



Public Opinion Research

Canada This Month: Ontario Focus

Values and Attitudes In-depth

Field Dates: May 7th to May 11th, 2018

Sample Size: n=1000

Methodology

- **Note:** The results presented in this deck are analysis of the results from a larger survey. The complete release on that survey, along with full results and all questions asked, is available at www.innovativeresearch.ca/insights
- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from May 7th to May 11th, 2018 with tracking drawn for our monthly omnibus.
- This online survey of 1,010 adult Ontarians is drawn from a larger monthly omnibus survey of 2,240 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=1,000 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.*

May CTM Ontario Weights: Age, gender, and region

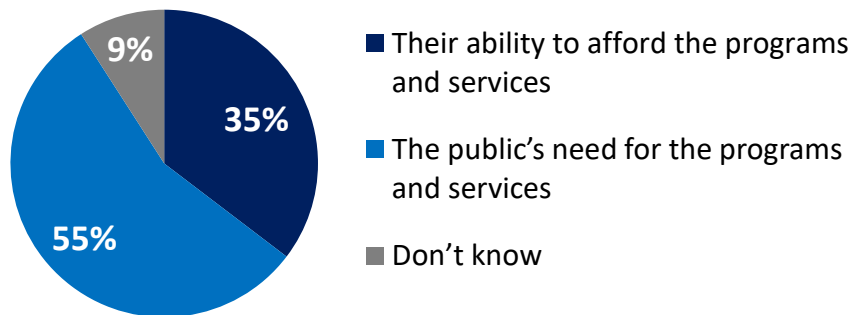
Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported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

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	126	12.5%	137	13.7%
Males 35-54	157	15.5%	183	18.3%
Males 55+	234	23.2%	160	16.0%
Females 18-34	146	14.5%	140	14.0%
Females 35-54	177	17.5%	194	19.4%
Females 55+	170	16.8%	186	18.6%
Toronto	267	26.4%	209	20.9%
Rest of GTA	225	22.3%	253	25.3%
South/West	228	22.6%	262	26.2%
North/East	290	28.7%	276	27.6%

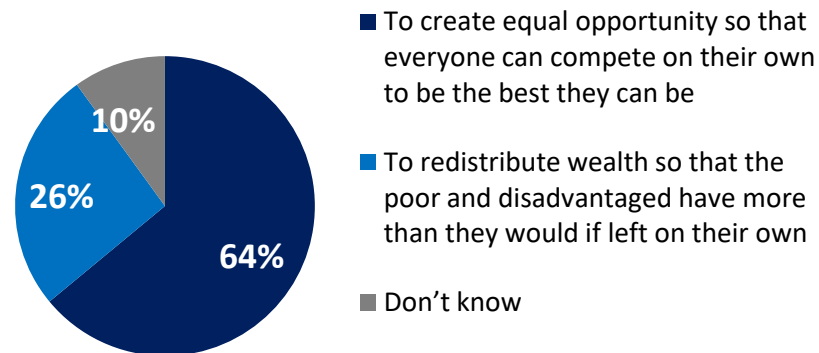
Value Clusters

Core political values: These four value statements define value cluster analysis that we can compare directly to 2014

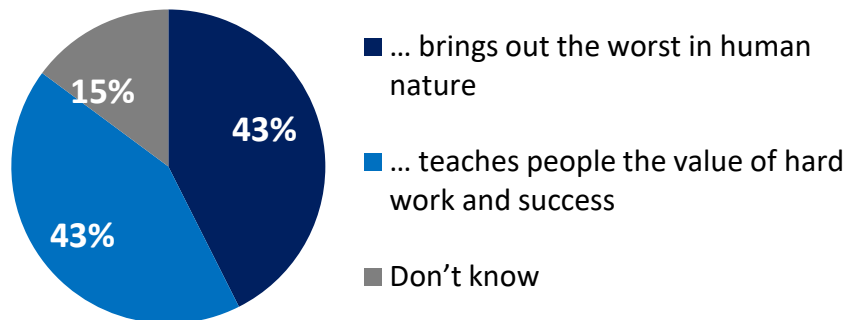
Q When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



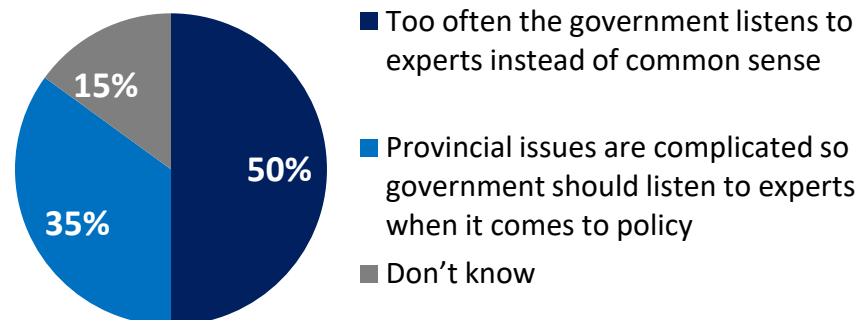
Q Is the main role of government ...?



Q Which of the following statements best describes your personal point of view? The profit system ...



Q When it comes to government decision making, which of the following statements is closest to your view?

