Innovative Research Group, Inc.
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Ontario Politics: What Happened? What's Next?
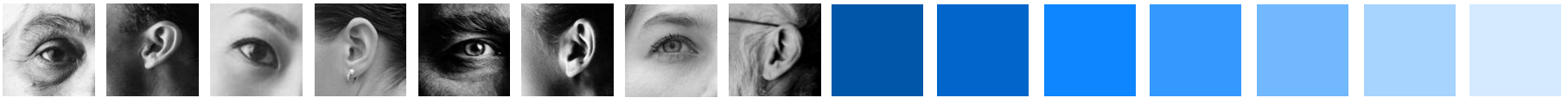
Prepared For:

PAAC
PUBLIC AFFAIRS ASSOCIATION OF CANADA

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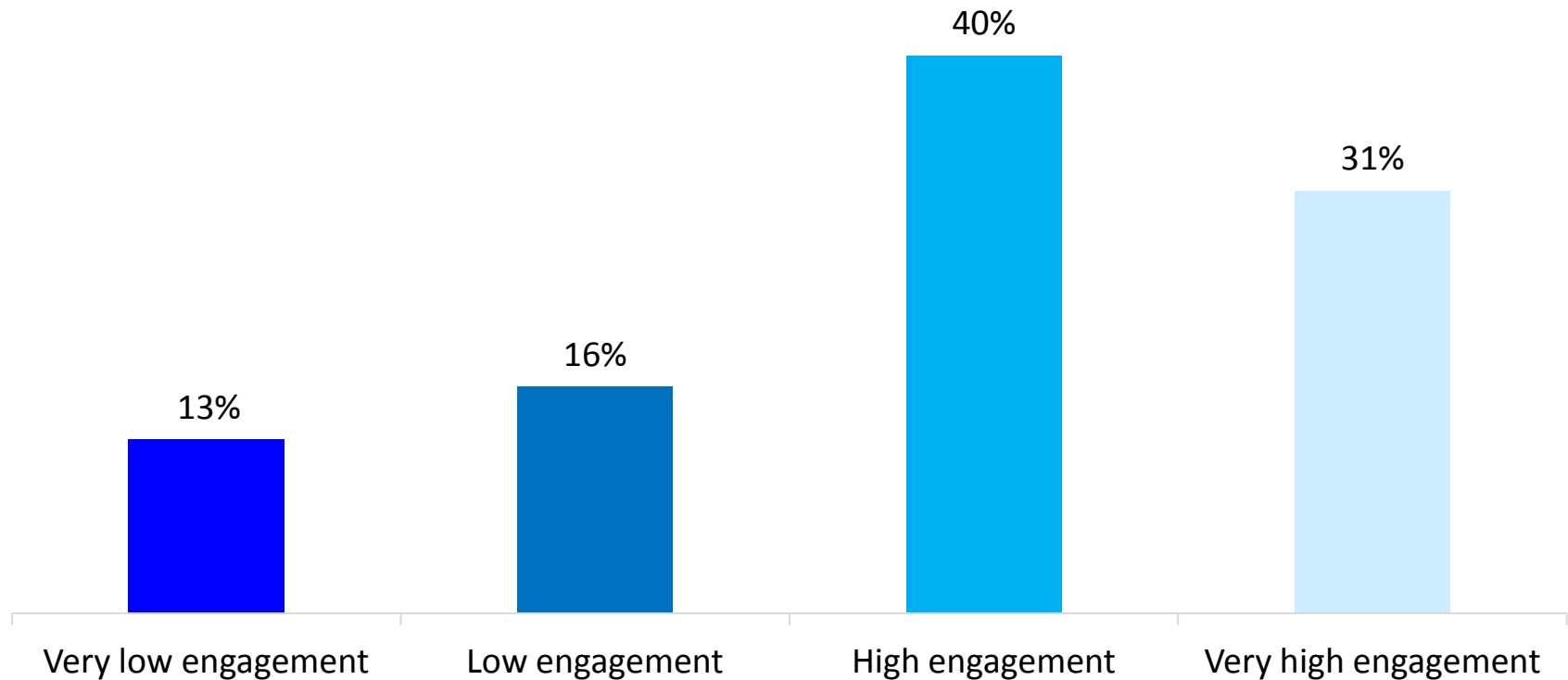# **Decided Vote Comparisons:** Telephone vs Online
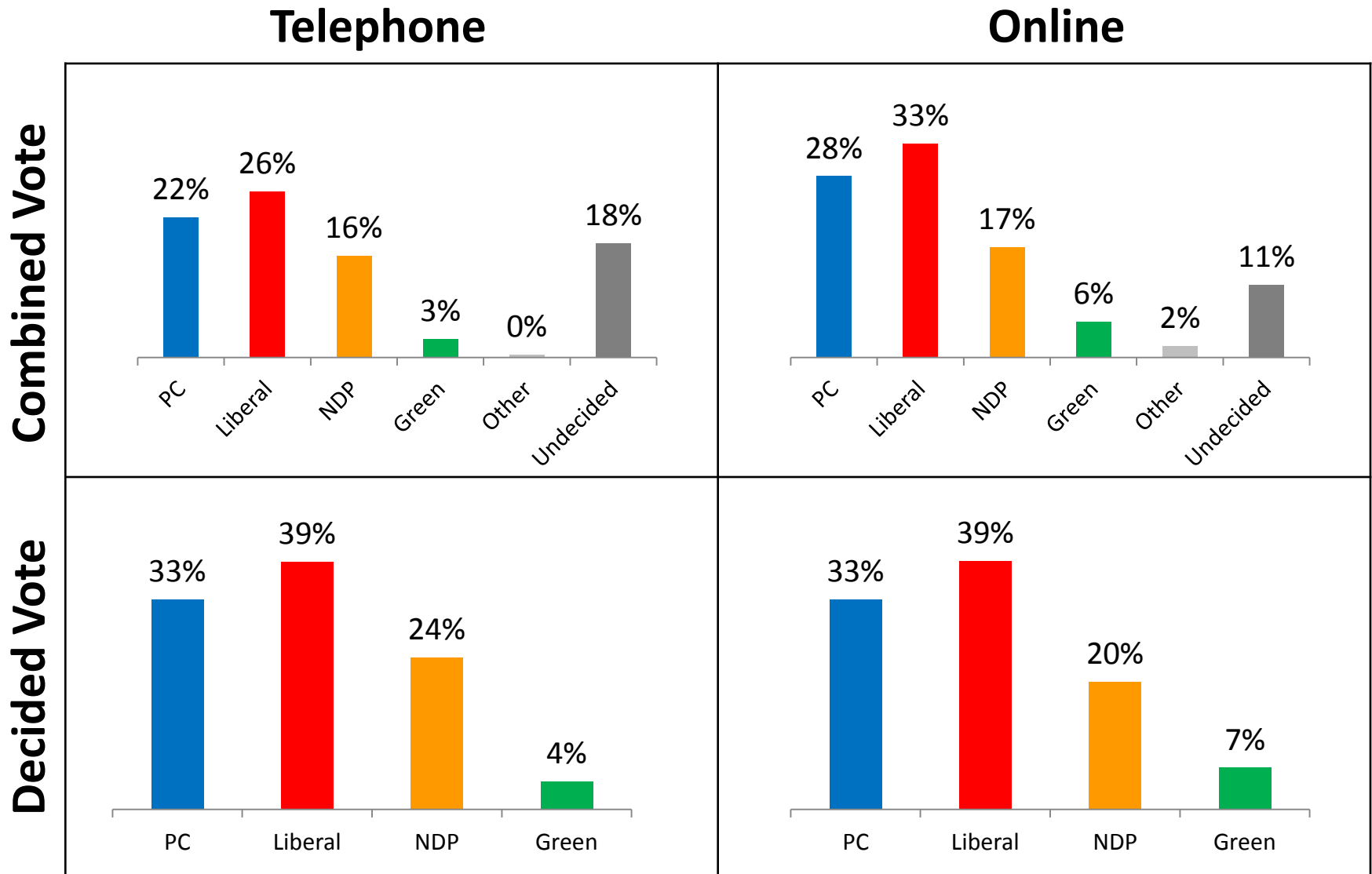
Decided Vote Data Comparison

Decided provincial vote intent is consistent across both data sources.

	RDD Telephone	Canada 20/20 Online	Difference
PC	32.8%	32.8%	0.0%
Liberal	38.7%	38.8%	-0.1%
NDP	23.7%	19.9%	3.8%
Green	4.3%	6.5%	-2.2%
Other	0.5%	2.0%	-1.5%

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Attention based engagement

Attention based engagement is measured as an index of respondents' answers to 7 questions. These questions ask whether voters have "seen, read, or heard" about each of the 3 major party leaders in the last few days, and how familiar they consider themselves with each of the 4 party leaders (including Green party leader, Mike Schreiner). This is a measure of how engaged respondents are with the facts and events of the political campaign.

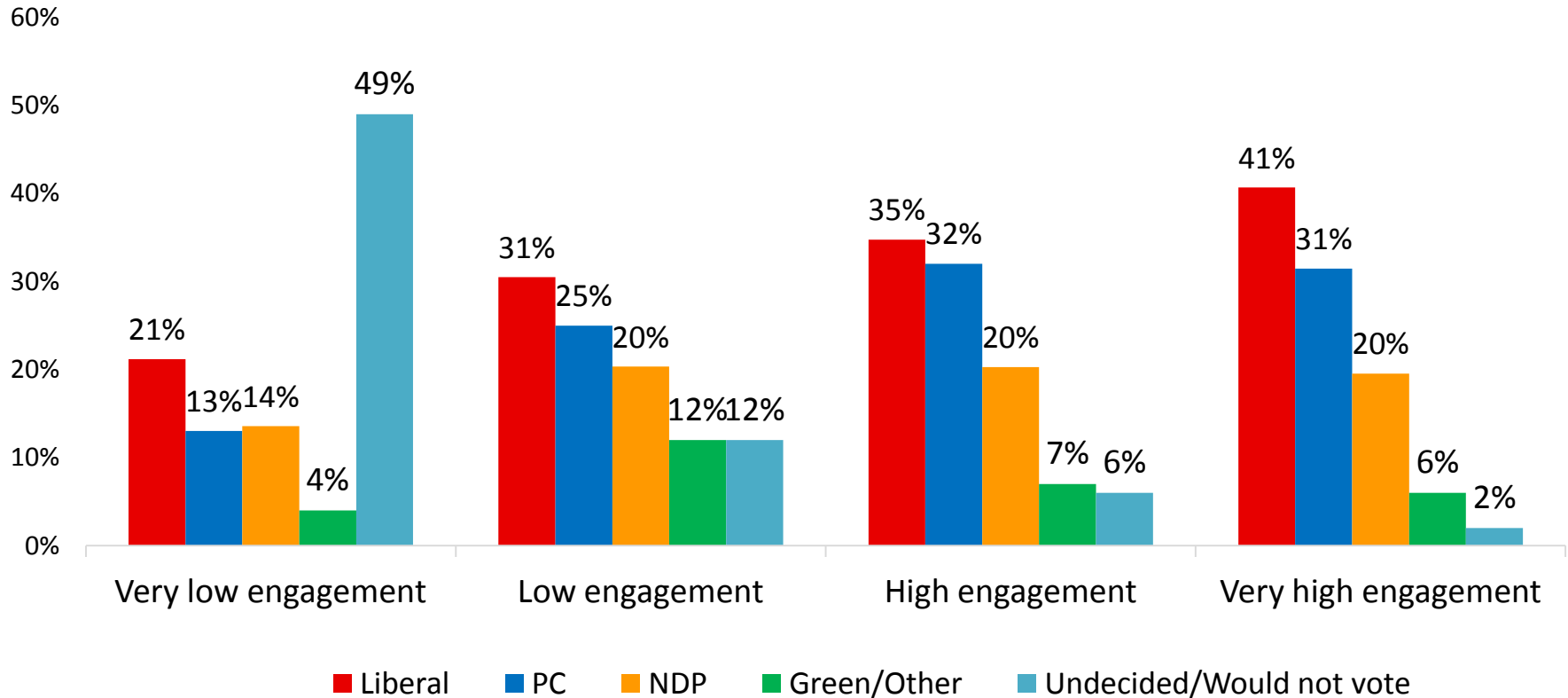The scale is split into 4 categories equal distances apart.

Very low engagement	Low engagement	High engagement	Very high engagement
13%	16%	40%	31%

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Combined vote by attention: low engagement voters unlikely to vote, Liberal lead grows along with engagement

Q If a provincial election were held today, which party would you vote for? **[Vote + lean]**
[answer among Liberal identifiers n=1450]

Combined vote by attention-based engagement

Legend: Liberal, PC, NDP, Green/Other, Undecided/Would not vote

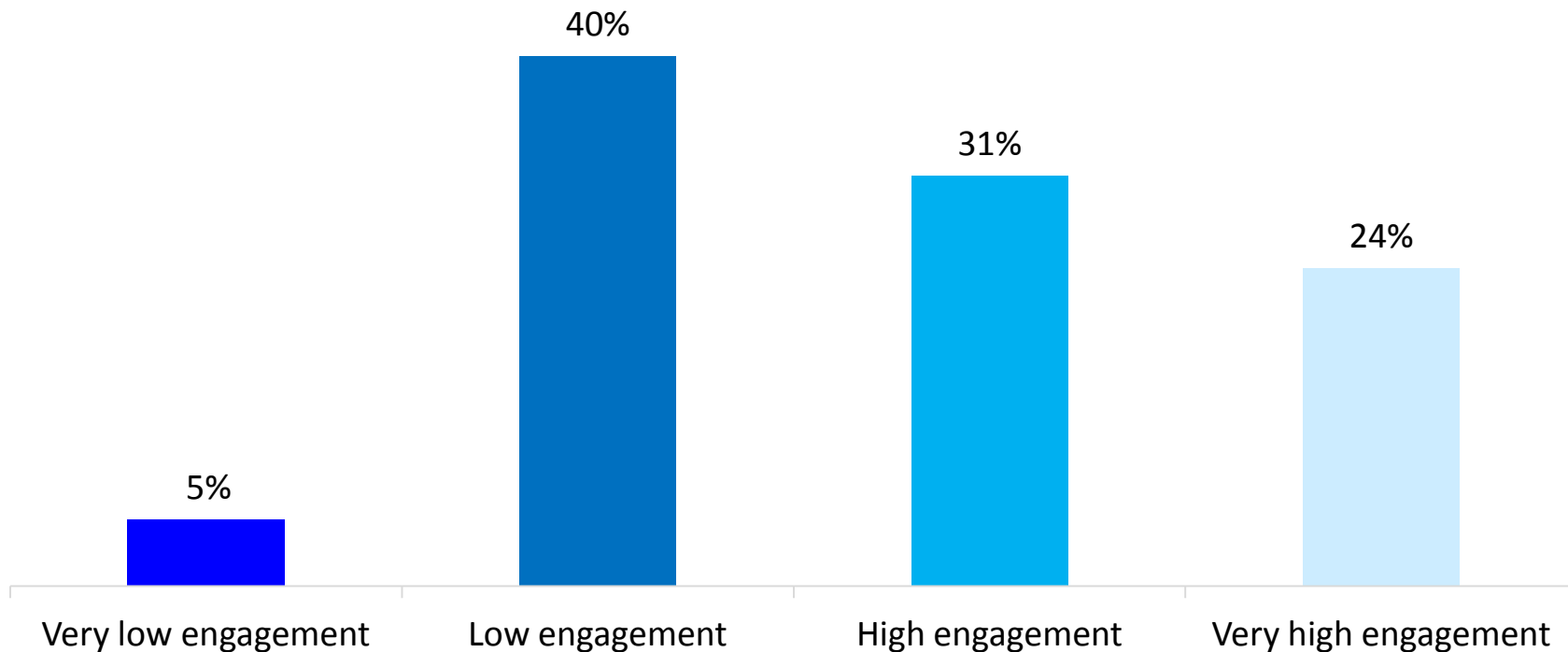| Engagement	Liberal	PC	NDP	Green/Other	Undecided/Would not vote
Very low engagement	21%	13%	14%	4%	49%
Low engagement	31%	25%	20%	12%	12%
High engagement	35%	32%	20%	7%	6%
Very high engagement	41%	31%	20%	6%	2%

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Emotional engagement

Emotional engagement is measured as an index of respondents' answers to 2 questions. They are asked whether they strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements:

- It doesn't matter who we vote for, all the parties end up doing the same things.
- Things could go very badly for Ontario if we choose the wrong party to form government.

