

Public Opinion Research ►►
Ontario This Month

ENERGYCONFERENCE17

Toronto | September 25, 2017



Polling Sponsorship



The Ontario Energy Association (OEA) commissioned Innovative Research Group to be the Official Pollster at the OEA's ENERGYCONFERENCE17.

The following results belong to the OEA.

Methodology



Method:

Live operator telephone survey [60% landline, 40% mobile]

Sample Size: n=600

Sample Frame

General Population [18yrs+, Ontario resident, and eligible to vote]

Field Dates: September 11-18, 2017

Weighting

Sample weighted by *age*, *region*, and *gender* to reflect the actual demographic composition of the adult population residing in Ontario [Statscan Census 2011].

Confidence

Aggregated results are accurate to within $\pm 4\%$, 19 times out of 20.

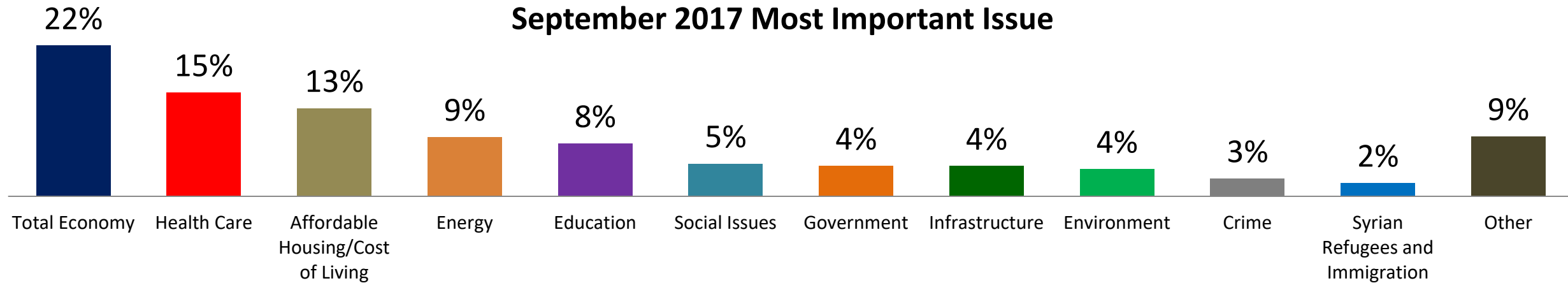


“The Politics of Energy”

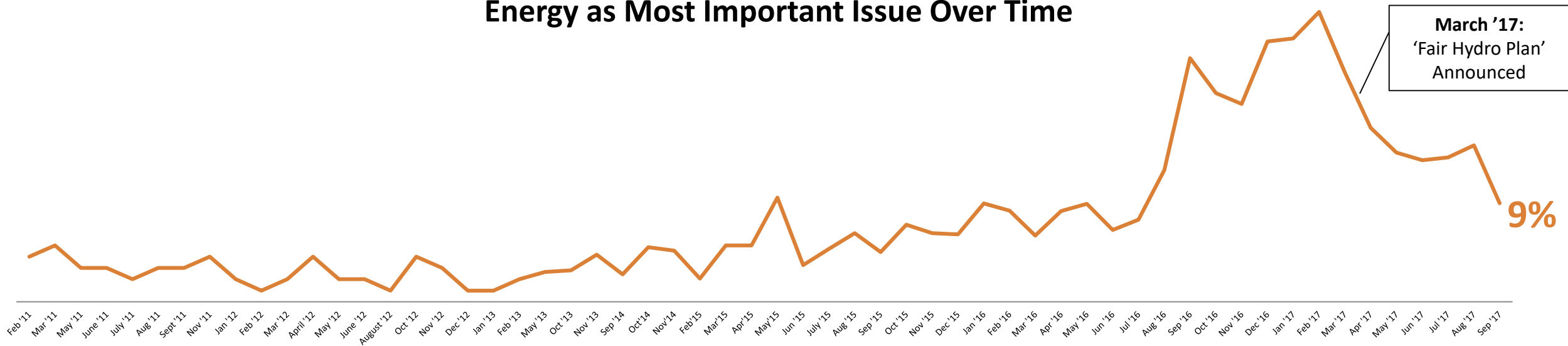
Most Important Issue: Since peaking in February 2017, Energy dramatically declining as most important issue for Ontarians

Q

What is the most important issue in Ontario today, in other words, the one that concerns you personally the most? [OPEN-ENDED] [n=600]



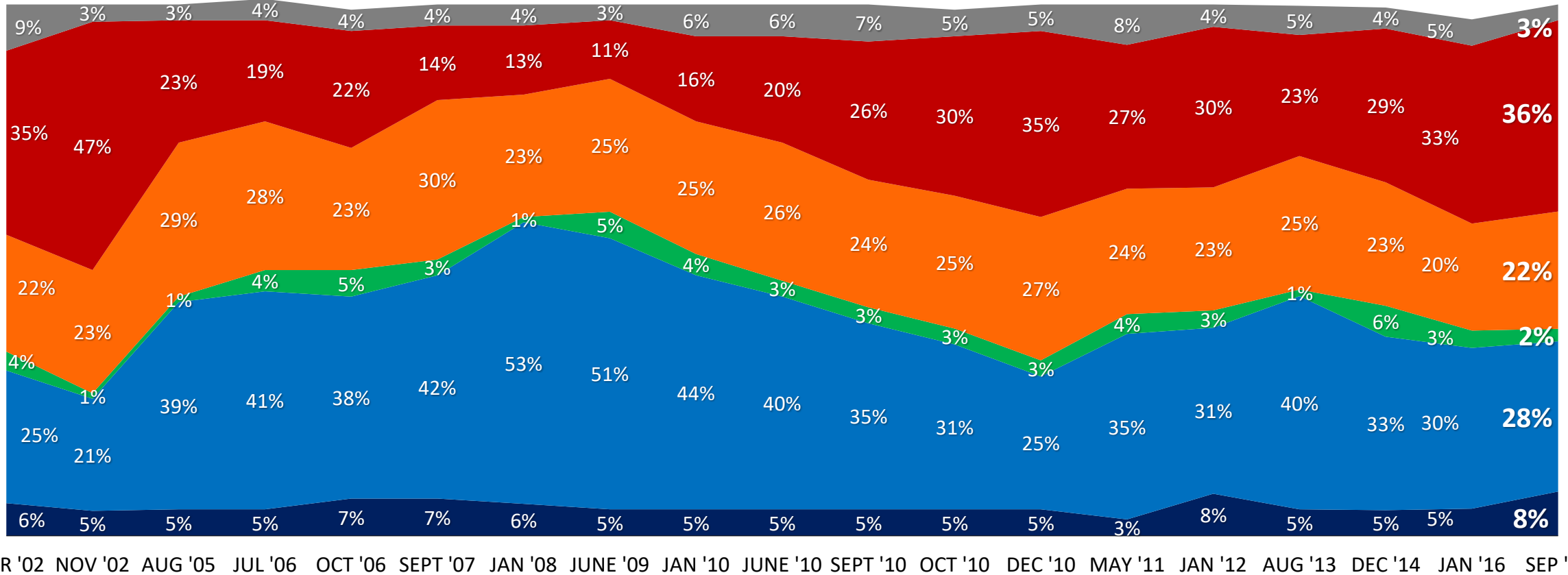
Energy as Most Important Issue Over Time



Electricity Satisfaction: majority (58%) of Ontarians dissatisfied with the electricity system, highest level of dissatisfaction since 2011



How satisfied or dissatisfied are you with the job the Ontario provincial government is doing to manage the electricity system? [n=600]

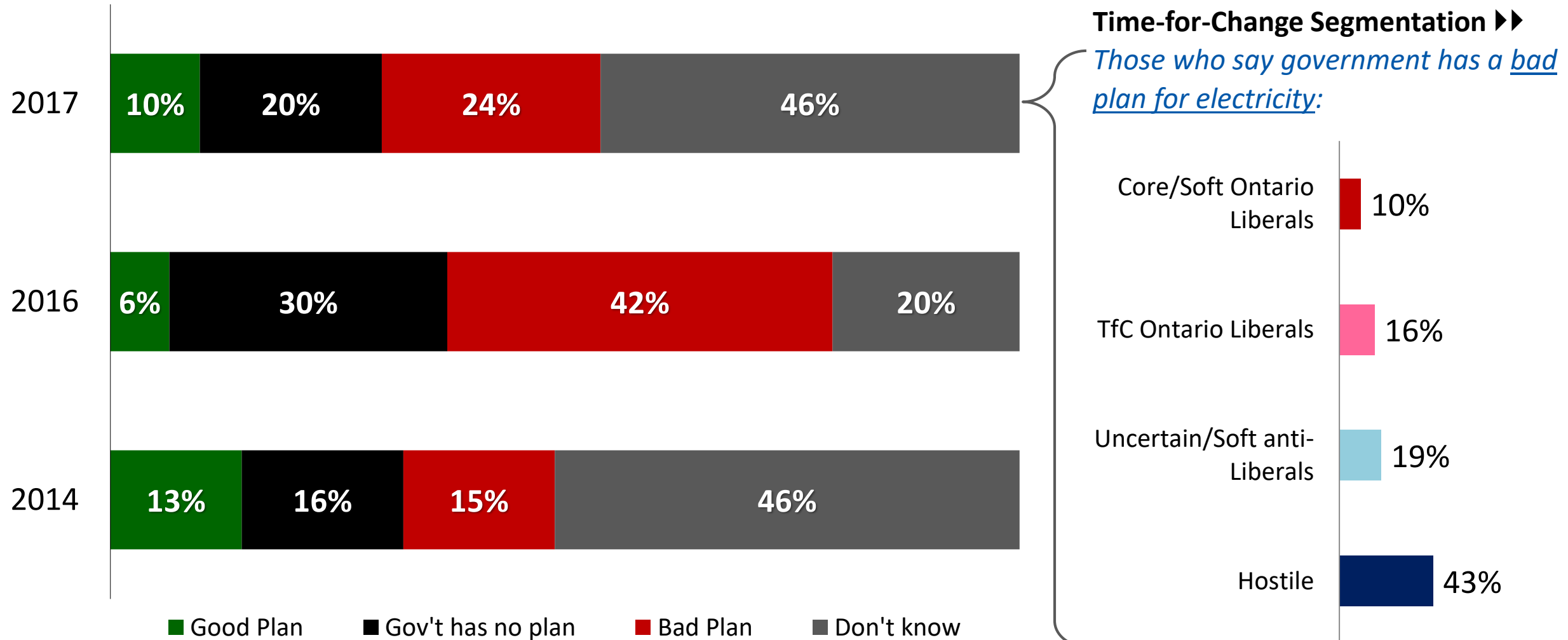


■ Very satisfied
 ■ Somewhat satisfied
 ■ Neither
 ■ Somewhat dissatisfied
 ■ Very dissatisfied
 ■ Don't know

Electricity Plan: attitudes towards plan on electricity have improved, still net negative; Tfc Liberals much less negative than anti-Lib groups



From what you have read, seen or heard, would you say the provincial government's plan for electricity is a good plan, a bad plan, do you not know enough to say, or would you say the government really does not have a plan? [n=600]



Priority by ID: nearly half of PC (44%) and 37% of NDP-identifiers now prioritize low rates; Liberal priority shifts from rates to environment



And which of these priorities for the energy system is the most important to you? [n=600]

