

Provincial Party ID and Vote

Methodology

- This presentation combines the results of three different surveys:
 - An online survey of 846 adult Ontarians on values and politics conducted from October 26th to November 8th, 2017. (Poll 1)
 - An online survey of 1,406 adult Ontarians on infrastructure and electricity conducted from November 10th to November 16th, 2017. (Poll 2)
 - A telephone study of 607 randomly-selected Ontario residents, 18 years of age and older, from November 9th to November 17th, 2017 (Poll 3)
- Detailed methodologies are provided in the appendix.
- It is important to note that margins of error can only be applied to the telephone survey.
 - The online surveys ARE representative samples. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.
- The margin of error for the telephone survey is approximately ± 4.0 (before April 2003: approximately ± 3.84)

Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Provincial Vote Tracking: PCs (32%) steady, Liberals gain 3 points now at 24%; NDP drop 4 points to 15%

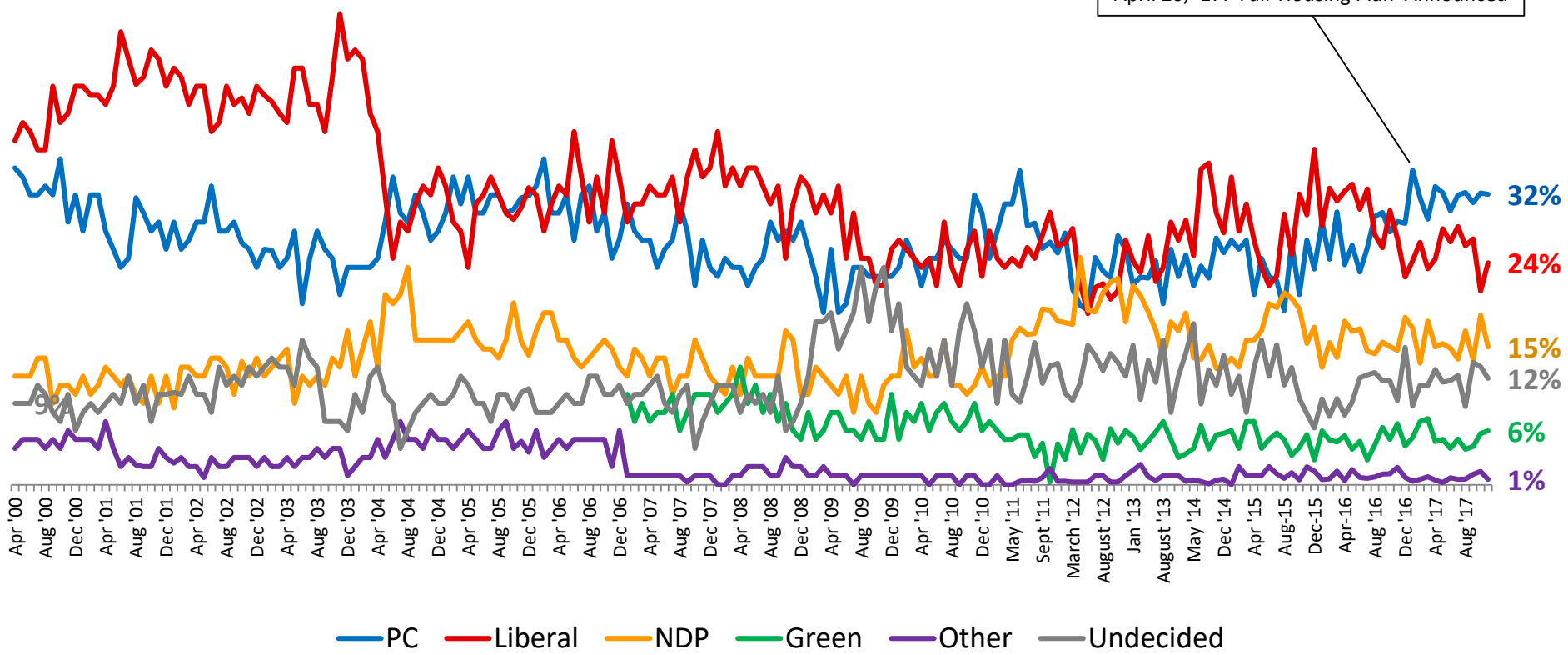


If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party?

... In that case, which party's candidate do you lean toward slightly? [Vote + Lean]

[asked of all respondents; n=600]

March 2, '17: 'Fair Hydro Plan' Announced
April 20, '17: 'Fair Housing Plan' Announced



(Current data: November 2017)

