

2026 Ontario Energy Conference **Navigating Ontario's Electricity Challenges**

October 13, 2026

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Presentation Overview

Study Overview



This report draw on National and Ontario tracking data.
It examines:

- Public response to tariffs, Trump and project fast-tracking
- Ontario political attitudes and government performance
- Satisfaction with how the electricity system is managed
- Views on affordability, supply and the need for grid expansion
- Willingness to pay more for electricity investment
- Perceptions of electricity companies and customer experience
- How trust and perceived value shape willingness to pay

Sample Overview: Report findings from national and Ontario online surveys fielded in Sept. and Oct. 2026

Each data slide footnote identifies its survey wave; questions fielded in different waves may use different sample bases.

National • September W1–2



Sep. 4 – Sep. 15, 2026

Sample **n=2,010**

Weighted **n=1,000**

Coverage **Canada**

Canada 20/20 national panel + Lucid

Ontario • October W1



Oct. 2 – Oct. 6, 2026

Sample **n=641**

Weighted **n=600**

Coverage **Ontario**

Canada 20/20 Ontario panel + Dynata

Key Segmentation (for Ontario): We use underlying attitudes clusters to⁶ explore opinions within groups that share common motivations

Political Value Clusters

We group Ontarians into six groups based on 4 key political values:

1. **Populist Conservatives** (12%) - Believe government should listen to common sense, not experts, and trust the profit system.
2. **Deferential Conservatives** (12%) - Support government decisions based on affordability and trust expert guidance over public opinion.
3. **Business Liberals** (23%) - Champion equal opportunity and public need, favoring expertise in policy decisions.
4. **Left Liberals** (19%) - Balance equal opportunity with wealth redistribution while respecting both experts and common sense.
5. **Core Left** (14%) - Believe the profit system brings out the worst in people and government should redistribute wealth
6. **Pay-as-you-go Moderates** (20%) - Want government spending based on affordability but support creating equal opportunity.

Economic Gap Clusters

The economic gap segmentation divides Ontarians by their outlook on their economic future, splitting them into four groups:

1. **Canadian Dream Achievers** (24%) - Optimistic Canadians who believe hard work still leads to success.
2. **Canadian Dream Strugglers** (26%) - Believe in the dream but find it increasingly difficult to get ahead.
3. **Ambivalent** (27%) - Uncertain about whether opportunity exists or if hard work pays off anymore.
4. **Alienated** (23%) - Don't believe in the Canadian Dream and feel the system doesn't work

Provincial Party ID

We group Ontarians into six groups based on their self-identifying with one of the following:

1. **Conservative** (37%)
2. **Liberal** (30%)
3. **NDP** (9%)
4. **Green** (3%)
5. **Other** (2%)
6. **Unaligned** (19%)



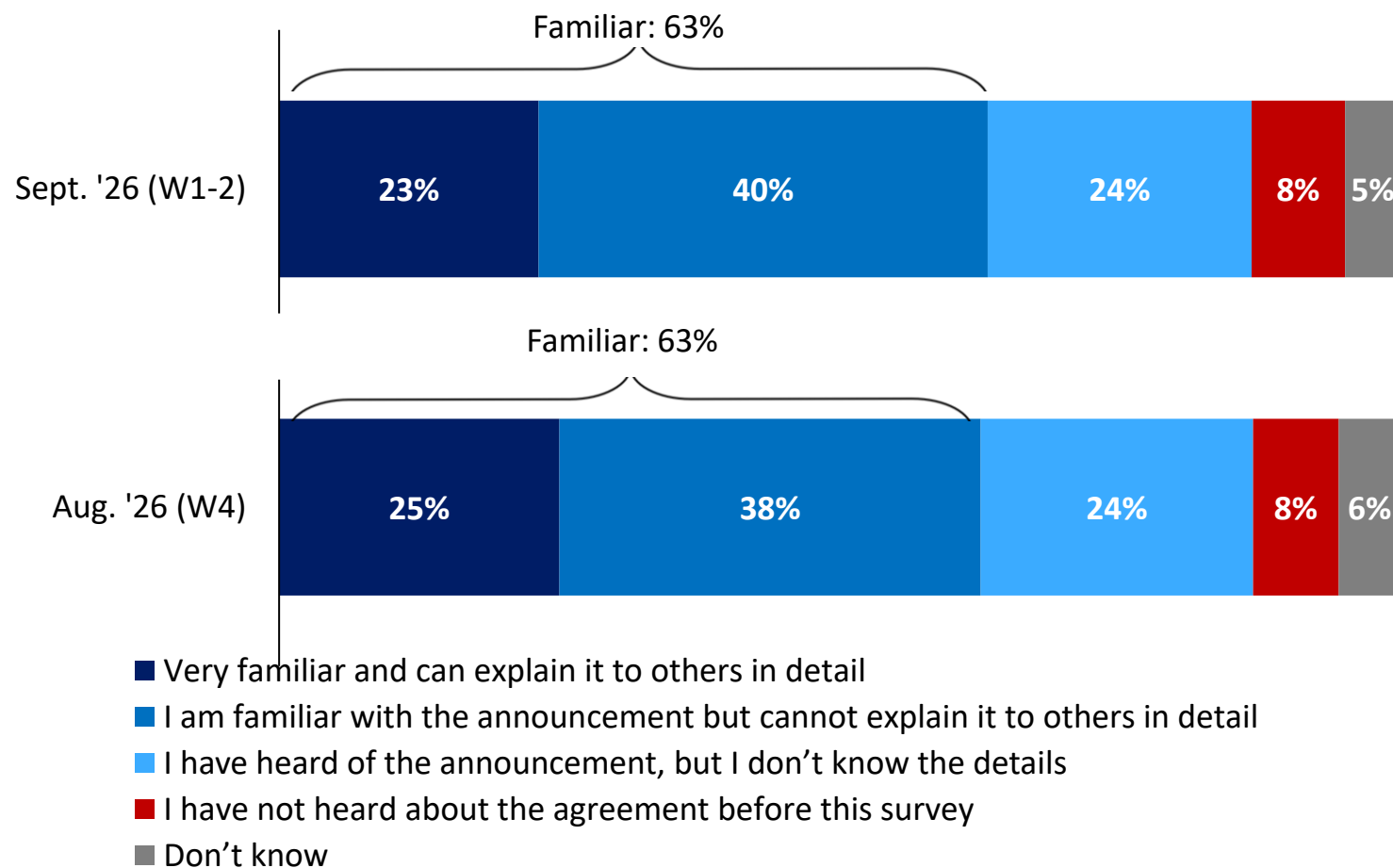
Tariffs and the Carney Moment

The Tariffs Dispute Has Sustained Canadians' Attention



How familiar are you with the August 21st, 2026 announcement by Prime Minister Mark Carney that Canada was suspending trade negotiations with the U.S. and would match new U.S. tariffs on Canadian goods?

[asked of all respondents; Sep. '26 n=1,000]



Segmentation Those who say 'Familiar'

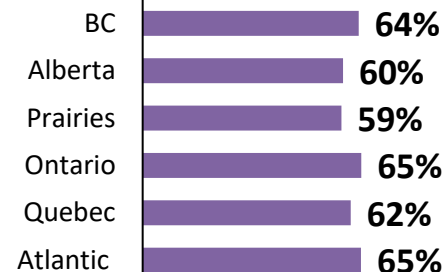
Gender



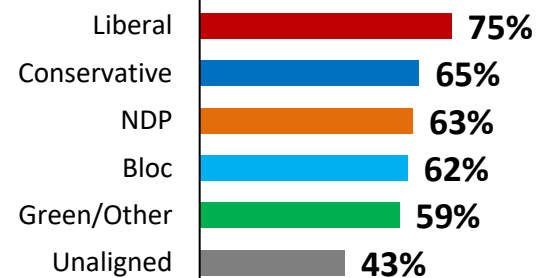
Age



Region



Party ID



Canadians' Support for 'Dollar-for-dollar' Tariffs

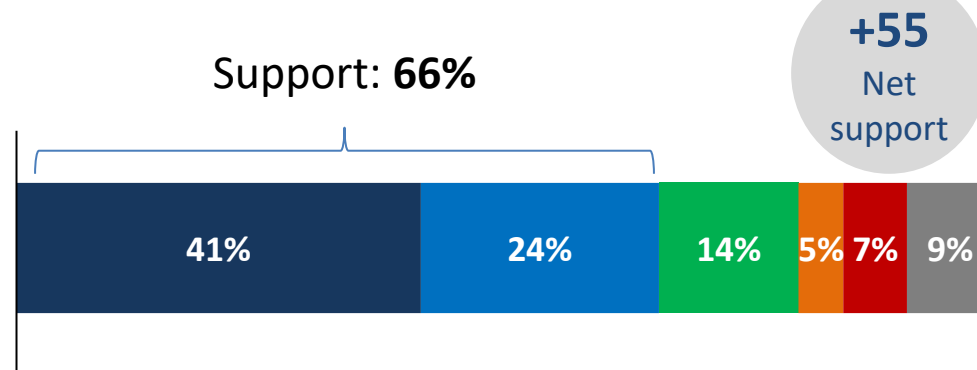


Do you support or oppose Canada imposing dollar-for-dollar retaliatory tariffs on American goods?
[asked of all respondents; n=1,200]

