



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

June 9, 2026



Presentation agenda

- Welcome, project overview
- 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

- 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.

Quantitative survey 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?

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
- **Geo-targeted sampling from GTHA**
 - Ajax
 - Aurora
 - Brampton
 - Brock
 - Burlington
 - Caledon
 - Clarington
 - East Gwillimbury
 - Georgina
 - Halton Hills
 - Hamilton
 - King
 - Markham
 - Milton
 - Mississauga
 - Newmarket
 - Oakville
 - Oshawa
 - Pickering
 - Richmond Hill
 - Scugog
 - Toronto
 - Uxbridge
 - Vaughan
 - Whitby
 - Whitchurch-Stouffville

What we found

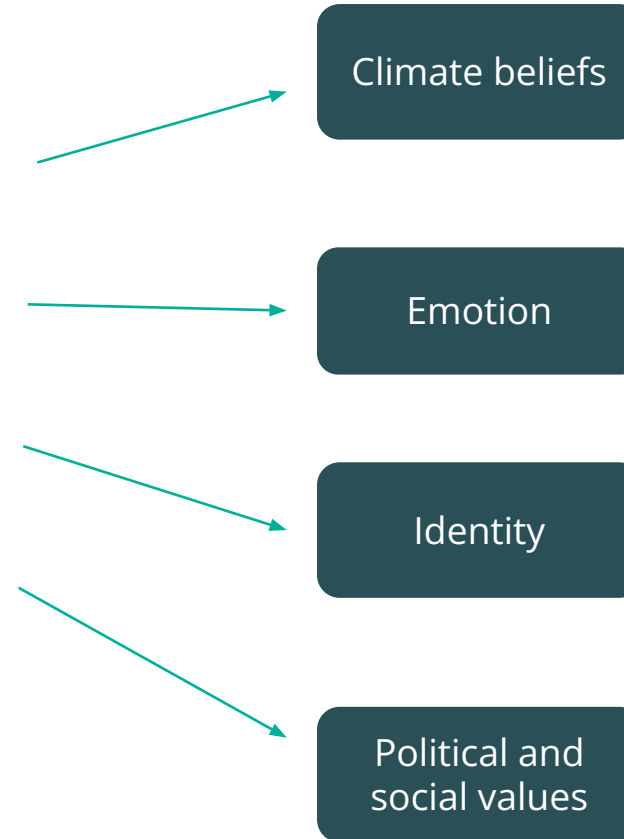
1. Support for municipal climate action exists, but it is conditional
2. Residents evaluate climate policies through a practical household lens.
3. Protection and stability outperform other diffuse benefits.
4. Electrification raises concerns about reliability, cost, and choice.
5. Middle audiences are pragmatic and persuadable.
6. Trust in implementation is as important as policy design.

Audiences

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



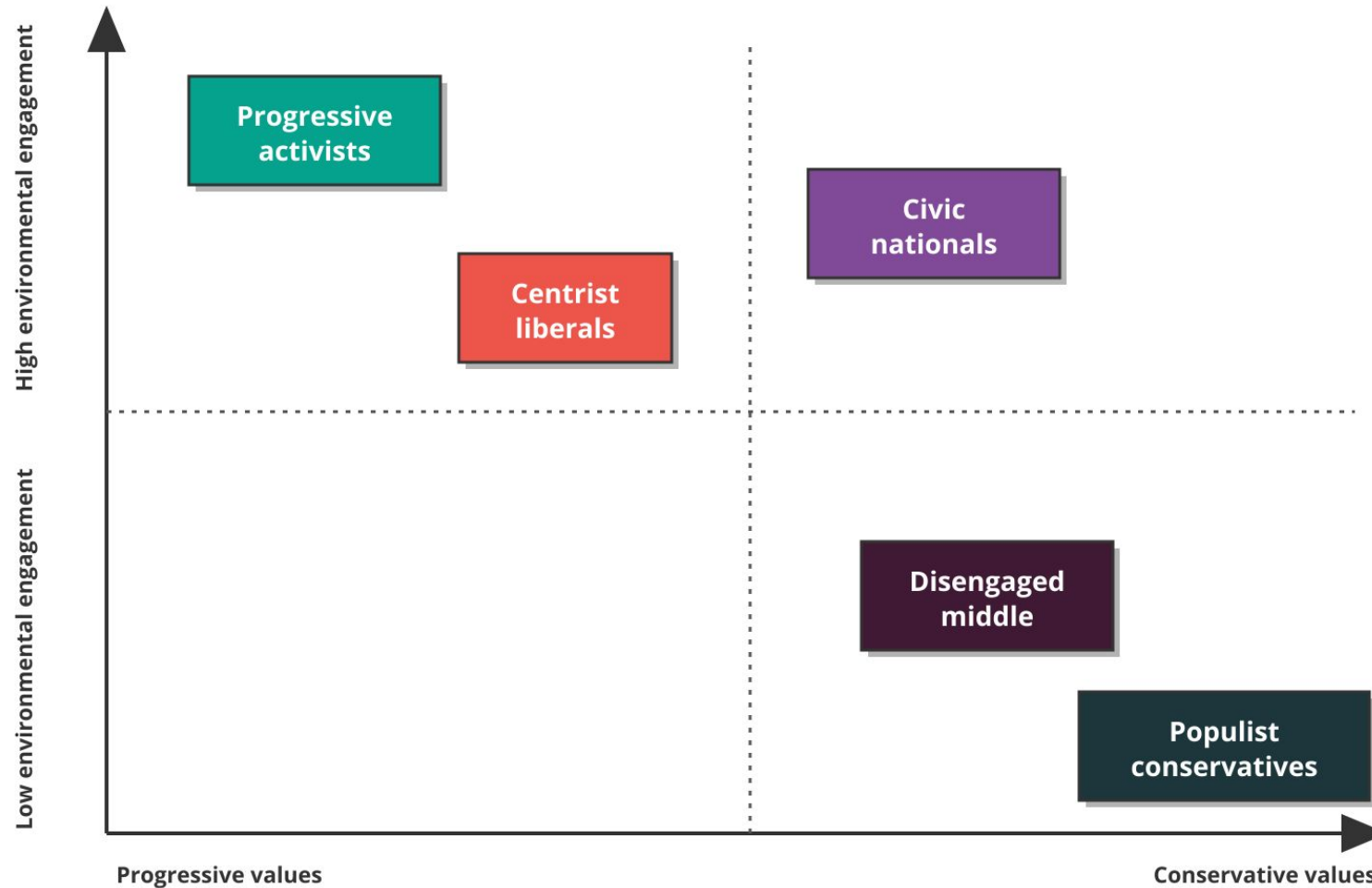
The Five Canadas of Urban ON

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



Percentages indicate proportion of respondents in each segment

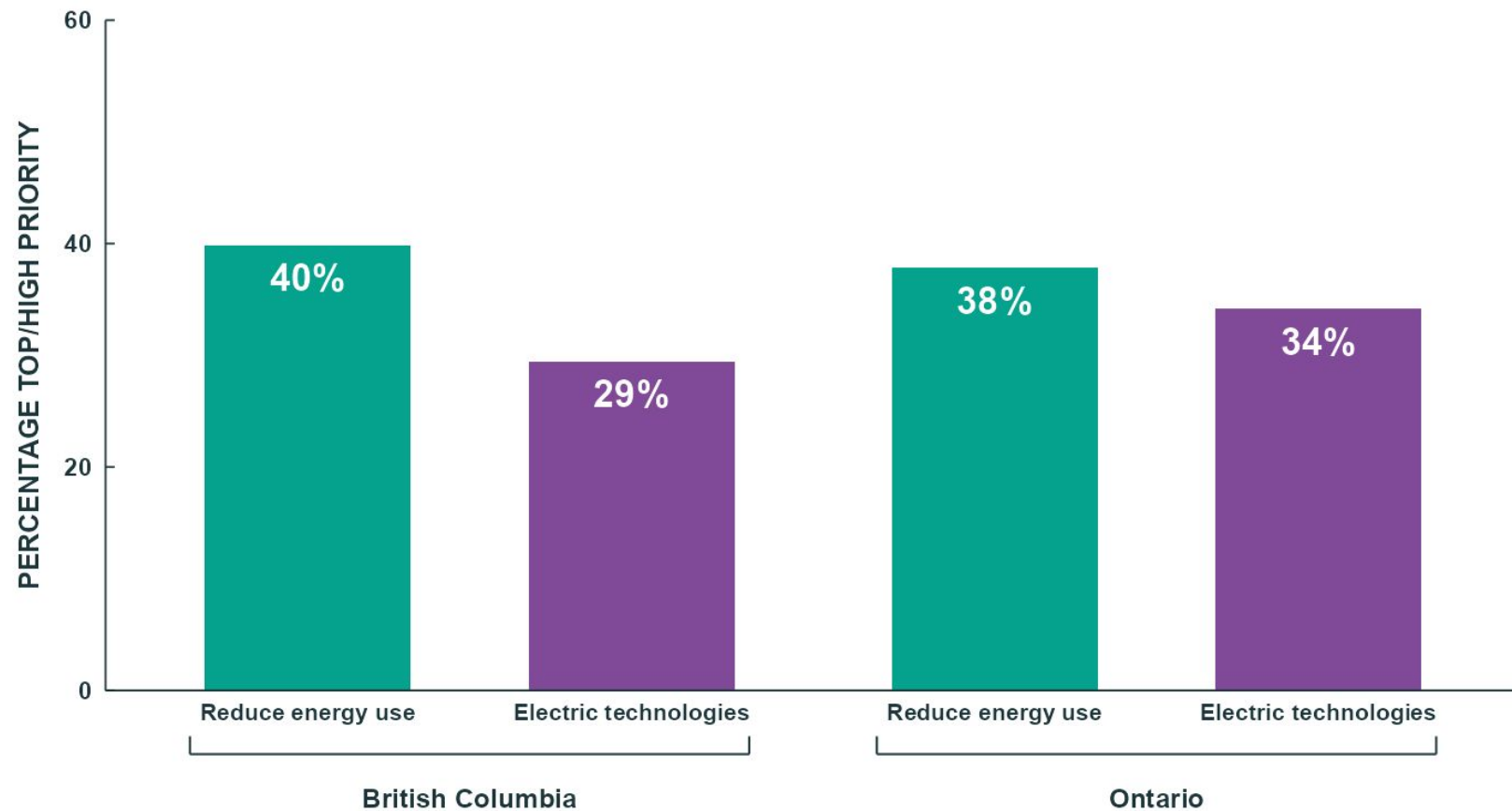
Political and environmental values



Housing decarbonization

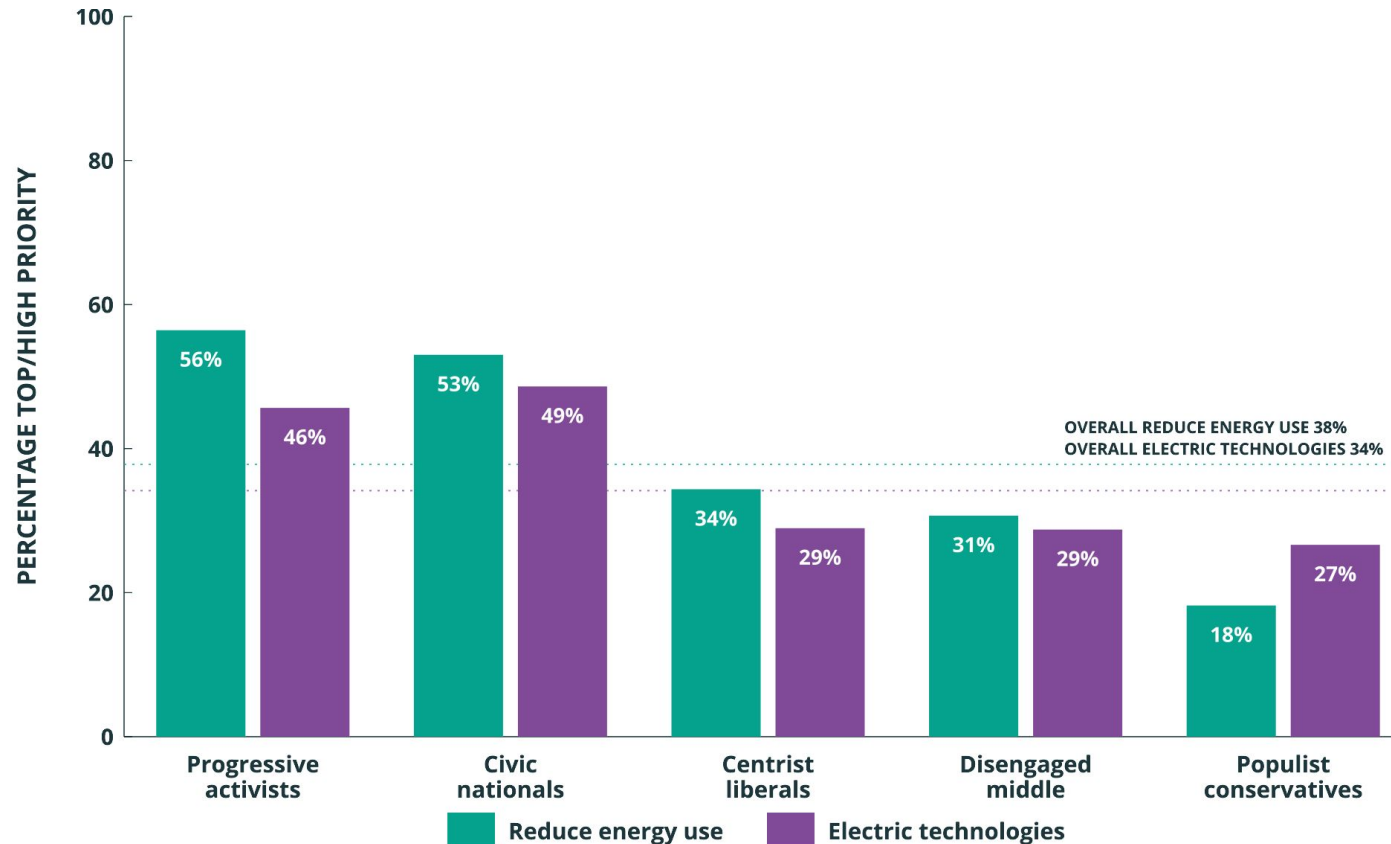
Support for electrification vs. energy efficiency

