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WYNNE MAINTAINING CLEAR LEAD, NOW HOLDS UPPER HAND

[Ottawa – May 23, 2014] – The Ontario provincial campaign has settled into a pretty locked-in pattern. With a fairly high incidence of undecided voters (18 per cent), however, things could easily change and voters may be finding it hard to choose between distinct agendas: one focussed on pretty dramatic change, one focussed on minimal government and austerity (which our broader polling shows to be increasingly unpopular with a skeptical public¹), and a strong activist government model.

This choice would appear to favour Wynne, but it is confounded by another important layer to this election and that is regime fatigue and ethical issues surrounding the Liberal government under Dalton McGuinty's leadership. It is notable that Andrea Horwath's gambit of seemingly giving priority to regime fatigue and ethics in her decision to pull the plug on the government has been a major strategic error. Although there is still room for change, the locked-in pattern of this first part of the campaign does not augur well for her resuscitation. Voters have clearly been turned off by her decision here and nothing she has done to date has reversed her precipitous pratfall following her decision to vote down the government. The angry, regime-fatigued voters are squarely in Tim Hudak's camp and the pro-activist camp sees Wynne as a more plausible champion.

Clearly, all of this can still change and six points is by no means a comfortable lead. It is, however, significant and stable and the locked-in quality suggests that this is more than just a blip or an un-reflected voter response. While it would be early to say that this looks like a Liberal victory brewing, they clearly have the upper hand at this stage and there aren't a lot of obvious factors that could radically disrupt this pattern. Of course, there are still major factors to play out such as the debate and the possibility of major faux pas by one of the party leaders.

Probing the demographic and regional constituencies for the parties further reinforces the sense of steady state (at this time). Apart from seeing the anomalous Liberal lead in the North recede (this was clearly an artefact of that "one in twenty" thing we try and remind readers of), there is a high level of consistency to the regional and demographic patterns seen here. These patterns also suggest that Wynne doesn't suffer any obvious likely voter deficits in the demographics of her vote. All of her key constituencies are either as or more likely to turnout given past patterns.

HIGHLIGHTS

- **Ontario provincial vote intention:**
 - ▣ **35.8% Liberal**
 - ▣ **30.0% Progressive Conservative**
 - ▣ **20.4% NDP**
 - ▣ **11.9% Green Party**
 - ▣ **1.9% Other**

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



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¹ EKOS Research Associates, "Pensions, Values, and the Role of the State", February 21, 2014. Available online at: <http://goo.gl/INrcNq>

Hudak also has a solid turnout constituency but we frankly don't see a likely voter turnout advantage here.

On the crucial question of turnout, which will probably be the key factor shaping the final outcome of this election, demographics are instructive but at least as important is emotional engagement. Wynne is playing to the emotions of security and hope. Hudak and Horwath are tapping anger (the former more successfully). Hudak also appears to be appealing to that hopey-changey thing which is unusual, but interesting. Whether this works or not will probably be a critical factor in whether he wins voter favour. The evidence to date is that it isn't really working – yet.

Demographics patterns stable

The demographic patterns underlying party support appear to have changed little over the last week. Liberal and PC support both increase progressively with age, while support for the NDP and the Green Party seems to do the opposite. The Liberals continue to hold a clear lead with women, while the PCs are maintaining the narrowest of leads with men. The Liberals have all but won the battle for the university educated, although results suggest a much tighter race among high school and college graduates. The Liberals continue to enjoy a strong lead in the Greater Toronto Area while the PCs lead in Northeast, Central, and Eastern Ontario (given the small samples sizes in these areas, however, regional results should be interpreted with caution).

A final note on methodology

This will be the last iteration of our more basic vote intention monitoring and we feel very comfortable that our polling is a scientifically accurate portrait of what all voters are intending at this stage. But only half of these voters will actually show up and providing a reasoned conjecture of who those will be will be an additional focus of our next polls. We can say with confidence that the Green Party isn't really going to quadruple its performance in all likelihood. The more important challenge will be understanding what is the potential for change and shifting and which of the current constituencies which actually show up to vote on election day.

