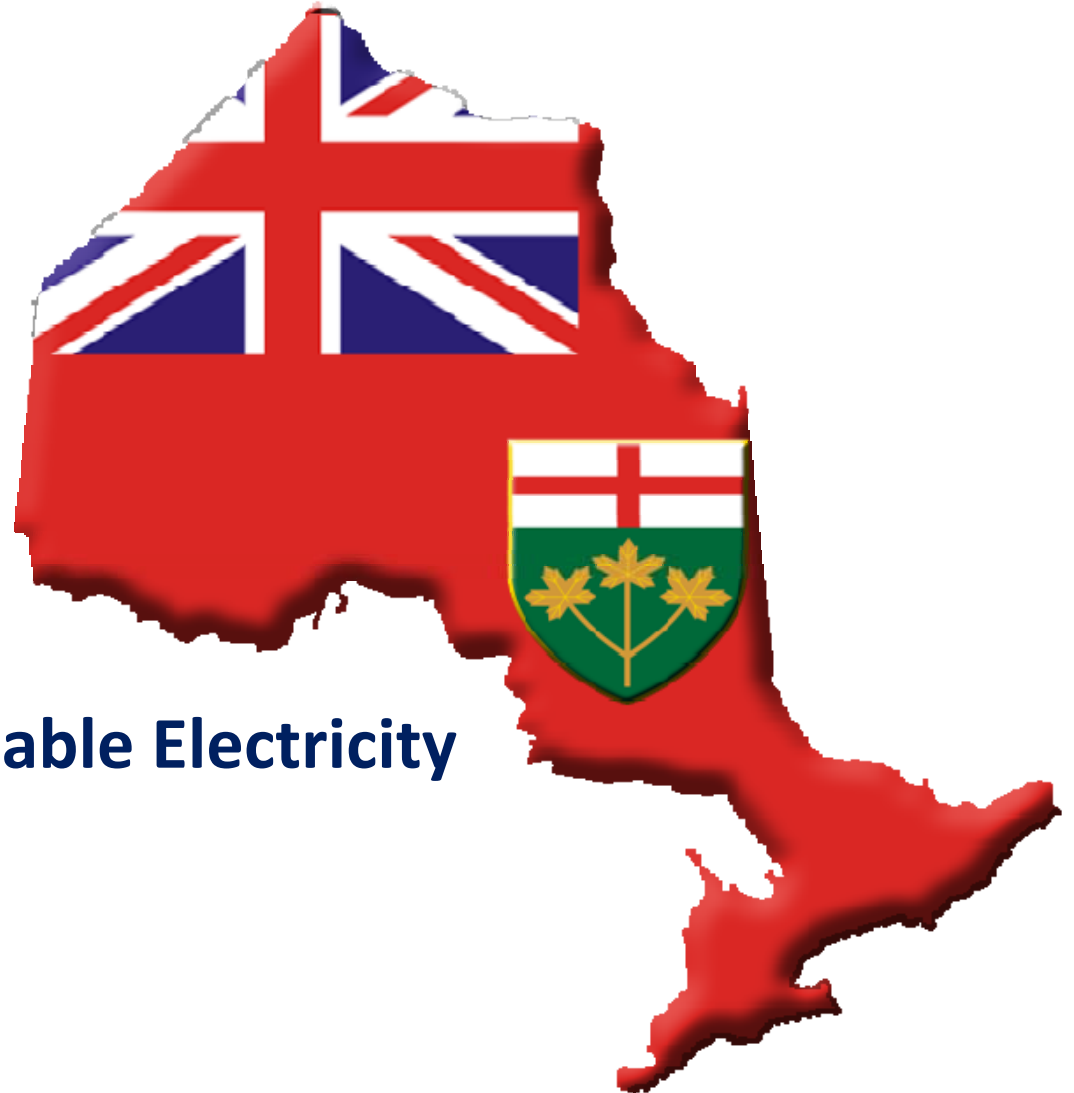




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Council for Clean and Reliable Electricity

Darrell Bricker, PhD

CEO, Ipsos Global Public Affairs



Setting the Context

This country, she's a-changin'... Think about it:

- **90%** of this country's population is governed by **female premiers**.
- **By 2015**, there will be **more over the age of 65** than under the age of 15.
- **49.9%** of the population living in Canada's largest city, **Toronto**, was **not born in Canada**.
- **Ontario**, the place where William G. Davis said "Bland Works", now has one of the **only openly gay leaders** for a population of almost 13 million...in the world.



What We'll Examine

1. Ontario Political Landscape
2. The Economy
3. Attitudes on Energy and the Environment
 - a. Nuclear Energy
 - b. Oil and Gas
 - c. Wind Power

What Happened on Election Day, 2011

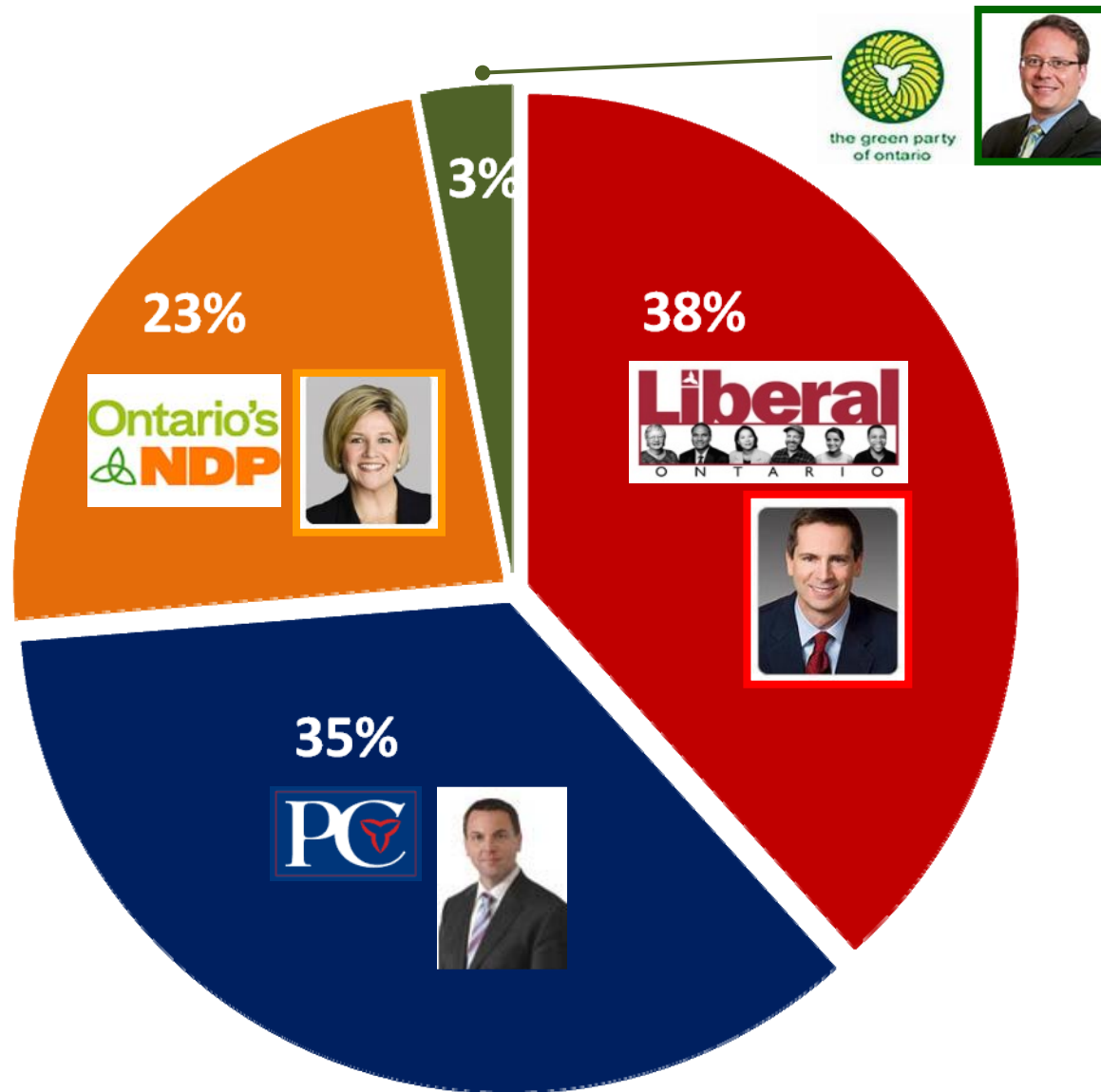


Setting the Context

- If some consultant tells you that there's no way Ontarians will elect a gay female from Toronto as Premier, tell them that speeches, campaigns and alternatives to that voter choice matters. Remind them that with all the baggage Dalton McGuinty had, the Conservatives squandered a 10 point lead in the last election and today stand as a rural rump.
- Tell them that Andrea Horwath is closing in on the other leaders as being chosen as the best "premier material"...but that's because she's nice and affable, not because voters know what she and her party stand for, or that the Teachers Unions, the Labour Unions, and Syd Ryan, and the Public Service Alliance are her best friends.
- Tim Hudak, who ran a “south of the border” Republican party election campaign last time, and, despite his public contrition for a miscalculated effort and a promise to do different next election, seems heck bent to repeat it: angry and putting the old Mike Harris "Welfare" lightening rods up again, his Party holds the traditional, rural, right of centre voters that form the core of the Conservative vote – some 28% of the vote and not much more.

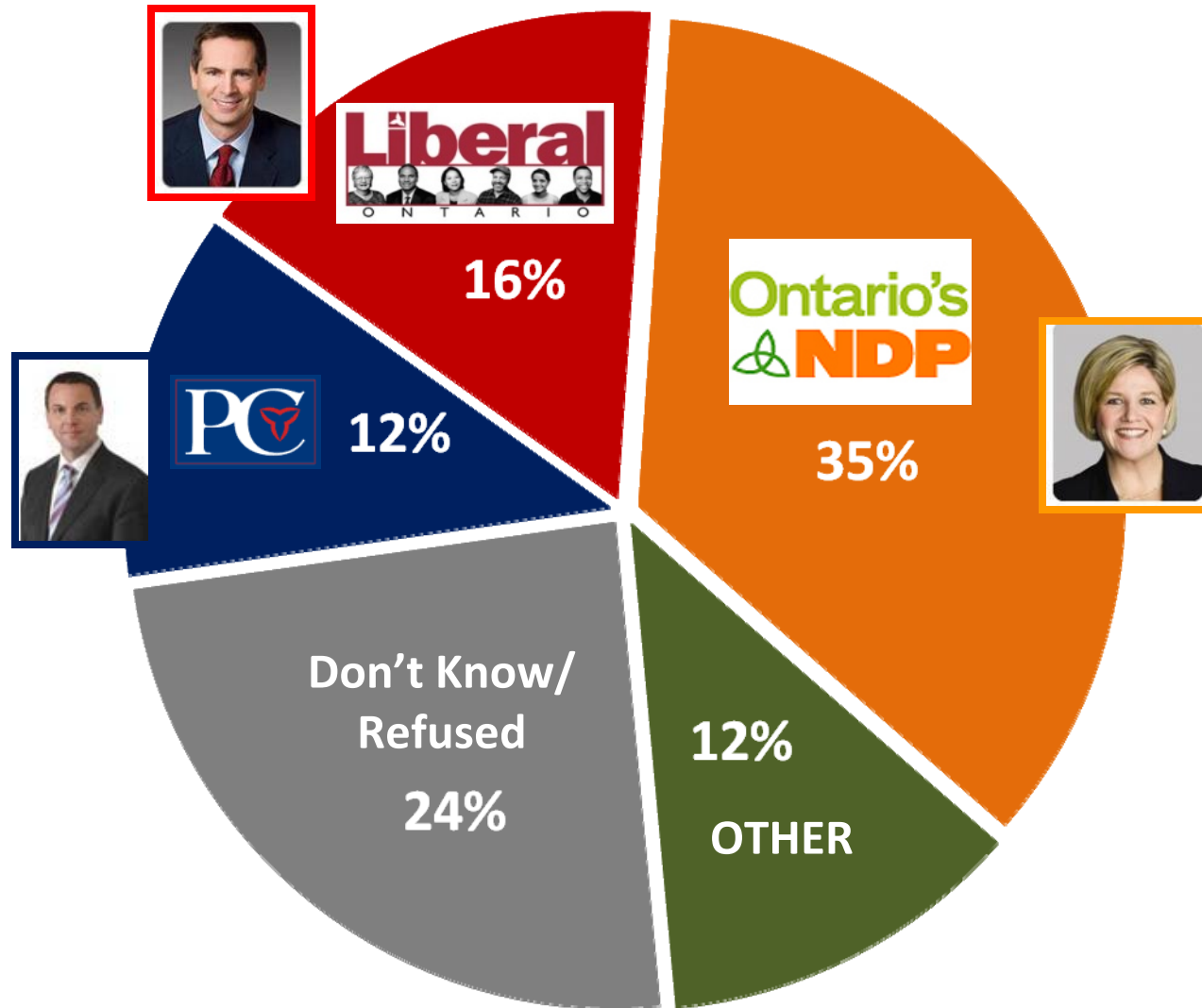


OVERALL RESULTS of the Ontario Election in October 2011





2ND CHOICE PARTY CANDIDATE – Potential for Horwath



Ontario Provincial Elections 2011 (EXIT POLL)
2A. And which of the following parties' candidate was your second choice?
Base: Respondents who have voted n=8303

Issues and the Edge



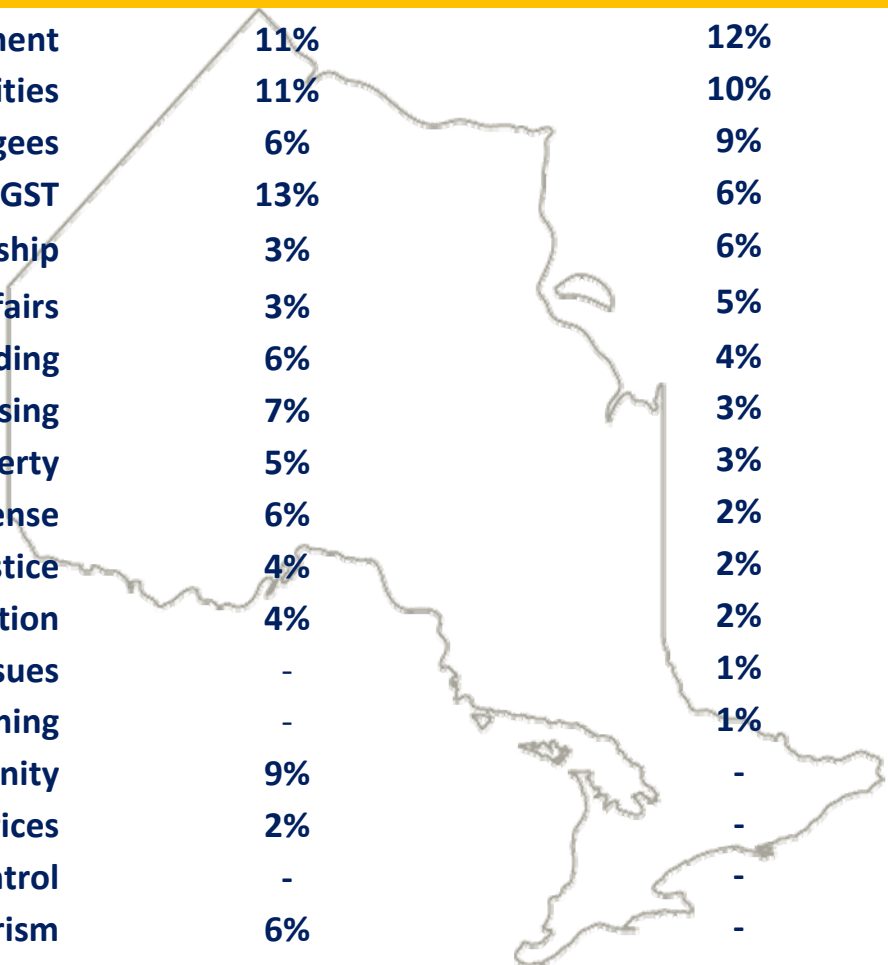
Ontario Top Concerns

JULY 2011

NOVEMBER 2012



	JULY 2011	NOVEMBER 2012
Economy (General)	32%	34%
Jobs/Unemployment	21%	27%
Healthcare/Medicare	38%	23%
NET: Environment	11%	12%
Education/Schools/Universities	11%	10%
Immigration/Refugees	6%	9%
Taxes/Tax Reform/GST	13%	6%
Government/Politics/Political Leadership	3%	6%
NET: International Affairs	3%	5%
Deficit/Debt/Government Spending	6%	4%
Social Services - Pensions, Daycare, Housing	7%	3%
Poverty	5%	3%
Armed Forces/Military/Defense	6%	2%
NET: Crime/Justice	4%	2%
Seniors/Aging Population	4%	2%
Aboriginals/Native Issues	-	1%
Agriculture/Farming	-	1%
NET: National Unity	9%	-
Oil/ Gas Prices	2%	-
Gun Control	-	-
NET: Terrorism	6%	-

