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Ontario Political Landscape



Ontario 2014 Campaign



Overview

This presentation combines results from two surveys:

Ontario This Month Province Wide Telephone Survey

- An RDD land line sample of 500 Ontario households, conducted May 2nd to 6th, 2014.
- The sample has been weighted by age, gender and region using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population.
- After weighting a sample of this size, the aggregated results are considered accurate to within 4.4%, 19 times out of 20.

Canada This Month Province Wide Online Survey

- A representative online sample of 1,000 Ontario adults, conducted May 2nd to 6th, 2014.
- Weighted by age, gender and region using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population.
- Margin of error not applicable, online samples not random.

Unless otherwise noted, results are from the CTM Online survey.

Design

When the election was called, we had an online study ready to go to track reaction to the budget and we had a telephone study with a good set of political questions ready to go. We simply added a few more political attitude statements to the online study and otherwise used the studies as originally planned.

We have relied on the telephone study for our primary conclusions on vote and then the online study to provide in-depth analysis of various groups of voters.

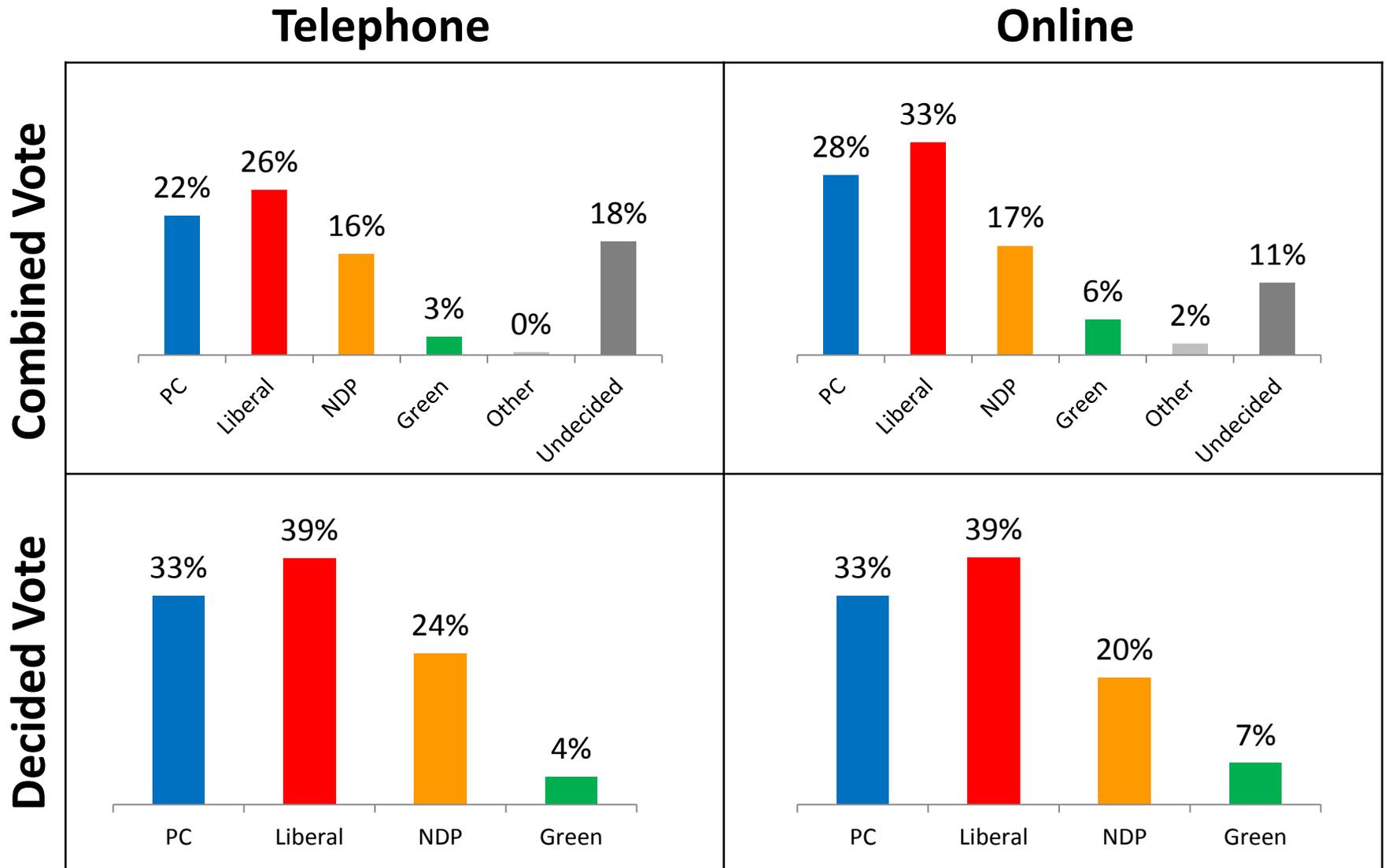
Telephone studies using RDD designs allow every voter to have a known probability of being selected. This is necessary to meet the key statistical assumptions required to assign a margin of error.

As it happens, after weighting for age and gender by region, the vote results in the two studies is almost identical.

Summary of Key Findings

- Only 46% of Ontarians say they would vote for either of the two major parties if an election were held today. Almost one in five are undecided.
- More than one-in-three (36%) are not currently aligned to any political party.
- As their campaigns kick off, all three leaders have a negative net favourability score, with Tim Hudak's being the most negative.
- Kathleen Wynne is favoured as Premier. Despite his negative favourability, Tim Hudak ranks higher than Andrea Horwath on this measure. One-in-five (21%) don't know who would make the best Premier.
- Half (51%) of Ontarians are dissatisfied with the provincial budget.
- A majority (57%) say it's time for a change in the Ontario government, but almost as many (55%) are afraid of what Tim Hudak and the PCs might do if they form government.
- More than half (53%) support the decision to call an election.

Decided Vote Comparisons: Telephone vs Online



NOTE: "Refused" / "Would not vote" not shown

Decided Vote Data Comparison

Decided provincial vote intent is consistent across both data sources.

