

Public Opinion Research

Energy in Transition

Ontario Energy Network

Toronto | June 15, 2018

Methodology:



These are the results of several surveys that were conducted prior to and during the campaign, as well as immediately following the Ontario election.



While most of the results come from a series of online surveys, where appropriate we have also included the results of our ongoing monthly telephone surveys of 600 Ontario adults.

In all of these surveys, respondents are adult (18+) residents of Ontario who are eligible to vote. All samples are weighted by *age*, *region*, and *gender* to reflect the actual demographic composition of the adult population residing in Ontario [Statscan Census 2016].

Confidence

Please note that the Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels as they are not random probability samples.

The margin of error on our monthly telephone surveys is $\pm 4\%$, 19 times out of 20.

Does the Public Act Like Energy Consumers?

Shifting Energy Sources: 1-in-5 have already taken steps to switch energy sources; among those who haven't, 47% say they're likely to

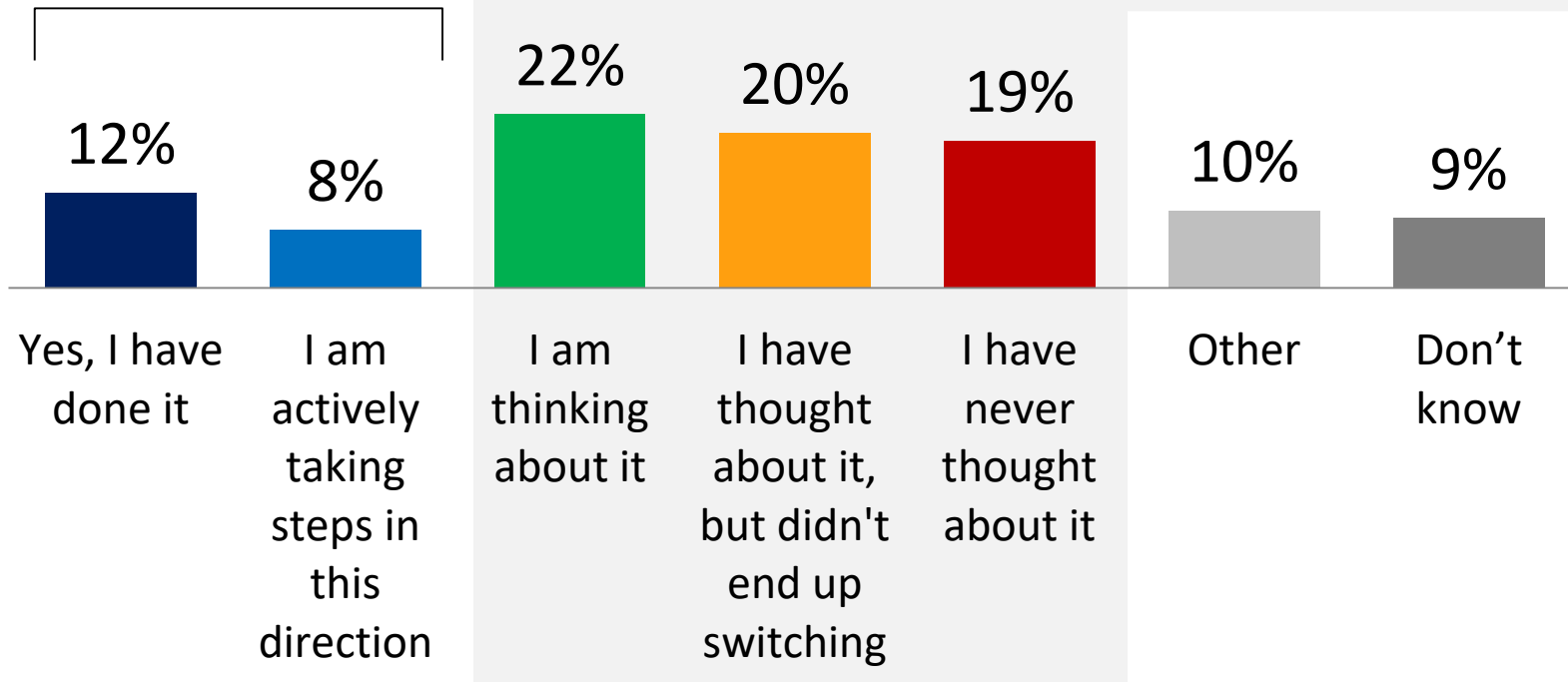


When you think about all your energy bills, have you ever considered shifting from one energy source to another to save money or reduce your impact on the environment? For example, changing from an electric dryer to a gas dryer, or from a gas-fuelled personal vehicle to an electric vehicle.

[asked of all respondents; n=600]

20%

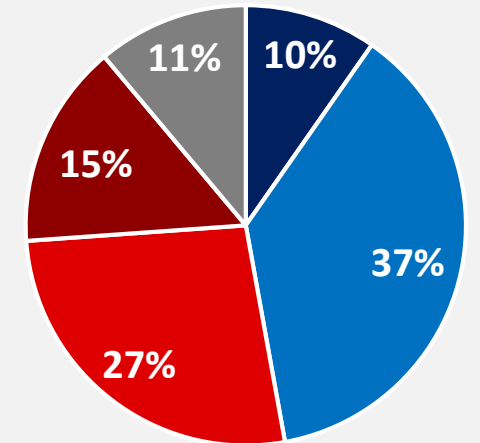
Have at least actively taken steps to switch between energy sources



Among those who **haven't taken steps to switch**:

How likely would you be to consider shifting from one energy source to another in the future?