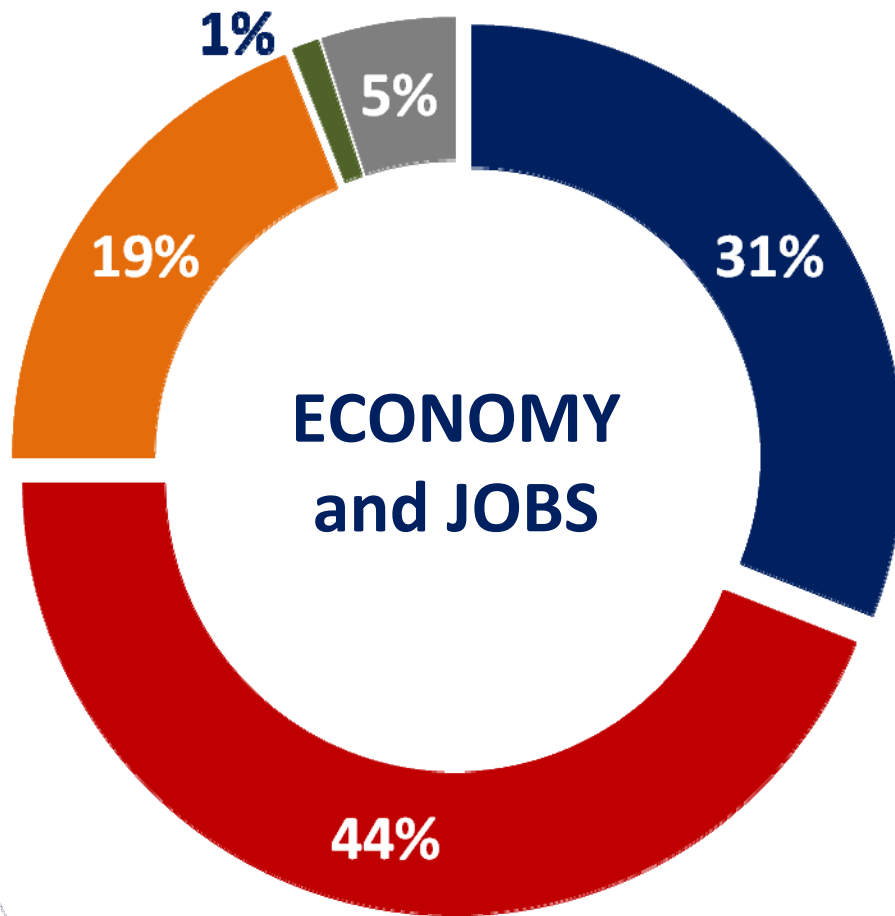


1a/b. Thinking of the issues presently facing Canada, which one do you feel should receive the greatest attention from Canada's leaders ?
Base: All Ontario Respondents - Total Mentions n=400



ECONOMY AND JOBS

Which Party Leader do you think is best suited to handle that issue



- PC
- Liberal
- NDP
- Other
- Don't Know/Not Sure

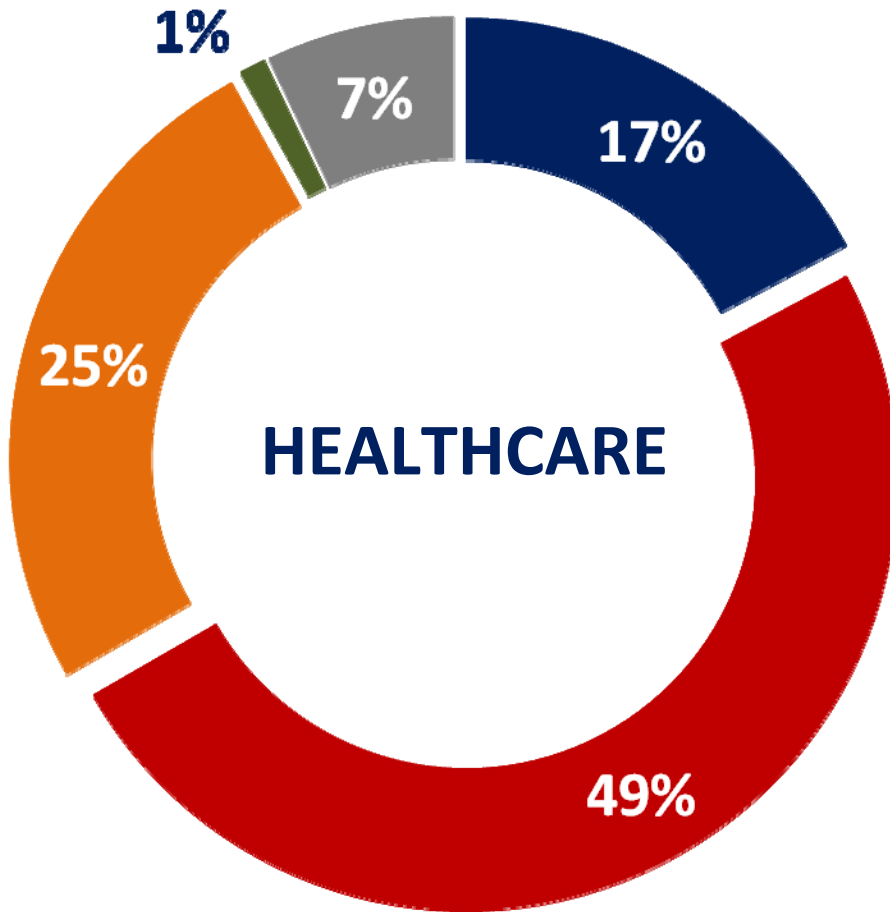


Ontario Provincial Elections 2011 (EXIT POLL)
17. And which Party Leader do you think is best suited to handle that issue
Base: Respondents who specified this issue n= 2599



HEALTHCARE

Which Party Leader do you think is best suited to handle that issue



- PC
- Liberal
- NDP
- Other
- Don't Know/Not Sure

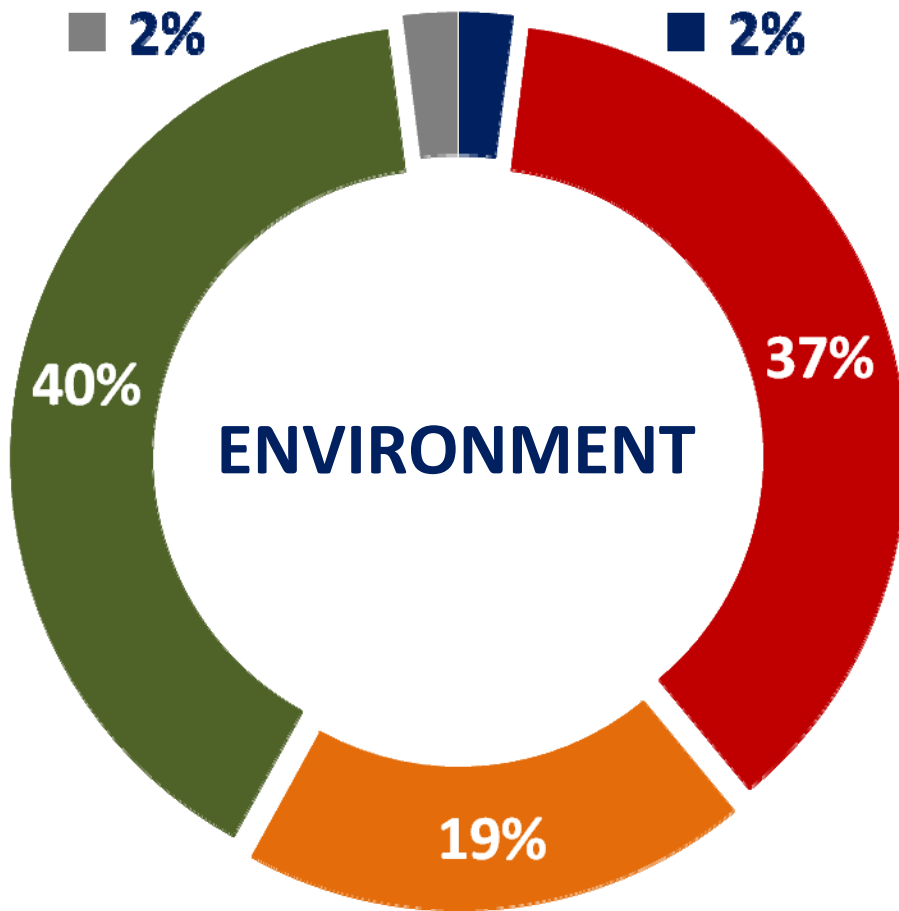


Ontario Provincial Elections 2011 (EXIT POLL)
17. And which Party Leader do you think is best suited to handle that issue
Base: Respondents who specified this issue n= 1467

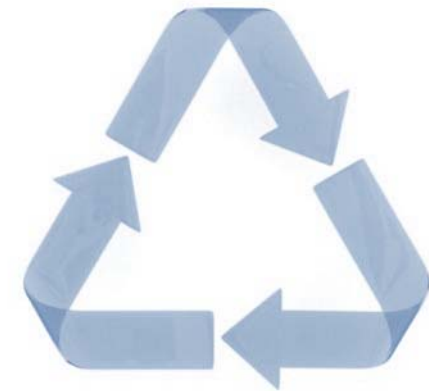


ENVIRONMENT

Which Party Leader do you think is best suited to handle that issue



- PC
- Liberal
- NDP
- Other
- Don't Know/Not Sure

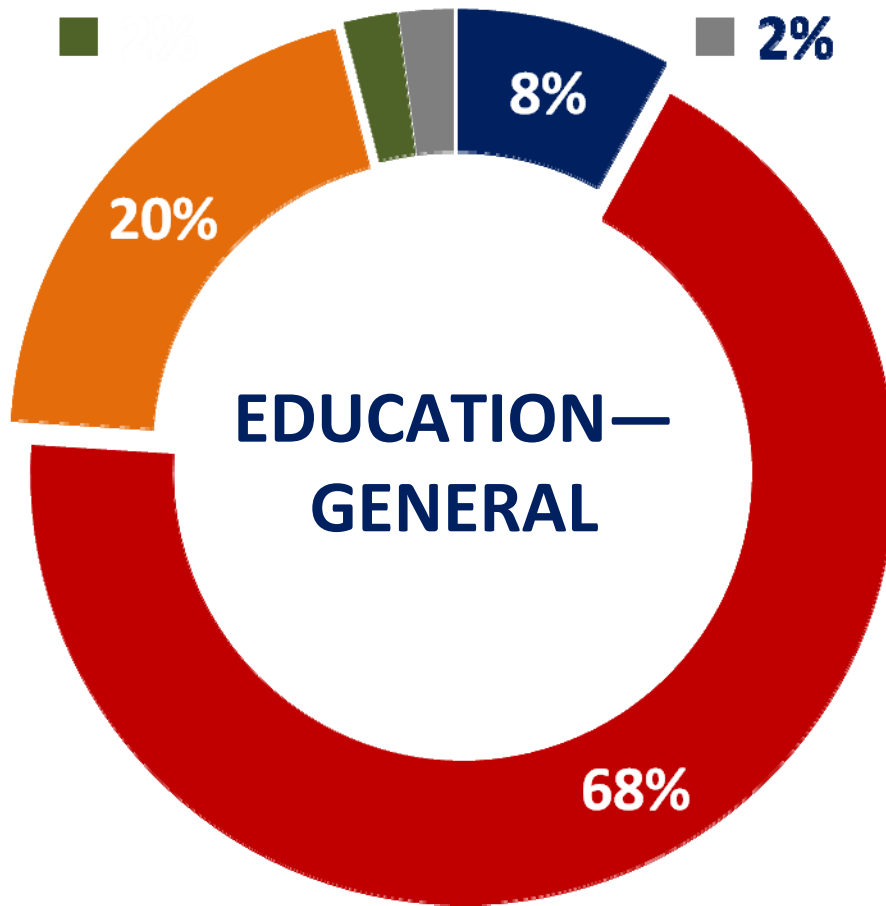


Ontario Provincial Elections 2011 (EXIT POLL)
17. And which Party Leader do you think is best suited to handle that issue
Base: Respondents who specified this issue n= 171



EDUCATION—GENERAL

Which Party Leader do you think is best suited to handle that issue



- PC
- Liberal
- NDP
- Other
- Don't Know/Not Sure

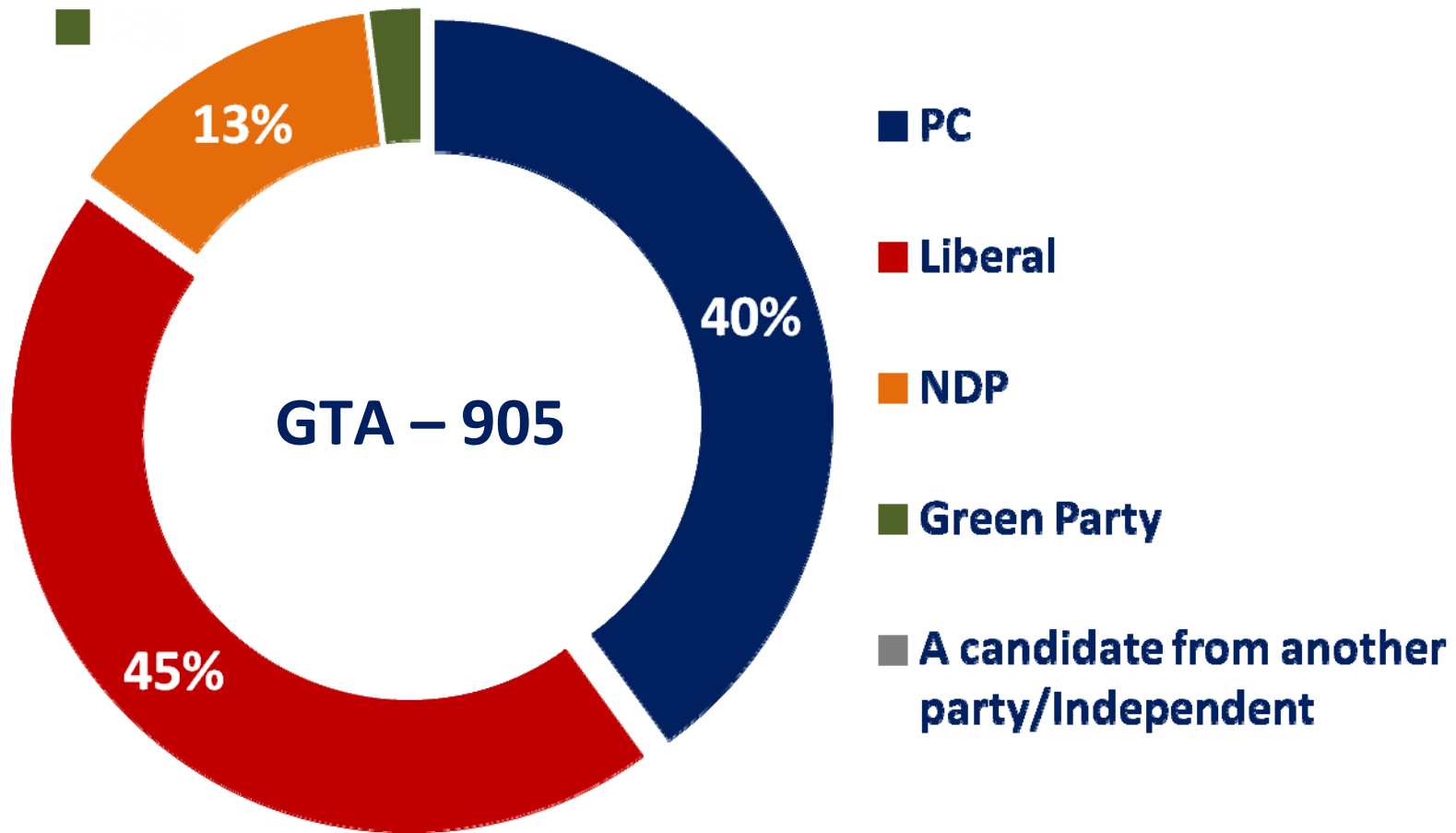


Ontario Provincial Elections 2011 (EXIT POLL)
17. And which Party Leader do you think is best suited to handle that issue
Base: Respondents who specified this issue n= 378