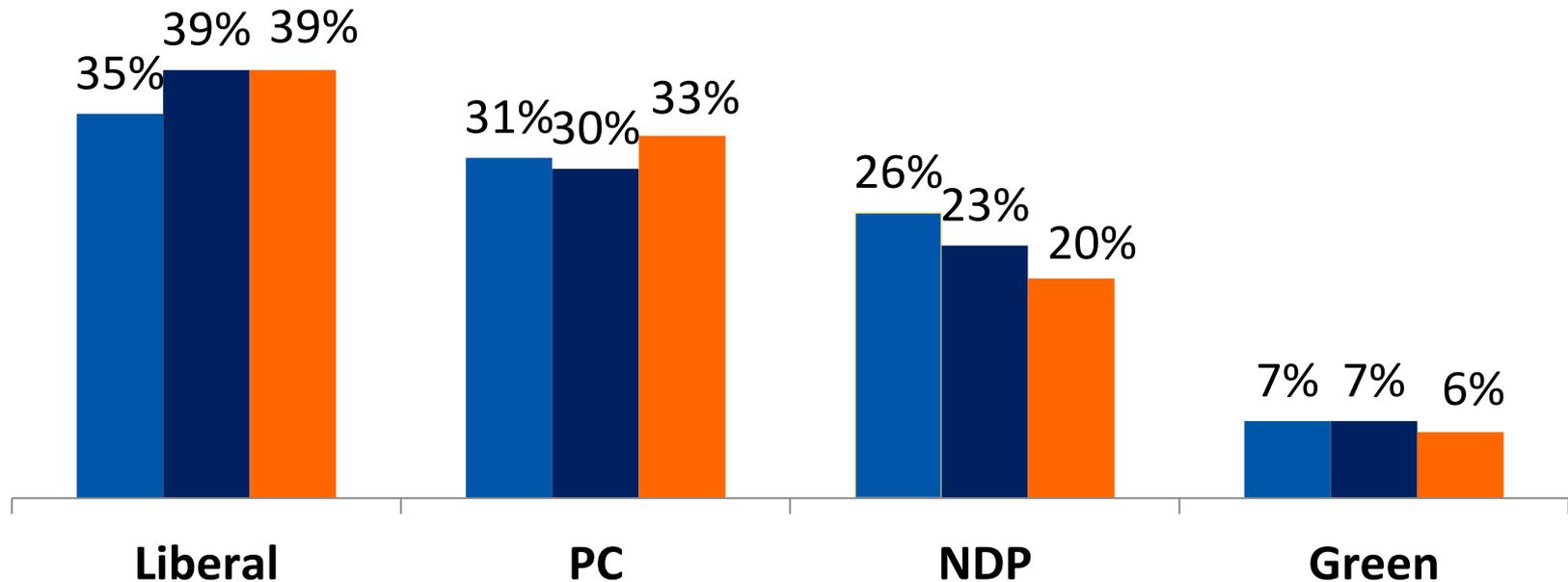
	RDD Telephone	Canada 20/20 Online	Difference
PC	32.8%	32.8%	0.0%
Liberal	38.7%	38.8%	-0.1%
NDP	23.7%	19.9%	3.8%
Green	4.3%	6.5%	-2.2%
Other	0.5%	2.0%	-1.5%

CTM Decided Vote Tracking Spring 2014 - Online

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?

[Provincial Decided Vote]



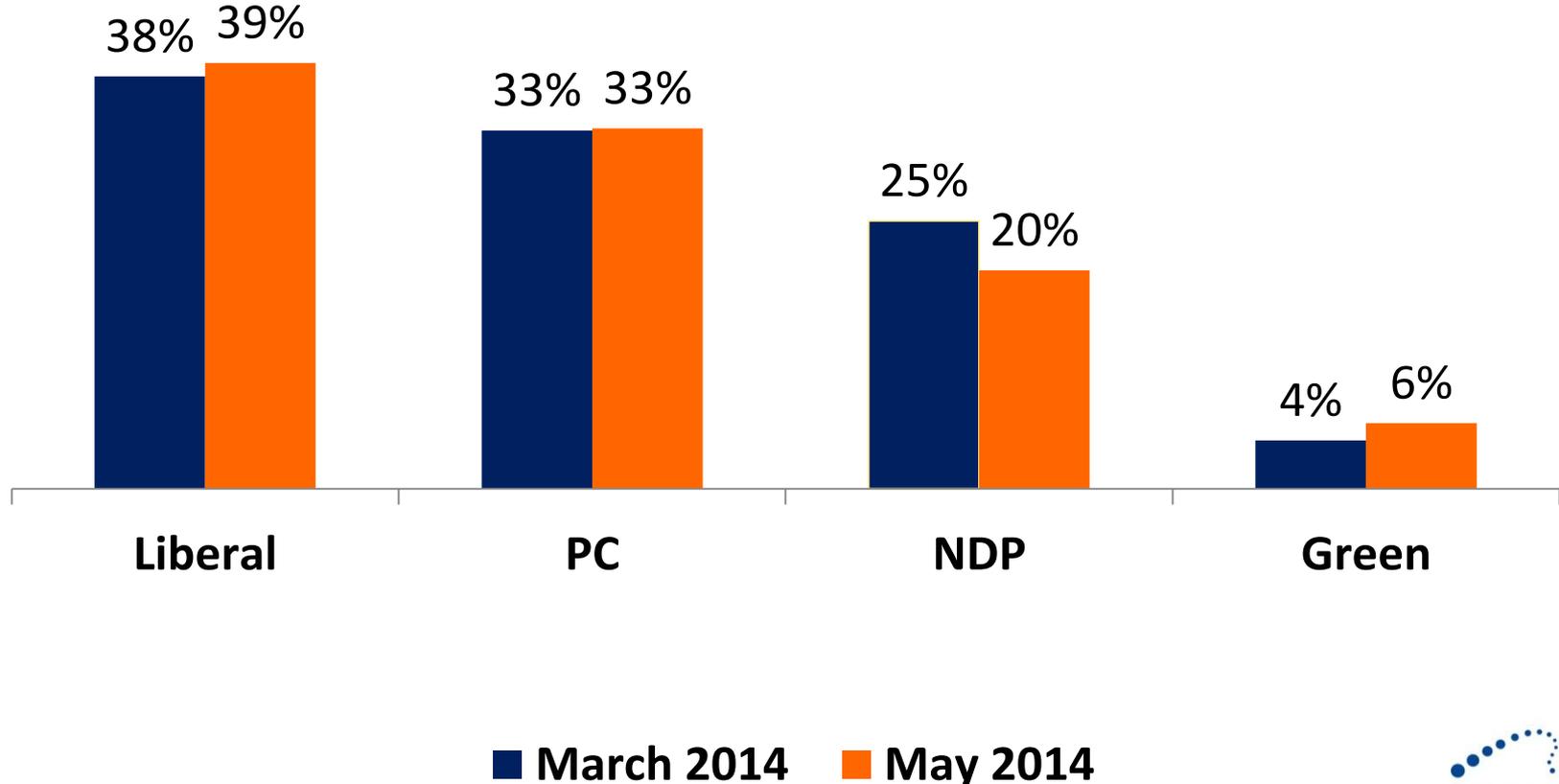
■ March 2014 ■ April 2014 ■ May 2014

OTM Decided Vote Tracking Spring 2014 - Telephone

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?

