Council for Clean and Reliable Energy

October 26th, 2023 Leaders Roundtable

INNOVATIVE RESEARCH GROUP

What Change is Needed to Get the Energy Transition Done?

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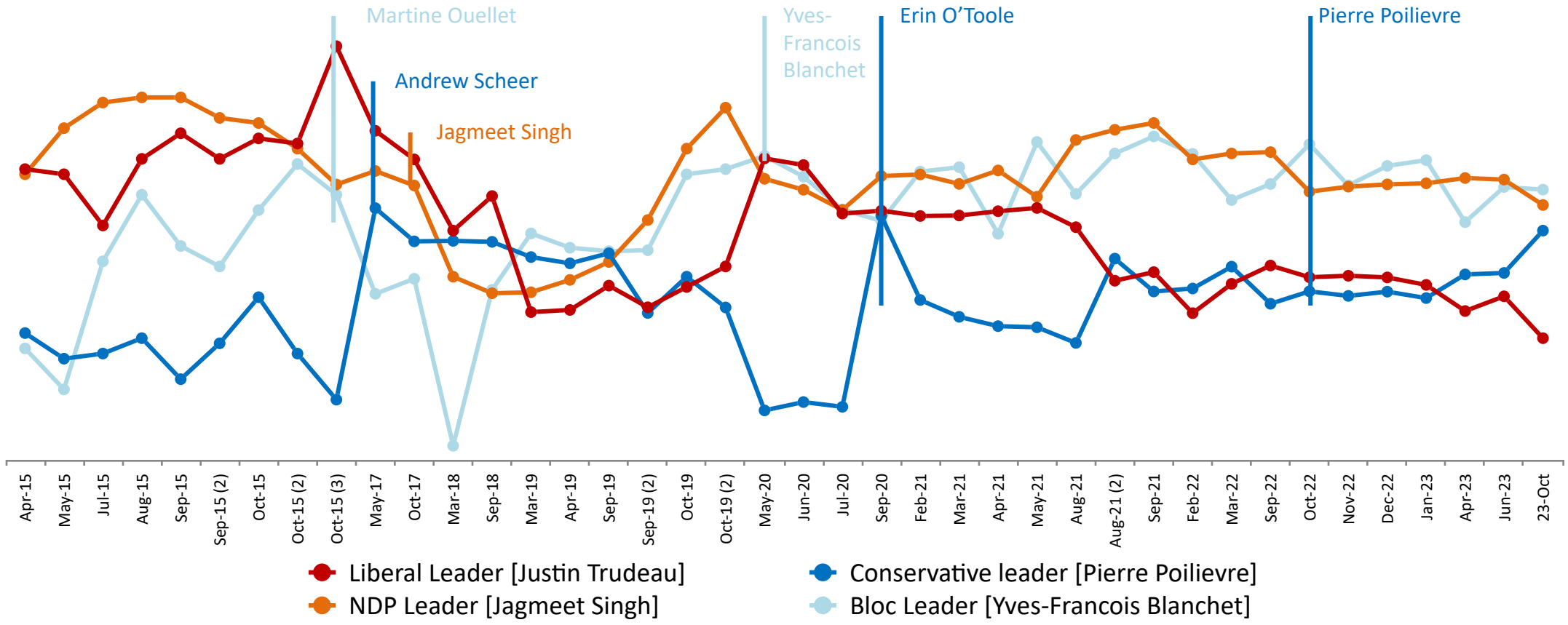
Federal Political Trends

Party Leader NET Favourables Tracking: NDP have the highest leader net favourability; Trudeau now lowest net favourability, falling beneath Poilievre

Q 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.

[asked of all respondents; n=3,500]



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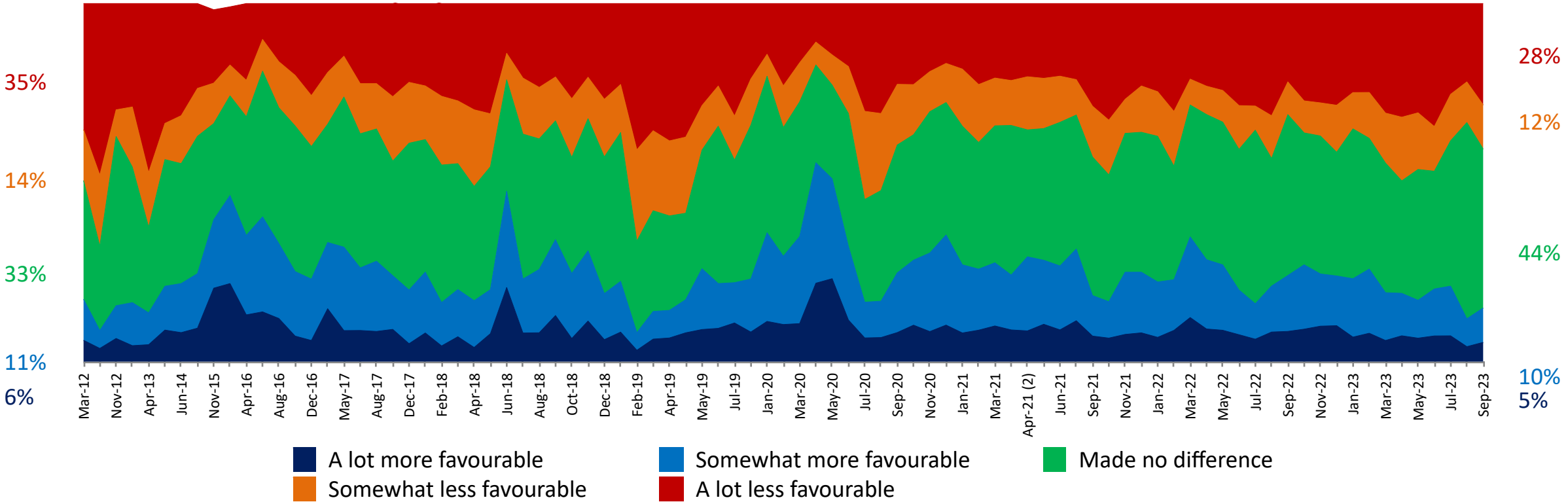
Federal Read, Seen Heard Tracking: Winds of public debate more negative than positive, but not overwhelming so

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 Canada's Prime Minister and the Federal government?

[only asked of those who have RSH; n=392]



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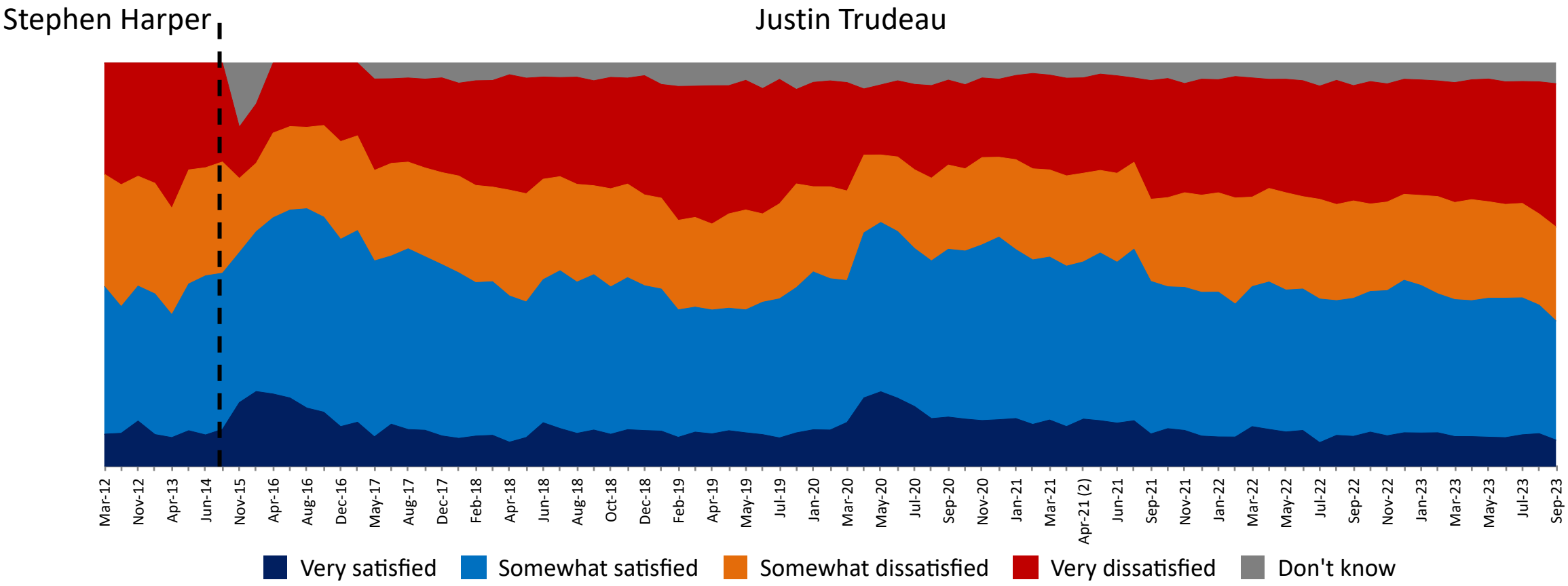

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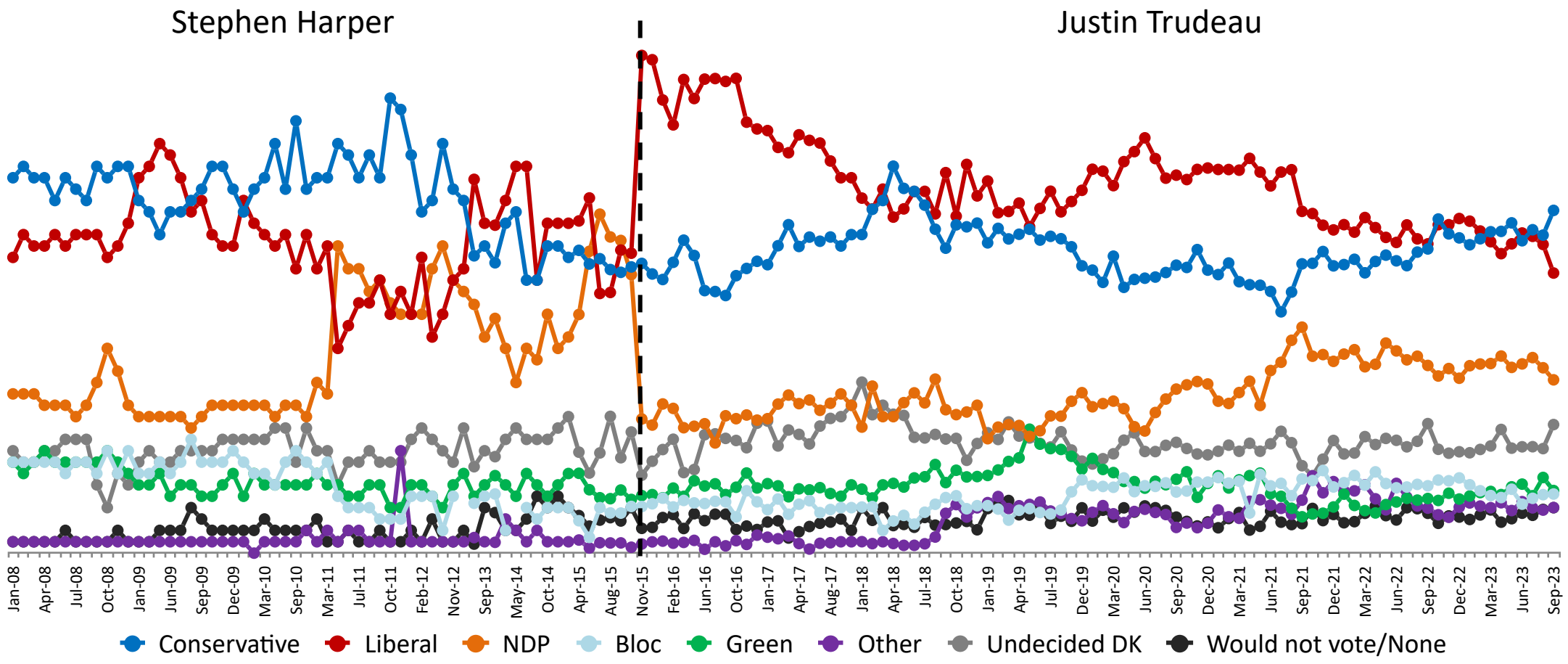

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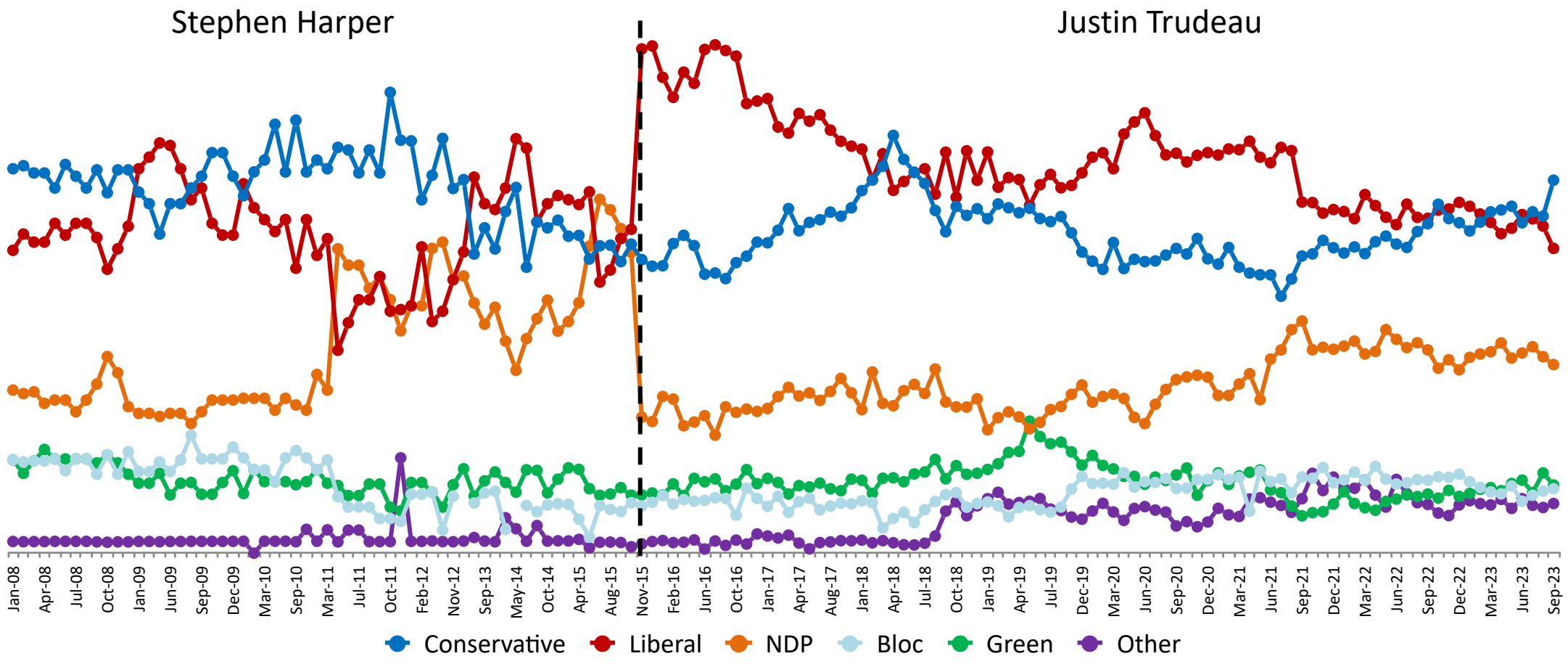

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	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
	(N=289)	(N=232)	(N=550)	(N=440)	(N=462)	(N=527)
Conservative	62%	36%	32%	27%	14%	25%
Liberal	15%	25%	32%	24%	26%	21%
NDP	5%	8%	10%	18%	29%	14%
Bloc	4%	8%	7%	4%	5%	4%
Green	2%	6%	5%	6%	7%	7%
Other	5%	4%	4%	3%	3%	5%
Undecided DK	7%	10%	9%	13%	10%	16%
Would not vote/ None	1%	2%	2%	3%	6%	9%

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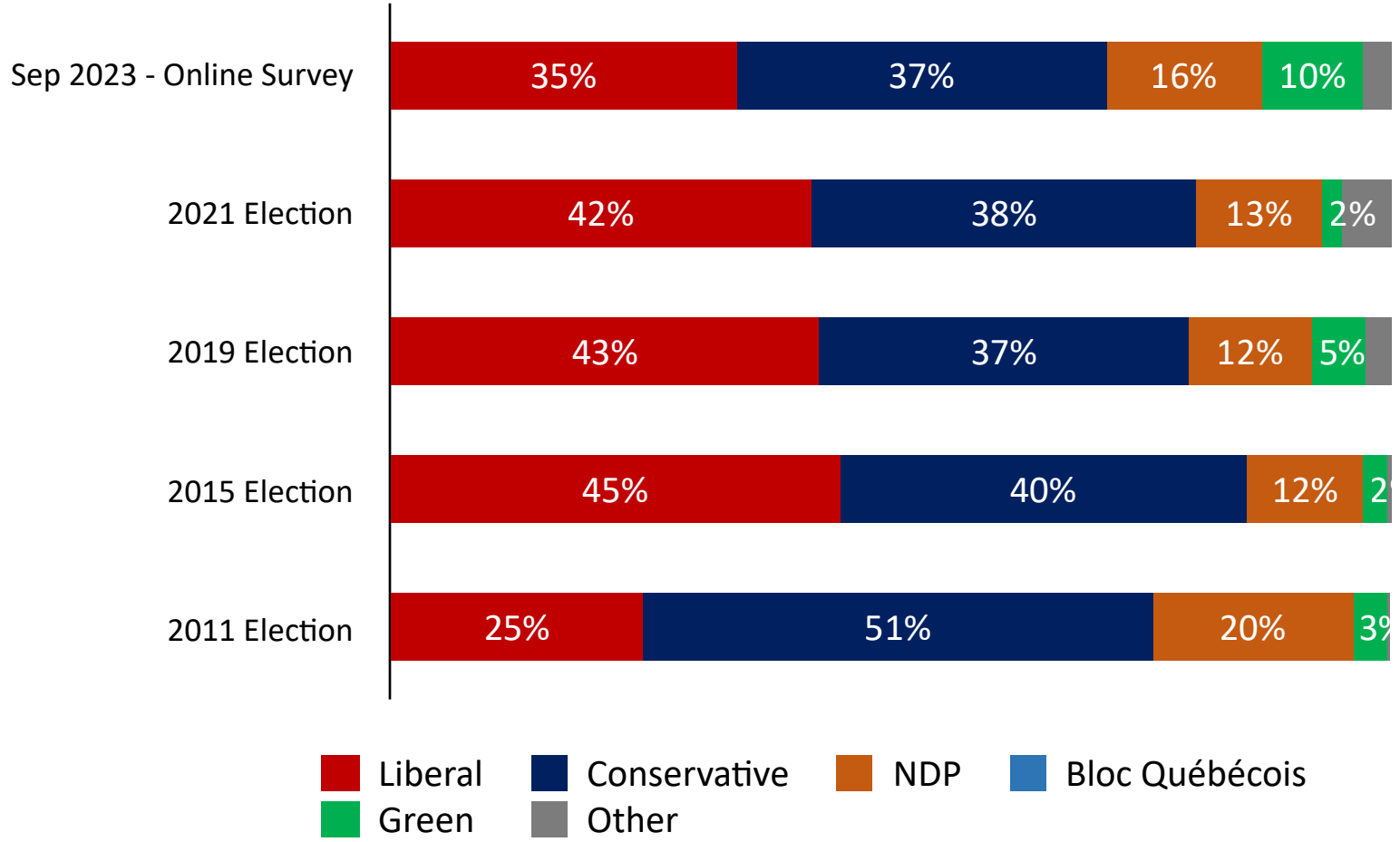
Counting Seats

CPC-LPC Swing (Ontario): Though still very close, for the first time since 2011 CPC has a slight 2-point lead over the Liberals

Decided Vote from September 2023 online survey compared to actual election results between 2011 and 2021



Seats in Ontario that have consistently been close – or flipped back and forth – between the Liberals and the Conservatives.

