

The Search for Seats:

ONTARIO'S POLITICAL SCENE - FALL 2013

Research Report

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Ontario's Political Scene: Fall 2013

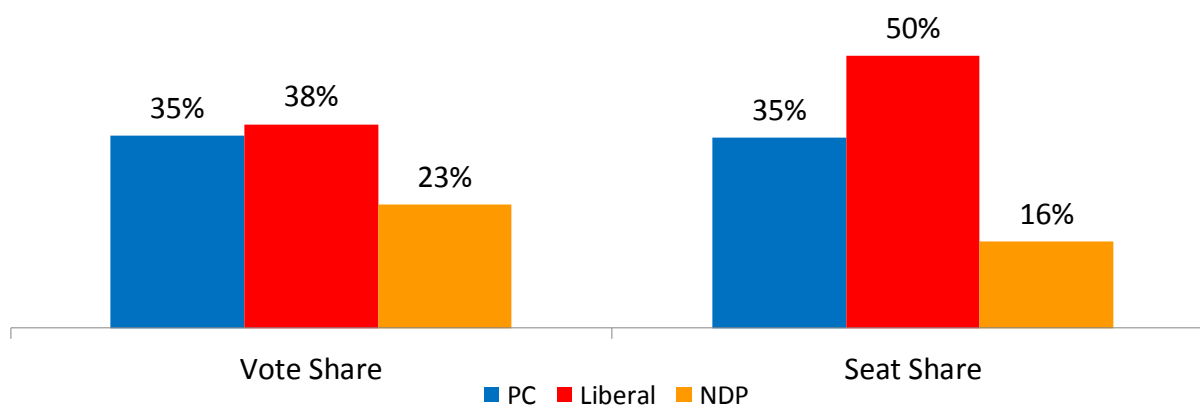
Context

Following an active political summer, there is a lot of new information for Ontario political observers to consider. Not only do we have new polling results where voters tell us what they would do in theory, we have five by-election results where we can see what voters actually did in practice.

Parties count seats, not votes. This may seem counter-intuitive coming from a pollster, but the reality is what counts on election night is not whether you have more votes than the other parties across the province, but whether you can get a plurality of votes in a majority of seats. This is what pundits mean when they talk about distribution. While it doesn't happen often, it is possible to win an election with fewer voters than your main competitor.

Looking at the last election, we see that the Liberals received a much larger share of seats than their votes suggested, which demonstrates a great vote distribution. Liberal votes turn into more seats than PC or NDP votes. The Tories got about the same proportion of seats as votes while the NDP secured a much smaller share of seats than their vote share suggests they "ought" to receive.

2011 Ontario Election Vote Shares vs. Seat Shares



Looking ahead, the challenge for the opposition is to close the *margin of victory*, the difference between the percentage of votes the winning party received and the percentage the losing party received.

What is involved in closing the margin of victory? Consider this illustration. Imagine you are in a riding with 100 voters where *Party 1* gets 45 votes, *Party 2* (you) gets 35 votes and *Party 3* wins 20 votes. If you convert 5 votes from *Party 1* and nothing else changes, the result is a 40-40 tie. The margin of victory goes from 10 points to 0 because converting the winning party's voters to your party counts twice, once when they leave the winner and once again when they join your party. Moves from the winning party to another party also help. If *Party 3* converts just 1 voter from *Party 1*, you win by 40 to 39 to 21.

What if you make only marginal gains and only convert 2 voters so you have 37 votes? If *Party 3* wins over 7 voters from *Party 1*, you still win 37 to 36 to 27. This is called winning through vote splitting and Stephen Harper is a master practitioner.

Using the actual 2011 election results, the following table shows the number of seats an Ontario party can win or lose if its average margin of victory goes up or down by 10 percentage points.

Number of Seats Impacted By a 10-Point Change in Margin of Victory

Potential Gains	Party	Potential Losses
+14	PC	-12
+15	Liberal	-17
+5	NDP	-5

The Liberals need very little improvement on their 2011 vote to win a majority.

For the Tories, a 10 percentage point average improvement across all provincial ridings is not enough. They need to win seats they lost by 12 percentage points to tie down a majority government.

