INNOVATIVE RESEARCH GROUP

Public Opinion Research **b**Canada This Month: Ontario Politics

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Methodology & Demographics



Methodology

- These are the findings from two Innovative Research Group (INNOVATIVE) polls conducted from January 11th to January 17th, 2018 (Wave 1), and January 26th to 29th, 2018 (Wave 2), respectively.
- The online surveys of 1,040 (W1) and 1,027 (W2) adult Ontarians were conducted on INNOVATIVE's Canada 20/20 national research panel with additional sample from Survey Sampling International, a leading provider of online sample. The Wave 1 Ontario sample is drawn from a Canada wide survey of N=2,315 conducted on the same dates.
- Both samples are weighted by age, gender, and region of the province based on the latest Statistics Canada census data. Weighted and unweighted N-sizes for each cell are provided on the following slides.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, and region characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel 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.
- 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.
- This is a representative sample. We have set targets to ensure we properly reflect key regional and demographic distribution and then used weights to ensure we reflect the country properly. However, since the online survey was not a random probability based sample, a margin of error can 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.



Wave 1 Weighting: Region, age, gender

Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported below.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	109	10.5%	137	13.7%
Males 35-54	152	14.6%	183	18.3%
Males 55+	306	29.4%	160	16.0%
Females 18-34	104	10.0%	140	14.0%
Females 35-54	141	13.6%	194	19.4%
Females 55+	228	21.9%	186	18.6%
Toronto	238	22.9%	209	20.9%
Rest of GTA	213	20.5%	253	25.3%
South/West	296	28.5%	262	26.2%
North/East	293	28.2%	276	27.6%



Wave 2 Weighting: Region, age, gender

Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported below.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	109	10.6%	138	13.8%
Males 35-54	170	16.6%	166	16.6%
Males 55+	220	21.4%	177	17.7%
Females 18-34	133	13.0%	138	13.8%
Females 35-54	179	17.4%	178	17.9%
Females 55+	216	21.0%	203	20.3%
Toronto	224	21.8%	209	20.9%
Rest of GTA	248	24.1%	260	26.0%
South/West	275	26.8%	258	25.8%
North/East	280	27.3%	273	27.3%



Political Context

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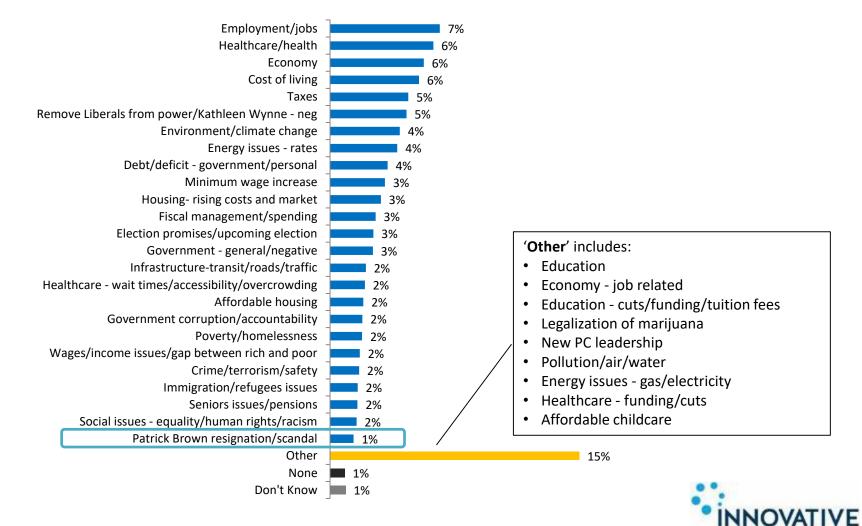


Most important problem in Ontario: "Employment/jobs" and "Healthcare/health" top the list

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What do you think is the most important problem facing the provincial government here in Ontario?

