Public Opinion Research ▶▶

Canada This Month: Ontario Politics

PC Leadership, Vote Impact, Vote Switching & Values

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 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 province 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.*

INNOVATIVE
RESEARCH GROUP

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%

INNOVATIVE
RESEARCH GROUP

PC Party Leadership

Leadership Candidates: Elliott most favourable, Ford least favourable. Interim leader Fedeli third-most favourable

Q The Ontario PC Party now has to select a new leader. Below are the names of several individuals who have been mentioned in the news as possible candidates for the leader of the PCs. For each one, please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you haven't heard of them, just say so.

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

Net Favorable

Candidate	Strongly favourable	Somewhat favourable	Neither favorable nor unfavourable	Somewhat unfavourable	Strongly Unfavourable	Have not heard of them	Don't know	Net Favorable
Christine Elliott	11%	20%	20%	3%	2%	25%	20%	26%
Lisa Raitt	9%	16%	20%	6%	6%	24%	19%	14%
Vic Fedeli	8%	12%	21%	4%	2%	30%	22%	13%
Lisa MacLeod	5%	15%	23%	6%	4%	26%	21%	11%
Caroline Mulroney	7%	15%	27%	6%	6%	20%	19%	9%
John Baird	8%	12%	22%	6%	10%	23%	18%	5%
Rod Phillips	3%	4%	19%	3%	2%	43%	27%	3%
Denzil Minnan-Wong	4%	8%	20%	7%	7%	32%	23%	-2%
Doug Ford	9%	10%	17%	13%	32%	10%	11%	-26%

- ■ Strongly favourable
- ■ Somewhat favourable
- ■ Neither favorable nor unfavourable
- ■ Somewhat unfavourable
- ■ Strongly Unfavourable
- ■ Have not heard of them
- ■ Don't know

Start

Leadership Candidates: 1-in-4 include Elliott in their top three. Ford, Fedeli and Mulroney are tied at 16%

Q Which of these potential candidates for leader of the Ontario PC party would be your [first/second/third] choice?
[asked of all respondents; n=1,000]

	First Choice	Second Choice	Third Choice	Total consideration set
Christine Elliott	14%	6%	5%	24%
Doug Ford	10%	4%	2%	16%
Vic Fedeli	7%	5%	4%	16%
Caroline Mulroney	6%	6%	3%	16%
Lisa Raitt	6%	6%	3%	15%
John Baird	5%	4%	3%	13%
Lisa MacLeod	3%	4%	4%	11%
Denzil Minnan-Wong	2%	3%	2%	7%
Rod Phillips	1%	1%	1%	4%

■ First Choice ■ Second Choice ■ Third Choice
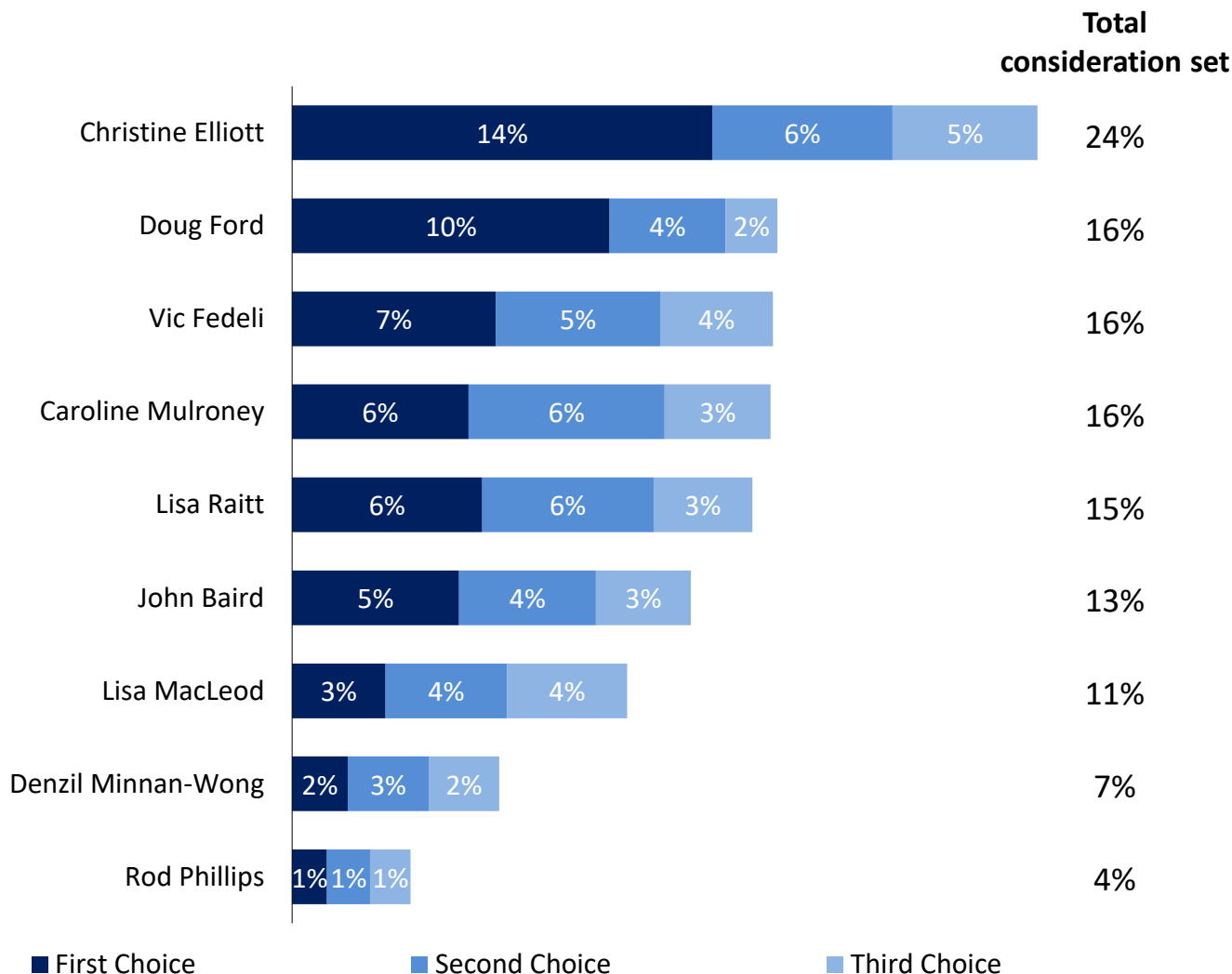
Leadership Candidates: Among core PC, Elliott (35%) holds 9 pt lead over Fedeli; among Battleground, the field widens

Q Which of these potential candidates for leader of the Ontario PC party would be your first choice? Which of these...second choice? Third choice?

[all percentages are based on all respondents]

Core PC

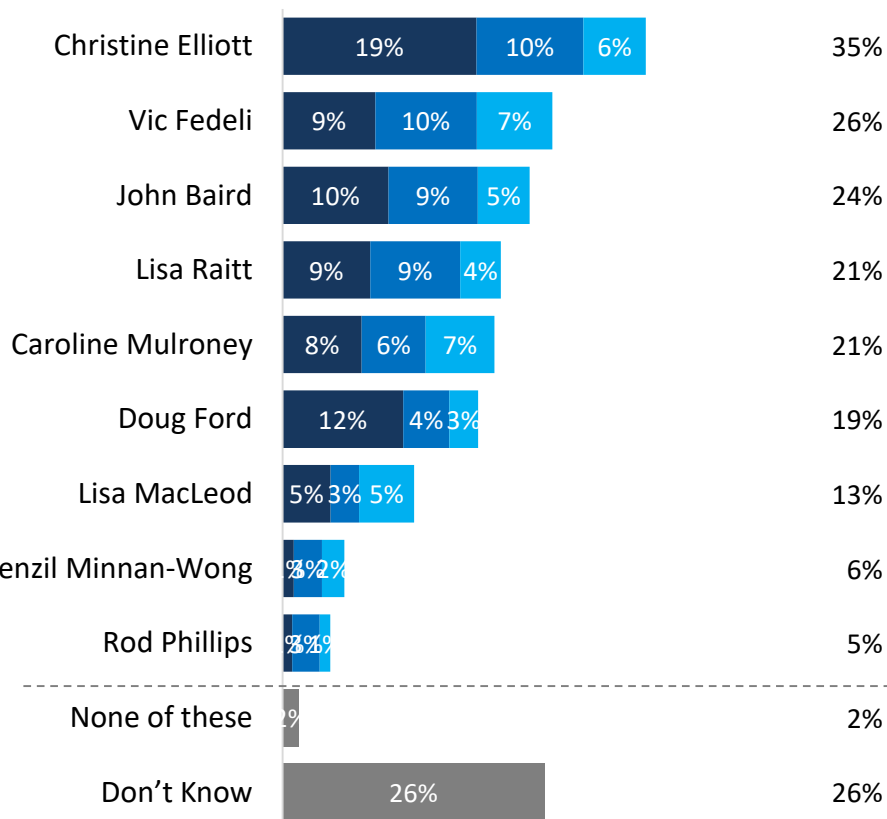| Candidate	First Choice	Second Choice	Third Choice	Total
Christine Elliott	19%	10%	6%	35%
Vic Fedeli	9%	10%	7%	26%
John Baird	10%	9%	5%	24%
Lisa Raitt	9%	9%	4%	21%
Caroline Mulroney	8%	6%	7%	21%
Doug Ford	12%	4%	3%	19%
Lisa MacLeod	5%	3%	5%	13%
Denzil Minnan-Wong	2%	2%	2%	6%
Rod Phillips	2%	2%		5%
None of these	2%			2%
Don't Know	26%			26%

Battleground PC
(Soft, Ambivalent, 2ⁿᵈ choice)

