Ontario Politics in the time of COVID-19: July 2020 Update

Public Opinion Research
Release Date: July 29 2020
Field Dates: July 14, 2020 to July 20, 2020

Ontario Politics in the time of COVID-19

The COVID-19 outbreak has set off a series of changes in the Canadian political landscape. In Ontario, Ford's leadership attributes are much stronger than his competitors and have improved markedly since his election. Ford does particularly well when it comes to 'strong leadership' and 'competent' when compared to other party leaders. In fact, more chose Ford as best described by 'strong leadership' and 'competent' than all other leaders combined.

Ford continues to be the clear top choice for the best premier of Ontario.

Despite the Ontario government's stumble in approval and vote share in June, there is a tight race between the PCs and Liberals when it comes to vote.

Today, INNOVATIVE is releasing results from our July 2020 Canada This Month survey. This online survey was in field from July 14th to July 20th with a weighted sample size of 600 Ontario residents. Detailed methodology is provided in the appendix.

This report covers key results on how Ontarians rate their government's handling of the COVID-19 outbreak, Ontario vote choice, and evaluation of party leaders.
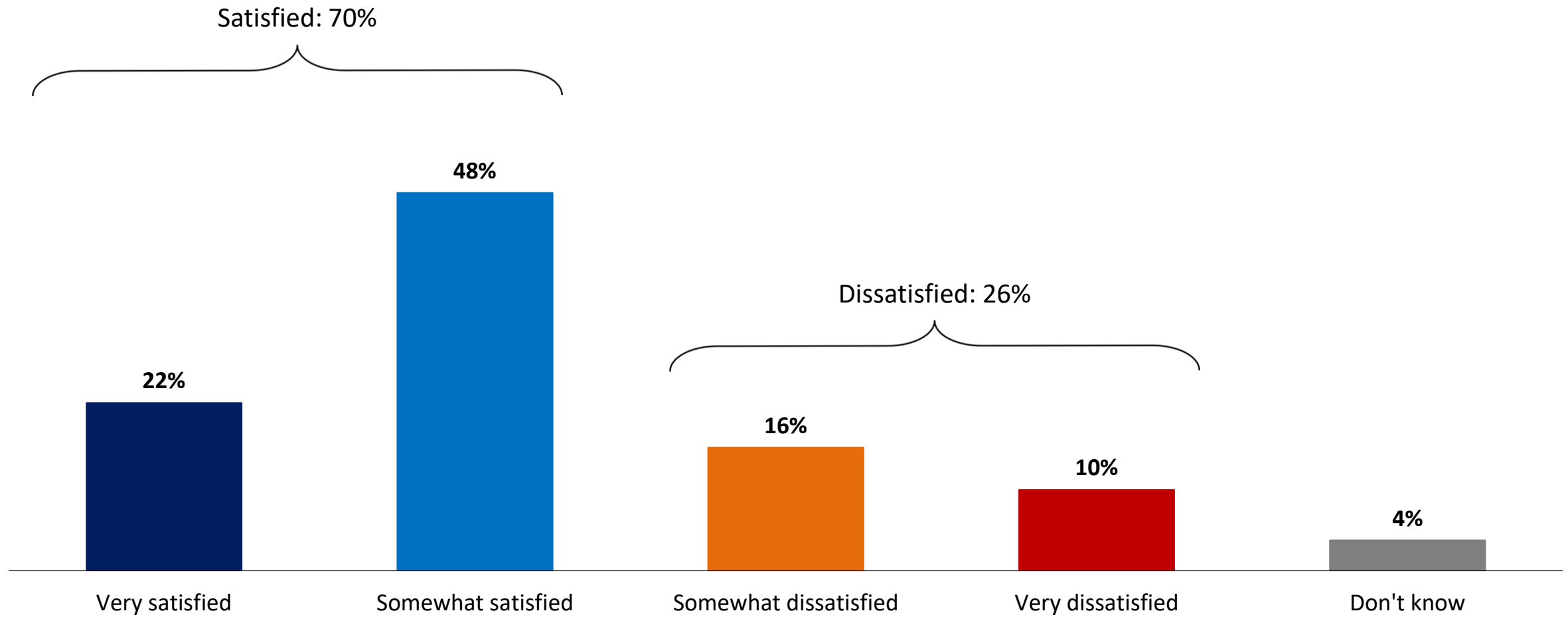
Government Approval

The Ontario government continues to receive top marks on both their performance generally and their handling of the COVID-19 outbreak specifically.

Ontario Mood: 7-in-10 (70%) say they're at least somewhat satisfied with the performance of the Ontario gov't in general

Q Generally speaking, how satisfied are you with the performance of the PROVINCIAL government in Ontario? Would you say you are...?
[asked of all respondents; n=600]

Satisfied: 70%

Dissatisfied: 26%

Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Don't know
22%	48%	16%	10%	4%

Current data: July 2020

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Ontario Mood Tracking: Satisfaction with the Ontario gov't remains high and is up 5-pts directionally since June to 70%

Q Generally speaking, how satisfied are you with the performance of the PROVINCIAL government in Ontario? Would you say you are...?
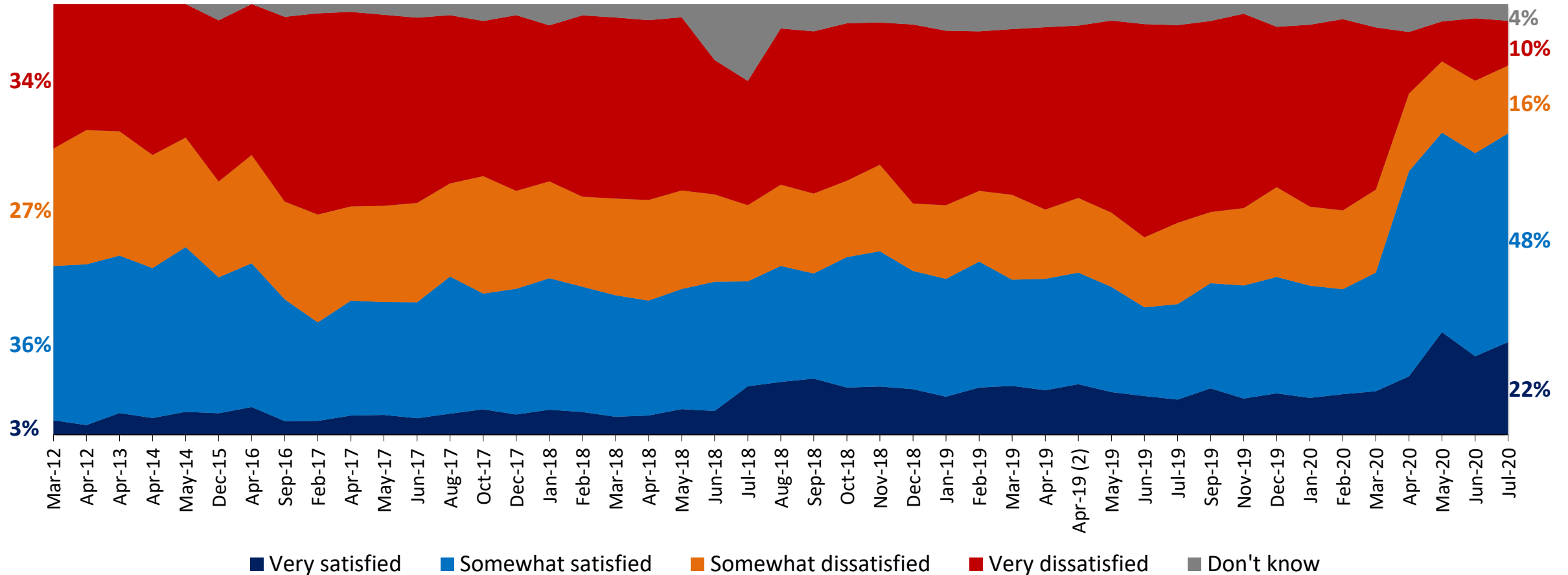[asked of all respondents; n=600]

Legend: ■ Very satisfied ■ Somewhat satisfied ■ Somewhat dissatisfied ■ Very dissatisfied ■ Don't know

Current data: July 2020

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COVID-19 Handling Tracking: Approval of the ON gov'ts handling of COVID is up 6-pts since late June

Q Do you approve or disapprove of the way the Ontario Government has handled the outbreak of COVID-19?
[asked of all respondents; n=600]

Legend:
- Strongly approve
- Somewhat approve
- Neither approve nor disapprove
- Somewhat disapprove
- Strongly disapprove
- Don't know

Current data: July 2020
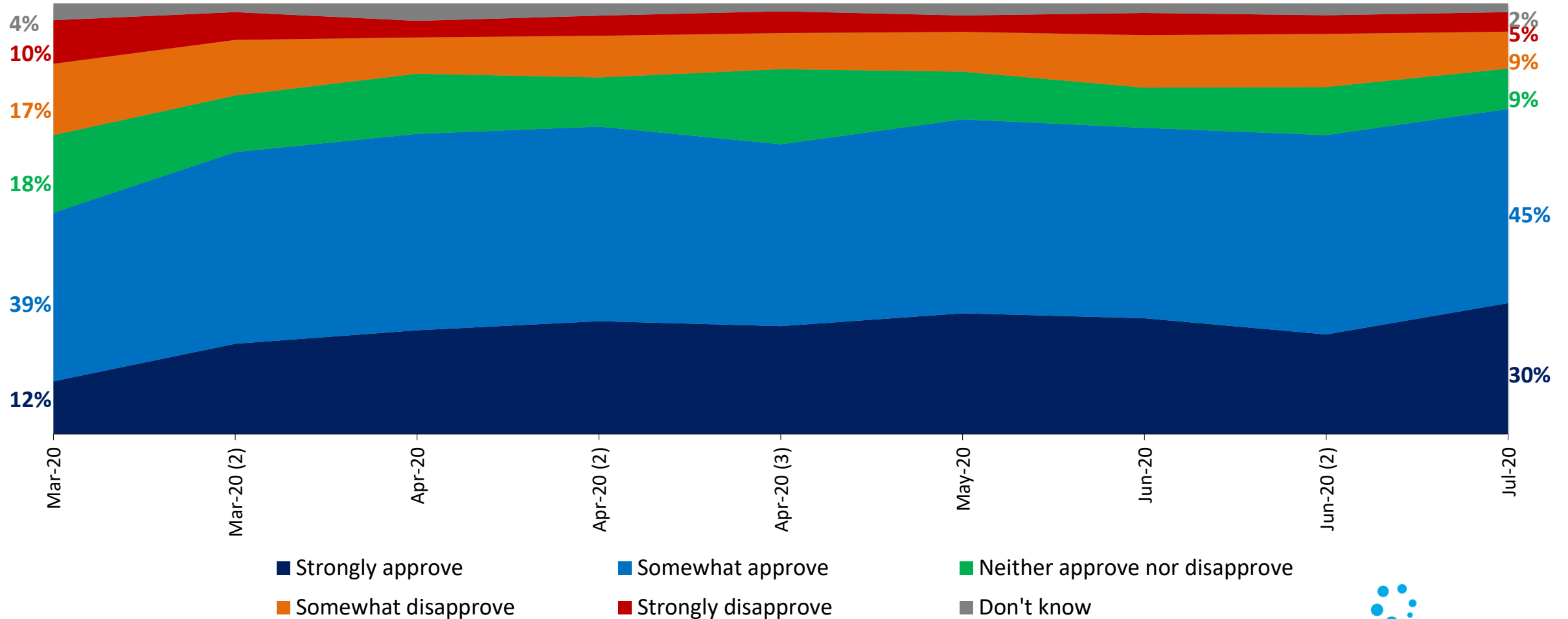
COVID-19 Handling Tracking: Ontario has gone from 12 points below in March to being 4 points above the nat'l average in July

% who approve of *provincial* government's handling of COVID-19 outbreak: Ontario Vs. National Average

[asked of all respondents; Ontario n=600]

National
Average

Ontario

51%   65%   70%   71%   67%   73%   71%   70%   75%

63%   69%   67%   69%   66%   68%   69%   69%   71%

March 16-18   March 24-26   March 31-April 2   April 9-13   April 20-22   May 1-5   May 29-June 1   June 19-23   July 14-20

Current data: July 2020

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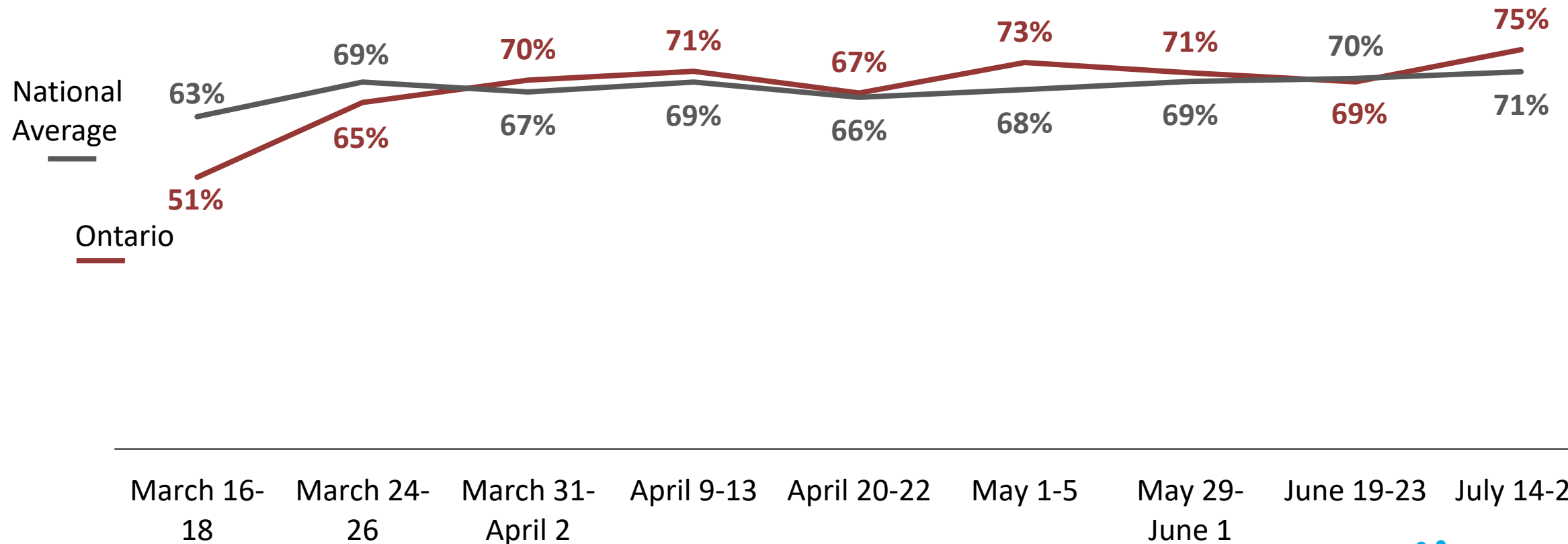
Read, Seen, Heard

Share of those who have read, seen, or heard something about Ford in the last few days remains high and a majority of those who do recall something report a more favourable response towards Ford.