[asked of all respondents W2 n=1,000; open-ended]

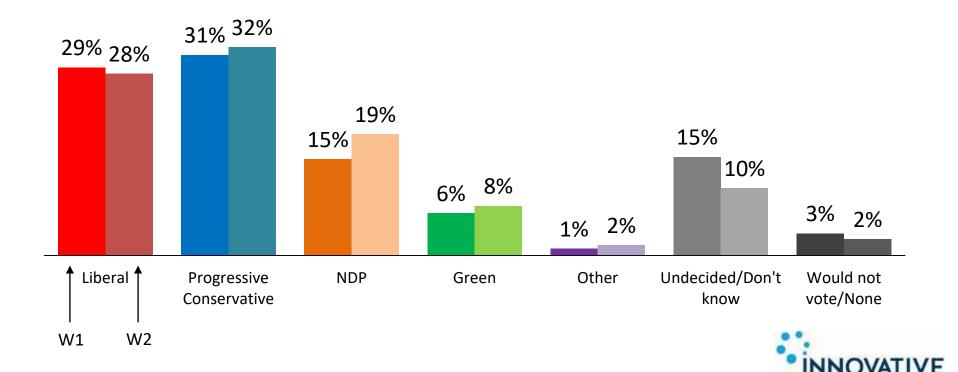


Combined Provincial Vote: Marginal increase in NCP vote, along with decrease in undecided. Libs and PC hold steady

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If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

[asked of all respondents; W1 n=1,000, W2 n=1,000]

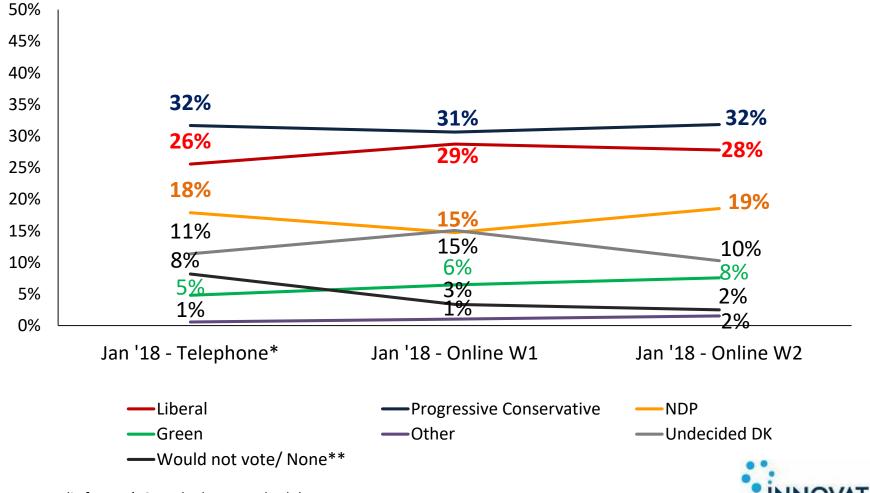


Combined Vote Phone-Online Comparison: Main party vote⁹ share relatively consistent between phone and W2 Online

If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

[Comparison with January Telephone poll, n=600 Ontario gen-pop]

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*See appendix for Jan '18 – Telephone methodology.