Candidate	First Choice	Second Choice	Third Choice	Total
Doug Ford	12%	4%	1%	17%
Christine Elliott	8%	3%	4%	15%
Vic Fedeli	6%	4%	3%	12%
John Baird	4%	5%	2%	11%
Caroline Mulroney	4%	4%	3%	11%
Lisa Raitt	3%	3%	2%	8%
Lisa MacLeod	2%	4%	3%	8%
Denzil Minnan-Wong	2%	3%	2%	6%
Rod Phillips	1%	1%	1%	3%
None of these	15%			15%
Don't Know	44%			44%
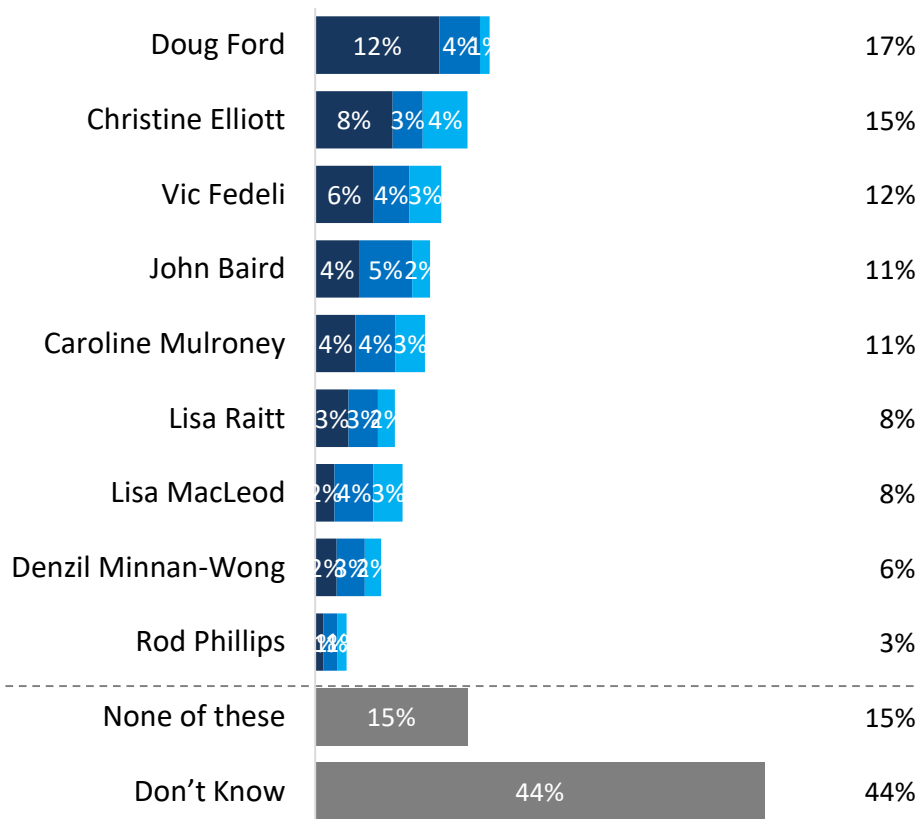
■ First Choice ■ Second Choice ■ Third Choice

First Choice by Populism Cluster: Elliott edges out Ford among most; tied among Deferential Cons. & Thrifty Moderates

Populism Cluster

PC leadership preference (First Choice) BY Populism Cluster

- ■ Deferential Conservatives
- ■ Populist Conservatives
- ■ Business Liberals
- ■ Left Liberals
- ■ Thrify Moderates
- ■ Core Left

11%
16%
21%
16%
17%
20%

										None	Don't know
Deferential Conservatives	14%	14%	10%	7%	4%	9%	2% 1% 1%			6%	32%
Populist Conservatives	19%	14%	10%	7%	10%	10%	2% 2% 2%			5%	22%
Business Liberals	12%	9%	5%	6%	3%	8%	6%	3% 1%		10%	37%
Left Liberals	14%	8%	2%	6%	6%	4%	2% 1% 2%			16%	39%
Thrify Moderates	10%	10%	9%	6%	8%	1% 3% 1% 2%				12%	39%
Core Left	14%	10%	6%	7%	5%	2% 3% 2%				18%	32%

- ■ Elliott
- ■ Ford
- ■ Fedeli
- ■ Raitt
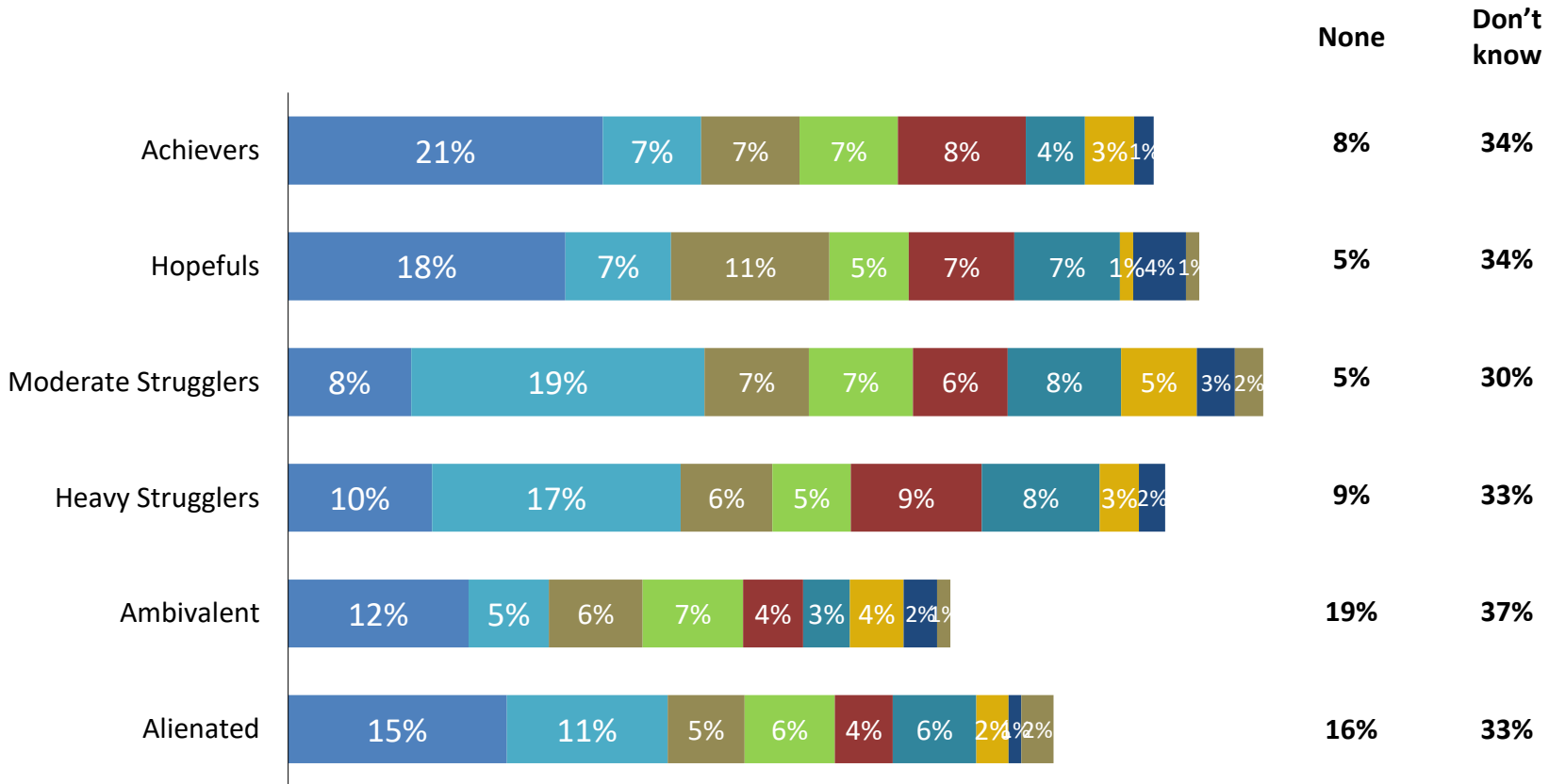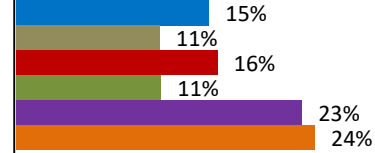- ■ Mulroney
- ■ Baird
- ■ MacLeod
- ■ Minnan-Wong
- ■ Phillips

First Choice by Economic Alienation: Most prefer Elliott, but Ford 1st choice in both Struggler segments

Economic Alienation Segments

PC leadership preference (First Choice) BY Economic Alienation Segment

■ Achievers ■ Hopefuls ■ Moderate Strugglers ■ Heavy Strugglers ■ Ambivalent ■ Alienated

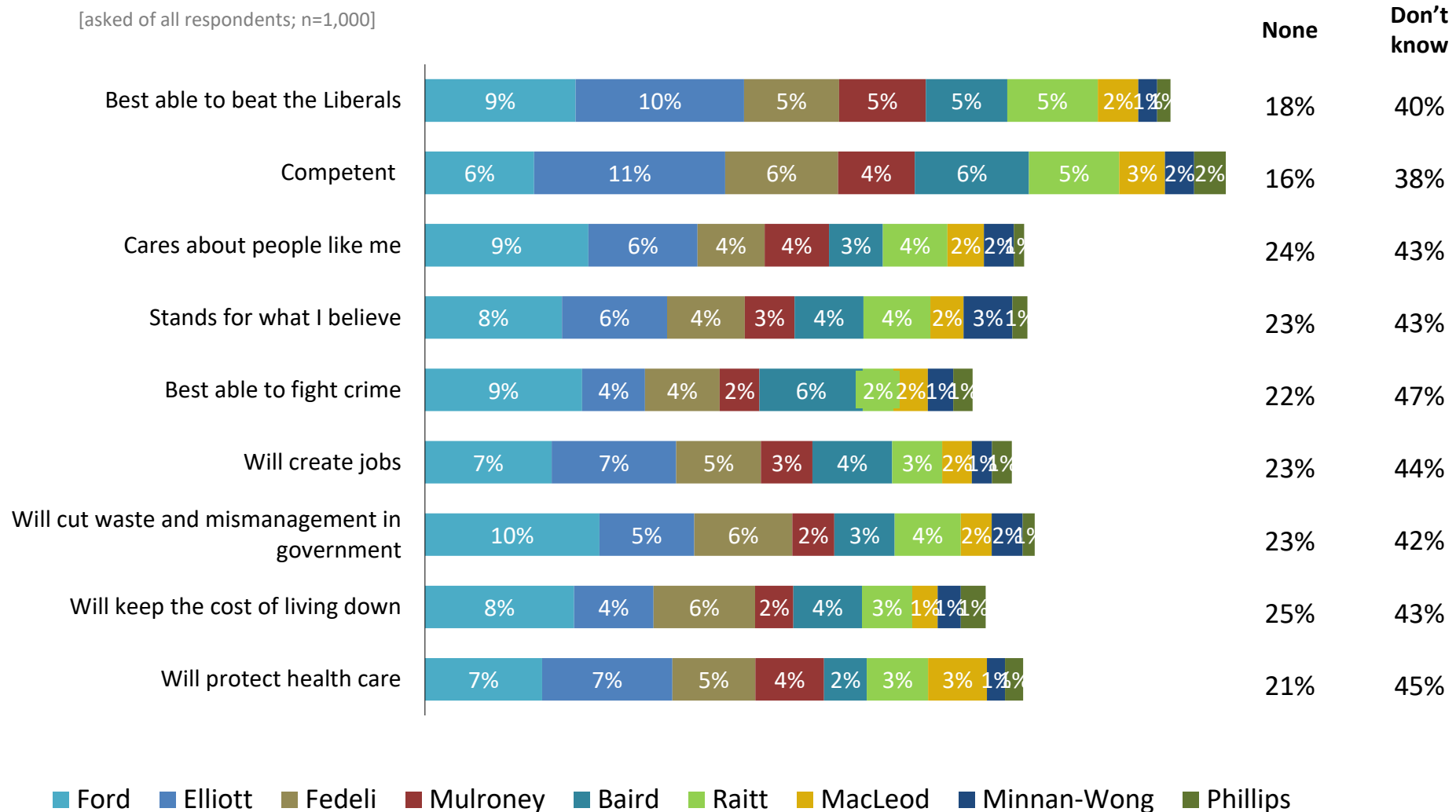| Segment	Values	None	Don't know
Achievers	21% 7% 7% 7% 8% 4% 3% 1%	8%	34%
Hopefuls	18% 7% 11% 5% 7% 7% 1% 4% 1%	5%	34%
Moderate Strugglers	8% 19% 7% 7% 6% 8% 5% 3% 2%	5%	30%
Heavy Strugglers	10% 17% 6% 5% 9% 8% 3% 2%	9%	33%
Ambivalent	12% 5% 6% 7% 4% 3% 4% 2% 1%	19%	37%
Alienated	15% 11% 5% 6% 4% 6% 2% 1% 2%	16%	33%

