They're at the post . . .

September 2007

Innovative Research Group Inc.
3rd Floor, 350 Bay St.,
Toronto, Ontario
M5H 2S6

What we did . . .

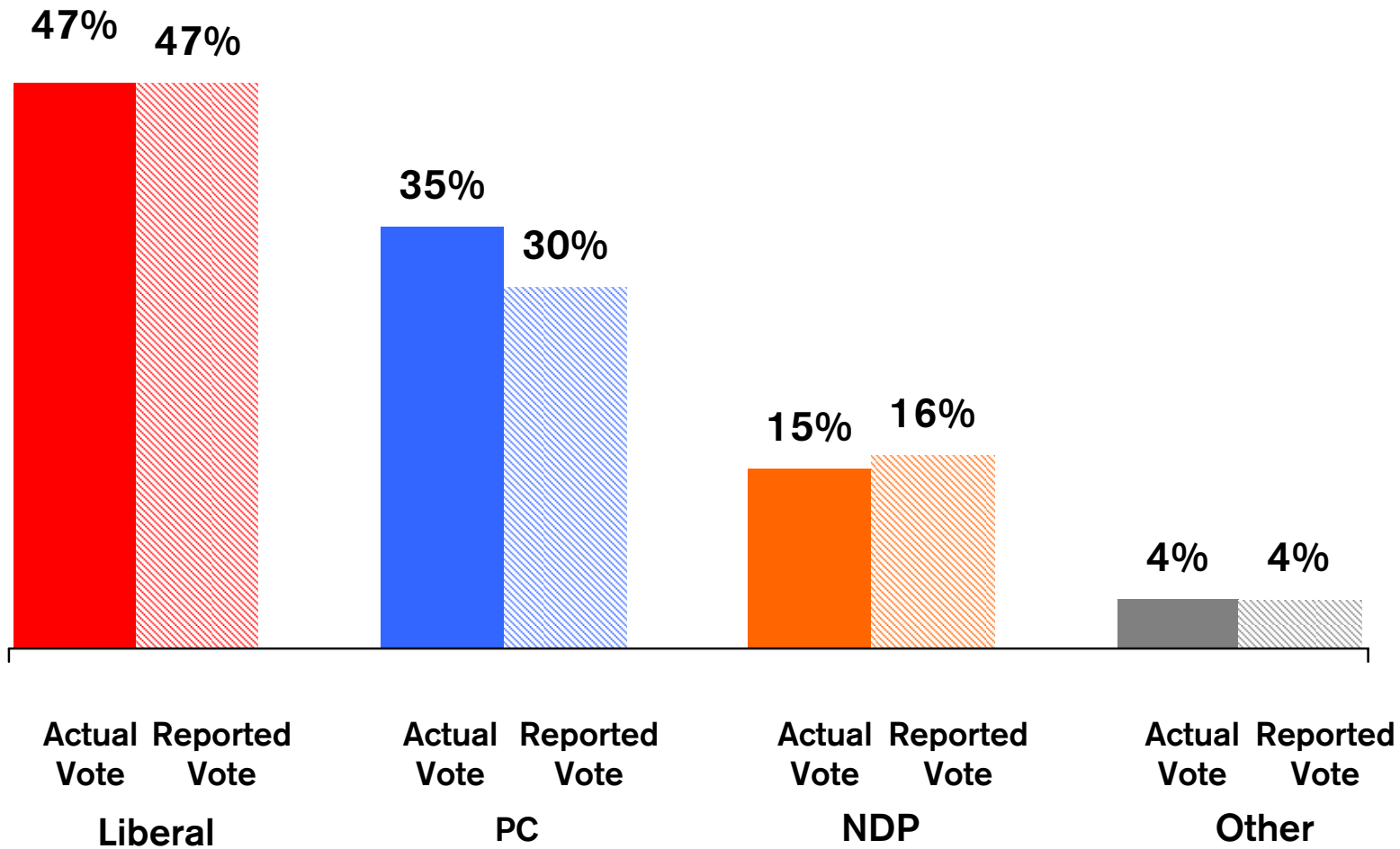# Methodology

- The online survey was conducted among current Ontario members of the INNOVATIVE's Canada 20/20 panel between August 30th and September 5th 2007.

- The study included 1,377 responses eligible for inclusion in our analysis.

- After weighting a sample of this size the aggregated results are considered accurate to within ±2.6 percentage points, 19 times out of 20, of what they would have been had a representative cross-section of Ontarians eligible to vote been polled.

- The margin of error will be larger within each sub-grouping of the sample

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Why Trust Online?

Legend: Liberal, Conservative, NDP, Bloc, Other
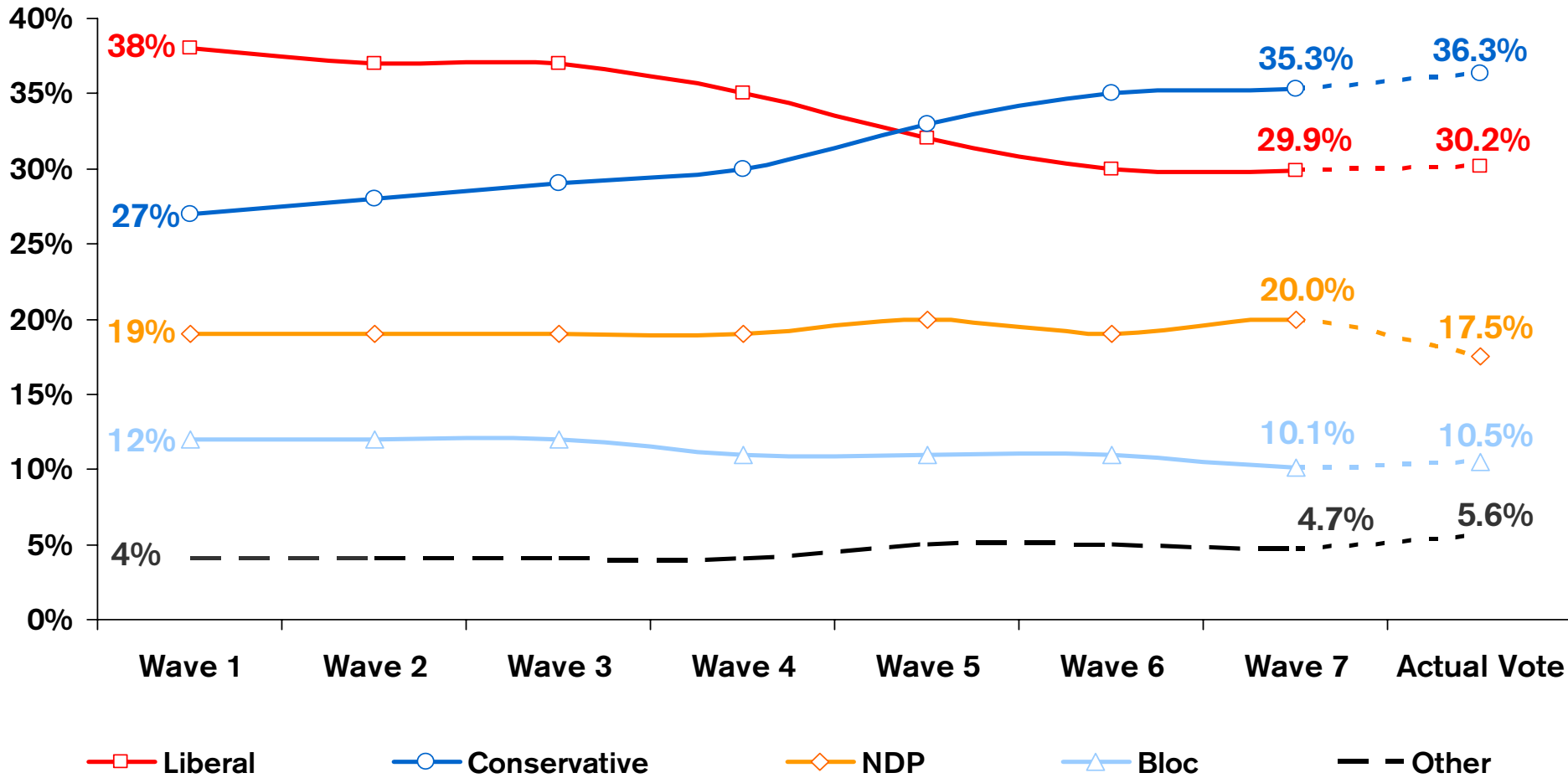
What voters did at the ballot box in 2003… and what voters told us

Election Day Results vs. Reported Vote

	Liberal	PC	NDP	Other
Actual Vote	47%	35%	15%	4%
Reported Vote	47%	30%	16%	4%

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Where are we today?

Election Results vs. Decided Vote Today {Sept. 2007}

	Liberal	PC	NDP	Other
Election 2003 Results	47%	35%	15%	4%
Sept 2007	40%	35%	17%	7%

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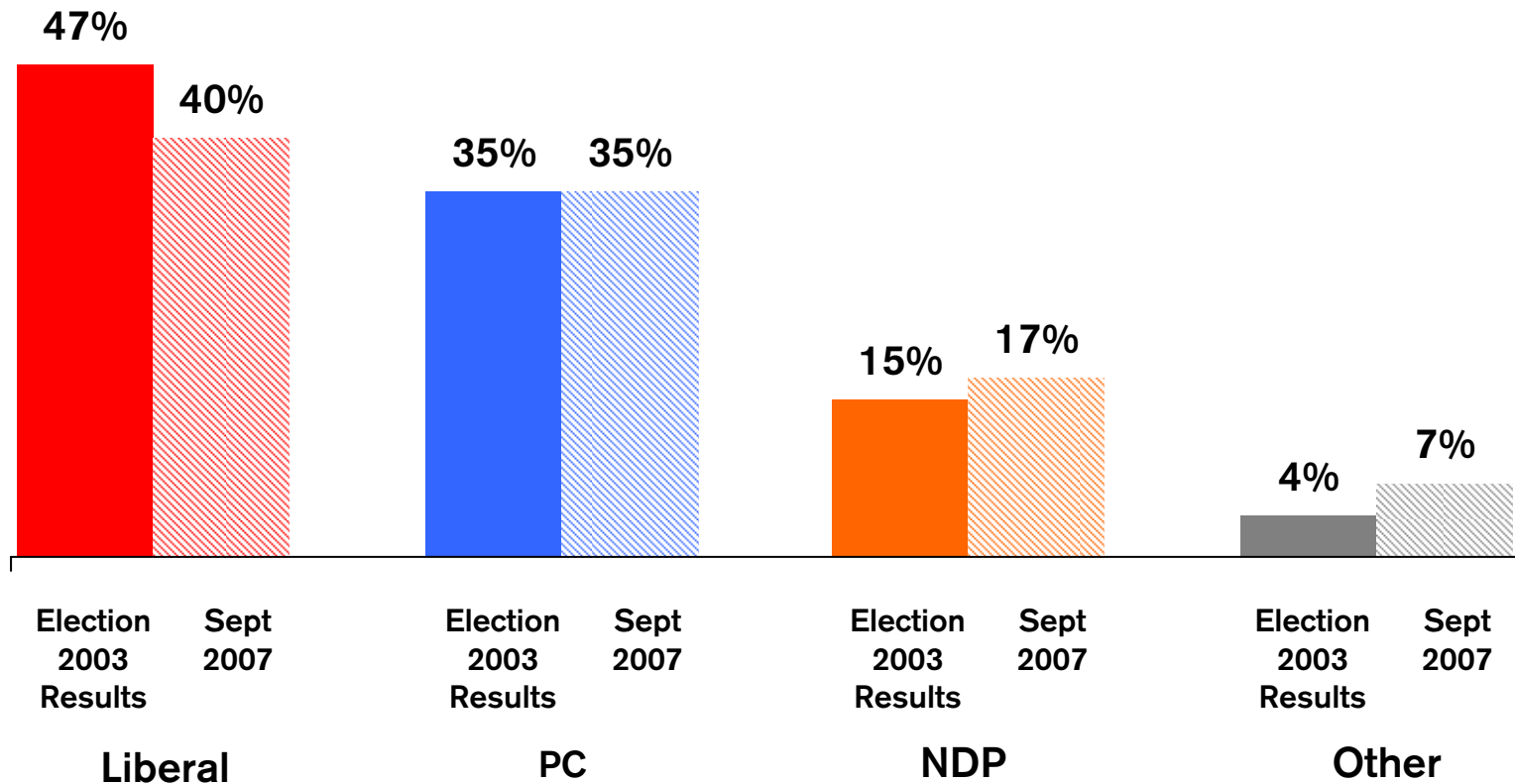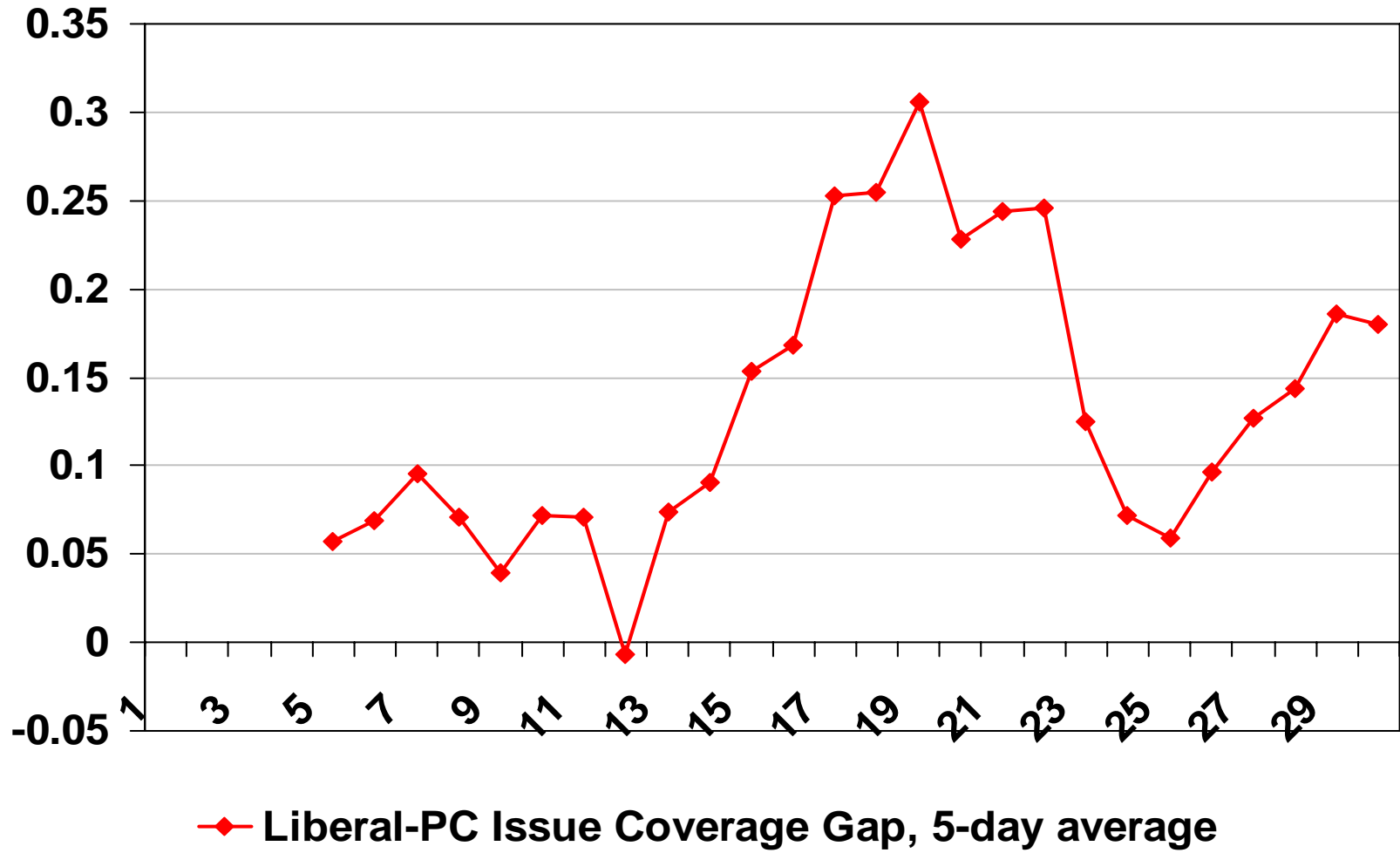
What we are going to show you

- The current Campaign Discourse and its impact on the parties.
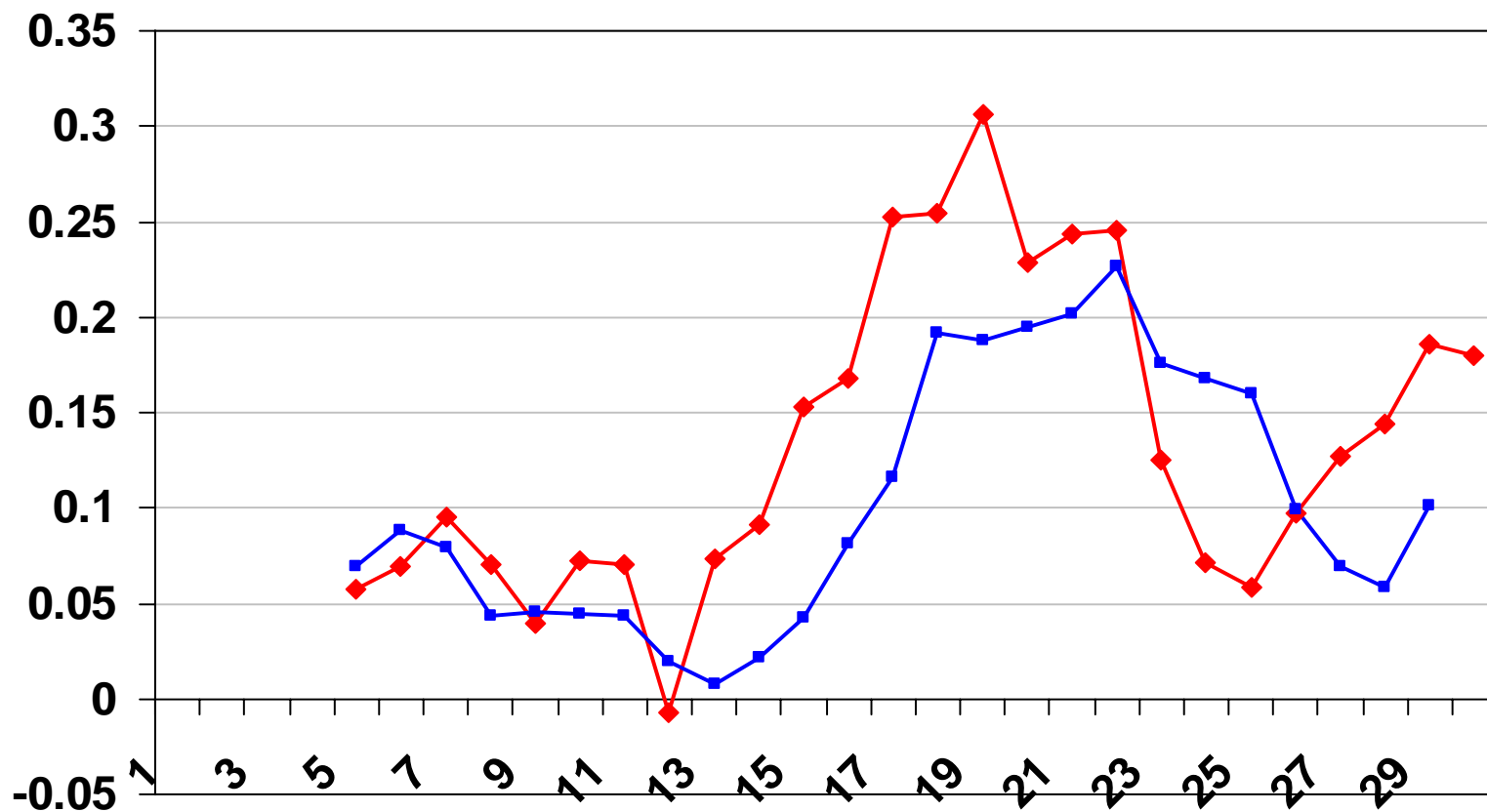
- The image of the party leaders

- The party brands and issue comparisons

- The voter pools

- The general mood and issue matrix

Why does the issue matter?

Liberal-PC Issue Coverage Gap, 5-day average

The issues covered drove the vote in 2003

Legend:
- Liberal-PC Issue Coverage Gap, 5-day average
- Liberal-PC Vote Gap, 5-day average

Provincial Mood

Two-thirds feel province is on right track

Generally speaking, do you feel things in Ontario are going in the right direction, or do you feel things have gotten off on the wrong track? And do you feel strongly or somewhat strongly about that?

