

Prepared by:

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Public Opinion Research ▶▶

# Ontario Politics & Power



CI Energy Group's

## Ontario Power

*Bringing Clarity to Ontario's Evolving Power Industry Landscape*



# Energy in Context

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## Industry Challenge:

- According to the Conference Board, an estimated \$300 billion in electricity infrastructure investments is required in Canada between now and 2030, both to meet growing electricity demand and to replace aging infrastructure.
- Almost a third of this electricity infrastructure investment is required in Ontario.

## Barriers:

- Progress in meeting Ontario's electricity infrastructure requirements is increasingly being obstructed by:
  - distrust of industry, government and regulators
  - scrutiny of the Feed-in Tariff (FIT) program and Green Energy Act
  - local NIMBY activism
  - concerns surrounding price

# Online Polling Methodology

These are the findings of five Ontario online polls using INNOVATIVE's Canada 20/20 national research panel.

Dates	Ontario Sample Sizes
<b>April 2014</b> (April 8-14)	n=800
<b>March 2014</b> (March 21-26)	n=1,017
<b>January 2014</b> (Jan 17-24)	n=1,138
<b>October 2013</b> (NIMBY Poll)	n=846
<b>October 2012</b> (NIMBY Poll)	n=959

The surveys have been weighted to ensure that the overall sample's composition reflects the actual age, gender and regional distribution of Ontario's population according to 2011 Statistics Canada Census.

**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.*

# The Political Scene

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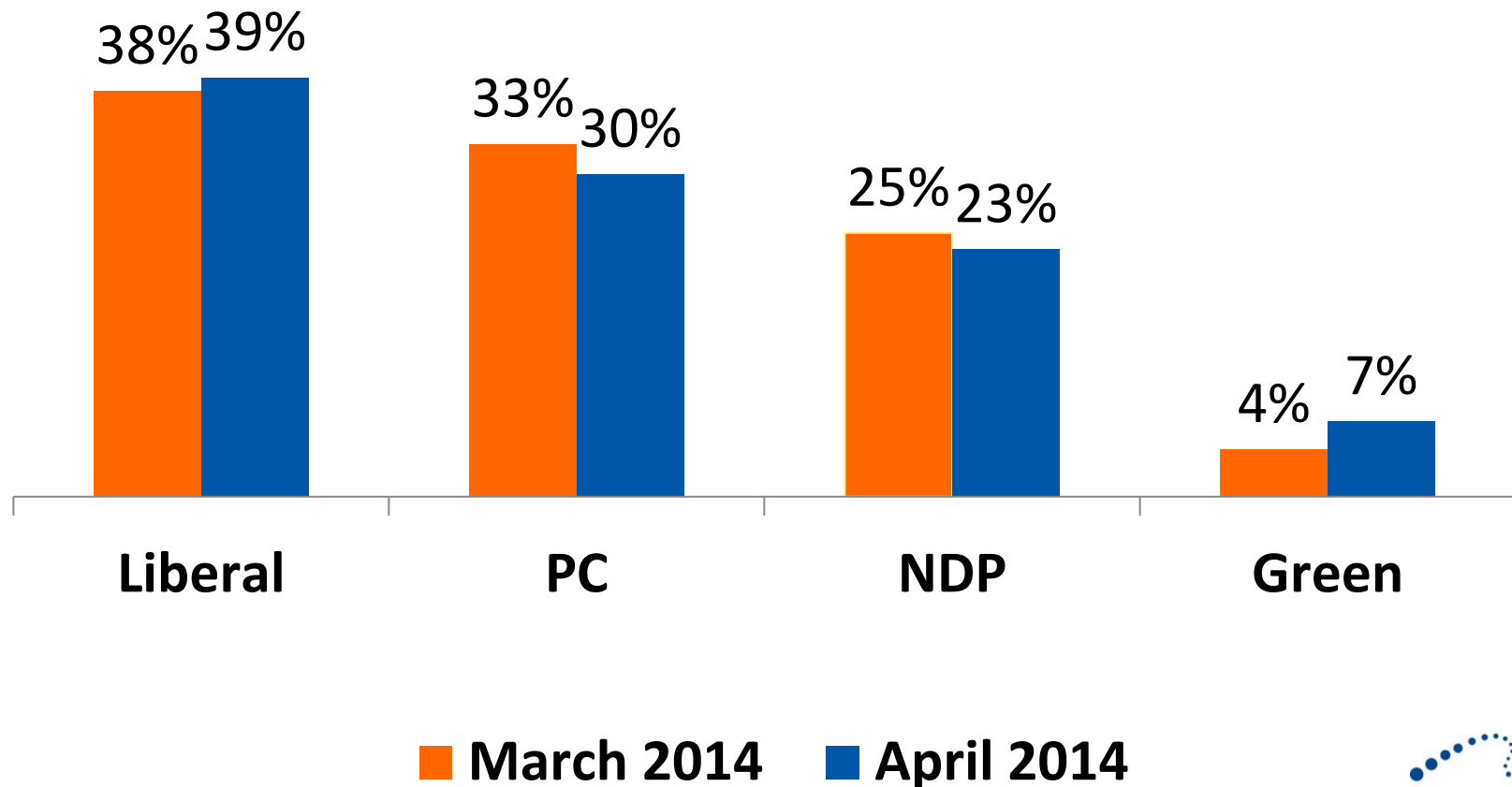


# Police Investigation: No significant impact on Liberal vote since the police investigation

Q

If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party?

