

So what now... ▶▶



Toronto Board of Trade Presentation

February 21, 2006

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Methodology

- A series of online surveys conducted among the approximately 7000 current members of the Canada 20/20 panel.
- Anyone interested in participating in these surveys can join the Canada 20/20 panel by going to Canada2020.com and completing the enrolment survey. However, our base sample was recruited through a series of invitations emailed by Rogers Publishing and Canadians recruited through Innovative's telephone surveys. Our core analysis is based on those who respond to email invitations.
- On a typical week we received approximately 4,100 responses eligible for inclusion in our analysis. After weighting a sample of this size the aggregated results are considered accurate to within ± 1.5 percentage points, 19 times out of 20, of what they would have been had a representative cross-section of Canadians eligible to vote been polled.
- The margin of error will be larger within each sub-grouping of the sample



Survey Dates

Survey Wave	Start Date	End Date
1st Wave	December 2, 2005	December 12, 2005
2nd Wave	December 13, 2005	December 19, 2005
3rd Wave	December 20, 2005	December 26, 2005
4th Wave	December 27, 2005	January 2, 2006
5th Wave	January 3, 2006	January 9, 2006
6th Wave	January 10, 2006	January 16, 2006
7th Wave	January 18, 2006	January 22, 2006
8th Wave (Post Election)	January 26, 2006	January 31, 2006
CTM	February 17, 2006	February 20, 2006