Total Right Direction 62%

Total Wrong Track 38%

Strongly right direction	Somewhat right direction	Somewhat wrong track	Strongly wrong track
5%	57%	28%	10%

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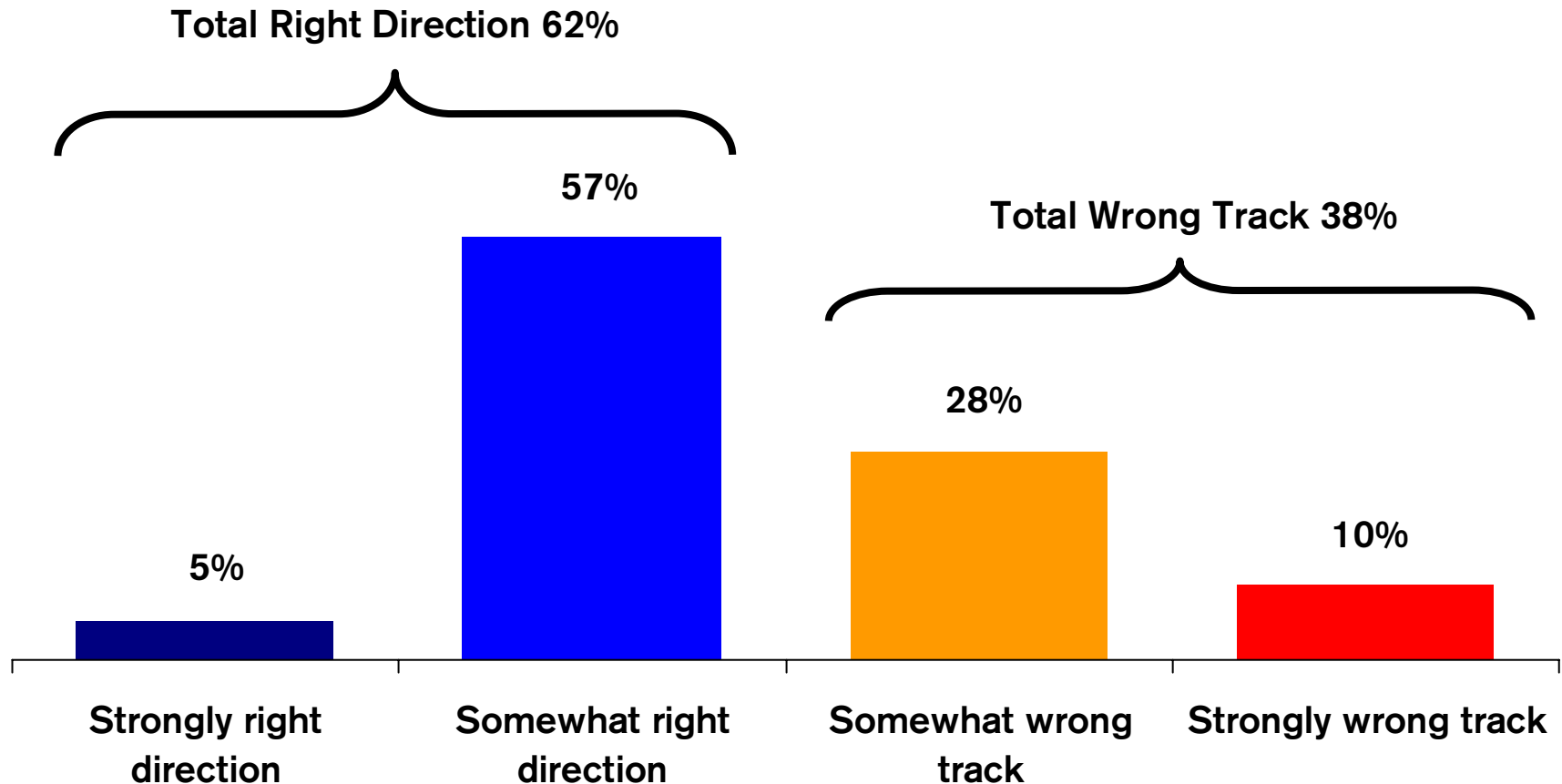
Ontarians split as to whether Liberal policies have made Ontario better or worse [12]

Do you feel that the policies implemented by the current Liberal <u>provincial</u> government since it was first elected in 2003 have made Ontario better or worse overall?

Better 34%

Worse 34%

4%	30%	29%	23%	11%
Much better	Somewhat better	About the same	Somewhat worse	Much worse

Note: 'Don't know' (3%) not shown

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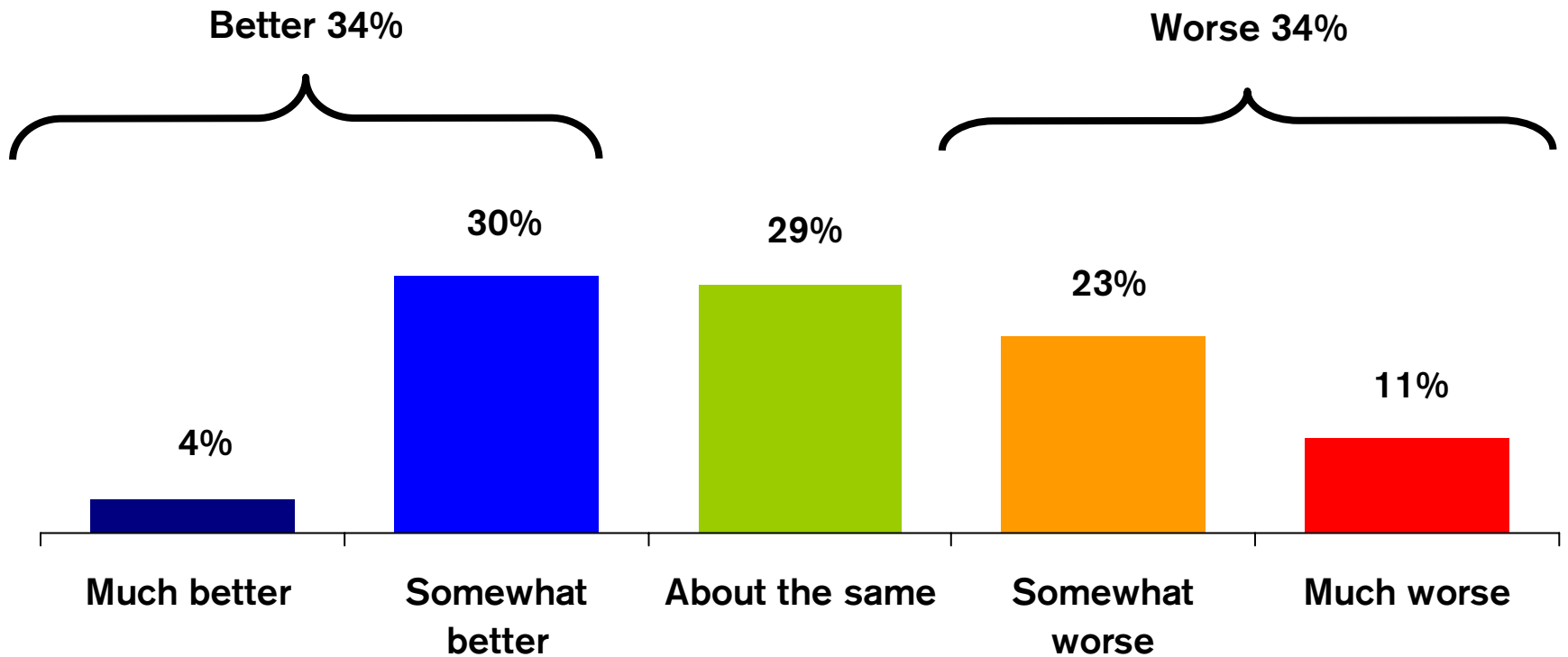
However, plurality feel Ontario will be worse off in 5 years if Liberals are re-elected

In your opinion, if the current <u>provincial</u> government is re-elected and continues its policies, do you think Ontario will be better off or worse off in five years time, that is, in 2012, than it is today?

Better 27%

Worse 38%

Much better off	Somewhat better off	About the same	Somewhat worse off	Much worse off
4%	23%	30%	20%	18%

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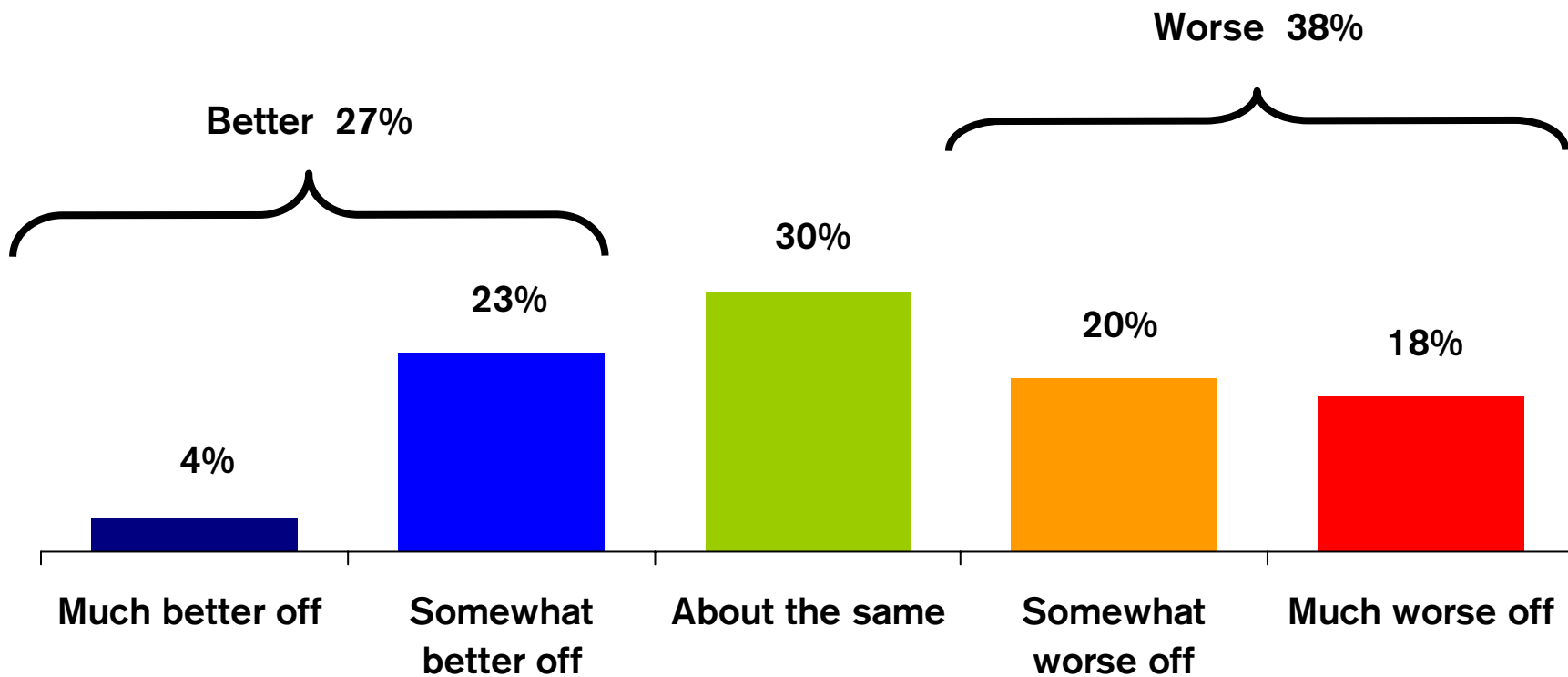
Slim majority say it is time for a change in government in Ontario

Do you agree or disagree with the following statements? *It is time for a change in government here in Ontario*

Agree 52%

Disagree 27%

35%

17%

19%

14%

13%

Strongly agree   **Somewhat agree**   **Neither agree nor disagree**   **Somewhat disagree**   **Strongly disagree**
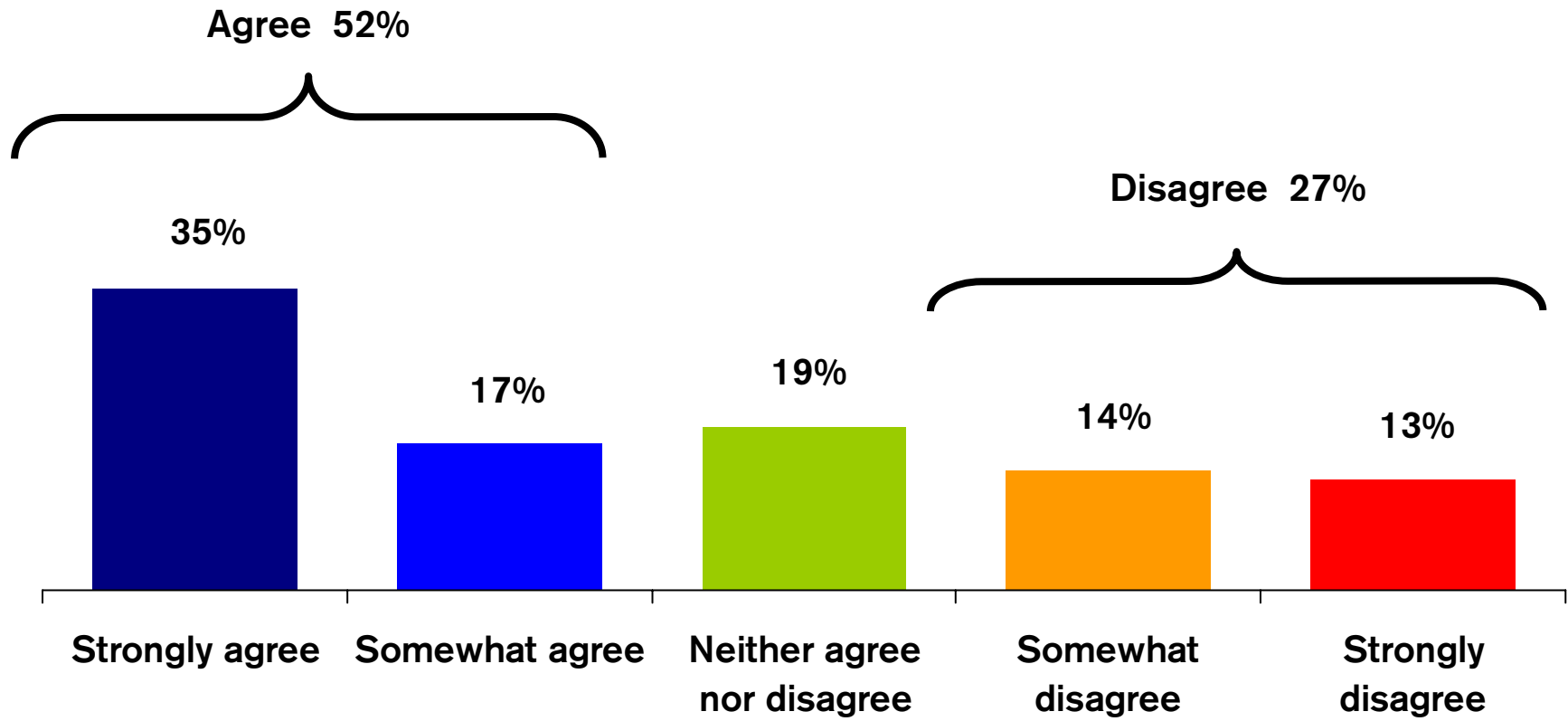
Note: 'Don't know' (4%) not shown

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Issue matrix

Health care tops list of ballot factors for Ontarians

As you think about the upcoming provincial election on October 10th, what one factor is most important to you as you make up your mind as to who you will vote for?

All Ontarians

Factor	Percent
Health care	16%
Integrity/Keeping promises/Honesty	11%
Environmental issues/plan	8%
Taxes	7%
Education	7%
Economic issues/plan	5%
Faith based school funding	4%
Fiscal management/balanced budget	3%

Note: 'Issues <3% not shown

Note: 'Don't know' (3%) not shown

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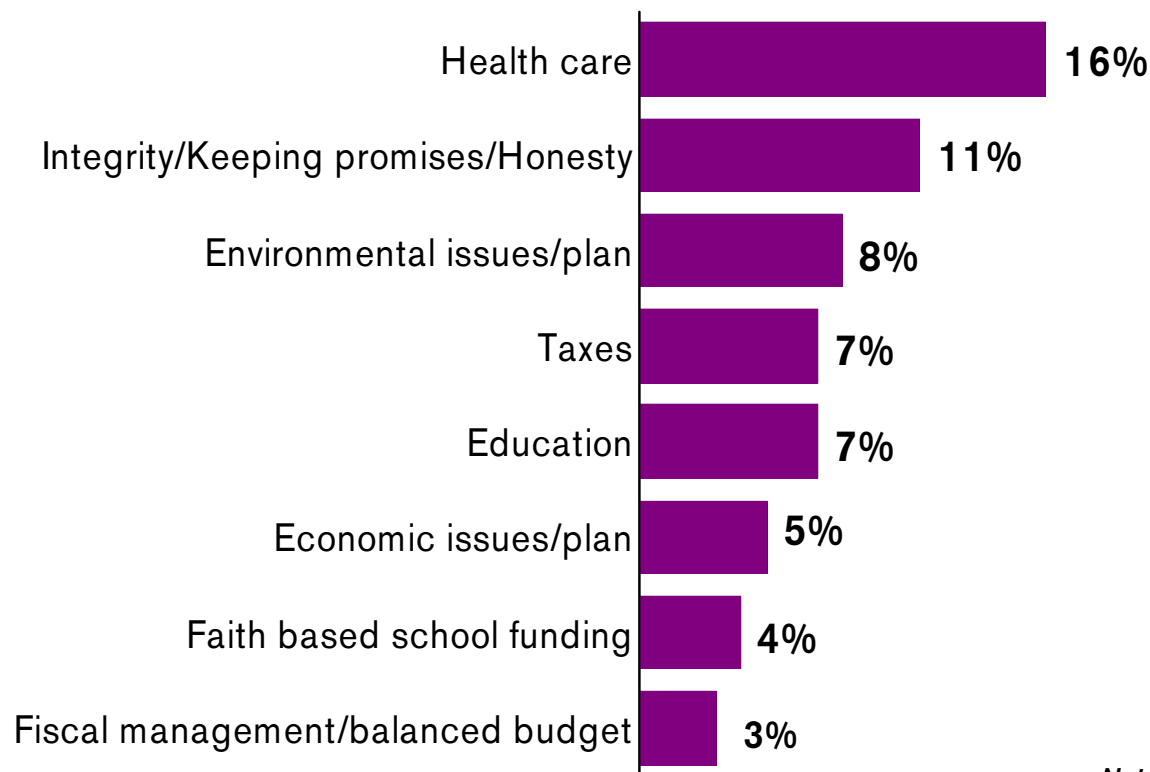# Keeping promises/integrity top list of ballot factors[17] for Tory voters

As you think about the upcoming provincial election on October 10th, what one factor is most important to you as you make up your mind as to who you will vote for?

