

RDC Annual General Meeting

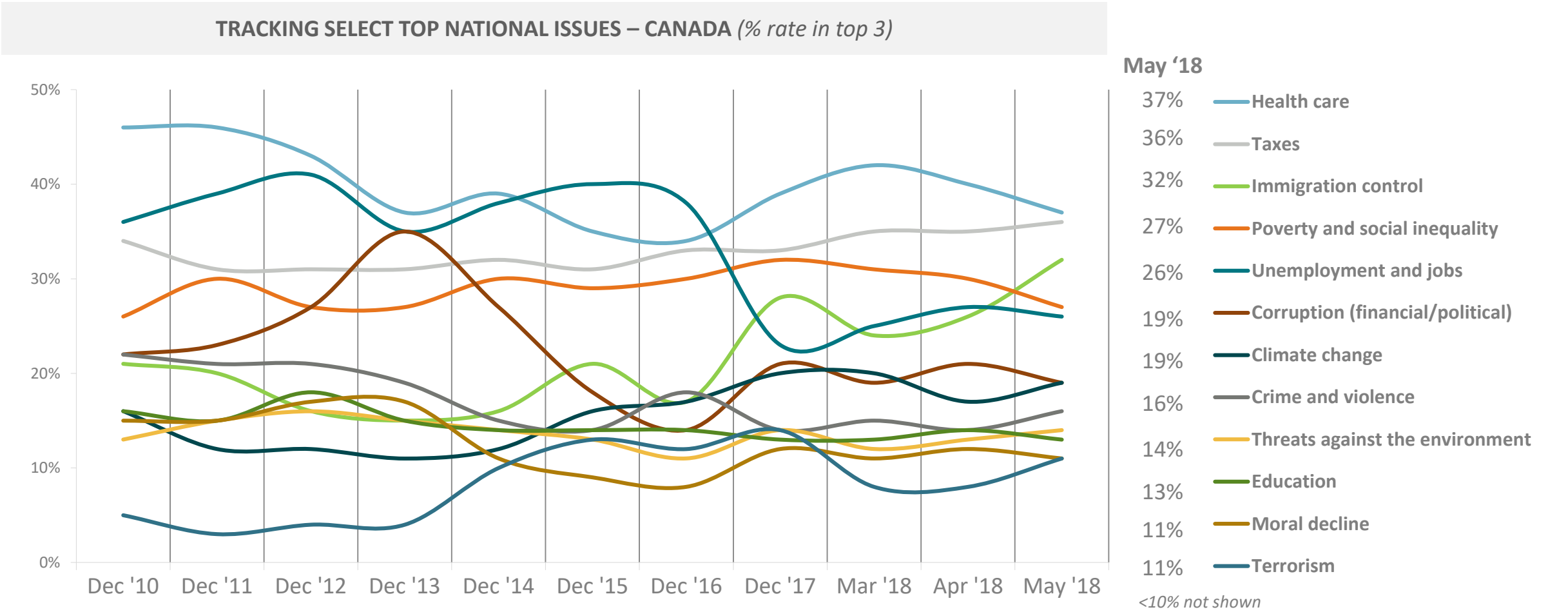
IPSOS: THE PULSE OF CANADA

SEAN SIMPSON
Vice President, Ipsos

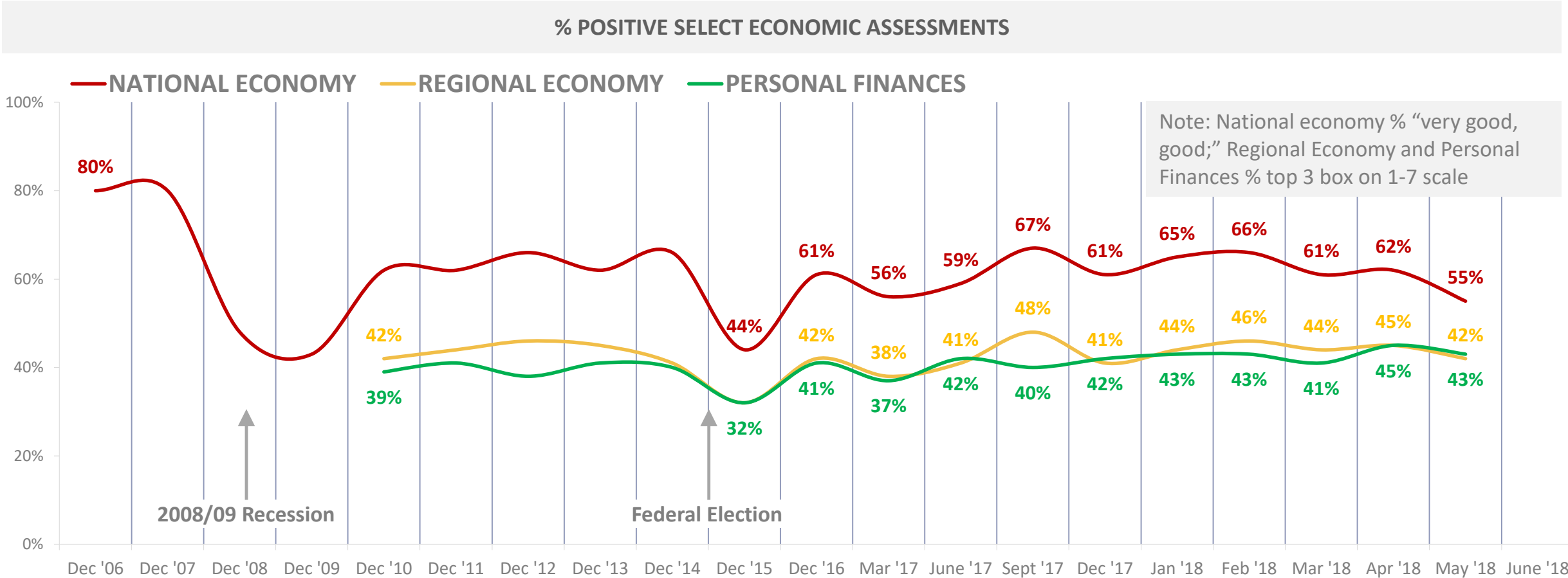
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TOP ISSUES & ECONOMIC CONFIDENCE

Healthcare maintains top spot as priority national issue, followed closely by Taxes; Immigration Control jumps into third



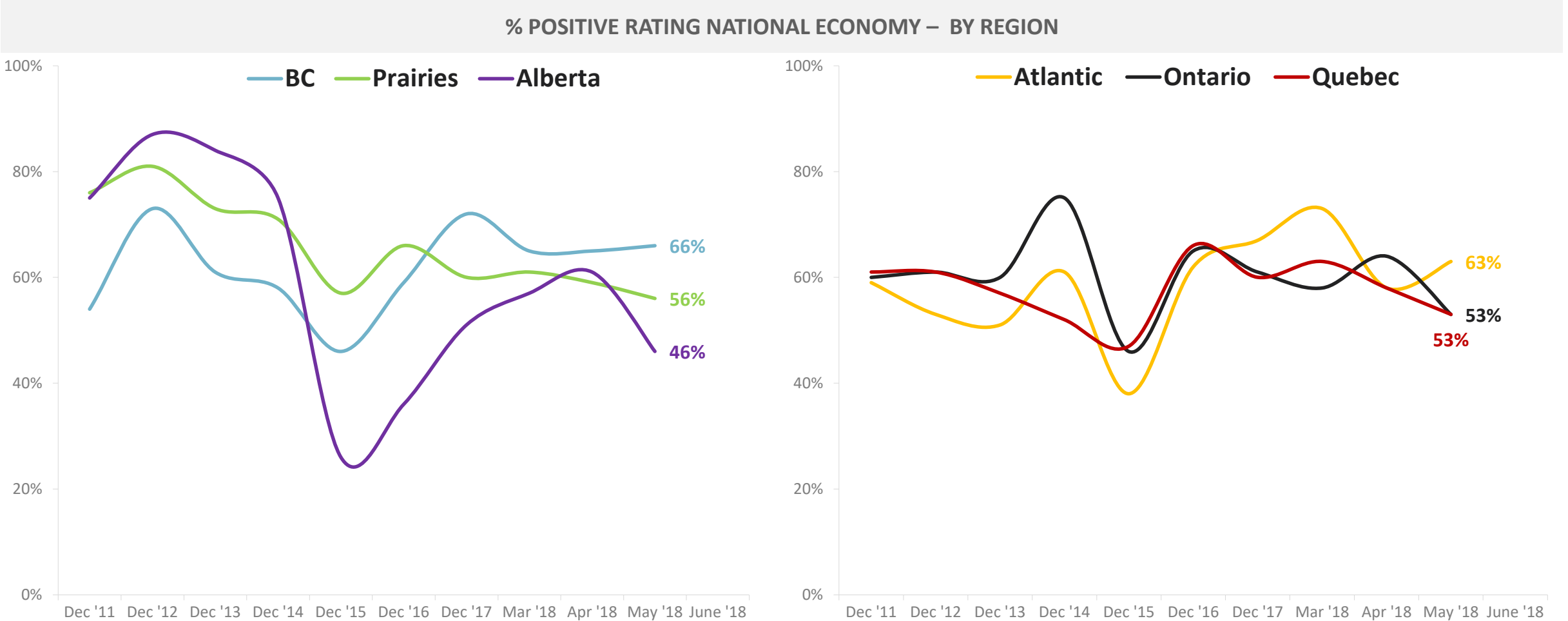
Assessments of national and regional economies and personal finances all down



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Now, thinking about our economic situation, how would you describe the current economic situation in (country)? Is it very good, somewhat good, somewhat bad, very bad?; Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.; Rate your current financial situation, using a scale from 1 to 7, where 7 means your personal financial situation is very strong today and 1 means it is very weak.

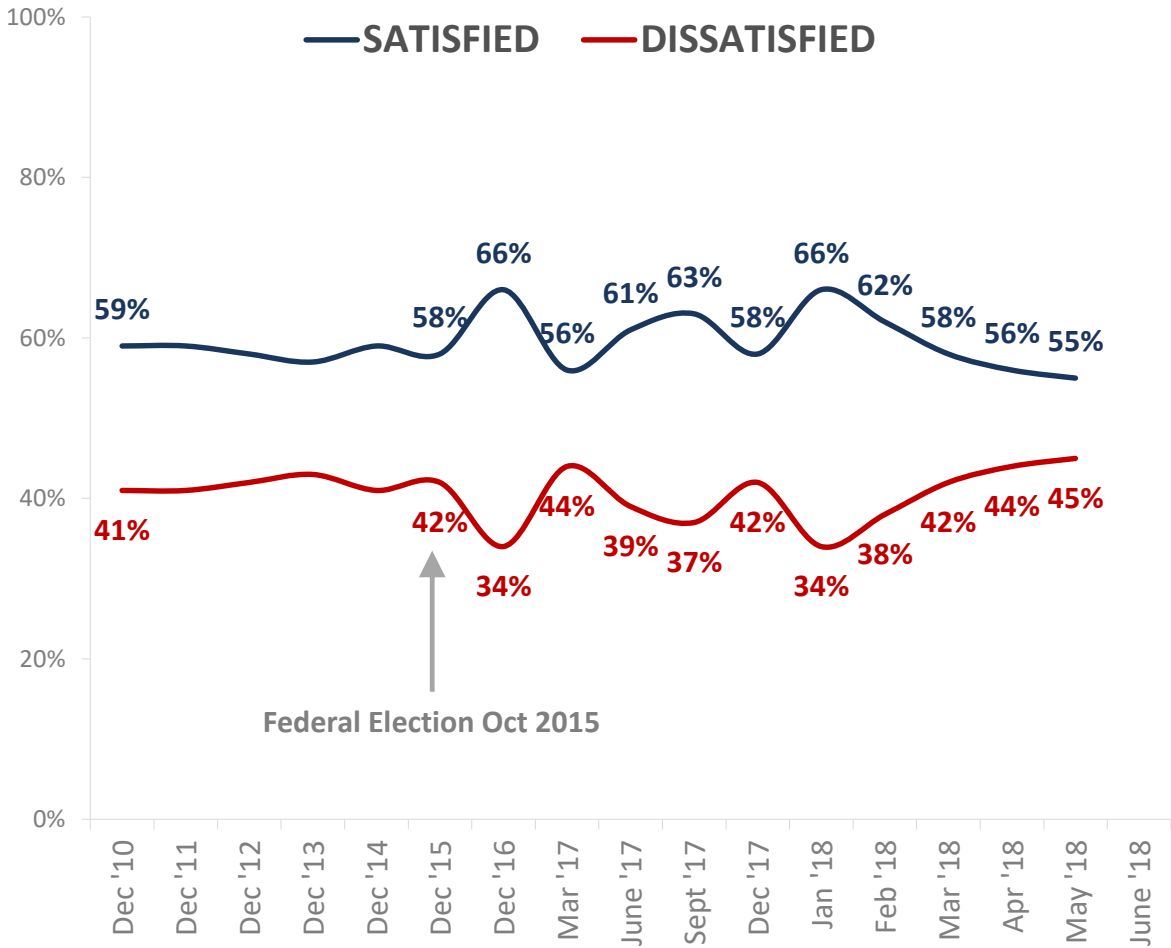
Alberta, Ontario, Quebec lead downturn in assessments of the national economy