Thanks to

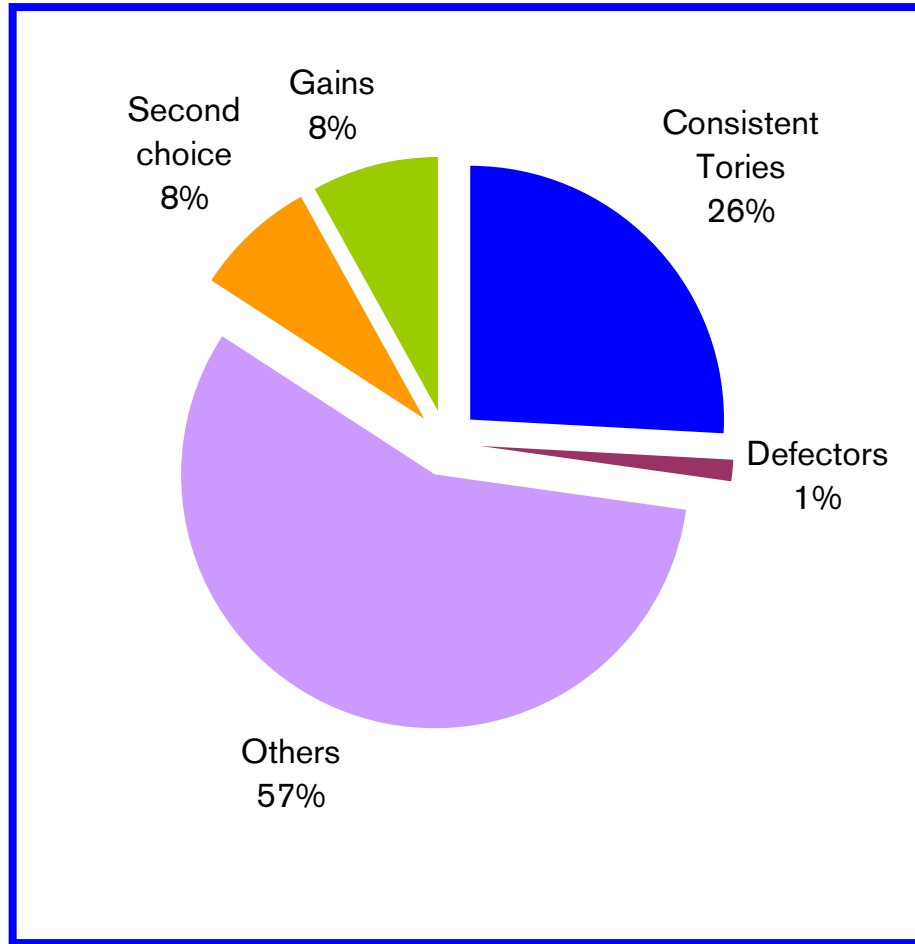


Where we left our story ▶▶

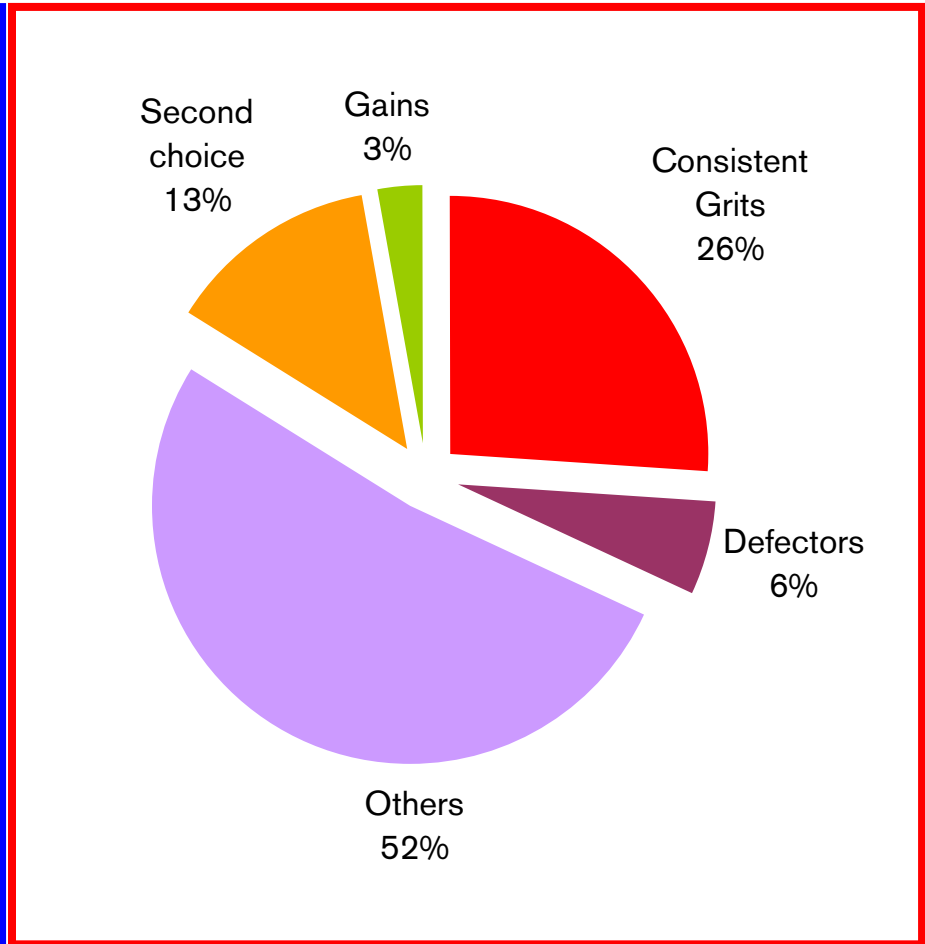


Universe on Election Eve

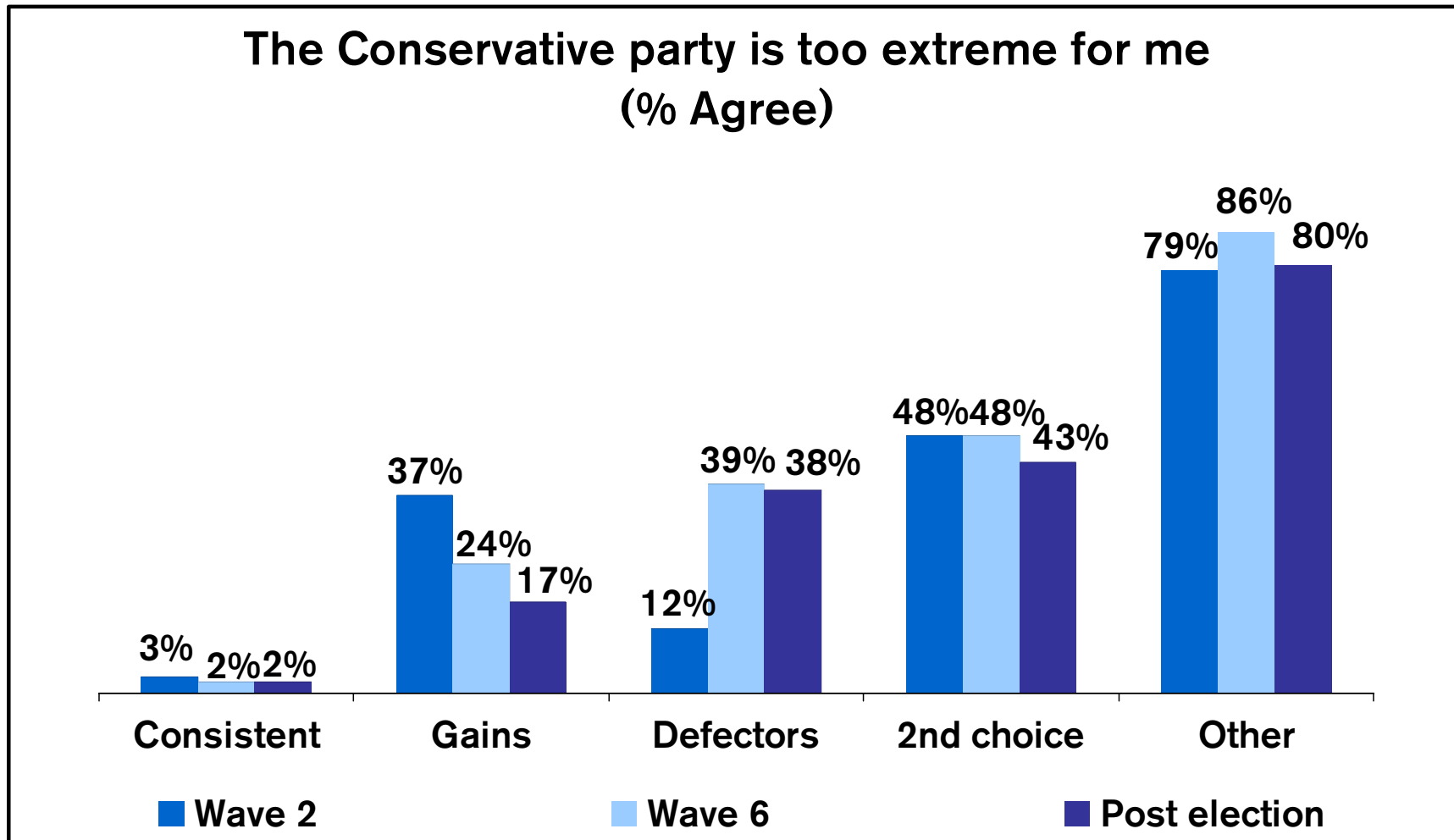
Tory Universe



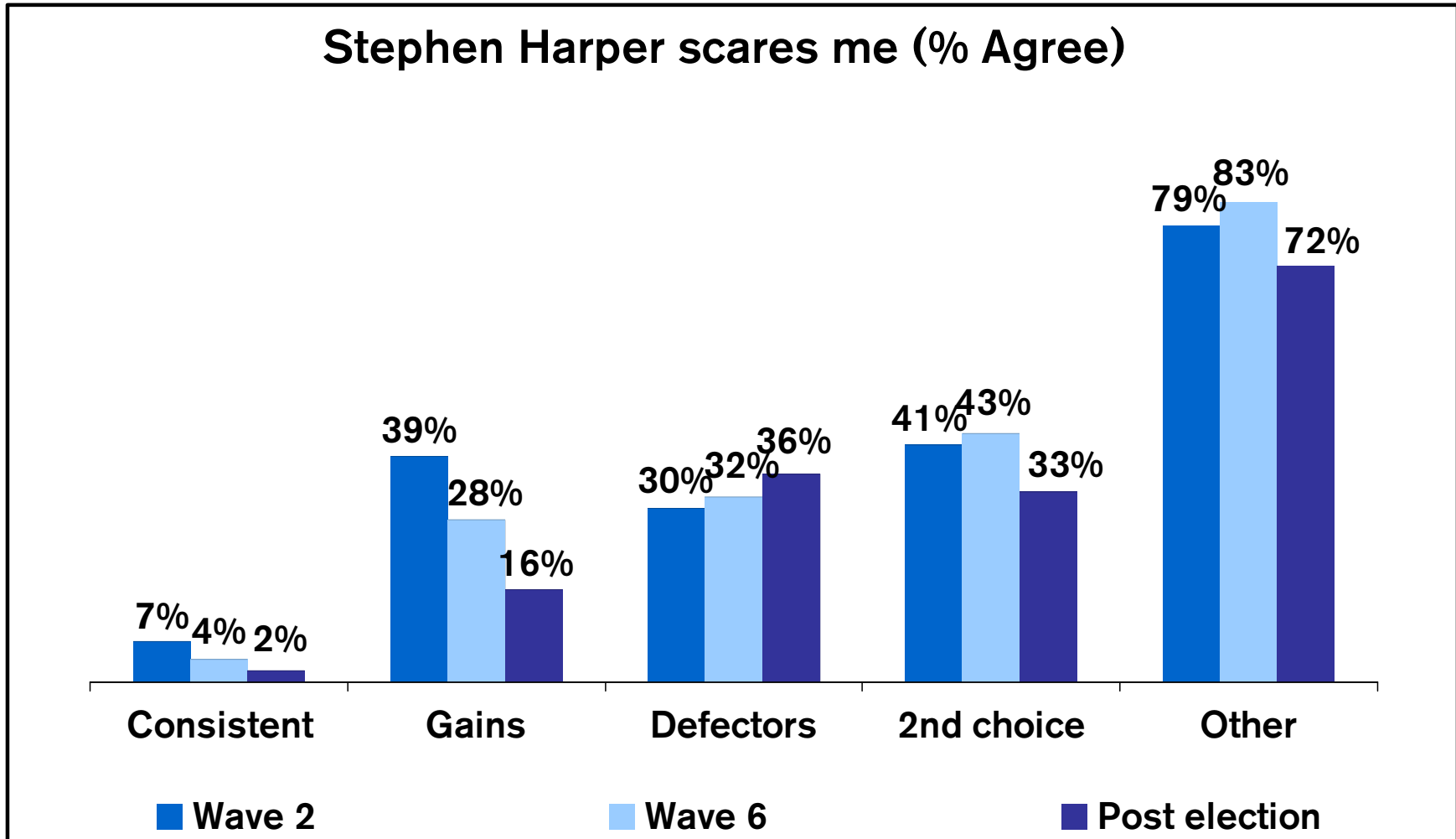
Liberal Universe



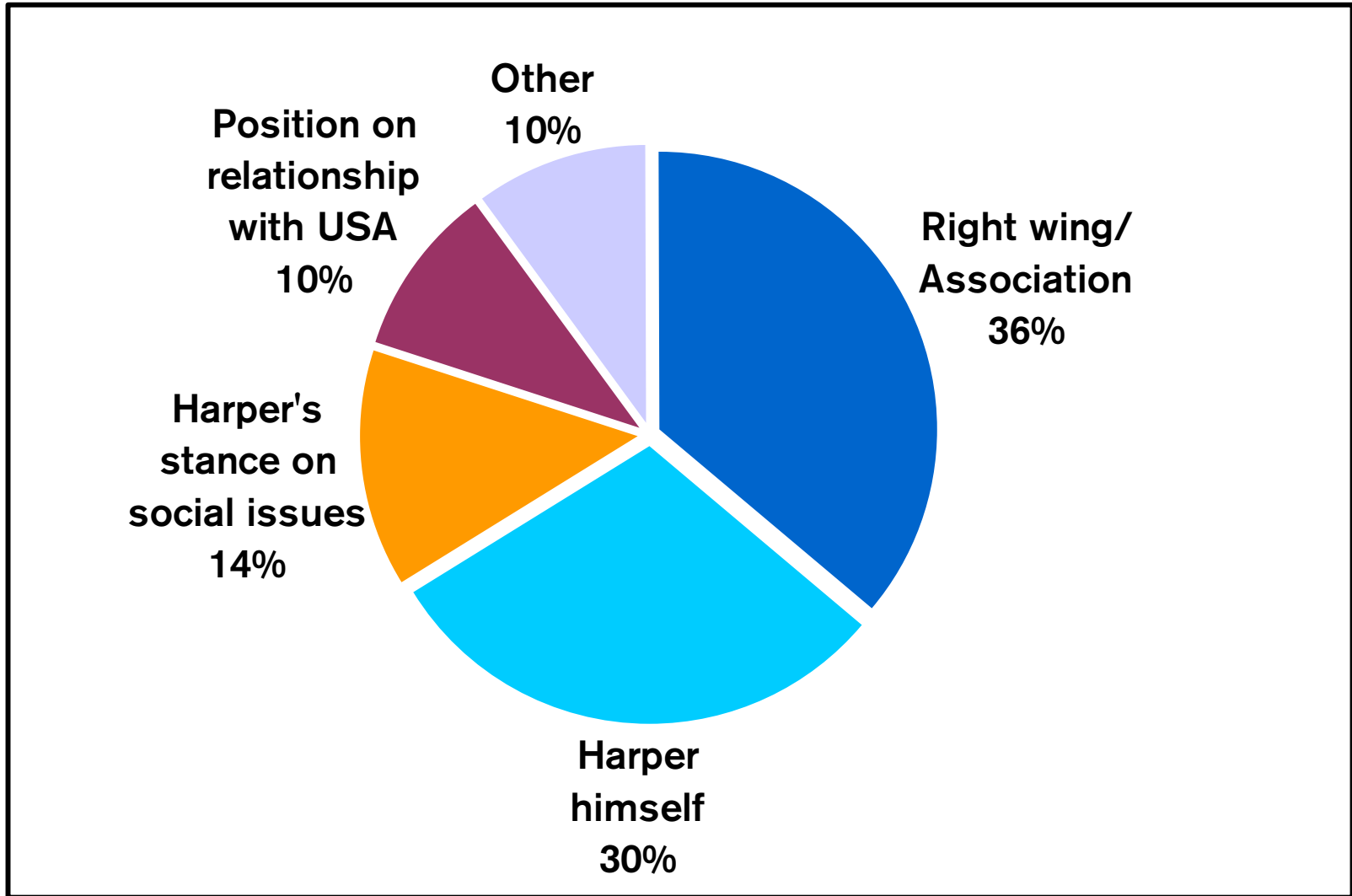
Conservative Party fails to budge perceptions



Harper less scary in most groups after campaign



Why is Harper Scary?



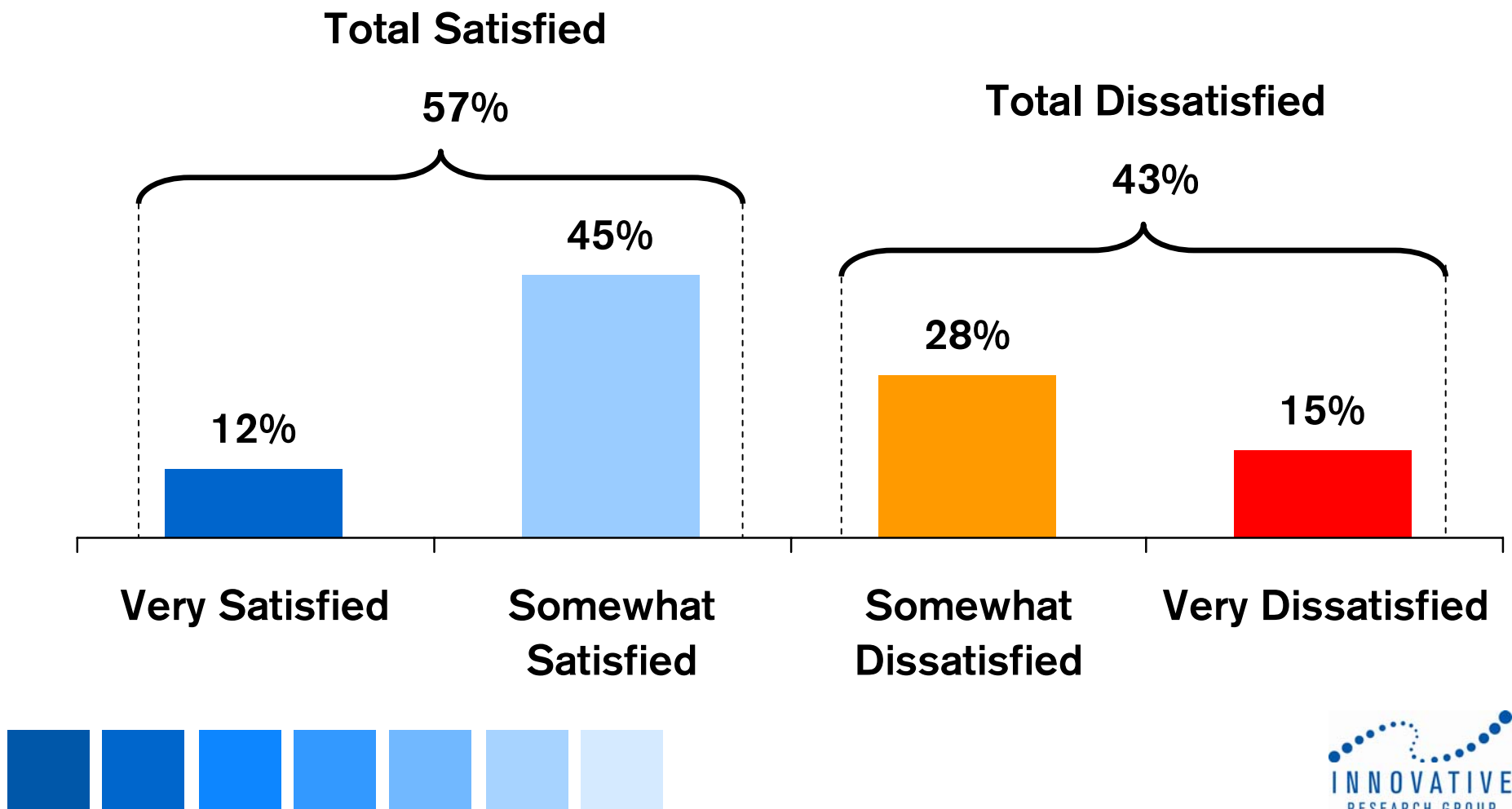
Mandate? ▶▶



Public generally satisfied with outcome of the election ¹¹

As you may know, as a result of the federal election held on January 23rd, the Conservative party will be forming a minority government.

Generally speaking, how satisfied are you with the outcome of the election...?



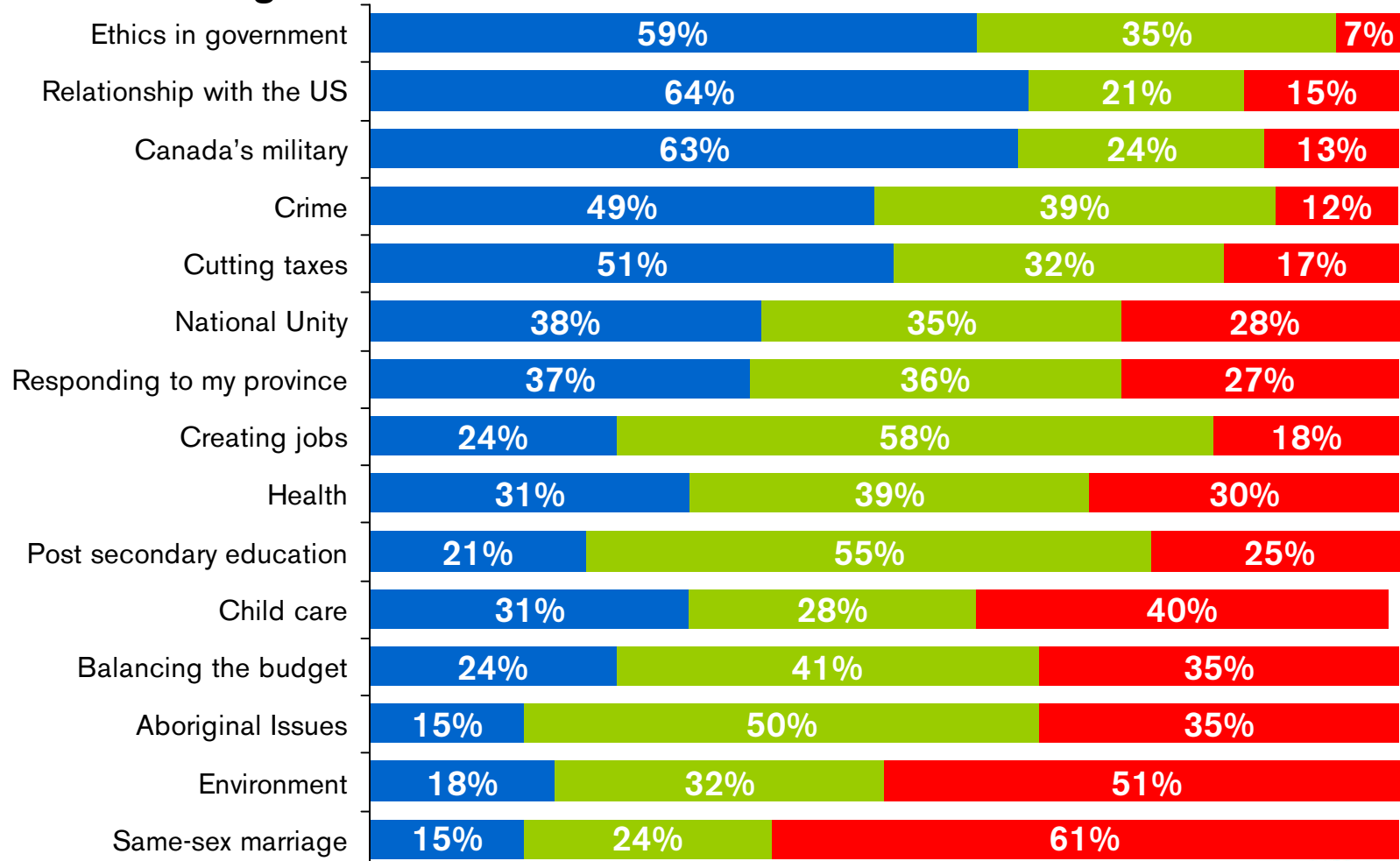
Why panelists chose their parties?

