

Public Opinion Research ▶▶
Ontario This Month:
Energy

Ontario Landscape

*Field Dates: September 15th to
September 24th, 2016*

Sample Size: n=600; MoE ±4.0%

Methodology

Telephone Survey



=

60% Landline



+

40% Mobile



Method: Live operator telephone survey [60% landline and 40% mobile]

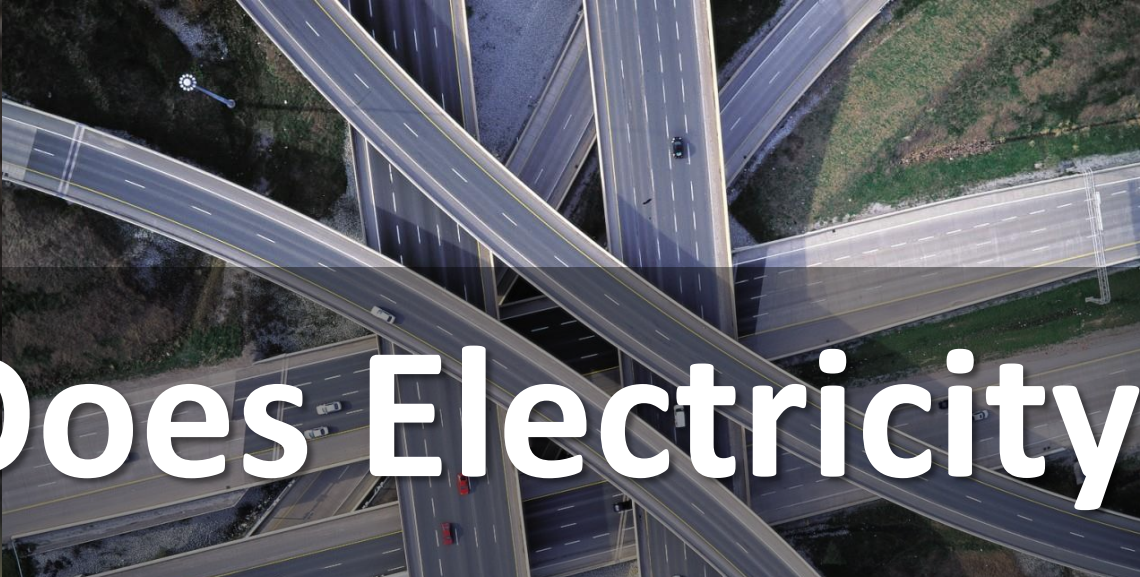
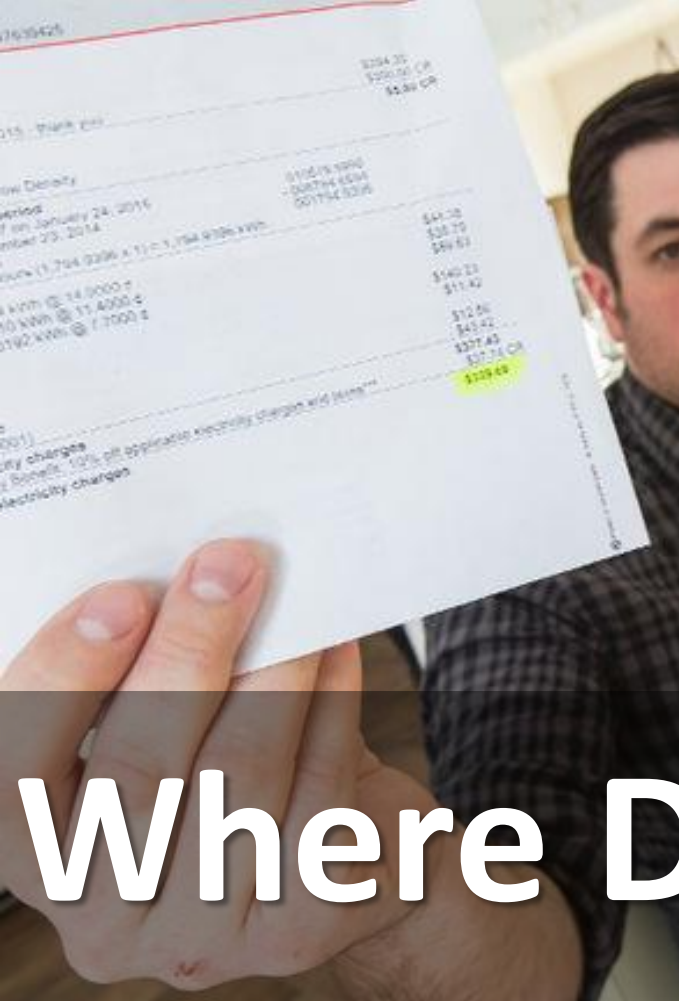
Sample Size: n=600

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

Field Dates: September 15-24, 2016

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.



Where Does Electricity Fit?

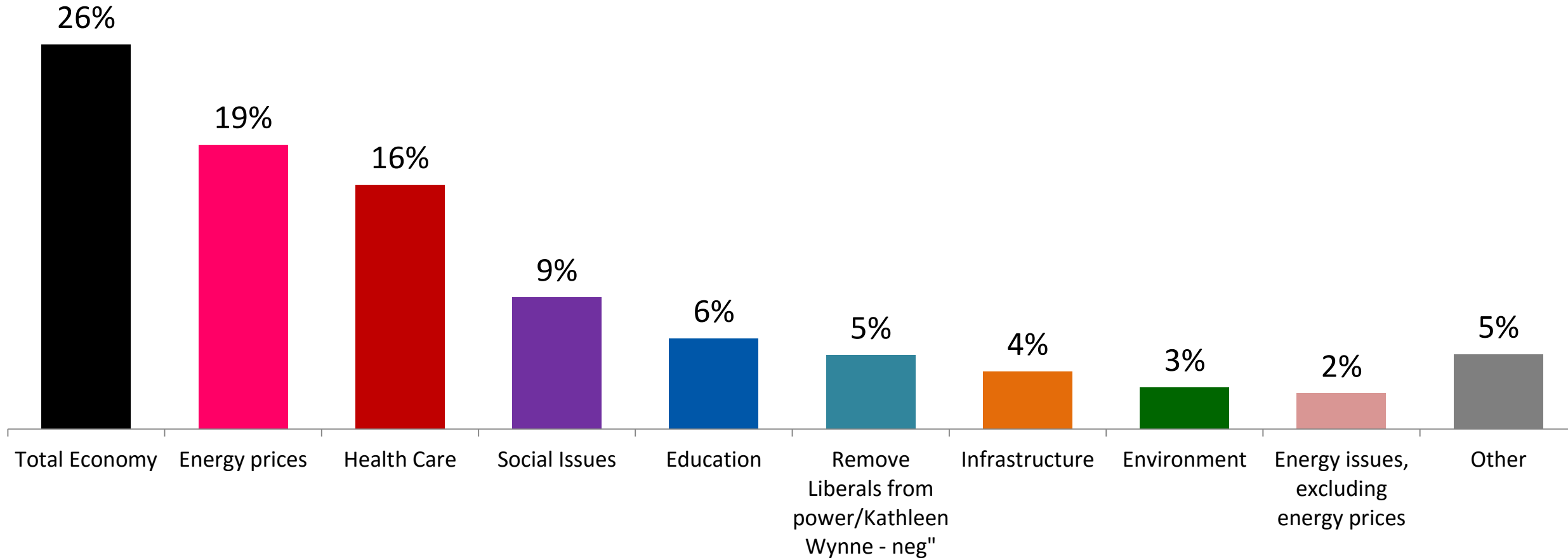


Leading Issues: energy prices (19%) as second most important issue following Total Economy (26%)



What is the most important issue in Ontario today, in other words, the one that concerns you personally the most?

[asked of all respondents]



Note: 'Refused' and 'Don't Know' (4%) not shown

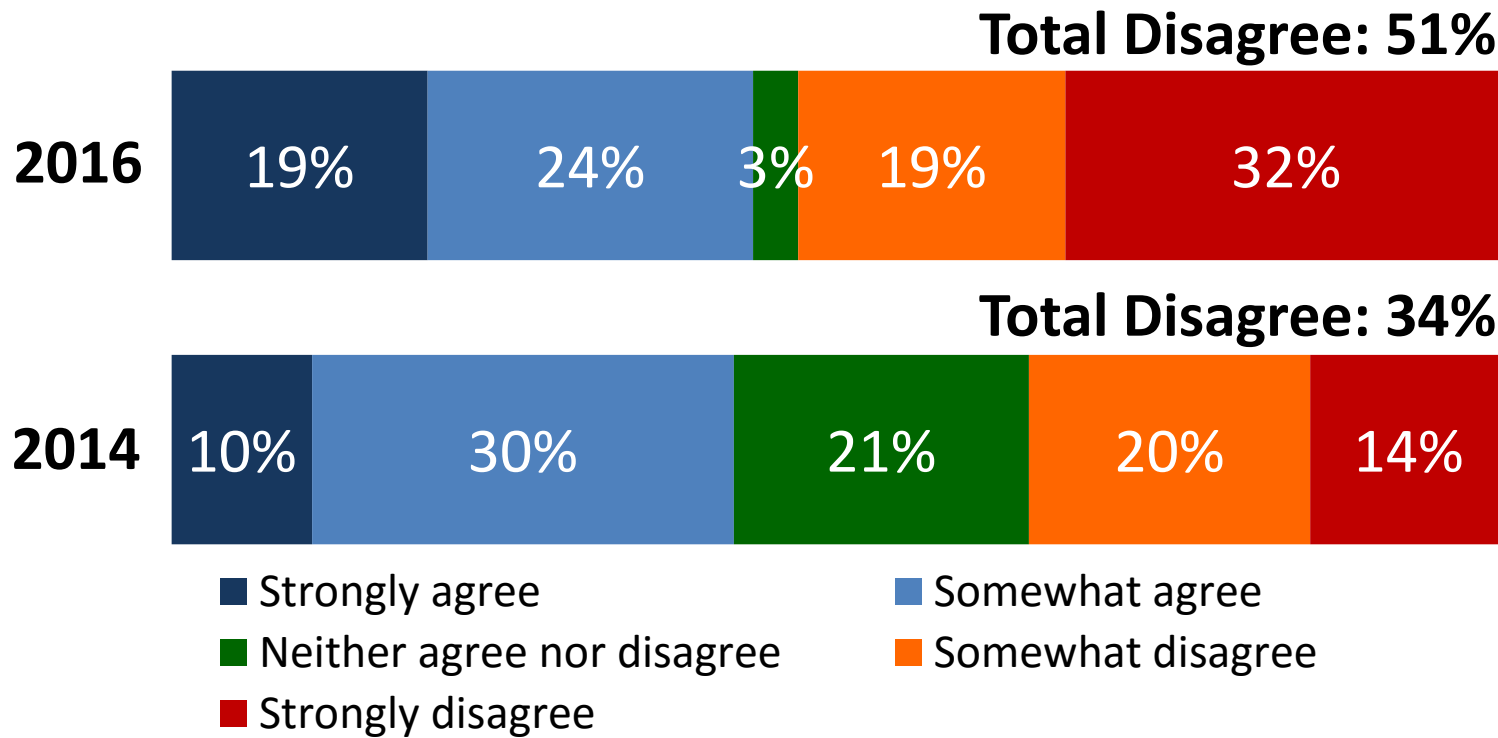
Majority (51%) feel party stands on electricity matter to their vote - up 17 points in two years



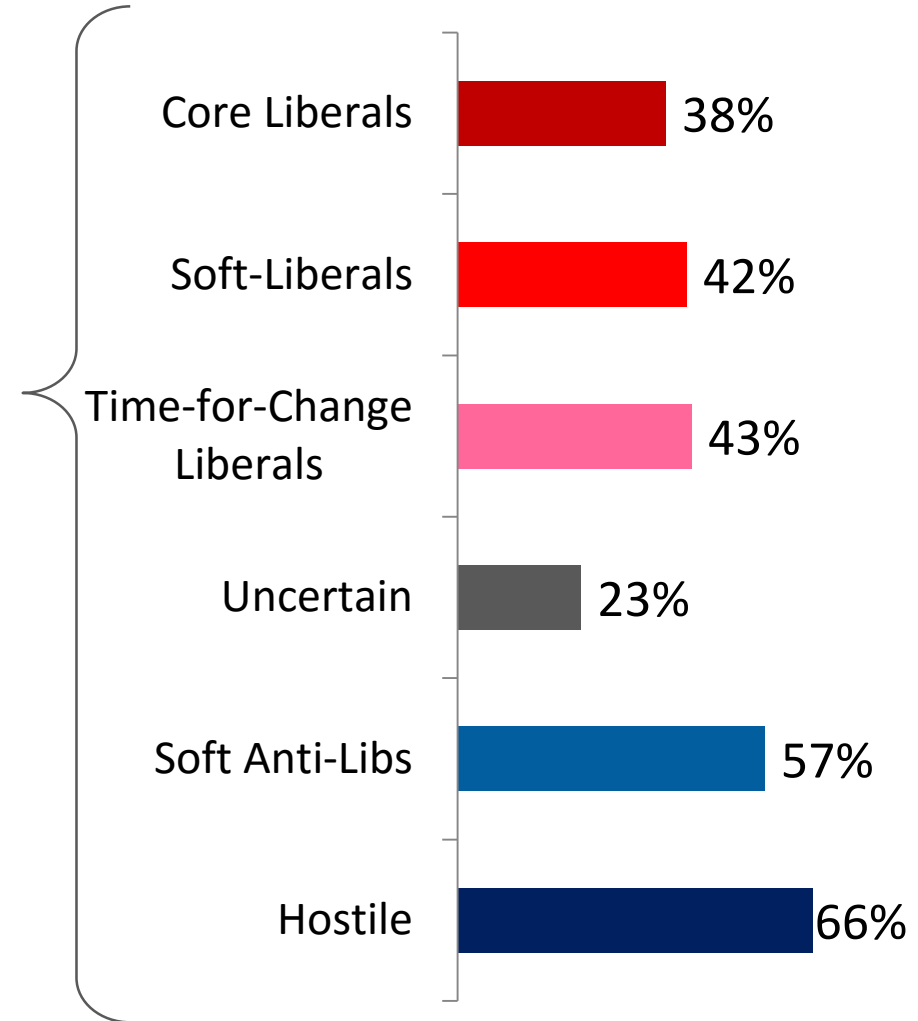
Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following point of view:

There are a lot of other issues that are more important to me when it comes to deciding which political party to vote for. It doesn't really matter to me where a party stands on electricity.