Party	Seats Won 2021	Seats Won 2019	Seats Won 2015	Seats Won 2011*
Liberal	22	23	25	0
CPC	8	7	5	29
NDP	0	0	0	1

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

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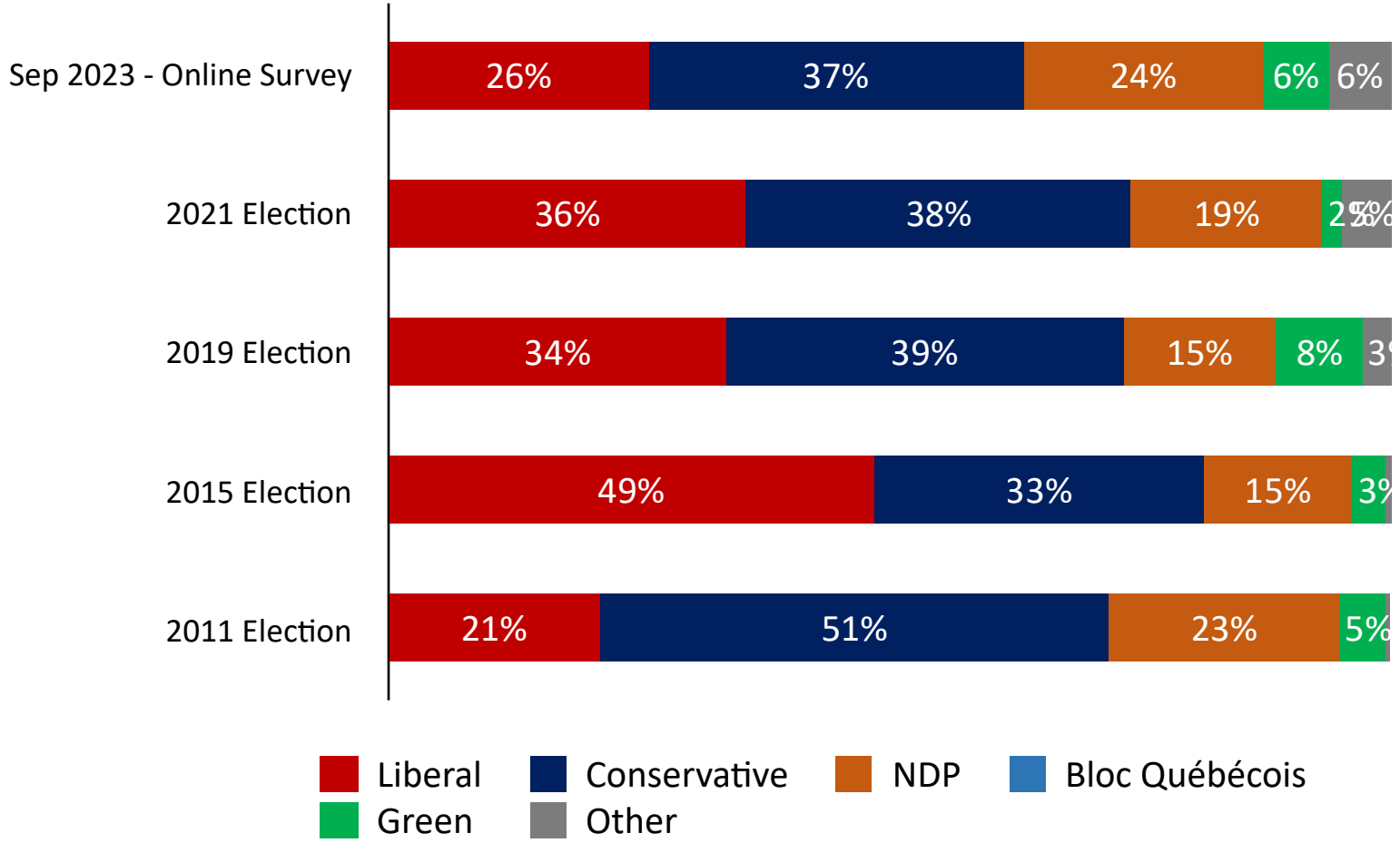
CPC-LPC Swing (Non-Ontario): While the CPC remains steady, the NDP continues to see steady increases while the Liberals decrease

Decided Vote from September 2023 online survey compared to actual election results between 2011 and 2021



Seats outside of Ontario that have consistently been close – or flipped back and forth – between the Liberals and the Conservatives.

Party	Seats Won 2021	Seats Won 2019	Seats Won 2015	Seats Won 2011*
Liberal	16	14	30	3
CPC	15	17	1	28
NDP	0	0	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

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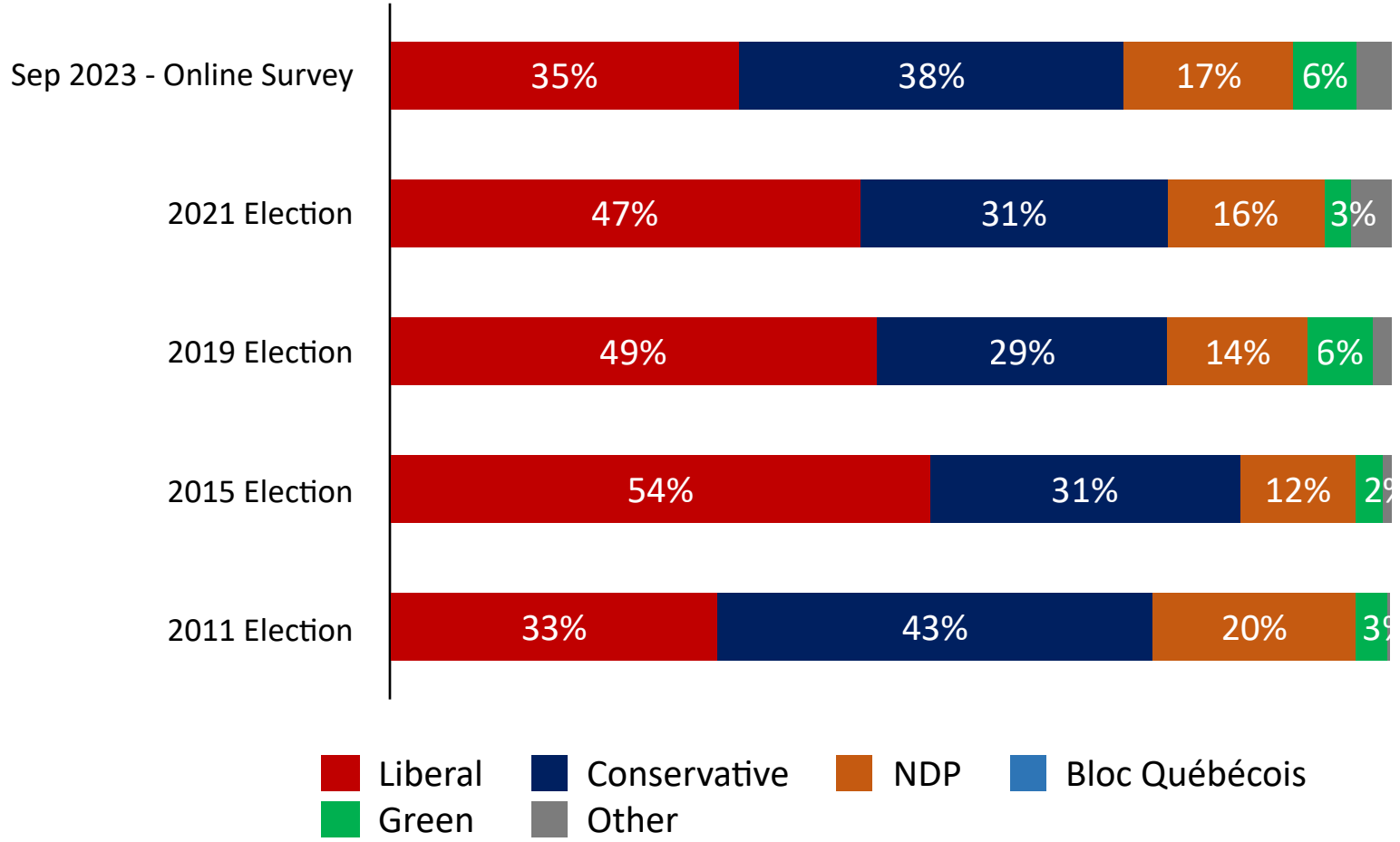
CPC to LPC Defectors: CPC has regained the lead they had in 2011 as Liberals continue to decline, down 12 points since the last election

Decided Vote from September 2023 online survey compared to actual election results between 2011 and 2021



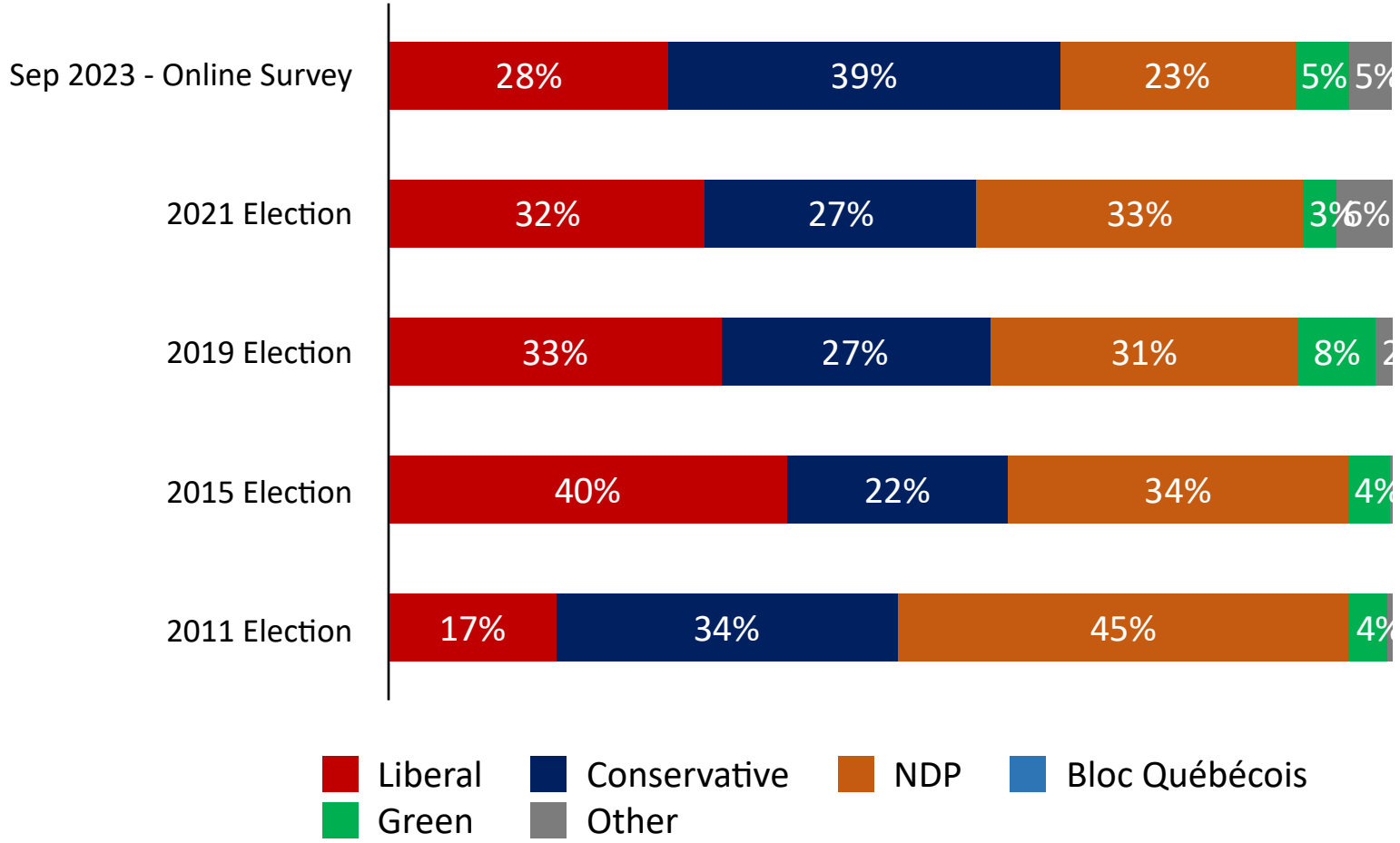
Previously solid Conservative seats that have flipped to the Liberals from 2015 onwards.

Party	Seats Won 2021	Seats Won 2019	Seats Won 2015	Seats Won 2011*
Liberal	32	34	34	0
CPC	1	0	0	34
NDP	0	0	0	0
Green	1	0	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

Swing NDP: Vote intentions for NDP and Liberals are down compared to the last election, while CPC is now leading

Decided Vote from September 2023 online survey compared to actual election results between 2011 and 2021



NDP swing seats over the last 3 elections. This cluster has been trending away from the NDP since 2011.

Party	Seats Won 2021	Seats Won 2019	Seats Won 2015	Seats Won 2011*
Liberal	17	17	18	0
CPC	4	5	0	9
NDP	7	5	10	19
Green	0	1	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

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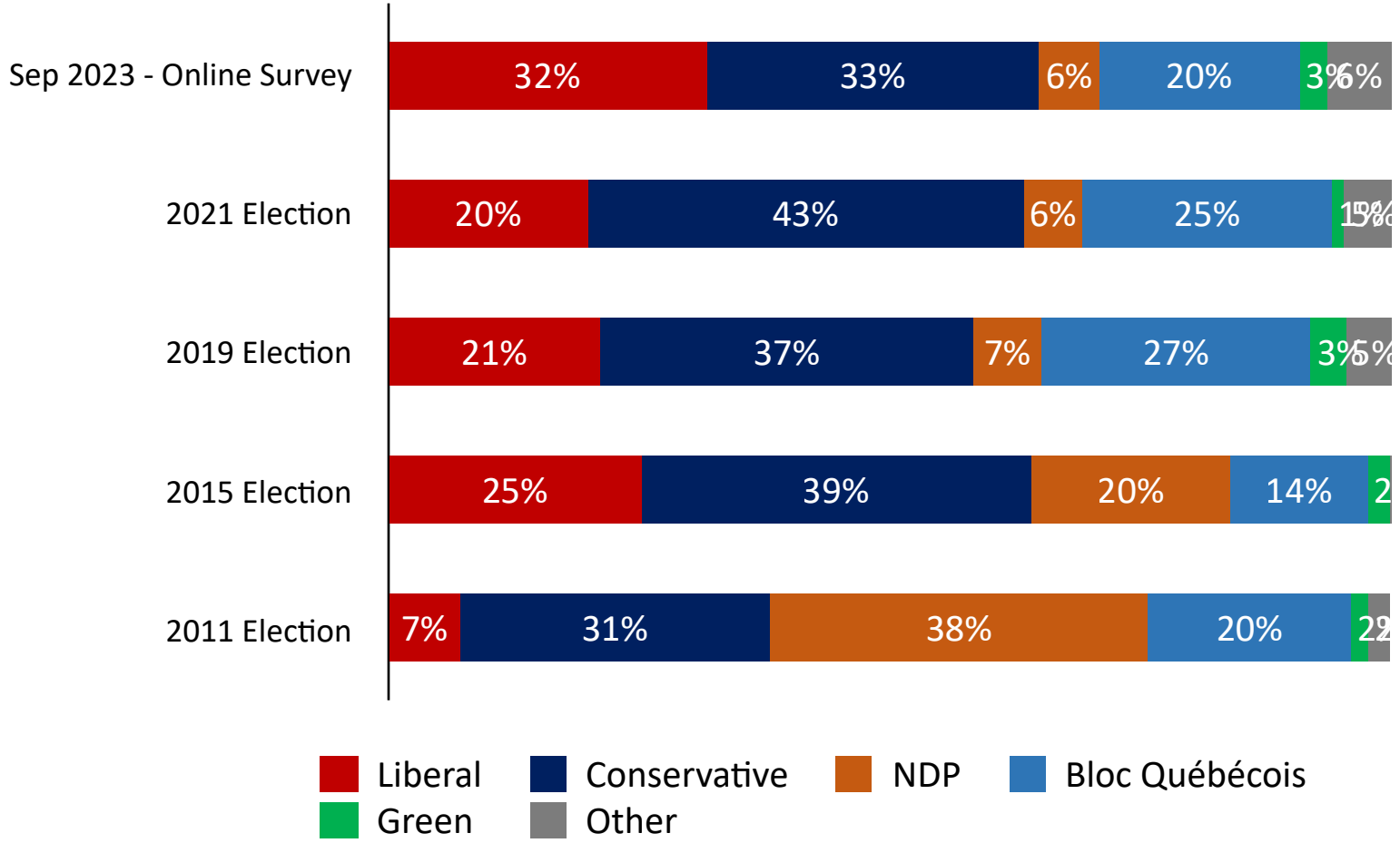
Capitale-Nationale + Chaudière-Appalaches: Bloc and Conservative votes are down, while Liberal intention is up

Decided Vote from September 2023 online survey compared to actual election results between 2011 and 2021



Seats in the Capitale-Nationale and Chaudière-Appalaches region, the Conservatives strongest region in Quebec.

