

Public Opinion Research

Ontario Election: May Polling Wave 2

Vote, Leadership and Political Landscape

Field Dates: May 9th to May 12th, 2018

Sample Size: n=1500

Methodology

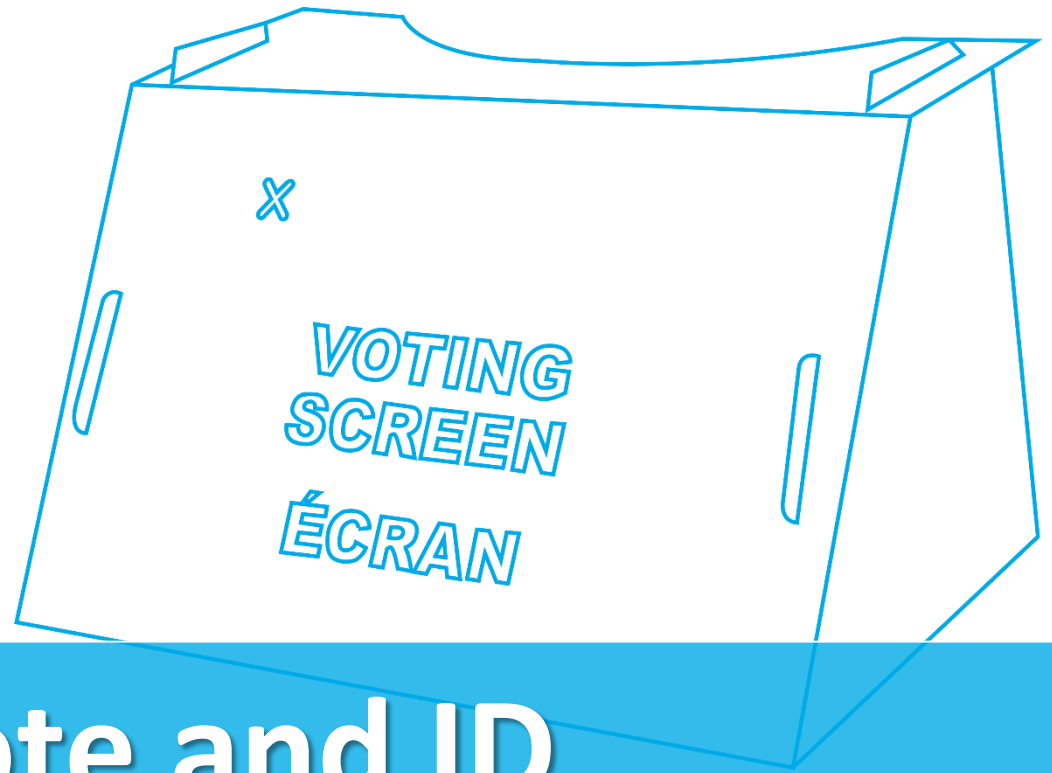
- These are the findings of a special Innovative Research Group (INNOVATIVE) online poll conducted from May 9th to May 12th, 2018 with tracking drawn for our monthly Canada This Month survey.
- This online survey of 1529 adult Ontarians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional respondents from Survey Sampling International (SSI), a leading provider of online sample. The sample is weighted to n=1,500 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:** 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

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	265	17.3%	207	13.8%
Males 35-54	283	18.5%	275	18.4%
Males 55+	182	11.9%	239	16.0%
Females 18-34	288	18.8%	211	14.0%
Females 35-54	235	15.4%	290	19.3%
Females 55+	276	18.1%	278	18.5%
Toronto	388	25.4%	314	20.9%
Rest of GTA	368	24.1%	379	25.3%
South/West	352	23.0%	393	26.2%
North/East	421	27.5%	414	27.6%



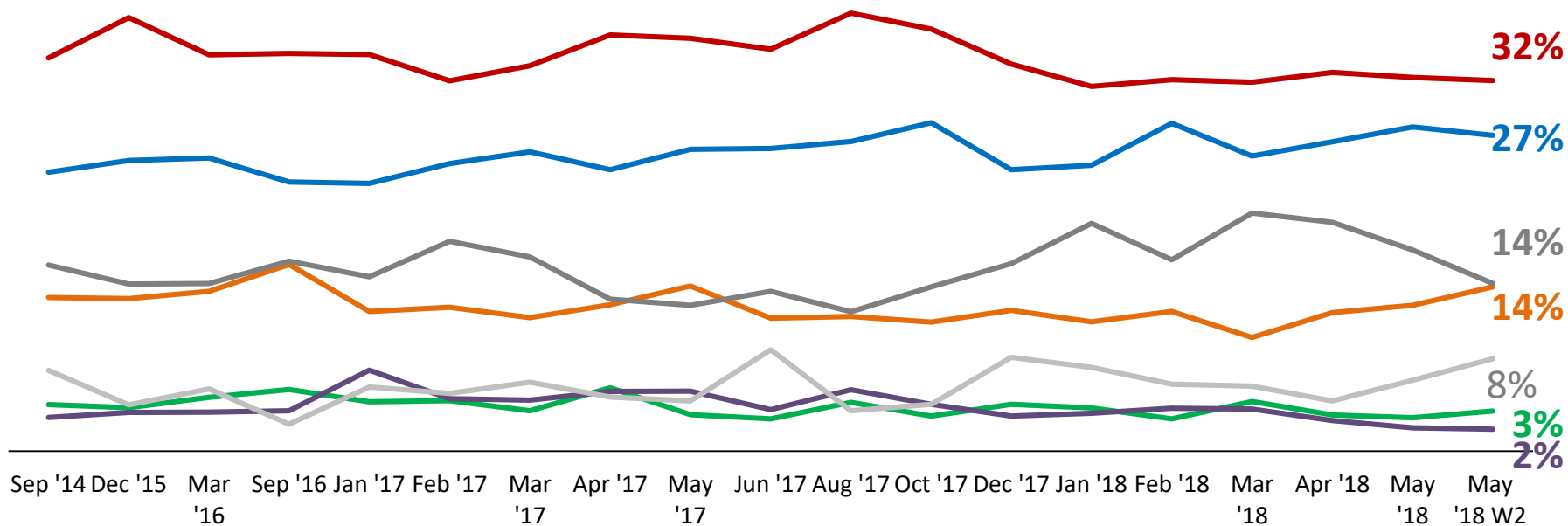
Provincial Vote and ID

Provincial ID: Liberals edge in party identification steady since campaign began, despite flagging vote numbers

Q

Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a...

[asked of all respondents; n=1500]



— Liberal

— Progressive Conservative

— NDP

— Green

— Something else

— None/Independent

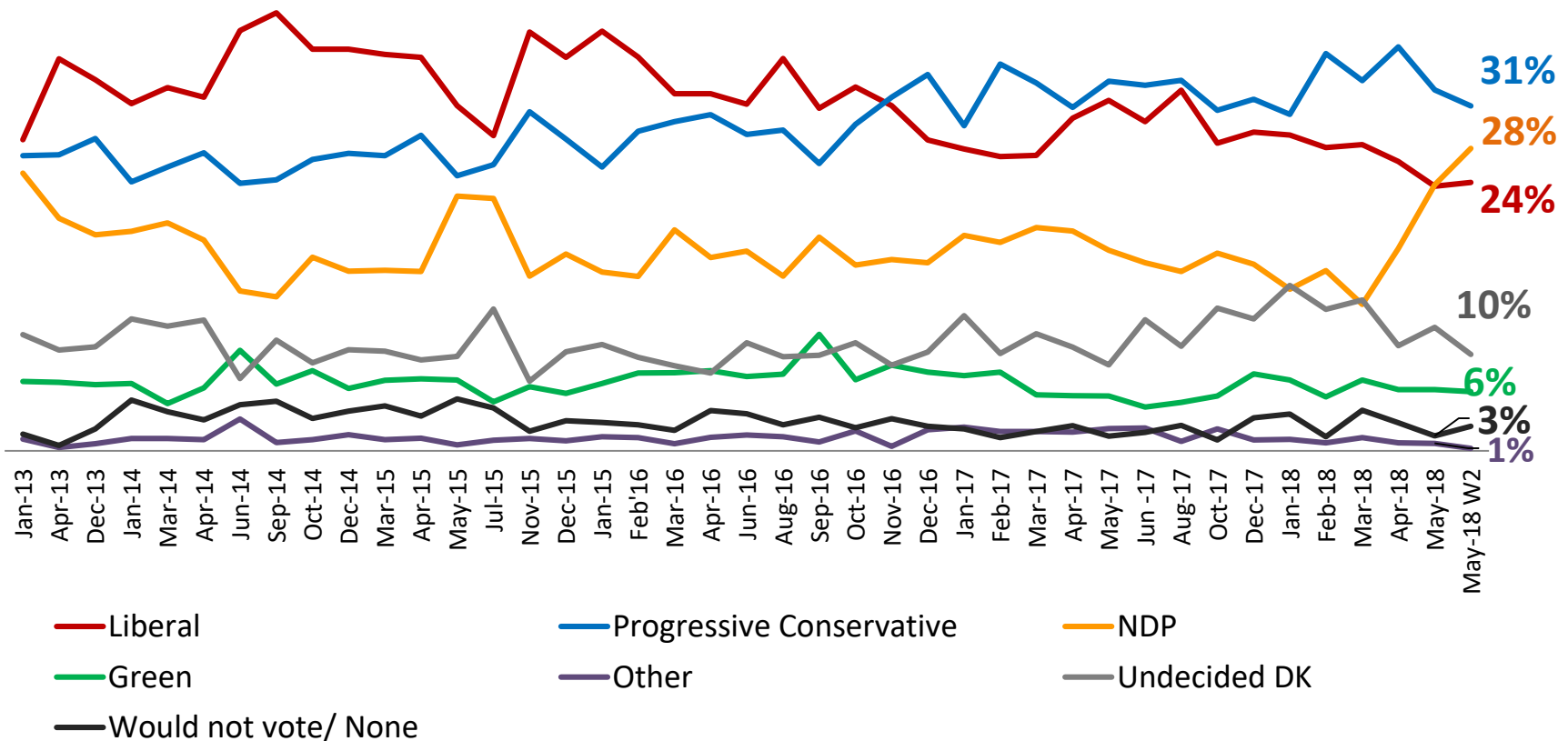
— Don't know

Combined Vote Tracking: NDP vote continuing to increase; now within 3 points of PCs in combined vote

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=1500]

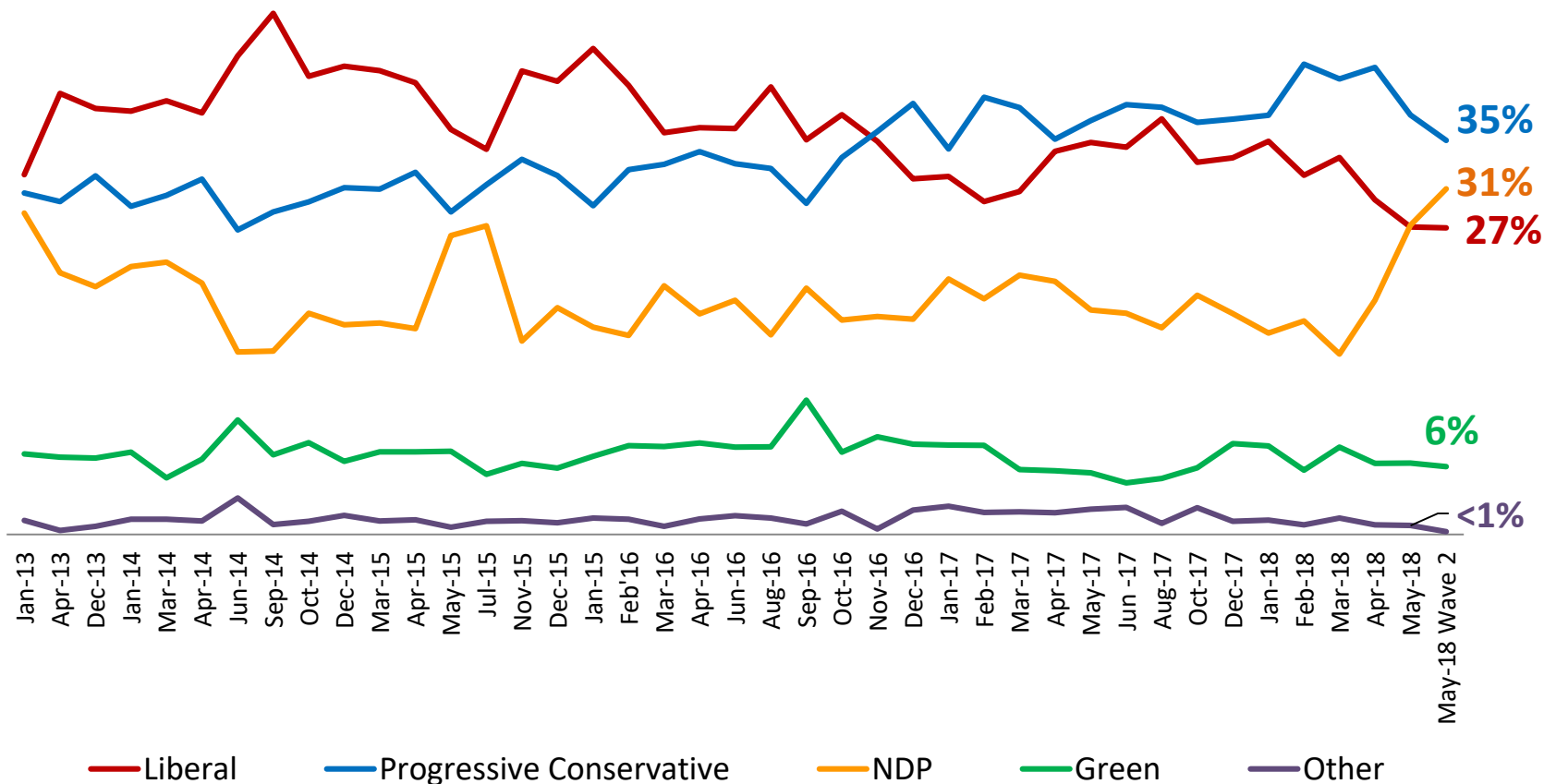


Decided Vote Tracking: NDP pulls ahead of Liberals (31% to 27%), both remain behind PCs (35%)