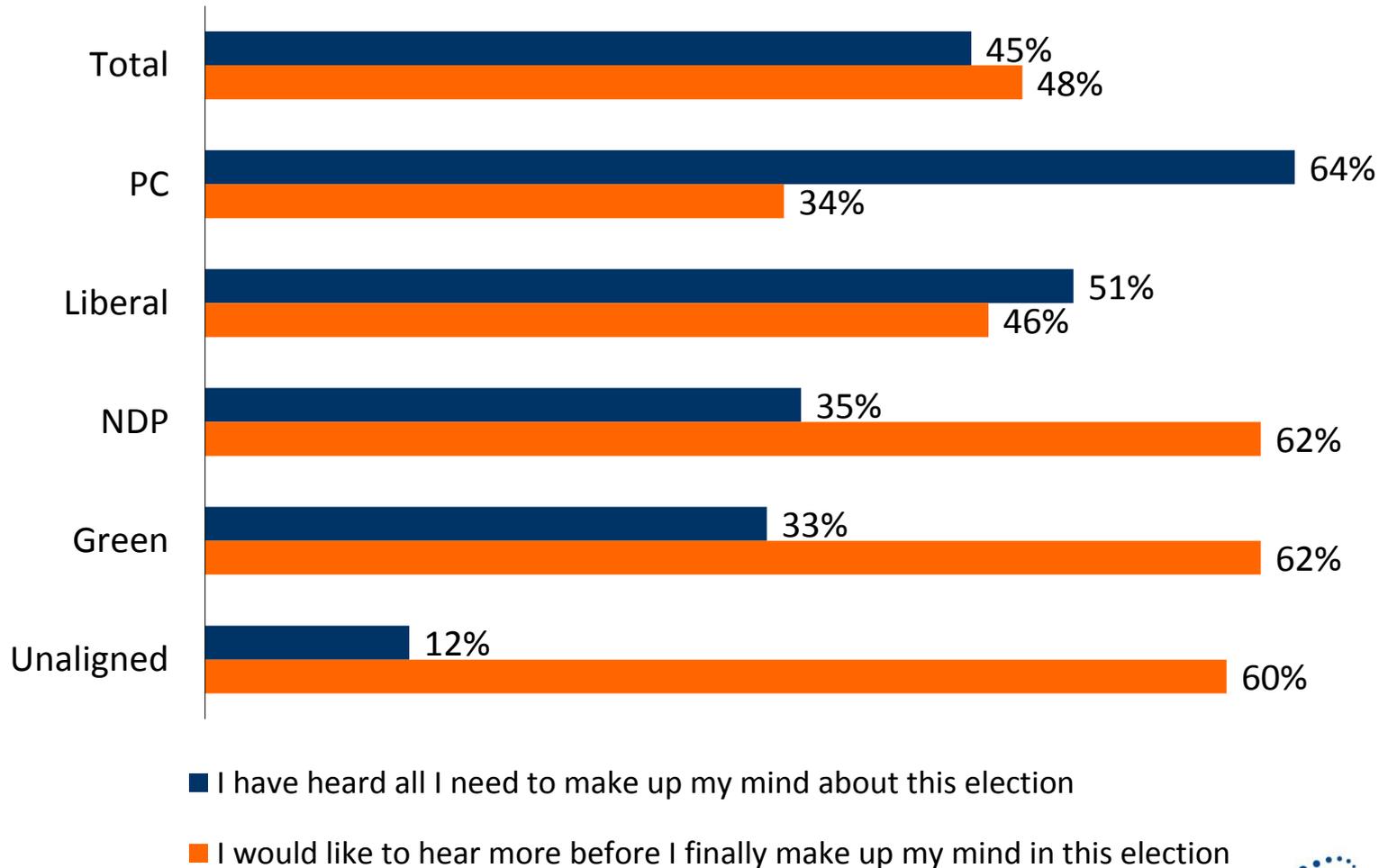
[Provincial Decided Vote]



Tory and Grit voters have up their minds; everyone else wants to hear more



Which statement is closest to your own about the upcoming election? (OTM Telephone results)



Note: 'Don't know' not shown

Federal and provincial preferences show strong overlap – CTM Online results

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**]

AND

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

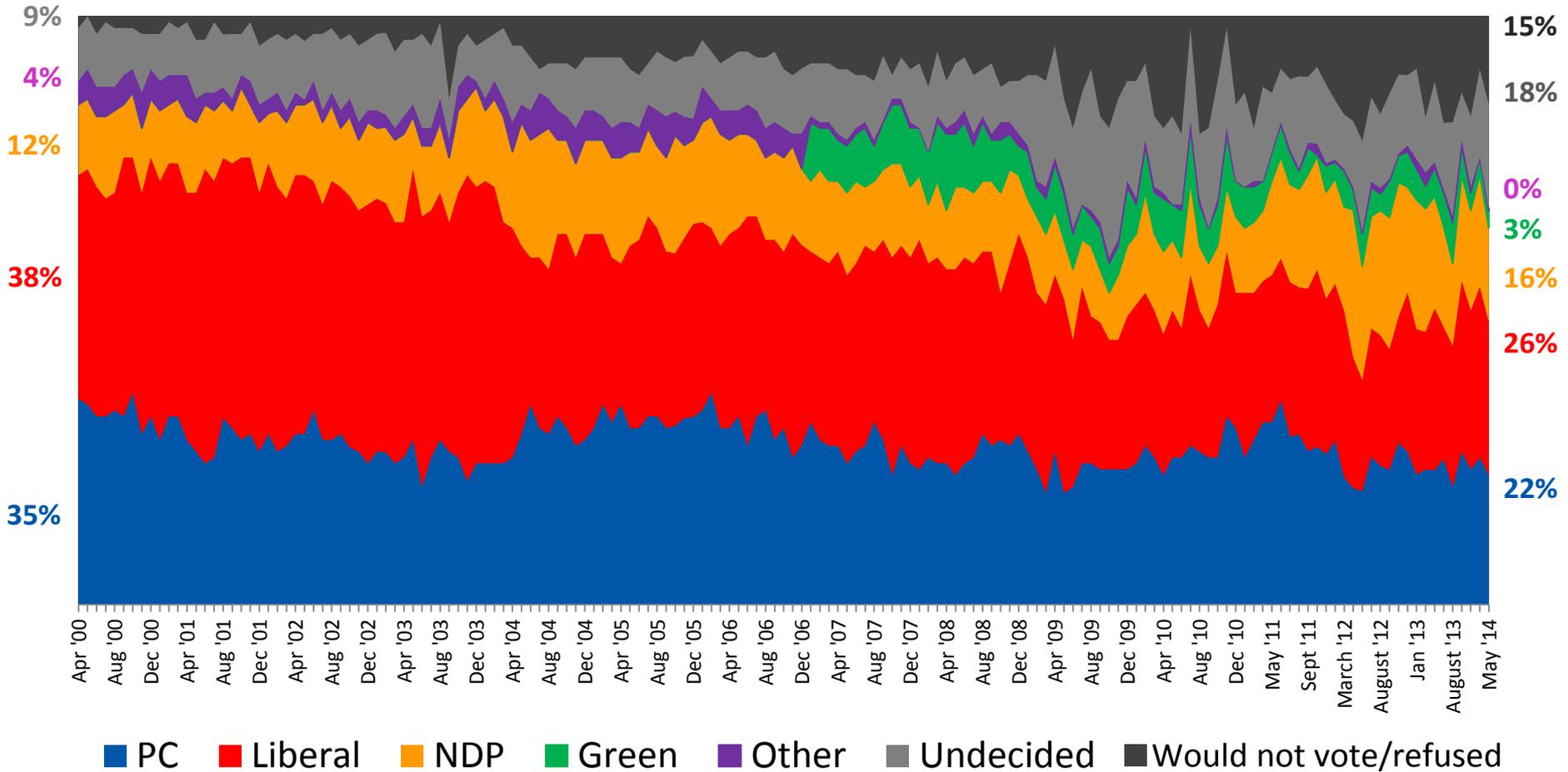
[asked of all respondents]