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



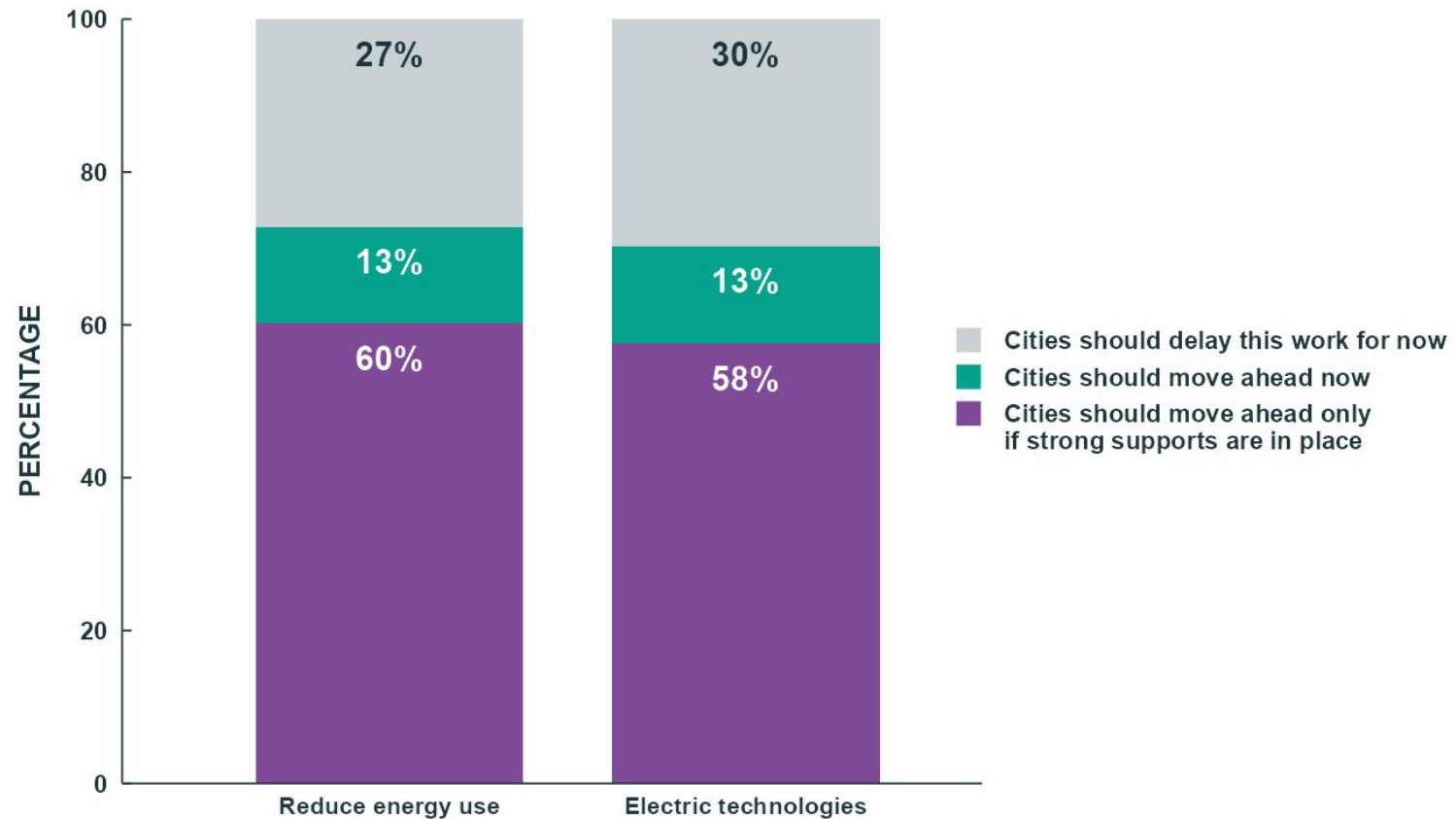
Support for upgrading homes and buildings varies across groups

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

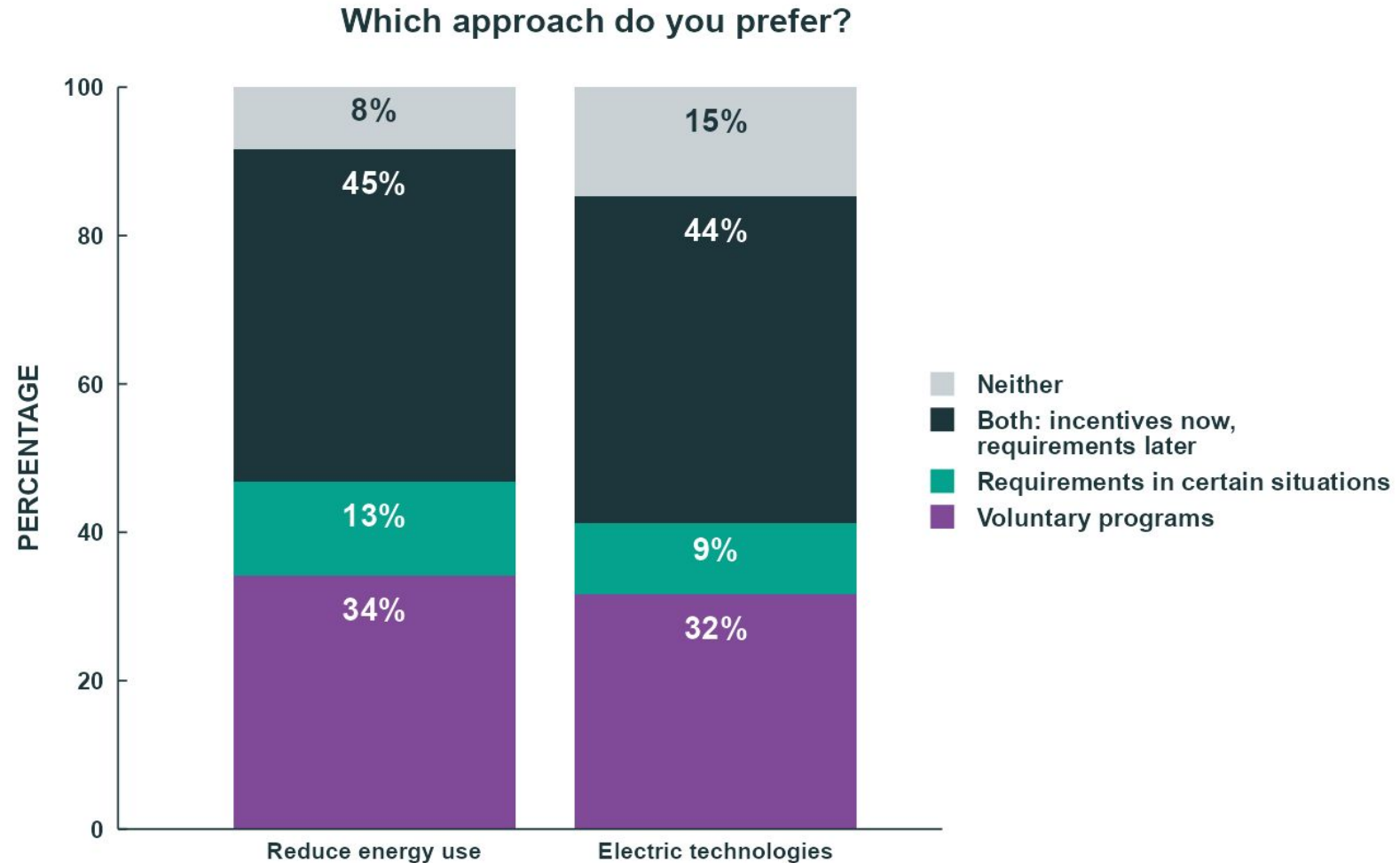


Support for housing decarbonization is conditional

Considering rising costs and other urgent pressures, which statement comes closest to your view?



Incentives now, requirements later



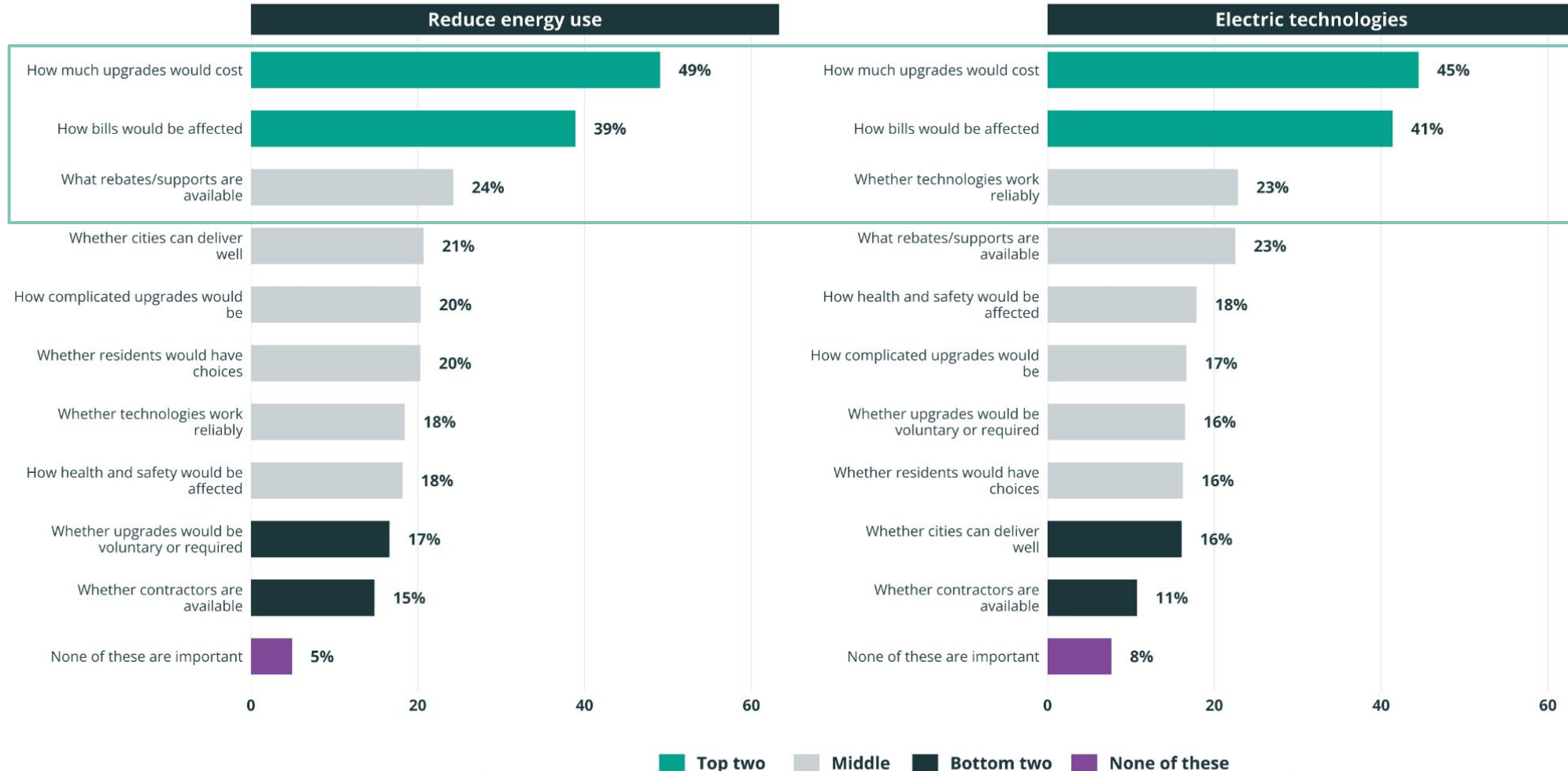
What do residents want to know?

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?

Ontario — Please select the three pieces of information that would be most important to you



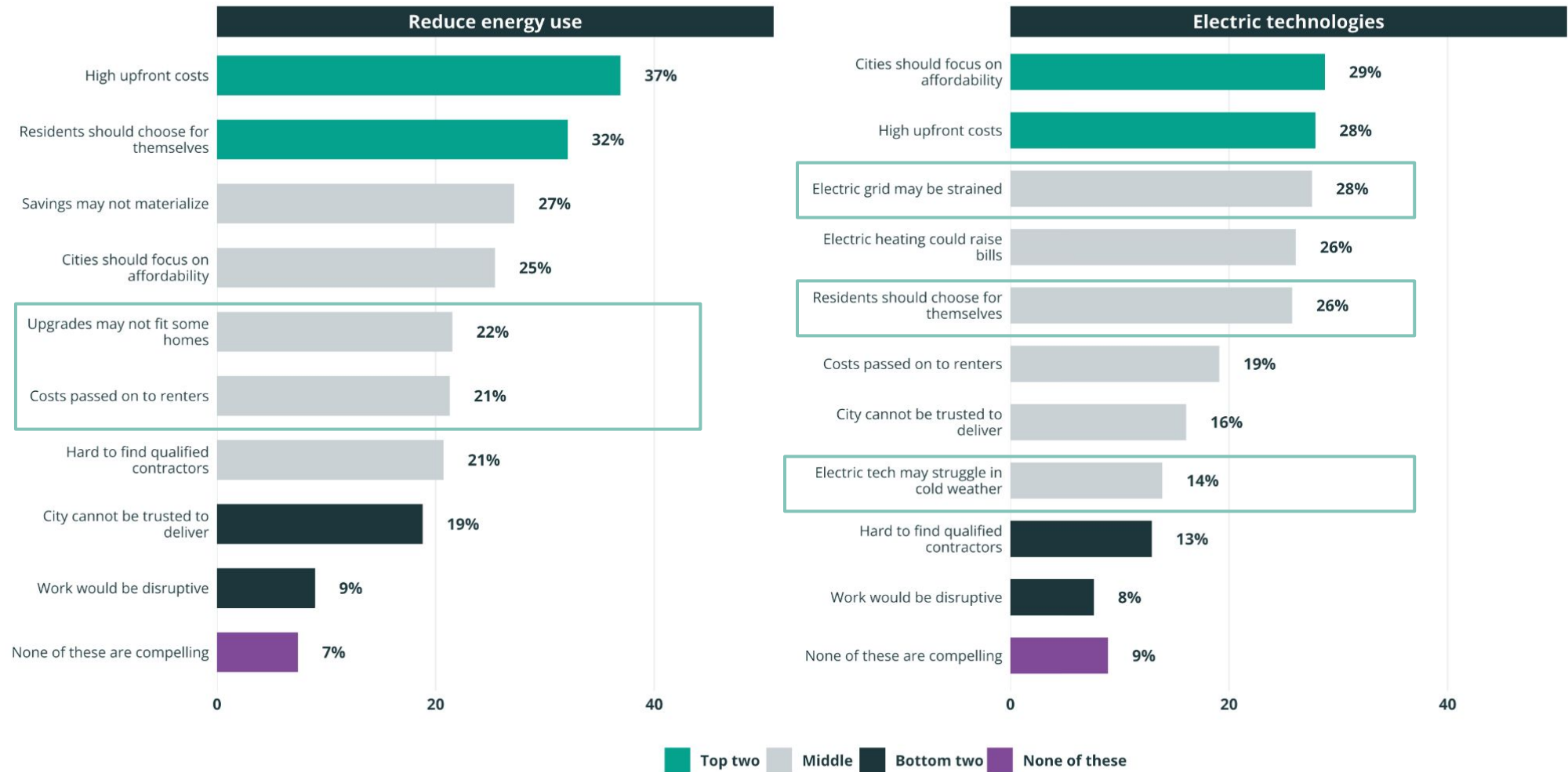
Percentage of respondents who selected each item as one of their top three most important information needs; N = 649 (A); N = 684 (B)
 Percentage of respondents who selected each item as one of their top three most important information needs; N = 649 (A); N = 684 (B)

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 | | | | |

ON residents as concerned about reliability and choice as affordability

Ontario — Please select the three concerns that are most compelling to you



Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 649 (A); N = 684 (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.

