



H+K | PERSPECTIVES

Methodology

H+K Strategies conducted a survey among residents of Ontario in the lead-up to the budget, a budget that has since triggered a provincial election. Our goal was to gain insight into the underlying attitudes and emotions among the electorate. Using our internal panel, H+K Perspectives, we surveyed 1286 residents of Ontario between April 16-27, 2014.

H+K Perspectives is an online panel with approximately 20,000 members nationally. H+K Strategies Canada maintains this panel in order to support our public engagement and campaigns work, along with offering valuable custom research to clients from across our various areas of expertise; whether it be public affairs, public relations, defense, energy or crisis, health and pharma or marketing communications (to name a few).

The methodology we used to recruit the panel was designed by leading panel experts and is maintained by the Public Engagement and Research Group.

For each research assignment we draw a randomly selected sample from the larger panel sample. Using known propensity to respond scores we carefully stratify the sample. During data analysis we apply post-stratification weights to the sample (according to census population parameters).



Analysis

Ontario Election Insight

Our poll, fielded April 16-2, 2014, was one of many fielded in the lead-up to the budget that triggered the Ontario election. Polls conducted by Innovative Research, Nanos Research and Forum painted a confusing picture - Forum had the PCs well ahead, Nanos had the PCs and Liberals in a dead-heat and Innovative had the Liberals well ahead. One thing these firms agreed on, however, was that the NDP was in third place and seemingly losing steam.

But these are analysis of the top-line horse race, which tends to offer more distraction than insight. Instead of falling prey to the mug's game of who's closest on the horse race, we set out to ask probing questions about the emotions people were feeling at the prospect of an election, what characteristics define a premier of the province and a small handful of personality-styled questions.

Our goal was to gain insight into the underlying motivations of party support and the shape of Ontario's political landscape immediately prior to the election call. We will update this picture in the coming weeks during the election.

VISION FOR ONTARIO

What was the prevailing opinion just before the parties in Ontario created the conditions for an election - is Ontario on the right or wrong track? Was there an appetite for charting a new path, or did people prefer a safer, status quo approach?

VISION FOR ONTARIO

- ON TRACK? -

Is Ontario on the right or wrong track? At the opening of the poll we asked respondents to set the stage for us. As the first question this is the cleanest reading of sense of direction for the province, and more people indicated that Ontario was on the wrong track leading up to the election call (52%).

+ Not surprisingly, opposition supporters drive the sentiment that Ontario is on the wrong track (58% of PC supporters and 53% NDP).

+ Youth tend to be more supportive (56% right track) while older respondents were of the opinion the province was on the wrong track (55%).

+ Residents of Eastern Ontario (E.O.) felt the most strongly about the province tracking in the wrong direction, not surprising given the strong PC presence there.

+ It should be noted, however, that among those reporting that the province is on the right track, more than a quarter (28%) are PC supporters and slightly better than one in five (22%) are NDP supporters. This could speak to a desire, among some opposition supporters, for the status quo.

VISION FOR ONTARIO

- STATUS QUO? -

Status quo in Ontario? Maybe. We designed questions around the “safe-hands” message Premier Wynne has used and the “chart a new path” language piloted by Tim Hudak. Overwhelmingly, the safe-hands message is stronger, but much to the chagrin of Liberals, Kathleen Wynne does not own this narrative.

- + Overall, 66% of respondents favour a “safe-hands” approach.
- + Among those who prefer a safe-hands approach, Tim Hudak and Kathleen Wynne are rated neck and neck as the leader best able to deliver on that vision (25% and 23% respectively).
- + Andrea Horwath is the leader seen as best able to “chart a new path” for Ontario (30%).
- + The desire for a stable safe-hands approach is even stronger among undecided voters (71%).

