Roads to Victory:
The Ontario Political Landscape

Prepared for:

PAAC
PUBLIC AFFAIRS ASSOCIATION OF CANADA

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Overview

This presentation combines results from two surveys:

Ontario This Month

- An RDD sample of 600 households with listed telephone numbers, conducted March 15th to 25th, 2014

- Can be generalised using sampling theory

- Allows us to identify ridings from sample

- Weakness: No coverage of cell only households

- We also created a combined database of 4,800 telephone interviews completed since Premier Wynne took office to look at regional results.

Canada 20/20

- A representative online sample of 1,017 conducted March 21st to 26th, 2014

- Weakness: Margin of error not applicable, not a random sample

- More cost effective, allows for deeper insight

We use telephone data for incidence and online data for insights.

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Margins of Error

Ontario This Month

- Total sample: n=600, margin of error $\pm$ 4.0 percentage points, 19 times out of 20.

- Regional sample sizes from combined database of 4800 telephone interviews completed since Premier Wynne took office in February 2013:

    - Toronto Centre: n=538, margin of error ±4.2%

    - Outer Toronto: n=491, margin of error ±4.4%

    - West Metro Belt: n=617, margin of error ±4.0%

    - North/East Metro Belt: n=590, margin of error ±4.0%

    - South West Ontario: n=547, margin of error ±4.2%

    - South Central Ontario: n=724, margin of error ±3.6%

    - Eastern Ontario: n=631, margin of error ±3.9%

    - Central Ontario: n=362, margin of error ±5.2%

    - Northern Ontario: n=320, margin of error ±5.5%

Canada 20/20

- Margin of error not applicable, not a random sample

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The Key Question for Campaign Strategy

Who will vote for you and why?

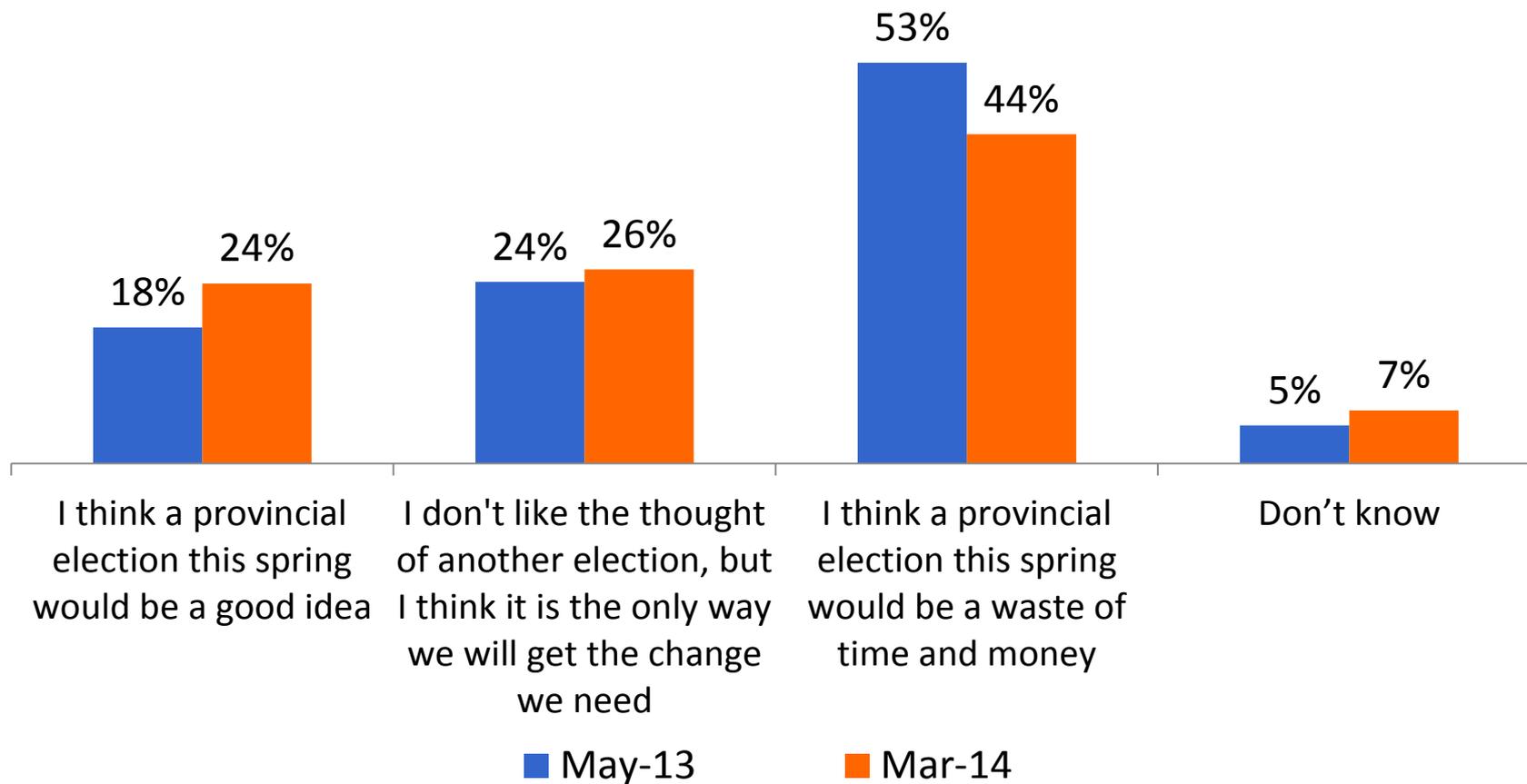**Should your focus be on:**

- Your party?

- Your leader?

- Your problems?

- Your solutions?

- Your character?

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The Horse Race

A 6 point increase over last year in the proportion who feel a spring election would be a good idea

Q There has been some talk about the opposition parties voting against the minority government in Ontario and causing an election this spring. Which of the following statements is closest to your point of view about a possible provincial election?

	May-13	Mar-14
I think a provincial election this spring would be a good idea	18%	24%
I don't like the thought of another election, but I think it is the only way we will get the change we need	24%	26%
I think a provincial election this spring would be a waste of time and money	53%	44%
Don't know	5%	7%

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Liberals 5 points ahead of PC, followed by NDP

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]

Party	Percentage
PC	33%
Liberal	38%
NDP	25%
Green	4%

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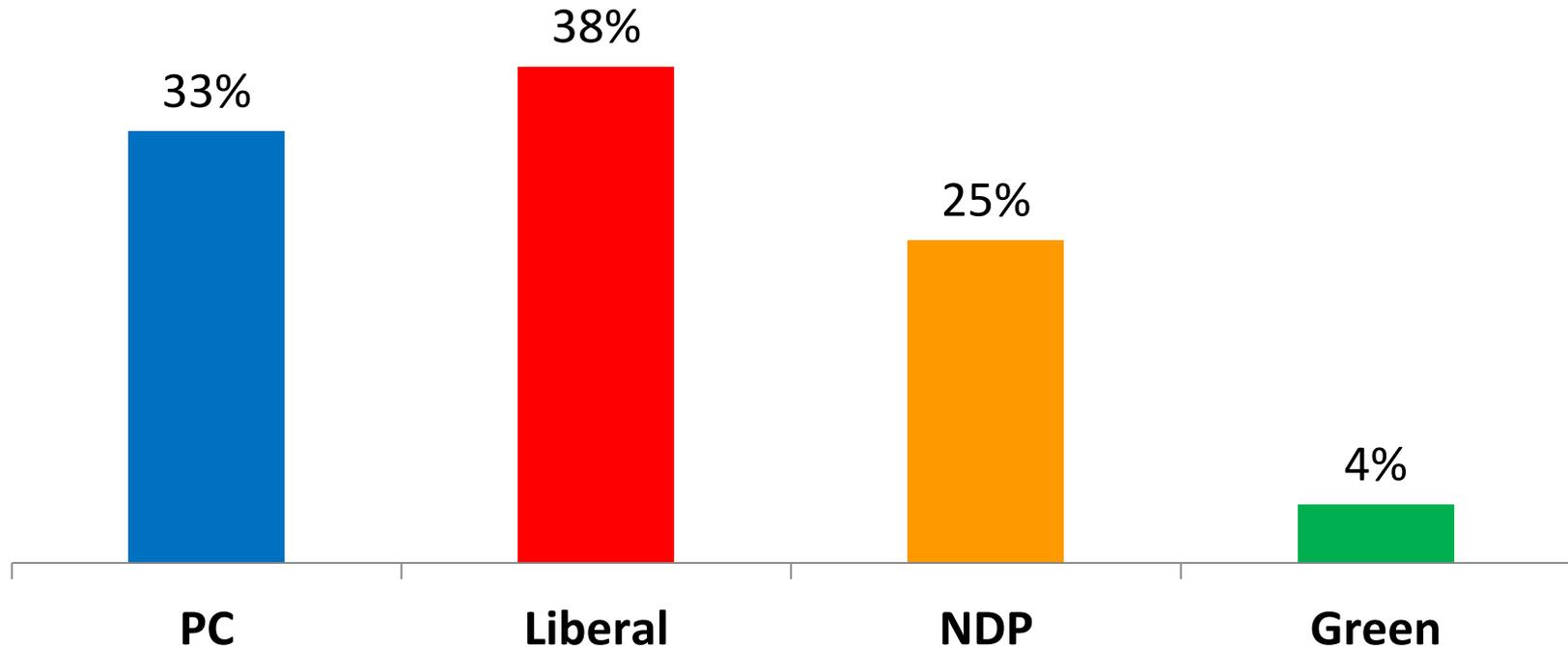
Most voters would like to hear more before making up their mind, Liberals most open to change

Q Which point of view is closest to your own?

(by Decided Vote)

	I have heard all I need	I would like to hear more	Don't know
Progressive Conservative	46%	52%	2%
Liberal Party	31%	66%	3%
New Democrats	46%	54%	1%
Green Party	30%	65%	

■ I have heard all I need to make up my mind in this election

■ I would like to hear more before I finally make up my mind in this election

■ Don't know

Note: 'Refused/None/Would not vote' (5%) not shown

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All parties eye the increasing size of the unaligned vote

Q If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the 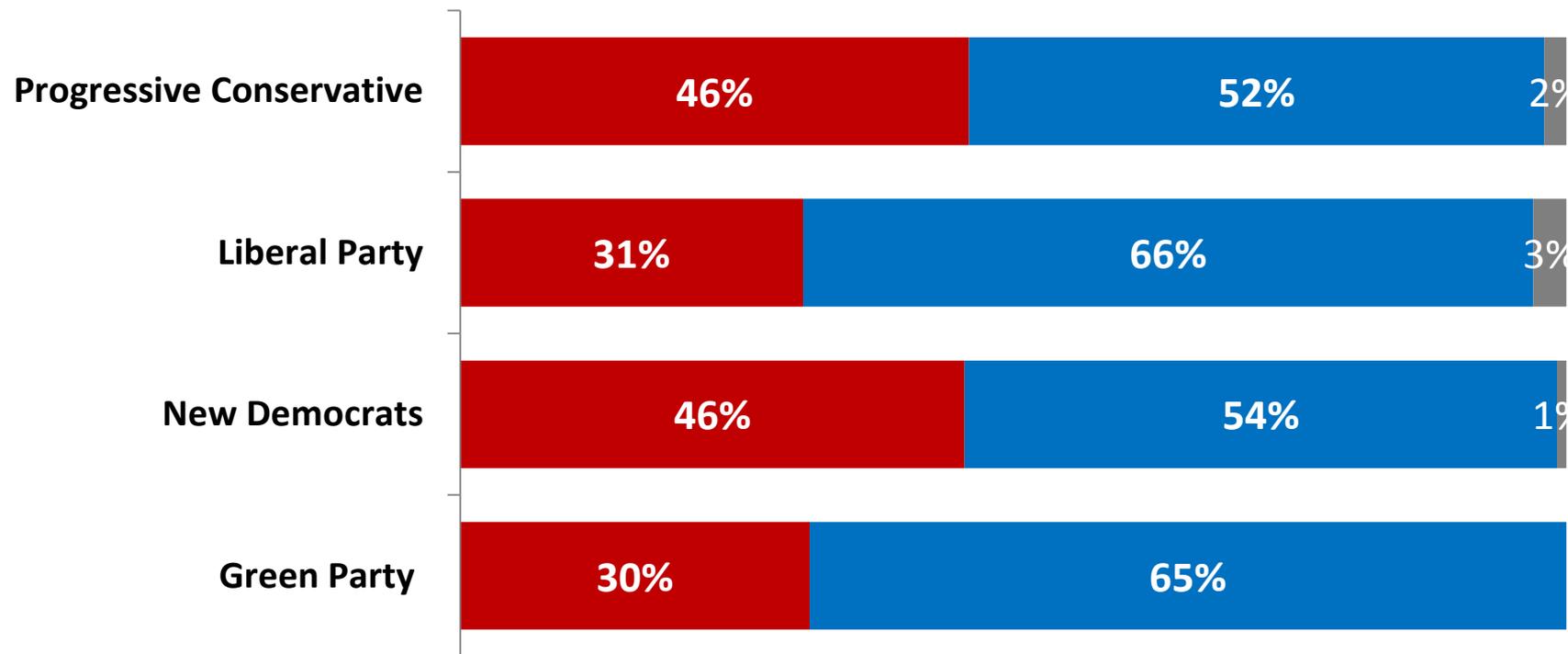New Democratic Party, the Green Party or another party?... In that case, which party's candidate do you lean toward slightly? [**Vote + Lean**]

Legend: PC (blue), Liberal (red), NDP (orange), Green (green), Other (purple), Undecided (grey)

Left axis labels: 9%, 4%, 12%, 38%, 35%

Right axis labels: 15%, 0%, 3%, 19%, 29%, 25%
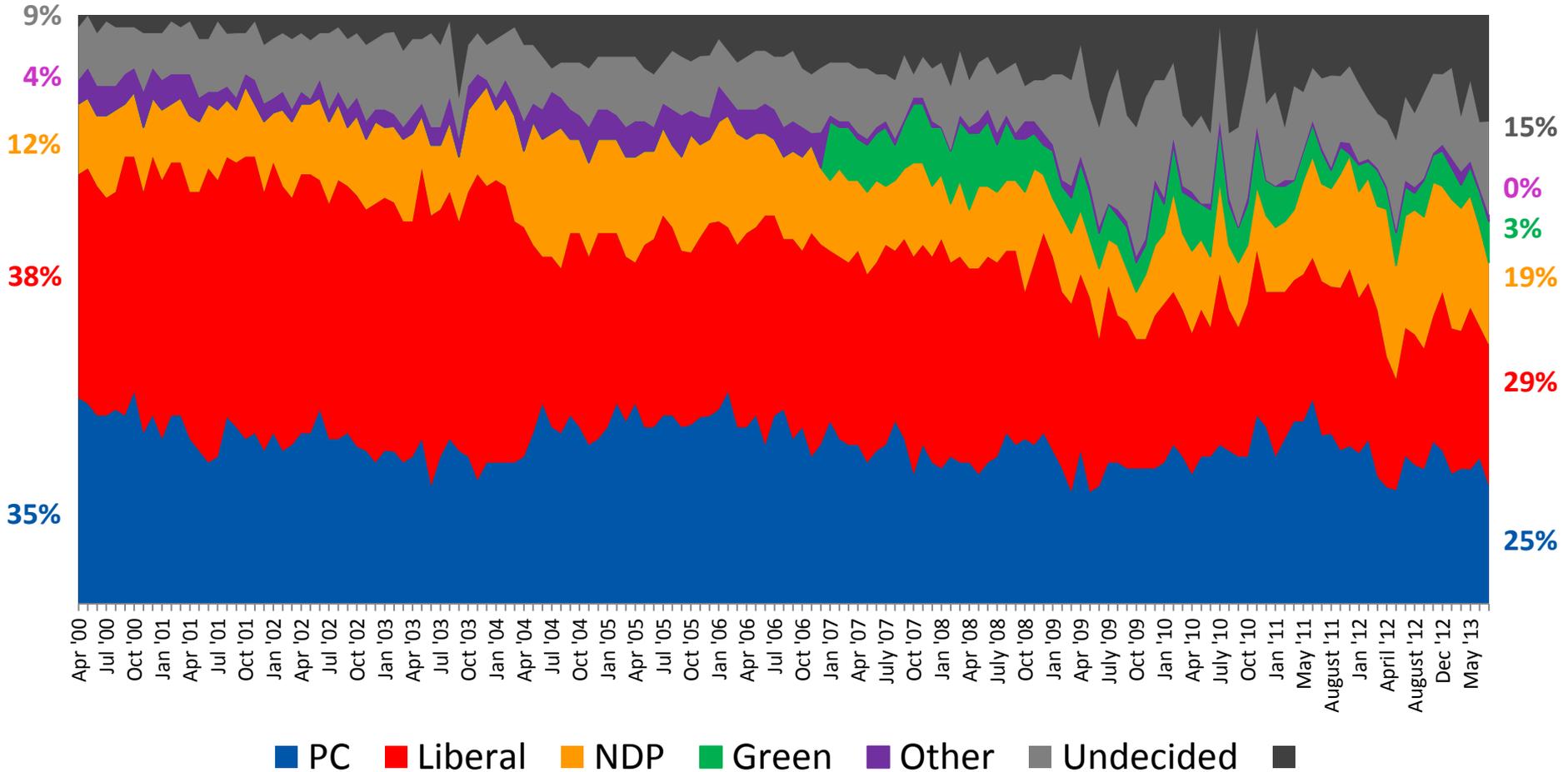
Counting Seats, Not Votes