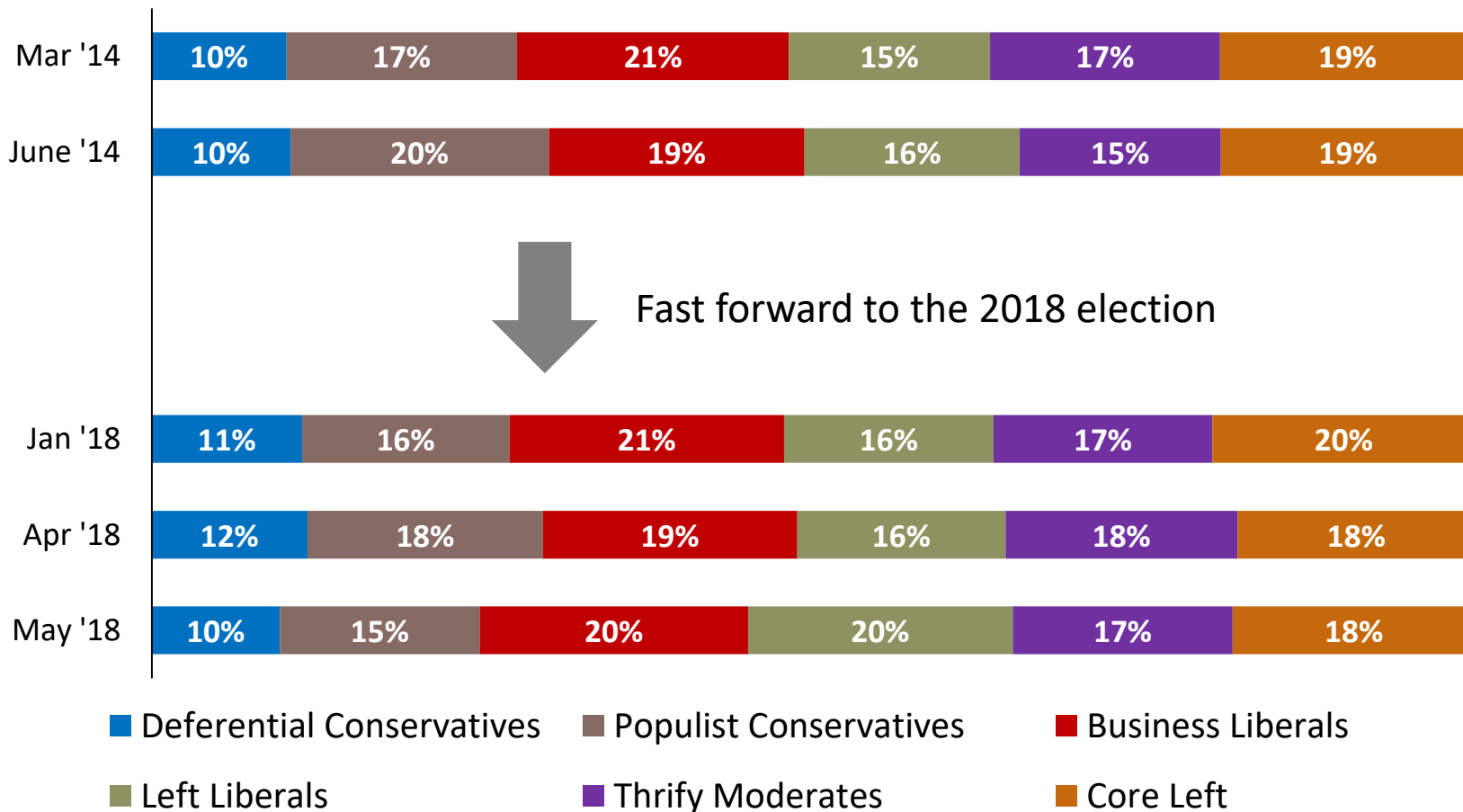


Defining value clusters

		Deferential Conser- vatives	Populist Conser- vatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Is the main role of government to ...?	Create equal opportunity	85%	98%	74%	95%	44%	0%
	Redistribute wealth	10%	0%	19%	0%	26%	93%
The profit system ...	Brings out worst in human nature	0%	0%	0%	82%	65%	86%
	Teaches value of hard work and success	95%	88%	91%	0%	9%	0%
When gov'ts make decisions on spending on programs, do you think they should base their decisions on...	Ability to afford	90%	95%	0%	0%	73%	0%
	Public need	0%	0%	97%	91%	0%	96%
When it comes to government decision making...	Rely on common sense	0%	100%	46%	57%	55%	30%
	Listen to experts	81%	0%	40%	30%	19%	54%

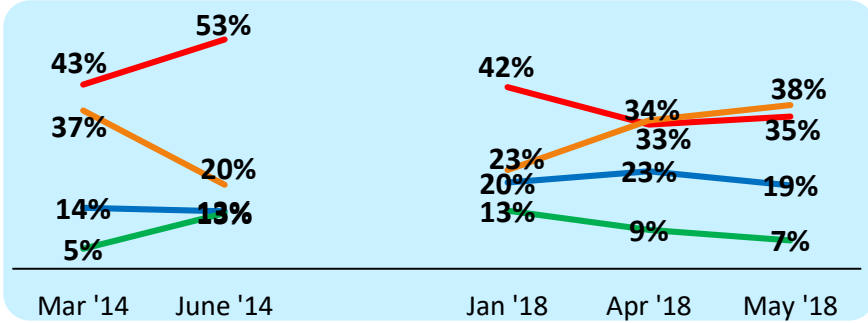
Value Clusters: Tracking over time

These clusters tracking back to the 2014 election are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

