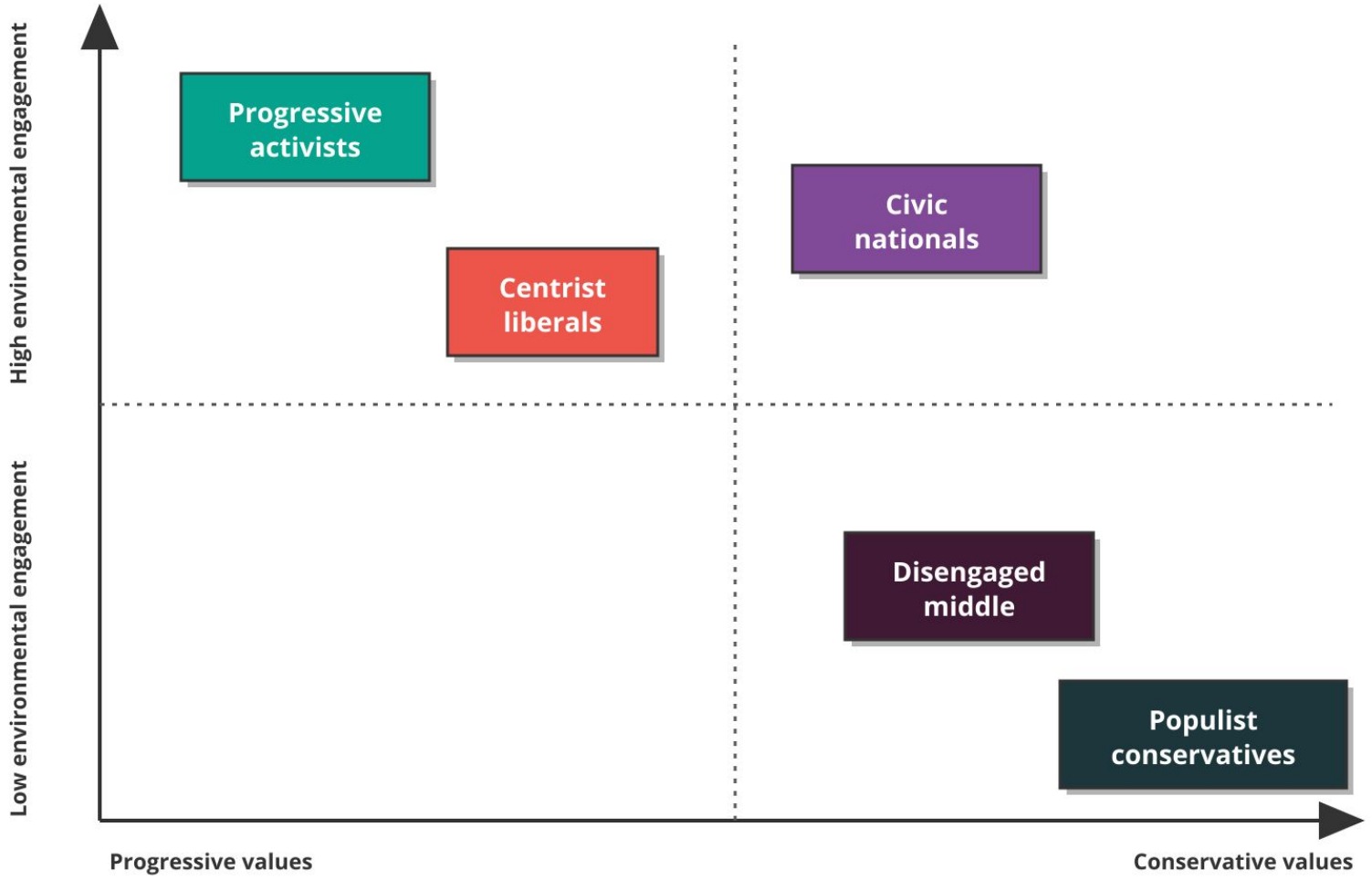
Political and environmental values



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Five Canadas of urban BC & ON

Ranked by level of engagement on climate change, high to low

British Columbia


Progressive activists 24%


Civic nationals 13%


Centrist liberals 21%


Disengaged middle 32%


Populist conservatives 10%

Ontario


Progressive activists 20%


Civic nationals 13%


Centrist liberals 21%


Disengaged middle 36%


Populist conservatives 10%

Percentages indicate proportion of respondents in each segment

Housing decarbonization

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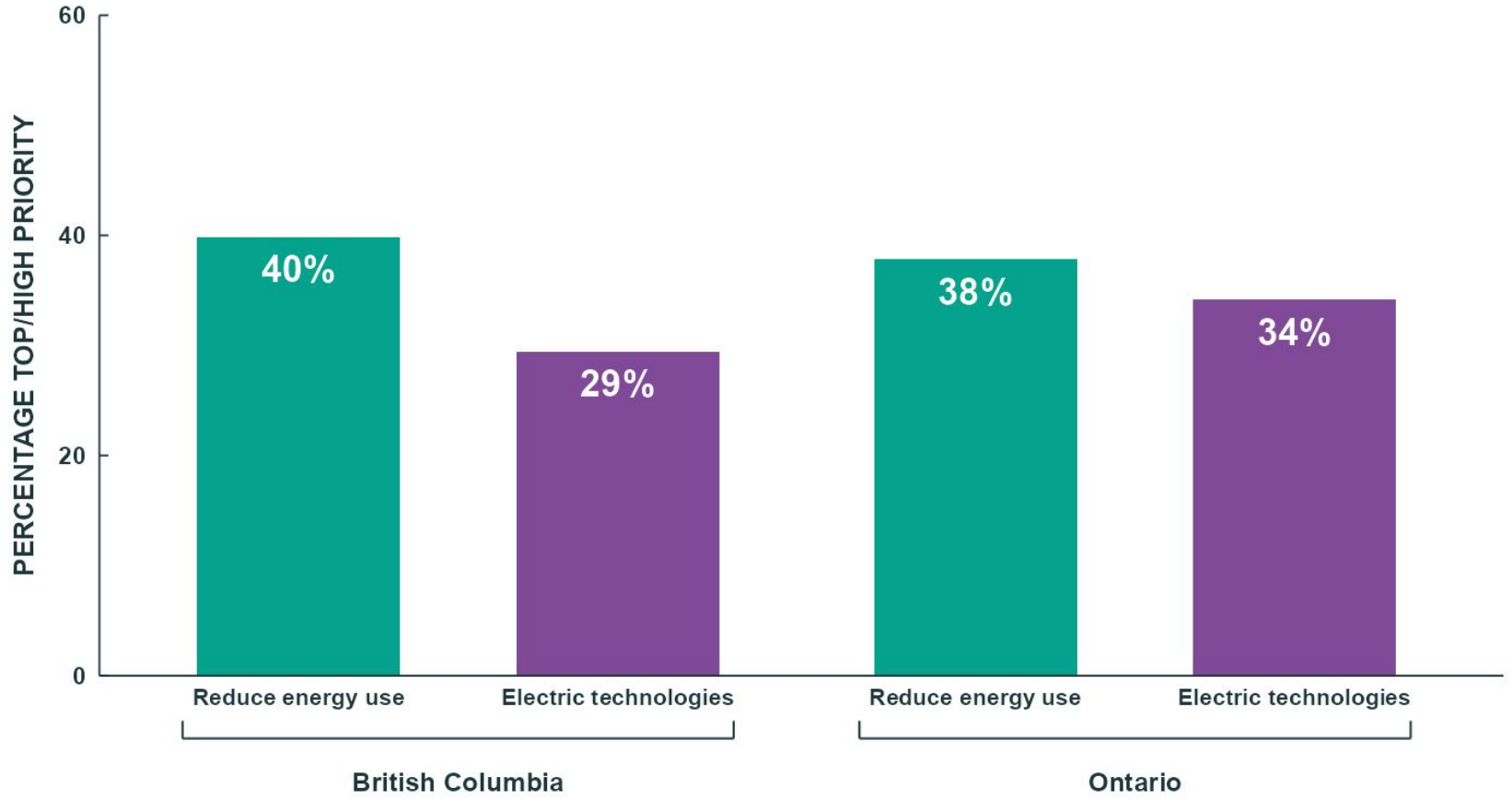
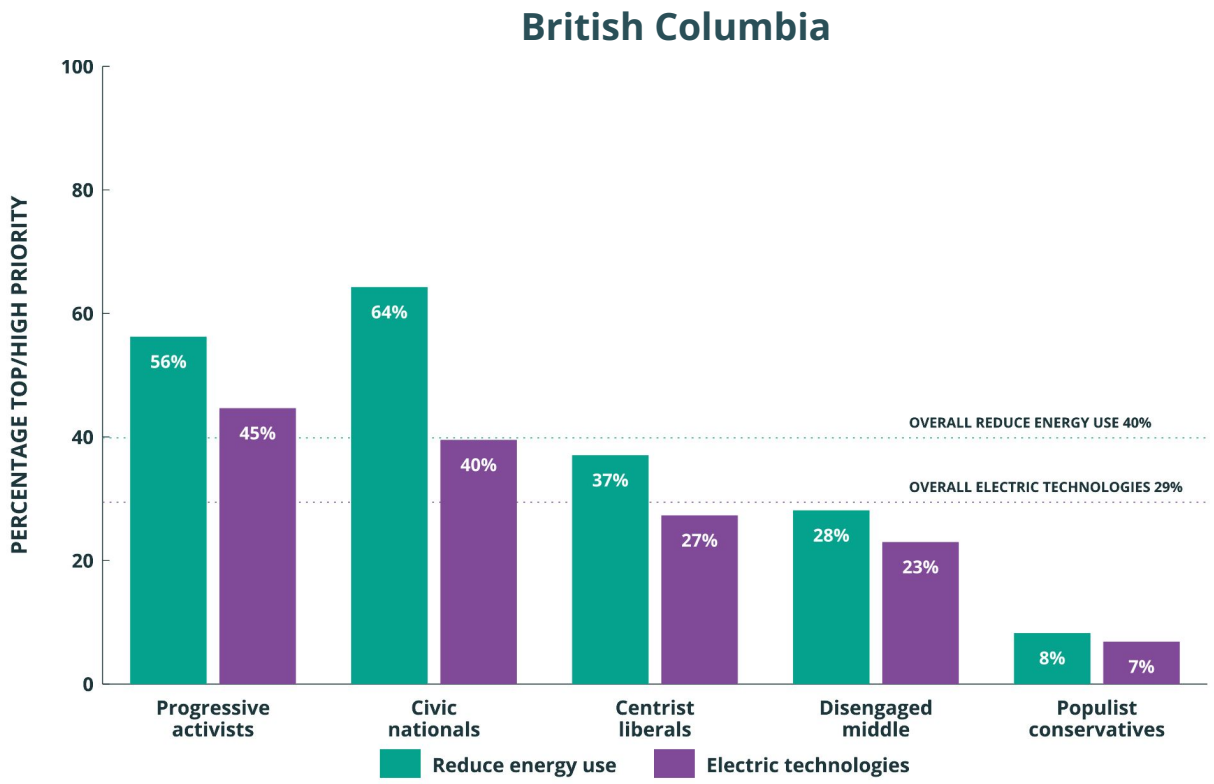
Support for electrification is lower in BC

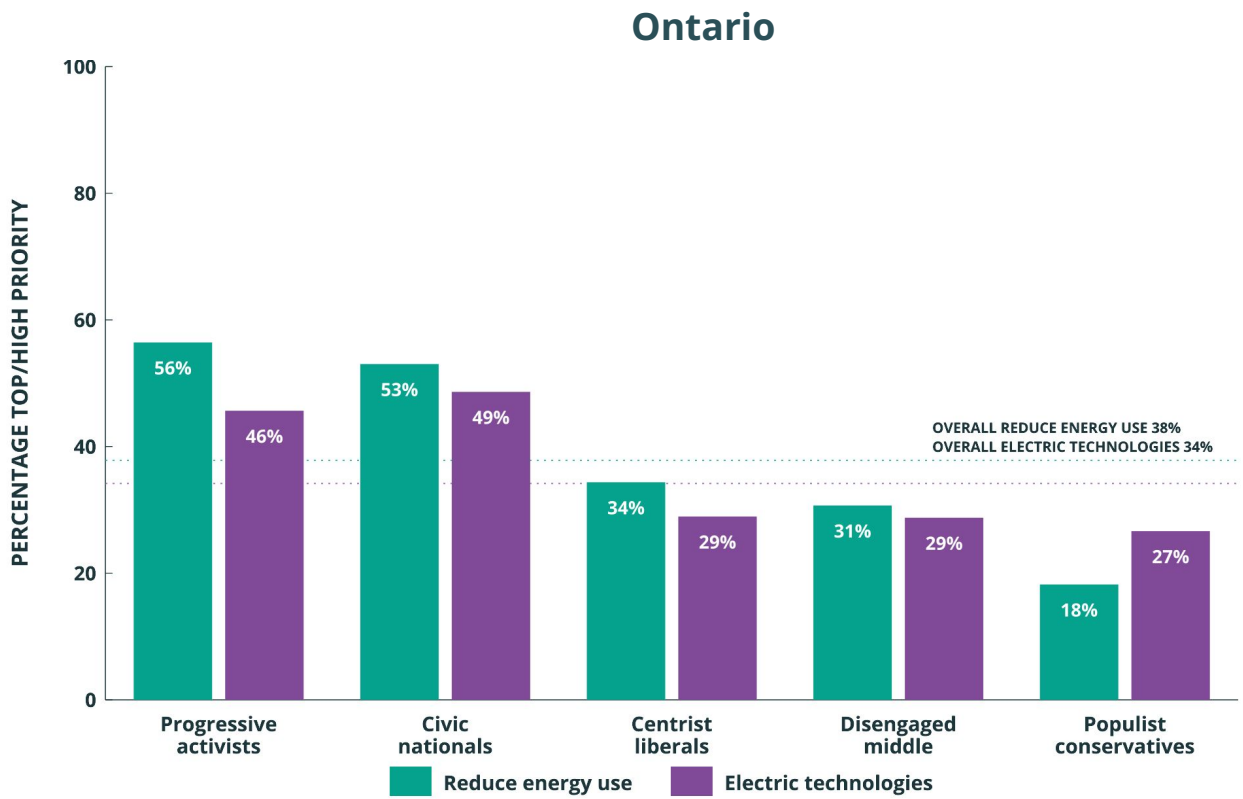
Imagine your municipality is considering programs to … *reduce energy use / promote electric technologies.* How much of a priority should this be for your city?



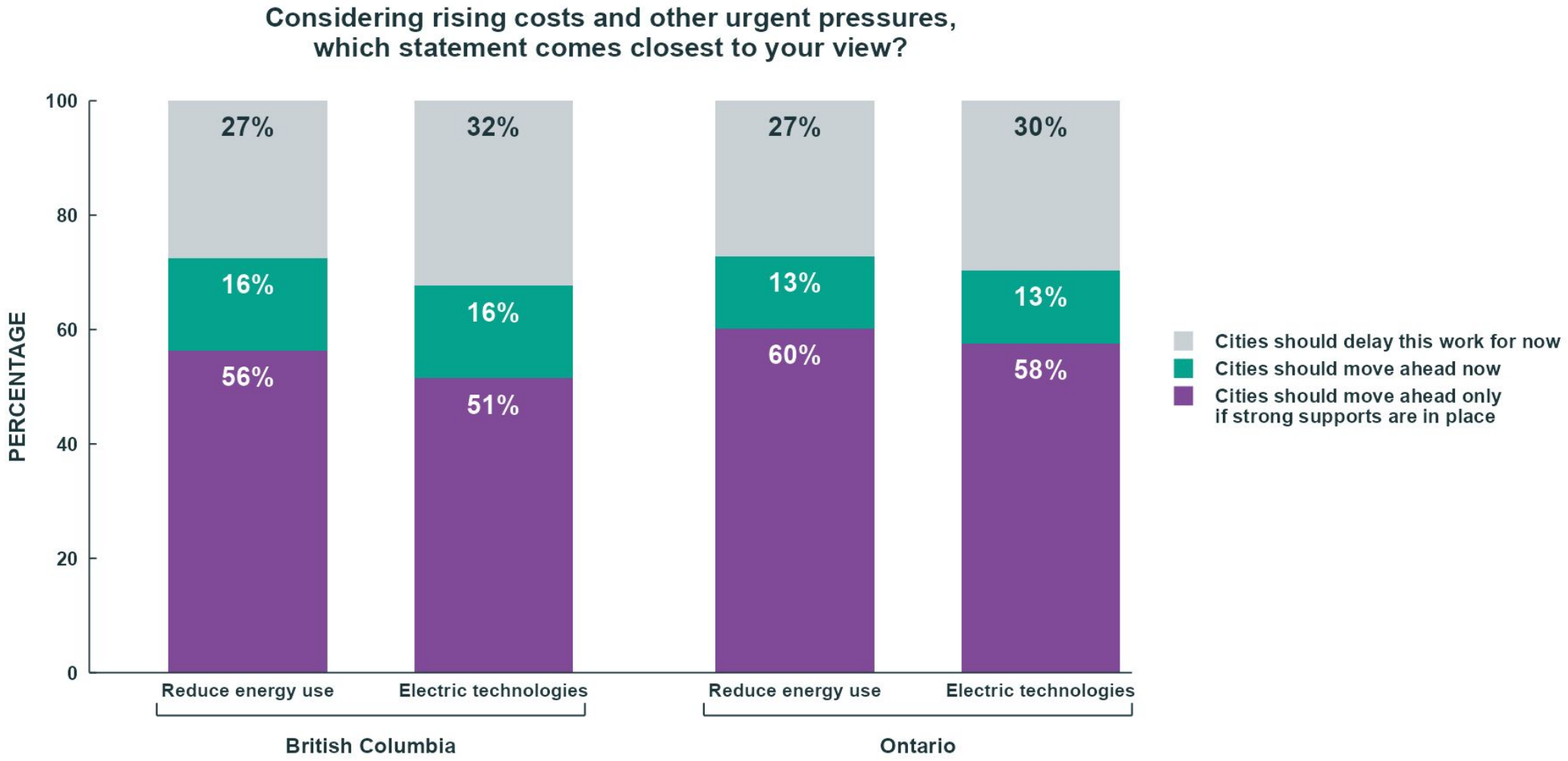
Support for upgrading homes and buildings varies across groups

Imagine your municipality is considering programs to … *reduce energy use / promote electric technologies.* How much of a priority should this be for your city?

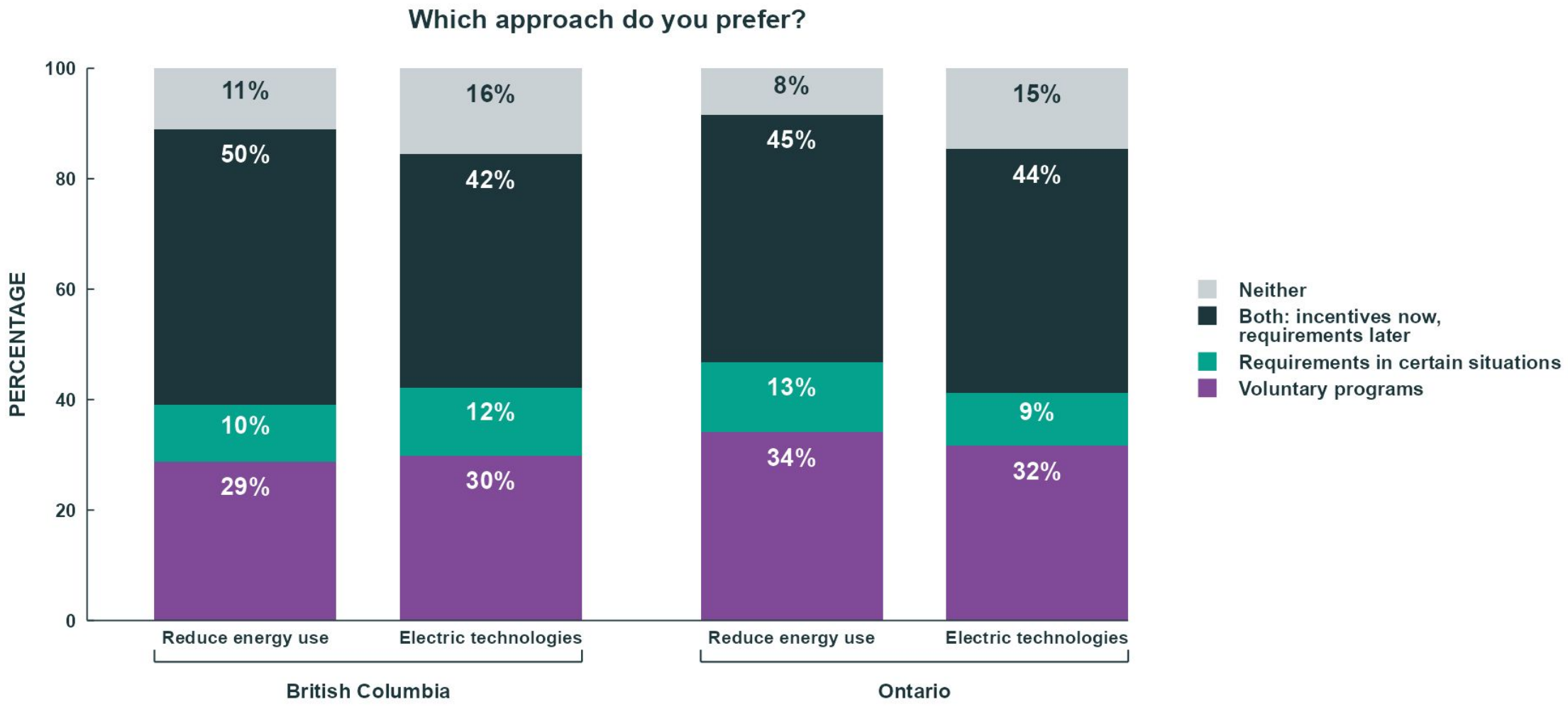




Support for housing decarbonization is conditional



Incentives now, requirements later

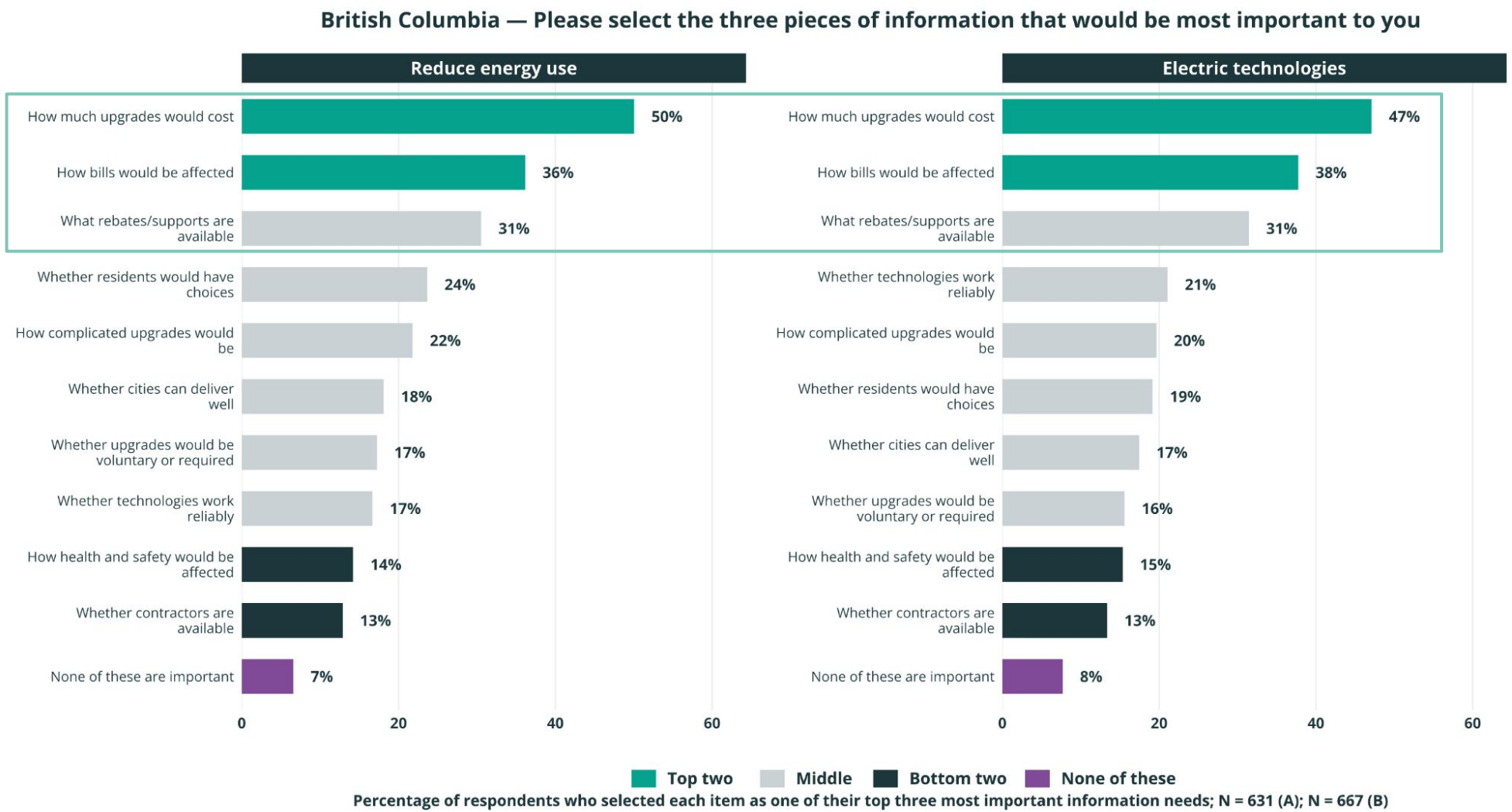


What do residents want to know?

Below are some types of information people may want to know when forming an opinion about programs to support upgrading homes and buildings [to reduce energy use / with electric technologies such as heat pumps].

- **Cost**: How much the upgrades would cost property owners and renters upfront
- **Affordability**: How the upgrades would affect monthly household energy bills over time
- **Rebates**: Whether rebates and technical supports are available to help residents complete upgrades
- **Reliability**: Whether the technologies work reliability across different weather conditions
- **Hassle**: How simple or complicated the upgrade process would be
- **Choice**: Whether residents have choices in how they upgrade their homes
- **Design**: Whether upgrades would be voluntary or required in certain situations
- **Health**: How these upgrades affect residents' health and safety
- **Feasibility**: Whether there are enough qualified contractors to do this work well
- **Trust**: Whether cities can deliver these programs fairly, on time, and on budget

How much will this cost?

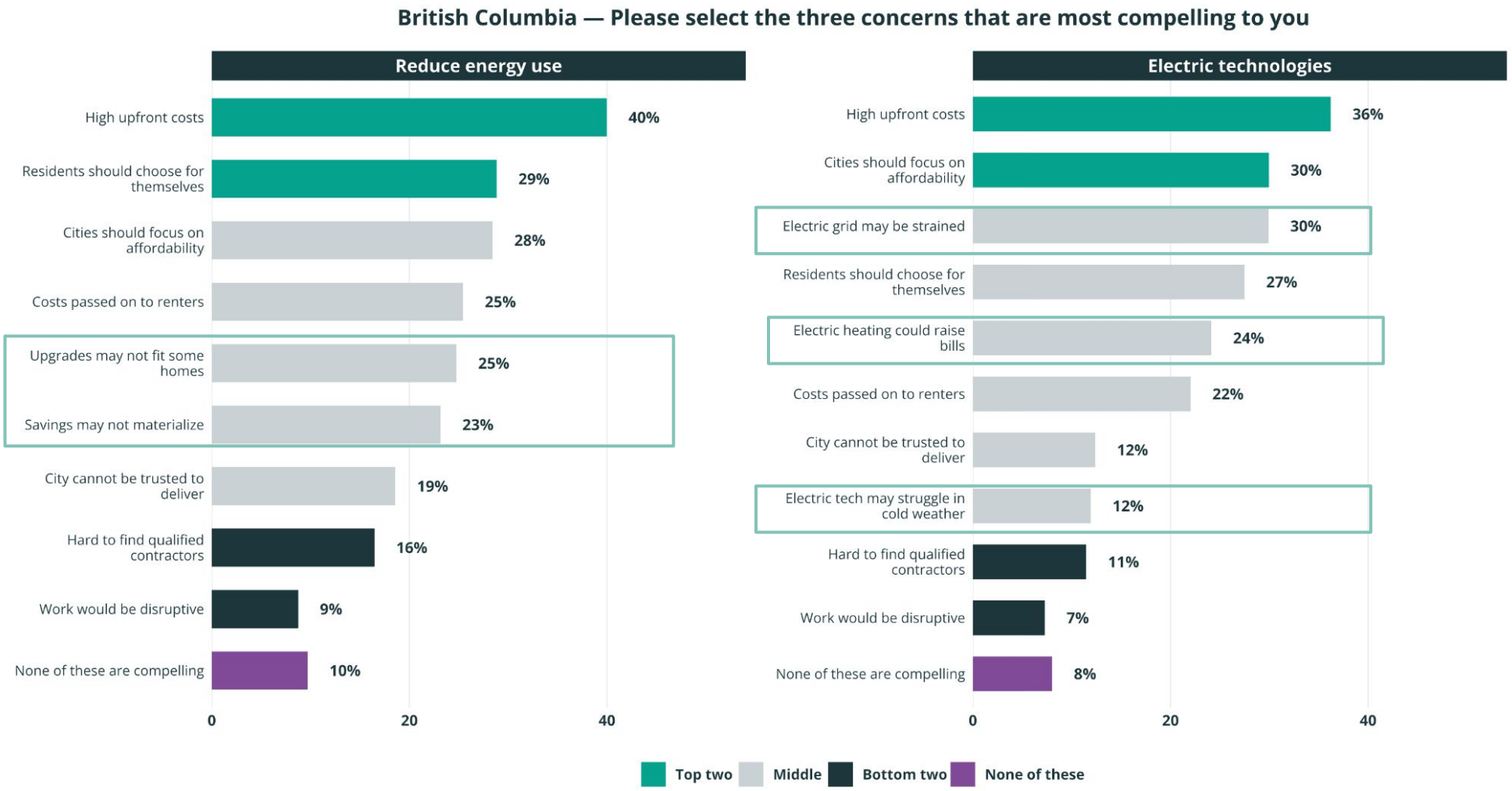


Percentage of respondents who selected each item as one of their top three most important information needs; N = 631 (A); N = 667 (B)

Which opposition frames have traction?

