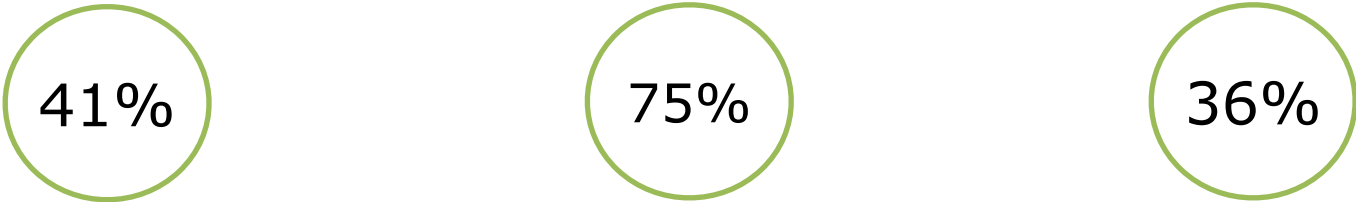

Energy Literacy Survey 2017

Next Steps

January 2018

Survey Findings

- In 2017 the Strategic Counsel surveyed 1053 residents across Ontario to track consumer views and behaviours related to the energy system and the Ontario government's management of the system.
- Their findings were compared to those from 2016, as this was the fourth in a series of tracking surveys conducted over the past eight years by the Ministry of Energy.
- The results concluded that although awareness and satisfaction levels are low amongst Ontario energy consumers, overall numbers are either holding or improving in relation to 2016.



41%

are satisfied with affordability
(in comparison to 24% in 2016)

75%

are satisfied with supply
(in comparison to 73% in 2016)

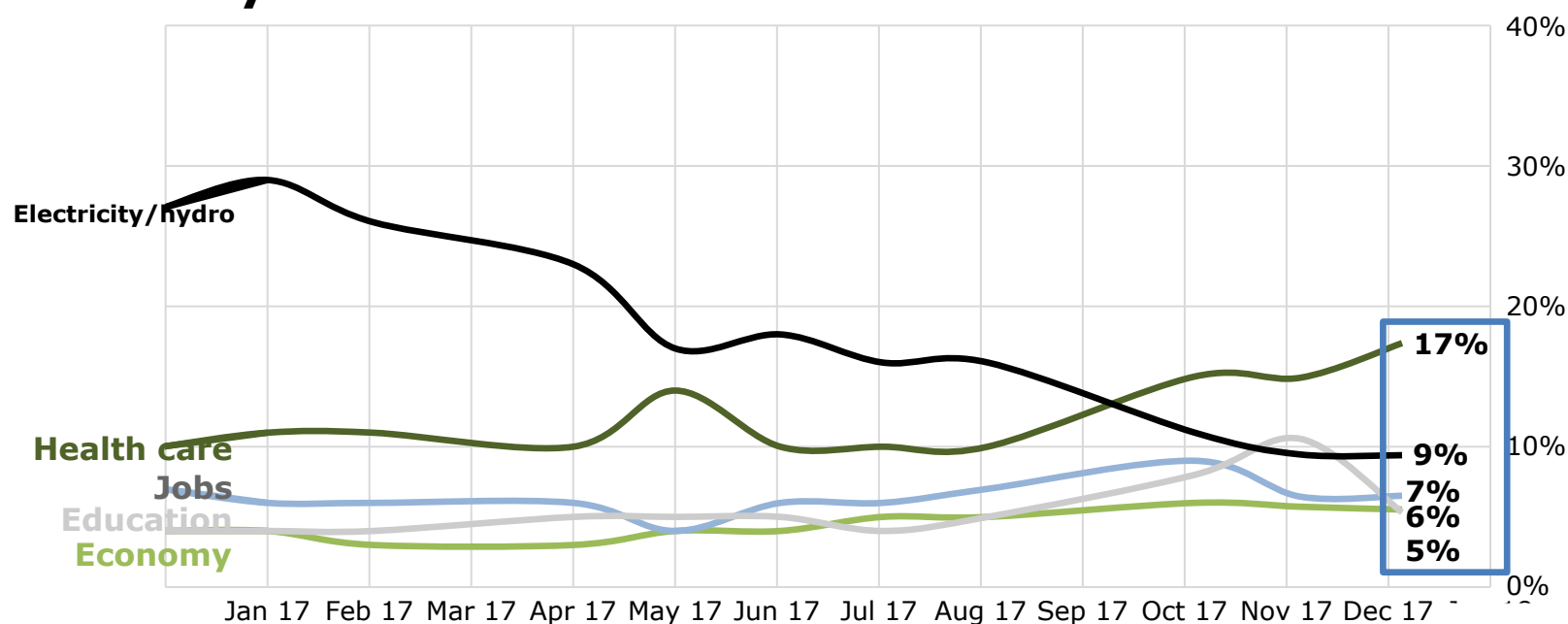
36%

are satisfied with transparency
(in comparison to 29% in 2016)

Context – Omnibus Research

- Electricity prices have fallen steadily as a top-of-mind issue of importance (Environics, December 2017).