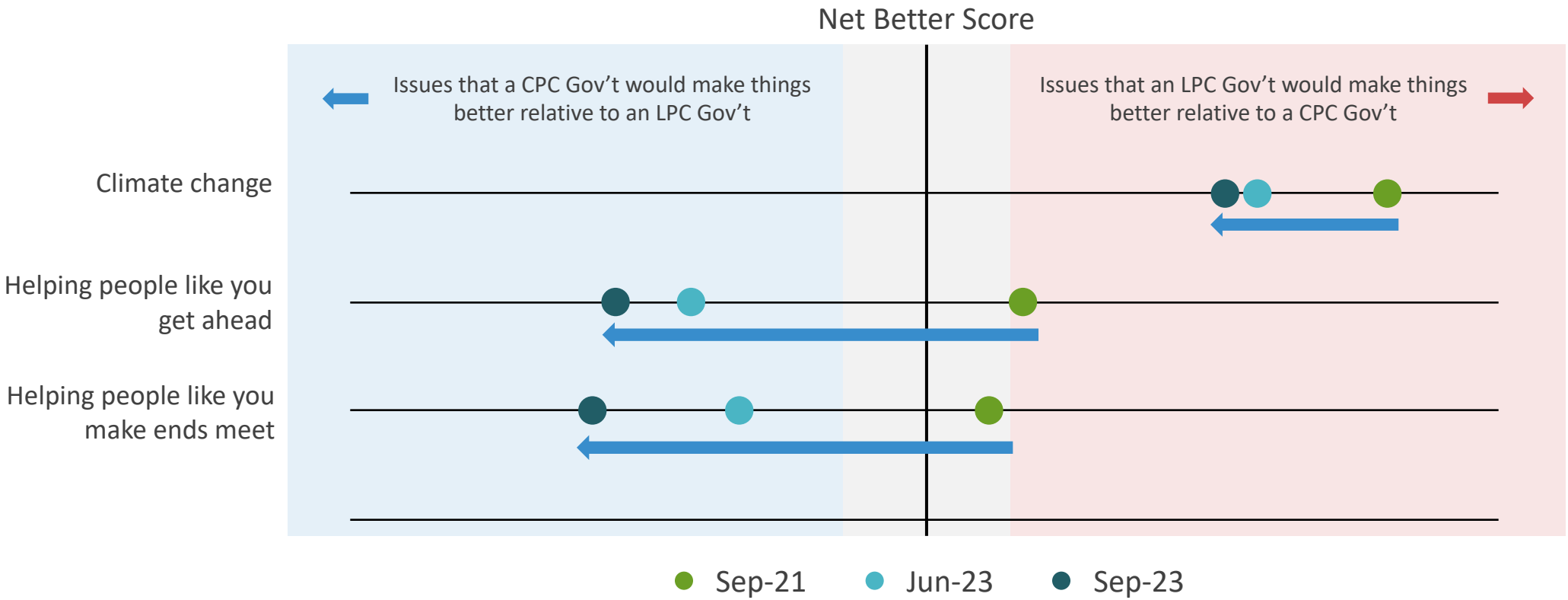
Party	Seats Won 2021	Seats Won 2019	Seats Won 2015	Seats Won 2011*
Liberal	2	2	2	0
CPC	9	9	11	4
NDP	0	0	0	8
Bloc	2	2	0	1

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

Underlying Political Brands

A LPC vs. CPC Government: Conservatives increasingly viewed as being able to handle key issues better than Liberals

Q If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?
[asked of all respondents; n=1,000]

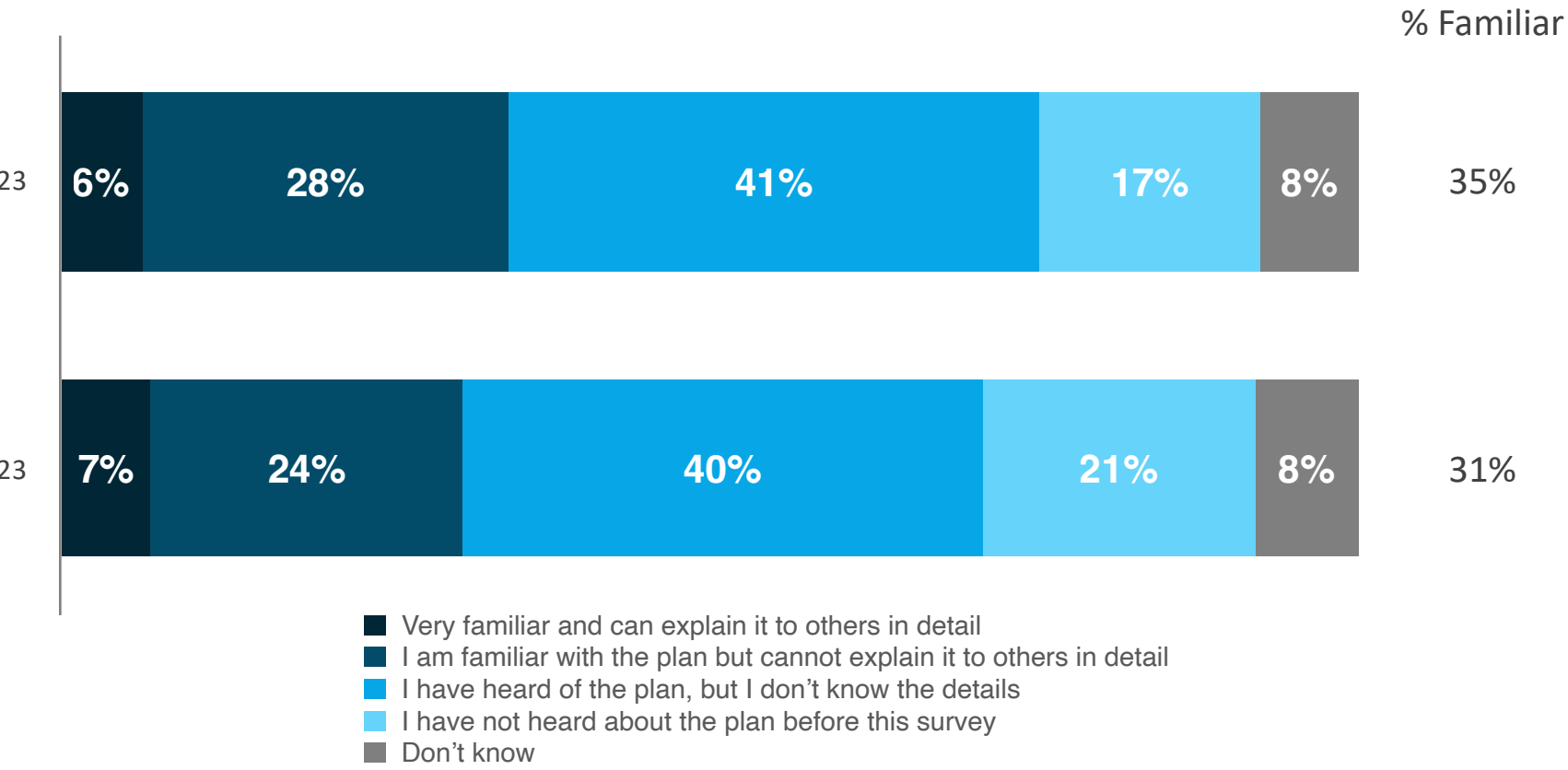


NOTE: Net Better is equal to the sum of much better and somewhat better minus the sum of somewhat worse and much worse.

Federal Energy Politics

Familiarity with Federal Government's Plan: 35% are familiar with the federal govt's plan; highest among men 18-34 (51%)

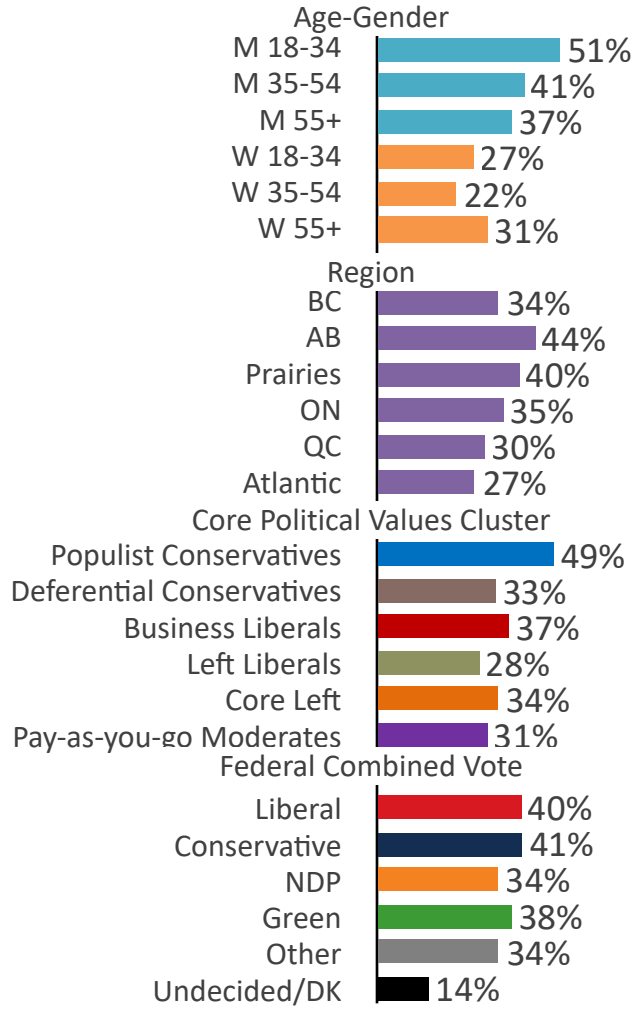
Q How familiar are you with the Federal government's proposed plan for the electricity sector to achieve net zero climate change emissions by 2035?
[asked of all respondents; n=1,000]



NOTE: As the Federal government's proposed plan was recently established, the wording for this question has been changed to reflect this which is slightly different than last wave. The wording for June 2023 was "How familiar are you with the proposed clean energy standard plan for the electricity sector to achieve net zero climate change emissions by 2035?" In addition, the wording for the response "Very familiar and can explain it to others in detail" was worded as "I understand the details and can explain them to others" last wave.

Segmentation

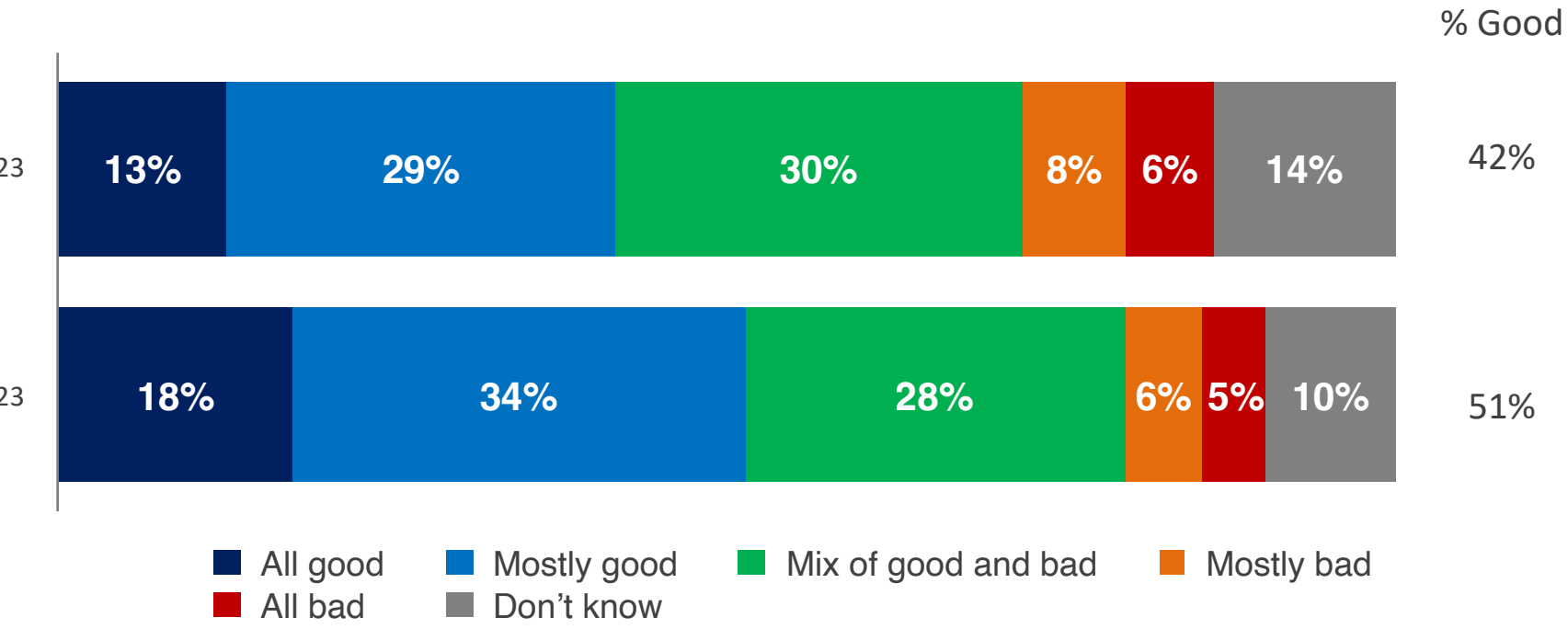
Respondents who say "familiar"



Impression of Clean Energy Regulations: Compared to June, fewer think the plan sounds like a good thing (42%); down 10 pts

Q The Federal government's proposed plan, known as the Clean Energy Regulations, will require provincial electricity grids to shift from using fossil fuels to generate electricity to non-emitting generation to reduce greenhouse gas emissions by 2035.

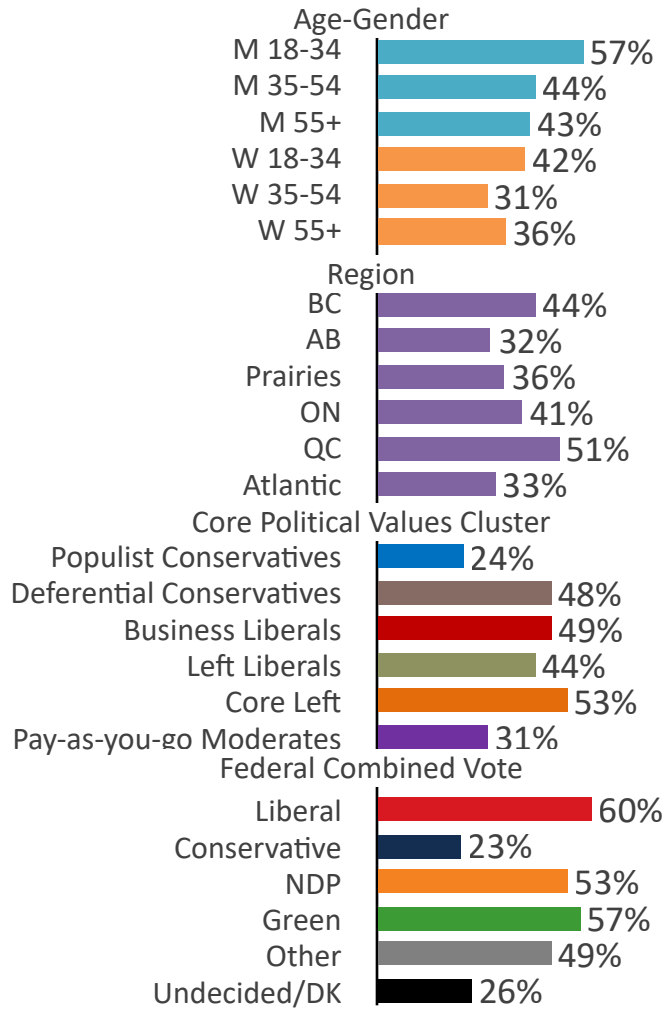
From what you know or based on your first impression, does this plan sound like a good thing or a bad thing?
[asked of all respondents; n=1,000]



NOTE: As the Federal government's proposed plan was recently established, the wording for this question has been changed to reflect this which is slightly different than last wave. The wording for June 2023 was "A clean energy standard will require provincial electricity grids to shift from using fossil fuels to generate electricity to non-emitting generation to reduce greenhouse gas emissions. From what you know or based on your first impression, does the clean energy standard sound like a good thing or a bad thing?"