[Provincial Decided Vote]



# RSH about Police Investigation: Two thirds of Ontario have heard of police investigation

**Q** Have you read, seen or heard anything about a police investigation into the possible deletion of government records from computers in the Premier's office during the transition from Dalton McGuinty to Kathleen Wynne?

[Asked of all respondents, n- 800]

	Liberal	PC	NDP	Green	Undecided	Total
Yes	68%	<b>85%</b>	55%	64%	52%	<b>67%</b>
No	30%	13%	38%	28%	43%	<b>29%</b>
Don't Know	2%	2%	7%	9%	6%	<b>4%</b>

# Who's to Blame: Liberals see issue as McGuinty's, while others see it as a shared issue with Wynne

Q

Do you think this police investigation is primarily an issue about Dalton McGuinty's behaviour as Premier, Kathleen Wynne's behavior as Premier, or something that involves both of them?

[Asked of respondents, n= 535]

	Liberal	PC	NDP	Green	Undecided	Total
Dalton McGuinty	<b>66%</b>	9%	33%	31%	32%	36%
Kathleen Wynne	2%	5%	1%	0%	2%	3%
Both	15%	<b>82%</b>	<b>61%</b>	<b>55%</b>	<b>51%</b>	<b>51%</b>
Neither	10%	1%	4%	14%	2%	5%
Don't know	8%	3%	2%	0%	13%	5%

# Liberals no change or rally, Tories rage, while NDP cool to Liberals

Q

Are you more or less likely to vote for Kathleen Wynne and the Ontario Liberals as a result of this issue?

[Asked of respondents who heard about the police investigation, n= 535]

	Liberal	PC	NDP	Green	Undecided	Total
<b>A lot more likely to vote Liberal</b>	13%	1%	0%	7%	0%	5%
<b>Somewhat more likely to vote Liberal</b>	13%	1%	5%	0%	2%	6%
<b>Neither</b>	<b>66%</b>	11%	<b>44%</b>	<b>48%</b>	31%	39%
<b>Somewhat less likely to vote Liberal</b>	8%	5%	16%	28%	15%	10%
<b>A lot less likely to vote Liberal</b>	0%	<b>81%</b>	<b>34%</b>	17%	<b>40%</b>	38%
<b>Don't know</b>	2%	2%	1%	0%	13%	3%



# Ontario Power Sector

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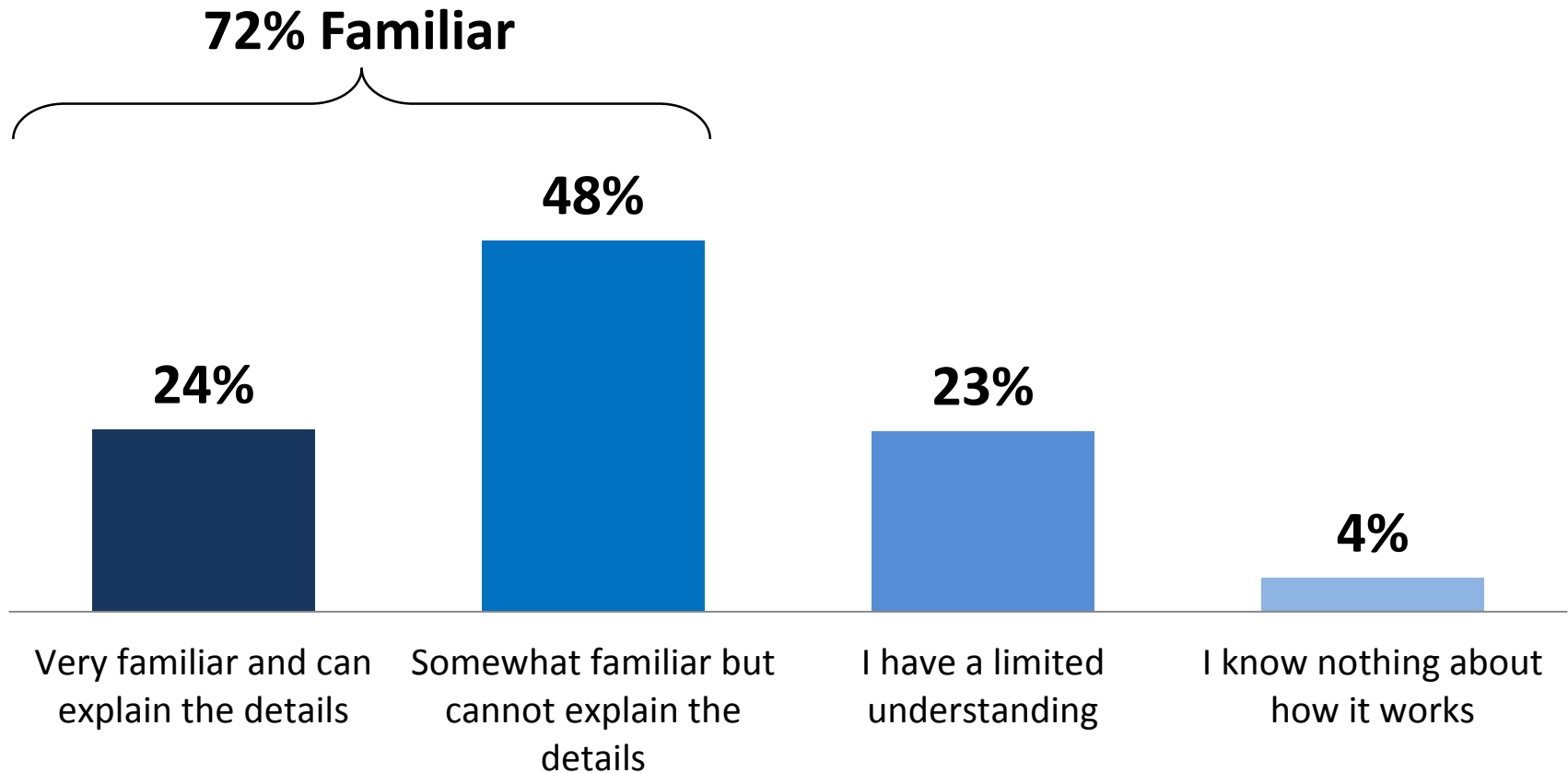
# Familiarity with how electricity system works:

## Few claim detailed knowledge, most are bluffing



In general, how familiar are you with the way Ontario's electricity system works?

