



the gandalf group

Public Opinion on Energy

Canadian Nuclear Association Conference and Trade Show
February 25, 2016



Today I will be using results from the following studies conducted by The Gandalf Group:

- Canadian Energy Efficiency Alliance; 2013
- Canadian Solar Industry Association (CanSIA); 2014
- Consumerology (in partnership with Bensimon Byrne); tracking data 2008-2015
- Ontario Energy Association; 2014
- Ontario Power Survey; 2016



Before we even consider the electricity sector and how consumers feel about rates we need to understand that Canadians have been living in a recession longer than economists.

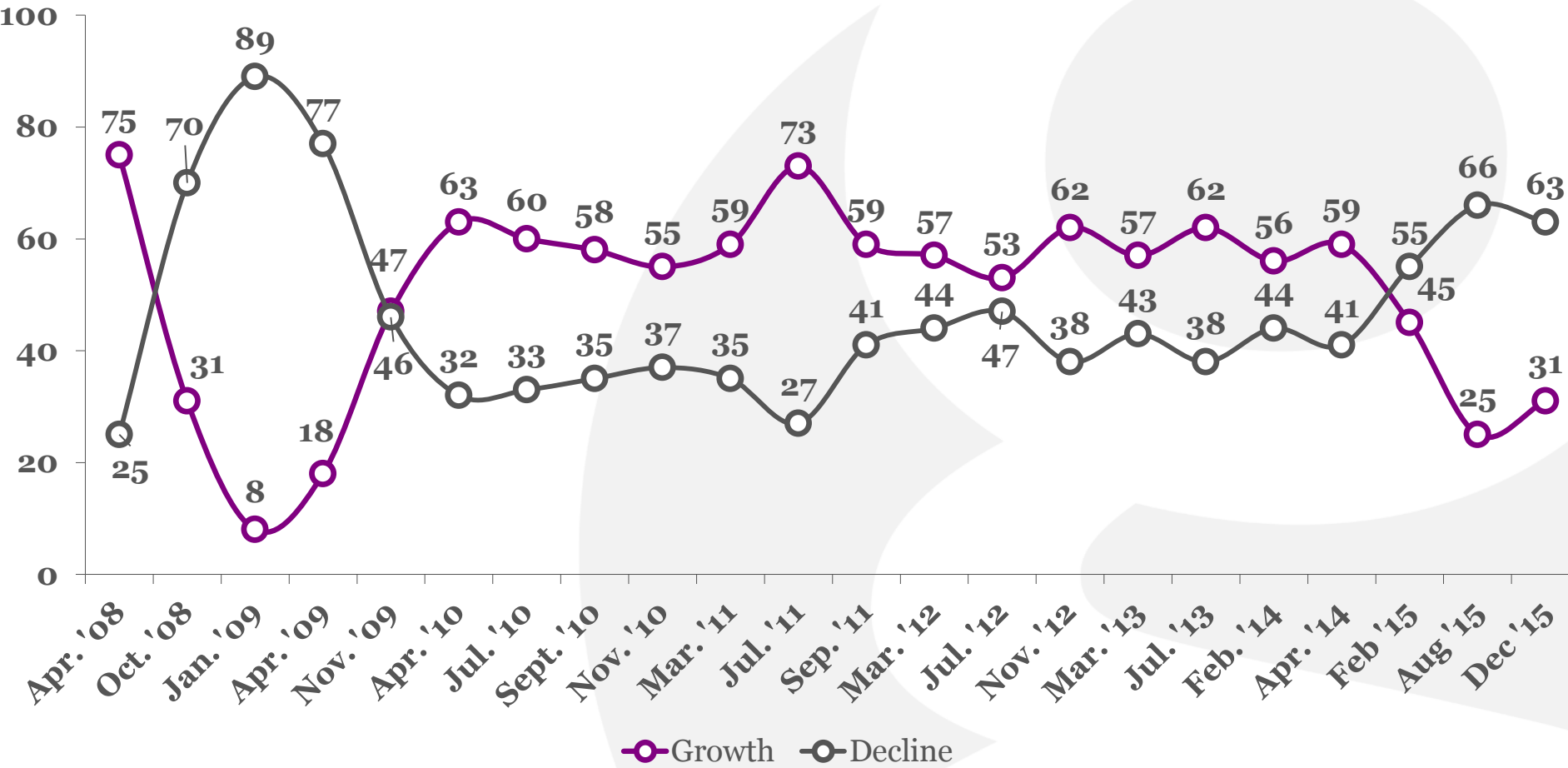
Rates are an increasingly major concern in Ontario. The cost of electricity is not just seen to be unreasonably high, it is widely seen as damaging to the provincial economy.

- Slowing rate increases is critical.
- Electricity is a necessity not a luxury.



Assessment of Canada's Economy

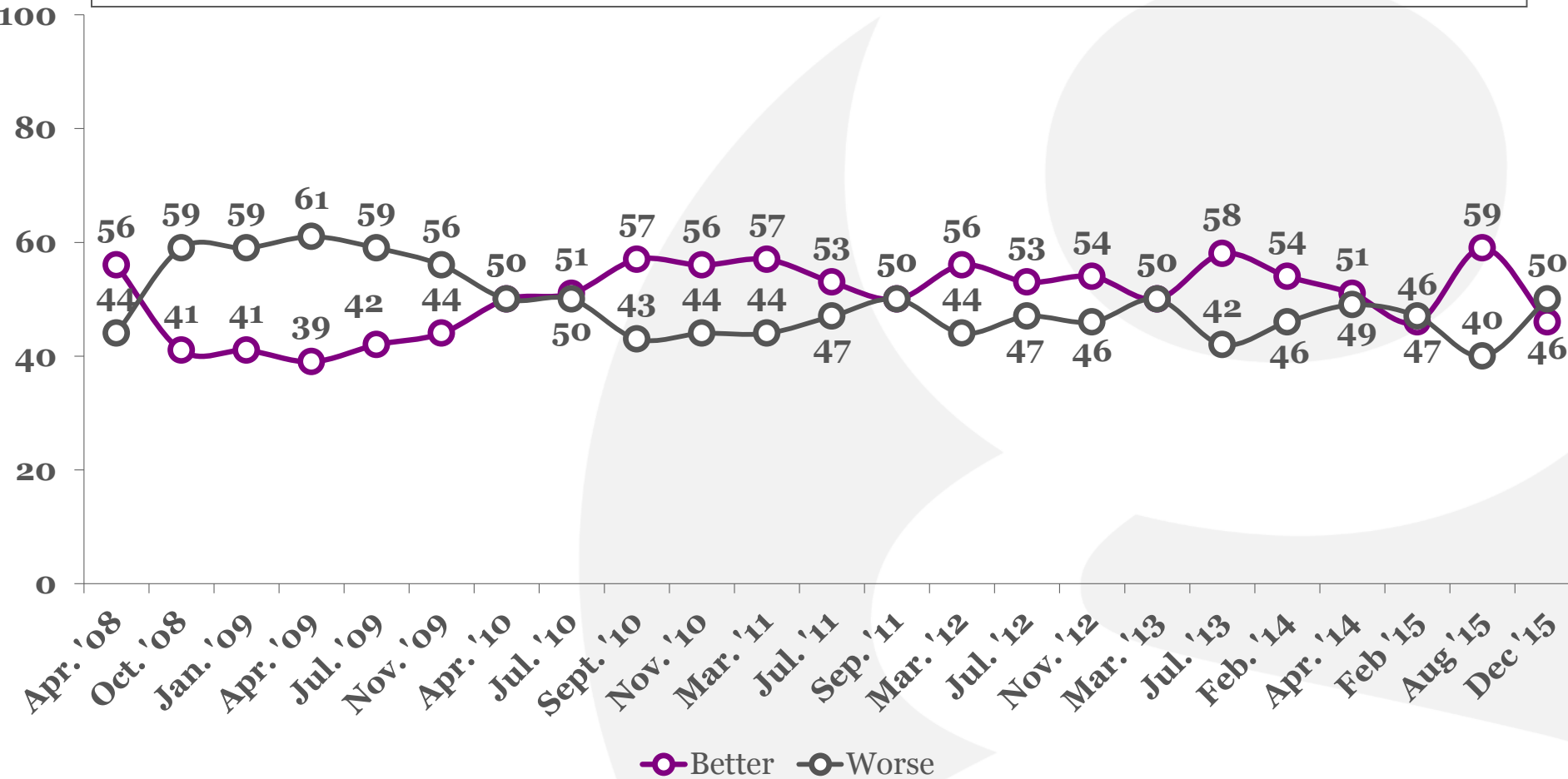
In general, how would you describe the state of the economy of Canada today – would you say that it is in a period of _____?





Assessment of Personal Financial Situation

How would you say your PERSONAL financial or economic situation is compared to one year ago?
Would you say your PERSONAL or economic financial situation has gotten _____?