[asked of all respondents]



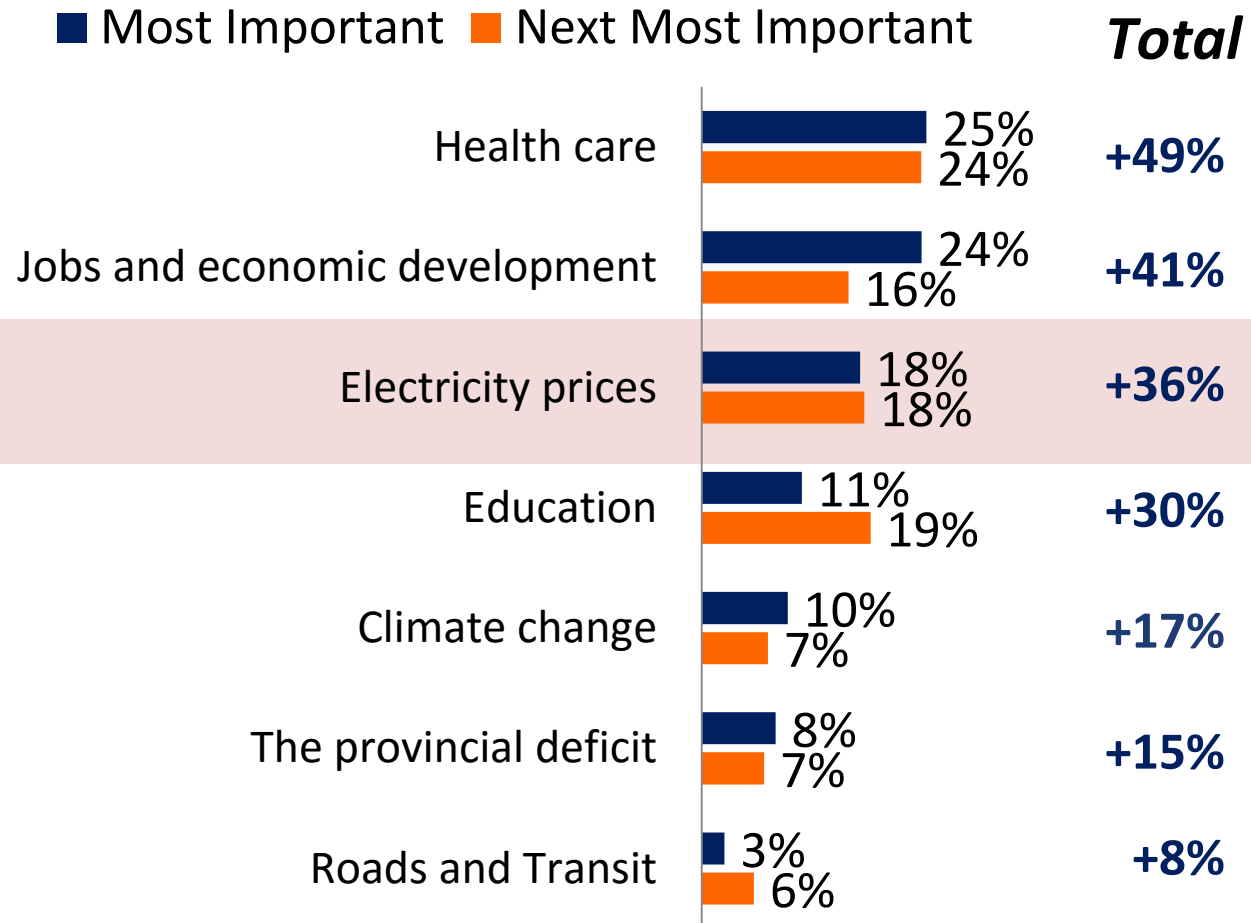
2016 Time-for-Change Segmentation ▶▶ Total Disagree" on Party Energy Stance:



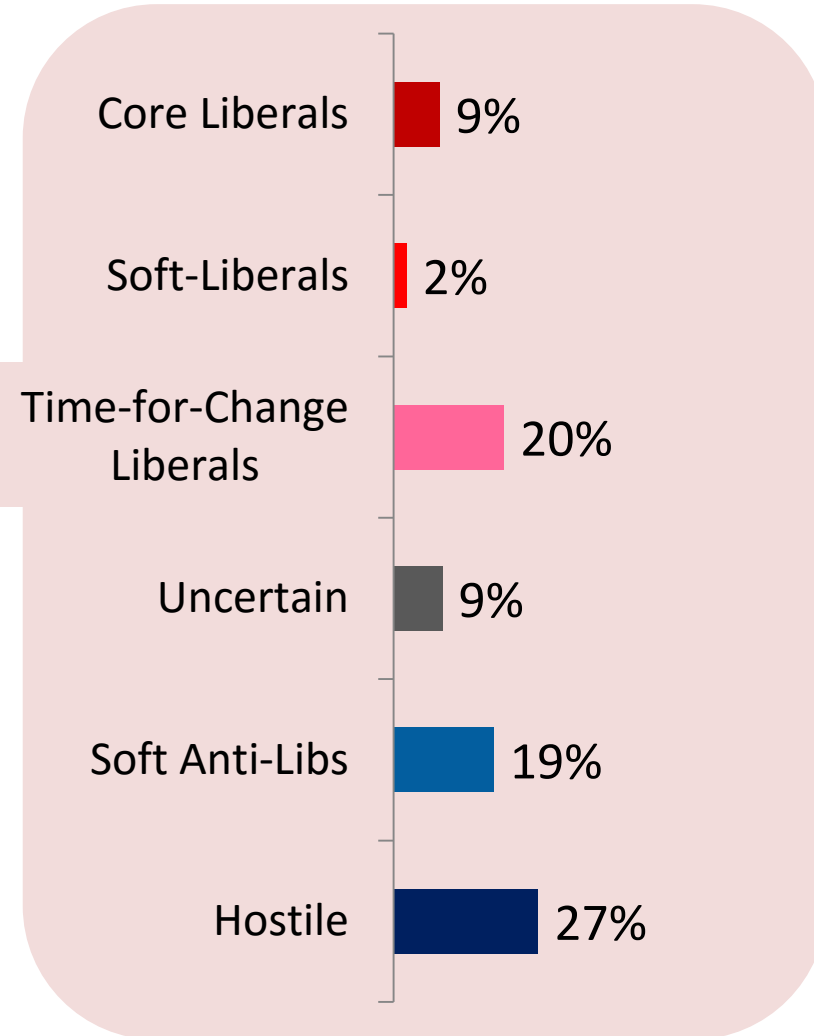
Note: 'Don't Know / Refused' not shown

Issue Priority: electricity prices most important to anti-Lib groups and Time-for-a-change Liberals

Q I am going to read to you a list of issues, and I'd like you to tell me which is MOST important to you? ... And which is the *next most important*?
[asked of all respondents]



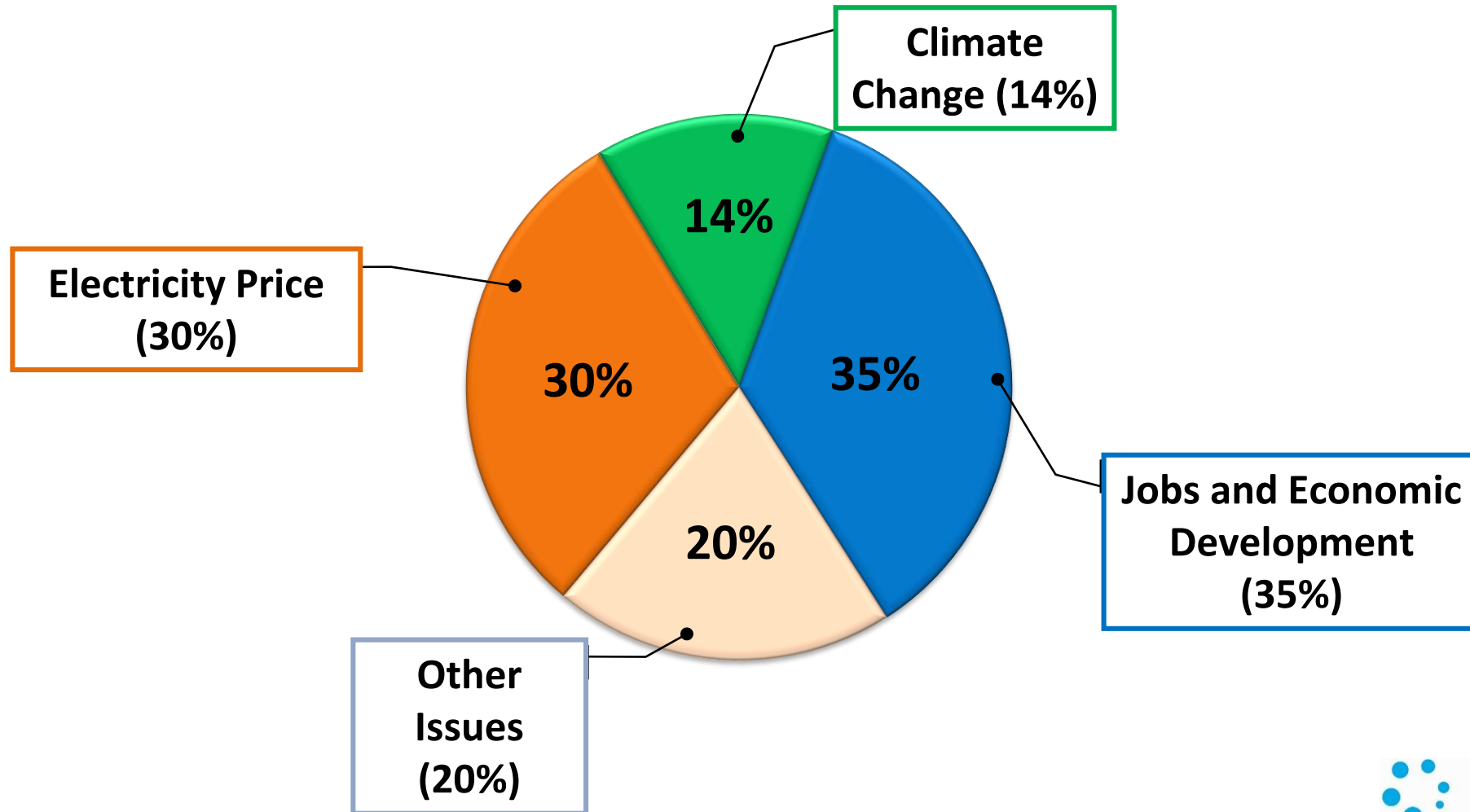
2016 Time-for-Change Segmentation ►► *Electricity Prices*

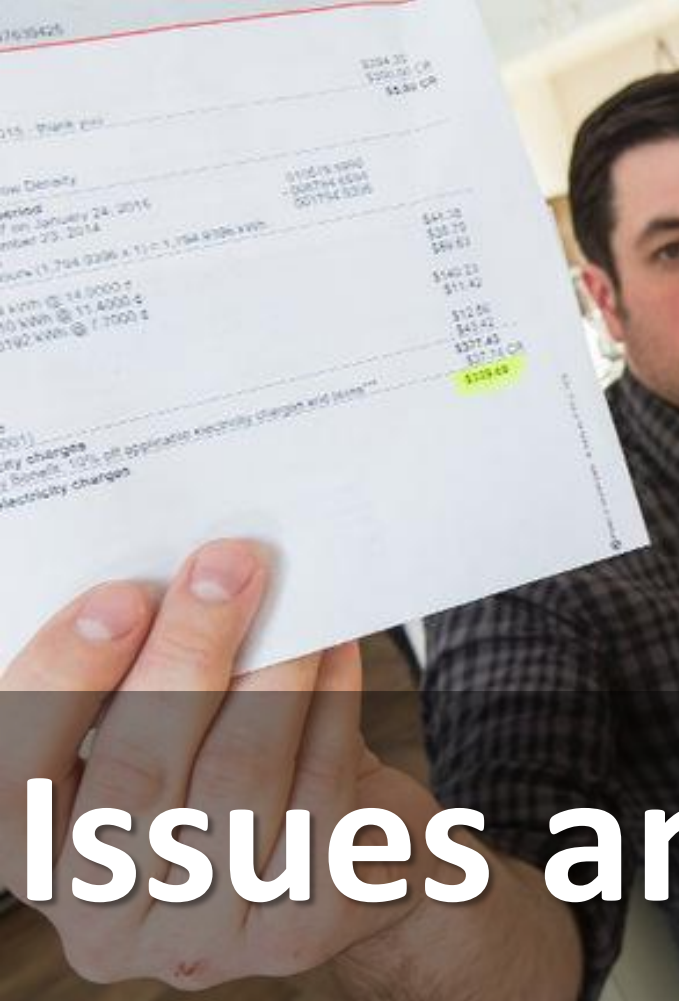


Note: 'Something else' (3% combined), 'Don't know' (1%) and 'Refused' (<1%) not shown.

