Roads to Victory

THE ONTARIO POLITICAL LANDSCAPE

Research Report

March 28, 2014

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The Ontario Political Landscape: March 2014

Greg Lyle, President of Innovative Research Group Inc. (INNOVATIVE), released the results of two surveys this morning at a Public Affairs Association of Canada (PAAC) gathering held in downtown Toronto. The two surveys (one conducted by telephone, the other online – see methodological information at the end of this document) addressed the key question for campaign strategy: "Who will vote for you and why?"

In his presentation, Lyle covered current provincial vote intent, the issues, the parties and their leaders. He then laid out a Road to Victory for each of the three major political parties.

For the full results, please refer to the presentation slides.

Summary of Findings

Desire for a Spring Election and Decided Vote
One quarter of Ontarians (24%) think a spring election would be a good idea, while another quarter (26%) may not like the thought of an election but feel it may be the only way to get the change we need. Less than half (44%) feel an election this spring would be a waste of time and money.

Decided (excluding those who are unaligned or who would not vote) provincial vote intent has the Liberals at 38%, followed by the Progressive Conservatives at 33% and the NDP trailing at 25%.
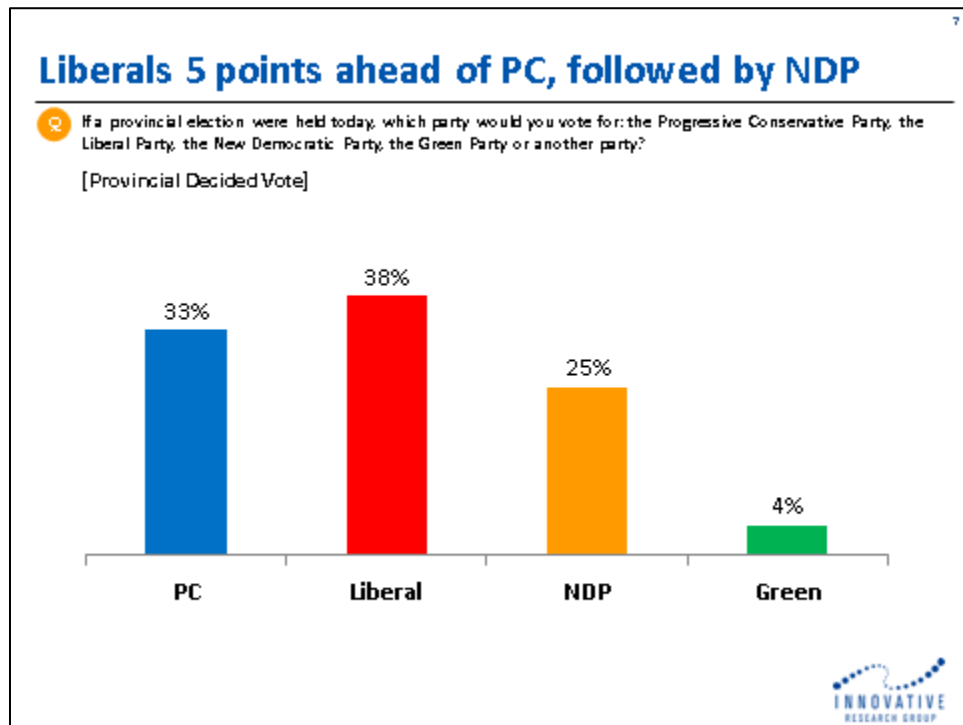
Lyle pointed out, however, that it's about seats and not votes, citing as an example the 2011 Federal election, when the Liberal Party garnered about the same share of vote as the NDP (25% and 26%, respectively), but they won only 11 seats, compared to the NDP's 22.

The Liberals are ahead in most regions of the province, with the exception of the South Central and South West regions where the PCs are dominant, and Northern Ontario which is an NDP stronghold.

In his presentation, Lyle described potential target audiences for parties to consider, based on party loyalty and personal values. The full results of this analysis are available in the presentation itself. Key findings include:

The Issues
More than half (55%) say that the need for more honest and accountable government is "absolutely critical", as rated on a scale from one to ten. The need for more jobs and economic development follows at 49%, and Ontario's billion deficit and its $288 billion debt comes in at 41%. The remaining four issues (the gap between rich and poor, the high level of taxation, environmental issues, and the need for more funding for key social services were deemed absolutely critical to one third or fewer.

Asked identify which of these seven issues was most important, the need for more jobs and economic development came out on top at 28%, followed by Ontario's billion deficit and its $288 billion debt and the need for more honest and accountable government at 18% each.

