



MARKET RESEARCH & BUSINESS INTELLIGENCE SERVICES

WHAT'S YOUR CHALLENGE?

1 March 2024

Road Infrastructure Presentation for RCCAO and ORBA



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METHODOLOGY

METHODOLOGY

Road Infrastructure Study – 1 March 2024

Quantitative Market Research – Ontario

This study was conducted from Feb 28th 2024 to March 1st 2024, among a sample of 1959 respondents who are residents of 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%, 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 old and older. The sample is weighted to regional, age and gender demographics, as per Statistics Canada.

STATS TESTING

-  Significantly higher than Ontario
-  Significantly lower than Ontario

EXECUTIVE SUMMARY

Overview - GTA West Highway (413) (Slides 11-17)

57% of respondents were aware of the GTA West Highway (413). Awareness was higher with males than it was with females and higher with older respondents than it was with younger respondents. Awareness of this highway was significantly higher compared to the previous study commissioned by the RCCAO in June 2021, up from 33% (awareness).

Not surprisingly, awareness was highest in the GTHA and was significantly higher across all regions of the province compared to June 2021. Interestingly, awareness was lowest with PC Party supporters (as it was in June 2021) and relatively high across all party lines. Awareness was still very low with voters who were “undecided” about who they would vote (in a provincial election) and with those respondents that “refused” to say who they would vote for.

55% of respondents supported Highway 413 (no change from June 2021) while 28% of respondents opposed Highway 413 (+5% compared to June 2021). That’s 2 to 1 who supported the 413. Only females over 55 years of age were more even split on their support/ opposition to Highway 413.

Opposition to Highway 413 was very low compared to support across all the regions of Ontario. Support for the highway was significantly higher in the Halton-Peel region compared to all other regions. There were a significant number of supporters of Highway 413 across all party lines – including OLP supporters. Those respondents who remained “undecided” about who they would vote for were also 2 to 1 in favour of Highway 413.

Overview – Bradford Bypass (Slides 18-24)

45% of respondents were aware of the Bradford Bypass. Awareness was significantly higher with males than it was with females. Awareness of the Bradford Bypass overall, was significantly higher compared to June 2021, up from 23% (awareness).

Despite awareness being twice as high as it was in June 2021, overall awareness of the Brad Bypass - across many of the regions of Ontario - was relatively low. Awareness was significantly higher in the City of Toronto, York, Simcoe, Durham and the Halton-Peel regions. Awareness across party lines was relatively the same but awareness was significantly lower with those who were “undecided” as to who they would vote for (in a provincial election). Awareness was significantly higher with the “millennial, more urban, better educated & affluent” voter segment (they mostly live in the GTA).

56% of respondents supported the Bradford Bypass (no change from June 2021) while 24% of respondents were opposed (+9% compared to June 2021). That’s more than 2 to 1 who supported the highway. There was significantly more opposition (compared to the average) from both males and females over 55 years of age.

Opposition to the Bradford Bypass was very low compared to support levels across all the regions of Ontario. Support for the highway was significantly higher in the Halton-Peel and the York, Simcoe and Durham regions. There were a significant number of supporters of the Bradford Bypass – across all party lines. Those respondents who remained “undecided” about who they would vote for (in a provincial election) were also more than 2 to 1 in favour of the Bradford Bypass.

Ring of Fire development project (Slides 25-31)

38% of respondents were aware of the Ring of Fire development project. Awareness was significantly higher with males compared to females. Awareness of the project was significantly higher compared to June 2021, up from 19% (awareness).

Despite awareness being twice as high as it was in June 2021, overall awareness of the Ring of Fire development project - across many of the regions of Ontario - was relatively low. Awareness was significantly higher in Northern Ontario. Awareness across party lines was relatively the same. Awareness of the Ring of Fire development project was significantly higher with the “hard-left, left-wingers” voter segment as they were the only respondents who were opposed to the development.

66% of respondents supported the Ring of Fire development project (no change from June 2021) while 14% of respondents were opposed (+3% compared to June 2021). That’s more than 4 to 1 support with some basic information provided. Support was even stronger among males compared to females. Females were somewhat more “unsure” of the project compared to males.

Opposition to the project was very low compared to support levels across all the regions of Ontario. Support for the development was significantly higher in the City of Ottawa and Northern Ontario. There were a significant number of supporters of the Ring of Fire development – across all party lines – especially with OLP supporters. Those respondents who remained “undecided” about who they would vote for (in a provincial election) were also more than 4 to 1 in favour of the development.

Government Funding of Road Infrastructure (where you live) (Slides 32-35)

2 to 1, respondents chose “the government needs to build more or expand more roads and more highways (where they live) instead of “the government should stop building or expanding more roads and more highways (where they live). Only females over 55 years of age were more evenly split on this question.

A majority of respondents chose “the government needs to build or expand more roads and more highways (where they live) in every region of Ontario. A majority of respondents that supported the OLP and those who were “undecided” about who they would vote for (in a provincial election) chose “the government needs to build more or expand more roads and more highways (where they live). Even ONDP and Green Party supporters were more evenly split on this forced choice question.

Government Funding of Road Infrastructure (across the province) (Slides 36-38)

2 to 1, respondents chose “the government needs to build more or expand more roads and more highways (across the province) over “government should stop building or expanding more roads and more highways (across the province). Females over 55 years of age were evenly split on this question.

A majority of respondents chose “the government needs to build more or expand more roads and more highways (across the province) in every region of Ontario. A majority of respondents that supported the OLP and those respondents who were “undecided” about who they would vote for (in a provincial election) chose “the government needs to build more or expand more roads and more highways (across the province). Even ONDP and Green Party supporters were quite evenly split on this forced choice question.

i Executive Summary

Minister Guilbeault recent comments (Slides 39-41)

55% of respondents disagreed with the Minister's recent comments that the federal government should stop investing in new road infrastructure, while 33% agreed. Males disagreed much more than females did, but ~50% females also disagreed.

Disagreement was high with respondents across all regions of Ontario, with even half of the respondents in the City of Ottawa and City of Toronto also disagreeing that the federal government should stop investing road infrastructure. There was a significant level of disagreement with supporters across party lines.

Provincial Politics (Slides 42-44)

41% - PCs, 27% - OLP, 18% - ONDP and 9% - Greens. The PCs have a commanding lead with all males and with females under 55 years of age. The OLP was only competitive with females 55 years of age & older. The OLP trails the PCs across all regions of Ontario and currently was only somewhat competitive in the City of Mississauga and the City of Toronto.

Federal Politics (Slides 45-47)

42% - CPC, 28% - LPC, 17% - NDP, 8% - Greens. The CPC have a commanding lead with all males and is competitive and/or leading with most women. The LPC is only competitive with females 35 years of age and older. The LPC trails the CPC across all regions of Ontario except the City of Ottawa region. The LPC was also competitive in the City of Toronto. Green Party support is negatively impacting growth for the LPC with females.

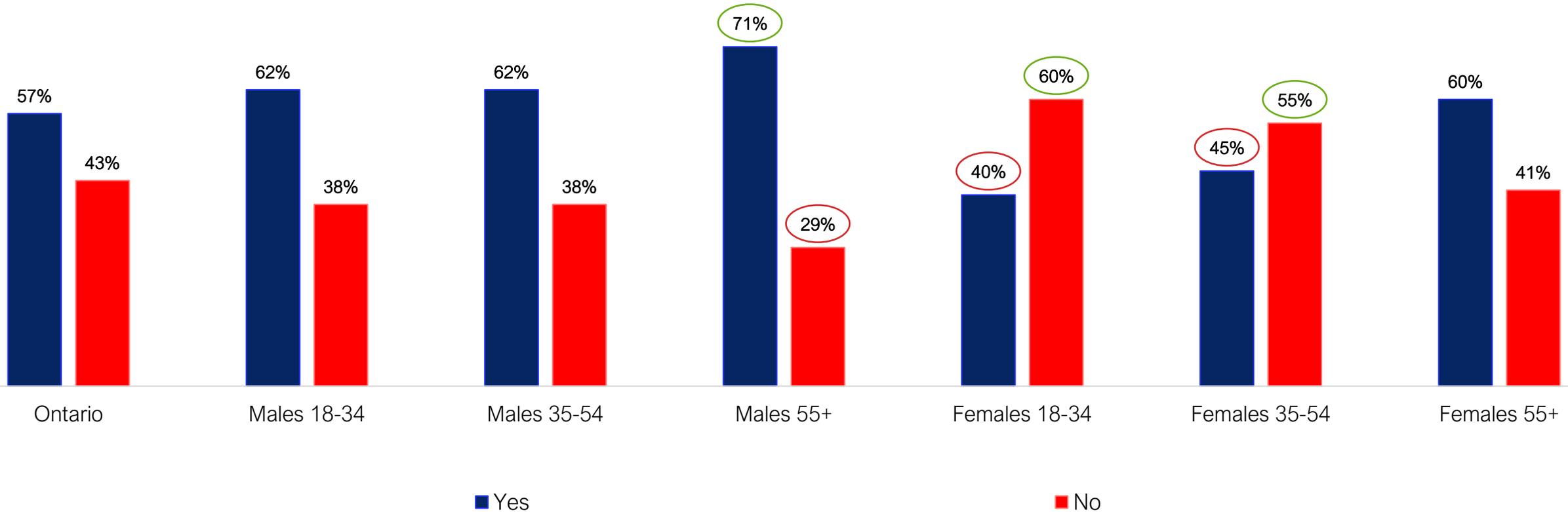
Highway 413

Awareness of the GTA West Highway project or Highway 413

Age and Gender

57% of respondents were aware of the proposed GTA West Highway (413). Awareness was higher with males than it was with females. Awareness was somewhat higher with older respondents compared to younger respondents.

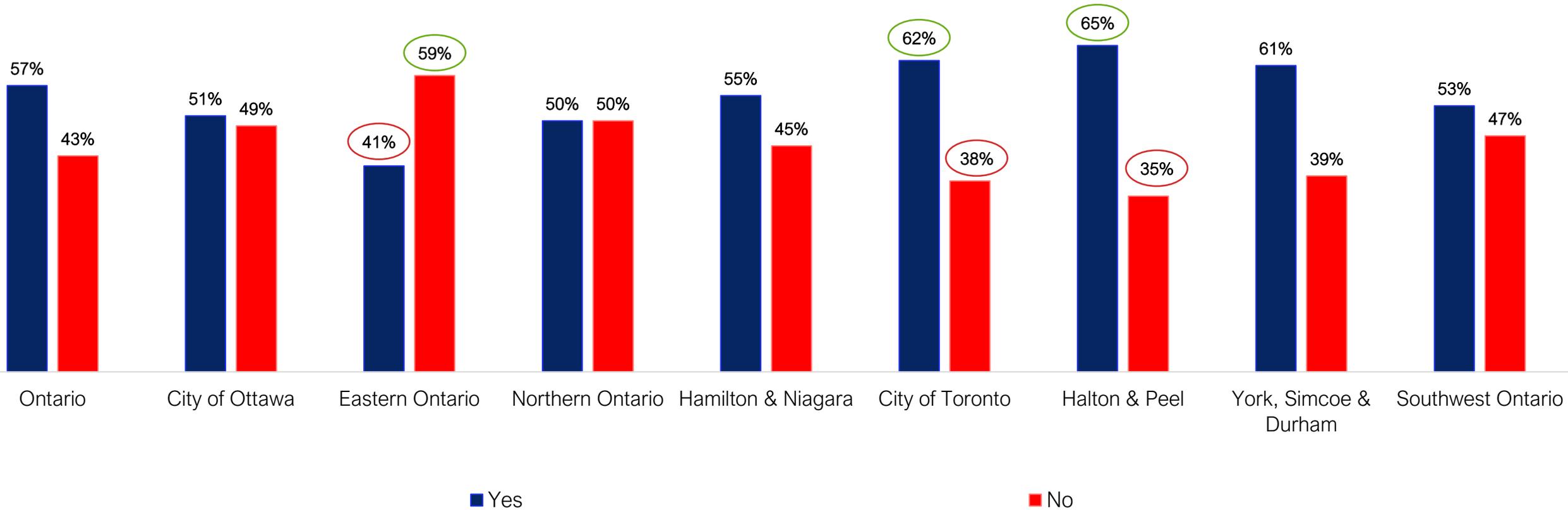
Awareness of this highway was significantly higher compared to June 2021, up from 33% (awareness) .