Poll 3: Telephone: Provincial Politics

Note: 'Refused/Would not vote' not shown

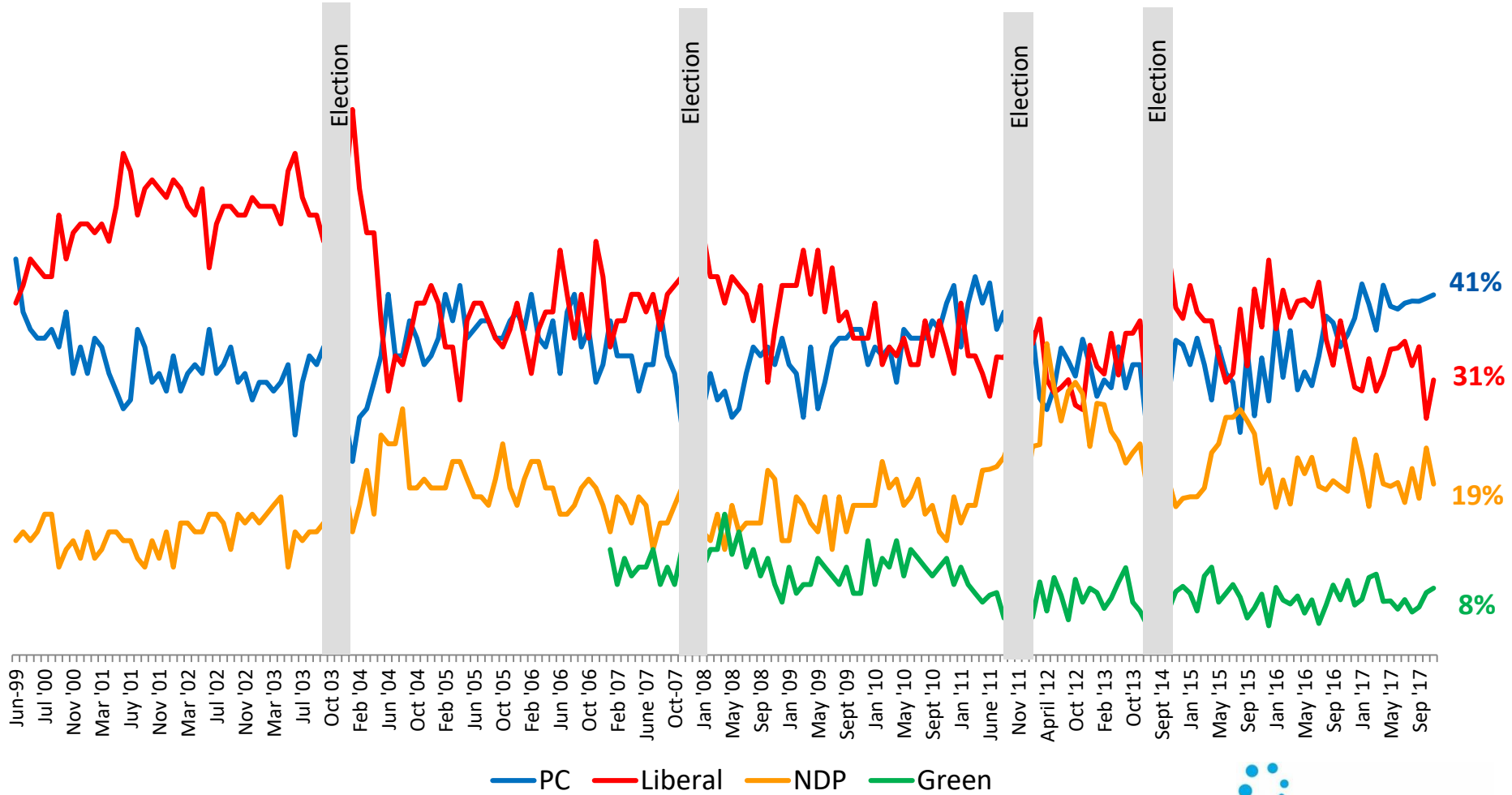


Provincial Decided Vote Tracking: PCs (41%) steady in 1st, Liberals gain 4 points (31%), NDP drops to 19%



If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party? In that case, which party's candidate do you lean toward slightly? [DECIDED VOTE]

[only decided voters, n=470]



(Current data: November 2017)

Poll 3: Telephone: Provincial Politics

Note: 'Other' not shown



Value Questions and Cluster Tracking

We asked a series of **value questions** in this survey with tracking back to a June 2014 online post-election study. We use **cluster** analysis to group respondents who share common sets of values to better understand the motivations and needs of voters. Clusters in each survey are based on the same solution and the same four values in each study.

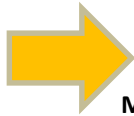
Value Questions

Common sense VS
experts

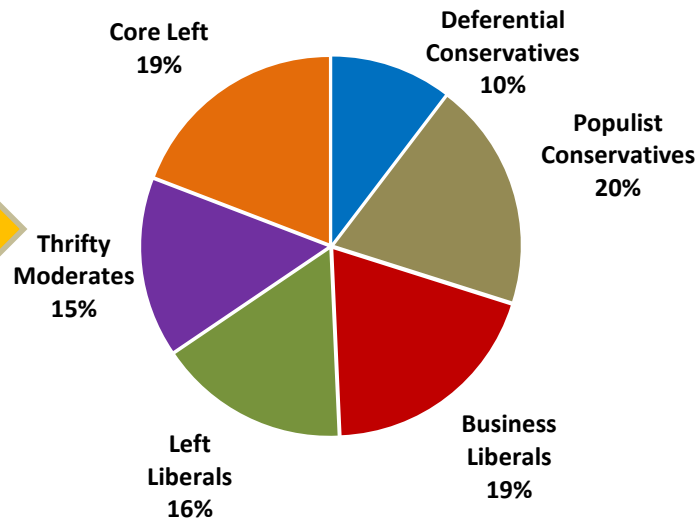
Public need VS.
Ability to afford

Redistribute
wealth vs. equal
opportunity

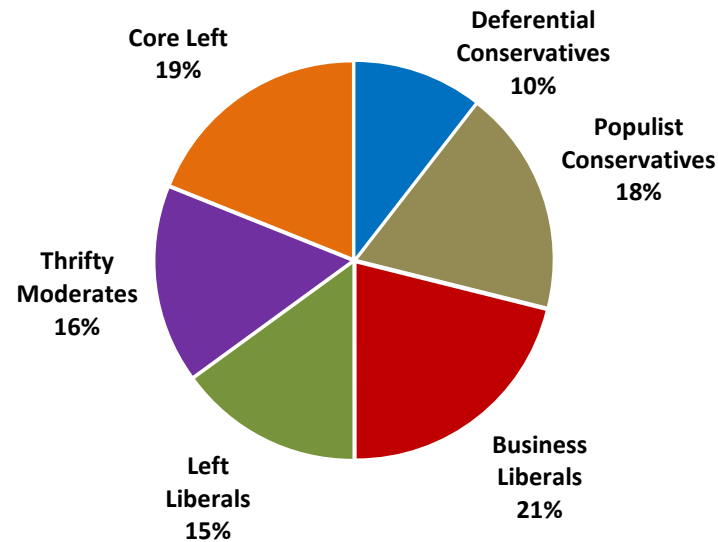
Profit brings out
worst vs. teaches
values of hard
work



June 2014 Value Clusters



October 2017 Value Clusters



Values by Cluster (2017)

Values		Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Is the main role of government...	Create equal opportunity	77%	88%	66%	95%	42%	0%
	Redistribute wealth	17%	8%	19%	0%	35%	94%
	Don't know	6%	4%	14%	5%	23%	6%
The profit system...	Brings out the worst in human nature	0%	0%	0%	79%	69%	87%
	Teaches people value of hard work	91%	91%	87%	0%	0%	0%
	Don't know	9%	9%	13%	21%	31%	13%
Governments should make spending decisions based on...	Ability to afford	90%	93%	0%	0%	82%	0%
	Public's need	0%	0%	96%	90%	0%	93%
	Don't know	10%	7%	4%	10%	18%	7%
When it comes to government decision making...	Too often govt listens to experts instead of common sense	0%	100%	49%	60%	38%	35%
	Government should listen to experts	81%	0%	36%	27%	32%	46%
	Don't know	19%	0%	16%	12%	30%	19%