Conservative Supporters

Factor	Percentage
Integrity/Keeping promises/Honesty	**21%**
Taxes	**13%**
Health care	**10%**
Economic issues/plan	**8%**
Fiscal management/balance budgets	**5%**
Crime/Justice	**5%**
Vote against Liberals	**5%**
Faith based school funding	**4%**
Leadership	**3%**
Plan/Platform	**3%**
Education	**3%**

Note: 'Issues <3% not shown

Note: 'Don't know' (2%) not shown

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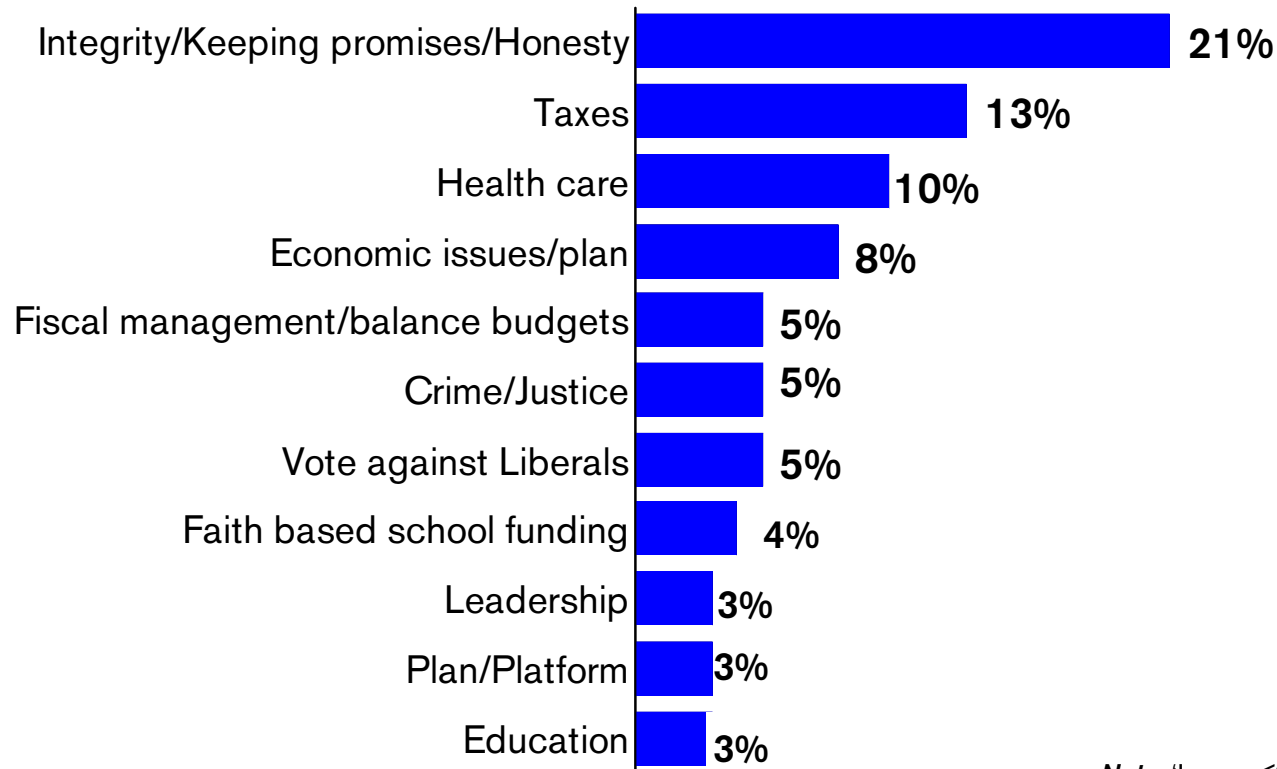
Health care, education and environment top Liberal supporters ballot factors

As you think about the upcoming provincial election on October 10th, what one factor is most important to you as you make up your mind as to who you will vote for?

Liberal Supporters

Factor	Percentage
Health care	18%
Education	11%
Environmental issues/plan	9%
Economic issues/plan	6%
Integrity/Keeping promises/Honesty	5%
Voting against PCs	5%
Ubran issues/city funding	4%
Faith based school funding	4%
Fiscal management/balance budget	3%
Plan/Platform	3%
Public transportation/gridlock	3%
Taxes	3%
Jobs	3%
Local candidate	3%

Note: 'Issues <3% not shown

Note: 'Don't know' (2%) not shown

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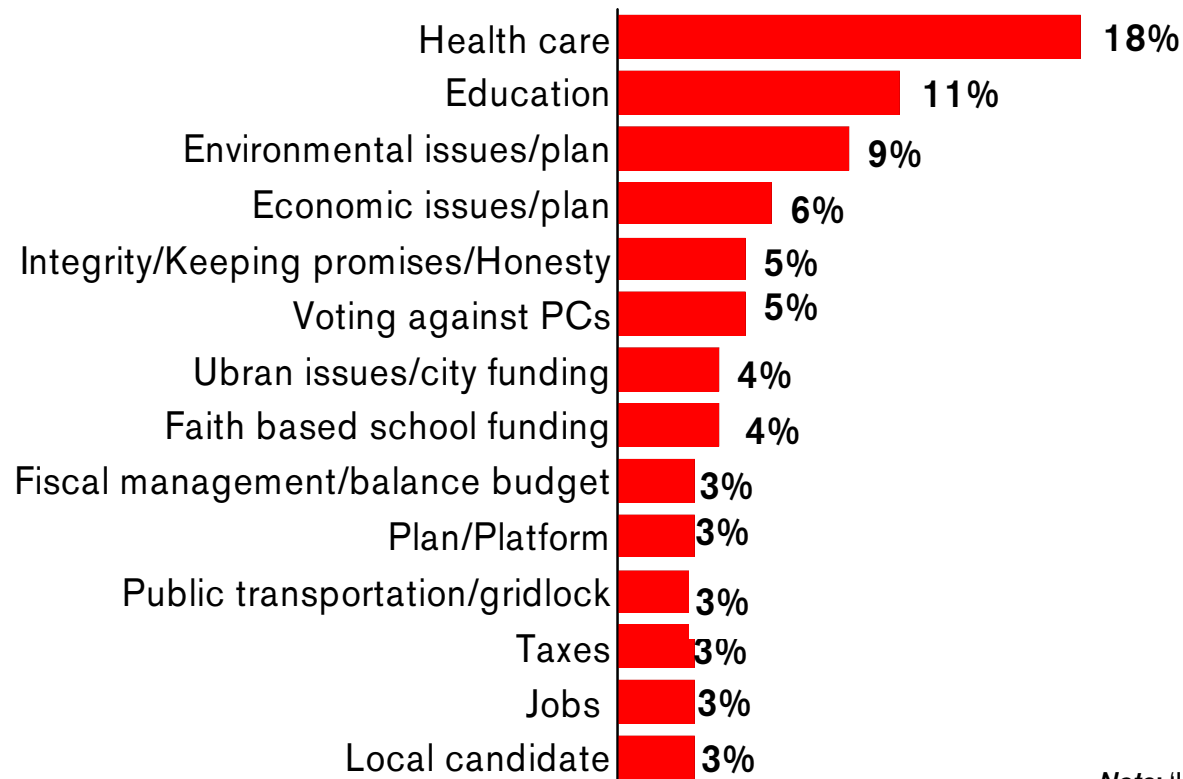
Health care, environment and social issues most important for NDP supporters

As you think about the upcoming provincial election on October 10th, what one factor is most important to you as you make up your mind as to who you will vote for?

NDP Supporters

Factor	Percentage
Health care	21%
Environmental issues/plan	14%
Social issues	9%
Education	6%
Integrity/Keeping promises/Honesty	4%
Taxes	4%
Local candidate	3%

Note: 'Issues <3% not shown

Note: 'Don't know' (2%) not shown

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Health care top issues for undecided voters

As you think about the upcoming provincial election on October 10th, what one factor is most important to you as you make up your mind as to who you will vote for?

Undecided

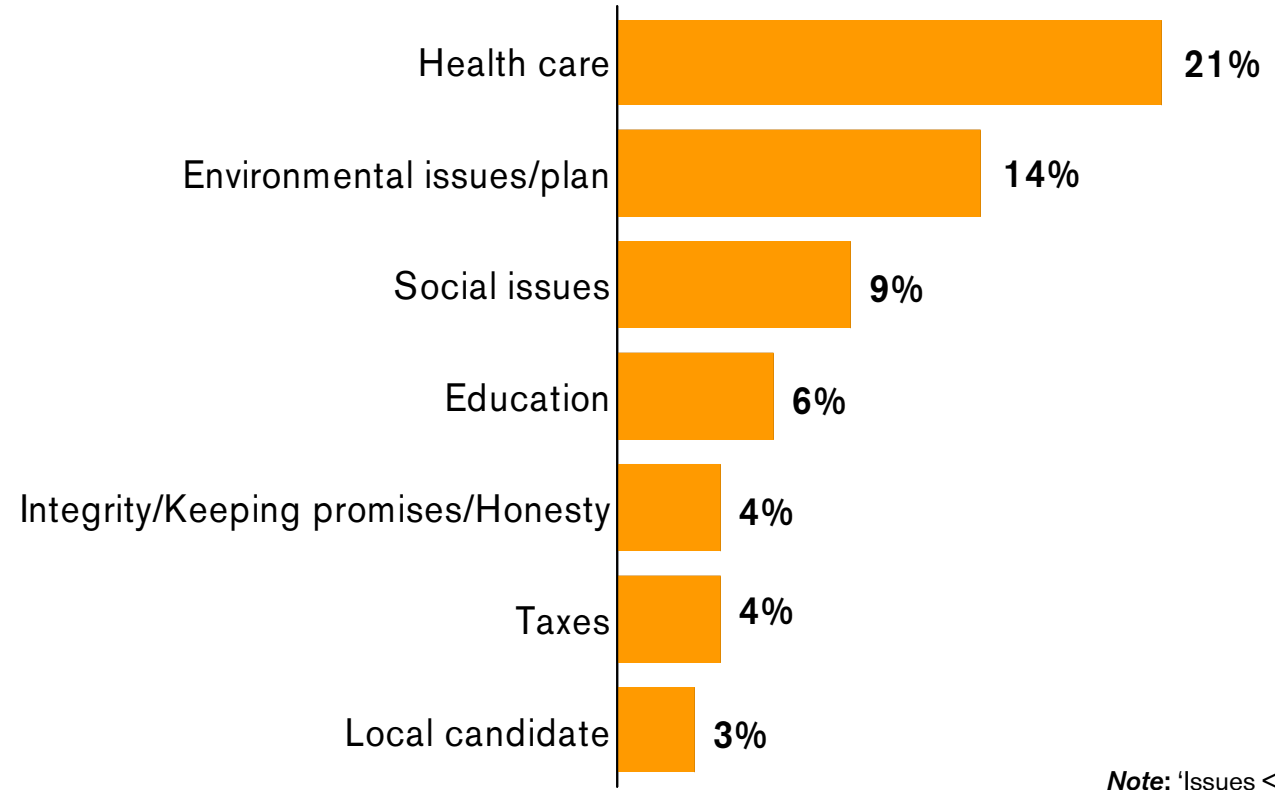| Issue	Percentage
Health care	25%
Environmental issues/plan	9%
Integrity/Keeping promises/Honesty	9%
Taxes	9%
Urban issues/funding for cities	5%
Education	4%
Government accountibility	3%
Jobs	3%
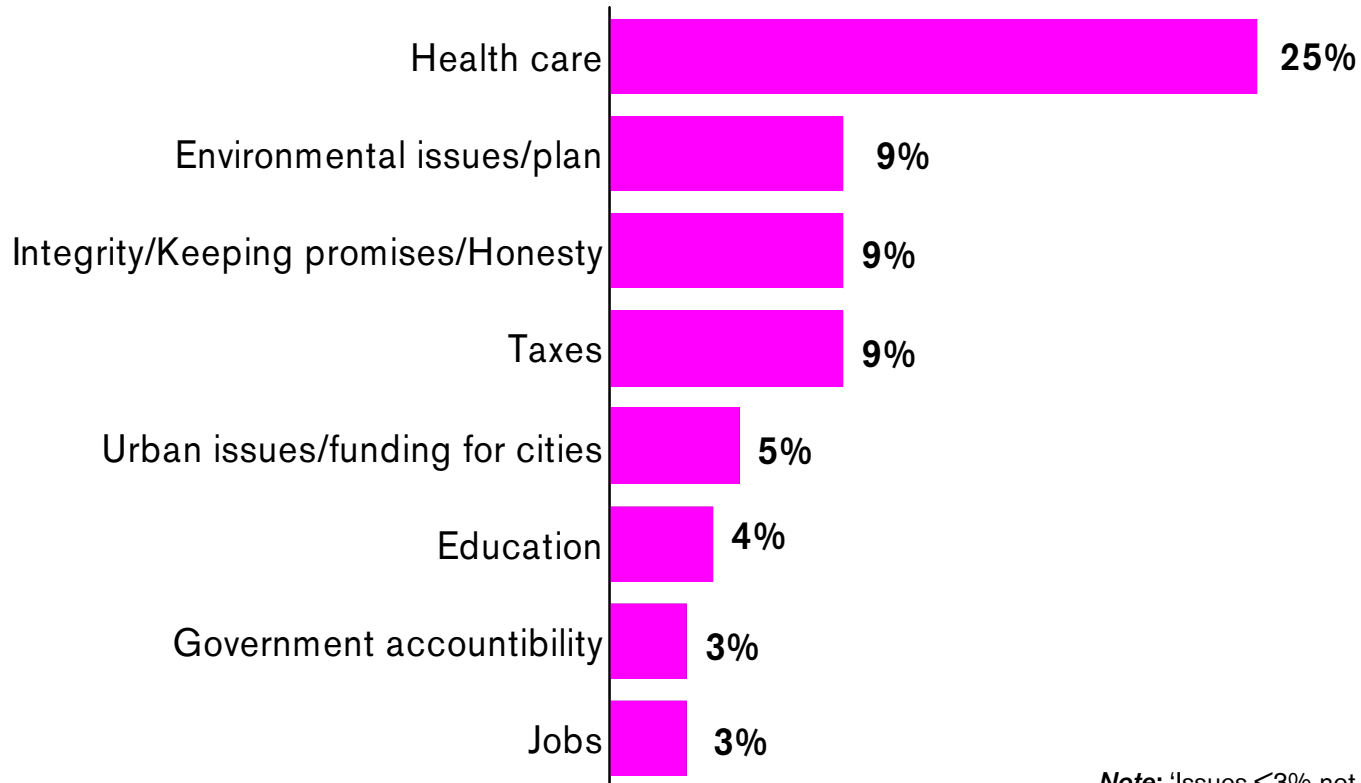
Note: 'Issues <3% not shown

Note: 'Don't know' (11%) not shown

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Health Care viewed as more important than other issues in deciding vote in election

Now we are going to provide you with a series of issues. For each issue, please tell me how important that issue is to you personally as you make up your mind in this election? Will it be ....
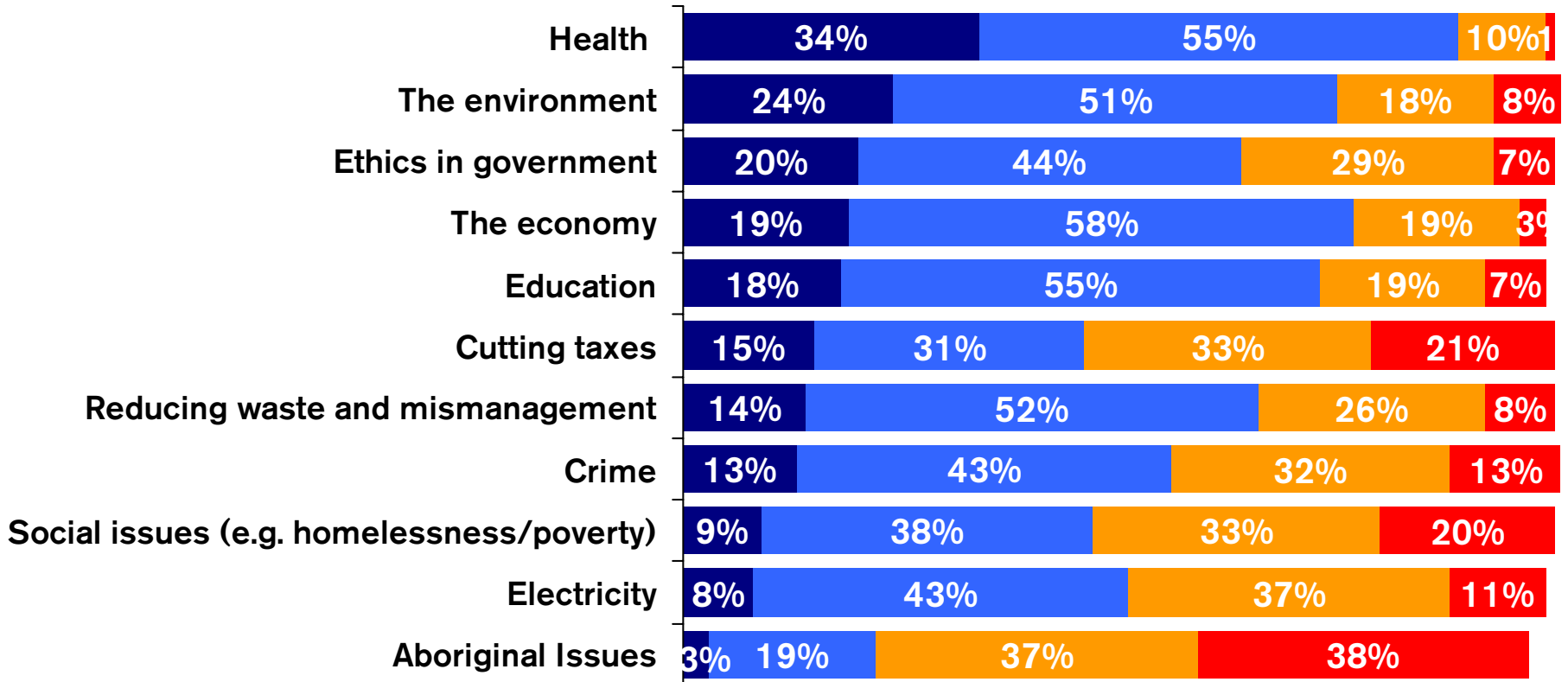
Issue	More important than any other issue	One of the most important issues	Only somewhat important	Not really an issue
Health	34%	55%	10%	1
The environment	24%	51%	18%	8%
Ethics in government	20%	44%	29%	7%
The economy	19%	58%	19%	3%
Education	18%	55%	19%	7%
Cutting taxes	15%	31%	33%	21%
Reducing waste and mismanagement	14%	52%	26%	8%
Crime	13%	43%	32%	13%
Social issues (e.g. homelessness/poverty)	9%	38%	33%	20%
Electricity	8%	43%	37%	11%
Aboriginal Issues	3%	19%	37%	38%

■ More important than any other issue   ■ One of the most important issues
■ Only somewhat important   ■ Not really an issue

"Don't know" / "refused" not shown

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Party Voter Pools

Where are we today?

Election Results vs. Decided Vote Today {Sept. 2007}

	Liberal	PC	NDP	Other
Election 2003 Results	47%	35%	15%	4%
Sept 2007	40%	35%	17%	7%

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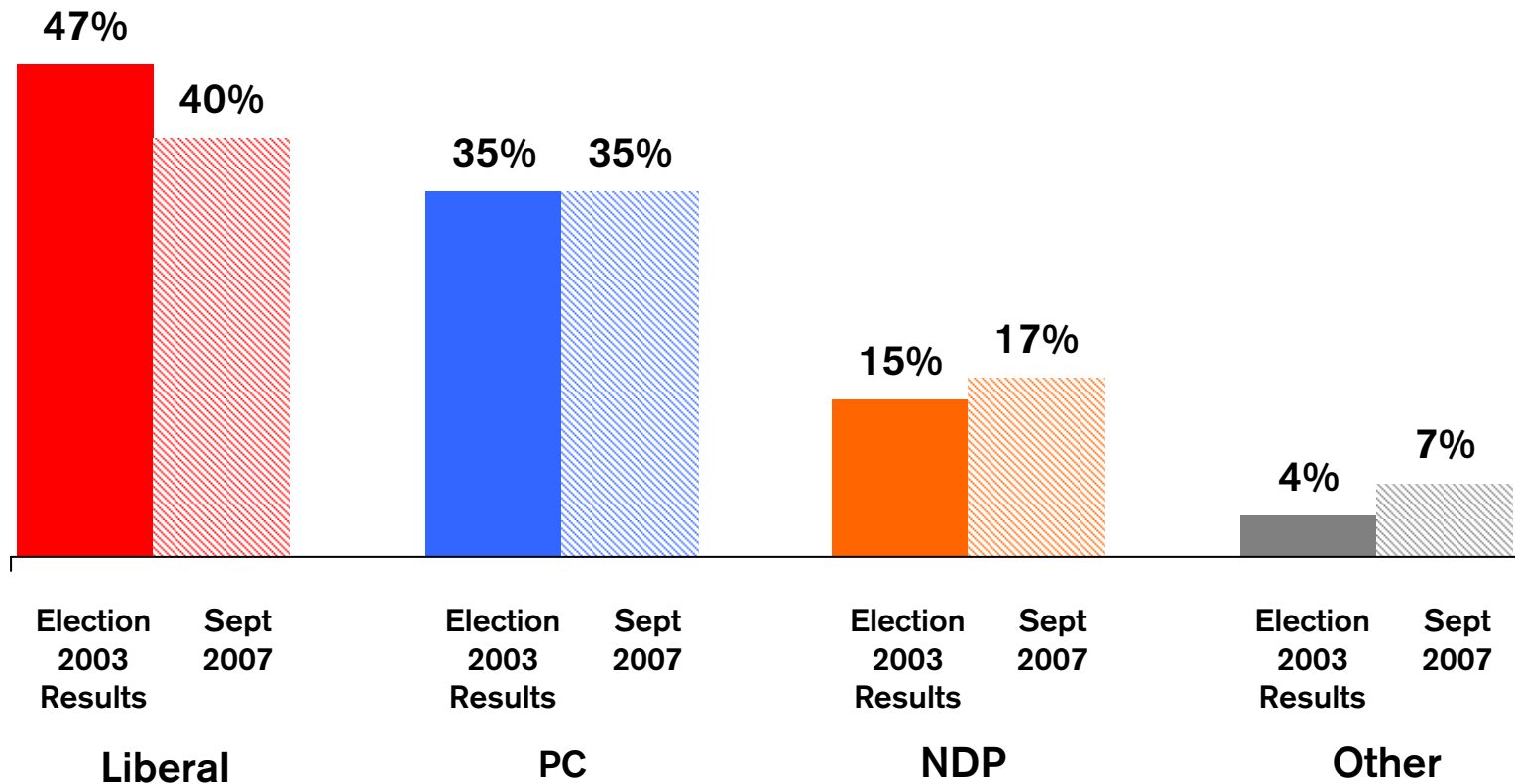
How parties think

