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Public Response to Government “Rate Mitigation” Announcement



BRUCE POWER

177 Tie Road

R.R. 2, Tiverton

Ontario N0G 2T0



March 14, 2017

:: REPORT ::

STRICTLY PRIVILEGED AND CONFIDENTIAL

Key Findings

Key Findings

- Wynne's announcement came at a time when Ontarians don't feel like they are well protected when it comes to the reliability, quality – and especially price – of electricity in Ontario.
- [A majority are aware of the announcement, but only half have at least a general understanding of it.
- Ontarians welcome the announcement as good news, and responded favourably to the policies.
- While nearly half anticipate a decrease in their electricity bill, 36% remain skeptical, and 8% even anticipate an increase.
- The strongest policies coming out of the announcement are capping at inflation and increasing assistance programs for rural communities, low income and First Nations households.

– “Nuclear up, coal down” campaign

polling: monthly

– omnibus

Methodology

Methodology

- These are the results of a telephone survey of 603 randomly-selected Ontario residents, 18 years or older, between March 2nd and March 9th, 2017.
- Only one respondent per household was eligible to complete this survey.
- The survey includes both landline and cellphone respondents in order to ensure representation of cellphone only households. → 40%
- The sample has been weighted by age, gender and region to n=600 using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population.
- After weighting the data, the aggregated results are considered accurate to within $\pm 4.0\%$, 19 times out of 20.
- The margin of error will be larger within each sub-grouping of the sample.

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Segmentation: *Where did respondents come from?*

Regional Sample Sizes, weighted (n=600)

Toronto (Centre + Outer): n=129

West Metro Belt: n=75

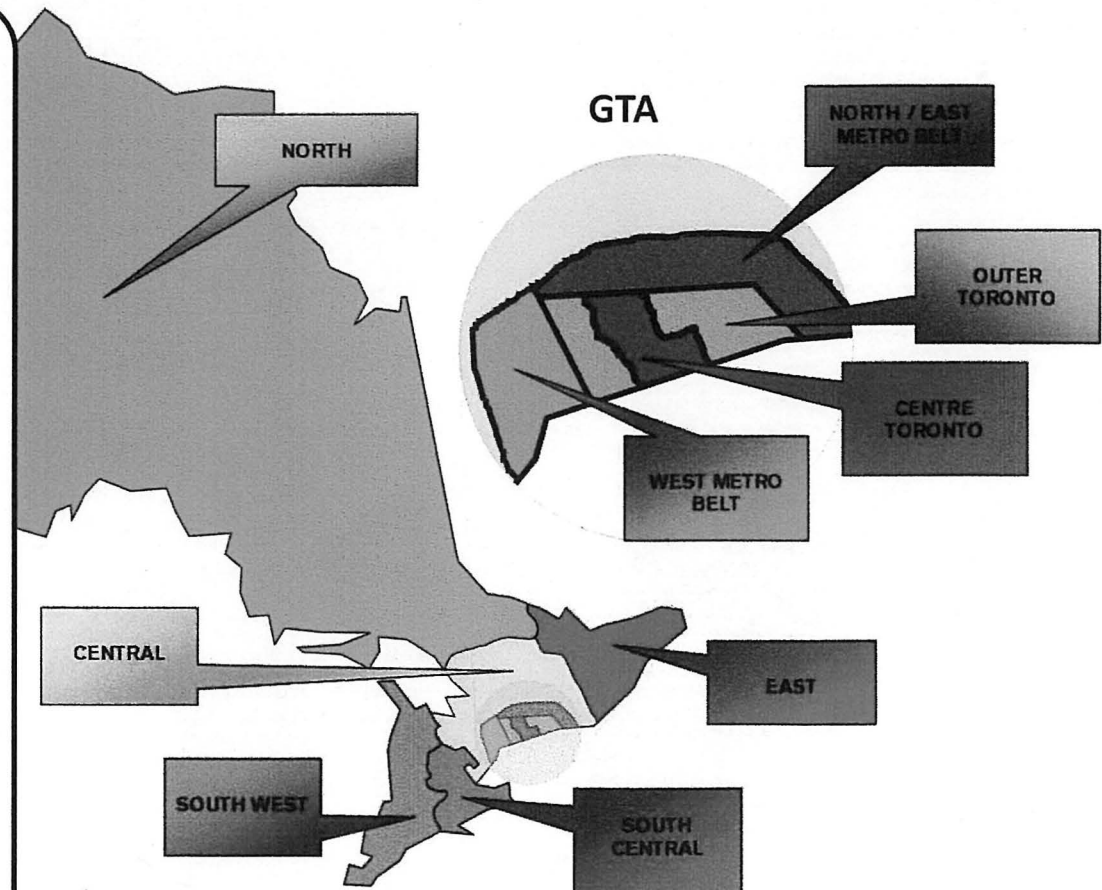
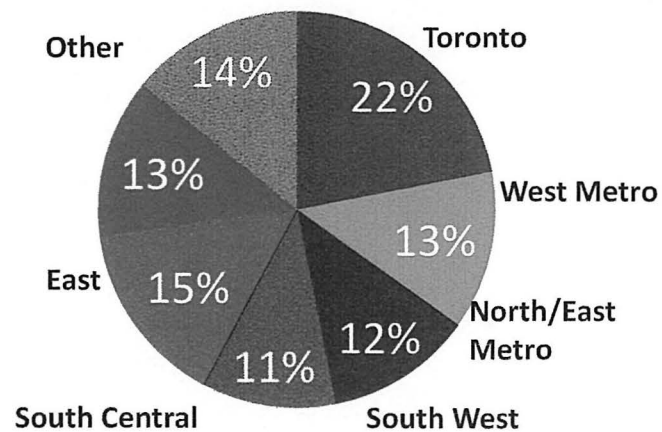
North/East Metro Belt: n=73

South West: n=68

South Central: n=90

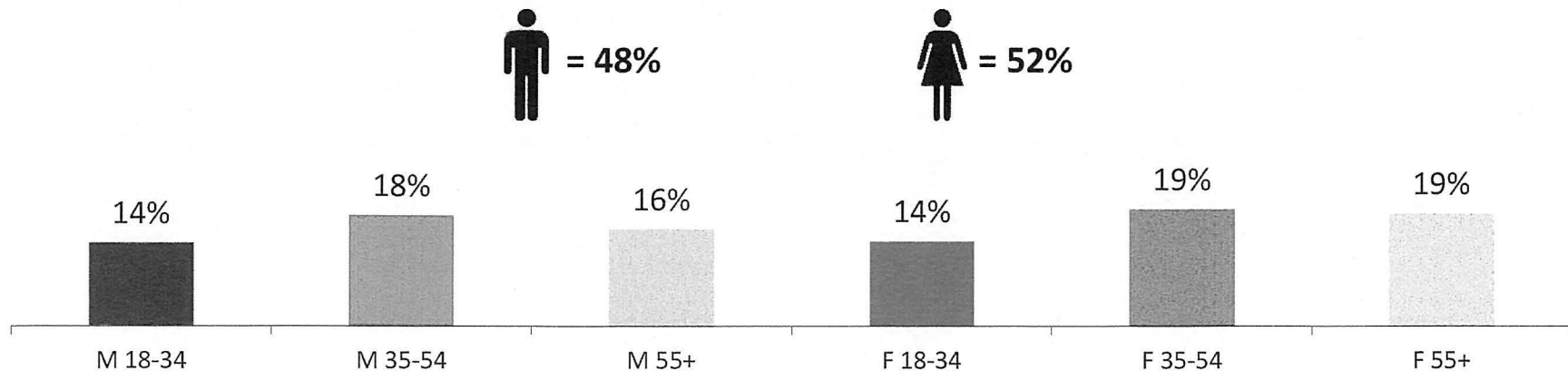
East: n=78

Other (North + Central): n=86

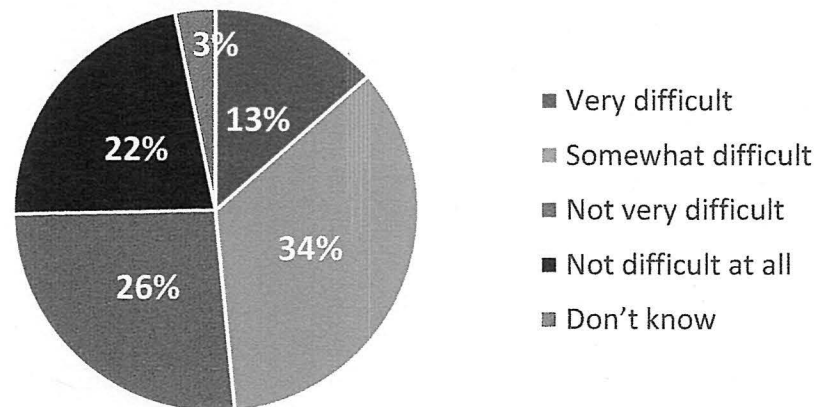


Demographics: *Respondent Profile*

Age-Gender



Making Ends Meet



Q: Thinking about your monthly bills, how difficult is it for you and your family to make ends meet?

Note: Refused (2%) not shown.

