



the gandalf group

CanSIA: Ontario Survey

May 19, 2015



- This survey of Ontarians about solar energy, technology and policies fielded:
 - Between May 1 and May 8th, 2015.
 - With 837 adult Ontarians.
 - Using a randomly-recruited, non-opt-in online panel that supports probability sampling.
 - Margin of error: +/- 3.39%, 19/20
 - Targets were used and final data was weighted to reflect the population with respect to age, region and gender proportionate to provincial statistics.

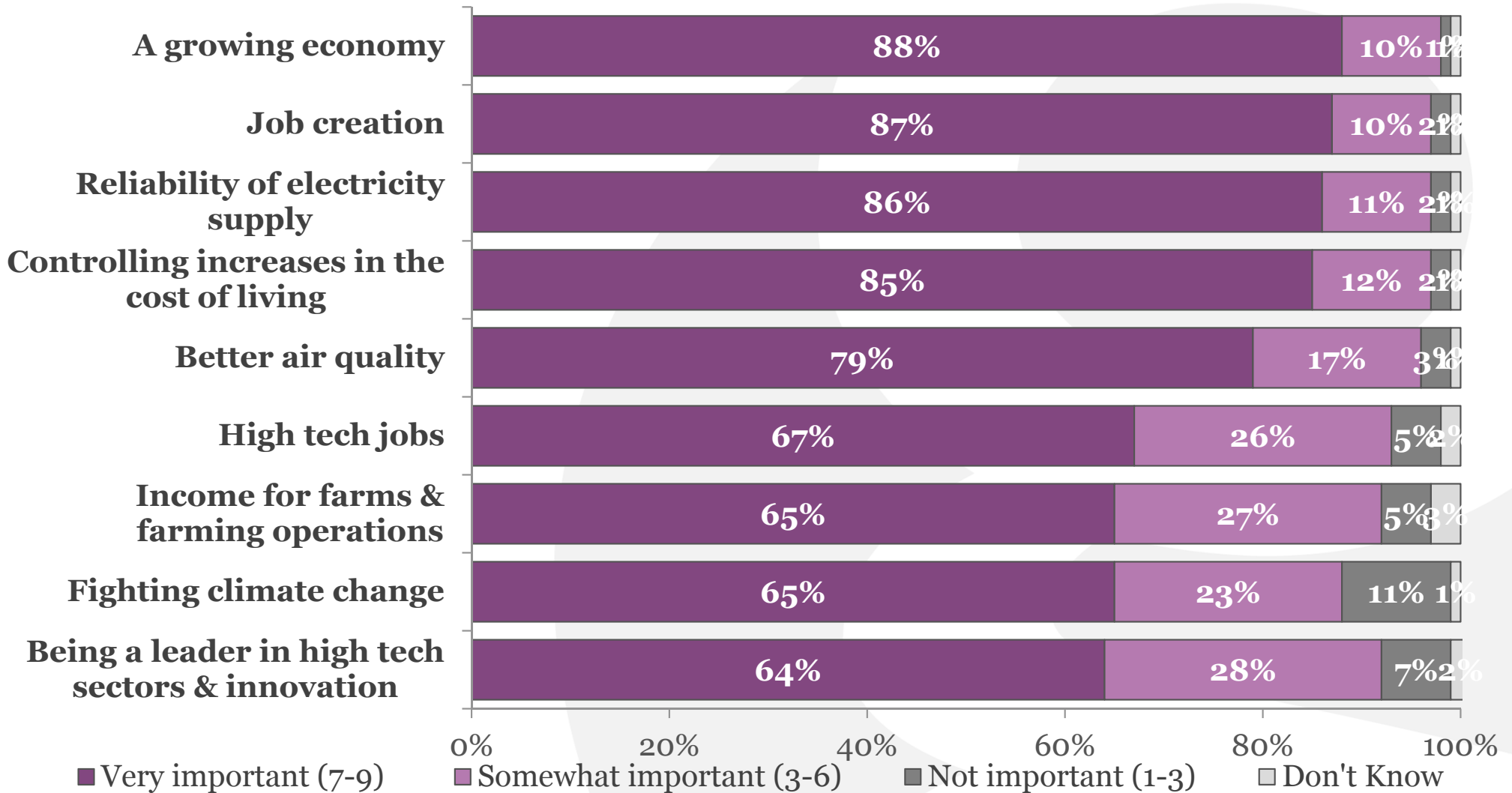


- ❑ Many Ontarians feel Ontario's economy is not performing well.
- ❑ The outlook is especially pessimistic outside of Toronto.
- ❑ Unsurprisingly, the economy and job creation are top of mind issues or concerns for Ontarians.
- ❑ But so too is reliable electricity supply and the rising cost of living.
- ❑ For most Ontarians, climate change and air quality are fairly important. But for supporters of the government they are very important. Liberal voters are also more likely to support jobs in high-tech sectors.
- ❑ And most Ontarians think substantial reductions in air pollution are no reason stop continued efforts to reduce pollution further or simply keep pollution rates stable.