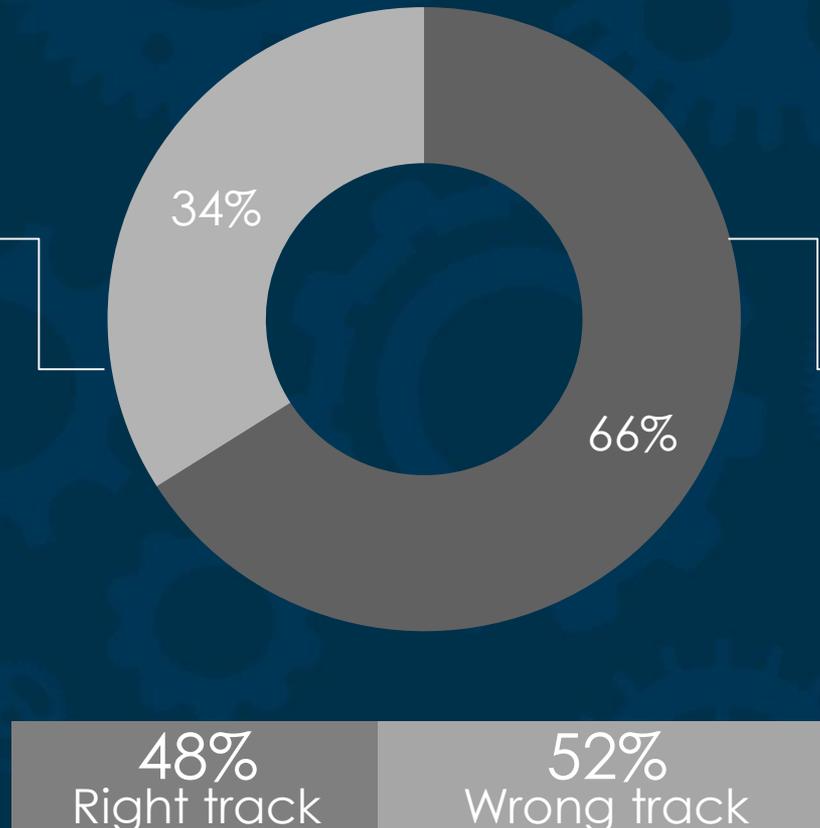
VISION FOR ONTARIO

New Path

Male	37
Female	34
Youth	30
Seniors	25
<40K Income	33
70K+ Income	39
High School	29
College/ University	38
Eastern Ontario	30
Outer GTA	36
Toronto	38
Rest of Ontario	38

Safe-hands

Male	63
Female	67
Youth	70
Seniors	75
<40K Income	67
70K+ Income	61
High School	71
College/ University	62
Eastern Ontario	71
Outer GTA	64
Toronto	62
Rest of Ontario	62



VISION FOR ONTARIO

- TESTIMONIAL -

"I am tired of Politicians wasting our time attacking each other like bullies in a playground. It would be refreshing to see someone who has a plan, believes in the plan, is HONEST and who can talk about their plan and the problems with their opponents' plans in an intelligent professional manner."

AN ONTARIO ELECTION

How did residents in Ontario feel when they thought about the prospects of an election in the lead-up to the budget? In the eventuality of an election, what would their priorities be, and on what side of the coin were they when it came to some of the core platform positions put forward pre-writ?

AN ONTARIO ELECTION

- EMOTIONS -

The dominant emotions across the electorate about the prospects of an Ontario election were: frustrated (26%), optimistic (21%), indifferent (18%) and pessimistic (11%)¹. With these emotions come clear delineations by party.

+ Liberal: Reassuringly to the Liberals many felt optimistic (30%) and some frustrated (20%); powerful emotions. However, nearly one in five (19%) felt indifferent. This degree of indifference in the incumbent group could play out as not yet mobilized soft support or perhaps an early warning sign of migration.

+ PC: Strikingly the dominant emotion among PC supports going into this election was indifference (27%). This level of indifference at the end of a campaign would be crippling. Many PC supporters are frustrated (24%) and optimistic (21%), however, which are strong call-to-action emotions.

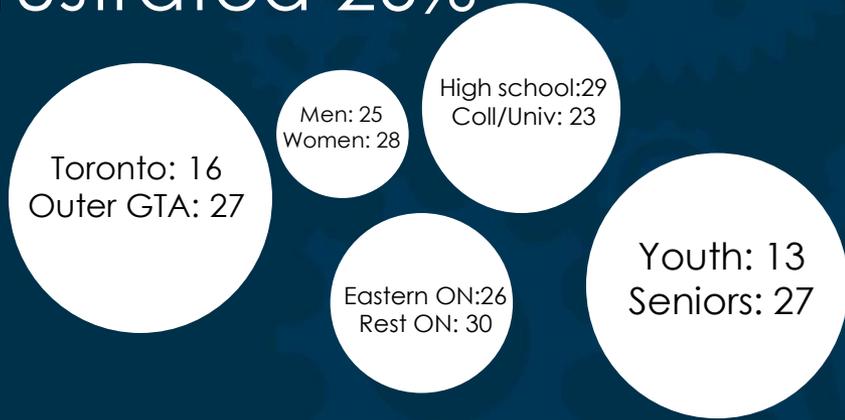
+ NDP: The dominant emotion among NDP supporters was frustration (31%). Some were optimistic (21%) but an almost equal number were pessimistic (16%). Some even felt scared (10%) when they thought about the next ON election. Silver lining? NDP supporters score the lowest on indifference (11%). While the feeling of frustration is potent and has a call to action angle to it, there are underlying defeatist emotions in play for the NDP.

¹: Please note we also tested: scared, energized and excited, all of which scored below 10-points