- biggest weakness
is how scary

Public Sentiment re: Electricity

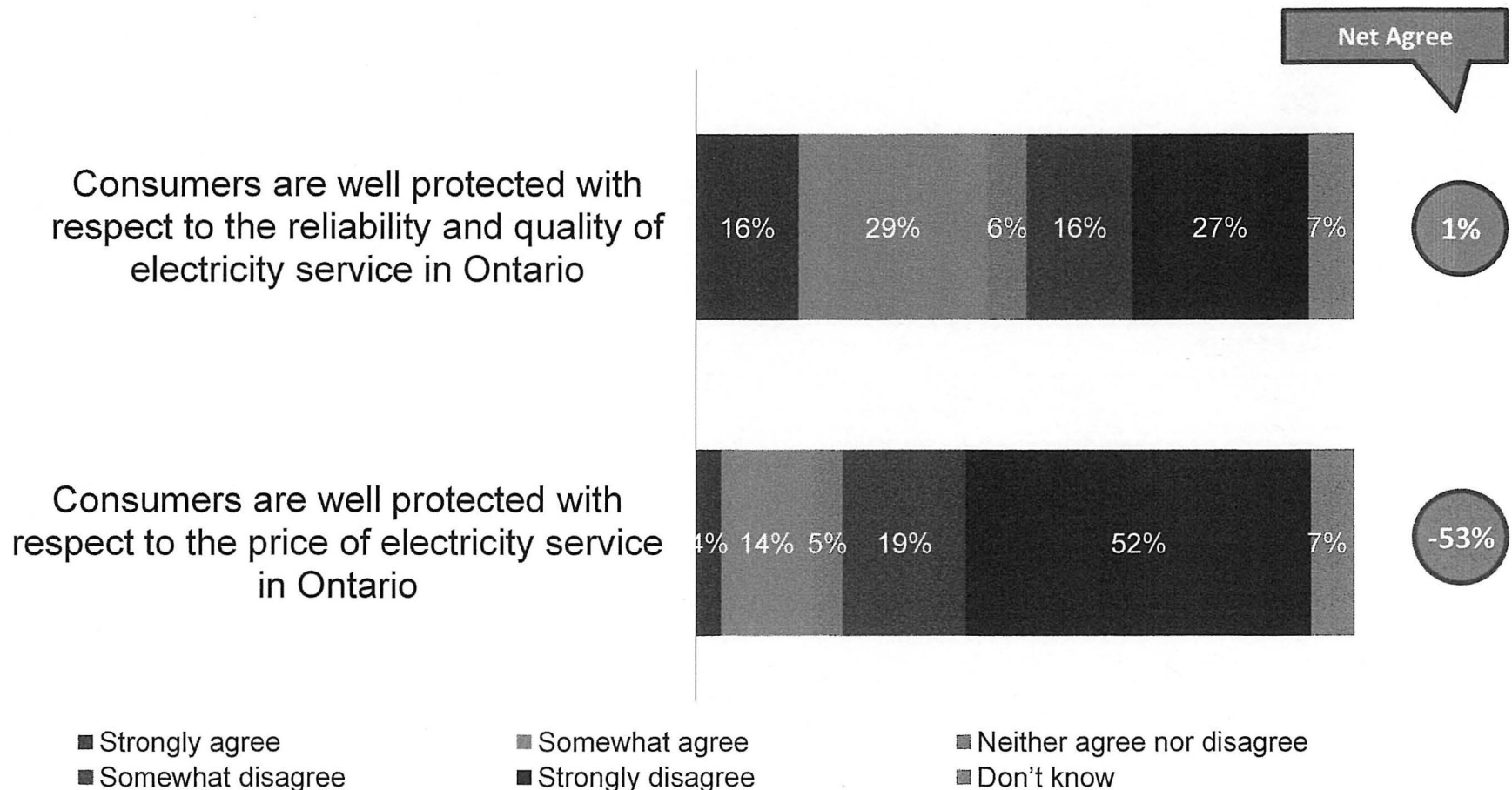
- Why are you doing?
- Who are you doing it for?

Public Sentiment - Electricity: most Ontarians do not feel they are protected on the price of electricity service in Ontario⁹



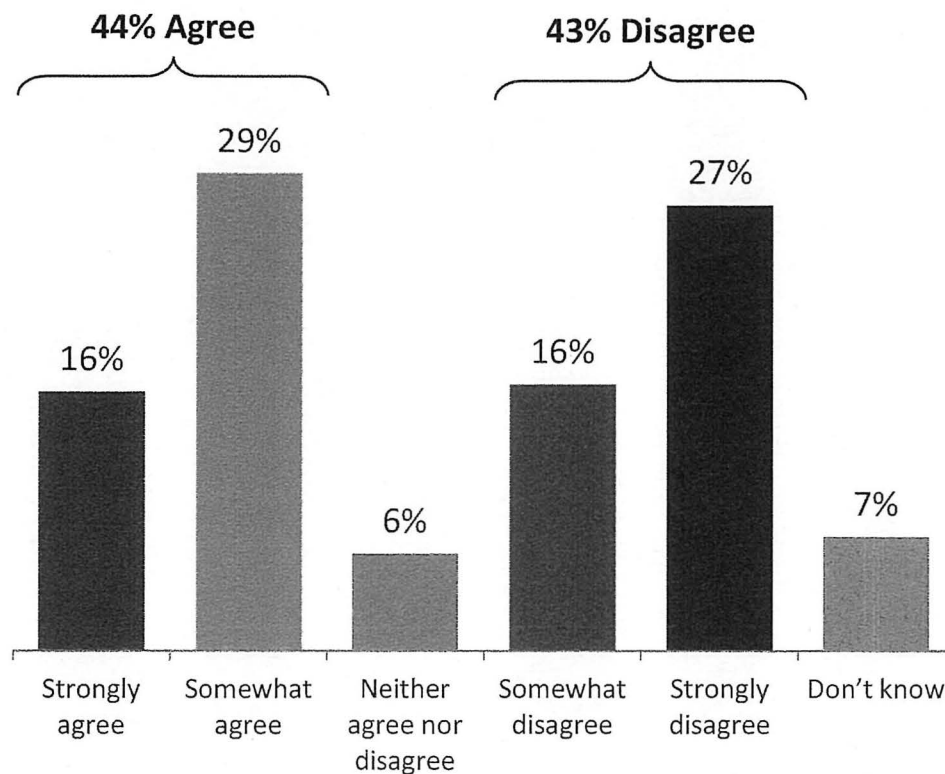
Do you agree or disagree with the following statements?

[asked of all respondents; n=600]



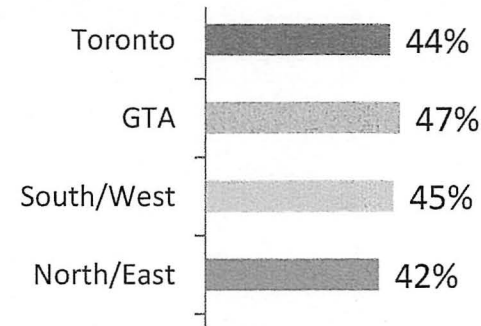
Reliability and Quality of Service: Young males most likely to feel protected vis-à-vis reliability and quality 10

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=600]
Consumers are well protected with respect to the reliability and quality of electricity service in Ontario.

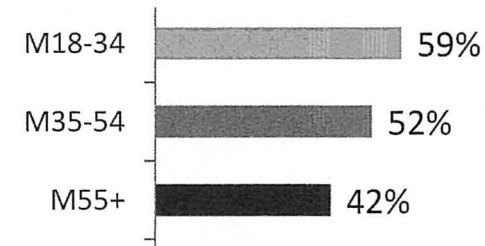


Sample Breakdown ▶▶ Those who say "agree"

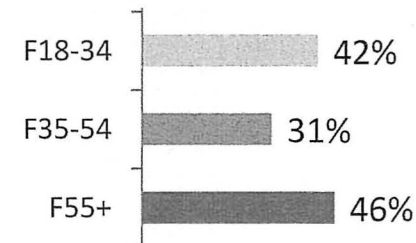
Region



Male/Age



Female/Age

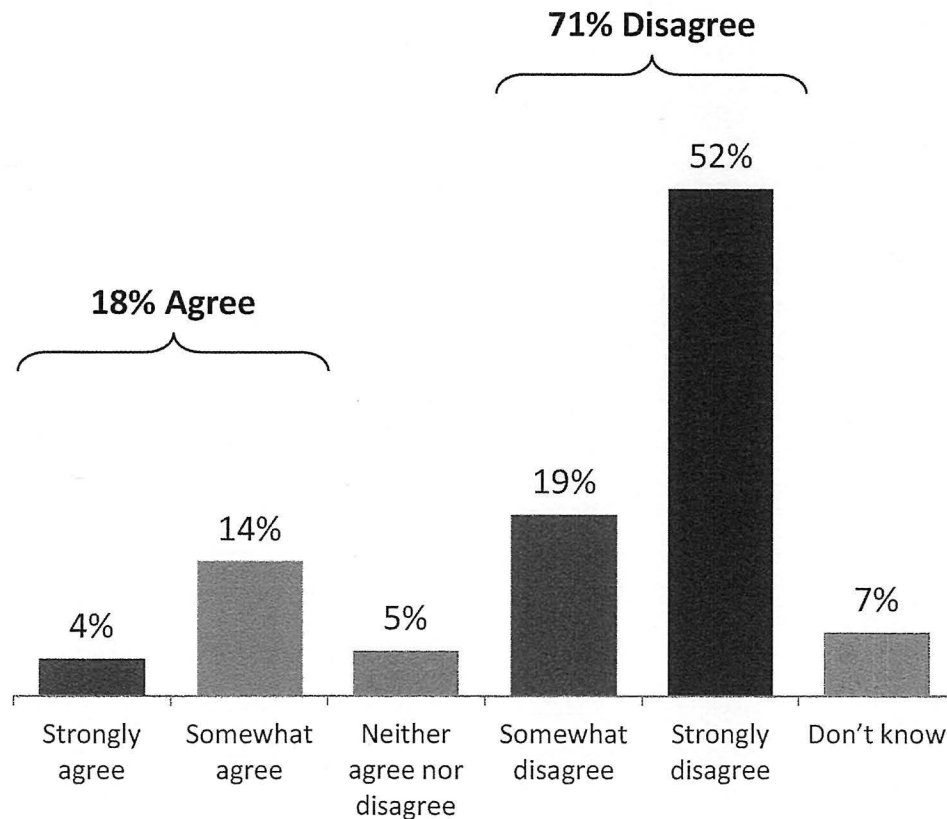


Price of Service: Young males also most likely to feel protected on price of electricity service in Ontario



Do you agree or disagree with the following statements?
[asked of all respondents; n=600]

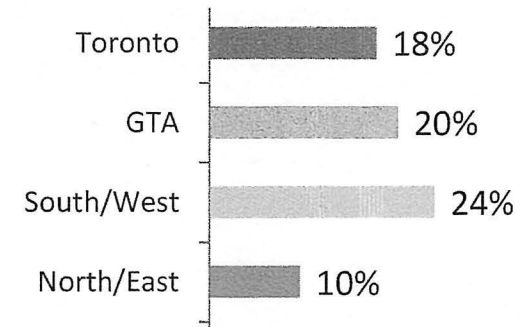
Consumers are well protected with respect to the price of electricity service in Ontario.



