EcoAnalytics

EcoA Research Nutshell

Talking electrification with *moveable* British Columbians

Electrification is an increasingly polarizing topic in BC. The province is leading the nation in its push for decarbonization of new buildings with a provincially mandated Zero Carbon Step Code (ZCSC) and energy-efficiency building codes, which begin by encouraging improvements then require municipalities to adopt higher levels. While many municipalities, industry stakeholders and homeowners are adopting electrification technologies eagerly, others are hesitating. Many of the hesitators' concerns are legitimate, while others are being sown by the oil and gas industry and its allies, causing confusion and skepticism among some building industry professionals and local decision-makers.

EcoAnalytics (EcoA) and others have done public opinion research recently to learn more about British Columbians' understanding of building decarbonization. What emerges from the results is a population with many significant knowledge gaps around reliability, capacity, efficacy, affordability and impact. In addition, there are deep concerns around trust, fairness and choice. However, there are also opportunities for building broad-based support for stronger regulations and policies. This *Research Nutshell* highlights the barriers slowing down this transition, along with approaches that can work to remove barriers and resonate with hesitant audiences.

Background

BC introduced the Zero Carbon Step Code in 2023. The top level requires new homes to be fully electric for heat, hot water and cooking. As of 2026, 33 municipalities had adopted the ZCSC, most at the top two levels. The City of Vancouver is not required to follow the ZCSC, due to the terms of its specific charter, but since 2022 has been an early adopter of a similar pathway to building decarbonization. Unfortunately, despite broad-based support, Vancouver's municipal council is attempting to dismantle these regulations.

At the same time, and contributing to a slowing down of support for electrification, there is a vocal lobby and publicity campaign questioning the reliability, cost and capacity of BC Hydro to support a transition to all electric buildings. Other competing priorities undermining the push for decarbonization include:

- Oil and gas infrastructure projects that the federal and provincial governments claim are needed for nation-building, at a time of challenges to Canada's sovereignty
- Reduction in the rebates available for adopting heat pumps
- Low overall trust in all levels of government
- A lack of affordable housing
- A struggling building industry, which lacks the training, supply chains, awareness and financing to more broadly adopt electrification

Sources

EcoAnalytics
Lachapelle, Erick and Marjolaine Martel Morin, Clean Cities Research Quantitative Survey, 2026

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Glave, James, Clean Cities Research BC Building Industry Interviews Report, 2026

Environics, BC Qualitative Electrification, Focus groups, 2025

Re.Climate
Five Canadas of Climate, 2024

BC Climate Emergency Coalition
Abacus Data, Climate and Buildings policy survey, 2025

Clean Energy Canada
Switching all BC homes to heatpumps, 2025

More for less, 2025

Stratcom, BC Heatpumps survey, 2024

Zero Emissions Innovation Centre
Better homes and Workplaces: Understanding the Zero Carbon Step Code 2026

Building Industry Survey, 2024

British Columbia's Building Electrification Roadmap, 2026

A project of MakeWay

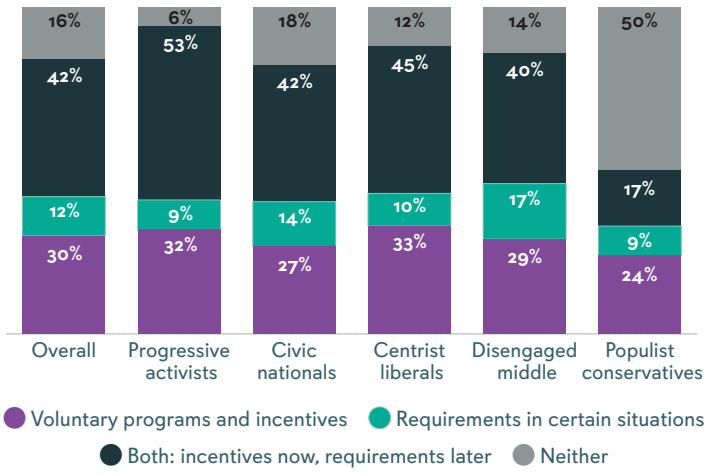
However, the concerns and hesitations here do not represent entrenched opposition to a well-managed transition to clean electricity. The vast majority recognize this needs to eventually happen to stay competitive globally and ensure a good quality of life. The main barriers to more broad-based support are the public's lack of knowledge, a communications landscape dominated by mis- and dis-information, a general lack of trust in government and the efficacy of regulations, and the lack of a vision of the real benefits British Columbians would experience in a province powered by clean energy.

What are British Columbians most concerned about?