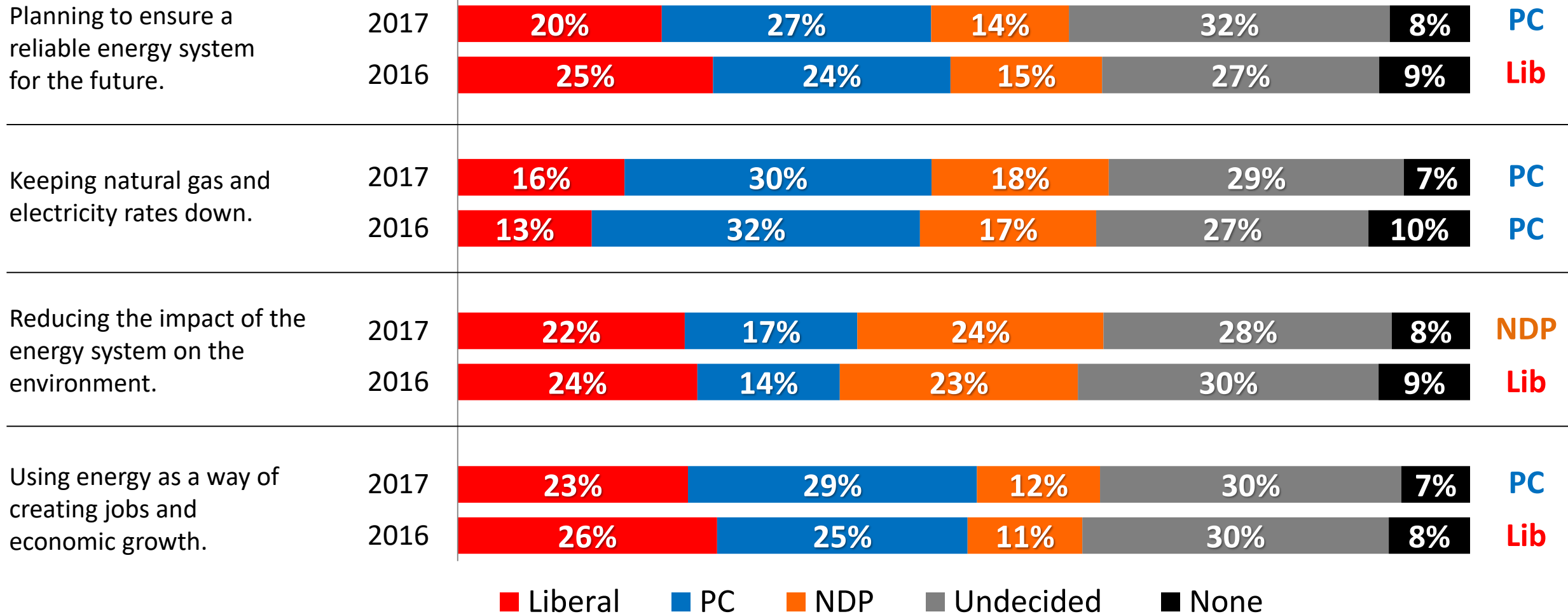
Most Important Priority by Party ID

% Most important priority	Provincial Wide		PC-		Liberal		NDP		Other		Unaligned	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Planning to ensure a reliable energy system for the future	17%	26%	20%	30%	18%	29%	9%	26%	14%	12%	16%	23%
Keeping natural gas and electricity rates down	40%	33%	51%	44%	31%	23%	48%	37%	21%	23%	36%	34%
Reducing the impact of the energy system on the environment	19%	24%	5%	11%	23%	34%	24%	24%	43%	44%	24%	21%
Using energy as a way of creating jobs and economic growth	21%	13%	22%	12%	27%	12%	18%	11%	13%	20%	17%	13%
Don't Know	2%	3%	1%	2%	2%	1%	1%	2%	5%	2%	5%	9%

Party best on Electricity: PCs now lead on 3 of 4 key electricity attitudes, worst on “reducing impact of energy system”

Q

Thinking about the three main political parties in Ontario – The Liberal Party, The Progressive Conservative Party, and The New Democratic Party – which party do you think is best when it comes to the following things? [n=600]



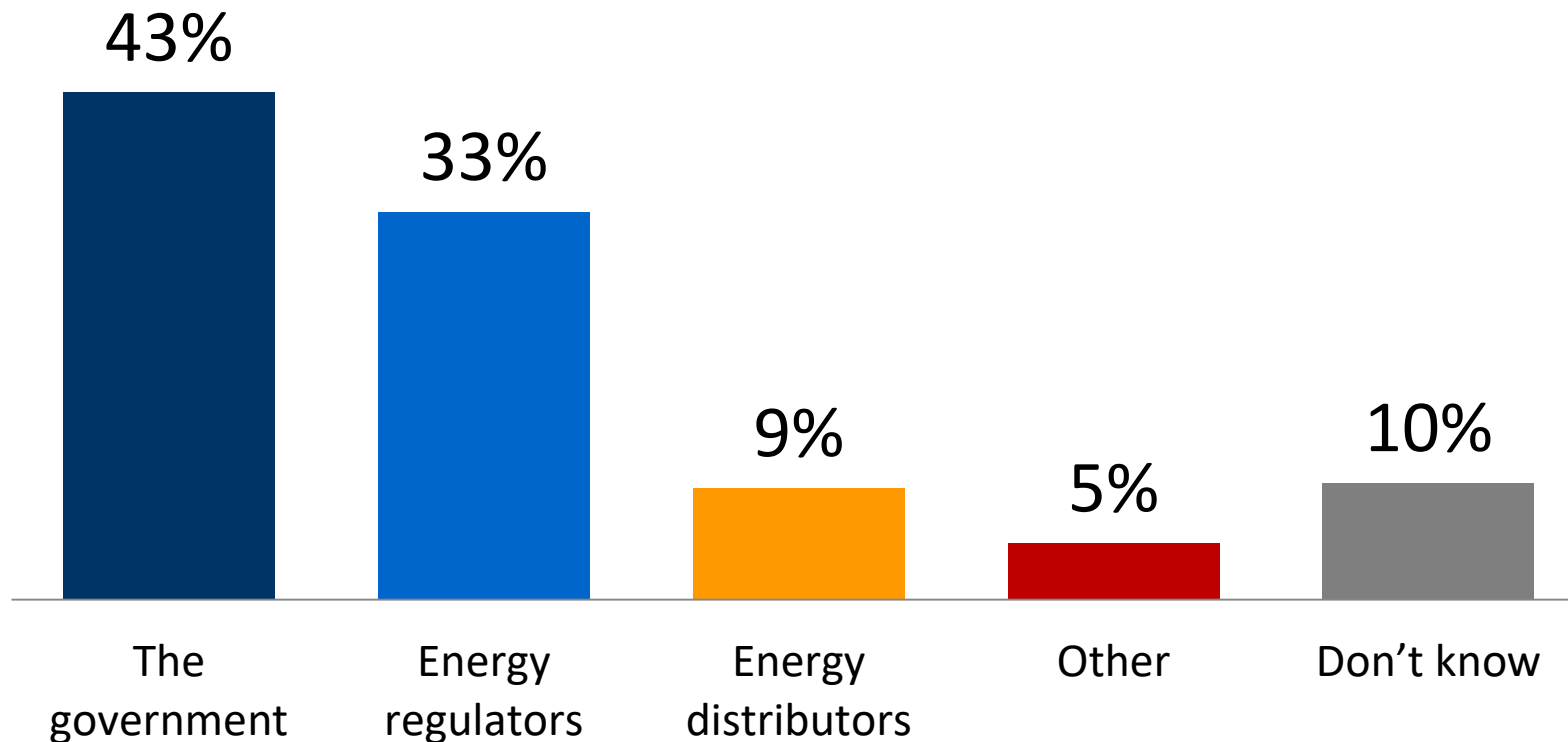
Energy Governance

**HYDRO PLAN
OUR BILL**

Electricity Stewardship: plurality (43%) think government should lead the way on electricity and natural gas; 6-in-10 (59%) TfC Liberals agree

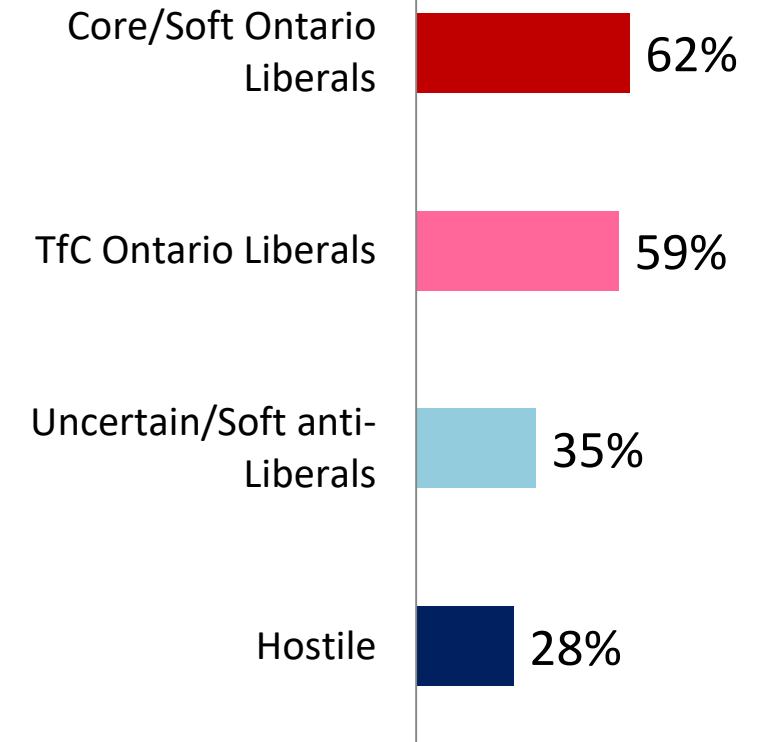


Who do you think should play the leading role in planning and managing the electricity and natural gas systems in Ontario? [n=600]



Time-for-Change Segmentation ►►

Those who think the government should play the leading role in energy system:





Ontario's Fair Hydro Plan

HYDRO PLAN
OUR BILL

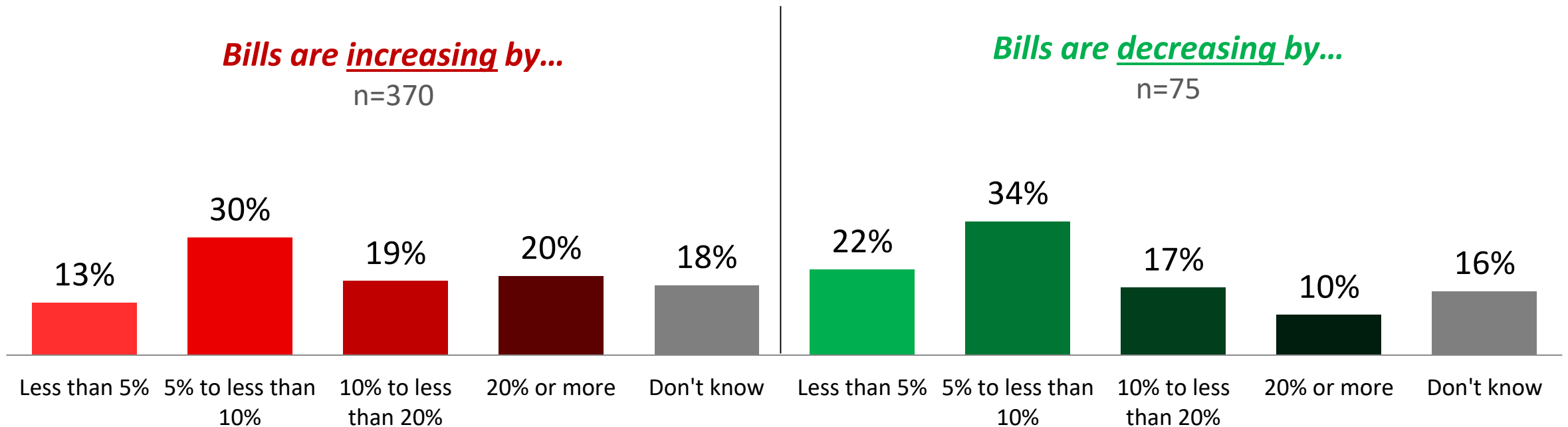
Bill Perception: majority (62%) think that their electricity bills are increasing; of those that do, 2-in-10 (20%) think it is by 20% or more



Are electricity bills in Ontario increasing, decreasing or staying the same? [n=600]



Thinking in terms of percentages, by what percent do you think Ontario electricity bills are [increasing/decreasing] on an annual basis?