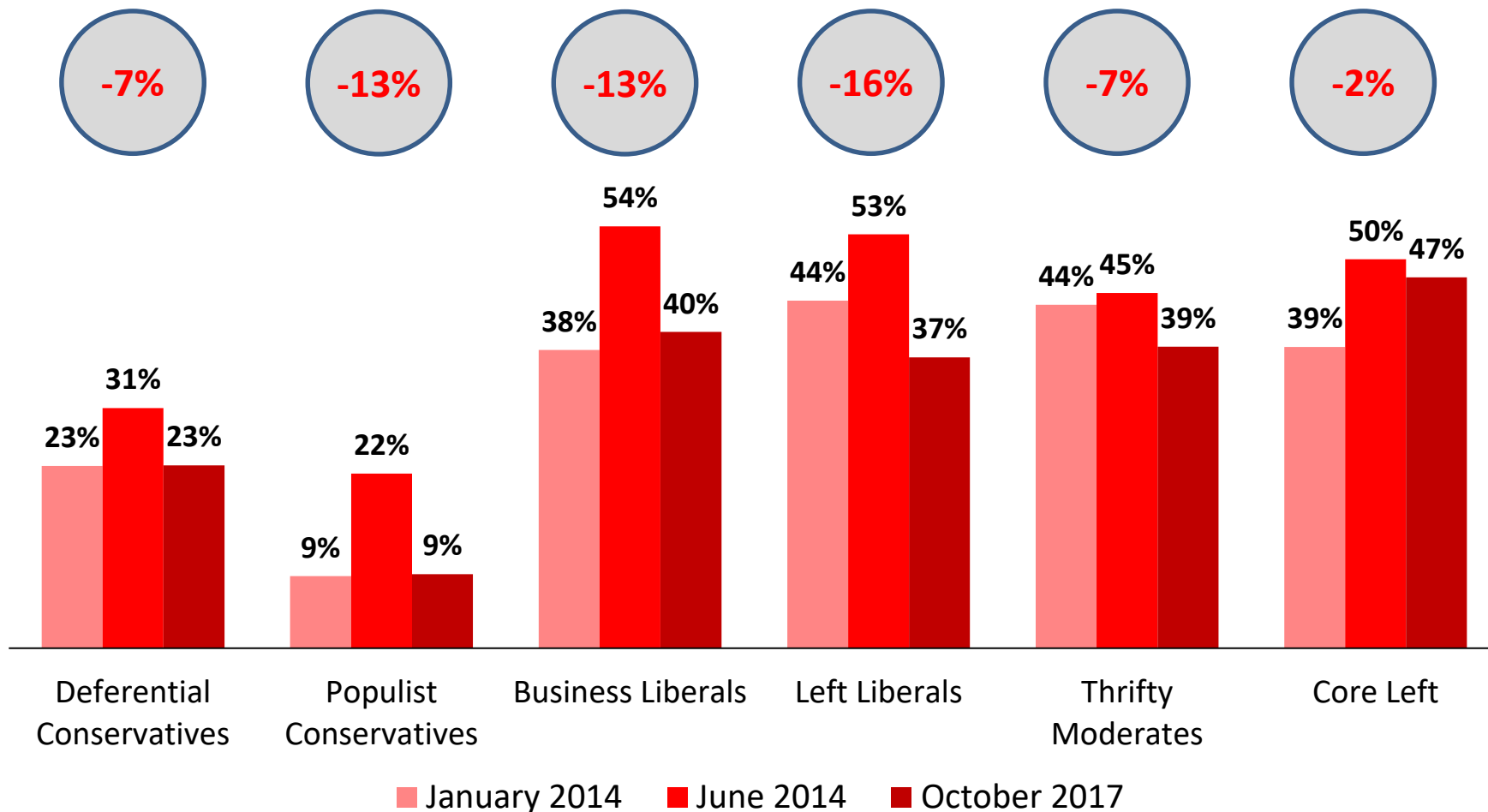
Vote by Cluster: Liberals hold ground with Core Left, lose ground to PCs on Moderates, NDP on Left Libs

Decided Vote	Deferential Conservatives		Populist Conservatives		Business Liberals		Left Liberals		Thrifty Moderates		Core Left	
	2014	2017	2014	2017	2014	2017	2014	2017	2014	2017	2014	2017
Liberal	31%	23%	22%	9%	54%	40%	53%	37%	45%	39%	50%	47%
Progressive Conservative	46%	66%	70%	70%	21%	27%	13%	15%	22%	42%	8%	8%
NDP	14%	4%	7%	11%	19%	25%	20%	34%	22%	11%	30%	35%
Green	10%	6%	3%	4%	4%	4%	13%	12%	7%	6%	11%	9%
Other	0%	0%	1%	4%	1%	3%	1%	1%	2%	2%	1%	1%



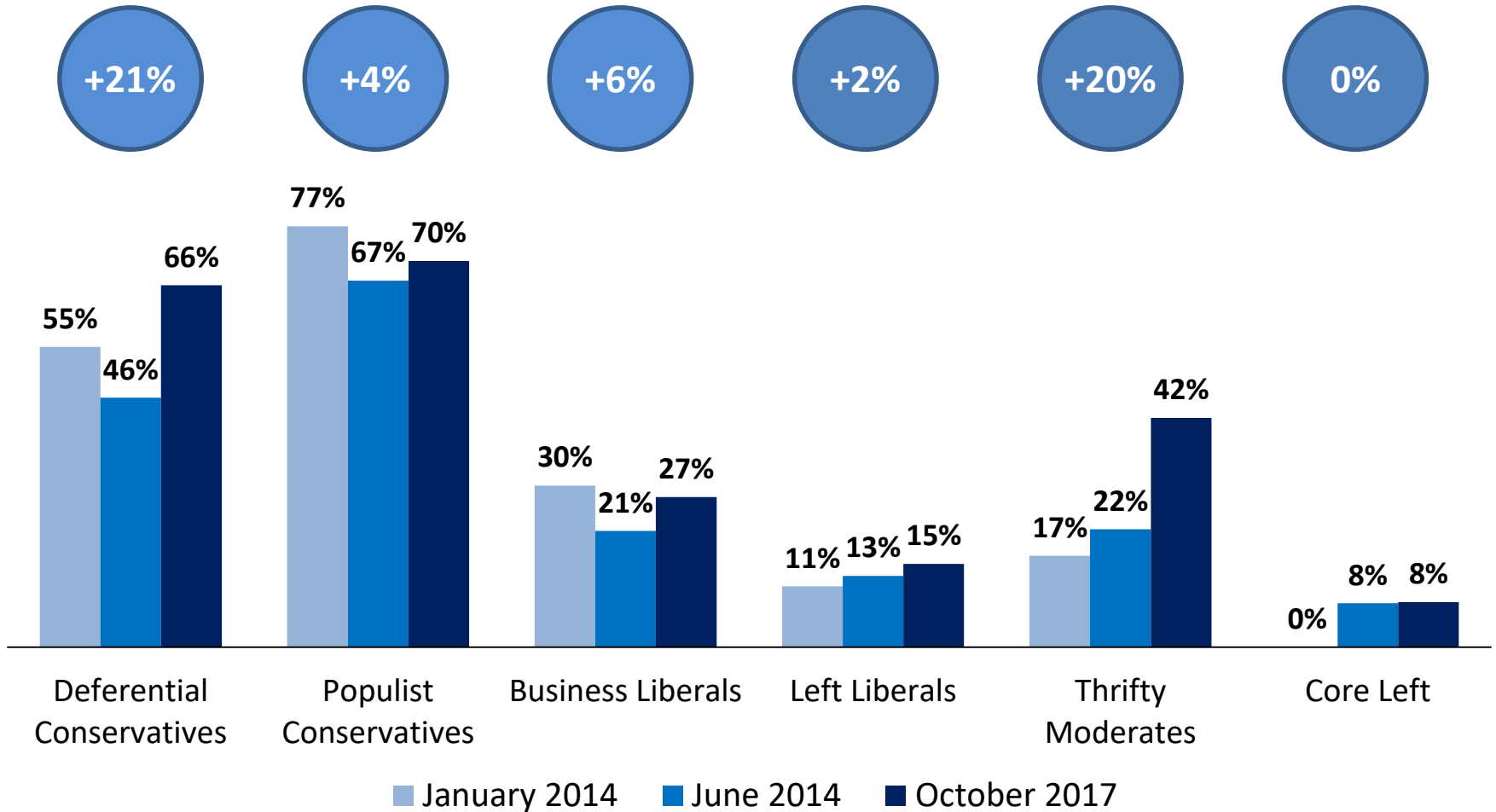
Liberal vote change by Cluster: Liberals hold the Core Left, but drop 16 points among Left Liberals