Their answers are combined into a single scale, and the scale is split into 4 categories equal distances apart.
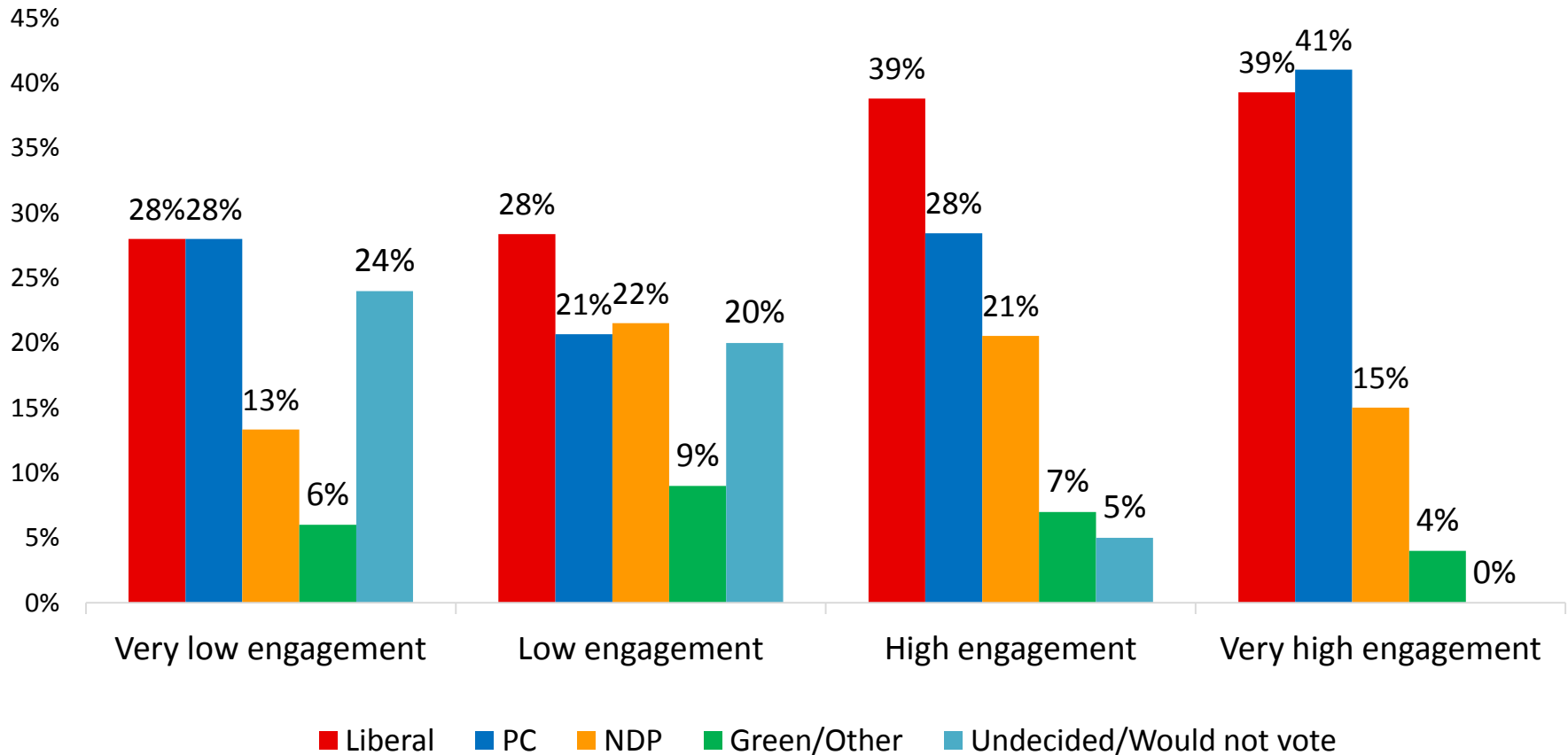

5%	40%	31%	24%
Very low engagement	Low engagement	High engagement	Very high engagement

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Combined vote by emotional engagement: Liberal lead shrinks as emotional engagement grows

Q If a provincial election were held today, which party would you vote for? **[Vote + lean]**
[answer among Liberal identifiers n=1450]

Combined vote by emotion-based engagement

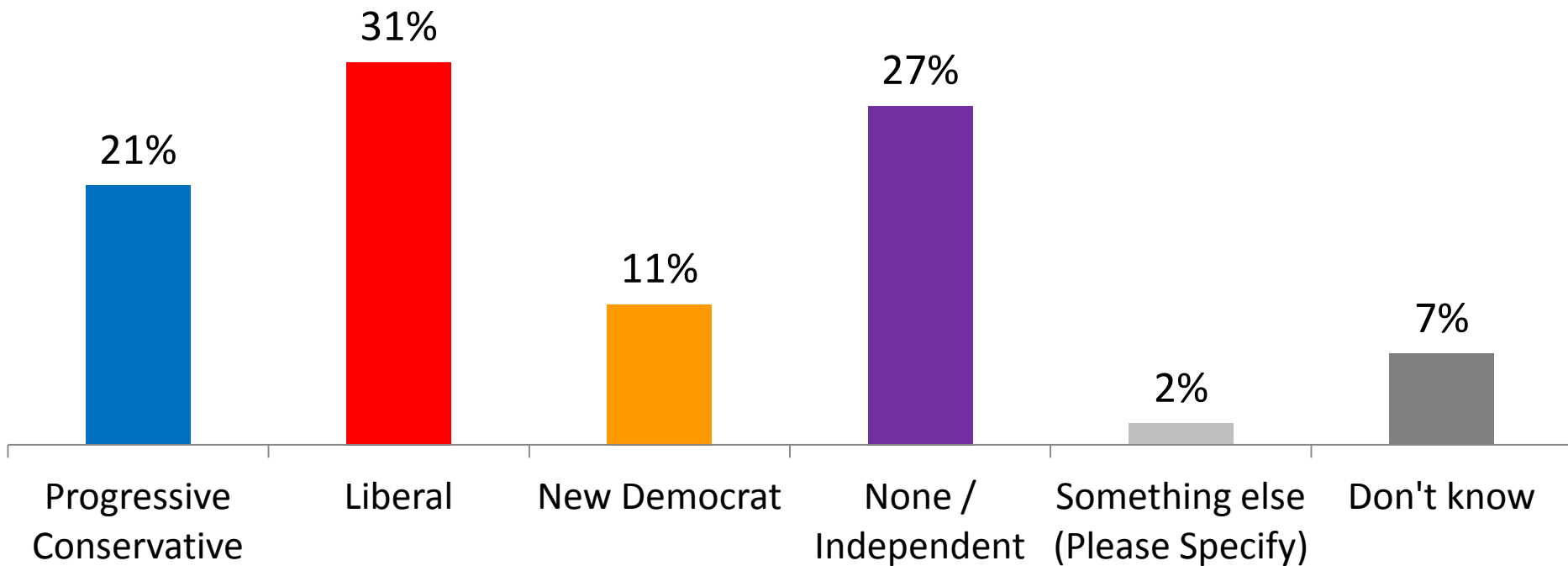|	Liberal	PC	NDP	Green/Other	Undecided/Would not vote
Very low engagement	28%	28%	13%	6%	24%
Low engagement	28%	21%	22%	9%	20%
High engagement	39%	28%	21%	7%	5%
Very high engagement	39%	41%	15%	4%	0%

Setting the Stage

Party Identification

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as [RANDOMIZE PARTIES]: a Progressive Conservative, a Liberal, a New Democrat, or something else or none of these?

Progressive Conservative	Liberal	New Democrat	None / Independent	Something else (Please Specify)	Don't know
21%	31%	11%	27%	2%	7%

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NDP and PC retaining over 80% of their traditional vote, but Liberals have just 65%

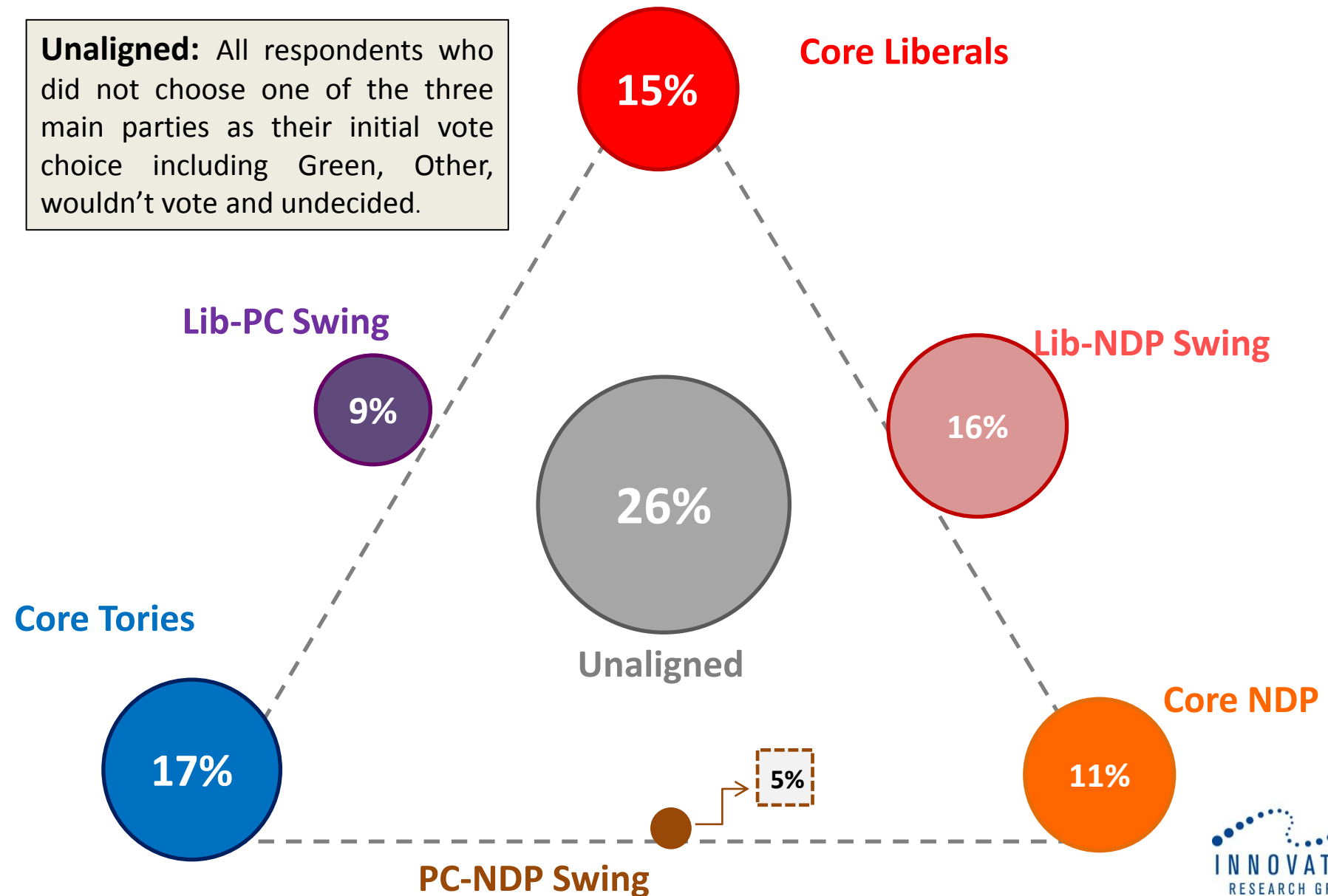**Q** **Vote by Party ID**

	Party ID – PC	Party ID – Liberal	Party ID – NDP	Independent /Undecided
PC	80%	8%	3%	16%
Liberal	8%	65%	7%	20%
NDP	4%	10%	80%	19%
Other	2%	1%	6%	7%
Independent/ Undecided/WNV	7%	14%	4%	35%

Note: 'Refused' not shown
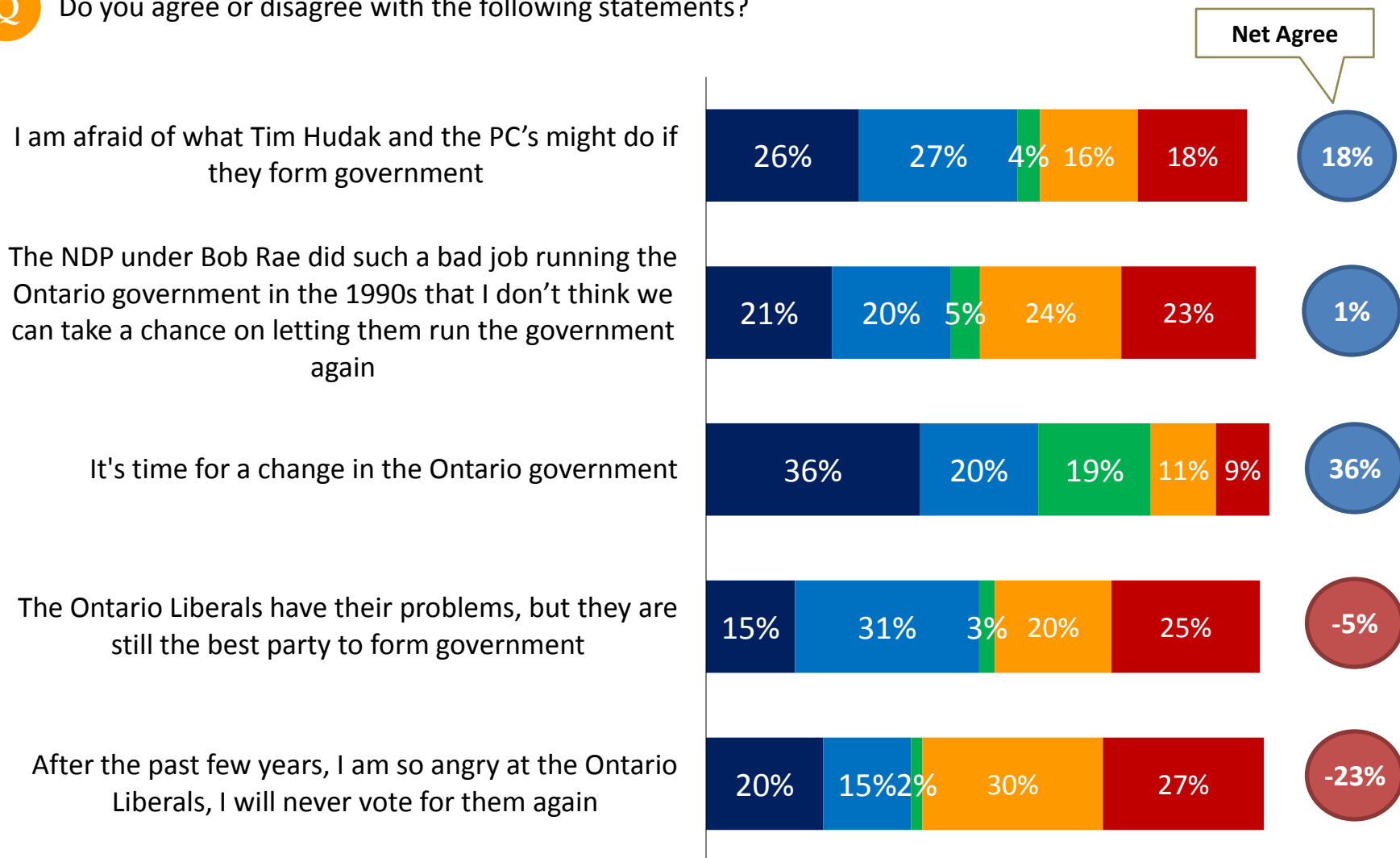
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Battleground Segments

Unaligned: All respondents who did not choose one of the three main parties as their initial vote choice including Green, Other, wouldn't vote and undecided.
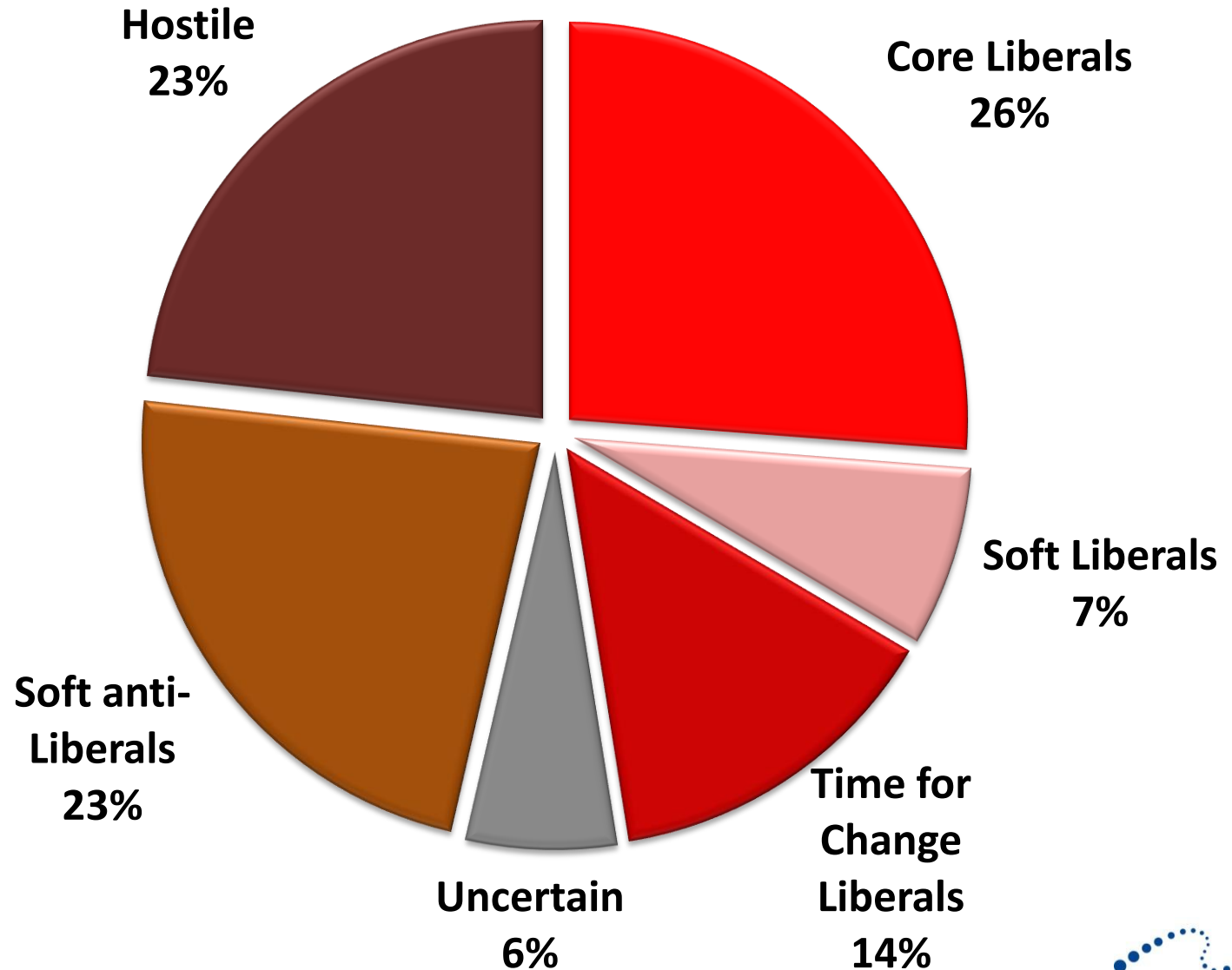
Core Liberals

15%

Lib-PC Swing

9%

Lib-NDP Swing

16%

26%

Unaligned

Core Tories

17%

Core NDP

11%

5%

PC-NDP Swing

More than half fear a PC government led by Tim Hudak, while 1-in-3 would never vote Liberal again

Q Do you agree or disagree with the following statements?

