



Council for Clean and Reliable Energy

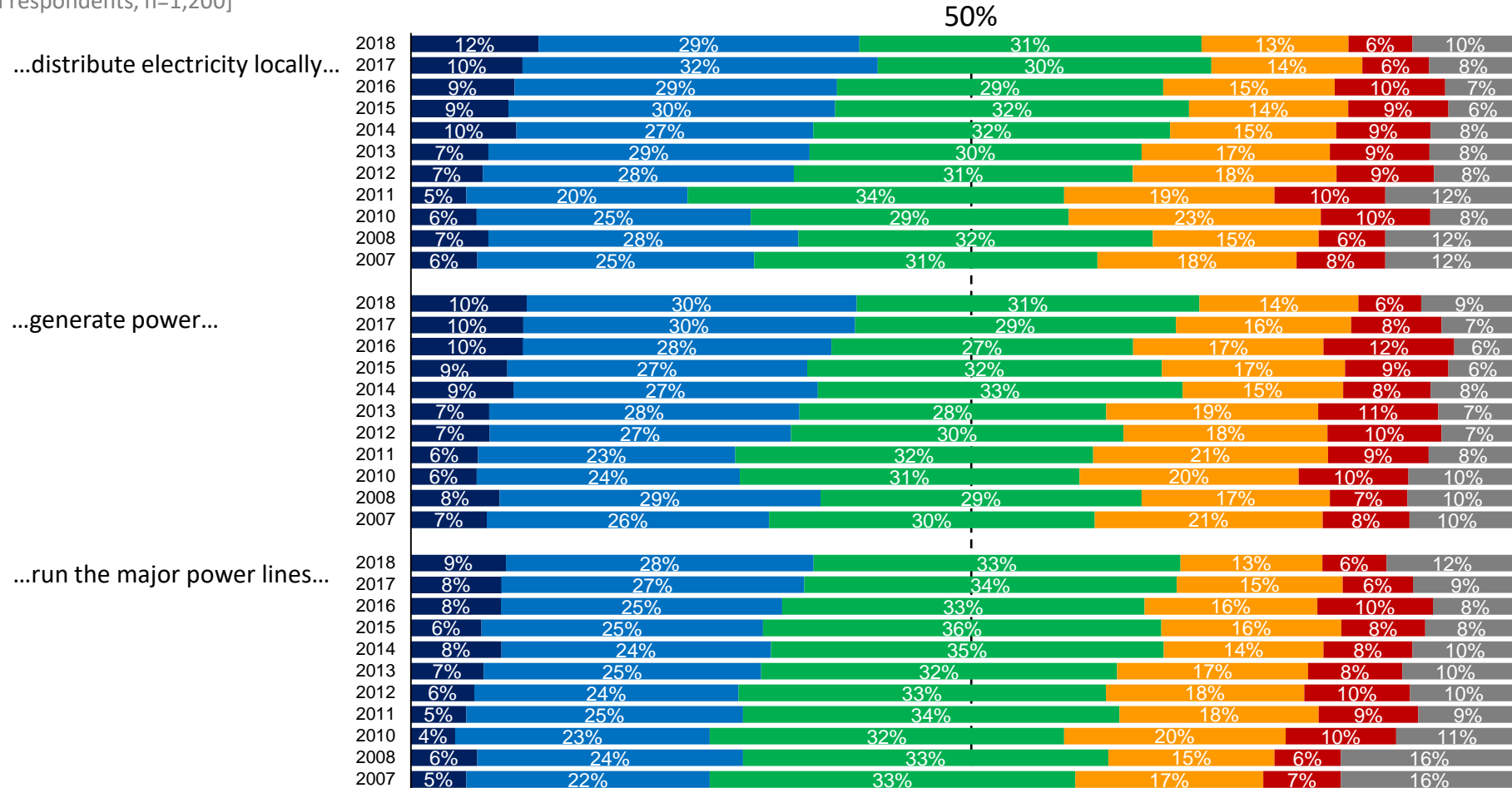
Electricity Players

Electricity companies all see improving trend over past 7 years



Below is a list of organizations of various types in your province. For each organization, please indicate whether you have a favourable or unfavourable impression or if you haven't really heard enough about it to have a firm impression? **Companies that ... in your province/community**

[asked of all respondents, n=1,200]



- Strongly favourable
- Somewhat favourable
- Neutral
- Somewhat unfavourable
- Strongly unfavourable
- Haven't heard enough to have a firm opinion



WINTER
IS
COMING

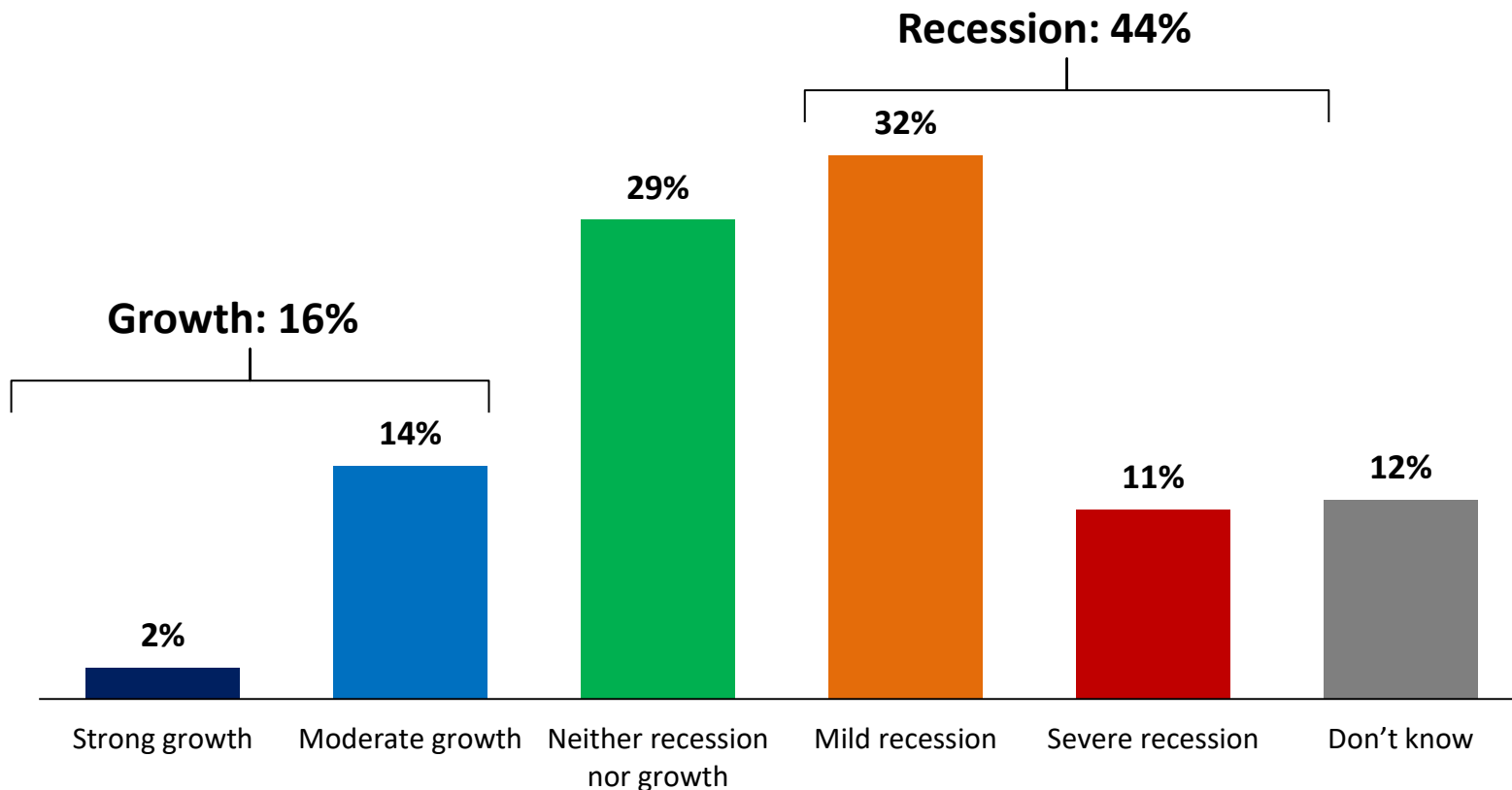
GAME OF THRONES

State of the Economy: 44% of respondents think Canada is headed into a recession, highest in Alberta at 56%



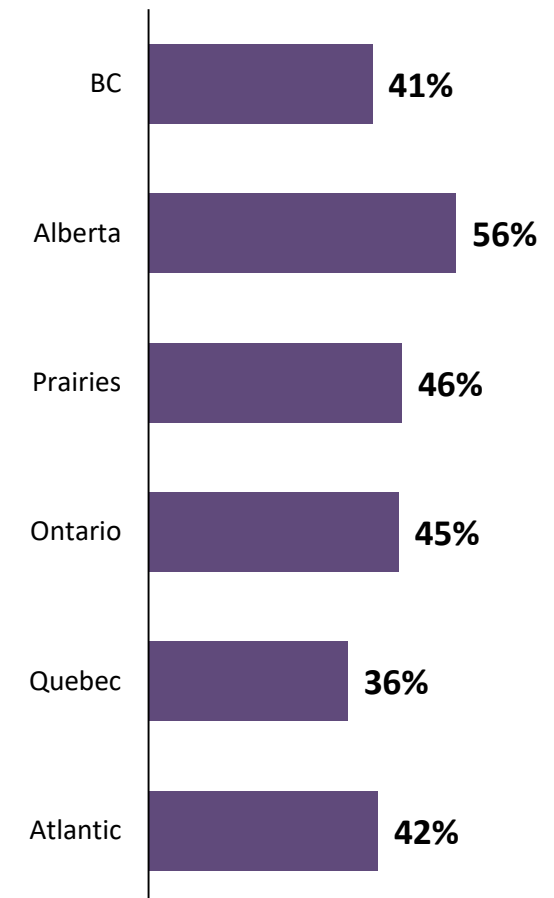
Do you feel the Canadian economy is moving into a period of recession or into a period of growth?

[asked of all respondents; n=1,200]



Segmentation

Recession



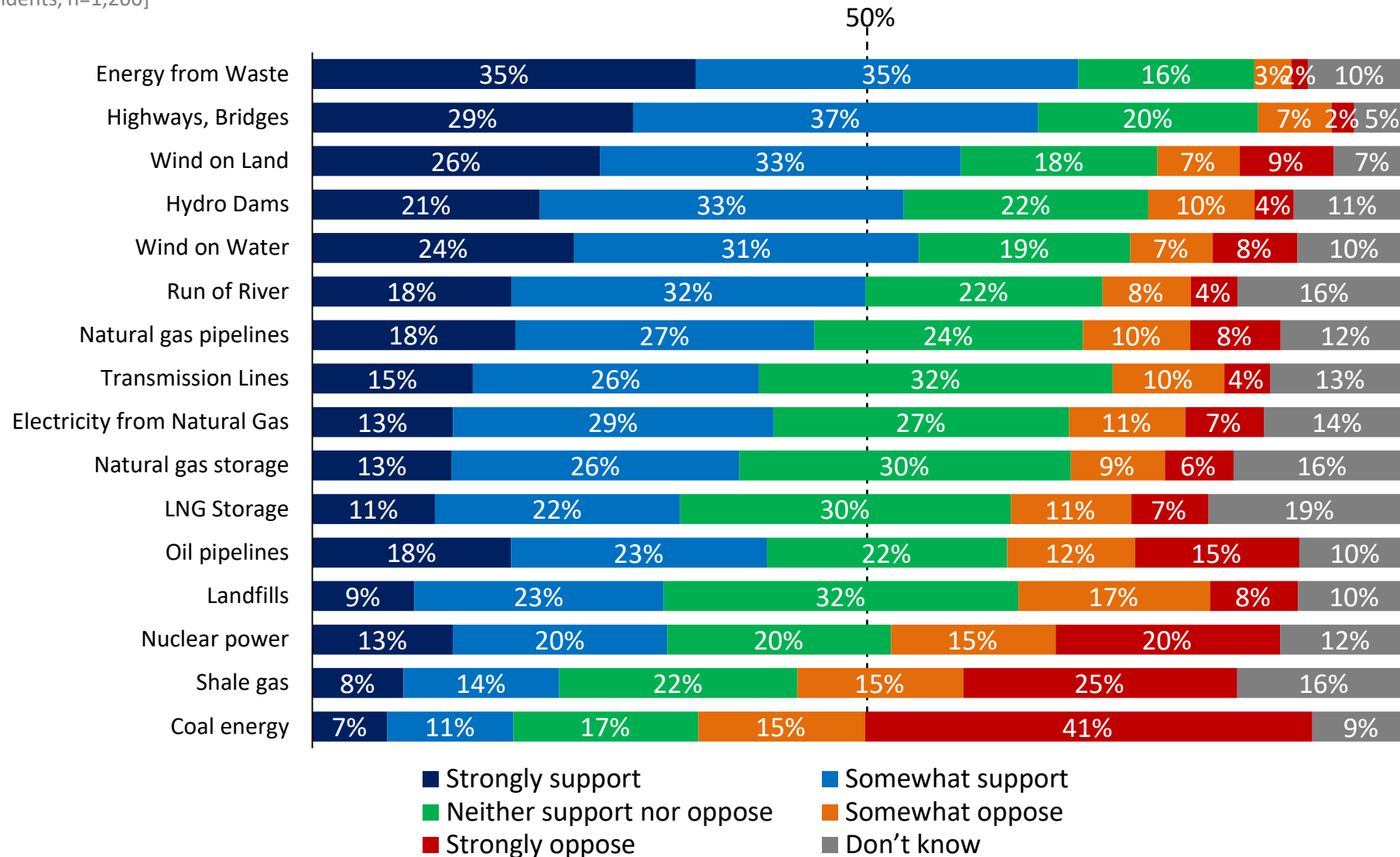
**Building things people
need, but may not like**

Most projects start out with a general openness



Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your **province**?

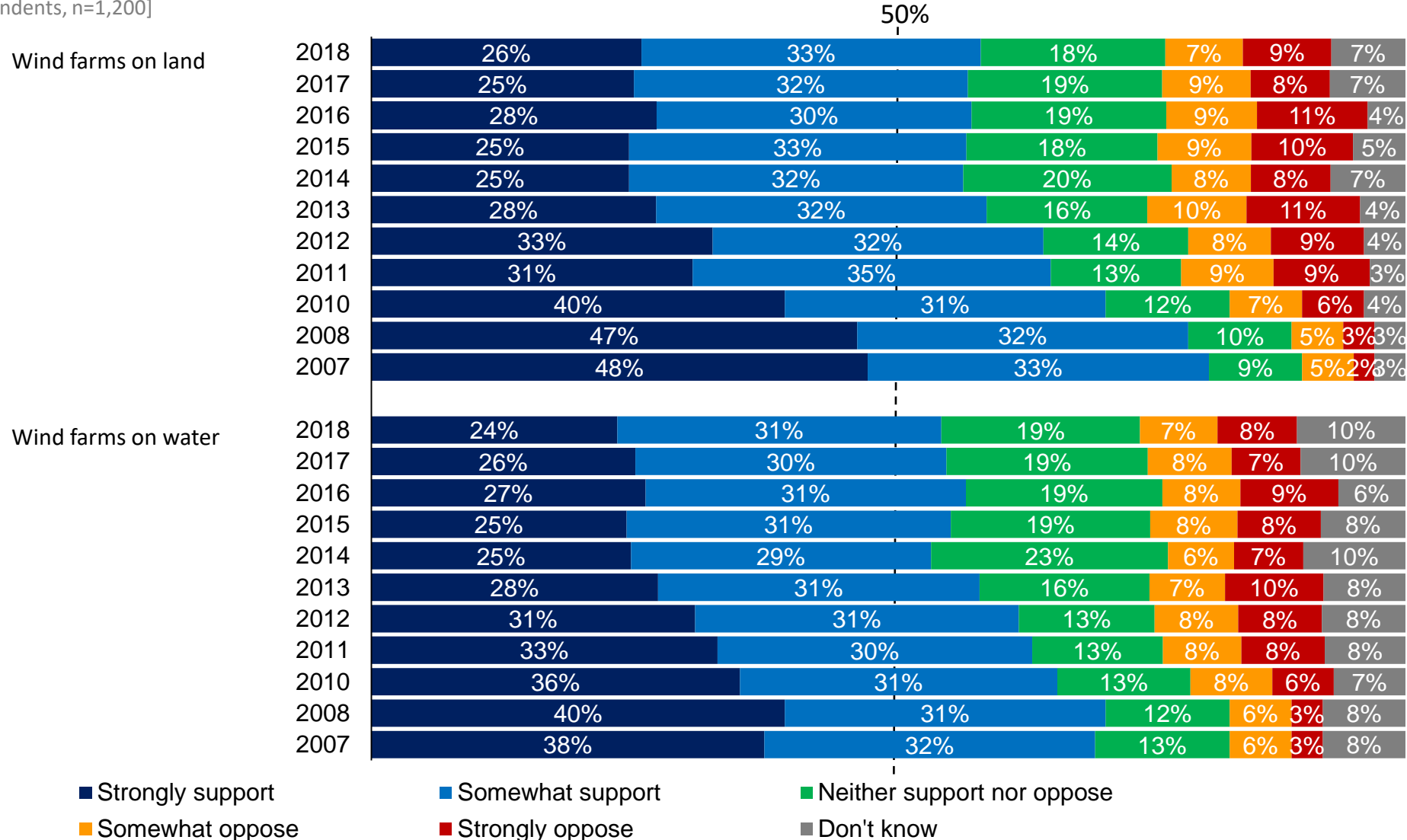
[asked of all respondents, n=1,200]



While most projects have fairly stable brands, wind took a major hit a decade ago



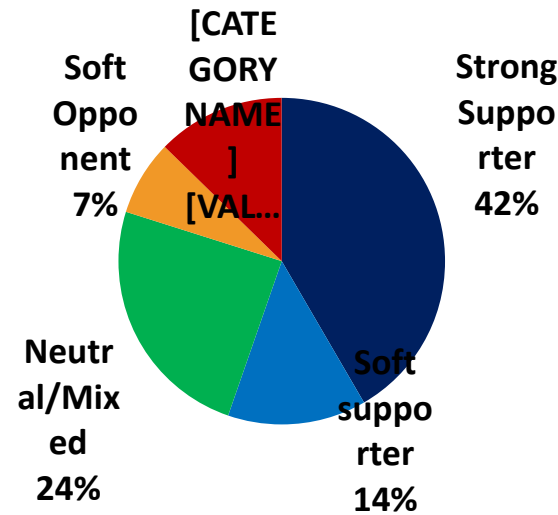
Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects in your province? [asked of all respondents, n=1,200]



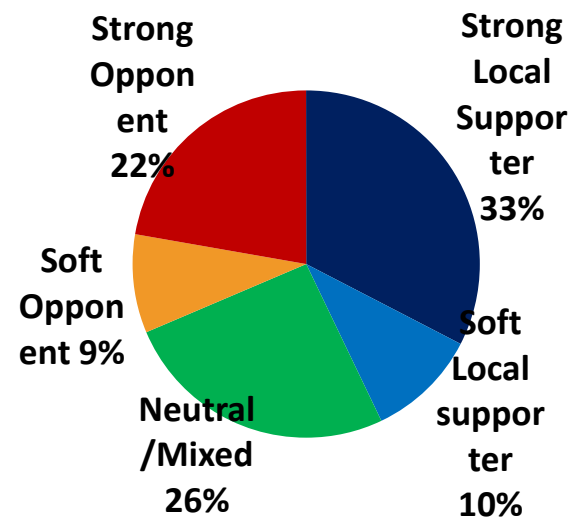
NIMBY is real, but more are consistent

Based on the difference in the support for projects built in the province and in their community, we create an NIMBY index to understand how NIMBY-ism the population is.

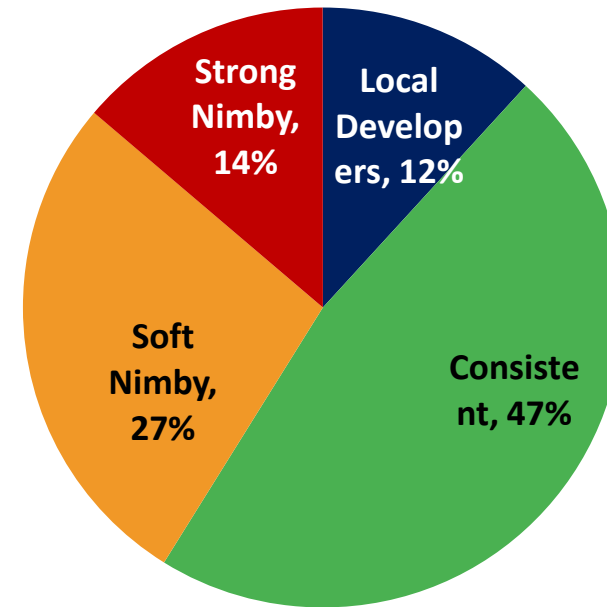
General Support for Project Index



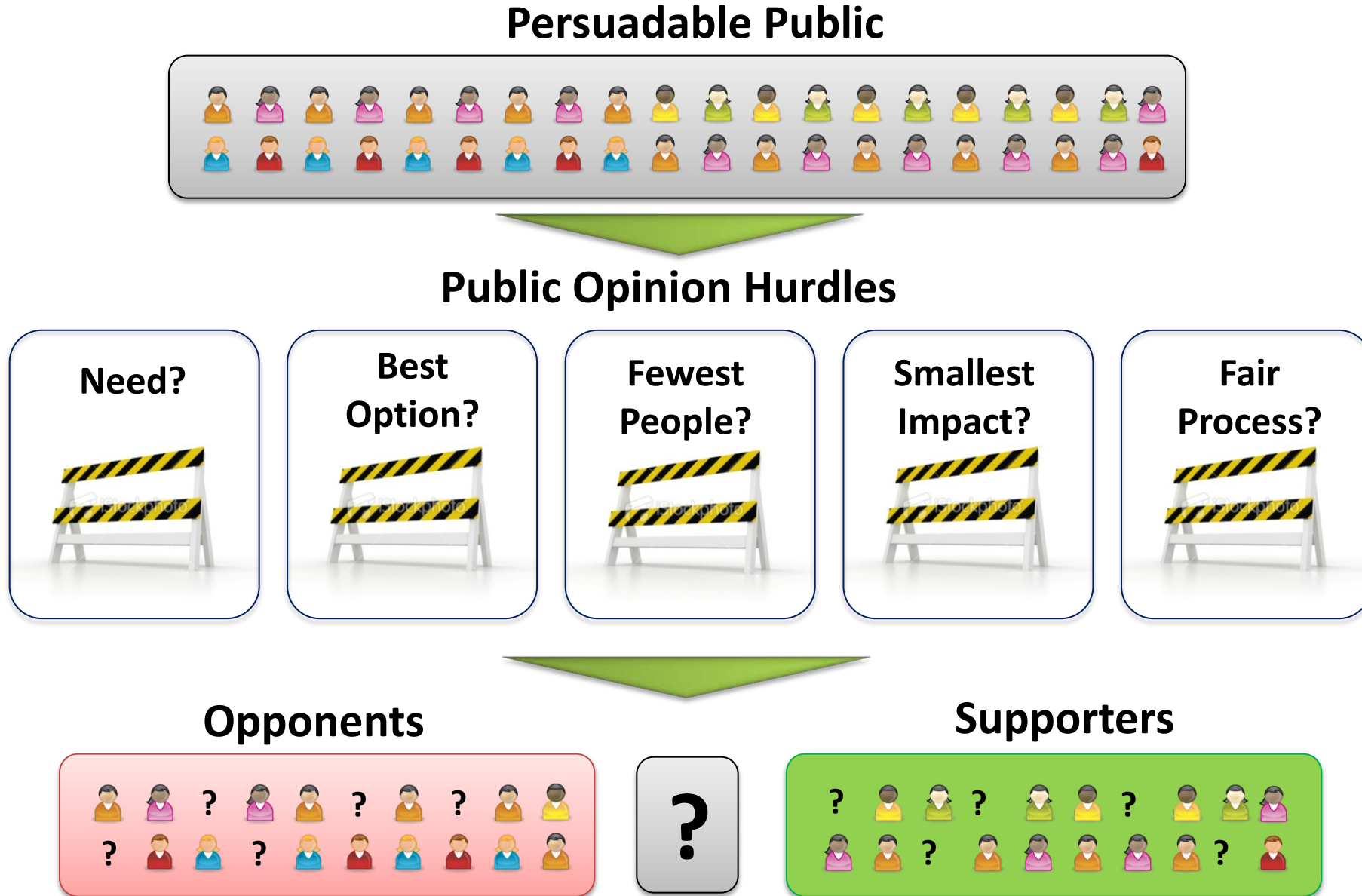
Local Support for Project Index



NIMBY Index [General support-Local support]