Ontario Read, Seen, Heard: Over 3-in-5 (63%) say they've RSH something about Ford; of those who did, a majority were left more favourable

Q Have you read, seen or heard anything about Doug Ford in the last few days?
[Asked of those who have RSH; n=600]
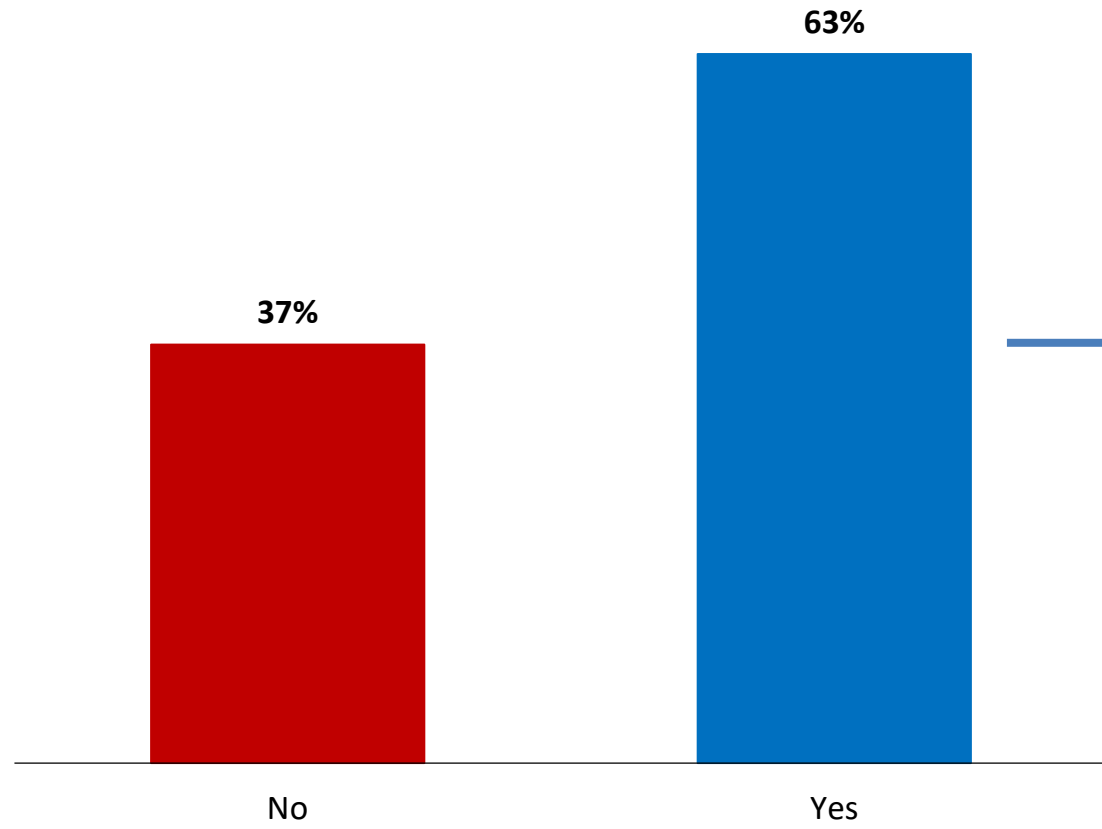
Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Doug Ford, or did it make no difference?
[Asked of those who have RSH; n=377]

37% No

63% Yes

A lot less favourable — 11%
Somewhat less favourable — 8%

Less Favourable: 19%

Made no difference — 31%

Somewhat more favourable — 31%
A lot more favourable — 19%

More Favourable: 50%

Current data: July 2020

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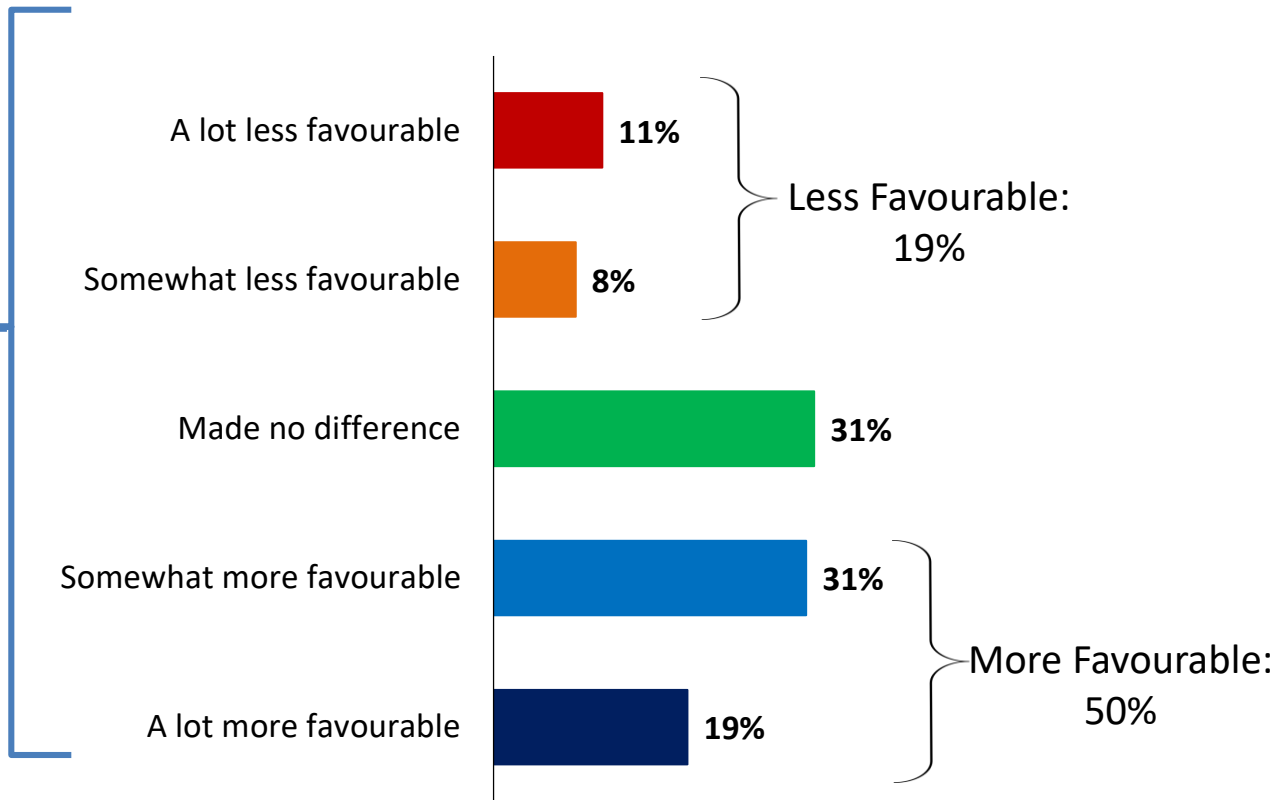
Read, Seen, Heard Tracking: Proportion of those who have read, seen, or heard about Doug Ford in the last few days is steady at 63%

Q Have you read, seen or heard anything about Doug Ford in the last few days?
[asked of all respondents; n=600]
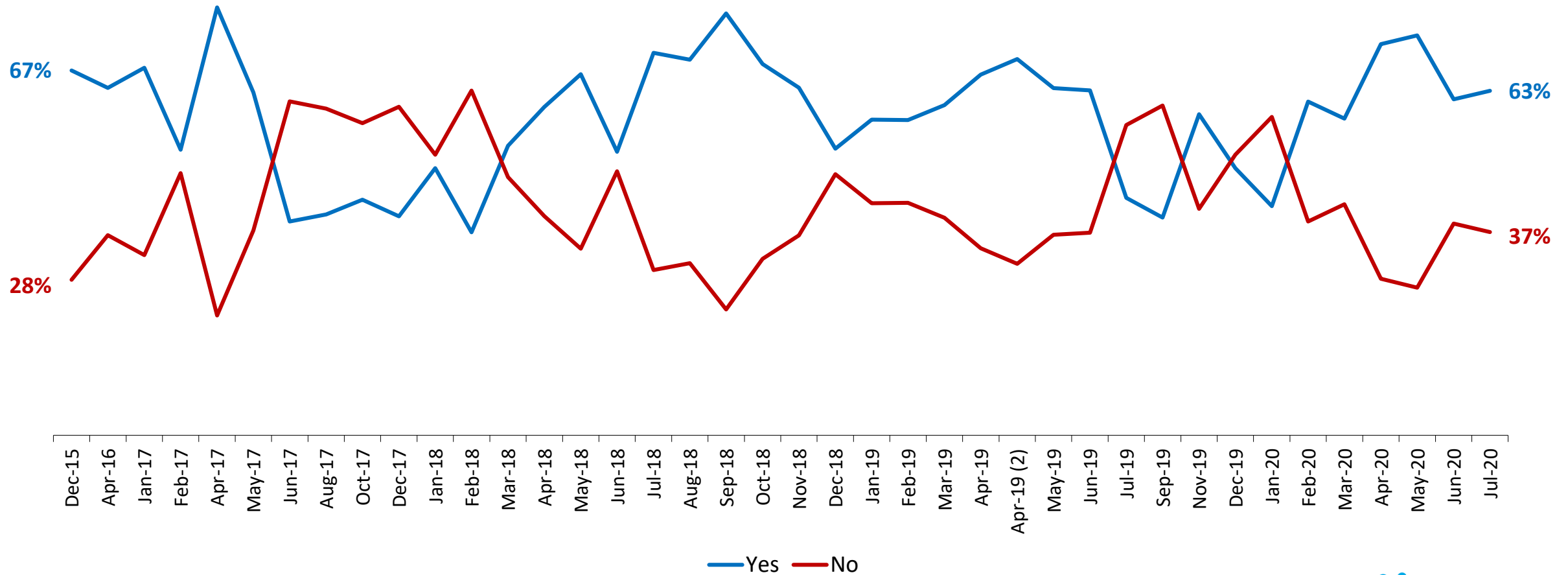
Note: Don't know not shown.
Current data: July 2020

Ontario Read, Seen, Heard, Impact Tracking: Proportion who say they felt more favourable towards Ford is up 7 points since June to 50%

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 Doug Ford, or did it make no difference?

[asked of those who have RSH; n=377]

Legend: ■ A lot more favourable ■ Somewhat more favourable ■ Made no difference ■ Somewhat less favourable ■ A lot less favourable

Note: Don't know not shown.
Current data: July 2020

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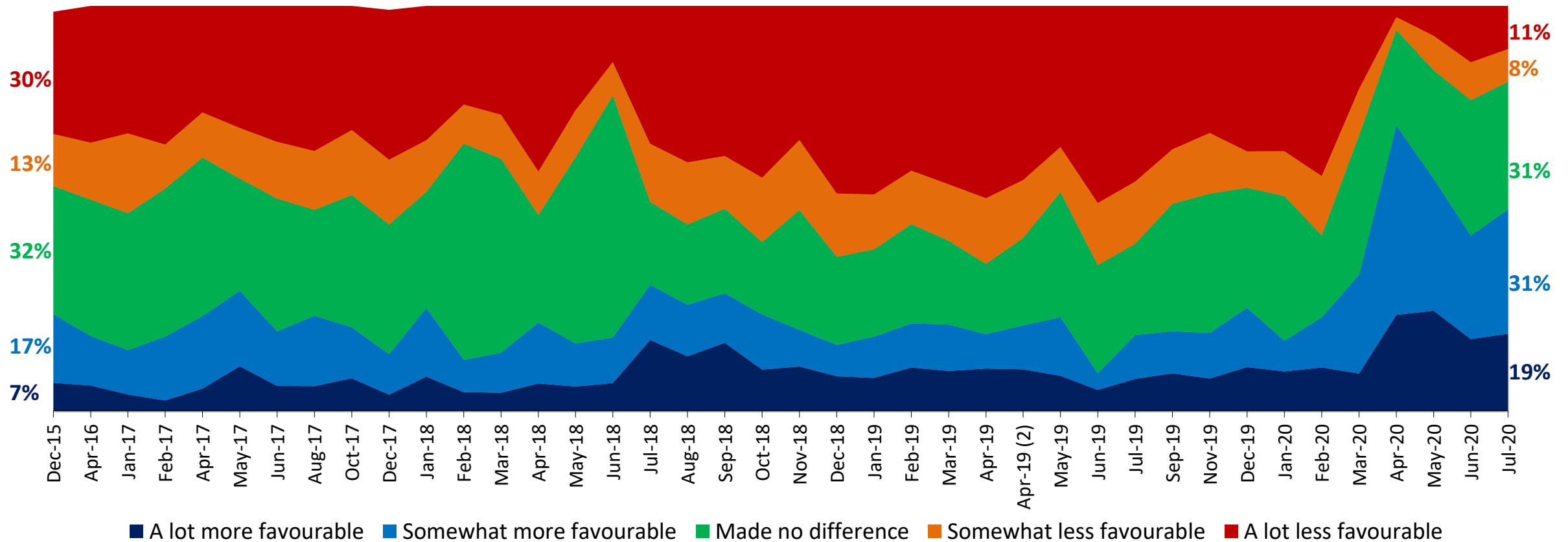
We group individuals into segments based on key political and economic values and attitudes

We use these segments throughout the remainder of the report to analyze vote and leadership results.

Core Political Values: A plurality (47%) believe the ON gov't should listen to experts when it comes to policy

Q Now we would like to ask a few questions about basic values and society...When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?
[asked of all respondents; n=600]

- Their ability to afford the programs and services — 32%
- The public's need for the programs and services — 57%
- Don't know — 11%

Q Is the main role of government to...?
[asked of all respondents; n=600]

- To create equal opportunity so that everyone can compete on their own to be the best they can be — 59%
- To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own — 31%
- Don't know — 10%

Q Which of the following statements comes closest to your view?
[asked of all respondents; n=600]

- The profit system brings out the worst in human nature. — 44%
- The profit system teaches people the value of hard work and success. — 43%
- Don't know — 13%

Q When it comes to government decision making, which of the following statements is closest to your view?
[asked of all respondents; n=600]

- Too often the government listens to experts instead of common sense. — 40%
- Provincial issues are complicated so government should listen to experts when it comes to policy. — 47%
- Don't Know — 13%

Current data: July 2020

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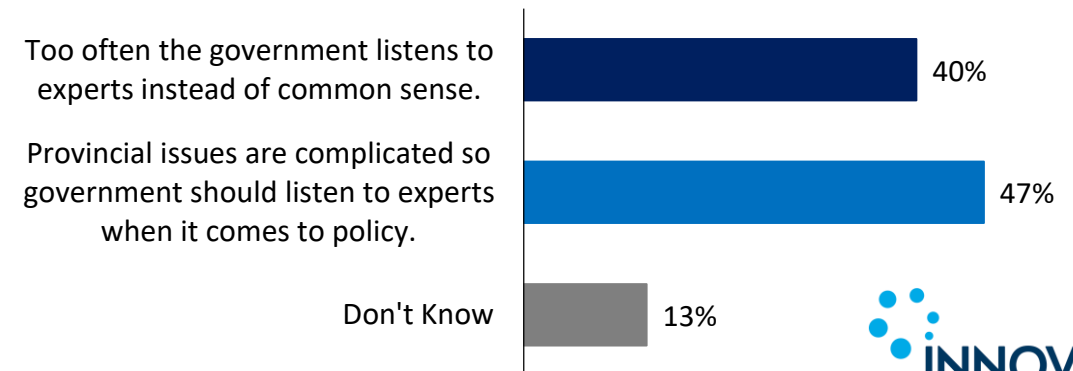
Value Clusters: The largest segment of Ontarians are Business Liberals (25%), followed by Core Left (20%) and Thrifty Moderates (19%)

Clusters 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.

[asked of all respondents; n=600]

Current data: July 2020
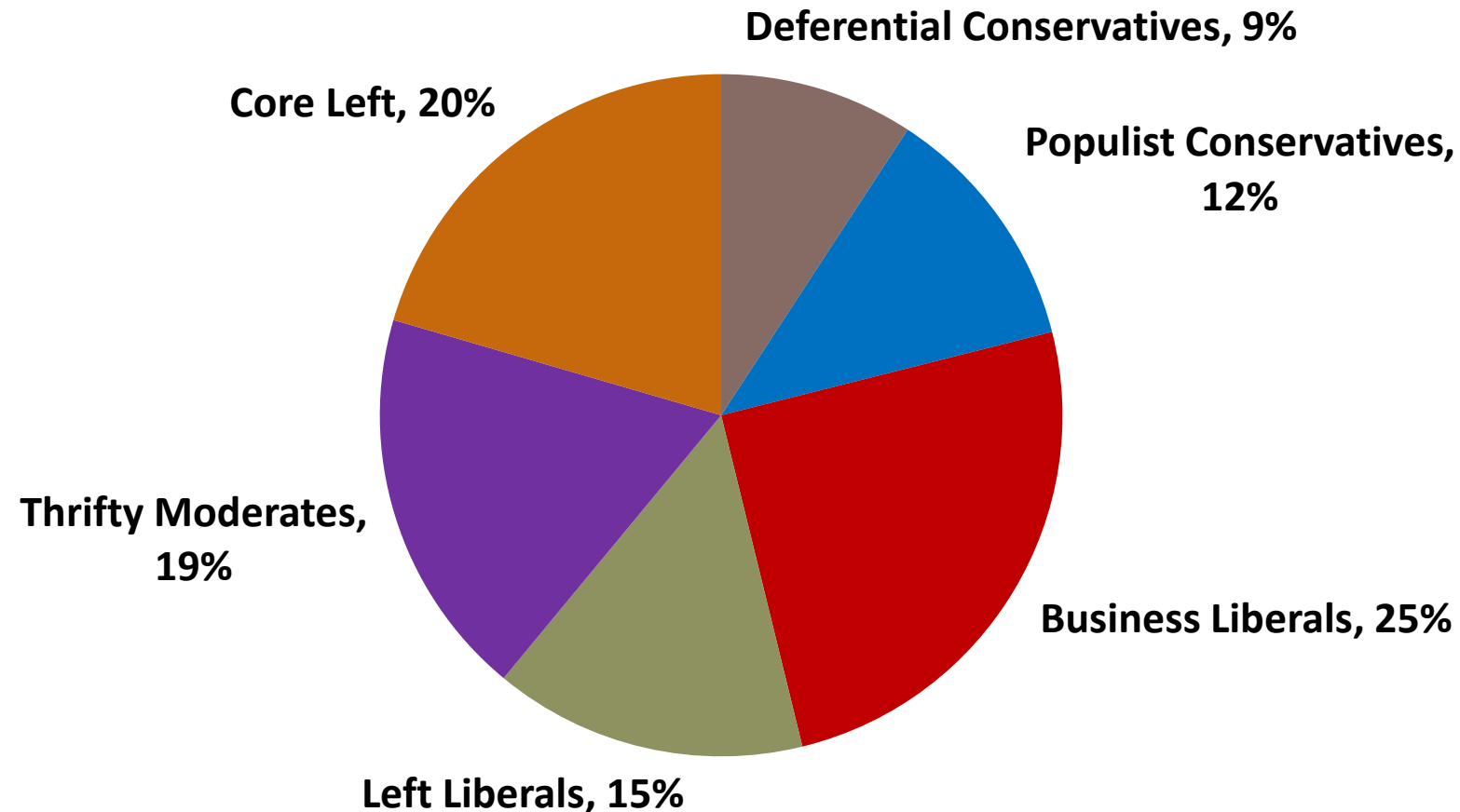
Defining Value Clusters: Nearly all Deferential and Populist Conservatives say gov't should base decisions on their ability to afford

