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WHAT'S YOUR CHALLENGE? ?

Federal Election Study - Ontario
Advanced Analytics
Federal and Provincial Ballot Tests
March 26th, 2025

CAIP PAIM Certified Agréé

CONTENTS

METHODOLOGY

Methodology - Pg1

Quantitative Market Research – Ontario

This study was conducted from March 24th to 26th 2025, among a sample of 1,902 respondents who were eligible voters in Ontario and are members of Maru/Blue's online panel.

For comparison purposes, a probability sample of a similar size would have a margin of error of +/- 2.2%, 19 times out of 20.

Discrepancies in or between totals are due to rounding.

Where & How is the Study Conducted?

The study included respondents from an online panel of eligible voters in Ontario, 18 years of age and older. The sample is weighted to regional, age and gender demographics, as per Statistics Canada.

Stats Testing

Significantly higher than the Ontario average

Significantly lower than the Ontario average

Advanced Analytics

Slides 5 and 6 provide a detailed explanation of the specific analyses conducted for this presentation.

Drivers Analysis and Derived Importance Slide 10

Derived importance (i.e. drivers) analysis uses statistical modelling to estimate relative importance across a set of attributes (i.e. driver variables) by connecting the attribute ratings with an outcome of interest. The output from a drivers analysis helps clients focus limited resources in areas most likely to have a positive impact on an outcome of interest.

The basic problem in drivers analysis is to quantify the impact of each driver on the outcome. A statistically intuitive and well-defined way to do this is to derive the portion of explained variance (i.e. model R-squared) attributable to each driver attribute. Techniques like Johnson's Relative Importance, Shapley Regression, and LMG all do this via computationally intensive approaches to regression.

The derived relative importance scores resulting from a drivers analysis are naturally expressed in terms of "shares of importance" that sum to 100% and represent the relative importance of each driver. As such, the shares permit direct comparisons across the drivers within the analysis, such that a driver with a score of 10% can be described as "twice as important" as a driver with a score of 5%.

Relative Leadership Strength (RLS) Scores Slide 13

Relative scoring techniques use chi-square analysis to examine association or performance relative to expectations across a set of attributes and entities. The output from RLS scoring helps researchers and clients understand relative performance along with absolute performance across leadership characteristics and leaders. Relative scores are also highly useful as an interpretive aid when reviewing spatial maps obtained via Correspondence Analysis (CA), because the two analyses have close connections based on the chi-square statistic.

Absolute performance scores only tell part of the story of leadership performance. For example, a strong leader may be seen as dominant across all performance dimensions, thus leading to a “big brand effect” where the winner-takes-all comparing against scores of other leaders. By taking into account expected leader performance across all performance dimensions, and expected performance across all leaders, RLS reveals areas of significant relative strength (or weakness) across the dimensions of performance.

Statistically, RLS scores function as a set of context-specific Z-scores that are useful for evaluating relative leader performance. Interpreted as Z-scores, the RLS values can be easily stat-tested, colour-coded, or conditionally formatted to provide a quick visual assessment of relative performance across leaders and attributes. In general, RLS scores tend to dovetail very nicely with the major features shown on a CA map. The two analyses have close connections based on the chi-square statistic. In many cases, RLS scores will highlight features that aren't obvious (or even apparent) when looking at a CA map in isolation.

KEY HIGHLIGHTS

Key Highlights

Slide 10 – ranks “covert/derived” importance of each attribute. On Slide 10 you can see the questions asked of respondents about each attribute.

Slide 11 – measures the “overall” rating of each Leader (for prime minister) after respondents had an opportunity to consider the level of importance of each policy plank and/or leadership attribute and to rate the performance of each Leader on attribute.

Slide 12 – combines the “overt/stated” importance of each attribute with the “covert/derived” importance of each attribute. This analysis helps us to better understand which policy planks and/or leadership attributes are currently most important for voters.

Slide 13 – the “Relative Leader Strength Analysis” clearly shows Mark Carney dominating in relative performance (perceived by voters) on what voters are clearly stating and advanced analytics is clearly showing (Slide 6 for explanation) to be the most important issues in this election.