The NDP face a more difficult situation. They win or lose by wide margins. Closing the gap by 10 percentage points only results in 5 additional seats. Similarly, dropping 10 percentage points only results in 5 fewer seats.

What does this mean for the various parties?

The Liberal campaign can take a sniping approach. They need very few new seats so they can focus their resources on relatively few opposition targets and spend the rest holding onto their weakest incumbent seats.

The Tories need to make a big effort in 25 to 30 target ridings to cross the majority goal line. However, they don't need to do it by themselves. Votes moving from the Liberals to the NDP can also help, as long as the NDP don't overtake the Tories.

The NDP have the toughest challenge - they need to find a way to identify specific ridings where they can create massive vote shifts. However, the by-elections suggest they may have found a way to do just that.

The Summer By-Elections

By-elections are not the same as general elections. By-elections allow voters to send a message to government without actually changing the government. That said, unlike polls, by-elections involve real voting, not hypothetical questions. So what do the by-elections say about trends in the margin of victory?

The following tables illustrate the trend in the margin that the Liberals had over the PCs and the NDP in the 5 by-election ridings between the general election and the recent by-election.

Starting with the Tories, the 2011 results showed they faced a fairly daunting challenge in the by-elections. Only two of these seats actually fall within the PC pool of target seats in a general election, and in both cases they would have been among the last seats the PCs would expect to win. Yet in every single by-election result, the PCs closed or reversed the Liberal margin of victory by at least the level of change they need to win a majority across the province.

Liberal Margin Over (Behind) PCs

Riding	2011 Margin	2013 Margin	Change
Etobicoke Lakeshore	22%	-5%	26%
London West	16%	-17%	33%
Ottawa South	15%	4%	12%
Scarborough Guildford	20%	5%	15%
Windsor Tecumseh	22%	-8%	30%

In the case of Etobicoke Lakeshore where the NDP vote actually dropped 7 points, the improvement was entirely the PCs' own doing. In other seats, the reduction in the Liberal margin came more from NDP growth. The improvement in the Tory margin of victory or defeat against the Liberals in the by-elections was enough to give them a majority in the general election, even if it was only enough for one by-election win. The trick for the Tories is to make sure the NDP don't overtake the PCs in too many seats the way they did in London West.

The NDP faced a similarly tough challenge. Only Windsor Tecumseh fit the profile of a target seat with a 10 percentage point margin of victory for the Liberals in the general election. In the next closest, London West, the Liberals beat the NDP by 24 percentage points in the 2011 election. Yet the NDP were able to engineer two massive upsets and showed a very respectable improvement against the Liberals in Scarborough Guildford.

Liberal Margin Over (Behind) NDPs

Riding	2011 Margin	2013 Margin	Change
Etobicoke Lakeshore	36%	34%	1%
London West	24%	-26%	50%
Ottawa South	35%	28%	7%
Scarborough Guildford	30%	7%	22%
Windsor Tecumseh	10%	-49%	59%