Change in Liberal decided vote compared to 2014 post-election study



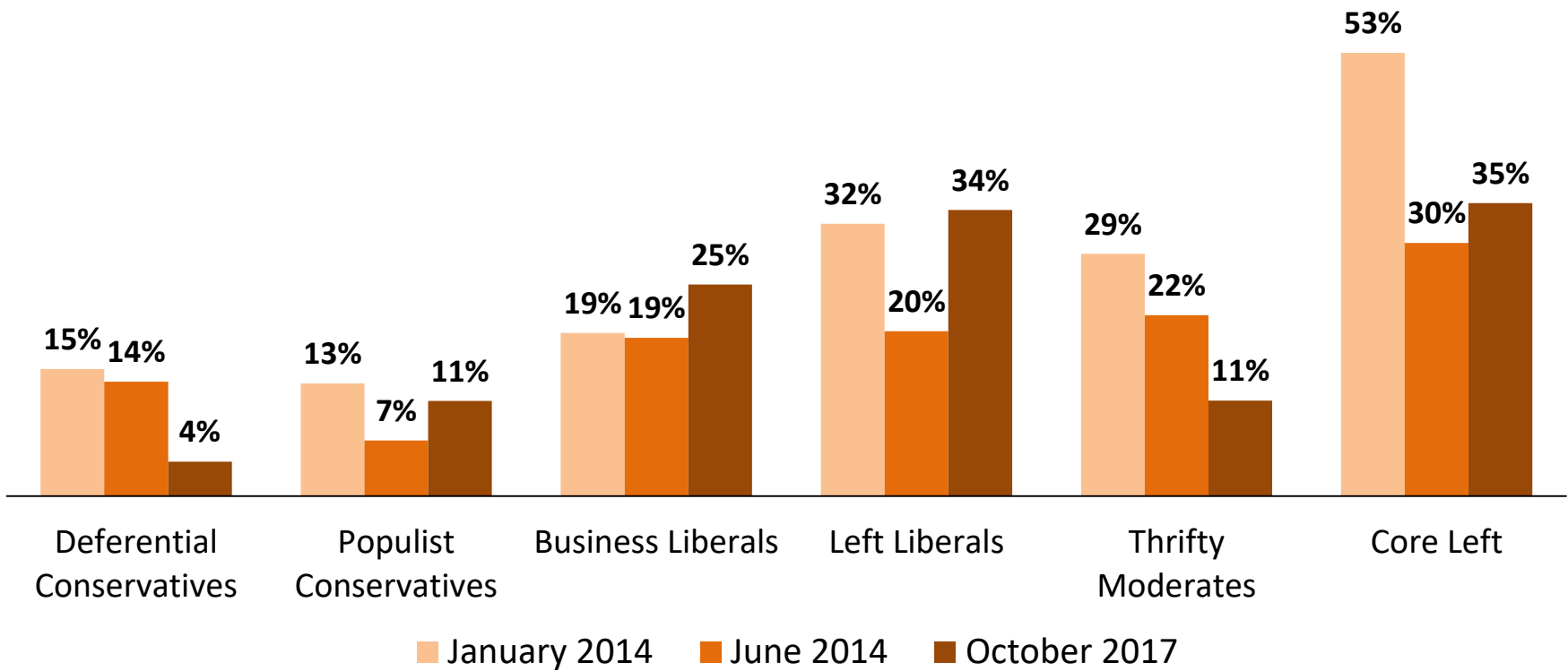
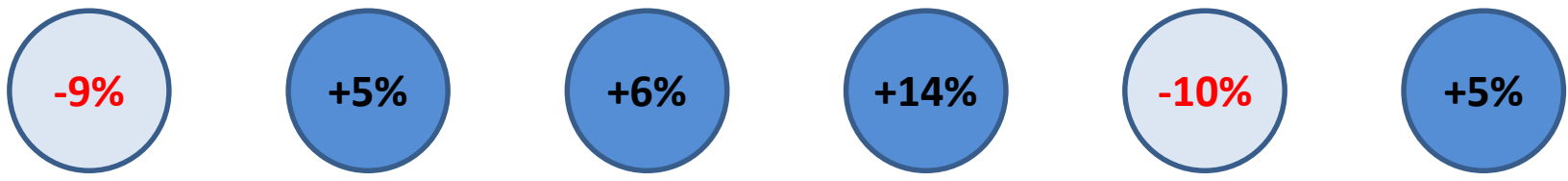
PC vote change by Cluster: large gains for PCs among Deferral Conservatives, Thrifty Moderates

Change in PC decided vote compared to 2014 post-election study



NDP vote change by Cluster: NDP back to competitive among Left Liberals, but lagging with core left

Change in NDP decided vote compared to 2014 post-election study



Leadership

Pre-writ Snapshot vs. 2017, Leaders: Wynne's favourables have plummeted; Brown gains ground since pre-writ on Best Premier

March 2014, Pre-writ

Best Premier

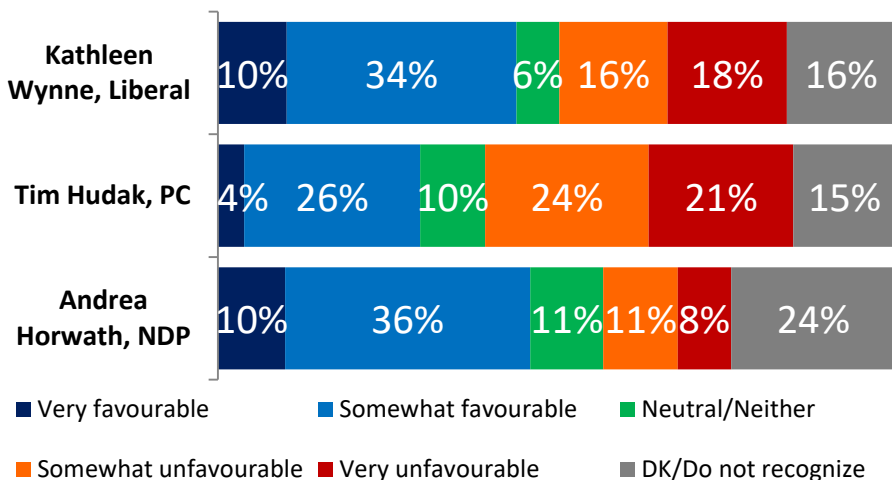
Q Which of the following leaders would make the best Premier of Ontario?



■ Kathleen Wynne, Liberal ■ Tim Hudak, PC
 ■ Andrea Horwath, NDP ■ Undecided/DK

Leader Favourables

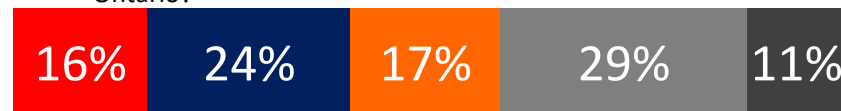
Q Below are the names of several individuals who have been mentioned in the news recently...



