Public Opinion Research

Ontario Budget 2015
Methodology

- This online survey of 1,017 Ontario adults was conducted from April 24th to April 26th, 2015.
- Each survey is administered to a series of randomly selected samples from the panel sample and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample. After weighting, the final sample size is 1,000.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey and panel members can only complete a particular survey once.
- Since the online survey was not a random probability based sample, a margin of error could not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.

Note: Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.
Provincial Vote
If a PROVINCIAL election were held today, which party would you vote for: [RANDOMIZE AND READ LIST] the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party? AND In that case, which party do you lean toward slightly?
Thinking about politics in ONTARIO, generally speaking, do you usually think of yourself as a...

- PC: 25%
- Liberal: 30%
- NDP: 13%
- Green: 6%
- Other: 2%
- None/Independent: 23%
Reaction to Budget
Have you read, seen or heard anything about the recent Provincial budget that was presented in the Legislature on Thursday, April 23rd?

[asked of all respondents n=1,000]

- Yes: 53%
- No: 38%
- Don't know: 9%

Sample Breakdown

*Those who say “yes”*

**Party ID**
- PC: 61%
- Liberal: 60%
- NDP: 51%
- Green: 46%
- Unaligned: 40%

**Region**
- GTA: 53%
- Non-GTA: 54%
**Satisfaction with Budget**

In general, how satisfied are you with the provincial budget? Would you say that you are very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

[asked of those aware of budget n=532]

- **Satisfied 34%**
  - Very satisfied: 5%
  - Somewhat satisfied: 29%
- **Dissatisfied 60%**
  - Somewhat dissatisfied: 25%
  - Very dissatisfied: 35%
  - Don't know: 6%

**Sample Breakdown**

*Those who say “satisfied”*

**Party ID**

- PC: 21%
- Liberal: 58%
- NDP: 33%
- Green: 21%
- Unaligned: 15%

**Region**

- GTA: 39%
- Non-GTA: 29%
Perceived Impact of Budget
Impact of Budget

Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, a lot less favourable towards the provincial Liberal government?
[asked of those aware of budget n=532]

25% More Favourable

44% Less Favourable

Sample Breakdown

Percentage who say More Favourable

Party ID

PC 18%
Liberal 35%
NDP 23%
Green 6%
Unaligned 21%

Region

GTA 28%
Non-GTA 22%
Impact on Personal Situation

How do you think the new budget will impact your own personal situation?
[asked of those aware of budget n=532]

Positive 12%

Negative 49%

Sample Breakdown

Those who say “negative”

Party ID

- PC: 66%
- Liberal: 33%
- NDP: 44%
- Green: 66%
- Unaligned: 51%

Region

- GTA: 47%
- Non-GTA: 51%
Impact on Economy

Do you think the budget will have a positive or negative impact on the economy?
[asked of those aware of budget n=532]

Positive 26%

Negative 48%

Sample Breakdown
Those who say “positive”

Party ID

- PC: 15%
- Liberal: 38%
- NDP: 37%
- Green: 25%
- Unaligned: 16%

Region

- GTA: 27%
- Non-GTA: 22%
Impact on Taxes

Do you think the budget will result in you paying [ROTATE MORE OR LESS] more taxes, less taxes, or will it make no difference? [asked of those aware of budget n=532]

<table>
<thead>
<tr>
<th>Option</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More taxes</td>
<td>62%</td>
</tr>
<tr>
<td>Less taxes</td>
<td>7%</td>
</tr>
<tr>
<td>No difference</td>
<td>26%</td>
</tr>
<tr>
<td>Don't know</td>
<td>5%</td>
</tr>
</tbody>
</table>

Sample Breakdown

Those who say “more taxes”

- **Party ID**
  - PC: 83%
  - Liberal: 43%
  - NDP: 58%
  - Green: 57%
  - Unaligned: 64%

- **Region**
  - GTA: 61%
  - Non-GTA: 62%
Impact on Unemployment

Do you think the budget will result in higher levels of unemployment, lower levels of unemployment, or will it make no difference?
[asked of those aware of budget n=532]
Impact on Government Service Fees

Do you think the budget will result in you paying [ROTATE MORE OR LESS] more user fees for government services, less user fees for government services, or will it make no difference?
[asked of those aware of budget n=532]

- More user fees: 67%
- Less user fees: 16%
- No difference: 11%
- Don't know: 5%

Sample Breakdown

Those who say “more user fees”

