

Current Electricity Attitudes

Methodology

- This presentation combines the results of three different surveys:
 - An online survey of 846 adult Ontarians on values and politics conducted from October 26th to November 8th, 2017. (Poll 1)
 - An online survey of 1,406 adult Ontarians on infrastructure and electricity conducted from November 10th to November 16th, 2017. (Poll 2)
 - A telephone study of 607 randomly-selected Ontario residents, 18 years of age and older, from November 9th to November 17th, 2017 (Poll 3)
- Detailed methodologies are provided in the appendix.
- It is important to note that margins of error can only be applied to the telephone survey.
 - The online surveys ARE representative samples. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.
- The margin of error for the telephone survey is approximately ± 4.0 (before April 2003: approximately ± 3.84)

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.*

Gov't Plan: net feeling that gov't has a good plan has increased dramatically; industry trust a potential motivator

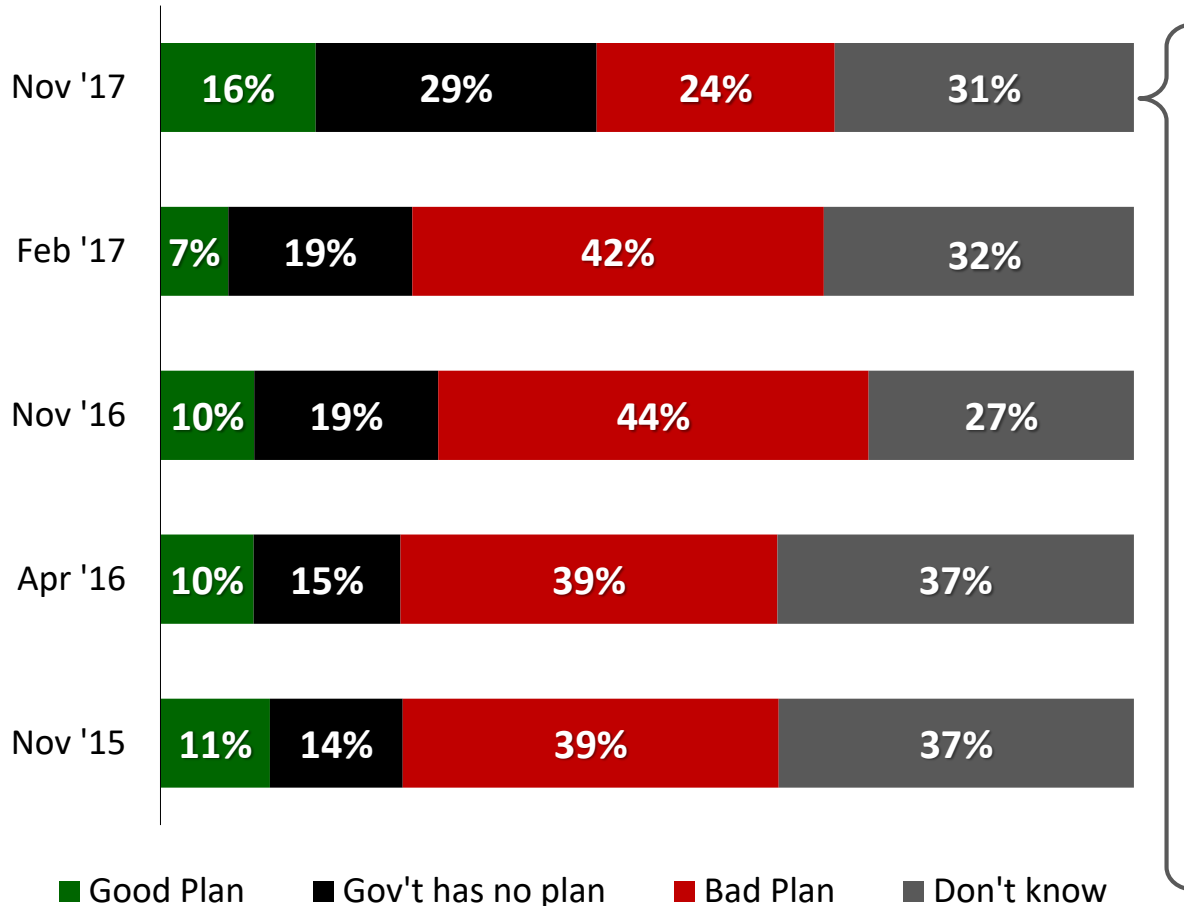


From what you have read, seen or heard, would you say the provincial government's plan for electricity is a good plan, a bad plan, do you not know enough to say or would you say it really does not have a plan?