Winners count seats, not votes

2011 Federal Results

Party	Vote Share	Seats	Seat Share
Conservatvies	44.4	73	69%
Liberals	25.3	11	10%
NDP	25.6	22	21%

2011 Provincial Results

Party	Vote Share	Seats	Seat Share
PC	35.4	37	35%
Liberal	37.5	53	50%
NDP	22.8	17	16%

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The PCs and NDP need big local turn-arounds to surpass the Liberals in seats

Swing Seats < 10%

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

Vote Intent by Region: Centre Toronto

Greater Toronto Area

NORTH / EAST METRO BELT

OUTER TORONTO

CENTRE TORONTO

WEST METRO BELT

38% Liberal
16% PC
21% NDP
4% Green
2% Other
10% Undecided / Don't know
7% Would not vote / None

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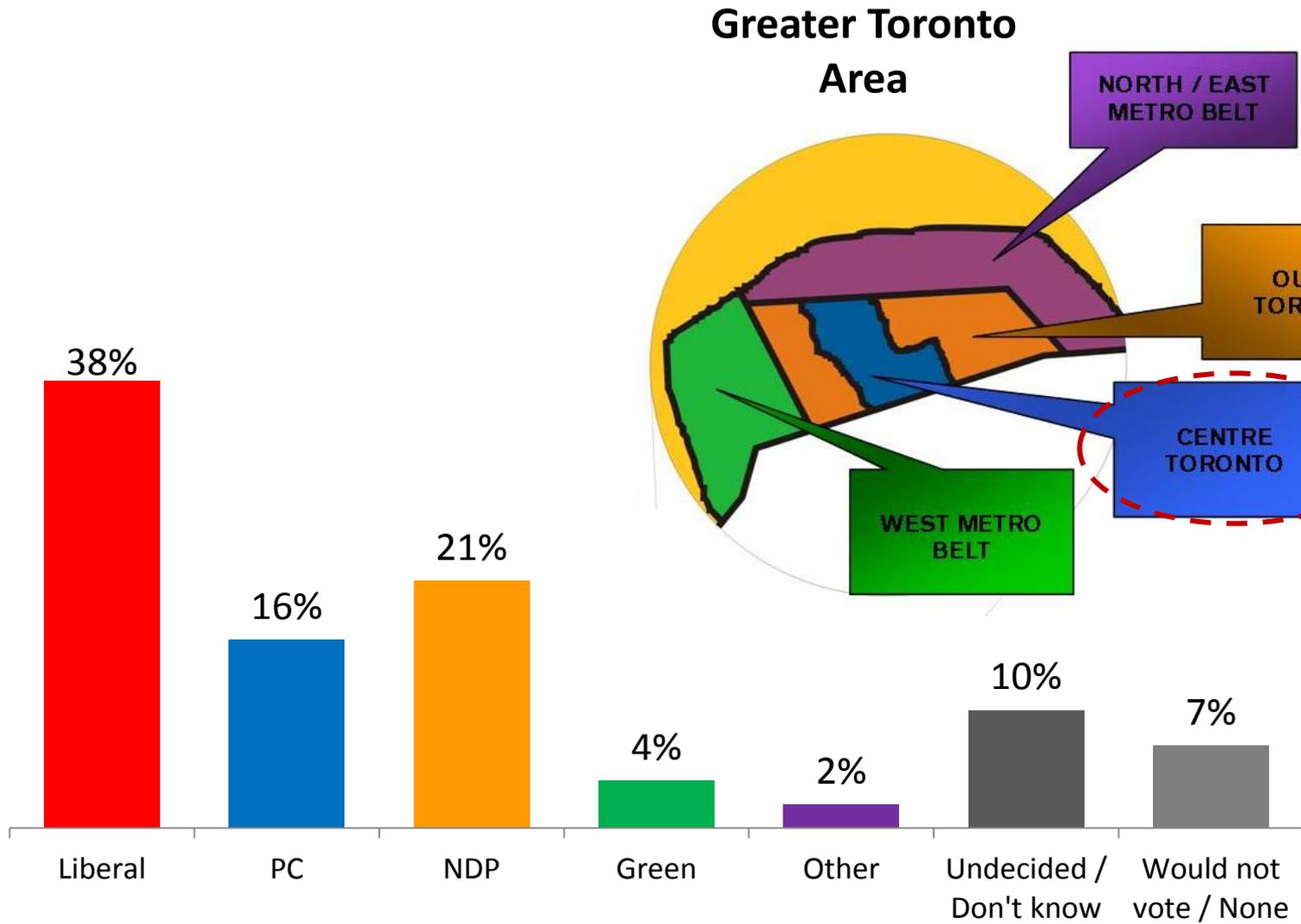
Vote Intent by Region: Outer Toronto

Greater Toronto Area

NORTH / EAST METRO BELT

OUTER TORONTO

CENTRE TORONTO

WEST METRO BELT

Liberal	PC	NDP	Green	Other	Undecided / Don't know	Would not vote / None
29%	23%	21%	1%	1%	12%	8%
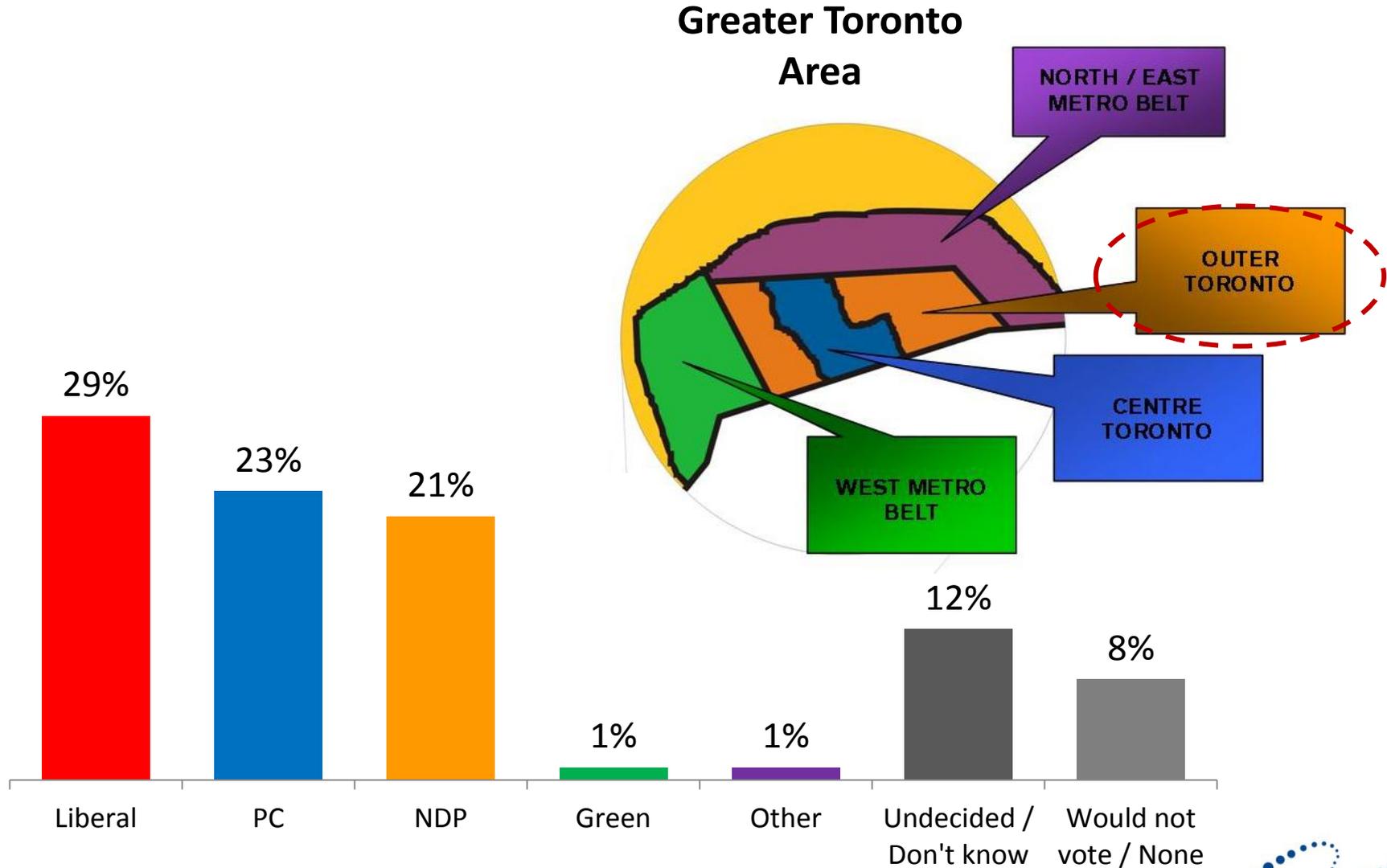
Vote Intent by Region: West Metro Belt

Greater Toronto Area

NORTH / EAST METRO BELT

OUTER TORONTO

CENTRE TORONTO

WEST METRO BELT

Liberal	33%
PC	21%
NDP	14%
Green	5%
Other	1%
Undecided / Don't know	13%
Would not vote / None	9%