Net Agree

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Net Agree
I am afraid of what Tim Hudak and the PC's might do if they form government	26%	27%	4%	16%	18%	18%
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	21%	20%	5%	24%	23%	1%
It's time for a change in the Ontario government	36%	20%	19%	11%	9%	36%
The Ontario Liberals have their problems, but they are still the best party to form government	15%	31%	3%	20%	25%	-5%
After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again	20%	15%	2%	30%	27%	-23%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree

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Voter Conflict Segments

Hostile
23%

Core Liberals
26%

Soft Liberals
7%

Soft anti-Liberals
23%

Uncertain
6%

Time for Change Liberals
14%

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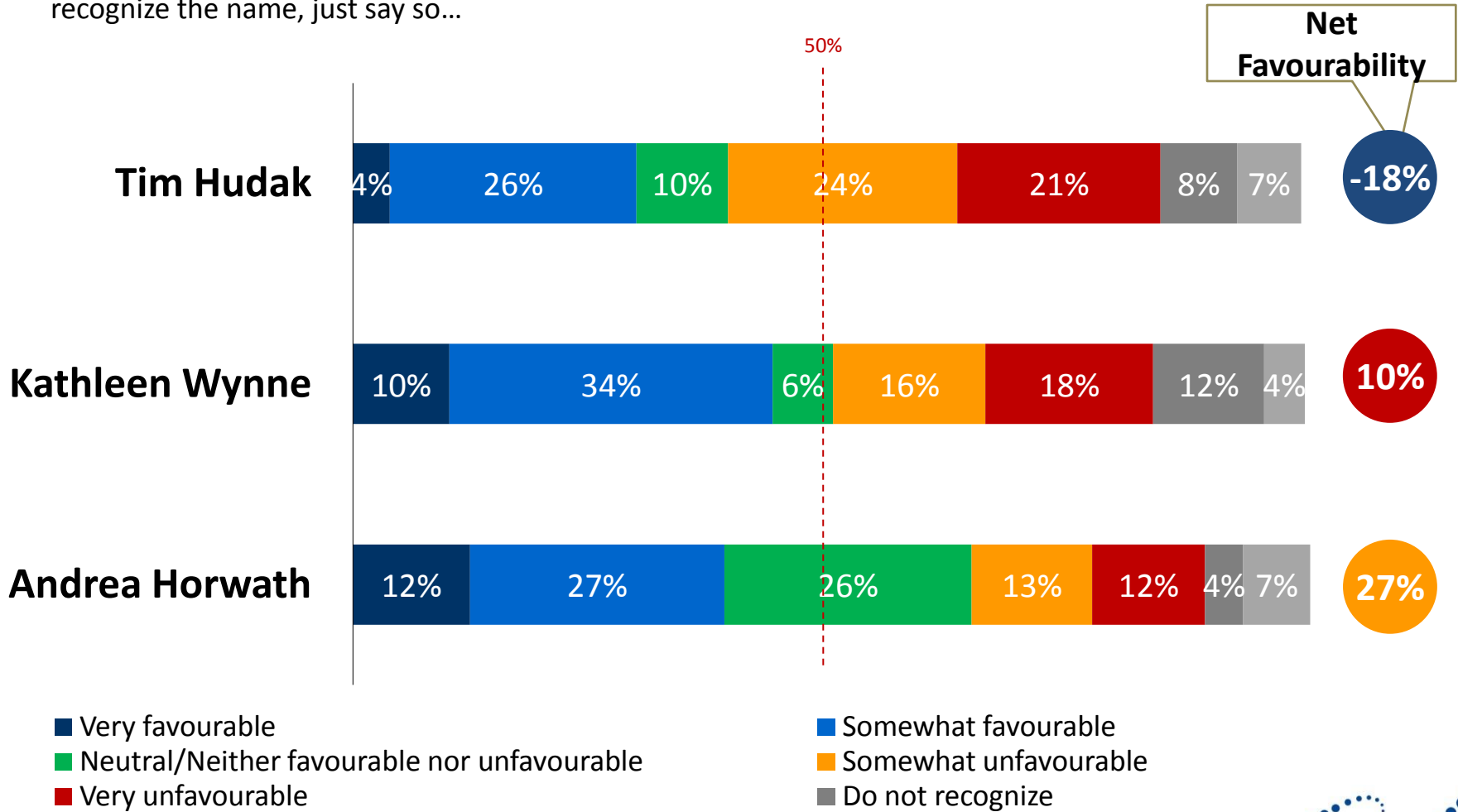
Hudak seen as unfavourable by almost 2-in-5; Wynne has higher favourables and unfavourables than Horwath

Q Now, I would like to read you the names of several individuals who have been mentioned in the news recently. For each one, please tell me whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just say so…
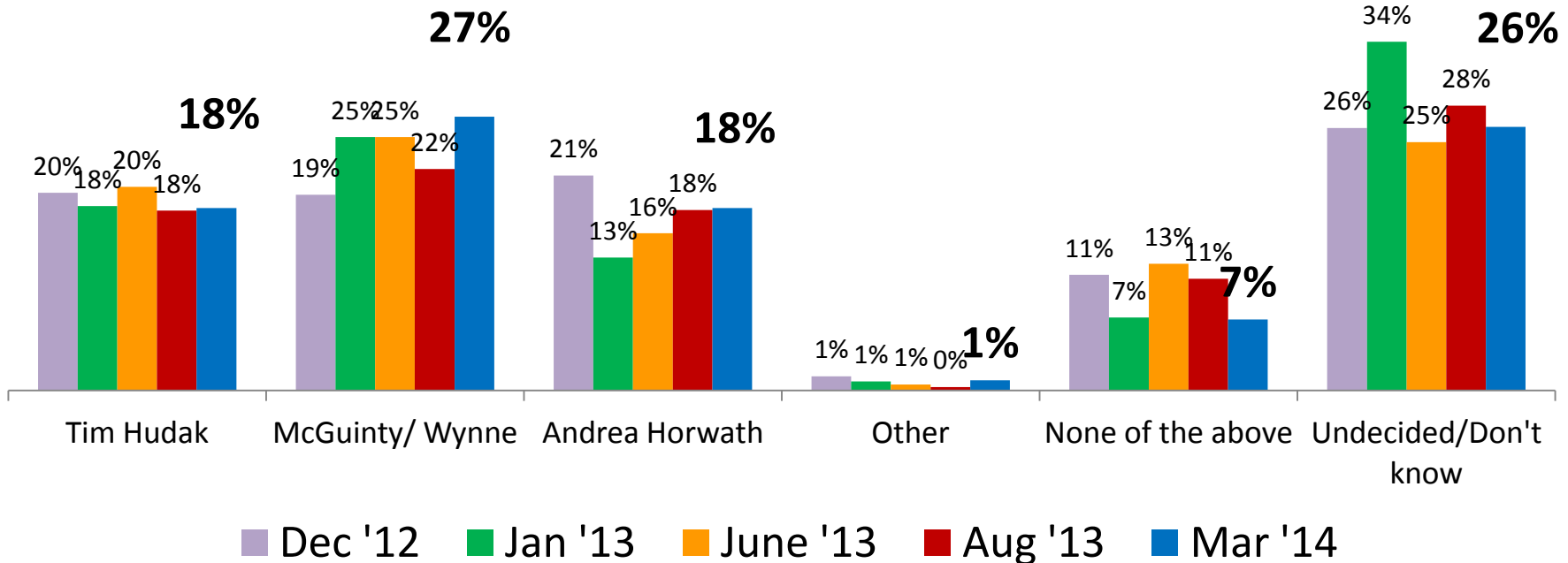
50%

Net Favourability

Tim Hudak
4% | 26% | 10% | 24% | 21% | 8% | 7%
-18%

Kathleen Wynne
10% | 34% | 6% | 16% | 18% | 12% | 4%
10%

Andrea Horwath
12% | 27% | 26% | 13% | 12% | 4% | 7%
27%

- ■ Very favourable
- ■ Neutral/Neither favourable nor unfavourable
- ■ Very unfavourable
- ■ Somewhat favourable
- ■ Somewhat unfavourable
- ■ Do not recognize

Note: 'Refused' not shown

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Wynne leads others by 9 points as best Premier, but over one quarter are undecided

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

Tim Hudak
- Dec '12: 20%
- Jan '13: 18%
- June '13: 20%
- Aug '13: 18%
- Mar '14: **18%**

McGuinty/ Wynne
- Dec '12: 19%
- Jan '13: 25%
- June '13: 25%
- Aug '13: 22%
- Mar '14: **27%**

Andrea Horwath
- Dec '12: 21%
- Jan '13: 13%
- June '13: 16%
- Aug '13: 18%
- Mar '14: **18%**

Other
- Dec '12: 1%
- Jan '13: 1%
- June '13: 1%
- Aug '13: 0%
- Mar '14: **1%**

None of the above
- Dec '12: 11%
- Jan '13: 7%
- June '13: 13%
- Aug '13: 11%
- Mar '14: **7%**

Undecided/Don't know
- Dec '12: 26%
- Jan '13: 34%
- June '13: 25%
- Aug '13: 28%
- Mar '14: **26%**

Legend: Dec '12 | Jan '13 | June '13 | Aug '13 | Mar '14

Note: 'Refused' / "would not vote" not shown

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Honest and accountable government 'absolutely critical' to more than half of Ontarians

Q There are a number of issues people have said could be important in the next election. Using a scale of 0 to 10 where **0 is not important at all** and **10 is absolutely critical**, how important would you say each of the following issues is to you?
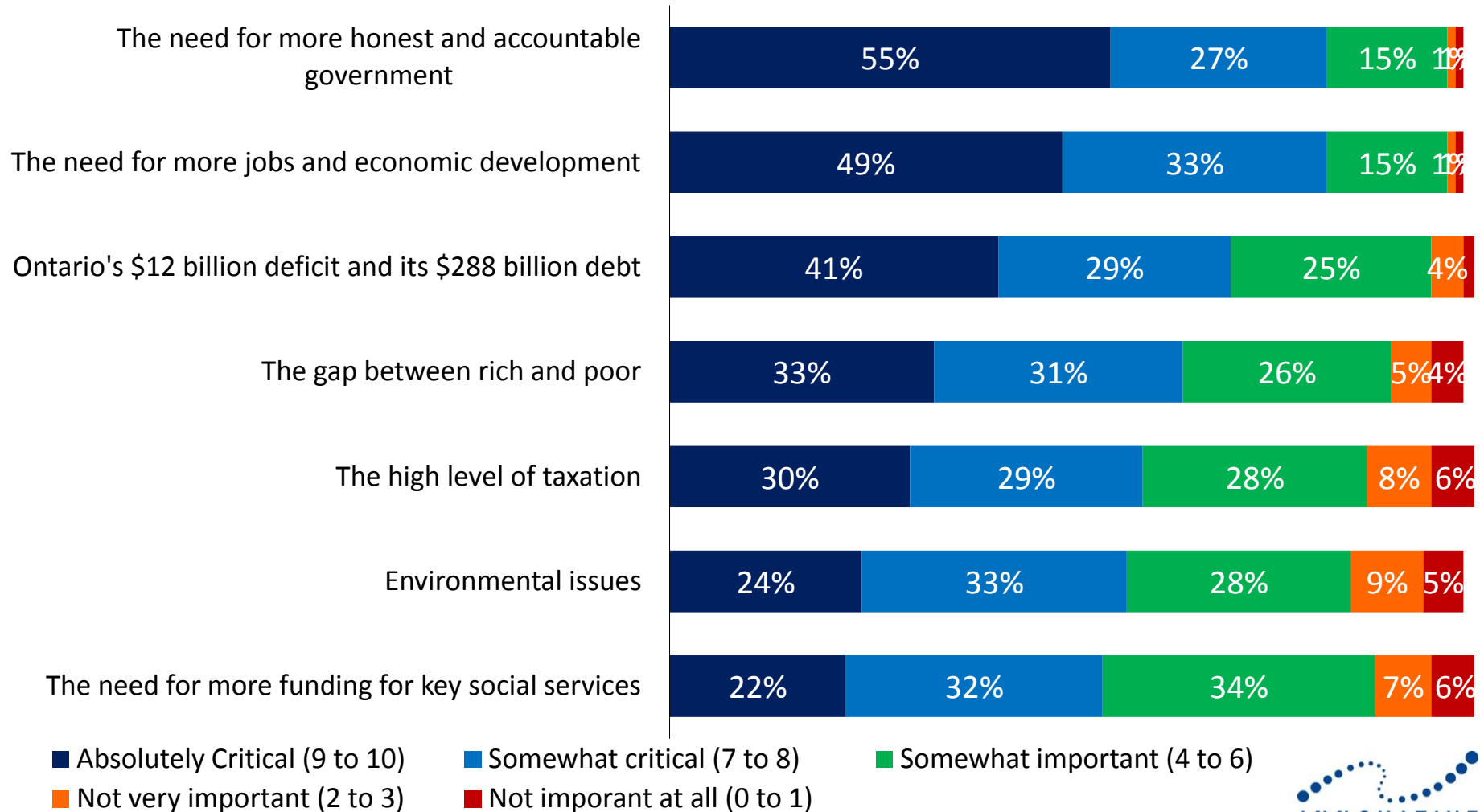
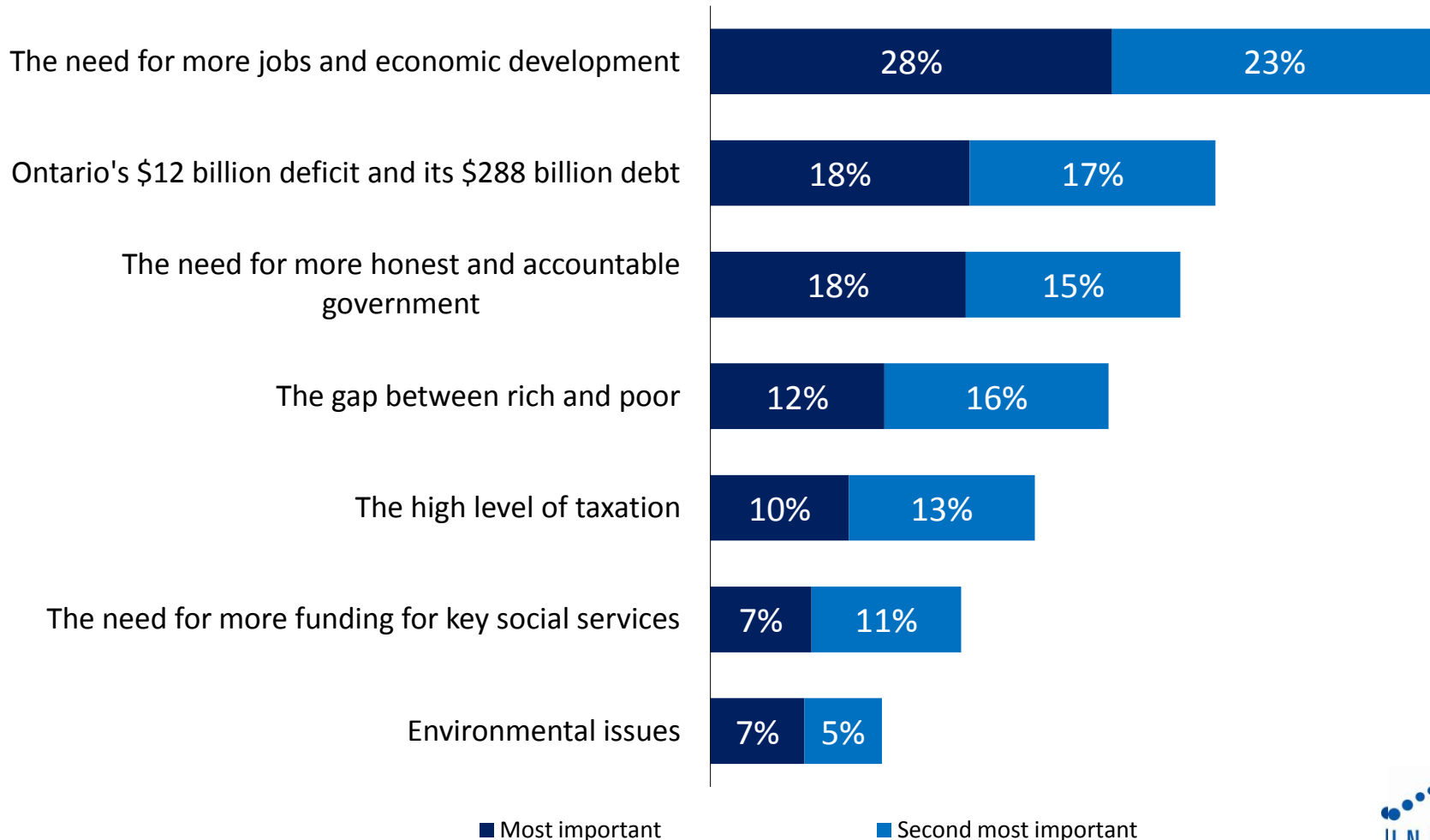| Issue	Absolutely Critical (9 to 10)	Somewhat critical (7 to 8)	Somewhat important (4 to 6)	Not very important (2 to 3)	Not important at all (0 to 1)
The need for more honest and accountable government	55%	27%	15%	1%	1%
The need for more jobs and economic development	49%	33%	15%	1%	1%
Ontario's $12 billion deficit and its $288 billion debt	41%	29%	25%	4%	
The gap between rich and poor	33%	31%	26%	5%	4%
The high level of taxation	30%	29%	28%	8%	6%
Environmental issues	24%	33%	28%	9%	5%
The need for more funding for key social services	22%	32%	34%	7%	6%

- ■ Absolutely Critical (9 to 10)
- ■ Somewhat critical (7 to 8)
- ■ Somewhat important (4 to 6)
- ■ Not very important (2 to 3)
- ■ Not imporant at all (0 to 1)

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Note: 'Don't Know' not shown

Jobs and economic development outrank the need for honest and accountable government