Battlegrounds



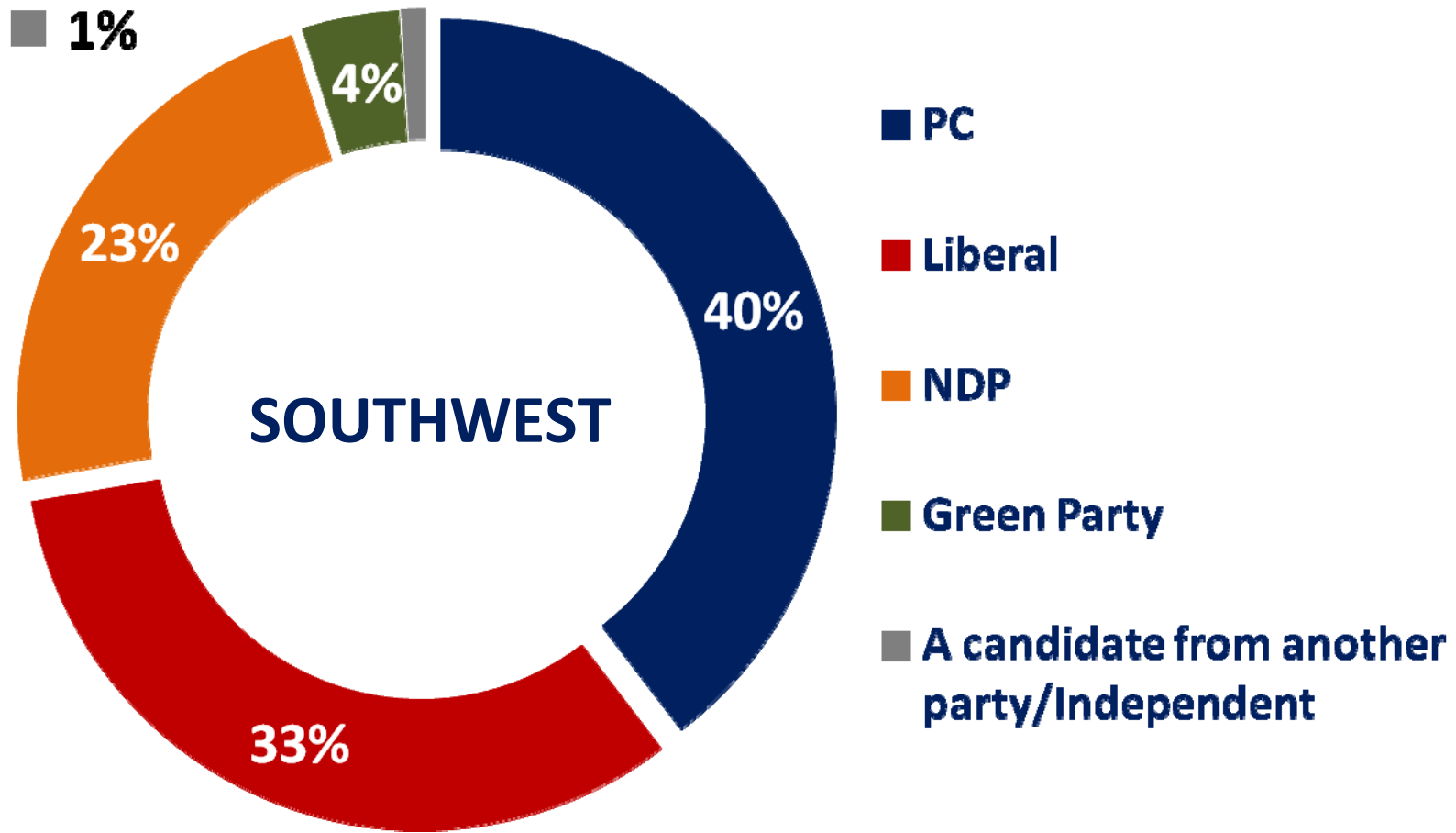
Battleground 905 – Election Results



Ontario Provincial Elections 2011 (EXIT POLL)
ACTUAL VOTERS
Base: Voted for a valid party – GTA-905 n=980



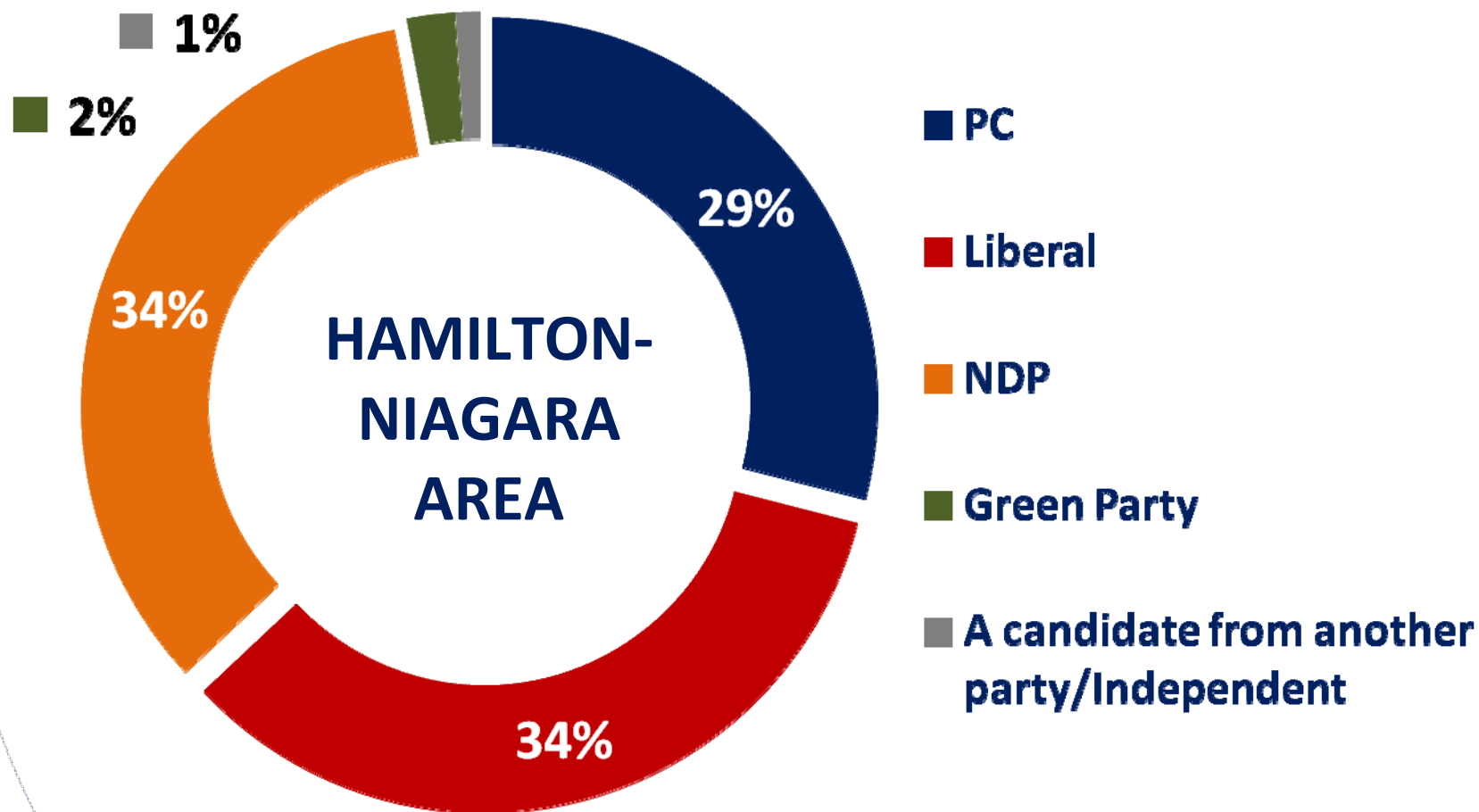
Battleground 519 – Election Results



Ontario Provincial Elections 2011 (EXIT POLL)
ACTUAL VOTERS
Base: Voted for a valid party – SOUTHWEST n=2324



Battleground Golden Horseshoe – Election Results



Ontario Provincial Elections 2011 (EXIT POLL)
ACTUAL VOTERS
Base: Voted for a valid party – GTA-905 n=980



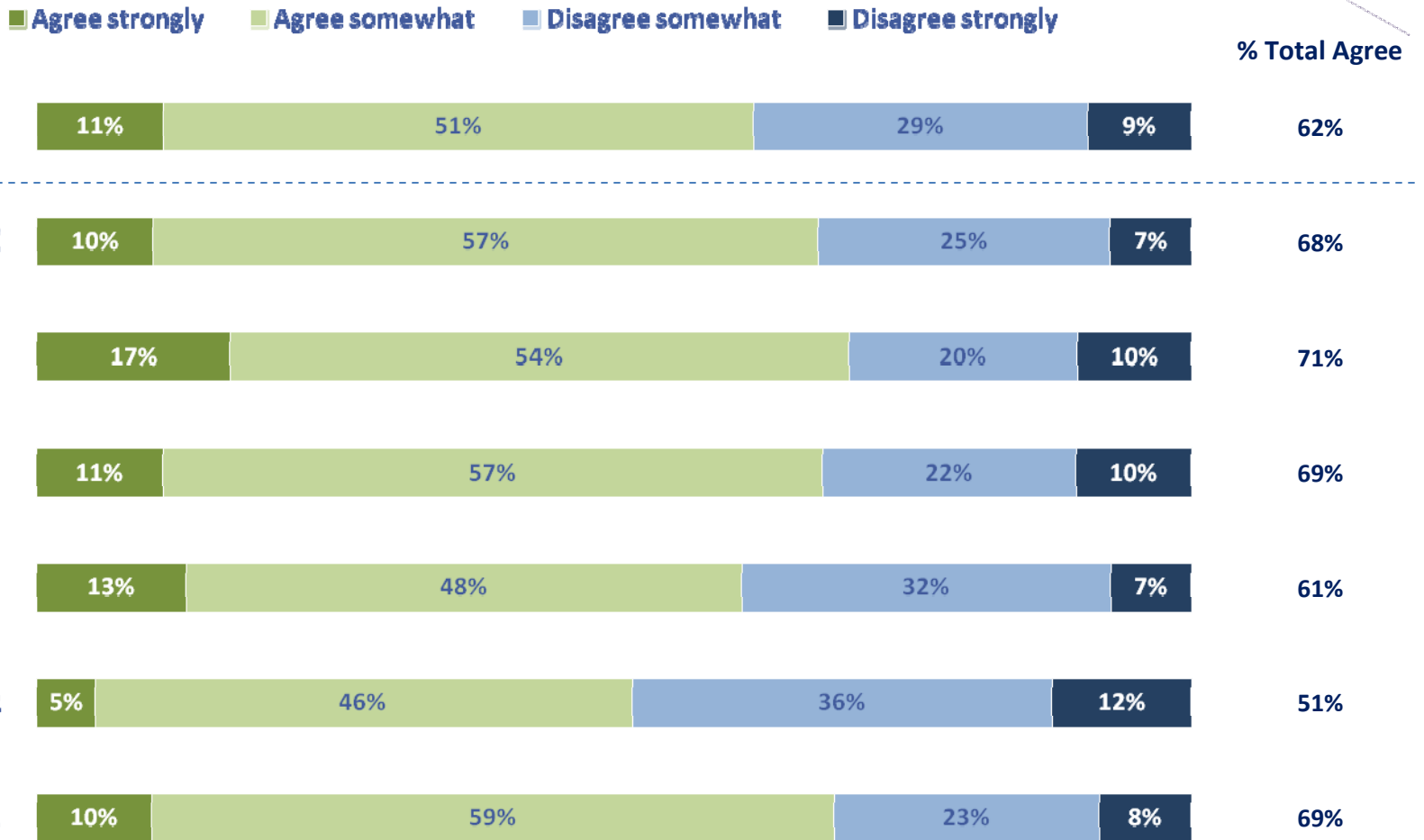
Ballot Questions

- It's likely that the narrative of the election will be centred around a few issues:
- Believe it or not, the Liberals were on the right track politically in how they were dealing with the teachers: at 53% supporting the government and only needing 39% for a majority, the teachers could have been cannon fodder for another Liberal Majority but Premier Wynne is going to let the air out of that tire and try and get the teachers back on side.
- Hudak will be telling us that the deficit, debt reduction and taxes are what matters most.
- Horwath will be telling us it's all about car insurance premiums, and about listening to things like the Idle No More movement that is now blocking mining routes (which the public does not support at all)...

The Economy



Canada Will Be Better Off in 2017 than Today...