Segmentation

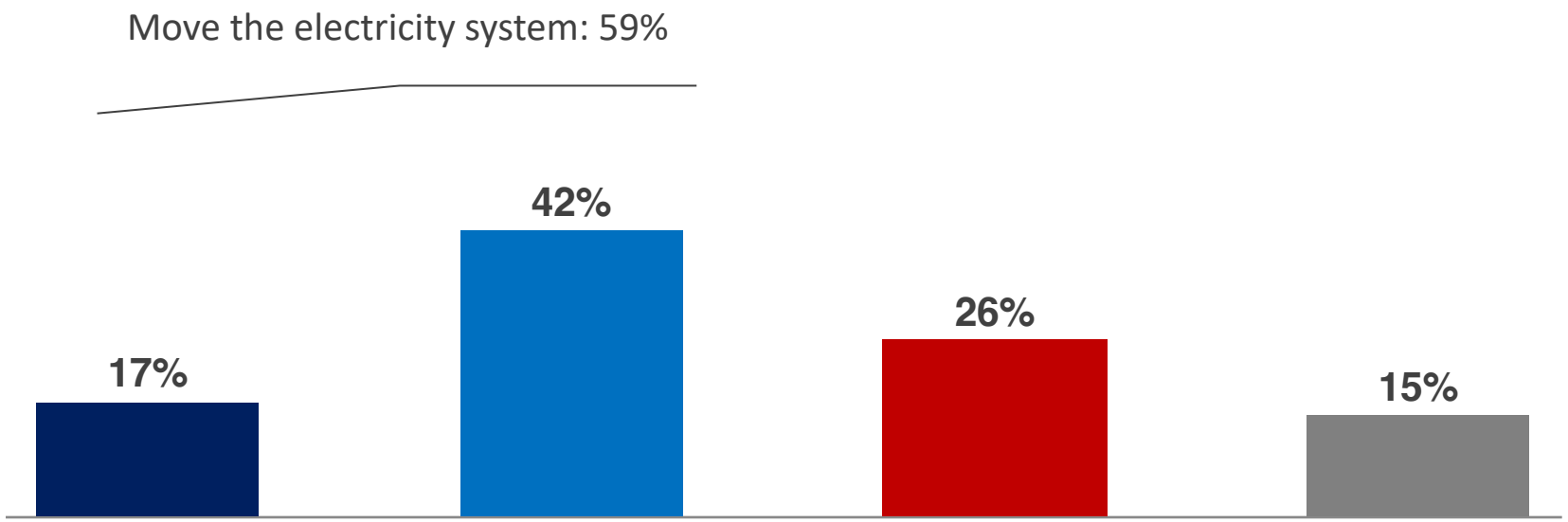
Respondents who say "good"



View on Clean Energy Regulations: 3-in-5 say move to net zero, highest among men 18-34 and Liberal Voters (74%)

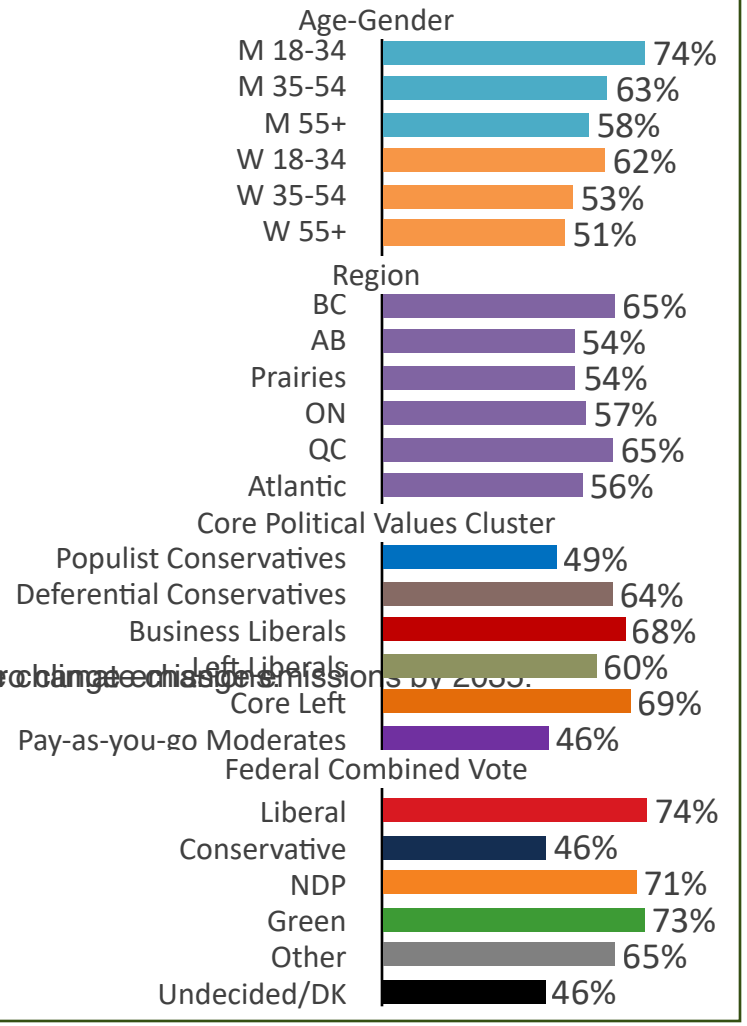
Q There is a debate over the Clean Energy Regulations. Please indicate which of the following statements is closest to your own?

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



Segmentation

Respondents who say "move the electricity system"



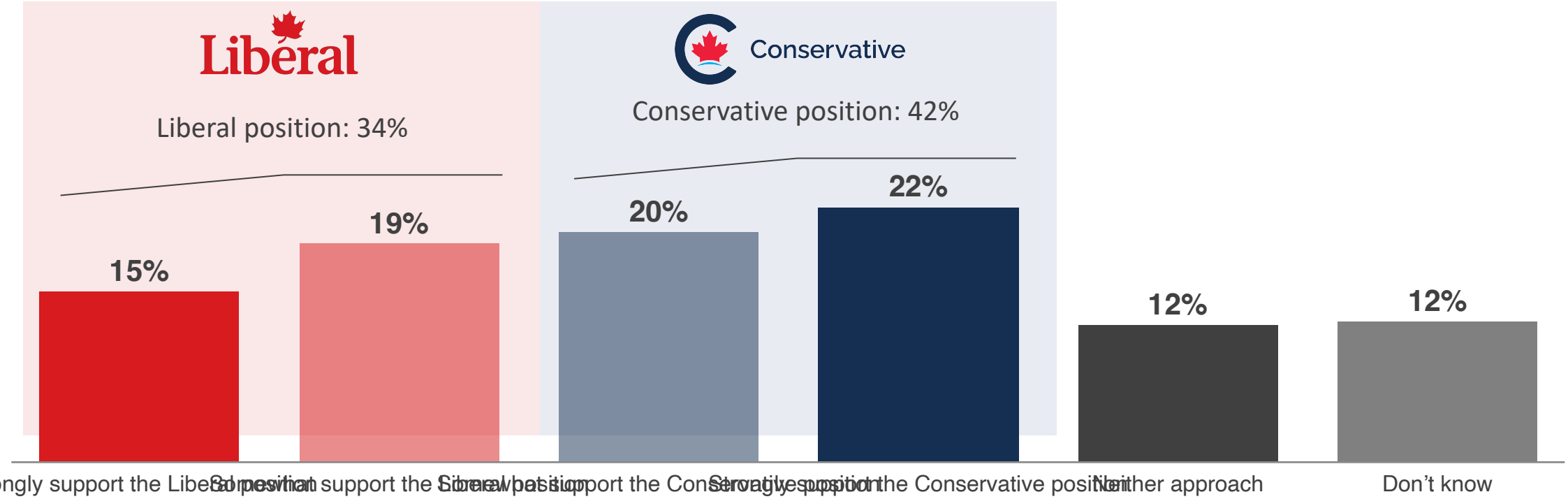
Liberal vs. Conservative Position: Over 2-in-5 (42%) support the Conservative position while 34% support the Liberal position

Q

The Liberal Party of Canada supports establishing Clean Energy Regulations as a way for Canada to show leadership in moving to net zero climate change emissions by 2035, even if it means some increases in electricity prices.

The Conservative Party of Canada opposes establishing Clean Energy Regulations and prefers the federal government avoid increases in electricity prices and focus on encouraging investments in new technology to reduce emissions instead.

Do you tend to support the Liberal approach or the Conservative approach?
[asked of all respondents; n=1,000]



LPC vs. CPC Position by Age/Gender and Region: Women 35+ are much more likely to support the Conservative approach

Q

The Liberal Party of Canada supports establishing Clean Energy Regulations as a way for Canada to show leadership in moving to net zero climate change emissions by 2035, even if it means some increases in electricity prices.

The Conservative Party of Canada opposes establishing Clean Energy Regulations and prefers the federal government avoid increases in electricity prices and focus on encouraging investments in new technology to reduce emissions instead.

Do you tend to support the Liberal approach or the Conservative approach?
[asked of all respondents; n=1,000]

		Age/Gender						Region					
% who support the…	Total	M 18-34	M 35-54	M 55+	W 18-34	W 35-54	W 55+	BC	AB	Prairies	ON	QC	Atlantic
Liberal Position	34%	38%	38%	38%	40%	24%	27%	34%	28%	26%	36%	37%	25%
Conservative Position	42%	47%	43%	43%	36%	43%	42%	48%	56%	52%	40%	33%	40%

LPC vs. CPC Position by Values Cluster/Vote: Populist Conservatives are 4 times more likely to support the CPC position

Q The Liberal Party of Canada supports establishing Clean Energy Regulations as a way for Canada to show leadership in moving to net zero climate change emissions by 2035, even if it means some increases in electricity prices.

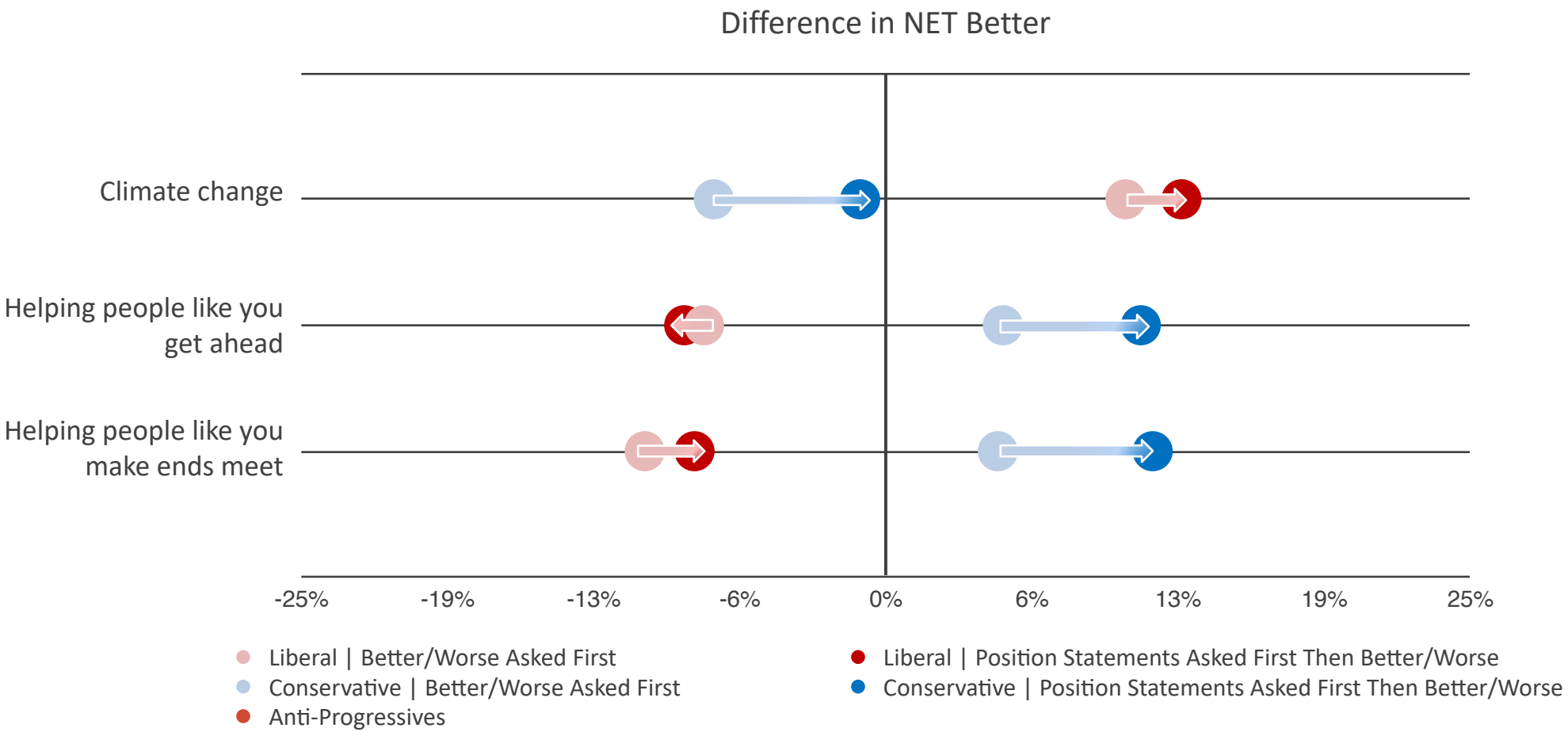
The Conservative Party of Canada opposes establishing Clean Energy Regulations and prefers the federal government avoid increases in electricity prices and focus on encouraging investments in new technology to reduce emissions instead.

Do you tend to support the Liberal approach or the Conservative approach?
[asked of all respondents; n=1,000]

		Core Political Values Cluster						Federal Combined Vote					
% who support the…	Total	Populist Conser-vatives	Defere-ntial Conser-vatives	Busi-ness Liberals	Left Liberals	Core Left	Pay-as-you-go Moder-ates	Liberal	Conser-vative	NDP	Green	Other	Undec-ided/ DK
Liberal Position	34%	17%	32%	35%	35%	48%	29%	64%	8%	49%	44%	38%	19%
Conservative Position	42%	71%	48%	45%	35%	26%	40%	21%	82%	26%	34%	36%	22%

A LPC vs. CPC Government: Awareness of ‘Position’ prior to being asked Better/Worse improved respondents' perception of the CPC

Q If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?
[asked of all respondents; n=1,000]

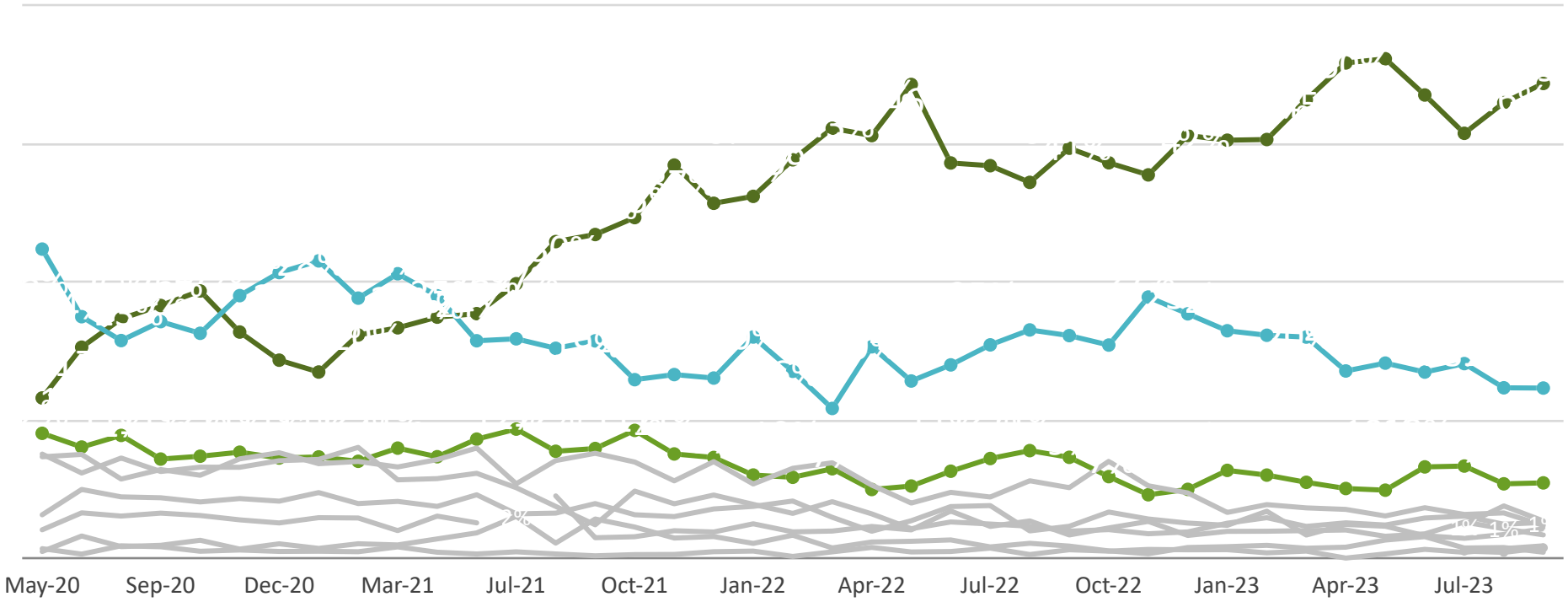


NOTE: Net Better is equal to the sum of much better and somewhat better minus the sum of somewhat worse and much worse.