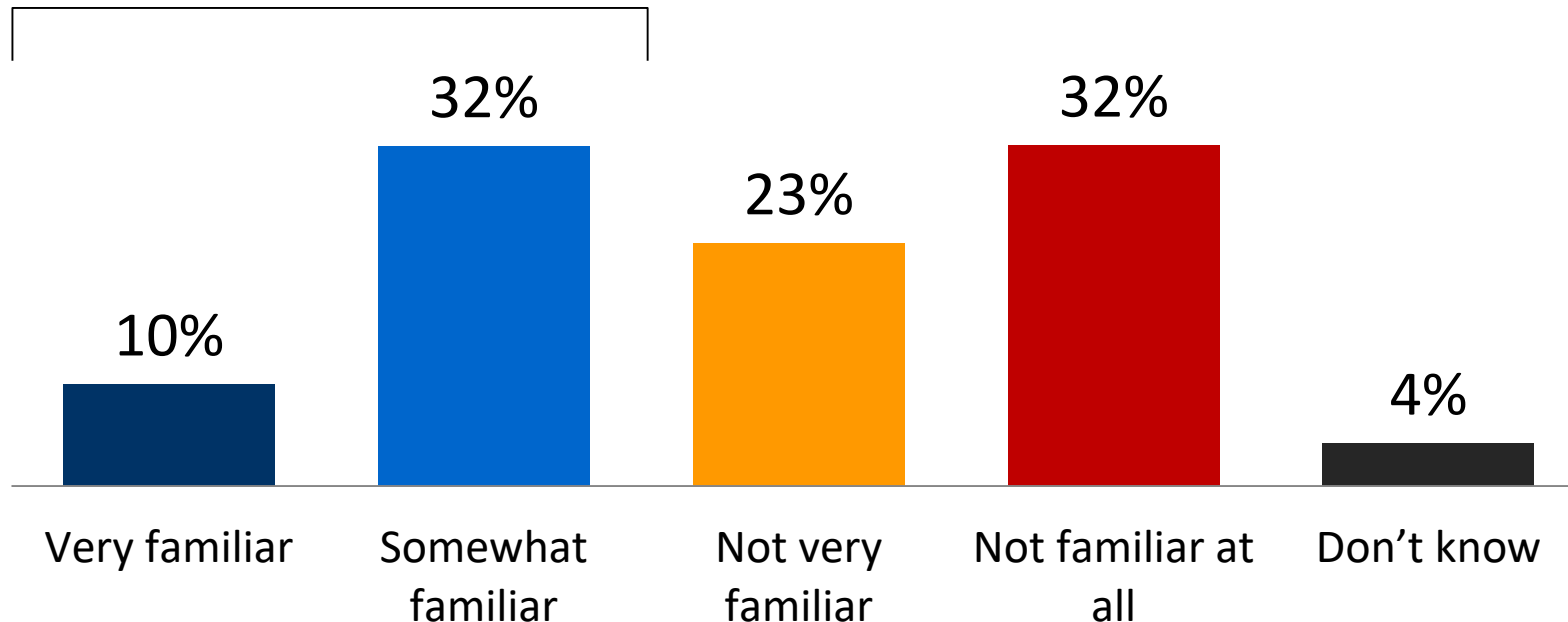
Fair Hydro familiarity: 4-in-10 (41%) say they are familiar with the *Fair Hydro Plan*, nearly 6-in-10 (59%) Hostile to Liberals are familiar



Recently the Ontario government introduced the Fair Hydro Plan to address electricity prices.
How familiar are you with this program? [n=600]

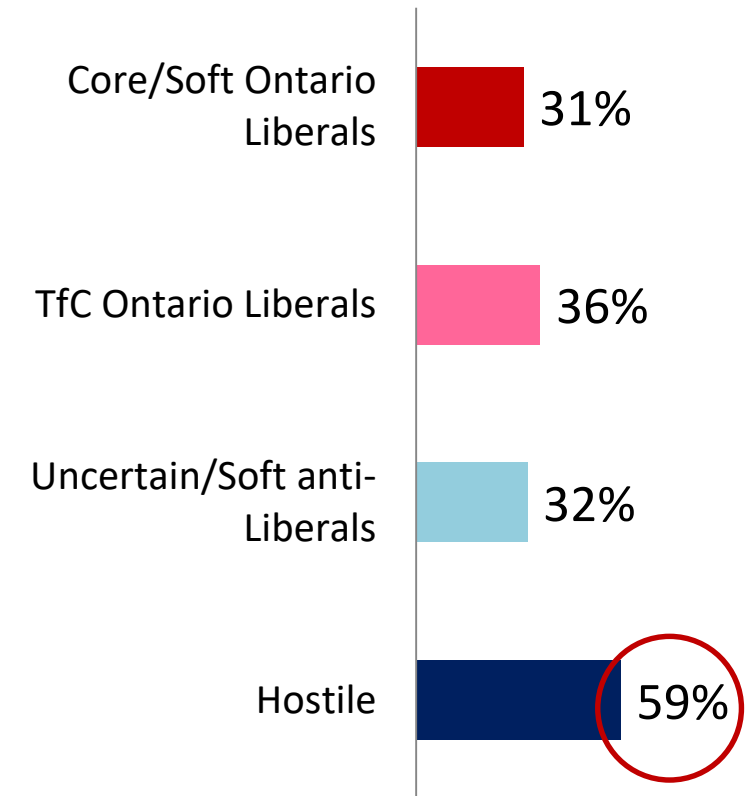
41%

are at least somewhat familiar
with the *Fair Hydro Plan*



Time-for-Change Segmentation ►►

Those who are at least somewhat familiar with the Fair Hydro Plan:



Plan by ID and TfC: among those who are familiar with the plan, only 4-¹⁵ in-10 of Liberals and 1-in-4 TfC Liberals think the plan is a “good thing”

 From what you have read, seen or heard or from your first impression, does the Fair Hydro Plan sound like a good thing or a bad thing or do you not know enough to say? [Asked only of those who are familiar with the *Fair Hydro Plan*, n=248]

Perception of Plan by Provincial Party ID and Time-For-Change Segmentation

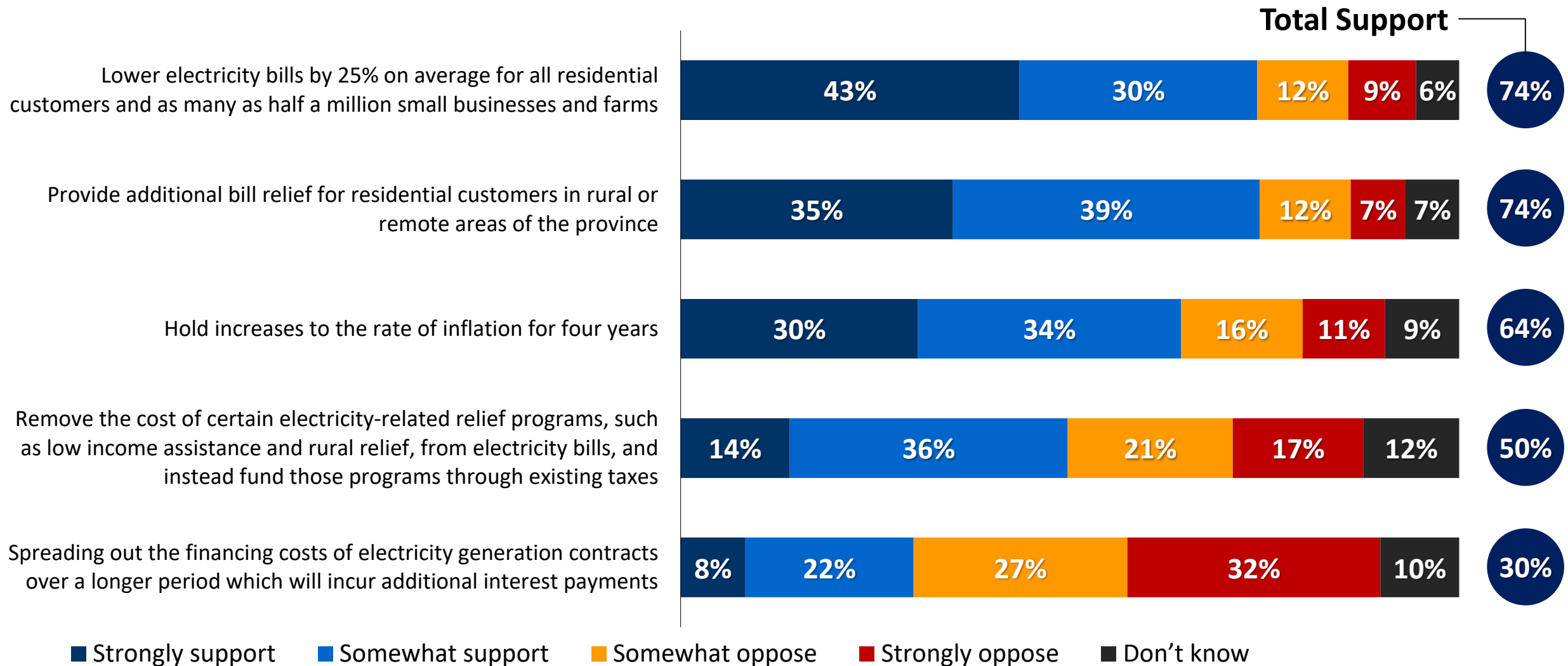
% Perception of Plan	Province Wide	Party ID					Time-For-Change Segmentation			
		PC	Liberal	NDP	Other*	Unaligned	Core/Soft Liberal	Time for a change Liberal	Uncertain/Soft Anti-Liberal	Hostile
Good Thing	19%	6%	39%	16%	2%	24%	47%	27%	13%	9%
Bad Thing	46%	69%	25%	48%	32%	42%	19%	24%	32%	71%
Don't know enough to say/Don't know	34%	24%	36%	32%	66%	34%	35%	49%	55%	18%

* Due to small n-size, results should be treated with caution.