Each campaign has two jobs:

- **To convince voters to support their party**
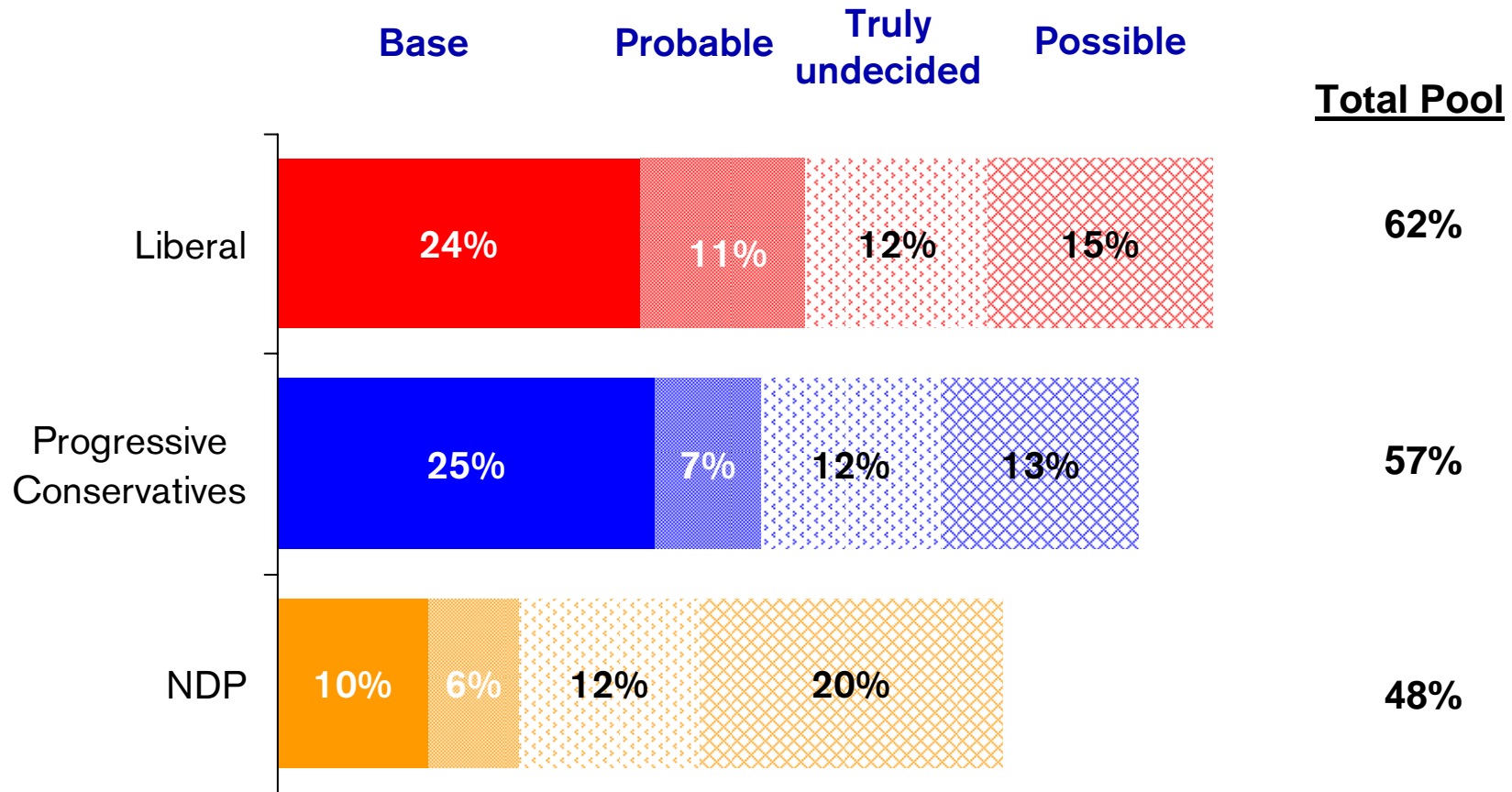
- **To convince supporters to vote**

	Support	Undecided	Opposed
Likely to vote			
Not likely to vote			

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Second choice X Initial vote

	Liberal – 1st choice	PC – 1st choice	NDP – 1st choice
Liberal – 2nd choice		22%	41%
PC – 2nd choice	25%		10%
NDP – 2nd choice	38%	14%	
Another Party – 2nd choice	11%	11%	15%
Undecided	20%	30%	29%
None	5%	23%	5%

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Liberals have largest voter pool

	Base	Probable	Truly undecided	Possible	Total Pool
Liberal	24%	11%	12%	15%	62%
Progressive Conservatives	25%	7%	12%	13%	57%
NDP	10%	6%	12%	20%	48%

Note: 'Don't know' not shown

Party Brands

Party ID anchors voter preferences

Little Red Boat
* Voter preference

1 Sometimes the lines are tight...

Anchors
* Party ID

2 ... and sometimes the lines are loose
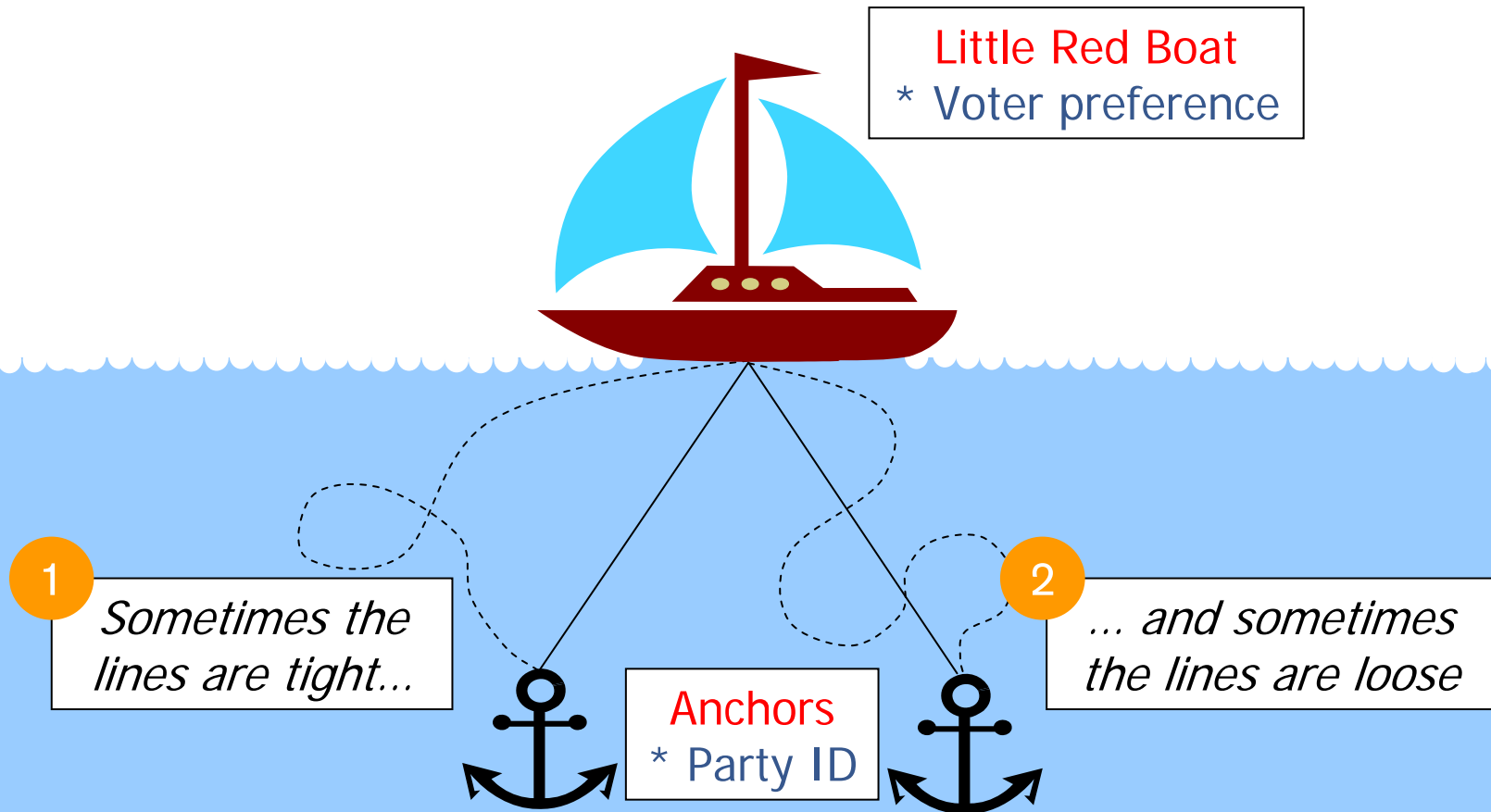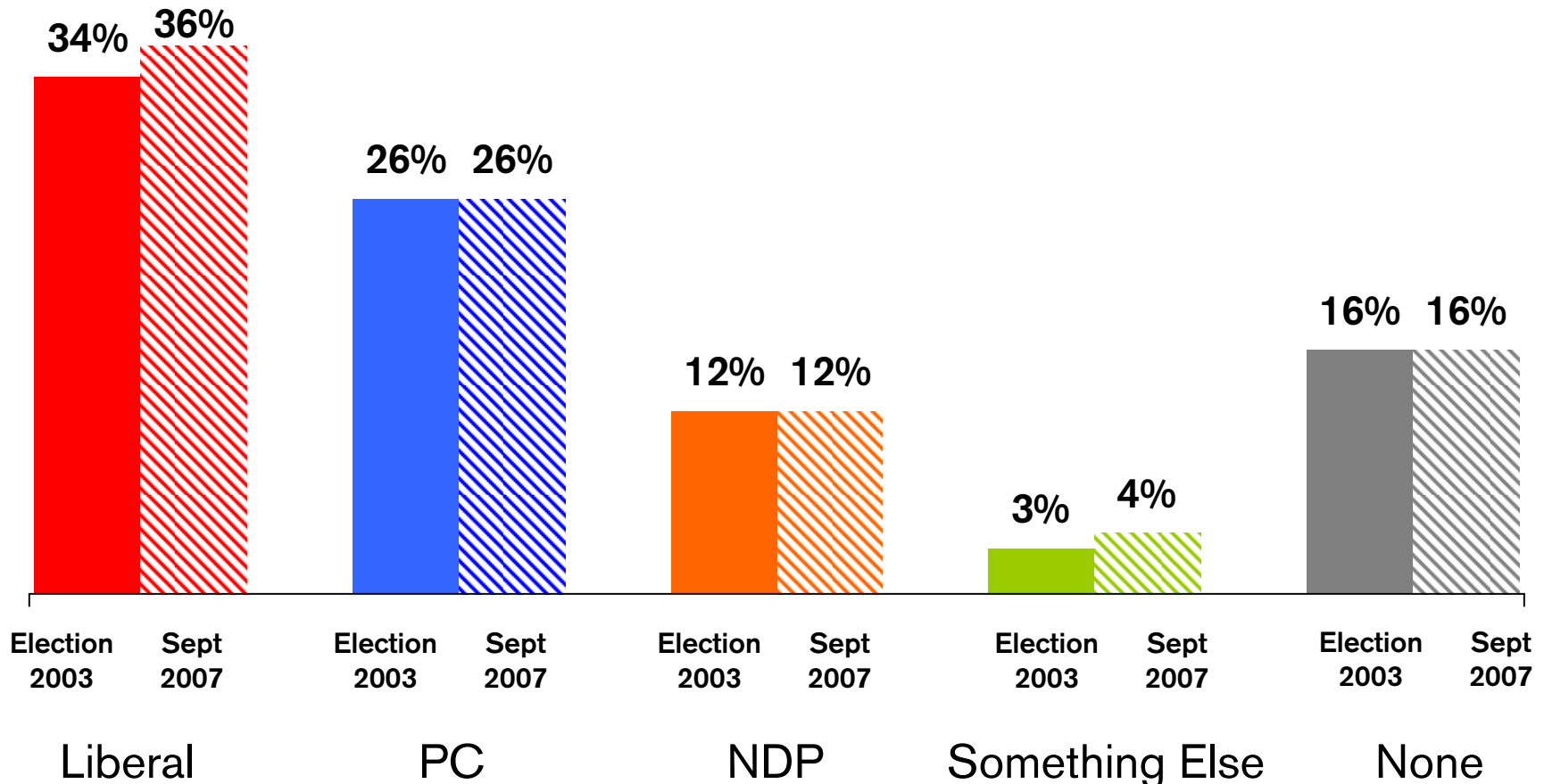
Identification with parties on par with 2003 election

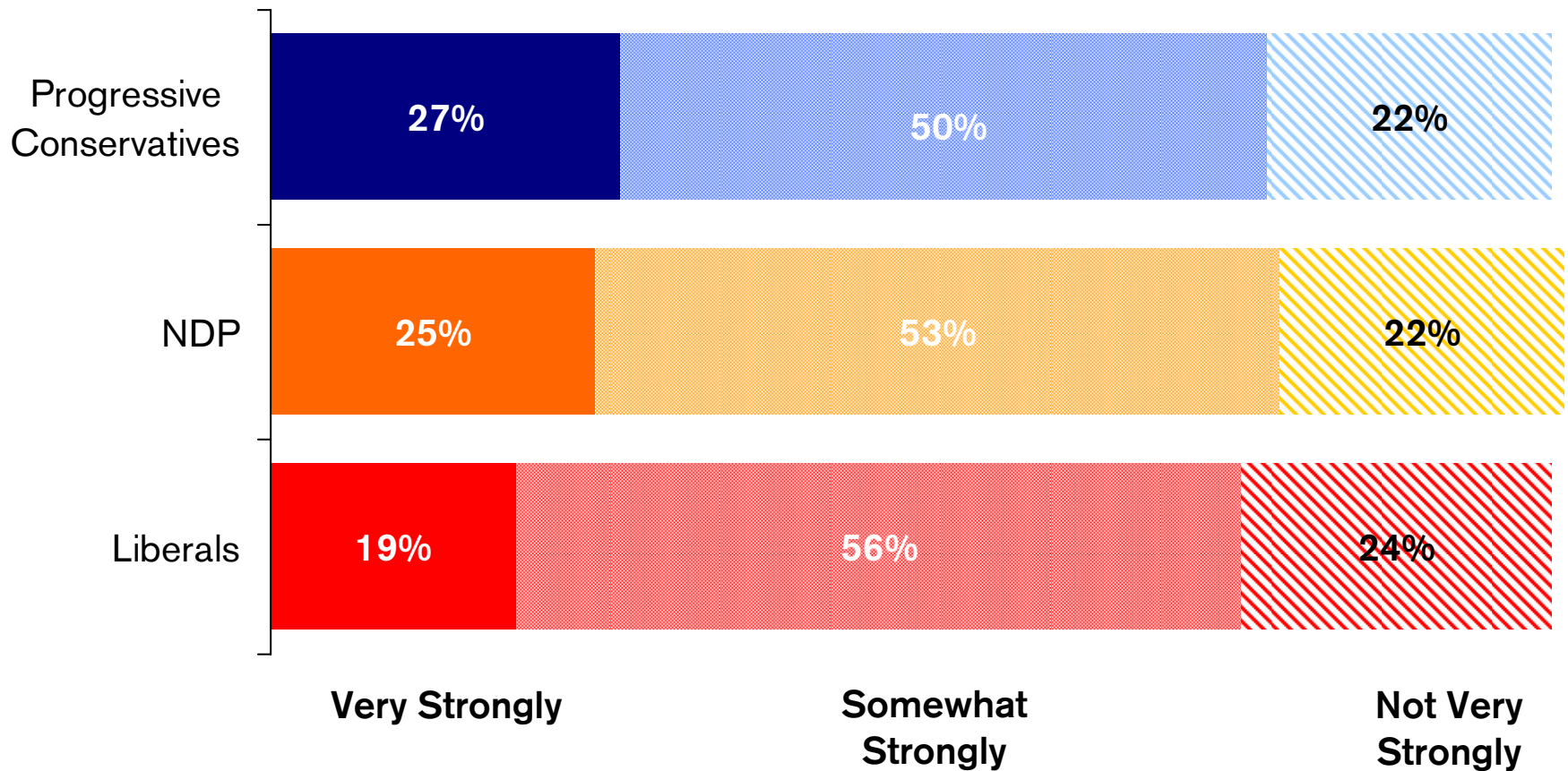**Thinking about politics in ONTARIO, generally speaking, do you usually think of yourself as a Progressive Conservative, Liberal, New Democrat, something else or none of these?**

	Election 2003	Sept 2007
Liberal	34%	36%
PC	26%	26%
NDP	12%	12%
Something Else	3%	4%
None	16%	16%

Note: 'Don't know/Refused' not shown

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But, Liberals have lowest intensity of party identity

How strongly do you view yourself as a Liberal, Progressive Conservative or NDP?

Party	Very Strongly	Somewhat Strongly	Not Very Strongly
Progressive Conservatives	27%	50%	22%
NDP	25%	53%	22%
Liberals	19%	56%	24%

Note: 'Don't know' not shown

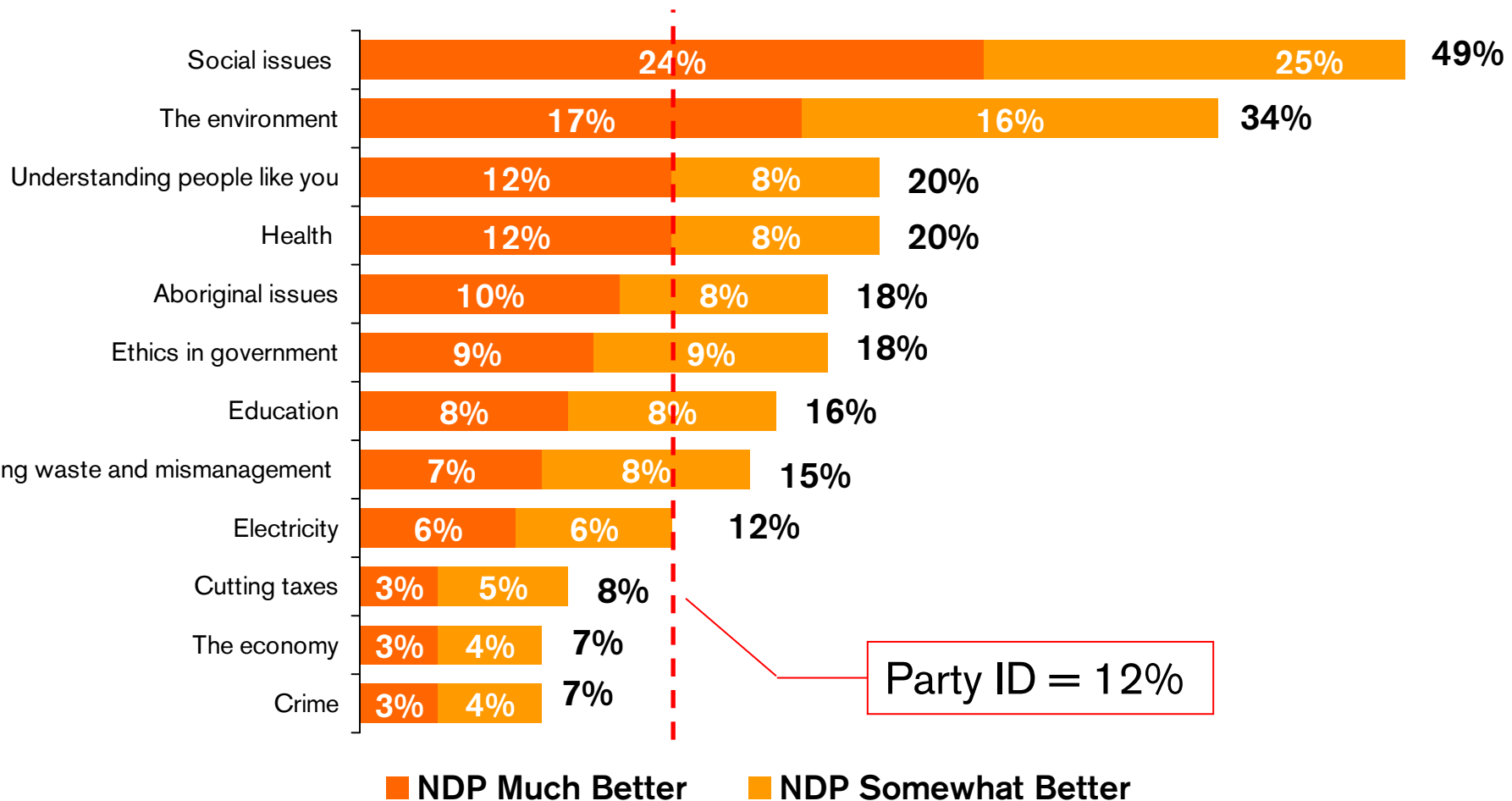INNOVATIVE
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Evaluating the parties

Q *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 … ?*

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NDP outperforms on social issues and the environment

Q … please tell me which PROVINCIAL political party you think would do a 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 … ?