Federal Vote

	Conservative	Liberal	NDP	Green	Unaligned
PC	83%	6%	1%	2%	5%
Liberal	7%	82%	9%	15%	7%
NDP	5%	7%	84%	4%	3%
Green	0%	2%	3%	77%	1%
Unaligned	5%	3%	3%	2%	82%

The pool of undecided voters continues to grow

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?... In that case, which party's candidate do you lean toward slightly? **[Vote + Lean]** [Ontario This Month Telephone Surveys]

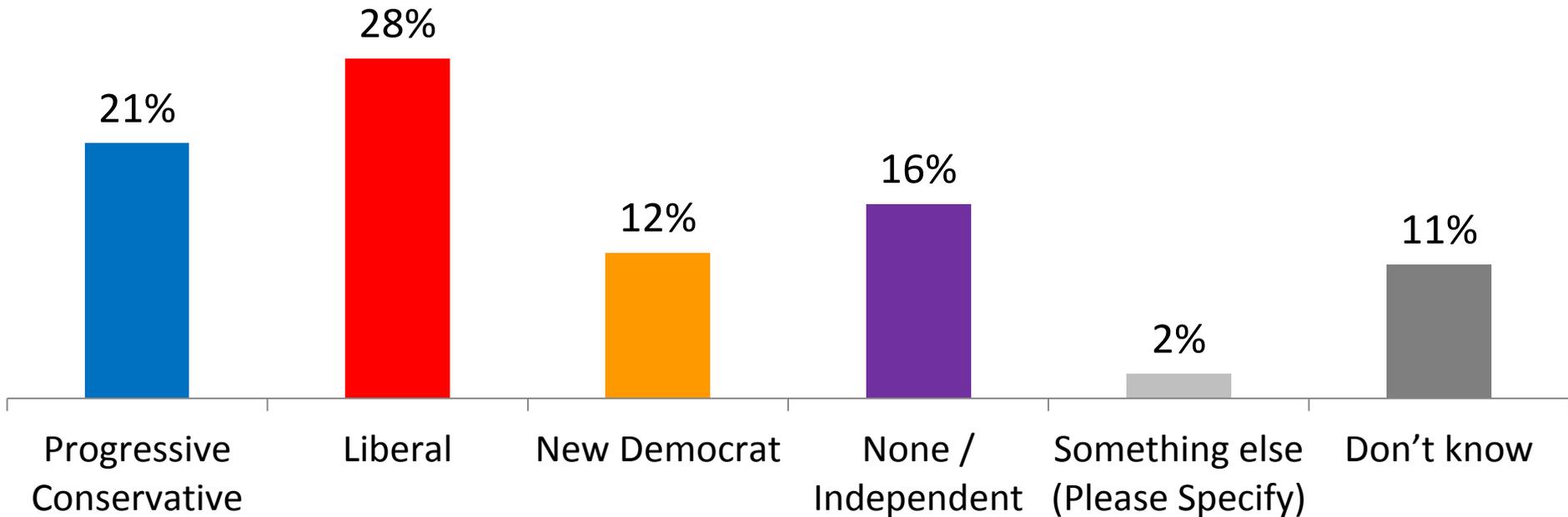


Party Identification



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?

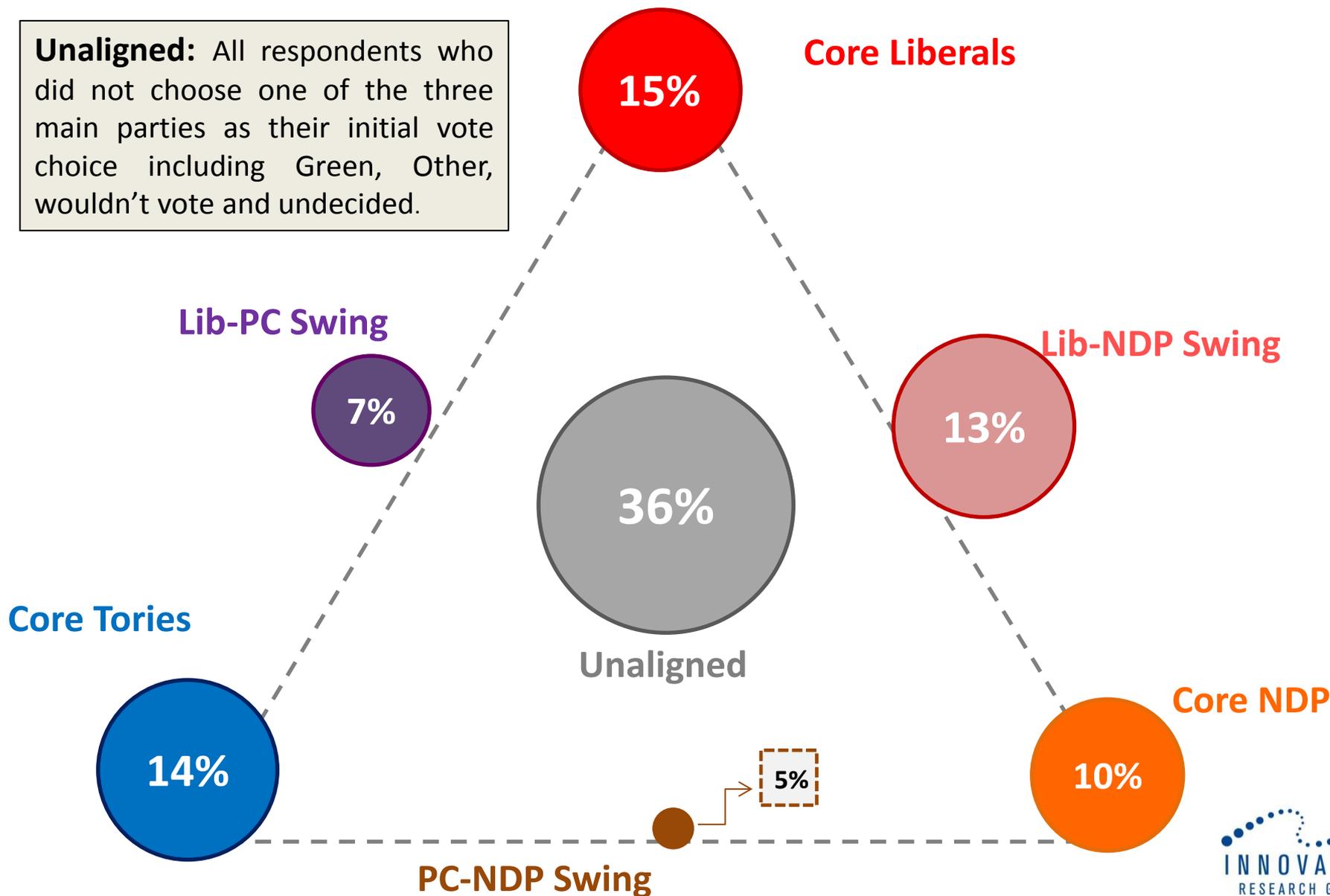
[asked of all OTM telephone respondents]



NOTE: Refused (10%) not shown

Battleground Segments Using Telephone Results

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.



