September 2022

Tech and Innovation Series

Edition 1| Renewable Energy and Going Green

How Canadians are adopting
renewable energies and future plans

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Leger

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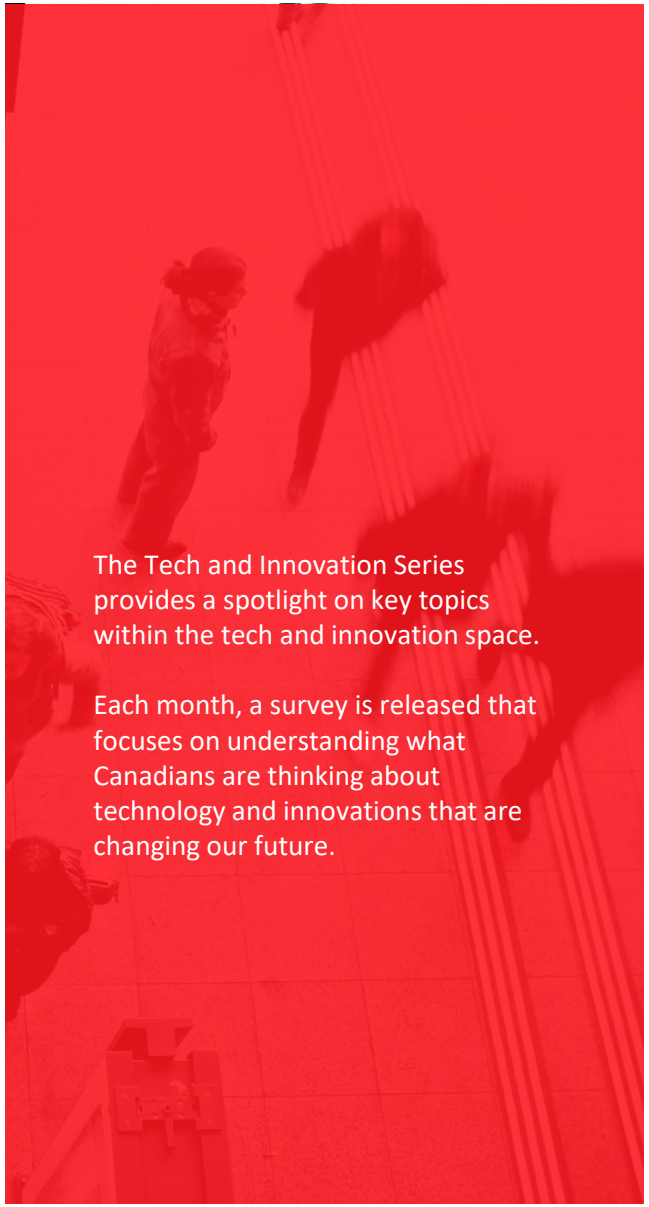


The Tech and Innovation Series provides a spotlight on key topics within the tech and innovation space.

Each month, a survey is released that focuses on understanding what Canadians are thinking about technology and innovations that are changing our future.

Tech and Innovation Series

1. **Going Green**
   September 2022

2. **Talent**
   October 2022

3. **Digital Experiences**
   November 2022

4. **Fintech**
   December 2022

5. **Education**
   January 2023

Methodological approach

Topic

Renewable energies and investing in sustainable technologies.

Study population

French- and English-speaking Canadians, aged 18 or over.

Sample

A total of **1,721 Canadians** were surveyed.

Data collection

The study was conducted online. Respondents were randomly selected from Leger's LEO panel, a panel representative of Canada's population which includes more than 400,000 members across Canada and the United States.

Collection period

Data collection was conducted from July 29th – August 4th, 2022.

Weighting and representativeness

To ensure that the sample is representative of the entire adult population of Canada, raw data was weighted according to the actual distribution of the population based on gender, age, and regions.

The results are weighted using data from Statistics Canada's latest available census.

Margin of error

As a comparison, a probability sample of this size (n=1,721) would have a margin of error of +/- 2.36% with a confidence interval of 95% (19 times out of 20).

Key Learnings

Key Learnings

1

There isn’t really one province that is the “most green”.