[asked only if they receive an electricity bill and if they are the person responsible for paying the electricity bill; n=818]



**Note:** 'Don't know' (0%) not shown

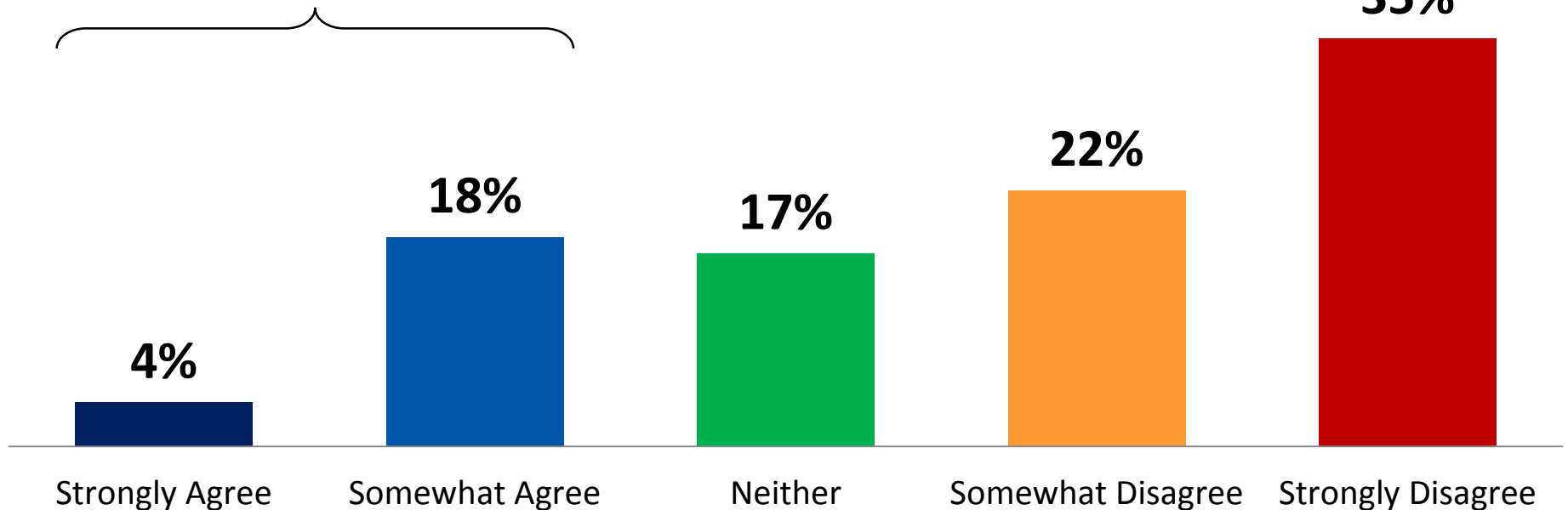
# Consumer Protection: 3-in-5 don't think consumers are well protected with respect to prices and reliability

Q Do you agree or disagree with the following statement?

***Consumers are well protected with respect to prices and the reliability and quality of electricity service in Ontario.***