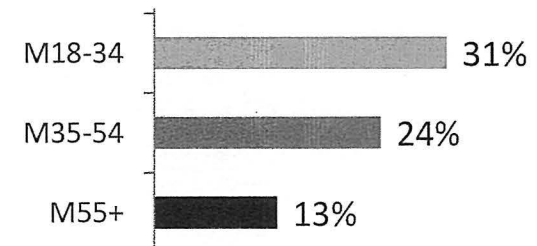
Sample Breakdown ►►

Those who say "agree"

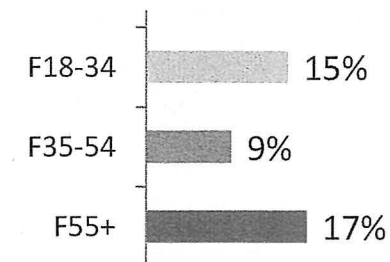
Region



Male/Age



Female/Age



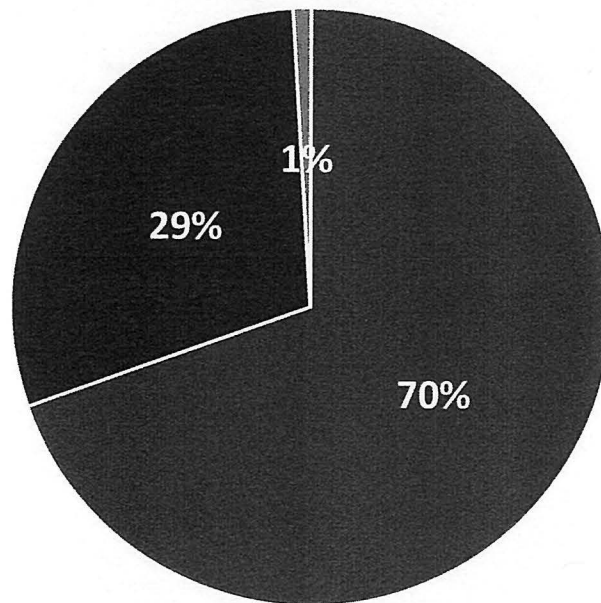
The Announcement

Unaided Awareness: 7-in-10 have RSH about electricity in the past week; highest among those aged 35+ (esp. male)



Have you read, seen or heard anything about electricity in Ontario in the past week or so?

[asked of all respondents; n=600]

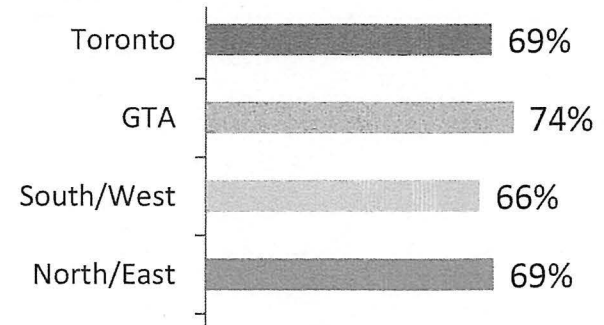


■ Yes ■ No ■ Don't know

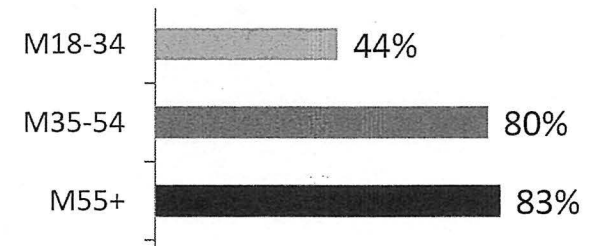
Sample Breakdown ▶▶

Those who say "yes"

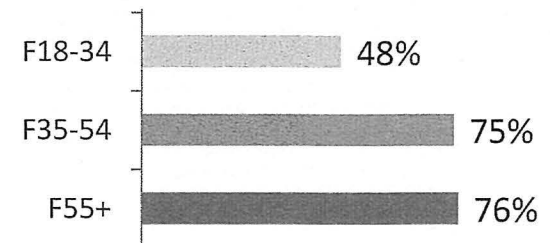
Region



Male/Age



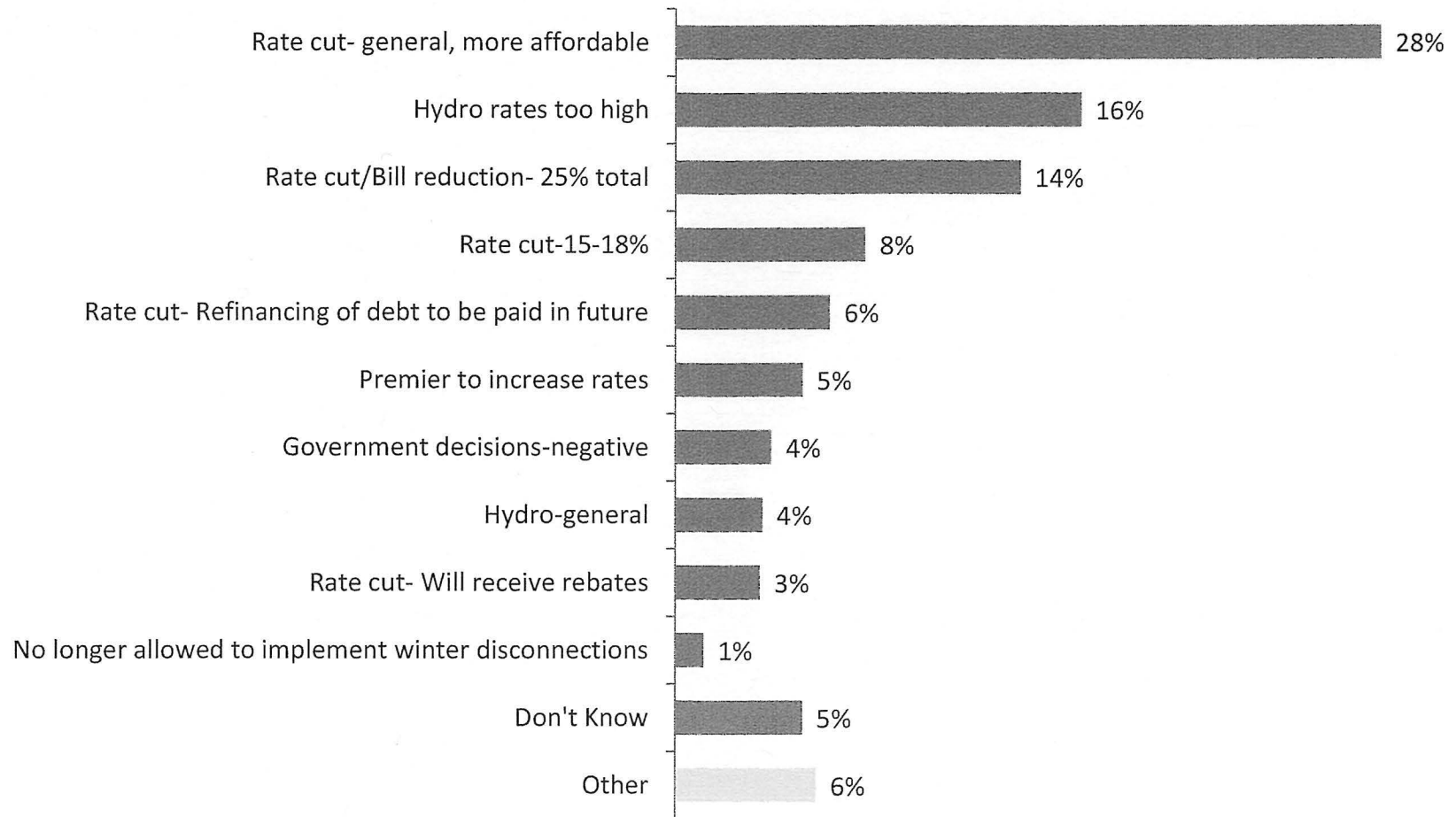
Female/Age



Recall: References to rate reductions dominate list of recalled RSH about electricity in Ontario



And what have you read, seen or heard about electricity in Ontario?
[asked of those who have RSH something; n=417]



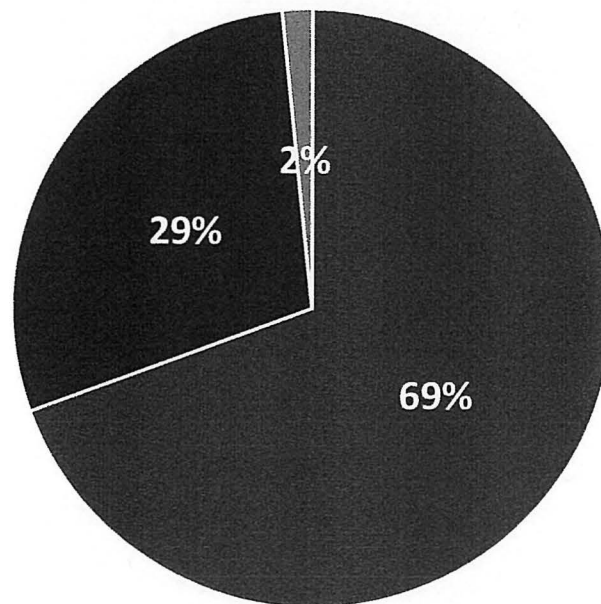
NOTE: Refused/Bad Respondent (<1%) not shown

Aided Awareness: With a prompt, awareness remains at 7-in-10; awareness increases with age



As you may have heard, Premier Kathleen Wynne recently made an announcement about electricity rates in Ontario. Have you heard about this announcement?

