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ONTARIO LIBERALS ENJOY A MODEST, BUT STABLE LEAD IN TIGHT TWO-WAY RACE

[Ottawa – May 16, 2014] – The Ontario provincial campaign is shaping up to be one of the most interesting campaigns in recent political history. It features two sharply contradictory policy visions: an austerity/minimal government model versus a progressive, active state intervention model. Superimposed on that stark choice is the regime fatigue and ethical issues which are confounding the voters' decision making in ways which make the outcome of this race highly uncertain. These dynamics are also placing challenges on pollsters trying to accurately gauge exactly where voters are and where they may go. More on this later.

First the highlights: our polling shows the Liberals with a clear and possibly growing lead. They have opened up a seven-point lead on Tim Hudak's Progressive Conservatives (PC) and the (for now) hapless NDP have blown up under a decision to pull the plug on a budget that normally would have been seen as quite attractive to the NDP and their supporters. Andrea Horwath's party has cratered from a near tie before the writ was dropped¹ to a clear laggard as flummoxed NDP voters have exited to other parties and the undecided camp (which is unusually large this time). The high indecision reflects the challenge for voters trying to weigh their "throw out the bums" instincts with serious wariness of another neo common sense revolution led by the somewhat underwhelming Tim Hudak. All of this sets the stage for an extremely tight contest between the Liberals and the PCs.

So how about those conflicting polls? First of all, we don't comment on our competitors who we believe are all very competent professionals trying their best to get this right. We will, however, say that we are very confident that the modest but significant Liberal lead is reflective of reality. We say this for a number of reasons. First, we believe strongly in the advantages of covering all portions of the population (land line and cell phone only households, online and offline). We also continue to believe in the importance of sampling with known probabilities from a frame which includes all of the eligible voters. We also note that some of the indicators that we track where we know the "real" number (and no one knows the "real" vote intention numbers now) show comforting correspondence with external reality. For example, our sample reveals 2011 voting behaviour which looks like the 2011 election.

HIGHLIGHTS

- **Ontario provincial vote intention:**
 - ▣ **37.1% Liberal**
 - ▣ **30.3% Progressive Conservative**
 - ▣ **20.9% NDP**
 - ▣ **7.3% Green Party**
 - ▣ **4.5% Other**

Please note that the methodology is provided at the end of this document.



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¹ EKOS Research Associates, "Ontario Anyone's Game", April 9, 2014. Available online at: <http://goo.gl/HiwTav>

Our current polling is a pretty basic tracking method which does a good job of measuring vote intention of all eligible voters. However, it doesn't shed nearly enough light on the question of who will actually turn out to vote. Voter turnout and get-out-the-vote will be critical to understanding the outcome of this election. Our next iterations will begin to incorporate some of the diagnostic tools to allow us to forecast the outcome (as we did very successfully in the last Ontario election).

Before concluding with some analysis of the demographic patterns and linkages to the federal scene, we note that our polling has shown clear and stable patterns. And within those patterns, we have never seen the Liberals behind. Within our margin of error, the Liberal lead could be as narrow as a couple of points but we do not find anything resembling a PC lead.

Hudak failing to connect with foreign-born Canadians

One of the failures of Mr. Hudak's 2011 campaign was his inability to connect with foreign-born voters. More than two years later, he seems to have made little headway. Indeed, the Ontario Liberals hold a decisive 18-point lead among those who were born outside Canada.

In a rather significant finding, the Liberals have opened up a sizeable lead among those ages 45-64. A point we have reiterated time and time again (and will not hesitate to do so again here) is that younger age groups (i.e., those under 45) have a much lower propensity to show up and vote on Election Day. For this reason, the two key groups to watch in this election will be Baby Boomers (which, in this case, we define as those ages 45-64) and seniors (i.e., those ages 65 and up). While the Liberals continue to trail the PCs among the latter group, it is highly notable that now hold an advantage among the former. Whether this represents a sustained pattern of baby boomers shifting to the Liberals or is merely a one-time blip remains to be seen. It will be worth keeping an eye on this over the coming weeks.

