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Public Opinion Research
Ontario Election: May Polling Wave 4

Vote, Leadership and Final Debate

Field Dates: May 27th (immediately following the final debate) to May 30th, 2018
Sample Size: n=1,000

Methodology

- These are the findings of a special Innovative Research Group (INNOVATIVE) online poll conducted from May 27th (immediately following the final debate) to May 30th, 2018 with tracking drawn from our monthly Canada This Month surveys.

- This online survey of 1,112 adult Ontarians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional respondents from Léger, a leading provider of online sample. The sample is weighted to n=1,000 based on Census data from Statistics Canada.

  - The vote, leader and debate analysis, as well as segmentations and cluster analysis herein is based on the 958 completed surveys as of May 29th, (weighted n=800). The survey ran for an additional day to bring the final sample size up to 1,000. Thus, sample sizes noted on some slides will vary.

- The panels are 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:** References to May 2018 Wave 1 refer to our May 2018 Canada this Month survey in field from May 7th to May 9th, with a weighted sample of n=915 respondents. References to May 2018 Wave 2 refer to our first special online poll in field from May 9th to May 12th, with a weighted sample of n=1,500 respondents. References to May 2018 Wave 3 refer to our online poll from May 18th to May 23rd with a weighted sample of n=1,050. The current wave of results is referred to as May 2018 Wave 4.

Note: *Graphs and tables may not always total 100% due to rounding values rather than error in data. Sums are added before rounding numbers.*
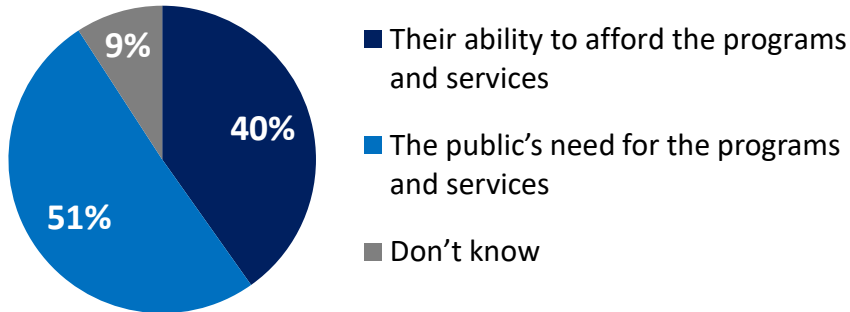
Ontario Weights: Age, gender, and region

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.

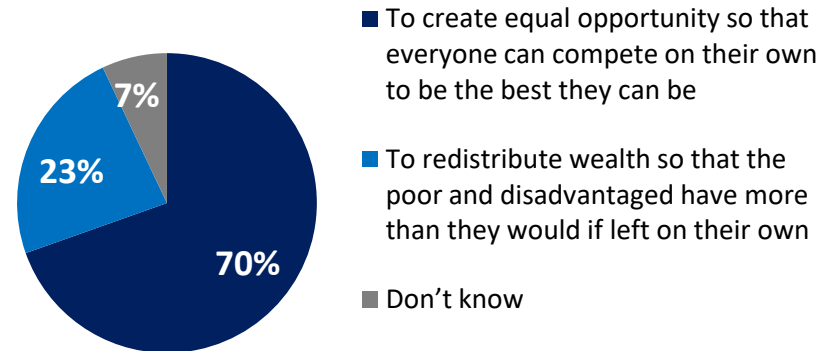|	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	99	8.9%	137	13.7%
Males 35-54	168	15.1%	183	18.3%
Males 55+	290	26.1%	160	16.0%
Females 18-34	148	13.3%	140	14.0%
Females 35-54	144	12.9%	194	19.4%
Females 55+	263	23.7%	186	18.6%
Toronto	274	24.6%	209	20.9%
Rest of GTA	238	21.4%	253	25.3%
South/West	297	26.7%	262	26.2%
North/East	303	27.2%	276	27.6%

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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 …?

- ■ Their ability to afford the programs and services
- ■ The public's need for the programs and services
- ■ Don't know

40%
51%
9%

Q Is the main role of government …?

- ■ To create equal opportunity so that everyone can compete on their own to be the best they can be
- ■ To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own
- ■ Don't know

7%
23%
70%

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

- ■ … brings out the worst in human nature
- ■ … teaches people the value of hard work and success
- ■ Don't know

16%
39%
45%
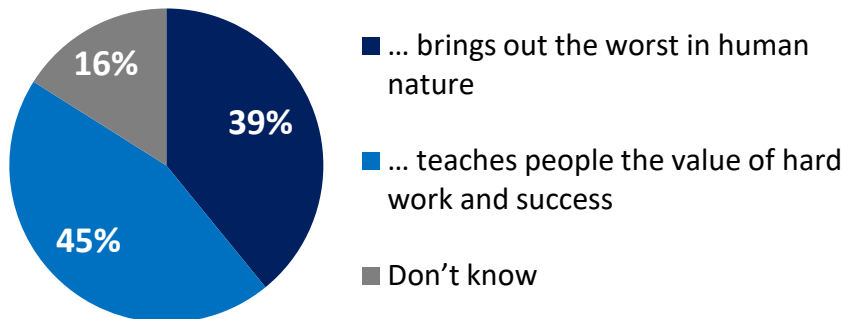
Q When it comes to government decision making, which of the following statements is closest to your view?

- ■ Too often the government listens to experts instead of common sense
- ■ Provincial issues are complicated so government should listen to experts when it comes to policy
- ■ Don't know

13%
51%
36%

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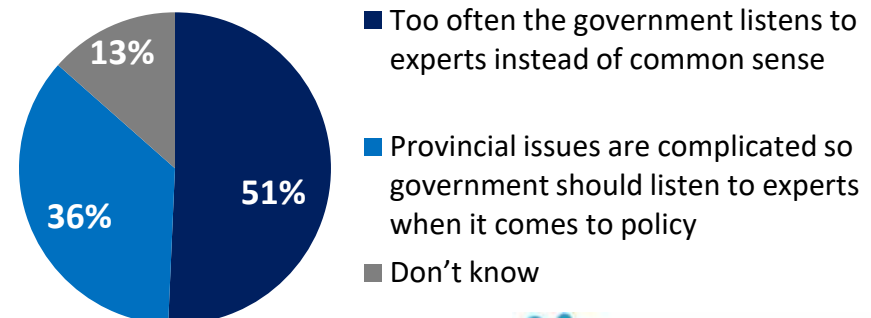
Defining Value Clusters