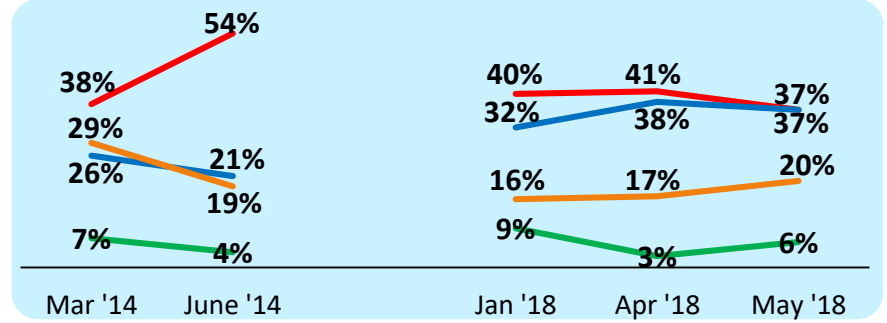


Tracking Decided Vote by Value Cluster

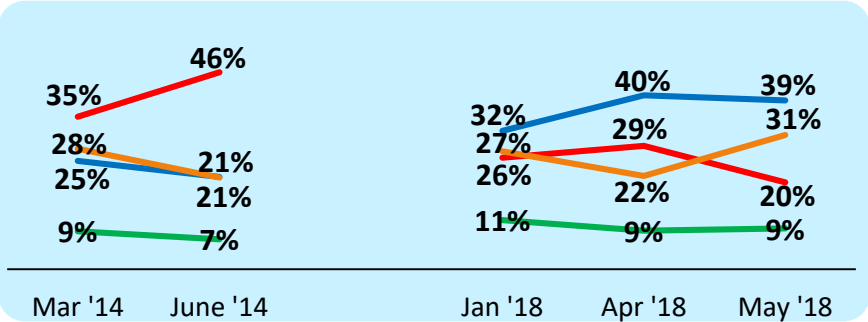
Left Liberals



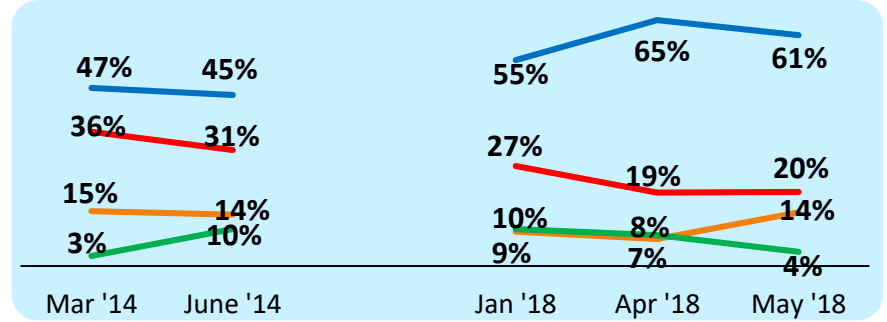
Business Liberals



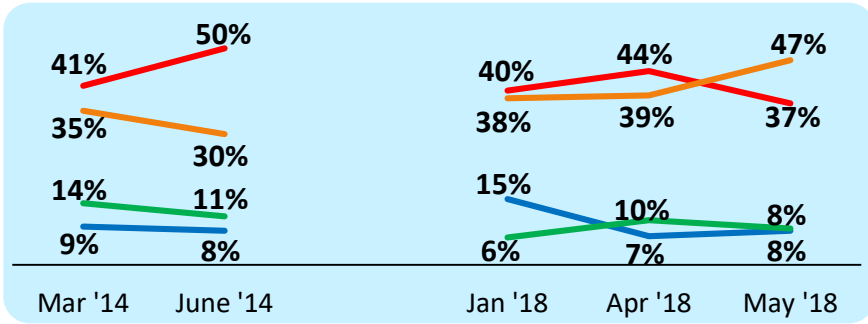
Thrifty Moderates



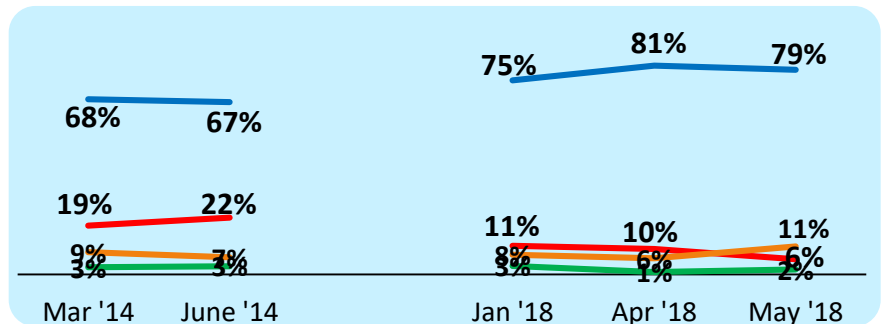
Deferential Conservatives



Core Left



Populist Conservatives



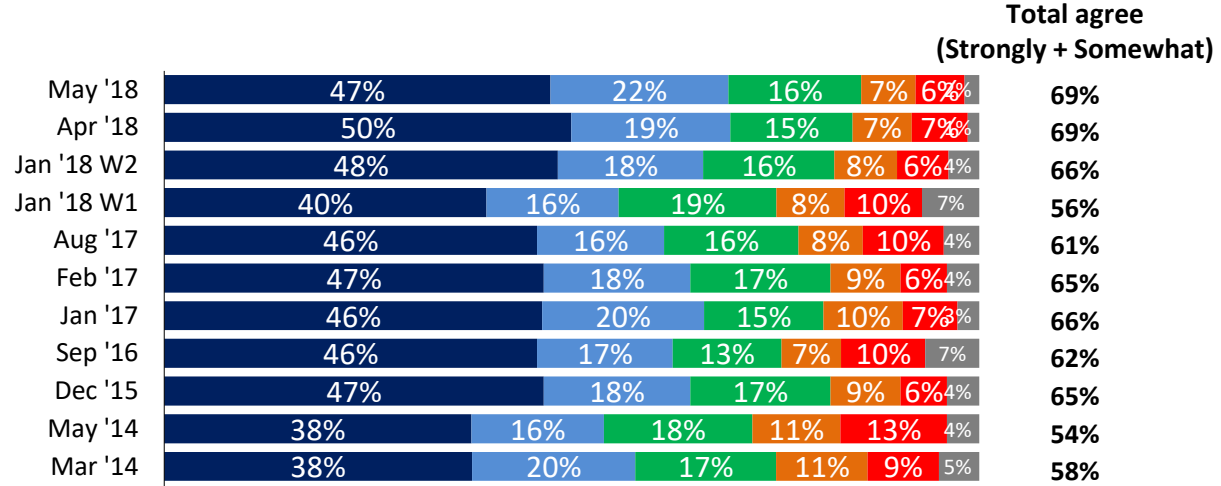
Decided vote: **Liberal** **PC** **NDP** **Green**