■ Elliott ■ Ford ■ Fedeli ■ Raitt ■ Mulroney ■ Baird ■ MacLeod ■ Minnan-Wong ■ Phillips

Leader Attributes: Ford edges out Elliott on several measures; Fedeli ranks third on most
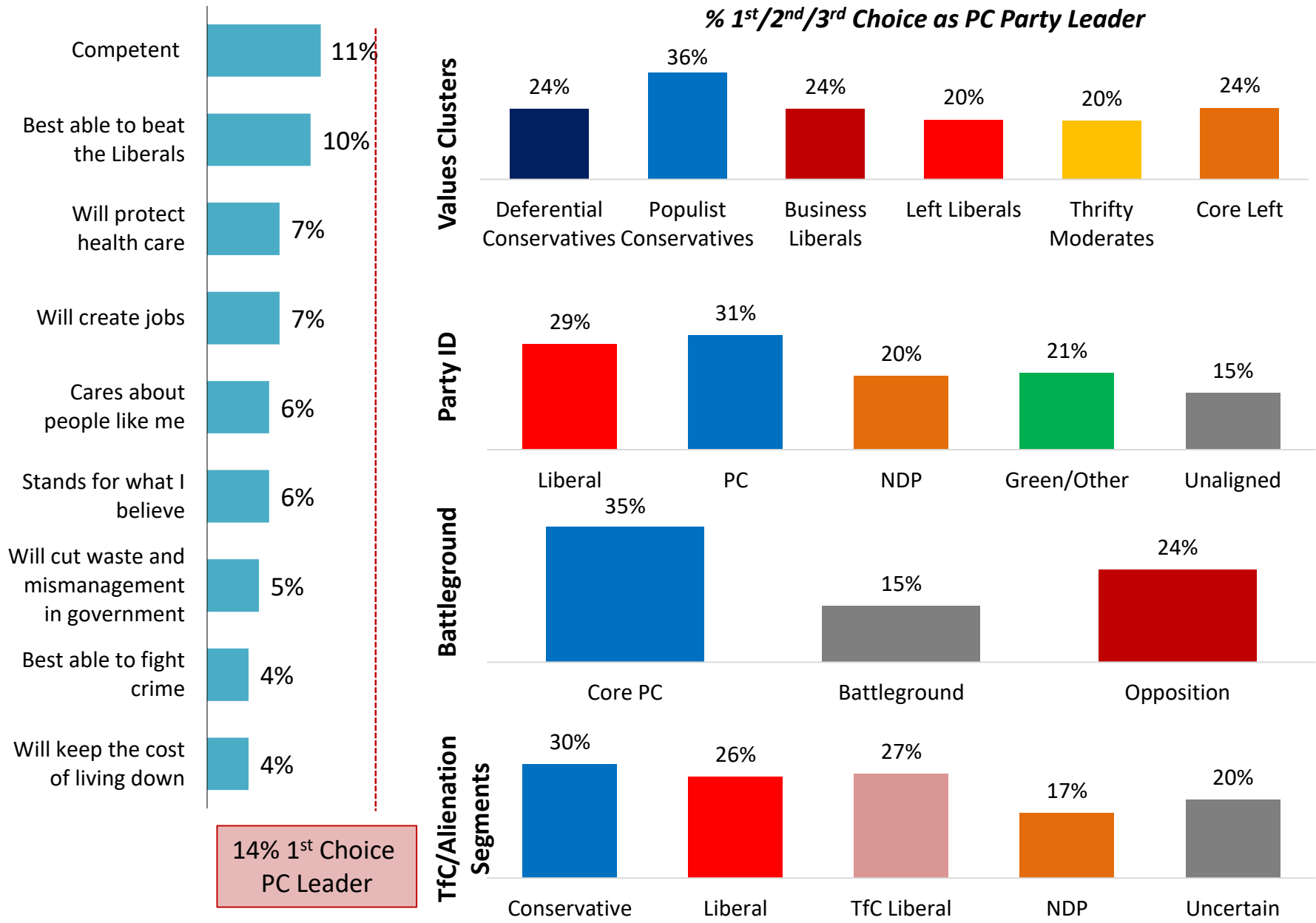
Q Below is a list of different words or phrases that describe political leaders. For each word or phrase, please indicate which of the leaders it BEST describes or whether none of them stand out on that item. How about … .

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

Attribute	Ford	Elliott	Fedeli	Mulroney	Baird	Raitt	MacLeod	Minnan-Wong	Phillips	None	Don't know
Best able to beat the Liberals	9%	10%	5%	5%	5%	5%	2%	1%	1%	18%	40%
Competent	6%	11%	6%	4%	6%	5%	3%	2%	2%	16%	38%
Cares about people like me	9%	6%	4%	4%	3%	4%	2%	2%	1%	24%	43%
Stands for what I believe	8%	6%	4%	3%	4%	4%	2%	3%	1%	23%	43%
Best able to fight crime	9%	4%	4%	2%	6%	2%	2%	1%	1%	22%	47%
Will create jobs	7%	7%	5%	3%	4%	3%	2%	1%	1%	23%	44%
Will cut waste and mismanagement in government	10%	5%	6%	2%	3%	4%	2%	2%	1%	23%	42%
Will keep the cost of living down	8%	4%	6%	2%	4%	3%	1%	1%	1%	25%	43%
Will protect health care	7%	7%	5%	4%	2%	3%	3%	1%	1%	21%	45%

Legend: ■ Ford ■ Elliott ■ Fedeli ■ Mulroney ■ Baird ■ Raitt ■ MacLeod ■ Minnan-Wong ■ Phillips

Christine Elliott: Rated highest on competence; most popular in all conservative segments

Competent — 11%

Best able to beat the Liberals — 10%

Will protect health care — 7%

Will create jobs — 7%

Cares about people like me — 6%

Stands for what I believe — 6%

Will cut waste and mismanagement in government — 5%

Best able to fight crime — 4%

Will keep the cost of living down — 4%

14% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
24%	36%	24%	20%	20%	24%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
29%	31%	20%	21%	15%

Battleground

Core PC	Battleground	Opposition
35%	15%	24%

TfC/Alienation Segments

Conservative	Liberal	TfC Liberal	NDP	Uncertain
30%	26%	27%	17%	20%

Doug Ford: Strongest on cutting waste and mismanagement; most popular among TfC Liberals

% 1st/2nd/3rd Choice as PC Party Leader

Will cut waste and mismanagement in government — 10%

Cares about people like me — 9%

Best able to fight crime — 9%

Best able to beat the Liberals — 9%

Will keep the cost of living down — 8%

Stands for what I believe — 8%

Will create jobs — 7%

Will protect health care — 7%

Competent — 6%

10% 1st Choice PC Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
23%	21%	14%	12%	15%	14%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
17%	21%	15%	12%	9%

Battleground

Core PC	Battleground	Opposition
19%	17%	14%

TfC/Alienation Segments

Conservative	Liberal	TfC Liberal	NDP	Uncertain
22%	7%	39%	10%	10%

Vic Fedeli: Strongest on competence, cutting waste and cost of living; most popular across conservative segments

% 1st/2nd/3rd Choice as PC Party Leader
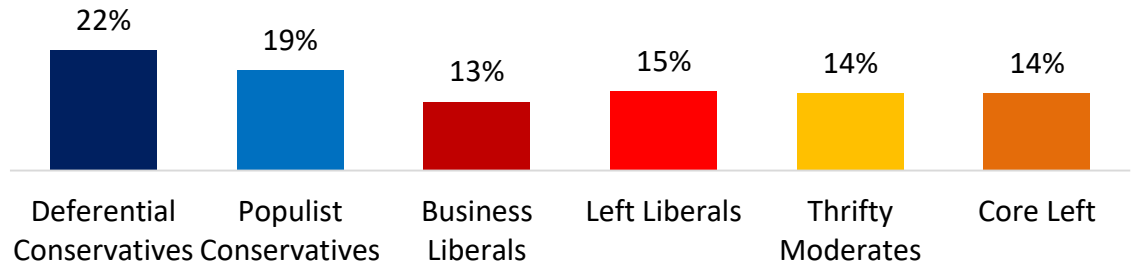
Left panel:
- Competent — 6%
- Will cut waste and mismanagement in government — 6%
- Will keep the cost of living down — 6%
- Will protect health care — 5%
- Best able to beat the Liberals — 5%
- Will create jobs — 5%
- Cares about people like me — 4%
- Stands for what I believe — 4%
- Best able to fight crime — 4%

7% 1st Choice PC Leader

Values Clusters: Deferential Conservatives 19%, Populist Conservatives 27%, Business Liberals 16%, Left Liberals 9%, Thrifty Moderates 17%, Core Left 9%

Party ID: Liberal 15%, PC 26%, NDP 16%, Green/Other 6%, Unaligned 7%

Battleground: Core PC 26%, Battleground 12%, Opposition 12%

TfC/Alienation Segments: Conservative 21%, Liberal 11%, TfC Liberal 18%, NDP 15%, Uncertain 14%

Caroline Mulroney: Strongest on ability to beat Liberals; most popular among Deferentials and other conservatives

% 1st/2nd/3rd Choice as PC Party Leader

Best able to beat the Liberals — 5%
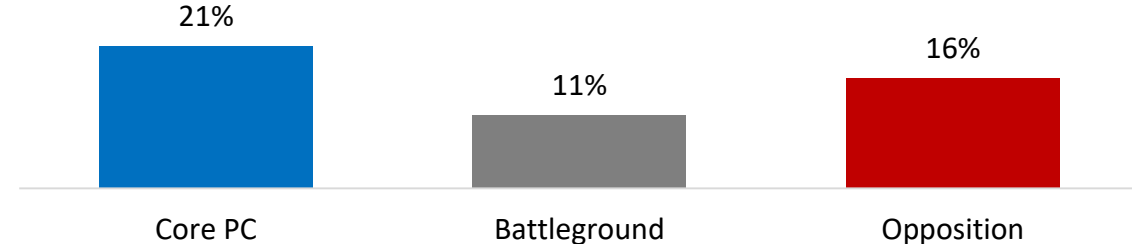Competent — 4%
Cares about people like me — 4%
Will protect health care — 4%
Stands for what I believe — 3%
Will create jobs — 3%
Will cut waste and mismanagement in government — 2%
Best able to fight crime — 2%
Will keep the cost of living down — 2%