22% Agree

57% Disagree



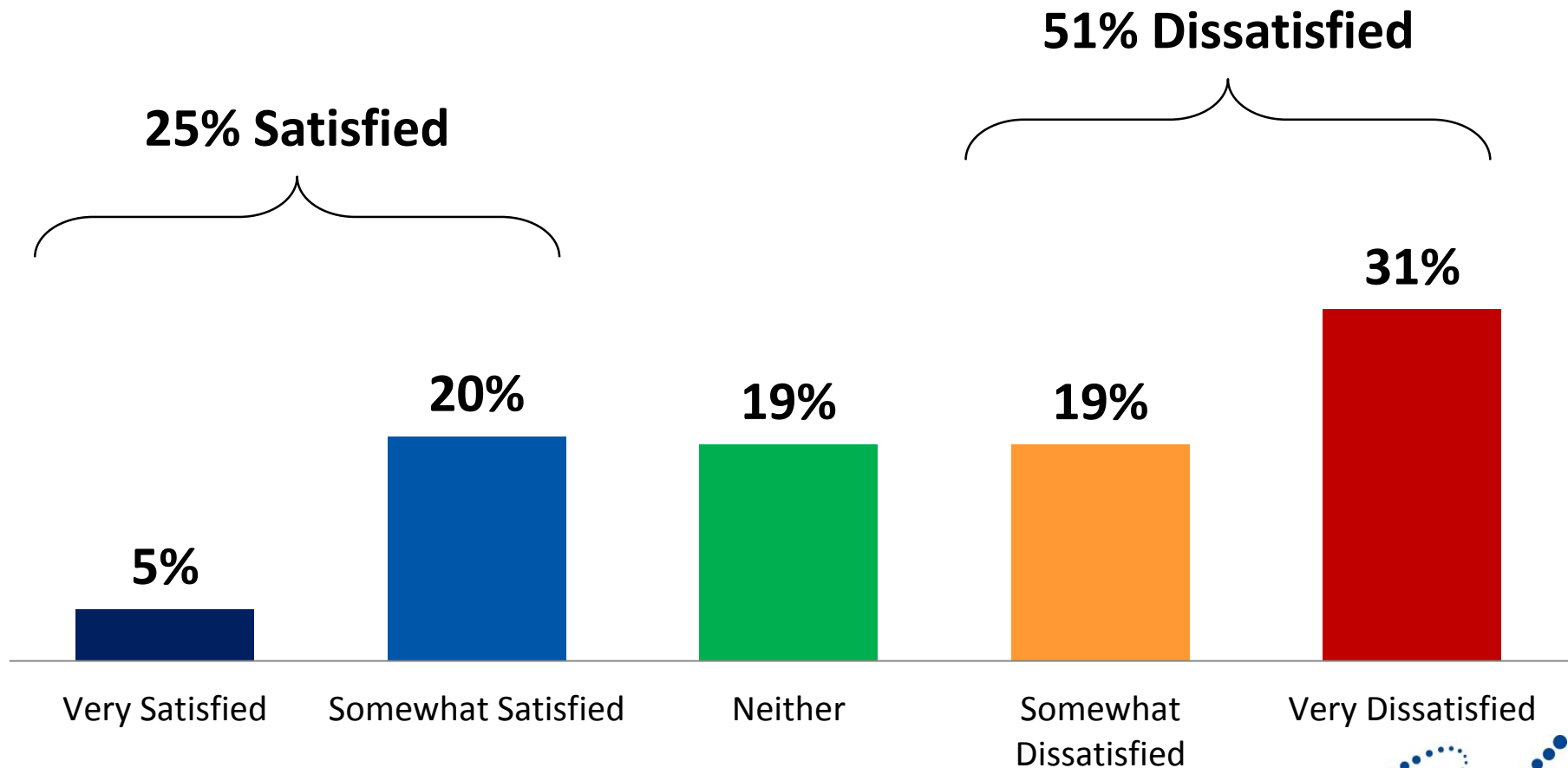
Note: 'Don't know' (4%) not shown

# Satisfaction with Gov't Electricity Management:

## Over half (51%) are dissatisfied with gov't job

Q

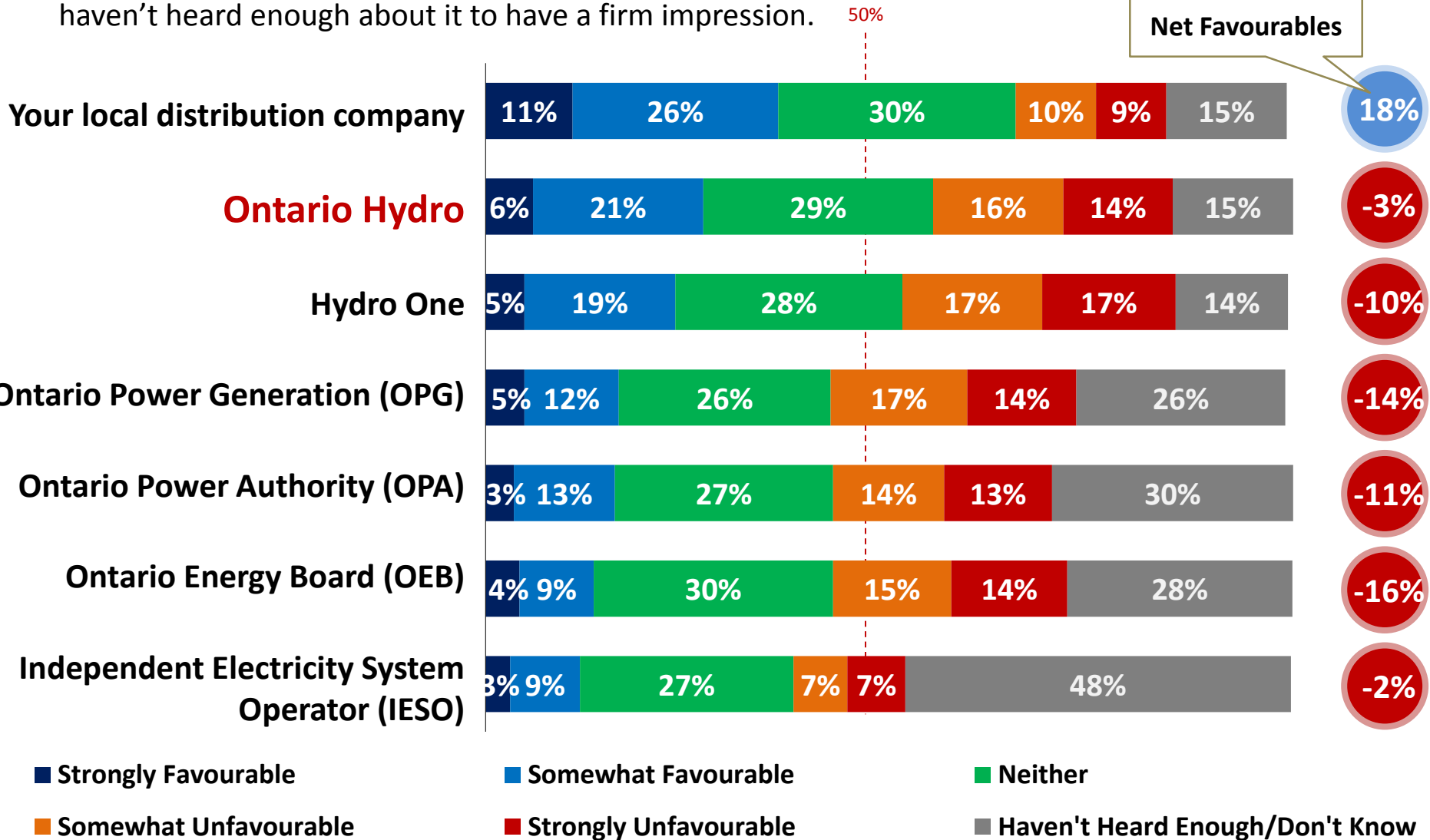
How satisfied are you with the job the Ontario government is doing to manage the electricity system?