Online In-depth Results

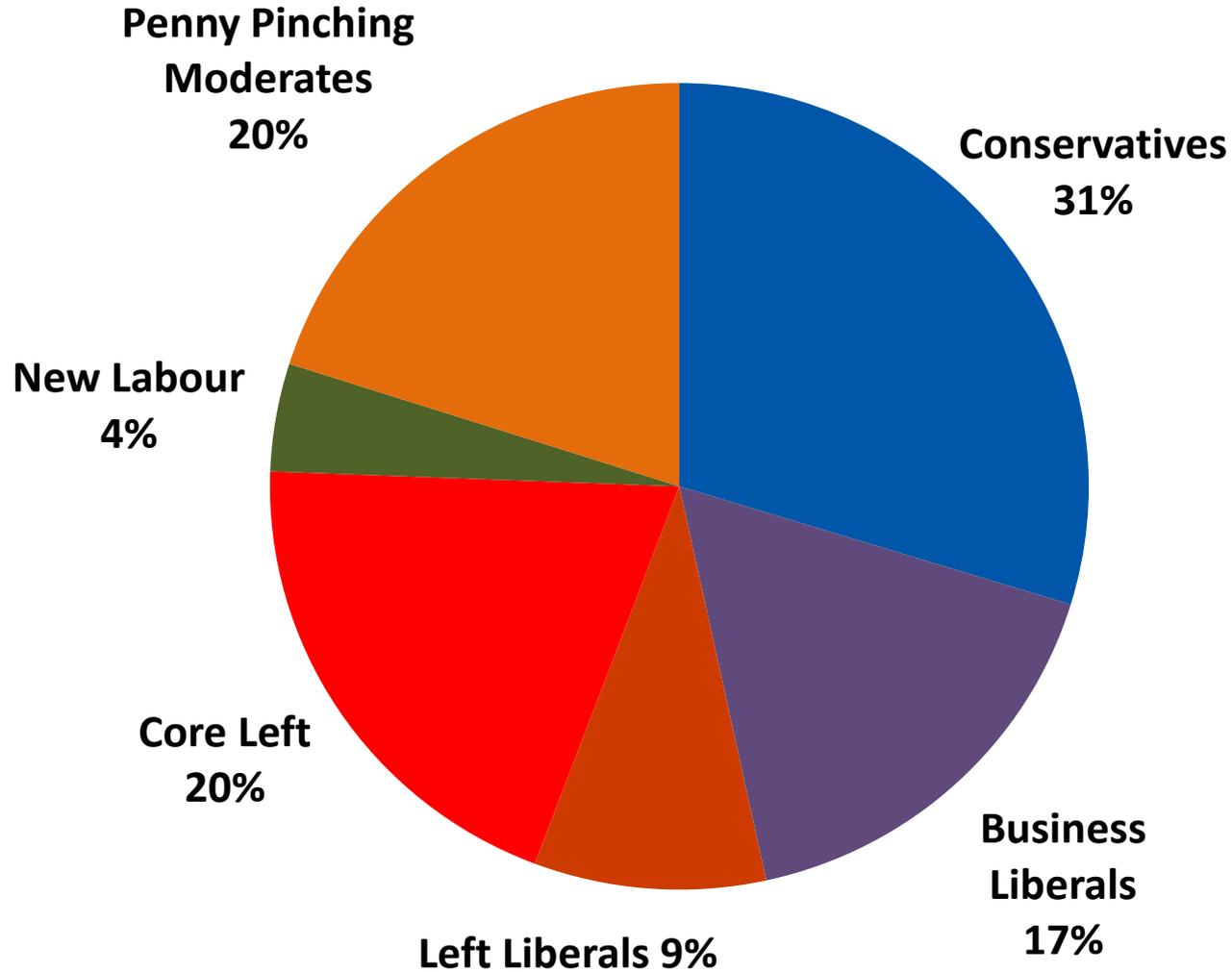
Political Segmentation

- Not all voters are alike to parties. Some voters are more critical in assembling a winning coalition than others. Parties care more about how those target voters feel about issues than they care about the overall response.
- With that in mind, this section details three different ways of segmenting the voting public. In the following sections we use those segmentations in analyzing the results.
- **Vote Conflict Clusters:** Often we find people who don't feel the governing party deserves re-election when they focus just on the government, but who feel that party is best able to run the government when they compare them to their peers. The lesser of evils in other words. Those Time for a Change Liberals are a key focus of all parties.
- **Party Loyalty Clusters:** Often people like more than one party. We asked people how likely they are to vote for all four main parties and then grouped people together who shared similar perspectives.
- **Value Clusters:** While many people don't know many details about government or politics, most people have a good sense of what government's goals should be and how it should conduct itself. We gave people a series of value choices and then grouped people by shared perspectives. Appealing to groups who share common values provides a strong direction when the party formulates policy.

Value Clusters

- If we want to understand Ontarians' attitudes towards politics, it's useful to group together Ontarians who have similar values and beliefs. We can then compare how different types of Ontarians view things differently on key choices governments make.
- In our CTM online survey, survey respondents were asked to make 3 different value choices:
 - Is it more important for government ... ROTATE 1 & 2
 - 1 To create opportunities so that everyone can compete on their own to be the best they can be,
 - 2 To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own
 - Do you think the profit system ... ROTATE 1 & 2
 - 1 Brings out the worst in human nature
 - 2 Teaches people the value of hard work and success
 - When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on ... ROTATE 1 & 2
 1. Their ability to afford the programs and services
 2. The public's need for the programs and services
- Six **value clusters** were created after running statistical analysis.