Q Looking again at these issues, which is the most important issue to you in this election? And which is the next most important?
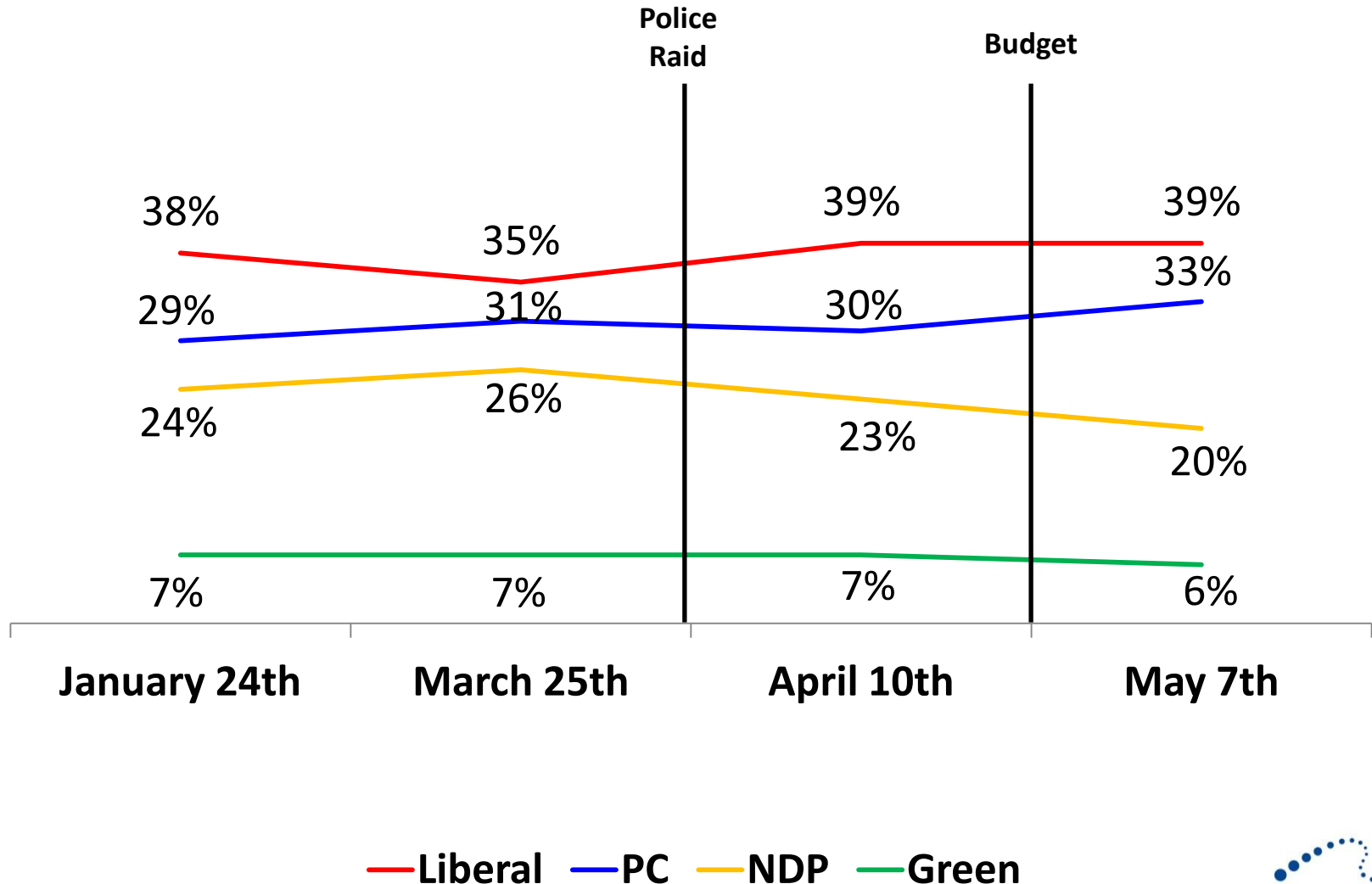

Issue	Most important	Second most important
The need for more jobs and economic development	28%	23%
Ontario's $12 billion deficit and its $288 billion debt	18%	17%
The need for more honest and accountable government	18%	15%
The gap between rich and poor	12%	16%
The high level of taxation	10%	13%
The need for more funding for key social services	7%	11%
Environmental issues	7%	5%

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 favourables - a core advantage in strong leadership.
    - Despite 10 years in power and 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.

The Campaign

Decided Vote Tracking 2014 – Online surveys

Q 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? **[Decided Vote]**

Police Raid

Budget

Liberal: 38% | 35% | 39% | 39%

PC: 29% | 31% | 30% | 33%

NDP: 24% | 26% | 23% | 20%

Green: 7% | 7% | 7% | 6%

January 24th | **March 25th** | **April 10th** | **May 7th**

— **Liberal** — **PC** — **NDP** — **Green**

PC voters are least satisfied with the provincial budget; majority of Liberals are satisfied with it.

Q In general, how satisfied are you with the provincial budget?

	PC	Liberal	NDP	Green	Unaligned	Total
Very satisfied	2%	25%	5%	6%	4%	12%
Somewhat satisfied	4%	54%	33%	9%	29%	29%
Somewhat dissatisfied	22%	15%	21%	25%	25%	20%
Very dissatisfied	65%	1%	26%	47%	19%	31%

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A majority support the decision to call an election, particularly Conservatives. Most Core Left oppose it.

Q On Friday, NDP leader Andrea Horwath announced that she is unwilling to support the Liberals on the budget they presented on Thursday. Since the current Liberal government is a minority government and the PC party already announced they would not support the budget, the premier has announced that there will be an election on June 12th. Do you support or oppose the decision of the Opposition parties to force a provincial election?

	Conser-vative	Business Liberal	Left Liberal	Core Left	New Labour	Penny Pinching Moderates	Total
Strongly support	54%	16%	17%	14%	16%	23%	28%
Somewhat support	23%	27%	27%	23%	33%	26%	25%
Somewhat oppose	9%	22%	18%	29%	11%	14%	17%
Strongly oppose	10%	17%	25%	28%	28%	14%	18%

Note: 'Don't know' not shown

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Change in Horwath's favourability from March to May 2014: Core and Soft Liberals have moved against her

Cluster Group	Cluster	March Net Score	May Net Score	March to May Swing
BATTLEGROUND	Core Liberals	1%	-25%	-27%
	Liberal/ NDP Swing	62%	54%	-7%
	Core NDP	73%	67%	-6%
	Tory/ NDP Swing	36%	46%	10%
	Core Tories	-37%	-43%	-6%
	Liberal/ Tory Swing	-6%	17%	23%
	Unaligned	1%	-11%	-12%
VOTE CONFLICT	Core Liberals	15%	-31%	-46%
	Soft Liberals	20%	0%	-21%
	Time for Change Liberals	30%	50%	20%
	Uncertain	18%	3%	-16%
	Soft anti-Liberals	28%	13%	-15%
	Hostile	-10%	-18%	-8%
VALUE CLUSTERS	Conservatives	-15%	-23%	-9%
	Business Liberals	24%	3%	-20%
	Anti-Business Liberals/Left Liberals	24%	2%	-22%
	Core Left	42%	15%	-27%
	New Labour	32%	10%	-22%
	Penny Pinching Moderates	10%	4%	-6%
TOTAL	TOTAL	14%	-2%	-17%

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Decided Vote Tracking 2014 – Online surveys

Q 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? **[Decided Vote]**

Police Raid — March 25th
Budget — April 10th / May 7th
Million Jobs Plan — May 22nd

Liberal: 38% · 35% · 39% · 39% · 45%
PC: 29% · 31% · 30% · 33% · 31%
NDP: 24% · 26% · 23% · 20% · 16%
Green: 7% · 7% · 7% · 6% · 8%

| January 24th | March 25th | April 10th | May 7th | May 22nd |
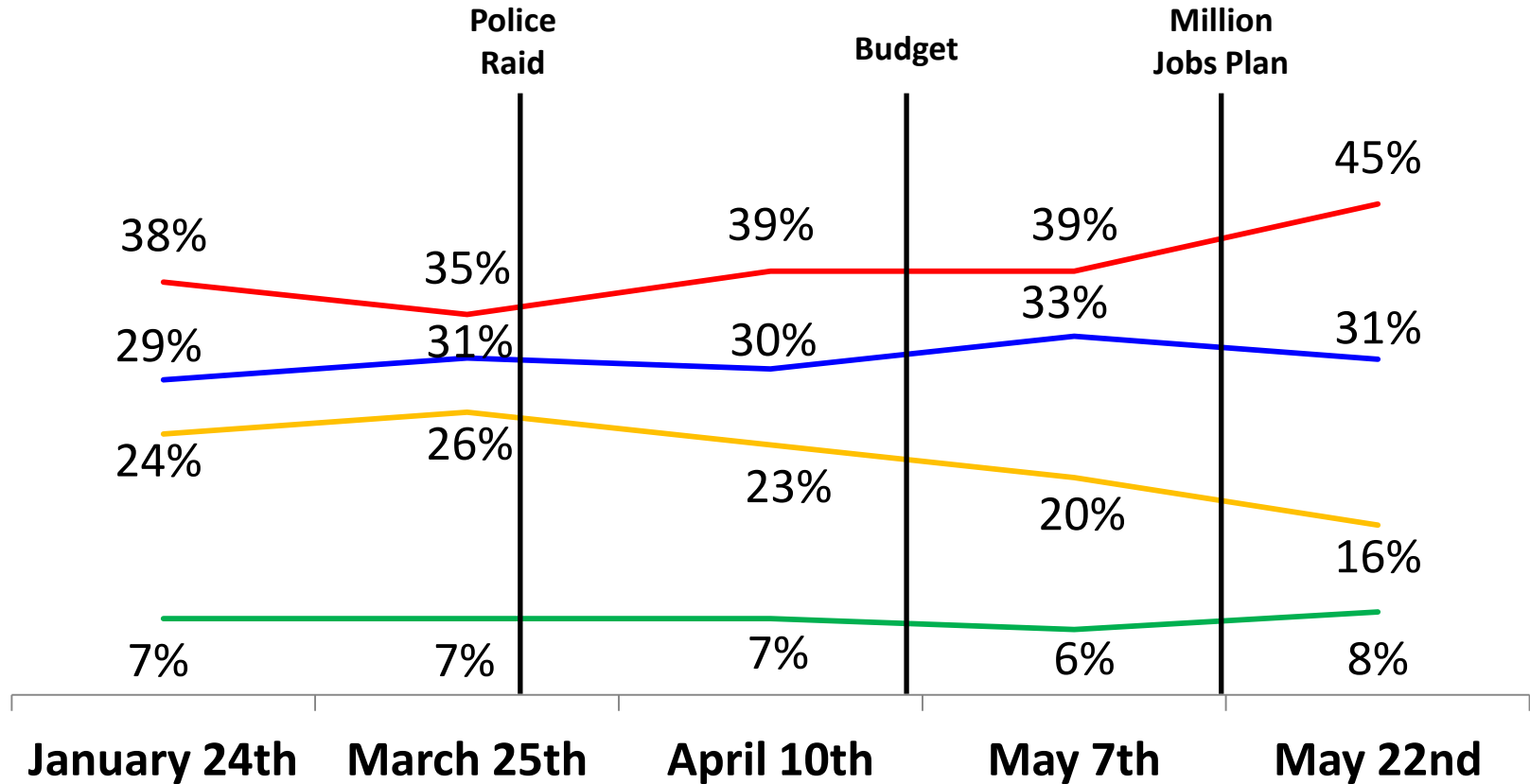
—— **Liberal** —— **PC** —— **NDP** —— **Green**

Million Jobs Plan: Non-PC groups less likely to vote PC after hearing about Million Jobs Plan, most a lot less likely

Q Thinking about politics in Ontario, general speaking, do you usually think of yourself as a…
AND
Did what you read, saw or heard about Tim Hudak's Million Jobs plan leave you feeling more or less likely to vote for the PC party?
[asked of all respondents, n=700]

	Party ID				
	PC	**Liberal**	**NDP**	**Green**	**Unaligned**
A lot more likely	28%	2%	4%	0%	3%
Somewhat more likely	26%	7%	14%	0%	7%
No difference	29%	16%	18%	36%	38%
Somewhat less likely	8%	11%	3%	8%	18%
A lot less likely	9%	64%	62%	56%	34%
Net Likelihood	*37%*	*-66%*	*-47%*	*-64%*	*-43%*

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100,000 Cuts: All non-PC groups less likely to vote for PC after hearing about reducing government workers in ON

Q Thinking about politics in Ontario, general speaking, do you usually think of yourself as a...
AND
As part of his Million Job plan, Tim Hudak announced he was reducing the size of government by reducing the number of government workers in Ontario by 10% or about 100,000 jobs. Does the PC plan to reduce the number of government workers in Ontario by 10% or about 100,000 jobs leave you feeling more or less likely to vote for the PC party?

[asked of all respondents, n=700]

Party ID

	PC	Liberal	NDP	Green	Unaligned
A lot more likely	33%	4%	5%	0%	10%
Somewhat more likely	22%	7%	5%	4%	11%
No difference	27%	20%	24%	27%	28%
Somewhat less likely	7%	11%	4%	29%	12%
A lot less likely	10%	59%	62%	39%	39%
Net Likelihood	**39%**	**-59%**	**-56%**	**-65%**	**-31%**

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Opinion on Tim Hudak is polarizing. A lot of voters find him very *unfavourable* and while others find him very *favourable*.

Q Below are the names of Ontario's party leaders. For each one, please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. – *Tim Hudak, PC*
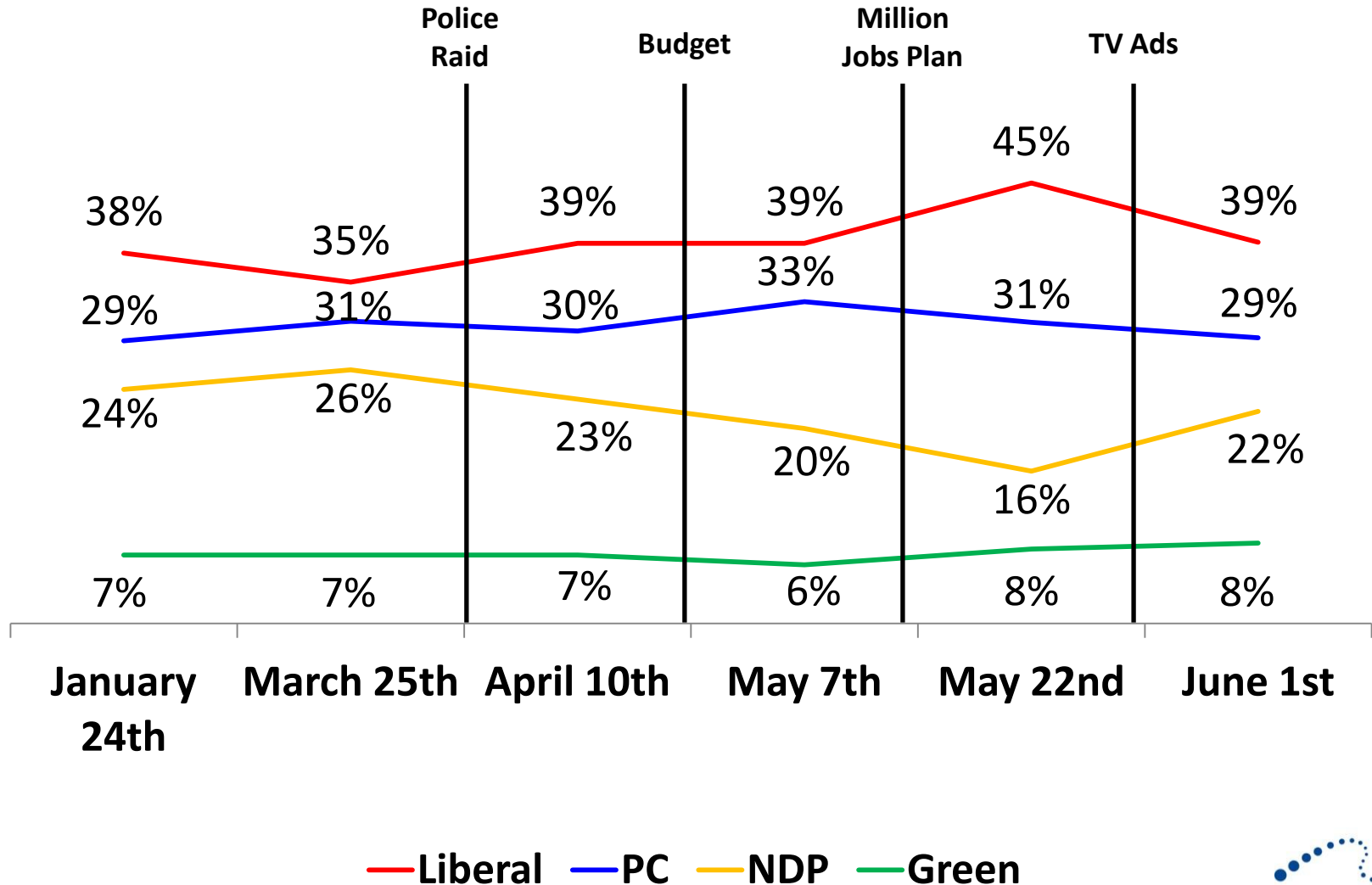

	Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable
Mar '14	8%	19%	21%	16%	36%
Campaign Start	8%	19%	21%	15%	36%
Now	12%	17%	15%	16%	41%
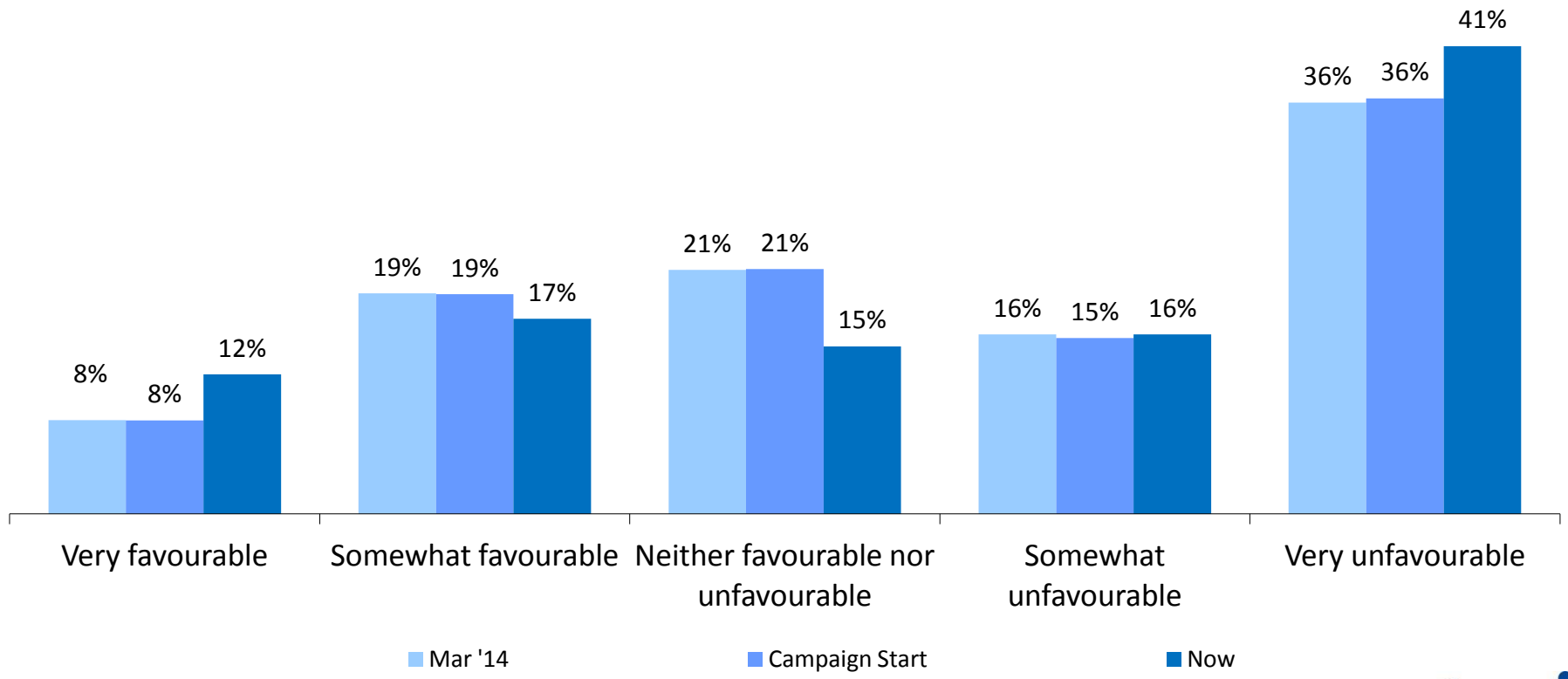
Note: 'Don't know/Do not recognize' not shown

