

Public Opinion Research

Energy in Transition

Ontario Energy Network

Toronto | June 15, 2018

Methodology:



These are the results of several surveys that were conducted prior to and during the campaign, as well as immediately following the Ontario election.



While most of the results come from a series of online surveys, where appropriate we have also included the results of our ongoing monthly telephone surveys of 600 Ontario adults.

In all of these surveys, respondents are adult (18+) residents of Ontario who are eligible to vote. All samples are weighted by *age*, *region*, and *gender* to reflect the actual demographic composition of the adult population residing in Ontario [Statscan Census 2016].

Confidence

Please note that the Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels as they are not random probability samples.

The margin of error on our monthly telephone surveys is $\pm 4\%$, 19 times out of 20.



The Liberal Campaign

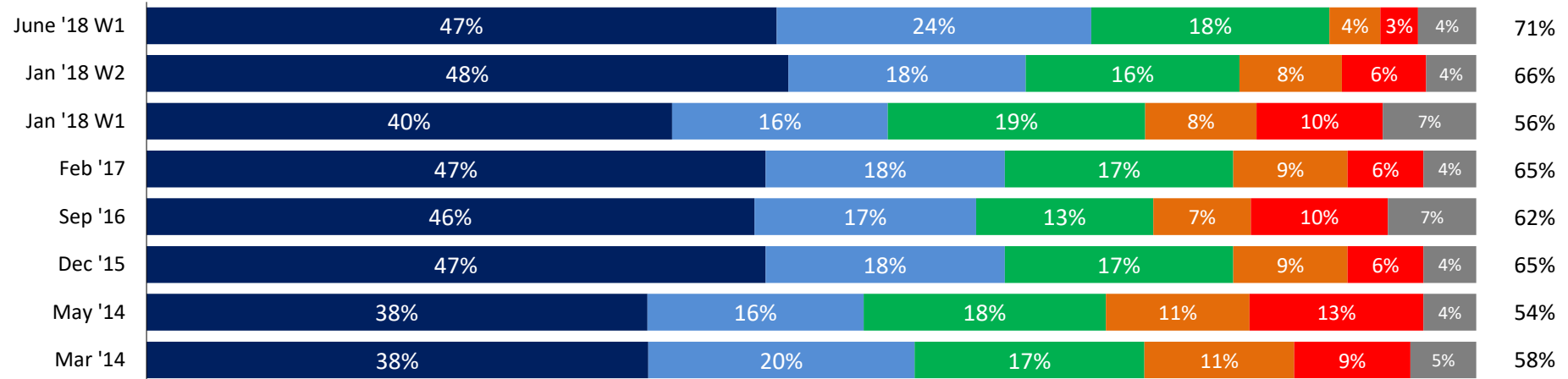
The Liberals were hoping the numbers would improve when they were compared against the alternatives vs the perfect



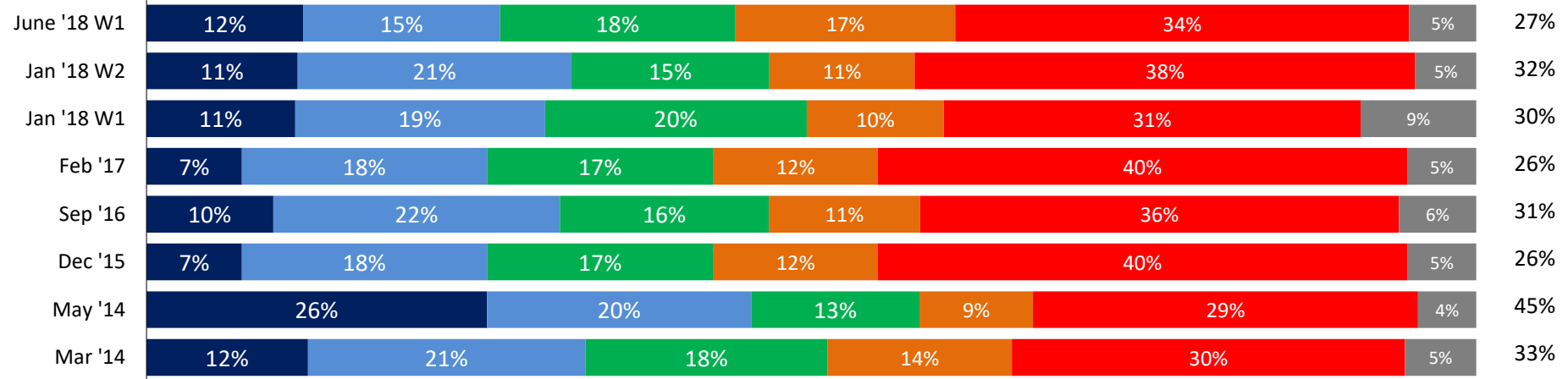
For each of the following statements please indicate if you agree or disagree?

**Total agree
(Strongly + Somewhat)**

It's time for a change in government here in Ontario



The Ontario Liberals have their problems, but they are still the best party to form government



Strongly agree
Somewhat disagree

Somewhat agree
Strongly disagree

Neither agree nor disagree
Don't know



There was some evidence for hope as late as last fall, but by the budget, the Liberals had lost any benefit of the doubt



Fair Hydro Plan (September 2017)

Ontario Energy Association

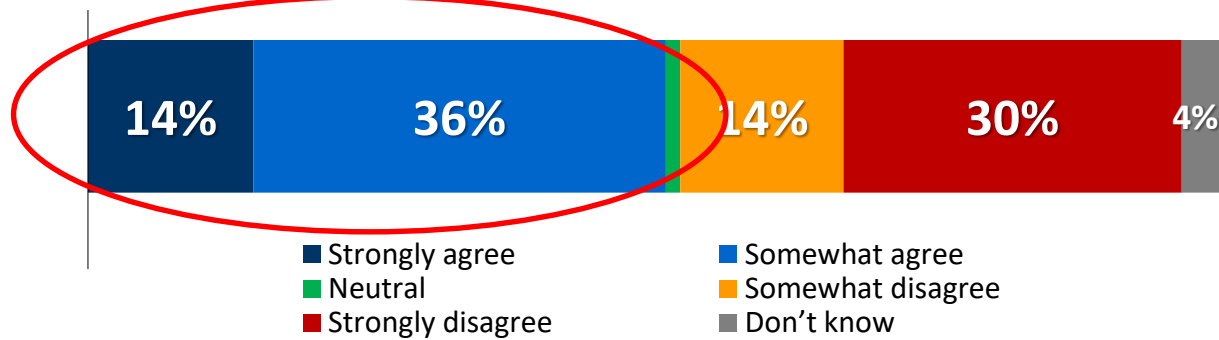


I am going to read you a series of statements. For each, please tell me if you strongly agree, somewhat agree, somewhat disagree or strongly disagree.