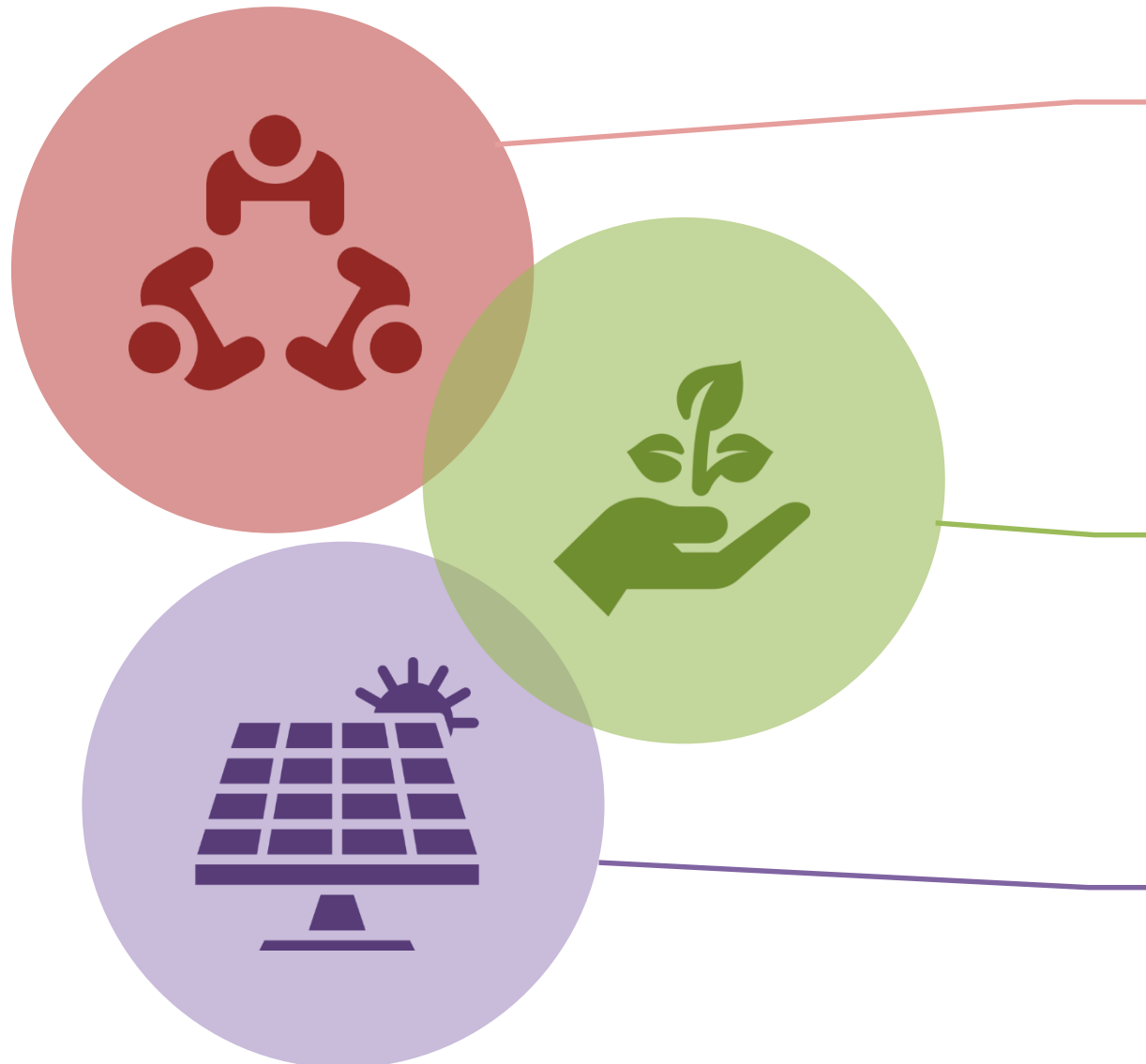
[n=364]



- Very likely
- Somewhat likely
- Not very likely
- Not likely at all
- Don't know

Dealing with Energy in a Changing World

Circles of Engagement: There are three different ways in which consumers are actively engaged in their energy consumption



Community Decision Making

How engaged are consumers in the political landscape around matters relating to energy?

Conservation

How engaged are consumers in energy conservation?

Prosumer Energy Management

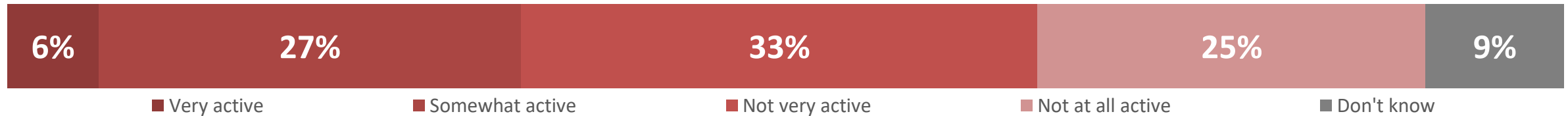
How engaged are consumers in taking their energy consumption into their own hands?