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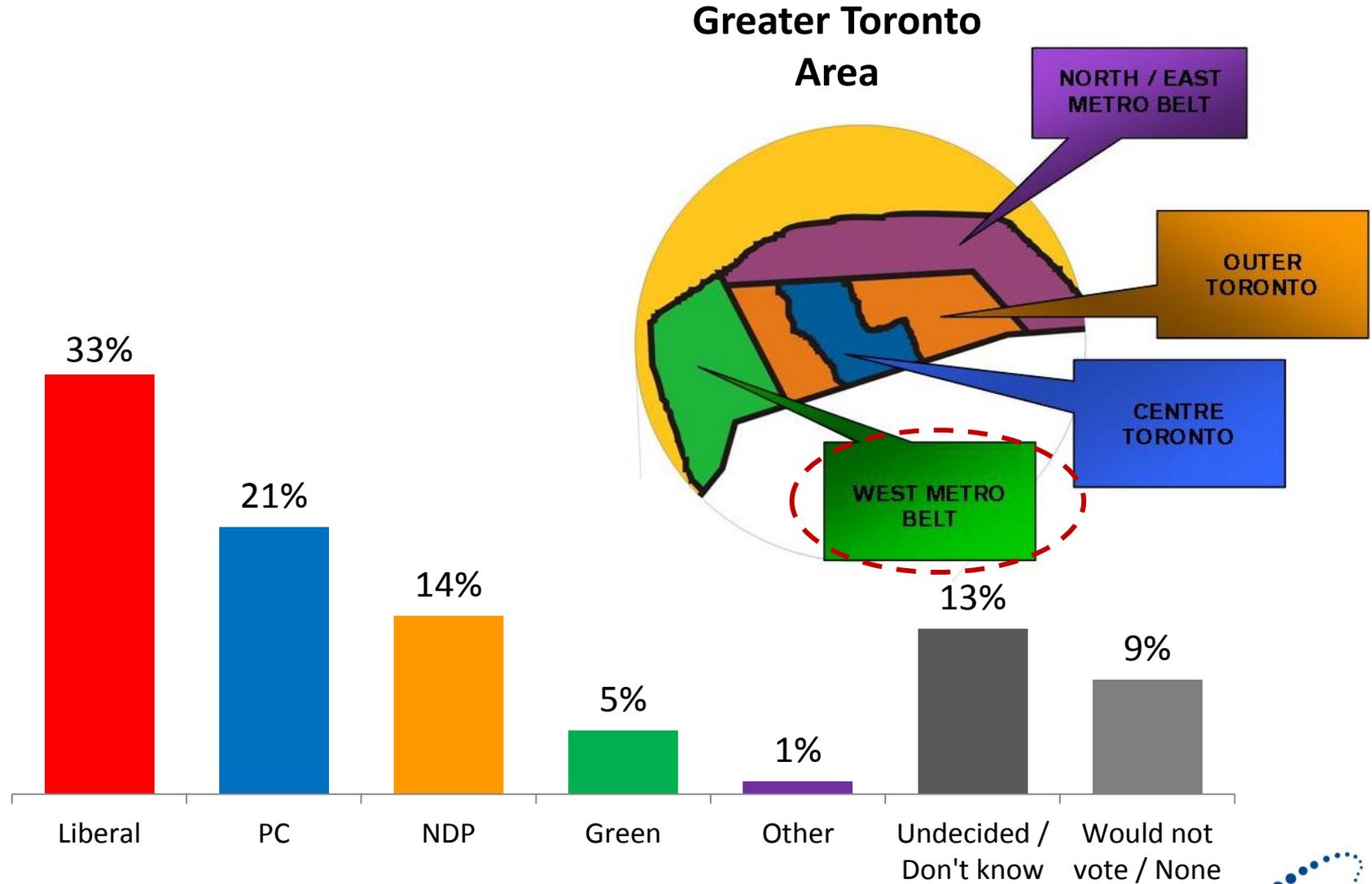
Vote Intent by Region: North/East Metro Belt
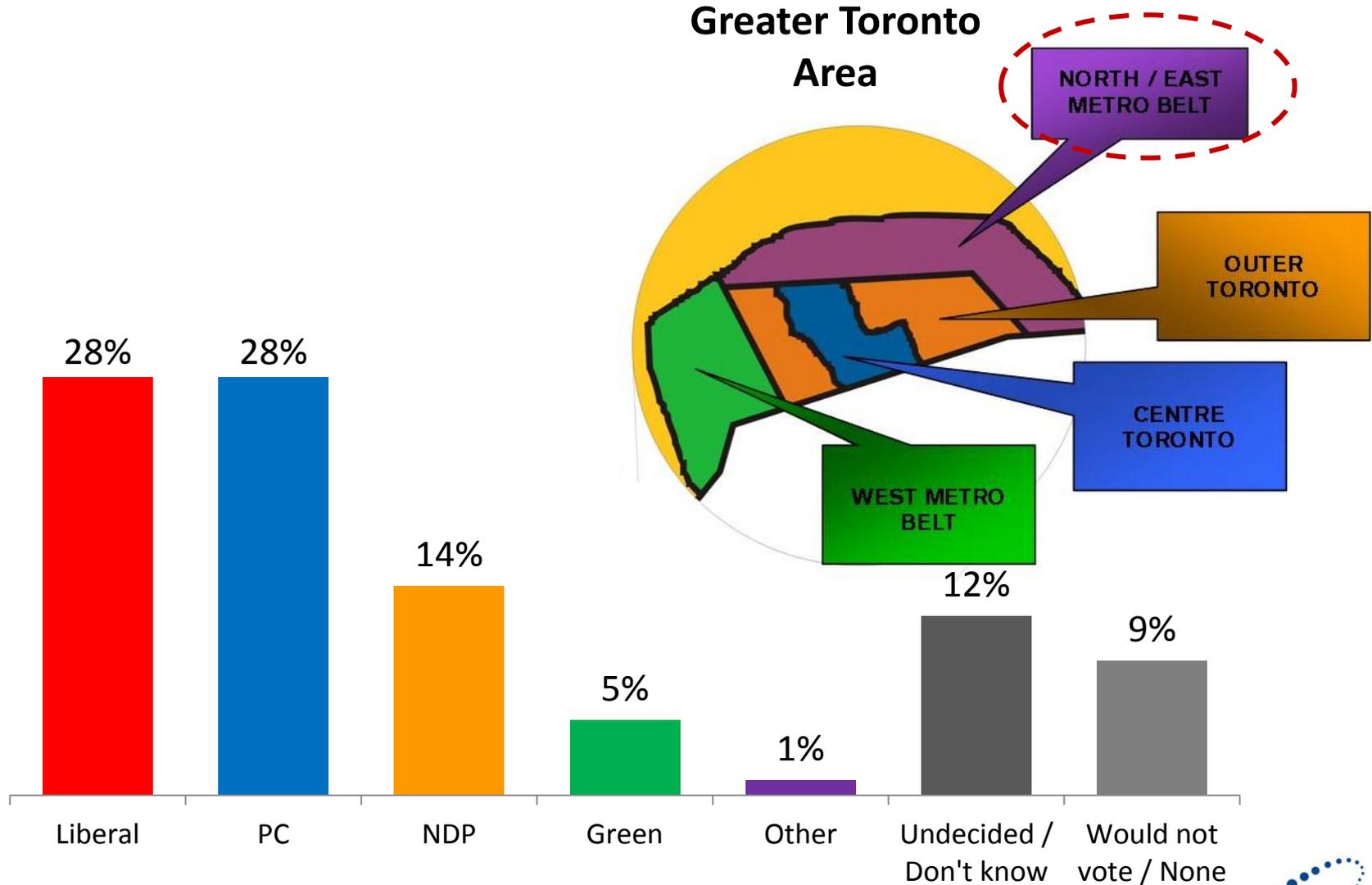
Vote Intent by Region: Ontario South Central
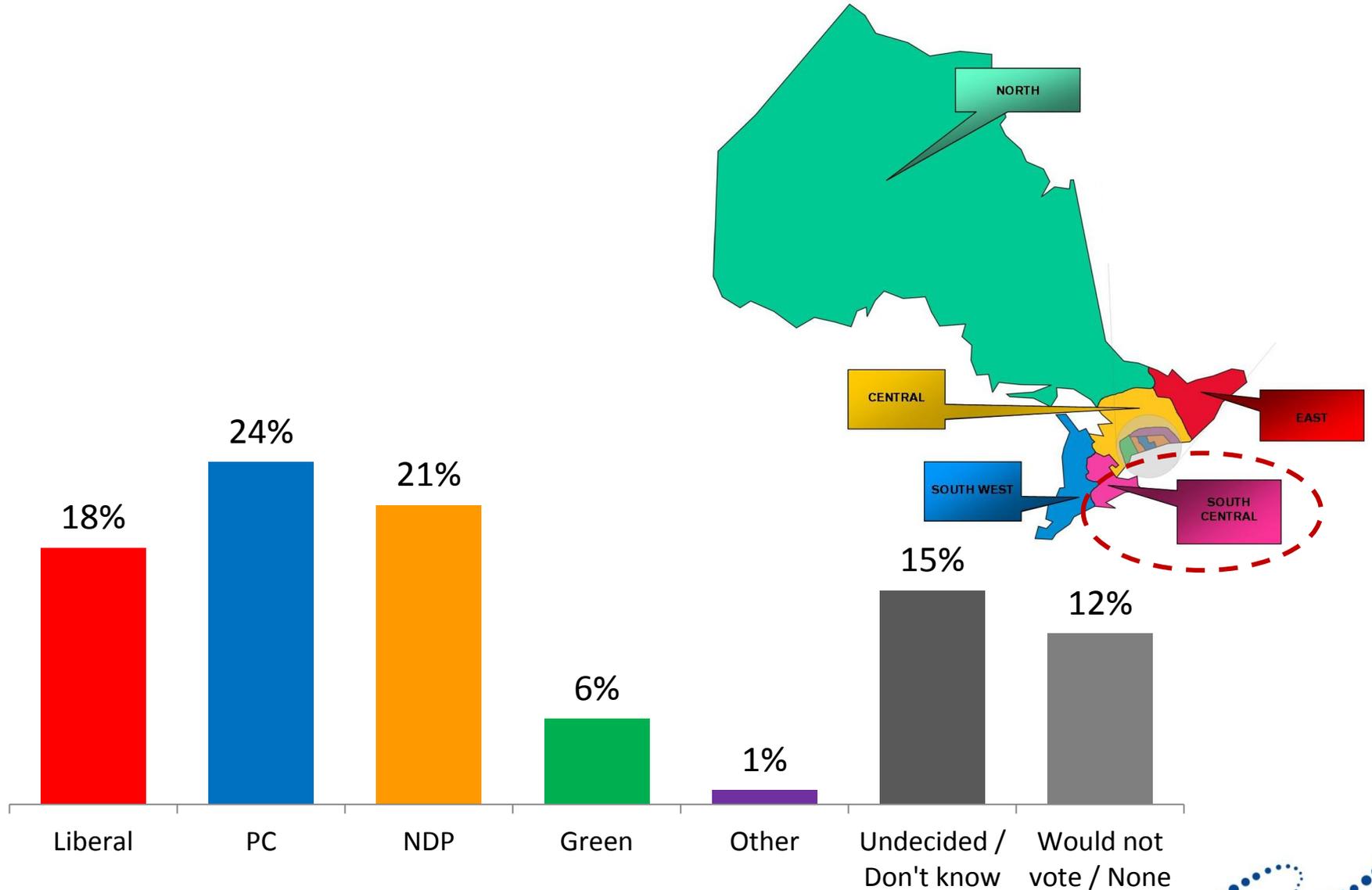
Vote Intent by Region: Ontario South West
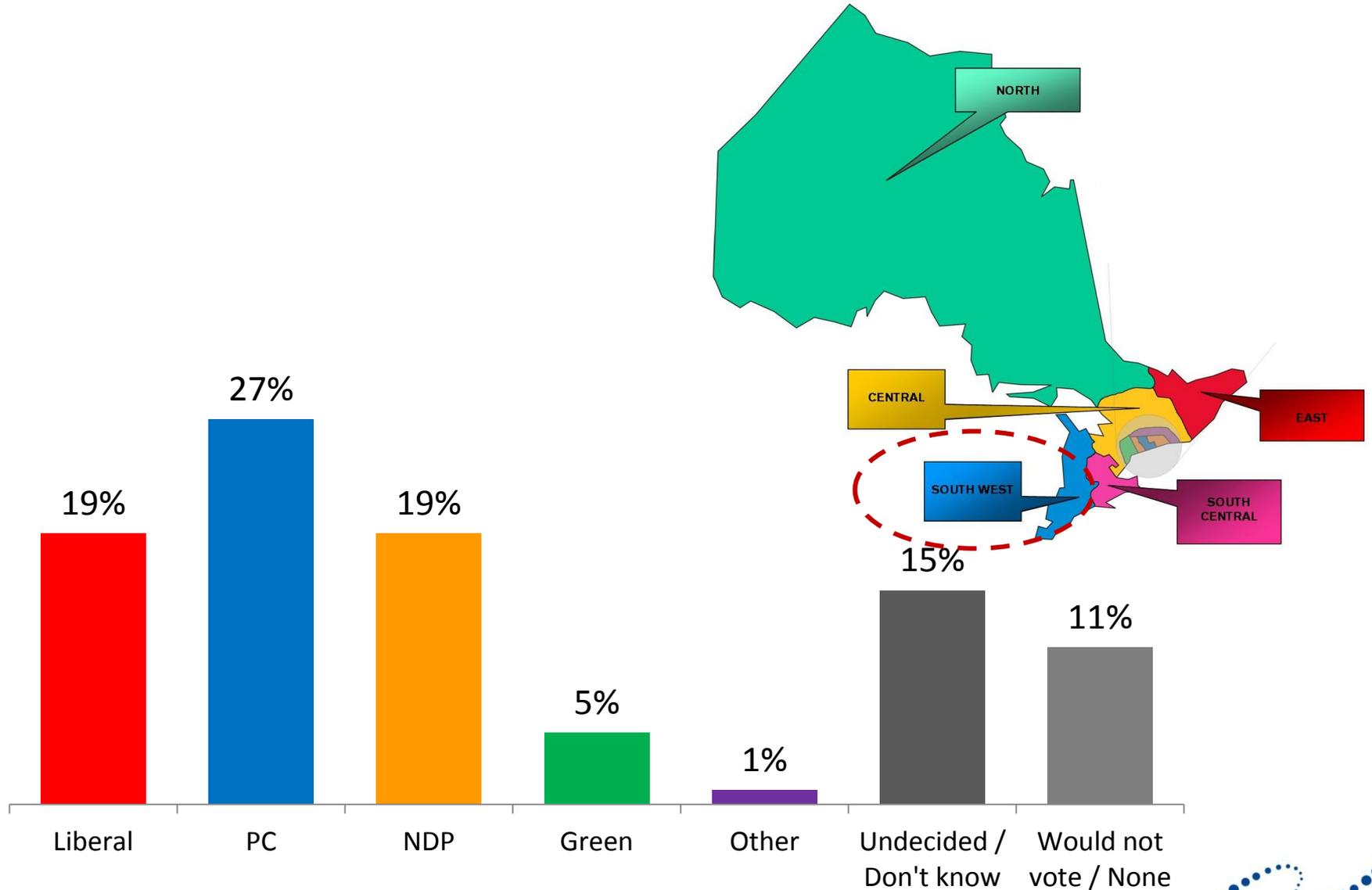
Vote Intent by Region: Central Ontario

- Liberal: 26%
- PC: 24%
- NDP: 15%
- Green: 6%
- Other: 1%
- Undecided / Don't know: 15%
- Would not vote / None: 8%

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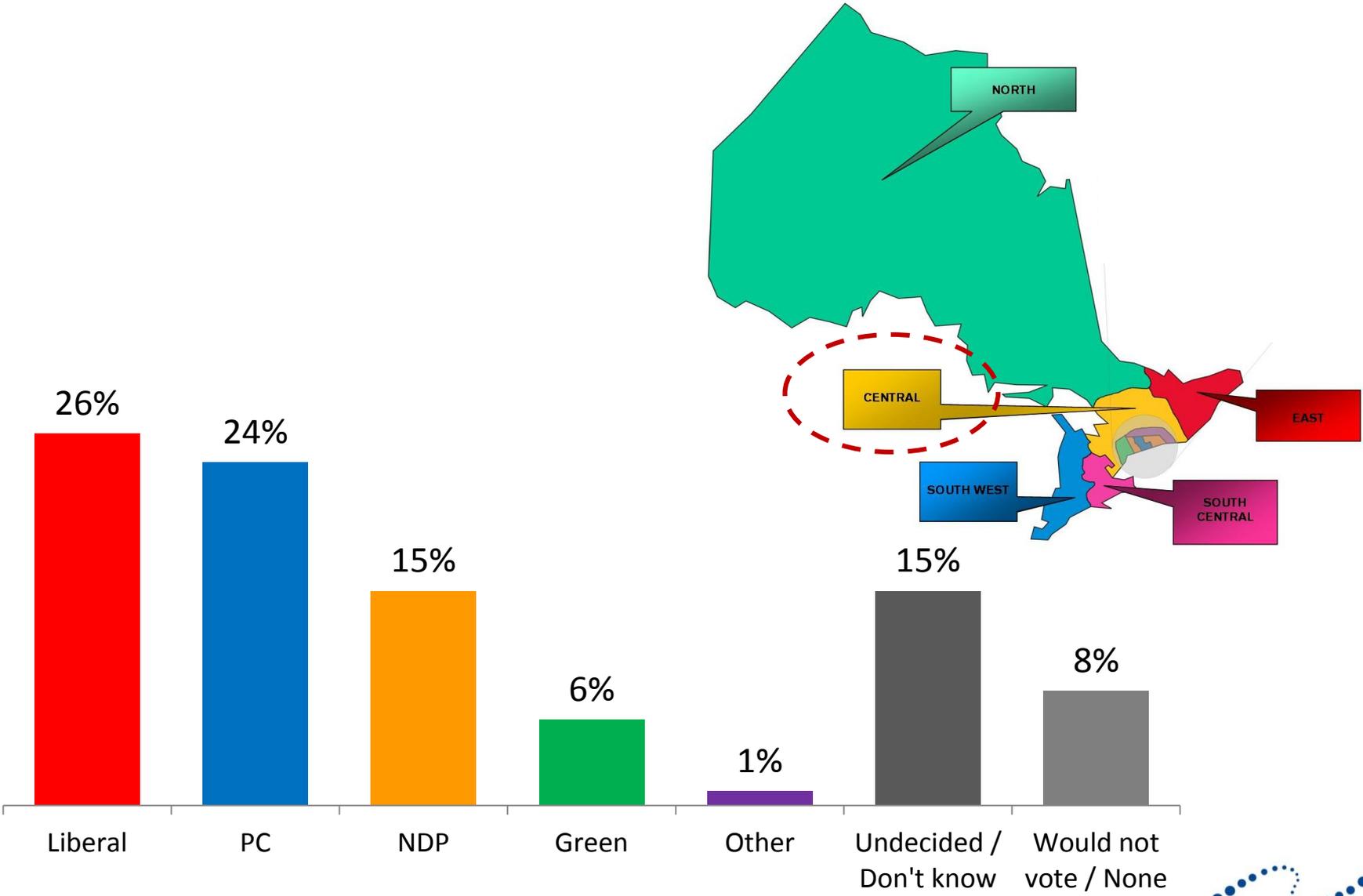
Vote Intent by Region: Eastern Ontario
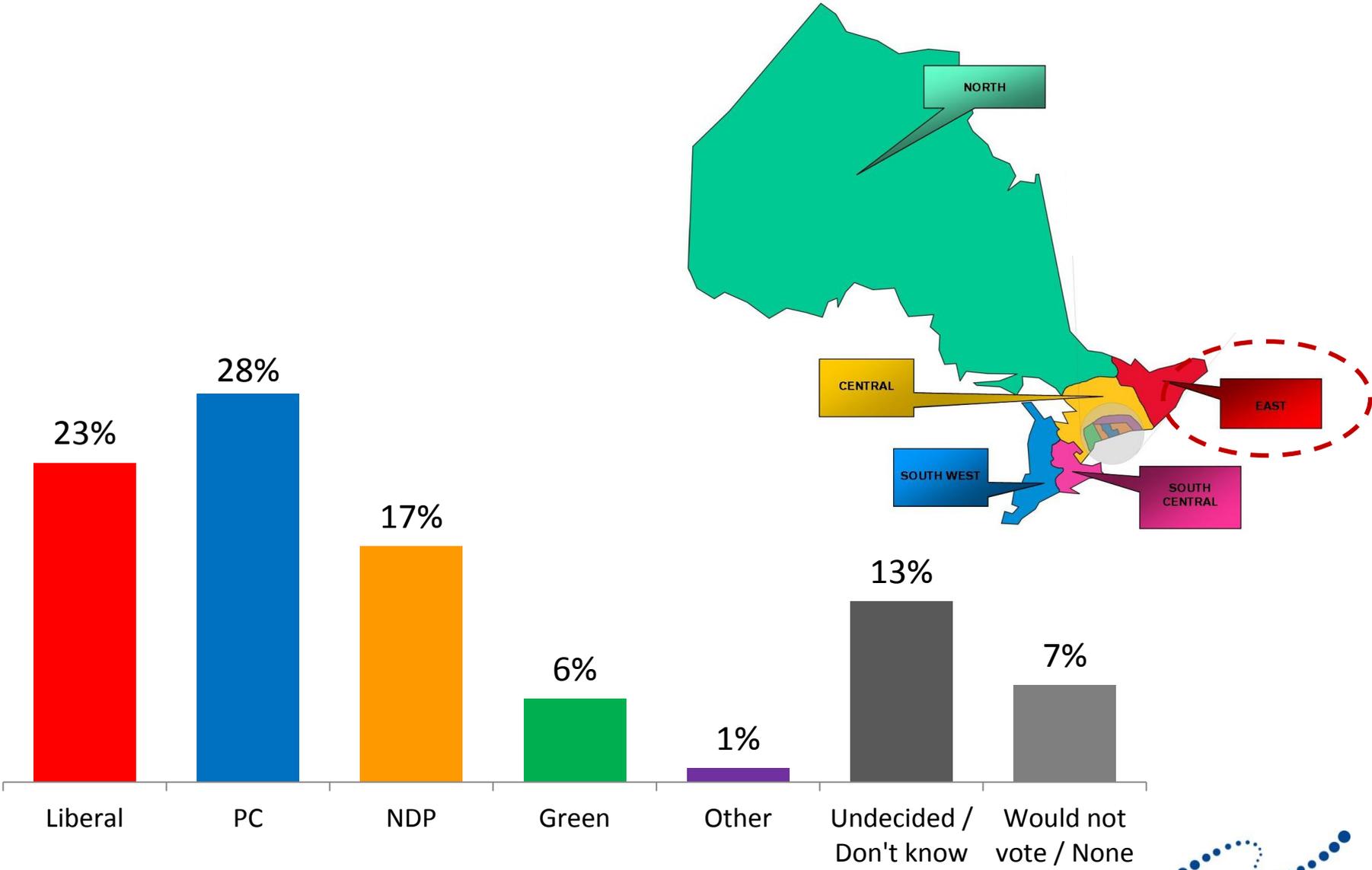
Vote Intent by Region: Northern Ontario
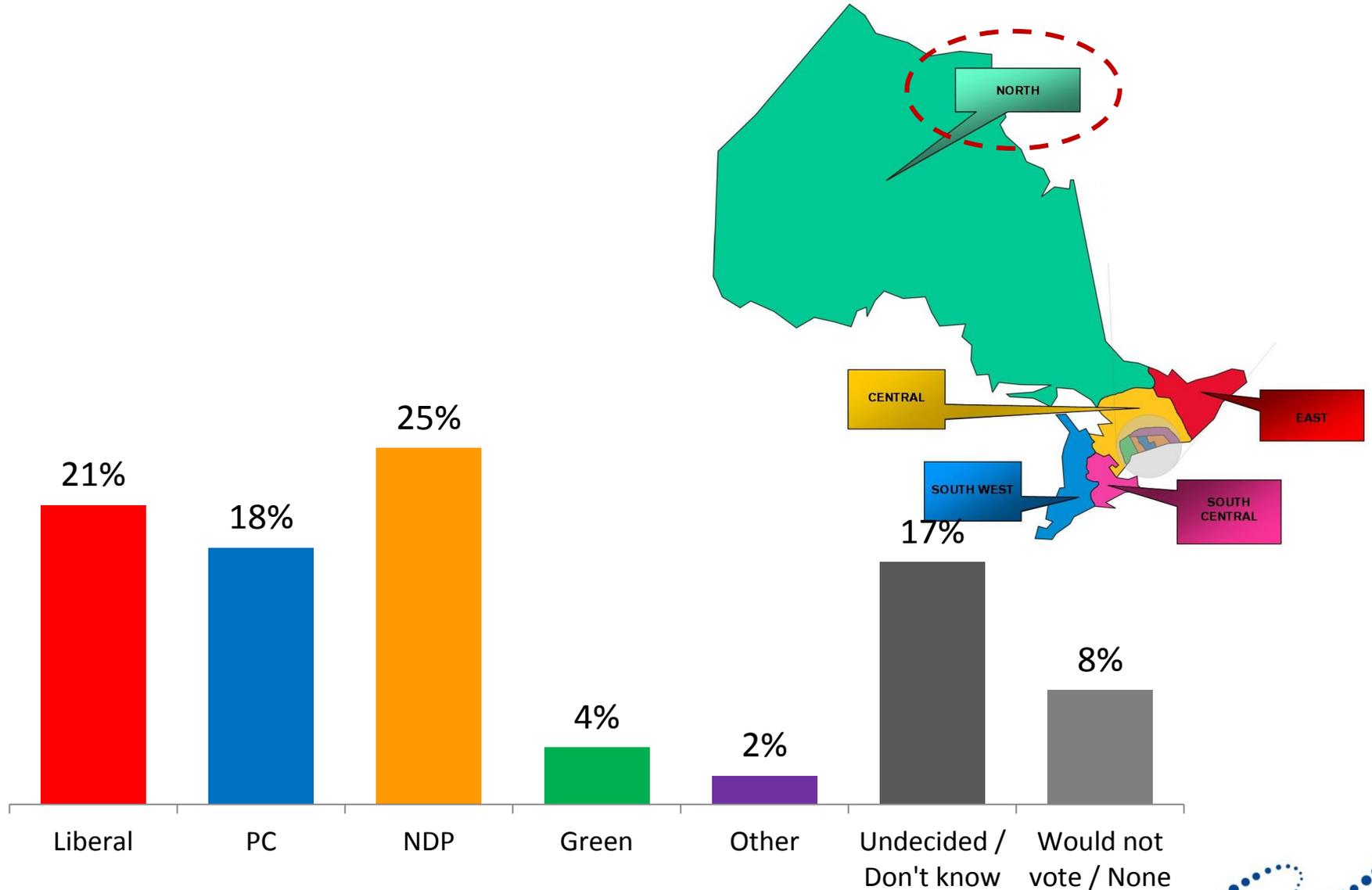
Target Audiences