Pocketbook items trump climate change concerns

We have segmented groups of respondents by the priority they place on three target issues: “electricity prices”, “climate change” and “price and economic development” (short-hand: “jobs”) among the full list of issues.





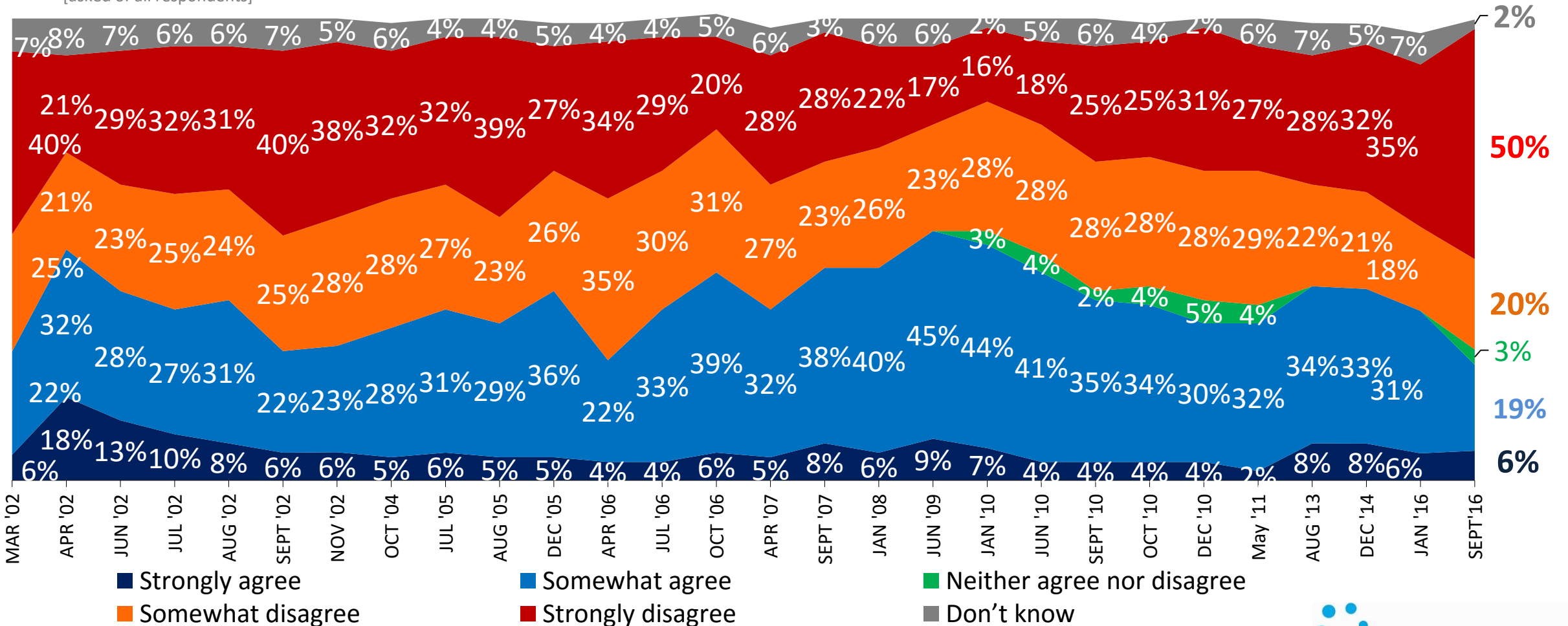
Issues and Priorities



Ontarians have never been this angry

Q Would you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement?
Consumers are well-protected with respect to prices and the reliability and quality of electricity service in Ontario.

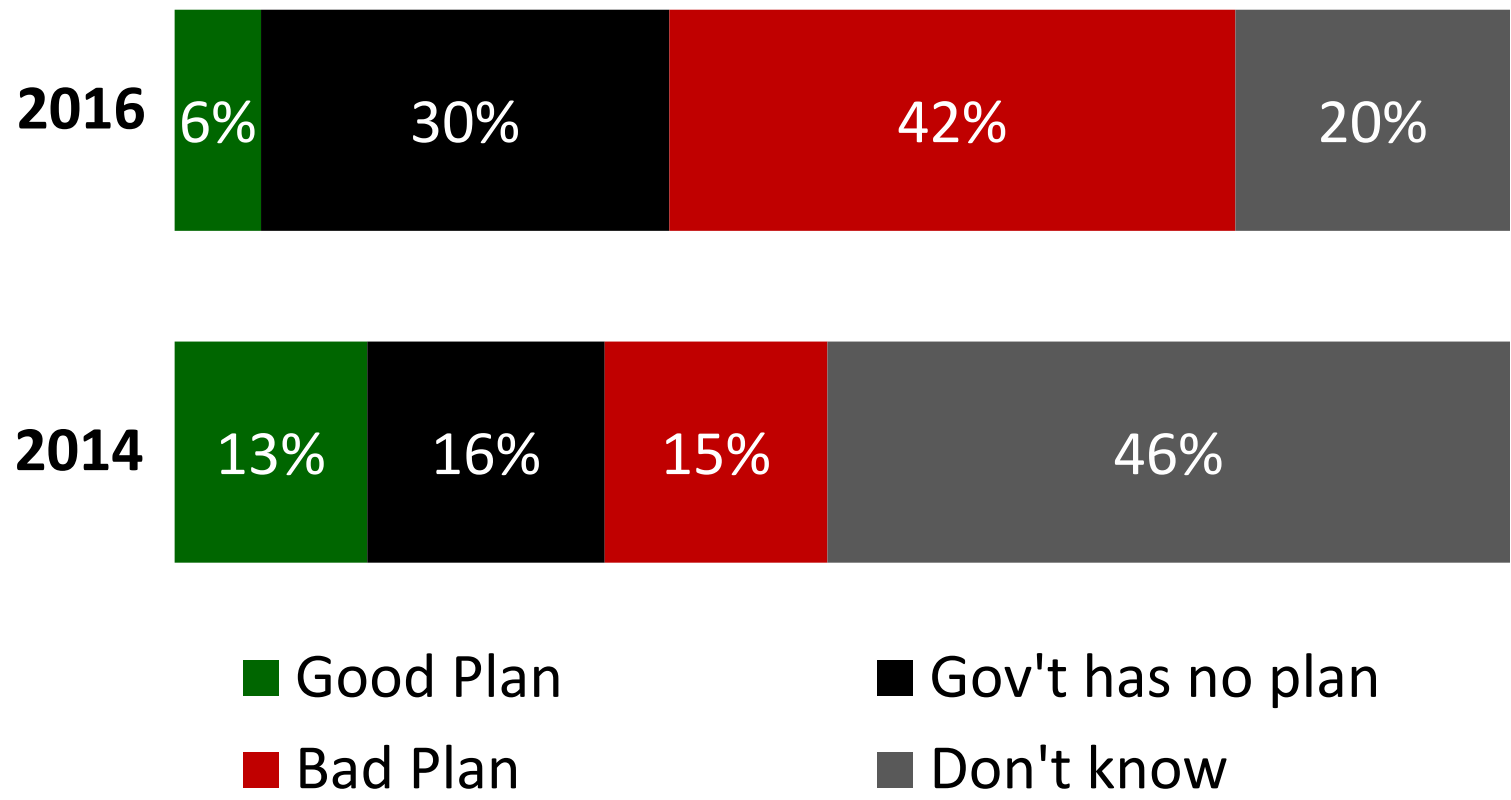
[asked of all respondents]



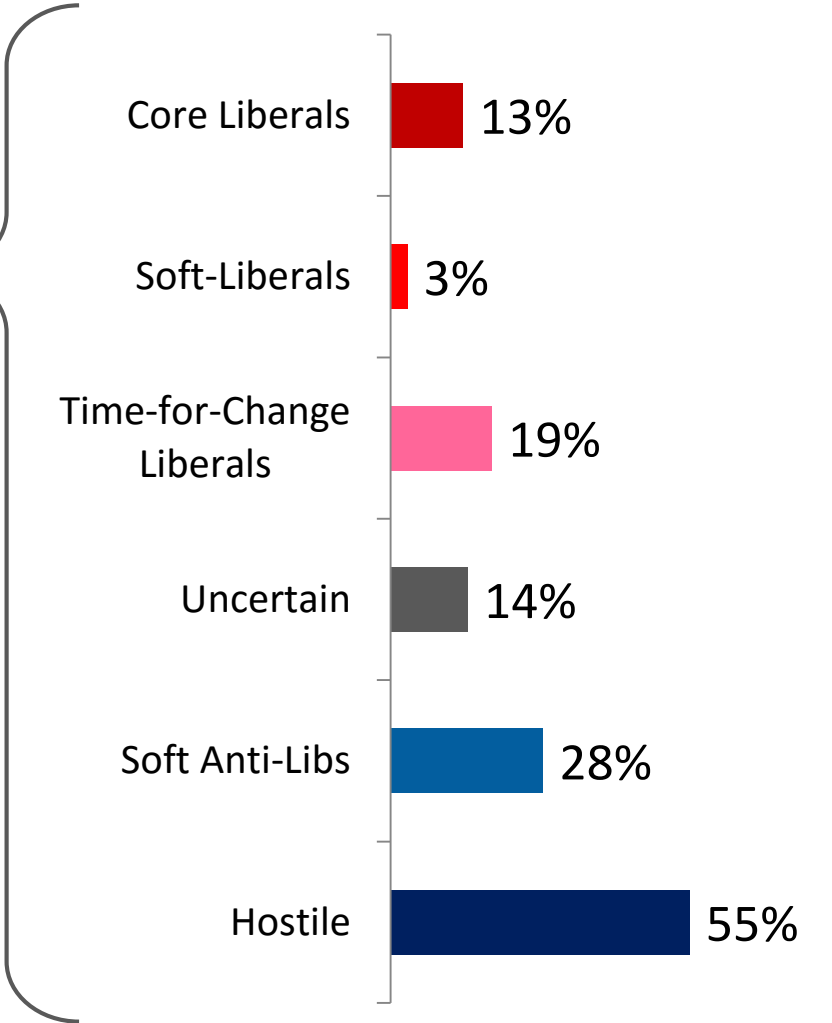
Note: "Refused" not shown. The question in Nov '02 is asked differently, "Do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. Consumers are well protected with respect to prices and the reliability and quality of electricity service in Ontario."

Government Electricity Plan: plurality (42%) now think electricity plan a "bad" one; 55% of "hostile" group feels the same

Q 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?
[asked of all respondents]



2016 Time-for-Change Segmentation ▶▶ *Those who say "Bad Plan":*



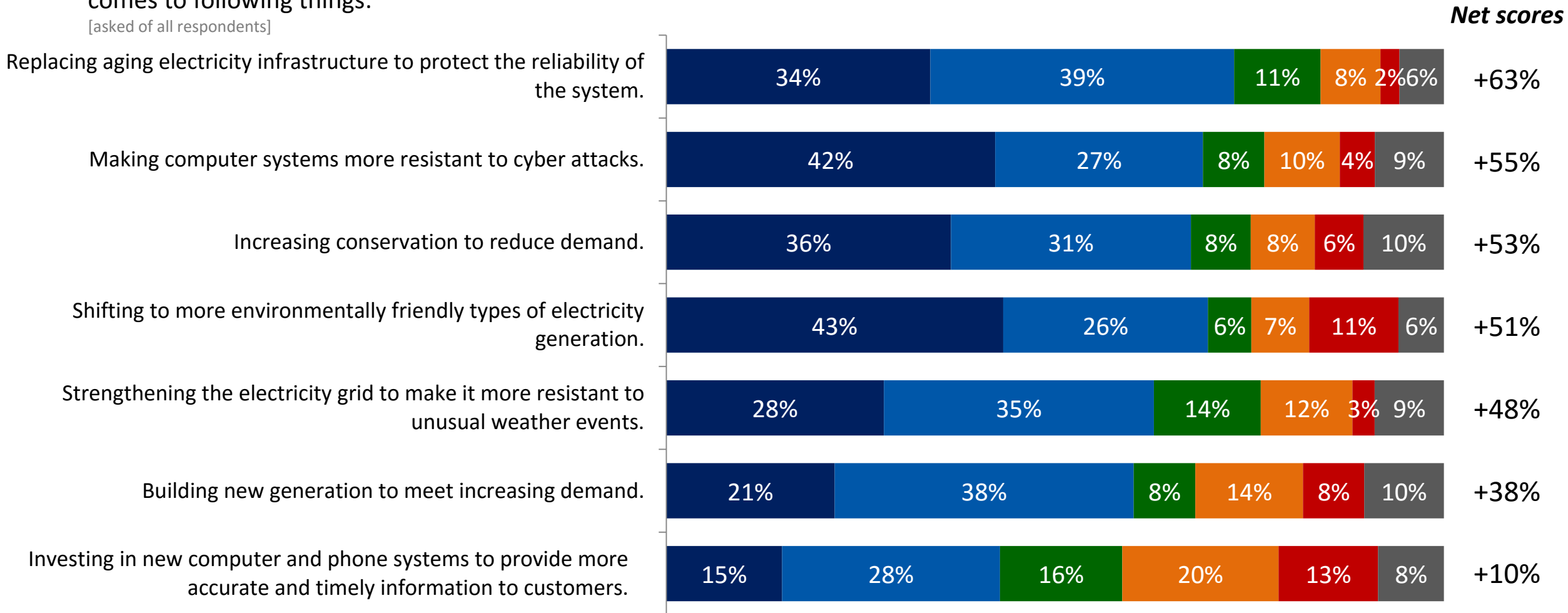
Note: 'Don't Know / Refused' not shown

Electricity Priorities: In most areas, Ontarians want to see more effort made to improve the electricity



Below is a list of key elements of the electricity system. Keeping in mind that doing more means higher electricity bills, please indicate if you think the electricity system is making the right amount of effort, needs to do more, or needs to do less when it comes to following things:

[asked of all respondents]



Note: 'Refused' not shown.