How likely are people to get involved?

Community Decision-Making

How actively involved do you like to be in community decision-making about our energy system?

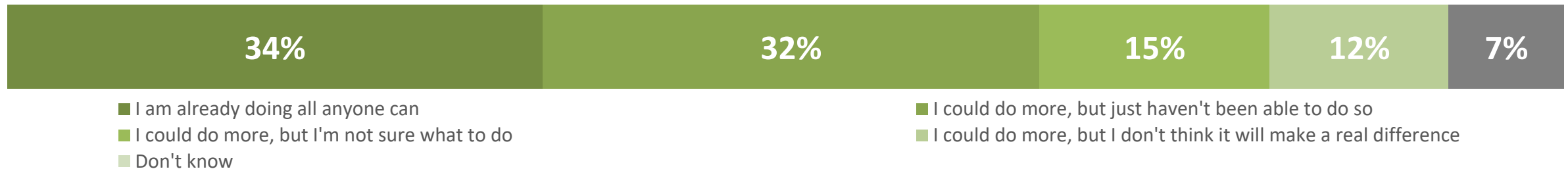
[asked of all respondents; n=600]



Conservation

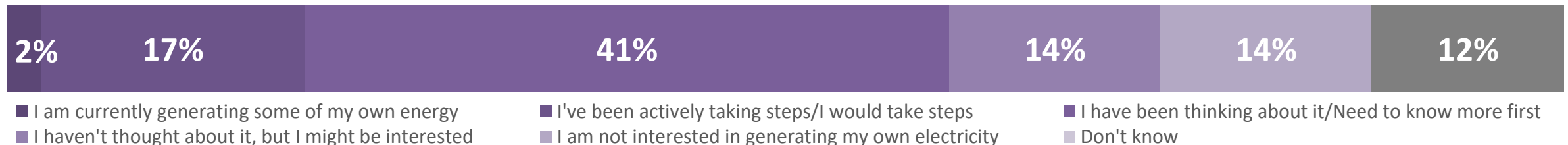
When it comes to electricity conservation, which of the following statements best represents your point of view?

[asked of all respondents; n=600]