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

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Vote by Vote Battleground

	Core Libs	Liberal/ NDP Swing	Core NDP	Tory/NDP Swing	Core Tories	Liberal/ Tory Swing	Unaligned
Liberal	100%	55%				54%	
PC				60%	100%	46%	
NDP		45%	100%	40%			
Green							32%
Would Not Vote							15%
Undecided							47%

Voter Conflict Segments

Hostile
23%

Core Liberals
26%

Soft Liberals
7%

Time for
Change
Liberals
14%

Uncertain
6%

Soft anti-
Liberals
23%

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Vote by Voter Conflict Segments

	Core Libs	Soft Libs	Time4Ch Libs	Uncertain	Soft anti-Libs	Hostile
Liberal	70%	52%	38%	10%	4%	1%
PC	8%	5%	17%	11%	26%	60%
NDP	12%	8%	27%	7%	29%	19%
Green	2%	2%	4%	0%	6%	3%
Would Not Vote	0%	11%	1%	14%	7%	9%
Undecided	8%	22%	14%	54%	19%	6%

Value Clusters
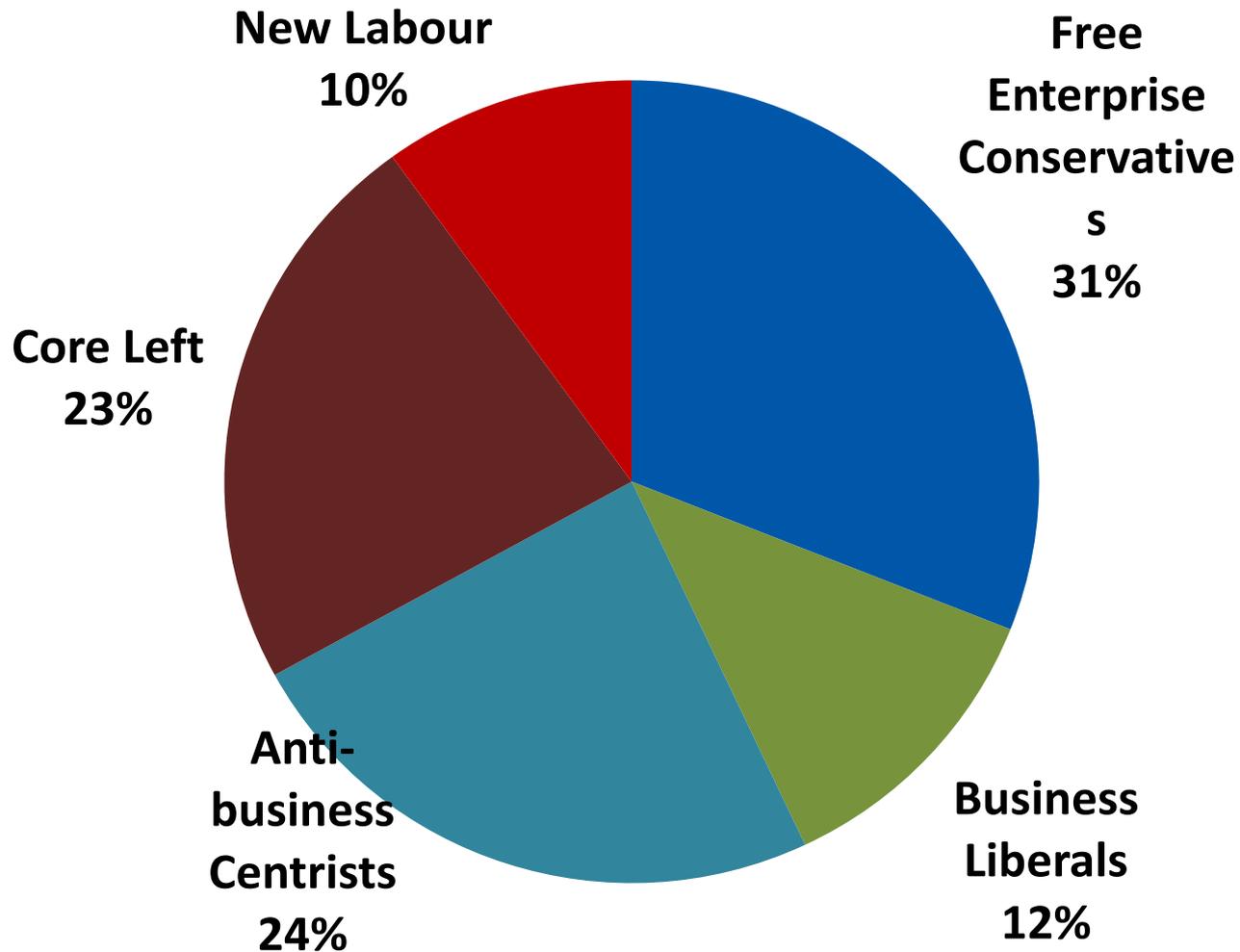
Attitudinal Table

	Free Enterprise Conservatives	Business Liberals	Anti-business Centrists	Core Left	New Labour
Role of government when it comes to economy: **Gov't needs to be an active partner**	**28%**	**88%**	**38%**	**67%**	**43%**
It is important for the government to: **Create opportunities so everyone can compete**	**95%**	**96%**	**72%**	**0%**	**0%**
Do you think the profit system: **Brings out the worst in human nature**	**0%**	**0%**	**74%**	**90%**	**0%**
When gov'ts make decisions on spending on programs, do you think they should base their decisions on: **Their ability to afford the programs**	**81%**	**0%**	**24%**	**18%**	**34%**
When it comes to government decision making…: **Too often the gov't listens to experts instead of common sense**	**65%**	**57%**	**55%**	**53%**	**64%**
Be open to ideas from all viewpoints (vs focus ideas based on fundamental truths)	**62%**	**81%**	**62%**	**74%**	**64%**

Vote by Cluster

	Free Enterprise Conservatives	Business Liberals	Anti-business Centrists	Core Left	New Labour
PC	**57%**	**13%**	**17%**	**9%**	**19%**
Liberal	**21%**	**45%**	**29%**	**38%**	**32%**
NDP	**10%**	**26%**	**25%**	**34%**	**27%**
Other	**3%**	**7%**	**6%**	**13%**	**8%**
Undecided/WNV	**9%**	**10%**	**23%**	**6%**	**14%**

What Issues Matter to Whom?

Honest and accountable government 'absolutely critical' to more 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?
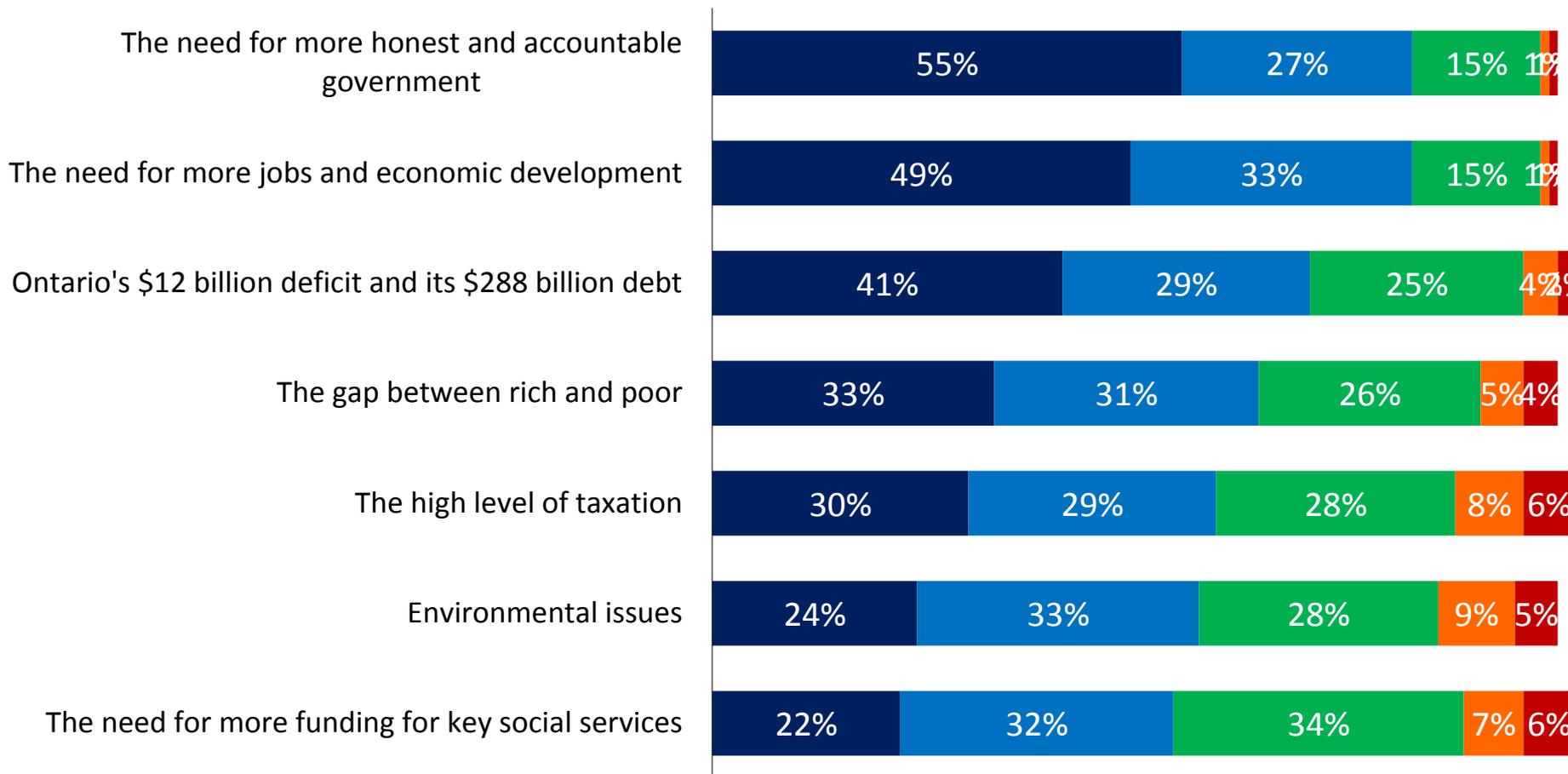
Issue	Absolutely Critical (9 to 10)	Somewhat critical (7 to 8)	Somewhat important (4 to 6)	Not very important (2 to 3)	Not important at all (0 to 1)
The need for more honest and accountable government	55%	27%	15%	1%	1%
The need for more jobs and economic development	49%	33%	15%	1%	1%
Ontario's $12 billion deficit and its $288 billion debt	41%	29%	25%	4%	2%
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 outranks 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%

■ Most important   ■ Second most important

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Who Cares: Priority Issues by Value Cluster

% ranking each issue "Most Important"

	Free Enterprise Conservatives	Business Liberals	Anti-business Centrists	Core Left	New Labour
Ontario's $12 billion deficit and its $288 billion debt	34%	15%	13%	6%	14%
The need for more jobs and economic development	23%	37%	35%	25%	25%
The gap between rich and poor	2%	7%	10%	29%	16%
The need for more funding for key social services	3%	5%	8%	13%	5%
The high level of taxation	16%	7%	9%	3%	11%
Environmental issues	3%	11%	7%	10%	6%
The need for more honest and accountable government	19%	18%	17%	14%	22%

What is the Impact: Vote by Issue Priority

% vote among those who ranked each issue as "Most Important"

	Liberal	PC	NDP	Green	Unaligned
Ontario's $12 billion deficit and its $288 billion debt	27%	46%	13%	2%	12%
The need for more jobs and economic development	42%	20%	19%	4%	16%
The gap between rich and poor	37%	12%	25%	7%	19%
The need for more funding for key social services	36%	6%	32%	4%	22%
The high level of taxation	25%	41%	14%	2%	18%
Environmental issues	42%	9%	22%	16%	11%
The need for more honest and accountable government	21%	29%	28%	4%	17%

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The Parties

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		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 Ontario Liberals have their problems, but they are still the best party to form government	15% / 31% / 3% / 20% / 25%	**1%**
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%	**-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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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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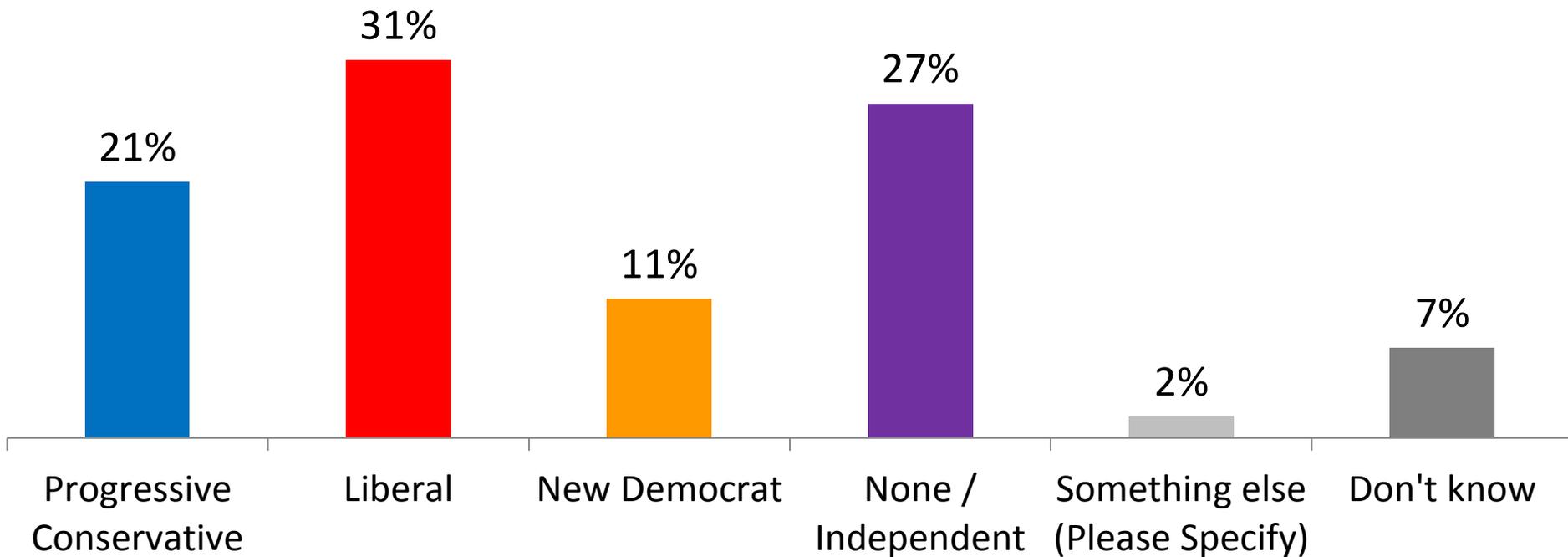
NDP and PC retaining over 80% of their traditional vote, but Liberals have just 65%

Q **Vote by Party ID**

	Party ID – PC	Party ID – Liberal	Party ID – NDP	Party ID- Other	Independent /Undecided
PC	**80%**	8%	3%	30%	16%
Liberal	8%	**65%**	7%	10%	20%
NDP	4%	10%	**80%**	10%	19%
Other	2%	1%	6%	20%	7%
Independent/ Undecided/WNV	7%	14%	4%	10%	35%

Note: 'Refused' not shown

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Liberals have no issues to pull their vote up but education and economy their strongest suits

Q Now we are going to provide you with a list of issues. For each of these issues, please tell me 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…?

