

# ELECTION 2018

## WHAT HAPPENED

## WHAT'S NEXT



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strategic insights

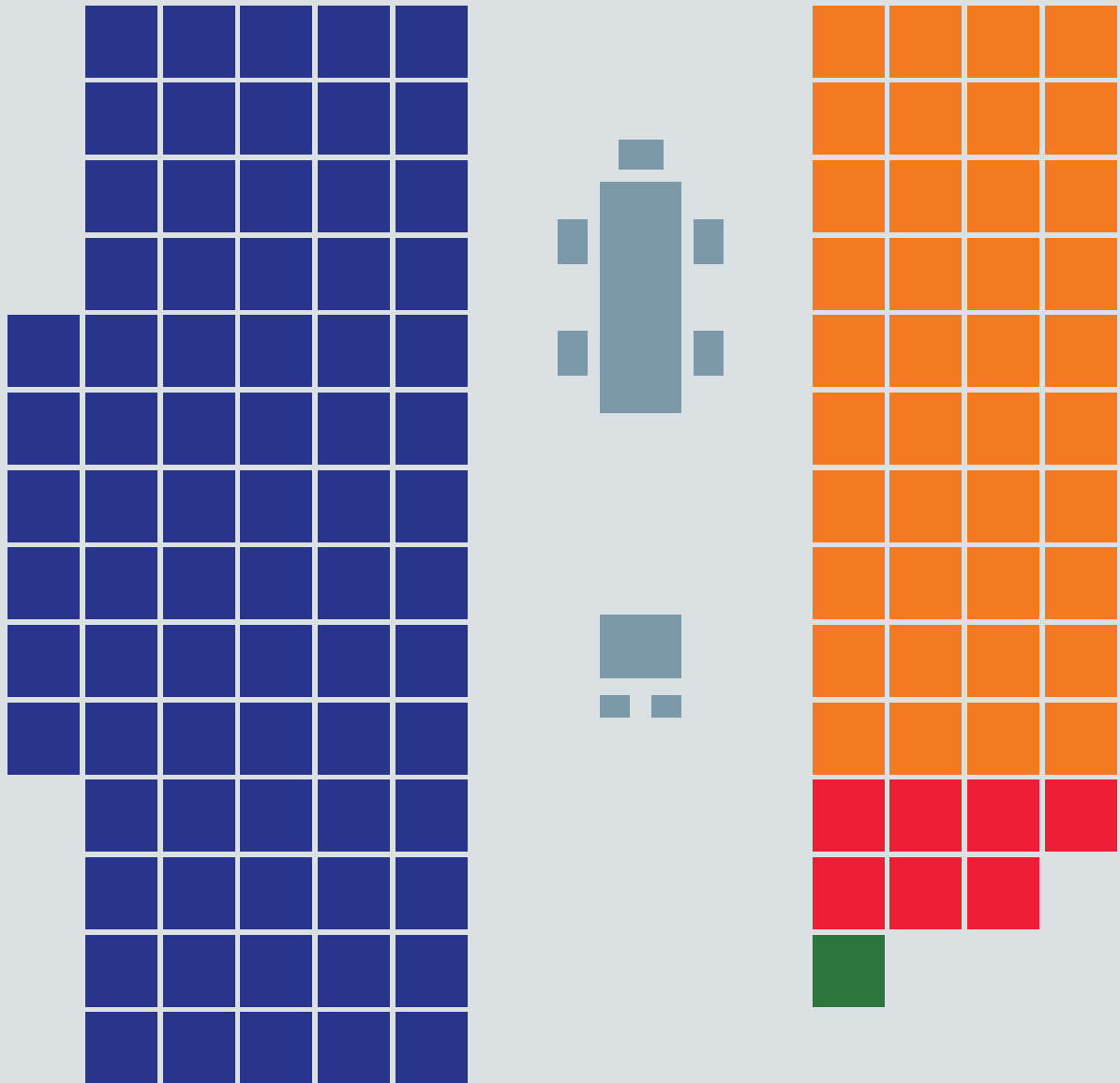
**MACLEAN'S**

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# Welcome to our Look Inside Election 2018

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## Friends, colleagues and partners,

We are going to have a new Premier, a new government and lots of change coming to Ontario. On behalf of Pollara, Enterprise and Maclean's, we are delighted to share with you our post-election research report, *Election 2018: What Happened What's Next*.

The 2018 Ontario Election has been one of the most anticipated and closely followed in recent history. It was an election about change.

The results will undoubtedly change the face of Ontario for the next four years, and Premier–Designate Doug Ford will have a lot of work ahead to roll out the Progressive Conservative platform. We wanted to dig deeper into the key issues that motivated voters, answer some of the questions about what happened and explore what's next for Ontarians.

We examined the political mandate the voters gave the new government, their perceived priorities, their confidence in and concerns about PC leadership and overall desire for change.

Our in-depth research report breaks down the findings of exclusive quantitative post-election research conducted by Pollara Strategic Insights. With a comprehensive analysis from Enterprise, this provides an unmatched, thorough look inside the 2018 Ontario Election and what it means for the future.

We recognize and thank our sponsors Labatt, Bruce Power and CN for their support and for making this important research possible, as well as Maclean's, our media sponsor, for its participation in and coverage of this initiative.

We trust you'll find this report informative and insightful and encourage you to share it with your colleagues.

Thank you for taking the time to read our report.