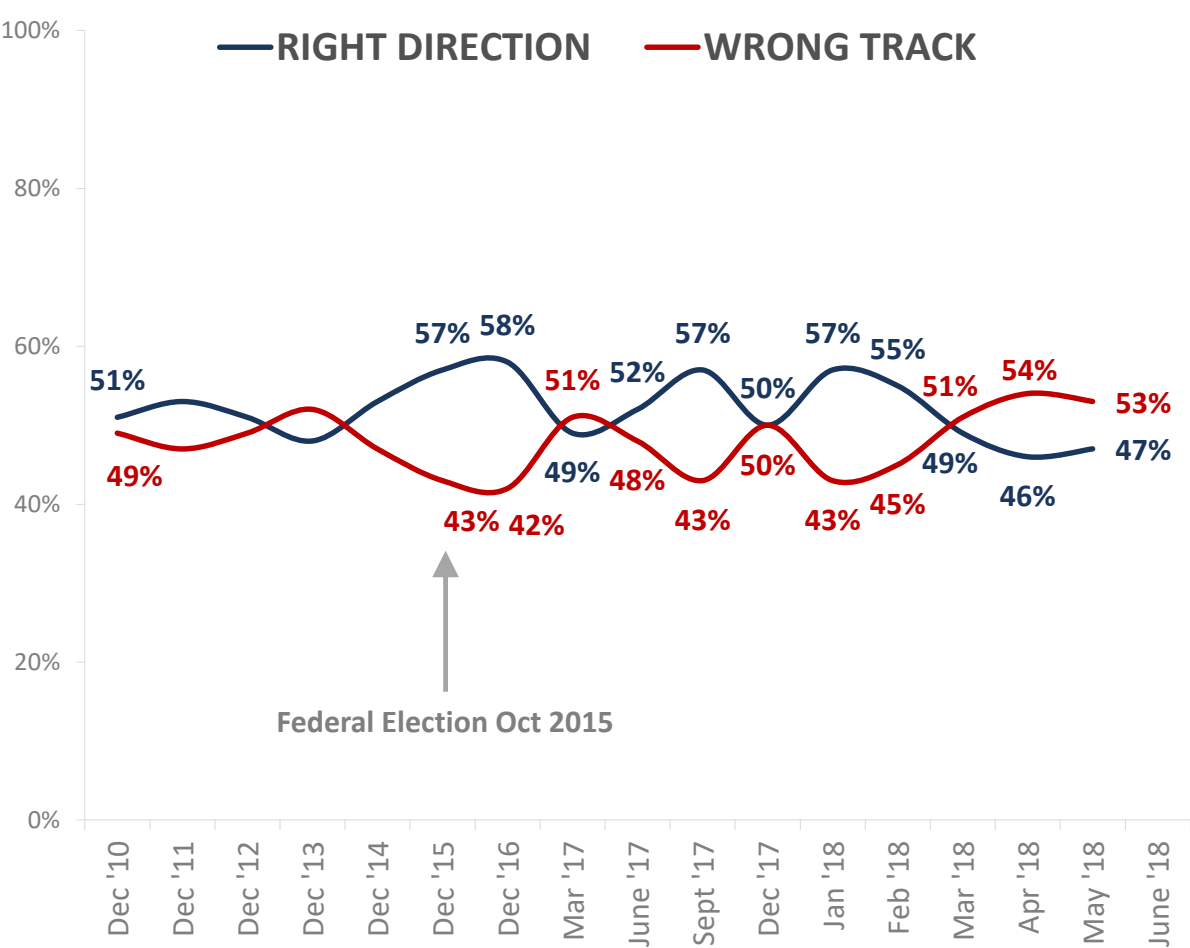
NATIONAL DIRECTION & VOTER INTENT

Majority remain satisfied with how things are going in Canada, but satisfaction continues to decline; close to highest country wrong track since 2010

OVERALL SATISFIED THINGS GOING IN CANADA

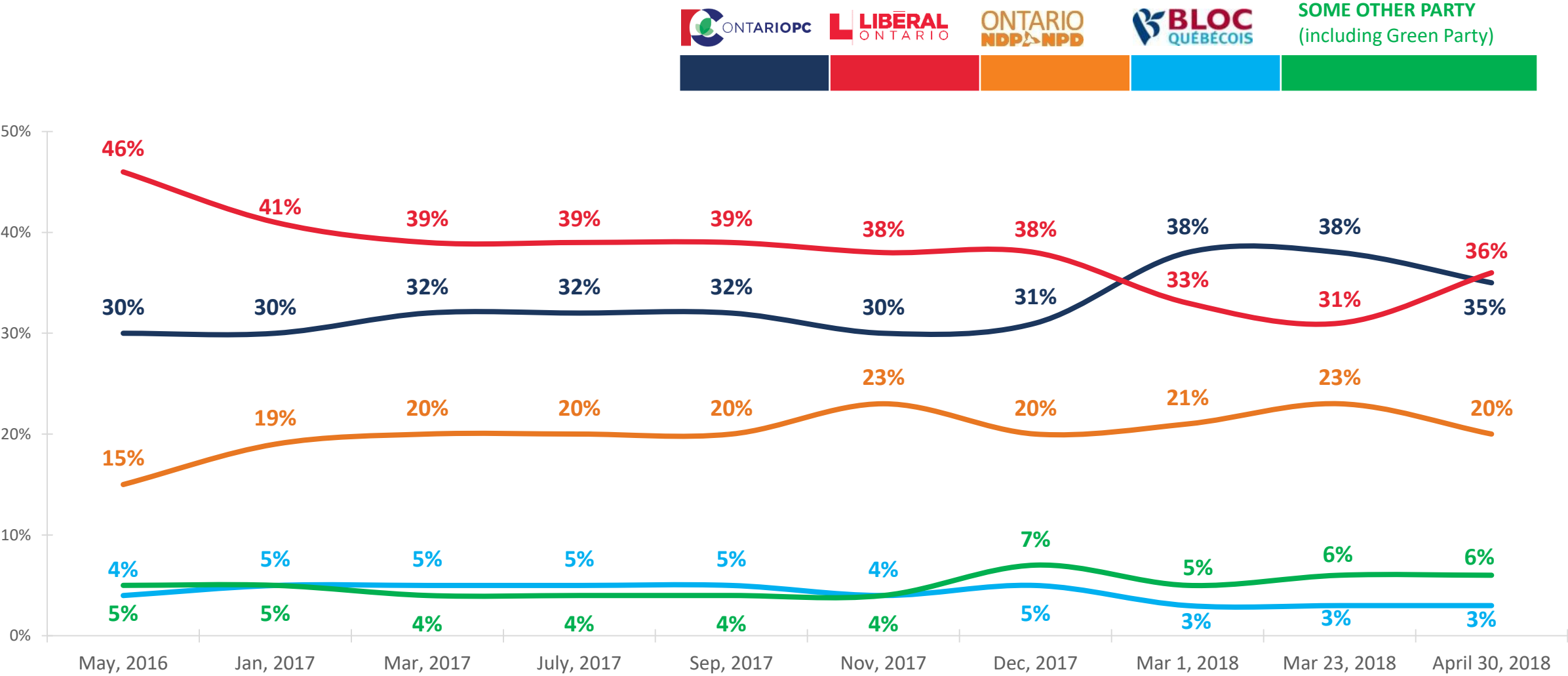


CANADA HEADING RIGHT DIRECTION OR ON WRONG TRACK



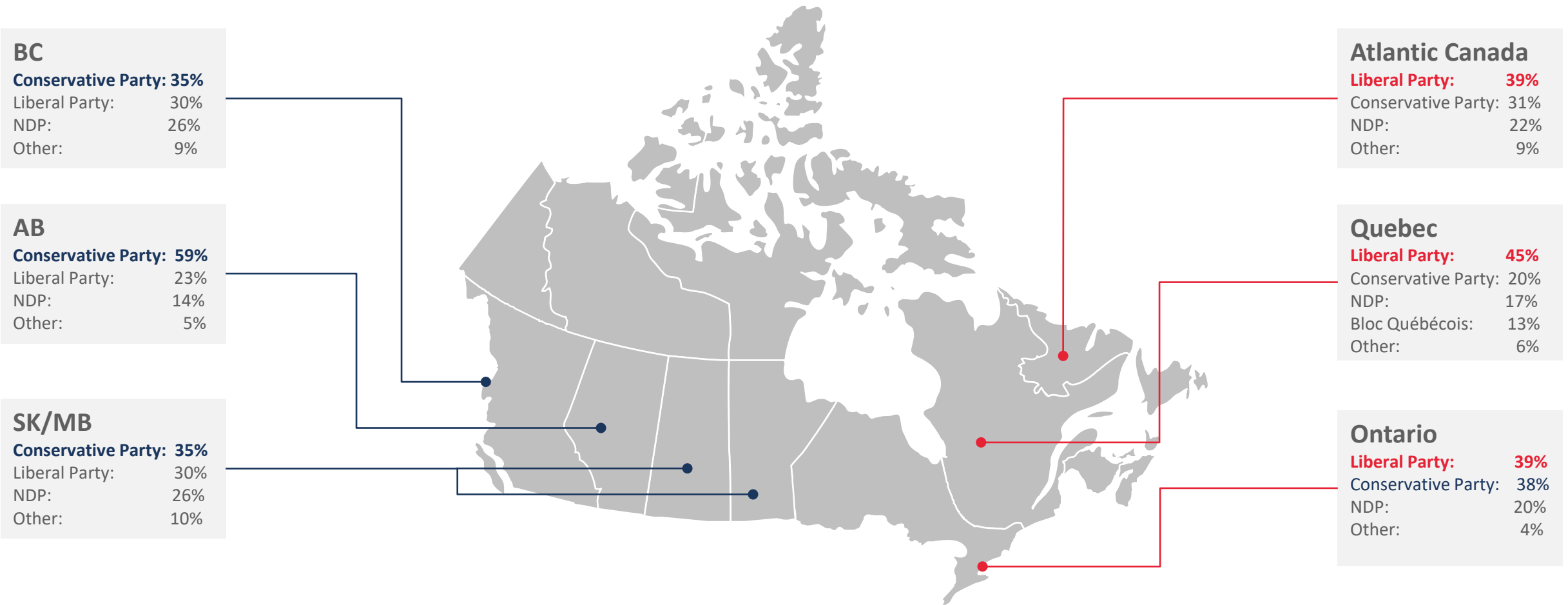
FEDERAL VOTING INTENTIONS

Liberals Rebound, Tie Tories



FEDERAL VOTING INTENTIONS – BY REGION

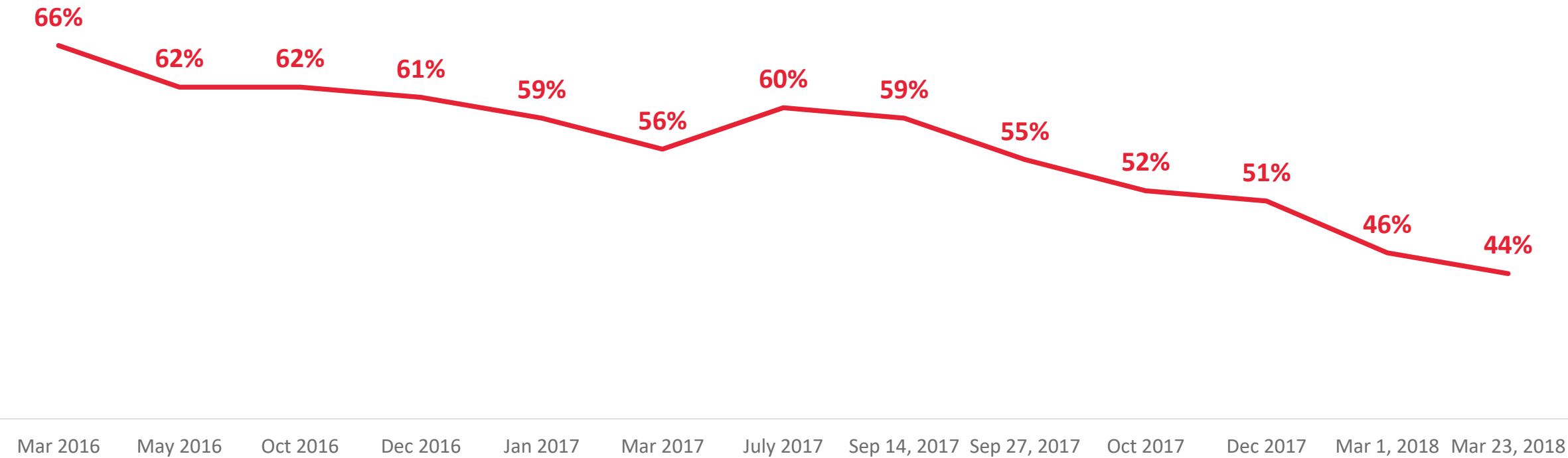
East-West split in voter intent; Ontario also split (urban-rural)



TRUDEAU GOVERNMENT APPROVAL

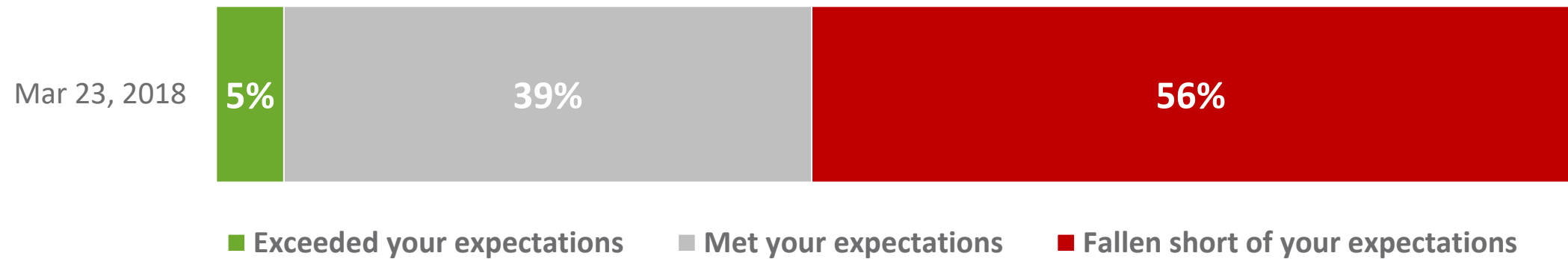
Steady long-term decline in government approval