FHP Initiatives: highest support for bill relief (74%), 25% bill reduction (74%) and rate increases indexed to inflation (64%)

Q

The Fair Hydro Plan which came into effect on June 1, 2017 laid out a number of initiatives to address electricity prices. Please indicate if you *strongly support, somewhat support, somewhat oppose or strongly oppose* each of the following initiatives. [n=600]



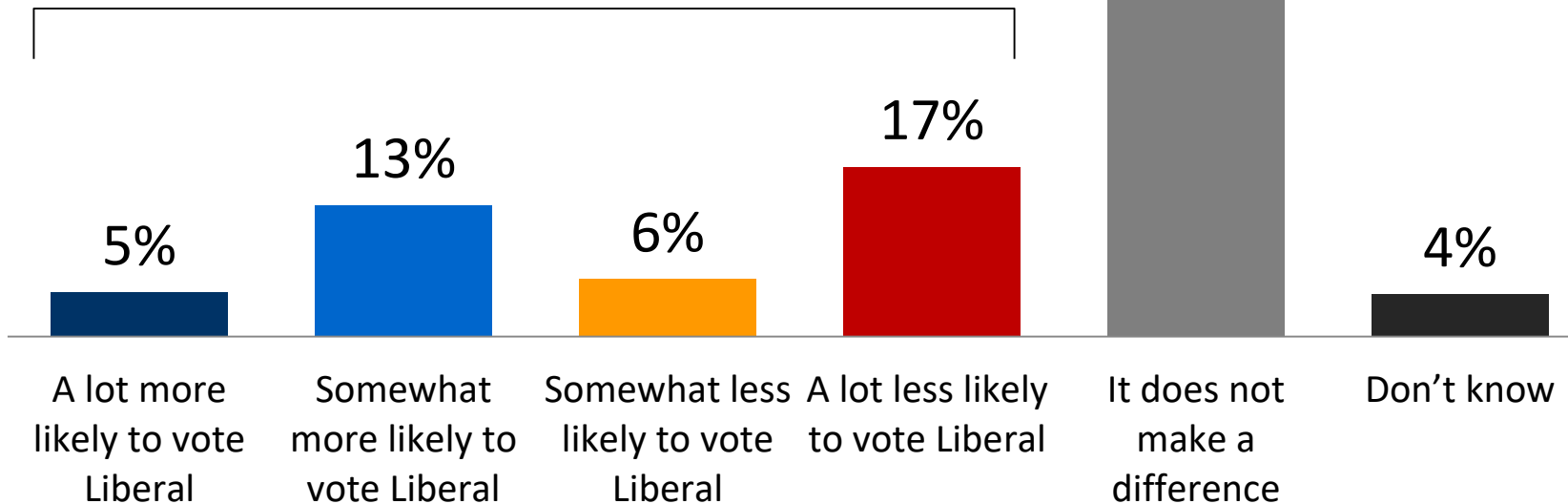
FHP Effect on Vote: for majority (54%), the plan makes no difference on voting Liberal; TfC Liberals more likely to vote Liberal after hearing details

Q

Do the details of the Fair Hydro Plan leave you feeling a lot more likely to vote Liberal, somewhat more likely, somewhat less likely, a lot less likely to vote Liberal or does it not make a difference?
[n=600]

-5%

Net perceived impact on Liberal vote after hearing about the details of the *Fair Hydro Plan*



Time-for-Change Segmentation ►►

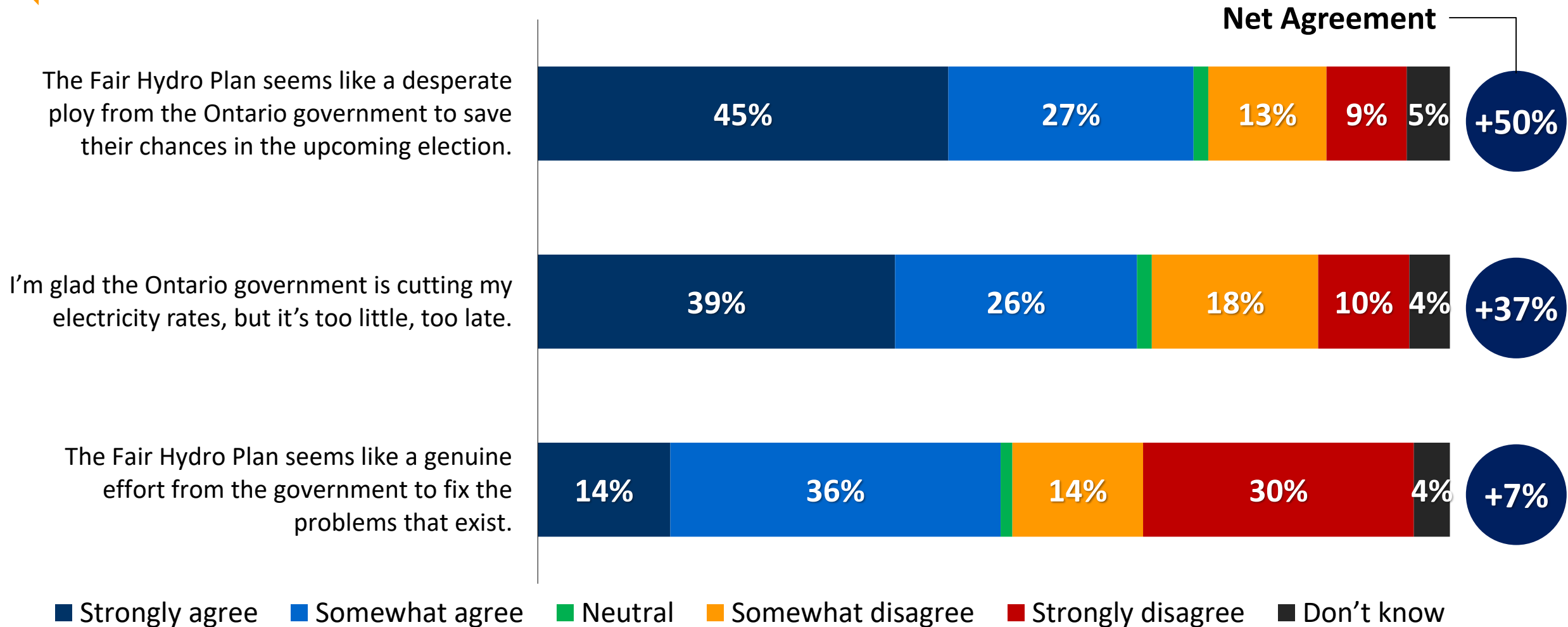
Net likelihood to vote Liberal after hearing details of Fair Hydro Plan

Time-for-Change Segmentation	Net Likelihood to Vote Liberal
Core/Soft Ontario Liberals	+34%
TfC Ontario Liberals	+18%
Uncertain/Soft Anti-Liberals	-7%
Hostile	-44%

Plan Attitudes: despite strong agreement with skeptical statements, 50% say *Fair Hydro Plan* is a genuine effort from the government



I am going to read you a series of statements. For each, please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree.
[n=600]

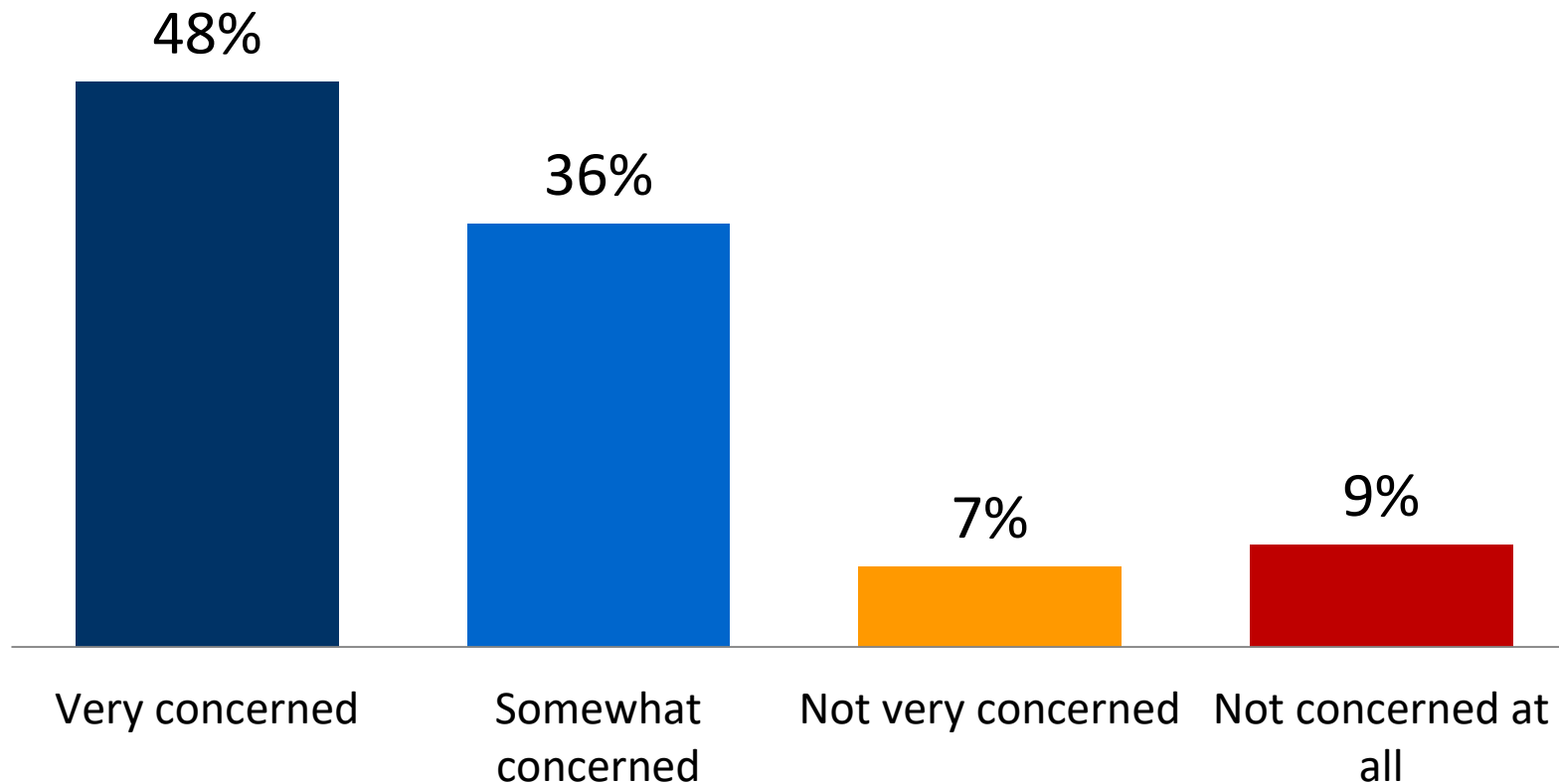


Cap-and-Trade

Climate Change concern: more than 8-in-10 (84%) concerned about climate change, nearly half (48%) “very concerned”