No Need for the Liberals to Panic Yet

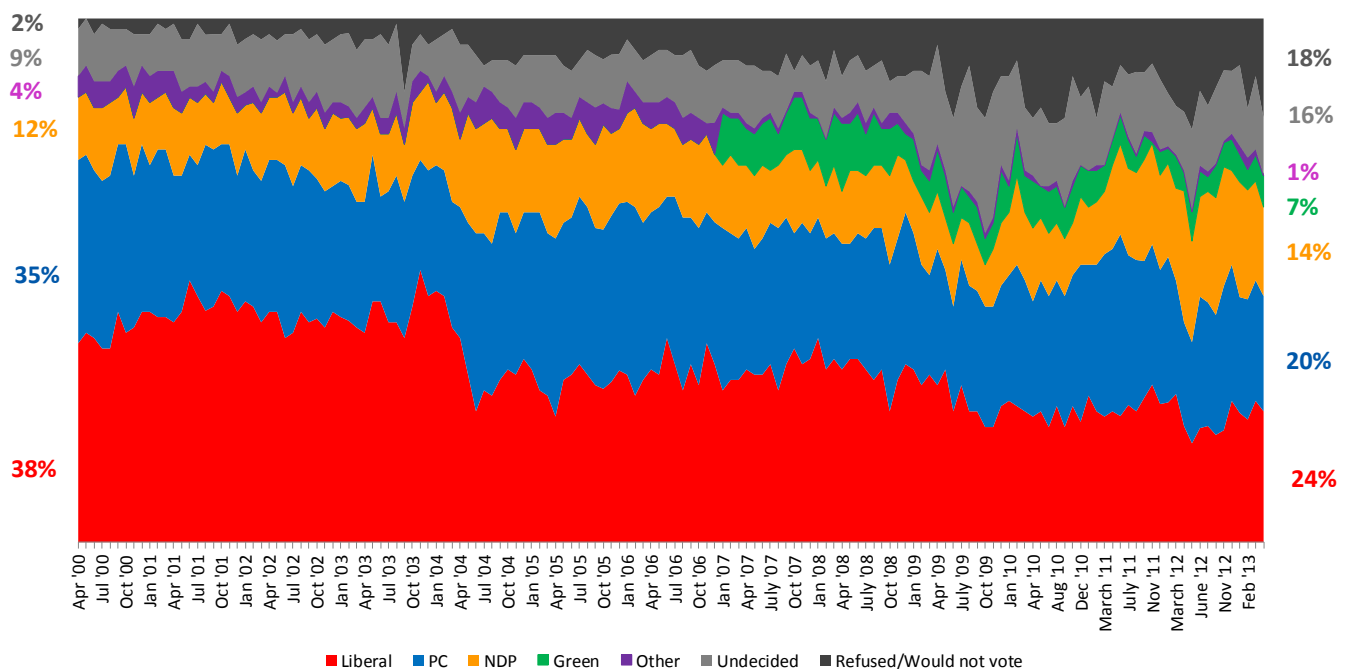
From the perspective of winning seats, the Tories and NDP can both take comfort in the by-election results. But the **Liberals can take some comfort in the polls.**

INNOVATIVE's latest **Ontario This Month** poll, conducted on land lines among 600 randomly selected Ontarians, was completed at the end of August, after the dust had settled from the by-elections. The margin of error was +/- 4.0%, 19 times out of 20. The sample is regionally stratified and weighted by age and gender to reflect the 2011 Census demographic breakdowns.

Despite the by-election results, the Wynne Liberals are actually ahead in the latest polls. Looking at the first choice and lean combined percentages among all voters – not just decided voters – there are two things that should stand out in the chart below:

Party Support among All Respondents

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]



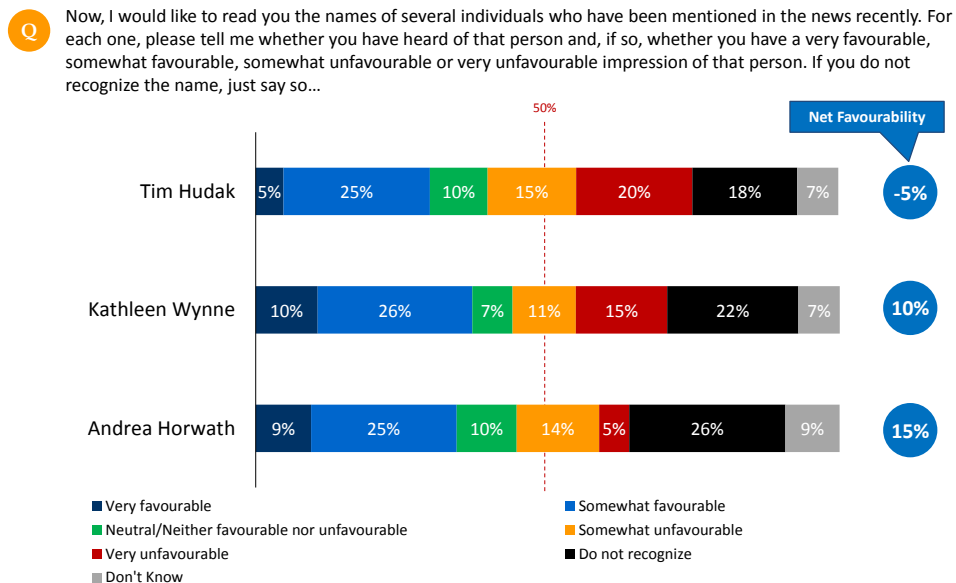
- First, the Liberals currently have a 4 point lead over the PCs who are themselves 6 points ahead of the NDP. The Liberals can take a little comfort from being ahead of the PCs but their lead is within the margin of error. This month's lead may just be random variation within the general pattern of the PCs and Liberals trading the vote back and forth.
- Second, there has been a major decline in voter allegiance to both of the two main parties. When we started our **Ontario This Month** tracking in 2000, the Tories and Liberals together usually received the support of more than 70 out of 100 voters. Today, they have the combined support of just 44 out of 100 - a 25 to 30 point drop in support for the major parties depending on the month.