6% 1st Choice PC Leader

Values Clusters
- Deferential Conservatives: 22%
- Populist Conservatives: 19%
- Business Liberals: 13%
- Left Liberals: 15%
- Thrifty Moderates: 14%
- Core Left: 14%

Party ID
- Liberal: 16%
- PC: 21%
- NDP: 14%
- Green/Other: 20%
- Unaligned: 8%

Battleground
- Core PC: 21%
- Battleground: 11%
- Opposition: 16%

TfC/Alienation Segments
- Conservative: 18%
- Liberal: 15%
- TfC Liberal: 19%
- NDP: 14%
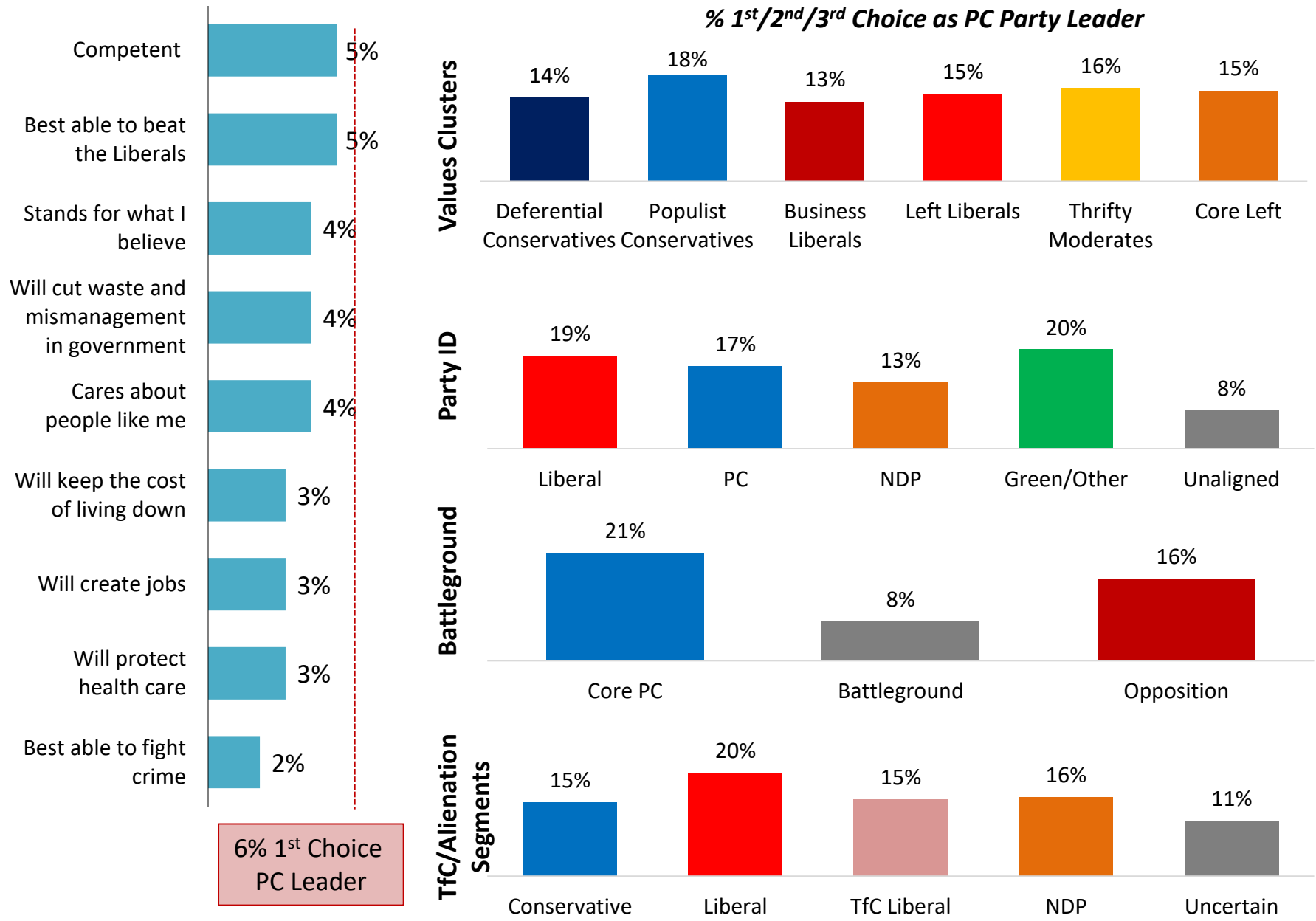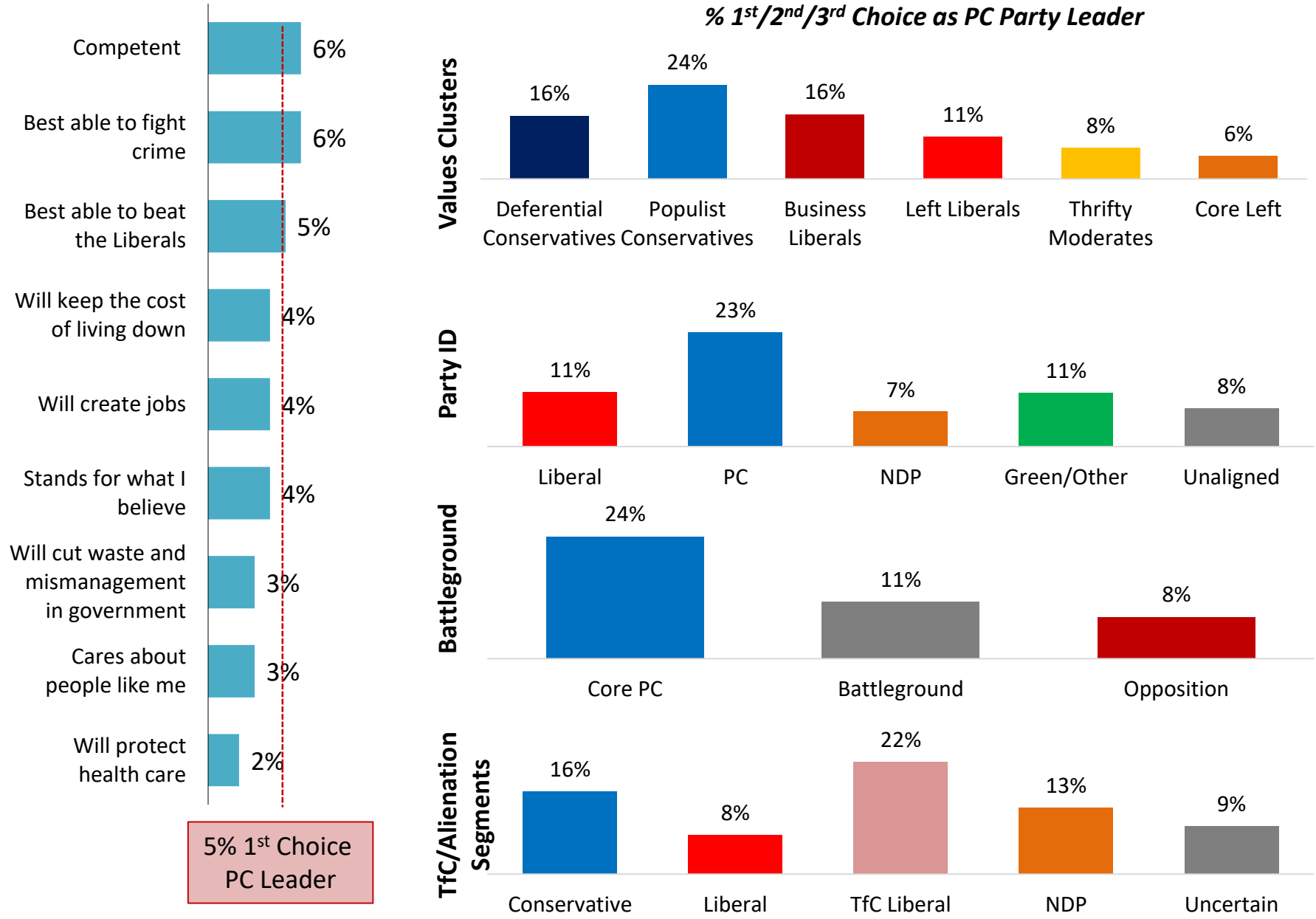- Uncertain: 13%

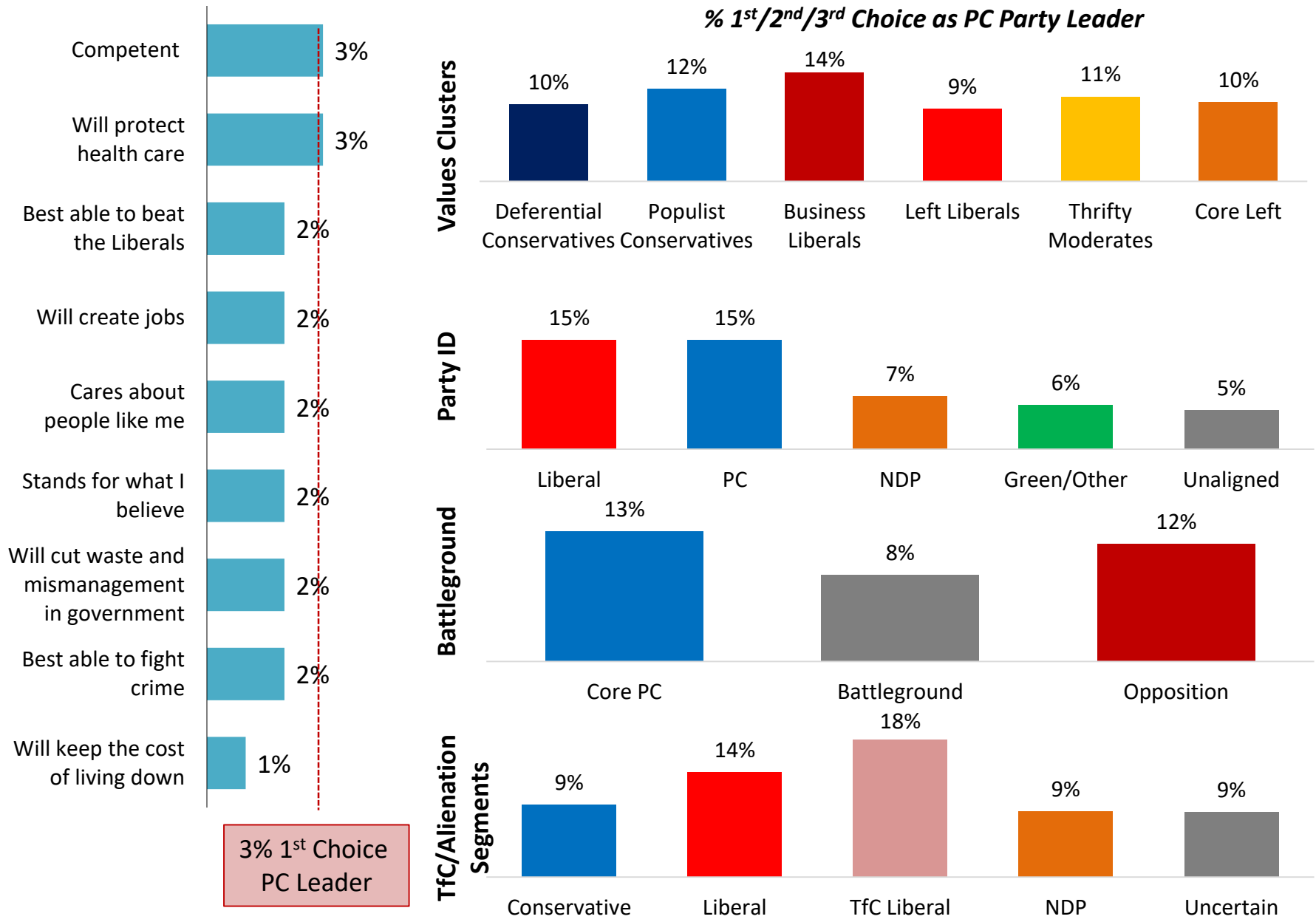# Lisa Raitt: Strongest on competence and ability to beat Liberals; popularity spread across political spectrum