Issue	NDP Much Better	NDP Somewhat Better	Total
Social issues	24%	25%	**49%**
The environment	17%	16%	**34%**
Understanding people like you	12%	8%	**20%**
Health	12%	8%	**20%**
Aboriginal issues	10%	8%	**18%**
Ethics in government	9%	9%	**18%**
Education	8%	8%	**16%**
Reducing waste and mismanagement	7%	8%	**15%**
Electricity	6%	6%	**12%**
Cutting taxes	3%	5%	**8%**
The economy	3%	4%	**7%**
Crime	3%	4%	**7%**

Party ID = 12%

■ NDP Much Better   ■ NDP Somewhat Better

Note: 'All of them / Don't know' not shown

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PCs out perform on taxes, crime and the economy

Q … please tell me which PROVINCIAL political party you think would do a 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 … ?
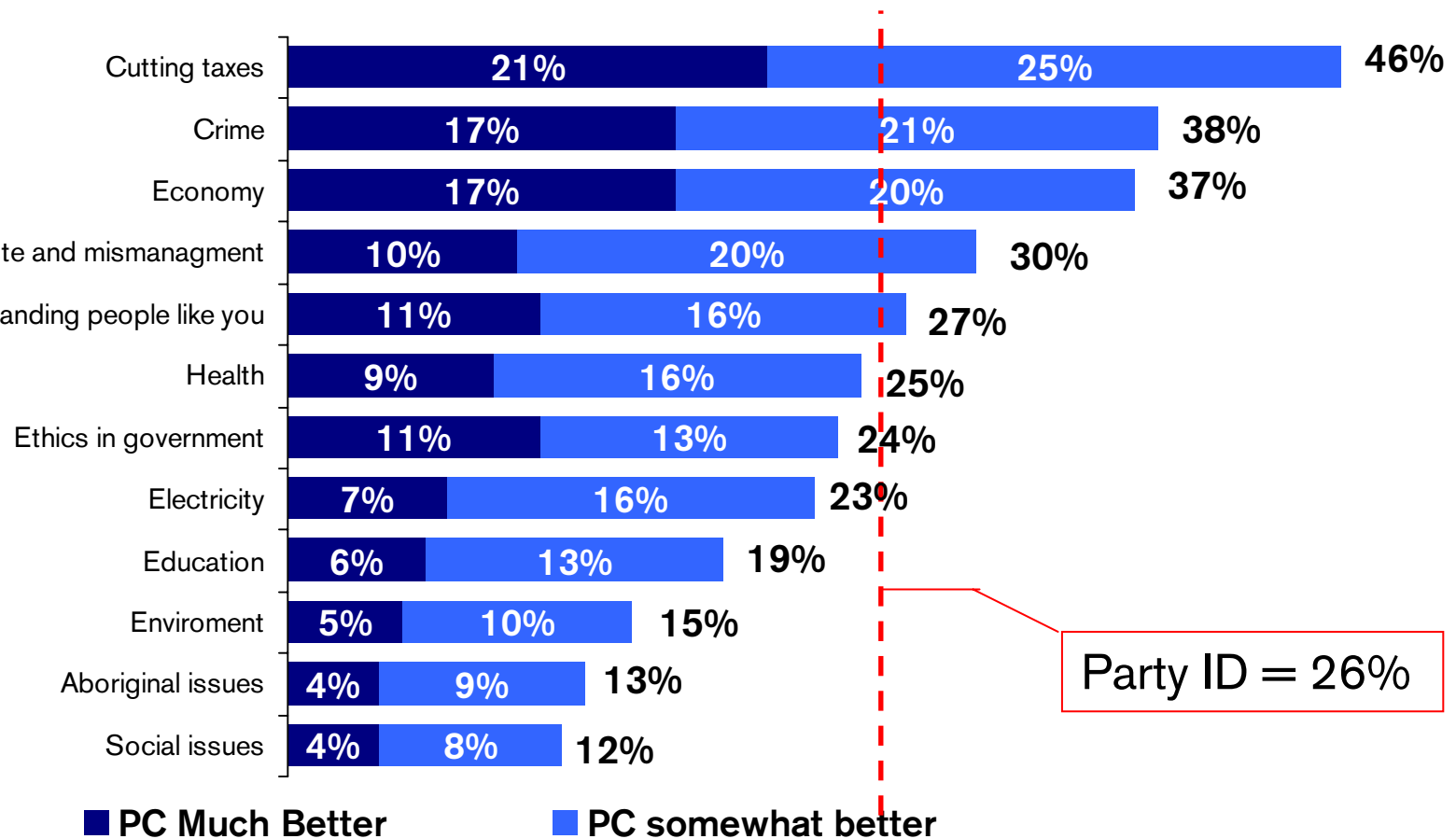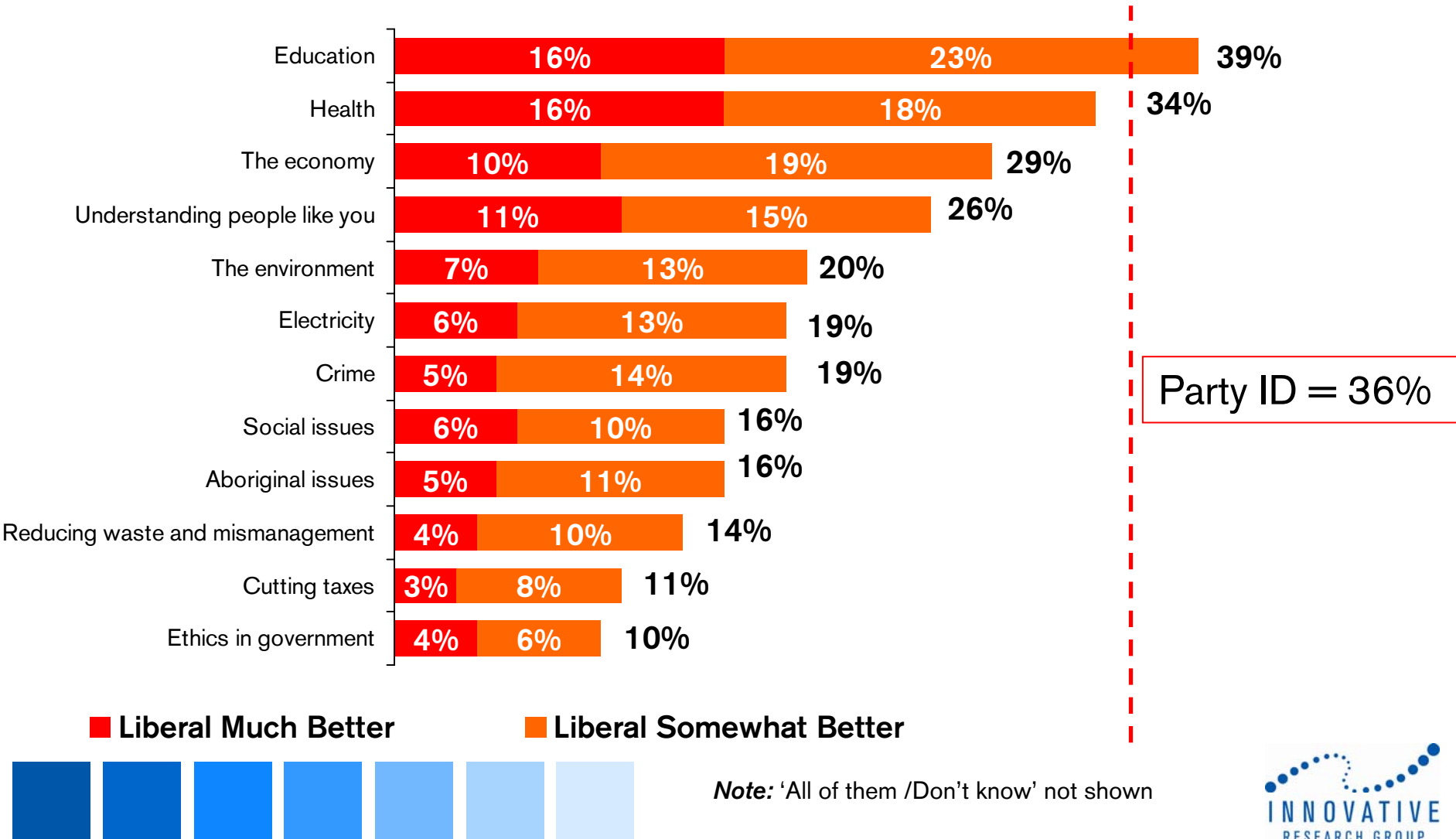
Issue	PC Much Better	PC somewhat better	Total
Cutting taxes	21%	25%	46%
Crime	17%	21%	38%
Economy	17%	20%	37%
Reducing waste and mismanagment	10%	20%	30%
Understanding people like you	11%	16%	27%
Health	9%	16%	25%
Ethics in government	11%	13%	24%
Electricity	7%	16%	23%
Education	6%	13%	19%
Enviroment	5%	10%	15%
Aboriginal issues	4%	9%	13%
Social issues	4%	8%	12%

■ **PC Much Better**   ■ **PC somewhat better**

Party ID = 26%

Note: 'All of them / Don't know' not shown

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Liberal's education performance only over-performing issue

… please tell me which PROVINCIAL political party you think would do a 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 … ?
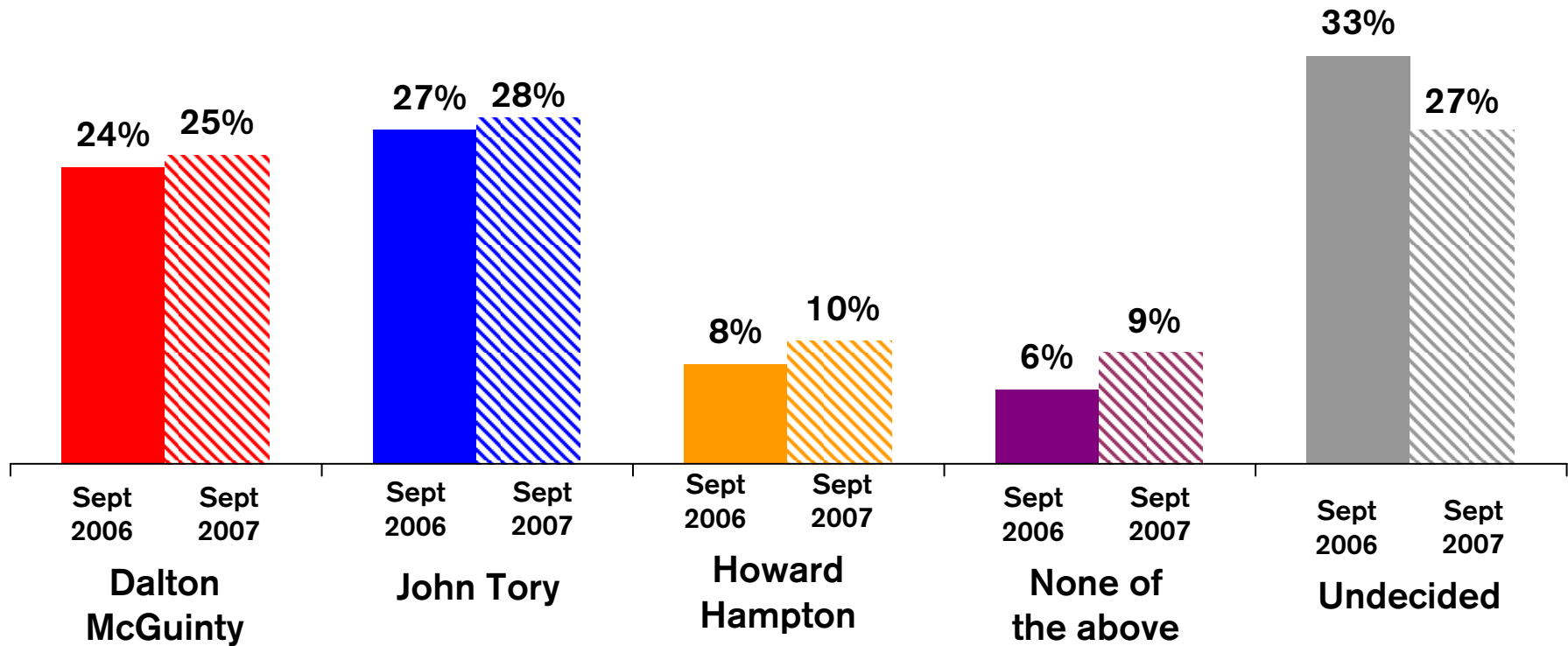
Issue	Liberal Much Better	Liberal Somewhat Better	Total
Education	16%	23%	39%
Health	16%	18%	34%
The economy	10%	19%	29%
Understanding people like you	11%	15%	26%
The environment	7%	13%	20%
Electricity	6%	13%	19%
Crime	5%	14%	19%
Social issues	6%	10%	16%
Aboriginal issues	5%	11%	16%
Reducing waste and mismanagement	4%	10%	14%
Cutting taxes	3%	8%	11%
Ethics in government	4%	6%	10%

Party ID = 36%

■ **Liberal Much Better**   ■ **Liberal Somewhat Better**

Note: 'All of them /Don't know' not shown

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Political Leadership in Ontario

Little change over last year

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

	Dalton McGuinty		John Tory		Howard Hampton		None of the above		Undecided	
	Sept 2006	Sept 2007	Sept 2006	Sept 2007	Sept 2006	Sept 2007	Sept 2006	Sept 2007	Sept 2006	Sept 2007
	24%	25%	27%	28%	8%	10%	6%	9%	33%	27%

Note: Other (2%) not shown

Plurality have unfavourable impression of McGuinty
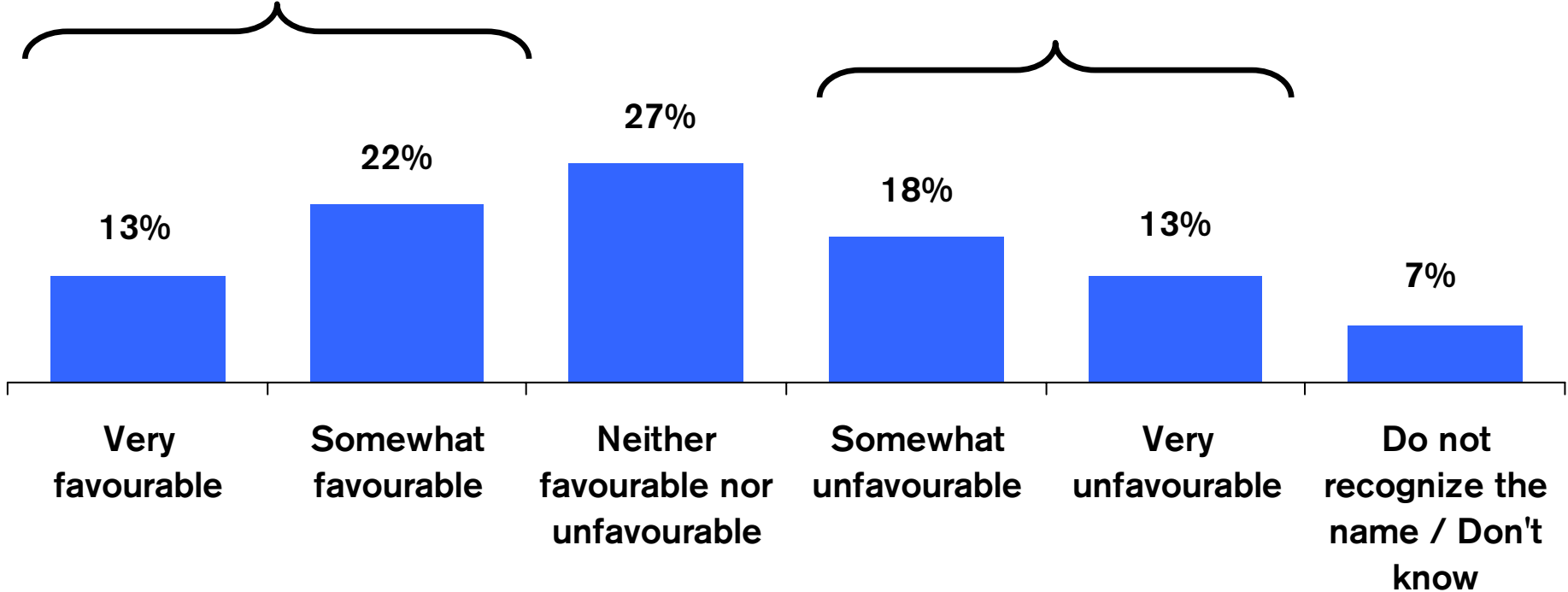
What is your impression of Dalton McGuinty?

43% Unfavourable

33% Favourable

7%	26%	21%	20%	23%	4%
Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Do not recognize the name / Don't know
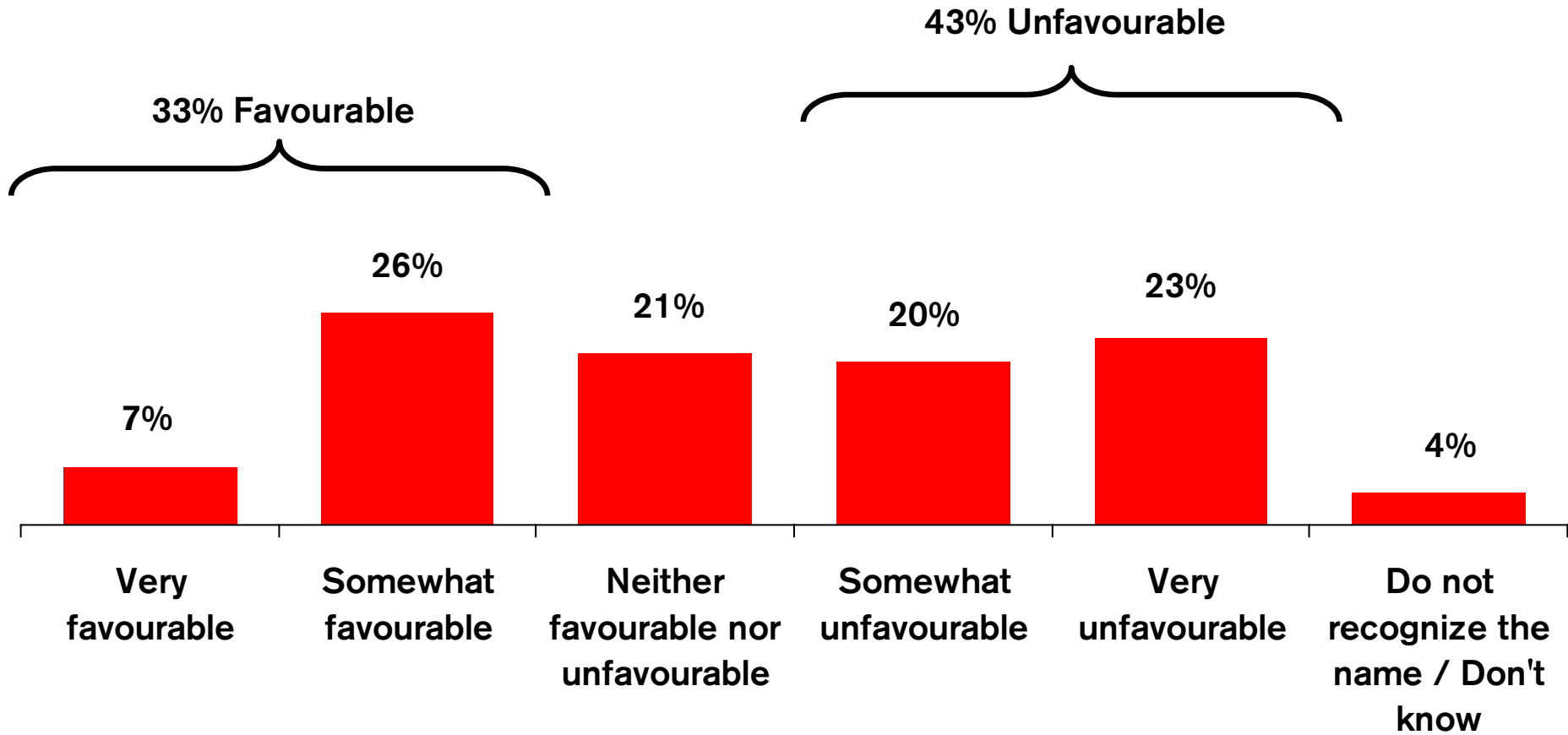
One-third have favourable impression of Tory

