

Ontario Politics on the Eve of the Election

Summary of Key Results



Methodology:

- This summary is based on the results from a series of monthly telephone and online surveys.
- For the core voting information, we rely on our monthly province-wide telephone surveys. These surveys sample randomly-selected Ontario residents, 18 years of age and older. Only one respondent per household was eligible to complete each survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.



All phone samples were 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.

For benchmarking, the 2014 study was completed between March 14th and 25th, 2014 (unweighted n=608). The 2018 study was completed between March 13th and 20th, 2018 (unweighted n=603).

- All additional results come from a series of national online surveys. The most recent was conducted from April 2nd to April 9th, 2018 among 920 adult Ontarians.



Respondents qualified to complete the surveys if they are above the age of 18 and currently residing in Canada. The results are weighted to n= 600 based on Census data from Stats Can.

This is a representative sample. However, since online surveys are 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.

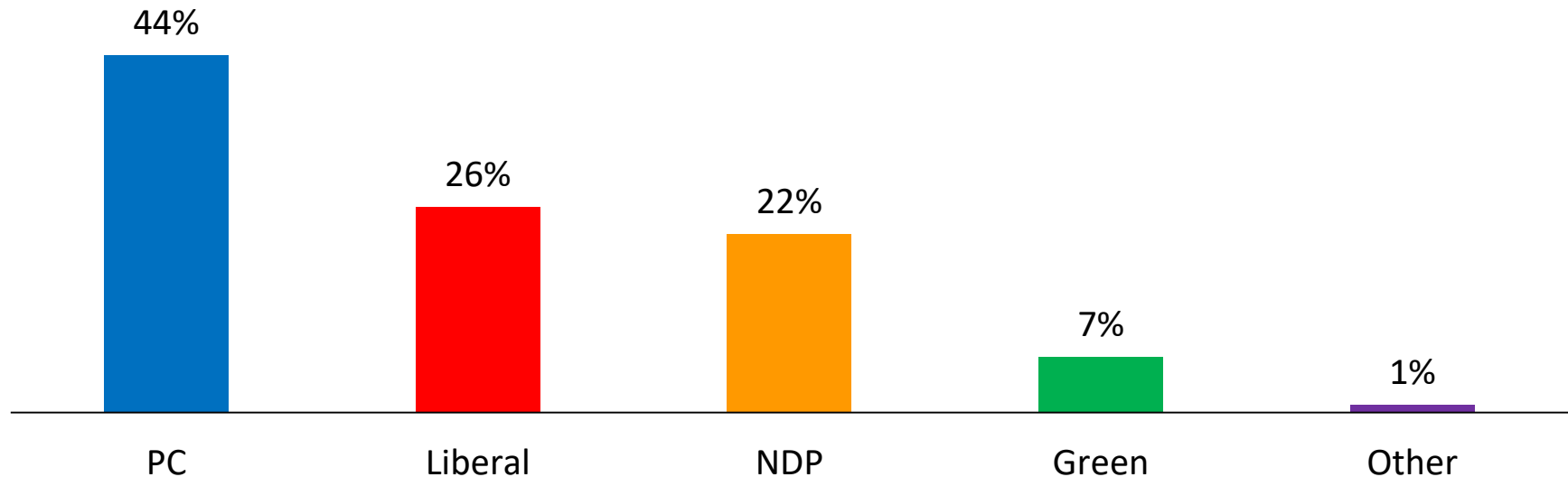
The Horserace

Provincial Decided Vote: More than 4-in-10 decided would vote PC (44%), 1-in-4 (26%) Liberal, 22% NDP

Q

If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party? In that case, which party's candidate do you lean toward slightly? [DECIDED VOTE]

[only decided voters, n=483]



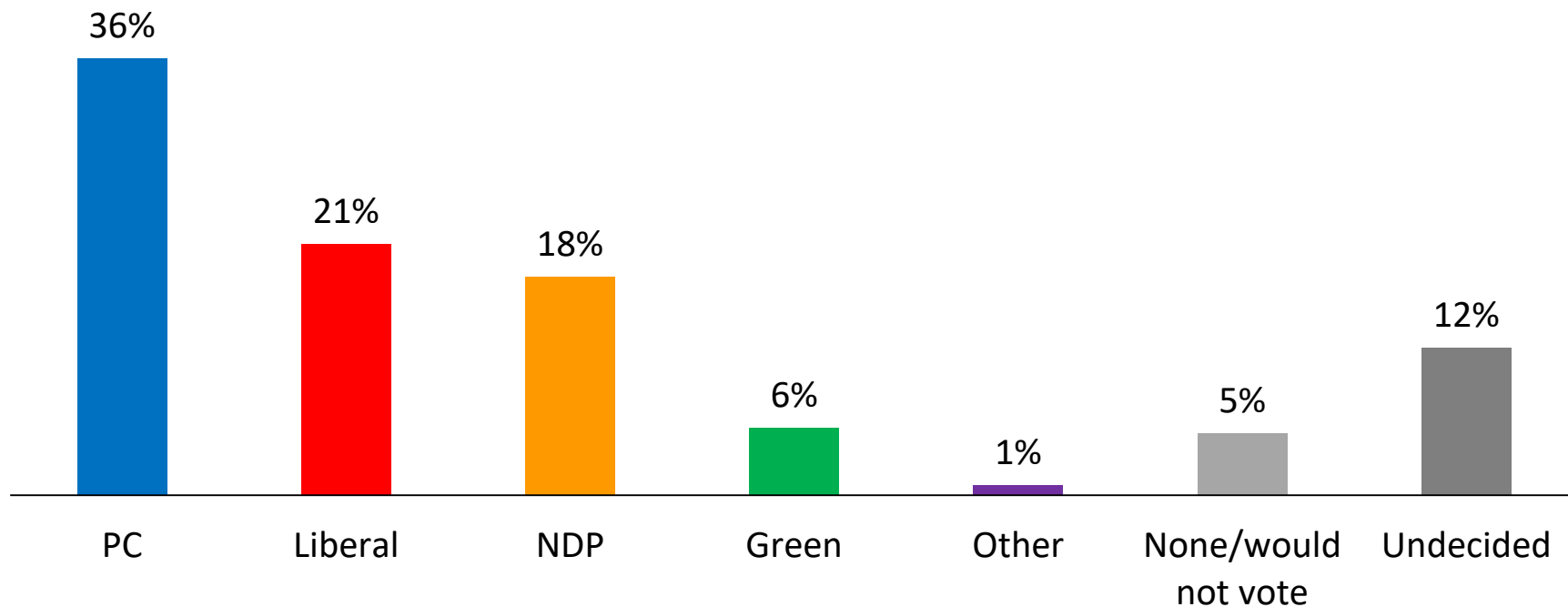
Provincial Vote: PCs (36%) 15 points ahead of Liberals (21%); 18% would vote NDP with 12% undecided

Q

If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party?

... In that case, which party's candidate do you lean toward slightly? [**Vote + Lean**]

[asked of all respondents; n=600]



Note: 'Refused' (2%) not shown.
(Current data: Phone March 2018)

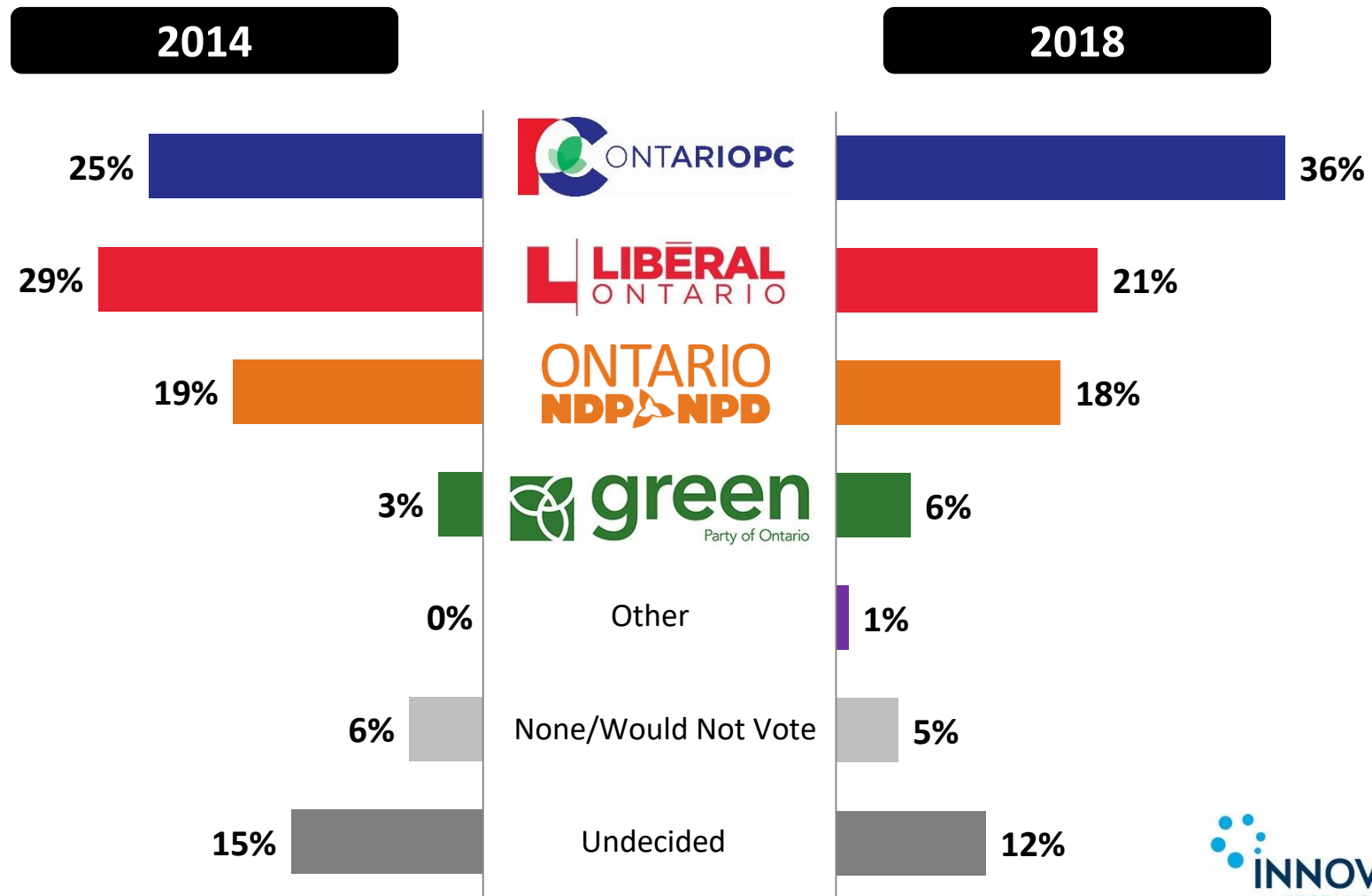
Provincial Vote: With an 11-point gain since 2014, PCs now have a 15-point advantage over the Liberals

Q

If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party?