AN ONTARIO ELECTION

- EMOTIONS -

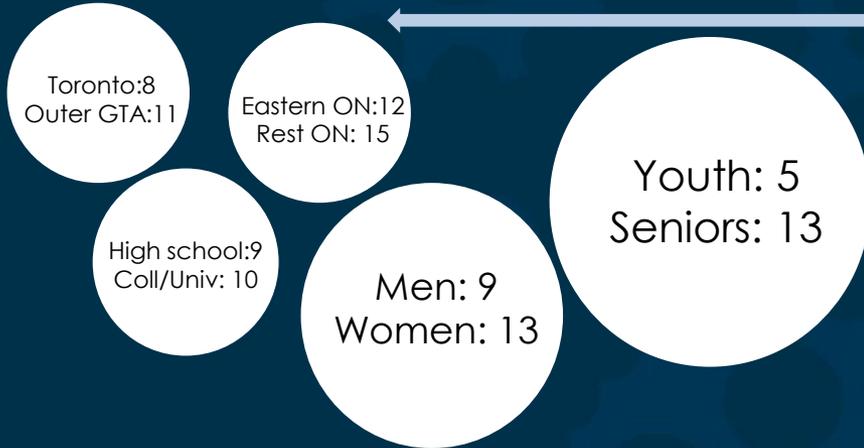
Frustrated 26%



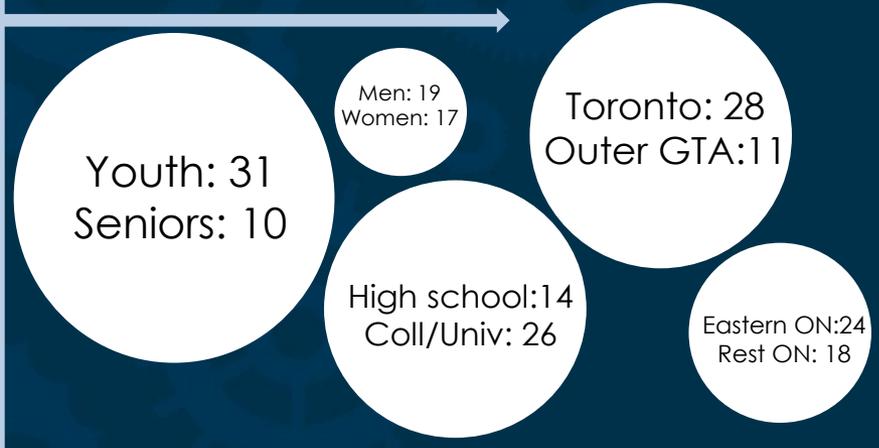
Optimistic 21%



Pessimistic 11%



Indifferent 18%



AN ONTARIO ELECTION

- KEY PRIORITIES -

We asked respondents to select, among a list of 7 key issues, their top-three election issues. We tested: the economy, jobs, education, health care, pension reform, transportation and ethics.

+ 69% of respondents ranked health care among the top three, 63% jobs, 62% the economy, 28% education, 22% pension reform, 22% transportation, 15% ethics.

+ When health care was selected it was either 1st or 2nd place, same with jobs and the economy. When education was selected it was mostly placed 3rd. When pension reform was selected it was mostly ranked 3rd, but often 2nd, and same with transportation. Ethics, while chosen the least by respondents as a top issue, when it was selected was placed 1st a third of the time.

+ Health is the domain of Liberals and NDP supporters, Liberal supporters place it first 42% of the time and NDP supporters 40% of the time. Meanwhile less than a third of PC supporters (31%) place it tops when chosen.

+ When it comes to jobs, however, we see NDP supporters aligning more with PC supporters. When the issue of jobs was selected, 44% of NDP supporters placed it 1st, while 36% of PC supporters did the same.

+ The economy remains a comfortable spot for PC supporters; they are far more likely to place the economy in 1st place than supporters of the other two parties (58% compared to 46% of Liberal supporters and 35% of NDP supporters).

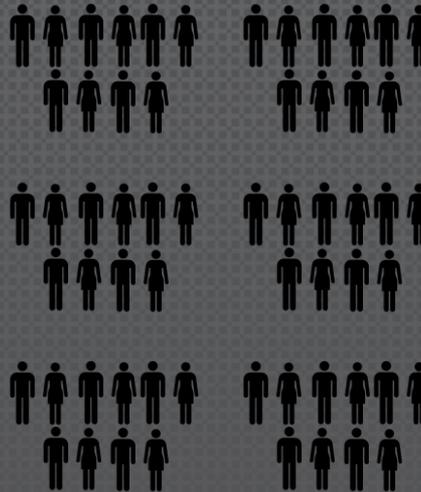
AN ONTARIO ELECTION

- KEY PRIORITIES -

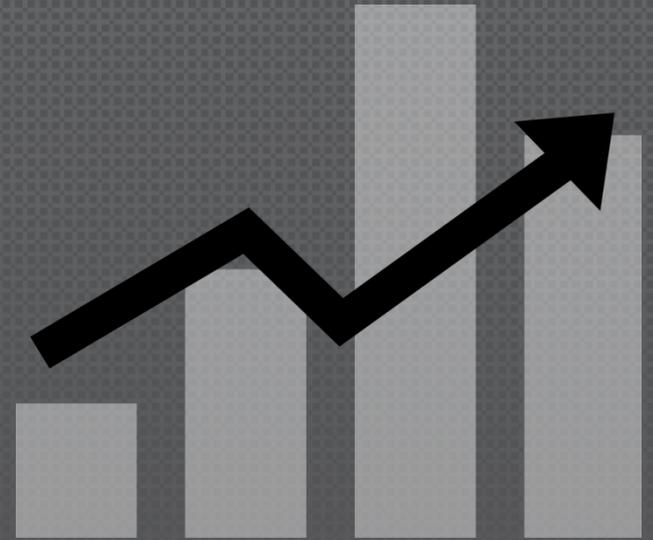
Health Care



Jobs



Economy



Liberal / NDP

How often is Health Care ranked 1st by party supporters?

+Liberal: 42% of the time
+NDP: 40% of the time
+PC: 31% of the time

NDP / PC

How often is Jobs ranked 1st by party supporters?

+NDP: 44% of the time
+PC: 36% of the time
+Liberal: 30% of the time

PC

How often is the Economy ranked 1st by party supporters?

+PC: 58% of the time
+Liberal: 46% of the time
+NDP: 36% of the time

AN ONTARIO ELECTION

- TRADE-OFF -

We have found that a reliable way to uncover opinions and attitudes is by asking a so-called trade-off question. The construct strips away ambiguity and encourages a respondent to pick a side and move away from the fence. Our team designed five questions relevant to the pre-budget Ontario dialogue (and now, election landscape).