[asked of all respondents; n=600]

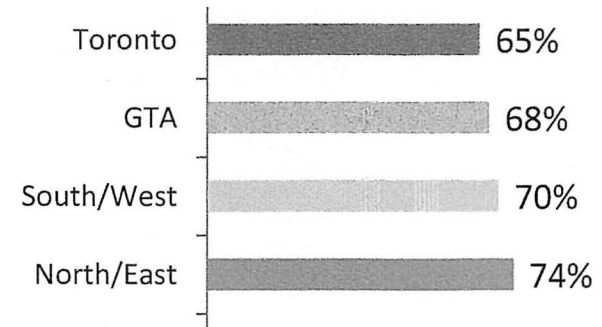


■ Yes ■ No ■ Don't know

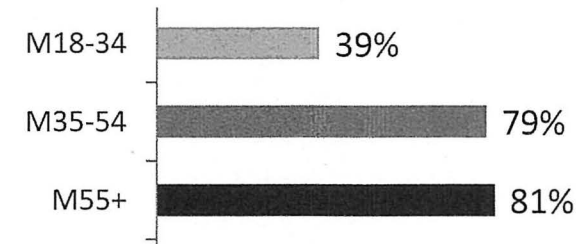
Sample Breakdown ►►

Those who say "yes"

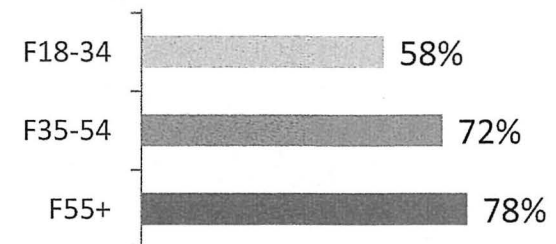
Region



Male/Age



Female/Age

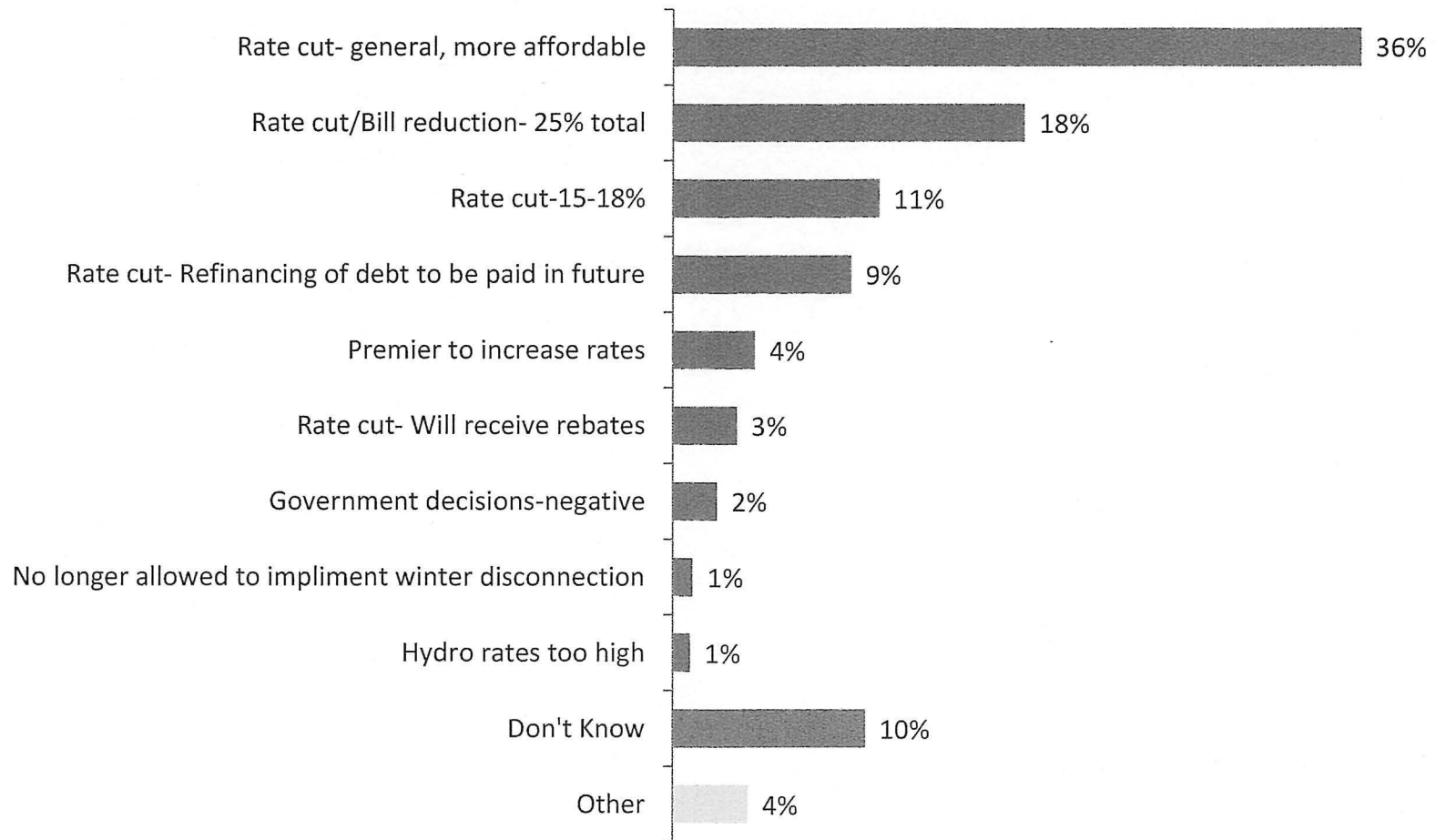


Recall: References to rate reductions dominate list of recalled RSH about announcement

Q

What, specifically, have you heard about this announcement?

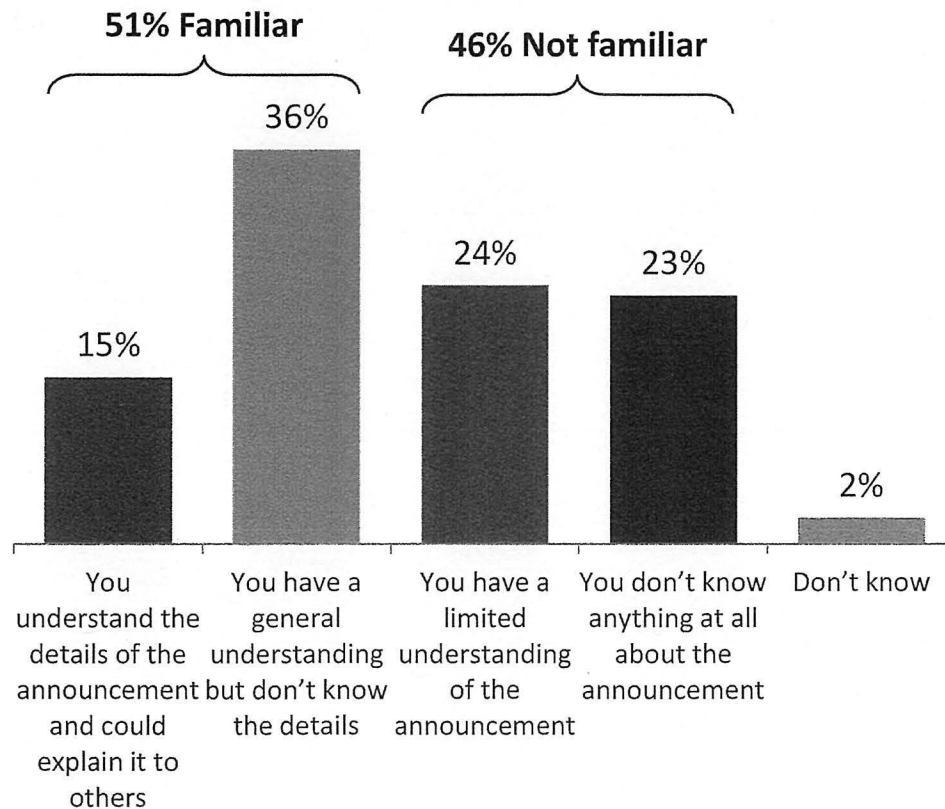
[asked of those who have RSH something about the announcement; n=416]



NOTE: Refused (<1%) not shown

Familiarity: Majority familiar with announcement; highest in GTA, and those aged 35 to 54

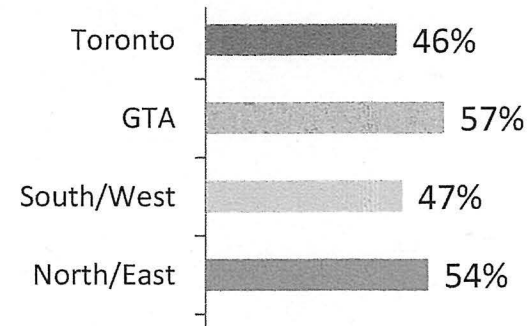
Q Premier Kathleen Wynne announced that Ontarians will get an average 25 percent reduction on their electricity rates, and rates will be capped at the rate of inflation for the next 4 years. How familiar are you with this recent announcement? Would you say ...?
[asked of all respondents; n=600]



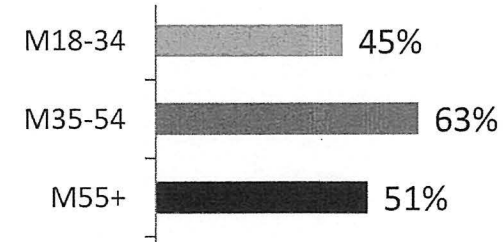
Sample Breakdown ►►

Those who are "familiar"