... In that case, which party's candidate do you lean toward slightly? [**Vote + Lean**]

[asked of all respondents; n=600]



Provincial Vote Tracking: PCs (36%) build healthy lead over Liberals (21%); NDP (18%) up 3 points, undecided drops to 12%

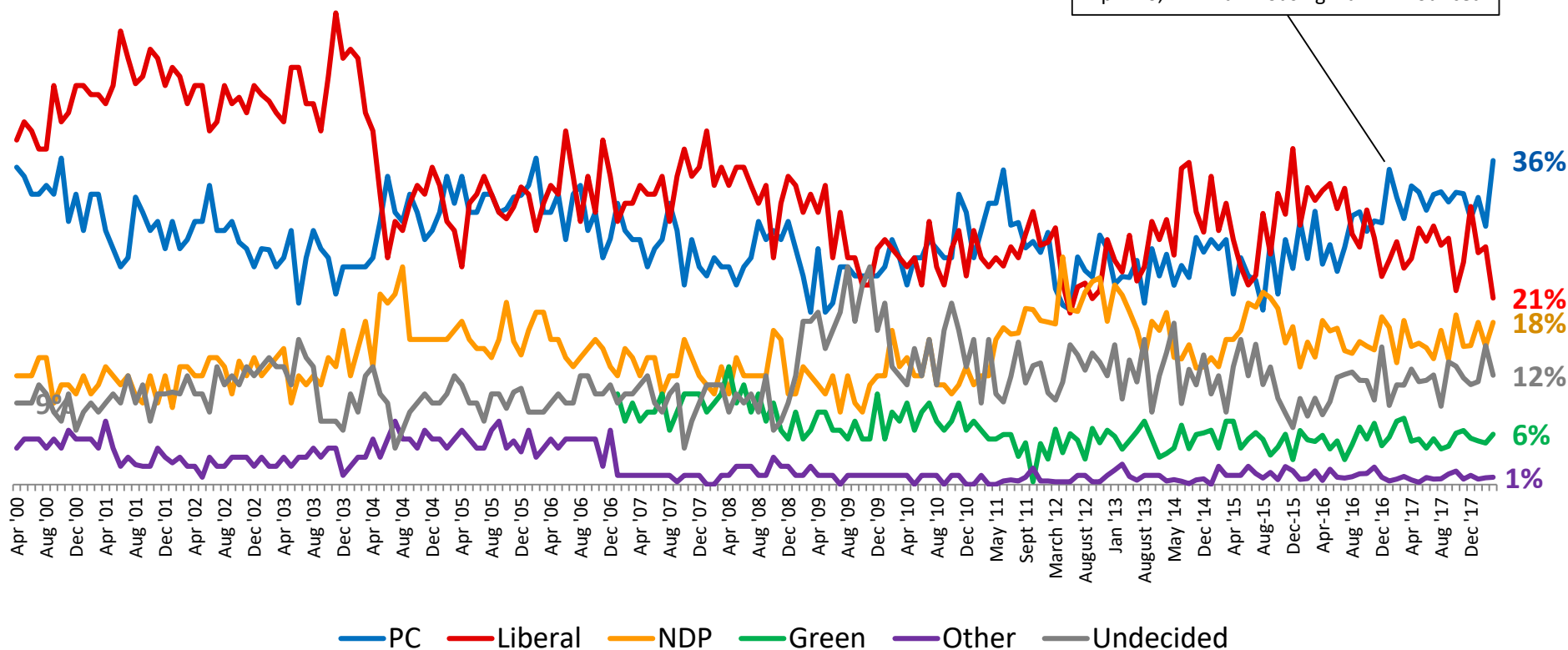
Q

If a provincial election were held today, which party would you vote for: the Progressive Conservative Party, the Liberal Party, the New Democratic Party, the Green Party or another party?

... In that case, which party's candidate do you lean toward slightly? [**Vote + Lean**]

[asked of all respondents; n=600]

March 2, '17: 'Fair Hydro Plan' Announced
April 20, '17: 'Fair Housing Plan' Announced

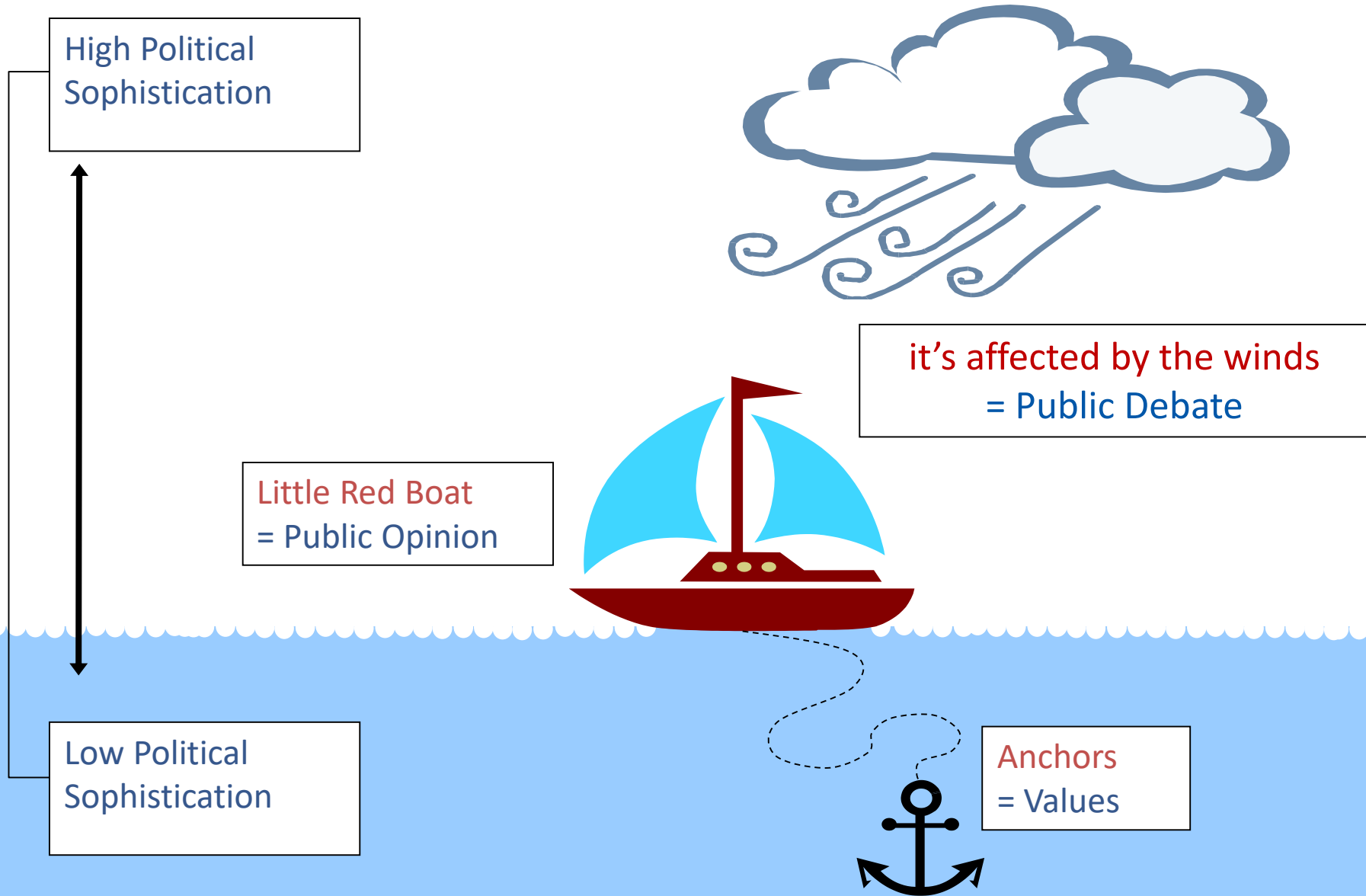


(Current data: Phone March 2018)

Note: 'Refused/Would not vote' not shown

Taking the Mystery out of Public Opinion

Public Opinion is Dynamic

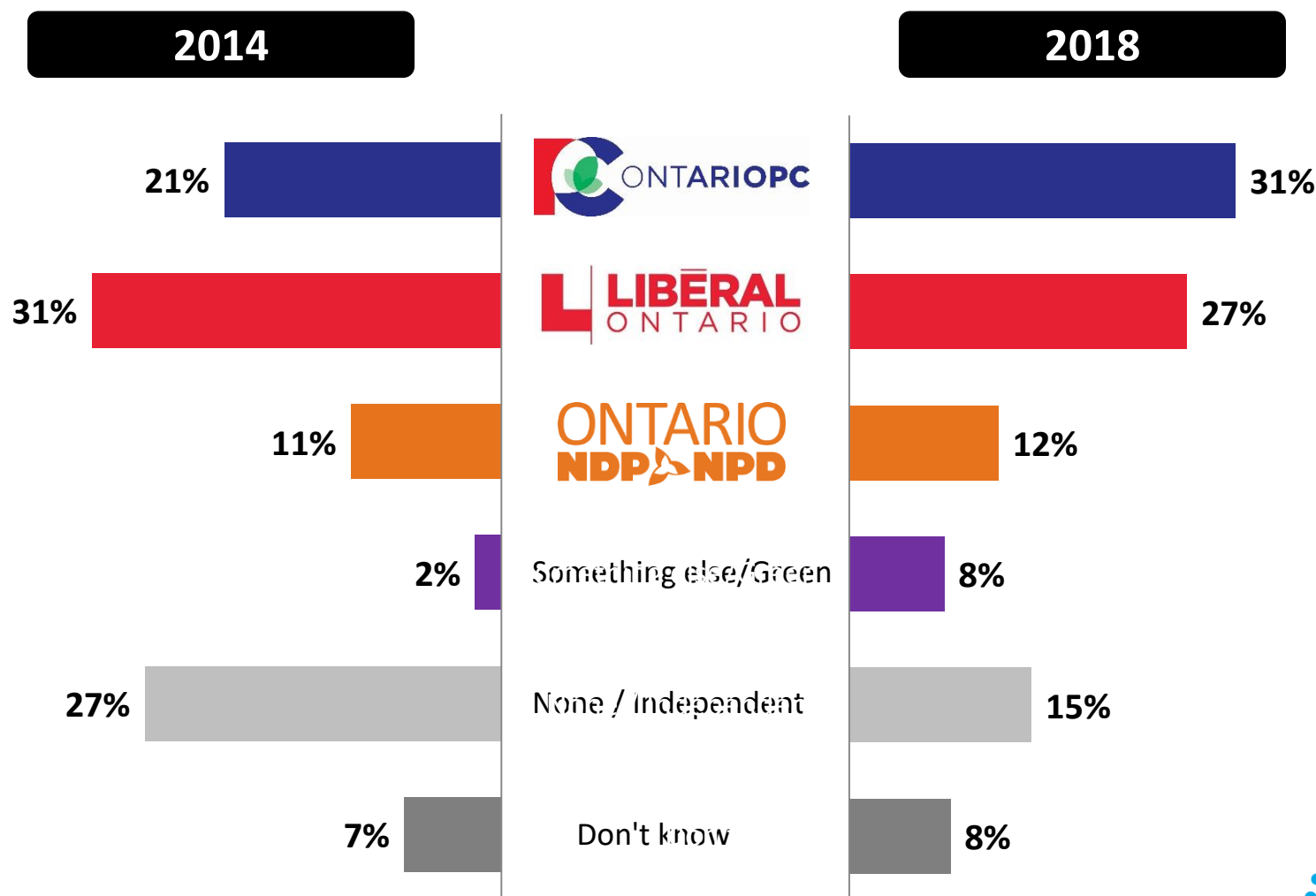


Diving Deeper

Party ID: Partisanship up significantly overall, with a 10-point gain for the PCs specifically

Q

Thinking about politics in Ontario, generally speaking, do you usually think of yourself as [RANDOMIZE PARTIES]: a Progressive Conservative, a Liberal, a New Democrat, Green*, or something else or none of these?