Canadians are going green, but each in their own ways, and knowledge levels of different renewable energies vary by province. Government and businesses might want to think about each provinces’ specific needs and preferences when encouraging residents to adopt more sustainable practices.

2

Canadians believe individuals play a role in increasing the production and use of renewable energies.

While Canadians believe that government (75%) and business (73%) have equal responsibility to focus on increasing the use and production of renewables, they also believe individuals play an important role in the use and production of renewables (63% agree it is important).

3

Canadians are split on paying more for “more green” power.

Among those who pay for utilities, half would pay more on their monthly power bill to guarantee part of their power is from renewables. Two-in-five (41%) would pay 5-10% more on their monthly bill, while one-in-ten (9%) would pay 10%+ more on their monthly bill.

4

Albertans may be greener than publicly perceived, but want to go green on their own terms.

Albertan homeowners are one of the most likely to spend $1,000 or more on their home to achieve no month-to-month fuel costs, but are the least likely to pay for green utilities. Albertan homeowners are also more likely to purchase solar panels in the next 5 years than homeowners in other provinces.

Detailed Findings

Knowledge of Renewable Energies

Know “a little” or “a lot”

	Total	BC	AB	MB/SK	ON	QC	ATL
n=	1721	156	327	125	603	410	100
Solar energy	73%	71%	80%	80%	72%	71%	75%
Hydro energy	73%	73%	68%	75%	74%	74%	64%
Wind power	69%	64%	74%	75%	68%	69%	72%
Geothermal energy	43%	51%	46%	55%	39%	41%	37%
Bioenergy	32%	34%	26%	30%	30%	40%	22%
Ocean energy	30%	39%	32%	25%	28%	28%	36%

Canadians have different knowledge levels on renewable energies depending where they live.

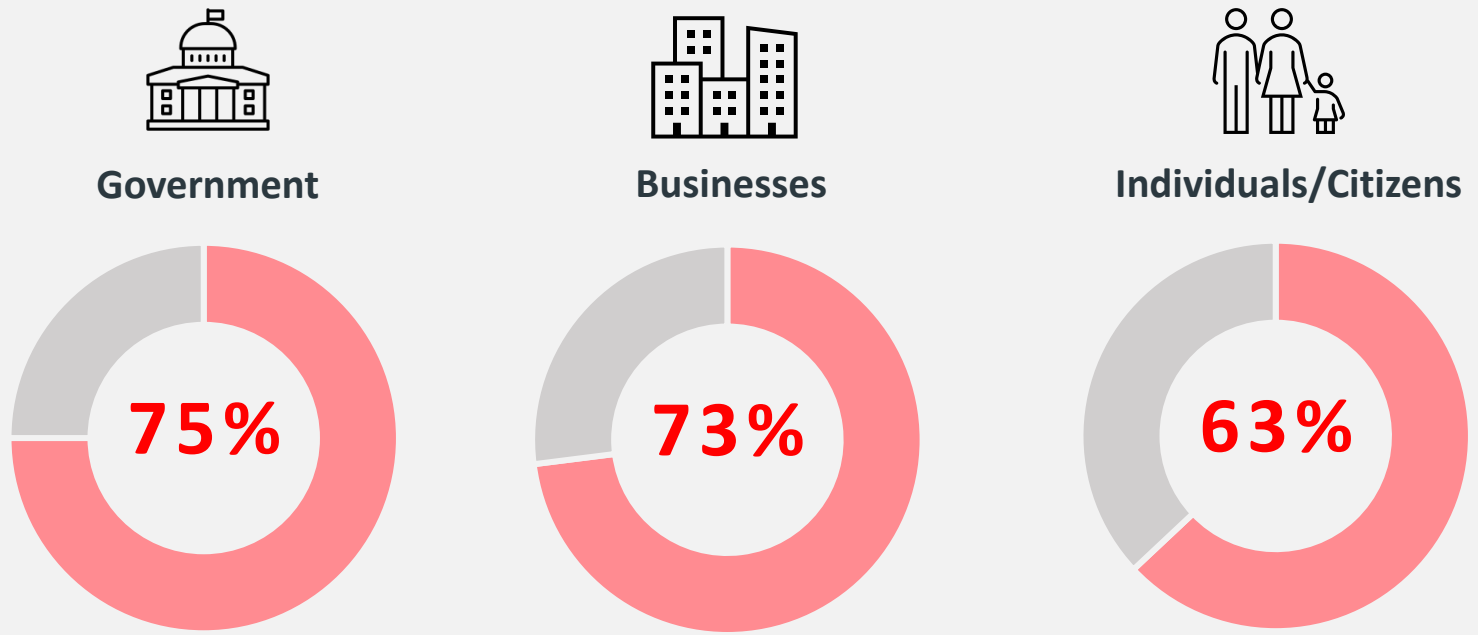
Albertans feel more knowledgeable on solar energy, the prairies on geothermal, Quebecers on bioenergy, and British Columbians on ocean energy.