THE PERFORMANCE OF THE LIBERAL GOVERNMENT UNDER THE LEADERSHIP OF PRIME MINISTER JUSTIN TRUDEAU



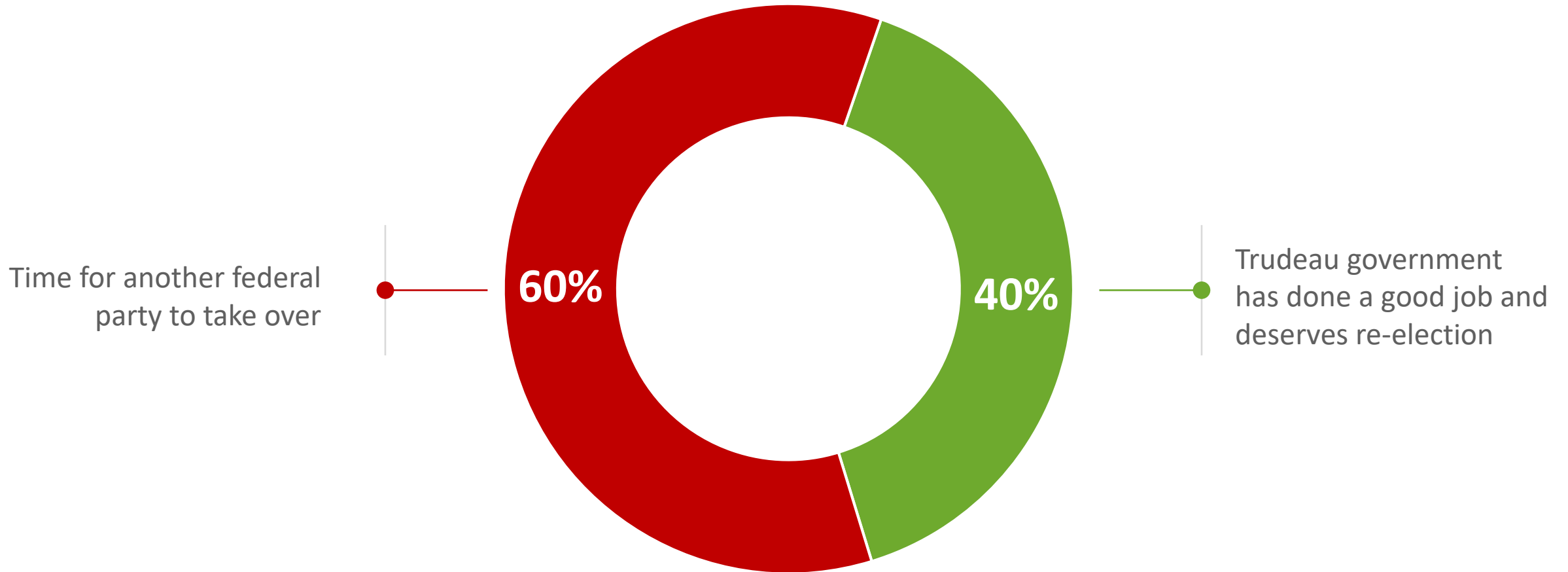
EXPECTATIONS

Half say Trudeau government has fallen short of expectations



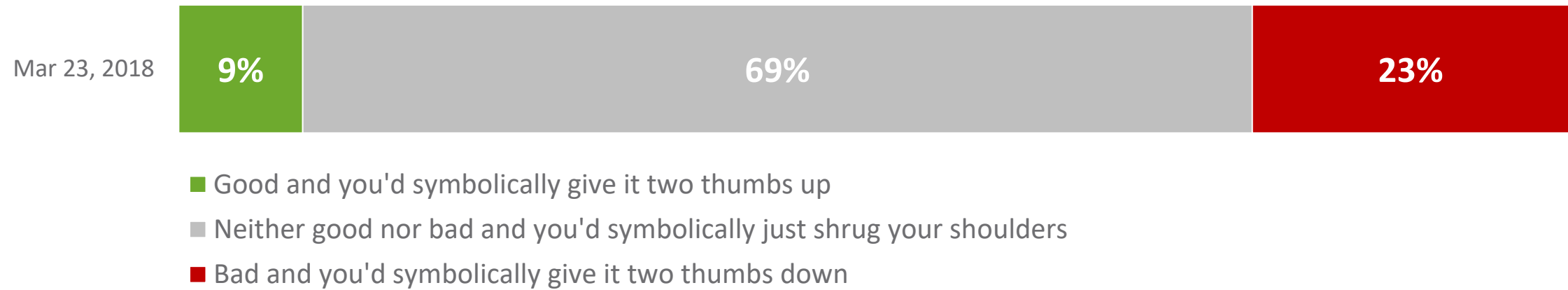
TIME FOR A CHANGE?

A majority think another party should take over



FEDERAL BUDGET

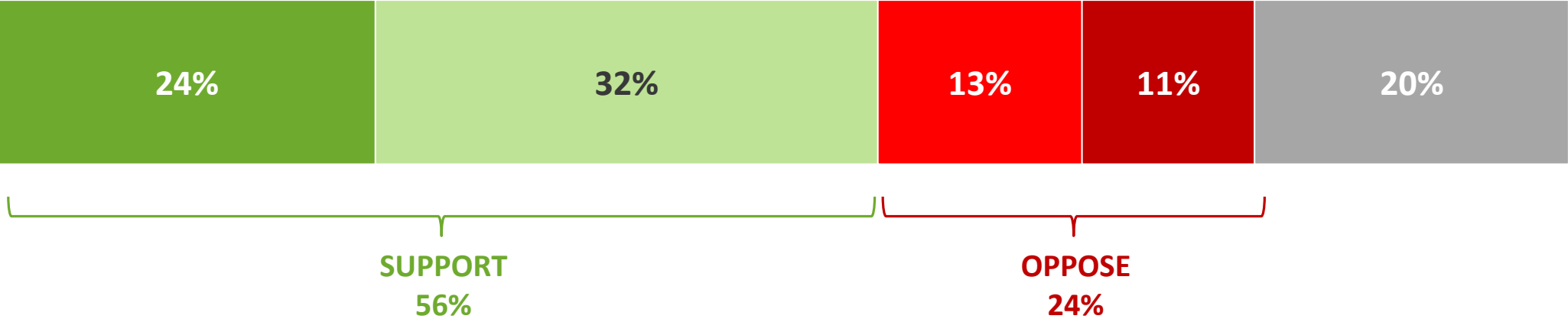
Latest federal budget fails to appeal



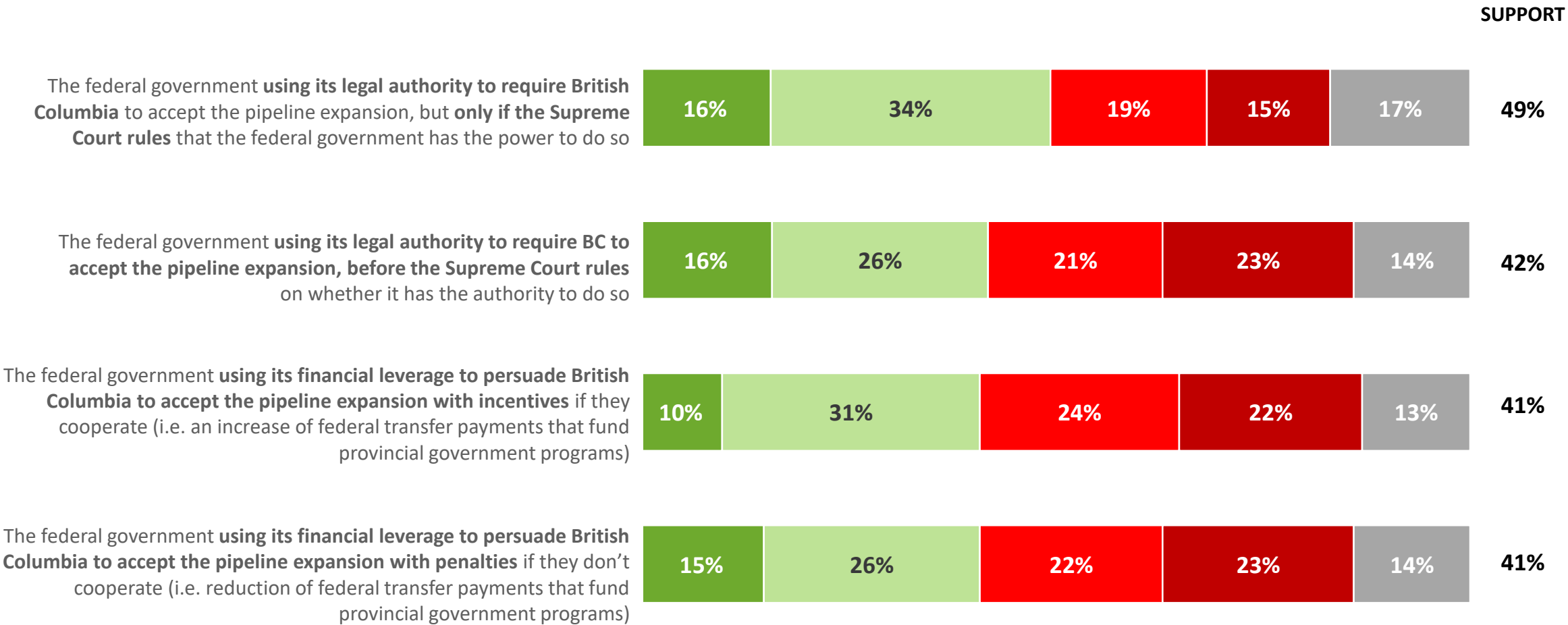
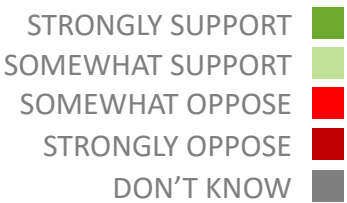
KINDER MORGAN PIPELINE

Majority (56%) supports Trans Mountain Pipeline

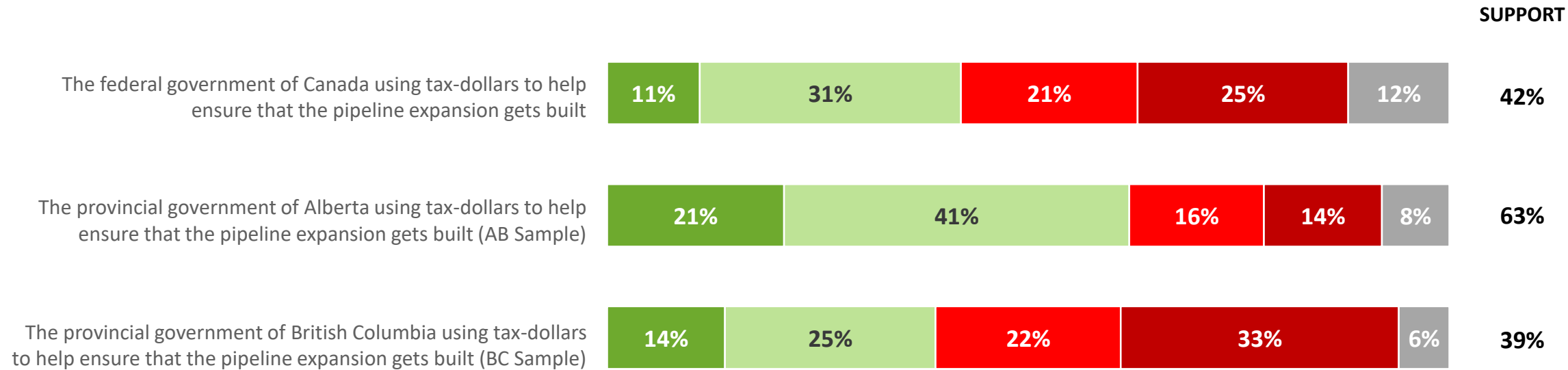
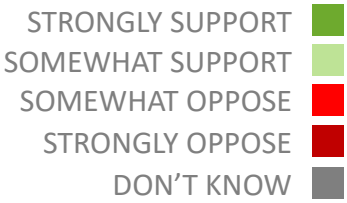
- STRONGLY SUPPORT
- SOMEWHAT SUPPORT
- SOMEWHAT OPPOSE
- STRONGLY OPPOSE
- DON'T KNOW