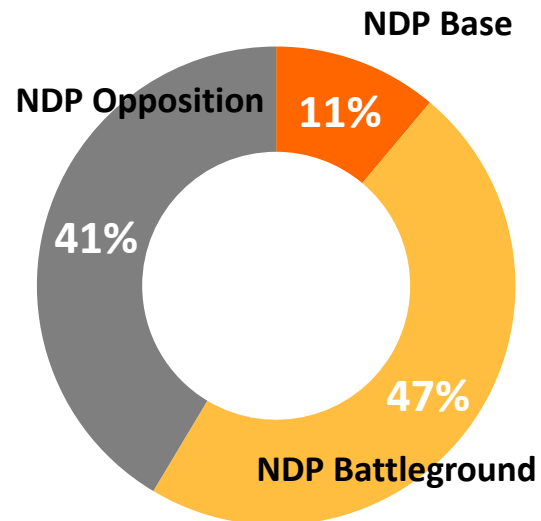
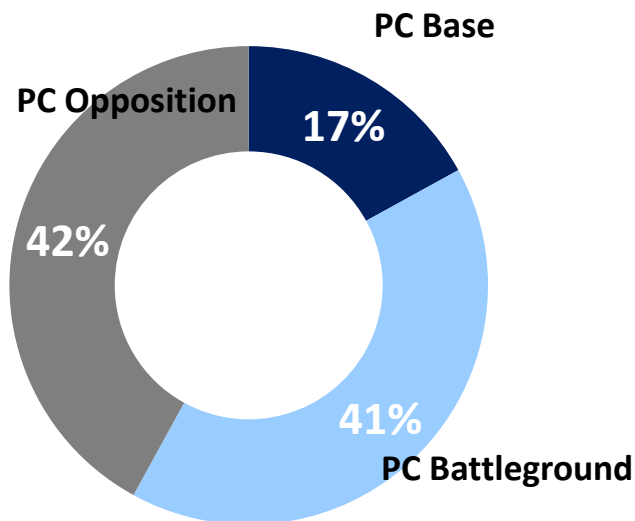
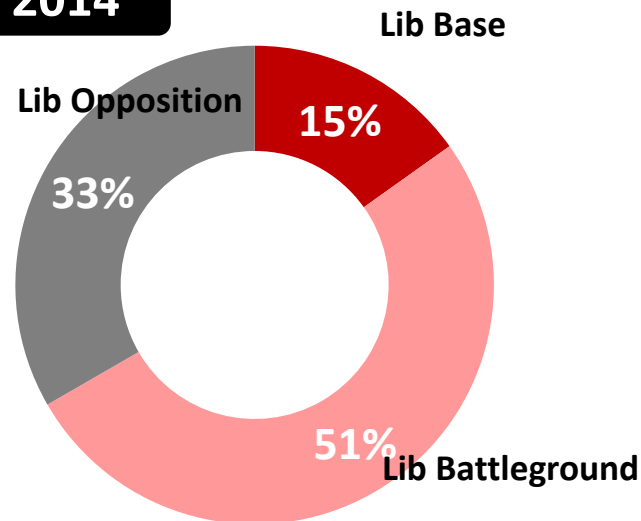
(Current data: Phone March 2018)

*[2014] Green was not given as a separate option.

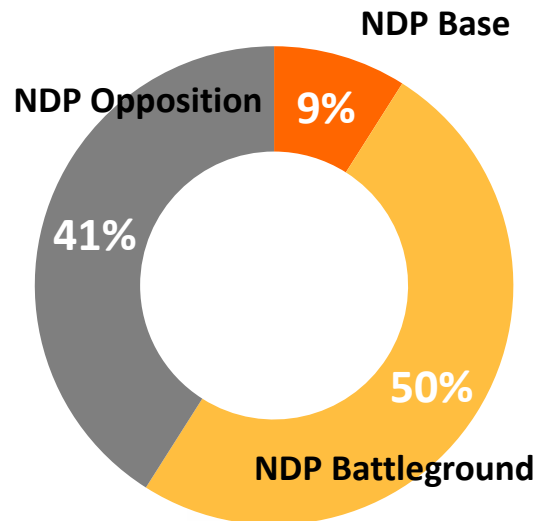
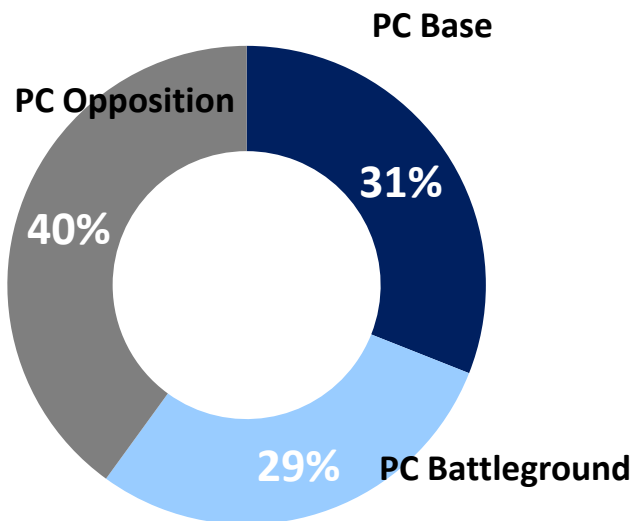
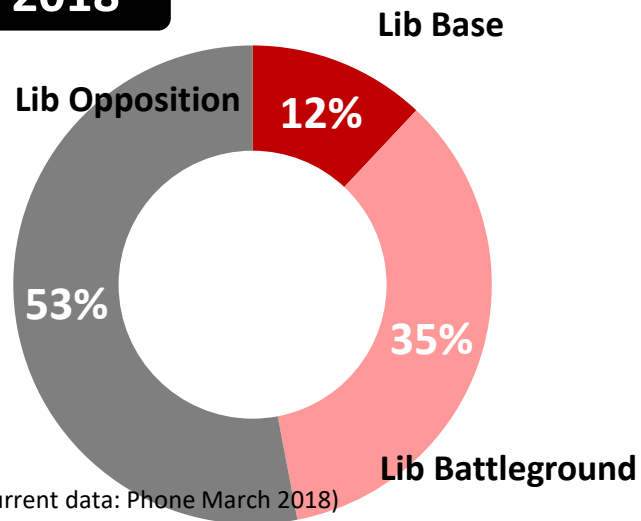
Party Voter Pools: Liberal and NDP Bases fairly steady, while PC Base almost doubled; Liberal Opposition up 20 points¹²

[Based on respondents' vote choice, second choice, and their likelihood to switch to their second choice]

2014

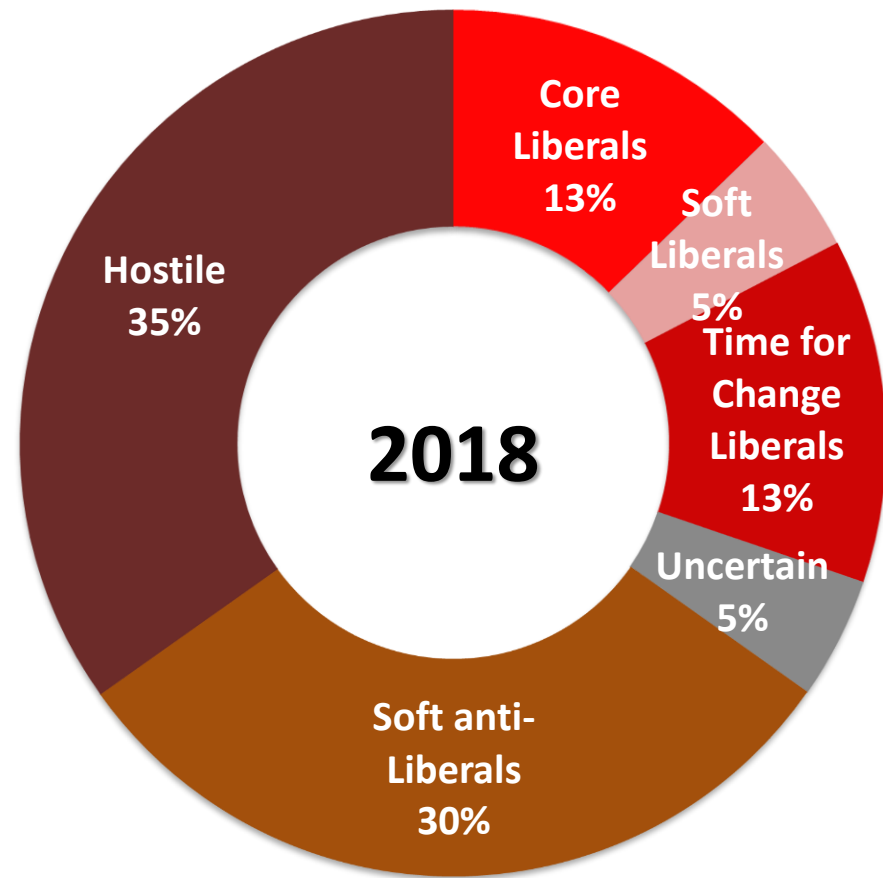
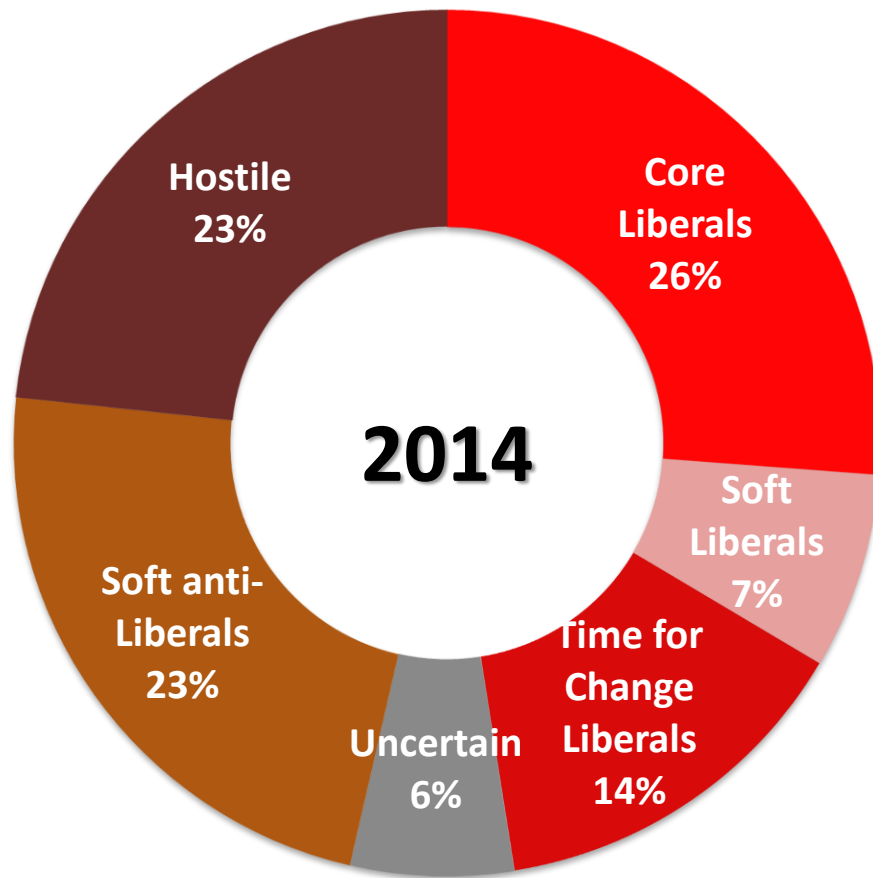


2018



(Current data: Phone March 2018)

Time for Change Segmentation: Core Liberals are down 50%, along with a 12-point gain in Hostile

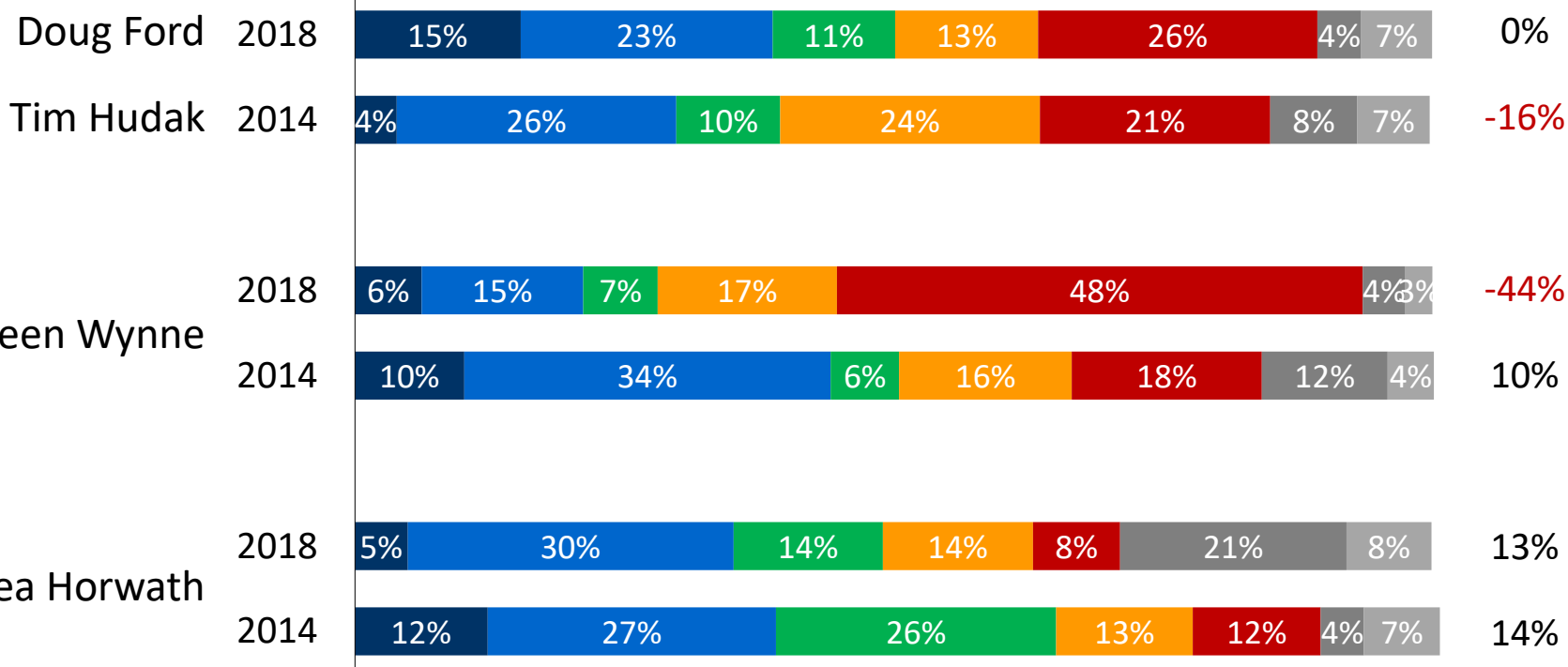


Leader Favourability: Very unfavourable view of Wynne has more than doubled; Ford fares better than Hudak

Q

Now, I would like to read you the names of several individuals who have been mentioned in the news recently. For each one, please tell me whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just say so...