Q. How familiar or not are you with the following types of energy/power? Base: Canadians
Showing know a little/a lot (Scale: Have not heard of this, don’t know very much, know a little, know a lot)

Significantly higher than one or more province

Who Should Focus on Increasing Use and Production of Renewables

% important/very important that each focus on use and production of renewables



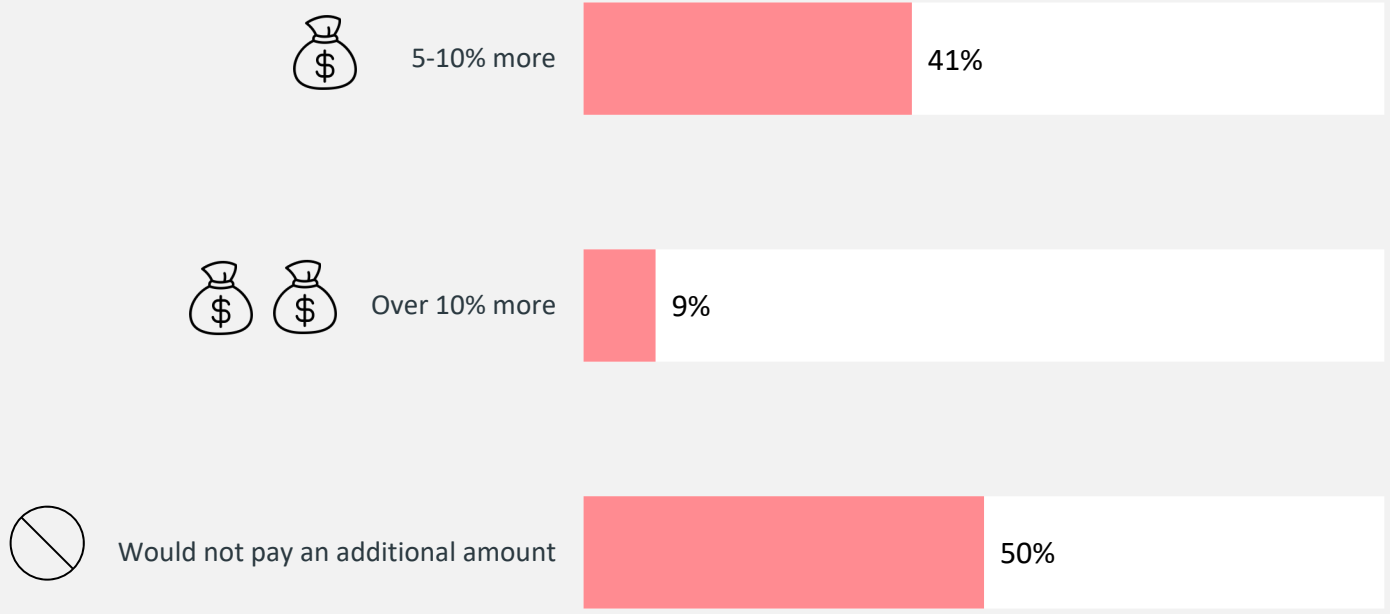
Canadians believe that government and business have equal responsibility to focus on increasing the use and production of renewables.

Canadians also believe individuals play an important role in increasing the use and production of renewables (63% agree it is important).

Q. In your opinion, how important or not is it that each of the following focus on increasing the production and use of renewable energy? Base: Canadians (n=1721)
Showing Important/Very important (Scale: Not at all important, somewhat important, important, very important)

How Much Canadians Will Pay for “Green” Power

For a guaranteed amount of power from renewable sources, would pay an additional…



Canadians who pay for utilities are split on willingness to pay more for “Green” power. Half are willing to pay more for Green power, and half are not.