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=1500]



Combined Vote by Party ID: Only two-thirds of OLP identifiers are voting for them; 23% defect to the NDP

Combined Vote by Party ID

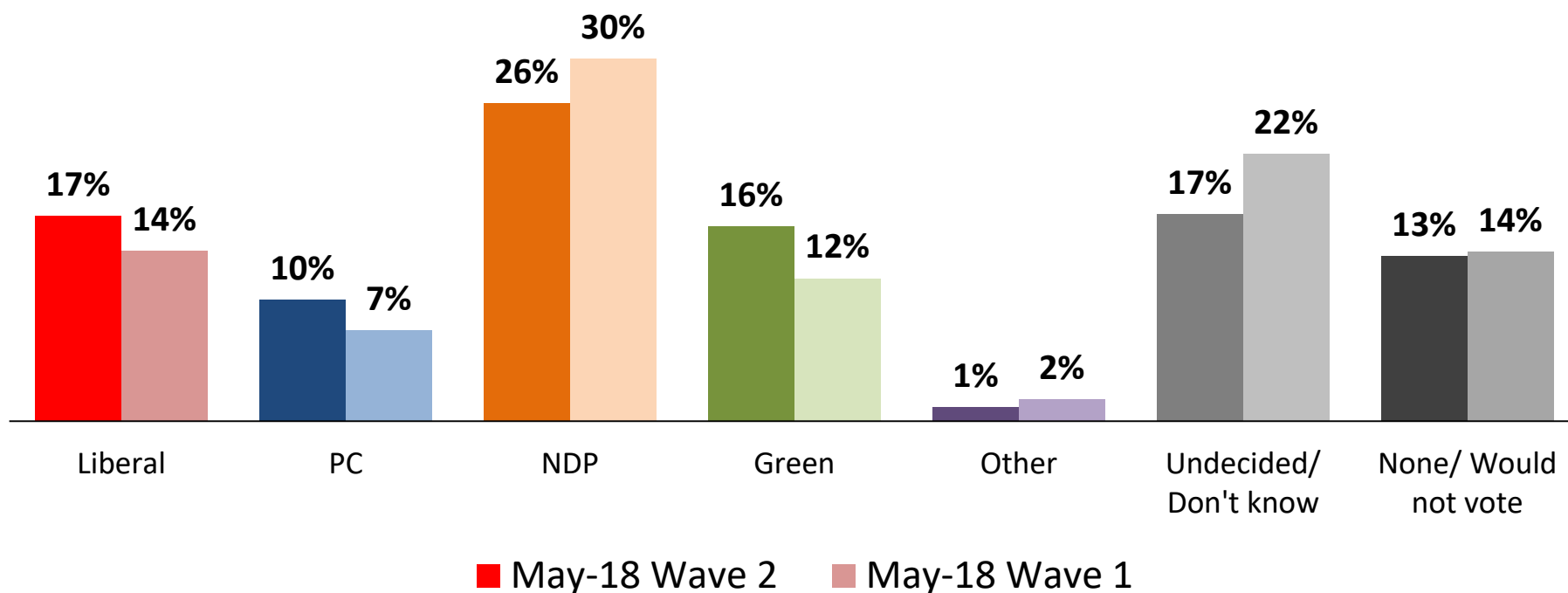
Combined Vote	Party ID					
		Liberal	Progressive Conservative	NDP	Green/Other	Unaligned
	Liberal	66%	3%	7%	8%	19%
	PC	7%	89%	3%	11%	34%
	NDP	23%	7%	88%	23%	38%
	Green	3%	1%	2%	55%	9%
	Other	0%	0%	0%	3%	0%
	Undecided/DK	66%	3%	7%	8%	19%
	Would not vote/None	7%	89%	3%	11%	34%

2nd Choice: As NDP vote increases, they are drawing on their pool of second choice supporters

Q

And which party would be your second choice?

[asked of all respondents who have a vote choice; n=1335]



2nd Choice by Vote: NDP popular second choice for OLP and PC voters, NDP voters may turn to OLP (38%) or Greens (27%)

Second choice vote by Combined vote (first choice)

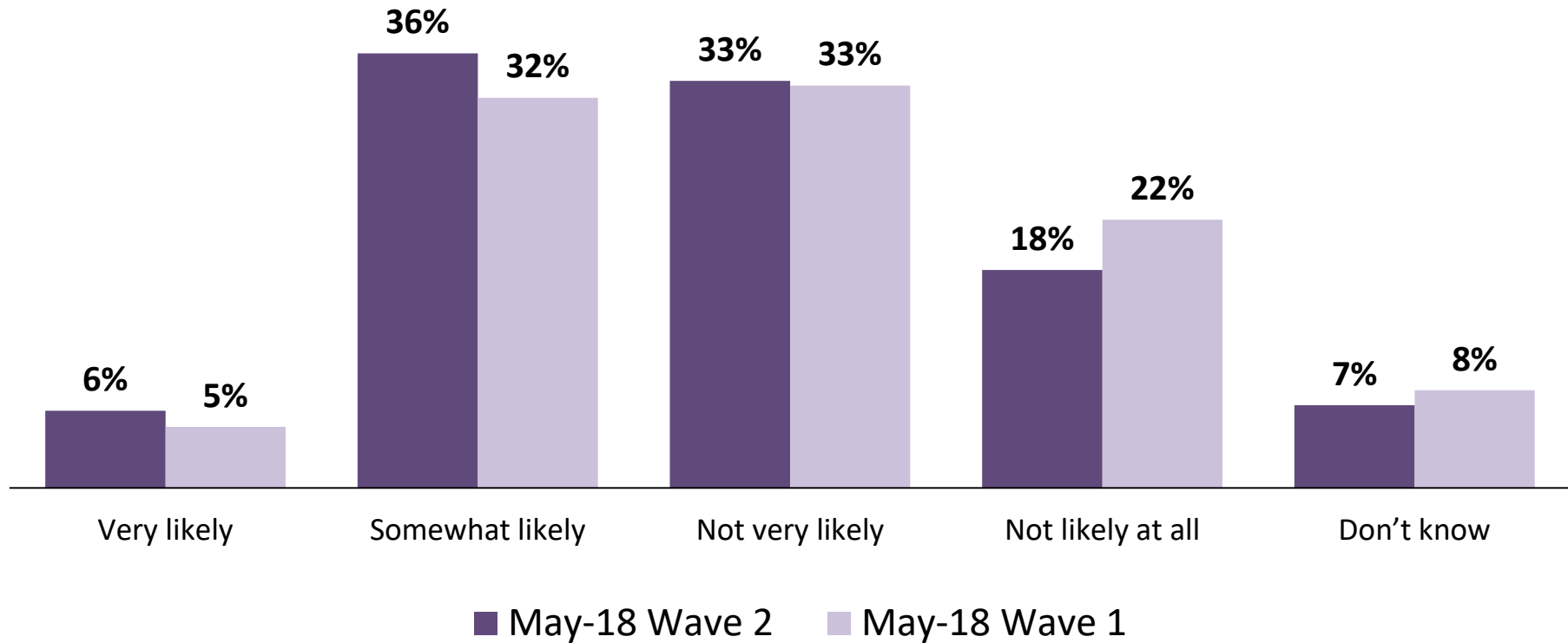
		Combined Vote			
		Liberal	Progressive Conservative	NDP	Green/Other
Second Choice	Liberal	N/A	10%	38%	20%
	PC	15%	N/A	16%	15%
	NDP	49%	29%	N/A	36%
	Green	15%	10%	27%	0%
	Other	1%	2%	1%	1%
	Undecided/DK	13%	24%	12%	18%
	Would not vote/None	8%	25%	6%	10%

Voting for second choice: Likelihood of to switch up marginally since previous May data

Q

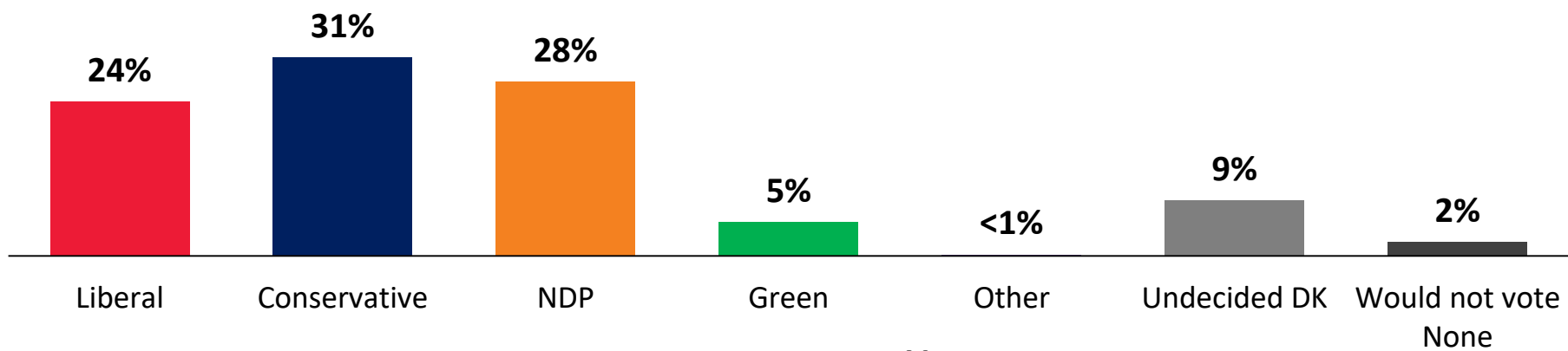
How likely is it you may change your mind and vote for your second choice ?

[asked of all respondents who have a second choice; n=929]



Likelihood by Vote: A near majority of OLP voters say they are likely to switch their vote (48%), PC voters most steadfast

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=1500]



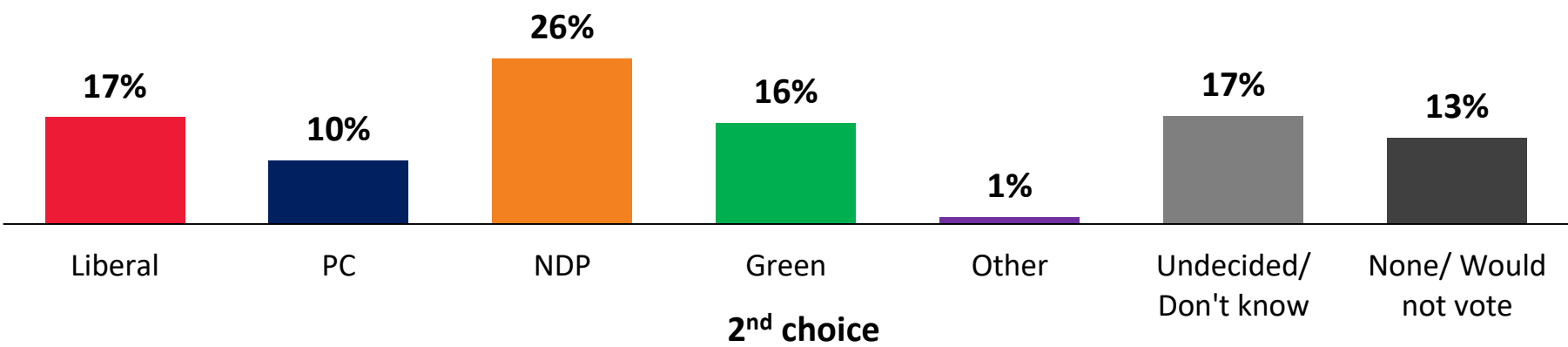
Likelihood to vote 2nd choice

	Vote				
	Overall	Liberal	PC	NDP	Green/Other
Very likely	6%	8%	4%	7%	5%
Somewhat likely	36%	40%	27%	35%	50%
Not very likely	33%	30%	39%	34%	21%
Not likely at all	18%	14%	22%	18%	18%
Don't know	7%	7%	8%	5%	6%
Net Likely	-9%	+5%	-30%	-11%	+16%

Likelihood by 2nd Choice: 26% of voters are considering the NDP, but few are very likely to switch their vote



And which party would be your second choice?
[asked of all respondents who have a vote choice; n=929]



Likelihood to vote 2nd choice

	Overall	Liberal	PC	NDP	Green/Other
Very likely	6%	7%	13%	4%	5%
Somewhat likely	36%	40%	43%	35%	28%
Not very likely	33%	32%	22%	34%	40%
Not likely at all	18%	14%	13%	19%	23%
Don't know	7%	6%	9%	8%	4%
Net Likely	-9%	1%	21%	-14%	-30%