Core Political Values by Value Clusters

Column %		Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Governments should base decisions on...	Ability to afford	88%	95%	0%	0%	68%	0%
	Public Need	0%	0%	94%	92%	0%	95%
Is the main role of government to .?	Create equal Opportunity	83%	100%	71%	99%	37%	0%
	Redistribute wealth	15%	0%	18%	0%	29%	95%
When it comes to government decision making...	Rely on common sense	0%	100%	34%	42%	40%	31%
	Listen to experts	94%	0%	56%	46%	27%	62%
The profit system...	Brings out the worst in human nature	0%	0%	0%	86%	64%	92%
	Teaches value of hard work and success	95%	98%	89%	0%	5%	0%

Note: Current data: July 2020

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Segmentation Attitudes: Most Ontarians believe that in their province, you can be anything you want if you are willing to work for it

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=600]

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Here in Ontario you can be anything you want if you are willing to work for it	20%	36%	17%	16%	9%	2%
No matter how hard I work, every year it seems more difficult to get by	17%	28%	23%	16%	14%	2%

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

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Current data: July 2020
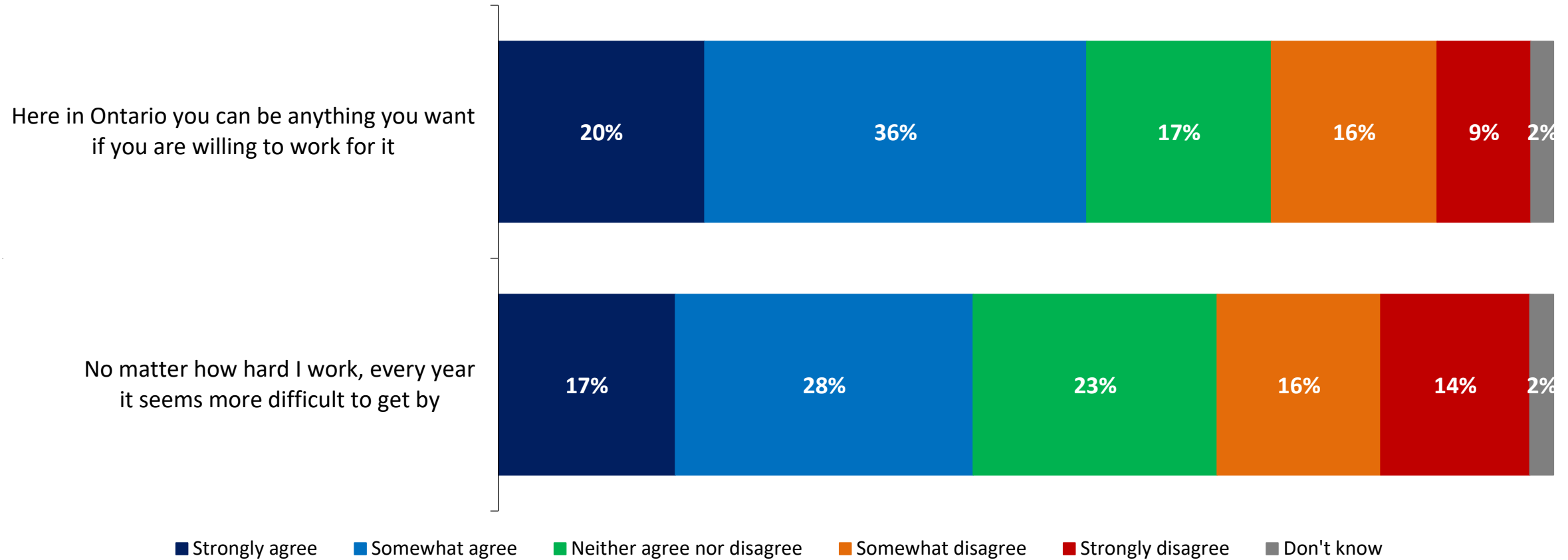
Economic Gap Segmentation: Most are either Dream Achievers (33%) or Alienated (25%)

Gap segmentation: Agree with 'Here in Ontario you can be anything you want if you are willing to work for it' BY Agree with 'No matter how hard I work, every year it seems more difficult to get by'.

[asked of all respondents; n=600]

Don't believe in *"Canadian Dream"*

Alienated, 25%

Believe in *"Canadian Dream"*, not struggling to get by

Achievers, 33%

Ambivalent, 20%

Strugglers, 23%

Neutral or don't know on *"Canadian Dream"*

Believe in *"Canadian Dream"*, but find it difficult to get by

Current data: July 2020

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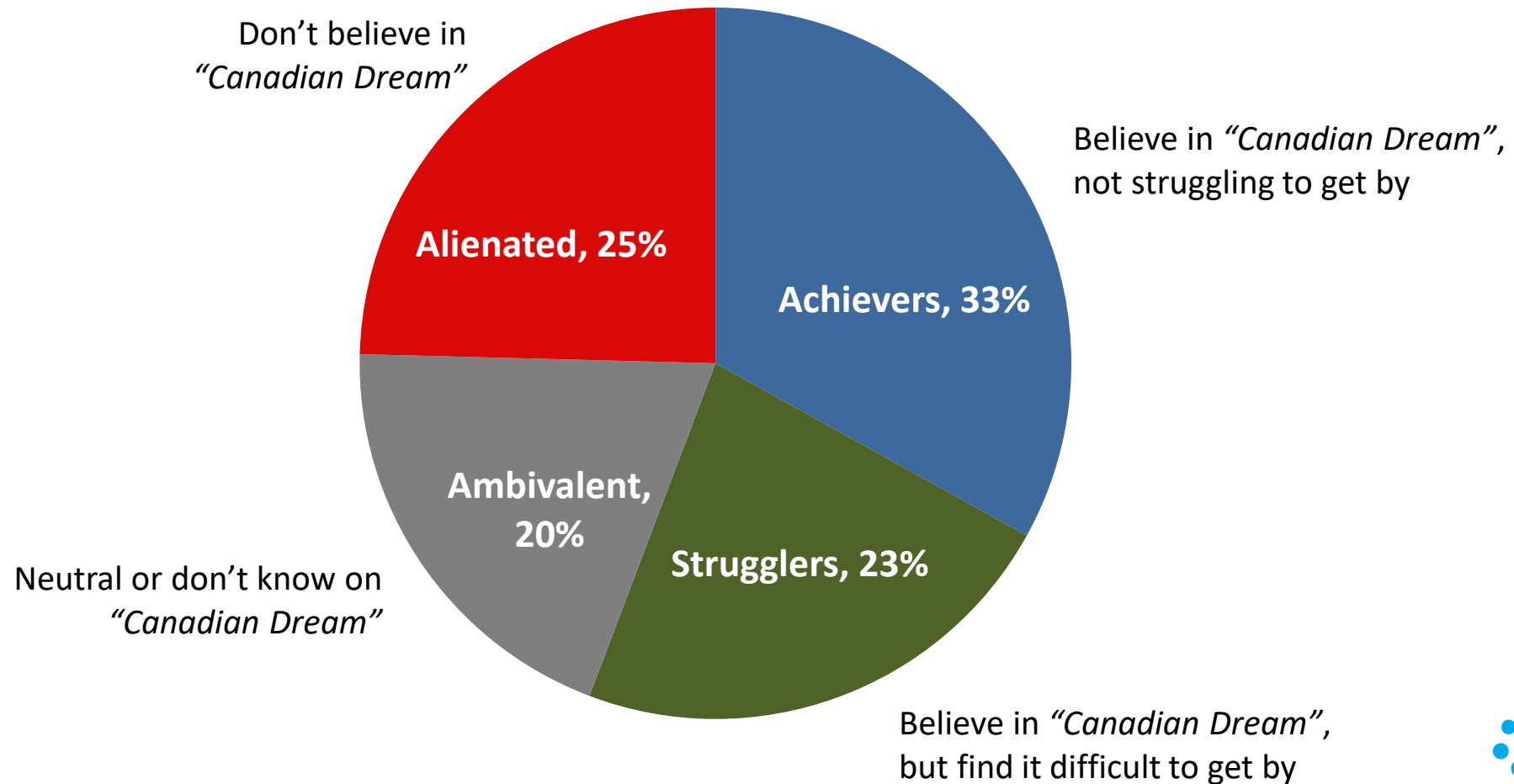
Time for Change Attitudes: 4-in-10 (40%) believe it is time for a change in government in Ontario

Q Do you agree or disagree with the following statements?
[asked of all respondents; n=600]

Statement	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
It is time for a change in government here in Ontario	22%	18%	22%	12%	22%	4%
The Progressive Conservatives may have their problems but they are still the best party to form government	20%	20%	19%	13%	22%	5%

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

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Current data: July 2020
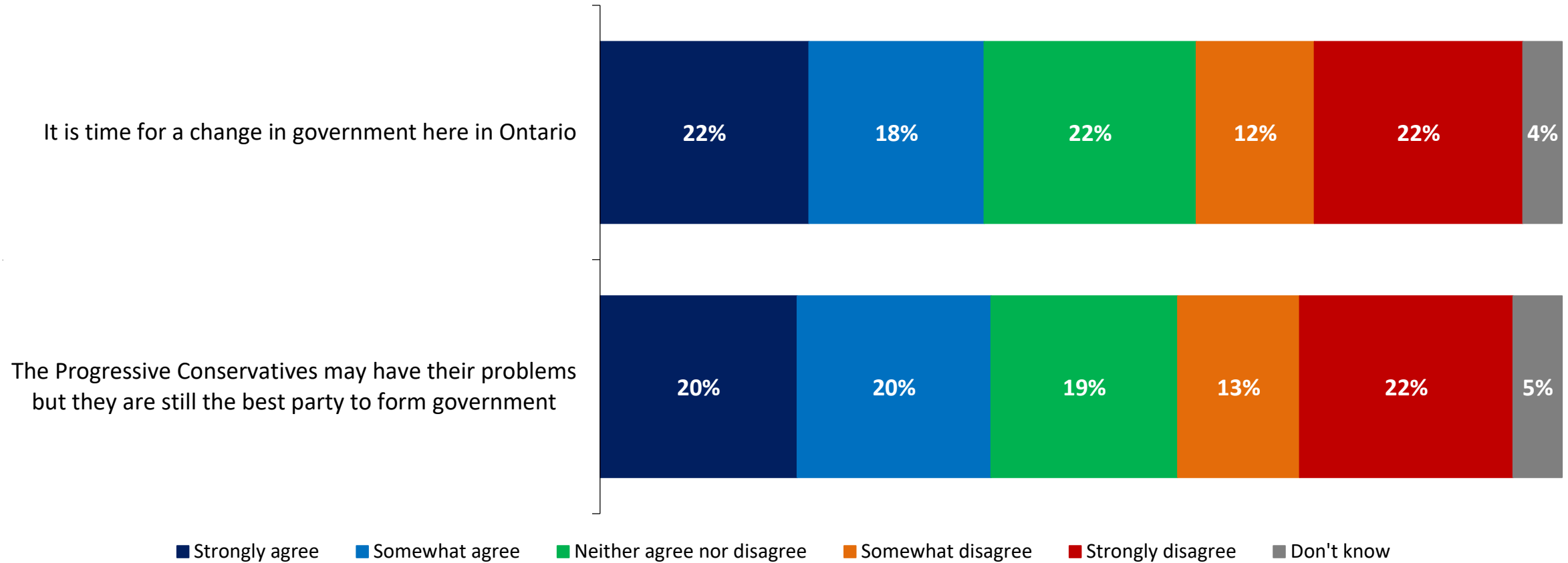
Time for Change Segmentation: 2-in-5 (41%) agree it's time for a change of gov't and don't see the PCs as the best option

Time for Change segmentation: Agree with 'The PCs may have their problems but they are still the best party to form government' BY Agree with 'It is time for a change in government here in Ontario'.

[asked of all respondents; n=600]

41% Agree that it is time for a change and do not see PCs as the best option to form government

36% Do not think it is time for a change

This key battleground segment is voters who think it is time for a change, but still think the PCs are the best option to form a government

14%
27%
26%
9%
15%
8%

■ Core PC ■ Soft PC ■ Time for change ■ Uncertain ■ Soft anti-PC ■ Hostile

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Current data: July 2020

Leadership

Ford holds a wide lead on attributes such as 'strong leadership', 'competence', and 'represents positive change', and that lead has grown since the election. He's also seen more favourably than any other candidate and maintains his lead on Best PM.

Leader Favourables: Doug Ford has the highest favourability among all party leaders with half (51%) of respondents seeing him favourably

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, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=600]

Net Favourable

	Very favourable	Somewhat favourable	Neutral/Neither	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't Know	Net Favourable
Doug Ford	21%	29%	16%	14%	15%	1%	4%	+22%
Mike Schreiner	7%	14%	28%	7%	9%	22%	13%	+6%
Andrea Horwath	11%	22%	25%	15%	18%	2%	7%	0%
Steven Del Duca	6%	14%	28%	11%	11%	18%	14%	-2%

- Very favourable
- Somewhat favourable
- Neutral/Neither favourable nor unfavourable
- Somewhat unfavourable
- Very unfavourable
- Do not recognize
- Don't Know

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Current data: July 2020
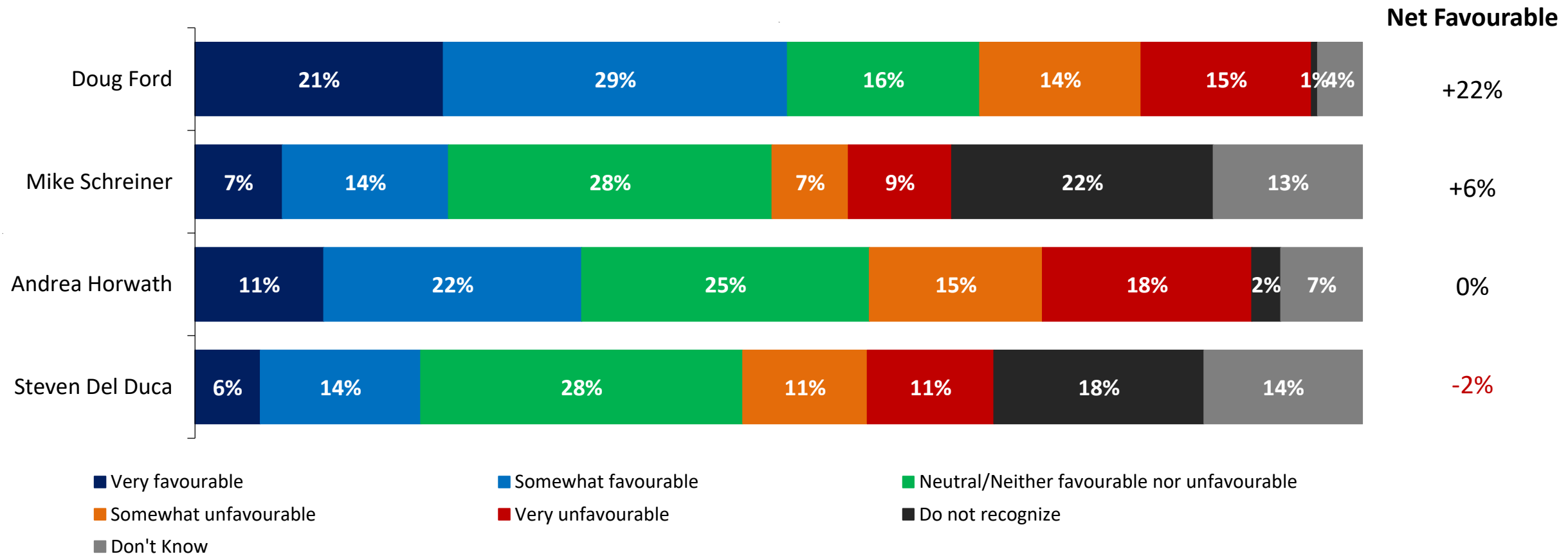
Doug Ford Favourability: Ford's strong favourability numbers are steady since June

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, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=600]