November 2017

Best Premier

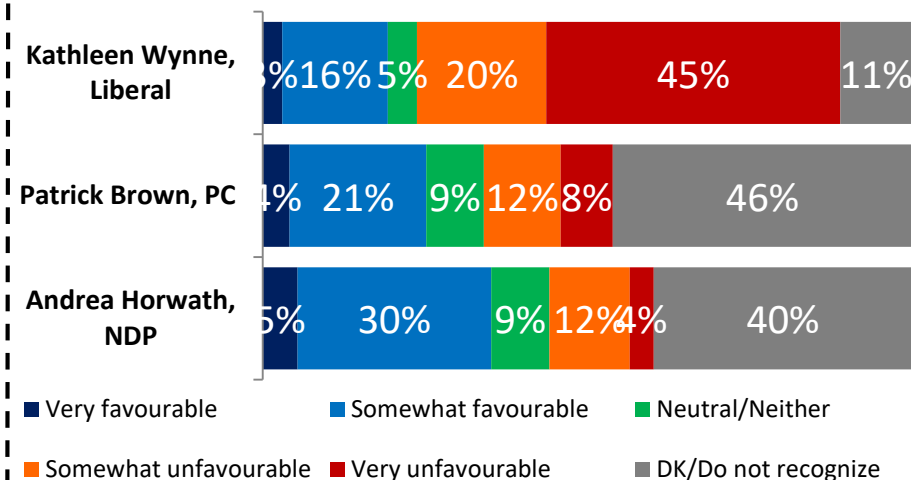
Q Which of the following would make the best Premier of Ontario?



■ Kathleen Wynne, Liberal ■ Patrick Brown, PC
 ■ Andrea Horwath, NDP ■ Undecided/DK

Leader Favourables

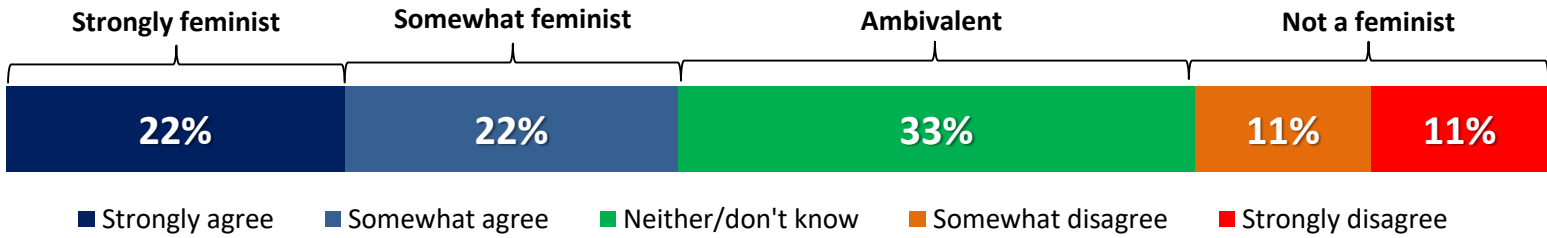
Q Below are the names of several individuals who have been mentioned in the news recently...



Feminist Values: Liberals and NDP who ID as “strongly feminist” most likely to think Wynne changed things for better

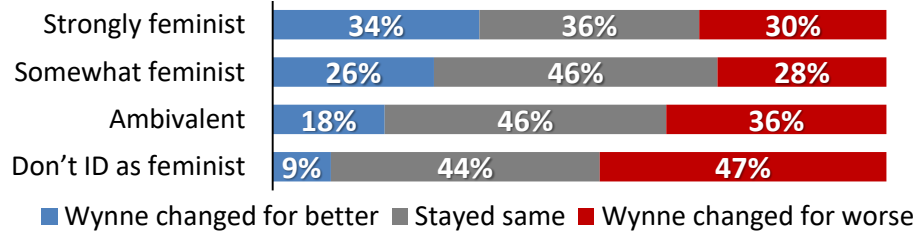


Do you agree or disagree with the following statements: *I personally would describe myself as a feminist*
 [asked of all respondents, n=500]

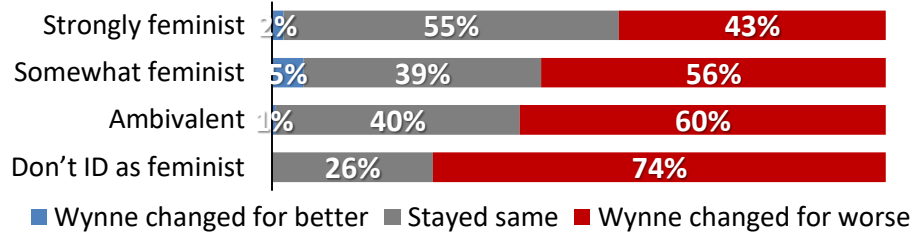


Value impact of Wynne Performance *within* Party ID

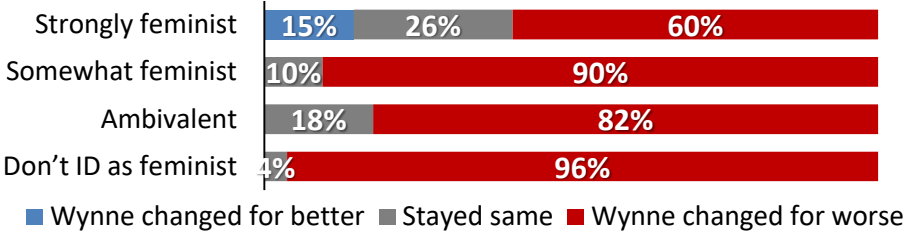
Liberal ID (n=186)



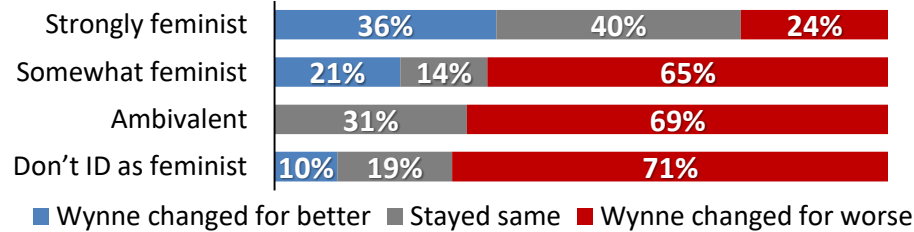
Unaligned (n=100)



PC ID (n=121)*



NDP ID (n=60)*



*Note: some individual cell sizes less than n=10.

