

*Public Opinion Research ►►*

# The Changing Politics of Energy

**OEA SPEAKER SERIES**

**Toronto | October 30, 2018**



# Agenda

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**Doug Ford's Evolving Coalition**

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**The Electricity Mood in Ontario and Canada**

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**Canadians' Electricity Agenda**

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**Reactions to the Carbon Tax Plan**

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**Reactions to the Fair Hydro Plan**

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# Methodology

**Method:**

Representative online panel survey

**Sample Size:** Unweighted n=1,628, Weighted n=1,200

**Sample Frame**

General Population [18yrs+, Canadian citizens]

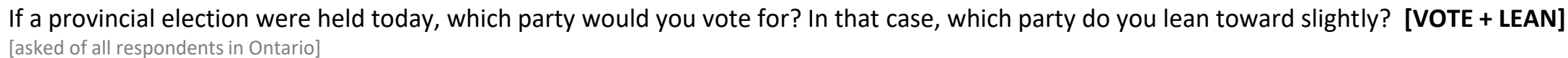
**Field Dates:** October 26<sup>th</sup>-28<sup>th</sup>, 2018

**Weighting**

Sample weighted by *age*, *region*, and *gender* to reflect the actual demographic composition of the adult population in Canada [Statscan Census 2016].

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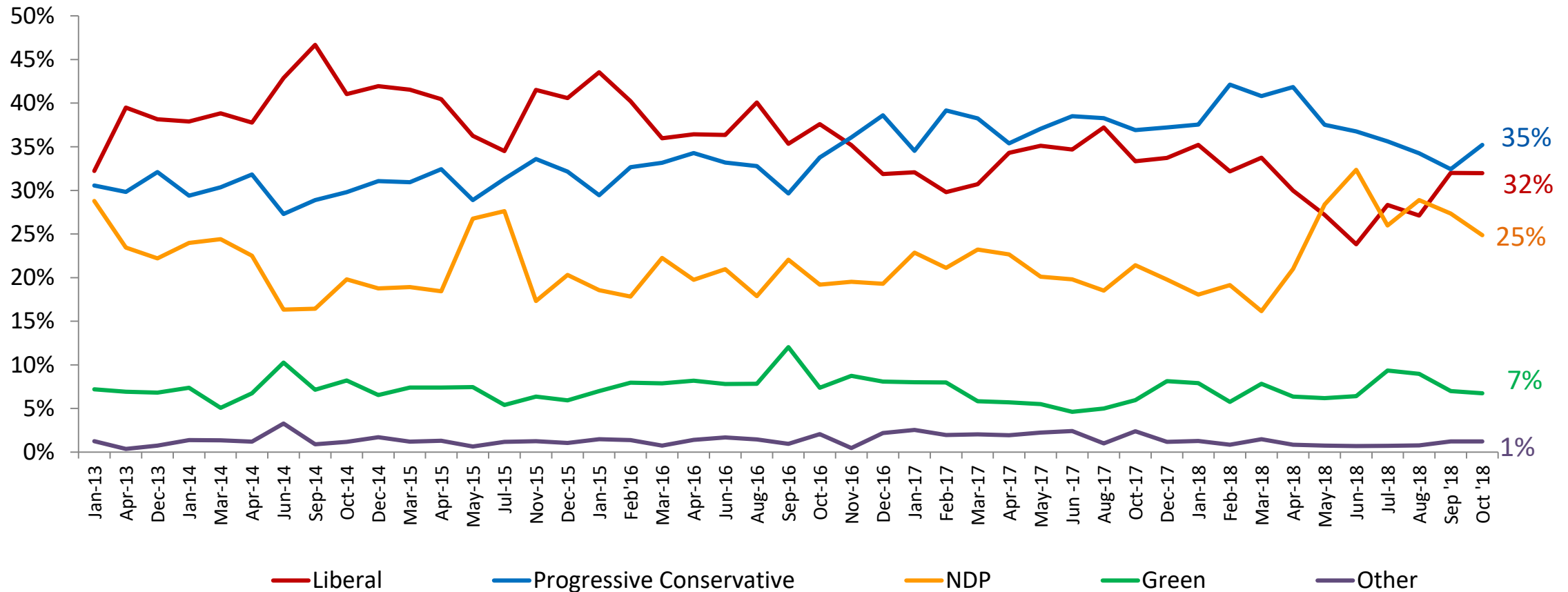
# How is the Ford PC coalition doing?



# Decided Vote Tracking: PCs (35%) lead Liberals (32%) among decided voters by a narrow margin



If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED VOTE]**  
[only decided voters]





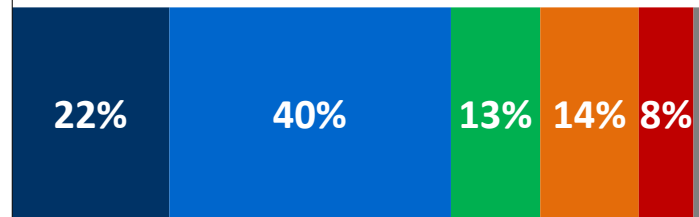
# Economic Alienation Segmentation: nearly 4-in-10 (37%) are either ambivalent or alienated



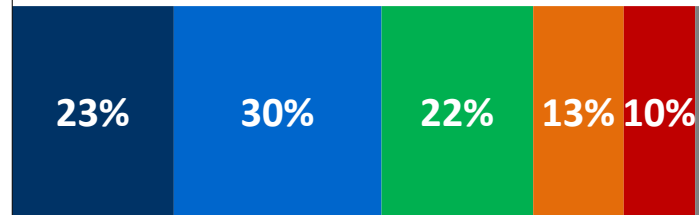
Do you agree or disagree with the following statements?

[n=600]

Here in Ontario, you can be anything if you are willing to work for it.



No matter how hard I work, every year it seems more difficult to get by



Strongly agree

Neither agree nor disagree

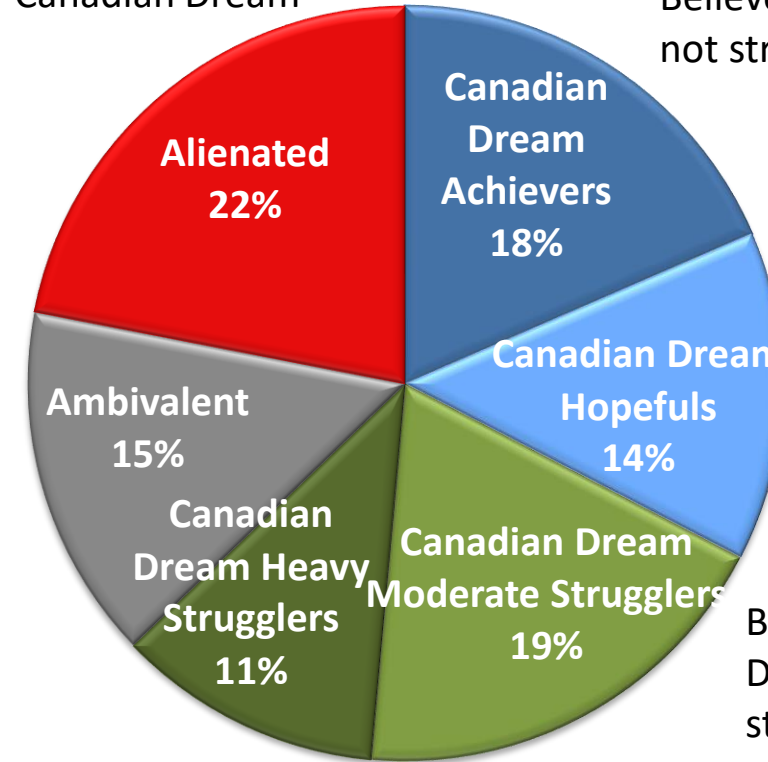
Strongly disagree

Somewhat agree

Somewhat disagree

Don't know

Don't believe in Canadian Dream



Believe in Canadian Dream, not struggling to get by

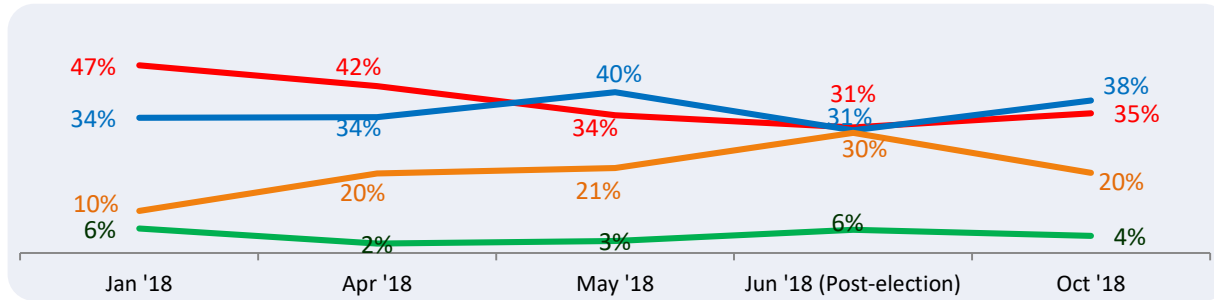
Believe in Canadian Dream, no opinion on "struggling to get by"