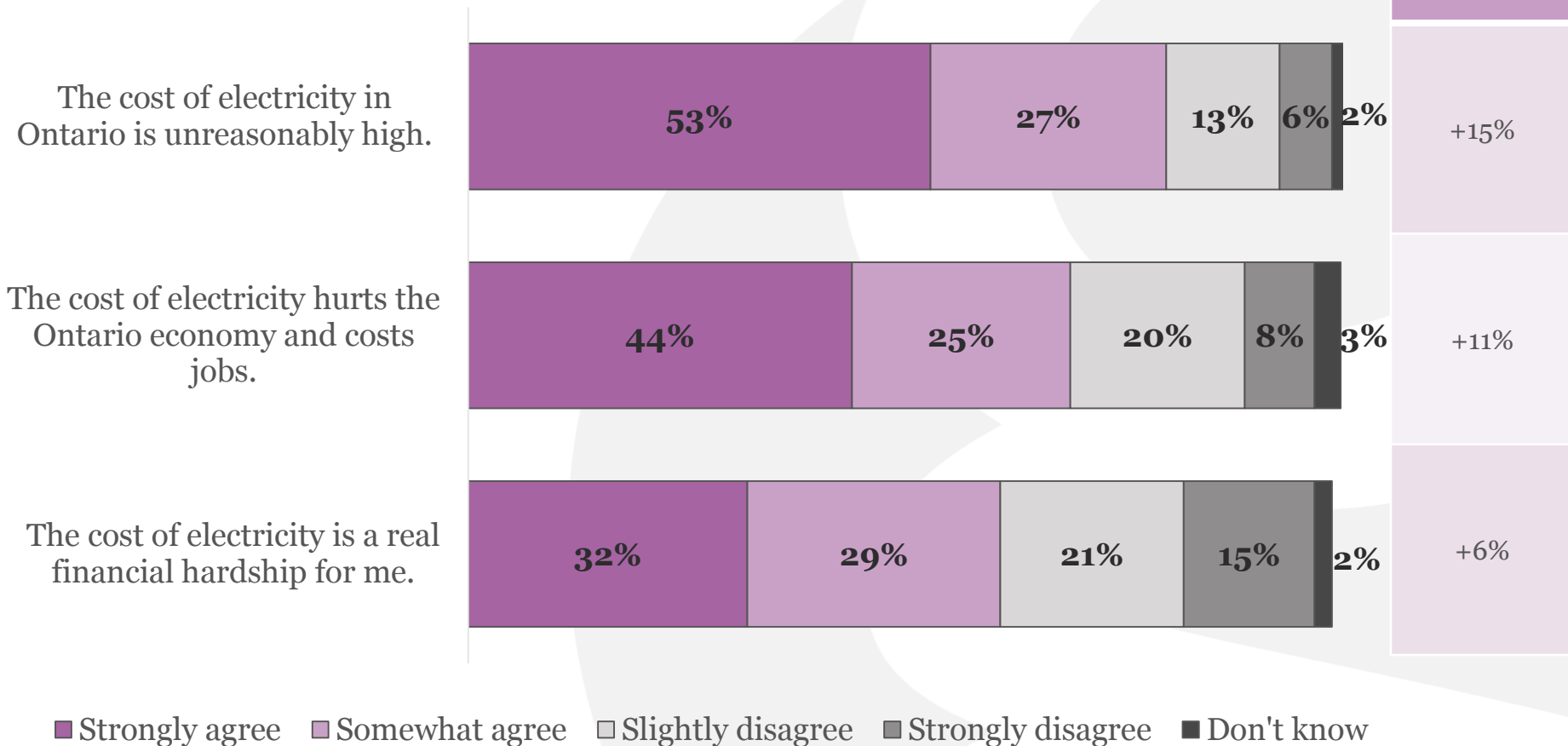




Electricity Rates in Ontario

I'm going to read some statements people might make about electricity in Ontario and ask if you strongly or somewhat agree or strongly or somewhat disagree with each.