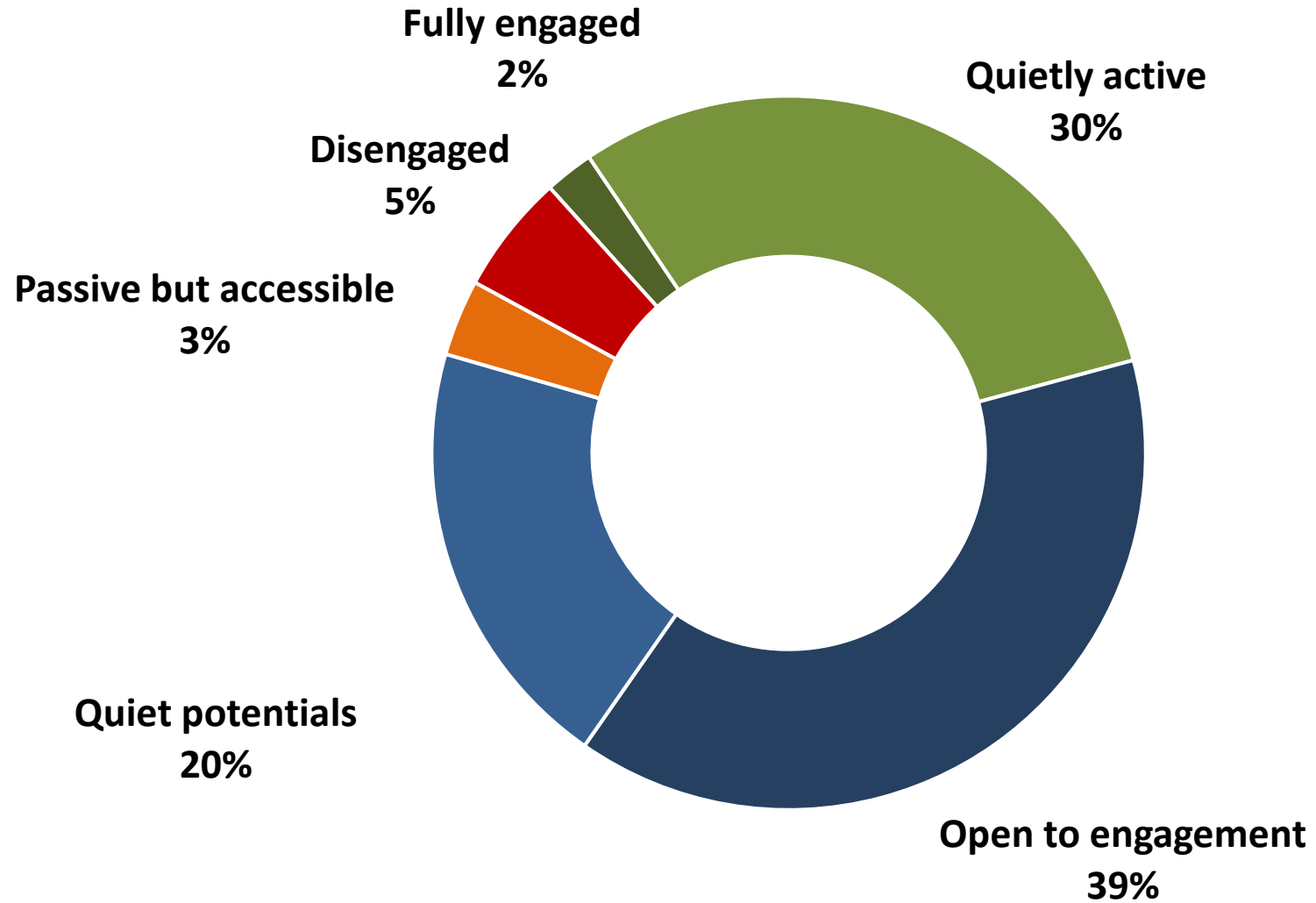


Prosumer Energy Management

How would you describe your interest in generating energy yourself/If, in the future, your housing situation would allow you to do it, how interested would you be in generating energy yourself? [asked of all respondents; n=600]



Energy interests most people, but not at the top of their to do list



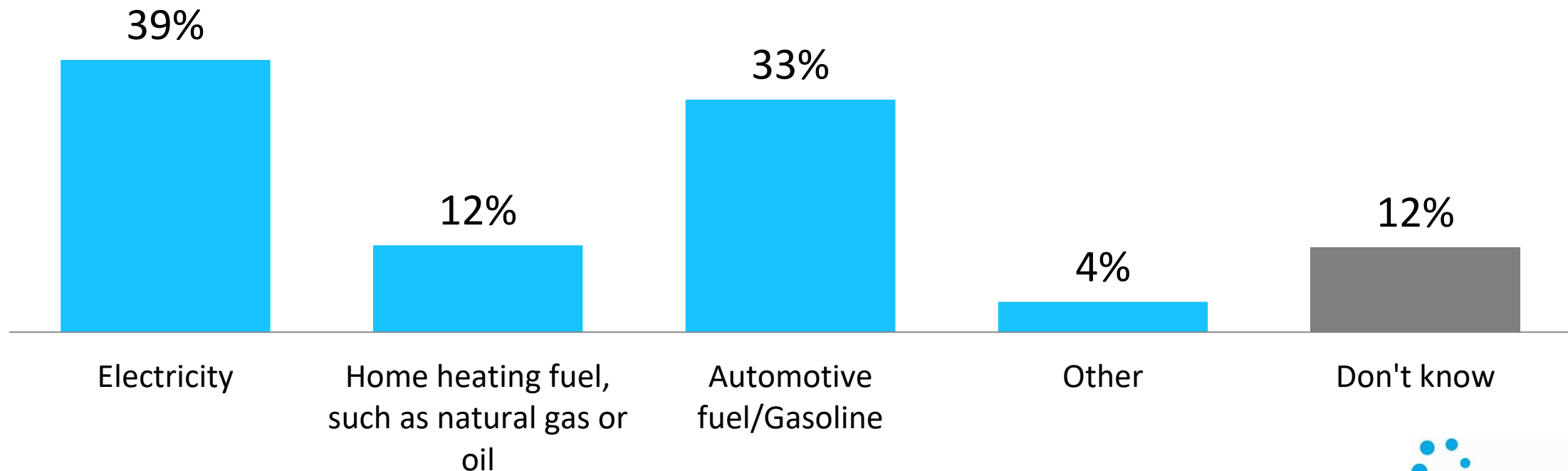
Energy as a Pocket Book Issue

Overall Energy Consumption Costs: 4-in-10 say their electricity bill makes up the biggest share of their overall energy consumption costs



Thinking about your overall energy consumption costs, including your electricity bill, the cost for home heating fuel or automotive fuel, what makes up the biggest share of your expenses?

[asked of all respondents; n=600]