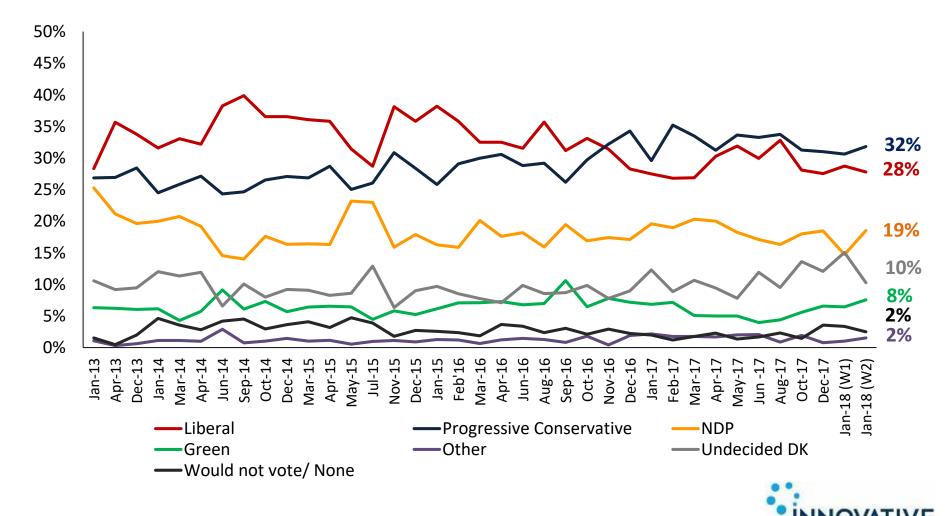
**For telephone results, this category also includes "Refused"

Combined Vote Tracking: PCs widen gap over Liberals; NDP ¹⁰ gains 4 points, while undecided drops 5 points

If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[VOTE + LEAN]**

[Tracking data since January 2013]

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Combined Vote by Region: Marginal gains for PC in Toronto. NDP gains in GTA and South/West

Combined Vote by Region

					Reg	gion			
		Torc	onto	Rest c	of GTA	South	/West	North	n/East
		W1	W2	W1	W2	W1	W2	W1	W2
	Liberal	39%	38%	31%	31%	21%	20%	27%	24%
d Vote	РС	23%	27%	34%	36%	33%	30%	32%	33%
Combined	NDP	16%	16%	10%	16%	20%	26%	13%	15%
Con	Green	5%	6%	6%	7%	8%	8%	6%	8%
	Other	2%	1%	1%	1%	1%	2%	1%	3%
Ĩ	Undecided/DK	12%	9%	15%	8%	14%	11%	18%	13%
	Would not vote/None	4%	2%	4%	2%	4%	3%	2%	3%



Combined Vote by Party ID: Decrease for PCs and Libs; increase in NDP loyalty. Unaligned shift to PC

Combined Vote by Party ID

		Party ID								
	Libe	eral		Progressive Conservative NDP		Green/Other		Unaligned		
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
Liberal	77%	71%	1%	4%	10%	8%	8%	7%	11%	17%
РС	5%	8%	91%	81%	4%	3%	30%	16%	17%	26%
NDP	6%	11%	3%	4%	79%	84%	4%	9%	11%	12%
Green	2%	4%	2%	3%	3%	2%	47%	53%	6%	8%
Other	1%	0%	0%	2%	1%	0%	4%	9%	1%	1%
Undecided/DK	7%	5%	2%	6%	2%	2%	6%	6%	44%	28%
Would not vote/None	1%	1%	0%	0%	0%	1%	0%	0%	11%	9%

Darty ID



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Combined Vote by Gender: PC vote holds steady across gender lines. Women shift from Undecided to NDP

Combined Vote by Gender

Combined Vote

	Gender							
	М	en	Women					
	W1	W2	W1	W2				
Liberal	28%	27%	30%	29%				
PC	36%	36%	26%	28%				
NDP	14%	15%	15%	21%				
Green	6%	9%	7%	7%				
Other	2%	1%	1%	2%				
Undecided/DK	11%	9%	18%	12%				
Would not vote/None	3%	4%	4%	2%				



Combined Vote by Value Cluster: Shifts between conservative and liberal feminists; increased certainty on the left