Issue Matrix

Most Important Issue I ON Tracking: Cost of living as the most important issue continues upward trend since 2021

Q Which of the following issues is the most important issue to you?
[asked of all respondents; results of Ontario are shown; an oversample of Ontario, n=800]



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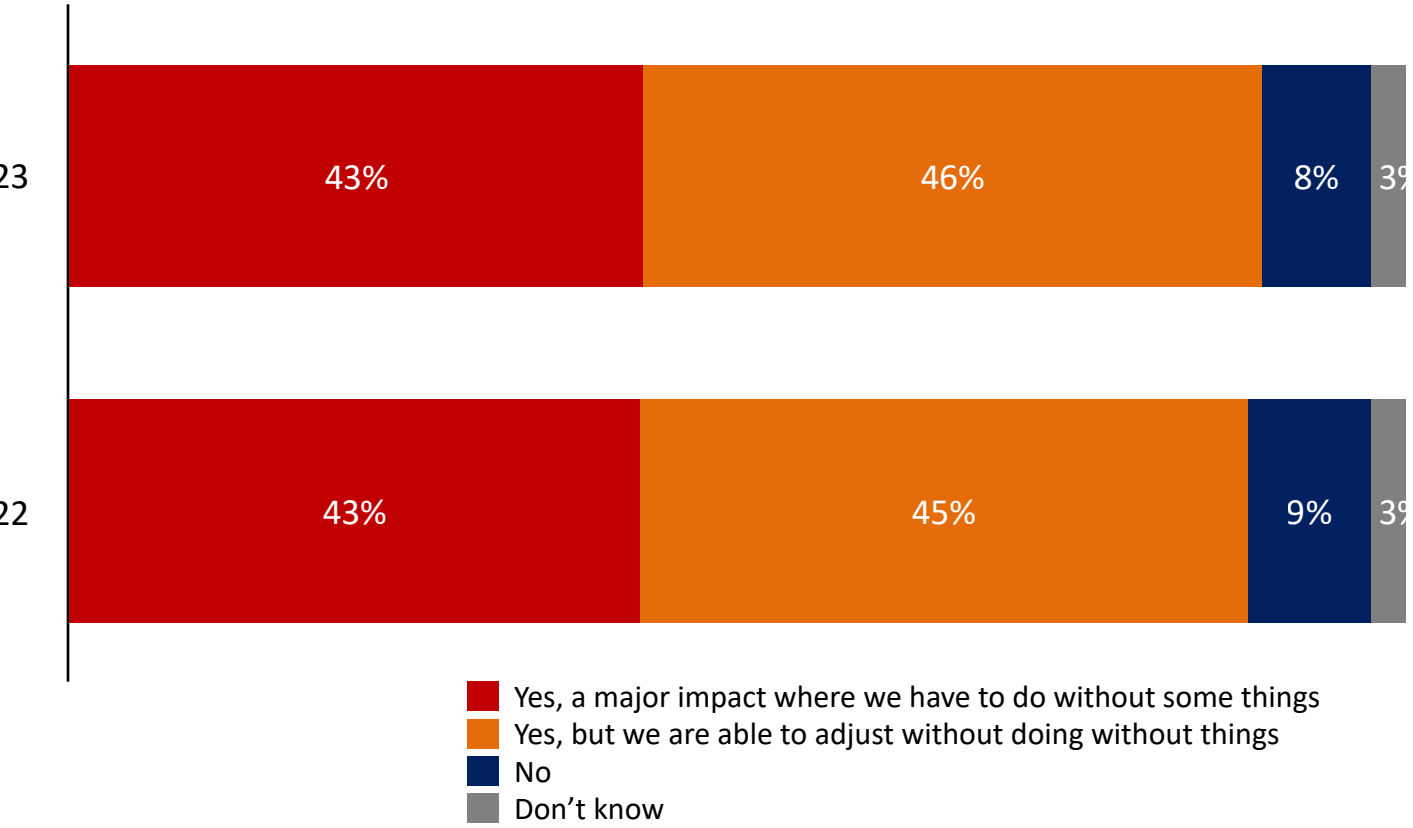
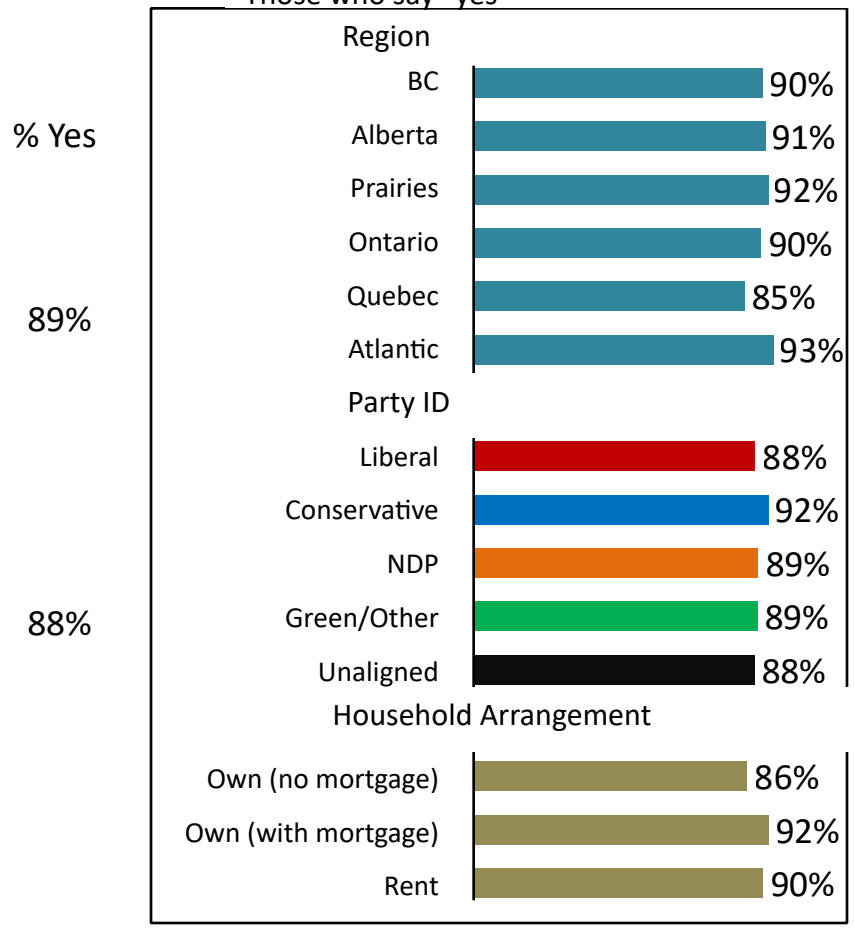
Direct Impact: Nearly 9-in-10 (89%) say inflation directly impacts them; highest among those in Atlantic and those who own with a mortgage

Q Is inflation and the rising cost of living having a direct impact on you today?
[asked of all respondents; n=2,000]



Segmentation
Those who say "yes"



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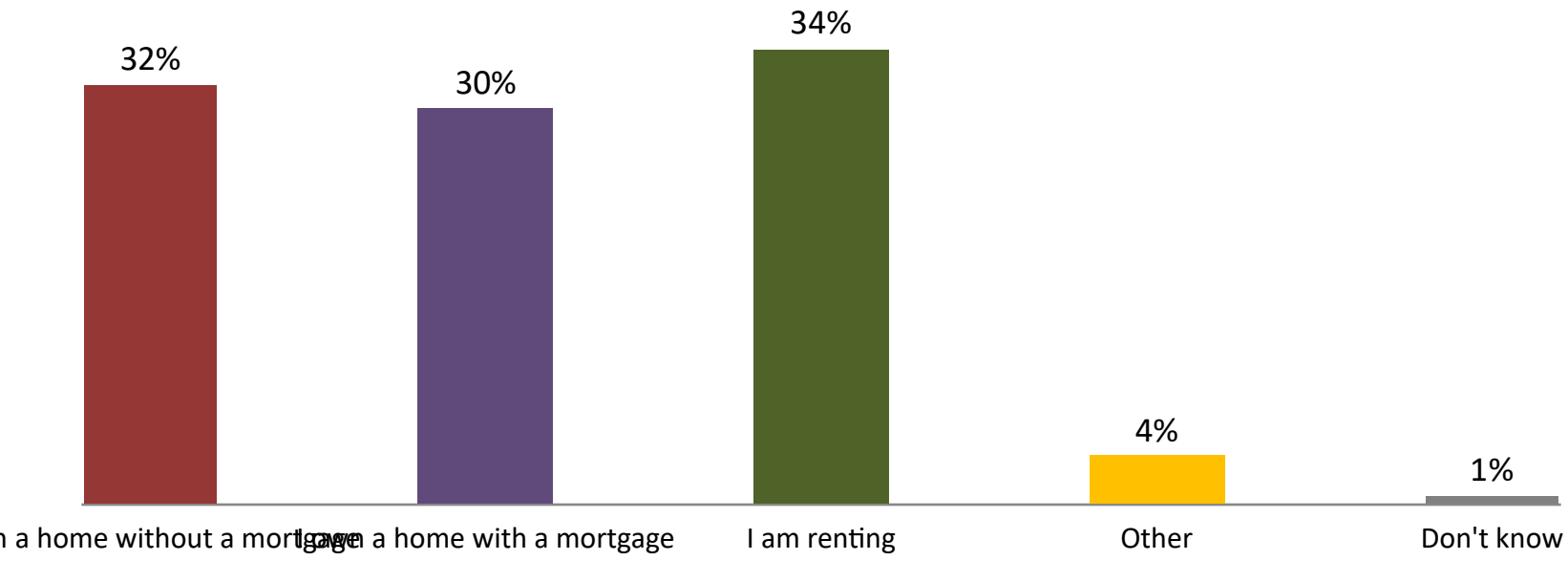
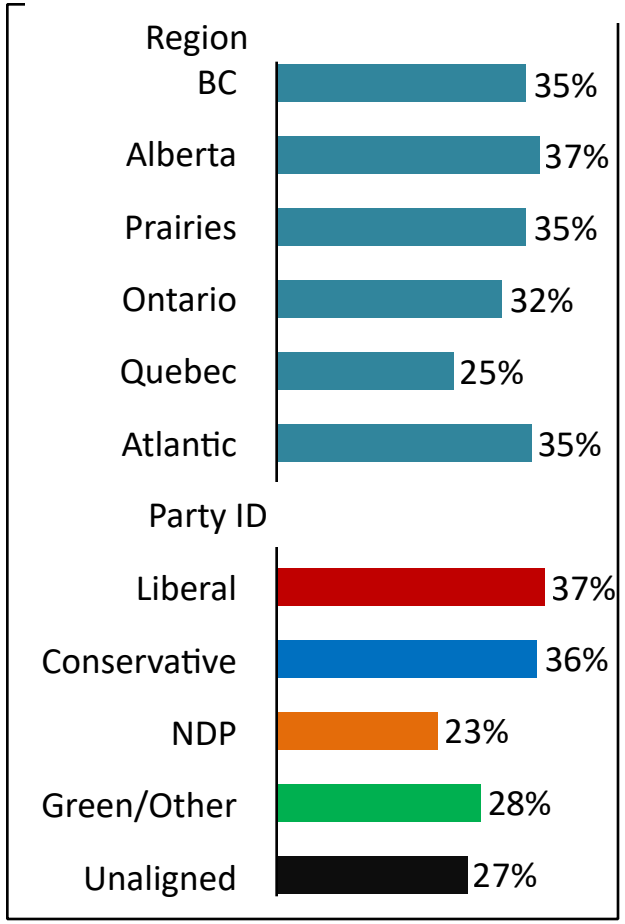
Household Arrangement: Since last year, the proportion of those who own a house without a mortgage increased by 4 points

Q Which of the following best applies to your current situation?
[asked of all respondents; n=2,000]



Segmentation
Those who own a home without a mortgage



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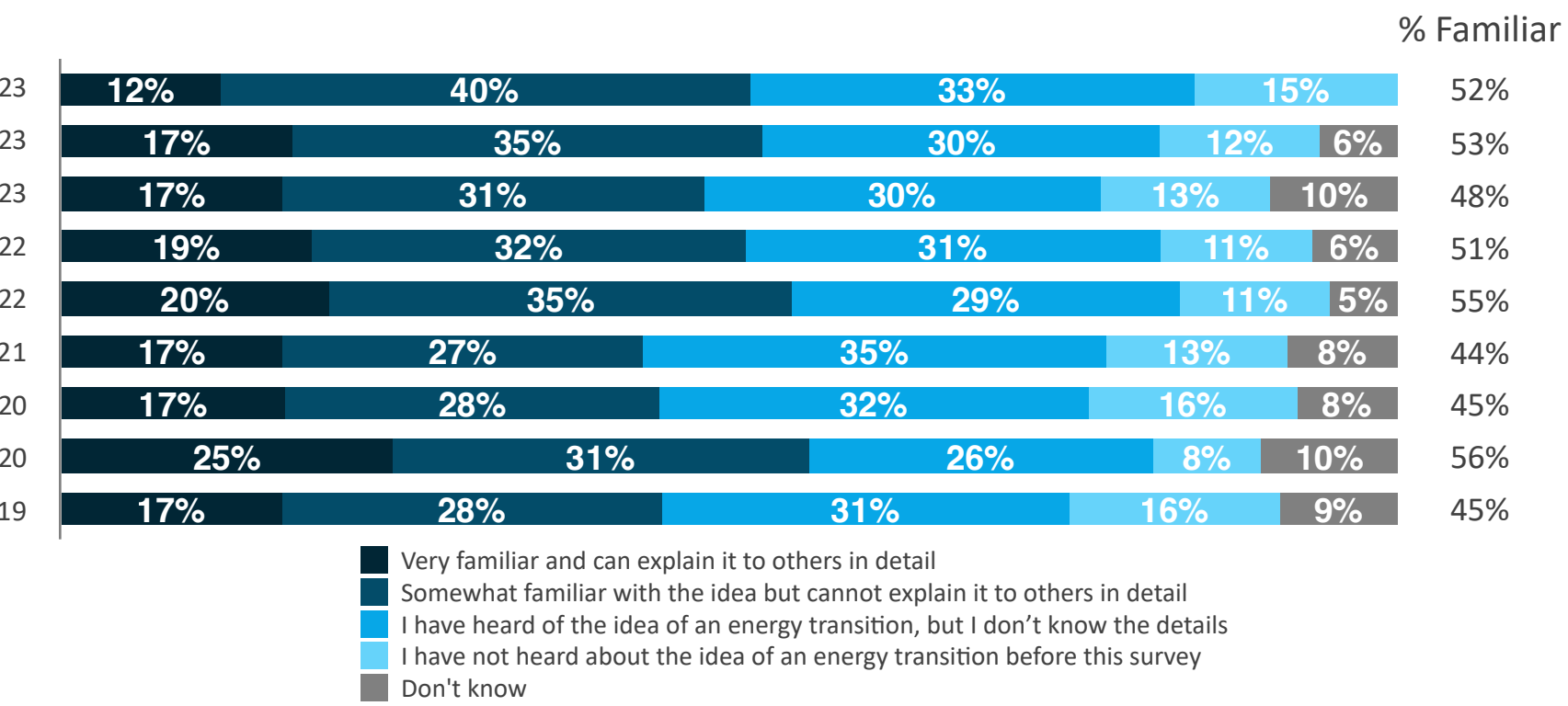
Energy Transition Awareness

Familiarity with Energy Transition: At over half (52%), familiarity with energy transition has remained stagnant since 2019

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.

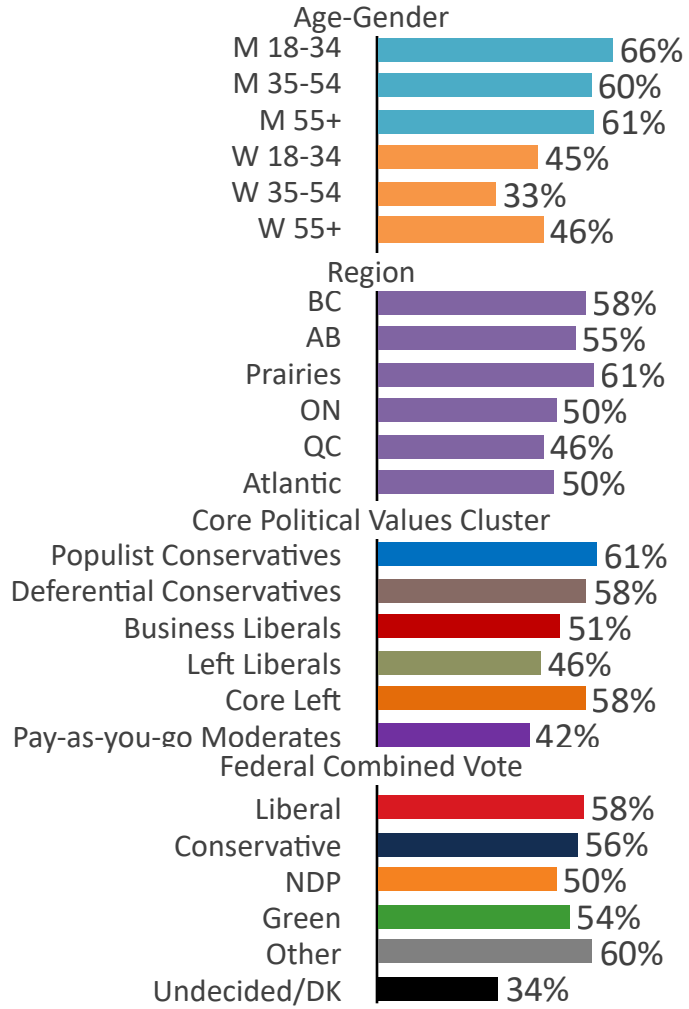
How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?
[asked of all respondents; n=1,000]



NOTE: "Don't know" was not included as an option during this wave. In addition, wording for two response options are slightly different from November 2019 to April 2023 i.e. "Very familiar and can explain it to others in detail" was "I understand the details and can explain them to others" while "Somewhat familiar with the idea but cannot explain it others" was "I am familiar with the idea of an energy transition but cannot explain it to others".

