

Ontario's Budget

Public Opinion Research
Release Date: November 19, 2020
Field Dates: November 5 to 18, 2020

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Since 2006, INNOVATIVE has been tracking reaction towards provincial budgets across the country.

Today, INNOVATIVE is releasing results from November Canada This Month survey. This online survey was in field from November 6th to 18th with a weighted sample size of 1,200 Ontario residents. Detailed methodology is provided in the appendix.

This report covers reaction to the latest Ontario budget, include attention and satisfaction in multiple different areas. We find Ontarians are paying less attention to this budget than any since tracking began, but impressions of this budget are significantly improved from the 2019 budget.

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

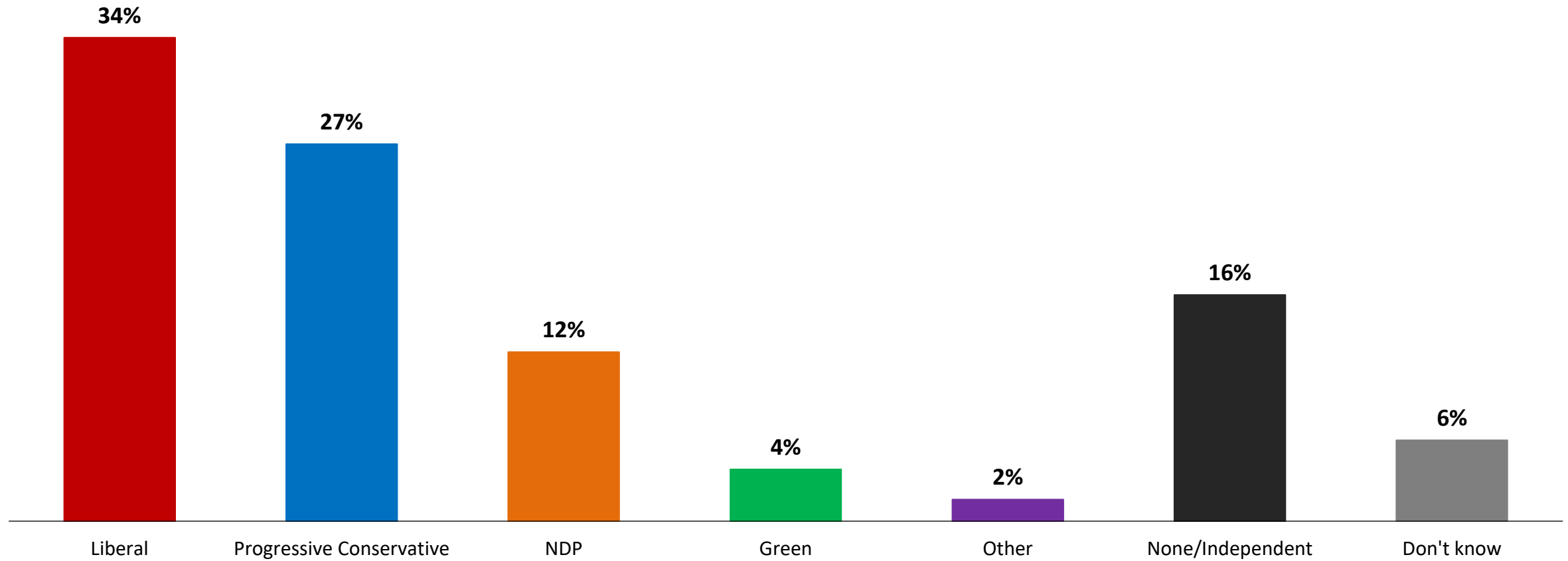
We use these segments throughout the remainder of the report to analyze attitudes toward the budget.

Provincial Party ID: The Liberals (3%) lead in party ID over the Progressive Conservatives (27%) and the NDP (12%)



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

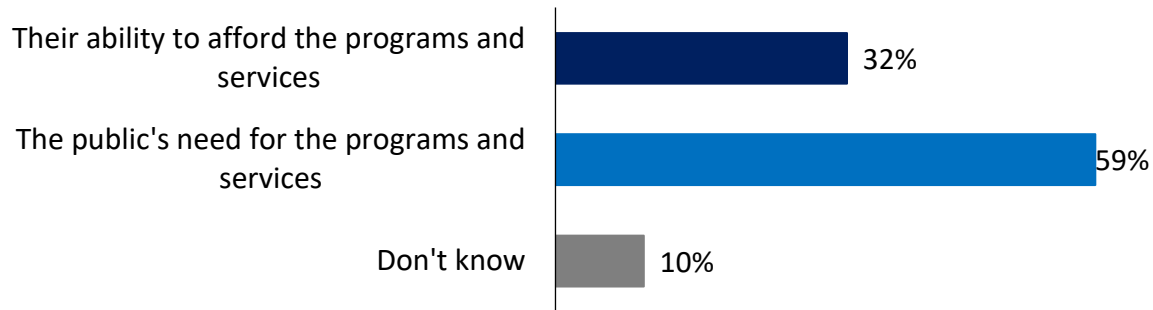
[asked of all respondents; n=1,200]



Core Political Values: More than half say the government should focus on the public's need rather than its ability to afford services

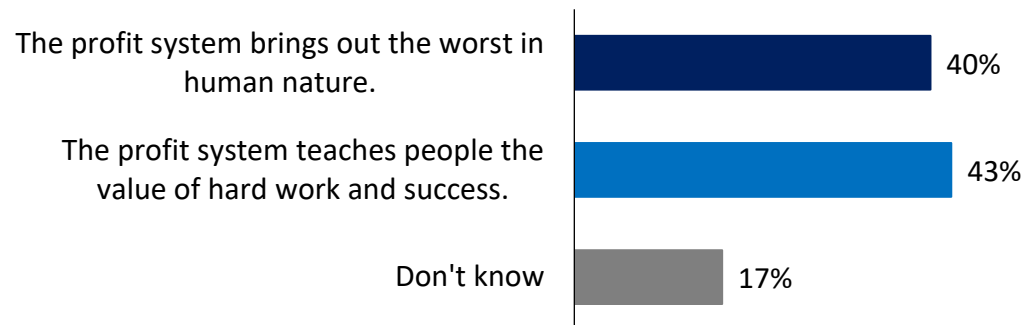
Q Now we would like to ask a few questions about basic values and society...When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?

[asked of all respondents; n=1,200]



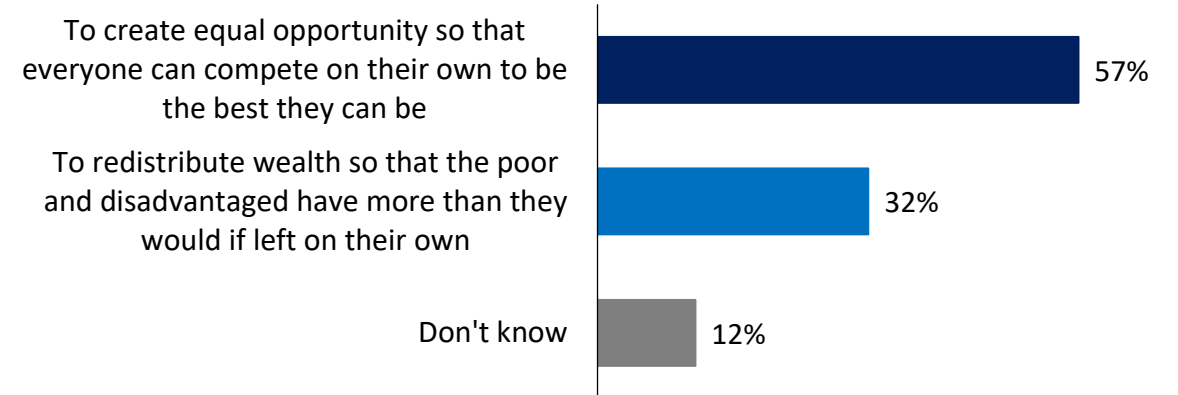
Q Which of the following statements comes closest to your view?

[asked of all respondents; n=1,200]



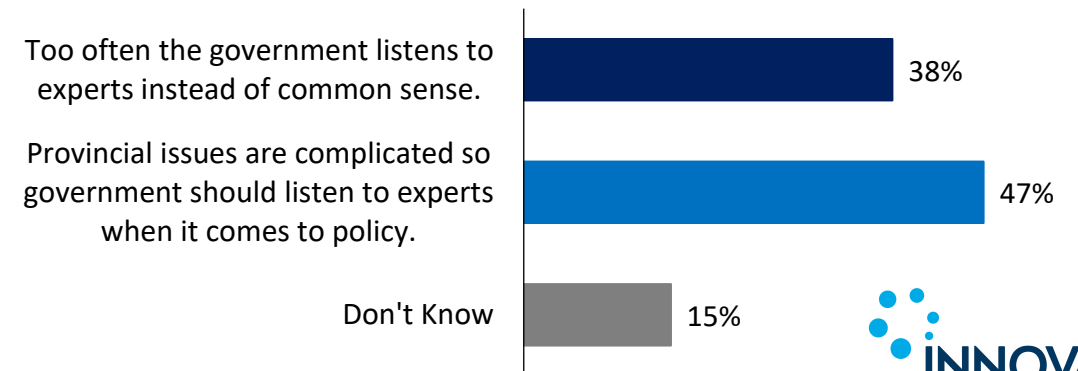
Q Is the main role of government to...?

[asked of all respondents; n=1,200]



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

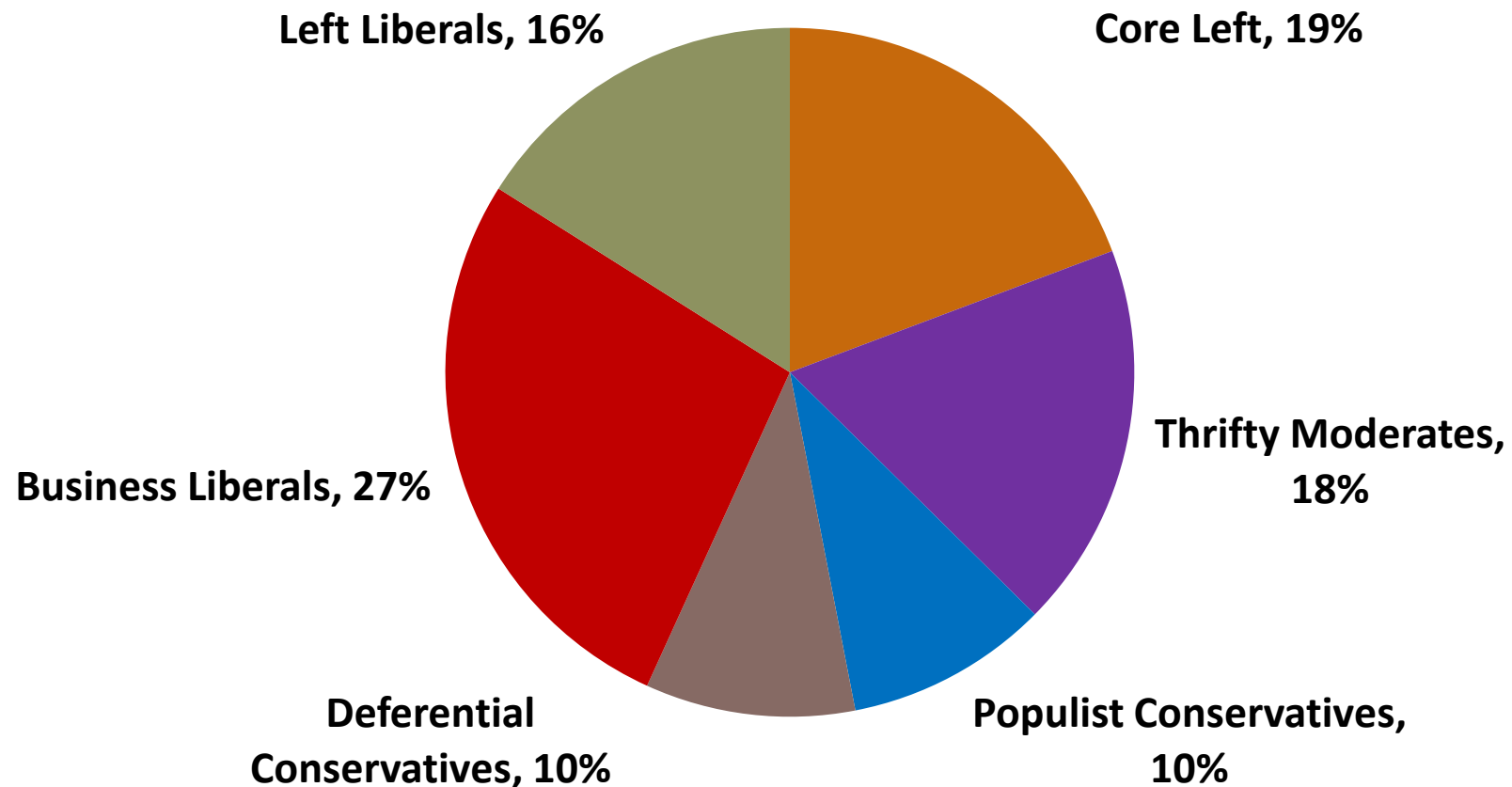
[asked of all respondents; n=1,200]



Value Clusters: Business Liberals (27%) are the largest segment, followed by Thrifty Moderates (18%)

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=1,200]



