

POLLARA

Green Energy Act, 2009 Survey

Presented to:

The Green Energy Act Alliance

April 2009

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Methodology

- POLLARA is pleased to present the Green Energy Act Alliance with the following report of findings surrounding opinions on the *Green Energy Act, 2009* (GEA), and wind power projects in Ontario.
- **Ontario-wide findings** are based on telephone surveys conducted with adult Ontarians, between March 13th and April 9th, 2009.
 - In total, 1203 interviews were completed, resulting in an overall margin of error of $\pm 2.8\%$, 19 times out of 20.
- **Essex County findings** are based on telephone surveys conducted with adult residents of Essex County between March 13th and March 16th, 2009.
 - In total, 301 interviews were completed, resulting in an overall margin of error of $\pm 5.6\%$, 19 times out of 20.
- **Scarborough findings** are based on telephone surveys conducted with adult residents of Scarborough between March 14th and March 16th, 2009.
 - In total, 305 interviews were completed, resulting in an overall margin of error of $\pm 5.6\%$, 19 times out of 20.
- Results were weighted by gender and region, based on the most recent census data, to ensure representative results.

Key Findings - Ontario

GEA Support

- **Ontarians strongly support the Ontario government adopting the GEA after they hear a short description of it – 87% are in support, including 62% who are strongly in support.**
 - Those in Toronto and the GTA 905 are the most likely to be strong supporters of the GEA's adoption (66% strongly support).

GEA Impact

- **Ontarians are most likely to see a reduction in greenhouse gas emissions (36%) as the main long-term benefit of the Act.**
 - One-in-five (19%) point to the creation of green collar jobs in the renewable energy industry as its primary benefit.
- **Seven times as many Ontarians believe the GEA will have a positive impact on Ontario's job market as those who believe it will have a negative impact (78% vs. 11%).**

Investment in Green Projects

- After hearing that the GEA supports renewable energy projects, 26% of Ontarians say they are very likely to invest in their own roof-top solar panel, while 21% say they are very likely to invest in a local wind farm, and 18% say they are very likely to invest in a local solar project.

Key Findings – Essex County

GEA Support

- **There is initial widespread support (86%) for government plans to adopt the GEA, after being read a short description of the act.**
 - Support is slightly stronger outside of Windsor than within the city (91% vs. 82%).
- Although the creation of jobs is rarely listed top-of-mind as a benefit of the GEA, most feel the act will have a positive impact on the job market in both Ontario (62%) and Essex County (60%).

Essex Wind Farms

- **Residents are more aware of plans to build wind farms in Essex County than they are of plans to adopt the GEA – 84% are aware of the local plans, including 20% who are very familiar.**
- **There is widespread support for this proposal in Essex County: 84% are in support and 11% are in opposition.**
 - Support for the farms is similar in Windsor and in the rest of Essex County (84% support in each region).

Key Findings – Scarborough

GEA Support

- **After being read a short description of the GEA, nine-in-ten (92%) residents express initial support of the government's plan to adopt the act.** This includes 61% of all residents who strongly support the plan.
- A diverse range of reasons are given for supporting the adoption of the GEA, with environmental benefits (30%) the most common.

Wind Power in Scarborough

- **Two-third (67%) of all Scarborough residents are familiar with plans to test the viability of generating wind power off the Scarborough Bluffs, but only 14% are very familiar.**
- **Four-in-five (79%) support the plan to build a wind measuring device off the Scarborough shore to test the viability of generating wind power there, with 13% opposed.**
 - Strong supporters outnumber strong opponents by a five-to-one ratio (51% vs. 9%).
 - Familiarity with this proposal is stronger south of the CNR tracks, closer to the shore. Overall support levels are similar there (76%) as elsewhere, however strong opposition to the plan is concentrated there (17% there strongly oppose it).

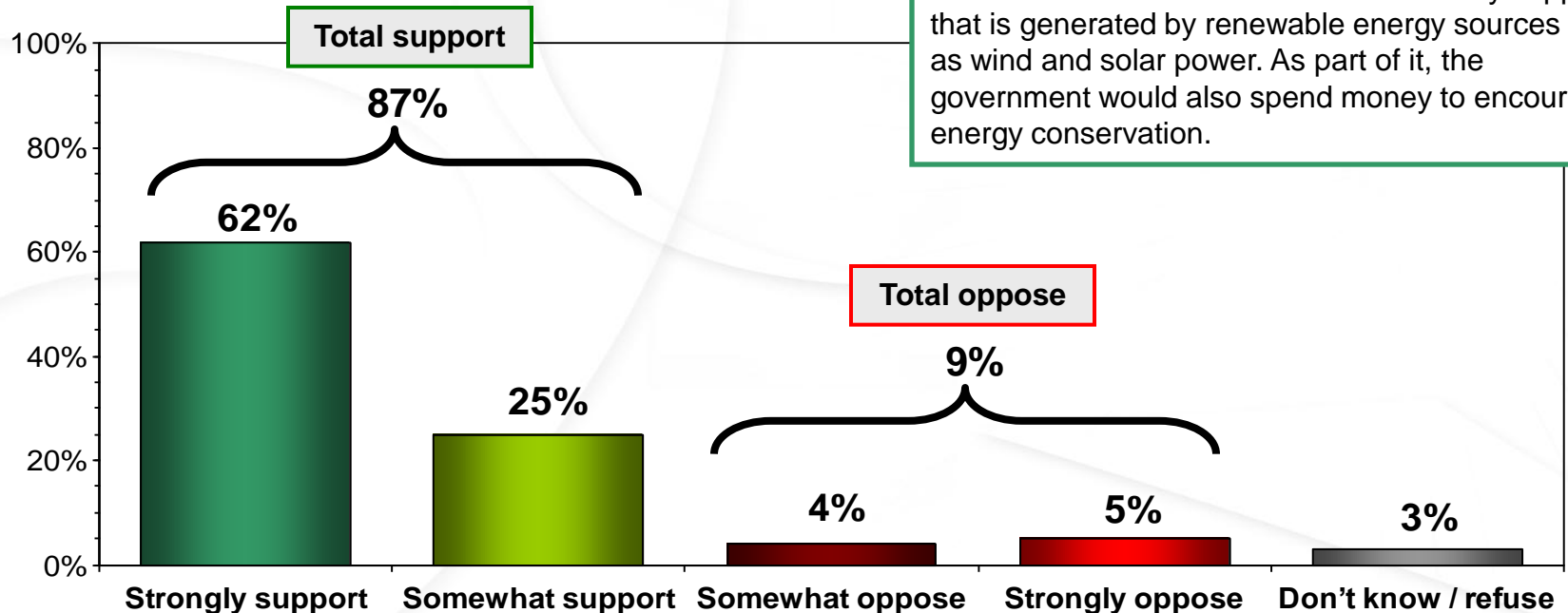
Ontario-Wide Results

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Support for the *Green Energy Act, 2009:* *Initial Support is Strong, with Few Opponents*

- After being read a short description of it, a strong majority (87%) of Ontarians support the Ontario government adopting the GEA. This includes 62% of Ontarians who strongly support them implementing the act – far more than the 5% who strongly oppose its adoption.

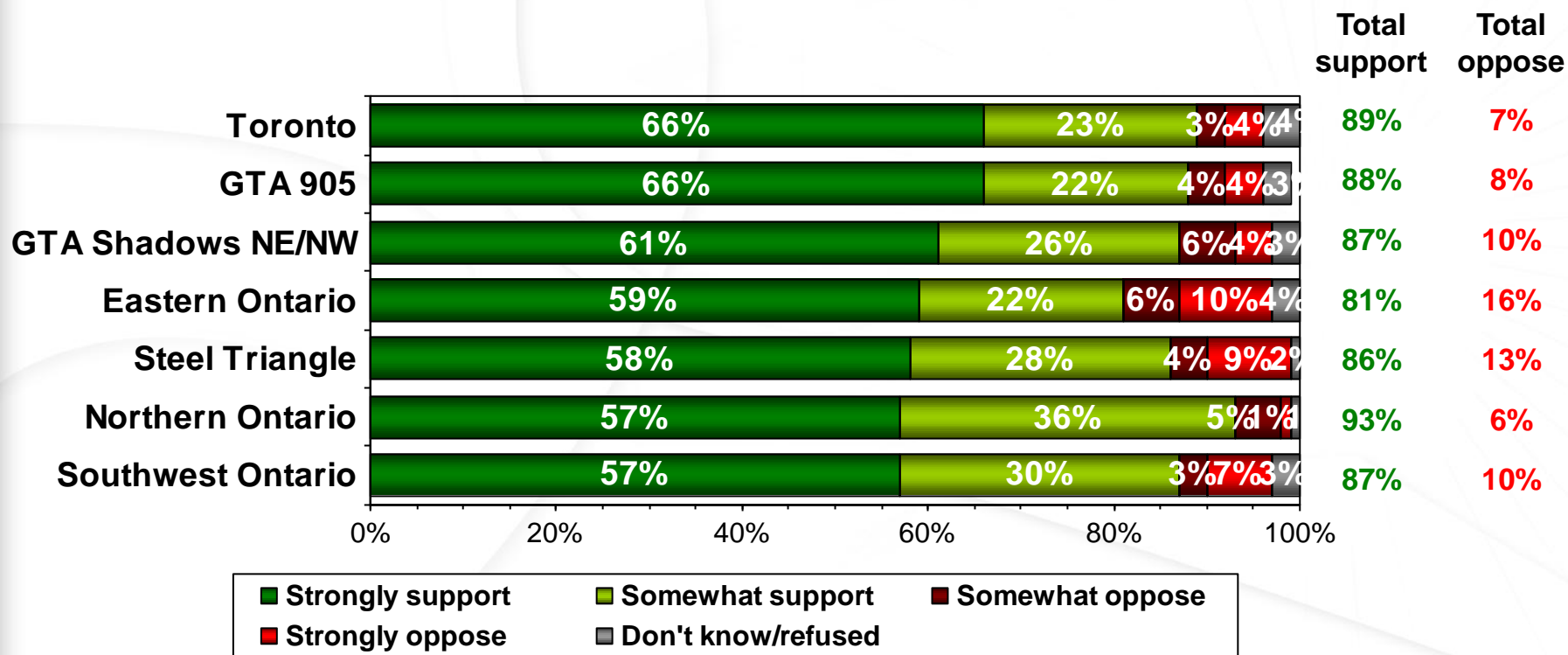
GEA Description: The Ontario government has proposed a Green Energy Act, which would increase the amount of Ontario's electricity supply that is generated by renewable energy sources such as wind and solar power. As part of it, the government would also spend money to encourage energy conservation.



QEDF1. [READ DEFINITION] Would you say you support or oppose the Ontario government adopting this "Green Energy Act"? (...) Is that strongly or somewhat support/oppose?