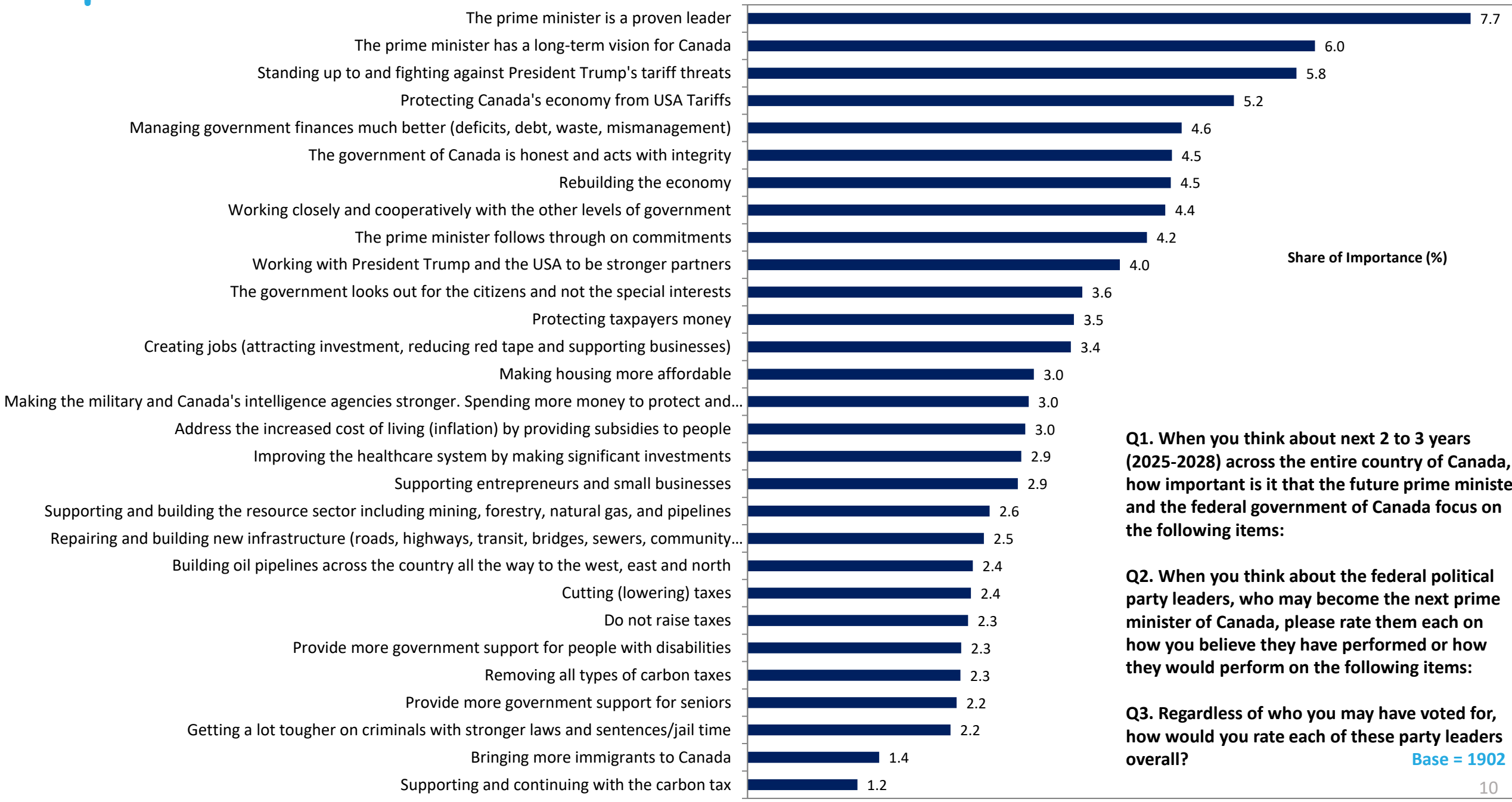
Slide 15 – Mark Carney and the LPC currently have a 15-point lead over the CPC in Ontario.

Slide 17 – 32% of respondents who said they would currently vote for Doug Ford’s Ontario PCs also said they would vote for the Mark Carney’s Liberal Party of Canada. Half of those who would currently vote for Marit Stiles’s Ontario NDP would also vote for the LPC.

Slide 20 – Doug Ford and the Ontario PCs currently have a 22-point lead over the OLP. The Ontario NDP and the Ontario Green Party are performing much better than their federal counterparts.