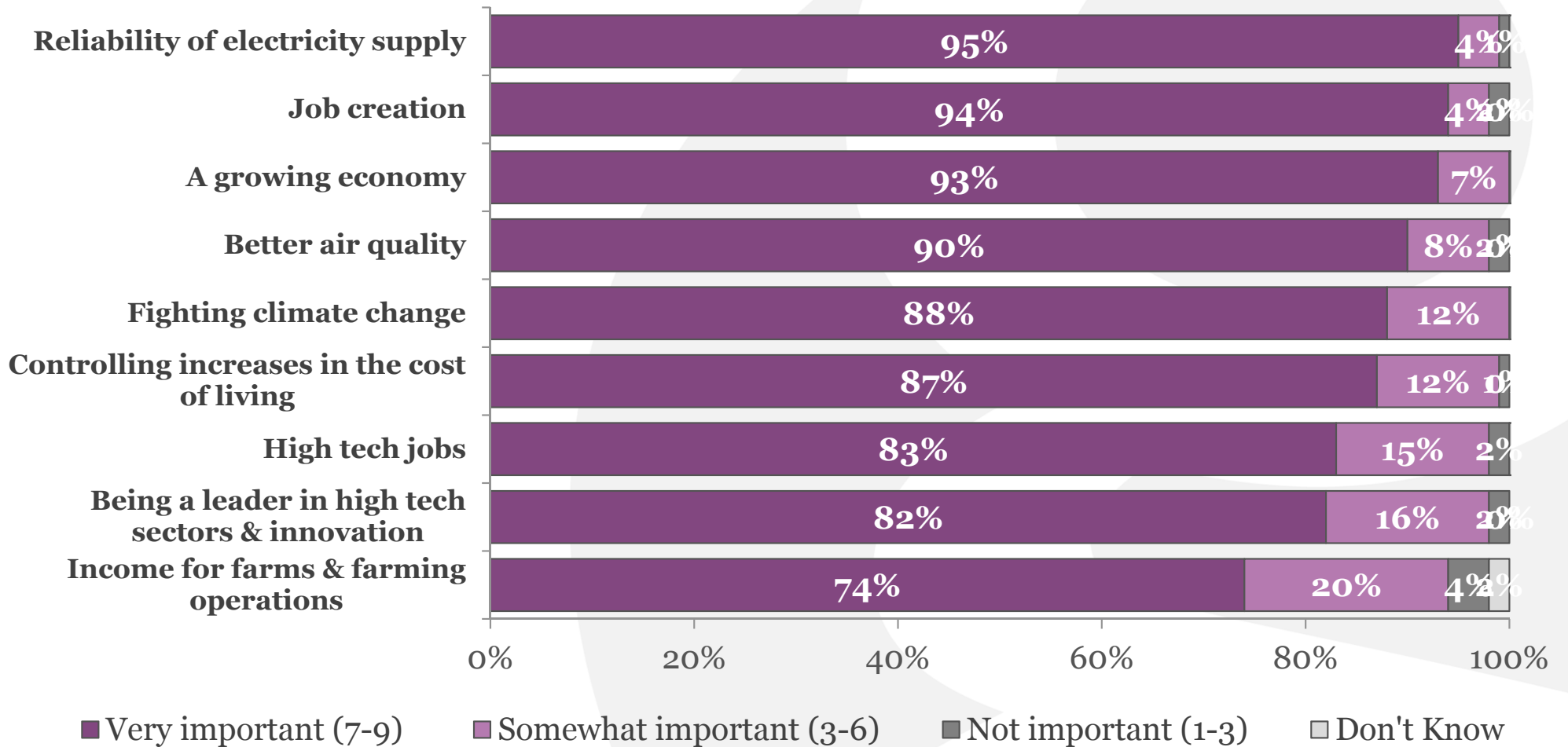
Issue Importance

“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.” **Total Sample**





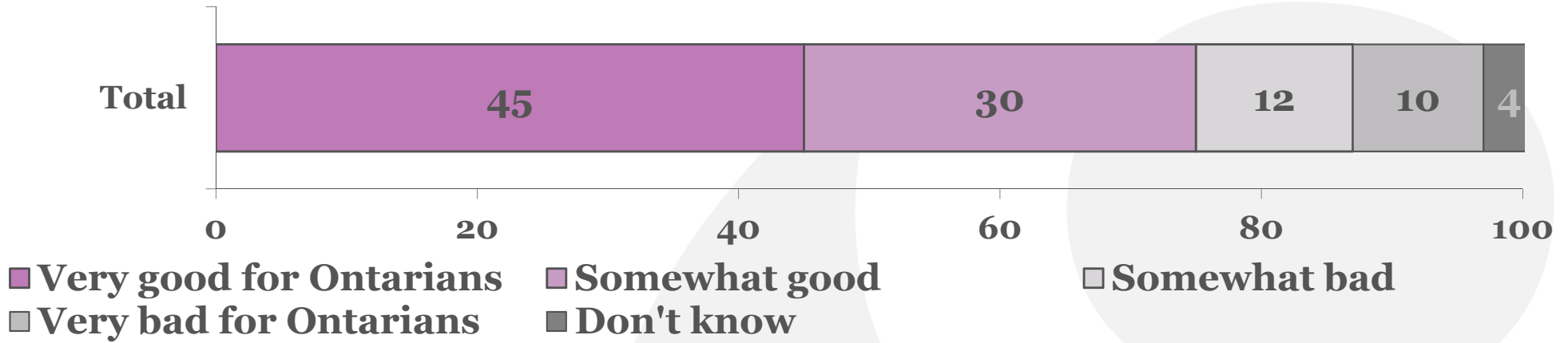
“Now please tell us how important in your view each of the following are to the people of Ontario, using a scale of one to nine.” **Among Ontario Liberal Voters**



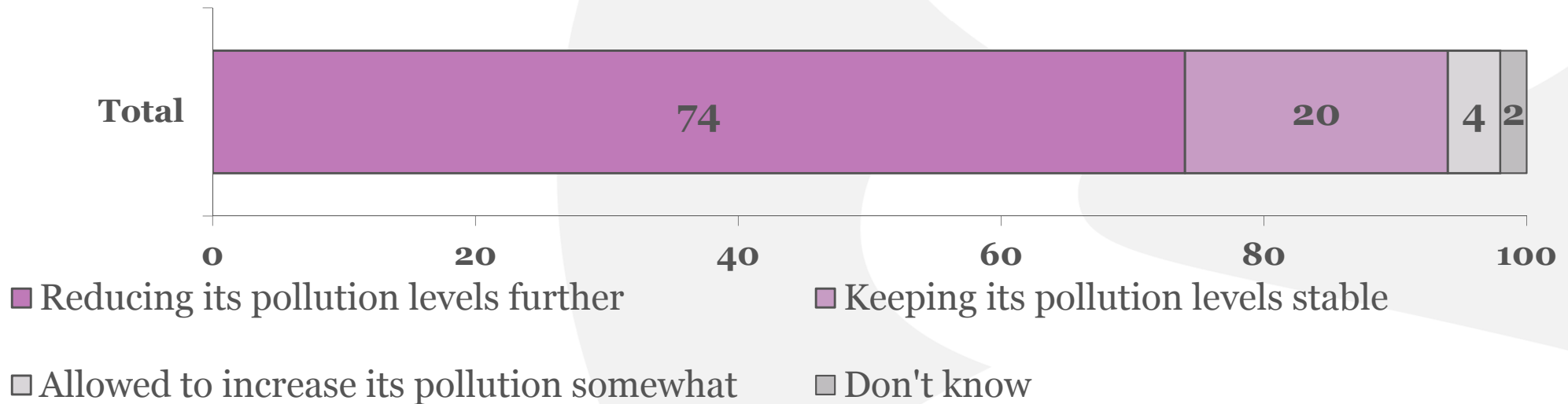


End of Coal & Continuing to Reduce Pollution

“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...”