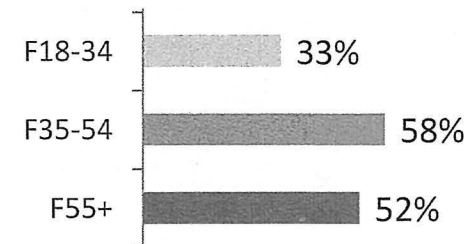
Region



Male/Age



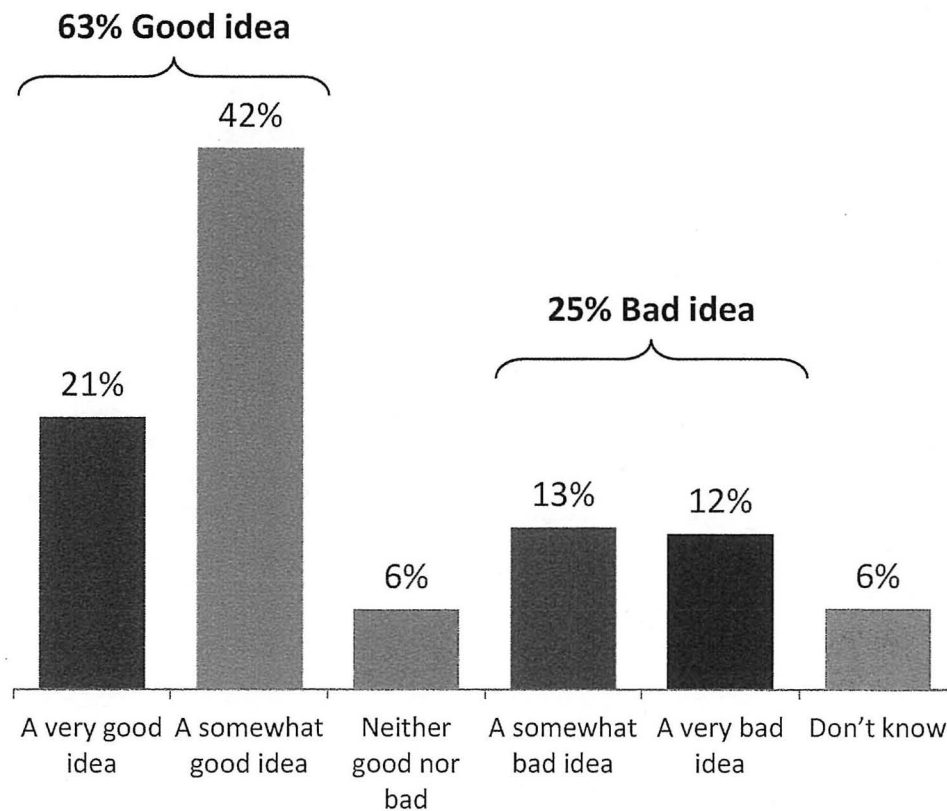
Female/Age



Good or Bad Idea?: Most feel the announcement is a good idea, especially those under age 35

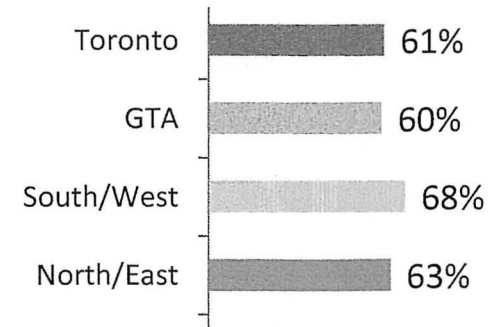
18

Q Based on what you know about this announcement, does it sound like (ROTATE) a good idea or a bad idea?
[asked of those with at least a limited familiarity with the announcement; n=449]

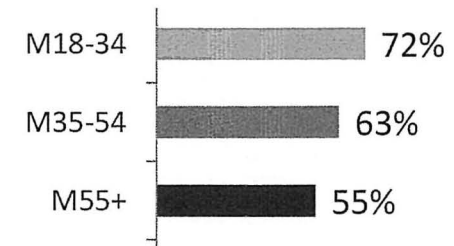


Sample Breakdown ▶▶ Those who say "good idea"

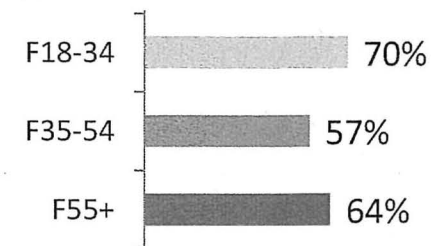
Region



Male/Age



Female/Age



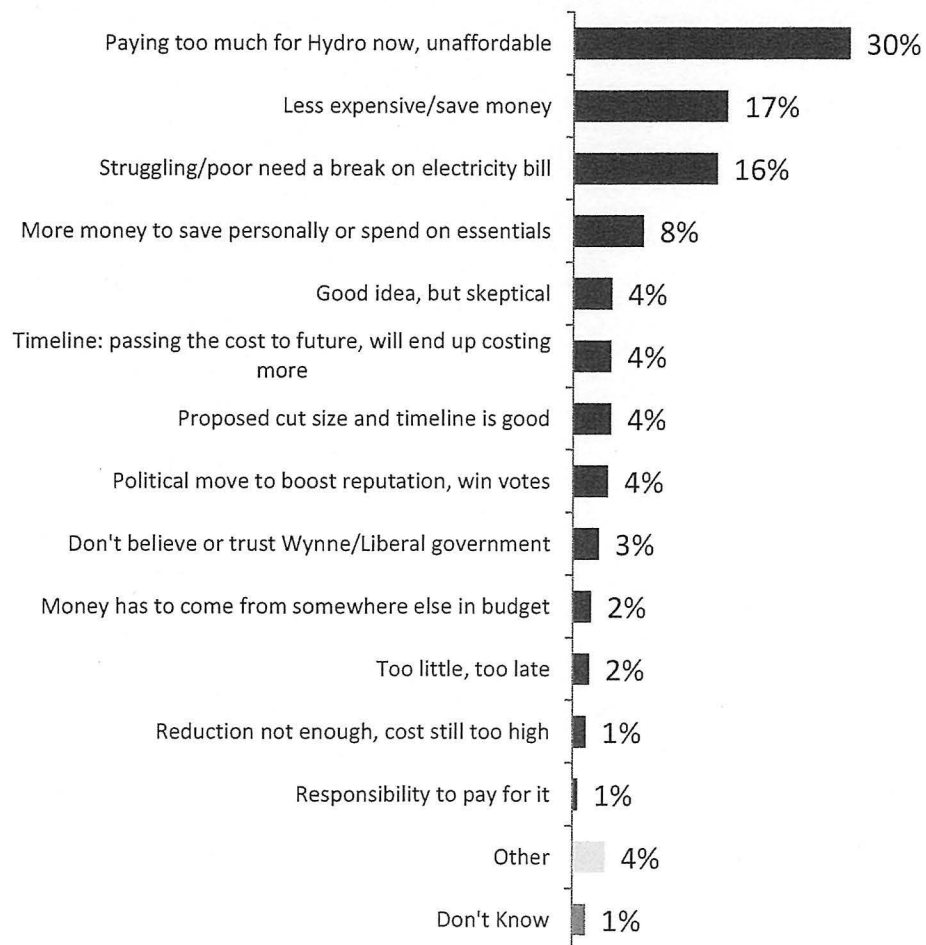
Why a Good/Bad Idea: Those who like the idea say it addresses high rates; detractors feel it'll end up costing more



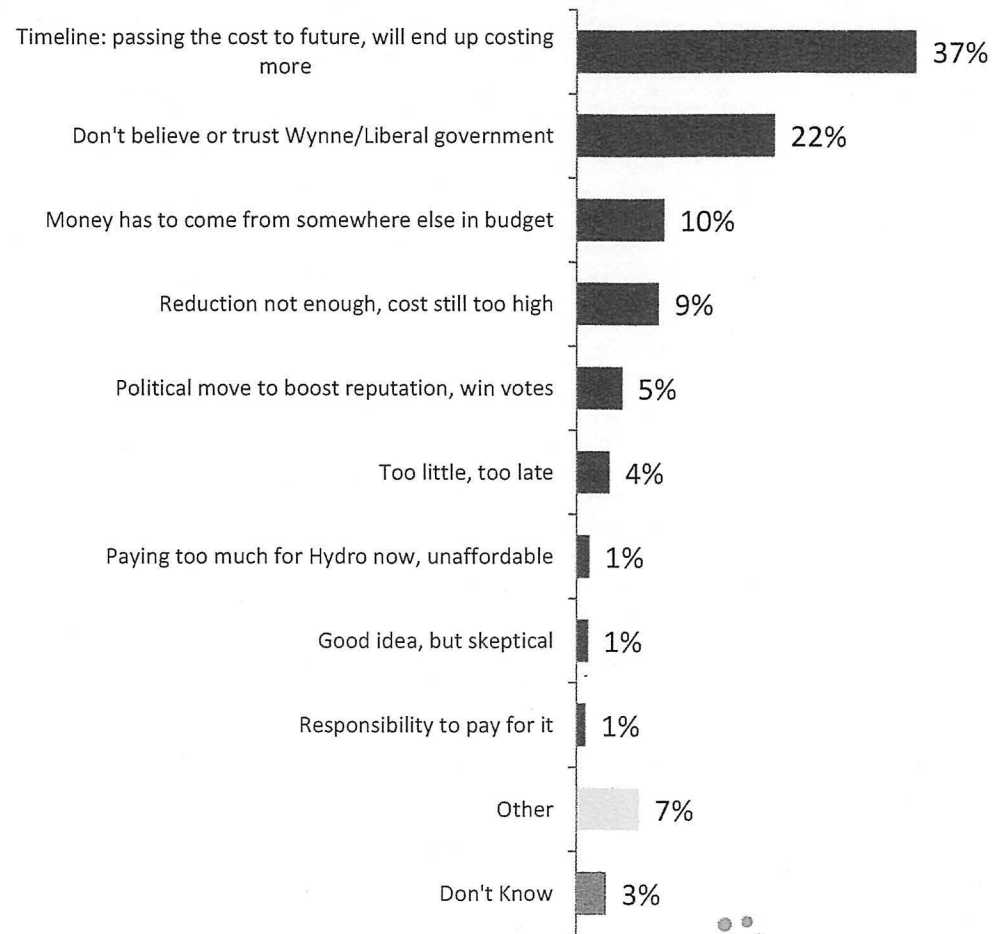
Why do you think it is a [good/bad] idea?