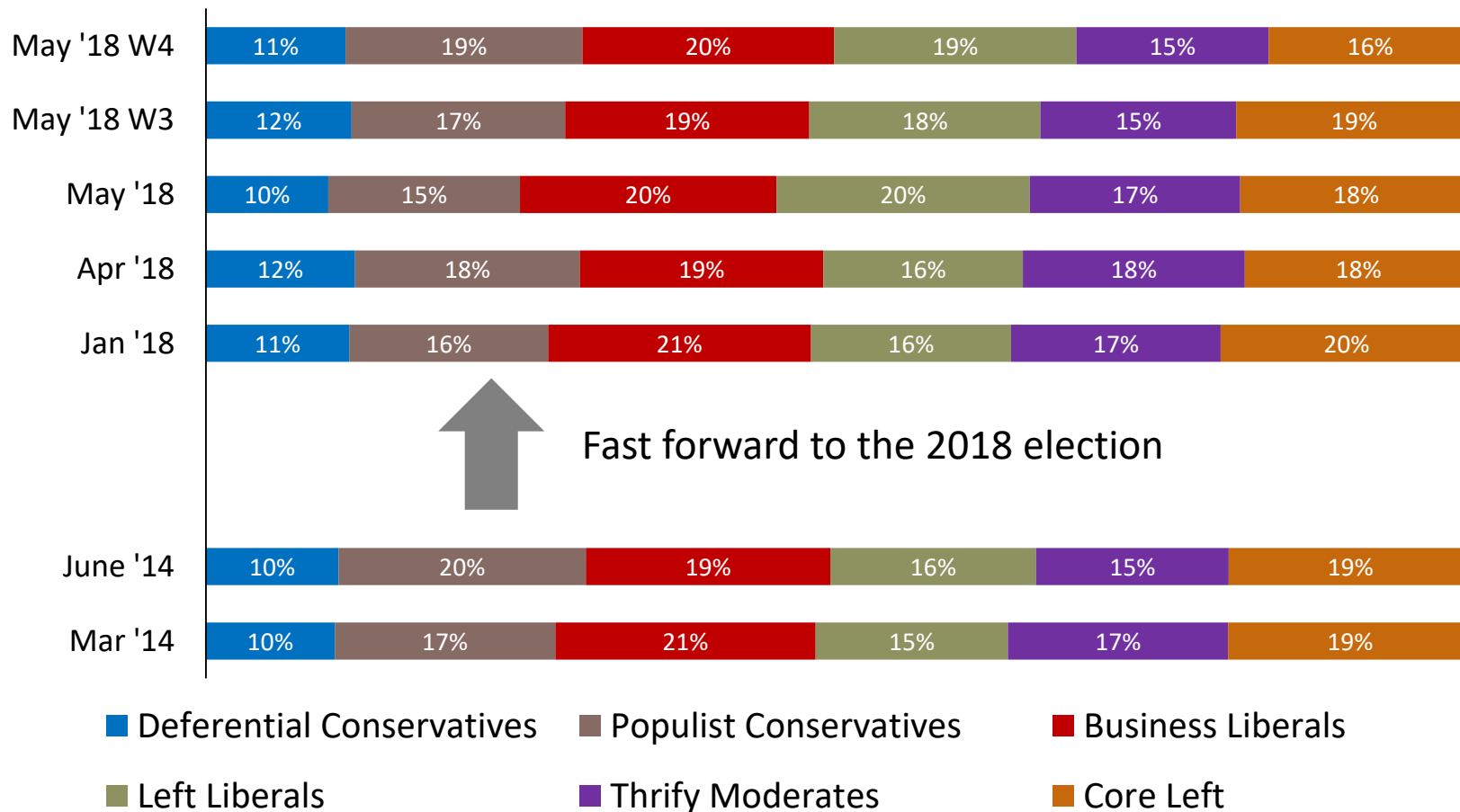|		Deferential Conser-vatives	Populist Conser-vatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Is the main role of government to …?	**Create equal opportunity**	91%	100%	76%	96%	48%	0%
	Redistribute wealth	7%	0%	15%	0%	27%	97%
The profit system …	**Brings out worst in human nature**	0%	0%	0%	80%	67%	85%
	Teaches value of hard work and success	88%	91%	87%	0%	5%	0%
When gov't make decisions on spending on programs, do you think they should base their decisions on…	**Ability to afford**	93%	96%	0%	0%	80%	0%
	Public need	0%	0%	95%	87%	0%	94%
When it comes to government decision making…	**Listen to experts**	91%	0%	45%	21%	21%	60%
	Rely on common sense	0%	100%	44%	57%	49%	31%

Value Clusters: Tracking clusters 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.

	Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrify Moderates	Core Left
May '18 W4	11%	19%	20%	19%	15%	16%
May '18 W3	12%	17%	19%	18%	15%	19%
May '18	10%	15%	20%	20%	17%	18%
Apr '18	12%	18%	19%	16%	18%	18%
Jan '18	11%	16%	21%	16%	17%	20%
June '14	10%	20%	19%	16%	15%	19%
Mar '14	10%	17%	21%	15%	17%	19%

Fast forward to the 2018 election

■ Deferential Conservatives   ■ Populist Conservatives   ■ Business Liberals

■ Left Liberals   ■ Thrify Moderates   ■ Core Left

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Tracking Decided Vote by Value Cluster

Left Liberals
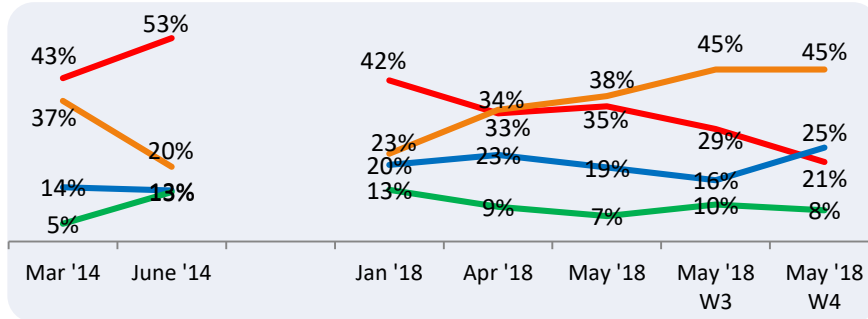
Business Liberals

Thrifty Moderates
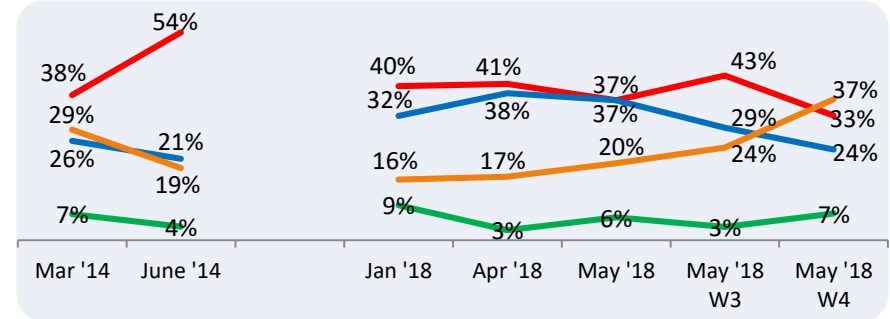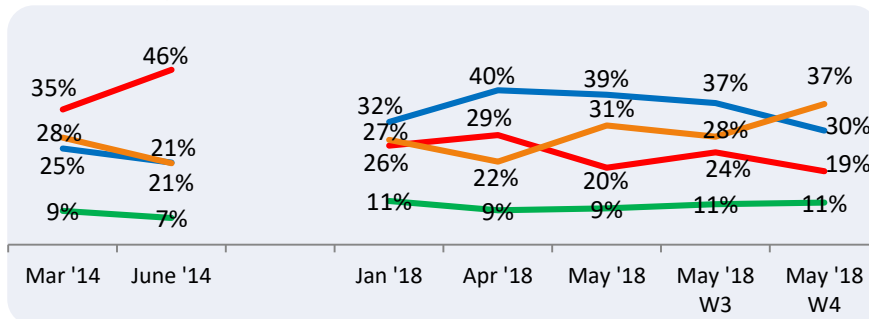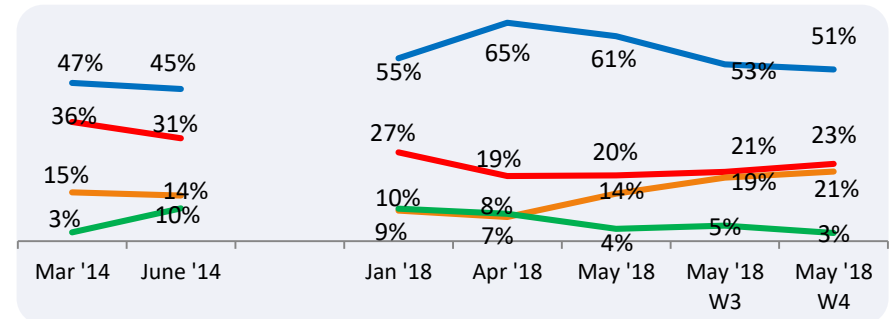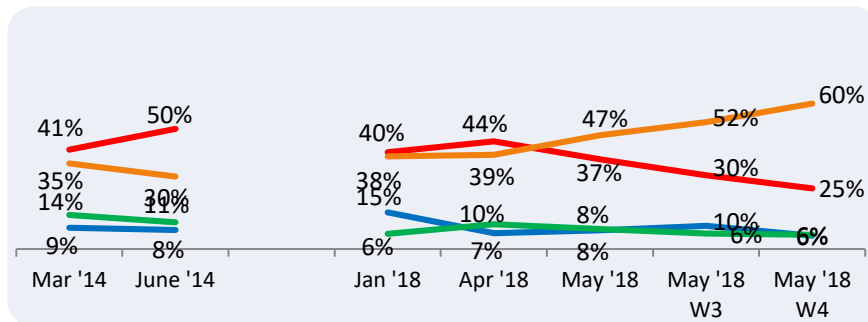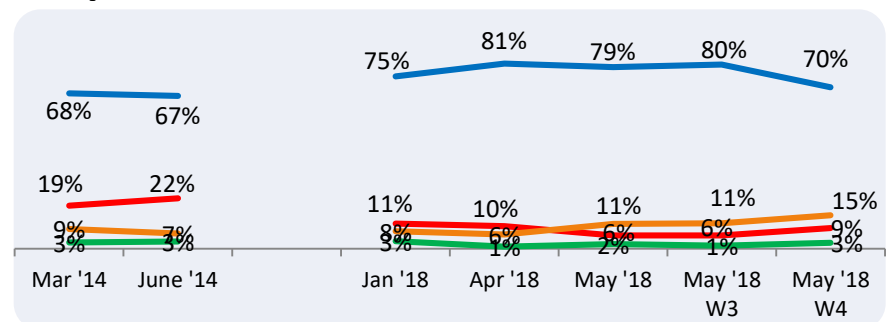