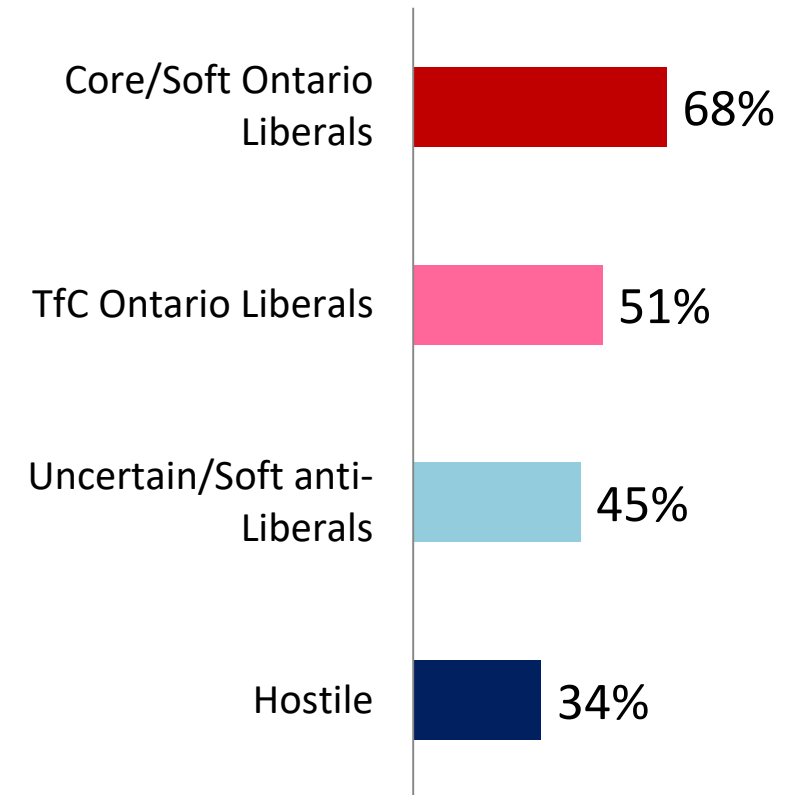


How concerned are you about climate change? [n=600]



Time-for-Change Segmentation ►►

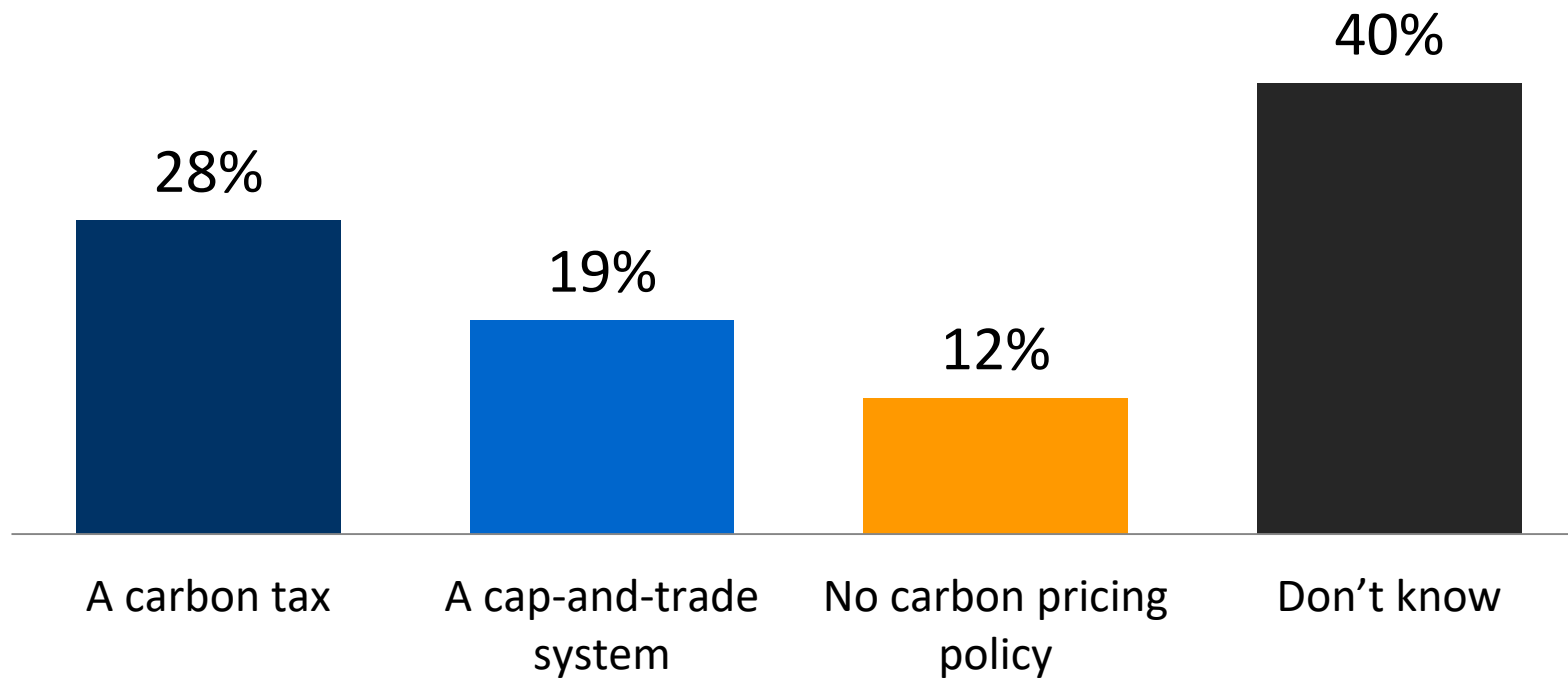
Those who are very concerned with climate change:



Carbon policy: only 19% identify current Ontario policy correctly as cap-and-trade; hostile most likely to identify the correct system

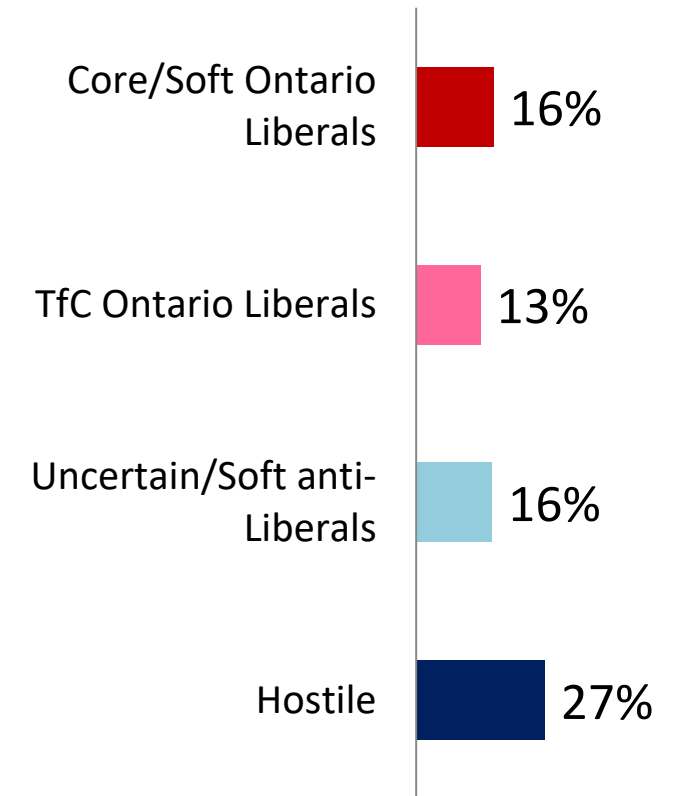
Q

As you may know, a carbon price is a cost applied to carbon pollution to encourage polluters to reduce the amount of greenhouse gas they emit into the atmosphere. Some examples include a carbon tax or a cap-and-trade system. To the best of your knowledge, does Ontario have a carbon pricing policy? And would that be... [n=600]



Time-for-Change Segmentation ►►

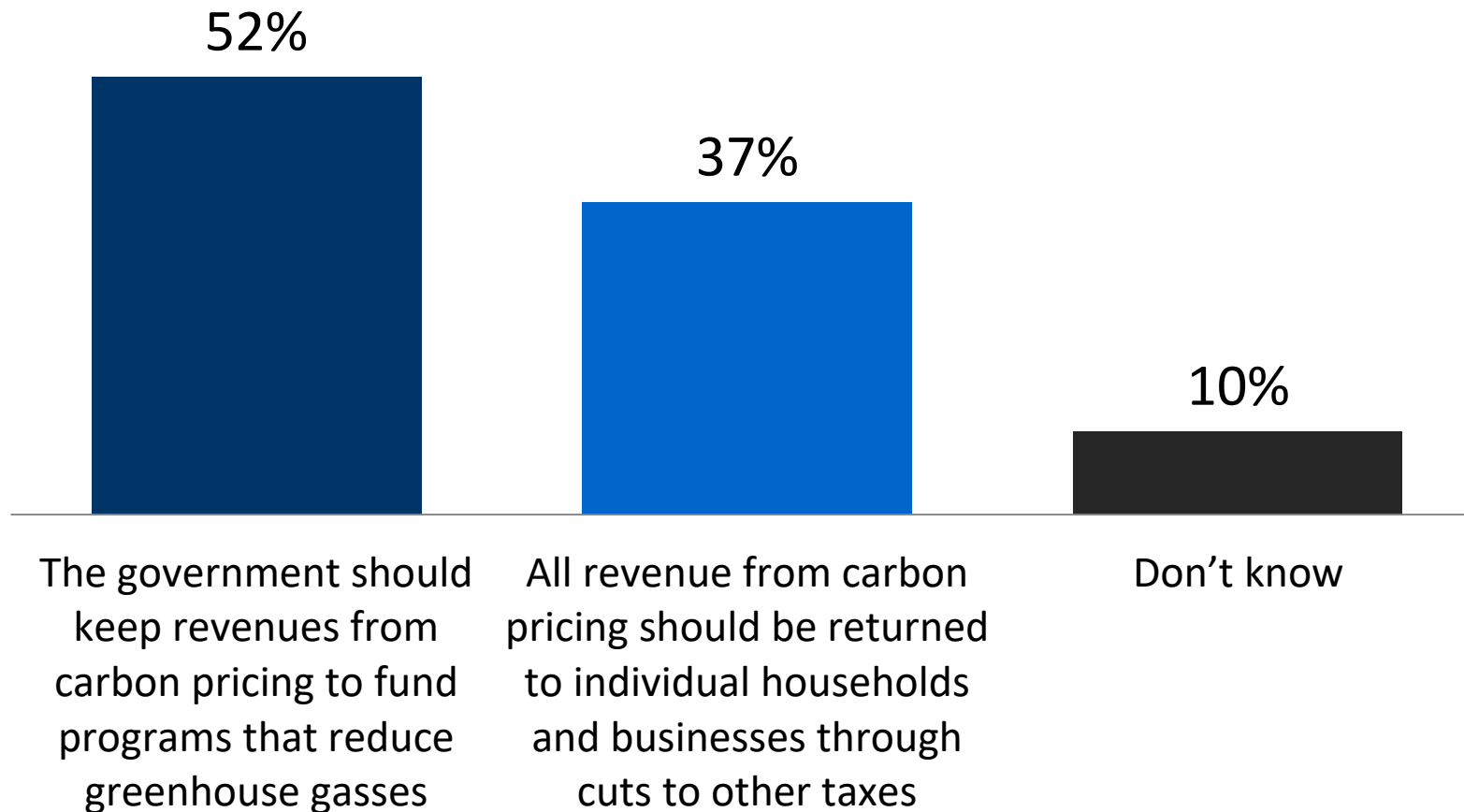
Those who say "cap-and-trade":



Carbon Pricing Revenues: majority (52%) think government should keep the revenues from carbon pricing to help reduce greenhouse