Defining Value Clusters

Core Political Values by Value Clusters

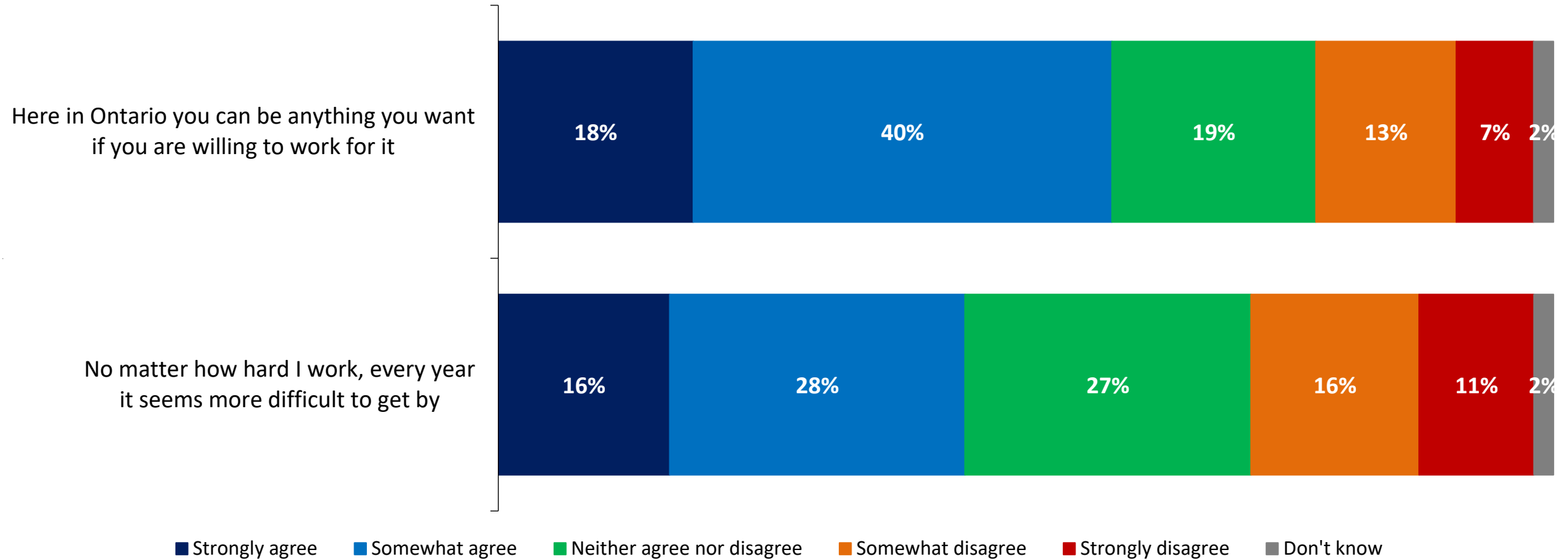
Column %		Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
Governments should base decisions on...	Ability to afford	0%	73%	95%	94%	0%	0%
	Public Need	96%	0%	0%	0%	96%	89%
Is the main role of government to .?	Create equal Opportunity	0%	36%	98%	80%	63%	97%
	Redistribute wealth	94%	32%	0%	14%	24%	0%
When it comes to government decision making...	Rely on common sense	26%	44%	100%	0%	30%	43%
	Listen to experts	59%	27%	0%	87%	57%	43%
The profit system...	Brings out the worst in human nature	84%	60%	0%	0%	0%	83%
	Teaches value of hard work and success	0%	10%	95%	88%	85%	0%

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



Do you agree or disagree with the following statements?

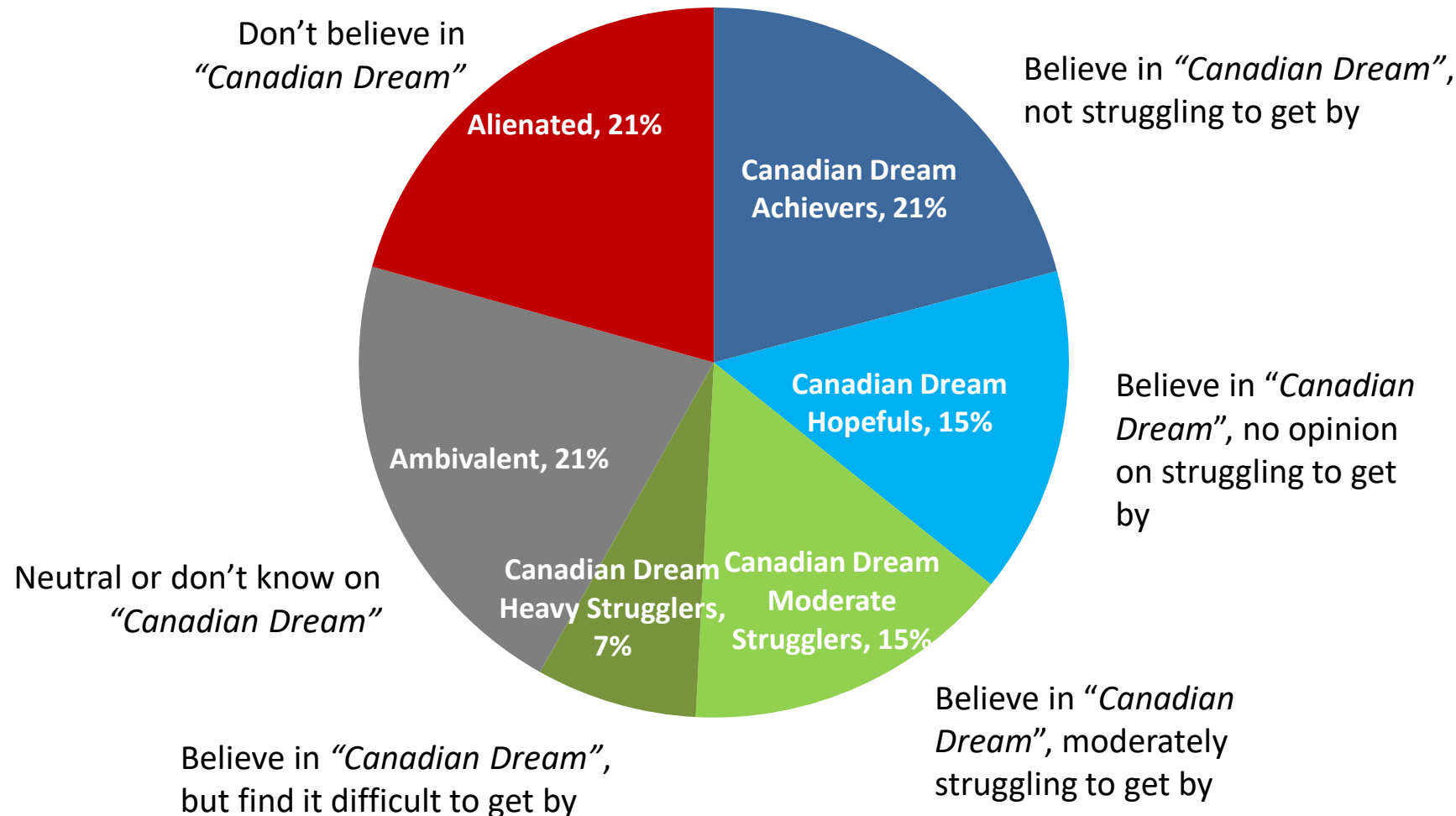
[asked of all respondents; n=1,200]



Economic Gap Segmentation: 36% are either Dream Achievers (21%) or Dream Hopefuls (15%)

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=1,200]



Ontario's Budget

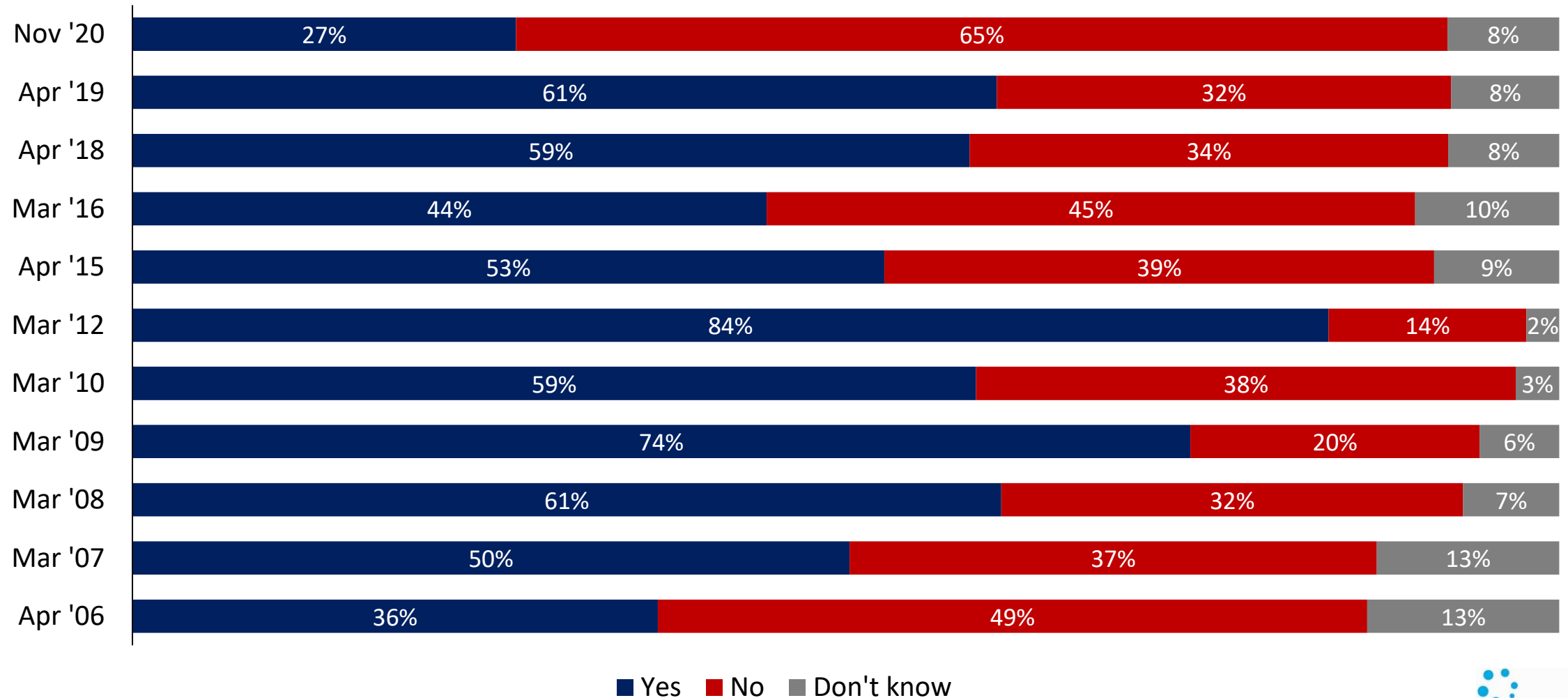
Attention to the budget is at an all time low, dropping to only 27% from 61% last year. However, among those paying attention to the budget, the reaction is significantly more positive than it was last year.

RSH Budget Tracking: Attention to the Ontario budget is the lowest since tracking began at only 27%



Have you read, seen or heard anything about the recent provincial budget that was presented in the Legislature on November 5, 2020?

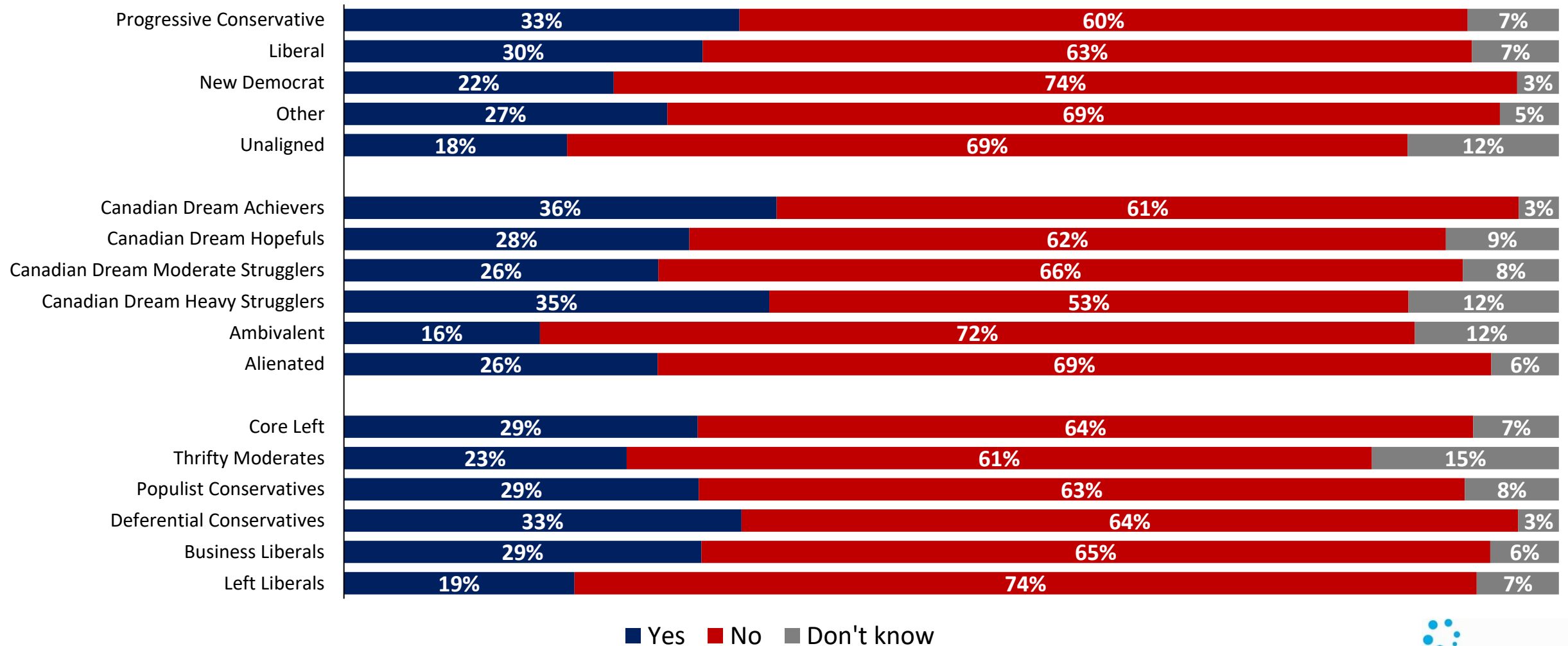
[asked of all respondents, n=1,200]