Support for the GEA, by Region: *Support Strongest in GTA*

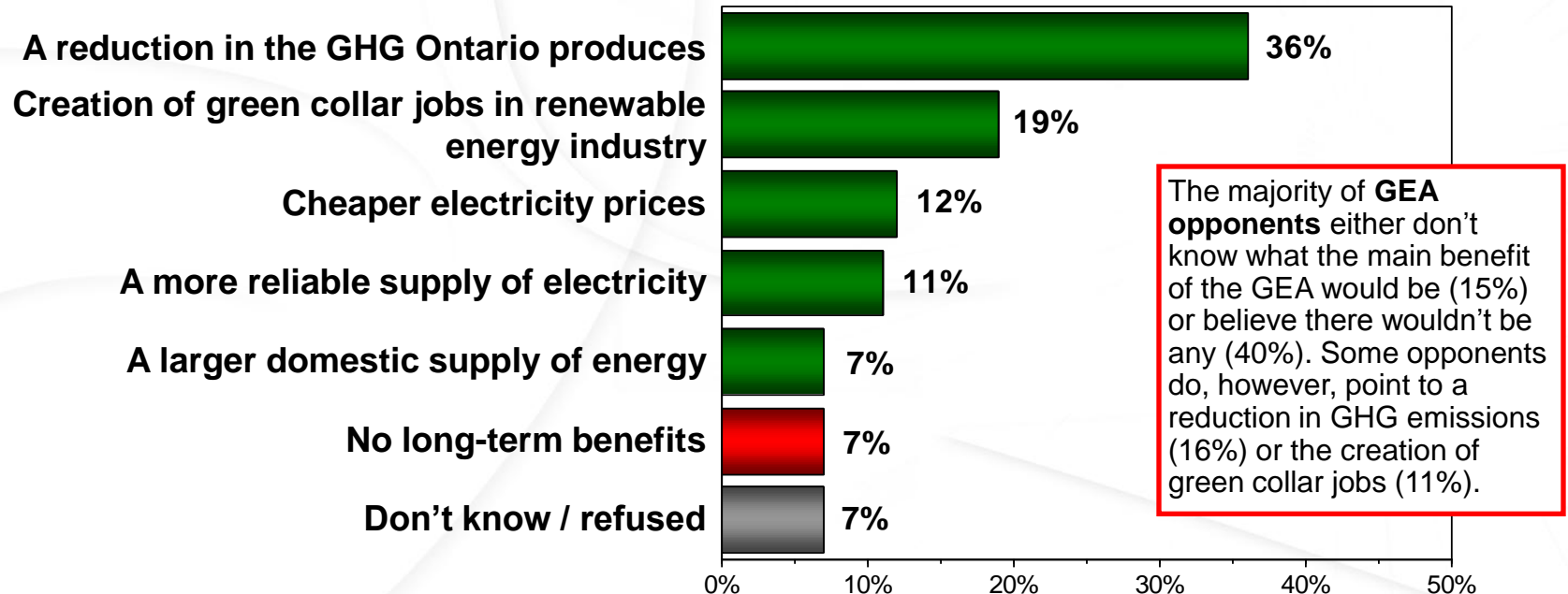
- There is widespread support for the GEA in all parts of the province (at least 81% support), however support is strongest within Toronto and the 905, where two-in-three (66%) strongly support the Act.
- Total GEA support is lowest in Eastern Ontario, where 81% support the Act and 16% oppose it, including 10% who strongly oppose it.
- Support for the GEA is stronger in urban areas (64% strongly support) than in rural Ontario (55%).



QEDF1. [READ DEFINITION] Would you say you support or oppose the Ontario government adopting this "Green Energy Act"? (...) Is that strongly or somewhat support/oppose?

Main Long-Term Benefit of the GEA: *Environment Pointed to as Main Benefit, Ahead of Financial, Energy Issues*

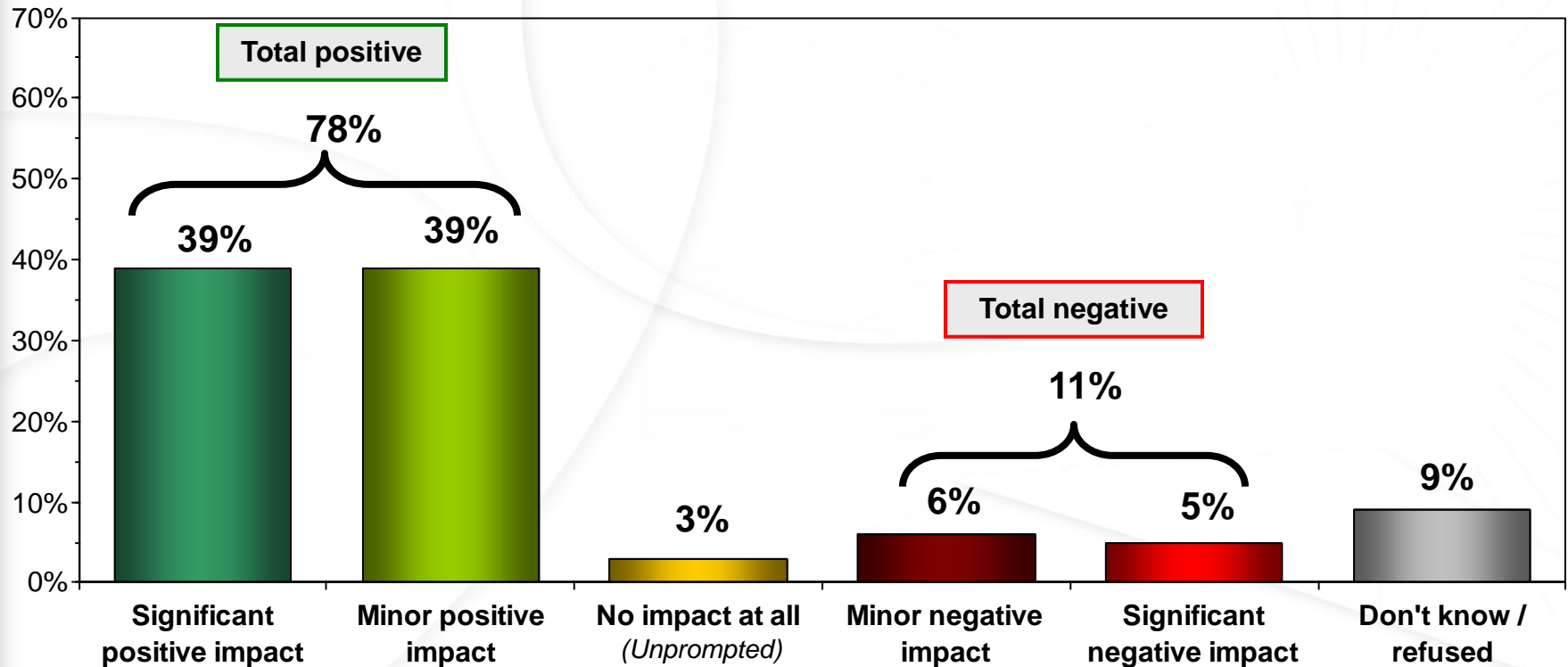
- The environment is seen as the most readily identifiable benefit of the GEA, with 36% selecting a reduction in Ontario's greenhouse gas production as the primary benefit of the Act (from a list of possible benefits).
- Three-in-ten point to economic benefits, believing the GEA will lead to the creation of green collar jobs (19%), or cheaper electricity prices (12%).
- Ontarians under 45 are more likely than older Ontarians to see green jobs as the main benefit of the GEA (26% vs. 16%).



QEDF2. What do you think would be the main long-term benefit of this Green Energy Act? [READ]

Perceived Impact of the GEA on Ontario's Job Market: *Most Expect Positive Impact*

- Two-in-five (39%) Ontarians believe the GEA would have a significantly positive impact on Ontario's job market, with an equivalent number (39%) believing it would have a minor positive impact.
- Perceptions are similar in all regions, with between 74% and 79% believing the GEA would have a positive impact on Ontario's job market.

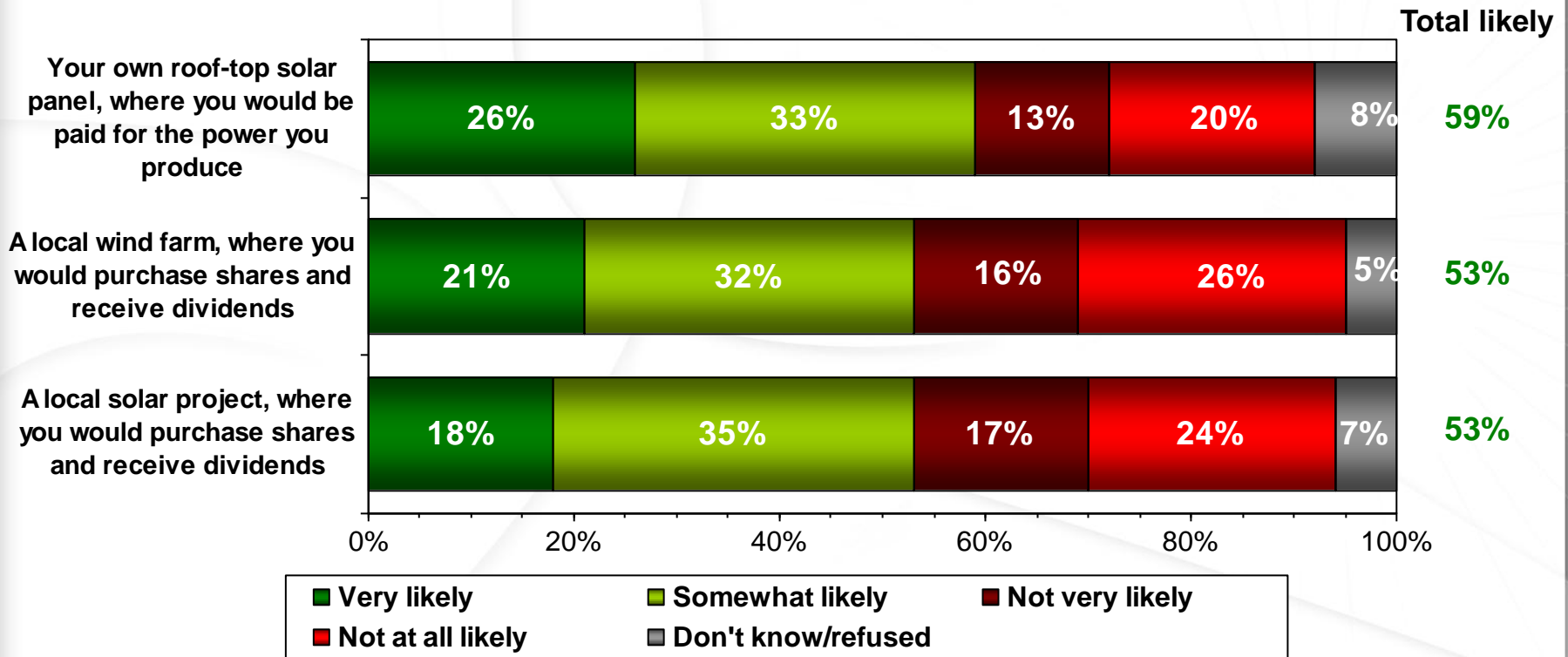


QEDF3. Overall, do you think this Green Energy Act would have a positive impact or a negative impact on Ontario's job market? (...) Is that a significant or a minor positive/negative impact?

Likelihood of Investing in Green Projects:

Moderate Likelihood of Investment

- More say they would be very likely to own their own roof-top solar panel (26%), than the number who say they would be very likely to invest in local wind (21%) or solar (18%) projects.
- Among GEA opponents, 13% say they are very likely to invest in their own roof-top solar panel, while 11% are very likely to invest in a local wind farm, and 7% are very likely to invest in a local solar project.