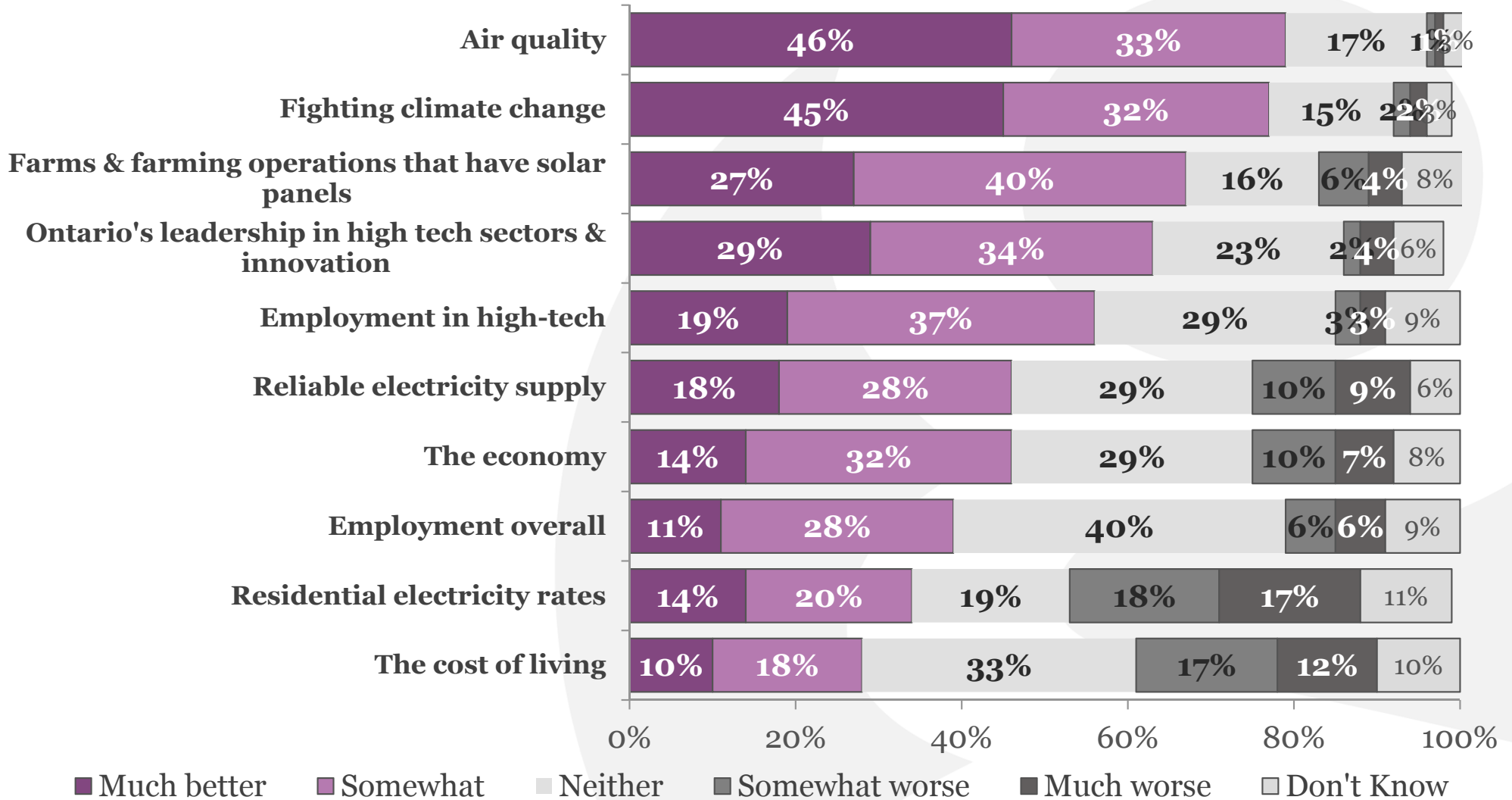


How Solar Meets Key Objectives

- ❑ Ontarians are especially likely to relate increased reliance on solar to better air quality and fighting climate change.
- ❑ A secondary benefit would be Ontario's standing as a high-tech leader and to some extent job creation in high-tech sectors – most believe those things will benefit.
- ❑ Just under half think the province's need for reliability in its supply of electricity will be enhanced by solar. Nearly one in five say Ontario will be worse off in this respect.
- ❑ Where Ontarians are less certain is on the cost of electricity.
 - 28% said solar would be a good thing for electricity rates, 29% said it rates would be worse. Others are uncertain.
 - Less than half agreed that solar is nearly competitive on cost with other sources – many disagreed or don't know.

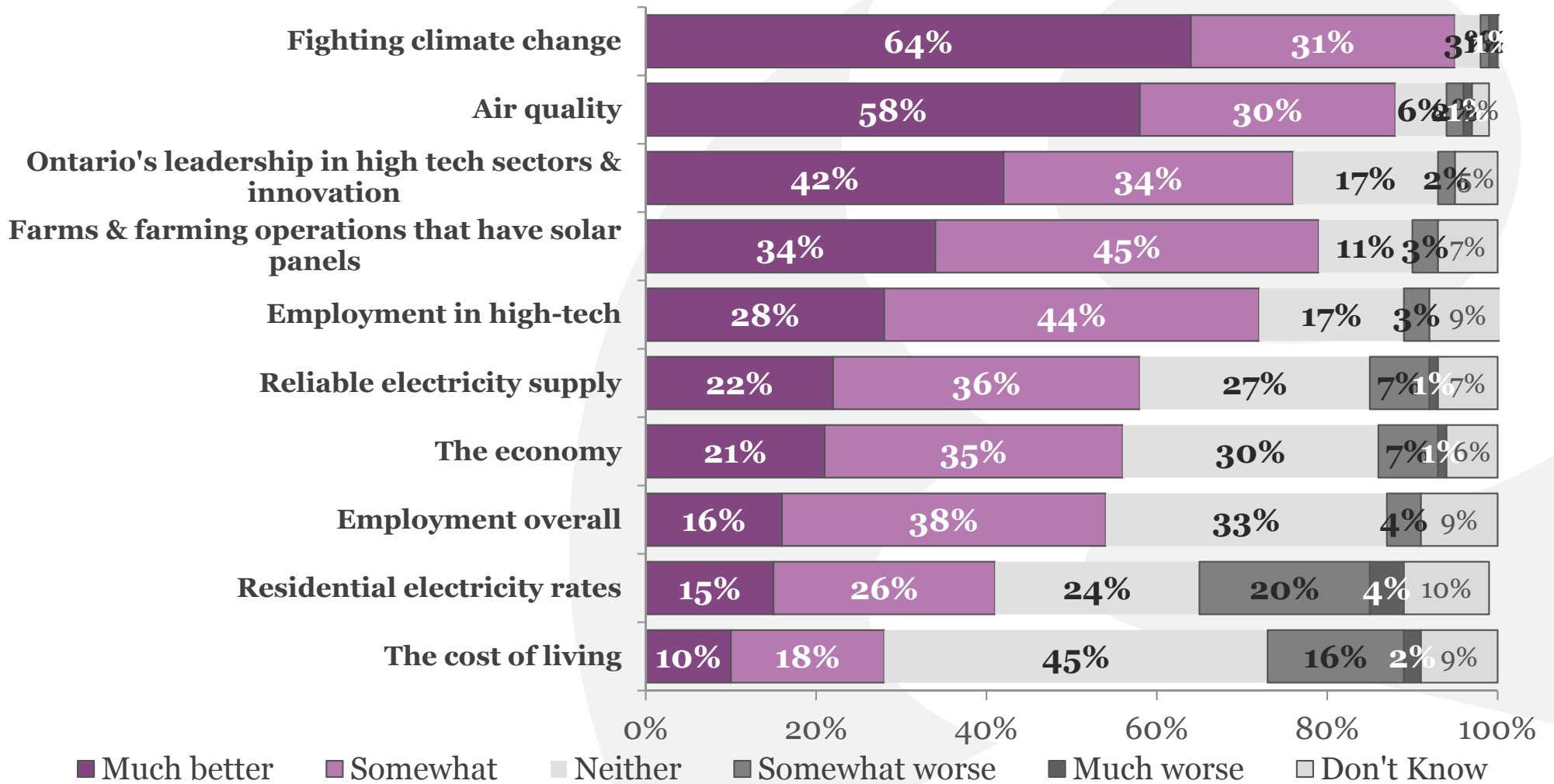


“If the provincial government increases the amount of electricity generated by solar energy, would that be better or worse in your view for each of the following things in Ontario or neither better nor worse?”





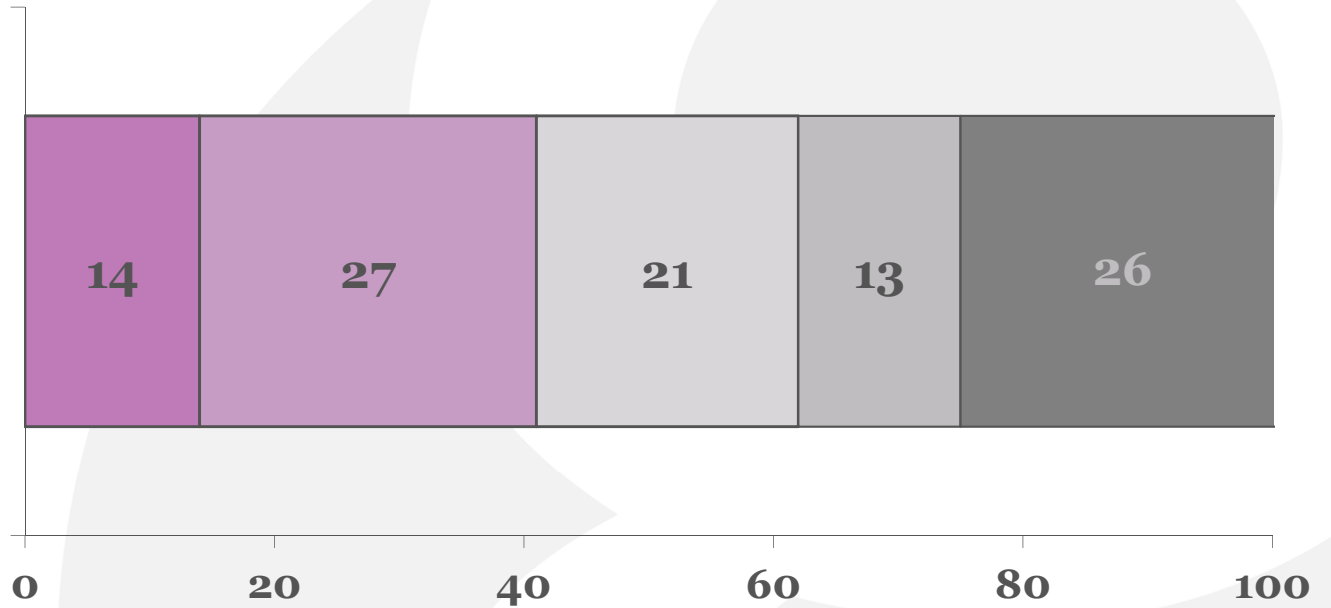
“If the provincial government increases the amount of electricity generated by solar energy, would that be better or worse in your view for each of the following things in Ontario or neither better nor worse?”
Among Ontario Liberals