Q1 - The government of Ontario has committed to building a highway along the western region of the Greater Toronto Area, commonly known as the GTA West Highway or Highway 413. Are you aware of this Highway Project? Base = 1959

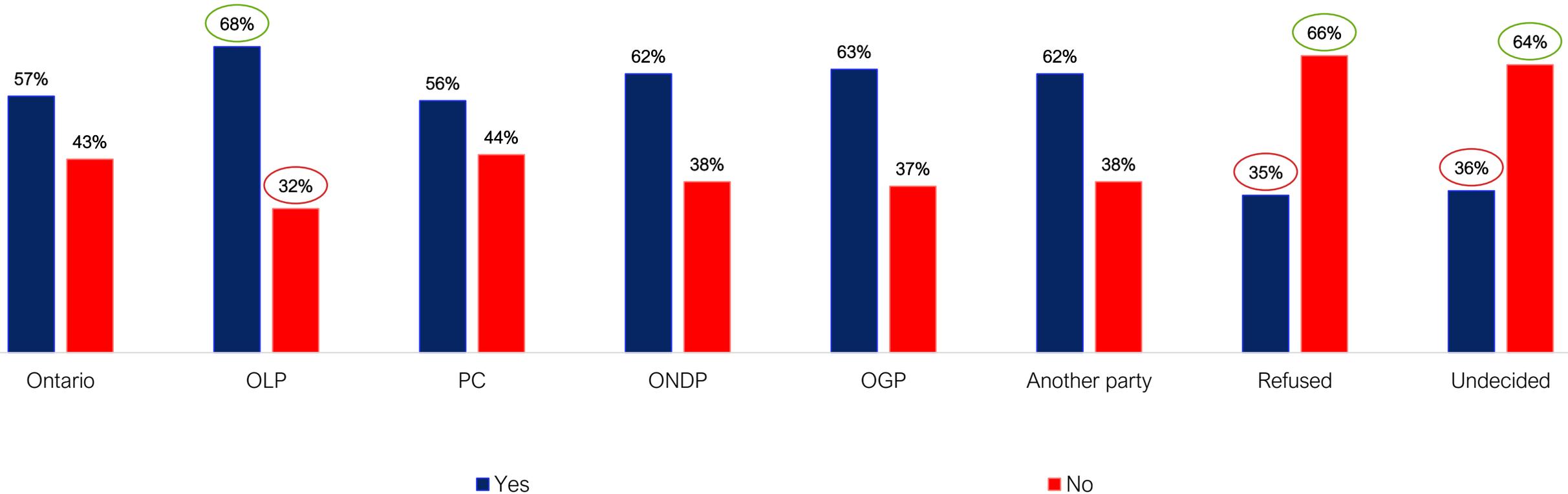
Awareness of the GTA West Highway project or Highway 413

Awareness was highest in the GTHA and was significantly higher across all regions of the province compared to June 2021.



Q1 - The government of Ontario has committed to building a highway along the western region of the Greater Toronto Area, commonly known as the GTA West Highway or Highway 413. Are you aware of this Highway Project? Base = 1959

Interestingly, awareness was lowest with PC Party supporters (as it was in June 2021) and relatively high across all party lines. Awareness was still very low with voters who were “undecided” about who they would vote (in a provincial election) and with those voters that “refused” to say who they would vote for.

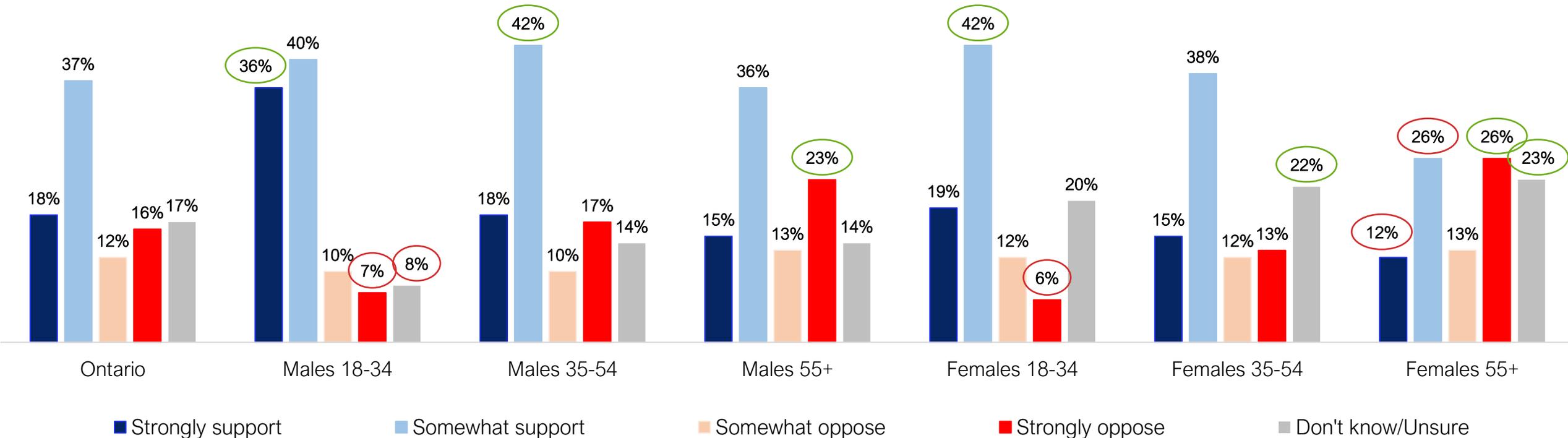


Q1 - The government of Ontario has committed to building a highway along the western region of the Greater Toronto Area, commonly known as the GTA West Highway or Highway 413. Are you aware of this Highway Project? Base = 1959

Do you support or oppose the building of the GTA West highway

Age and Gender

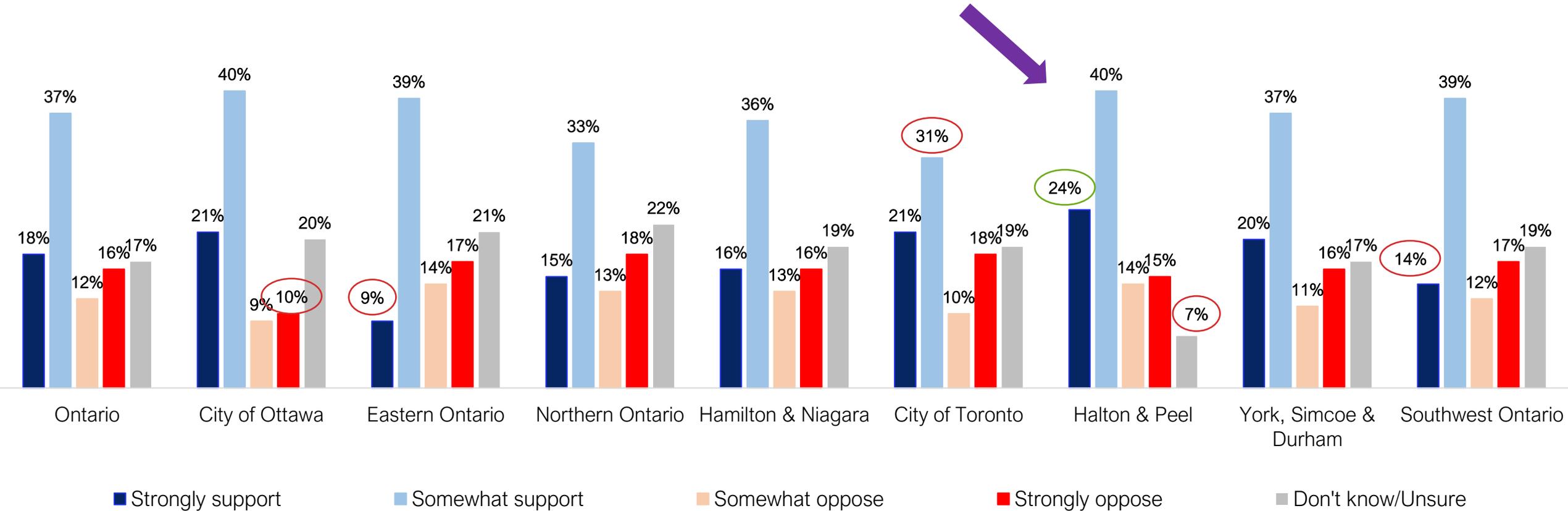
55% of respondents supported the 413 (no change from June 2021) while 28% of respondents opposed Highway 413 (+5 compared to June 2021). That's 2 to 1 support with some basic information provided about population growth in the region. Only females over 55 years of age were even split on their support/ opposition to Highway 413.



Q2 - The Government of Ontario sees this as critical highway infrastructure that will be needed due to population growth expected in the Greater Toronto Area and Greater Golden Horseshoe Area. The proposed GTA West Highway will address transportation needs in the area of York, Peel and Halton regions and will help alleviate traffic congestion and improve the movement of people and goods. Based on what you know about this proposed Highway, do you support or oppose the building of the GTA West highway? Base = 1959

Do you support or oppose the building of the GTA West highway

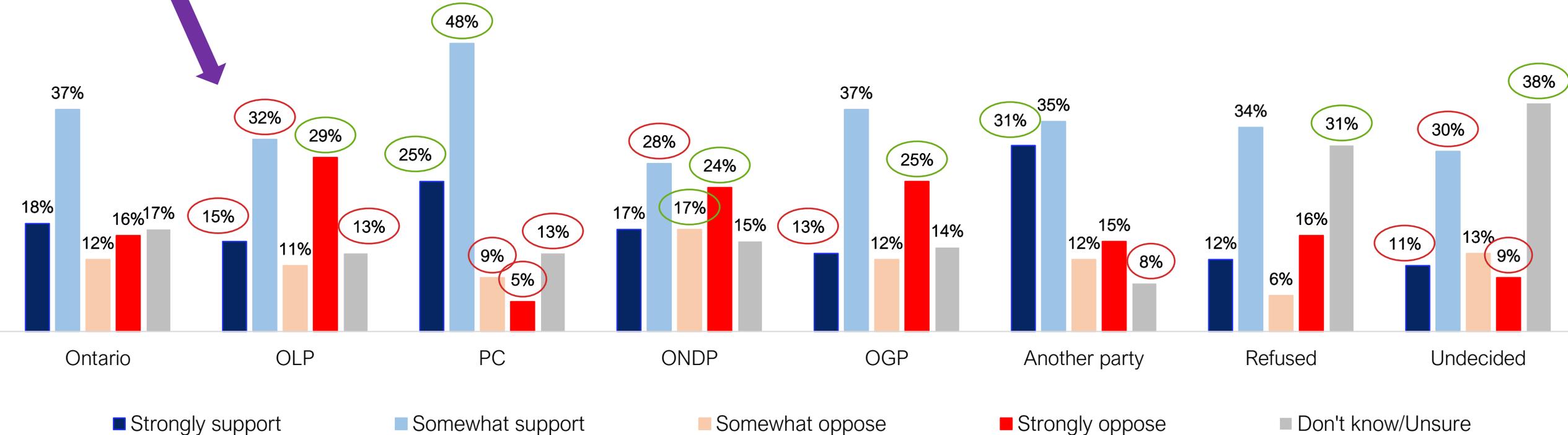
Opposition to Highway 413 was very low compared to support across all the regions of Ontario. Support for the highway was significantly higher in the Halton-Peel region compared to all other regions.