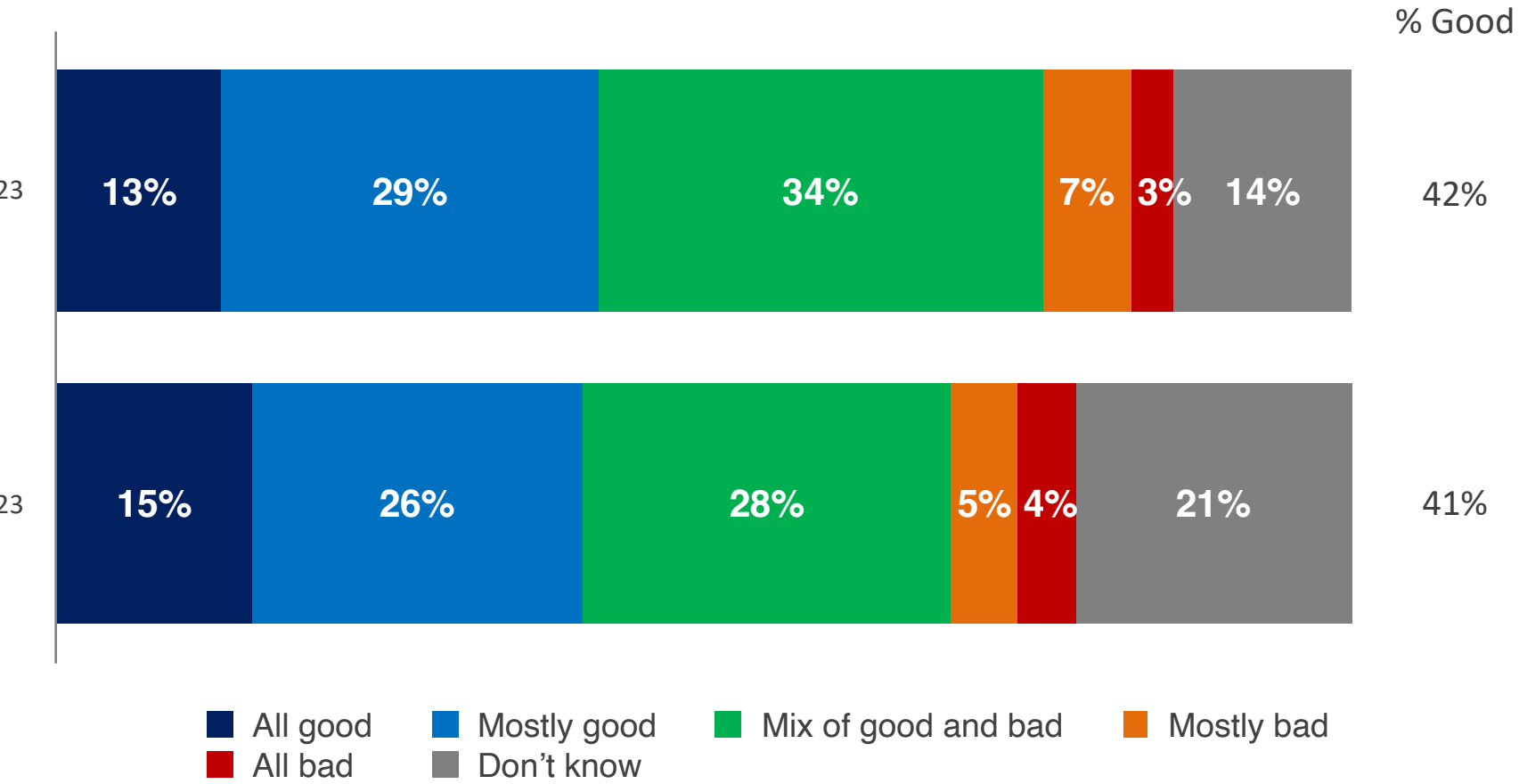
Segmentation

Respondents who say "familiar"

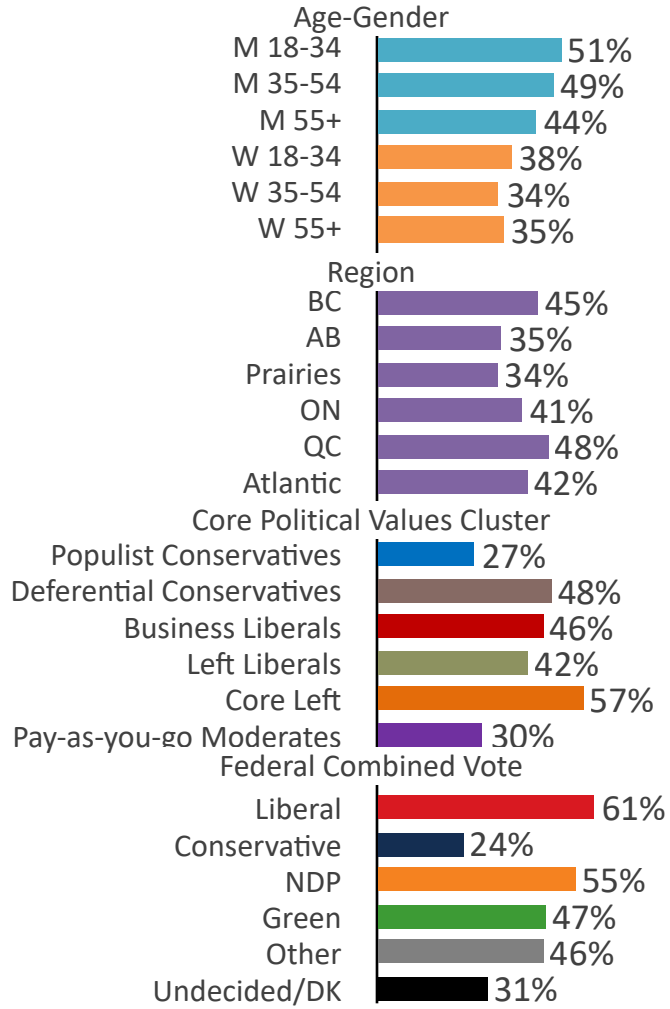


Impression of Energy Transition: 4-in-10 generally feel good about the energy transition

Q From what you know or based on your first impression, does energy transition sound like a good thing or a bad thing?
[asked of all respondents; n=1,000]

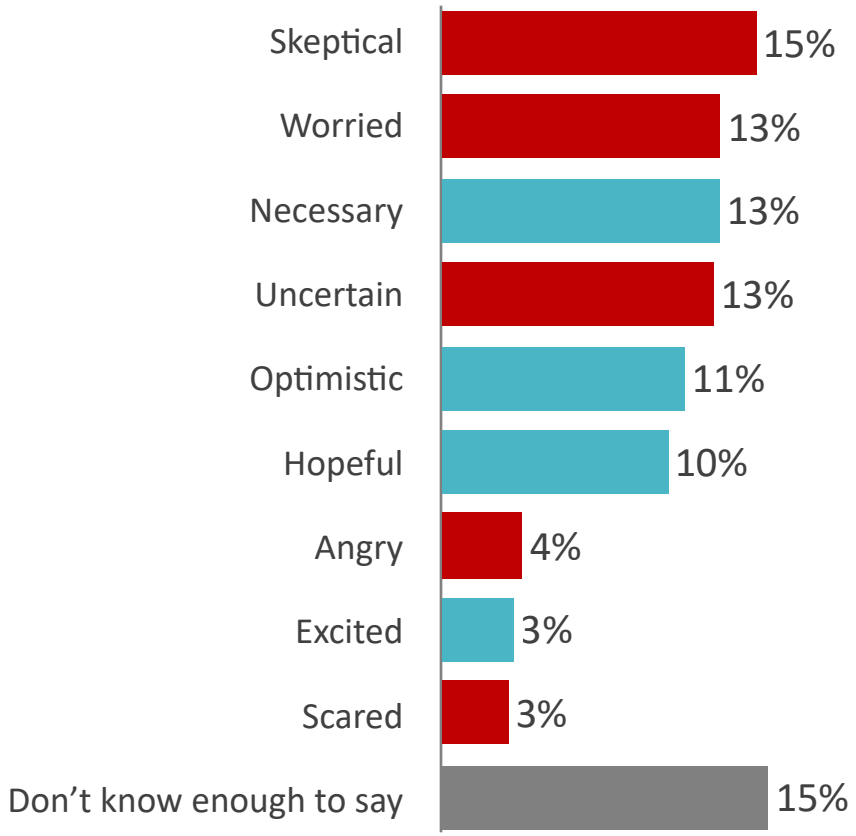


Segmentation
Respondents who say "good"



Reaction to Energy Transition: Negative feelings towards the energy transition outweigh the positive, but familiarity matters a lot

Q How does the idea of energy transition make you feel? Please select the option that reflects your first reaction when you think about energy transition.
[asked of all respondents; n=1,000]



Reaction to Energy Transition by Familiarity

% who…	Total	Familiarity with Energy Transition: Very Familiar	Somewhat Familiar	Heard of it but don't know the details	Have not heard of it
Have a Positive Reaction	38%	55%	49%	29%	14%
Have a Negative Reaction	47%	44%	46%	53%	37%
Don't know enough to say	15%	<1%	5%	18%	48%

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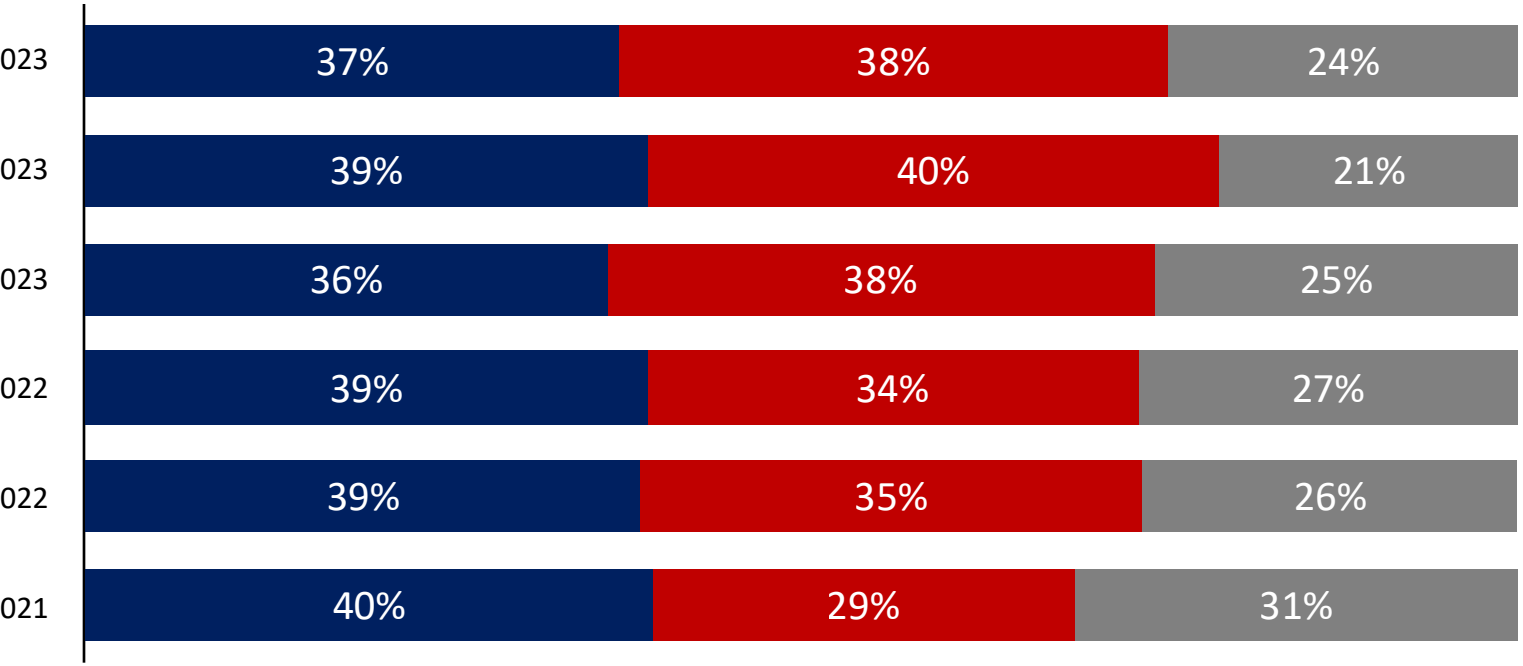
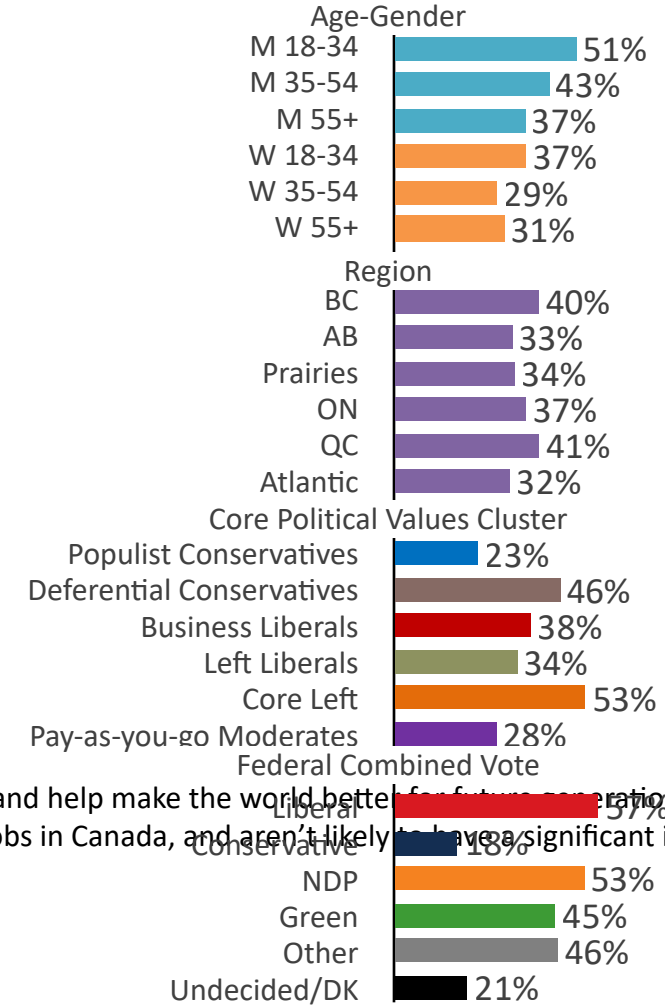
View on Government Energy Transition Policies: Energy Transition skeptic narrative up 9 points since 2021

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
- Don't know

Segmentation
Respondents who say "show Canada is a leader"