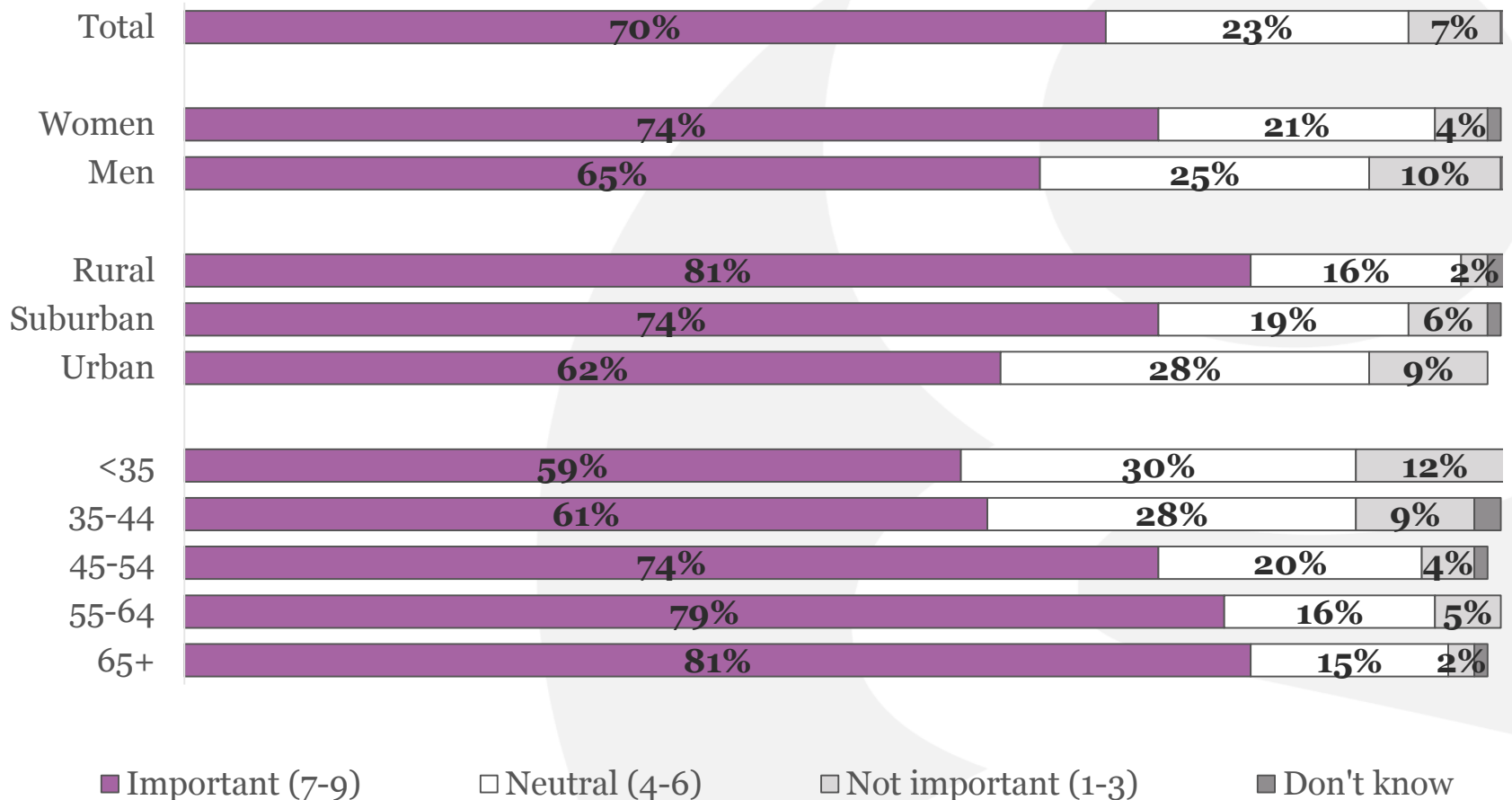
Change in str. agree since 2014





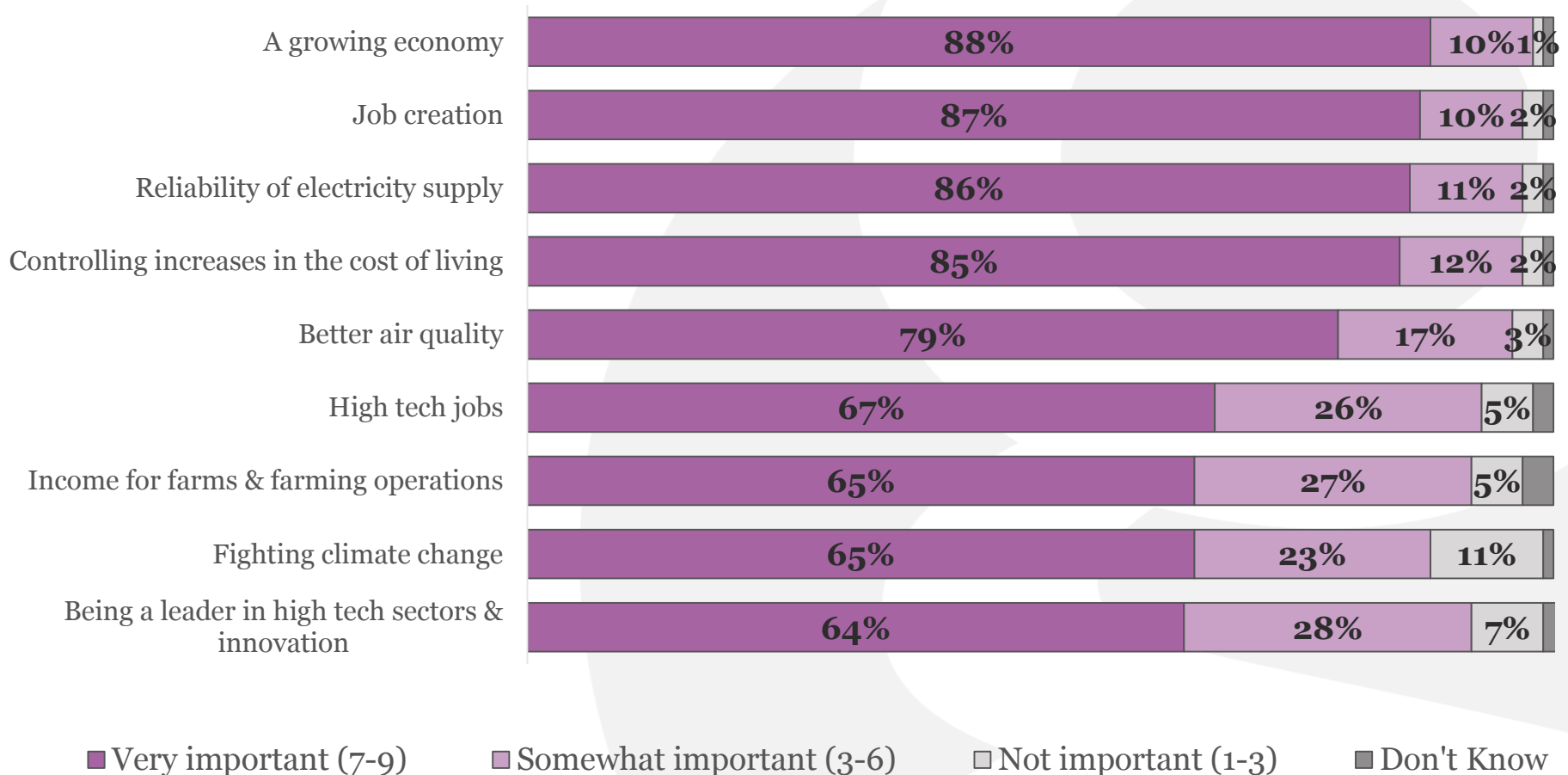
Importance of Slowing Rate Increases

The following is a list of possible priorities of the Government of Ontario. How important are each of the following to you? Please use a scale from one to nine where one means “not at all important” and nine means “very important”. **Slowing the rate at which electricity prices are going up**





Now please tell us how important in your view each of the following are to the people of Ontario, using a scale of one to nine.





Most Canadians are now living in economies that have some form of carbon pricing.

To say nothing of government commitments to reduce emissions, most Canadians are motivated to make personal changes to benefit the environment.

Clean water and air are top environmental concerns, above combating climate change.

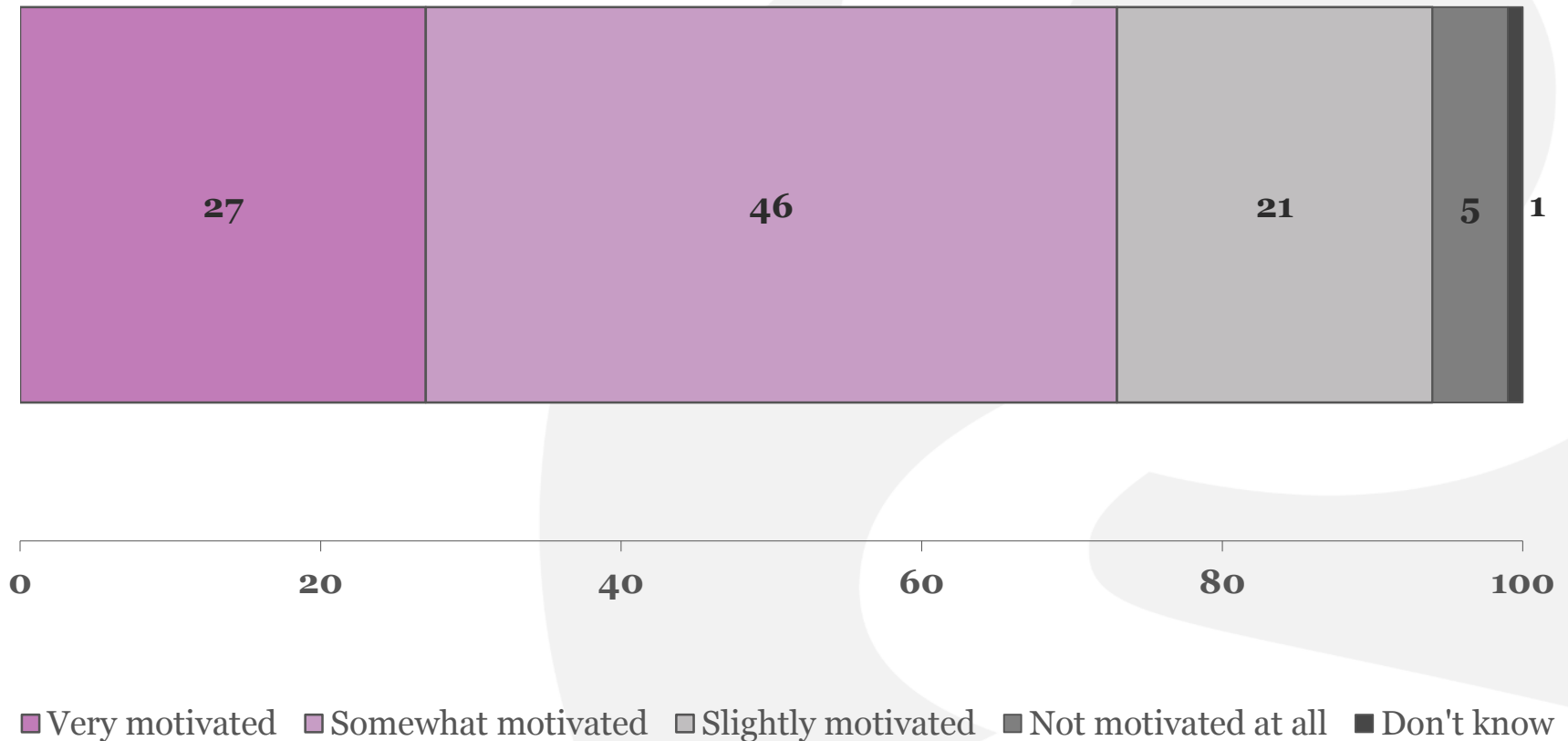
Most Ontarians feel it is important to move to greener sources of electricity.

Eliminating the use of fossil fuels by 2050 is an aspirational goal, especially for younger Ontarians.