Sincerely,



**Barbara Fox**  
Chief Executive Officer  
Enterprise



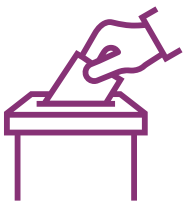
**Don Guy**  
Chief Strategist  
Pollara Strategic  
Insights

# 1. Research Methodology

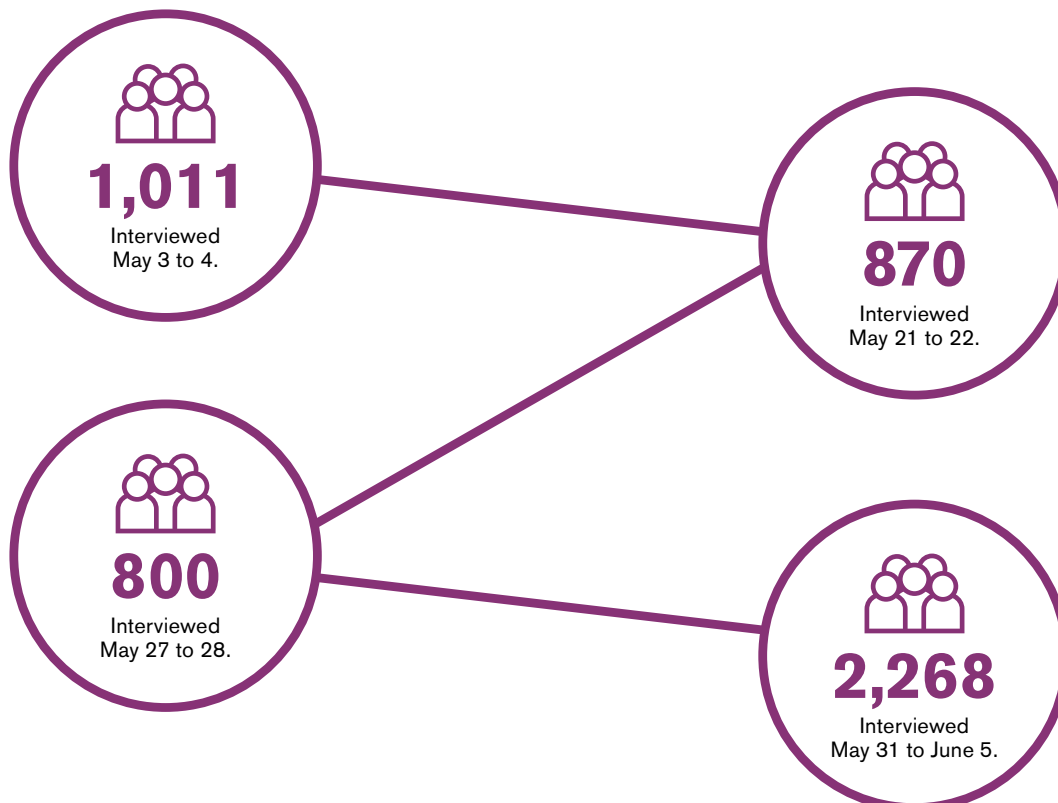
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Pollara Strategic Insights, in partnership with Enterprise and Maclean's, conducted extensive vote intent polling to get insight into the mindset of Ontario voters, find out why they intended to vote the way they did, and what it means for the next government. The polling program included quantitative research throughout the 2018 Ontario Election campaign leading up to election day on June 7, 2018.

## Polling Sample



Following the first 3 online surveys conducted during the May 3-28 period, Pollara conducted nightly vote intent tracking from May 30 to June 5 among approximately n=300 eligible Ontario voters per night. Utilizing a mixed-mode (live-interviewer telephone and online) approach, this survey was reported on a daily basis in Maclean's, based upon a rolling 4-night sample of approximately n=1,200 eligible Ontario voters. The final poll was based on a 3-night sample of n=906, conducted June 3-5.



## Polling Breakdown



**5,827**

Total surveys conducted.



**4,570**

Interviews were conducted via an online survey approach among verified members of a research panel.



**1,257**

Interviews were conducted via a live-interviewer CATI telephone survey approach.



**26%**

Interviews being conducted via cellphone.

## The Survey Behind This Report

Beyond the vote intent tracking, the research findings in this report are based on an online survey of eligible Ontario voters, conducted from 930AM on June 6 until 630AM on June 7, 2018. The results herein are based upon the n=878 decided voters in this survey sample, weighted according to the actual election results (as well as the demographic and regional distribution of the Ontario population) in order to ensure an accurate analysis of the views of the electorate. A probability sample of this size would carry a margin of error of  $\pm 3.3\%$ , 19 times out of 20.

## 2. Ford Drive: High Occupancy in the Express Lane

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### One Nation Under Doug

From almost the moment Doug Ford was elected as Leader of the Ontario PC Party, the electoral math added up to him becoming Premier. Elections are, fundamentally, about building coalitions of voters. Start with the PCs' rural and small-town base, graft it onto the formidable "Ford Nation" in and around Toronto, and mix in other demographics (ethnic communities, social conservatives, blue collar labour), and it all equalled a winning coalition.

### A Simple Plan

Central to the success of the PC campaign was Ford's ability to stay on message – both in style and content.

In many ways, he was the ideal candidate for the circumstances: Simple messages to cut through the exponential clutter of social media; an existing brand to build from, which was critical in the short time-frame he had – less than 60 days from winning the leadership; a mixture of anger and hope that fit perfectly into the provincial zeitgeist; and, perhaps most vitally, the resolve to not get suckered into issues that didn't resonate with his band of supporters. (Case in point was Ford's early mis-step around the Greenbelt. In what his opponents were sure was a 'gotcha!' moment, video surfaced of him telling a group of developers he was open to shrinking the

protected zone around Toronto's suburbs. Before any backlash could gain traction, Ford shut it all down with a definitive, "The people have spoken. We won't touch the Greenbelt." End of story.)

Ford also studiously avoided the kind of pitfalls that had torpedoed his predecessors. He didn't pick fights with unions. He repeatedly promised that he would not fire civil servants. Early in the campaign he confirmed his promise to revisit the controversial sex-ed curriculum, then never mentioned it again. Private school funding? Chain gangs? Nope.

### You Can't Spell Affordability Without F-O-R-D

What Ford did talk about, relentlessly and convincingly, was affordability. More than any other issue, this was what voters – or at least those who would consider voting PC – cared about.

Ford's fundamental message was that a PC government under his watch would make life more affordable for Ontarians. Promises to reduce hydro rates, cut gasoline prices, lower taxes (again, scoffed at by his opponents, music to the ears of the growing Ford Nation) all reinforced the notion that he – and only he – would put money back in people's pockets.

Sticking to this message track had the added benefit of creating unmissable differentiation between Ford and his

rivals. Almost every NDP and Liberal promise came with a hefty price tag. Yes, so did some of Ford's, but his were buttressed by the perceptions of frugality that were the bedrock of his campaign.

## **Sound Bites, Not Buffets**

Ford's campaign roll-out was similarly disciplined. His team recognized that the traditional model – the daily raft of announcements, piling promises on promises to a contingent of jaded journalists – had gone the way of the telex.