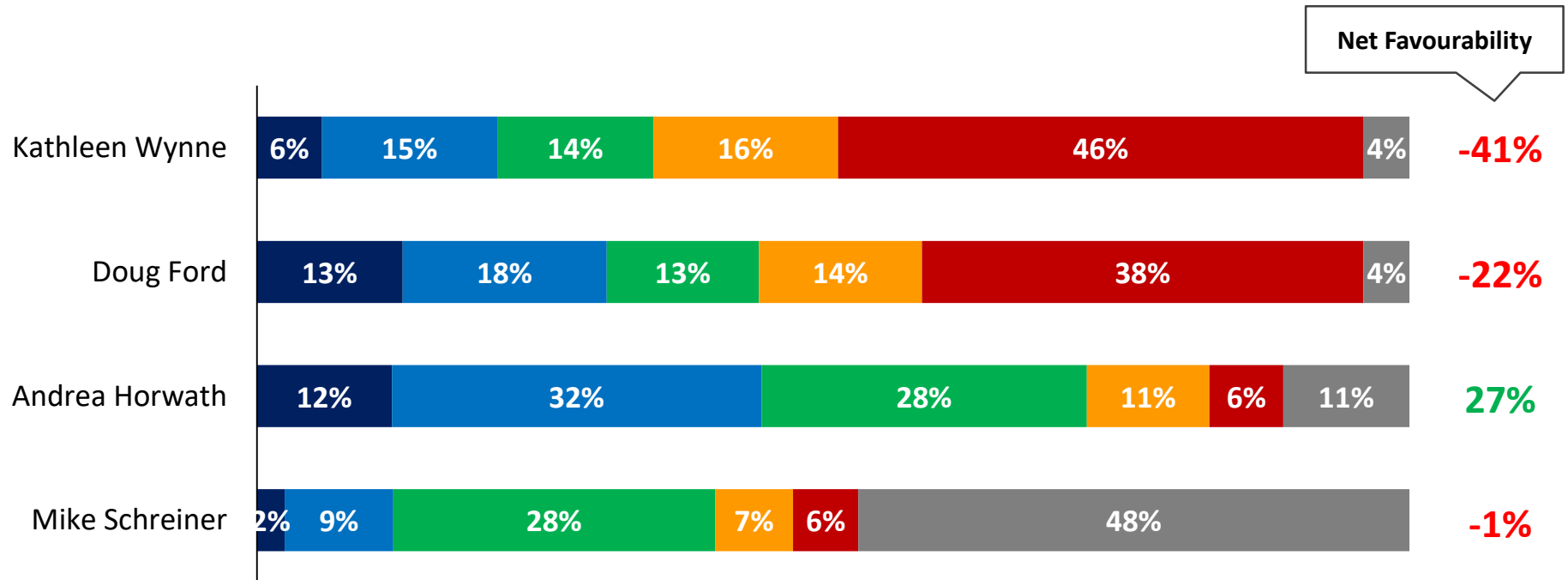
Party Leaders

Leader Favourables: Near majority feel very unfavourable toward Wynne, net favourability 19-points lower than Ford

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate 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 choose that response. How about...?

[asked of all respondents; n=1500]



Very favourable

Neither favourable nor unfavourable

Very unfavourable

Somewhat favourable

Somewhat unfavourable

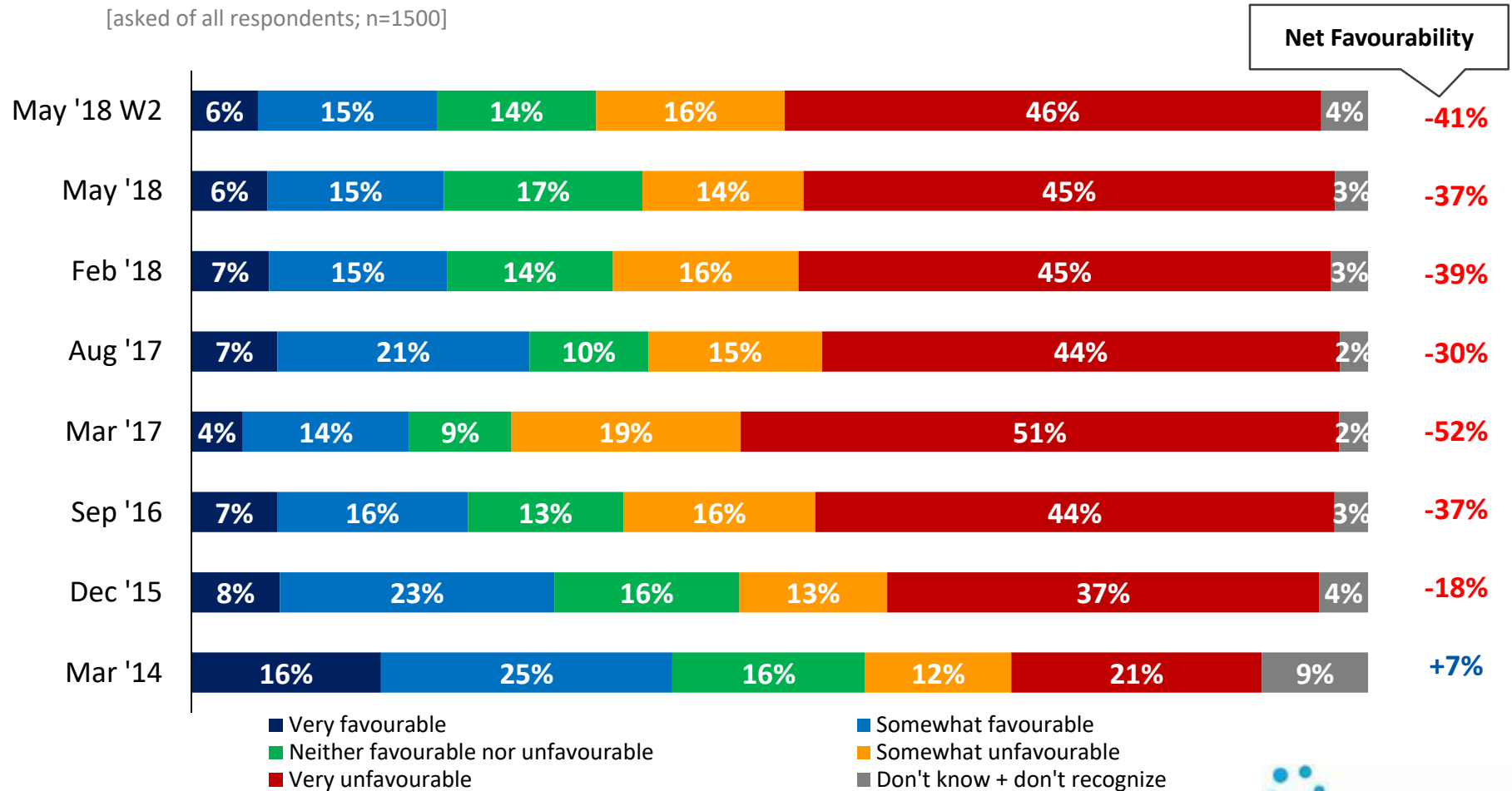
Don't know + don't recognize

Kathleen Wynne: Nearly half (46%) say 'very' unfavorable, net favourability down from earlier this month

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate 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 choose that response. How about...**Kathleen Wynne, leader of Ontario Liberal Party**

[asked of all respondents; n=1500]



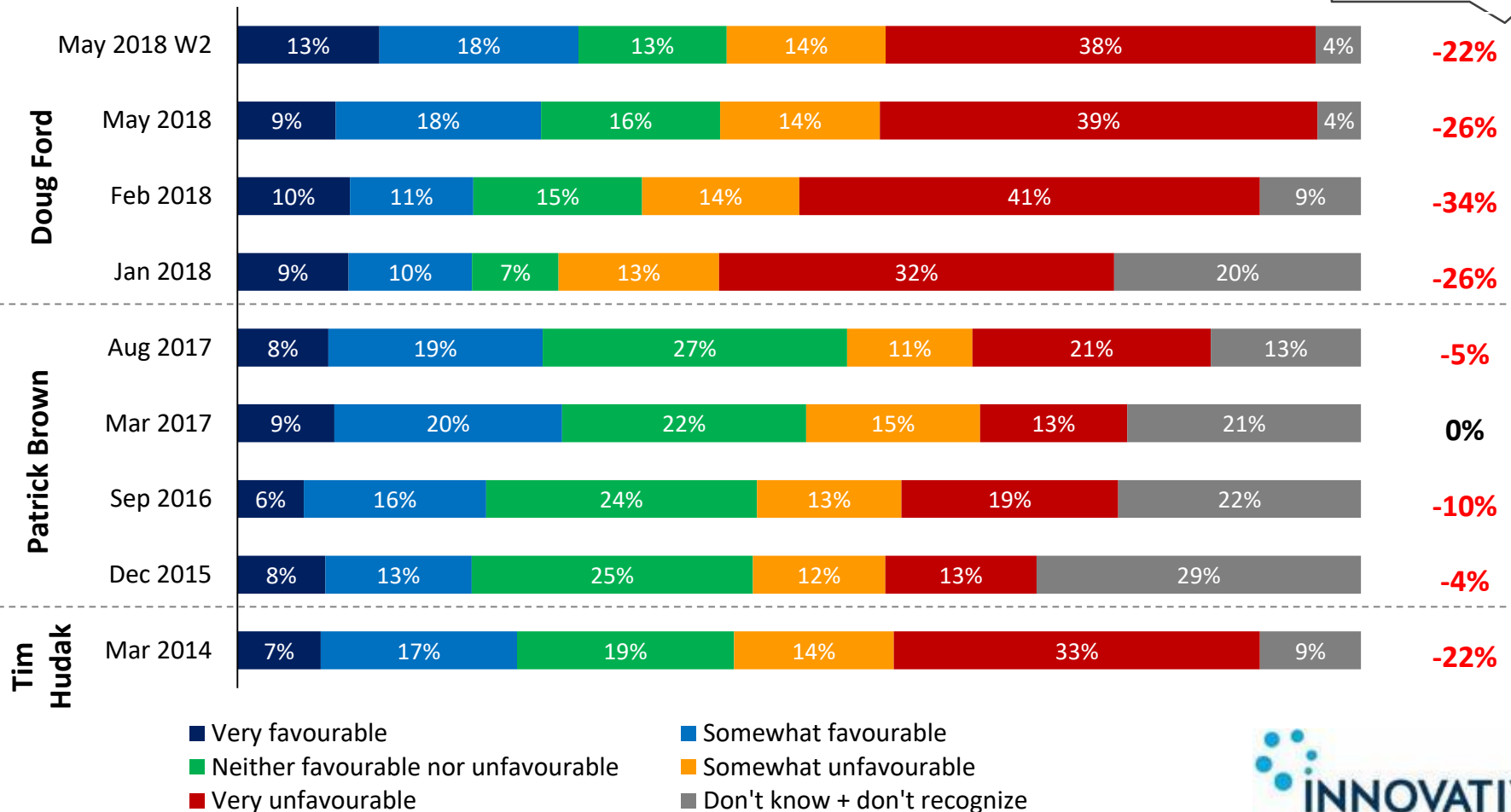
Doug Ford: Net favourability remains negative, but up 4-points from earlier this month to -22%

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate 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 choose that response. How about...**Doug Ford, leader of the Ontario PCs**

[asked of all respondents; n=1500]

Net Favourability



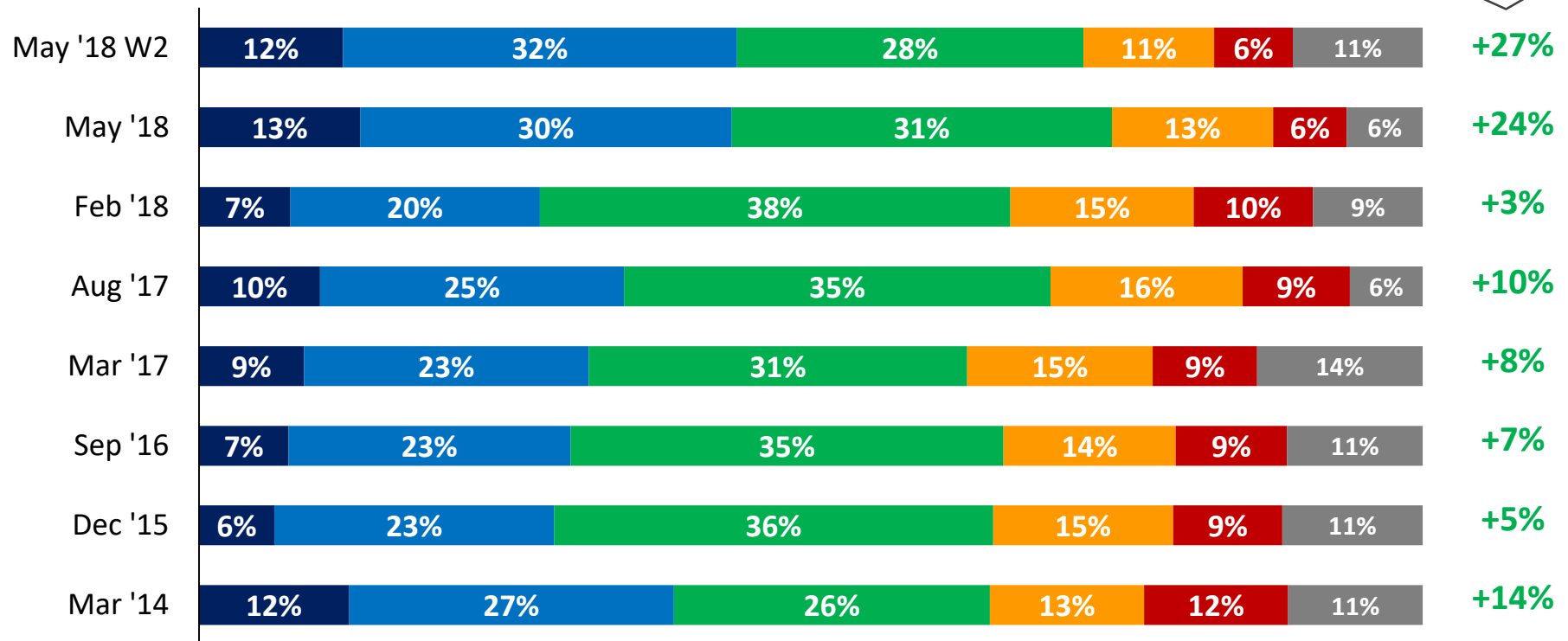
Andrea Horwath: Favourability up dramatically from Feb; 44% now feel positively