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Decided Vote Tracking 2014 – Online surveys

Q 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? **[Decided Vote]**

Police Raid — Budget — Million Jobs Plan — TV Ads

	January 24th	March 25th	April 10th	May 7th	May 22nd	June 1st
Liberal	38%	35%	39%	39%	45%	39%
PC	29%	31%	30%	33%	31%	29%
NDP	24%	26%	23%	20%	16%	22%
Green	7%	7%	7%	6%	8%	8%

— **Liberal** — **PC** — **NDP** — **Green**

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Liberal ads: Diagnostics Breakdown

Q What was your overall impression of the ad? *Liberal*

> Among Liberal ads, the TV ad "Choices" had the strongest net positive image. "Hudak: Guts middle class" was seen as most negative.
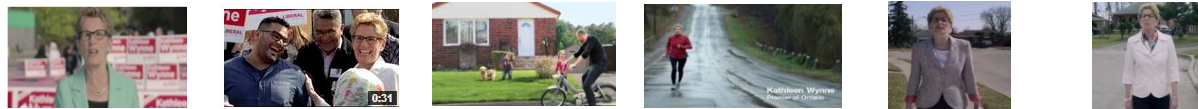
	"Choices"	"Build Ontario Up"	"Hudak: Guts middle class"	"Never stop"	"the PC Record"	"The NDP Record"
Very positive	26%	24%	15%	21%	23%	17%
Somewhat positive	28%	31%	20%	25%	29%	31%
Completely neutral	27%	21%	29%	33%	22%	22%
Somewhat negative	9%	14%	12%	10%	13%	14%
Very negative	10%	10%	23%	11%	12%	15%
Total	100%	100%	100%	100%	100%	100%
Positive	54%	54%	35%	47%	52%	48%
Negative	19%	25%	35%	20%	26%	30%
Net Positivity	35%	30%	0%	26%	27%	18%

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Ad Tracking: Did it mobilize, create backlash or persuade voters?

Liberal: "Hudak Guts Middle Class"

	Party ID				
	PC	**Liberal**	**NDP**	**Green**	**Unaligned**
Vote PC Net Impact	36%	-59%	-29%	-63%	-33%
Vote Liberal Net Impact	-56%	74%	1%	3%	-6%
Vote NDP Net Impact	-9%	-18%	26%	-22%	12%

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PC ads: Diagnostics Breakdown

Q What was your overall impression of the ad? *PC*

The PC TV ad concepts, "Ontario, Working. Better" and "Million Jobs Plan" were both seen as more positive overall than the PC ad concept "Doors".
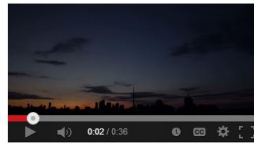
	"Ontario.Working.Better"	"Million jobs plan: hope is on the way"	"Doors"
Very positive	20%	23%	15%
Somewhat positive	27%	25%	21%
Completely neutral	30%	26%	28%
Somewhat negative	11%	10%	14%
Very negative	12%	16%	23%
Total	100%	100%	100%

Positive	47%	48%	35%
Negative	23%	26%	37%
Net Positivity	24%	21%	-2%

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Ad Tracking: Did it mobilize, create backlash or persuade voters?

PC: "Ontario. Working. Better"

Party ID

	PC	Liberal	NDP	Green	Unaligned
Vote PC Net Impact	60%	-40%	-27%	-23%	-7%
Vote Liberal Net Impact	-55%	39%	-11%	-13%	-10%
Vote NDP Net Impact	-27%	-7%	66%	48%	5%

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NDP ads: Diagnostics Breakdown

Q What was your overall impression of the ad? *NDP*

Overwhelming majority view ad "Andrea Horwath: A leader that makes sense" positively, contrastingly, "The Liberal Record" scored lower in positivity with viewers.

	"The Liberal Record"	"Andrea Horwath – A leader that makes sense"
Very positive	16%	34%
Somewhat positive	23%	36%
Completely neutral	25%	24%
Somewhat negative	21%	5%
Very negative	15%	2%
Total	100%	100%

Positive	39%	69%
Negative	36%	7%
Net Positivity	3%	62%

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Ad Tracking: Did it mobilize, create backlash or persuade voters?

NDP: "Andrea Horwath – A leader that makes sense"

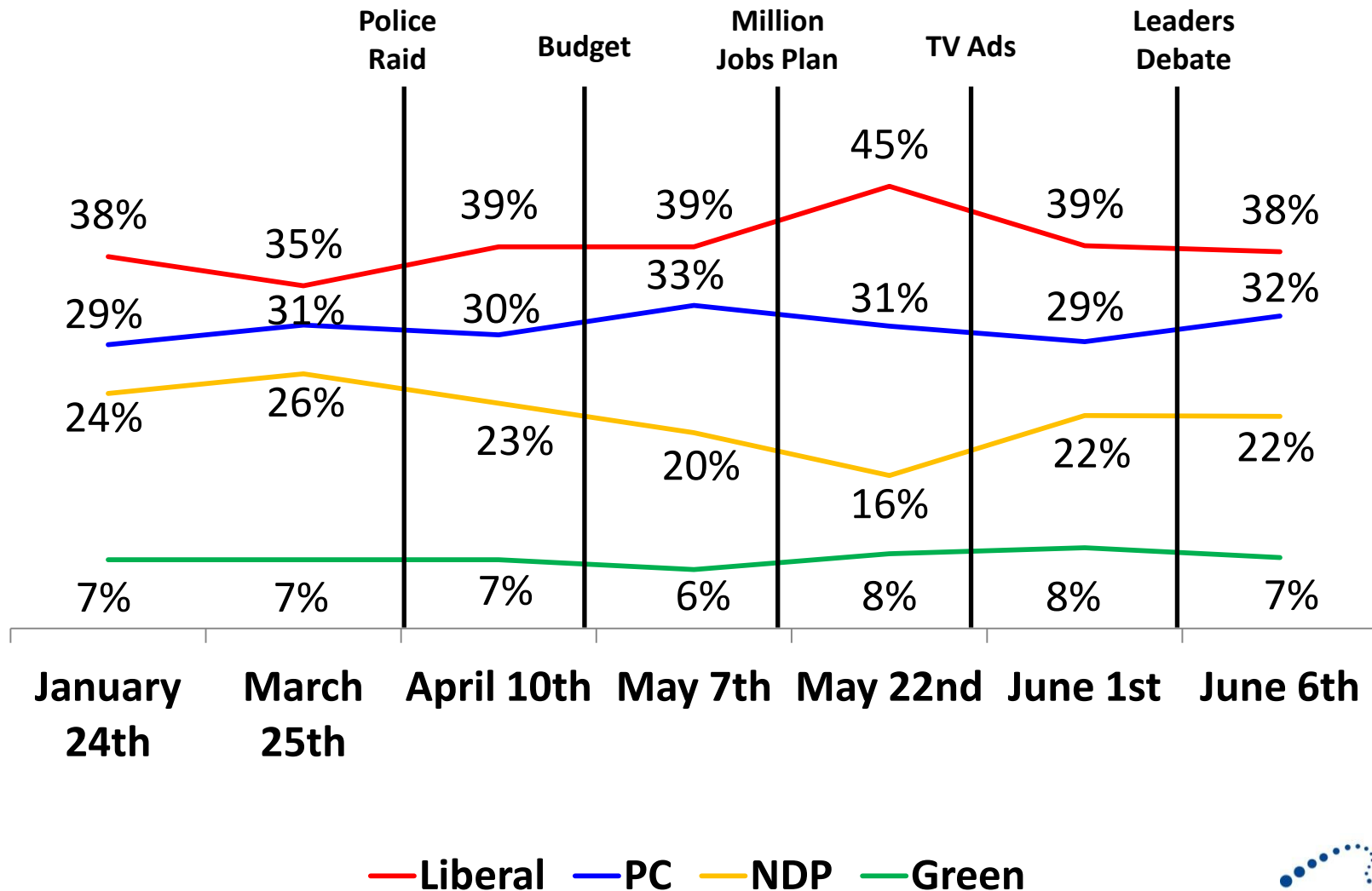|	Party ID				
	PC	**Liberal**	**NDP**	**Green**	**Unaligned**
Vote PC Net Impact	20%	-47%	-61%	-73%	-14%
Vote Liberal Net Impact	-52%	29%	-21%	6%	-3%
Vote NDP Net Impact	2%	26%	70%	33%	25%

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Decided Vote Tracking 2014 – Online surveys

Q 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? **[Decided Vote]**
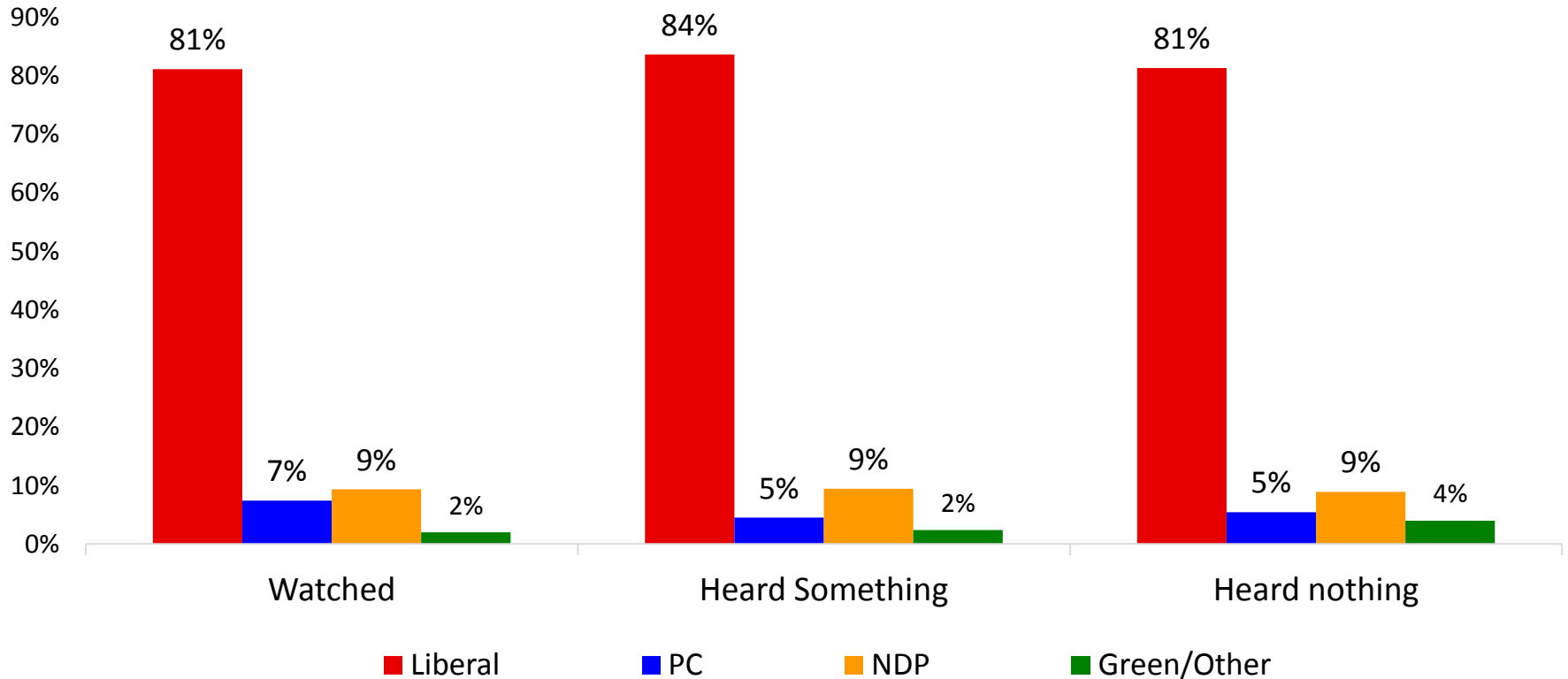
Police Raid | Budget | Million Jobs Plan | TV Ads | Leaders Debate

	January 24th	March 25th	April 10th	May 7th	May 22nd	June 1st	June 6th
Liberal	38%	35%	39%	39%	45%	39%	38%
PC	29%	31%	30%	33%	31%	29%	32%
NDP	24%	26%	23%	20%	16%	22%	22%
Green	7%	7%	7%	6%	8%	8%	7%

— Liberal — PC — NDP — Green

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Decided vote debate effect among Liberals: Virtually no effect on vote for Liberals from watching debate

Q If a provincial election were held today, which party would you vote for? **[decided vote only]**
[answer among Liberal identifiers n=435]
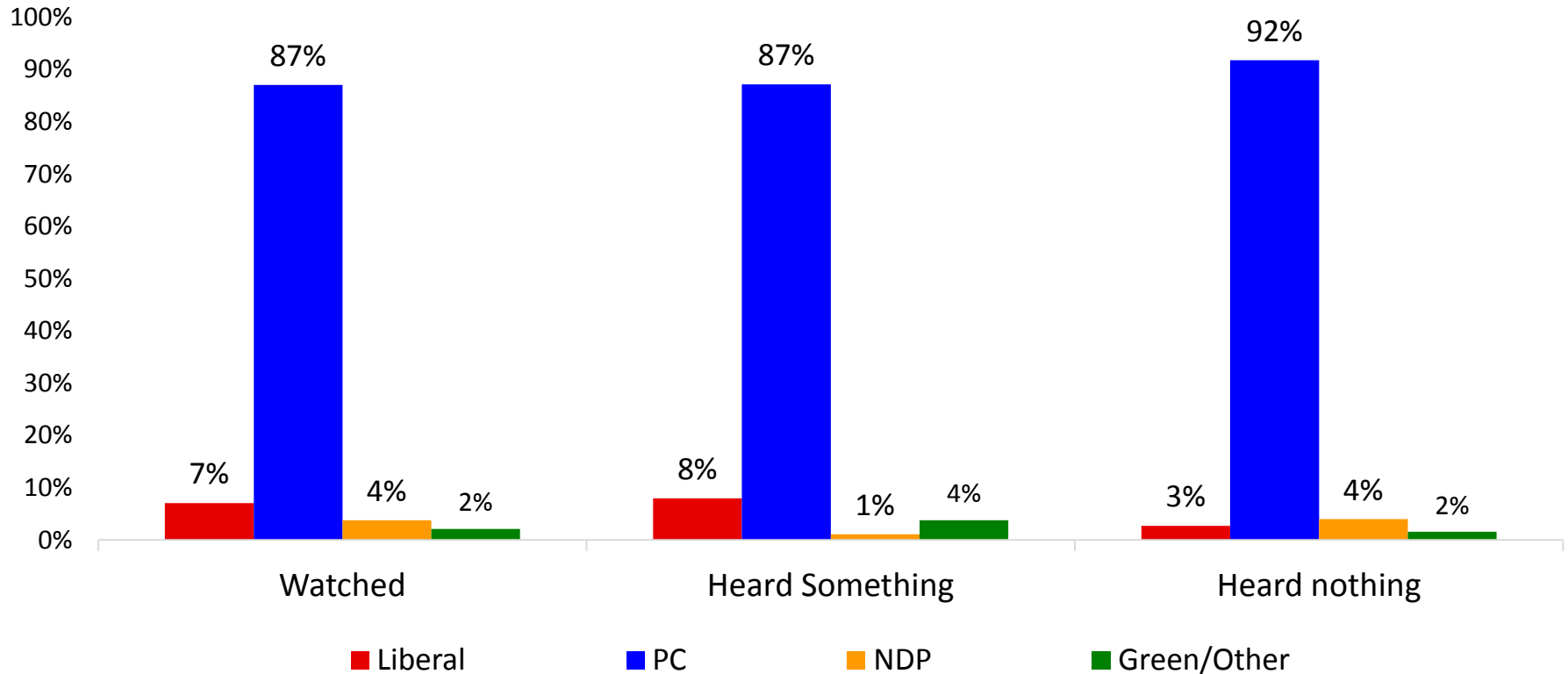
Liberal identifiers vote choice by viewership

Legend: Liberal | PC | NDP | Green/Other

Watched: Liberal 81%, PC 7%, NDP 9%, Green/Other 2%
Heard Something: Liberal 84%, PC 5%, NDP 9%, Green/Other 2%
Heard nothing: Liberal 81%, PC 5%, NDP 9%, Green/Other 4%

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Decided vote debate effect among PCs: Similar lack of effect among decided vote as seen on combined vote

Q If a provincial election were held today, which party would you vote for? **[Decided vote only]**
[answer among PC identifiers n=369]

