Energy & Public Opinion

OEN Luncheon
December 8, 2021
Toronto | Fairmont Royal York

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Today's Agenda

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The Sector is in a Good Position

While down from recent peaks, Ontarians are more likely than in the past to feel well protected on Reliability and Quality

Q And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the reliability and quality of electricity service in my province.**
[asked of all respondents]

Net Agreement

Canada — Ontario

	Oct 2014	Nov 2015	Nov 2016	Nov 2017	Oct 2018	Nov 2019	Dec 2020	Nov 2021
Canada	23%	36%	33%	37%	41%	43%	55%	43%
Ontario	17%	29%	19%	24%	34%	42%	52%	37%

Note: Prior to 2017, "Neither agree nor disagree" was not provided as an answer.

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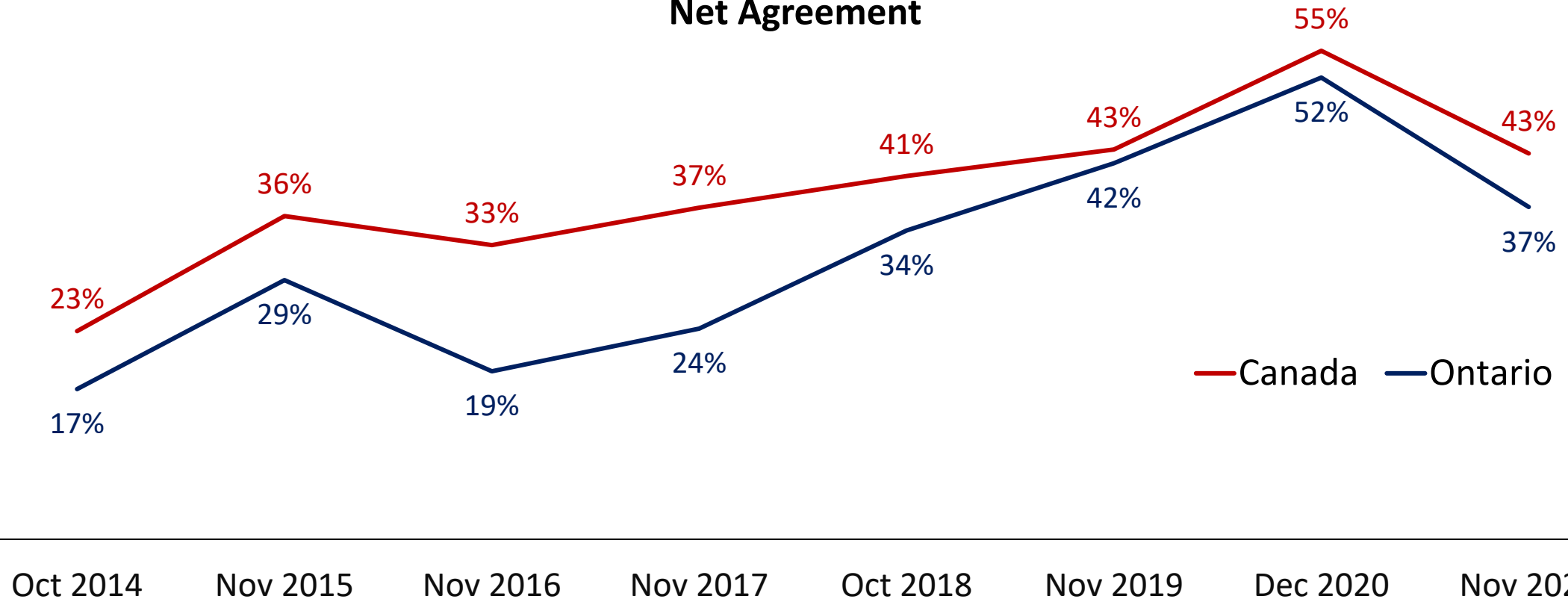
Ontarians are more likely than in the past to feel financially protected

Q And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the price of electricity service in my province.**
[asked of all respondents]

Net Agreement

Canada: -23%, -23%, -23%, -15%, -6%, -2%, 13%, -1%

Ontario: -30%, -47%, -54%, -35%, -22%, -13%, -1%, -7%

Oct 2014 | Nov 2015 | Nov 2016 | Nov 2017 | Oct 2018 | Nov 2019 | Dec 2020 | Nov 2021

Canada ── Ontario

Note: Prior to 2017, "Neither agree nor disagree" was not provided as an answer.
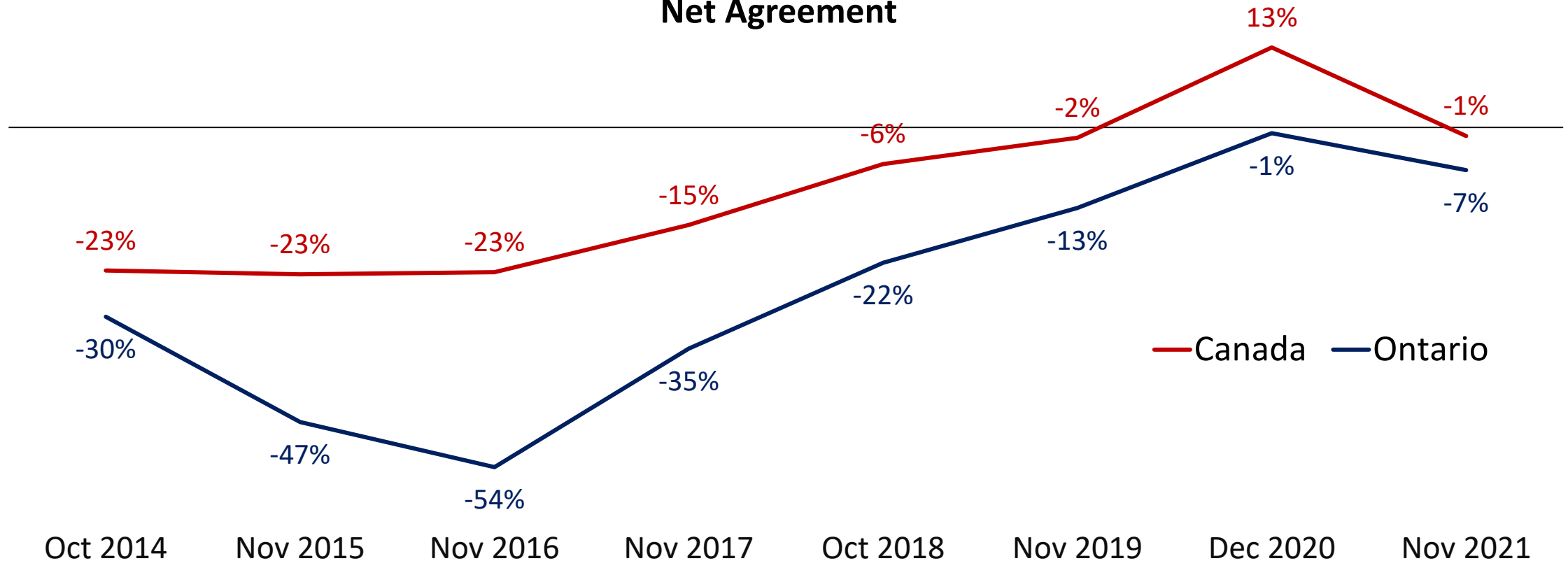
Energy Sector Players: The general rule in Ontario electricity is that the players tend to move together

Q Have you ever heard of [ORGANIZATION]? [IF YES] And do you have a strongly favourable, somewhat favourable, neutral, somewhat unfavourable or strongly unfavourable impression of [ORGANIZATION], or would you say you haven't really heard enough about it to have a firm impression?

[asked of all respondents; n-size ranges from approx. 650 (prior to April 2003) to approx. 600 (April 2003 to Nov 2021)]

Net Favourability

— Ontario Power Generation (OPG)
— Hydro One (HONI)
— The Ontario Energy Board (OEB)
— The Independent Electricity System Operator (IESO)
— Your local electricity distributor (LDC)

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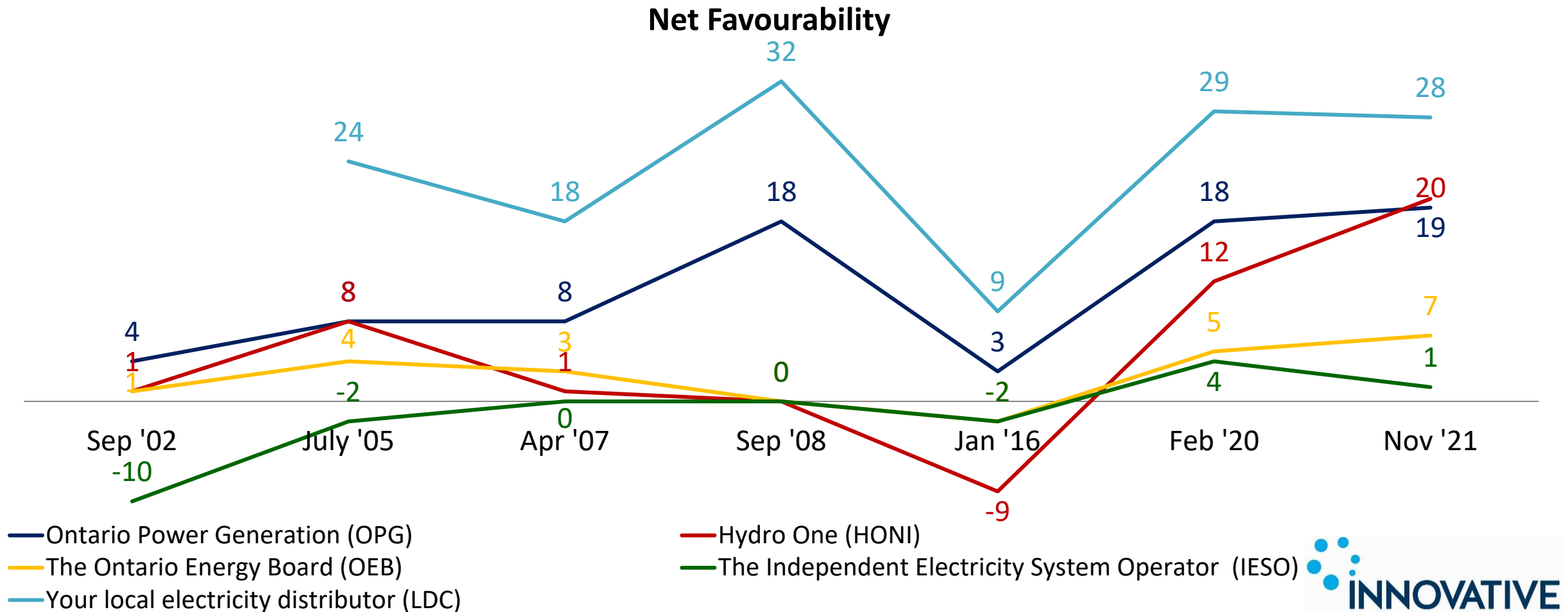
Belief in Climate Change: Nearly two-thirds of Ontarians say climate change is definitely occurring