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate 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 choose that response. How about...**Andrea Horwath, Leader of the Ontario NDP**

[asked of all respondents; n=1500]

Net Favourability



Very favourable

Neither favourable nor unfavourable

Very unfavourable

Somewhat favourable

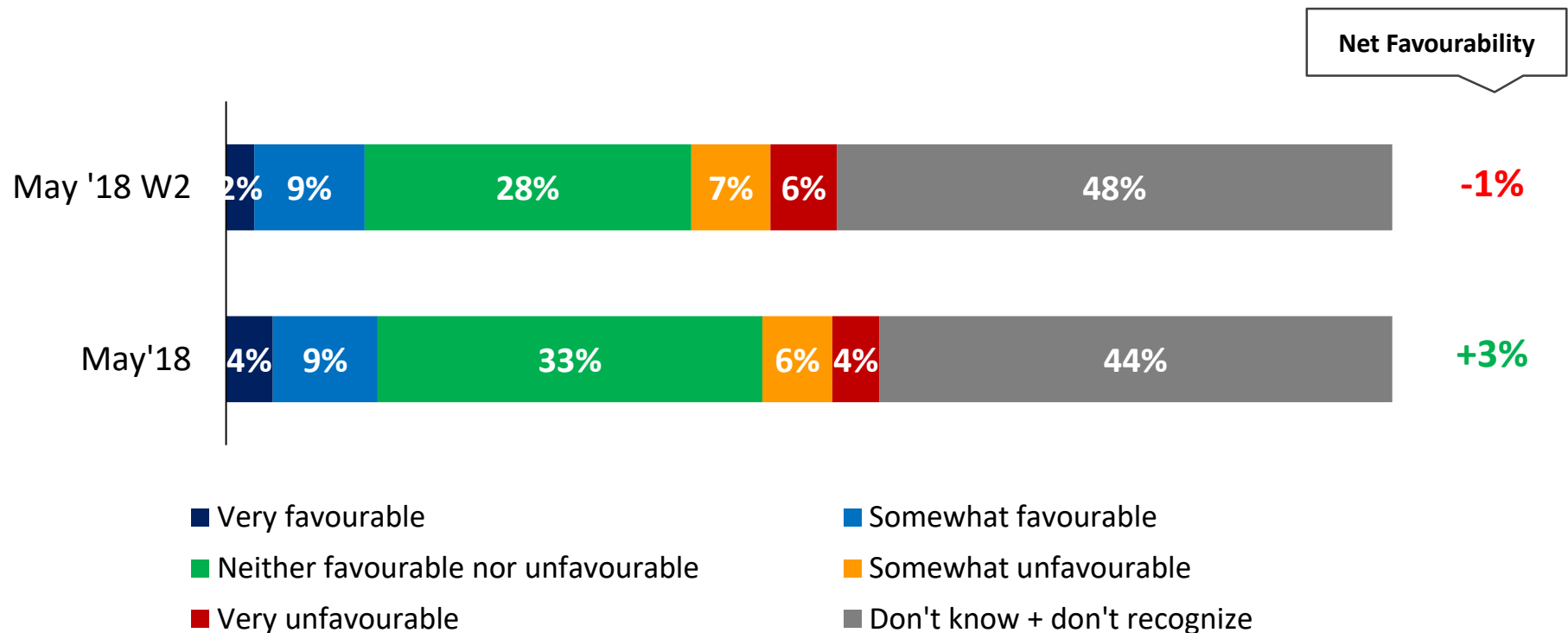
Somewhat unfavourable

Don't know + don't recognize

Mike Schreiner: Nearly half don't know or don't recognize, another 3-in-10 feel neutral toward the Green leader

Q

Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate 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 choose that response. How about... **Mike Schreiner, Leader of the Ontario Green Party**
[asked of all respondents; n=1500]



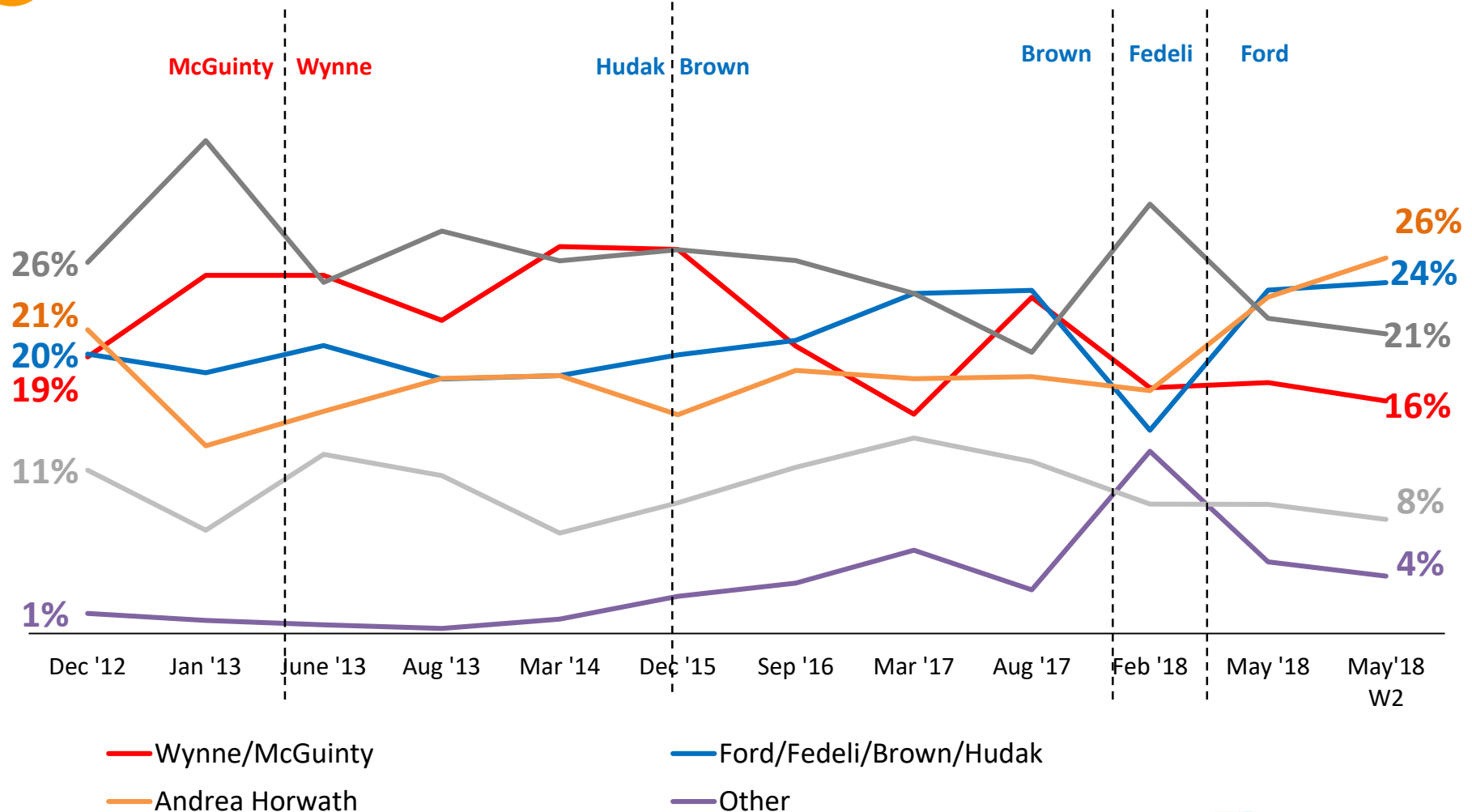
Best Premier: Horwath pulls ahead of Ford, each pulling in about 1-in-4 voters, just 1-in-6 say Wynne best for the job

20

Q

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

[asked of all respondents; n=1500]



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

Time for Change Attitudes

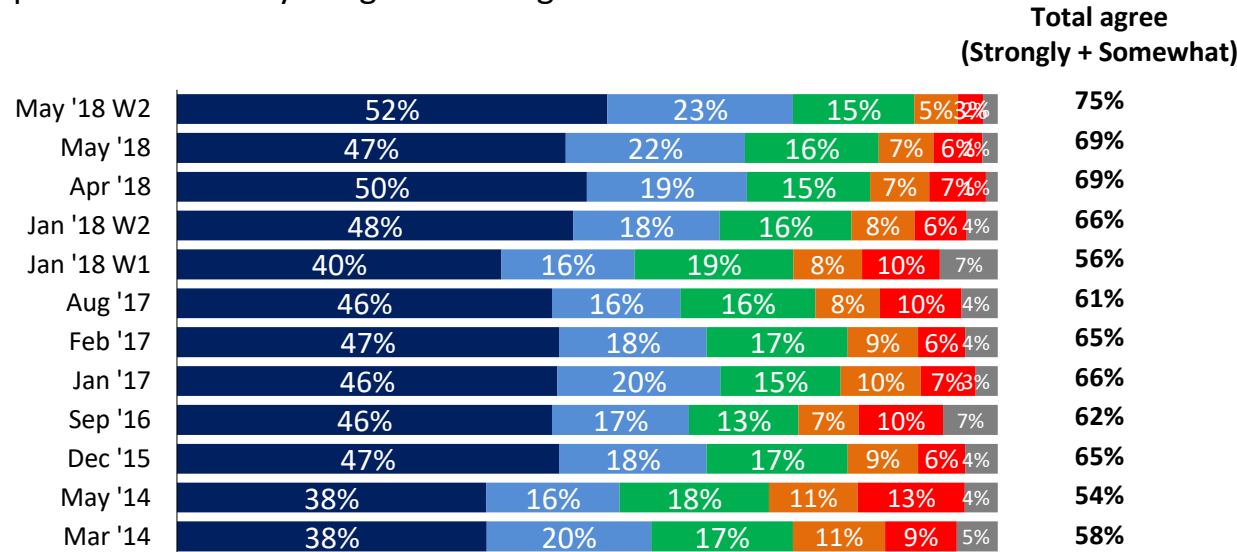
Time for Change tracking: 3-in-4 think its time for a change, including more than half who strongly agree (52%) ²²

Q

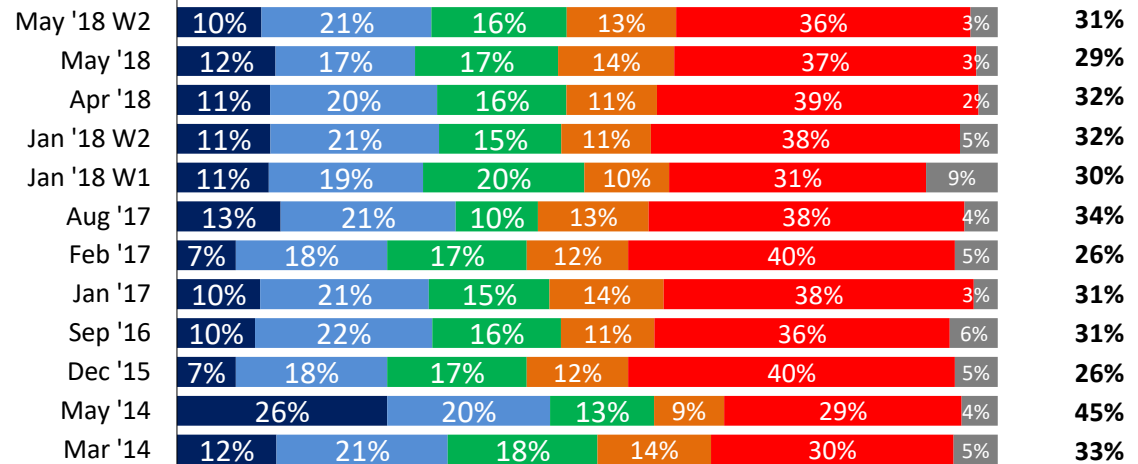
For each of the following statements please indicate if you agree or disagree?