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



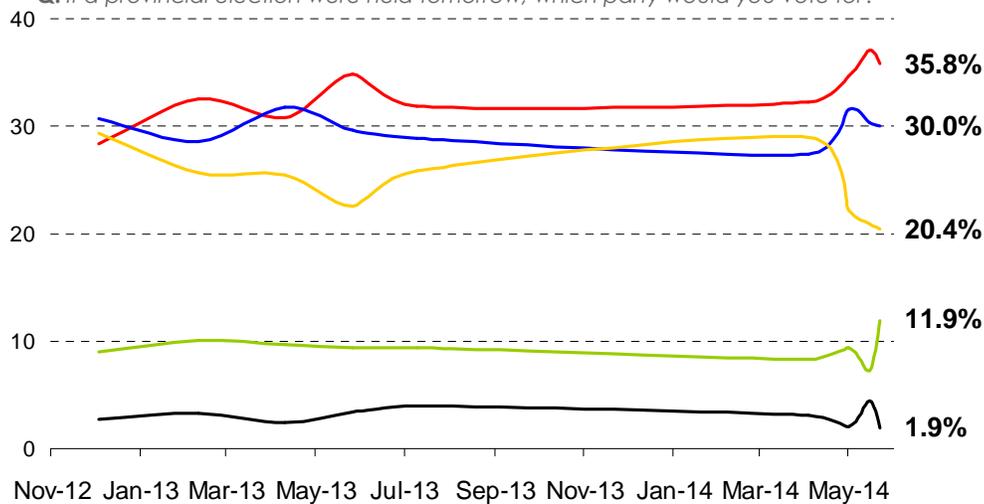
Note: The data on vote intention are based on decided and leaning voters only. Our survey also finds that 18.4% of respondents are undecided.

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BASE: Residents of Ontario; May 16-22, 2014 (n=1,215)

Tracking Ontario vote intention

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



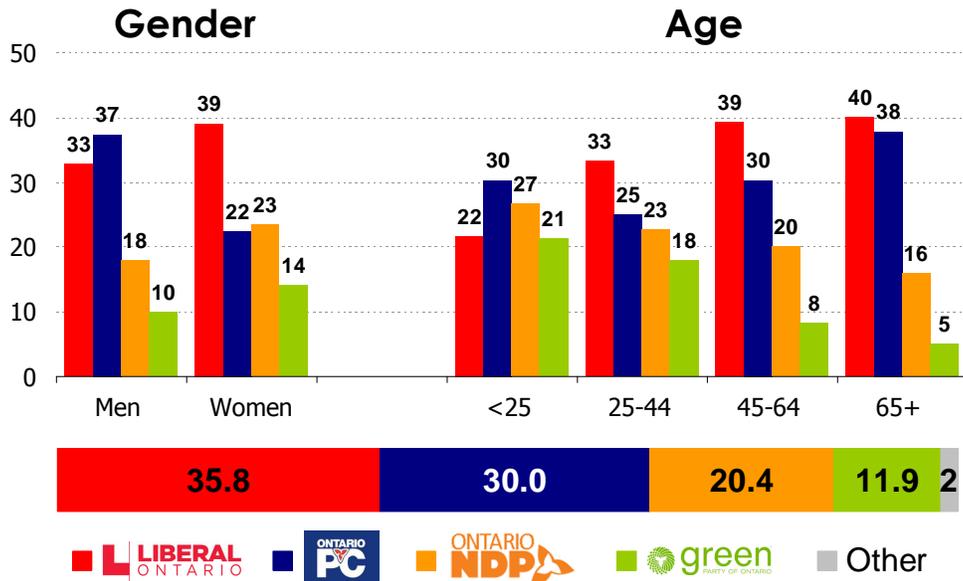
Note: The data on vote intention are based on decided and leaning voters only. Our survey also finds that 18.4% of respondents are undecided.

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BASE: Residents of Ontario; most recent data point May 16-22, 2014 (n=1,215)

Ontario vote intention by gender/age

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

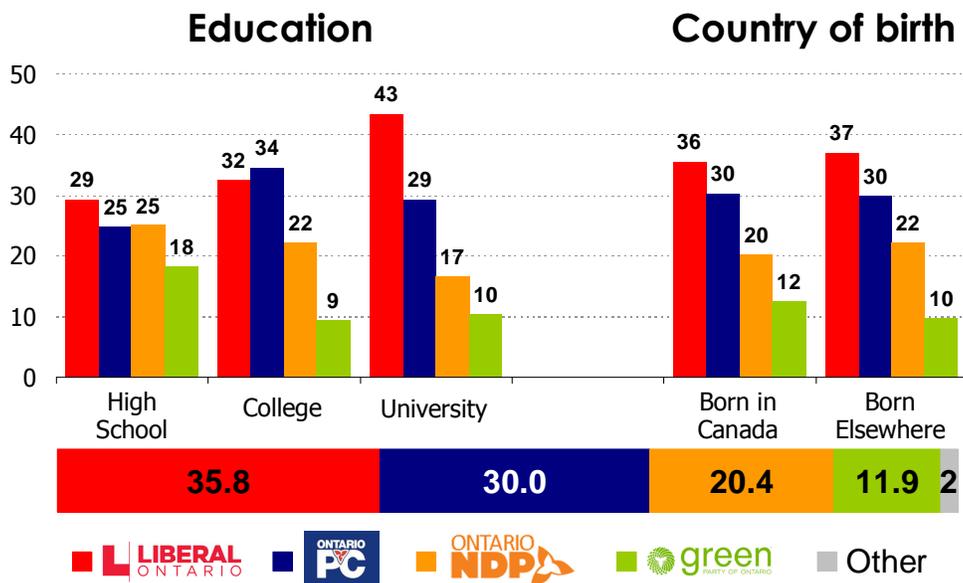


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BASE: Residents of Ontario; May 16-22, 2014 (n=1,215)