Motivation to Benefit the Environment

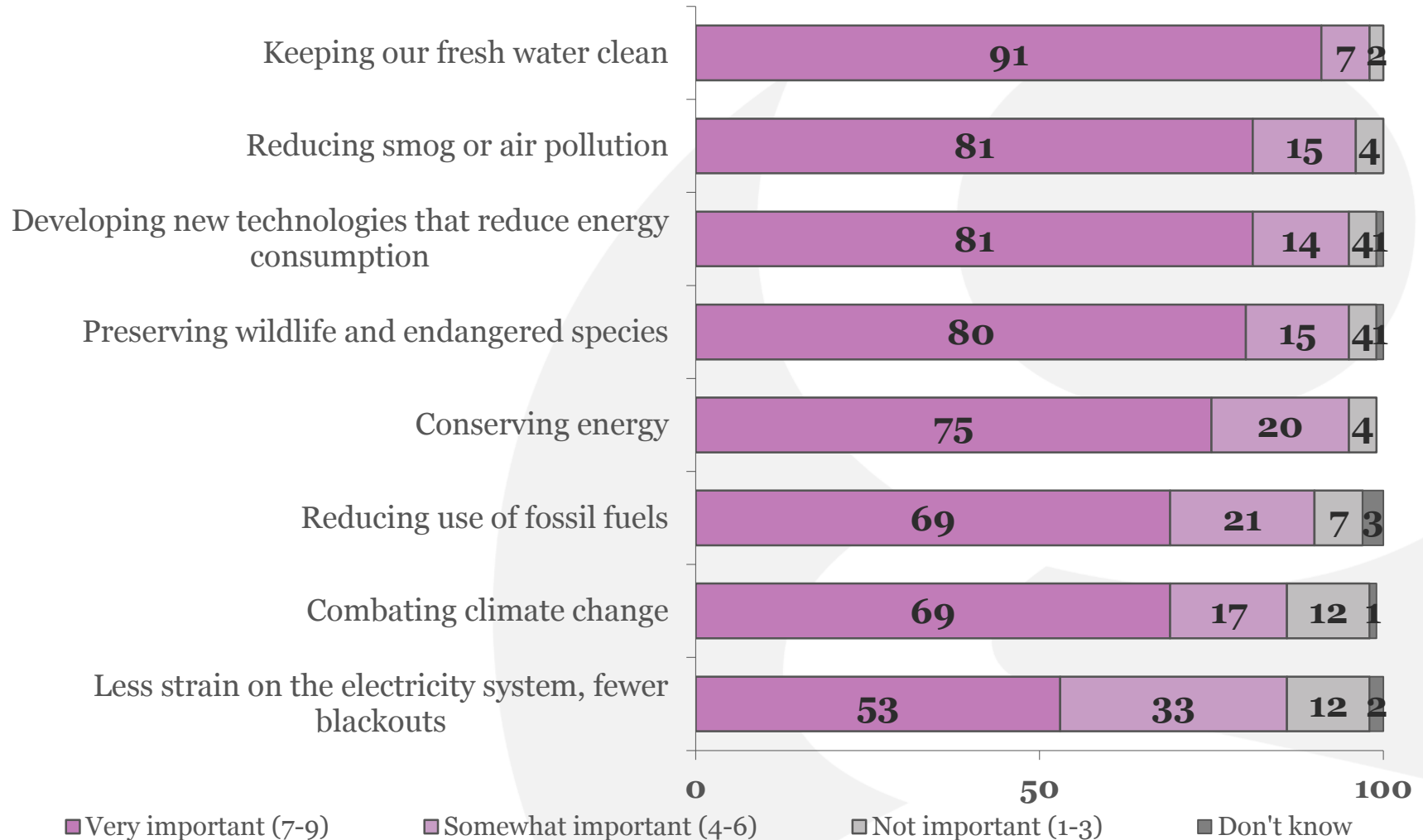
How strongly motivated are you to make personal changes in your life that would benefit the environment in some way?





Importance of Energy and Environmental Issues

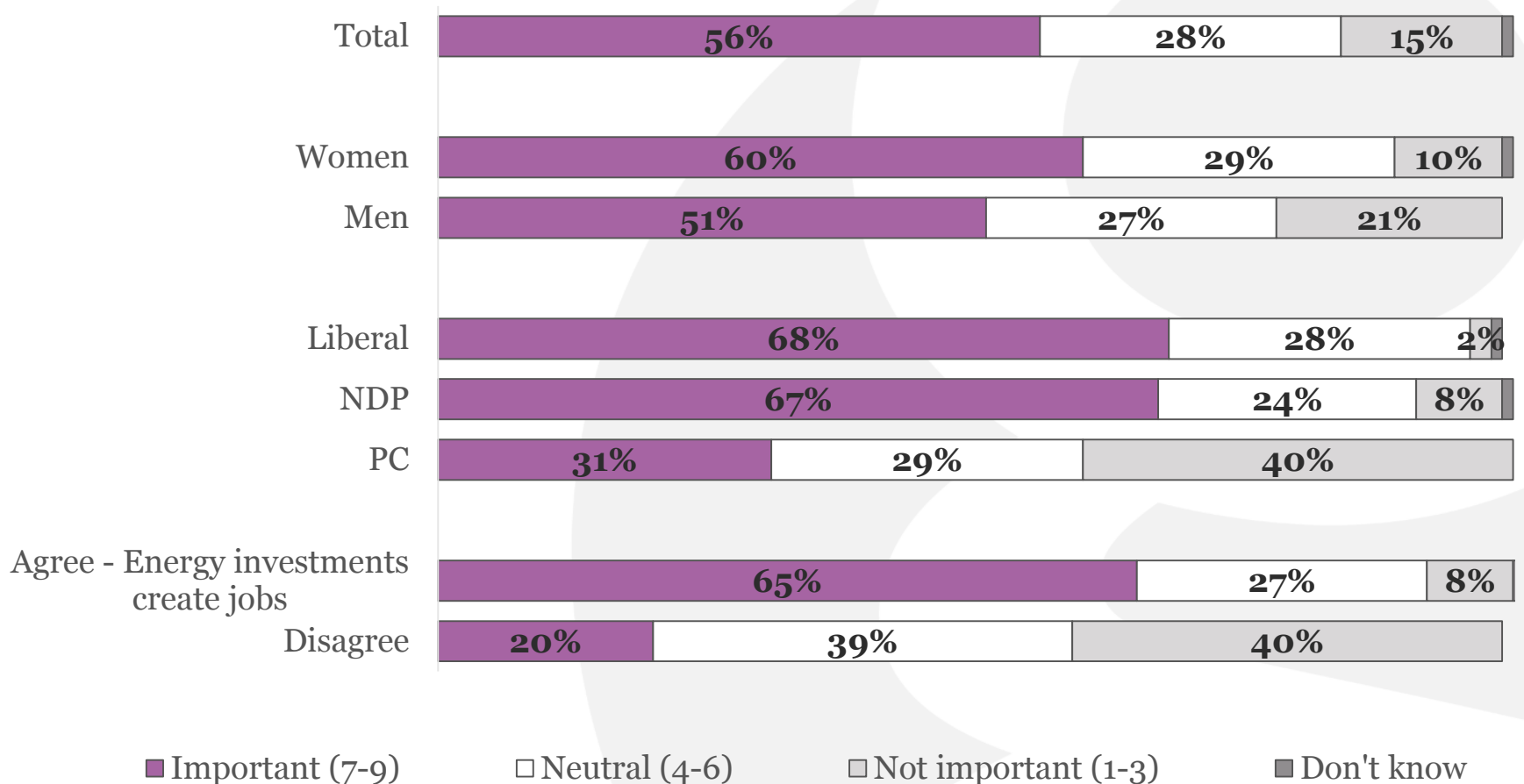
How important are each of the following energy and environmental issues to you personally?





Importance of More Environmentally-Friendly Sources of Electricity

The following is a list of possible priorities of the Government of Ontario. How important are each of the following to you? Please use a scale from one to nine where one means “not at all important” and nine means “very important”. **Moving to more environmentally-friendly sources of electricity**





Responsibility for rates fall primarily on the provincial government and regulators in Ontario, but local utilities and individuals are not far behind. Federal government is not off the hook either.

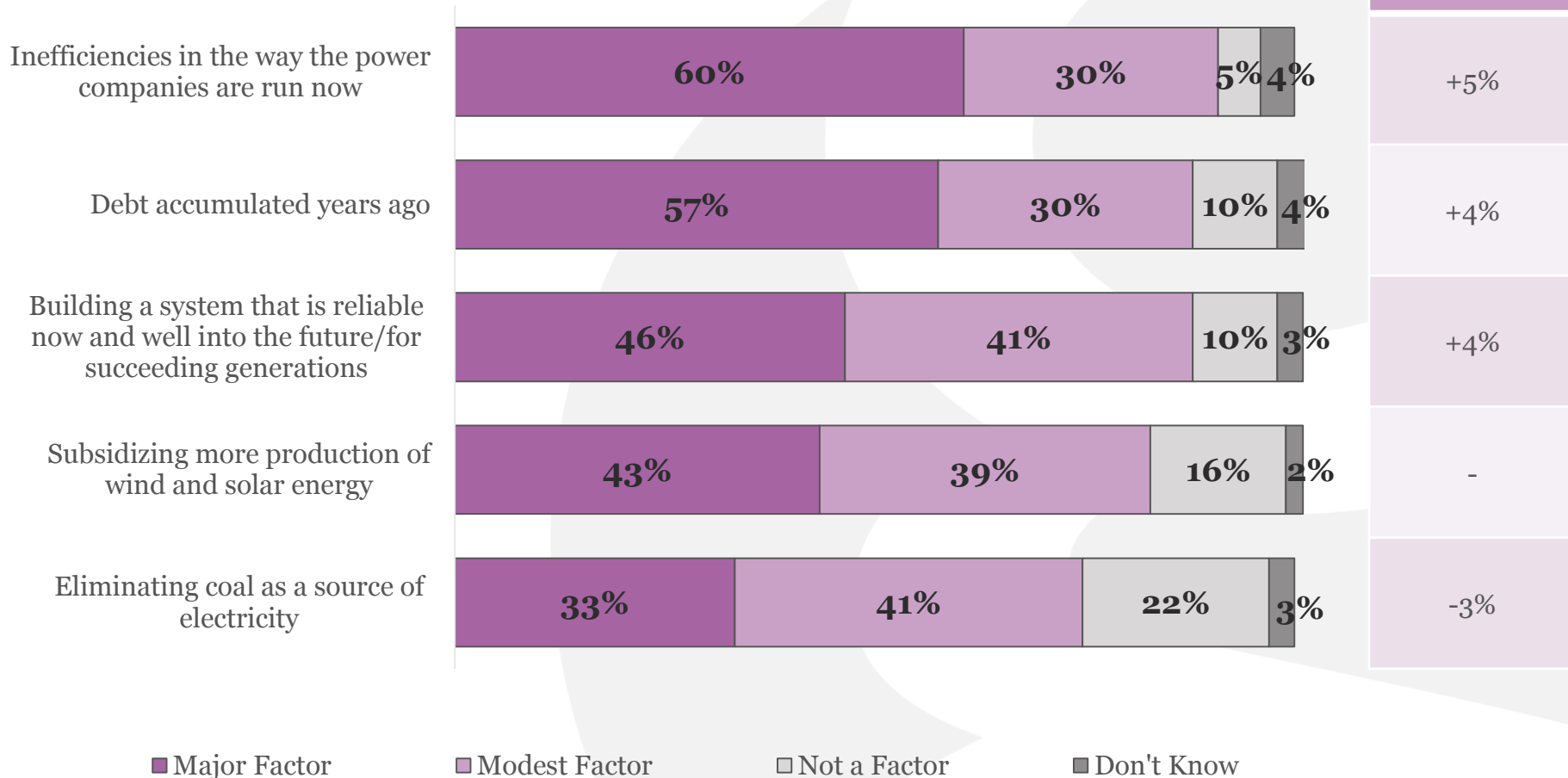
Ontarians think that poor decision making and poor management are primarily responsible for high electricity rates.