Note: 'Don't know' (5%) not shown

# Impressions of Electricity Sector Players:

Below is a list of organizations that play a role in the province's electricity system. For each organization, please indicate whether you have a favourable or unfavourable impression or if you haven't heard enough about it to have a firm impression.

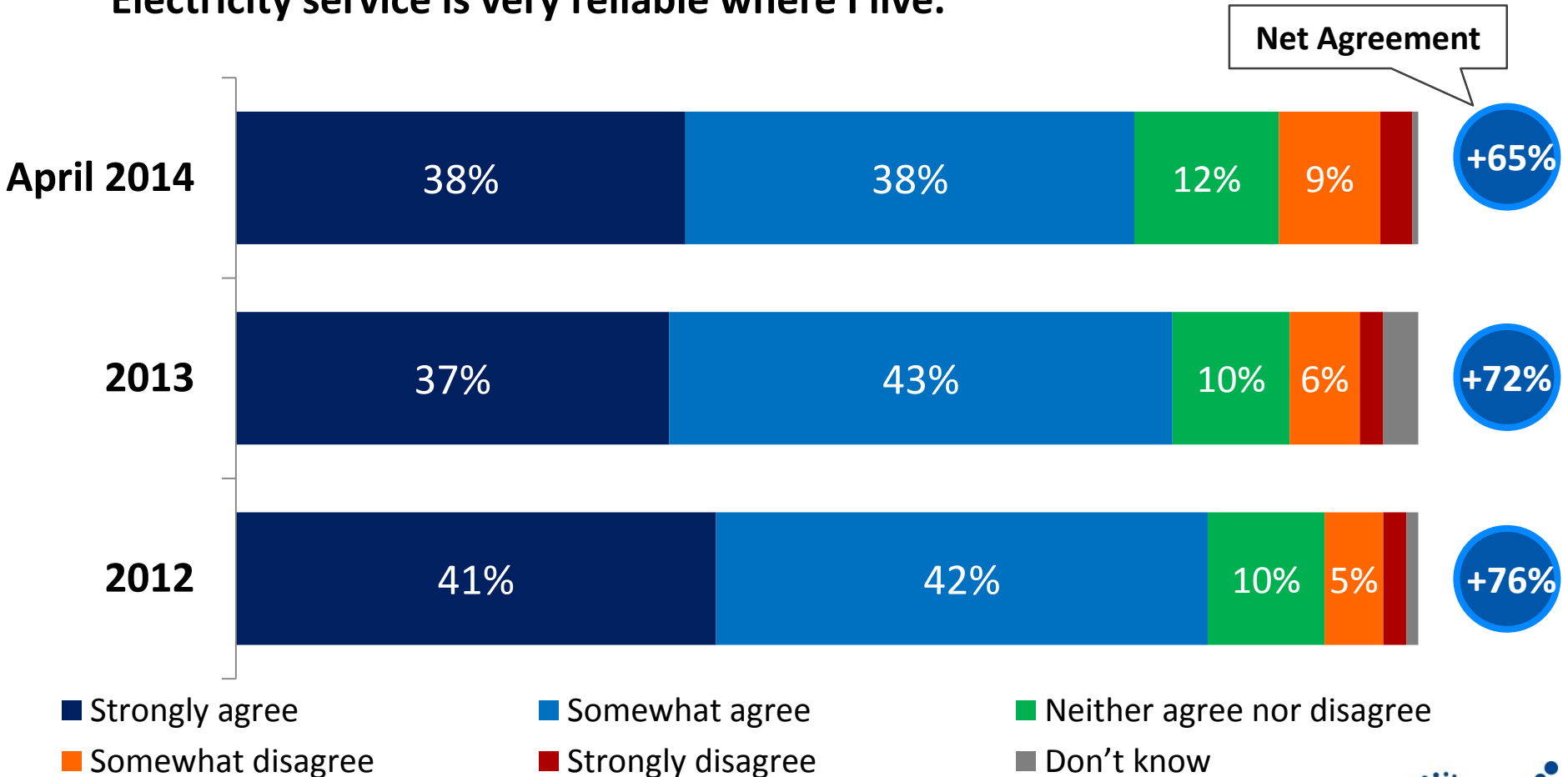