Deferential Conservatives

Core Left

Populist Conservatives

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

Time-for-Change

Time for Change Tracking: Time for change sentiment steady since wave 3 (70%); Liberals still best party down 3 points
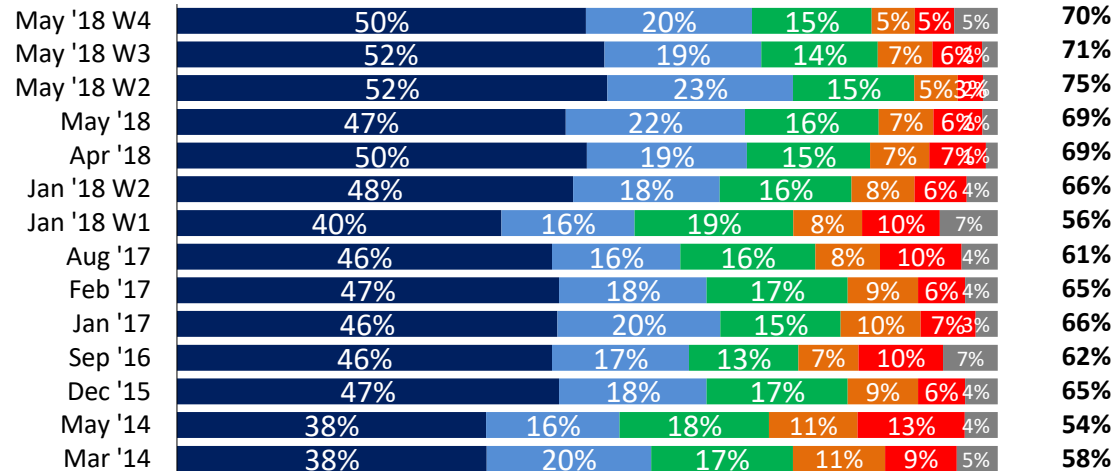
Q For each of the following statements please indicate if you agree or disagree?
[asked of all respondents; n=1,000]

Total agree (Strongly + Somewhat)

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

Wave	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Total agree
May '18 W4	50%	20%	15%	5%	5%	5%	70%
May '18 W3	52%	19%	14%	7%	6%	2%	71%
May '18 W2	52%	23%	15%	5%	3%	2%	75%
May '18	47%	22%	16%	7%	6%	2%	69%
Apr '18	50%	19%	15%	7%	7%	1%	69%
Jan '18 W2	48%	18%	16%	8%	6%	4%	66%
Jan '18 W1	40%	16%	19%	8%	10%	7%	56%
Aug '17	46%	16%	16%	8%	10%	4%	61%
Feb '17	47%	18%	17%	9%	6%	4%	65%
Jan '17	46%	20%	15%	10%	7%	3%	66%
Sep '16	46%	17%	13%	7%	10%	7%	62%
Dec '15	47%	18%	17%	9%	6%	4%	65%
May '14	38%	16%	18%	11%	13%	4%	54%
Mar '14	38%	20%	17%	11%	9%	5%	58%

The Ontario Liberals have their problems, but they are still the best party to form government
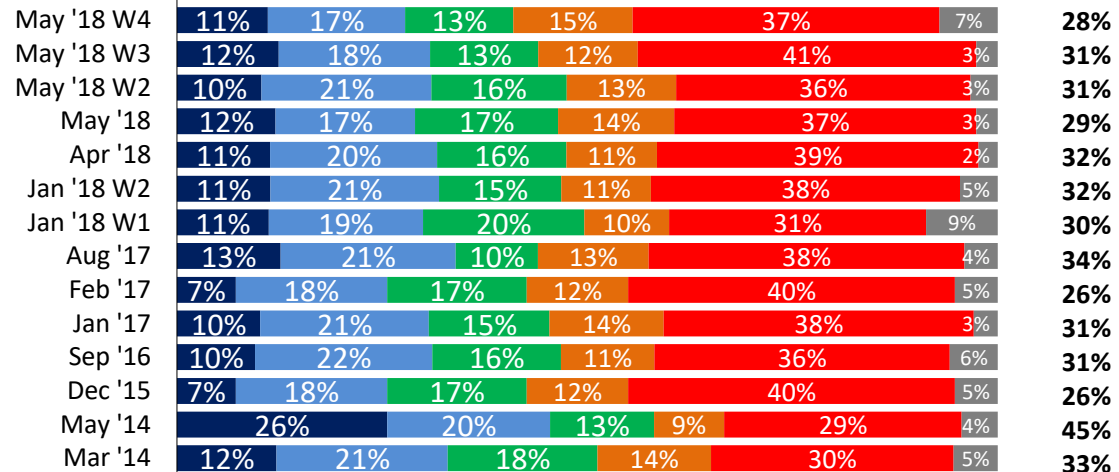
Wave	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Total agree
May '18 W4	11%	17%	13%	15%	37%	7%	28%
May '18 W3	12%	18%	13%	12%	41%	3%	31%
May '18 W2	10%	21%	16%	13%	36%	3%	31%
May '18	12%	17%	17%	14%	37%	3%	29%
Apr '18	11%	20%	16%	11%	39%	2%	32%
Jan '18 W2	11%	21%	15%	11%	38%	5%	32%
Jan '18 W1	11%	19%	20%	10%	31%	9%	30%
Aug '17	13%	21%	10%	13%	38%	4%	34%
Feb '17	7%	18%	17%	12%	40%	5%	26%
Jan '17	10%	21%	15%	14%	38%	3%	31%
Sep '16	10%	22%	16%	11%	36%	6%	31%
Dec '15	7%	18%	17%	12%	40%	5%	26%
May '14	26%	20%	13%	9%	29%	4%	45%
Mar '14	12%	21%	18%	14%	30%	5%	33%

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

Time for Change Tracking: Hostile group down 7 points to 35%; soft-anti group up 9 points to 27%