RSH Budget by Segment: Attention is highest among Dream Achievers (36%) and Heavy Strugglers (35%)



Have you read, seen or heard anything about the recent provincial budget that was presented in the Legislature on November 5, 2020? By SEGMENT
[asked of all respondents, n=1,200]

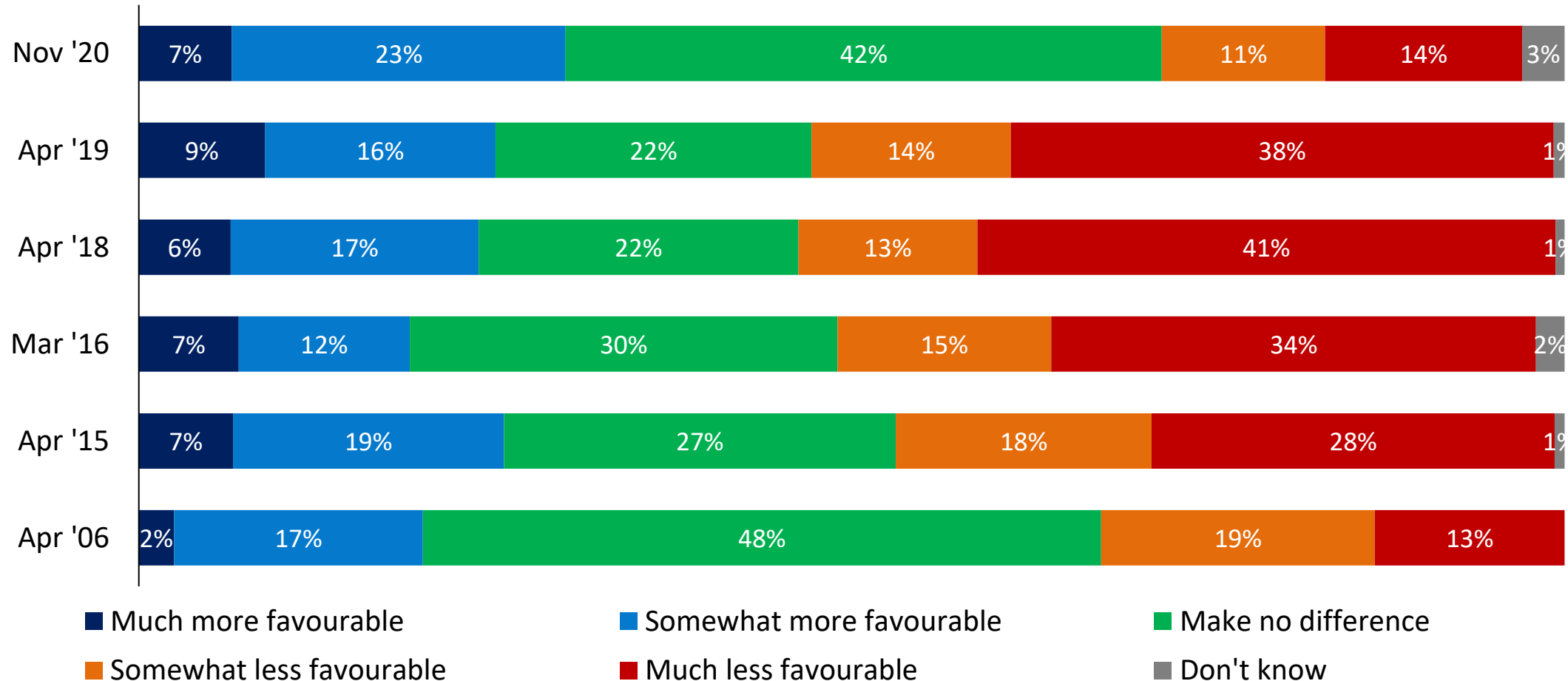


RSH Impact Tracking: Ontarians are far less likely to say the new budget left them less favourable than in 2019¹³



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

[asked of those aware of budget, n=323]



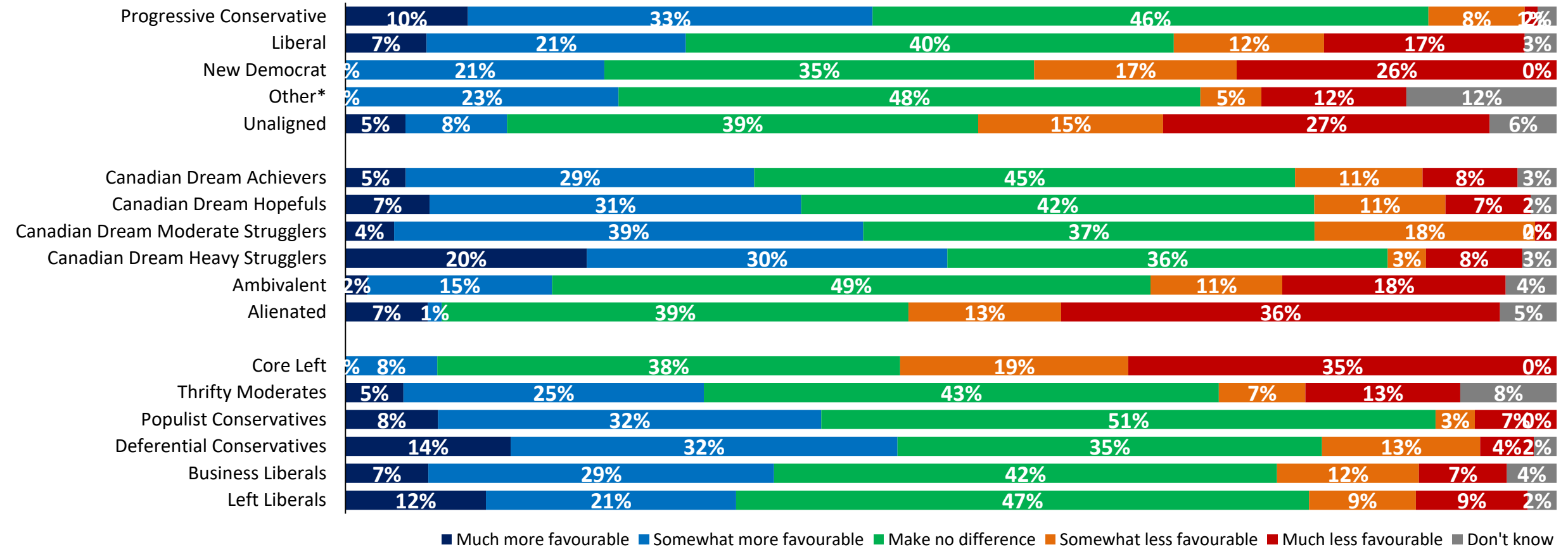
Note: "Don't know" is not provided as an option in Apr '06.

RSH Impact by Segment: The impact is most positive among Moderate Strugglers and Heavy Strugglers



Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, or a lot less favourable towards the provincial Progressive Conservative government? By SEGMENT

[asked of those aware of budget, n=323]

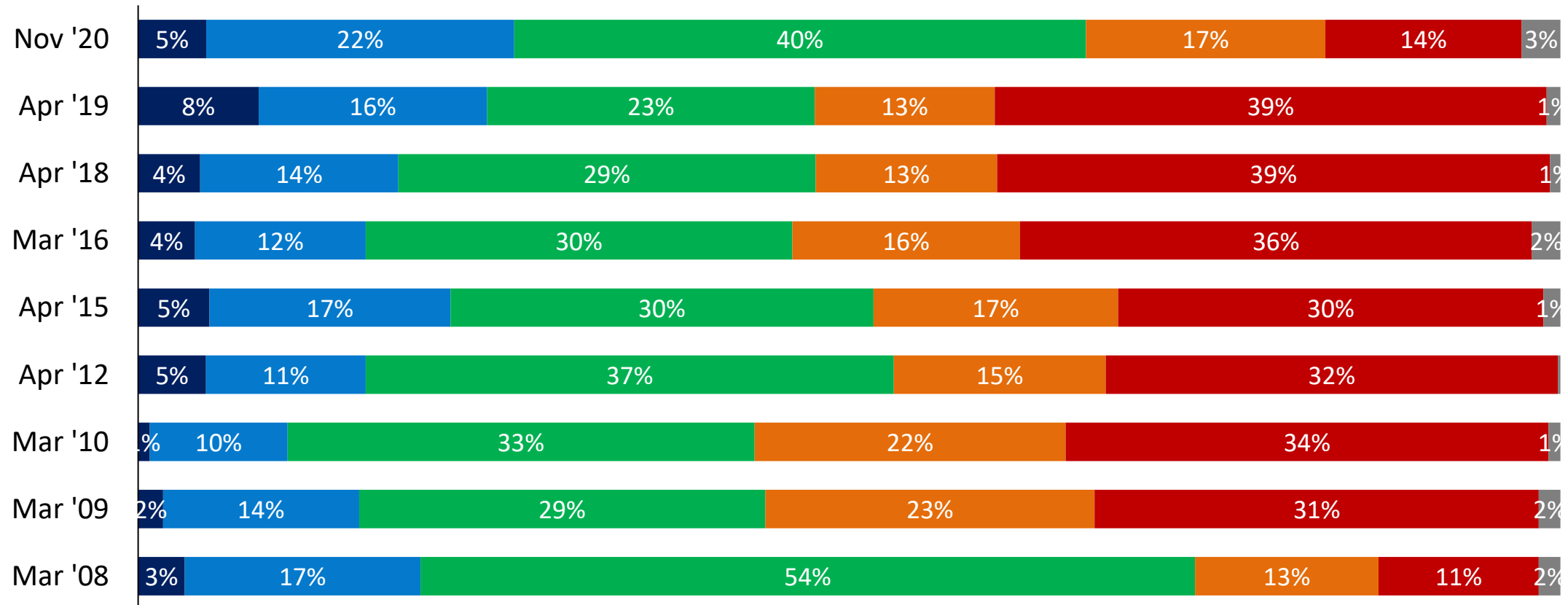


Performance Impact Tracking: The share of respondents who say the budget left them less satisfied is down to 31% from 52% in 2019



What impact did the budget have on your overall assessment of the provincial government's performance? Would you say it left you . . .

[asked of those aware of budget, n=323]



■ Much more satisfied

■ Somewhat more satisfied

■ Makes no difference

■ Somewhat less satisfied

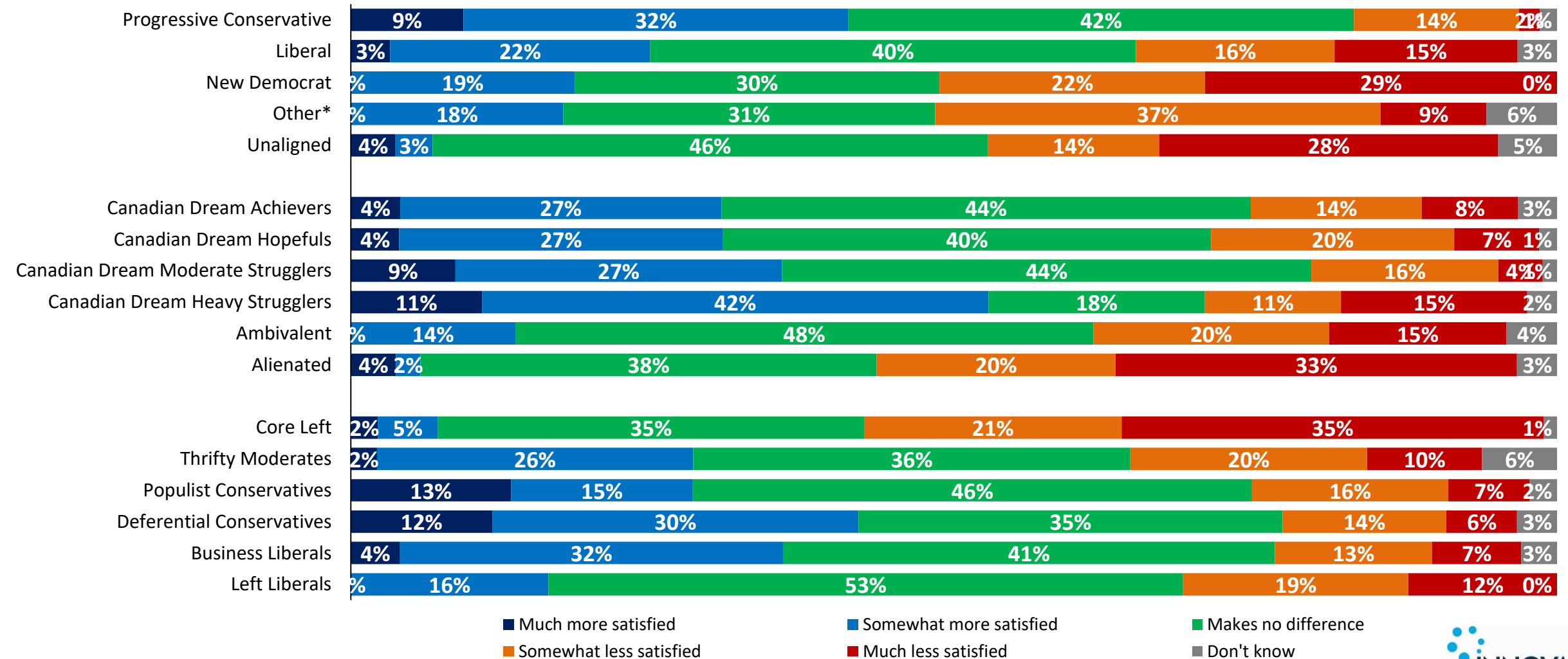
■ Much less satisfied

■ Don't know

Performance Impact by Segment: Core Left and Alienated Ontarians are most likely to say the budget left them less satisfied