Notions of stability rule the day: Balance the books, no hand-outs and no new taxes (for roads and retirement alike).

42% say "Ontarians require more tools from government to help save for their retirement even if it means paying higher taxes."

+ 48% Liberals, 30% PC, 49% NDP

58% say "We shouldn't increase taxes even if it means Ontarians do not have additional help to save for their retirement."

+ 52% Liberals, 70% PC, 51% NDP

33% say "New transit and highways in the GTA and the rest of the province should be funded by new personal and corporate taxes and user fees."

+ 42% Liberals, 27% PC, 38% NDP

67% say "Transit and highways should be funded by using money from other existing budgets."

+ 58% Liberals, 73% PC, 62% NDP

55% say "We should balance the budget as soon as possible, even if it means fewer services."

+ 43% Liberals, 65% PC, 48% NDP

45% say "It is okay to run deficits over the short term, even if it means a weaker economy."

+ 58% Liberals, 35% PC, 52% NDP

36% say "In today's competitive global economy it's essential to spend tax dollars to attract companies to Ontario in order to create jobs."

+ 39% Liberals, 40% PC, 34% NDP

64% say "Ontario should not give handouts since companies make enough money as is and already enjoy a competitive tax rate."

+ 61% Liberals, 61% PC, 66% NDP

44% say "It doesn't matter which party wins the next Ontario election because the parties today are pretty much all the same when it comes to the economy."

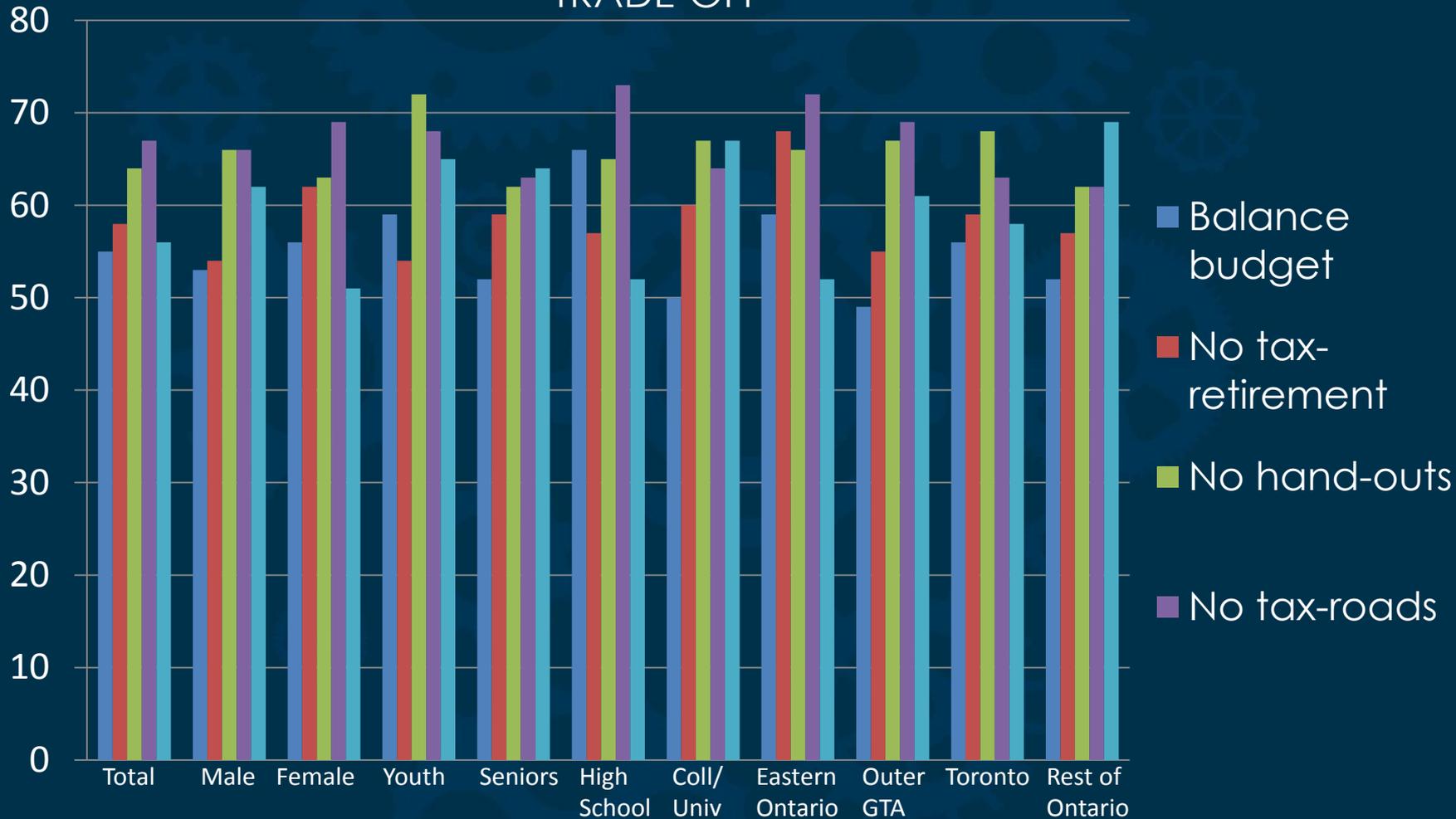
+ 41% Liberals, 32% PC, 33% NDP

56% say "The party leaders are very different and therefore the outcome of the election is very important when it comes to the management of the economy."