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.
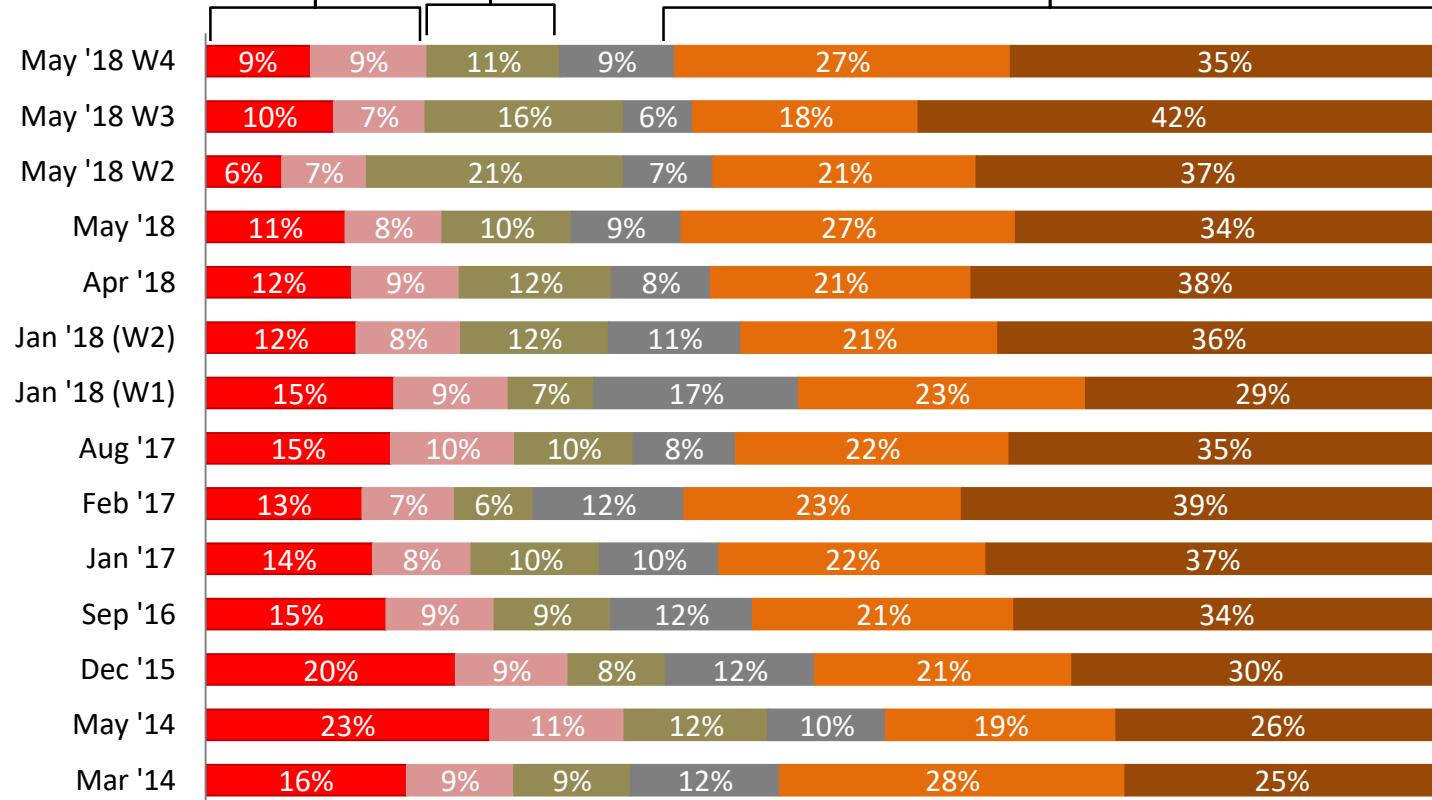
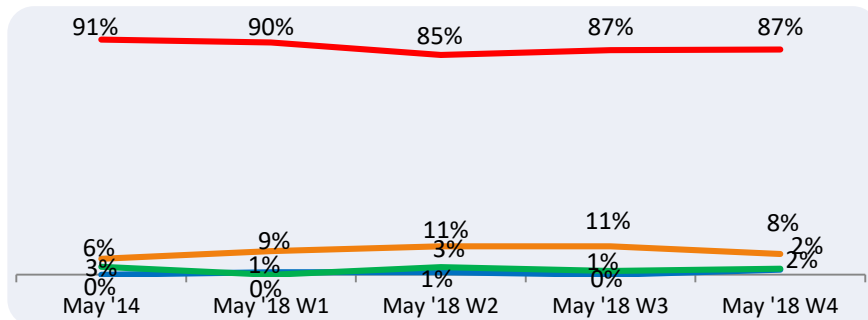|	Core ON Liberals	Soft ON Liberals	Time for change ON Liberals	Uncertain	Soft anti-ON Liberals	Hostile
May '18 W4	9%	9%	11%	9%	27%	35%
May '18 W3	10%	7%	16%	6%	18%	42%
May '18 W2	6%	7%	21%	7%	21%	37%
May '18	11%	8%	10%	9%	27%	34%
Apr '18	12%	9%	12%	8%	21%	38%
Jan '18 (W2)	12%	8%	12%	11%	21%	36%
Jan '18 (W1)	15%	9%	7%	17%	23%	29%
Aug '17	15%	10%	10%	8%	22%	35%
Feb '17	13%	7%	6%	12%	23%	39%
Jan '17	14%	8%	10%	10%	22%	37%
Sep '16	15%	9%	9%	12%	21%	34%
Dec '15	20%	9%	8%	12%	21%	30%
May '14	23%	11%	12%	10%	19%	26%
Mar '14	16%	9%	9%	12%	28%	25%

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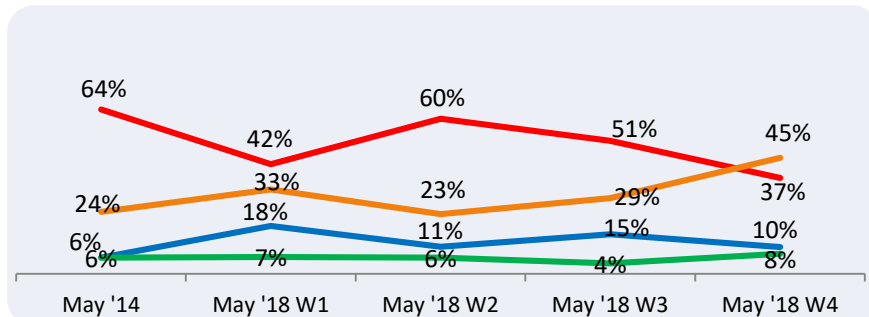■ Uncertain   ■ Soft anti-ON Liberals   ■ Hostile

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Tracking Decided Vote by Time-for-Change Segmentation

Core ON Liberals

91% 90% 85% 87% 87%
6% 9% 11% 11% 8%
3% 1% 3% 1% 2%
0% 0% 1% 0% 2%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

Soft ON Liberals

66% 80% 70% 72% 52%
18% 17% 23% 20% 28%
11% 3% 5% 5% 13%
5% 0% 2% 1% 6%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

Time-for-Change ON Liberals

64% 42% 60% 51% 45%
24% 33% 23% 29% 37%
6% 18% 11% 15% 10%
6% 7% 6% 4% 8%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

Uncertain

36% 34% 37% 46% 43%
34% 32% 37% 22% 27%
16% 23% 13% 16% 16%
10% 9% 13% 12% 11%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

Soft anti-ON Liberals

45% 46% 52% 57% 56%
37% 32% 29% 25% 25%
8% 11% 12% 10% 10%
8% 11% 7% 8% 8%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

Hostile

69% 72% 66% 66% 65%
22% 23% 28% 27% 26%
6% 3% 3% 6% 4%
1% 0% 3% 0% 1%
May '14 May '18 W1 May '18 W2 May '18 W3 May '18 W4

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

Political Attitudes

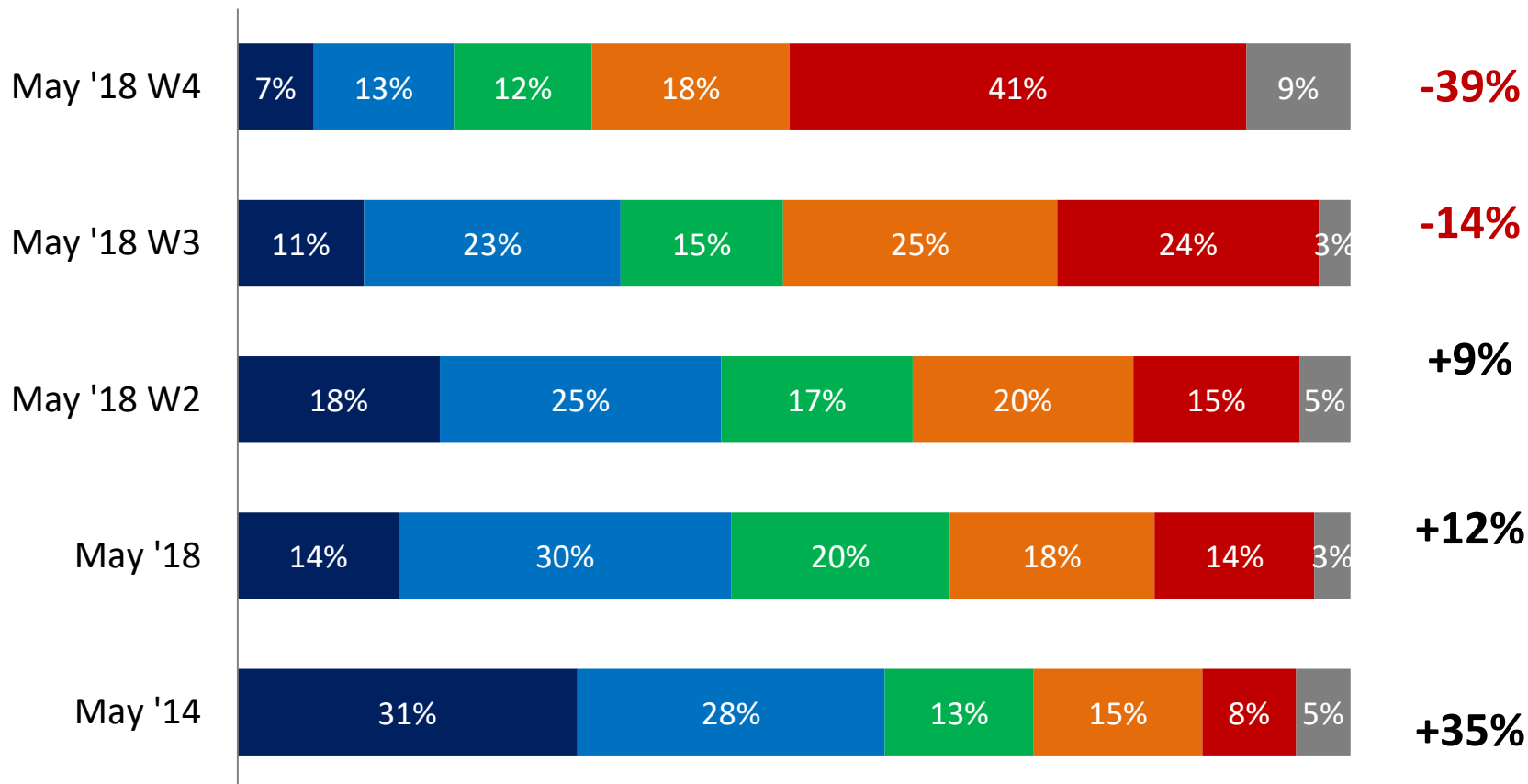# Two-Horse Race: Strongly disagree up 18 points since wave 3; majority (59%) now disagree