Q Thinking about your own personal view, do you believe that...
[asked of all respondents; n=1,000]

64%	26%	3%	2%	5%
Climate change is definitely occurring	Climate change is probably occurring	Climate change is probably not occurring	Climate change is definitely not occurring	Don't know

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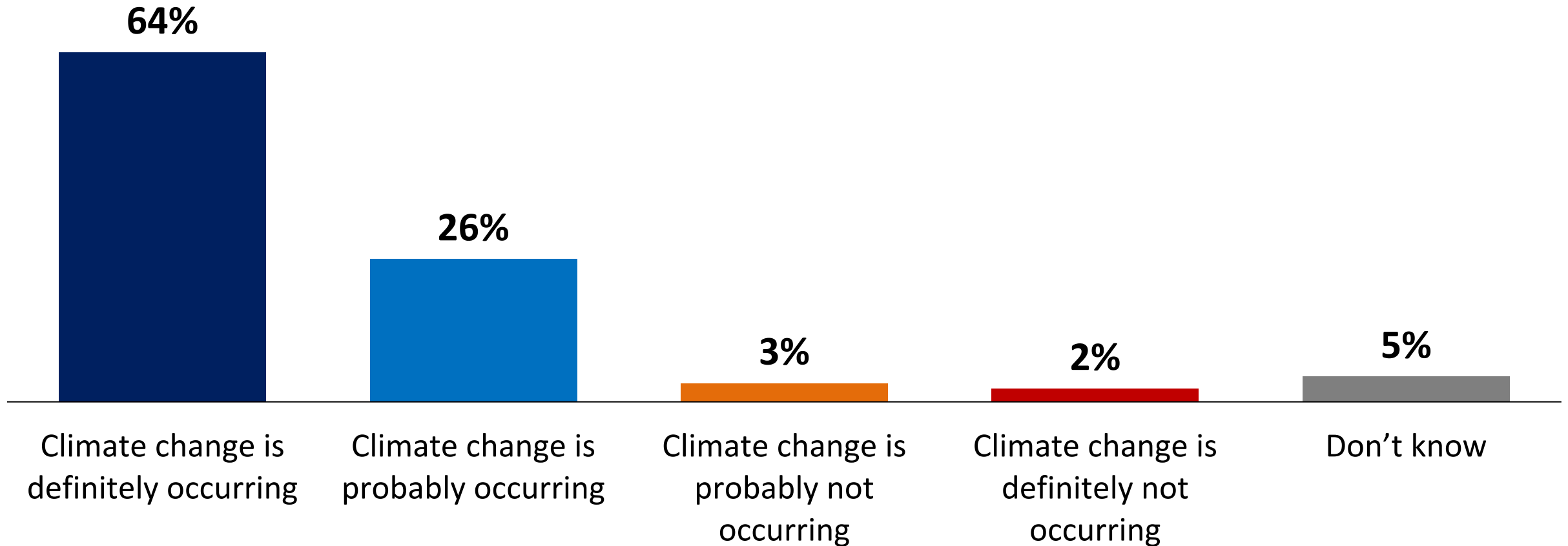
... but an Election is Coming

Provincial Vote Tracking: The PCs and Liberals have been trading the lead, NDP more of a threat

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**
[asked of all respondents; n=1000]

Legend: Progressive Conservative — Liberal — NDP — Green — Other — Undecided/DK — Would not vote/None

Current data: November 2021
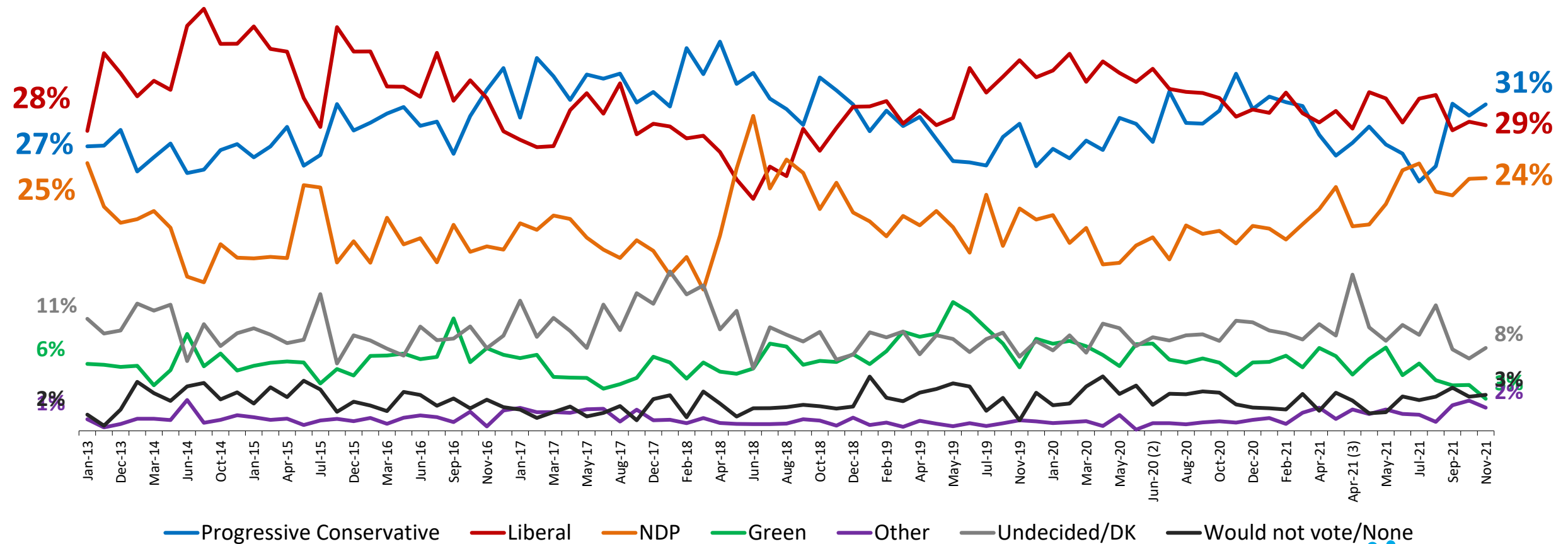
Provincial Party ID Tracking: The Liberal brand was damaged by the federal election, eroding their core strength

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a...
[asked of all respondents; n=1000]

Legend: Liberal — Progressive Conservative — NDP — Green — Other — None/Independent — Don't know

Current data: November 2021

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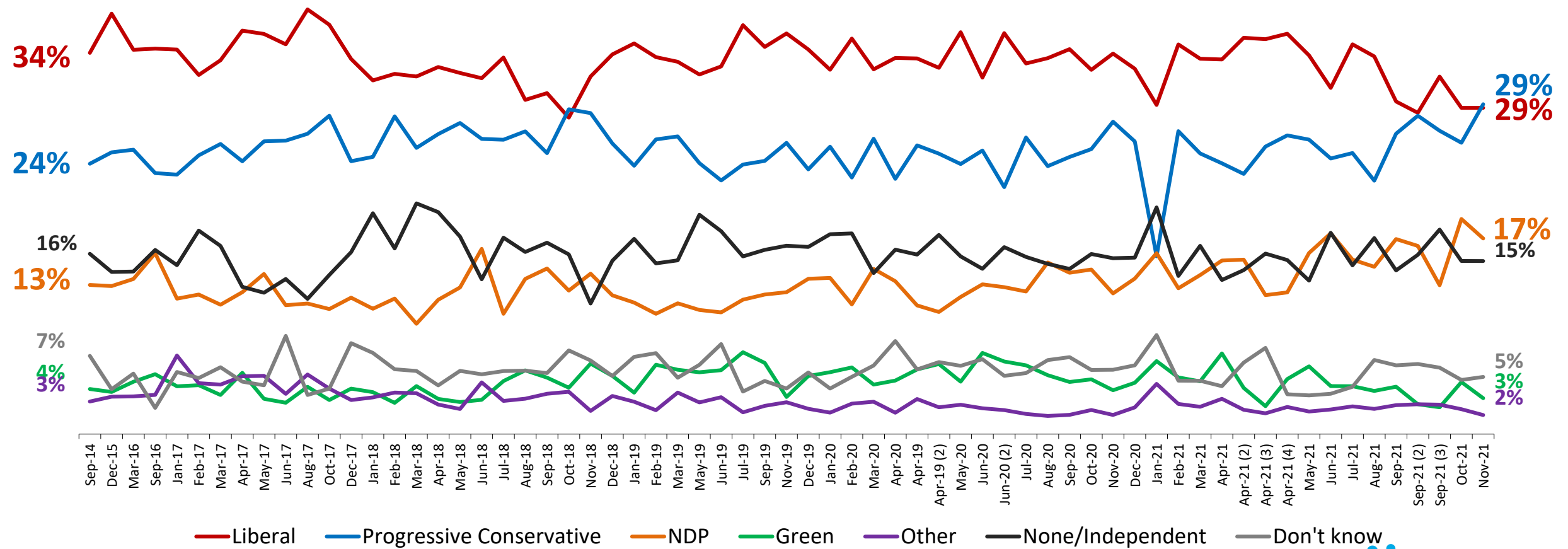
Best Premier Tracking: Ford is bouncing back from his spring decline, Horwath in a distant second, Del Duca trails