Time for Change Attitudes

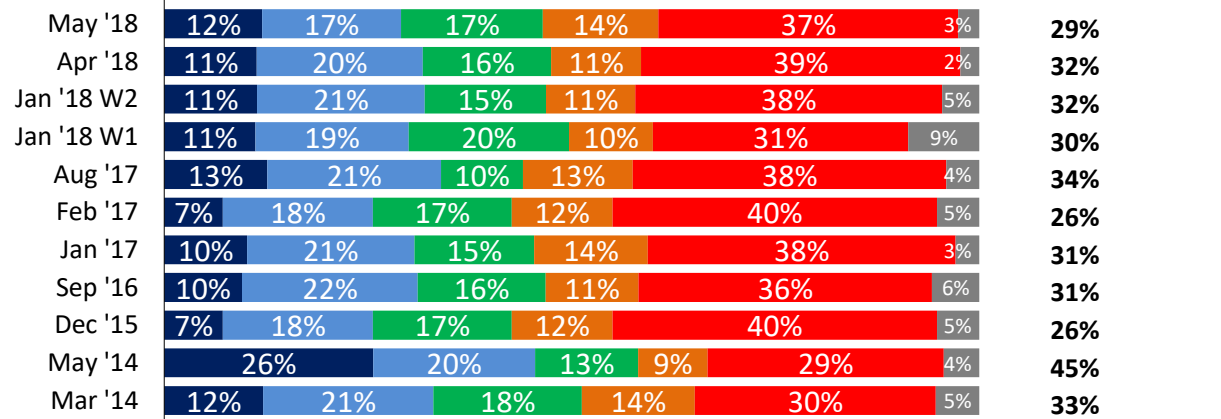
Time for Change tracking: Time for change sentiment steady¹⁰ month-to-month (69% agree)

Q For each of the following statements please indicate if you agree or disagree?
[asked of all respondents]

It's time for a change in government here in Ontario.



The Ontario Liberals have their problems, but they are still the best party to form government.



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

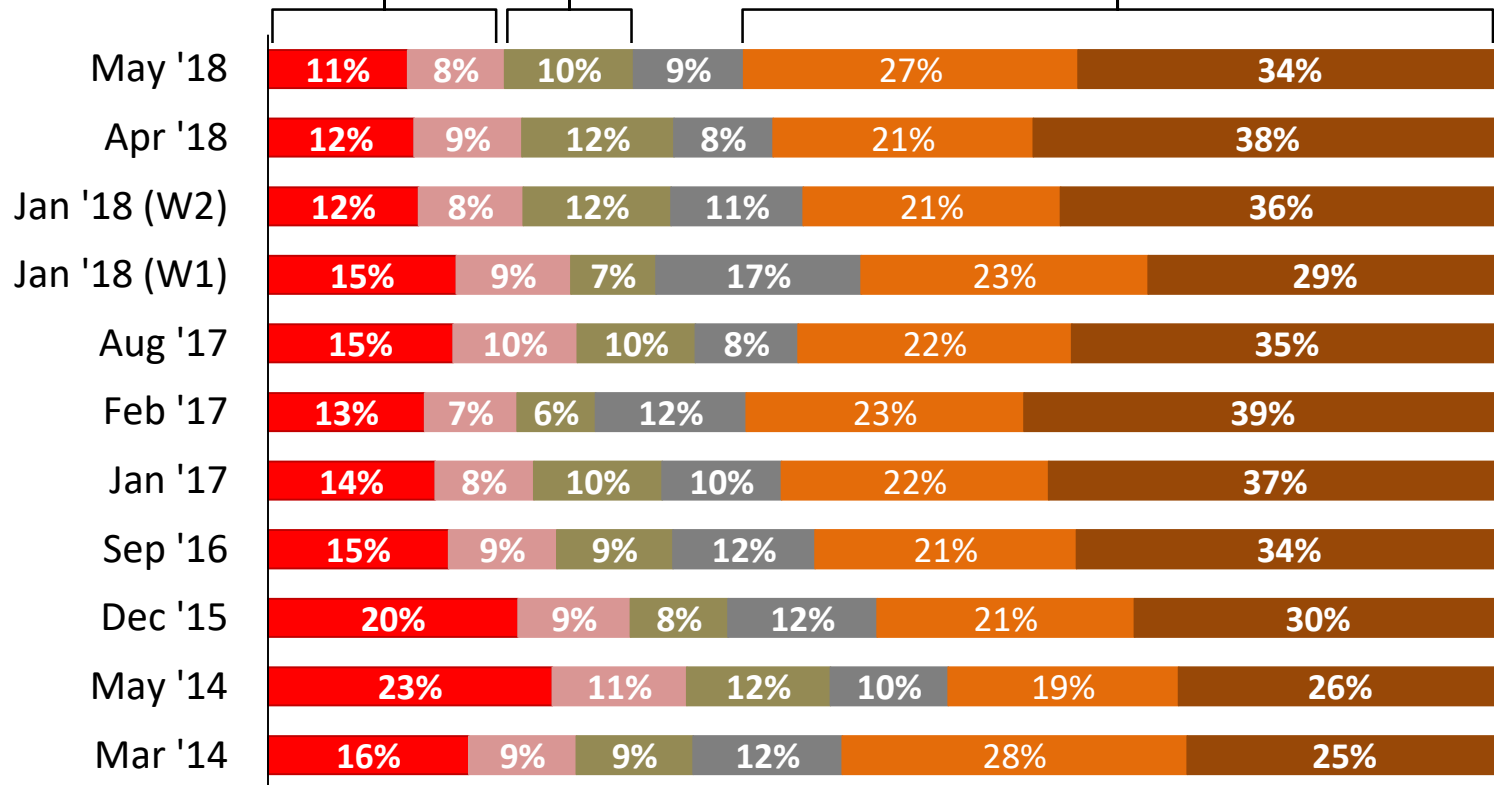
Time for Change Segmentation Tracking: Hostile (34%) down 4 points since April; Soft anti-Liberals (27%) up 6 points ¹¹

Based on the two time-for-change questions, we group respondents who share common sets of values to better understand the motivations and needs of voters.

Don't feel it is time for a change and think Liberals best to form government

Key conflicted voters. Feel it is time for change, but also think Liberals are still the best option.

Feel both that it is time for a change, and disagree that Liberals are the best option to form government.