Regionally, The Liberals lead quite handily in the core Greater Toronto Area (GTA), as well as Northeast and Central Ontario. The Liberals and PCs are neck-and-neck in both the suburban regions of the GTA and Ottawa/Eastern Ontario. Southwest Ontario is a tight three-way race, with no party standing out as a clear winner or loser.

The Liberals continue to hold a daunting lead among the university educated (which has not widened despite Mr. Hudak's plan to cut funding to education) and have closed the gap on the PCs in terms of the college vote. The PCs hold a small, statistically insignificant lead among men, but they are not competitive among women.

Rise of the Others?

On a final note, we would like to comment on the unusually high proportion of respondents who have indicated that they intend to vote for “another” party (i.e., not Liberal, PC, NDP, or Green), which now stands at five per cent (more than three times the 2011 election result). We do not believe this figure represents real support and these results will not translate into more votes – let alone seats – for fringe parties and independent candidates. Rather, we believe these findings are reflective of a deeply frustrated public who are not particularly enthused with any of the party options and are simply opting for “none of the above”.

Top Line Results:

Ontario vote intention

Q. If a provincial election were held tomorrow, which party would you vote for?

Provincial results



2011 Ontario Election Results



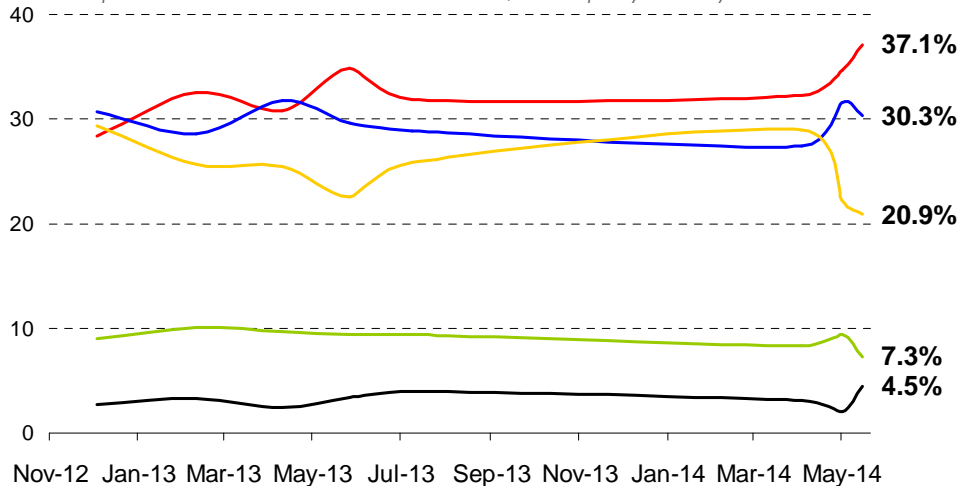
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 18.8% of respondents are undecided.

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BASE: Residents of Ontario; May 13-15, 2014 (n=1,111)

Tracking Ontario vote intention

Q. If a provincial election were held tomorrow, which party would you vote for?



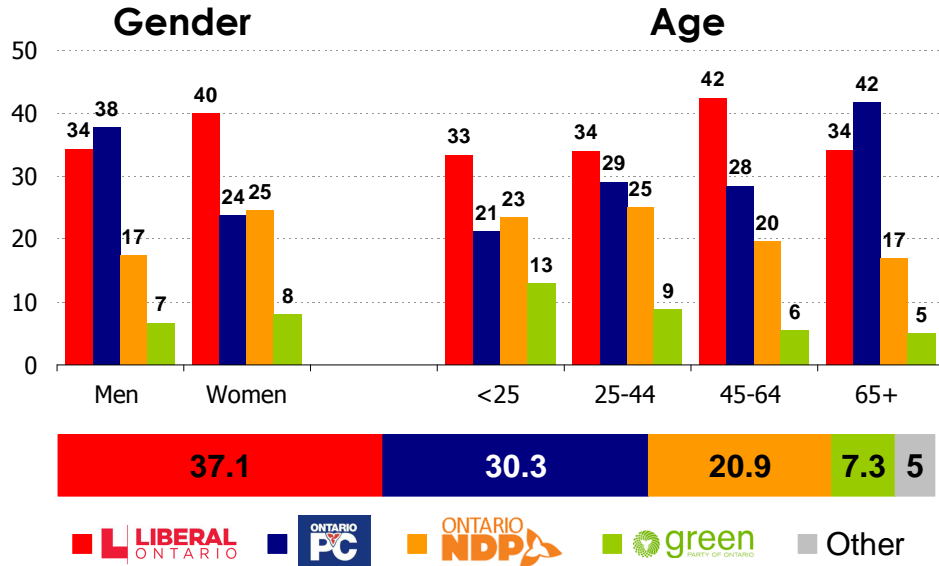
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 18.8% of respondents are undecided.