Q Which of the following leaders would make the best Premier of Ontario?
[asked of all respondents; n=1000]

Tim Hudak   Patrick Brown   Vic Fedeli   Doug Ford

John Fraser   Steven Del Duca

33%

26%   23%

21%   20%
20%
19%

11%   11%

8%

5%

1%

Dec-12, Jan-13, Jun-13, Aug-13, Mar-14, Dec-15, Sep-16, Mar-17, Aug-17, Feb-18, May-18, May-18 (2), May-18 (3), May-18 (4), Jun-18, Jun-18 (2), Jun-18 (3), Jan-20, May-20, Jun-20, Jul-20, Dec-20, Jan-21, Feb-21, Mar-21, Apr-21, Apr-21 (2), Apr-21 (3), Apr-21 (4), May-21, Jun-21, Jul-21, Aug-21, Sep-21, Oct-21, Nov-21

— Del Duca/Fraser/Wynne/McGuinty   — Ford/Fedeli/Brown/Hudak   — Andrea Horwath

— Other   — None of the above   — Undecided/Don't know

Current data: November 2021

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Leadership Attributes: Ford leads on competent …

Q Now we would like to read you a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes…

[asked of all respondents; n=1000]

Competent

Date	Doug Ford/Tim Hudak, PC	Steven Del Duca/Kathleen Wynne, Liberal	Andrea Horwath, NDP	Mike Shreiner, Green Party	Other	None	Undecided
Nov-21	30%	12%	21%	6%		12%	18%
Jul-21	25%	16%	24%	6%		7%	20%
Dec 31-Jan 5	31%	12%	17%	5%		8%	25%
Dec 17-30	38%	8%	16%	5%		10%	21%
Jul-20	38%	10%	18%	7%		8%	20%
Jun-18	22%	17%	26%			16%	18%
May-18 (2)	21%	20%	26%			14%	19%
May-18	18%	20%	23%			14%	25%
Mar-14	17%	28%	17%			22%	16%

Legend:
- ■ Doug Ford/Tim Hudak, PC
- ■ Steven Del Duca/Kathleen Wynne, Liberal
- ■ Andrea Horwath, NDP
- ■ Mike Shreiner, Green Party
- ■ Other
- ■ None
- ■ Undecided

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Note: Prior to July 2020, the Green Party leader and "Other" were not given as options and the final options were "none of them stand out" and "don't know".
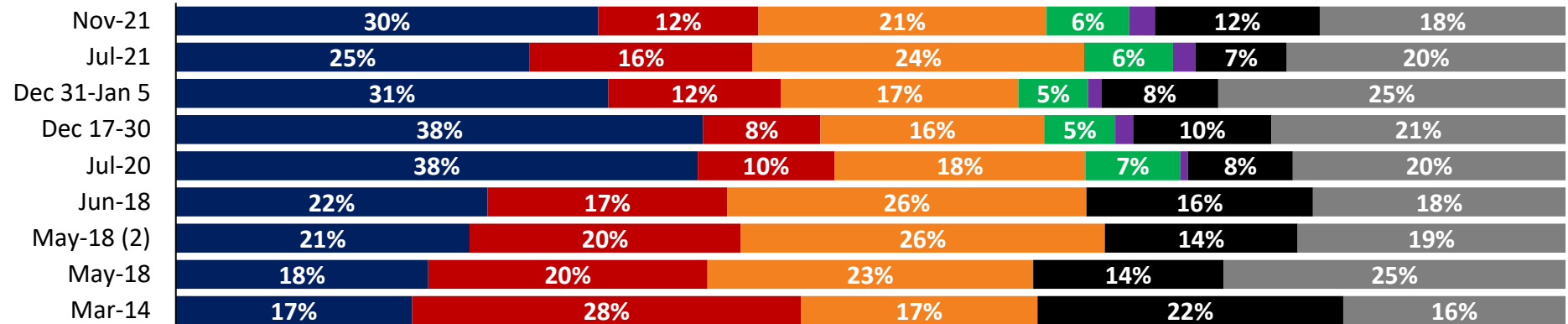
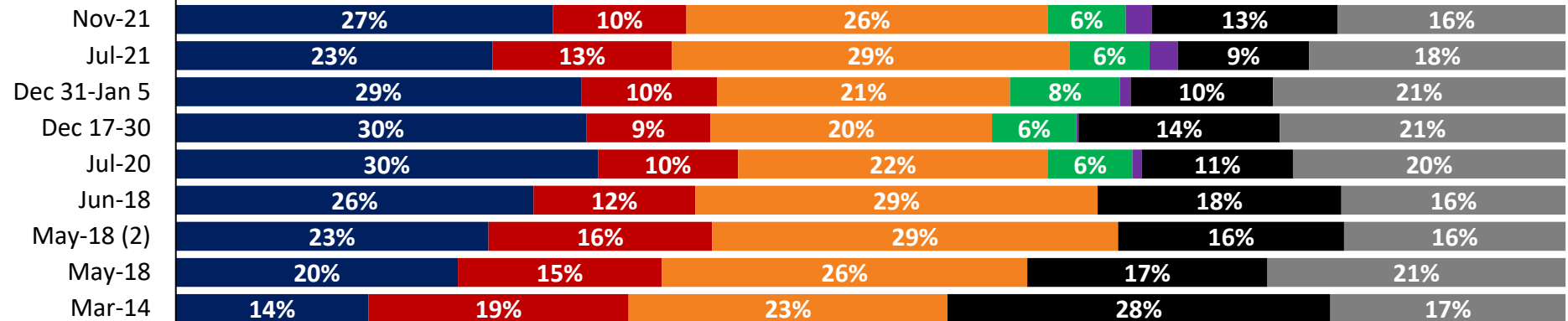# Leadership Attributes: Ford leads on competent … and on compassion

Q Now we would like to read you a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes…

[asked of all respondents; n=1000]

Competent

	Ford/PC	Liberal	NDP	Green	Other	None	Undecided
Nov-21	30%	12%	21%	6%		12%	18%
Jul-21	25%	16%	24%	6%		7%	20%
Dec 31-Jan 5	31%	12%	17%	5%		8%	25%
Dec 17-30	38%	8%	16%	5%		10%	21%
Jul-20	38%	10%	18%	7%		8%	20%
Jun-18	22%	17%	26%			16%	18%
May-18 (2)	21%	20%	26%			14%	19%
May-18	18%	20%	23%			14%	25%
Mar-14	17%	28%	17%			22%	16%

Cares about people like me

	Ford/PC	Liberal	NDP	Green	Other	None	Undecided
Nov-21	27%	10%	26%	6%		13%	16%
Jul-21	23%	13%	29%	6%		9%	18%
Dec 31-Jan 5	29%	10%	21%	8%		10%	21%
Dec 17-30	30%	9%	20%	6%		14%	21%
Jul-20	30%	10%	22%	6%		11%	20%
Jun-18	26%	12%	29%			18%	16%
May-18 (2)	23%	16%	29%			16%	16%
May-18	20%	15%	26%			17%	21%
Mar-14	14%	19%	23%			28%	17%

Legend:
- Doug Ford/Tim Hudak, PC
- Andrea Horwath, NDP
- Other
- Undecided
- Steven Del Duca/Kathleen Wynne, Liberal
- Mike Shreiner, Green Party
- None

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Note: Prior to July 2020, the Green Party leader and "Other" were not given as options and the final options were "none of them stand out" and "don't know".