■ Core ON Liberals
 ■ Soft ON Liberals
 ■ Time for change ON Liberals
■ Uncertain
 ■ Soft anti-ON Liberals
 ■ Hostile

Time for change: Compared to March 2014, Liberals have mainly lost ground with conflicted “Time-for-change” voters

Based on the two time-for-change questions, we group respondents who share common sets of values to better understand the motivations and needs of voters.

Time-for-a-change segmentation

Column % shown	Core ON Liberals		Soft ON Liberals		Time for change ON Liberals		Uncertain		Soft anti-ON Liberals		Hostile	
	May '18	Mar '14	May '18	Mar '14	May '18	Mar '14	May '18	Mar '14	May '18	Mar '14	May '18	Mar '14
Liberal	88%	89%	78%	64%	39%	61%	17%	21%	9%	7%	0%	1%
Progressive Conservative	1%	0%	0%	5%	17%	6%	5%	9%	26%	31%	68%	64%
NDP	9%	6%	17%	17%	30%	23%	18%	20%	37%	38%	22%	20%
Green	0%	3%	3%	11%	6%	6%	12%	6%	9%	7%	3%	6%
Other	0%	0%	0%	0%	0%	0%	1%	2%	0%	1%	2%	2%
Undecided/Don't know	2%	2%	2%	4%	8%	4%	41%	26%	18%	13%	5%	6%
Would not vote/none	1%	1%	0%	0%	0%	0%	7%	17%	2%	2%	0%	1%

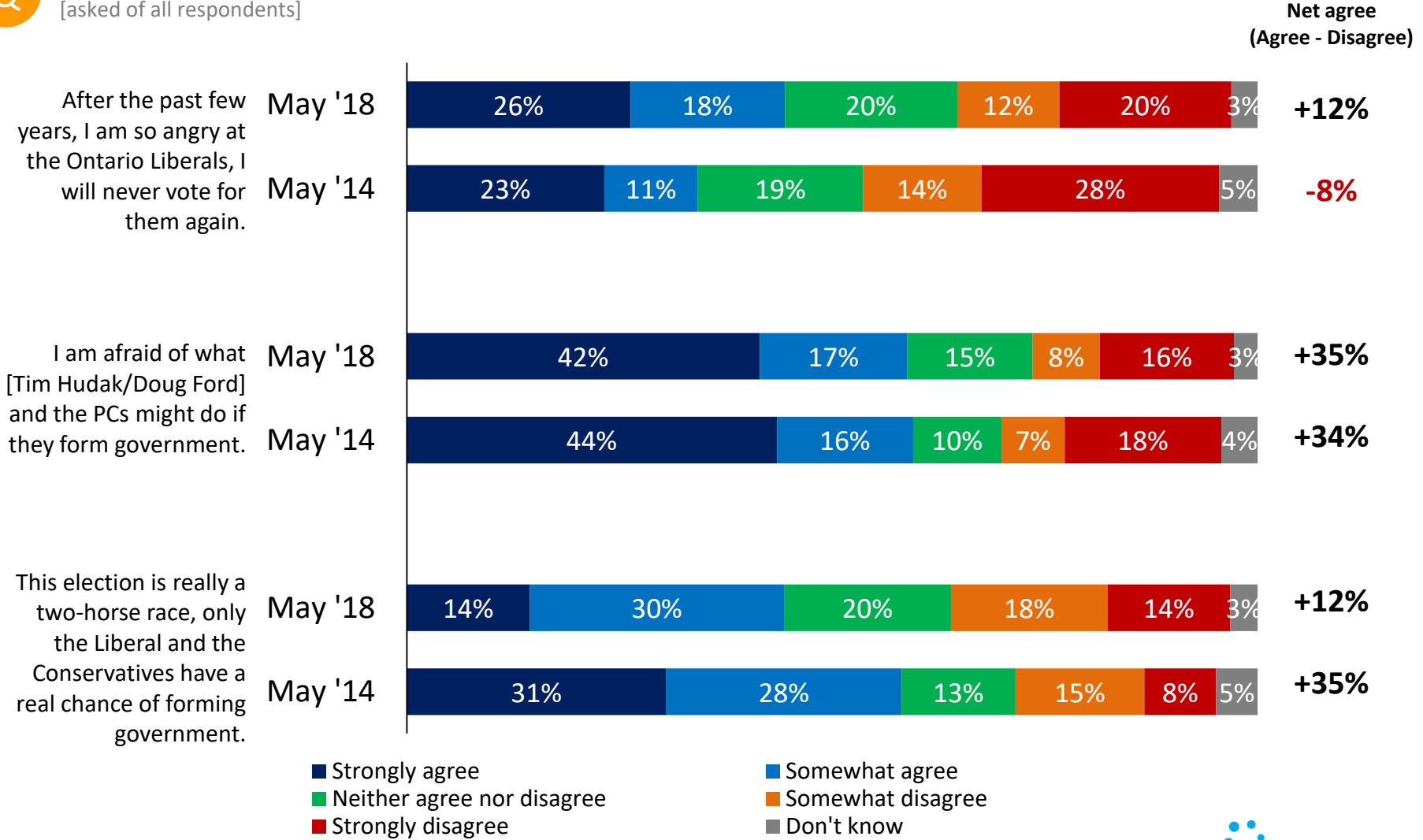
Combined Vote

Note: “Don’t know” not shown due to insufficient sample size.