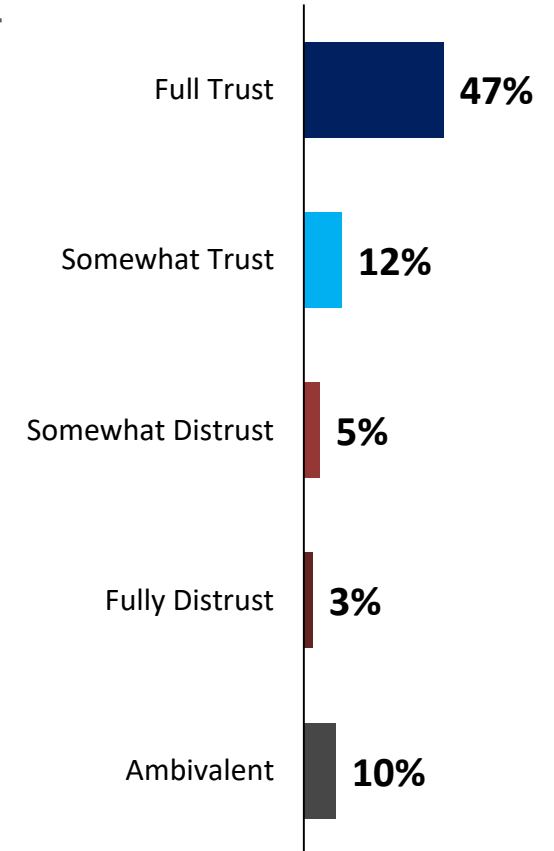
[asked of all respondents; Ontario; n=1,000]

Sample Breakdown ▶▶

Those who say "Gov't has a good plan"

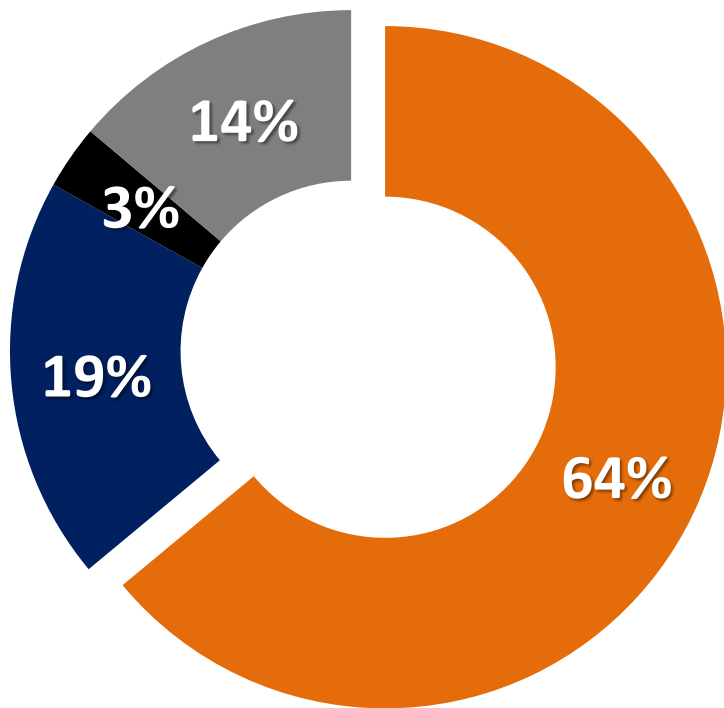


Industry Trust Index



Public Accountability: 2-in-3 (64%) think energy sector needs more accountability; industry trust a key difference