Net Favourability



Very favourable

Neutral/Neither favourable nor unfavourable

Very unfavourable

Don't know

Somewhat favourable

Somewhat unfavourable

Do not recognize

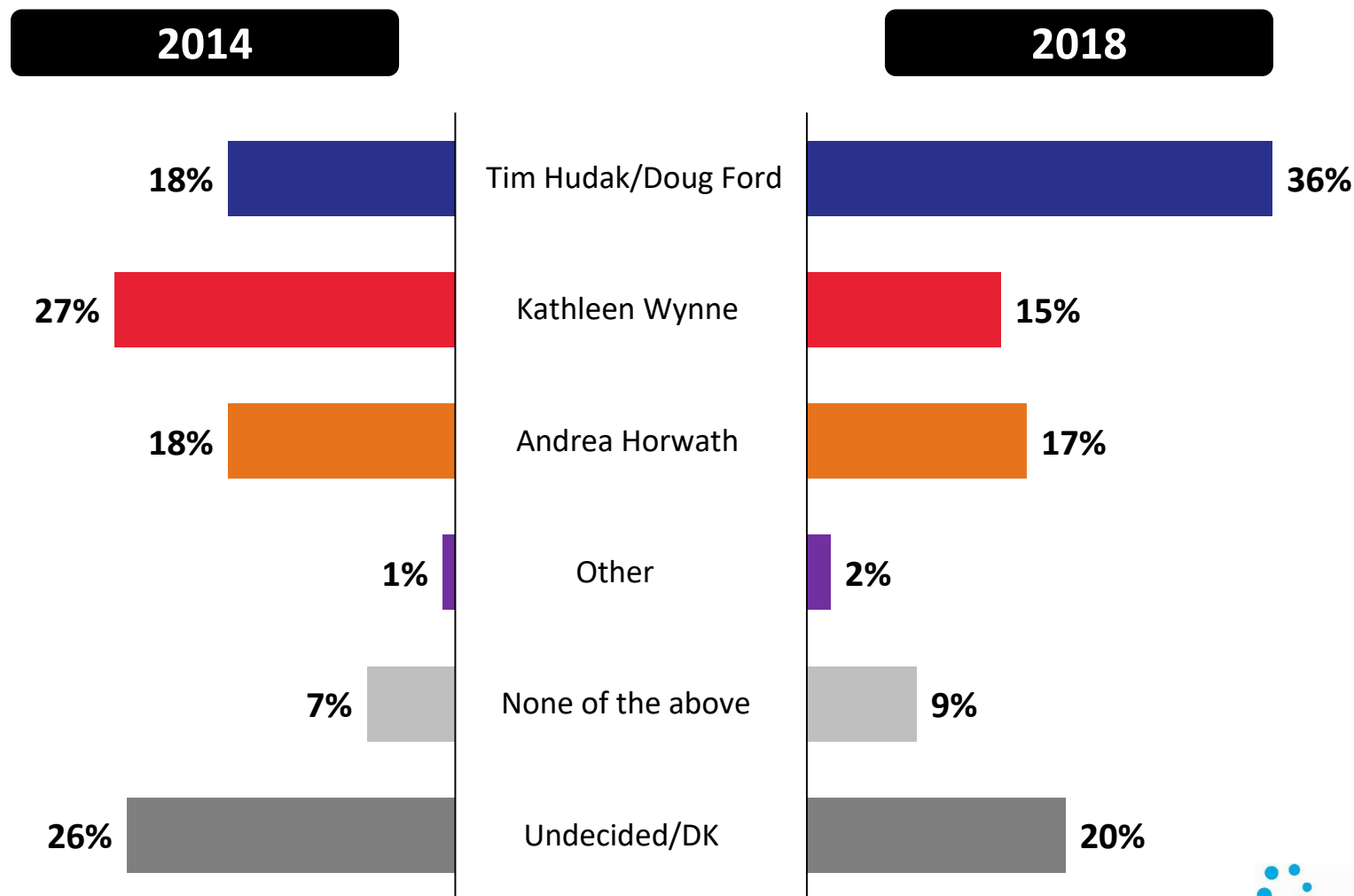
(Current data: Phone March 2018)

Note: 'Refused' not shown

Best Premier: Ford 20-pts higher than Wynne (and twice as high as Hudak); Wynne drops by almost half

Q

Which of the following leaders would make the best Premier of Ontario?



(Current data: Phone March 2018)

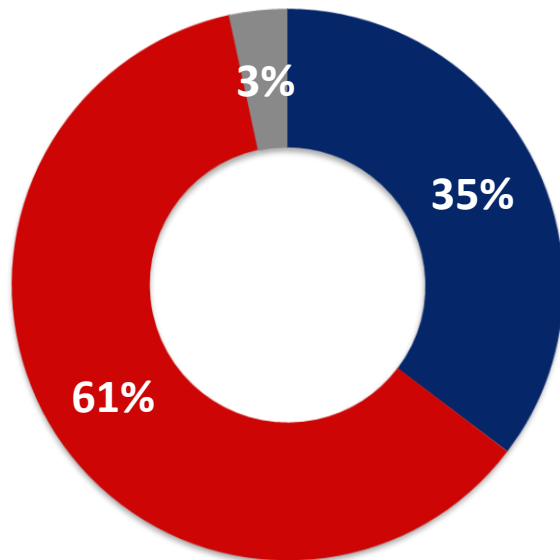
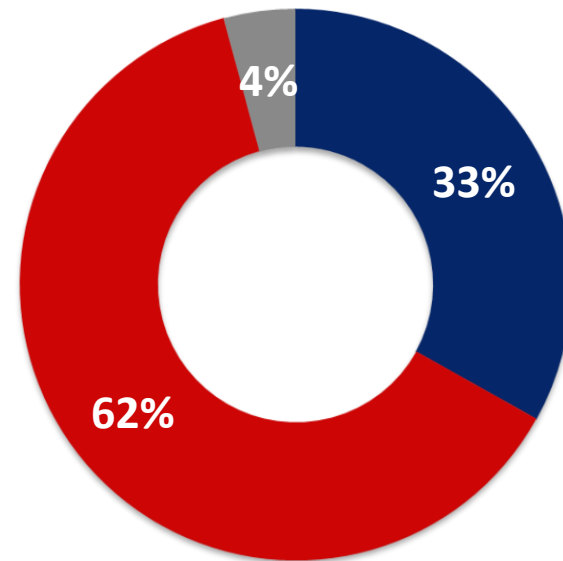
Note: 'Refused' / "would not vote" not shown

Potential for Change?

Potential for Change: As in 2014, only a third of voters say they've made up their mind

Q

[2014: If there is a spring election / 2018: Regarding the June election], which point of view is closest to your own?

2014**2018**

■ I have heard all I need to make up my mind in this election

■ I would like to hear more before I finally make up my mind in this election

■ Don't know

(Current data: Phone March 2018)

Note: 'Refused' not shown

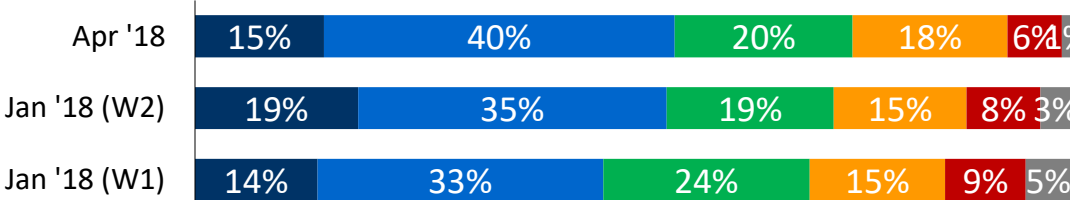
The Impact of Economic Alienation

Economic Values Tracking: Drop in perception that every year seems more difficult, that people can't get ahead

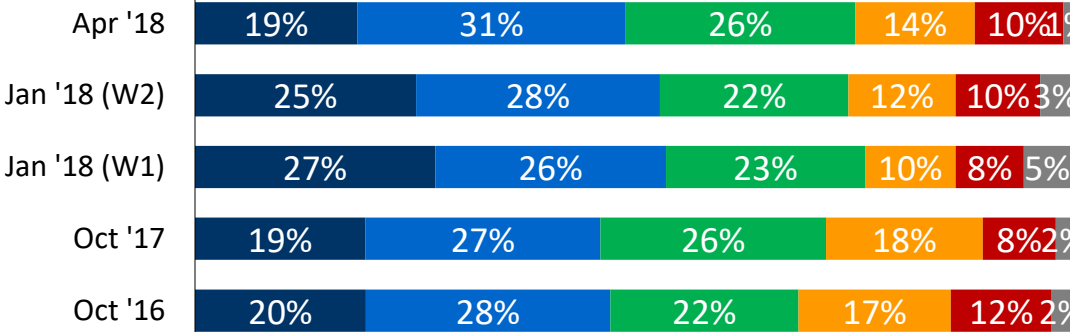


Do you agree or disagree with the following statements?

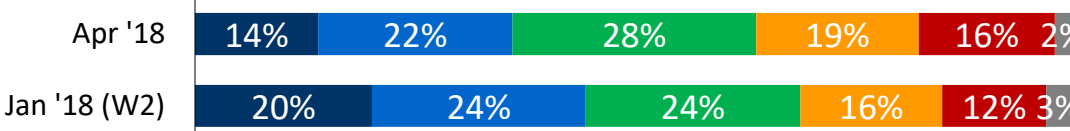
Here in Ontario, you can be anything if you are willing to work for it.



