

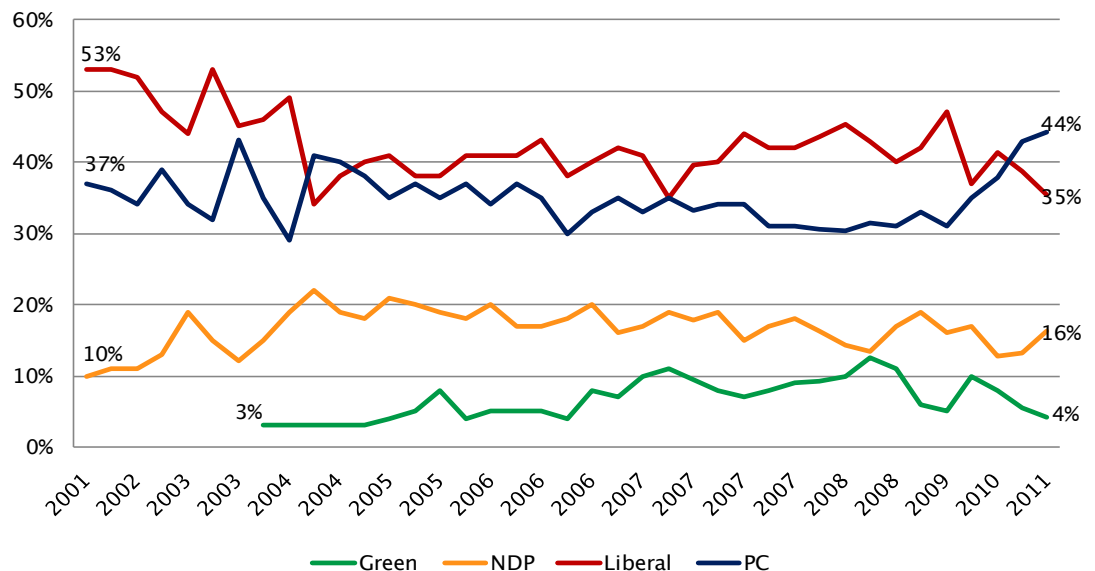
Ontario Tories 44, Liberals 35

METHODOLOGY

Between March 8th and March 11th 2011, Nanos Research conducted a random telephone survey of 504 Ontarians 18 years and older. A random telephone survey of 504 Ontarians is accurate plus or minus 4.4 percentage points, 19 times out of 20. For 451 decided voters, the survey is accurate plus or minus 4.7 percentage points, 19 times out of 20. Margins of accuracy are wider for subgroup samples. Readers should note that the data was weighted for gender and age to match the Ontarian census results. Results should be considered representative of the Ontarian population. Results may not add up to 100% due to rounding.

The research was registered with the Marketing Research and Intelligence Association of which Nanos is a Gold Seal Corporate Member.

QUESTION: For those parties you would consider voting for PROVINCIALLY, could you please rank your top two current local preferences? (Committed Voters Only – First Preference)



BALLOT 2007-2011

	2011-03	2011-02	2010-02	2009-01	2008-02	2007-01
Decided Voters (Margin of Accuracy) *	(n=451)	(n=440)	(n=413)	(n=437)	(n=438)	(n=416)
	%	%	%	%	%	%
Progressive Conservative Party	44	43	38	33	31	33
Liberal Party	35	39	41	42	44	41
NDP	16	13	13	19	16	17
Green Party	4	5	8	6	9	10
Accuracy	±4.7	±4.7	±4.9	±4.7	±4.7	±4.9

*Percentages may not add up to 100 due to rounding

Media inquiries should be directed to: Nik Nanos at nnanos@nanosresearch.com or (613) 234-4666 x237. Visit the Nanos website to sign up for instant email updates at www.nanosresearch.com.