Believe in Canadian Dream, moderately struggling to get by

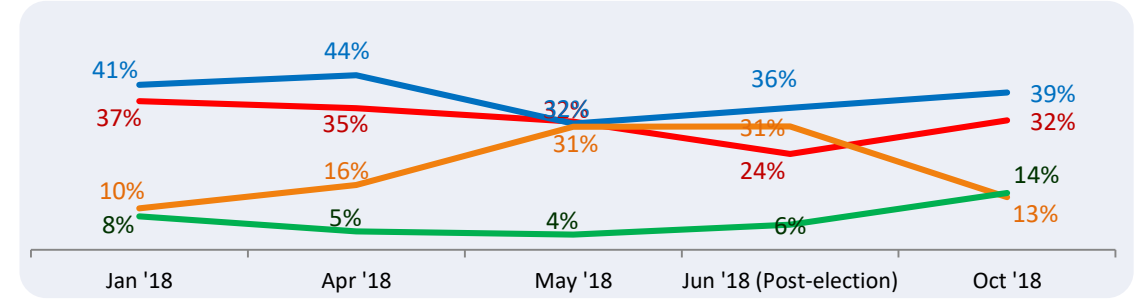
Believe in Canadian Dream, find it very difficult to get by

# Tracking Decided Vote by Alienation Segmentation: Liberals gaining with ambivalent and alienated groups; PCs holding onto Achievers

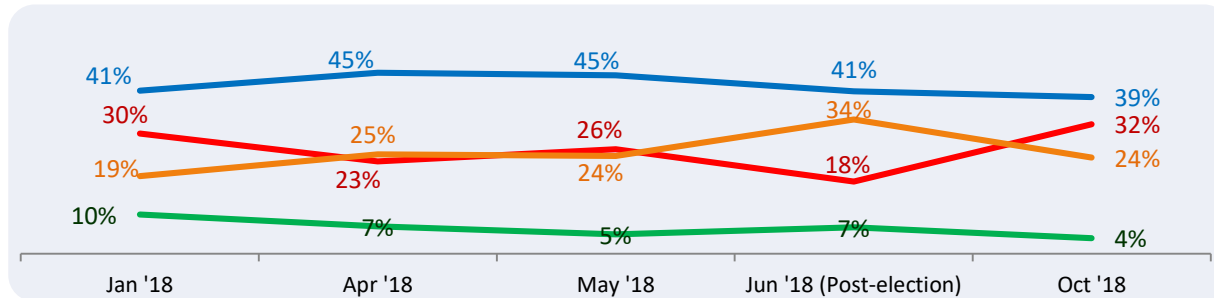
## Canadian Dream Achievers



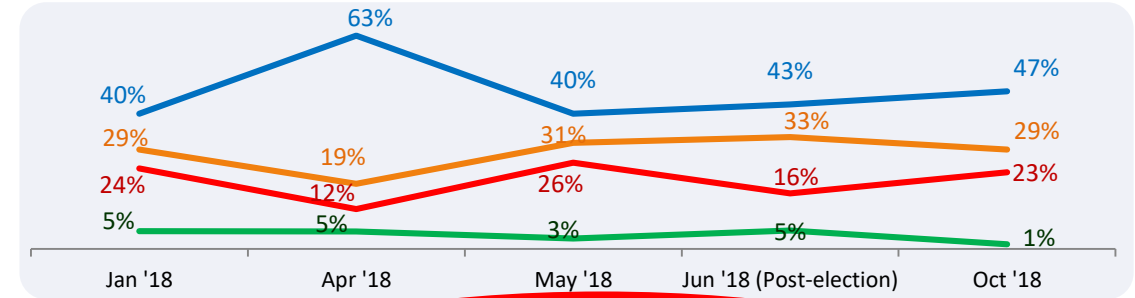
## Canadian Dream Hopefuls



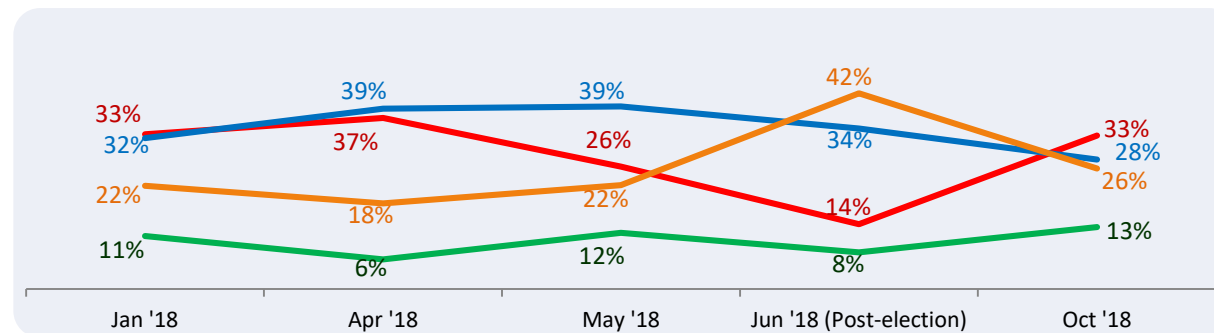
## Canadian Dream Moderate Strugglers



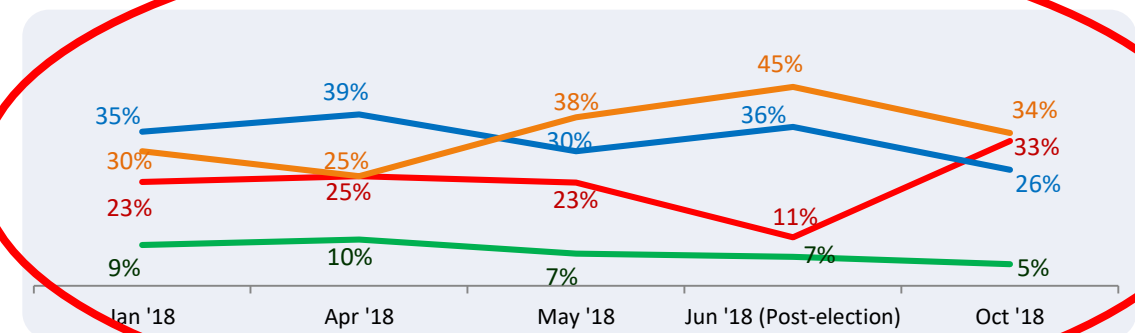
## Canadian Dream Heavy Strugglers



## Ambivalent



## Alienated



Decided vote: Liberal PC NDP Green

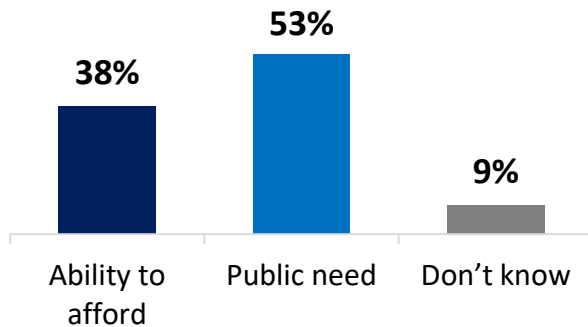


# Value Clusters: NDP limited by 32% saying redistribute, PCs limited by 38% saying spend according to means

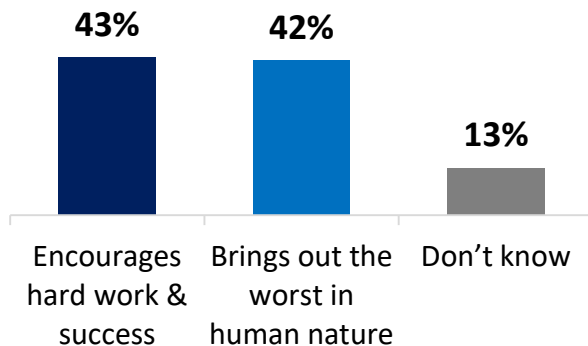


These clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

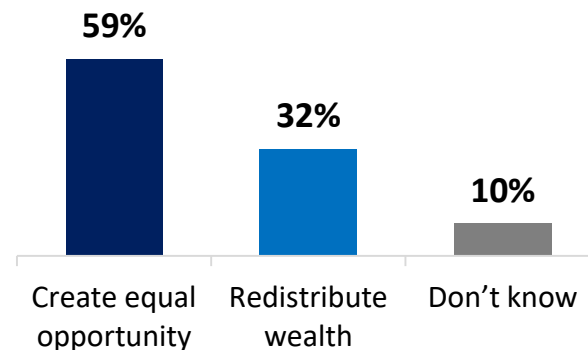
**Government should base spending decisions on...**