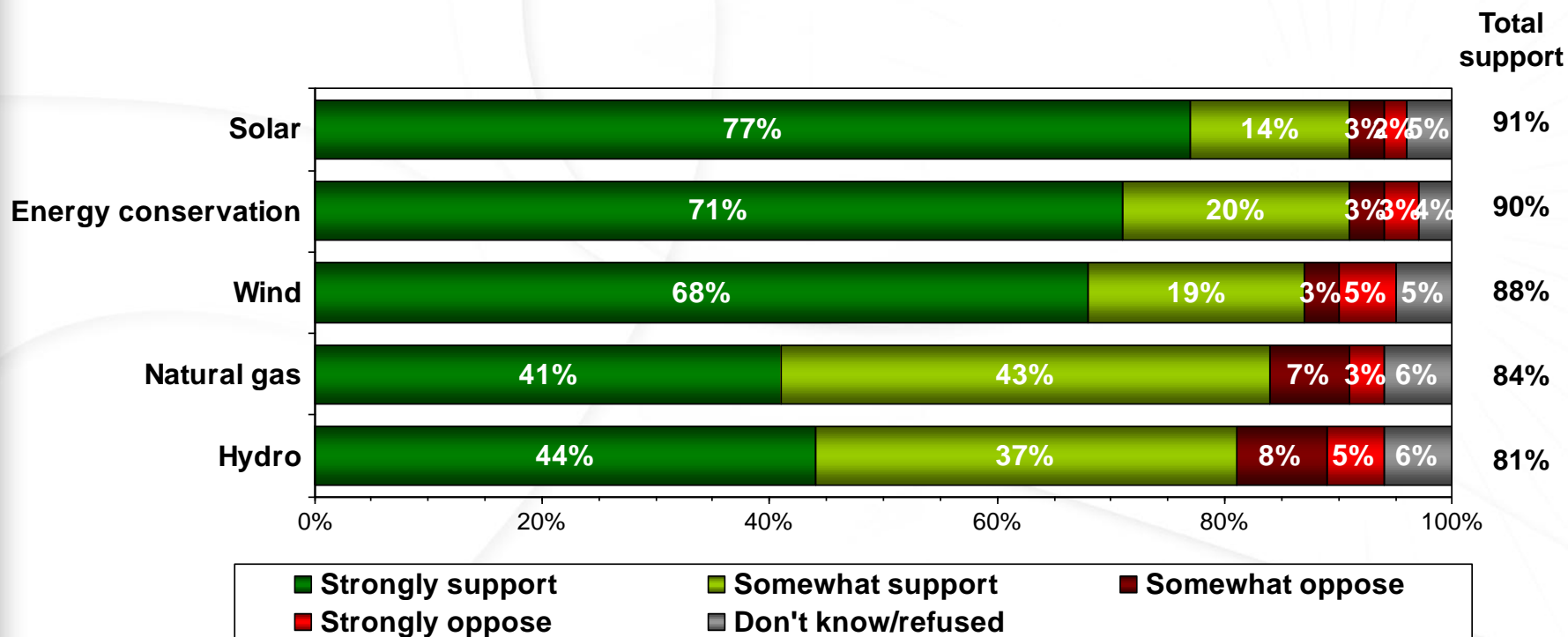
QEDF4-QEDF6. In addition to supporting renewable energy projects that are developed and owned by commercial businesses, the Green Energy Act also supports projects that are proposed by communities, farmers, and individual homeowners. Thinking about this, would you be very likely, somewhat likely, not very likely, or not at all likely to invest in each of the following projects:

Essex County Results

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Support/Oppose Increased Use for Future Electricity Needs (Top Five): *Strong Support for Solar, Wind, and Energy Conservation*

- Solar, energy efficiency and conservation programs, wind, natural gas, and hydro all enjoy widespread and strong support, with at least four-in-five Essex County residents supportive, and at least two-in-five very supportive of them as methods of meeting Ontario's energy needs.
- Solar power, energy conservation, and wind power enjoy the strongest support in the community (77%, 71%, and 68%, respectively).

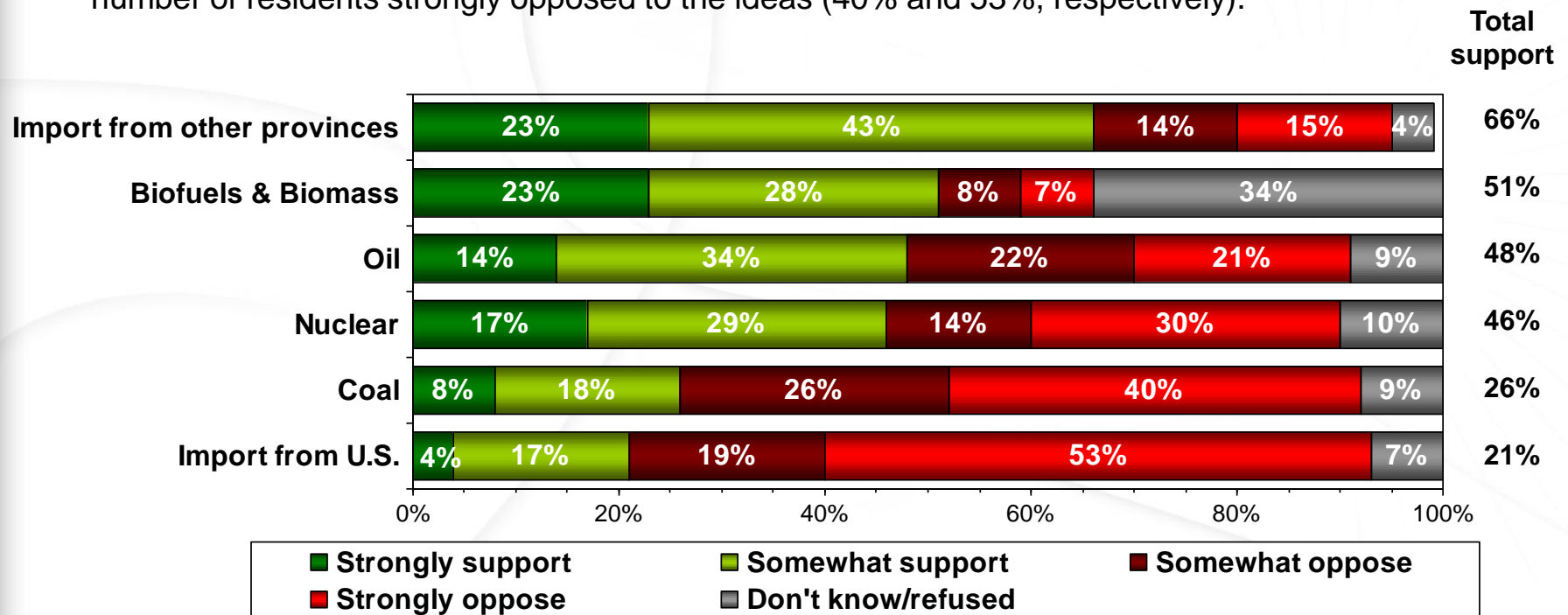


Q1-11.

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

Support/Oppose Increased Use for Future Electricity Needs: *Strong Opposition to Importing from U.S., Coal*

- Importing power from other provinces has a clear majority of support (66%), but it does not enjoy the same strong support levels as the five options listed on the previous slide. There is also soft support for using biofuels and biomass, although one-third (34%) in the community have no opinion, indicating a low level of familiarity with that energy source.
- Residents are divided on the increased use of oil and nuclear power, with strong opponents outnumbering strong supporters.
- Coal power and importing electricity from the U.S. are the least appealing options, with a large number of residents strongly opposed to the ideas (40% and 53%, respectively).

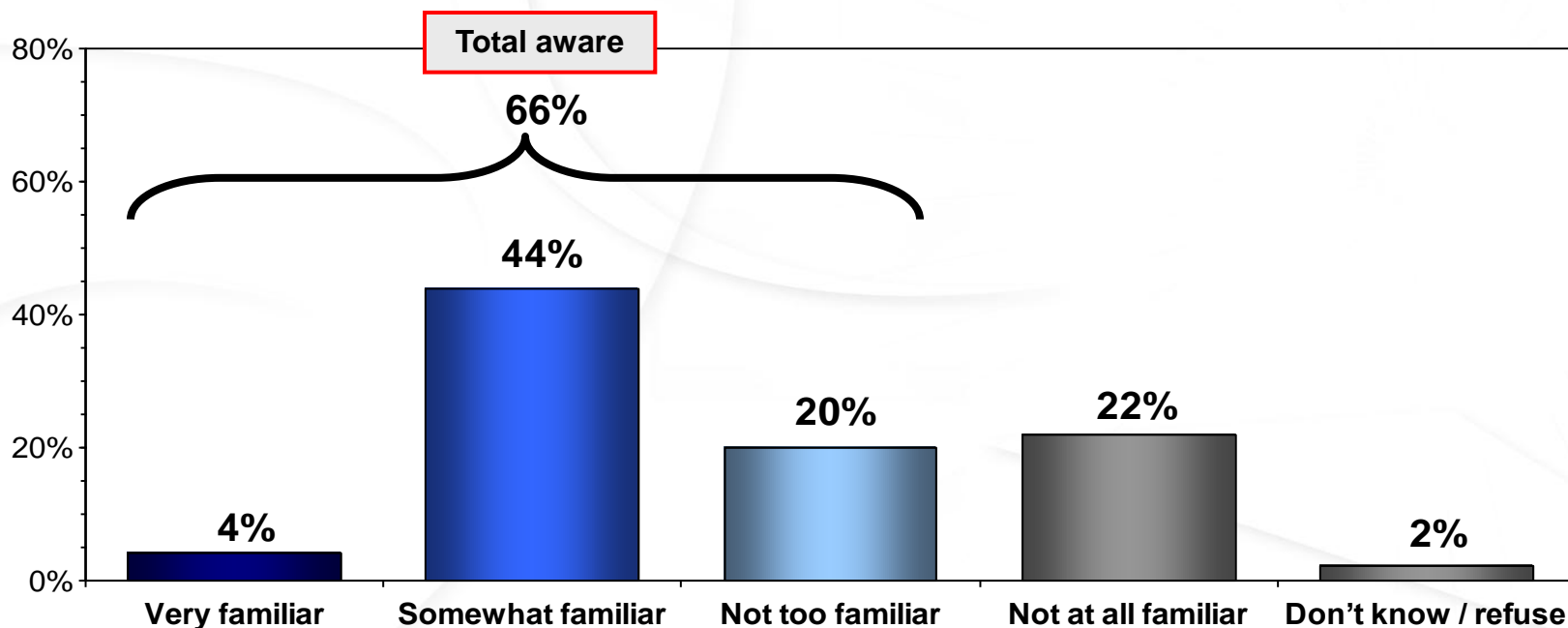


Q1-11.

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

Familiarity with the *Green Energy Act, 2009*: *Two-Thirds Aware but Few Are Very Familiar*

- Two-thirds (66%) of Essex County residents are aware of the Ontario government's plan to adopt the GEA, and close to half (48%) are familiar. However, familiarity remains quite superficial, with only 4% considering themselves very familiar with these plans.
- Familiarity is more widespread outside of Windsor (52% vs. 45%), but even there, only 4% are very familiar with it.
- Familiarity is relatively consistent across all age, gender, and income groups.

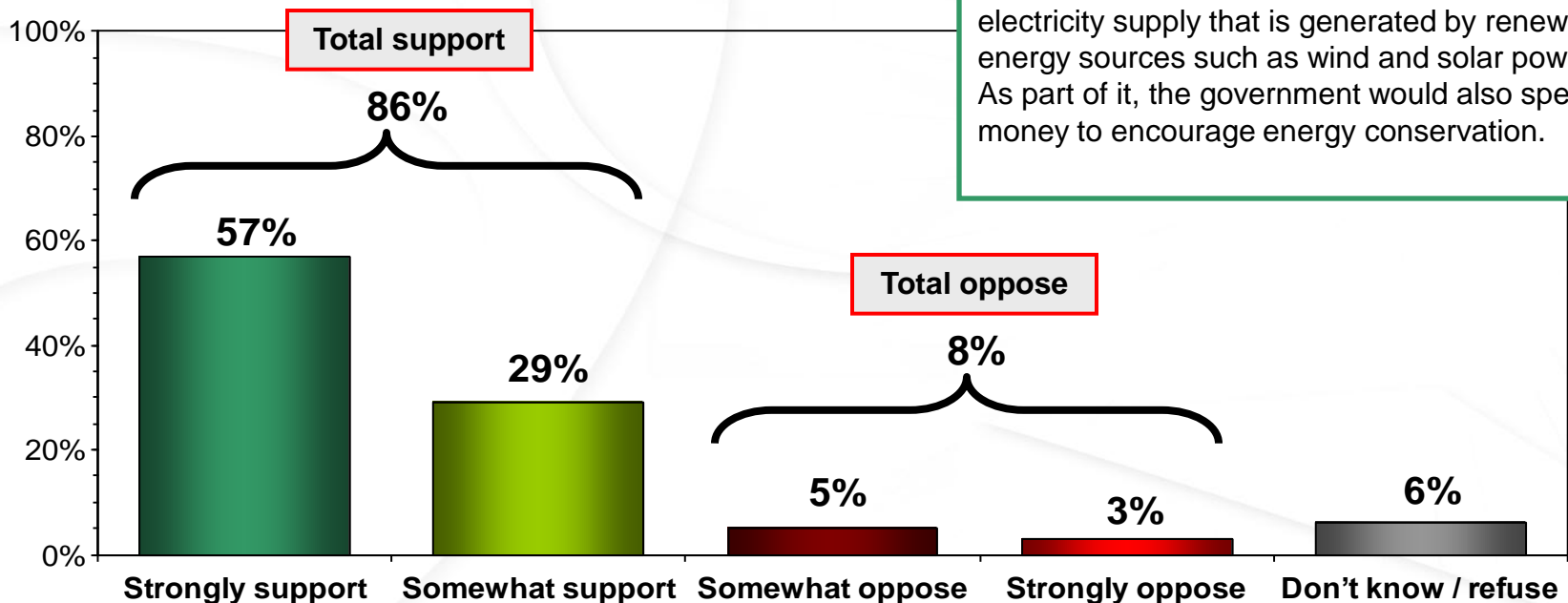


Q12. How familiar are you with the Ontario government's plan to adopt a Green Energy Act?