No matter how hard I work, every year it seems more difficult to get by



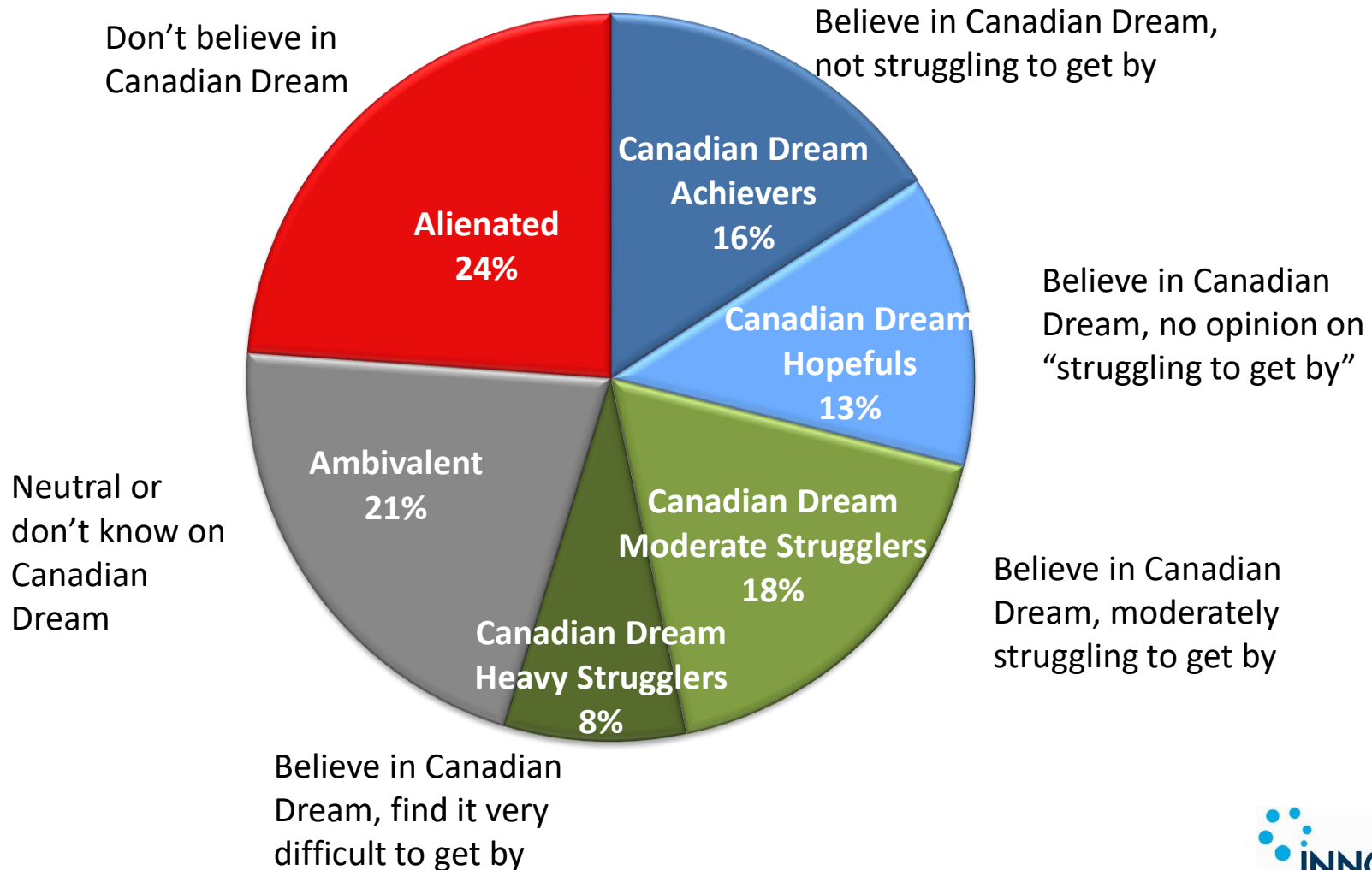
The way things work in Ontario, people like me just can't get ahead in life.



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

Economic Alienation Segmentation: Almost half are either Ambivalent or Alienated 20

Based on the two economic alienation questions – Agree/Disagree “Here in Ontario, you can be anything if you are willing to work for it” and “No matter how hard I work, every year it seems more difficult to get by” – we group respondents who share common sets of values to better understand the motivations and needs of voters.



Vote by Economic Alienation Segmentation: Heavy Strugglers most likely to vote PC

Provincial Combined Vote BY Economic Alienation Segmentation

	Overall	Canadian Dream Achievers	Canadian Dream Hopefuls	Canadian Dream Moderate Strugglers	Canadian Dream Heavy Strugglers	Ambivalent	Alienated
Liberal	26%	38%	33%	20%	11%	31%	21%
PC	37%	31%	40%	39%	60%	33%	33%
NDP	18%	18%	15%	22%	18%	16%	21%
Green	6%	2%	4%	6%	5%	5%	9%
Other	1%	2%	0%	0%	1%	0%	1%
Undecided DK	10%	8%	8%	10%	5%	11%	11%
Would not vote/None	3%	1%	0%	3%	0%	4%	5%

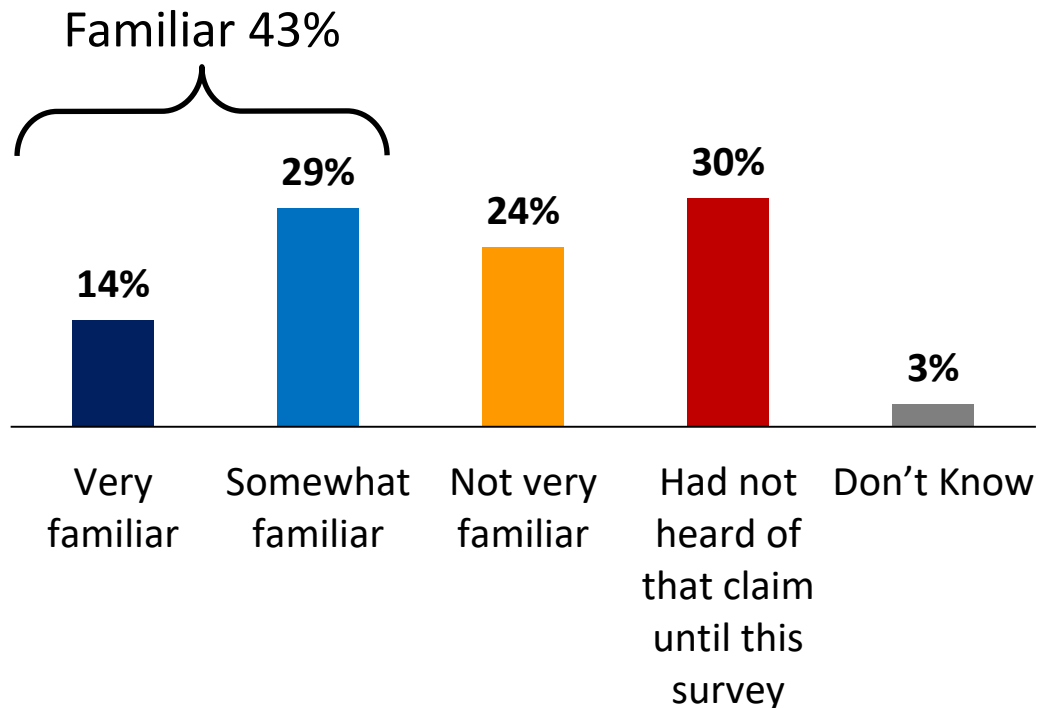
The Winds of Public Debate: Hash Story

Familiar with hashish story: 43% familiar with the story; Liberal identifiers, Torontonians and feminists most familiar

Q

In 2013, the Globe and Mail published a story claiming that Doug Ford sold hashish for several years in 1980s. How familiar are you with the claim that Doug Ford sold hashish?

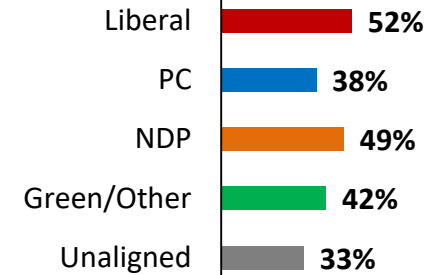
[asked of all respondents; n=600]



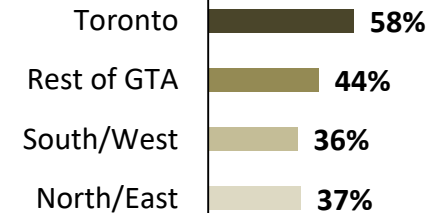
Sample Breakdown ►►

Those who say "familiar"

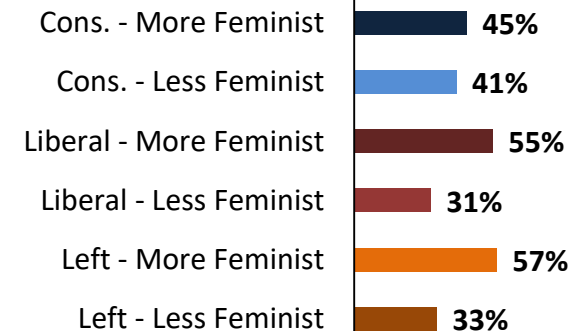
Party ID



Region



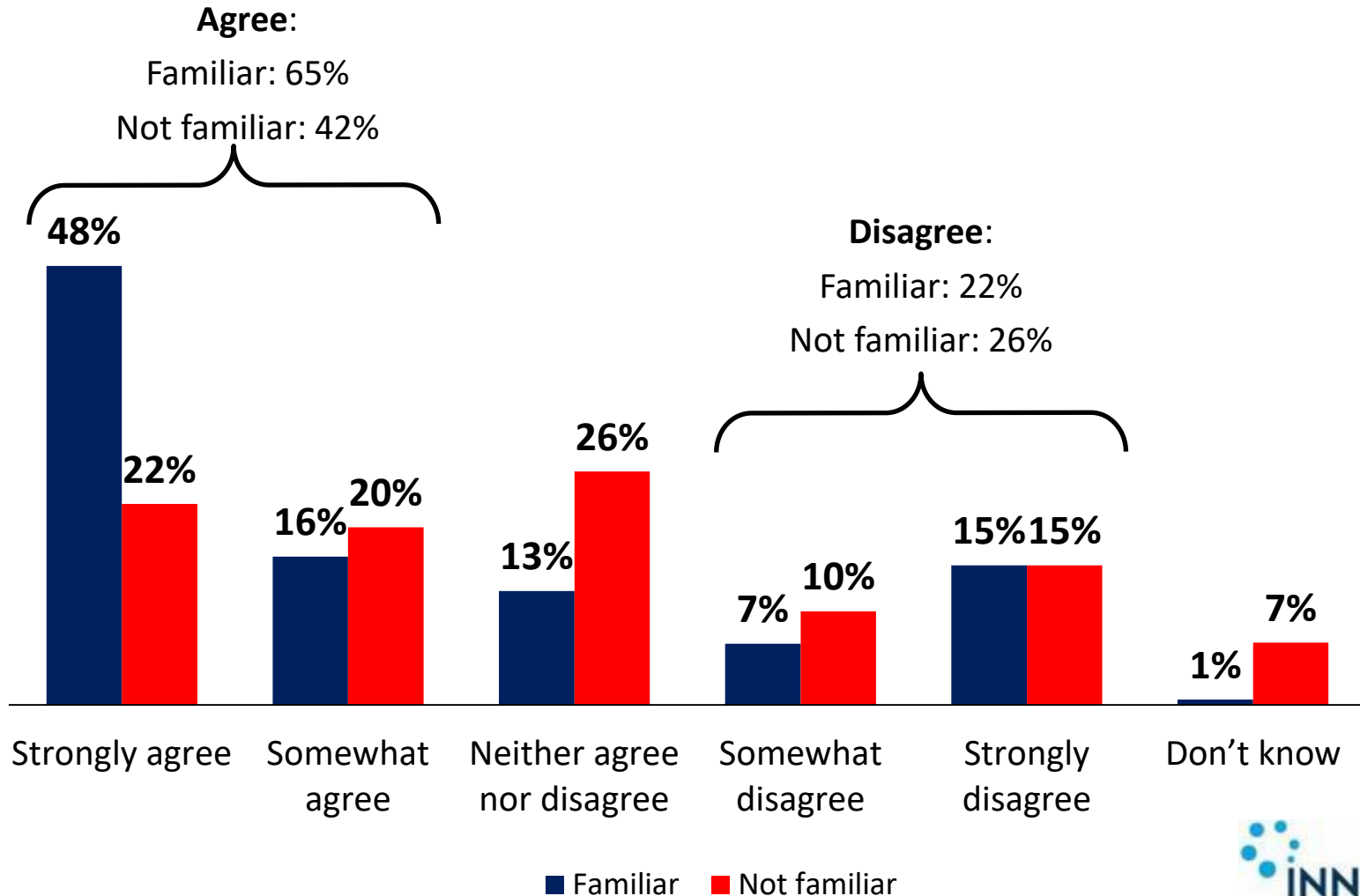
Value Clusters



Suitability by Awareness: Those familiar with the hashish story much more likely to say Ford unsuitable to be Premier