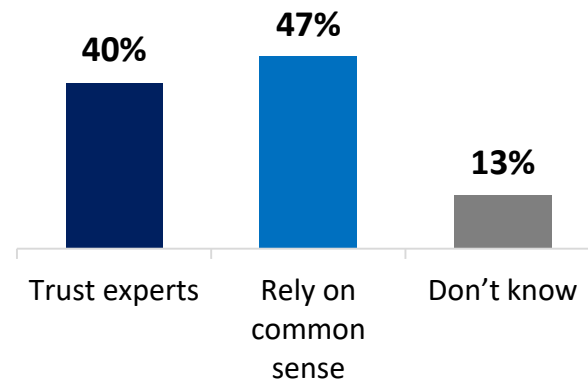
**The profit system...**



**Main role of government is to...**



**When it comes to government decision making...**



Deferential



Populist

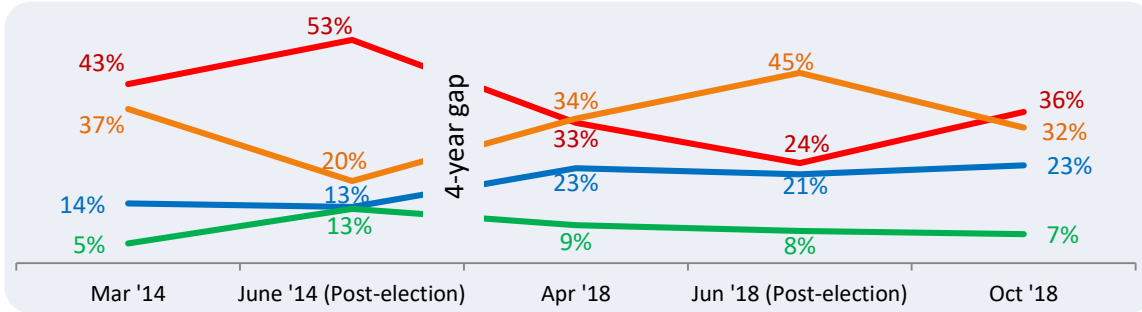


Left

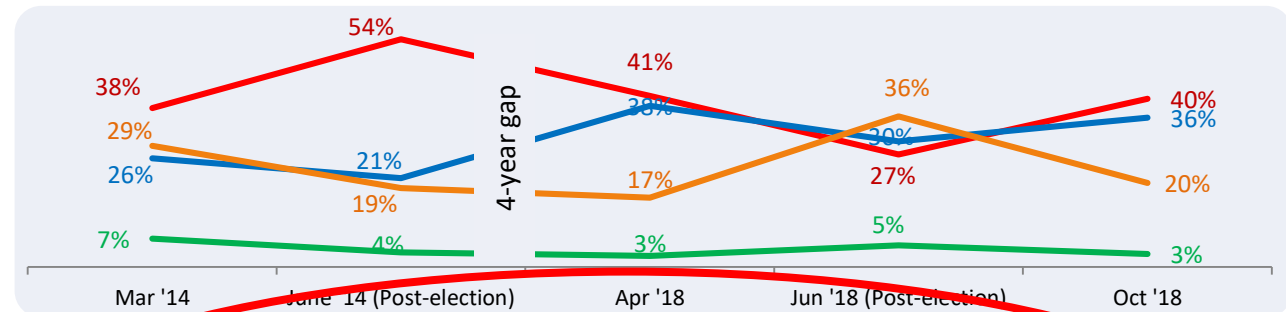
Right

# Tracking Decided Vote by Cluster: Liberals regaining support in some key groups; PCs remain competitive with Business Liberals

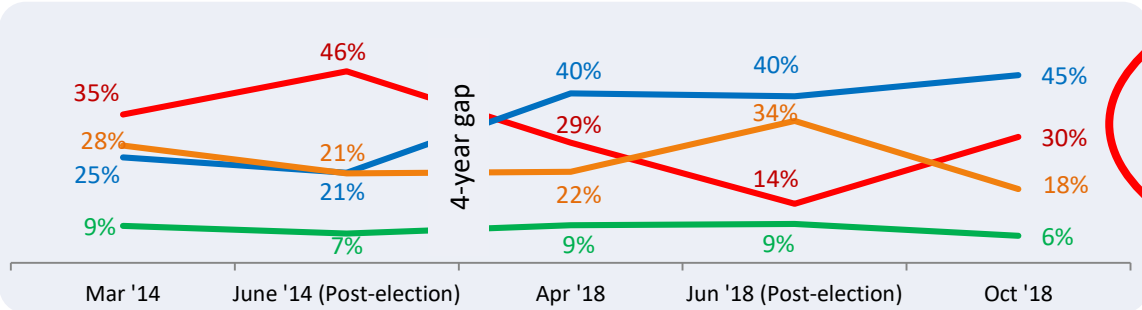
## Left Liberals



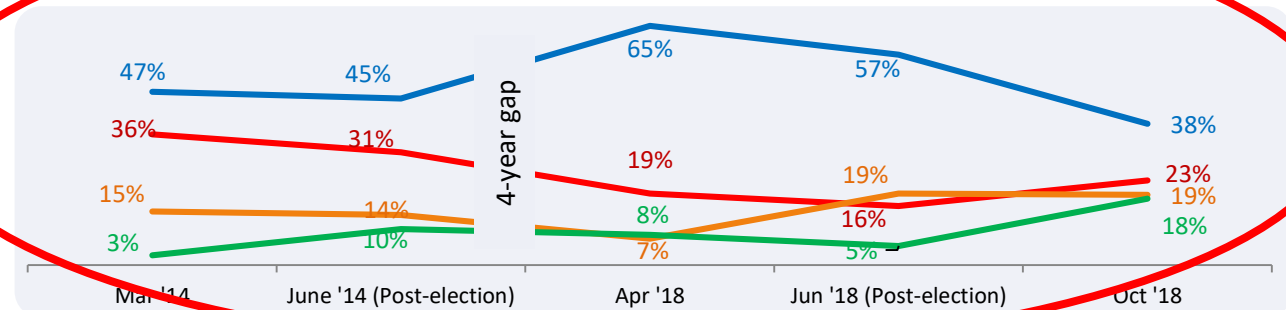
## Business Liberals



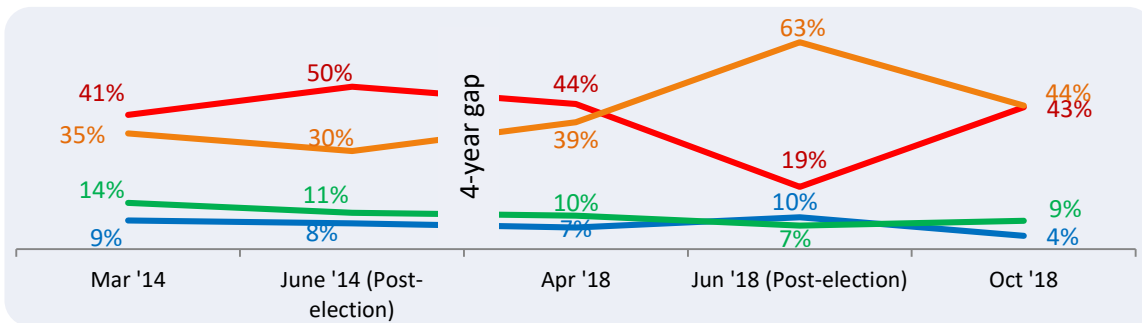
## Thrifty Moderates



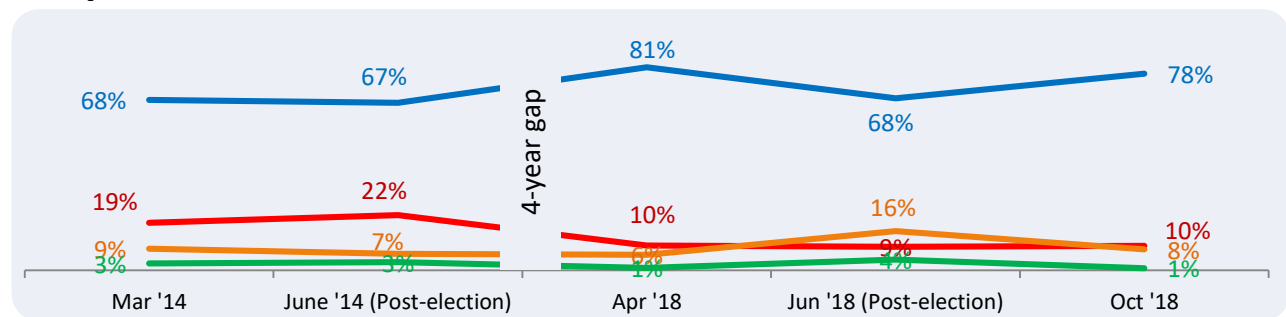
## Deferential Conservatives



## Core Left



## Populist Conservatives



Decided vote: Liberal PC NDP Green

# Electricity Agenda

## October 2018 CTM

# Ontarians feel less protected on price than any other province. Only 1-in-5 (22%) feel consumers here are well protected on price.