“Please tell us whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.” % saying each

The cost of solar technology has declined to the point where solar is nearly cost competitive to other ways of generating electricity



■ Strongly agree

■ Somewhat agree

■ Somewhat disagree

■ Strongly disagree

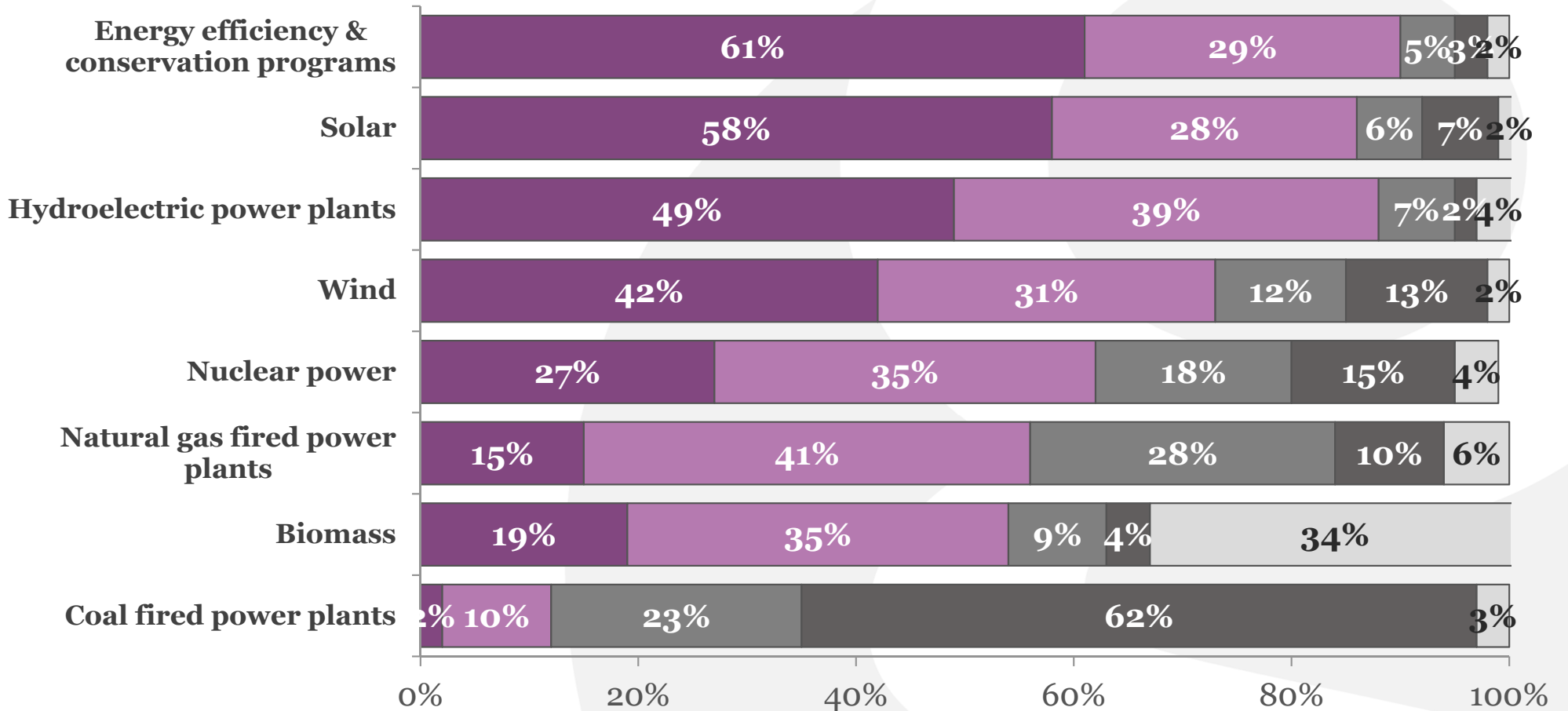
■ Don't know



- Given the many benefits Ontarians believe would be delivered by solar, it's not surprising that the vast majority are supportive of increasing use of this energy source.
 - There is very low opposition to the “increased use” of solar “to meet the future needs of Ontario.”
 - Support is higher among middle-aged and younger residents, women and in Toronto.
 - Support is higher among Liberal and NDP voters than among PC voters - however even among the latter most favour increased use of solar going forward.
 - Ontarians are more likely to favour solar panels on rooftops in urban areas (89%) than panels on fields in rural areas (79%) but most favour both options.
 - Rural Ontarians are more supportive of solar panels in rural areas (84%) than Ontarians elsewhere.



“The following are ways of providing electricity for Ontario. Please indicate whether you strongly favour, somewhat favour, somewhat oppose or strongly oppose the increased use of each method to meet the future needs of Ontario?”

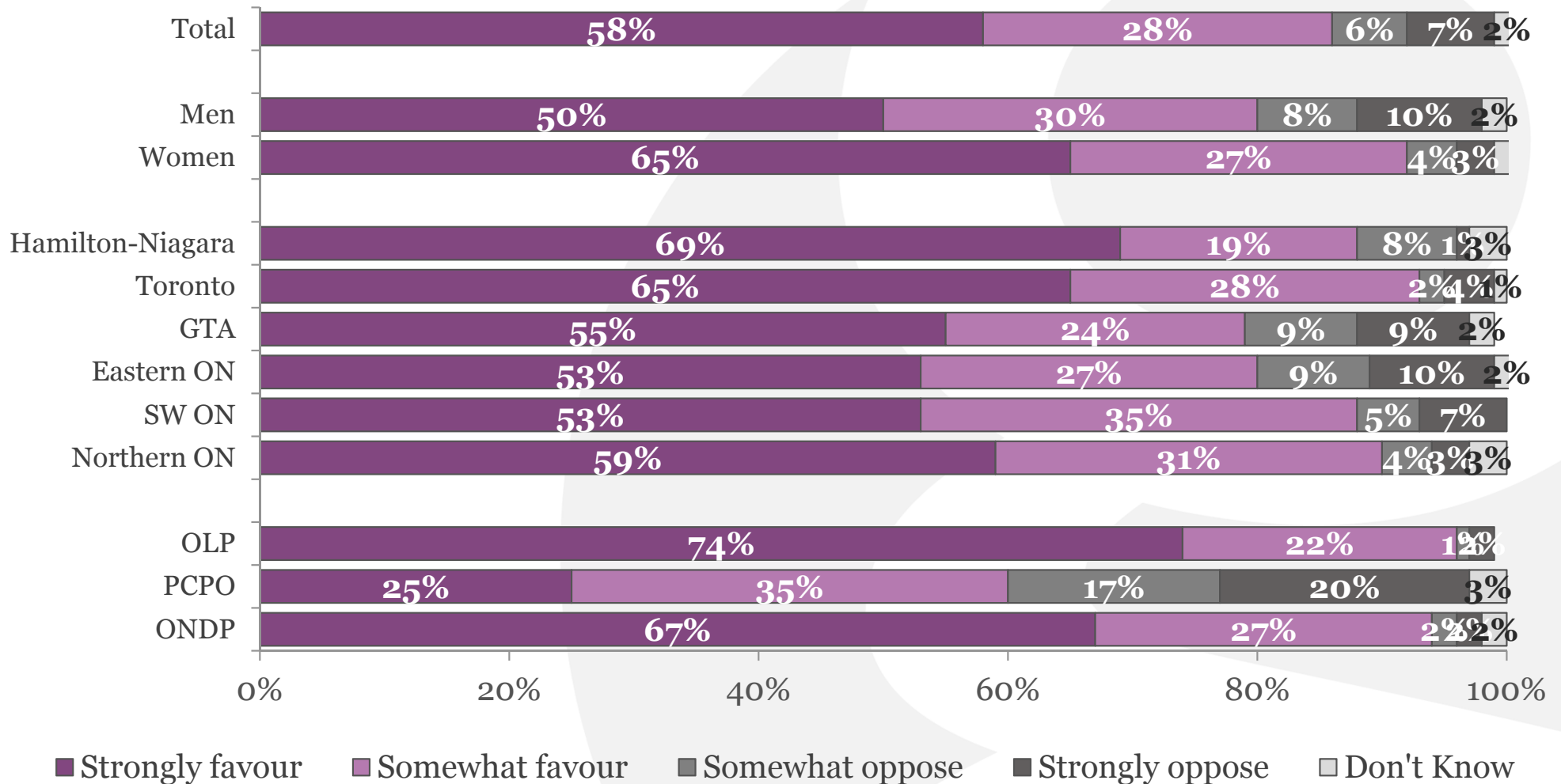


■ Strongly favour ■ Somewhat favour ■ Somewhat oppose ■ Strongly oppose □ Don't Know