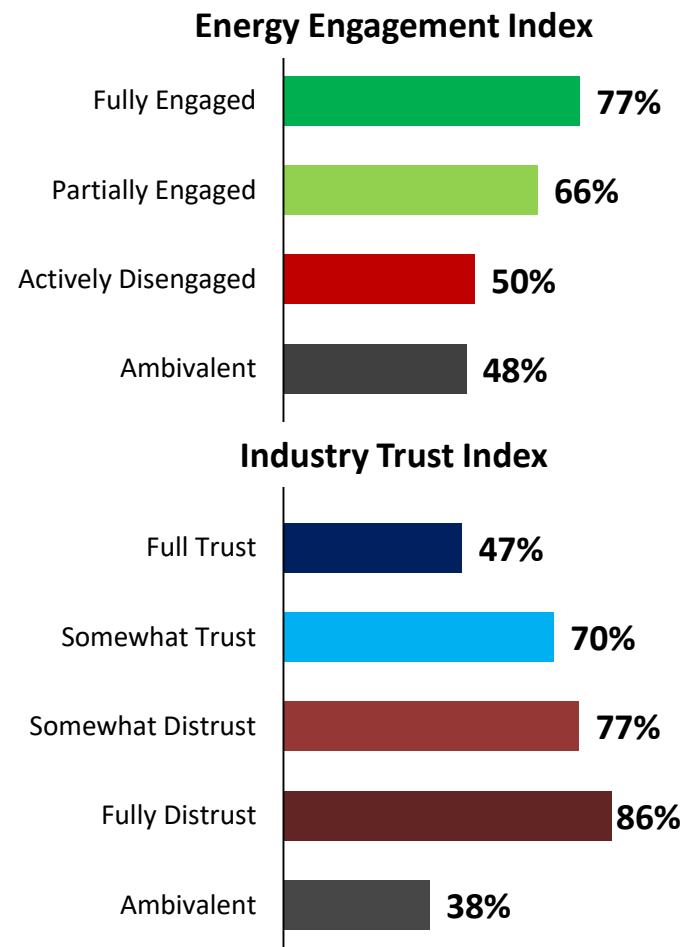
Q Do you feel there is a need for more or less public accountability in the energy sector?
[asked of all respondents; Ontario; n=1,000]



- Need more accountability
- Just enough
- Need less accountability
- Don't know

Sample Breakdown ▶▶

Those who say "Need more accountability"



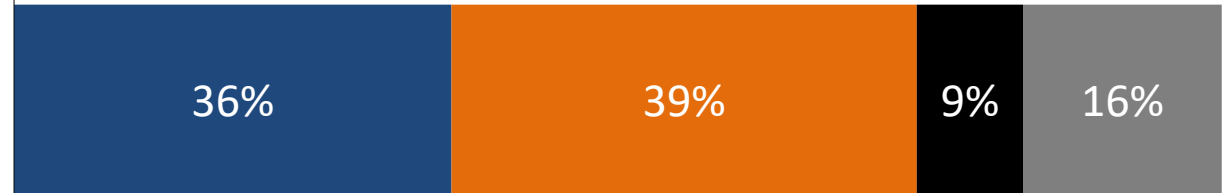
Who Should be in Charge of Processes? Plurality think regulators, not government, should lead planning

Q

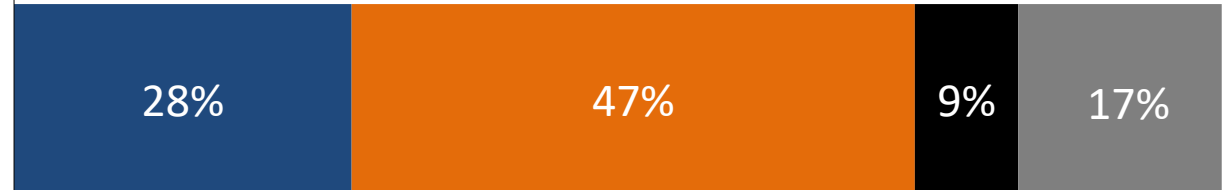
Every province sets long-term goals for the energy system, and puts plans in place to implement those goals. These processes can be either taken by the government or by energy regulators at arm's-length from the government (ROTATE). For each of the following process, do you think (ROTATE) the government OR energy regulators should be in charge?