Leader Favourables: Doug Ford has both the highest favourable and highest unfavourable impression in the province
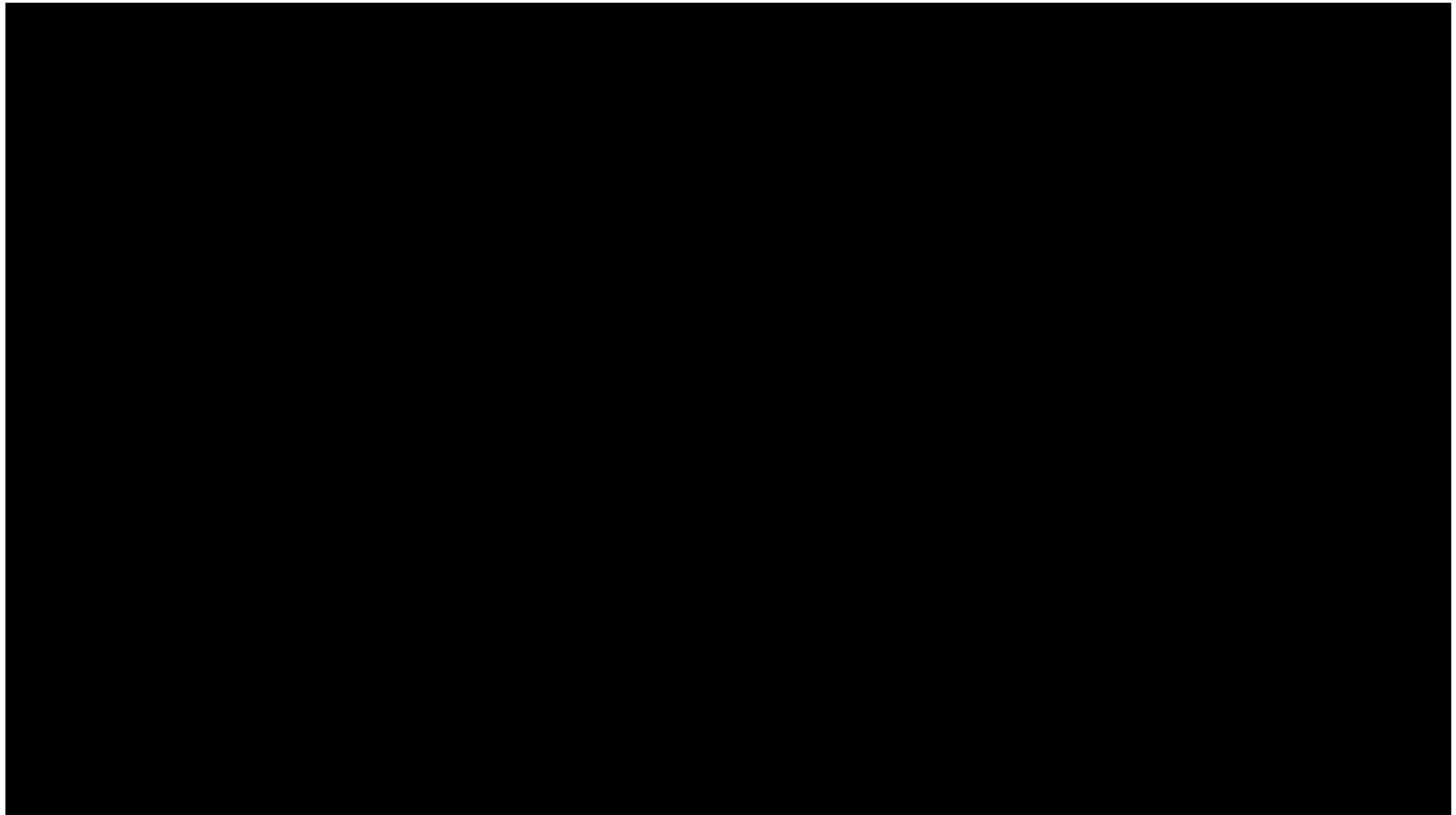
Q Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.
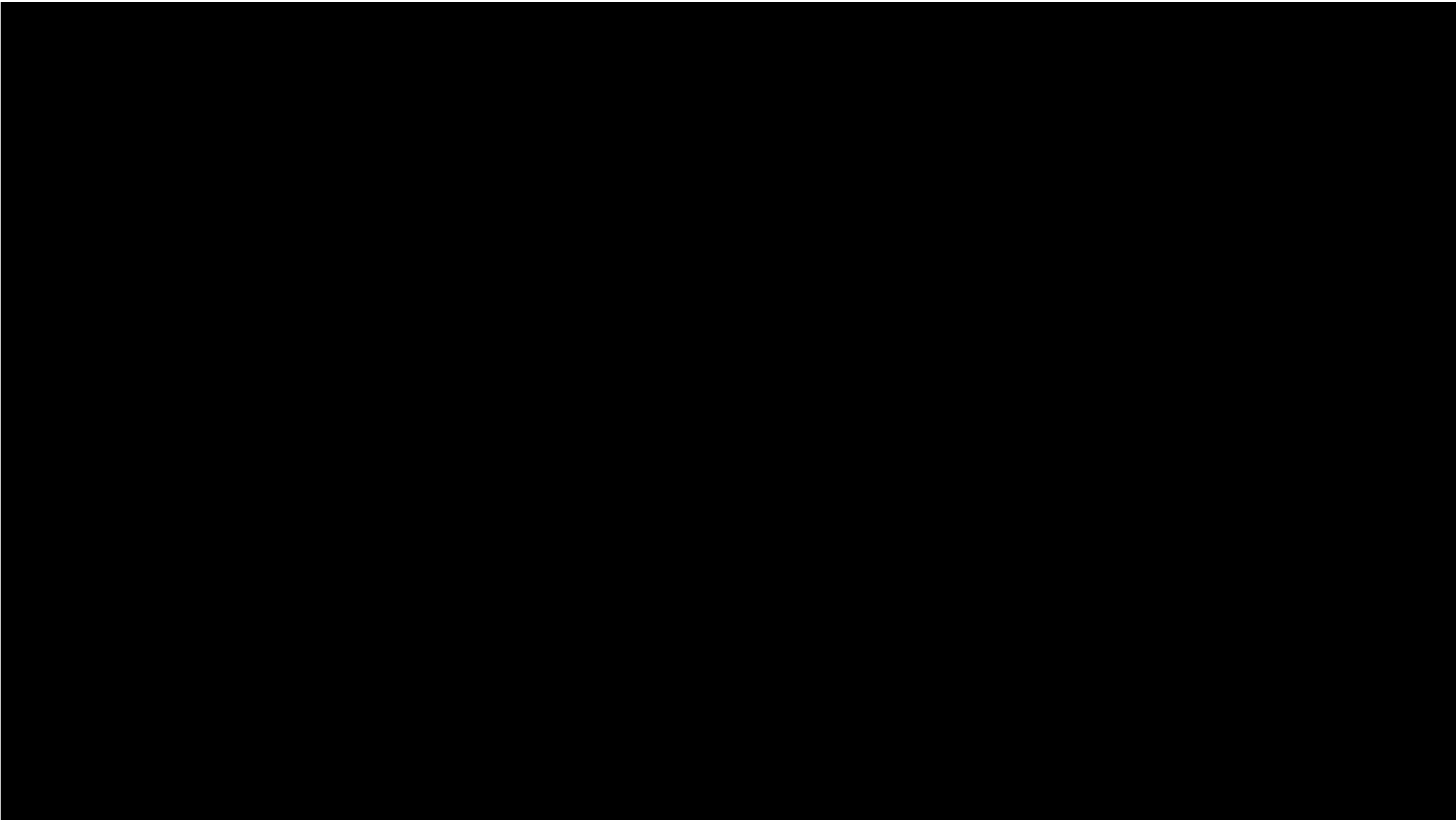[asked of all respondents; n=1000]

Leader	Very favourable	Somewhat favourable	Neutral/Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't know
Doug Ford	12%	24%	19%	15%	26%		3%
Andrea Horwath	10%	18%	26%	15%	20%	4%	7%
Steven Del Duca	5%	13%	29%	14%	19%	10%	11%
Mike Schreiner	4%	9%	29%	9%	11%	22%	16%

■ Very favourable ■ Somewhat favourable ■ Neutral/Neither favourable nor unfavourable ■ Somewhat unfavourable ■ Very unfavourable ■ Do not recognize ■ Don't know

Current data: November 2021

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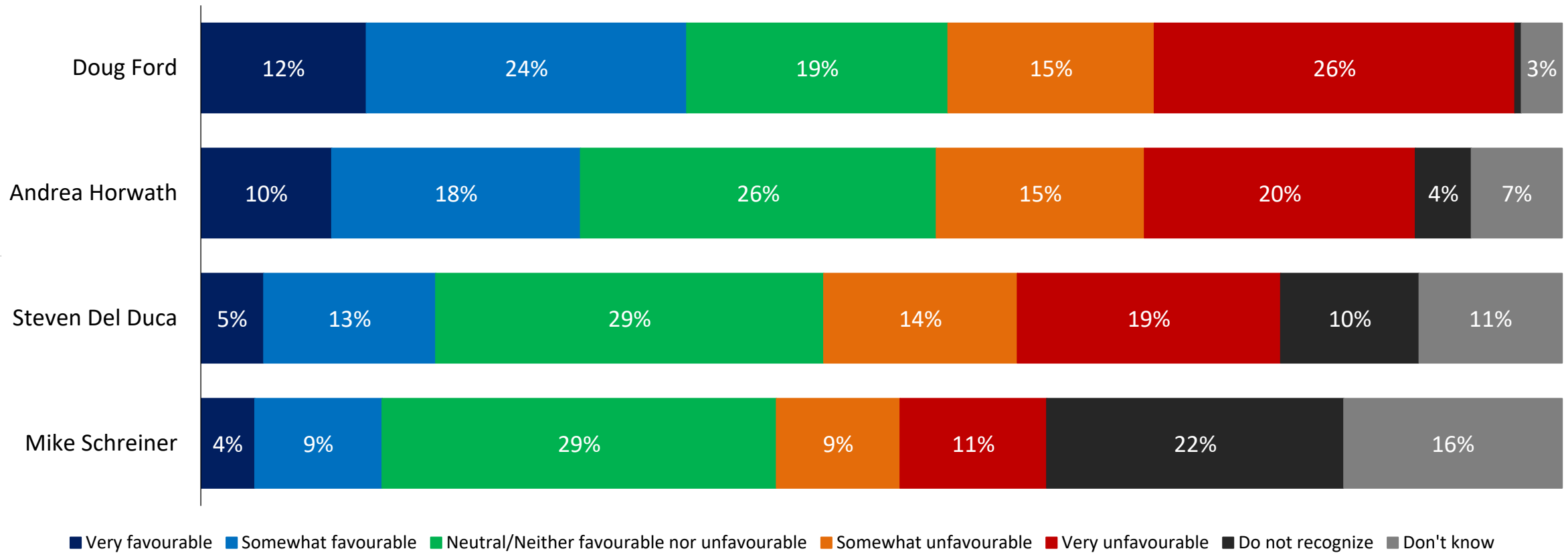
Define or Be Defined

Remember life under Kathleen Wynne? Steven Del Duca wants to take you back.