Favourability towards Solar

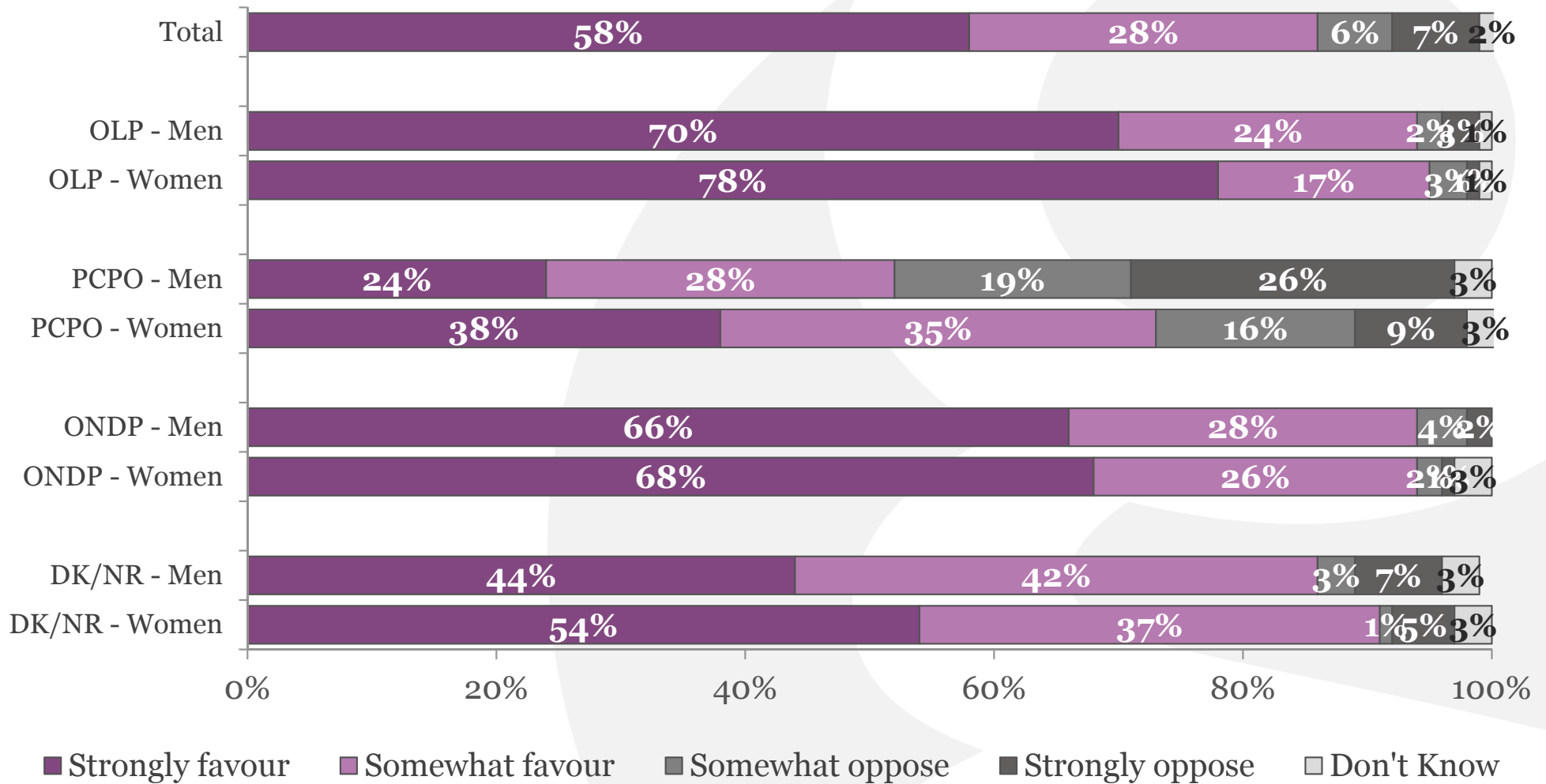
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Favourability towards Solar

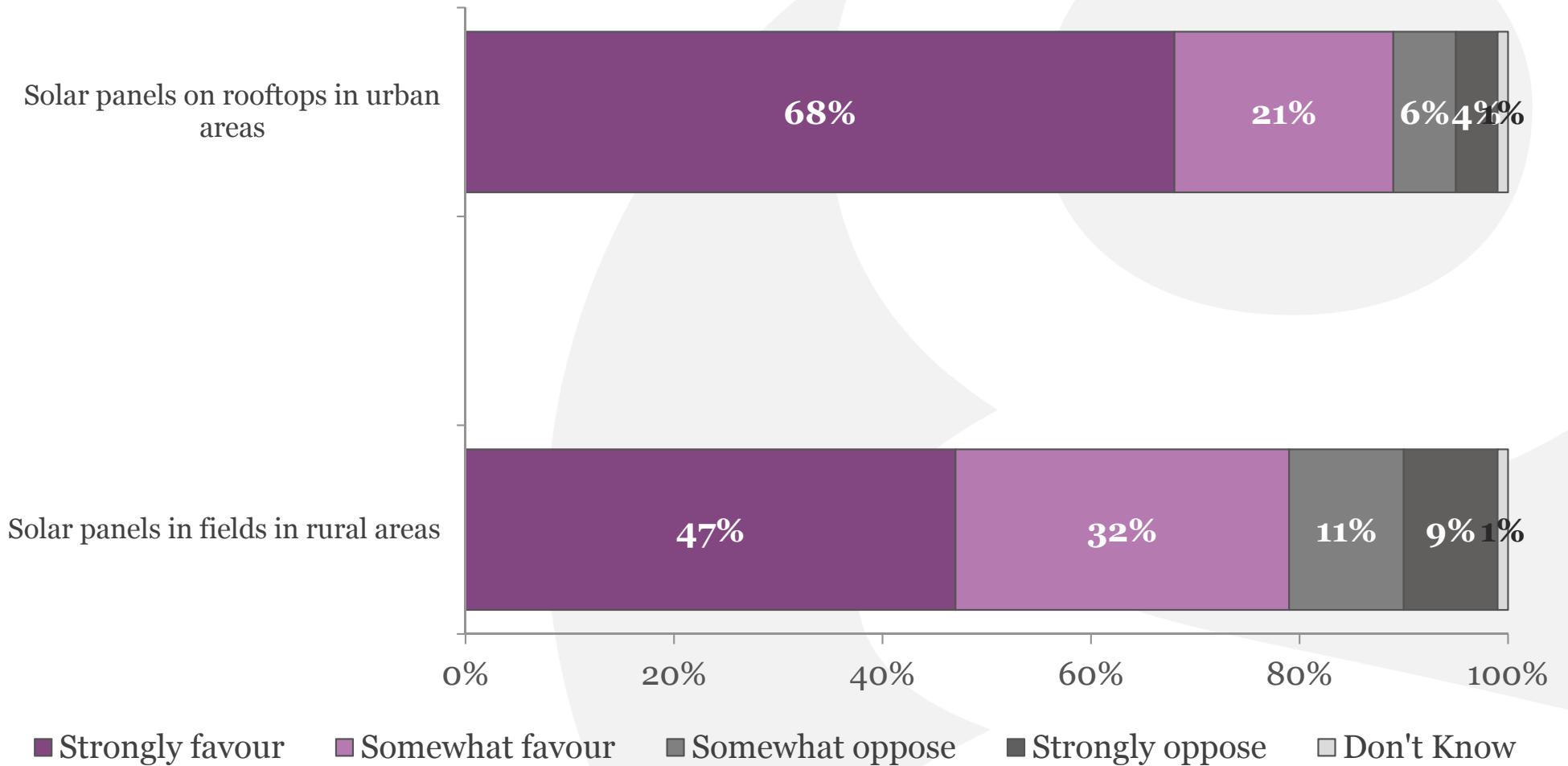
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Solar Energy Sources

“The following are ways of providing solar electricity for Ontario. Please indicate whether you strongly favour, somewhat favour, somewhat oppose or strongly oppose the increased use of each method to meet the future needs of Ontario?”