There is a core check list for building support

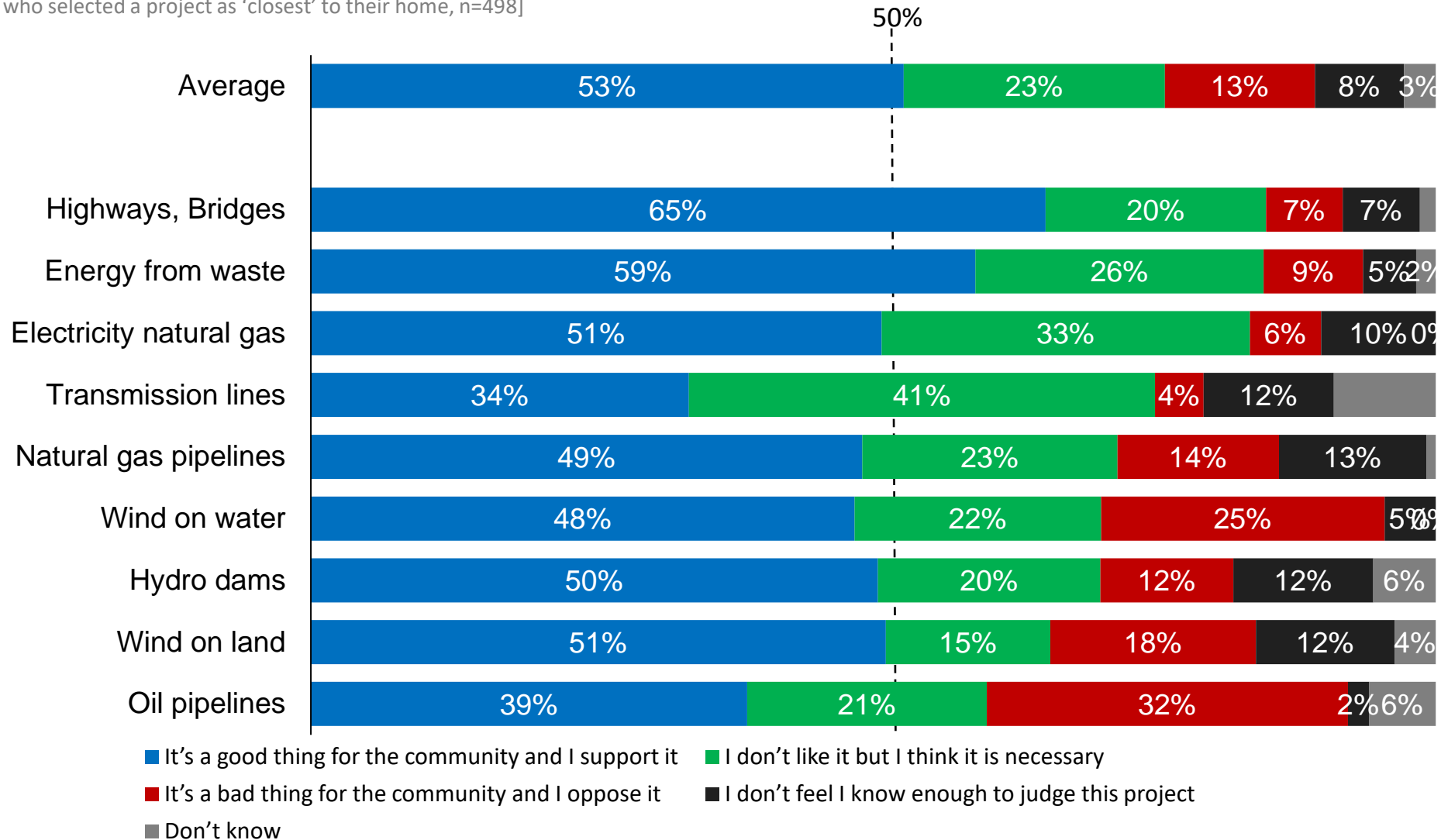


Real projects: overall permission at 76%; strong majority would permit highway/bridge projects, energy from waste



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

[asked of those who selected a project as 'closest' to their home, n=498]



Note: categories <N=20 (weighted) not shown.

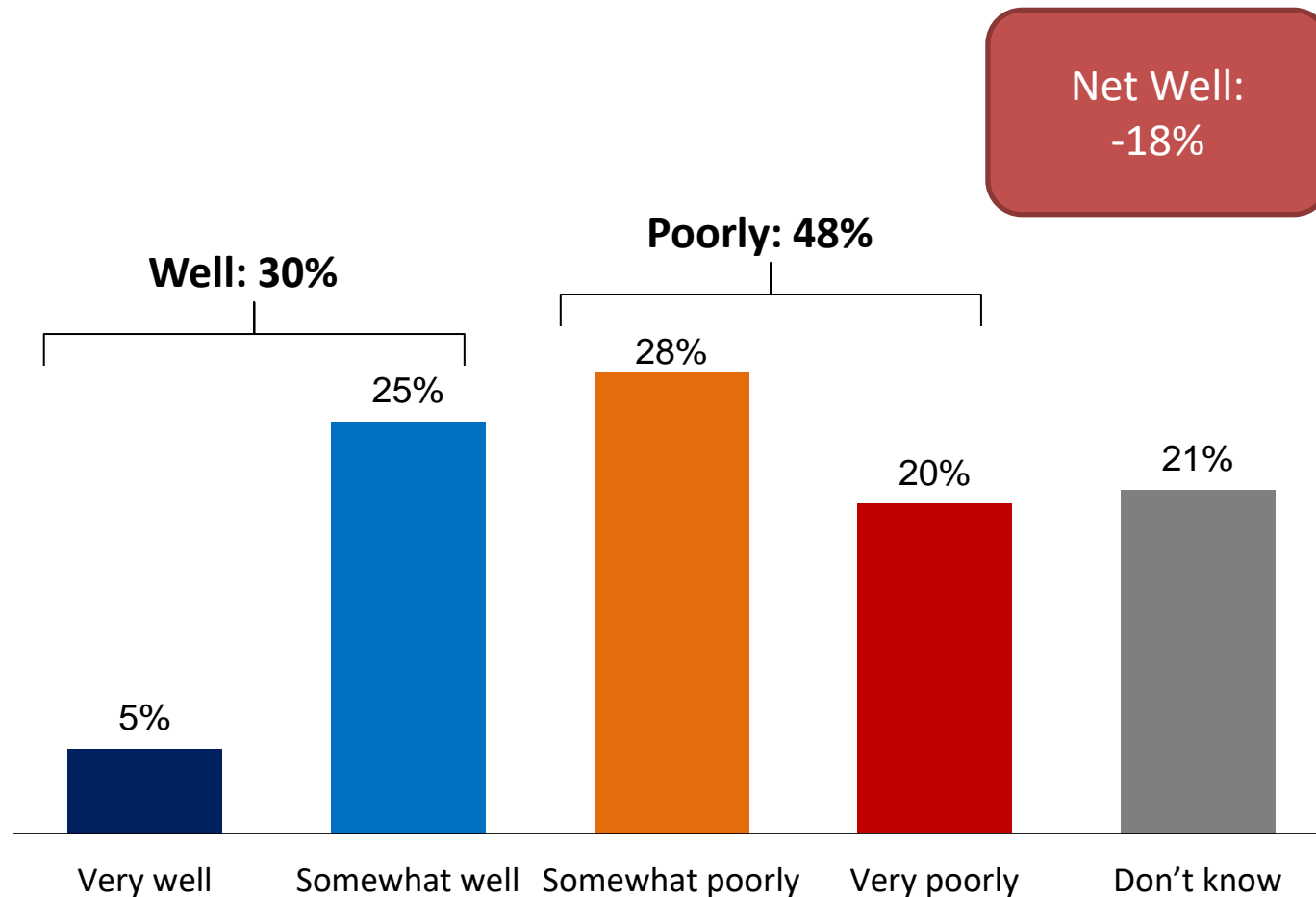
Getting Approvals

Approval Processes: Populist Conservatives and Albertans have the most negative view of the current system



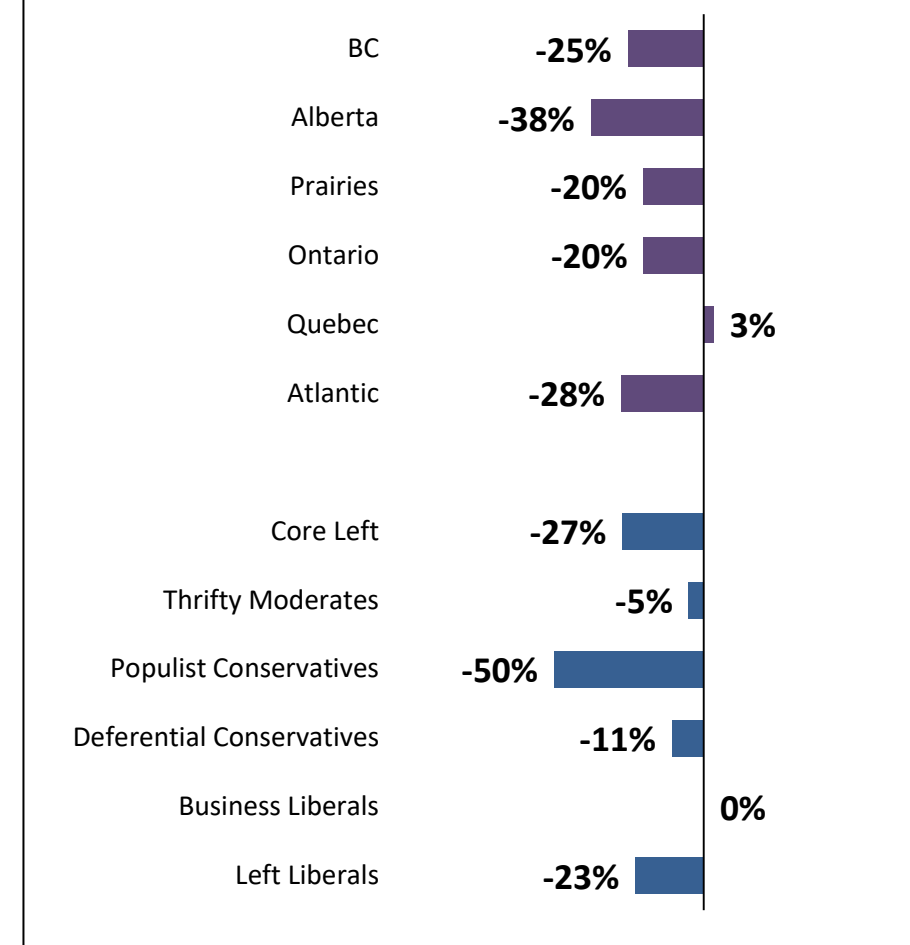
Thinking about the current approval process for natural resource development projects like pipelines, mines, or forestry, how well do you think the current system works?

[asked of all respondents, n=1,200]



Segmentation

Net Well



Note: Net well is [Total well]-[Total poorly]

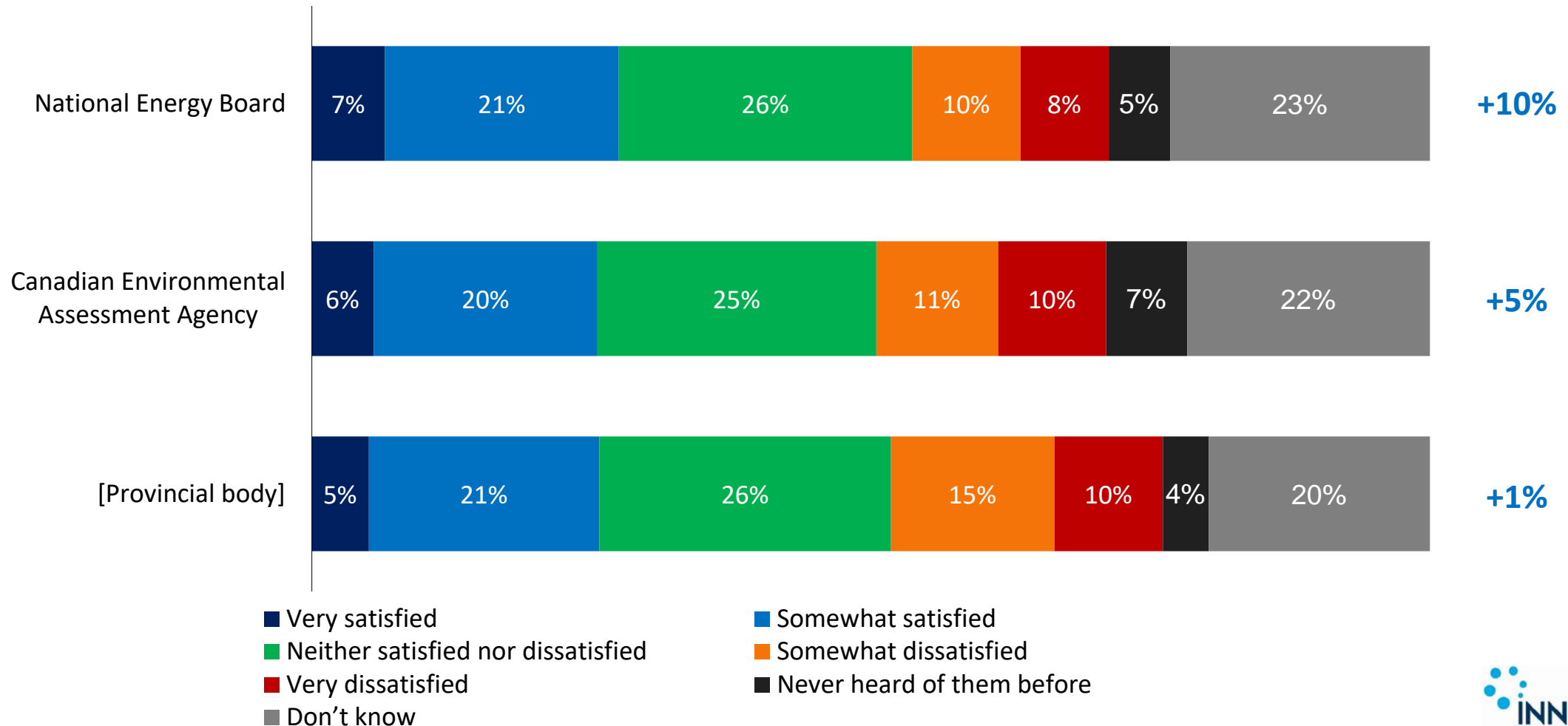
Regulators – Overall: Around half of respondents either have a neutral opinion or say “don’t know” about all three organizations



For each of the following organizations, please indicate how satisfied you are with the job they do at overseeing the energy industry in your province.

[asked of all respondents, n=1,200]

Net Satisfaction



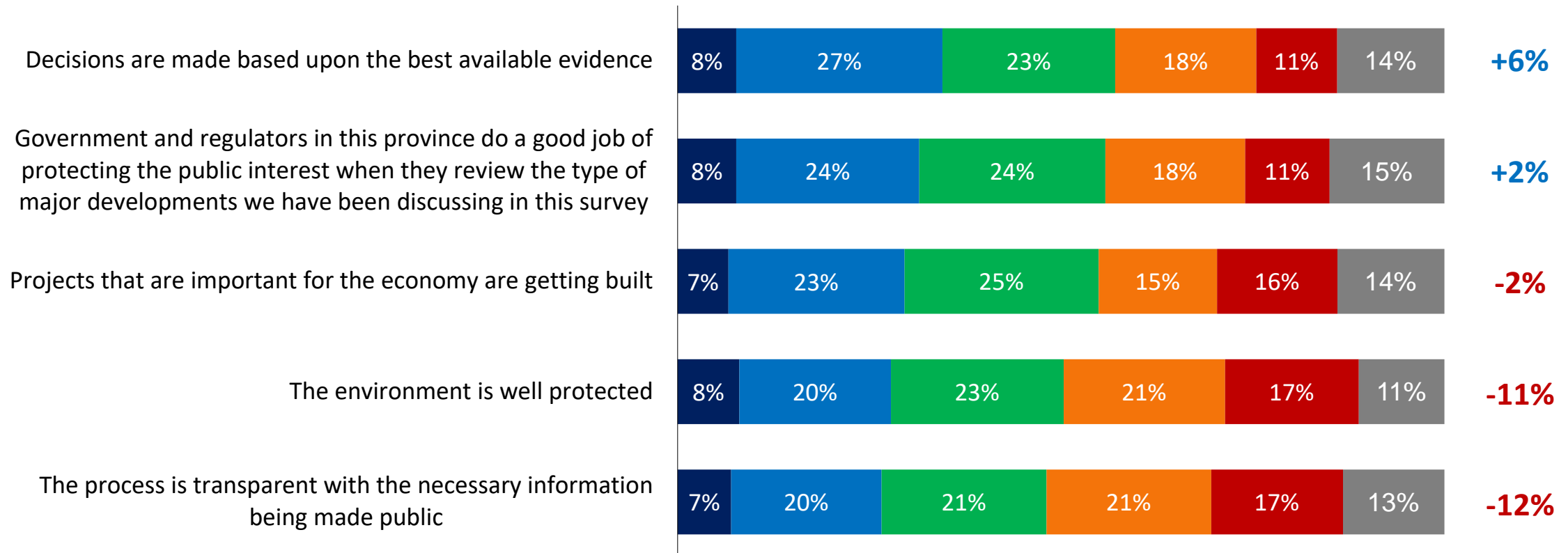
Beliefs Battery: Disagreement highest with statement that the process is transparent (net -12%)



Thinking of the regulatory organizations that approve the types of projects that we have been mentioned in this survey, do you agree or disagree with the following statements:

[asked of all respondents, n=1,200]

Net Agreement



Strongly agree

Somewhat agree

Neither agree nor disagree

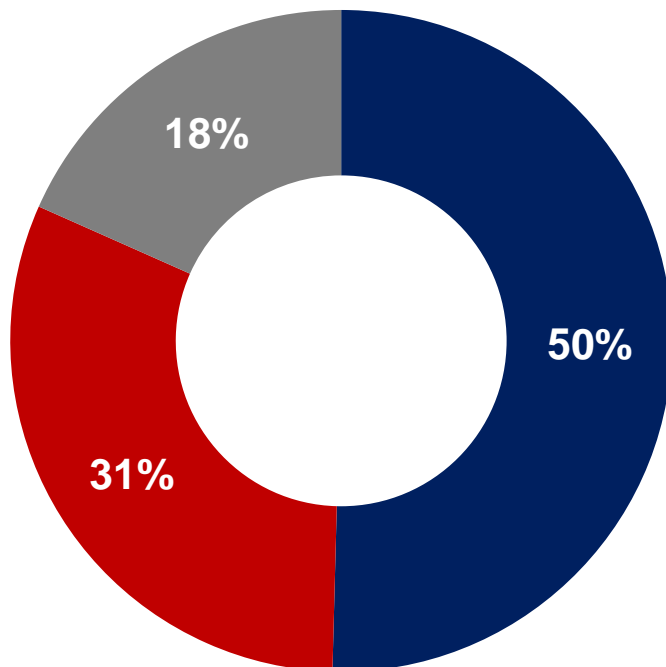
Somewhat disagree

Strongly disagree

Don't know

Length of Approval Processes: Half of respondents say process should be limited to a fixed period of time, including 74% of Populist Conservatives

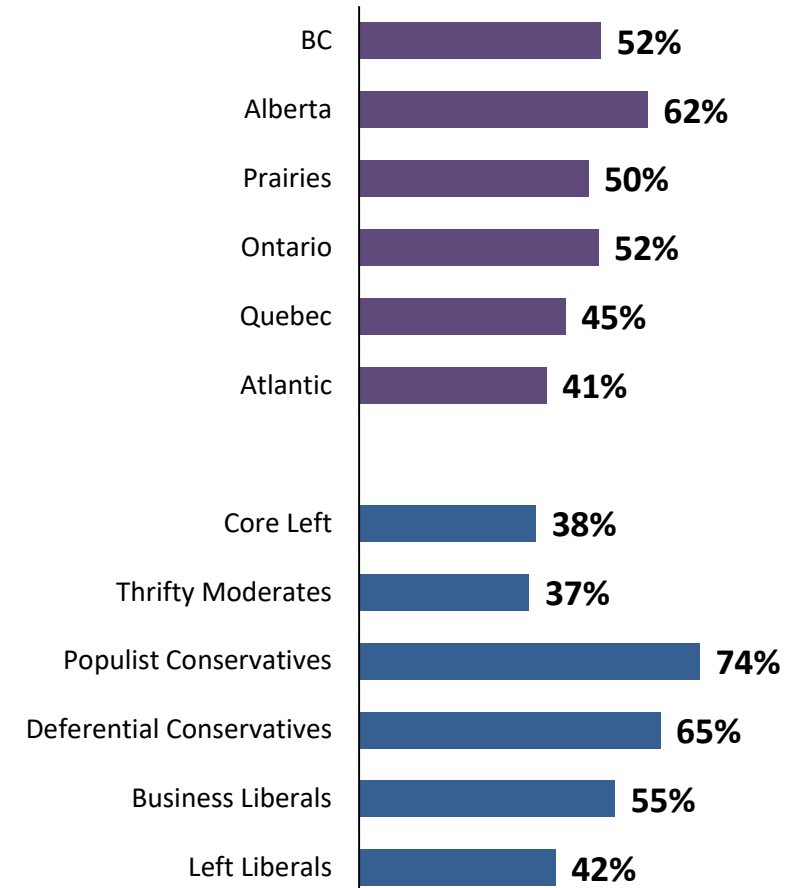
Q Thinking about who should have a say in the process of approving the types of projects in this survey, which of the following statements is closest to your own view?
[asked of all respondents, n=1,200]



- Processes should be limited to a fixed period of time so that everyone has certainty as to how long the process will take.
- Processes should keep going until everyone has had a chance to provide input and have their questions answered.
- Don't know

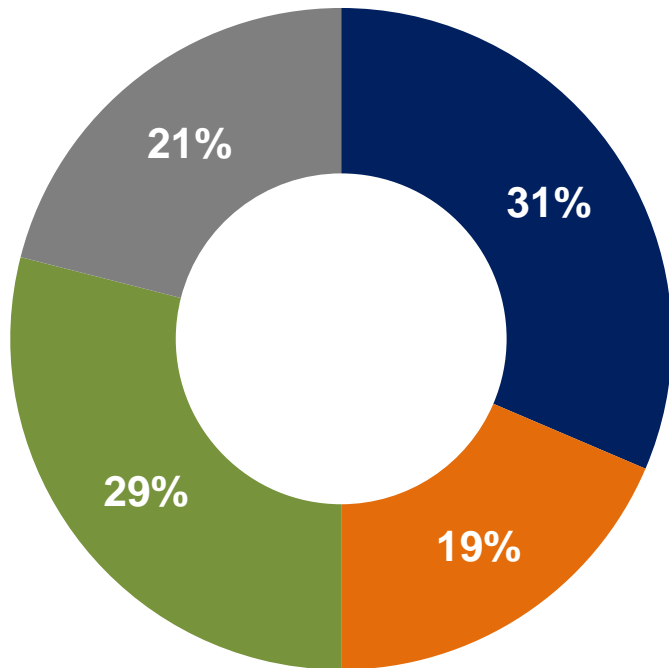
Segmentation

Fixed period of time



Changes to the system: Only 19% of respondents think the current system does a good job balancing considerations, but respondents split on how to change it