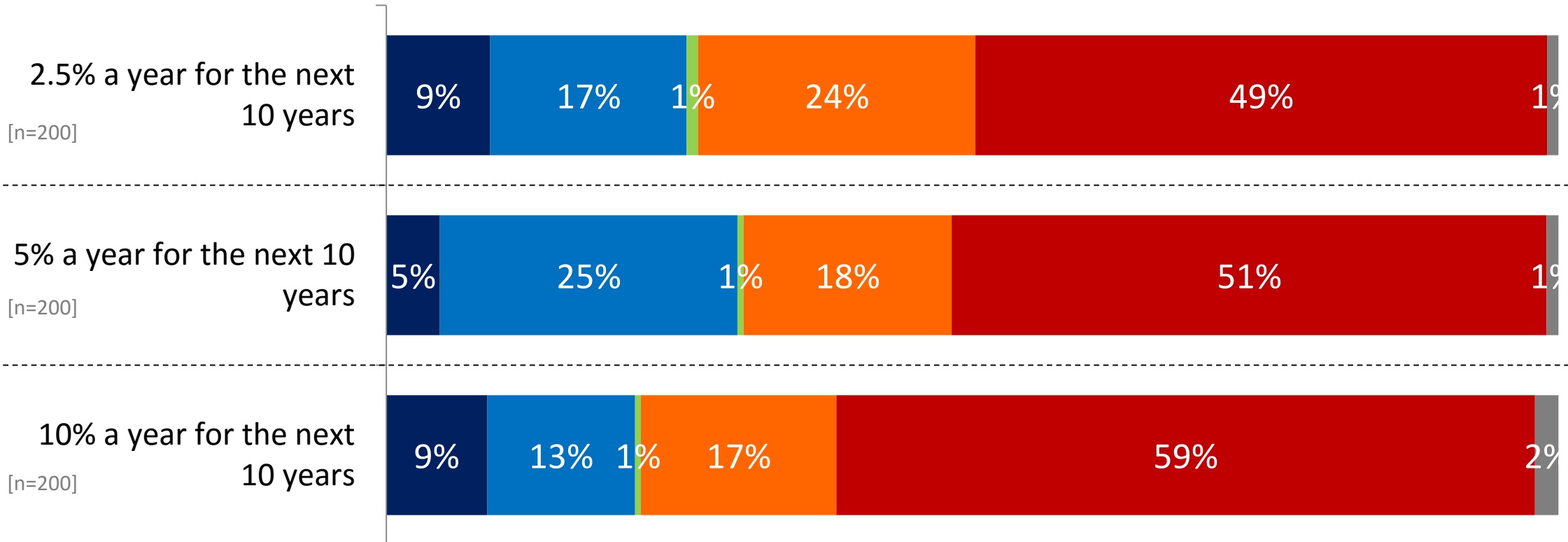
■ A lot more
 ■ Somewhat more
 ■ Neither more nor less
 ■ Somewhat less
 ■ A lot less
 ■ Don't know

Long Term Energy Plan [Split Sample]: A strong majority don't want to pay more for improvements ¹²



The government is consulting now on a Long Term Energy Plan that will address all the issues we just discussed. Electricity prices will have to rise to pay for that plan. The more we pay, the more quickly we can implement the plan. Would you support or oppose implementing that plan if your electricity bill will grow by...

[asked of all respondents; split sample equally into three parts]



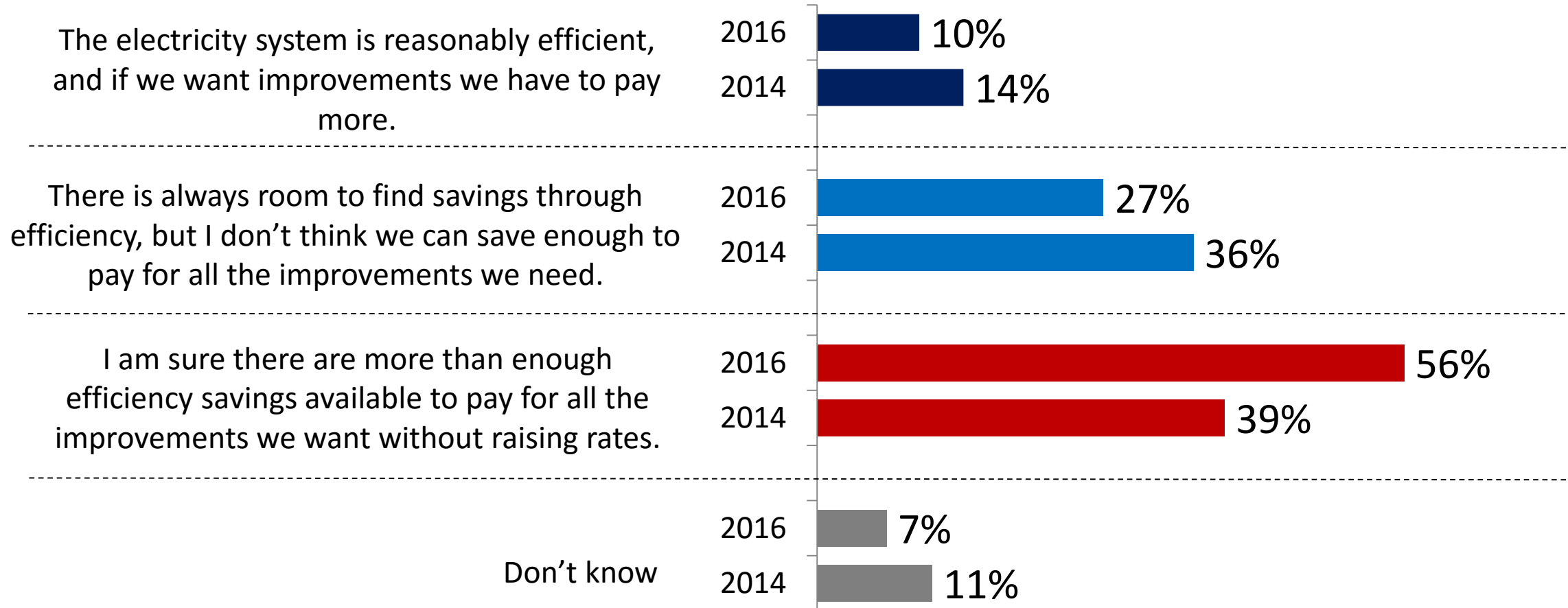
- Strongly support
- Somewhat support
- Neither support nor oppose
- Somewhat oppose
- Strongly oppose
- Don't know

Finding Efficiencies: Majority (56%) now think there are enough savings to pay for improvements without higher rates



Which of the following points of view is closer to your own?

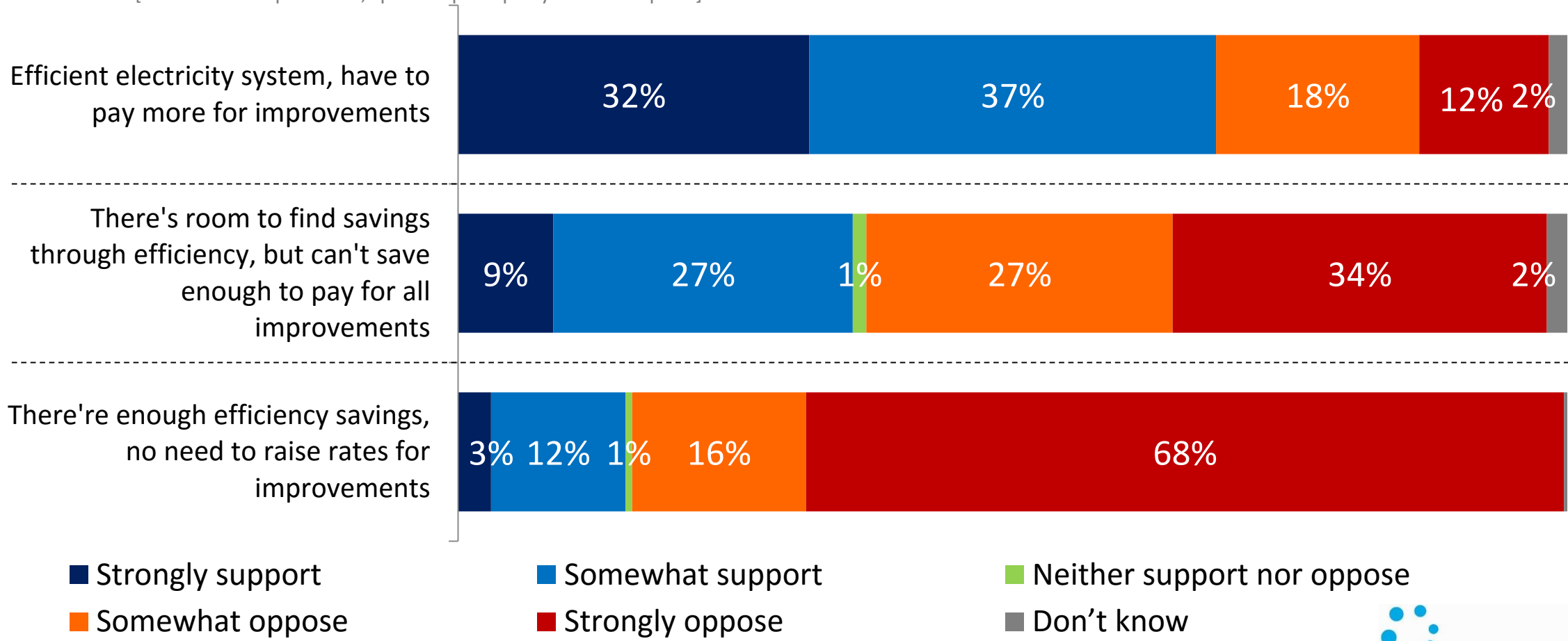
[asked of all respondents]



Long Term Energy Plan: those who think the electricity system is efficient more willing to pay for Long Term Energy Plan ¹⁴



The government is consulting now on a Long Term Energy Plan that will address all the issues we just discussed. Electricity prices will have to rise to pay for that plan. The more we pay, the more quickly we can implement the plan. Would you support or oppose implementing that plan if your electricity bill will grow by [2.5%/5%/10%] a year for the next 10 years? **BY** Perception of waste [asked of all respondents; split sample equally into three parts]