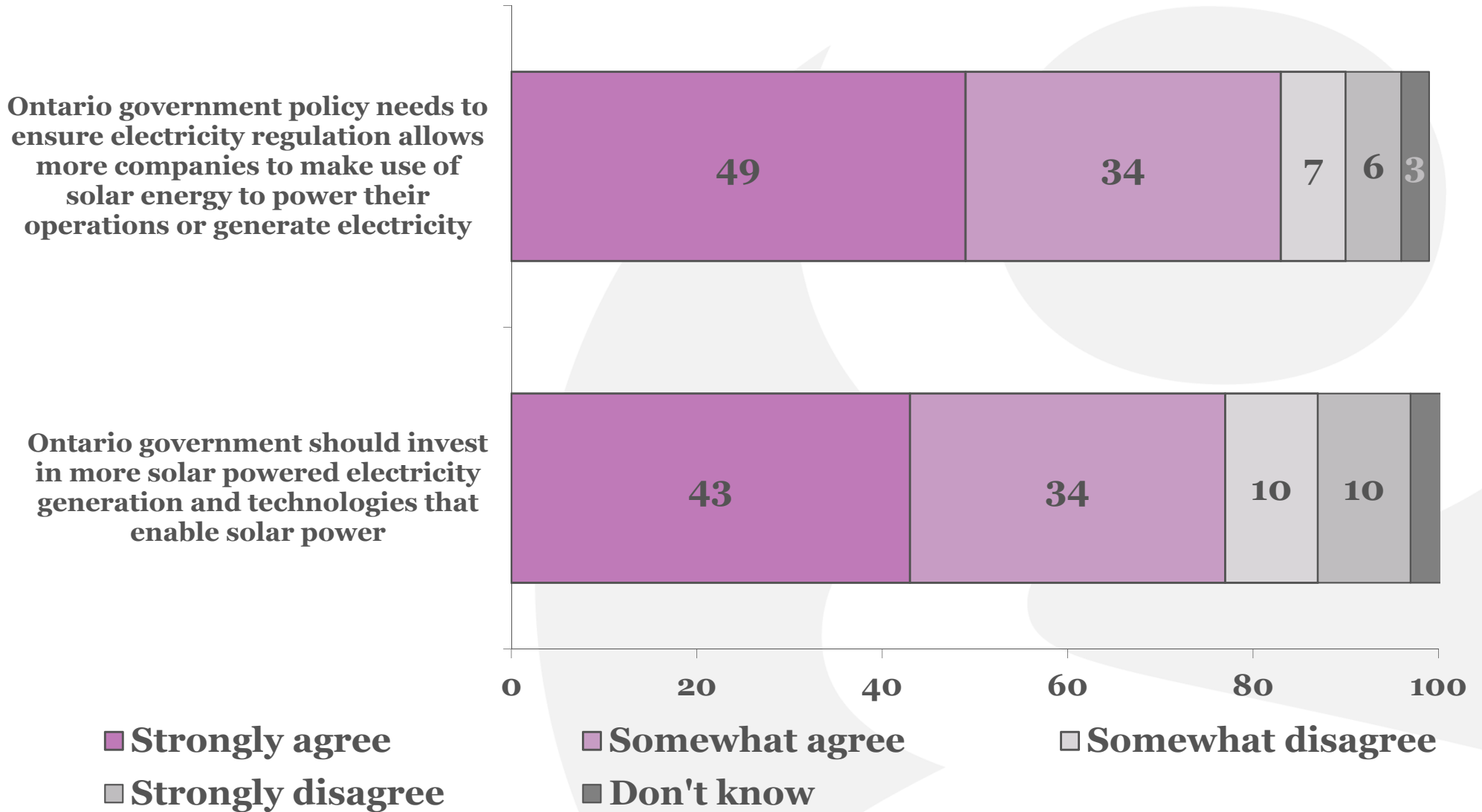




- ❑ The vast majority (83%) agree ON government policy needs to ensure electricity regulation allows more companies to make use of solar energy to power their operation or generate electricity.
- ❑ Almost as many (77%) agreed government should invest in “more solar powered electricity generation and technologies that enable solar power.”
- ❑ Nearly 8 in 10 agreed “Ontario needs to be a leader in the development of clean technology such as solar energy in North America,” or that “Canada’s future competitiveness in the global economy depends on having a growing clean technology sector, including solar and other clean energy sources.”
- ❑ Other sectors, notably information technology and agriculture will remain very important and more important for Ontario’s economy.
- ❑ Yet Ontarians rated solar and other clean-tech sectors combined as high in importance as more established sectors including auto assembly and retail.



Please tell us whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.

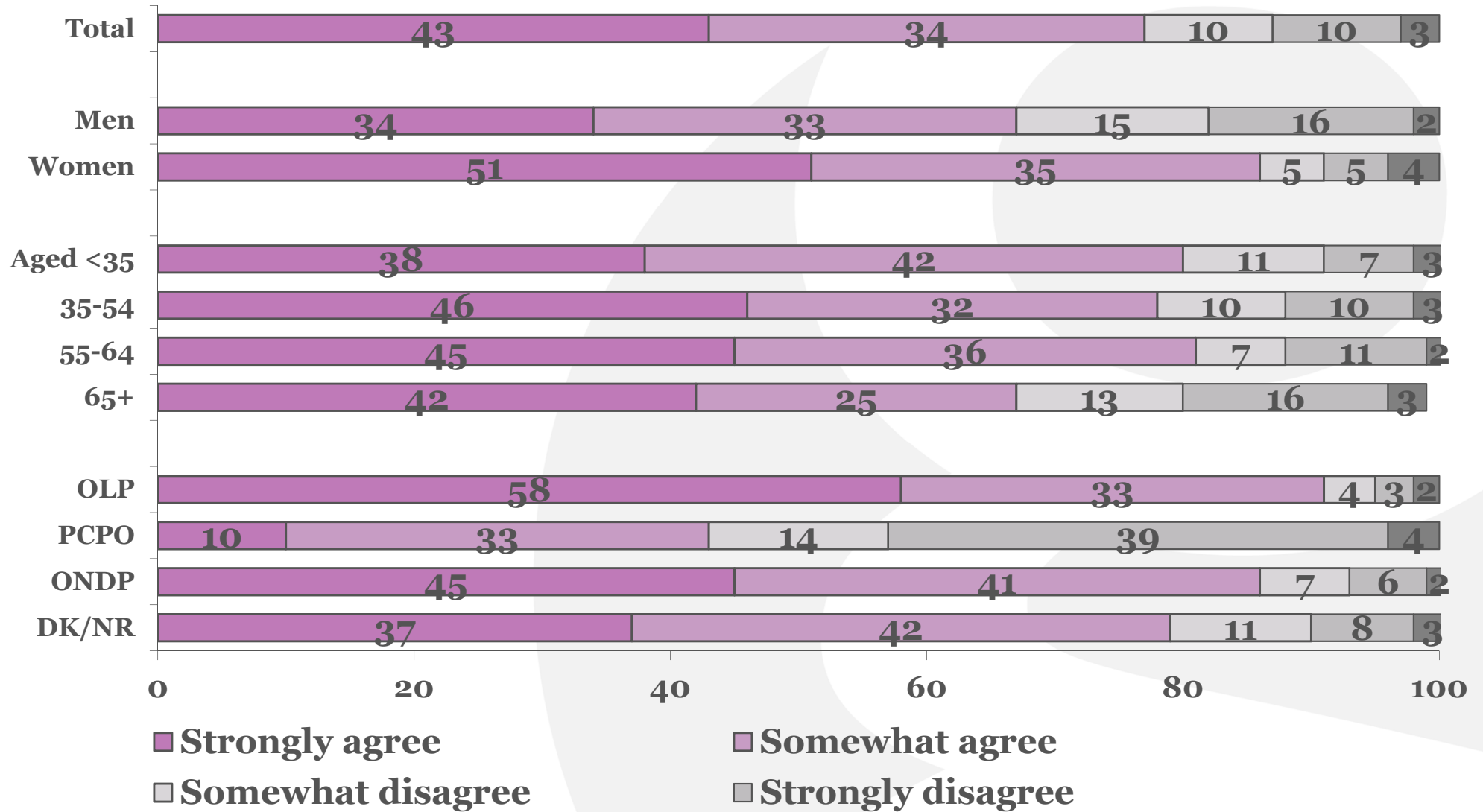




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ON Gov't Should Invest in Solar and Tech That Enables it