[asked of all respondents; n=1500]

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



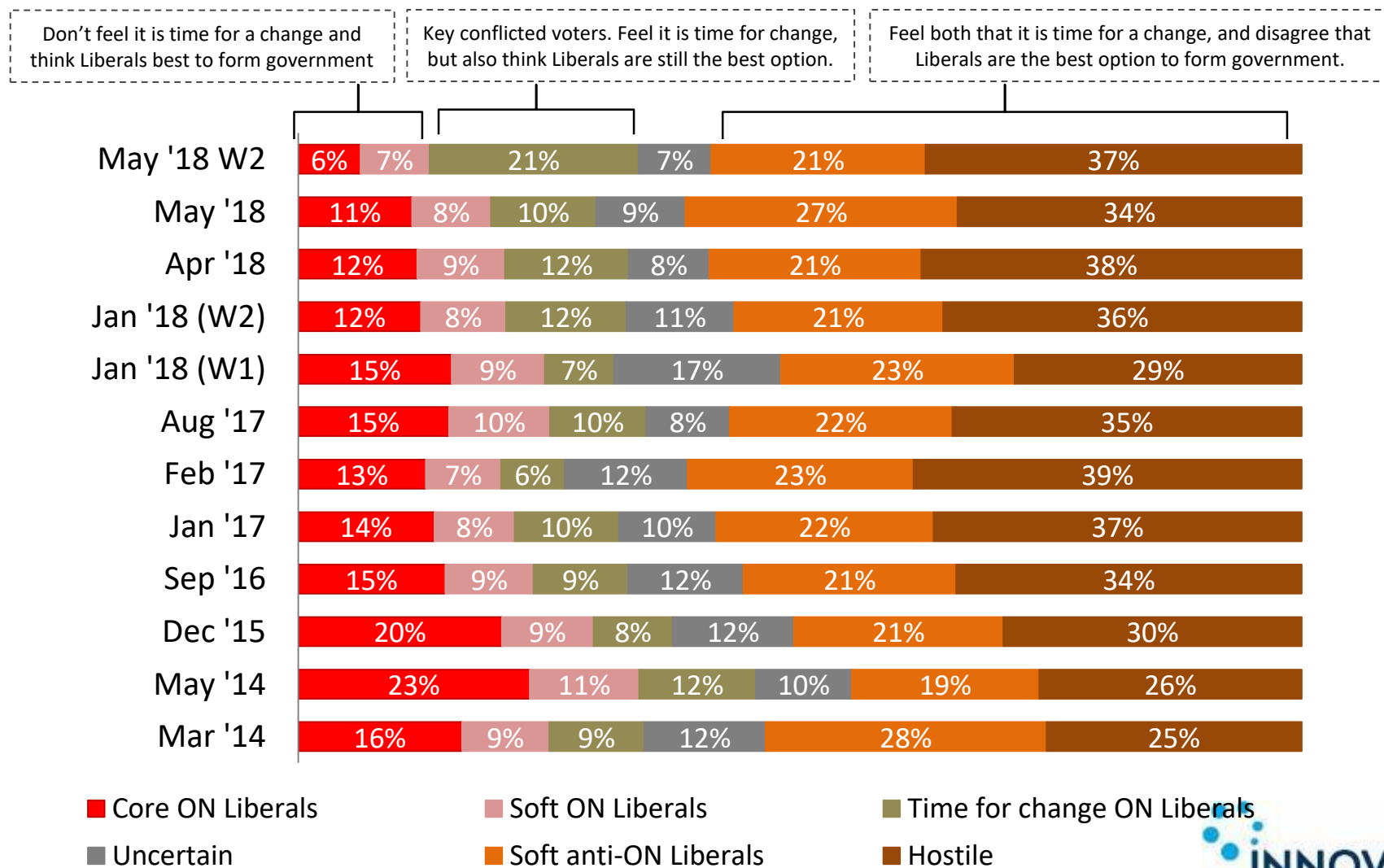
Strongly agree
Somewhat disagree

Somewhat agree
Strongly disagree

Neither agree nor disagree
Don't know

Time for Change Tracking: Many core or soft ON Liberal backers now appear to be conflicted as TfC sentiment rises

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 change: NDP making slow but steady gains among anti-Liberal segments and core Liberal supporters

24

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

Combined Vote	Column % shown	Core ON Liberals			Soft ON Liberals			Time for change ON Liberals			Uncertain			Soft anti-ON Liberals			Hostile		
		May '18 (2)	May '18 (1)	Mar '14	May '18 W2	May '18	Mar '14	May '18 W2	May '18	Mar '14	May '18 W2	May '18	Mar '14	May '18 W2	May '18	Mar '14	May '18 W2	May '18	Mar '14
	Liberal	85%	88%	89%	61%	78%	64%	57%	39%	61%	19%	17%	21%	6%	9%	7%	1%	0%	1%
	Progressive Conservative	1%	1%	0%	2%	0%	5%	10%	17%	6%	7%	5%	9%	24%	26%	31%	63%	68%	64%
	NDP	11%	9%	6%	20%	17%	17%	22%	30%	23%	19%	18%	20%	44%	37%	38%	27%	22%	20%
	Green	3%	0%	3%	4%	3%	11%	6%	6%	6%	7%	12%	6%	10%	9%	7%	3%	3%	6%
	Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	2%	0%	0%	1%	1%	2%	2%
	Undecided/D on't know	1%	2%	2%	12%	2%	4%	4%	8%	4%	34%	41%	26%	14%	18%	13%	4%	5%	6%
	Would not vote/none	0%	1%	1%	1%	0%	0%	2%	0%	0%	14%	7%	17%	1%	2%	2%	1%	0%	1%

Note: "Don't know" not shown due to insufficient sample size.

Two-Horse Race: Agreement down since earlier this month and down dramatically compared to last election

25

Q

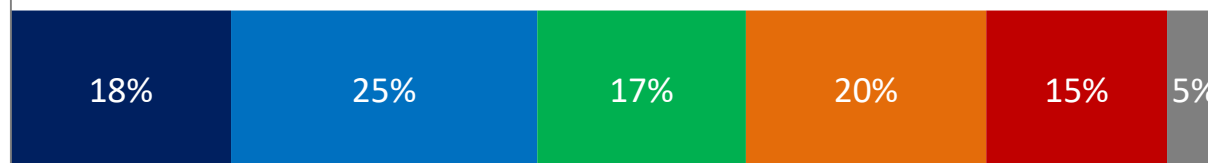
For each of the following statements please indicate if you agree or disagree?

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=1500]

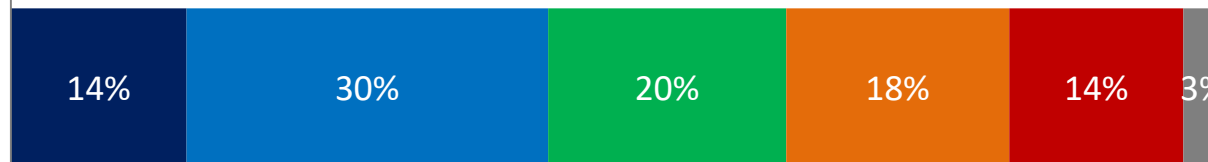
**Net agree
(Agree - Disagree)**

May '18 W2



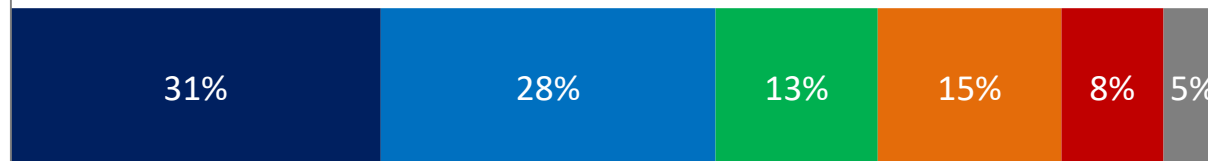
+9%

May '18



+12%

May '14



+35%

Strongly agree

Somewhat agree

Neither agree nor disagree

Somewhat disagree

Strongly disagree

Don't know

Two-Horse Race: NDP support highest among those who strongly disagree, those who agree most likely to vote PC

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. **BY** Combined Vote
[asked of all respondents; n=1500]

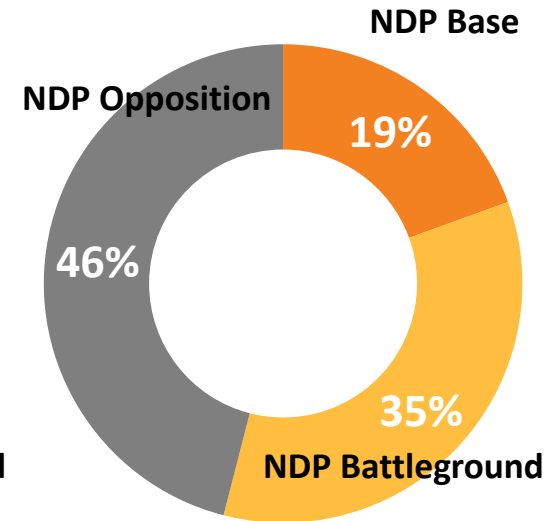
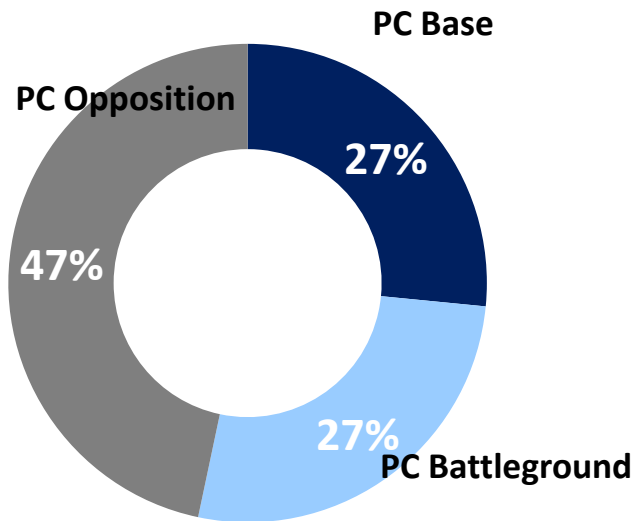
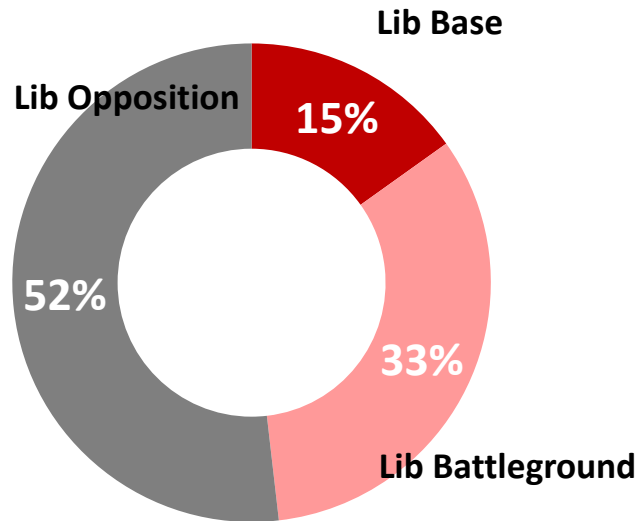
Two-horse race – May 2018 Wave 1 vs. Wave 2

Combined Vote	Column % shown	Strongly agree		Somewhat agree		Neither agree nor disagree		Somewhat disagree		Strongly disagree	
		W2	W1	W2	W1	W2	W1	W2	W1	W2	W1
	Liberal	36%	31%	29%	25%	22%	22%	25%	30%	10%	11%
	Progressive Conservative	42%	48%	35%	40%	32%	29%	25%	23%	25%	25%
	NDP	15%	13%	21%	18%	18%	19%	40%	33%	53%	54%
	Green	2%	5%	7%	7%	5%	5%	6%	3%	5%	5%
	Other	0%	1%	0%	0%	0%	1%	0%	1%	0%	0%
	Undecided/Don't know	3%	3%	7%	10%	19%	21%	3%	10%	5%	5%
	Would not vote/none	1%	0%	1%	1%	4%	4%	0%	1%	2%	0%

Note: "Don't know" not shown due to insufficient sample size.

Party Voter Pools: PCs have the largest base, followed by the NDP. Both parties have more than half as base/battleground

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



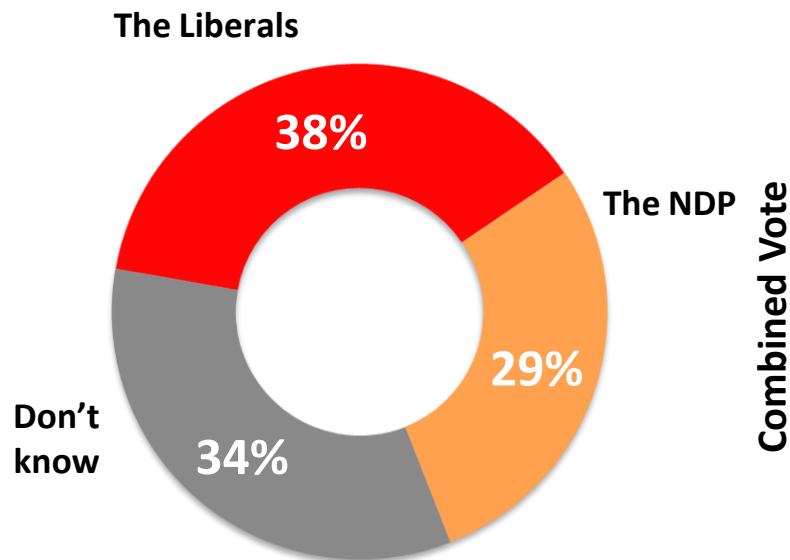
Beating the PCs: More think the OLP can beat the PCs locally²⁸ than think the NDP, but a third don't know (34%)

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=1500]

Among all respondents



Who will Liberal and NDP battleground voters vote for? BY who they think will beat the PCs

Who would beat the PC?