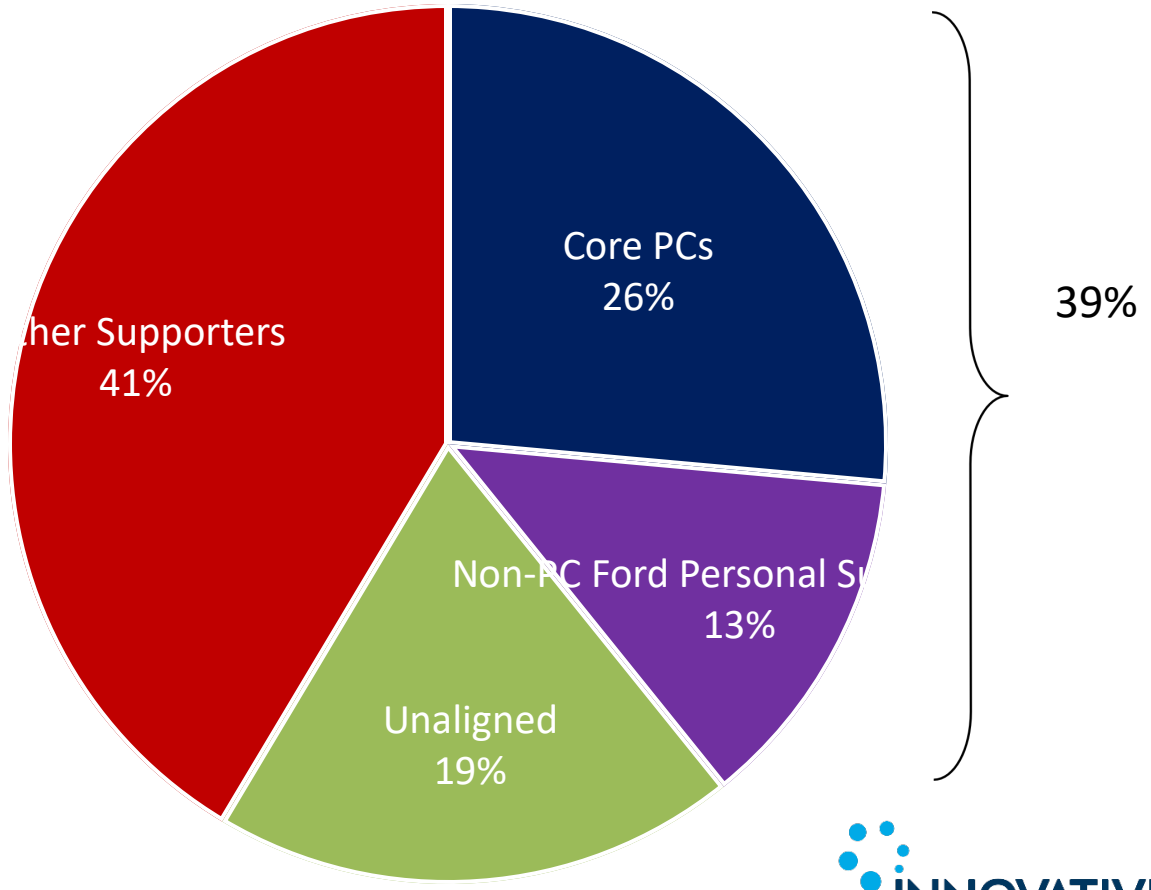


Ontario Politics

Q

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



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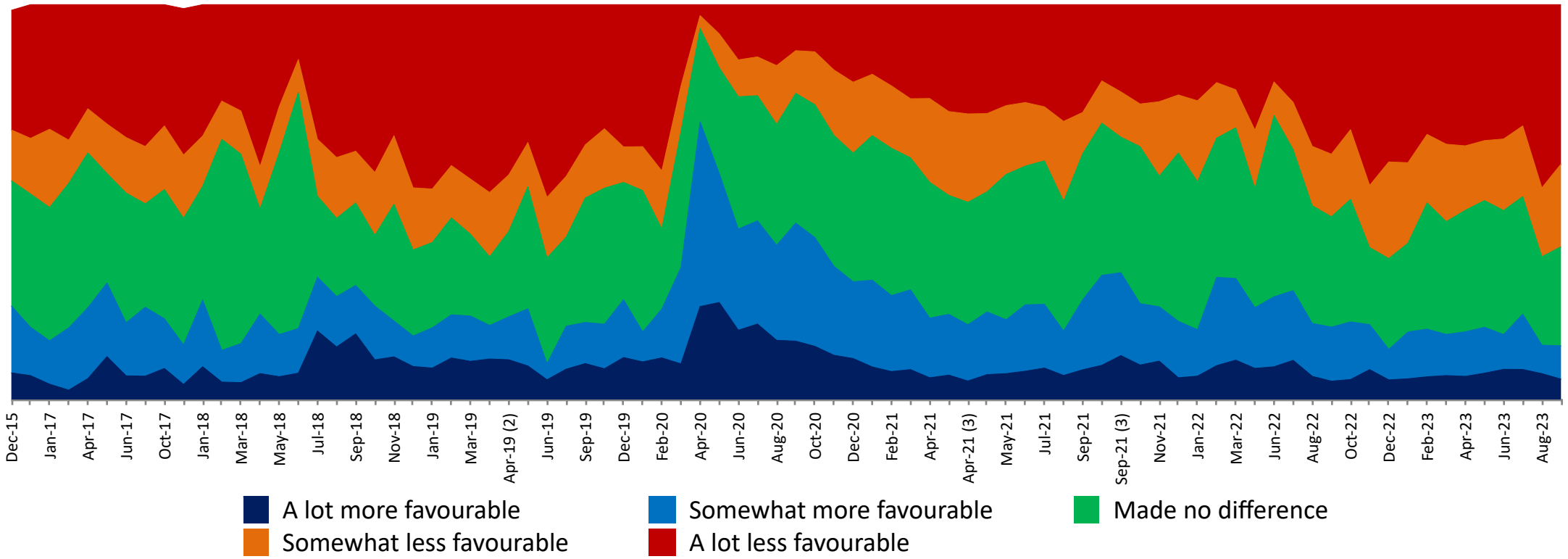
Sep 2023
26%
13%
19%
41%
Jul 2023
26%
15%
17%
41%
2022 Post-Election Survey
30%
15%
17%
37%
Core PCs
Non-PC Ford Personal Supporters
Unaligned
Other Supporters

Q



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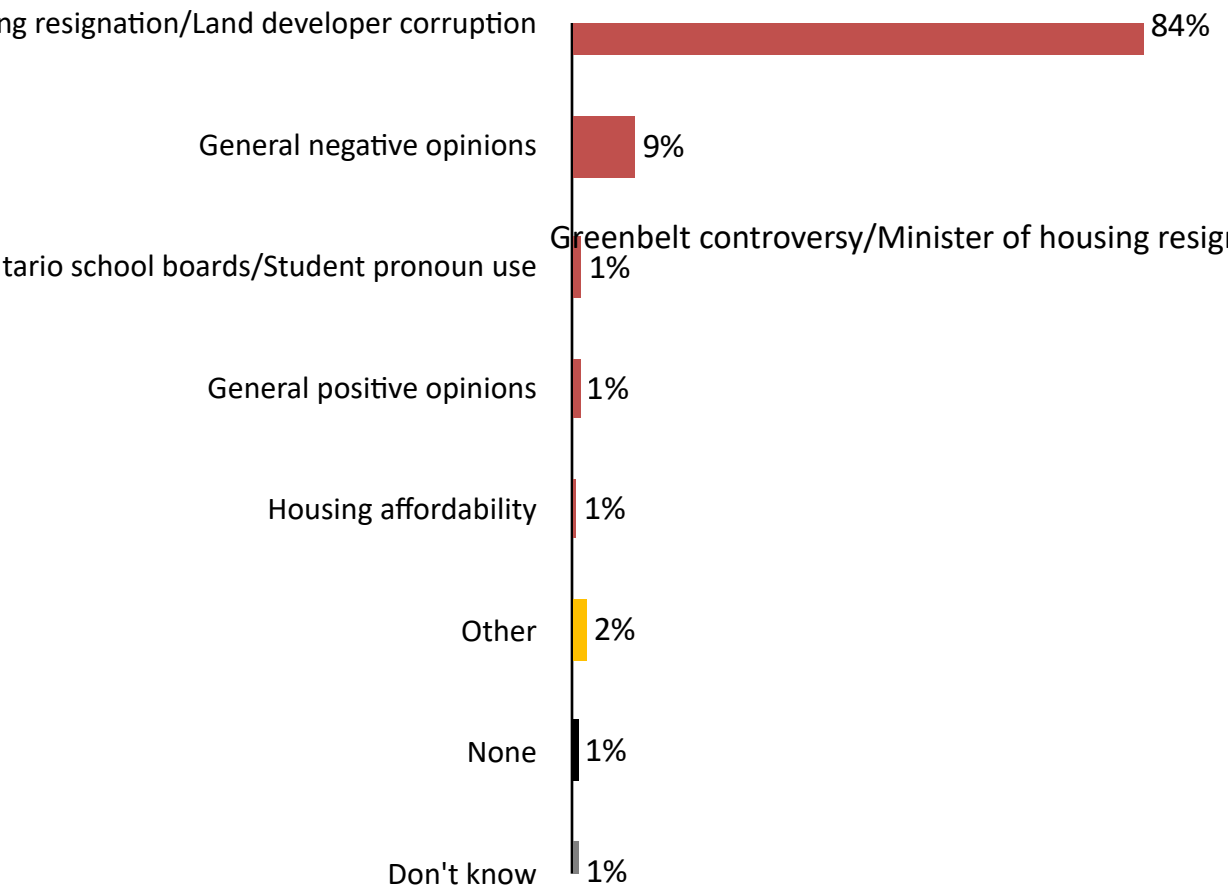
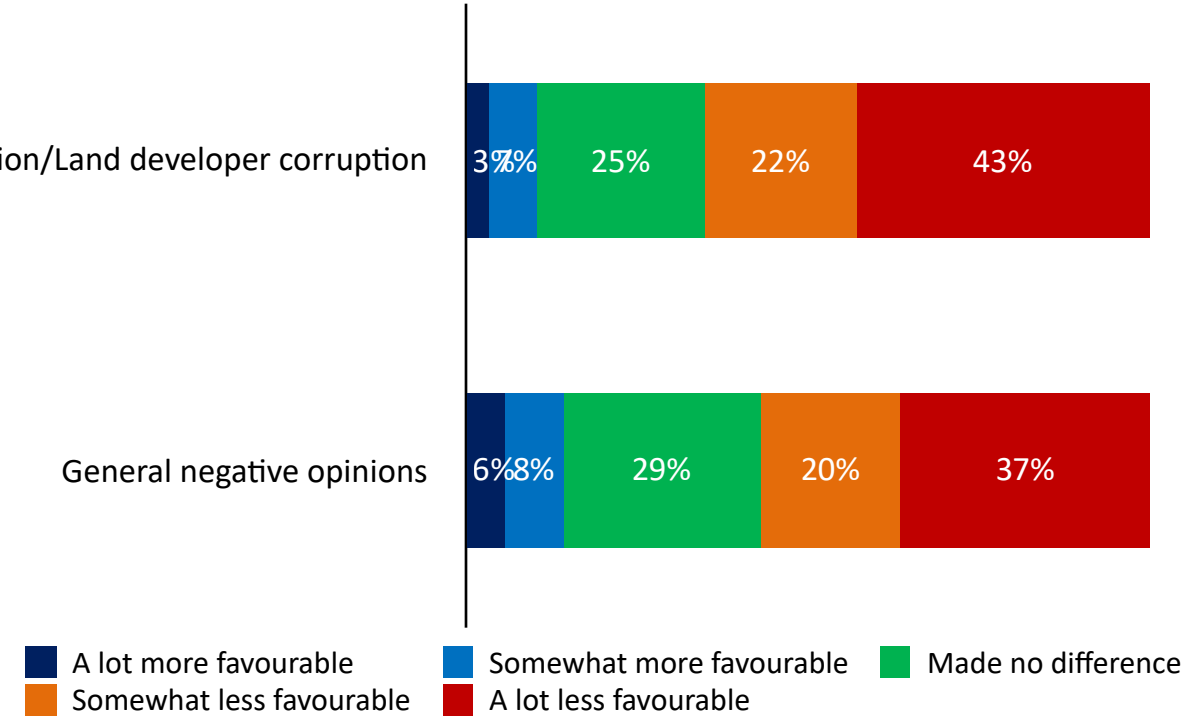
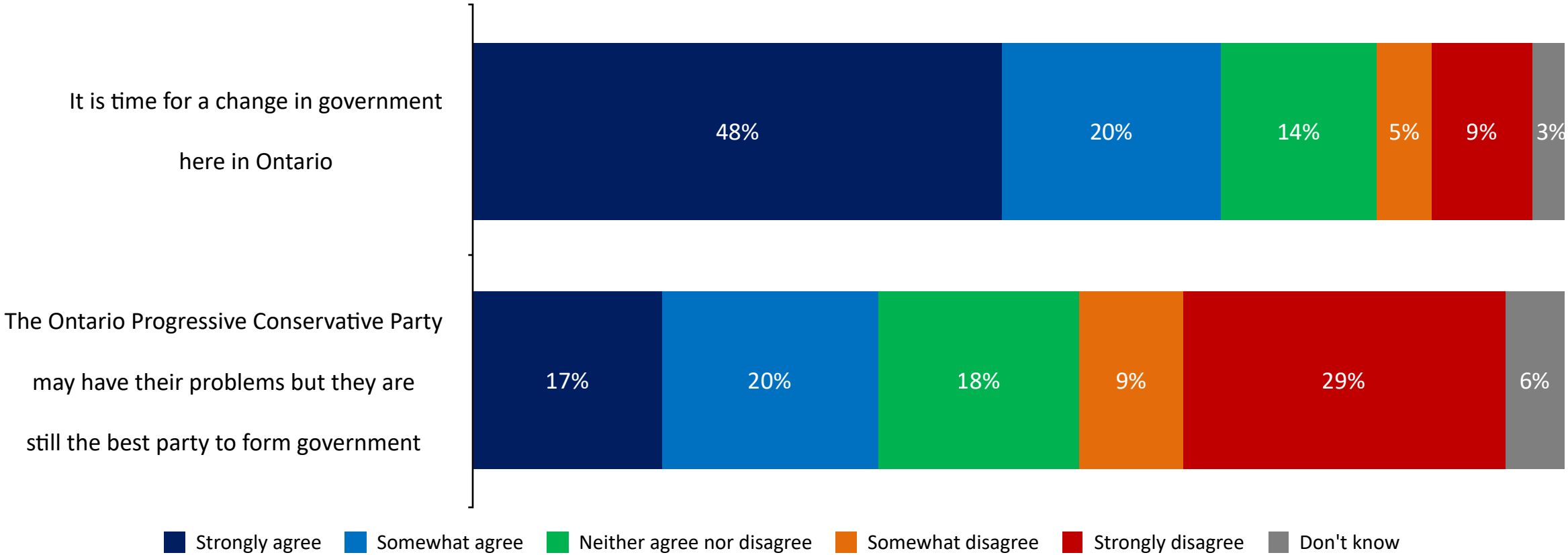

ng resignation/Land developer corruption
84%
General negative opinions
9%
tario school boards/Student pronoun use
Greenbelt controversy/Minister of housing resignation/Land developer corruption
1%
General positive opinions
1%
Housing affordability
1%
Other
2%
None
1%
Don't know
1%


Greenbelt controversy/Minister of housing resignation/Land developer corruption
3%
7%
25%
22%
43%
General negative opinions
6%
8%
29%
20%
37%
A lot more favourable
Somewhat more favourable
Made no difference
Somewhat less favourable
A lot less favourable

Q



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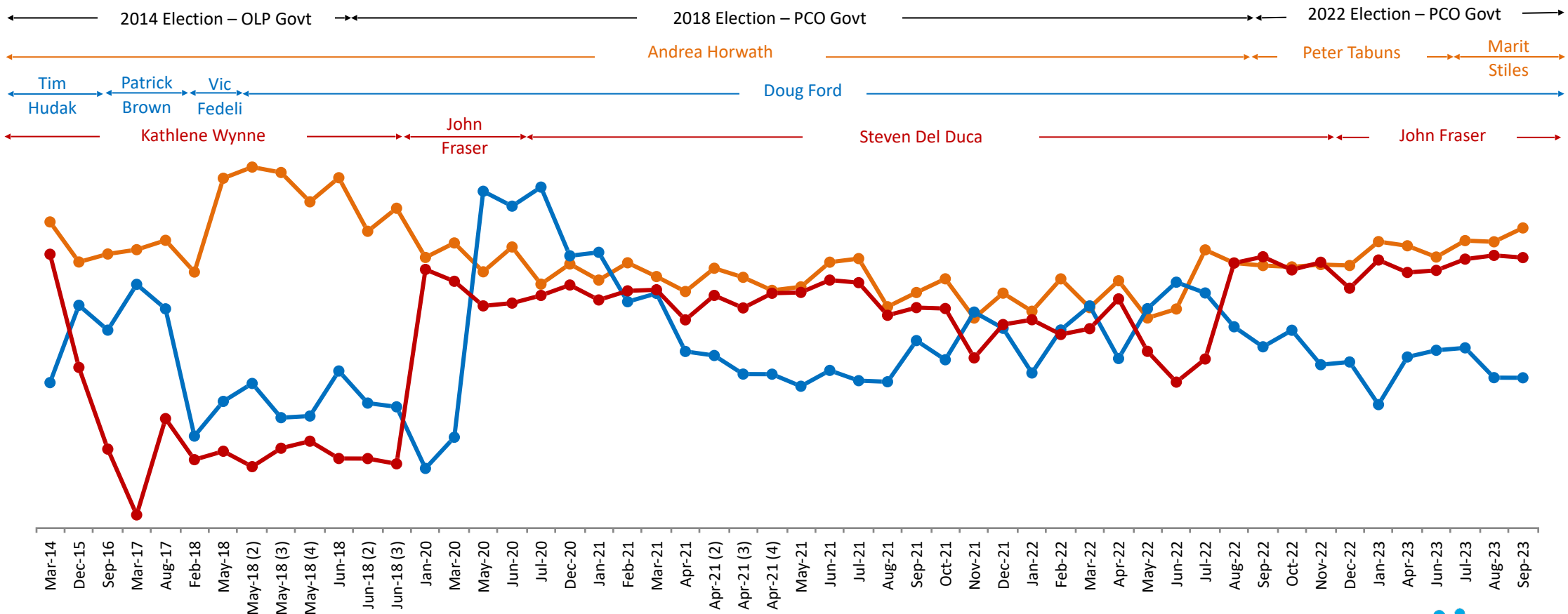

- OLP Leader: Fraser/Del Duca/Wynne/McGuinty
- PCO Leader: Ford/Fedeli/Brown/Hudak
- ONDP Leader: Stiles/Tabuns/Horwath

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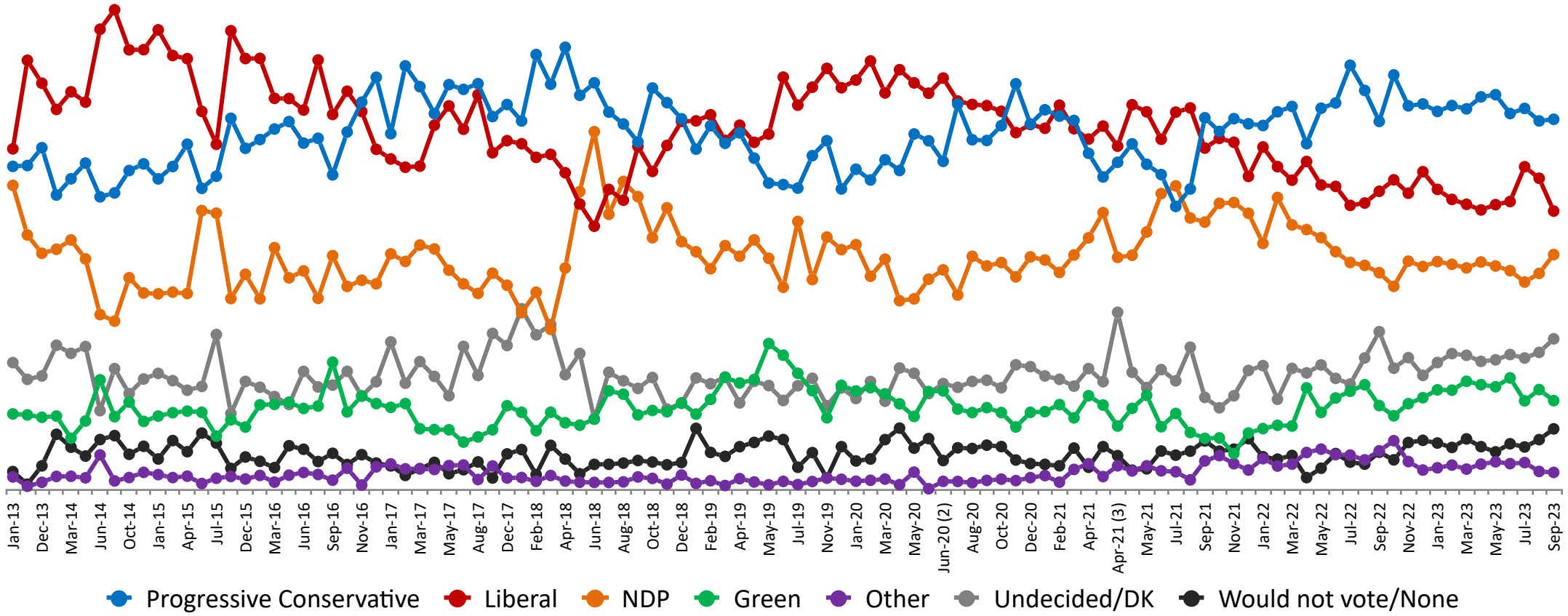