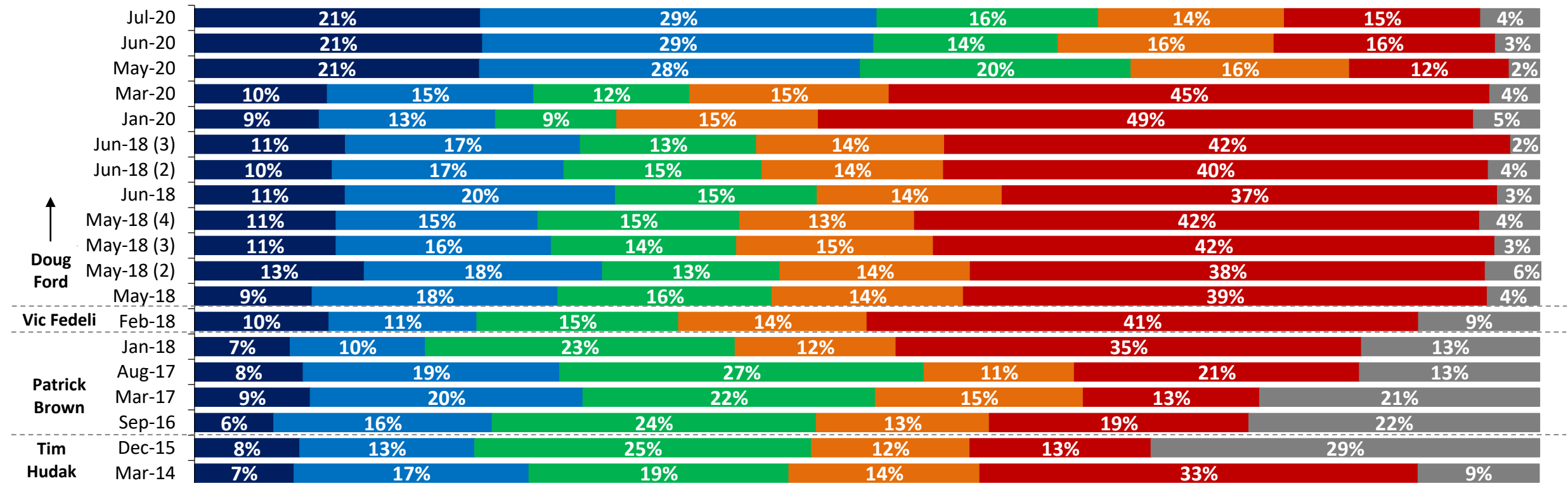|		Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Don't know + don't recognize
Doug Ford	Jul-20	21%	29%	16%	14%	15%	4%
	Jun-20	21%	29%	14%	16%	16%	3%
	May-20	21%	28%	20%	16%	12%	2%
	Mar-20	10%	15%	12%	15%	45%	4%
	Jan-20	9%	13%	9%	15%	49%	5%
	Jun-18 (3)	11%	17%	13%	14%	42%	2%
	Jun-18 (2)	10%	17%	15%	14%	40%	4%
	Jun-18	11%	20%	15%	14%	37%	3%
	May-18 (4)	11%	15%	15%	13%	42%	4%
	May-18 (3)	11%	16%	14%	15%	42%	3%
	May-18 (2)	13%	18%	13%	14%	38%	6%
	May-18	9%	18%	16%	14%	39%	4%
Vic Fedeli	Feb-18	10%	11%	15%	14%	41%	9%
Patrick Brown	Jan-18	7%	10%	23%	12%	35%	13%
	Aug-17	8%	19%	27%	11%	21%	13%
	Mar-17	9%	20%	22%	15%	13%	21%
	Sep-16	6%	16%	24%	13%	19%	22%
Tim Hudak	Dec-15	8%	13%	25%	12%	13%	29%
	Mar-14	7%	17%	19%	14%	33%	9%

■ Very favourable ■ Somewhat favourable ■ Neither favourable nor unfavourable ■ Somewhat unfavourable ■ Very unfavourable ■ Don't know + don't recognize

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Current data: July 2020

Mike Schreiner Favourability: A plurality (35%) say they don't know or recognize Schreiner

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, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=600]

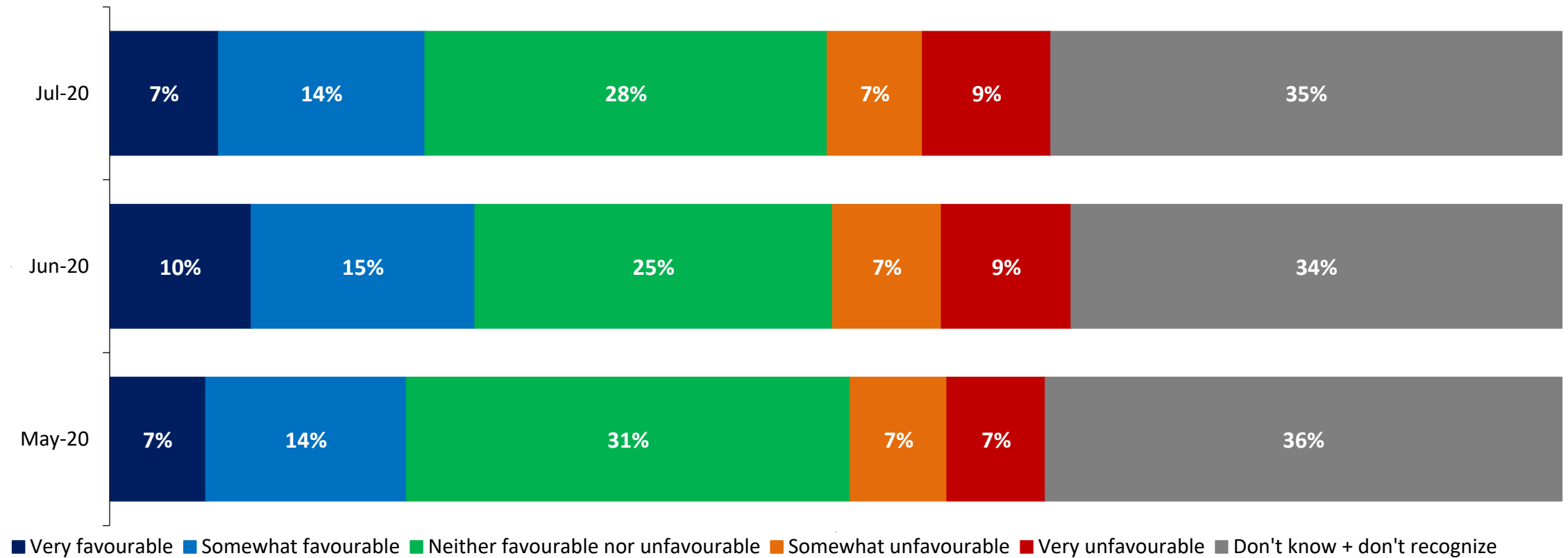|	Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Don't know + don't recognize
Jul-20	7%	14%	28%	7%	9%	35%
Jun-20	10%	15%	25%	7%	9%	34%
May-20	7%	14%	31%	7%	7%	36%

■ Very favourable   ■ Somewhat favourable   ■ Neither favourable nor unfavourable   ■ Somewhat unfavourable   ■ Very unfavourable   ■ Don't know + don't recognize

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Current data: July 2020

Andrea Horwath Favourability: Those saying they have a favourable impression of Horwath is down 5 points directionally since June

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, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.
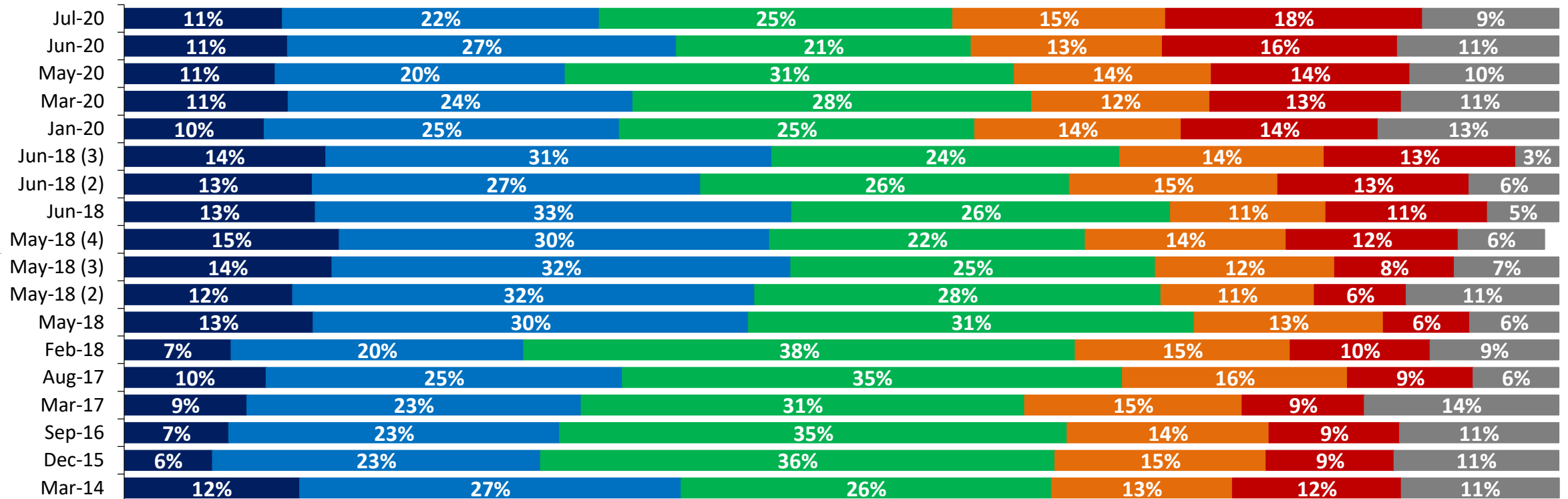
[asked of all respondents; n=600]

	Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Don't know + don't recognize
Jul-20	11%	22%	25%	15%	18%	9%
Jun-20	11%	27%	21%	13%	16%	11%
May-20	11%	20%	31%	14%	14%	10%
Mar-20	11%	24%	28%	12%	13%	11%
Jan-20	10%	25%	25%	14%	14%	13%
Jun-18 (3)	14%	31%	24%	14%	13%	3%
Jun-18 (2)	13%	27%	26%	15%	13%	6%
Jun-18	13%	33%	26%	11%	11%	5%
May-18 (4)	15%	30%	22%	14%	12%	6%
May-18 (3)	14%	32%	25%	12%	8%	7%
May-18 (2)	12%	32%	28%	11%	6%	11%
May-18	13%	30%	31%	13%	6%	6%
Feb-18	7%	20%	38%	15%	10%	9%
Aug-17	10%	25%	35%	16%	9%	6%
Mar-17	9%	23%	31%	15%	9%	14%
Sep-16	7%	23%	35%	14%	9%	11%
Dec-15	6%	23%	36%	15%	9%	11%
Mar-14	12%	27%	26%	13%	12%	11%

Current data: July 2020

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Steven Del Duca Favourability: Those saying they have a favourable impression of Del Duca is steady since June

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, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.
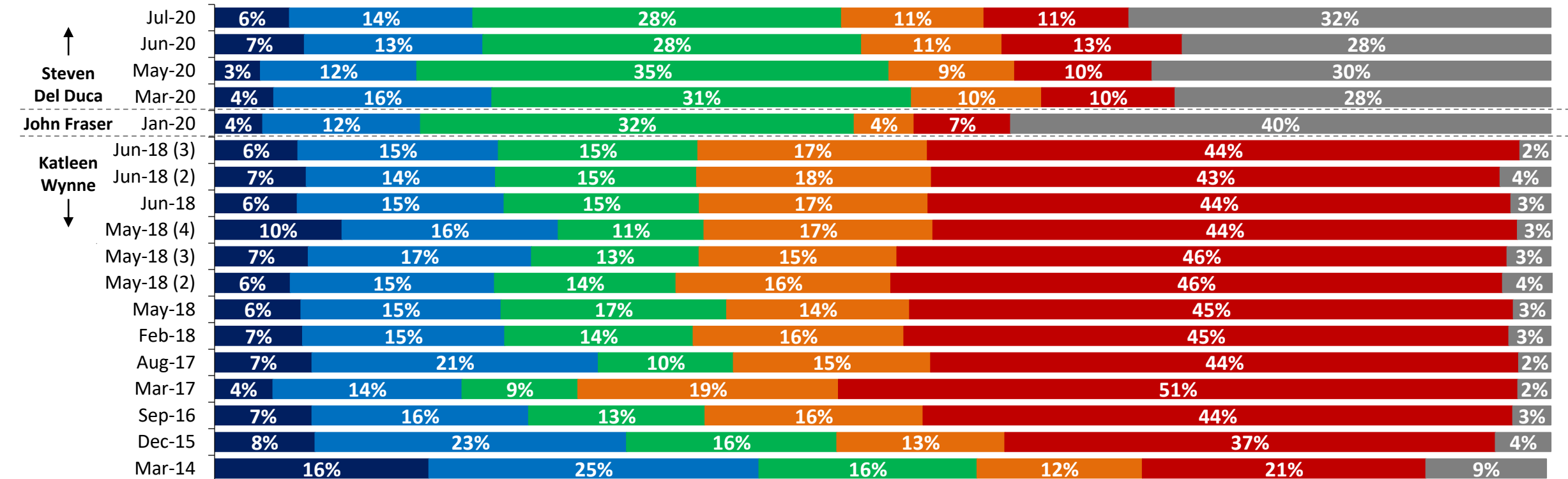
[asked of all respondents; n=600]

	Very favourable	Somewhat favourable	Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Don't know + don't recognize
Jul-20	6%	14%	28%	11%	11%	32%
Jun-20	7%	13%	28%	11%	13%	28%
May-20	3%	12%	35%	9%	10%	30%
Mar-20	4%	16%	31%	10%	10%	28%
Jan-20	4%	12%	32%	4%	7%	40%
Jun-18 (3)	6%	15%	15%	17%	44%	2%
Jun-18 (2)	7%	14%	15%	18%	43%	4%
Jun-18	6%	15%	15%	17%	44%	3%
May-18 (4)	10%	16%	11%	17%	44%	3%
May-18 (3)	7%	17%	13%	15%	46%	3%
May-18 (2)	6%	15%	14%	16%	46%	4%
May-18	6%	15%	17%	14%	45%	3%
Feb-18	7%	15%	14%	16%	45%	3%
Aug-17	7%	21%	10%	15%	44%	2%
Mar-17	4%	14%	9%	19%	51%	2%
Sep-16	7%	16%	13%	16%	44%	3%
Dec-15	8%	23%	16%	13%	37%	4%
Mar-14	16%	25%	16%	12%	21%	9%

Steven Del Duca (Jul-20 to Mar-20)
John Fraser (Jan-20)
**Katleen Wynne** (Jun-18 (3) to Mar-14)

■ Very favourable ■ Somewhat favourable ■ Neither favourable nor unfavourable ■ Somewhat unfavourable ■ Very unfavourable ■ Don't know + don't recognize

Current data: July 2020

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Ontario Party Leader NET Favourables Tracking: Ford's net favourability is up directionally since June while Horwath's is down
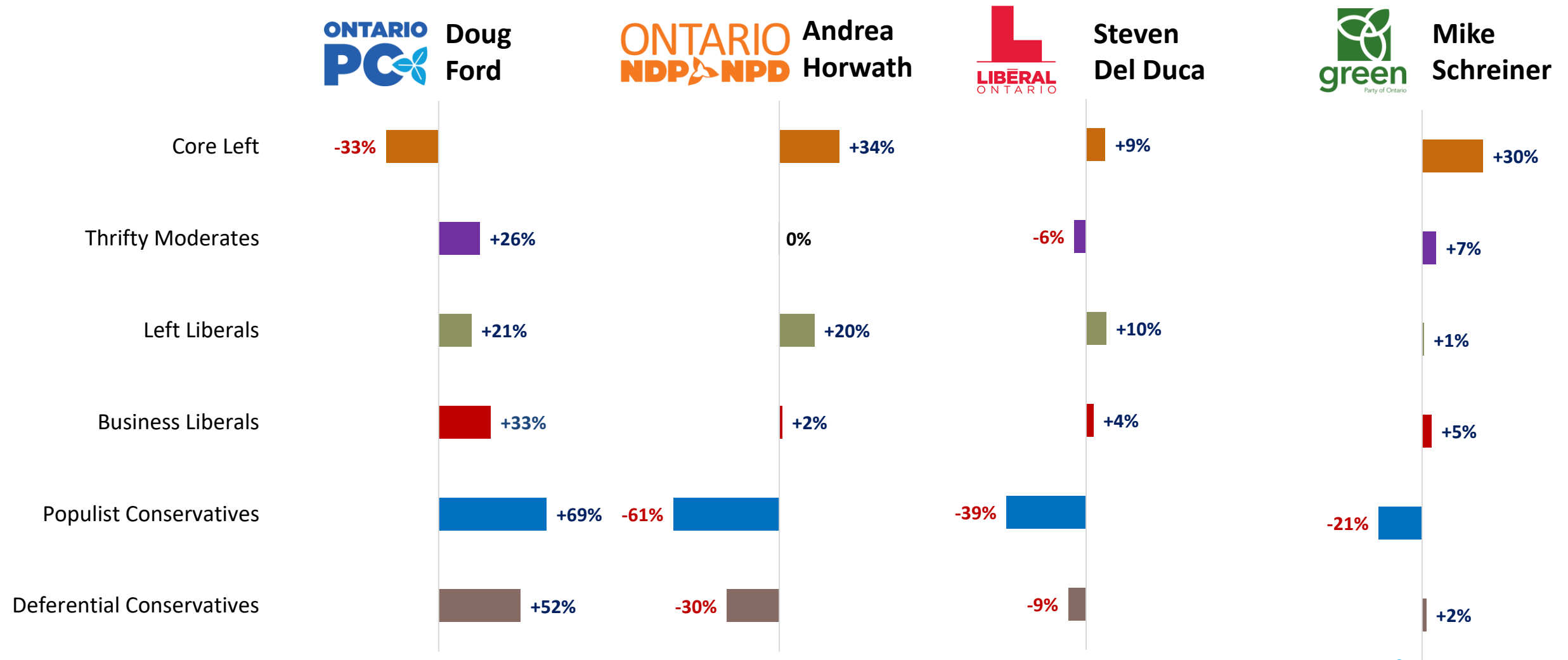
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[asked of all respondents; n=600]