Ford's team eschewed what political veterans call the “Gainsburger” approach – feeding tidbits to a hungry media, which would follow begging for more. Instead, it limited media access – which naturally triggered some caterwauling from the scribes, but still left them with no choice but to cover what was there. And what was there was a repeated message about affordability.

NDP Leader Andrea Horwath, by contrast, often made 3-4, usually unrelated, announcements on any given day. Gainsburgers aplenty, but our research suggests this worked against her, particularly in competing with the relative simplicity of what Ford was doing. Few of Horwath's promises penetrated deep into undecided voters' consciousness, while she moved on to something else without having moved the needle.

## **Pivotal Moments**

While Ford himself stayed on a straight track, the campaign around him did make some critical shifts.

In almost every election campaign, unexpected events challenge the planned strategy. In Ford's case, it was the sudden

surge of NDP credibility, which, had the Ford team not adjusted, might have significantly changed the outcome.

This adjustment included two notable (and related) pivots:

### **Pivot #1**

Much of the early PC campaign contrasted Ford's plan with the Liberals under Kathleen Wynne. Fairly quickly, however, Horwath's NDP emerged as the more imposing threat. More so than in any election since 1990, the NDP gained momentum and Horwath could legitimately present herself as premier-in-waiting. Ford's team didn't wait for such an image to take hold – it swiftly pivoted to Horwath as enemy number one.

Starting with the major televised debate and following up with targeted advertising and war-room tactics, the Tories launched relentless lines of attack decrying the NDP record from governing in the 1990s, the personal pocketbook costs of Horwath's promises and a slate of wacky NDP candidates.

### **Pivot #2**

Although the PC campaign focused primarily on Ford himself, it did feature a strategic decision to shine some of the spotlight on other candidates, showcasing potential cabinet ministers by having the likes of Christine Elliott and Caroline Mulroney at events and photo ops. Not coincidentally, they are accomplished women. By sharing the stage with them, Ford was able to a) blunt negative perceptions of himself as a bombastic lone wolf; and b) show/remind female voters that there were good, competent women around him.



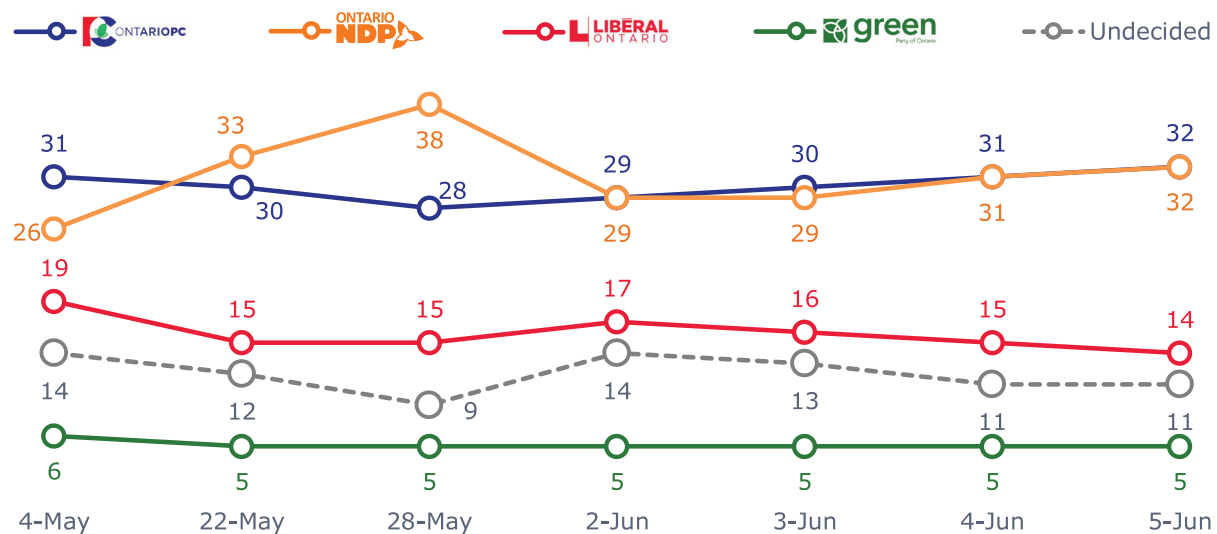
This pivot was a calculated move away from a ‘presidentialized’ race – i.e., leader vs. leader – and positioned Ford as running more of a ‘team’ campaign than the others. (Who would have bet on that at the beginning? Further, given how so much data pointed to Wynne’s popularity badly trailing that of her party, it is astonishing that the Liberals didn’t use more of a team approach. Wynne was prominently featured in nearly every ad and announcement.)

This adjustment also dovetailed with the other pivot, attacking the NDP – it contrasted the reasonable competency of Ford’s would-be caucus with the radical protestors running for the NDP. In retrospect, Horwath’s decision not to address the team questions the Tories were relentlessly pushing has to be seen as a critical tactical error.

The pivoting, our research shows, worked, stalling Horwath’s forward progress enough to keep her in second place.

Had the Tories ignored the NDP surge, Horwath may have been able to grow her own voter coalition. When she plateaued, the PCs were able to take advantage of their own key strengths: far more enthusiastic voters, regional support in the 905 and 416, and support among the demographic most likely to vote – seniors – to put them over the top in a notable way on Election Day. (Voter turnout, it should be noted, was 58% – a 19% increase over 2014 and a high not seen since 1999. An energized base eager for change and excited about Ford certainly contributed to that jump in participation.)