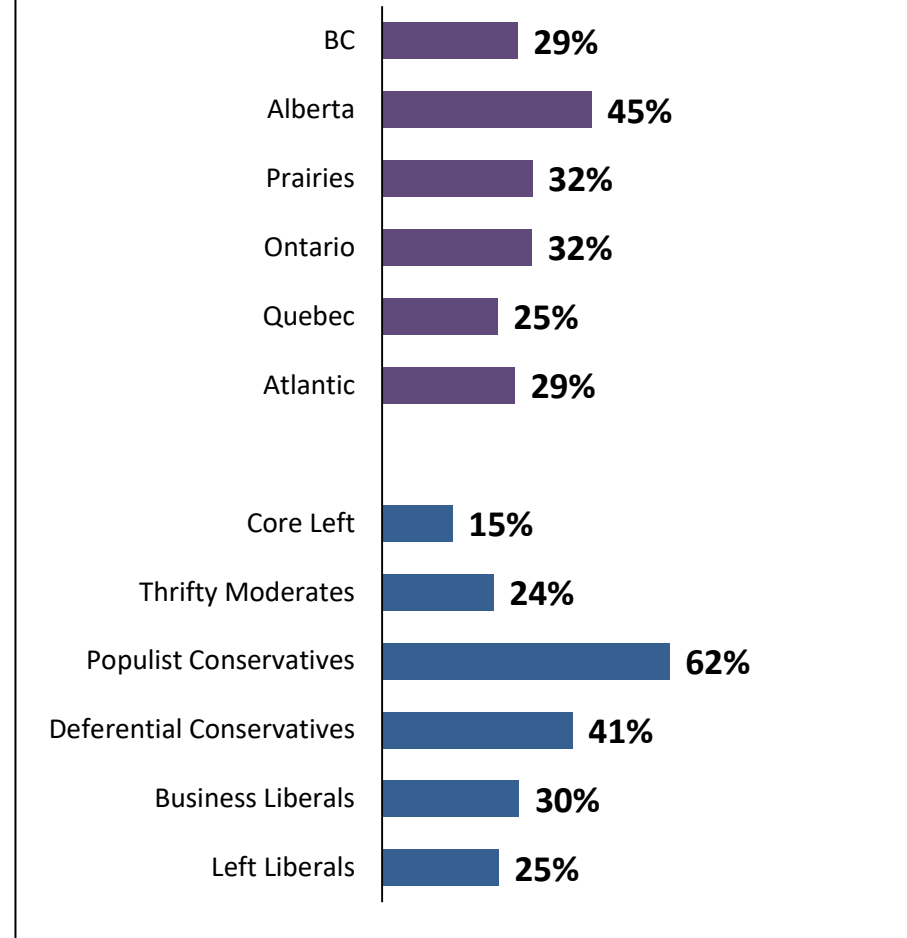
Q Approval processes for natural resource development projects like pipelines, mines, or forestry have to find the right balance between getting things built and protecting the environment. Which of the following comes closest to your point of view on the current process?
 [asked of all respondents, n=1,200]



- The process should be changed to give more attention to getting things built.
- The current approval process does a good job of balancing getting things built with protecting the environment.
- The process should be changed to give more attention to protecting the environment.
- Don't know

Segmentation

Getting things built

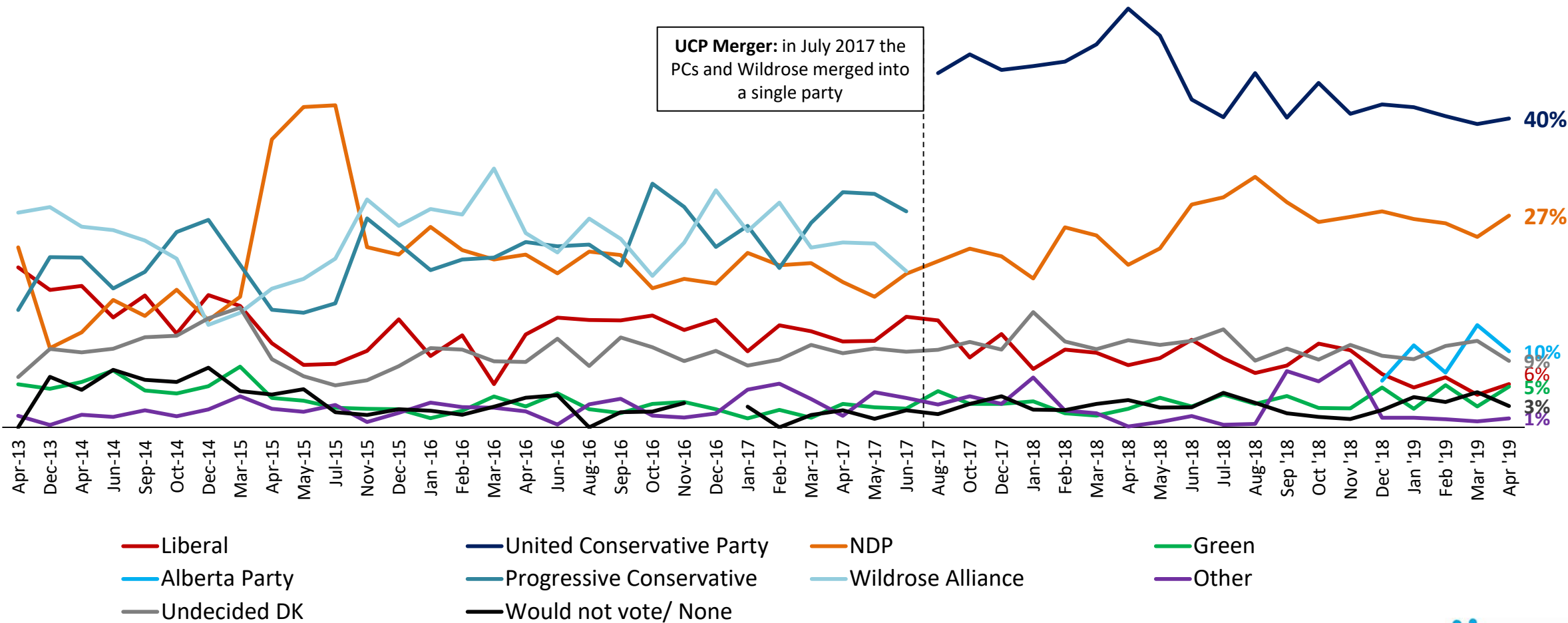


Alberta Politics

Combined Provincial Vote (AB): UCP steady at 40%, still well ahead of the NDP (27%)



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=500]

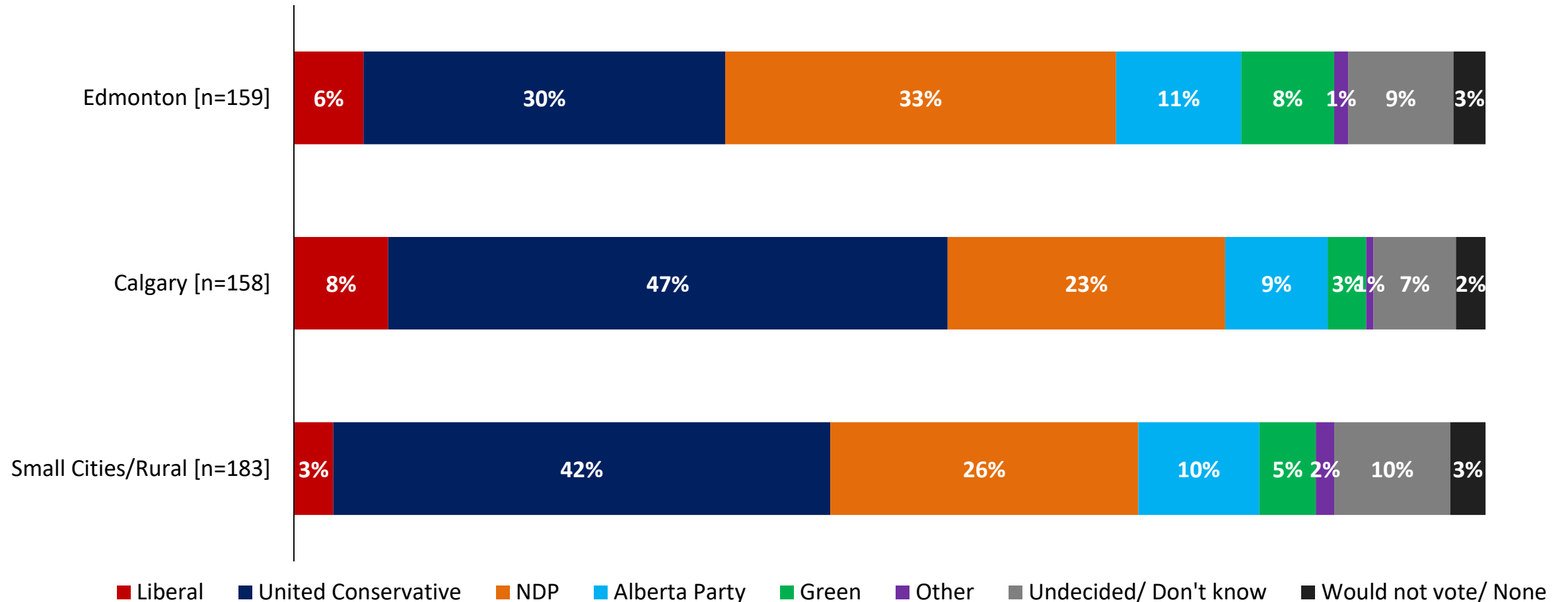


Note: Alberta Party included in 'other' until December 2018

Alberta Combined Vote: The UCP lead by a wide margin in Calgary and Small Cities/Rural, but tied with NDP in Edmonton

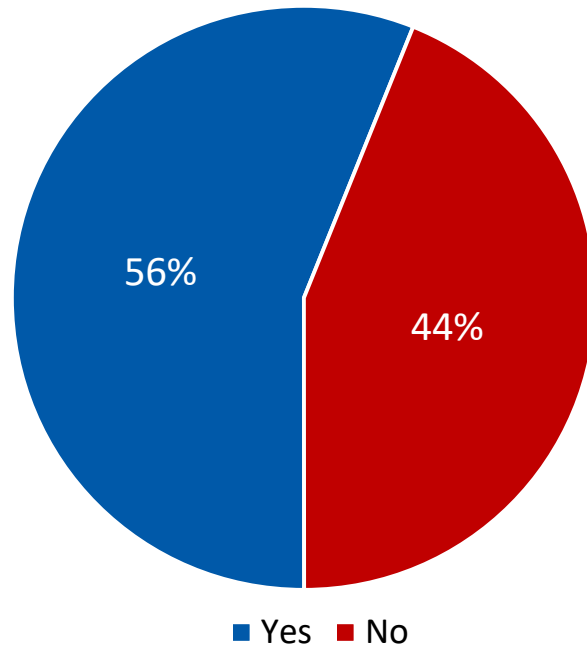


If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE+LEAN] BY Region

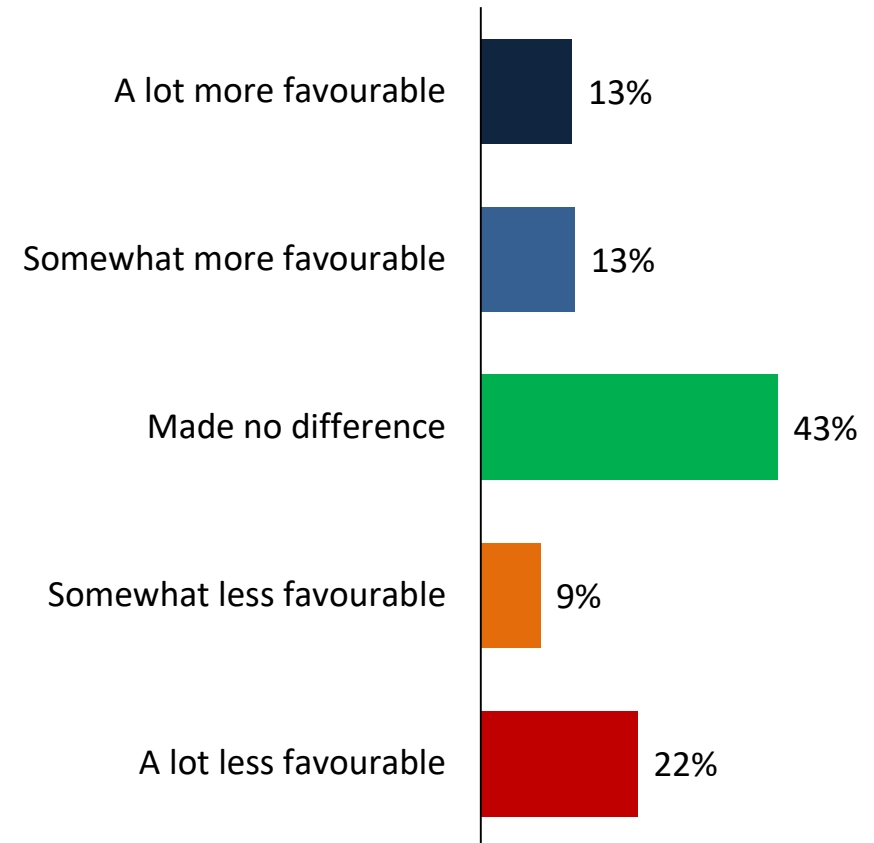


Notley RSH: Majority (56%) have RSH about Notley; on impact, plurality (43%) aren't changed, but 22% feel "a lot less favourable"

Q Have you read, seen or heard anything about Rachel Notley in the last few days?
[asked of all respondents; n=300]



Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Rachel Notley?
[respondents who have RSH, n=168]

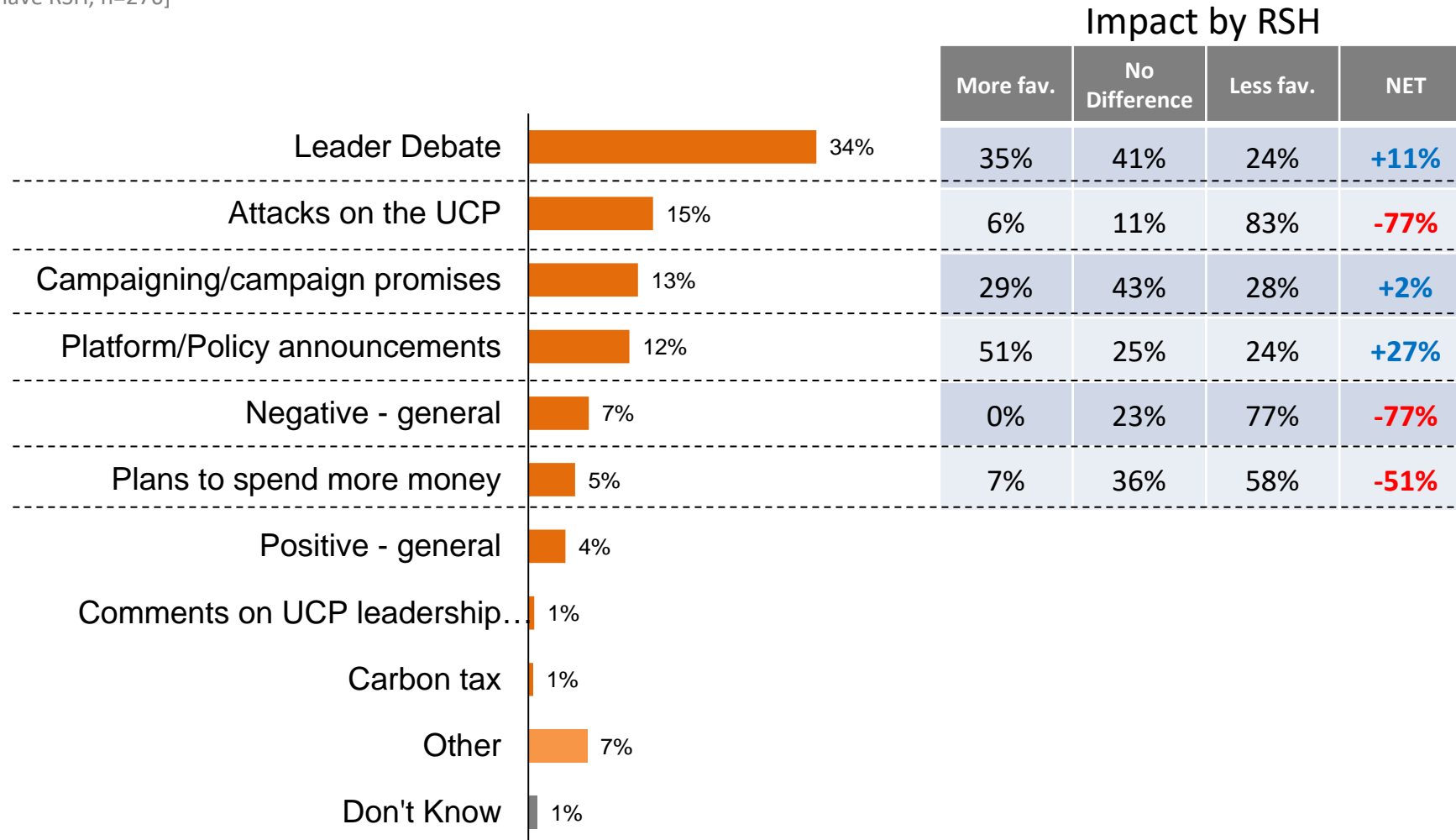


Notley RSH: 1-in-3 respondents cite the leader debate; net impact is weakly positive (+11%)



And what have you read, seen or heard about Rachel Notley in the last few days? Please be specific.

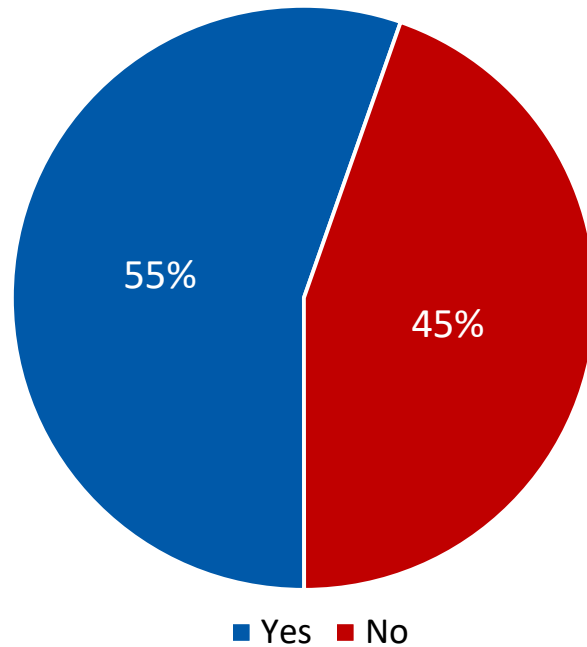
[respondents who have RSH, n=276]



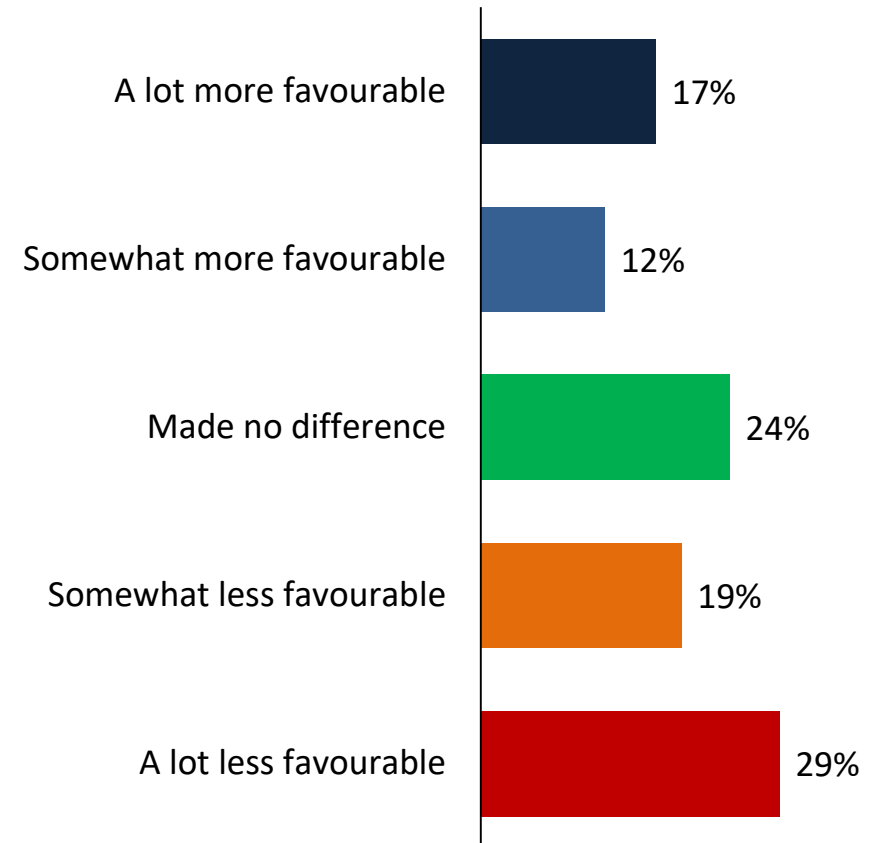
Note: Impact only shown for responses with unweighted N size of at least 15. Refused (1%) shown.

Kenney RSH: Majority (55%) have RSH about Kenney; on net, impact is negative with 3-in-10 (29%) who feel “a lot less favourable” towards him

Q Have you read, seen or heard anything about Jason Kenney in the last few days?
[asked of all respondents; n=300]



Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Jason Kenney?
[respondents who have RSH, n=166]

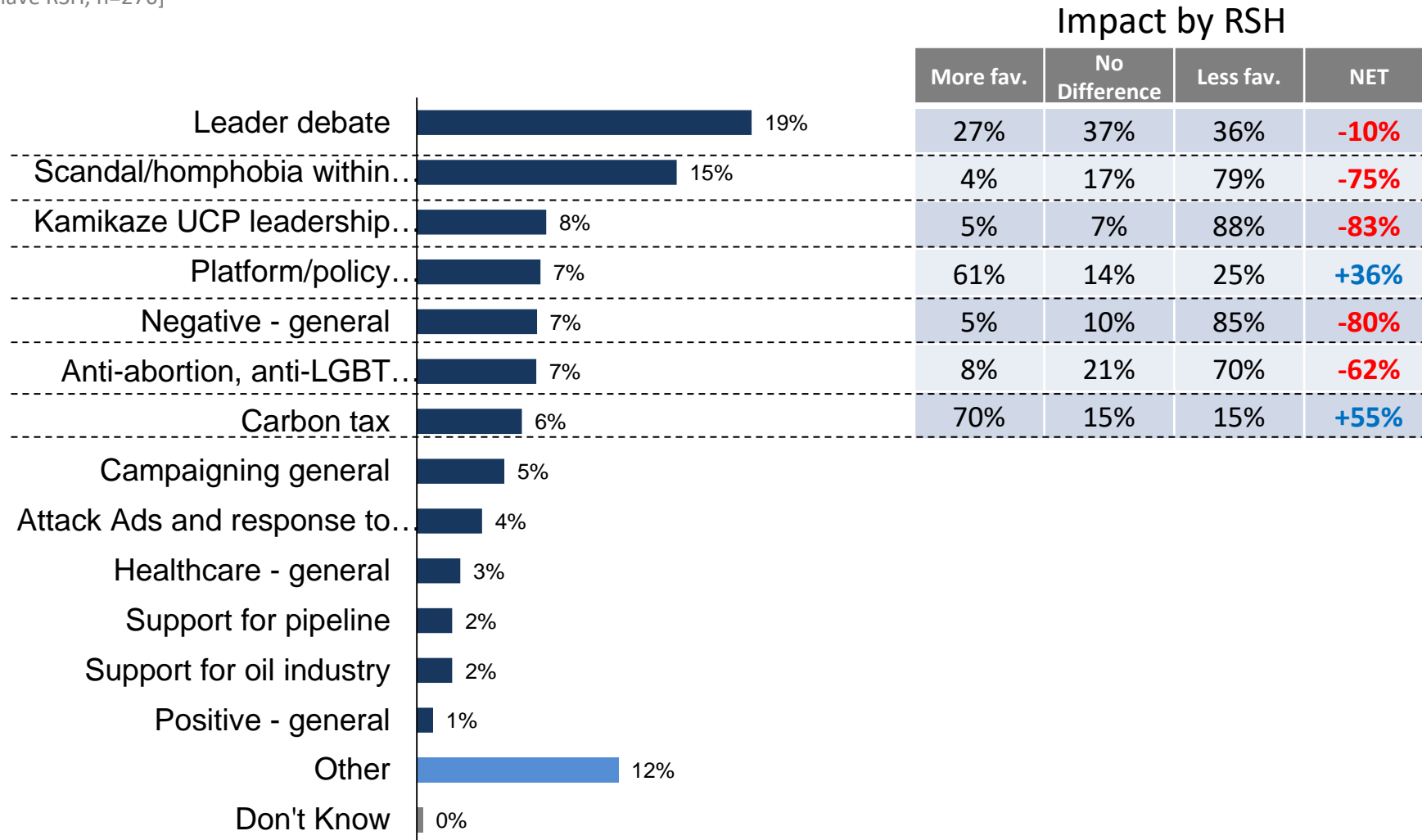


Kenney RSH: Most common RSH are the leader debate (19%) and scandals/homophobia within the UCP (15%)



And what have you read, seen or heard about Jason Kenney in the last few days? Please be specific.