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

Net agree (Agree - Disagree)

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net agree
May '18 W4	7%	13%	12%	18%	41%	9%	**-39%**
May '18 W3	11%	23%	15%	25%	24%	3%	**-14%**
May '18 W2	18%	25%	17%	20%	15%	5%	**+9%**
May '18	14%	30%	20%	18%	14%	3%	**+12%**
May '14	31%	28%	13%	15%	8%	5%	**+35%**

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

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Two-Horse Race: PC vote share highest among those who strongly agree; NDP vote highest among strongly disagree

Q Combined Vote **BY** 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
[asked of all respondents; n=1,000]

Two-horse race – May 2018 Tracking by Wave

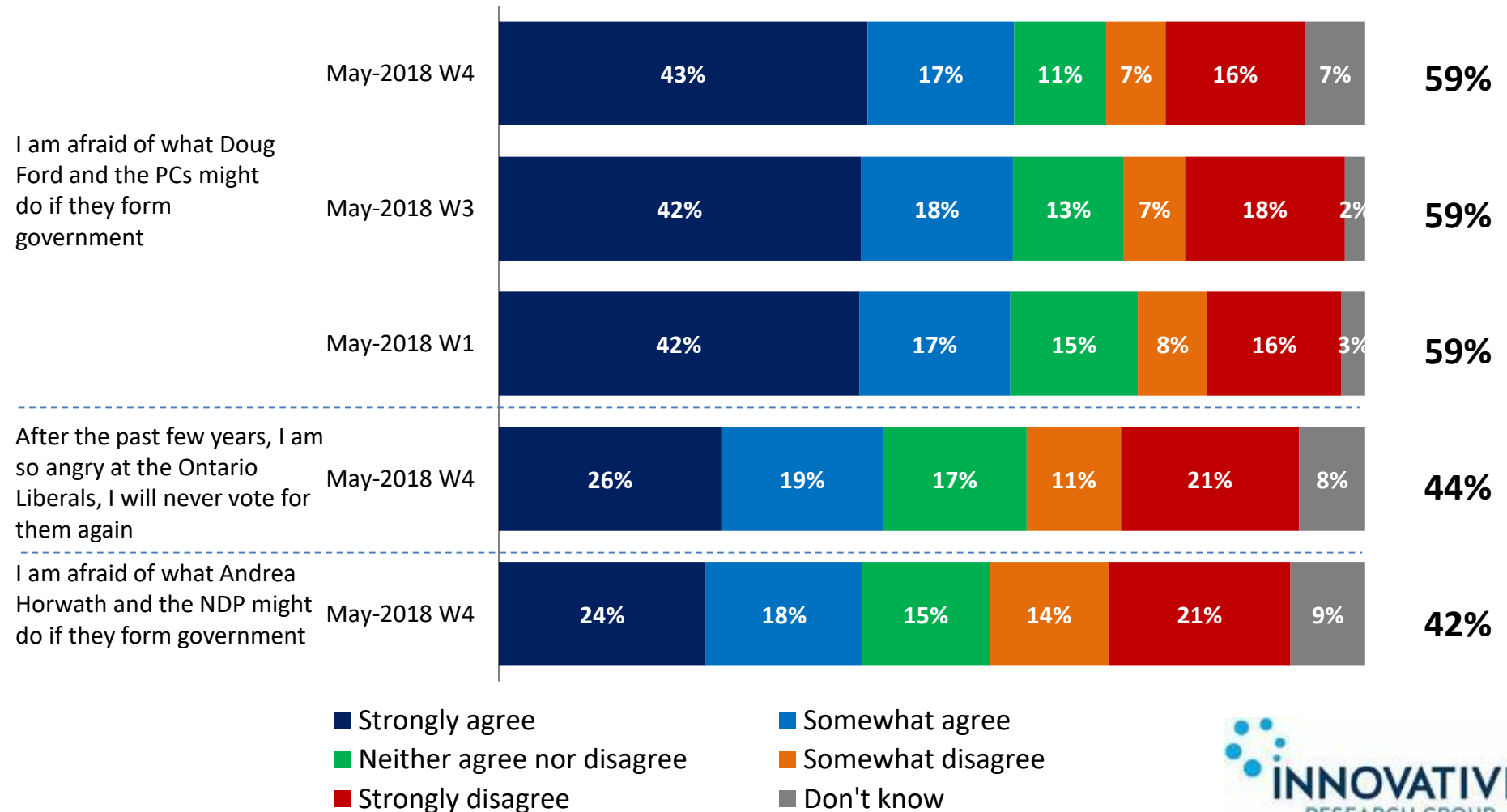| Column % shown	Strongly agree				Somewhat agree				Neither agree nor disagree				Somewhat disagree				Strongly disagree			
	W4*	W3	W2	W1	W4	W3	W2	W1	W4	W3	W2	W1	W4	W3	W2	W1	W4	W3	W2	W1
Liberal	25%	30%	36%	31%	21%	33%	29%	25%	29%	32%	22%	22%	26%	24%	25%	30%	13%	9%	10%	11%
Progressive Conservative	51%	48%	42%	48%	39%	37%	35%	40%	37%	31%	32%	29%	31%	29%	25%	23%	26%	30%	25%	25%
NDP	12%	11%	15%	13%	21%	17%	21%	18%	14%	20%	18%	19%	29%	33%	40%	33%	50%	50%	53%	54%
Green	9%	8%	2%	5%	12%	5%	7%	7%	6%	5%	5%	5%	5%	6%	6%	3%	5%	6%	5%	5%
Other	2%	0%	0%	1%	0%	0%	0%	0%	2%	2%	0%	1%	1%	1%	0%	1%	2%	1%	0%	0%
Undecided/ Don't know	0%	3%	3%	3%	5%	6%	7%	10%	11%	8%	19%	21%	6%	7%	3%	10%	3%	4%	5%	5%
Would not vote/none	2%	1%	1%	0%	2%	1%	1%	1%	0%	2%	4%	4%	2%	0%	0%	1%	0%	0%	2%	0%

Combined Vote

Note: "Don't know" not shown.
*Treat results with caution due to small sample size (n=68)

Leader Attitudes: 44% of respondents agree that they are so[16] angry at the Ontario Liberals they will never vote for them

Q For each of the following statements please indicate if you agree or disagree?
[asked of all respondents; n=1,000]

Total agree (Strongly + Somewhat)

I am afraid of what Doug Ford and the PCs might do if they form government

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Total agree
May-2018 W4	43%	17%	11%	7%	16%	7%	**59%**
May-2018 W3	42%	18%	13%	7%	18%	2%	**59%**
May-2018 W1	42%	17%	15%	8%	16%	3%	**59%**

After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again

May-2018 W4	26%	19%	17%	11%	21%	8%	**44%**

I am afraid of what Andrea Horwath and the NDP might do if they form government

May-2018 W4	24%	18%	15%	14%	21%	9%	**42%**

Legend:
- ■ Strongly agree
- ■ Somewhat agree
- ■ Neither agree nor disagree
- ■ Somewhat disagree
- ■ Strongly disagree
- ■ Don't know

Leader Attitudes by Party ID: Liberal partisans split on if they are scared of what NDP might do in gov. (net -1%)

Attitudes by Party ID

Party ID

Net agreement (Total % agree minus total % disagree)	Liberal	PC	NDP	Green/Other	Unaligned
I am afraid of what Doug Ford and the PCs might do if they form government	+76%	-32%	+71%	+28%	+34%
After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again	-35%	+73%	+6%	+26%	+22%
I am afraid of what Andrea Horwath and the NDP might do if they form government	-1%	+64%	-68%	+7%	+1%

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Leader Attitudes by Region: Net fear of PCs in government higher than fear of NDP in every region

Attitudes by Region

Region

Net agreement (Total % agree minus total % disagree)	Toronto	Rest of GTA	South/West	North/East
I am afraid of what Doug Ford and the PCs might do if they form government	+44%	+30%	+34%	+39%
After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again	-8%	+13%	+21%	+21%
I am afraid of what Andrea Horwath and the NDP might do if they form government	-5%	+17%	+7%	+9%

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Leader Attitudes by Value Cluster: Conservative groups inconsistent on fear of Doug Ford and PCs