What impact did the budget have on your overall assessment of the provincial government's performance? Would you say it left you . . . By SEGMENT
[asked of those aware of budget, n=323]

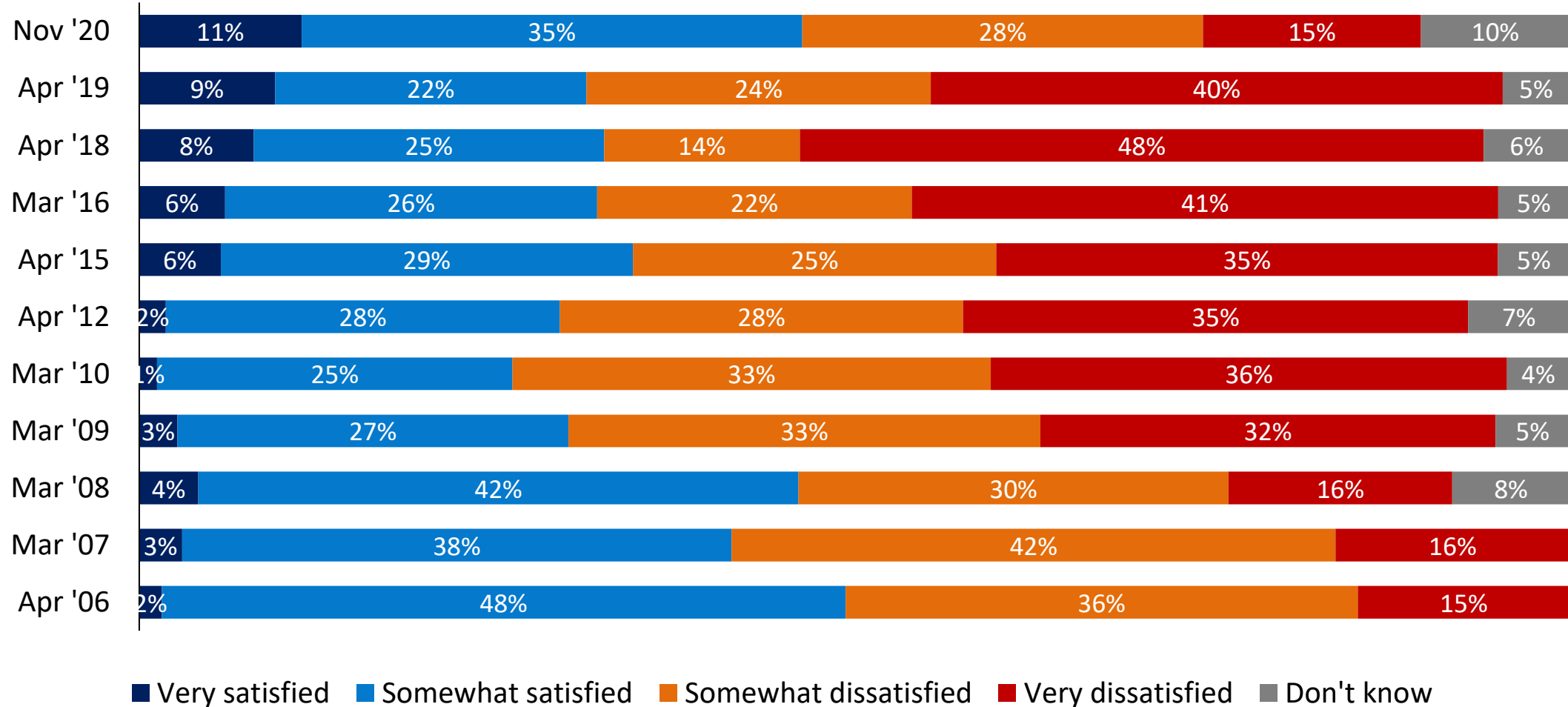


Budget Satisfaction Tracking: Satisfaction with the budget is up significantly since 2019 to 46%



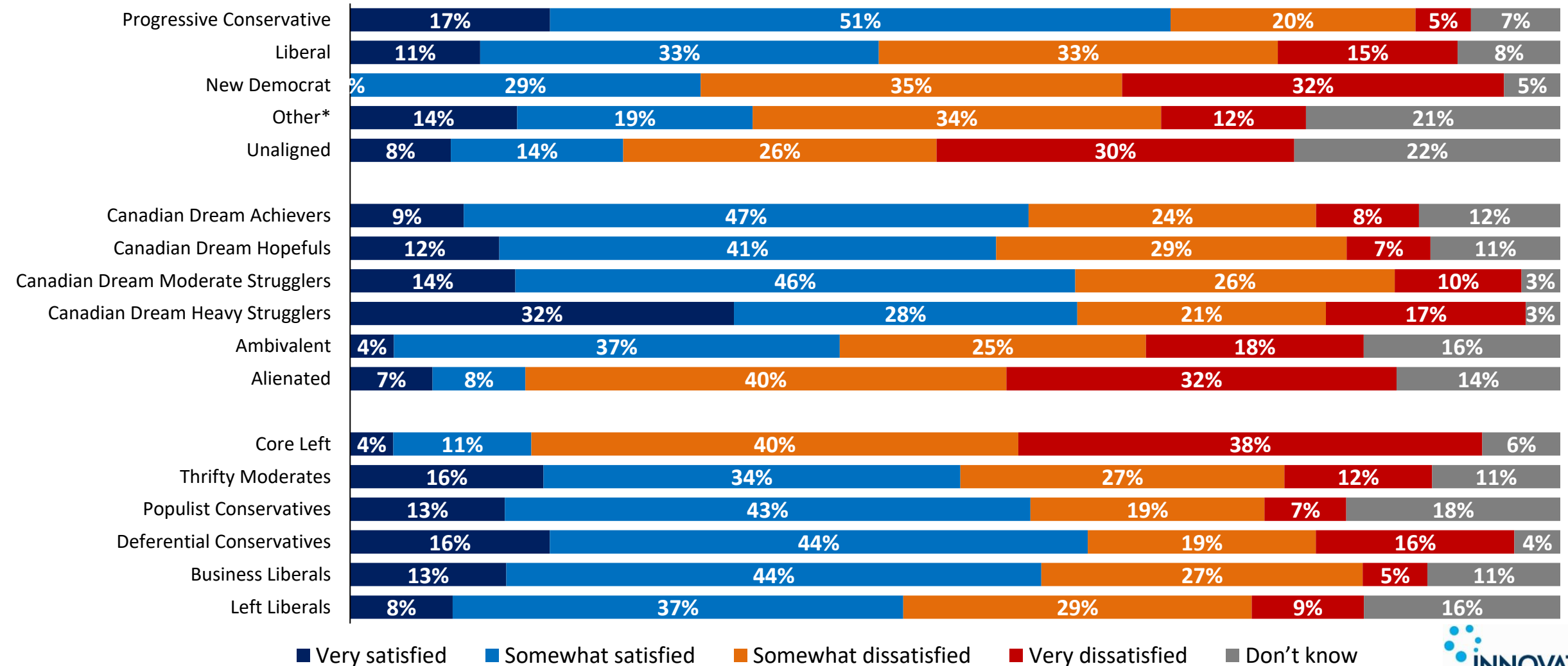
In general, how satisfied are you with the provincial budget?

[asked of those aware of budget, n=323]



Budget Satisfaction by Segment: A majority in most segments are overall satisfied with the budget

Q In general, how satisfied are you with the provincial budget? By SEGMENT
[asked of those aware of budget, n=323]

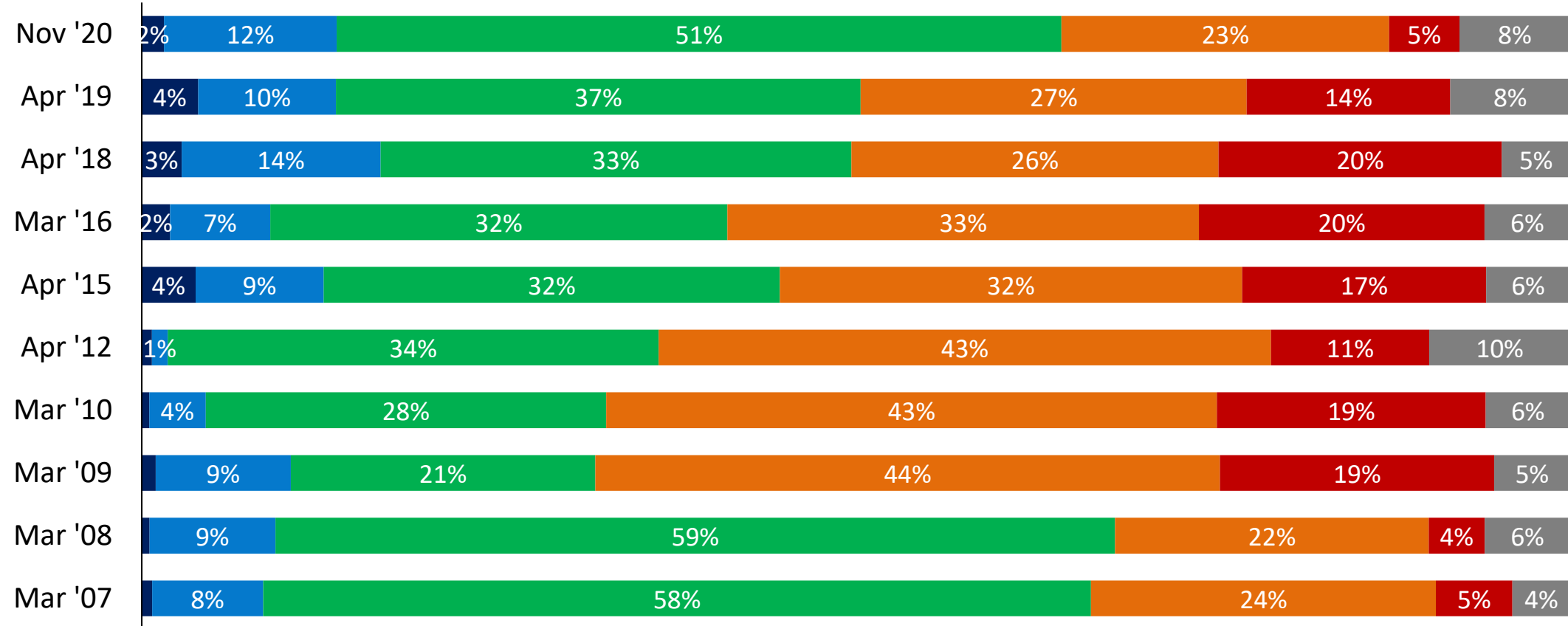


Personal Impact Tracking: The majority (51%) say that the new budget will have no impact on their personal situation



How do you think the new budget will impact your own personal situation?