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Do you support or oppose the building of the GTA West highway

There were a significant number of supporters of Highway 413 across all party lines – including OLP supporters. Those respondents who remained “undecided” about who they would vote for were also 2 to 1 in favour of the 413.



Q2 - The Government of Ontario sees this as critical highway infrastructure that will be needed due to population growth expected in the Greater Toronto Area and Greater Golden Horseshoe Area. The proposed GTA West Highway will address transportation needs in the area of York, Peel and Halton regions and will help alleviate traffic congestion and improve the movement of people and goods. Based on what you know about this proposed Highway, do you support or oppose the building of the GTA West highway? Base = 1959

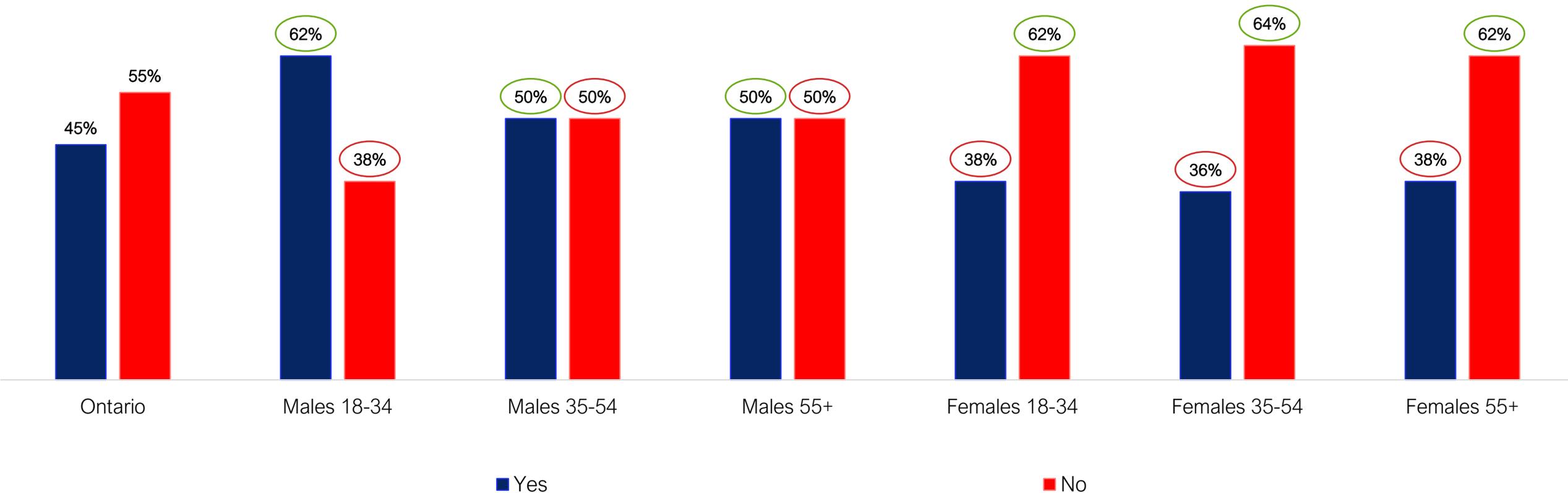
Bradford Bypass

Awareness of the Bradford Bypass Highway project

Age and Gender

45% of respondents were aware of the proposed Bradford Bypass Highway. Awareness was significantly higher with males than it was with females.

Awareness of this highway was significantly higher compared to June 2021, up from 23% (awareness).

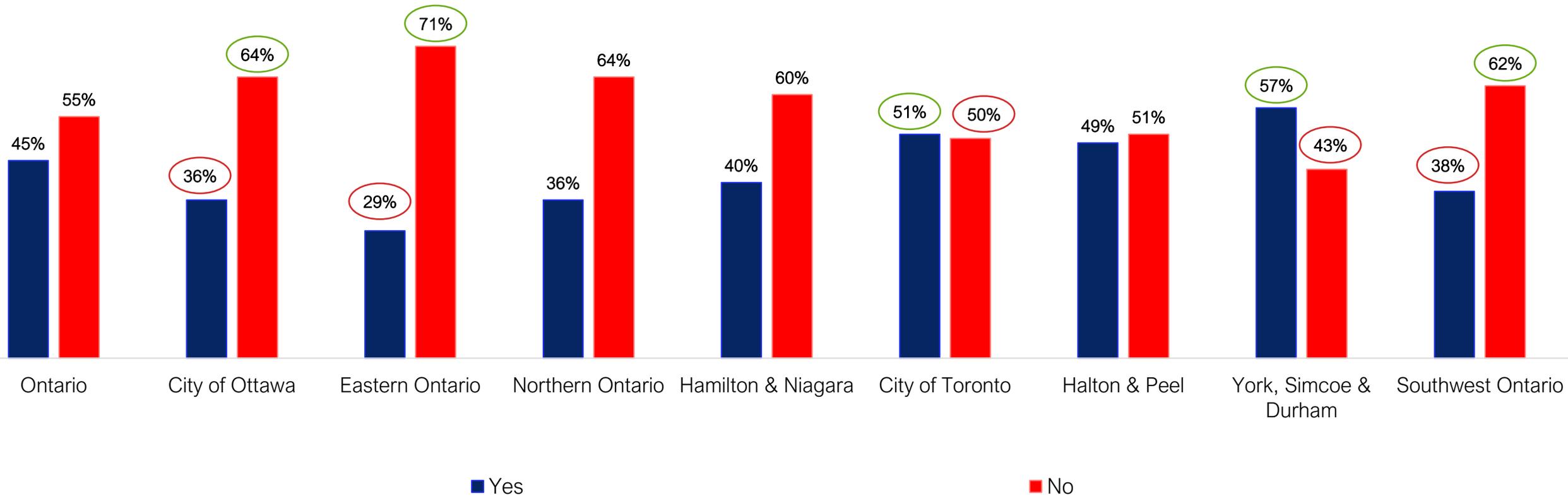


Q3 - The government of Ontario plans to build a new highway that connects Highway 400 and Highway 404 as a way to manage the expected population growth and travel demand in the area. Are you aware of this Highway Project? Base = 1959

Awareness of the Bradford Bypass Highway project

Regions

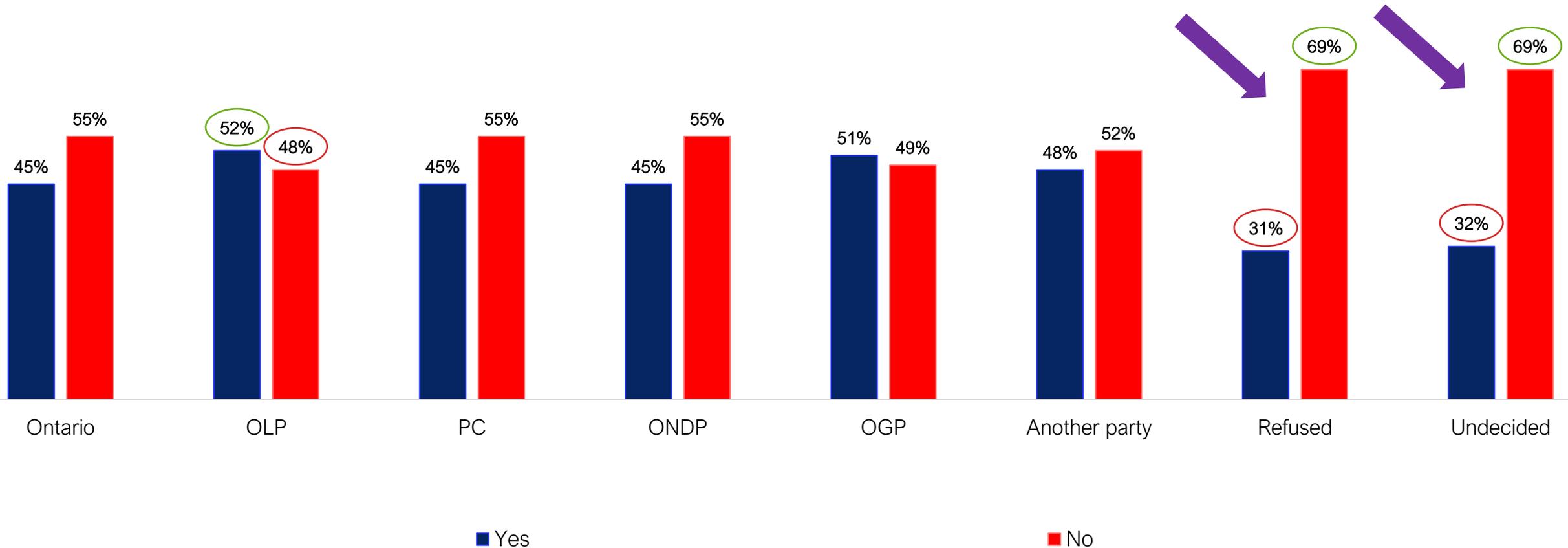
Despite awareness being twice as high as it was in June 2021, overall awareness of the Brad Bypass - across many of the regions of Ontario - was relatively low. Awareness was significantly higher in the City of Toronto, York, Simcoe, Durham and the Halton-Peel regions compared to all other regions of Ontario.



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Awareness of the Bradford Bypass Highway project

Awareness across party lines was relatively the same but awareness was significantly lower with those who were “undecided” as to who they would vote for (in a provincial election) and also with those who “refused” to say who they would for.

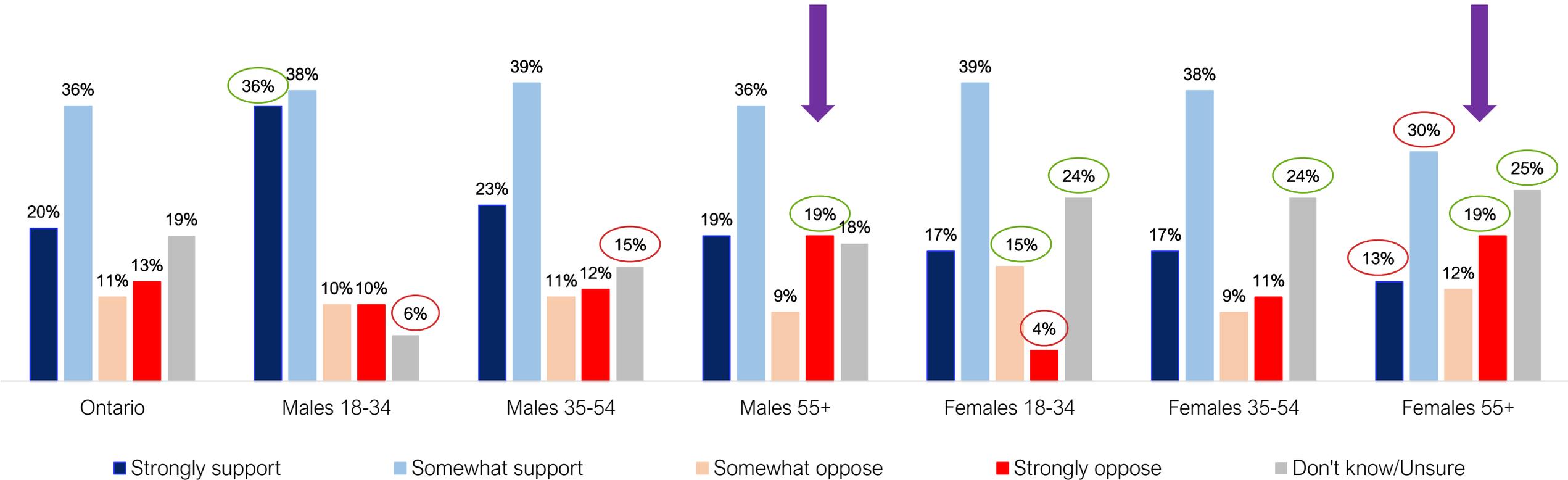


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Do you support or oppose the building of the Bradford Bypass Highway

Age and Gender

56% of respondents supported the Bradford Bypass (no change from June 2021) while 24% of respondents were opposed (+9 compared to June 2021). That's more than 2 to 1 support with some basic information provided about population growth in the region. There was significantly more opposition for the Bradford Bypass from both males and females over 55 years of age.