Support for the *Green Energy Act, 2009:* *Initial Support is Intense, with Few Opponents*

- A majority (57%) of Essex County residents strongly support the adoption of the GEA after being read a short description of it, with 86% supportive in total. There is little opposition in Essex County, with 8% of residents opposing it, including 3% who strongly oppose it.
- Support levels are slightly higher outside of Windsor than within the city itself (91% support vs. 82% support).
- Familiarity with the government's plans does little to change opinions, as support is equal among those who are and aren't familiar.

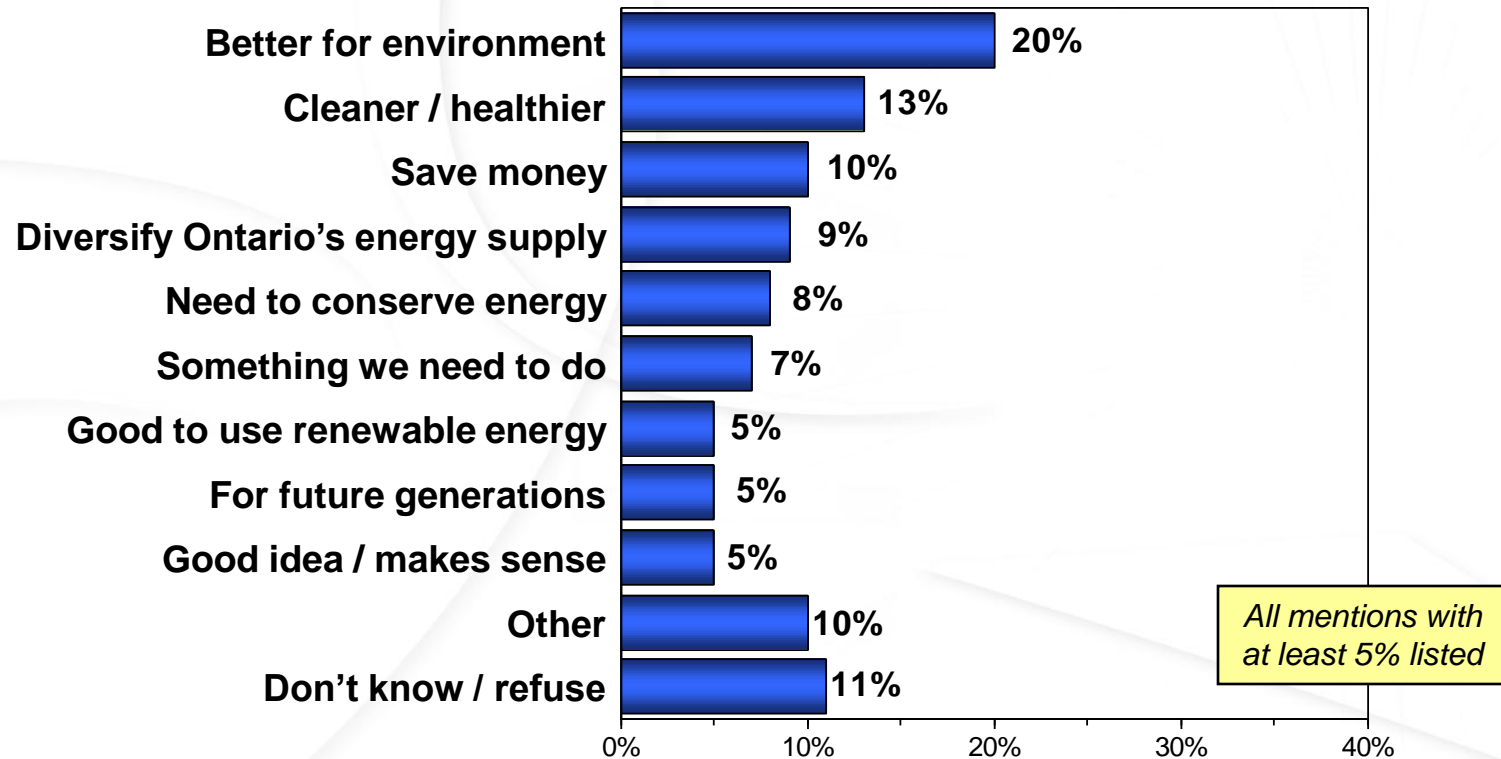
GEA Description: The proposed Green Energy Act would increase the amount of Ontario's electricity supply that is generated by renewable energy sources such as wind and solar power. As part of it, the government would also spend money to encourage energy conservation.



Q13. *The proposed Green Energy Act would increase the amount of Ontario's electricity supply that is generated by renewable energy sources such as wind and solar power. As part of the government would also spend money to encourage energy conservation. Would you support or oppose the Ontario government adopting this Green Energy Act?*

Reasons for Supporting the GEA: *Environment, Public Health are Priority Reasons, Followed by Energy Supply Focus*

- The reasons offered for supporting the adoption of the GEA are widespread, with the most common being that it is good for the environment (20%).
- Positive economic effects are not readily identified as the main benefit, with 10% saying this will help Ontario save money and 2% saying it will create new jobs.

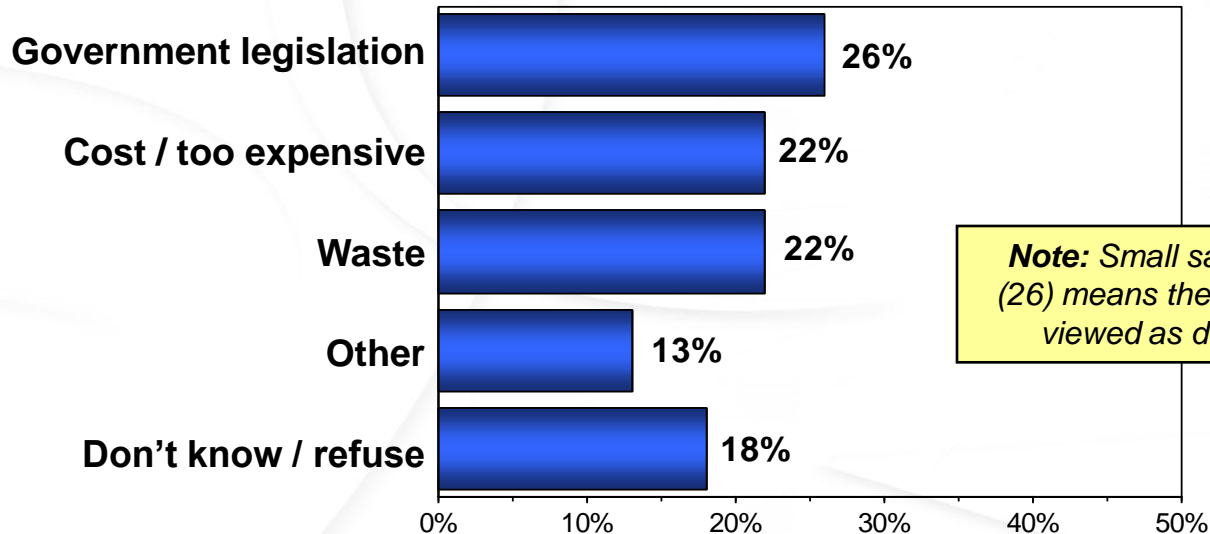


Q14. What would you say is your main reason for supporting the Green Energy Act? (OPEN ENDED. ACCEPT FIRST MENTION)

BASE: SUPPORTERS ONLY

Reasons for Opposing the GEA: *Financial Issues at the Forefront*

- Opponents of the GEA in Essex County offer three main reasons for opposing the legislation: they inherently distrust any form of government legislation in this field (26%), they believe wind energy costs too much to produce (22%), and they believe it will be a waste of money (22%).



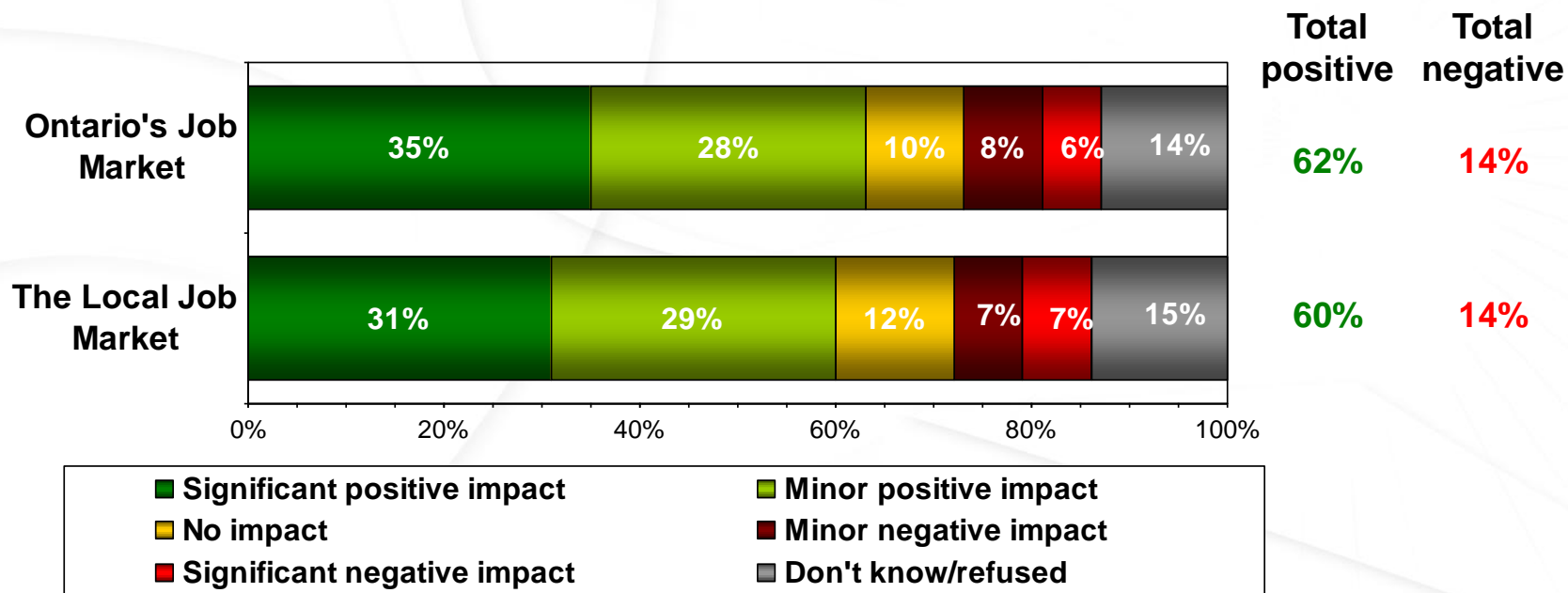
Note: Small sample of opponents (26) means these results should be viewed as directional, at best

Q15. What would you say is your main reason for opposing the Green Energy Act? (OPEN ENDED. ACCEPT FIRST MENTION)

BASE: OPPONENTS ONLY

The GEA's Expected Impact on Job Market: *Moderately Positive, Few See Neutral or Negative Impact*

- Three-in-five (62%) believe the GEA will have a positive impact on Ontario's job market, compared to 14% who believe it will have a negative impact. The numbers are similar when focusing on the Essex County job market (60% positive, 14% negative).
- Those who believe the GEA will have a significantly positive impact outnumber those who believe it will have a significantly negative impact by a six-to-one ratio (35% vs. 6%) when considering the province as a whole, and by a four-to-one ratio (31% vs. 7%) when thinking about Essex County.
- There are few regional differences within Essex County – an equal number (60% each) of those living inside and outside of Windsor believe the GEA will help the local job market.