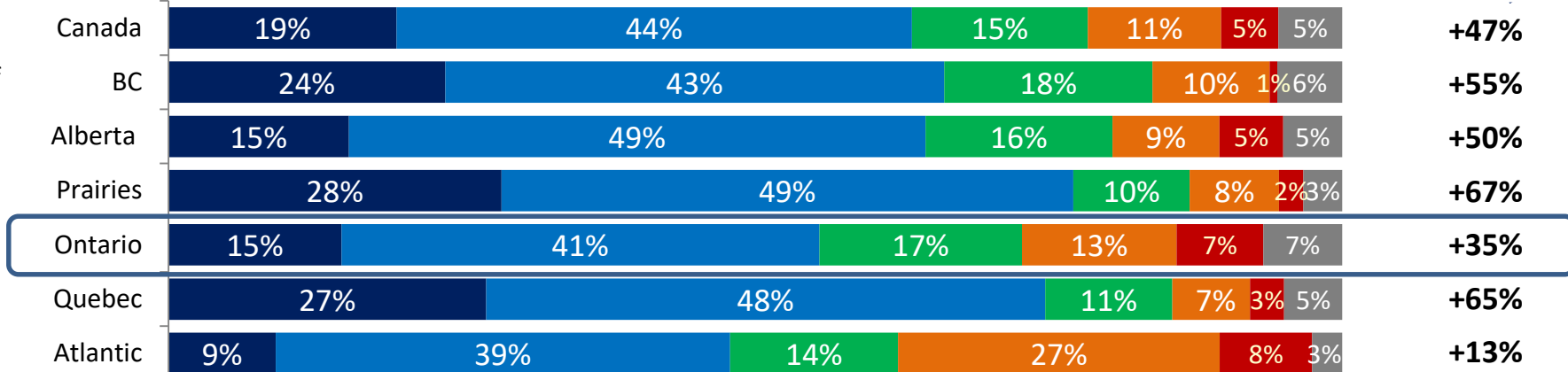
Q

Thinking about the electricity companies in your province, would you agree or disagree with the following statements?

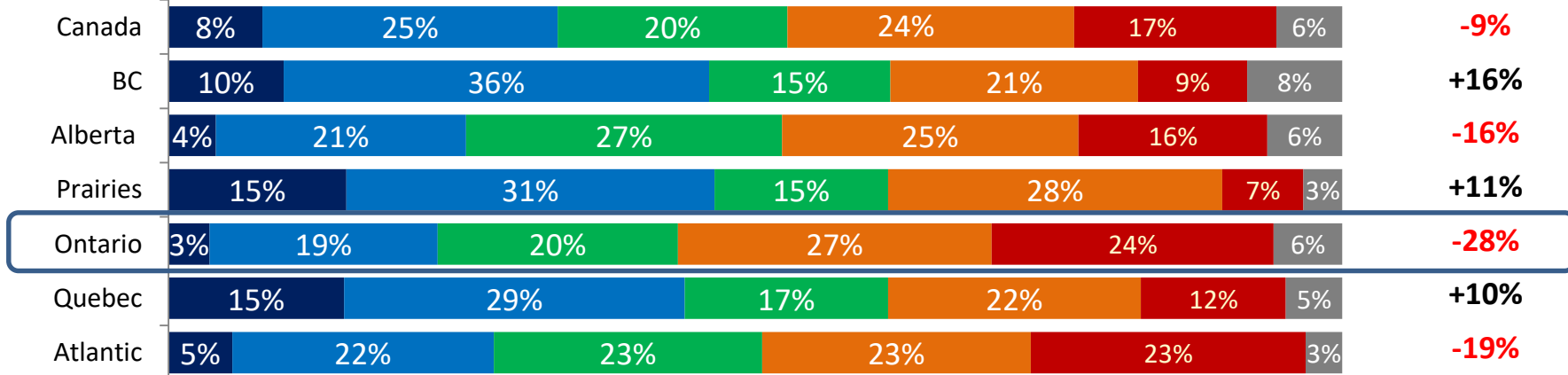
[asked of all respondents]

Net Agree

Consumers are well protected with respect to the reliability and quality of electricity service in my province.



Consumers are well protected with respect to the price of electricity service in my province.



Strongly agree

Somewhat agree

Neither agree nor disagree

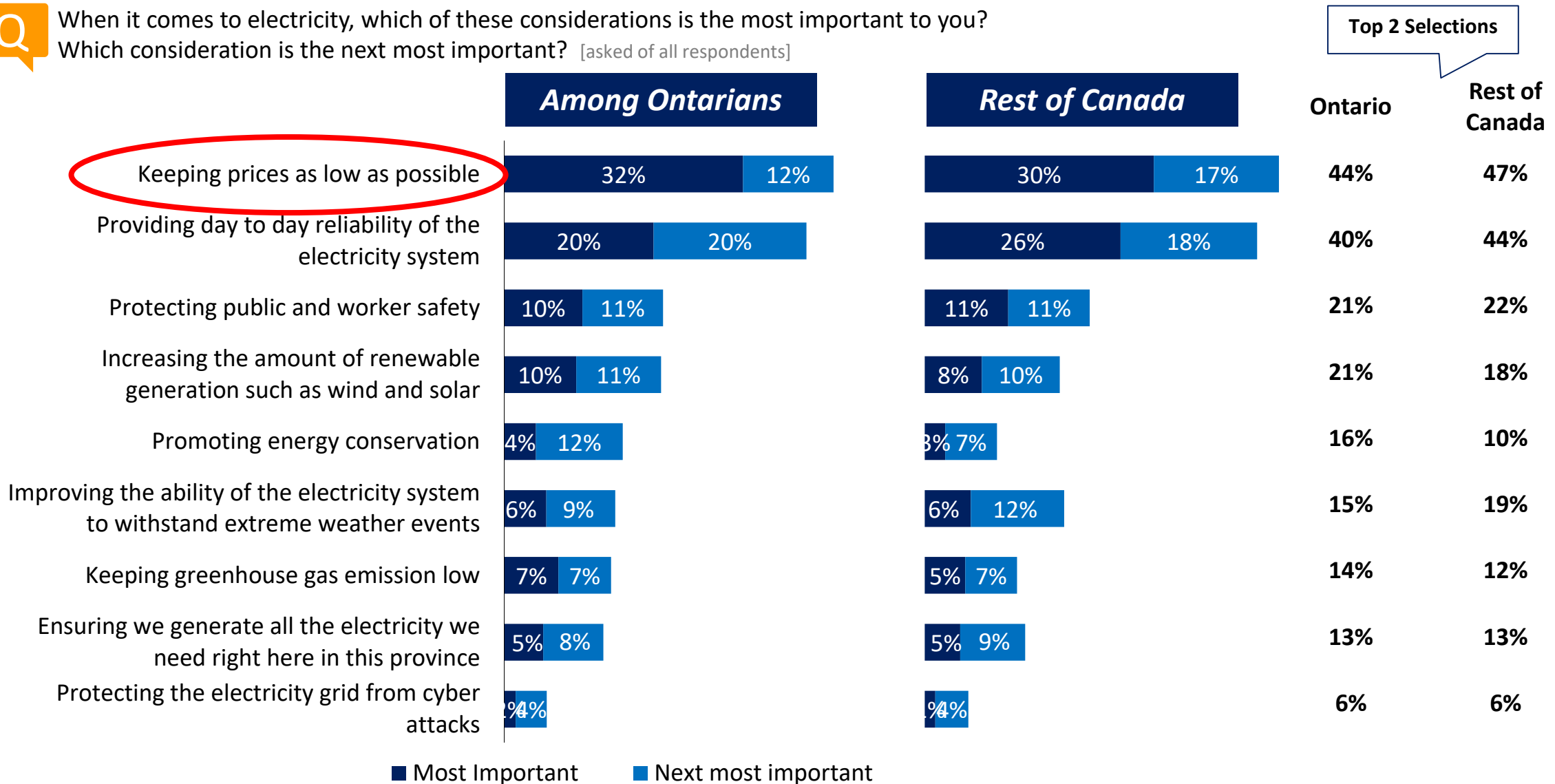
Somewhat disagree

Strongly disagree

Don't know

# Importance: Price leads among electricity priorities with reliability a strong second

**Q** When it comes to electricity, which of these considerations is the most important to you?  
Which consideration is the next most important? [asked of all respondents]