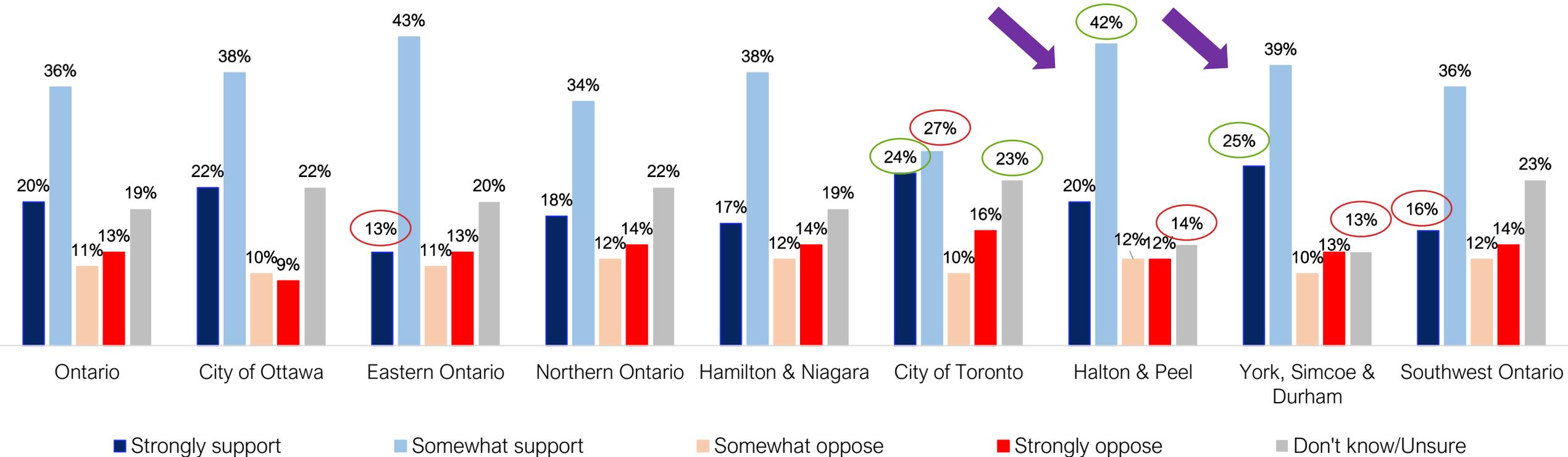


Q4 - The Ontario Government sees this as critical highway infrastructure that will be needed due to the population growth in York Region, the Greater Toronto Area and Greater Golden Horseshoe Area. The Bradford Bypass Highway will relieve congestion on the existing local roads and provide a new highway connection between Highway 400 & Highway 404 saving drivers and commercial trucks travel time.

Based on what you know about this project, do you support or oppose the building of the Bradford Bypass Highway? **Base = 1959**

Do you support or oppose the building of the Bradford Bypass Highway

Opposition to the Bradford Bypass was very low compared to support across all the regions of Ontario. Support for the highway was significantly higher in the Halton-Peel and the York, Simcoe and Durham regions compared to all other regions.

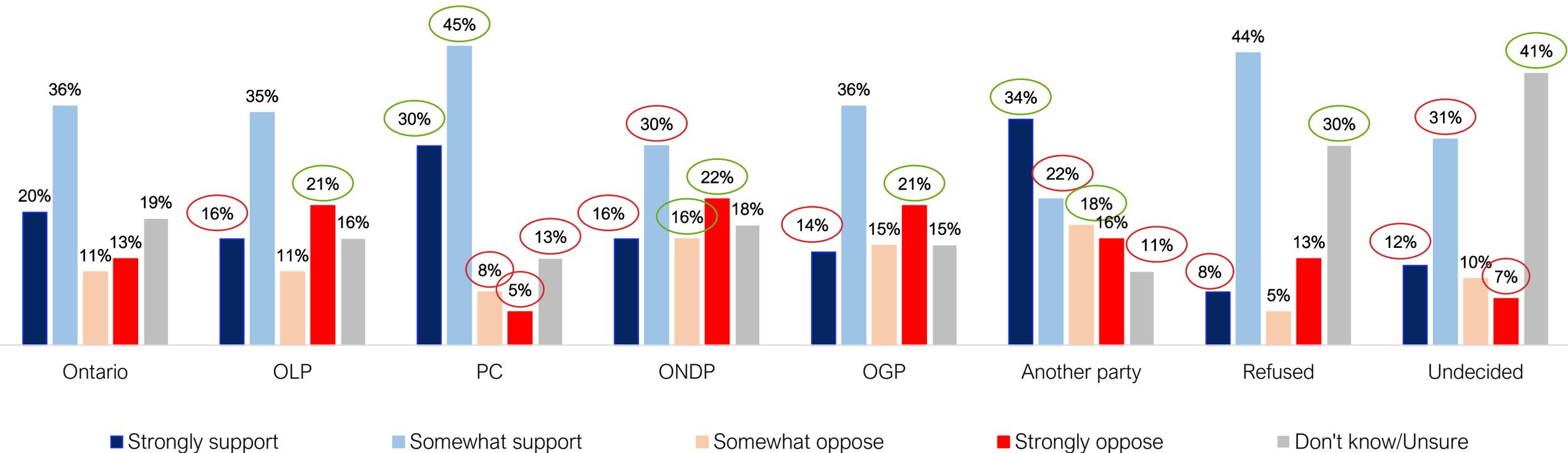


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Based on what you know about this project, do you support or oppose the building of the Bradford Bypass Highway? **Base = 1959**

Do you support or oppose the building of the Bradford Bypass Highway

There were a significant number of supporters of the Bradford Bypass – across all party lines – including OLP supporters. Those respondents who remained “undecided” about who they would vote for were also more than 2 to 1 in favour of the Bradford Bypass.



Q4 - The Ontario Government sees this as critical highway infrastructure that will be needed due to the population growth in York Region, the Greater Toronto Area and Greater Golden Horseshoe Area. The Bradford Bypass Highway will relieve congestion on the existing local roads and provide a new highway connection between Highway 400 & Highway 404 saving drivers and commercial trucks travel time.

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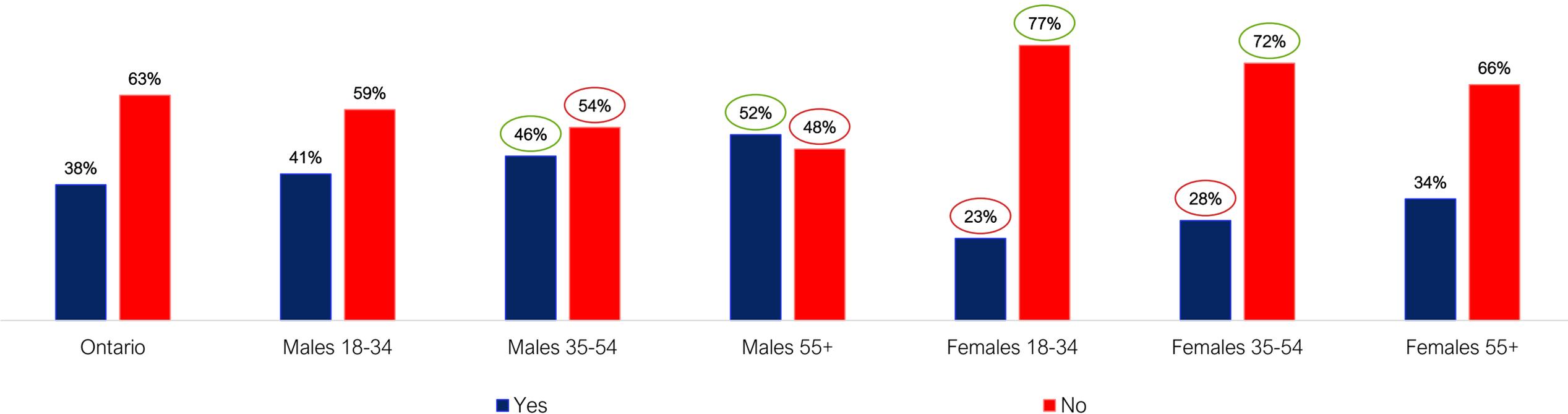
Ring of Fire

Awareness of the Ring of Fire development project

Age and Gender

38% of respondents were aware of the Ring of Fire development project. Awareness was significantly higher with males than it was with females.

Awareness of the Ring of Fire development project was significantly higher compared to June 2021, up from 19% (awareness).

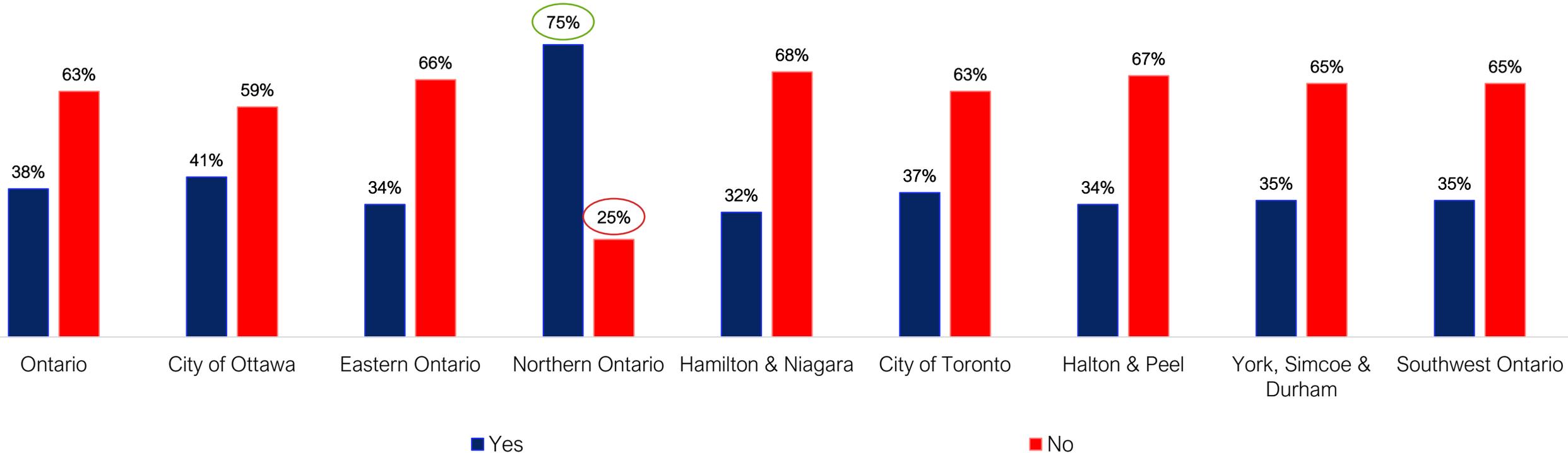


Q5 - The Ring of Fire is one of the most promising mineral development opportunities in over 100 years. Located in Ontario's Far North, current estimates suggest a multi-generational potential of chromite production, as well nickel, copper, platinum and gold. Much of the area lacks critical infrastructure, including roads, electricity and broadband internet access. It is located within the traditional lands of the Matawa First Nations. These areas can only be accessed by the remote airport and/or winter road. They are not connected to the provincial electricity grid. Are you aware of the Ring of Fire development project? Base = 1959