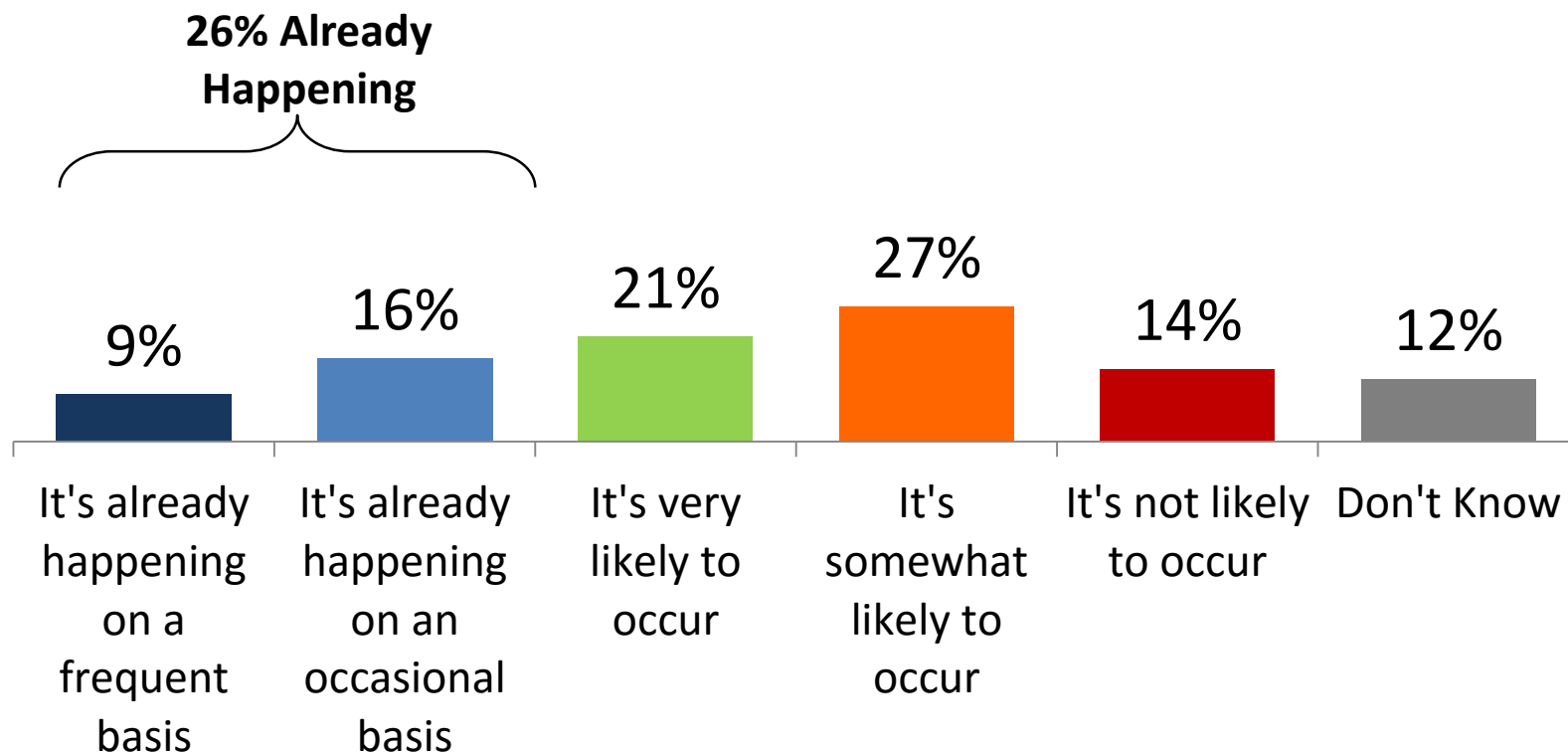


Note: 'Refused' (<1%) not shown

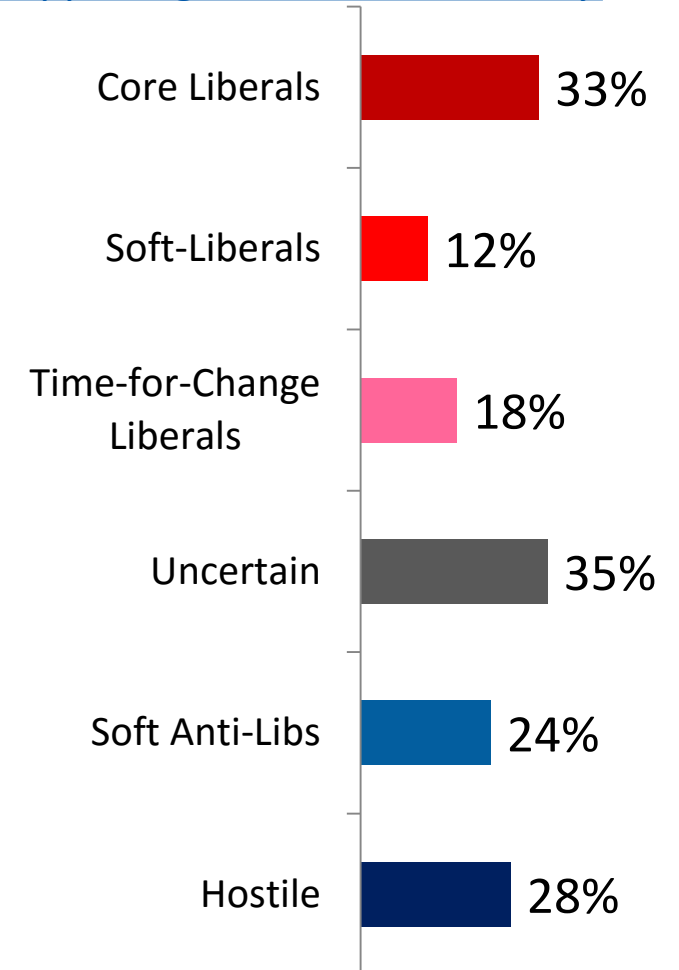
Cyber Security

Cyber attacks on gas and electricity systems: 1-in-4 (26%) say it's already happening, just 14% say "it's not likely to occur"

Q How likely do you think it is that hackers will try and attack computer systems in the natural gas and electricity systems? Would you say...
[asked of all respondents]



Time-for-Change Segmentation ▶▶
Those who say "it's already happening at least occasionally":



Note: 'Refused' (<1%) not shown.

Investing in Security: plurality think security systems should make protecting infrastructure 1st priority over consumer data

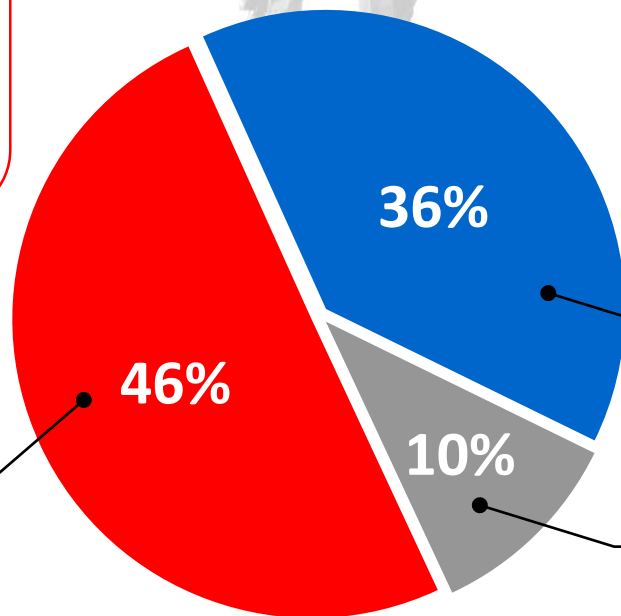
Q When natural gas and electricity utilities invest in making their security systems more secure, what should be their first priority?
[asked of all respondents]

Smith says:

Protecting the energy system from cyber-attacks on the computers systems that operate energy infrastructure.

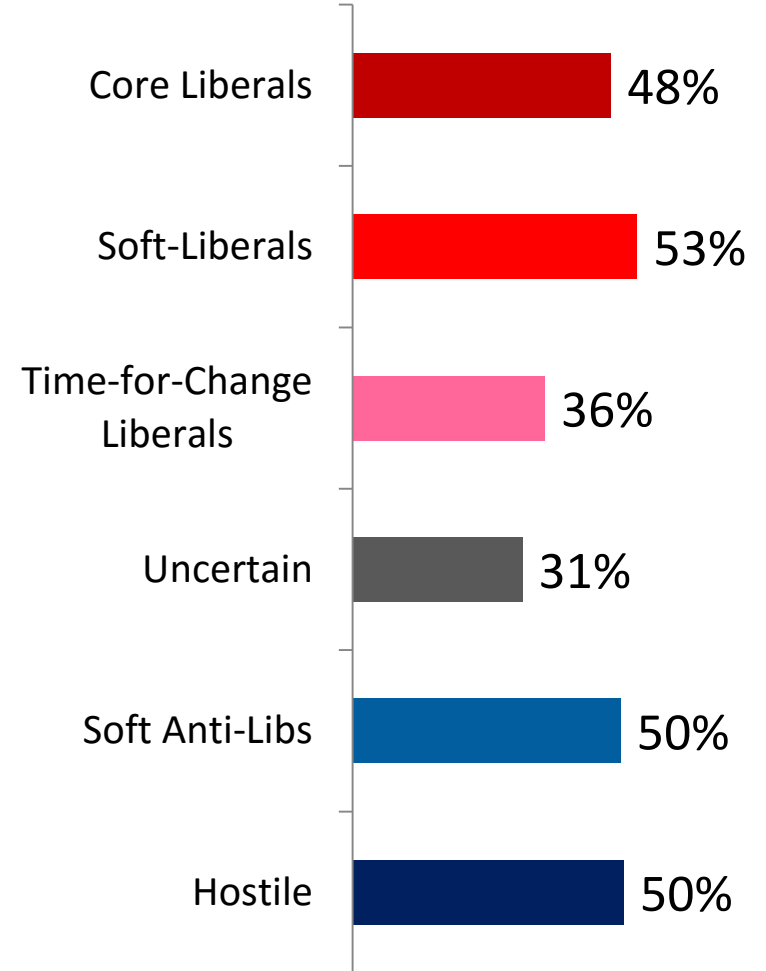
Jones says:

Protecting the energy system from cyber-attacks on the computers systems that store personal consumer data.



Time-for-Change Segmentation ▶▶

Those who say "protect systems that operate infrastructure":



Note: 'Both' (6%) and 'Refused' (1%) not shown.

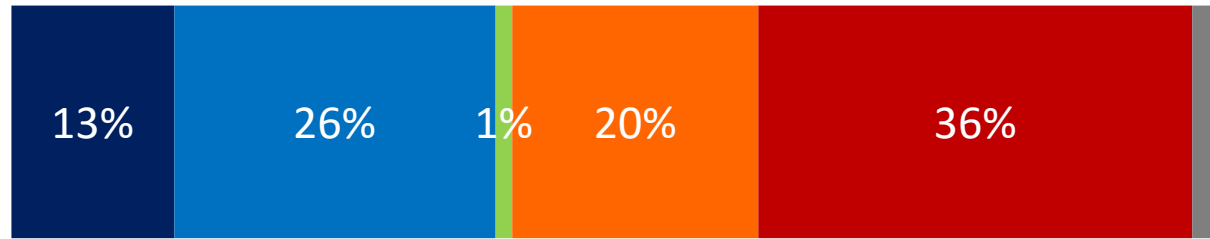
Additional Payments for Increased Security: majority oppose

any increase

Q Keeping up with new developments in computer security can be expensive. Would you support or oppose paying an additional [**\$2/\$5**] a month on your gas and electricity bills to ensure your utility is using the most up to date computer technology and software? Would you say you...
[asked of all respondents; split sample into two equal parts]

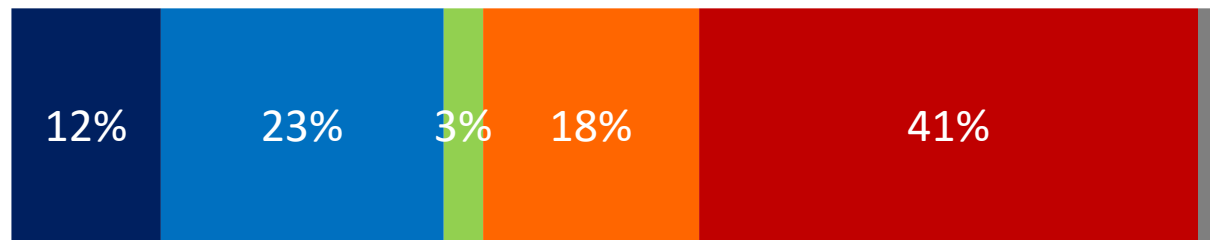
Additional \$2 a month

[n=300]



Additional \$5 a month

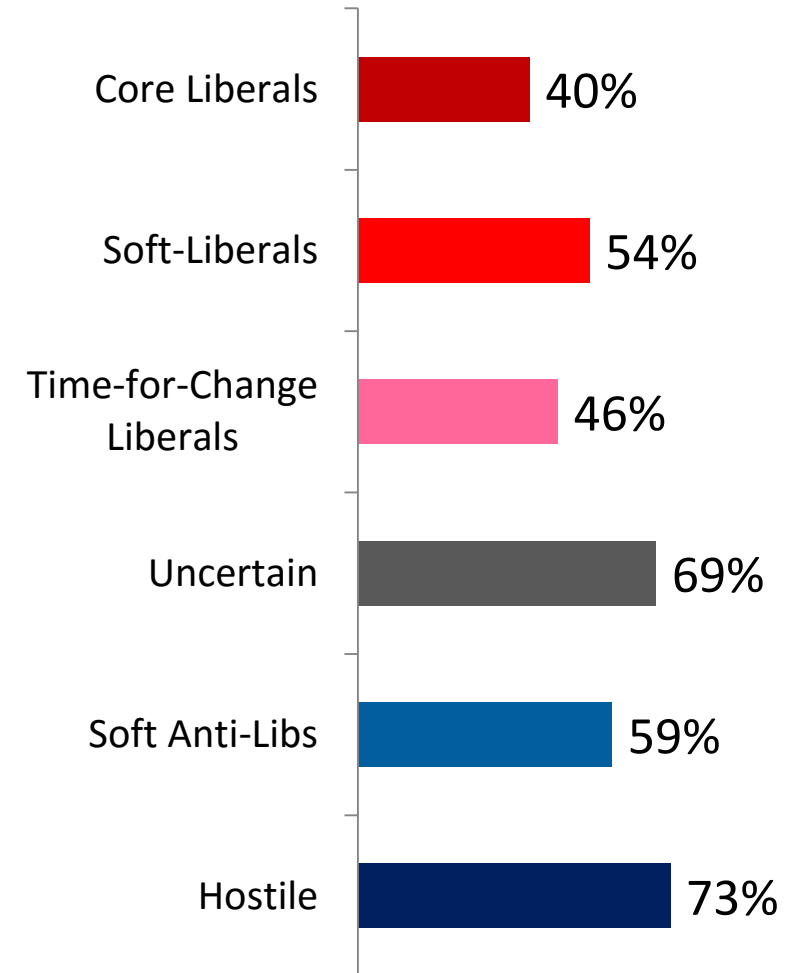
[n=300]