Current data: July 2020; Favourability of Schreiner (Green leader) first asked in May 2020
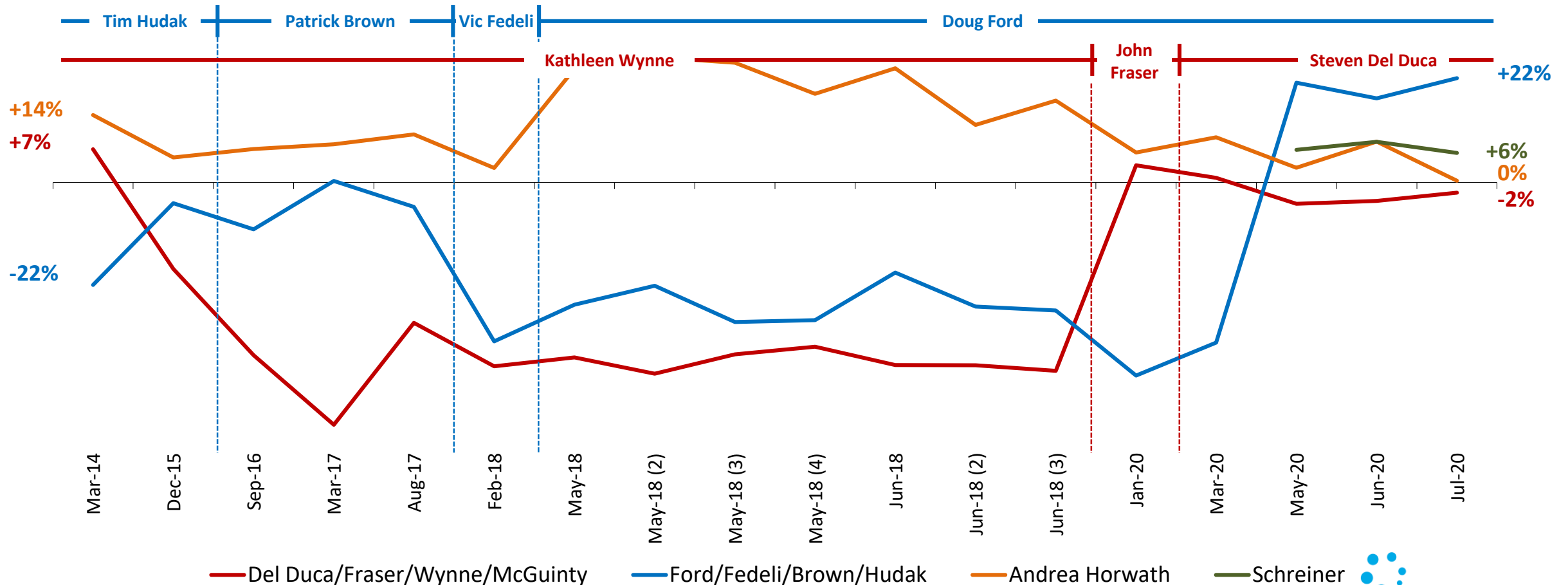
Leader favourability by Value Clusters: Ford is seen more favourably than unfavourably by all groups except for 'Core Left'

	Doug Ford	Andrea Horwath	Steven Del Duca	Mike Schreiner
Core Left	-33%	+34%	+9%	+30%
Thrifty Moderates	+26%	0%	-6%	+7%
Left Liberals	+21%	+20%	+10%	+1%
Business Liberals	+33%	+2%	+4%	+5%
Populist Conservatives	+69%	-61%	-39%	-21%
Deferential Conservatives	+52%	-30%	-9%	+2%

NET Favourability by Value Clusters:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 6 value cluster segments.
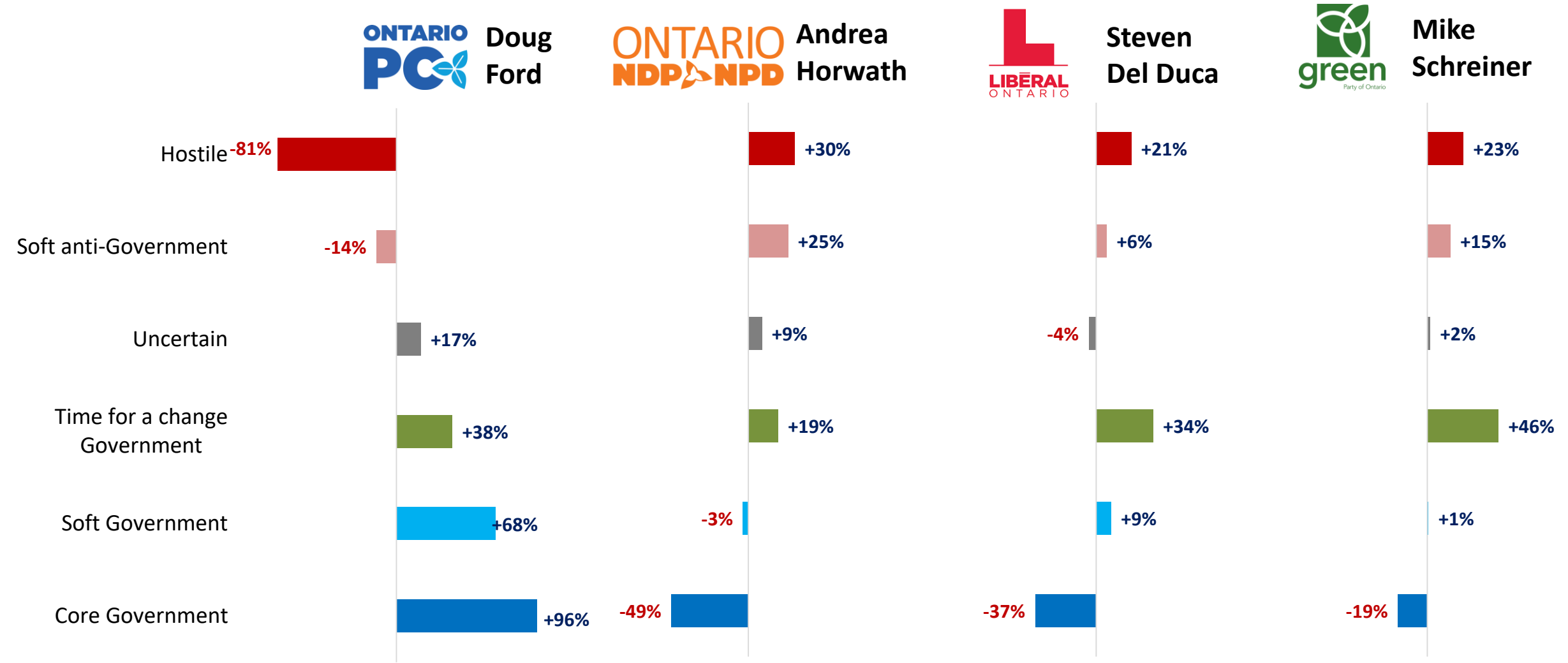
Leader favourability by Economic Gap: Ford receives positive net scores[29] among all groups except for Alienated
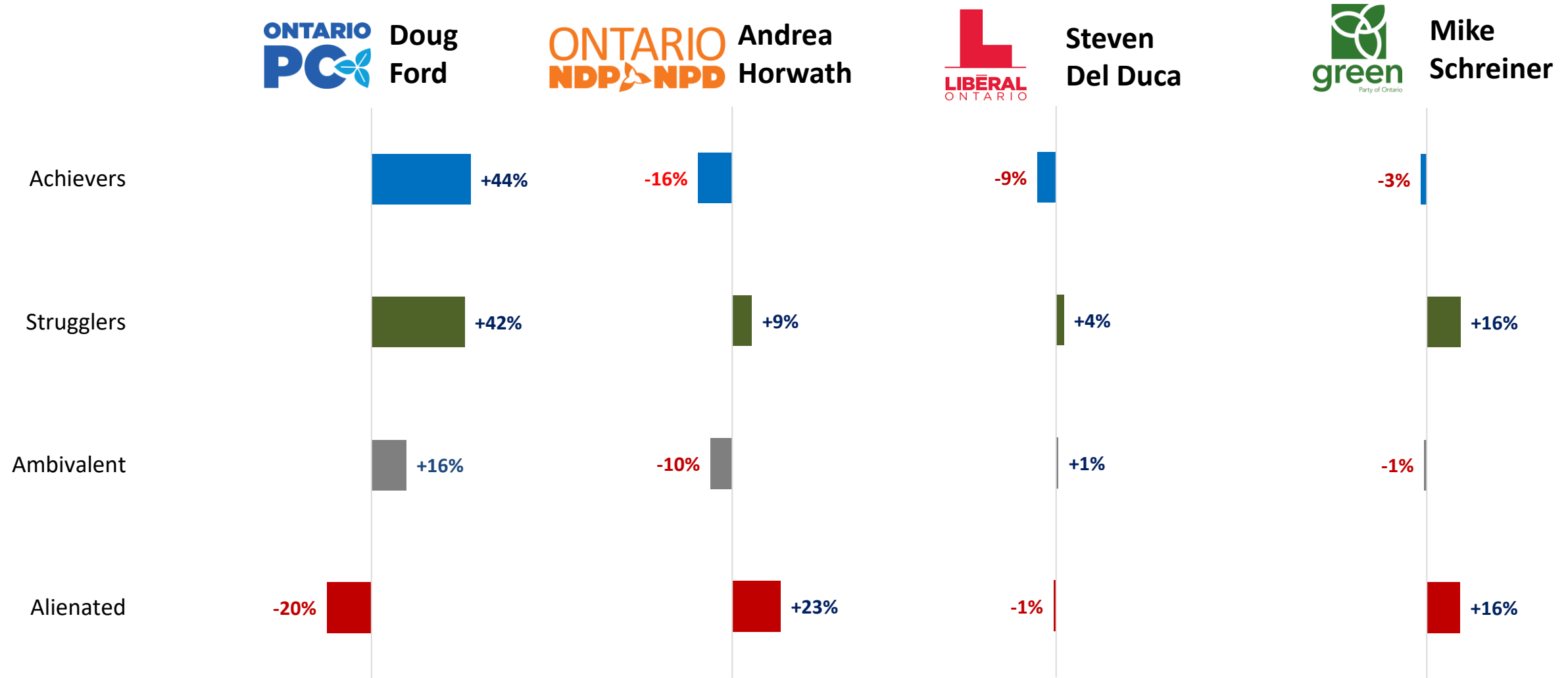
NET Favourability by Economic Gap:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 4 economic gap segments.

Leader favourability by Time for a Change: Those hostile towards the gov't show highest net favourability towards Horwath (+30%)

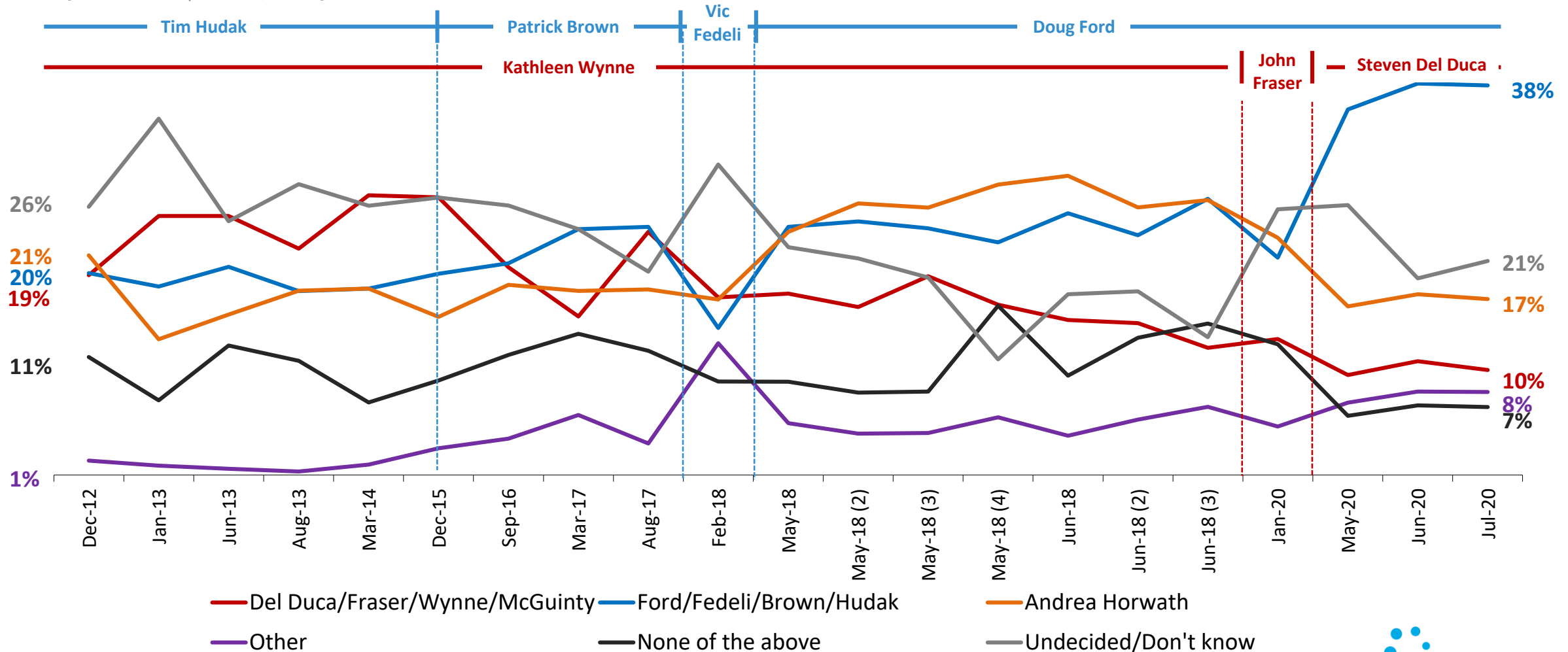|	**Doug Ford** (ONTARIO PC)	**Andrea Horwath** (ONTARIO NDP NPD)	**Steven Del Duca** (LIBERAL ONTARIO)	**Mike Schreiner** (green Party of Ontario)
Hostile	-81%	+30%	+21%	+23%
Soft anti-Government	-14%	+25%	+6%	+15%
Uncertain	+17%	+9%	-4%	+2%
Time for a change Government	+38%	+19%	+34%	+46%
Soft Government	+68%	-3%	+9%	+1%
Core Government	+96%	-49%	-37%	-19%

NET Favourability by Time for a Change:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 6 time for a change segments.

INNOVATIVE RESEARCH GROUP

Best Premier Tracking: Ford continues to have a strong lead over others as the leader who would make the best Premier of Ontario

Q Which of the following leaders would make the best Premier of Ontario?
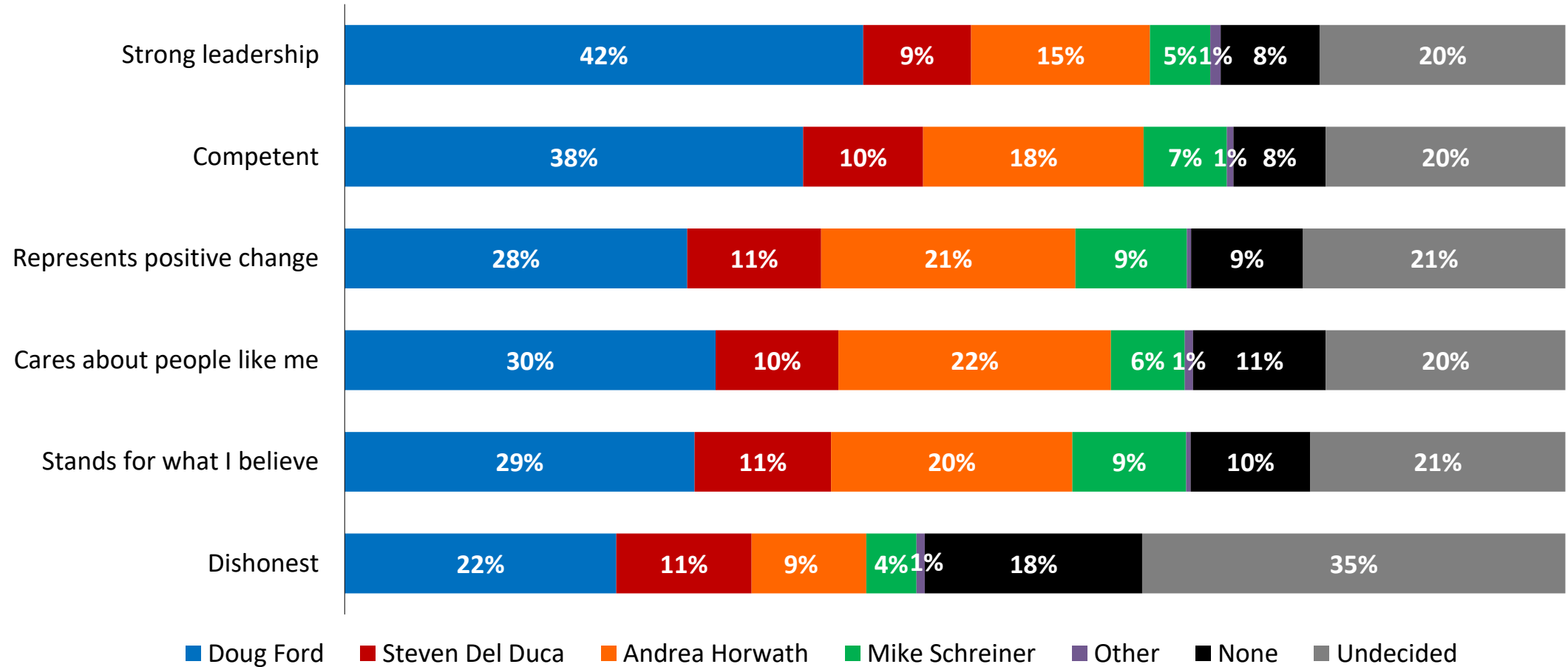[asked of all respondents; n=600]