Awareness of the Ring of Fire development project

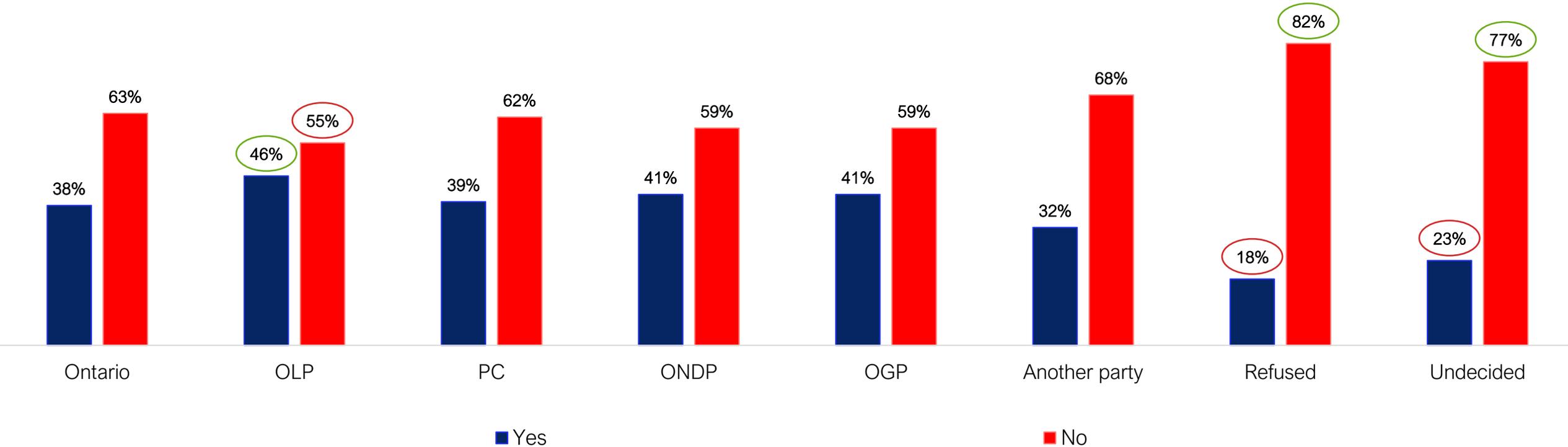
Regions

Despite awareness being twice as high as it was in June 2021, overall awareness of the Ring of Fire development project - across many of the regions of Ontario - was relatively low. Awareness was significantly higher in Northern Ontario.



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Awareness across party lines was relatively the same but awareness was significantly lower with those who were “undecided” as to who they would vote for (in a provincial election) and also with those who refused to say who they would vote for.

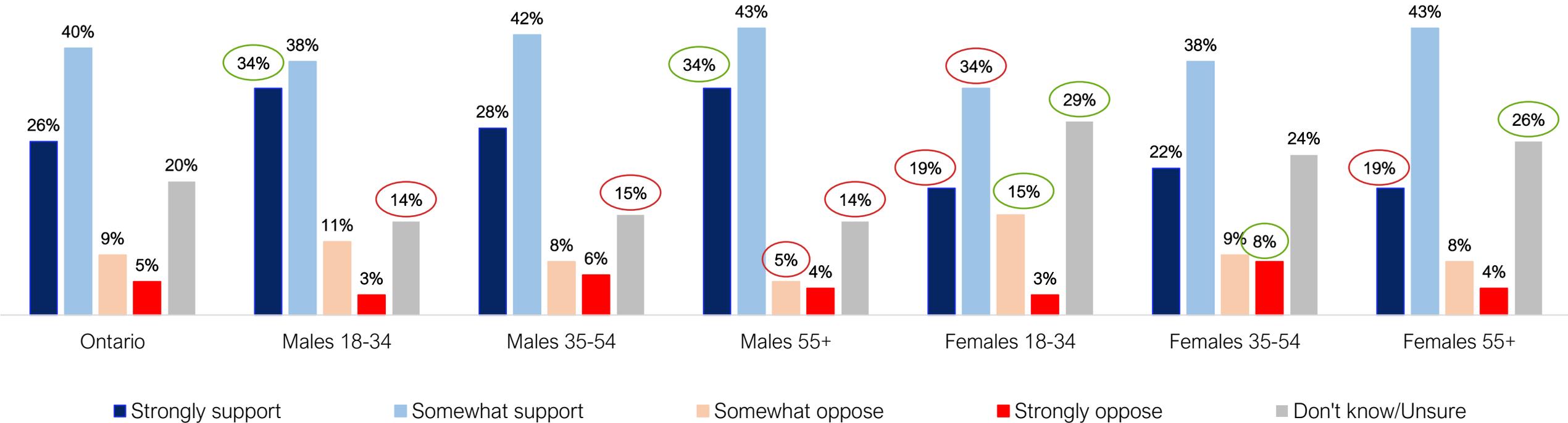


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Do you support or oppose the building of the Ring of Fire development project

Age and Gender

66% of respondents support the Ring of Fire development project (no change from June 2021) while 14% of respondents were opposed (+3 compared to June 2021). That's more than 4 to 1 support with some basic information provided. Support was even stronger among males compared to females. Females were more "unsure" compared to males.

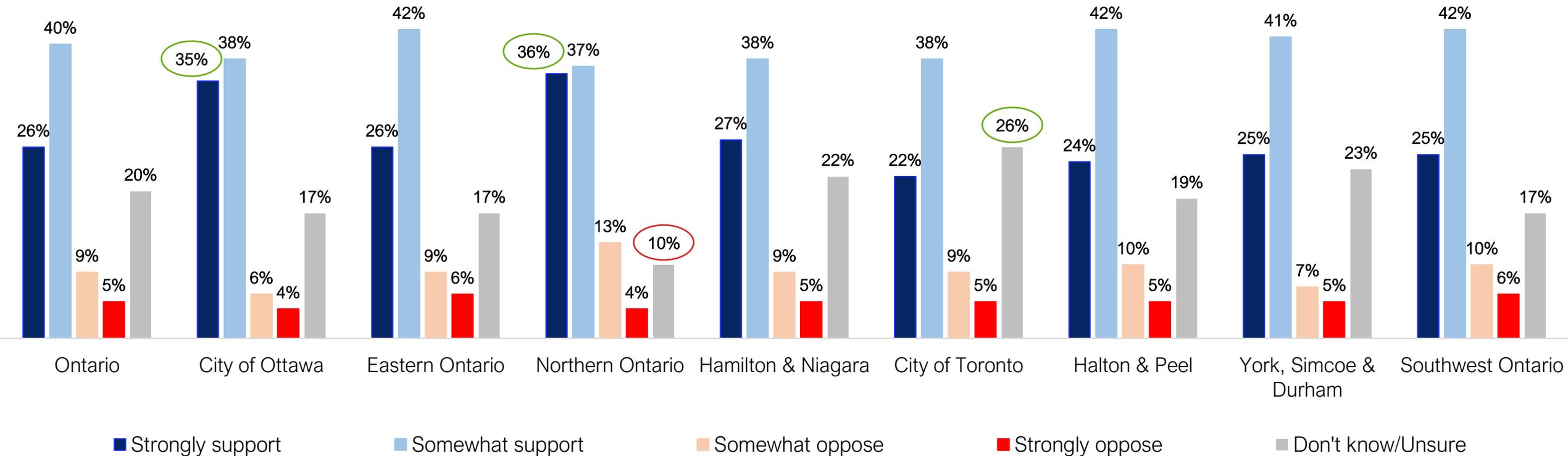


Q6 - The government of Ontario is working directly with First Nations partners to build the necessary infrastructure to unlock the mineral resources in the Ring of Fire. Better road infrastructure in the north, including all-season roads, will reduce the cost of goods, fuel and construction materials. These roads will also provide communities with better access to primary health care and other services. Based on what you know about this proposed development, do you support or oppose the building of the roads to the Ring of Fire?

Do you support or oppose the building of the Ring of Fire development project

Regions

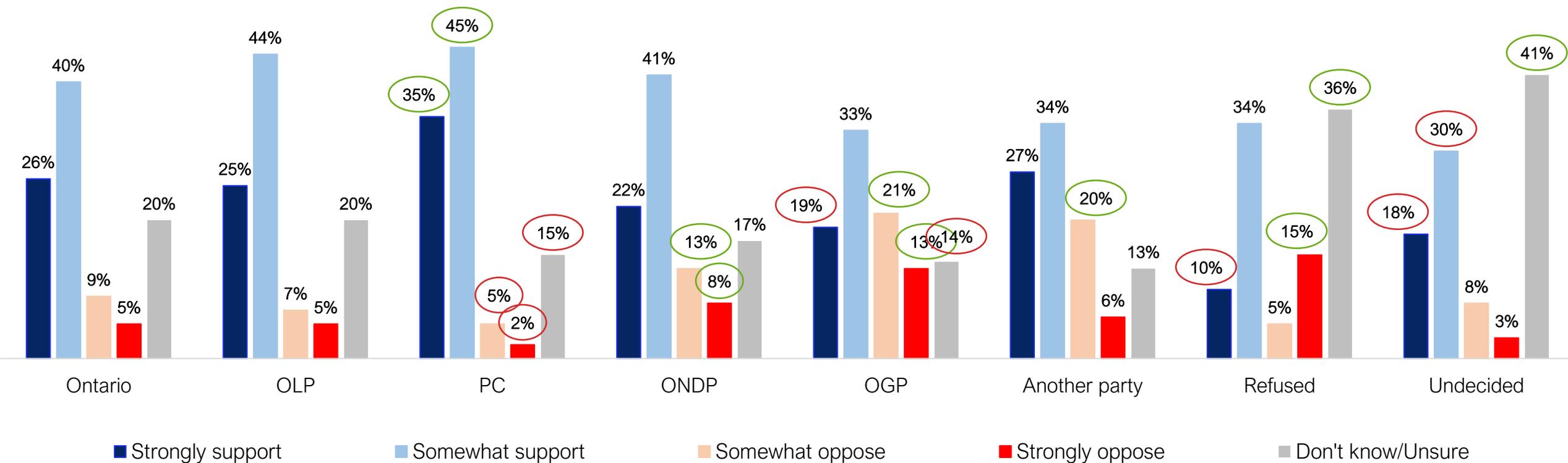
Opposition to the Ring of Fire development project was very low compared to support across all the regions of Ontario. Support for the development was significantly higher in the City of Ottawa and Northern Ontario compared to all other regions.



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Do you support or oppose the building of the Ring of Fire development project

There were a significant number of supporters of the Ring of Fire development – across all party lines – especially with OLP supporters. Those respondents who remained “undecided” about who they would vote for were also more than 4 to 1 in favour of the development.