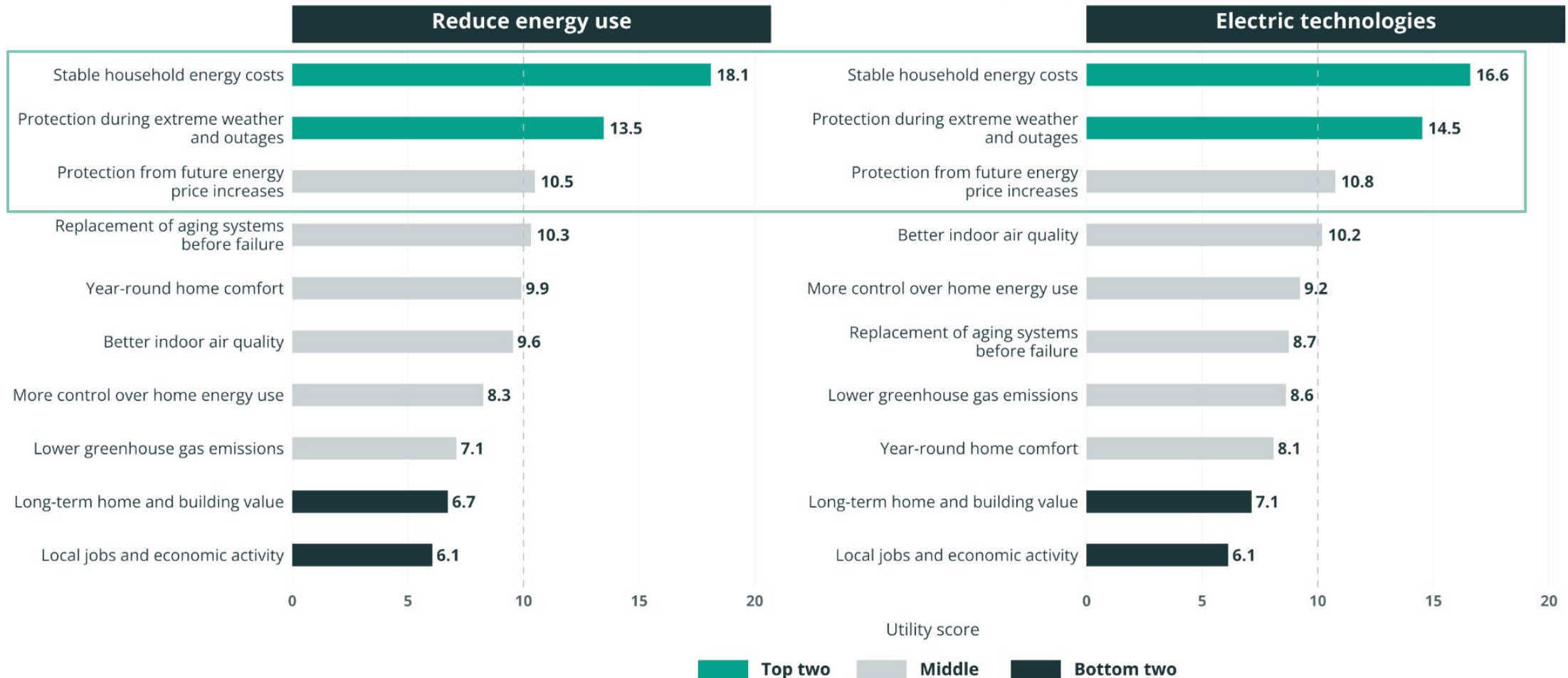
- **Cost:** Keeps household energy costs more stable over time
- **Predictability:** Reduces exposure to future increases in energy prices
- **Value:** Maintains the long-term value of homes and buildings
- **Modernization:** Replaces aging systems before they fail
- **Safety:** Protects residents during 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 $100/\text{number of attributes}$.
 - 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.

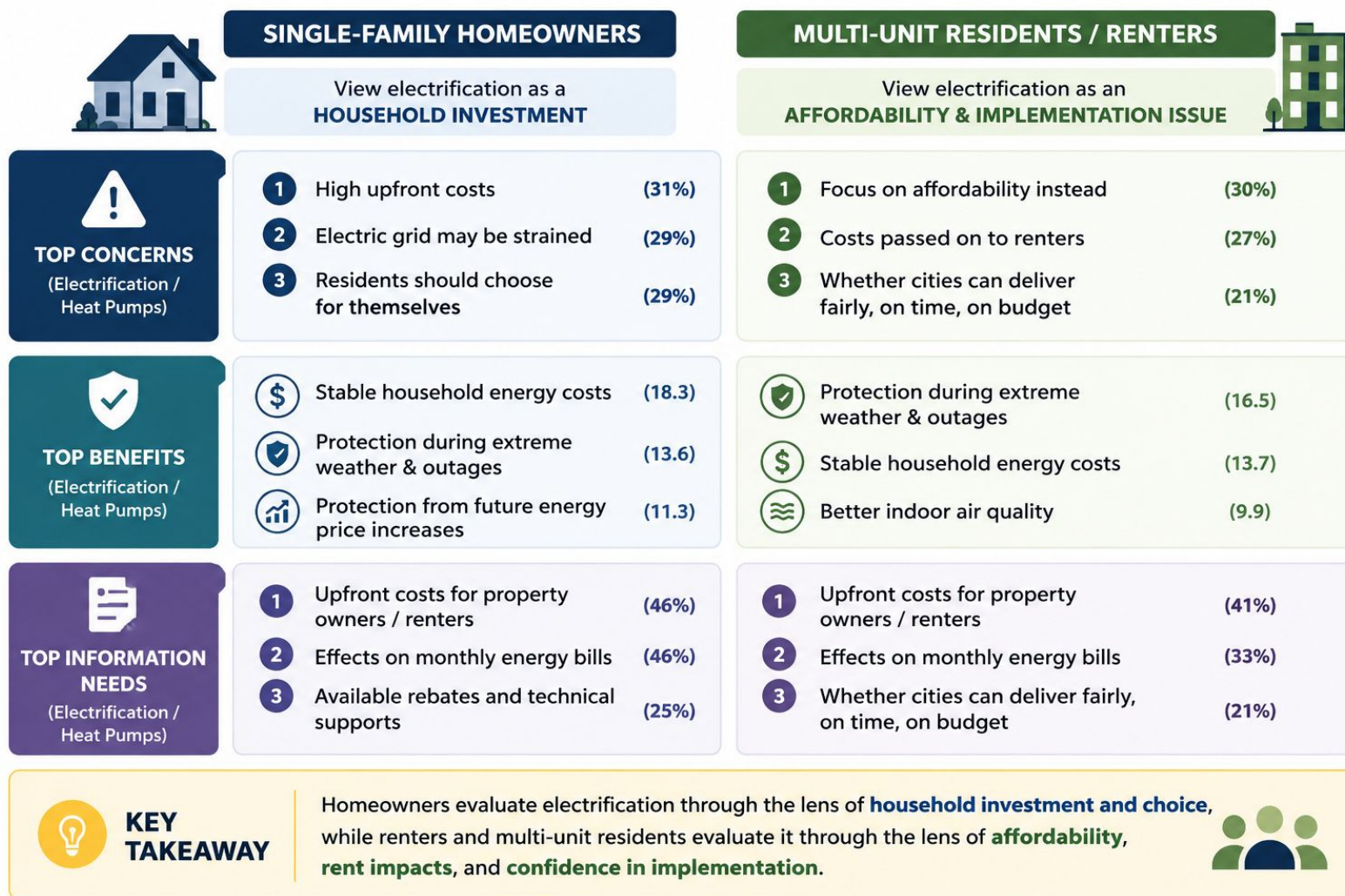
Protection and price stability

Ontario — On each screen, please select the item you find most compelling and the item you find least compelling



Utility scores sum to 100 within each condition. Average = 10. N = 663 (A), 701 (B).

Housing type shapes views of housing decarbonization



Housing highlights

- Residents are open to housing decarbonization, but support depends on cost, reliability, and choice.
- Residents evaluate housing decarbonization through a practical household lens.
- The most persuasive benefits are financial and protective.
- Support for municipal action exists, but is conditional.
- Electrification raises distinct concerns around reliability and performance.
- Homeowners and multi-unit residents evaluate policies differently and may require different comms.
- Overall:
 - There is space for municipal action, but support is conditional.
 - Residents want reassurance about costs and implementation.
 - The largest segment of the public appears pragmatic rather than opposed.

Adaptation & Preparedness

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

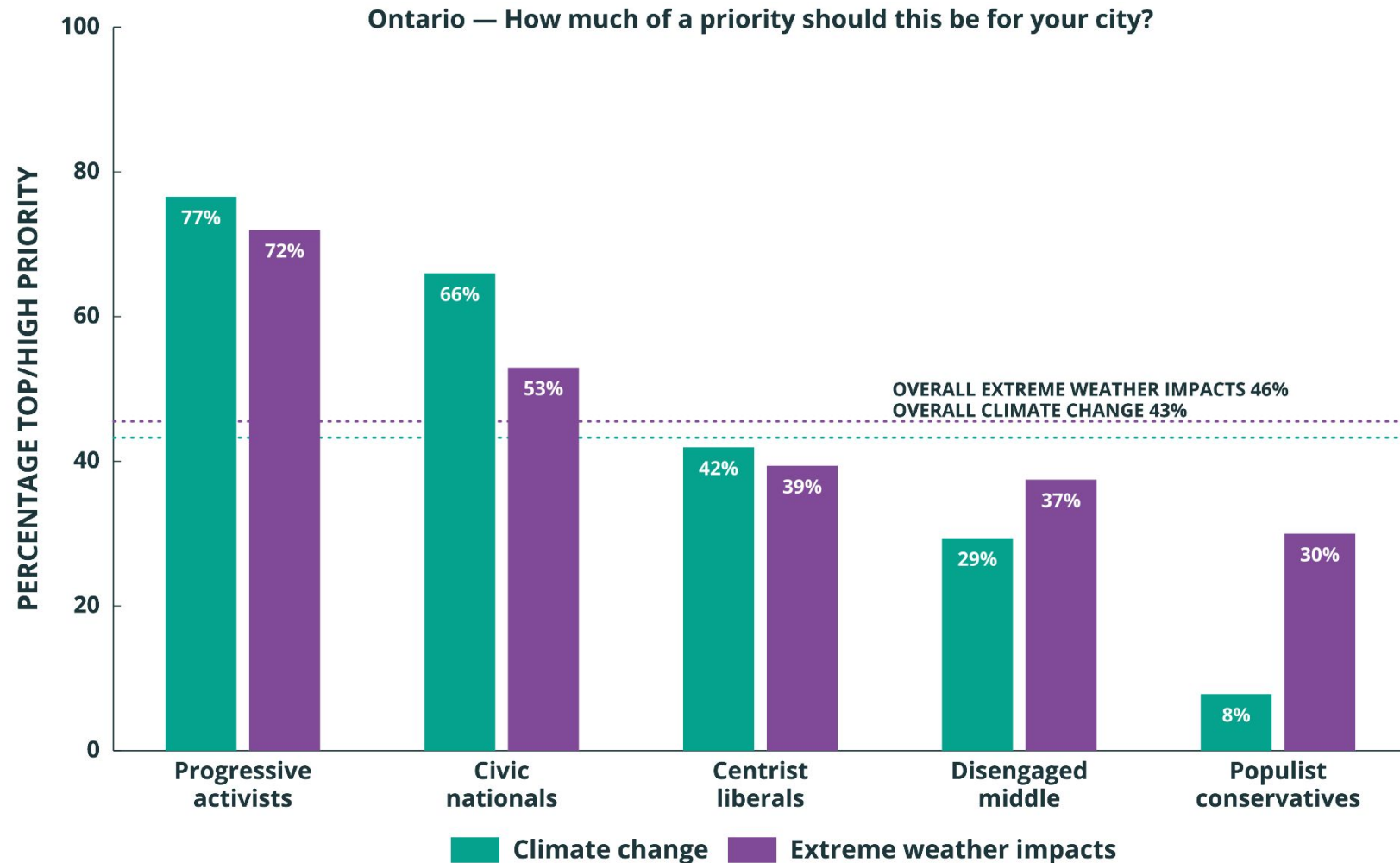
Scientists say *climate change* / *extreme weather* is driving up infrastructure, insurance, and repair costs for communities across Canada.

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

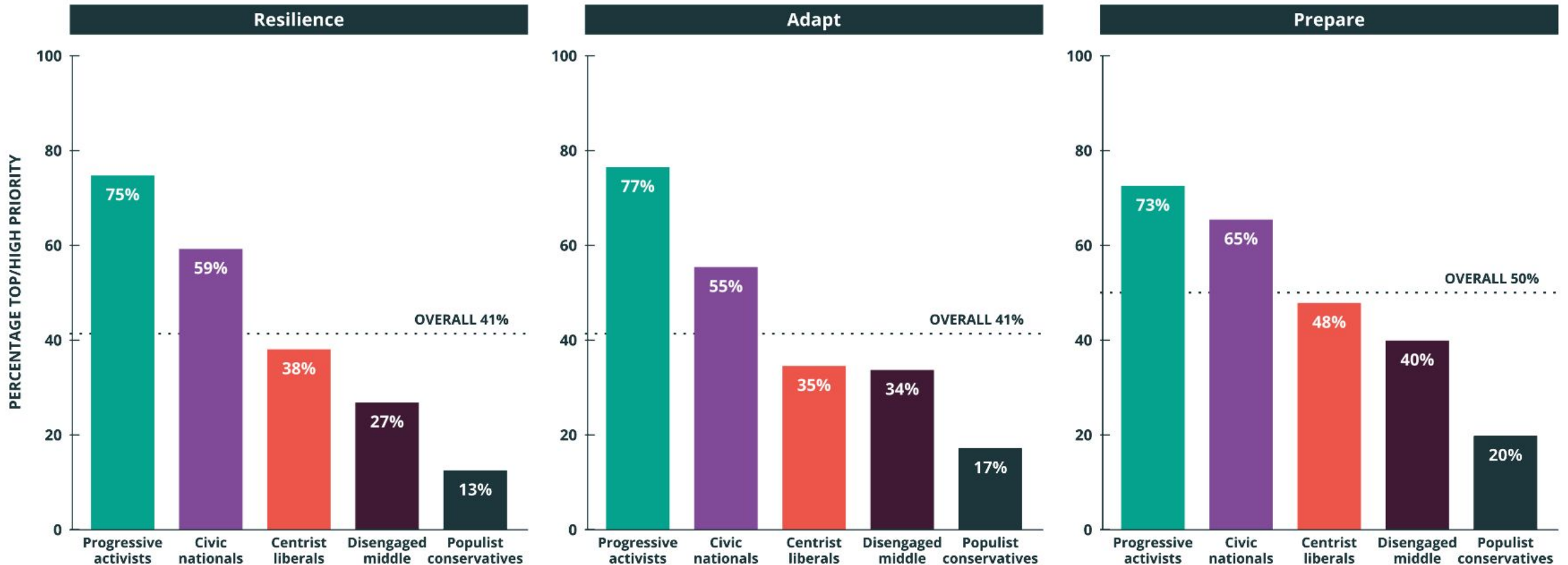
[...help your community **adapt** to /
...increase your community's **resilience** to /
...better **prepare** your community for]

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



Prepare outperforms resilience AND adapt for most audiences

Ontario — How much of a priority should this be for your city?