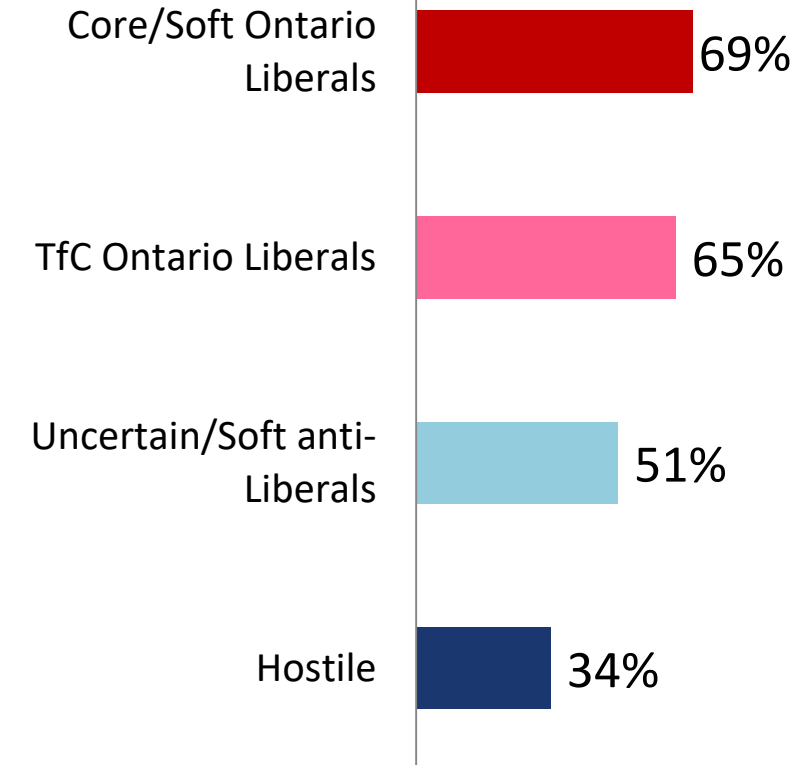


Which of the following is closest to your point of view about carbon pricing? [n=600]



Time-for-Change Segmentation ►►

Those who say "govt should keep revenues":



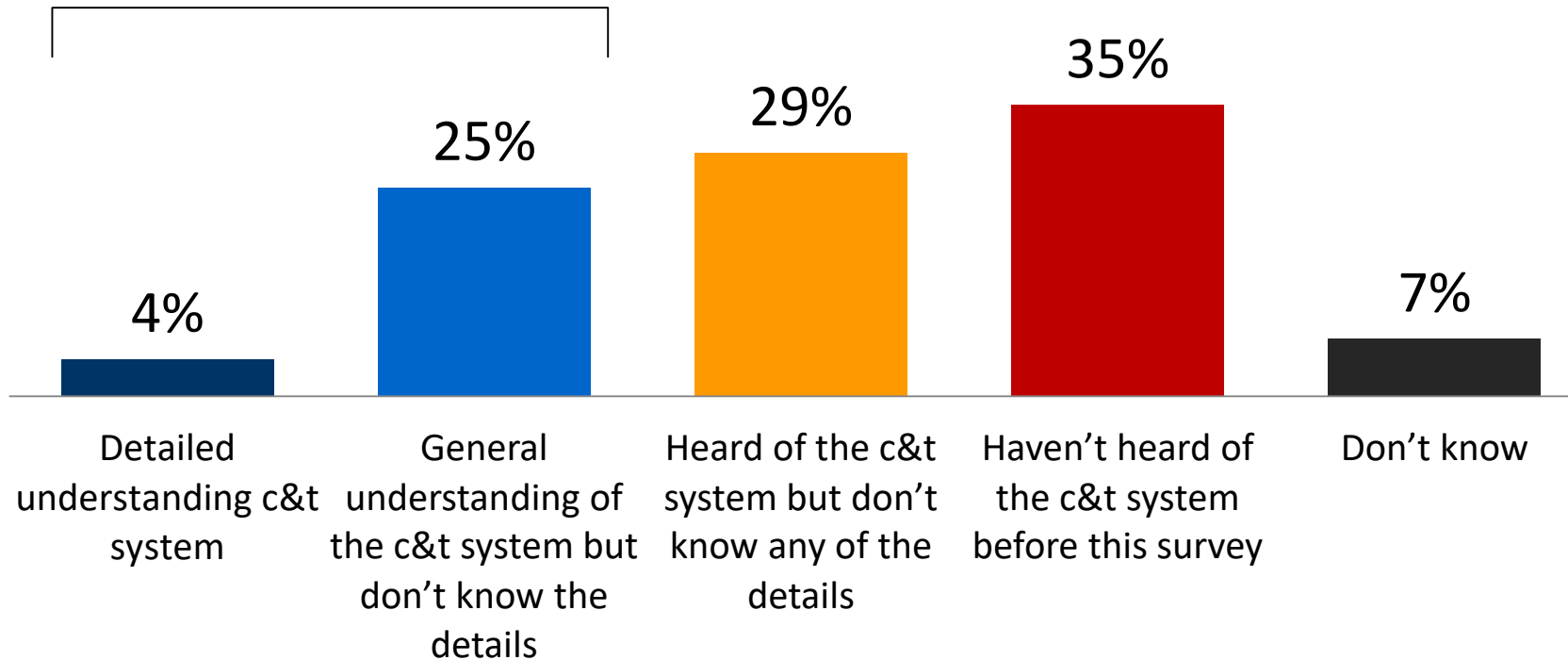
Cap-and-trade familiarity: 3-in-10 (29%) are familiar with the concept; Tfc Liberals (18%) are the least familiar



In fact, on January 1st 2017, the Ontario provincial government moved ahead with a cap-and-trade carbon pricing system. How familiar are you with the concept of a cap-and-trade system? [n=600]

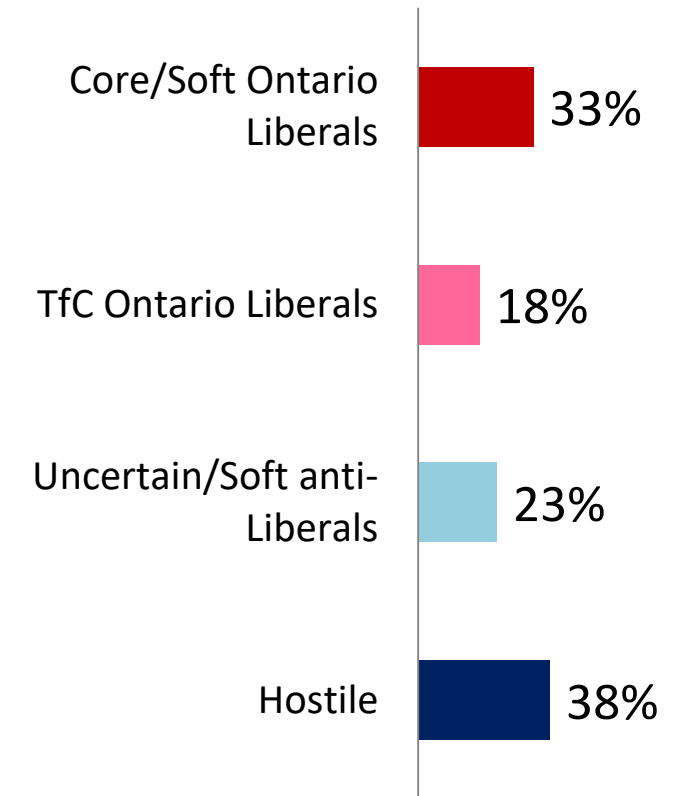
29%

Have at least a general understanding of cap-and-trade



Time-for-Change Segmentation ►►

Those who have at least a general understanding of cap-and-trade:



Cap-and-trade support: 3-in-4 (73%) support the general idea of cap-and-trade, hostile (60%) least supportive group

Q

As you may know, cap-and-trade is an approach to controlling greenhouse gas emissions.

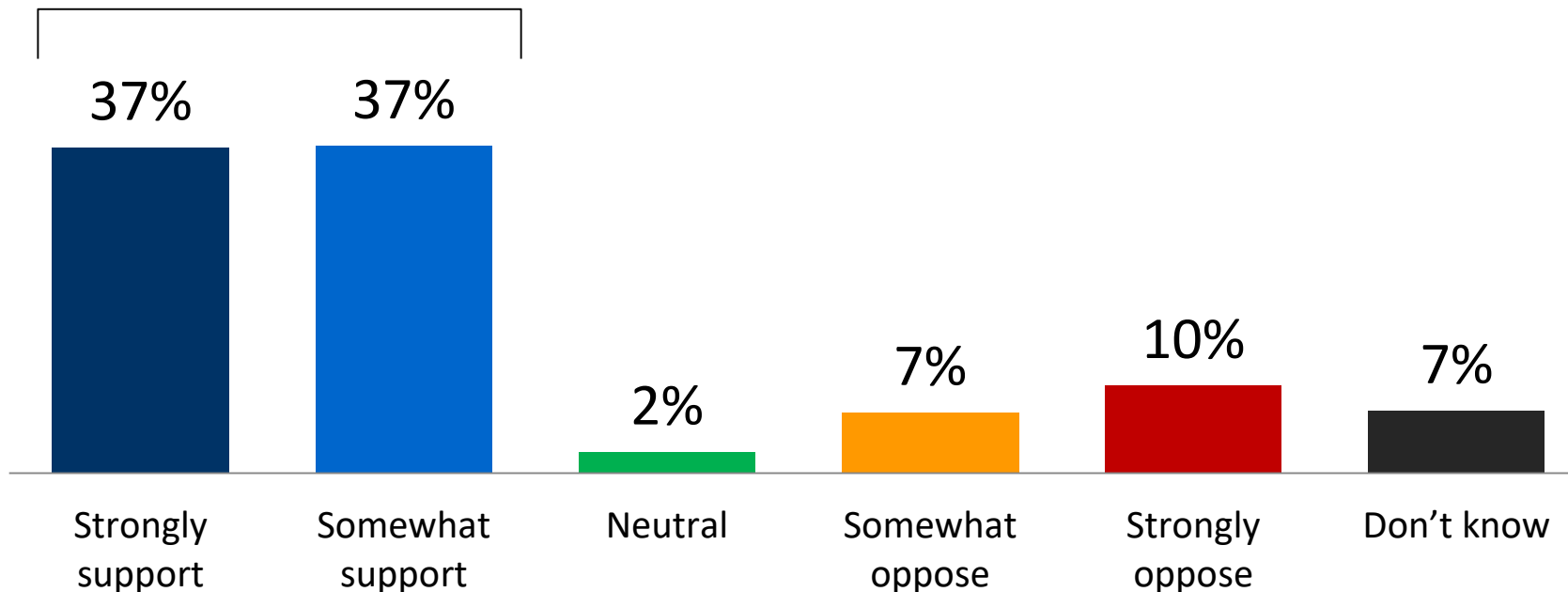
The “*cap*” sets a limit on emissions, which is lowered over time to reduce the amount of emissions released into the atmosphere.

The “*trade*” creates a market for emissions, which requires companies to pay for their emissions and thus motivates companies to meet or come under their allotted limit – the less they emit, the less they pay, so there is a financial incentive to reduce emissions.