Conservative	Liberal	NDP	Bloc
Accountability and ethics (27%)	Agree with platform and policies (19%)	Agree with platform and policies (31%)	Defending Quebec's interests (47%)
Time for a change in gov't (23%)	Like local candidate (12%)	Social issues/programs (11%)	Agree with platform and policies (13%)
Agree with platform and policies (16%)	Strategic voting (10%)	Strategic voting (10%)	Like local candidate (6%)



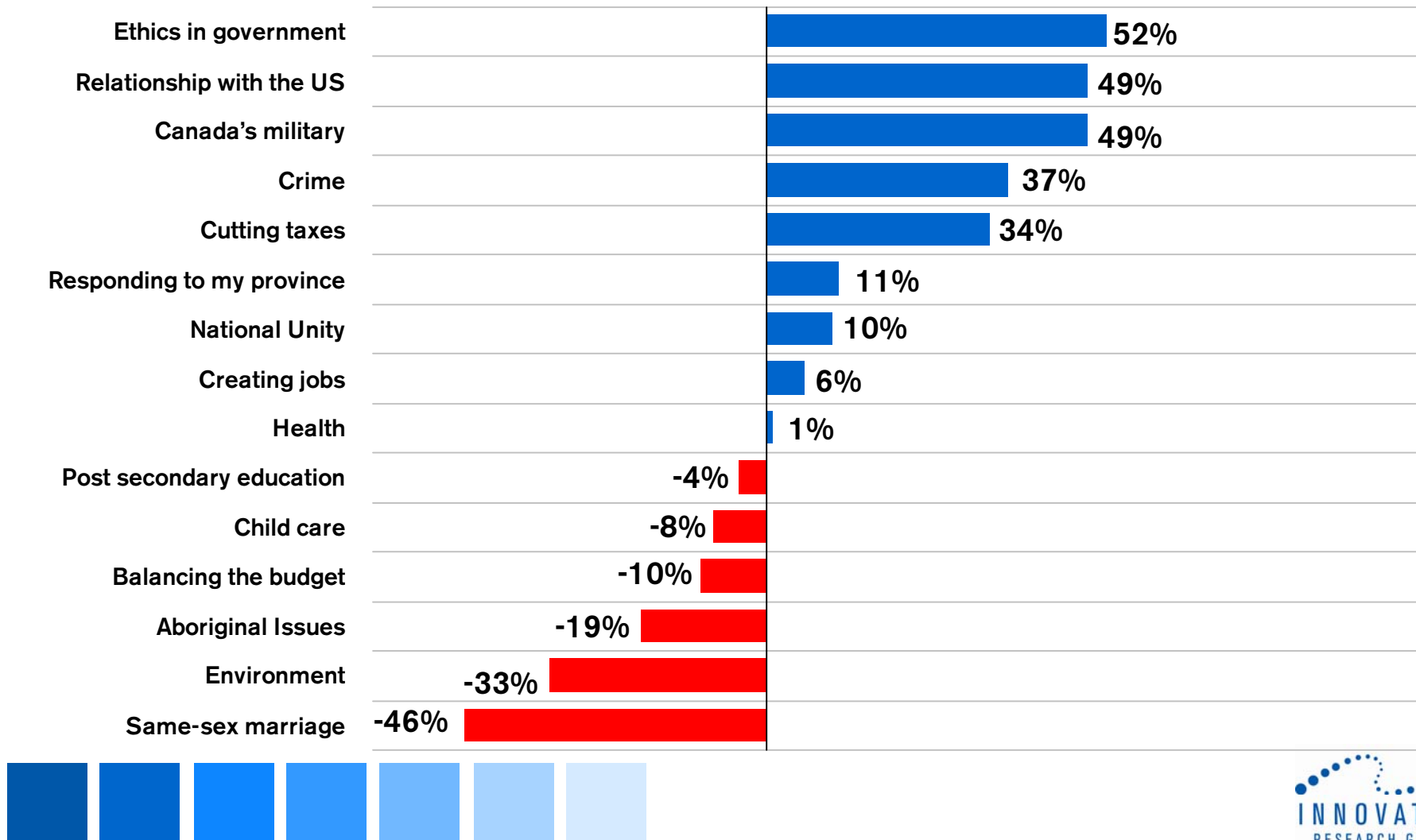
New gov't expected to be better on ethics, relations with US and the military

Do you expect the new Conservative government to do a better or worse job than the previous Liberal government in...?



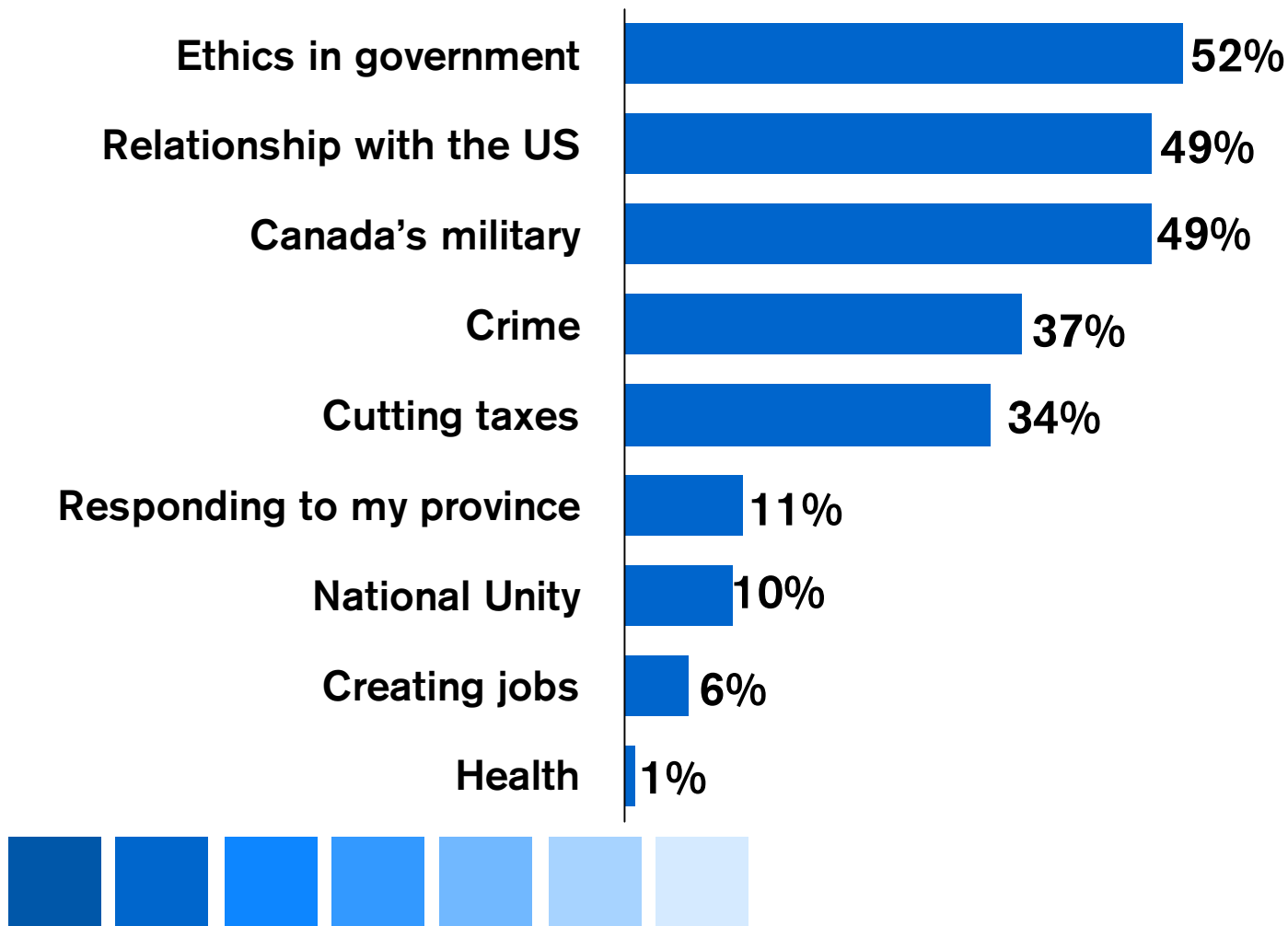
Net Expectations

Do you expect the new Conservative government to do a better or worse job than the previous Liberal government in...?



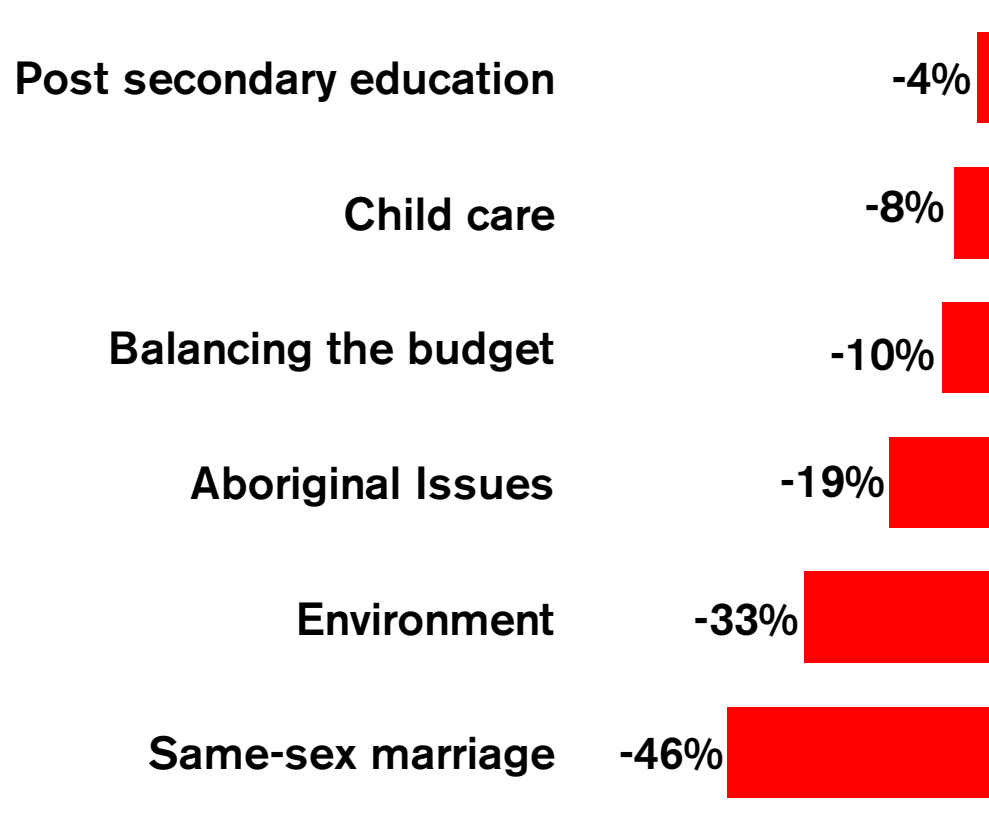
Net Better Expectations

Do you expect the new Conservative government to do a better or worse job than the previous Liberal government in...?



Net Worse Expectations

Do you expect the new Conservative government to do a better or worse job than the previous Liberal government in...?