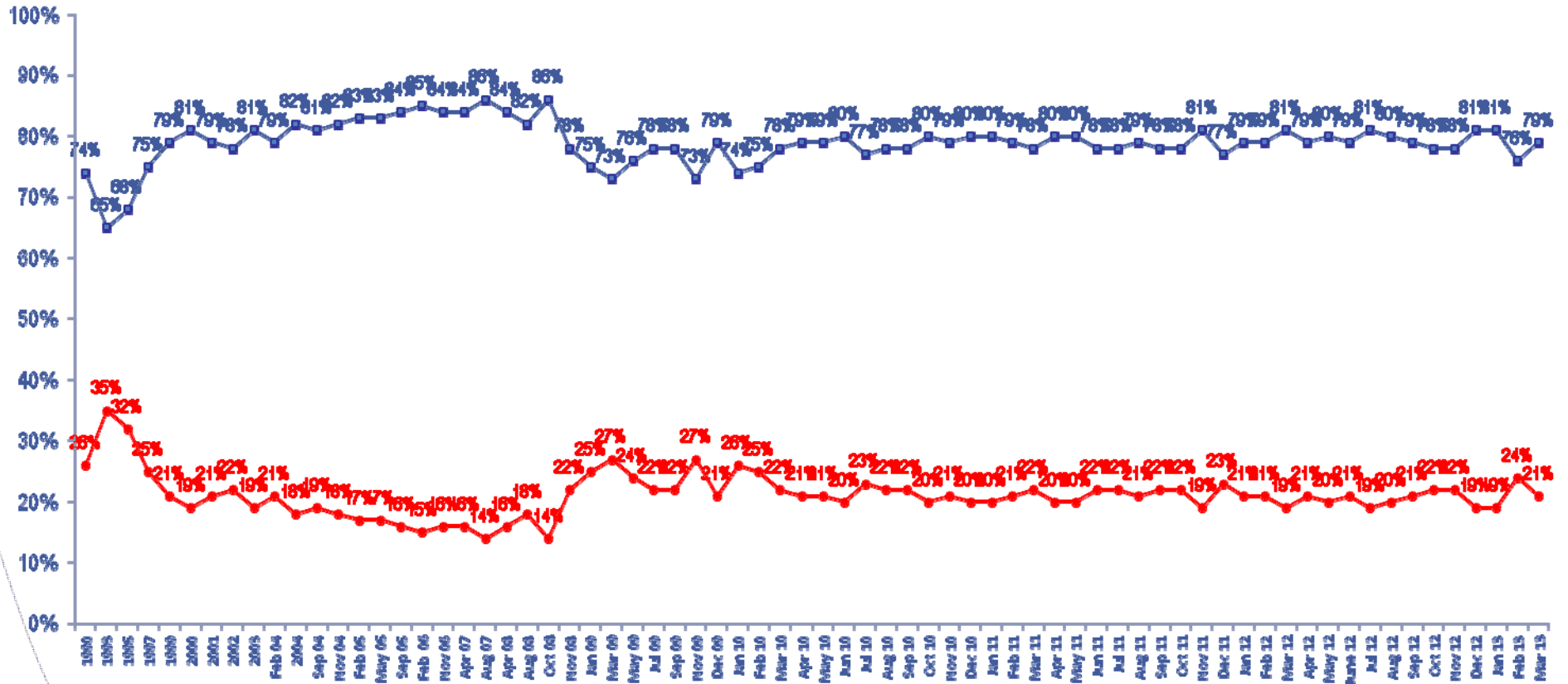


Q1_1. [I think Canada will be better off in 2017 - the 150th anniversary of confederation - than it is today] To what extent do you agree or disagree with the following statements?
Base: n = 1021



National Job Anxiety – 21% Yes vs. 79% No

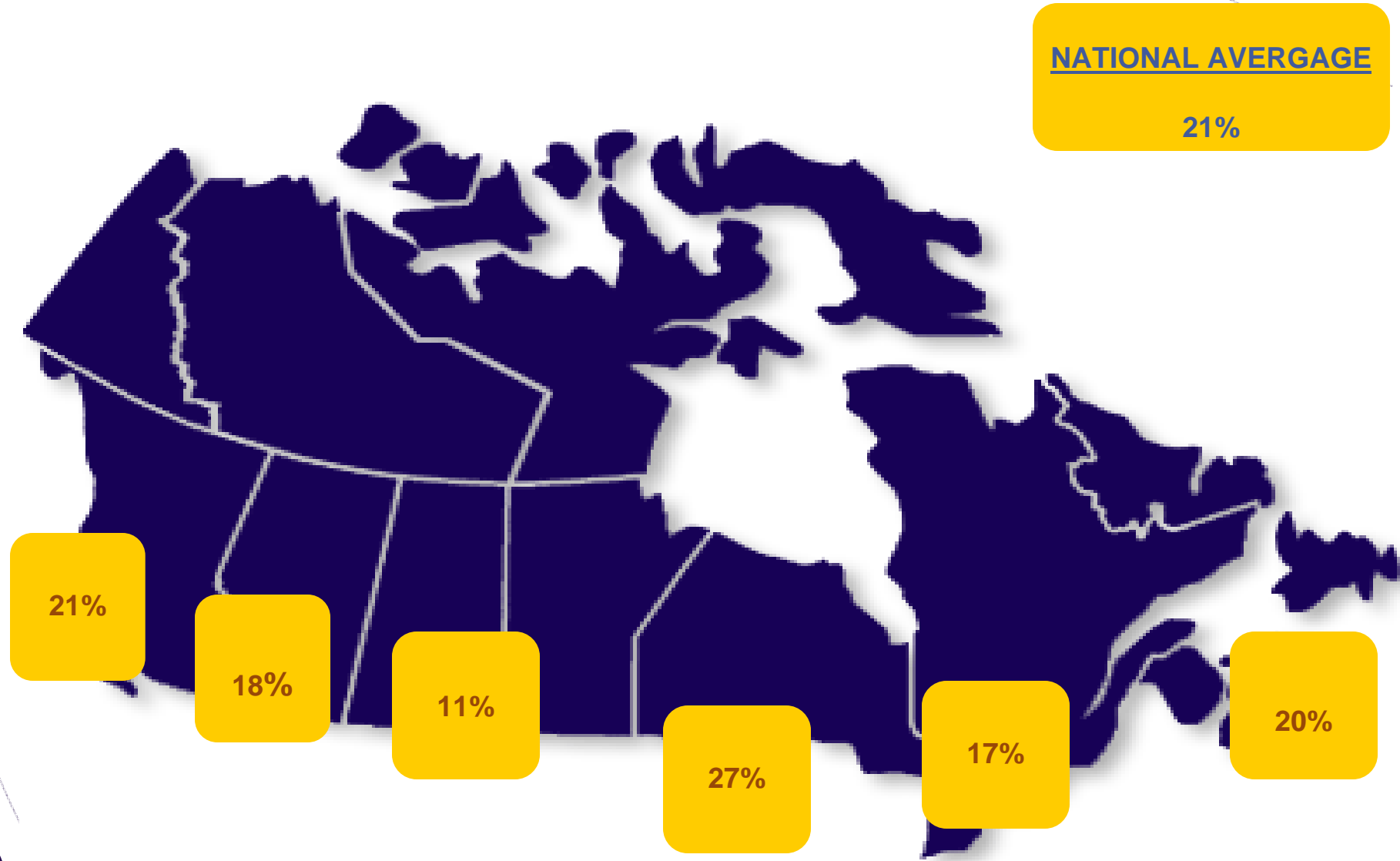
— Yes — No



Are you or is anyone in your household worried about losing their job or being laid off?



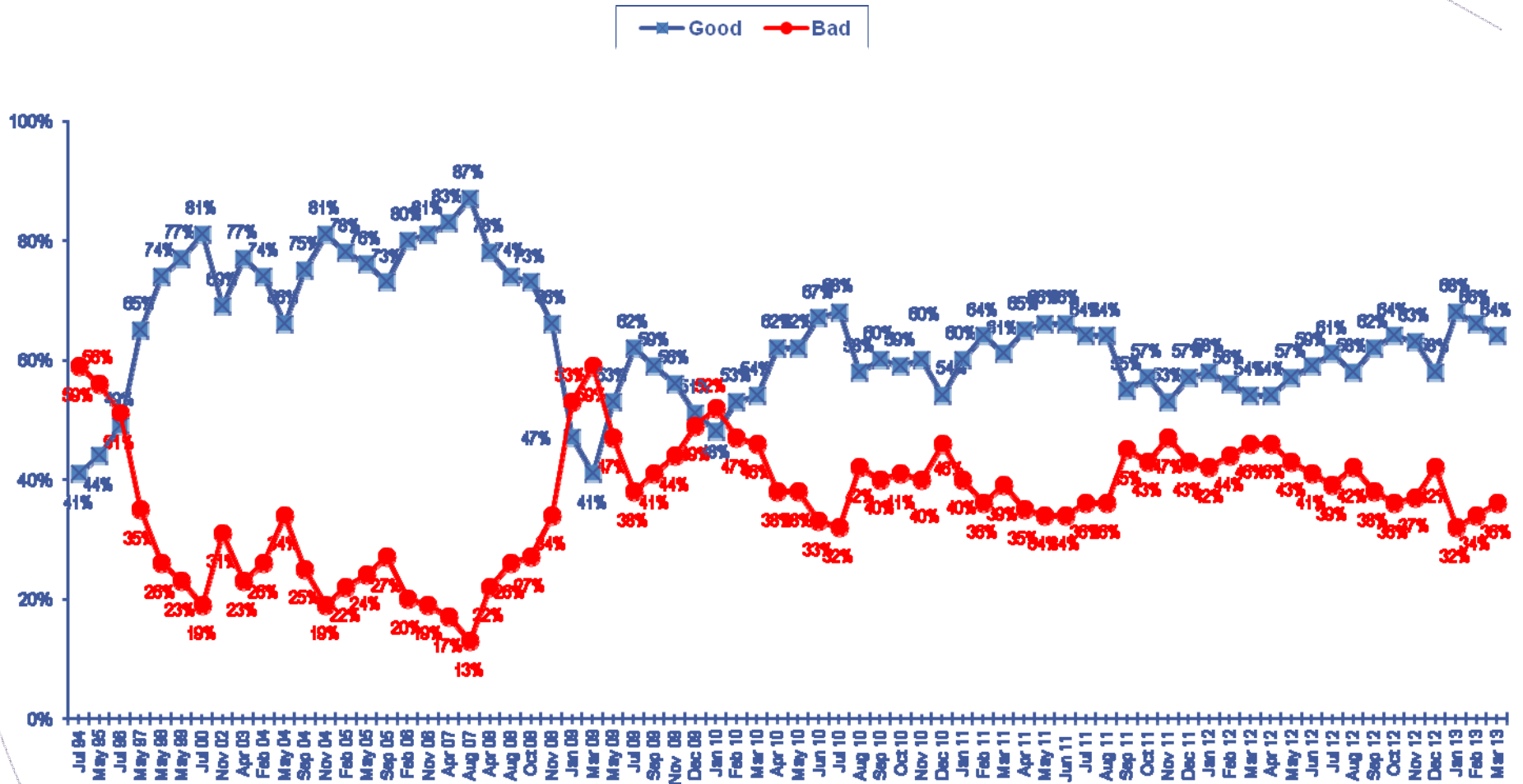
JOB ANXIETY IN CANADA



Are you or is anyone in your household worried about losing their job or being laid off?



Assessment of the Overall State of the Economy – 64% Good vs. 36% Bad

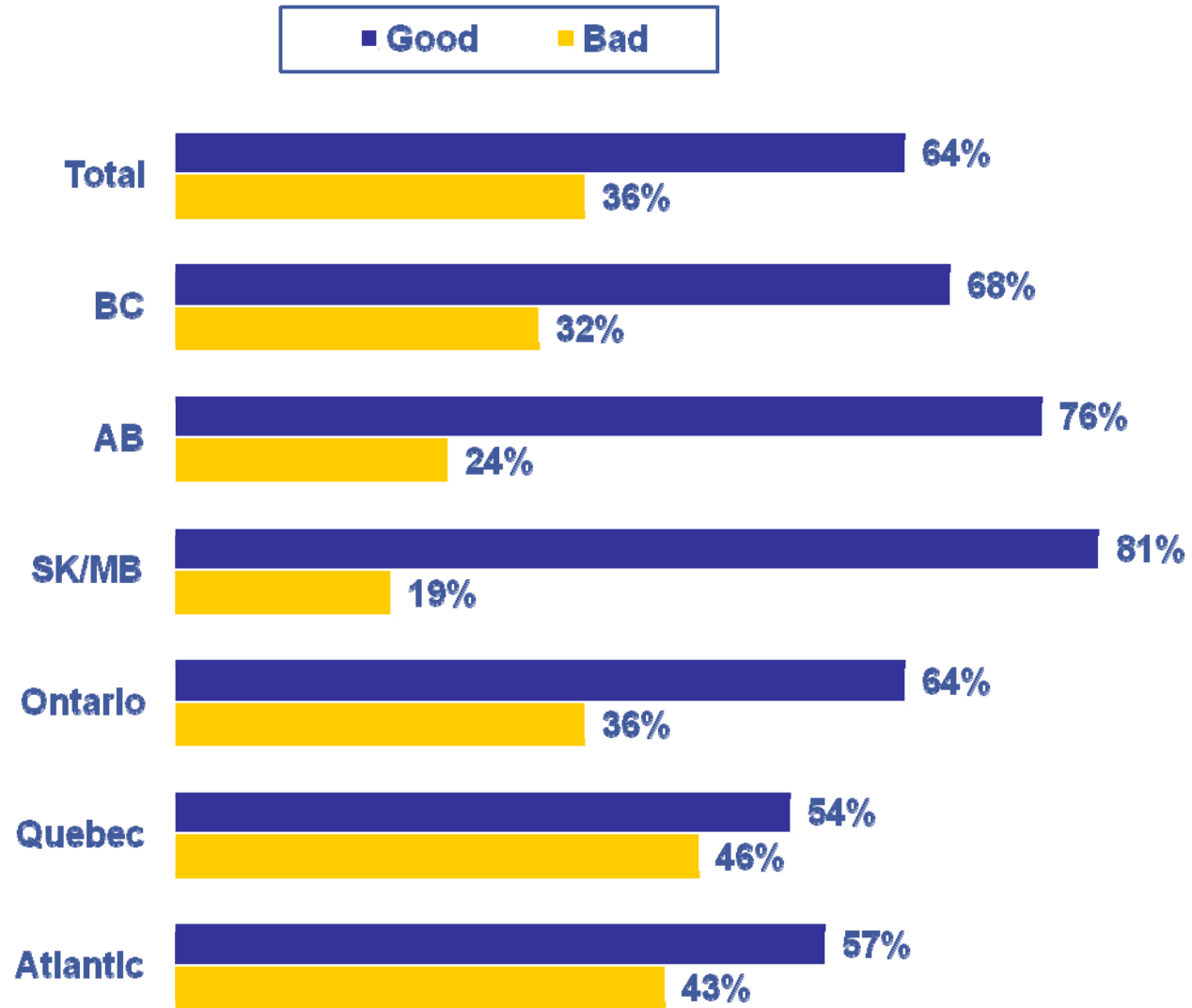


In terms of the current economic conditions in Canada as a whole, how would you describe the overall state of the economy right now? Is it very good, somewhat good, somewhat bad or very bad? Q.1.

Base: All Respondents n=1574



Perception of Overall State of the Canadian Economy

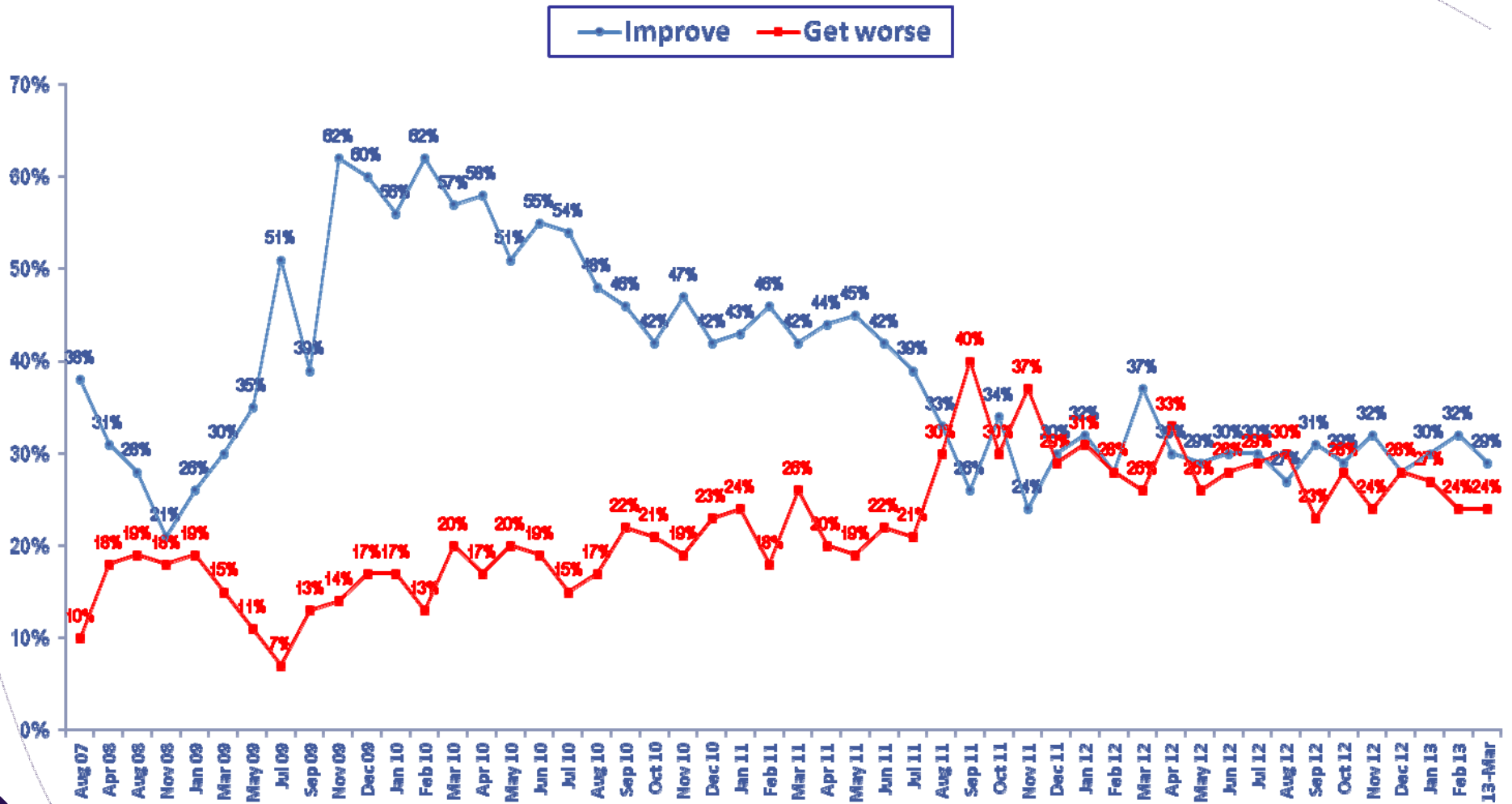


In terms of the current economic conditions in Canada as a whole, how would you describe the overall state of the economy right now?
Is it very good, somewhat good, somewhat bad or very bad? Q.1.