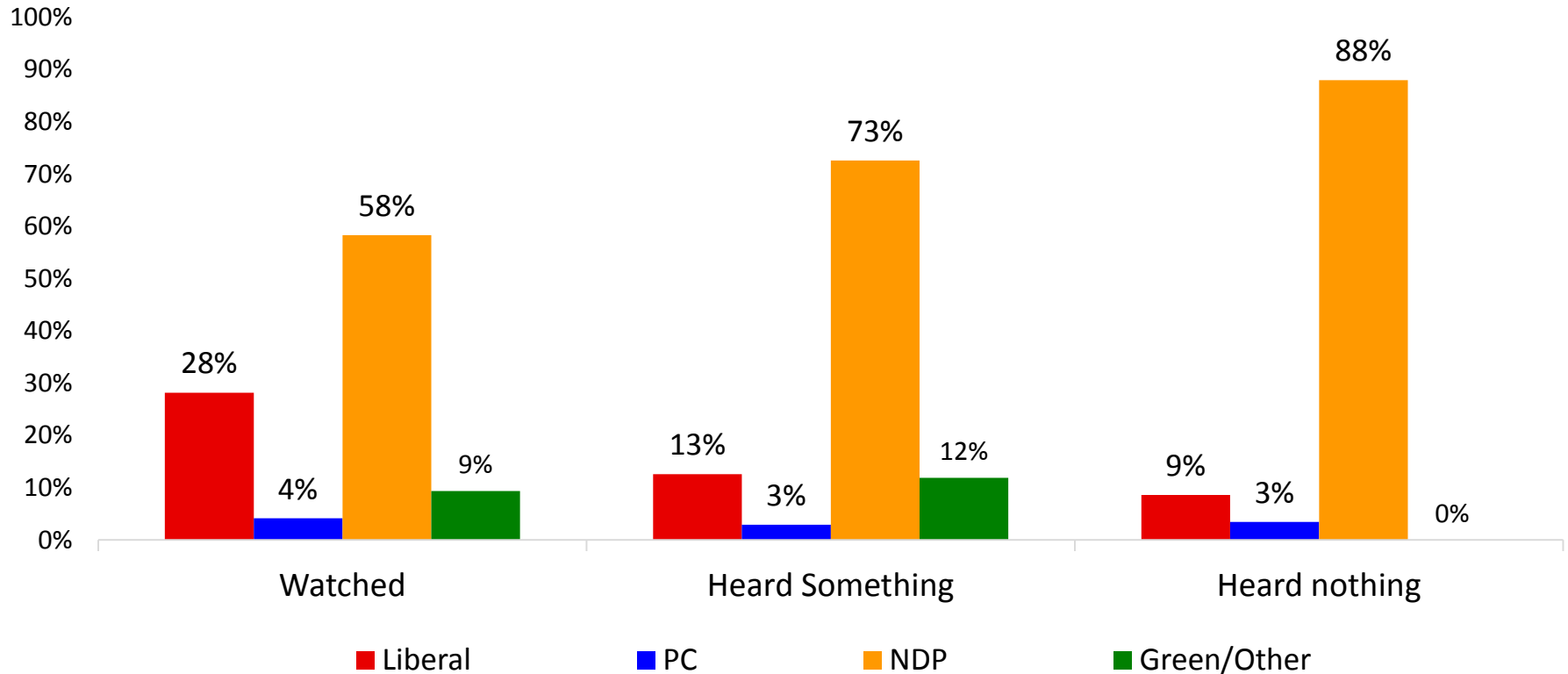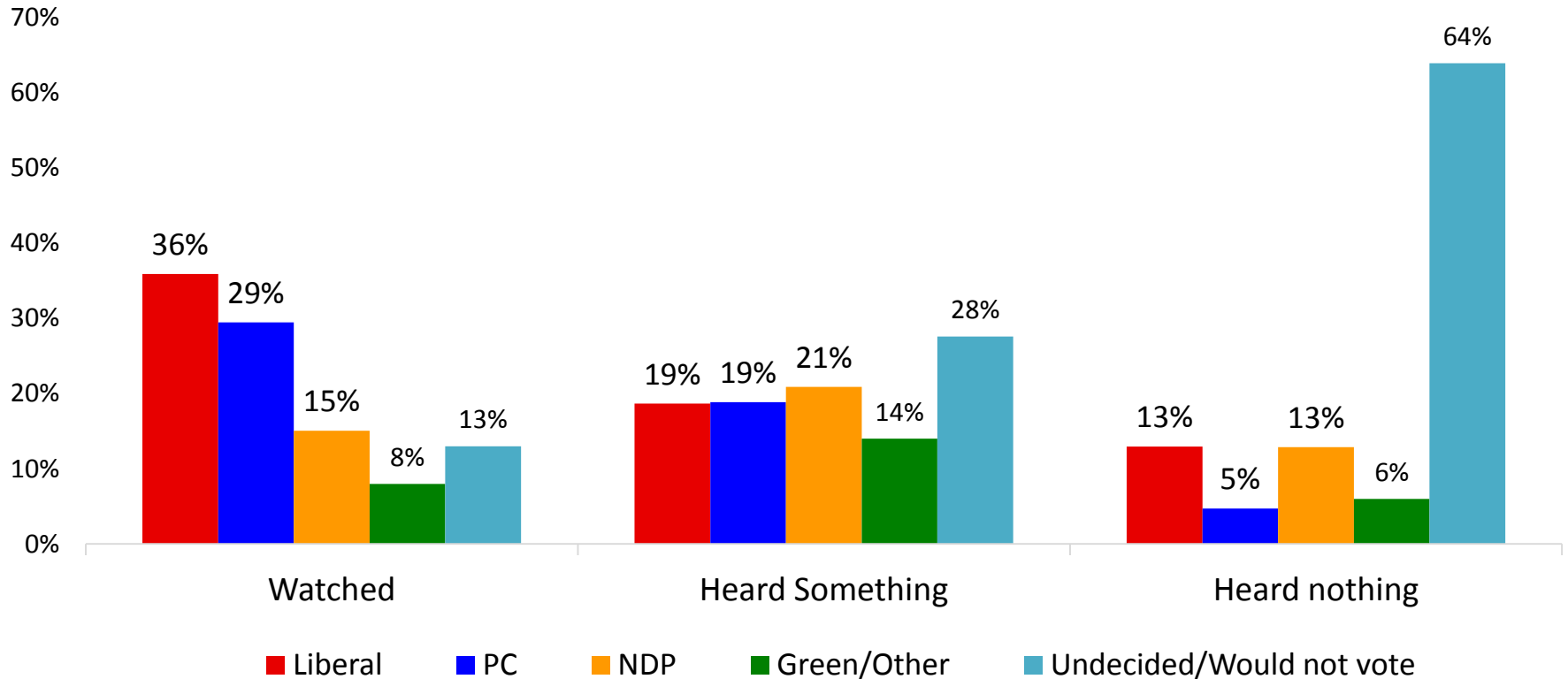## PC identifiers vote choice by viewership

Watched
- Liberal: 7%
- PC: 87%
- NDP: 4%
- Green/Other: 2%

Heard Something
- Liberal: 8%
- PC: 87%
- NDP: 1%
- Green/Other: 4%

Heard nothing
- Liberal: 3%
- PC: 92%
- NDP: 4%
- Green/Other: 2%

Legend: ■ Liberal ■ PC ■ NDP ■ Green/Other

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Decided vote debate effect among NDP: Big boost for Liberals among NDP watchers on decided vote as well

Q If a provincial election were held today, which party would you vote for? **[Decided vote only]**
[answer among NDP identifiers n=232]

NDP Identifiers vote choice by viewership

Legend: Liberal, PC, NDP, Green/Other

	Liberal	PC	NDP	Green/Other
Watched	28%	4%	58%	9%
Heard Something	13%	3%	73%	12%
Heard nothing	9%	3%	88%	0%

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Combined vote debate effect among unaligned: PC and Liberals benefit among those who watch, while NDP does not

Q **If a provincial election were held today, which party would you vote for? [vote + lean]**
[answer among unaligned identifiers n=332]

Unaligned identifiers vote choice by viewership

Legend: Liberal | PC | NDP | Green/Other | Undecided/Would not vote

Watched: Liberal 36%, PC 29%, NDP 15%, Green/Other 8%, Undecided/Would not vote 13%

Heard Something: Liberal 19%, PC 19%, NDP 21%, Green/Other 14%, Undecided/Would not vote 28%

Heard nothing: Liberal 13%, PC 5%, NDP 13%, Green/Other 6%, Undecided/Would not vote 64%

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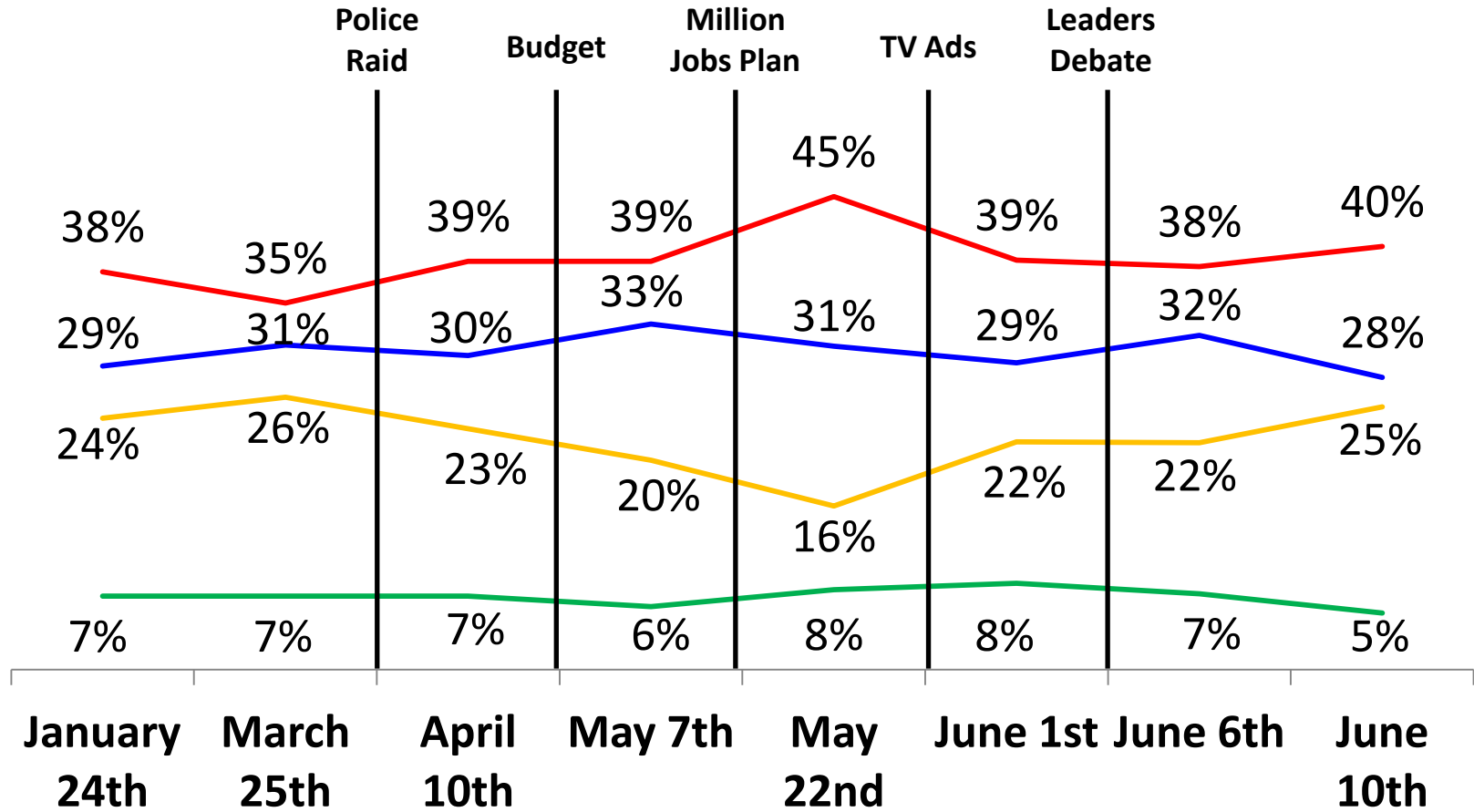
Value Clusters
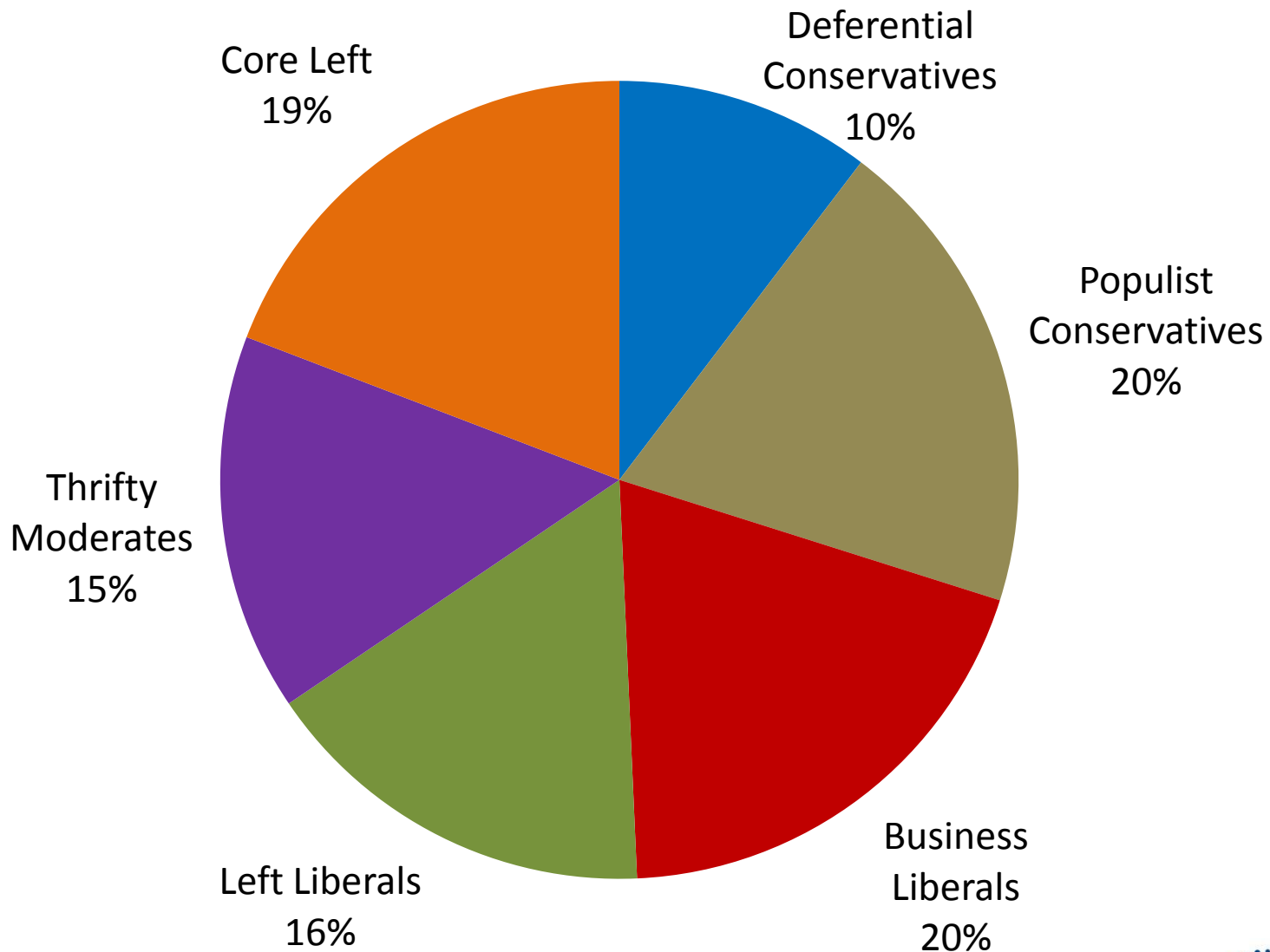
Liberal vote change by Cluster: Liberals gained or held steady with every group

Cluster	January 14	June 14	Change
Deferential Conservatives	23%	31%	+8%
Populist Conservatives	9%	22%	+11%
Business Liberals	38%	54%	+16%
Left Liberals	44%	53%	+9%
Thrifty Moderates	44%	45%	+1%
Core Left	39%	50%	+11%

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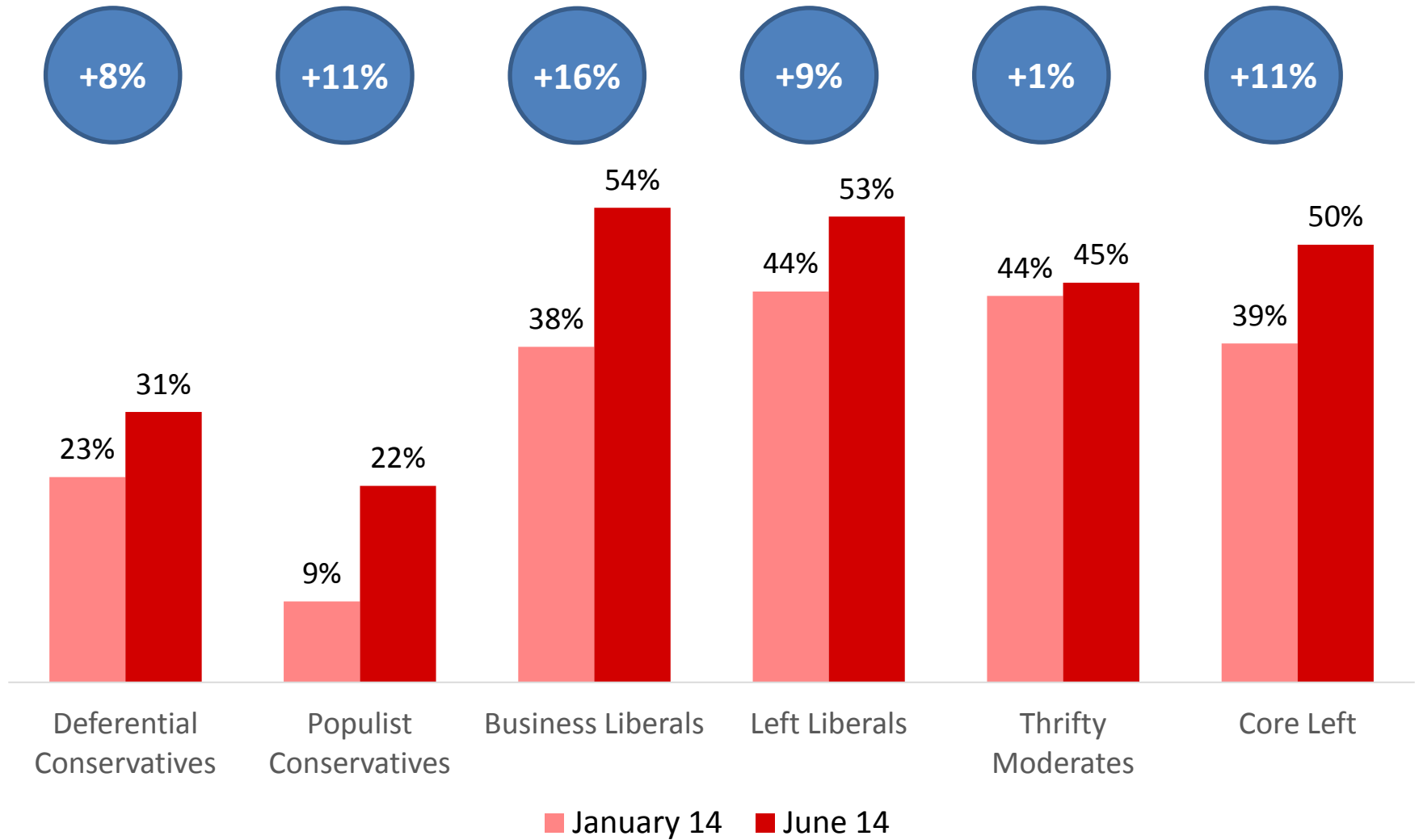
PC vote change by Cluster: Hudak lost close to 10 points with both conservative groups