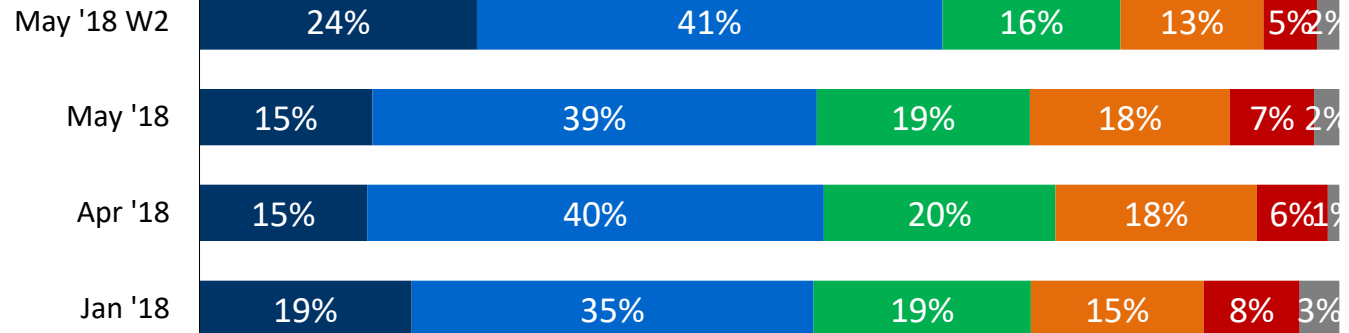
Column % shown	TOTAL	Liberals	NDP	Don't know
Liberal	24%	38%	18%	12%
PC	12%	13%	18%	8%
NDP	21%	23%	35%	9%
Green/other	14%	13%	18%	14%
Undecided/ would not vote	28%	13%	12%	56%

Alienation Segmentation

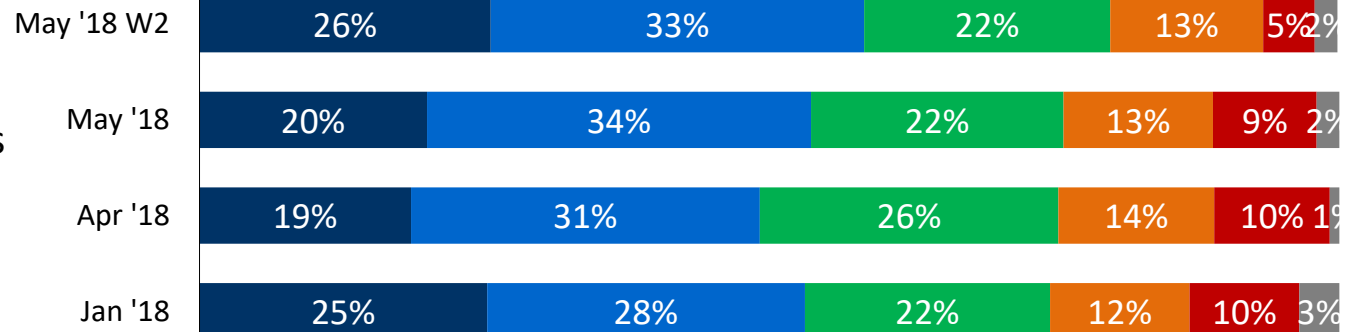
Economic Values Tracking: These two value statements define economic alienation segmentation we can track over time

Q 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



■ Strongly agree

■ Somewhat agree

■ Neither agree nor disagree

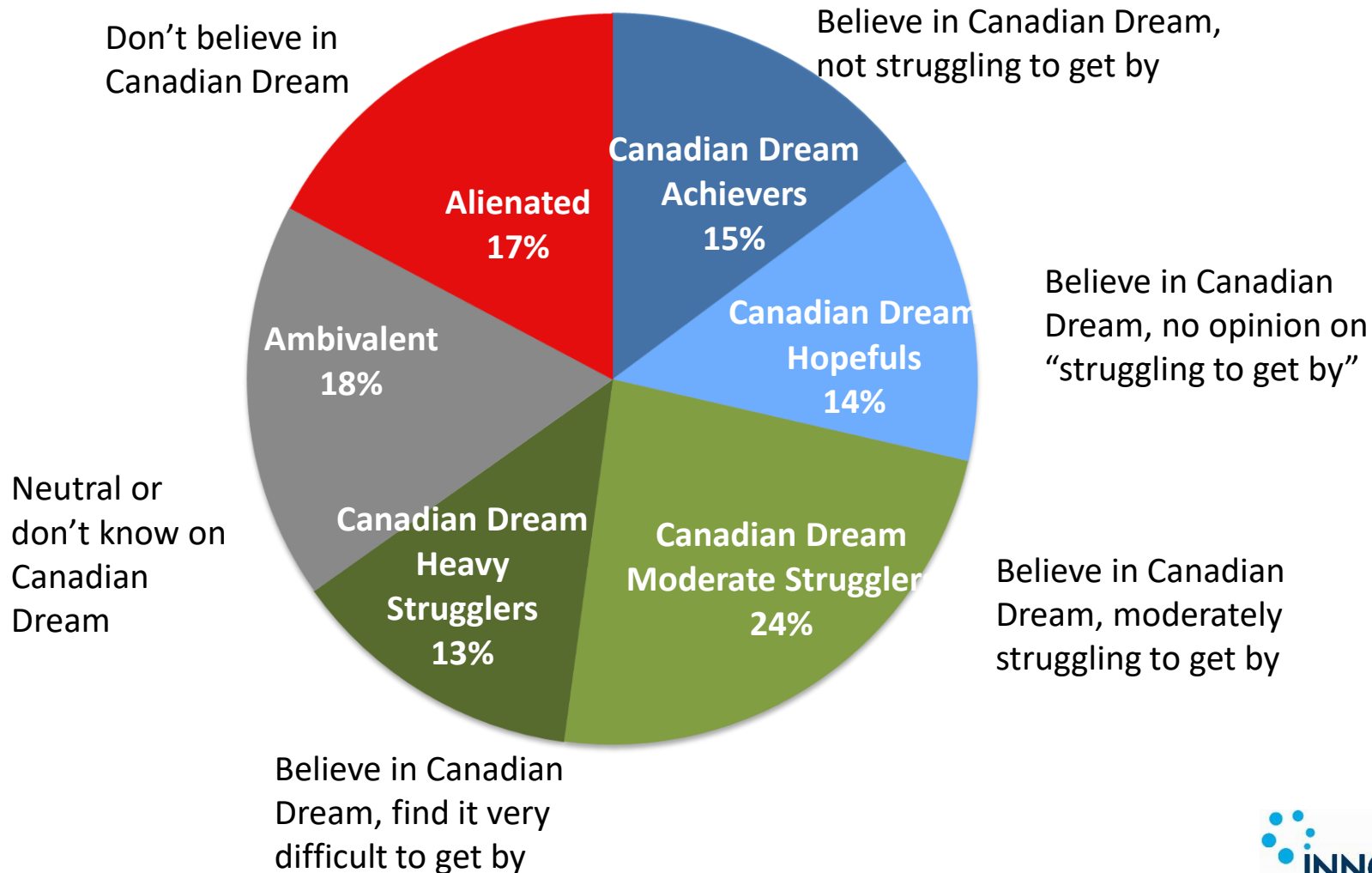
■ Somewhat disagree

■ Strongly disagree

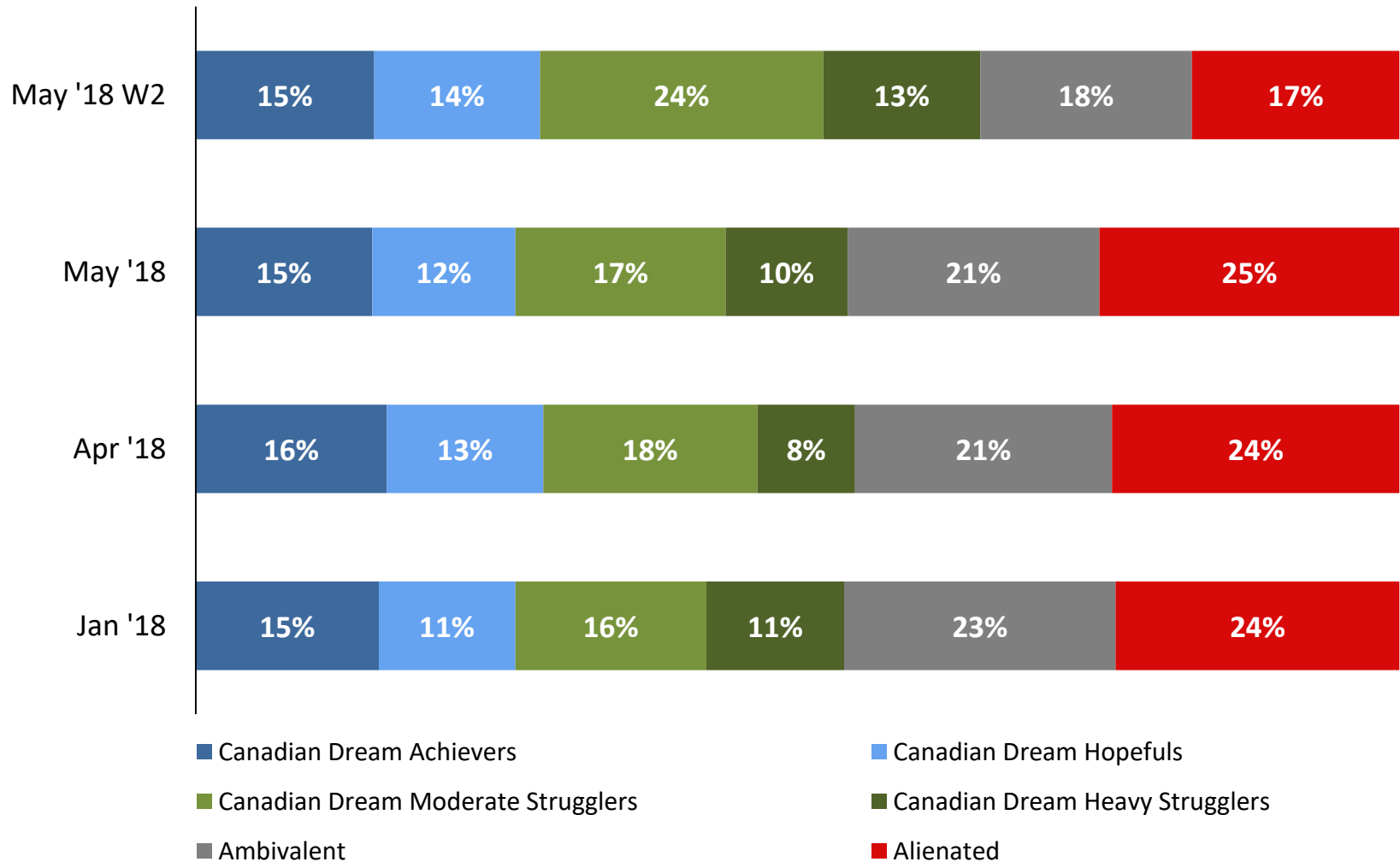
■ Don't know

Economic Alienation Segmentation: More than a third believe in the Canadian dream, but are struggling to get by

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.

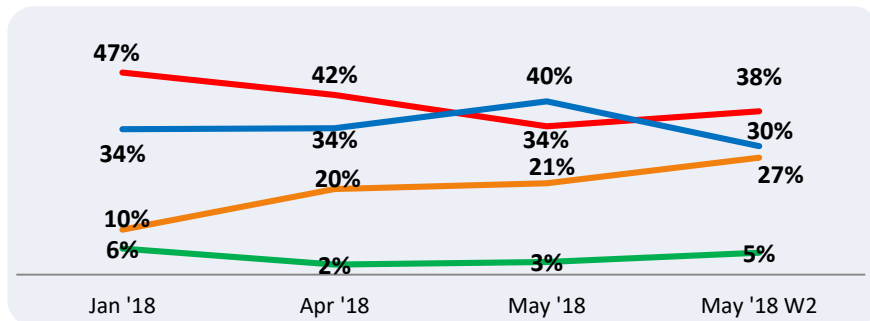


Economic Alienation Segmentation: Alienation and ambivalence down, moderate struggling dreamers up