Two-in-five (41%) would pay 5-10% more on their monthly bill, while one-in-ten (9%) would pay 10%+ more on their monthly bill.

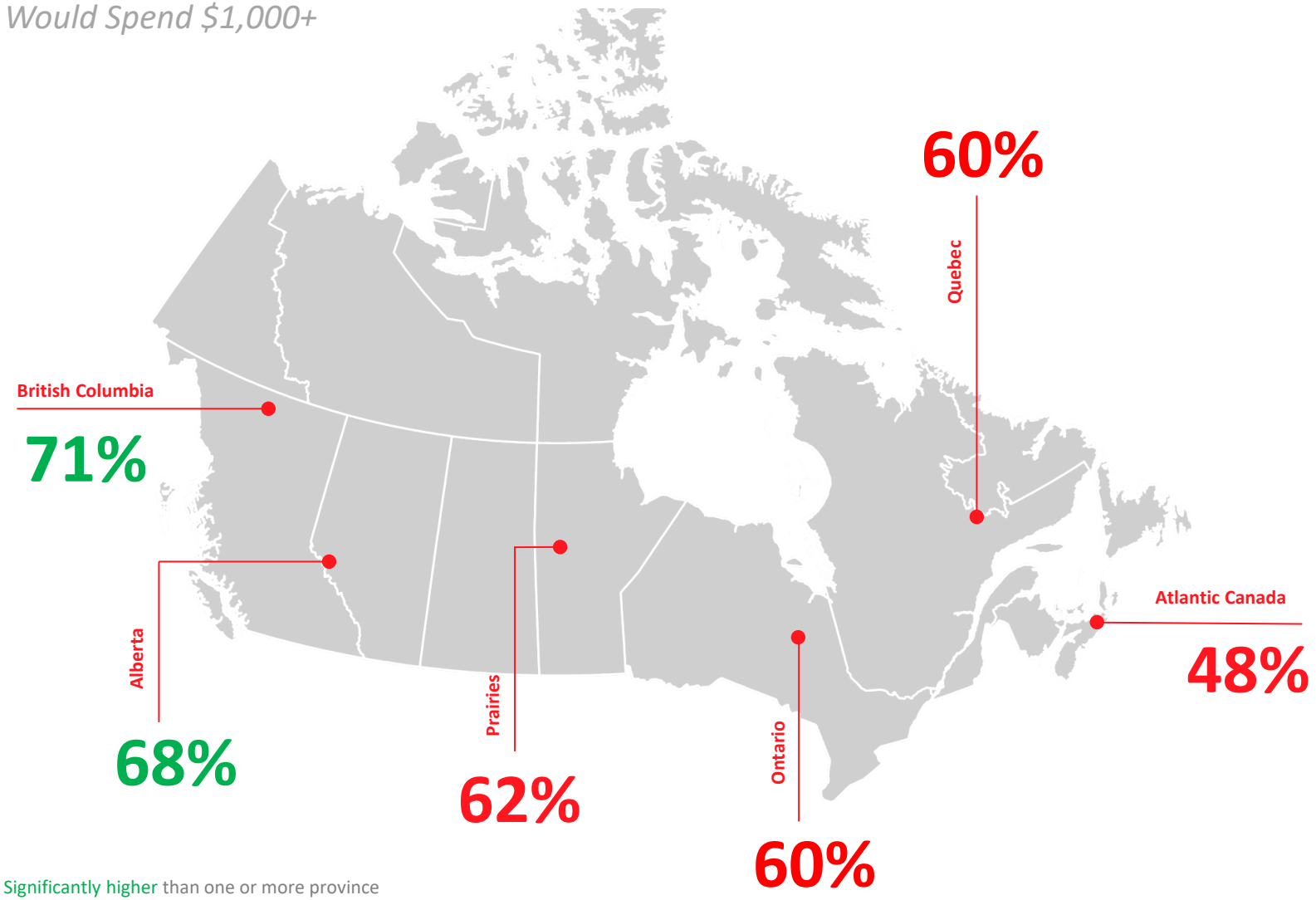
Albertans are the least likely to pay for green utilities. Considering they one of the most likely to make their own investment in their home to reduce fuel costs (see next slide), this **suggests Albertans prefer to take matters into their own hands when it comes to Going Green.**