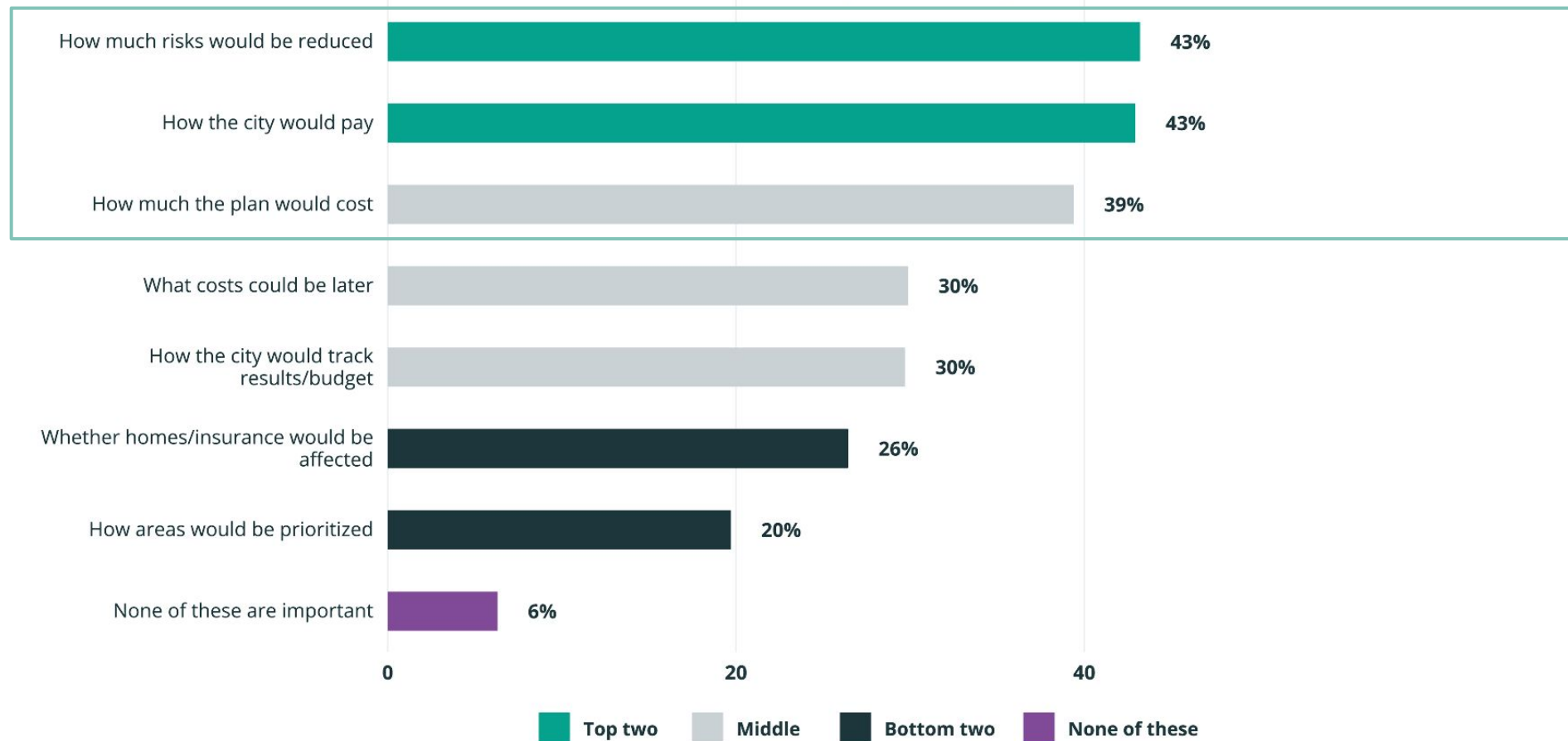
What do residents want to know?

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

Ontario — Please select the three pieces of information that would be most important to you



Percentage of respondents who selected each item as one of their top three most important information needs; N = 1333

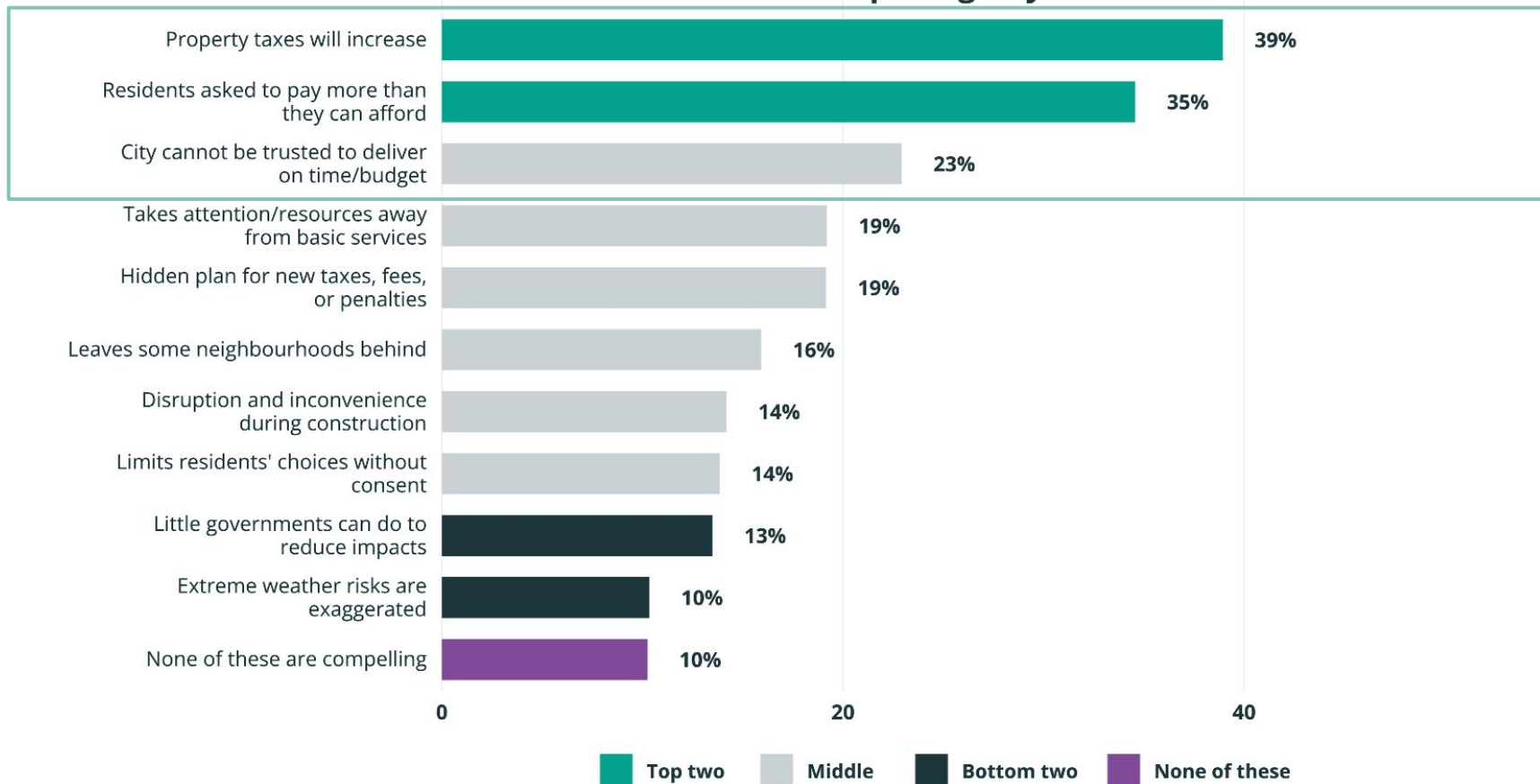
Which opposition frames have traction?

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

Ontario — Please select the three concerns that are most compelling to you



Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 1333

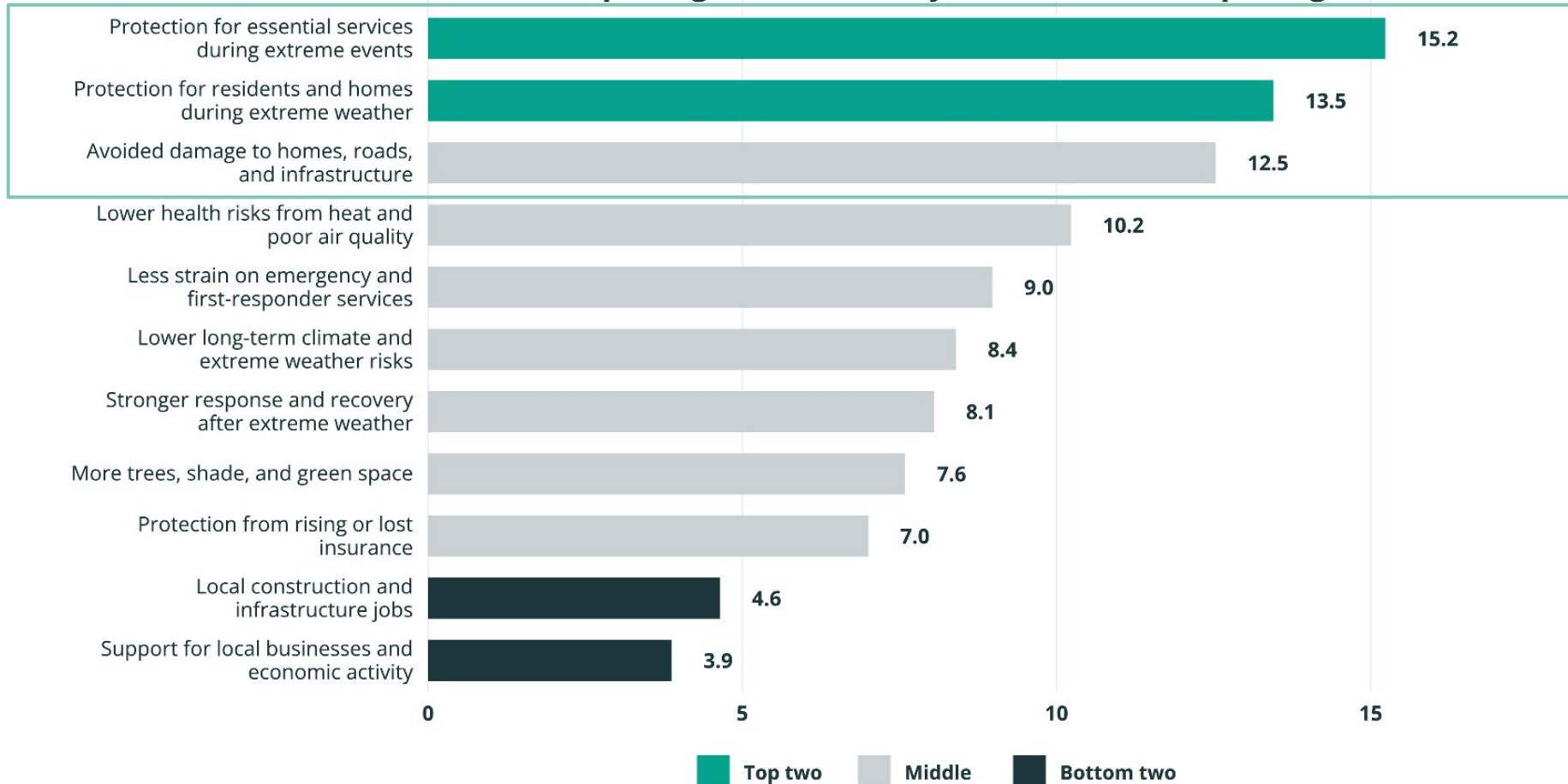
Which co-benefits resonate most?

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

Ontario — On each screen, please select the item you find most compelling and the item you find least compelling



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

EXPOSURE TO EXTREME WEATHER INCREASES DEMAND FOR EVIDENCE THAT CLIMATE INVESTMENTS WORK—AND THAT THEY’LL BE RELIABLE

Comparing residents with direct exposure to extreme weather vs. those with no exposure



MOST IMPORTANT INFORMATION RESIDENTS WANT BEFORE SUPPORTING ADAPTATION

How much risk would be reduced



Wildfire /
Extreme Heat
Exposure

50%



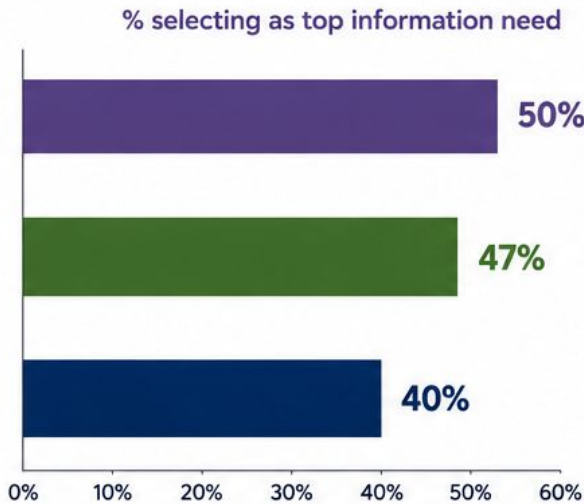
Flood
Exposure

47%



No Heat /
Flood
Exposure

40%



Residents with direct experience of extreme weather prioritize evidence that investments will actually reduce risks.



MOST IMPORTANT INFORMATION RESIDENTS WANT BEFORE SUPPORTING ELECTRIFICATION

Reliability across weather conditions



Wildfire /
Extreme Heat
Exposure

31%



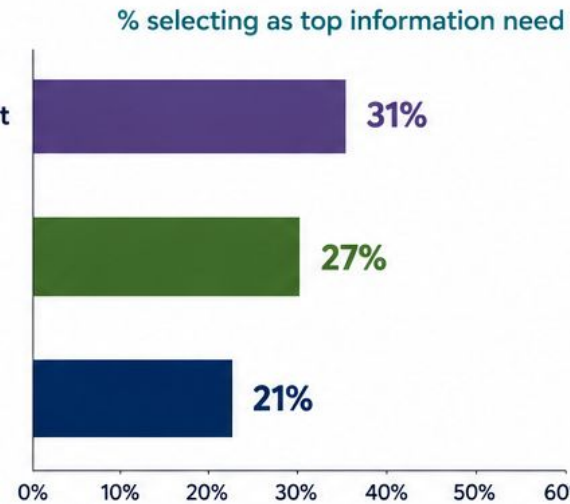
Flood
Exposure

27%



No Heat /
Flood
Exposure

21%



Residents with direct experience place greater importance on **reliability** during extreme weather and outages.