+ 59% Liberals, 67% PC, 61% NDP

AN ONTARIO ELECTION

- TRADE-OFF -



AN ONTARIO ELECTION

- TESTIMONIAL -

“... political parties need to start listening...”

PARTY SUPPORT

Which party has held on to the most supporters from the 2011 election? What is the most important characteristic for a premier to possess? How familiar are people with the leaders?

PARTY SUPPORT

- STRENGTH -

The PC party enjoys the largest retention of party support from the 2011 vote, while the incumbent Liberals are on the softest ground. Much of the uncertainty of the Liberal strength comes from previous voters migrating to the NDP (in two times the numbers that the Liberals are nabbing previous NDP supporters). These migratory patterns however are fluid, and once an election is called initial lines are drawn that didn't exist in a pre-election state. Regardless, we thought it illuminating to see the patterns that existed at last-light for the previous Ontario legislature.

+ Voted Liberal in 2011 – Vote intention today: 59% Liberal, 15% PC, 24% NDP

+ Voted PC in 2011 – Vote intention today: 11% Liberal, 76% PC, 9% NDP

+ Voted NDP in 2011 – Vote intention today: 12% Liberal, 9% PC, 71% NDP

A majority of those surveyed said they will 'definitely' vote in the next Ontario election (52%). While we know this to be likely overstated, looking at level of commitment against party support is often illustrative of the strength of party support.

+ Will definitely vote: 28% Liberal, 36% PC, 29% NDP

+ Will likely vote: 41% Liberal, 14% PC, 37% NDP

+ Will probably/probably not vote: 19% Liberal, 21% PC, 42% NDP

PARTY SUPPORT

- CHARACTERISTIC OF A PREMIER -

Overwhelmingly Ontarians agree that the leader who gets the keys to the premier's office has to be trustworthy. We asked respondents to tell us what the most important characteristic is for a premier of Ontario – hands down *trustworthy* was chosen (62%), more than the characteristics of *decisive* (12%), *compassionate* (6%), *steady* (5%), *bold* (4%) and *approachable* (4%) combined. We also asked which leader is best able to embody these characteristics.

+ Liberal: While half agree that being trustworthy is the most important characteristic for a premier (50%), Liberal supporters also feel strongly (relative to other part supporters) about a leader who is also decisive (16%). Kathleen Wynne is seen as best able to be decisive (35%).

+ PC: Almost 7 in 10 (69%) of PC supporters feel that the premier ought to be trustworthy. This is a position of strength for the PCs as their leader, Tim Hudak, is seen as the leader best able to be trustworthy (28%).

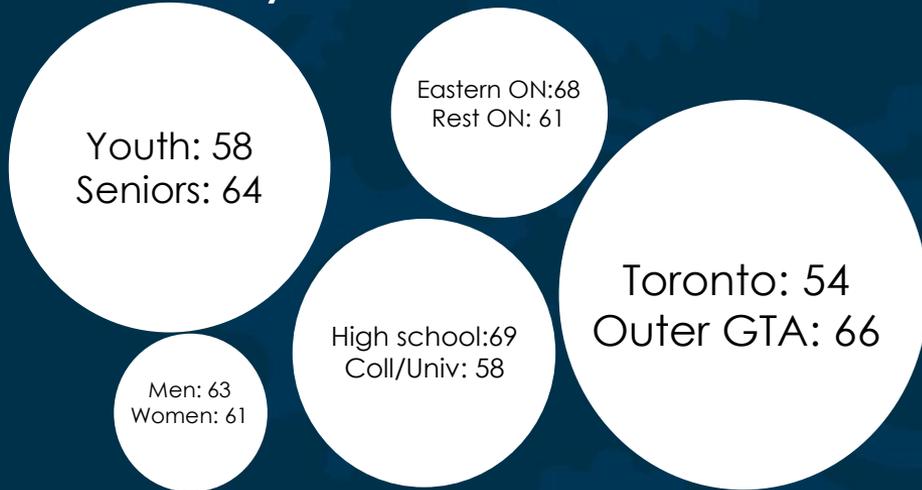
+ NDP: Like the PCs, and unlike the Liberals, more than 6 in 10 NDP supporters feel that the premier should be trustworthy (63%). Virtually tied for second most important as the characteristics of *compassionate* (13%) and *decisive* (12%). While Tim Hudak is the leader best seen to be trustworthy, and Kathleen Wynne decisive, Andrea Horwath is seen as the most compassionate (54%).