Q. When it comes to your power/electricity, how much additional would you pay for a more “green” option, where there is a guaranteed amount of electricity generated from renewable sources (e.g., wind, solar, geothermal, etc.)? Base: Those who pay for utilities (n=1513)

Significantly higher than one or more province

Investing in Home for No Fuel Costs

Would Spend $1,000+



Among homeowners, Western Canadians are more likely than Eastern Canadians to invest in new technologies to achieve no month-to-month fuel costs (such as sealing/insulating, using solar, geothermal, or other renewable energy, high efficiency appliances, etc.).

Specifically, **Albertan and British Columbian homeowners are most likely** to spend $1,000 or more to achieve this.

62%

All Canadian Homeowners

Significantly higher than one or more province

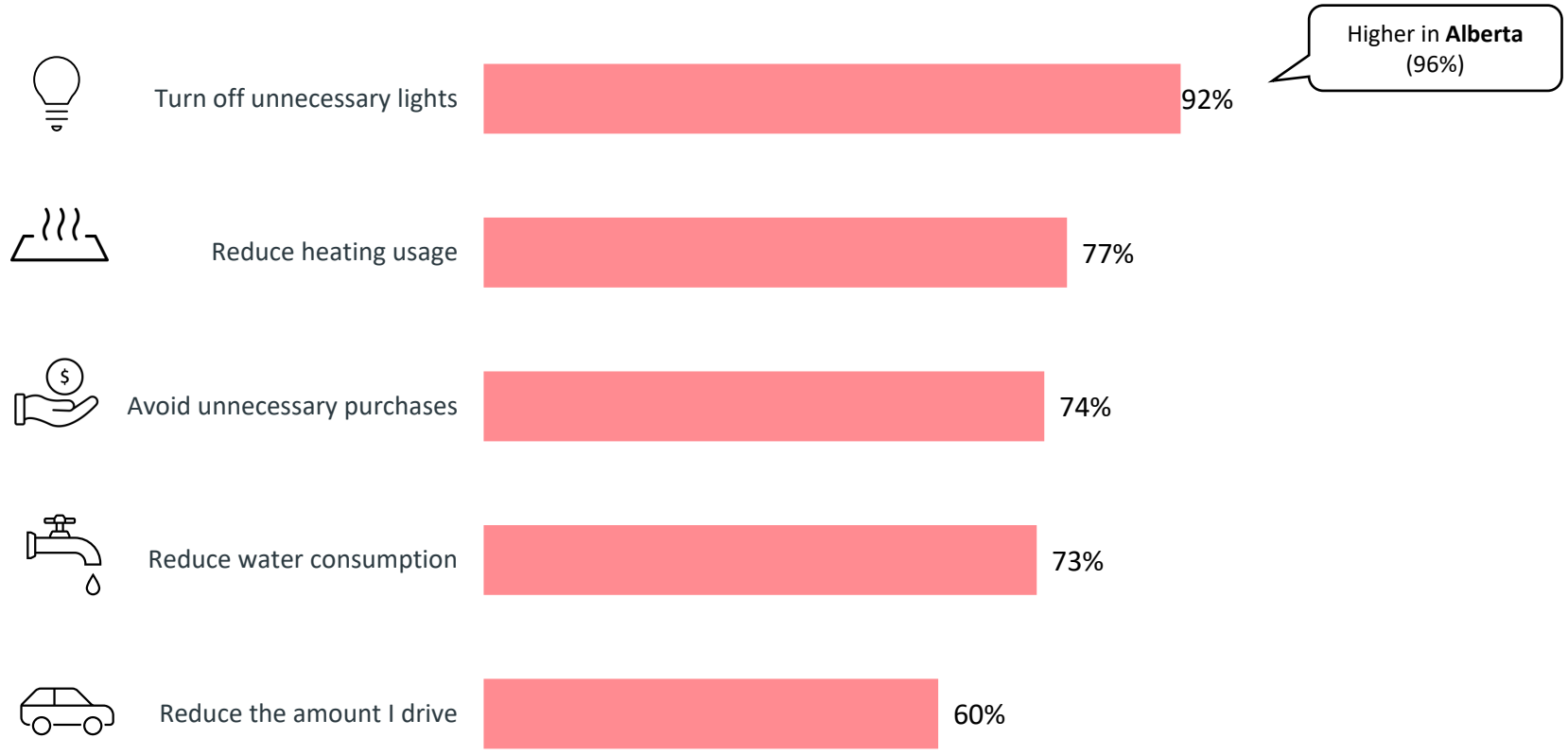
Q. If your house could have no month-to-month fuel costs by making upgrades or investments in new technologies (e.g., sealing/insulating, using solar, geothermal, or other renewable energy, high efficiency appliances, etc.) what is the most you would invest/pay to accomplish this? Base: Canadian homeowners (Total: n=1280, BC: n=112, AB: n=269, MB/SK: n=100, ON: n=431, QC: n=288, ATL: n=80)