Attribute	Value
Competent	5%
Best able to beat the Liberals	5%
Stands for what I believe	4%
Will cut waste and mismanagement in government	4%
Cares about people like me	4%
Will keep the cost of living down	3%
Will create jobs	3%
Will protect health care	3%
Best able to fight crime	2%

6% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
14%	18%	13%	15%	16%	15%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
19%	17%	13%	20%	8%

Battleground

Core PC	Battleground	Opposition
21%	8%	16%

TfC/Alienation Segments

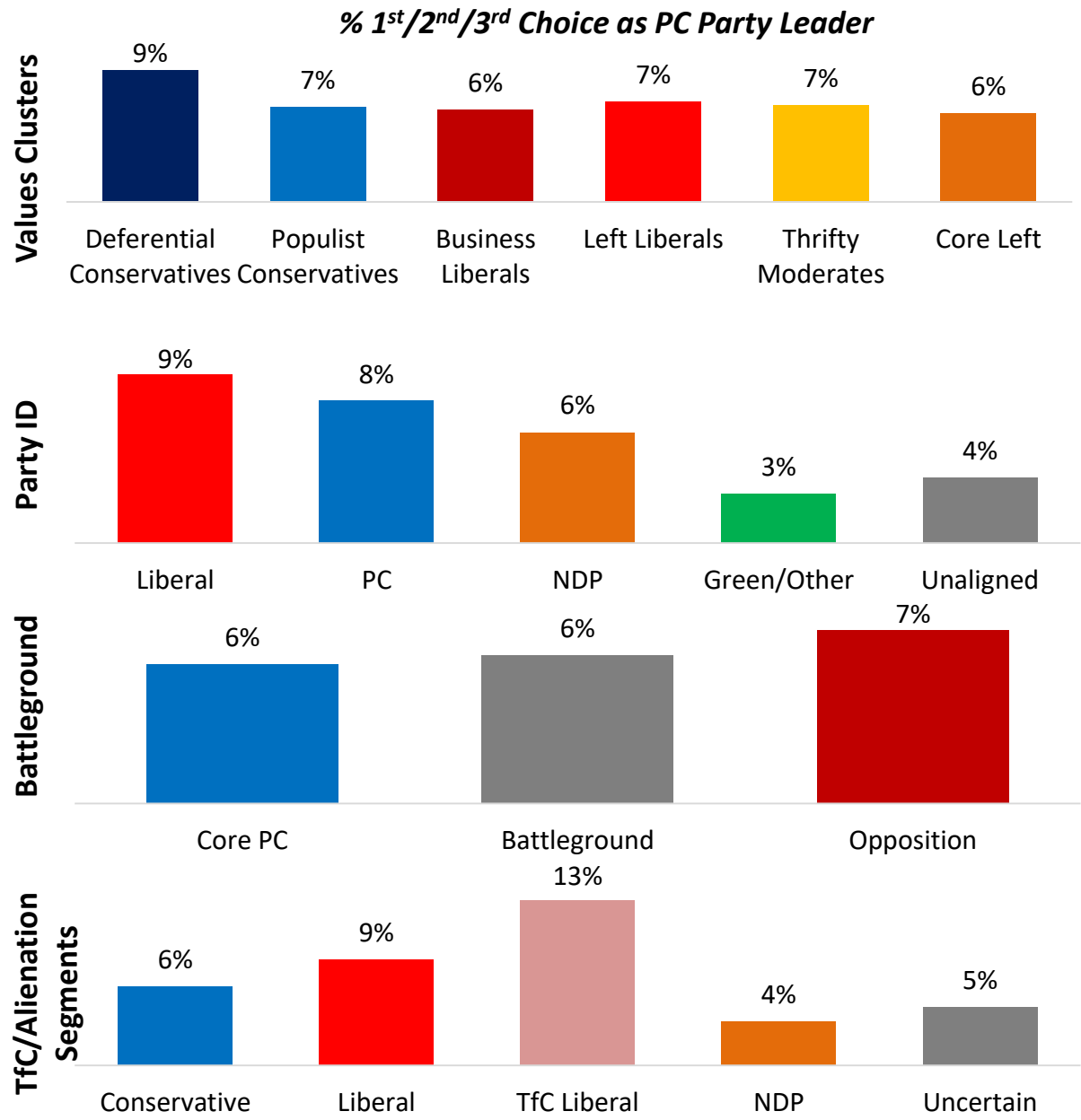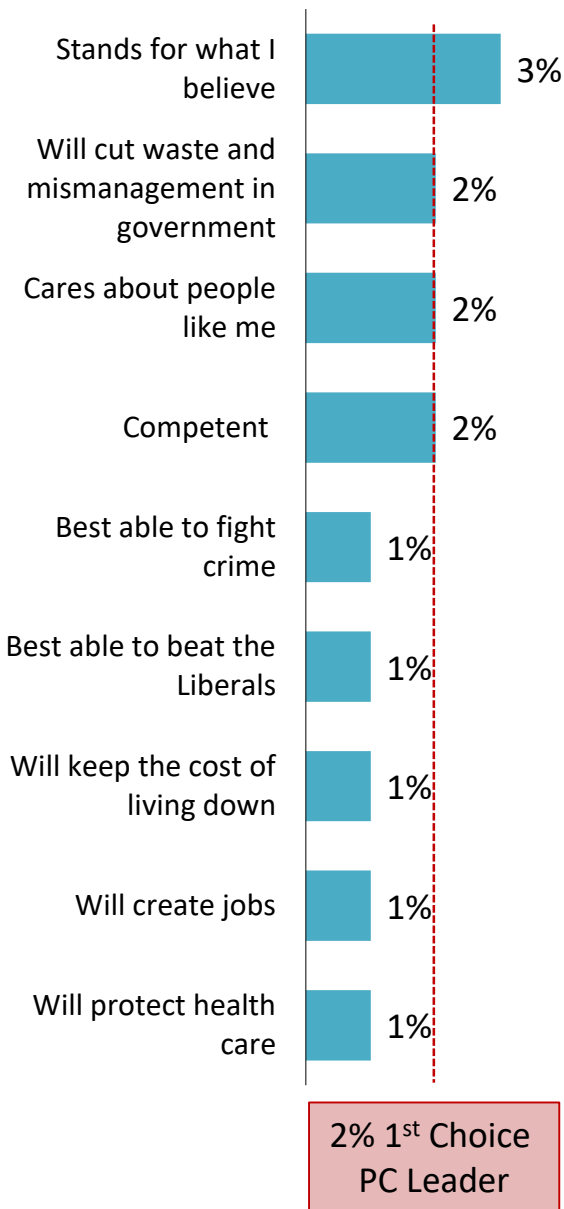| Conservative	Liberal	TfC Liberal	NDP	Uncertain
15%	20%	15%	16%	11%

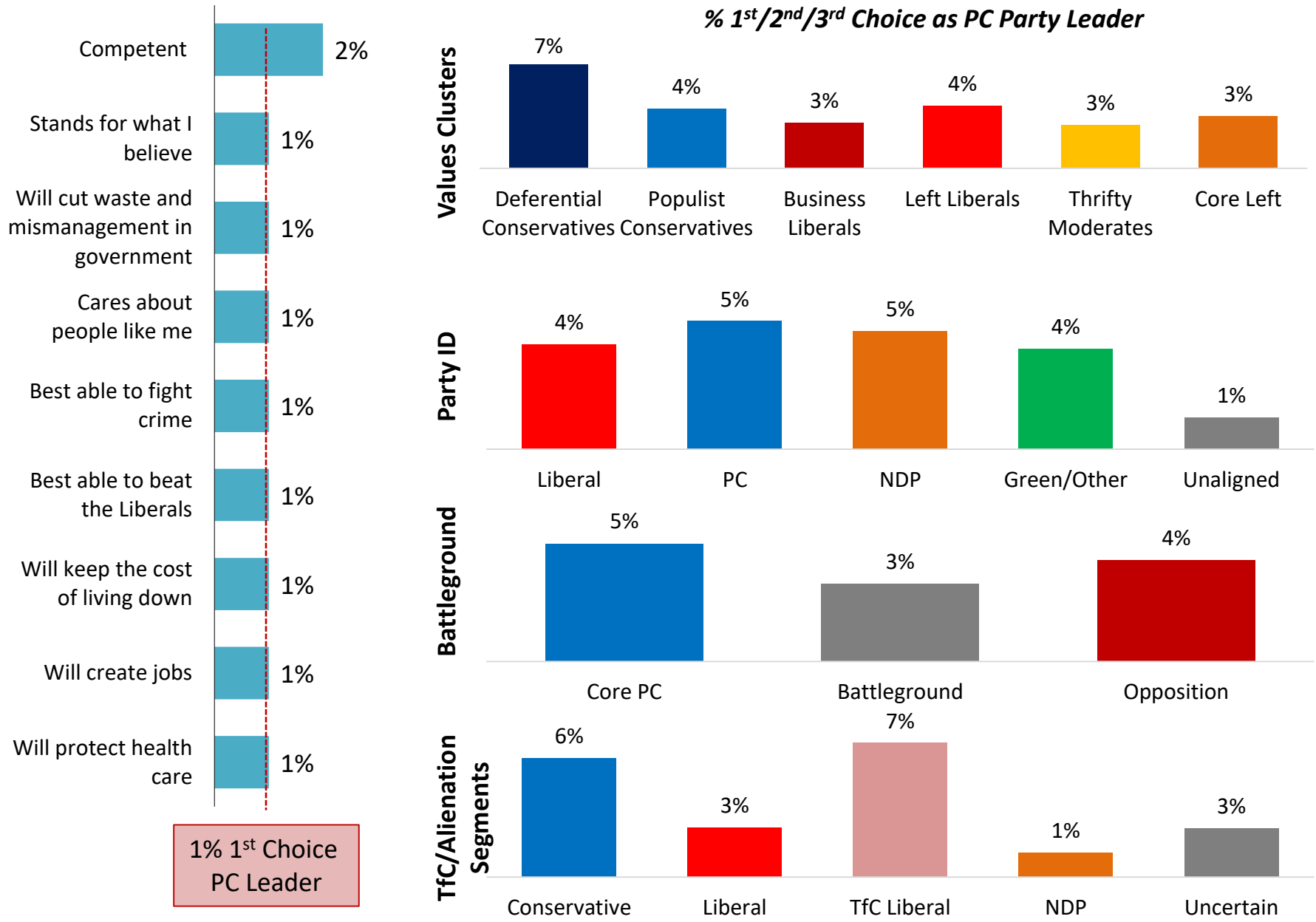# John Baird: Strongest on competence and fighting crime; popularity highest among core Conservatives and TfC Liberals