Combined Vote by Value Cluster

		Conservative-		Conservative- neutral/less feminist		Liberal- more feminist		Liberal neutral/less feminist		Left more feminist		Left neutral/less feminist	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	
Liberal	23%	31%	13%	9%	53%	46%	26%	27%	40%	35%	21%	24%	
PC	56%	48%	64%	66%	8%	16%	30%	28%	12%	13%	23%	26%	
NDP	6%	6%	6%	9%	18%	18%	15%	15%	24%	35%	16%	24%	
Green	5%	8%	2%	4%	8%	8%	6%	10%	8%	7%	8%	7%	
Other	2%	0%	2%	2%	0%	1%	1%	2%	1%	1%	1%	2%	
Undecided/DK	6%	6%	11%	8%	11%	10%	21%	16%	12%	7%	22%	12%	
Would not vote/None	1%	1%	2%	3%	2%	1%	2%	2%	2%	2%	9%	6%	

Value Cluster



Combined Vote

Combined Vote by TfC/Alienation Segment: Uncertain are ¹⁵ leaning towards a PC vote

	Conservative	Core/Soft Liberal	Time-for- Change Liberal	NDP	Uncertain
Liberal	3%	85%	53%	4%	12%
PC	67%	2%	14%	22%	33%
NDP	13%	7%	18%	52%	11%
Green	7%	1%	11%	11%	10%
Other	1%	1%	1%	3%	1%
Would not vote	7%	3%	3%	8%	26%
Undecided/DK	1%	1%		2%	8%

TfC/Alienation Segments

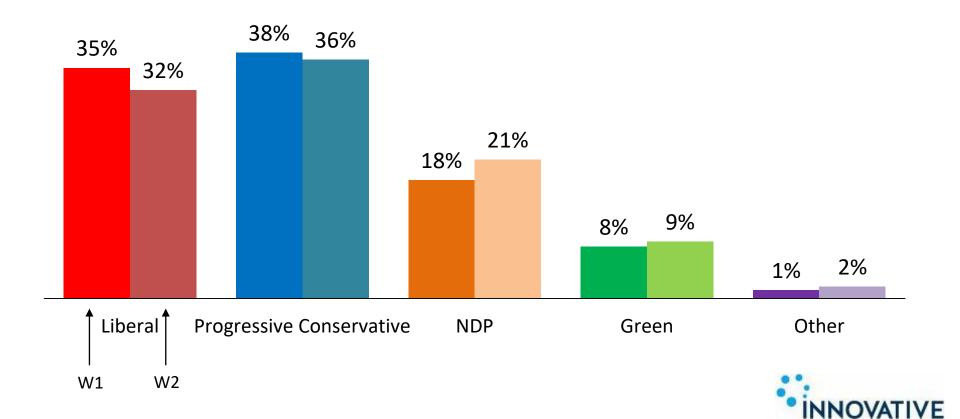


Decided Provincial Vote: Suggestions of a shift toward the left



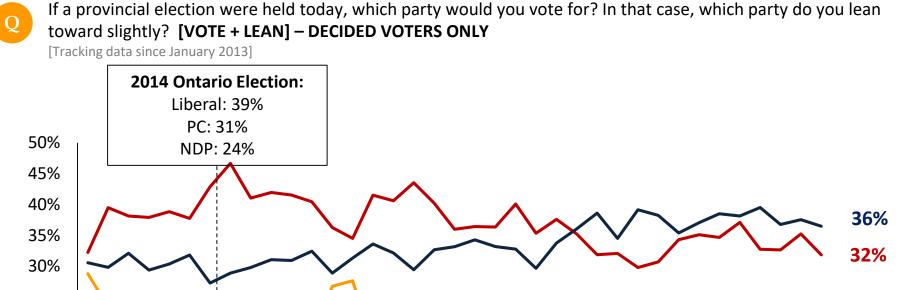
If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[VOTE + LEAN] – DECIDED VOTERS ONLY**