Base: All Respondents n=1574



Outlook for Canadian Economy – Over the Next Year



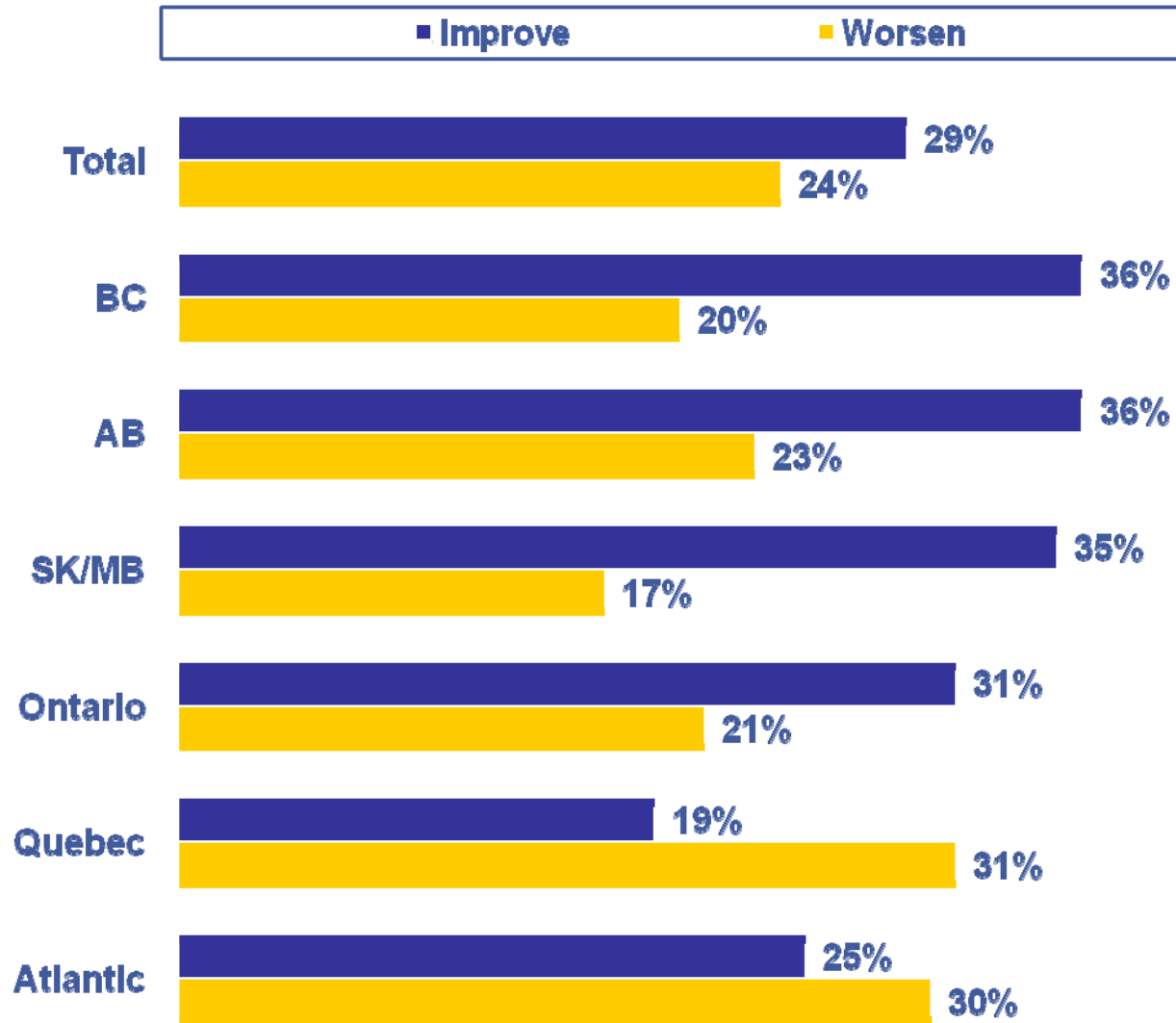
(Canadian economy)

Thinking about the next year or so, do you, yourself, generally feel that the Canadian economy and your own economic situation will improve, stay the same or get worse? Q.9_1.

Base: All Respondents n=1574



Outlook for the Canadian Economy – Over the Next Year



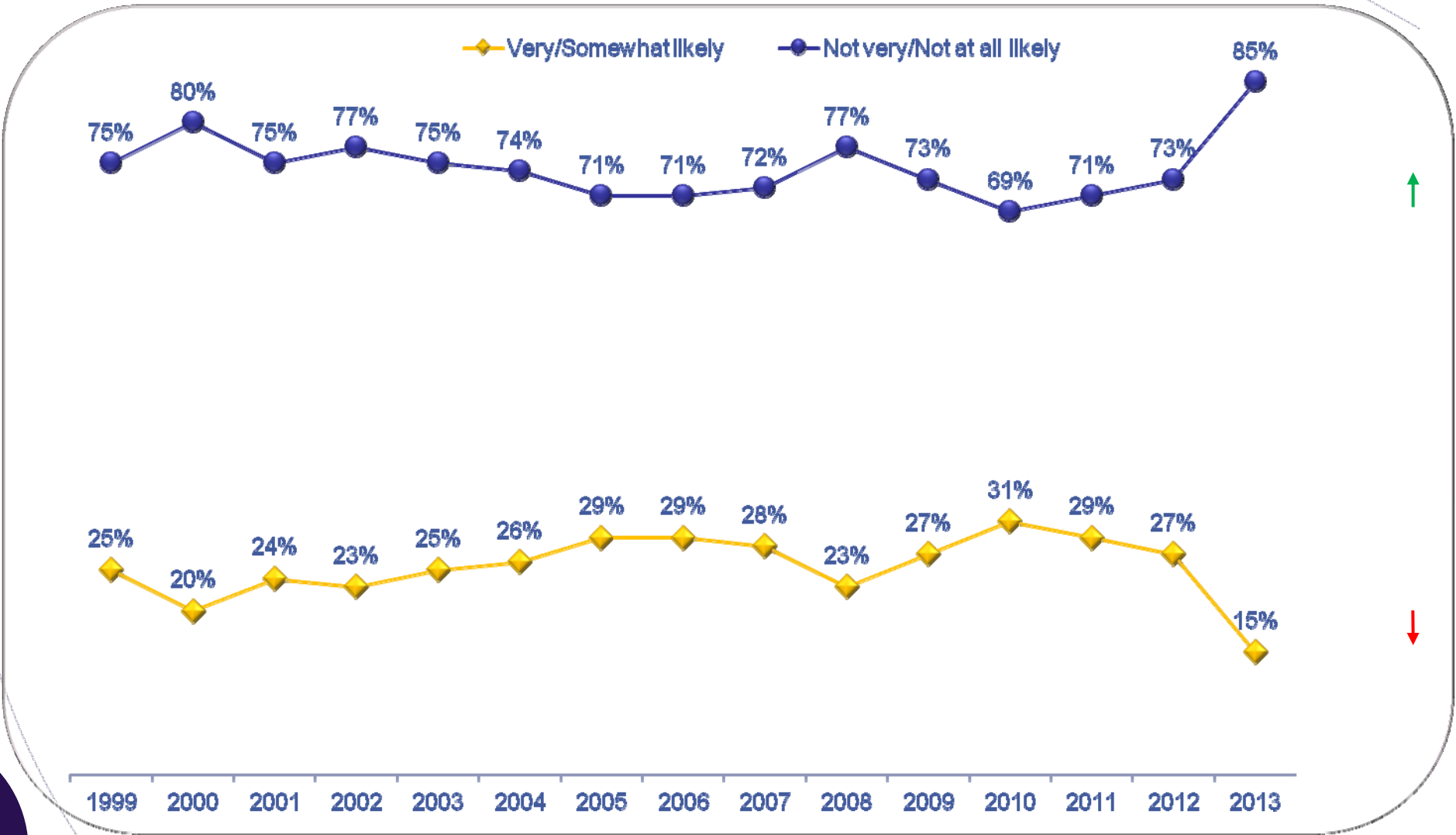
(Canadian economy)

Thinking about the next year or so, do you, yourself, generally feel that the Canadian economy and your own economic situation will improve, stay the same or get worse? Q.9_1.

Base: All Respondents n= 1574



Home Buying Intentions Declining...



Q6. How likely are you to purchase a home, or another home, within the next two years? Are you ...
Base: All respondents 2013 (n=3005); 2012 (n=2006); 2011 (n=2103); 2010 (n= 2047); 2009 (n=2026); 2008 (n=3023); 2007 (n=2404); 2006 (n=2158); 2005 (n=2001); 2004 (n=2000); 2002 & 2003 (n=1500); Previous years (n=1200)

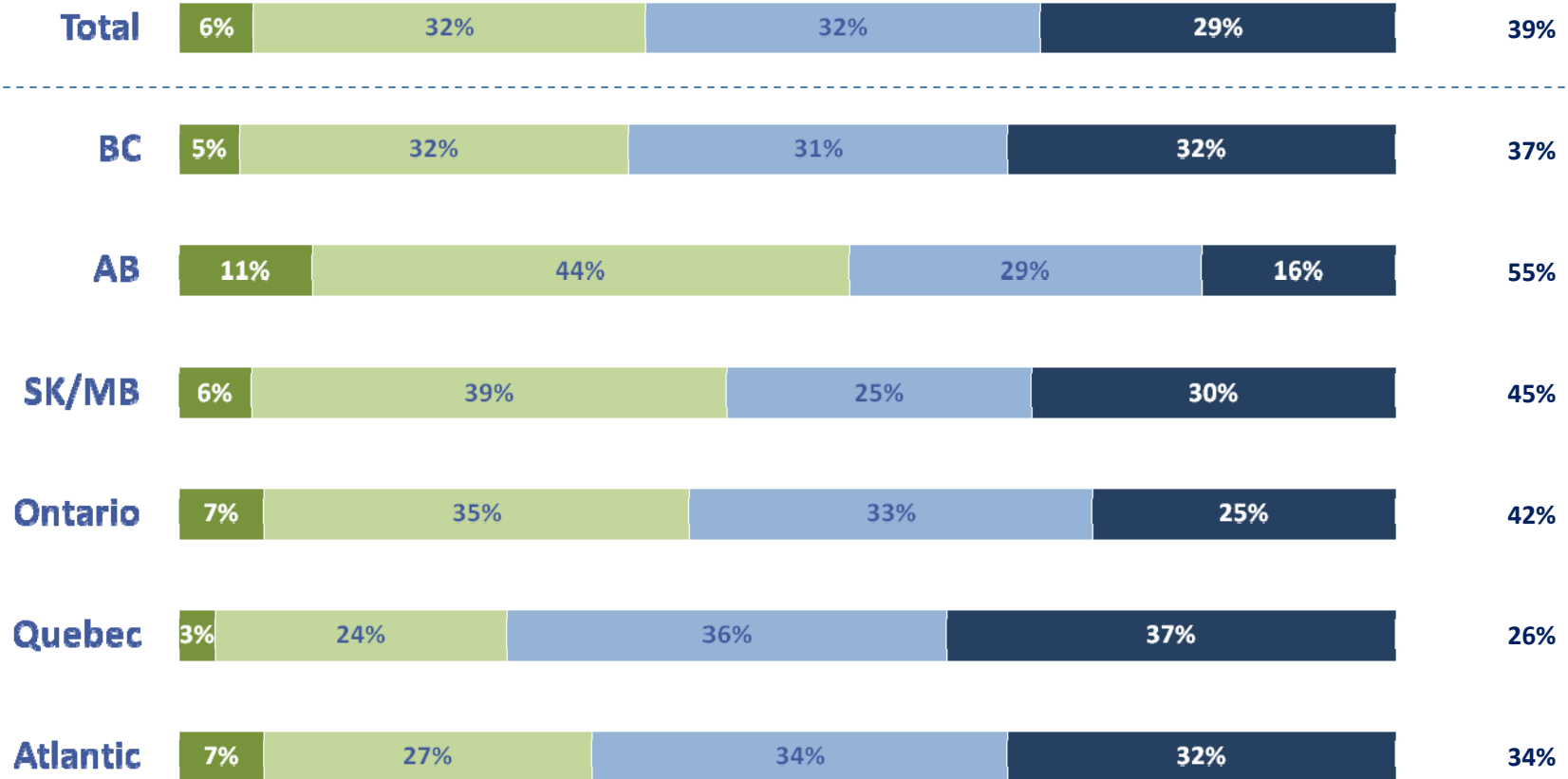
Energy and the Environment



Minority Believes Gov't Does a Good Job Protecting the Environment

■ Agree strongly ■ Agree somewhat ■ Disagree somewhat ■ Disagree strongly

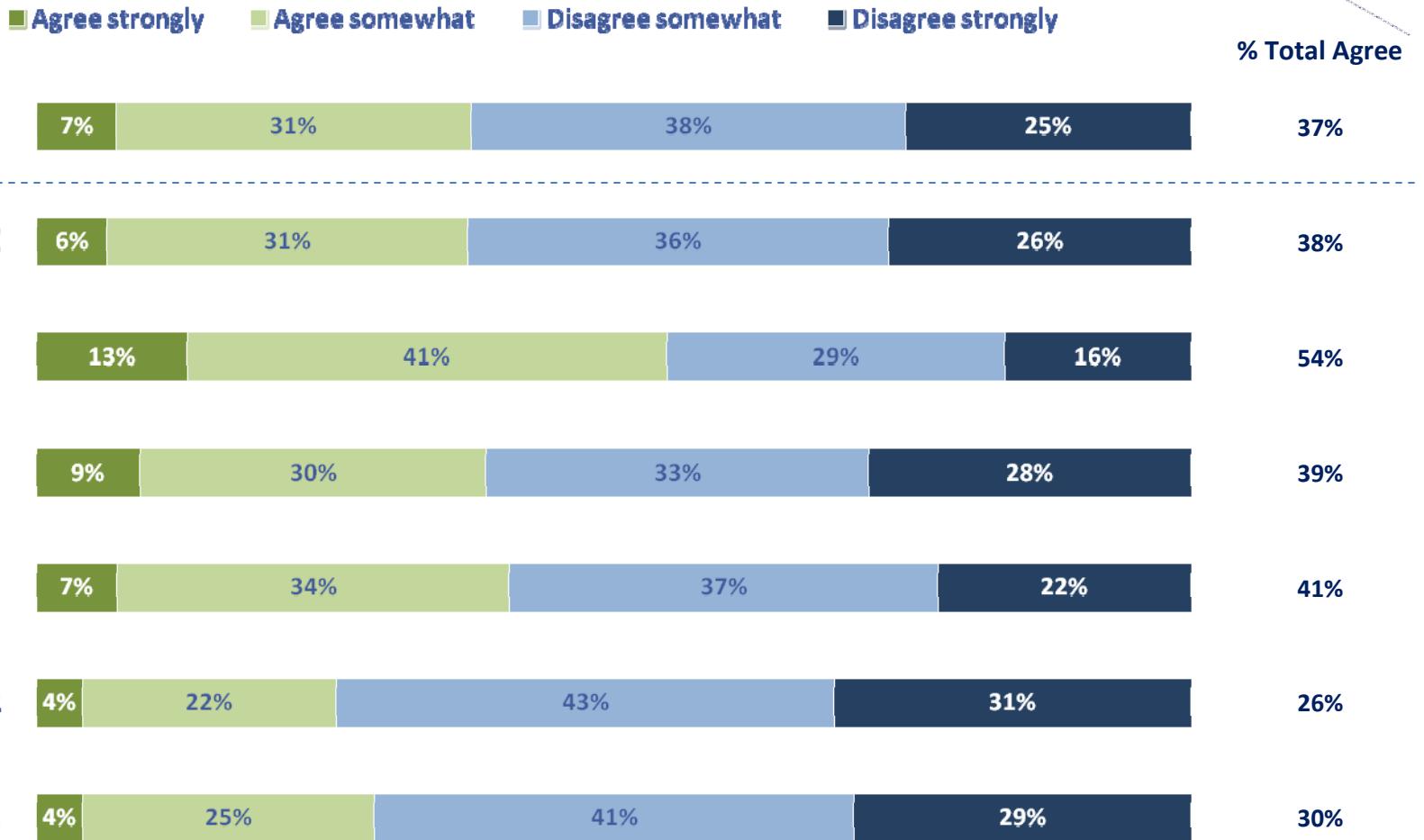
% Total Agree



Q1_1. [The Harper government is doing a good job in protecting Canada's environment] To what extent do you agree or disagree with the following statements?
Base: n = 1021