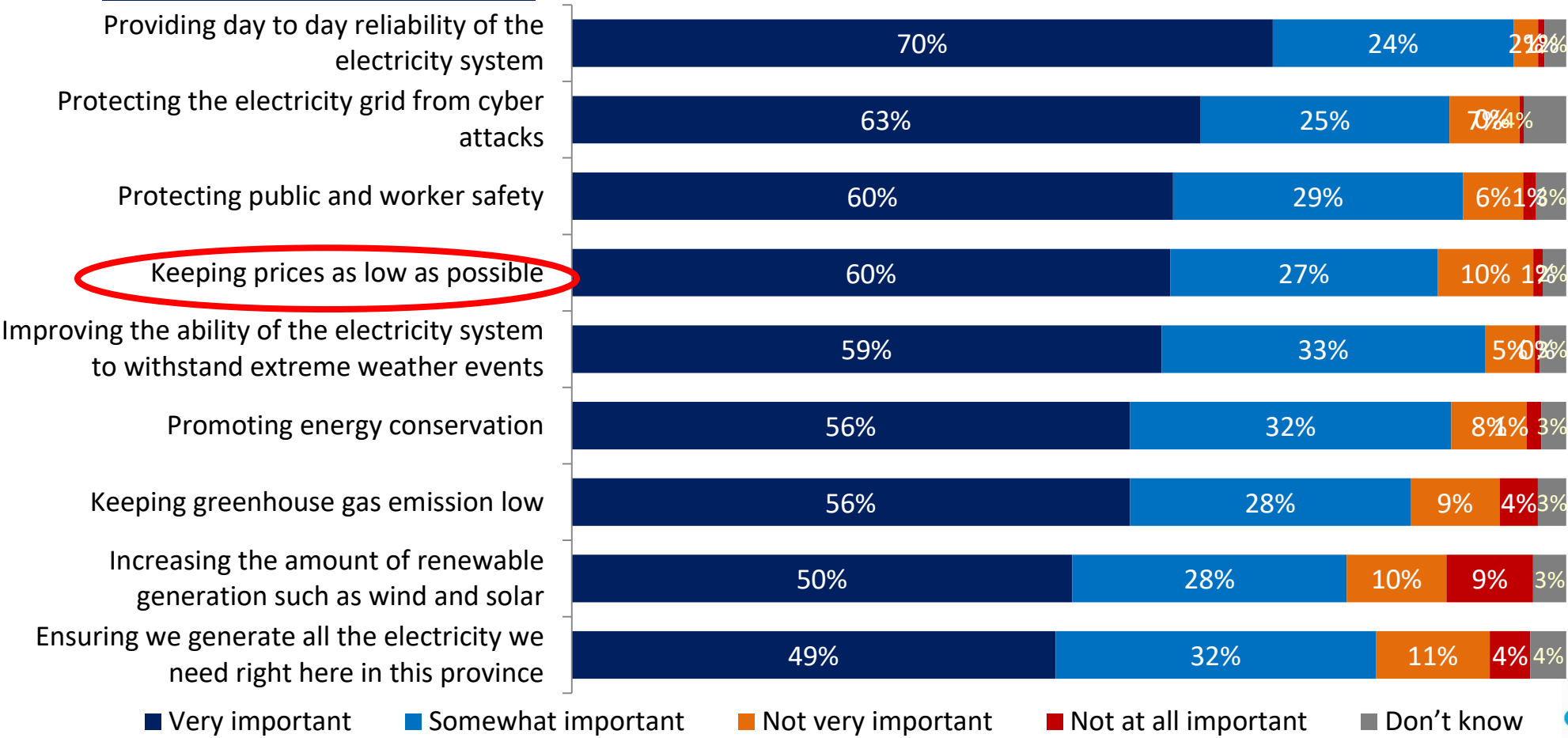
**NOTE:** Don't know not shown.

# Priority for Ontario Government: Ranking can mislead. While price and reliability are most important, other topics are not unimportant



There are a number of issues people would like the government to focus on when it comes to electricity. How important are following priorities to you?  
[asked of all respondents, only results of Ontario are shown]

## Among Ontarians



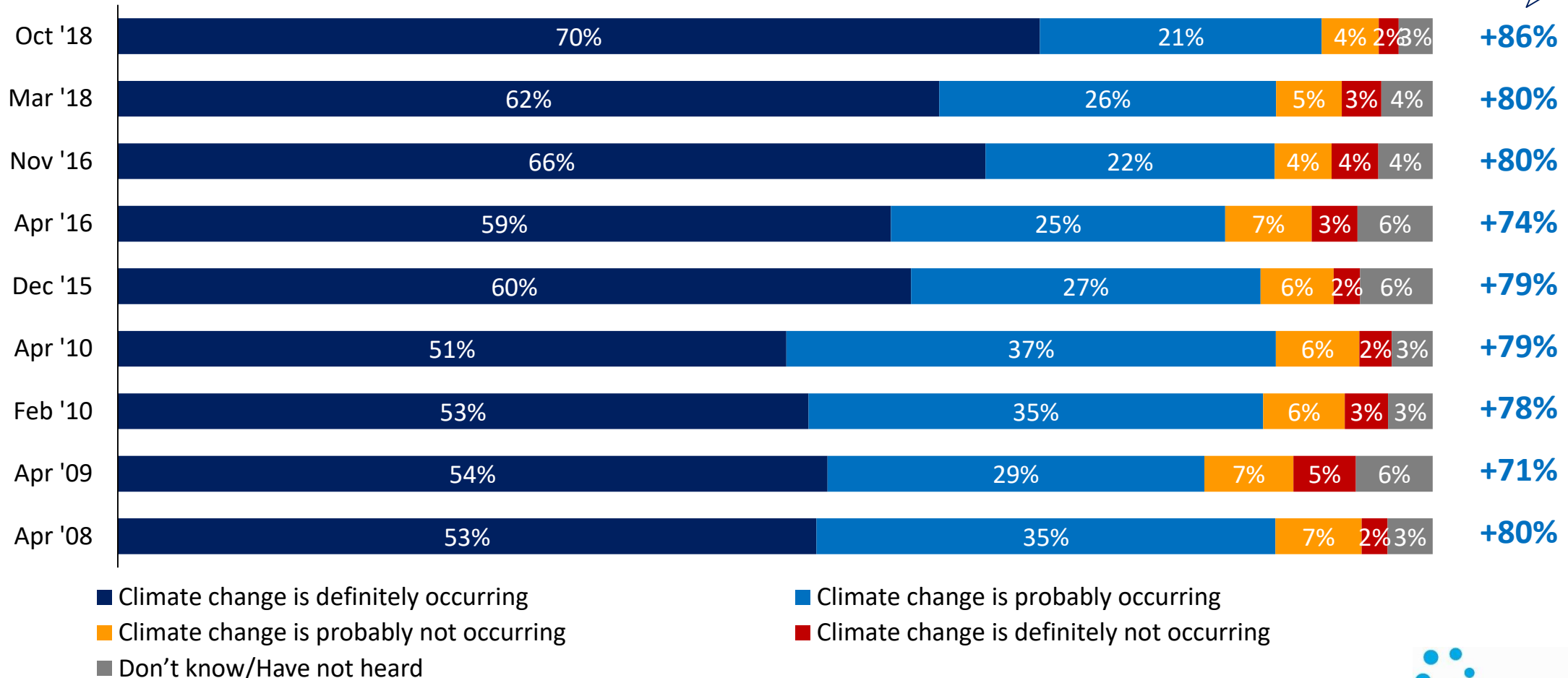


# Carbon Tax

October 2018 CTM, National

# Belief in CC: 7-in-10 (70%) believe climate change is “definitely occurring,” much higher than in March 2018

Thinking about your own personal view, do you believe that...?  
[asked of all respondents]