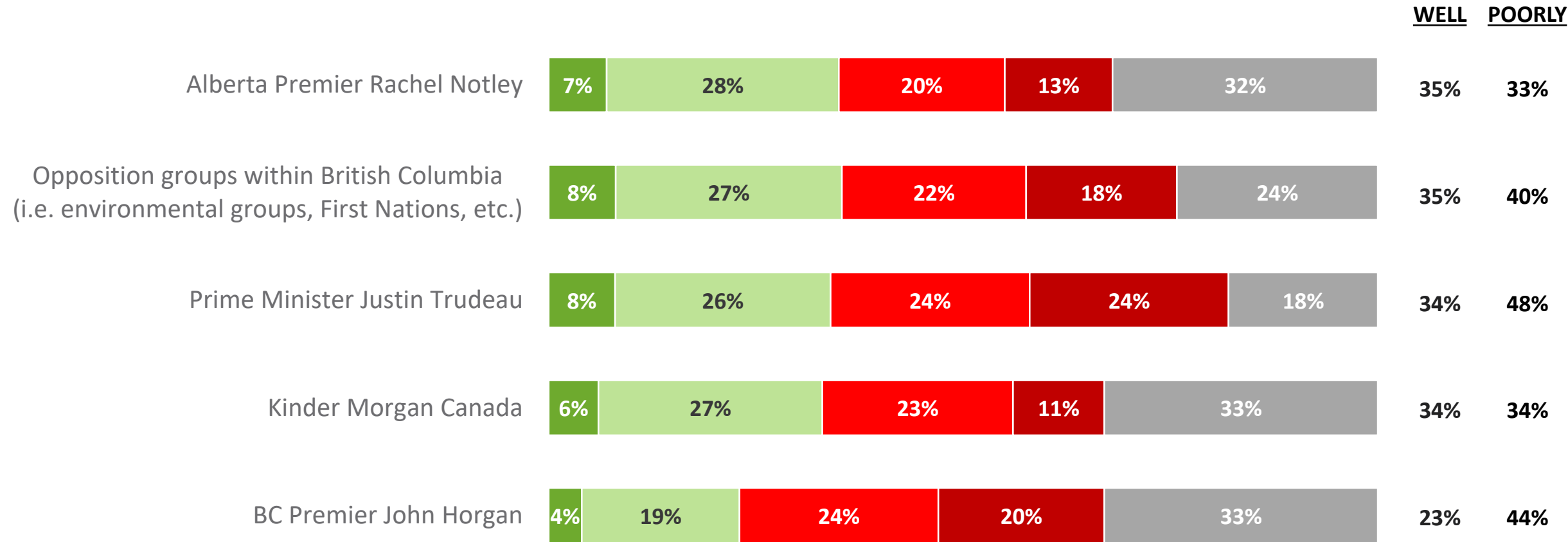
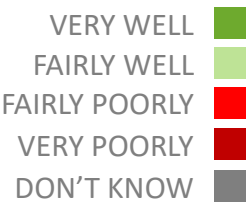
Canadians would prefer negotiated settlement to federal strongarm tactics



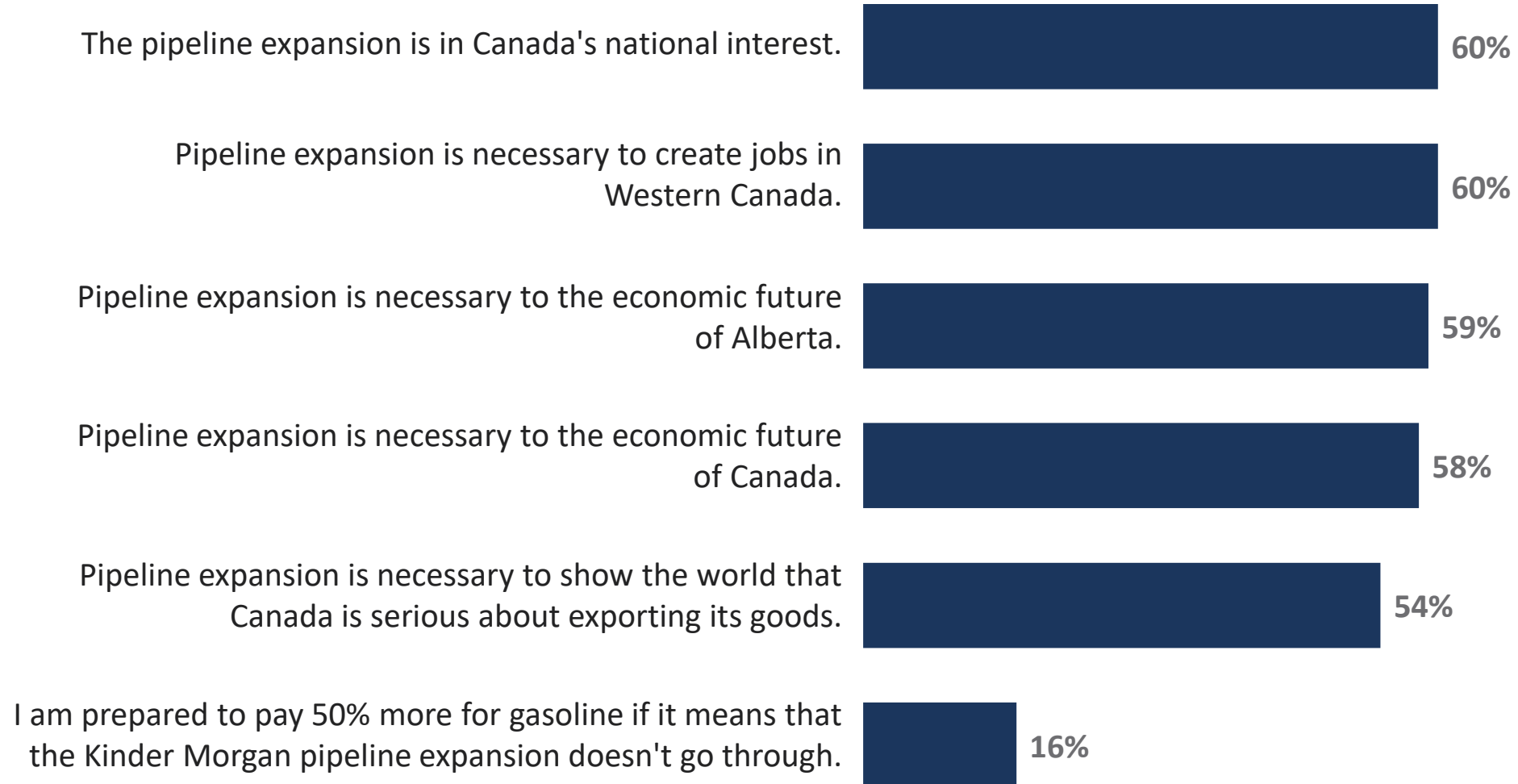
Canadians, British Columbians not hot on use of tax-dollars to build pipelines; 63% of Albertans support use of provincial money



BC Premier Horgan gets worst marks on handling of Pipeline (but popular in BC); Trudeau also viewed as poorly handling issue



Pipelines in national interest, economic imperative



Majority agrees feds can override provinces on matters of national interest; but still prefer negotiation

The federal government should have the authority to make decisions on projects deemed to be in the national interest of Canada, even if it overrides the wishes of a provincial government.



Kinder Morgan's decision to impose a May 31st deadline on deciding about the future of the pipeline was nothing more than a pressure tactic to help their profits.



The pipeline expansion should only go forward with the full consent of the First Nations whose territory the pipeline passes through.



Kinder Morgan's decision to impose a May 31st deadline on deciding about the future of the pipeline was a smart move to force the governments into taking decisive action.



The pipeline expansion should only go forward with the full consent of the government of British Columbia.



Environmental concerns are real; Canadians not confident in ability to deal with oil spill on BC Coast

The federal government should provide tax-dollars to help British Columbia prepare for and deal with environmental disasters that could occur because of increased tanker traffic.



With increased tanker traffic on the coast of British Columbia because of the pipeline expansion, I am very concerned about the potential for an environmental disaster.



The environmental concerns about the pipeline expansion outweigh the economic benefits of expanding the pipeline.



I have confidence that our governments are prepared to deal with a spill of oil in the waters off the BC coast.



Ontario Election 2018

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LIBERAL
ONTARIO



KATHLEEN WYNNE – Liberal Leader

ONTARIO
PC



DOUG FORD – PC Leader

ONTARIO
NDP



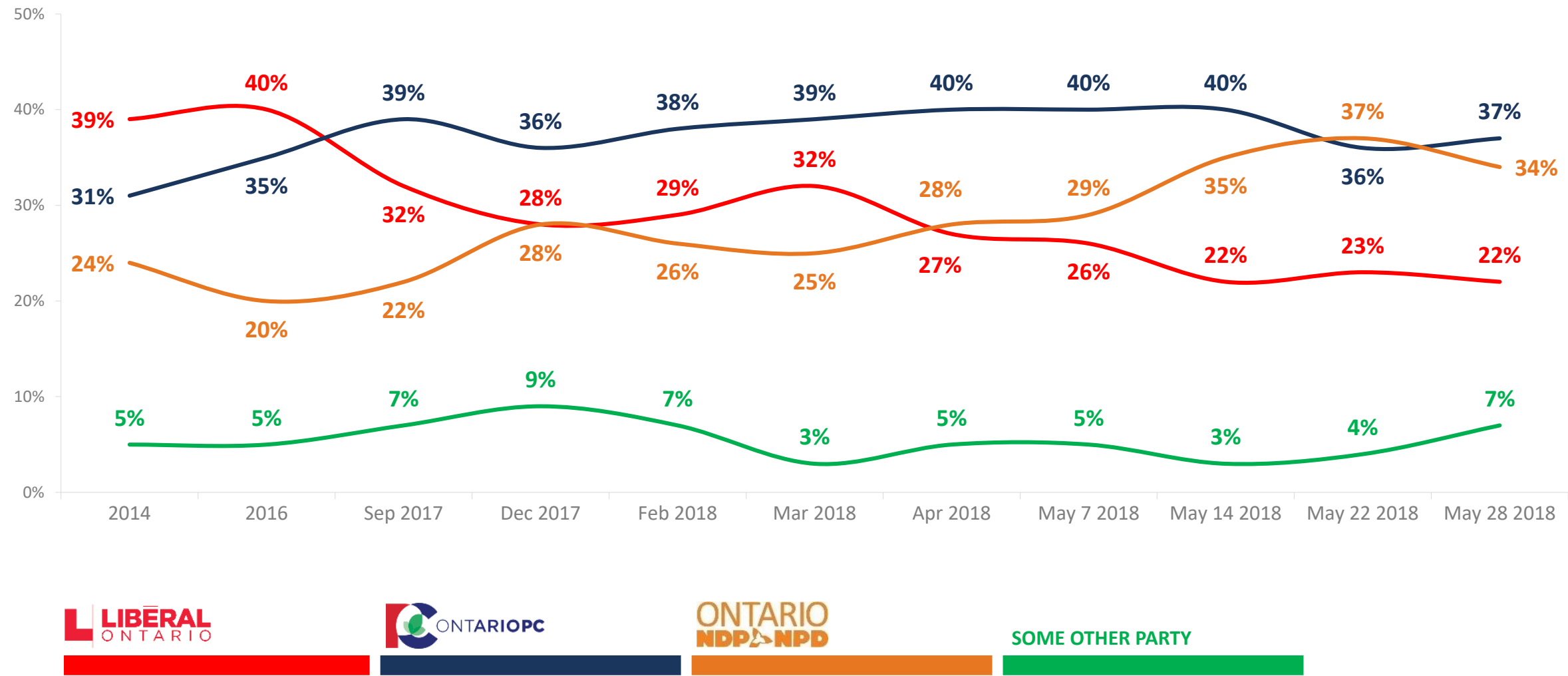
ANDREA HORWATH – NDP Leader

GAME CHANGERS



THE HORSERACE

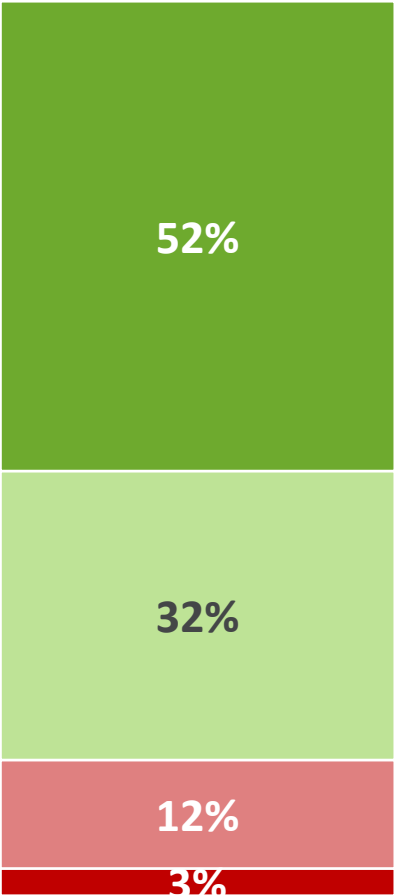
Ontario Voting Intentions – Popular Vote