Q

For each of the following statements please indicate if you agree or disagree: *I feel Doug Ford has a history of poor choices and bad behaviour that makes him unsuitable to be Premier of Ontario* BY Familiarity with hashish story [asked all respondents; n=600]

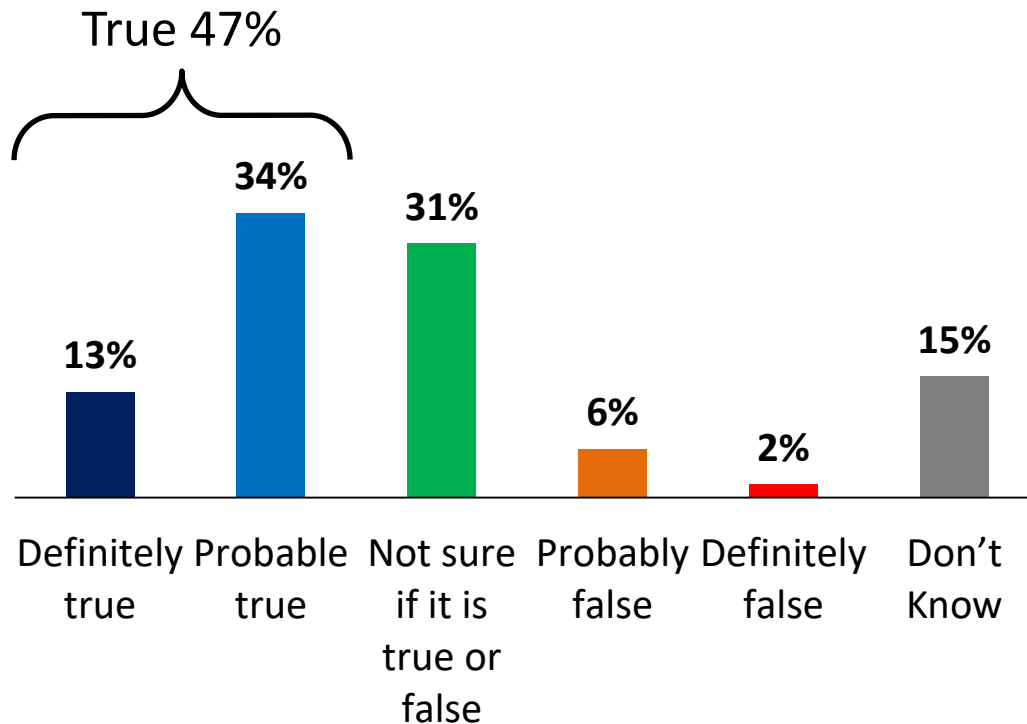


Credibility of story: Nearly half (47%) believe the story; most credible among Liberals, NDP and feminist groups

Q

In your opinion is the report by the Globe and Mail that Doug Ford sold hashish likely true or false?

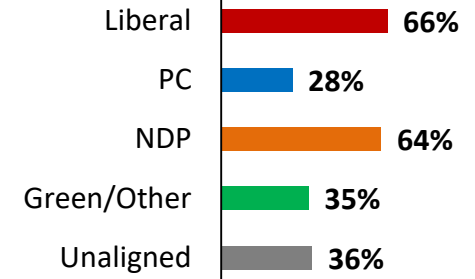
[asked of all respondents; n=600]



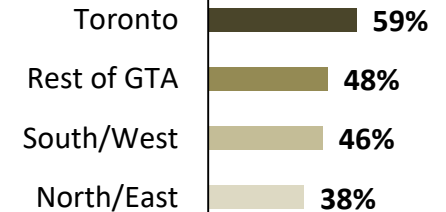
Sample Breakdown ►►

Those who say "true"

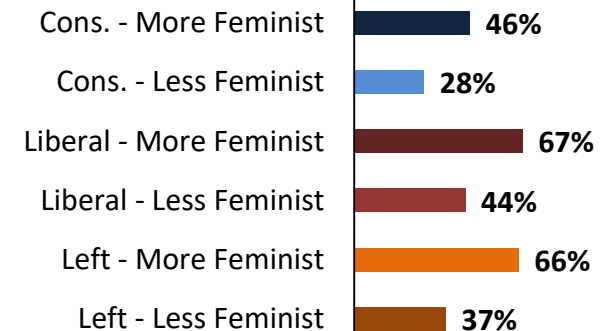
Party ID



Region



Value Clusters



Credibility by PC Voter Pool: All segments think the report is likely to be true, strongest sentiment among opposition

26

“...likely true or false?” BY PC Voter Pool (Collapsed)

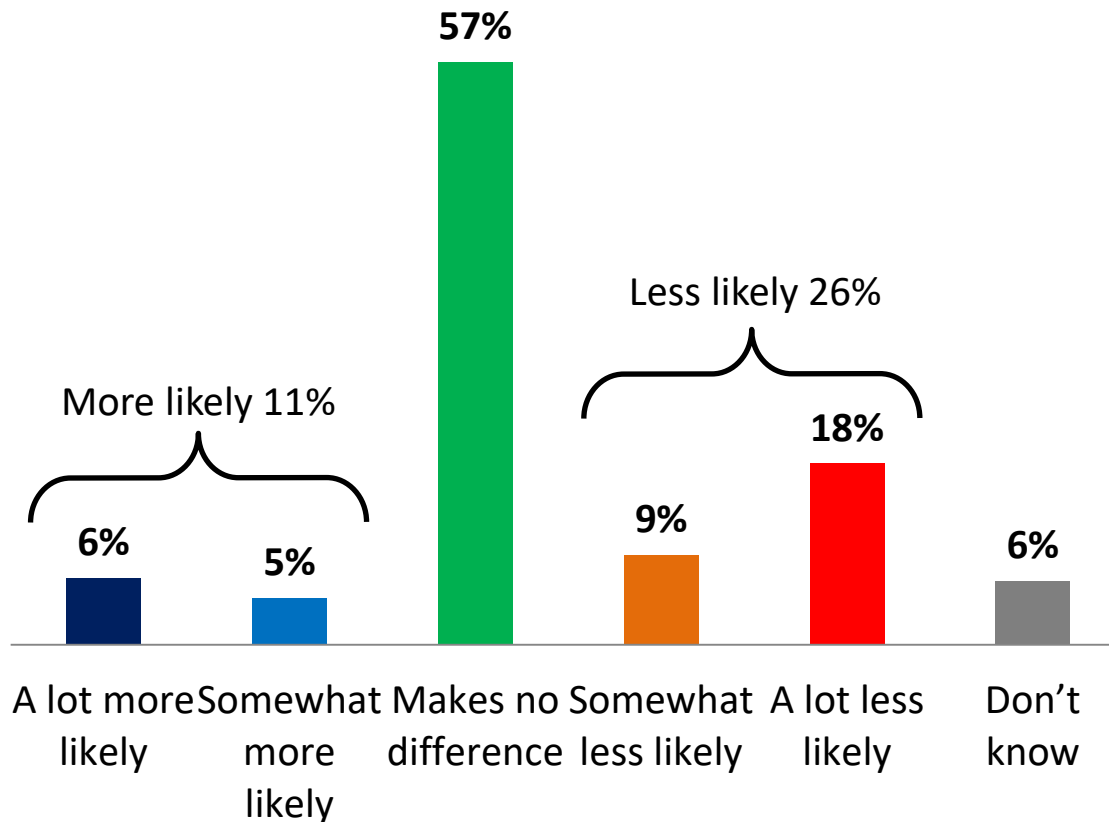
	Core ON PC	Battleground ON PC	Opposition
Definitely true	2%	8%	23%
Probable true	23%	29%	45%
Not sure/Don't know	59%	56%	30%
Probably false	12%	6%	2%
Definitely false	5%	0%	0%
TRUE	25%	37%	68%
FALSE	16%	7%	2%
NET TRUE	+9%	+31%	+65%

Reported Impact: For most (57%), the hashish story makes no difference on their vote in the upcoming election

Q

Does the report by the Globe and Mail that Doug Ford sold hashish for several years in the 1980s leave you more or less likely to vote PC in the upcoming election?

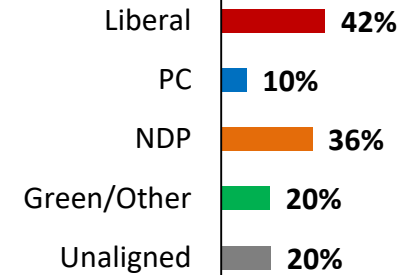
[asked of all respondents; n=600]



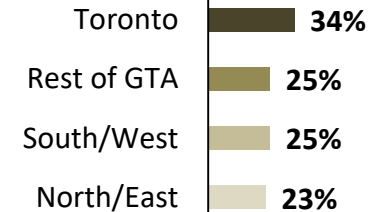
Sample Breakdown ▶▶

Those who say "LESS likely"

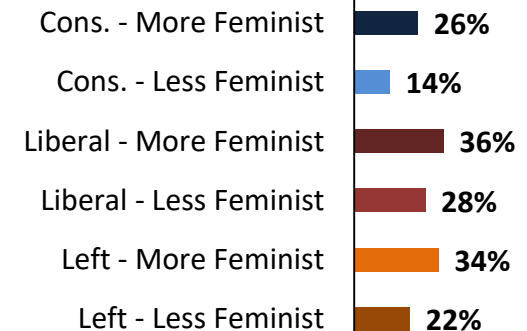
Party ID



Region



Value Clusters



Likelihood to vote PC by PC Voter Pool: Core PCs are slightly more likely to vote PC and Battleground are slightly less so²⁸

“Does the report make you more or less likely to vote PC ...” BY PC Voter Pool (Collapsed)

	Core ON PC	Battleground ON PC	Opposition
A lot more likely	13%	5%	3%
Somewhat more likely	1%	9%	4%
Makes no difference	76%	49%	47%
Somewhat less likely	3%	13%	10%
A lot less likely	1%	12%	32%
Don't know	5%	12%	4%
MORE LIKELY	15%	14%	7%
LESS LIKELY	5%	25%	42%
NET LIKELY	+10%	-10%	-35%

The Winds of Public Debate: Overall Government Awareness

Ontario Government Tracking: recall is up month-to-month and reaction turns sharply negative ³⁰



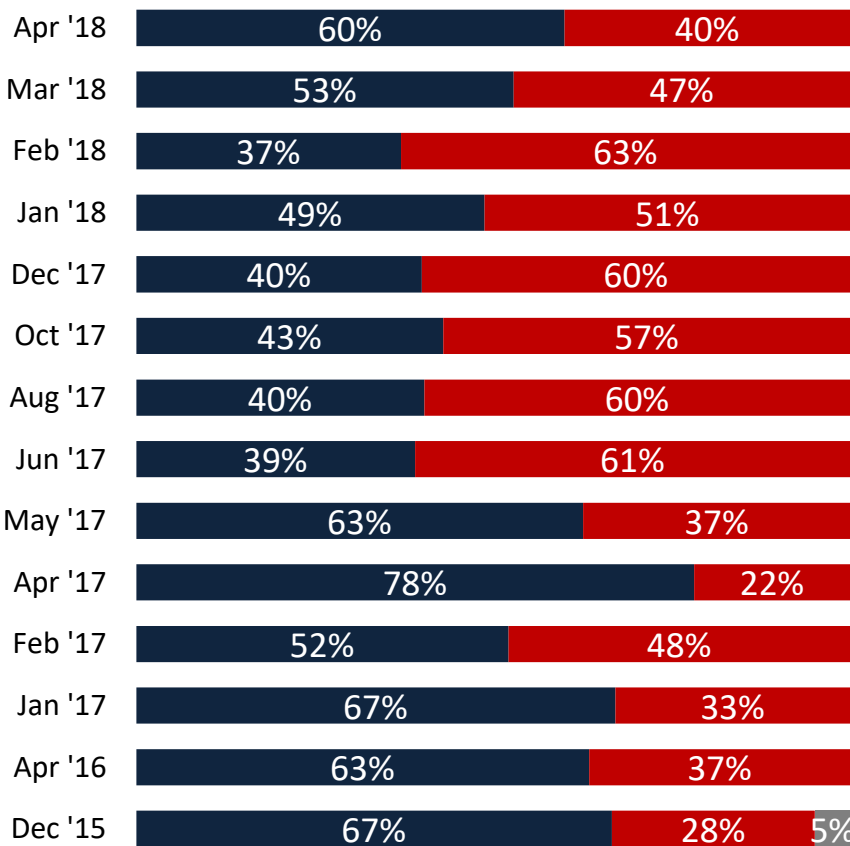
Have you read, seen or heard anything about Ontario's Premier Kathleen Wynne and the provincial government in the last few days?