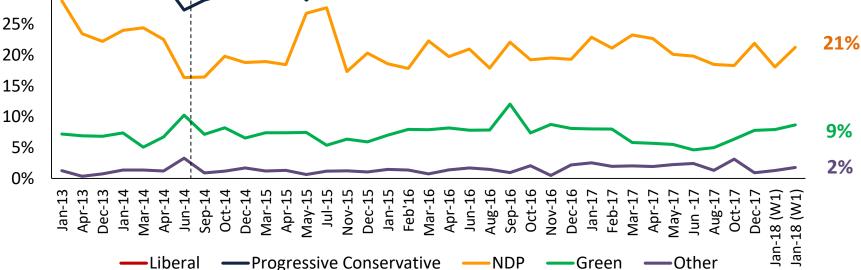
[decided voters; W1 n=816, W2 n=872]



Decided Vote Tracking: Marginal downward shift for PCs and¹⁷

Liberals, with marginal gains for NDP





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Second Choice by Combined Vote: Drop in undecided across¹⁸ the board. NDP increases as 2nd choice party for PC voters



And which party would be your second choice? [BY FIRST CHOICE]

[asked of all respondents who have a vote choice; W1 n=816, W2 n=873]

	Ove	erall	Libo	Liberal		PC		NDP		Green/Other	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2	
Liberal	11%	12%			11%	8%	31%	34%	19%	22%	
РС	7%	11%	9%	18%			16%	16%	8%	18%	
NDP	21%	24%	36%	35%	17%	29%			19%	26%	
Green	12%	12%	13%	13%	9%	8%	21%	22%	0%	0%	
Other	2%	1%	1%	1%	3%	2%	1%	1%	2%	2%	
Undecided/DK	32%	26%	31%	26%	34%	31%	24%	20%	41%	24%	
Would not vote	16%	14%	11%	8%	26%	24%	7%	7%	11%	8%	

Combined Vote (First Choice)

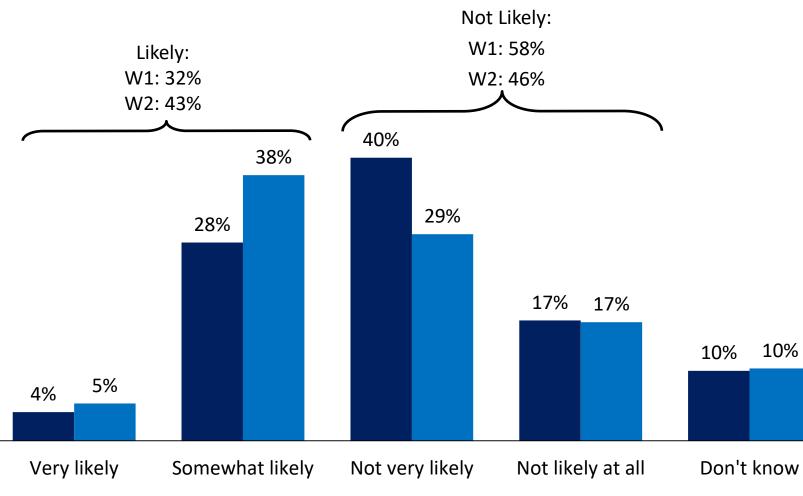


Second Choice

Likely to Change to 2nd Choice: 11 point increase in likelihood to switch to 2nd choice

How likely is it you may change your mind and vote for your second choice?

[asked only of respondents who had a second choice, W1 n=425, W2 n=527]



■W1 ■W2

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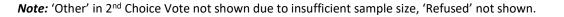
Likelihood to Switch by 2nd Choice: Across the board increase in likelihood to switch



How likely is it you may change your mind and vote for your second choice? **BY** And which party would be your second choice?