KEY TAKEAWAY

Affordability remains a top concern for all residents. However, those with direct exposure to extreme weather place greater emphasis on two critical questions:

Will it reduce risk? Will it remain reliable when it matters most?



Note: Percentages may not sum to 100 due to rounding.

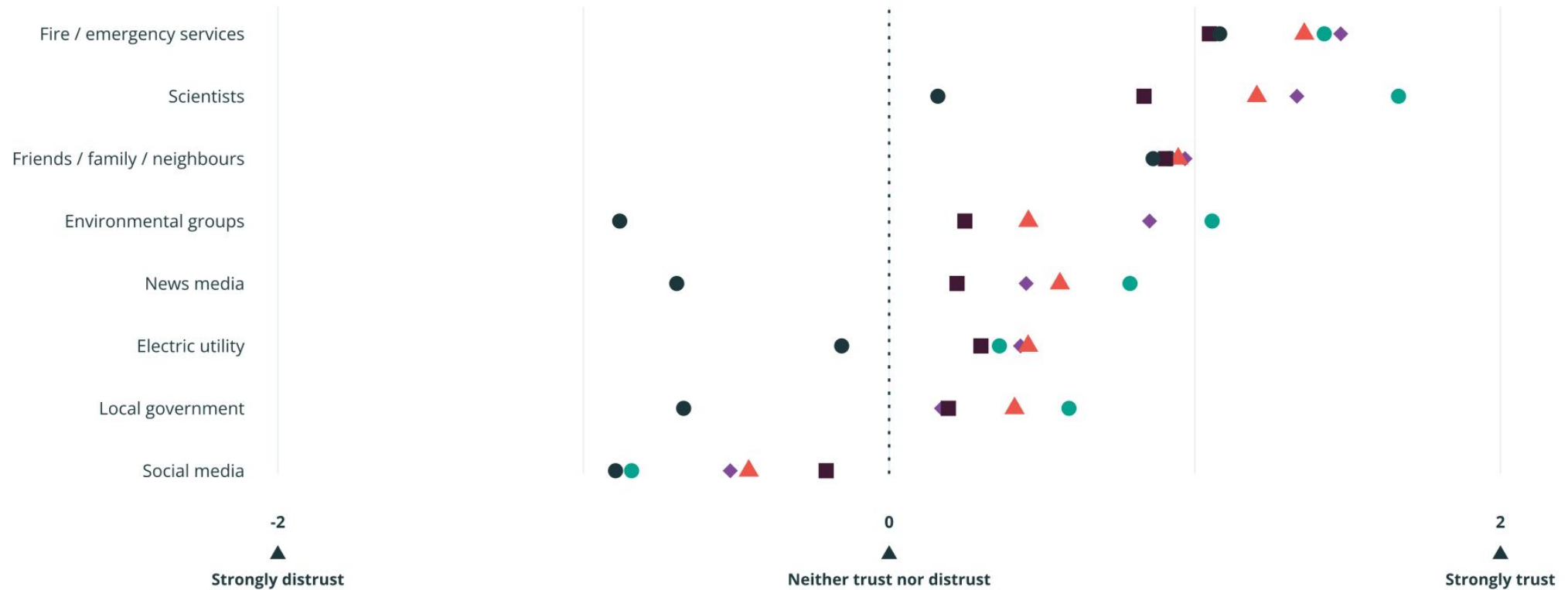
Adaptation takeaways

- Adaptation politics are primarily about protection, effectiveness, and implementation competence.
- Costs and financing remain central implementation concerns, especially among homeowners.
- Lived extreme-weather experience is associated with greater demand for evidence that adaptation investments will work.
- Climate language is not universally toxic, but extreme weather preparedness may broaden appeal.

Trusted messengers

Trust by segment

Ontario - How strongly do you trust or distrust the following sources of information?



● Progressive activists ◆ Civic nationals ▲ Centrist liberals ■ Disengaged middle ● Populist conservatives

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

- 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?



Extras

Segment profiles



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:

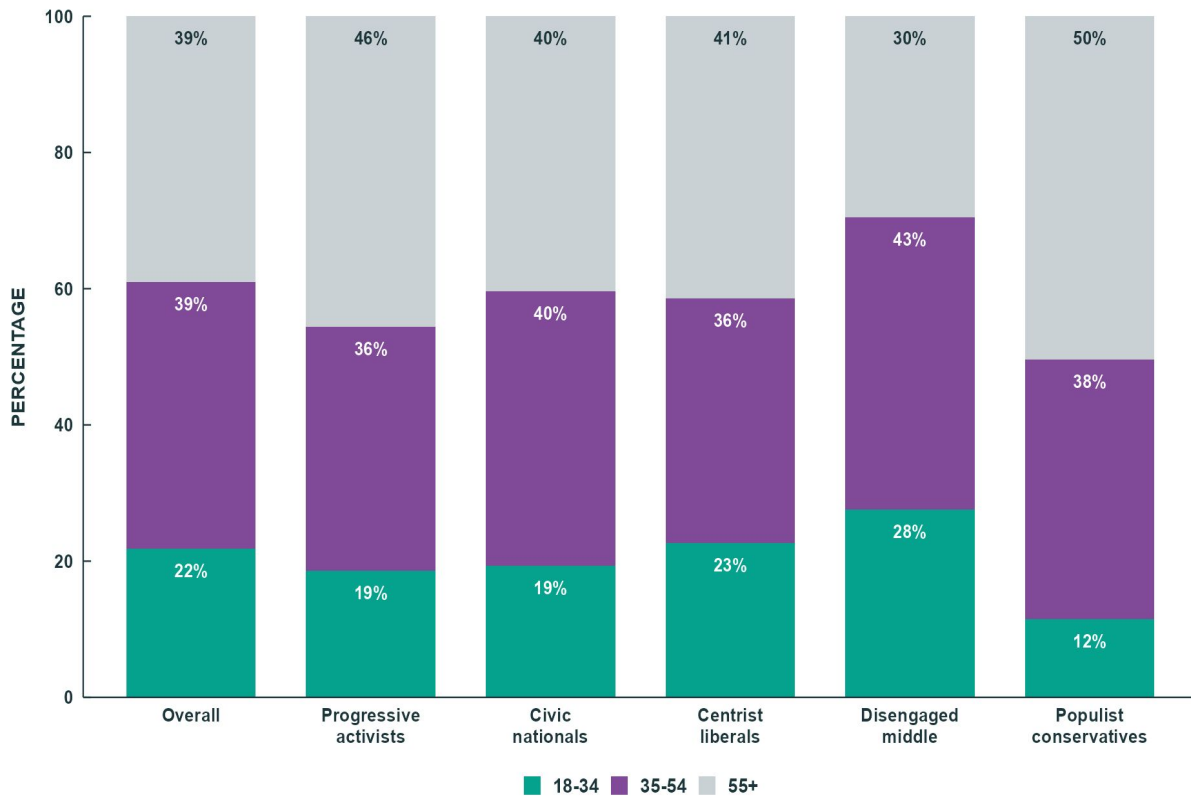
- More male-skewing, older, less diverse, with somewhat lower income
- Housing profile similar to average
- More fossil-fuel dependent for heating; AC access remains high, as it does across Ontario

Readiness & exposure:

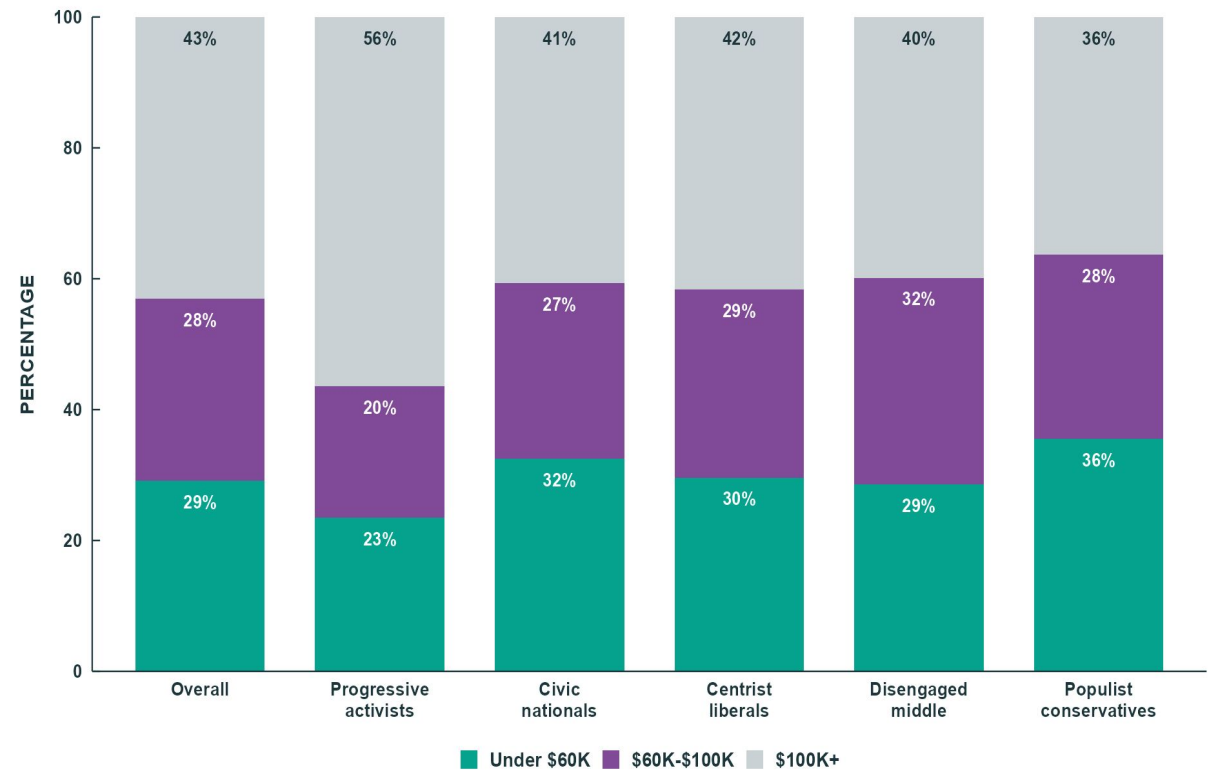
- Readiness weaker overall, especially confidence that personal actions make a difference
- Knowledge of energy-saving actions closer to average, but fewer know where to find support for extreme-weather preparation
- Reported extreme weather experiences generally lower, especially for heat

Age and income

Ontario — Which age group do you belong to?

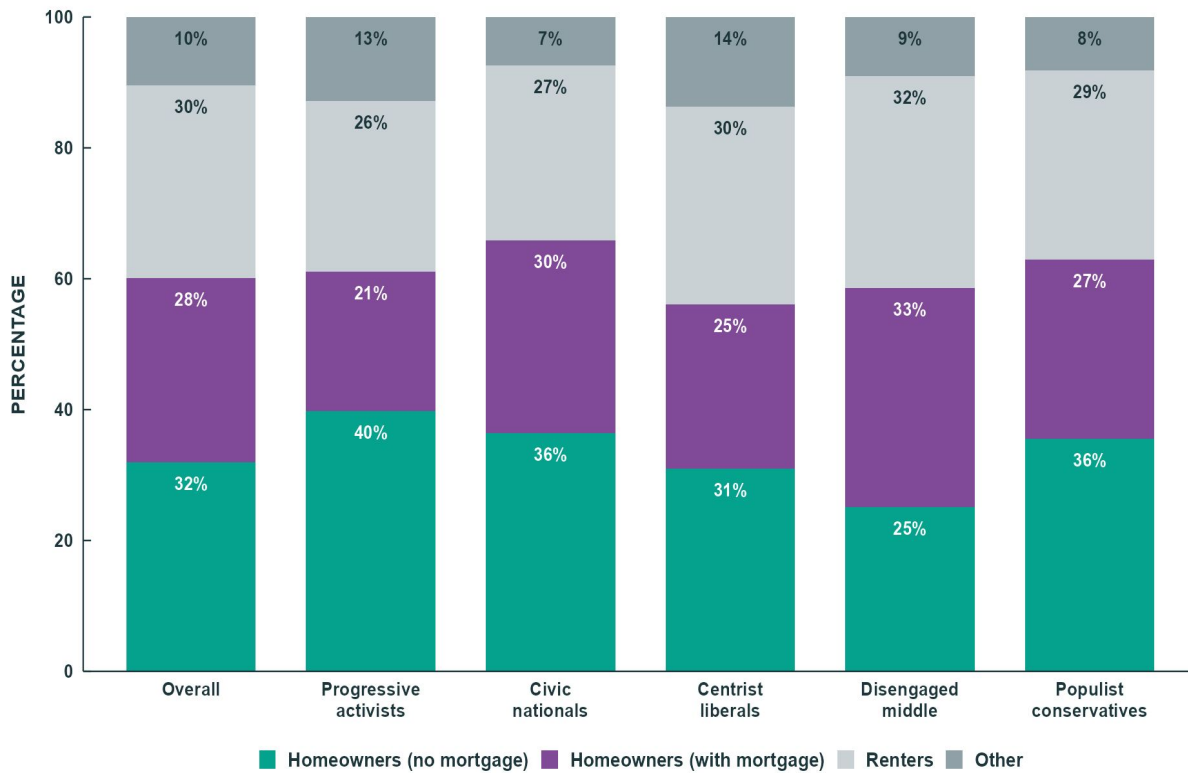


Ontario — Which of the following best describes your total household income?