Shared counter frames tested in both conditions		Energy efficiency-specific concerns		Electrification-specific concerns	
Cost	Requires high upfront costs, even with rebates	**Effectiveness**	Efficiency upgrades don't always deliver the savings or benefits they promise	**Reliability**	Relies on electric technologies that may be unreliable or not work in extreme cold
Equity	Costs would be passed on to renters through higher rents	**Reliability**	Some upgrades may not work well in certain homes or conditions	**Grid**	Greater reliance on the electricity system (the power grid) could create reliability risks during extreme weather or power outages
Affordability	Cities should focus on more immediate affordability pressures instead			**Affordability**	Switching to electric heating could lead to higher monthly energy costs
Trust	Cities cannot be trusted to manage these programs effectively				
Choice	Decisions about home upgrades should be left to home/property owners, not directed by the city				
Disruption	The work involved would be too disruptive and inconvenient				
Capacity	It's hard to find qualified contractors, and quality varies				

Affordability dominates concern



Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 631 (A); N = 667 (B)

Which co-benefits resonate most?

You will now see some possible benefits of upgrading homes and buildings [...to reduce energy use for heating and cooling / ...with electric technologies such as heat pumps]. On each screen, please select the item that you find MOST compelling and which you find LEAST compelling.

- **Cost:** Keeps household energy costs more stable over time
- **Predictability:** Reduces exposure to future increases in energy prices
- **Value:** Maintains the long-term value of homes and buildings
- **Modernization:** Replaces aging systems before they fail
- **Safety:** Protects residents during extreme heat, cold, or power outages
- **Comfort:** Improves comfort in homes and buildings year-round
- **Health:** Improves indoor air quality in homes and buildings
- **Climate:** Reduces greenhouse gas emissions that contribute to climate change
- **Control:** Gives residents more control over how energy is used in their homes
- **Jobs:** Helps support local jobs and economic activity

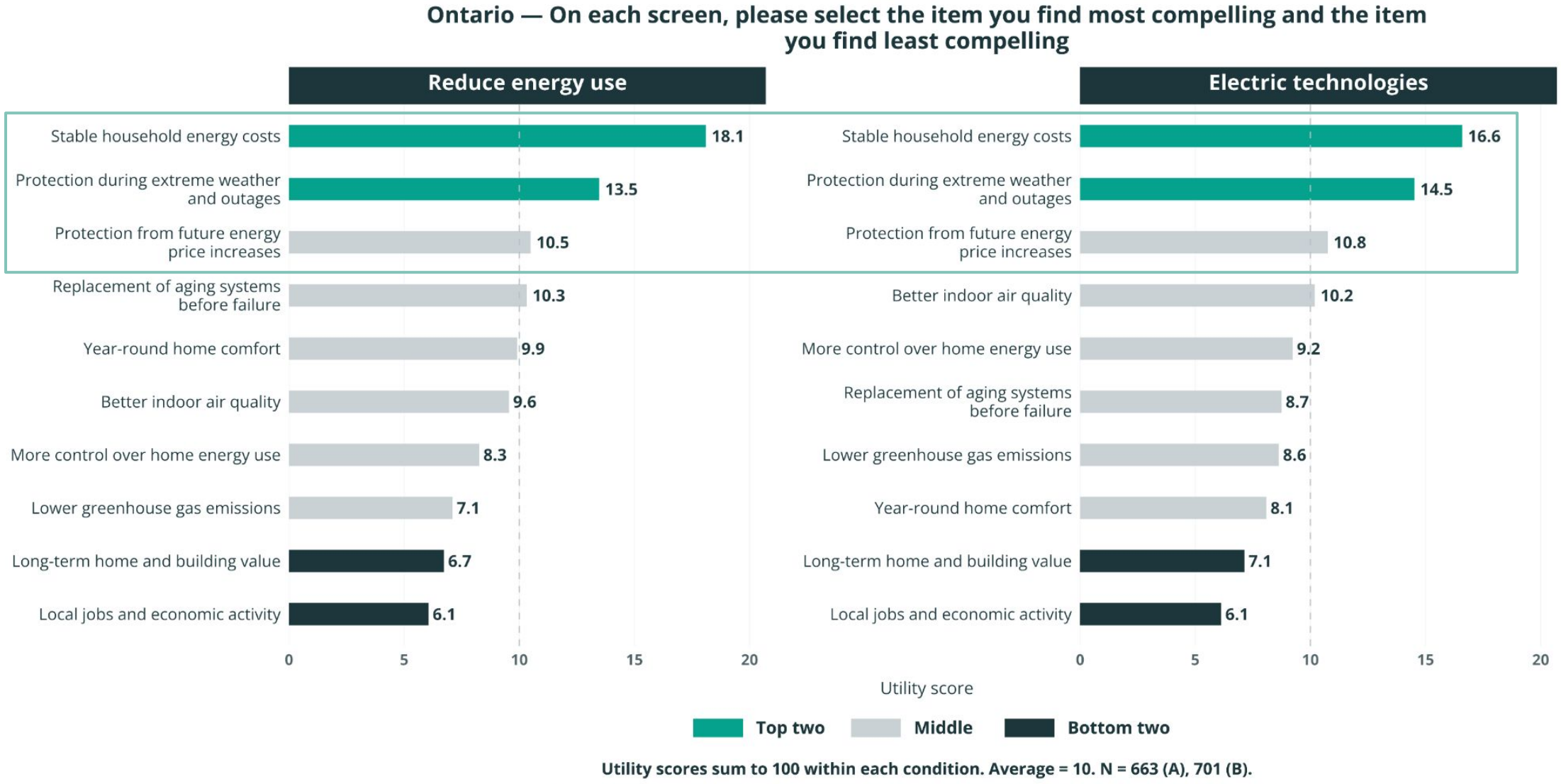
How to read the MaxDiff scores

- Respondents shown small sets of benefit statements and asked to choose the most and least compelling in each set.
  - Forces trade-offs and shows which benefits are strongest relative to the others tested.

- Results are reported as utility scores, which add up to 100 across the benefits tests, with an average score of 100/number of attributes.
  - E.g. In a MaxDiff with 10 attributes, the average score is 10. Scores above 10 are more compelling than average, and scores below 10 are less compelling.

- A benefit with a score of 15 can be read as roughly twice as compelling as one with a score of 7.5.

Protection and price stability



Housing highlights

- Costs, affordability and stability dominate across information needs, concerns, and co-benefits.
  - Choice/autonomy is also a concern.

- Electrification is a tougher political sell, especially in BC, and raises concerns beyond cost (reliability).

- Practical benefits outperform diffuse benefits (e.g. jobs, climate).

- Overall:
  - There is space for municipal action, but support is conditional.
  - Residents want reassurance about costs and implementation.
  - Middle audiences are open and pragmatic, not ideologically opposed.

Questions?

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Adaptation & Preparedness

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Adaptation experiments

1. Does framing adaptation policy using a climate change vs. extreme weather lens affect support for municipal adaptation investments?

2. Should cities use language around helping their communities adapt to, prepare for, or build resilience?

3. Should cities justify the costs of climate change adaptation in terms of protection or avoided future costs?

Dependent variables:

- How much of a priority should adaptation investment be (high/top)?
- Which comes closest to your view: Invest now vs. focus on more immediate affordability concerns?

Climate language mobilizes, and polarizes, in BC

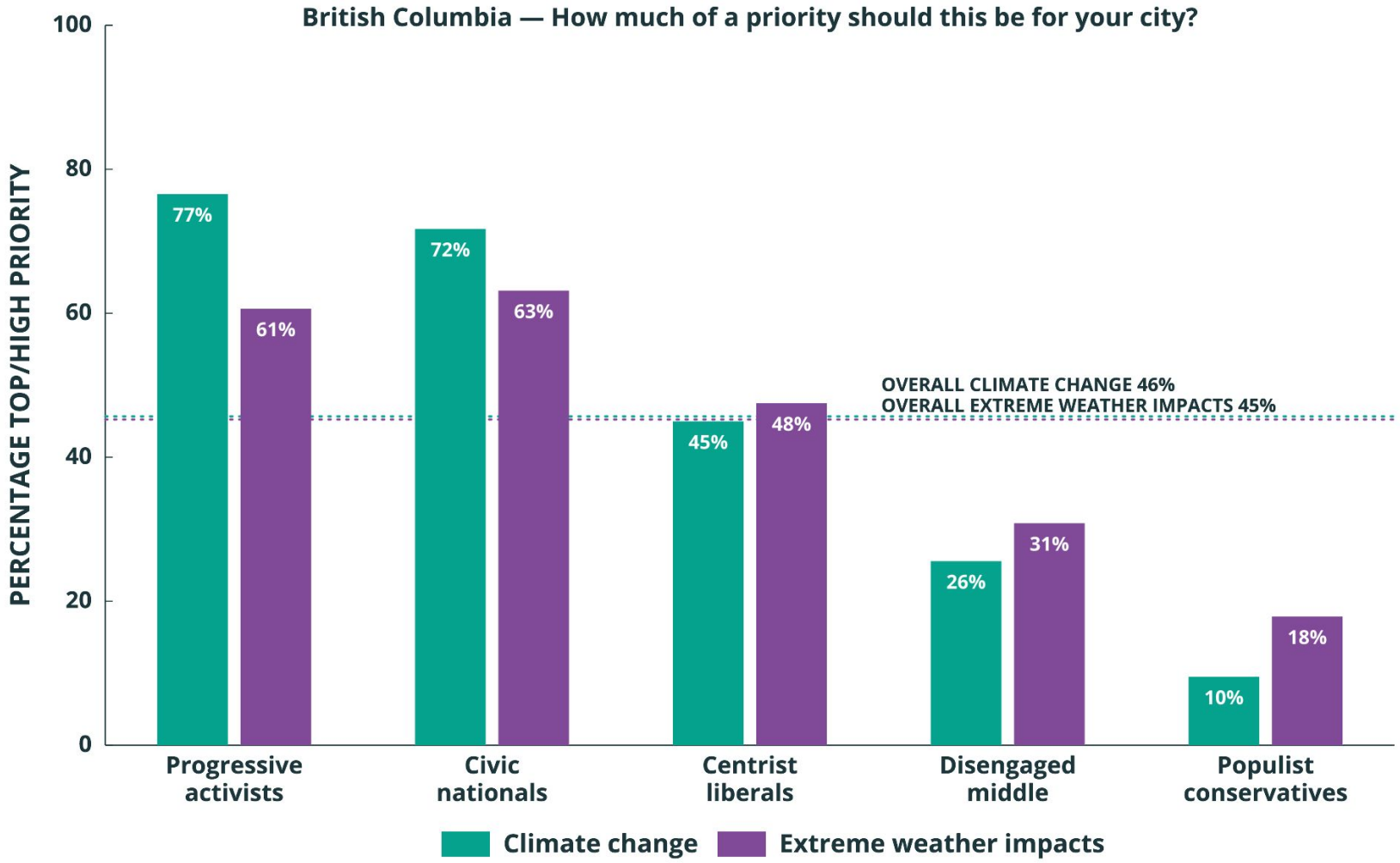
Scientists say ***climate change / extreme weather*** is driving up infrastructure, insurance, and repair costs for communities across Canada.

In response, some local governments are investing in new measures to reduce future costs and disruptions, for example...

How much of a priority should this plan to

[*...help your community **adapt** to /*
*...increase your community's **resilience** to /*
*...better **prepare** your community for]*

[climate change / extreme weather] impacts be for your city?



Climate language mobilizes, and polarizes, in ON

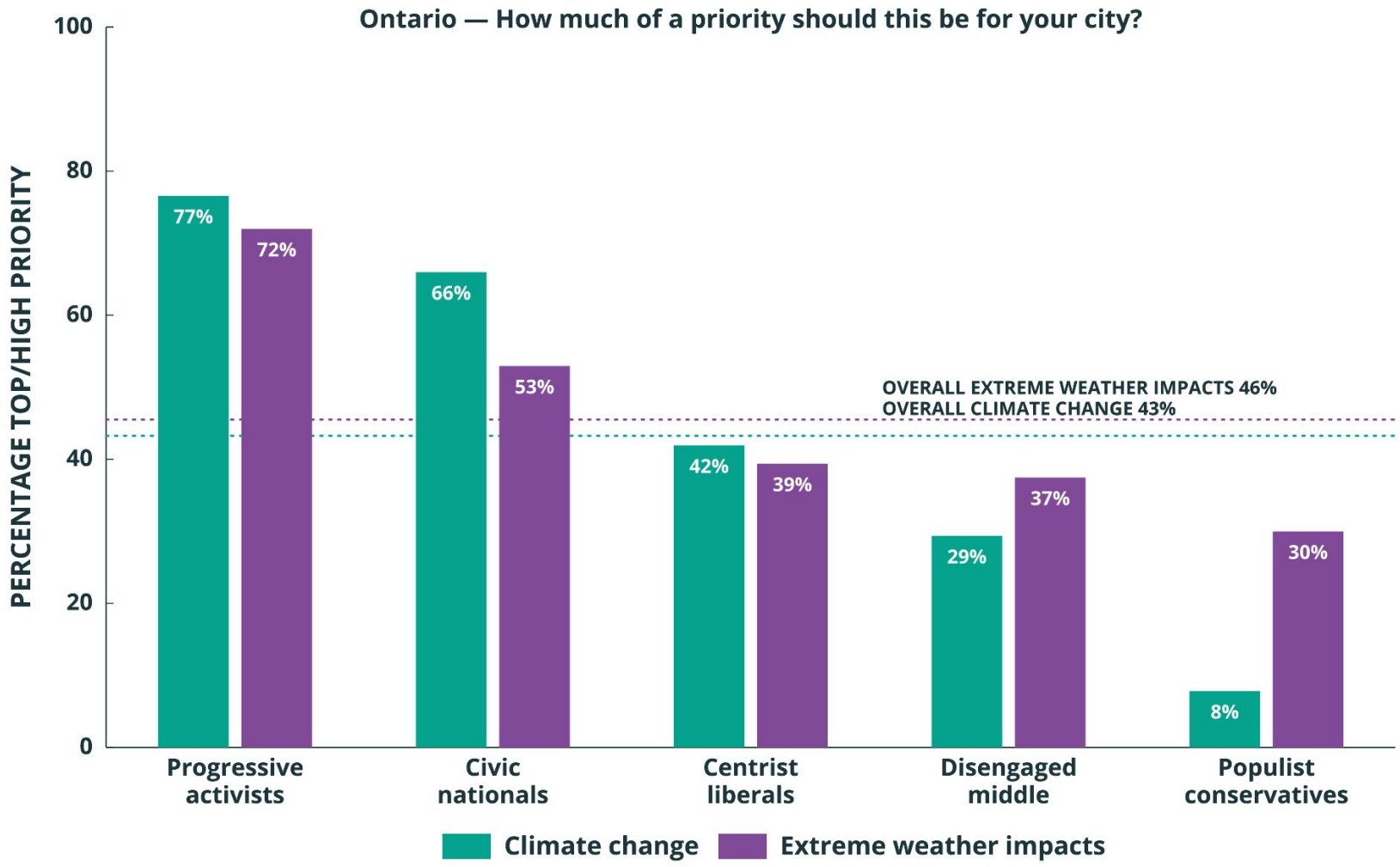
Scientists say ***climate change / extreme weather*** is driving up infrastructure, insurance, and repair costs for communities across Canada.

In response, some local governments are investing in new measures to reduce future costs and disruptions, for example...

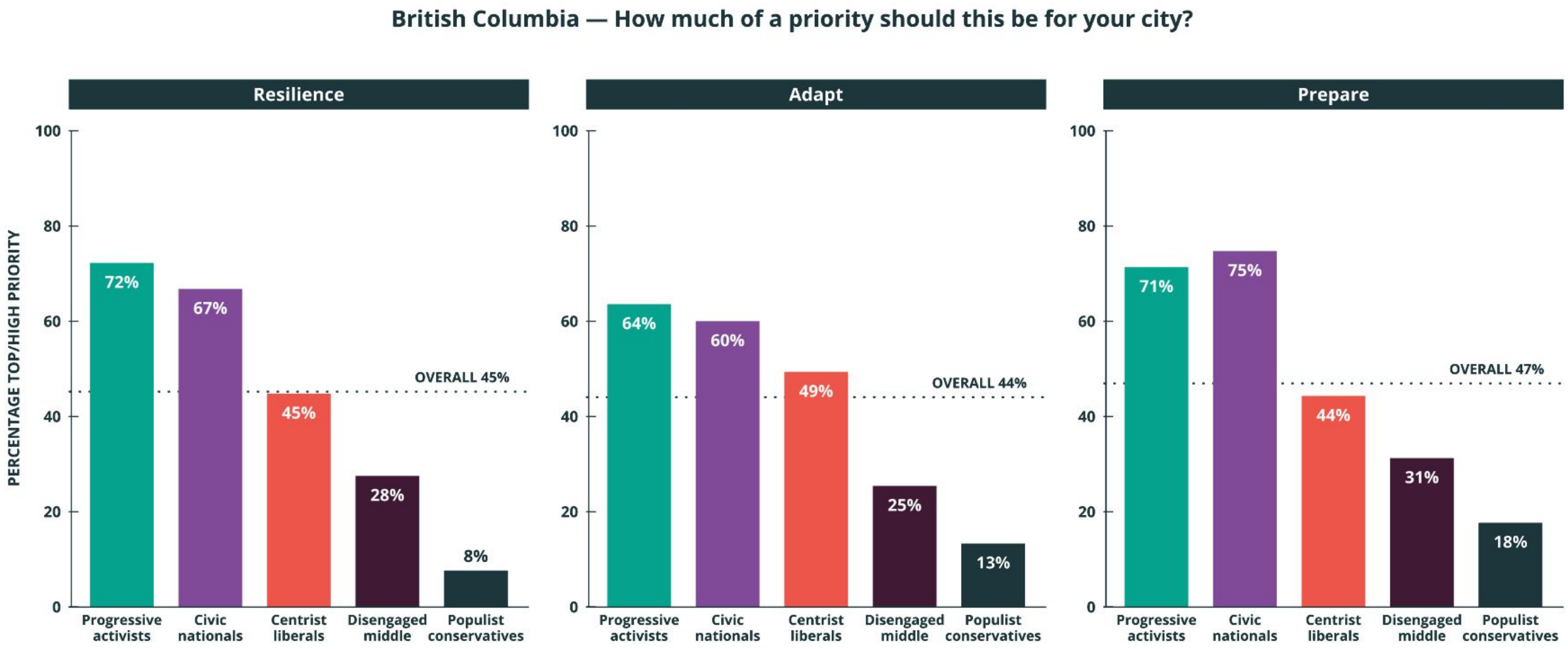
How much of a priority should this plan to

[*...help your community **adapt** to /*
*...increase your community's **resilience** to /*
*...better **prepare** your community for]*

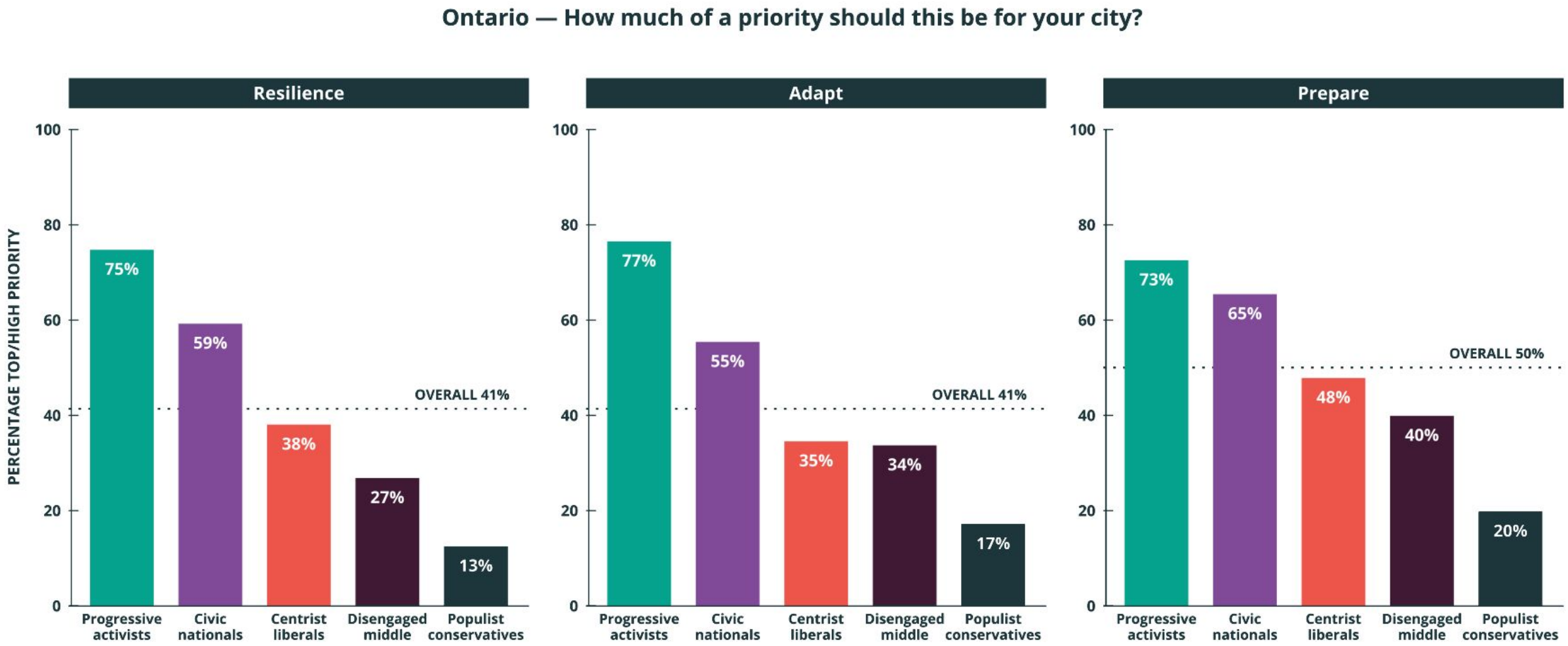
[climate change / extreme weather] impacts be for your city?



Prepare outperforms *resilience* for some audiences in BC



Prepare outperforms *resilience* AND *adapt* for most audiences in ON



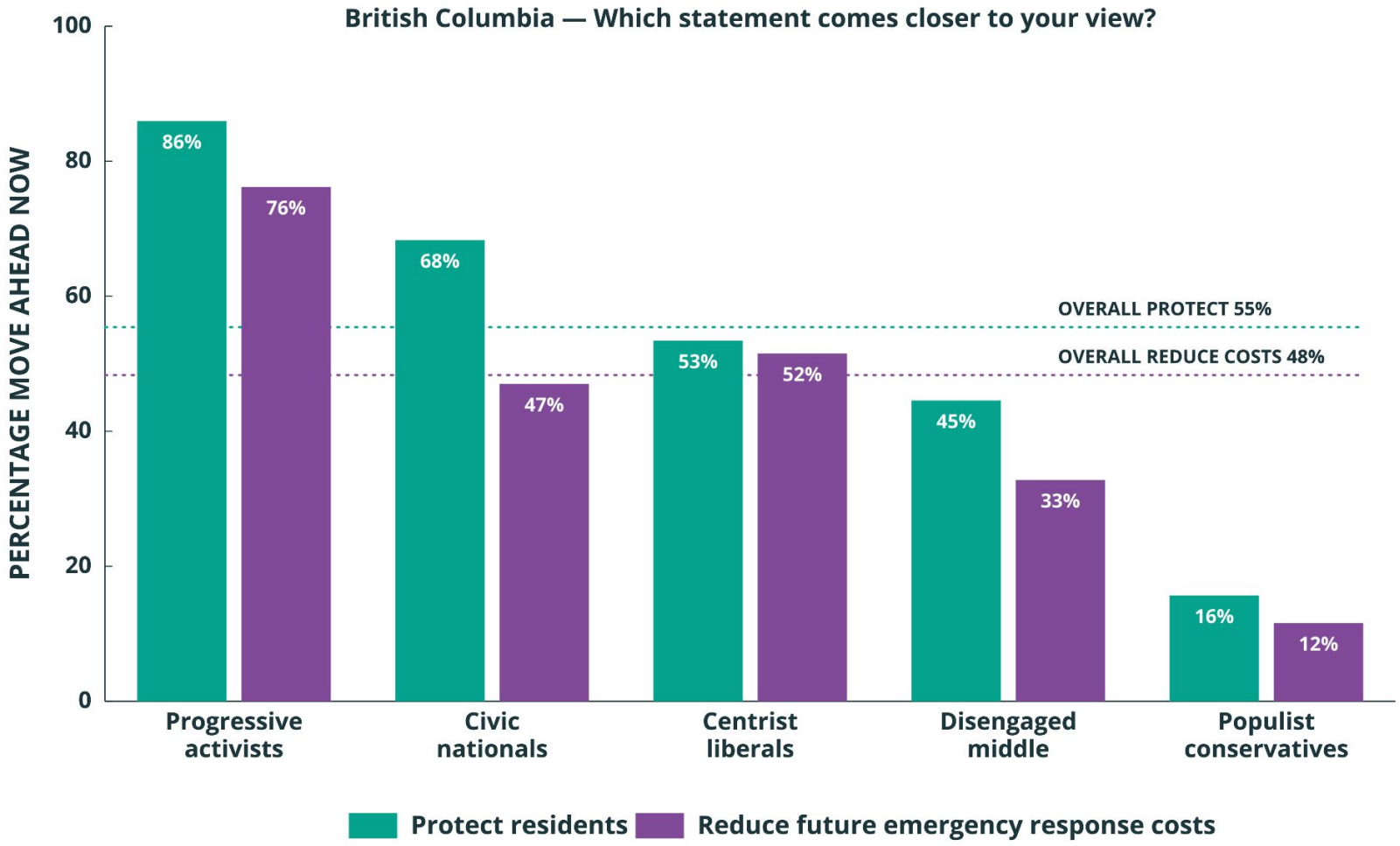
Protection outperforms future costs in BC

Now imagine your municipality is considering a plan to invest in measures to protect residents... Which statement comes closer to your view?

Even with today's cost pressures, cities should move ahead with these investments now

*[to **protect residents** from flooding, extreme heat, wildfire smoke and water shortages / to **reduce future emergency response costs**, insurance losses, and infrastructure repair costs]*

Because of rising costs and other urgent priorities, cities should delay these investments for now and focus instead on more immediate affordability and service needs.



Future costs as convincing as protection in ON

Now imagine your municipality is considering a plan to invest in measures to protect residents... Which statement comes closer to your view?