The Fair Hydro Plan seems like a desperate ploy from the Ontario government to save their chances in the upcoming election.



The Fair Hydro Plan seems like a genuine effort from the government to fix the problems that exist.

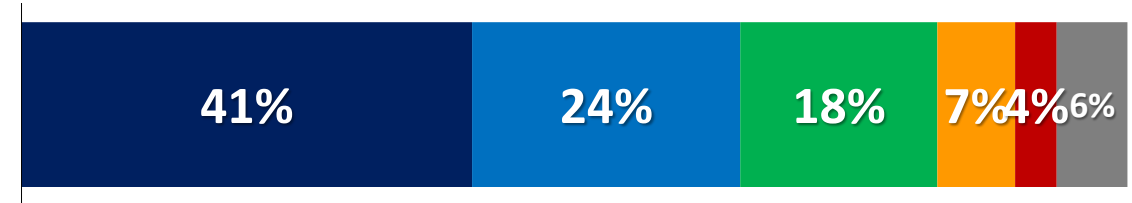


Ontario budget (April 2018)

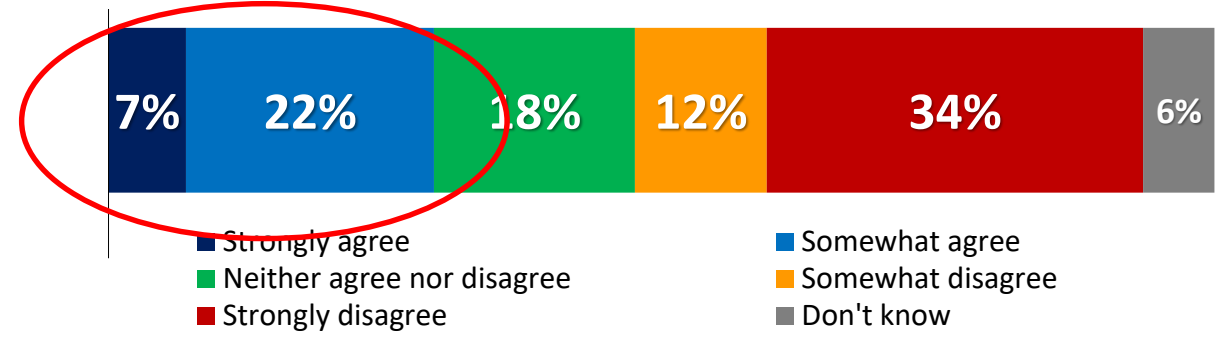


People have expressed various opinions about the new provincial budget. Please indicate whether you agree or disagree with the following statements.

The Ontario budget seems like a desperate ploy from the Ontario government to save their chances in the upcoming election.



The Ontario budget seems like a genuine effort from the government to fix the problems that exist.



Source: Fair Hydro Plan numbers are from the September 2017 Ontario This Month telephone omnibus. Budget numbers are from the April 2018 Canada This Month online omnibus



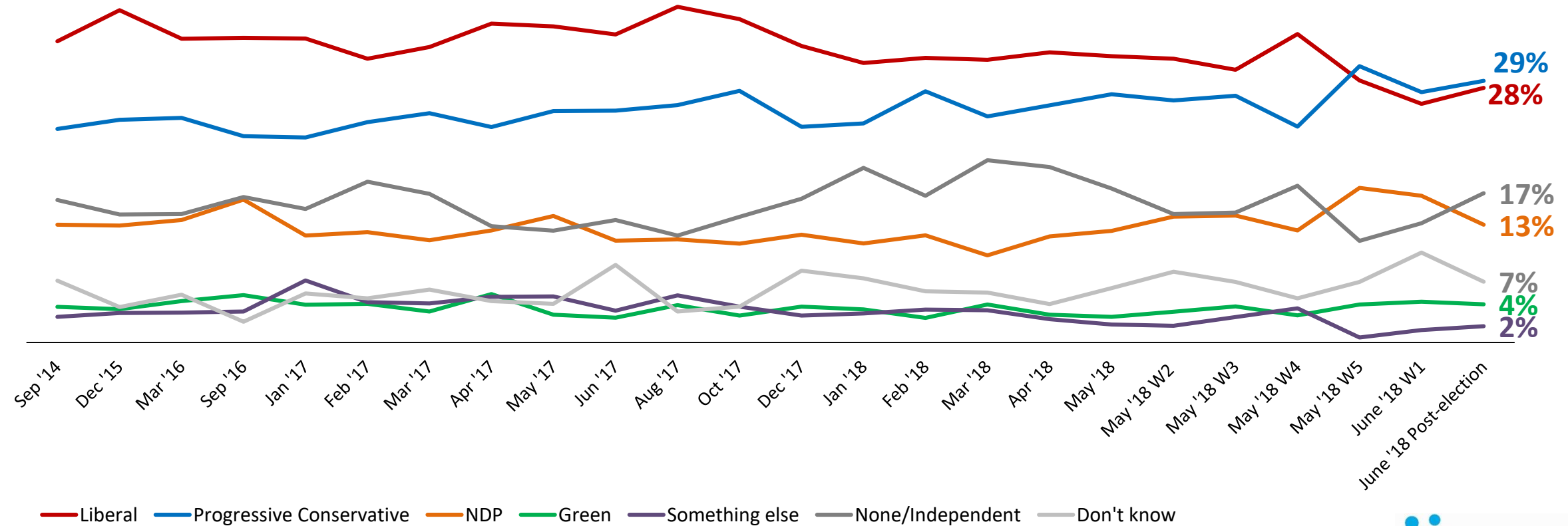
The NDP Campaign

It's not easy being orange ...



Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a...