[asked of all respondents; Ontario; n=1,000]

Setting long-term goals for the energy system



Putting plans in place to implement those goals



■ The government

■ The energy regulators

■ None of them

■ Don't know

Ways to Create More Accountability: support for all ways except increasing powers of politicians

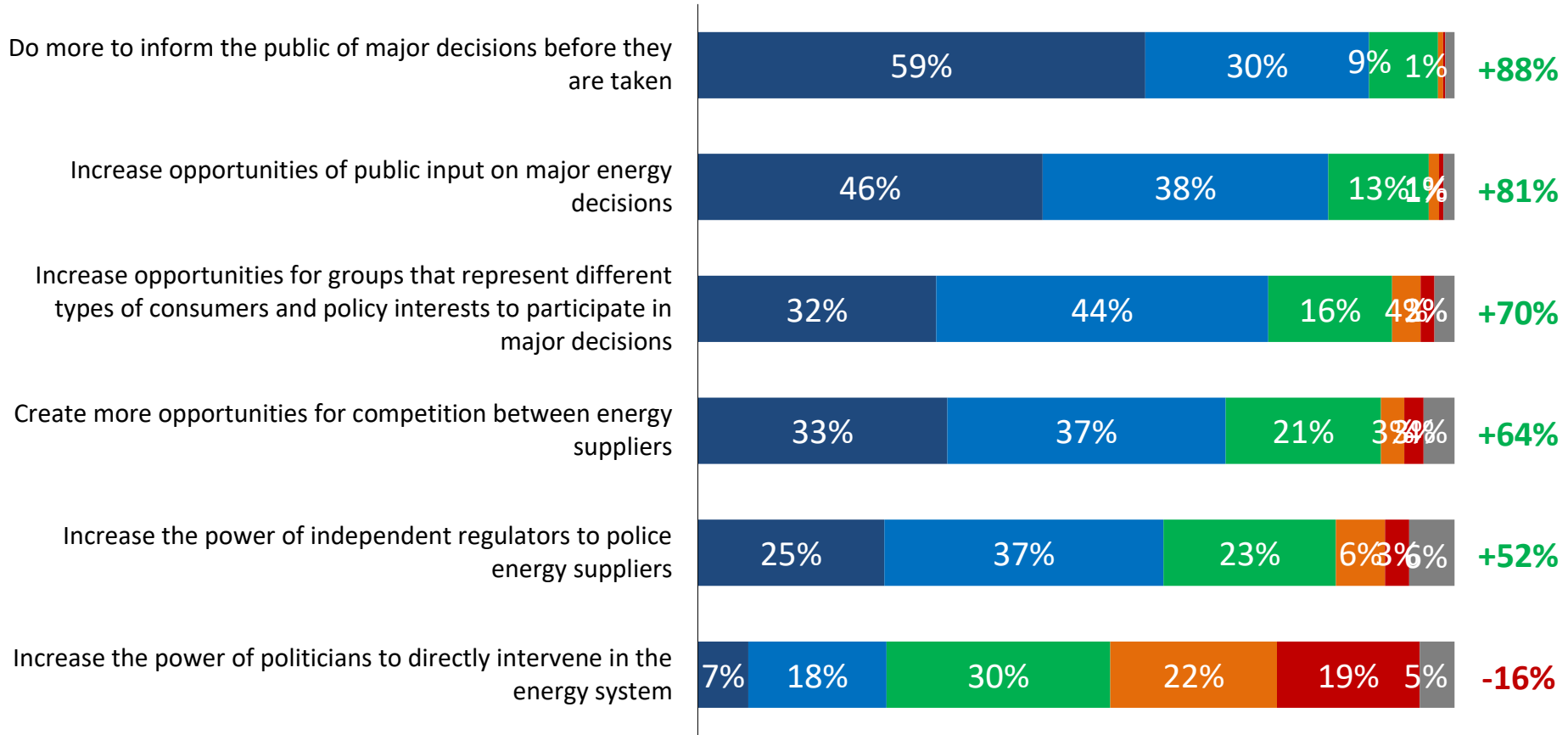


Would you support or oppose the following ways to create more accountability?