Minority Believes Gov't has Struck Right Balance Between Econ/Enviro

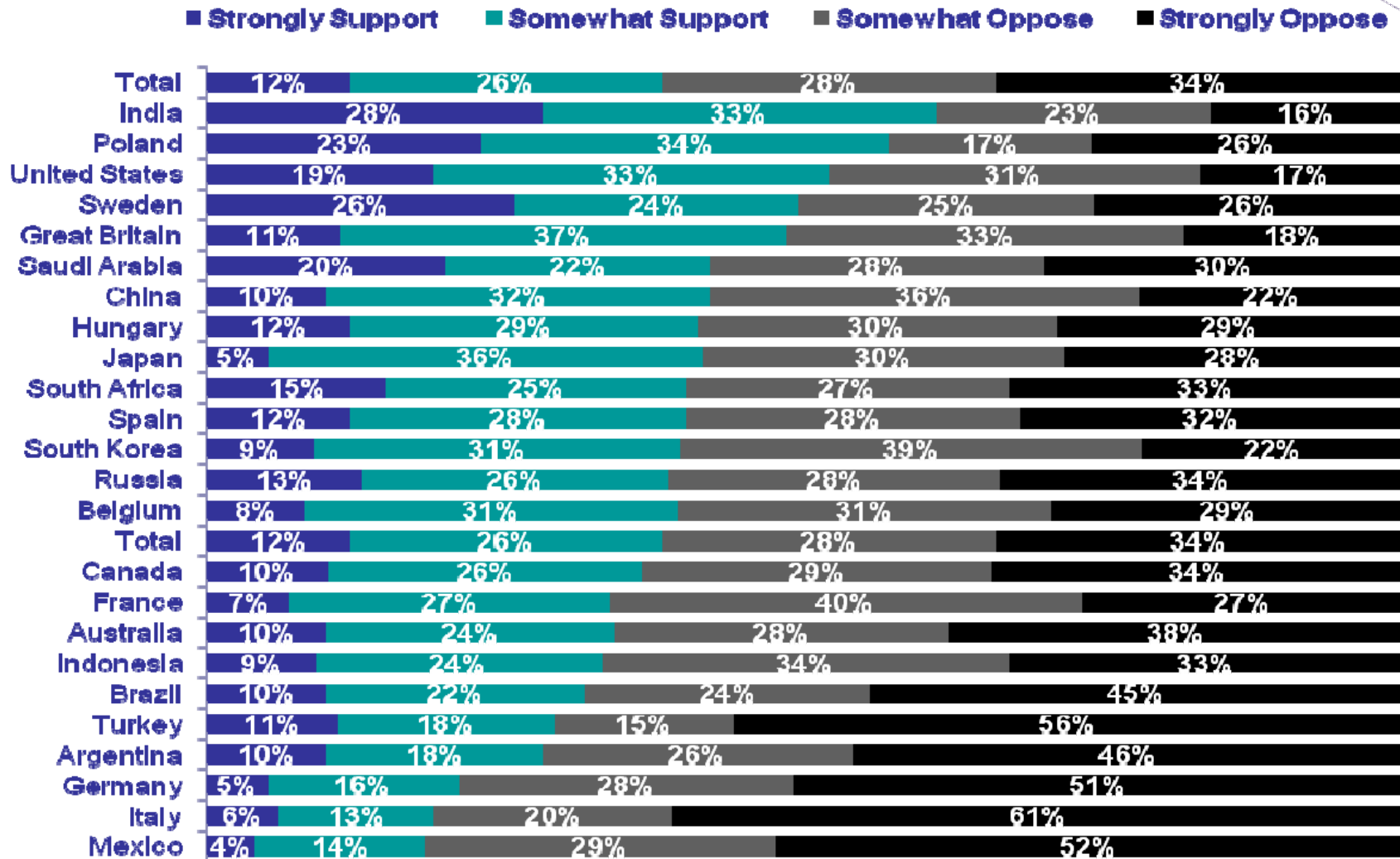


1_2. [The Harper government has struck the right balance between economic growth and environmental protection and management] To what extent do you agree or disagree with the following statements?
Base: n = 1021

Canadians' Views on Nuclear Power



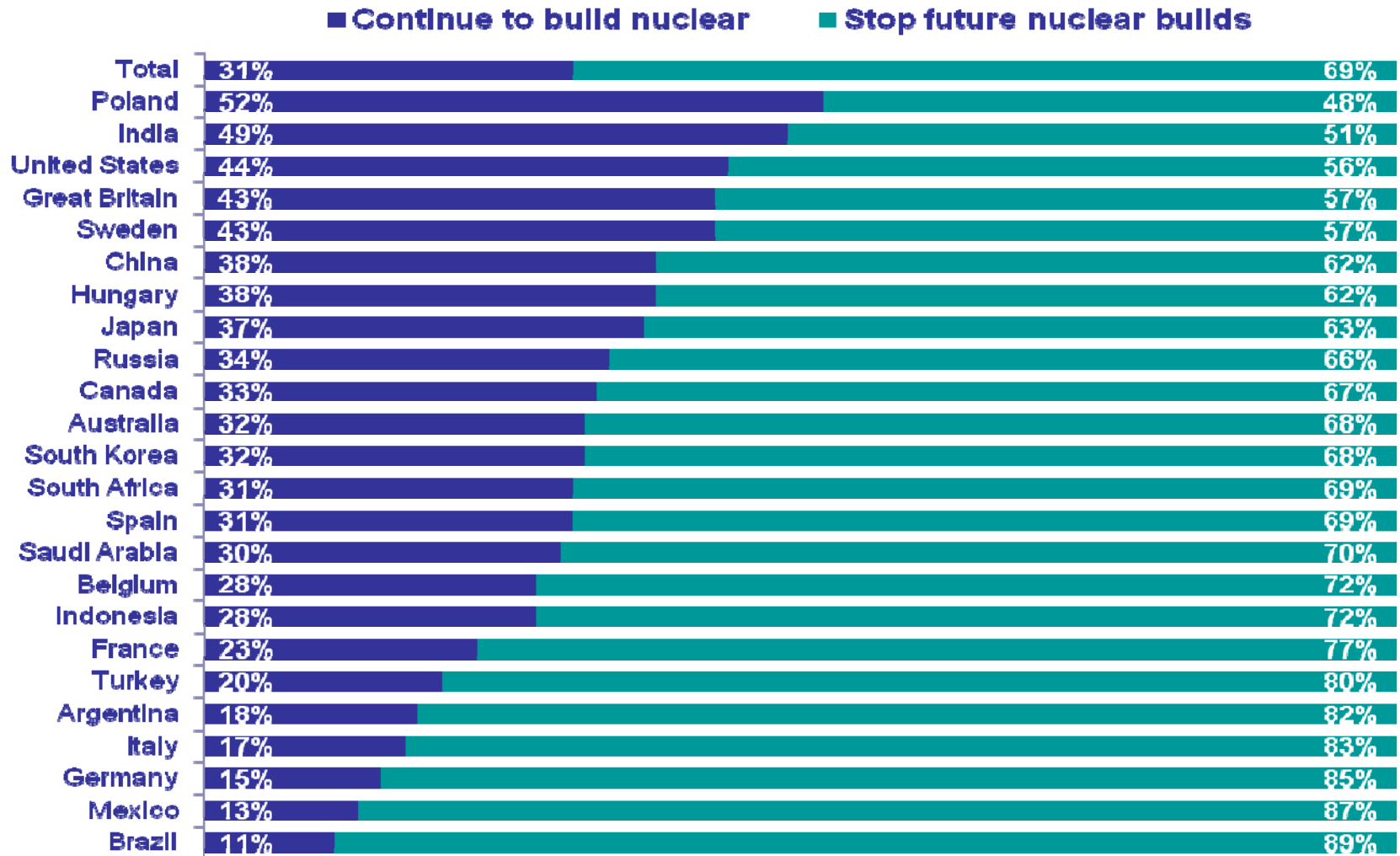
36% of Canadians Support Nuclear Energy



Please indicate whether you strongly support, somewhat support, somewhat oppose, or strongly oppose each way of producing electricity. Base: All Respondents n = 18787



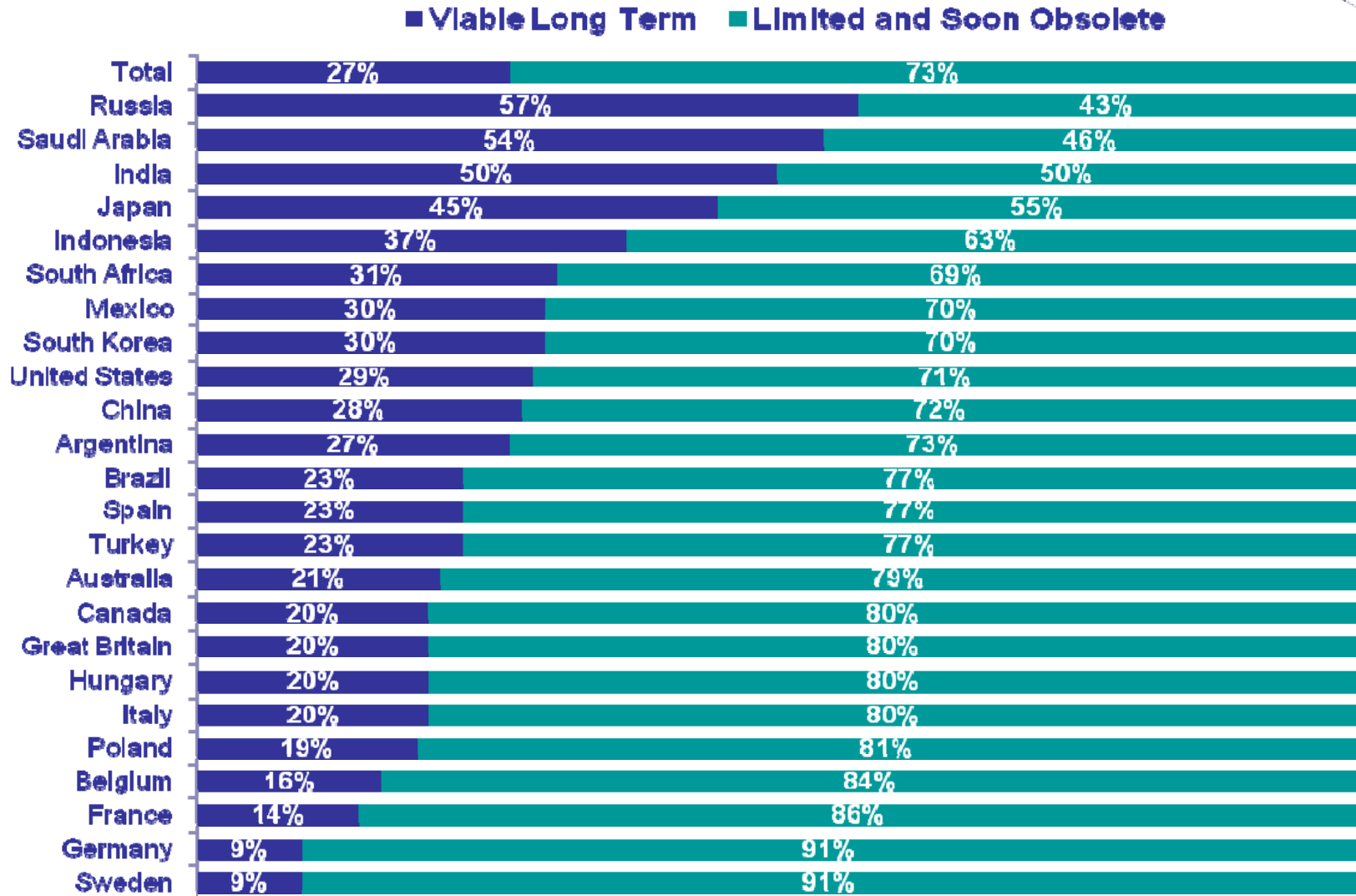
33% Think Nuclear Plants Should Continue to be Built



Which is closer to your point of view? Base: Have seen, read or heard in Q8 n= 17969



20% Think Nuclear is Viable in the Long Term



Overall, do you think that electricity produced from nuclear energy will be a viable long term option for countries who need to produce it in that way or do you think it is only a limited and soon obsolete form of producing energy for the future?
Base: Strongly/somewhat oppose Nuclear energy in Q3 n = 11529