# 3-in-4 (76%) agree service is reliable in Ontario

Q

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

**Electricity service is very reliable where I live.**

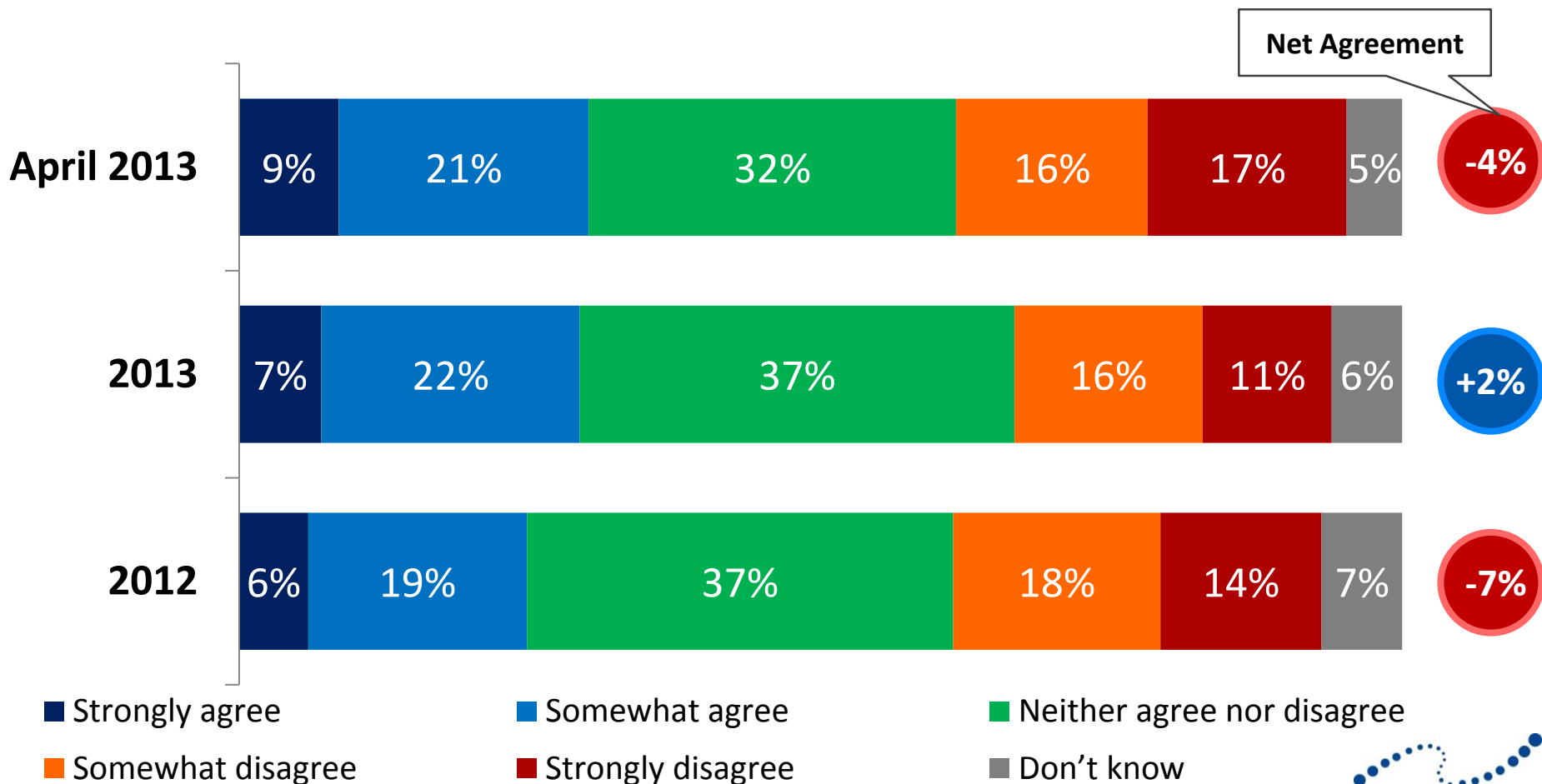


# 3-in-10 feel electrical companies treat them as valued customer



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

**The electricity companies I deal with treat me like a valued customer.**

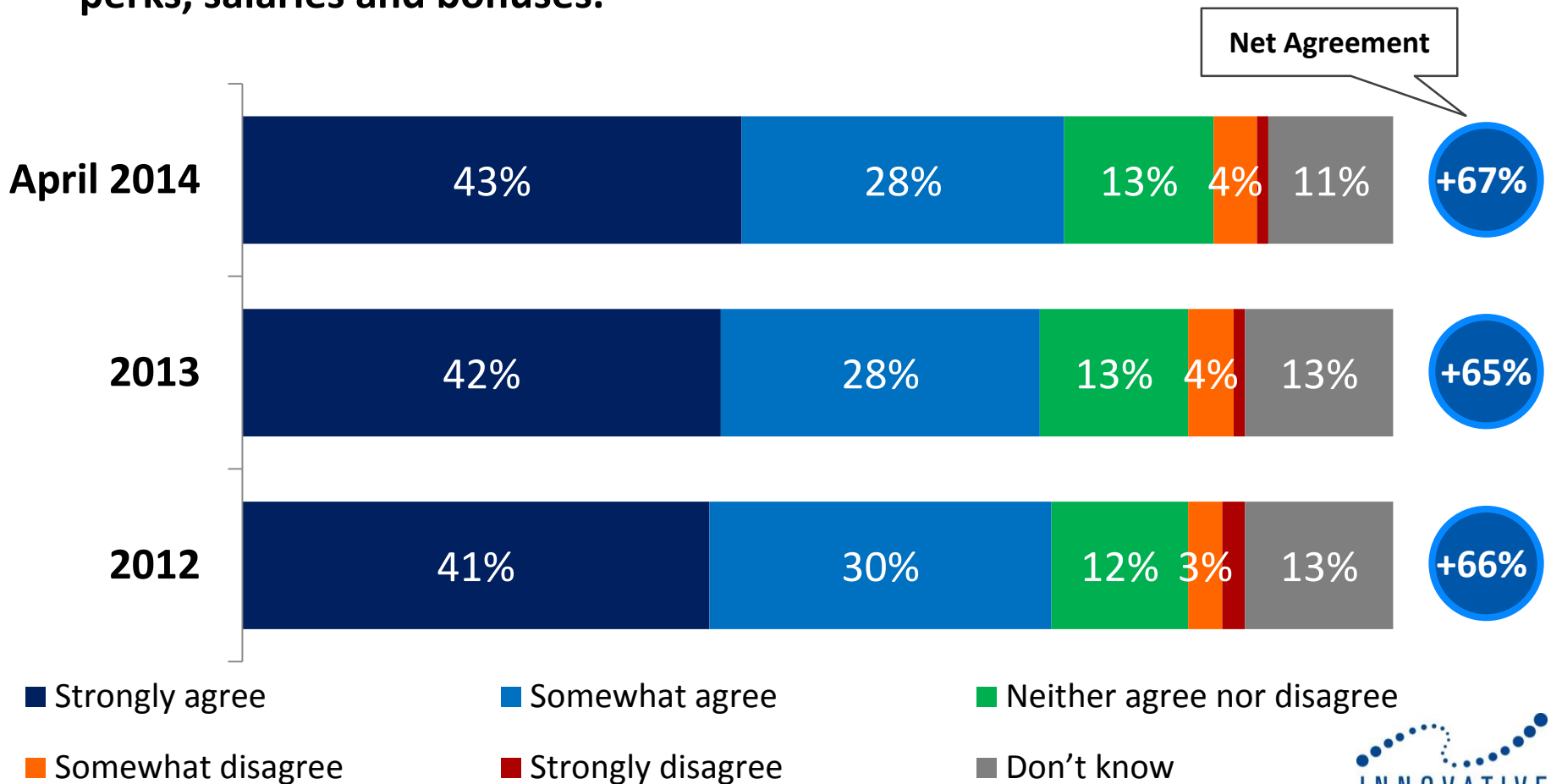