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	Toronto	Rest of GTA	South/West	North/East
	(N=242)	(N=298)	(N=293)	(N=321)
Liberal	34%	29%	22%	28%
Progressive Conservative	30%	41%	40%	37%
NDP	28%	21%	25%	22%
Green	7%	8%	10%	11%
Other	2%	1%	3%	2%

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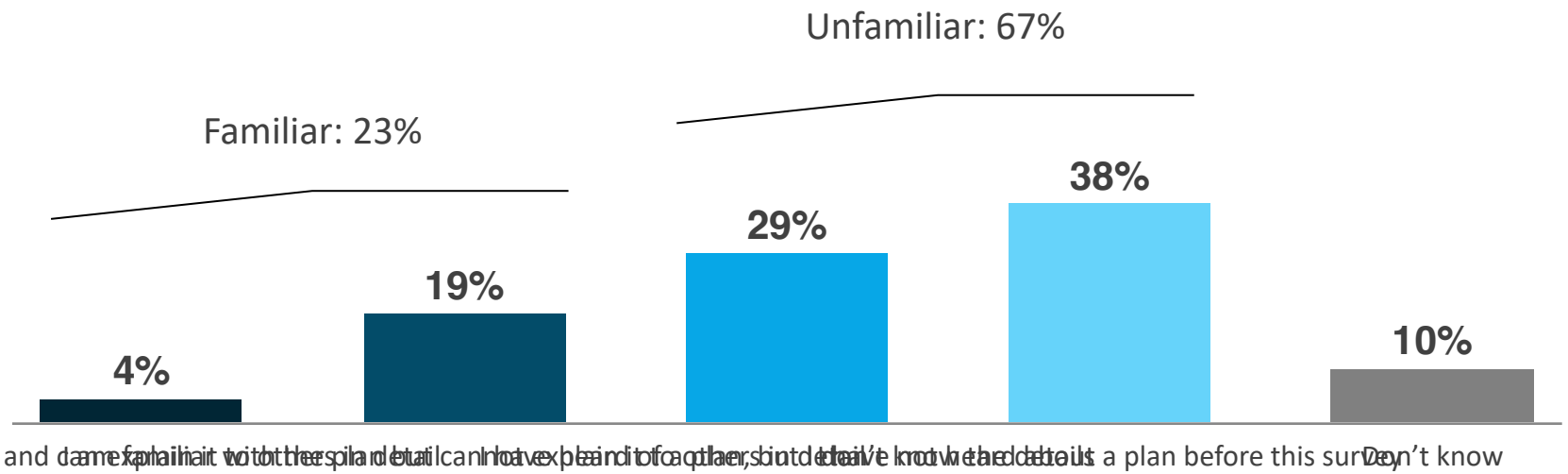
Ontario Energy Politics

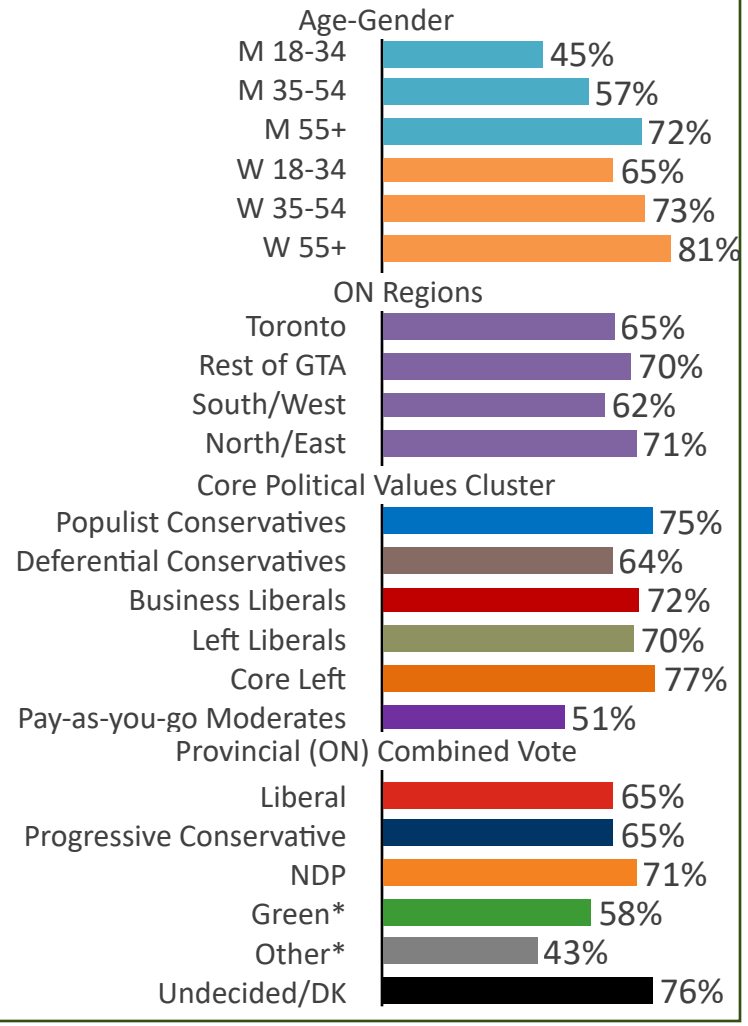
Familiarity with Ontario Government's Plan: Most Ontarians are unfamiliar with the provincial government's plan

Q Demand for electricity in Ontario is expected to double between now and 2050.

How familiar are you with the Ontario government's plan to meet the province's growing demand for electricity?
[only asked of Ontario respondents; n=800]



Segmentation
Respondents who say "unfamiliar"



NOTE: *indicates n-size of less than 30.

Impression of Ontario's Plan: A plurality (42%) say Ontario's plan sounds like a mix of good and bad

Q To meet growing provincial demand for electricity, the Ontario provincial government has recently announced what it calls its Powering Ontario's Growth plan. This plan includes:

- Expanding new renewable energy generation, such as wind and solar, and
- Investing a billion dollars in "energy-efficiency programs" to help lower demand.

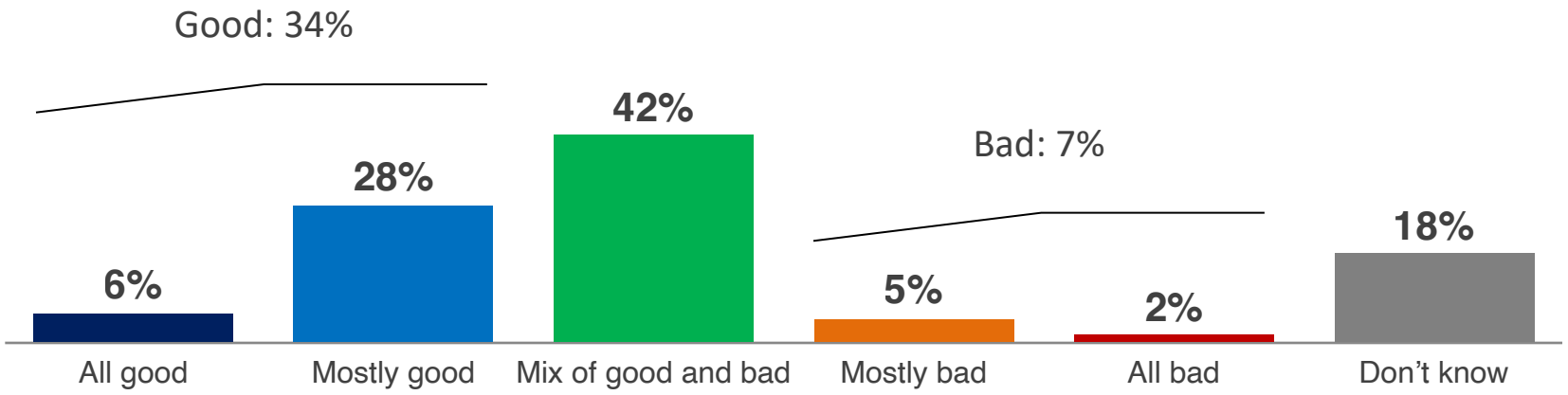
The Ontario provincial government has approved or is considering:

- Expanding the province's nuclear generation capacity, and
- Adding new large-scale energy storage solutions.

Until this new non-emitting electricity capacity comes online, Ontario will continue to use natural gas power generation for peak needs or shortfalls in electricity supply.

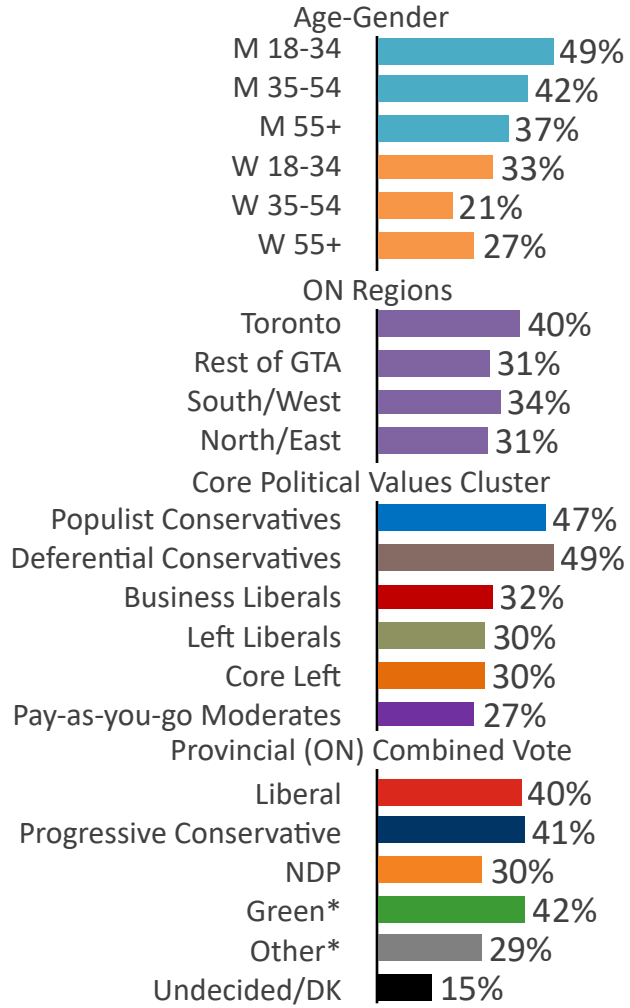
From what you know or based on your first impression, does Ontario's plan sound like a good thing or a bad thing?

[only asked of Ontario respondents; n=800]



Segmentation

Respondents who say "good"



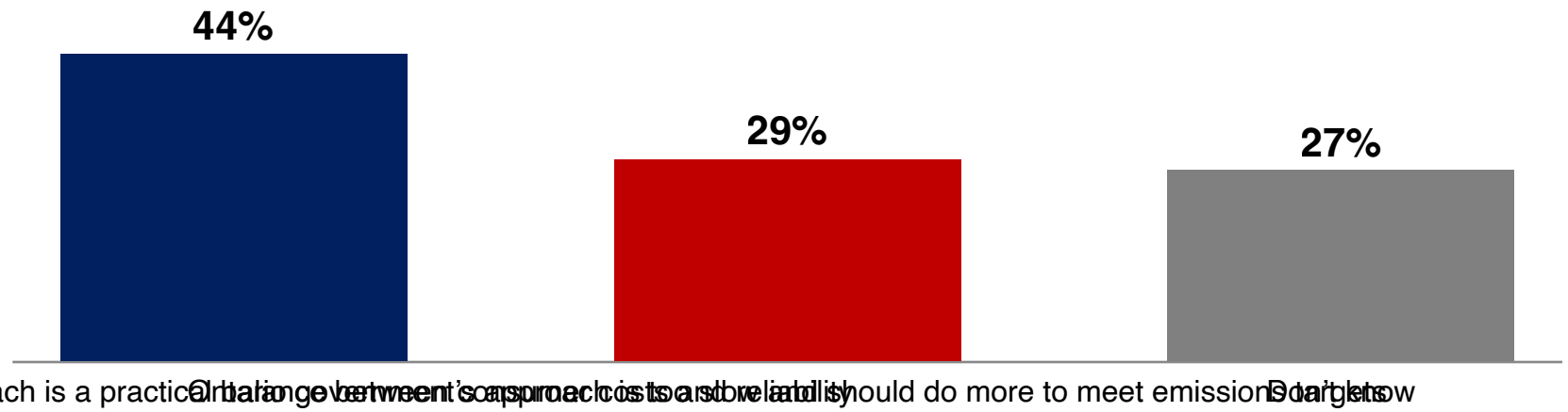
NOTE: *indicates n-size of less than 30.

View on Ontario Government's Approach: 44% say the Ontario government's approach is a practical balance

There are different points of view about the Ontario provincial government's approach to meeting growing provincial demand for electricity.

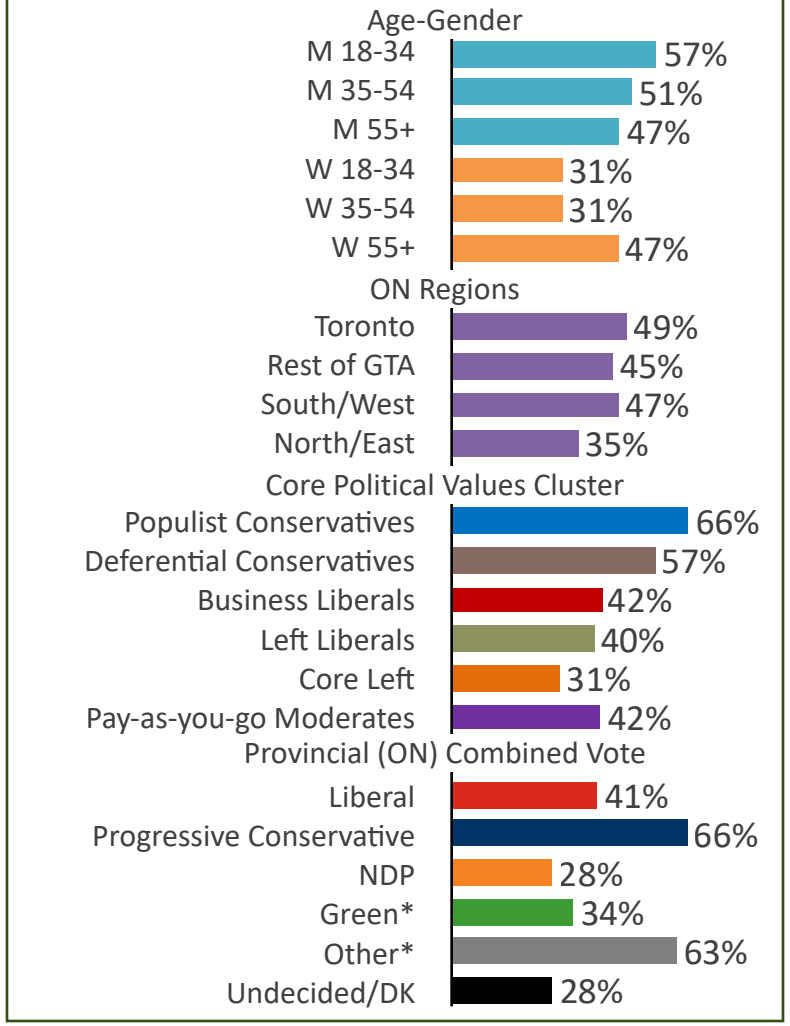
The Ontario government says this is a practical approach based on current reliable and affordable technologies. They feel it embraces new green technologies while protecting consumer from unreasonable cost increases and future reliability concerns.

Some other groups feel the Ontario government is moving too slow and should do more to meet net zero electricity generation by 2035, even if it costs more in the short run. They are concerned about the costs and timelines of adding more large-scale nuclear generation as well as the potential of increasing emission from prolonged use of natural gas generation.



Segmentation

Respondents who say "approach is a practical balance"



NOTE: *indicates n-size of less than 30.

Summary

Key Findings

1. Voters are MUCH more concerned about affordability than the environment.
   Elites are far ahead of the public and run the risk of getting too far ahead.

2. The issue is not the direction but the pace.
   Voters want governments to take action on climate. But they have limits on the price in terms of both direct and indirect costs that are willing to pay.

3. The Trudeau government is wearing out its welcome.
   There is no one thing driving time for a change in Ottawa. It also helps that the CPC are not scary voters away. Populism seems to be less scary than ideology.

4. The politics of energy may benefit the CPC.
   The CPC skepticism of the federal GHG agenda not only rallies the CPC base, but connects with large numbers of moderate voters.

5. Is Doug Ford Ontario's Teflon man?
   Ford has been losing ground, but he remains in the driver's seat. The Liberals and NDP continue to split the voter. Again, populism is likely playing a critical in allowing Ford to reverse course AND maintain his credibility.

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Building Understanding.

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