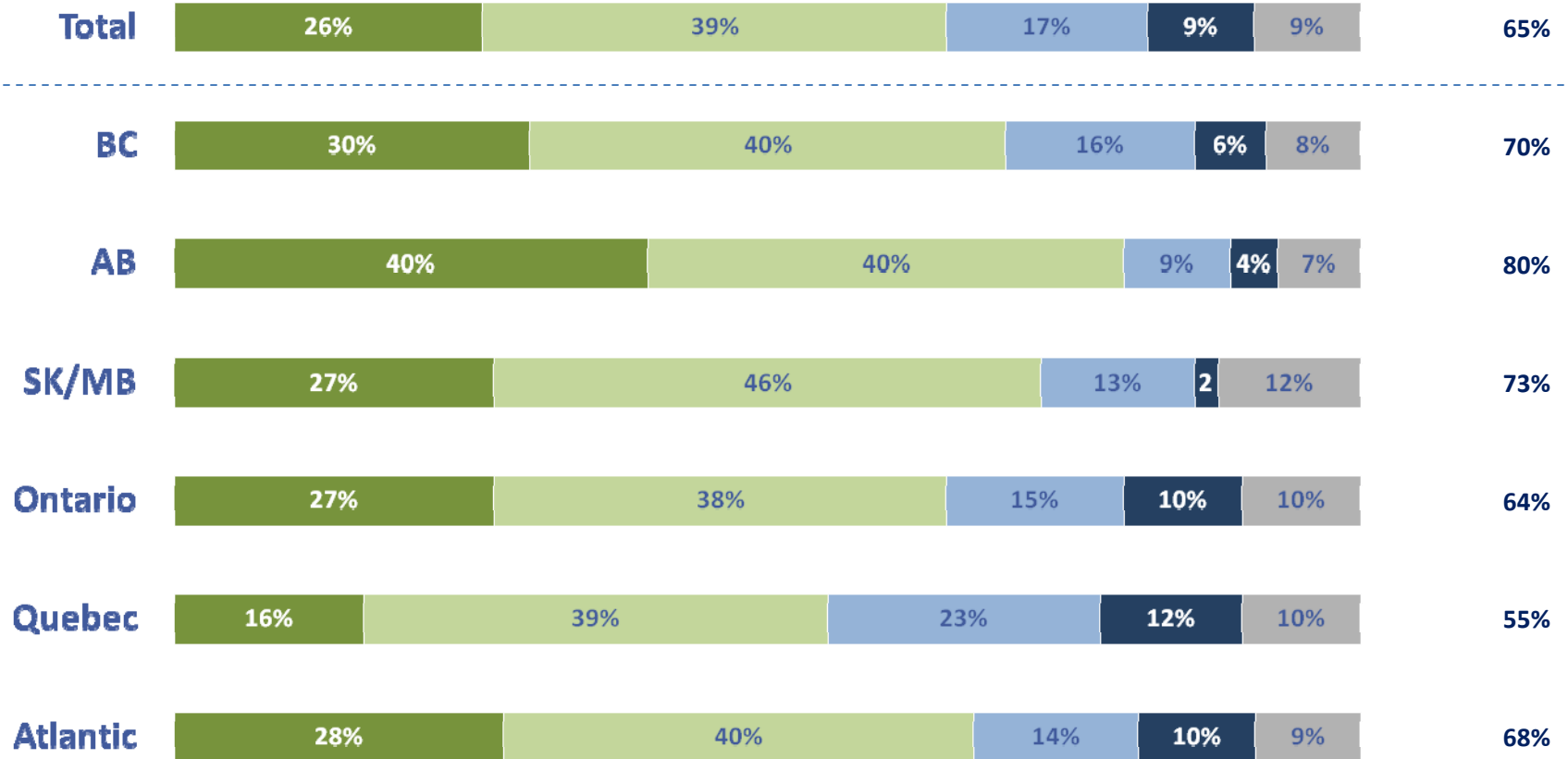
Views on Oil and Gas



It's Possible to Increase Oil/Gas Production While Respecting Enviro

■ Agree strongly ■ Agree somewhat ■ Disagree somewhat ■ Disagree strongly ■ No opinion

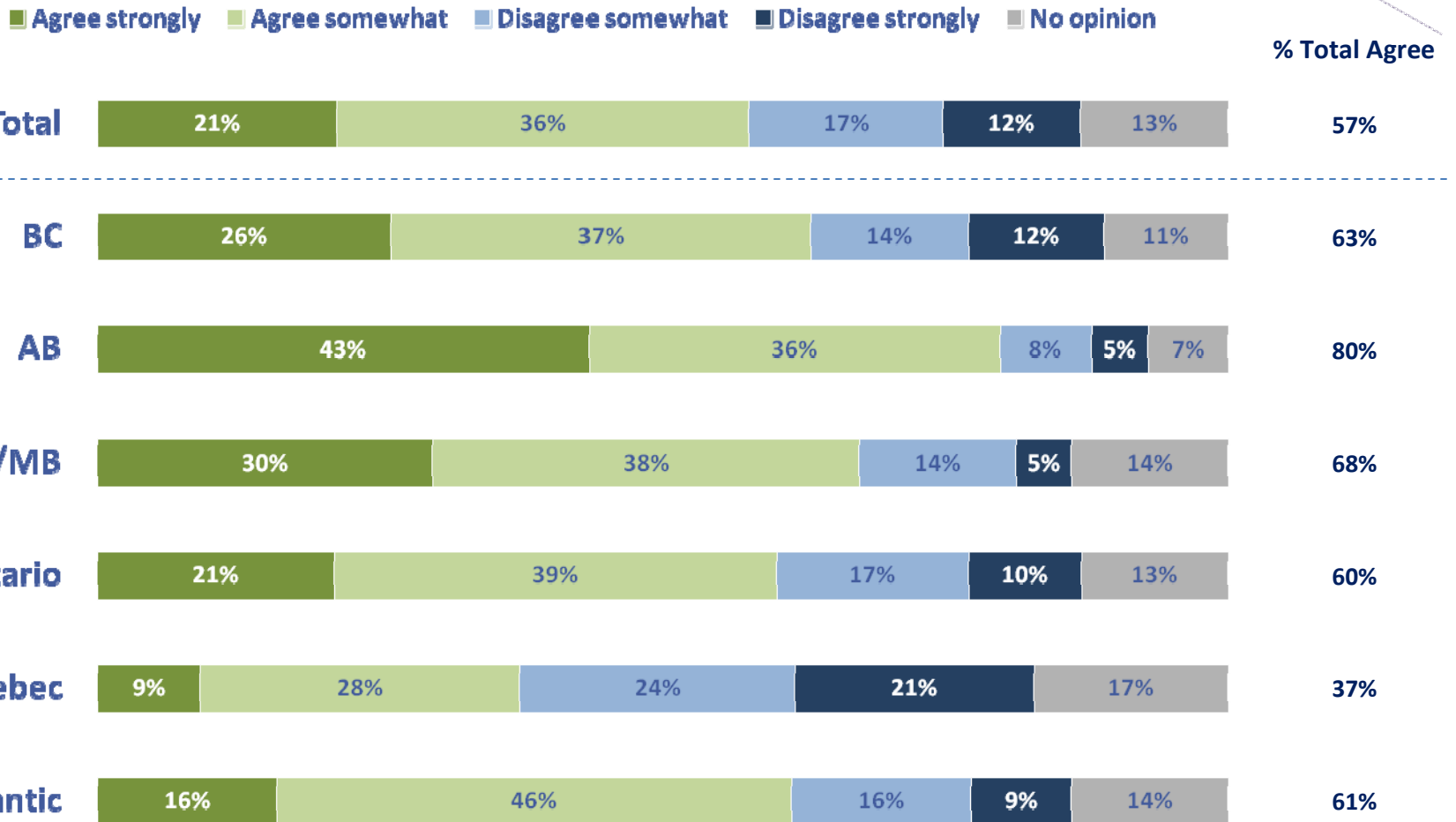
% Total Agree



(It is possible to increase oil and gas production while respecting the environment at the same time) Please indicate your level of agreement with each of the following statements about Canadian oil and gas.
Base: n = 1021



Benefits of Oil Sands Development Outweigh Negatives



(I think that overall the benefits of development of the oil sands in Canada outweigh the negatives) Please indicate your level of agreement with each of the following statements about Canadian oil and gas.
Base: n = 1021

Ontarians on Wind Energy

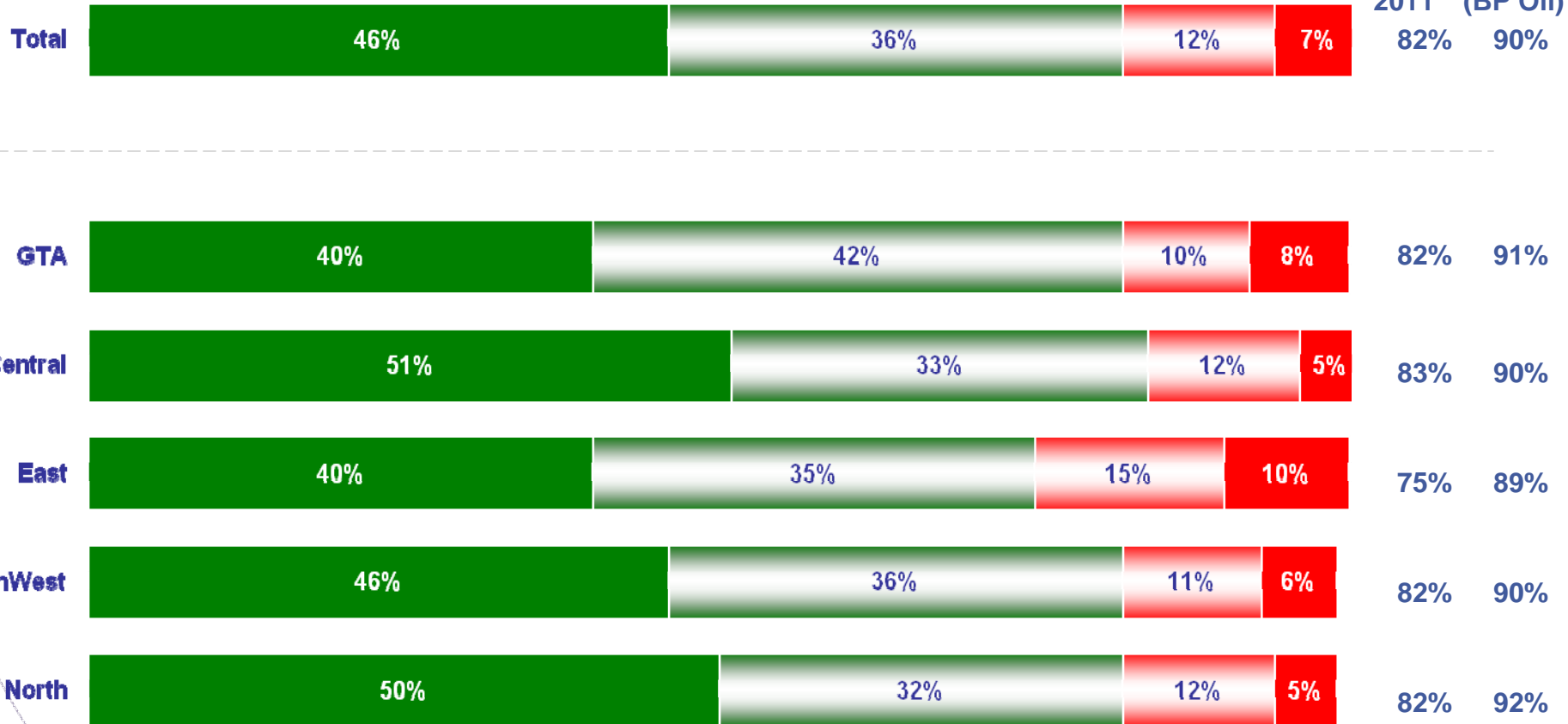


Attention to Alternative Energies in the Wake of Fukushima

Ever since the Fukushima nuclear power station incident in Japan, I think we need to focus more on alternative sources of energy...

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

Total Agree July 2011 Total Agree June 2011 (BP Oil)

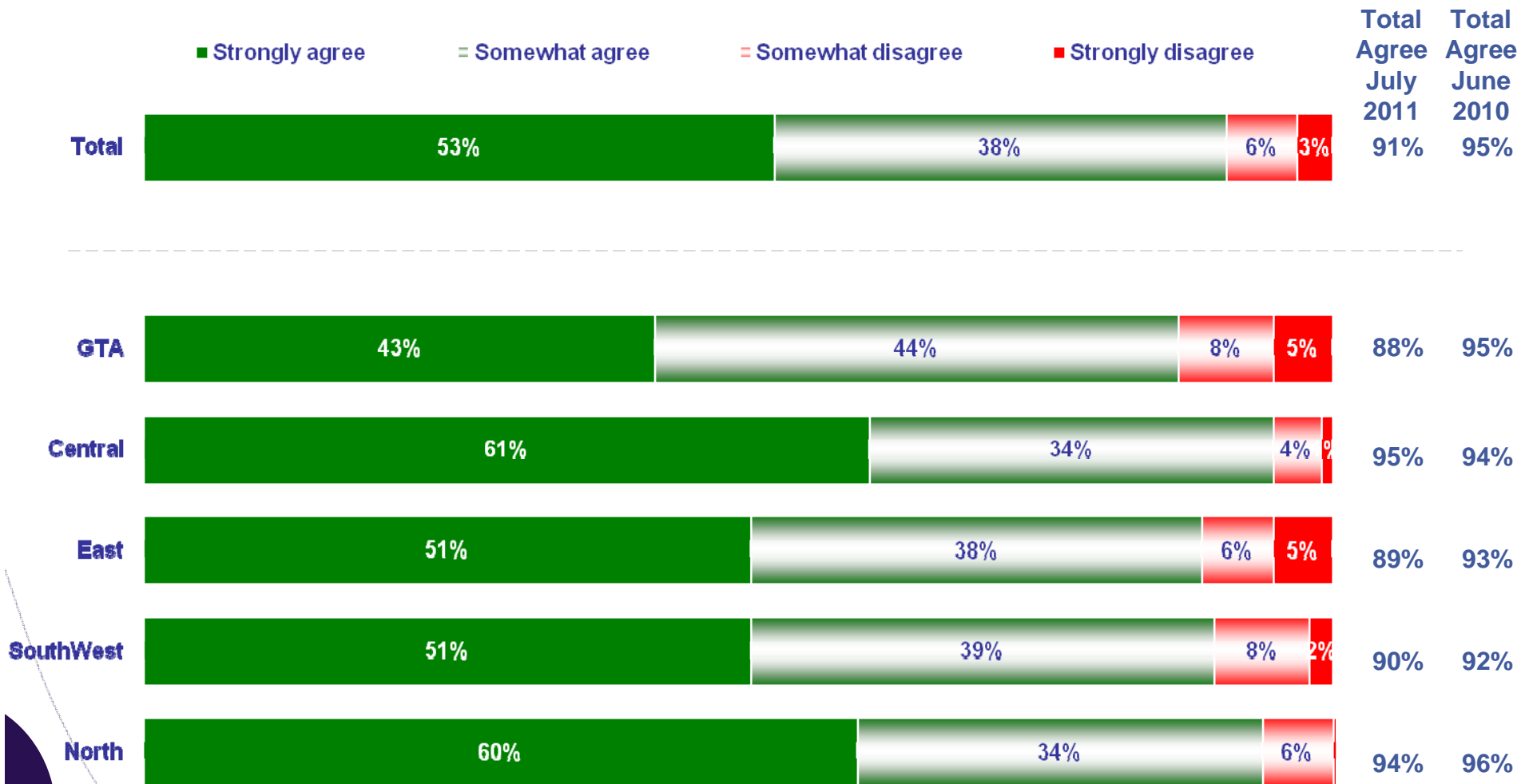


Thinking about wind power in general, to what extent do you agree or disagree with the following statements? Base: All respondents n=1,488