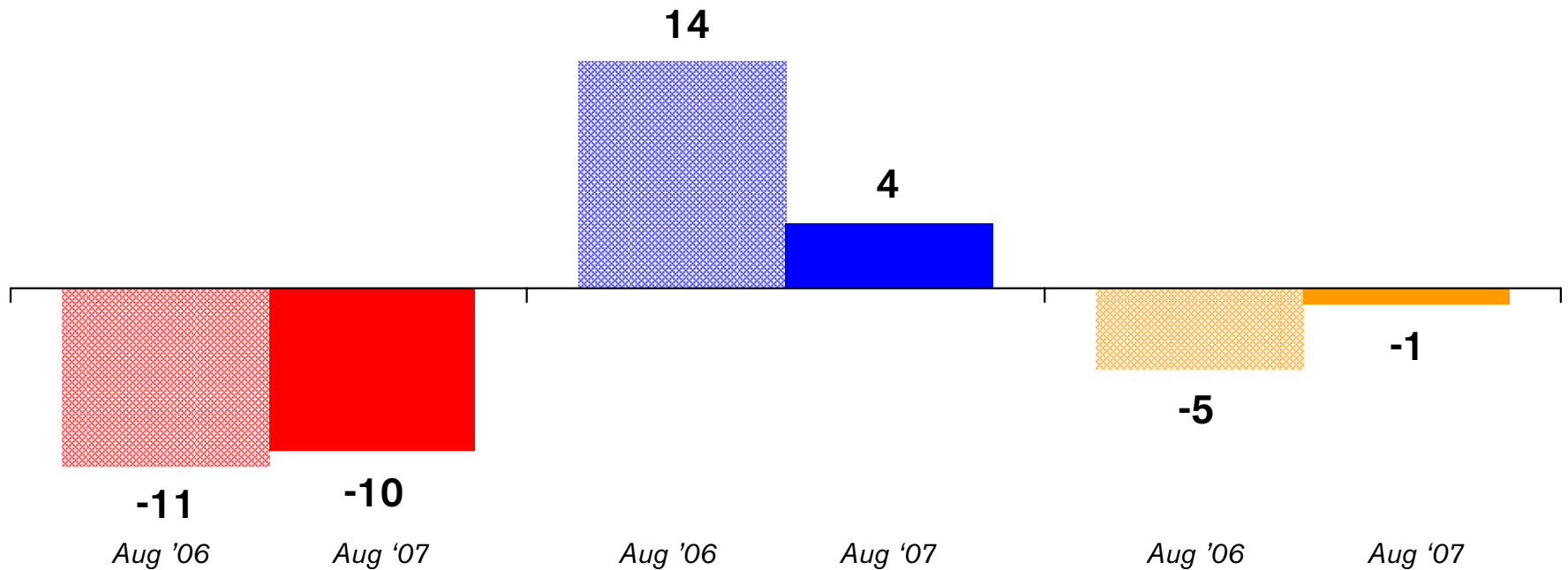**What is your impression of John Tory?**

35% Favourable

31% Unfavourable

13%

22%

27%

18%

13%

7%

Very favourable

Somewhat favourable

Neither favourable nor unfavourable

Somewhat unfavourable

Very unfavourable

Do not recognize the name / Don't know

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Ontarians split on Hampton

What is your impression of Howard Hampton?

23% Favourable

24% Unfavourable

- Very favourable: 5%
- Somewhat favourable: 18%
- Neither favourable nor unfavourable: 41%
- Somewhat unfavourable: 14%
- Very unfavourable: 10%
- Do not recognize the name / Don't know: 12%

Note: 'Refused' (1%) not shown

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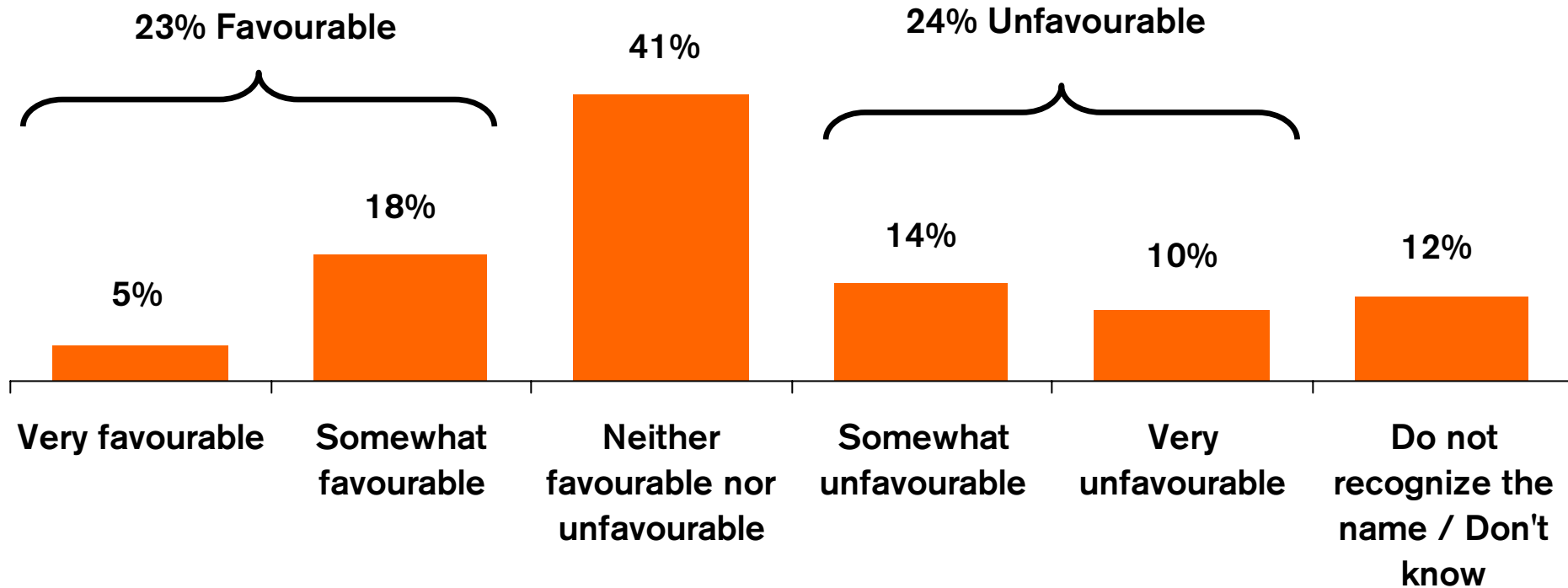
Tory takes a hit on net favourables, but still positive

■ **Dalton McGuinty**　　　■ **John Tory**　　　■ **Howard Hampton**

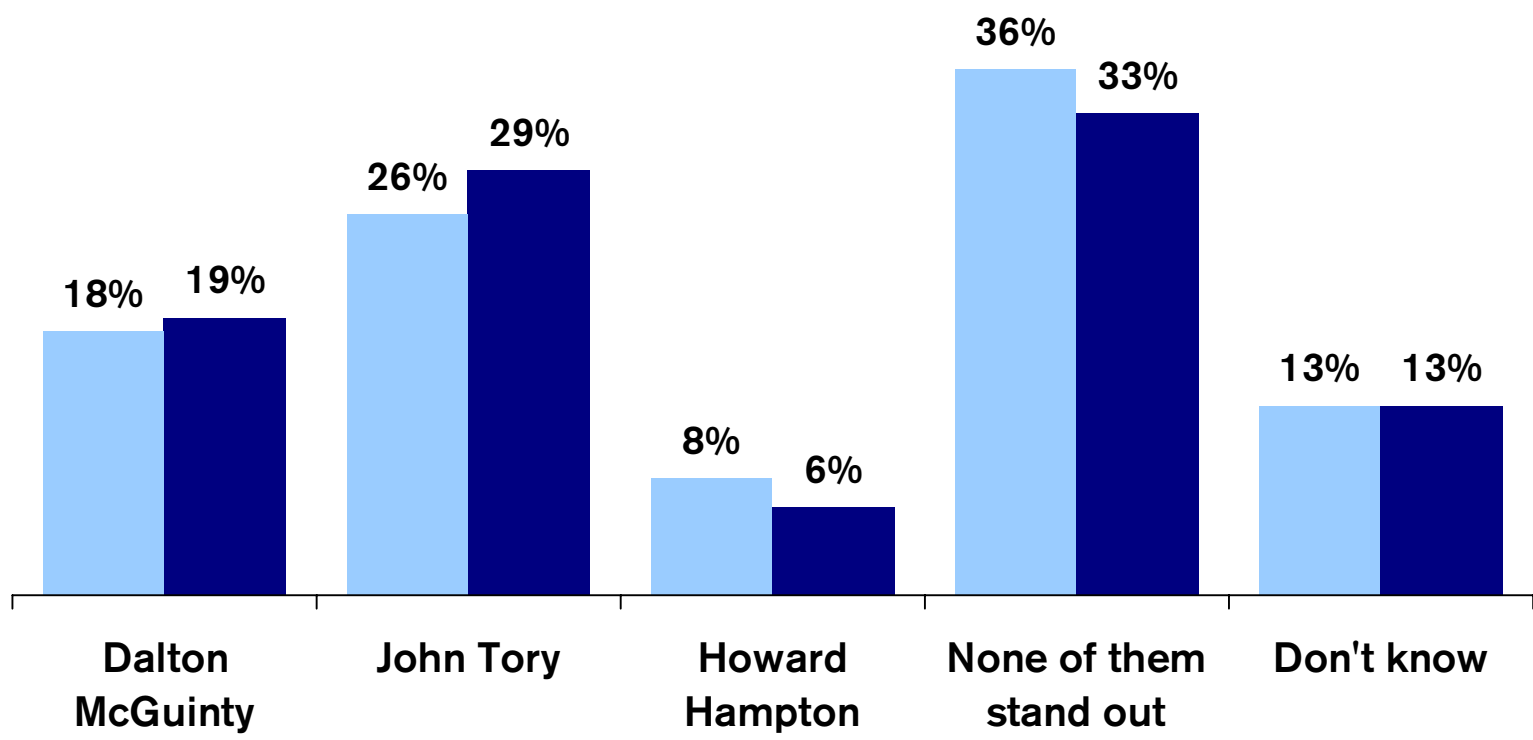| Dalton McGuinty		John Tory		Howard Hampton	
-11	-10	14	4	-5	-1
Aug '06	Aug '07	Aug '06	Aug '07	Aug '06	Aug '07

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Understanding leadership traits

Q

Below is a list of different words or phrases that describe the political leaders. For each word or phrase, please indicate whether it BEST describes John Tory, the PC leader, Dalton McGuinty, the Liberal leader, or Howard Hampton the NDP leader - or whether none of them stand out on that item.
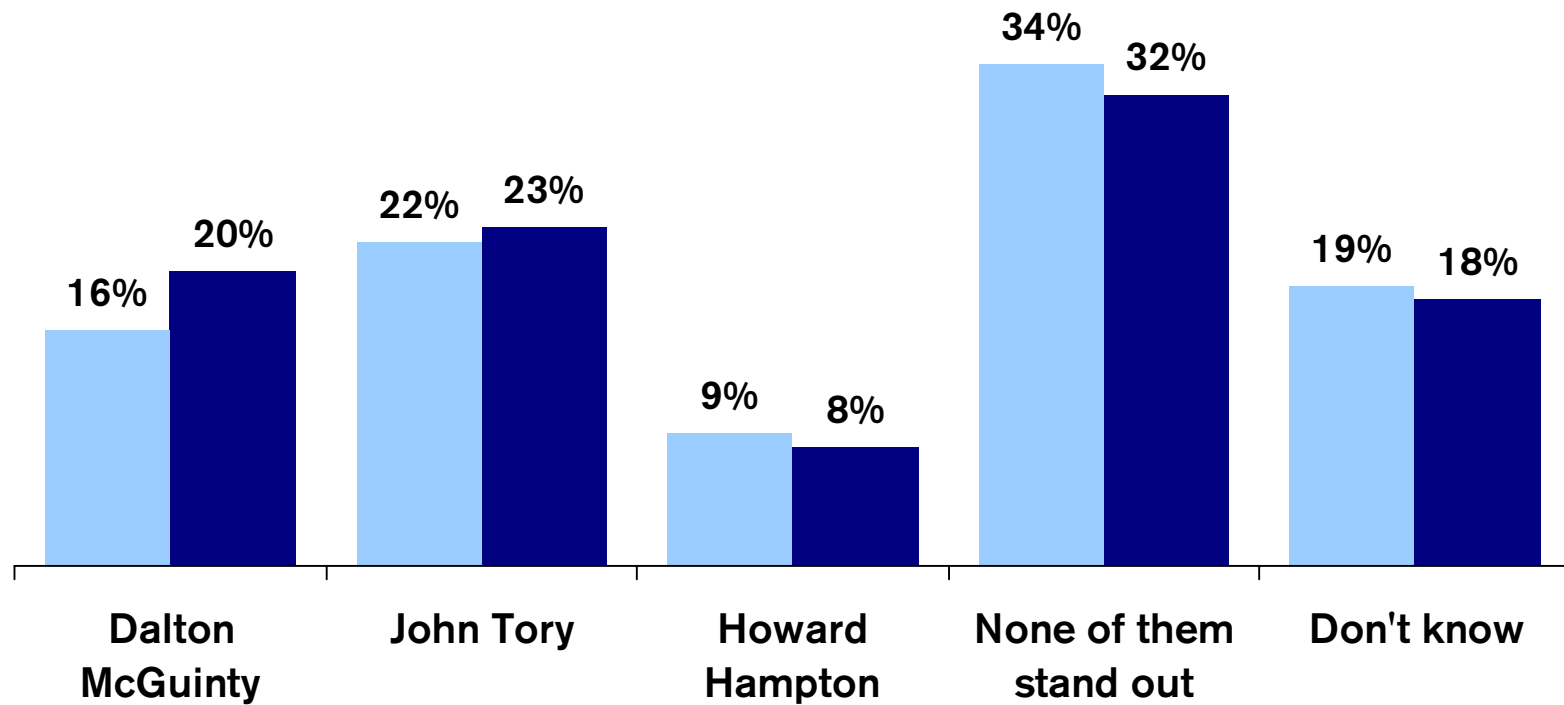
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Strong leadership

Dalton McGuinty: 18%, 19%
John Tory: 26%, 29%
Howard Hampton: 8%, 6%
None of them stand out: 36%, 33%
Don't know: 13%, 13%

Sept '07 Sept '06

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Has the best plan for the future

Chart data:

Category	Sept '06	Sept '07
Dalton McGuinty	16%	20%
John Tory	22%	23%
Howard Hampton	9%	8%
None of them stand out	34%	32%
Don't know	19%	18%

Legend: Sept '07 ■ Sept '06

Stands for what you believe

Chart showing percentages for Sept '07 (dark blue) and Sept '06 (light blue):

- Dalton McGuinty: 19% (Sept '06), 22% (Sept '07)
- John Tory: 25% (Sept '06), 23% (Sept '07)
- Howard Hampton: 17% (Sept '06), 14% (Sept '07)
- None of them stand out: 28% (Sept '06), 27% (Sept '07)
- Don't know: 12% (Sept '06), 14% (Sept '07)

■ Sept '07 ■ Sept '06

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Too negative

Chart showing "Too negative" responses comparing Sept '07 (dark blue) and Sept '06 (light blue):

Candidate	Sept '06	Sept '07
Dalton McGuinty	7%	8%
John Tory	19%	25%
Howard Hampton	24%	22%
None of them stand out	30%	25%
Don't know	21%	20%

Legend: ■ Sept '07 ■ Sept '06

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Is in the pocket of the rich

Dalton McGuinty	John Tory	Howard Hampton	None of them stand out	Don't know
20%	33%	1%	28%	19%

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Flip flops

Chart showing responses comparing Sept '07 (dark blue) and Sept '06 (light blue):

- Dalton McGuinty: 44% (Sept '06), 48% (Sept '07)
- John Tory: 8% (Sept '06), 9% (Sept '07)
- Howard Hampton: 5% (Sept '06), 4% (Sept '07)
- None of them stand out: 24% (Sept '06), 22% (Sept '07)
- Don't know: 19% (Sept '06), 18% (Sept '07)

Legend: Sept '07, Sept '06

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Makes unrealistic promises

Bar chart comparing "Makes unrealistic promises" responses between Sep '07 and Sept '06:

- Dalton McGuinty: 40% (Sept '06), 41% (Sep '07)
- John Tory: 10% (Sept '06), 17% (Sep '07)
- Howard Hampton: 17% (Sept '06), 14% (Sep '07)
- None of them stand out: 19% (Sept '06), 14% (Sep '07)
- Don't know: 13% (Sept '06), 13% (Sep '07)

Legend: Sep '07, Sept '06

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Cares about people like you

	Dalton McGuinty	John Tory	Howard Hampton	None of them stand out	Don't know
Sept '06	15%	19%	20%	34%	12%
Sept '07	15%	19%	18%	34%	14%

■ Sept '07 ■ Sept '06

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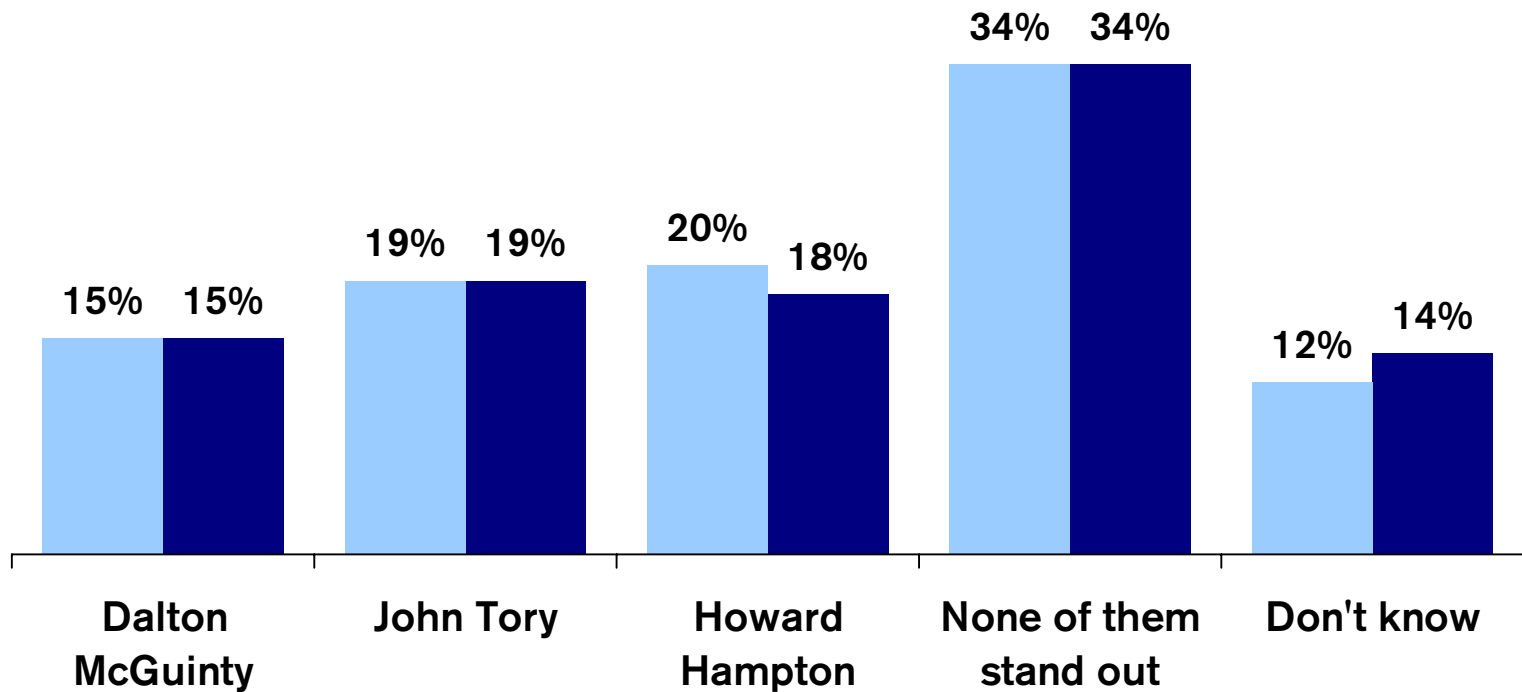
Campaign Discourse

One-third say they are extremely or very interested in upcoming election[51]

Some people don't pay much attention to political campaigns. Thinking about the UPCOMING PROVINCIAL ELECTION how interested are you in the campaign so far? Would you say that you have been...