[asked of all respondents]



For the NDP winning depends on clearly beating the PCs among the unaligned and a large number of Liberal defectors supporting them

2014 Vote by Party ID



And do you recall which party you voted for in the June 12th, 2014 Ontario provincial election? BY 2018 Party ID
[asked of respondents who voted in 2014]

2014 Vote

		Party ID				
Column %	PC	NDP	Liberal	Green/Other	Unaligned	
PC	80%	1%	4%	16%	25%	
NDP	6%	71%	5%	8%	21%	
Liberal	12%	23%	89%	30%	46%	
Green/Other	2%	4%	2%	46%	8%	



PC



NDP



Liberal



Green/
Other



Unaligned
(ID only)

2018 Vote by Party ID



Thinking about the choices available in your riding, which party's candidate did you vote for? BY 2018 Party ID
[asked of respondents who voted in 2018]

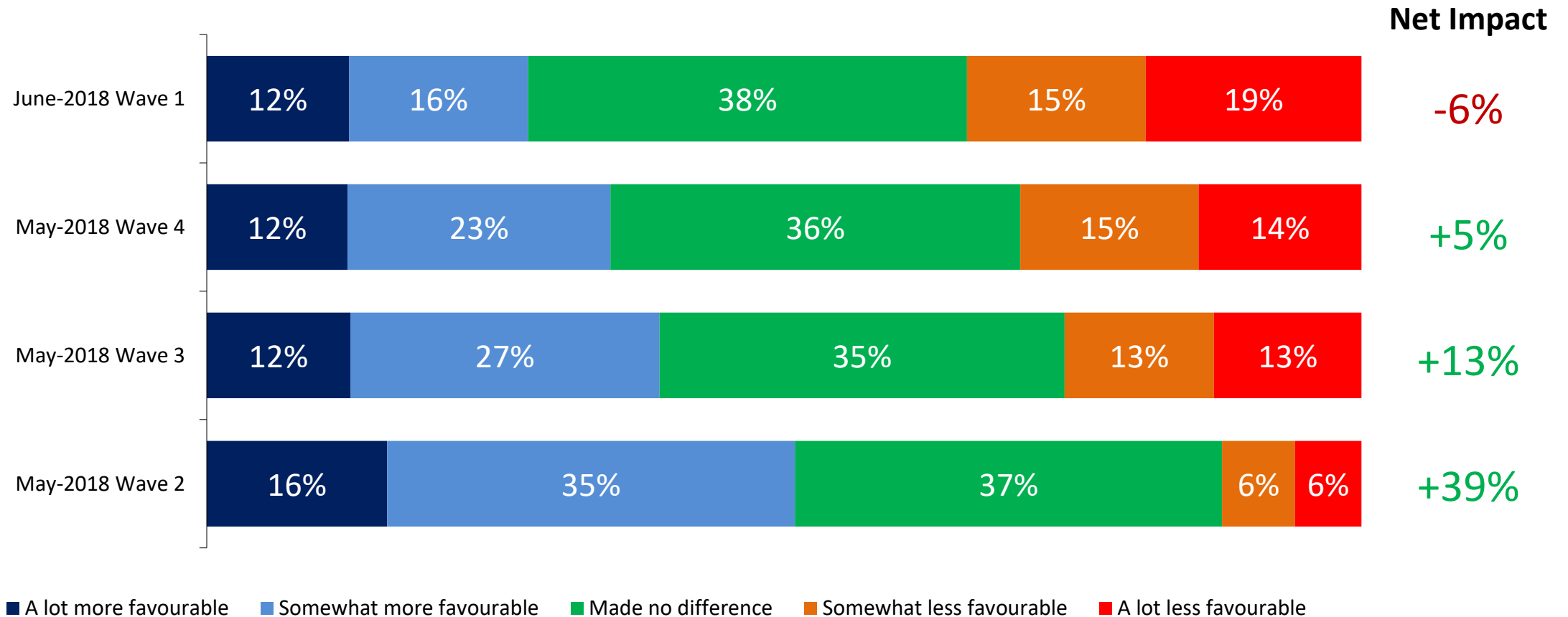
2018 Vote

		Party ID				
Column %	PC	NDP	Liberal	Green/Other	Unaligned	
PC	81%	3%	12%	20%	34%	
NDP	9%	90%	42%	26%	37%	
Liberal	6%	4%	43%	6%	15%	
Green/Other	4%	4%	4%	48%	14%	

Winds of public debate: Started high and positive but declined



Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards **Andrea Horwath and the Ontario NDP**, or did it make no difference?