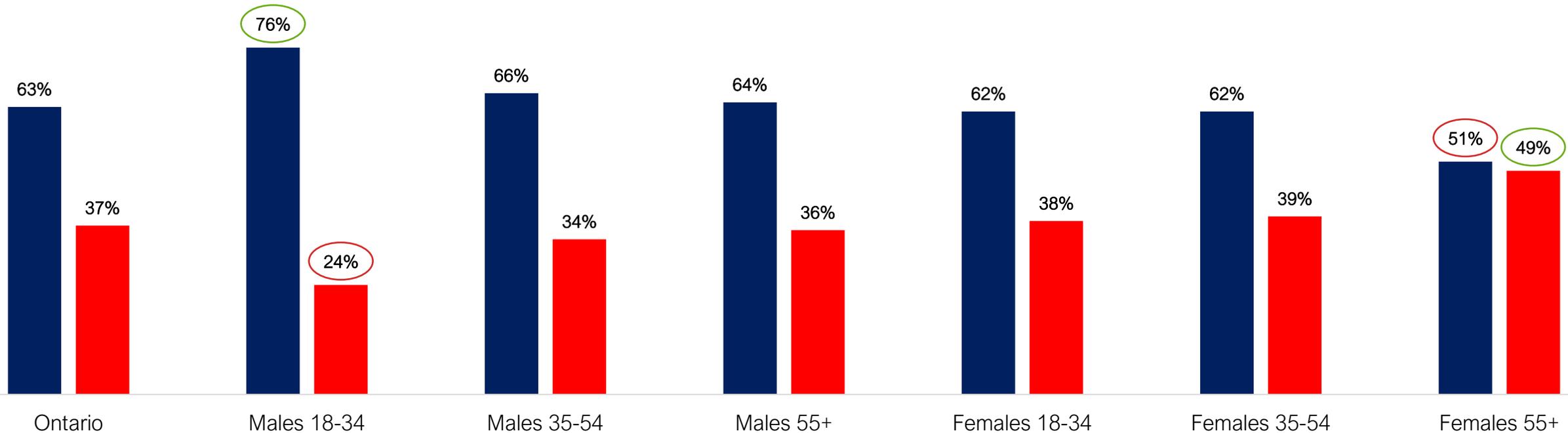


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Government Funding of Road Infrastructure

Where you live - more roads and highways (forced choice)

2 to 1, respondents chose “government needs to build more or expand more roads and more highways (where they live) over “government should stop building or expanding more roads and more highways (where they live). Only females over 55 years of age were split on this question.

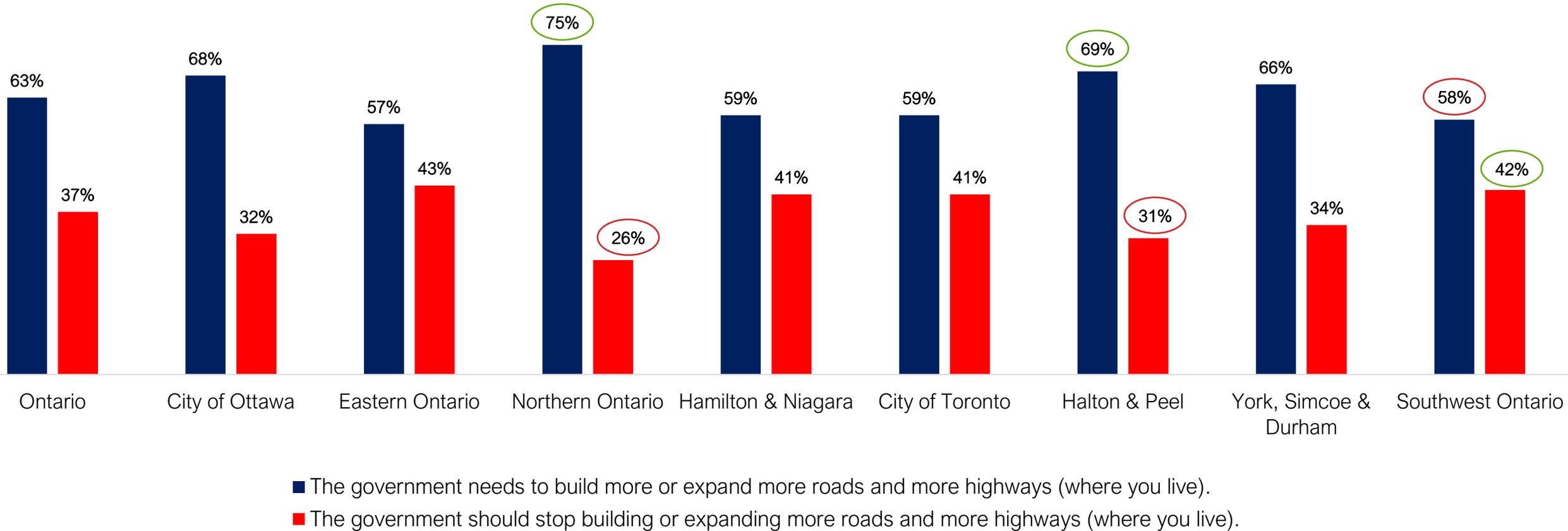


- The government needs to build more or expand more roads and more highways (where you live).
- The government should stop building or expanding more roads and more highways (where you live).

Q7 – Generally speaking, when you think about transit, transportation and moving around the city where you live , which is closer to your own view? Base = 1959

Where you live - more roads and highways (forced choice)

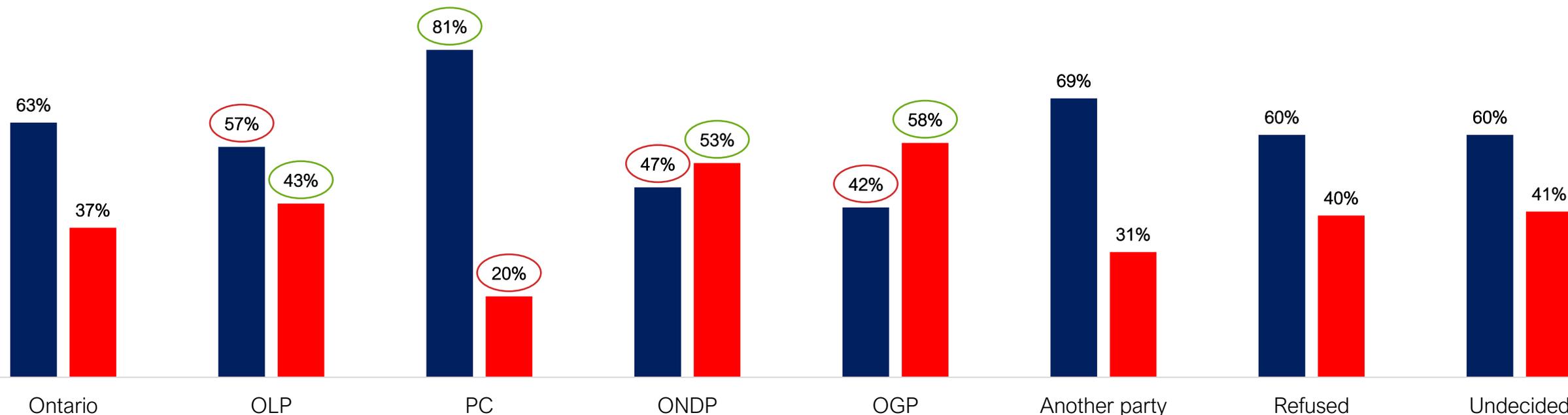
A majority of respondents chose “government needs to build more or expand more roads and more highways (where they live) over “government should stop building or expanding more roads and more highways (where they live) across all regions of Ontario.



Q7 – Generally speaking, when you think about transit, transportation and moving around the city where you live, which is closer to your own view? Base = 1959

Where you live - more roads and highways (forced choice)

A majority of respondents that support the OLP and who were “undecided” about who they would vote for (in a provincial election) chose “government needs to build more or expand more roads and more highways (where they live)” over “government should stop building or expanding more roads and more highways (where they live)”. Even ONDP and Green Party supporters were quite split on this forced choice.

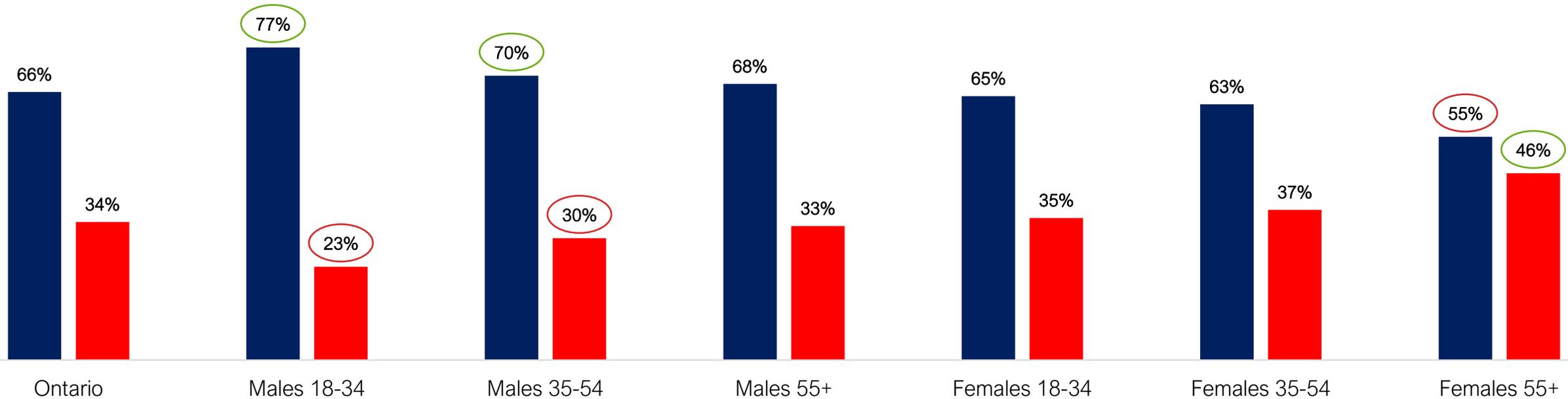


- The government needs to build more or expand more roads and more highways (where you live).
- The government should stop building or expanding more roads and more highways (where you live).

Q7 – Generally speaking, when you think about transit, transportation and moving around the city where you live, which is closer to your own view? Base = 1959

Province of Ontario - more roads and highways (forced choice)

2 to 1, respondents chose “government needs to build more or expand more roads and more highways (across the province)” over “government should stop building or expanding more roads and more highways (across the province). Females over 55 years of age were split on this question.

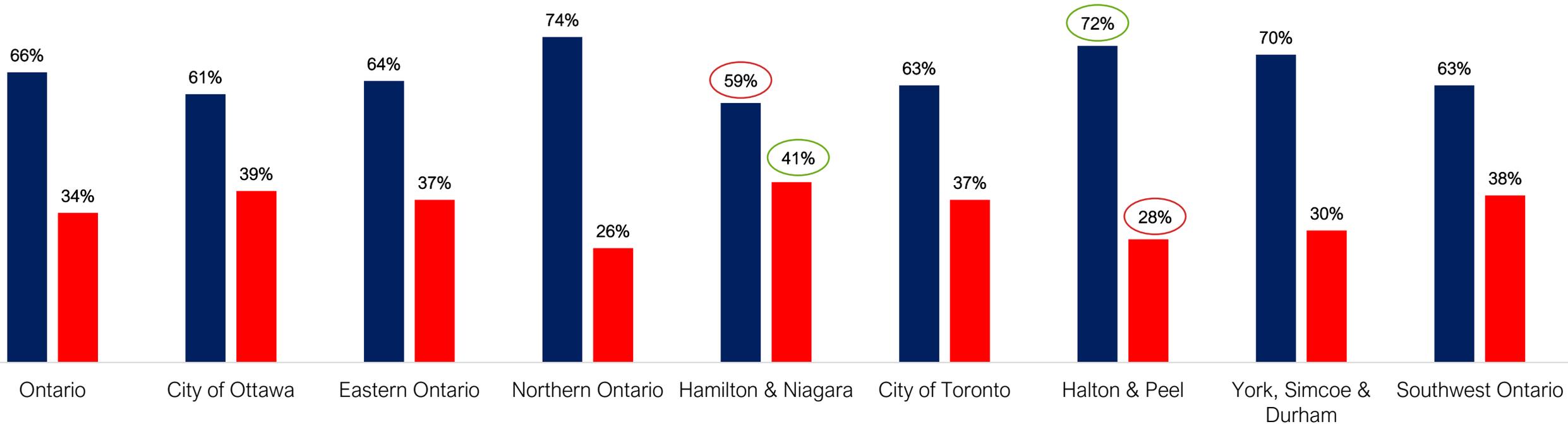


- The government needs to build more or expand more roads and more highways (across the province).
- The government should stop building or expanding more roads and more highways (across the province).