# 7-in-10 still agree perks out of line

Q

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

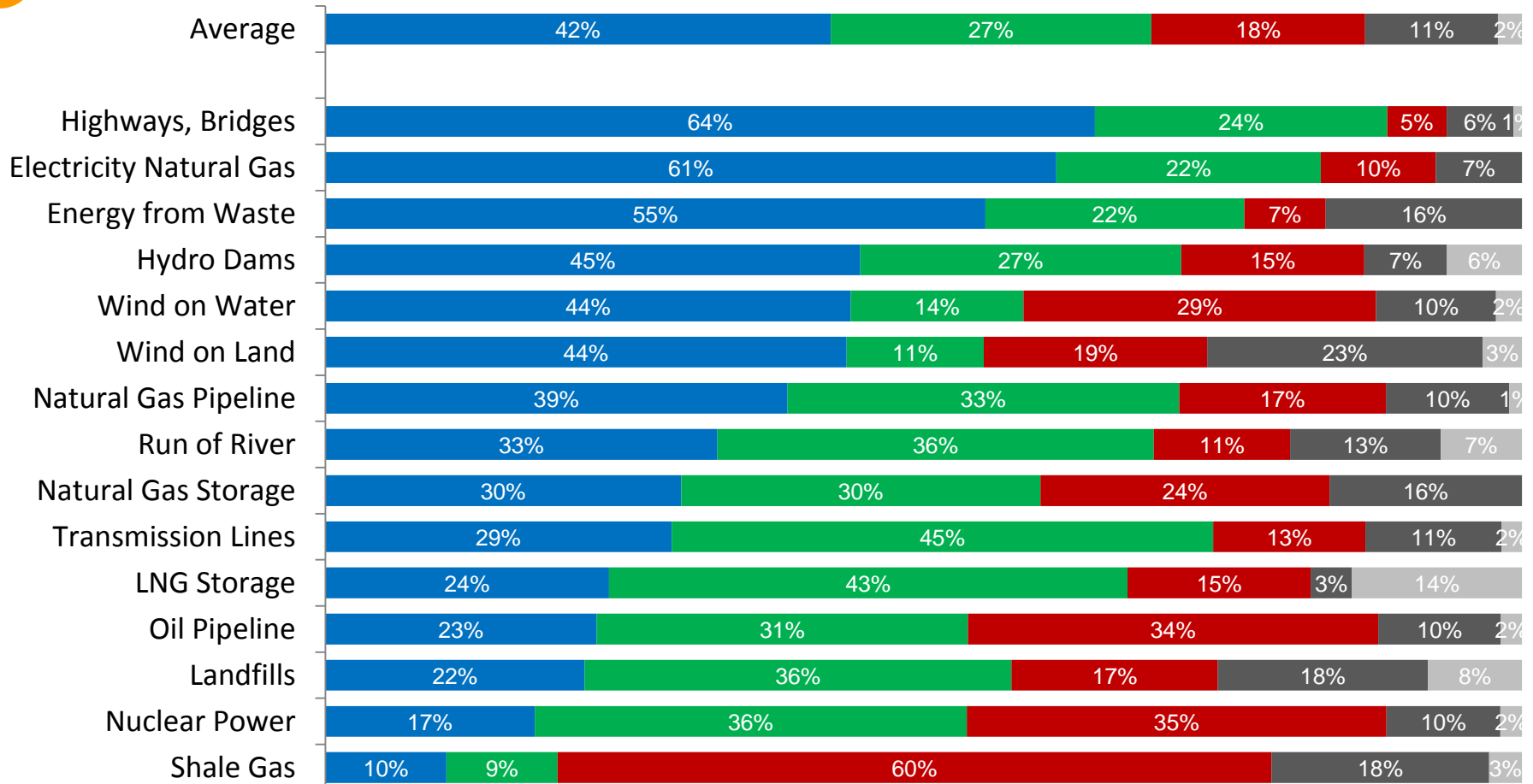
**Electricity companies in this province waste too much money on outrageous perks, salaries and bonuses.**





# Community Support: Not as bad as one might think

Q Which of the following best represents your view of that project?