Attitude Tracking: Net agreement that the election is a two horse race down 23 points from +35% to +12%

Q For each of the following statements please indicate if you agree or disagree?
[asked of all respondents]



Two-Horse Race: NDP support is strongest among those who “strongly disagree” it is a two-horse race (54%)



For each of the following statements please indicate if you agree or disagree? This election is really a two-horse race, only the Liberal and the Conservatives have a real chance of forming government. **BY** Combined Vote
[asked of all respondents]

Two-horse race

Column % shown	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Liberal	31%	25%	22%	30%	11%
Progressive Conservative	48%	40%	29%	23%	25%
NDP	13%	18%	19%	33%	54%
Green	5%	7%	5%	3%	5%
Other	1%	0%	1%	1%	0%
Undecided/Don't know	3%	10%	21%	10%	5%
Would not vote/none	0%	1%	4%	1%	0%

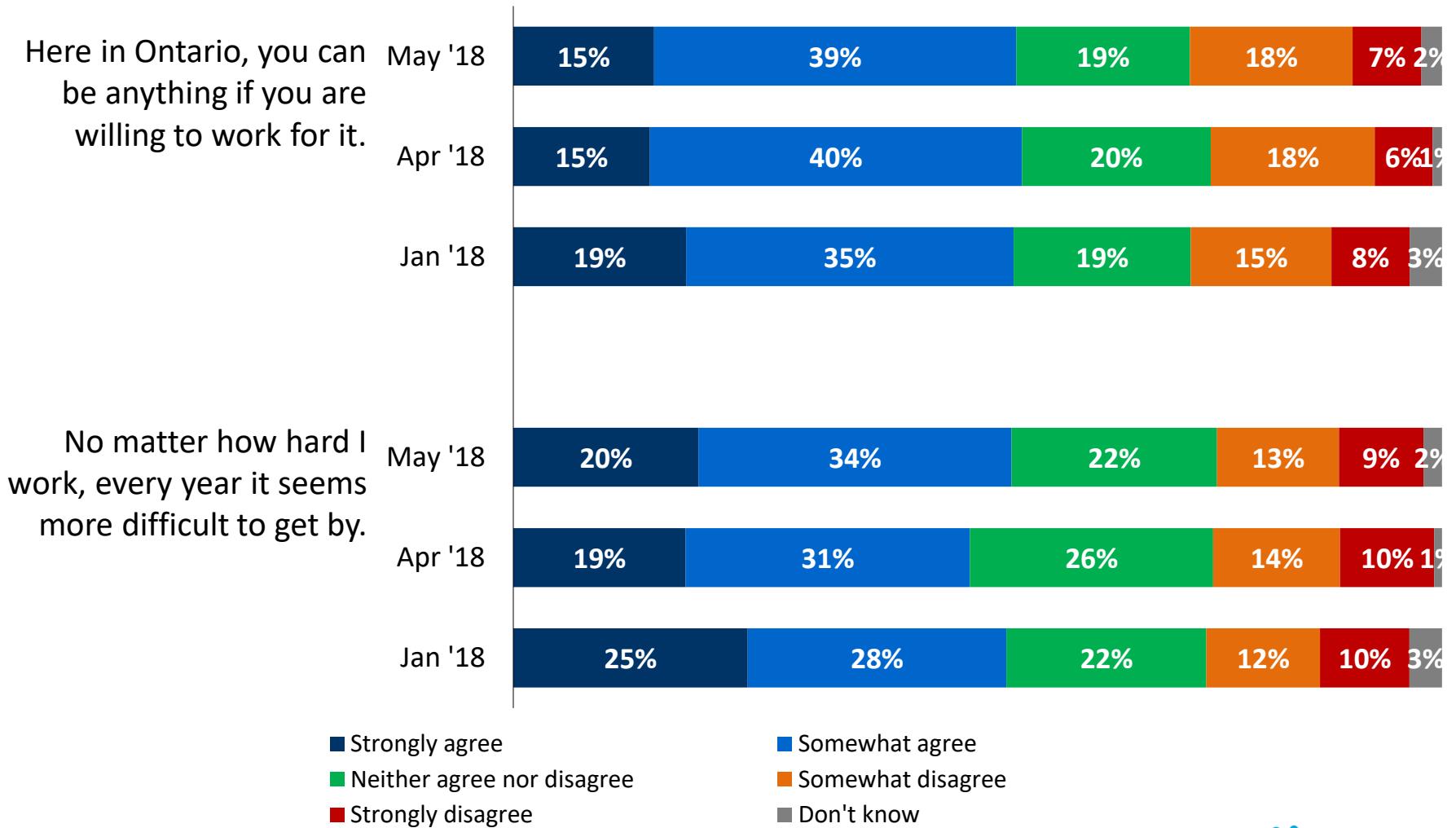
Note: “Don’t know” not shown due to insufficient sample size.

Alienation Segmentation

Economic Values Tracking: These two value statements define economic alienation segmentation we can track over time