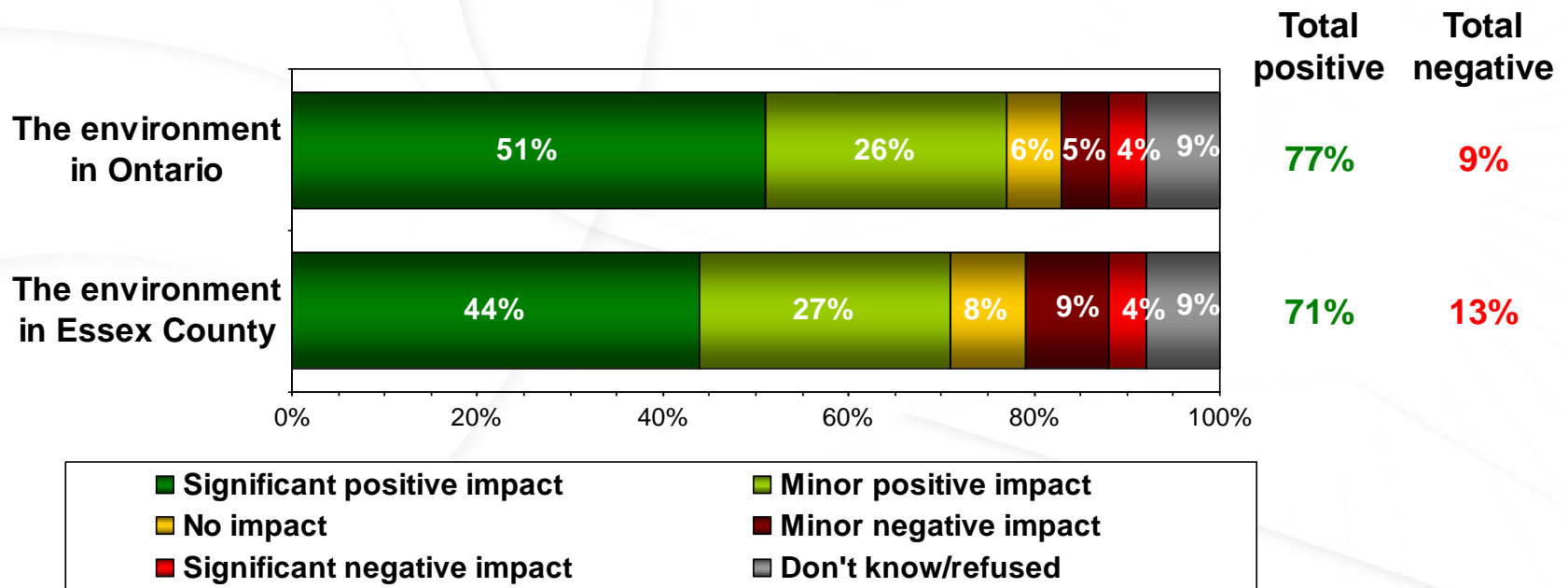


Q16-17.
have

For each of the following, please let me know if you think the Green Energy Act would have a negative impact, a positive impact, or no impact at all. (...) Is that a significant or minor positive/negative impact?

The GEA's Expected Impact on the Environment: *Highly Positive*

- Over three-quarters (77%) of all residents believe the GEA will have a positive impact on Ontario's environment, with one-in-ten (9%) believing it will have a negative impact. Residents hold similar, but less optimistic, opinions when considering its impact on the local environment (71% positive, 13% negative).
- Residents inside and outside of Windsor hold similar opinions on how the GEA will effect the local environment (Windsor: 69% positive vs. 13% negative; Rest of Essex County: 73% positive vs. 12% negative).
- Men are more likely than women to believe the GEA will have a positive economic impact, while women are more likely to believe it will have a positive environmental impact.

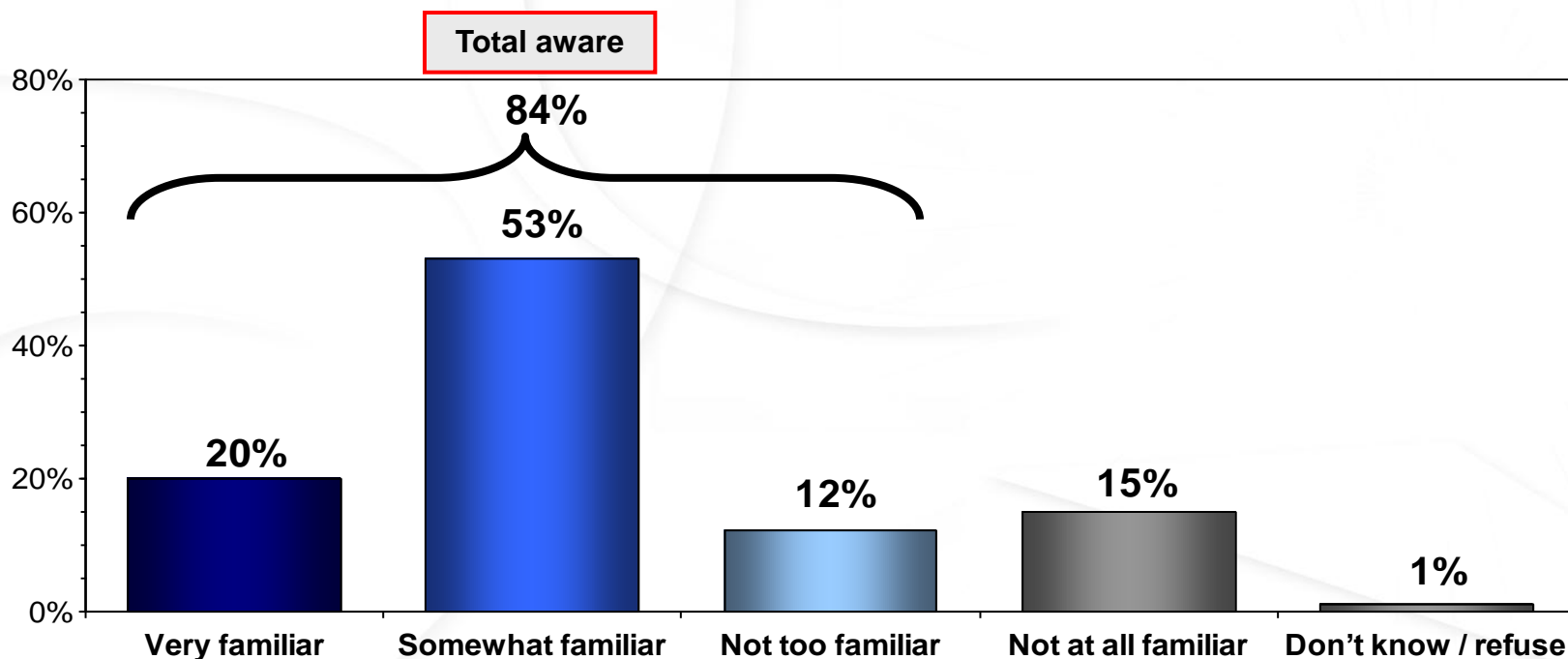


Q18-19.
have

For each of the following, please let me know if you think the Green Energy Act would a negative impact, a positive impact, or no impact at all. (...) Is that a significant or minor positive/negative impact?

Familiarity with Wind Farm Proposal: *Most are Somewhat Familiar*

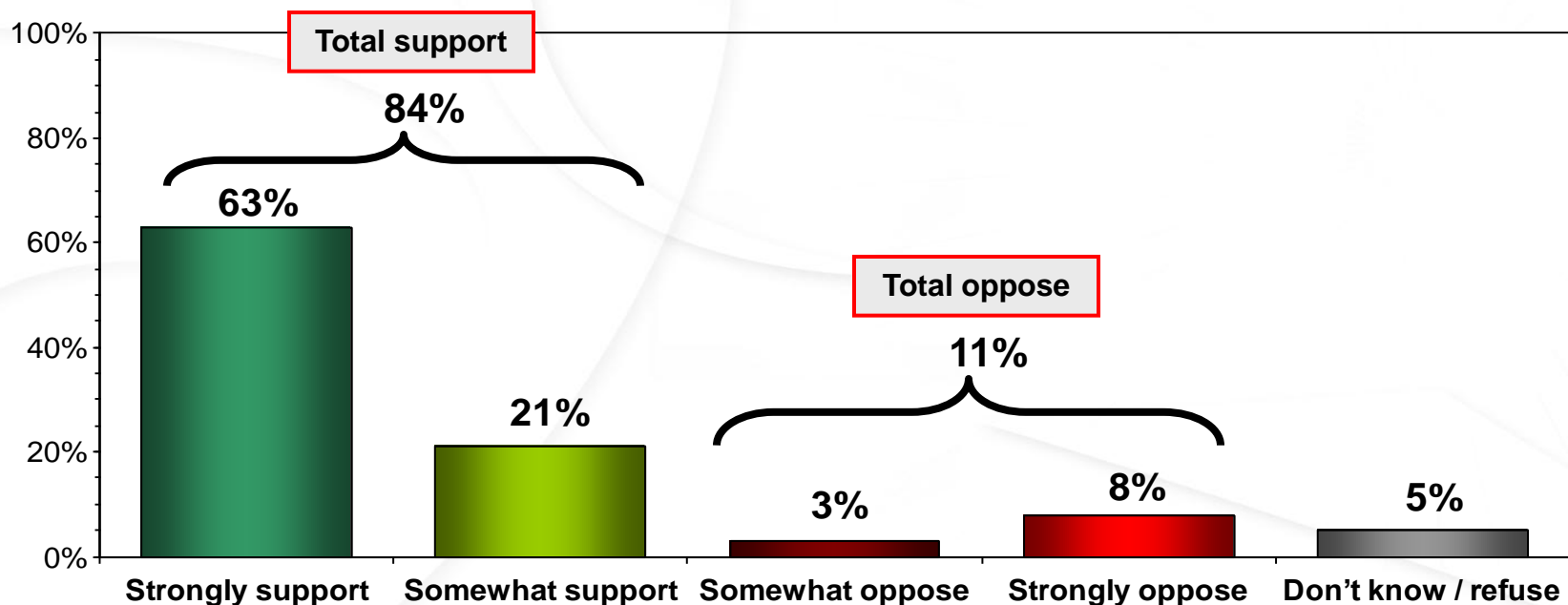
- Three-in-four (73%) residents are familiar with the plan to build wind farms in Essex County, including one-in-five (20%) who are very familiar.
- Those living outside of Windsor have a greater degree of familiarity with the project, with over twice as many very familiar there as in Windsor itself (28% vs. 13%). In total, 66% of Windsor residents are at least somewhat familiar, compared to 82% of those outside Windsor.
- Men (23% very familiar) and residents 55 and over (25% very familiar) tend to be more familiar with this proposal.



Q20. How familiar are you with the proposal to build wind farms in Essex County?

Support for Wind Farm Proposal: *Strong Support*

- Upon being informed of it, a clear majority (63%) of residents strongly support the proposal to build wind farms in Essex County. In total, 84% support the proposal and 11% oppose it.
- A similar number of residents living inside and outside Windsor strongly support (64% and 62%, respectively) and support (84% each) this proposal.
- Men are more likely than women to strongly support the wind farm construction (71% vs. 56%). However, an equal number (8% each) of men and women strongly oppose the project.