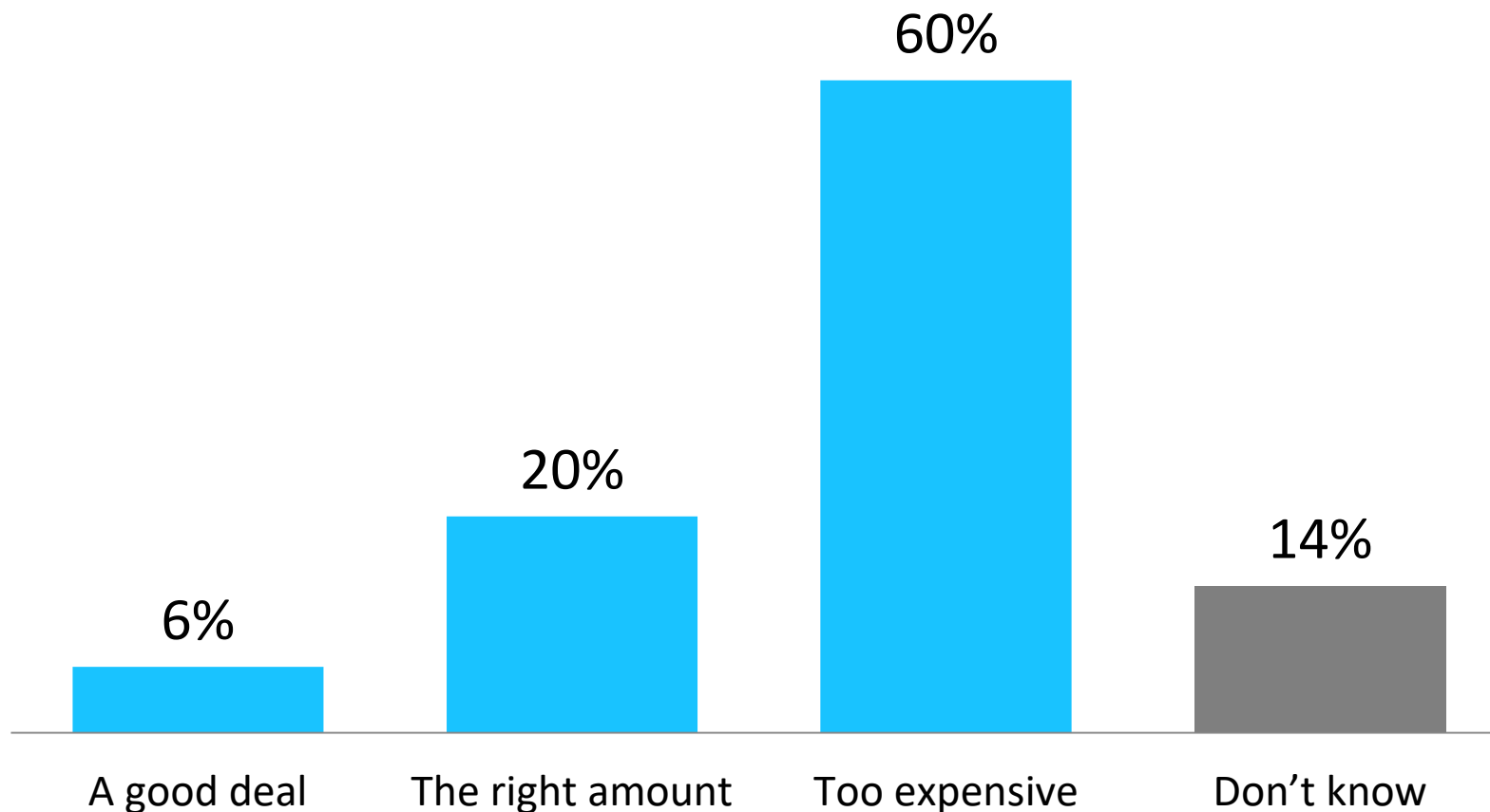


Fairness of Price: Majority of Ontarians find electricity to be too expensive; highest amongst Struggler segments



Thinking about how much you pay for electricity today, do you think the price you are paying is a good deal, too expensive, or about the right amount?

[asked of all respondents; n=600]



Segmentation ▶▶

Those who said *too expensive*:

Achievers/
Hopefuls **50%**

Moderate
Strugglers **74%**

Heavy
Strugglers **76%**

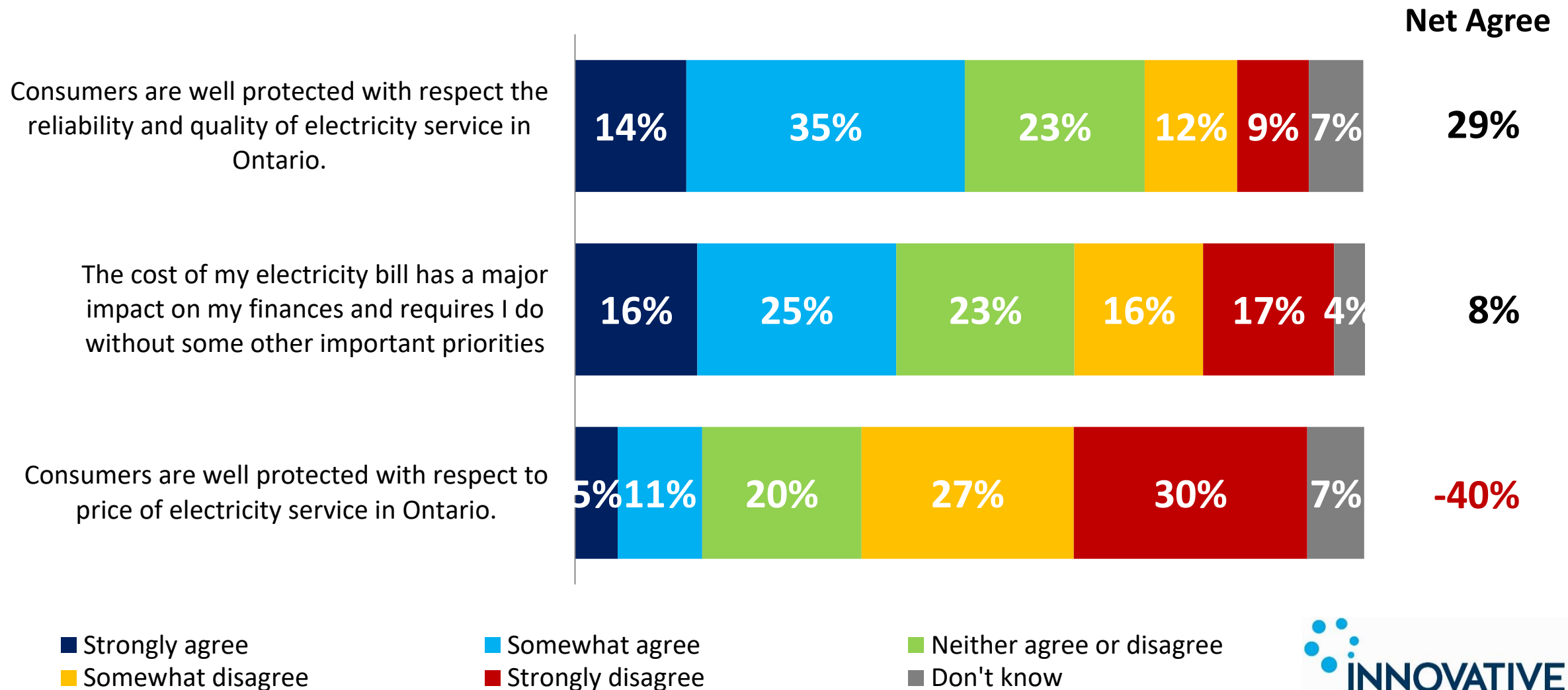
Alienated/
Ambivalent **59%**

Consumer Attitudes: Reliability and quality – yes. But strong disagreement on price protection; bills have an impact on finances



Thinking about electricity, would you agree or disagree with the following statements?

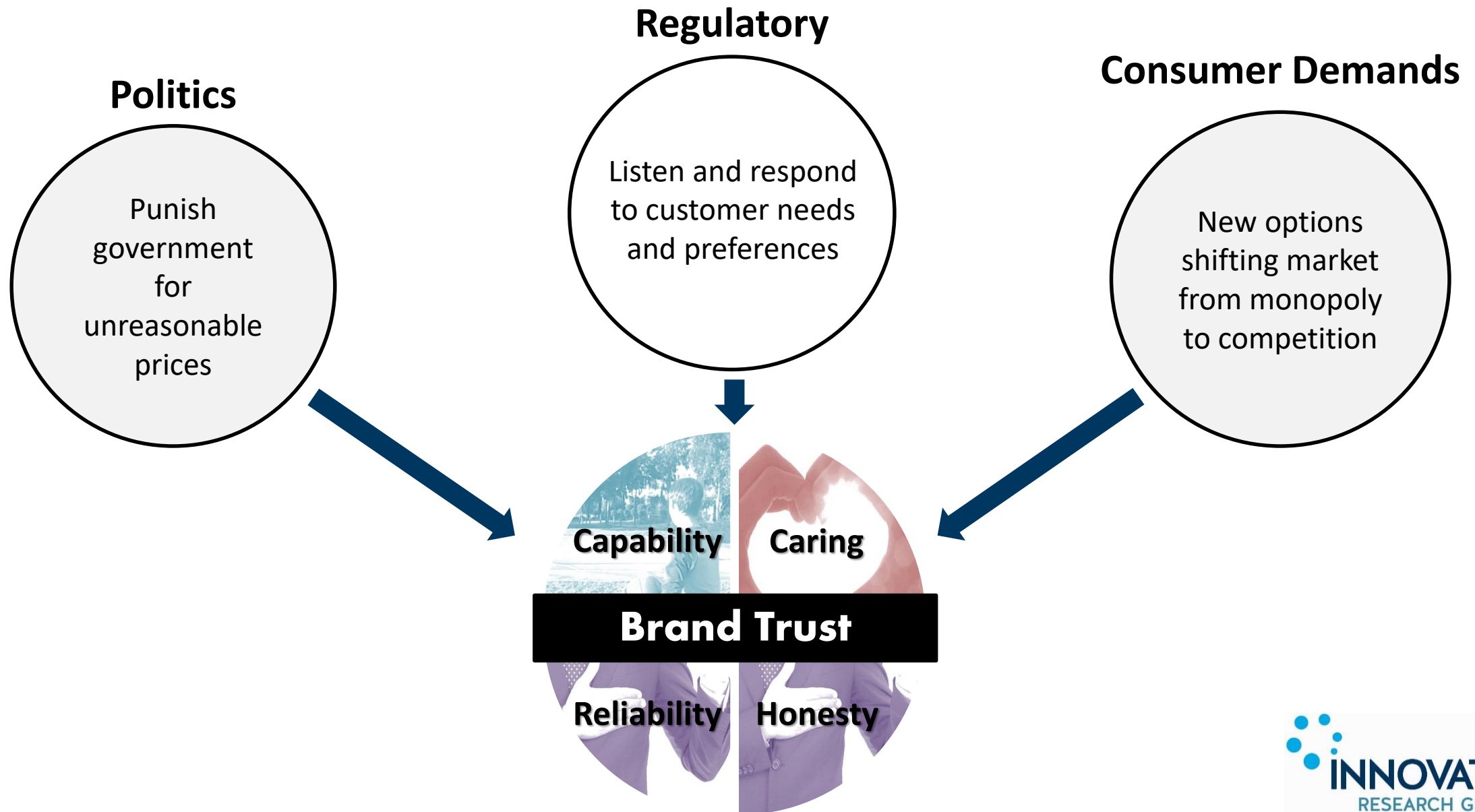
[asked of all respondents; n=600]