Attribute	%
Competent	6%
Best able to fight crime	6%
Best able to beat the Liberals	5%
Will keep the cost of living down	4%
Will create jobs	4%
Stands for what I believe	4%
Will cut waste and mismanagement in government	3%
Cares about people like me	3%
Will protect health care	2%

5% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
16%	24%	16%	11%	8%	6%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
11%	23%	7%	11%	8%

Battleground

Core PC	Battleground	Opposition
24%	11%	8%

TfC/Alienation Segments

Conservative	Liberal	TfC Liberal	NDP	Uncertain
16%	8%	22%	13%	9%

Lisa MacLeod: Strongest on competence and healthcare; highest popularity found in Liberal segments

Attribute	%
Competent	3%
Will protect health care	3%
Best able to beat the Liberals	2%
Will create jobs	2%
Cares about people like me	2%
Stands for what I believe	2%
Will cut waste and mismanagement in government	2%
Best able to fight crime	2%
Will keep the cost of living down	1%

3% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
10%	12%	14%	9%	11%	10%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
15%	15%	7%	6%	5%

Battleground

Core PC	Battleground	Opposition
13%	8%	12%

TfC/Alienation Segments

Conservative	Liberal	TfC Liberal	NDP	Uncertain
9%	14%	18%	9%	9%

Denzil Minnan-Wong: Strongest on relatability; most popular among TfC Liberals

Stands for what I believe — 3%
Will cut waste and mismanagement in government — 2%
Cares about people like me — 2%
Competent — 2%
Best able to fight crime — 1%
Best able to beat the Liberals — 1%
Will keep the cost of living down — 1%
Will create jobs — 1%
Will protect health care — 1%

2% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters

Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
9%	7%	6%	7%	7%	6%

Party ID

Liberal	PC	NDP	Green/Other	Unaligned
9%	8%	6%	3%	4%

Battleground

Core PC	Battleground	Opposition
6%	6%	7%

TfC/Alienation Segments

Conservative	Liberal	TfC Liberal	NDP	Uncertain
6%	9%	13%	4%	5%

Rod Phillips: Rated highest on competence; most popular among Deferential Conservatives and TfC Liberals

Competent — 2%
Stands for what I believe — 1%
Will cut waste and mismanagement in government — 1%
Cares about people like me — 1%
Best able to fight crime — 1%
Best able to beat the Liberals — 1%
Will keep the cost of living down — 1%
Will create jobs — 1%
Will protect health care — 1%

1% 1st Choice PC Leader

% 1st/2nd/3rd Choice as PC Party Leader

Values Clusters:
- Deferential Conservatives 7%
- Populist Conservatives 4%
- Business Liberals 3%
- Left Liberals 4%
- Thrifty Moderates 3%
- Core Left 3%

Party ID:
- Liberal 4%
- PC 5%
- NDP 5%
- Green/Other 4%
- Unaligned 1%

Battleground:
- Core PC 5%
- Battleground 3%
- Opposition 4%

TfC/Alienation Segments:
- Conservative 6%
- Liberal 3%
- TfC Liberal 7%
- NDP 1%
- Uncertain 3%

PC Party Leadership – Vote Impact

Voting Impact Test: We used a split sample to obtain data on the impact of every different candidate

In order to test the impact of each leadership candidate on potential voting, each respondent was asked how they would vote if a given candidate were selected as the leader. Each respondent was randomly shown 3 of the 9 candidates.

As we have been discussing, the Ontario PCs will have a new leader in the next election. It is expected that Kathleen Wynne will continue as leader of the Liberals and Andrea Horwath will continue as leader of the Ontario NDP. If (CANDIDATE) is leader of the Ontario PCs in the next election, which party would you be most likely to vote for?

→ **First candidate** → **Second candidate** → **Third candidate**
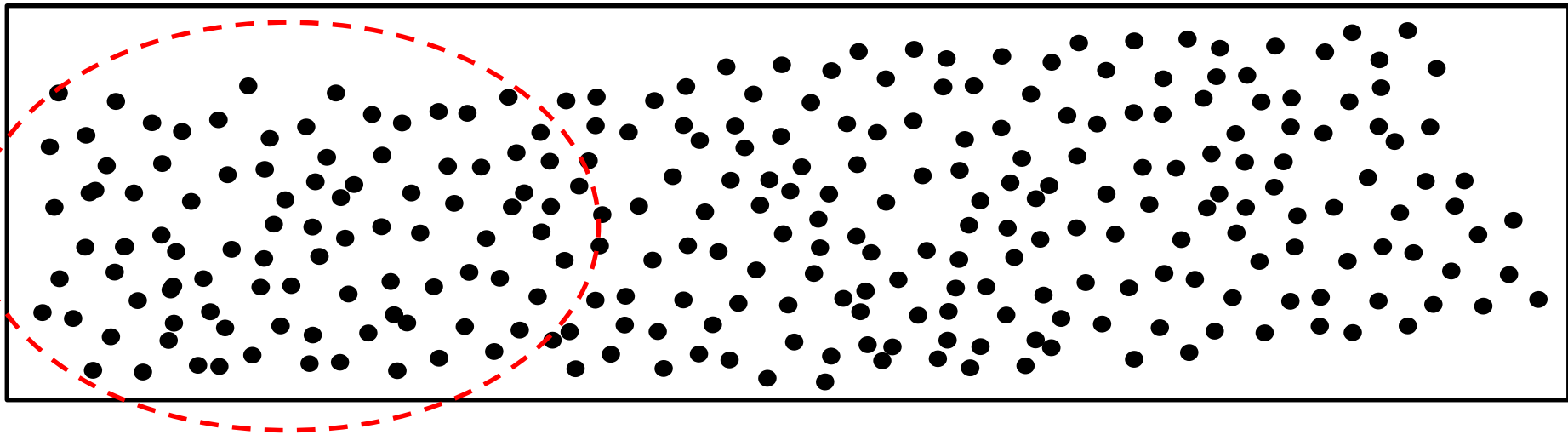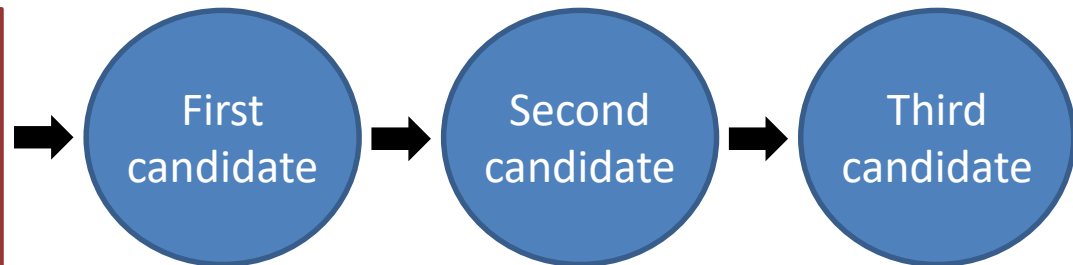
The result is that we have asked about 1 in 3 people in the sample (randomly selected) about each leader. This gives us a split sample showing how, on average, 333 respondents would vote in each case

Initial Vote vs Candidate Test Ballot: PCs maintain lead over Liberals in test ballot, but undecided doubles

Q 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]

COMPARED TO

If (RANDOMLY SELECT AND INSERT CANDIDATE NAME) is leader of the Ontario PCs in the next election, which party would you be most likely to vote for?

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

	Liberal	Progressive Conservative	NDP	Green	Other	Open to all parties	Undecided/ Don't know	Would not vote/ None
Initial	28%	32%	19%	8%	2%	N/A	10%	2%
Avg Across Candidates	20%	26%	18%	5%	1%	5%	20%	4%

INNOVATIVE
RESEARCH GROUP
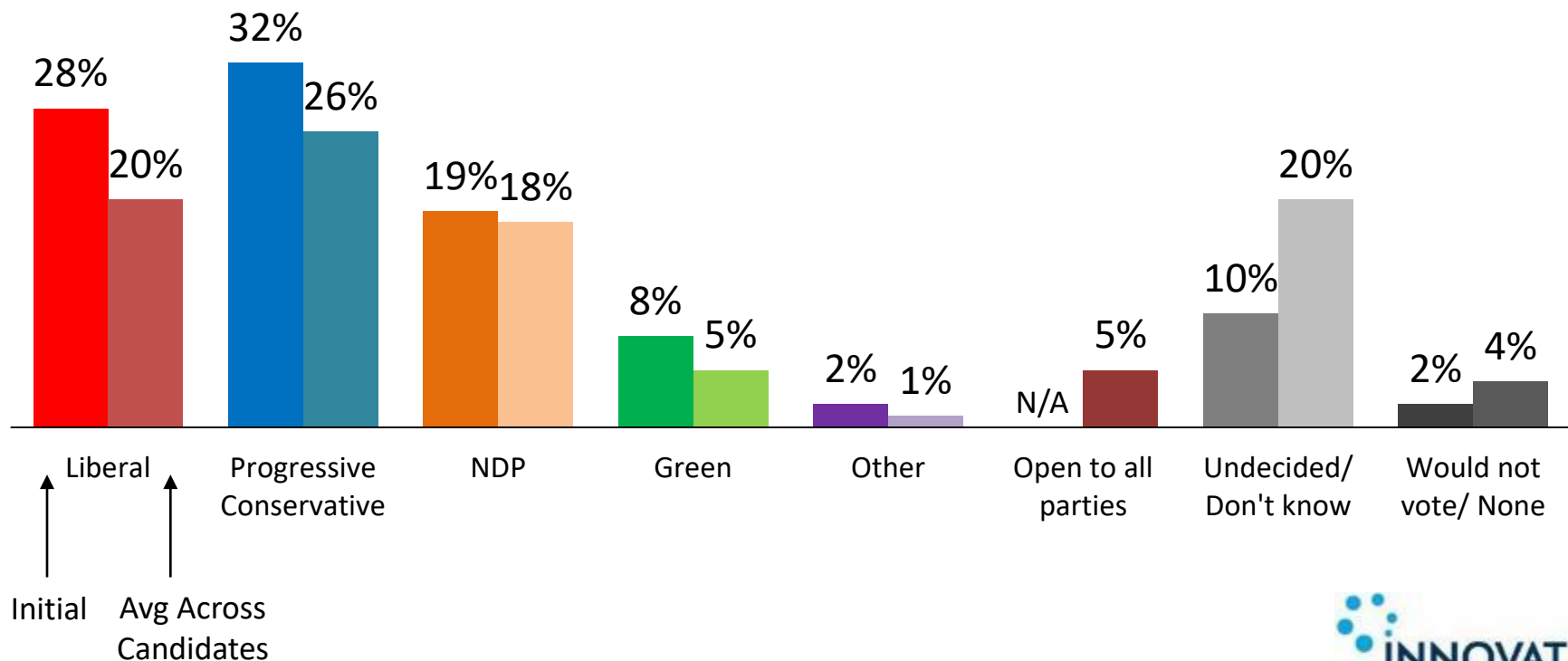
Initial Vote by Candidate Sub-Sample: To compare candidate impact, note the initial PC support in the subsample