ADVANCED ANALYTICS

DRIVERS ANALYSIS - Q1 Attribute Drivers of Q3 Overall Rating (Total Sample)



Q1. When you think about next 2 to 3 years (2025-2028) across the entire country of Canada, how important is it that the future prime minister and the federal government of Canada focus on the following items:

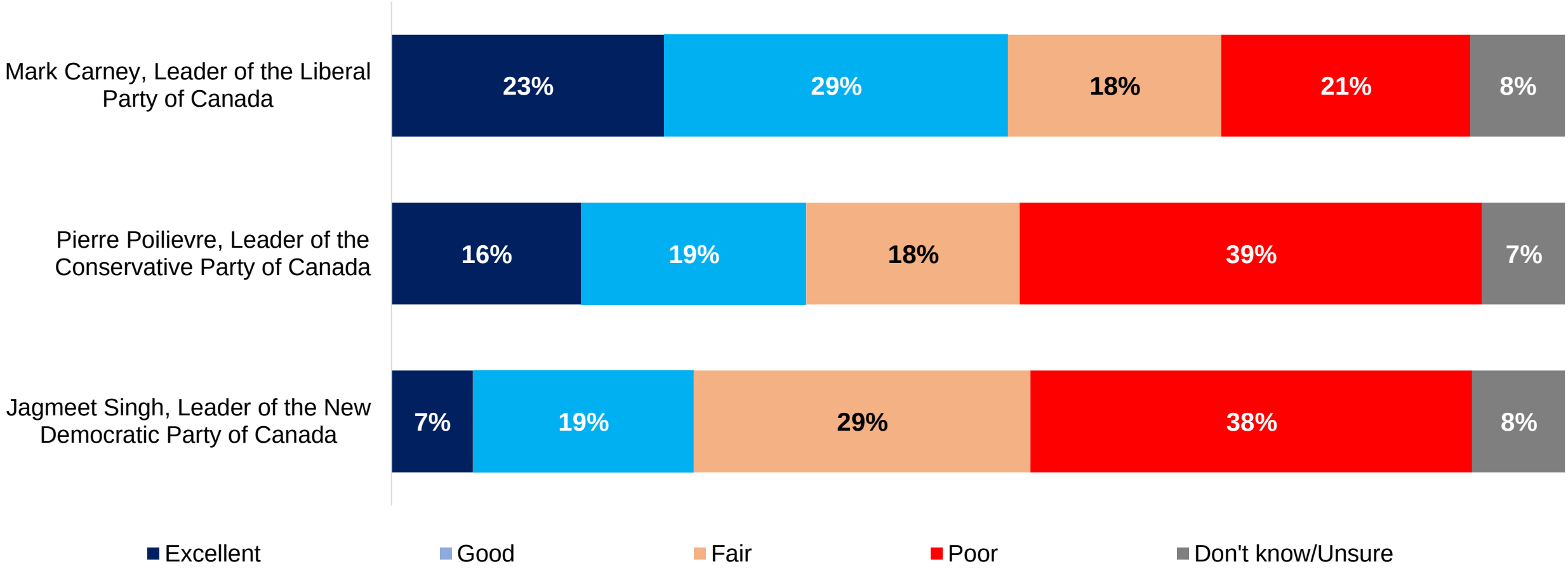
Q2. When you think about the federal political party leaders, who may become the next prime minister of Canada, please rate them each on how you believe they have performed or how they would perform on the following items:

Q3. Regardless of who you may have voted for, how would you rate each of these party leaders overall?