Attitudes BY Value Cluster

Net agreement (Total % agree minus total % disagree)	Value Cluster					
	Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
I am afraid of what Doug Ford and the PCs might do if they form government	+30%	-29%	+54%	+46%	+35%	+84%
After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again	+28%	+59%	-1%	+10%	+25%	-36%
I am afraid of what Andrea Horwath and the NDP might do if they form government	+51%	+60%	-1%	-5%	+6%	-54%

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Leader Attitudes by Econ. Alienation: Alienated respondents are afraid of a PC government; much more confident in NDP

Attitudes BY Economic Alienation

Alienation Segmentation

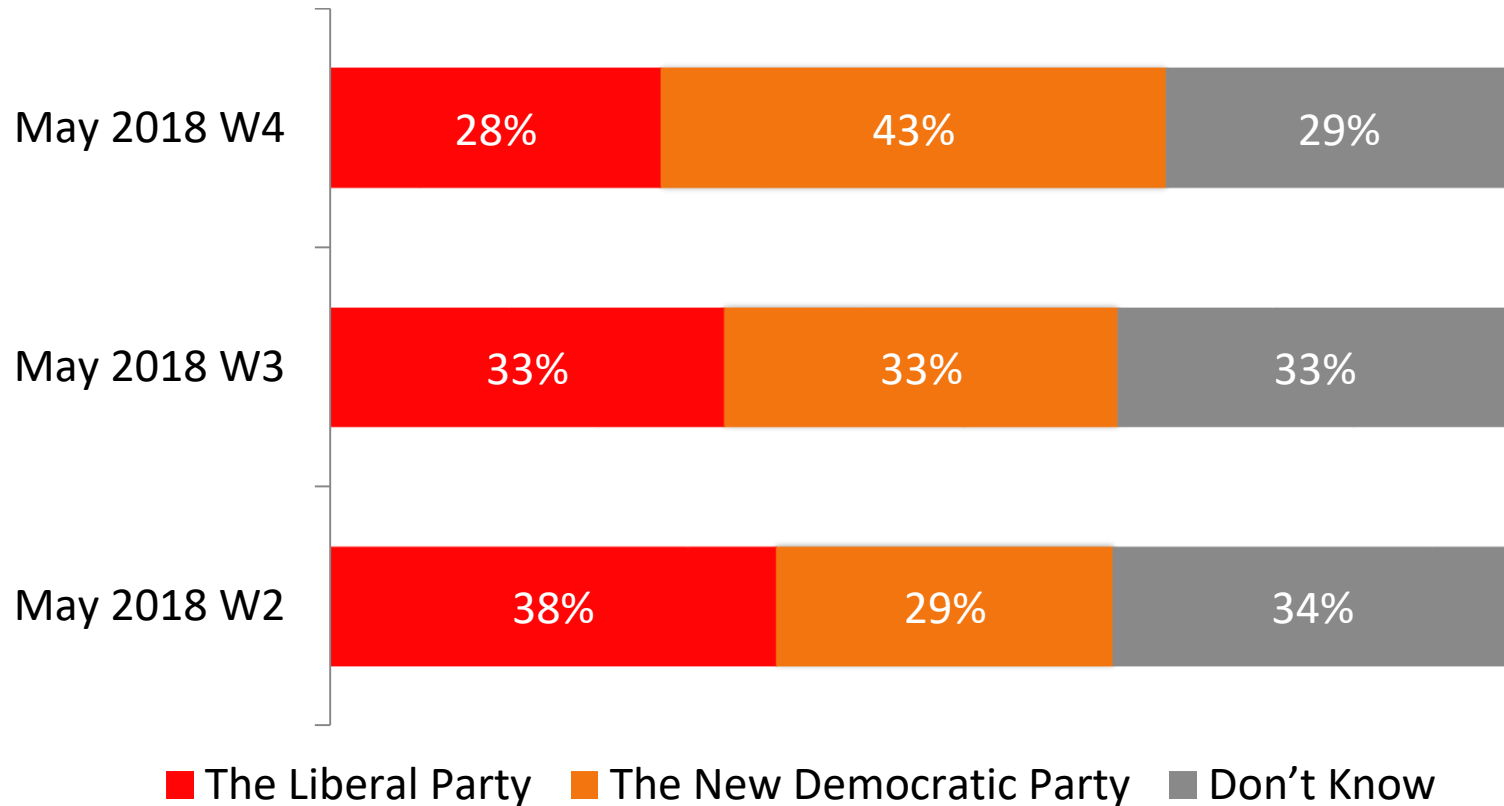| Net agreement (Total % agree minus total % disagree)	Achievers	Hopefuls	Moderate Strugglers	Heavy Strugglers	Ambivalent	Alienated
I am afraid of what Doug Ford and the PCs might do if they form government	+49%	+45%	+21%	+17%	+34%	+49%
After the past few years, I am so angry at the Ontario Liberals, I will never vote for them again	-18%	+11%	+17%	+48%	+12%	+11%
I am afraid of what Andrea Horwath and the NDP might do if they form government	+12%	+16%	+10%	+34%	+4%	-16%

Beating the PCs: 43% (up 10pts) say the NDP has a better chance of beating the PCs than the Liberals

Q Thinking about the area where you live, which party do you think has the best chance of beating the Progressive Conservatives in the upcoming provincial election?

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

	The Liberal Party	The New Democratic Party	Don't Know
May 2018 W4	28%	43%	29%
May 2018 W3	33%	33%	33%
May 2018 W2	38%	29%	34%

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Beating the PCs: Undecided battleground voters are concentrated among those unsure who would beat the PCs

*Vote among **Liberal and NDP battleground voters (n=344)** BY who they think will beat the PCs*

Who would beat the PCs?

| Column % shown	TOTAL	Liberals	NDP	Don't know
Liberal	20%	43%	12%	7%
PC	16%	15%	20%	14%
NDP	21%	23%	30%	14%
Green/other	19%	14%	23%	20%
Undecided/would not vote	24%	5%	15%	45%

Combined Vote

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May 27th Leadership Debate

Leadership Debate: More than half of those aware of the debate watched it; three quarters watched at least most of it

Q Have you read, seen or heard anything about the Ontario leader's TV debate that was held on Sunday, May 27th?
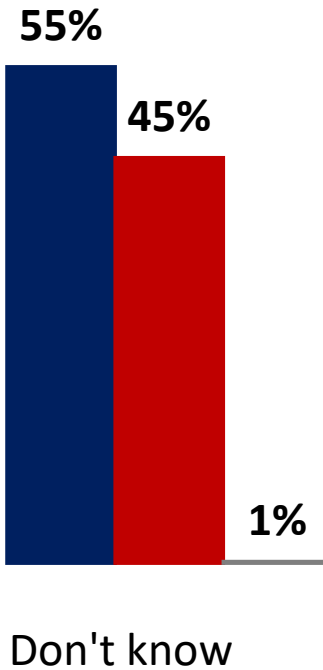[asked of all respondents, n=800]
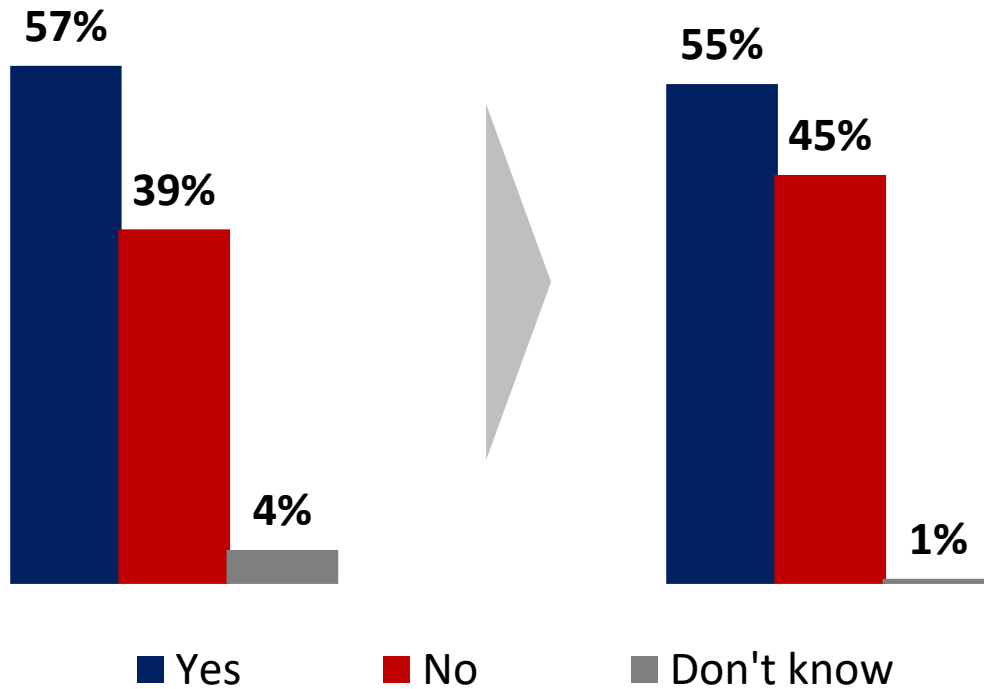
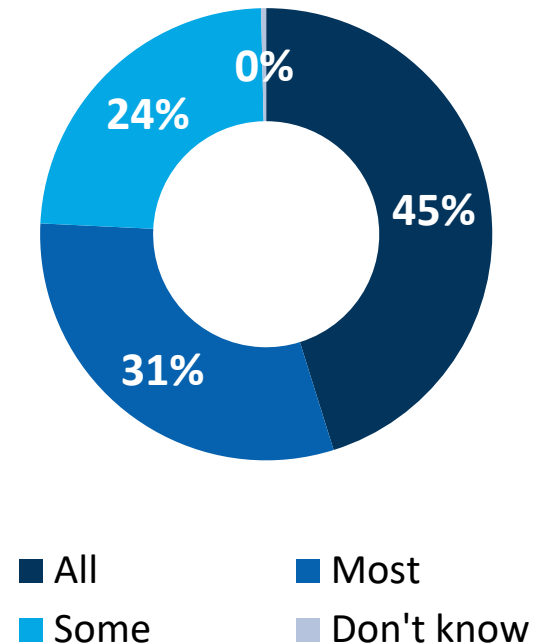**Q** Did you happen to watch the leader's debate yourself?
[asked of those who RSH; n=459]