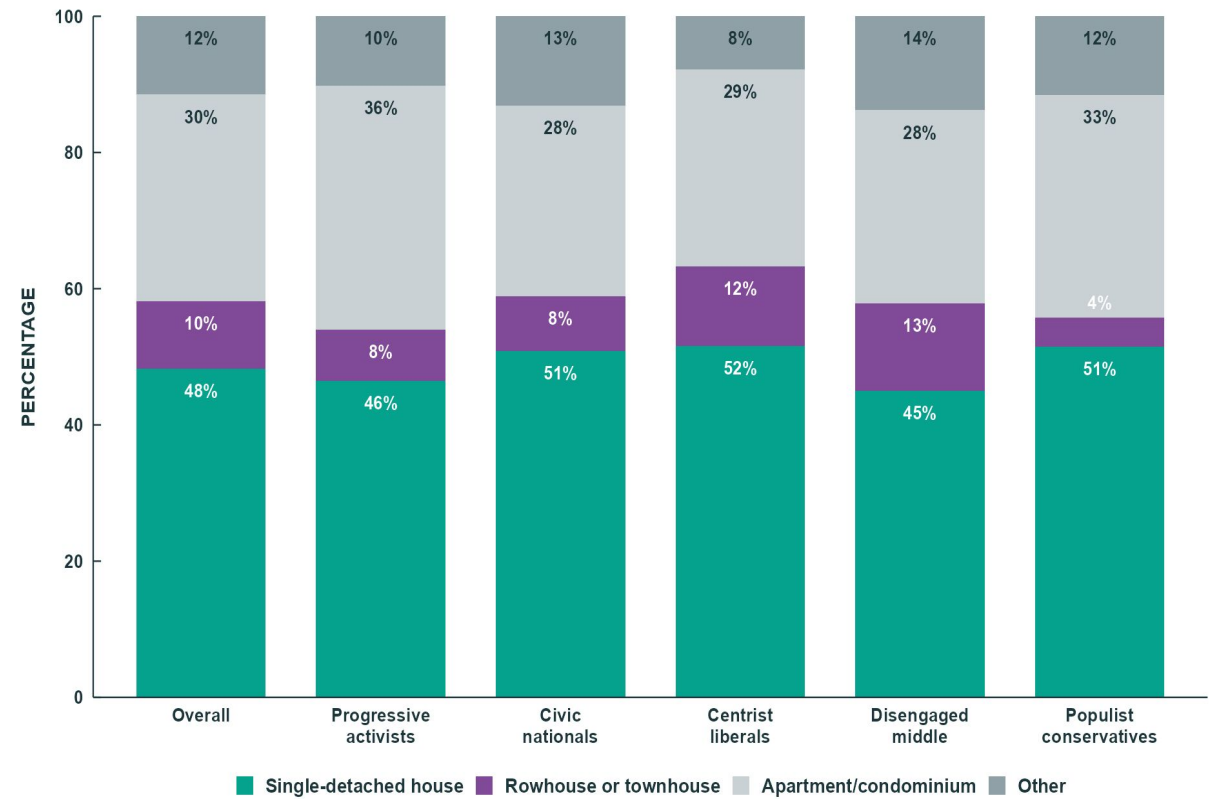


Tenure

Ontario — How is your current housing situation best described?

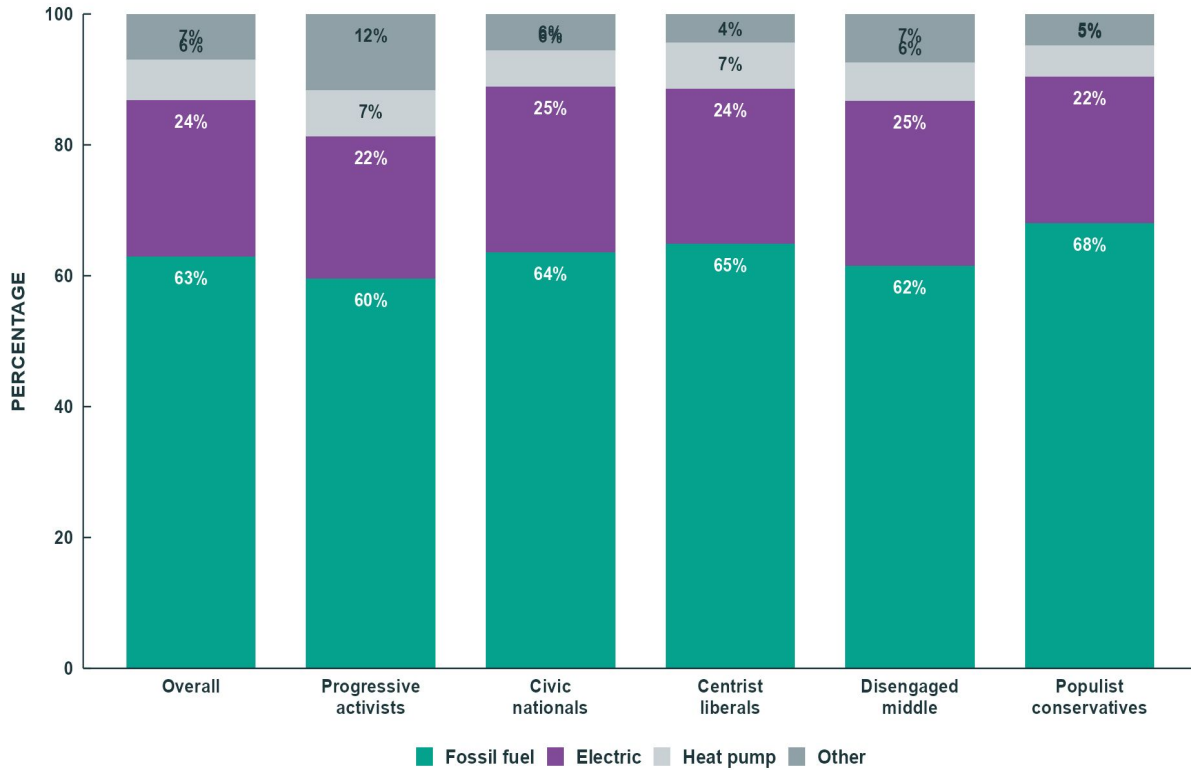


Ontario — What type of building do you live in?

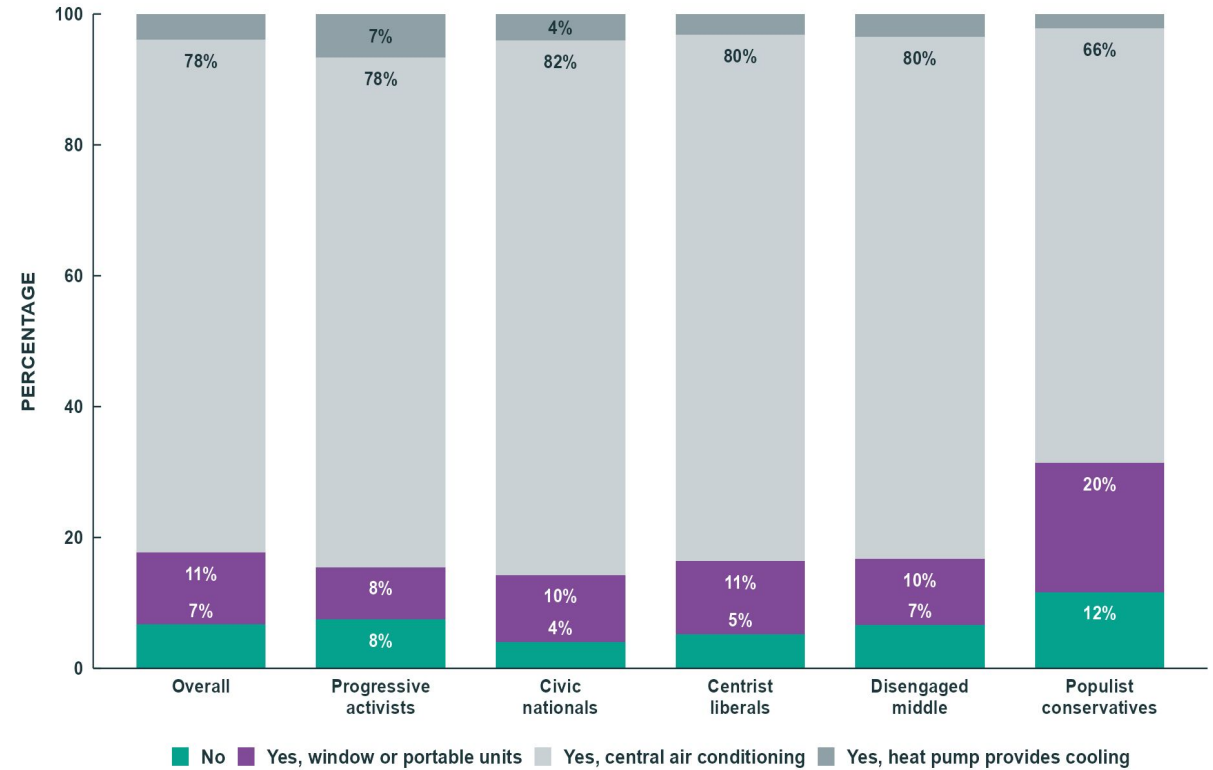


Heating and cooling

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

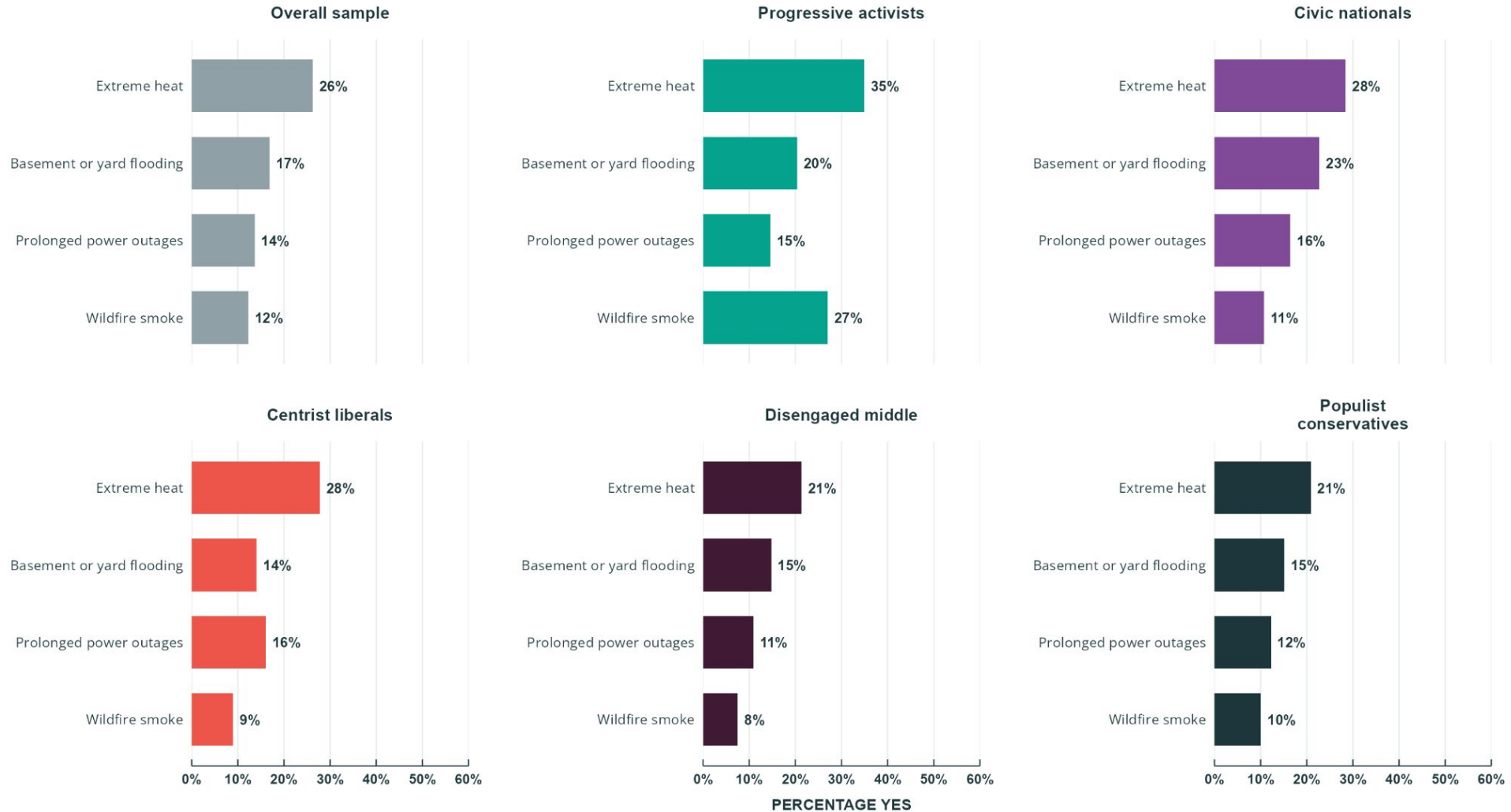


Ontario — Does your home have air conditioning or mechanical cooling?



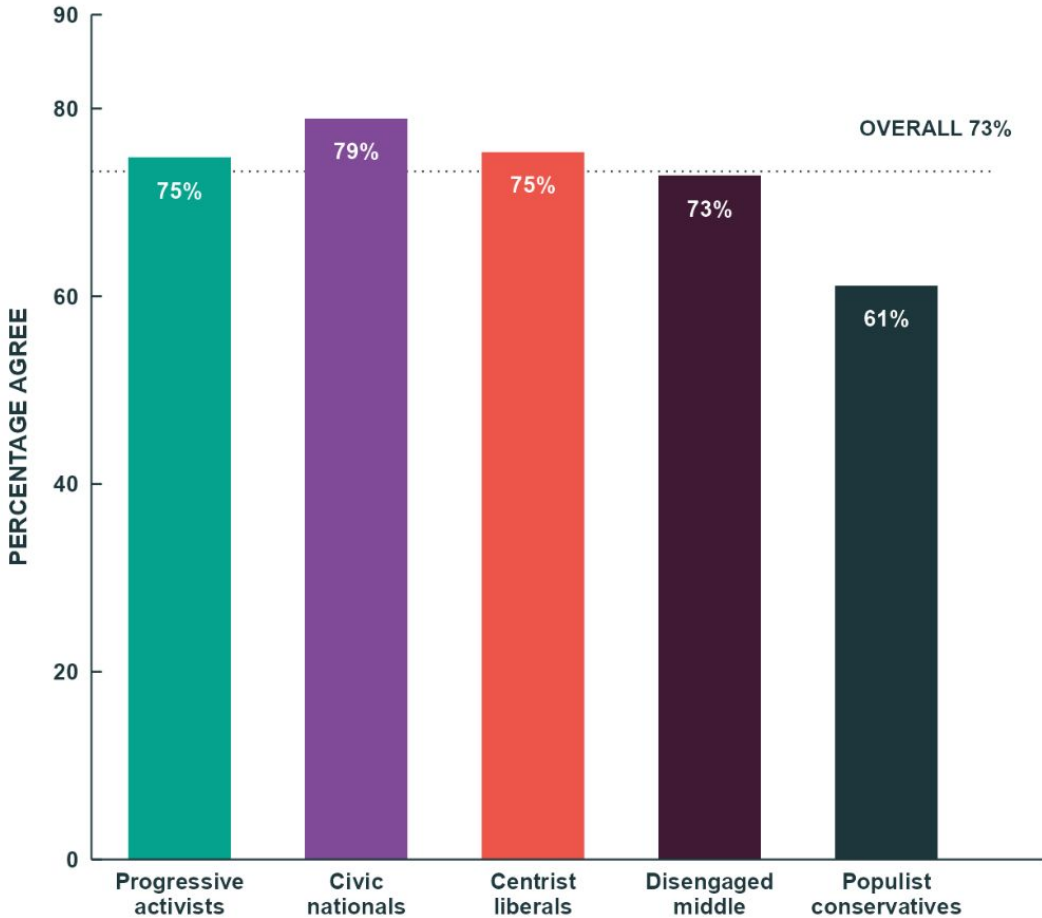
Extreme weather experiences

Ontario — In the past 10 years, have you personally experienced any of the following while living in your home?