Base = 1902

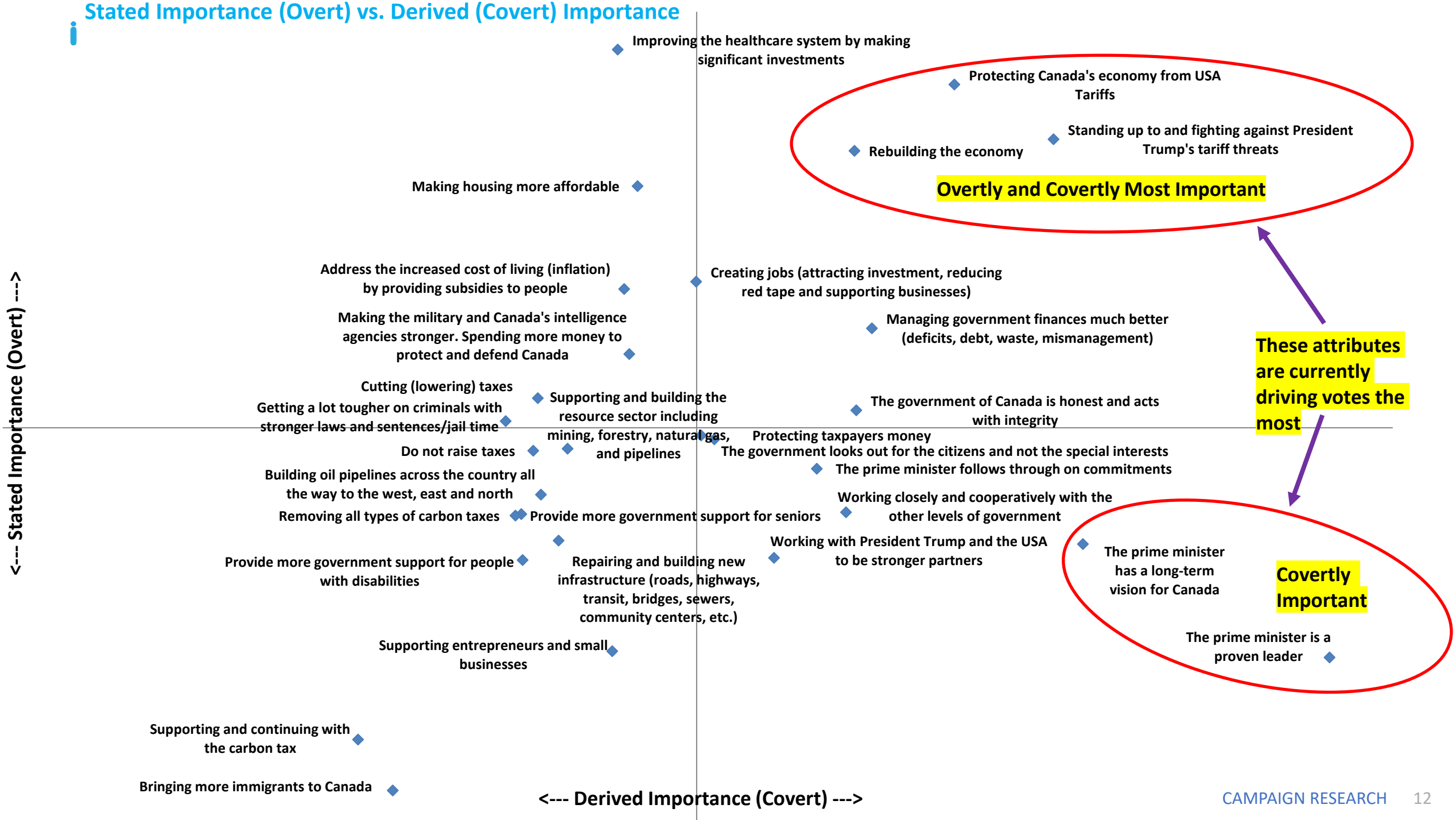
How would you rate each of these each of these leaders overall ?

Respondents were asked to rate each political leader overall. We evaluated correlations between how respondents rated the performance of each leader on each policy & leadership attribute with the overall ratings for each leader **to derive the "covert importance" of each policy & leadership attribute**. In other words, the "covert importance" often determines the actual importance of each policy & leadership attribute (what is driving leader ratings = what drives votes).



Q3. Regardless of who you may have voted for, how would you rate each of these party leaders overall? Base = 1902