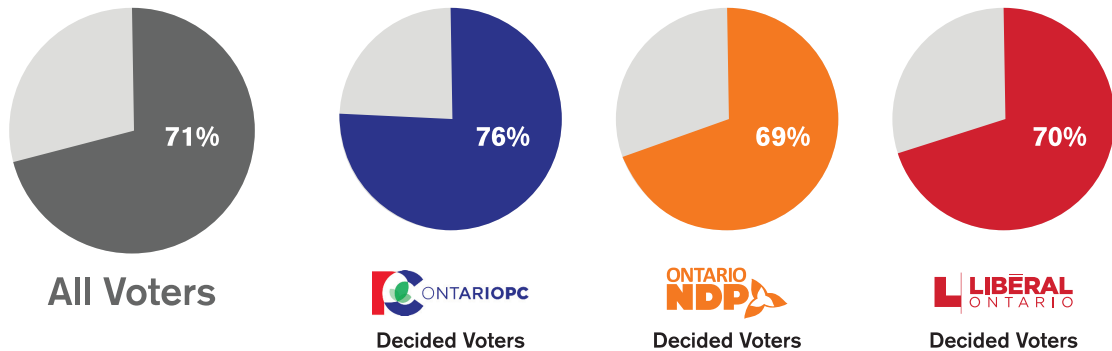
## Initial Vote Tracking (Decideds & Undecideds)



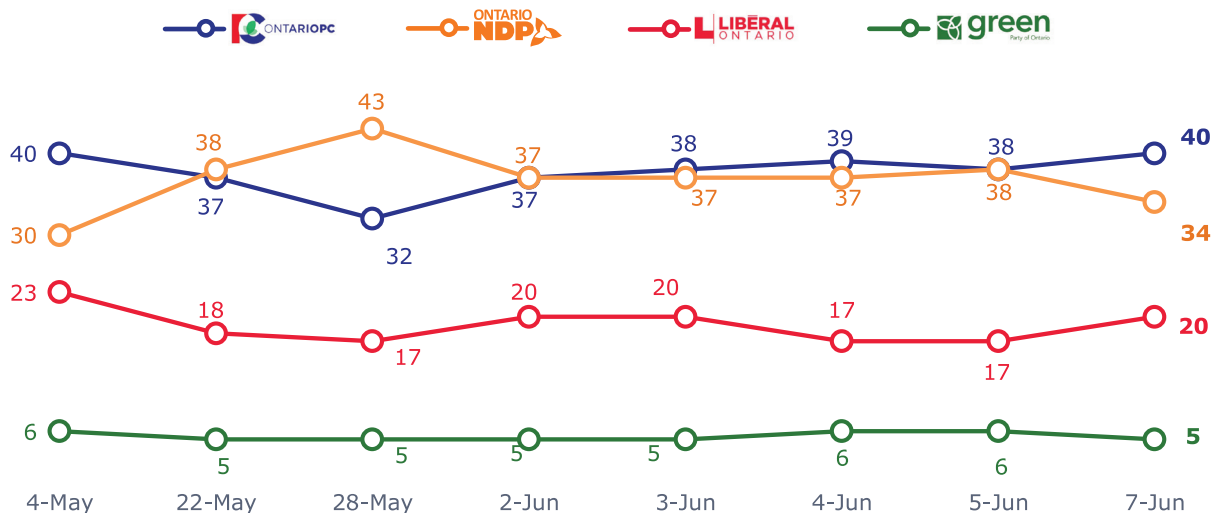


## Certainty to Turnout

### % saying “Definitely Will Vote” in Election



## Decided Voter Tracking



## In the Loop

Another stroke of genius, as it turns out, was “Ford News” – TV journalism that looked and sounded like the real thing, but was in fact a pipeline for PC messaging, putting a high gloss on highlights of Ford’s daily events and announcements.

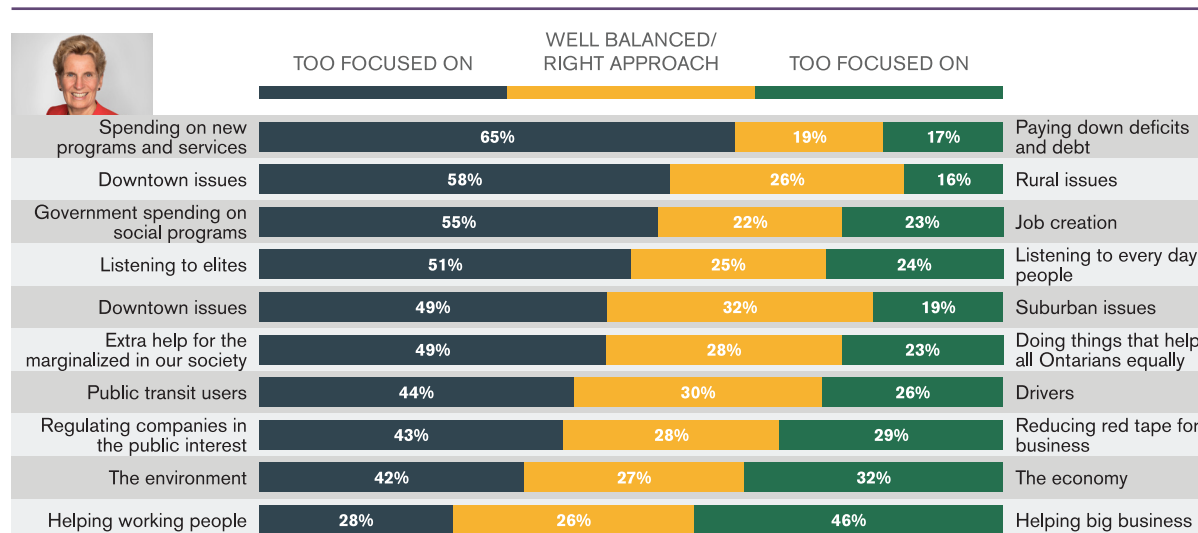
Again, this closed network was never intended for a general audience; rather, it

was designed to bolster the voter coalition Ford was building, nurturing the images and messages – and motivators – Ford had seeded. It was tailored content, designed to by-pass mainstream media and get directly to friendly voters – a distinct difference from the other parties, who didn’t put nearly as much focus on content production and relied on conventional media channels.