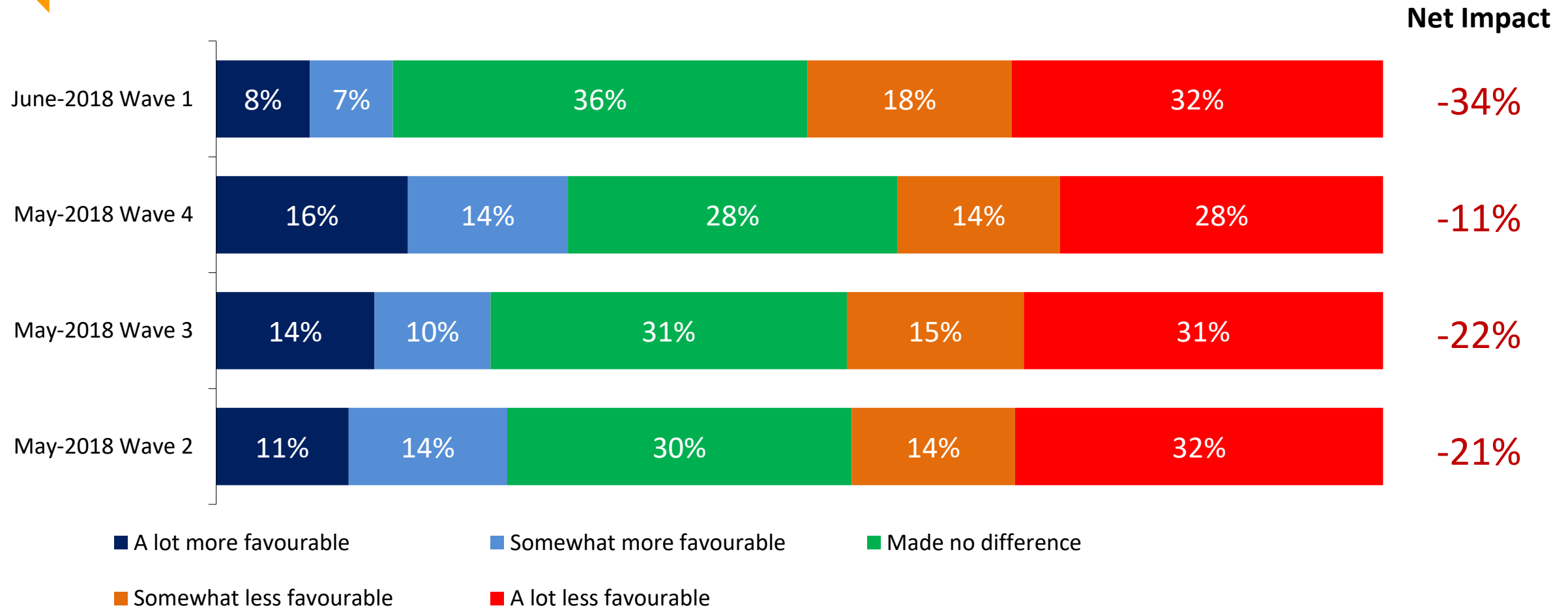


The PC Campaign

R/S/H: Winds of public debate were blowing against them

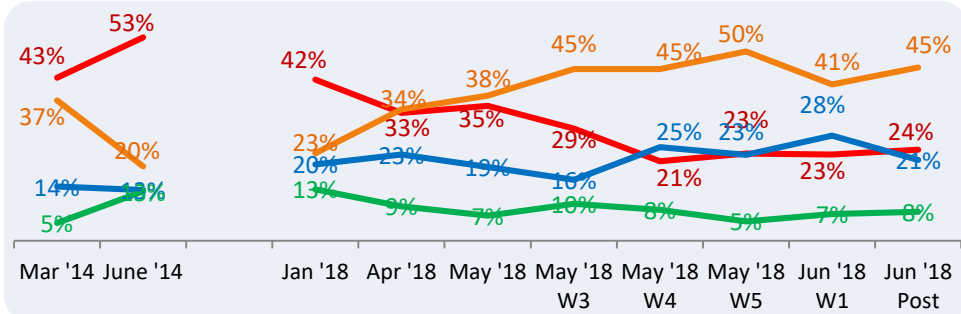
Q

Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards **Doug Ford and the Ontario PCs**, or did it make no difference?



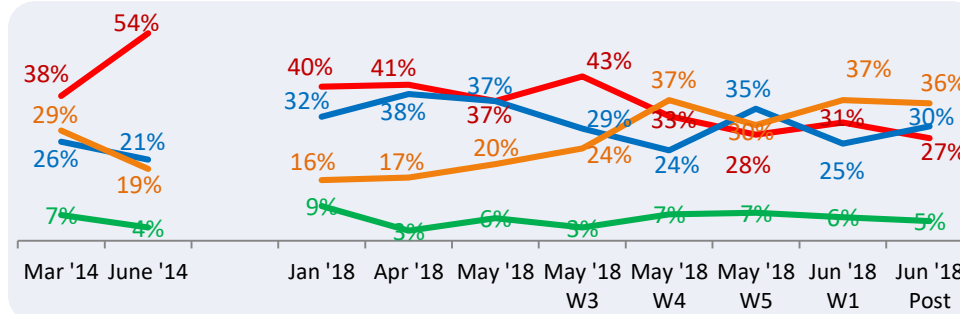
The PCs had to remain competitive among Business Liberals and Thrifty Moderates