**Party ID**
- PC: 81%
- Liberal: 56%
- NDP: 65%
- Green: 67%
- Unaligned: 68%

**Region**
- GTA: 67%
- Non-GTA: 67%
Do you think the budget will leave your province’s education system [ROTATE BETTER OR WORSE] better off, worse off or will it make no difference? [asked of those aware of budget n=532]

**Sample Breakdown**

*Those who say “worse off”*

**Party ID**
- PC: 48%
- Liberal: 26%
- NDP: 42%
- Green: 63%
- Unaligned: 45%

**Region**
- GTA: 40%
- Non-GTA: 40%
Impact on Health

Q: Do you think the budget will leave your province’s health care system [ROTATE BETTER OR WORSE] better off, worse off or will it make no difference?
[asked of those aware of budget n=532]

Sample Breakdown
Those who say “worse off”

Party ID
- PC: 55%
- Liberal: 35%
- NDP: 54%
- Green: 52%
- Unaligned: 53%

Region
- GTA: 47%
- Non-GTA: 48%
Impact on Environment

Do you think the budget will leave the environment in your province [ROTATE BETTER OR WORSE] better off, worse off or will it make no difference? [asked of those aware of budget n=532]

Sample Breakdown ➤
Those who say “worse off”

**Party ID**

- PC: 34%
- Liberal: 16%
- NDP: 28%
- Green: 39%
- Unaligned: 29%

**Region**

- GTA: 30%
- Non-GTA: 24%

Better off 18%  Worse off 10%  No difference 46%  Don't know 27%
Reaction to Deficit
Deficit Awareness

Have you heard that the provincial government will have a $8.5 billion deficit for 2015-16?
[asked of all respondents n=1,000]
Concern Over Deficit

In fact the provincial government currently has a $8.5 billion deficit and does not expect to balance the budget until 2018. How concerned are you about the deficit? Would you be extremely concerned, very concerned, somewhat concerned, not very concerned or not concerned at all?

[asked of all respondents=1,000]

Concerned 42%

Not Concerned 23%

20% Extremely concerned
21% Very concerned
29% Somewhat concerned
18% Not very concerned
18% Not concerned at all
5% Don't know
6% Don't know

Sample Breakdown

Those who say “concerned”

Party ID

<table>
<thead>
<tr>
<th>Party ID</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PC</td>
<td>66%</td>
</tr>
<tr>
<td>Liberal</td>
<td>30%</td>
</tr>
<tr>
<td>NDP</td>
<td>37%</td>
</tr>
<tr>
<td>Green</td>
<td>44%</td>
</tr>
<tr>
<td>Unaligned</td>
<td>34%</td>
</tr>
</tbody>
</table>

Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTA</td>
<td>41%</td>
</tr>
<tr>
<td>Non-GTA</td>
<td>42%</td>
</tr>
</tbody>
</table>
Budget Specifics
Below is a list of some of the announcements made in the new provincial budget. For each one, I’d like you to indicate whether it leaves you feeling much more likely, somewhat more likely, somewhat less likely, or much less likely to vote Liberal in the next election, or will it not affect your vote?

[asked of all respondents; n=1,000]

<table>
<thead>
<tr>
<th>Announcement</th>
<th>Much more likely</th>
<th>Somewhat more likely</th>
<th>Somewhat less likely</th>
<th>Much less likely</th>
<th>Will not affect vote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investing $130 billion on transit, roads, bridges and other infrastructure over the next 10 years</td>
<td>19%</td>
<td>35%</td>
<td>13%</td>
<td>7%</td>
<td>25%</td>
</tr>
<tr>
<td>An additional $200 million invested in the Jobs and Prosperity Fund to attract more business investments and create jobs</td>
<td>13%</td>
<td>35%</td>
<td>13%</td>
<td>8%</td>
<td>31%</td>
</tr>
<tr>
<td>Eliminating the province’s $8.5 billion deficit by the 2017-18 fiscal year</td>
<td>11%</td>
<td>33%</td>
<td>11%</td>
<td>9%</td>
<td>36%</td>
</tr>
<tr>
<td>The creation of an Ontario Retirement Pension Plan</td>
<td>17%</td>
<td>29%</td>
<td>11%</td>
<td>14%</td>
<td>29%</td>
</tr>
<tr>
<td>The government will raise $100 million a year with a new beer tax that will increase the price of beer by about 25 cents a year for four years on the cost of a case of 24</td>
<td>14%</td>
<td>22%</td>
<td>14%</td>
<td>15%</td>
<td>35%</td>
</tr>
<tr>
<td>No wage increases for public sector workers - including teachers and nurses - until the $8.5 billion deficit has been eliminated</td>
<td>13%</td>
<td>24%</td>
<td>18%</td>
<td>18%</td>
<td>27%</td>
</tr>
<tr>
<td>Selling 60% of Hydro One, with no shareholder allowed to control more than 10% of the company with gov't retaining 40% ownership and remaining single largest shareholder</td>
<td>6%</td>
<td>18%</td>
<td>20%</td>
<td>30%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Note: ‘Don’t know’ not shown