Importance of Ontario's Electricity Supply Becoming Environmentally Friendly

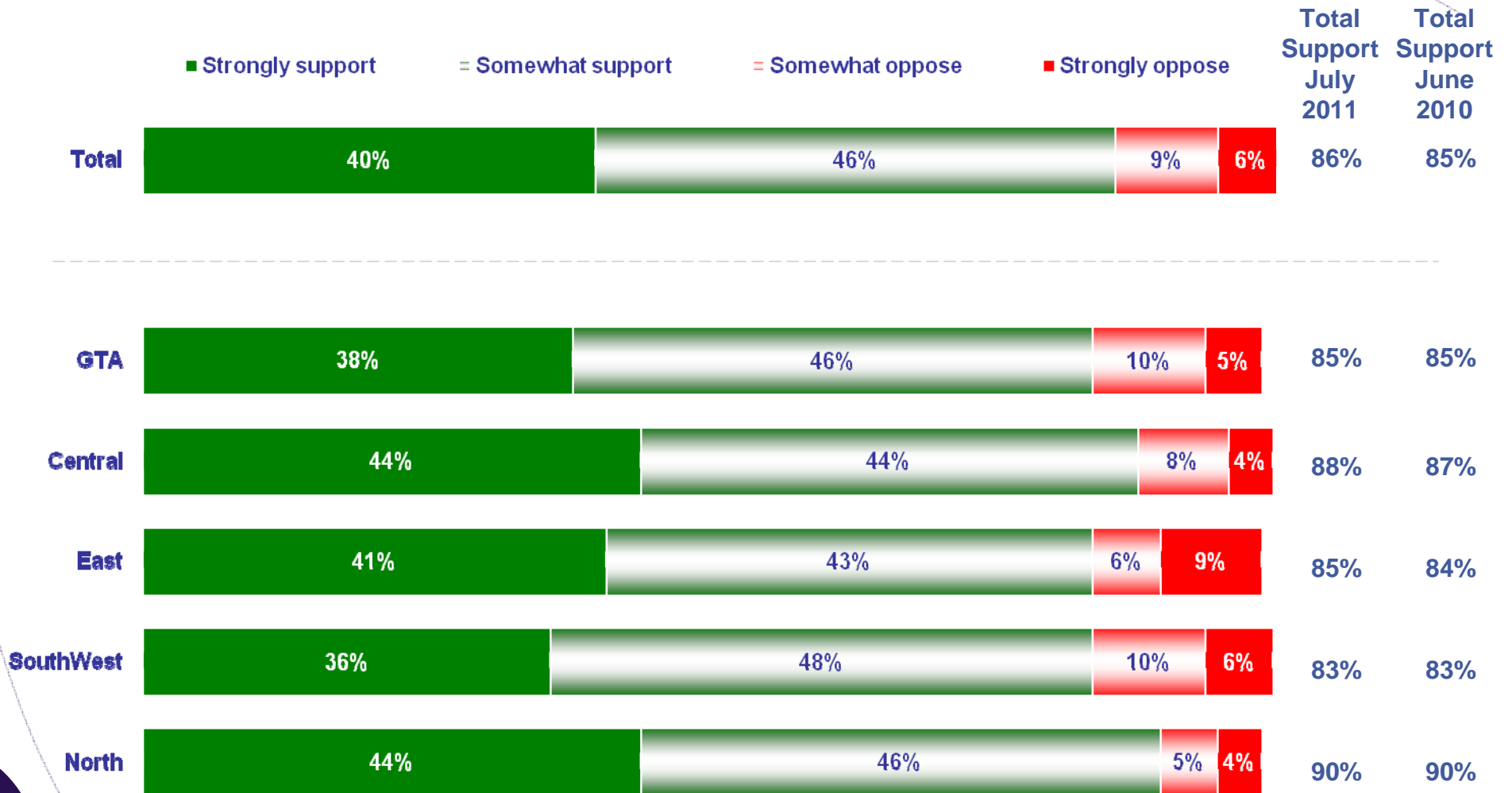
It is important to me that Ontario's electricity supply becomes more environmentally friendly



Thinking about wind power in general, to what extent do you agree or disagree with the following statements? Base: All respondents n=1,488



Support Production of Wind Energy in Ontario

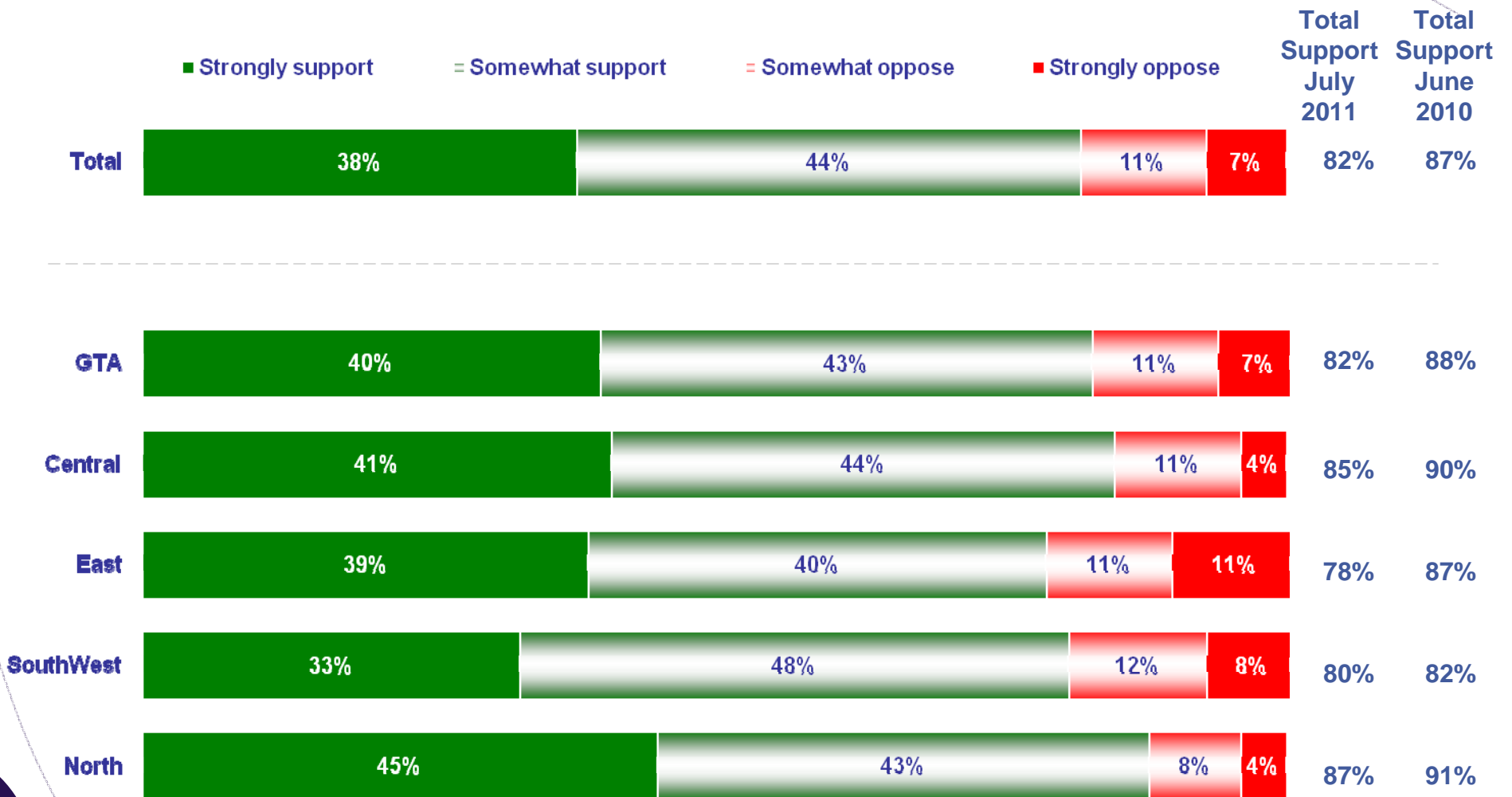


To what extent do you support or oppose the production of wind energy in your region of Ontario?

Base: All respondents n=1,488



Support for Wind Energy in Your Community



To what extent do you support or oppose the production of wind energy in your community?

Base: All respondents n=1,488



The Benefits of Wind Energy

	Total		Region (2011)				
	2011	2010	GTA	Central	East	SouthWest	North
Cheap/ affordable/ cost saving	20%	25%	19%	24%	17%	20%	21%
Clean/ clean energy	18%	20%	13%	20%	21%	16%	21%
Good/ better for the environment (incl. environmentally friendly)	15%	20%	19%	14%	16%	13%	15%
Renewable resource	14%	18%	10%	16%	19%	13%	15%
Less pollution/ less air pollution (incl. no pollution)	14%	14%	15%	16%	14%	14%	10%
Natural resource	7%	8%	8%	6%	5%	8%	5%
Perpetual/ sustainable/ infinite	6%	7%	4%	7%	6%	7%	5%
Less dependency on others (system/ resource)	6%	2%	3%	8%	3%	7%	5%
Less reliant on fossil fuels	5%	8%	5%	5%	3%	5%	5%
It's free	4%	5%	5%	4%	4%	3%	7%
Saves energy	4%	6%	6%	3%	1%	5%	2%
Green/ green energy	3%	6%	2%	6%	2%	3%	5%
Zero (carbon) emission	3%	-	3%	5%	2%	3%	3%
Efficient	3%	2%	2%	4%	3%	3%	4%
Safe/ safer	3%	5%	4%	3%	1%	3%	3%
Alternative energy source/ a different type of energy	3%	2%	1%	5%	2%	2%	2%
Better/ more energy production	2%	2%	1%	4%	0%	4%	1%
Less depletion of natural resource	2%	1%	2%	2%	2%	2%	2%
Readily availability	2%	2%	1%	3%	3%	2%	1%
Employment opportunities	1%	2%	1%	1%	1%	1%	2%
Less noise/ quiet	1%	2%	1%	1%	1%	1%	2%
Looks good/ attractive	1%	1%	1%	1%	2%	1%	-
Benefits/ financial benefits (farmers, people)	1%	1%	1%	1%	1%	1%	0%
Low set-up/ maintenance (cost)	1%	1%	1%	0%	3%	0%	0%
Simple/ easy/ convenient	1%	1%	1%	1%	-	-	1%
Reliable	1%	1%	1%	-	1%	1%	0%
Effective usage of natural resource	1%	1%	0%	1%	0%	1%	1%
Locally produced	0%	1%	-	1%	0%	0%	-
Other	6%	5%	10%	6%	5%	4%	4%
None/ nothing	6%	4%	4%	5%	10%	7%	5%
Don't know	6%	7%	10%	4%	7%	5%	3%

What do you consider to be the main benefits of wind energy? Please list as many as come to mind. Base: All respondents n=1,488.



The Drawbacks of Wind Energy

	Total		Region (2011)				
	2011	2010	GTA	Central	East	SouthWest	North
Loud/ noisy/ noise pollution	24%	23%	18%	28%	35%	20%	26%
Ugly/ not pleasing to the eye/ eye sore	17%	16%	15%	21%	16%	16%	17%
Health concerns	9%	8%	5%	11%	8%	12%	8%
Cost/ expensive to build or set up	7%	7%	6%	7%	4%	10%	7%
Takes up too much space/ land	7%	7%	5%	11%	7%	7%	6%
Lack of wind/ no windy days/ requires wind	6%	8%	8%	6%	5%	5%	11%
Kills/ injures birds and or bats	6%	4%	4%	7%	11%	3%	7%
Expensive	5%	6%	4%	4%	7%	5%	9%
Generates a limited amount of energy	5%	3%	5%	5%	6%	5%	3%
Location of the turbines	5%	3%	3%	6%	1%	5%	8%
Cost (unspecified)	5%	3%	3%	6%	10%	3%	3%
Unreliable	4%	5%	5%	5%	4%	4%	3%
Big/ too large	3%	5%	3%	4%	3%	2%	4%
Opposition of people who live near the windmills	3%	2%	3%	4%	2%	4%	1%
Effects on wildlife	3%	2%	2%	3%	4%	1%	5%
Inefficient	2%	2%	3%	1%	3%	2%	1%
Environmental impact	2%	-	1%	2%	0%	1%	3%
Affects bird migration	1%	1%	0%	2%	1%	1%	1%
(High) maintenance costs	1%	1%	0%	1%	-	2%	1%
Causes changes in the wind/ weather patterns	1%	1%	-	1%	0%	2%	2%
Vibrations from the wind turbines	1%	1%	1%	2%	1%	1%	1%
Subsidized by taxpayers	1%	1%	1%	1%	2%	1%	0%
Only benefits producers and large consumers/ not for the average consumer	1%	1%	-	1%	1%	2%	-
Lowers property values	1%	-	-	0%	0%	1%	1%
Not cost effective	1%	1%	2%	0%	1%	0%	1%
No technology to store the energy collected/ produced	1%	-	0%	1%	0%	1%	-
Other	7%	10%	9%	7%	8%	6%	6%
None/ nothing	5%	14%	2%	8%	9%	4%	3%
Don't know	17%	12%	25%	10%	14%	19%	14%

What do you consider to be the main drawbacks of wind energy. Please list as many as come to mind. Base: All respondents n=1,488



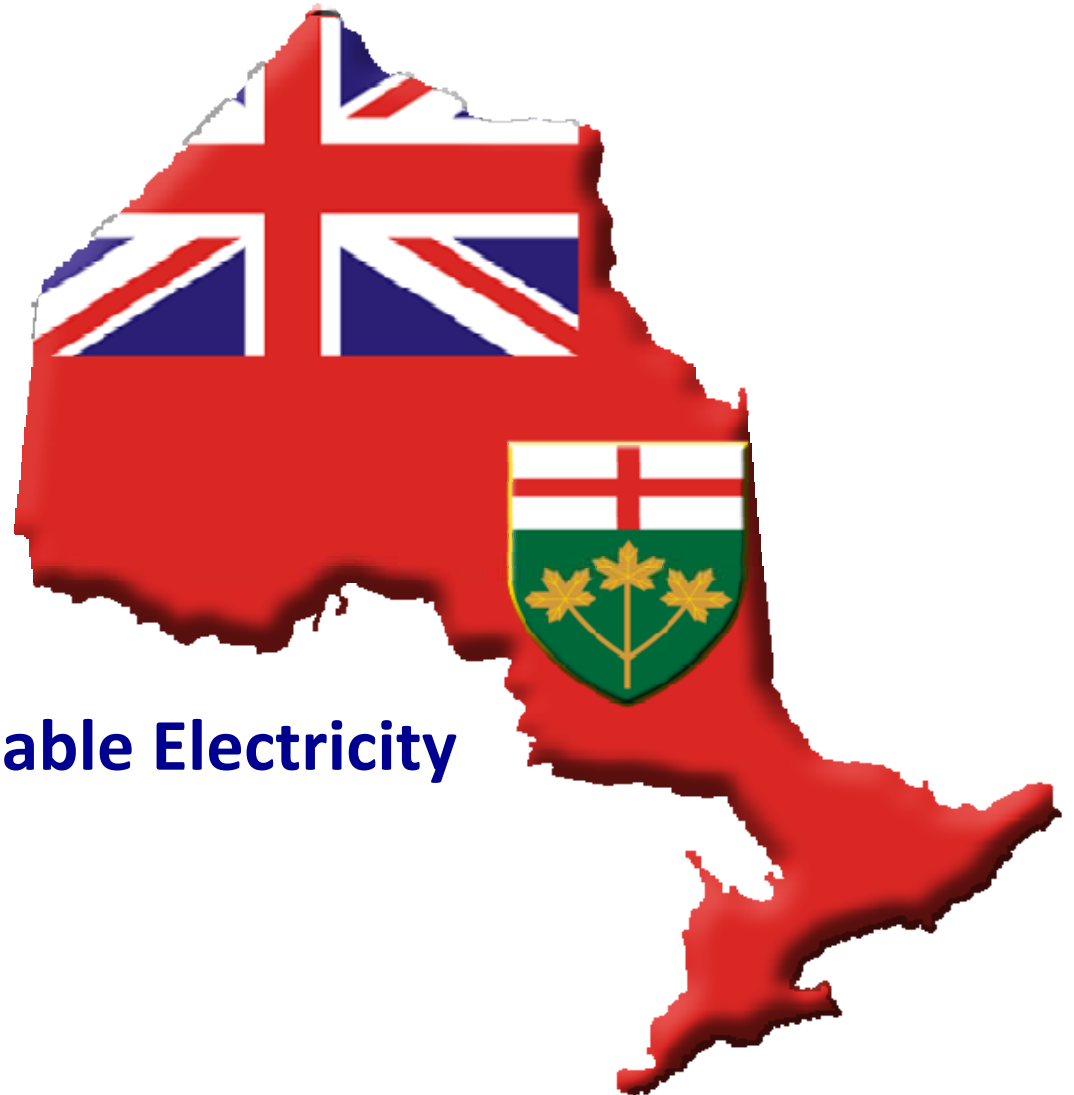
Final Thoughts...

- Ontarians guarded in their expectations about the future – especially jobs. Major contrast to optimistic West.
- Next Ontario election not yet sorted. Ballot question undefined, players not differentiated.
- While Ontarians concerned about the environment, not intense (or partisan) issue. Room to develop diversity of sources.
- Nuclear being punished by Fukushima – ironically, seen as technology of the past.
- Wind remains popular, in spite of local concerns.



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Council for Clean and Reliable Electricity

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