[asked of those who feel more accountability is needed in the energy sector; Ontario; n=640]

Net Support

(Total Support - Total Oppose)



- Strongly support
- Somewhat support
- Neutral
- Somewhat oppose
- Strongly oppose
- Don't know



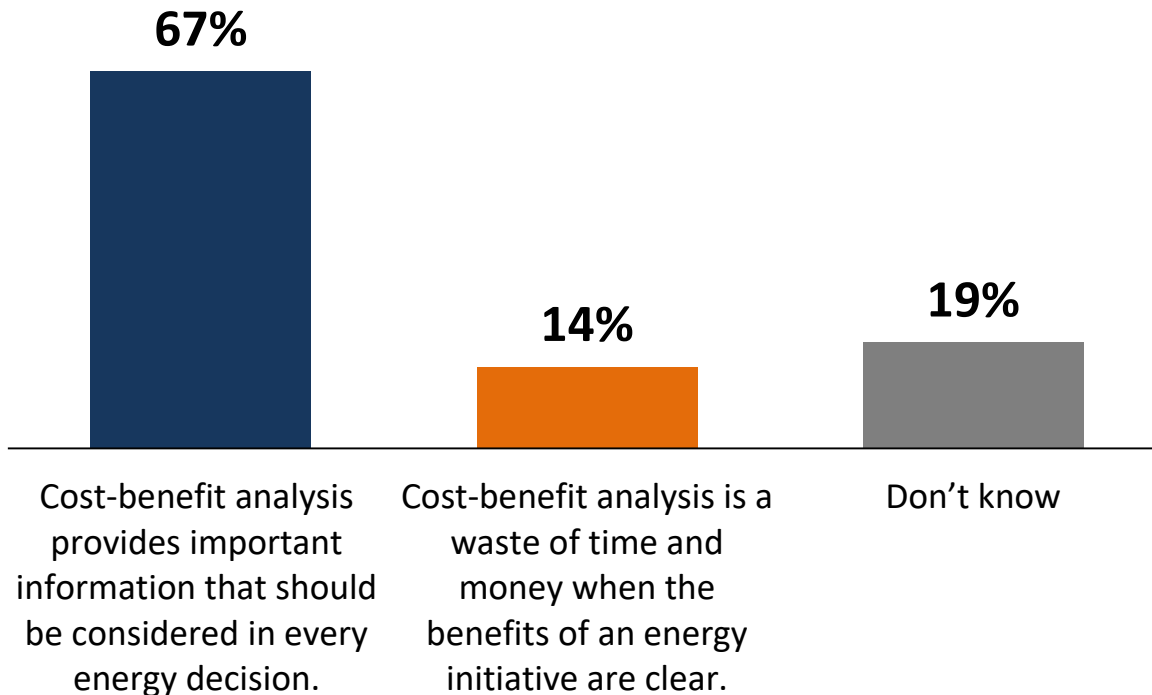
Benefits of Cost-Benefit Analysis: 2-in-3 (67%) feel cost-benefit analysis provides key information on decisions



There are many approaches government and energy regulators can take when making decisions about energy projects. The following questions are about various approaches commonly used today.

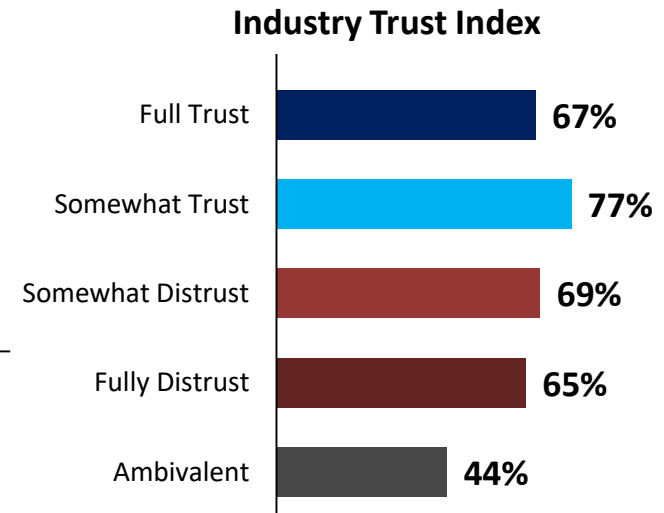
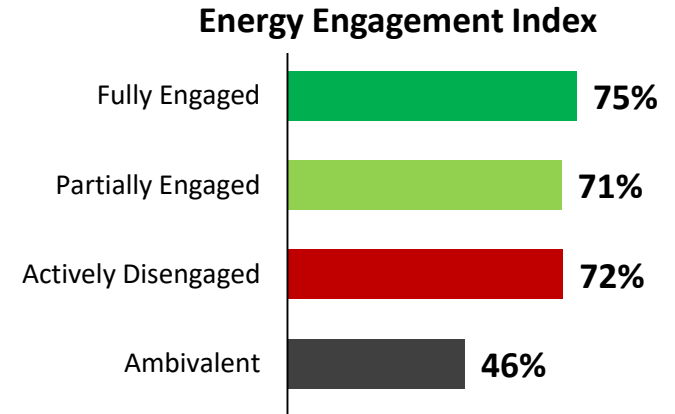
Cost-benefit analysis estimates the strengths and weaknesses of different options, and determine whether benefits outweigh costs. Which of the following statements is closest to your own view?