[asked of all respondents in Ontario, n=600]

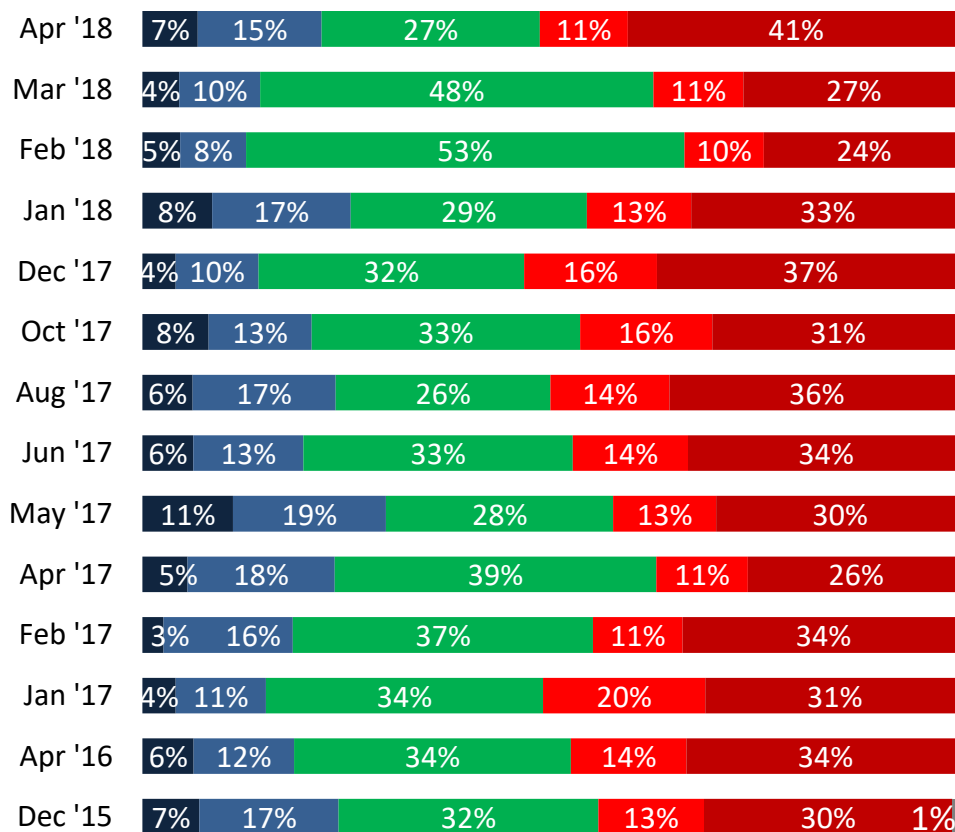


Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Ontario's Premier Kathleen Wynne and the provincial government?

[respondents who have RSH, n=317]



■ Yes ■ No ■ Don't know



■ A lot more favourable ■ Somewhat more favourable
 ■ Made no difference ■ Somewhat less favourable
 ■ A lot less favourable ■ Don't know

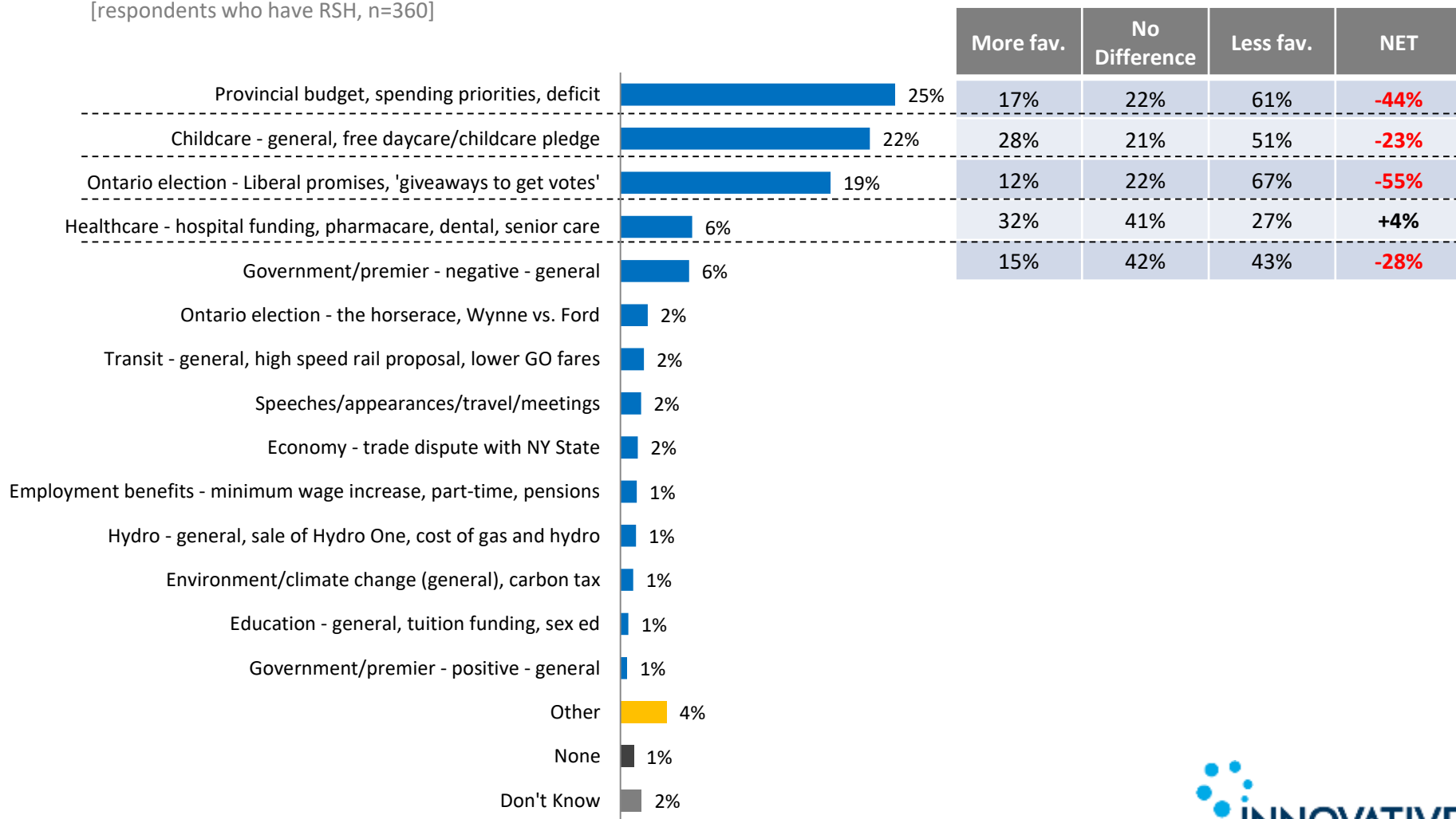
RSH and Impact: most RSH about budget, childcare, promises;³¹ most negative impact items were budget, election promises

Q

And what have you read, seen or heard about Ontario's Premier Kathleen Wynne and the provincial government in the last few days? Please be specific.

[respondents who have RSH, n=360]

Impact by RSH



Note: "Refused" (1%) not shown. "Impact" only shown for responses with percentage higher than 5%.

The Winds of Public Debate: Budget

RSH Budget Tracking: 59% have RSH about the provincial budget; PCs are more likely to recall it than Liberals

33

Q

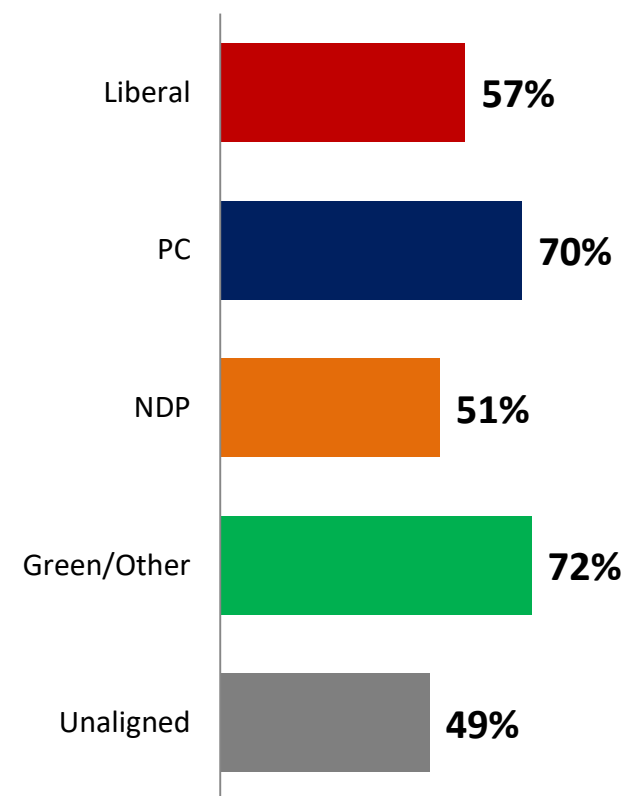
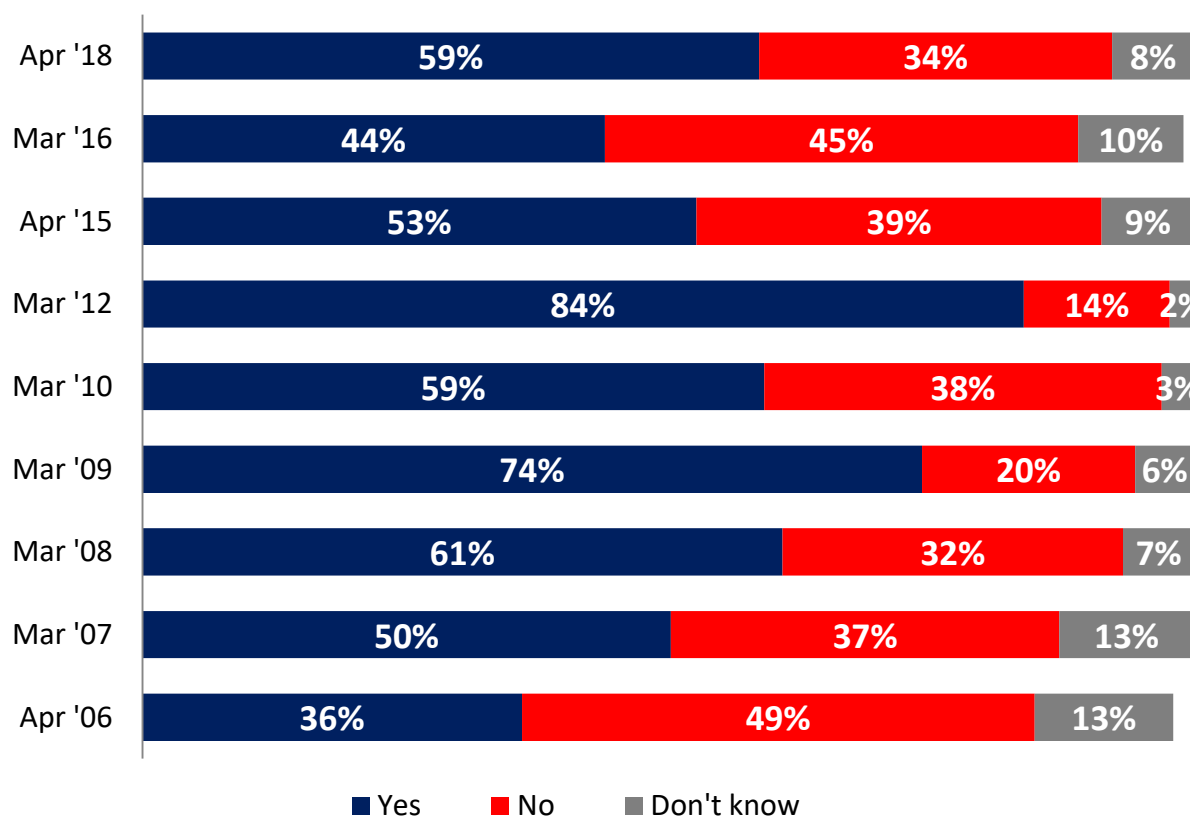
Have you read, seen or heard anything about the recent provincial budget that was presented in the Legislature on March 28, 2018?