Even with today's cost pressures, cities should move ahead with these investments now

*[to **protect residents** from flooding, extreme heat, wildfire smoke and water shortages / to **reduce future emergency response costs**, insurance losses, and infrastructure repair costs]*

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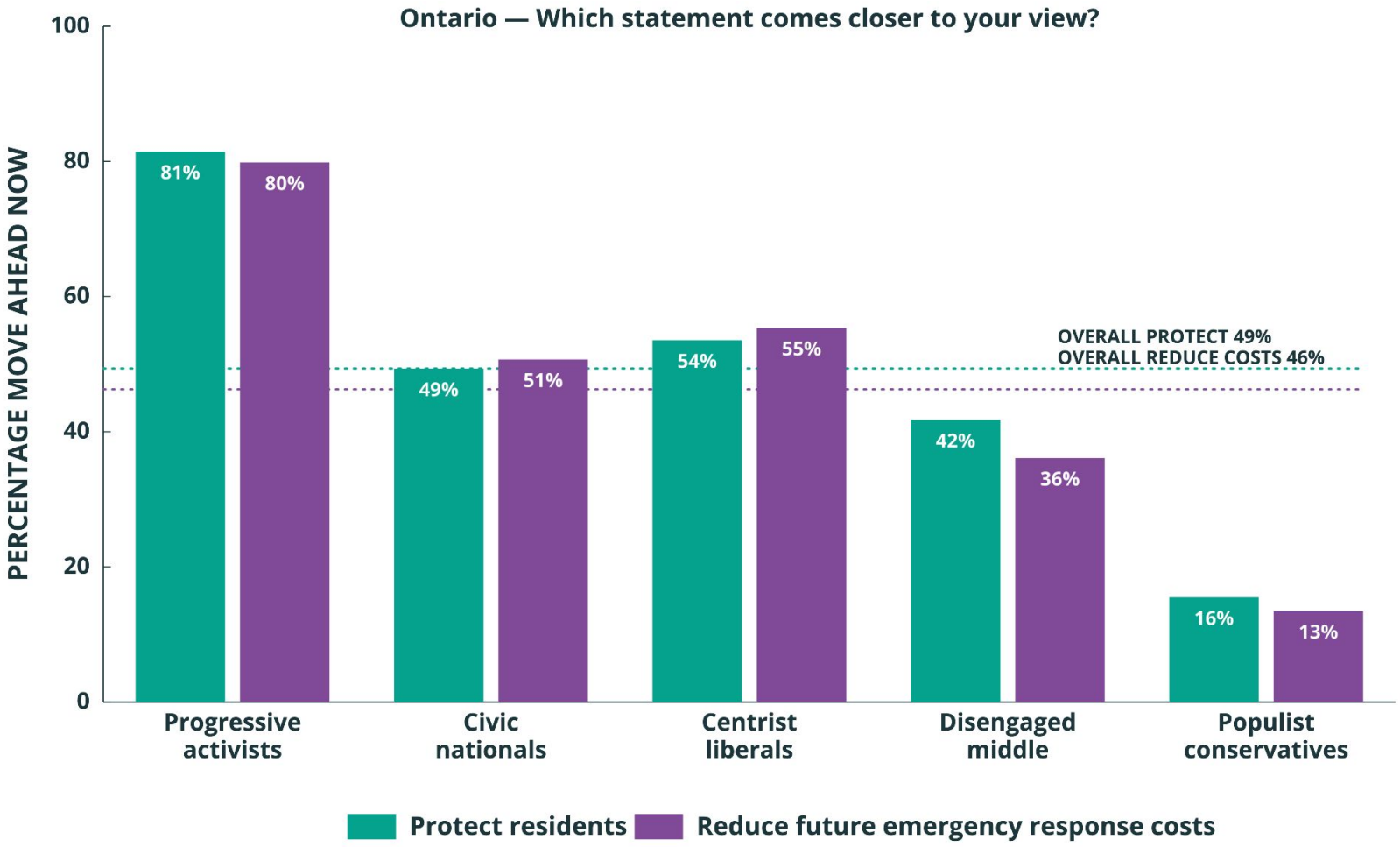
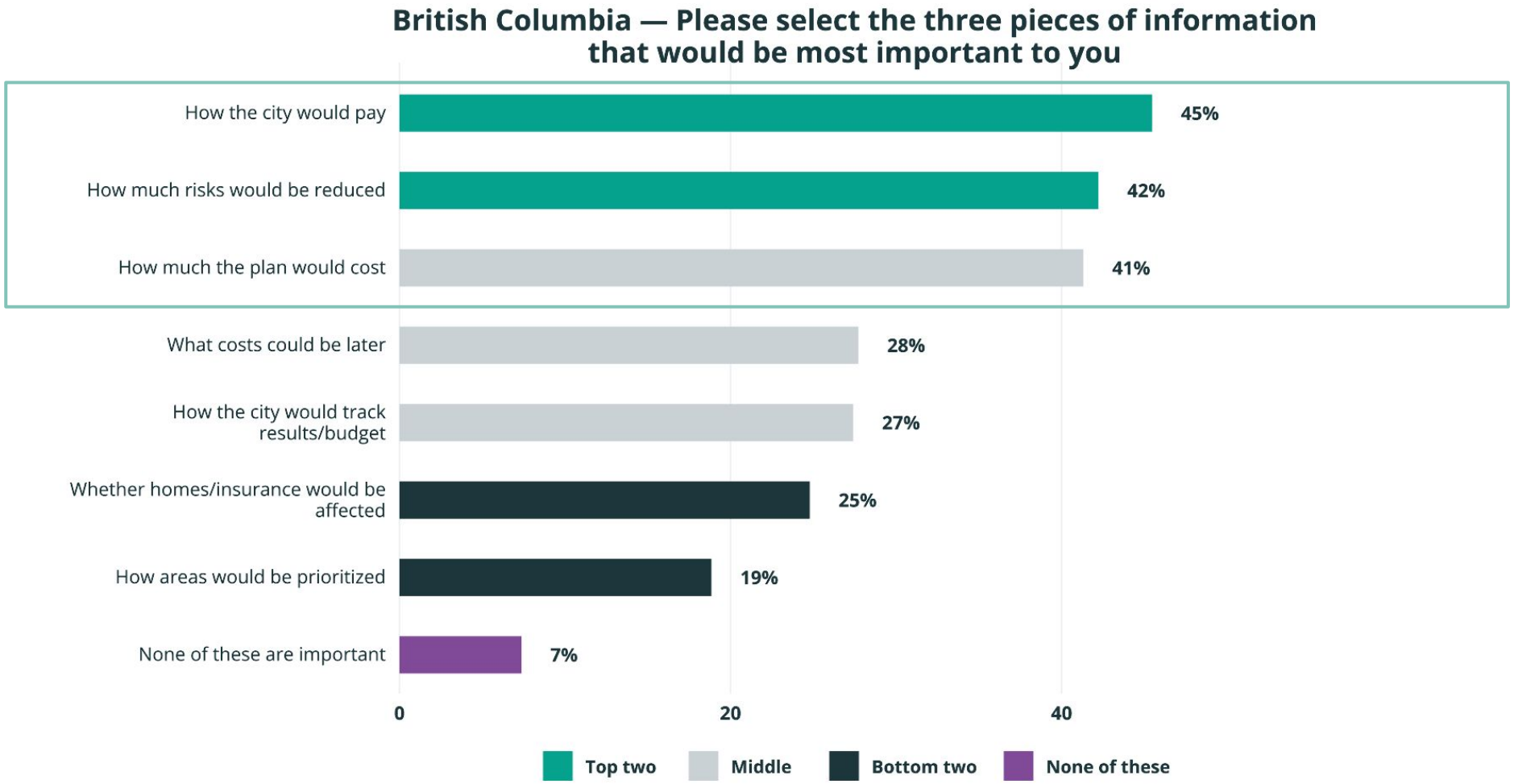


What do residents want to know?

Below are some types of information people may want to know when forming an opinion about programs to prepare the community for more frequent and severe extreme weather. Please select the three pieces of information that would be most important to you.

- **Cost:** How much the proposed plan would cost overall
- **Affordability:** Whether the plan would affect property values or home insurance costs
- **Incidence:** How the municipality plans to pay for these investments
- **Effectiveness:** How much these measures would actually reduce risks to people, homes, and local infrastructure
- **Cost of inaction:** What the long-term costs would be if the city does not invest now
- **Equity:** How decisions will be made about which areas receive investments first
- **Accountability:** How the city will track results and ensure projects stay on budget and on schedule

Cost, effectiveness & financing



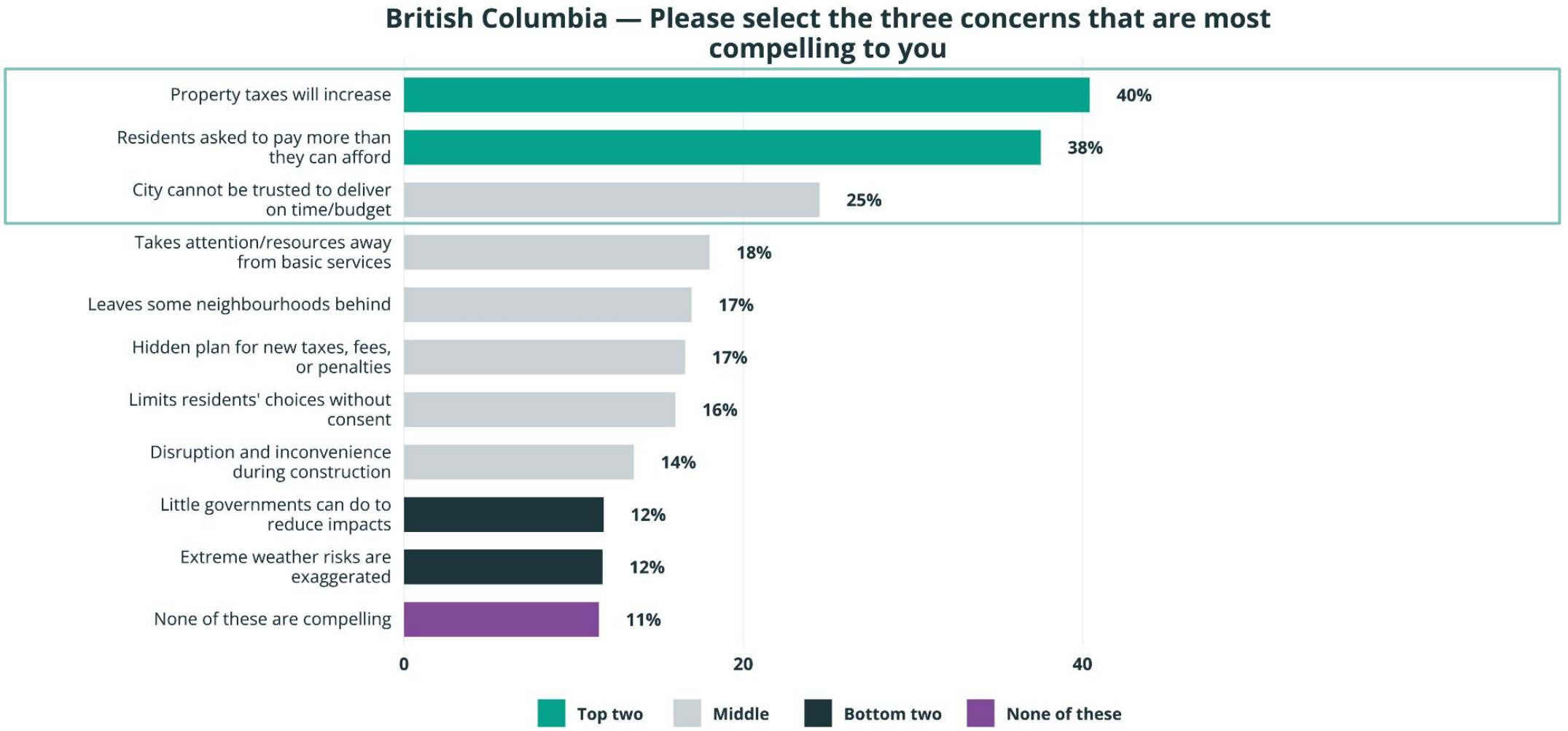
Percentage of respondents who selected each item as one of their top three most important information needs; N = 1298

Which opposition frames have traction?

Below are some concerns people sometimes raise about plans to prepare communities for more frequent and severe extreme weather. Please select the three that are MOST compelling to you.

- **Cost**: Property taxes will increase as a result
- **Affordability**: Residents will be asked to pay more than they can afford
- **Equity**: Leaves some neighbourhoods behind while others benefit
- **Choice**: Limits residents' choices by forcing changes or reallocating resources without residents' consent
- **Capacity**: Takes attention and resources away from basic services
- **Trust_comp**: The city cannot be trusted to deliver these projects on time or on budget
- **Trust_motive**: Is part of a hidden plan to impose new taxes, fees, or penalties
- **Disruption**: Causes major disruption and inconvenience for residents during construction
- **Skepticism**: Exaggerates extreme weather risks to justify new spending or regulations
- **Fatalism**: There is little governments can do to meaningfully reduce the impacts of extreme weather

Cost, affordability & competence



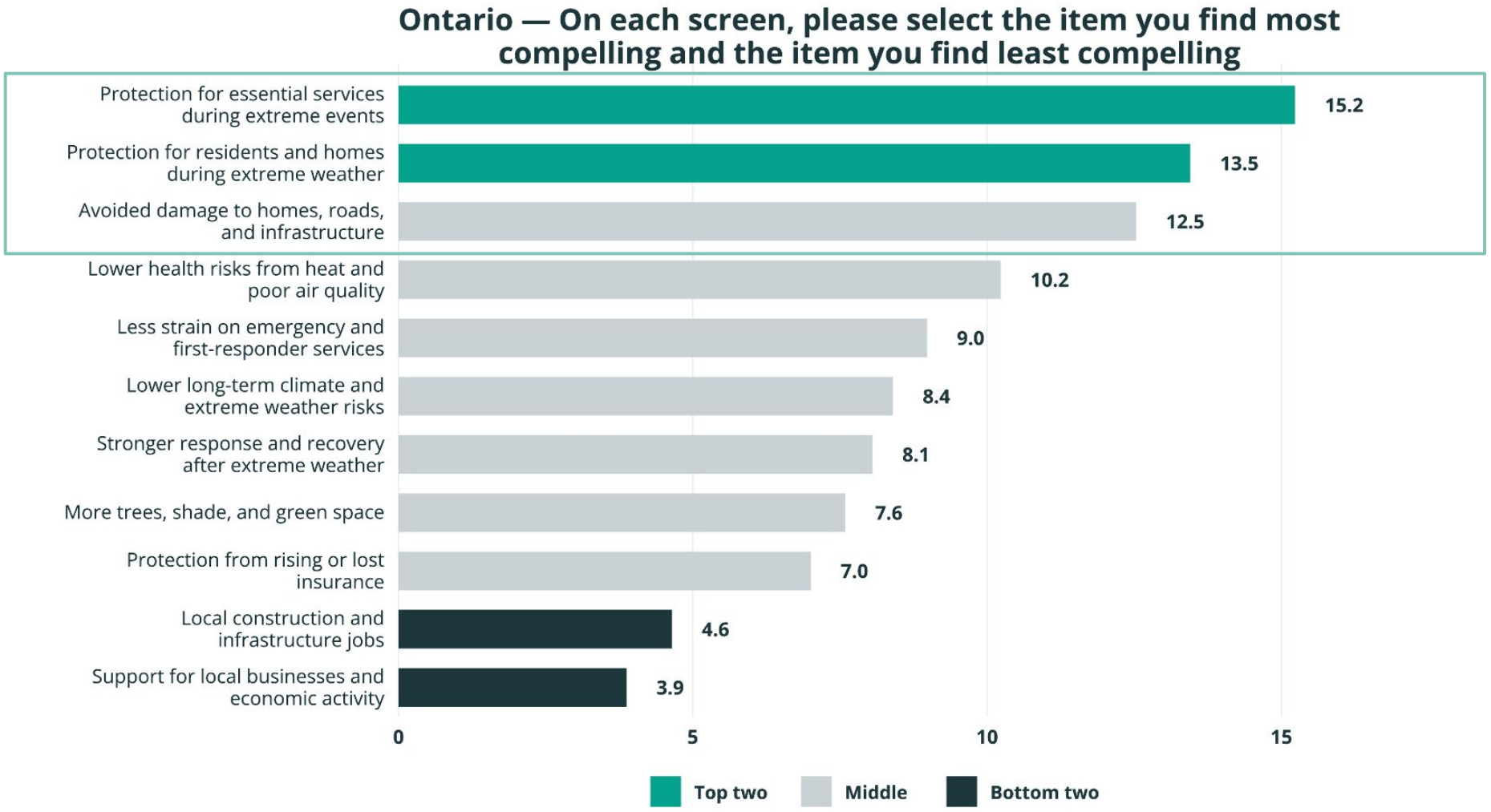
Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 1298

Which co-benefits resonate most?

You will now see some possible benefits of preparing communities for more frequent and severe extreme weather. On each screen, please select the item that you find MOST compelling and which you find LEAST compelling.

- **Safety:** Protects residents and homes from harm during extreme weather events
- **Health**: Reduces health risks from extreme heat and poor air quality
- **Cost avoidance:** Helps avoid costly damage to homes, roads, and public infrastructure
- **Affordability**: Reduces the risk of rising insurance costs or loss of insurance over time
- **Infrastructure protection**: Protects essential services like roads, power, and wastewater systems during extreme events
- **Community resilience**: Helps communities respond to and recover from extreme weather events
- **Emergency capacity**: Reduces strain on emergency and first-responder services during major events
- **Liveability**: Helps expand trees, shade, and green space that reduce heat exposure and improve comfort
- **Local economy**: Supports local businesses and economic activity in the community
- **Local jobs**: Promotes local jobs in construction and community infrastructure projects
- **Future risk reduction:** Reduces the long-term risks communities face from climate change and extreme weather

Protection, protection, protection



Utility scores sum to 100. Average = 9.09. N = 1,333.

Adaptation takeaways

- Adaptation politics are primarily about protection, effectiveness, and implementation competence.
  - Residents want evidence that investments will reduce risks, protect residents and infrastructure, and be delivered on time and on budget.
- Costs and financing remain central implementation concerns, especially among homeowners.
  - Affordability, fairness, and accountability continue to shape support for adaptation investments.
- Lived extreme-weather experience is associated with greater demand for evidence that adaptation investments will work.
  - Residents with lived experience place greater emphasis on risk reduction and protection benefits, while affordability and fairness concerns remain salient.
- Adaptation support appears less ideologically polarized than housing decarbonization.
  - Support is shaped more by practical concerns around cost, competence, effectiveness, competence and accountability than by broad opposition to climate action itself.
- Climate language is not universally toxic, but extreme weather preparedness may broaden appeal.
  - Protection of residents, homes, infrastructure, and essential services consistently outperforms broader framing around jobs, resilience, or climate mitigation.

Questions?

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Trusted messengers

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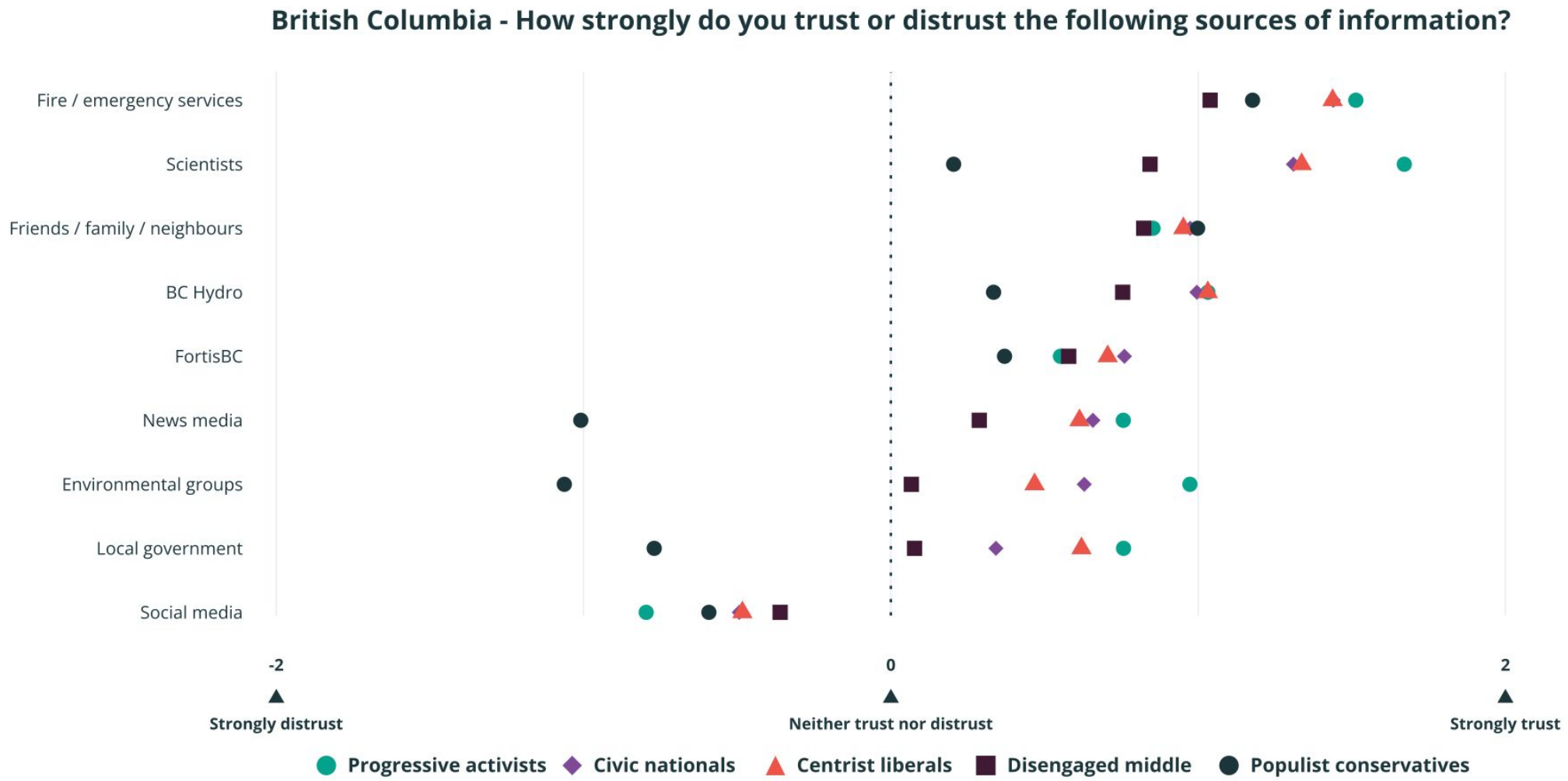
Trust by segment



Messenger takeaways

- Fire and emergency services are uniquely trusted across all audiences.
- Friends, family, and neighbours are broadly trusted.
- Scientists retain strong credibility beyond most climate-engaged audiences.
- Environmental groups and news media are more polarizing.
- Utilities occupy a relatively credible middle ground, especially BC Hydro in BC.
- Social media is broadly distrusted.
- Operational and community-based messengers outperform ideological actors.

Conclusion

Implications for cities

- There appears to be more political space for municipal climate action than is commonly assumed in the current economic context.
  - Segmentation helps cities better understand middle audiences as more pragmatic, less ideological than a loud vocal minority might suggest.

- Municipal climate politics are more shaped by implementation concerns than by climate concerns alone.
  - Across housing and adaptation, residents want reassurance around affordability, effectiveness/reliability, fairness and competent delivery.
  - Yet housing decarbonization and preparedness operate differently politically, with adaptation generating broader consensus, while electrification being more politically sensitive and implementation-dependent.

- Segmentation helps cities better understand where support exists, where resistance or uncertainty may emerge, and which communication strategies are most likely to build durable coalitions of support.

What cities should do differently

- Don’t assume opposition is insurmountable or monolithic.
- Lead with practical benefits residents can immediately understand.
- Pair ambition with implementation reassurance.
- Treat electrification differently from energy efficiency.
- Use clear, concrete, non-technical language.
- Match messengers and frames to different audiences.
- Use trusted operational and community-based messengers.
- Tailor communications to different segments’ concerns, values, and needs.

Questions?

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Extras

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Segment profiles in British Columbia

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Progressive activists

Characteristics:

- Older, strongly female-skewing, and more highly educated
- Less culturally diverse
- Less reliant on fossil-fuel heating and less likely to live in single-detached homes
- Household income and access to cooling systems close to the regional average

Readiness & exposure:

- High levels of perceived readiness, especially around reducing household energy use and knowing where to access support for extreme-weather preparedness
- Strong confidence in reducing household energy use, but more mixed confidence in reducing vulnerability to extreme weather
- High levels of lived exposure to climate-related impacts, especially extreme heat and wildfire smoke

Civic nationals

Characteristics:

- Older than average and somewhat less university educated
- Household income and cultural diversity close to the regional average
- Slightly more likely to live in single-detached homes, while heating and cooling patterns remain close to average

Readiness & exposure:

- One of the most confident and action-ready segments in BC
- Especially likely to know what steps to take to reduce household energy use and to feel confident those actions can make a difference
- More confident than average in their ability to reduce vulnerability to extreme weather
- Particularly likely to report wildfire smoke and wildfire-related exposure

Centrist liberals

Characteristics:

- More female and somewhat more highly educated than average
- Income, cultural diversity, housing, and household energy profiles broadly close to the regional average

Readiness & exposure:

- Awareness of household energy-saving actions and confidence in reducing energy use remain close to average
- Less confident than average in their ability to reduce vulnerability to extreme weather
- More likely to report exposure to extreme heat

Disengaged middle

Characteristics:

- Younger and more culturally diverse than other segments
- Household income and housing patterns broadly in line with the regional average
- Household energy profiles close to average, with somewhat higher access to air conditioning

Readiness & exposure:

- Lower levels of energy-related readiness: fewer say they know what steps to take or feel confident actions can reduce energy use
- Preparedness for extreme weather remains modest and generally close to average
- Lower levels of lived exposure to climate-related impacts, especially extreme heat and wildfire smoke

Populist conservatives

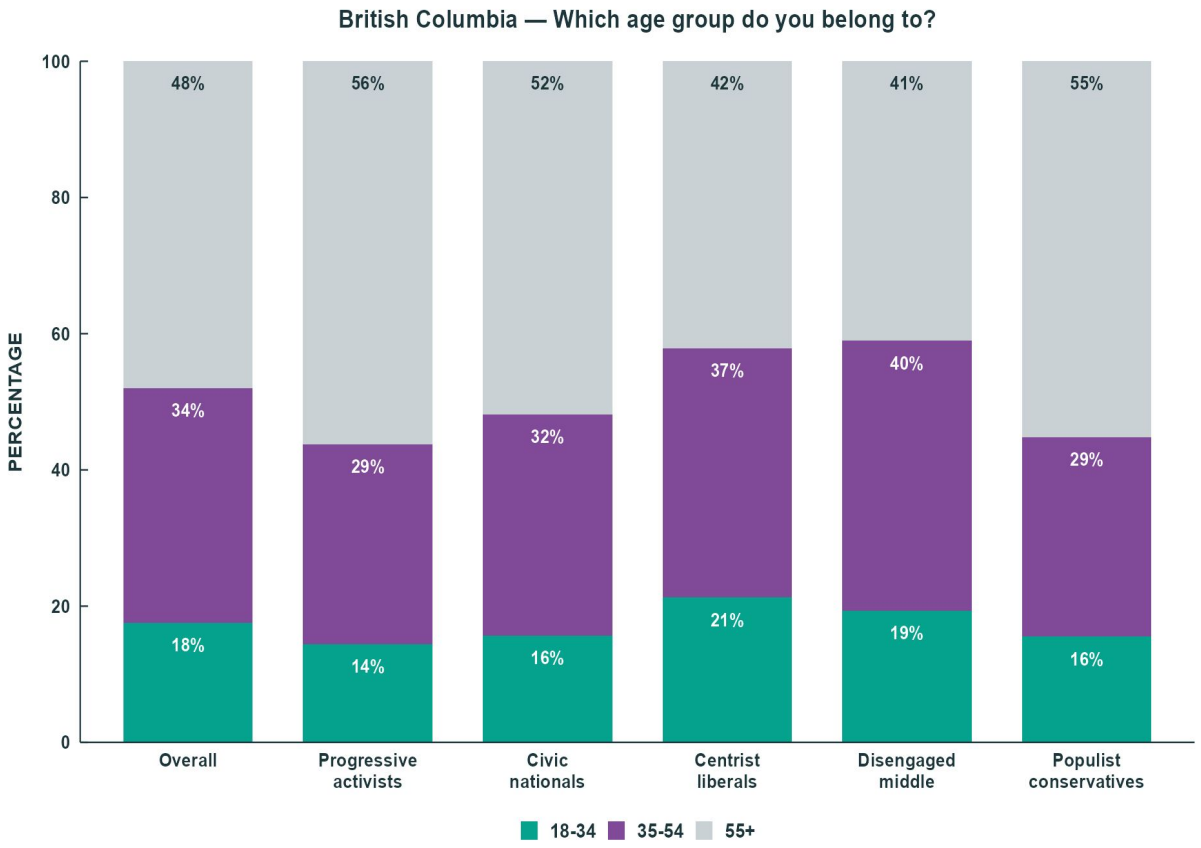
Characteristics:

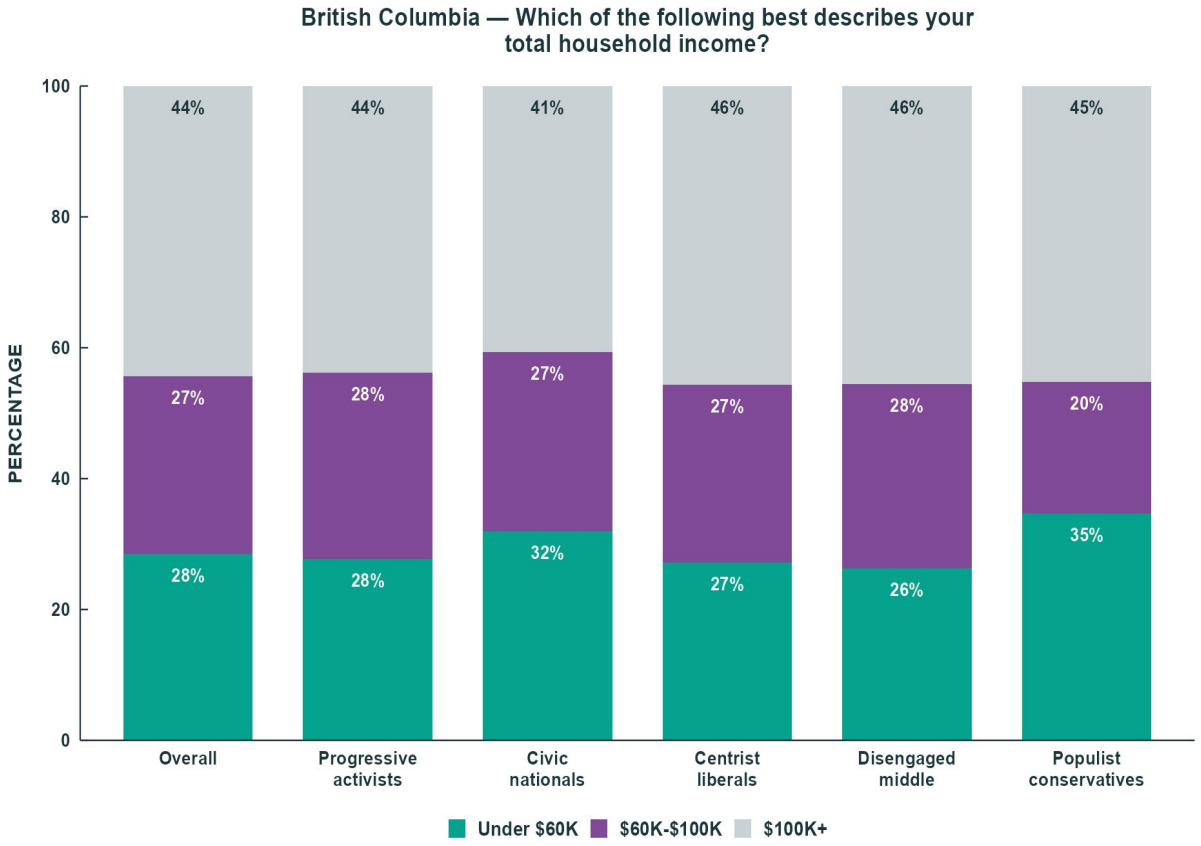
- More male-skewing and less culturally diverse than average
- Household income and housing patterns broadly close to average, though somewhat less likely to be homeowners
- More reliant on fossil-fuel heating systems and less likely to have access to air conditioning

Readiness & exposure:

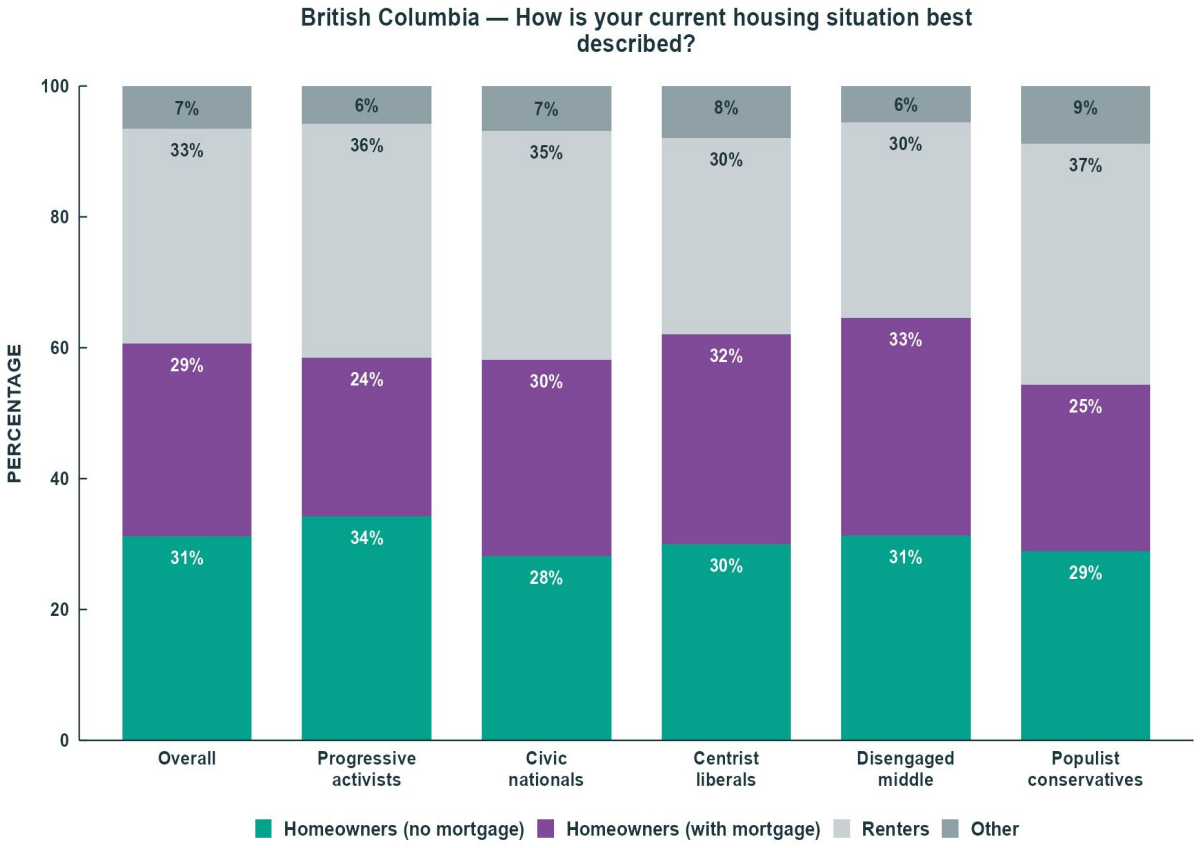
- Lower levels of perceived readiness, especially around knowing where to access support for extreme-weather preparedness
- Less likely to feel that personal actions can meaningfully reduce household energy use or vulnerability to extreme weather
- Lower reported exposure to extreme heat, but more likely to report prolonged storm-related power outages

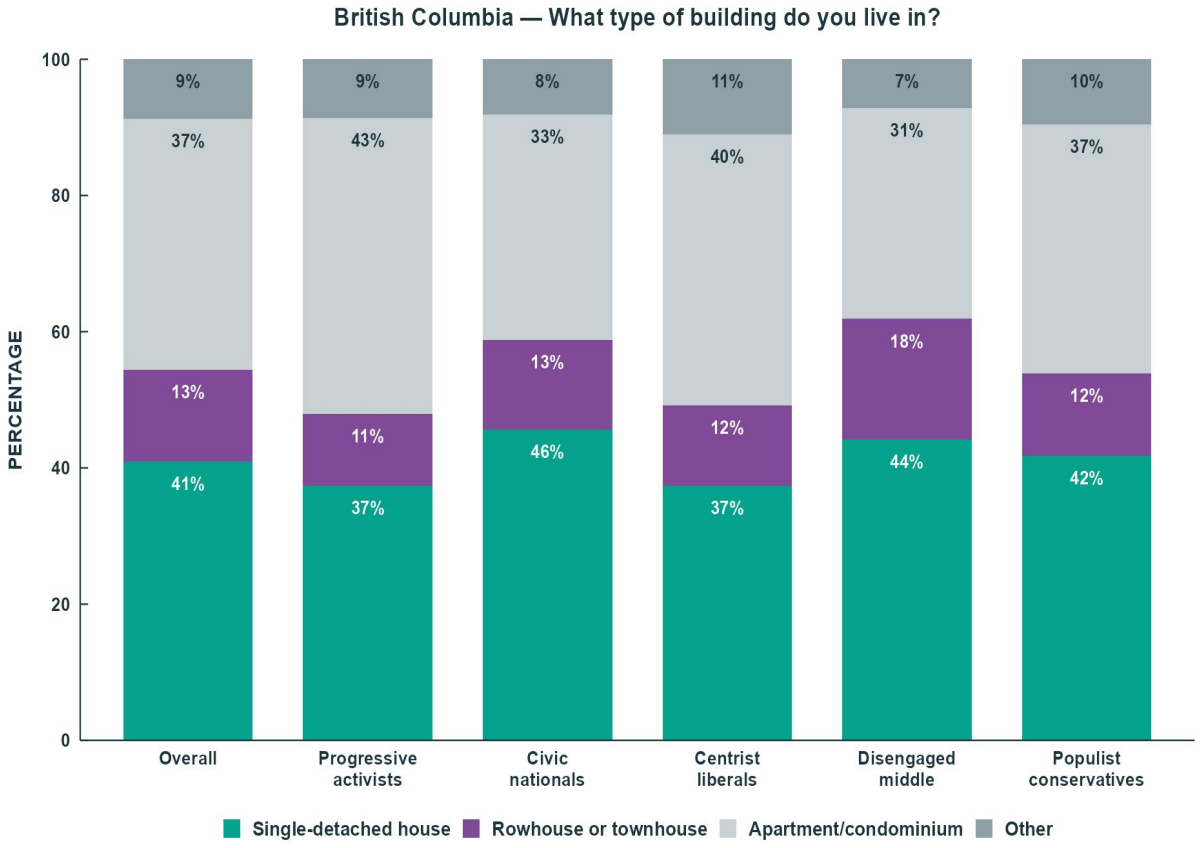
Age and income





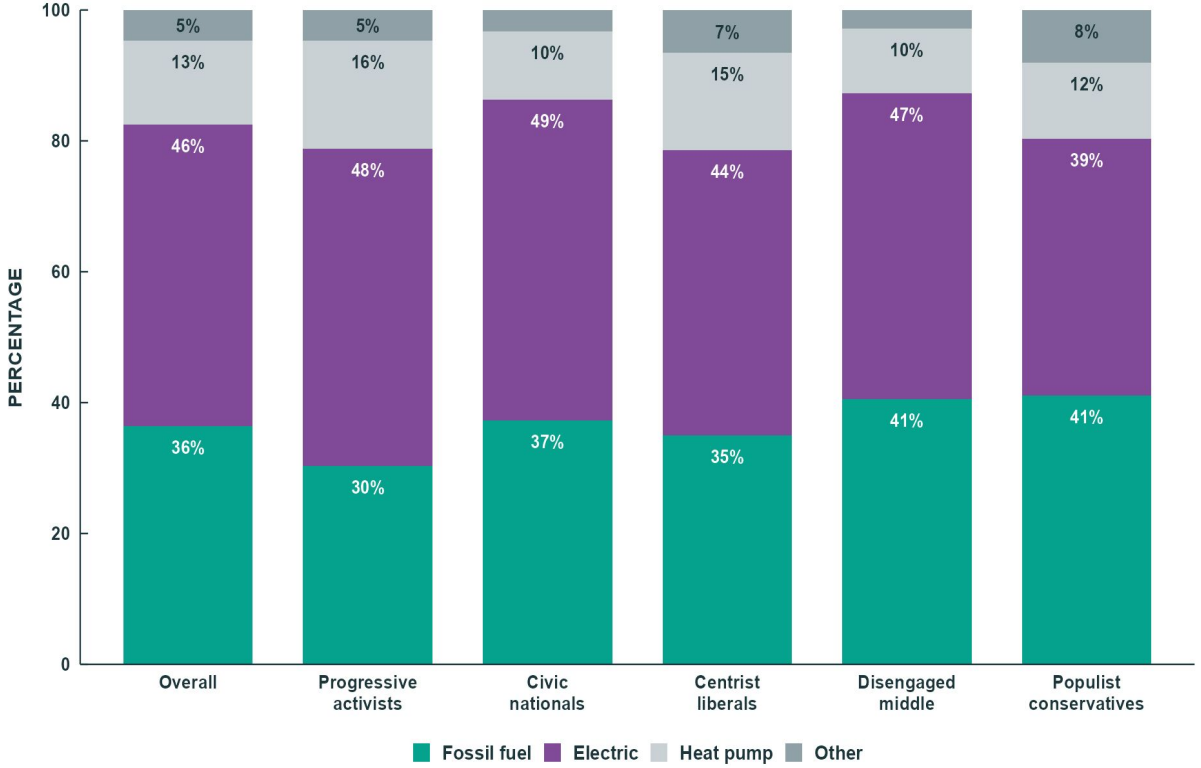
Tenure


British Columbia — How is your current housing situation best described?
PERCENTAGE
100
80
60
40
20
0
7%
33%
29%
31%
6%
36%
24%
34%
7%
35%
30%
28%
8%
30%
32%
30%
6%
30%
33%
31%
9%
37%
25%
29%
Overall
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives
Homeowners (no mortgage)
Homeowners (with mortgage)
Renters
Other

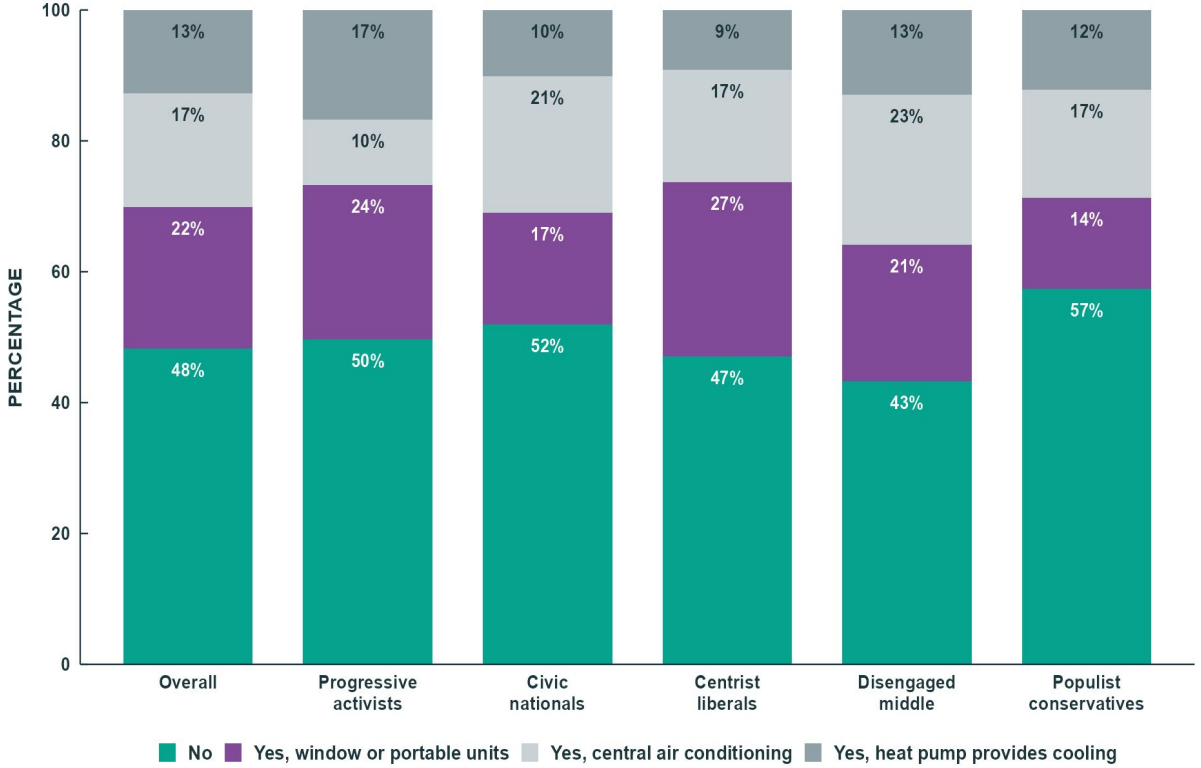

British Columbia — What type of building do you live in?
PERCENTAGE
100
80
60
40
20
0
9%
37%
13%
41%
9%
43%
11%
37%
8%
33%
13%
46%
11%
40%
12%
37%
7%
31%
18%
44%
10%
37%
12%
42%
Overall
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives
Single-detached house
Rowhouse or townhouse
Apartment/condominium
Other

Heating and cooling

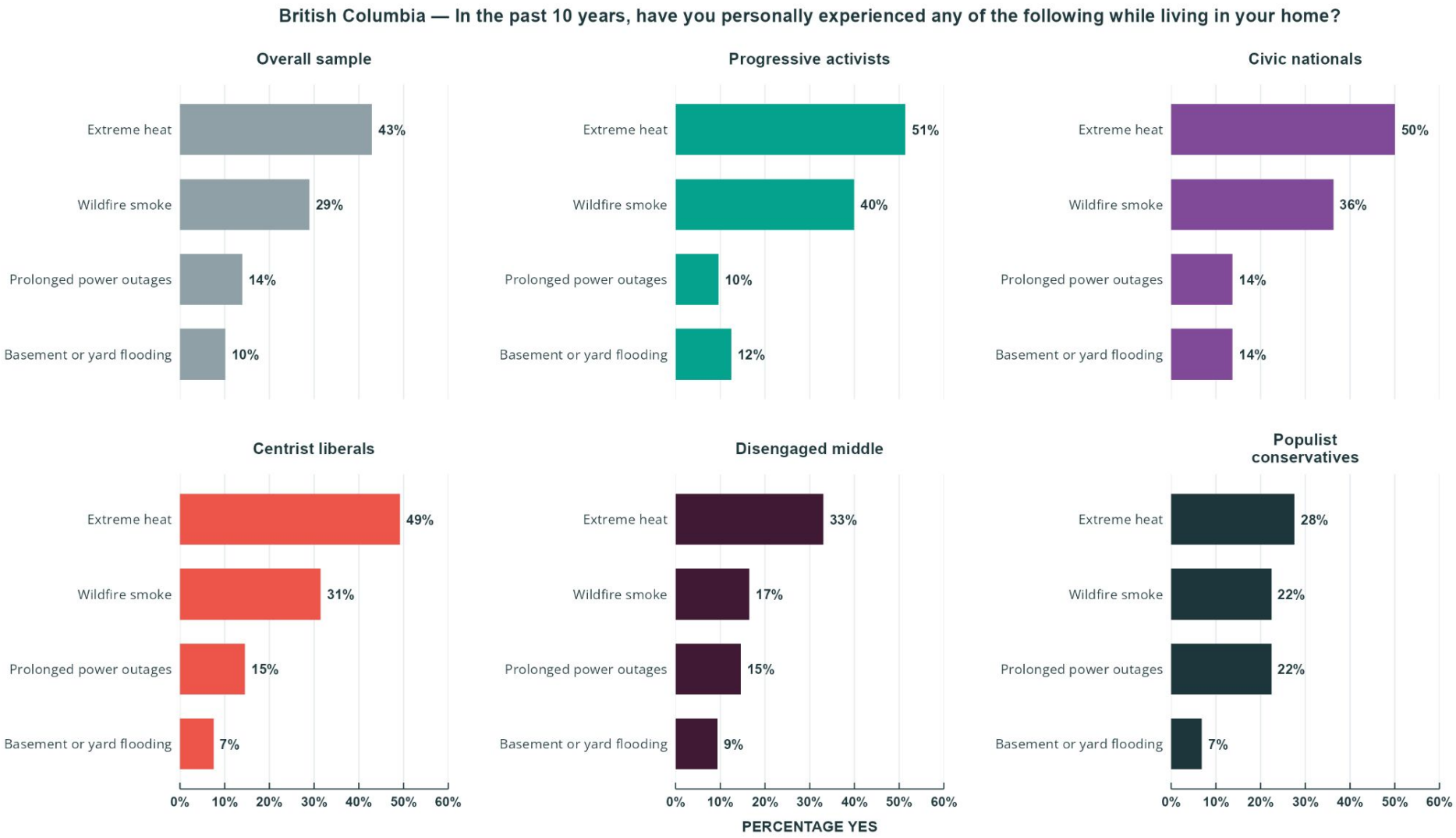
British Columbia — Which system does your home primarily use for space heating?



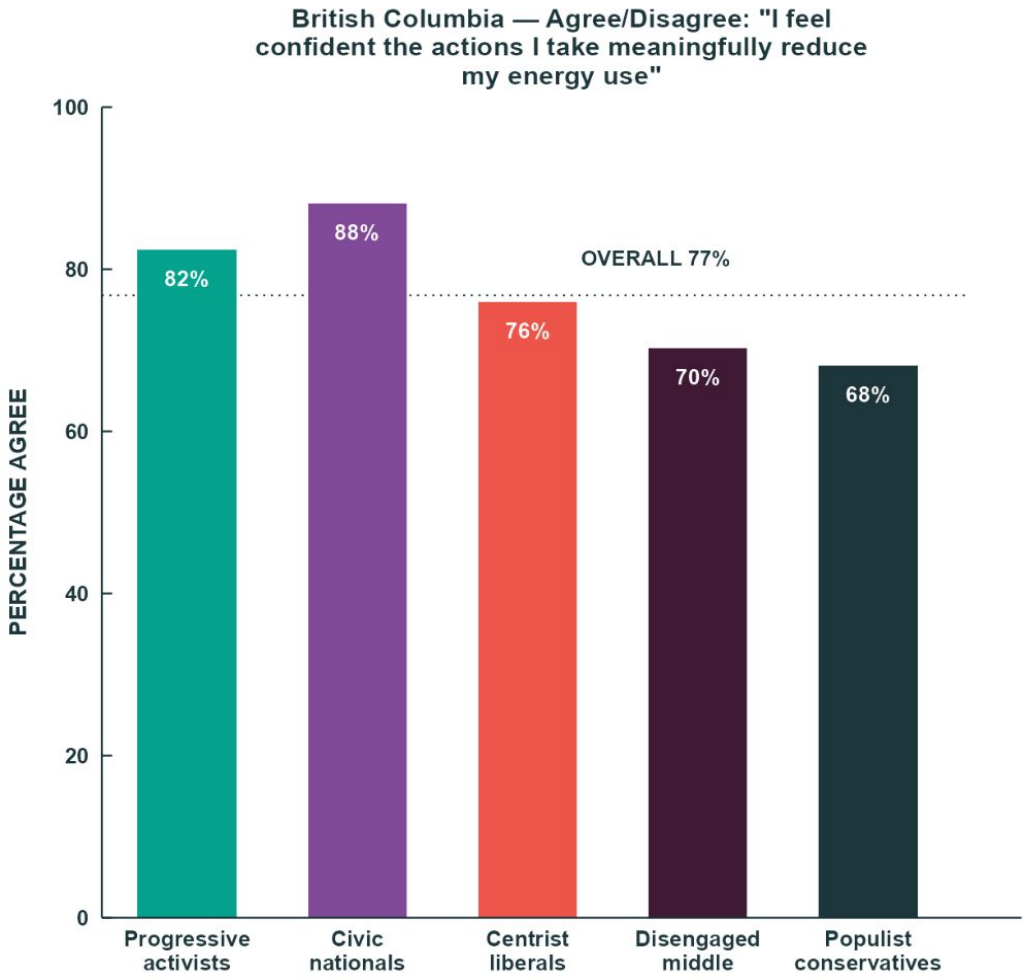
British Columbia — Does your home have air conditioning or mechanical cooling?