Support for dollar-for-dollar retaliatory tariffs

The federal government has announced that Canada will impose dollar-for-dollar retaliatory tariffs on imports from the U.S. beginning September 8, in response to the latest U.S. tariffs on Canadian goods.

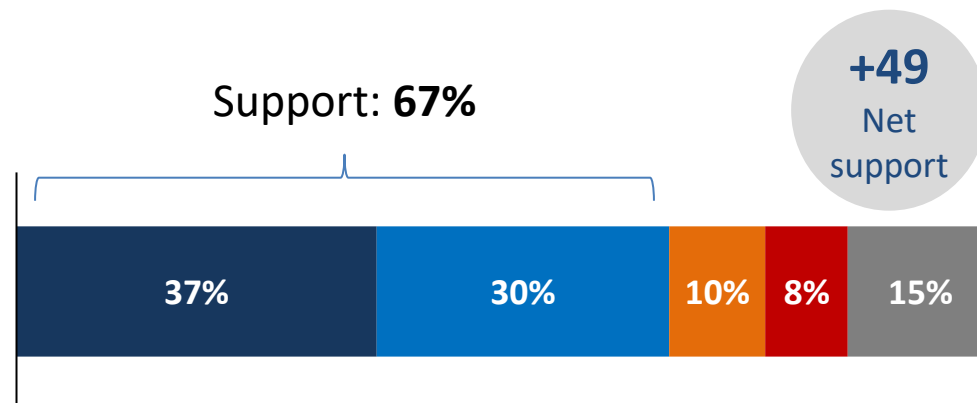
Sep. '26 (W1-2)



Support for dollar-for-dollar retaliatory tariffs

On August 21st, Prime Minister Mark Carney announced that Canada was suspending trade negotiations with the U.S. and recalling its negotiation team to Ottawa. This announcement came as the U.S. was preparing to impose new 50% tariffs on roughly \$28 billion worth of Canadian goods. Carney also announced that Canada would match the new U.S. tariffs 'dollar for dollar'

Aug. '26 (W4)



■ Strongly support

■ Neither support nor oppose

■ Somewhat support

■ Somewhat oppose

Segmentation

Those who say 'Support'

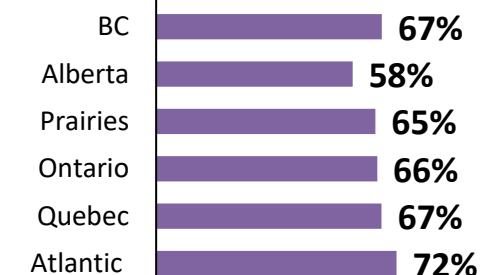
Gender



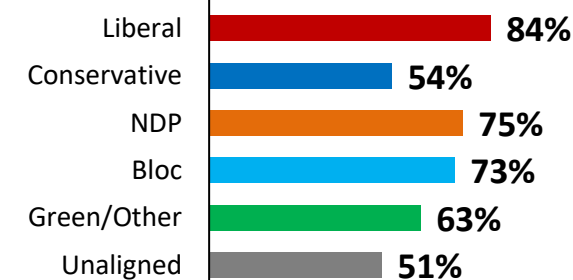
Age



Region



Party ID

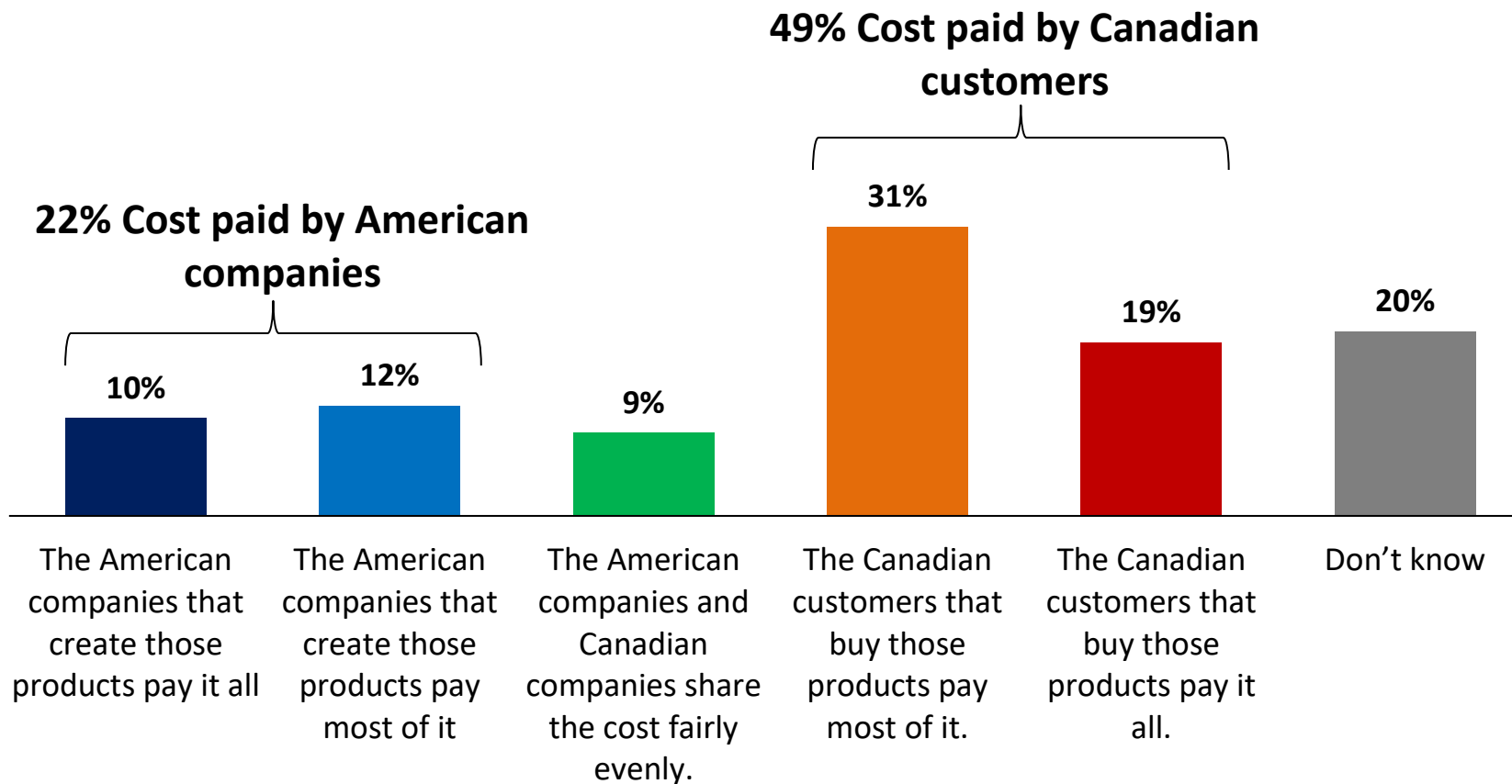


Canadians Generally Understand the Cost of Tariffs



When the Canadian government places tariffs on goods importing from the U.S. to Canada, who pays those tariffs?