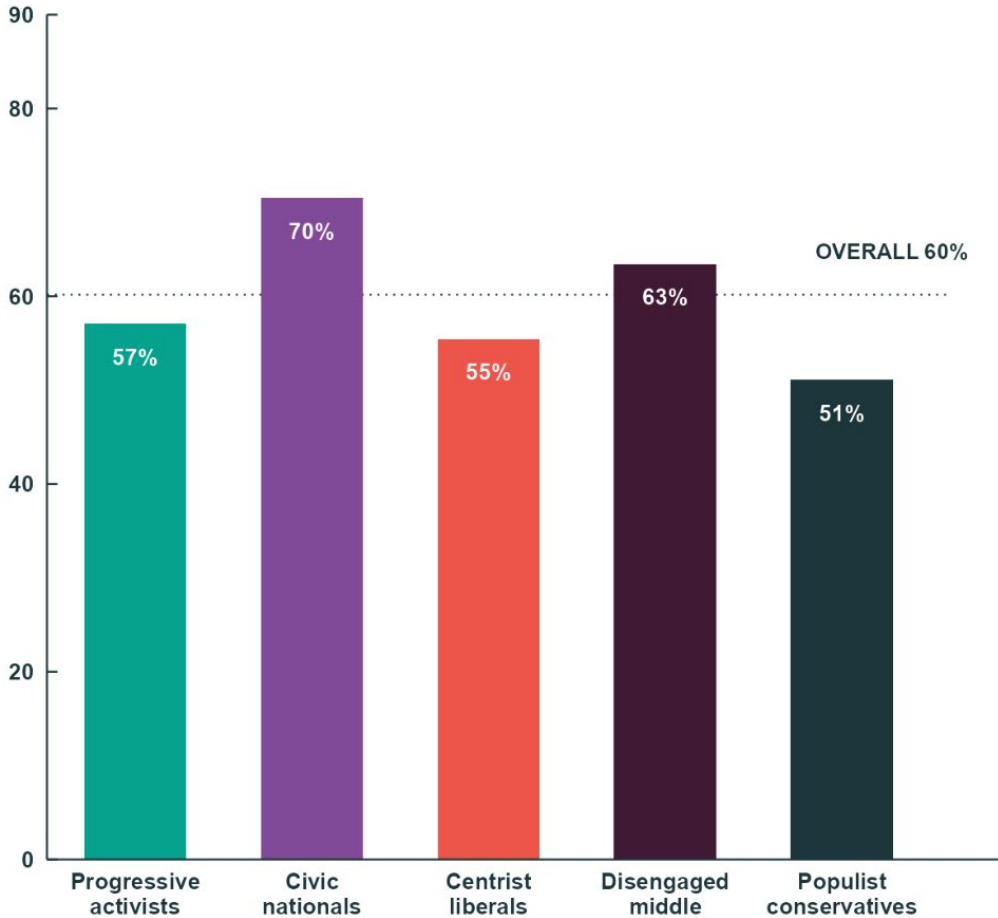


Efficacy

Ontario — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my energy use"

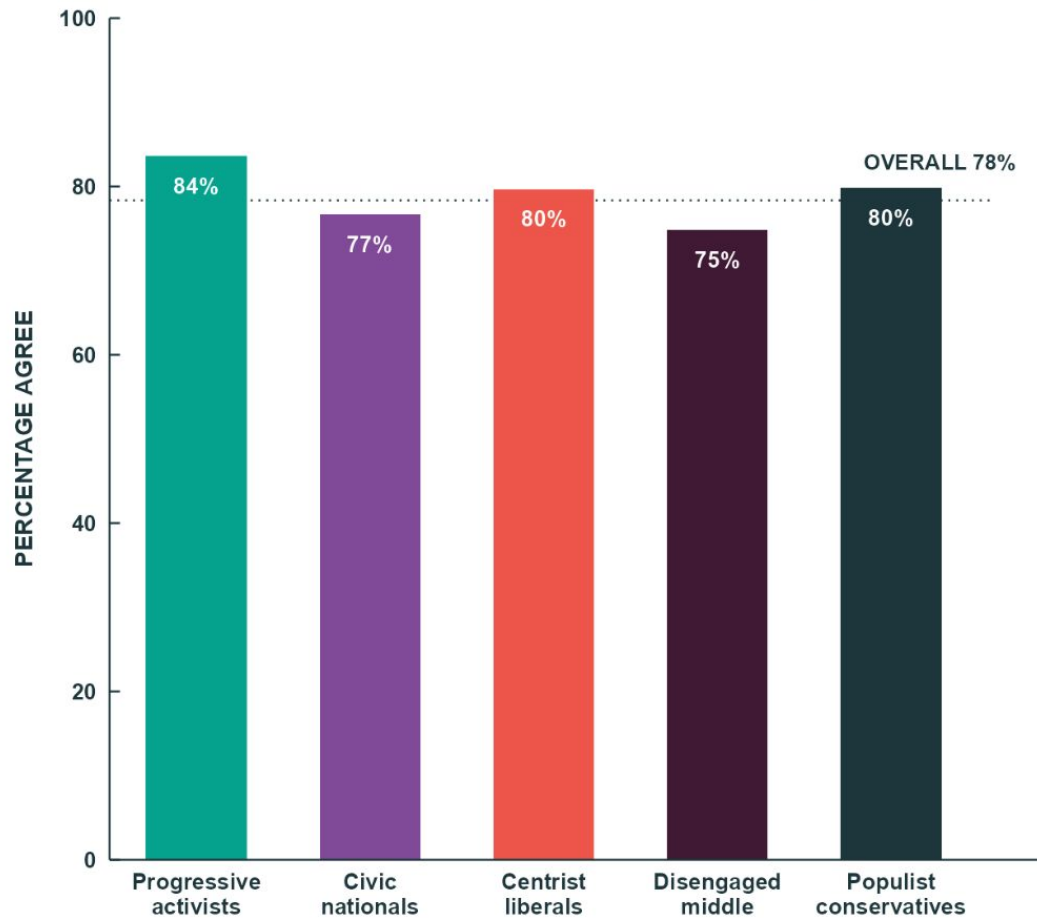


Ontario — Agree/Disagree: "I feel confident the actions I take meaningfully reduce my vulnerability to extreme weather impacts"

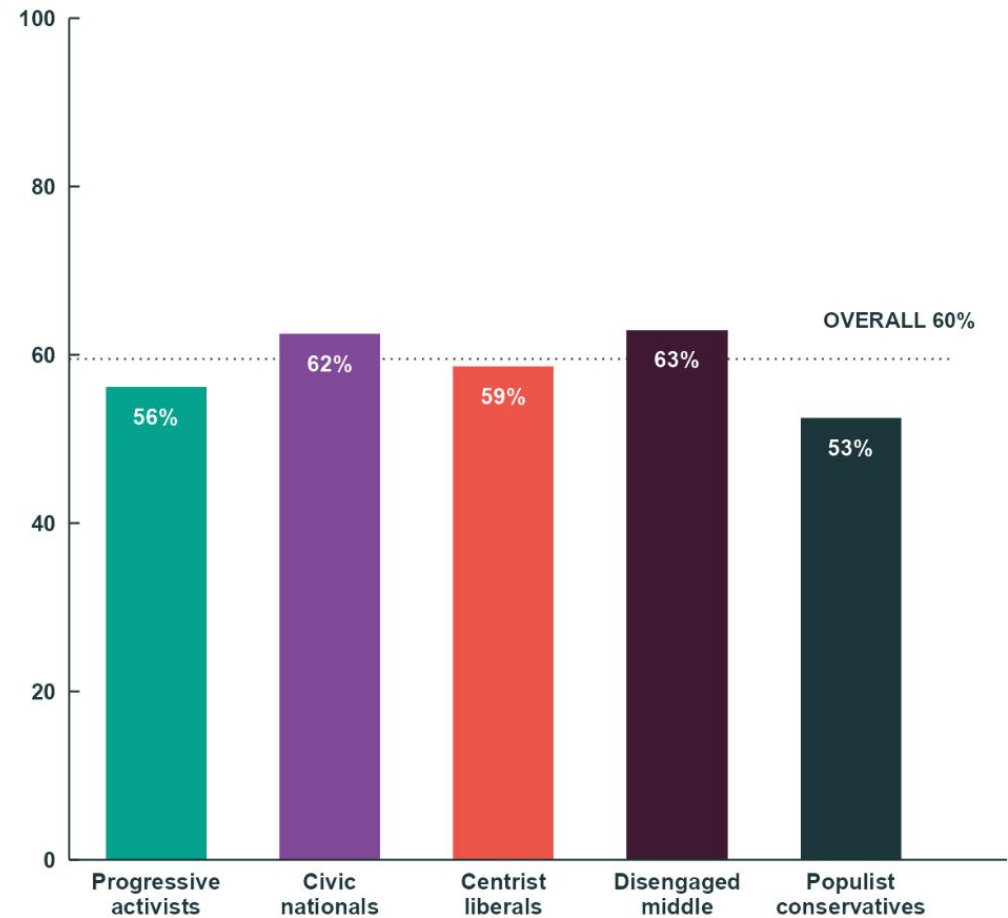


Literacy

Ontario — Agree/Disagree: "I know what steps I could take to reduce my household's energy use"

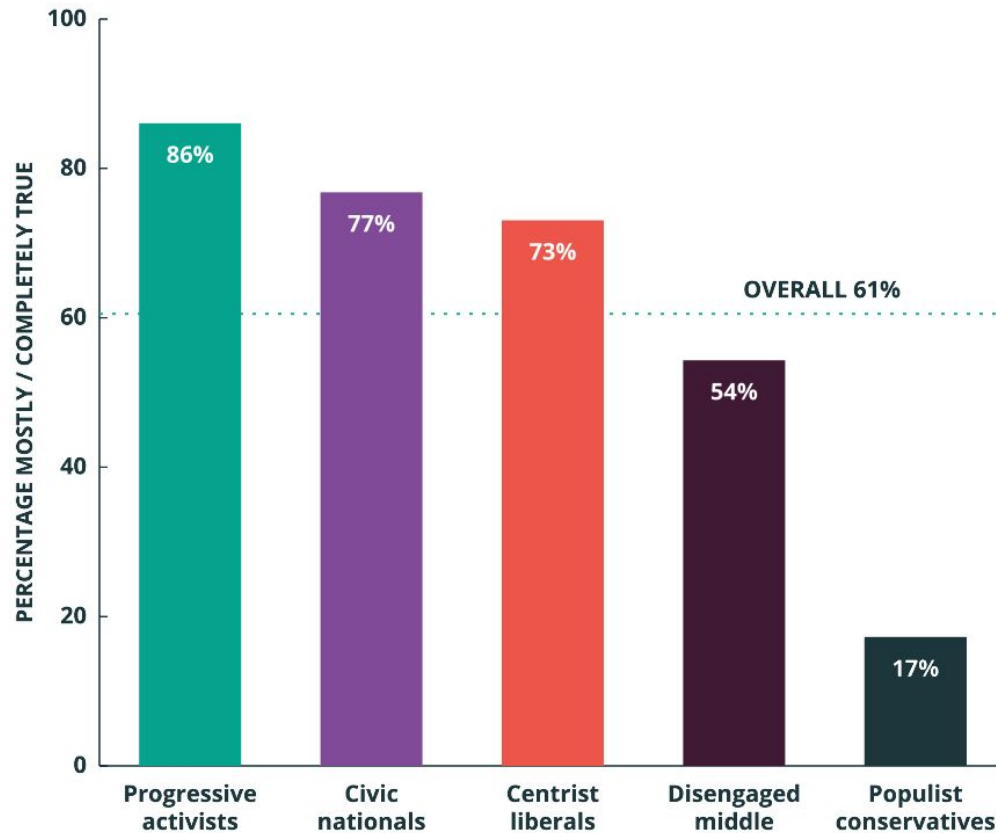


Ontario — Agree/Disagree: "I know where to go for information or support to prepare my home for extreme weather"

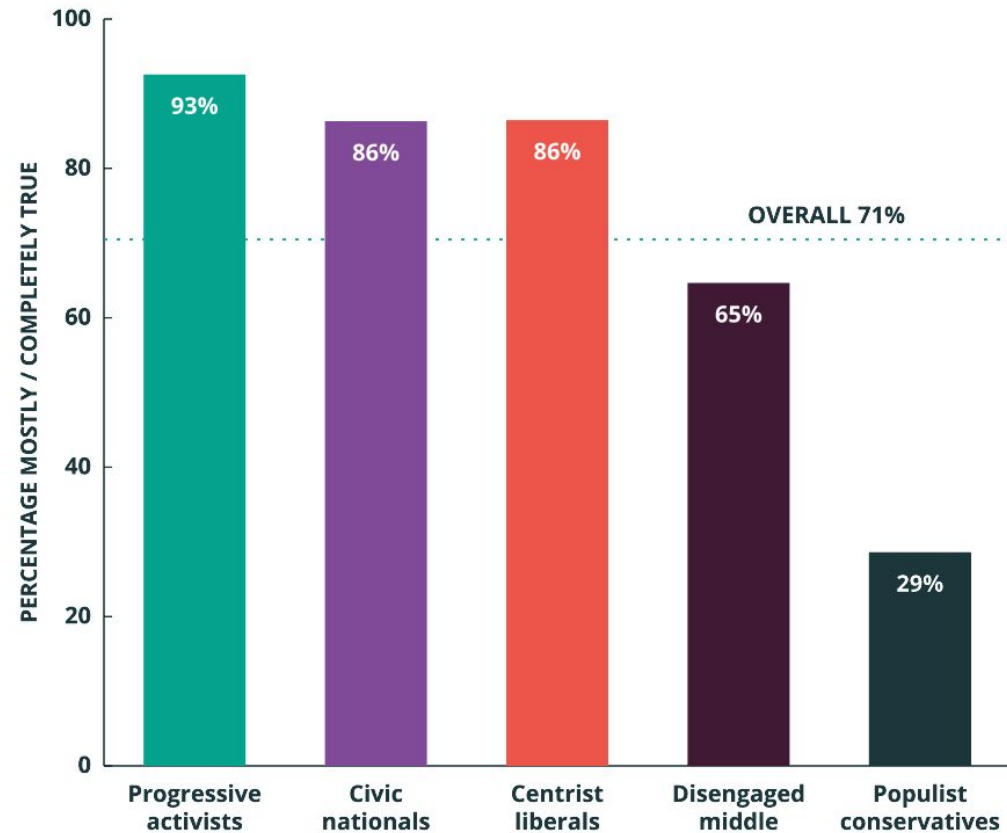


Belief in cost argument

Ontario — Completely true/false: "Climate change impacts are directly contributing to higher costs for households in Canada"