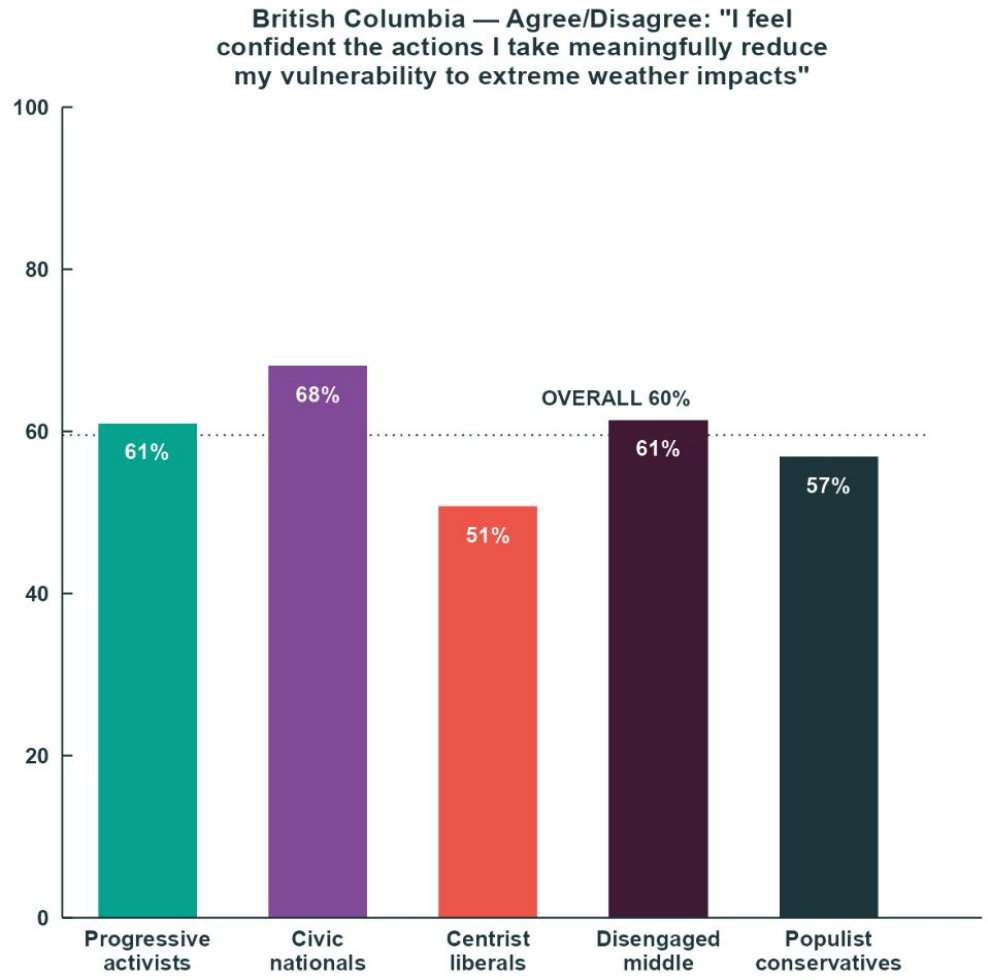


Extreme weather experiences

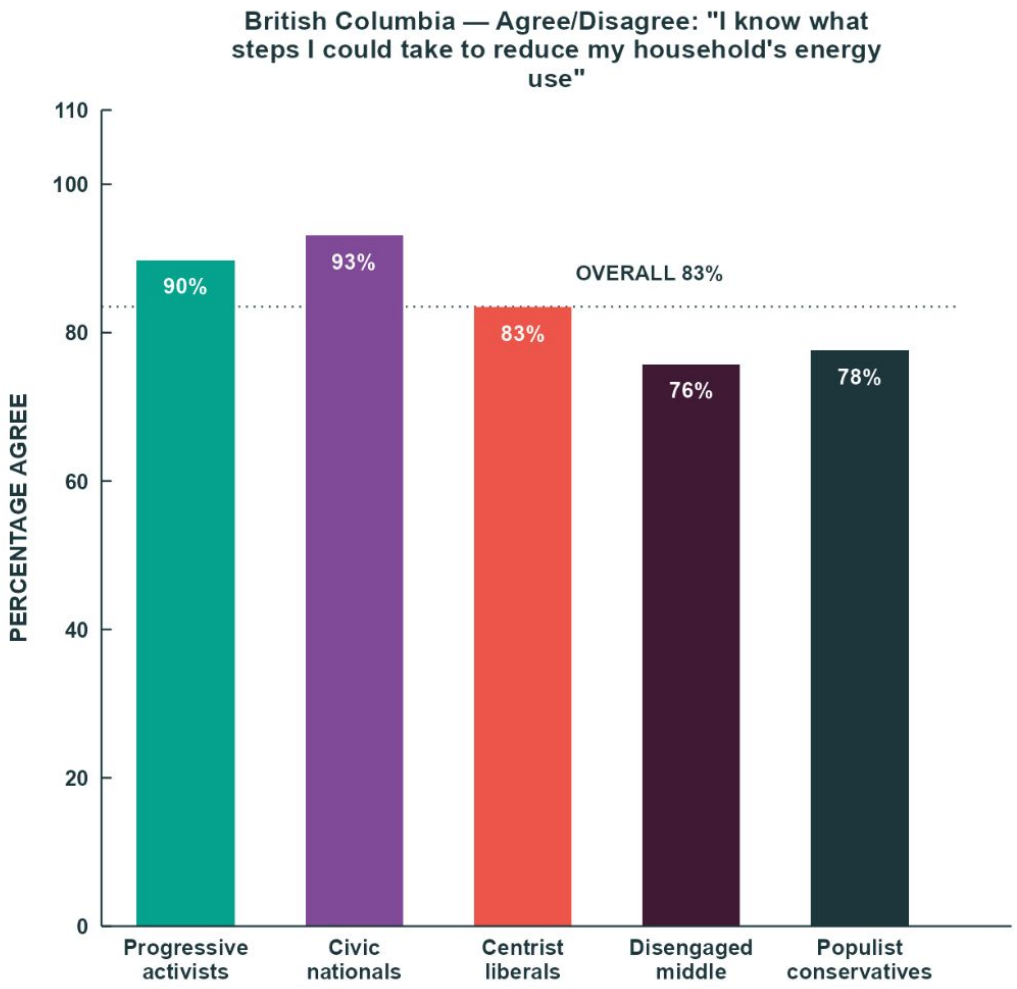


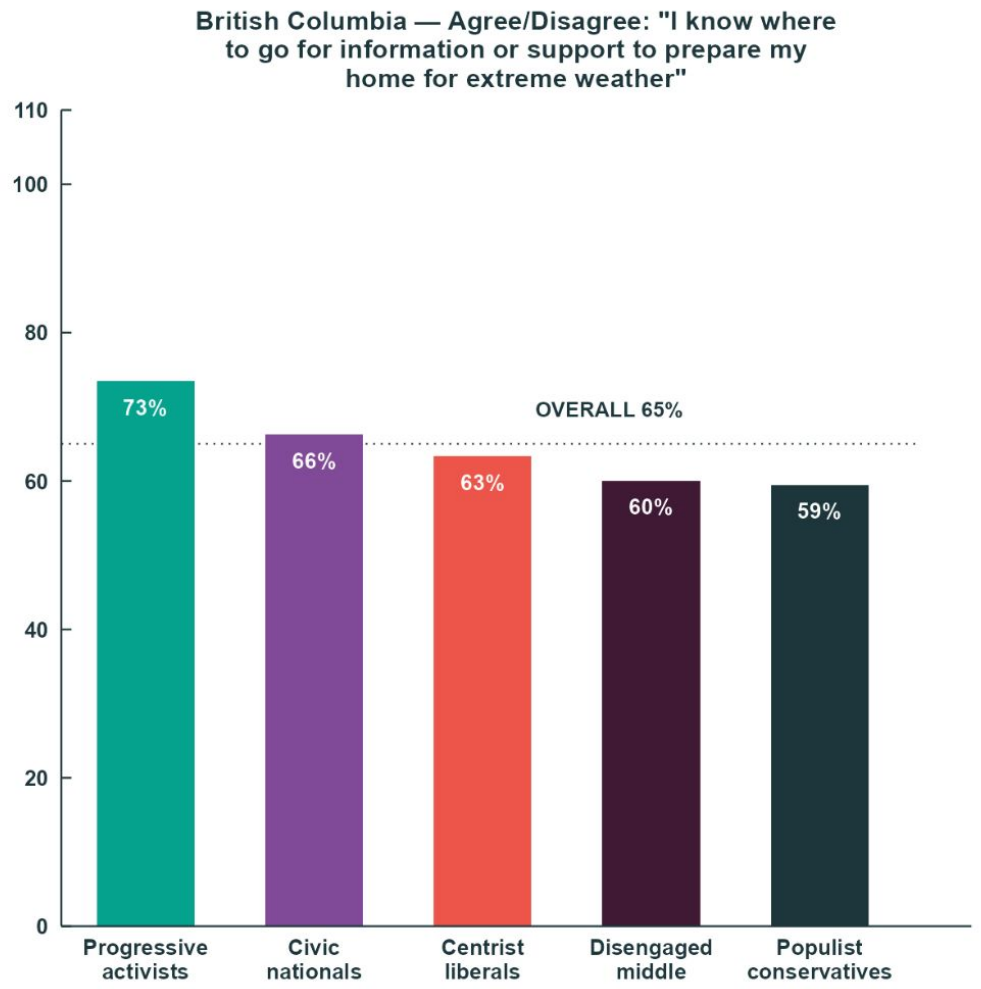
Efficacy


British Columbia — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my energy use"
PERCENTAGE AGREE
100
80
60
40
20
0
OVERALL 77%
82%
88%
76%
70%
68%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

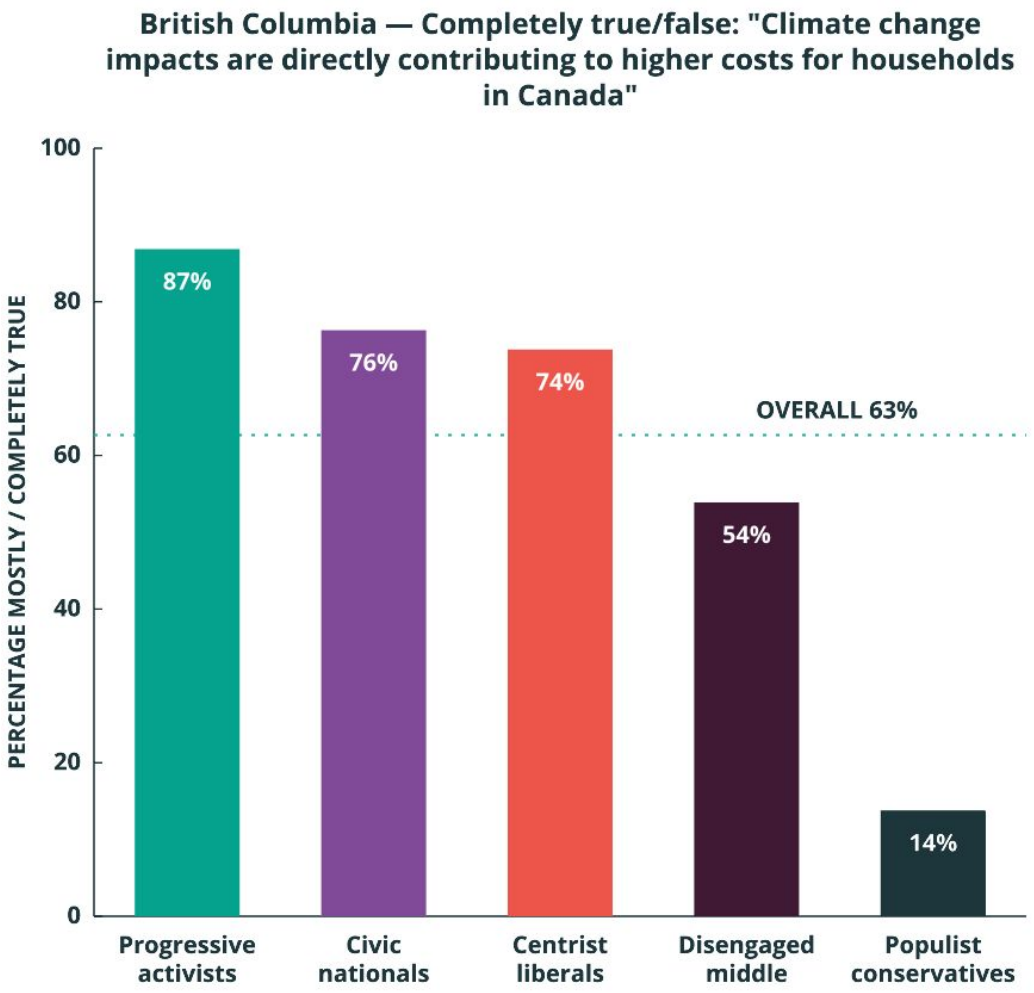

British Columbia — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my vulnerability to extreme weather impacts"
100
80
60
40
20
0
OVERALL 60%
61%
68%
51%
61%
57%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

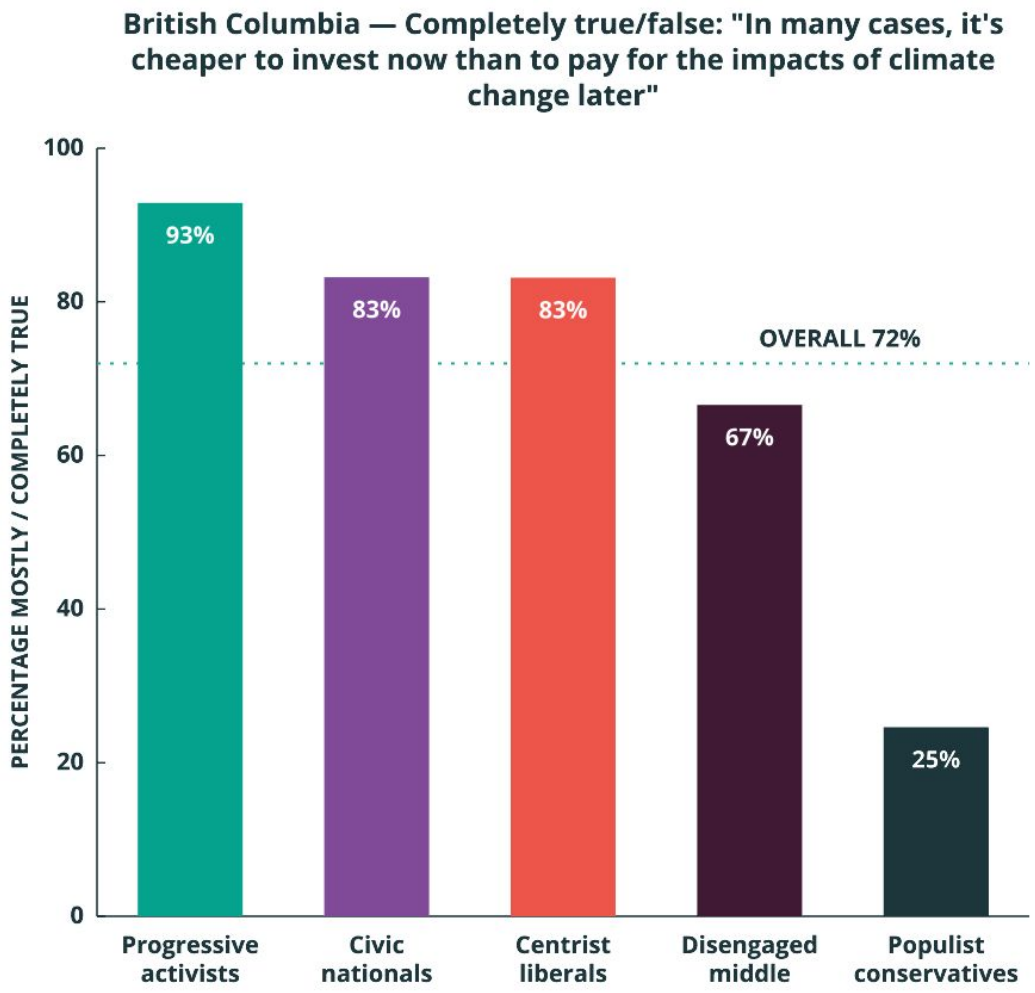
Literacy


British Columbia — Agree/Disagree: "I know what steps I could take to reduce my household's energy use"
PERCENTAGE AGREE
110
100
80
60
40
20
0
90%
93%
83%
76%
78%
OVERALL 83%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives


British Columbia — Agree/Disagree: "I know where to go for information or support to prepare my home for extreme weather"
110
100
80
60
40
20
0
73%
66%
63%
60%
59%
OVERALL 65%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

Belief in cost argument





Segment profiles in Ontario

EcoAnalytics
Shared intelligence for Canada's environment

Progressive activists

Characteristics:

- Tend to be older, highly educated, higher-income, and less diverse relative to other segments
- Housing patterns close to average
- Heating and cooling reflect the broader Ontario context: high AC access and substantial fossil-fuel heating

Readiness & exposure:

- More likely to know what steps to take to reduce household energy use
- Knowledge of where to get extreme-weather support more limited
- Confidence on reducing extreme-weather vulnerability moderate
- Wildfire smoke exposure clearest standout experience

Civic nationals

Characteristics:

- Demographically close to average, but more homeowner-heavy
- Housing and energy profiles fairly typical for Ontario
- Fossil-fuel heating and AC access also reflect the broader Ontario context

Readiness & exposure:

- Stands out more on confidence than on knowledge
- Especially likely to feel that actions can reduce energy use and vulnerability to extreme weather
- Flooding and outages somewhat more salient experiences

Centrist liberals

Characteristics:

- Broadly reflective of the ON average, with somewhat higher diversity
- Income, housing, heating, and cooling patterns close to average

Readiness & exposure:

- Energy readiness close to average
- Confidence around reducing extreme-weather vulnerability somewhat weaker
- Reported weather exposure generally close to average

Disengaged middle

Characteristics:

- Younger and more diverse, with slightly lower income
- Housing and energy profiles close to the average
- High AC access and substantial fossil-fuel heating exposure like most Ontario respondents

Readiness & exposure:

- Moderate readiness overall
- Knowledge of energy actions and where to get extreme-weather support
- Low reported exposure to extreme weather events

Populist conservatives

Characteristics:

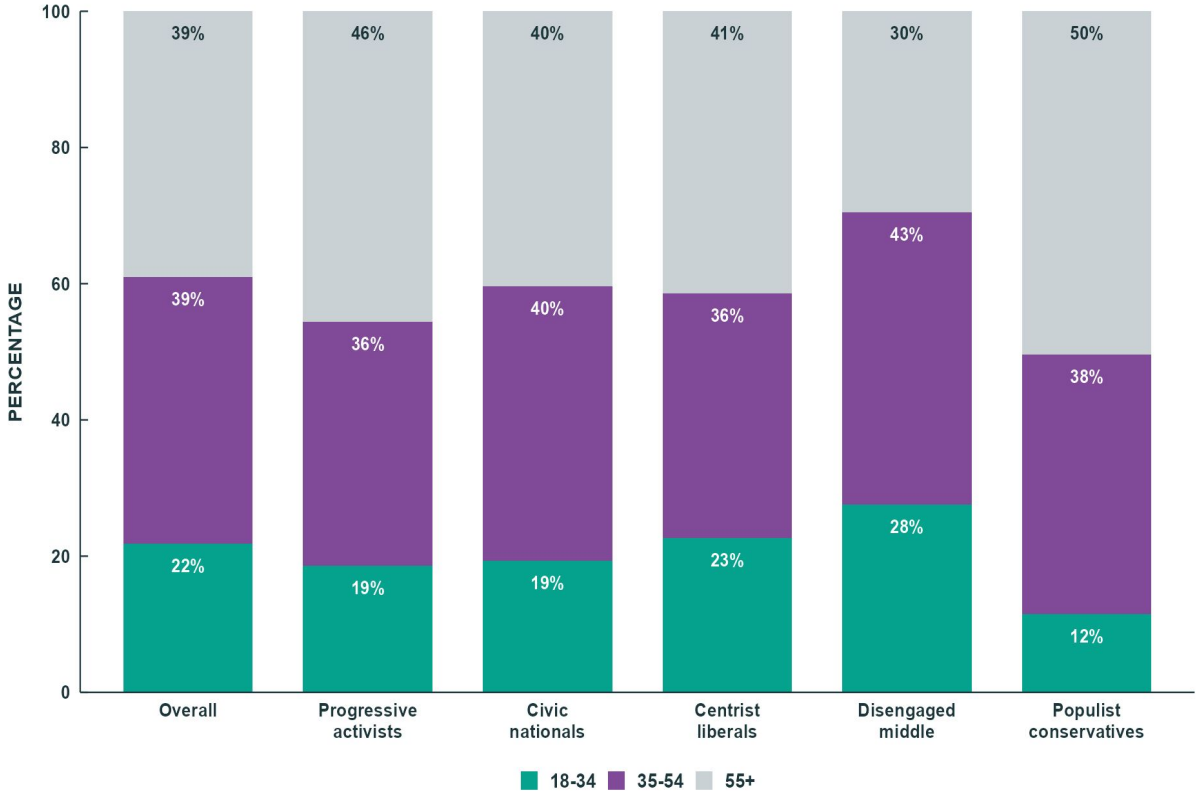
- More male-skewing, older, less diverse, with somewhat lower income
- Housing profile similar to average
- More fossil-fuel dependent for heating; AC access remains high, as it does across Ontario

Readiness & exposure:

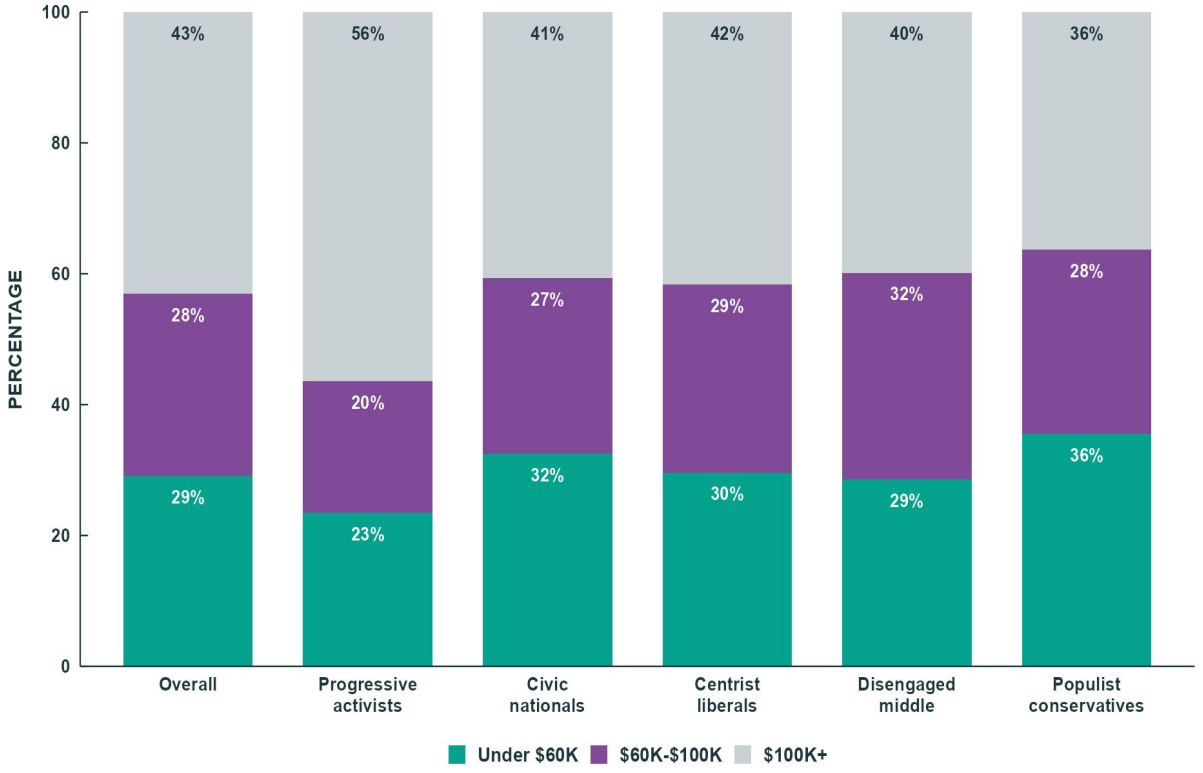
- Readiness weaker overall, especially confidence that personal actions make a difference
- Knowledge of energy-saving actions closer to average, but fewer know where to find support for extreme-weather preparation
- Reported extreme weather experiences generally lower, especially for heat

Age and income

Ontario — Which age group do you belong to?

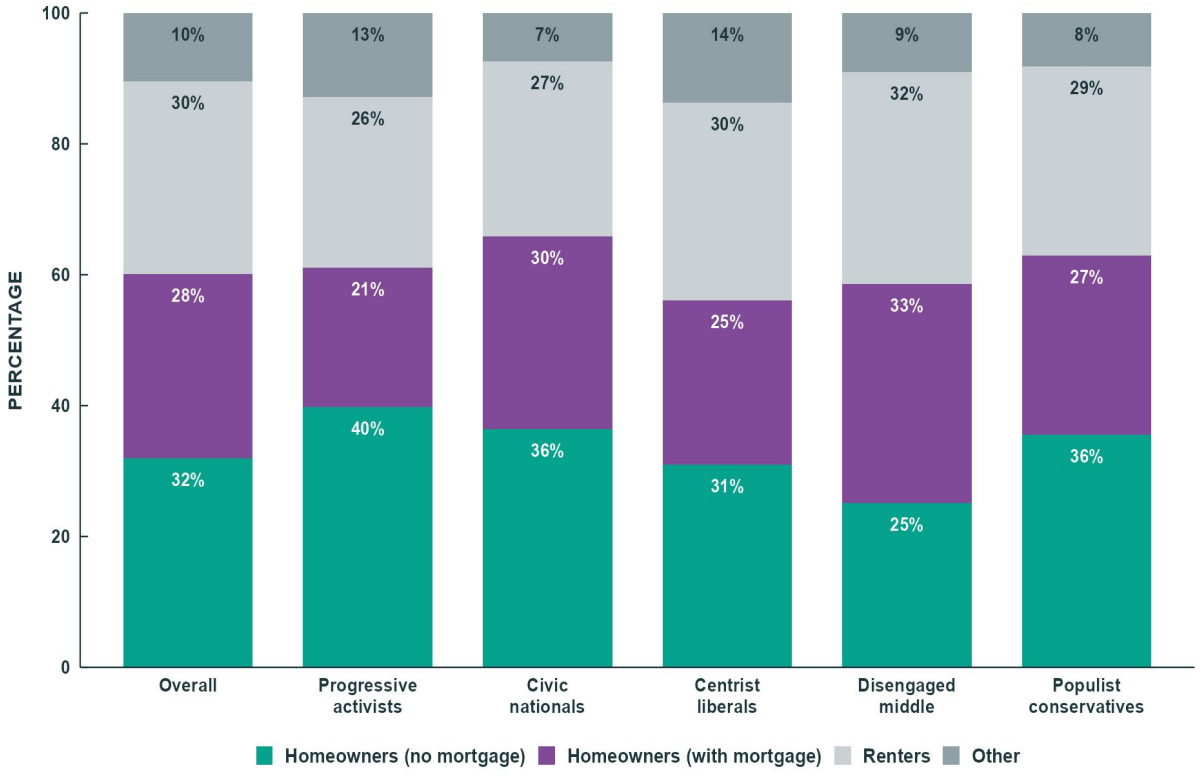


Ontario — Which of the following best describes your total household income?

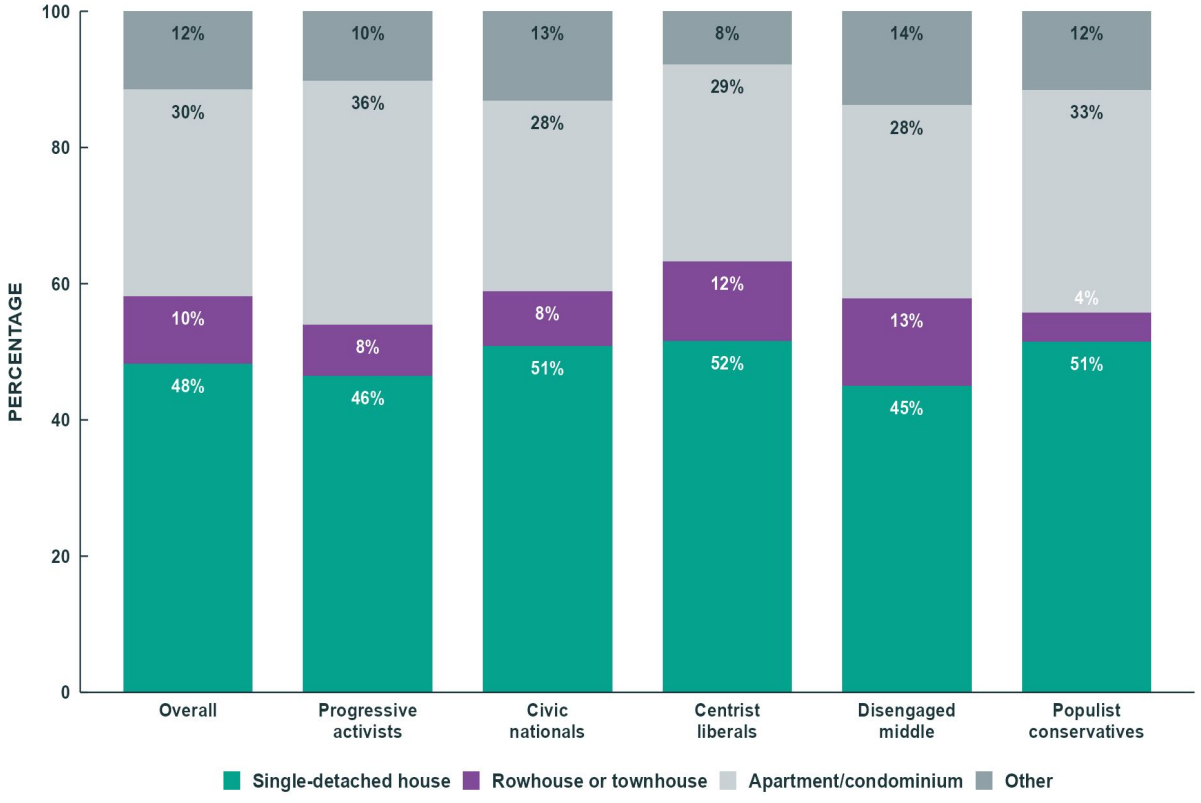


Tenure

Ontario — How is your current housing situation best described?

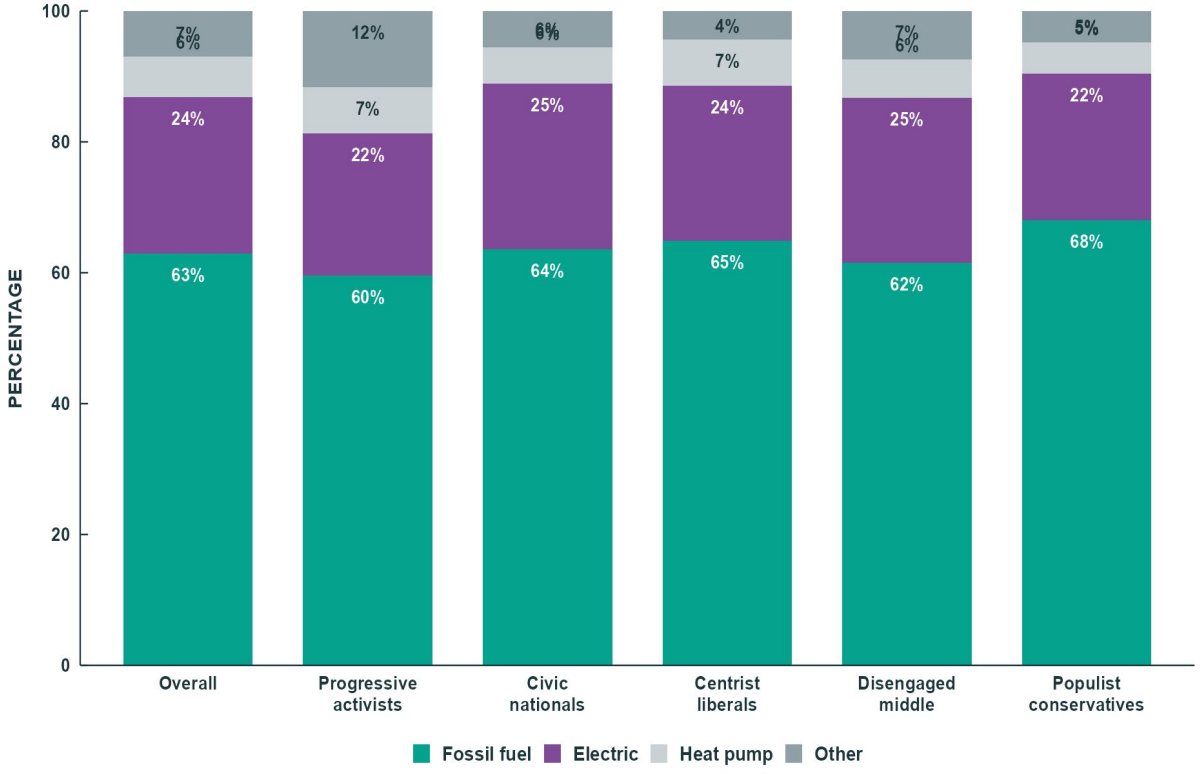


Ontario — What type of building do you live in?