Issue	Liberals much better	Liberals somewhat better
Education	11%	17%
The economy	9%	18%
Having a vision for the future	10%	14%
Health	8%	15%
Protecting women's rights	10%	12%
Deliver results that will make things better for…	9%	13%
Balancing the budget	7%	14%
Understanding the needs of people like me	9%	12%
Crime	6%	12%
Environment	6%	11%
Maintaining a high ethical standard	8%	9%
Cutting taxes	5%	7%

Liberal ID 31%

■ Liberals much better   ■ Liberals somewhat better

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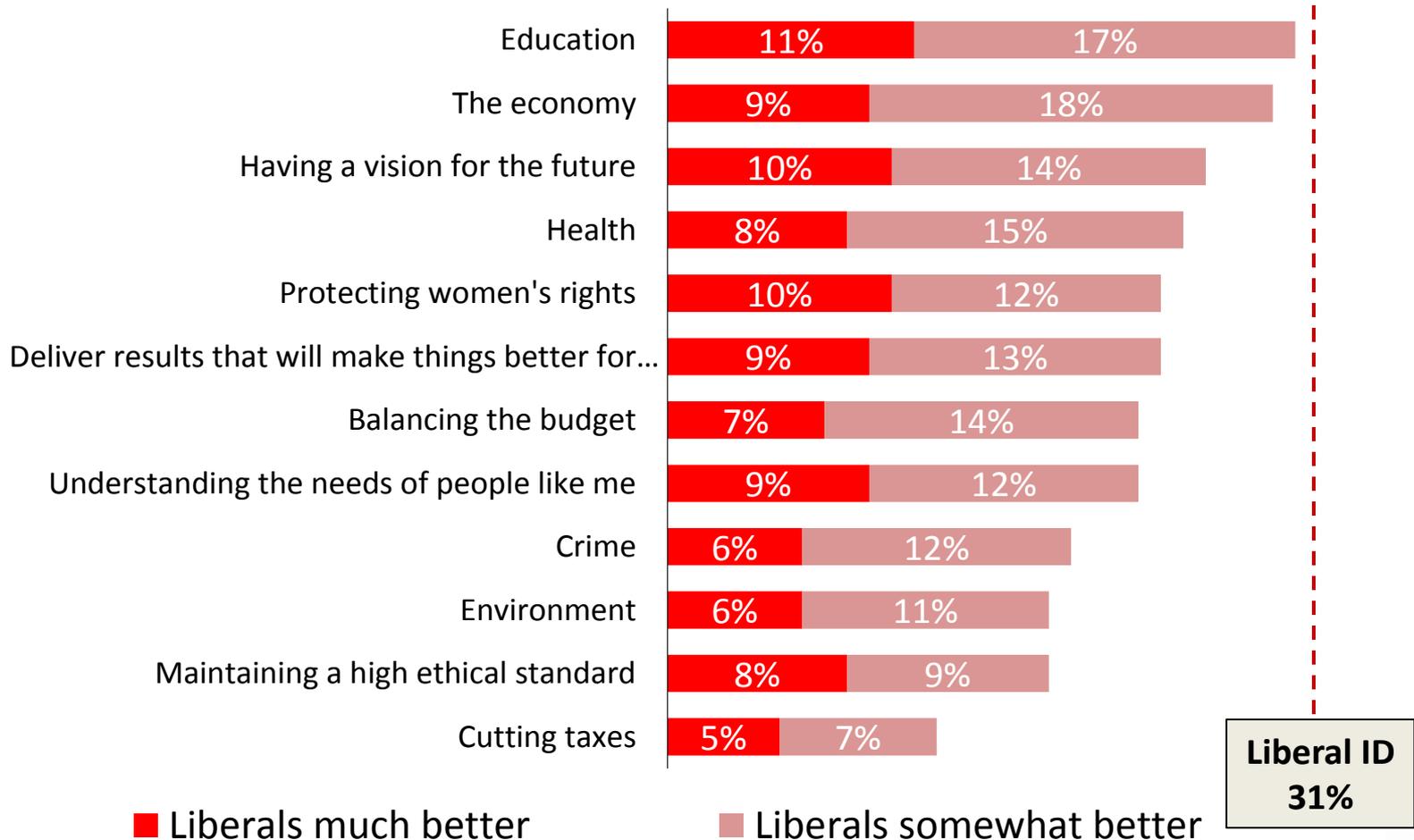
PCs gain support on fiscal issues, the economy and crime

Q Now we are going to provide you with a list of issues. For each of these issues, please tell me 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...?

Issue	PC much better	PC somewhat better
Cutting taxes	17%	14%
Balancing the budget	18%	13%
The economy	16%	11%
Crime	15%	10%
Deliver results that will make things better for…	13%	7%
Having a vision for the future	12%	8%
Understanding the needs of people like me	11%	7%
Education	9%	8%
Health	10%	7%
Maintaining a high ethical standard	9%	6%
Environment	7%	5%
Protecting women's rights	6%	3%

Progressive Conservative ID 21%

■ PC much better   ■ PC somewhat better

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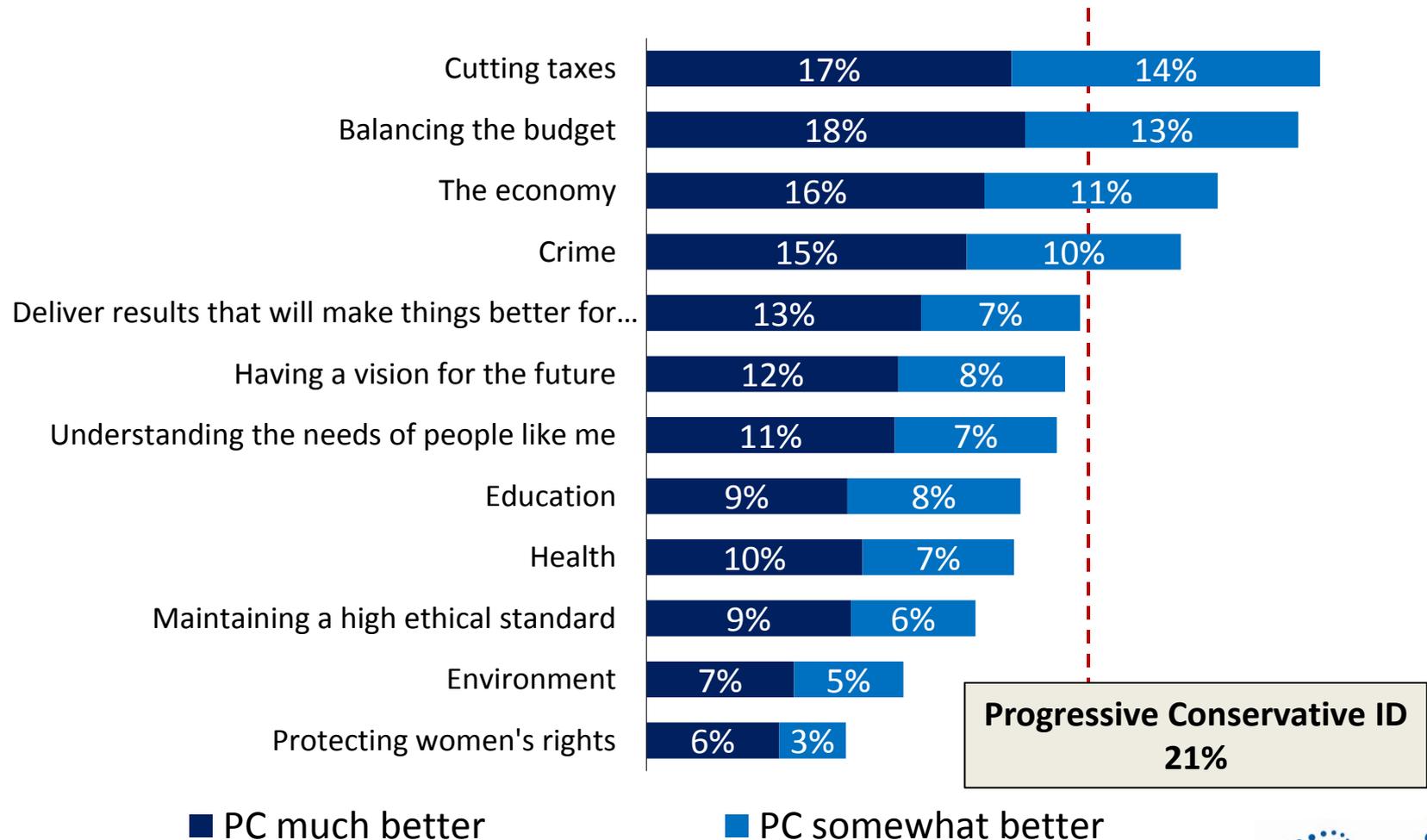# NDP are ahead of Party ID on almost all issues. Weakest on fiscal issues, the economy and crime.

Q Now we are going to provide you with a list of issues. For each of these issues, please tell me 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...?

NDP ID 11%

Issue	NDP much better	NDP somewhat better
Protecting women's rights	16%	15%
Environment	14%	16%
Health	14%	13%
Understanding the needs of people like me	14%	12%
Maintaining a high ethical standard	11%	11%
Deliver results that will make things better for…	11%	10%
Education	10%	11%
Having a vision for the future	9%	10%
Cutting taxes	7%	8%
The economy	8%	7%
Crime	7%	6%
Balancing the budget	6%	5%

■ NDP much better   ■ NDP somewhat better

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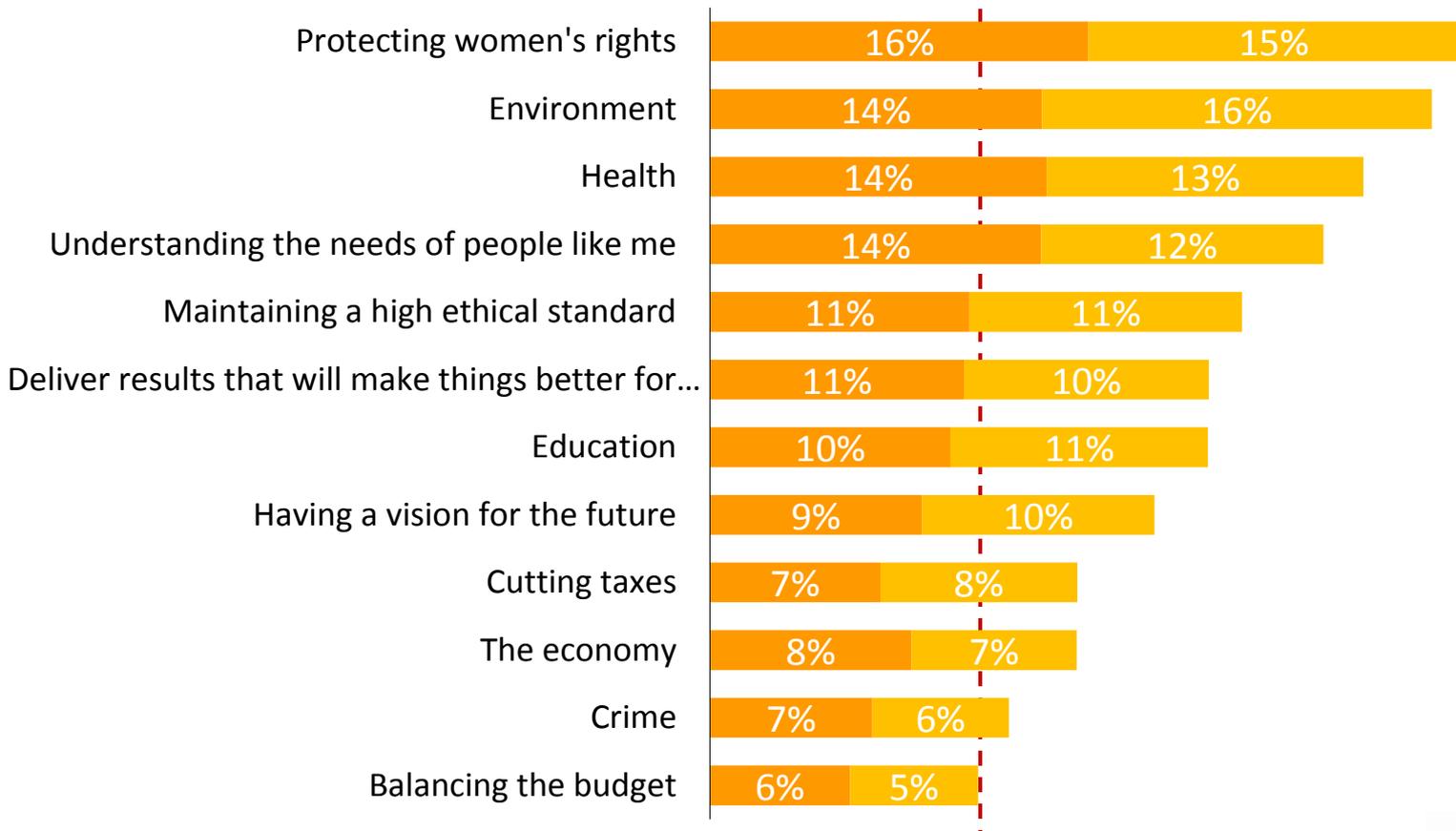
Leader Image