Do you support or oppose this general idea? [n=600]

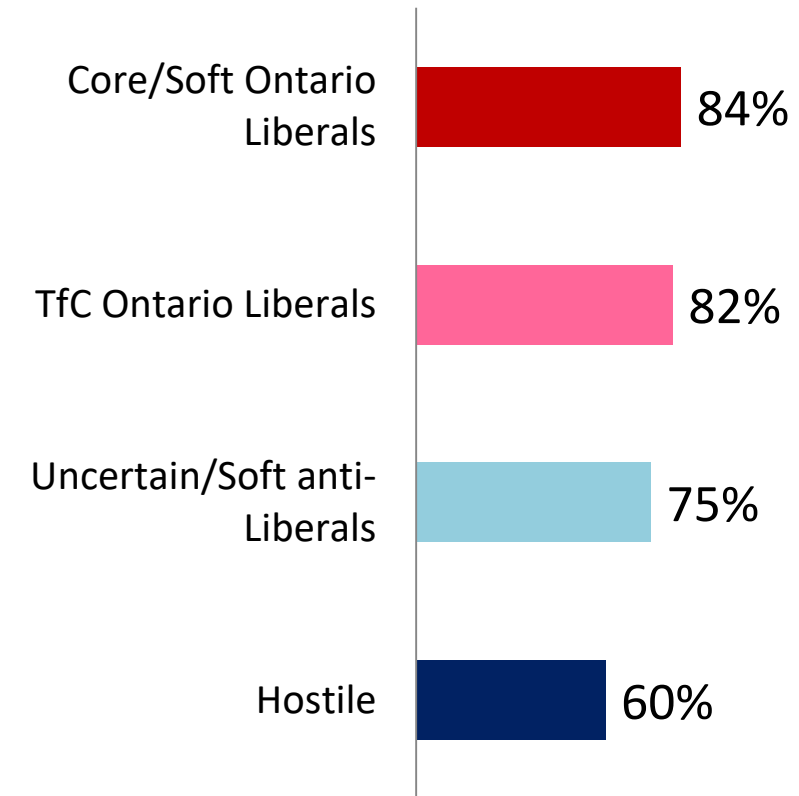
73%

Support the general
idea of cap-and-trade



Time-for-Change Segmentation ►►

Those who support cap-and-trade:



Impact on Finances: 2-in-10 (21%) feel a “significant, noticeable” impact on their household expenses since cap-and-trade implemented



Since the implementation of cap-and-trade in Ontario on January 1st, have you noticed an impact on any household expenses, including your natural gas bill, groceries or gasoline for your vehicle? [n=600]

43%

Have noticed an impact on their household expenses

21%

Significant, noticeable impact on my household expenses

21%

Noticeable but minor impact on my household expenses

49%

I haven't noticed any impact on my household expenses due to cap-and-trade

9%

Don't know

Time-for-Change Segmentation ►►

Those who have noticed a significant, noticeable impact on their expenses:

Core/Soft Ontario Liberals 10%

TfC Ontario Liberals 27%

Uncertain/Soft anti-Liberals 15%

Hostile 31%

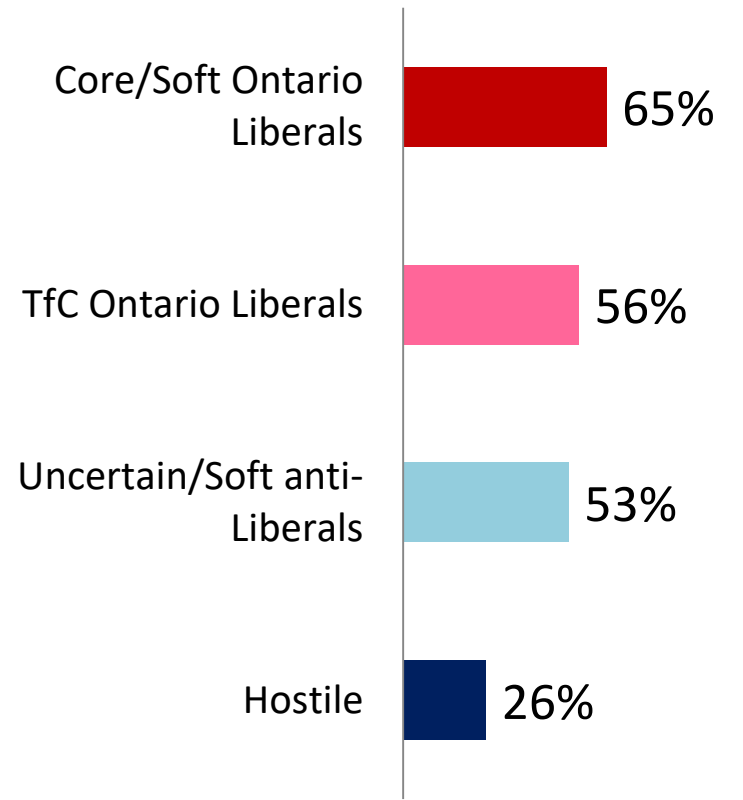
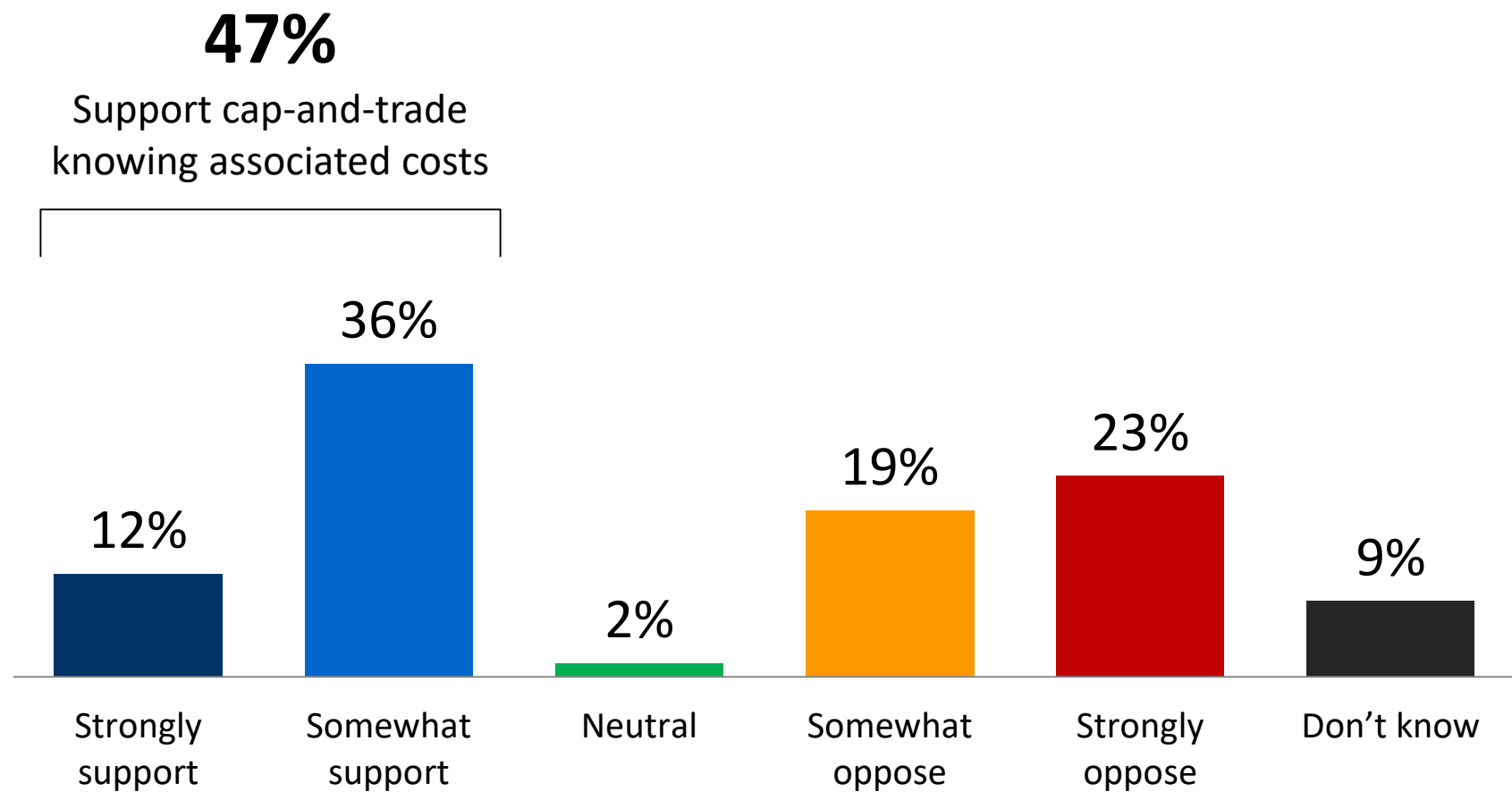
Aided Support: after learning of costs, more support (47%) than oppose (42%) cap-and-trade; majority of TfC Liberals (56%) support it



It is estimated that in 2017 the costs associated with “Cap and Trade” for the average Ontario household will be approximately \$250. Knowing the associated costs for your household, do you support or oppose the Ontario government’s “Cap and Trade” program? [n=600]

Time-for-Change Segmentation ▶▶

Those who support cap-and-trade



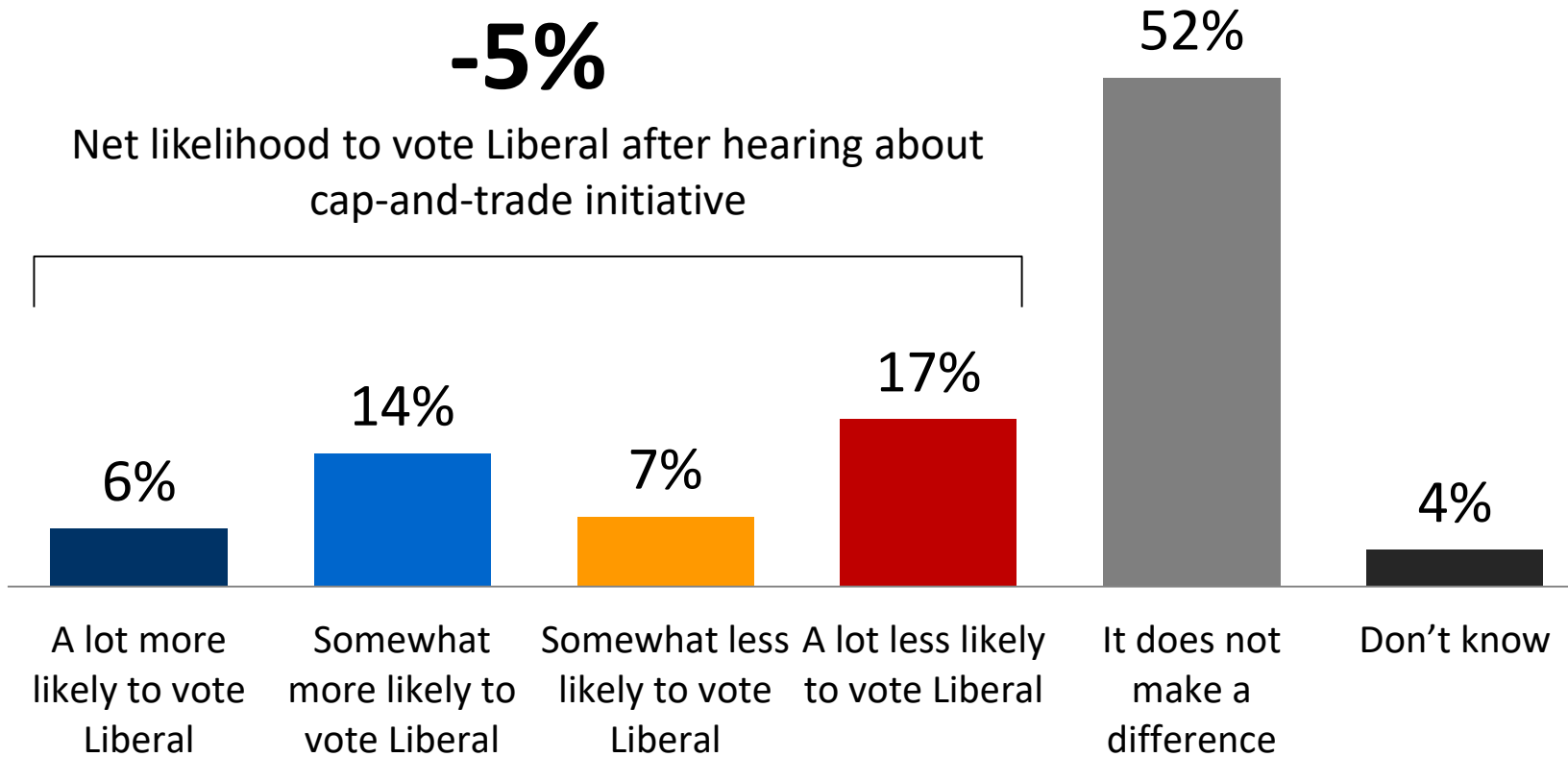
Change in Support: for majority (52%), C&T initiative makes no difference on vote; TfC Liberals (+19%) now more likely to vote Liberal