Q8 – Generally speaking, when you think about transit, transportation and moving around the province of Ontario , which is closer to your own view? Base = 1959

Province of Ontario - more roads and highways (forced choice)

A majority of respondents chose “government needs to build more or expand more roads and more highways (across the province)” over “government should stop building or expanding more roads and more highways (across the province)” in all regions of Ontario.

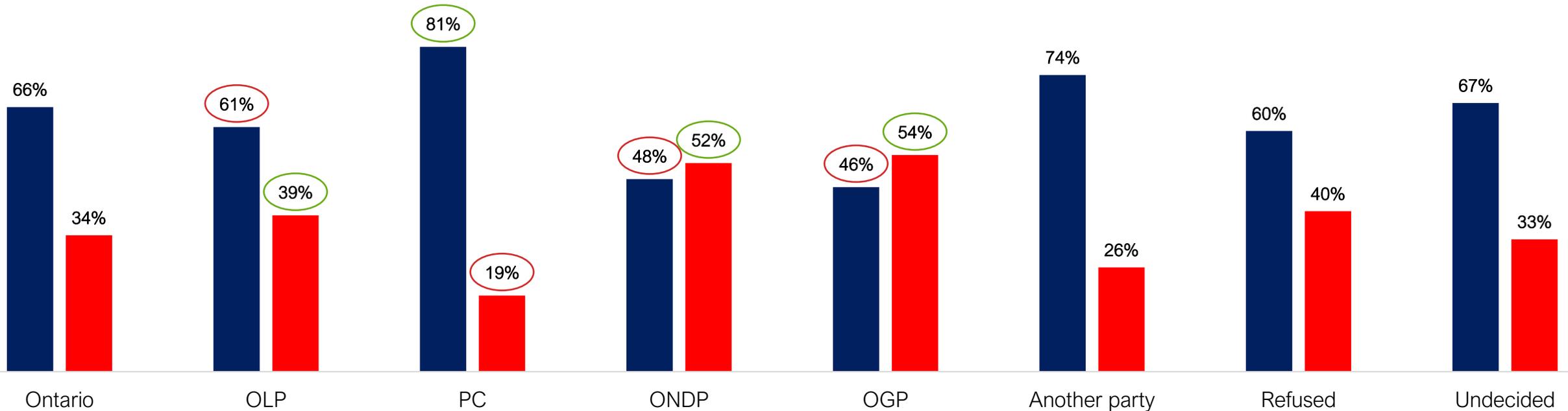


- The government needs to build more or expand more roads and more highways (across the province).
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Q8 – Generally speaking, when you think about transit, transportation and moving around the province of Ontario , which is closer to your own view? Base = 1959

Province of Ontario - more roads and highways (forced choice)

A majority of respondents that support the OLP and who were “undecided” about who they would vote for (in a provincial election) chose “government needs to build more or expand more roads and more highways (across the province)” over “government should stop building or expanding more roads and more highways (across the province)”. Even ONDP and Green Party supporters were quite split on this forced choice.



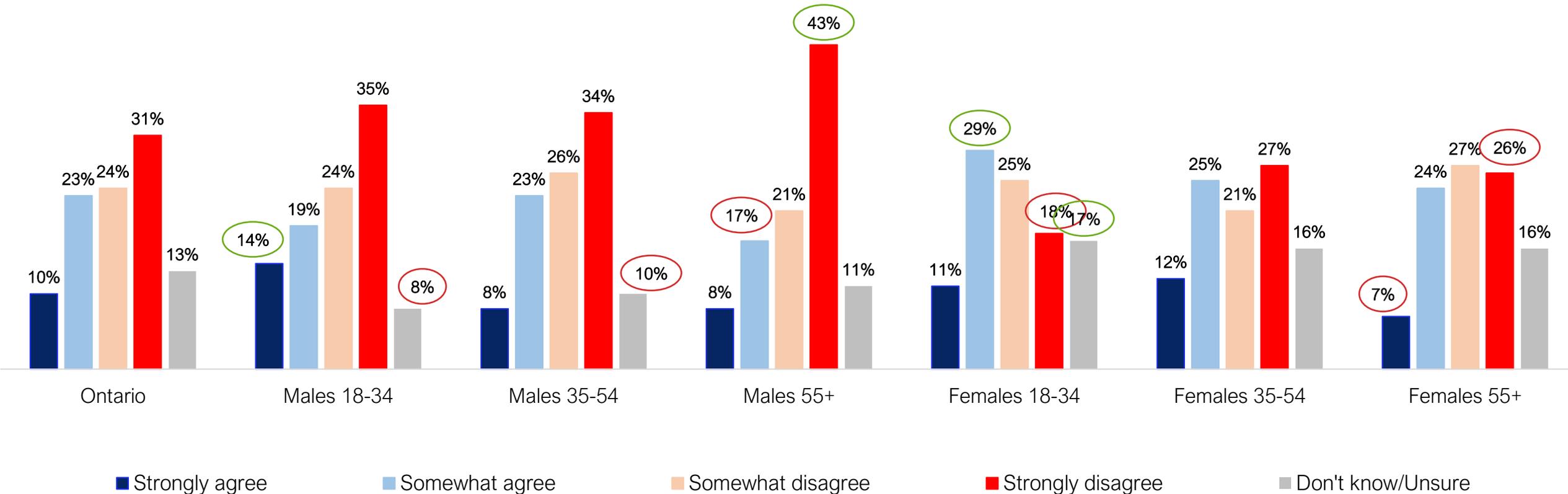
- The government needs to build more or expand more roads and more highways (across the province).
- The government should stop building or expanding more roads and more highways (across the province).

Q8 – Generally speaking, when you think about transit, transportation and moving around the province of Ontario, which is closer to your own view? Base = 1959

Agree or disagree that the federal government should STOP investing in new roads

Age and Gender

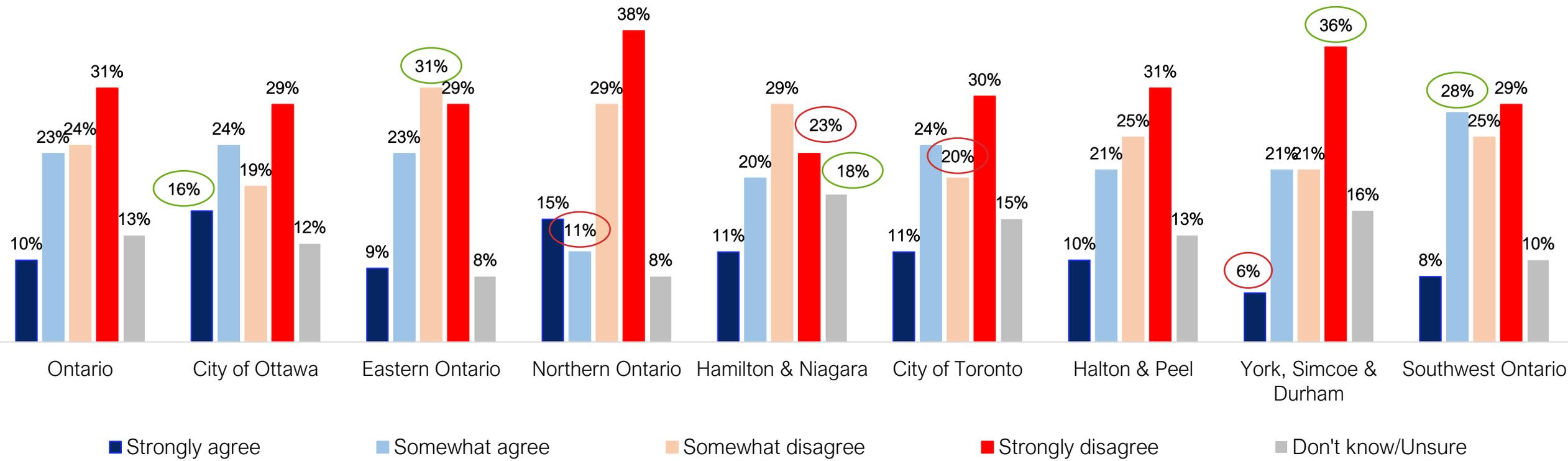
55% of respondents disagreed that the federal government should stop investing in new roads while 33% agreed. Males disagreed much more than females did, but ~50% females also disagreed.



Q9 - Canada's Environment Minister recently said that the federal government has made the decision to stop investing in new road infrastructure and that Canada's road network is perfectly adequate. Source: MPs call on Steven Guilbeault to explain no new roads comments. Do you agree or disagree that the federal government should STOP investing in new roads? Base = 1959

Agree or disagree that the federal government should STOP investing in new roads

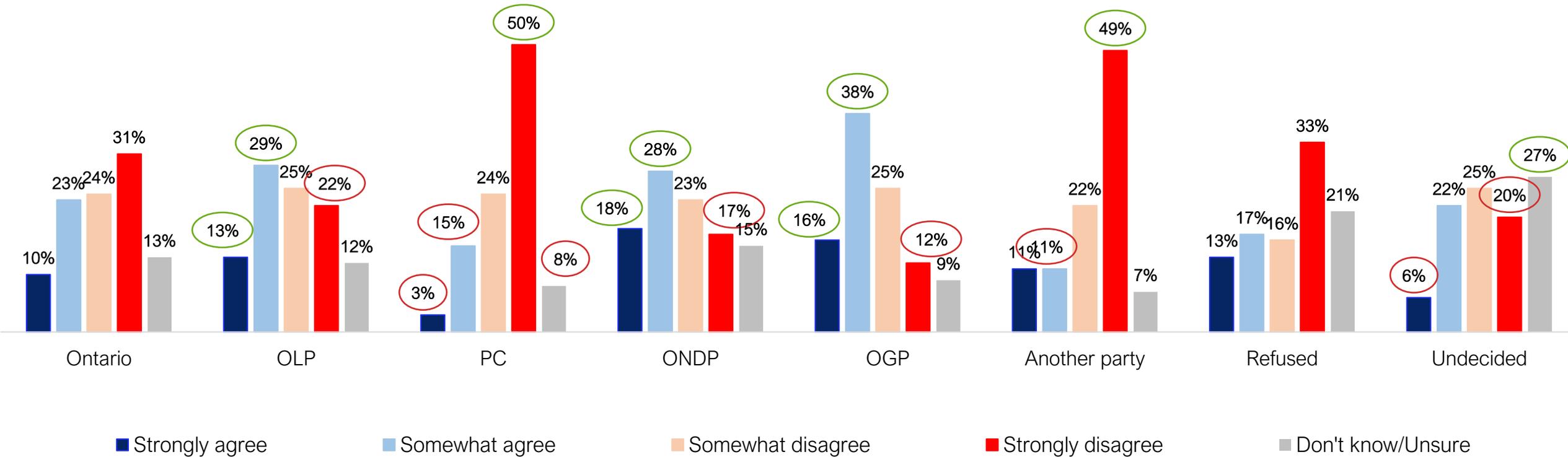
Disagreement was high across all regions of Ontario, with even half of the respondents in the City of Ottawa and Toronto also disagreeing that the feds should stop investing road infrastructure. Note the level of disagreement in Northern Ontario.



Q9 - Canada's Environment Minister recently said that the federal government has made the decision to stop investing in new road infrastructure and that Canada's road network is perfectly adequate. Source: MPs call on Steven Guilbeault to explain no new roads comments. Do you agree or disagree that the federal government should STOP investing in new roads? Base = 1959

Agree or disagree that the federal government should STOP investing in new roads

There was a significant level of disagreement with supporters across party lines.