Fewer than one half think rates are being driven by investments in reliability, and only a third think eliminating coal is a major factor. Whatever the true costs of these positive investments, these statements are not resonating.

Eliminating coal is however a big part of the environmental story, in Ontario.



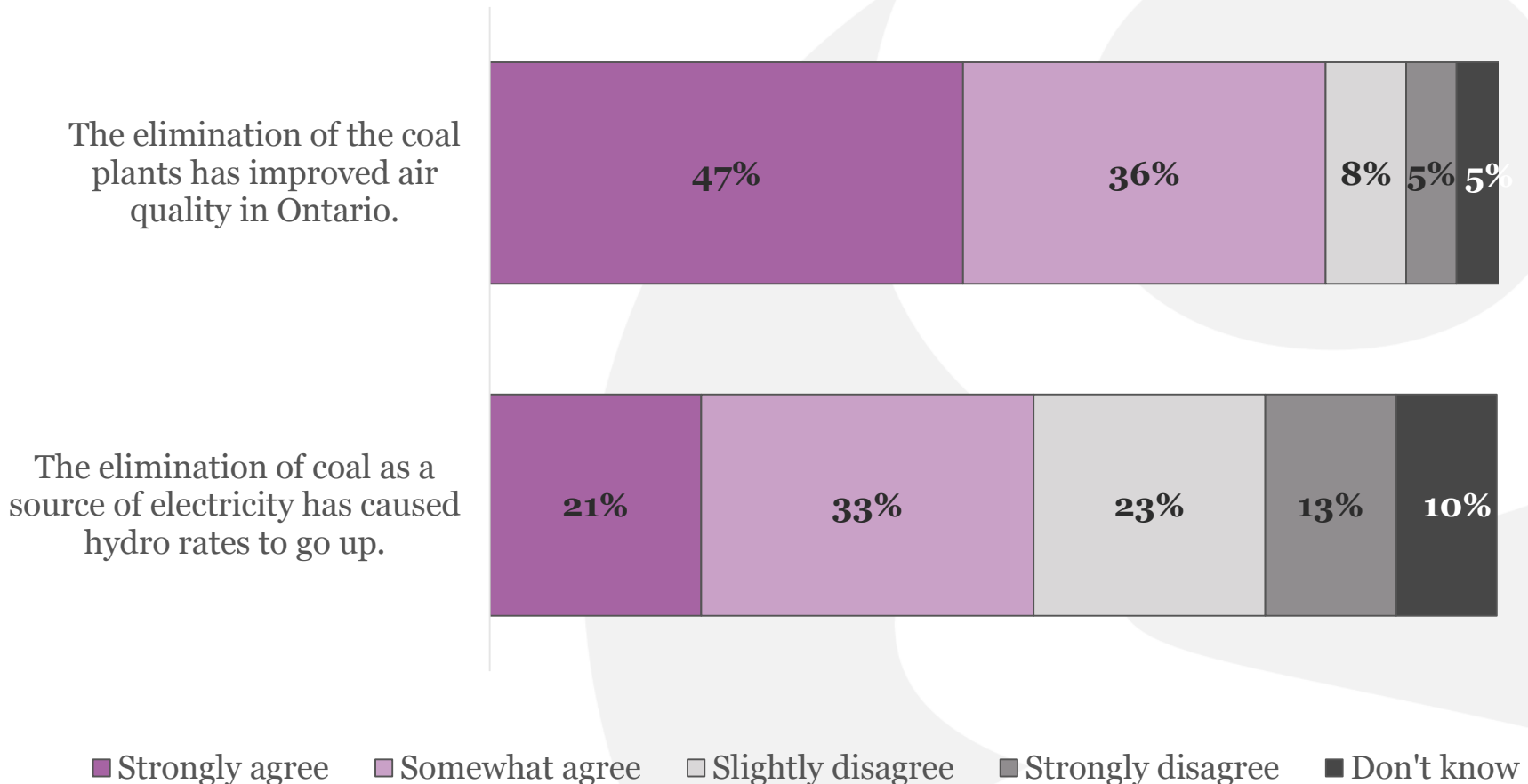
How big a factor do you think each is in driving electricity costs in Ontario?





Statements about Ontario Electricity

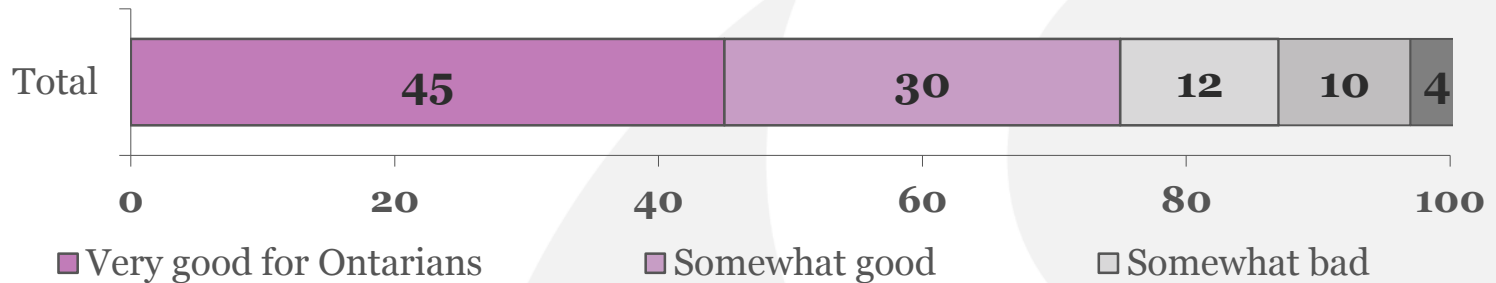
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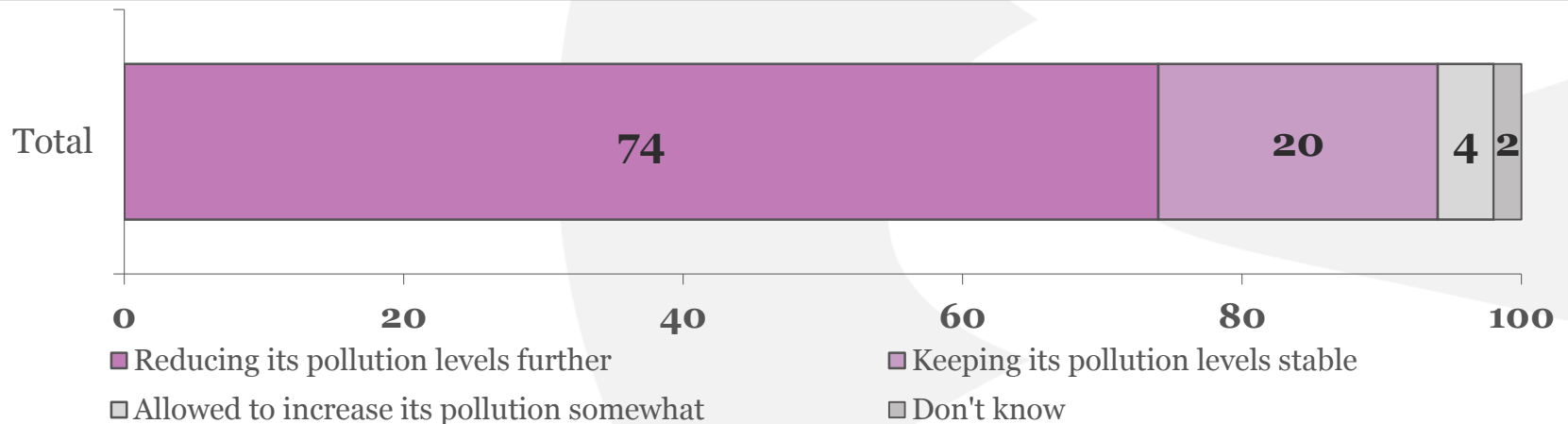


End of Coal & Continuing to Reduce Pollution

Over the last five years Ontario has shut down coal fired generation electricity power plants and increased reliance on other sources of electricity including investments in new solar power energy. Would you say this has been:...