Clearly the NDP should not be happy with their current 14 points of support, but they are by no means out of the picture. Their opportunity is to define the next election as new vs. old and mobilize the 25 or 30 people out of 100 that have fled the two main parties to become uncommitted voters. As the balance of power in a minority government, the NDP will regularly have the spotlight. However they will need to do a better job when the spotlight does shine on them than they did in the last budget.

One thing the NDP and PCs cannot count on is time for a change sentiment. While only 27% feel the Liberals deserve re-election in our last poll, time for a change is hovering just below 50%. Almost a quarter are not sure.

To put the *Deserve Re-election* number in perspective, an Angus Reid poll just days before the last election showed only 28% of Ontarians felt the Liberals deserved re-election. However, since the Liberals ended up with 38% of the vote on Election Day, it appears they rallied another 10 points of support among people who felt that while the Liberals may have their problems, they were still the party best able to run the government. This is exactly the same phenomenon that gave Christy Clark and Alison Redford their surprise wins.

Leadership Favourables



Like most polls, we show Andrea Horwath has the most positive **net image** (+15 subtracting unfavourable from favourables), followed by Wynne (+10) with Hudak trailing (-5). However, Wynne actually has higher favourables (36%) than Horwath at 34%. Perhaps more surprising is that Hudak’s favourable rating (30%) is only slightly behind the two other party leaders.

If everyone who liked Tim Hudak voted PC, the PCs would have a 6 point lead over the Liberals. Hudak’s challenge is that he has more negatives (35%) than Wynne (26%) and Horwath (19%). Whatever the Tories’ problems, Hudak’s negatives can’t be the whole, or even most, of the story.

Wynne’s challenge is that her negative impression has doubled from an initial score of 12% when she was first elected. Her opportunity is that as Premier she can use her news value to build positives among the 22% of voters who still don’t know her and the 14% who are not sure what they think about her (“Don’t know” [7%] and “Neutral” [7%]).

However, just being liked doesn't make you best choice for Premier. Wynne, the actual Premier, leads as *Best Premier* at 22% with Horwath and Hudak tied at 18%. This is a three point drop from Wynne's earlier ratings. Horwath is recovering from a drop to 13% after the Liberal leadership, but is still short of the 21% she scored last December. Hudak has been bouncing between 18% and 20% all year.

Summary

It is clearly anyone's game at this point. Each party has a clear path to victory. The Liberals' path with the bully pulpit of government is easier than the others, but no one can take victory for granted. Polling shows that even in a period of time where government is being measured against perfection, the Liberals are actually ahead of the other parties.

However, **the by-elections give hope to the opposition parties.** Those five seats were not particularly close target seats. Only one seat fits a traditional profile of a NDP target seat, and only two would have made it into a Tory target list, although just at the extreme edge. Yet the NDP engineered two breakthrough wins while the Tories secured a swing in each seat that would have delivered a majority in a general election. If the general election sees similar changes in the margins of victory as we saw in the by-elections, the government will be defeated. However, the stakes will change in the general election when voters are not sending a message but electing a government. There is still an opportunity for the Liberals to close the gap between their polling results and their by-election voting results.