# Kathleen Wynne's Right Hand Man

Steven Del Duca Favourability: Del Duca's favourability is down month, as unfavourability grows to its highest level since tracking

Q Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.
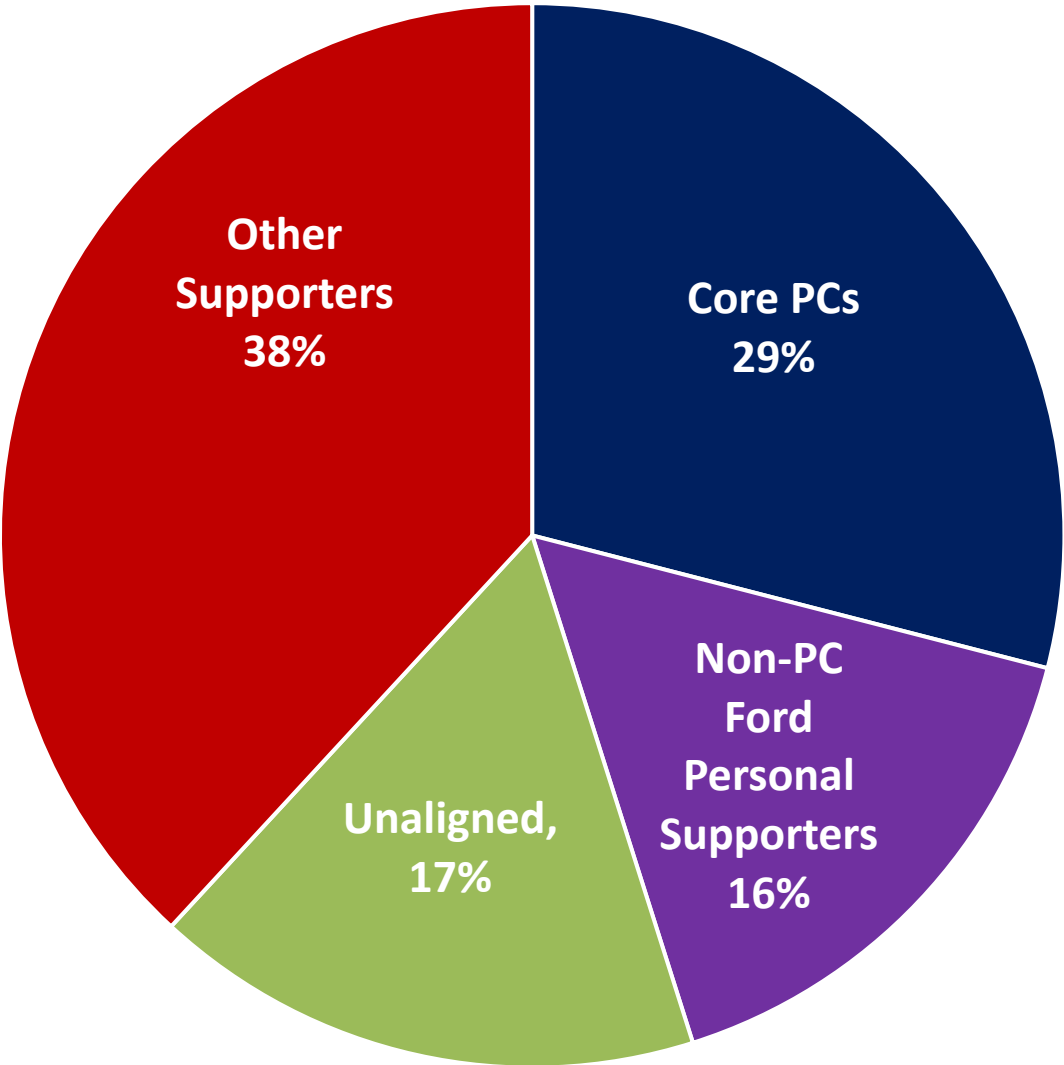
[asked of all respondents; n=1000]

Legend: ■ Very favourable ■ Somewhat favourable ■ Neither favourable nor unfavourable ■ Don't know + don't recognize ■ Somewhat unfavourable ■ Very unfavourable
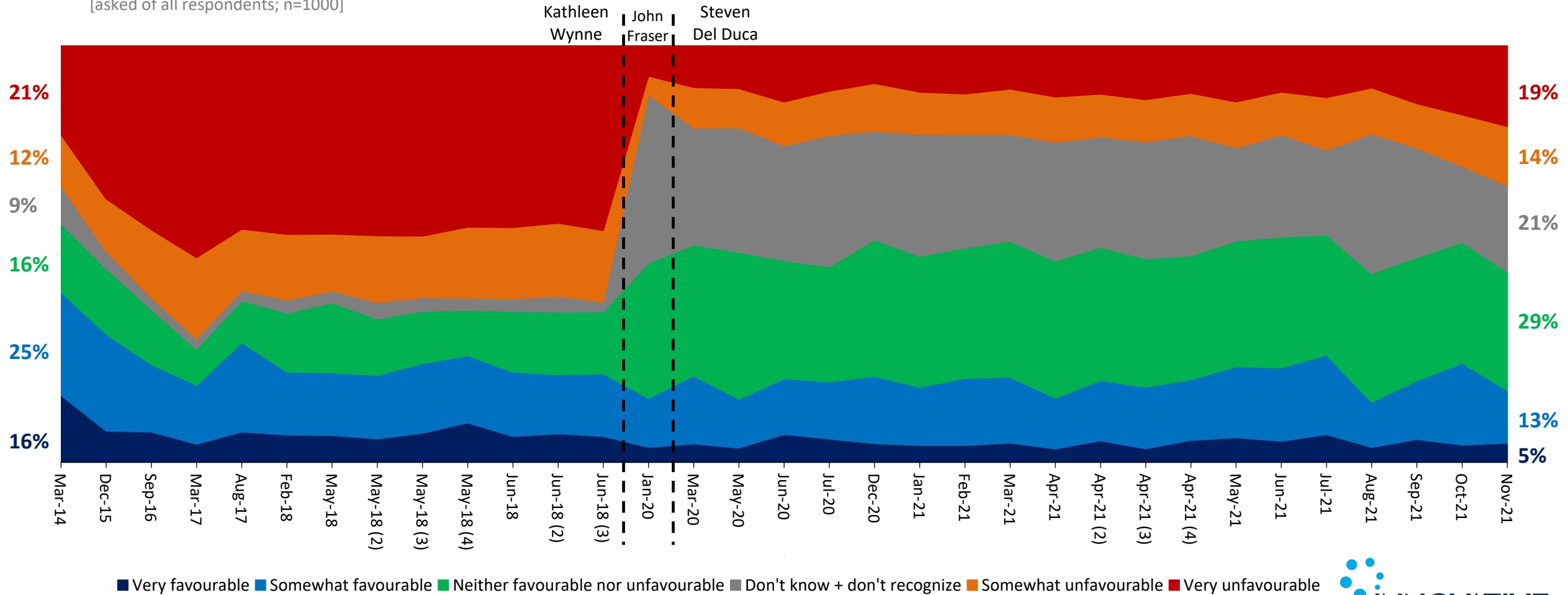
Not All Voters Are Equal

Ford Political Segmentation: Nearly 3-in-10 Ontarians are Core PCs, while 16% are not PCs but support Ford

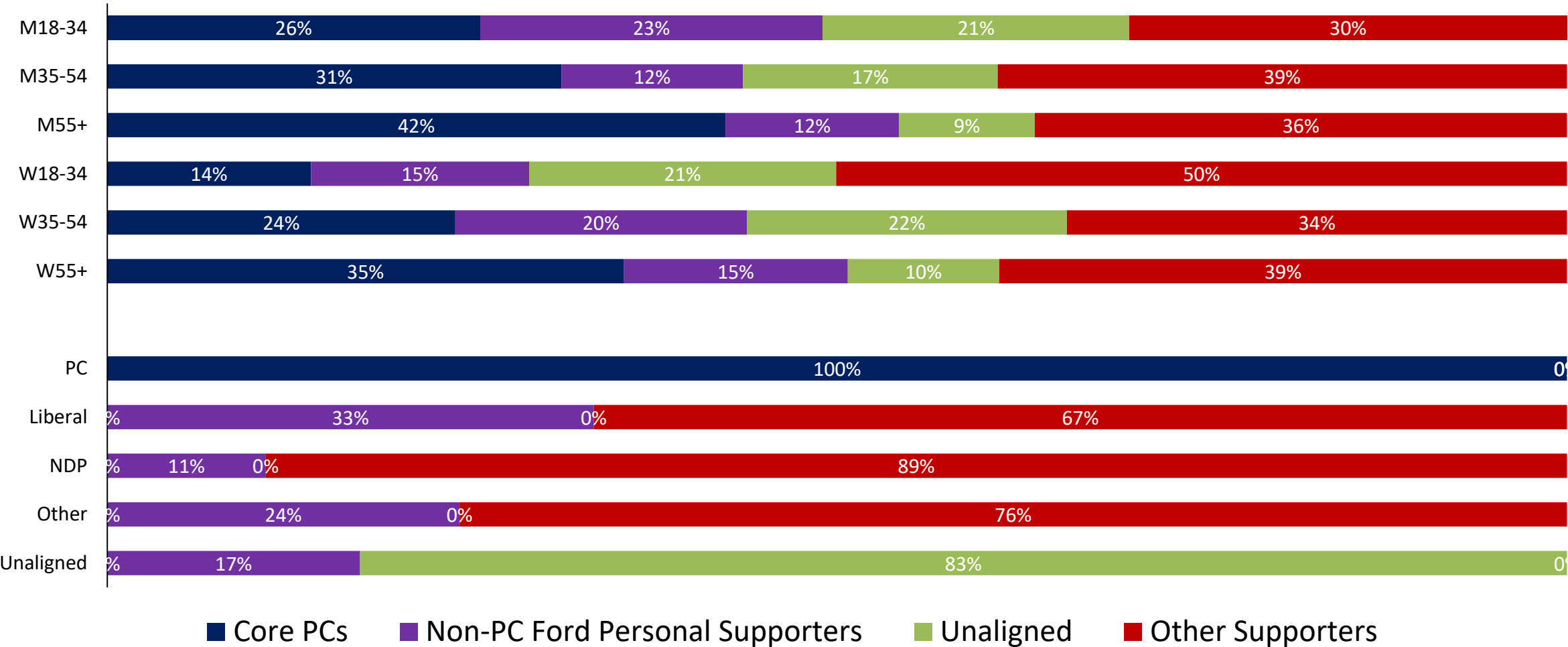Impression of Doug Ford BY Party ID

Segment	Description
Core PCs	Positive impression of Doug Ford and identify as a PC
Non-PC Ford Personal Supporters	Positive impression of Doug Ford and DO NOT identify as a PC
Unaligned	Unaligned and neutral or negative impression of Doug Ford
Other Supporters	Neutral or negative impression of Doug Ford and identify as a partisan for another party