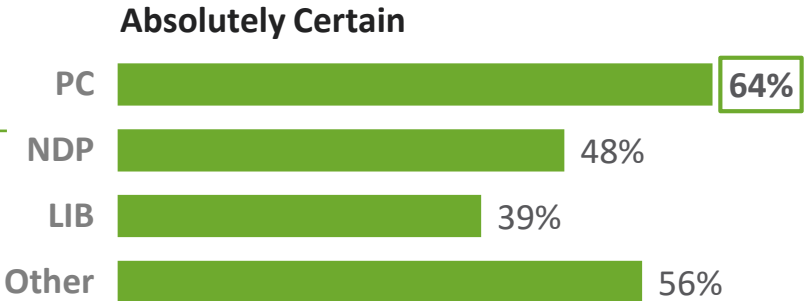
CERTAINTY OF VOTE CHOICE

Conservative Voters are most certain of their vote choice

- ABSOLUTELY CERTAIN
- FAIRLY CERTAIN
- NOT VERY CERTAIN
- NOT AT ALL CERTAIN
- DON'T KNOW



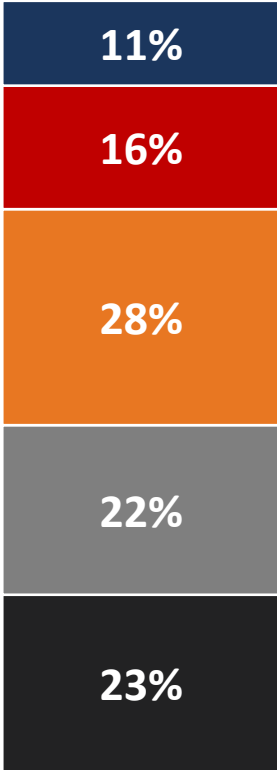
At least fairly certain: 84%



SECOND CHOICE

NDP is most-popular second choice; Tories don't have much room to grow

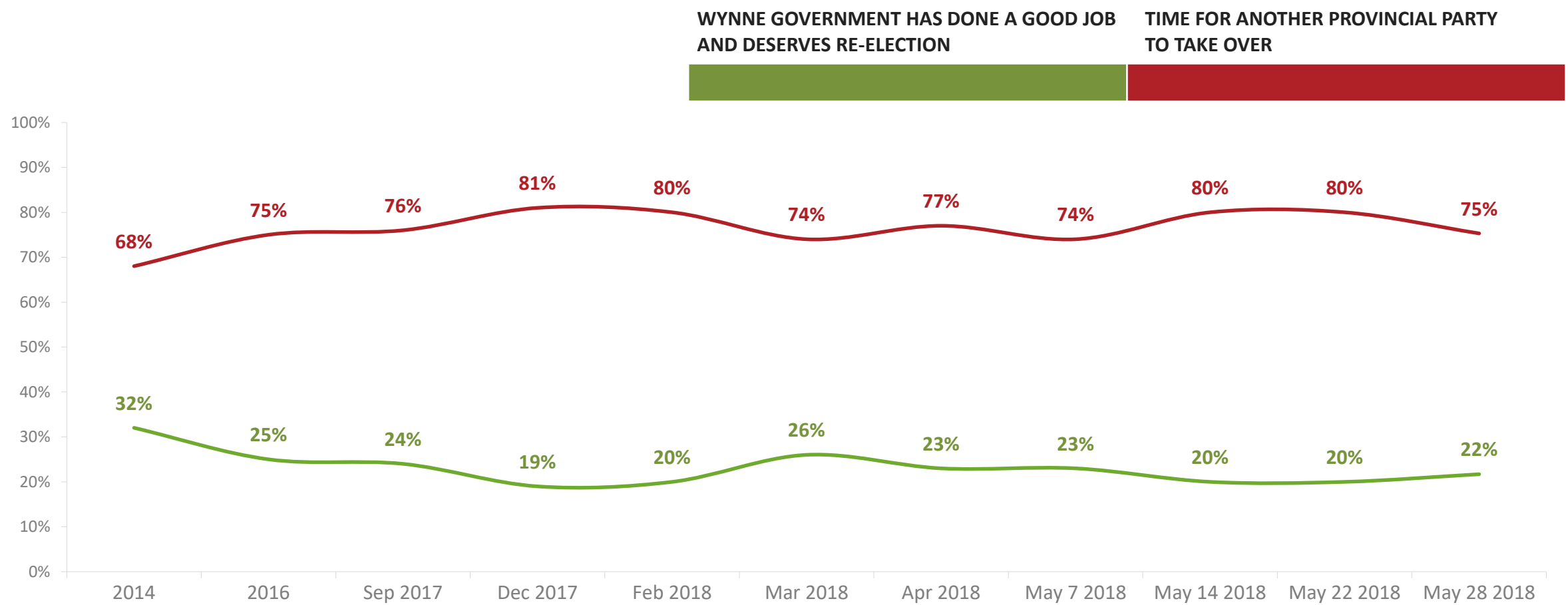
- THE PROGRESSIVE CONSERVATIVE PARTY
- THE LIBERAL PARTY
- THE NEW DEMOCRATIC PARTY (NDP)
- SOME OTHER PARTY
- DON'T KNOW/NOT SURE



BY SUPPORTERS OF EACH PARTY			
	PC	LIB	NDP
PC	-	19%	19%
LIB	8%	-	38%
NDP	32%	60%	-

TIME FOR CHANGE?

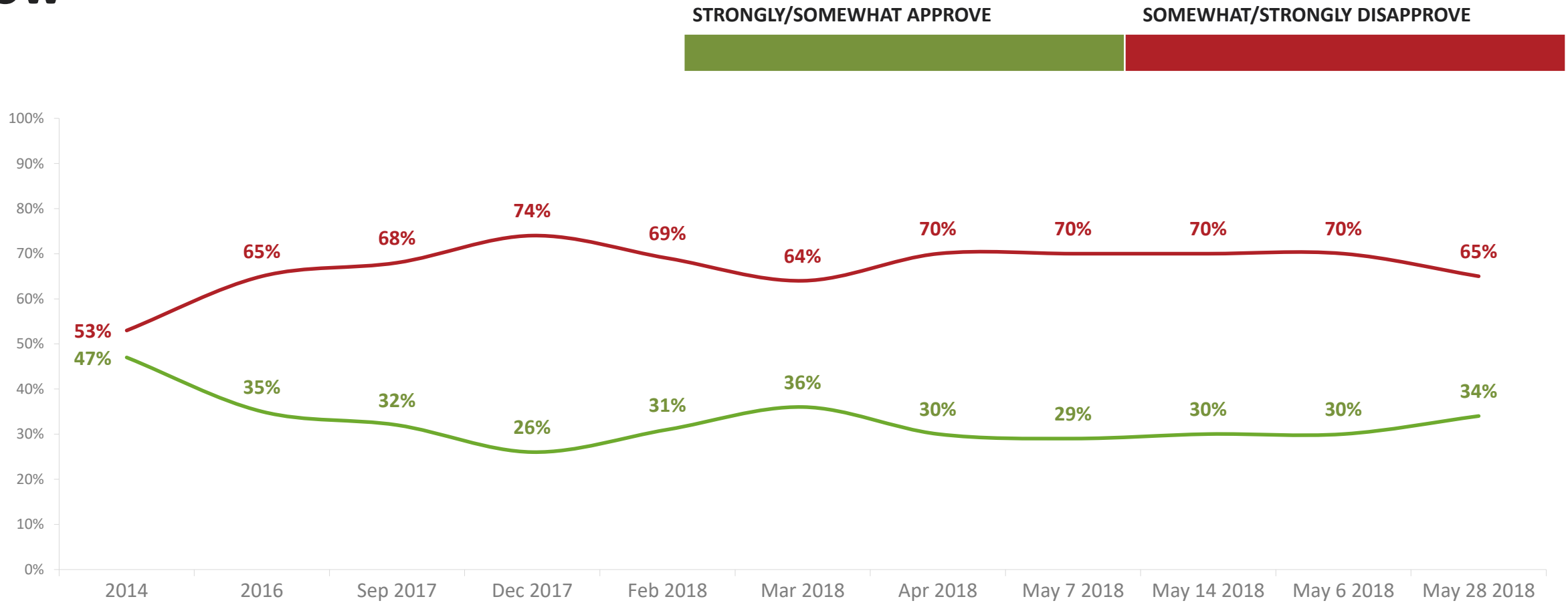
Most (75%) say it's time for a change at Queen's Park



uw7. Some/Other people say that the Liberal government under Premier Kathleen Wynne has done a good job and deserves to be re-elected during the next provincial election.... Some/Other people say that it is time for another provincial party to take over and run the province. Which of these statements is closest to your point of view?

WYNNE'S GOVERNMENT'S APPROVAL RATINGS

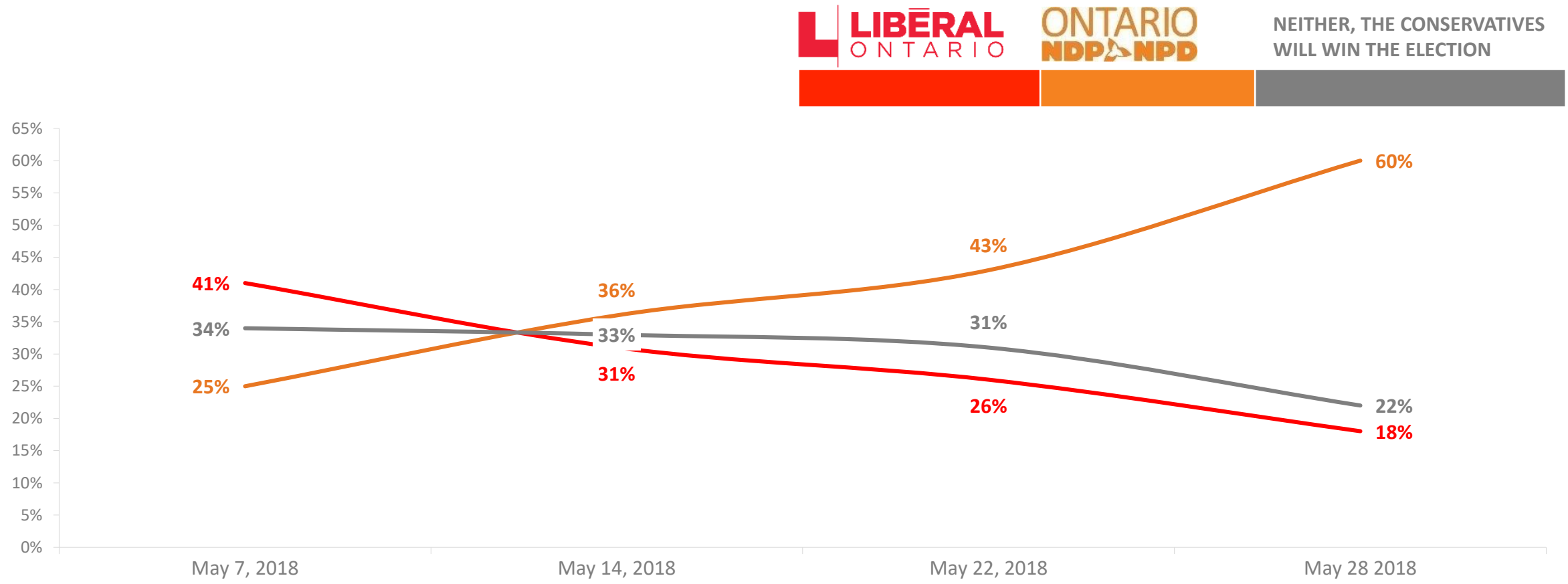
Approval ratings of the Wynne Government's performance remains low



WHO CAN STOP DOUG FORD AND THE PCS?

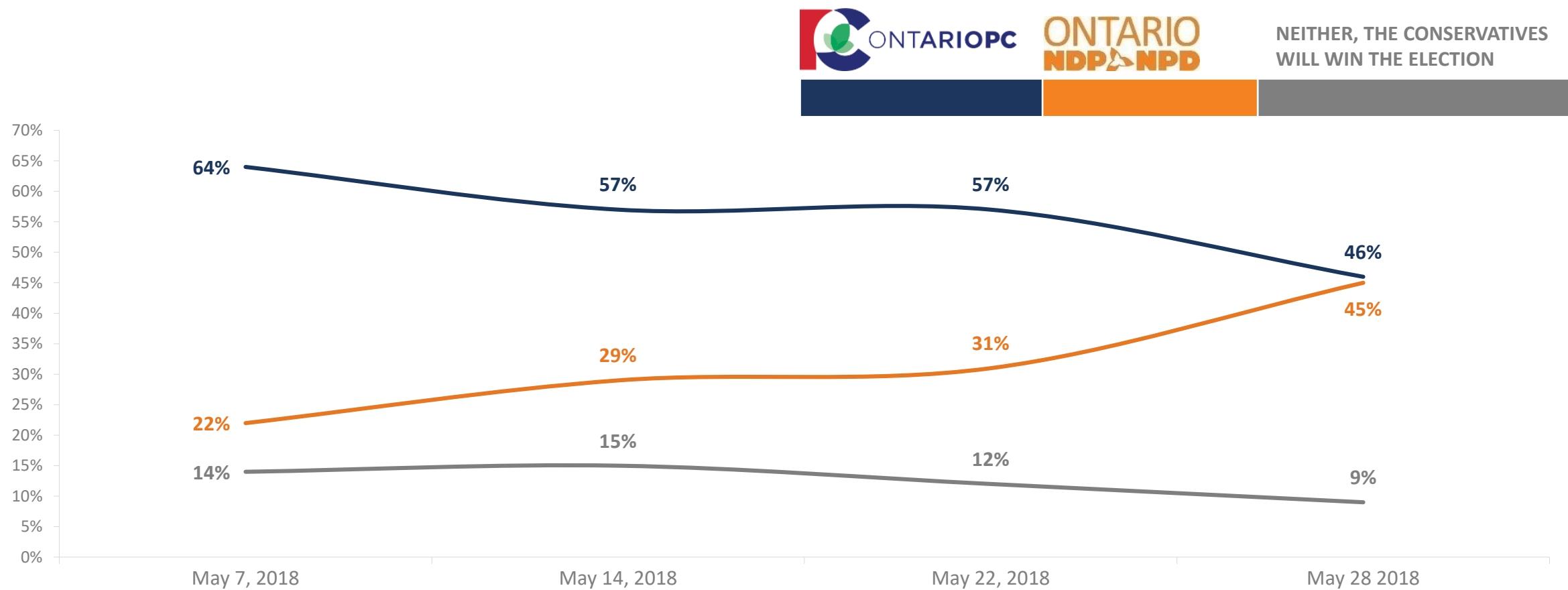
NDP is chosen as the party with the best chance to stop Doug Ford and the PCs.