Left Liberals



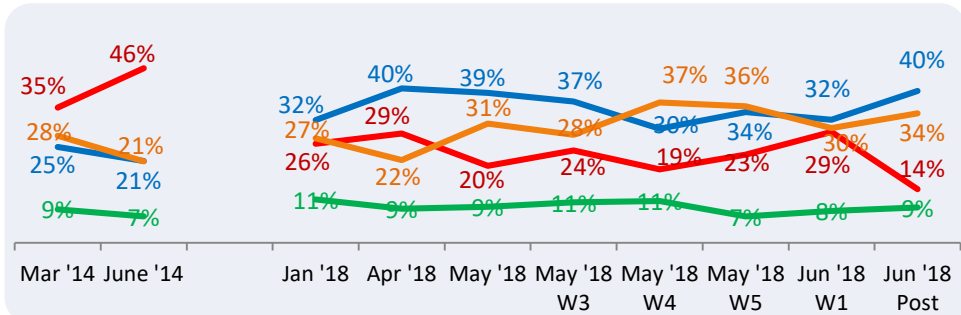
Final PC-NDP Margin **-24%**

Business Liberals



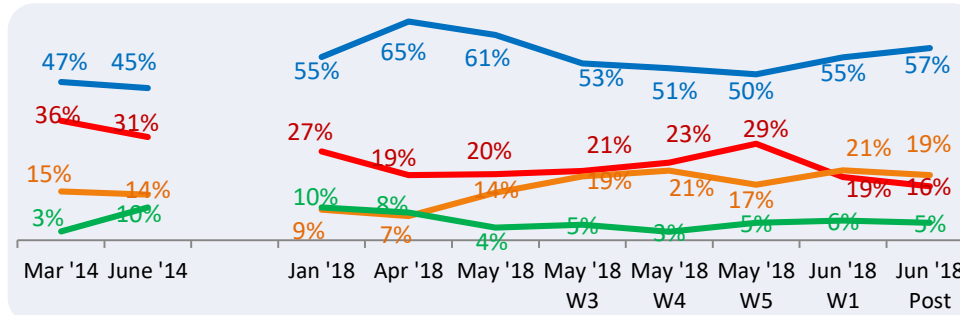
Final PC-NDP Margin **-6%**

Thrifty Moderates



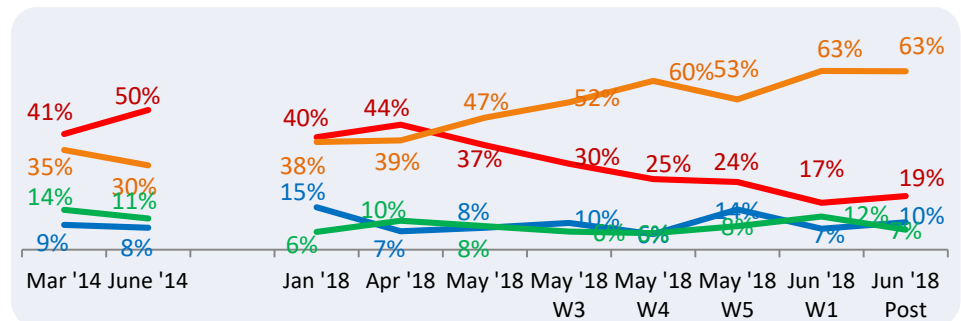
Final PC-NDP Margin **+6%**

Deferential Conservatives



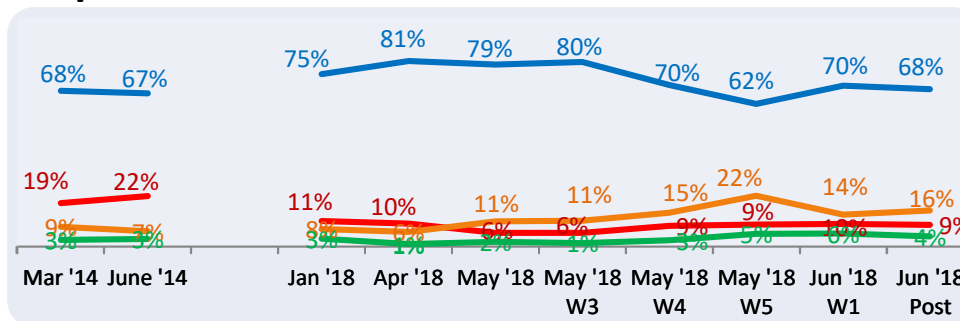
Final PC-NDP Margin **+38%**

Core Left



Final PC-NDP Margin **-54%**

Populist Conservatives

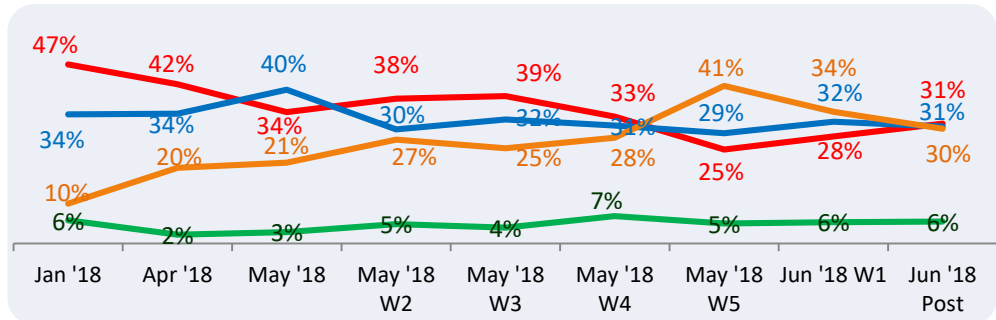


Final PC-NDP Margin **+53%**

Decided vote: Liberal PC NDP Green

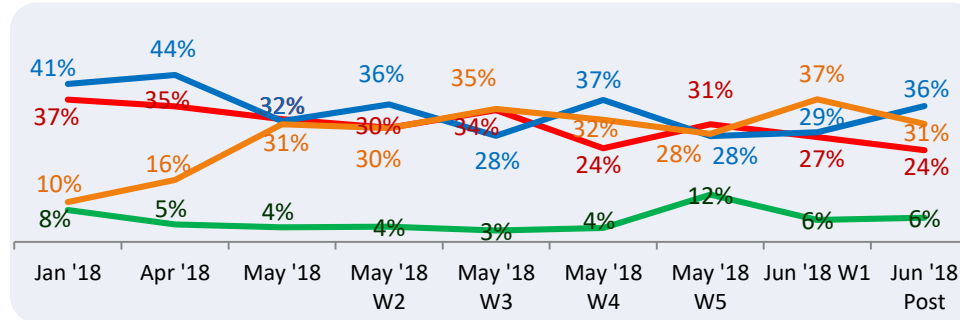
Holding the struggling middle groups was crucial to PC success in the face of a surging NDP