Tim Hudak | Patrick Brown | Vic Fedeli | Doug Ford

Kathleen Wynne | John Fraser | Steven Del Duca

Legend:
- Del Duca/Fraser/Wynne/McGuinty
- Ford/Fedeli/Brown/Hudak
- Andrea Horwath
- Other
- None of the above
- Undecided/Don't know

Starting values: 21%, 20%, 19%, 11%, 1%
Ending values: 38%, 21%, 17%, 10%, 8%, 7%

X-axis: Dec-12, Jan-13, Jun-13, Aug-13, Mar-14, Dec-15, Sep-16, Mar-17, Aug-17, Feb-18, May-18, May-18 (2), May-18 (3), May-18 (4), Jun-18, Jun-18 (2), Jun-18 (3), Jan-20, May-20, Jun-20, Jul-20

Current data: July 2020

INNOVATIVE RESEARCH GROUP

Leader Qualities: Ford outperforms all other candidates on positive attributes, particularly on 'strong leadership' and 'competence'

Q Now we would like to read you a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes…
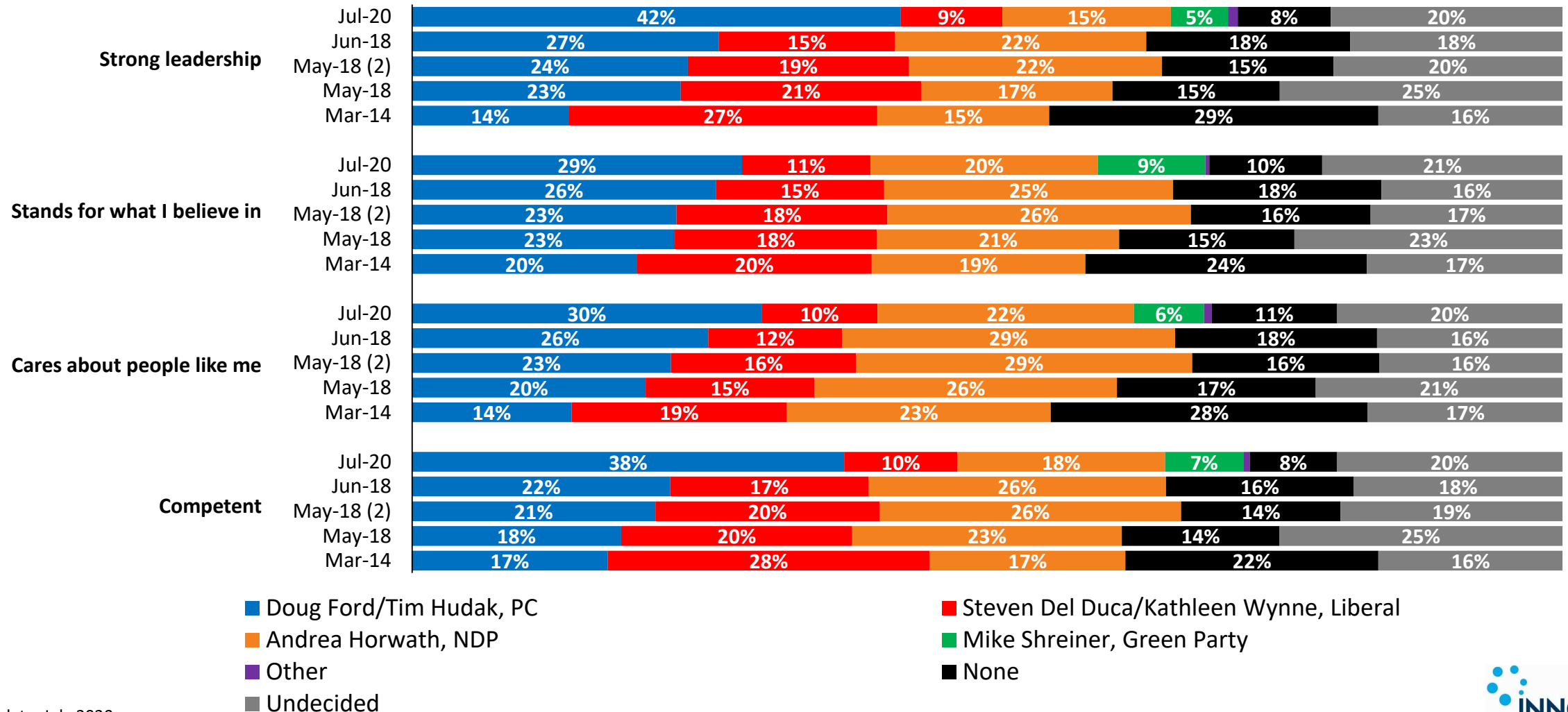
[asked of all respondents; n=600]

Attribute	Doug Ford	Steven Del Duca	Andrea Horwath	Mike Schreiner	Other	None	Undecided
Strong leadership	42%	9%	15%	5%	1%	8%	20%
Competent	38%	10%	18%	7%	1%	8%	20%
Represents positive change	28%	11%	21%	9%		9%	21%
Cares about people like me	30%	10%	22%	6%	1%	11%	20%
Stands for what I believe	29%	11%	20%	9%		10%	21%
Dishonest	22%	11%	9%	4%	1%	18%	35%

■ Doug Ford   ■ Steven Del Duca   ■ Andrea Horwath   ■ Mike Schreiner   ■ Other   ■ None   ■ Undecided

Current data: July 2020

INNOVATIVE RESEARCH GROUP

Leader Qualities: Ford has improved by double digits on 'strong leadership' & 'competence' since election; now holds commanding lead

Q Now we would like to read you a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes...

[asked of all respondents; n=600]

Strong leadership

	PC	Liberal	NDP	Green	Other	None	Undecided
Jul-20	42%	9%	15%	5%		8%	20%
Jun-18	27%	15%	22%			18%	18%
May-18 (2)	24%	19%	22%			15%	20%
May-18	23%	21%	17%			15%	25%
Mar-14	14%	27%	15%			29%	16%

Stands for what I believe in

	PC	Liberal	NDP	Green	Other	None	Undecided
Jul-20	29%	11%	20%	9%		10%	21%
Jun-18	26%	15%	25%			18%	16%
May-18 (2)	23%	18%	26%			16%	17%
May-18	23%	18%	21%			15%	23%
Mar-14	20%	20%	19%			24%	17%

Cares about people like me

	PC	Liberal	NDP	Green	Other	None	Undecided
Jul-20	30%	10%	22%	6%		11%	20%
Jun-18	26%	12%	29%			18%	16%
May-18 (2)	23%	16%	29%			16%	16%
May-18	20%	15%	26%			17%	21%
Mar-14	14%	19%	23%			28%	17%

Competent

	PC	Liberal	NDP	Green	Other	None	Undecided
Jul-20	38%	10%	18%	7%		8%	20%
Jun-18	22%	17%	26%			16%	18%
May-18 (2)	21%	20%	26%			14%	19%
May-18	18%	20%	23%			14%	25%
Mar-14	17%	28%	17%			22%	16%

Legend:
- Doug Ford/Tim Hudak, PC
- Steven Del Duca/Kathleen Wynne, Liberal
- Andrea Horwath, NDP
- Mike Shreiner, Green Party
- Other
- None
- Undecided

Current data: July 2020

Note: Prior to July 2020, the Green Party leader and "Other" were not given as options and the final options were "none of them stand out" and "don't know".

INNOVATIVE RESEARCH GROUP

The PCs and Liberals are in a tight race in vote share

Innovative reports on vote intention in two ways.

When we ask people who they would vote for if an election were held today, and who they lean towards if they are unsure, we call those results **Combined vote.** This accounts for the views of everyone in the population including decided voters, undecided voters, and non-voters.
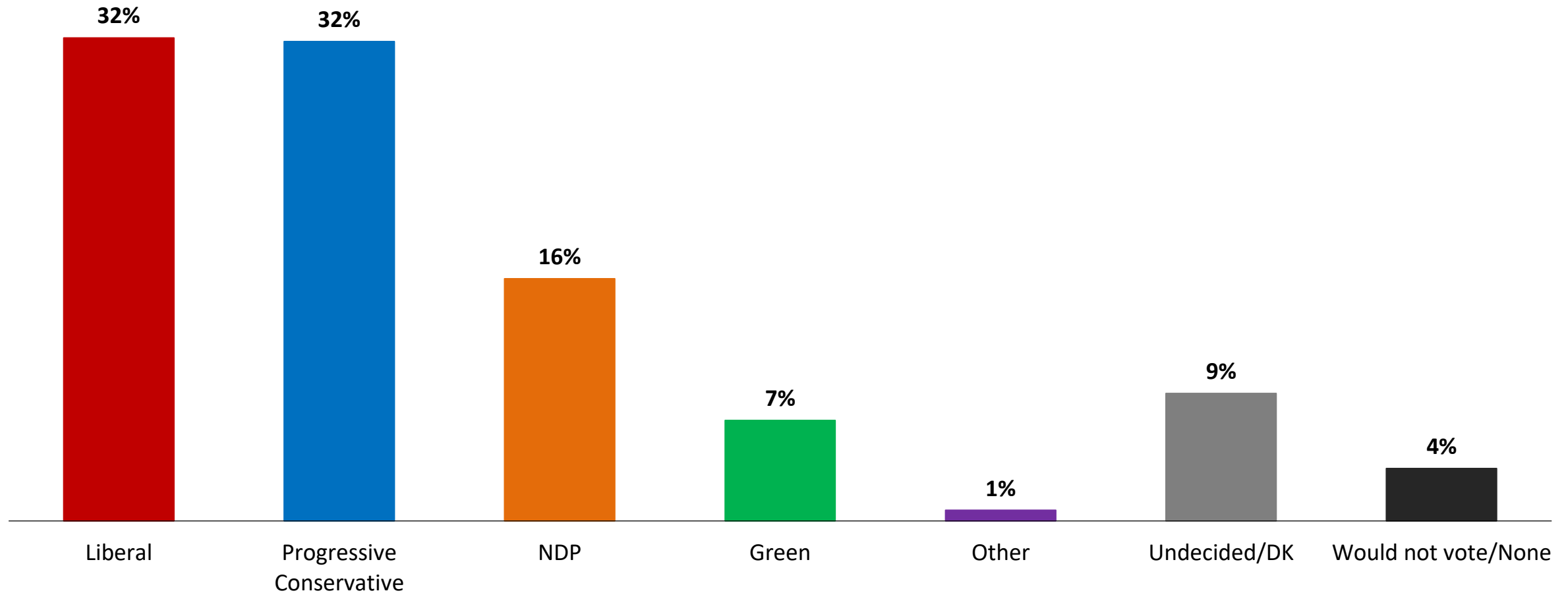
When we look at the results among *only* decided voters, we call that **Decided vote.** These results most tell us what the election results would be like if the survey results matched the election exactly.

Provincial Combined Vote: Despite Ford's strong leadership numbers and approval, the PCs and Liberals are neck-and-neck in 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=600]

Liberal	Progressive Conservative	NDP	Green	Other	Undecided/DK	Would not vote/None
32%	32%	16%	7%	1%	9%	4%

Current data: July 2020

INNOVATIVE
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Provincial Vote Tracking: The Liberals have lost their slight lead over the PCs in vote share and are now tied at 32% of the vote each

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=600]

Legend: —— Progressive Conservative —— Liberal —— NDP —— Green —— Other —— Undecided/DK —— Would not vote/None

Left axis values: 28%, 27%, 25%, 11%, 6%, 2%, 1%

Right axis values: 32%, 32%, 16%, 9%, 7%, 4%, 1%

X-axis: Jan-13, Apr-13, Dec-13, Jan-14, Mar-14, Apr-14, Jun-14, Sep-14, Oct-14, Dec-14, Jan-15, Mar-15, Apr-15, May-15, Jul-15, Nov-15, Dec-15, Feb-16, Mar-16, Apr-16, Jun-16, Aug-16, Sep-16, Oct-16, Nov-16, Dec-16, Jan-17, Feb-17, Mar-17, Apr-17, May-17, Jun-17, Aug-17, Oct-17, Dec-17, Jan-18, Feb-18, Mar-18, Apr-18, May-18, Jun-18, Jul-18, Aug-18, Sep-18, Oct-18, Nov-18, Dec-18, Jan-19, Feb-19, Mar-19, Apr-19, Apr-19 (2), May-19, Jun-19, Jul-19, Oct-19, Nov-19, Dec-19, Jan-20, Feb-20, Mar-20, Apr-20, May-20, Jun-20, Jun-20 (2), Jul-20

Current data: July 2020

INNOVATIVE RESEARCH GROUP

Provincial Decided Vote: Among decided voters, the Liberals (37%) and PCs (36%) are tied while the NDP (18%) trails

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[decided voters only; n=528]

Current data: July 2020

INNOVATIVE
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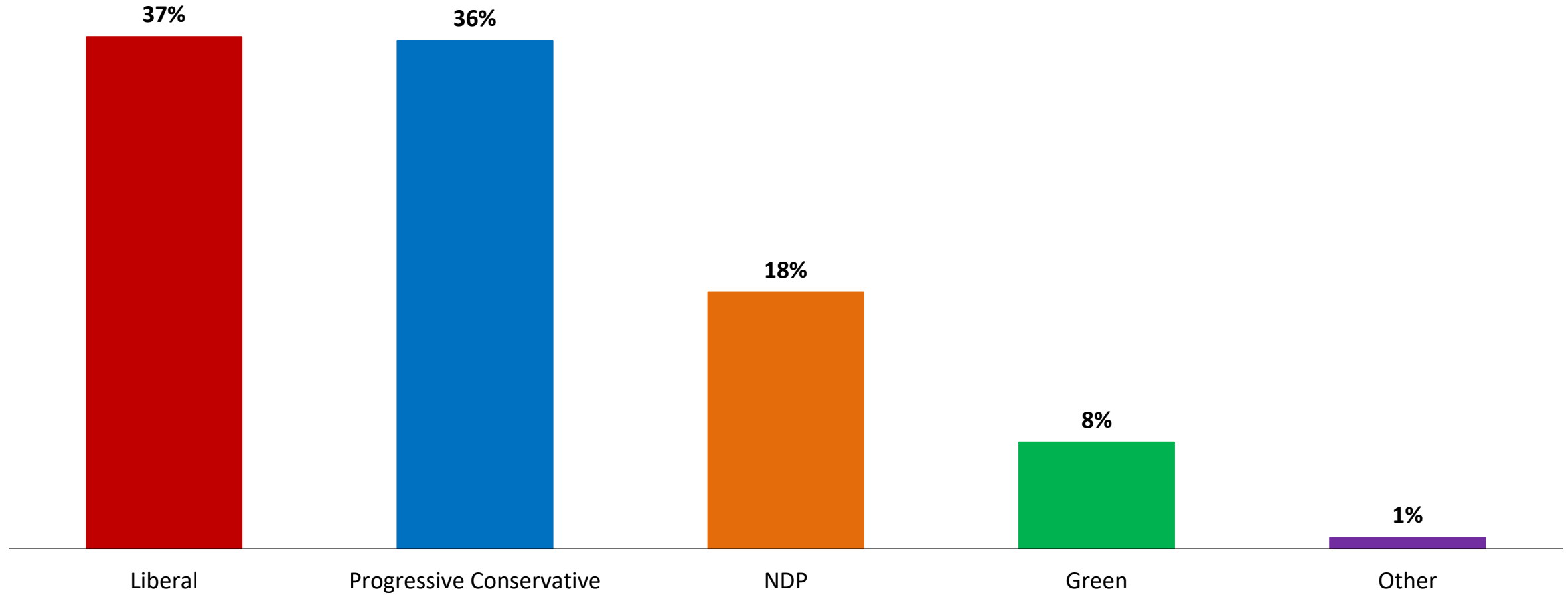
Provincial Decided Vote Tracking: The Liberals have lost their slight lead over the PCs in decided vote

Q If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=528]