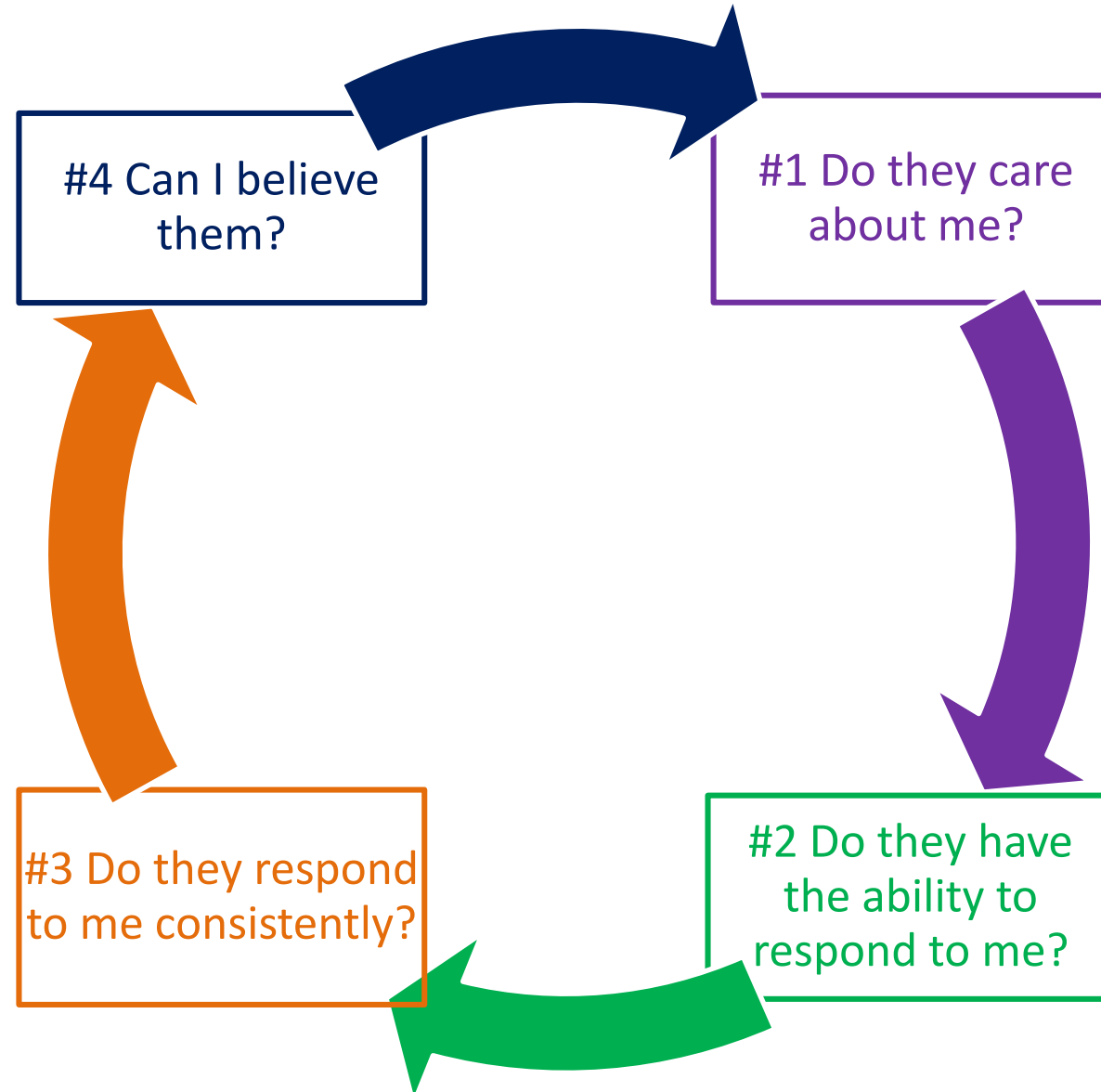
OEB response to this public skepticism

“Utilities are expected to develop a genuine understanding of their customers’ interests and preferences and reflect those interests and preferences in their business plans. Utilities are expected to demonstrate value for money by delivering genuine benefits to customers and by providing services in a manner which is responsive to customer preferences.”