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

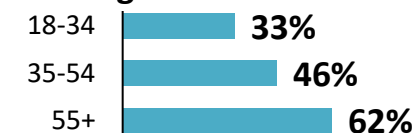


Segmentation
Those who say
'Cost paid by Canadian customers'

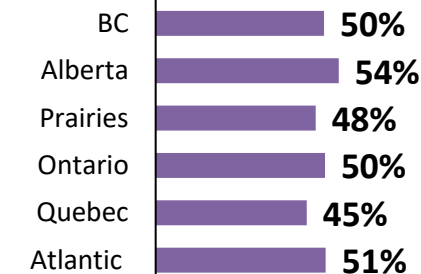
Gender



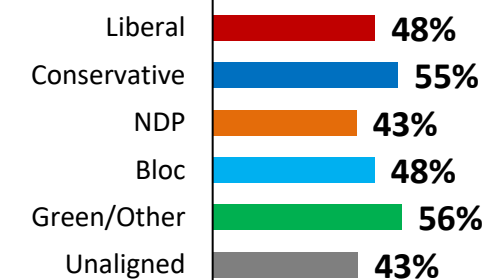
Age



Region



Party ID



*Preamble for the question: 'On August 21st, Prime Minister Mark Carney announced that Canada was suspending trade negotiations with the U.S. and recalling its negotiation team to Ottawa. This announcement came as the U.S. was preparing to impose new 50% tariffs on roughly \$28 billion worth of Canadian goods. Carney also announced that Canada would match the new U.S. tariffs 'dollar for dollar'.

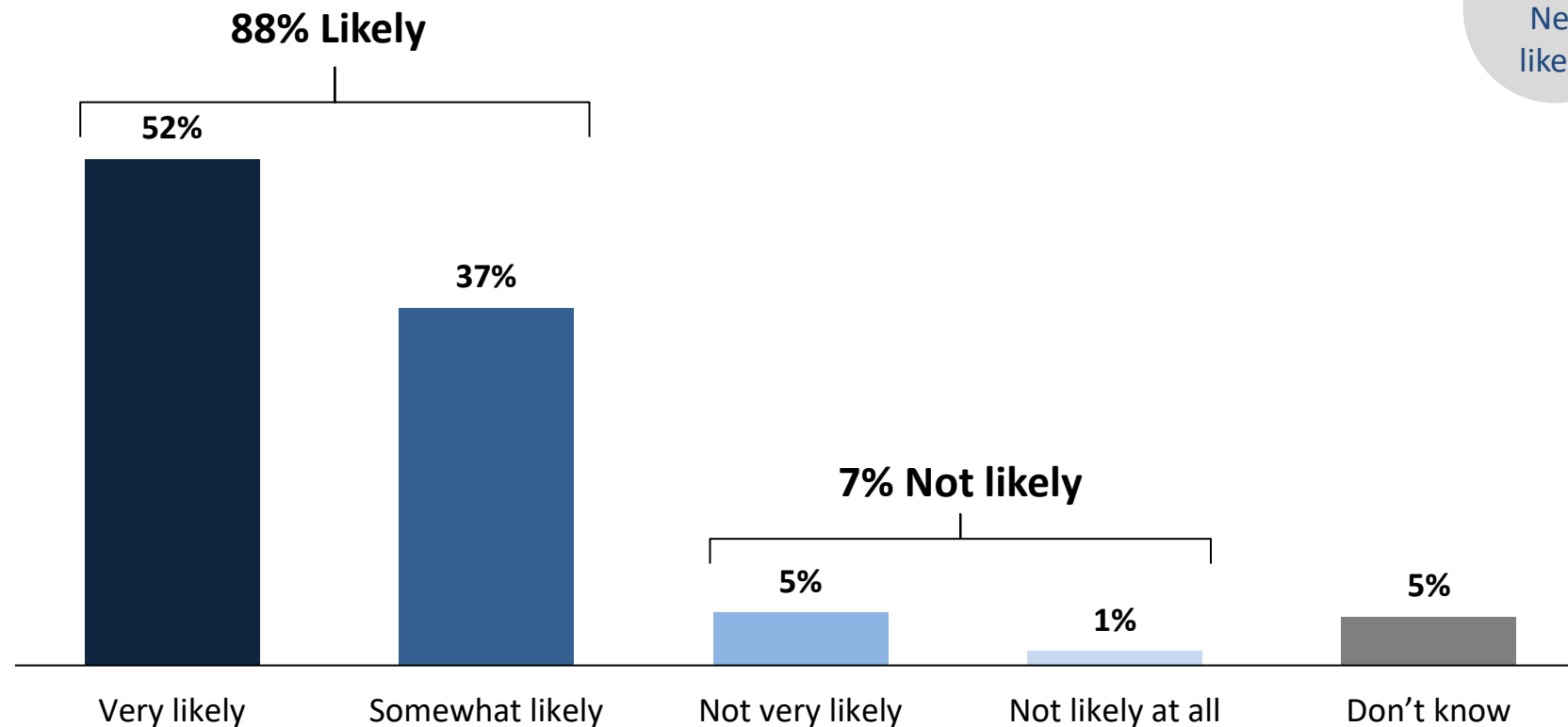
Vast majority of Canadians believe tariffs will cause higher prices for everyday goods



How likely do you think each of the following is to occur if the Canada - U.S. trade dispute continues?

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

Higher prices for everyday goods



Segmentation Those who say 'Likely'