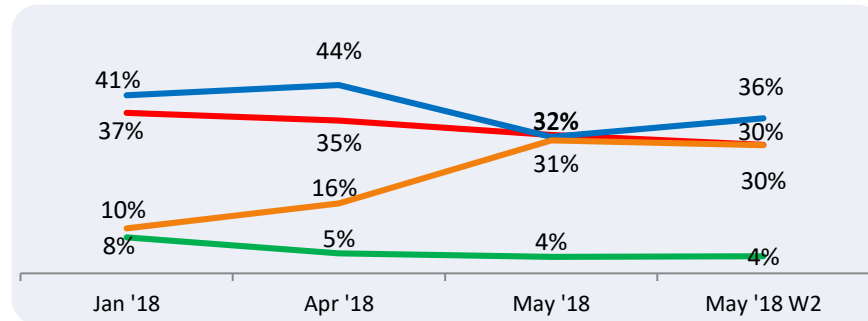


Tracking Decided Vote by Alienation Segmentation

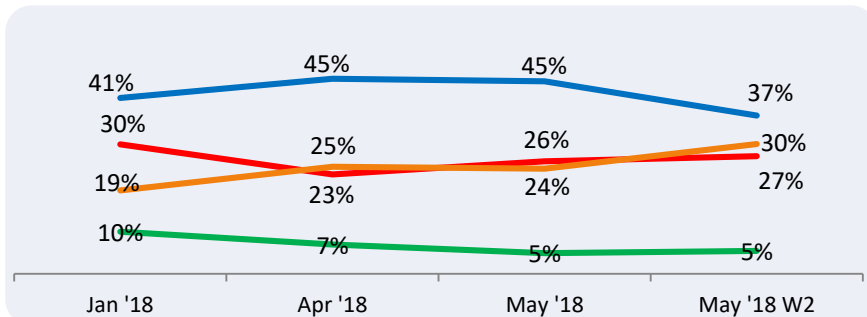
Canadian Dream Achievers



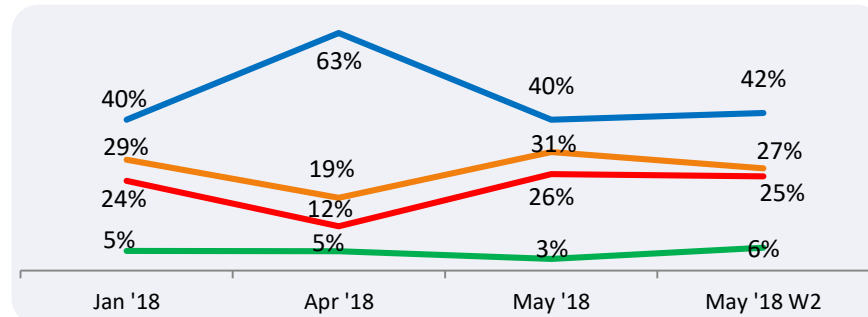
Canadian Dream Hopefuls



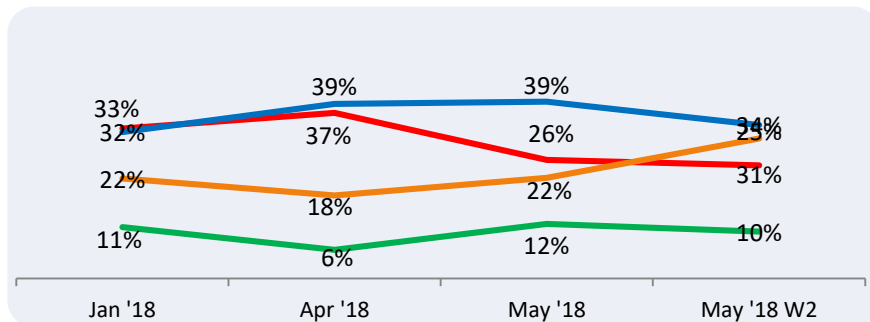
Canadian Dream Moderate Strugglers



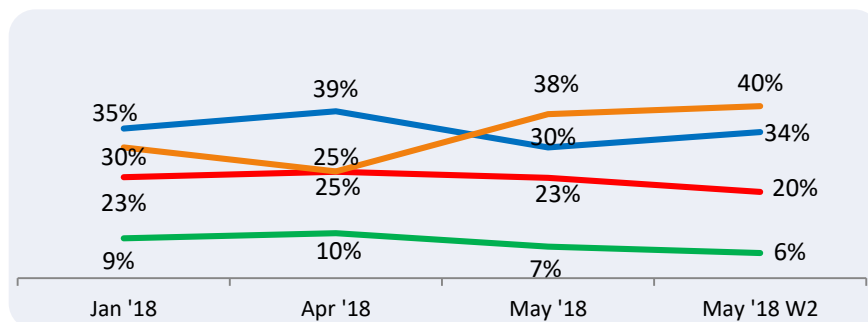
Canadian Dream Heavy Strugglers



Ambivalent



Alienated



Decided vote: Liberal PC NDP Green

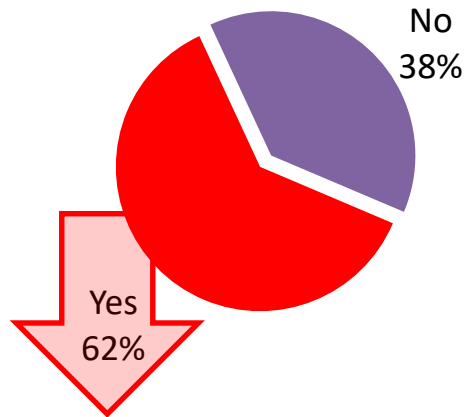
Read, Seen, Heard

Read, seen, heard: Despite gains in polls, less than half have heard about Horwath and NDP campaign recently

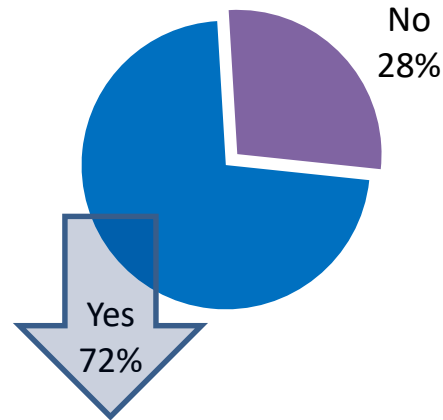
Q

Have you read, seen or heard anything about **[Leader and party]** in the last few days?

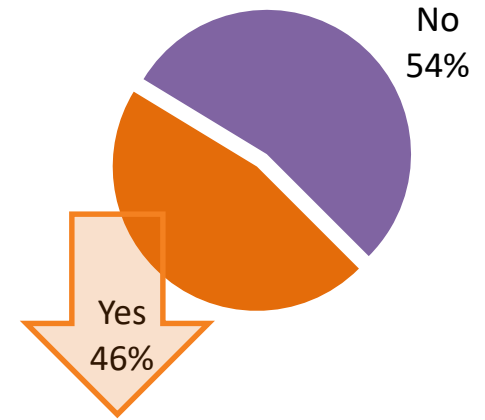
Kathleen Wynne and the Ontario Liberal Party



Doug Ford and the Ontario PCs

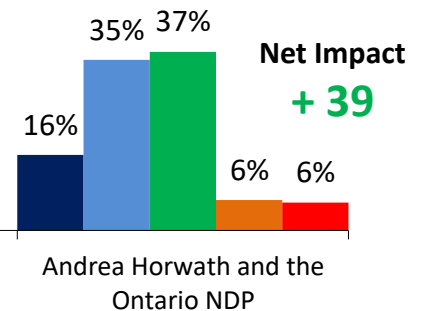
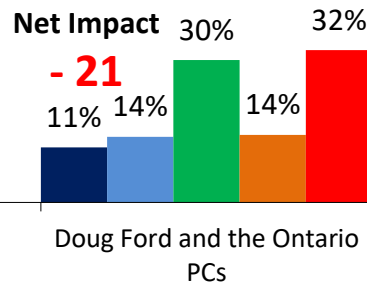
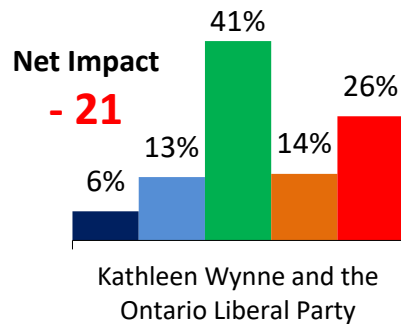


Andrea Horwath and the Ontario NDP



Q

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 **[Leader and party]**, or did it make no difference?



■ A lot more favourable
■ Somewhat less favourable

■ Somewhat more favourable
■ A lot less favourable

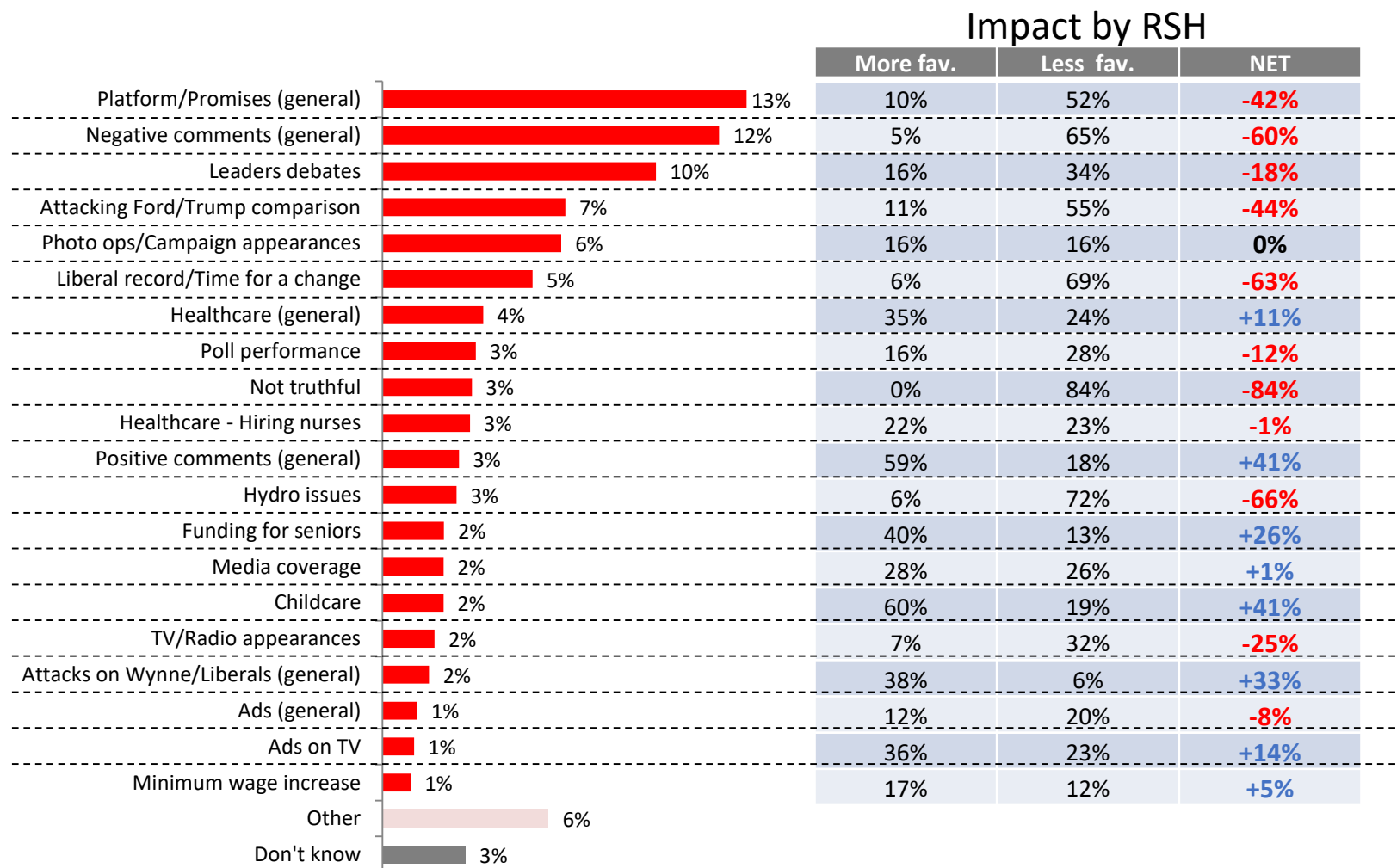
■ Made no difference

RSH about Wynne: General RSH very negative; childcare, health & seniors funding positives but not breaking through

Q

And what did you read, see, or hear about Kathleen Wynne and the Ontario Liberal Party? [OPEN END]

[asked of those who have read, seen or heard about about Kathleen Wynne and the Ontario Liberal Party; n=925]



Note: “Nothing” (1%) and “Refused” (4%) not shown. Impact only shown for responses with unweighted N size of at least 10

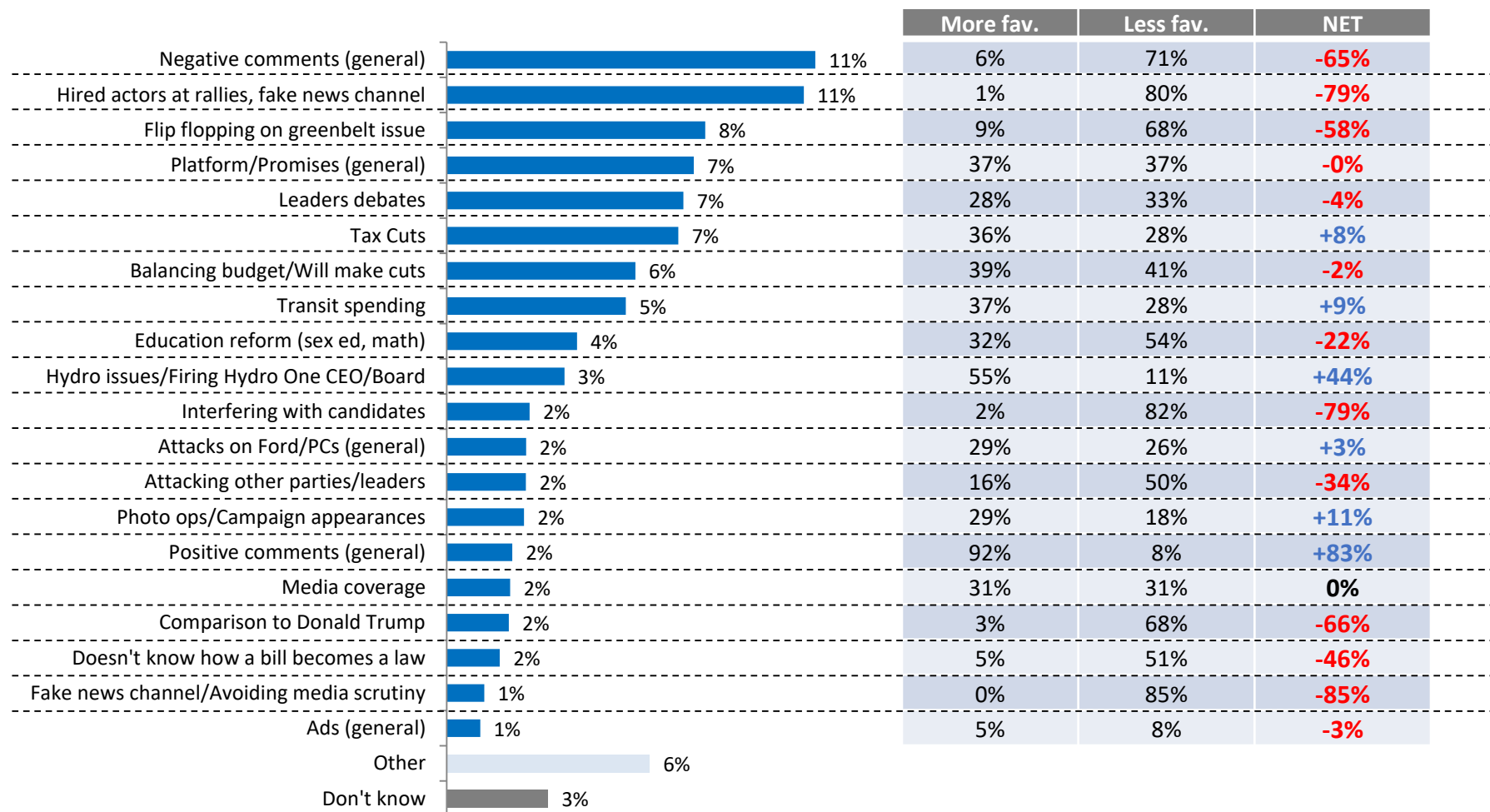
RSH about Ford: Actors at rallies and greenbelt issue hurting Ford's campaign; tax cuts and budget issues polarize voters ³⁷