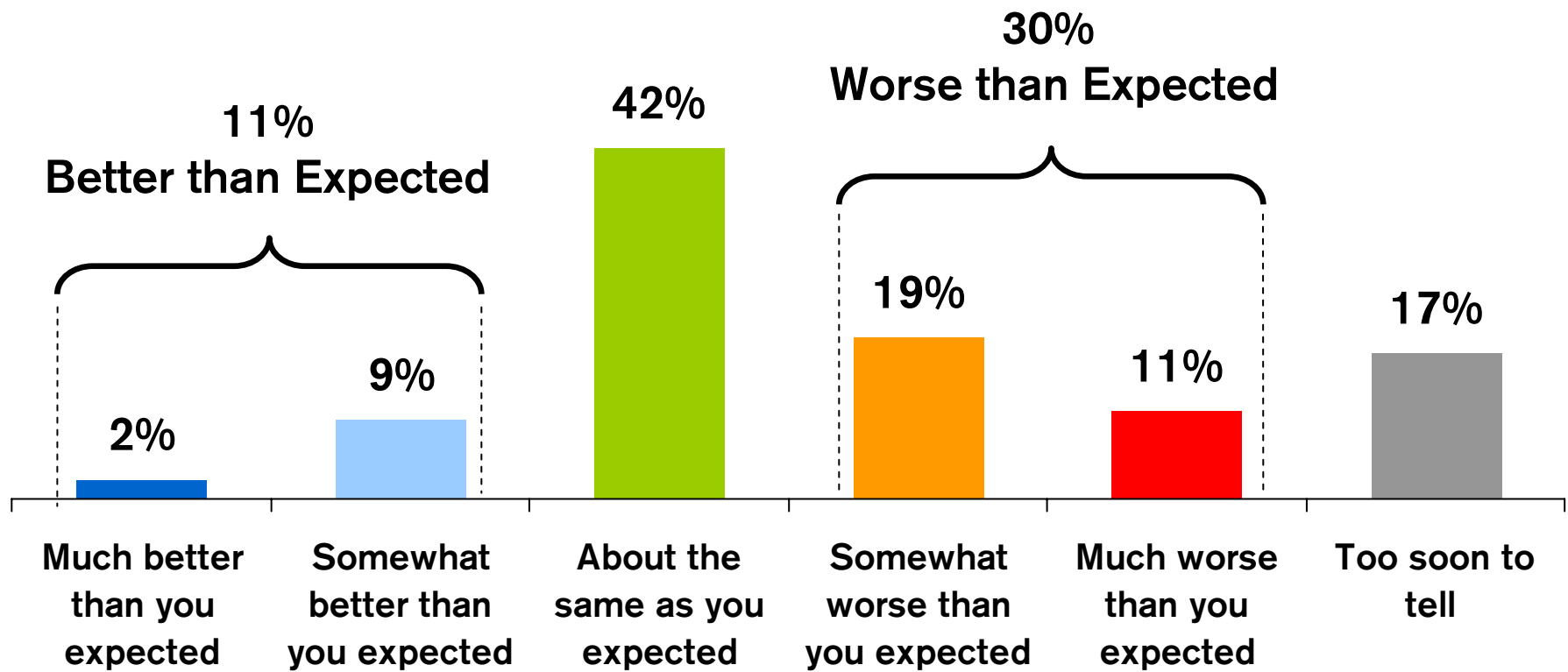


But what about the first week? ▶▶



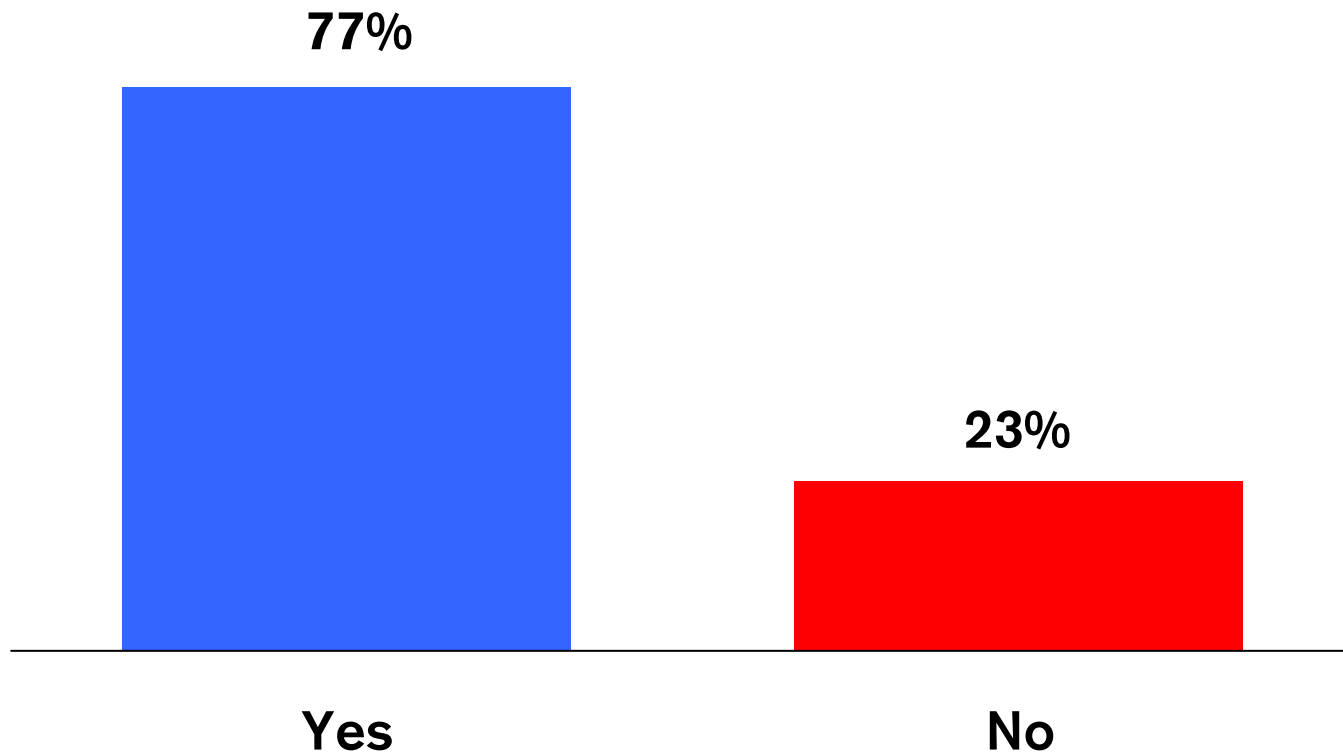
3 in 10 say government has performed worse than expected ¹⁸

Considering the performance of the FEDERAL government since it was elected last month, would you say it has performed...?



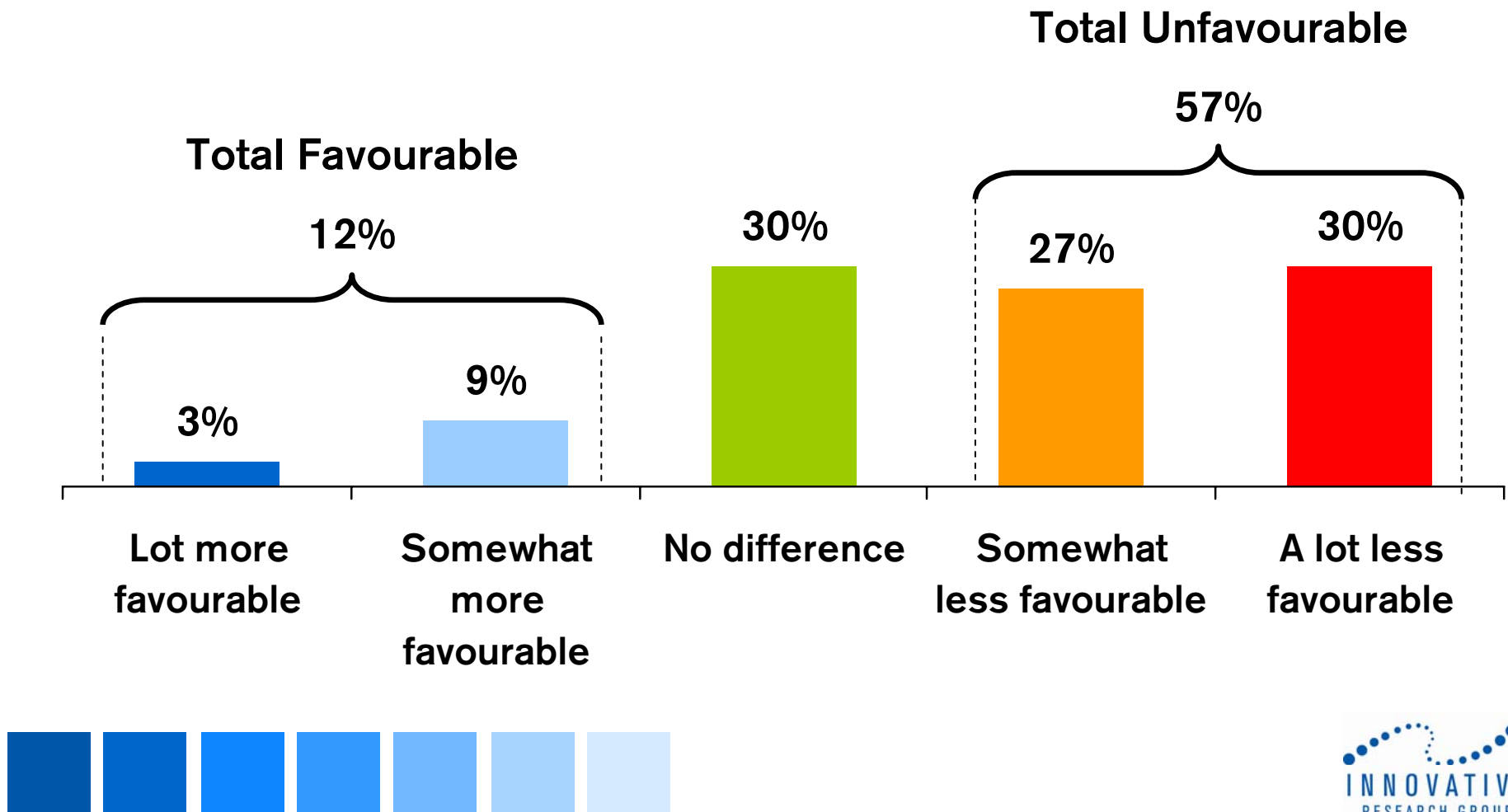
Almost 4 in 5 had heard about the appointment¹⁹ of the new federal Cabinet Ministers

Have you read, seen or heard anything recently about the new federal Cabinet Ministers appointed by Prime Minister Stephen Harper?



Majority left feeling unfavourable after hearing²⁰ about Cabinet appointments

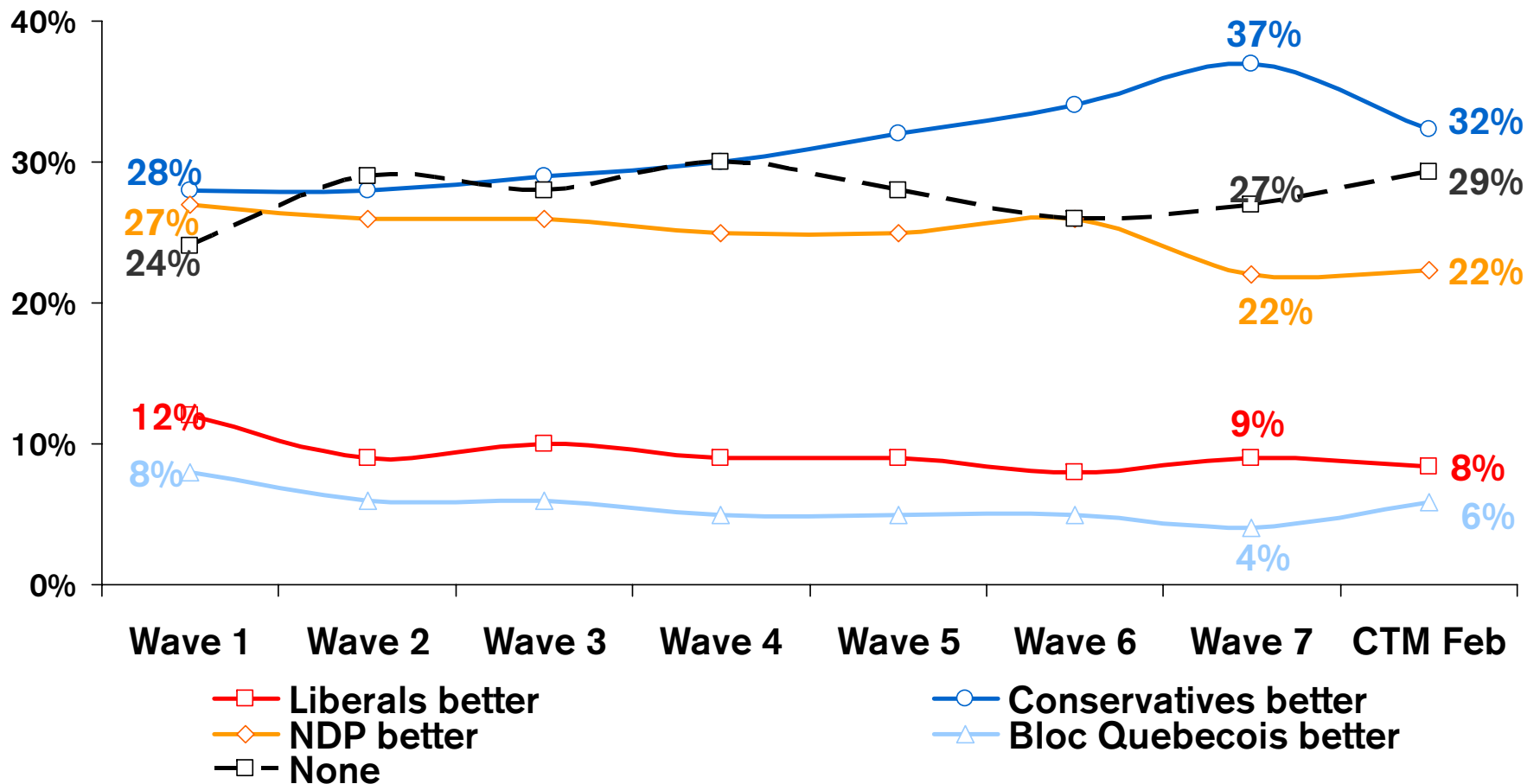
Did what you read, saw or heard about the new federal Cabinet Ministers leave you feeling more or less favourable towards the new Conservative federal government?



Conservatives still seen as better on ethics in government – but have dropped 5 points 21

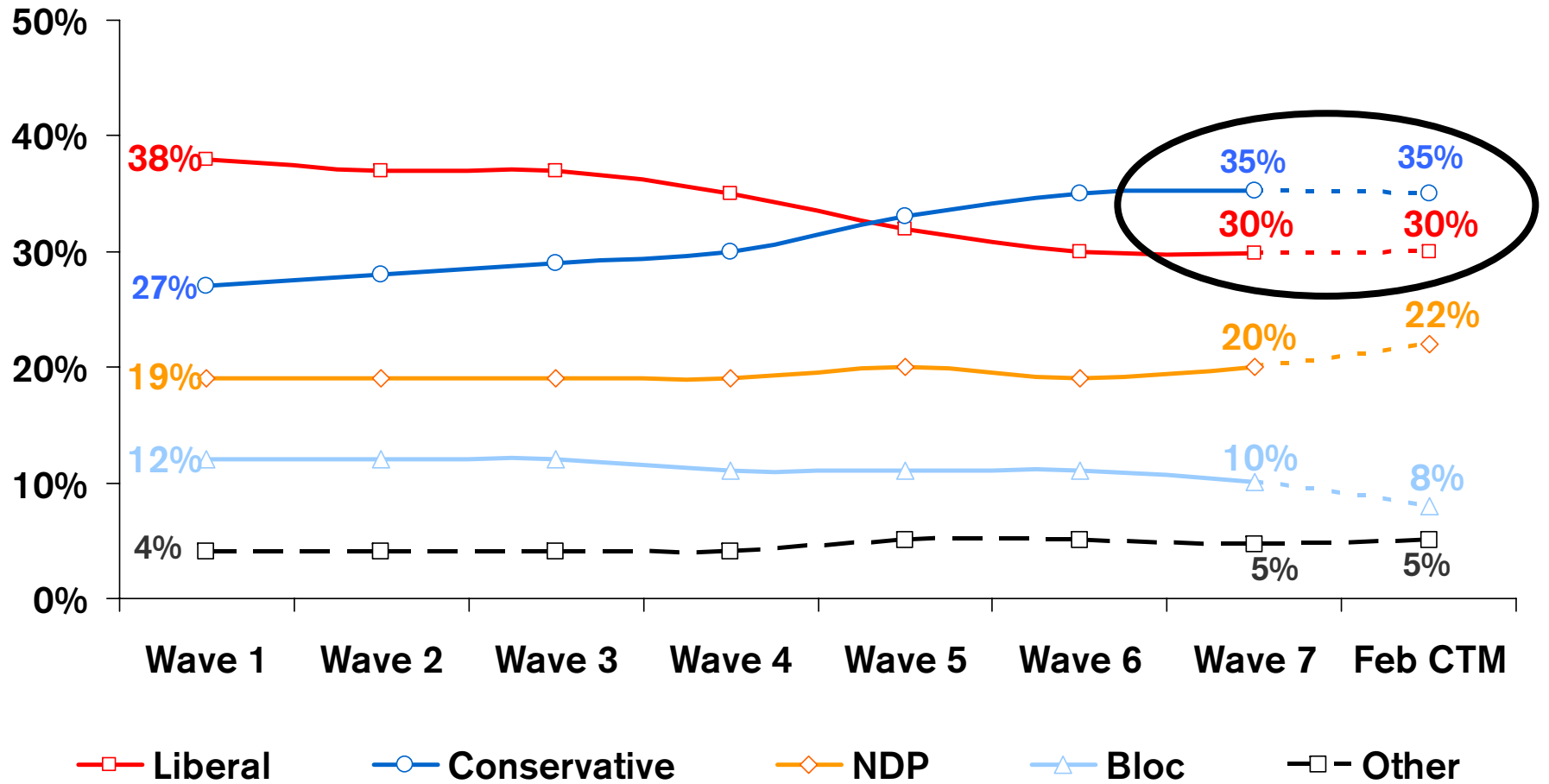
Which FEDERAL party you think would do a much better job or a somewhat better job of dealing with ...