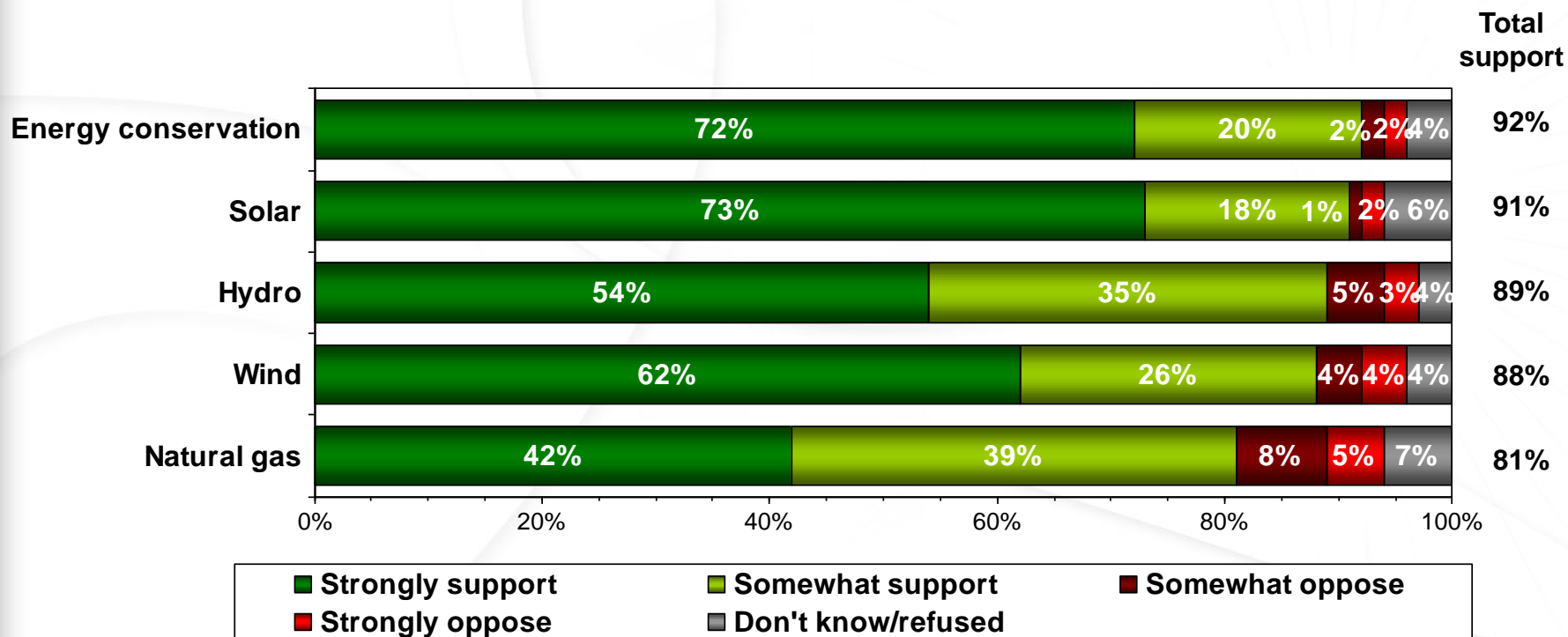
Q21. *The Ontario Power Authority recently approved the construction of 148 wind turbines in Lakeshore and Kingsville, to generate wind power. Would you say you support or oppose this plan? (...) Is that strongly or somewhat support/oppose?*

Scarborough Results

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Support/Oppose Increased Use for Future Electricity Needs (Top Five): *Strong Support for Solar, Wind, Hydro, and Conservation*

- Nine-in-ten Scarborough residents support the increased use of solar (91%), hydro (89%), and wind (88%) power to meet the future electricity needs of Ontario. A similar number (92%) also support an increase in energy conservation programs.
- A majority strongly support the increased use of solar power (73%), energy conservation and efficiency programs (72%), wind power (62%), and hydro electric power (54%).
- Women are more likely than men to strongly support an increase use energy conservation programs (79% vs. 65%).

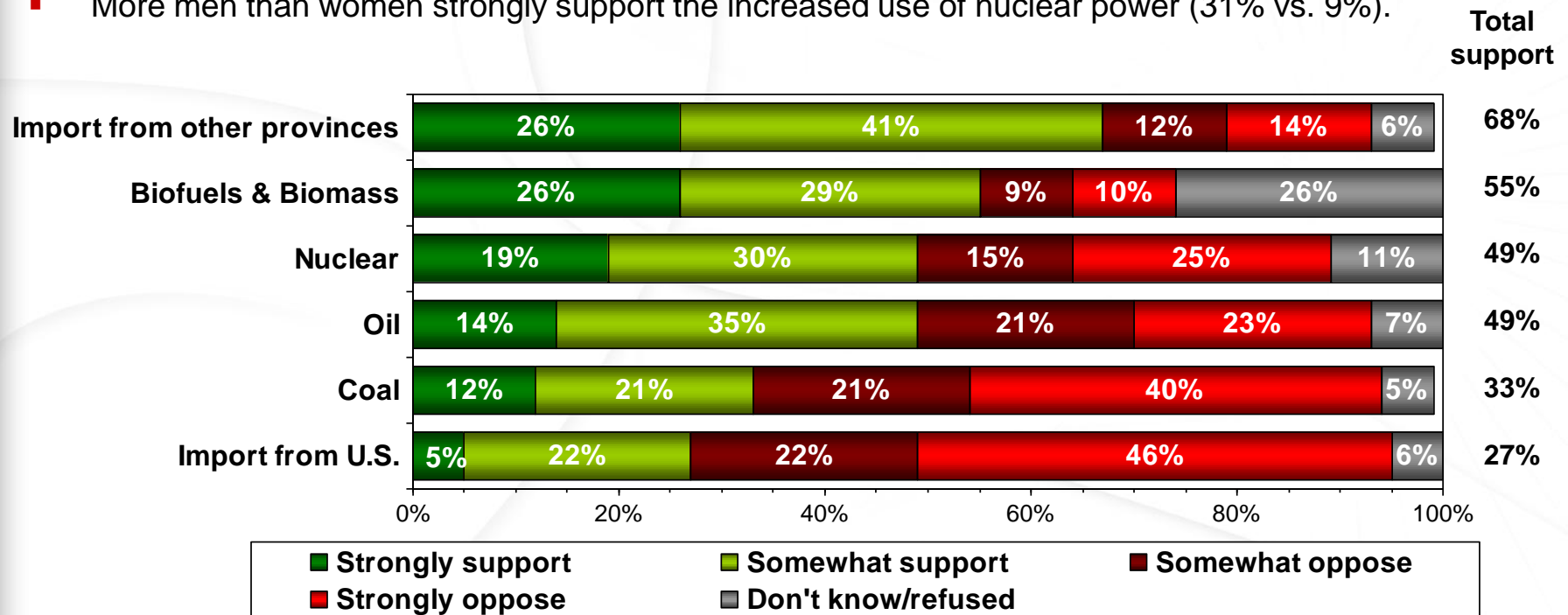


Q1-11.

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

Support/Oppose Increased Use for Future Electricity Needs: *Strong Opposition to Importing from U.S., Coal*

- A majority of Scarborough residents support importing more power from other provinces (68%) and increased biofuel and biomass production (55%), but the support for these is less widespread, and less intense, than for the five previously mentioned energy sources.
- An additional one-in-four (26%) have no opinion on biofuels, indicating a high degree of unfamiliarity with this energy source.
- There is intense opposition to increasing the coal-based power and importing electricity from the U.S., with at least two-in-five residents strongly opposed to either option (40% and 46%, respectively).
- More men than women strongly support the increased use of nuclear power (31% vs. 9%).

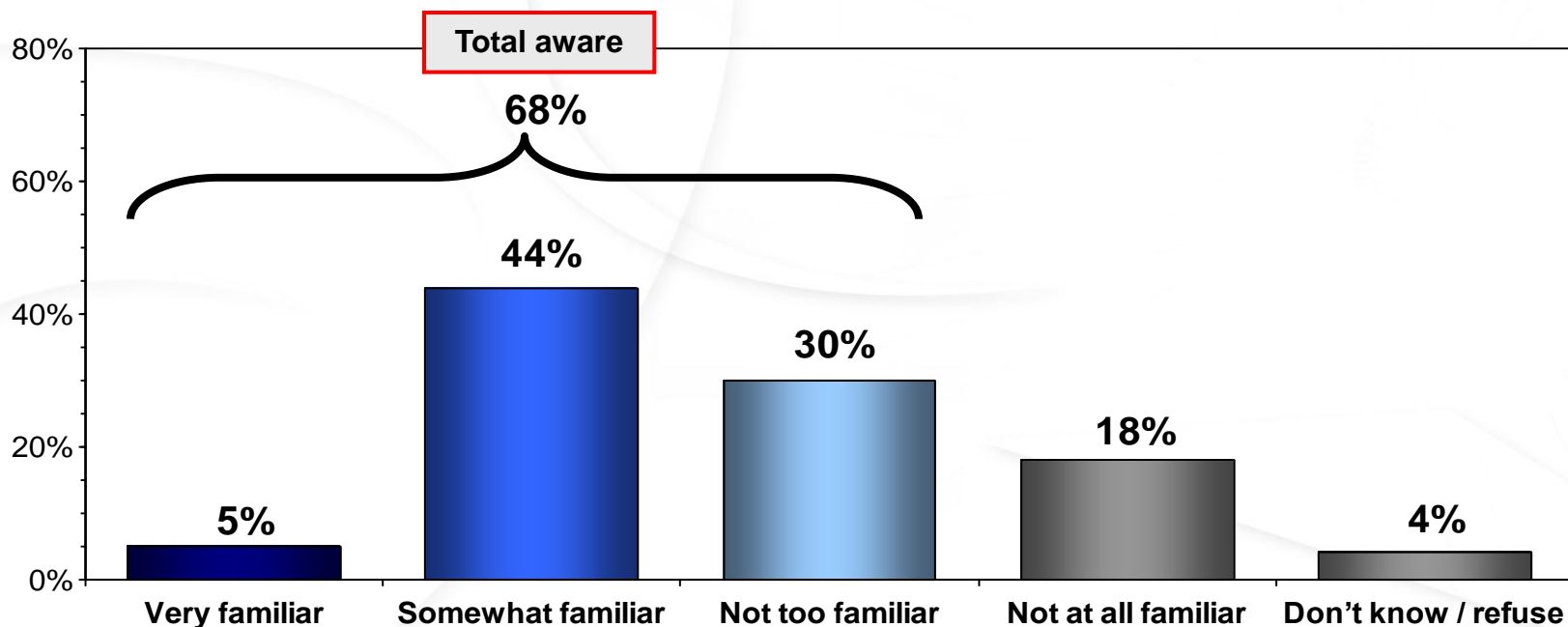


Q1-11.

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

Familiarity with the *Green Energy Act, 2009*: *Two-Thirds Reportedly Aware but Few are Very Familiar*

- Two-thirds (68%) of Scarborough residents are aware of the Ontario government's plans to adopt a Green Energy Act, with close to half (49%) familiar. However, familiarity remains quite superficial, with only 5% considering themselves very familiar with these plans.
- Women are more familiar than men with the GEA plans (53% vs. 44%), while residents 55 years of age and older are more familiar (59%) than younger residents.