[asked of all respondents, n=600]

Sample Breakdown ►►

Those who say "Yes"

Provincial Party ID (Apr '18)



RSH Impact Tracking: 24% of those who are aware of the budget say it left them feeling more favourable

34

Q

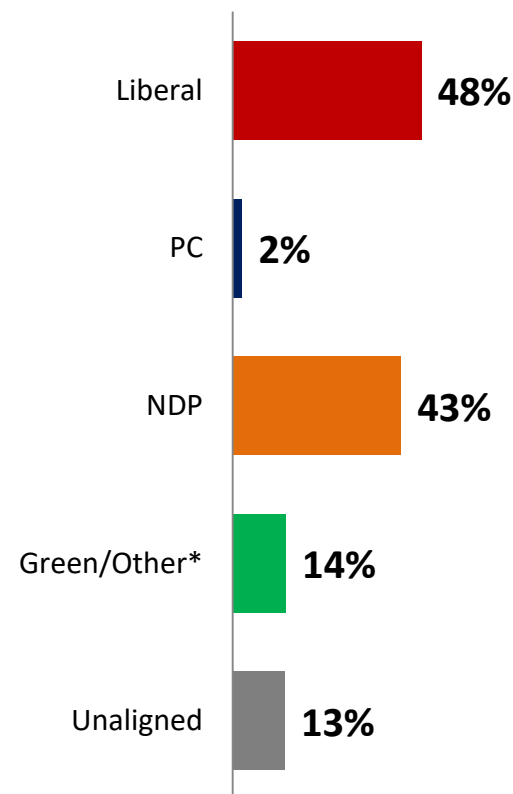
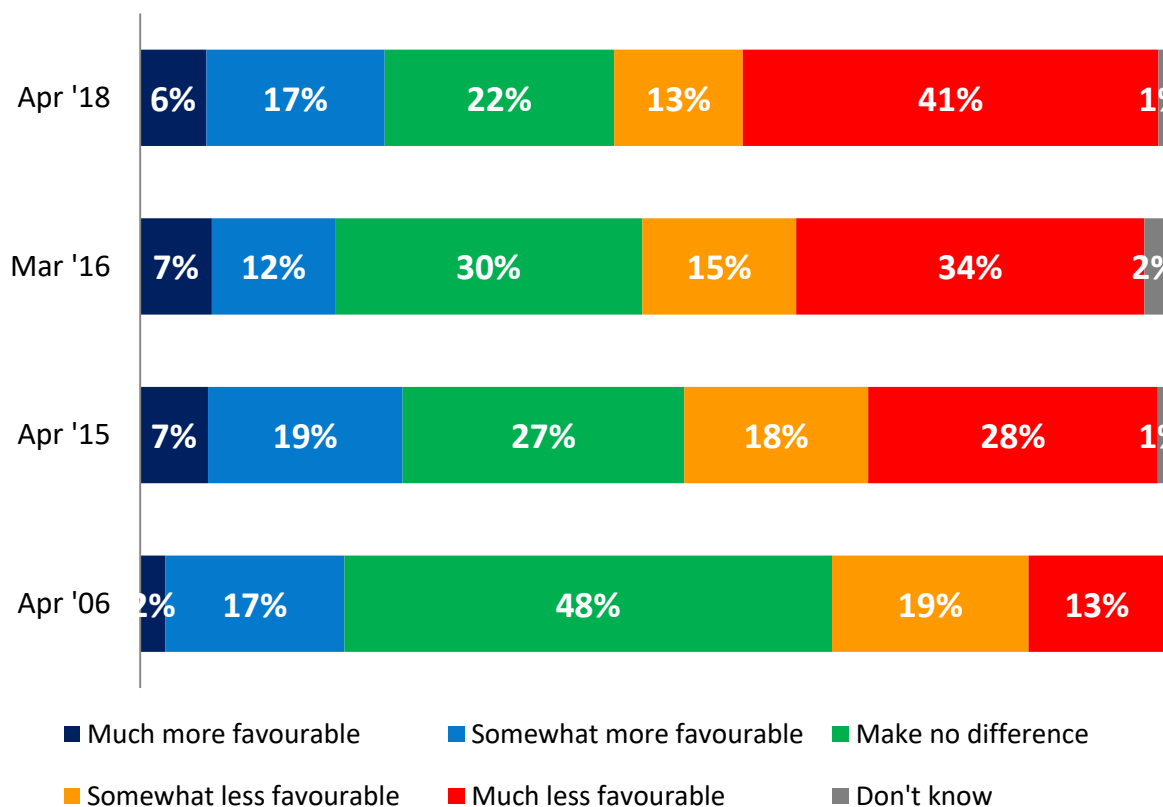
Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, or a lot less favourable towards the provincial Liberal government?

[asked of those aware of budget, n=352]

Sample Breakdown ►►

Those who say "More Favourable"

Provincial Party ID (Apr '18)



Note: "Don't know" is not provided as an option in Apr '06.

*Green/Other Aware group, n=14 should be taken as directional only.

Budget Satisfaction Tracking: 32% are satisfied with the budget, but “*very dissatisfied*” is at its highest point since ‘06

Q

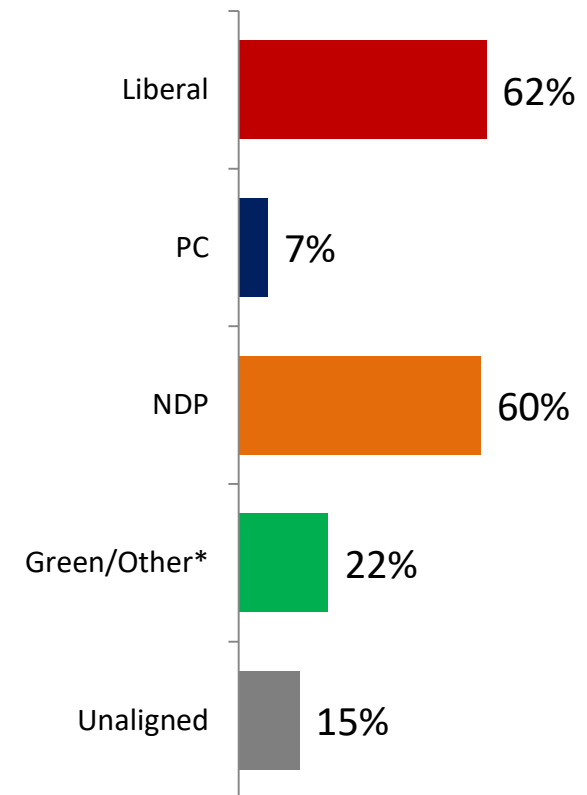
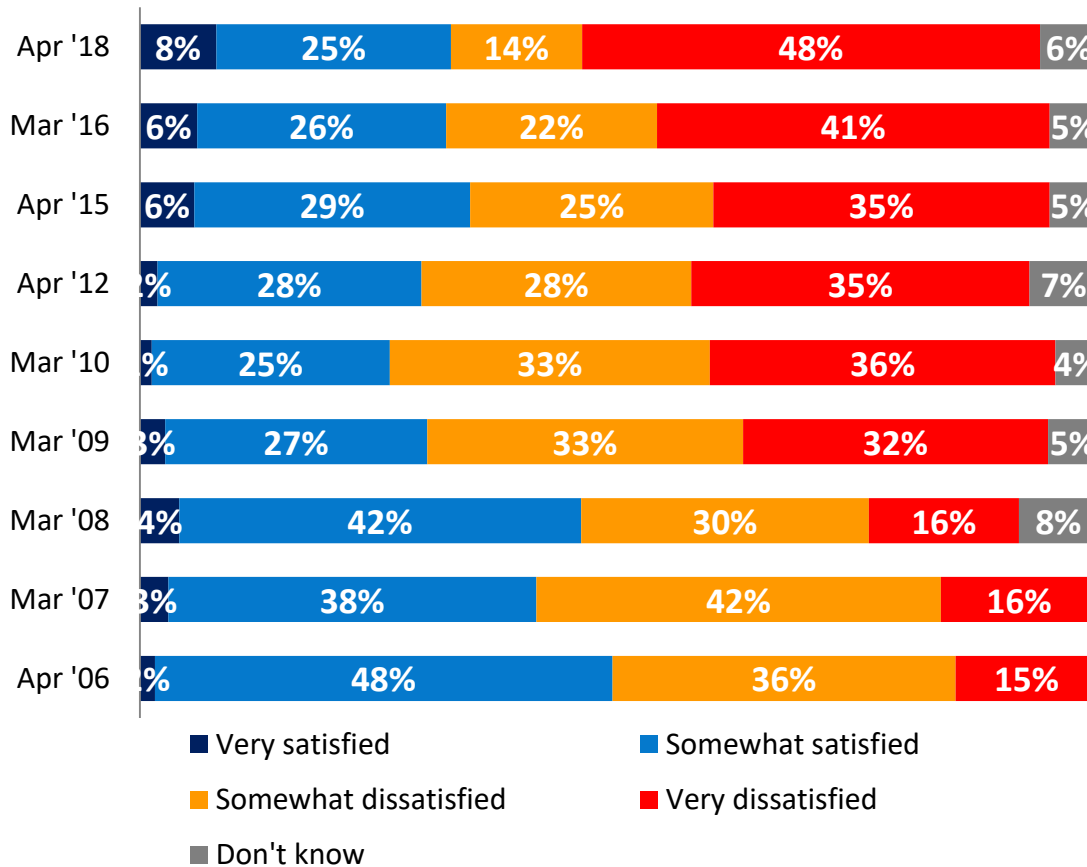
In general, how satisfied are you with the provincial budget?

[asked of those aware of budget, n=352]

Sample Breakdown ►►

Those who say “Satisfied”

Provincial Party ID (Apr '18)



Note: “Don’t know” is not provided as an option in Apr '07 and Apr '06.

*Green/Other Aware group, n=14 should be taken as directional only.

Doug Ford's PCs are in the driver's seat

1.

Anger at the Liberals appears to have solidified this winter, leaving the Liberals with a much smaller voter pool compared to the last election with a much more unpopular leader.

2.

Ford is polarising, but that still leaves him in a stronger position than Hudak before the 100,000 jobs issue - and a much better position than Wynne.

3.

The NDP have lots of second choice support and Horwath has a positive image, but they need the other two parties to fail before voters look to them.

Appendices

Online Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from April 2nd to April 9th, 2018 with tracking drawn for our monthly omnibus.
- This online survey of 920 adult Ontarians is drawn from a larger monthly omnibus survey of 2,474 adult Canadians using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Survey Sampling International (SSI), a leading provider of online sample. The Ontario results shown are weighted to n=600 based on Census data from Statistics Canada.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language 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. 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.*

Online - April CTM Ontario Weights: 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	64	7.0%	82	13.7%
Males 35-54	127	13.8%	110	18.3%
Males 55+	304	33.0%	96	16.0%
Females 18-34	82	8.9%	84	14.0%
Females 35-54	128	13.9%	116	19.4%
Females 55+	215	23.4%	111	18.6%
Toronto	219	23.8%	126	20.9%
Rest of GTA	188	20.4%	152	25.3%
South/West	234	25.4%	157	26.2%
North/East	279	30.3%	165	27.6%



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