- Strongly support
- Somewhat support
- Neither support nor oppose
- Somewhat oppose
- Strongly oppose
- Don't know

Time-for-Change Segmentation ▶▶

Those who say "oppose" [average of \$2 and \$5 monthly increase]:

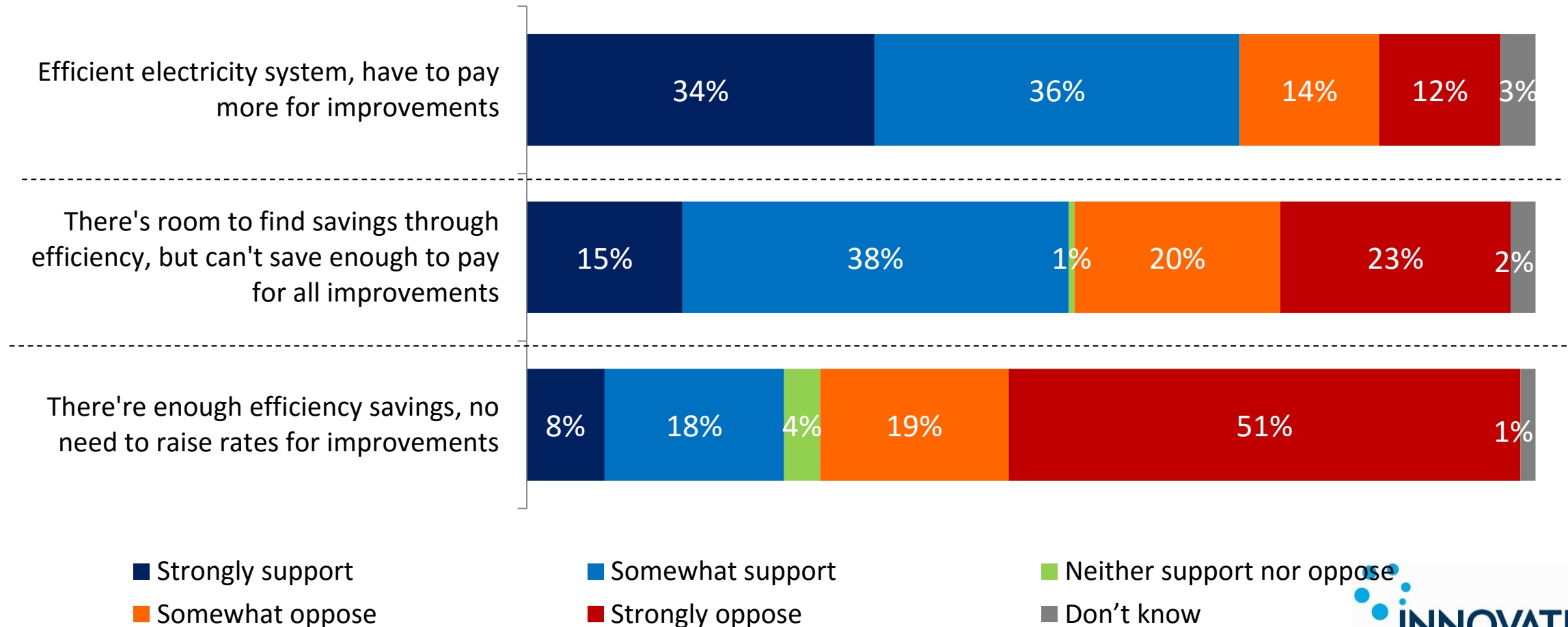


Additional Payments for Increased Security: those who say the system is efficient more willing to pay for cyber security



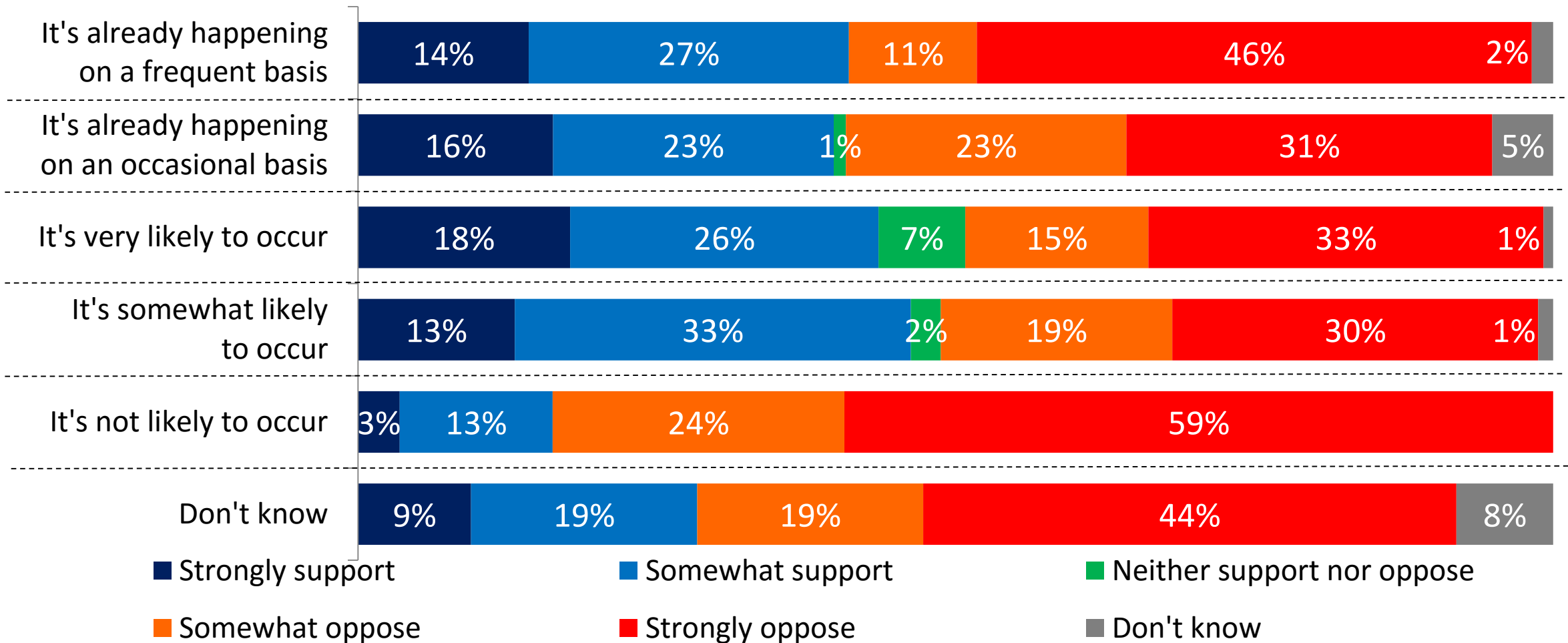
Keeping up with new developments in computer security can be expensive. Would you support or oppose paying an additional [\$2/\$5] a month on your gas and electricity bills to ensure your utility is using the most up to date computer technology and software? Would you say you... **BY** Perception of waste

[asked of all respondents; split sample into two equal parts]



Willingness to pay: nearly half of those who think cyber attacks are happening frequently oppose paying more

Q Keeping up with new developments in computer security can be expensive. Would you support or oppose paying an additional [\$2/\$5] a month on your gas and electricity bills to ensure your utility is using the most up to date computer technology and software? Would you say you... **BY** How likely do you think it is that hackers will try and attack computer systems in the natural gas and electricity systems? Would you say... [asked of all respondents]



Note: 'Refused' (<1%) not shown

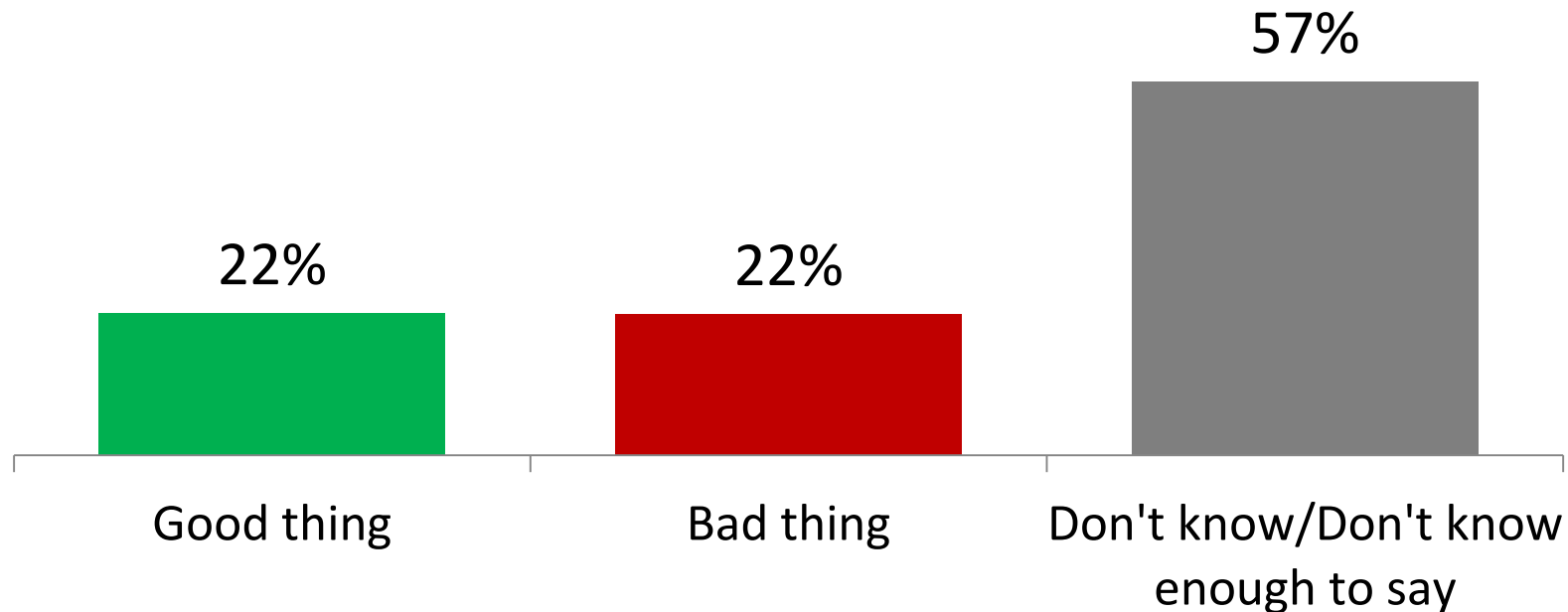
Cap-and-Trade

RSH: Cap and Trade Program: most don't know the issue and those that do are conflicted; Core libs most supportive of it

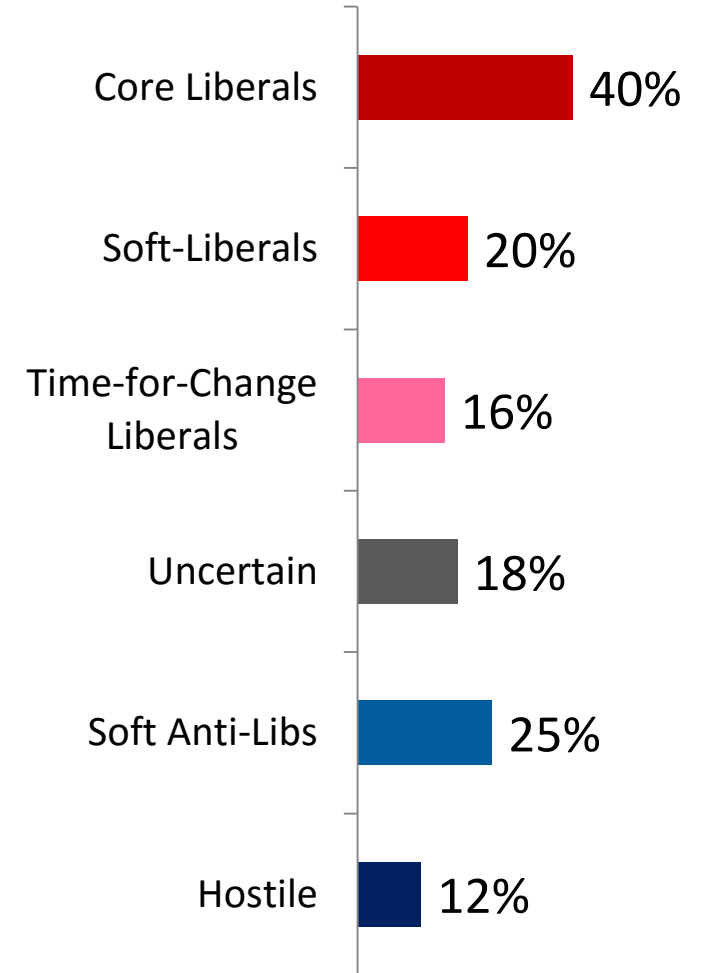
Q The Ontario government has a plan to introduce a “Cap and Trade” program to reduce greenhouse gas emissions.