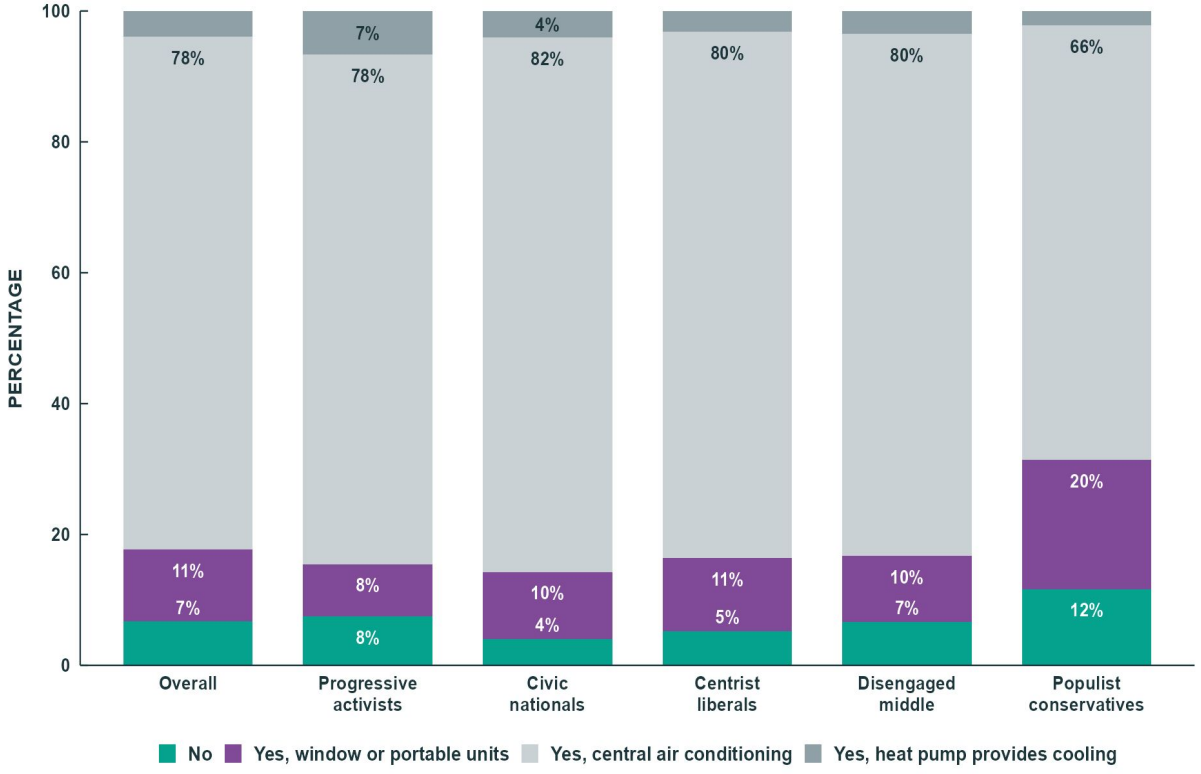


Heating and cooling

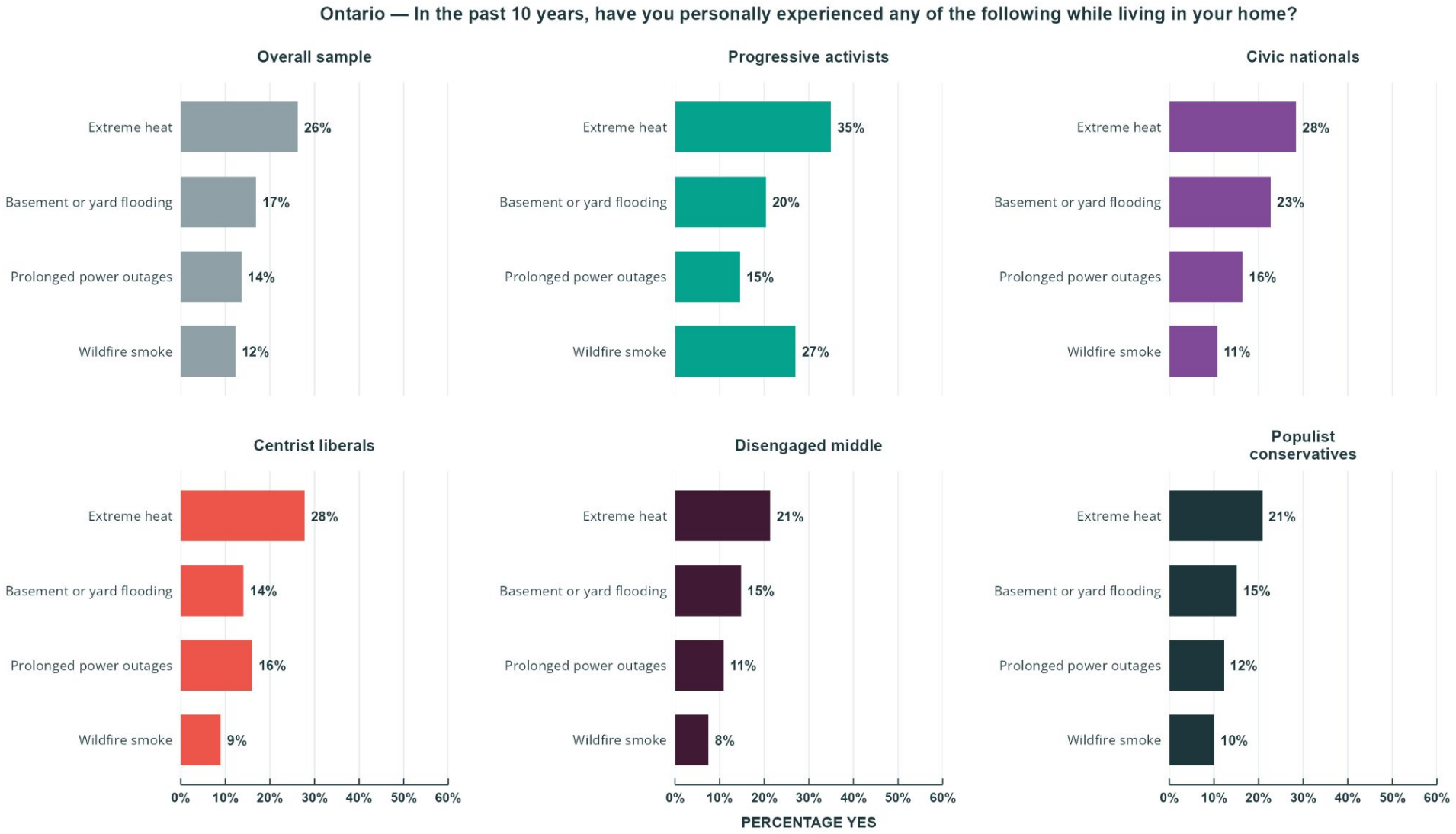
Ontario — Which system does your home primarily use for space heating?



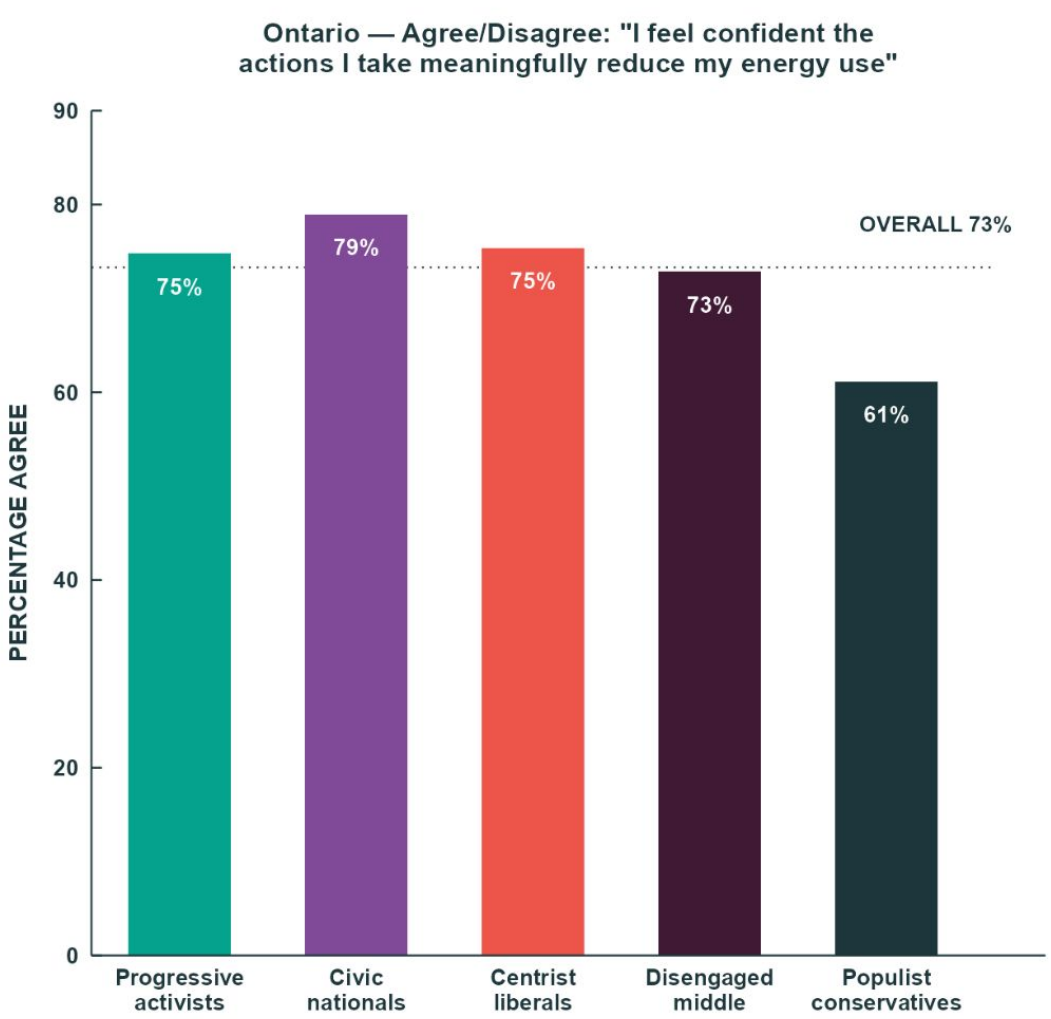
Ontario — Does your home have air conditioning or mechanical cooling?

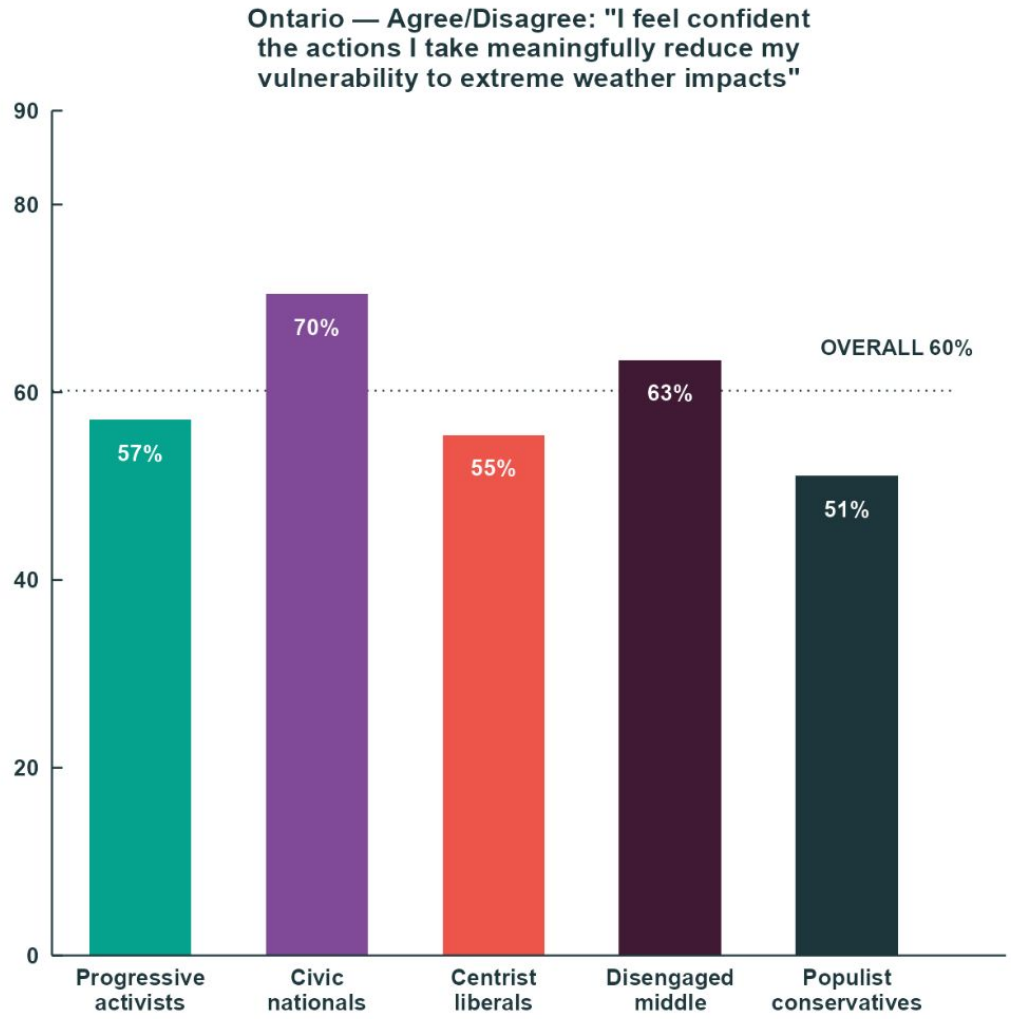


Extreme weather experiences

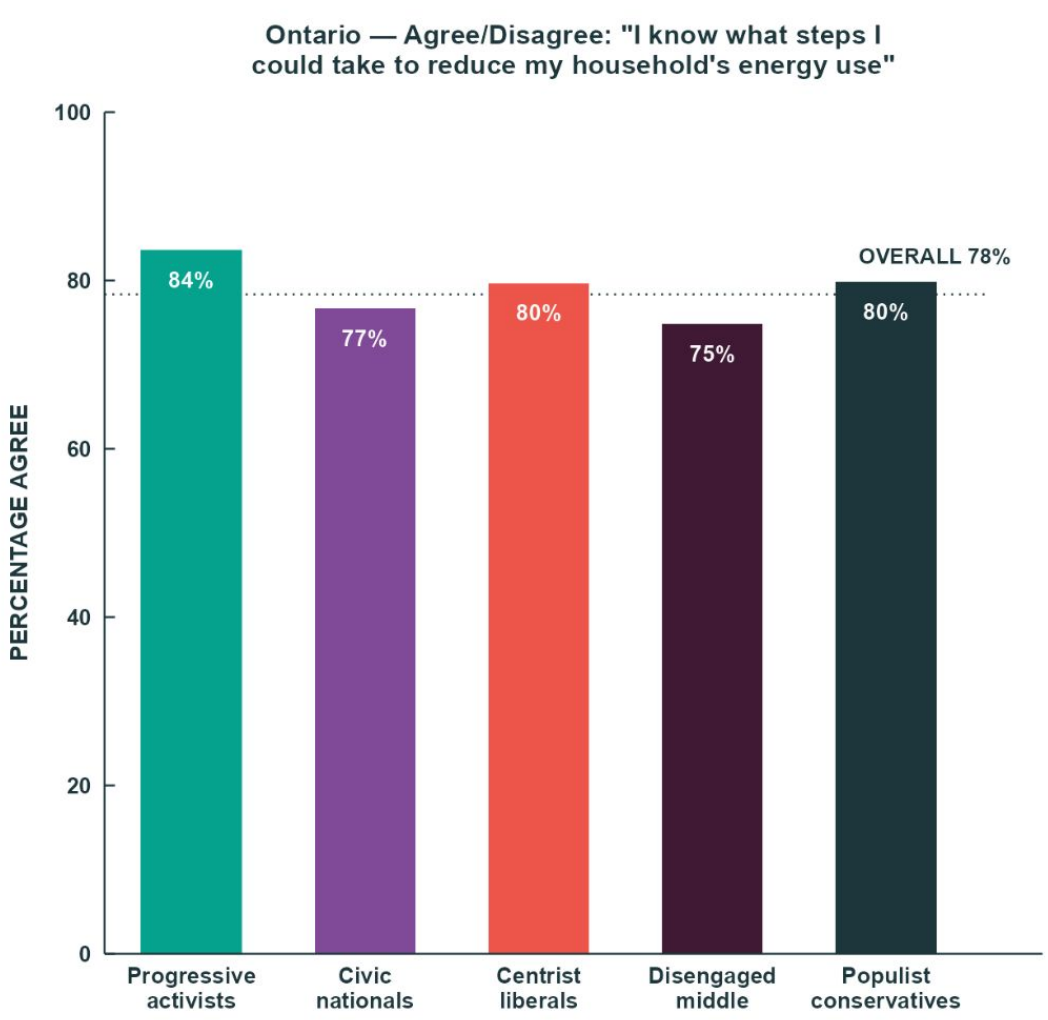


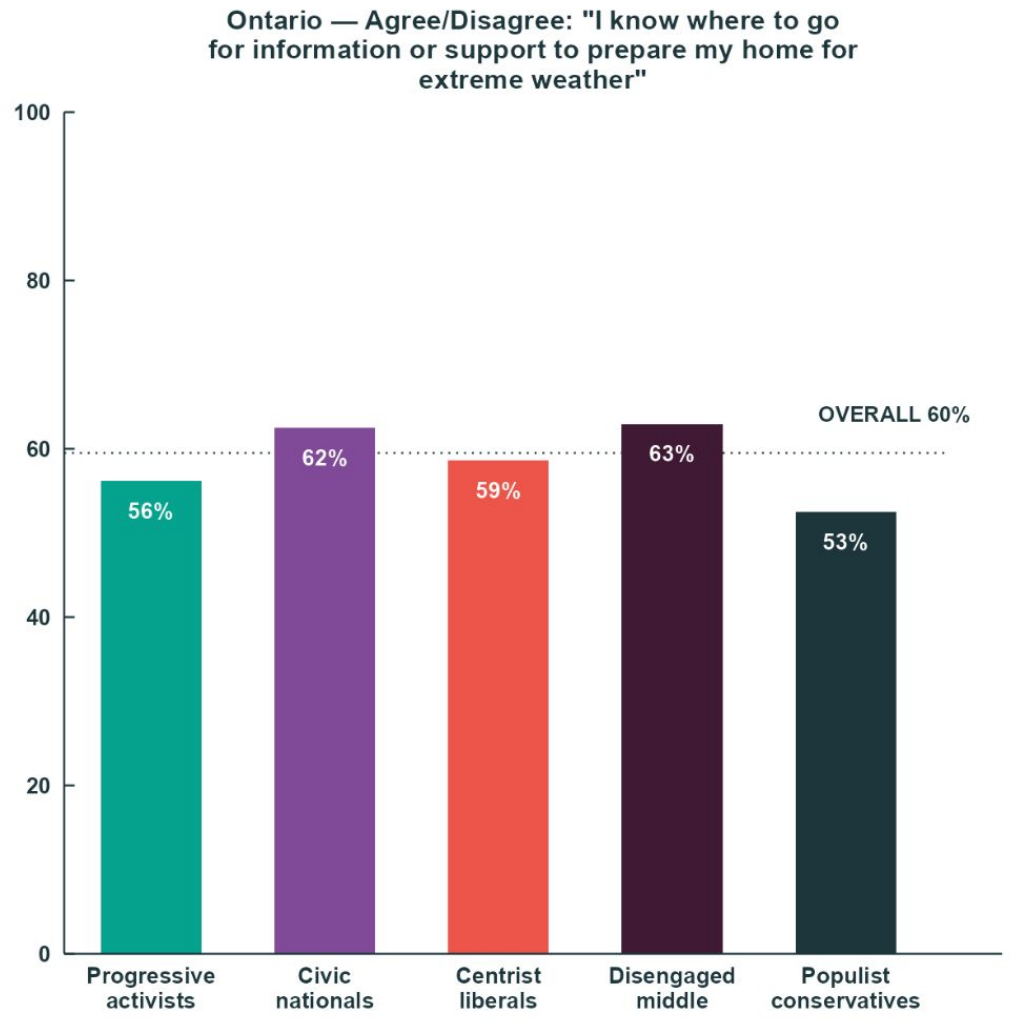
Efficacy


Ontario — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my energy use"
PERCENTAGE AGREE
90
80
60
40
20
0
OVERALL 73%
75%
79%
75%
73%
61%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

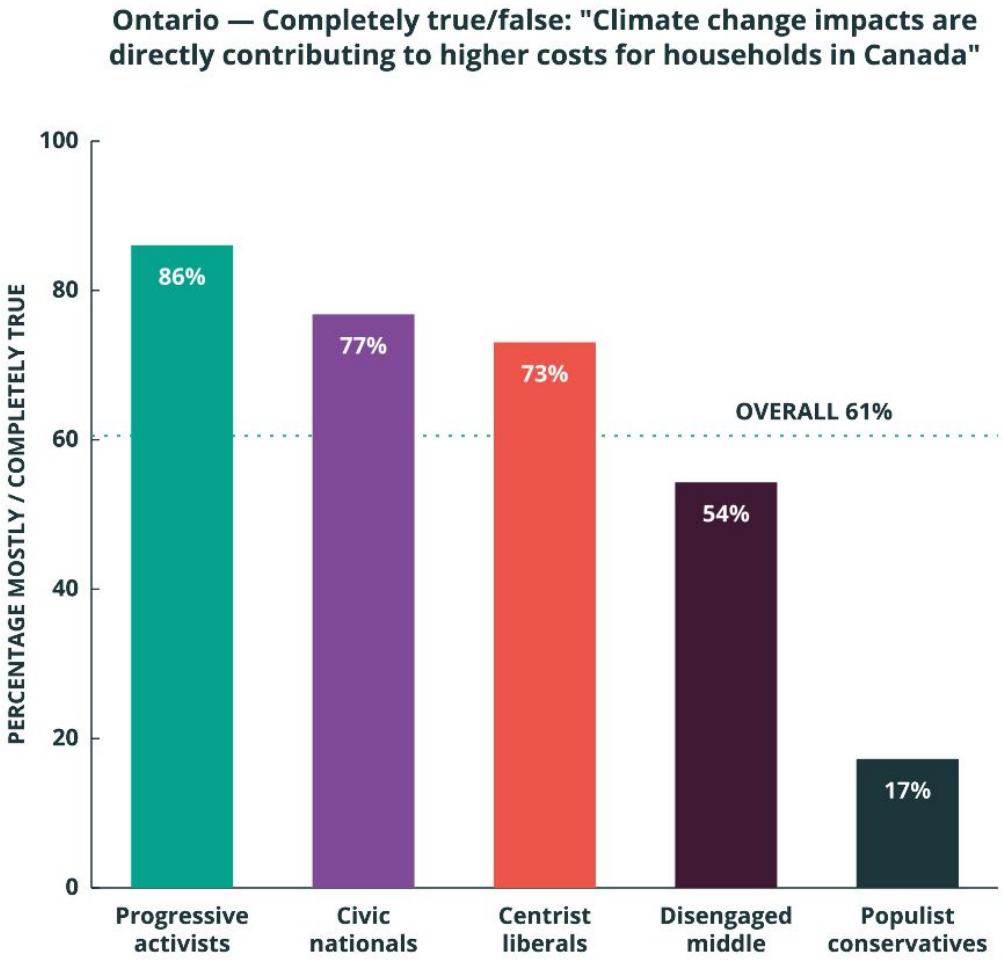

Ontario — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my vulnerability to extreme weather impacts"
90
80
60
40
20
0
OVERALL 60%
57%
70%
55%
63%
51%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

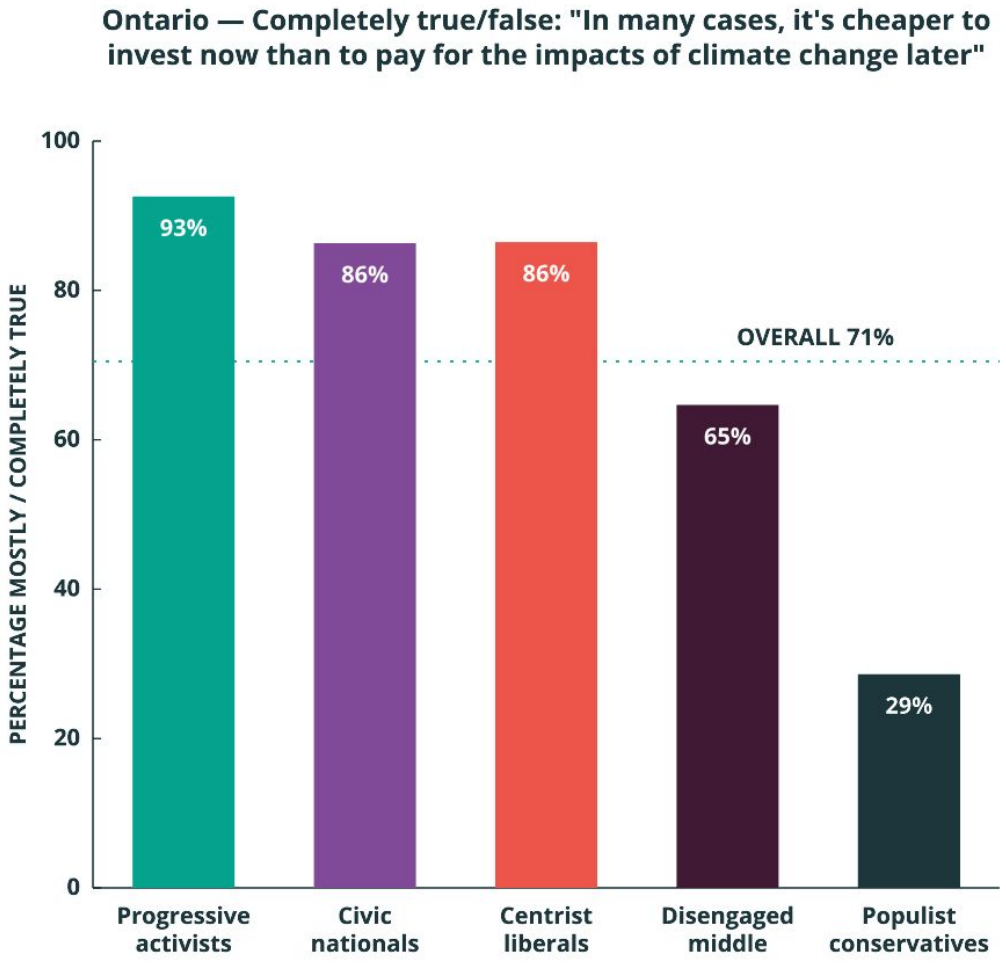
Literacy


Ontario — Agree/Disagree: "I know what steps I could take to reduce my household's energy use"
PERCENTAGE AGREE
100
80
60
40
20
0
OVERALL 78%
84%
77%
80%
75%
80%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives


Ontario — Agree/Disagree: "I know where to go for information or support to prepare my home for extreme weather"
100
80
60
40
20
0
OVERALL 60%
56%
62%
59%
63%
53%
Progressive activists
Civic nationals
Centrist liberals
Disengaged middle
Populist conservatives