[asked of those who think the announcement is either a good or bad idea]

Think it's a good idea (n=283)



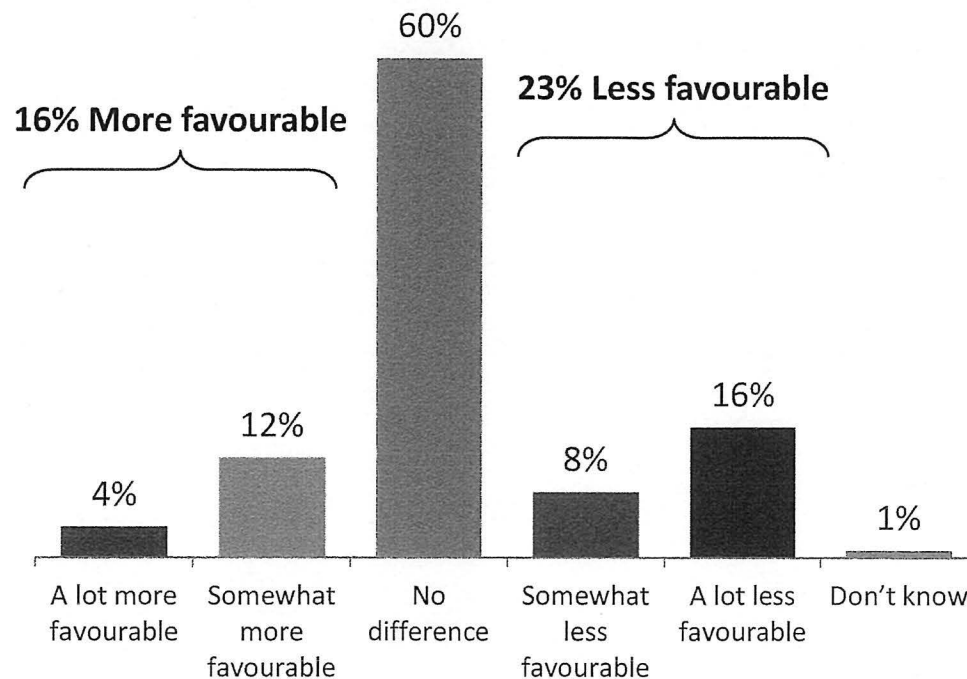
Think it's a bad idea (n=111)



Impact on Gov't Favourability: For most, the announcement²⁰ has no impact on how they feel towards the government

Q And, does what you know about this announcement leave you feeling more or less favourable towards the Ontario government, or does it make no difference?

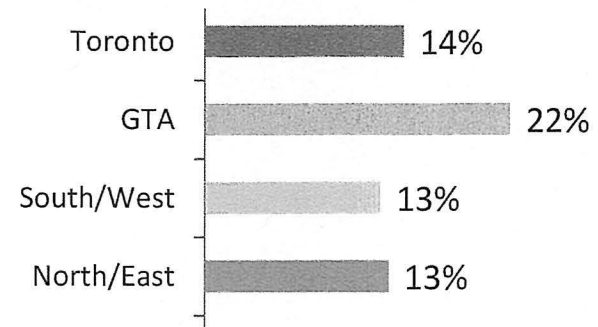
[asked of those with at least a limited familiarity with the announcement; n=449]



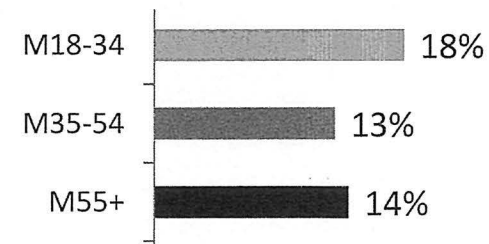
Sample Breakdown ►►

Those who say "more favourable"

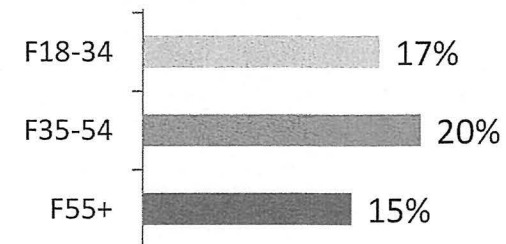
Region



Male/Age



Female/Age

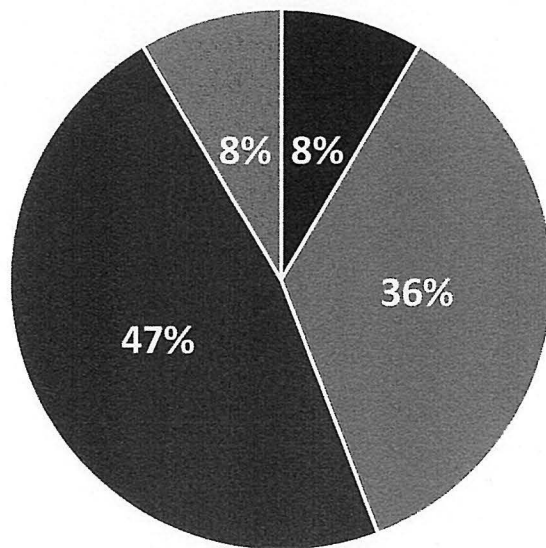


Impact on Bill: Almost half anticipate a decrease in their electricity bill, particularly Toronto residents and males 55+



As a result of this announcement, do you think your home electricity bill will increase, decrease or stay about the same?

[asked of those with at least a limited familiarity with the announcement; n=449]

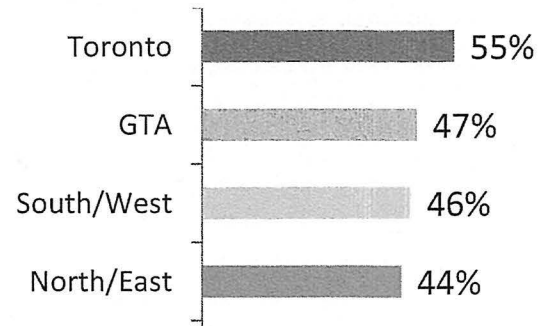


■ Increase
 ■ Decrease
 ■ Stay about the same
 ■ Don't know

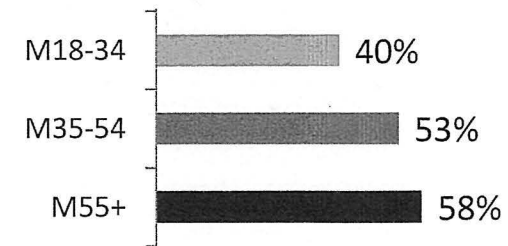
Sample Breakdown ▶▶

Those who say "decrease"

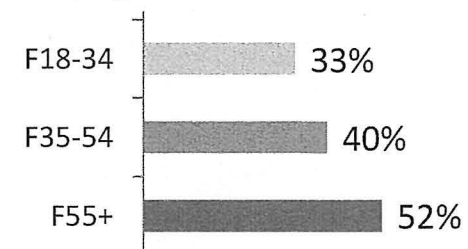
Region



Male/Age



Female/Age



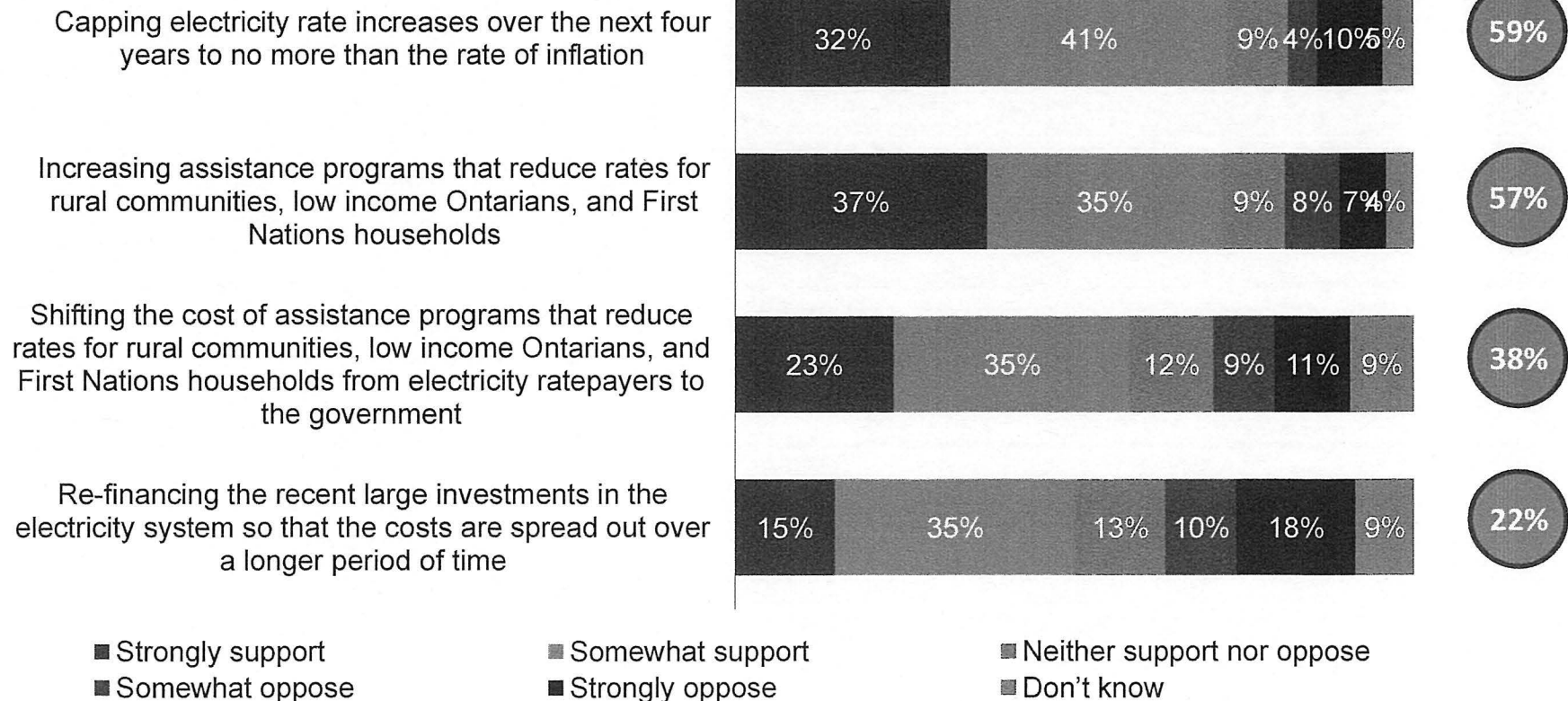
The Details: capping rates and assistance programs most popular policies; re-financing large investments least popular

Q

I am going to read you some of the specific details of the announcement. For each statement I read to you, I'd like you to tell me if you support or oppose that policy.