Ontario vote intention by other demographics

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

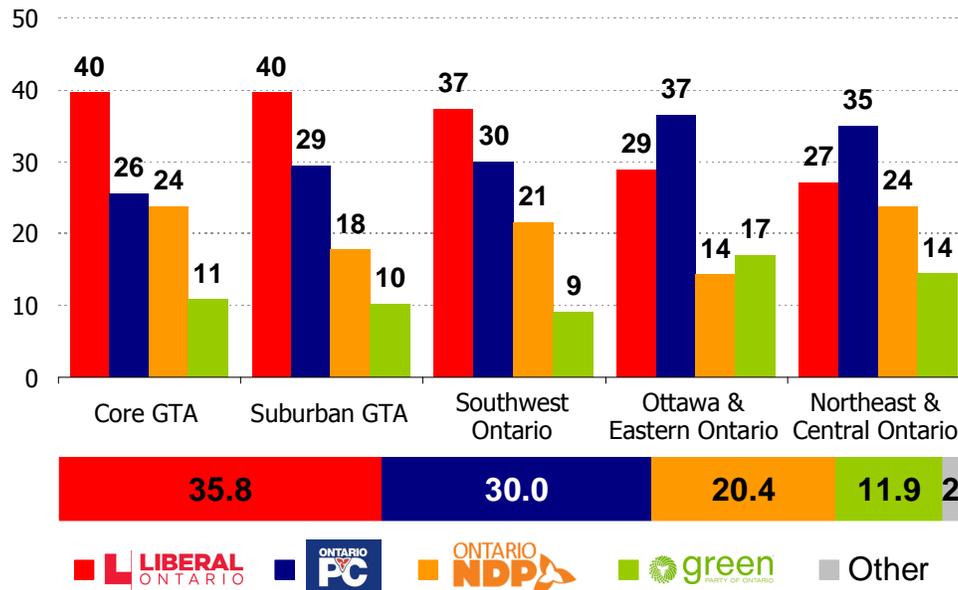


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Ontario vote intention by region

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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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	35.8%	30.0%	20.4%	11.9%	1.9%	1002	3.1
REGION							
Toronto/Core GTA	39.6%	25.5%	23.7%	10.8%	0.3%	247	6.2
Suburban GTA	39.6%	29.4%	17.6%	10.1%	3.3%	234	6.4
Southwest Ontario	37.3%	30.0%	21.4%	9.1%	2.1%	207	6.8
Ottawa and Eastern Ontario	28.8%	36.5%	14.2%	16.9%	3.6%	165	7.6
Northeast and Central Ontario	27.0%	34.9%	23.7%	14.4%	0.0%	121	8.9
Northwest Ontario	38.2%	13.4%	28.6%	17.8%	1.9%	28	18.5
GENDER							
Male	32.7%	37.3%	17.9%	9.9%	2.2%	500	4.4
Female	39.1%	22.4%	23.3%	14.1%	1.0%	494	4.4
AGE							
<25	21.7%	30.3%	26.7%	21.3%	0.0%	21	21.4
25-44	33.2%	25.0%	22.6%	17.8%	1.5%	177	7.4
45-64	39.2%	30.3%	20.0%	8.2%	2.3%	388	5.0
65+	40.0%	37.7%	15.9%	5.0%	1.3%	404	4.9
EDUCATION							
High school or less	29.3%	24.8%	25.0%	18.0%	2.9%	197	7.0
College or CEGEP	32.4%	34.4%	22.1%	9.3%	1.8%	296	5.7
University or higher	43.3%	29.3%	16.5%	10.2%	0.6%	499	4.4
COUNTRY OF BIRTH							
Canada	35.5%	30.2%	20.1%	12.4%	1.8%	754	3.6
Other	37.0%	29.8%	22.0%	9.7%	1.5%	241	6.3
FEDERAL VOTE INTENTION							
Liberal Party	75.9%	8.7%	10.1%	4.7%	0.6%	374	5.1
Conservative Party	7.1%	83.2%	3.9%	5.6%	0.3%	317	5.5
NDP	21.5%	5.9%	66.8%	5.2%	0.5%	175	7.4
Green Party	13.6%	2.7%	12.8%	69.8%	1.1%	75	11.3
Other	18.9%	0.0%	9.9%	34.8%	36.4%	12	28.3

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 16-23, 2014. In total, a random sample of 1,215 Ontario residents aged 18 and over responded to the survey (including a sub-sample of 1,002 decided voters). The margin of error associated with the total sample is +/-2.8 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.