Belief in cost argument

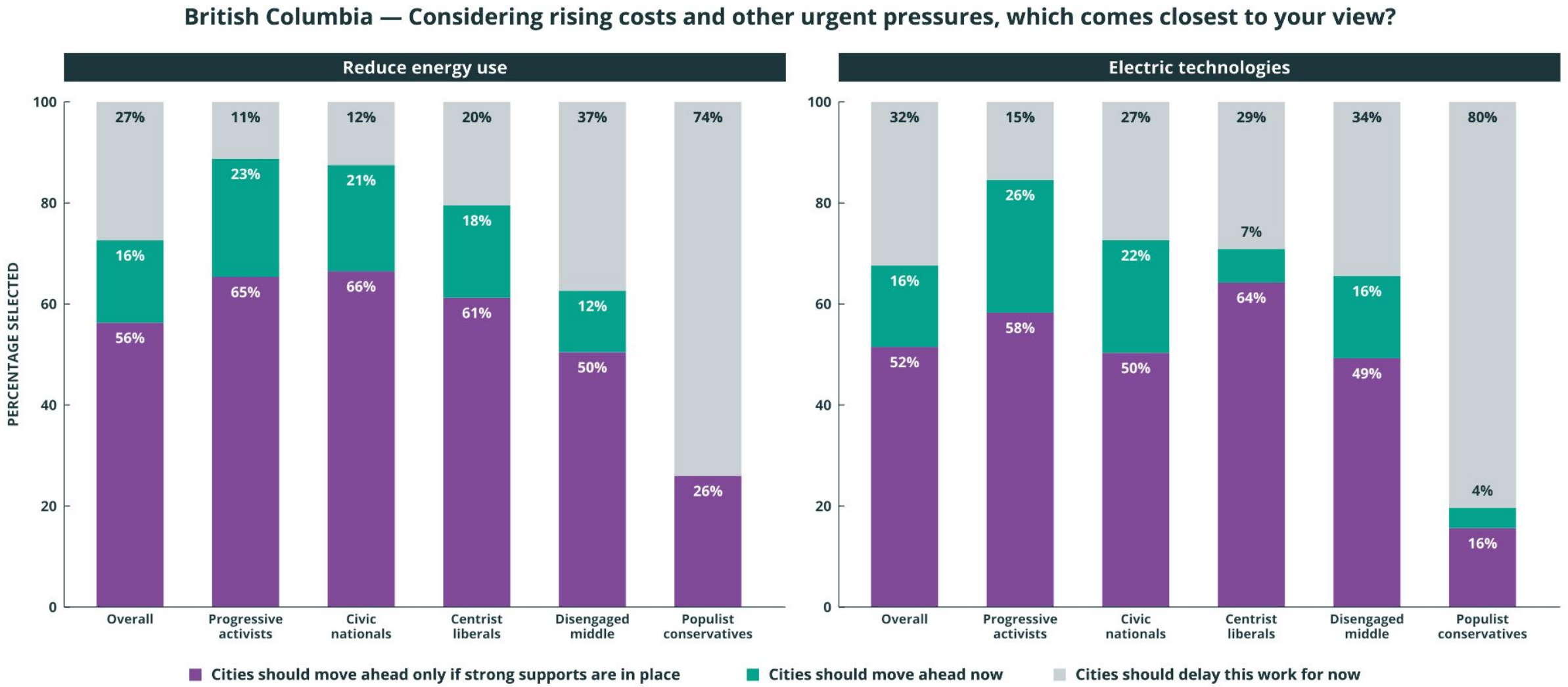




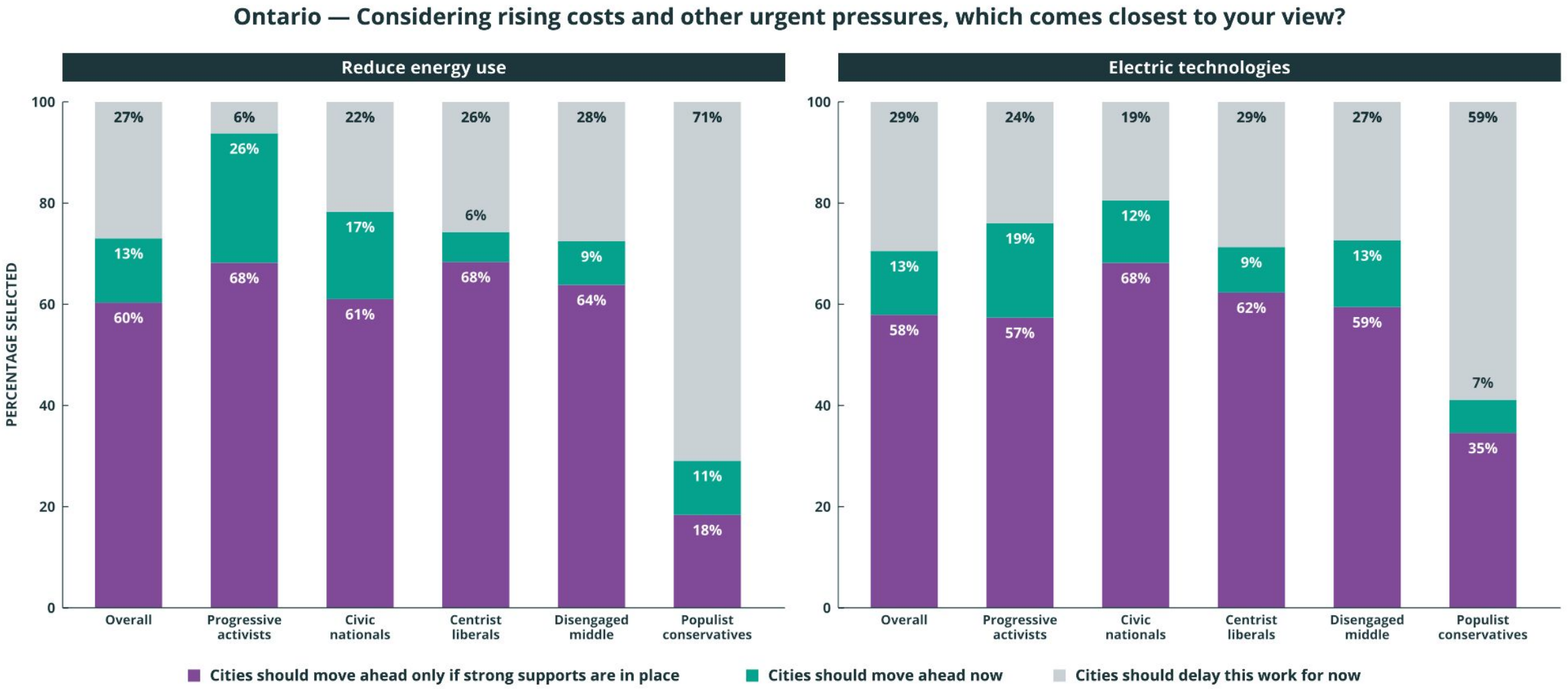
Policy perceptions by segment (British Columbia & Ontario)

EcoAnalytics
Shared intelligence for Canada's environment

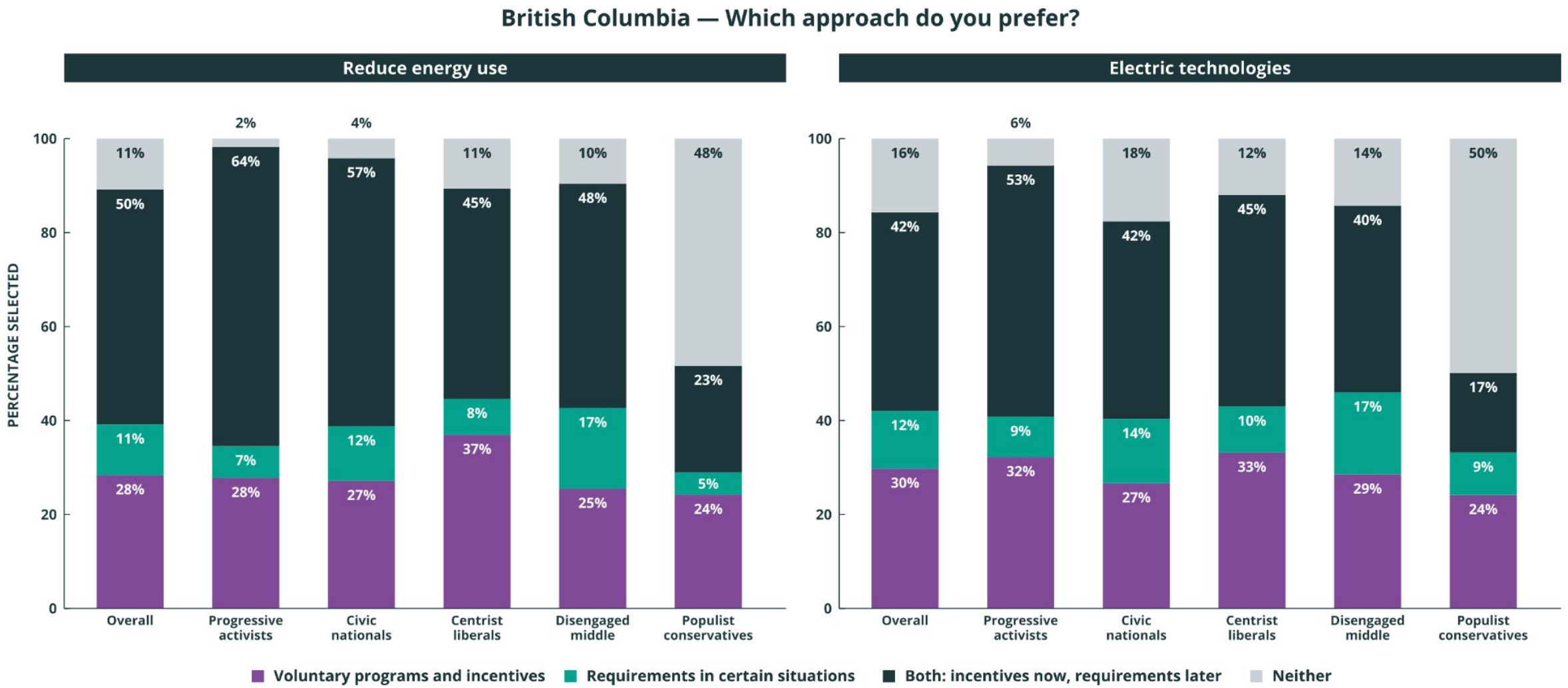
Moving ahead but with conditions (BC)



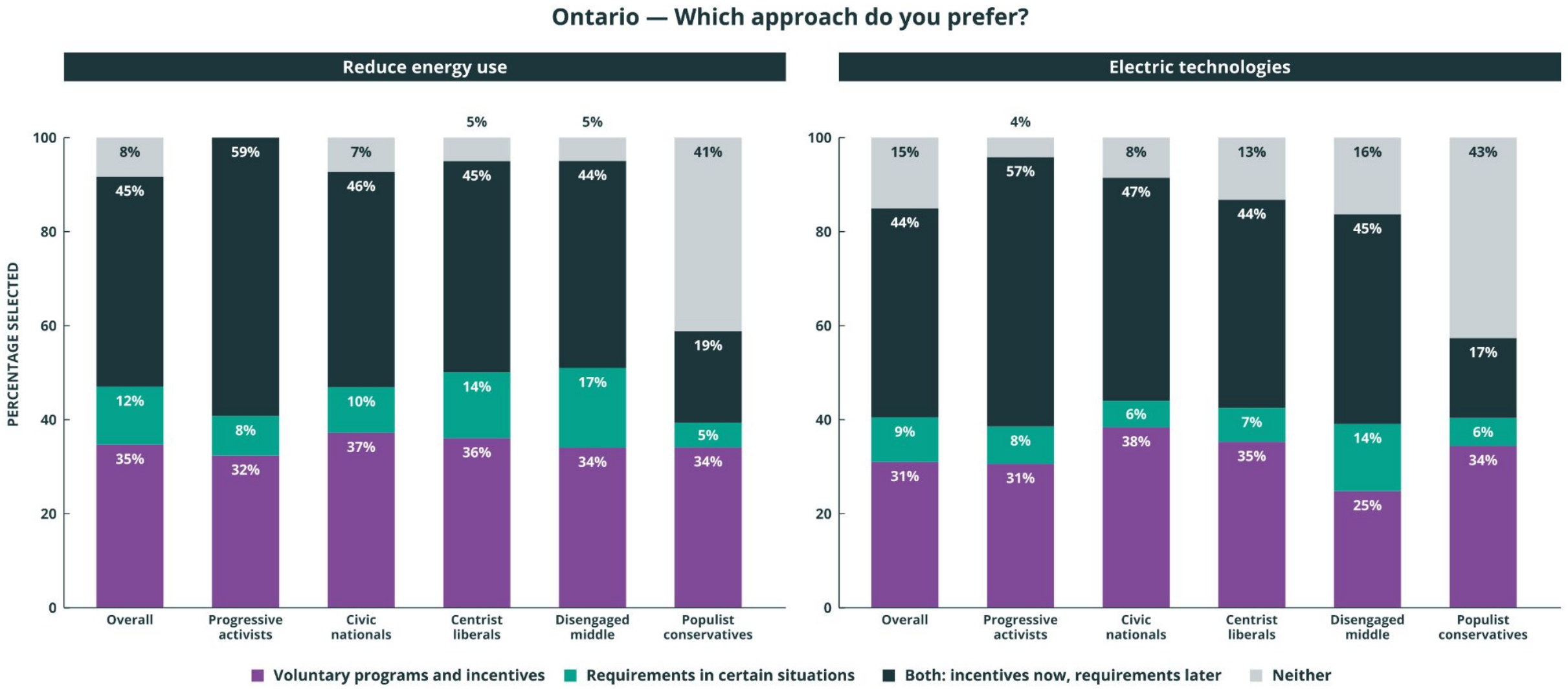
Moving ahead but with conditions (ON)



Incentives now, requirements later (BC)



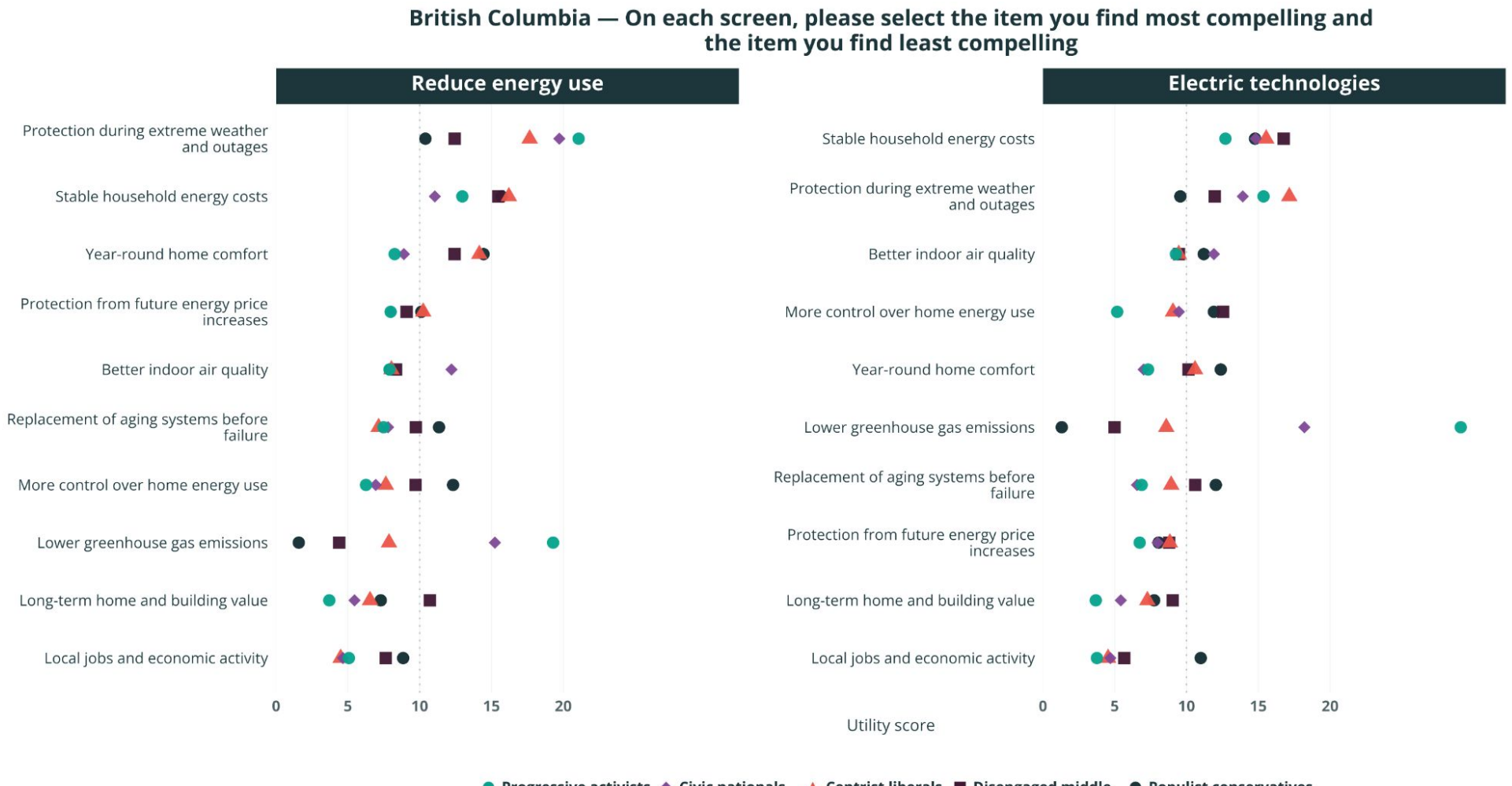
Incentives now, requirements later (ON)



Housing concerns by segment (BC)

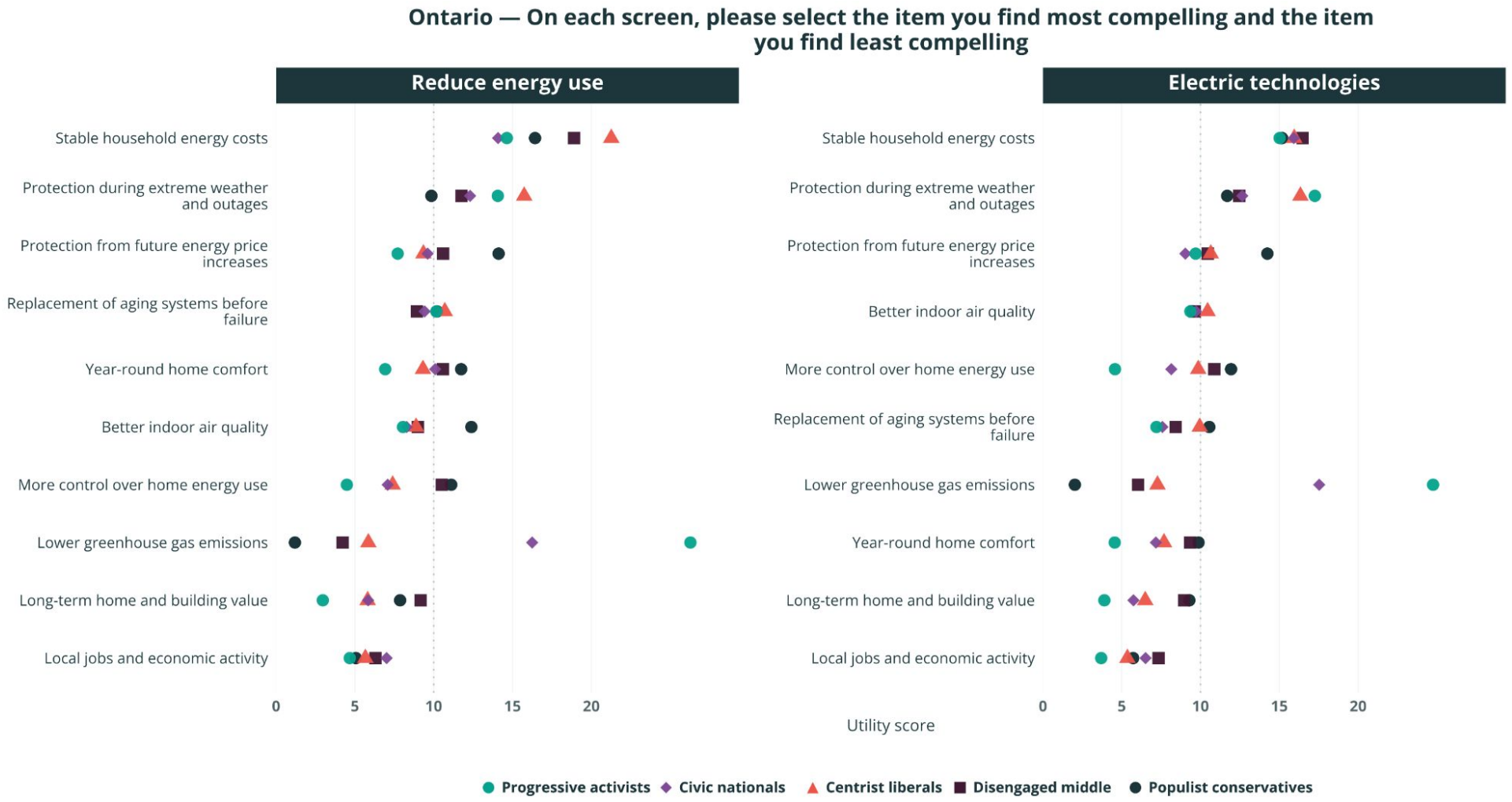
Housing concerns by segment (ON)

Housing benefits by segment (BC)



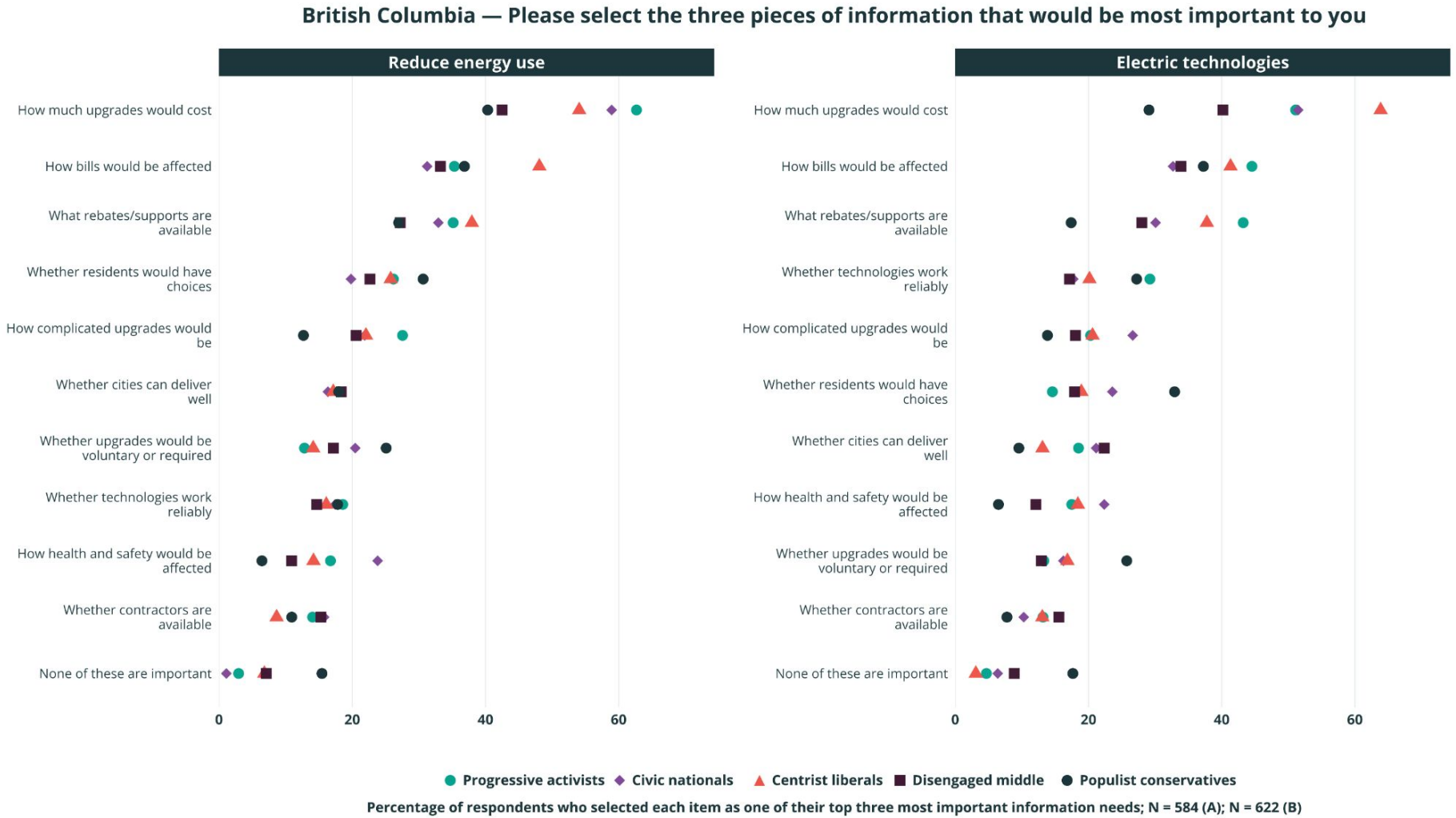
Utility scores sum to 100 within each condition. Average = 10. N by segment (A/B): PC = 55 / 61 | DM = 177 / 186 | CL = 120 / 137 | CN = 76 / 86 | PA = 160 / 154

Housing benefits by segment (ON)

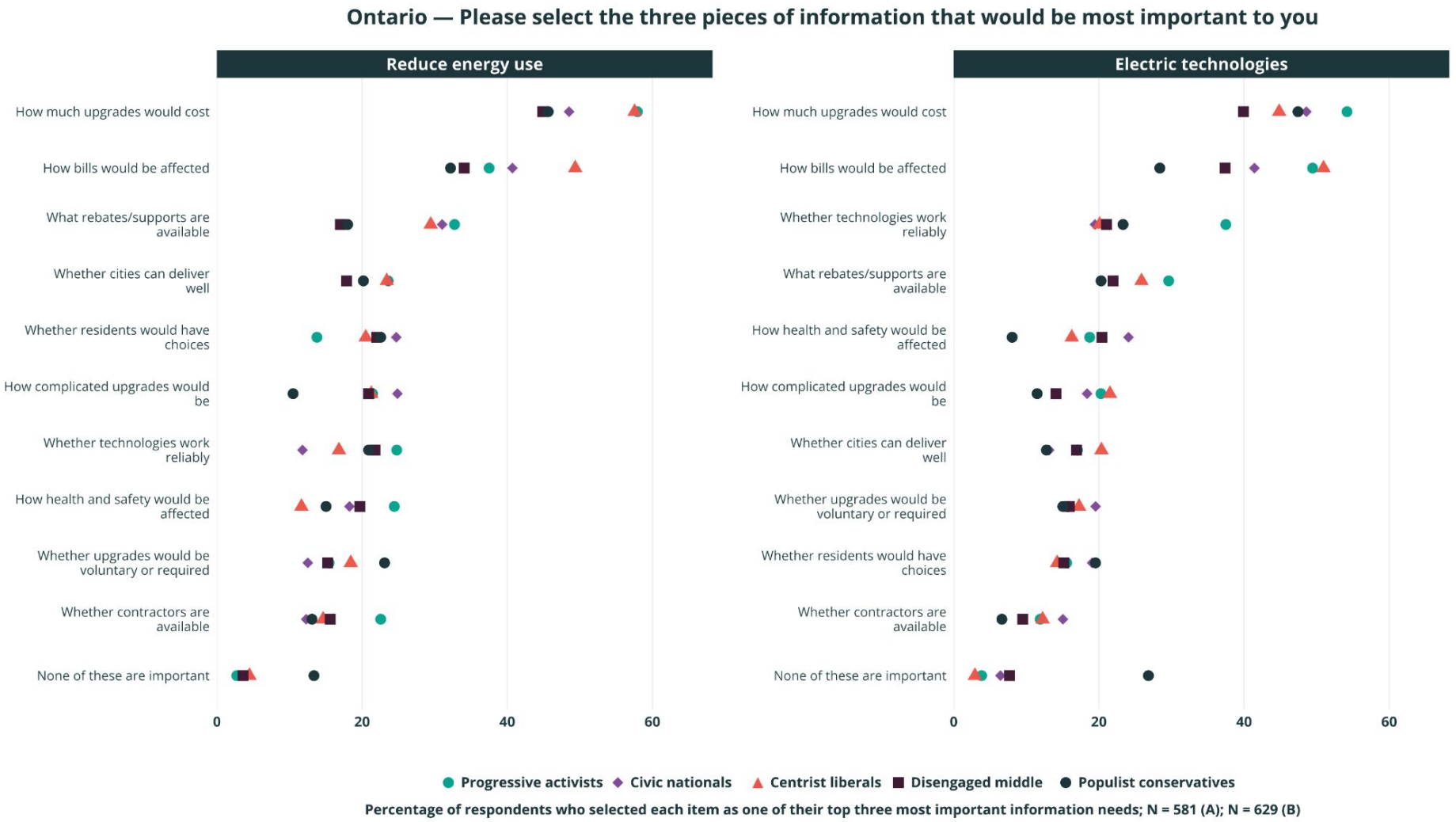


Utility scores sum to 100 within each condition. Average = 10. N by segment (A/B): PC = 65 / 79 | DM = 195 / 227 | CL = 135 / 125 | CN = 92 / 88 | PA = 108 / 124