[asked of all respondents; n=600]

Net Support



Good or Bad Idea? (Pre vs Post): Fewer think it's a good idea after hearing more about it

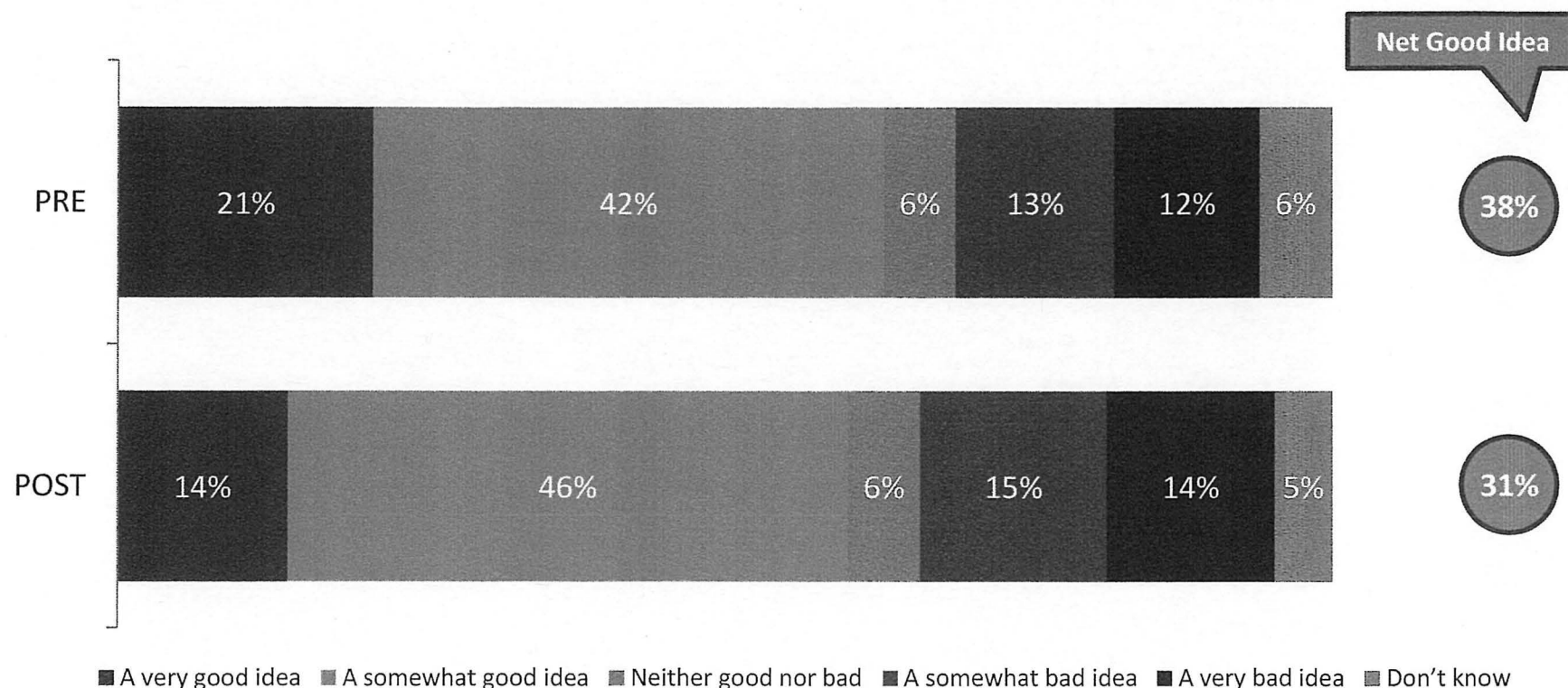
23



Based on what you know about this announcement, does it sound like (ROTATE) a good idea or a bad idea?
AND

Now we have talked some more about the government's electricity rate announcement, does it sound like (ROTATE) a good idea or a bad idea?

[limited to those with at least a limited familiarity with the announcement in order to compare pre- vs post-discussion; n=449]



Opinion of Announcement by Difficulty Making Ends Meet:²⁴

“Good idea” higher among those who struggle more.



Thinking about your monthly bills, how difficult is it for you and your family to make ends meet. Is it... ?

AND Now we have talked some more about the government’s electricity rate announcement, does it sound like (ROTATE) a good idea or a bad idea?

[asked of all respondents; n=600]

	Not at all/Not Very difficult	Somewhat difficult	Very difficult
Very good idea	16%	12%	18%
Somewhat good idea	40%	58%	45%
Neither good nor bad	7%	4%	4%
Somewhat bad idea	18%	10%	10%
Very bad idea	14%	11%	17%
Don’t know	5%	6%	7%
NET GOOD IDEA	25%	48%	36%

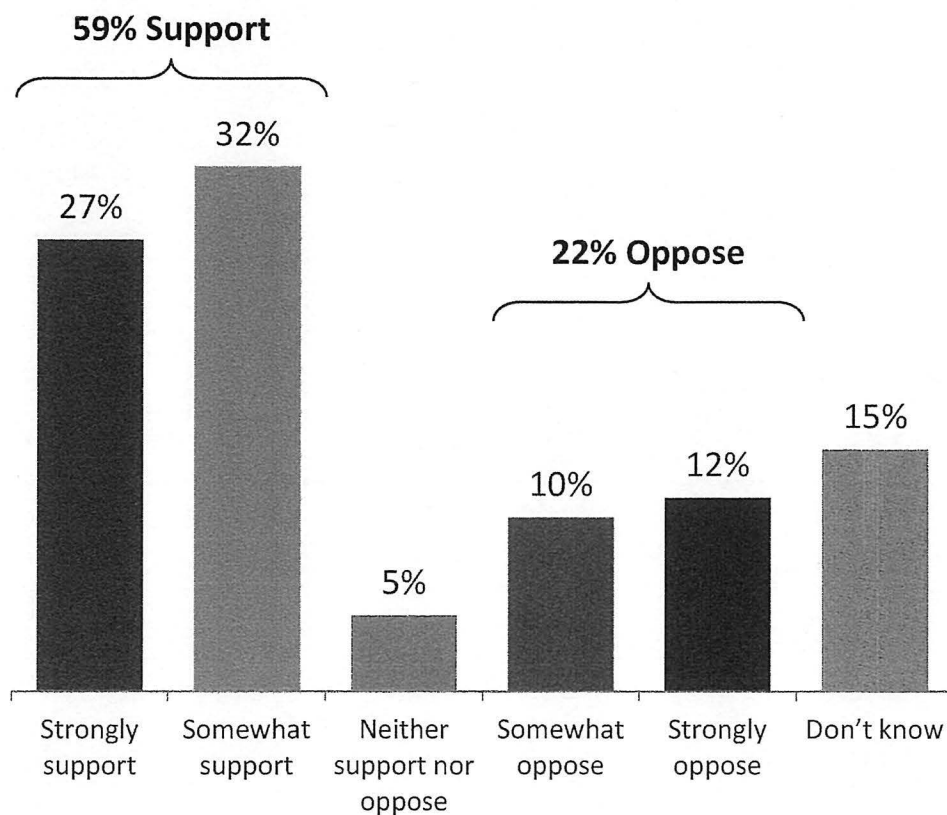
Attitudes Toward Nuclear

Need
other valued
stakeholders
to provide
supportive statements

General Support: 6-in-10 support nuclear energy; highest among males 35 to 54

26

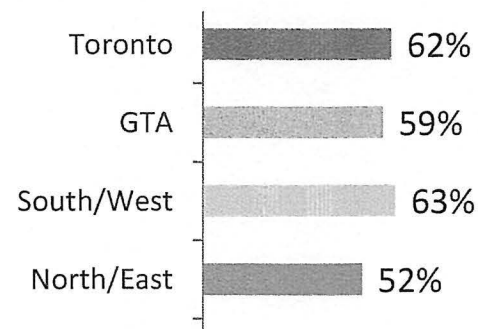
Q Now, based on your general feeling, please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose nuclear as a way of producing energy. Do you ...?
[asked of all respondents; n=600]



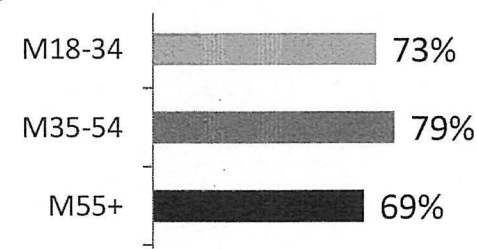
Sample Breakdown ▶▶

Those who say "support"

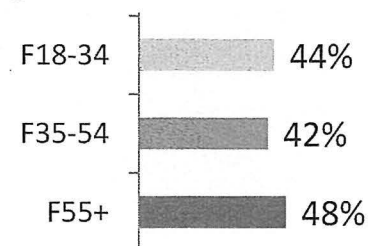
Region



Male/Age



Female/Age



Opinion of Announcement by Support for Nuclear: “Good idea” does not appear tied to support for nuclear energy



Now, based on your general feeling, please tell me whether you strongly support, somewhat support, somewhat oppose, or strongly oppose nuclear as a way of producing energy. Do you ... ?

AND Now we have talked some more about the government’s electricity rate announcement, does it sound like (ROTATE) a good idea or a bad idea?

[asked of all respondents; n=600]

	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Don’t know
Very good idea	21%	11%	16%	15%	16%
Somewhat good idea	33%	62%	48%	44%	38%
Neither good nor bad	7%	5%	2%	7%	1%
Somewhat bad idea	13%	13%	15%	11%	16%
Very bad idea	21%	6%	11%	17%	7%
Don’t know	4%	3%	8%	6%	22%
NET GOOD IDEA	20%	53%	39%	31%	31%

Messages: All messages test well, especially 30%/30%

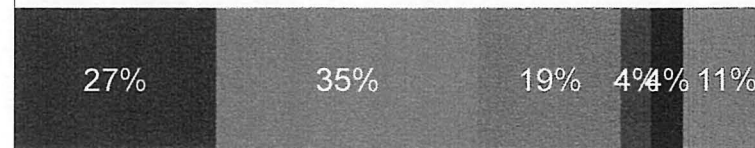
Q

I am going to read you some statements regarding Bruce Power a nuclear power generation company, which is located near Kincardine [pronounced: kin-CAR-din] Ontario. For each one, I'd like you to tell me if it leaves you more likely to support or oppose nuclear as a way of producing energy. If it makes no difference, please say so.