The Parties
More than half (53% "strongly" or "somewhat" agree) of Ontarians are afraid of what Tim Hudak and the PCs might do if they form government. Fewer than half (46%) feel that the Ontario Liberals have had their problems, but they are still the best party to form government. Two in five (41%) agree that the NDP under Bob Rae did such a bad job running the Ontario government in the 1990s that I don't think we can take a chance on letting them run the government again, and 35% say that After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again. The Liberal party enjoys a strong advantage on party identification, the measure of political brand strength.

The Leaders
Only three in ten (30%) of respondents have either a "very" or "somewhat" favourable impression of Tim Hudak. One in five (21%) have a "very unfavourable" impression of him. Two in five (39%) have a favourable impression of Andrea Horwath, while Premier Wynne has a favourability rating of 44%. Looking at net favourability (the difference between those with a favourable impression and those who don't), Andrea Horwath comes out on top at 27%, compared to Kathleen Wynne at 10% and Hudak at -18%. Wynne leads with 27% on best Premier with Horwath and Hudack tied at 18%.

Roads to Victory
At the end of his presentation, Lyle summarized a "Road to Victory" for each of the three provincial parties.

The NDP Road Forward:
1. **The NDP should have one primary goal** – to drive up anger, *time for a change*.
   - Many of the natural NDP voters are supporting the Liberals and <u>must</u> be shaken loose.
   - Key parts of the NDP's natural base remain excited about Kathleen Wynne personally. To be effective, the NDP a<u>ttacks must drag Wynne into the Liberal mud</u>.
   - This will take time. Wait for the election.

2. **The NDP's best attack comes from the perspective of fairness**. The NDP cannot beat the Liberals with a frontal attack on the economy, they need to focus on issues they do best on – *social justice* and *entitlement to social services*.
3. **Horwath is a great asset, but she is at best simply competitive with Wynne**. The NDP party is dwarfed by the Liberal brand. The NDP need an agenda with issues that are too far left for the Liberals to embrace as tests for *who really cares about fairness*.

The Tory Road Forward:
1. The Tory's are limited by both their brand and their leader.
2. They must find an agenda that can reach into the moderate and progressive side of the spectrum and pull votes in their direction.
3. *Controlling government costs* has strong potential to be that issue. The Liberals are too competitive on the economy for *jobs* to work and nothing else shares the same salience.
4. It also has the potential to provide a "shield" narrative to help deflect "Working Families" ads.
5. The challenge is to prevent that issue from becoming a proof point of "Tory meanness". They need to build a narrative around Tim Hudak's competitiveness on "*shares my values*" and focus on the "*why*" of the policy rather than the "*what*".
6. They also need to drive urgency. It's tough. Can't we wait?

The Liberal Road Forward:
1. **The Liberals are well positioned to hold onto a minority government**.
    * They have the biggest voter pool and the strongest party brand.
    * Their leader has the most favourable; a core advantage in strong leadership.
    * Despite 10 years in power with all the scandals that come with it, there is no passion in any desire for change.
2. **The Liberals need to rally the center and left vote**. That vote is looking for the 2003 Liberals creating greenbelts and rebuilding public services. They need to be those Liberals.
3. **They need to stop only meeting and start doing**. They are the government. They don't need to promise. They can just do.
4. **They should make their promises before the writ and focus the election on the Tory threat**. This will mobilize their base, rally potential NDP voters and limit potential Tory defections.

Survey Methodologies
This presentation combines results from two Innovative Research Group, Inc. surveys:

Ontario This Month
* An RDD sample of 600 households with listed telephone numbers, conducted March 15th to 25th, 2014
* Weighted according to 2011 Census data to ensure the sample is representative of the actual population of Ontario
* Margin of error for a sample of this size is ± 4.0 percentage points, 19 times out of 20
* Innovative Research also created a combined database of 4,800 telephone interviews completed since Premier Wynne took office to look at regional results. The sample sizes and associated margins of error for the regional analysis are as follows:
    * Toronto Centre: n=538, margin of error ±4.2%
    * Outer Toronto: n=491, margin of error ±4.4%
    * West Metro Belt: n=617, margin of error ±4.0%
    * North/East Metro Belt: n=590, margin of error ±4.0%
    * South West Ontario: n=547, margin of error ±4.2%

- South Central Ontario: n=724, margin of error ±3.6%
- Eastern Ontario: n=631, margin of error ±3.9%
- Central Ontario: n=362, margin of error ±5.2%
- Northern Ontario: n=320, margin of error ±5.5%

Canada 20/20
- A representative online sample of 1,017 Ontario adults, conducted March 21st to 26th, 2014
- Weighted according to 2011 Census data to ensure the sample is representative of the actual population of Ontario
- Margin of error is not applicable to online surveys, not a random sample

This research used telephone for incidence and online for insights.