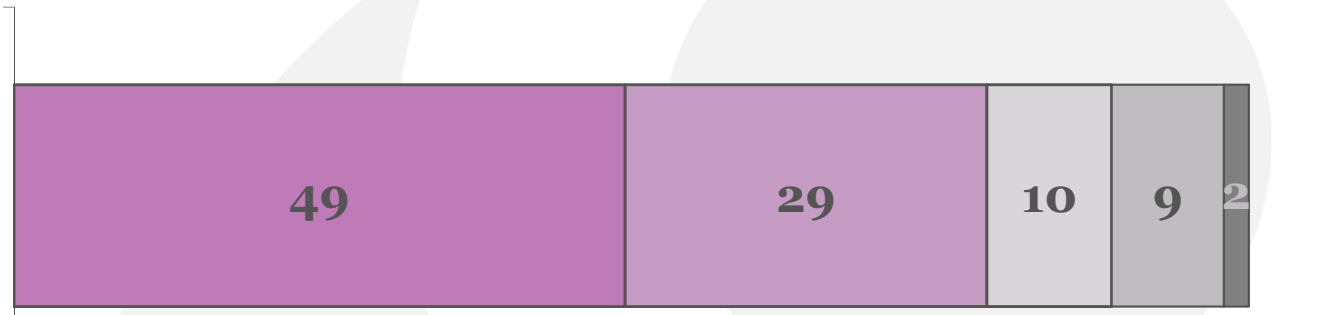
Please tell us whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.





Please tell us whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements.

Ontario needs to be a leader in the development of clean technology such as solar energy in North America



Canada's future competitiveness in the global economy depends on having a growing clean technology sector, including solar and other clean energy sources

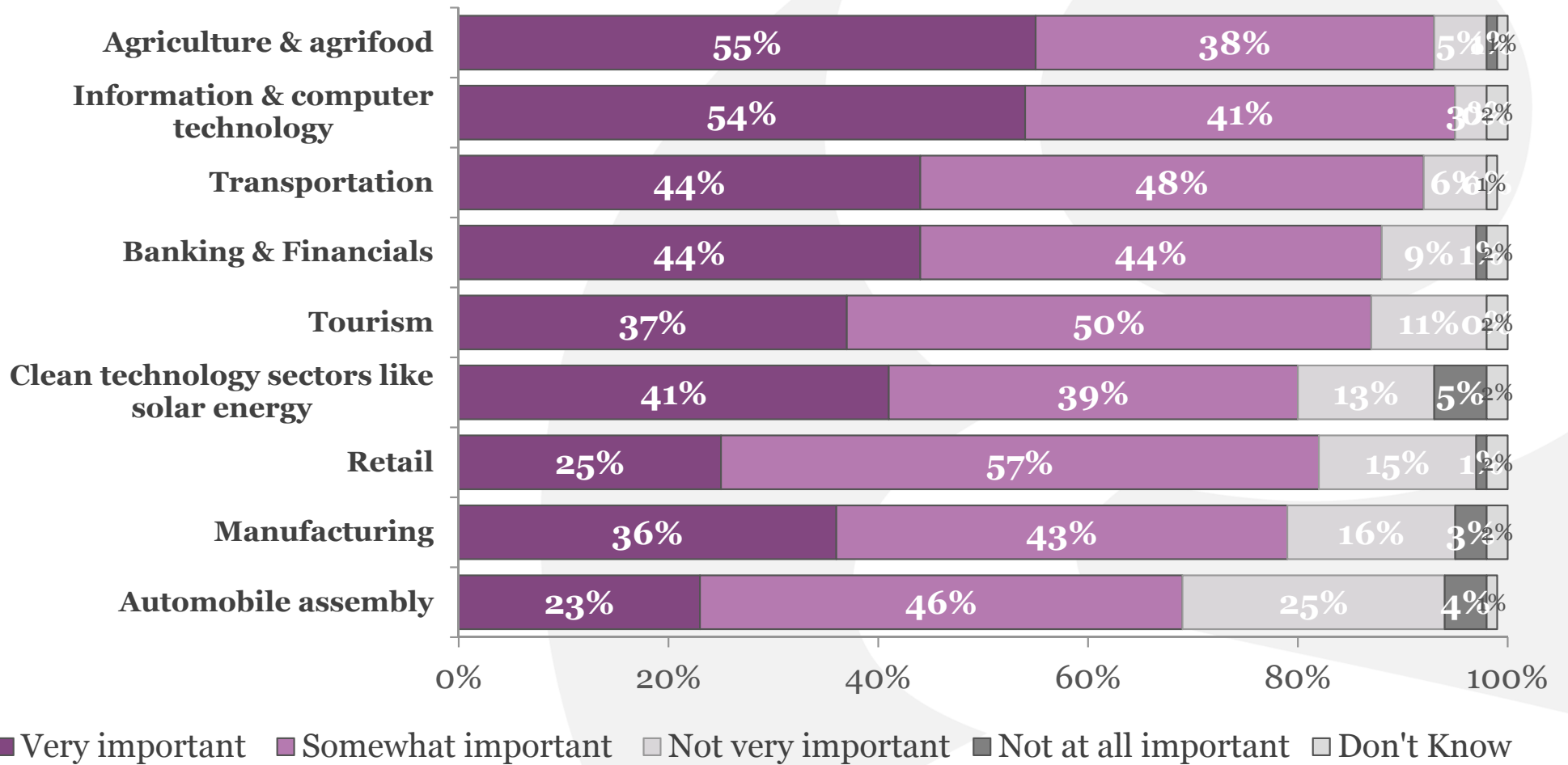


- Strongly agree
- Somewhat agree
- Somewhat disagree
- Strongly disagree
- Don't know



Industry Importance

“How important to Ontario's economy and employment in the province do you think the following industries will be over the next decade?” **Total Sample**





- ❑ Most Ontarians support “cap and trade” regulations – 65% support and 30% oppose.
 - Support is significantly higher among women, and younger Ontarians – support declines with age, but most men and most seniors still support this approach to climate change regulation.
 - A clear majority of PC voters oppose “cap and trade” and just over half oppose reinvesting revenues from this into solar.
- ❑ Even more (75%) support directing revenue from “cap and trade” in “solar energy and technologies that enable more solar power.”