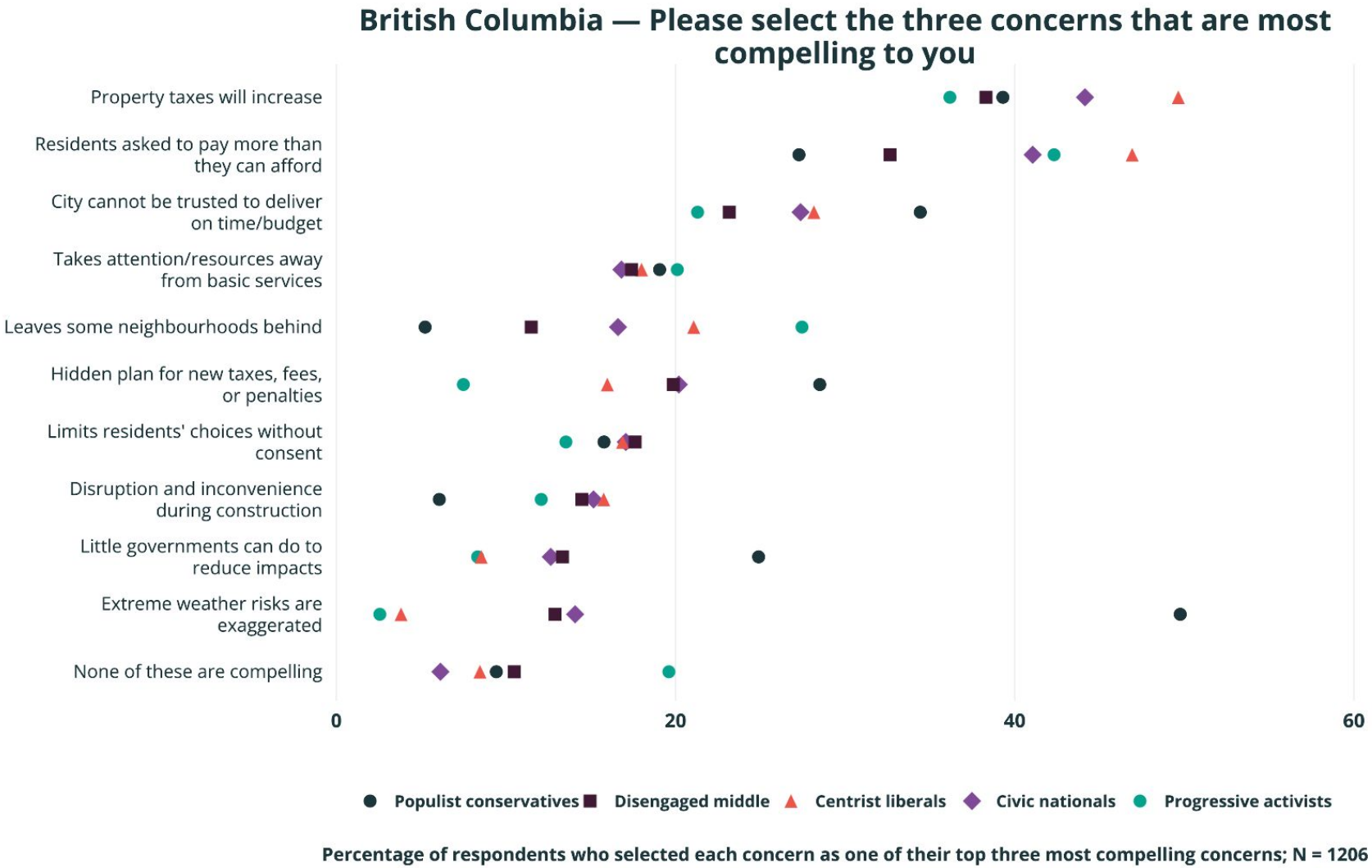
Housing info needs by segment (BC)



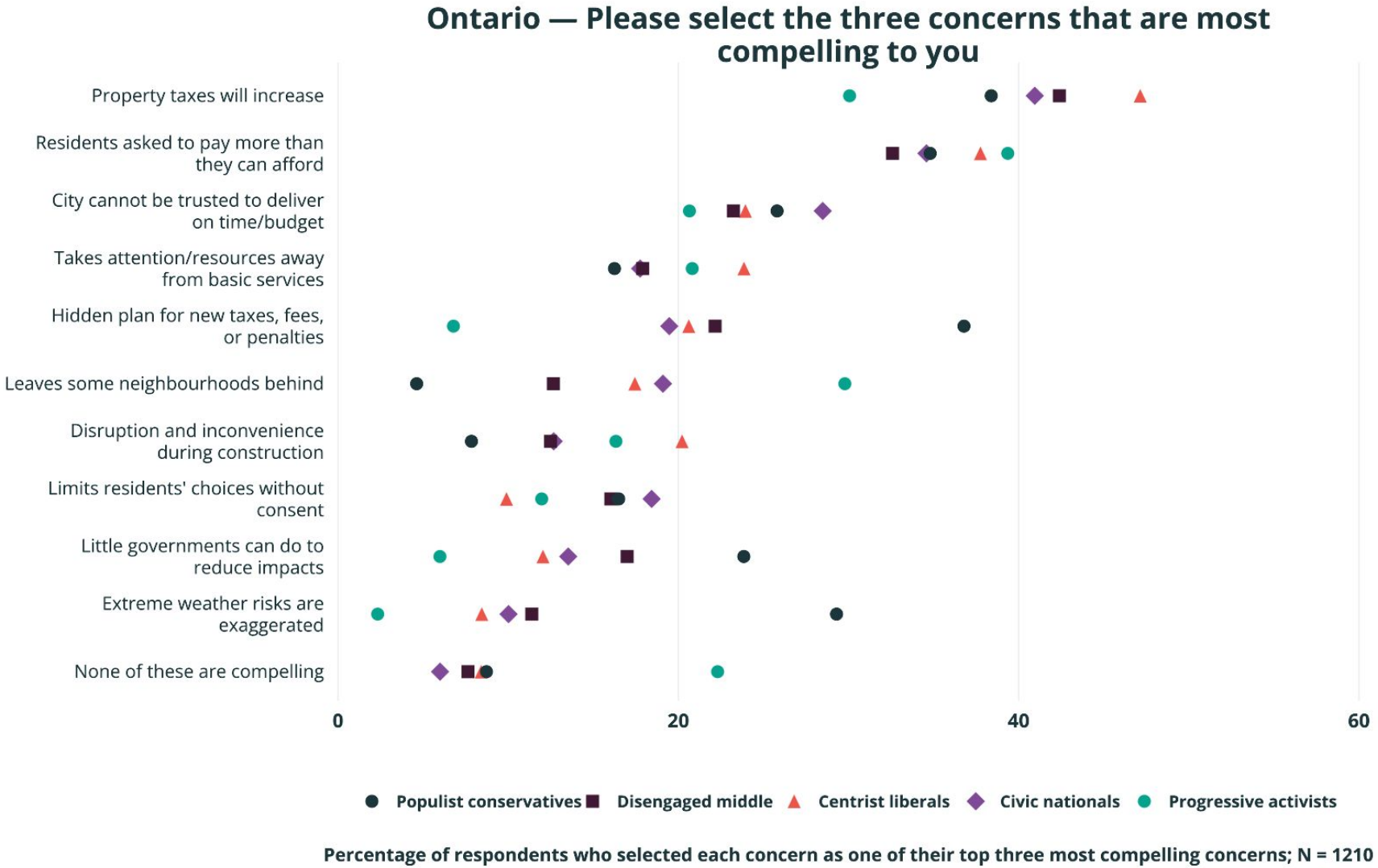
Housing info needs by segment (ON)



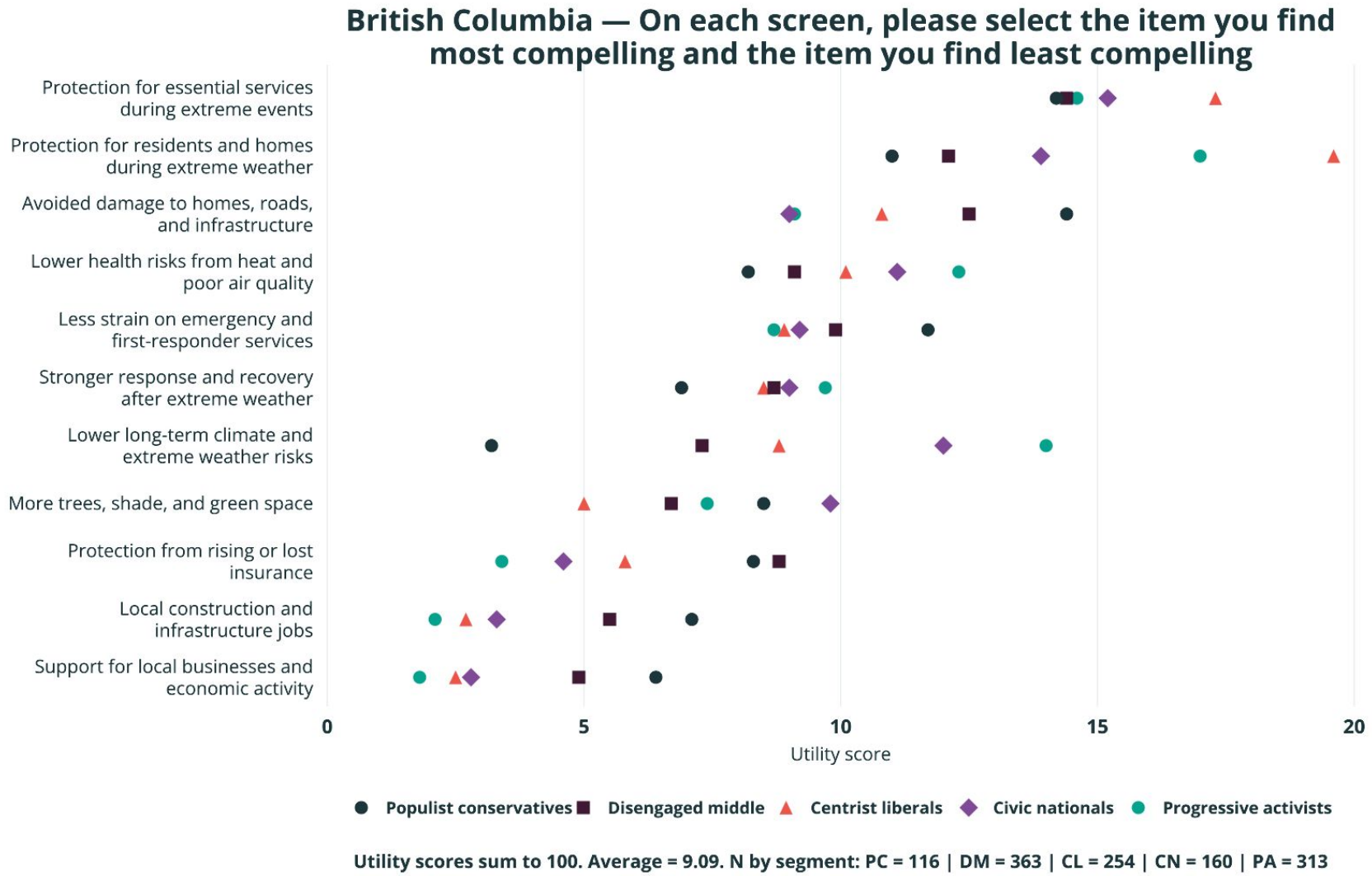
Adaptation concerns by segment (BC)



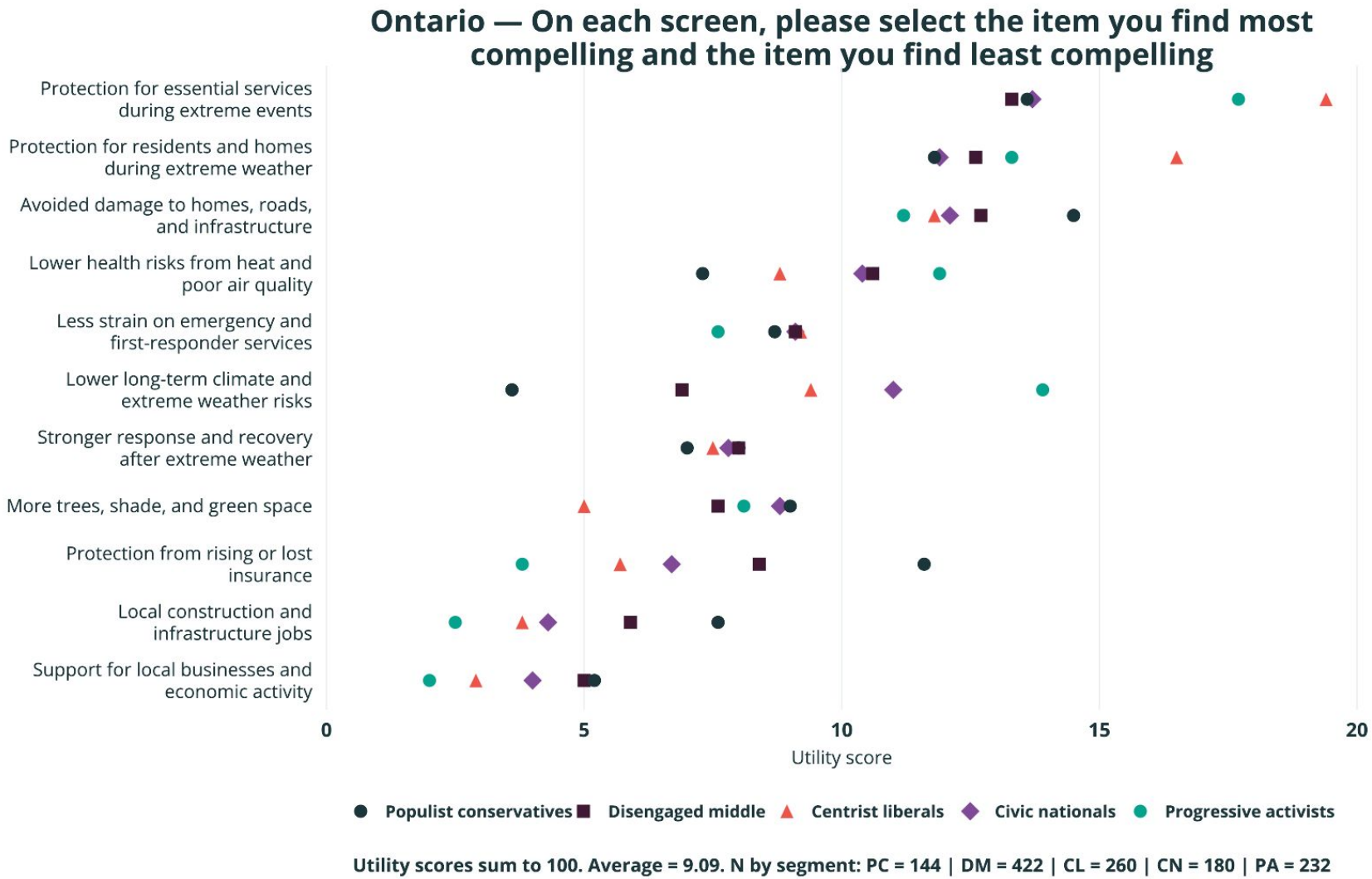
Adaptation concerns by segment (ON)



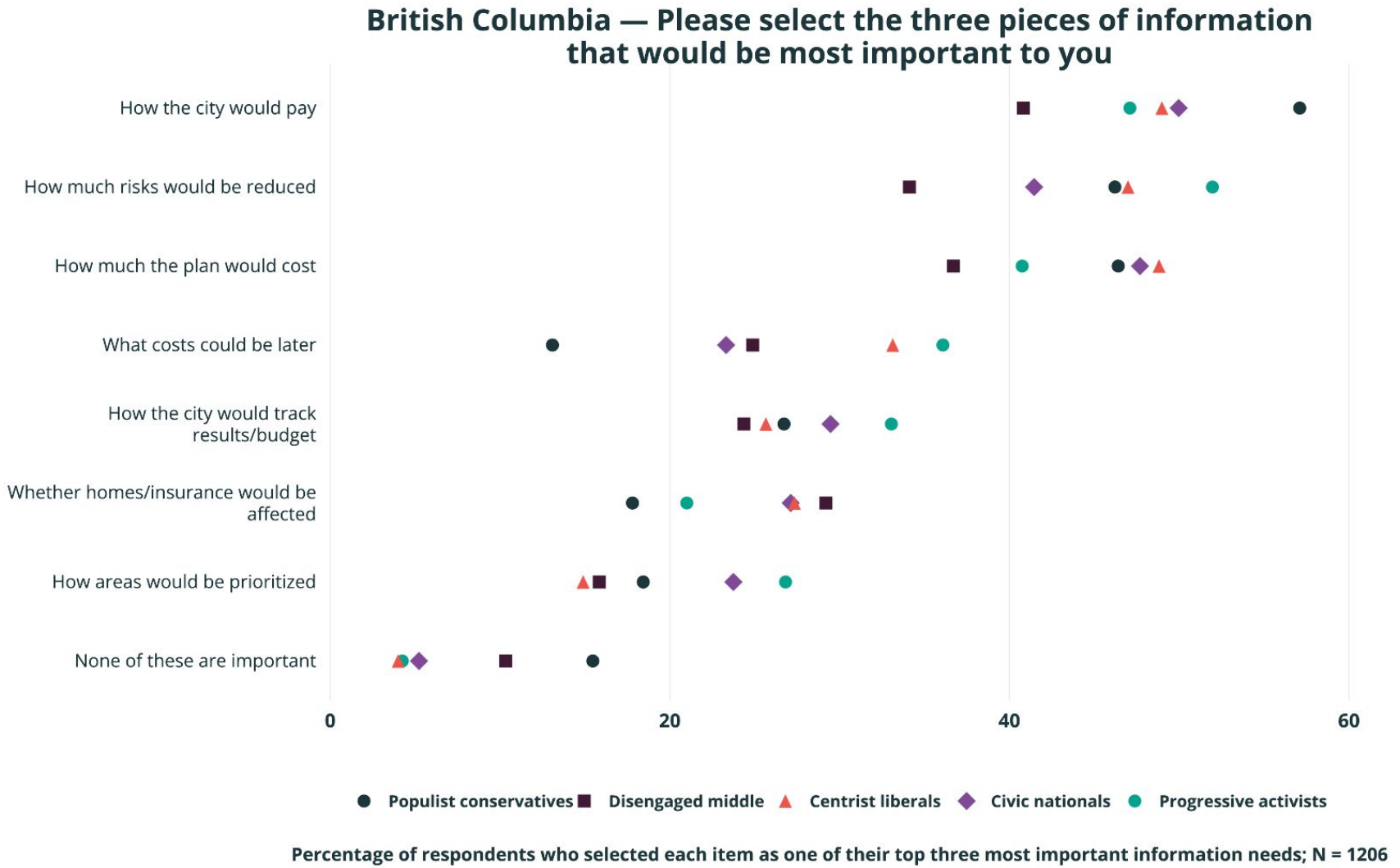
Adaptation benefits by segment (BC)



Adaptation benefits by segments (ON)

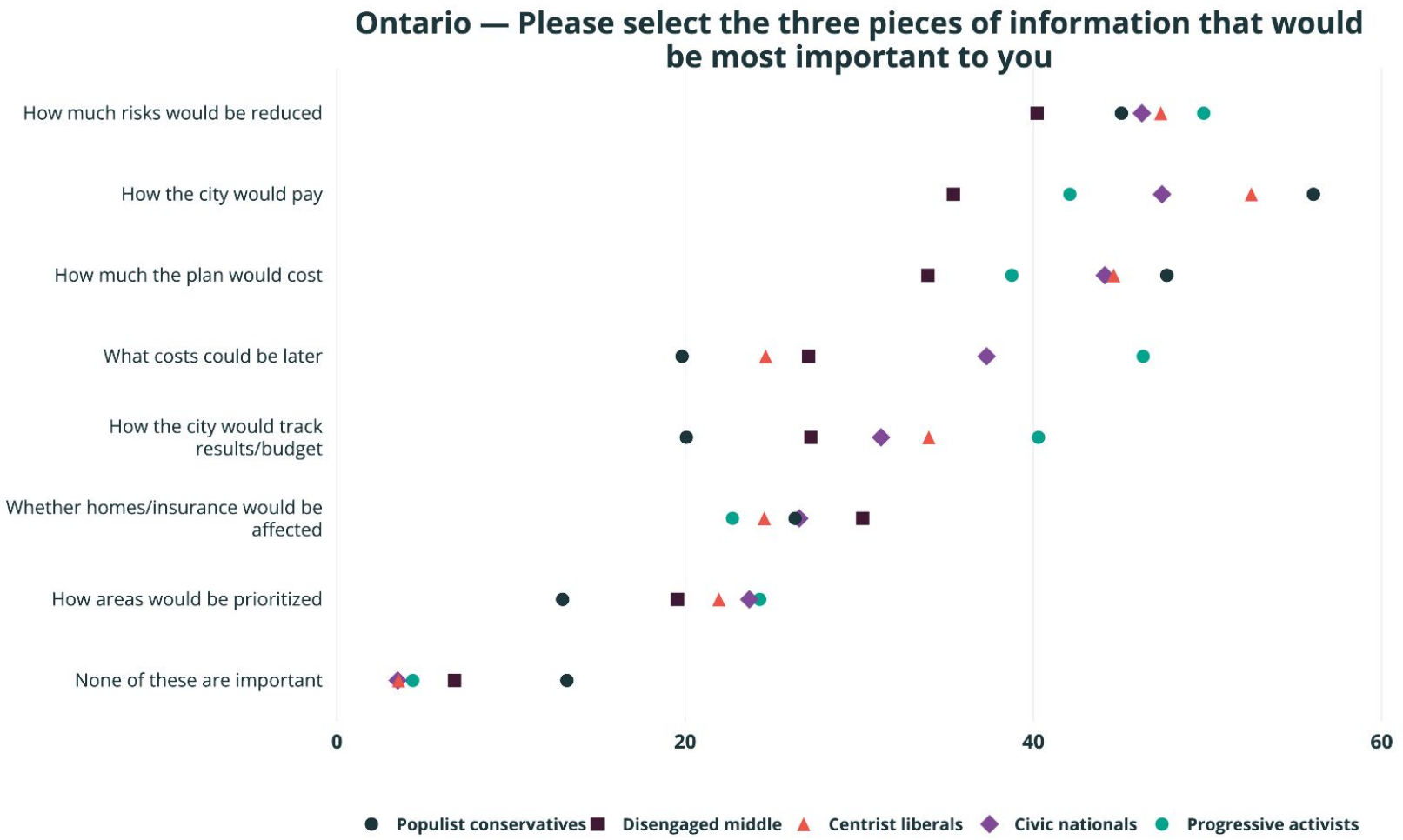


Adaptation info needs by segment (BC)



Percentage of respondents who selected each item as one of their top three most important information needs; N = 1206

Adaptation info needs by segment (ON)



Percentage of respondents who selected each item as one of their top three most important information needs; N = 1210

Communication map (BC)

	Reduce energy use	Electric technologies	Adaptation	Trusted messengers
Progressive activists	**Concern:** High upfront costs (52%) **Benefit:** Protection during extreme weather and outages (21.1) **Info:** How much upgrades would cost (63%)	**Concern:** High upfront costs (46%) **Benefit:** Lower greenhouse gas emissions (29.1) **Info:** How much upgrades would cost (51%)	**Concern:** Residents asked to pay more than they can afford (42%) **Benefit:** Protection for residents and homes during extreme weather (17.0) **Info:** How much risks would be reduced (52%)	Scientists (1.70); Fire / emergency services (1.54); BC Hydro (1.06)
Civic nationals	**Concern:** High upfront costs (54%) **Benefit:** Protection during extreme weather and outages (19.7) **Info:** How much upgrades would cost (59%)	**Concern:** High upfront costs (43%) **Benefit:** Lower greenhouse gas emissions (18.2) **Info:** How much upgrades would cost (51%)	**Concern:** Property taxes will increase (44%) **Benefit:** Protection for essential services during extreme events (15.2) **Info:** How the city would pay (50%)	Fire / emergency services (1.46); Scientists (1.32); BC Hydro (1.01)
Centrist liberals	**Concern:** High upfront costs (43%) **Benefit:** Protection during extreme weather and outages (17.7) **Info:** How much upgrades would cost (54%)	**Concern:** High upfront costs (42%) **Benefit:** Protection during extreme weather and outages (17.2) **Info:** How much upgrades would cost (64%)	**Concern:** Property taxes will increase (50%) **Benefit:** Protection for residents and homes during extreme weather (19.6) **Info:** How the city would pay (49%)	Fire / emergency services (1.44); Scientists (1.34); BC Hydro (1.03)
Disengaged middle	**Concern:** High upfront costs (32%) **Benefit:** Stable household energy costs (15.5) **Info:** How much upgrades would cost (43%)	**Concern:** Residents should choose for themselves (32%) **Benefit:** Stable household energy costs (16.8) **Info:** How much upgrades would cost (40%)	**Concern:** Property taxes will increase (38%) **Benefit:** Protection for essential services during extreme events (14.4) **Info:** How the city would pay (41%)	Fire / emergency services (1.02); Scientists (0.83); Friends / family / neighbours (0.81)
Populist conservatives	**Concern:** Residents should choose for themselves (54%) **Benefit:** Stable household energy costs (15.7) **Info:** How much upgrades would cost (40%)	**Concern:** Residents should choose for themselves (49%) **Benefit:** Stable household energy costs (14.8) **Info:** How bills would be affected (37%)	**Concern:** Extreme weather risks are exaggerated (50%) **Benefit:** Avoided damage to homes, roads, and infrastructure (14.4) **Info:** How the city would pay (57%)	Fire / emergency services (1.15); Friends / family / neighbours (0.97); FortisBC (0.34)

Concerns/info show % selected; benefits show MaxDiff utility scores; messengers show mean trust scores.

Communication map (ON)

	Reduce energy use	Electric technologies	Adaptation	Trusted messengers
Progressive activists	**Concern:** High upfront costs (39%) **Benefit:** Lower greenhouse gas emissions (26.3) **Info:** How much upgrades would cost (58%)	**Concern:** Electric grid may be strained (41%) **Benefit:** Lower greenhouse gas emissions (24.8) **Info:** How much upgrades would cost (54%)	**Concern:** Residents asked to pay more than they can afford (39%) **Benefit:** Protection for essential services during extreme events (17.7) **Info:** How much risks would be reduced (50%)	Scientists (1.70); Fire / emergency services (1.45); Environmental groups (1.09)
Civic nationals	**Concern:** Residents should choose for themselves (38%) **Benefit:** Lower greenhouse gas emissions (16.2) **Info:** How much upgrades would cost (49%)	**Concern:** High upfront costs (32%) **Benefit:** Lower greenhouse gas emissions (17.5) **Info:** How much upgrades would cost (49%)	**Concern:** Property taxes will increase (41%) **Benefit:** Protection for essential services during extreme events (13.7) **Info:** How the city would pay (47%)	Fire / emergency services (1.49); Scientists (1.35); Friends / family / neighbours (0.98)
Centrist liberals	**Concern:** High upfront costs (47%) **Benefit:** Stable household energy costs (21.3) **Info:** How much upgrades would cost (58%)	**Concern:** High upfront costs (36%) **Benefit:** Protection during extreme weather and outages (16.3) **Info:** How bills would be affected (51%)	**Concern:** Property taxes will increase (47%) **Benefit:** Protection for essential services during extreme events (19.4) **Info:** How the city would pay (53%)	Fire / emergency services (1.36); Scientists (1.20); Friends / family / neighbours (0.95)
Disengaged middle	**Concern:** Residents should choose for themselves (35%) **Benefit:** Stable household energy costs (18.9) **Info:** How much upgrades would cost (45%)	**Concern:** Cities should focus on affordability (32%) **Benefit:** Stable household energy costs (16.5) **Info:** How much upgrades would cost (40%)	**Concern:** Property taxes will increase (42%) **Benefit:** Protection for essential services during extreme events (13.3) **Info:** How much risks would be reduced (40%)	Fire / emergency services (1.03); Friends / family / neighbours (0.89); Scientists (0.82)
Populist conservatives	**Concern:** Residents should choose for themselves (46%) **Benefit:** Stable household energy costs (16.4) **Info:** How much upgrades would cost (46%)	**Concern:** Cities should focus on affordability (32%) **Benefit:** Stable household energy costs (15.2) **Info:** How much upgrades would cost (47%)	**Concern:** Property taxes will increase (38%) **Benefit:** Avoided damage to homes, roads, and infrastructure (14.5) **Info:** How the city would pay (56%)	Fire / emergency services (1.05); Friends / family / neighbours (0.83); Scientists (0.13)

Segment-specific results. Concerns/info show % selected; benefits show MaxDiff utility scores; messengers show mean trust scores.