[asked of all respondents; Ontario; n=1,000]



Sample Breakdown ▶▶

Those who say "Provides important information"



Key Attitudes: majority feel regulators, as experts make better choices than politicians; rates are a key political factor

Q

Now we have some questions for you about the role of the energy regulators, the provincial government, and people like you can play in the energy sector. Below is a list of statements about how some people feel towards them. For each of the statements, please indicate how strongly do you agree or disagree.

[asked of all respondents; Ontario; n=1,000]

Net Agreement

(Total Agree
Total Disagree)

Energy regulators make better choices than politicians because they are the experts in the industry and know the system best.



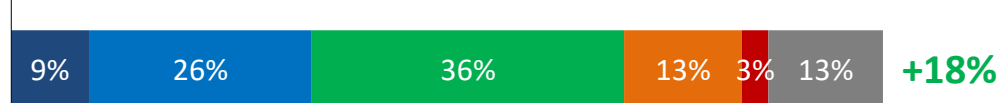
Energy regulators are more likely to make better policy choices in the long run than politicians.



Elections make government more responsive to public concerns than energy regulators.



Energy regulators can get too close to the energy industry and are more likely than politicians to make decisions against the public interest.



I don't care about the details of how decisions about energy are made, as long as my electricity rates are as low as possible.



If my electricity rates increase to an unacceptable level, I will simply vote the government out in the next election.



■ Strongly agree

■ Somewhat disagree

■ Somewhat agree

■ Strongly disagree

■ Neither agree nor disagree

■ Don't know

Appendix:

Detailed Methodologies

Poll 1: Methodology (Online: Values & Politics)

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from October 26th to November 8th, 2017.
- This online survey of 846 adult Ontarians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional sample from Survey Sampling International, a leading provider of online sample. The results are weighted to n=500 based on the most recent Census data from Statistics Canada.
- The sample is drawn from a Canada wide survey of N=2,777 conducted on the same dates.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, and region characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
- This is a representative sample. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.

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Poll 2: Methodology (Online: Infrastructure and Electricity)

- These are the findings of another Innovative Research Group (INNOVATIVE) poll, this one conducted from November 10th to November 16th, 2017.
- This online survey of 1,406 adult Ontarians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional sample from Survey Sampling International, a leading provider of online sample. The results are weighted to n=1,000 based on the most recent Census data from Statistics Canada.
- The sample is drawn from a Canada wide survey of N=2,590 conducted on the same dates. National data shown by region is weighted to N=1,500 based on the most recent Census data.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, and region characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
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Poll 3: Methodology (Telephone: Provincial Politics)

- This survey was conducted by telephone among 607 randomly-selected Ontario residents, 18 years of age and older, from November 9th to November 17th, 2017.
- Only one respondent per household was eligible to complete this survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.
- The sample has been weighted (n=600) by age, gender and region using the latest available Census data to reflect the actual demographic composition of the population.
- This survey is compared with previous studies since April 2000. Prior to April 2003, approximately 650 Ontario adults were randomly selected. Since April 2003, approximately 600 adults are surveyed.
- The margin of error is approximately +4.0 (before April 2003: approximately +3.84)
- For tracking data, results are always weighted based on the most recent available census data.
- In the analysis, net impression or satisfaction refers to the two "positive" measures (i.e. "excellent" and "good") minus the two "negative" measures ("fair" or "poor") to create a single number. If there is a neutral measure ("made no difference"), it is not included in the calculation.

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For more information, please contact:

Greg Lyle

President

(t) 416-642-6429

(e) glyle@innovativeresearch.ca