Current data: July 2020
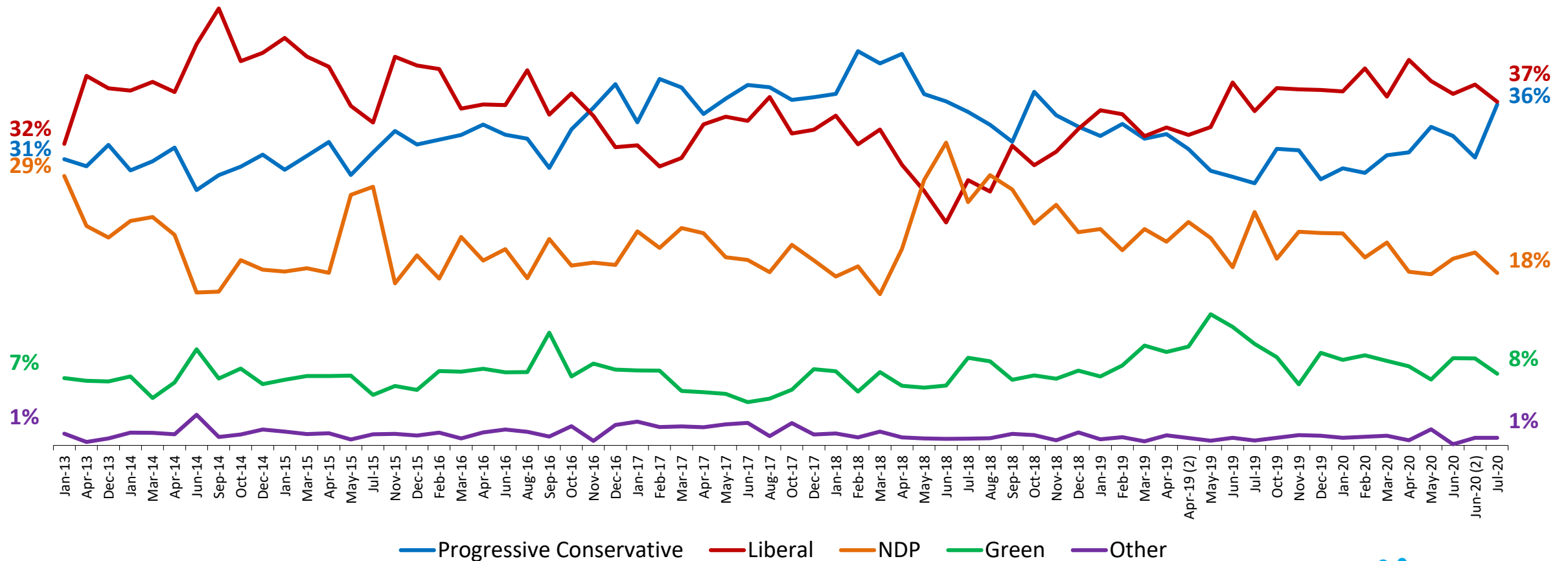
Decided Vote by Region: The Liberals have a strong lead in Toronto while the PCs are slightly ahead in the South/West and 'Rest of GTA'

Decided vote by Region

	Region			
Decided Vote	**Toronto**	**Rest of GTA**	**South/West**	**North/East**
	(N=114)	(N=136)	(N=136)	(N=142)
Liberal	44%	35%	30%	38%
Progressive Conservative	30%	41%	35%	39%
NDP	20%	17%	24%	14%
Green	5%	7%	10%	8%
Other	1%	0%	1%	1%

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Note: Current data: July 2020

Decided Vote by Value Cluster: While the PCs lead among Conservative groups, the Liberals lead in all other value clusters

Value Clusters

Federal Decided Vote	Deferential Conservatives (N=51)	Populist Conservatives (N=67)	Business Liberals (N=137)	Left Liberals (N=75)	Thrifty Moderates (N=88)	Core Left (N=111)
Liberal	27%	11%	48%	43%	36%	40%
Progressive Conservative	63%	85%	36%	23%	30%	10%
NDP	7%	1%	11%	26%	19%	37%
Green	3%	2%	5%	7%	15%	11%
Other	0%	1%	0%	2%	1%	2%

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Note: Current data: July 2020

Tracking Decided Vote by Cluster: The Liberals are up slightly among Left Liberals and Thrifty Moderates

Left Liberals
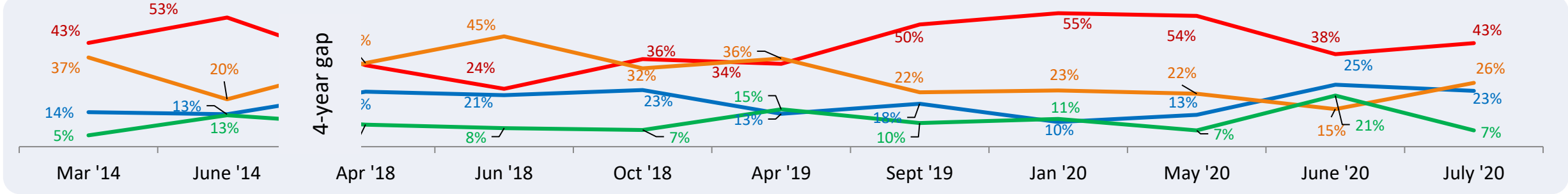
Thrifty Moderates
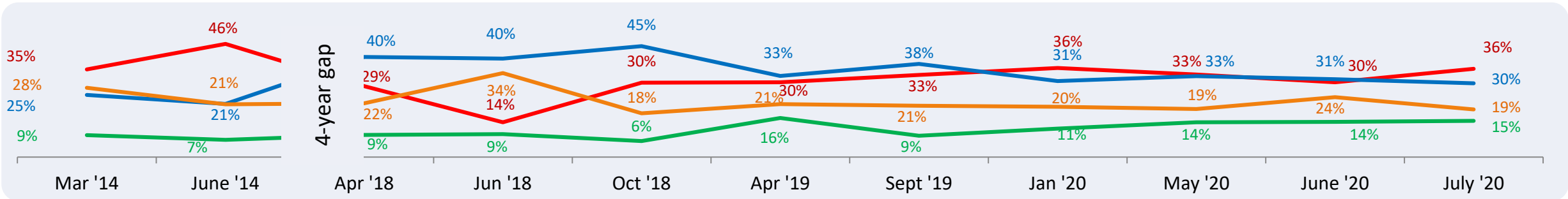
Core Left

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

Note: Current data: July 2020
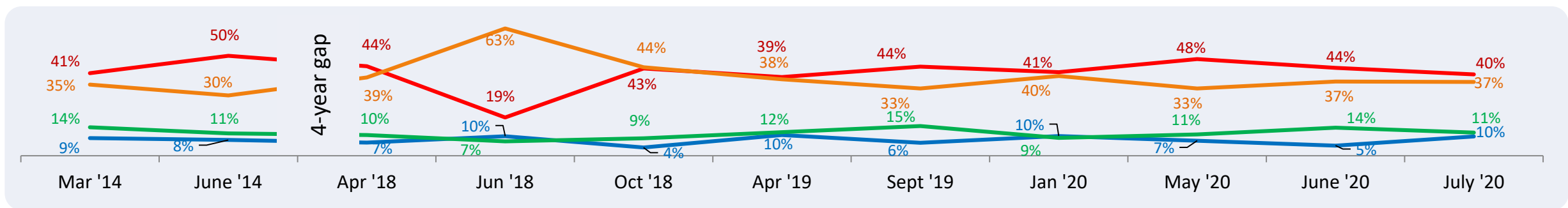
Tracking Decided Vote by Cluster: The PCs are up among Conservative groups, but the Liberals have the edge among Business Liberals
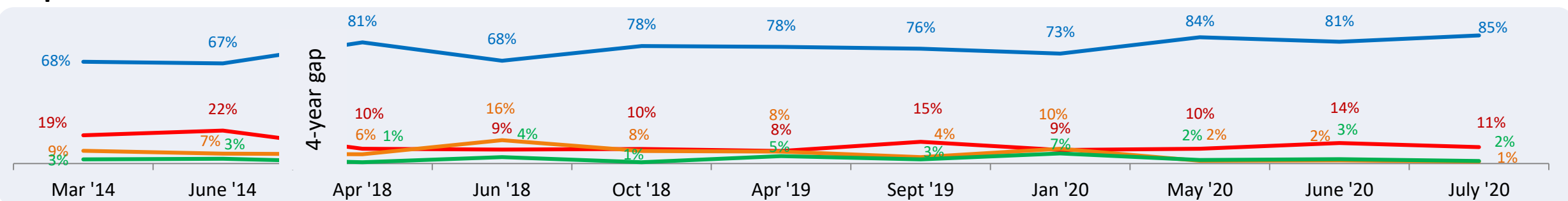
Business Liberals
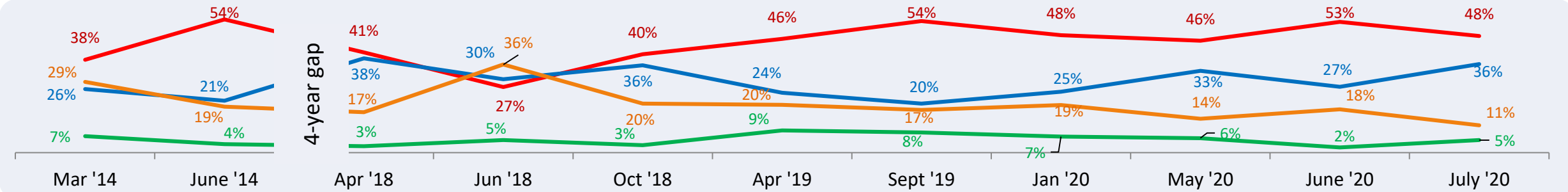

Deferential Conservatives
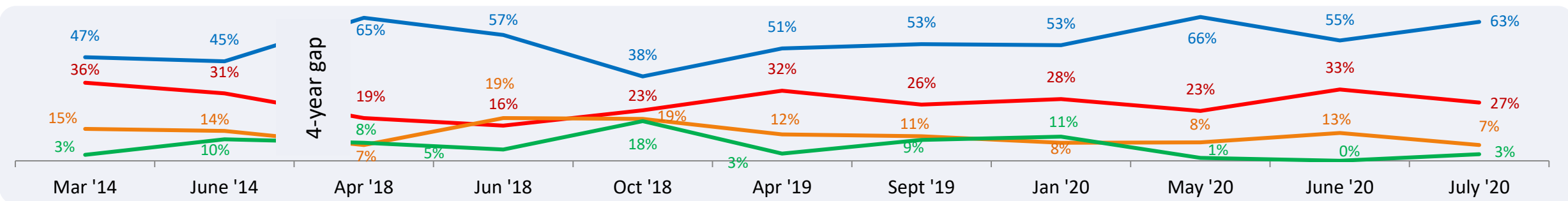
Populist Conservatives

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

Note: Current data: July 2020

Decided Vote by Economic Gap: The PCs have the lead in vote among Achievers & Strugglers but Liberals lead for Ambivalent & Alienated

Economic Gap

Federal Decided Vote	Achievers (N=188)	Strugglers (N=124)	Ambivalent (N=87)	Alienated (N=129)
Liberal	34%	33%	45%	38%
Progressive Conservative	50%	42%	30%	16%
NDP	10%	18%	15%	33%
Green	6%	6%	11%	10%
Other	0%	1%	0%	2%

Note: Current data: July 2020

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Tracking Decided Vote by Economic Gap: The Liberals now lead over the PCs among 'Ambivalent' group
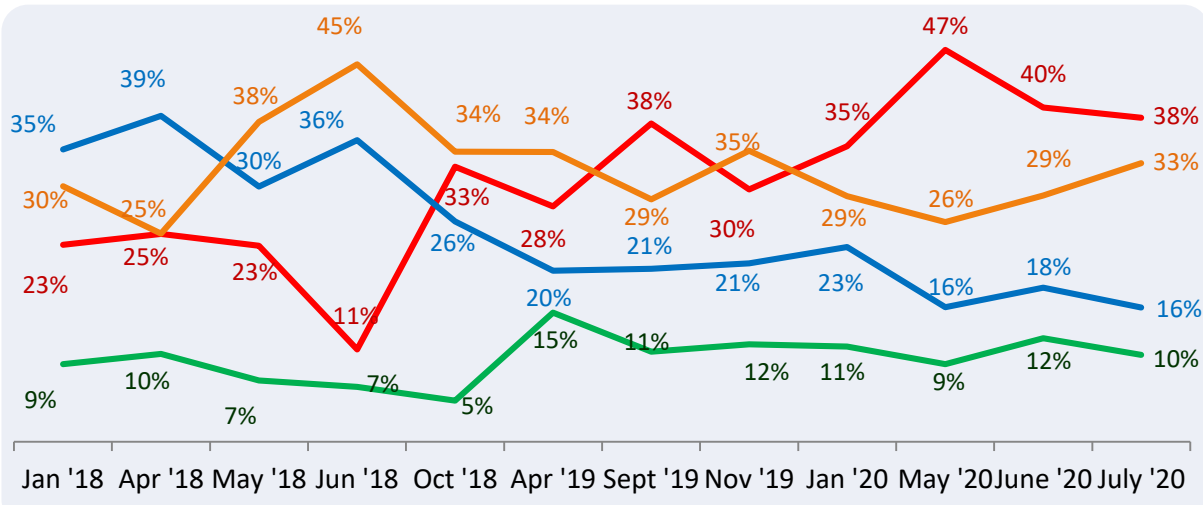
Canadian Dream Achievers
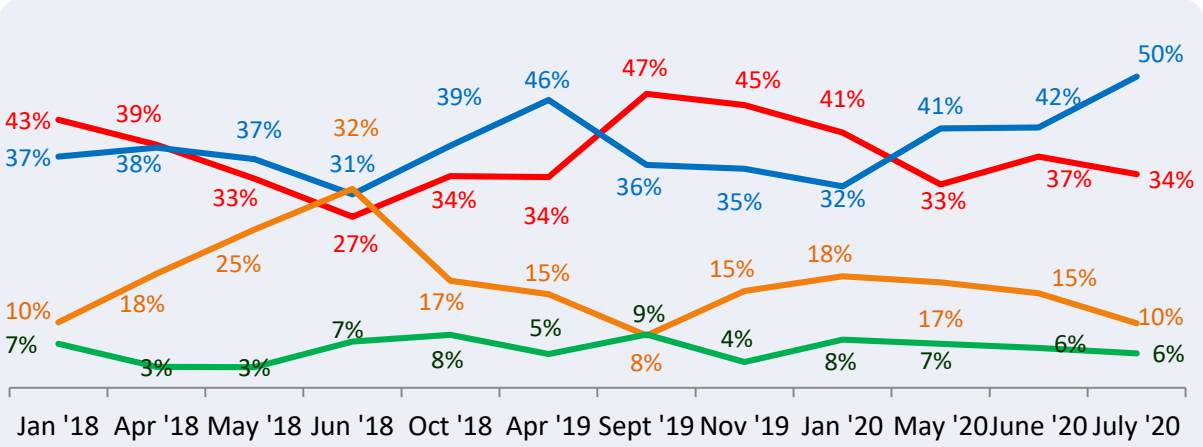
Canadian Dream Strugglers
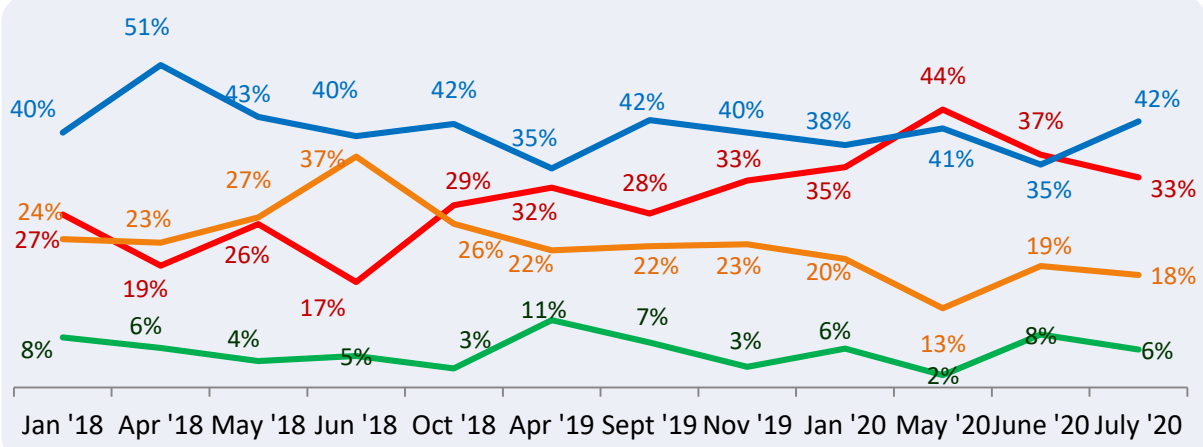
Ambivalent
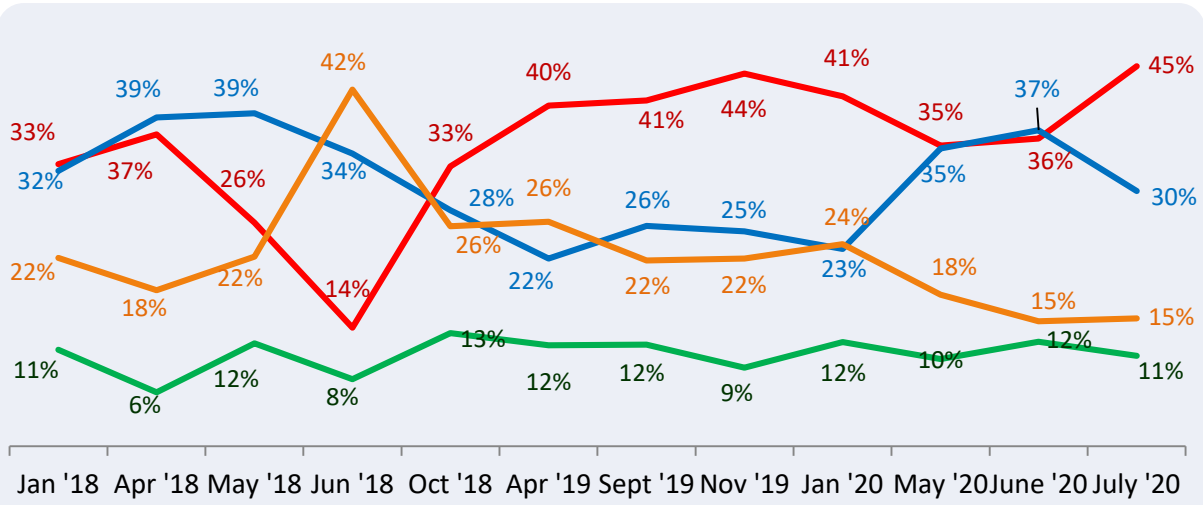
Alienated