Reaction to Budget Announcements

<table>
<thead>
<tr>
<th>Announcement</th>
<th>Net Favourable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investing $130 billion on transit, roads, bridges and other infrastructure over the next 10 years</td>
<td>+34</td>
</tr>
<tr>
<td>An additional $200 million invested in the Jobs and Prosperity Fund to attract more business investments and create jobs</td>
<td>+26</td>
</tr>
<tr>
<td>Eliminating the province’s $8.5 billion deficit by the 2017-18 fiscal year</td>
<td>+25</td>
</tr>
<tr>
<td>The creation of an Ontario Retirement Pension Plan</td>
<td>+21</td>
</tr>
<tr>
<td>The government will raise $100 million a year with a new beer tax that will increase the price of beer by about 25 cents a year for four years on the cost of a case of 24</td>
<td>+7</td>
</tr>
<tr>
<td>No wage increases for public sector workers - including teachers and nurses - until the $8.5 billion deficit has been eliminated</td>
<td>+2</td>
</tr>
<tr>
<td>Selling 60% of Hydro One, with no shareholder allowed to control more than 10% of the company with gov't retaining 40% ownership and remaining single largest shareholder</td>
<td>-25</td>
</tr>
</tbody>
</table>
Below are some statements that some people have made about new provincial budget. Please indicate if you agree or disagree with each one.

[asked of all respondents; n=1,000]

Selling off government assets is not a good way to raise funds for other projects

- **Strongly agree**: 37%
- **Somewhat agree**: 28%
- **Somewhat disagree**: 16%
- **Strongly disagree**: 7%
- **Don't know**: 13%

The Ontario Retirement Pension Plan is really just a hidden tax

- **Strongly agree**: 24%
- **Somewhat agree**: 25%
- **Somewhat disagree**: 16%
- **Strongly disagree**: 11%
- **Don't know**: 24%

It is not fair to government workers to make them wait until the budget is balanced before they can get any raises at all

- **Strongly agree**: 20%
- **Somewhat agree**: 29%
- **Somewhat disagree**: 18%
- **Strongly disagree**: 21%
- **Don't know**: 12%
Cap-and-Trade System
The provincial budget included an announcement that Ontario will be moving ahead with a cap-and-trade system for greenhouse gas emissions. How familiar are you with the concept of a cap-and-trade system? (asked of all respondents=1,000)

Familiar 47%
Not familiar 53%

You have a detailed understanding of the cap-and-trade system: 37%
You have a general understanding of the cap-and-trade system but don’t know the details: 10%
You have heard of the cap-and-trade system but don’t know much about it: 25%
You haven’t heard of the cap-and-trade system before this survey: 28%

Sample Breakdown:

Party ID
- PC: 54%
- Liberal: 51%
- NDP: 51%
- Green: 51%
- Unaligned: 33%

Region
- GTA: 46%
- Non-GTA: 48%

[Note: Don’t know not shows; n=]
Impression of Cap-and-Trade System

From what you know about it, do you have a favourable or unfavourable impression of the cap-and-trade system?

[asked of all respondents who have heard of cap and trade system; n=716]

Favourable 33%

Unfavourable 34%

Sample Breakdown

Those who say “favourable”

Party ID

PC 22%
Liberal 45%
NDP 37%
Green 38%
Unaligned 24%

Region

GTA 34%
Non-GTA 32%
As you may be aware, cap-and-trade is an approach to controlling greenhouse gas emissions. The “cap” sets limits on emissions, which is lowered over time to reduce the amount of emissions released into the atmosphere. The “trade” creates a market for emissions, which motivates companies to meet or come under their allotted limit – the less they emit, the less they pay, so there is a financial incentive to reduce emissions. Do you support or oppose this general idea?

[asked of all respondents; n=1,000]
Research-based strategic advice.

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