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BASE: Residents of Ontario; most recent data point May 13-15, 2014 (n=1,111)

Ontario vote intention by gender/age

Q. If a provincial election were held tomorrow, which party would you vote for?

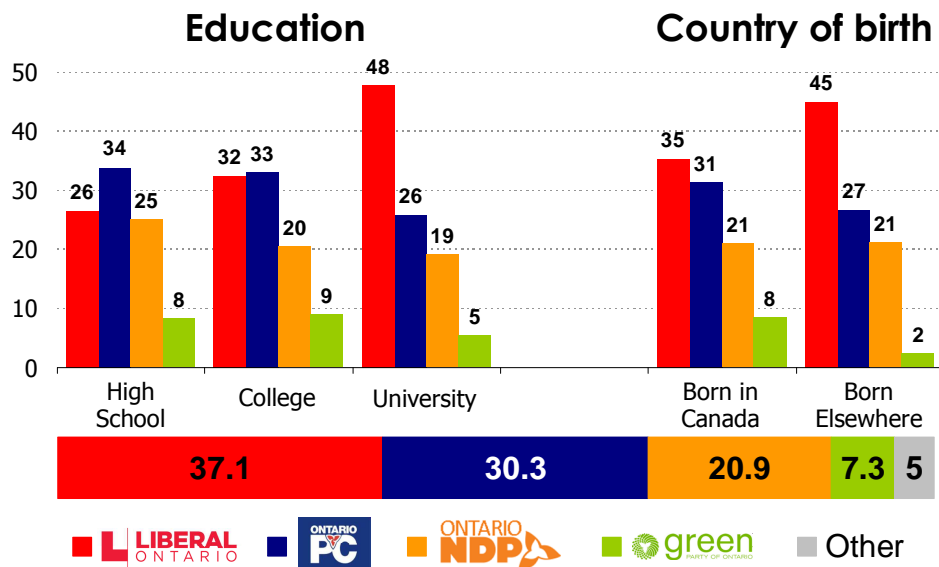


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BASE: Residents of Ontario; May 13-15, 2014 (n=1,111)

Ontario vote intention by other demographics

Q. If a provincial election were held tomorrow, which party would you vote for?

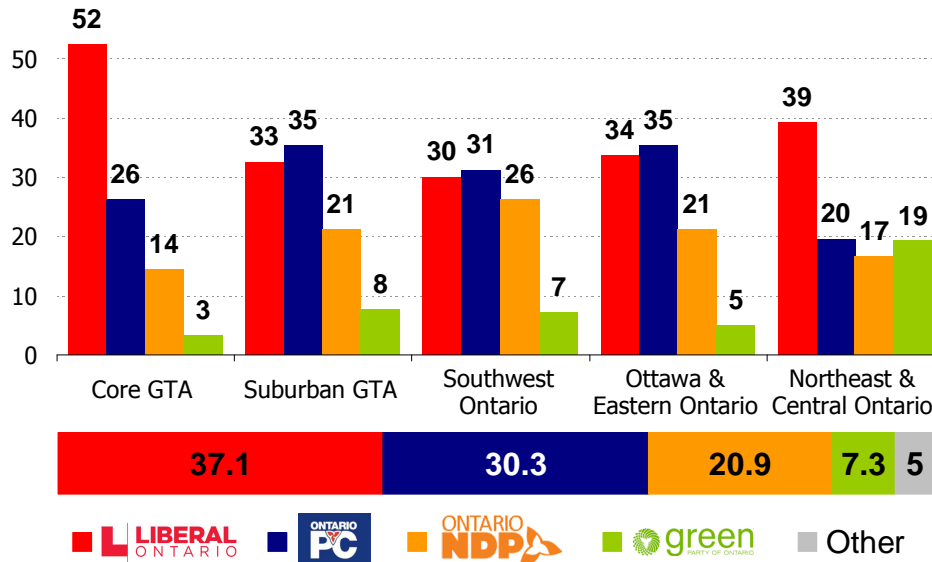


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Ontario vote intention by region