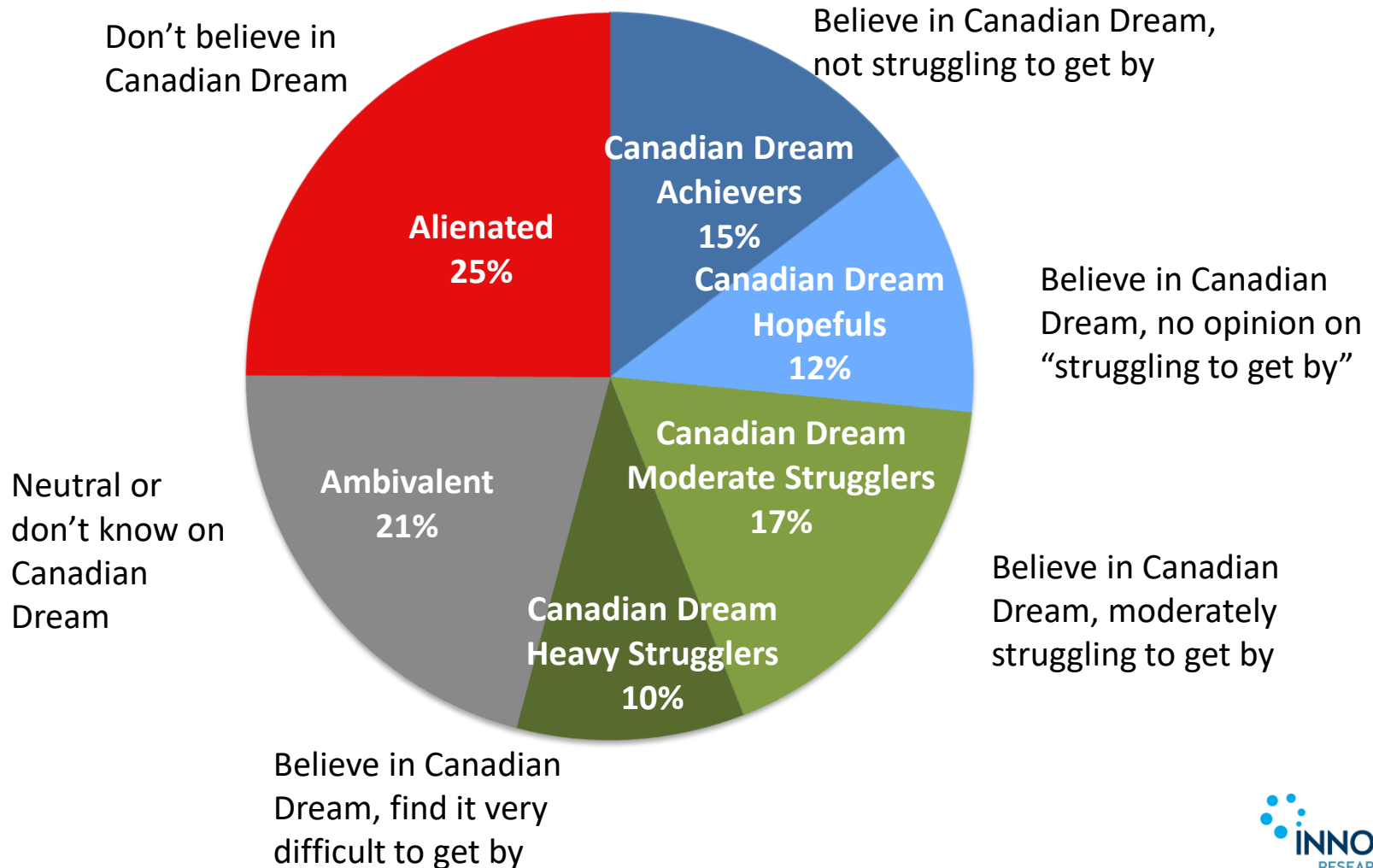


Do you agree or disagree with the following statements?

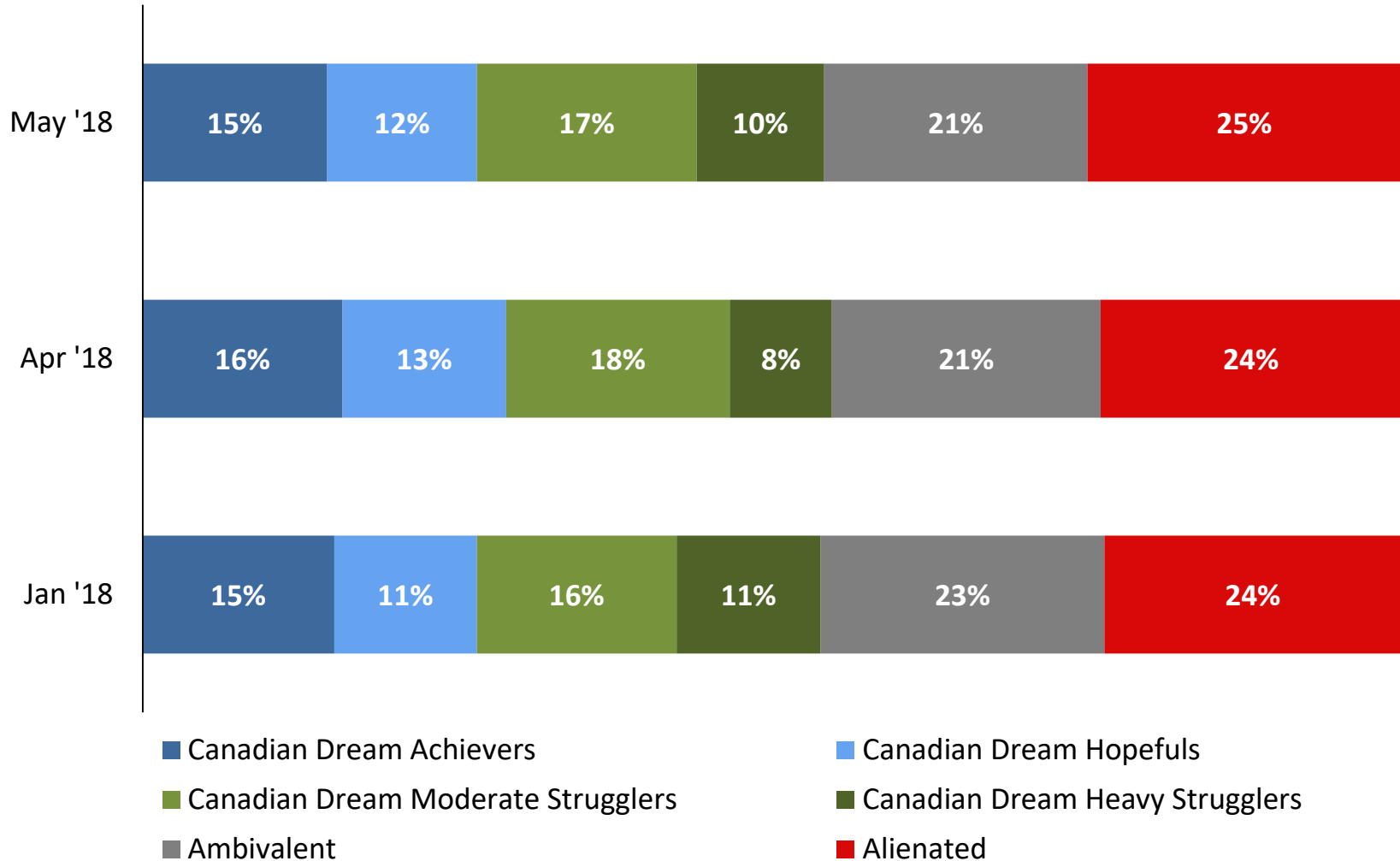


Economic Alienation Segmentation: Almost half are either Ambivalent or Alienated

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.