## Left, Right, Wrong

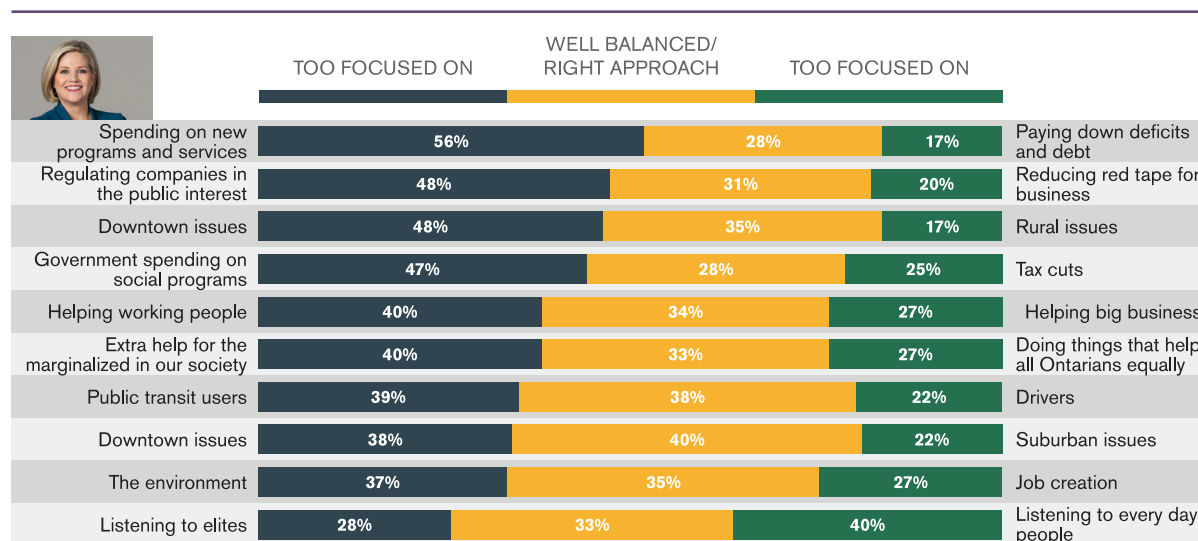
Regardless of the delivery mechanisms, the substance of each party's policy ideas – or more to the point, perceptions of those planks – clearly factored into voters' decisions.

### Perceptions of Wynne's Positioning on Issues



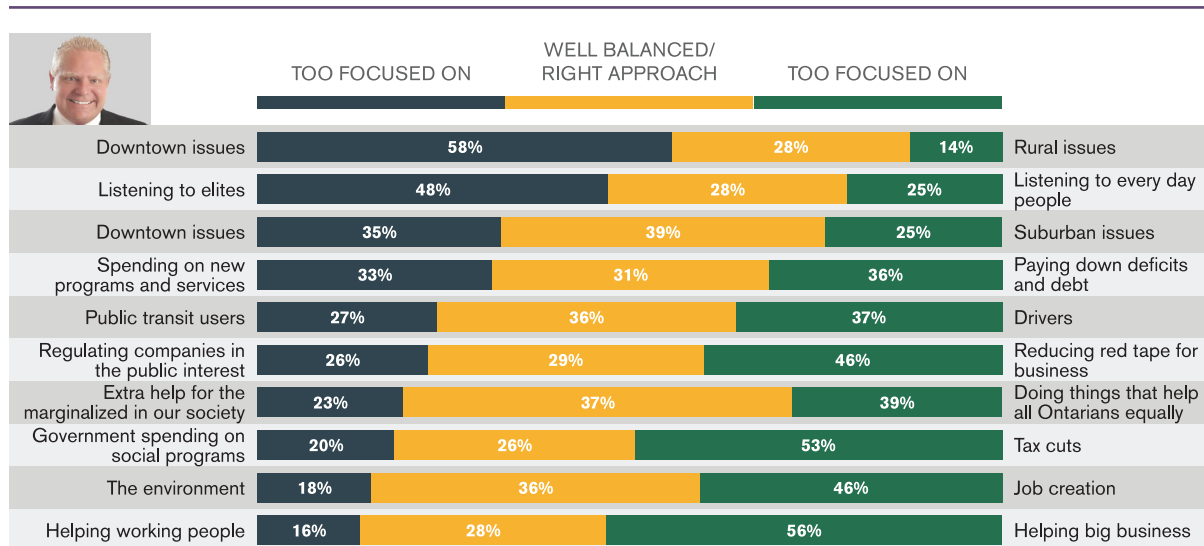
Ford, obviously, was seen as being to the right of the political spectrum, although perhaps less vociferously so than his opponents would have liked. His willingness to accept budget deficits in the short term, his distaste for civil service bloodshed, his avoidance of social justice thorns like welfare reform – these were hardly the postures of a radical right-winger.

### Perceptions of Horwath's Positioning on Issues



On the other side of the spectrum, Wynne's Liberals tracked deliberately and decidedly left. Horwath's NDP went even further left, promising more spending than the Liberals and espousing a vehement anti-privatization stance – underscored by the centrepiece plank of buying back private shares of Hydro One. Voters uneasy with Ford started to coalesce behind her.

## Perceptions of Ford's Positioning on Issues



But even though Horwath emerged as the preferred choice against Ford, she was never able to overtake the Tories, at best pulling into a tie then fading back. Her relatively low profile in the months before the election, combined with the legacy of her trying to flank Wynne on the right in the 2014 election, may have undermined her appeal. This was compounded by her principled, though flat-footed response on the York University strike – basically vowing to never impose back-to-work legislation under any circumstances – along with her apparent support of untenable positions taken by her candidates (in contrast to Ford jettisoning Tanya Granic Allen within hours of her extreme views being exposed). Add in the resonance of the Ford attacks on the previous NDP government's record in the 1990s, and the result was an erosion of

Horwath's momentum, the enthusiasm of her potential supporters and ultimately her vote on Election Day.

## A Change – Your Mind – Election

Winning 76 seats and amassing more than 40% of the popular vote certainly leaves the impression that Election 2018 was a triumphant march for Ford sweeping across the province. In many ways that's true, but the election wasn't without its moments of doubt.

Our polling research shows that Ford started the election campaign with enough popularity for a majority government and that's exactly what he got. However, there was some volatility along the way.

Many voters intending to vote PC at the start didn't budge at any point in the

campaign. But those less committed – knowing they wanted a change in government, but not sure which way to go – wavered between their options. With the Liberals largely out of the picture, the choice between Ford's PCs and Horwath's NDP was evidently not an easy one, and many voters changed their minds – multiple times – before finally casting their ballots. More of them, in the end, chose Ford.

We say chose Ford – as opposed to the PC Party or individual local candidates – because this election was very much about the party leaders. Perhaps more so than any previous campaign, personality took precedence over policy. Likeability and trustworthiness, rather than specific platform promises, were the deciding factors for many voters.