... *Ethics in government*



Decided Vote

Decided Vote ...

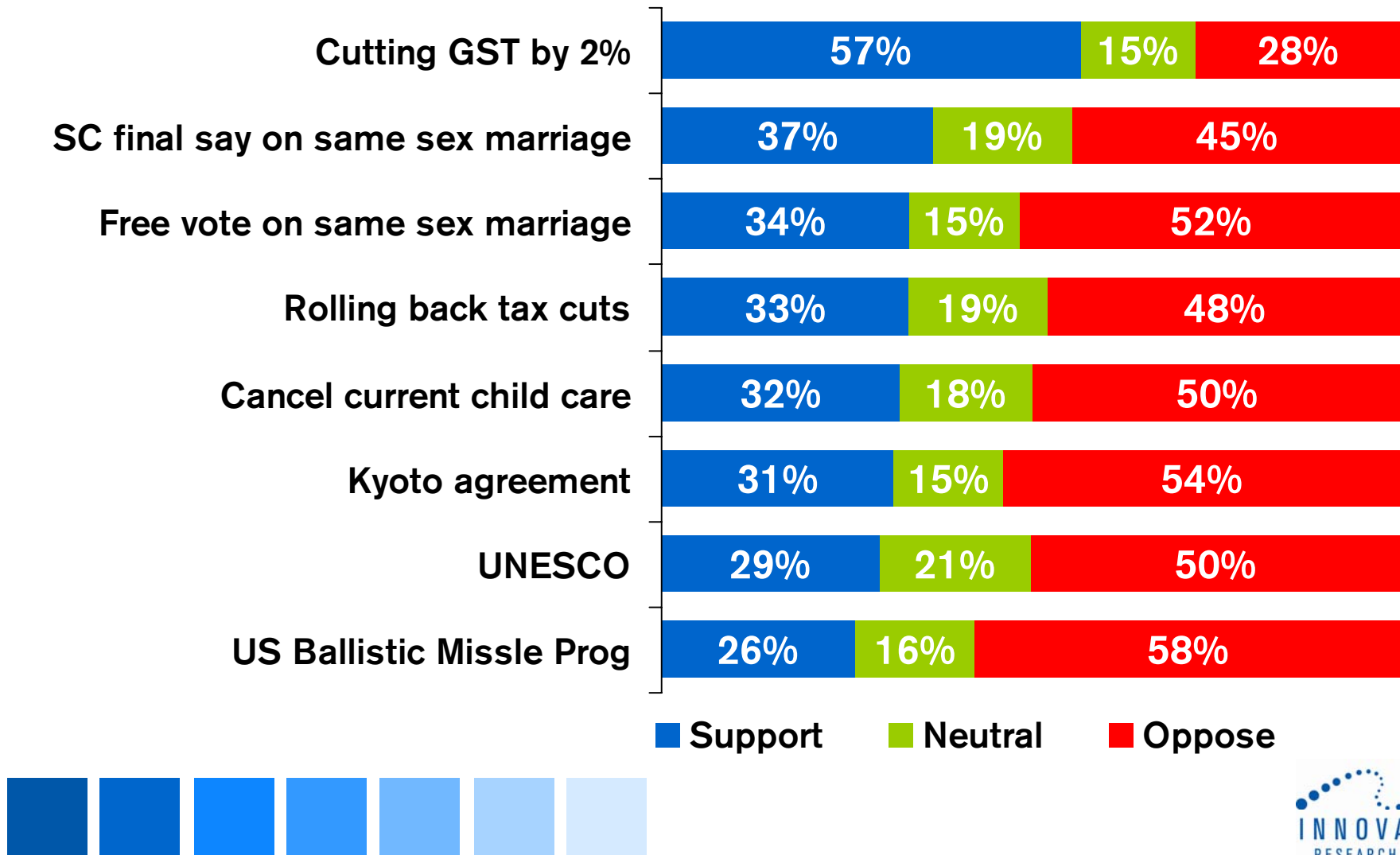


Key Issues for the New Government ▶▶



Cutting GST has highest support

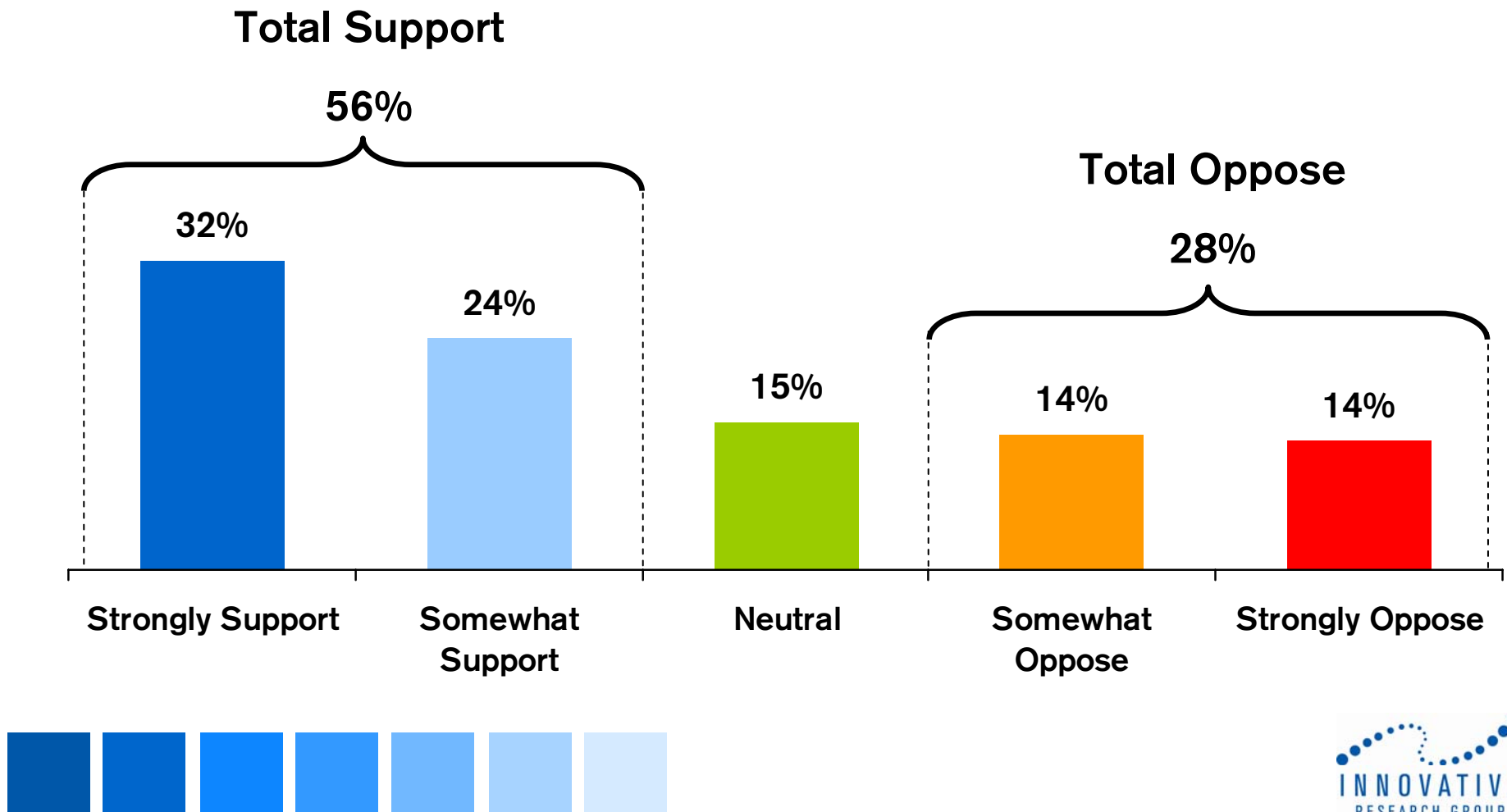
Do you support or oppose each of these policies....



Over half support cutting GST

Do you support or oppose ...

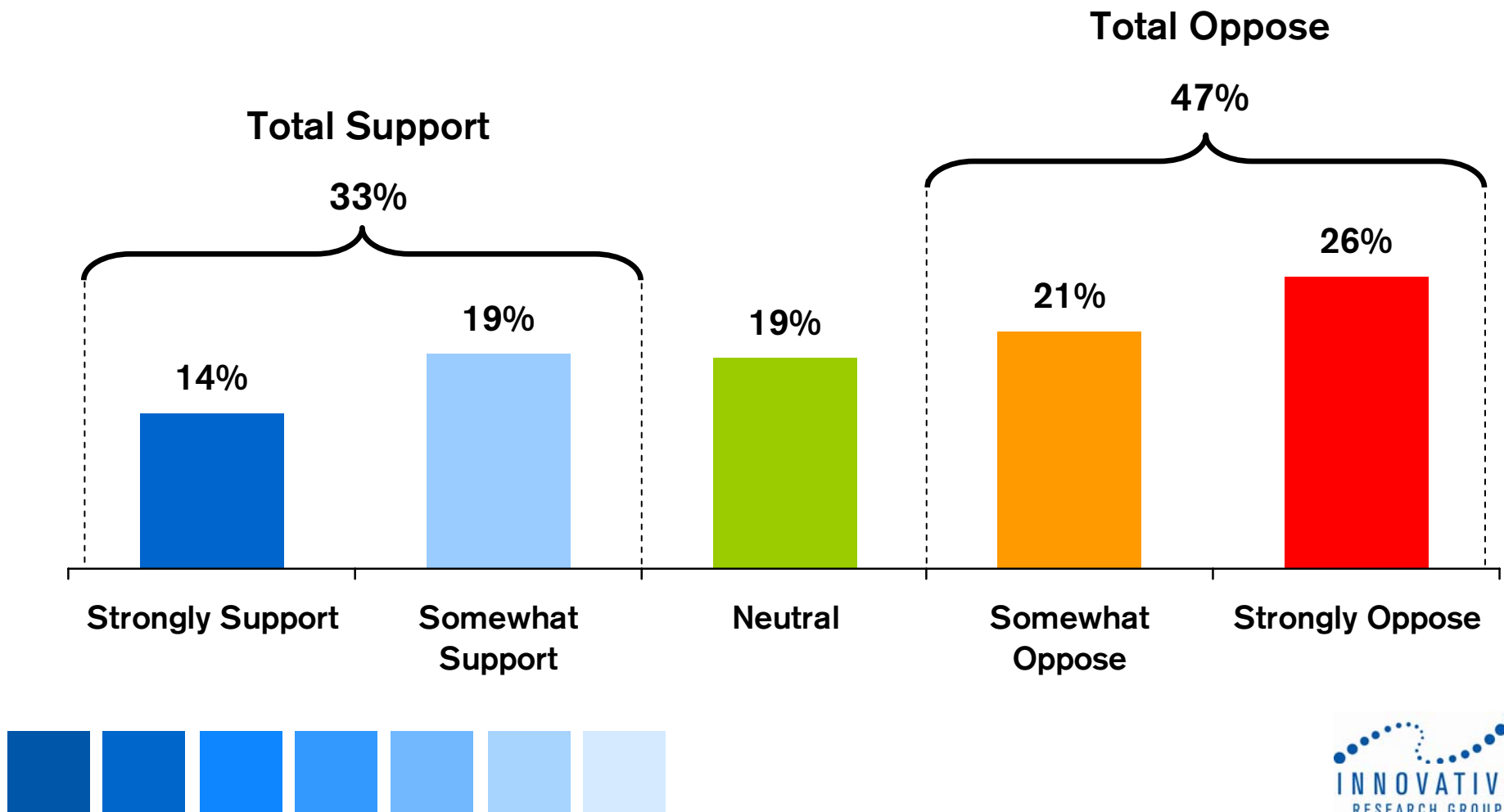
... Cutting the GST by 2%



Almost half oppose rolling back Liberal tax cuts

Do you support or oppose ...