[respondents who have RSH, n=276]



Note: Impact only shown for responses with unweighted N size of at least 15. Refused (2%) shown.

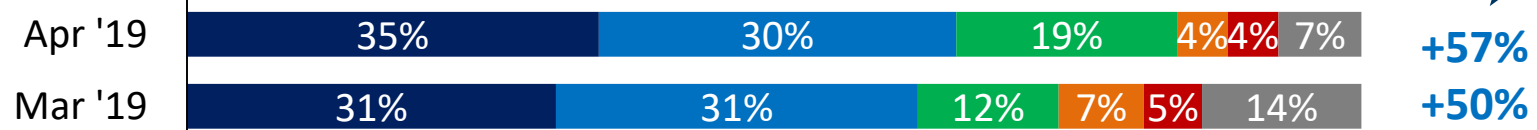
Political Attitudes: 45% of Albertan respondents 'strongly agree' that it is time for a change in government



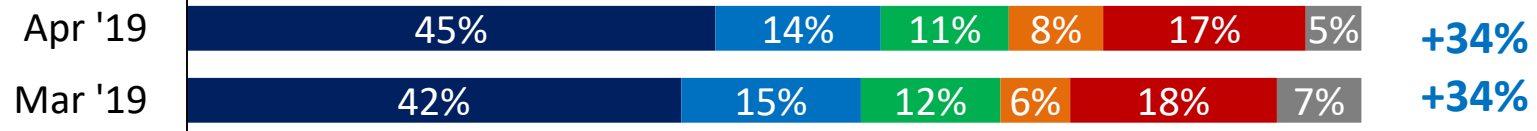
Do you agree or disagree with the following statements?
[asked of all respondents; n=500]

Net Agreement

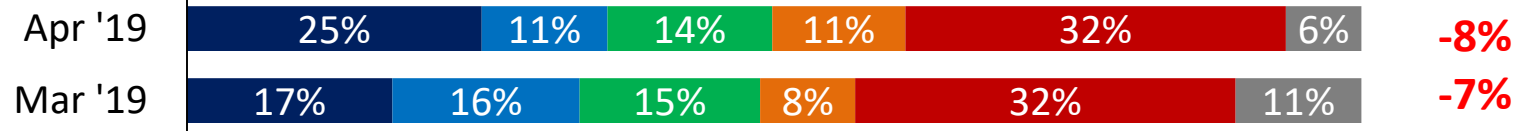
Alberta politics is really a two-horse race, only the United Conservative Party and the NDP have a real chance of forming government.



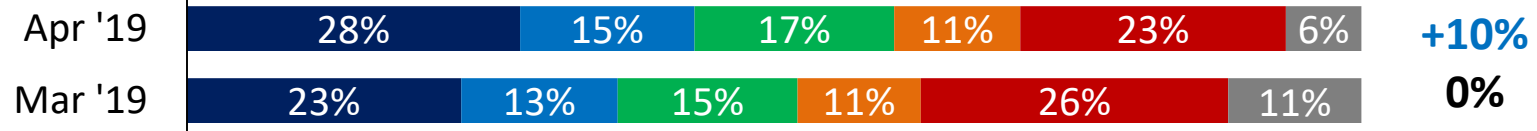
It's time for a change in government here in Alberta.



The NDP may have its problems, but it is still the party best able to run the government here in Alberta.



The United Conservative Party is too extreme for me.



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

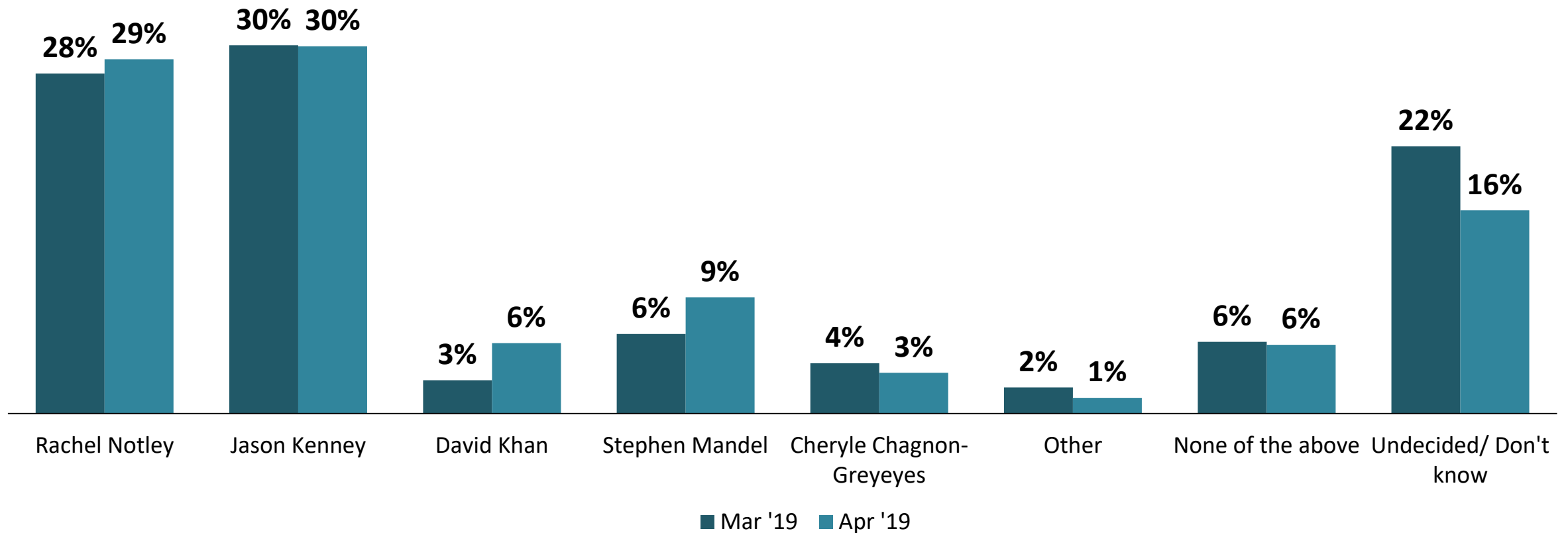


Best Premier: Notley (29%) and Kenney (30%) tied for best Premier; 16% are undecided, down 6 points since March



Which of the following leaders would make the best Premier of Alberta?

[asked of all respondents; n=500]

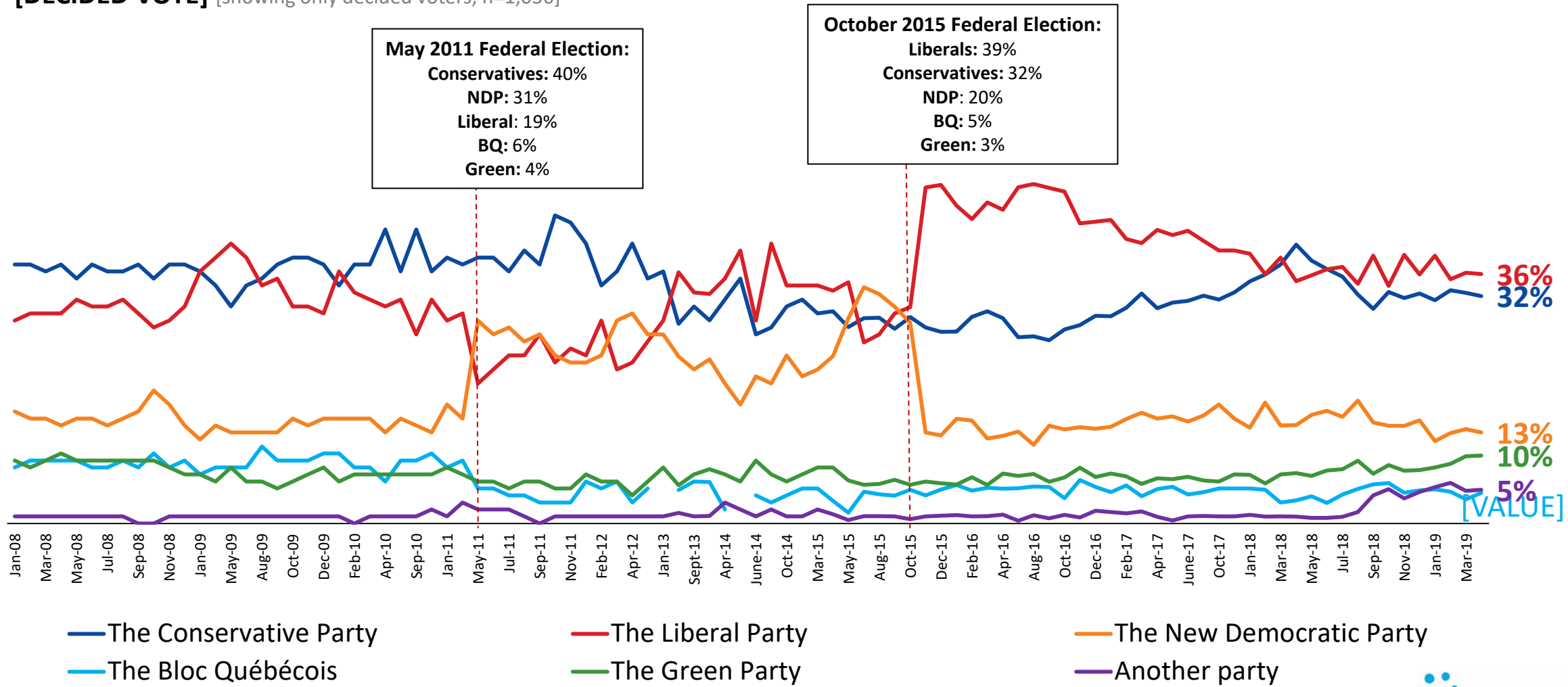


Federal Politics

Decided Federal Vote: Liberals (36%) and Conservatives (32%) remain close; NDP (13%) and Greens (10%) trailing



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly?
[DECIDED VOTE] [showing only decided voters; n=1,036]

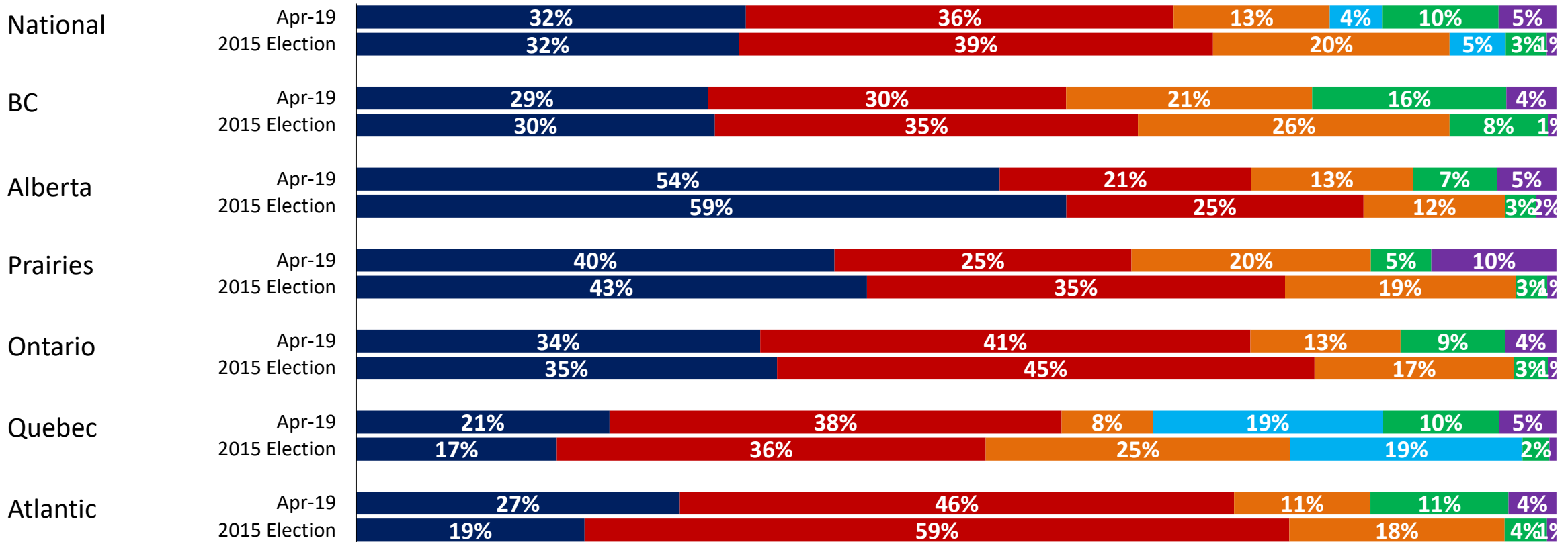


Note: People’s Party of Canada has been added since September 2018, included in ‘Another party’.

Decided Federal Vote by Region: Liberals are down in every region except Quebec; in BC now tied with the Conservatives



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly?
[DECIDED VOTE] [asked of all respondents]



■ The Conservative Party ■ The Liberal Party ■ The New Democratic Party ■ The Bloc Québécois ■ The Green Party ■ Another party

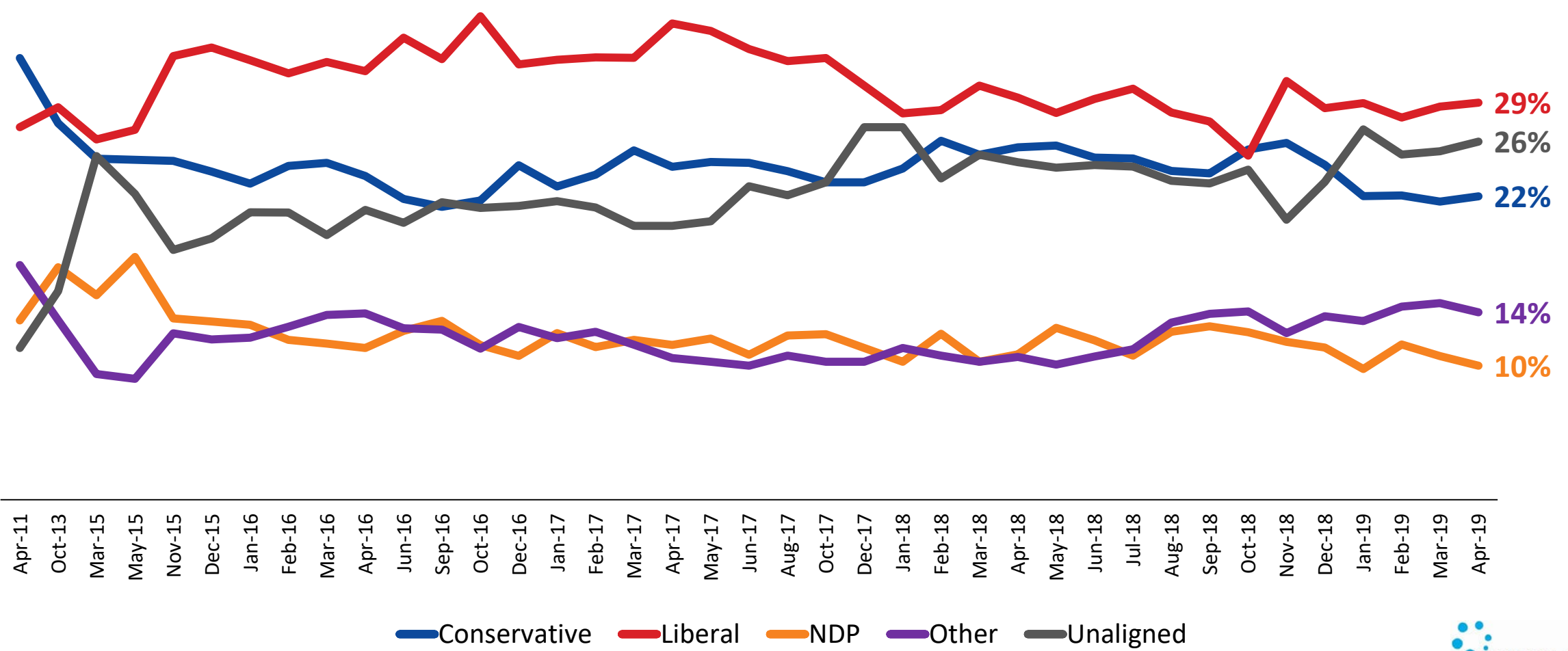


Note: The "2015 Election" results are obtained from Elections Canada.

Federal Party ID: Liberal ID (29%) remains ahead of Conservative ID (22%); one-in-four (26%) are unaligned



Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents]

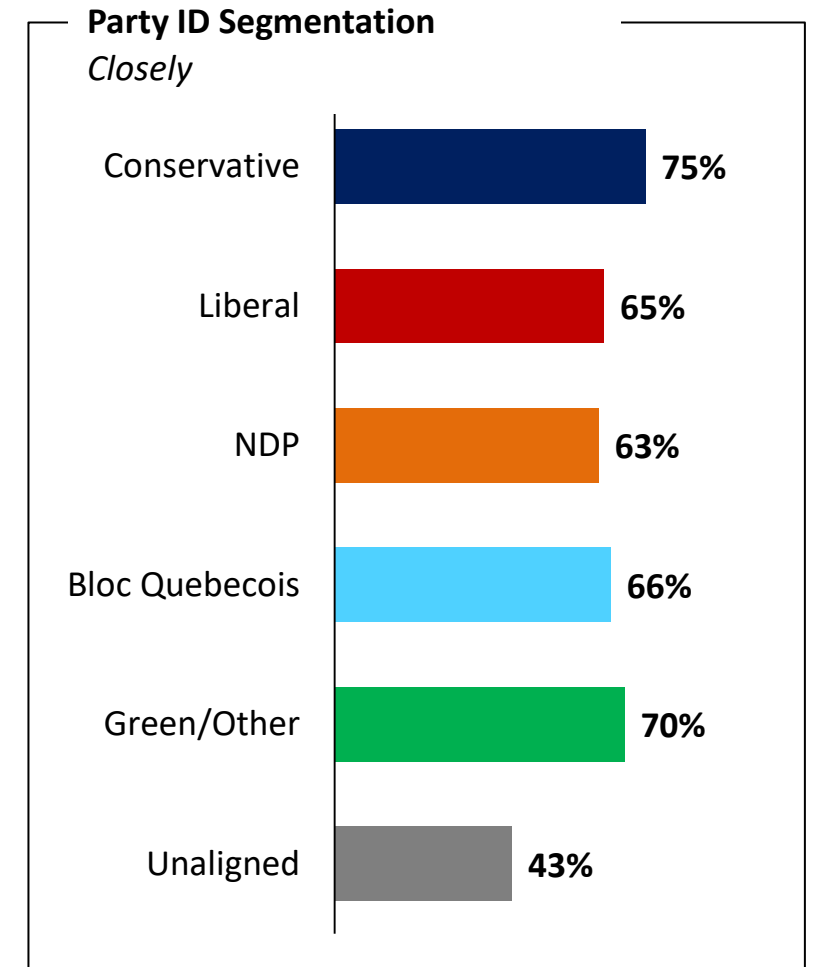
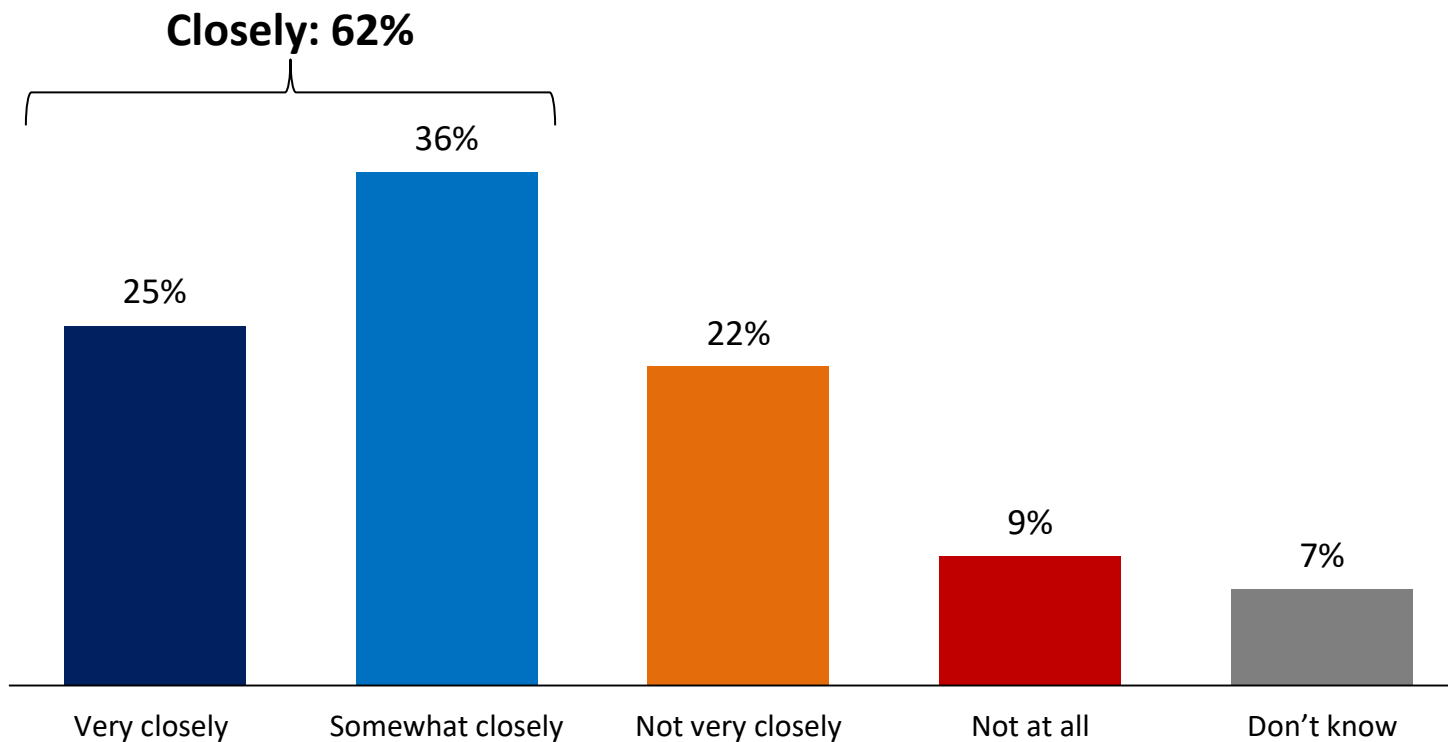


Attention: More than 6-in-10 of all partisan groups have been following closely; only 43% of those who are unaligned are following closely



How closely have you been following the news about attempted bribery and fraud by SNC-Lavalin and allegations that the Prime Minister's Office pressured the Attorney General Jody Wilson-Raybould to negotiate remediation without going to court?