My energy, my choice

Through focus groups and quantitative research with BC residents in the *moveable middle**, both urban and rural, we heard that many are not keen on regulations. These folks do not want to be told what type of energy to use in their home, objecting mainly to the lack of choice more than to the electric technology itself. Many agree with all the benefits of switching, but do not want to be forced to install heat pumps. Incentives followed by regulations are supported by most respondents, including the most progressive, as seen in the graphic below.

Which approach to electric technologies do you prefer?



Skepticism and low expectations

Our research has also revealed deep skepticism about all levels of government, specifically, in their ability to implement the proposed change, what is motivating the changes and who will benefit from the changes (many are doubtful that cost saving will flow through to them). For some, after years of being told that natural gas is safe, affordable and environmentally friendly, the switch to electricity alone seems dubious. Electricity is still perceived to be more expensive and not necessarily viable, especially among residents in northern parts of the province. By contrast, gas is seen as reliable, traditional and more affordable. BC Hydro's long running publicity campaign teaching us how to save money on our energy bills by reducing consumption, along with antiquated and expensive heating technology like baseboard heaters contributes to the real and perceived costs of electricity. While the majority of British Columbians are interested in electric heat pumps, the technology is still often not perceived as affordable due to upfront costs (BC emergency coalition energy landscape poll).

Industry is hesitant

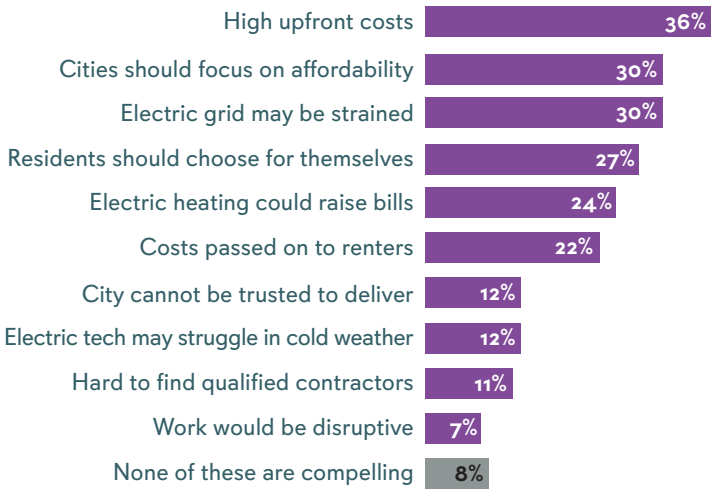
There also appears to be a lack of broad-based support for the ZCSC from the building industry as revealed in EcoA's interviews with building contractors and developers. These 20 interviews with *middle-ground* contractors and developers highlighted supply-chain issues, permitting and financing obstacles and a general lack of training and awareness contributing to real and perceived costs and increases in the time needed to build all-electric buildings. However, despite this hesitation, there are also many within the industry that are ready to adopt and promote decarbonization, as highlighted in this 2024 industry survey. So, like many British Columbians in the middle ground, industry professionals are somewhat divided, with some logistical and educational hurdles to overcome, but most do understand the need for this transition and the important role of the building industry in this transition.

But is there really enough?

Trust in BC Hydro's ability to generate and provide enough electricity to supply energy to homeowners across the province is also low. Some of this skepticism comes from opposition framing, some from BC Hydro's lack of effective communications about its ability to meet growing residential demand alongside commitments to power proposed LNG export facilities, not to mention proposed AI data centres. It should be noted that trust in Fortis BC is also low, and the majority believe there should be better oversight and regulations for this utility (see, for example, BC emergency coalition energy landscape poll).

This graphic sums up the key concerns on electrification.

Top concerns about electrification



Percentage of respondents who selected each concern as one of their top three most compelling concerns