After hearing about this initiative from the provincial Liberal government, does it leave you feeling a lot more likely to vote Liberal, somewhat more likely, somewhat less likely, a lot less likely to vote Liberal or does it not make a difference? [n=600]

-5%

Net likelihood to vote Liberal after hearing about cap-and-trade initiative



Time-for-Change Segmentation ►►

Net likelihood to vote Liberal because of cap-and-trade initiative

Time-for-Change Segmentation	Net Likelihood to Vote Liberal
Core/Soft Ontario Liberals	+41%
TfC Ontario Liberals	+19%
Uncertain/Soft Anti-Liberals	-5%
Hostile	-49%



Conservation Programs

Cancellation of conservation programs: 3-in-10 (31%) think programs should be cancelled, majority of PC (55%) identifiers

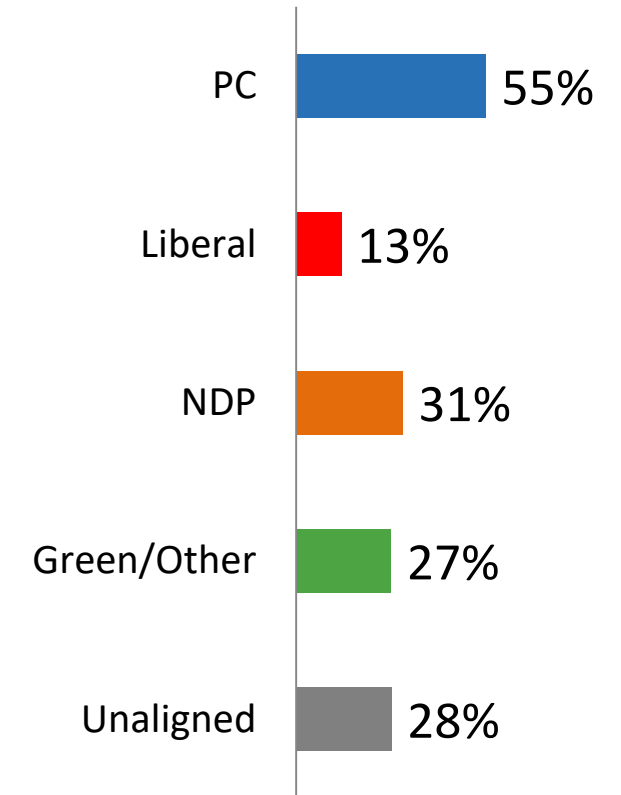
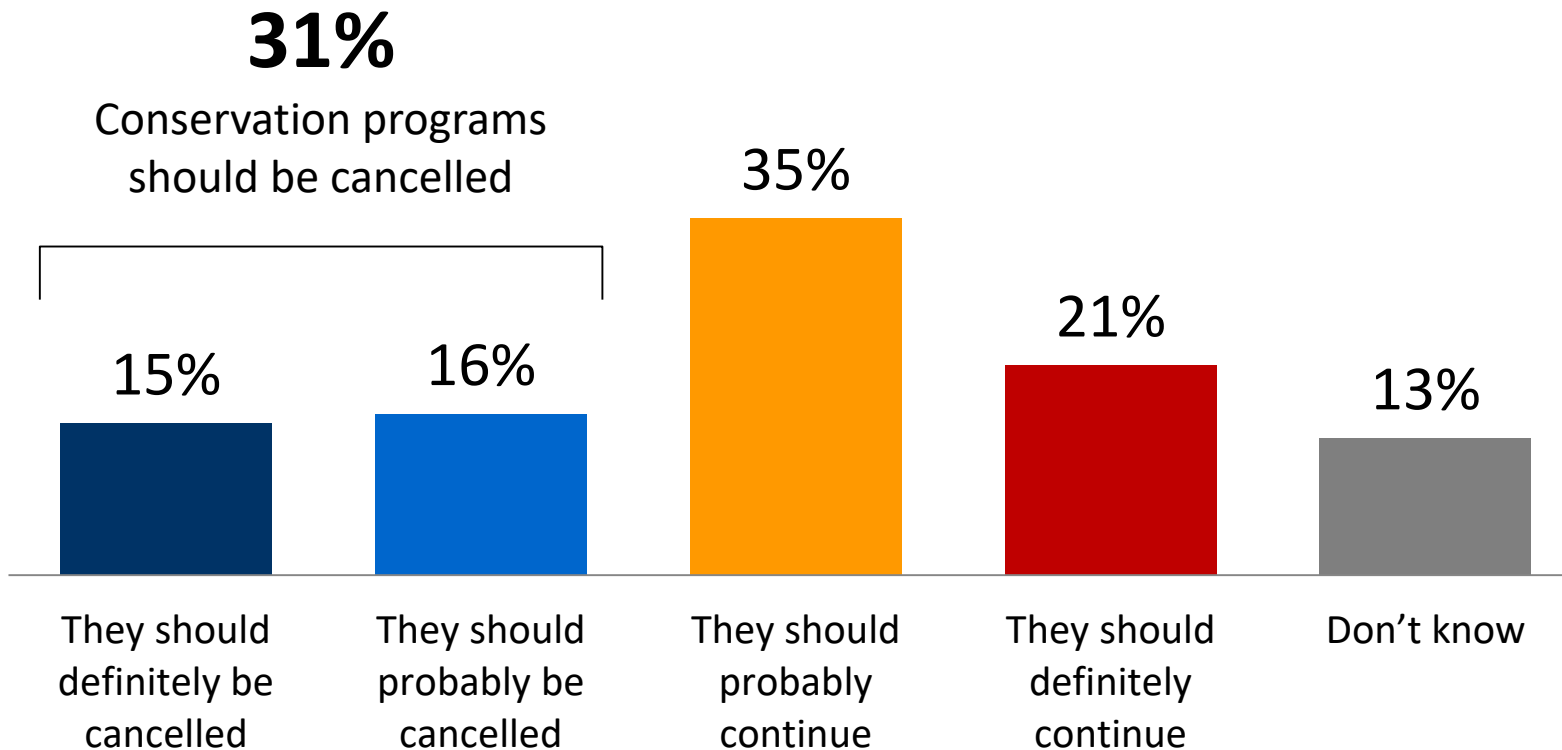


It is estimated that until approximately 2024, Ontario will be generating more electricity than is consumed by households and businesses. Over that period, the typical household will be paying approximately \$35 per year to fund programs to help conserve electricity.

In your opinion, how do you think Ontario should proceed with these programs? [n=600]

Ontario Provincial Identification ▶▶

Those who say conservation programs should be cancelled:



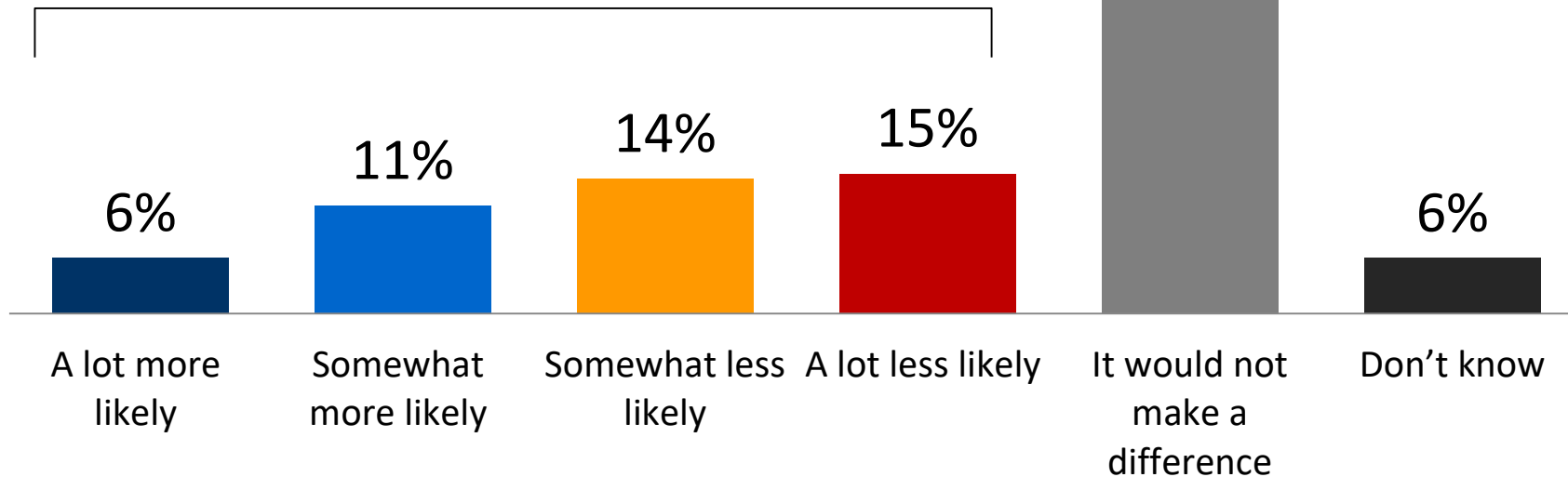
Cancellation effect: cancellation would make no difference for nearly half (47%); Tfc Liberals (-10%) would be less likely to choose that party



If a provincial political party were to propose ending these conservation programs, would that leave you a lot more likely, somewhat more likely, somewhat less likely or a lot less likely to vote for that party or does it not make a difference? [n=600]

-12%

Net likelihood to vote for a provincial political party that proposed ending conservation programs



Time-for-Change Segmentation ►►

Net likelihood of voting for a party that would end conservation programs

Time-for-Change Segmentation	Net Likelihood to Vote for Party
Core/Soft Ontario Liberals	-25%
TfC Ontario Liberals	-10%
Uncertain/Soft Anti-Liberals	-19%
Hostile	+2%

Energy not just a challenge for Liberals

1.

Electricity is declining as a top of mind issue and fewer believe the government has a bad plan

2.

Still problems for Liberals with high levels of dissatisfaction and most people believing their bills are still increasing.

3.

Despite their anger at the Liberals, Ontarians still look to government for leadership

4.

Ontarians willing to pay more for cap and trade and prefer the revenue be used for abatement rather than tax relief.

5.

PCs lead on reducing prices, reliability and using energy to create jobs, but NDP and Liberals ahead on environment



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