Stated Importance (Overt) vs. Derived (Covert) Importance



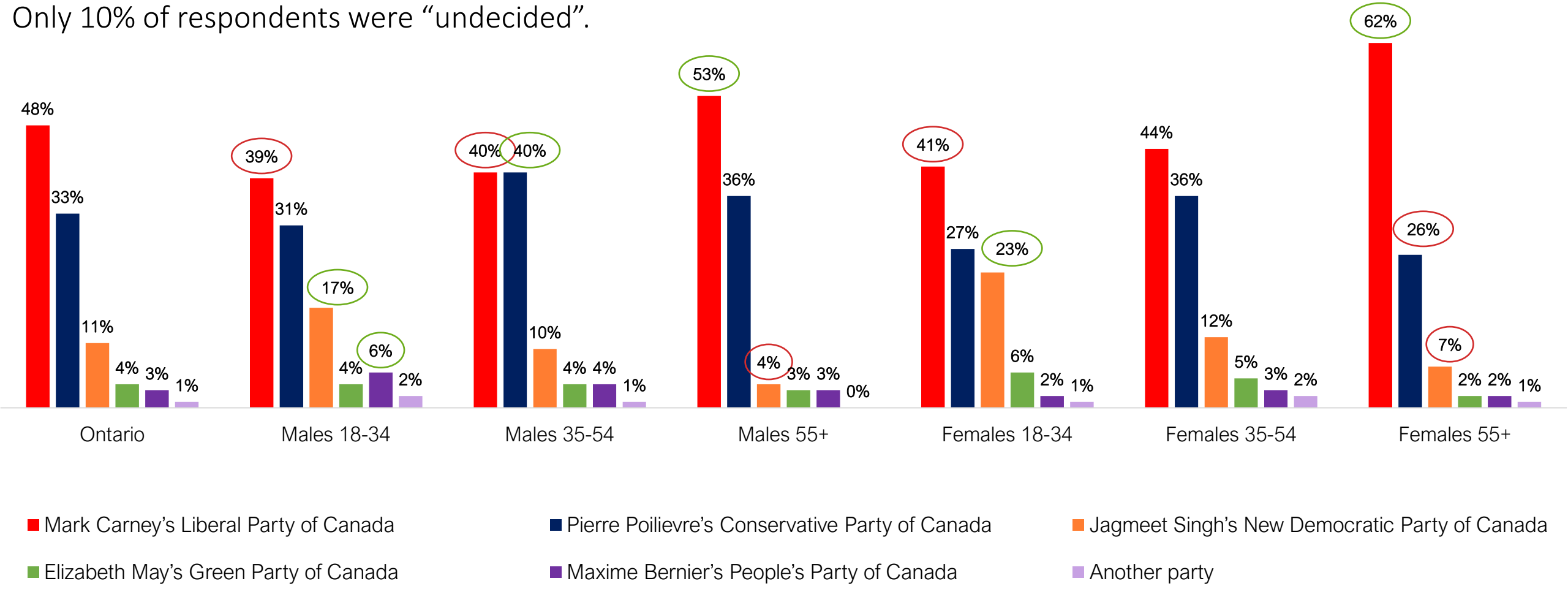
Leader Relative Performance on Q2 Attributes (TB)

❑ Federal Ballot Test

Decided Federal Ballot with Leader name and Party name (n=1703)

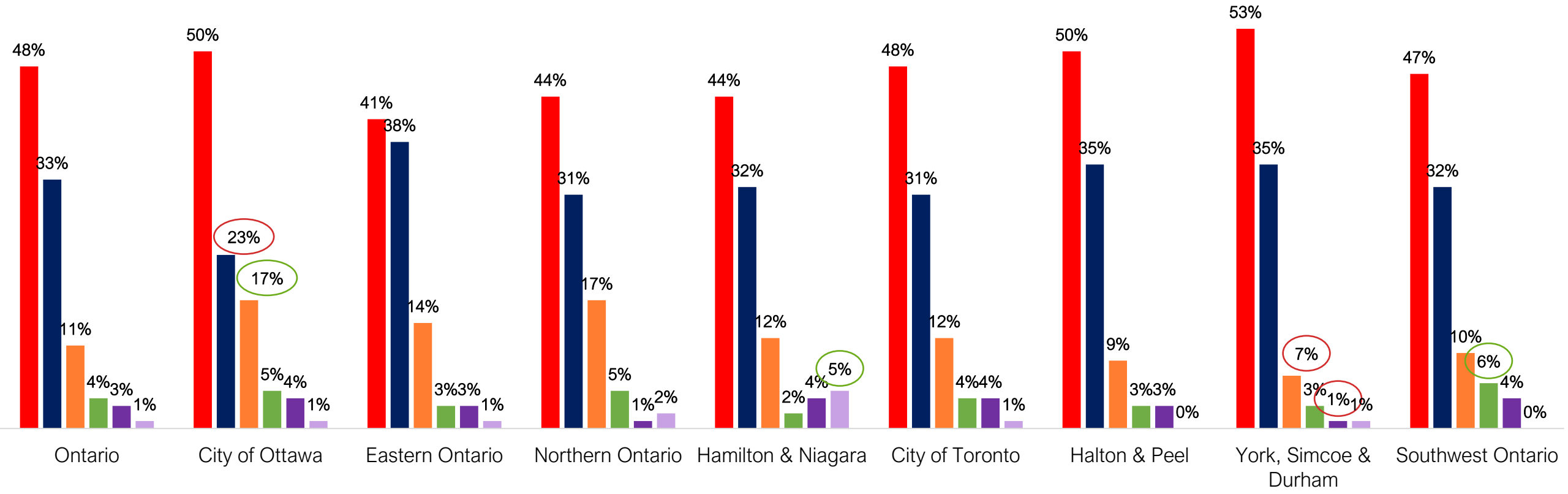
The LPC had gigantic leads with both males and females over 54 years of age. The LPC were competitive and leading with both males and females 18-54 years of age. The CPC trailed – significantly - with females over 55 years of age (36-points). The CPC had a base of support with all males and females and performed much better with those under 55 years of age. The NDP performed terribly with all males and females over 34 years of age.