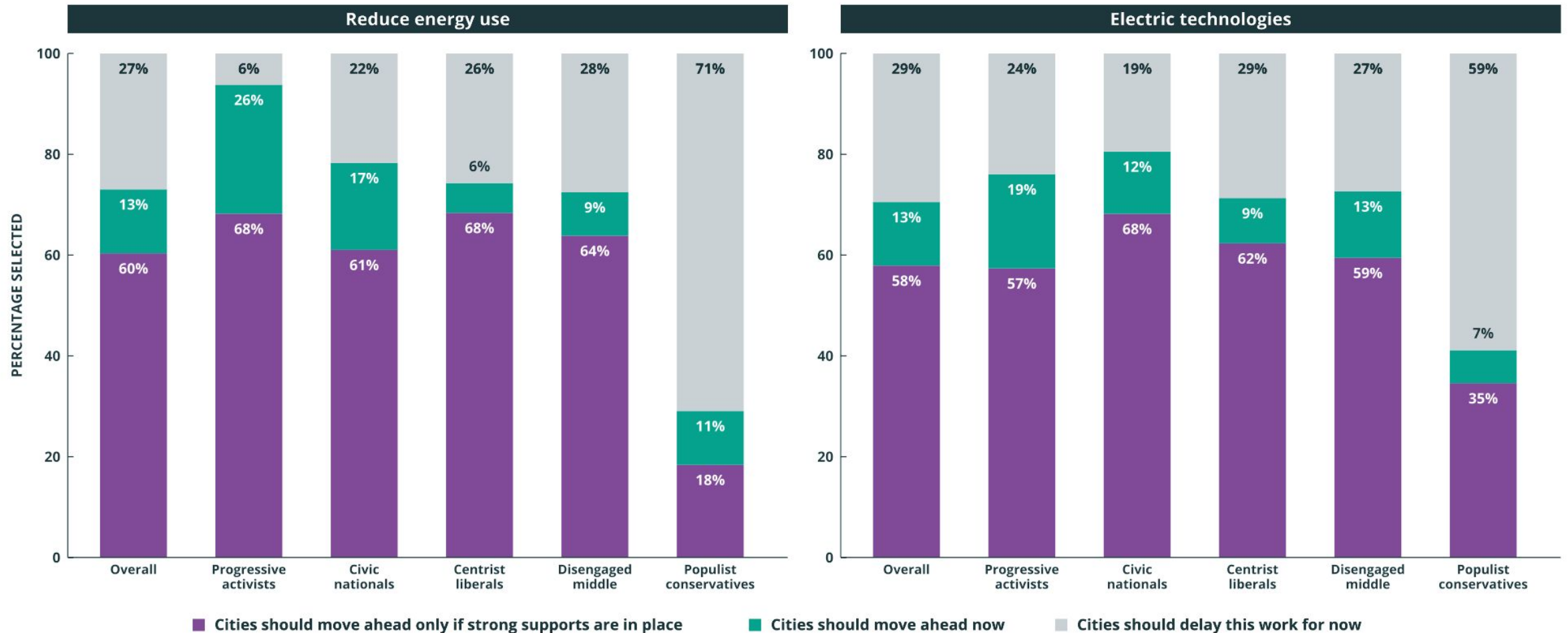
Ontario — Completely true/false: "In many cases, it's cheaper to invest now than to pay for the impacts of climate change later"



Policy perceptions by segment

Moving ahead but with conditions

Ontario — Considering rising costs and other urgent pressures, which comes closest to your view?



Incentives now, requirements later

Ontario — Which approach do you prefer?



Housing concerns by segment

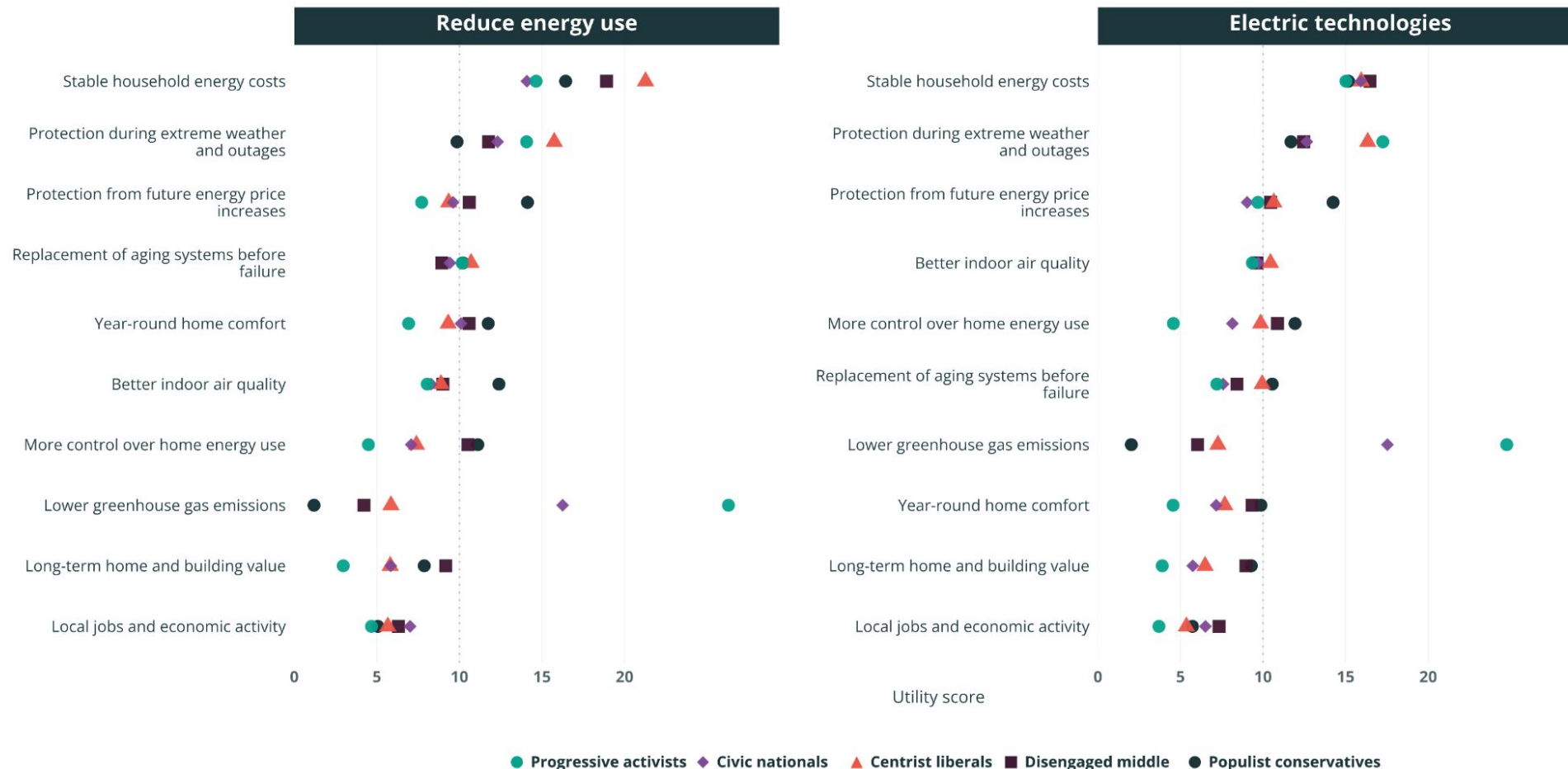
Ontario — Please select the three concerns that are most compelling to you



Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 649 (A); N = 684 (B)

Housing benefits by segment

Ontario — On each screen, please select the item you find most compelling and the item you find least compelling



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

Ontario — Please select the three pieces of information that would be most important to you



Percentage of respondents who selected each item as one of their top three most important information needs; N = 581 (A); N = 629 (B)

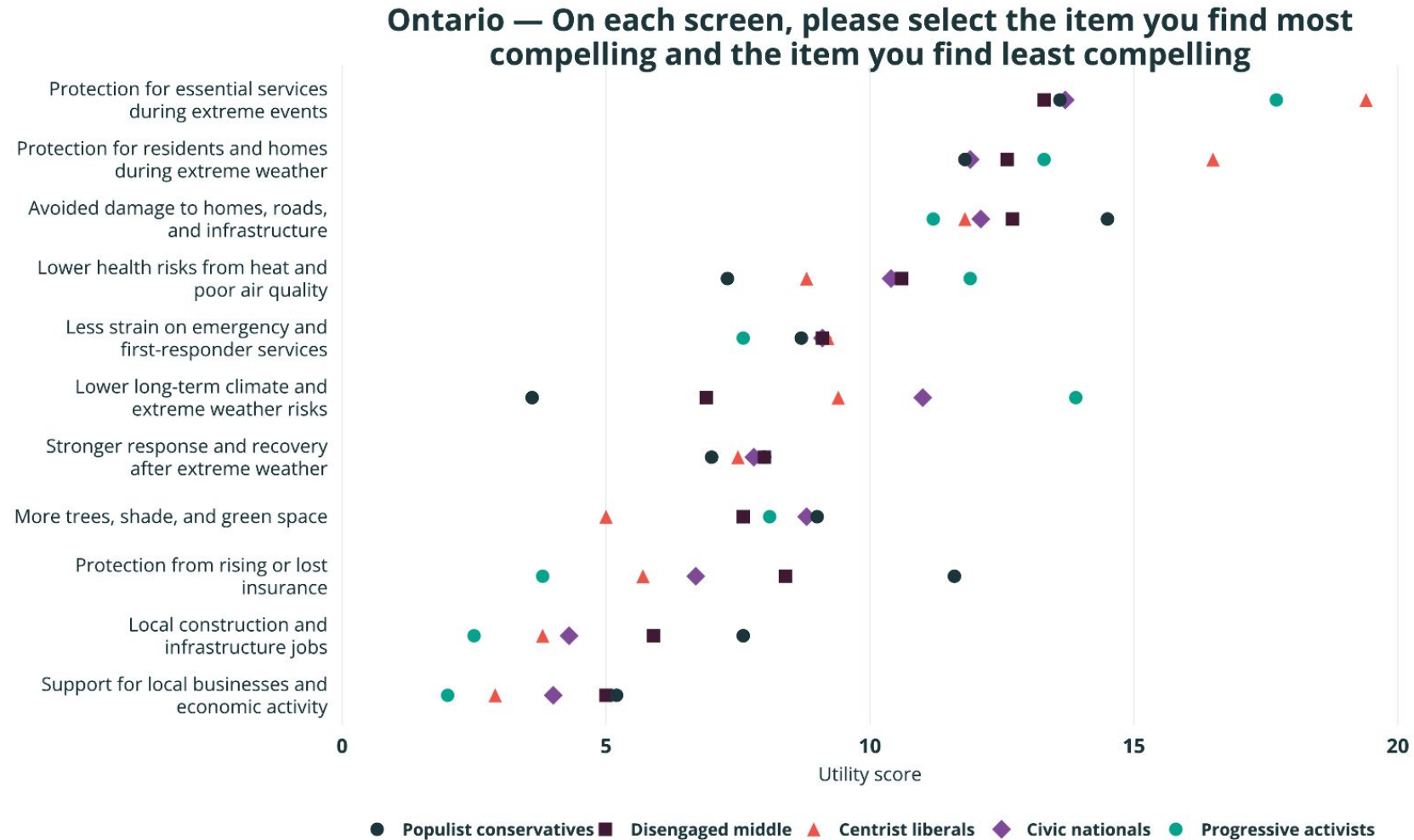
Adaptation concerns by segment

Ontario — Please select the three concerns that are most compelling to you



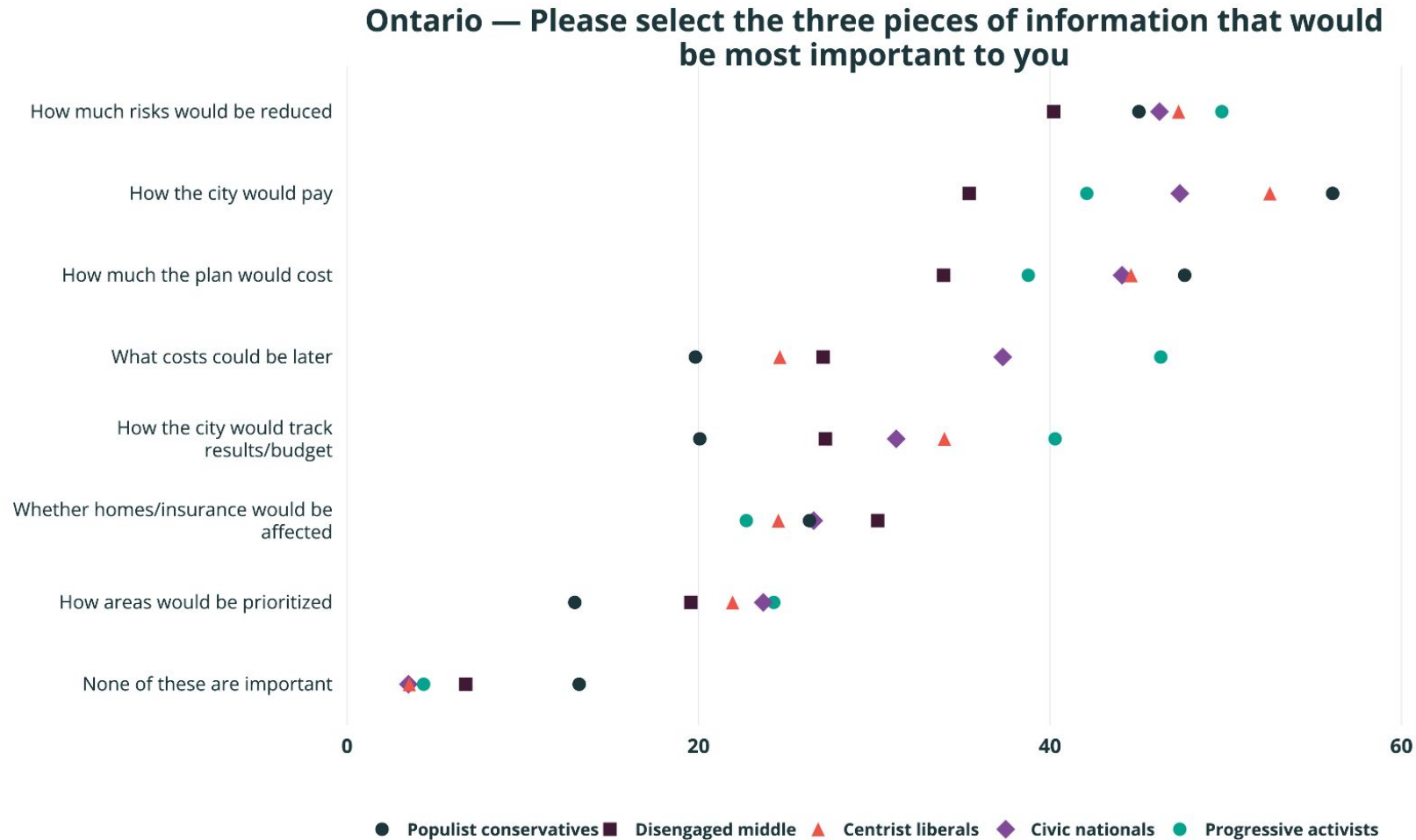
Percentage of respondents who selected each concern as one of their top three most compelling concerns; N = 1210

Adaptation benefits by segments



Utility scores sum to 100. Average = 9.09. N by segment: PC = 144 | DM = 422 | CL = 260 | CN = 180 | PA = 232

Adaptation info needs by segment



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

Communication map

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

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