Past-year trend

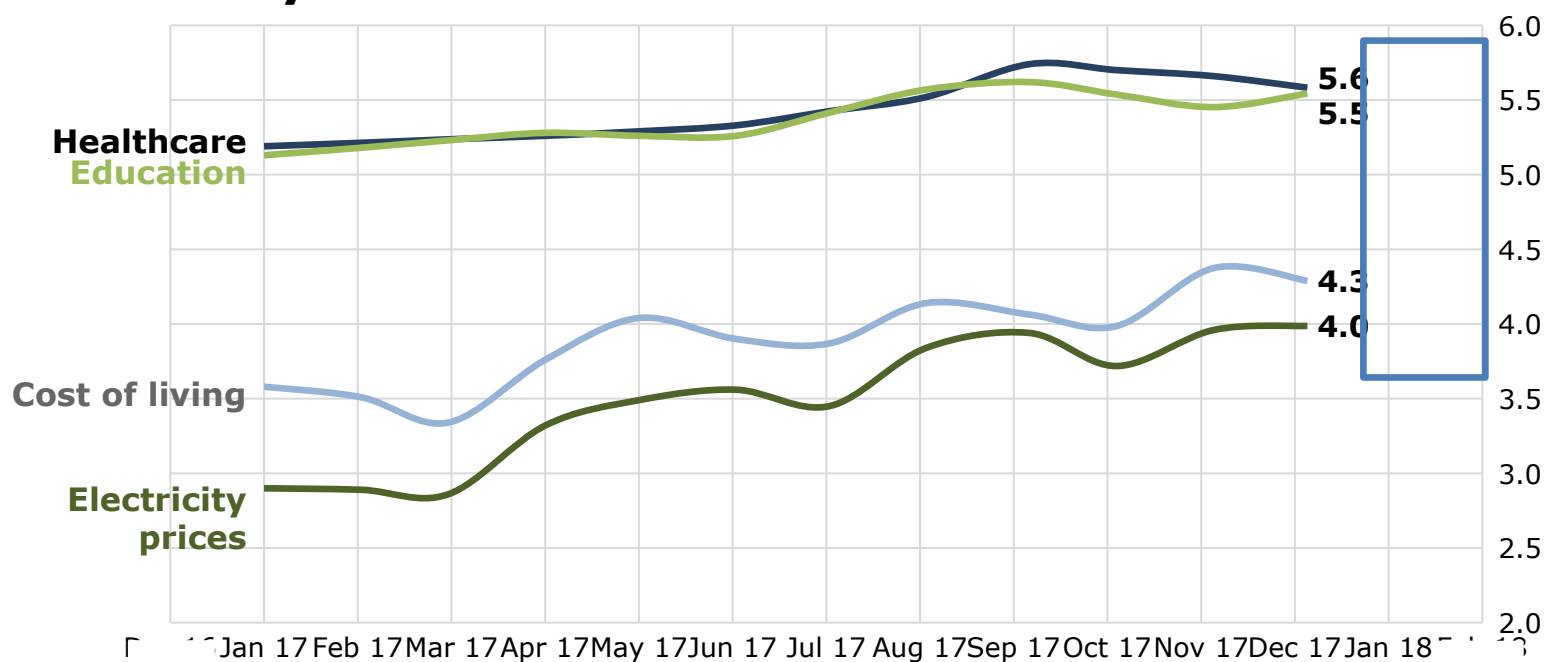


Q1. Thinking about the issues presently facing Ontario, which ONE do you feel should receive the GREATEST attention from the Ontario provincial government? That is, what should be the top priority?