■ It's a good thing for the community and I support it

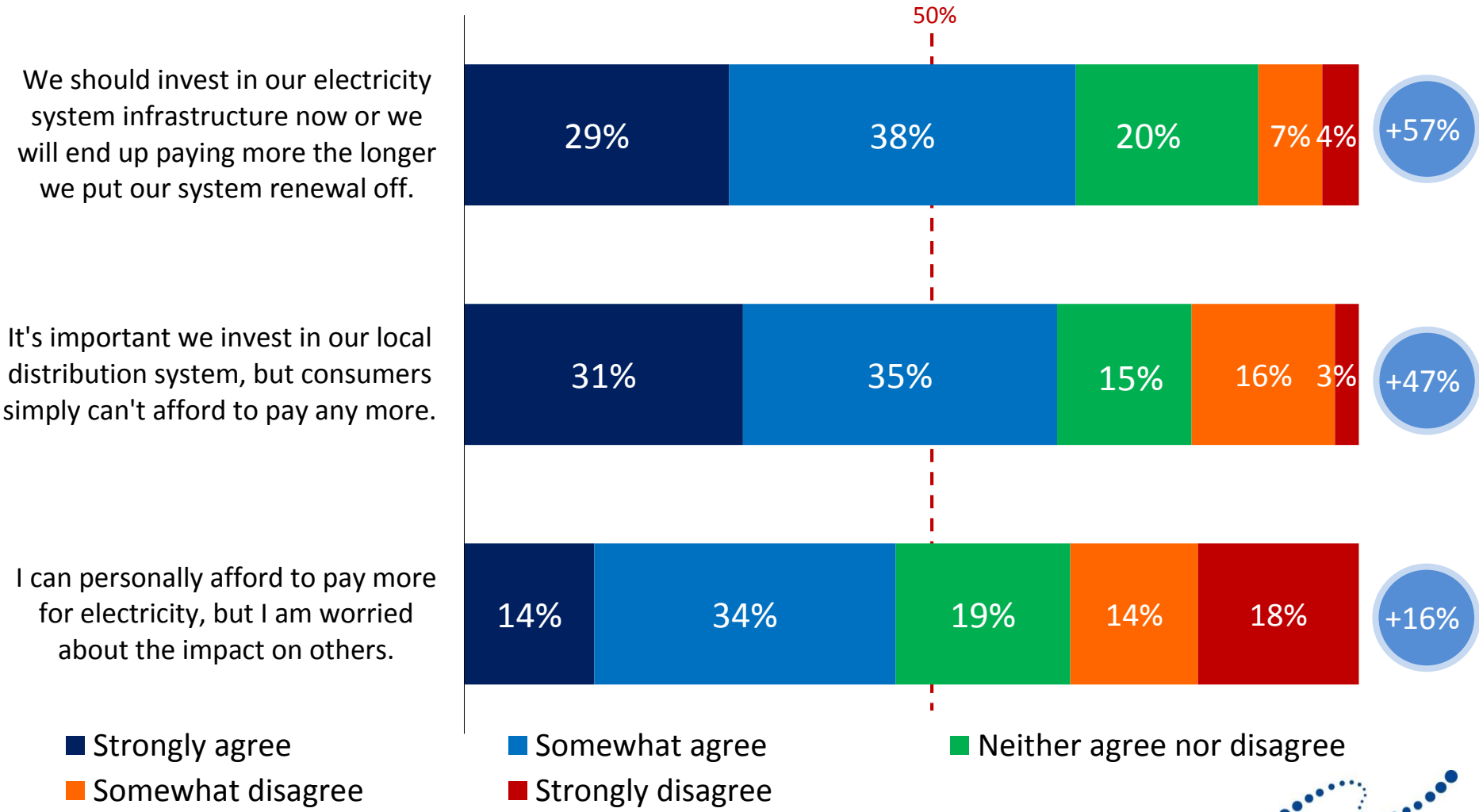
■ I don't like it but I think it is necessary

■ It's a bad thing for the community and I oppose it

■ I don't feel I know enough to judge this project

# Conflicted on Price: 67% ratepayer say they can't afford to pay more; while 48% worry about others

**Q** For each of the following statements please indicate if you agree or disagree?  
 [split sample; n=426]



**Note:** 'Don't Know' not shown



# How might Ontario's electricity sector navigate its politics?

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1. The electricity sector is often a political football across Canada, but it is particularly so here in Ontario today.
2. As a political issue, it is not the “whats” that matter as much as the “whos” and “whys”.
  - The key “**what**” risk is that politicians will deny the realities of the system, as they have in the past.
  - Politicians will use electricity as a means of connecting with voters, and showing them that the politician is on the voters side.
  - Making a rational case is necessary, but not sufficient. To connect with voters and politicians, you must speak to **motive** and **who** benefits ... *or loses by lack of action.*



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