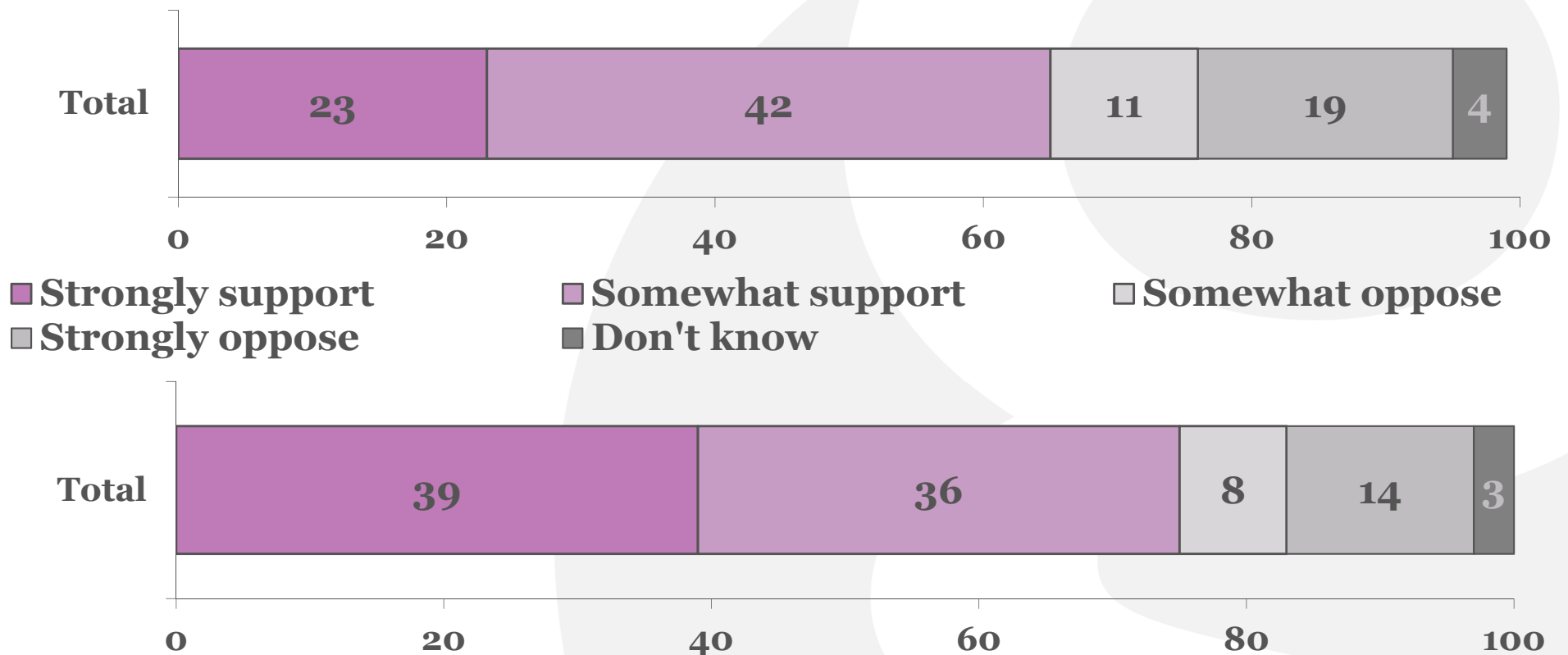


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Support for: Cap & Trade

Support for: Investing Cap & Trade Revenues in Solar

“The Ontario government has introduced a "cap and trade" proposal to reduce greenhouse gas pollution produced by industry. If companies do not emit as much as their "cap" they would be rewarded with a credit under this proposal. If companies do not emit as much as their “cap” they would be rewarded with a credit under this proposal. Companies that emit too much would need to invest in credits. Money raised would be reinvested into projects that reduce greenhouse gas pollution. Would you say that you are strongly supportive, somewhat supportive, somewhat opposed or strongly opposed to this? ”

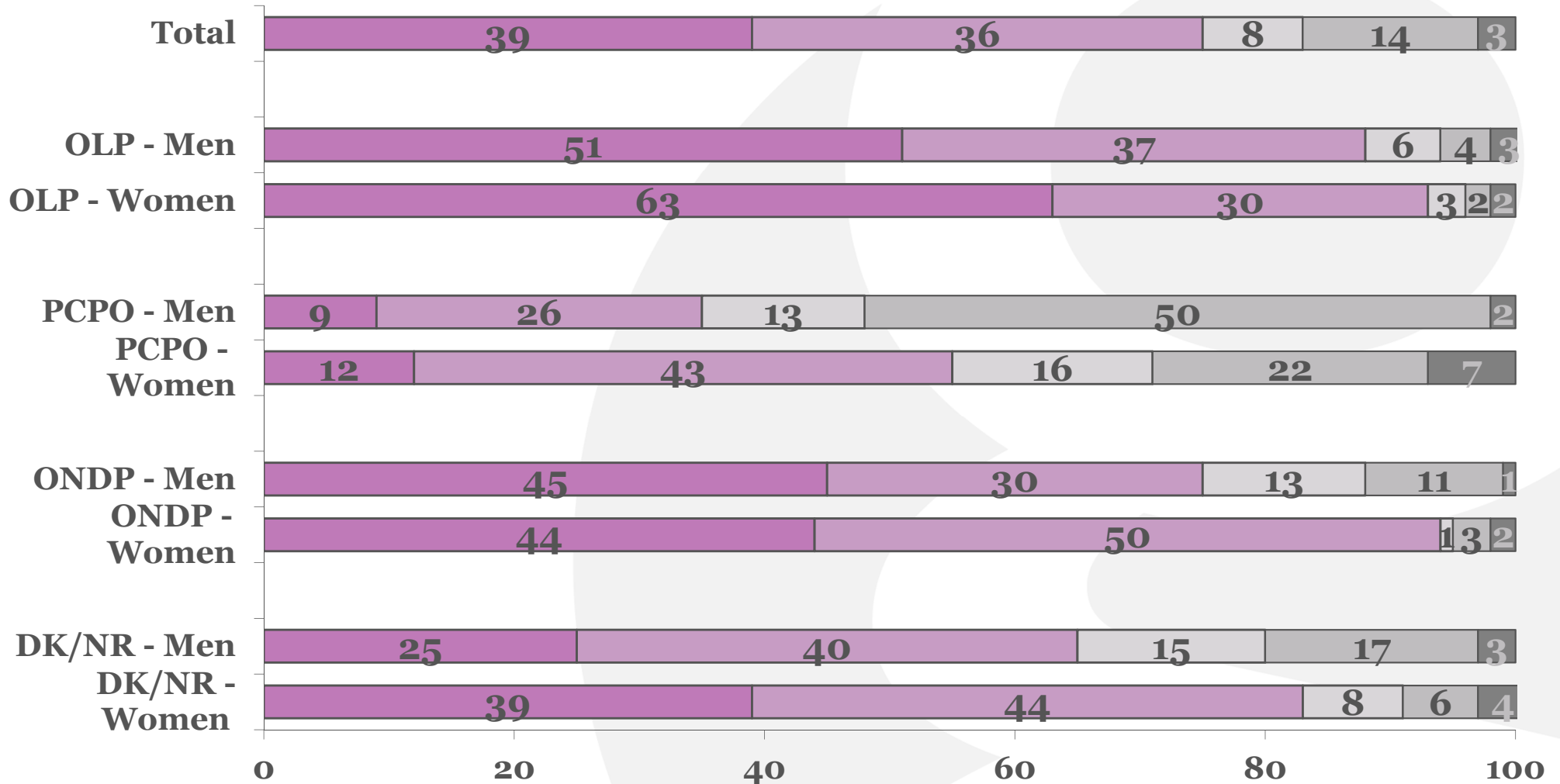


“Other North American jurisdictions that have a cap and trade system in place allocate a significant portion of the revenues raised to be invested in solar energy and technologies that enable more solar power. Would you say that you are strongly supportive, somewhat supportive, somewhat opposed or strongly opposed to this? ”



Support for: Cap & Trade Support for: Investing Cap & Trade Revenues in Solar

“Other North American jurisdictions that have a cap and trade system in place allocate a significant portion of the revenues raised to be invested in solar energy and technologies that enable more solar power. Would you say that you are strongly supportive, somewhat supportive, somewhat opposed or strongly opposed to this?”





- ❑ Solar has a very strong story to tell in terms of helping reduce pollution, now and in the future, combined with positioning Ontario to take advantage of opportunities in high-tech industrial sectors.
- ❑ While these are important, cost of living concerns are very important and the electricity sector will see more pressure from consumers on this issue.
- ❑ Reliability of supply is also very important.
- ❑ Solar needs to get its messages out about how it has improved its offering in these two respects: reliability and cost.
- ❑ That said: despite concern about the *Green Energy Act*, in some quarters, there is little opposition to continuing to increase the province's use of solar energy. It continues to figure among the top energy sources for Ontario's needs going forward.