Q 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; n=1,000]

	Ford (n=334)	Minnan-Wong (n=322)	Phillips (n=348)	Mulroney (n=338)	Elliott (n=339)	MacLeod (n=342)	Fedeli (n=322)	Baird (n=334)	Raitt (n=322)
PC Party	33%	28%	33%	33%	32%	32%	31%	35%	29%
Liberal Party	31%	30%	26%	26%	24%	28%	25%	26%	32%
NDP	14%	20%	19%	20%	21%	18%	19%	17%	18%
Green Party	6%	7%	8%	7%	7%	9%	7%	8%	8%
Another Party	2%	2%	1%	1%	1%	2%	2%	1%	1%
Undecided / Don't know	11%	10%	11%	10%	12%	8%	12%	10%	8%
Would not vote	2%	3%	2%	2%	2%	2%	2%	3%	3%

Leadership Impact: Liberal and PC votes decline for every candidate as voters re-consider options

Q As we have been discussing, the Ontario PCs will have a new leader in the next election. It is expected that Kathleen Wynne will continue as leader of the Liberals and Andrea Horwath will continue as leader of the Ontario NDP. If (CANDIDATE) is leader of the Ontario PCs in the next election, which party would you be most likely to vote for?
[asked of all respondents; split sample]

	Ford (n=334)	Minnan-Wong (n=322)	Phillips (n=348)	Mulroney (n=338)	Elliott (n=339)	MacLeod (n=342)	Fedeli (n=322)	Baird (n=334)	Raitt (n=322)
PC Party	22%	19%	21%	24%	26%	22%	25%	29%	22%
Liberal Party	24%	20%	18%	20%	17%	18%	17%	22%	22%
NDP	15%	23%	17%	19%	18%	19%	19%	16%	17%
Green Party	7%	4%	5%	5%	5%	6%	5%	6%	4%
Another Party	1%	1%	1%	1%	0%	2%	2%	1%	0%
Open to all parties	4%	7%	5%	5%	5%	7%	4%	4%	6%
Undecided / Don't know	20%	20%	30%	22%	25%	22%	24%	19%	23%
Would not vote	6%	5%	3%	5%	4%	5%	4%	3%	6%

Impact vs. Combined Vote: In all scenarios, undecideds jump (sig. at 95%); Baird and Elliott show smallest drop for PCs

Percentage Point Impact: Vote with candidate as leader for the Ontario PCs *minus* Combined Vote if election were held today (among sample split sample as asked about each leader).

	Ford (n=334)	Minnan-Wong (n=322)	Phillips (n=348)	Mulroney (n=338)	Elliott (n=339)	MacLeod (n=342)	Fedeli (n=322)	Baird (n=334)	Raitt (n=322)
PC Party	-11	-9	-11	-9	-6	-9	-7	-6	-7
Liberal Party	-8	-10	-9	-6	-8	-10	-8	-4	-10
NDP	+1	+3	-2	-1	-2	+1	-1	0	-2
Green	+1	-2	-3	-2	-2	-3	-2	-3	-3
Other	-1	-1	0	-1	-1	-1	0	0	-1
Undecided/DK/Open to all parties	+14	+17	+24	+16	+18	+20	+16	+12	+21
Would not vote	+4	+2	+1	+3	+1	+2	+2	+1	+3
NET impact on PC vs. LIB margin	-3	+1	-3	-3	+2	+1	+2	-3	+4

Note: Results **in red** are significantly different from 0 at a 95% confidence level.
Results **in blue** are significantly different from 0 at a 90% confidence level.

Vote Switching

Vote Loyalty Segmentation: Equal numbers of original Liberal and PC voters switch with new PC party leader

Original provincial vote intent vs Vote intent on test ballot with various potential candidates as PC party leader

Steady Liberal 17%

Liberal Switchers 7%

Other 48%

Steady PC 21%

PC Switchers 7%

INNOVATIVE
RESEARCH GROUP
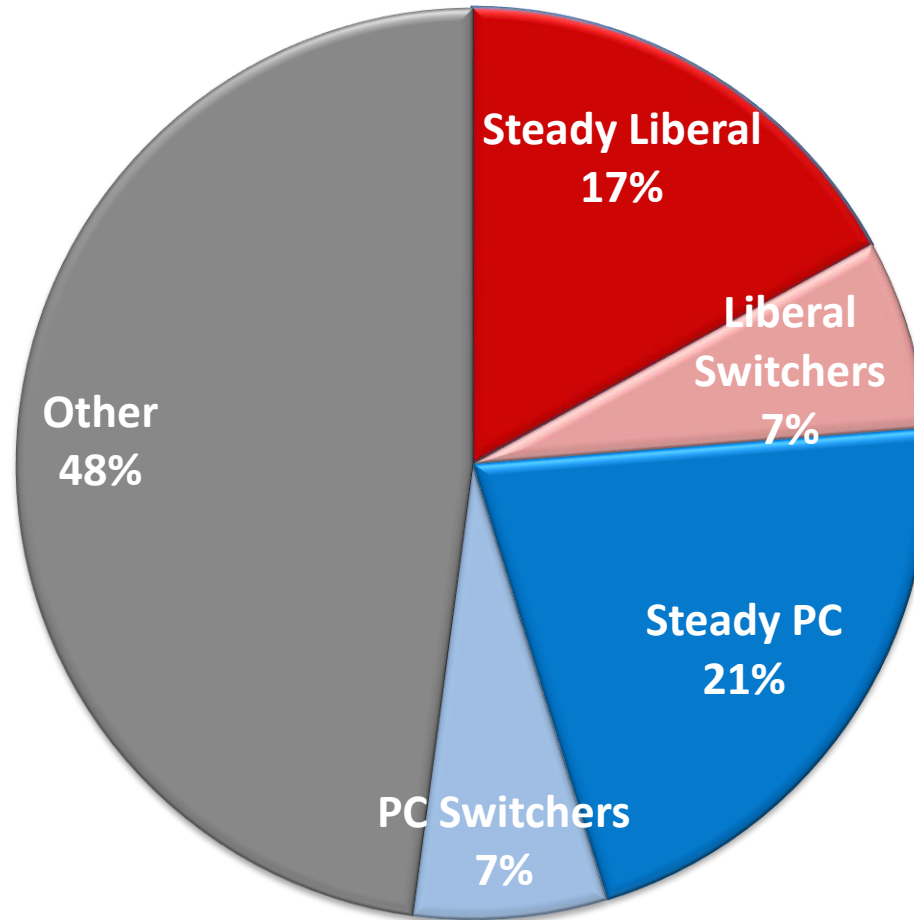
PC Switchers more favourable on Wynne, more feminist and marginally more interested in NDP than Steady PCs

	Steady Liberal	Liberal Switchers	Steady PC	PC Switchers	Other
Very/somewhat favourable opinion of Kathleen Wynne	72%	43%	1%	13%	13%
Agree: I personally would describe myself as a feminist	59%	52%	23%	39%	43%
TfC/Alienation Segments					
Conservative	1%	4%	63%	50%	21%
Core/Soft Liberal	76%	42%	1%	3%	10%
Time for Change Liberal	20%	42%	2%	14%	9%
NDP	1%	3%	9%	14%	29%
Uncertain	3%	9%	26%	19%	31%

INNOVATIVE
RESEARCH GROUP

First Choice by Vote Loyalty: Ford chosen over Elliott among Liberal and PC Switchers

Vote Loyalty Segments

PC leadership preference (First Choice) BY Vote Loyalty Segment

■ Steady Liberal   ■ Liberal Switchers   ■ Steady PC   ■ PC Switchers   ■ Other

17%
7%
21%
7%
48%

	None	Don't know
Steady Liberal — Elliott 21%, Ford 14%, Fedeli 7%, Raitt 10%, Mulroney 4%, Baird 4%, MacLeod 3%, Minnan-Wong 4%, Phillips 1%	12%	22%
Liberal Switchers — Elliott 7%, Ford 15%, Fedeli 6%, Raitt 4%, Mulroney 1%, Baird 6%, MacLeod 4%, Minnan-Wong 4%, Phillips 4%	9%	38%
Steady PC — Elliott 20%, Ford 13%, Fedeli 9%, Raitt 7%, Mulroney 7%, Baird 11%, MacLeod 5%, Minnan-Wong 1%, Phillips 1%	2%	23%
PC Switchers — Elliott 9%, Ford 14%, Fedeli 9%, Raitt 6%, Mulroney 7%, Baird 10%, MacLeod 3%, Minnan-Wong 4%	6%	32%
Other — Elliott 10%, Ford 7%, Fedeli 5%, Raitt 5%, Mulroney 6%, Baird 3%, MacLeod 2%, Minnan-Wong 1%, Phillips 1%	17%	43%

■ Elliott   ■ Ford   ■ Fedeli   ■ Raitt   ■ Mulroney   ■ Baird   ■ MacLeod   ■ Minnan-Wong   ■ Phillips

Values

Values Tracking (1 of 3): No significant changes since October '17

Q Which of the following statements best describes your personal point of view? *Newcomers...*

... threaten traditional values: 36% 35% 39% 37% 40%
... strengthen Canadian society: 52% 54% 48% 48% 47%
Don't know: 12% 10% 14% 16% 13%

Oct '16 ■ Aug '17 ■ Oct '17 ■ Jan '18 (W1) ■ Jan '18 (W2)
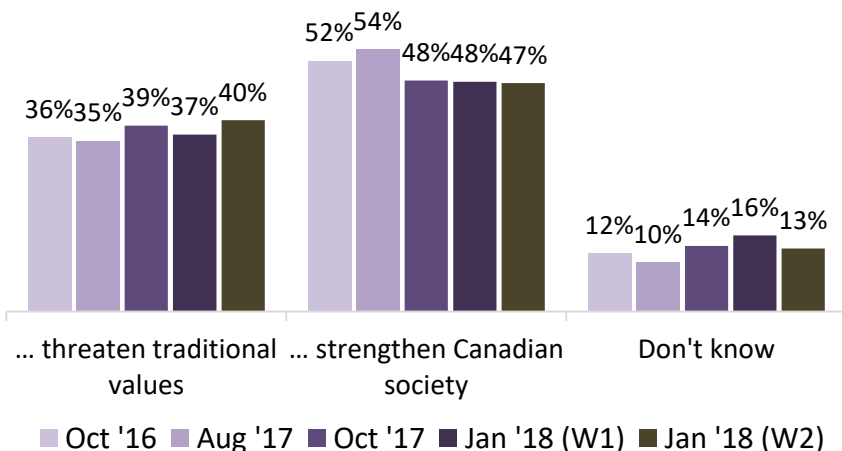
Q When it comes to trade-offs between the environment and the economy, which is more important to you?