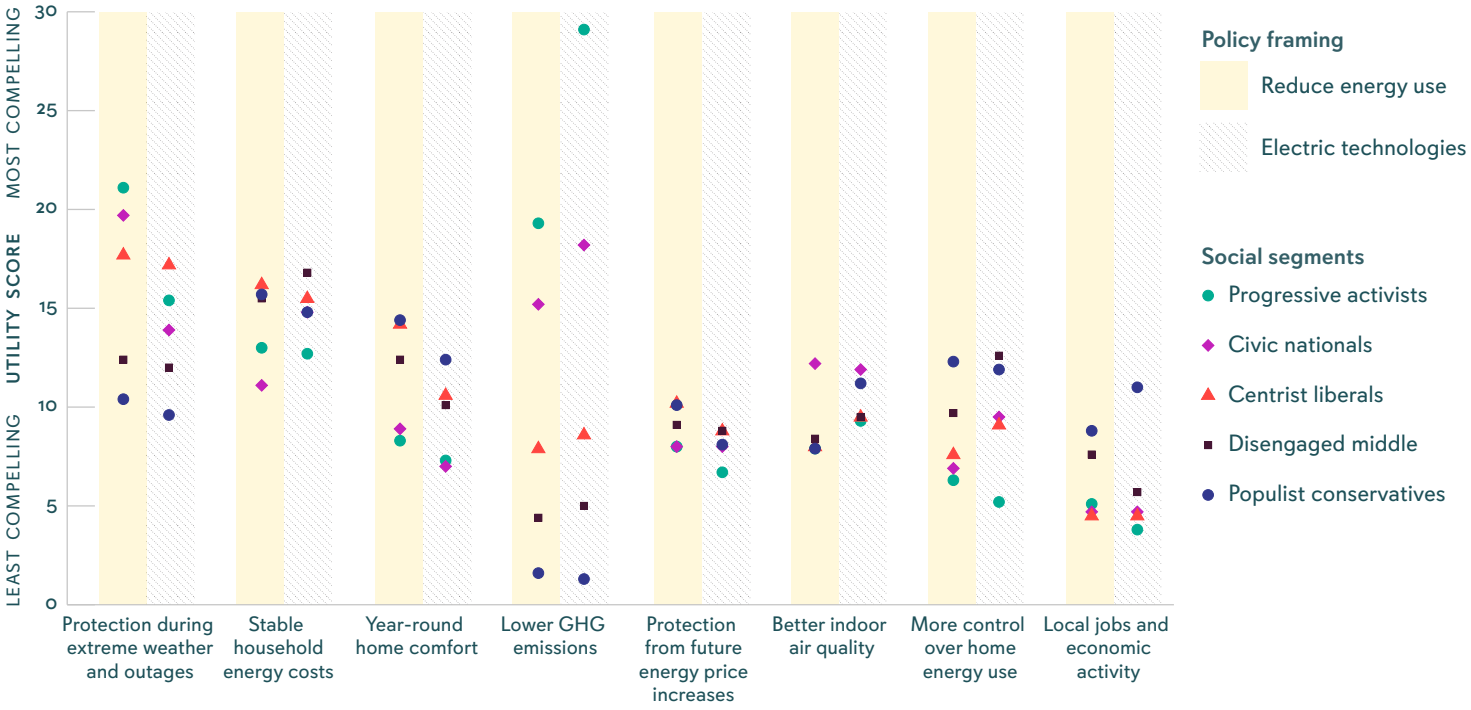
What frames and messages resonate?

Focus groups showed that narrative frames emphasizing fairness, especially with reference to the heat dome that killed hundreds of vulnerable British Columbians in 2021, are powerful, resonating with people across the social values segments (see note below). Most of us agree that everyone needs a safe place to live and this frame allows for messages about the advantage of heat pumps in cooling as well as heating homes. While indoor air quality and the possible negative health impacts of gas cooking and heating concerned some (parents, and elderly focus group participants, in particular), these were not as big a motivator for switching energy sources.

The quantitative survey backed up the importance of protection frames, showing that protection from extreme weather events was one of the most compelling frames for electrification. Stability of costs was also compelling. Personal direct benefits (cost, reliability) appear to resonate far more than broader social benefits (job creation, and climate solutions).

Finally, British Columbians also appear to be more willing to embrace electrification policies when the issue is presented as a matter of improving energy efficiency, rather than electrifying buildings. This preference is particular to BC residents, as a similar Ontario survey did not reveal this preference. However, many of the benefits of electrification and energy efficiency are perceived to be one and the same. The chart below shows the most compelling reasons to adopt electrification or reduce energy, by social value segment (see note below).

Most compelling reasons to adopt electrification/reduce energy



Guidance

Keep filling the knowledge gap on heat pumps

- Most British Columbians are interested in heat pumps and want to know more
  - > Heat pumps provide heating and cooling so there's no need for a separate AC system. One system keeps your home comfortable year-round
  - > Electric heat pumps are also reliable and use three times less energy than gas furnaces, whose utility bills can see big price swings
    - Show the savings on monthly bills: $100–250 per year with a cold climate heat pump, compared to a gas furnace plus air conditioning
  - > Heat pumps are effective and reliable even in northern BC
    - Use examples and real people to confirm this
  - > Gas furnaces and appliances have health and safety risks; degrading air quality, harming our lungs and causing fire and explosions (but be careful about how you talk about these risks, as noted below)
  - > Emphasize reliability and grid capacity (cost of heat pumps is not the only concern)
    - Back this up with BC Hydro data indicating ample capacity