Value Clusters



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%

Value Cluster Descriptions

- **Conservatives** believe that government spending should be based on ability to pay, not need, that profit brings out the best in people and that government should focus on opportunity, not redistribute wealth. (Harris)
- **Business Liberals** believe that government spending should be based on need, not ability to pay, but agree that profit brings out the best in people and that government should focus on opportunity, not redistribution of wealth. (Martin)
- **Left Liberals** believe that government spending should be based on need, not ability to pay and that government should focus on opportunity, not redistributing wealth, but believe that profit brings out the worst in people. (Copps)
- **Core Left** believe that government spending should be based on need, not ability to pay and that profit brings out the worst in people, but also think government should redistribute wealth, not just create opportunity. (Broadbent)
- **New Labour** believe that government spending should be based on need, not ability to pay and think government should redistribute wealth, not just create opportunity, but think profit brings out the best in people. (Robertson/Blair)
- **Penny Pinching Moderates** are divided on or unsure whether government should redistribute wealth or create opportunity, they tend to believe profit brings out the worst in people, but are committed to government spending based ability to pay. (Robertson/Blair)

PCs drawing primarily from Conservative, Liberals well ahead of NDP among most left groups



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%

Most are dissatisfied with the provincial budget, especially Conservatives. New Labour is happy with it.

Q In general, how satisfied are you with the provincial budget?
[asked of all respondents]

	Conser- vative	Business Liberal	Left Liberal	Core Left	New Labour	Penny Pinching Moderates	Total
Very satisfied	7%	11%	15%	22%	15%	6%	12%
Somewhat satisfied	12%	40%	37%	46%	61%	21%	29%
Somewhat dissatisfied	15%	27%	20%	14%	10%	32%	20%
Very dissatisfied	59%	10%	17%	11%	0%	30%	31%

Note: "Don't know" not shown

The 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

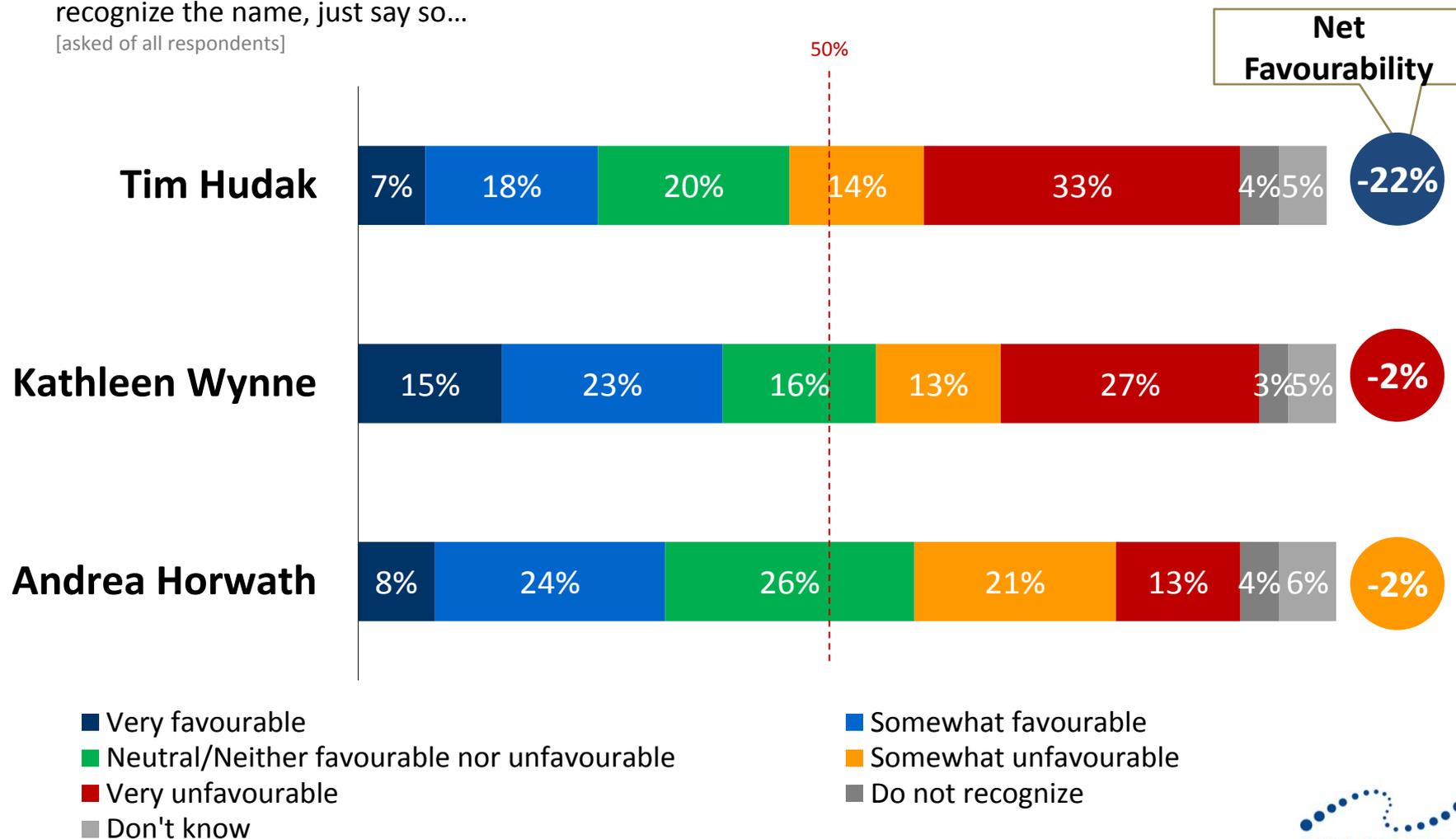
None of the party leaders have a positive net favourability score ⁴⁵

score

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...

[asked of all respondents]



Note: 'Refused' not shown

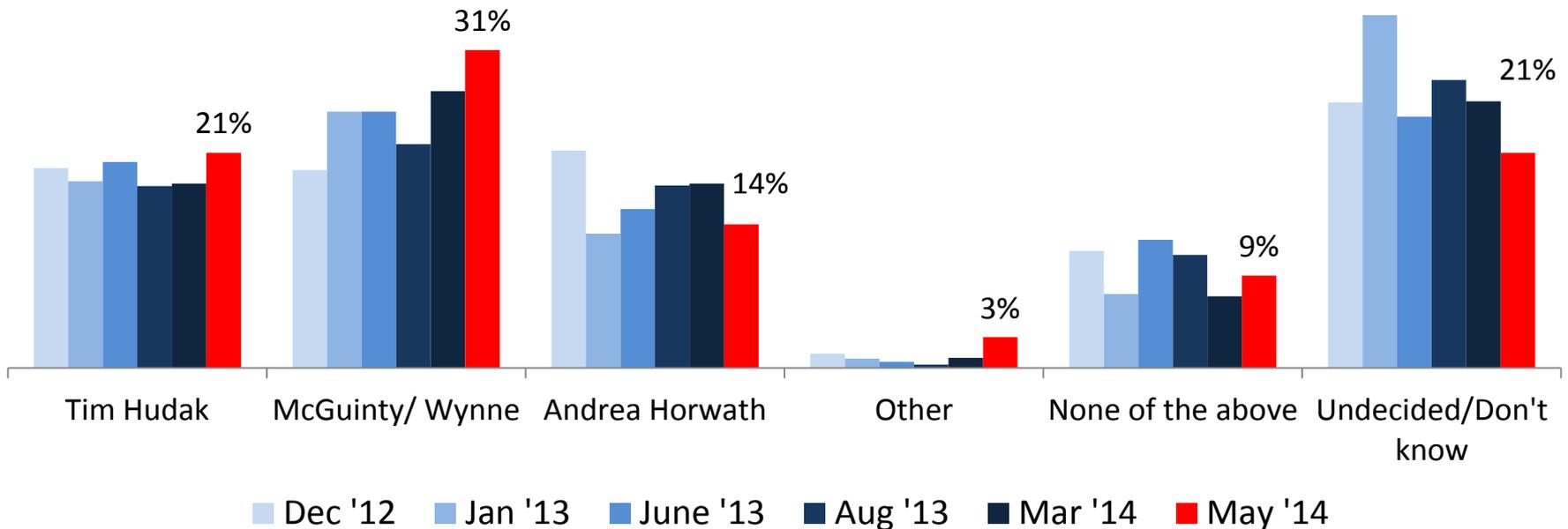
Change in Horwath's favourability from March to May