Interested 32%

Not interested 29%

Extremely interested	Very interested	Somewhat interested	Not very interested	Not interested at all
11%	21%	39%	22%	7%

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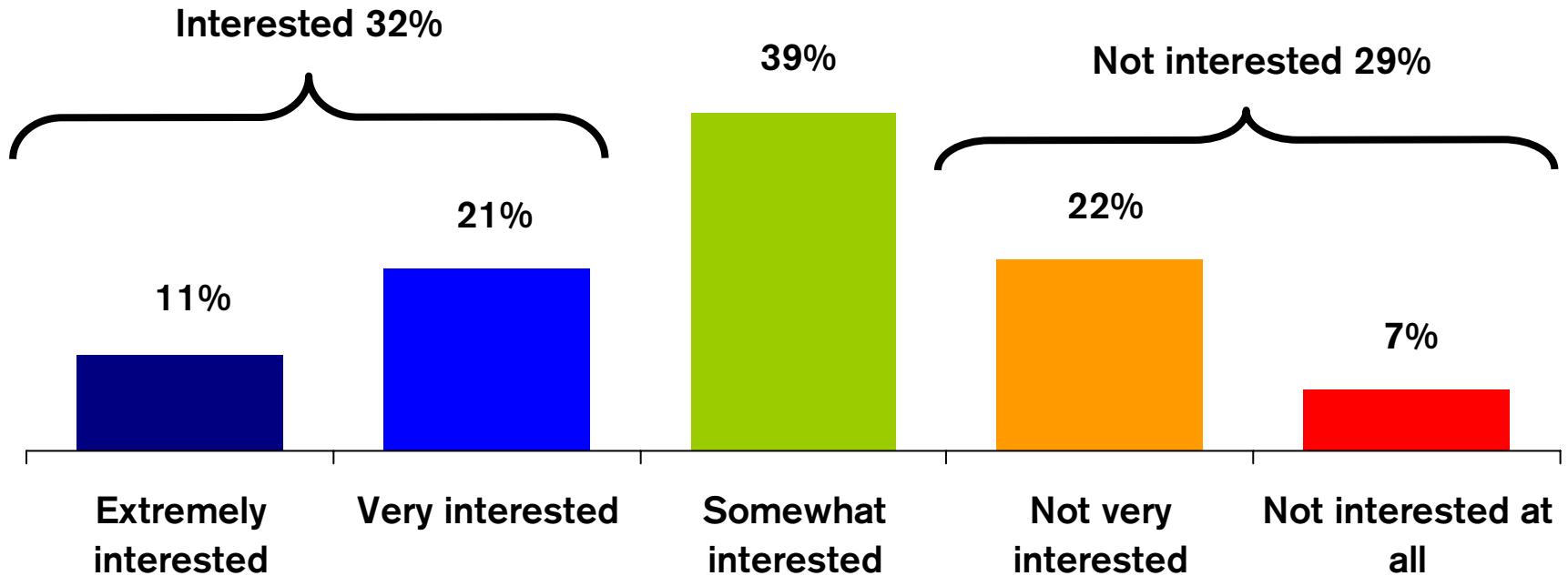
Three-in-ten have discussed upcoming election in the past week at least a few times

Over the past week, how often would you say you have discussed the upcoming provincial election?

Many times	A few times	Once or twice	Not at all
7%	22%	33%	38%

Note: 'Don't know' (<1%) not shown

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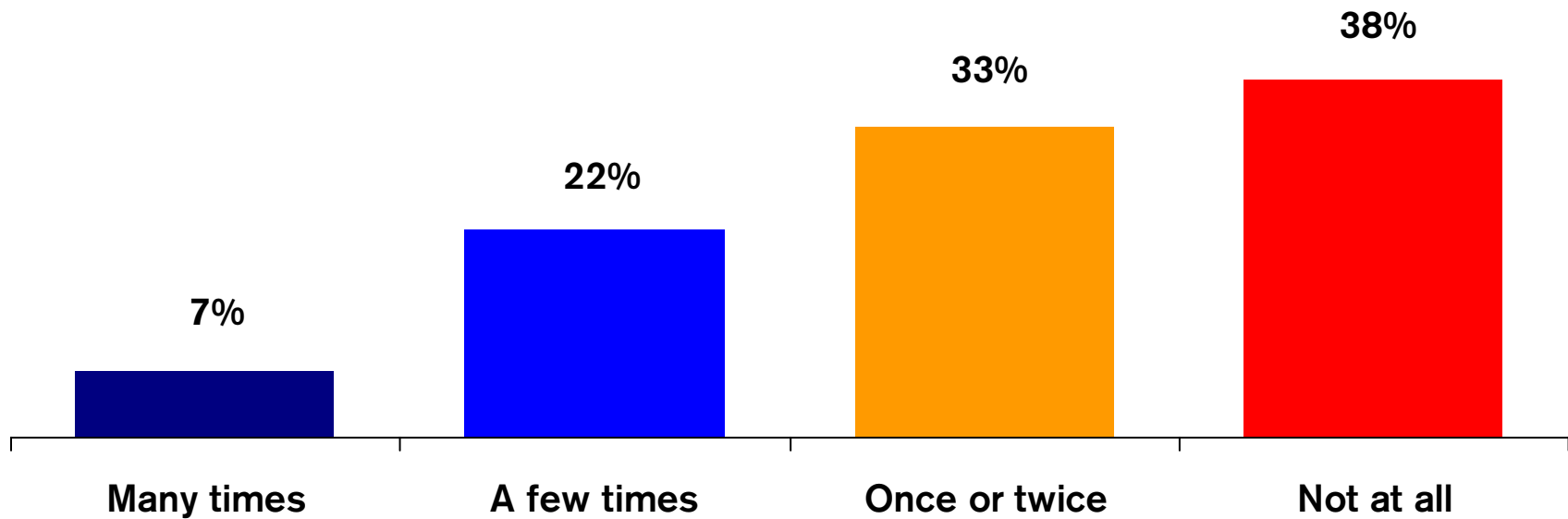
Three-fifths need to hear more before they make up their minds

Which statement is closest to your view?

34%

61%

I have heard all I need to make up my mind in this election

I would like to hear more before I finally make up my mind in this election
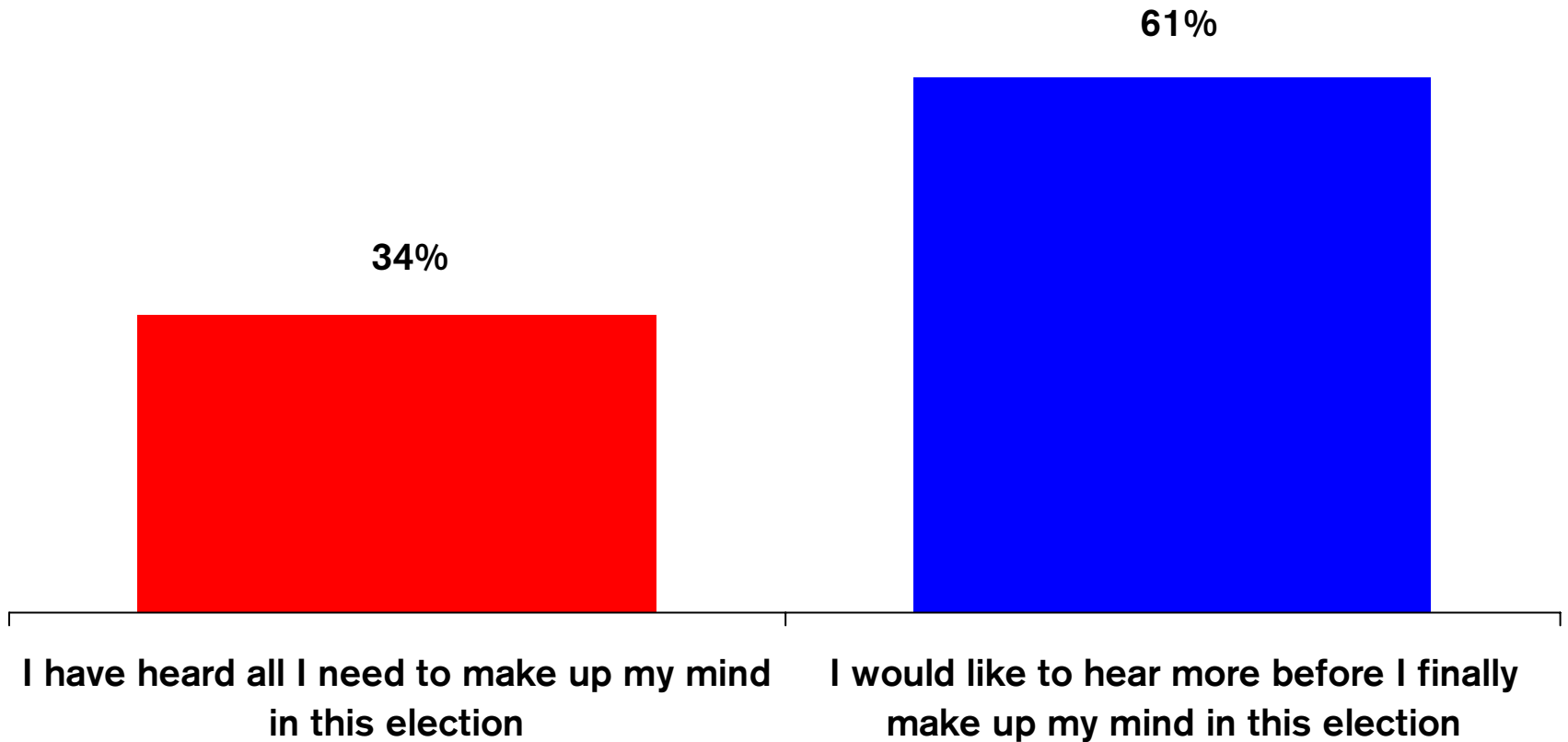
Note: 'Don't know' (5%) not shown

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2004 Not a Fluke – Many Voters Open to End

Which statement is closest to your view? I have heard all I need to make up my mind in this election OR I would like to hear more before I finally make up my mind in this election?
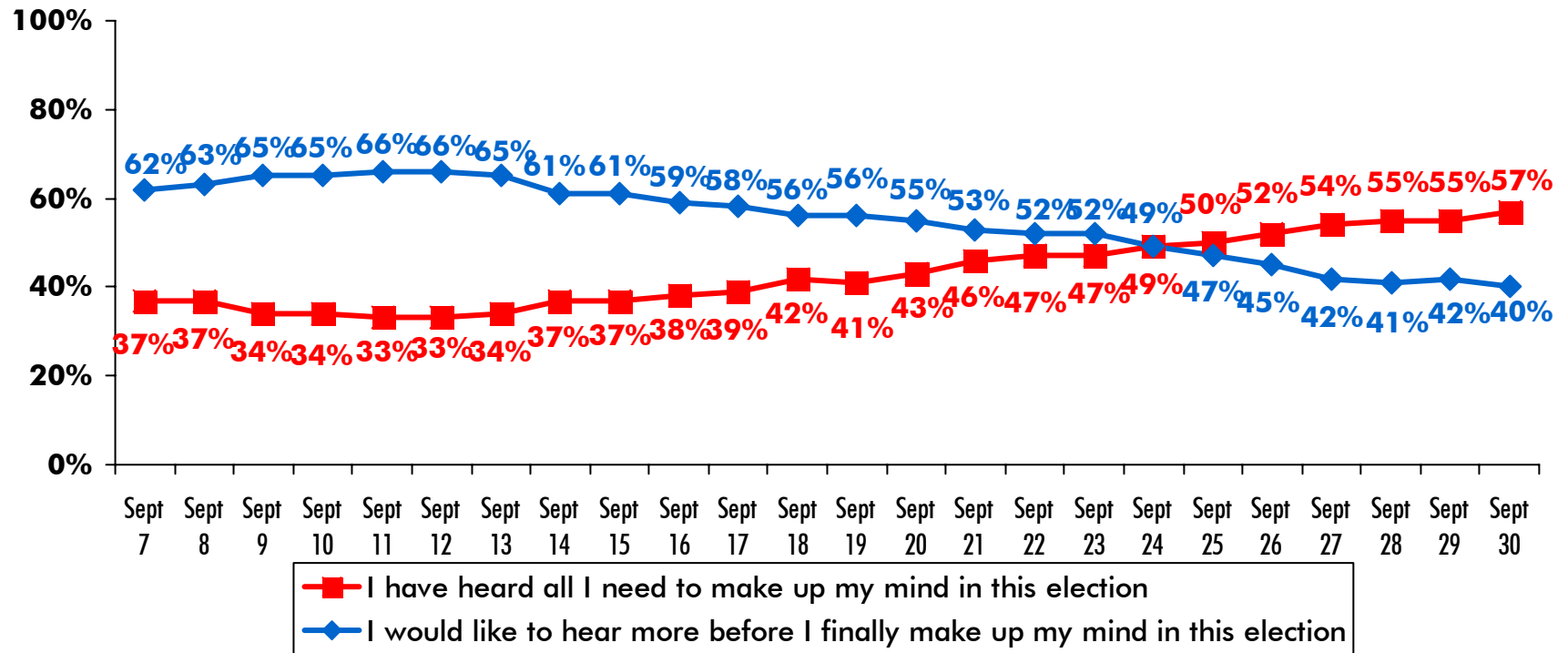
I have heard all I need to make up my mind in this election
I would like to hear more before I finally make up my mind in this election

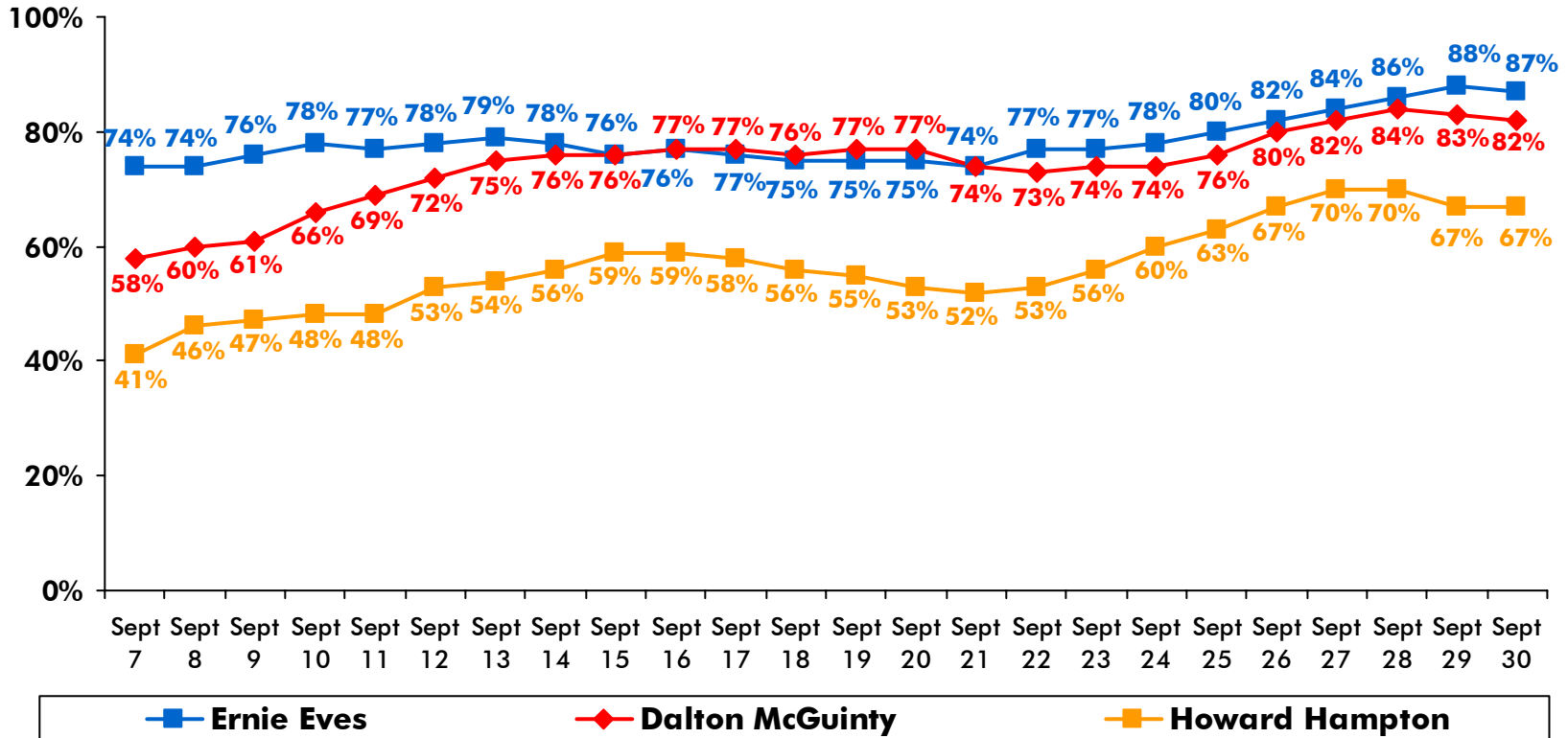V: D3

Don't Know / Refused not shown

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Discourse and Impact

Campaign discourse: Opposition parties catch up in awareness

Have you read, seen or heard anything about Ernie Eves and the PC Party, Dalton McGuinty and the Liberal Party or Howard Hampton and the NDP in the last few days?
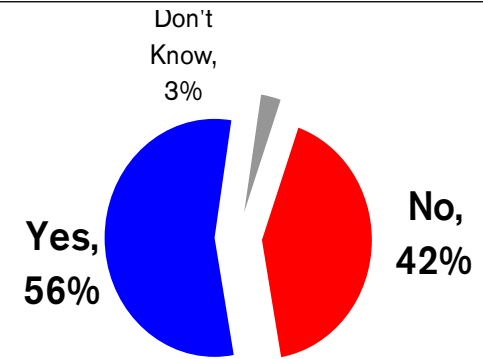

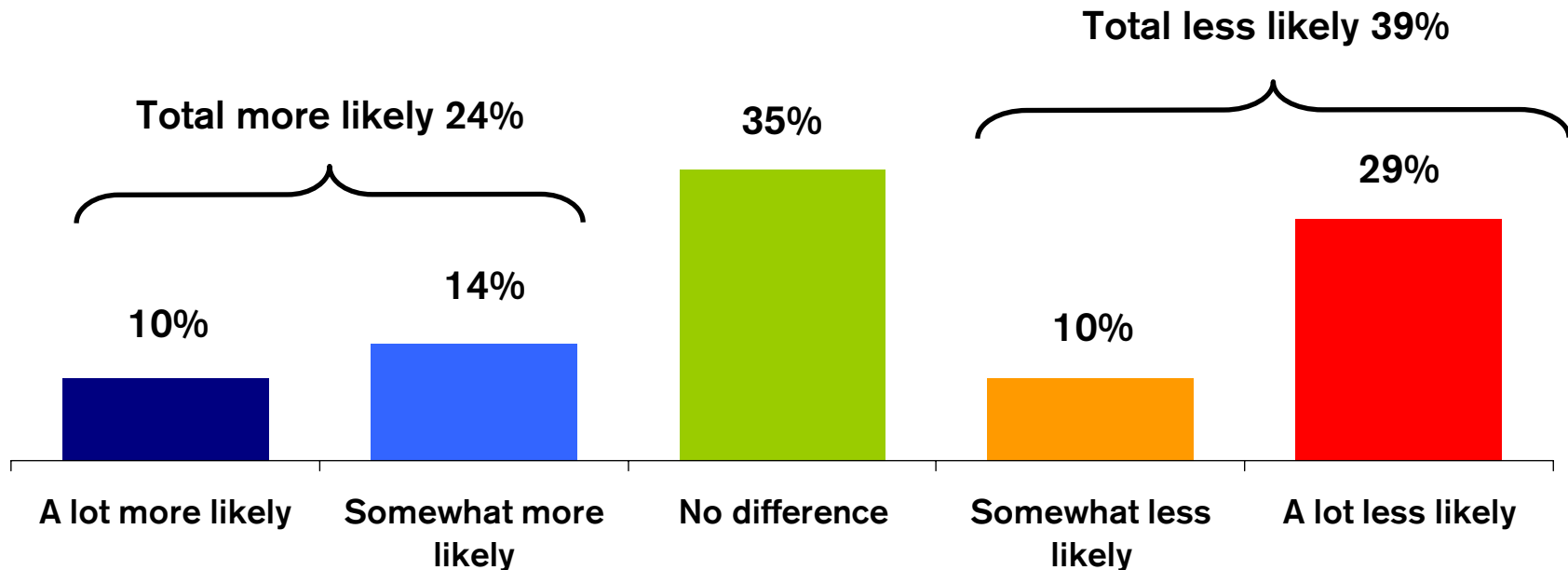V: G1, G4, G7

Don't Know/Refused not shown

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Net negative likelihood to vote Tory based on recall