Canadian Dream Achievers



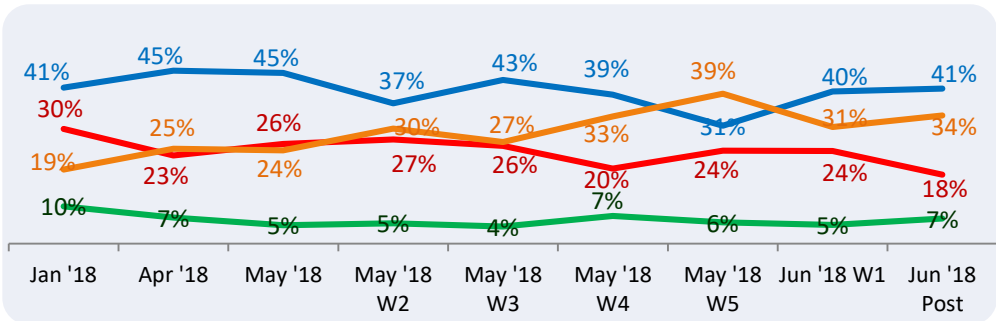
Final PC-NDP Margin **+1%**

Canadian Dream Hopefuls



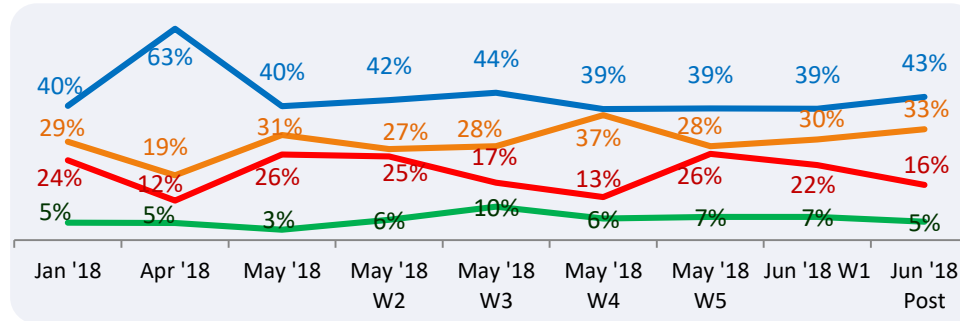
Final PC-NDP Margin **+5%**

Canadian Dream Moderate Strugglers



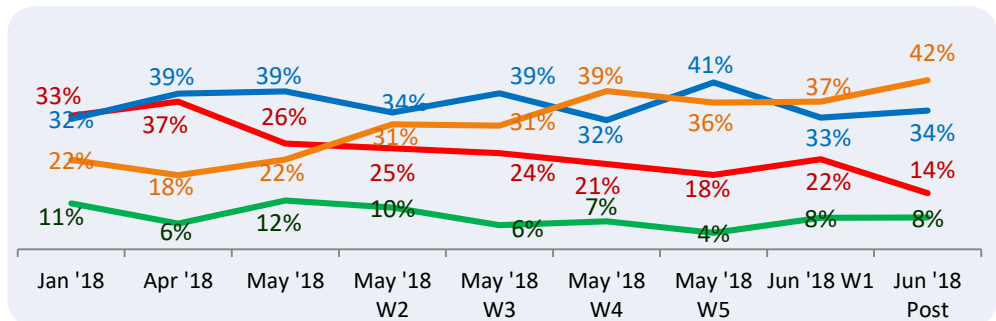
Final PC-NDP Margin **+7%**

Canadian Dream Heavy Strugglers



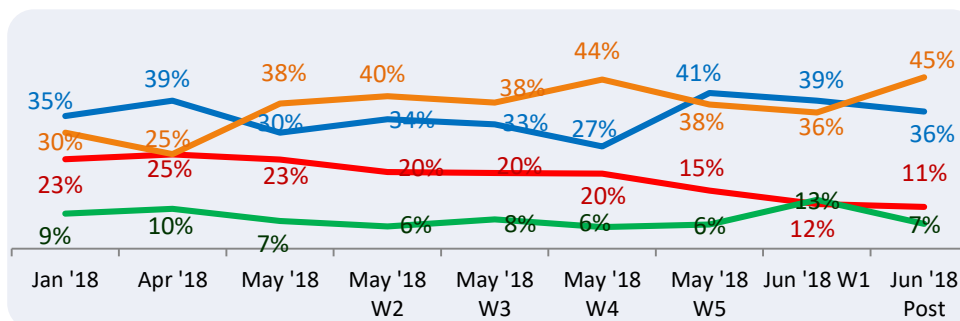
Final PC-NDP Margin **+10%**

Ambivalent



Final PC-NDP Margin **-8%**

Alienated



Final PC-NDP Margin **-9%**

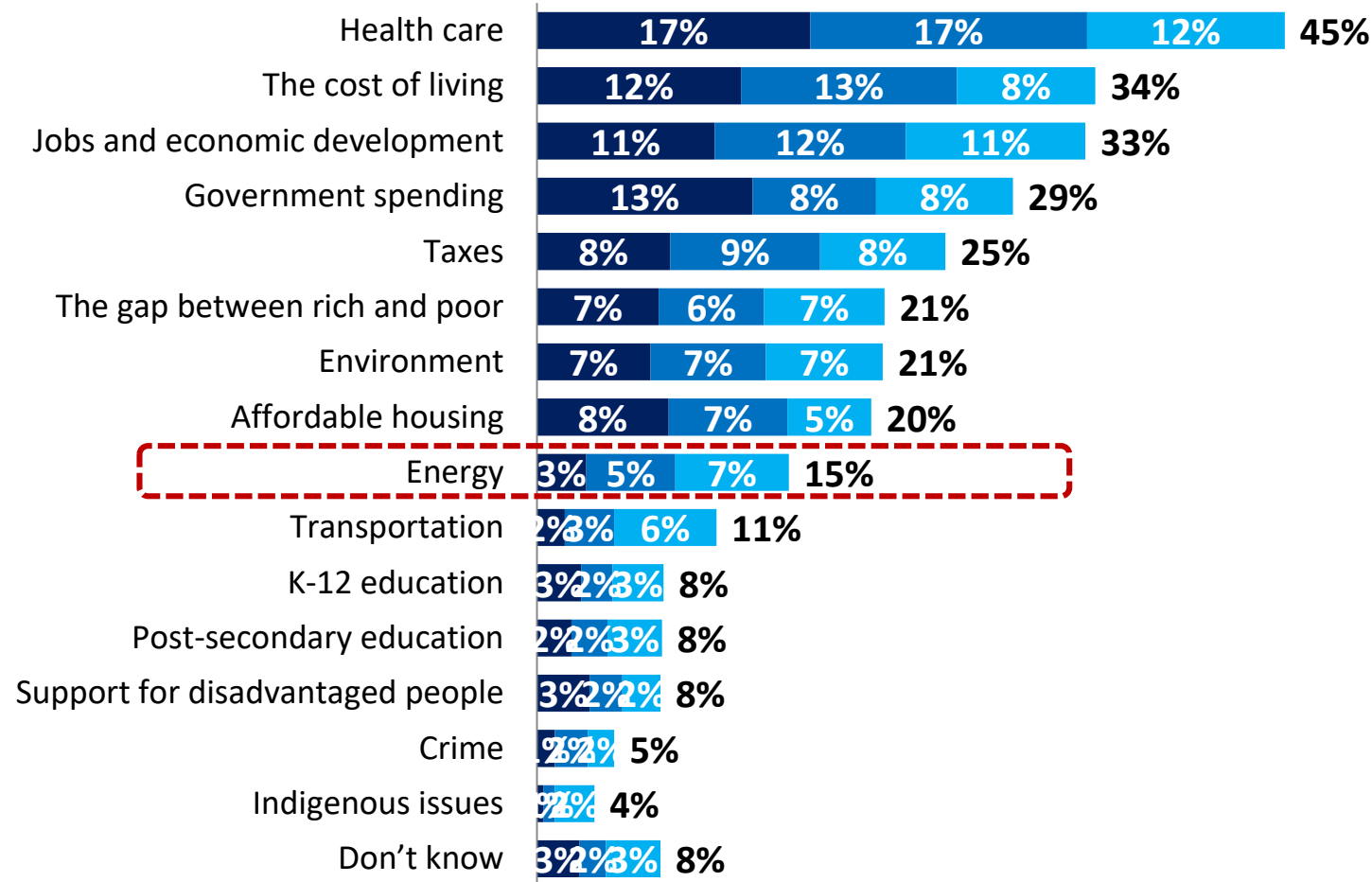
Decided vote: Liberal PC NDP Green

Connecting Energy and Politics

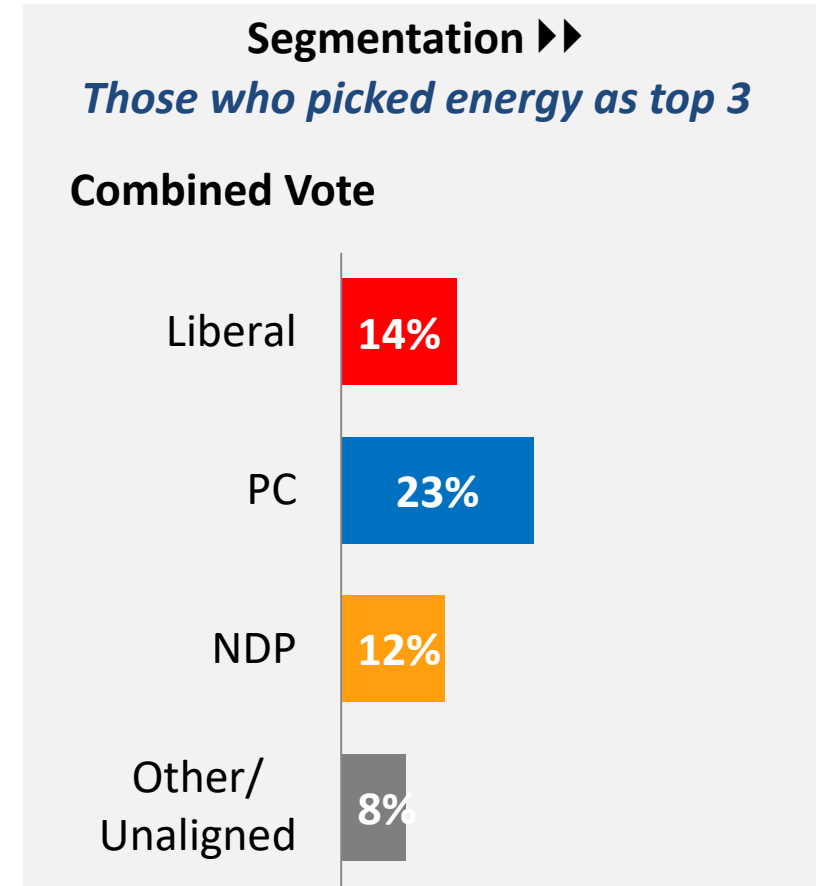
Energy as an Issue: Most of the issues tested are considered a higher priority than energy; PC voters much more concerned than others