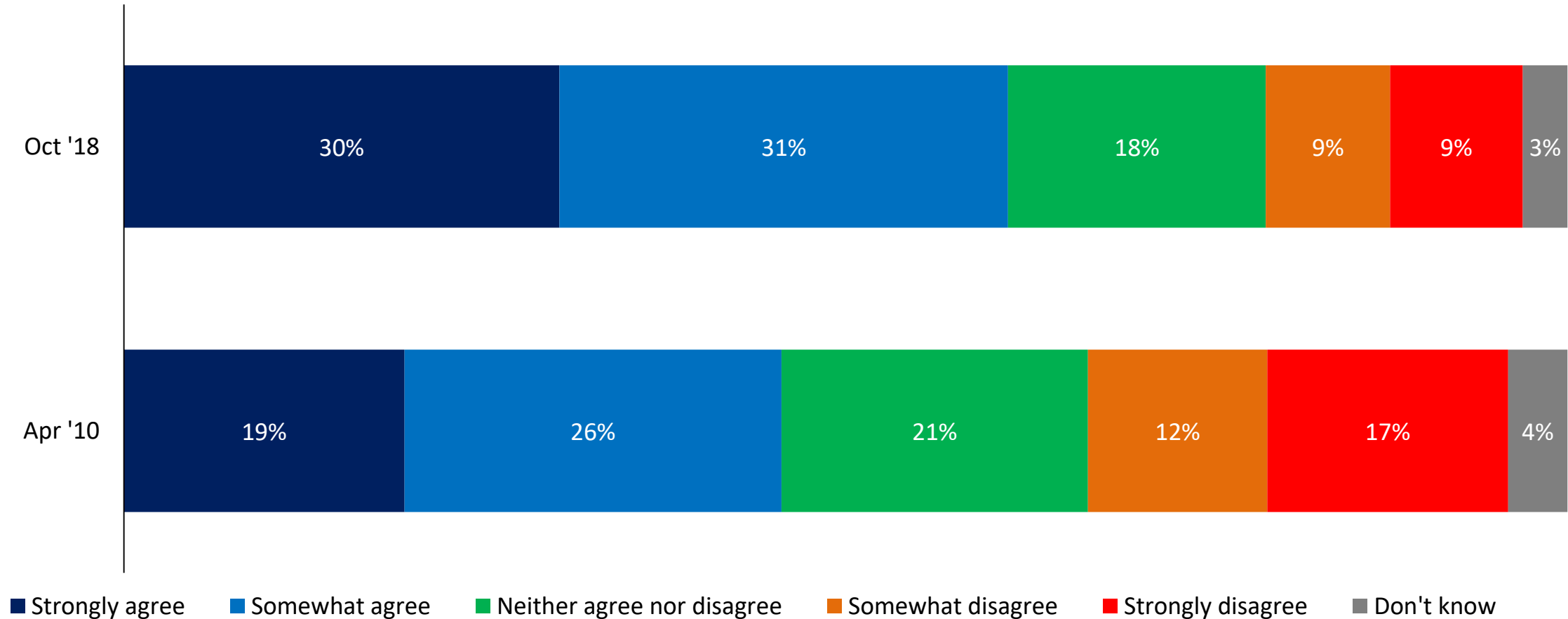


**NOTE:** Prior to 2010, the term “global warming” was used in place of “climate change”  
Prior to Nov '16, only those who have heard of “climate change” are asked of this question; those who have not heard are combined with the “Don't know” responses here.

# 6-in-10 (61%) say they have personally experienced unusual weather that they feel is “clear proof” of climate change, higher than in 2010



Do you agree or disagree with the following statement: **I have personally experienced unusual weather that I feel is clear proof of climate change.**  
[asked of all respondents]



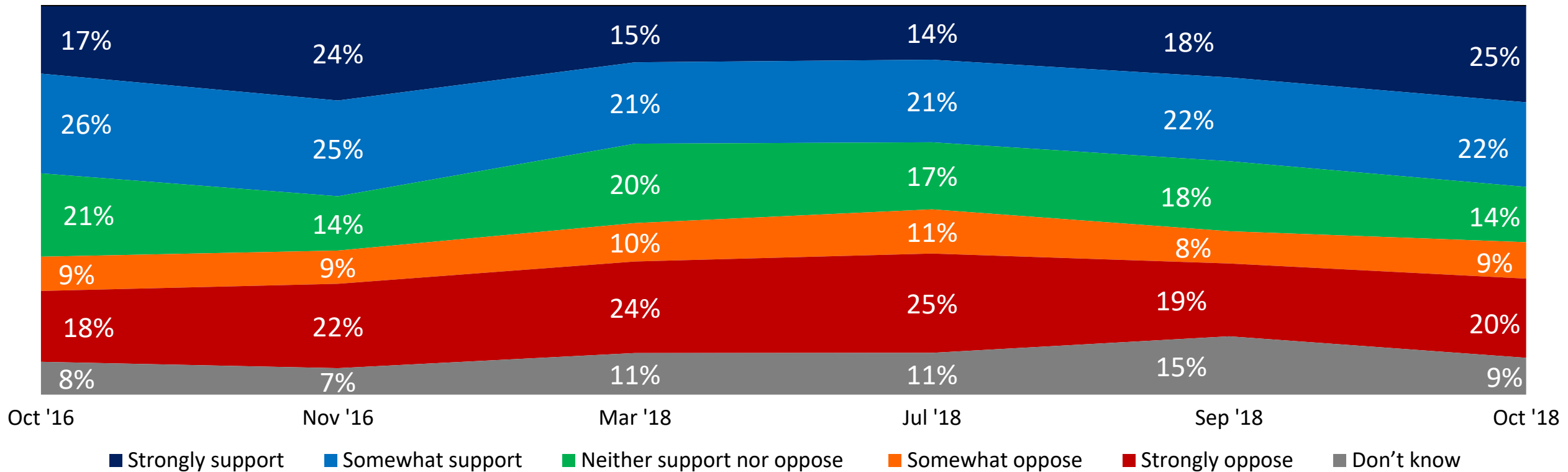
# Support for Carbon Tax: nearly half (47%) support minimum price, at highest levels since 2016



Do you support or oppose the federal government implementing the following policy?

Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.

[asked of all respondents]



# Support/Oppose by Cluster/Gap: Differential Conservatives divided on minimum price for carbon



Do you support or oppose the federal government implementing the following policy? Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government. BY Value Cluster [asked of all respondents]

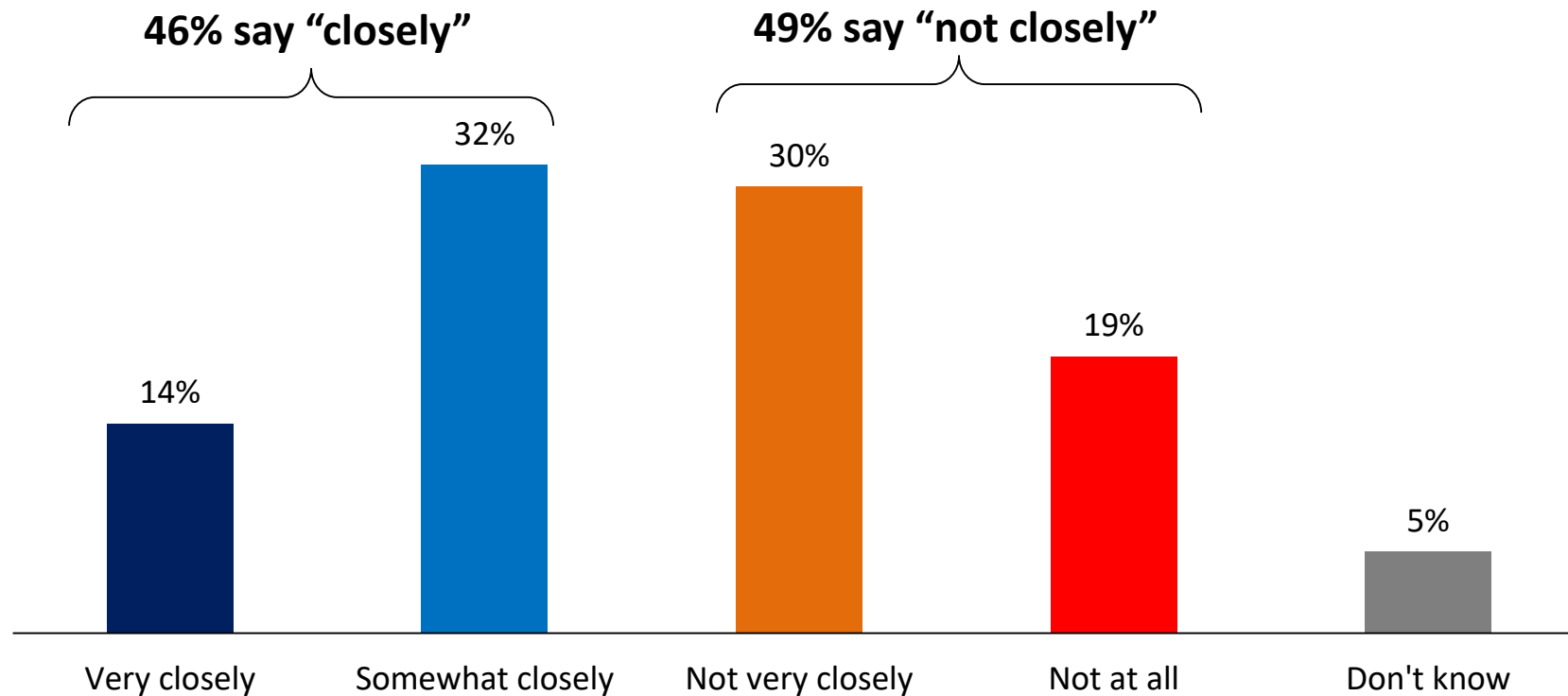
|             | Def Con. | Pop Con. | Business Liberals | Left Liberals | Thrifty Mod. | Core Left |
|-------------|----------|----------|-------------------|---------------|--------------|-----------|
| SUPPORT     | 36%      | 18%      | 56%               | 43%           | 44%          | 73%       |
| OPPOSE      | 40%      | 68%      | 23%               | 21%           | 23%          | 9%        |
| NET SUPPORT | -4%      | -50%     | 34%               | 22%           | 21%          | 64%       |