Q9 - Canada's Environment Minister recently said that the federal government has made the decision to stop investing in new road infrastructure and that Canada's road network is perfectly adequate. Source: MPs call on Steven Guilbeault to explain no new roads comments. Do you agree or disagree that the federal government should STOP investing in new roads? Base = 1959

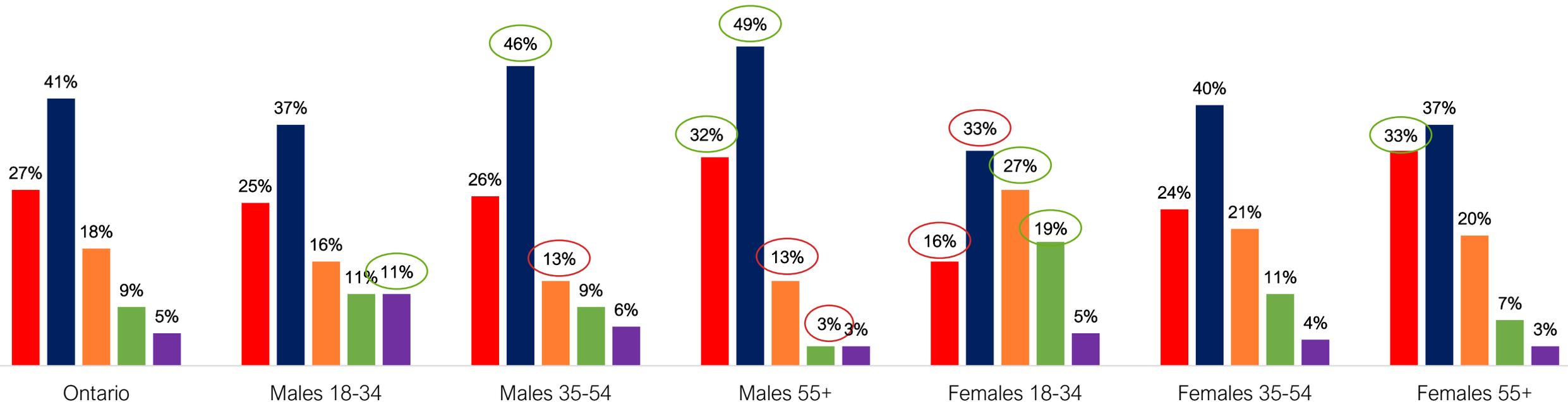
Provincial Ballot

Decided Provincial Ballot with Party name and Leader name (n=1609)

Age and Gender

41% for the PCs, same as 2022 election result. The OLP is up 3-points while the ONDP is down 4-points from the 2022 election. The Green Party is also up 3-points. The PCs perform better with males compared to females. The ONDP performs better with females compared to males. The Green Party is performing slightly better with females compared to males. The OLP is performs better with older voters compared to younger voters and is competitive with females 55 years of age and older.

As the ONDP and Green Party perform better with females, they are blunting the OLP's ability to grow with females.



- Bonnie Crombie and the Ontario Liberal Party
- Marit Stiles and the Ontario New Democratic Party
- Another party

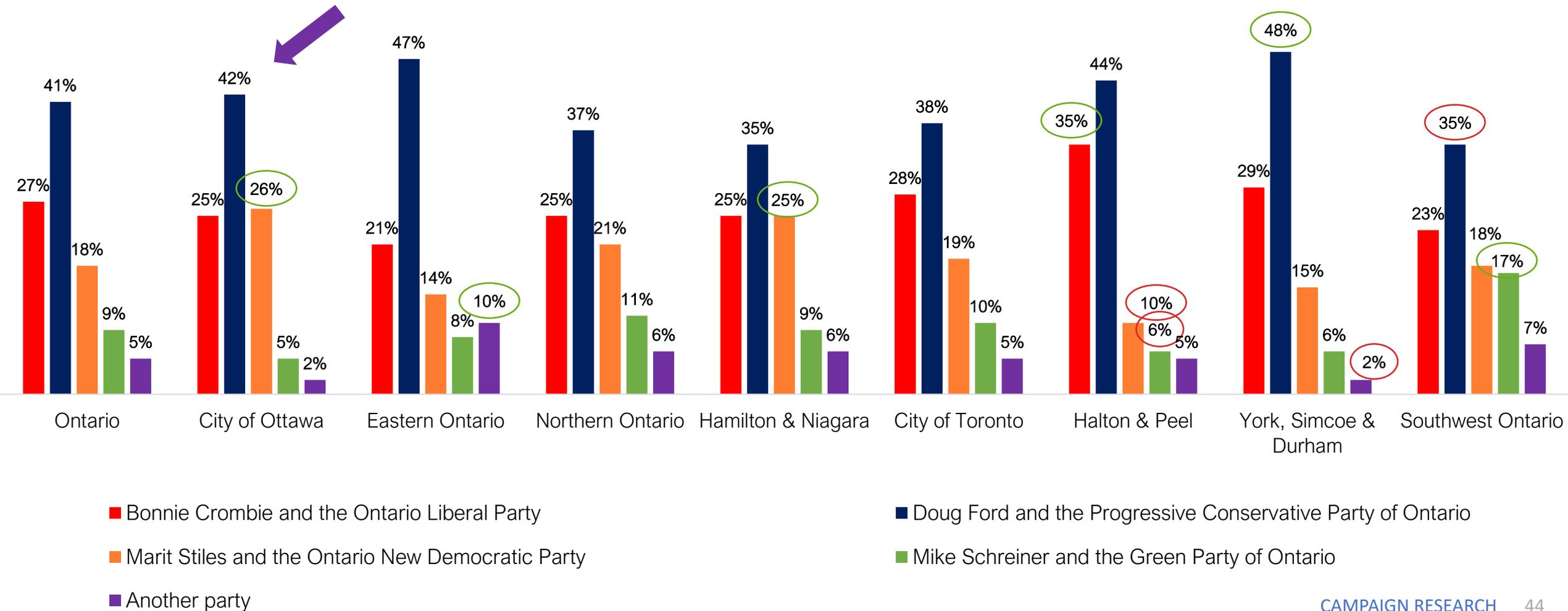
- Doug Ford and the Progressive Conservative Party of Ontario
- Mike Schreiner and the Green Party of Ontario

Decided Provincial Ballot with Party name and Leader name (n-1609)

Regions

The OLP trails the PCs across all regions of Ontario. The OLP is performing better in the Halton-Peel region (Mississauga) compared to other regions of Ontario.

Note: The Green Party performs very well in Northern and Southwestern Ontario. This support for the Green Party is blunting the OLP and the ONDP's ability to compete in these regions. ***Note the City of Ottawa region***

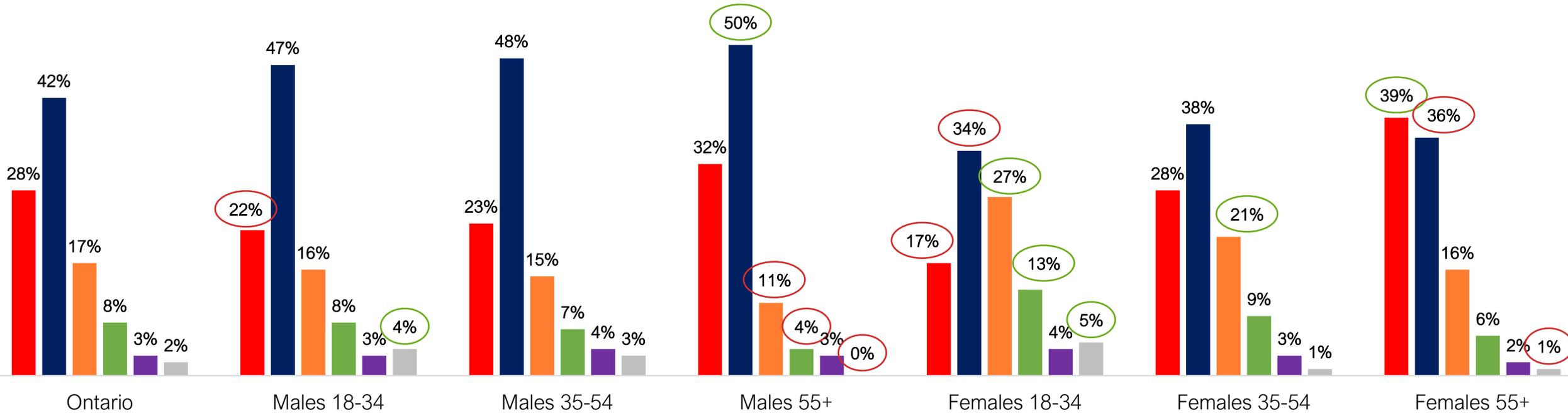


Federal Ballot

Decided Federal Ballot with Party name and Leader name (n=1649)

Age and Gender

The CPC dominates the LPC and the NDP with males and is competitive and/or leading with most women. The LPC is only competitive with females 35 years of age and older. The NDP performs better with younger voters compared to older voters. Note: In federal elections, Green Party support normally bleeds off to the LPC.



Justin Trudeau's Liberal Party of Canada

Pierre Poilievre's Conservative Party of Canada

Jagmeet Singh's New Democratic Party of Canada

Green Party of Canada

People's Party of Canada

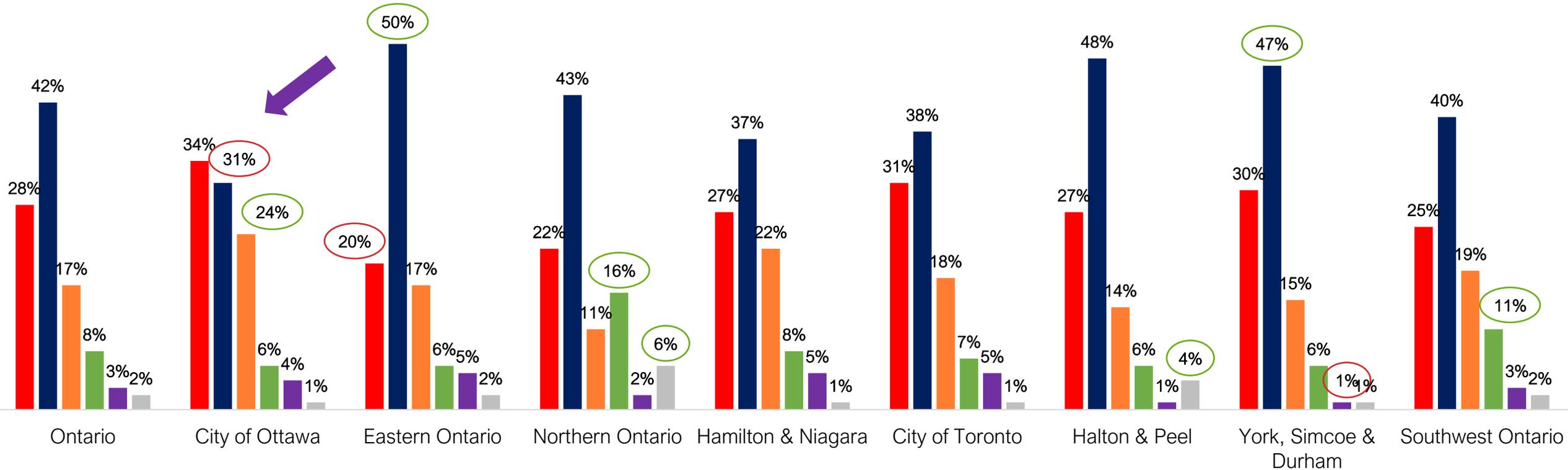
Another party

Decided Federal Ballot with Party name and Leader name (n=1649)

Regions

The LPC trails the CPC across all regions of Ontario except the City of Ottawa region. The LPC was also competitive in the City of Toronto.

Note: The Green Party performs very well in Northern and Southwestern Ontario. This support for the Green Party is blunting the LPC and the NDP's ability to compete in these regions.



Justin Trudeau's Liberal Party of Canada

Pierre Poilievre's Conservative Party of Canada

Jagmeet Singh's New Democratic Party of Canada

Green Party of Canada

People's Party of Canada

Another party