Q Did you watch all of the debate or just some of it?
[asked of those who watched; n=252]

Chart 1 (bar): Yes 57%, No 39%, Don't know 4%

Chart 2 (bar): 55%, 45%, 1%

Chart 3 (donut): All 45%, Most 31%, Some 24%, Don't know 0%

Legend: Yes, No, Don't know
Legend: All, Most, Some, Don't know

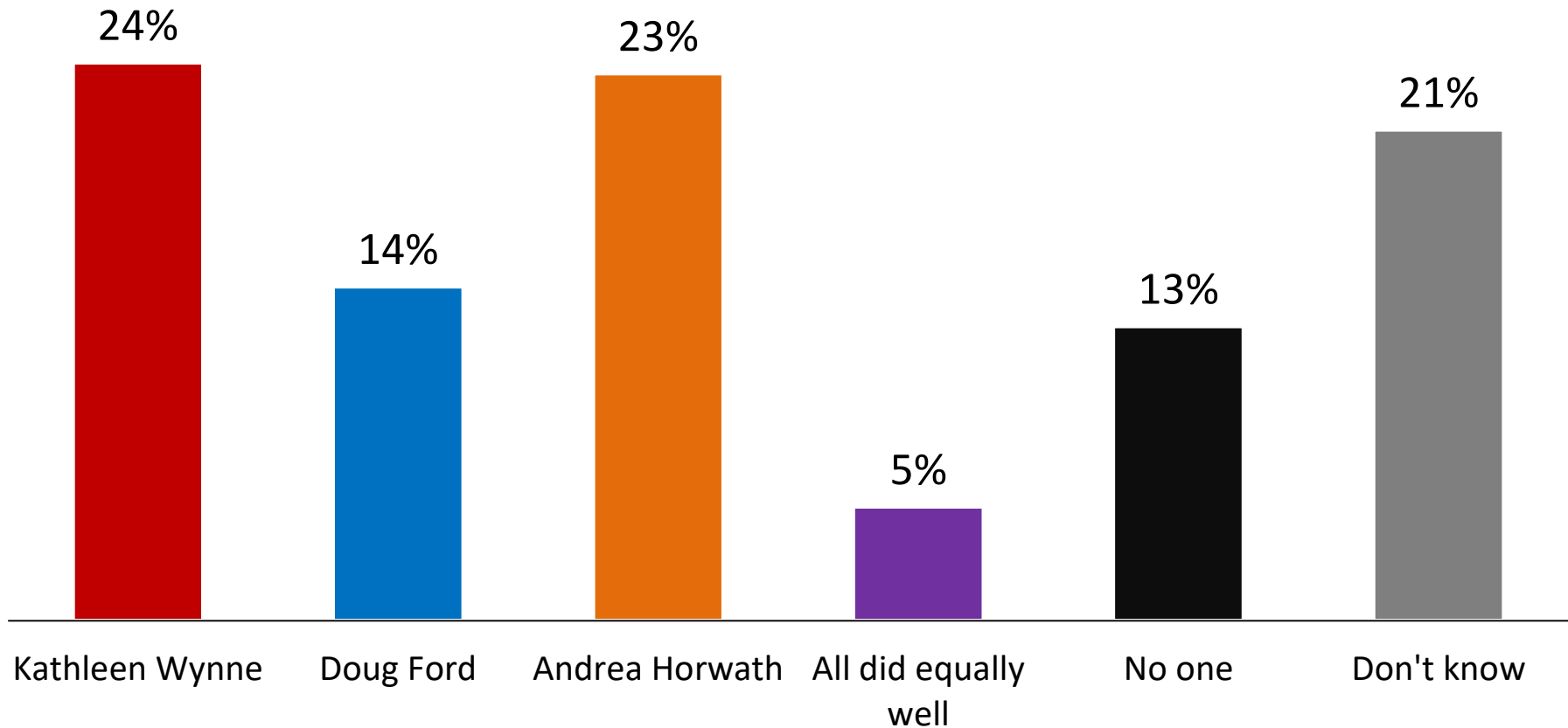INNOVATIVE RESEARCH GROUP

Who Won the Debate? Wynne and Horwath bested Ford, but one-in-five (21%) not sure who won

Q In your opinion, which leader did the best in that debate?
[asked of those who RSH; n=459]

Kathleen Wynne	Doug Ford	Andrea Horwath	All did equally well	No one	Don't know
24%	14%	23%	5%	13%	21%

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Winner by Attention: Those who watched the entire debate[26] favoured Wynne's performance over the other leaders

Q In your opinion, which leader did the best in that debate? By RSH about debate

Legend:
- Watched entire debate
- Watched at least some, but not all
- Heard about but did not watch

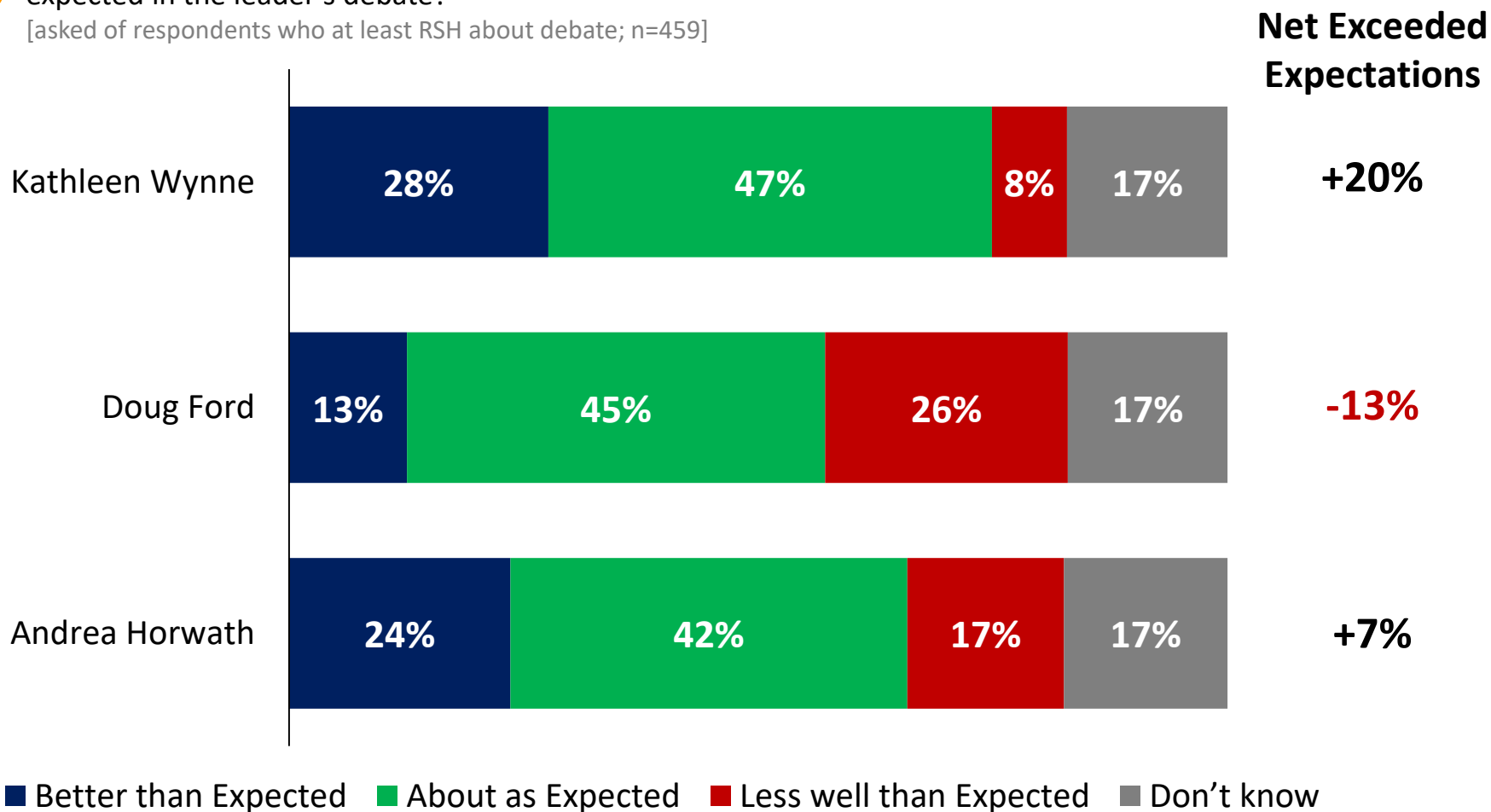| Leader	Watched entire debate	Watched at least some, but not all	Heard about but did not watch
Kathleen Wynne	42%	24%	14%
Doug Ford	18%	18%	10%
Andrea Horwath	25%	33%	17%
All did equally well	4%	8%	3%
No one	10%	14%	13%
Don't know	2%	4%	43%