Healthcare Remains Top Provincial Issue of Concern

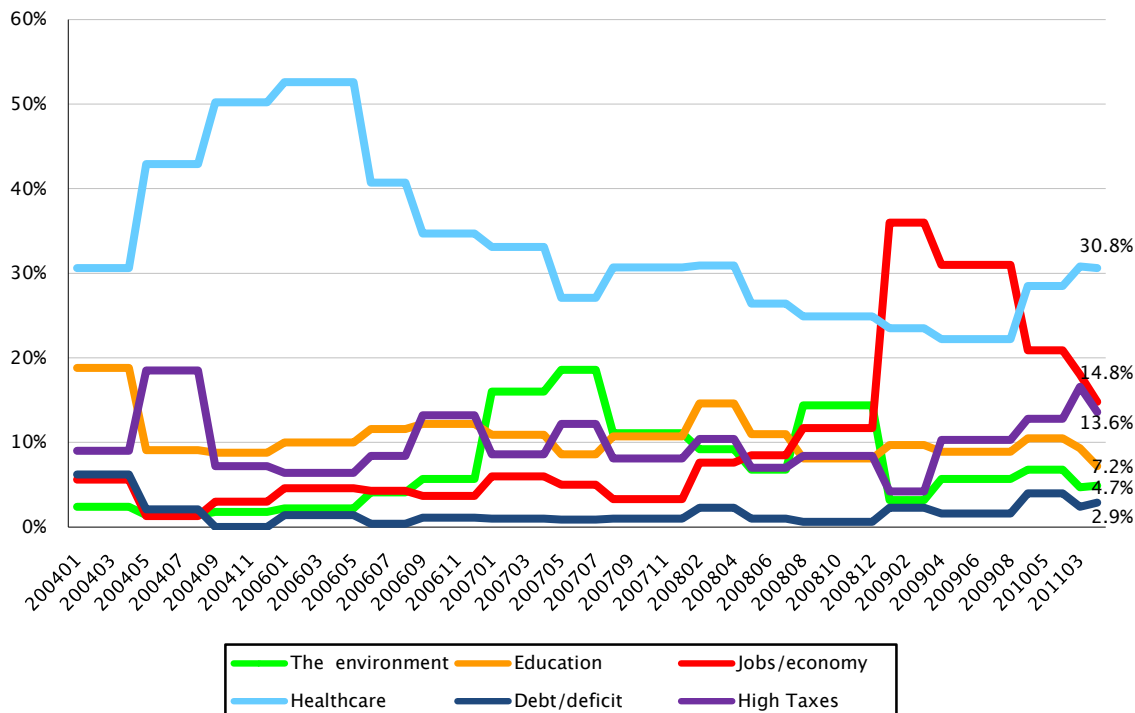
METHODOLOGY

Between March 8th and March 11th, 2011, Nanos Research conducted a random telephone survey of 504 Canadians 18 years of age and older. A random telephone survey of 504 Canadians is accurate plus or minus 4.4 percentage points, 19 times out of 20.

Results for February 2011 are from a random telephone survey of 506 Canadians conducted between February 11th and February 14th, 2011. A random telephone survey of 506 Canadians is accurate plus or minus 4.4 percentage points, 19 times out of 20.

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QUESTION: What is your most important PROVINCIAL issue of concern? [Unprompted]



TOP ISSUES

Responses (%) *	March 11 th , 2011	February 14 th , 2011	Change
	(n=504)	(n=506)	
	%	%	
Healthcare	30.6	30.8	-0.2
Jobs/economy	14.8	18.0	-3.2
High Taxes	13.6	16.6	-3.0
Education	7.2	9.3	-2.1
The environment	4.9	4.7	+0.2
Debt/deficit	2.9	2.4	+0.5
Unsure	9.3	6.7	+2.6

*Percentages may not add up to 100 due to rounding.