PARTY SUPPORT

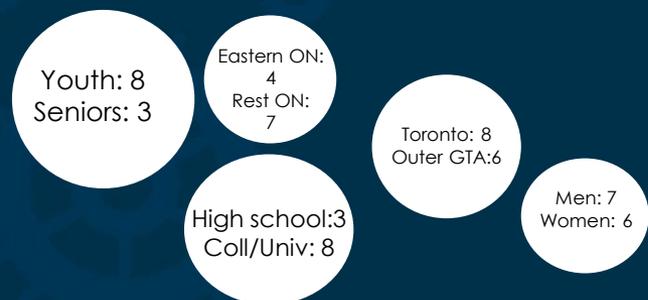
- CHARACTERISTIC OF A PREMIER (Top 4) -

Trustworthy 62%

Decisive 12%



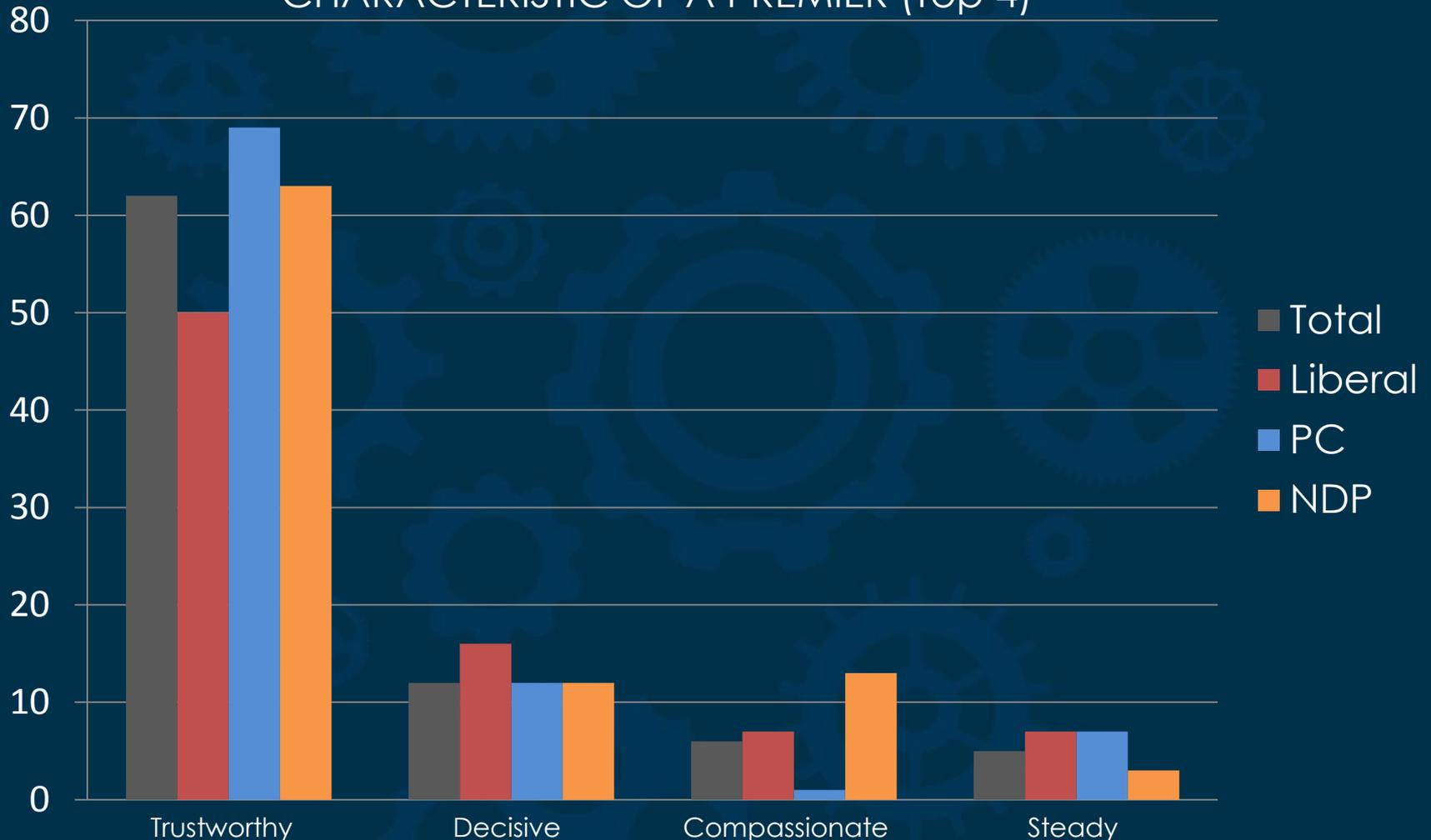
Steady 5%



Compassionate 6%

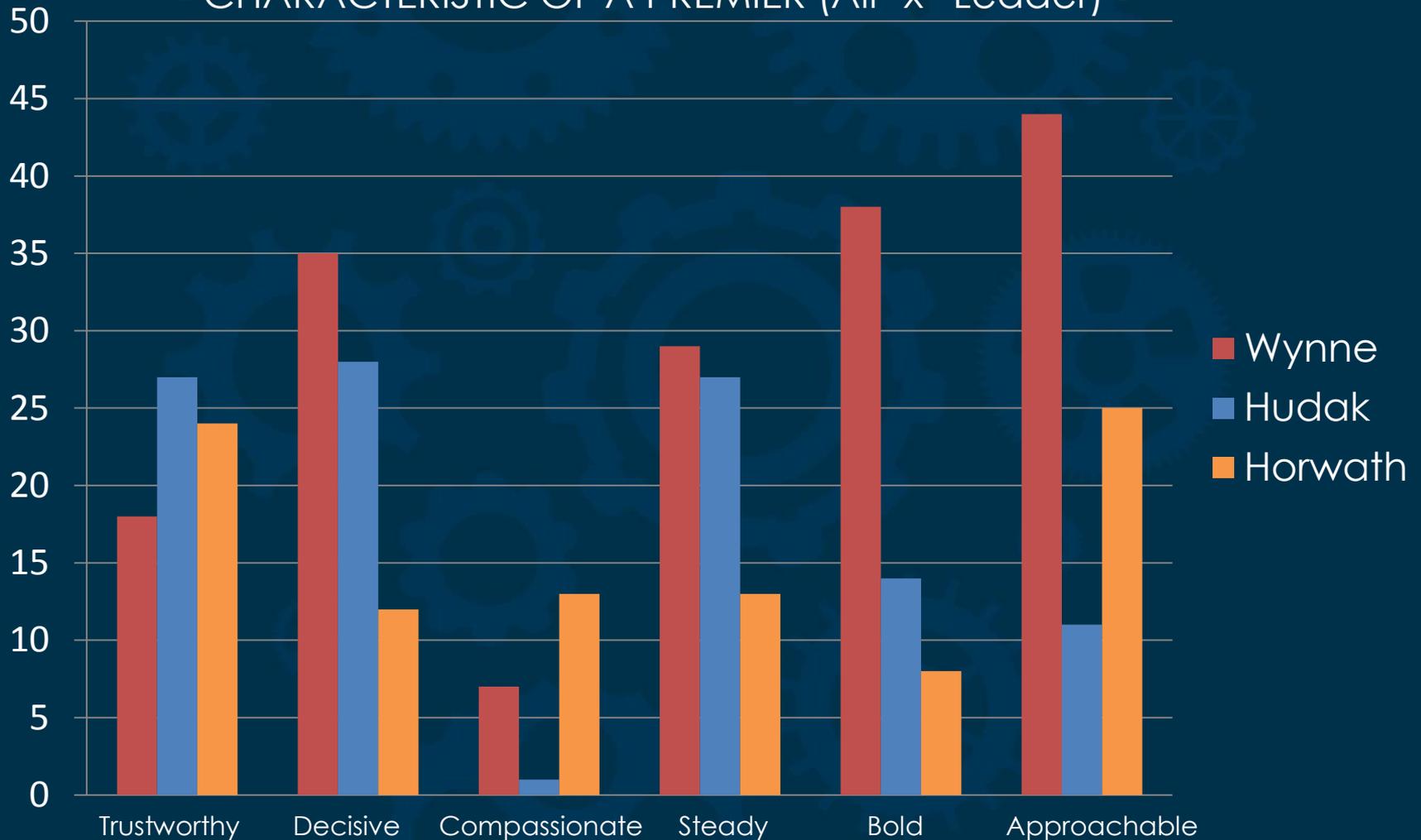
PARTY SUPPORT

- CHARACTERISTIC OF A PREMIER (Top 4) -



PARTY SUPPORT

- CHARACTERISTIC OF A PREMIER (All 'x' Leader) -



PARTY SUPPORT

- FAMILIARITY WITH LEADERS -

While Andrea Horwath and Tim Hudak led their parties in the last election, and Kathleen Wynne has the benefits from a larger share of media coverage outside an election as premier, we still felt it necessary to gain