Only 10% of respondents were "undecided".



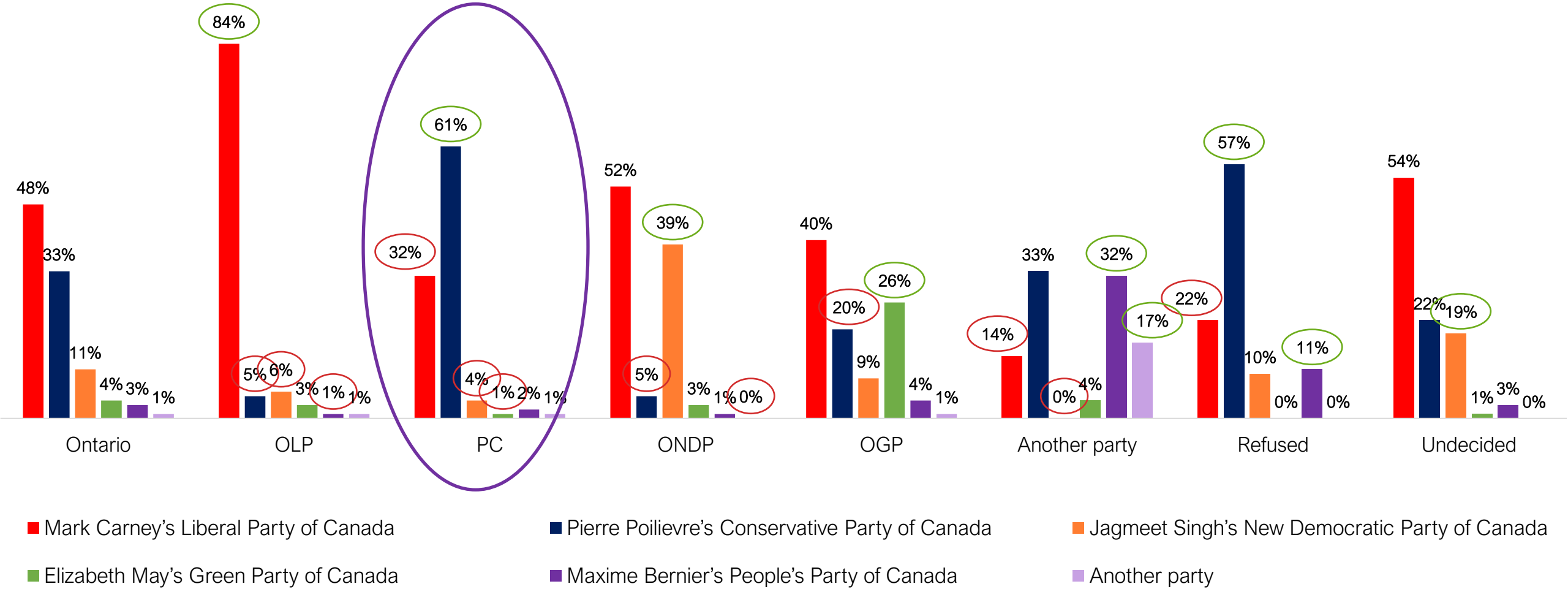
Decided Federal Ballot with Leader name and Party name (n=1703)

The LPC lead across all regions with super large leads in all regions except Eastern Ontario (not including the City of Ottawa).