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Trust to Manage Issues



March 18th, 2011

Hudak Most Trusted to Manage Economic Issues

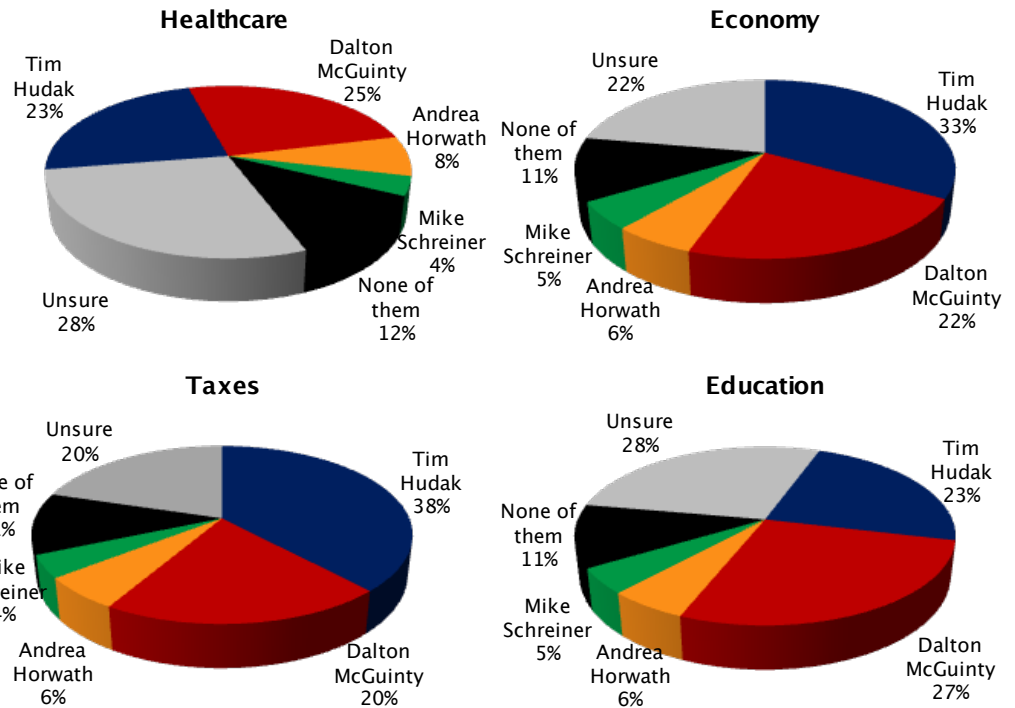
METHODOLOGY

QUESTION: Which of the PROVINCIAL party leaders do you trust the most to manage the following issues? [Rotate]

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TRUST LEADER TO MANAGE ISSUES

Leaders*	Healthcare	Economy	Taxes	Education
	%	%	%	%
Tim Hudak	23.3	33.1	38.1	23.2
Dalton McGuinty	25.4	22.3	20.4	27.4
Andrea Horwath	7.5	5.9	6.0	5.7
Mike Schreiner	3.6	5.0	4.1	4.6
None of them	11.9	11.4	11.2	11.4
Unsure	28.3	22.2	20.3	27.8

*Percentages may not add up to 100 due to rounding, and the margin of accuracy is ± 4.4 percentage points

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Government Spending in Cities