Talk about energy efficiency instead of electrification

- Energy efficiency resonated more with British Columbians, as framing around electrification is more polarizing
- Heat pumps are a key part of energy efficiency, so point to polling data confirming that Canadians care about energy efficiency, with 91% recognizing Canada should be building energy-efficient and resilient homes
- Focus groups found "energy efficiency" to be too abstract, try "heat pumps use three times less energy than gas"

Stress protection and energy-cost stability

- When talking about energy efficiency or electrification, protection and cost stability resonate far more than arguments about job-creation and climate change
  - > However, climate/emissions reduction framing was more popular among *Progressive activists* and *Civic nationals* (see note), so it is worth using with these segments
- Frames emphasizing comfort and quality of life are also worth trying
- Use fairness frames like "right to cool"
  - > Collaborate with housing advocacy and renters' organizations in educating people about the life-saving benefits for renters and vulnerable populations, in particular

Use trusted messengers

- People with lived experience, knowledgeable builders and contractors, people with heat pumps, health-care professionals
- BC Hydro is relatively trusted by all segments and should be louder in reassuring BC that there is grid capacity and directly countering misinformation spread to the contrary

Highlight progress and impact

- Talk about the scale of emission-reductions in municipalities using the ZCSC
- Highlight the number of new homes already built without gas hook-ups, and how many people have already switched to heat pumps
- Amplify projects where rentals are going in with heat pumps and/or being renovated
- Show examples where this progress is already happening, especially in colder regions of the province

Talk about corporate accountability

- Focus group participants generally recognized that there is a time and a place for regulations, e.g. that:
  - > Regulating the actions of big companies protects us, so it's the government's duty to regulate

- While progress and economic growth are good, there needs to be guardrails and balance to protect our communities
- Key message: Governments have a responsibility to ensure that homes and workplaces are healthy and safe. Modern building codes that promote heat pumps will help keep people safe from extreme heat, while reducing emissions

Keep in mind people's different social values

British Columbians in the *moveable middle* tend to be driven by pragmatism, not ideology. Concerns about implementation need to be taken seriously and addressed with reassurance and practical details. Even strong supporters of climate action, such as most *Progressive activists*, want details about implementation and efficacy (see note below for more information on social values segments).

Be careful when discussing the harmful impacts of natural gas

- Most people do not recognize the harmful effects of methane combustion to themselves, their families or the earth's atmosphere — most still consider gas furnaces and stoves as clean tech
  - Years of government and corporate promotion of natural gas as natural and clean have left British Columbians ignorant about the harms that accompany the fracking, transport and combustion of this energy source
  - Skepticism is widespread regarding the harms of burning gas
- Many have gas stoves and have never suffered ill effects

Don't lead with the virtues of regulation

- British Columbians want choice, and may be more adverse to government regulations than ever
  - Even *Progressive activists* favour incentives over regs
- Regulating large corporations that produce, transport and sell gas, however, may be more acceptable to *middle-of-the-road* audiences
- However, many still accept that regulations may be necessary later on, but only with the appropriate supports in place
- Key messages in making the case for regulations:
  - Governments have a responsibility to ensure that homes and workplaces are healthy and safe. Modern building codes that promote heat pumps will help keep people safe from extreme heat, while reducing emissions
    - This will protect vulnerable people, such as seniors, who were among the largest group of the over 600 people who died from overheating during the 2021 heat dome
    - Since British Columbia is blessed with abundant, reliable, and clean electricity, heat pumps are a smart choice to heat and cool our homes and workplaces
    - Burning fossil fuels, such as gas heating in buildings, worsens the impacts of climate change, contributing ing to more intense and frequent extreme weather and climate impacts

Note: EcoA's Focus groups recruited BC residents who expressed values that suggested they might be open to conversations about climate change and its solutions. They were drawn from four of the five social-value segments identified in EcoAnalytics CA-MAP segmentation research (Five Canadas of Climate Change, 2023–2024). The Clean Cities Research quantitative survey recruited respondents from all five segments. *Progressive activists* tend to be supportive of climate action, though not necessarily always deeply engaged in climate action. *Civic nationals* are also supportive of most climate action, but may hold less progressive social values. *Centrist liberals* and the *Disengaged middle* are less supportive of climate action and environmental protection, though they have some concerns. We define the *moveable middle* as those in the latter three segments (CN, CL and DM). The fifth segment is *Populist conservatives*, who are generally not supportive of climate action or electrification.