Environment: 49% 47% 53% 44% 42% 42%
Economy: 41% 38% 37% 44% 45% 46%
Don't know: 11% 15% 10% 12% 13% 12%

Oct '16 ■ Mar '17 ■ Aug '17 ■ Oct '17 ■ Jan '18 (W1) ■ Jan '18 (W2)
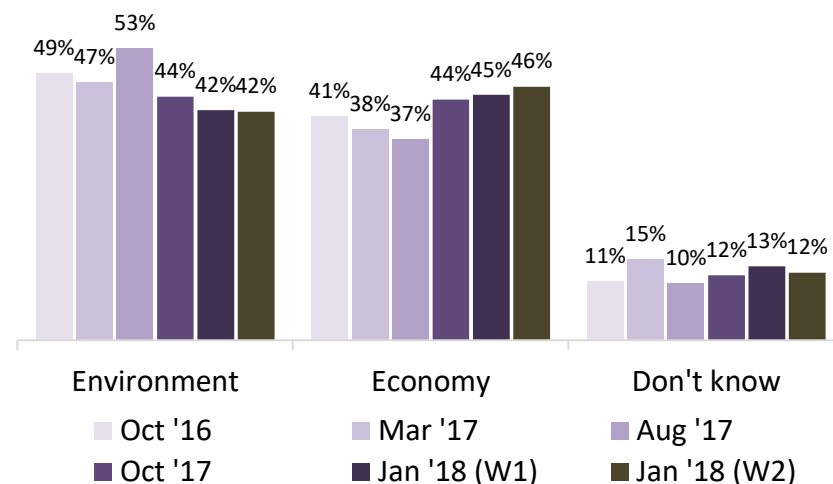
Q Thinking about the role of the provincial government when it comes to the economy, which statement is closest to your point of view?
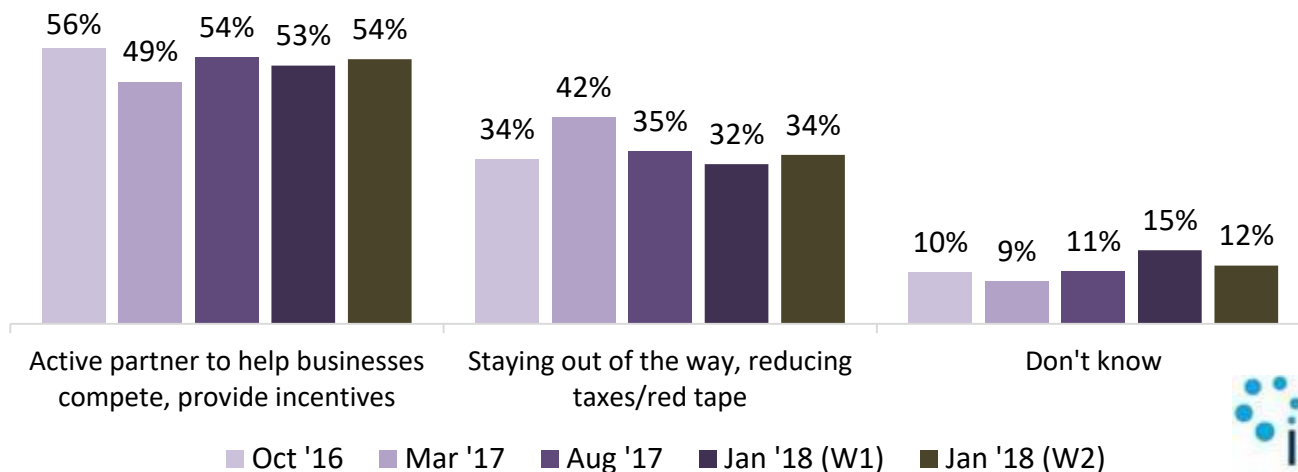
Active partner to help businesses compete, provide incentives: 56% 49% 54% 53% 54%
Staying out of the way, reducing taxes/red tape: 34% 42% 35% 32% 34%
Don't know: 10% 9% 11% 15% 12%

Oct '16 ■ Mar '17 ■ Aug '17 ■ Jan '18 (W1) ■ Jan '18 (W2)

INNOVATIVE RESEARCH GROUP

Q Do you agree or disagree with the following statements:

Equality between men and women has been achieved in Canada
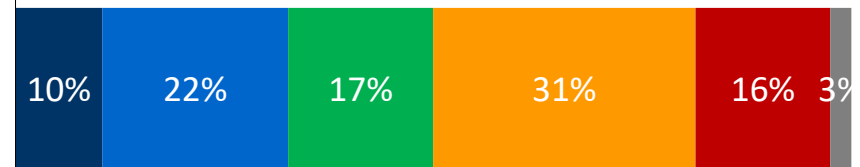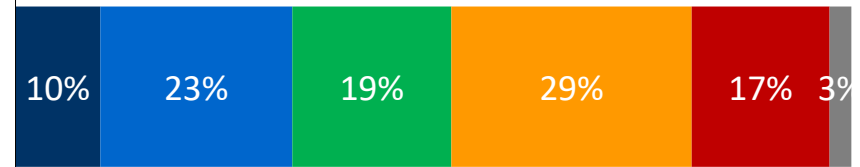
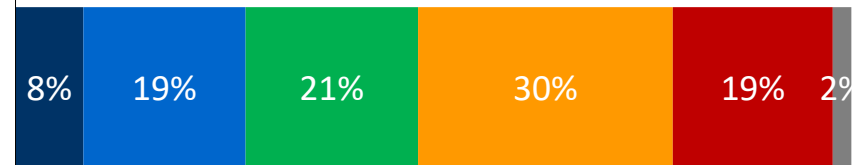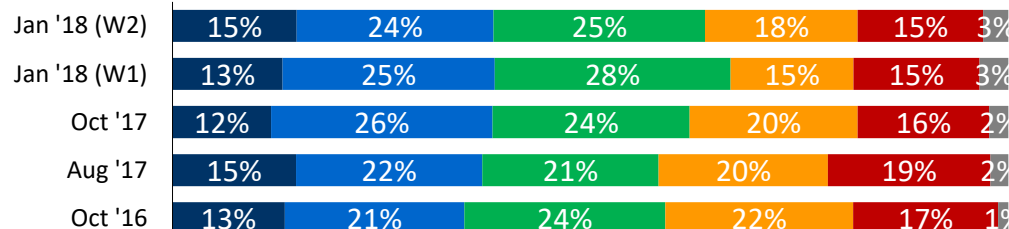|	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Jan '18 (W2)	10%	22%	17%	31%	16%	3%
Jan '18 (W1)	10%	23%	19%	29%	17%	3%
Oct '17	8%	19%	21%	30%	19%	2%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

INNOVATIVE
RESEARCH GROUP

Values Tracking (3 of 3): Marginal increase on need for strong leaders to destroy negative forces

**Q** Do you agree or disagree with the following statements:

The 'old-fashioned ways' and 'old-fashioned values' still show the best way to live.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Jan '18 (W2)	15%	24%	25%	18%	15%	3%
Jan '18 (W1)	13%	25%	28%	15%	15%	3%
Oct '17	12%	26%	24%	20%	16%	2%
Aug '17	15%	22%	21%	20%	19%	2%
Oct '16	13%	21%	24%	22%	17%	1%

Everything is changing too fast today.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Jan '18 (W2)	12%	28%	29%	18%	10%	2%
Jan '18 (W1)	13%	28%	29%	17%	10%	2%
Oct '17	13%	26%	33%	17%	9%	2%
Aug '17	15%	27%	23%	19%	13%	2%
Oct '16	11%	28%	32%	17%	10%	2%
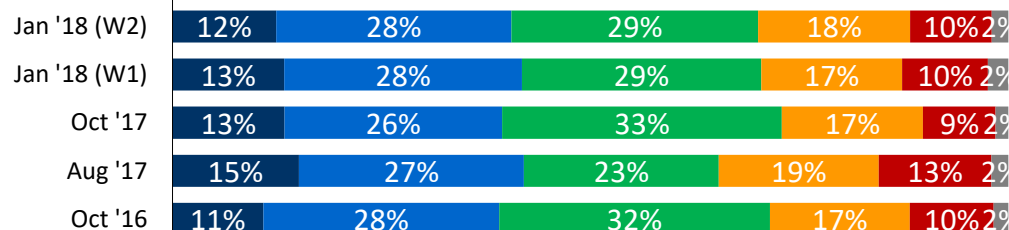
What this country needs is strong, determined leaders who will destroy the negative forces that have taken us from our true path and silence the trouble makers spreading bad ideas.
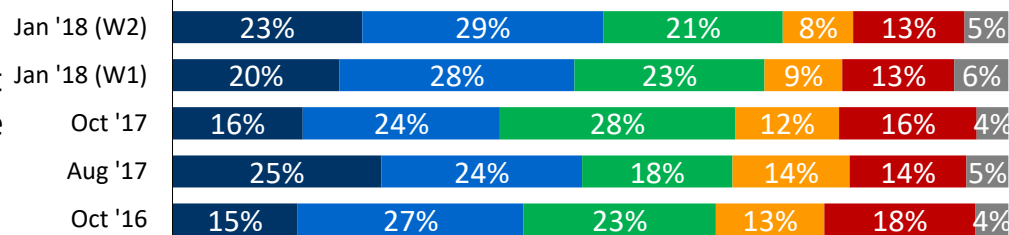
	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Jan '18 (W2)	23%	29%	21%	8%	13%	5%
Jan '18 (W1)	20%	28%	23%	9%	13%	6%
Oct '17	16%	24%	28%	12%	16%	4%
Aug '17	25%	24%	18%	14%	14%	5%
Oct '16	15%	27%	23%	13%	18%	4%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

INNOVATIVE
RESEARCH GROUP

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 +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.*

INNOVATIVE
RESEARCH GROUP

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%

Building Understanding.

Personalized research to connect you and your audiences.

For more information, please contact:

Greg Lyle

President
(t) 416-642-6429
(e) glyle@innovativeresearch.ca