This was a turning point in the campaign.



WHO CAN DEFEAT KATHLEEN WYNNE AND THE LIBERALS?

PCs, NDP now tied as agents of change – a monumental shift

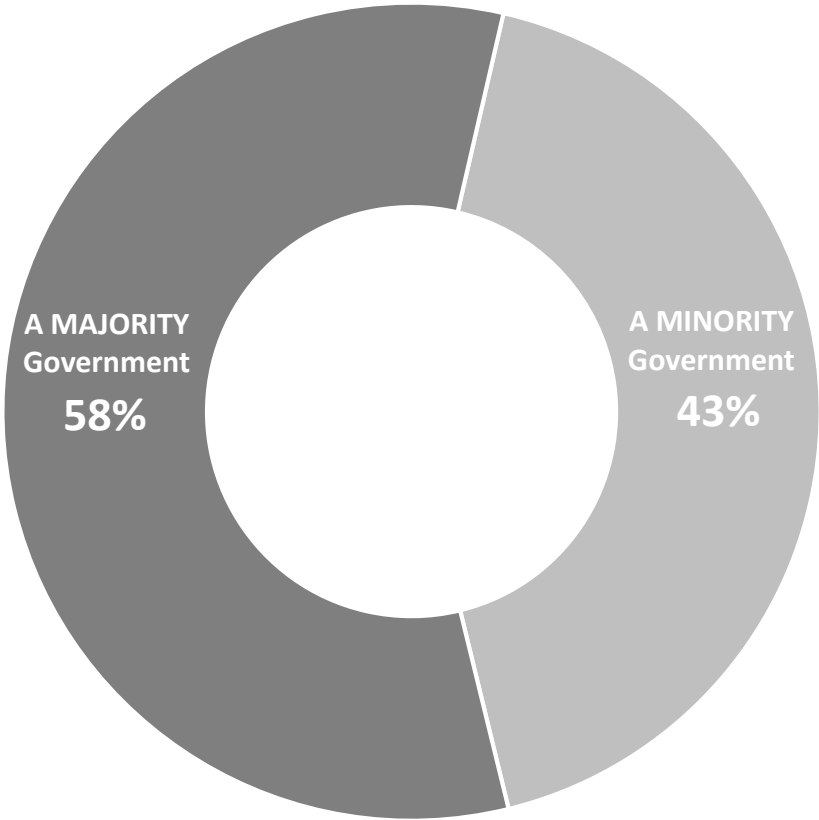
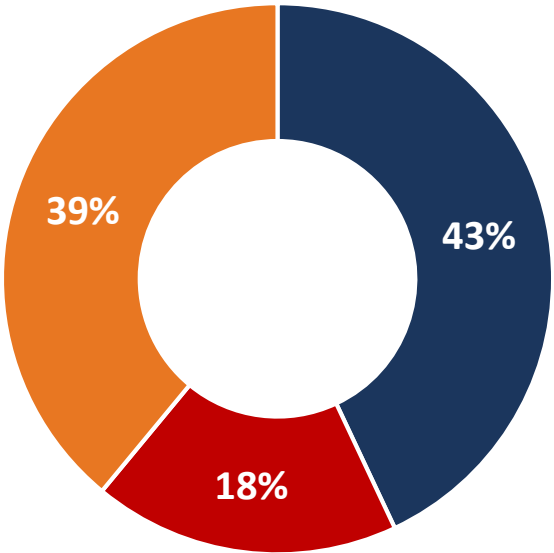


BEST OUTCOME OF ELECTION

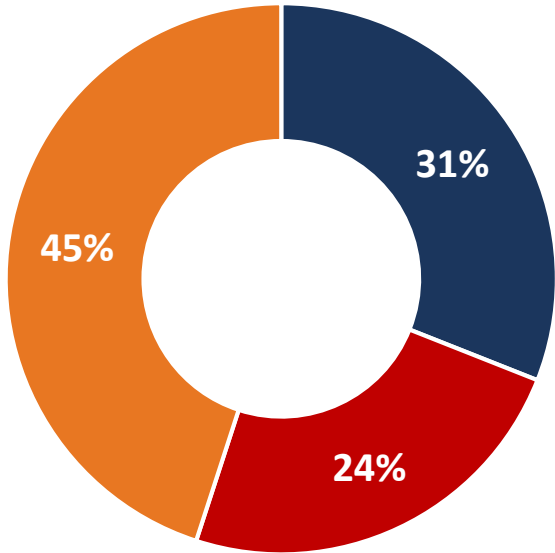
Majority wants majority (but election didn't start that way)

- THE PROGRESSIVE CONSERVATIVE PARTY
- THE LIBERAL PARTY
- THE NDP PARTY

Saying MAJORITY

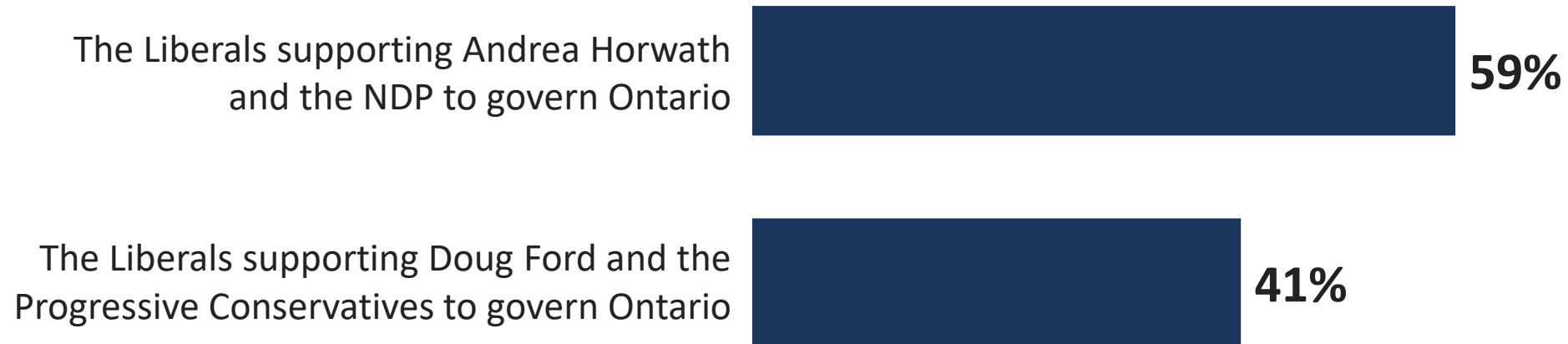


Saying MINORITY



BEST OUTCOME OF ELECTION

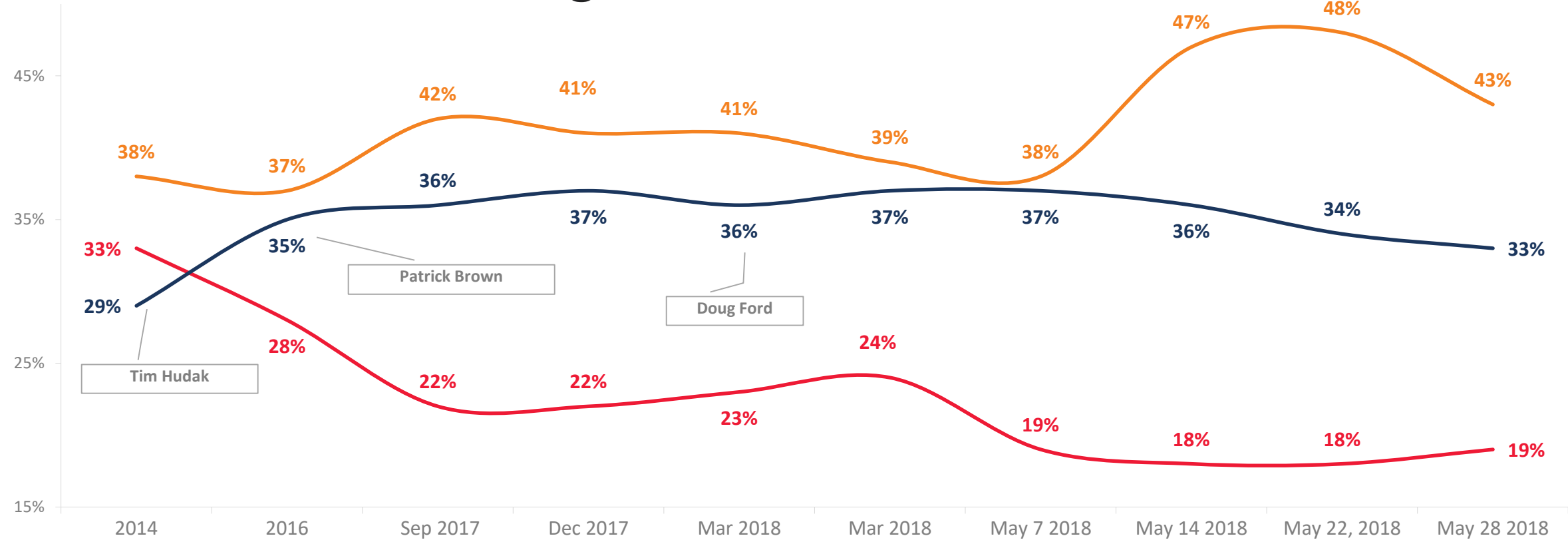
What Would You Rather See Happen?



THE LEADERS

BEST PREMIER OF ONTARIO

Horwath has commanding lead as Best Premier





KATHLEEN WYNNE – Liberal Leader



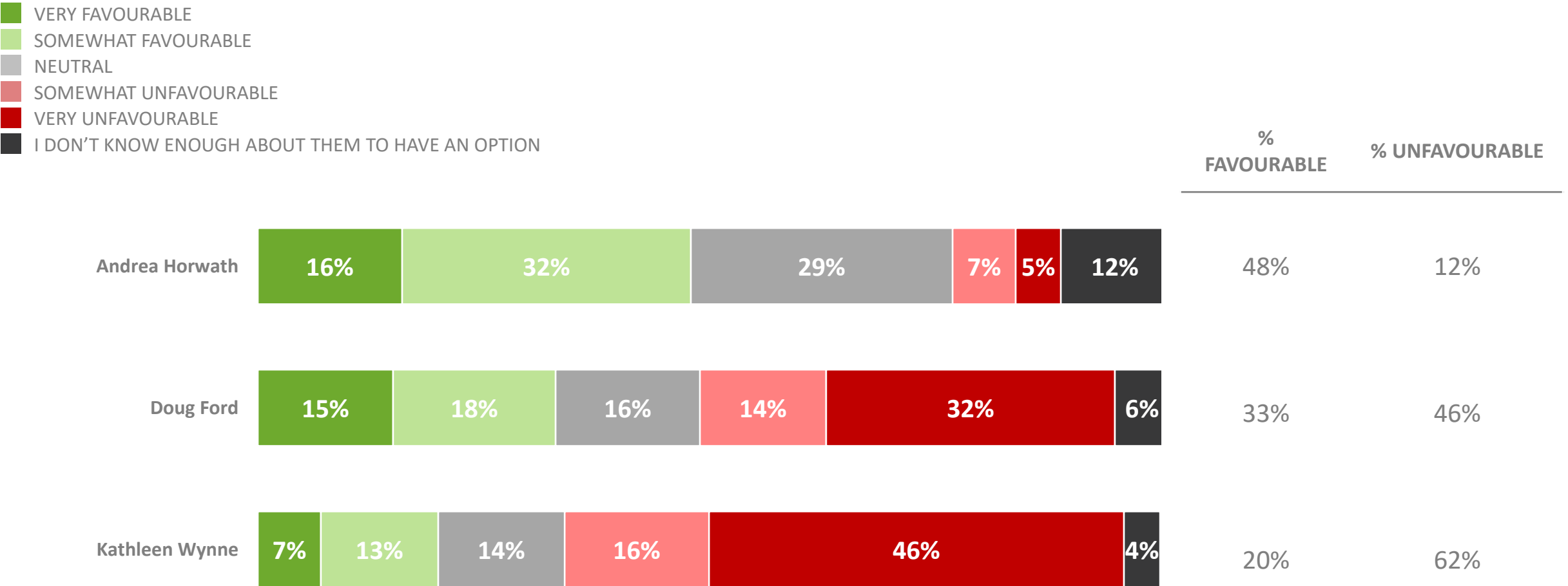
DOUG FORD – PC Leader



ANDREA HORWATH – NDP Leader

IMPRESSION OF LEADERS

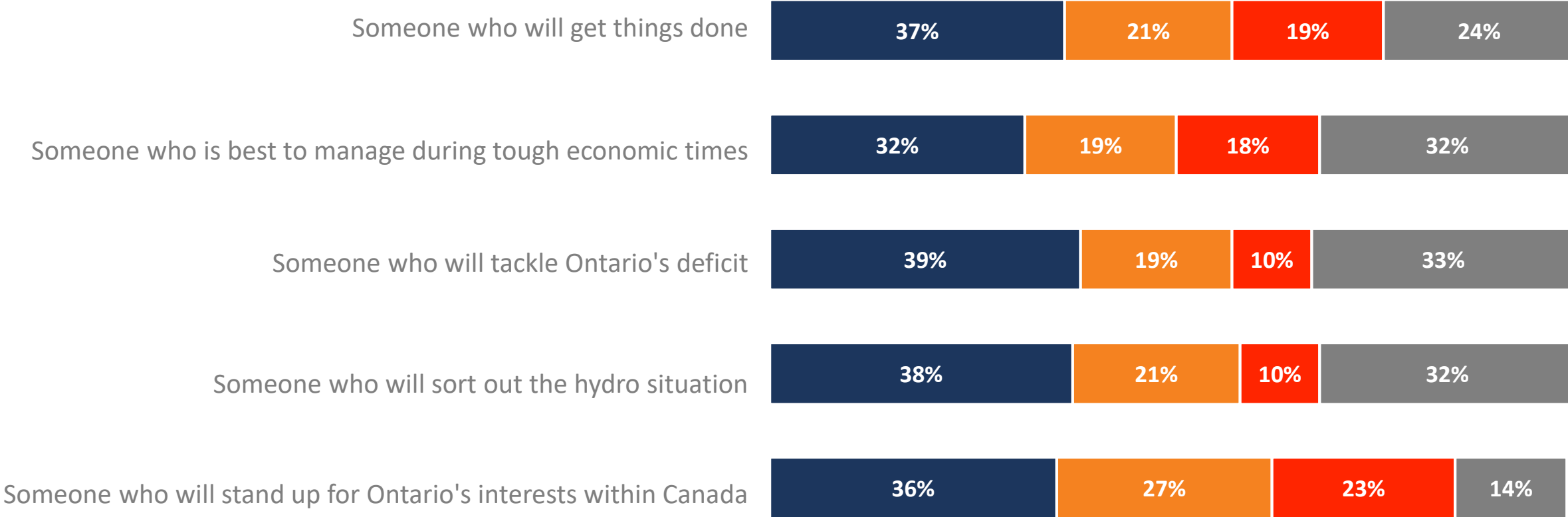
Horwath seen as Most Favourable Leader; Wynne Seen Unfavourably