Decided Federal Ballot with Leader name and Party name (n=1703)

32% of respondents who said they currently would vote for Doug Ford's Ontario PCs also said they would be voting for the Carney Liberal Party of Canada. Half of those who would currently vote for Stiles's Ontario NDP would also currently vote for the LPC.

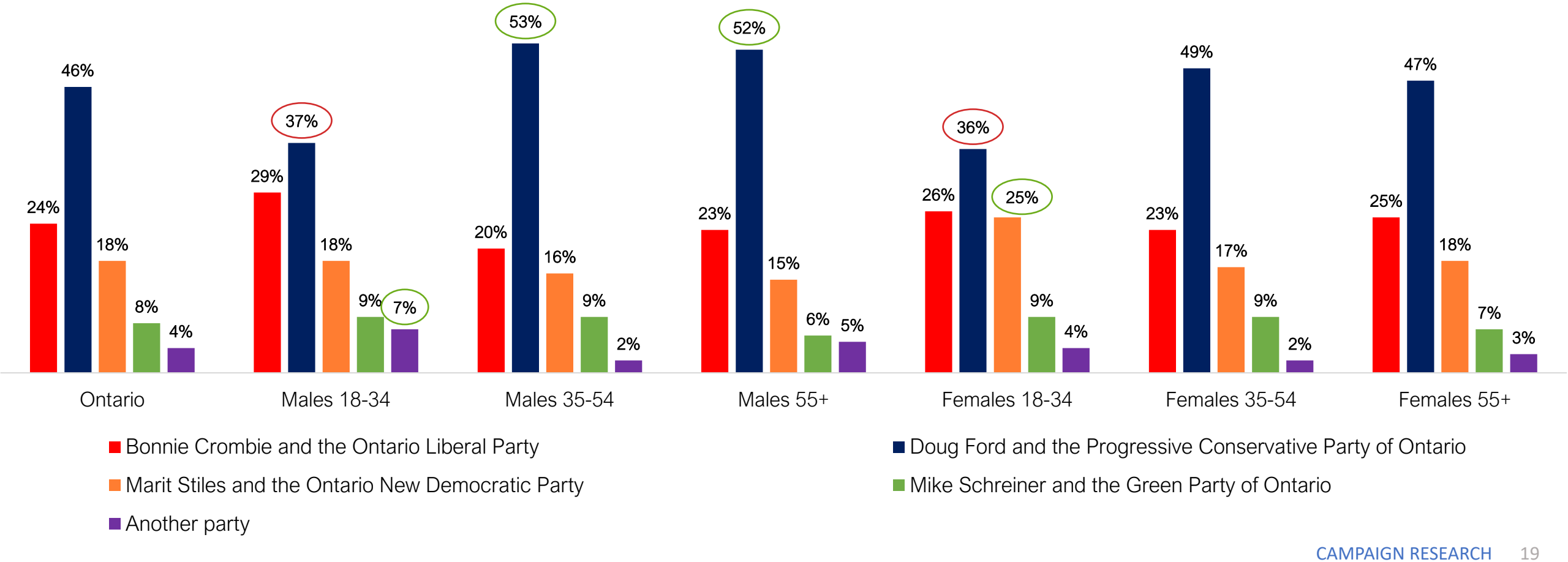


❑ Provincial Vote

Decided Federal Ballot with Leader name and Party name (n=1672)

The Ontario PCs dominated with all males and females over 35 years of age. The OLP had a base of support with all males and females. The ONDP performed somewhat better with males and females under 35 years of age compared to their overall average.

Note: The ONDP and the Ontario Greens are performing much better than their federal counterparts.



Decided Federal Ballot with Leader name and Party name (n=1672)

The PCs held commanding leads across all 8 regions of Ontario. The OLP performed better in the City of Toronto and in the York/ Simcoe/ Durham Region compared to their average. The ONDP performed better than expected in Northern Ontario & in the City of Ottawa.

Note: The big and noticeable difference in support between the federal and provincial ballot tests support is the LPC strength in the City of Ottawa.