From what you have read, seen or heard or from your first impression, does introducing a “Cap and Trade” program to reduce greenhouse gas emissions in Ontario sound like a good thing or a bad thing or do you not know enough to say?

[asked of all respondents]



Time-for-Change Segmentation ▶▶
Those who say “Good thing”



The Cost of Carbon Pricing: majority oppose all bill increase for cap and trade; TfC and Core Libs most supportive of increase²³

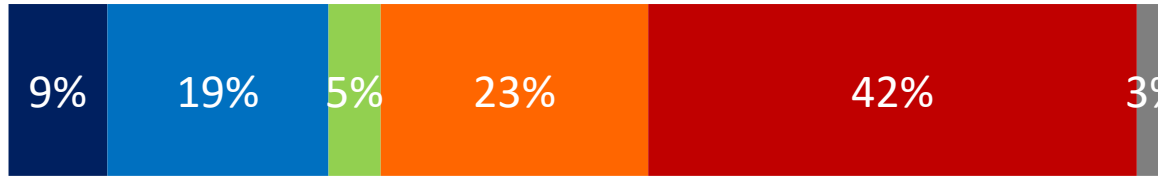
Q Cap and trade will create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks.

Would you support or oppose implementing that plan if your energy bills will grow by **5%/10%/15%** a year for the next 10 years? Would you say you...

[asked of all respondents; split sample equally into three parts]

5% a year for the next 10 years

[n=200]



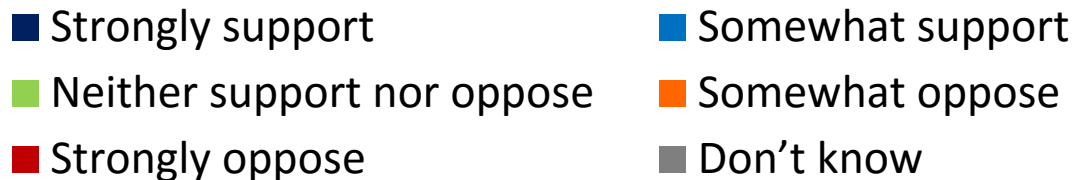
10% a year for the next 10 years

[n=200]



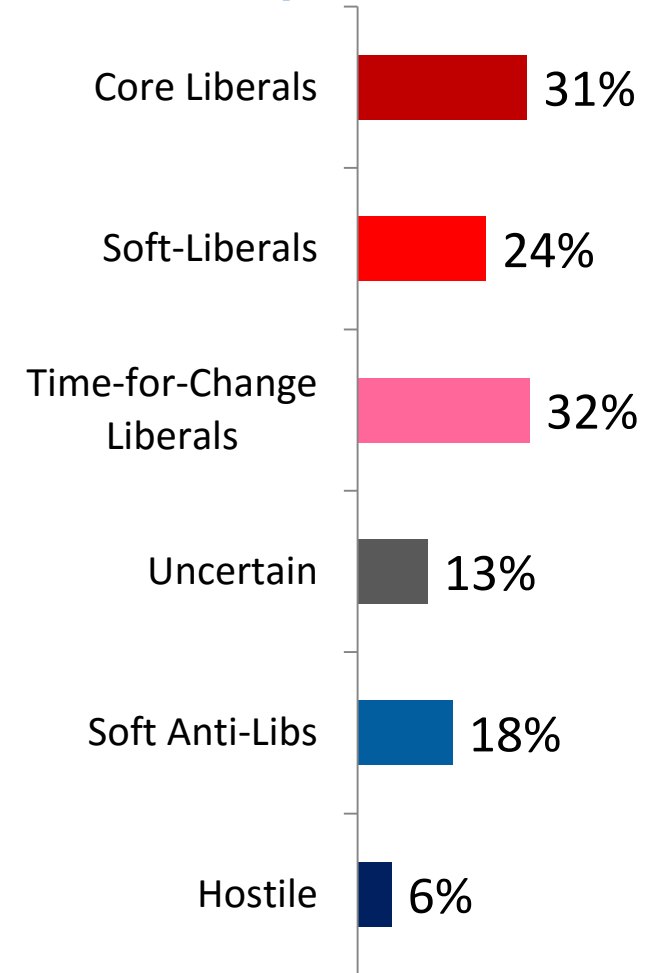
15% a year for the next 10 years

[n=200]



Time-for-Change Segmentation ▶▶

Those who say "support" [average of all three increases]



The Cost of Carbon Pricing: those who say the system is efficient more willing to pay for cap and trade

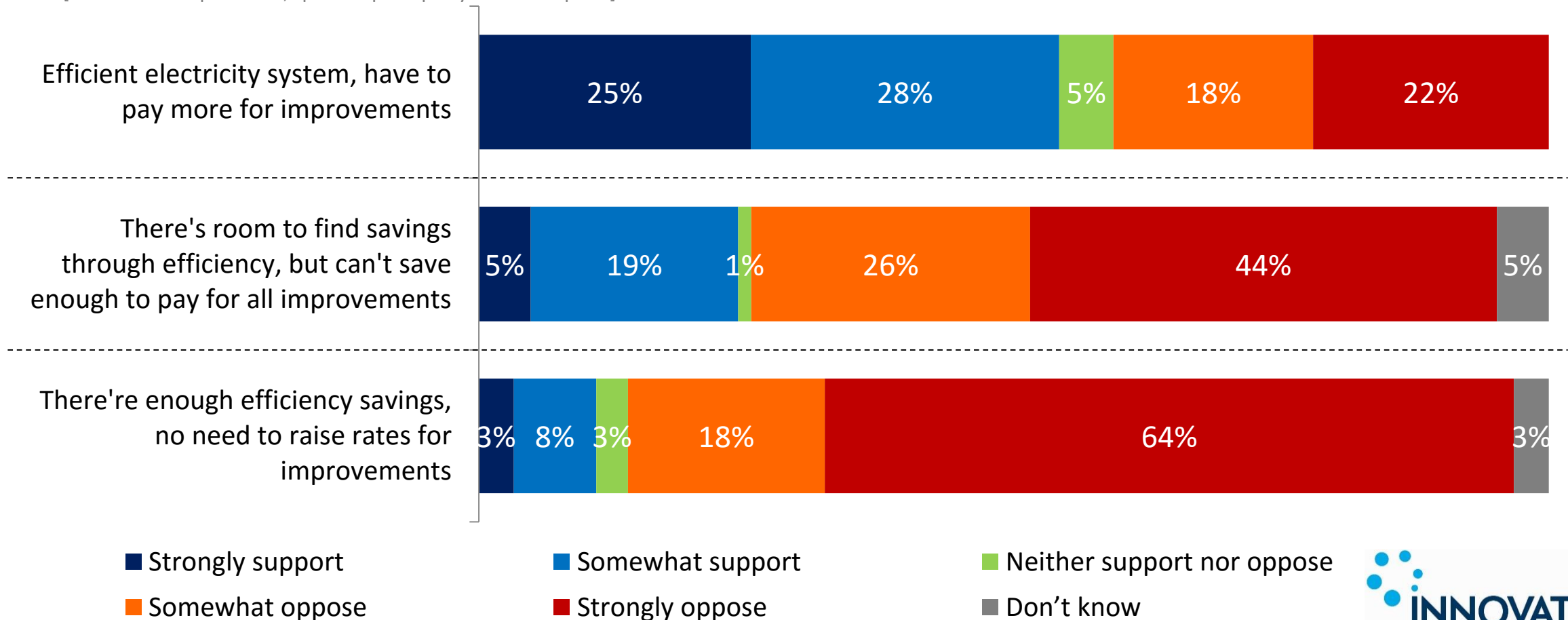


Cap and trade will create a price for carbon in the energy we use. This includes carbon-based electricity generation such as natural gas, coal or oil, home heating fuels and gasoline and diesel used in cars and trucks.

Would you support or oppose implementing that plan if your energy bills will grow by [5%/10%/15%] a year for the next 10 years?

Would you say you... **BY** Perception of waste

[asked of all respondents; split sample equally into three parts]

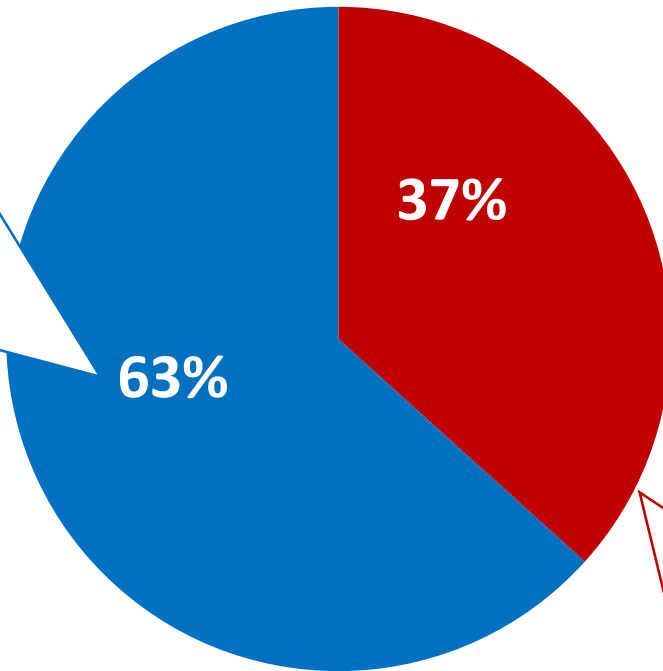


Provincial government's role in climate change: nearly two-thirds (63%) say Ontario should leave climate change to federal government

Q People have different points of view about what the provincial government can or should do when it comes to climate change. Which of the following is closest to your point of view?

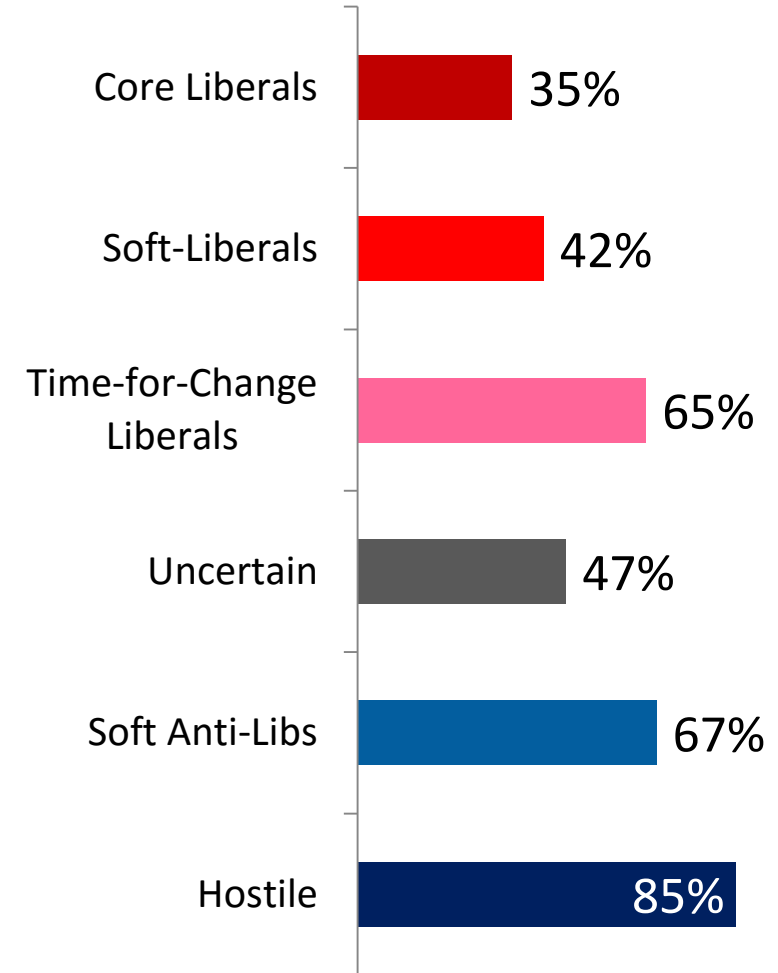
[asked of all respondents]

Some/other people say that the actions of any given province can't make any real difference to the problem of climate change and that Ontario should leave climate change to the federal government working together with other countries.



Other/some people say that climate change is a critical issue and it is a good idea for Ontario to take a leadership role, even if that means higher energy costs in Ontario than in neighbouring states and provinces.