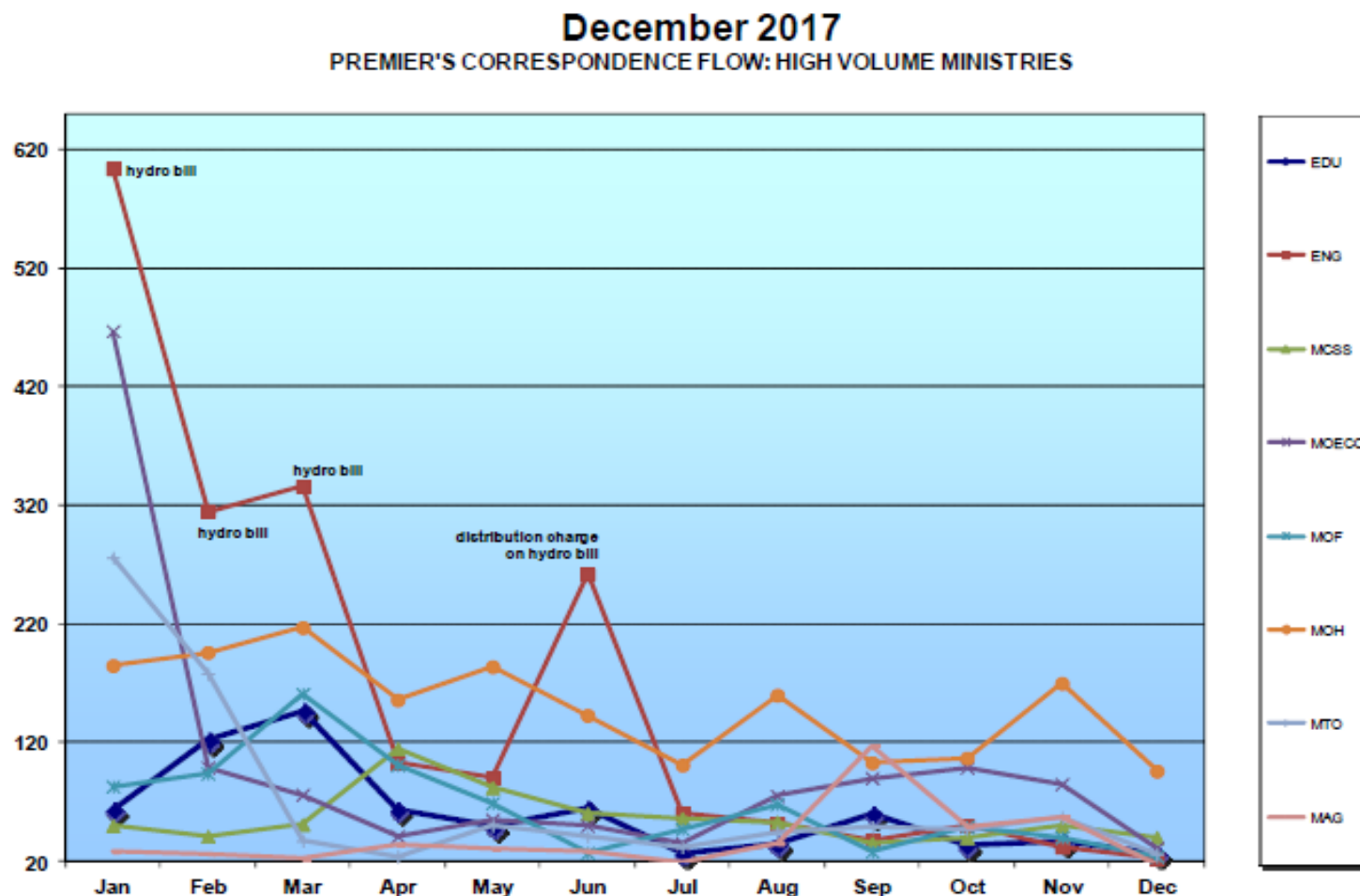
Context – Omnibus Research

- Government performance in managing electricity prices is improving (Environics, December 2017)

Past-year trend



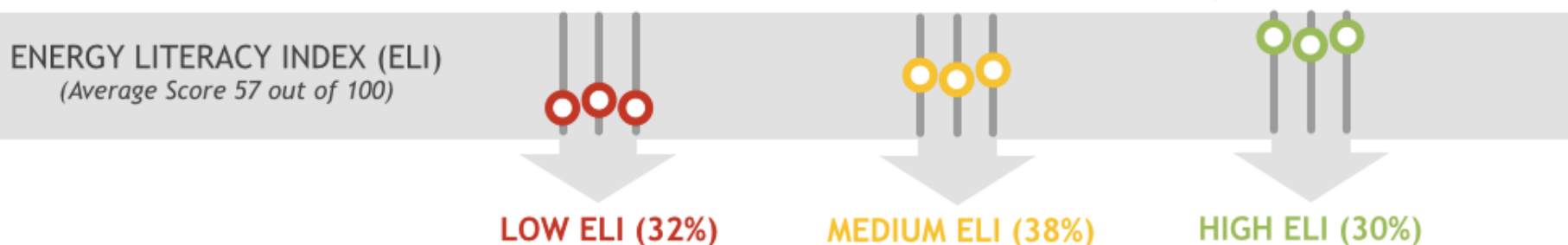
Context – Hydro bills in public correspondence