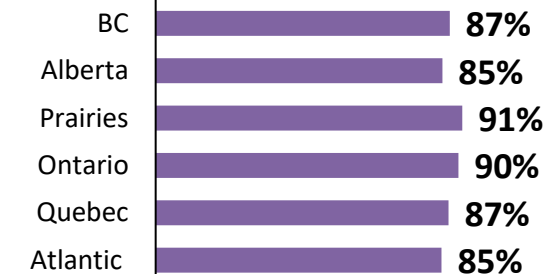
Gender



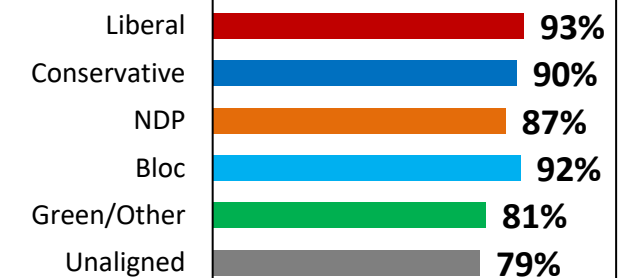
Age



Region



Party ID



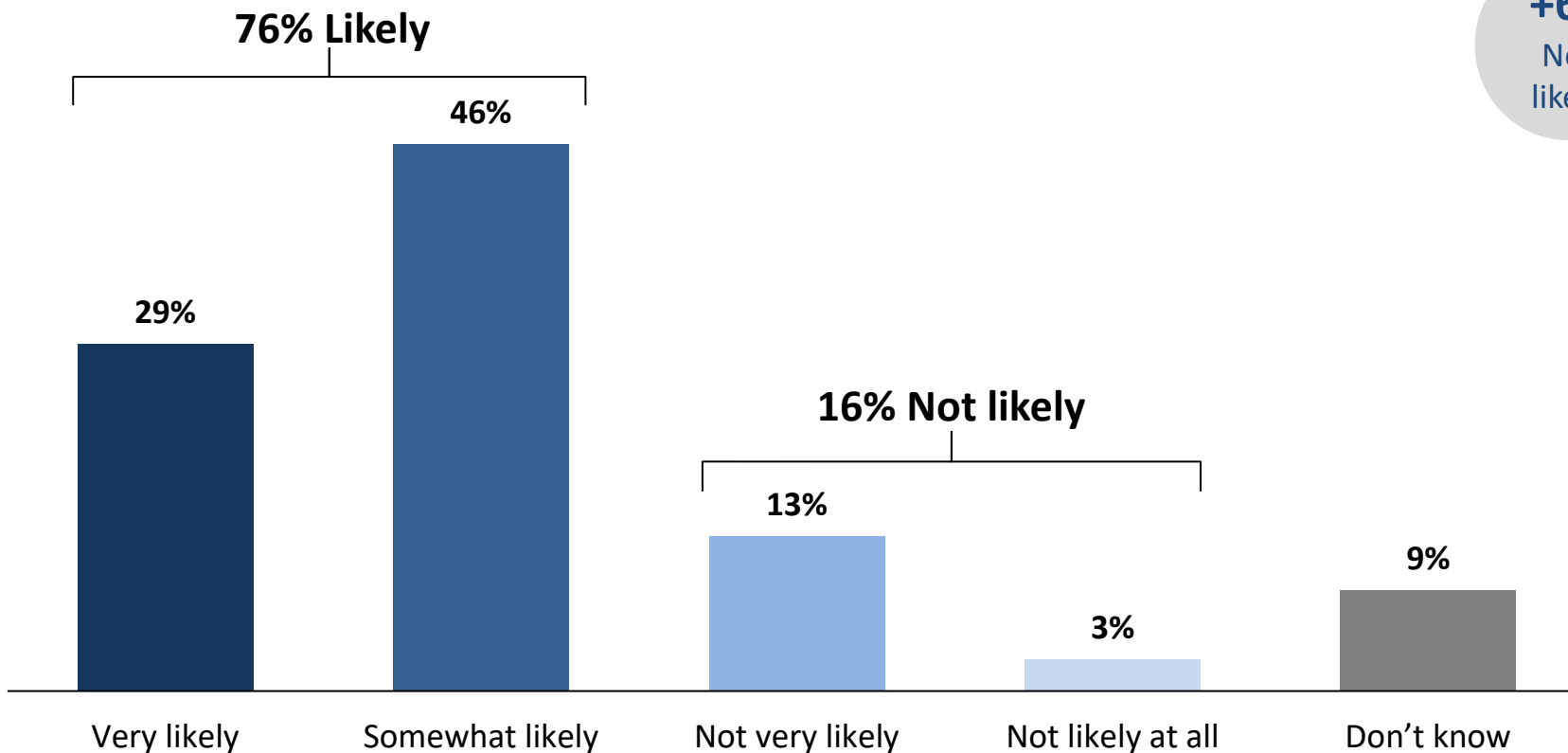
Three-in-four believe the continuing trade dispute is likely to result in significant job losses for Canadian workers



How likely do you think each of the following is to occur if the Canada - U.S. trade dispute continues?

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

Significant job losses for Canadian workers



Segmentation Those who say 'Likely'

Gender



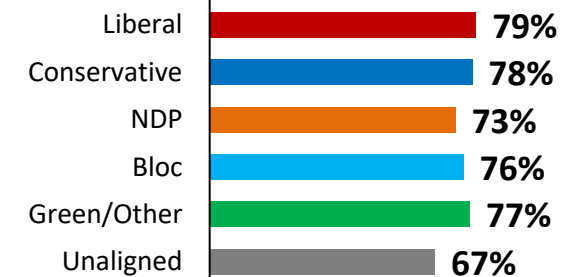
Age



Region



Party ID



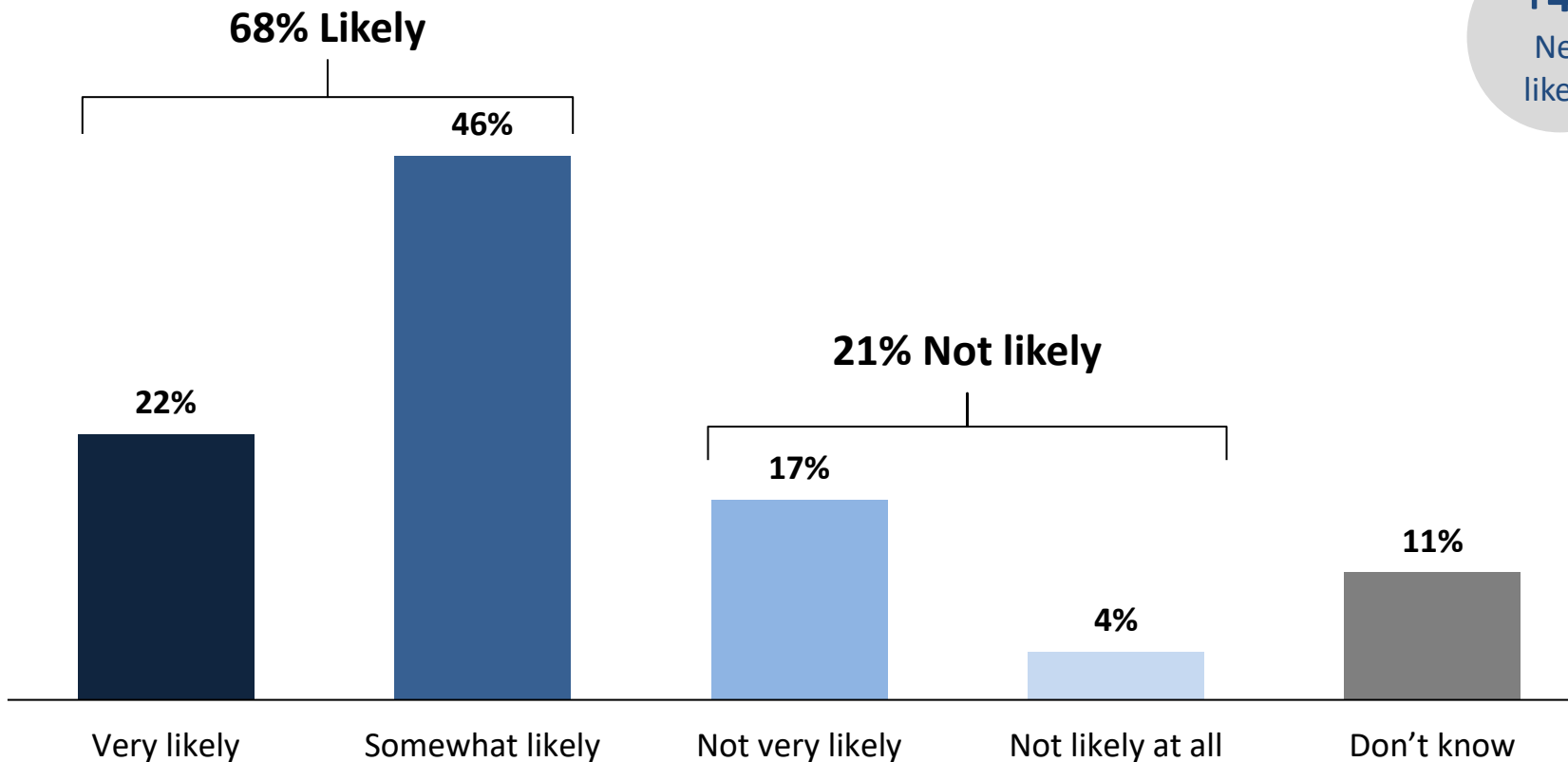
2-in-3 Canadians believe it is likely factories/businesses will close



How likely do you think each of the following is to occur if the Canada - U.S. trade dispute continues?

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

Canadian factories and businesses **permanently closing**



Segmentation Those who say 'Likely'