March 18th, 2011

Ontarians See More Money Going to Cities

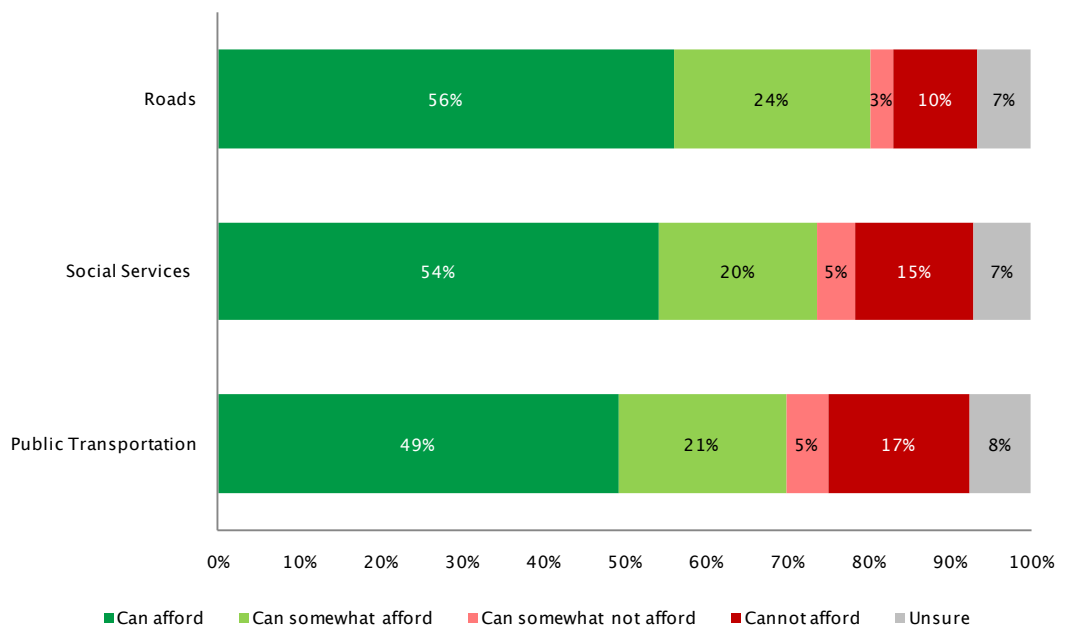
METHODOLOGY

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QUESTION: In your opinion, can the provincial government afford, somewhat afford, somewhat not afford, or not afford giving more money to Ontario cities for the following services? [ROTATE]



PROVINCIAL SPENDING IN CITIES

Ontario 2011-03*	Roads	Social Services	Public Transportation
	%	%	%
Can Afford	56.0	54.2	49.2
Can Somewhat Afford	24.2	19.5	20.6
Can Somewhat Not Afford	2.8	4.7	5.2
Cannot Afford	10.4	14.5	17.4
Unsure	6.6	7.1	7.6
Accuracy	±4.4	±4.4	±4.4

*Percentages may not add up to 100 due to rounding

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Hudak ahead of McGuinty as Best Premier

METHODOLOGY

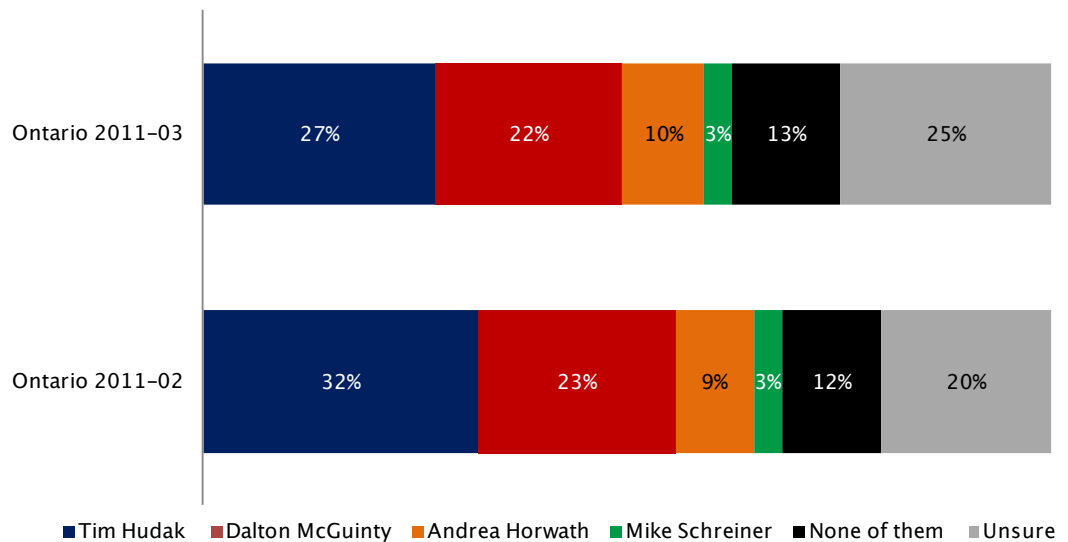
Between March 8th and March 11th 2011, Nanos Research conducted a random telephone survey of 504 Ontarians 18 years of age and older. A random telephone survey of 504 Ontarians is accurate plus or minus 4.4 percentage points, 19 times out of 20.

Results for 2011-02 are from a random telephone survey of 506 Ontarians conducted between January 31st and February 3rd, 2011.