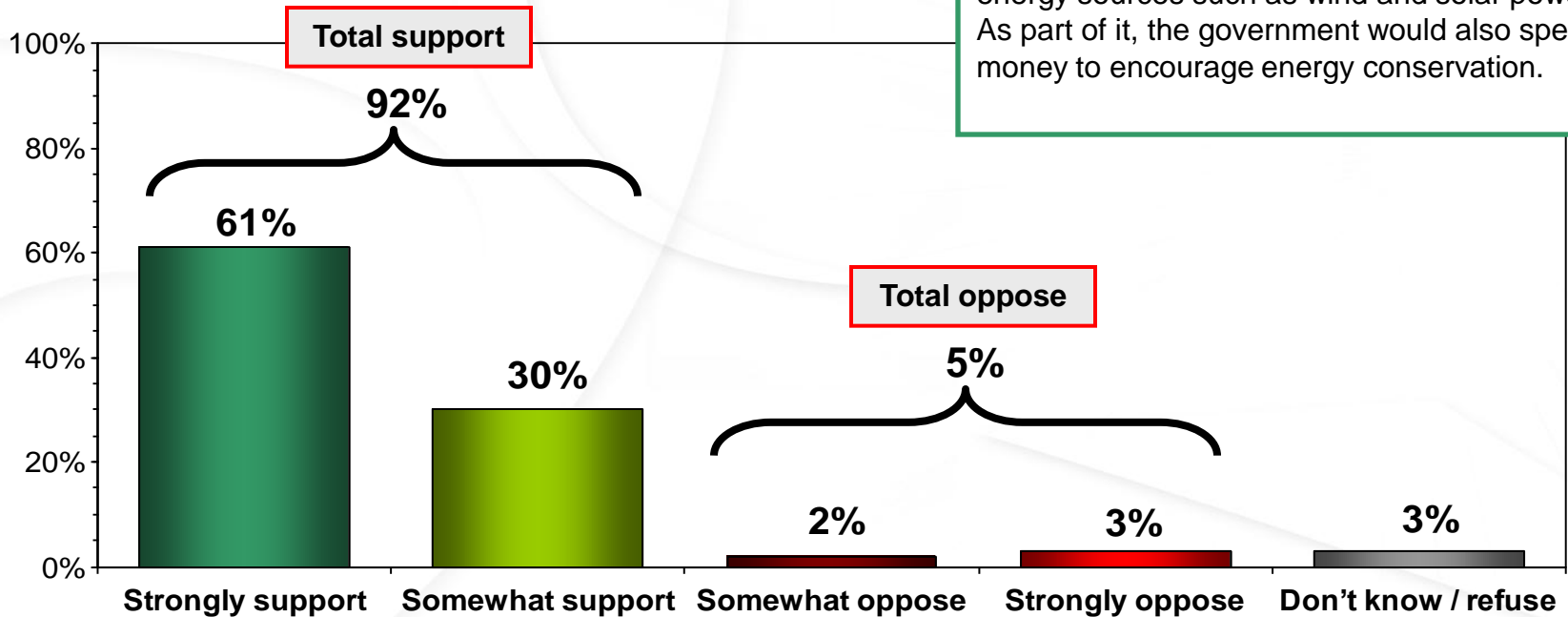


Q12. How familiar are you with the Ontario government's plan to adopt a Green Energy Act?

Support for the *Green Energy Act, 2009:* *Initial Support is Intense, with Few Opponents*

- Over nine-in-ten (92%) Scarborough residents support the GEA at first blush, after being read a short description. This includes six-in-ten residents (61%) who indicate strong support.
- Support is relatively consistent throughout Scarborough, ranging from 90% to 94% in the three regions.

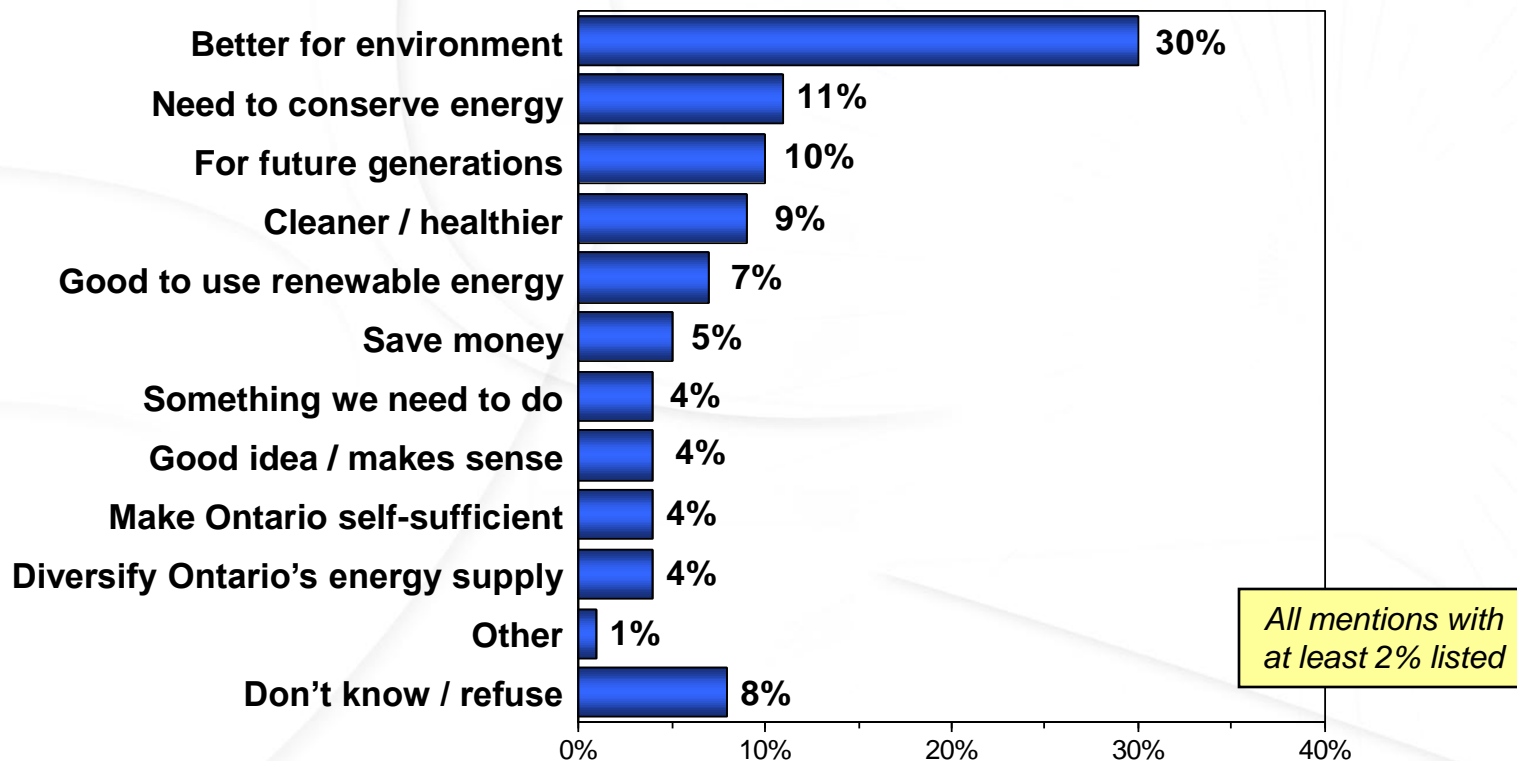
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Q13. *The proposed Green Energy Act would increase the amount of Ontario's electricity supply that is generated by renewable energy sources such as wind and solar power. As part of the government would also spend money to encourage energy conservation. Would you support or oppose the Ontario government adopting this Green Energy Act?*

Reasons for Supporting the GEA: *Environment is Primary Focus*

- Reasons offered for supporting the GEA are widespread, with the most common being that it is good for the environment (30%). Many also point to long-term goals and benefits, such as the need to conserve energy (11%) to look out for future generations (10%), to make Ontario energy self-sufficient (4%), and to diversify the province's energy supply (4%).

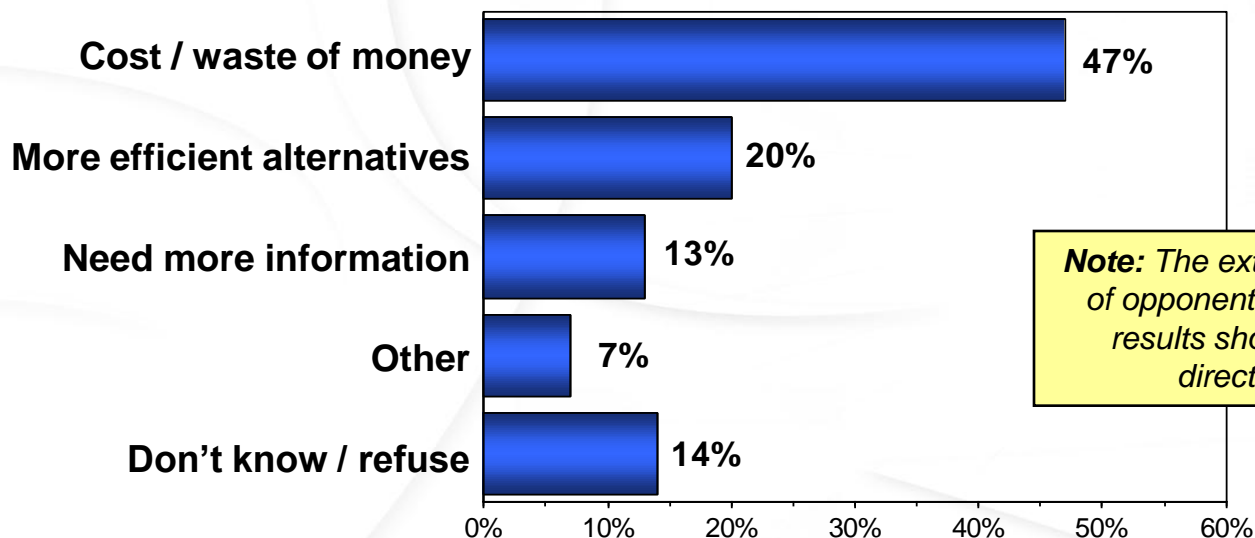


Q14. What would you say is your main reason for supporting the Green Energy Act? (OPEN ENDED. ACCEPT FIRST MENTION)

BASE: SUPPORTERS ONLY

Reasons for Opposing the GEA: *Financial Issues at the Forefront*

- Although it is difficult to infer much from these results given the small sample size, half (47%) of those opposed to the GEA in Scarborough mention costs associated with it as their main objection.



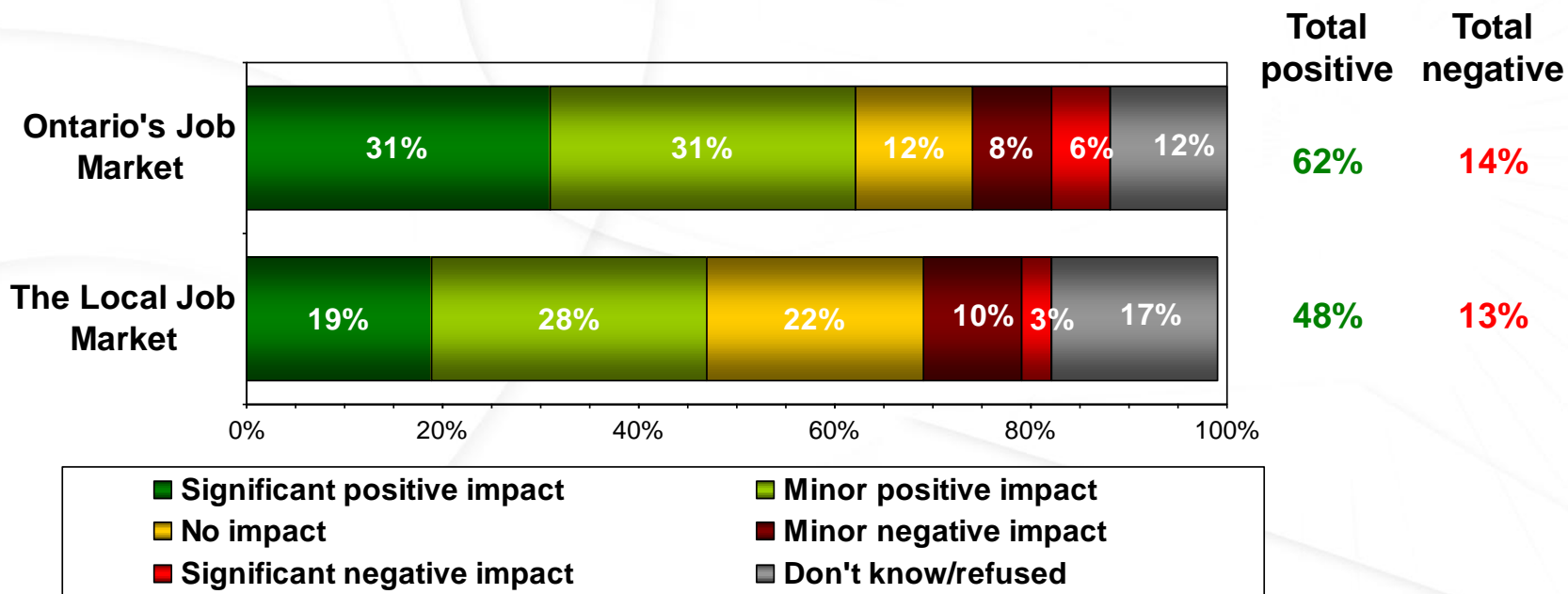
Note: The extremely small sample of opponents (15) means these results should be viewed as directional, at best

Q15. What would you say is your main reason for opposing the Green Energy Act? (OPEN ENDED. ACCEPT FIRST MENTION)

BASE: OPPONENTS ONLY

The GEA's Expected Impact on Job Market: *Moderately Positive; More Positive Impact Across Ontario than in Scarborough*

- Three-in-five (62%) believe the GEA will have a positive impact on Ontario's job market, with half this number (31%) believing it will have a significant positive impact. In comparison, only 14% believe it will negative affect Ontario's job market.
- While Scarborough residents do not believe the GEA will hurt the local job market (13%), they are less convinced that it will be beneficial to their community than they are that it will benefit Ontario as a whole – only 19% believe it will have a significantly positive impact on the local job market.