# Carbon Tax Engagement: 46% are following the issue closely, highest engagement among Liberals and Conservatives



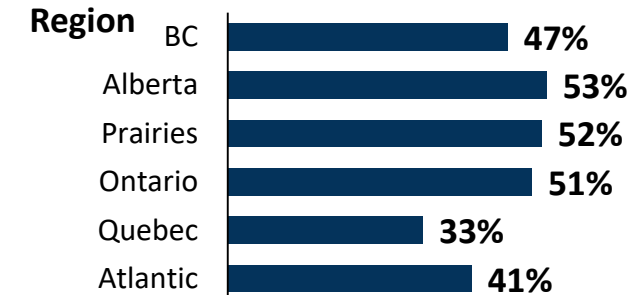
In the past week, the federal government announced the details of the national minimum price for carbon. The federal government has determined that Saskatchewan, Manitoba, Ontario and New Brunswick have failed to meet the national minimum price. In those provinces, the federal government will bring in a tax on carbon-based fuels. The federal government will use 90 percent of those revenues to provide a rebate to consumer in those provinces. The remaining 10% will be used to provide support for schools, hospitals, small and medium-sized businesses, colleges and universities, municipalities, not-for-profit organizations and Indigenous communities. How closely have you been following the news about this announcement?

[asked of all respondents]

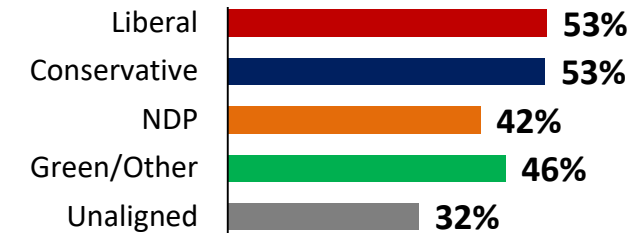


## Sample Breakdown ▶▶

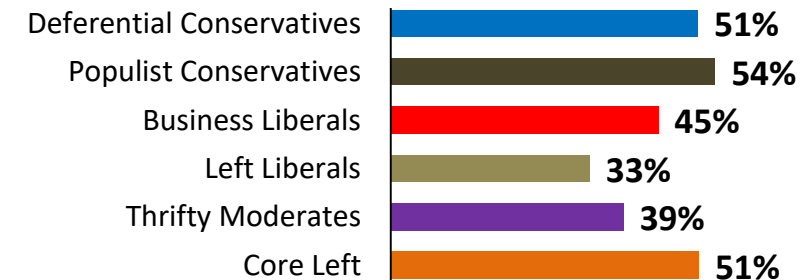
*Those who say "closely"*



## Federal Party ID



## Value Clusters





# Carbon Tax Support: 4-in-10 (40%) support the federal govt's carbon tax; 6-in-10 (61%) Liberals and 53% of NDP support it

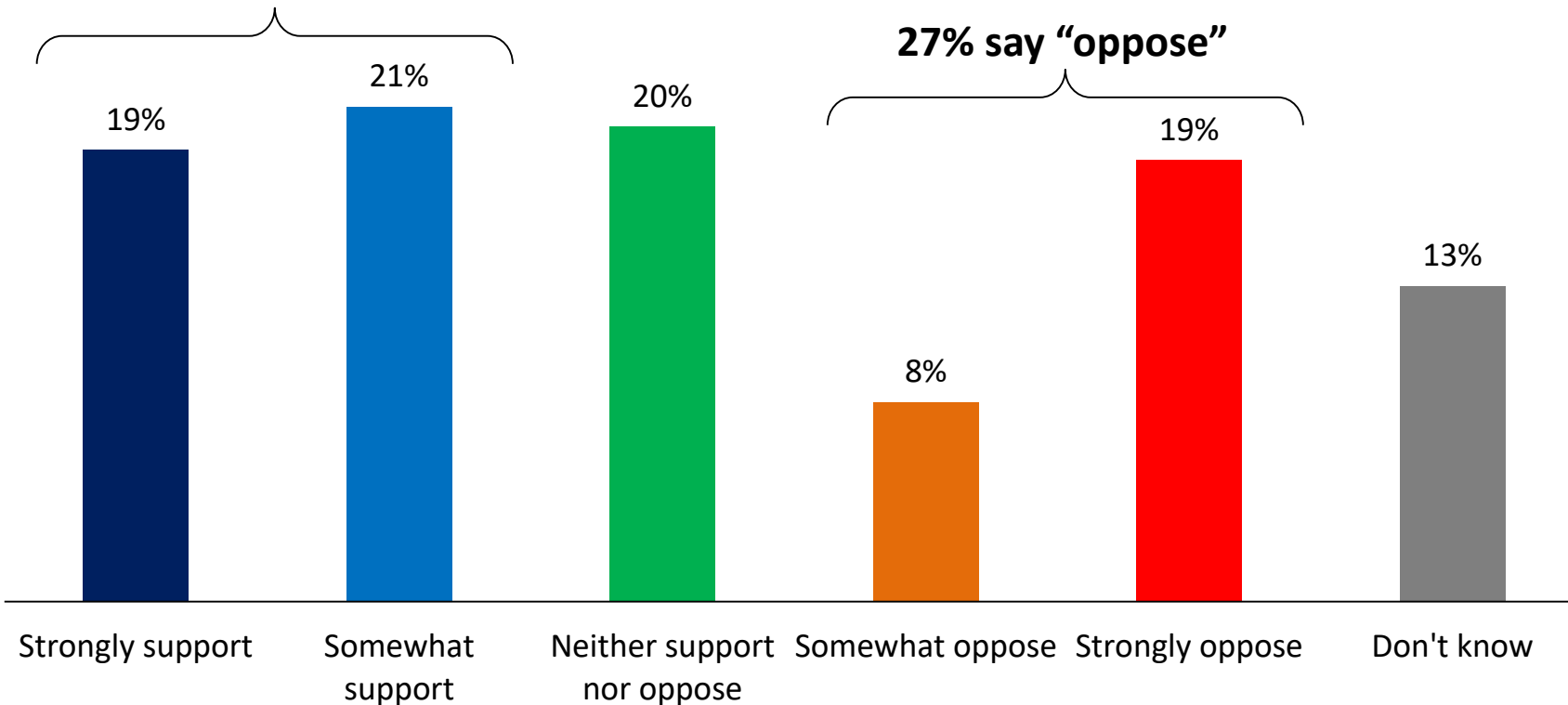


Now you know the details of the federal government's carbon price policy, do you support or oppose that policy?

[asked of all respondents]

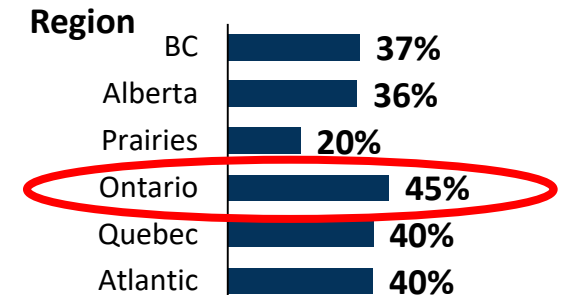
40% say "support"

27% say "oppose"

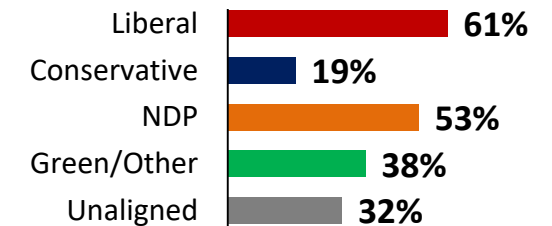


Sample Breakdown ▶▶

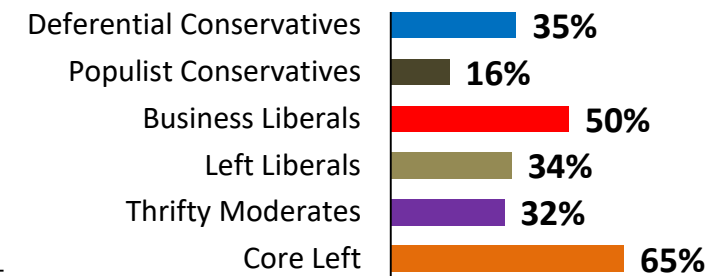
*Those who say "support"*



Federal Party ID



Value Clusters



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# The Fair Hydro Plan

## October 2018 CTM

# Fair Hydro Plan Initiatives: majority (51%) support removing the cost of<sup>23</sup> relief programs and funding them through existing taxes

Q

Now we would like to talk about *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.