[asked of all respondents, n=1,200]

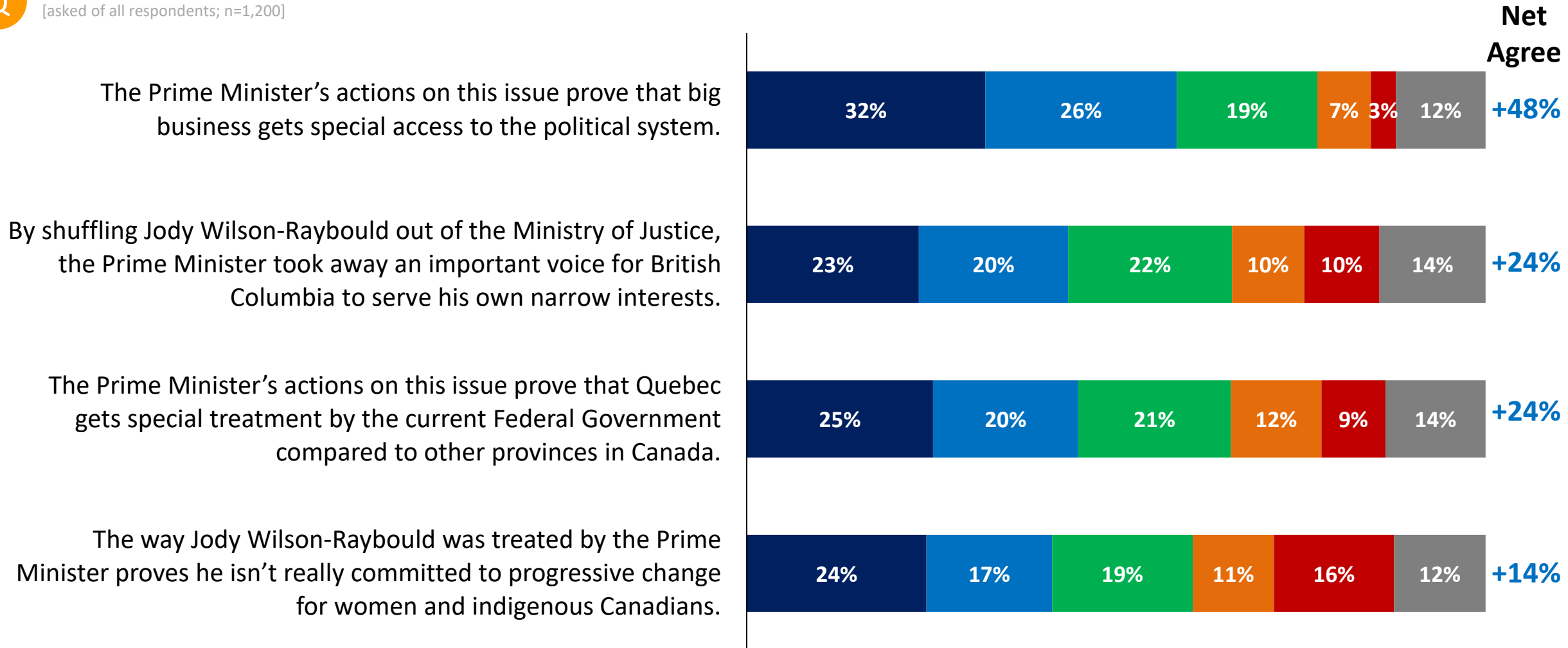


Beliefs: More than half of respondents agree that the Prime Minister's actions show that big business gets special access to the political system



Do you agree or disagree with the following statements?

[asked of all respondents; n=1,200]



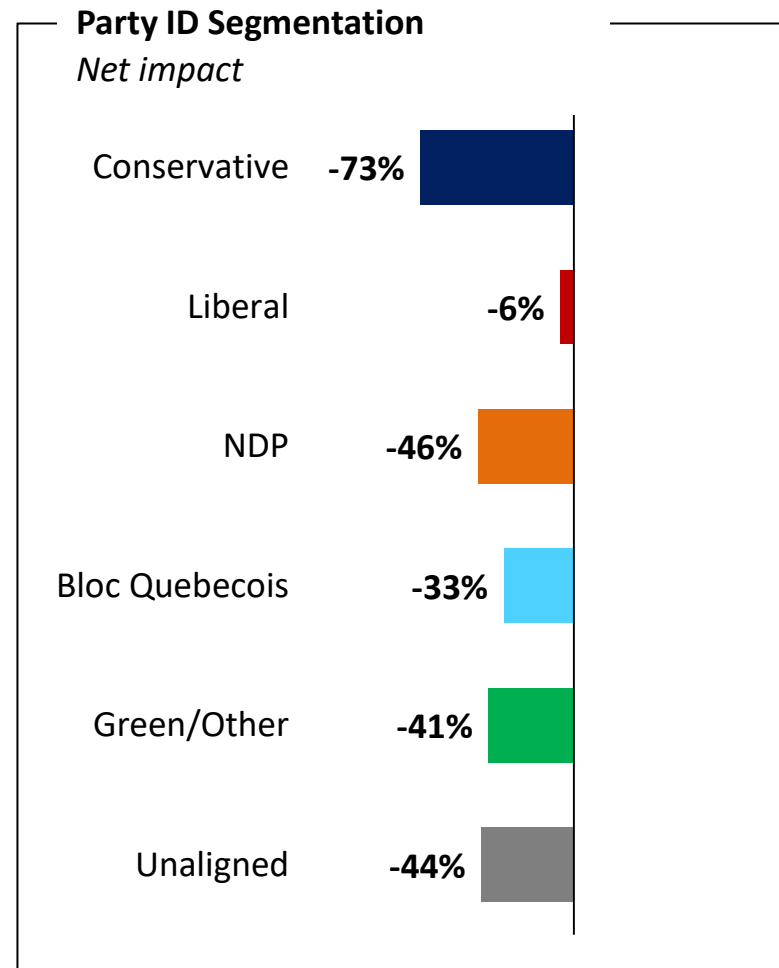
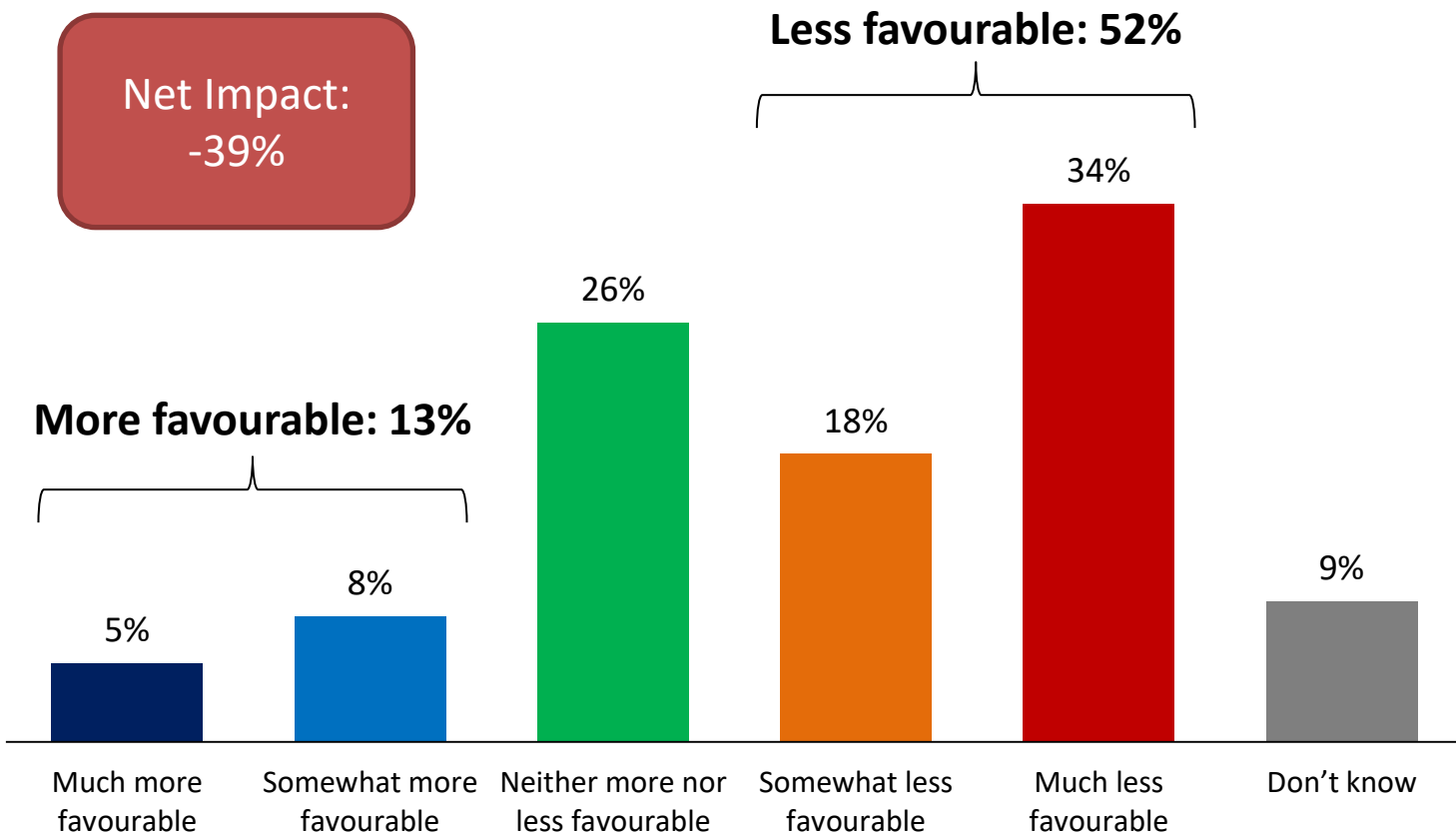
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

Impact on Liberal Party: Impact on the Liberal Party is strongly negative with a majority saying the issue left them feeling less favourable towards the LPC



Has what you have heard about this issue left you feeling more or less favourable towards Justin Trudeau and the Liberal Party of Canada?

[asked of all respondents, n=1,200]



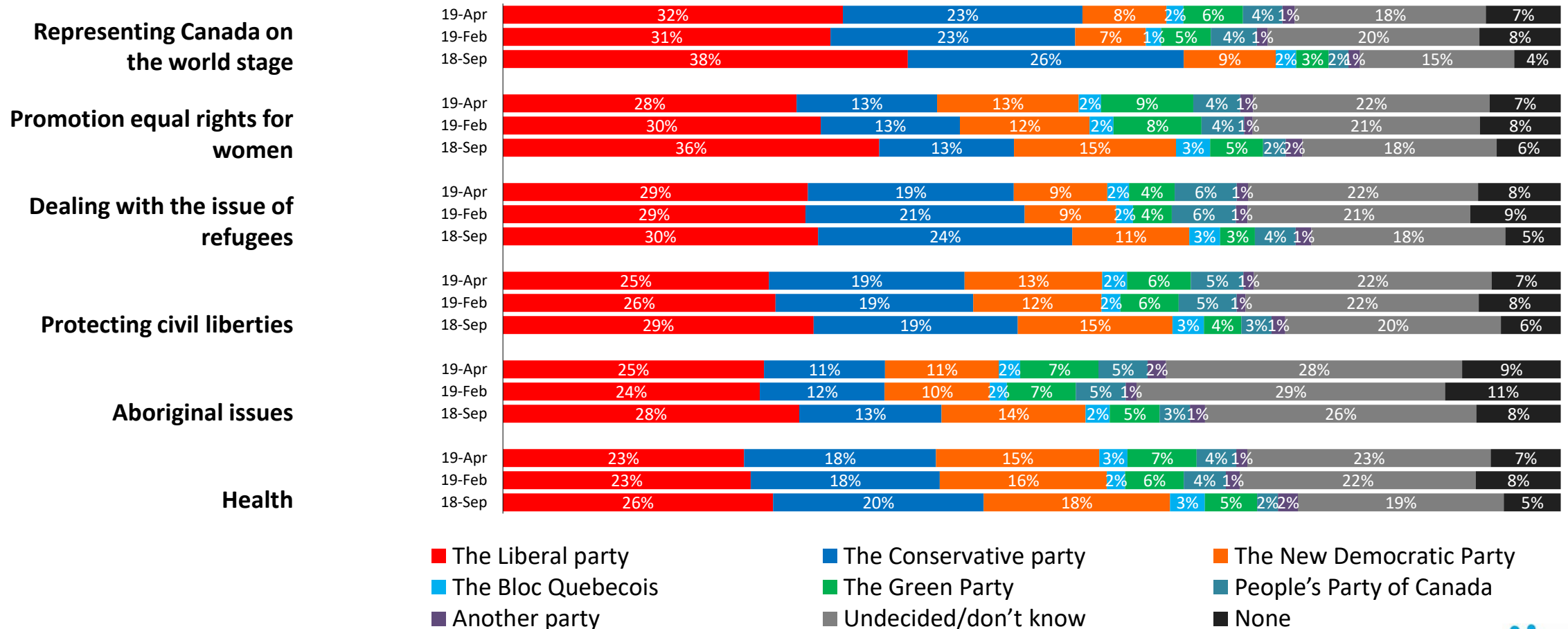
Note: Net impact is [Total more favourable]-[Total less favourable]

How much damage?

Party Attributes: Liberals are steady on attributes since February, down on most since September 2018



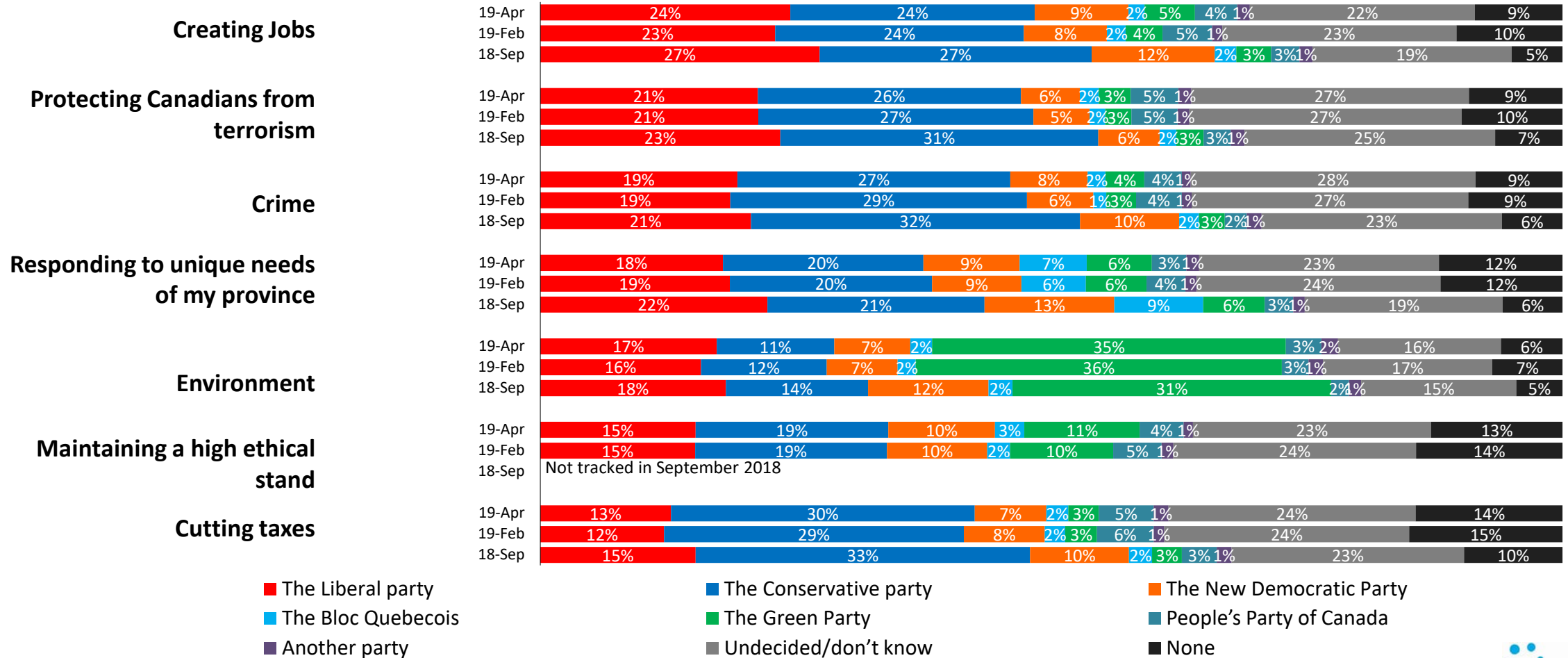
Now we are going to provide you with a list of issues. For each of these issues, please tell me which party you think would do a much better job or a somewhat better job of dealing with that issue, or if you think none of the parties would do a good job on that issue. How about ? [asked of all respondents; n=1,200]



Party Attributes: Liberals and Conservatives are tied as best party on “Creating Jobs” at 24% each



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 much better job or a somewhat better job of dealing with that issue, or if you think none of the parties would do a good job on that issue. How about ? [asked of all respondents; n=1,200]

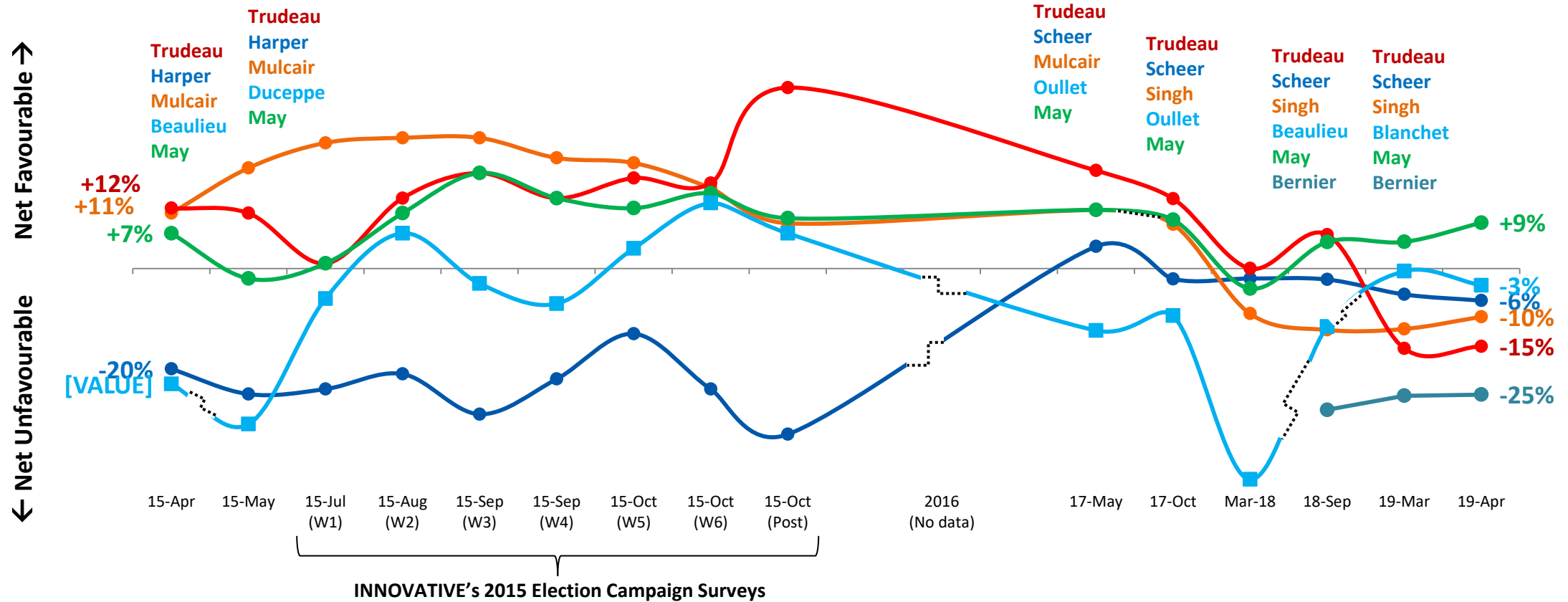


Net leader favourables: Leaders all stable since March; decline in Trudeau's favourability since September persists



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that. **Net favourables (% favourable - unfavourable) INCLUDES 'HAVE NOT HEARD' for tracking consistency.**

[asked of all respondents; n=1,200]



Legend: Conservative leader (dark blue circle), NDP Leader (orange circle), Liberal Leader (red circle), Green Leader (green circle), Bloc Leader (light blue square), People's Party Leader (teal circle)

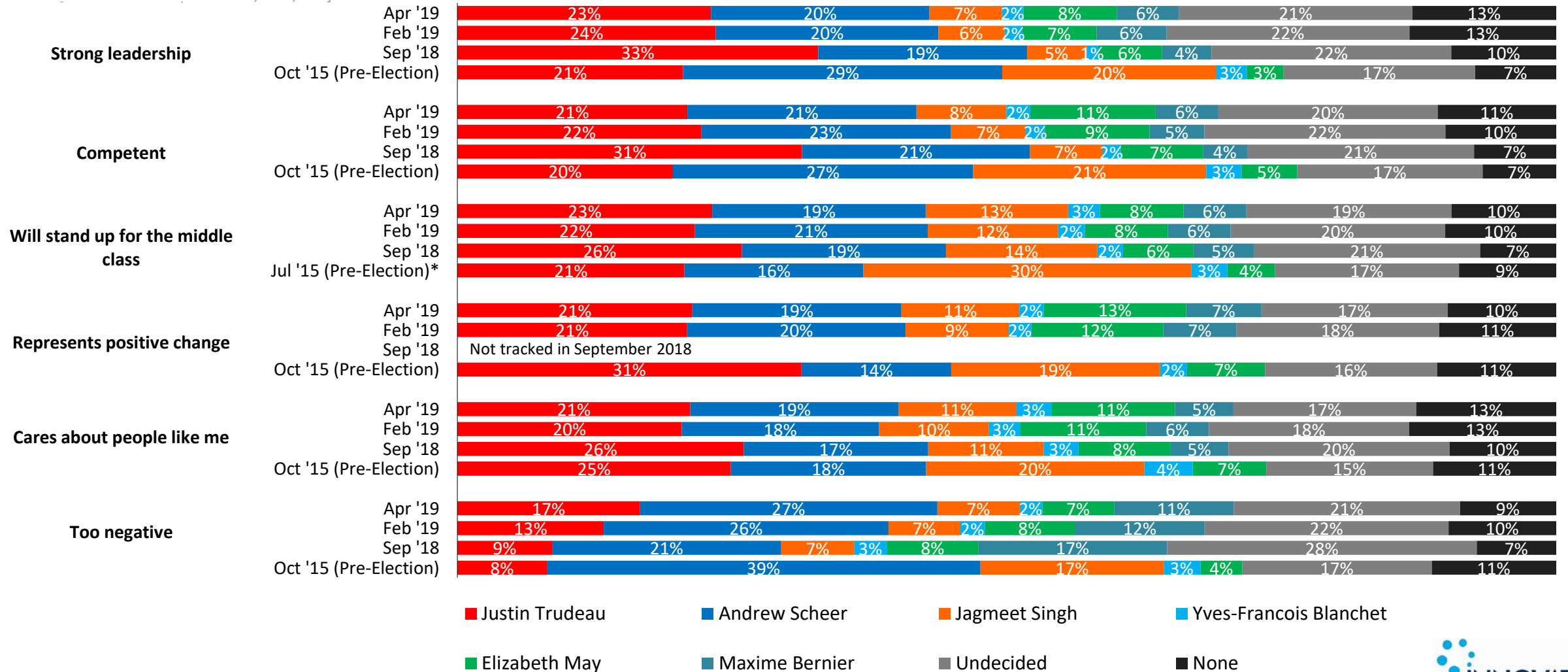
Note: BQ leaders asked in Quebec Only. ... indicates a change in party leader during tracking

Leader Qualities: Perceptions that Trudeau is too negative are up 8 points since September 2018 from 9% to 17%



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

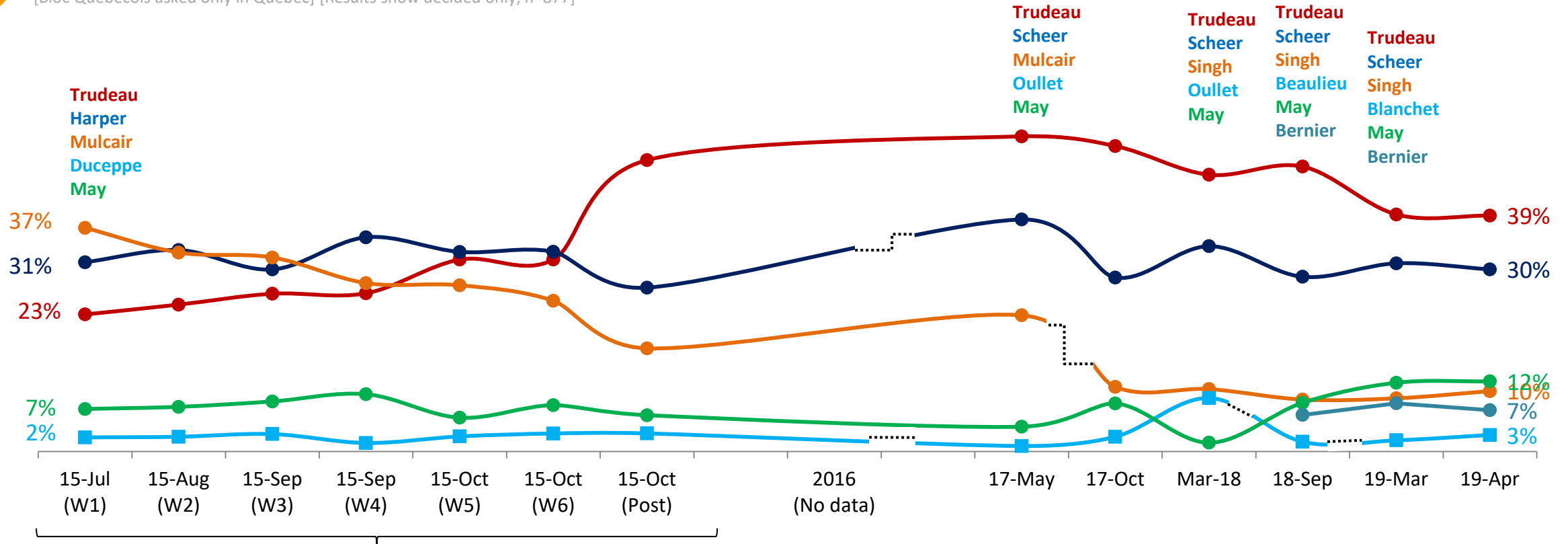
[asked of all respondents; n=1,200]



* The study of July 2015 was conducted before the writ was dropped in August 2015.