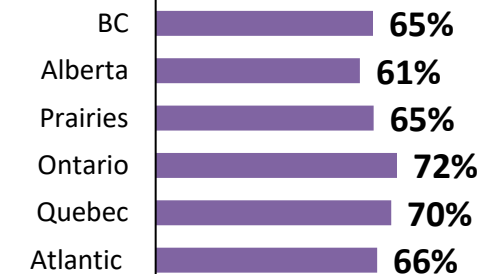
Gender



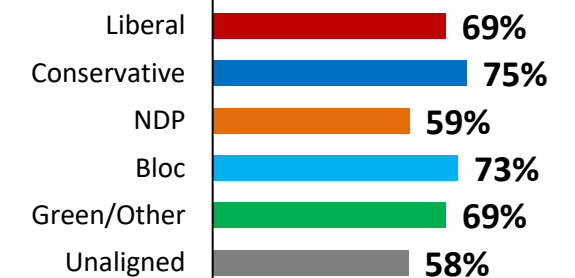
Age



Region



Party ID



Majority of Canadians now approve of federal government's response to Trump

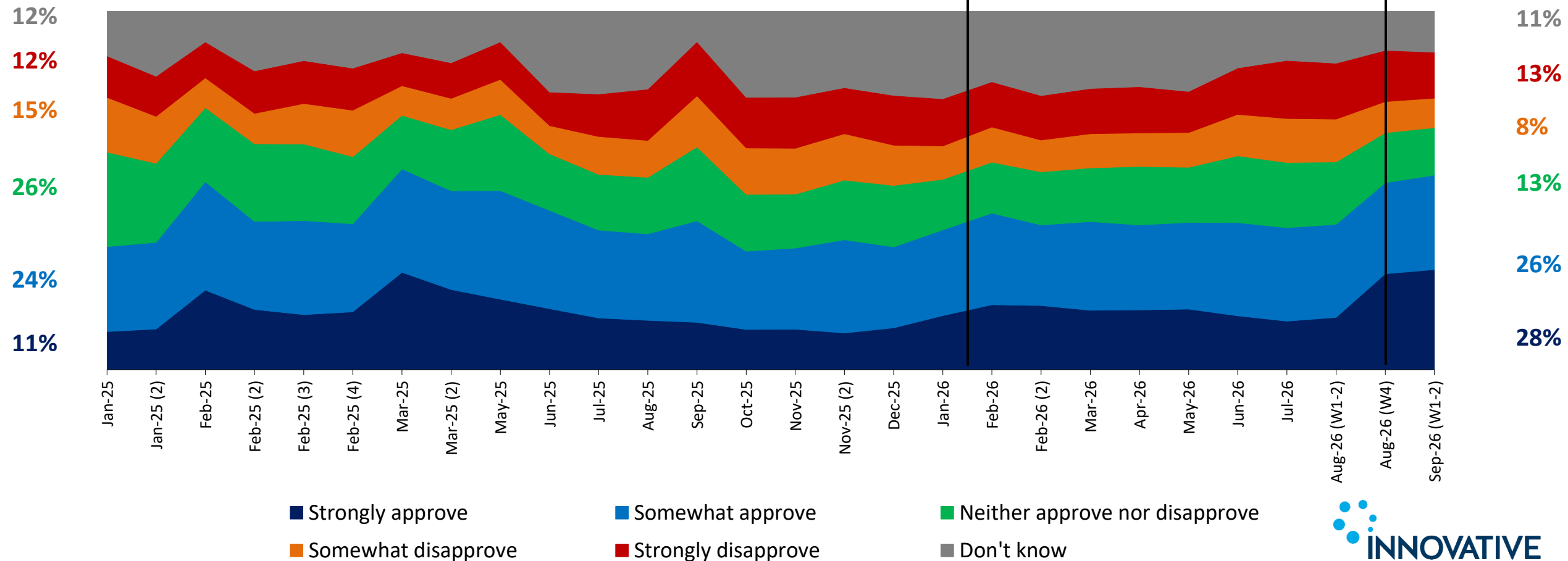


Now thinking about the federal government, do you approve or disapprove of the way the Federal government is responding to issues resulting from Donald Trump's presidency?

[asked of all respondents; Sep. '26 W1-2 n=1,000]

Jan. 22nd: World Economic Forum, speaking at Davos

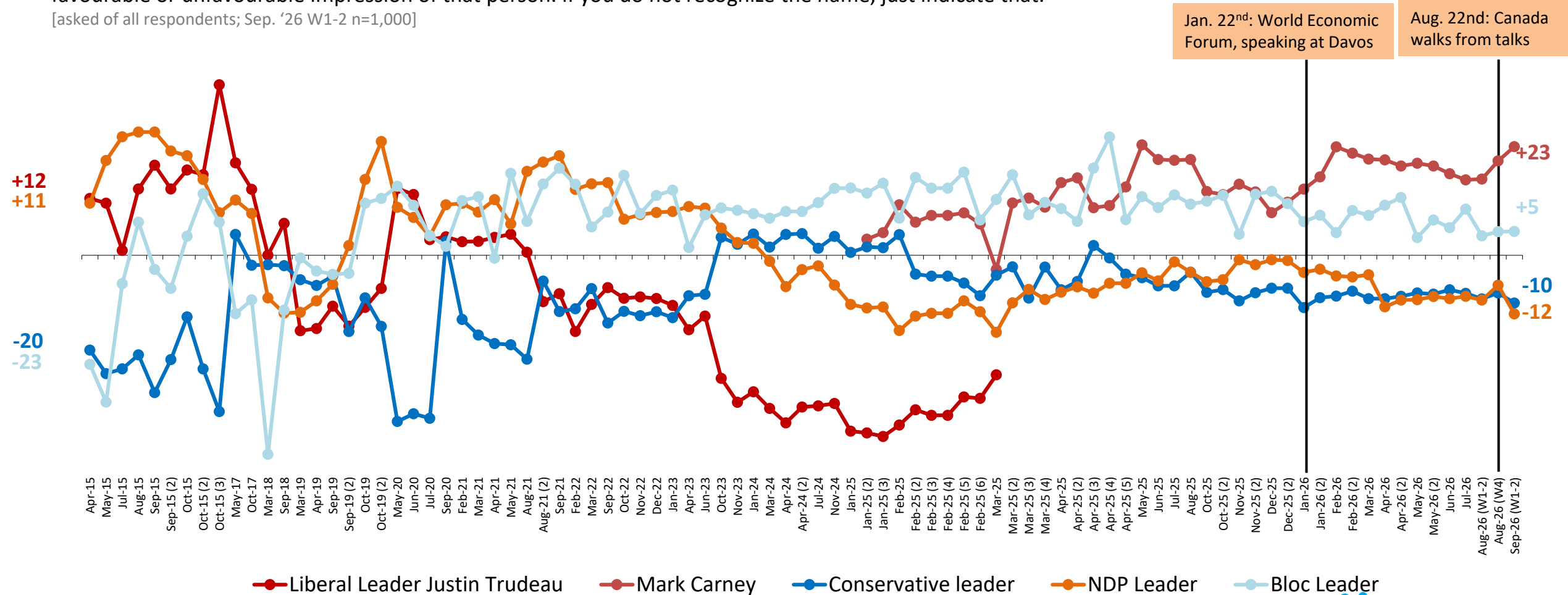
Aug. 22nd: Canada walks from talks



Carney's NET favourables increase, while opponents struggle

Q Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; Sep. '26 W1-2 n=1,000]



Note: Green Leader, People's Party Leader not shown.
Note: Results for Bloc leader for Quebec respondents only