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%

A plurality feel Kathleen Wynne would make the best premier of Ontario, followed by Hudak and then Horwath

Q Which of the following leaders would make the best Premier of Ontario?
[asked of all respondents]



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

Kathleen Wynne deemed best Premier of Ontario, particularly among New Labour and Core Left groups.

Q

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

[asked of all respondents]

	Conser- vative	Business Liberal	Left Liberals	Core Left	New Labour	Penny Pinching Moderates	Total
Tim Hudak	46%	12%	7%	4%	20%	14%	21%
Kathleen Wynne	14%	38%	40%	54%	51%	19%	31%
Andrea Horwath	8%	11%	15%	23%	15%	18%	14%
None of the above	13%	7%	5%	3%	3%	15%	9%
Undecided	16%	29%	32%	13%	8%	29%	21%

Note: "Other" not shown

A plurality of Conservatives have a favourable opinion of Tim Hudak



Tim Hudak – PC: 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.

[asked of all respondents]

	Conser- vative	Business Liberal	Left Liberals	Core Left	New Labour	Penny Pinching Moderates	Total
Very favourable	18%	4%	3%	2%	7%	3%	7%
Somewhat favourable	32%	15%	8%	4%	11%	17%	18%
Neutral	24%	24%	26%	10%	14%	16%	19%
Somewhat unfavourable	11%	18%	11%	14%	17%	16%	14%
Very unfavourable	12%	26%	40%	66%	44%	32%	33%

Kathleen Wynne most popular among New Labour and the Core Left



Kathleen Wynne – Liberal: 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.

[asked of all respondents]

	Conser- vative	Business Liberal	Left Liberal	Core Left	New Labour	Penny Pinching Moderates	Total
Very favourable	8%	14%	21%	31%	23%	5%	15%
Somewhat favourable	14%	29%	21%	28%	40%	21%	22%
Neutral	11%	20%	20%	16%	12%	19%	16%
Somewhat unfavourable	12%	15%	17%	12%	11%	13%	13%
Very unfavourable	52%	12%	10%	10%	9%	28%	27%

Core Left have the most favourable opinion of Andrea Horwath

Horwath

Q

Andrea Horwath - NDP: 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.

[asked of all respondents]

	Conser- vative	Business Liberal	Left Liberal	Core Left	New Labour	Penny Pinching Moderates	Total
Very favourable	7%	5%	5%	11%	4%	8%	8%
Somewhat favourable	17%	22%	22%	33%	36%	24%	24%
Neutral	25%	32%	37%	20%	18%	24%	26%
Somewhat unfavourable	23%	18%	16%	22%	25%	19%	21%
Very unfavourable	25%	7%	9%	8%	5%	8%	13%