Best Prime Minister - Decided: Trudeau (39%) remains the top choice for best Prime Minister, with Scheer (30%) trailing by 9 points

Q Which of the following party leaders would make the best Prime Minister of Canada?
 [Bloc Quebecois asked only in Quebec] [Results show decided only, n=877]



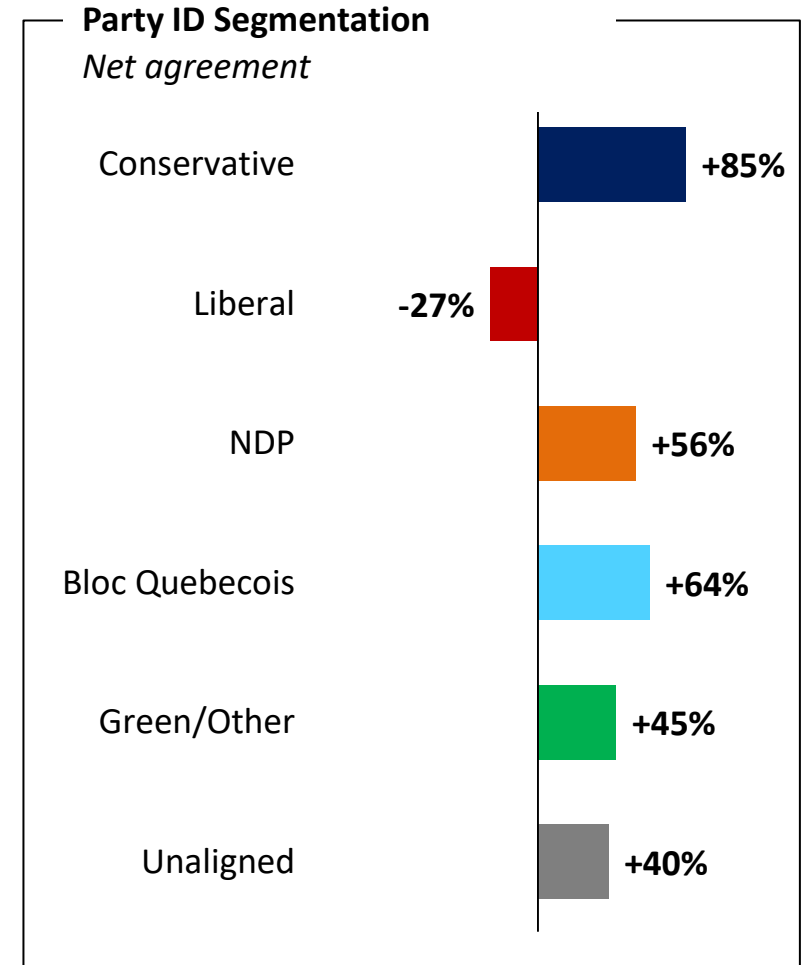
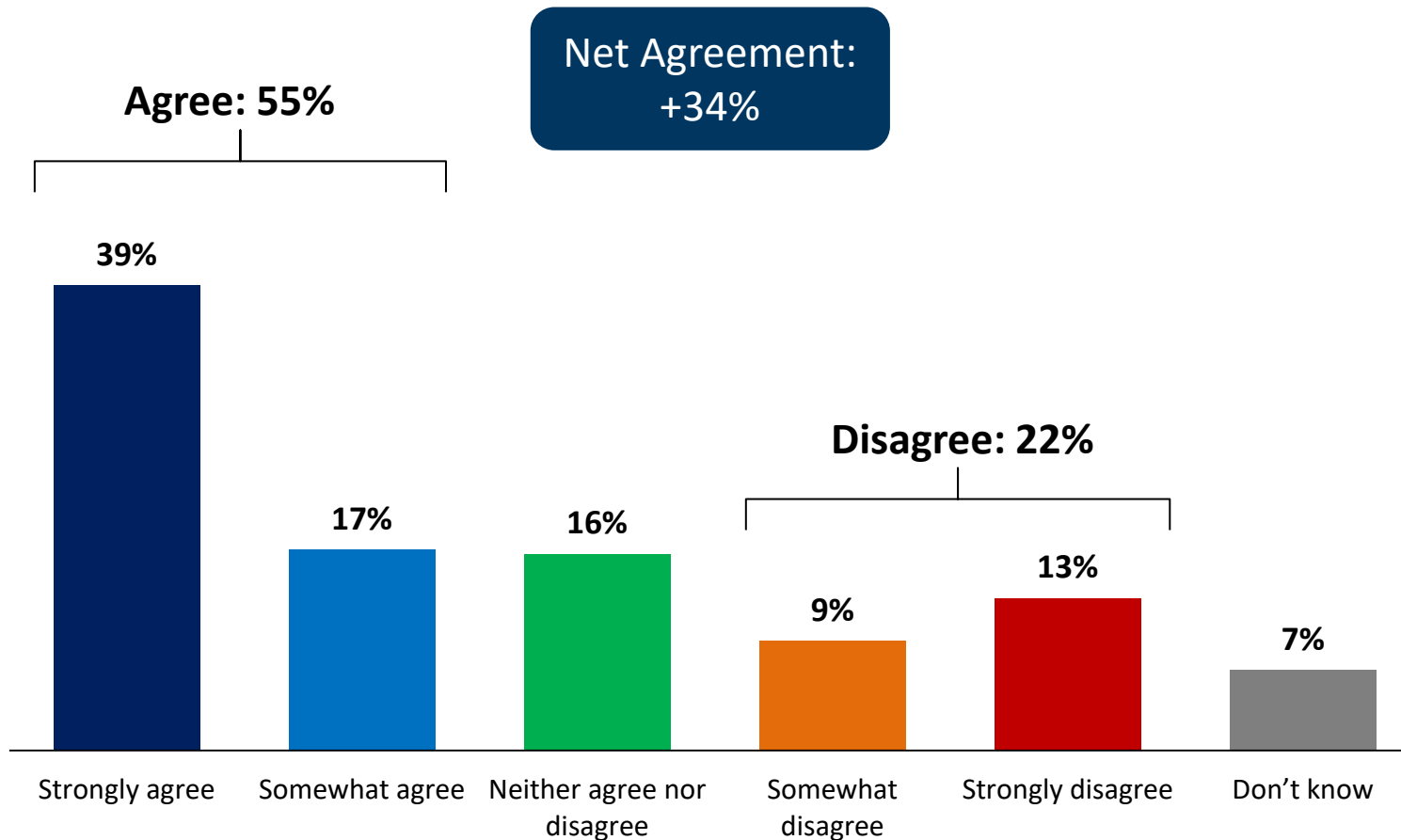
INNOVATIVE's 2015 Election Campaign Surveys

- Justin Trudeau of the Liberals
 - Andrew Scheer / Stephen Harper of the Conservatives
 - Jagmeet Singh / Thomas Mulcair of the NDP
 - Yves-Francois Blanchet / Mario Beaulieu / Martine Oullet / Gilles Duceppe of the Bloc Quebecois
 - Elizabeth May of the Green Party
 - Maxime Bernier of the People's Party
- : indicates a change in party leader during tracking

Note: 'None', 'Don't know', 'Refused' not included in calculations. Duceppe asked in QC only.

Agree or disagree: 55% think it's time for a change of government with above-average net agreement from Unaligned respondents

Q Do you agree or disagree with the following statements? It is time for a change in government here in Canada. [asked of all respondents; n=1,200]



Note: Net agreement is [Total agree]-[Total disagree]

So what now?

Perception of Carbon Pricing Policy: Slight plurality agree that pricing carbon is the best way to lower carbon use

Q

Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?

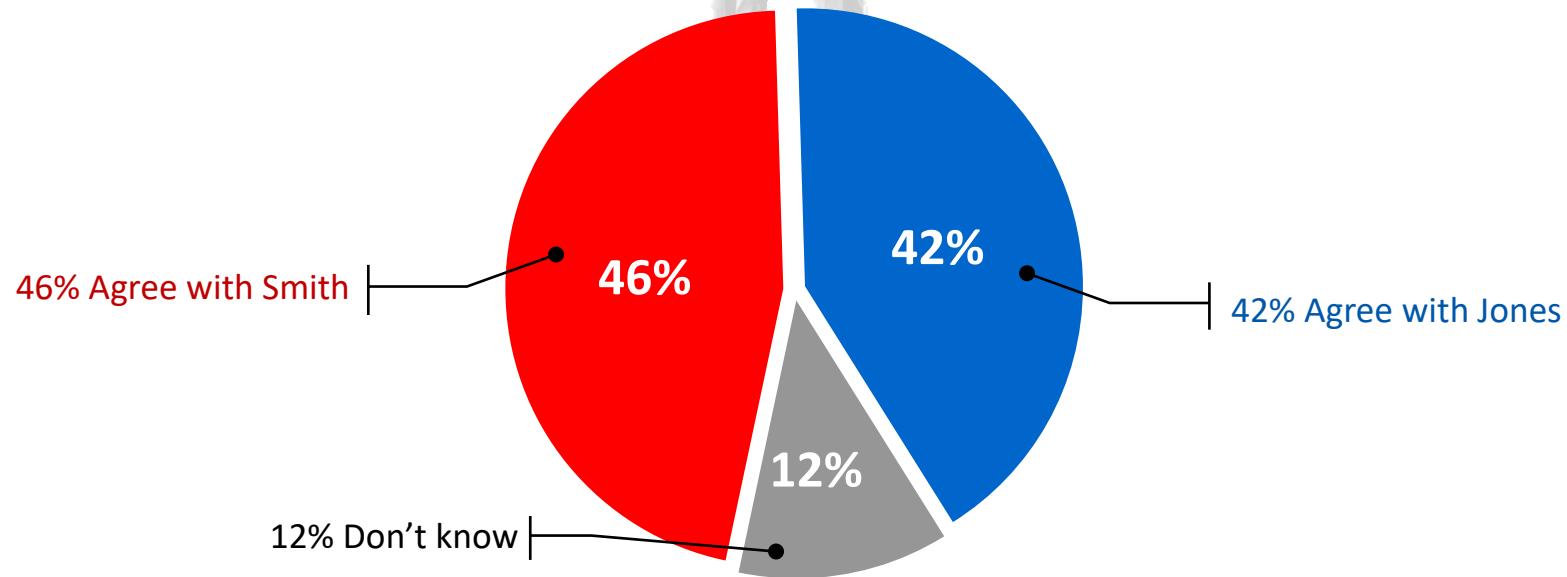
[asked of all December respondents; n=1,200]

Smith says:

Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country.

Jones says:

The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing for the environment.

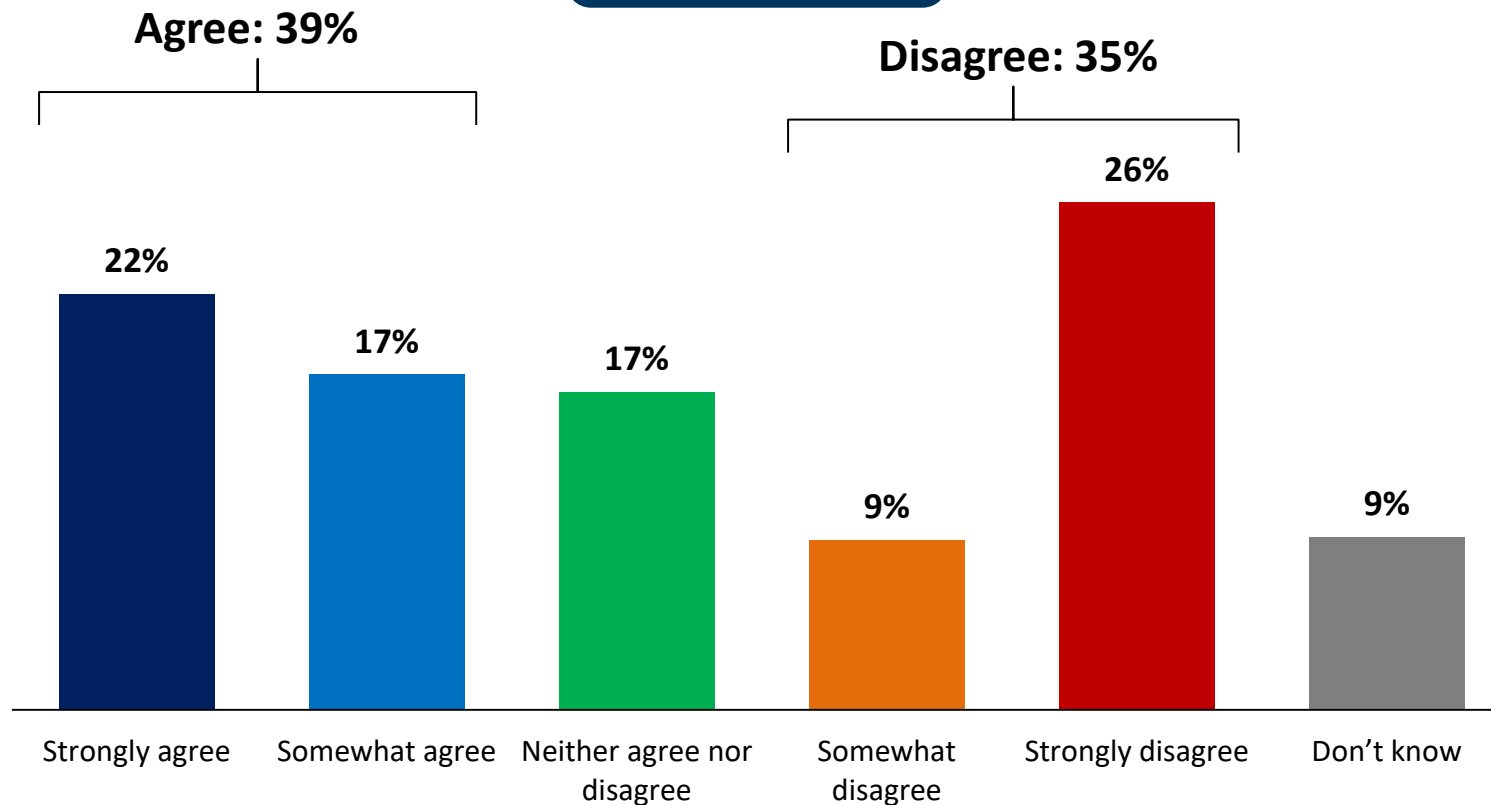


Agree or disagree: Respondents divided on whether or not the most important thing in this election is to keep CPC out

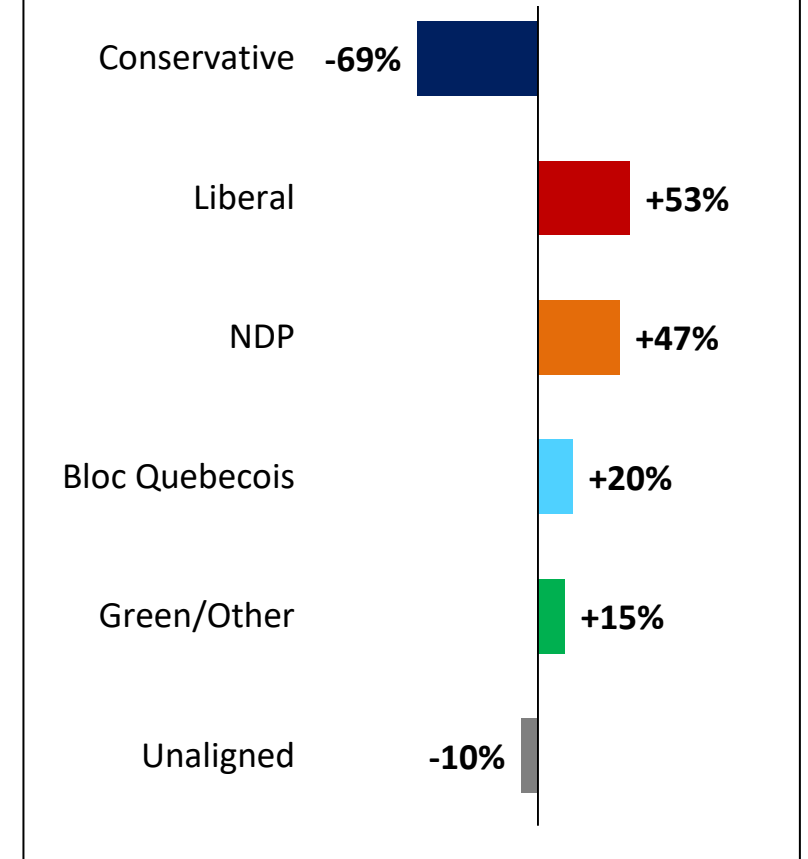


Do you agree or disagree with the following statements? The most important thing in this election is to keep the Conservatives out of government. [asked of all respondents; n=1,200]

Net Agreement:
+4%



Party ID Segmentation Net agreement



Note: Net agreement is [Total agree]-[Total disagree]

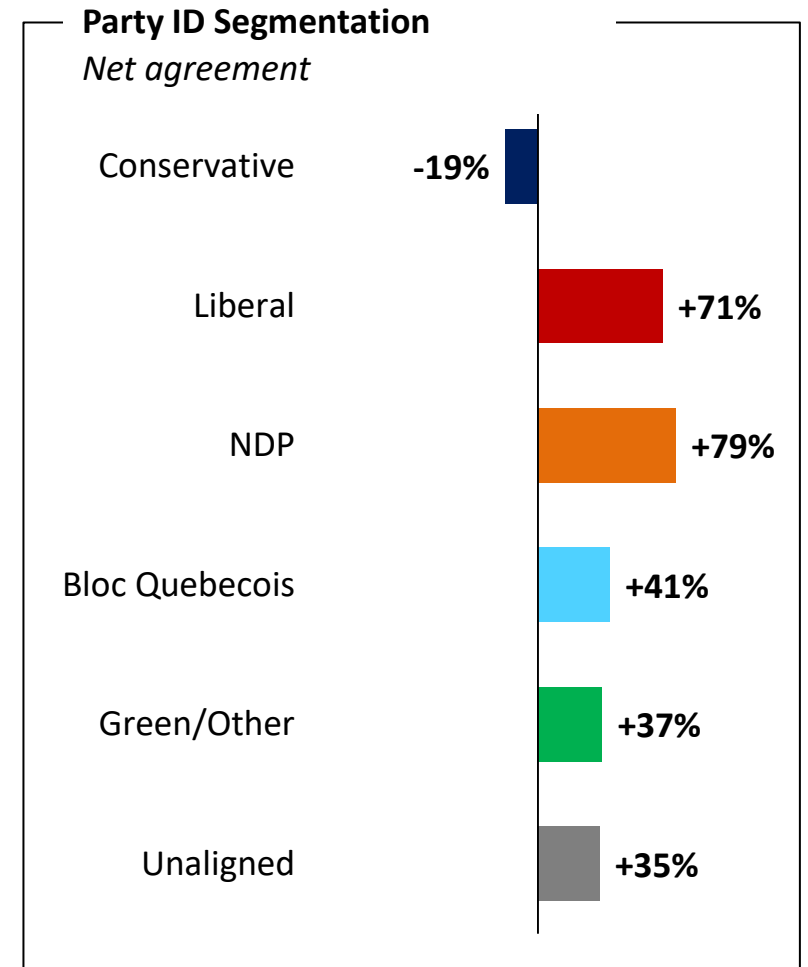
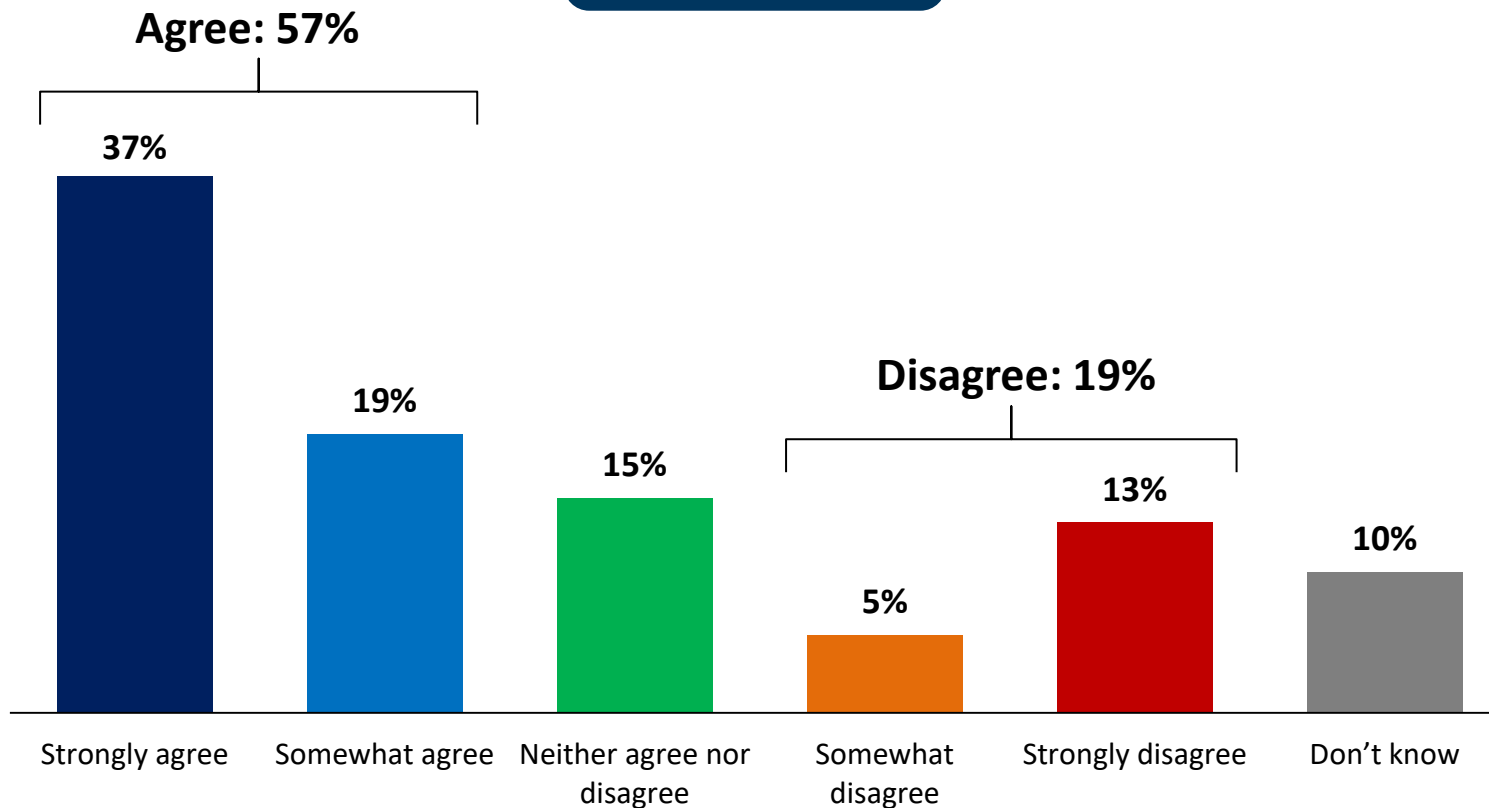
Agree or disagree: Nearly 6-in-10 (57%) feel the government needs to stand up to negative influence of politicians like Ford and Kenney



Do you agree or disagree with the following statements? We need a federal government that will stand up to the negative influence of provincial politicians like Doug Ford and Jason Kenney.