[asked only of Ontario respondents]

## Among Ontarians

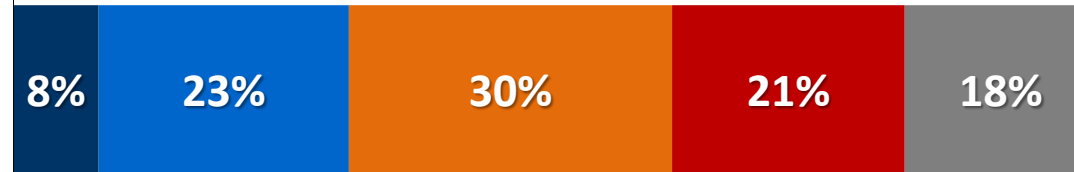
Remove the cost of certain electricity-related relief programs, such as low income assistance and rural relief, from electricity bills, and instead fund those programs through existing taxes



Net  
Support

**+22%**

Spreading out the financing costs of electricity generation contracts over a longer period which will incur additional interest payments



**-20%**

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

# Trade-off between now and then: nearly 2-in-3 (63%) feel we should stop pushing costs into the future, even if that means paying more now



Spreading out the financing costs of electricity generation contracts over a longer period means Ontarians pay lower prices today but will pay higher prices in the future to pay back the money that is borrowed and the interest costs. Which of the following statements is closest to your point of view?  
[asked only of Ontario respondents]

## Among Ontarians

### Smith says:

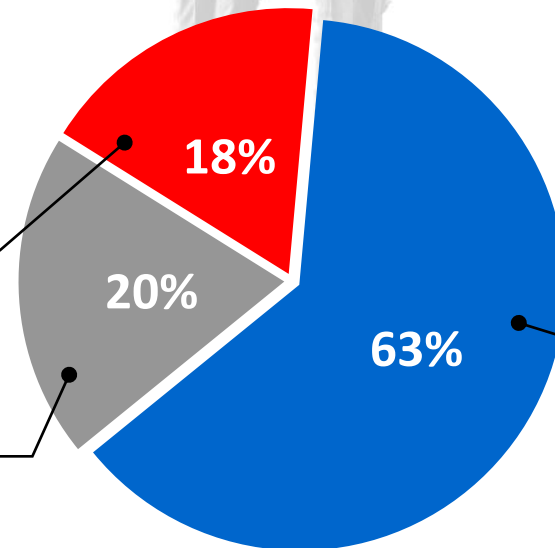
We should continue to keep costs down today, even if it means paying more in the future.

### Jones says:

We should stop pushing costs into the future, even if that means paying more today.

18% Agree with Smith

20% Don't Know



63% Agree with Jones

# Trade-off between now and then: even heavy strugglers prefer to pay now rather than delaying electricity costs, even if it means paying more

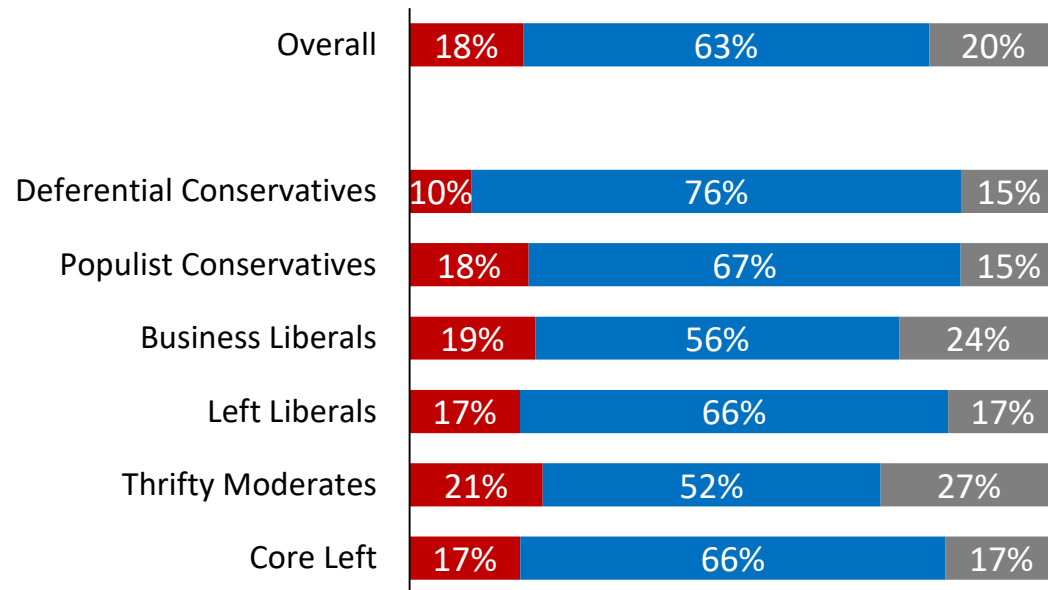


Spreading out the financing costs of electricity generation contracts over a longer period means Ontarians pay lower prices today but will pay higher prices in the future to pay back the money that is borrowed and the interest costs. Which of the following statements is closest to your point of view?

BY Value Clusters and Economic Gap

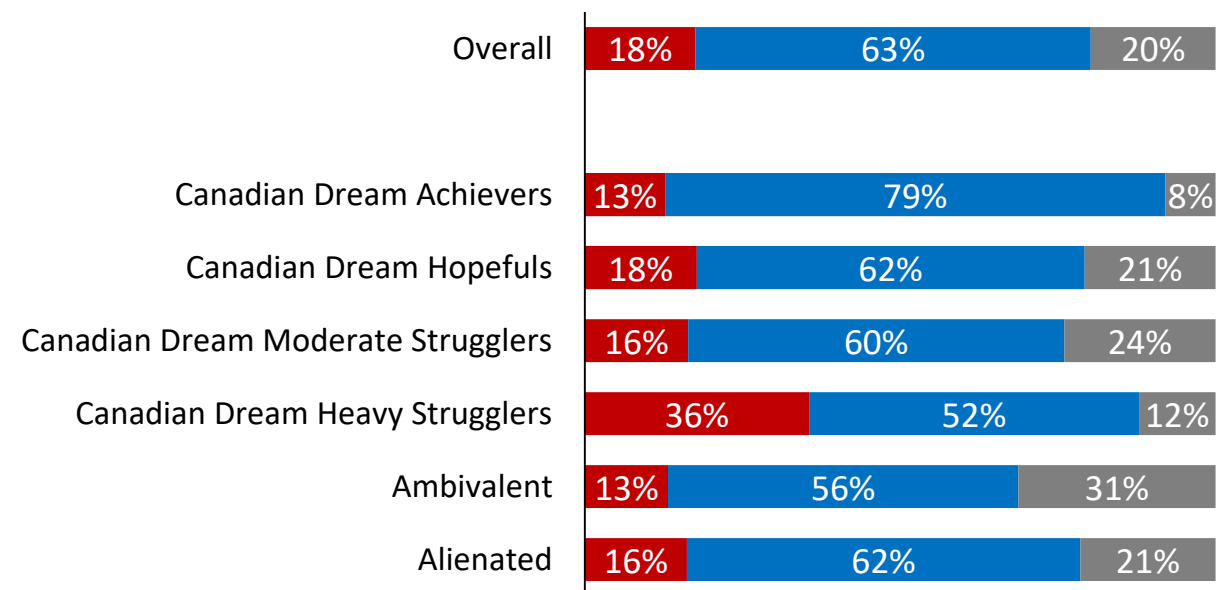
[asked only of Ontario respondents]

## By Value Clusters



- Keep costs down today, even if it means paying more in the future
- Stop pushing costs into future, even if it means paying more today
- Don't know

## By Economic Gap



- Keep costs down today, even if it means paying more in the future
- Stop pushing costs into future, even if it means paying more today
- Don't know

# Key Takeaways

1.

While most of the PC base remains firm, Ford may be losing some of his more deferential voters

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2.

The Liberals have rebounded now voters vented their anger through the election.

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3.

While price is the most important electricity priority to Ontarians today, it is far from the only thing that matters.

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4.

While it is early in the debate, the federal carbon policy enjoys initial support and divides Deferential Conservatives

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5.

On Fair Hydro Plan, Ontarians support shifting social costs to tax base but do not support shifting costs to the future





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