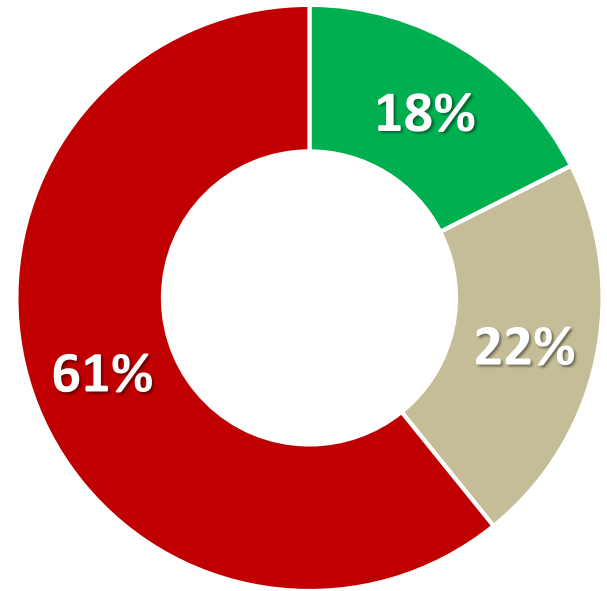
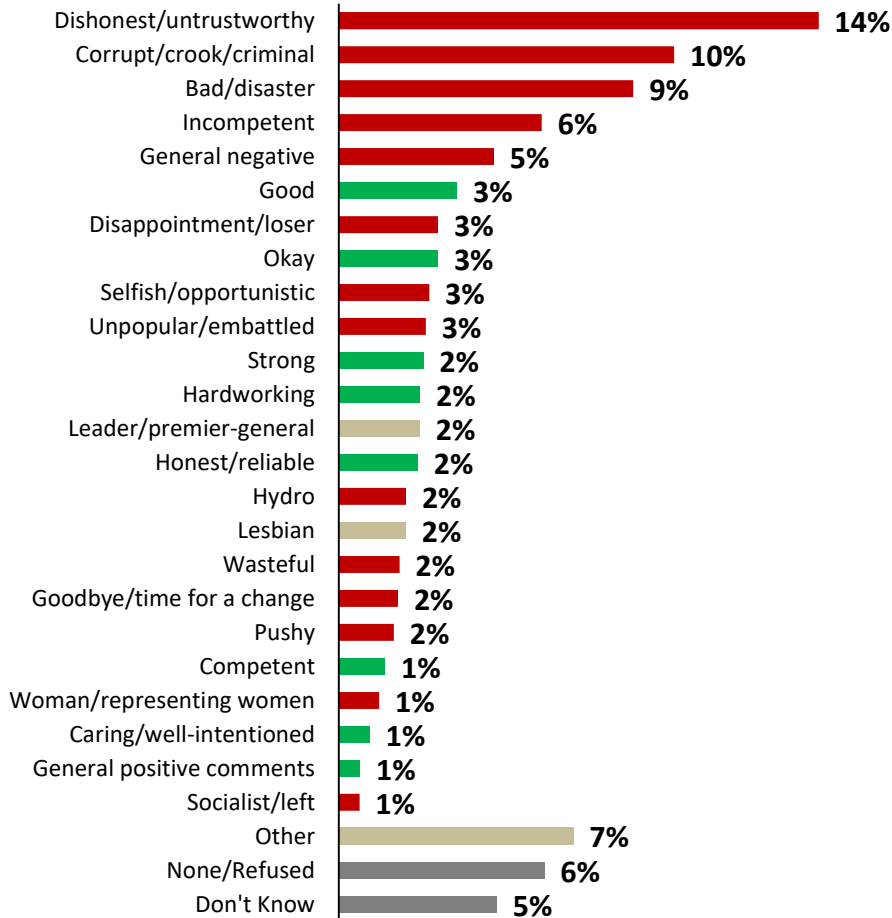


One word to describe Wynne: Negative responses outnumber positives by more than 3 to 1



What is the first word that comes to mind when you think of **Kathleen Wynne, leader of the Ontario Liberal Party**?

[asked of all respondents, n=500; open-ended]



- Positive comments
- Neutral/Unclear/None/Don't Know
- Negative comments

NOTE: Inappropriate language has been removed from the chart.

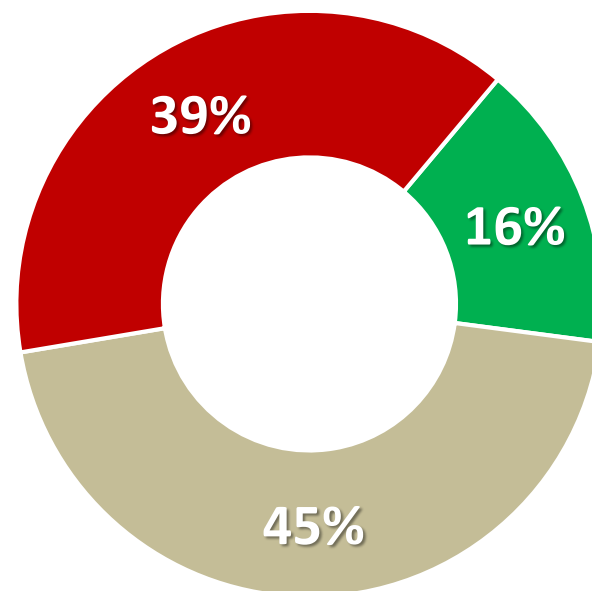
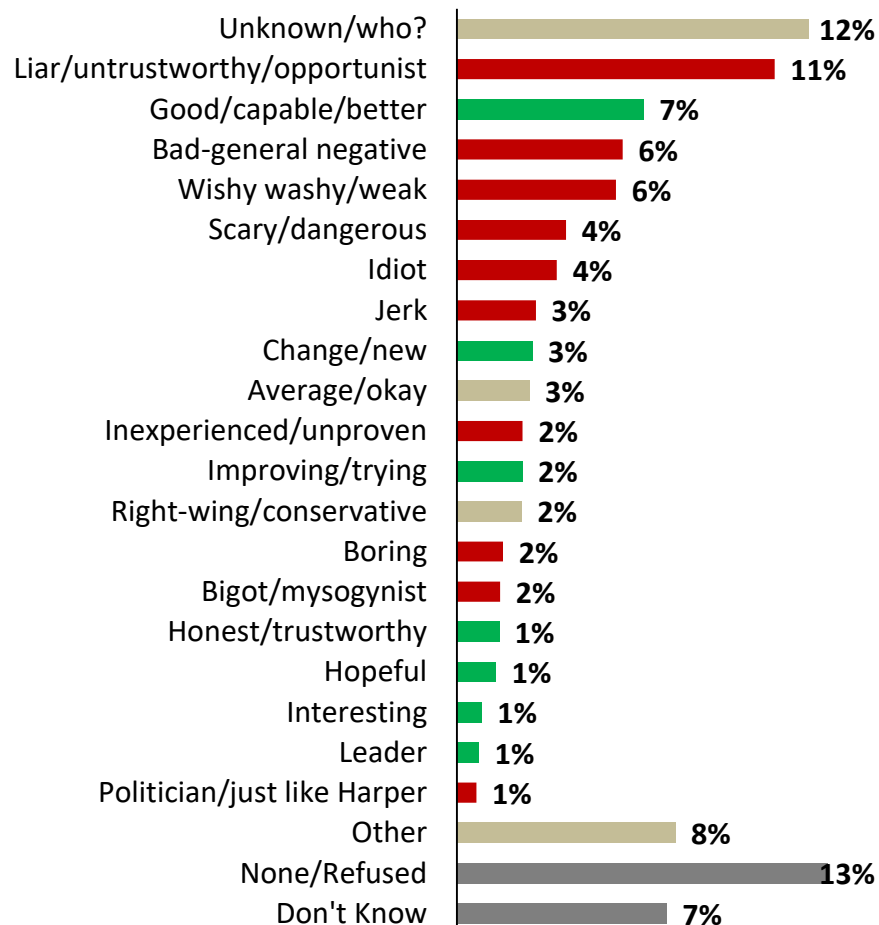
Poll 1: Online: Values & Politics

One word to describe Brown: Many are neutral, but those with a view much more likely to be negative

Q

What is the first word that comes to mind when you think of **Patrick Brown, leader of the Ontario PC Party**?