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

Note: Current data: July 2020

Decided Vote by Time for Change: The top vote choice among anti-PC Ontarians and 'time for a change PC' is the Liberals

Time for Change

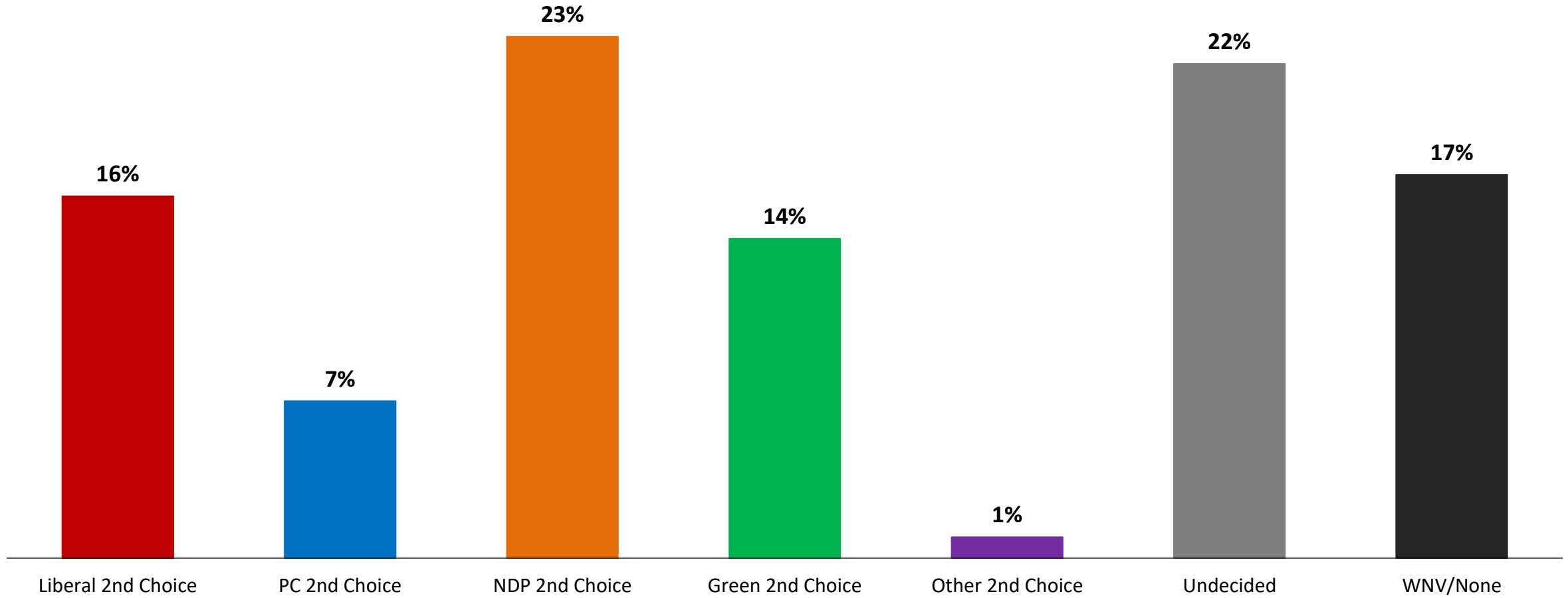| Decided Vote	Core PC (N=157)	Soft PC (N=44)	Time for a change PC (N=47)	Uncertain (N=61)	Soft anti-PC (N=135)	Hostile (N=83)
Liberal	9%	35%	47%	51%	51%	49%
Progressive Conservative	86%	38%	29%	16%	11%	3%
NDP	2%	18%	11%	24%	26%	37%
Green	2%	10%	13%	9%	10%	10%
Other	0%	0%	0%	1%	2%	1%

Note: Current data: July 2020

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Provincial 2nd Choice: Most are either undecided on their 2nd choice or wouldn't vote; otherwise top 2nd choice is the NDP (23%)

Q And which party would be your second choice?
[only decided voters; n=528]

Liberal 2nd Choice	PC 2nd Choice	NDP 2nd Choice	Green 2nd Choice	Other 2nd Choice	Undecided	WNV/None
16%	7%	23%	14%	1%	22%	17%

Current data: July 2020

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Provincial 2nd Choice: The top 2nd choice of the Liberals is the NDP and vice versa while PC voters are mostly undecided on their 2nd choice

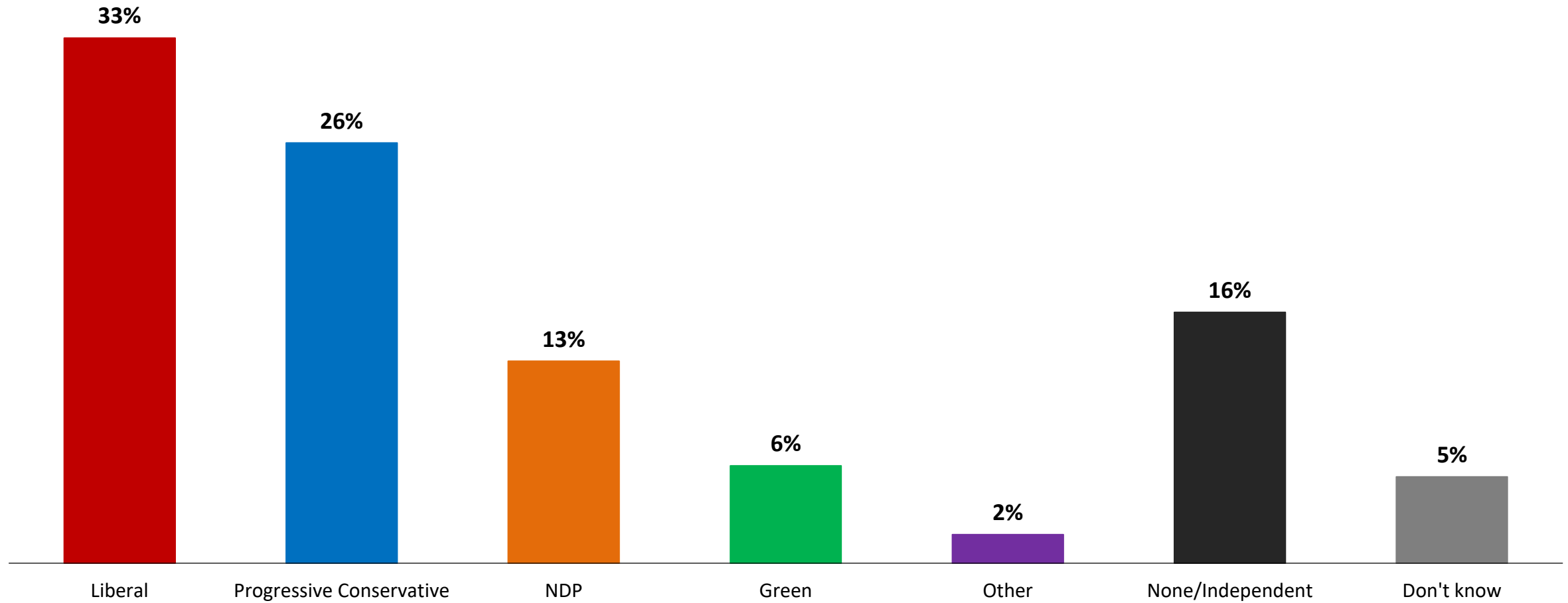And which party would be your second choice? BY [Vote+Lean]

First Choice

	Liberal 1st Choice	PC 1st Choice	NDP 1st Choice	Green 1st Choice
	(N=194)	(N=192)	(N=97)	(N=40)
Liberal 2nd Choice		15%	45%	28%
PC 2nd Choice	11%		8%	19%
NDP 2nd Choice	44%	12%		31%
Green 2nd Choice	16%	9%	25%	
Other 2nd Choice	1%	1%	0%	2%
Undecided	18%	32%	13%	15%
WNV/None	10%	31%	8%	6%

Second Choice

Note: 'Other' in Combined Vote not shown due to insufficient sample size.
Current data: July 2020

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Provincial Party ID: While the Liberals and PCs are neck-and-neck when it comes to vote, the Liberals (33%) lead in party ID

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a…
[asked of all respondents; n=600]

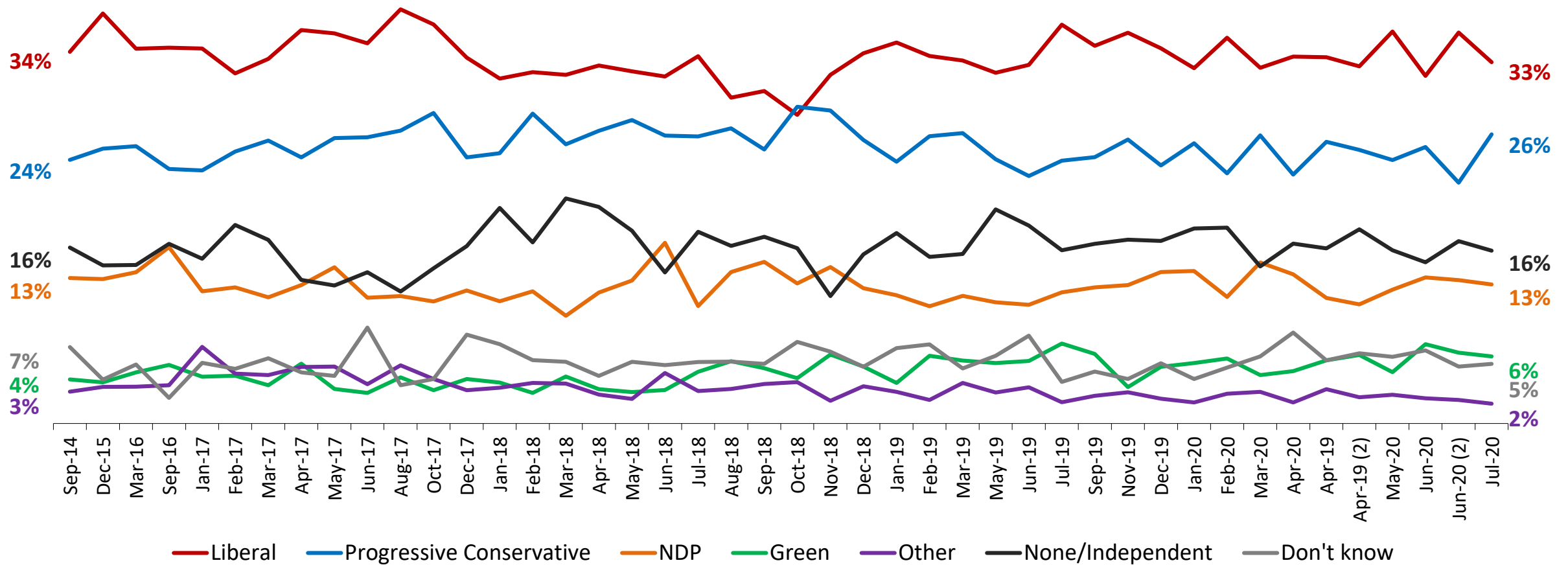| Liberal	Progressive Conservative	NDP	Green	Other	None/Independent	Don't know
33%	26%	13%	6%	2%	16%	5%

Current data: July 2020

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Provincial Party ID Tracking: The Liberals still lead on party ID, but the gap narrows to seven points between Liberals (33%) and PCs (26%)

Q Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a…
[asked of all respondents; n=600]

Liberal — Progressive Conservative — NDP — Green — Other — None/Independent — Don't know

Current data: July 2020

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Combined Vote by Party ID: PC partisans appear the most loyal with 88% of their vote going towards their own party

Provincial Party Identification

Provincial Combined Vote	Liberal (N=196)	Progressive Conservative (N=157)	NDP (N=75)	Green (N=36)	Unaligned (N=126)
Liberal	76%	6%	14%	17%	14%
Progressive Conservative	11%	88%	4%	2%	21%
NDP	9%	3%	78%	8%	10%
Green	2%	2%	1%	72%	5%
Other	0%	0%	0%	0%	1%
Undecided/DK	2%	1%	3%	0%	34%
Would not vote/None	0%	0%	1%	0%	15%

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Note: Current data: July 2020; 'Other' party ID not shown due to insufficient sample size
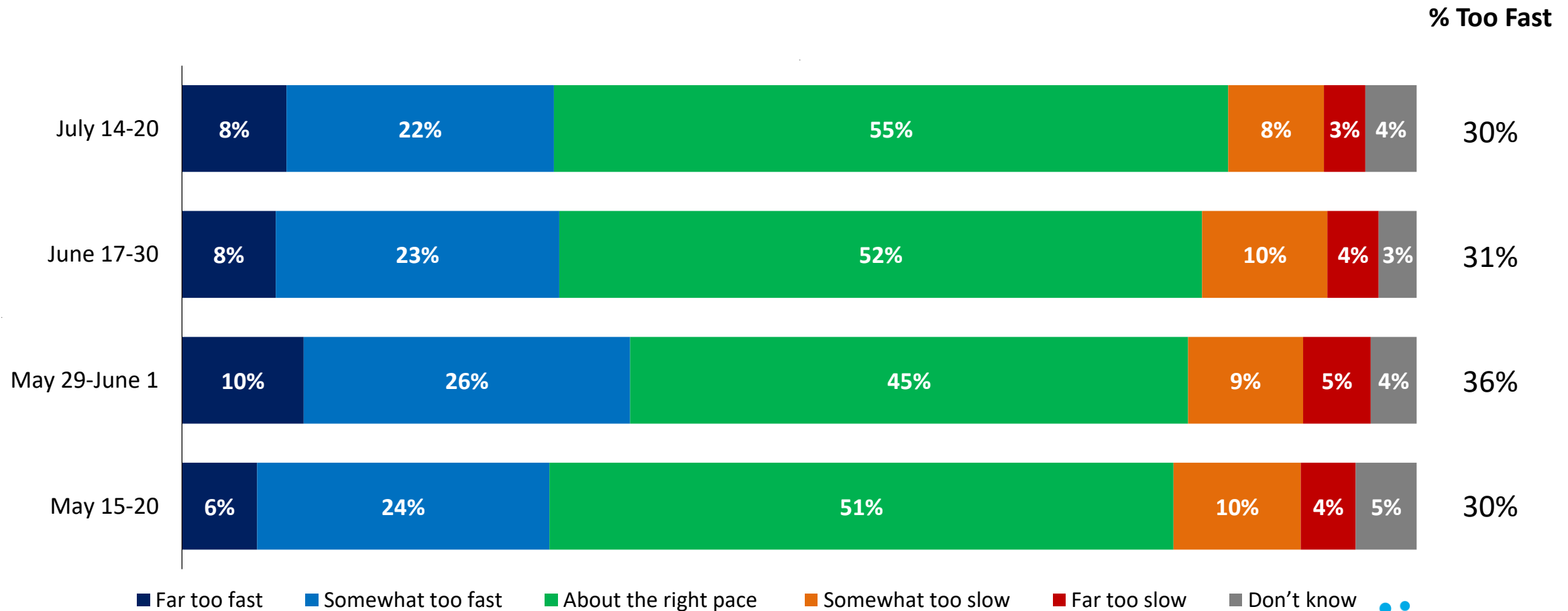
Reopening

Attitudes towards the pace of reopening remain stable, with most saying the Ontario government is going at the right pace.

Easing Restrictions, Provincial: Those saying the Ontario government has gone 'too fast' in easing restrictions is steady since June

Q Now, thinking about the steps the **provincial** government in Ontario has taken so far to ease restrictions on businesses and social contacts, do you think the provincial government has gone too fast, has gone too slow, or has gone about the right pace?
[asked of all respondents; n=600]

% Too Fast

	Far too fast	Somewhat too fast	About the right pace	Somewhat too slow	Far too slow	Don't know	% Too Fast
July 14-20	8%	22%	55%	8%	3%	4%	30%
June 17-30	8%	23%	52%	10%	4%	3%	31%
May 29-June 1	10%	26%	45%	9%	5%	4%	36%
May 15-20	6%	24%	51%	10%	4%	5%	30%

Legend: ■ Far too fast ■ Somewhat too fast ■ About the right pace ■ Somewhat too slow ■ Far too slow ■ Don't know

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Note: Current data: July 2020

Methodology

Survey Methodology

These are the results of an online survey conducted between July 14th and July 20th, 2020.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. 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.

Sample Size: n=974 Ontario residents, 18 years or older. The results are weighted to n=600 based on Census data from Statistics Canada.

Field Dates: July 14th to July 20th, 2020.

Weighting: 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 in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	86	8.8%	83	13.8%
Men 35-54	125	12.8%	100	16.6%
Men 55+	265	27.2%	106	17.7%
Women 18-34	143	14.7%	83	13.8%
Women 35-54	176	18.1%	107	17.8%
Women 55+	179	18.4%	122	20.3%
Toronto	224	23%	125	20.9%
Rest of GTA	236	24.2%	156	26%
South/West	249	25.6%	155	25.8%
North/East	265	27.2%	164	27.3%

INNOVATIVE RESEARCH GROUP

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