How Canadians Reduce Energy Consumption

Always/Most of the Time

Canadians most often save energy by turning off lights, reducing heating usage, and avoiding unnecessary purchases.

Driving less is done the least often, which is consistent across all provinces.



Q. How often do you do each of the following to cut back on your energy consumption, if at all? Base: Canadians (n=1721)
Showing always/most of the time (Scale: Never, once in awhile, most of the time, always)

Likelihood to Purchase Energy-Saving Items (Next 5 Years)

Somewhat/very likely

	Total	BC	AB	MB/SK	ON	QC	ATL
n=	1280	112	269	100	431	288	80
High efficiency appliances	**52%**	48%	47%	58%	54%	52%	55%
Energy efficient windows	**37%**	27%	37%	33%	**39%**	**40%**	42%
Solar panels for my home	**26%**	23%	**30%**	22%	**29%**	19%	**36%**

Homeowners in Alberta, Ontario and Atlantic provinces are most likely to get solar panels in the next 5 years.

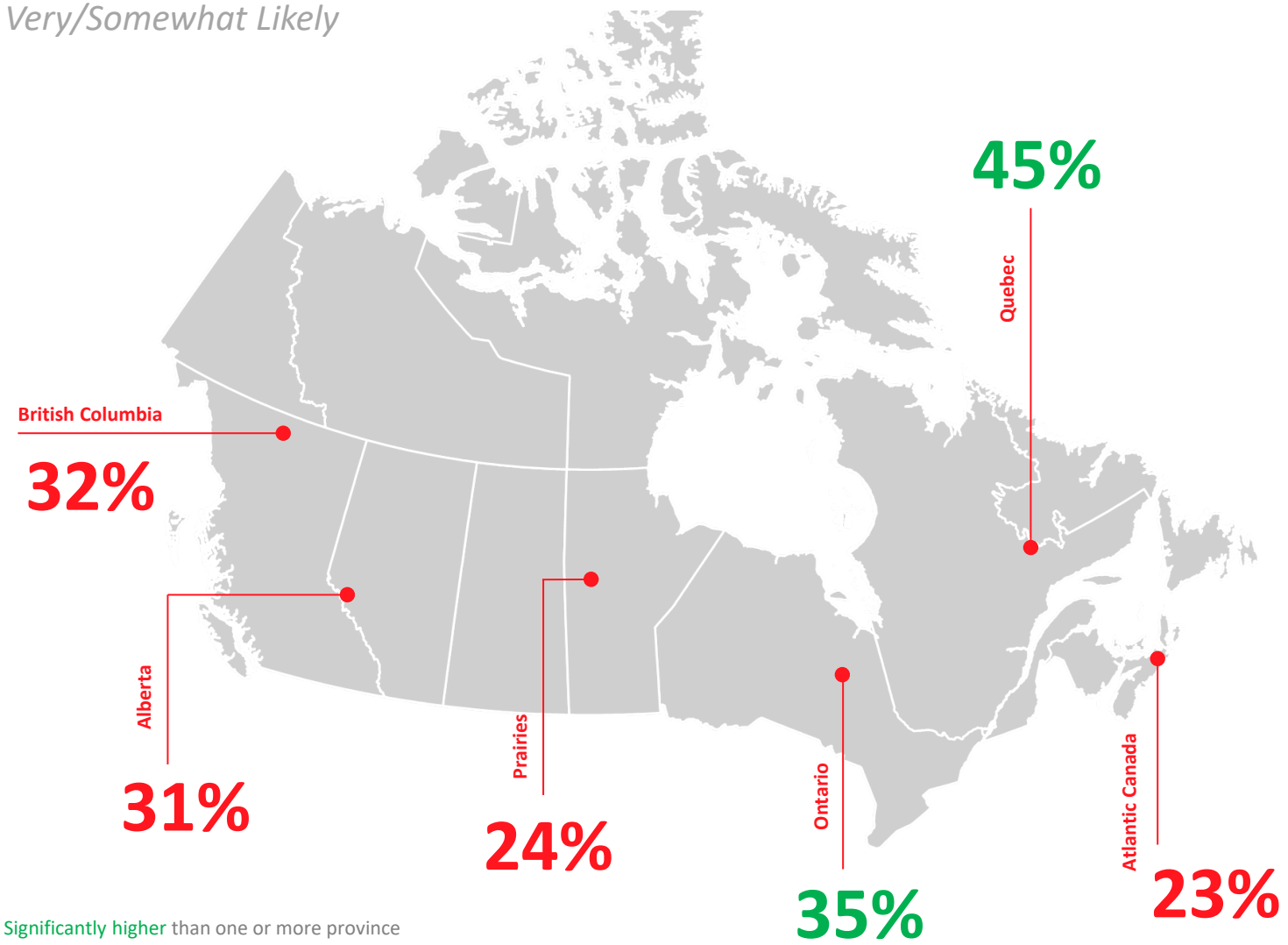
On the other hand, homeowners in Ontario and Quebec are more likely to invest in Energy efficient windows.