Hudak seen as unfavourable by almost a majority; Wynne as higher favourables and unfavourables than Horwath
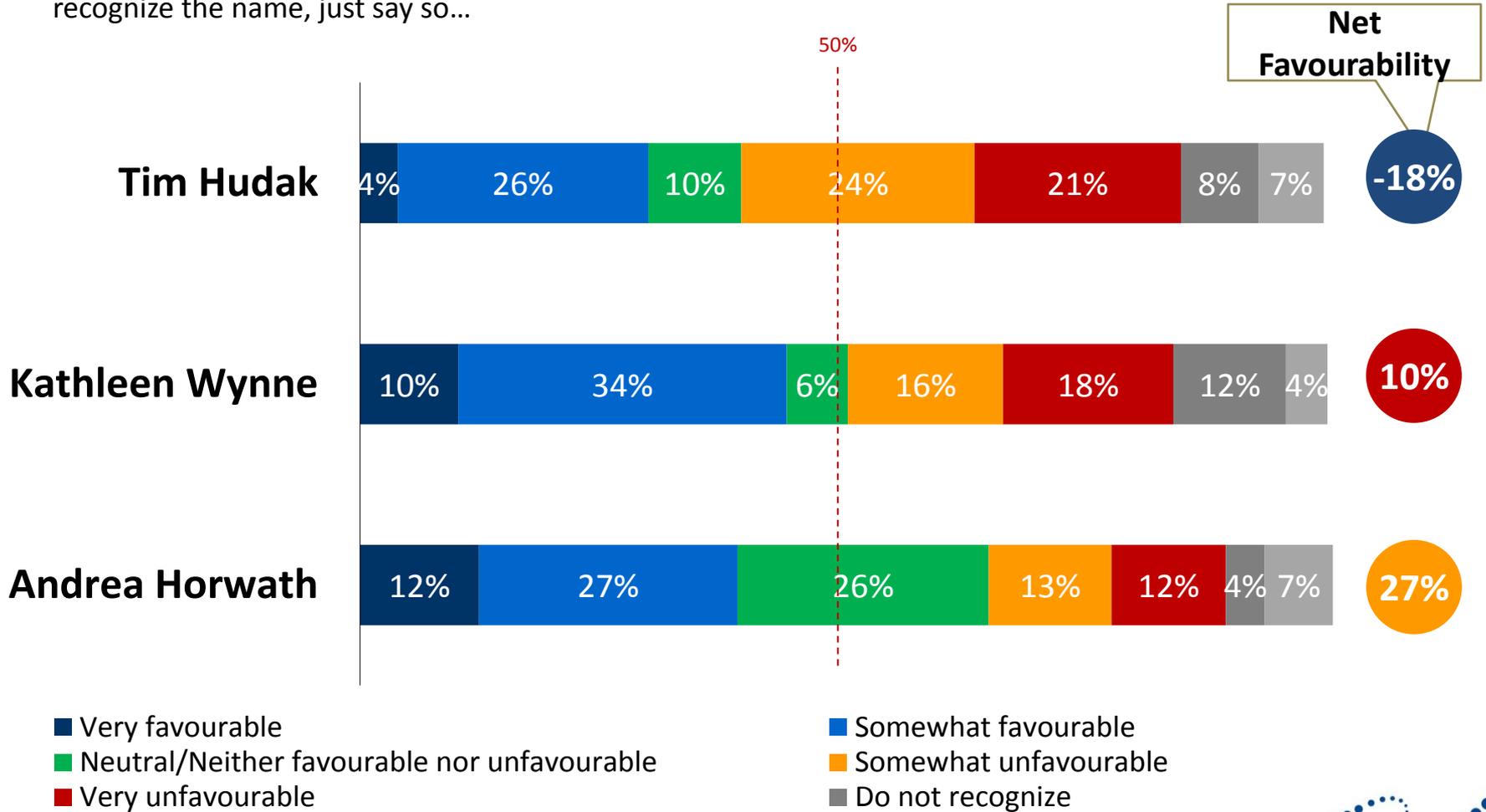
Q Now, I would like to read you the names of several individuals who have been mentioned in the news recently. For each one, please tell me whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just say so…

Net Favourability

50%

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
- ■ Somewhat favourable
- ■ Neutral/Neither favourable nor unfavourable
- ■ Somewhat unfavourable
- ■ Very 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?

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

Tim Hudak: 20%, 18%, 20%, 18%, **18%**

McGuinty/ Wynne: 19%, 25%, 25%, 22%, **27%**

Andrea Horwath: 21%, 13%, 16%, 18%, **18%**

Other: 1%, 1%, 1%, 0%, **1%**

None of the above: 11%, 7%, 13%, 11%, **7%**

Undecided/Don't know: 26%, 34%, 25%, 28%, **26%**
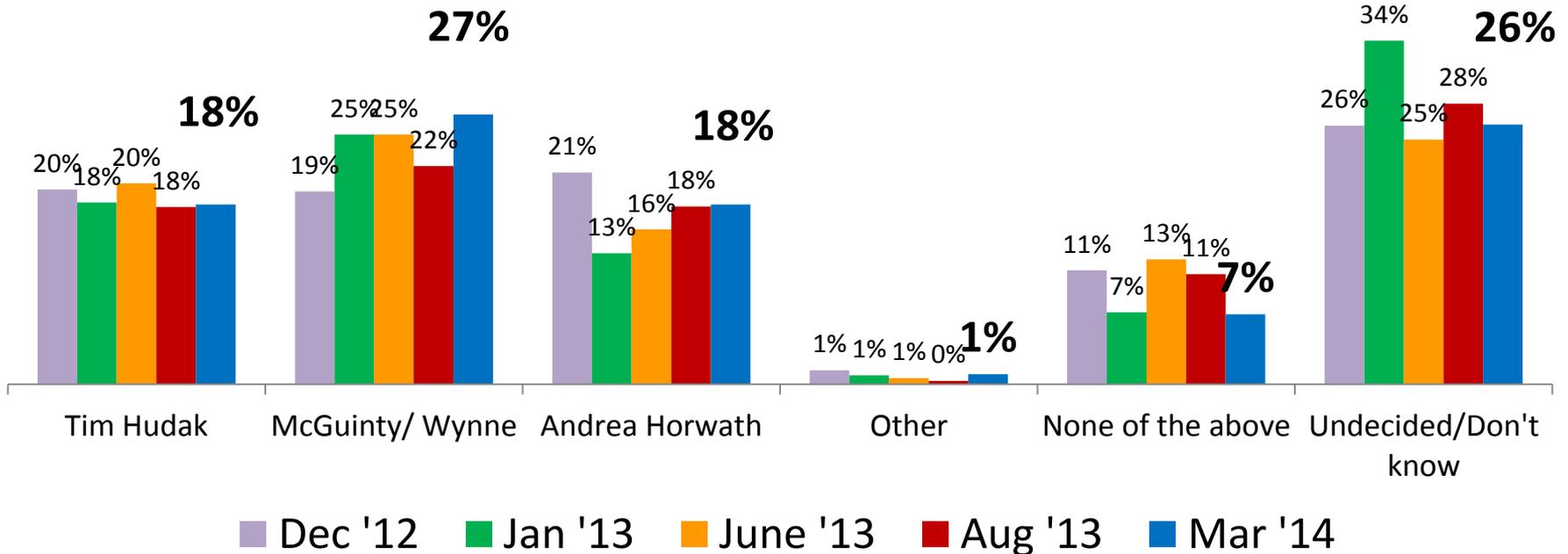
Note: 'Refused' / "would not vote" not shown

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Wynne leads on 'strong leadership', Horwath strongest on 'cares about people like me'

Q Does "[*insert item*]" best describe…

Traits
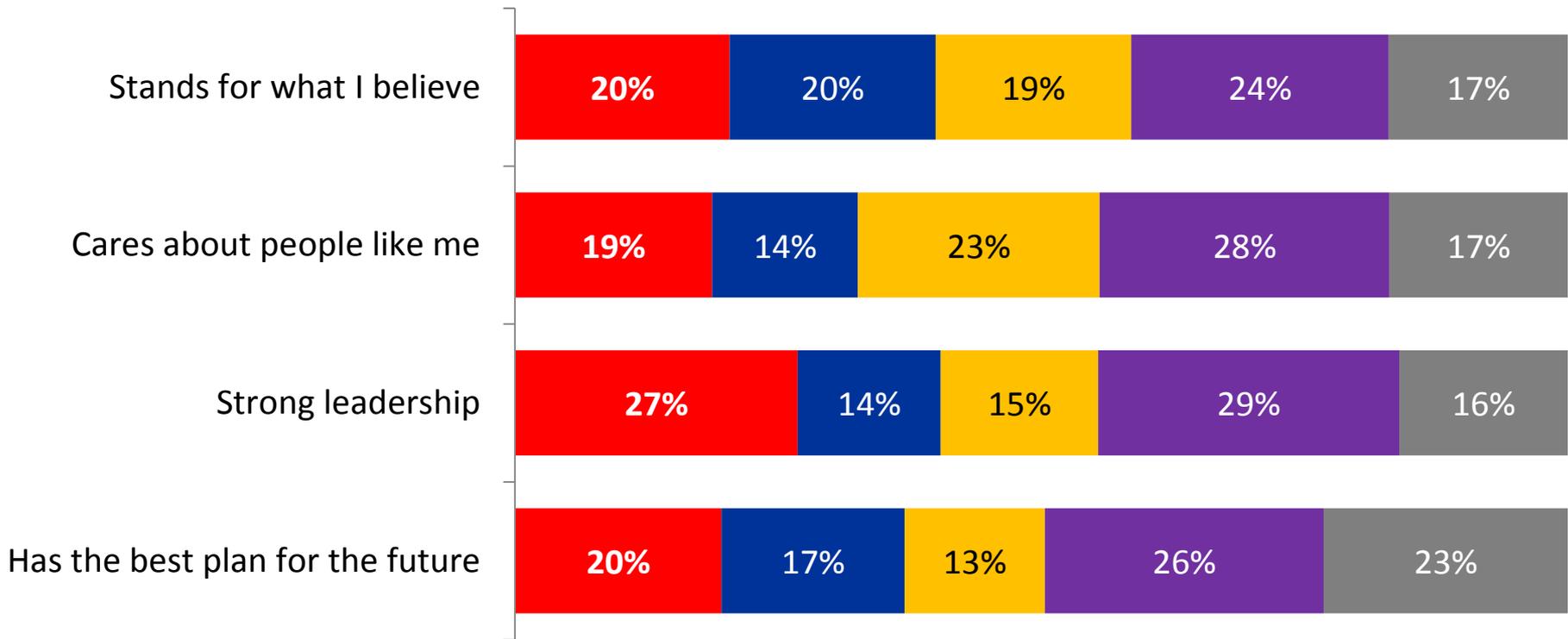
Trait	Kathleen Wynne, Liberal	Tim Hudak, PC	Andrea Horwath, NDP	None of them stand out	Don't Know
Stands for what I believe	20%	20%	19%	24%	17%
Cares about people like me	19%	14%	23%	28%	17%
Strong leadership	27%	14%	15%	29%	16%
Has the best plan for the future	20%	17%	13%	26%	23%

■ Kathleen Wynne, Liberal   ■ Tim Hudak, PC   ■ Andrea Horwath, NDP
■ None of them stand out   ■ Don't Know

Note: 'Refused' not shown

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Campaign Positions

(Aging Population and Transportation Infrastructure) "Ontario has fared reasonable well despite challenges like the financial downturn, but there are some key gaps we need to address. With our aging population, government must takes step now to ensure people have the income they need in retirement. With our aging transportation infrastructure, government needs to make investments now to improve public transit and our roads and highways."

Net More Likely to Support
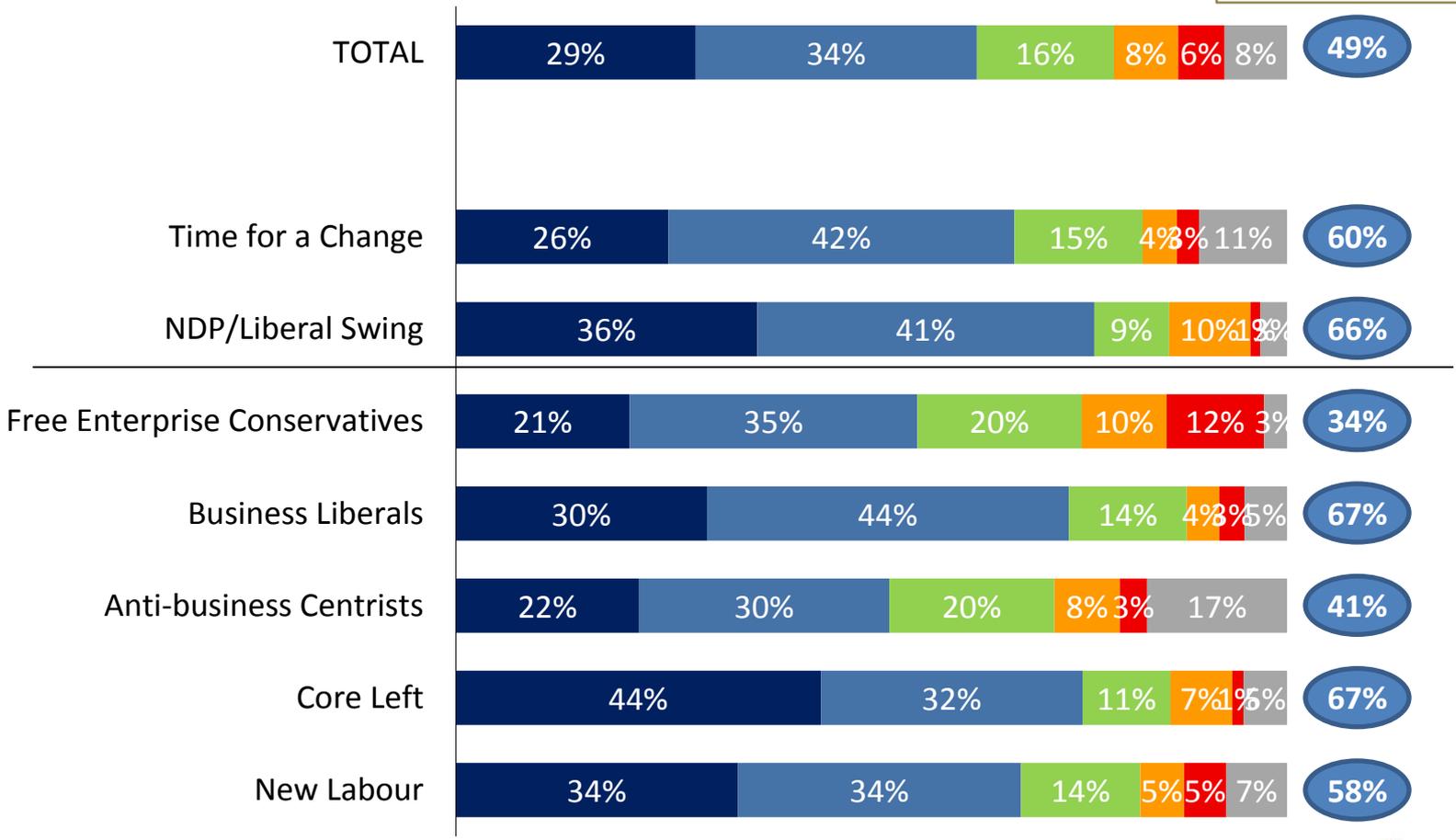
	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely			Net More Likely to Support
TOTAL	29%	34%	16%	8%	6%	8%	49%
Time for a Change	26%	42%	15%	4%	3%	11%	60%
NDP/Liberal Swing	36%	41%	9%	10%	1%	2%	66%
Free Enterprise Conservatives	21%	35%	20%	10%	12%	3%	34%
Business Liberals	30%	44%	14%	4%	3%	5%	67%
Anti-business Centrists	22%	30%	20%	8%	3%	17%	41%
Core Left	44%	32%	11%	7%	1%	5%	67%
New Labour	34%	34%	14%	5%	5%	7%	58%

■ Much more likely   ■ Somewhat more likely
■ Neither more nor less   ■ Somewhat less likely

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(We Need Steady, Experienced Leadership) "Ontario is facing many challenges in these
turbulent times but things are better here than in many other places. What we need now is
steady, experienced leadership that will make incremental improvements without jeopardizing
the things that are going right. We can not afford to pursue dramatic changes that may well
end up doing more harm than good."