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
-9%	**-10%**	**-9%**	**+2%**	**+5%**	**+8%**

Deferential Conservatives: 55% / 46%
Populist Conservatives: 77% / 67%
Business Liberals: 30% / 21%
Left Liberals: 11% / 13%
Thrifty Moderates: 17% / 22%
Core Left: 0% / 8%

■ January 24 ■ June 13

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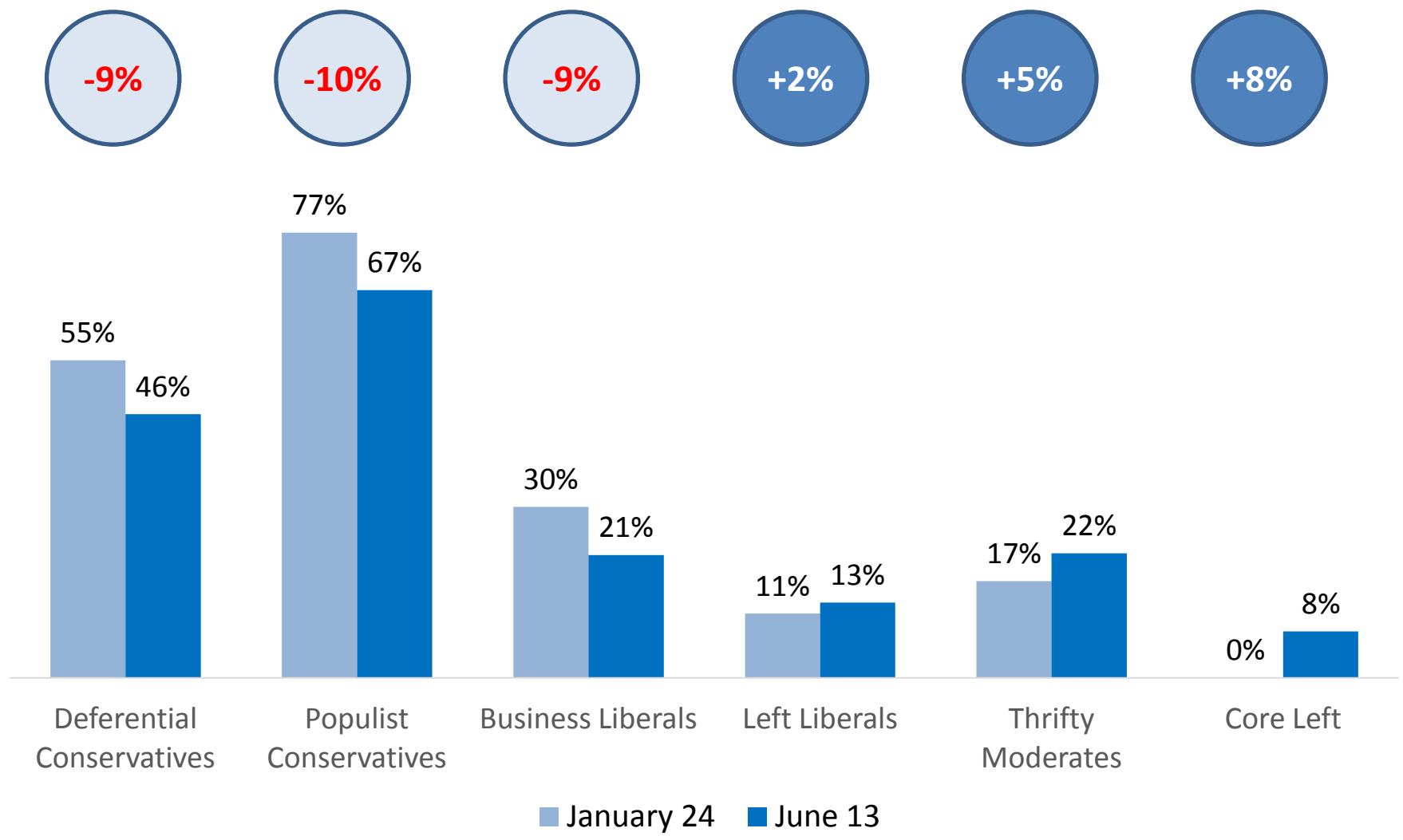
NDP vote change by Cluster: the NDP lost almost half of their vote among the core left

Cluster	Change
Deferential Conservatives	-1%
Populist Conservatives	-6%
Business Liberals	0%
Left Liberals	-13%
Thrifty Moderates	-7%
Core Left	-23%

Deferential Conservatives: January 24 — 15%, June 13 — 14%
Populist Conservatives: January 24 — 13%, June 13 — 7%
Business Liberals: January 24 — 19%, June 13 — 19%
Left Liberals: January 24 — 32%, June 13 — 20%
Thrifty Moderates: January 24 — 29%, June 13 — 22%
Core Left: January 24 — 53%, June 13 — 30%

■ January 24   ■ June 13

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Several elements of the Liberal campaign had crossover appeal to NDP voters

Q Did the following things make you more or less likely to vote for Kathleen Wynne and the Ontario Liberal Party?

	Vote OLP	Vote OPC	Vote ONDP	Vote Ontario Green
Your local Ontario Liberal Party candidate	40%	-34%	-13%	-19%
The budget they tabled before the election	55%	-56%	-4%	-3%
Kathleen Wynne's performance during the election campaign	59%	-51%	-12%	-3%
The way Kathleen Wynne and the Ontario Liberal Party ran the government before the election	49%	-64%	-25%	-18%
The way that Dalton McGuinty ran the Liberal government before Kathleen Wynne became Premier	-21%	-76%	-53%	-46%
The possibility that the NDP and Liberal parties might split the vote in some ridings	44%	-28%	8%	0%

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Liberal and NDP voters were equally opposed to the PC platform; PC voters were most excited by local candidates

Q Did the following things make you more or less likely to vote for Tim Hudak and the Ontario PC Party?

	Vote OLP	Vote OPC	Vote ONDP	Vote Ontario Green
Your local Ontario PC Party candidate	-32%	55%	-31%	-27%
The PC's Million Jobs Plan	-66%	37%	-63%	-53%
The PC's record from their last term in office in the 1990s when Mike Harris was Premier	-66%	31%	-59%	-55%
The Ontario PC Party's plan to reduce the size of the public service by cutting 100,000 jobs	-74%	44%	-66%	-57%
Tim Hudak's performance in the election campaign	-64%	41%	-56%	-33%

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The NDP decision to defeat the budget was an important mark against them among many who voted Liberal instead

Q Did the following things make you more or less likely to vote for Andrea Horwath and the Ontario NDP?

	Vote OLP	Vote OPC	Vote ONDP	Vote Ontario Green
Your local Ontario NDP candidate	-8%	-18%	55%	-23%
The NDP's platform in this campaign	-20%	-15%	47%	-17%
Andrea Horwath's performance during the election campaign	-12%	4%	51%	-29%
The NDP's decision to defeat the budget and force an election	-51%	0%	15%	-39%
The NDP focus on pocketbook issues like reducing auto insurance and electricity bills	7%	12%	69%	15%
The possibility that the NDP and Liberal parties might split the vote in some ridings	-18%	-14%	20%	-20%

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Even those who "somewhat agree" were still most likely to vote Liberal

Q For each of the following statements please indicate if you agree or disagree.
[asked of all respondents]

"It's time for a change in the Ontario government."

	Strongly agree	Somewhat agree	Neither	Somewhat disagree	Strongly disagree
PC	52%	25%	10%	4%	1%
Liberal	13%	45%	62%	78%	87%
NDP	24%	22%	14%	16%	4%
Green	8%	5%	12%	2%	8%
Total	100%	100%	100%	100%	100%

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Compared to a neutral view, fear of Hudak doubled the Liberal vote but only increased NDP vote by 7 points

Q For each of the following statements please indicate if you agree or disagree.
[asked of all respondents]

"I am afraid of what Tim Hudak and the PCs might do if they form government."

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	2%	18%	36%	75%	93%
Liberal	63%	49%	33%	6%	3%
NDP	25%	23%	18%	11%	1%
Green	10%	9%	9%	2%	2%
Total	100%	100%	100%	100%	100%

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As expected, this is a strong predictor of Liberal vote

Q For each of the following statements please indicate if you agree or disagree.
[asked of all respondents]

"This election is really a two-horse race, only the Liberals and the Conservatives have a real chance of forming government."

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	35%	27%	32%	27%	16%
Liberal	47%	45%	41%	40%	30%
NDP	7%	19%	20%	22%	45%
Green	9%	7%	5%	10%	8%
Total	100%	100%	100%	100%	100%

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This attitude strongly correlated with voting for the Liberals

Q For each of the following statements please indicate if you agree or disagree.
[asked of all respondents]

"I like Andrea Horwath and the NDP, but I'm worried that voting for them will only help Tim Hudak and the PCs win the election."

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	9%	8%	29%	26%	56%
Liberal	70%	65%	39%	40%	19%
NDP	14%	21%	22%	22%	13%
Green	6%	5%	7%	10%	11%
Total	100%	100%	100%	100%	100%

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Those who agreed but still voted for the Liberals or PCs were almost twice as likely to default to the Liberals
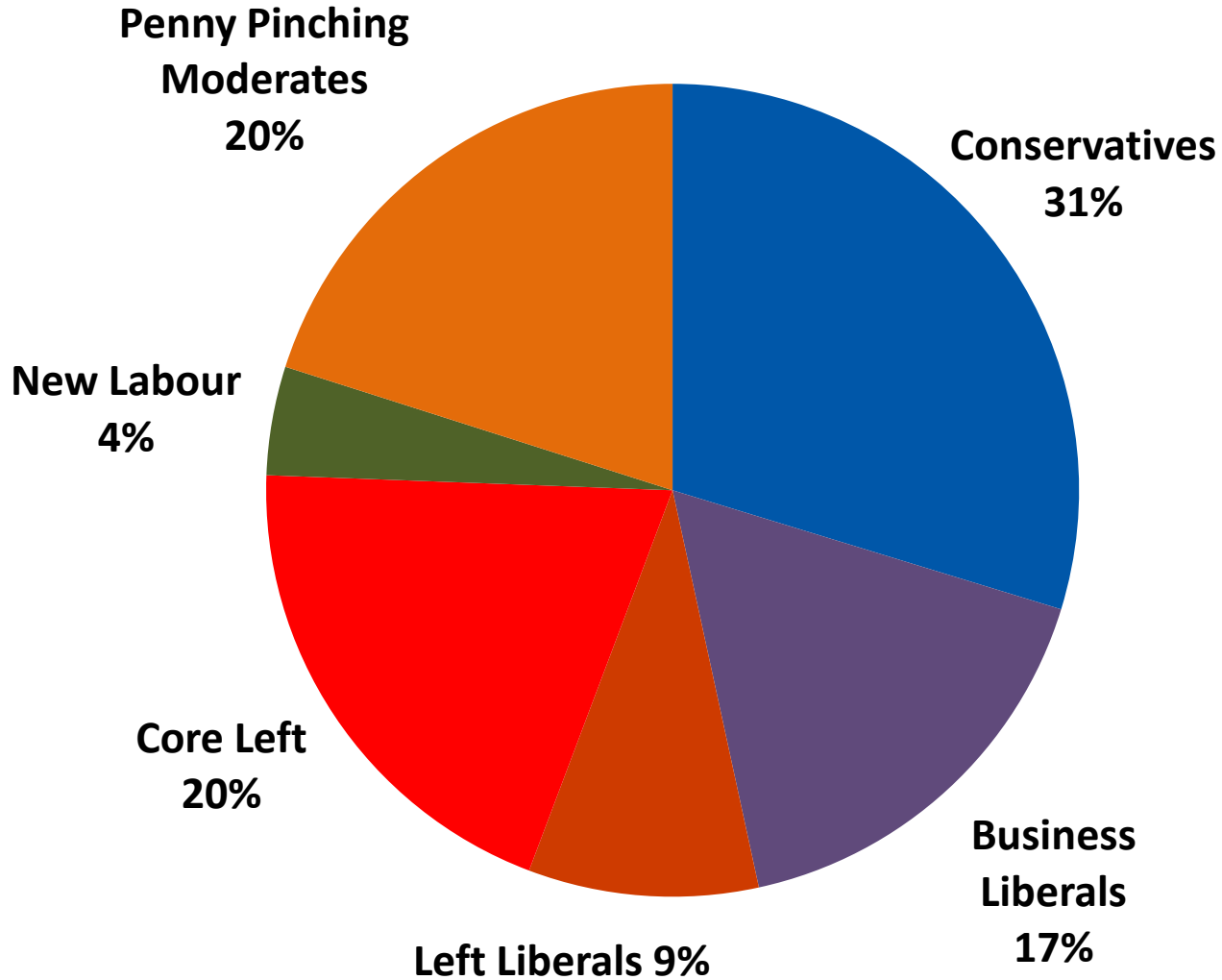
Q For each of the following statements please indicate if you agree or disagree.
[asked of all respondents]

"I am tired of the Liberals and PC Party, its time to give the NDP a chance to show what they can do."

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	10%	19%	25%	32%	44%
Liberal	23%	37%	52%	57%	44%
NDP	60%	32%	15%	3%	1%
Green	6%	12%	6%	6%	8%
Total	100%	100%	100%	100%	100%

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Is the Party Over For the PCs and NDP?

Value Clusters

Penny Pinching Moderates 20%

Conservatives 31%

New Labour 4%

Core Left 20%

Left Liberals 9%

Business Liberals 17%

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Clusters by Attitude

	Conservatives	Business Liberals	Left Liberals	Core Left	New Labour	Penny Pinching Moderates
It is important for the government to: **Create opportunities so everyone can compete**	98%	88%	75%	0%	0%	28%
Do you think the profit system: **Brings out the worst in human nature**	0%	0%	100%	84%	0%	54%
When gov'ts make decisions on spending on programs, do you think they should base their decisions on: **Their ability to afford the programs**	94%	0%	0%	0%	0%	77%

PCs drew primarily from Conservatives, Liberals well ahead of NDP among most left groups

Q If a provincial election were held today, which party would you vote for?… In that case, which party's candidate do you lean toward slightly? [**Vote + Lean**]

[asked of all respondents]

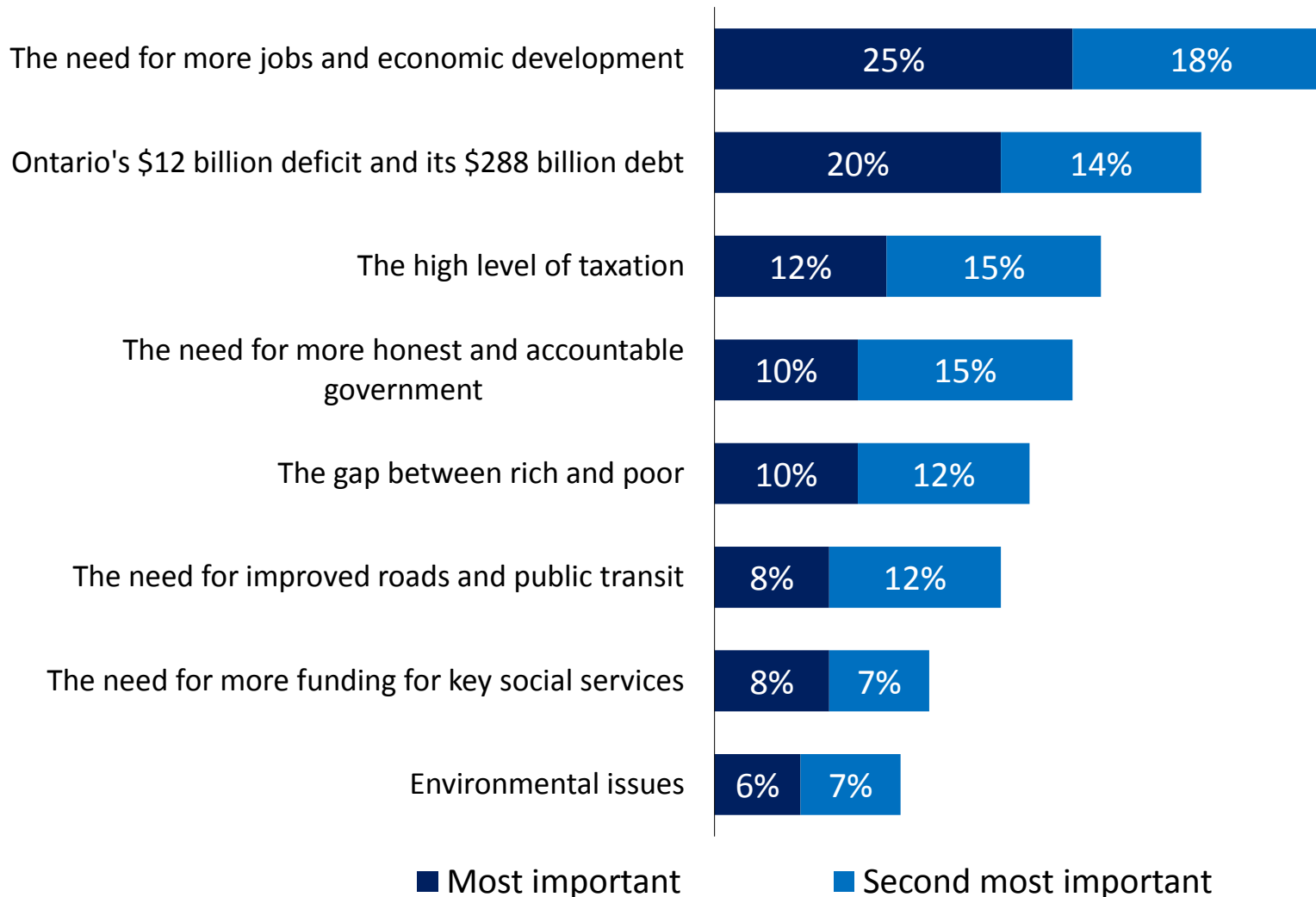|	Conser-vative	Business Liberal	Left Liberal	Core Left	New Labour	Penny Pinching Moderates	Total
PC	62%	19%	10%	5%	18%	19%	28%
Liberal	17%	39%	46%	52%	46%	27%	33%
NDP	7%	16%	17%	30%	20%	20%	17%
Green	2%	5%	8%	4%	6%	11%	6%
Unaligned	12%	20%	19%	9%	9%	24%	16%

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What Now for the Liberals?