[asked of all respondents; n=1,200]

Net Agreement:
+38%



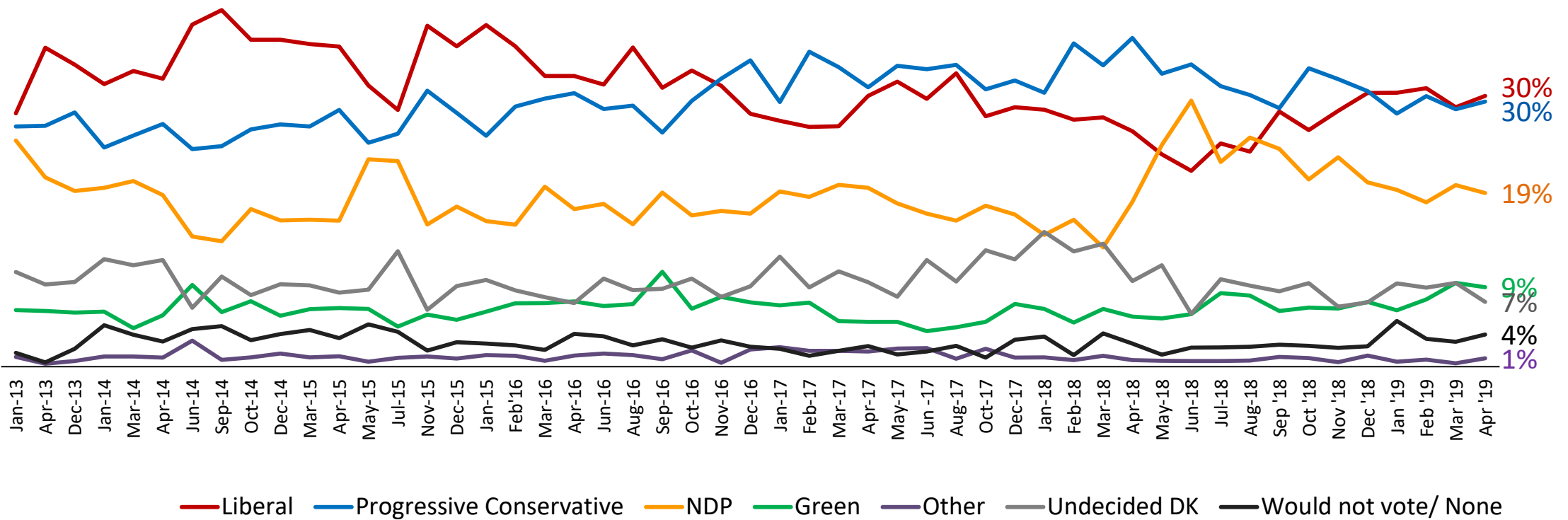
Note: Net agreement is [Total agree]-[Total disagree]

Ontario Politics

Combined Vote Tracking (ON): Liberals and Progressive Conservatives tied at 30%; NDP trail by more than ten points at 19%

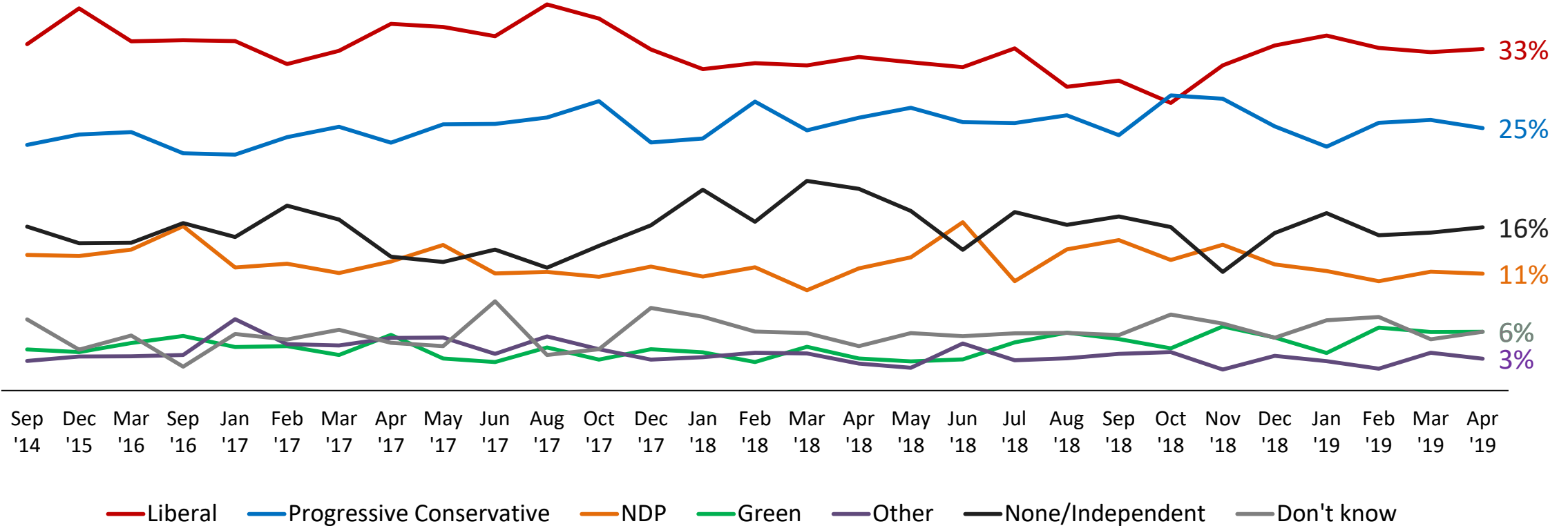


If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]
 [asked of all respondents in Ontario; n=600]



Provincial ID (ON): Liberal partisanship (33%) remains ahead of PC partisanship (25%); NDP trail at only 11%

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a...
 [asked of all respondents in Ontario; n=600]



Combined Vote by Party ID (ON): Progressive Conservative and NDP partisans are both more loyal than Liberal partisans ⁴⁸ both more loyal than Liberal partisans

Combined Vote by Party ID

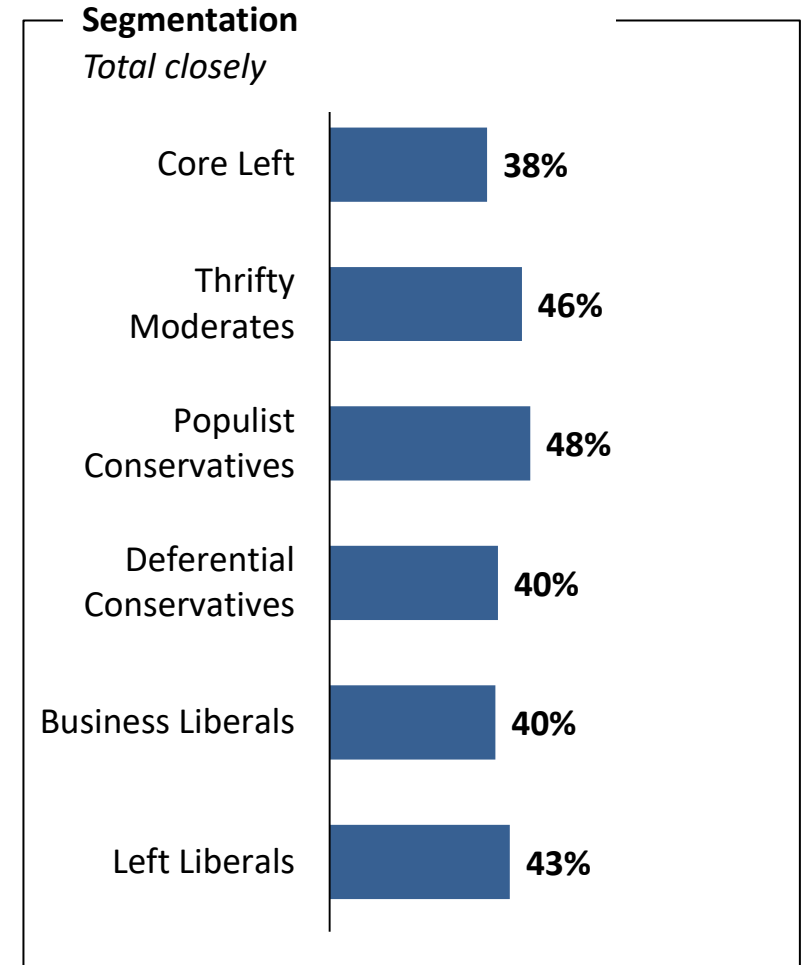
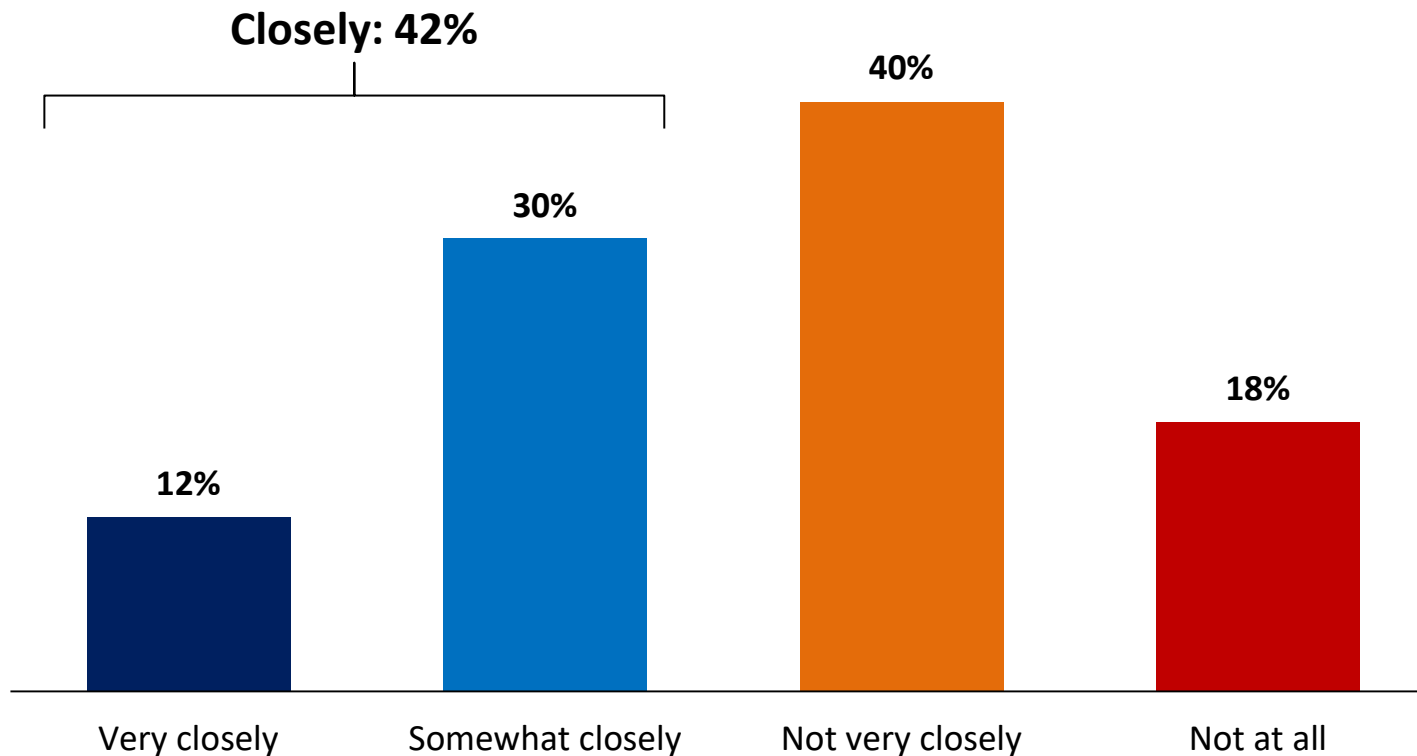
		Party ID				
		Liberal	Progressive Conservative	NDP	Green/Other	Unaligned
Combined Vote	Ontario Liberal	71%	5%	8%	12%	17%
	PC	6%	84%	4%	20%	19%
	NDP	13%	5%	80%	13%	17%
	Green	6%	3%	8%	45%	7%
	Other	0%	1%	0%	7%	0%
	Undecided/DK	3%	3%	0%	1%	24%
	Would not vote/None	0%	0%	0%	1%	16%

Attention: 42% say they have been following announcements about Ontario's electricity system at least somewhat closely



How closely have you been following recent announcements about changes to Ontario's electricity system? These changes include ending the previous administration's hydro plan, uploading local electricity conservation programs to the corporation that manages the system and overhauling the energy sector watchdog. Electricity rate increases will be held to inflation

[asked of all respondents in Ontario, n=600]

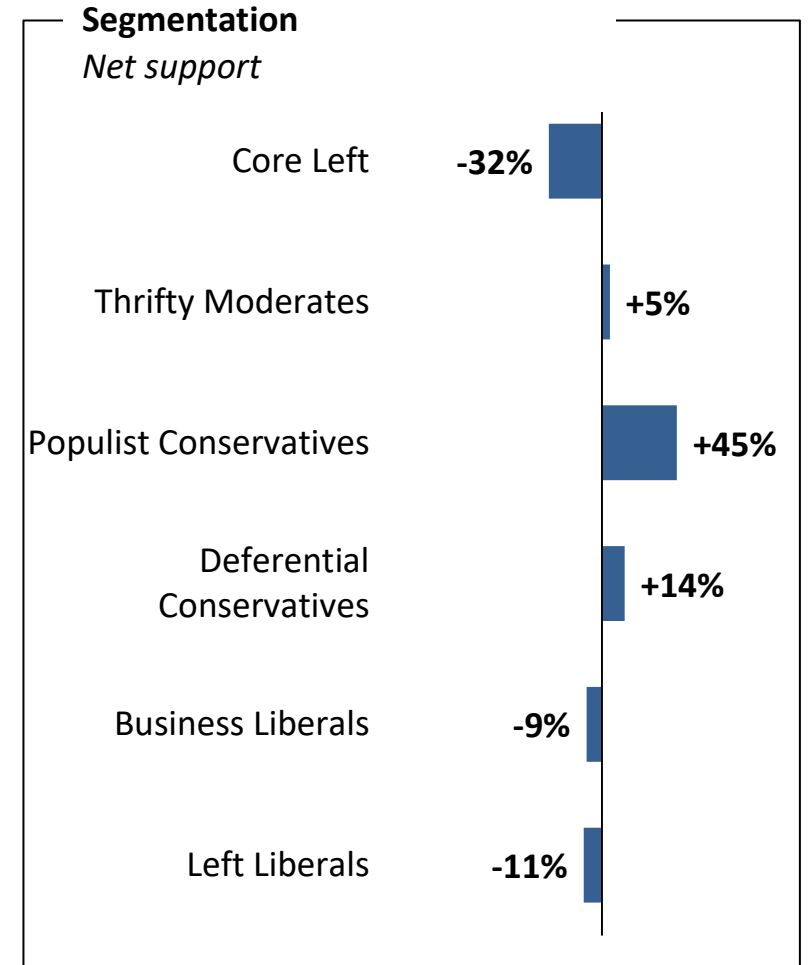
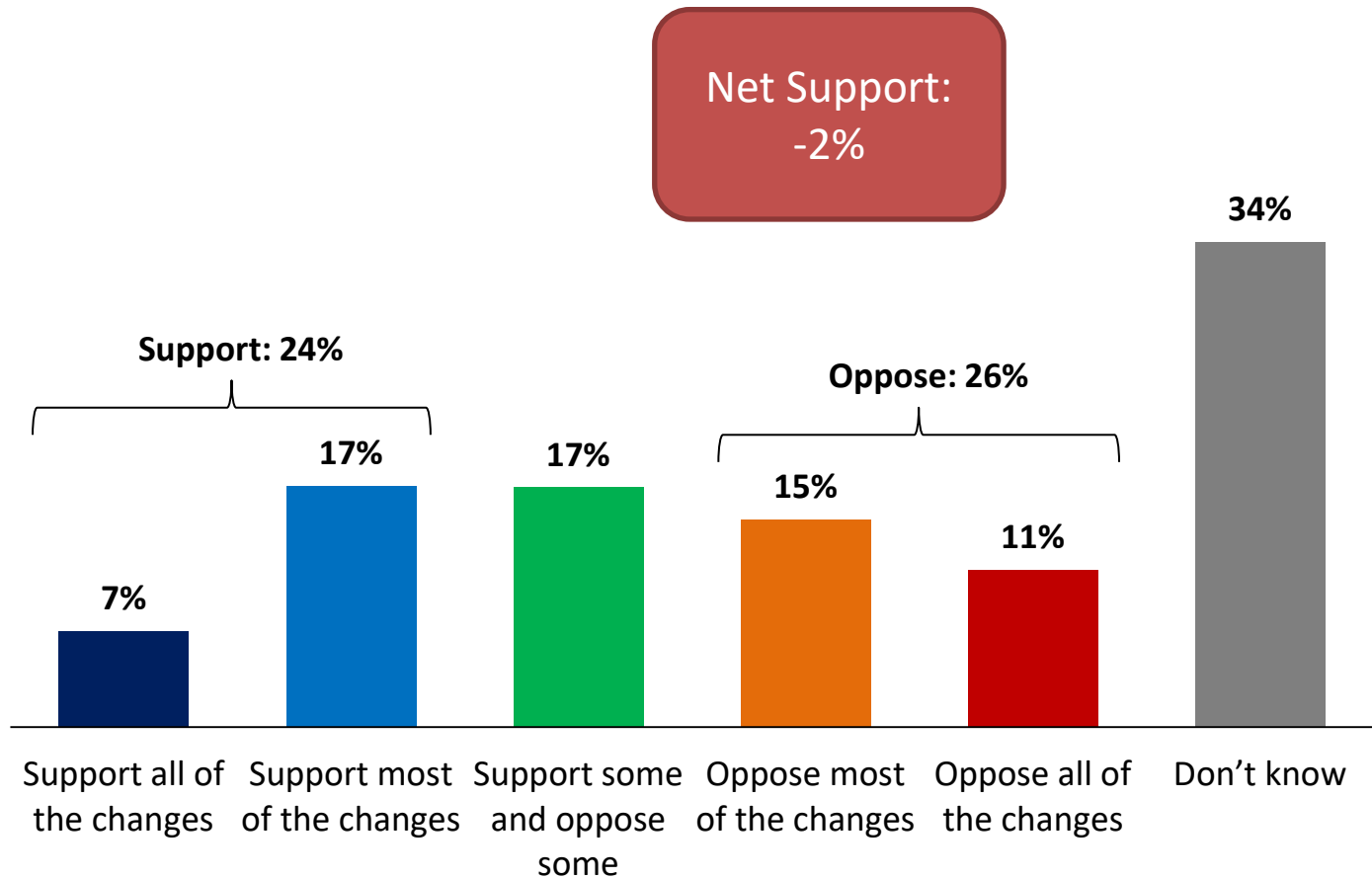


Support: Respondents are split on support, with 34% unsure; support lowest among the Core Left and highest among Populist Conservatives



From what you have heard so far, do you support or oppose the changes to the electricity system proposed by Doug Ford and the Progressive Conservative government of Ontario?

[asked of all respondents in Ontario, n=600]



Support by Awareness: Support is higher among those who are following the announcements at least somewhat closely



From what you have heard so far, do you support or oppose the changes to the electricity system proposed by Doug Ford and the Progressive Conservative government of Ontario? BY Awareness

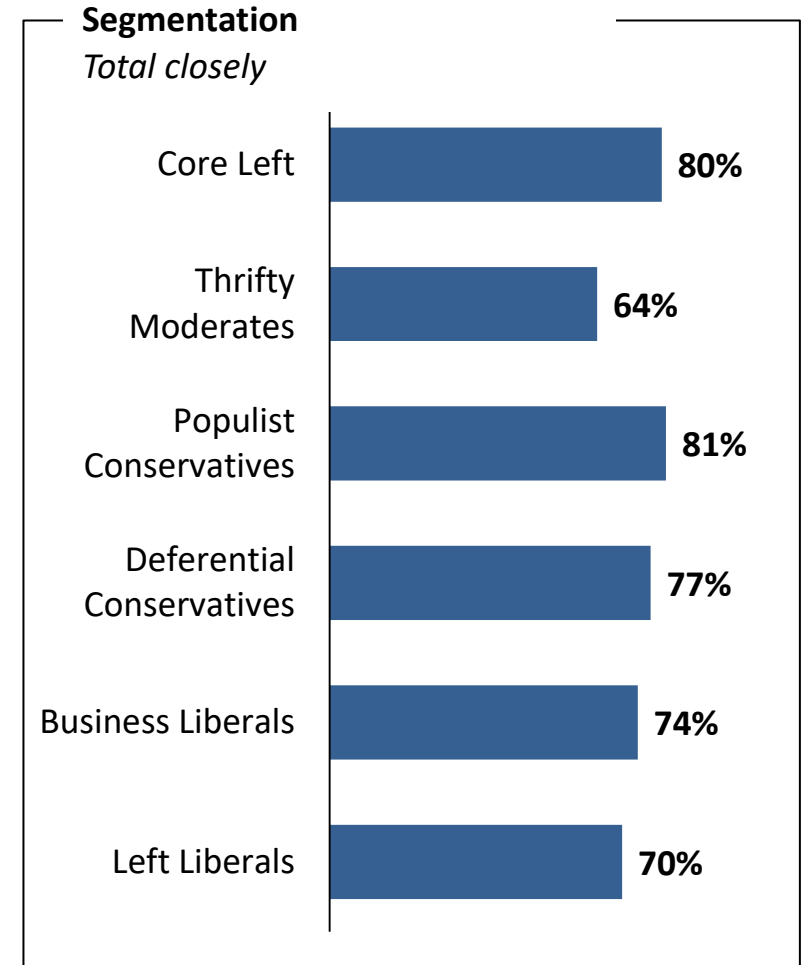
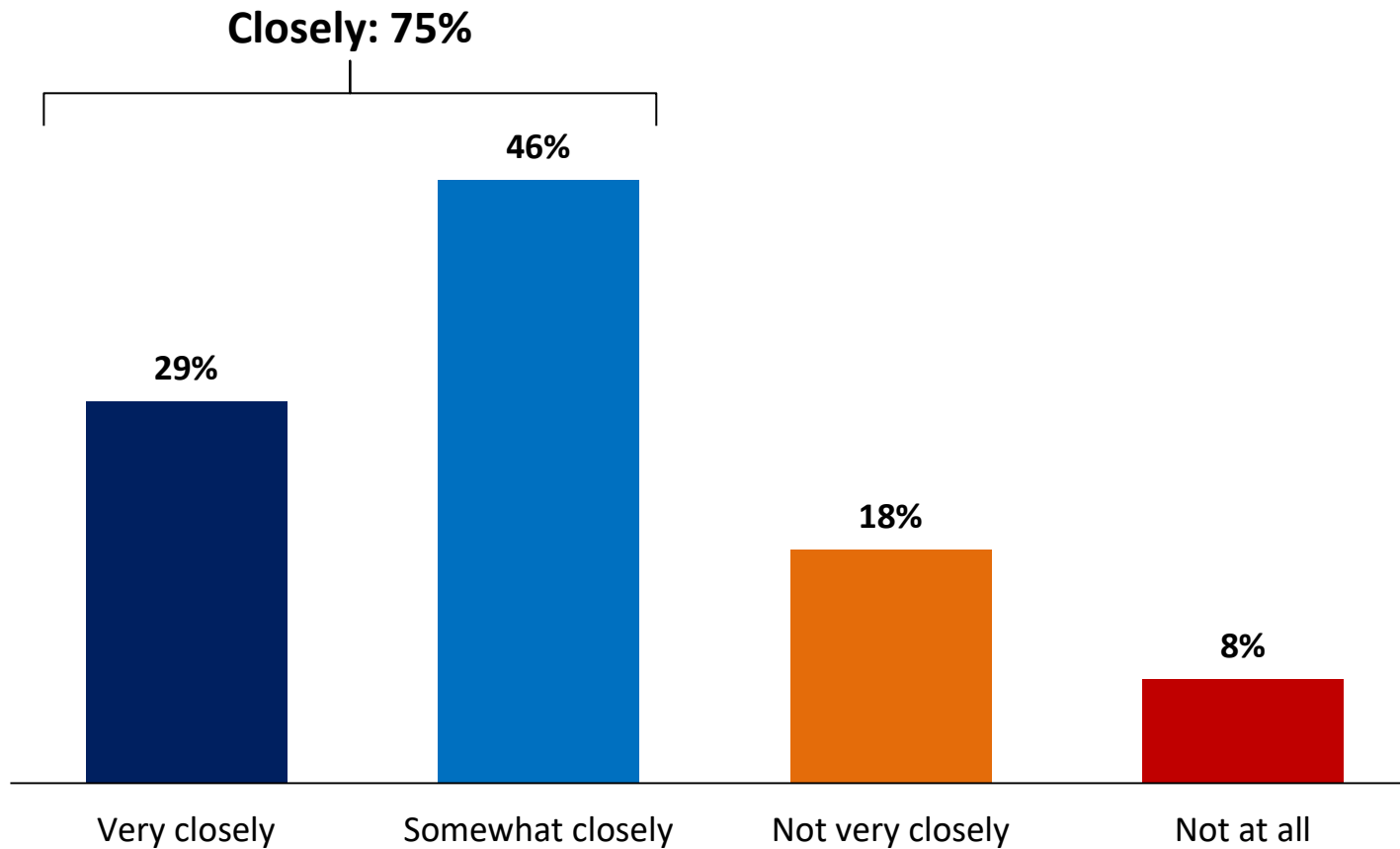
Impact	Awareness			
	Very closely	Somewhat closely	Not very closely	Not at all
Support all of the changes	29%	7%	2%	1%
Support most of the changes	17%	31%	13%	2%
Support some and oppose some	11%	29%	15%	3%
Oppose most of the changes	12%	15%	20%	4%
Oppose all of the changes	22%	10%	10%	7%
Don't know	9%	8%	40%	82%
NET	+12%	+13%	-15%	-8%

Attention: Three quarters (75%) of respondents say they are following the announcements at least somewhat closely



How closely have you been following recent announcements about changes to the education system in Ontario that would raise the cap on class sizes in high school, new elementary curricula for math and sex ed, and a ban on cell phones in the classroom?