[asked of those aware of budget, n=323]



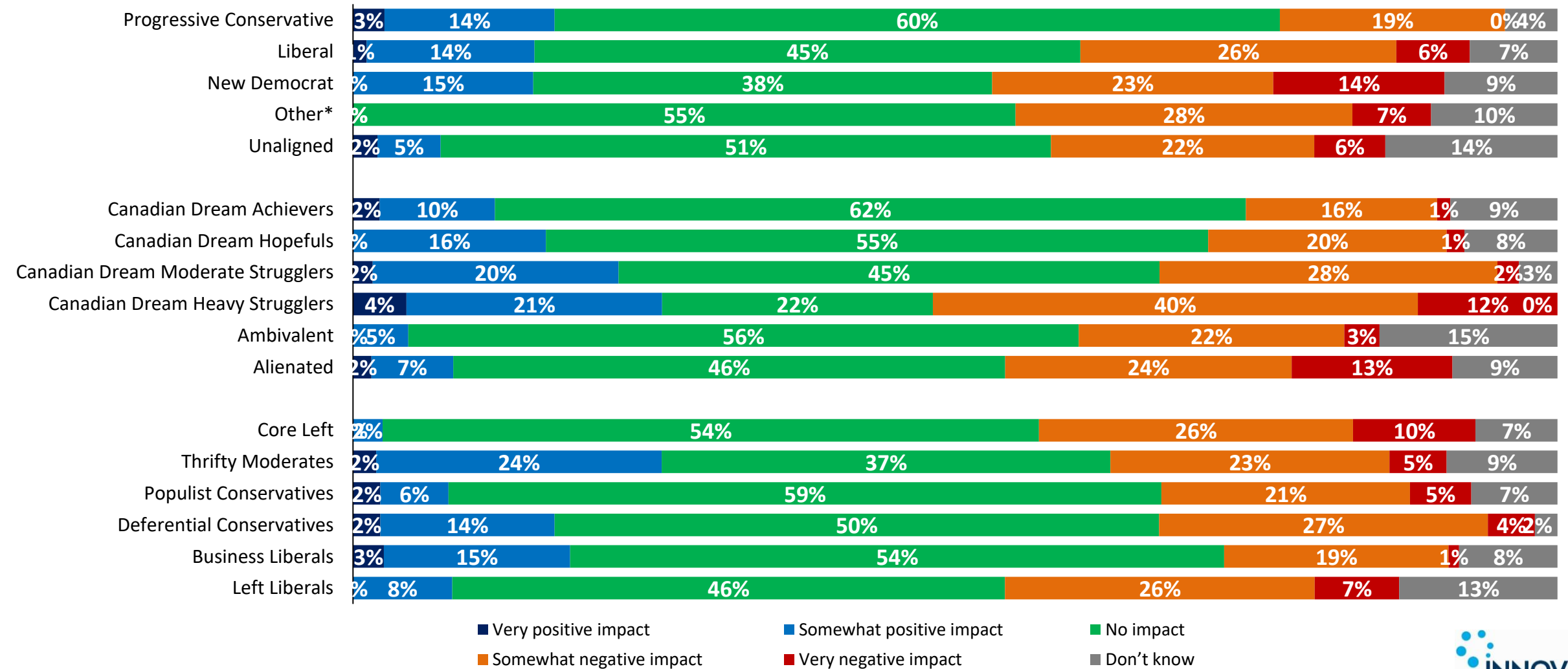
■ Very positive impact
 ■ Somewhat positive
 ■ No impact
 ■ Somewhat negative
 ■ Very negative impact
 ■ Don't know

Personal Impact by Segment: Thrifty Moderates and Heavy Strugglers are most likely to say the budget will have a positive impact on them



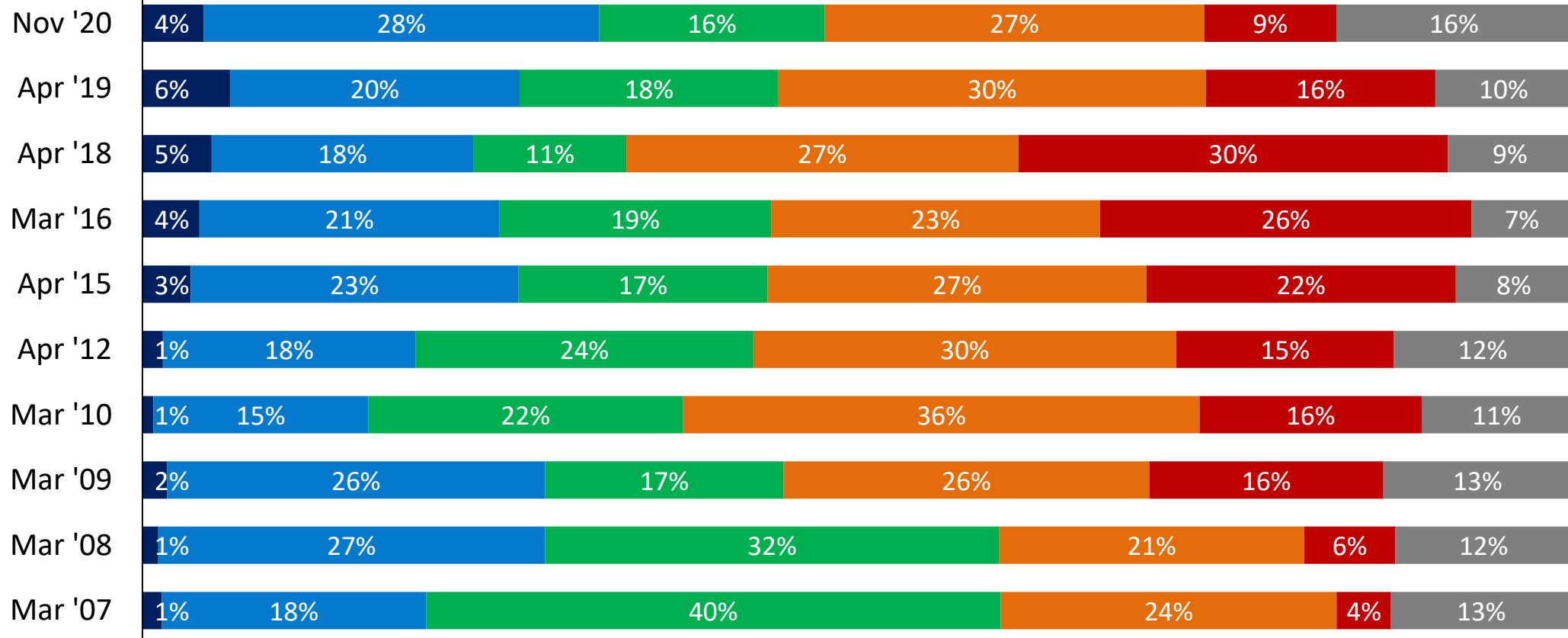
How do you think the new budget will impact your own personal situation? By SEGMENT

[asked of those aware of budget, n=323]



Economy Impact Tracking: Respondents are split on whether the new budget will be positive for the economy (32%) or negative (36%)

Q Do you think the budget will have a positive or negative impact on the economy?
[asked of those aware of budget, n=323]



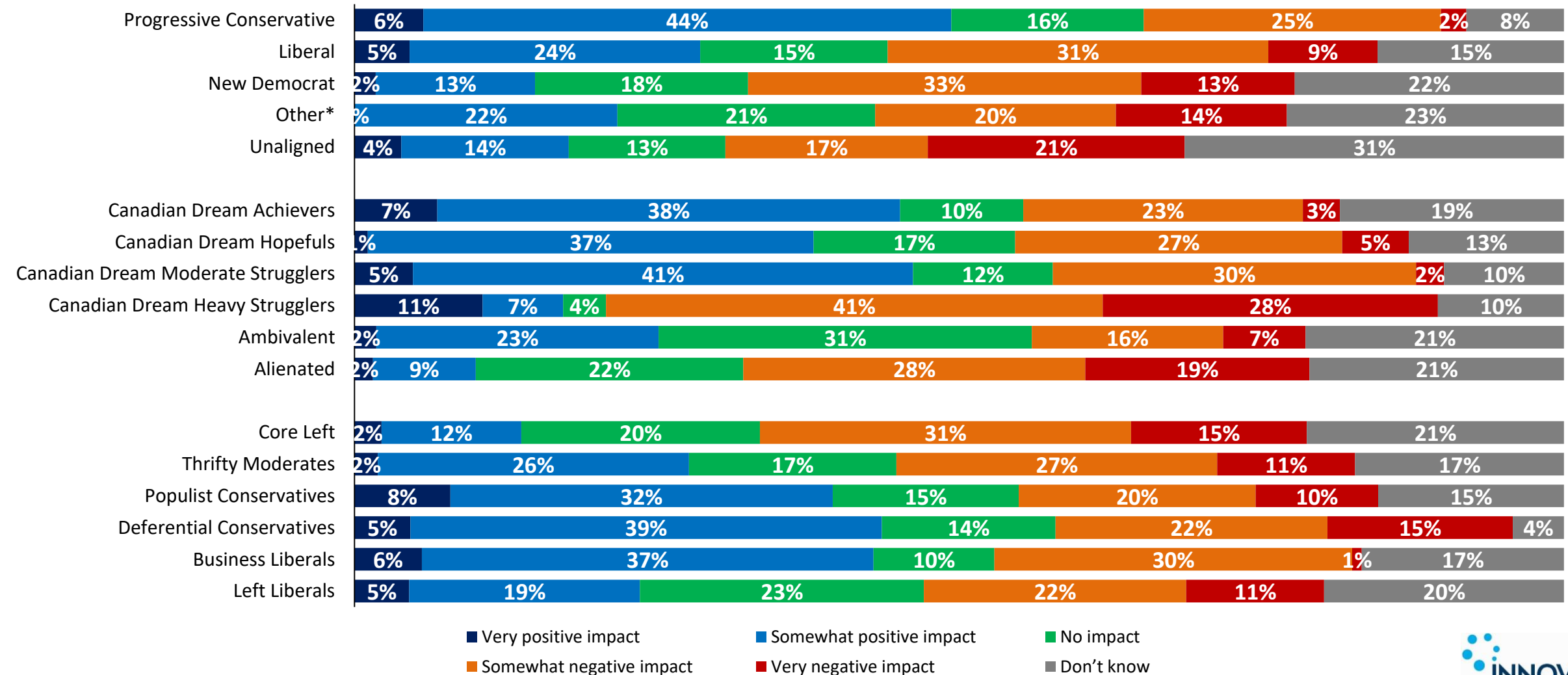
■ Very positive impact
 ■ Somewhat positive
 ■ No impact
 ■ Somewhat negative
 ■ Very negative impact
 ■ Don't know

Economy Impact by Segment: Progressive Conservatives are most likely to say the budget will have a positive impact on the economy



Do you think the budget will have a positive or negative impact on the economy? By SEGMENT

[asked of those aware of budget, n=323]

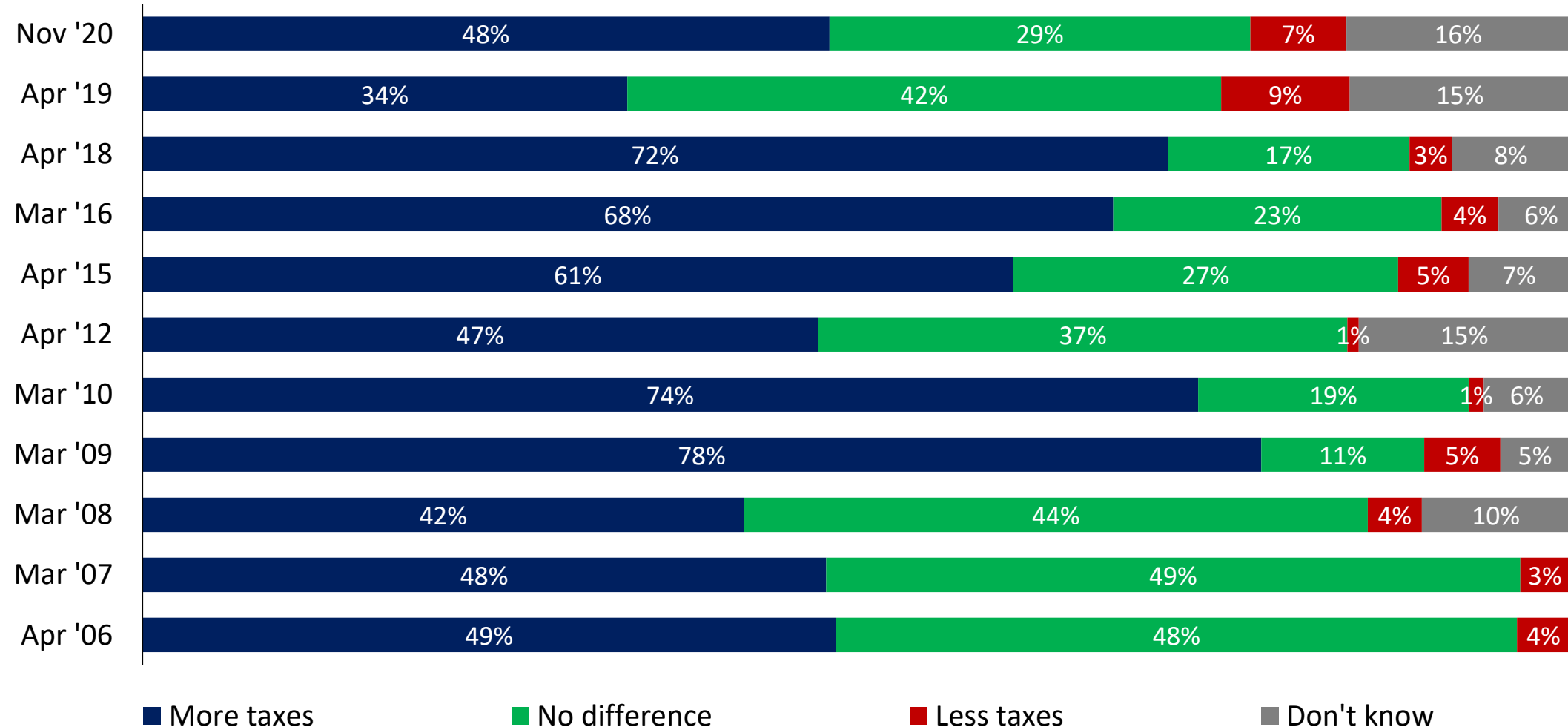


Tax Impact Tracking: Nearly half (48%) think the current budget will result in more taxes while only 7% say less taxes



Do you think the budget will result in you paying more taxes, less taxes, or it will make no difference?