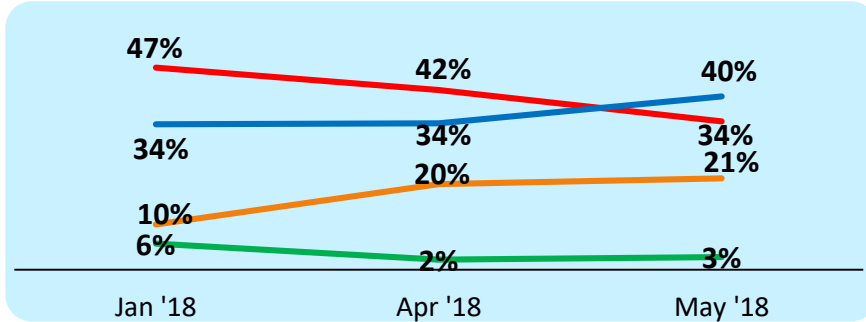


Economic Alienation Segmentation: Tracking over time

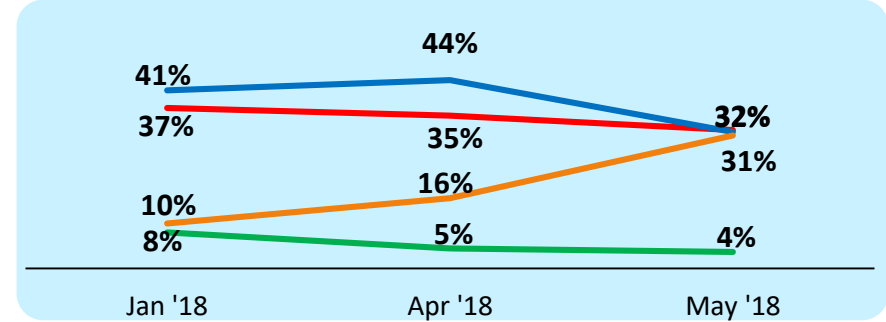


Tracking Decided Vote by Alienation Segmentation

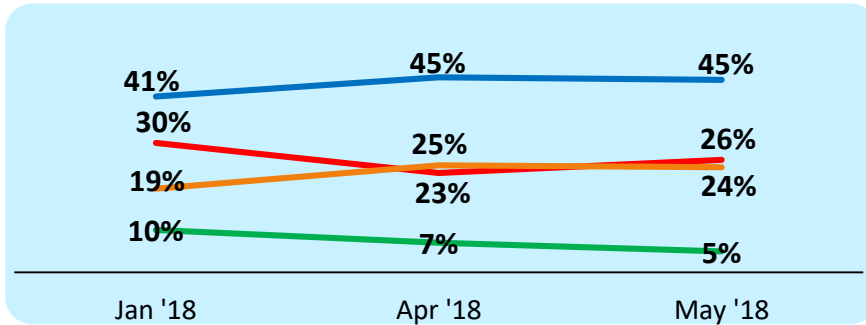
Canadian Dream Achievers



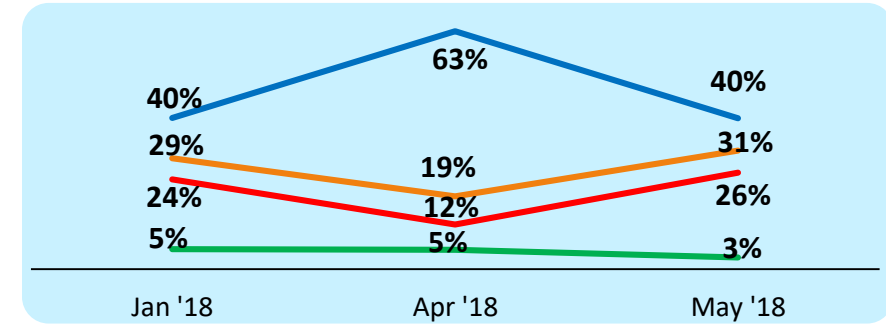
Canadian Dream Hopefuls



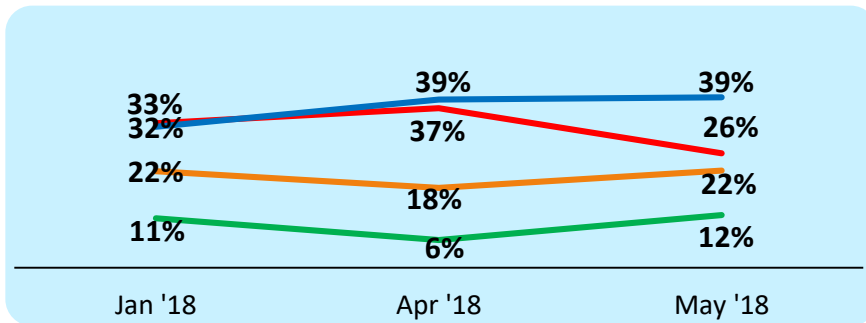
Canadian Dream Moderate Strugglers



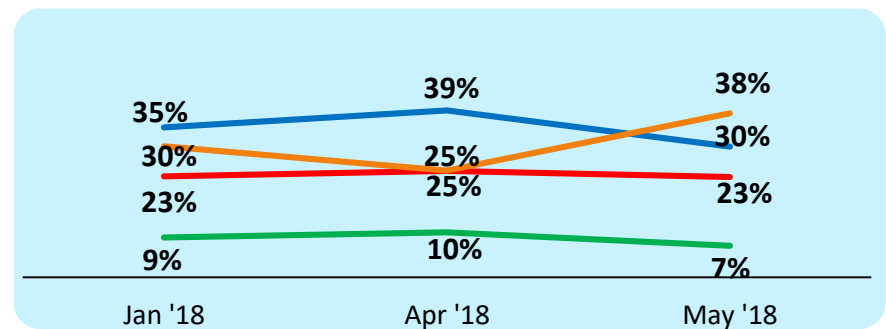
Canadian Dream Heavy Strugglers



Ambivalent



Alienated



Decided vote:

Liberal

PC

NDP

Green



Building Understanding.

Personalized research to connect you and your audiences.

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