[asked of all respondents, n=500; open-ended]



- Positive comments
- Neutral/Unclear/None/Don't Know
- Negative comments

One word to describe Brown (Overall): Word Cloud



What is the first word that comes to mind when you think of Patrick Brown, leader of the Ontario PC Party
[asked of all respondents, n=500; open-ended]



NOTE: Responses of “don’t know” and those using inappropriate language have been removed from the word cloud. Words with a count of 1 have been removed.

Poll 1: Online: Values & Politics

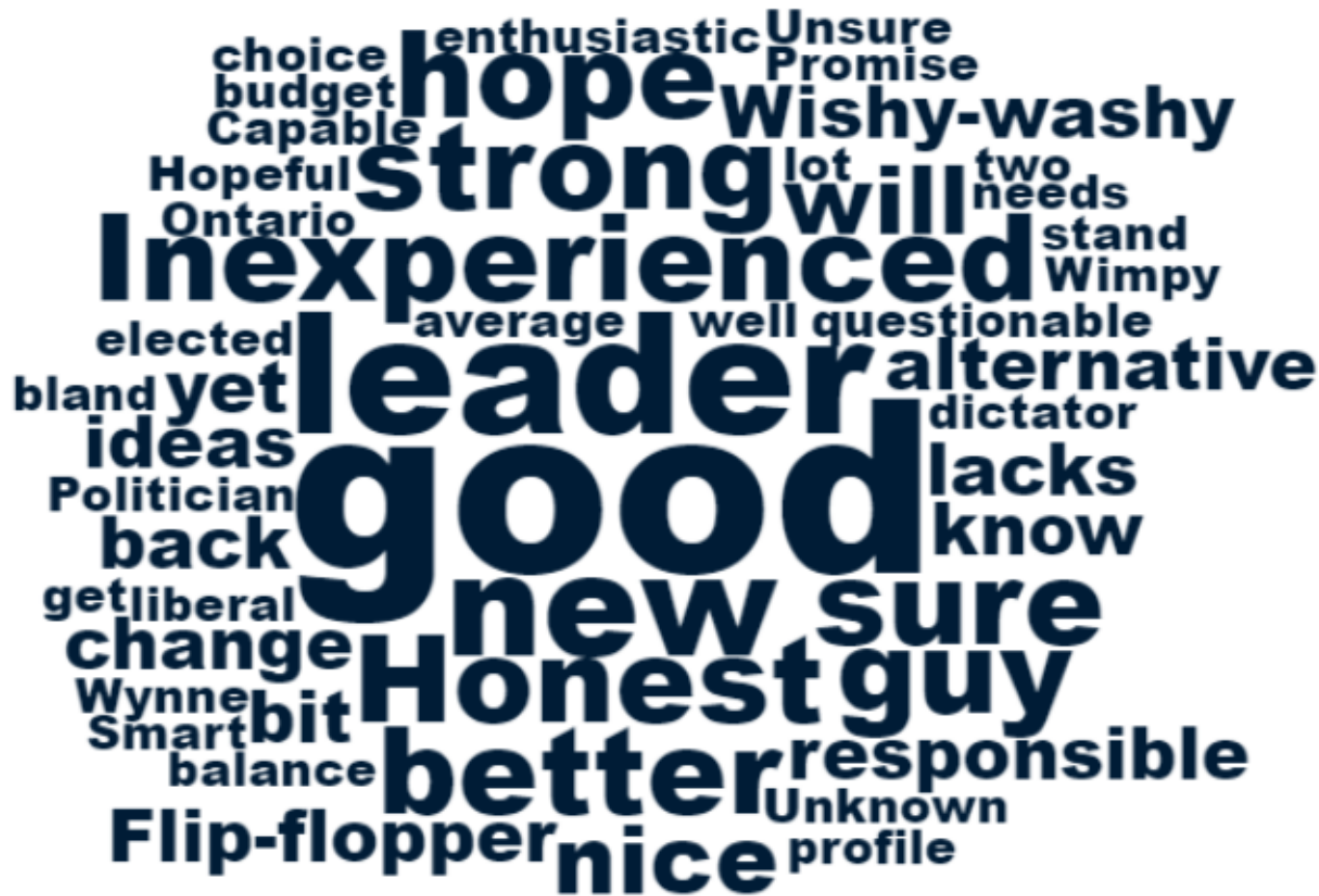


One word to describe Brown (PCs): Word Cloud

Q

What is the first word that comes to mind when you think of Patrick Brown, leader of the Ontario PC Party

[asked of all respondents, n=500; open-ended]