[asked of those aware of budget, n=323]

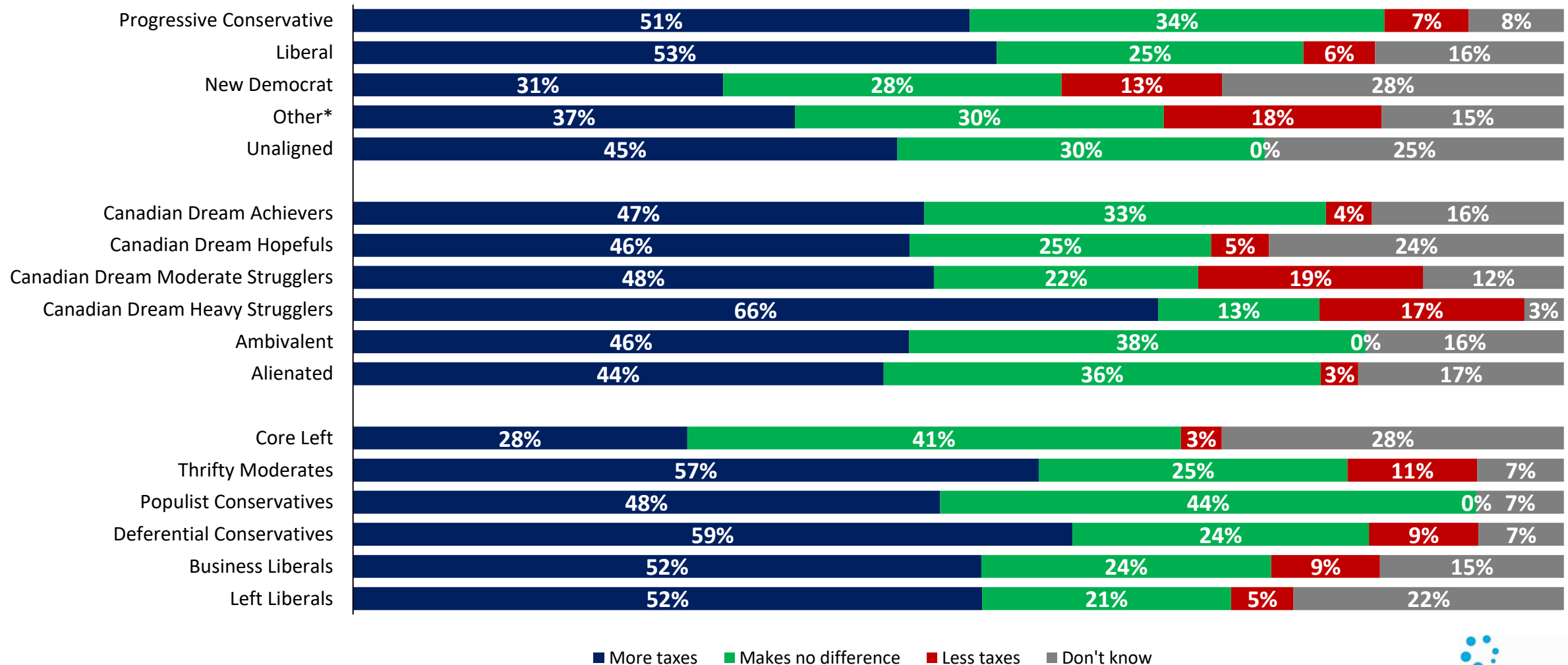


Tax Impact by Segment: A majority of both Progressive Conservatives and Liberals say the budget will result in more taxes



Do you think the budget will result in you paying more taxes, less taxes, or it will make no difference? By SEGMENT

[asked of those aware of budget, n=323]

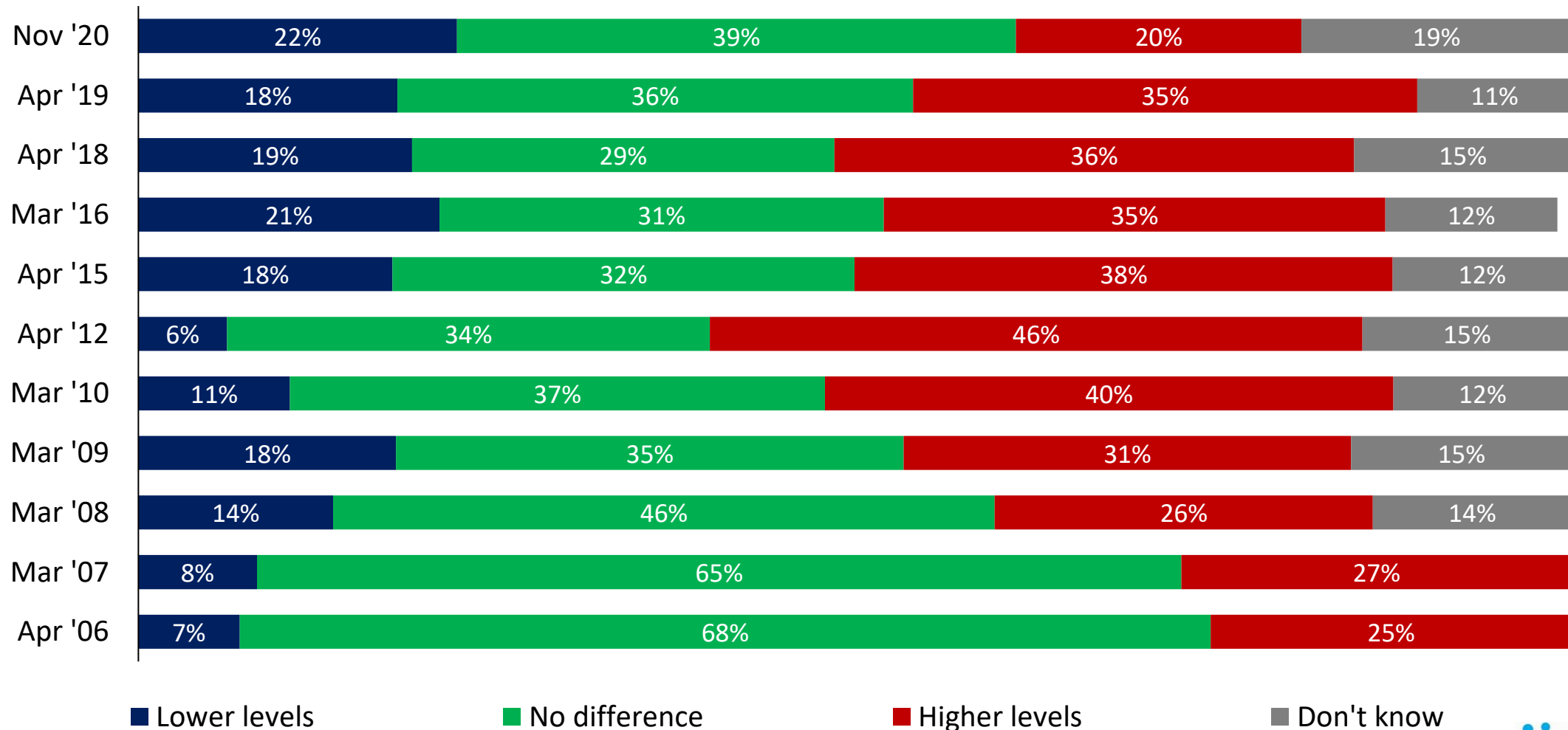


Job Impact Tracking: The plurality of respondents (39%) say that the budget will make no difference to unemployment



Do you think the budget will result in higher levels of unemployment, lower levels of unemployment or will it make no difference?

[asked of those aware of budget, n=323]



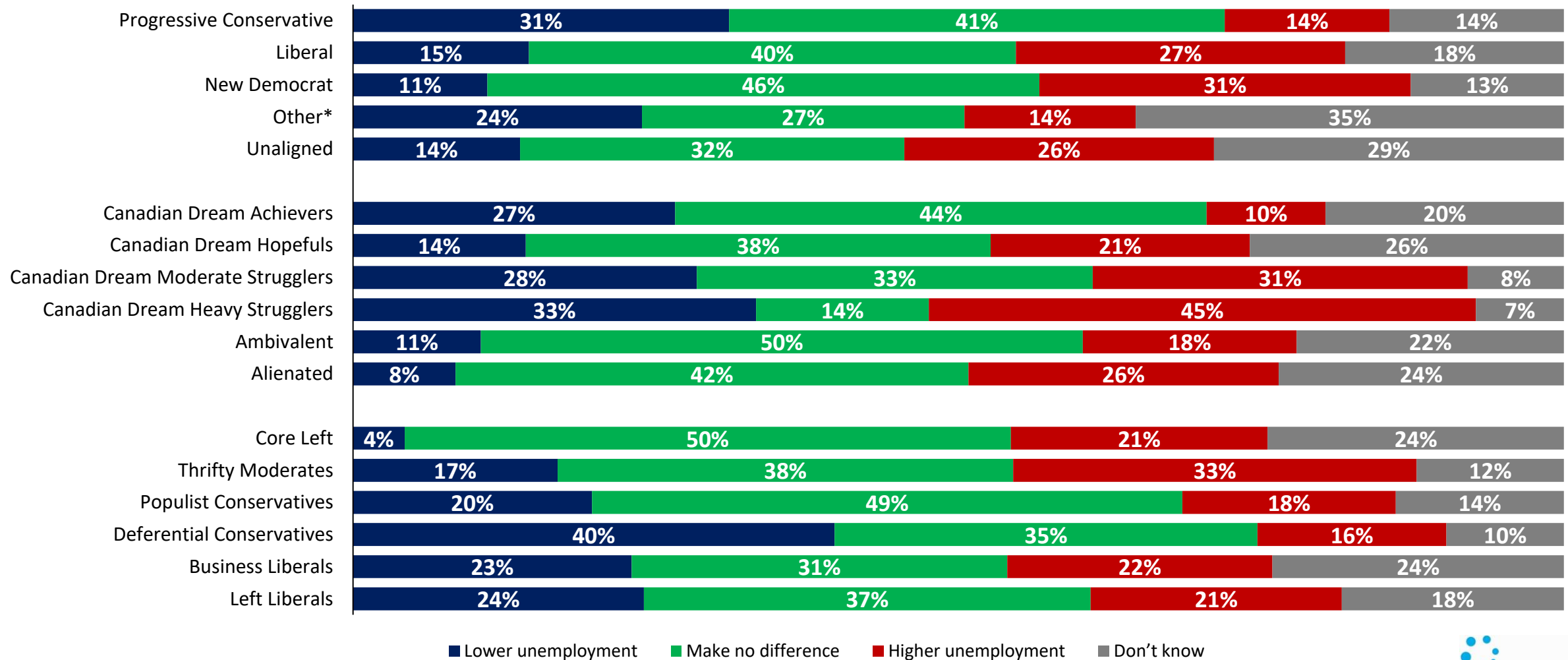
Note: "Don't know" is not provided as an option in Apr '07 and Apr '06.

Job Impact by Segment: Four-in-ten Deferential Conservatives think the budget will lower unemployment



Do you think the budget will result in higher levels of unemployment, lower levels of unemployment or will it make no difference? By SEGMENT

[asked of those aware of budget, n=323]

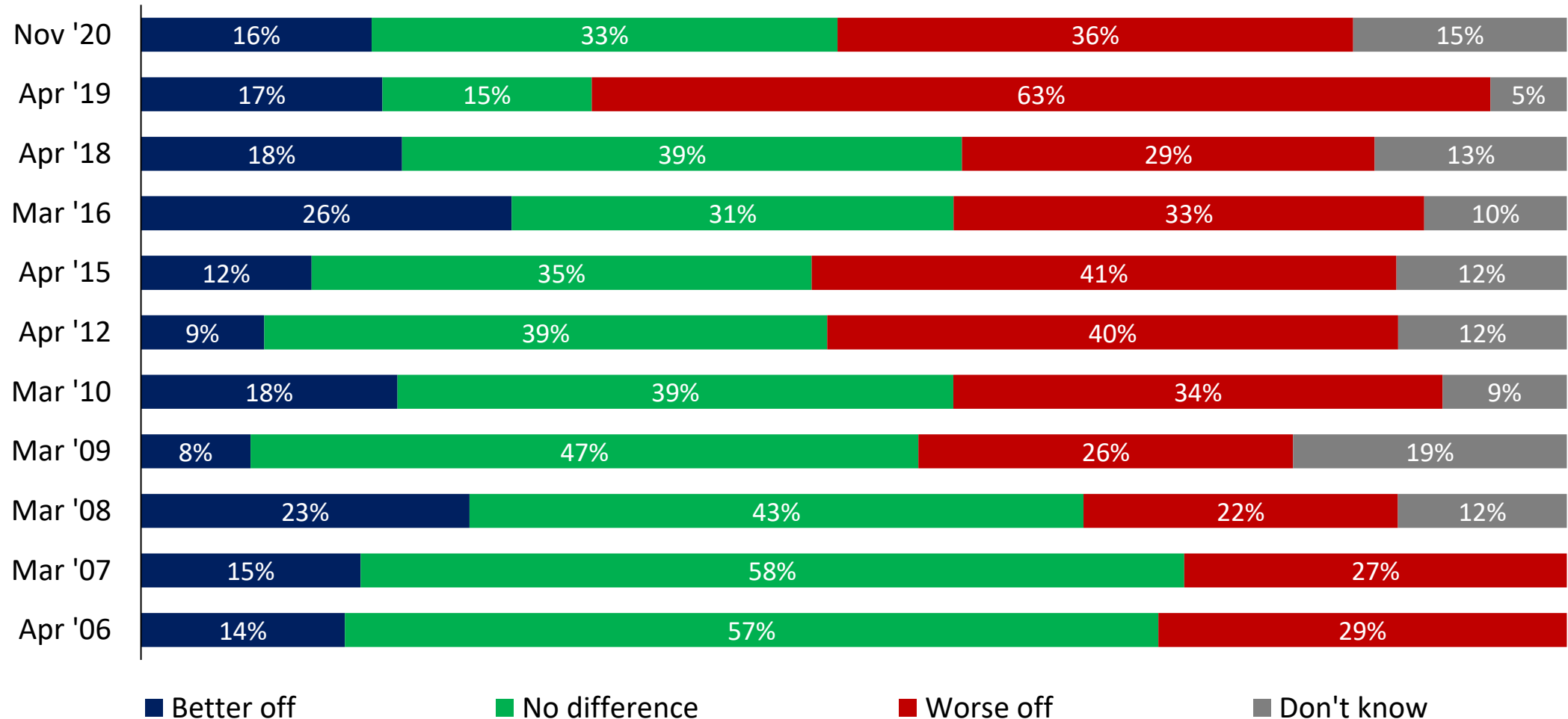


Education Impact Tracking: One-in-three (36%) say the budget will have²⁷ a negative impact on education, down significantly from 63% last year



Do you think the budget will leave your province's education system better off, worse off or will it make no difference?