- In 2017, we saw a dramatic decline in correspondence from the public

Survey Findings – Awareness vs Satisfaction

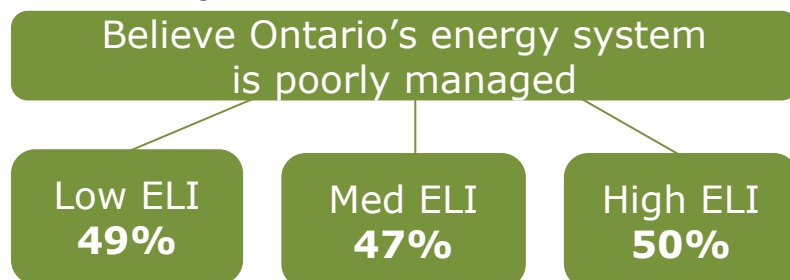
- The Energy Literacy Index (ELI) measured and categorized Ontario energy consumers based on their self-assessed levels of the following:
 - Engagement in energy issues, understanding of the energy system, involvement in conservation actions, and interest in their electricity use
- Higher the ELI the more engaged and knowledgeable the consumer was in terms of the energy sector and their electricity consumption
- **However, “Higher ELI scores do not translate into more positive views of Ontario Government’s management of the energy system”**



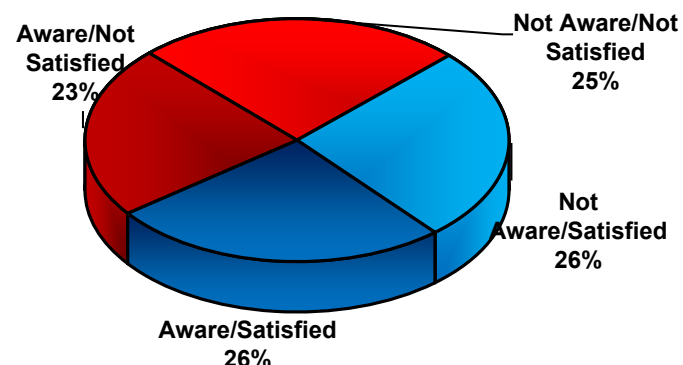
Interpreting the Results

- **There is little to no correlation between awareness of the energy system and satisfaction with the Ontario Government's management of it.** Increased awareness of the energy system will not improve the public mood or impression of the Ontario energy sector and ministry.
- Broad conservation marketing and system education are useful and important, but may not be able to achieve more.
 - IESO conservation marketing has averaged \$6M per year, supplemented by LDC efforts; there is not evidence that boosting this would have an impact on public opinion

The Strategic Counsel, 2017



Reference point: Pollara, 2012



Public Support

- The Strategic Counsel survey found the four highest ranking options for controlling electricity costs amongst the public:
 - Giving a tax break to people who renovate their homes to make them more energy-efficient
 - Developing new conservation programs for people so they can use less electricity
 - Changing time-of-use pricing to reward those who use electricity at off-peak times
 - Offering new pricing options that are different from the current time-of-use models
- All have one thing in common: **consumer choice**.
- This suggests a consumer expectation of value from their participation in conservation initiatives and involvement in energy management.

Next Steps

- Based on these findings, the ministry has options on public engagement.
 - Positives: Public frustration has abated, faith in management of the system has edged upward
 - Negatives: Since paid marketing stopped, awareness of FHP has fallen
 - Public polling has, for years, continually shown that people believe “I’m already doing a lot” and “I want to do more” to manage their electricity
 - New OCC partnership creates an opportunity for local education

Option 1

Focus on continued communication of Ontario’s Fair Hydro Plan, primarily through coordinated local efforts, which could include: earned media, local events, local media availability, small business events (through OCC), MPP echoes

Option 2

Conduct further research as to whether ratepayers respond to the idea of ‘consumer choice’. Options could be developed to explore quick wins at community level, which could potentially ramp up into a larger campaign later.