Below is a list of issues that provincial governments are required to address. Of course, not every issue can be the government's top priority. Please indicate which of the following is the MOST important issue in Ontario?
[asked of all respondents; n=600]



■ Most Important ■ 2nd Most Important ■ 3rd Most Important

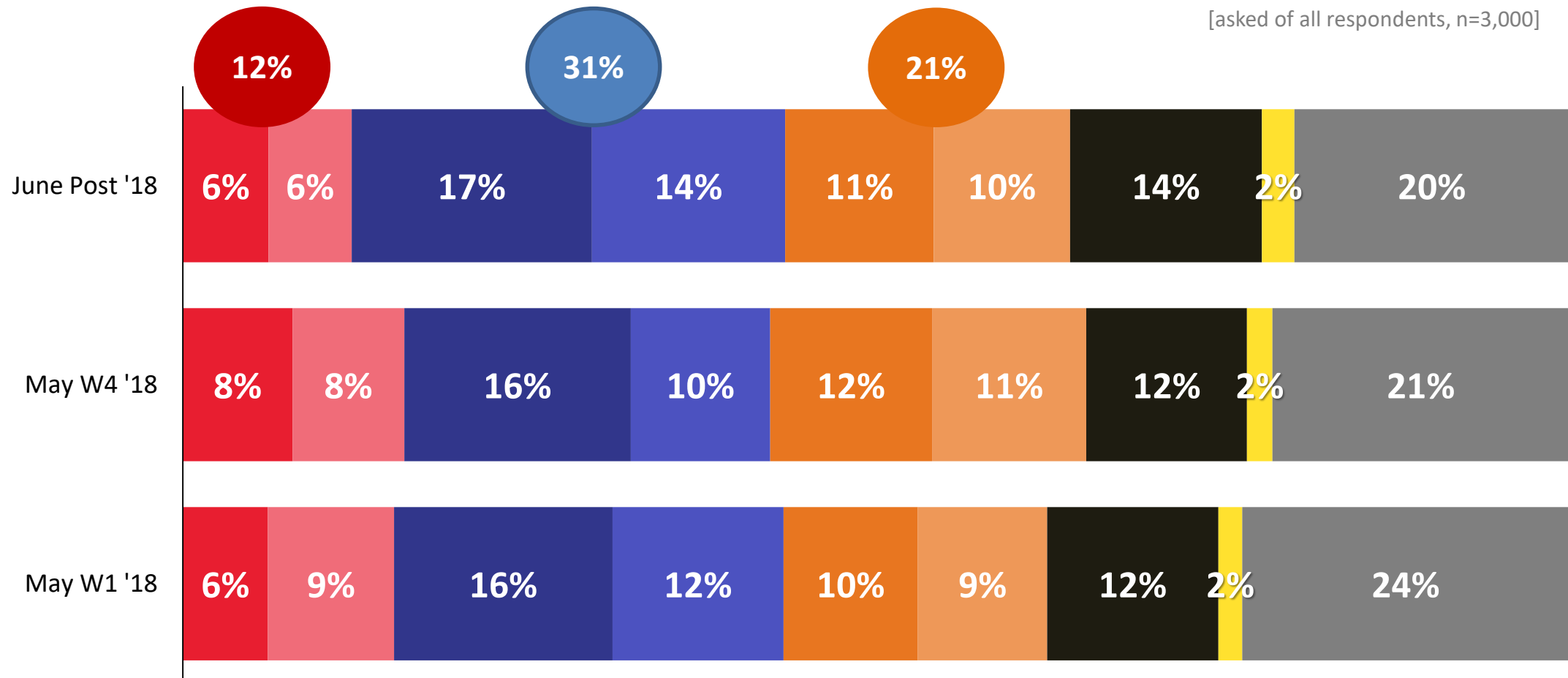


Party Performance on Energy: PCs and NDP made marginal gains on electricity post-election, at the expense of Liberals



Now we are going to provide you with a list of issues. For each of these issues, please indicate which party you think would do a much better job or a somewhat better job of dealing with that issue or if you think none of the parties would do a good job on that issue. How about [ENERGY]...?

[asked of all respondents, n=3,000]