Q

And what did you read, see, or hear about Doug Ford and the Ontario PCs? [OPEN END]

[asked of those who have read, seen or heard about Doug Ford and the Ontario PCs; n=1085]

Impact by RSH



Note: "Nothing" (1%) and "Refused" (3%) not shown. Impact only shown for responses with unweighted N size of at least 10

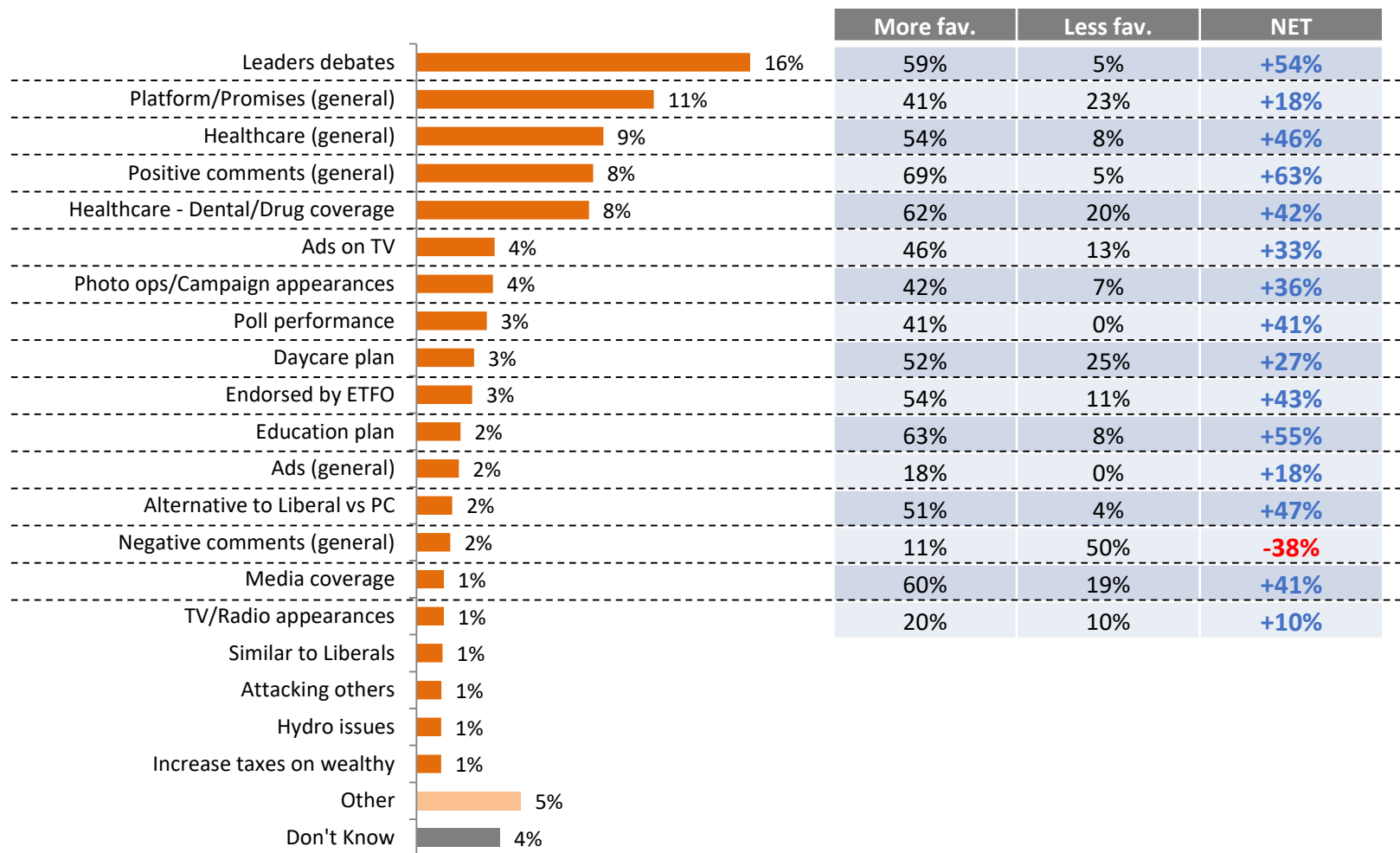
RSH about Horwath: Campaign having positive impact across the board - especially on debate performance; health

Q

And what did you read, see, or hear about Andrea Horwath and the Ontario NDP? [OPEN END]

[asked of those who have read, seen or heard about Andrea Horwath and the Ontario NDP; n=692]

Impact by RSH

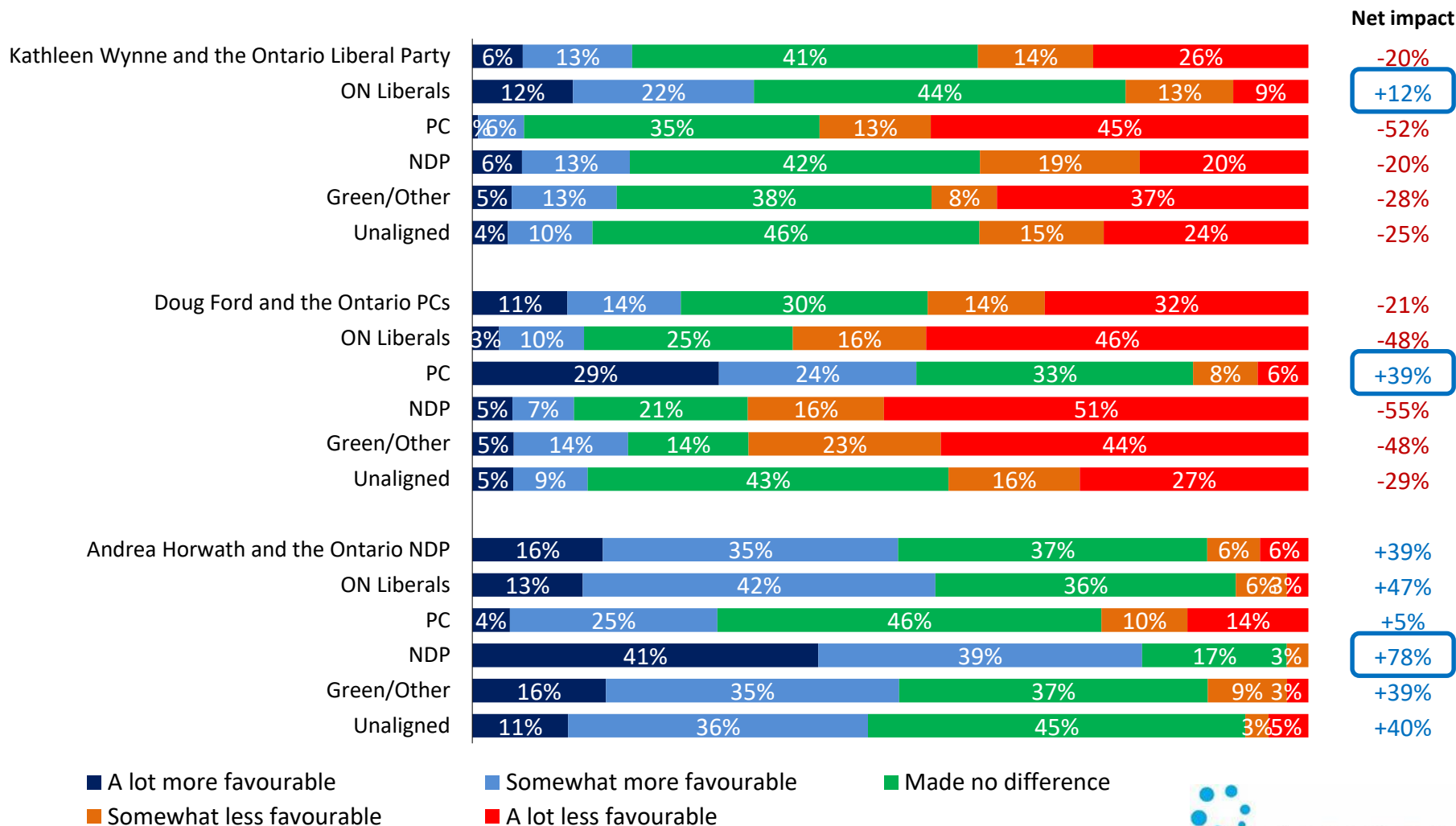


Note: “Nothing” (2%) and “Refused” (5%) not shown. Impact only shown for responses with unweighted N size of at least 10

Campaign impact: Unaligned voters much more favourable to Horwath's campaign than other two options 39

Q

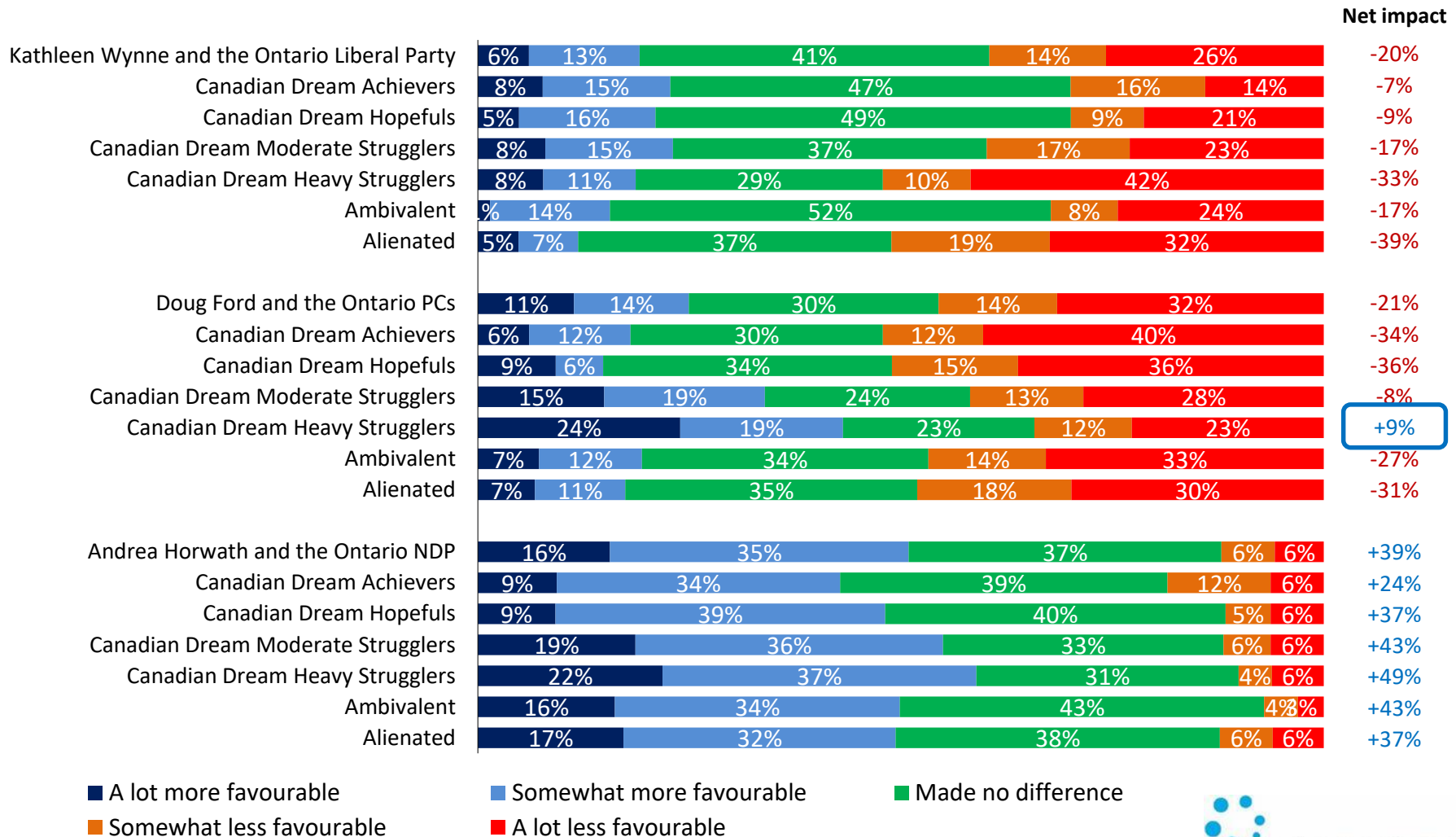
Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards [Leader and party], or did it make no difference? [BY PARTY ID]



Campaign impact: those who believe in Canadian dream but are currently struggling have positive reactions to Ford

Q

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 [Leader and party], or did it make no difference? [BY ALIENATION SEGMENTS]





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