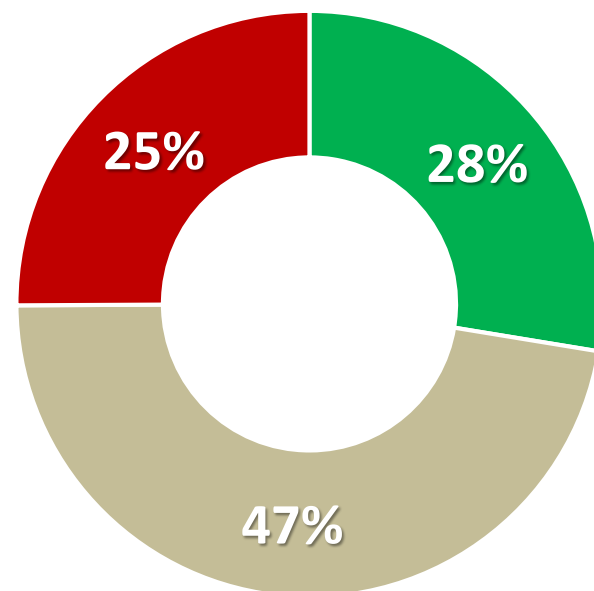
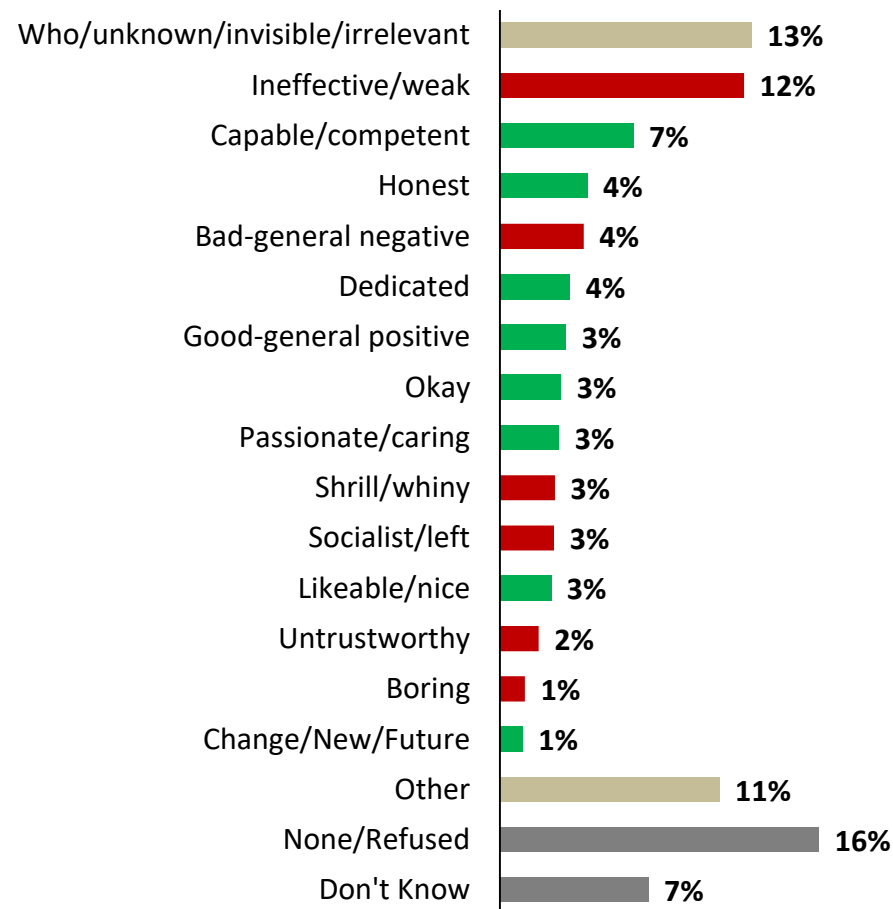
NOTE: Responses of “don’t know” and those using inappropriate language have been removed from the word cloud. Words with a count of 1 have been removed.

One word to describe Horwath: Many also undecided on Horwath, but positives equal with negatives



What is the first word that comes to mind when you think of **Andrea Horwath, leader of the Ontario NDP**?

[asked of all respondents, n=500; open-ended]



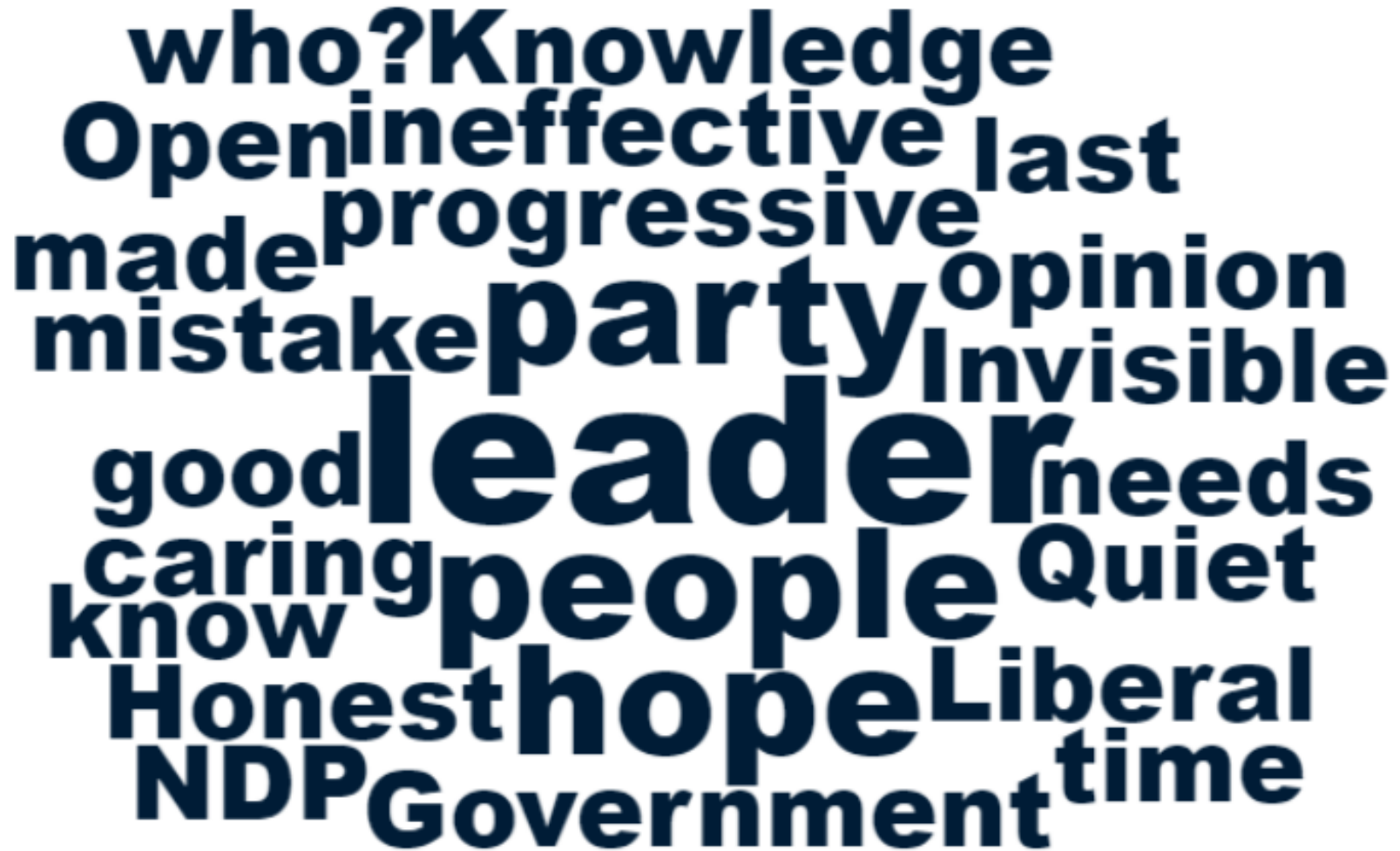
- Positive comments
- Neutral/Unclear/None/Don't Know
- Negative comments

One word to describe Horwath (NDP): Word Cloud

Q

What is the first word that comes to mind when you think of Andrea Horwath, leader of the NDP

[asked of all respondents, n=500; open-ended]



NOTE: Responses of “don’t know” and those using inappropriate language have been removed from the word cloud. Words with a count of 1 have been removed.

Poll 1: Online: Values & Politics

Key Take-Aways

- The heat is coming out of the electricity issue in Ontario.
- Ontarians say they want regulators to lead on decision-making, but at the end of the day will vent their frustrations on politicians.
- The PCs have a real lead but seem to have plateaued with the support of one in three Ontarians.
- The Liberals remain in the race because Ontarians hold pluralistic values. However, recently they have been losing moderate Ontarians to the NDP. This effectively strengthens the PCs prospects.
- On leadership, Wynne is in a deep hole but this is no love-in for her opponents. For the Liberals, dragging Brown down may be easier than lifting Wynne up.



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