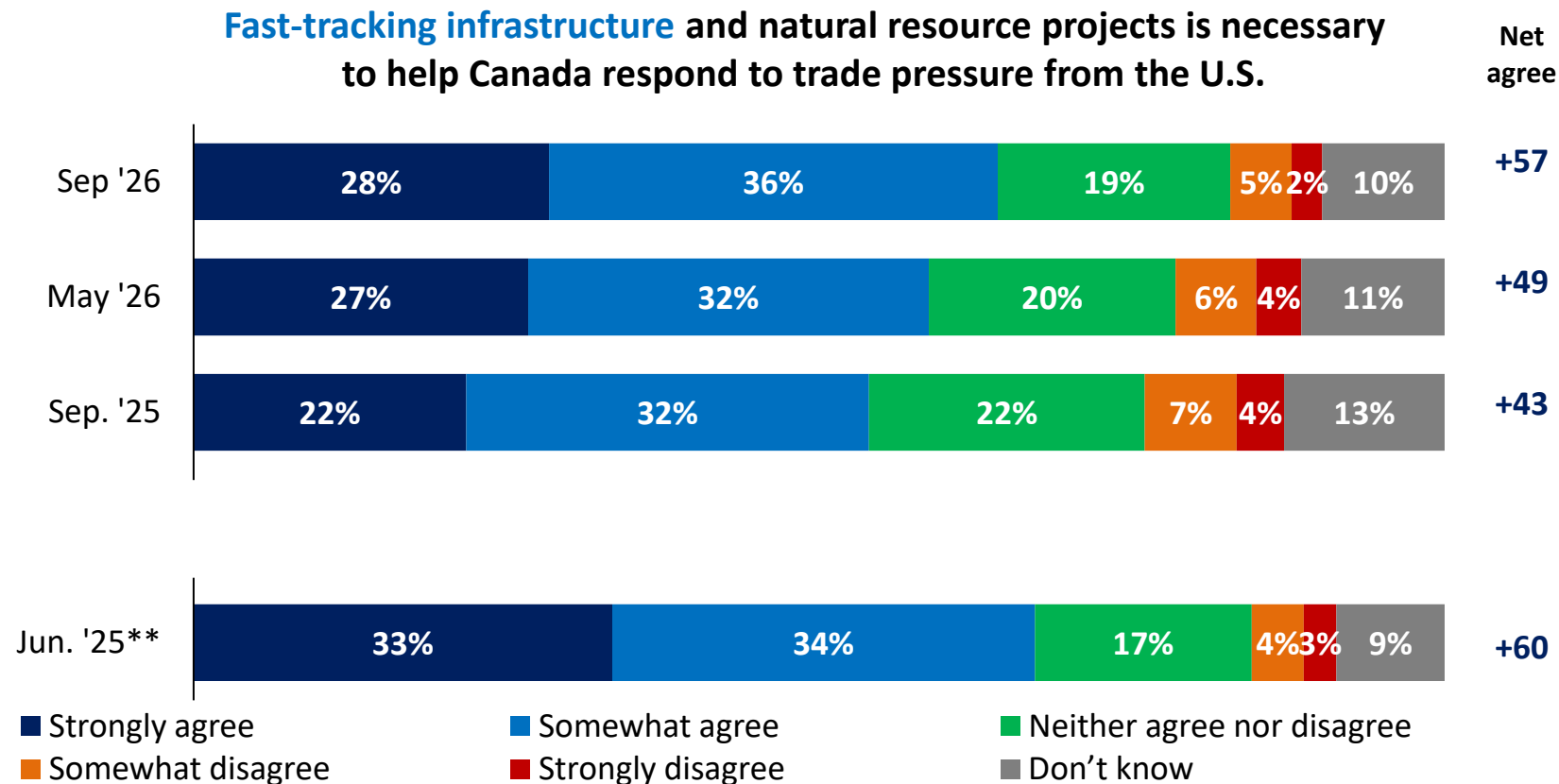
Spending Carney's Political Capital

Support for fast-tracking projects driven by desire to respond to Trump



Canadian governments, both Federal and Provincial, have passed* a variety of legislation to remove barriers to construction, and to streamline processes for approving projects. *Please indicate how strongly you agree or disagree with the following statements:

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



Segmentation Those who say 'agree'

Gender



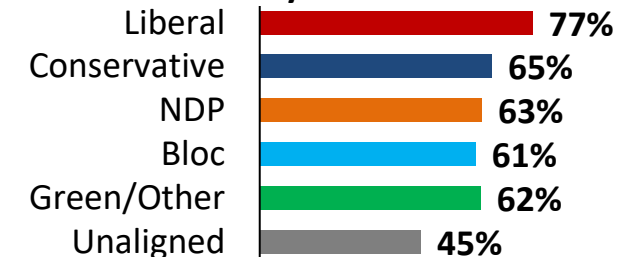
Age



Region



Party ID



Current data: Sep. 2026 (W1-2)

*In Sep. 2025, it was prelabeled with: Thinking in particular of the Federal government's Bill C-5, and before May 2026, instead of 'have passed,' we used 'are proposing'

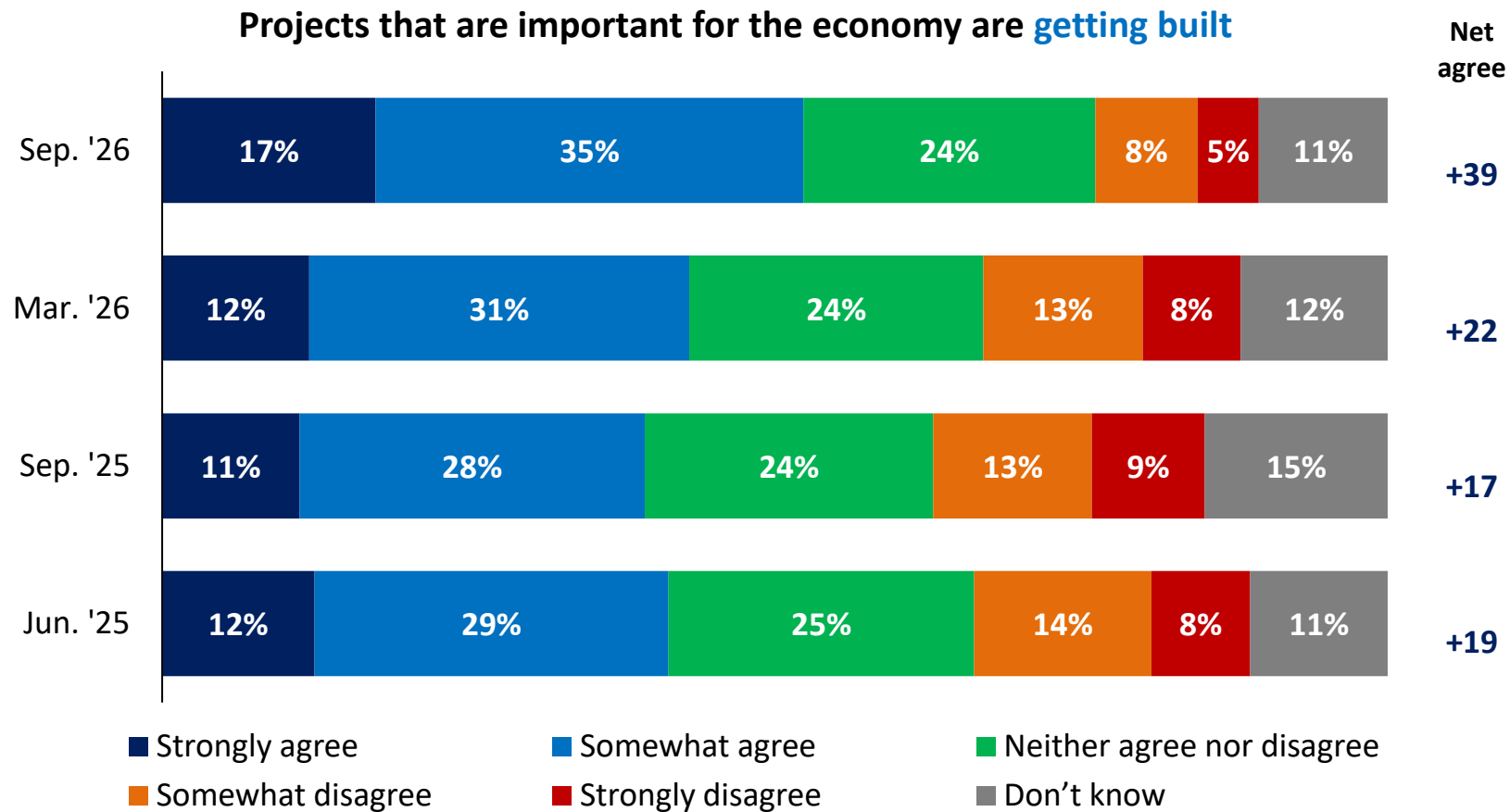
**In Jun. '25, the question was asked differently: Canada's economy needs new investment and construction to be competitive with the United States and other foreign competitors.

Majority of Canadians now believe important projects are getting built



Thinking of the current approval process for natural resource development projects like pipelines, mines, or forestry, do you agree or disagree with the following statements:

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



Segmentation

Those who say 'agree'