Pie chart:
- Other Supporters 38%
- Core PCs 29%
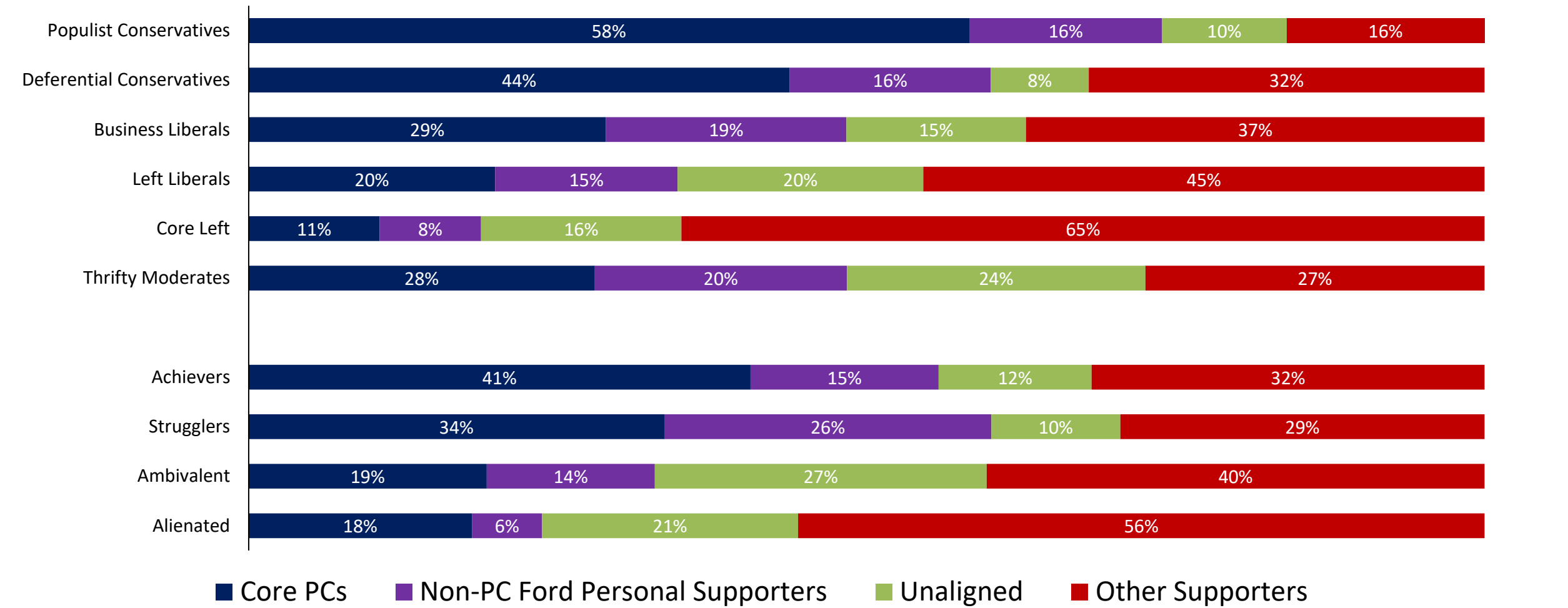- Non-PC Ford Personal Supporters 16%
- Unaligned, 17%

Ford Political Segmentation: Non-PC Ford supporters tend to be Liberal, younger men and mid-age cohort women

Ford Political Segmentation by *Demographics*

	Core PCs	Non-PC Ford Personal Supporters	Unaligned	Other Supporters
M18-34	26%	23%	21%	30%
M35-54	31%	12%	17%	39%
M55+	42%	12%	9%	36%
W18-34	14%	15%	21%	50%
W35-54	24%	20%	22%	34%
W55+	35%	15%	10%	39%
PC	100%			0%
Liberal	0%	33%	0%	67%
NDP	0%	11%	0%	89%
Other	0%	24%	0%	76%
Unaligned	0%	17%	83%	0%

■ Core PCs ■ Non-PC Ford Personal Supporters ■ Unaligned ■ Other Supporters

Ford Political Segmentation: Strugglers and Business Liberals are most likely to be Non-PC Ford supporters

Ford Political Segmentation by *Psychographics*

Segment	Core PCs	Non-PC Ford Personal Supporters	Unaligned	Other Supporters
Populist Conservatives	58%	16%	10%	16%
Deferential Conservatives	44%	16%	8%	32%
Business Liberals	29%	19%	15%	37%
Left Liberals	20%	15%	20%	45%
Core Left	11%	8%	16%	65%
Thrifty Moderates	28%	20%	24%	27%
Achievers	41%	15%	12%	32%
Strugglers	34%	26%	10%	29%
Ambivalent	19%	14%	27%	40%
Alienated	18%	6%	21%	56%

■ Core PCs ■ Non-PC Ford Personal Supporters ■ Unaligned ■ Other Supporters

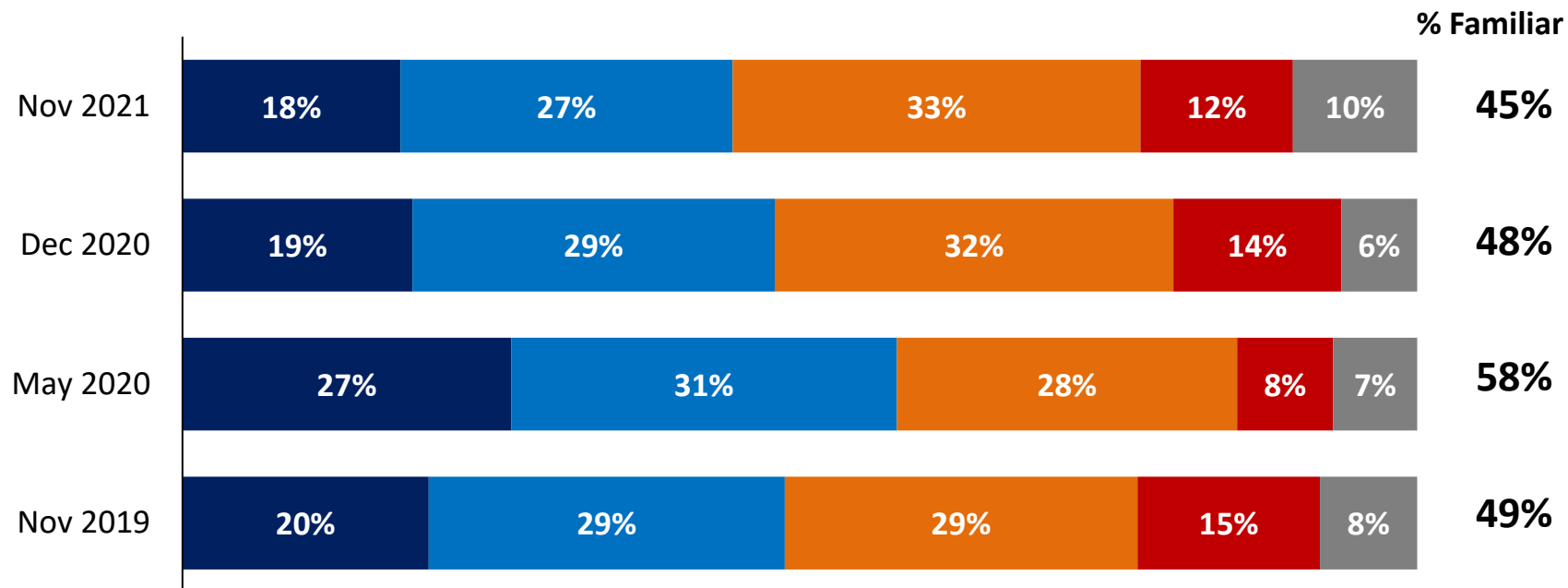# … but what about Electricity and Climate Change

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When we talk about "Energy Transition", few people know what we are talking about

Q One issue people have been talking about lately is the idea that Canada and the world may be transitioning from its current energy system that depends highly on carbon-based fossil fuels like coal, oil and gas to a lower-carbon energy system.