Q. If a provincial election were held tomorrow, which party would you vote for?



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Composition of Ontario party support

Q. If a federal election were held tomorrow, which party would you vote for?

Ontario Liberal Party



Progressive Conservative Party of Ontario



Ontario NDP







Green Party of Ontario



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BASE: Residents of Ontario; May 13-15, 2014 (n=1,111)

Detailed Tables:

Provincial Vote Intention: Ontario							
<i>Q. If a provincial election were held tomorrow, which party would you vote for? [If undecided] Even if you do not have a firm idea, are you leaning towards a party? [If yes] As it stands, towards which party are you leaning?</i>							
					Other	Sample Size	Margin of Error (+/-)
OVERALL	37.1%	30.3%	20.9%	7.3%	4.5%	910	3.3
REGION							
Toronto/Core GTA	52.3%	26.2%	14.3%	3.1%	4.1%	204	6.9
Suburban GTA	32.5%	35.4%	21.2%	7.6%	3.3%	234	6.4
Southwest Ontario	30.0%	31.1%	26.1%	7.2%	5.6%	212	6.7
Ottawa and Eastern Ontario	33.6%	35.3%	21.2%	4.8%	5.0%	134	8.5
Northeast and Central Ontario	39.1%	19.5%	16.5%	19.2%	5.7%	101	9.8
Northwest Ontario	36.5%	19.6%	43.9%	0.0%	0.0%	25	19.6
GENDER							
Male	34.1%	37.6%	17.2%	6.6%	4.5%	458	4.6
Female	39.8%	23.6%	24.5%	8.0%	4.1%	443	4.7
AGE							
<25	33.2%	21.2%	23.3%	12.9%	9.4%	28	18.5
25-44	33.8%	29.0%	24.9%	8.7%	3.7%	140	8.3
45-64	42.3%	28.4%	19.6%	5.5%	4.1%	368	5.1
65+	34.0%	41.6%	16.8%	4.9%	2.7%	367	5.1
EDUCATION							
High school or less	26.4%	33.7%	24.9%	8.2%	6.8%	216	6.7
College or CEGEP	32.3%	33.0%	20.4%	8.9%	5.3%	264	6.0
University or higher	47.7%	25.8%	19.1%	5.3%	2.1%	422	4.8
COUNTRY OF BIRTH							
Canada	35.3%	31.2%	20.9%	8.3%	4.2%	721	3.7
Other	44.8%	26.6%	21.0%	2.4%	5.2%	185	7.2
FEDERAL VOTE INTENTION							
Liberal Party	79.2%	6.0%	11.1%	2.3%	1.4%	343	5.3
Conservative Party	6.4%	83.5%	5.8%	1.1%	3.2%	297	5.7
NDP	18.8%	3.9%	70.3%	2.4%	4.6%	137	8.4
Green Party	17.2%	6.6%	9.1%	61.4%	5.7%	62	12.5
Other	24.9%	11.7%	23.3%	0.0%	40.1%	21	21.4

Methodology:

This study was conducted using Interactive Voice Response (IVR) technology, which allows respondents to enter their preferences by punching the keypad on their phone, rather than telling them to an operator.

In an effort to reduce the coverage bias of landline only RDD, we created a dual landline/cell phone RDD sampling frame for this research. As a result, we are able to reach those with a landline and cell phone, as well as cell phone only households and landline only households. This methodology is not to be confused with the increasing proliferation of non-probability opt-in online panels which have recently been incorrectly reported in major national media with inappropriate margin of error estimates.

The field dates for this survey are May 13-15, 2014. In total, a random sample of 1,111 Ontario residents aged 18 and over responded to the survey (including a sub-sample of 910 decided voters). The margin of error associated with the total sample is +/-2.9 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as sex, age, education and region). All the data have been statistically weighted by **gender, age, and education** to ensure the sample's composition reflects that of the actual population of Ontario according to Census data.