a baseline understanding of how familiar residents of Ontario are with the leaders of the parties.

Kathleen Wynne has the highest familiarity score (42%), but only marginally more than Tim Hudak (40%). Both leaders have blind spots in the electorate however, where almost 1 in 3 report being unfamiliar with these leaders. Andrea Horwath, despite being the longest serving leader among the three, has the lowest familiarity score (34%) and in fact more people are unfamiliar with her (42%) than familiar.

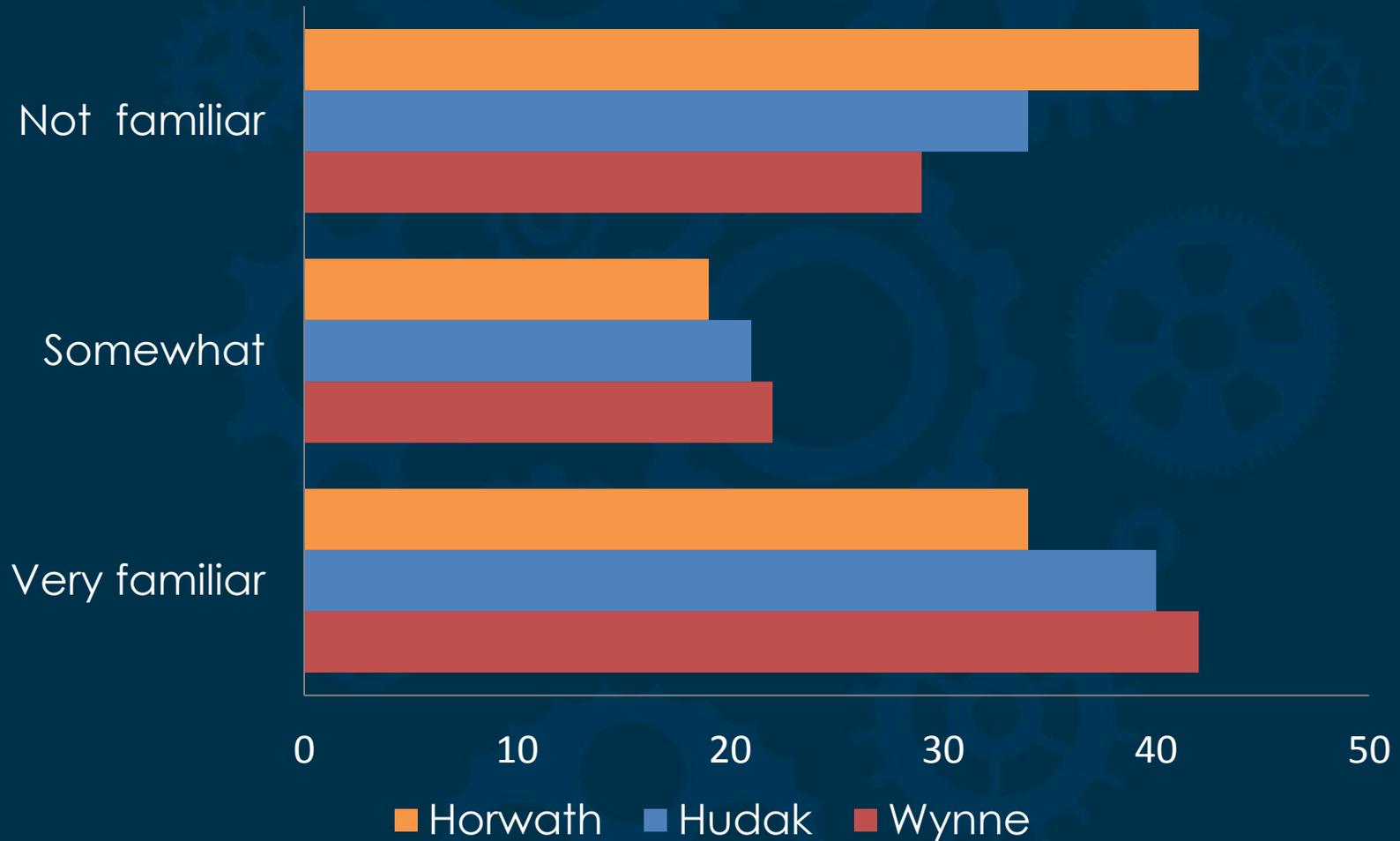
+ Kathleen Wynne: not familiar 29%, somewhat familiar 22%, very familiar 42%.