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%

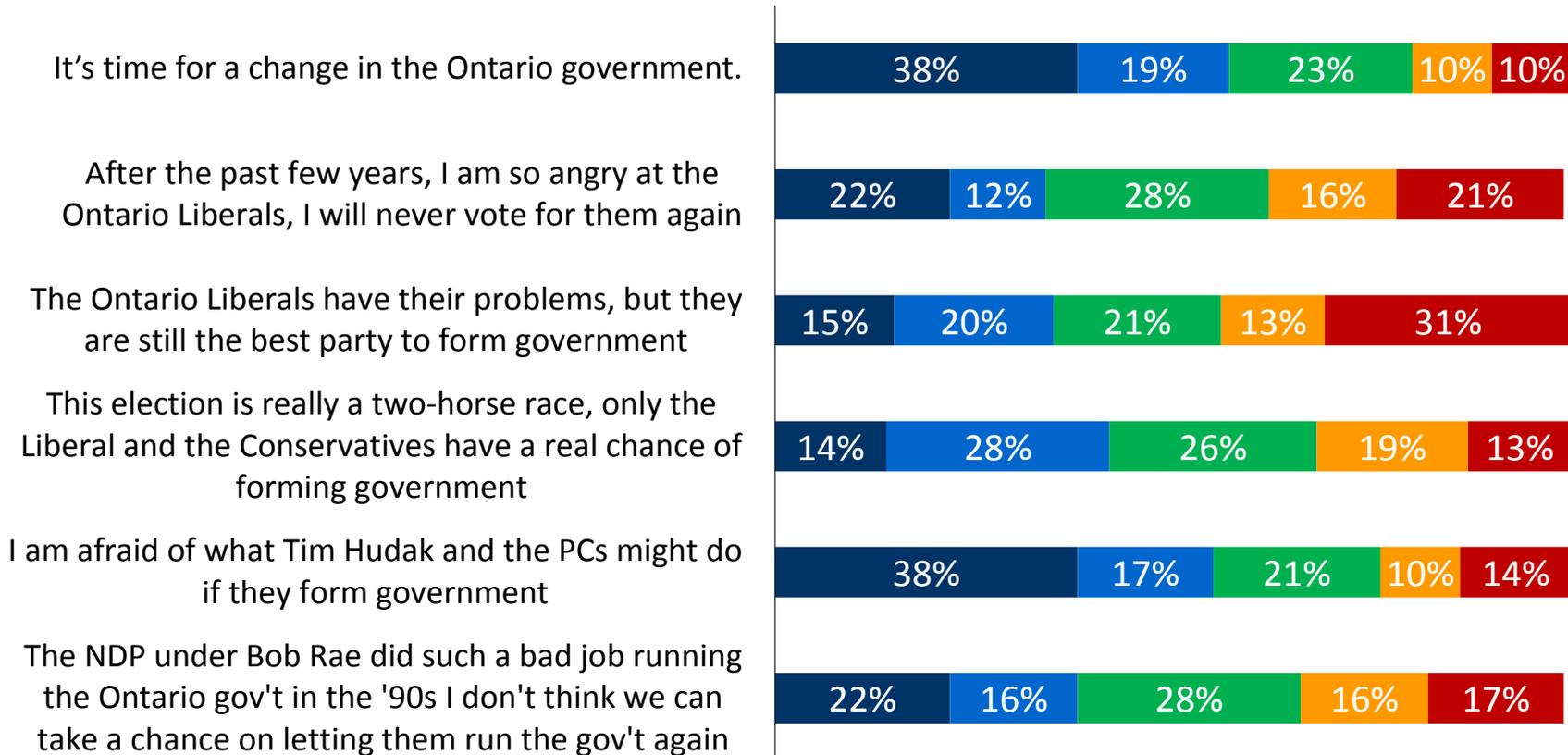
Framing the Election

- There are key underlying attitudes that frame choices in an election. In this survey we asked about six of them. The following slides show overall reaction as well as how agreement or disagreement with their attitudes influences political choice.
- Three items relate to Time for a Change
 - It's time for a change in the Ontario government.
 - After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again
 - The Ontario Liberals have their problems, but they are still the best party to form government.
- Three items test attitudes regarding the opposition
 - I am afraid of what Tim Hudak and the PCs might do if they form government.
 - 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.
 - This election is really a two-horse race, only the Liberal and the Conservatives have a real chance of forming government. (Movement on this item was key to the Orange Crush)

Most feel it's time for a change, but as many are afraid of what Tim Hudak and the PCs might do

Q

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



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

PC voters most strongly feel it is time for a change in government.

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/ DK	Somewhat disagree	Strongly disagree
PC	55%	25%	9%	2%	3%
Liberal	7%	24%	38%	87%	92%
NDP	21%	28%	15%	4%	3%
Green	5%	7%	7%	2%	2%
Unaligned	12%	17%	32%	4%	0%

Anger drives Tory vote, not NDP

Q

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

[asked of all respondents]

“After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again.”

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	67%	41%	19%	13%	4%
Liberal	4%	12%	23%	49%	79%
NDP	16%	27%	17%	20%	11%
Green	6%	2%	8%	7%	2%
Unaligned	7%	18%	33%	11%	4%

Liberals do well with those who feel they are better than the alternatives

Q

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

[asked of all respondents]

“The Ontario Liberals have their problems, but they are still be best party to form government.”

	Strongly agree	Somewhat agree	Neither/DK	Somewhat disagree	Strongly disagree
PC	2%	5%	11%	32%	66%
Liberal	91%	71%	21%	8%	1%
NDP	3%	15%	19%	29%	19%
Green	1%	3%	8%	13%	5%
Unaligned	3%	6%	42%	19%	9%

NDP vote depends on voters disagreeing that this election is a two-horse race

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, on the Liberals and the Conservatives have a real chance of forming government.”

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	44%	30%	23%	26%	22%
Liberal	39%	46%	28%	32%	16%
NDP	4%	10%	11%	25%	44%
Green	6%	4%	5%	6%	8%
Unaligned	9%	10%	33%	10%	9%

Dismissal of fear critical to PC support, fear of PCs drives Liberal vote

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	1%	21%	20%	74%	94%
Liberal	59%	32%	21%	8%	1%
NDP	27%	25%	10%	4%	2%
Green	6%	6%	9%	4%	1%
Unaligned	7%	16%	41%	10%	3%

Negative associations with Bob Rae drive PC vote, NDP vote depends on disagreeing with this message

Q

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

[asked of all respondents]

“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.”

	Strongly agree	Somewhat agree	Neither/ DK	Somewhat disagree	Strongly disagree
PC	65%	31%	19%	16%	5%
Liberal	23%	37%	35%	45%	31%
NDP	3%	9%	10%	23%	49%
Green	3%	5%	7%	5%	8%
Unaligned	7%	19%	29%	11%	7%

What this means for the Liberals

- The plan is working.
 - While not everyone liked the budget, it was well received by key swing vote groups.
 - Horwath is gaining negatives as the NDP lose votes.
 - Voters are growing more afraid of the PCs.
- Leave the budget in the window.
 - Remind people what the NDP voted against.
 - Remind people what you stand for.
- Focus on the Hudak threat to social programs. The more scared voters are of Hudak, the more likely they are to vote Liberal. Plus when you defend social programs, you leave potential NDP switchers feeling like you share their values.
- Beware of any potential perks or patronage stories, especially those from the last year. You have a bus. Don't be shy to throw people under it.

What this means for the NDP

- There is a crisis on the left.
 - The Liberal plan to move to the left is working. Wynne is doing better with voters on the ideological left now than in March.
 - The NDP simply cannot build a winning coalition with a strong base on the left.
- Horwath's reputation is in trouble.
 - Horwath was better liked than McGuinty but she is NOT better liked than Wynne.
 - Her relative strength vs Wynne is compassion – build on that. Consider a human interest campaign centered on people who are falling between the cracks in education, health and social services. Launch an attack that will dent Wynne's credibility with the left.
- Now is the time to lean on your friends in the public service for brown envelopes. Find the perks and patronage stories from the last year that can be tied directly to Wynne.

What this means for the PCs?

- The PCs are the primary alternative to the Liberals. They have been holding in the low 30's of decided vote, in the low to mid 20s of the raw vote including the undecided and alienated.
- Core Conservatives are motivated and firmly committed. There is little more to be gained simply appealing to them. It is time to broaden the coalition.
- Our previous research in March shows the issue matrix favours the PCs and the debt and deficit message can appeal to a broader public IF it is couched in human interest terms.
- The jobs message has limited appeal as our March research shows that many swing voters want an active government, not a passive government.
- The enemy of my enemy is my friend. The PCs need wherever possible to run their campaign in a way that lets the NDP recover. It is extremely difficult for the PCs to win without the NDP siphoning off Liberal support.
- The PCs must defend against the rising fears of a PC government. Unless people actually disagree with the fear, they tend not to vote PC. One key issue for the PCs is how to defend against the Working Families ads. Ideally, they would find a way to frame those ads in a positive light for their swing voters.

The Big Picture

- It is hard to imagine the Liberals losing government without more voters on left saying there are angry with the Liberals.
- It is hard to imagine the PCs winning if fears of a PC government rise further or the decided NDP vote drops below 20 percent. The PC's must reach deeper into the Business Liberals or Penny Pinching Moderates to win.
- The Liberal budget did not work with everyone. In fact, more people are dissatisfied than satisfied with it. But it worked very well with the Liberal voters on the left of the political spectrum.
- The NDP failed to bring current Liberal supporters along with them when they decided to defeat the government. That failure limits their potential to grow and has solidified the Liberal base. This is very significant and could turn out to be a key turning point for the Liberals.
- The Liberal's remain vulnerable on time for a change. New scandals on perks and patronage, especially any tied directly to Wynne, could demotivate their base and push swing voters away.
- For the NDP to grow, they need to extend the attack beyond perks and patronage and into core services. Front line workers, their clients and people who care about them need to lose hope in Wynne and the Liberals for the NDP to grow.



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