Have you read, seen or heard anything about John Tory and the PC Party in the last few days?
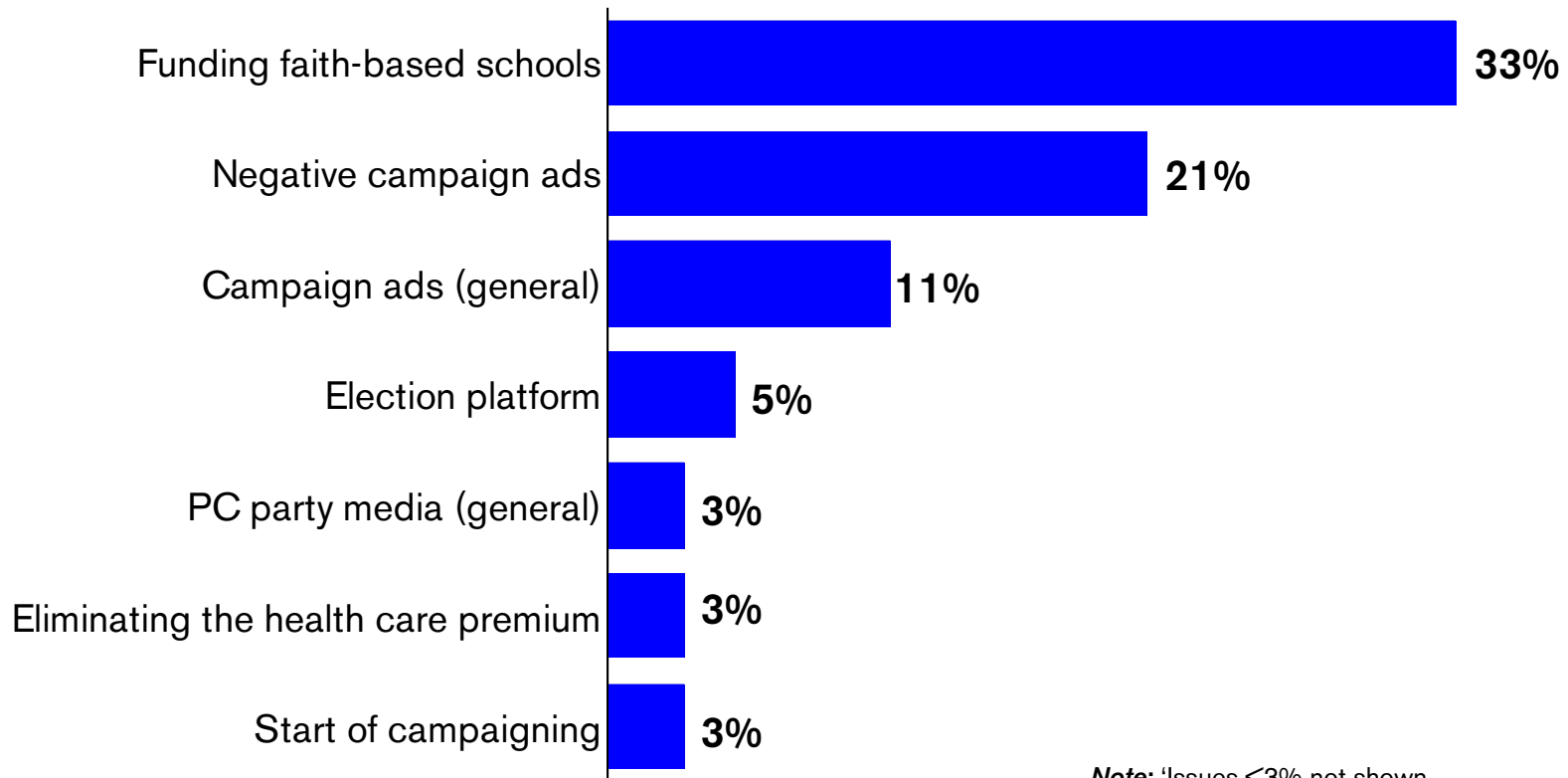
Don't Know, 3%

Yes, 56%

No, 42%

Did what you read, saw or heard leave you feeling more or less likely to vote PC? (n=799)

Total more likely 24%

Total less likely 39%

A lot more likely	Somewhat more likely	No difference	Somewhat less likely	A lot less likely
10%	14%	35%	10%	29%

Note: 'Don't know' (2%) not shown

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Funding faith-based schools top mention for Tories

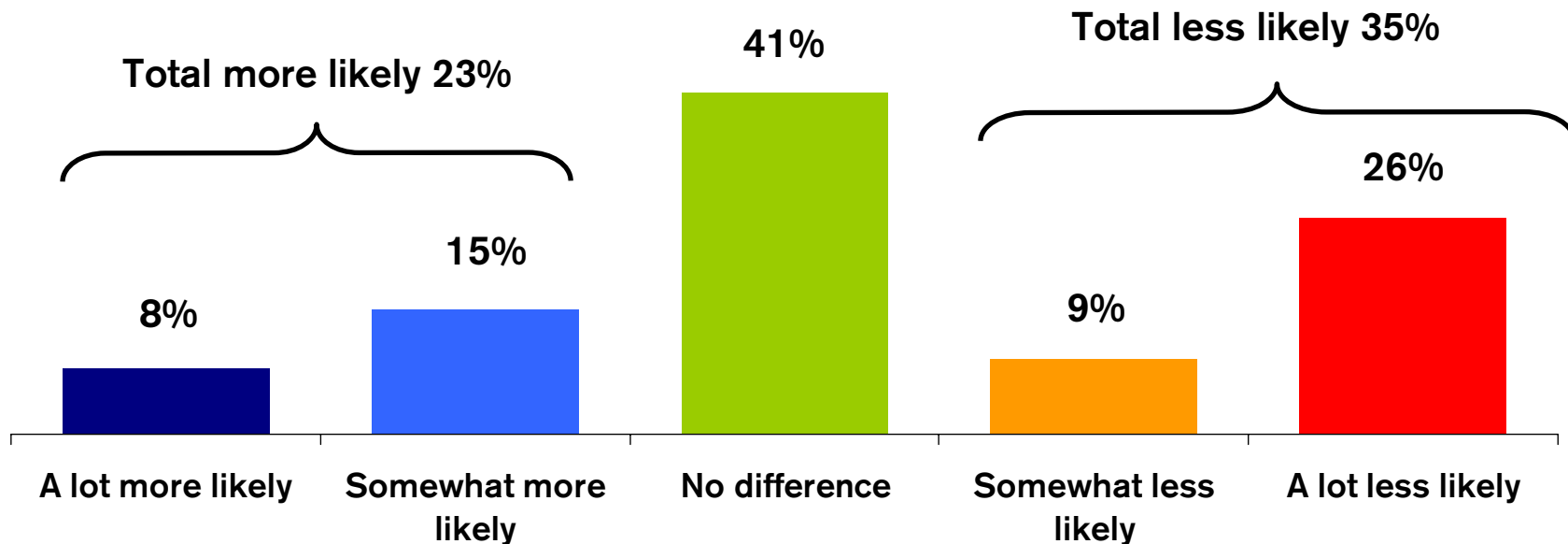**What was the last thing, you have read, seen or heard about John Tory and the PC Party?**

Category	Percentage
Funding faith-based schools	**33%**
Negative campaign ads	**21%**
Campaign ads (general)	**11%**
Election platform	**5%**
PC party media (general)	**3%**
Eliminating the health care premium	**3%**
Start of campaigning	**3%**

Note: 'Issues <3% not shown

Note: 'Don't know' (3%) not shown

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Net negative likelihood to vote Liberal based on recall

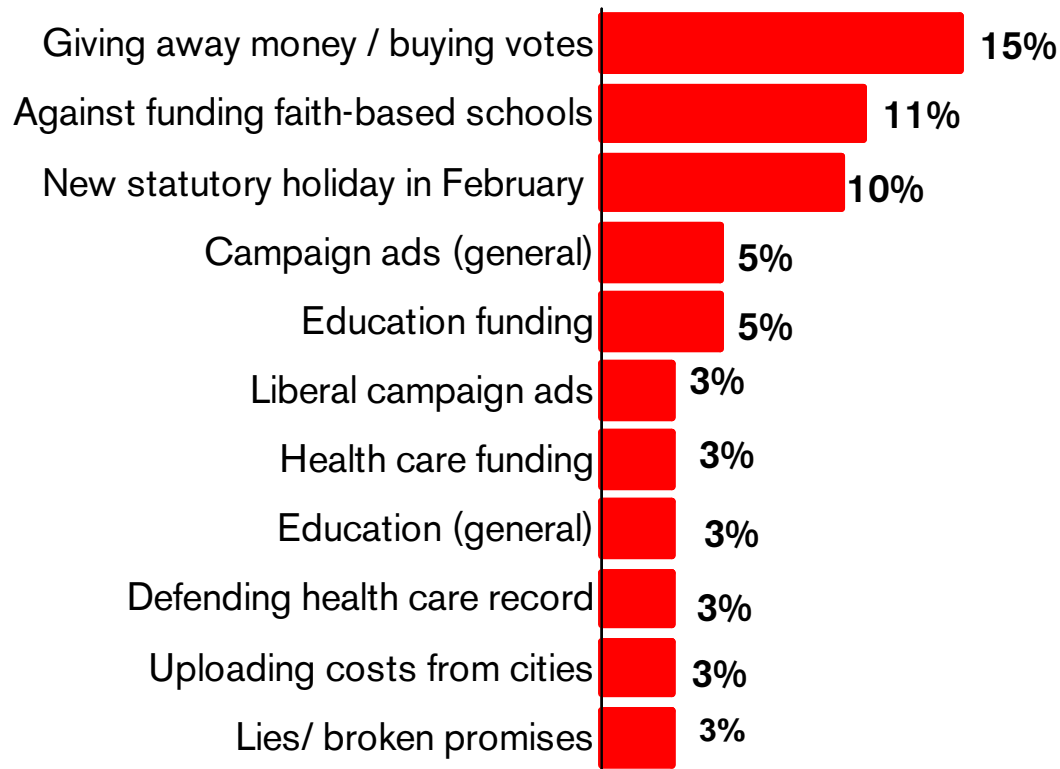**Have you read, seen or heard anything about Dalton McGuinty and the Liberal Party in the last few days?**

Yes, 52%

No, 44%
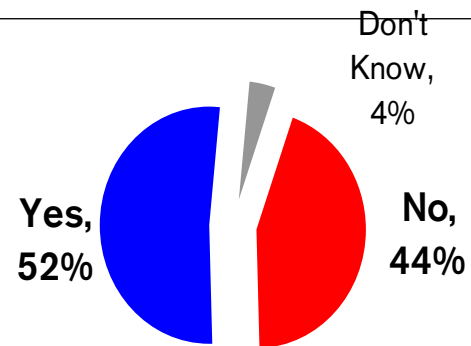
Don't Know, 4%

Did what you read, saw or heard leave you feeling more or less likely to vote Liberal? (n=777)

Total more likely 23%

Total less likely 35%

41% — No difference

8% — A lot more likely

15% — Somewhat more likely

9% — Somewhat less likely

26% — A lot less likely

Note: 'Don't know' (1%) not shown

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'Buying votes' top mention for Grits

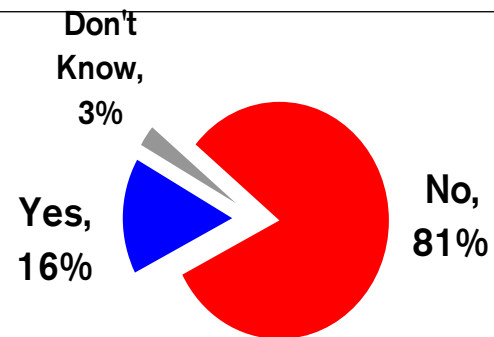**What was the last thing, you have read, seen or heard about Dalton McGuinty and the Liberal Party?**

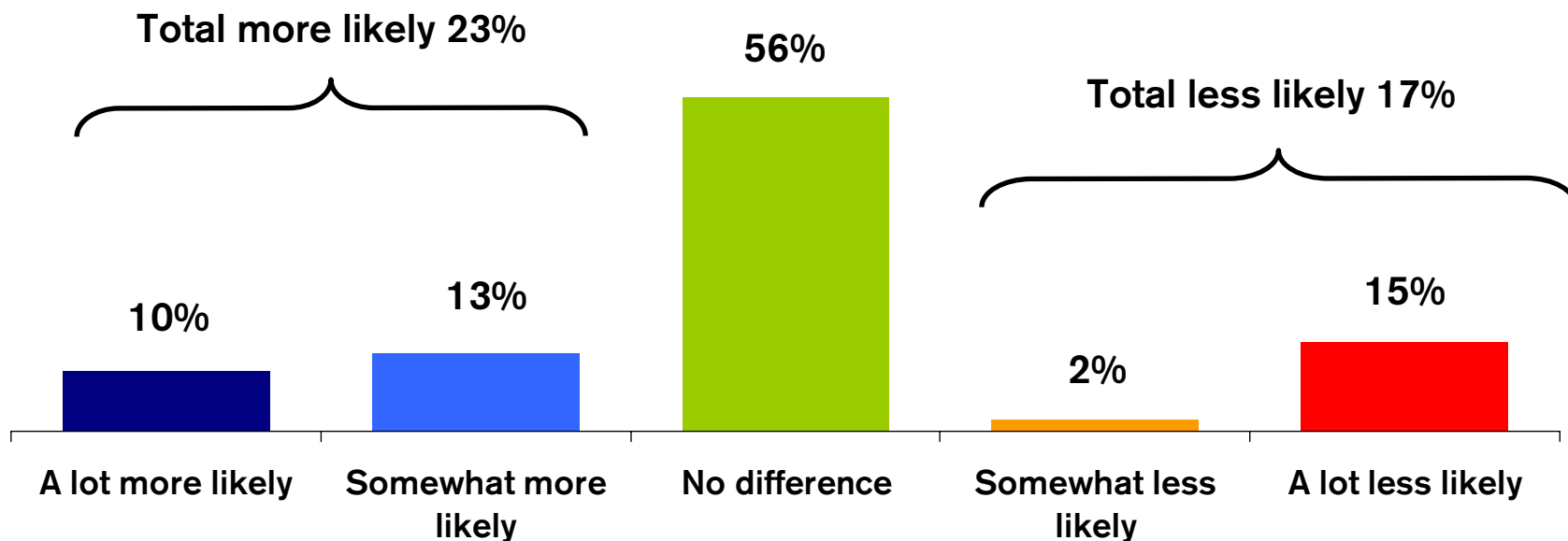| Issue	Percentage
Giving away money / buying votes	15%
Against funding faith-based schools	11%
New statutory holiday in February	10%
Campaign ads (general)	5%
Education funding	5%
Liberal campaign ads	3%
Health care funding	3%
Education (general)	3%
Defending health care record	3%
Uploading costs from cities	3%
Lies/ broken promises	3%

Note: Issues <3% not shown

Note: 'Don't know' (2%) not shown

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Net positive likelihood to vote NDP based on recall

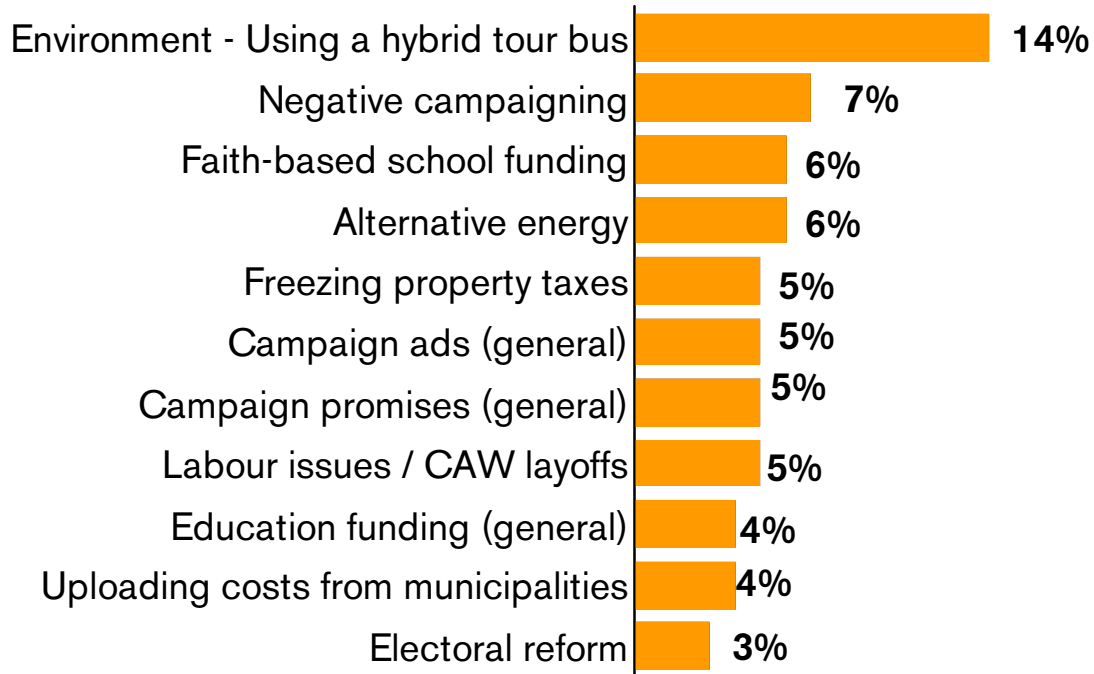**Have you read, seen or heard anything about Howard Hampton and the NDP in the last few days?**

Don't Know, 3%

Yes, 16%

No, 81%

Did what you read, saw or heard leave you feeling more or less likely to vote NDP? (n=233)

Total more likely 23%

56%

Total less likely 17%

10%

13%

2%

15%

A lot more likely

Somewhat more likely

No difference

Somewhat less likely

A lot less likely

Note: 'Don't know' (3%) not shown

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Hybrid tour bus top mention for NDP

What was the last thing, you have read, seen or heard about Howard Hampton and the NDP?

Issue	Percentage
Environment - Using a hybrid tour bus	**14%**
Negative campaigning	**7%**
Faith-based school funding	**6%**
Alternative energy	**6%**
Freezing property taxes	**5%**
Campaign ads (general)	**5%**
Campaign promises (general)	**5%**
Labour issues / CAW layoffs	**5%**
Education funding (general)	**4%**
Uploading costs from municipalities	**4%**
Electoral reform	**3%**

Note: Issues <3% not shown

Note: 'Don't know' (7%) not shown

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And they're off . . .

What do the Liberals have to do?

- This poll suggests the Liberals are on the right track

  - Introducing newly awakening swing voters to John Tory on the defensive is critical to minimizing the potential of the leadership wedge.

  - Doing it on health and education primes their best issues on the issue matrix

- The Liberal's greatest challenge is to shut down the threat from the left

- The Liberal's key campaign imperative is to keep 'time for a change' from growing by quickly shutting down any new controversies over the government's record

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What does the NDP have to do?

- This poll shows the NDP has an opportunity to prove York South-Weston was not a fluke

- Their number one priority is to focus the campaign on the environment and social issues

- Their single biggest challenge is to break into the media

  – Fair play guidelines in the media will level the playing field over the course of the campaign

  – Their record in the last campaign shows they know how to do this

- The decision to exclude the Green Party from the debate is a tremendous boon to the NDP

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What do the Tories need to do?

- The first priority must be to introduce their leader to those who don't know him in a favourable light

- Build more positive momentum:

  - Change the channel from faith-based funding at the macro level

  - In the short run, move to taxes, crime and jobs

- Find out why they don't own ethics and reducing waste and mismanagement.

  - These issues appear to motivate their base but not the swing vote

  - If the PCs can own those issues, they can change the channel to them

This election starts as the Liberal's to lose

- The Liberals come into this race with three things going for them:
  - A strong lead in party brand
  - An issue matrix that favours them
  - No great desire for a change
- The three most likely scenarios that would lead to a Liberal defeat include:
  - The Tories succeed in building their leader's favourables and effectively use leadership as a wedge
  - The NDP change channels to social justice and environmental issues and generate a minority government
  - The media breaks one or more significant controversies regarding the government and builds time for a change sentiment
- The public is only now becoming engaged and many will remain open to new information right up to election day

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