[asked of those aware of budget, n=323]

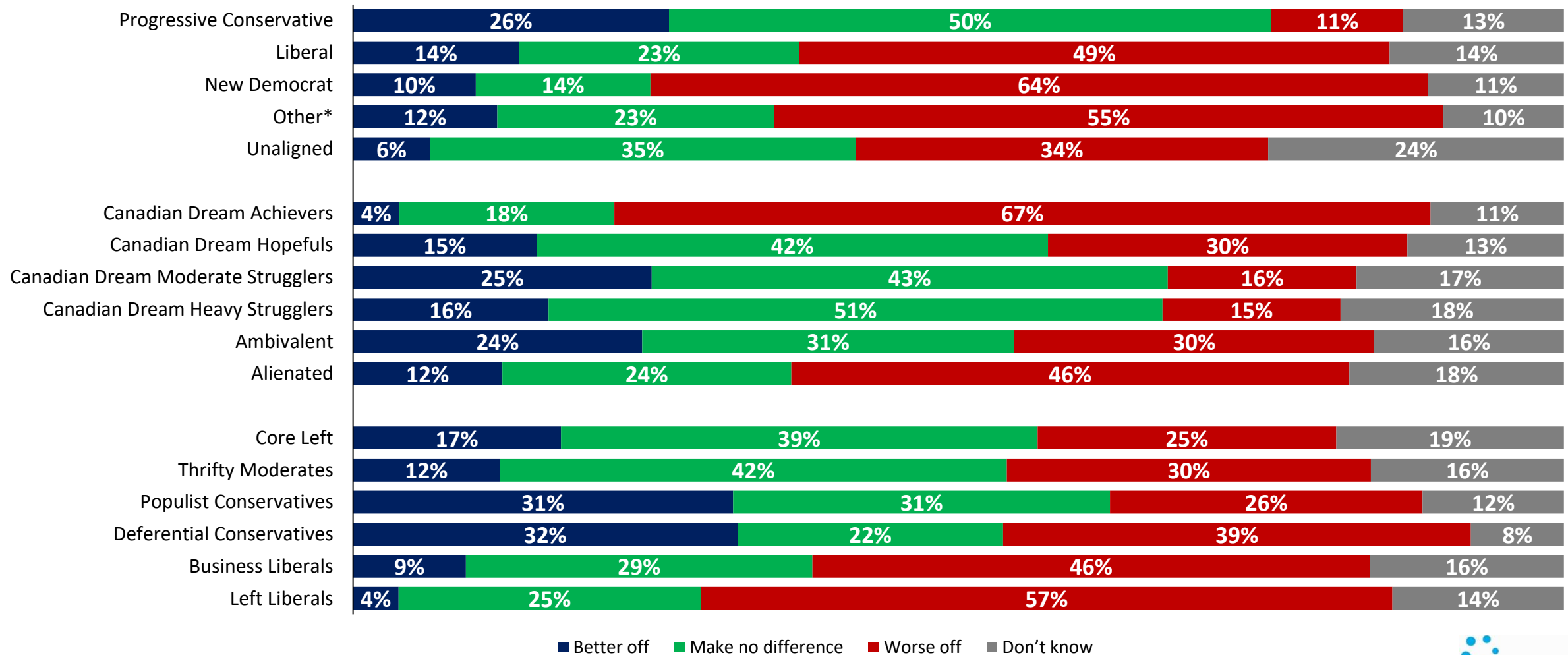


Education Impact by Segment: Unaligned voters are split on if the budget will make no difference (35%) or leave education worse off (34%)



Do you think the budget will leave your province's education system better off, worse off or will it make no difference? By SEGMENT

[asked of those aware of budget, n=323]

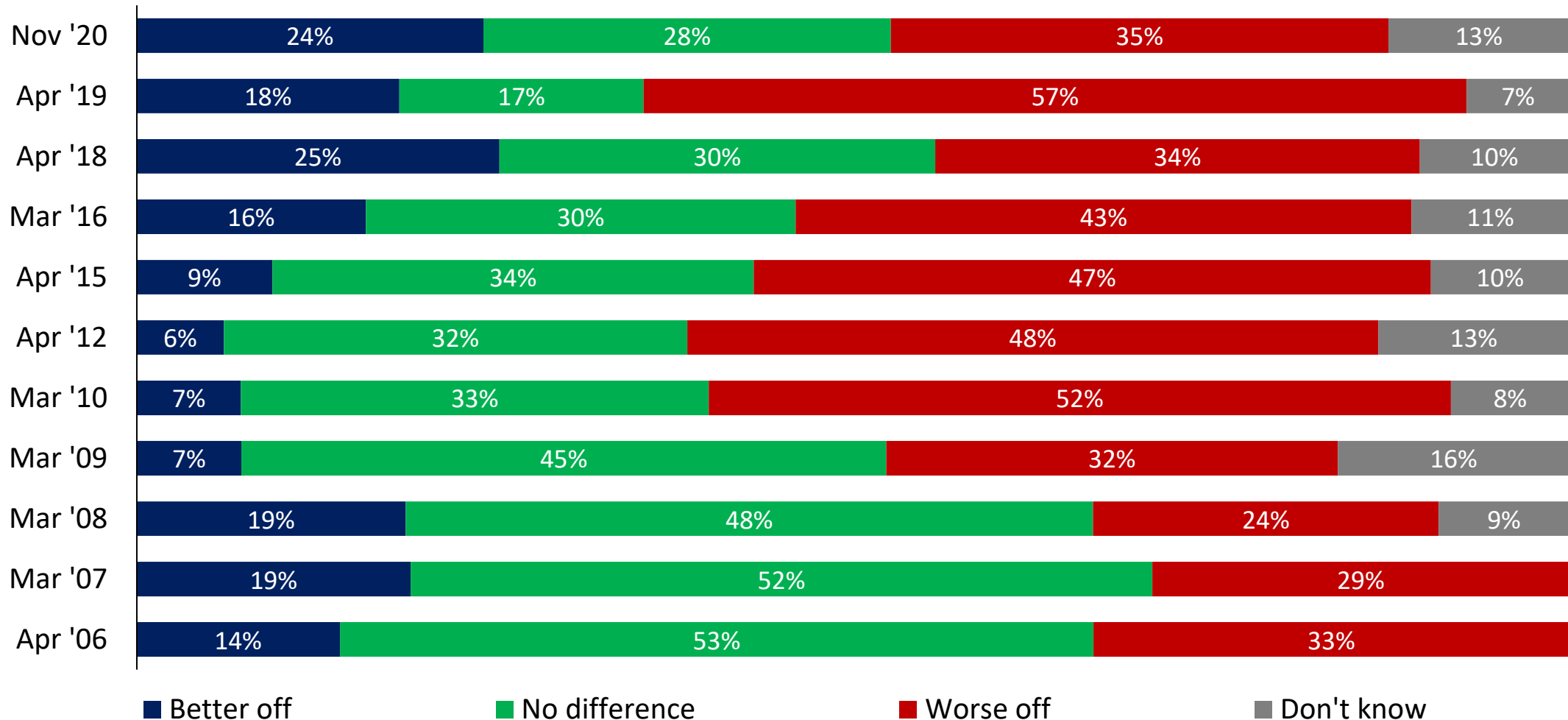


Health Care Impact Tracking: The share of Ontarians who think the budget will leave health care worse off is down from 57% to 35%



Do you think the budget will leave your province's health care system better off, worse off or will it make no difference?

[asked of those aware of budget, n=323]



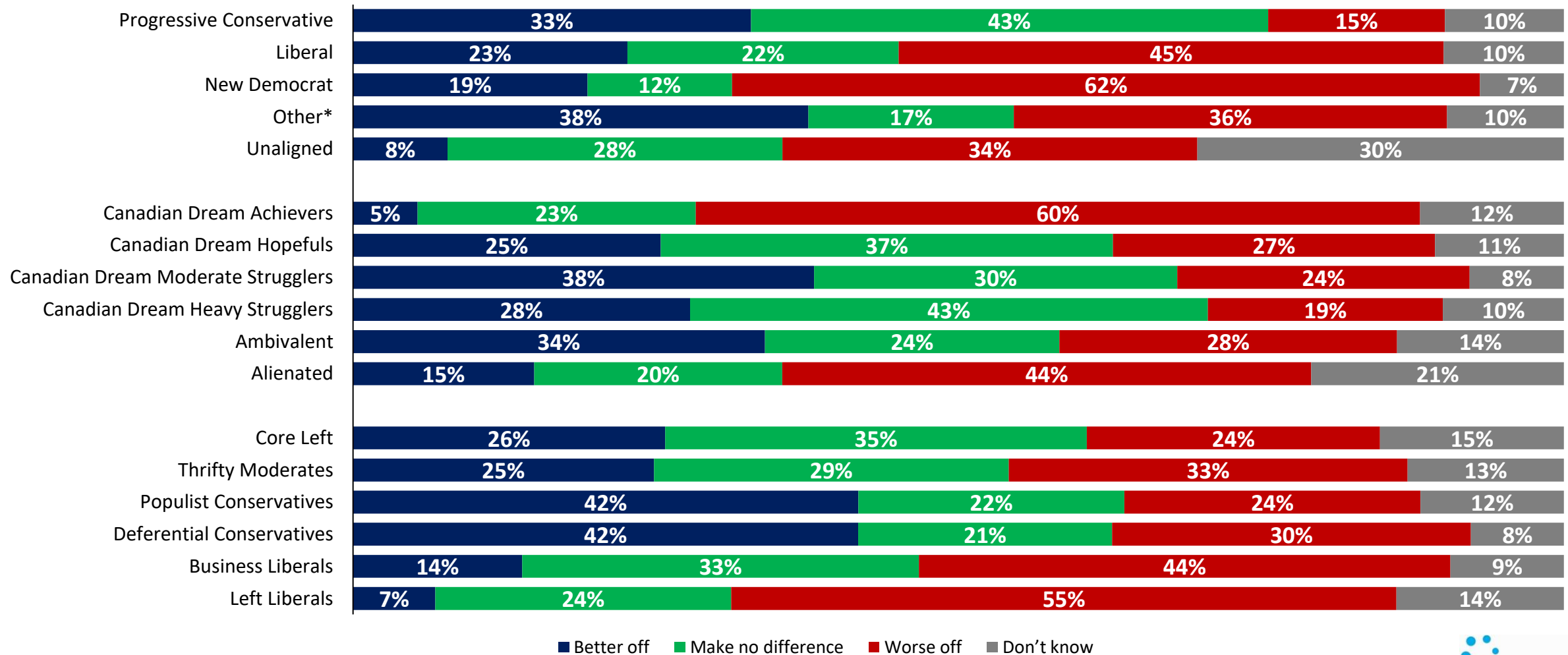
Note: "Don't know" is not provided as an option in Apr '07 and Apr '06.

Health Care Impact by Segment: Both Differential and Populist Conservatives are most likely to say the budget will help health care



Do you think the budget will leave your province's health care system better off, worse off or will it make no difference? By SEGMENT

[asked of those aware of budget, n=323]

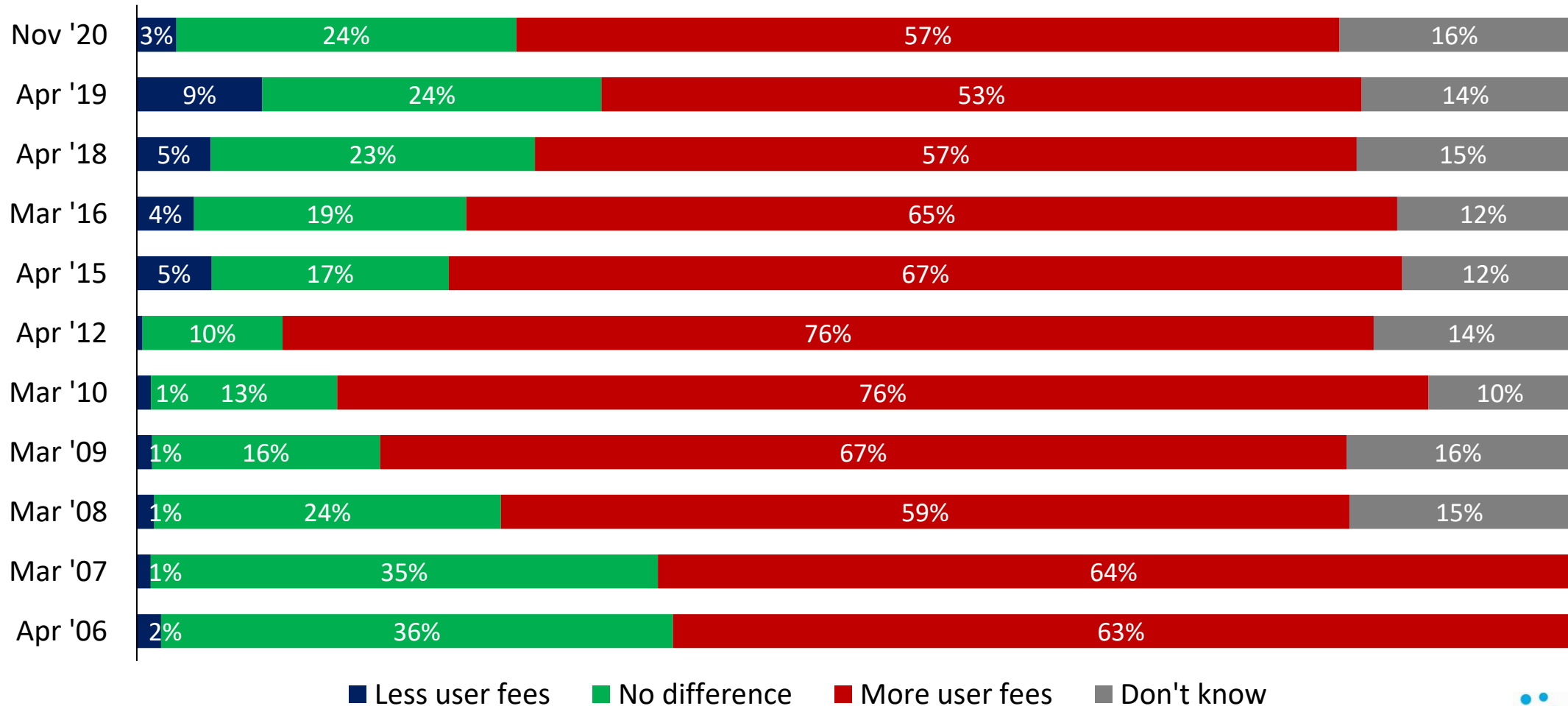


User Fee Tracking: The majority of respondents (57%) say the budget will leave them paying more user fees for government services



Do you think the budget will result in you paying more user fees for government services, less user fees for government services, or will it make no difference?