[asked only of respondents who have a 2nd choice, W1 n=425, W2 n=527]

	PC 2 nd choice		Liberal 2	Liberal 2 nd choice		^d choice	Green 2 nd choice	
	W1	W2	W1	W2	W1	W2	W1	W2
Very likely	7%	6%	2%	7%	3%	3%	5%	7%
Somewhat likely	25%	42%	39%	46%	31%	36%	23%	32%
Not very likely	37%	31%	33%	23%	44%	33%	43%	27%
Not likely at all	15%	7%	9%	9%	16%	19%	21%	26%
Don't know	16%	14%	17%	14%	6%	8%	8%	9%
TOTAL LIKELY	32%	48%	41%	54%	34%	40%	28%	39%





"Would Never Vote For" by Combined Vote: More than

half of PC voters would never vote Liberal



Would Never Vote

Is there any party you would never vote for? [BY FIRST CHOICE]

[asked of all respondents; W2 only n=1,000]

	Overall	Liberal	РС	NDP	Green/ Other	Unaligned
Liberal	26%		53%	32%	26%	9%
PC	20%	36%		37%	25%	7%
NDP	9%	9%	13%		11%	8%
Green	14%	20%	16%	8%		13%
Other	3%	3%	2%	2%	8%	2%
Undecided/DK	22%	25%	12%	16%	25%	46%
Would not vote	7%	7%	4%	6%	5%	16%

Combined Vote (First Choice)



"Would Never Vote For" by Party ID: Half of PC partisans

would never vote Liberal, plurality of Libs & NDP spurn PCs



Would Never Vote

Is there any party you would never vote for? [BY PARTY ID]

[asked of all respondents; W2 only n=1,000]

	Overall	Liberal	РС	NDP	Green/ Other	Unaligned
Liberal	26%	4%	51%	32%	35%	20%
РС	20%	36%	0%	43%	23%	8%
NDP	9%	10%	14%	0%	9%	7%
Green	14%	18%	17%	7%	3%	11%
Other	3%	3%	2%	2%	7%	1%
Undecided/DK	22%	22%	12%	15%	17%	38%
Would not vote	7%	7%	4%	2%	6%	14%

Party ID



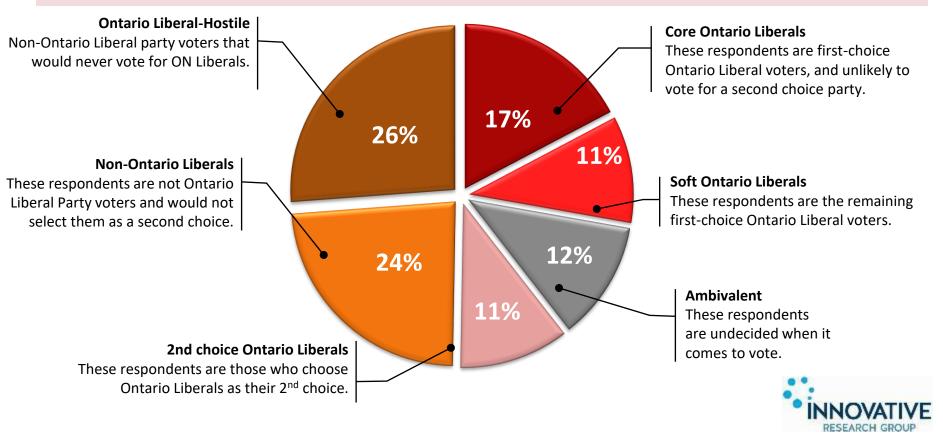
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Ontario Liberals Voter Pool: 17% are core Ontario Liberals, <u>one-in-four (26%) would never vote for the party</u>

We have created a segmentation that groups individuals based on their level of **Ontario Liberal Party** support.

The following chart illustrates six unique groups among respondents of this survey based on their responses to a combined provincial vote question, their second choice party, their likelihood to vote for their second choice and if they would never vote Ontario Liberal.