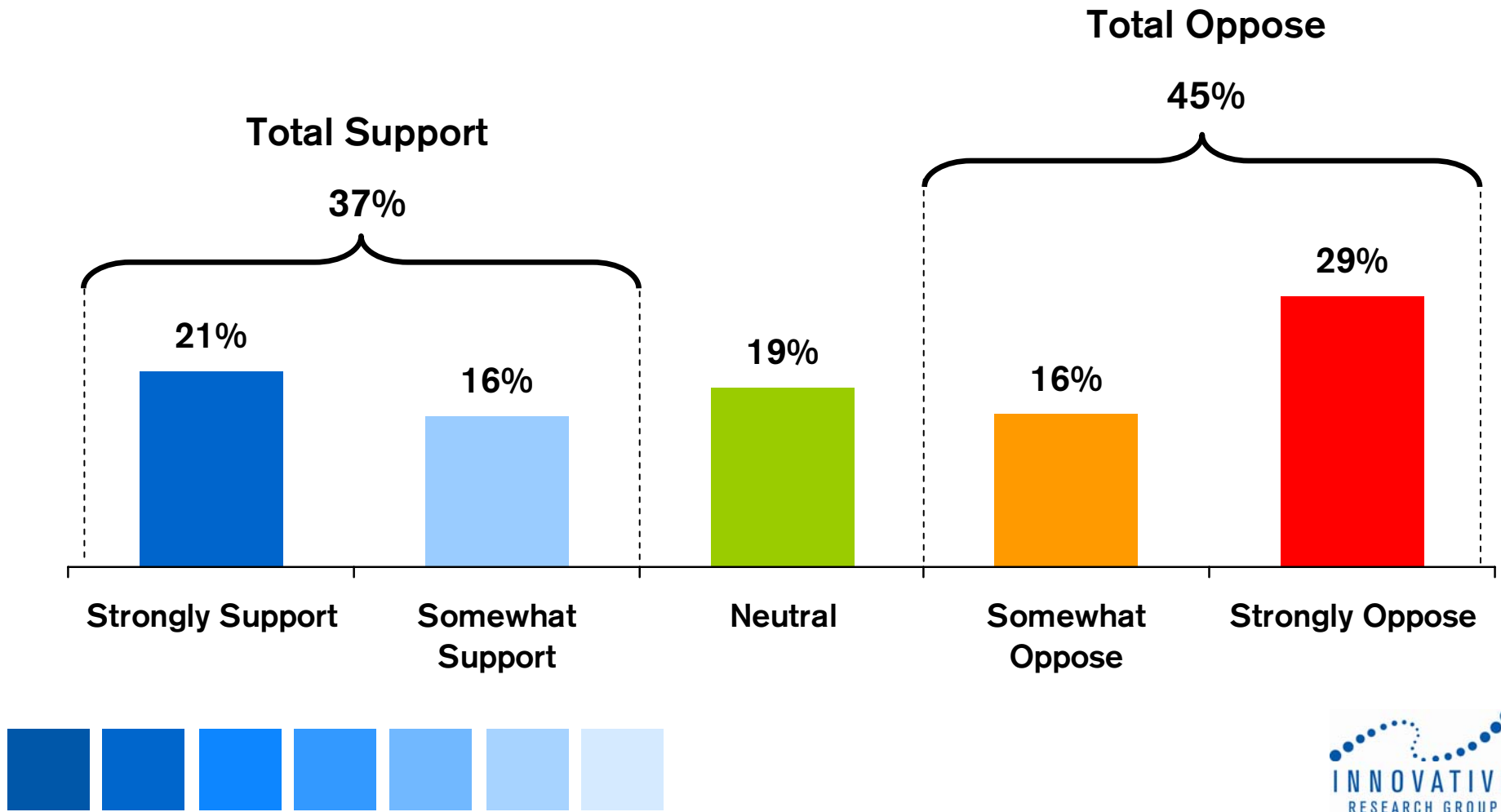
... Rolling back the tax cuts in the last Liberal budget and replacing them with new tax cuts like the 2% reduction in the GST.



Not even 2 in 5 support giving the Supreme Court final say over same sex marriage

Do you support or oppose ...

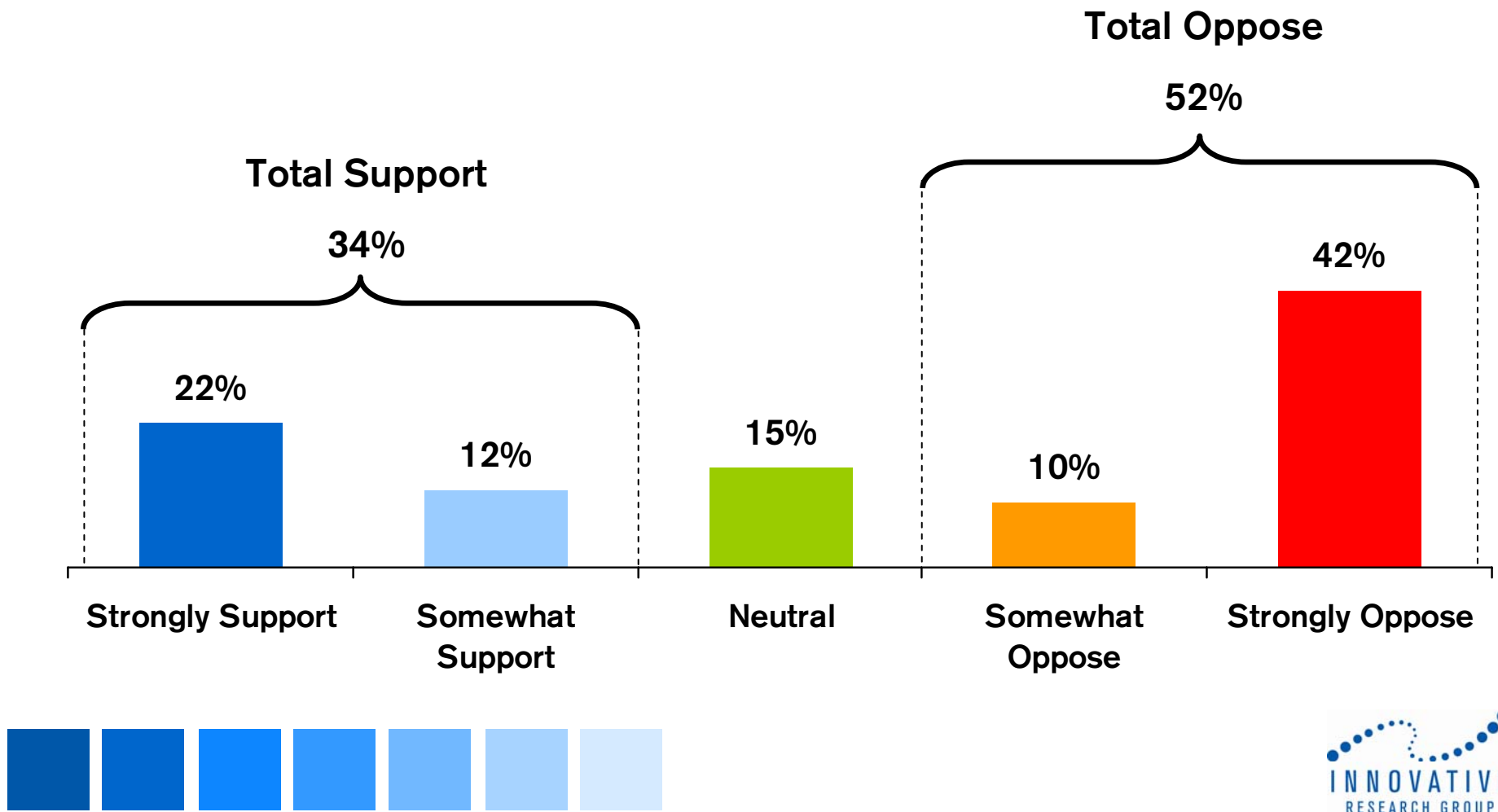
... Giving the Supreme Court the final say over Parliament on the same sex marriage issue.



A majority oppose holding a free vote on same sex marriage

Do you support or oppose ...

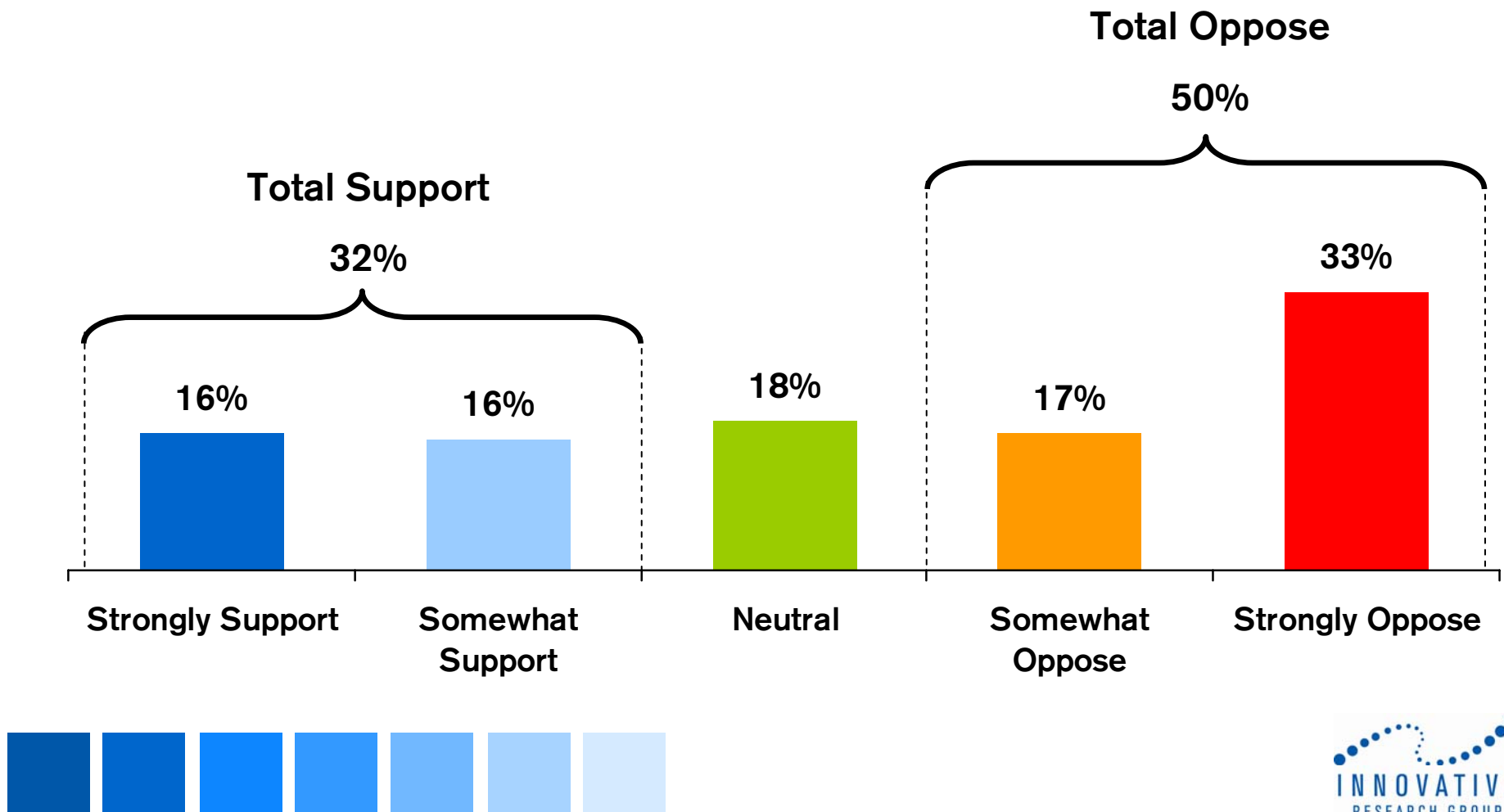
... Holding a free vote on the same sex marriage issue.



A majority oppose canceling the current child care deal ²⁹ care deal

Do you support or oppose ...