Ontario has made a lot of progress reducing greenhouse gas emissions from its electricity sector by shutting down coal fired electricity generation plants and relying on other sources of electricity. Given this, looking out over the next ten years do...





Three quarters of Ontarians support using nuclear energy to produce electricity.

There is a very large gender gap on support for nuclear energy.

- Men are more than twice as likely to be strongly supportive than women.
- Women are now more likely to strongly support than to be strongly opposed.

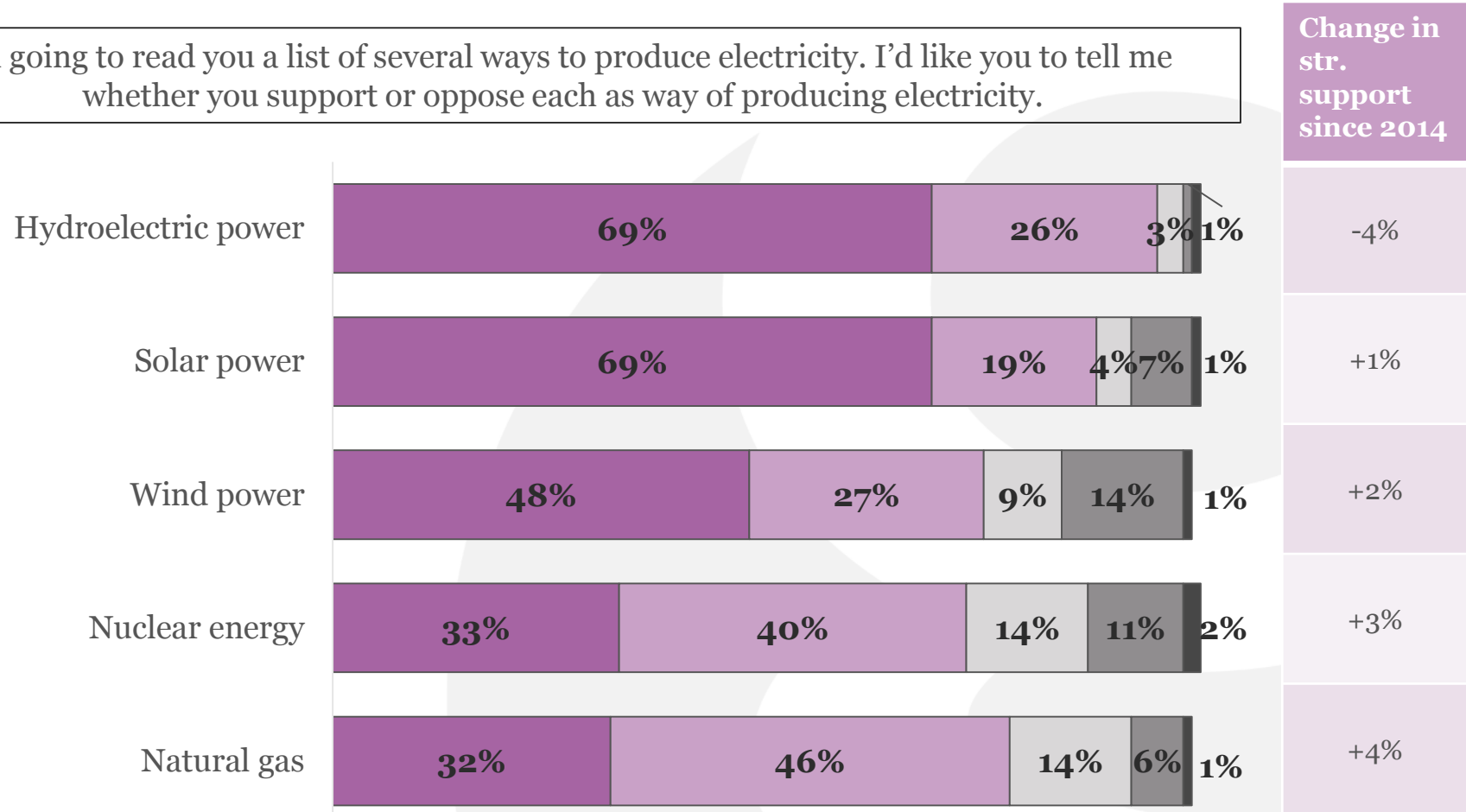
Nuclear energy is seen to be superior to or equal to other forms of production on all measures tested.

- Environment is the strongest area for nuclear, while safety and rates are weakest.



Producing Electricity

I'm going to read you a list of several ways to produce electricity. I'd like you to tell me whether you support or oppose each as way of producing electricity.



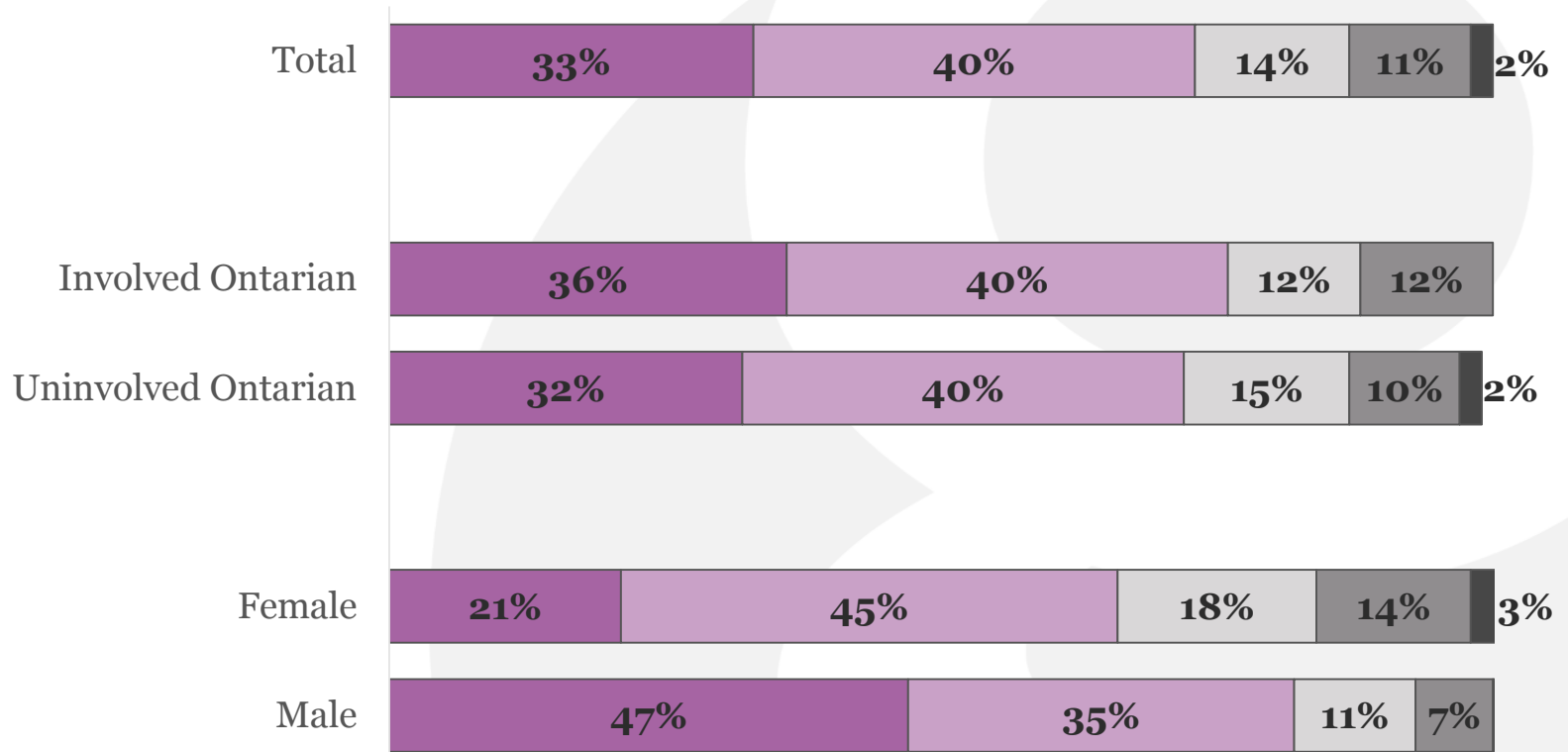
■ Strongly support ■ Somewhat support □ Somewhat oppose ■ Strongly oppose ■ Don't know



Producing Electricity

I'm going to read you a list of several ways to produce electricity. I'd like you to tell me whether you support or oppose each as way of producing electricity.