How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?
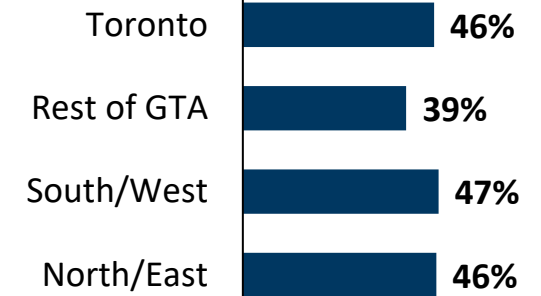[asked of all respondents n=1,000]

% Familiar

Period	I understand the details	I am familiar	I have heard of the idea	I have not heard	Don't know	% Familiar
Nov 2021	18%	27%	33%	12%	10%	**45%**
Dec 2020	19%	29%	32%	14%	6%	**48%**
May 2020	27%	31%	28%	8%	7%	**58%**
Nov 2019	20%	29%	29%	15%	8%	**49%**

- ■ I understand the details and can explain them to others
- ■ I am familiar with the idea of an energy transition but cannot explain it to others
- ■ I have heard of the idea of an energy transition but I don't know the details
- ■ I have not heard about the idea of an energy transition before this survey
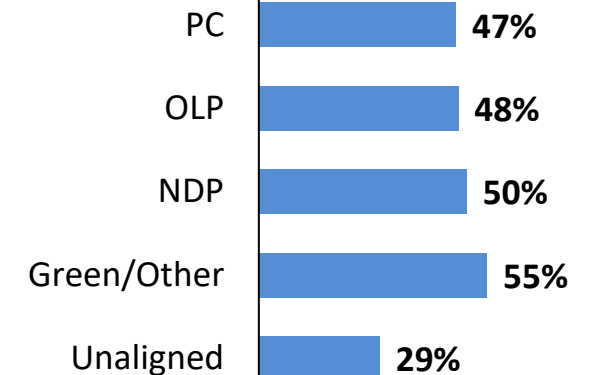- ■ Don't know

Sample Breakdown (current wave)
Those who say they "familiar"

Region

Toronto	**46%**
Rest of GTA	**39%**
South/West	**47%**
North/East	**46%**

Party ID

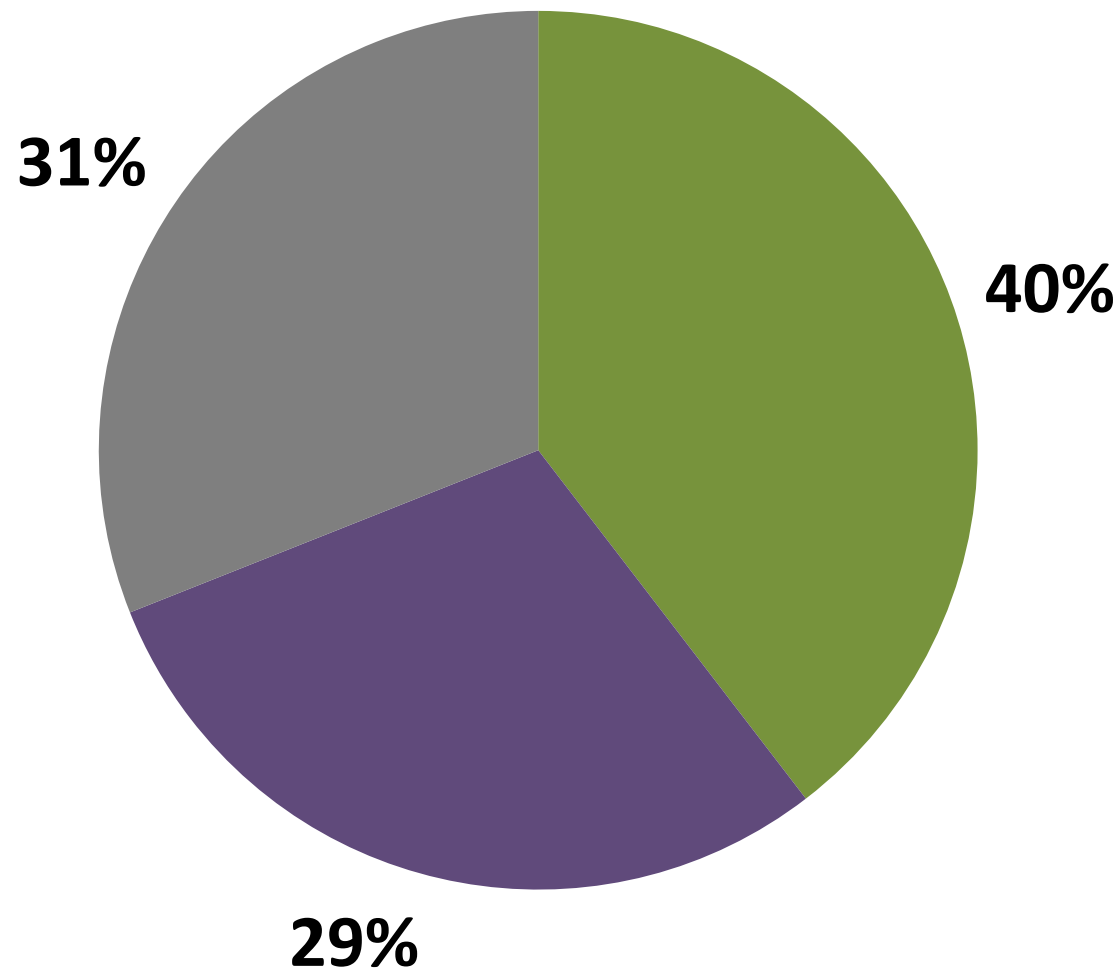|	
PC	**47%**
OLP	**48%**
NDP	**50%**
Green/Other	**55%**
Unaligned	**29%**

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Energy Transition: When explained, a plurality (40%) say transition policies help make the world better for future generations

Q Based on what you know about an energy transition, which of the following statements is closest to your point of view?
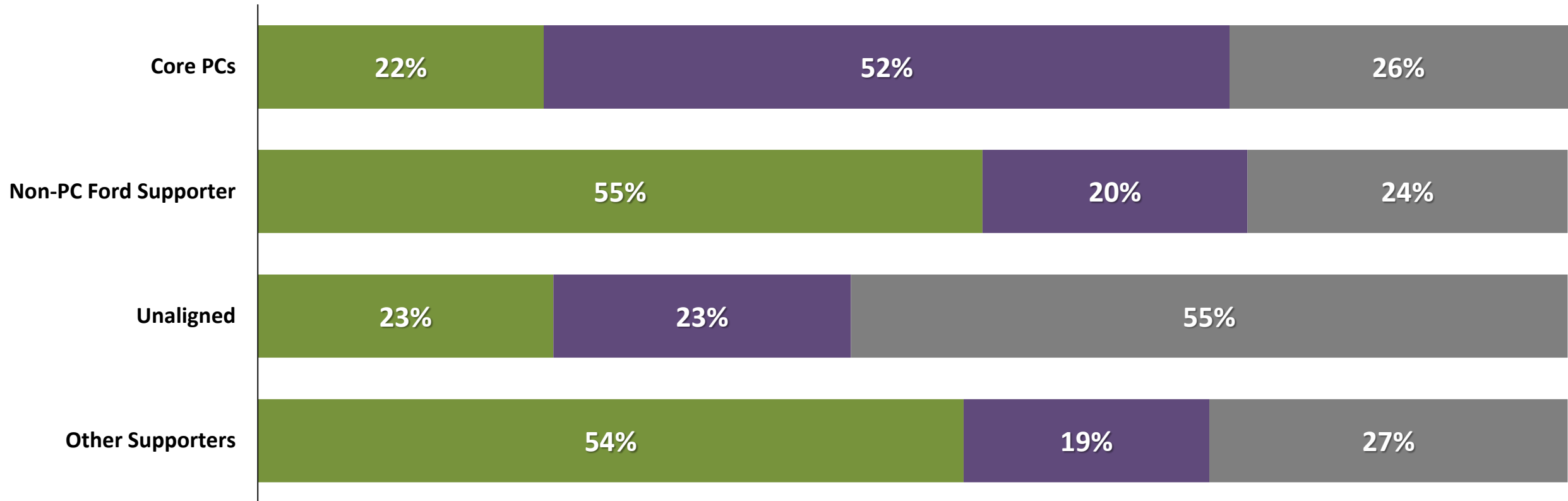[asked of all respondents; n=1,000]

- ■ Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.

- ■ Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren't likely to have a significant impact on climate change.

- ■ Don't know

40%

29%

31%

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Energy Transition: A majority of non-PC Ford supporters support an energy transition

Q Based on what you know about an energy transition, which of the following statements is closest to your point of view? By Segment
[asked of all respondents; n=1,000]

Segment	Accelerate transition (leader on climate)	Risk increasing cost of living	Don't know
Core PCs	22%	52%	26%
Non-PC Ford Supporter	55%	20%	24%
Unaligned	23%	23%	55%
Other Supporters	54%	19%	27%

■ Government policies to accelerate the transition away from oil and gas show Canada is a leader on climate change and help make the world better for future generations.

■ Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada, and aren't likely to have a significant impact on climate change.
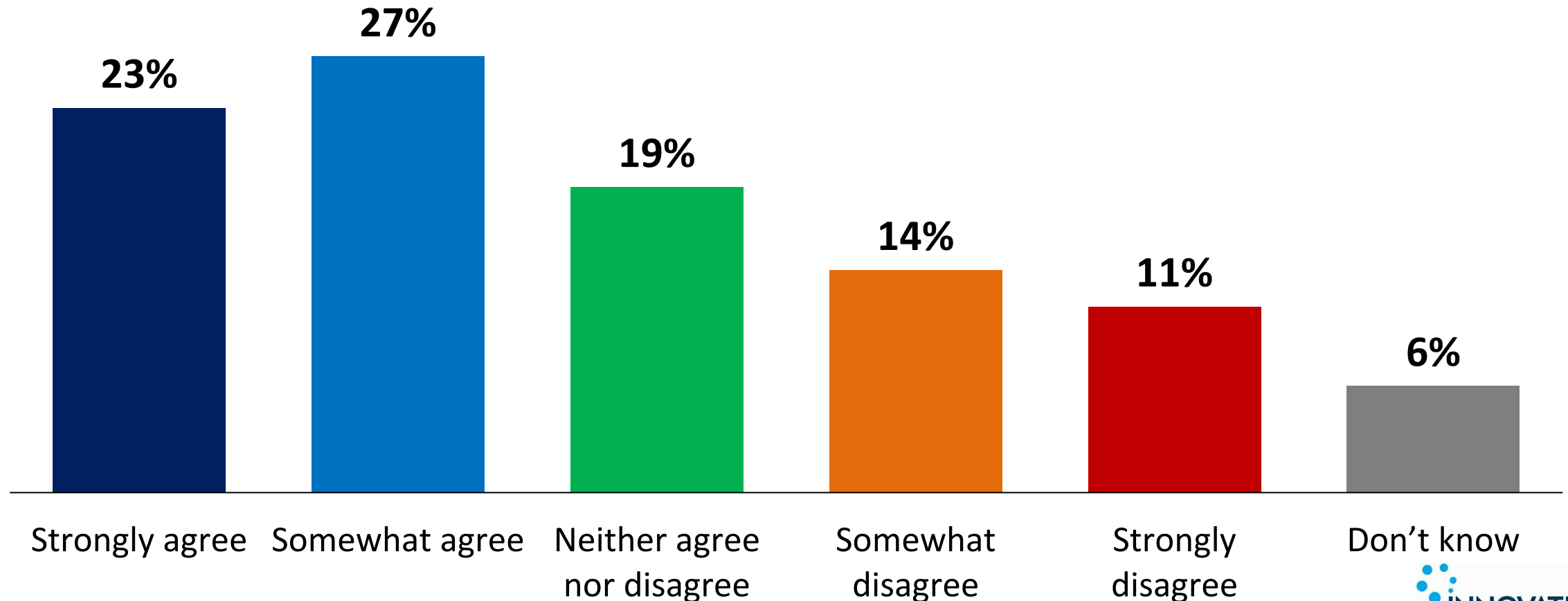
■ Don't know

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Quick Action: Half (50%) agree that we need to reduce greenhouse gas emissions as quickly as possible

Q Do you agree or disagree with the following statement:
We need to reduce greenhouse gas emissions from the energy we use as quickly as possible, even if it means job losses or paying more for energy.
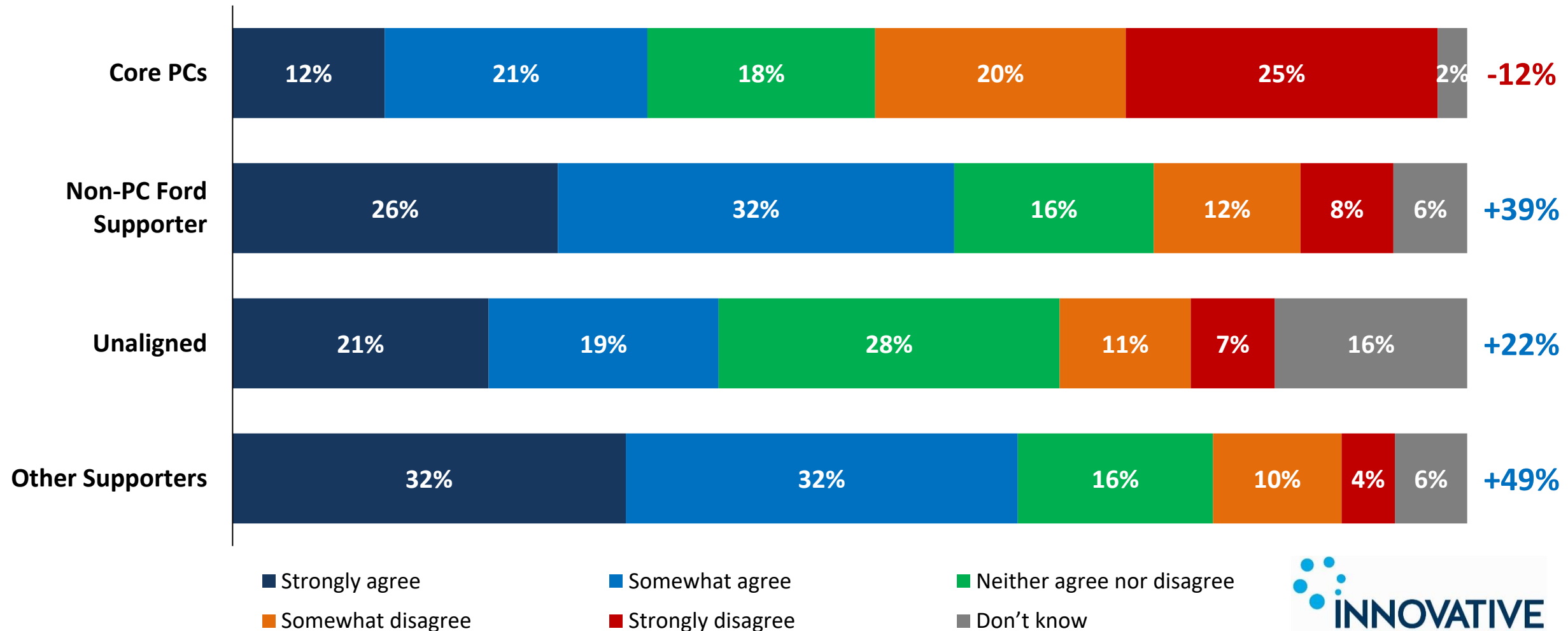[asked of all respondents; n=1,000]

Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
23%	27%	19%	14%	11%	6%

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Quick Action: Core PC voters split on quick climate change action, Non-PC Ford supporters embrace quick action

Q Do you agree or disagree with the following statement: *We need to reduce greenhouse gas emissions from the energy we use as quickly as possible, even if it means job losses or paying more for energy.* By Segment

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

Net Agree

Segment	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agree
Core PCs	12%	21%	18%	20%	25%	2%	**-12%**
Non-PC Ford Supporter	26%	32%	16%	12%	8%	6%	**+39%**
Unaligned	21%	19%	28%	11%	7%	16%	**+22%**
Other Supporters	32%	32%	16%	10%	4%	6%	**+49%**

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree
■ Somewhat disagree ■ Strongly disagree ■ Don't know

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Issues: The PCs need to switch channel from climate change to a less divisive issue

Q Now we are going to provide you with a list of issues. For each of these issues, please tell me which party you think would do a better job, or if you think none of the parties would do a good job on that issue. How about …. ?
[asked of all respondents; n=1,000]

Issue	PC	Liberal	NDP	Green	Another party	Would not vote/None/Nobody
Debt and the deficit	34%	17%	15%	3%	3%	27%
Jobs	30%	24%	18%	3%	3%	22%
The cost of living	27%	18%	23%	3%	3%	26%
Electricity	26%	19%	17%	8%	2%	29%
Health care	22%	26%	25%	2%	3%	22%
Education	21%	26%	21%	3%	4%	25%
Social issues	17%	22%	31%	4%	2%	24%
The environment	13%	19%	15%	30%	2%	21%
Indigenous issues	13%	22%	24%	6%	3%	32%

- ■ The Progressive Conservative Party
- ■ The Liberal Party
- ■ The New Democratic Party
- ■ The Green Party
- ■ Another party
- ■ Would not vote/None/Nobody

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To sum it up...

01

This is a critical juncture for the electricity sector.

Electricity players are reasonably well regarded at a time when they are a key part of the answer to one of the world's greatest problem.

02

The public sees climate change as real and is looking for answers.

While energy conservation and biofuels will be part of the answer, replacing fossil fuels with electricity will clearly be part of the answer.

03

The sector should not take support for energy transition for granted.

Many customers don't know the vocabulary of climate change and views are more conflicted than a shallow assessment would indicate

04

Election years always create vulnerabilities.

This election is up for grabs. All three major parties can see paths to victory. Be careful not to create a hook for the PCs and NDP to revisit the past perceived sins of the previous Liberal governments

05

The good news is that it makes no sense for any party to oppose energy transition.

Not only are NDP and Liberals coalitions strongly supportive of climate action, Doug Ford's personal vote is also supportive. However, because the transition divides the PC-base, their best road forward is to put the issue behind them and turn the channel to better wedge issues

Online Methodology

These are the results of an online survey conducted between November 4th and 17th, 2021.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, a leading provider of online sample. 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 Ontario population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=1411 Ontario residents, 18 years or older. The results are weighted to n=1000 based on Census data from Statistics Canada.

Field Dates: November 4th to 17th, 2021.

Weighting: Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	124	8.8%	142	14.3%
Men 35-54	233	16.6%	166	16.7%
Men 55+	288	20.5%	167	16.8%
Women 18-34	190	13.5%	147	14.8%
Women 35-54	262	18.6%	178	18%
Women 55+	310	22%	193	19.5%
Toronto	393	27.9%	211	21.1%
Rest of GTA	321	22.7%	261	26.1%
South/West	315	22.3%	257	25.7%
North/East	382	27.1%	271	27.1%

Phone Methodology

These are the results of a telephone survey conducted between November 10th and 30th.

Method: This survey was conducted by telephone among 615 randomly-selected Ontario residents who are Canadian citizens, 18 years of age and older. 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.

Sample Size: n=615 Ontario residents, 18 years or older. The results are weighted to n=600 based on Census data from Statistics Canada.

Field Dates: November 4th to 17th, 2021.

Weighting: Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: The margin of error for a sample of n=600 is approximately +/-4.0% (before April 2003: approximately +/-3.84%).

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	51	8.3%	83	13.8%
Men 35-54	91	14.8%	99	16.6%
Men 55+	162	26.3%	106	17.6%
Women 18-34	37	6%	82	13.7%
Women 35-54	76	12.4%	106	17.7%
Women 55+	196	31.9%	122	20.3%
Toronto	84	13.7%	125	20.8%
Rest of GTA	182	29.6%	156	26%
South/West	161	26.2%	155	25.8%
North/East	188	30.6%	165	27.4%

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