Our tracking shows that when Ford and Horwath were mainstreeting – interacting and engaging directly with voters and,

importantly, appearing to *enjoy* doing so – their support increased. Far more so than staged announcements at podiums, or even rallies with cheering supporters.

While the conclusion may have been in doubt at times, it now seems inevitable that this was going to be a **CHANGE** election. As recently as five months ago, some polls showed the Liberals gaining strength. But their support ultimately evaporated and they ended up with the worst share of popular vote in the party's history – more than 80% of voters opting for someone else. The Liberal campaign never did figure out how to communicate in a way that would attract voters to them, as opposed to ping-ponging voters back and forth between the PCs and the NDP while also alienating some of their last remaining supporters.

This election became, simply, a two-horse race. Some voters hedged their bets, then most of them bet on Ford.

## Desire for Major Change Among Non-Liberal Voters

Desire for Major Change Among Non-Liberal Voters Across Policy Areas			Decided Vote	
			PC	NDP
Overall direction of the government	70%		82%	58%
Honesty and integrity	81%		88%	71%
Getting value for taxpayer's money	74%		82%	64%
Electricity prices	73%		78%	69%
Affordability	71%		73%	70%
Deficits and debts	67%		81%	52%
Health care	61%		62%	62%
Getting tougher with federal gov'n't to get Ontario's fair share	58%		63%	54%
Taxes	56%		68%	40%
Jobs and economy	56%		63%	48%
Housing	52%		48%	55%
Environment & climate change	46%		41%	48%

## Realign in the Sand

Aside from the obvious change in government, Election '18 brought about a drastic shift in Ontario's political landscape.

Historically, apart from a few short blips, for more than 70 years the Liberals and PCs have either been Government or Official Opposition. The last time the Liberals finished in third place was 1975, and even then they only had two fewer seats than the NDP. You have to go back to the Second World War, 1943 to be exact, for the last time they were a distant Third Party, as they find themselves today.

As of now, the New Democrats are firmly ensconced as Ontario's progressive option. Horwath was able to build momentum and take her party to heights it hasn't seen since 1990, just not high enough to win. Although at times her NDP was in a statistical tie with Ford's Tories in popular support, she could never get over that hump into first place, and riding breakdowns clearly favoured Ford, whose support was concentrated in more vote-rich areas like the GTA.

What Horwath did do, though, is bury the Liberals.

In short, this was a realignment the likes of which hasn't been seen in many generations, and is certainly new to pretty much everyone connected with Queen's Park right now.

Whether this is a permanent shift remains to be seen. Liberal optimists will point no further than Ottawa, where the federal NDP gained unprecedented Official Opposition status in 2011, only to be relegated back to third place four years later. But the Ontario Liberals don't appear

to have a supernova like Justin Trudeau lurking in the wings to lead them back to glory.

In the bigger context, polarization is also a looming presence in Ontario's new political arena.

There will be no shortage of analysis as to why Wynne's Liberals fared so badly, but one commonly held explanation is that they had abandoned the political centre, preferring to try and outflank the NDP on the left of the ideological spectrum.

Ironically, Wynne began the campaign by telling voters they had a "stark" choice to make. She couldn't have known how prophetic that would be, with the demise of the erstwhile centrist Liberals creating a purer left/right divide. Whether the Tories and/or NDP look to fill that middle void, or if the Liberals can somehow reclaim it, will define Ontario's political future.

## And Now For Something Completely Different

Once the euphoria of the majority victory wears off, Ford and his team will face the task of determining and implementing priorities. With such a large majority, they essentially have carte blanche. But they know their early moves will set a tone, and many of those immediate decisions will be based on their grasp of the dynamics that propelled them into power.

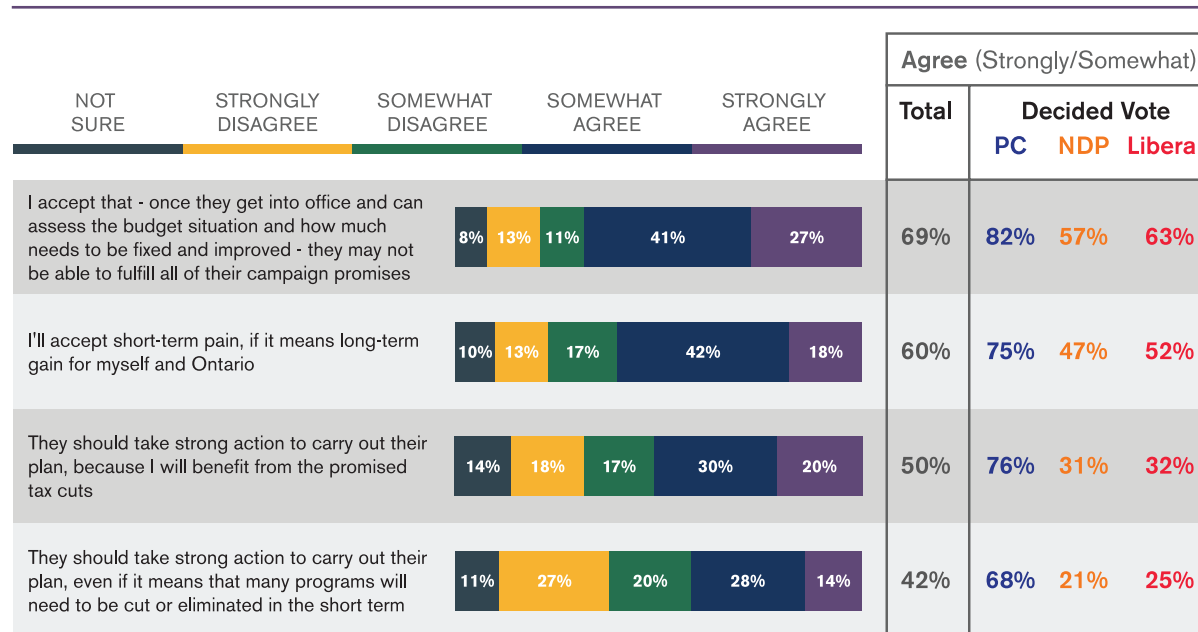
Fortunately for the new government, there is some room to manoeuvre thanks to widespread expectation (among both PC and non-PC supporters) that it may be impossible to fulfill all campaign promises due to unknown budget issues. As such, his first move will undoubtedly be to kick off the promised independent audit, which will provide some leeway on platform

expectations. Additionally, our research indicates that most Ontarians, including about half of NDP and Liberal voters, are willing to accept some short-term pain for long-term gain. So, Ford has a bit of elbow room as he lines up his policy priorities.