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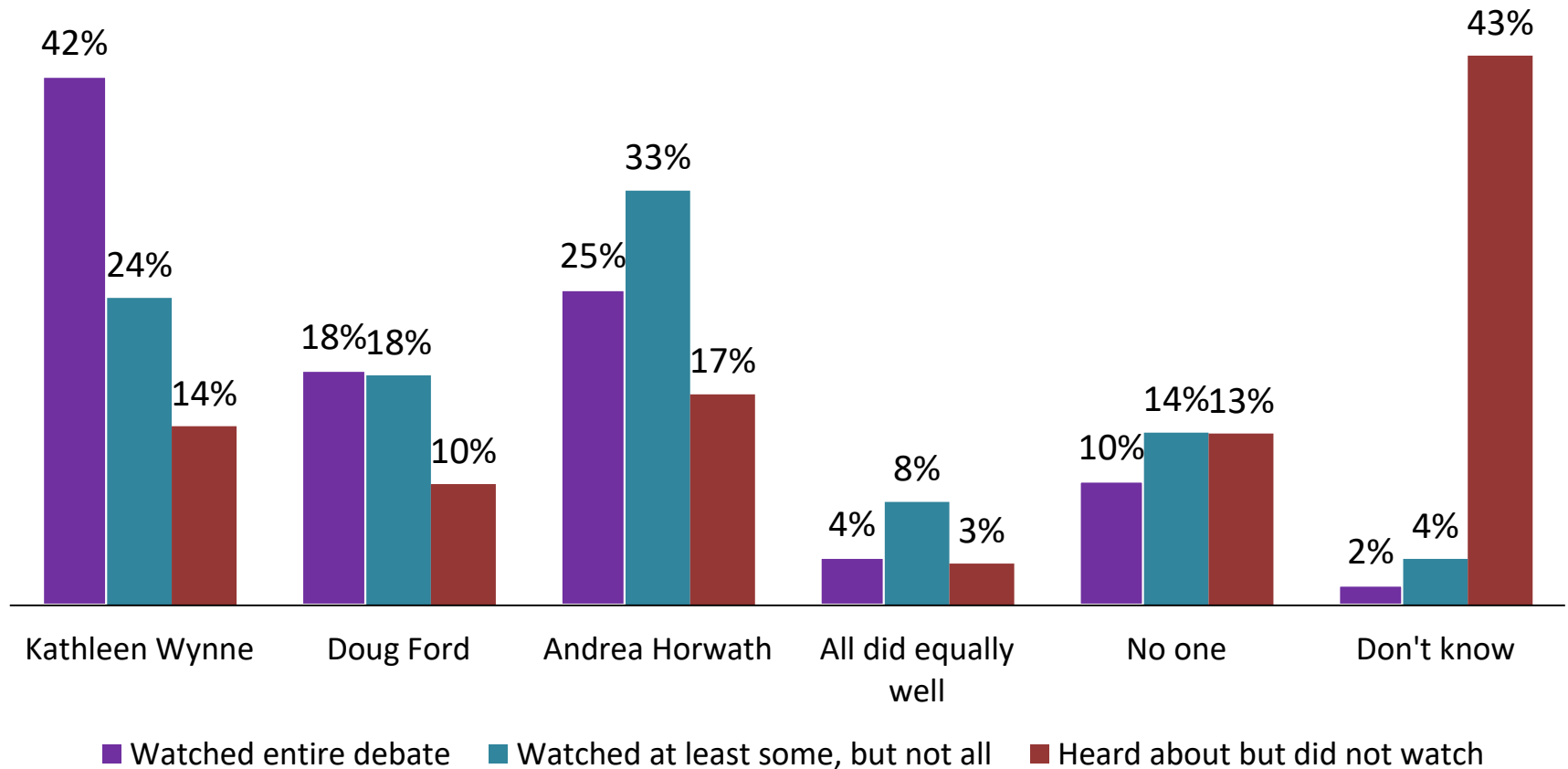
Debate Performance: Wynne did better than expected, while Ford underperformed

Q For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?
[asked of respondents who at least RSH about debate; n=459]

Net Exceeded Expectations

Leader	Better than Expected	About as Expected	Less well than Expected	Don't know	Net
Kathleen Wynne	28%	47%	8%	17%	+20%
Doug Ford	13%	45%	26%	17%	-13%
Andrea Horwath	24%	42%	17%	17%	+7%

■ Better than Expected ■ About as Expected ■ Less well than Expected ■ Don't know

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Debate Performance by Party ID: Leader performance reflects partisanship; unaligned undecided on winner

Debate Performance by Party ID – Due to small sample sizes, treat results with caution

		Party ID			
		Liberal	**PC**	**NDP**	**Unaligned**
		n=177	n=122	n=57	n=78
Did the best…	Wynne	42%	8%	17%	12%
	Ford	4%	35%	4%	11%
	Horwath	23%	12%	49%	23%
	Equal/None/Don't know	31%	44%	30%	54%
Net exceeded expectations	Wynne	+33%	+4%	+29%	+9%
	Ford	-25%	+16%	-34%	-18%
	Horwath	+14%	-13%	+31%	+8%

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Debate Performance by Value Cluster: Mixed reviews on Horwath's performance; Wynne exceeded across the board

Debate Performance by Value Cluster – Due to small sample sizes, treat results with caution

		Value Cluster					
		Deferential Conser-vatives	Populist Conser-vatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
		n=58	n=86	n=86	n=80	n=60	n=90
Did the best...	Wynne	22%	13%	33%	21%	15%	35%
	Ford	18%	36%	11%	7%	10%	4%
	Horwath	15%	10%	22%	32%	27%	33%
	Equal/None/Don't know	45%	41%	34%	40%	48%	28%
Net exceeded expectations	Wynne	+15%	+6%	+23%	+29%	+11%	+29%
	Ford	-11%	+17%	-21%	-18%	-19%	-28%
	Horwath	-12%	-20%	+11%	+19%	+16%	+24%

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Debate Performance by Alienation: Wynne exceeded expectations across all segments

Debate Performance by Economic Alienation – Due to small sample sizes, treat results with caution

Economic Alienation

		CD Achievers	CD Hopefuls	CD Moderate Strugglers	CD Heavy Strugglers	Ambivalent	Alienated
		n=77	n=67	n=81	n=52	n=70	n=112
Did the best...	Wynne	40%	32%	14%	22%	18%	20%
	Ford	11%	11%	23%	24%	17%	6%
	Horwath	17%	16%	28%	20%	23%	31%
	Equal/None/Don't know	32%	41%	35%	35%	42%	43%
Net exceeded expectations	Wynne	+31%	+19%	+12%	+20%	+19%	+18%
	Ford	-25%	-14%	-6%	+5%	-17%	-16%
	Horwath	+9%	+7%	+5%	+13%	-5%	+12%

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