Q. How likely or not are you to purchase the following in the next 5 years? Base: Canadian homeowners (n=1280)
Showing somewhat/very likely (Scale: Very unlikely, somewhat unlikely, somewhat likely, very likely, I already have this)

Significantly higher than one or more province

Likelihood to Purchase an Electric Vehicle (If Gas Prices Hold Steady/Increase)

Very/Somewhat Likely



Significantly higher than one or more province

Quebecers and Ontarians are most likely to purchase an electric vehicle for their next vehicle.

Albertans and British Columbians are equally likely to purchase an electric vehicle for their next vehicle, which may contradict public perceptions of British Columbians often being viewed as "more green" than Albertans.

35%

All Canadians

Q6. How likely or not are you to get an electric vehicle or hybrid for your next vehicle, if gas prices hold steady or increase over the next few years? Base: Canadians (Total: n=1721, BC: n=156, AB: n=327, MB/SK: n=125, ON: n=603, QC: n=410, ATL: n=100) Showing Very/somewhat likely (Scale: Very unlikely, somewhat likely, neither likely or unlikely, somewhat likely, very likely)

Respondent Profile

Respondent Profile

PROVINCE	
British Columbia	14%
Alberta	11%
Saskatchewan	3%
Manitoba	4%
Ontario	39%
Quebec	23%
New Brunswick	2%
Nova Scotia	3%
Prince Edward Island	<1%
Newfoundland and Labrador	1%
AGE	
18-24	10%
25-34	17%
35-44	16%
45-54	16%
55-64	18%
65-74	16%
75+	8%
GENDER	
Male	49%
Female	51%

REGION TYPE	
Urban area	45%
Suburban area	37%
Rural area	18%
Prefer not to answer	1%
CHIDREN UNDER 18 IN HH	
Yes	27%
No	72%
EMPLOYMENT	
Working full time	44%
Working part time	8%
Self-employed / freelance work	5%
Student	5%
Homemaker	5%
Unemployed	4%
Retired	28%
I prefer not to answer	1%
OWN/RENT HOME	
Own	67%
Rent	32%

EDUCATION	
High school or less	31%
College (pre-university, technical training, certificate, accreditation or advanced diploma)	41%
University (certificate, diploma, bachelor/master/PhD degree)	28%
I prefer not to answer	1%
INCOME (ANNUAL)	
Under $40,000	23%
$40,000-$80,000	28%
Over $80,000	39%

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