As he determines what to do and when, Ford's team would be wise to recognize that not all policies are equal. There

appears to be one significant limit on Ford's political license: service cuts. Only PC voters – less than half of the electorate – appear willing to accept program reductions as part of the Ford agenda. Treading into this territory poses a risk of galvanizing anti-Ford sentiment, setting up the kind of unrest that characterized – and hindered – the Mike Harris government of the late 1990s.

## Attitudes About Doug Ford PC Government



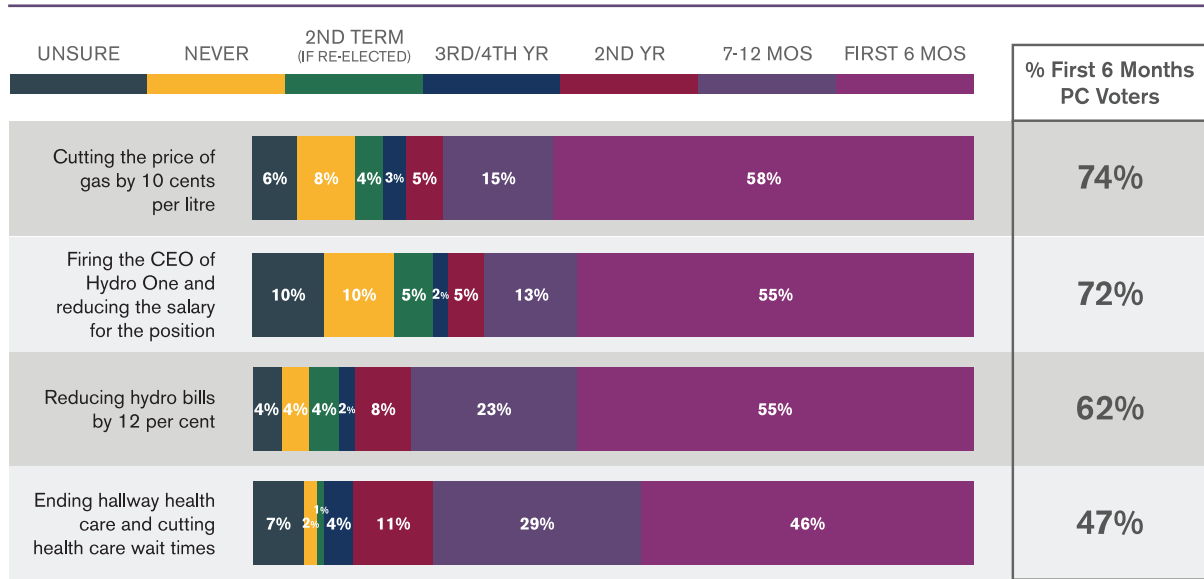
In terms of the most urgent priorities, action related to affordability would seem to be the best place to start – in keeping with what this election was about for many voters in the PC coalition and beyond. Specifically, at least half want to see immediate action on the gas discount, reducing hydro bills, slashing Hydro One executive salaries (including firing the CEO), and taking steps to address “hallway health care” within the first six months of the Ford administration.

## Keep 'Em Coming

As emphatic as Ford's victory was, there is still plenty of opportunity for him to build an even bigger PC tent.

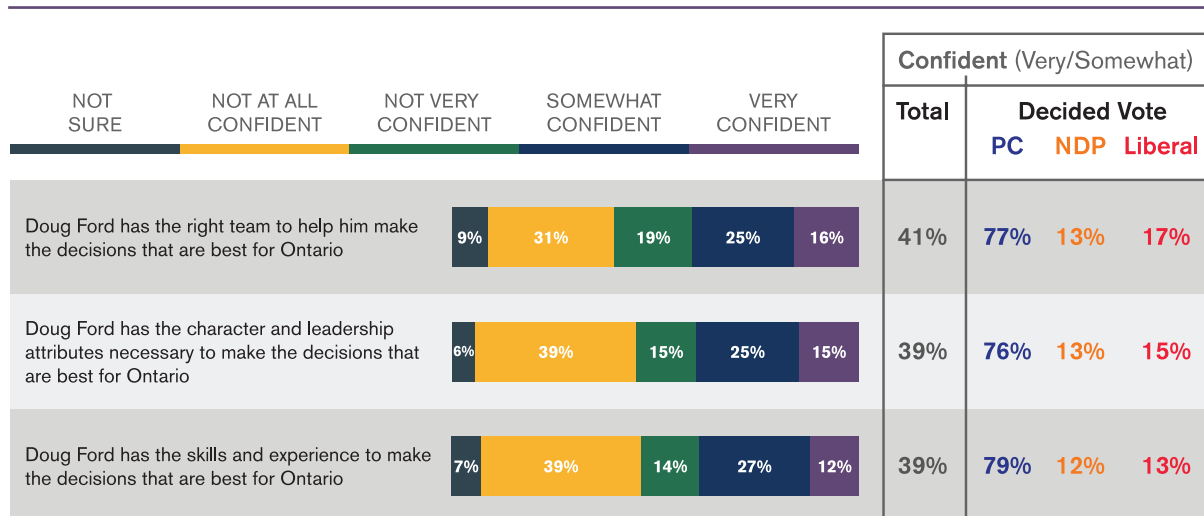
Fully three – quarters of PC voters are confident that Ford has the leadership attributes and team to do what is best for Ontario. Fewer than two-in-ten non-PC voters feel the same, but presumably some of them could be won over.

## Ford Campaign Promises: Support & Urgency



Not unlike Prime Minister Jean Chretien federally, despite his successes Ford has been consistently underestimated by pundits. This sets the stage for him to potentially grow his support base by – yet again – exceeding expectations in terms of achieving policy successes as well as taking action attractive to voters beyond the current PC tent.