■ Liberals much better

■ Liberals somewhat better

■ PCs much better

■ PCs somewhat better

■ NDP much better

■ NDP somewhat better

■ None

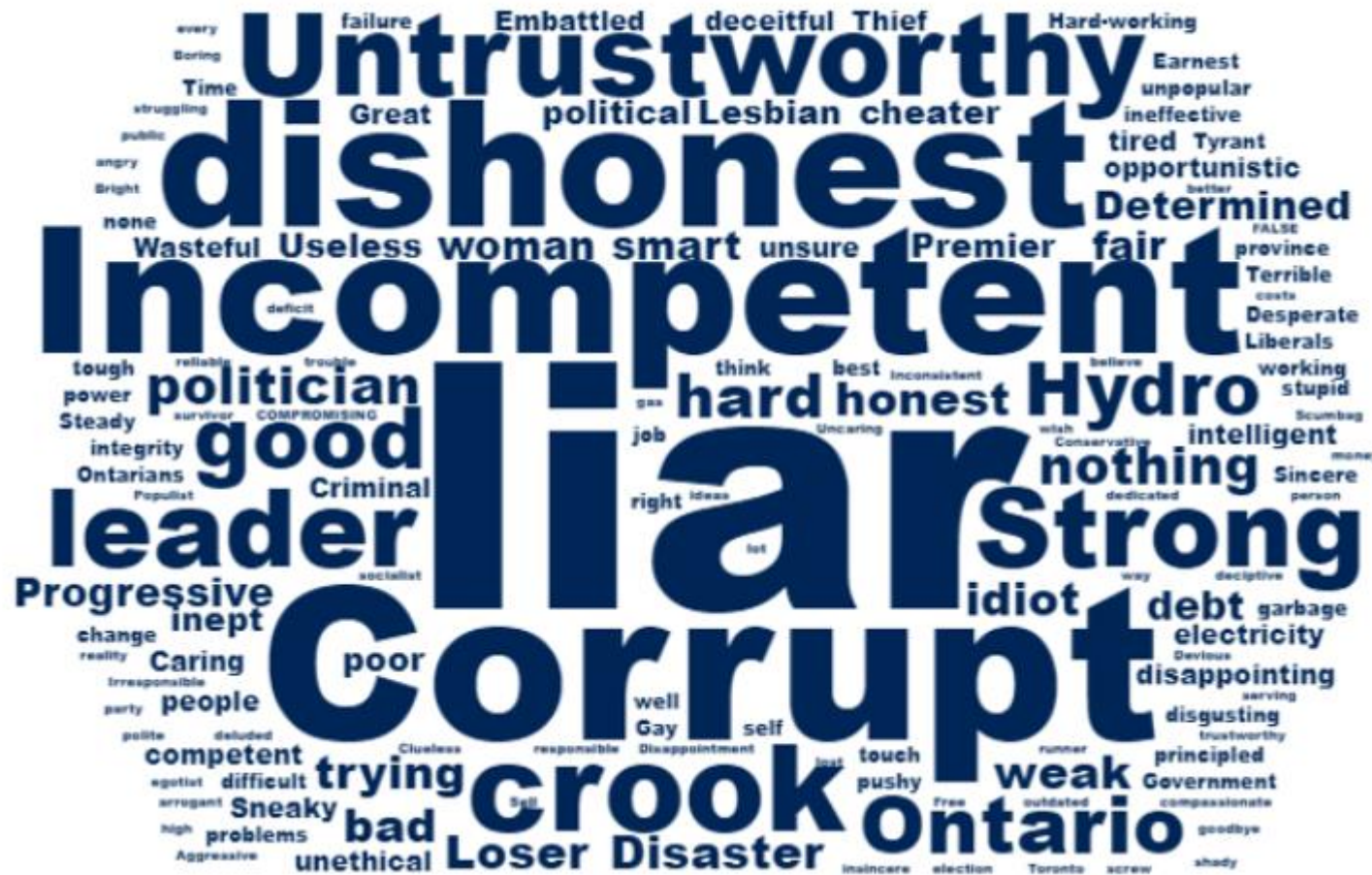
■ Other

■ Don't know

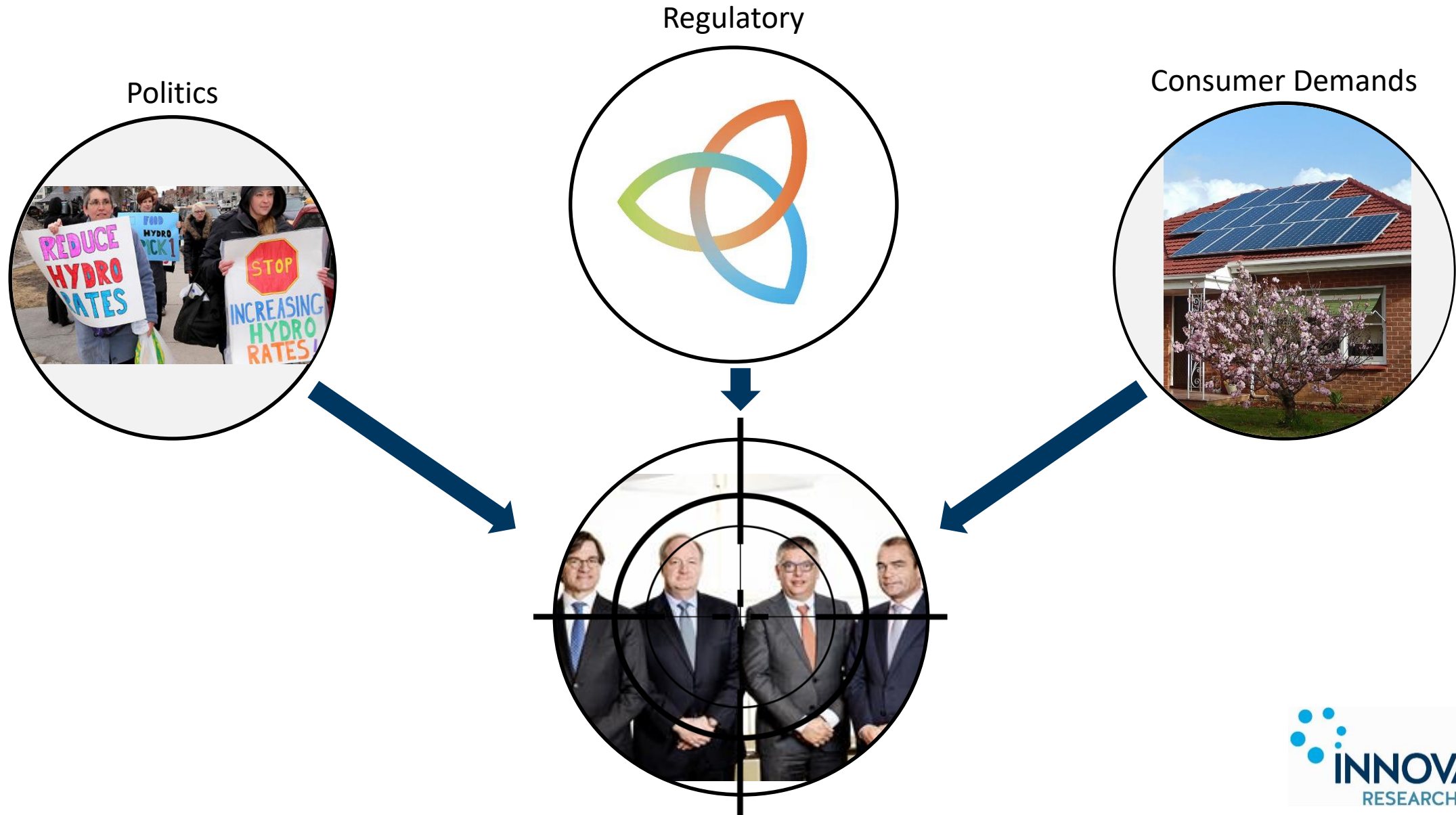
Biggest Impact of Energy was on Wynne's reputation



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]



Politics is not the only challenge facing the sector





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