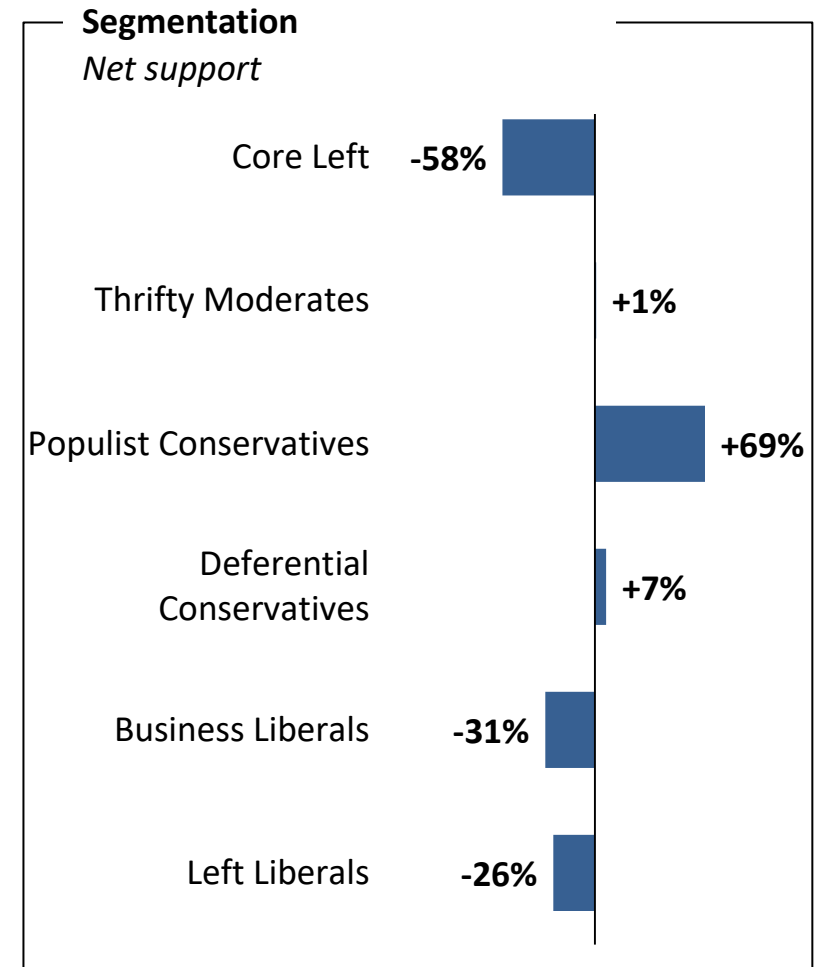
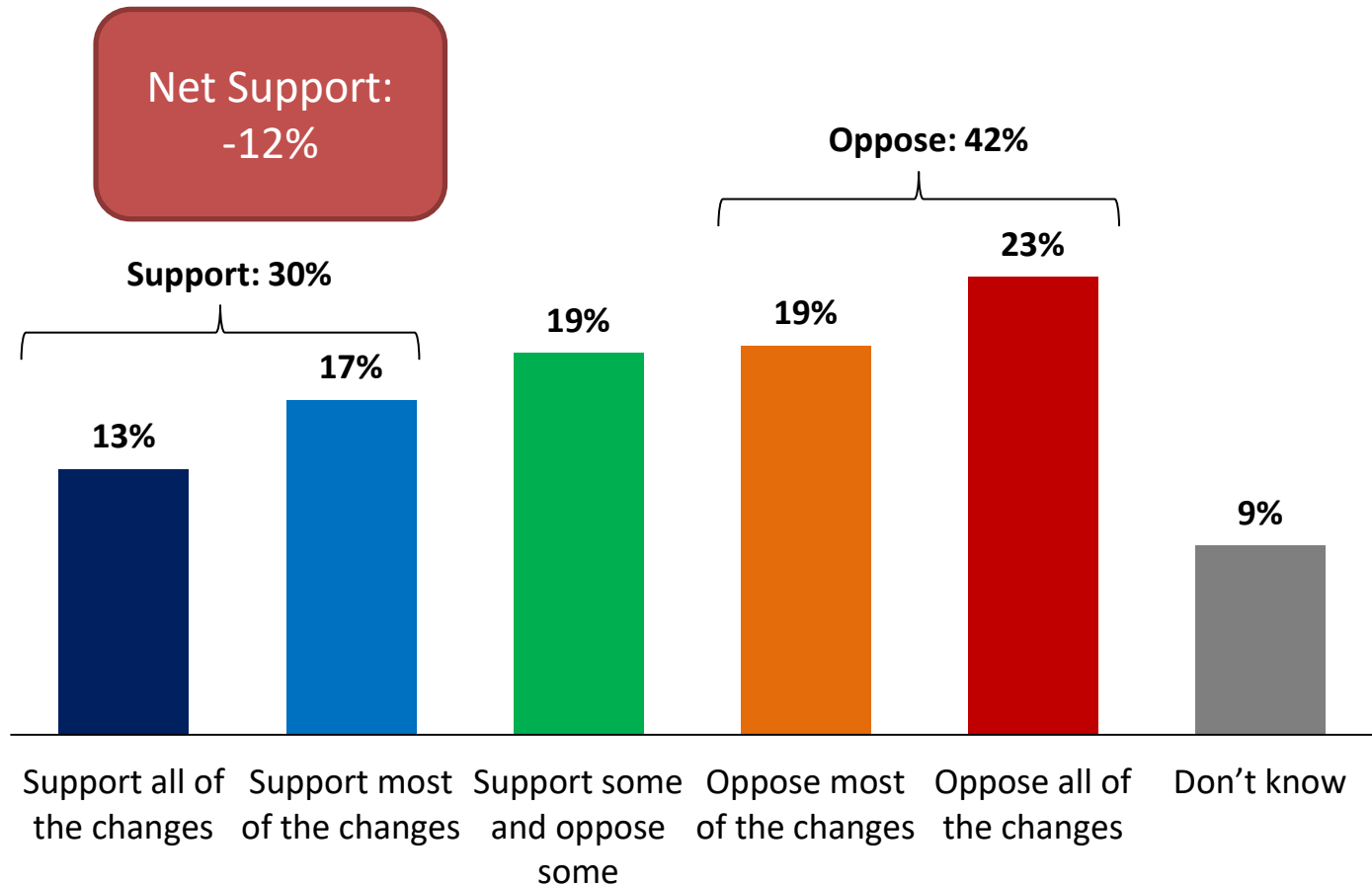
[asked of all respondents in Ontario, n=600]



Support: Overall net support is slightly negative (-12%); lowest among the Core Left (-58%)



From what you have heard so far, do you support or oppose the changes to the education system proposed by Doug Ford and the Progressive Conservative government of Ontario?
[asked of all respondents in Ontario, n=600]



Support by Awareness: Net support is lowest among those who are following the issue “very closely” (-27%)



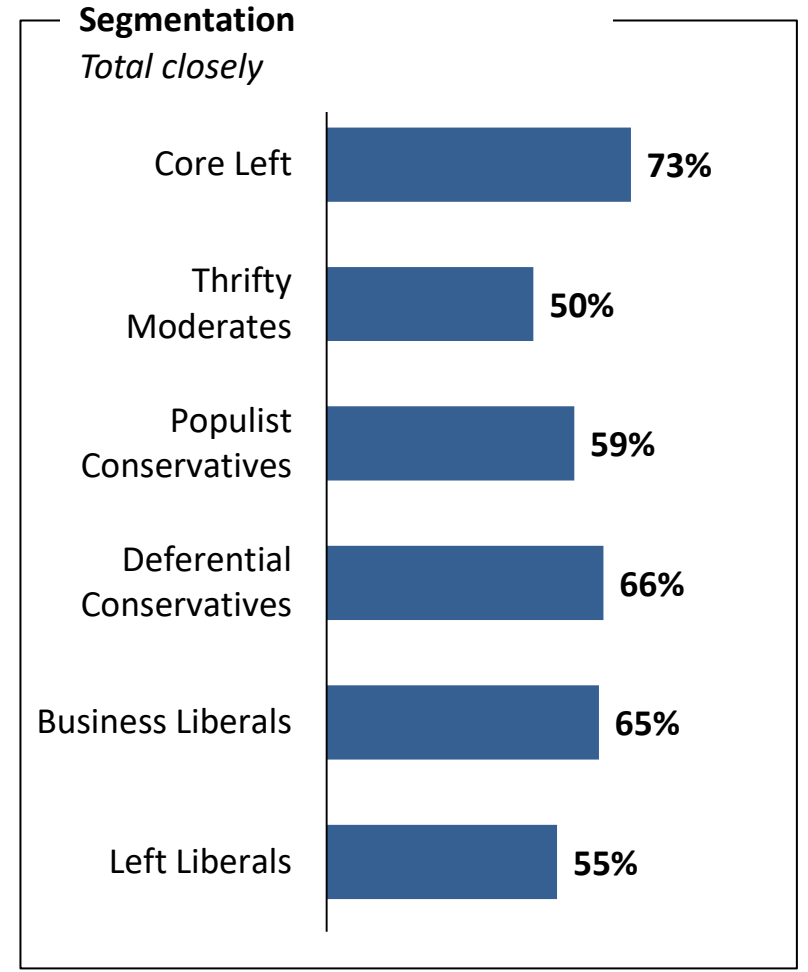
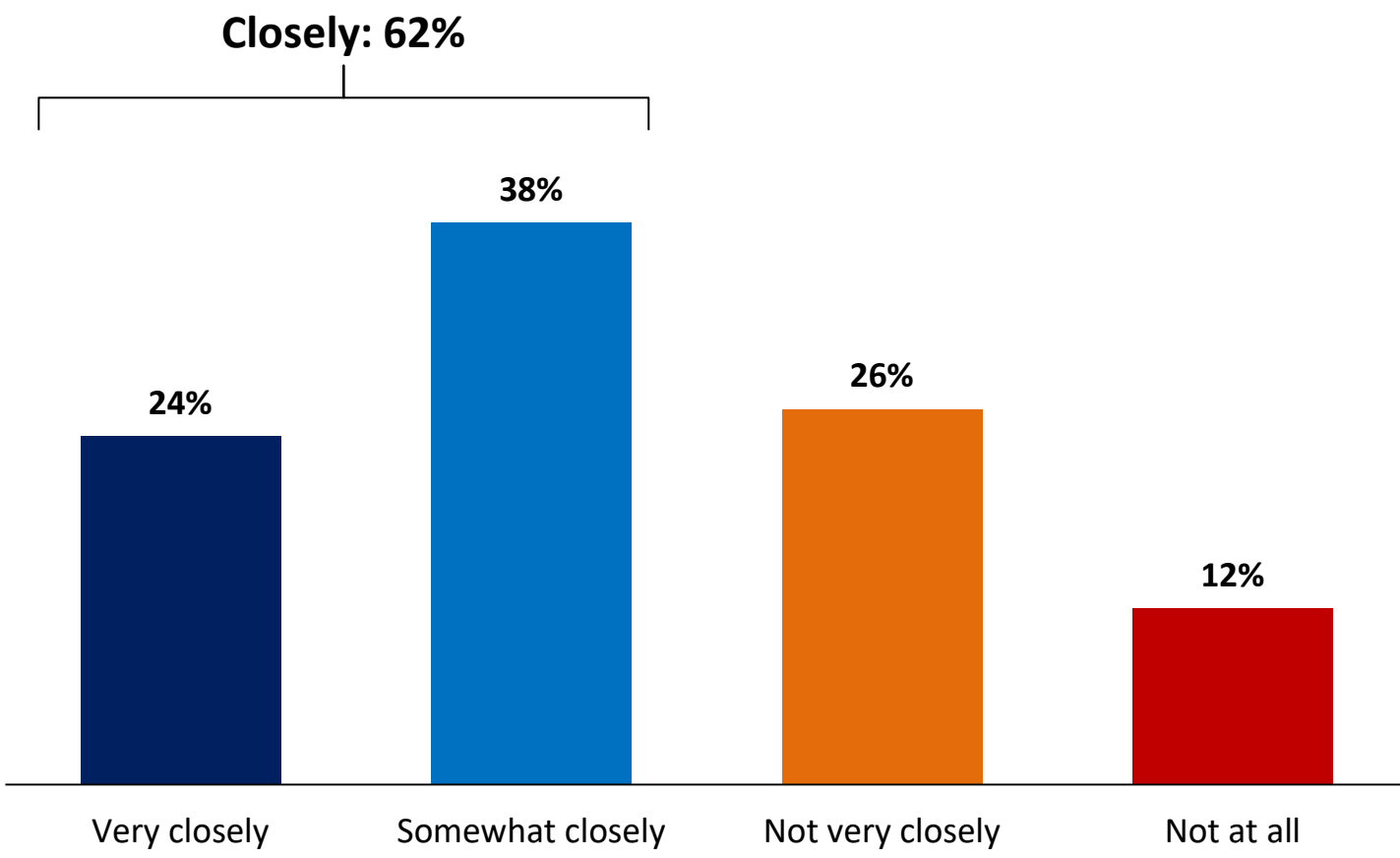
From what you have heard so far, do you support or oppose the changes to the education system proposed by Doug Ford and the Progressive Conservative government of Ontario? BY Awareness

Impact	Awareness			
	Very closely	Somewhat closely	Not very closely	Not at all
Support all of the changes	21%	12%	8%	1%
Support most of the changes	10%	23%	15%	7%
Support some and oppose some	9%	24%	26%	7%
Oppose most of the changes	18%	20%	27%	3%
Oppose all of the changes	40%	18%	12%	10%
Don't know	1%	2%	13%	73%
NET	-27%	-2%	-16%	-5%

Attention: Nearly two-thirds (62%) of respondents are following at least somewhat closely; highest among the Core Left (73%)



How closely have you been following recent announcements about the new autism support program in Ontario?
[asked of all respondents in Ontario, n=600]

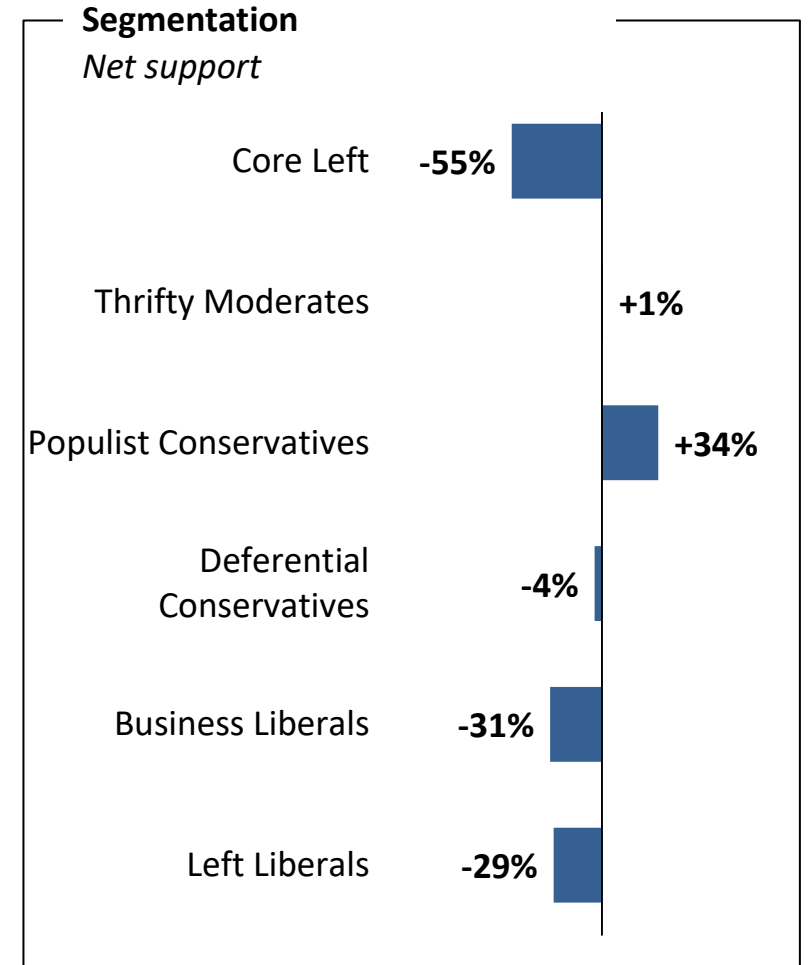
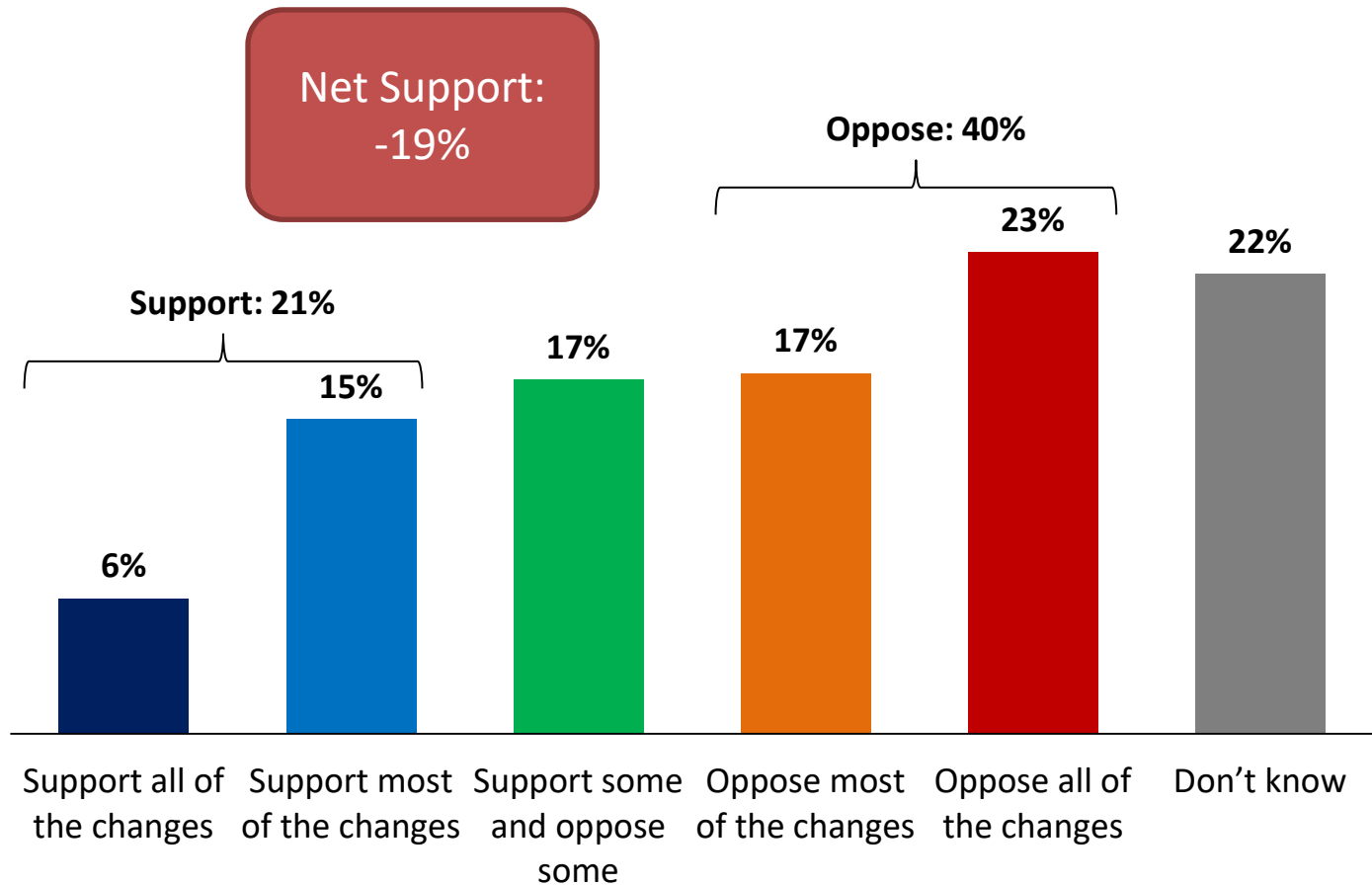


Support: One-in-four (23%) respondents oppose all the changes to the autism support program



From what you have heard so far, do you support or oppose the changes to the autism support program proposed by Doug Ford and the Progressive Conservative government of Ontario?

[asked of all respondents in Ontario, n=600]



Support by Awareness: Nearly half (45%) of those following very closely⁵⁷ say they oppose all the changes to the support program



From what you have heard so far, do you support or oppose the changes to the autism support program proposed by Doug Ford and the Progressive Conservative government of Ontario? BY Awareness

Impact	Awareness			
	Very closely	Somewhat closely	Not very closely	Not at all
Support all of the changes	17%	4%	2%	2%
Support most of the changes	11%	22%	12%	7%
Support some and oppose some	7%	24%	21%	3%
Oppose most of the changes	19%	19%	19%	4%
Oppose all of the changes	45%	24%	8%	6%
Don't know	2%	6%	38%	78%
NET	-37%	-17%	-13%	-1%



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