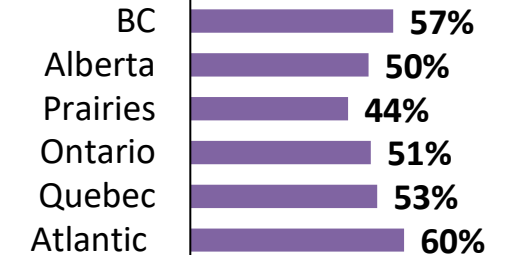
Gender



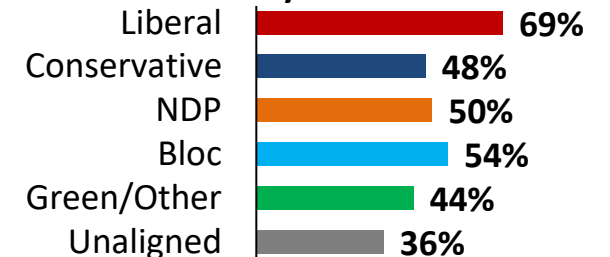
Age



Region



Party ID



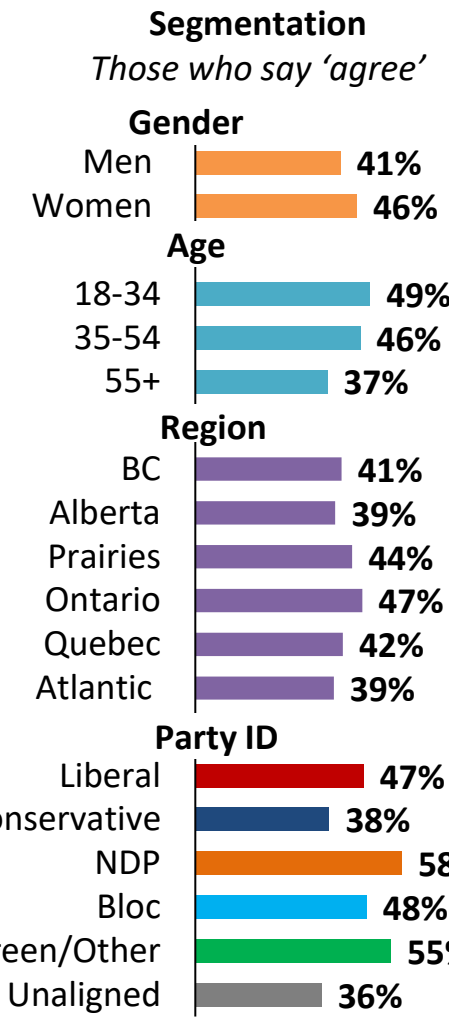
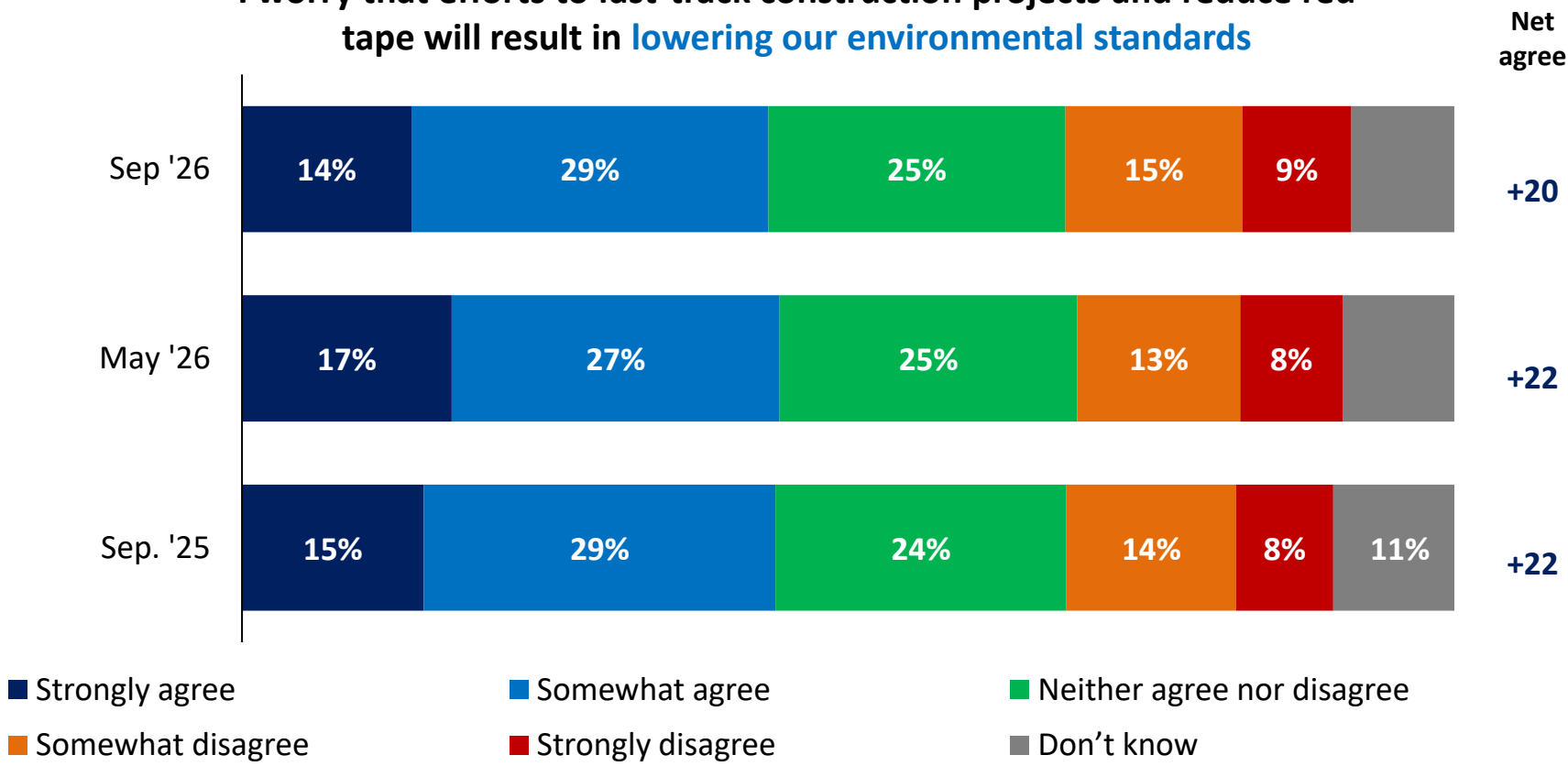
Current data: Sep. 2026 (W1-2)

*In Sep. 2025, it was prelabeled with: Thinking in particular of the Federal government's Bill C-5, and before May 2026, instead of 'have passed,' we used 'are proposing'

Since 2025, there have been no significant change in environmental concerns

Q Canadian governments, both Federal and Provincial, have passed* a variety of legislation to remove barriers to construction and to streamline processes for approving projects. *Please indicate how strongly you agree or disagree with the following statements:
[asked of all respondents, n=1,000]

I worry that efforts to fast-track construction projects and reduce red tape will result in lowering our environmental standards



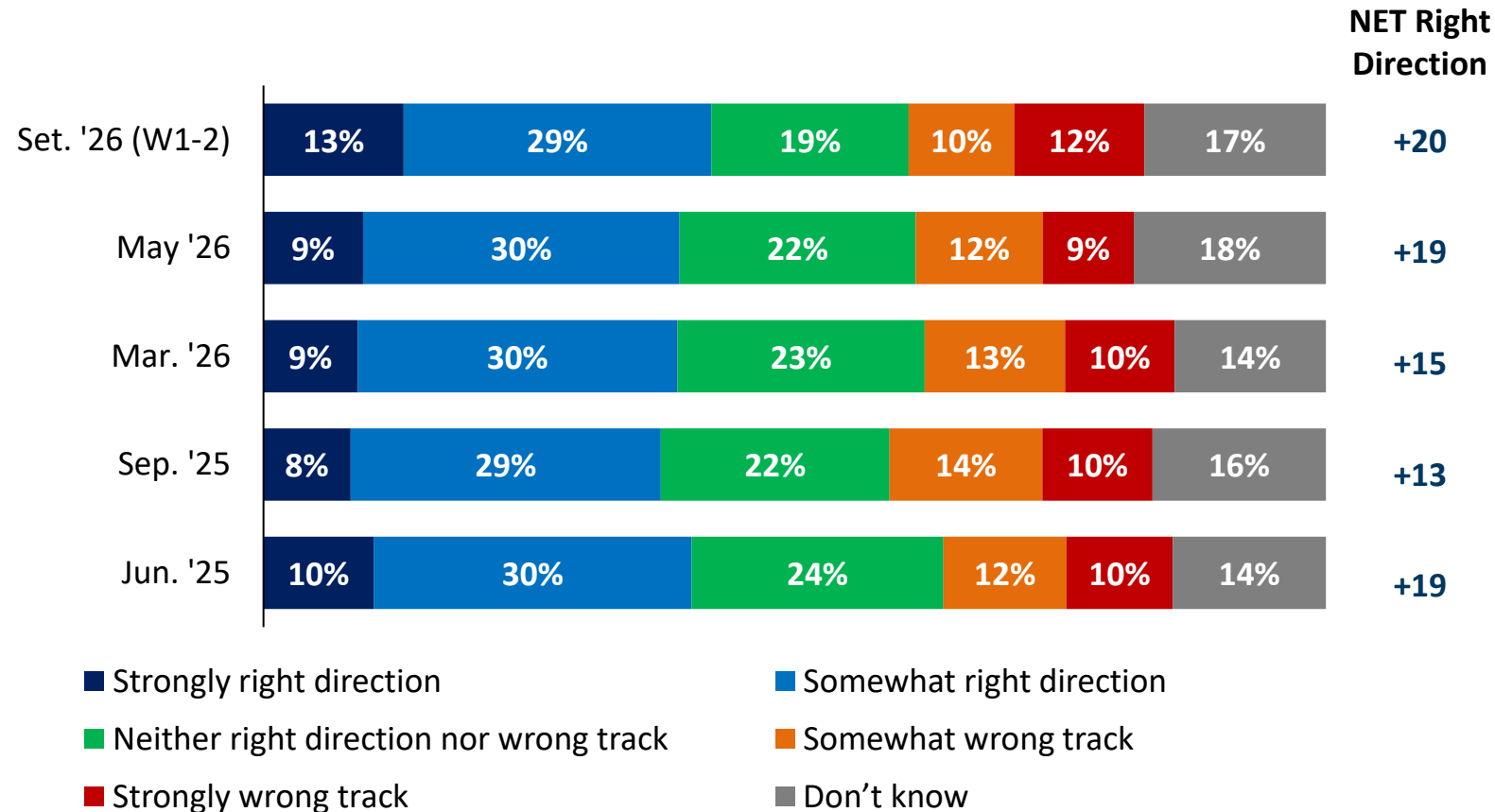
Current data: Sep. 2026 (W1-2)
*In Sep. 2025, it was prelabeled with: Thinking in particular of the Federal government’s Bill C-5, and before May 2026, instead of ‘have passed,’ we used ‘are proposing’