	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely	(red)	(grey)	Net More Likely to Support
TOTAL	20%	29%	23%	9%	10%	9%	31%
Time for a Change	25%	38%	20%	7%	3%	7%	52%
NDP/Liberal Swing	21%	46%	18%	6%	3%	6%	58%
Free Enterprise Conservatives	17%	25%	24%	13%	18%	3%	12%
Business Liberals	26%	37%	17%	12%	3%	5%	49%
Anti-business Centrists	18%	27%	24%	6%	5%	20%	34%
Core Left	23%	30%	22%	9%	8%	7%	36%
New Labour	22%	37%	22%	5%	9%	5%	45%

■ Much more likely   ■ Somewhat more likely
■ Neither more nor less   ■ Somewhat less likely
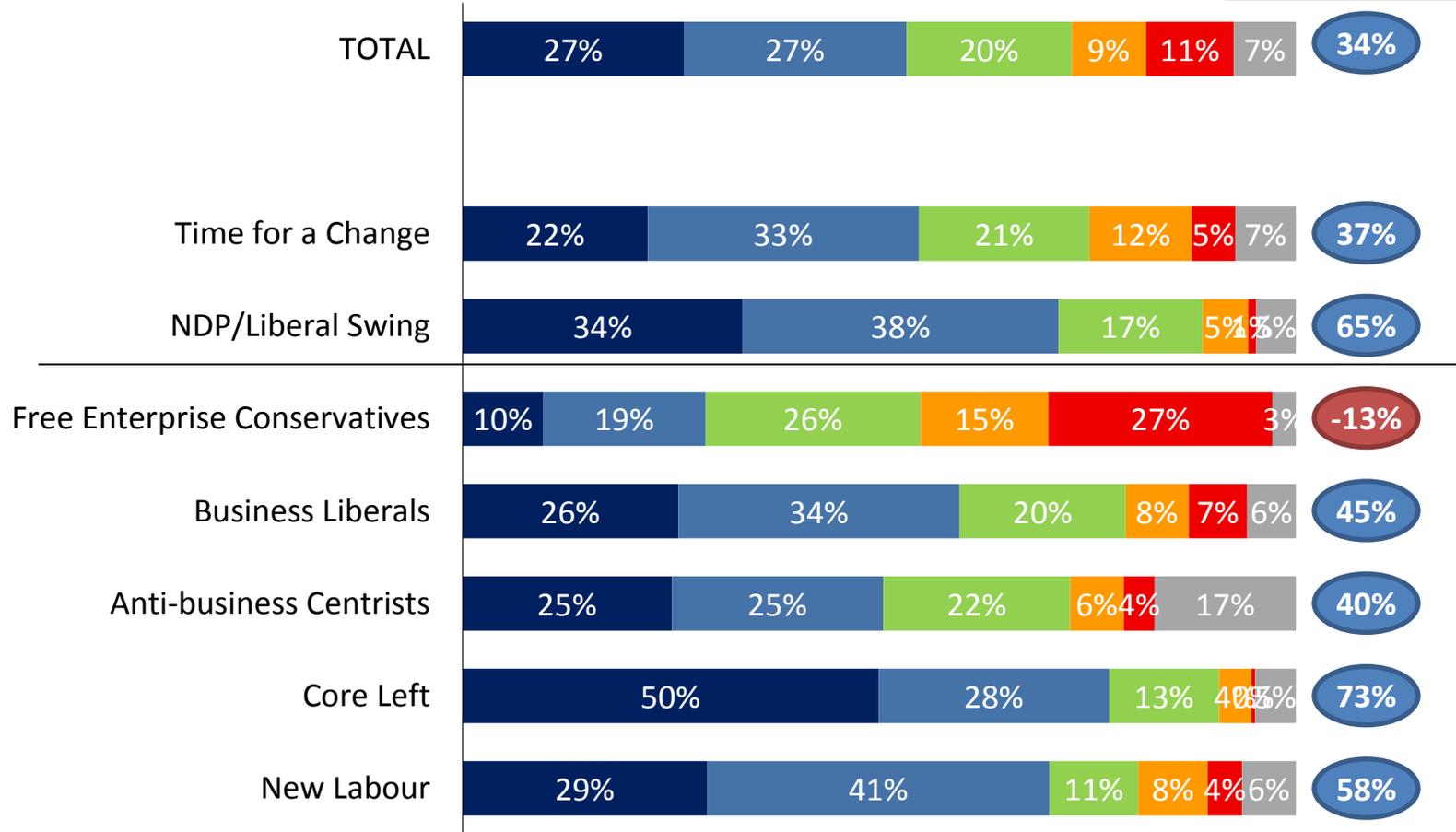
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(Government is Tired and Has Run Out of Ideas) "The Ontario government is tired and has run out of ideas. High perks and pay to government insiders and scandals such as the gas plant controversy, eHealth, and the **ORNGE** air ambulance mismanagement show the Liberal government has lost touch with the public and needs to be replaced."

	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely	Much less likely	(grey)	Net More Likely to Support
TOTAL	25%	20%	20%	11%	13%	10%	22%
Time for a Change	12%	31%	29%	8%	10%	9%	25%
NDP/Liberal Swing	6%	26%	27%	16%	20%	5%	-5
Free Enterprise Conservatives	44%	21%	19%	5%	9%	3%	50%
Business Liberals	17%	22%	25%	13%	15%	8%	11%
Anti-business Centrists	17%	21%	20%	11%	10%	21%	16%
Core Left	16%	14%	24%	14%	22%	10%	-6
New Labour	23%	28%	11%	18%	11%	9%	23%

- ■ Much more likely
- ■ Somewhat more likely
- ■ Neither more nor less
- ■ Somewhat less likely

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(Reduce the Growing Gap Between Rich and Poor) "The Ontario government needs to take immediate action to reduce the growing gap between rich and poor. Businesses and people with higher incomes have not been paying their fair share. We need to increase their taxes so government can do more to help the disadvantaged get ahead in life. Those new taxes should also be used to increase funding to education and training so young people can get the education and skills they need without piling up a mountain of debt."
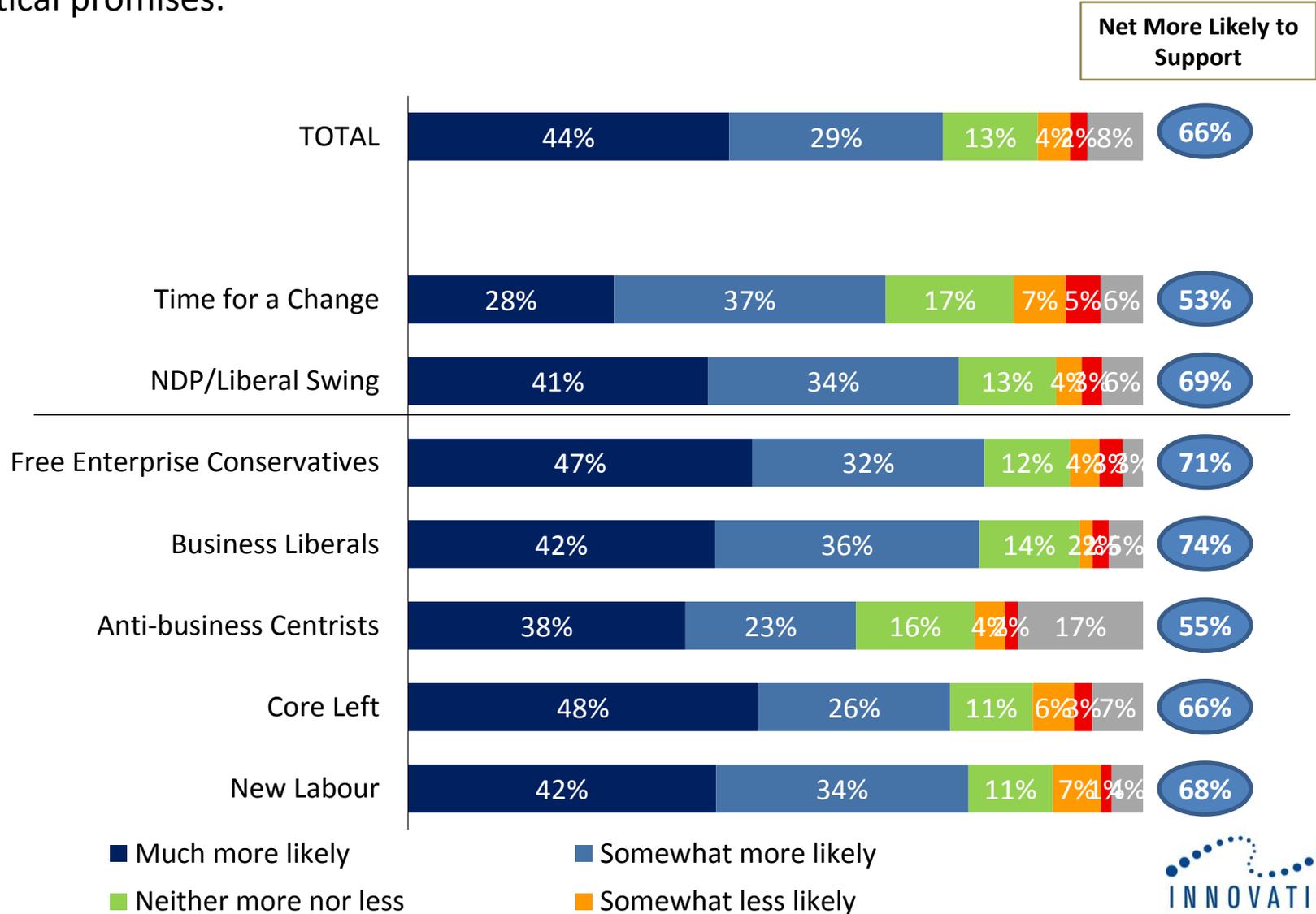
	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely	(red)	(grey)	Net More Likely to Support
TOTAL	27%	27%	20%	9%	11%	7%	**34%**
Time for a Change	22%	33%	21%	12%	5%	7%	**37%**
NDP/Liberal Swing	34%	38%	17%	5%	1%	5%	**65%**
Free Enterprise Conservatives	10%	19%	26%	15%	27%	3%	**-13%**
Business Liberals	26%	34%	20%	8%	7%	6%	**45%**
Anti-business Centrists	25%	25%	22%	6%	4%	17%	**40%**
Core Left	50%	28%	13%	4%	2%	3%	**73%**
New Labour	29%	41%	11%	8%	4%	6%	**58%**

■ Much more likely   ■ Somewhat more likely
■ Neither more nor less   ■ Somewhat less likely

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(Get Provincial Spending Under Control) "Ontario urgently needs to get provincial spending under control to reduce the burden on Ontario taxpayers and the economy. That means reducing the size of government, making public sector wages and benefits more comparable to the private sector, creating more opportunities for private and public organizations to compete to provide provincial services."

	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely	Much less likely	Don't know	Net More Likely to Support
TOTAL	32%	25%	17%	8%	10%	7%	40%
Time for a Change	25%	31%	21%	7%	10%	6%	39%
Liberal/NDP Swing	18%	26%	20%	17%	15%	4%	12%
Free Enterprise Conservatives	52%	29%	10%	4%	2%	2%	75%
Business Liberals	31%	25%	20%	9%	11%	5%	37%
Anti-business Centrists	24%	26%	18%	8%	6%	18%	35%
Core Left	17%	19%	22%	14%	23%	6%	0%
New Labour	30%	25%	25%	5%	8%	7%	41%

■ Much more likely   ■ Somewhat more likely   ■ Neither more nor less
■ Somewhat less likely   ■ Much less likely   ■ Don't know

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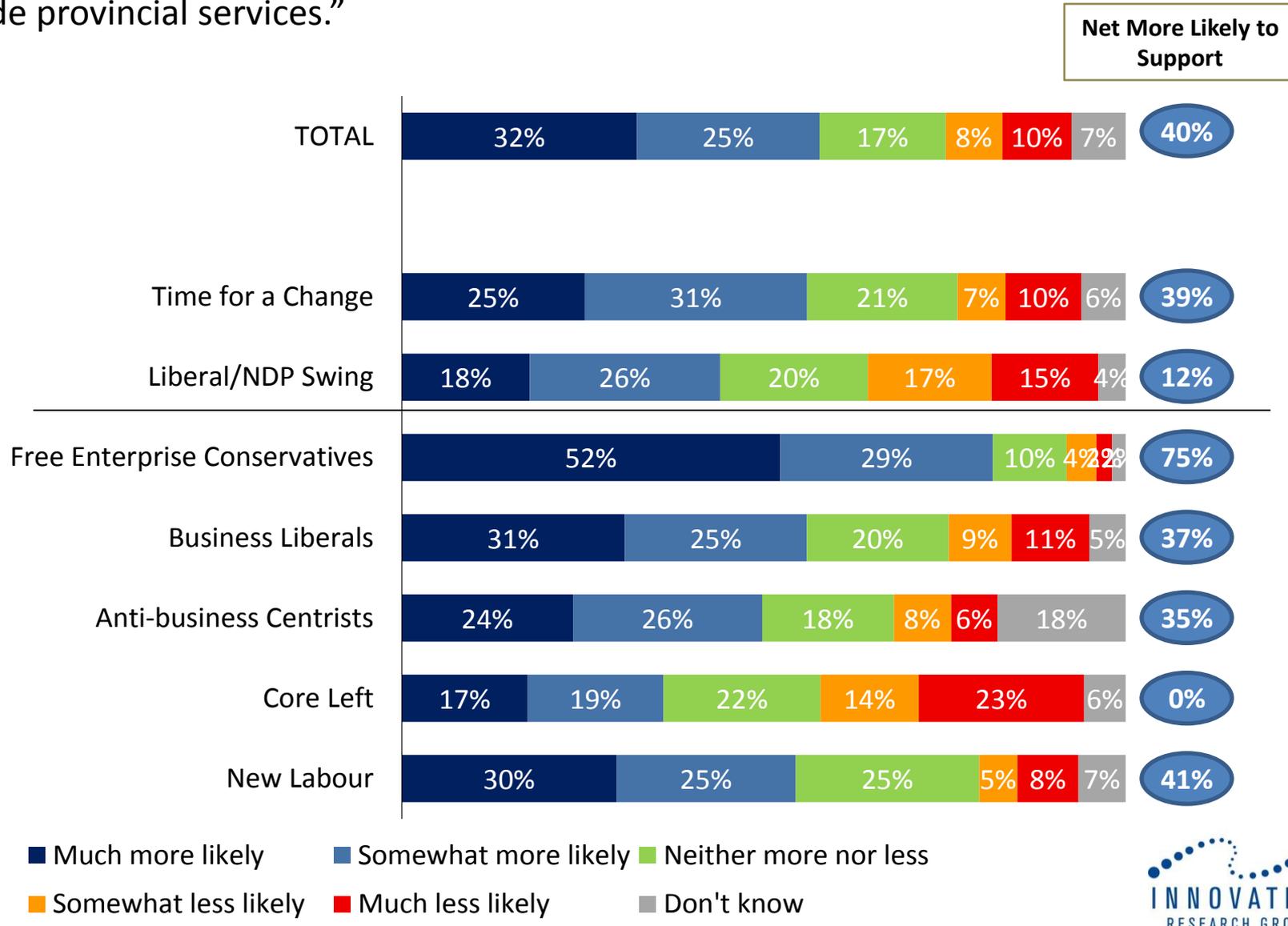
(We Need Leaders Who Will Tell Us the Truth) "We have had enough of politicians to try to say [53] every problem is simple and every answer is easy. We need leaders who will tell us the truth, even when we don't like to hear it. We have complicated problems and often the solutions are difficult, but the only way we can move this province forward is with honesty, not with old-style political promises."

	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely				Net More Likely to Support
TOTAL	44%	29%	13%	4%	2%	8%		66%
Time for a Change	28%	37%	17%	7%	5%	6%		53%
NDP/Liberal Swing	41%	34%	13%	4%	3%	6%		69%
Free Enterprise Conservatives	47%	32%	12%	4%	3%	3%		71%
Business Liberals	42%	36%	14%	2%	2%	5%		74%
Anti-business Centrists	38%	23%	16%	4%	2%	17%		55%
Core Left	48%	26%	11%	6%	3%	7%		66%
New Labour	42%	34%	11%	7%	1%	4%		68%

Legend:
- Much more likely
- Somewhat more likely
- Neither more nor less
- Somewhat less likely

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Campaign Narratives by Value Cluster

(Net "more likely to support a party that adopted these approaches)

	Free Enterprise Conservatives	Business Liberals	Anti-business Centrists	Core Left	New Labour
Get provincial spending under control	**75%**	**37%**	**35%**	**0%**	**41%**
Reduce gap between rich and poor	**-13%**	**45%**	**40%**	**73%**	**58%**
Aging population and infrastructure	**34%**	**67%**	**41%**	**67%**	**58%**
Gov't is tired and run out of ideas	**50%**	**11%**	**16%**	**-6%**	**23%**
Need leaders who will tell us the truth	**71%**	**74%**	**55%**	**66%**	**68%**
Need steady, experienced leadership	**12%**	**49%**	**34%**	**36%**	**45%**

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Campaign Narratives by Vote Battleground Segment

(Net "more likely to support a party that adopted these approaches)

	Core Libs	Liberal/ NDP Swing	Core NDP	Tory/NDP Swing	Core Tories	Liberal/ Tory Swing	Unaligned
Get provincial spending under control	24%	12%	19%	64%	82%	87%	28%
Reduce gap between rich and poor	49%	65%	70%	31%	-18%	16%	30%
Aging population and infrastructure	74%	66%	65%	38%	15%	64%	37%
Gov't is tired and run out of ideas	-34%	-5%	33%	48%	73%	50%	21%
Need leaders who will tell us the truth	70%	69%	62%	56%	79%	60%	54%
Need steady, experienced leadership	63%	58%	16%	23%	-5%	57%	18%

What does the NDP road to victory look like?