[asked of those aware of budget, n=323]

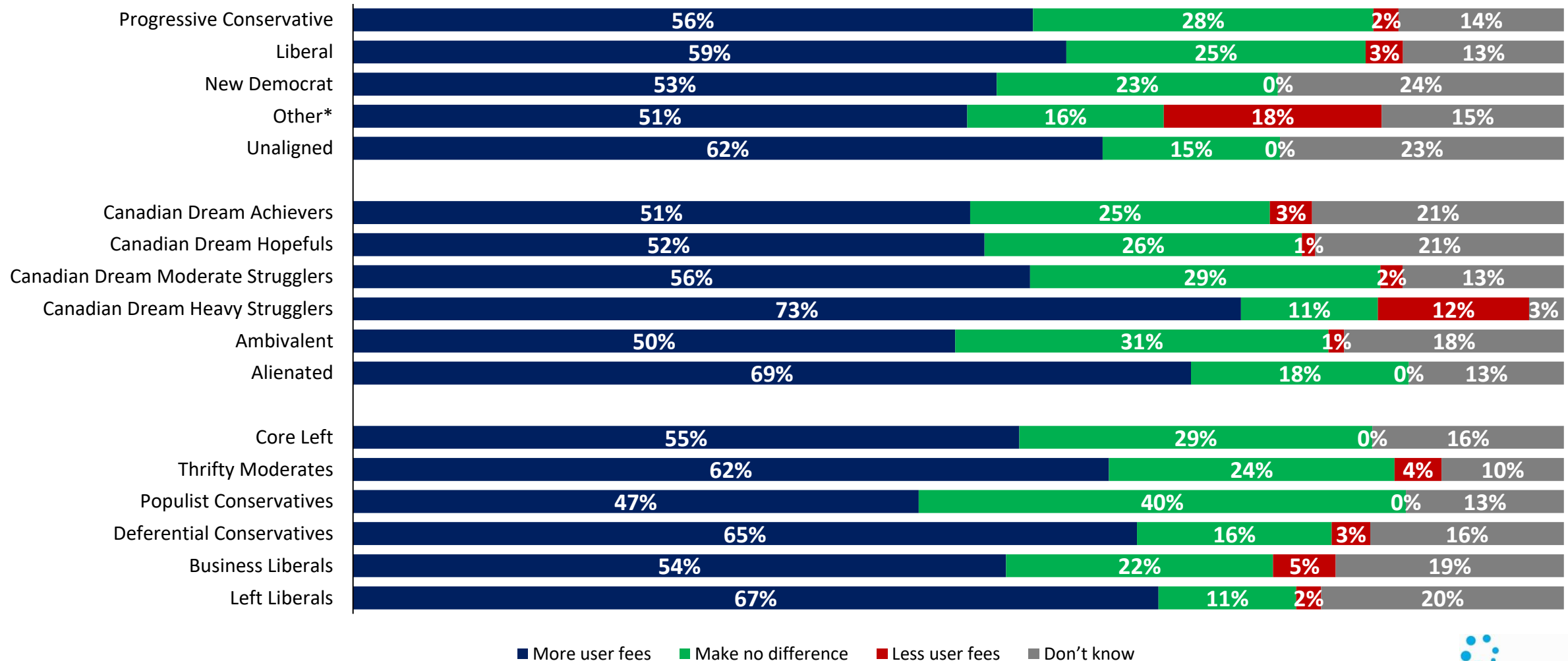


User Fee by Segment: A majority of every segment except Populist Conservatives say the budget will result in more user fees



Do you think the budget will result in you paying more user fees for government services, less user fees for government services, or will it make no difference? By SEGMENT

[asked of those aware of budget, n=323]

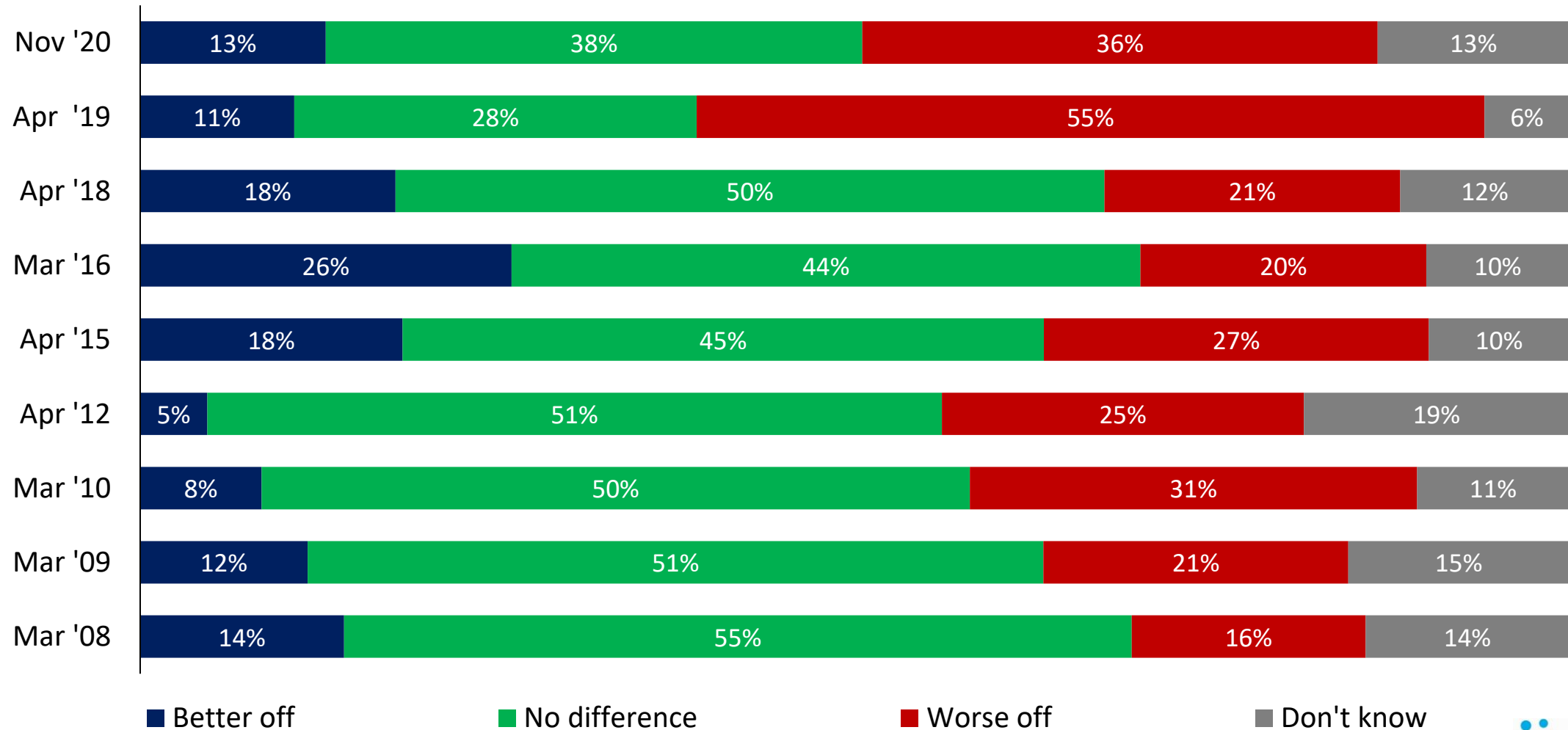


Environment Impact Tracking: The plurality say the budget will either make no difference (38%) or leave the environment worse off (36%)



Do you think the budget will leave the environment in your province better off, worse off, or will it make no difference?

[asked of those aware of budget, n=323]

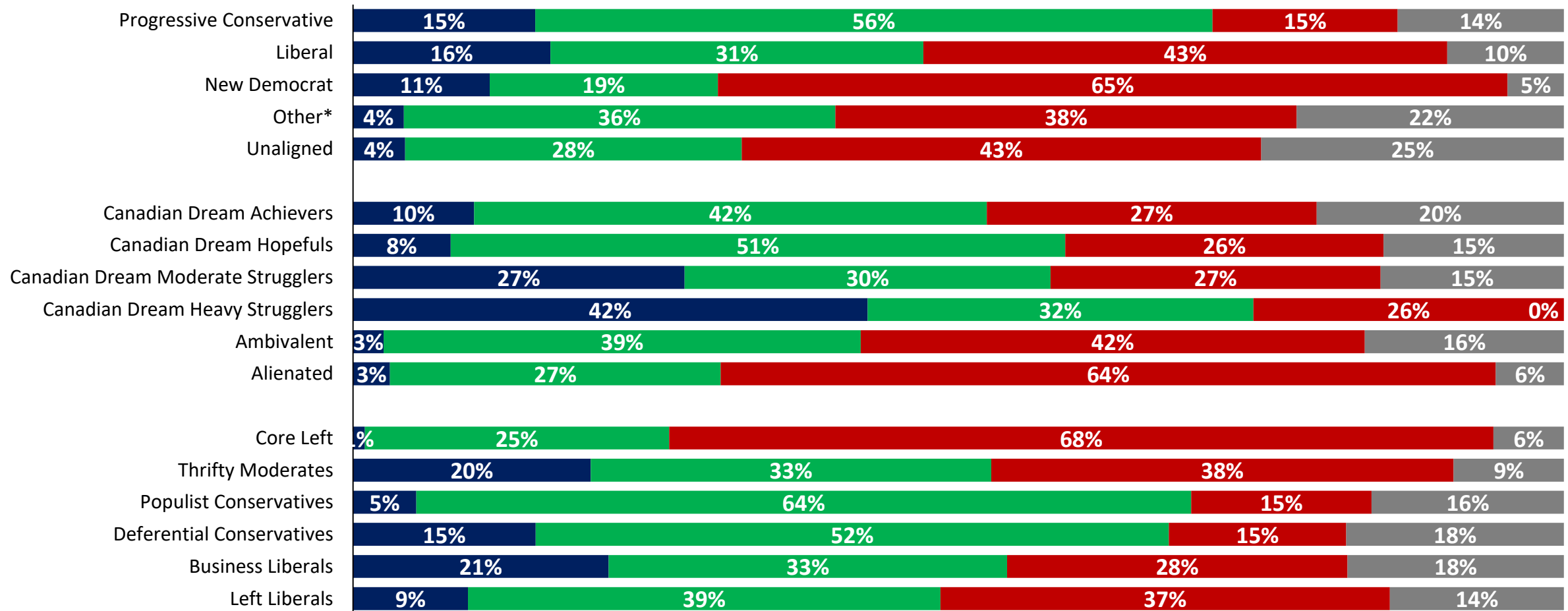


Environment Impact by Segment: Dream Heavy Strugglers are the only group where a plurality say the budget will be good for the environment



Do you think the budget will leave the environment in your province better off, worse off, or will it make no difference? By SEGMENT

[asked of those aware of budget, n=323]



■ Better off ■ Make no difference ■ Worse off ■ Don't know

Methodology



Survey Methodology

These are the results of an online survey conducted between November 5th and 18th, 2020.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, 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 Ontario population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=1,266 Ontario citizens, 18 years or older. Regional oversamples in Alberta and BC were used in order to adequately capture perspective on those provinces. The results are nationally weighted to n=1,200 based on Census data from Statistics Canada.

Field Dates: November 5th to 18th, 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	121	9.6%	166	13.8%
Men 35-54	216	17.1%	200	16.6%
Men 55+	266	21.0%	212	17.7%
Women 18-34	138	10.9%	165	13.8%
Women 35-54	230	18.2%	214	17.8%
Women 55+	295	23.3%	243	20.3%
Toronto	344	27.2%	251	20.9%
Rest of GTA	297	23.5%	312	26.0%
South/West	291	23.0%	310	25.8%
North/East	334	26.4%	327	27.3%



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Building Understanding.