[asked of all respondents; n=600]

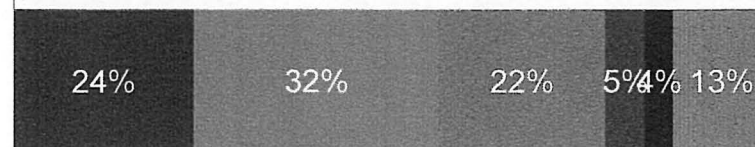
Net Support

As part of Ontario's Long Term Energy Plan, Bruce Power will generate 30 percent of the province's electricity at 30 percent less than the average residential price of power



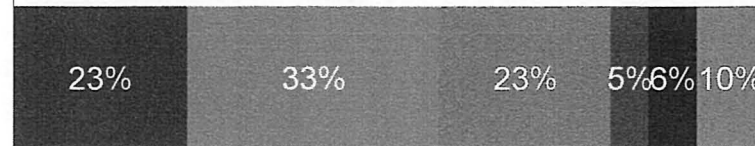
53%

Ontario's Bruce nuclear power plant is a leading global supplier of Cobalt60 a radioactive isotope used to sterilize 40 per cent of the world's single-use medical equipment



47%

In order to meet Ontario's electricity demand, Bruce Power is beginning to upgrade and refurbish its nuclear plants

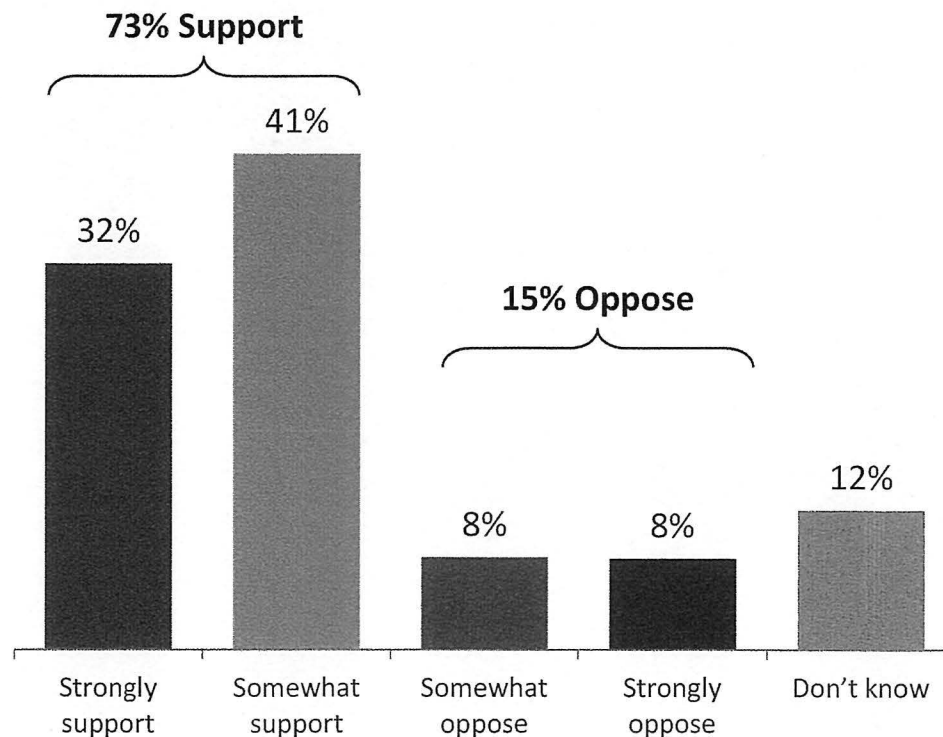


45%

■ Much more likely to support ■ Somewhat more likely to support ■ No difference
 ■ Somewhat more likely to oppose ■ Much more likely to oppose ■ Don't know

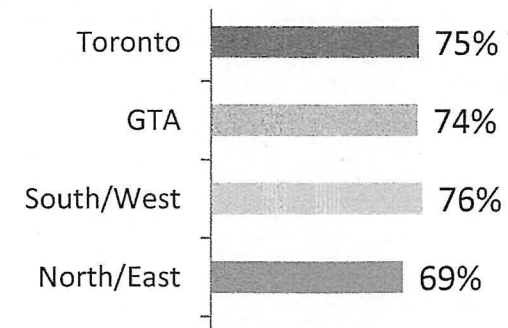
Refurbishment: Nearly 3-in-4 support refurbishment; higher²⁹ among men than women

Q Many large power-generating plants in Ontario with various fuel sources will have to be replaced over the next 10 years or so because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Ontario future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose upgrading and refurbishing existing nuclear power plants?
[asked of all respondents; n=600]

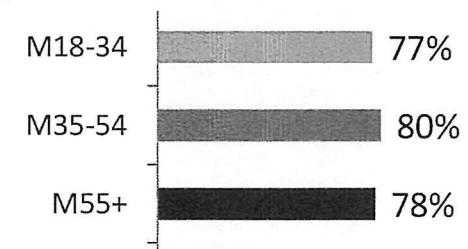


Sample Breakdown ►► Those who say "support"

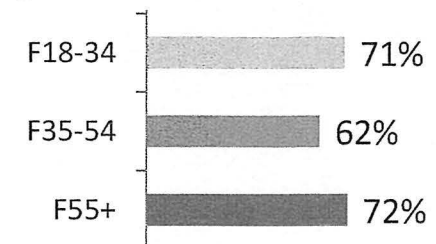
Region



Male/Age



Female/Age

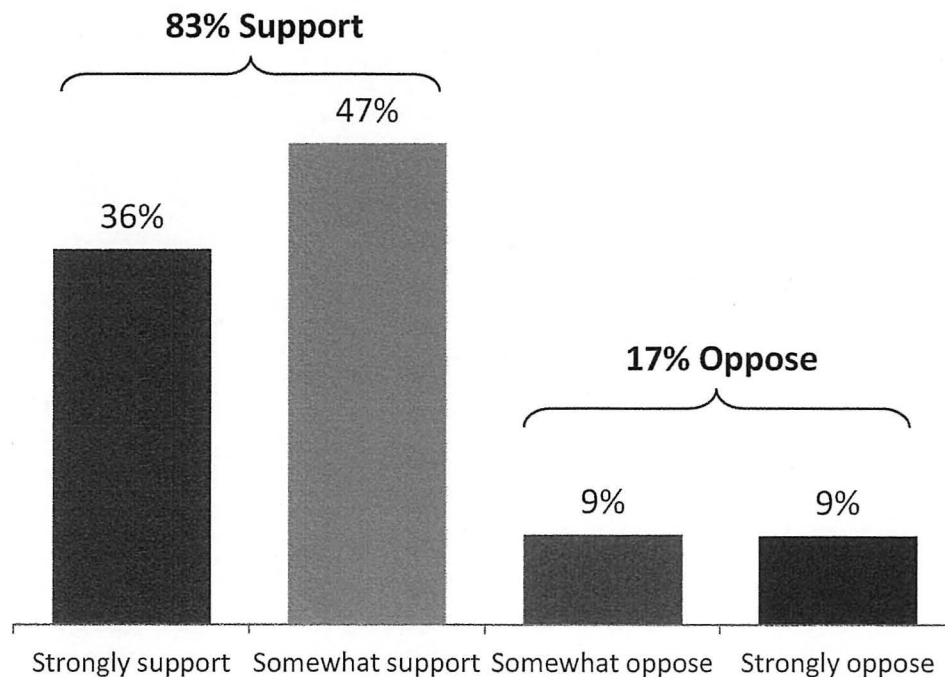


Decided Support for Refurbishment: Strong majority of “decided” support refurbishment

Q Many large power-generating plants in Ontario with various fuel sources will have to be replaced over the next 10 years or so because they are aging. In Ontario 80% of the plants will have to be replaced. In order to help meet Ontario future electricity demand, would you strongly support, somewhat support, somewhat oppose or strongly oppose upgrading and refurbishing existing nuclear power plants?

[all respondents except “don’t know”; n=531]

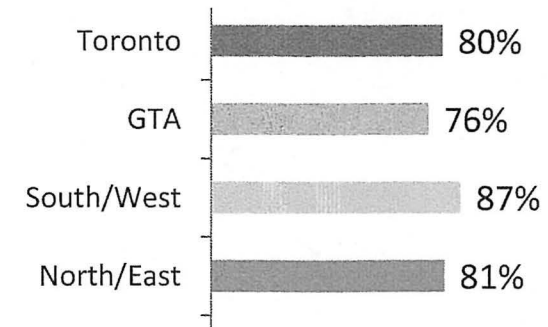
Anyone saying “Don’t know” has been removed from this analysis



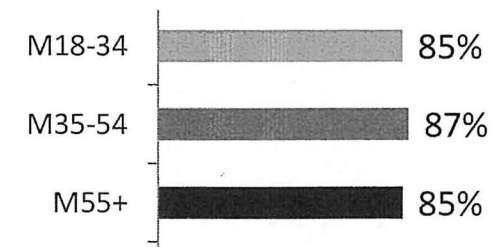
Sample Breakdown ►►

Those who say “support”

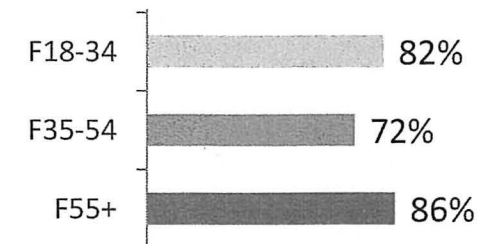
Region



Male/Age



Female/Age





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