PROVINCIAL LEADERSHIP ATTRIBUTES

Ford Advantage

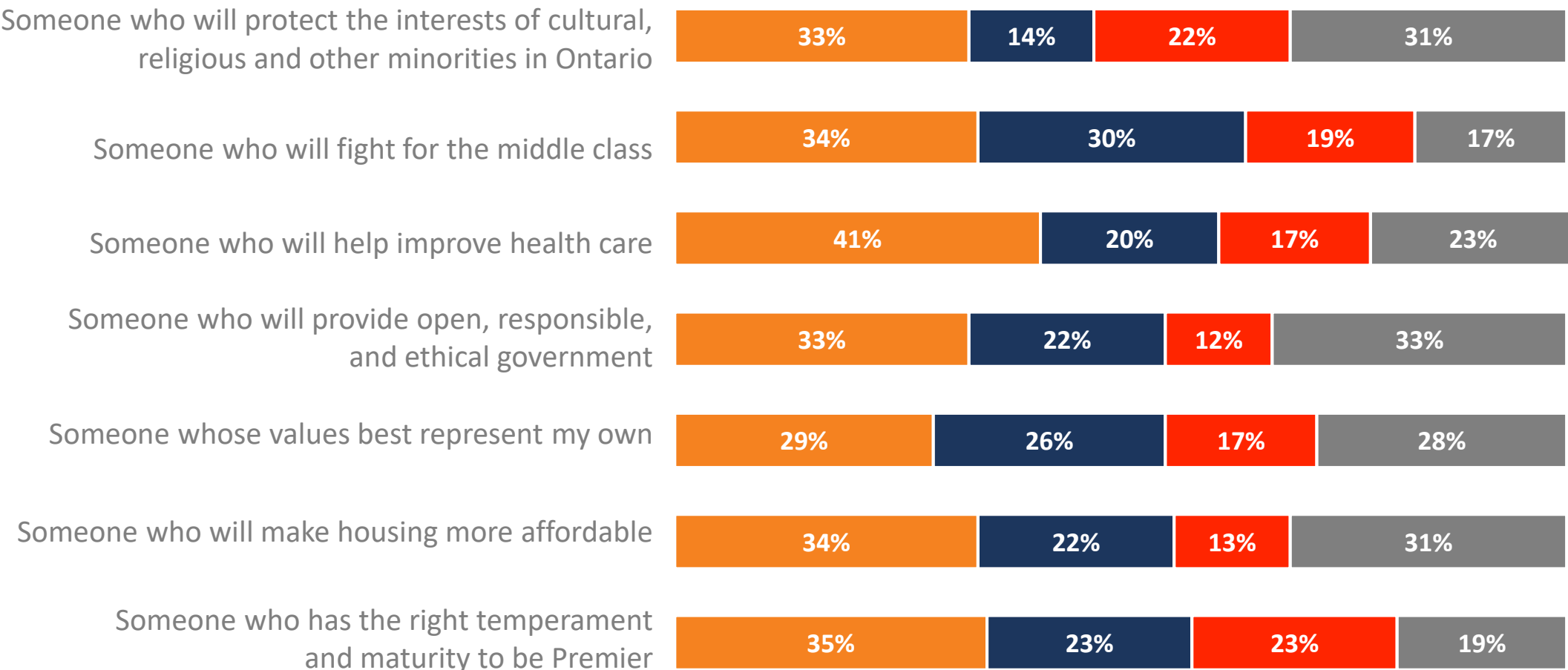
DOUG FORD
ANDREA HORWATH
KATHLEEN WYNNE
NONE OF THESE LEADERS



PROVINCIAL LEADERSHIP ATTRIBUTES





Horwath Advantage

ANDREA HORWATH
DOUG FORD
KATHLEEN WYNNE
NONE OF THESE LEADERS



PROVINCIAL LEADERSHIP ATTRIBUTES

Wynne Advantage???

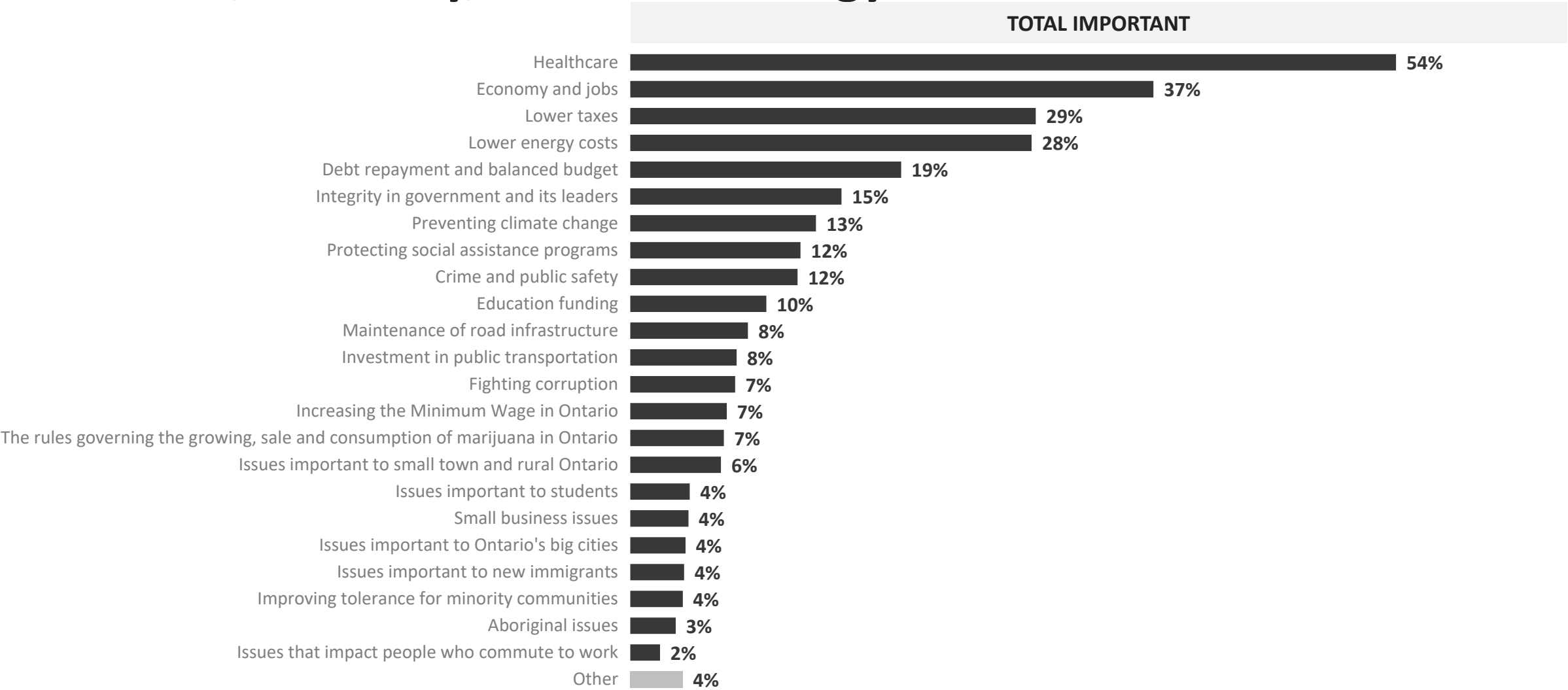
- KATHLEEN WYNNE 
- DOUG FORD 
- ANDREA HORWATH 
- NONE OF THESE LEADERS 



THE ISSUES

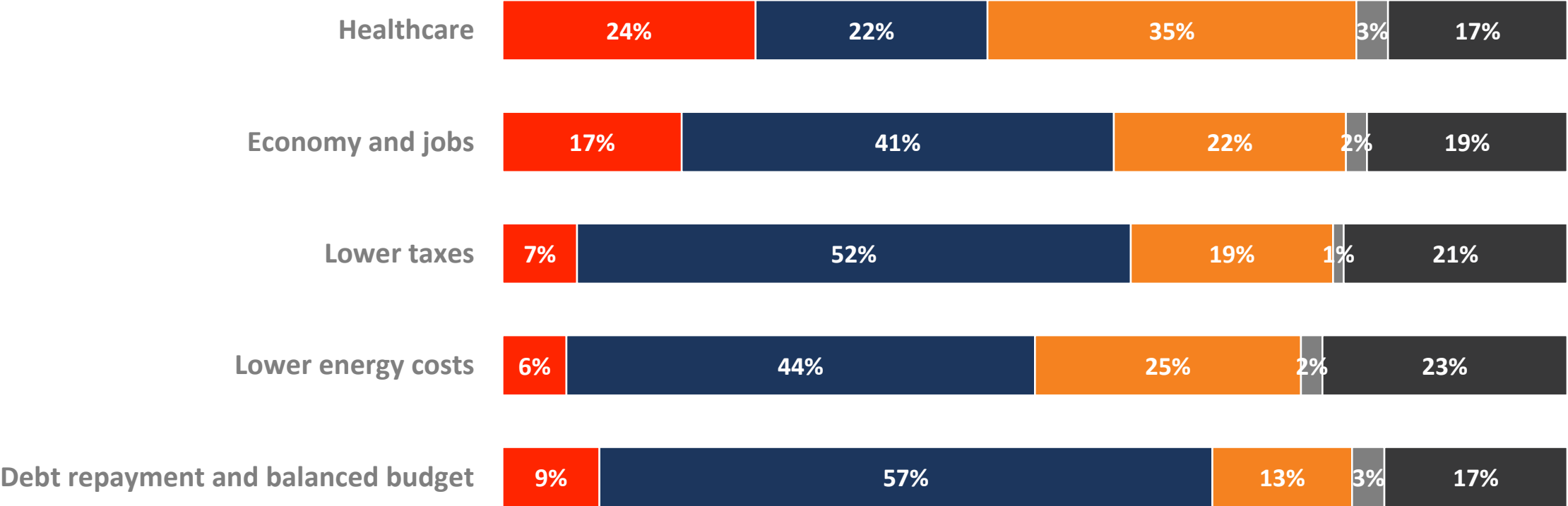
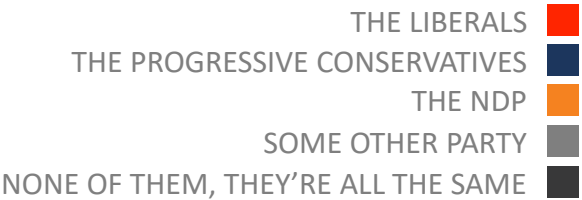
TOP ISSUES FOR ONTARIANS