All three pressures lead to a common response



Four buildings blocks to earn brand trust

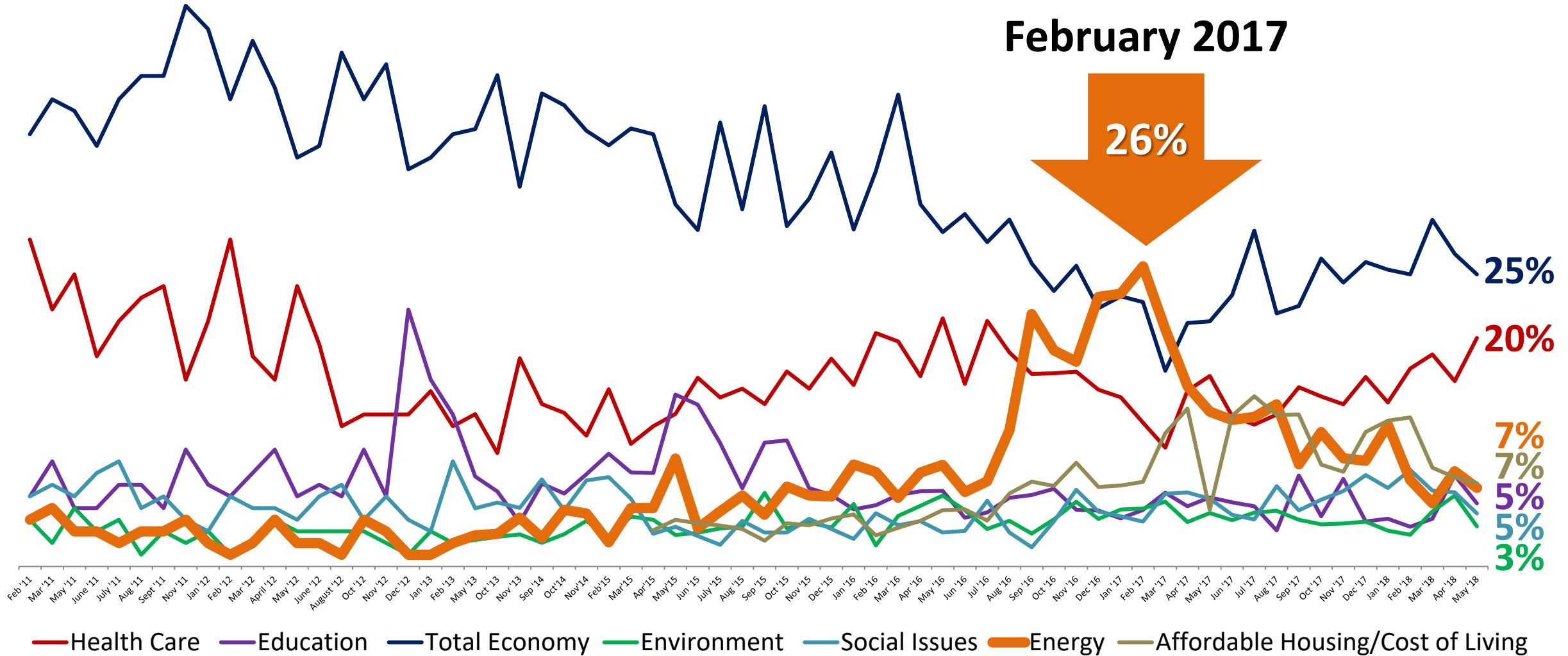


Energy Top of Mind Tracking: Energy is no longer the top concern that it was in February of last year



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

[asked of all respondents; n=600]

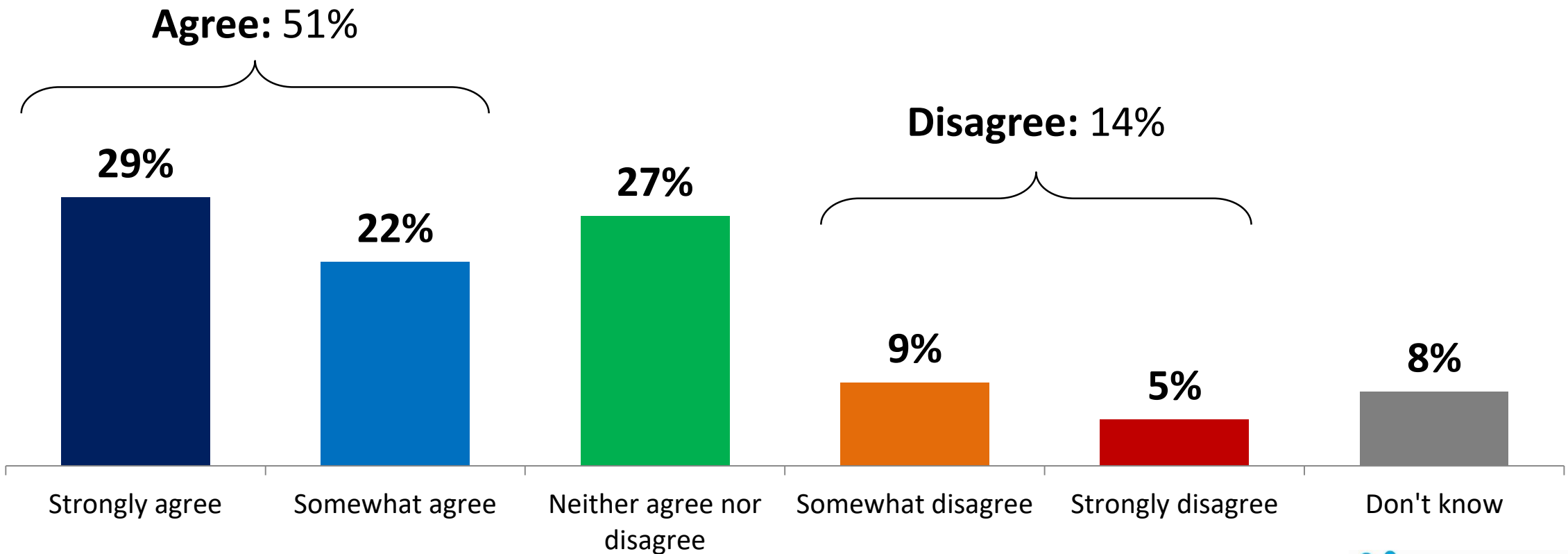


Political Fallout on Price: Half say they will vote the government out if electricity prices increase to an unacceptable level



Do you agree or disagree with the following statement? If my electricity rates increase to an unacceptable level, I will simply vote the government out at the next election.

[Ontario; n=1,000, November 2017]





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