[Nuclear Energy]

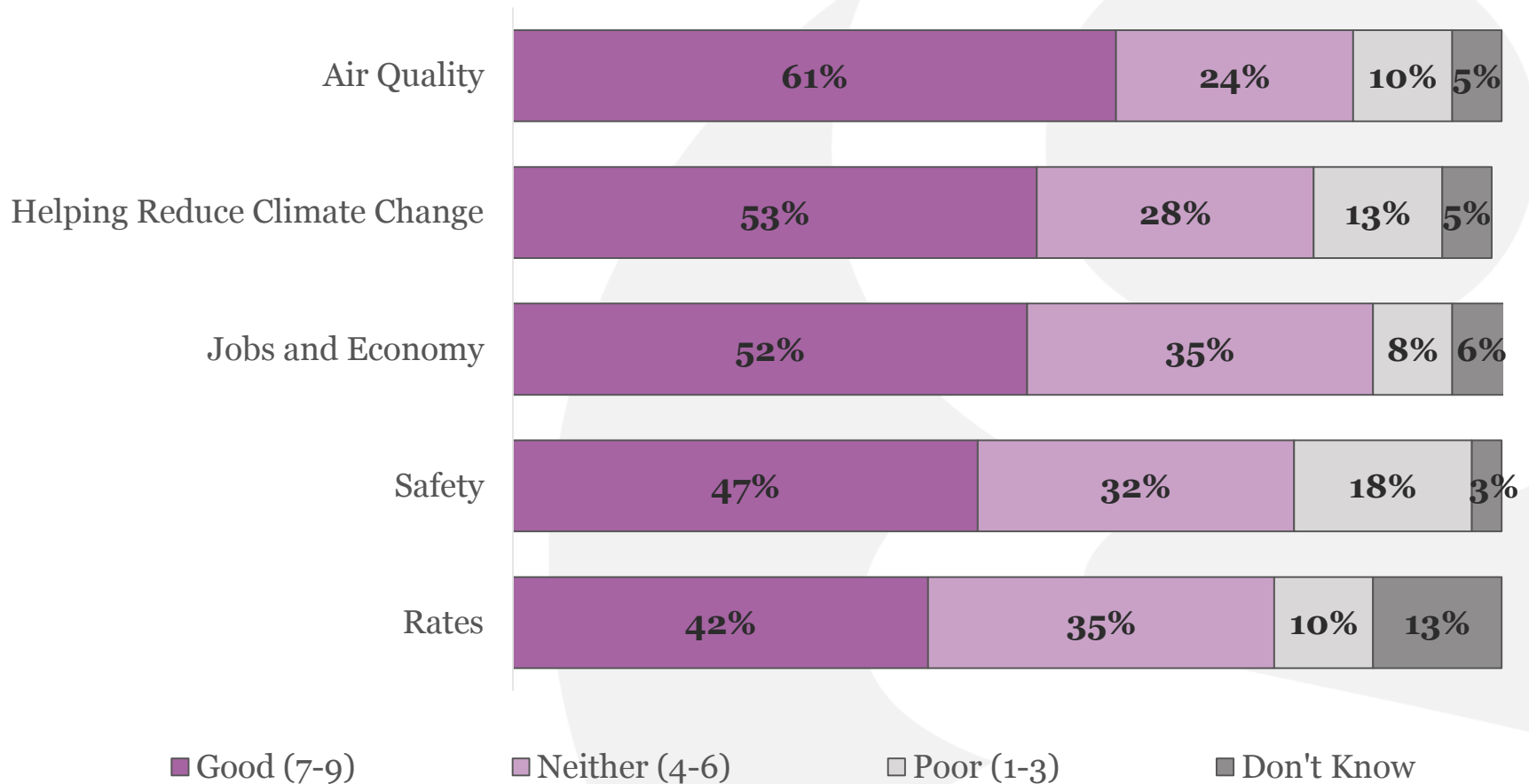


■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose ■ Don't know



Nuclear Energy vs. Other Energy

On a scale of one to nine where one is very poor and nine is very good, how would you rate nuclear energy compared to other forms of electricity generation on each of the following:





Ontarians overwhelmingly (70%) feel that it is acceptable if we are still using nuclear energy in 30 years.

- Men are more than twice as likely to say this is very acceptable (54%), as women (25%).

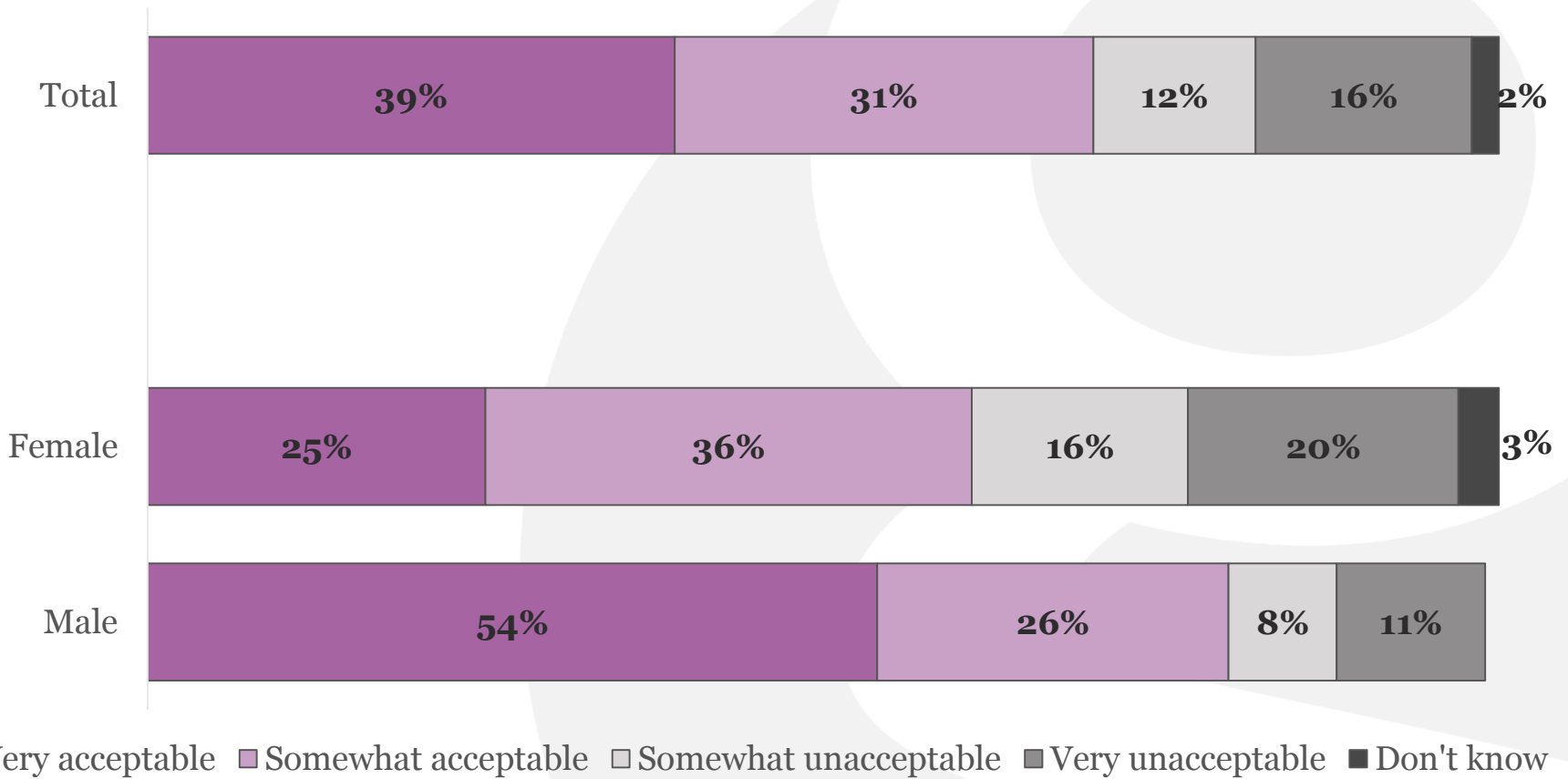
It is much less acceptable (42%) if we were still using oil and gas in 30 years.

- Those younger than 55 are more likely to say this is unacceptable than acceptable.
- Indeed Ontarians under 35 are twice as likely to say this is unacceptable than to say it is acceptable, while Ontarians 55+ are evenly split.