Readers should note that the data was weighted for gender and age to match the Ontarian census results. Results should be considered representative of the Ontarian population. Results may not add up to 100% due to rounding.

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QUESTION: As you may know [ROTATE] Tim Hudak is the leader of the PCs, Dalton McGuinty is the leader of the Liberals, Andrea Horwath is the leader of the NDP and Mike Schreiner is the leader of the Green Party...who, in your opinion, would make the best Premier of Ontario?



BEST PREMIER – One Month Change

Groups*	Tim Hudak (PC)	Dalton McGuinty (LP)	Andrea Horwath (NDP)	Mike Schreiner (GP)	None of them	Unsure
	%	%	%	%	%	%
Ontario 2011-03 (±4.4)	27.3	22.1	9.7	3.3	12.7	25.0
Ontario 2011-02 (±4.4)	32.3	23.4	9.2	3.4	11.5	20.2
One Month Change	-5.0	-1.3	+0.5	-0.1	+1.2	+4.8

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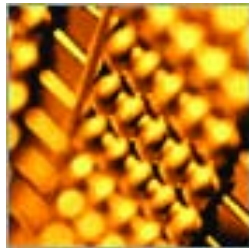
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Nanos offers a full suite of services ranging from small market research engagements through to strategic assessments and mission planning.



The Nanos Approach

At Nanos Research, we are experts at helping public-facing companies and organizations connect with the “hearts and minds” of customers or the general public. Our advantage comes from over 20 years experience in understanding the numbers and building upon them to provide strategic insight and intelligence in support of our clients’ business, marketing, public affairs and communications needs.



Getting Started

At Nanos, we believe that small steps can lead to large insights. We are regularly in the field with a national omnibus surveys. We’ll sit down with you to learn about your challenges and work on your challenge together. The results can be used to conduct a strategic assessment of your current challenge or can be the basis of a broader mission plan for you to achieve your market or mind share objectives.

The Right Solution for the Right Job

- Strategy Retainer
- Strategic Assessment
- Telephone Surveys
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- eConsultation Polling and Online Dialogue
- Focus Groups
- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



Our Record of Success

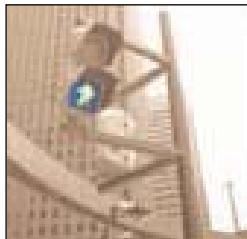
As a full-service firm, Nanos Research brings the right tools to every challenge to ensure success. The sample assignments listed below demonstrate the broad range of Nanos Research capabilities that clients have called upon.

For a national advocacy campaign, Nanos provided advice and counsel on key campaign activities as part of a monthly **strategy retainer**.



In the lead-up to a major **labour negotiation**, a multi-billion dollar corporation turned to Nanos Research to conduct research and provide advice on its corporate reputation and positioning.

Nanos Research helped chart the course for the **market expansion** of one of North America's leading retailers. Nanos Research conducted market and customer research which helped the retailer grow market share to number one in its class while expanding from 40 to 220 stores.



A global advocacy organization chose Nanos Research to **reposition a major international campaign** as part of an effort to increase support for the cause and to influence decisionmakers.

As part of a policy renewal process, a federal government department retained Nanos Research to conduct an **environmental scan** of policy initiatives around the world.

A leading industry association relied on Nanos Research to conduct research, **test creative materials** and provide advice related to its image and government initiatives which impact association members.



Nanos Research has conducted major brand research and provided expert analysis for numerous **trademark litigations**.

For a federal government department, Nanos Research developed an overarching service delivery **performance measurement** framework.

Faced with negative press, a leading advocacy organization turned to Nanos Research to conduct research among donors, members and the general populace to manage its reputation and craft a **communications campaign**.

Nanos Research is regularly commissioned to conduct public policy research and is one of the most trusted brands in collecting, measuring and understanding public opinion.



A trusted source

Our team is headed by Nik Nanos, a leader in the market and public opinion research industry recognized for the quality of his work, the insightfulness of his counsel and his professional integrity. Media organizations regularly call upon Nik Nanos and Nanos Research to capture the public pulse and analyze complex issues.

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