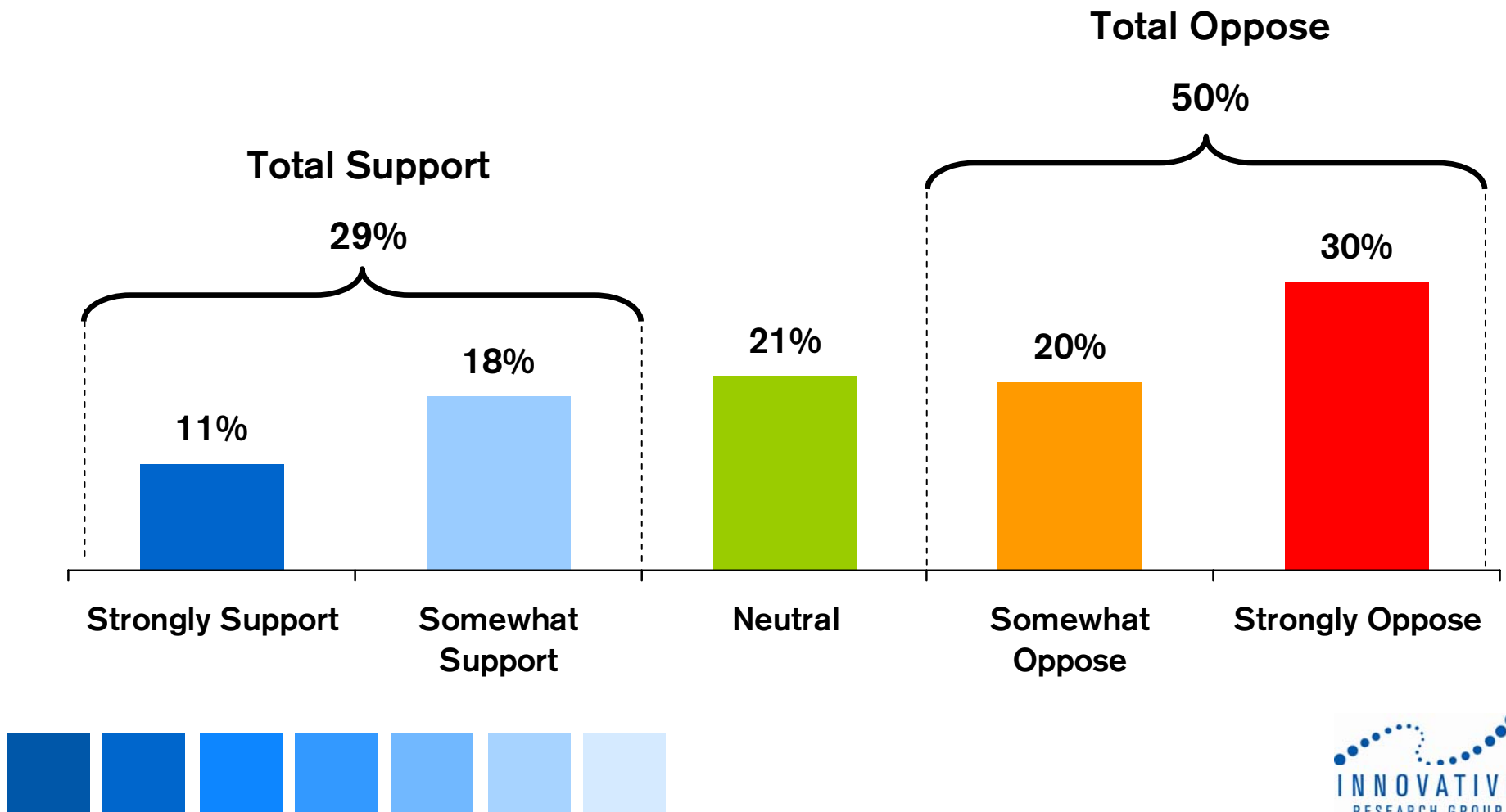
... Cancel the current child care deal with the provinces and replace it with a direct \$1,200 per child payment to families.



Half oppose Quebec playing a larger role

Do you support or oppose ...

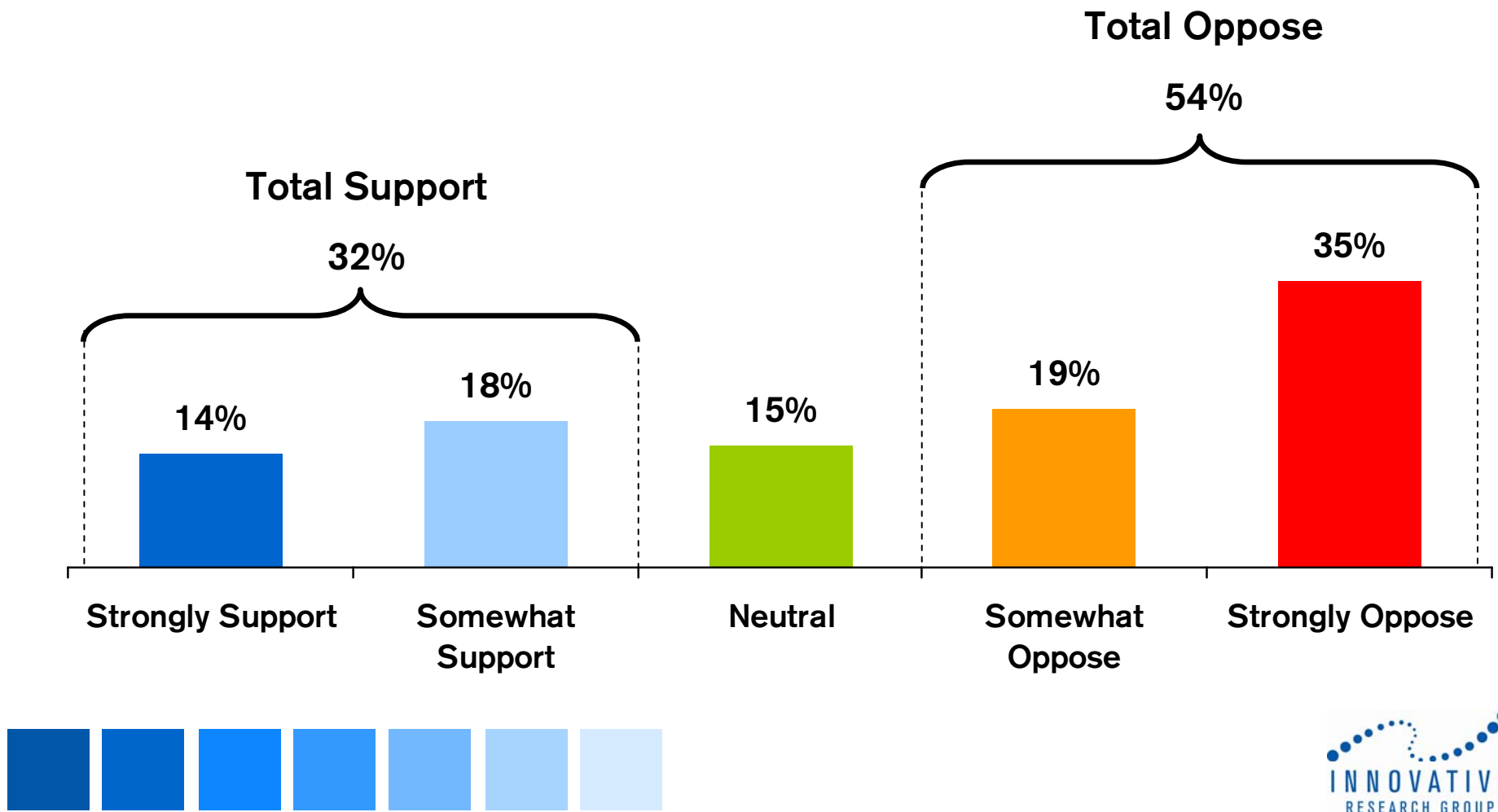
... Allowing Quebec to play a role in international institutions, such as UNESCO.



A majority oppose withdrawing Canada's support for Kyoto

Do you support or oppose ...

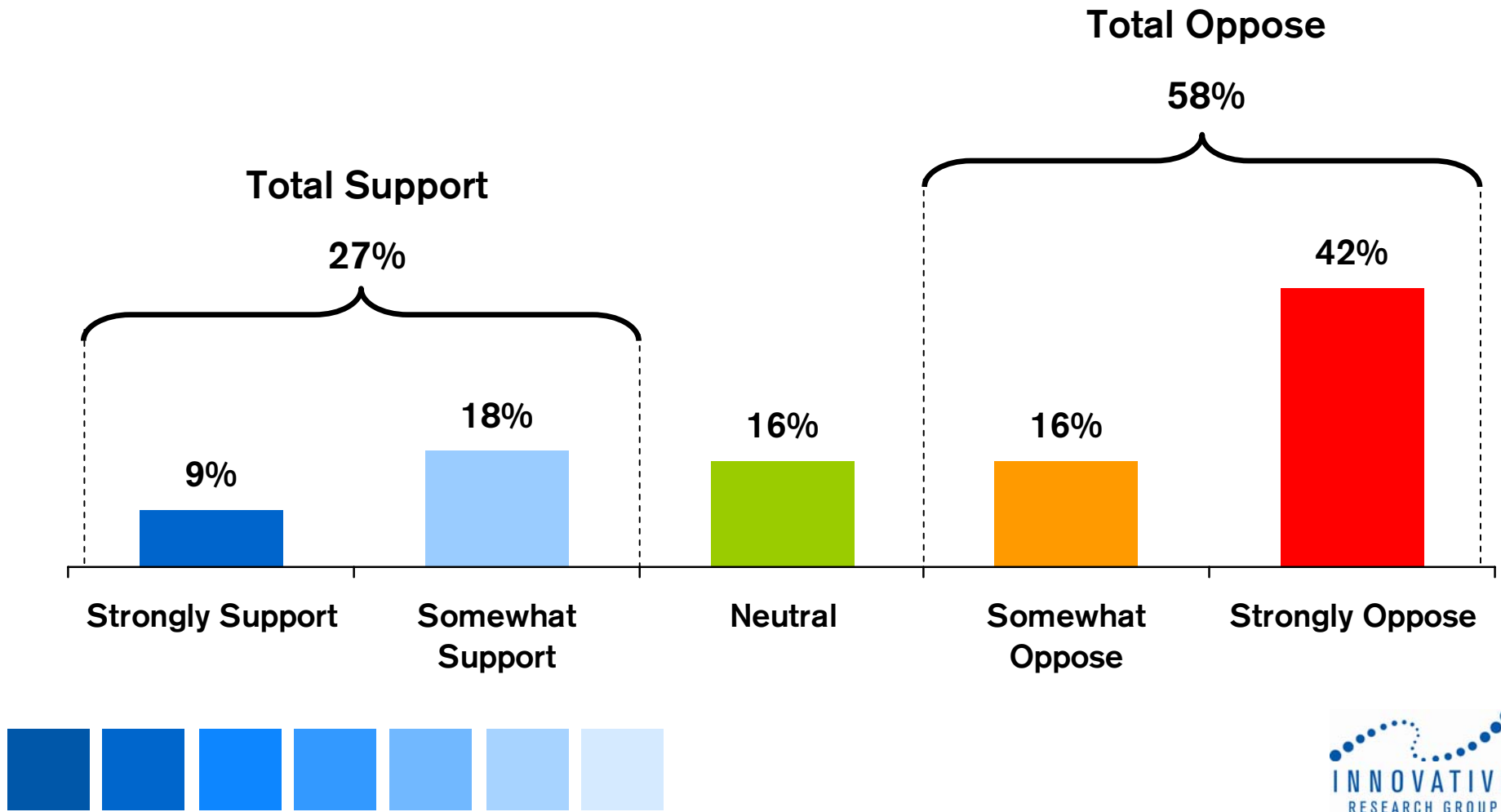
... Withdrawing Canada's support for the Kyoto agreement and introduce a Clean Air act to legislate reduction of polluting gases.



Almost 3 in 5 oppose participating in the Missile Defence program

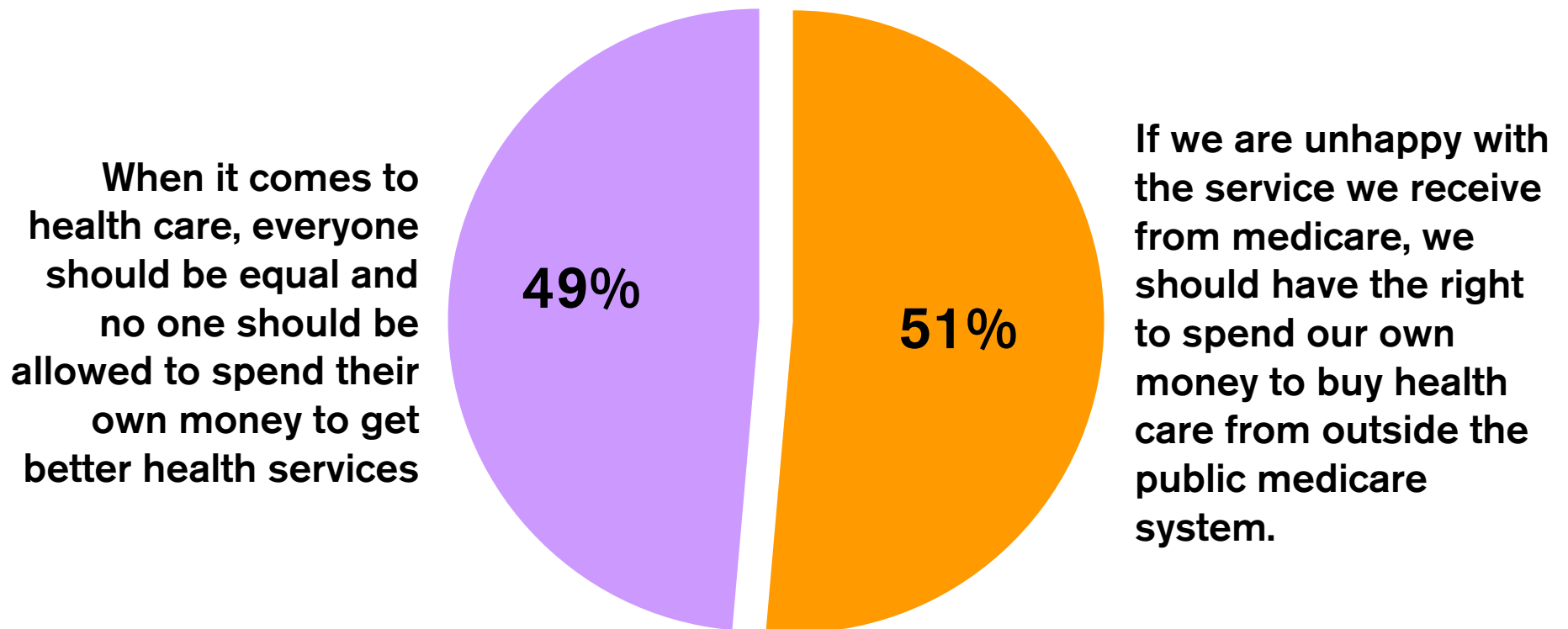
Do you support or oppose ...