Time-for-Change Segmentation ▶▶ Those who say "leave to federal govt"



Government's role in climate change: majority of TfC Libs and opposition think Ontario should leave climate change to federal govt

Time-For-Change Segmentation

	Core Libs	Soft Libs	TfC Libs	Uncertain	Soft Anti-Libs	Hostile
<p>... the actions of any given province can't make any real difference to the problem of climate change and that Ontario should leave climate change to the federal government working together with other countries.</p>	35%	42%	65%	47%	67%	85%
<p>... Climate change is a critical issue and it is a good idea for Ontario to take a leadership role, even if that means higher energy costs in Ontario than in neighbouring states and provinces.</p>	65%	58%	35%	53%	33%	15%

Gov't Role

Energy Politics

Priority by ID: roughly half of PC (51%) and NDP-identifiers (48%) and a plurality of Liberal (31%) and Unaligned (31%) prioritize low rates

Q And which of these priorities for the electricity system is the most important to you?
[asked of all respondents]

% who feel the electricity system needs to do more	Party ID					
	Provincial Wide	PC	Liberal	NDP	Other	Unaligned
Planning to ensure a reliable energy system for the future.	17%	20%	18%	9%	14%	16%
Keeping natural gas and electricity rates down	40%	51%	31%	48%	21%	36%
Reducing the impact of the energy system on the environment.	19%	5%	23%	24%	43%	24%
Using energy as a way of creating jobs and economic growth.	21%	22%	27%	18%	13%	17%
Don't Know	2%	1%	2%	1%	5%	5%

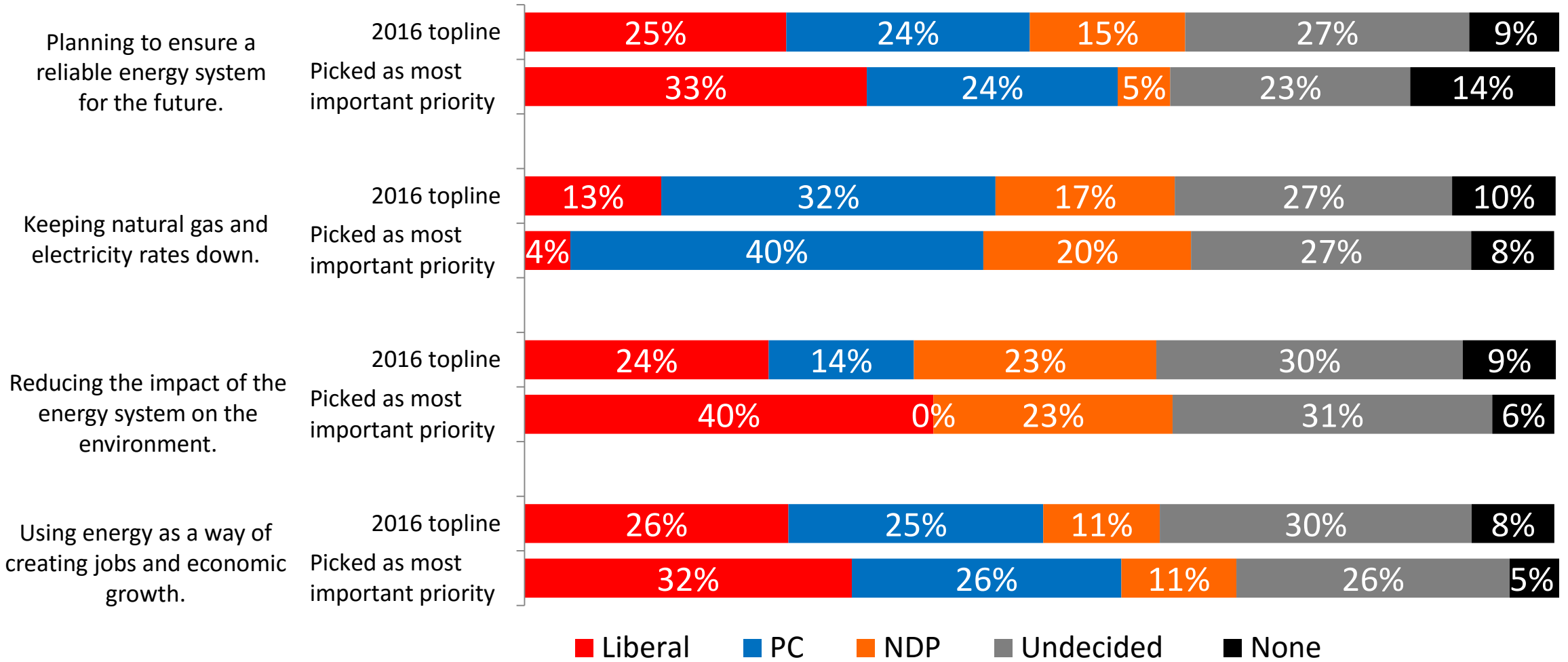
Note: 'Refused' (1%) not shown

Party Best by Top Priority: among those who think reducing impact on environment most important, Liberals hold decisive lead



Thinking about the three main political parties in Ontario – which party do you think is best when it comes to the following things? WITH And which of these priorities for the electricity system is the most important to you?

[asked of all respondents]



Note: On most important priority, 'Don't know' (2%), 'Refused' (1%).

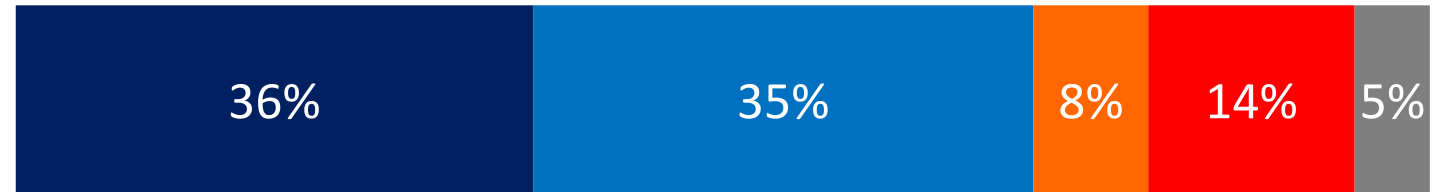
Throne Speech: strong majority support all three new electricity initiatives raised in throne speech



In last week's throne speech, the provincial government announced new initiatives for electricity. Please indicate if you strongly support, somewhat support, somewhat oppose or strongly oppose each of those initiatives:

[asked of all respondents]

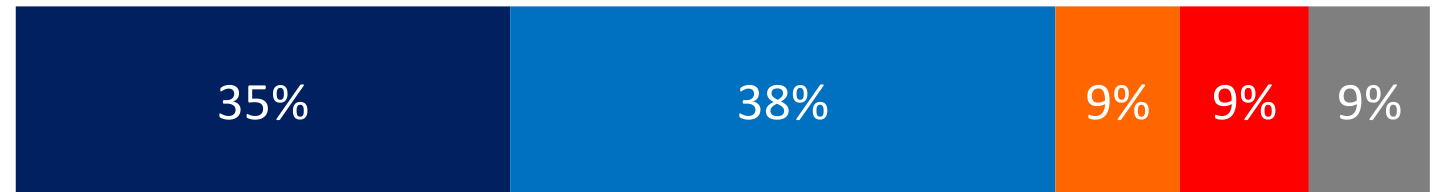
A rebate to residential consumers equal to the provincial portion of the HST on the bill providing an annual savings of \$130 a year for a typical Ontario household.



Increasing the existing rural electricity support to provide an additional average savings of approximately \$27 a month for rural households.



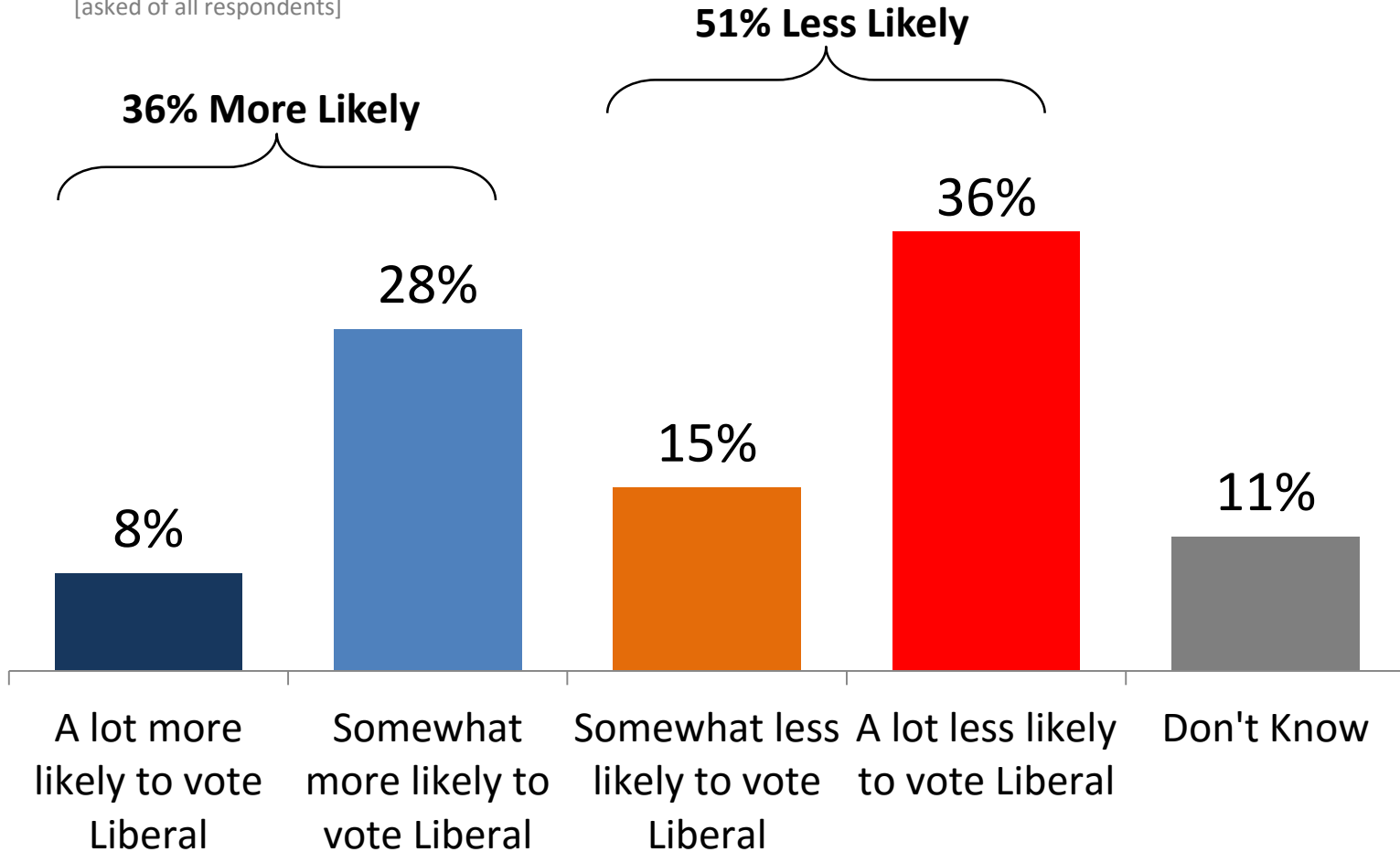
Expanding a program that incents large industrial customers to shift their electricity usage from periods of peak demand with savings up to 34%.



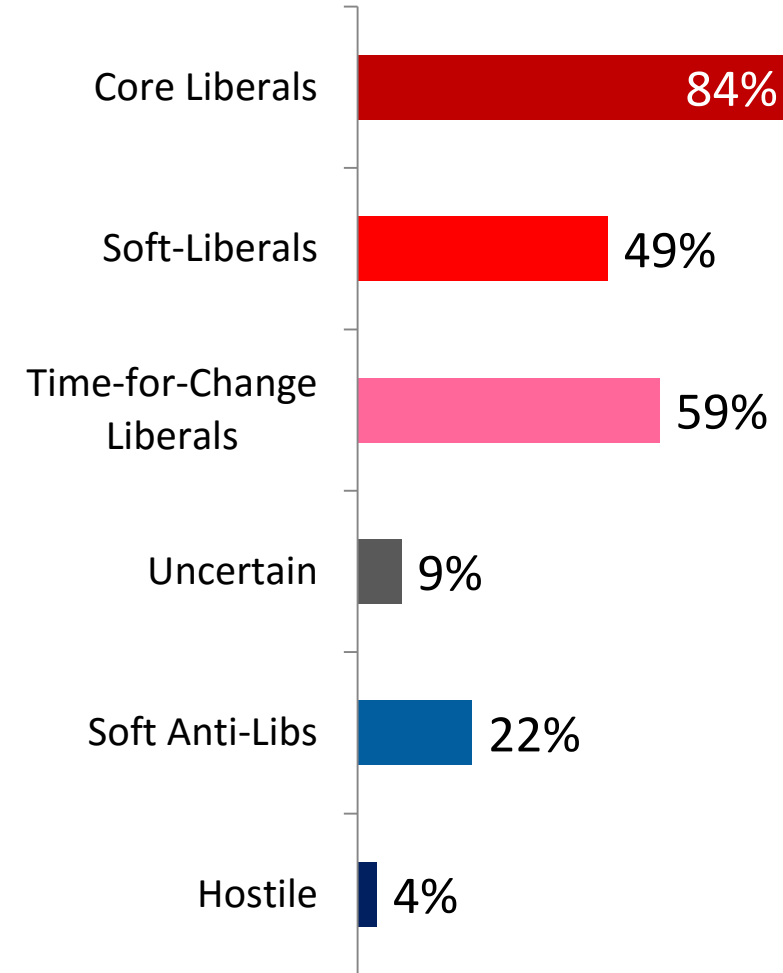
■ Strongly support
 ■ Somewhat support
 ■ Somewhat oppose
■ Strongly oppose
 ■ Don't know

Liberal Government Initiatives: despite overall support for initiatives, left Ontarians feeling less likely to vote Liberal; TfC Libs more supportive

Q After hearing about these initiatives from Kathleen Wynne’s provincial Liberal government, do they leave you feeling a lot more likely to vote Liberal, somewhat more likely, somewhat less likely or a lot less likely to vote Liberal?
[asked of all respondents]



Time-for-Change Segmentation ▶▶ *Those who say “more likely”*



Note: Refused (3%) not shown



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