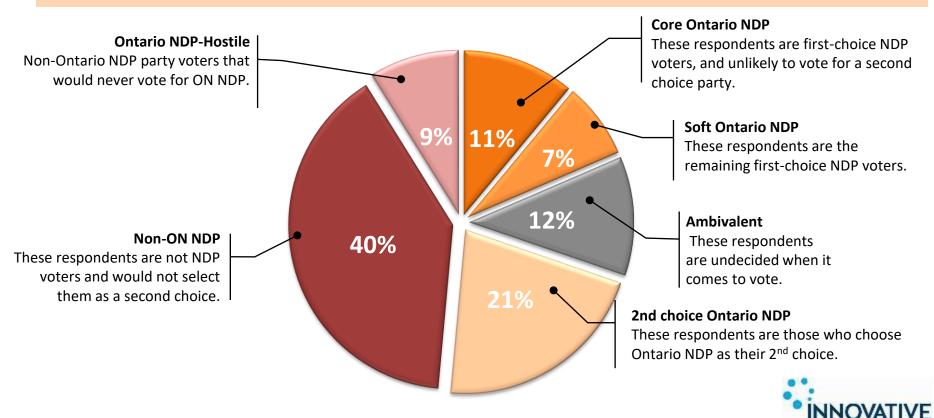
For crosstab analyses, Soft/Ambivalent/2nd choice are combined as "Battleground ON Liberals".



Ontario NDP Voter Pool: only 11% base, but large 2nd choice ²⁴ NDP for opposition to draw on

We have created a segmentation that groups individuals based on their level of **Ontario NDP** support.

The following chart illustrates six unique groups among respondents of this survey based on their responses to a combined provincial vote question, their second choice party, their likelihood to vote for their second choice, and if they would never vote Ontario NDP.



For crosstab analyses, Soft/Ambivalent/2nd choice are combined as "Battleground NDP".

Ontario PC Voter Pool: 1-in-4 (26%) are core PC, 2-in-10 (20%) would never vote PC

We have created a segmentation that groups individuals based on their level of **Ontario PC Party** support.

The following chart illustrates six unique groups among respondents of this survey based on their responses to a combined provincial vote question, their second choice party, their likelihood to vote for their second choice and if they would never vote for the PCs.

Core Ontario PCs Ontario PC-Hostile These respondents are first-choice PC voters, and Non-Ontario PC party voters that unlikely to vote for a second choice party. would never vote for ON PC. 26% 20% Soft Ontario PCs Non-PCs These respondents are the remaining These respondents are not PC Party first-choice Ontario PC voters. voters and would not select 6% them as a second choice. 27% Ambivalent 12% These respondents are undecided when it 2nd choice Ontario PCs 10% comes to vote. These respondents are those who choose Ontario PCs as their 2nd choice.

For crosstab analyses, Soft/Ambivalent/2nd choice are combined as "Battleground PCs".

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Appendix: Telephone Methodology



Telephone Methodology

- For the January 2018 telephone results from slide 26, the survey was conducted by telephone among 670 randomly-selected Ontario residents, 18 years of age and older, from January 10th to January 16th, 2018.
- Only one respondent per household was eligible to complete this survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented. Numbers are dialed from RDD telephone sample. A maximum of 8 call backs are attempted for each record.
- The sample has been weighted (n=600) by age, gender and region using the latest available. Census data to reflect the actual demographic composition of the population.
- The margin of error for a sample of n=600 is approximately <u>+</u>4.0%, 19 times out of 20.
- The vote intention questions reported here come at the beginning of the survey, preceded only by screening questions and questions asking whether the province is on the right or wrong track, how respondents feel about the economy, and what they believe is the most important issue facing the province.
- Screening questions are used to ensure respondents do not work in the market research, media, or advertising industries; and for cell phone respondents to ensure they are not driving at the time of the call.

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.



Telephone Weighting: Region, age, gender

Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data. Weighted and unweighted frequencies are reported below.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	86	12.8%	83	13.8%
Males 35-54	110	16.4%	1100	16.6%
Males 55+	150	22.4%	106	17.7%
Females 18-34	54	8.1%	83	13.8%
Females 35-54	110	16.4%	107	17.9%
Females 55+	160	23.9%	122	20.3%
Toronto	123	18.4%	125	20.9%
Rest of GTA	150	22.4%	156	26.0%
South/West	161	24.0%	155	25.8%
North/East	236	35.2%	164	27.3%





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