The core NDP challenge is the lack of anger

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
The Ontario Liberals have their problems, but they are still the best party to form government	15%	31%	3%	20%	25%	1%
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%	-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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The NDP Road Forward

1. **The NDP should have one primary goal** – to drive up anger, *time for a change*.
   - Many of the natural NDP voters are supporting the Liberals and <u>must</u> be shaken loose.
   - Key parts of the NDP's natural base remain excited about Kathleen Wynne personally. <u>Attacks must drag Wynne into the Liberal mud</u>.
   - This will take time. Wait for the election.

2. **The NDP's best attack comes from the perspective of fairness**. The NDP cannot beat the Liberals with a frontal attack on the economy, they need to focus on issues they do best on – *social justice* and *entitlement to social services*.

3. **Horwath is a great asset, but she is at best simply competitive with Wynne**. The NDP party is dwarfed by the Liberal brand. The NDP need an agenda with issues that are too far left for the Liberals to embrace as tests for *who really cares about fairness*.

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The biggest Tory opportunity lies in polarizing the electorate on the fiscal issues

Penny Pinching Moderates 23%

Small Gov't Conservatives 26%

Business Liberals 12%

Anti-business Centrists 14%

Core Left 18%

New Labour 8%

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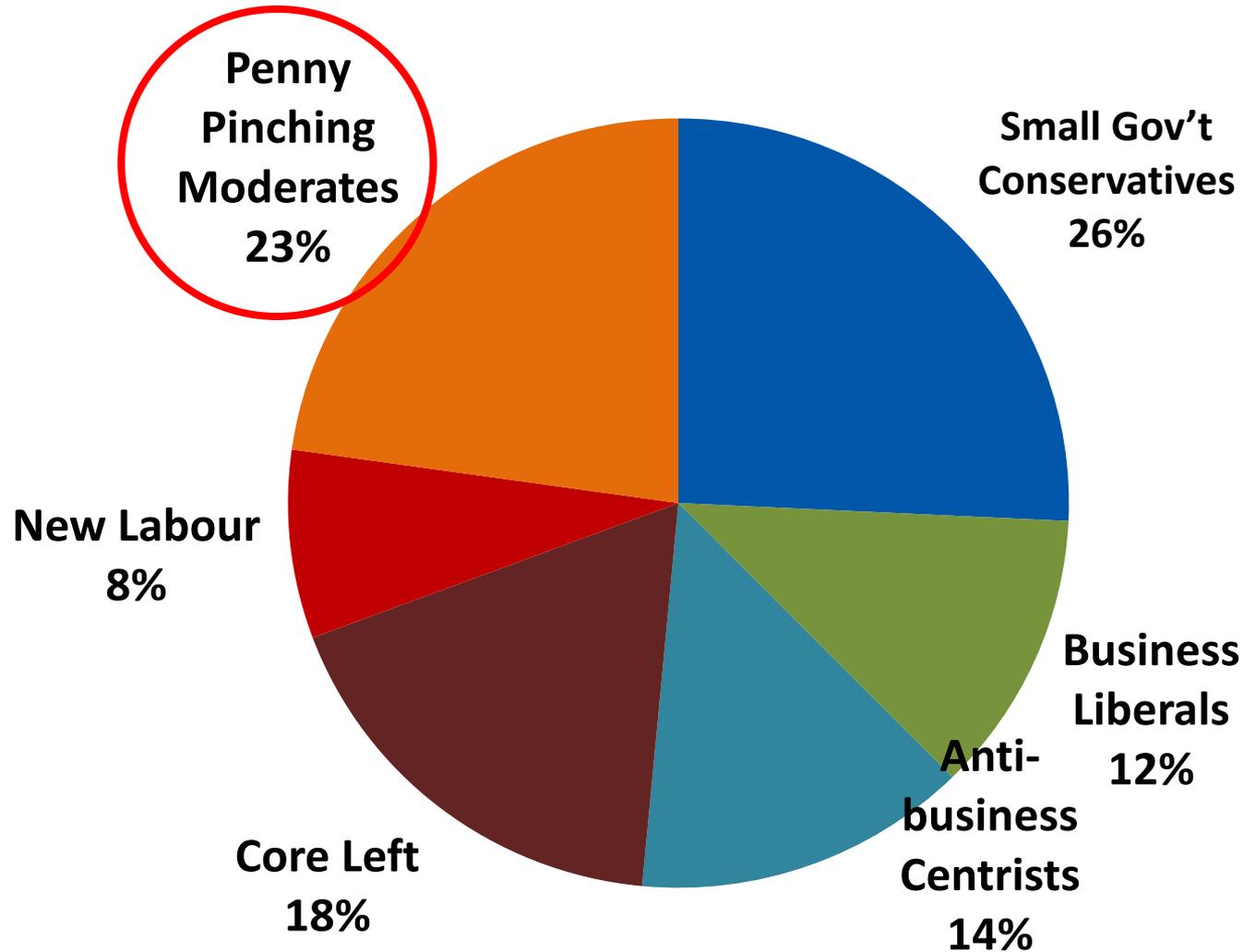
What does the PC road to victory look like?

Attitudinal Table

	Small Gov't Conservatives	Business Liberals	Anti-business Centrists	Core Left	New Labour	Penny Pinching Moderates
Role of government when it comes to economy: **Gov't needs to be an active partner**	0%	91%	41%	71%	37%	70%
It is important for the government to: **Create opportunities so everyone can compete**	88%	96%	86%	0%	0%	55%
Do you think the profit system: **Brings out the worst in human nature**	7%	0%	89%	88%	0%	36%
When gov'ts make decisions on spending on programs, do you think they should base their decisions on: **Their ability to afford the programs**	72%	0%	0%	0%	0%	85%
When it comes to government decision making…: **Too often the gov't listens to experts instead of common sense**	67%	58%	61%	52%	62%	53%
Be open to ideas from all viewpoints (vs focus ideas based on fundamental truths)	57%	81%	70%	75%	62%	65%

(Get Provincial Spending Under Control) "Ontario urgently needs to get provincial spending under control to reduce the burden on Ontario taxpayers and the economy. That means reducing the size of government, making public sector wages and benefits more comparable to the private sector, creating more opportunities for private and public organizations to compete to provide provincial services."
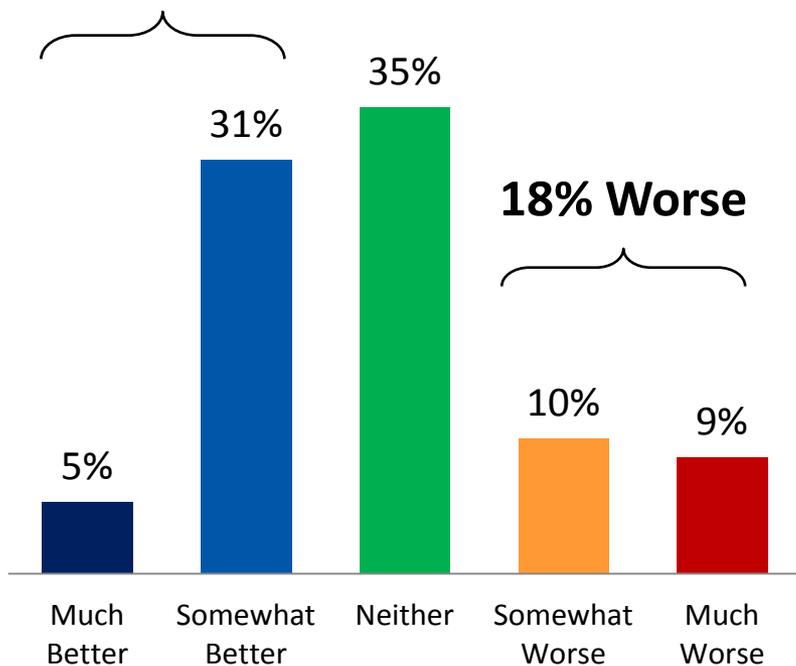
Net More Likely to Support

	Much more likely	Somewhat more likely	Neither more nor less	Somewhat less likely	Much less likely	Don't know	Net More Likely to Support
TOTAL	32%	25%	17%	8%	10%	7%	40%
Time for a Change	25%	31%	21%	7%	10%	6%	39%
Liberal/NDP Swing	18%	26%	20%	17%	15%	4%	12%
Small Gov't Conservatives	55%	26%	13%	2%	1%	3%	78%
Business Liberals	32%	24%	19%	9%	11%	5%	36%
Anti-business Centrists	23%	29%	22%	10%	10%	6%	32%
Core Left	19%	14%	21%	14%	27%	6%	-8%
New Labour	22%	34%	20%	3%	12%	9%	42%
Penning Pinching Moderates	28%	28%	16%	9%	4%	15%	43%

■ Much more likely ■ Somewhat more likely ■ Neither more nor less
■ Somewhat less likely ■ Much less likely ■ Don't know

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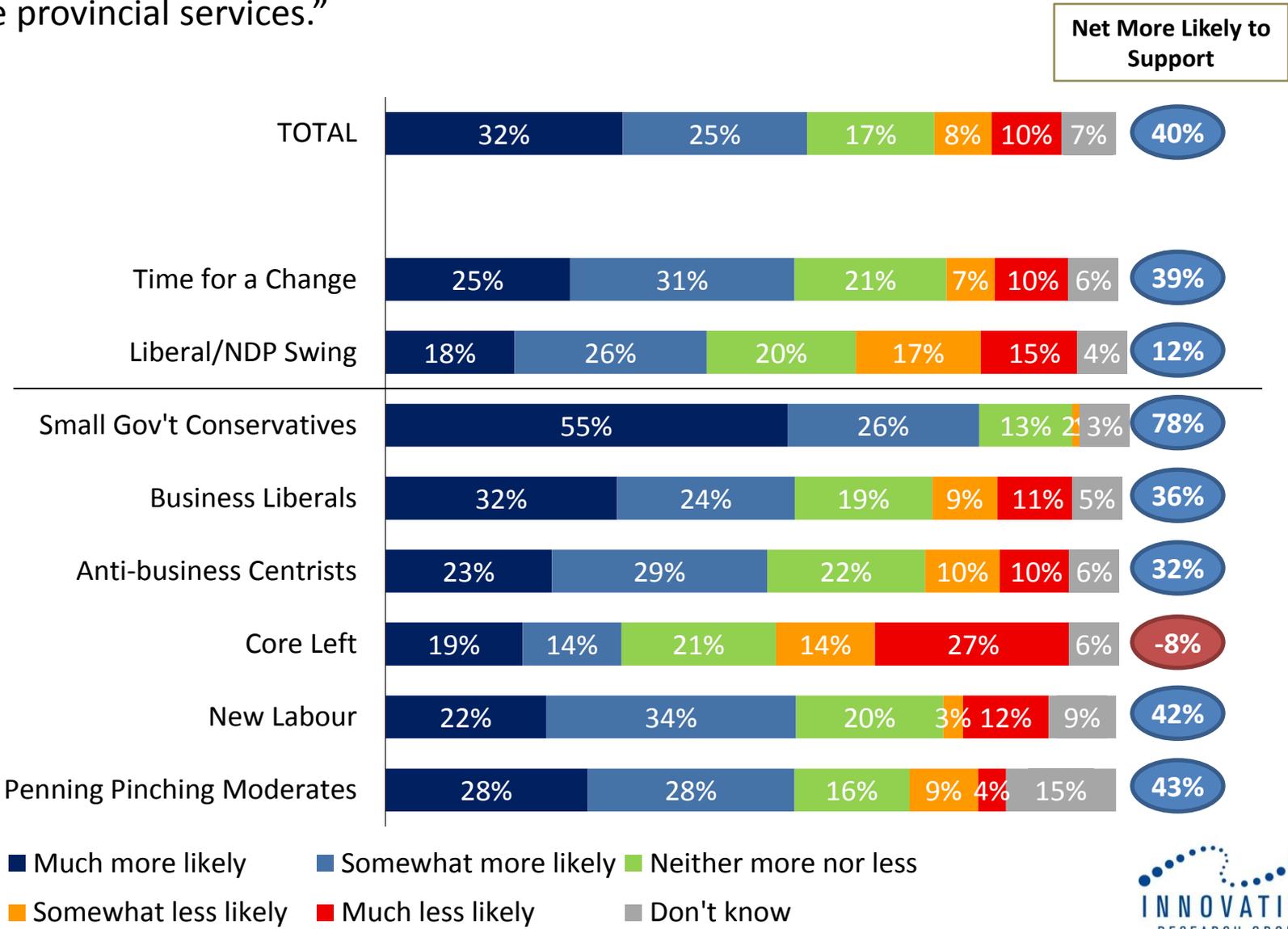
The Tory Road Forward

1. The Tory's are limited by both their brand and their leader.

2. They must find an agenda that can reach into the moderate and progressive side of the spectrum and pull votes in their direction.

3. *Controlling government costs* has strong potential to be that issue. The Liberals are too competitive on the economy for *jobs* to work and nothing else shares the same salience.

4. It also has the potential to provide a "shield" narrative to help deflect "Working Families" ads.

5. The challenge is to prevent that issue from becoming a proof point of "Tory meanness". They need to build a narrative around Tim Hudak's competitiveness on "*shares my values*" and focus on the "*why*" of the policy rather than the "*what*".

6. They also need to drive urgency. Its tough. Can't we wait?

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What does the Liberal road to victory look like?

Wynne has not met expectations but stills holds promise

Q A year ago, **Kathleen Wynne** became Premier of Ontario after winning the leadership of the Liberal Party of Ontario. When she became Premier, did you think she was going to make things better or worse for Ontario?
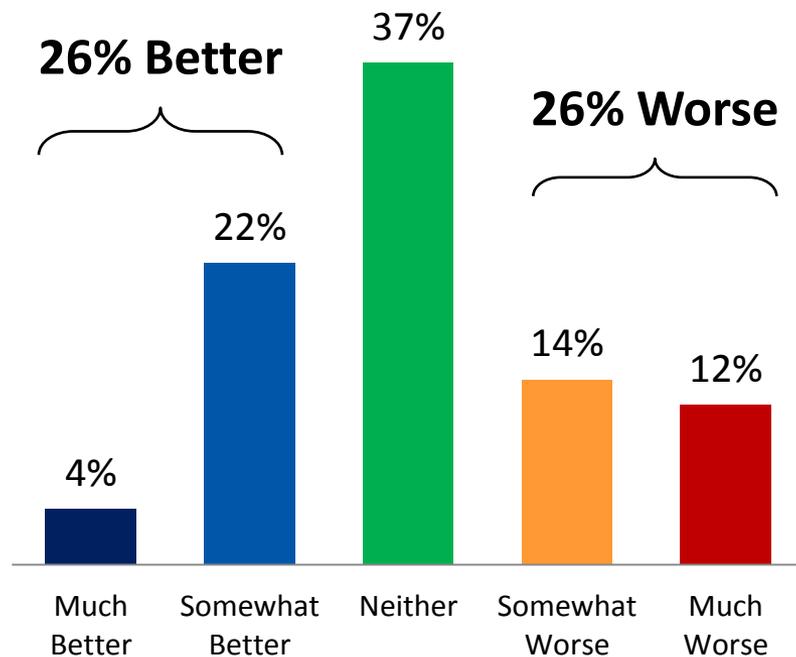
Q Now that **Kathleen Wynne** has been Premier for a year, do you think her leadership has made things better or worse for Ontario??

36% Better

18% Worse

5%	31%	35%	10%	9%
Much Better	Somewhat Better	Neither	Somewhat Worse	Much Worse

26% Better

26% Worse

4%	22%	37%	14%	12%
Much Better	Somewhat Better	Neither	Somewhat Worse	Much Worse

Note: 'Don't know' (11%) not shown

Note: 'Don't know' (11%) not shown

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Wynne Expectations by Value Cluster Segments:
Hard Left had greatest expectations for Wynne

	Conservatives	Business Liberals	Left Liberals	Pocketbook Populous	Deferential Levelers	Hard Left
Much Better	2%	6%	8%	4%	9%	7%
Somewhat Better	23%	36%	29%	25%	28%	44%
Neither	37%	34%	40%	32%	30%	32%
Somewhat Worse	15%	8%	5%	16%	6%	5%
Much Worse	18%	4%	6%	8%	5%	3%
Don't Know	5%	12%	13%	16%	22%	9%

Wynne Performance by Value Cluster Segments: Hard Left still supports Wynne but 14 point drop from expectations

	Conservatives	Business Liberals	Left Liberals	Pocketbook Populous	Deferential Levelers	Hard Left
Much Better	1%	4%	6%	4%	13%	3%
Somewhat Better	19%	22%	24%	15%	18%	34%
Neither	30%	44%	41%	36%	40%	39%
Somewhat Worse	21%	12%	10%	19%	5%	10%
Much Worse	25%	7%	5%	14%	6%	5%
Don't Know	5%	11%	14%	14%	20%	9%

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 with 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.

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Research-based strategic advice.

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