Nuclear Energy in 30 Years

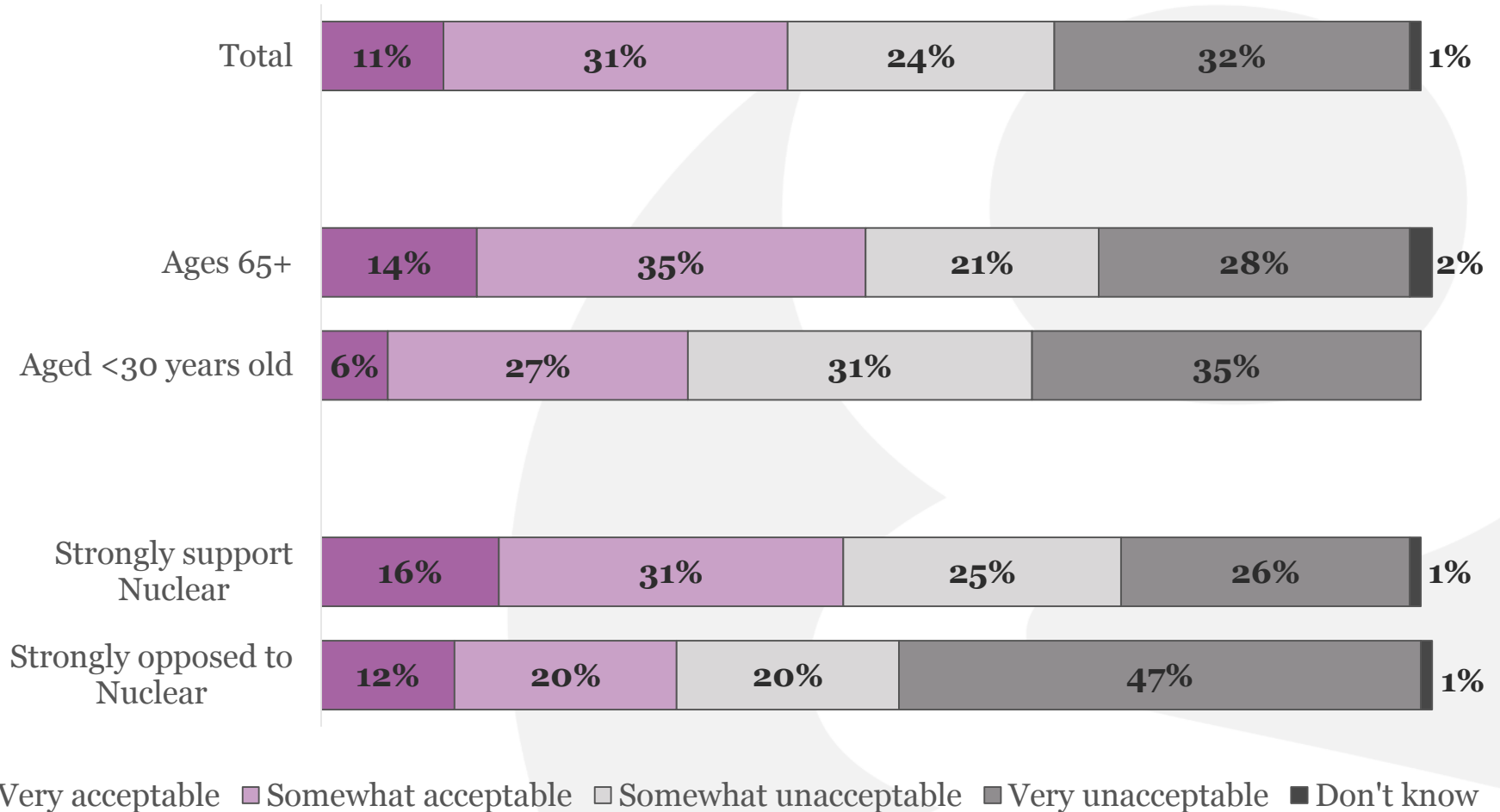
Today, about 60 per cent of Ontario's power comes from nuclear generation. If we are still using nuclear energy in 30 years, is that acceptable or unacceptable?





Oil & Gas in 30 Years

If we are still using oil and gas in 30 years, is that acceptable or unacceptable?





Nuclear Energy Has an Economic Story to Tell

Virtually all agree that energy investments create good jobs in Ontario.

Three quarters agree that Ontario has expertise in nuclear technology.

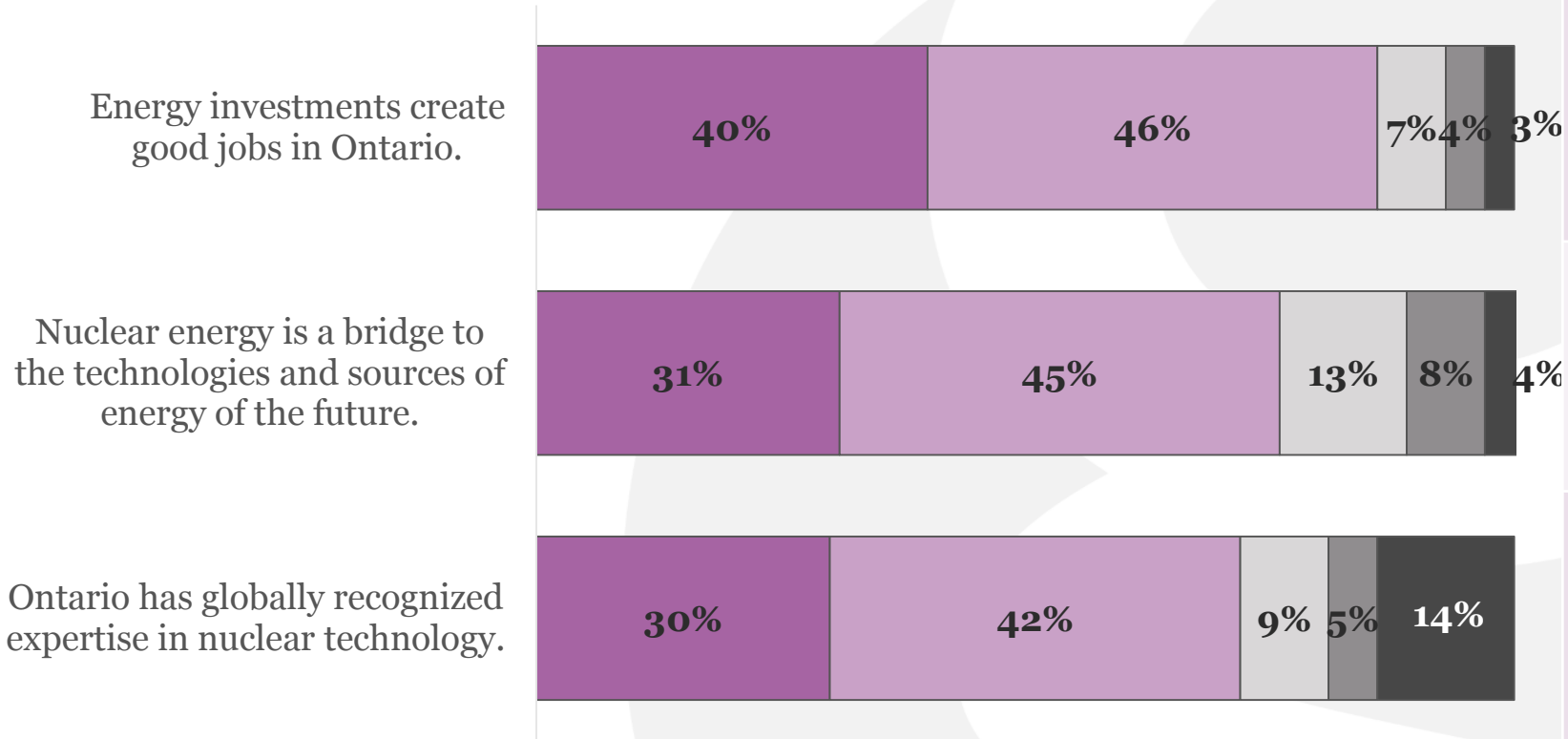
Three quarters agree that nuclear energy is a bridge to the technologies and source of energy of the future.



Statements about Ontario Electricity

I'm going to read some statements people might make about electricity in Ontario and ask if you strongly or somewhat agree or strongly or somewhat disagree with each.

Change in str. agree since 2014
+1%
N/A
-2%



■ Strongly agree ■ Somewhat agree □ Slightly disagree ■ Strongly disagree ■ Don't know



Public anxiety about electricity rates in Ontario is the most important current driver of attitudes toward the electricity sector.

Nationally, concerns about the economy, both in the immediate and in the long term, are dwarfing other issues.

Nuclear support is historically high, and opposition is very low.

It is important to associate nuclear with the energy sources and the economy of the future, not the past.

There are three narrative streams that the nuclear industry can align itself with:

- Affordability
- Clean air/climate change
- Building the economy

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THANK YOU



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