... Participating in the US Ballistic Missile Defence program.



Canadians split on using personal money to buy health services

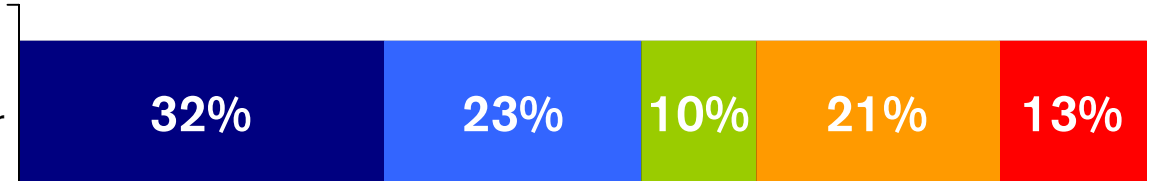
Which view is closest to your own?



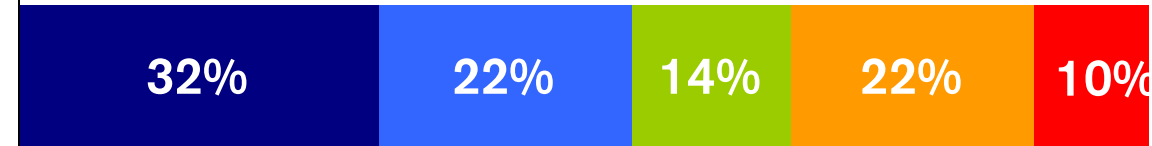
Canadians conflict on private role in health care

Do you agree or disagree with the following...?

It would be wrong to allow a separate, privately funded health care system in Canada because it would allow a two-tier health care system where the rich get better care than the rest.



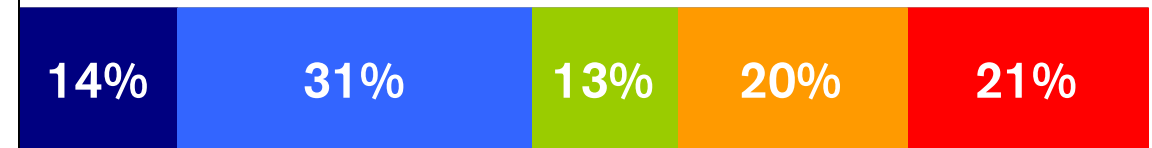
It is wrong to allow companies to make a profit providing publicly funded health care services.



I don't care whether I go to a non-profit or a for-profit hospital, so long as the government pays the bill.



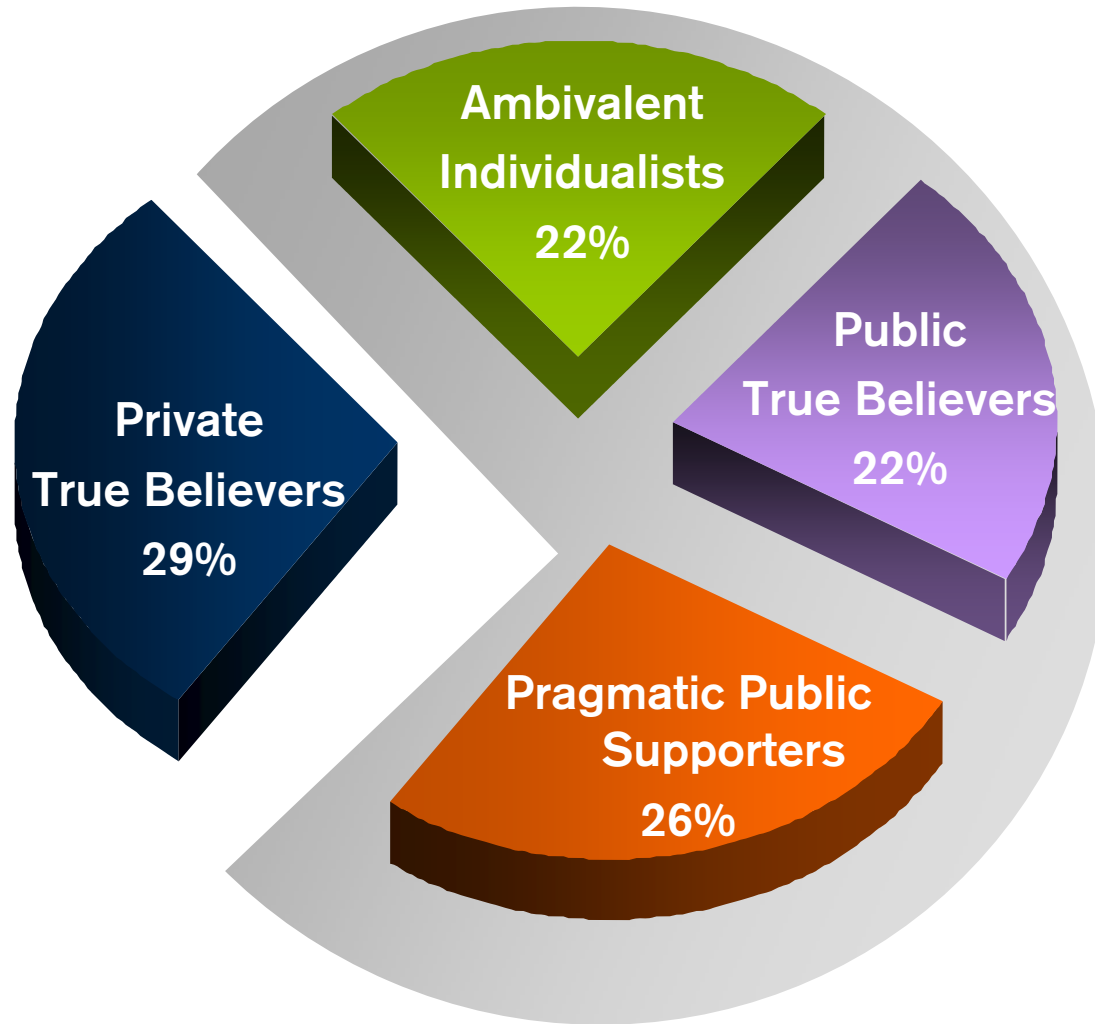
A separate, privately funded health care system would be a good way to take pressure off our publicly funded Medicare system.



■ Strongly agree ■ Somewhat agree
■ Neither ■ Somewhat disagree
■ Strongly disagree



Canadians more open to talk about private health care



Clusters defined by vote

	Public True Believers	Pragmatic Public Supporters	Ambivalent Individualists	Private True Believers
Conservative Party	8%	19%	31%	61%
Liberal Party	35%	37%	28%	21%
NDP	40%	24%	22%	8%
Bloc Quebecois	10%	13%	12%	5%
Green Party	5%	7%	7%	5%



Note: Column percentages

Count seats, not votes



Ontarians least open to spending own money to buy health care outside of public system

Which view is closest to your own?

	BC	AB	MB/SK	ON	QC	Atlantic
When it comes to health care, everyone should be equal and no one should be allowed to spend their own money to get better health services	44%	46%	44%	55%	45%	49%
If we are unhappy with the service we receive from medicare, we should have the right to spend our own money to buy health care from outside the public medicare system.	56%	53%	56%	46%	55%	51%



Ontario key stumbling block for private sector ³⁹ advocates AND Conservative majority

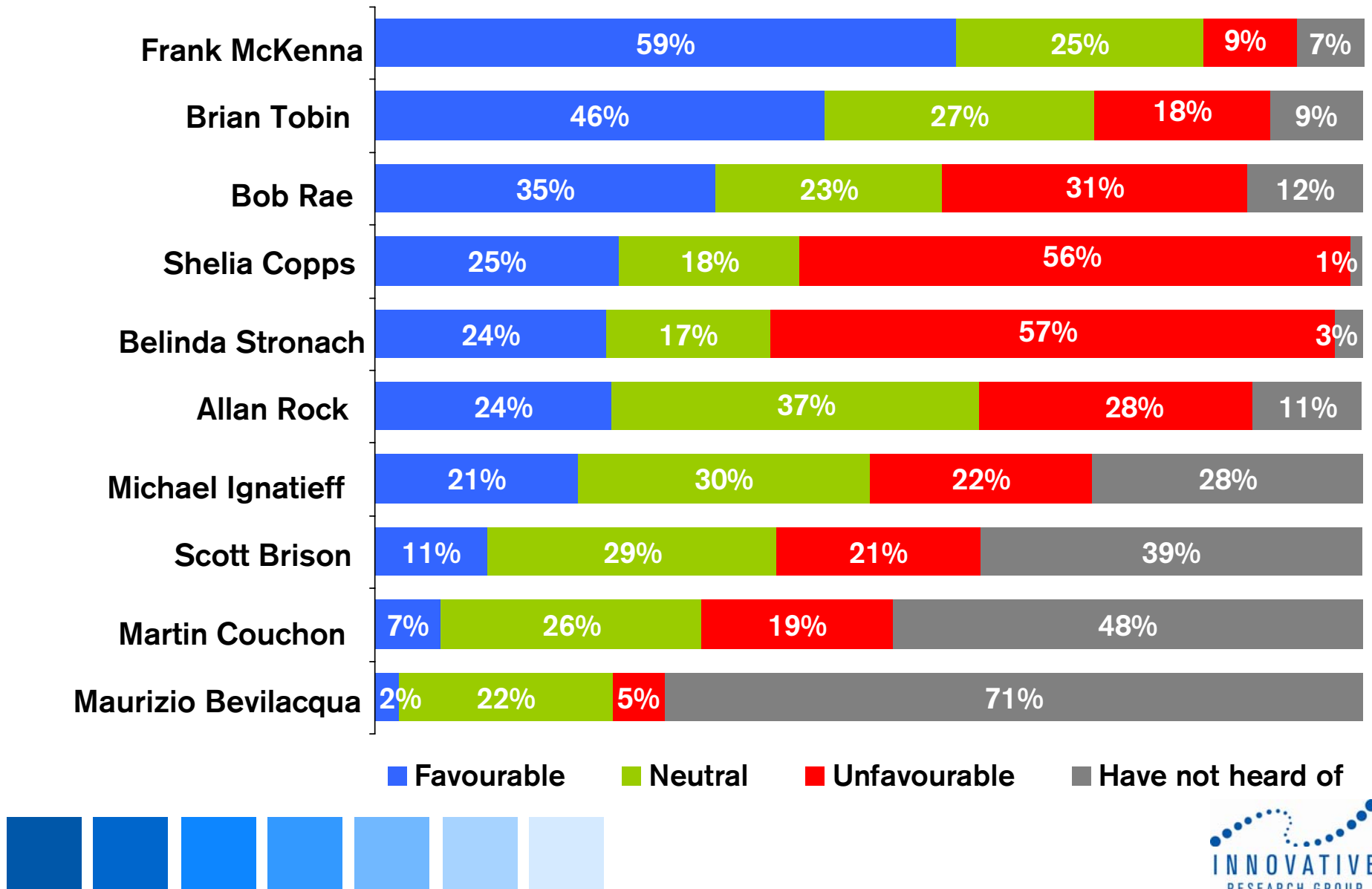
	BC	AB	MB/SK	ON	QC	Atlantic
Public True Believers	19%	25%	20%	26%	19%	23%
Pragmatic Public Supporters	25%	22%	24%	29%	26%	26%
Ambivalent Individualists	22%	18%	17%	18%	28%	31%
Private True Believers	34%	35%	39%	27%	27%	21%



And how about those Liberals? ▶▶



Impression of Federal Leadership Candidates



Federal leadership candidates by Grit universe – *Not running*

(Net Favourable)	Consistent Grit	New Grit	Former Grit	Grit as 2 nd Choice	Other
<i>Not Running</i>					
Frank McKenna	+69	+59	+56	+58	+34
Brian Tobin	+44	+35	+33	+35	+16
Allan Rock	+12	+6	+5	+7	-18



Federal leadership candidates by Grit universe – Possible contenders

(Net Favourable)	Consistent Grit	New Grit	Former Grit	Grit as 2 nd Choice	Other
<i>Possible Contenders</i>					
Maurizio Bevilacqua	-1	-1	-2	-2	-4
Michael Ignatieff	+12	+10	+4	+4	-13
Scott Brison	+8	+2	-4	-4	-22
Bob Rae	+9	+6	+2	+20	-3
Belinda Stronach	+12	-9	-27	-31	-63
Martin Cauchon	-1	0	-4	-5	-12
Shelia Copps	-36	-23	-36	-24	-30



The Big Picture

- The Conservatives are at the top of their game with a firm grasp of about 85% of their vote in their universe. However they still face a challenge in gaining new ground as 80% of the voters outside the Conservative universe see them as too extreme.
- The Liberals are at the bottom of their game only holding 60% of their vote which they need to retain and grow
- After their first two weeks in office the Conservatives are experiencing significant negative momentum but so far it has not made a significant impact on their vote.
- The Tory mandate is based primarily on a desire for more ethical government, which took a hit with the appointment of the new Cabinet.
- However the Tories have a number of strong issues to which they turn to and “switch the channel”
- In terms of the Liberal leadership, there is a struggle as the most popular candidates have already declined to run. However the Liberal stance on a number of key issues such as missile defence and same sex marriage could provide a popular ready-made platform if they succeed in attracting a marketable leader.
- At this point there are opportunities for both Canada’s main choices for government. The question is which party will capitalize off of their political opportunities.



Thank you

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