Healthcare, Economy, Taxes and Energy Dominate



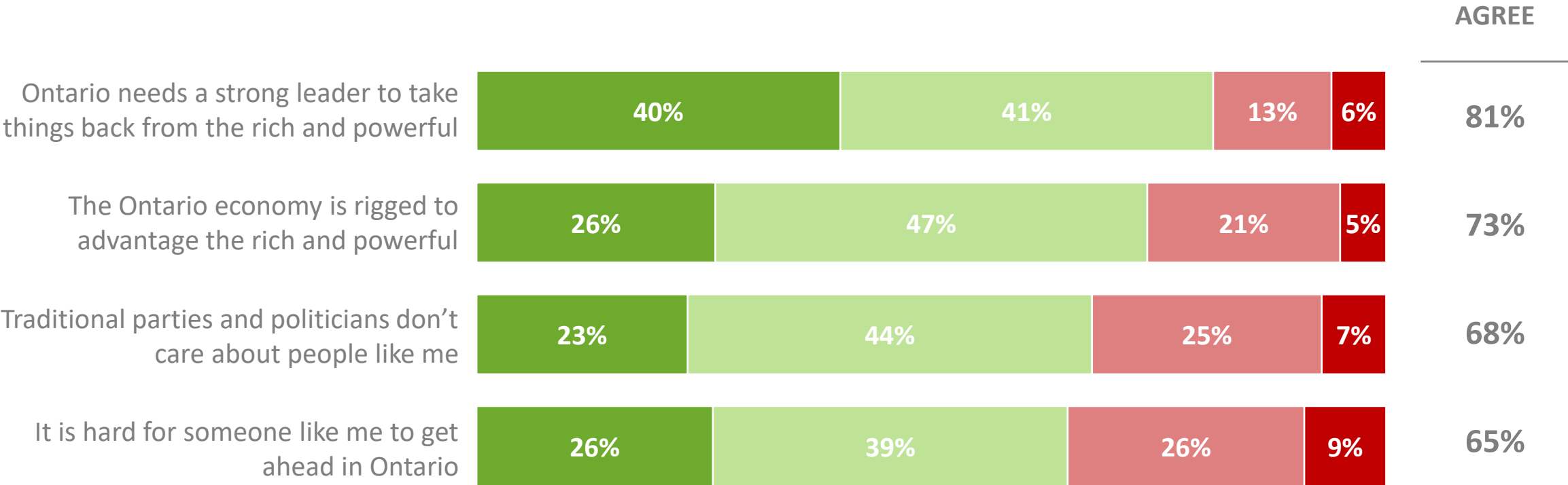
ISSUES BY PARTY

Healthcare Belongs to NDP; PCs Own Others



Frustration, Anger a Key Sentiment in this Election

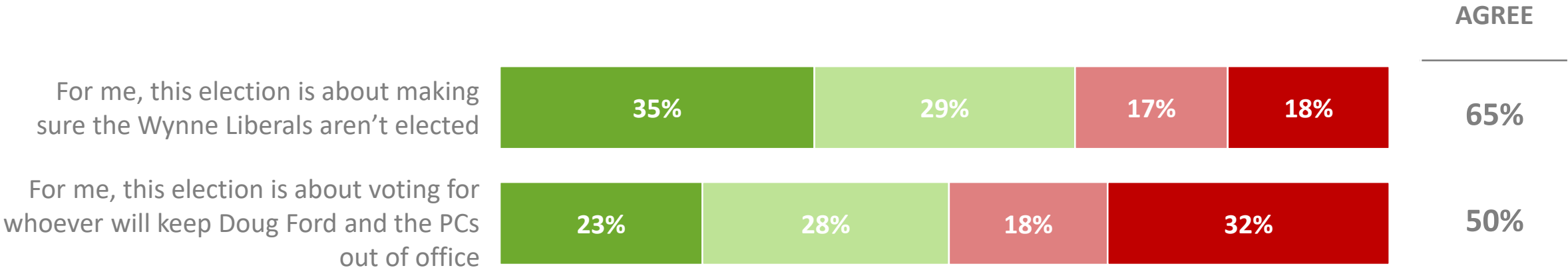
STRONGLY AGREE
SOMEWHAT AGREE
SOMEWHAT DISAGREE
STRONGLY DISAGREE



PERCEPTIONS

Change Vs. Fear

STRONGLY AGREE
SOMEWHAT AGREE
SOMEWHAT DISAGREE
STRONGLY DISAGREE



WHY DOES POLLING SOMETIMES FAIL?

Why does polling sometimes fail?

- 1 Coverage Error – who are we missing in our polling?
- 2 Volatile Differential Turnout – who is going to show up to vote

In short, we need to:

- 1) accurately poll the population of eligible voters to determine vote preference
- 2) estimate how many are going to show up
- 3) estimate who is going to show up

WHY Dealing with Coverage Error

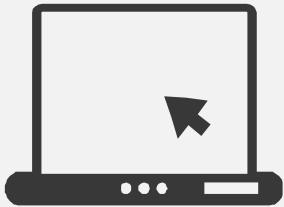


TELEPHONE LANDLINES



CELL PHONES

TRUTH



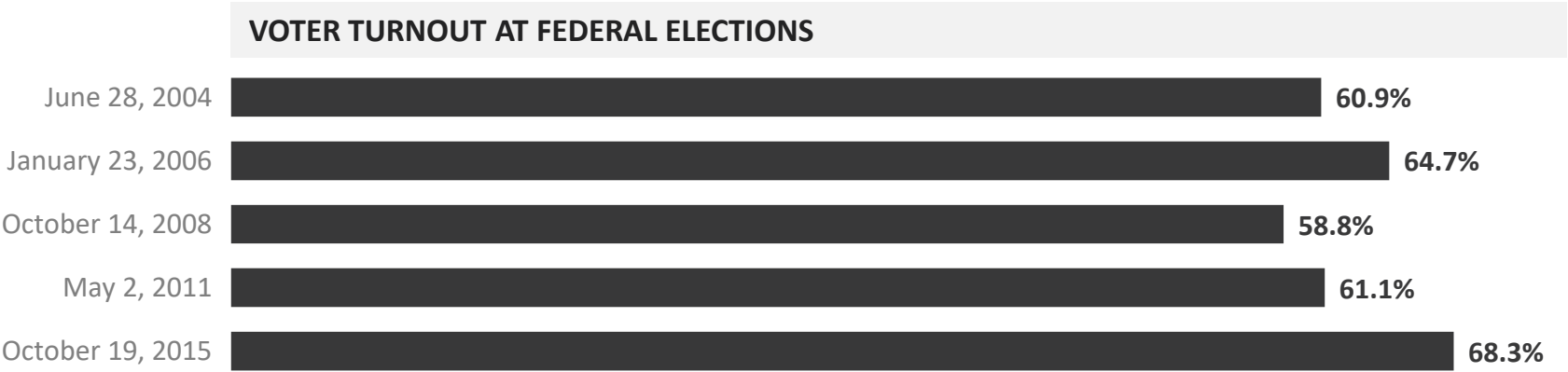
ONLINE NON-PANELS



ONLINE PANELS

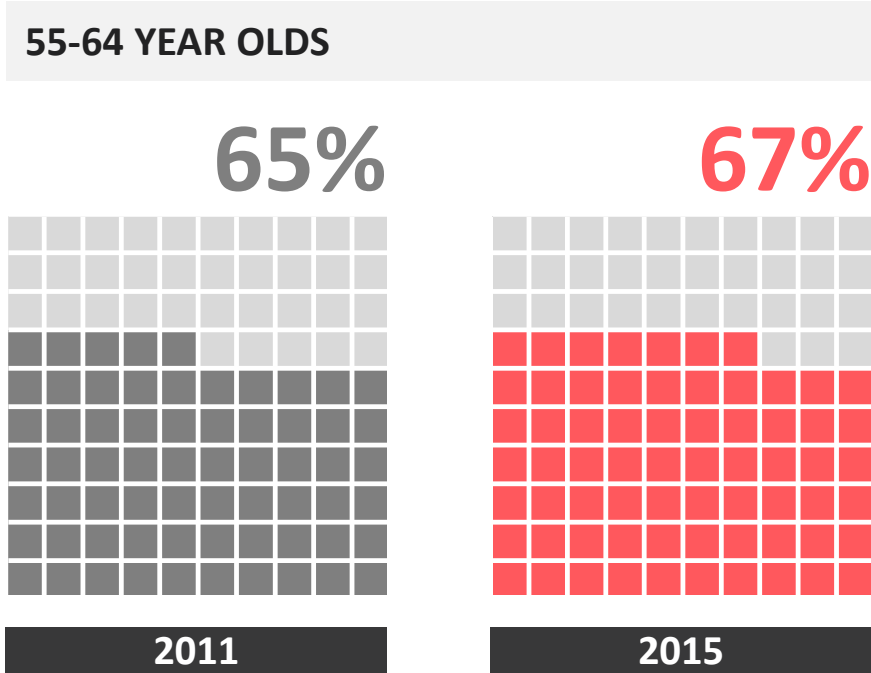
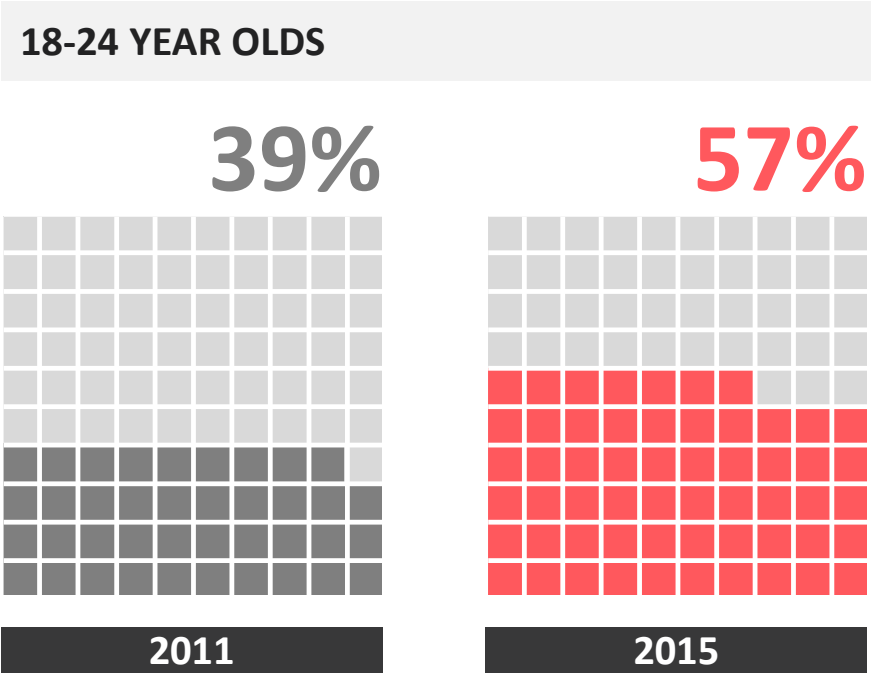
WHY DOES POLLING SOMETIMES FAIL?

Low and Volatile Voter Turnout



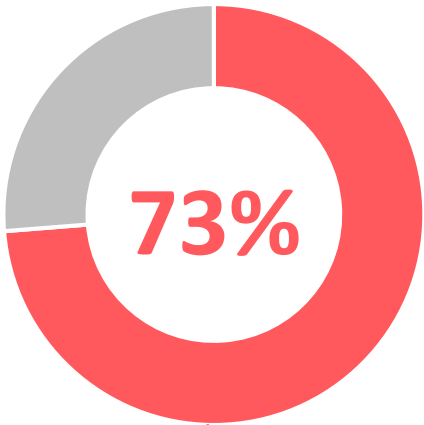
2011 FEDERAL ELECTION TURNOUT VS. 2015

Estimated Turnout in Previous Federal Elections

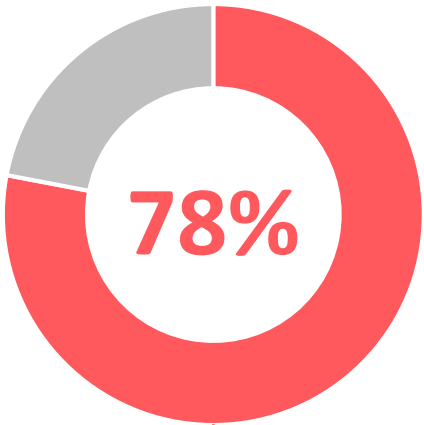


This is really hard to predict.

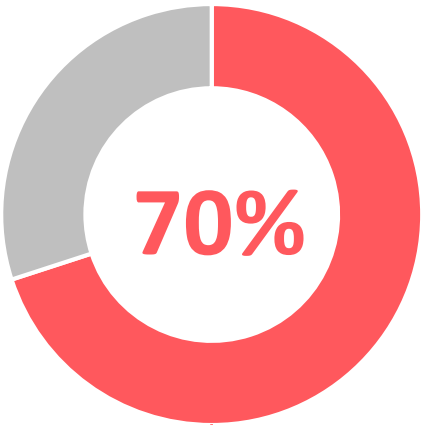
WHY CAN'T WE JUST ASK?
Because...



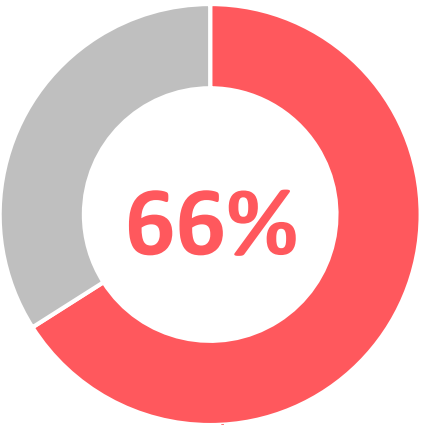
Say they voted in the last Ontario election



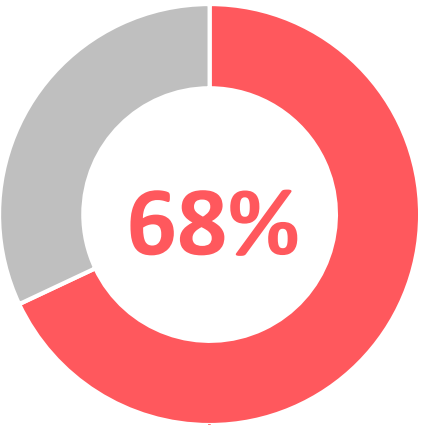
Say they voted in the last Federal election



Say they voted in the 2011 Provincial election



Say they voted in their most recent municipal election



Say that their certainty to vote is at least a 9 on a scale of 1-10

Desirable behavior is over-reported.

SUMMARY

Final Thoughts

- 1 • PCs will win if vote splits on left. All eyes are on Horwath now. Liberals have very little chance of resurrection.
- 2 • Which is stronger: Fear of NDP or Ford?
- 3 • 905 remains most important battleground.
- 4 • Who shows up to vote is key and will determine results of swing ridings.

Contact



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