+ Tim Hudak: not familiar 34%, somewhat familiar 21%, very familiar 40%.

+ Andrea Horwath: not familiar 42%, somewhat familiar 19%, very familiar 34%.

PARTY SUPPORT

- FAMILIARITY WITH LEADERS -



PARTY SUPPORT

- TESTIMONIAL -

"I have a real trust issue with all the major parties."

SUPPORTERS

Which party has more wallflowers, or a larger group of pragmatic thinkers? Which party is home to the warm-hearted or cool-headed? What about those who thrive on the tangible vs. the intangible? And, as importantly, where are the fans of *Game of Thrones*?

SUPPORTERS

- LOOK AT THE INKBLOT – WHAT DO YOU SEE? -

As part of our survey instrument we designed and fielded five personality-styled questions. Peeling back the layers and seeking out the underlying make-up of party support was the primary objective of this research. Adding this behavioural and psychometric dimension to our analysis allowed us to go beyond basic demographics and build a typology of supporters for each party.

- + At a party people are almost as likely to interact with many people, including strangers (51%) as interact with fewer people, mostly known to them (49%).
- + At work, people tend to feel they have more success with tasks with a firm deadline (59%) as compared to open-ended tasks (41%).
- + There is an almost equal split of people saying that they feel happier thinking about buying something (52%) compared to those who feel happy having just bought something (48%).
- + Most characterize themselves as warm-hearted (74%), while just over a quarter think of themselves as cool-headed (26%).
- + Game of Thrones? 21% of respondents indicated they are caught-up on the series (or catching up), while 43% said “I don’t even know what Game of Thrones is”.

What happens when we you put this analysis together with supporters of the three main parties? Using these questions we built a typology by party supporter, and positioned the analysis as though you just walked into a room of supporters of party X – what does it look like?

SUPPORTERS



You walk into a room of Liberal supporters, what does it look like?
This is an eclectic group that seems to be the home of many. As you move about the room, you're as likely to find outgoing people as wallflowers and you observe there is an elegant balance between task oriented people and those who thrive on improvisation. Most here say that they enjoy dreaming about something rather than actually having it. But at the very moment they tell you this, they are likely standing beside a more pragmatic person. This is a warm hearted group. And, while most people here would give you a blank look if you brought up *Game of Thrones*, there are small pronounced clusters discussing the latest goings on in Westeros.



You walk into a room of PC supporters, what does it look like?
This is a tight group of outgoing, optimistic people. A bit cliquish though. As you would expect, most in the room are task oriented (these are all decided PC supporters after all), but some do thrive on improvisation. There is a balanced dichotomy in this room where half the people are happier to contemplate something as actually have it, while the opposite is true for the other half (yin and yang?). More in this room (compared to other parties) characterize themselves as cool-headed (over warm hearted), but there is texture to this stoic resolve - in this room there is a playfully high proportion (almost 1 in 5) who are either fully caught up on the *Game of Thrones* series, or binge-watching their way to it!



You walk into a room of NDP supporters, what does it look like?
The overlapping social circles and opportunity to exchange insights is very pronounced here. More than 6 in 10 in this room prefer to cast their social net wider (the highest proportion of any party). Yet, don't kid yourself into thinking this is all fluffy good times. The people here are frustrated and excel at close-ended tasks. Few here improvise. Blended into this task-oriented typology, however, is a tendency to be happier with the intangible. Are we seeing a group of focused, frustrated strategist and tacticians, are a group of upset day dreamers? Hard to tell. One thing we do know is that more people in this room (compared o other parties) are prone to classify themselves as warm-hearted (over cool headed). *Game of Thrones*? Pardon, what's Westeros? Close to 7 in 10 are not fans.



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