The Honeymoon is still on

- 64% say the province is on the right track

- 58% are satisfied with the performance of the provincial government

- RSH impact is 2 to 1 positive

- Just 15% believe their policies and programs are fundamentally wrong

- The Liberals retain a 7 point lead in Voter ID

- The Liberals enjoy a 14 point lead in decided vote (44% Lib, 30% PC, 18% NDP)

- But …

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The issue matrix is challenging for Liberals

Q Looking again at these issues, which is the most important issue to you in this election? And which is the next most important?

Issue	Most important	Second most important
The need for more jobs and economic development	25%	18%
Ontario's $12 billion deficit and its $288 billion debt	20%	14%
The high level of taxation	12%	15%
The need for more honest and accountable government	10%	15%
The gap between rich and poor	10%	12%
The need for improved roads and public transit	8%	12%
The need for more funding for key social services	8%	7%
Environmental issues	6%	7%

■ Most important ■ Second most important

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Approach to the Economy

Q Thinking about the role of the provincial government when it comes to the economy, which statement is closest to your point of view?
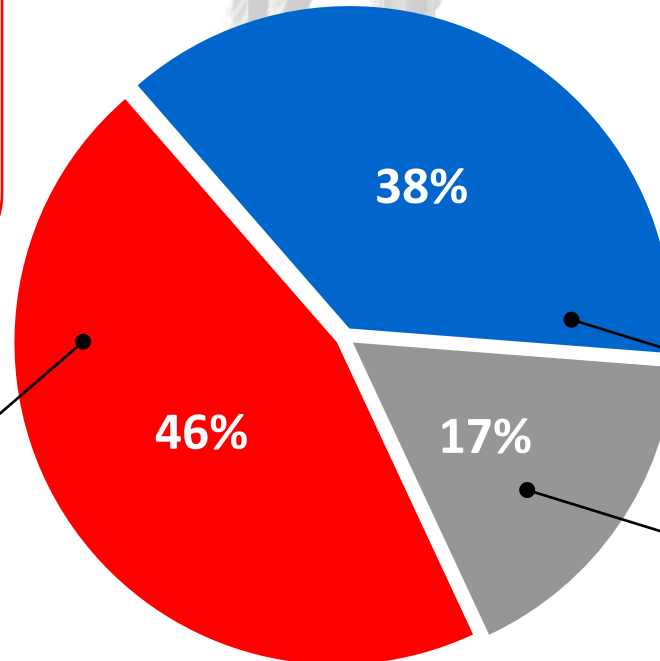
Smith says:

"Government needs to be an active partner to help businesses from this province compete in the world with incentives to encourage research and development, training programs and other initiatives to support high potential industries."

Jones says:

"Government helps business the best by reducing taxes and red tape and staying out of the way, not by trying to pick winners with taxpayers' money"

38%

46%

17%

38% Agree with Jones

12% Don't Know

46% Agree with Smith

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Approach to the Budget

Q In developing its annual budget, it is more important for the provincial government to …

Smith says:

"Increase spending to provide more and better services to residents of this province."

Jones says:

"Hold the line on the growth of government spending in order to reduce taxes and pay down the province's debt."

60%

25%

15%

25% Agree with Smith

60% Agree with Jones

12% Don't Know
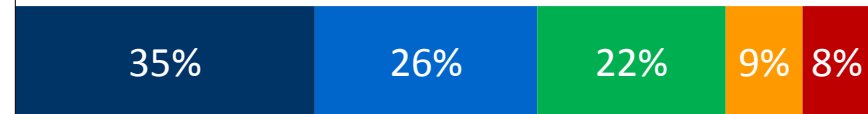
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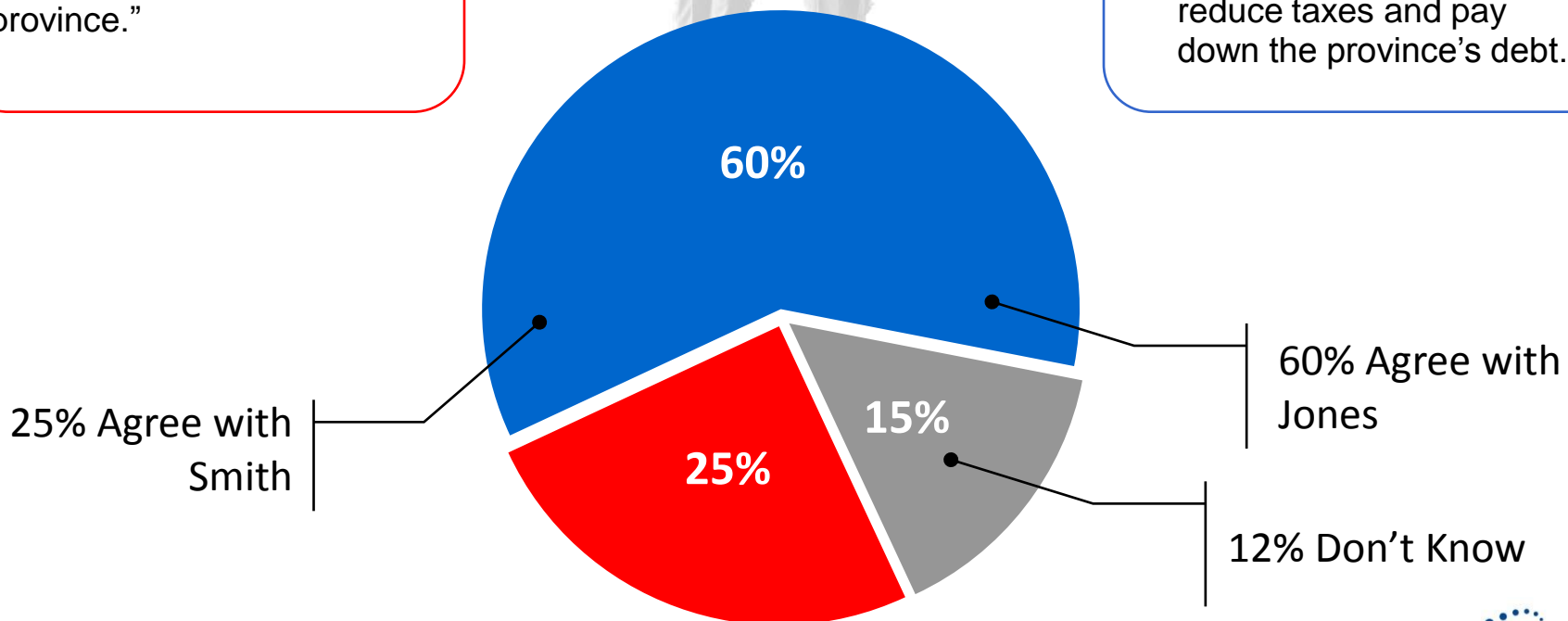
Public sector unions vulnerable as government seeks to balance budget

Q For each of the following statements please indicate if you agree or disagree.

A lot of government workers are paid better than private sector workers but don't have to work as hard

Strongly agree	Somewhat agree	Neither agree nor disagree/DK	Somewhat disagree	Strongly disagree
35%	26%	22%	9%	8%

Unreasonable demands of public sector unions are a big part of the provincial governments financial problems

Strongly agree	Somewhat agree	Neither agree nor disagree/DK	Somewhat disagree	Strongly disagree
25%	21%	33%	14%	7%

Public sector woporkers deliver critical social services, it is unfair to make them bear the burden of balancing the budget

Strongly agree	Somewhat agree	Neither agree nor disagree/DK	Somewhat disagree	Strongly disagree
16%	27%	33%	14%	11%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree/DK ■ Somewhat disagree ■ Strongly disagree

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Best public sector defense is a strong offense

Q For each of the following statements please indicate if you agree or disagree.

We have a pressing social deficit in this province that is measured by problems such as homelessness, waiting lists for health care and lack of access to post-secondary education.
- 23% | 34% | 28% | 9% | 7%

The reason we have a deficit is because the rich and big business are not paying their fair share.
- 26% | 32% | 21% | 12% | 9%
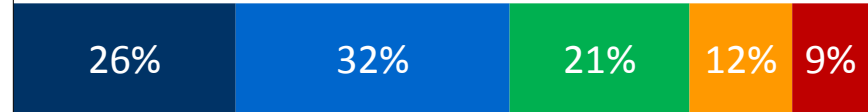
We collect more than enough taxes in this province to have good health, education and social services, we just have to spend it better.
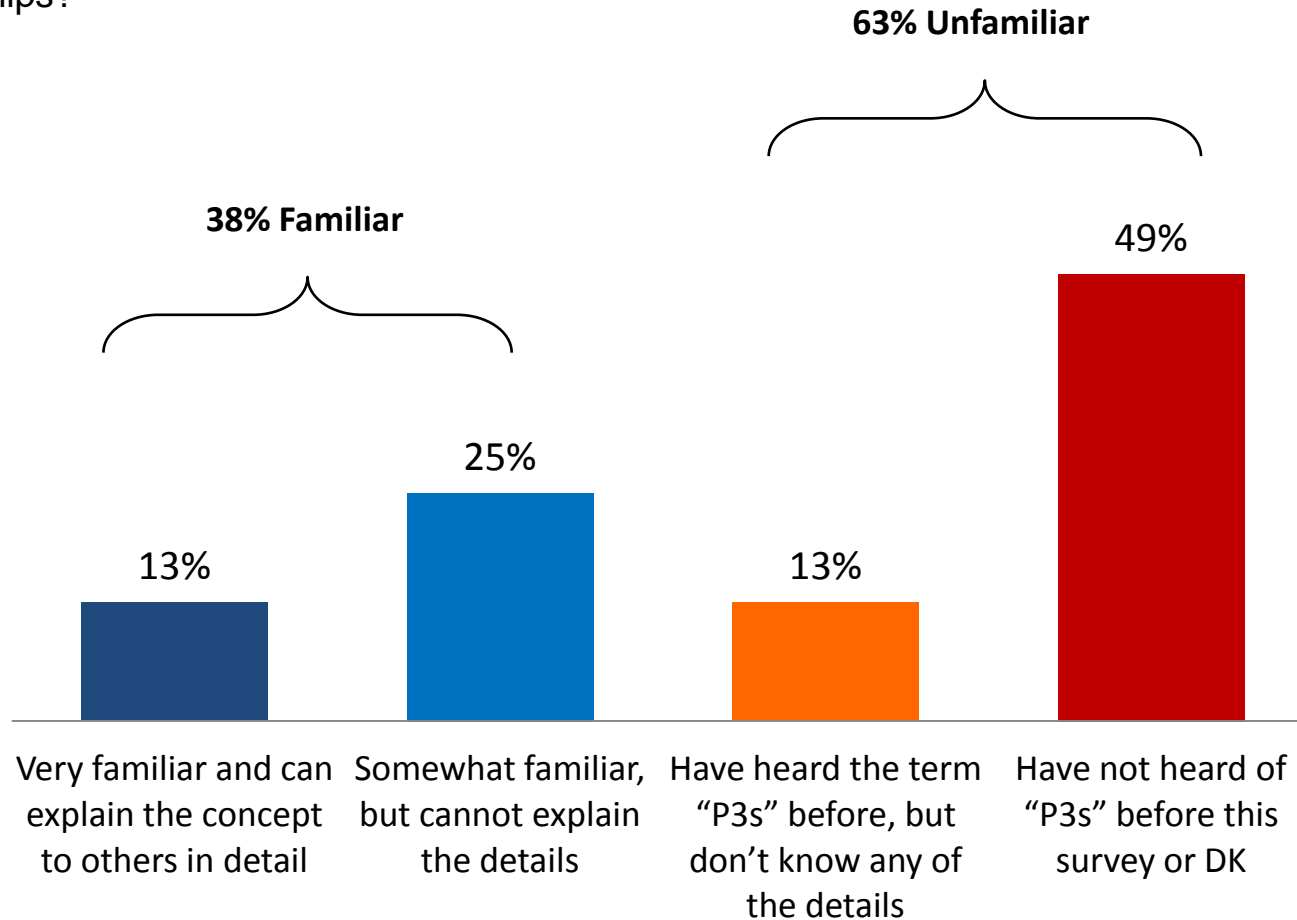- 39% | 33% | 19% | 7% | 2%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree/DK ■ Somewhat disagree ■ Strongly disagree

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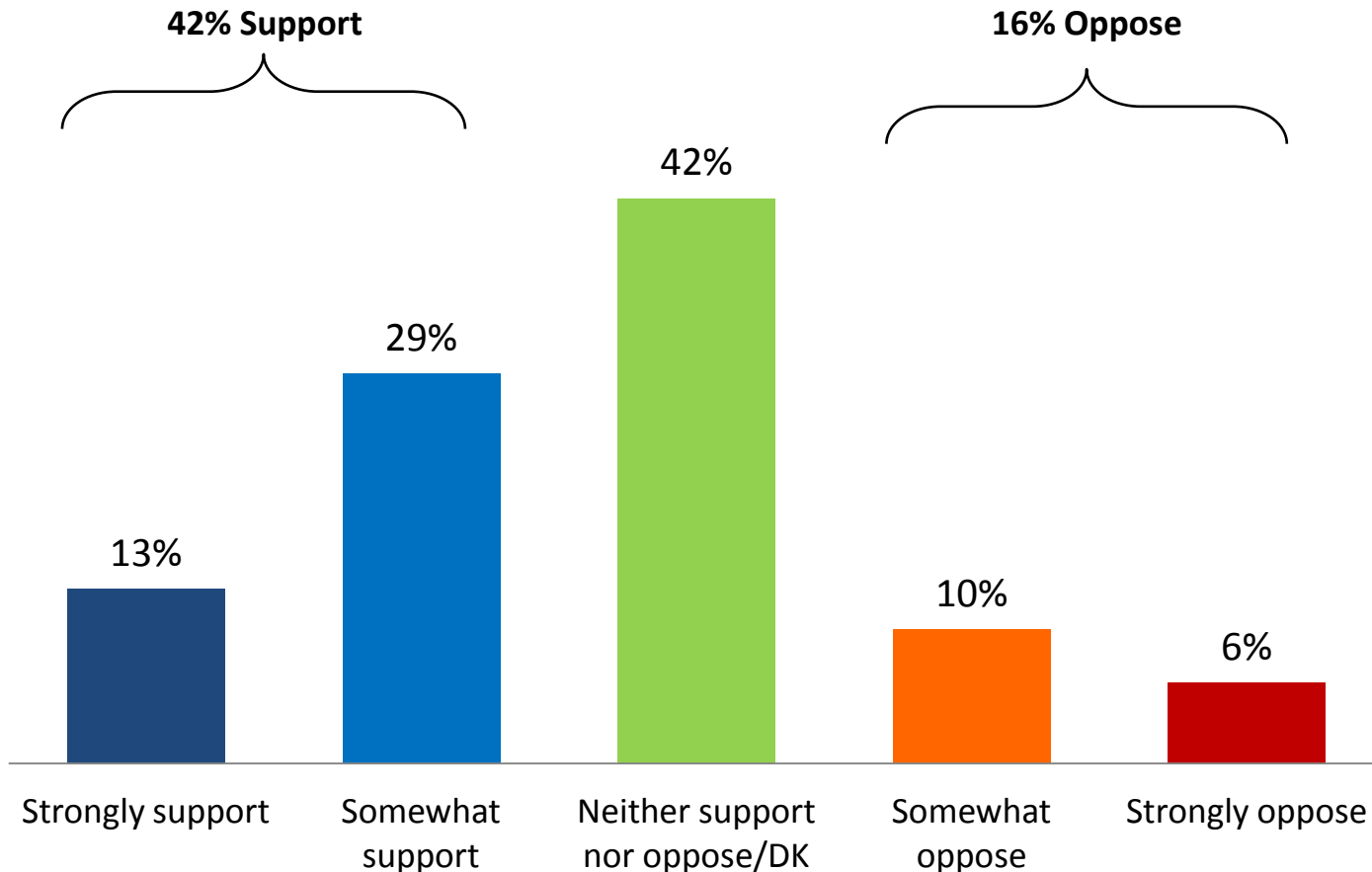
P3 Familiarity: 63% unfamiliar with P3s

Q One option to help fund public transit system and road and highway upgrades is a concept called "Public-Private Partnerships", "PPP" or "P3s". How familiar are you with the concept of public-private partnerships?

63% Unfamiliar

38% Familiar

13%	25%	13%	49%
Very familiar and can explain the concept to others in detail	Somewhat familiar, but cannot explain the details	Have heard the term "P3s" before, but don't know any of the details	Have not heard of "P3s" before this survey or DK

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P3 Support: Tentative support, great uncertainty

Q As you may know, public-private partnerships are projects that involve the private sector in delivering what are typically considered government services. Do you support or oppose the general idea of increasing the involvement of the private sector in the delivery of government services, such as roads and public transit?

42% Support

16% Oppose

13%	29%	42%	10%	6%
Strongly support	Somewhat support	Neither support nor oppose/DK	Somewhat oppose	Strongly oppose

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Pulling It All Together

1. The Liberal edge on brand loyalty is hard to overcome.

2. The Liberals executed the better the campaign while each of the Tories and the NDP made a key strategic error that played into the Liberal campaign plan.

3. The NDP plan was half right – they did add new people to their base, but the new recruits simply replaced core supporters lost to the Liberals.

4. The Tories must reach out beyond the Conservative party loyalists. They didn't even rally all the conservative value clusters. There is much broader support for conservative attitudes and policies than there is for the PC party today.

5. The government's fiscal challenge creates both NDP and Conservative opportunities to rebuild.

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