## Confidence in Doug Ford's Leadership





## Key Campaign Moments On Social



**April 19**  
Doug Ford “Millionaires Club”



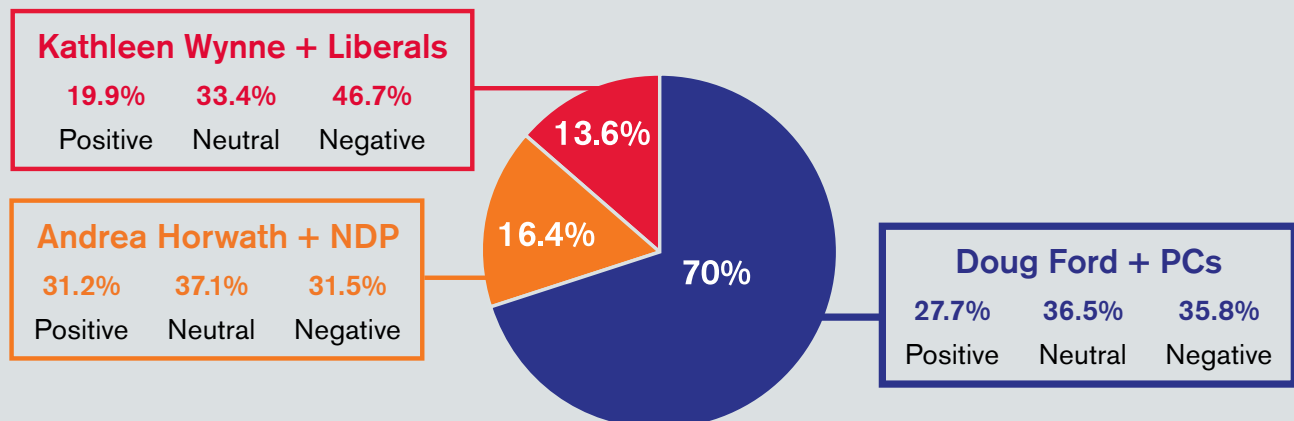
**May 4**  
Andrea Horwath “Dodgeball”



**May 26**  
Doug Ford “Dollar Beer”

## Share of Voice + Tone

We looked at how frequently each party and party leader was mentioned on social platforms including Twitter, Facebook, Instagram and Reddit between April 1 and June 9 to determine who owned the social conversation and what the tone of those conversations was.



## Digital Innovations

Hashtags drive campaigns. All three parties – and Elections Ontario – leveraged hashtags throughout the campaign.

#FordNation



#Change4Better



#SorryNotSorry



#onpoli #ONEIxn  
#OntarioVotes

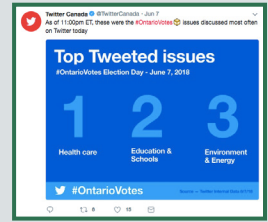




**May 27**  
Day of the Final Leaders Debate



**June 2**  
Wynne Concedes



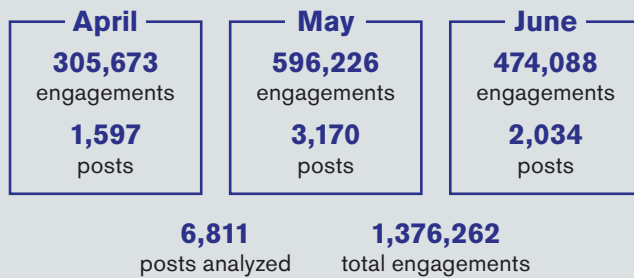
**June 7**  
Election Day

## Whose Content Got Traction

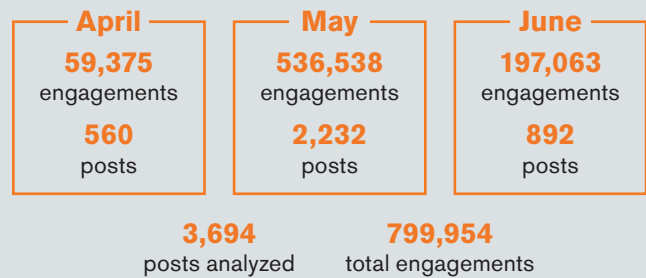
We looked at the volume of Facebook posts mentioning each party and party leader on public Facebook pages (including official party pages, official pages for individual leaders and news outlets) and how much engagement those posts generated to determine which party received the most traction.

## Facebook Engagement

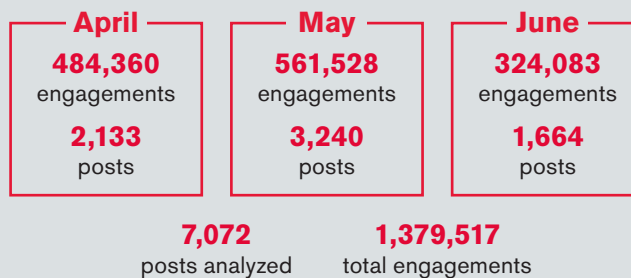
### Doug Ford + Ontario PCs



### Andrea Horwath + Ontario NDP



### Kathleen Wynne + Ontario Liberals



## WHAT'S NEXT FOR ONTARIO PROUD?



Third-party groups activating voters through digital. Groups like Ontario Proud played a key role in influencing and engaging voters on social media throughout the campaign.

## Ford Nation Live



Ford announces no media bus in April, uses FordNationLive.ca to produce news-style content that's leveraged on social channels to cover campaign trail, push key election messages and advocate the PC platform.

### FordNationLive Videos Posted on Facebook from April 1-June 9 (Party + FordNation Pages)

**165**

videos posted

**9,637,074**

total views

**58,407**

average views  
per video

### Top Performing FordNationLive Videos on Facebook

**1.2M** views

Ford calls out Hydro One  
"Millionaires Club" + \$50  
million bombshell re: Hydro  
One Executive Pay

**1.1M** views

Learn more about Kathleen  
Wynne's place in the  
Guinness Book of Records

**751,000** views

Plan to cut hydro bills

### FordNationLive.ca – Top Link Shares on Social

**10.3K**

Doug Ford will Cut Gas Taxes  
by Ten Cents Per Litre

**9.8K**

Doug Ford Calls on the  
Millionaires Club Running  
Hydro One to Resign

**1.8K**

Doug Will Cut Wait Times For  
the People

# ENTERPRISE

## Look Inside

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“

**This election – despite all the breathless anticipation – was the same as most. Get the big questions right and reap the rewards. Get the big questions wrong, and the people will let you know. Welcome to FordNation!**

”

Jason Lietaer  
President, Enterprise