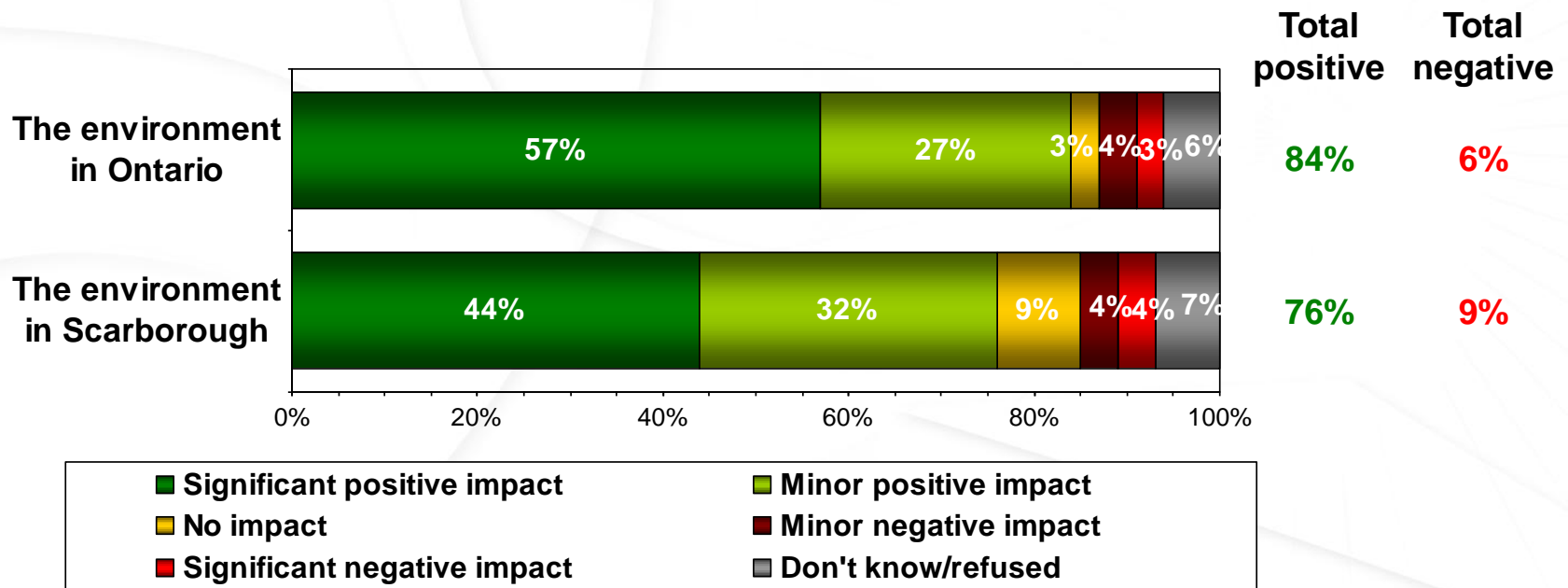


Q16-17.
have

For each of the following, please let me know if you think the Green Energy Act would a negative impact, a positive impact, or no impact at all. (...) Is that a significant or minor positive/negative impact?

The GEA's Expected Impact on the Environment: Highly Positive, more so for Ontario than Scarborough

- Most Scarborough residents believe the GEA will have a positive impact on Ontario's environment (84% positive, 6% negative). This includes 57% who believe it will have a significant positive impact on the province's environment.
- As is the case with its expected impact on the job market, people are less convinced the GEA will positively affect the local environment, with 76% believing it will have a positive impact on Scarborough's environment, including 44% who believe it will have a significant positive impact.
- Women are more likely than men to believe it will have a significant positive impact on Ontario's environment (68% vs. 45%) and the local environment (52% vs. 34%).

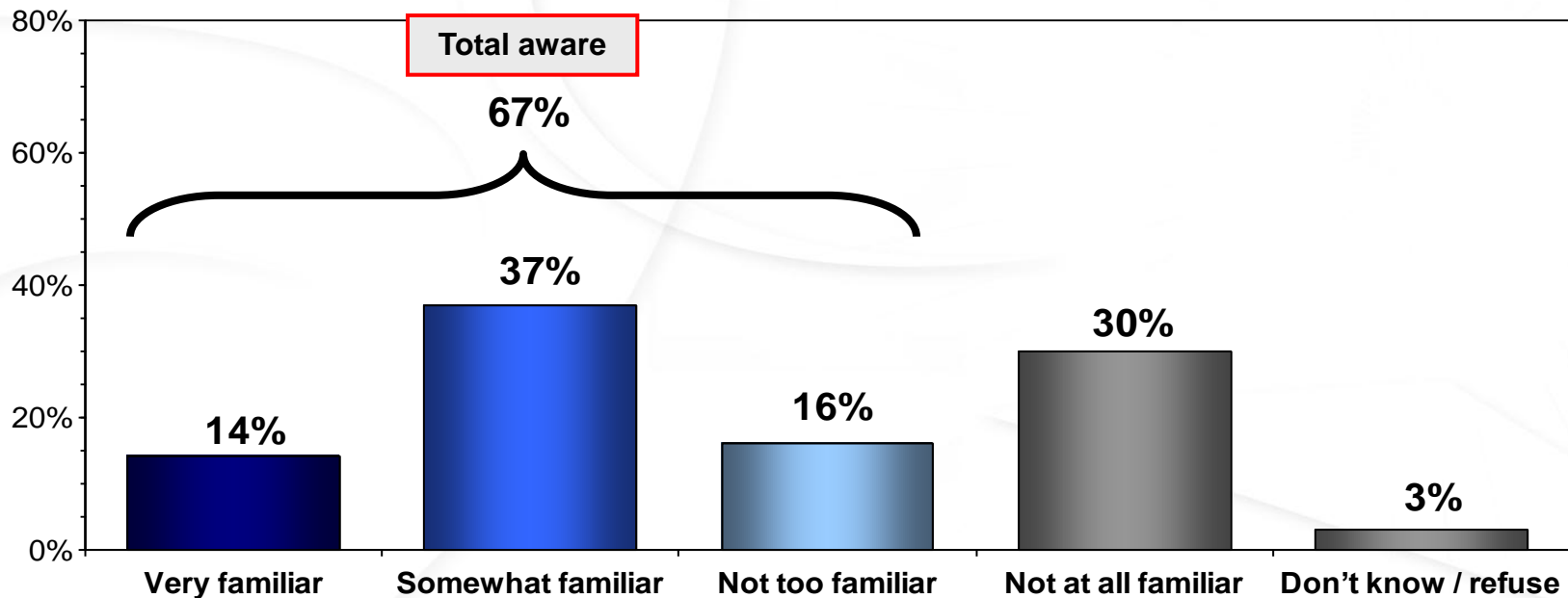


Q18-19.
have

For each of the following, please let me know if you think the Green Energy Act would have a negative impact, a positive impact, or no impact at all. (...) Is that a significant or minor positive/negative impact?

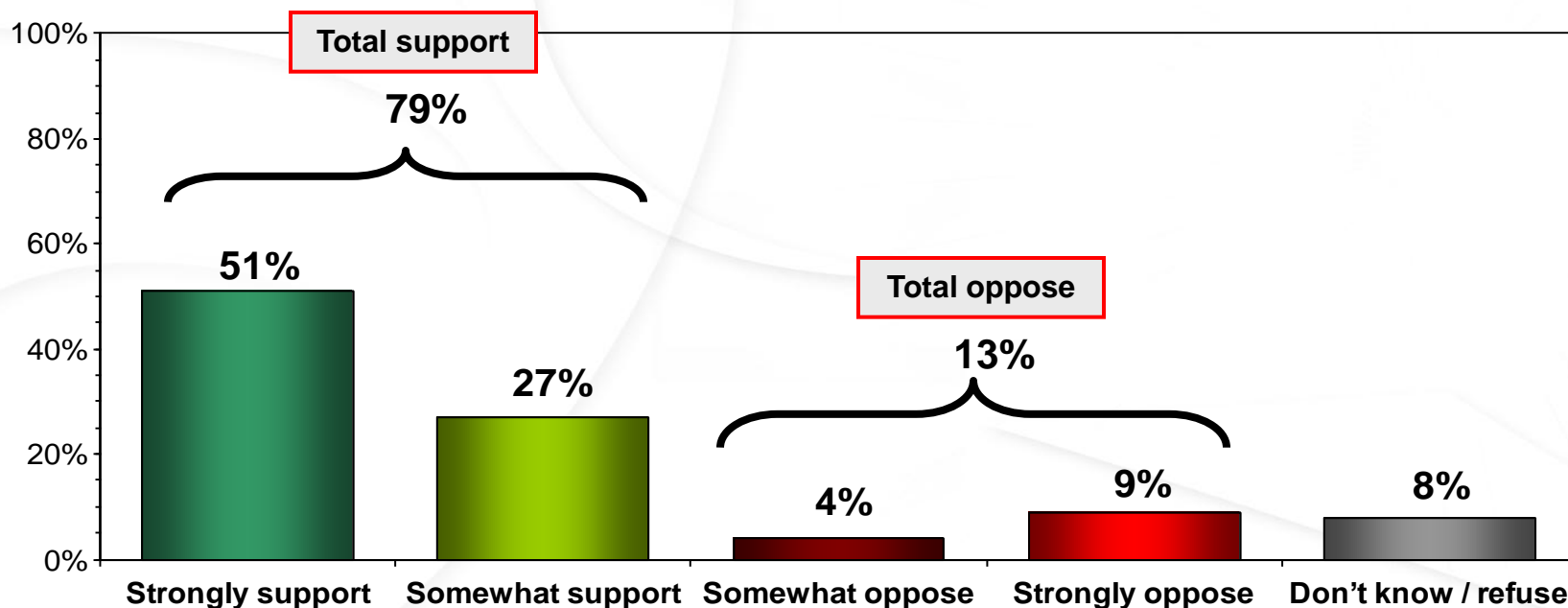
Familiarity with Wind Power Proposal: *Two-Thirds Aware; Few Are Familiar*

- Half (51%) of all residents are familiar with the plan to test the viability of generating wind power off the Scarborough Bluffs, with 14% considering themselves very familiar.
- Proximity to the Bluffs leads to increased familiarity, with 62% of those south of the CNR tracks familiar, 51% of those between the tracks and Highway 401 familiar, and 44% of those north of Highway 401 familiar. One-in-five (21%) south of the tracks are very familiar with the proposal.
- Men (58% familiar) and those 55 and over (67% familiar) are more likely to be familiar with the proposal.



Initial Support for Wind Power Proposal: *Strong Support, with Opposition Concentrated South of CNR Tracks*

- Upon being informed about it, four-in-five (79%) Scarborough residents support the Toronto Hydro proposal, with 13% opposed. Among the strongly opinioned, over five times as many strongly support (51%) as strongly oppose (9%) the plans.
- Support remains high on the waterfront, with three-quarters (76%) of those south of the CNR tracks supporting the project, including 53% who strongly support it. However, strong opposition to the proposal is also concentrated in this region, with 17% of residents there strongly opposed.
- One-in-ten (11%) GEA supporters are opposed to this proposal. At the same time, four-in-ten (40%) GEA opponents at least somewhat supportive of this plan.



Q21. Toronto Hydro has proposed building a wind measuring device two kilometers off the Scarborough shore, in order to test the viability of generating wind power there. Would you say you support or oppose this plan? (...) Is that strongly or somewhat support/oppose?

POLLARA

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