Over 2-in-5 say Federal Gov't is moving in right direction on project approvals

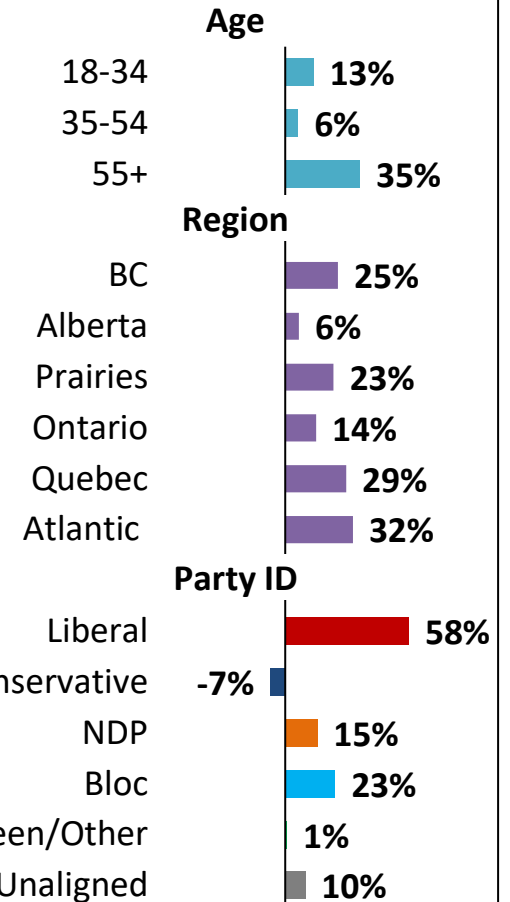


Thinking about the federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?

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



Segmentation NET 'Right direction'



Note: **Sample size <50, results should be interpreted with caution

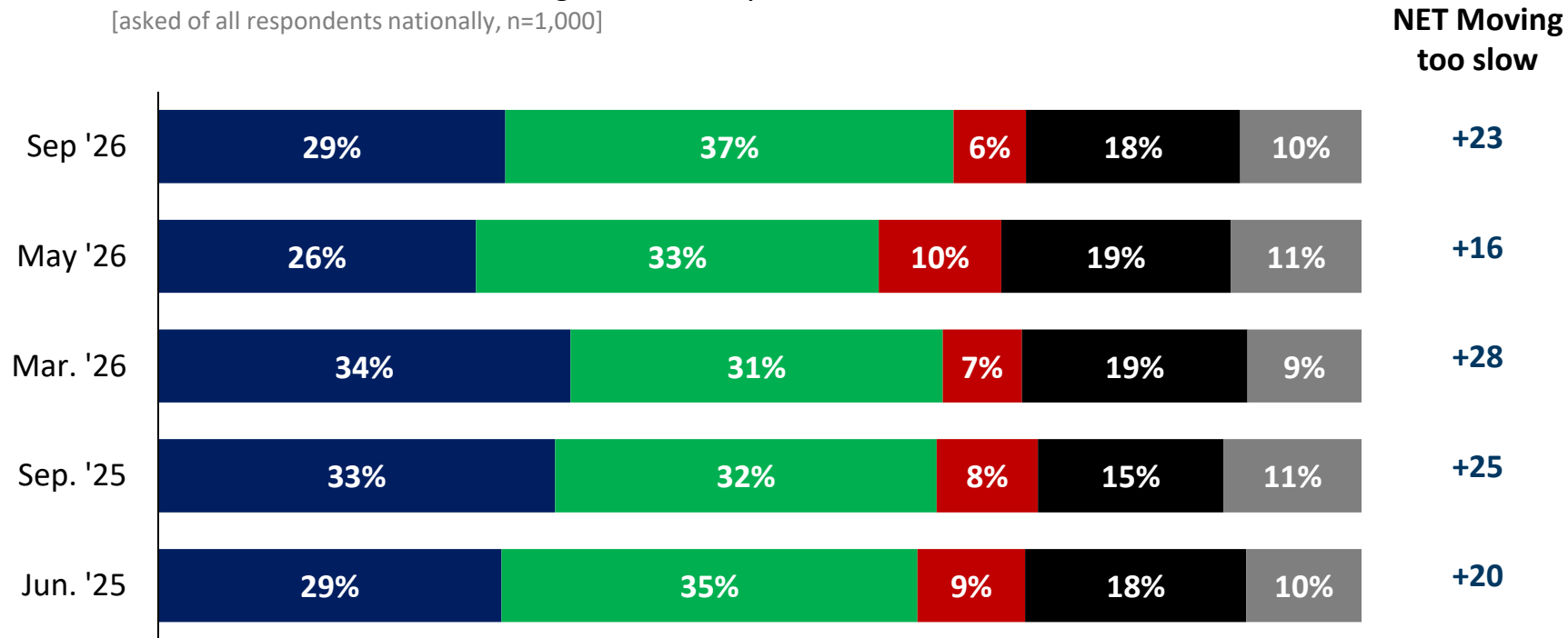
Current data: September 2026 (W1-2)

When it comes to project approvals, more Canadians say the Federal Gov't is moving *too slow*, rather than *too fast*



When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

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



- The Federal government is moving too slow
- The Federal government is moving at about the right pace
- The Federal government is moving too fast
- I'm not sure
- Don't know

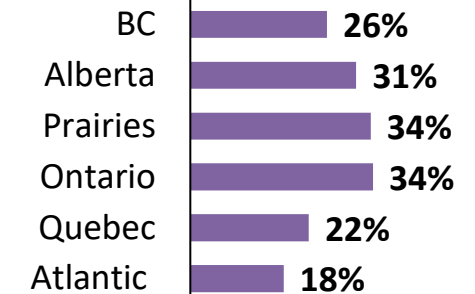
Segmentation

Those who say 'Moving too slow'

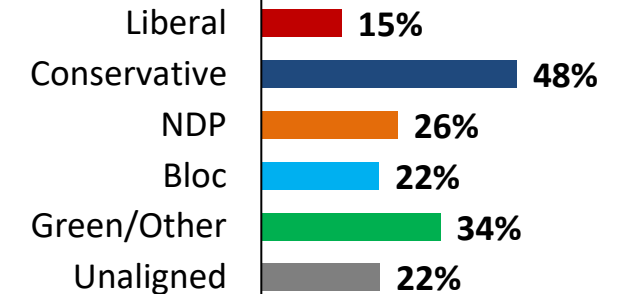
Age



Region



Party ID





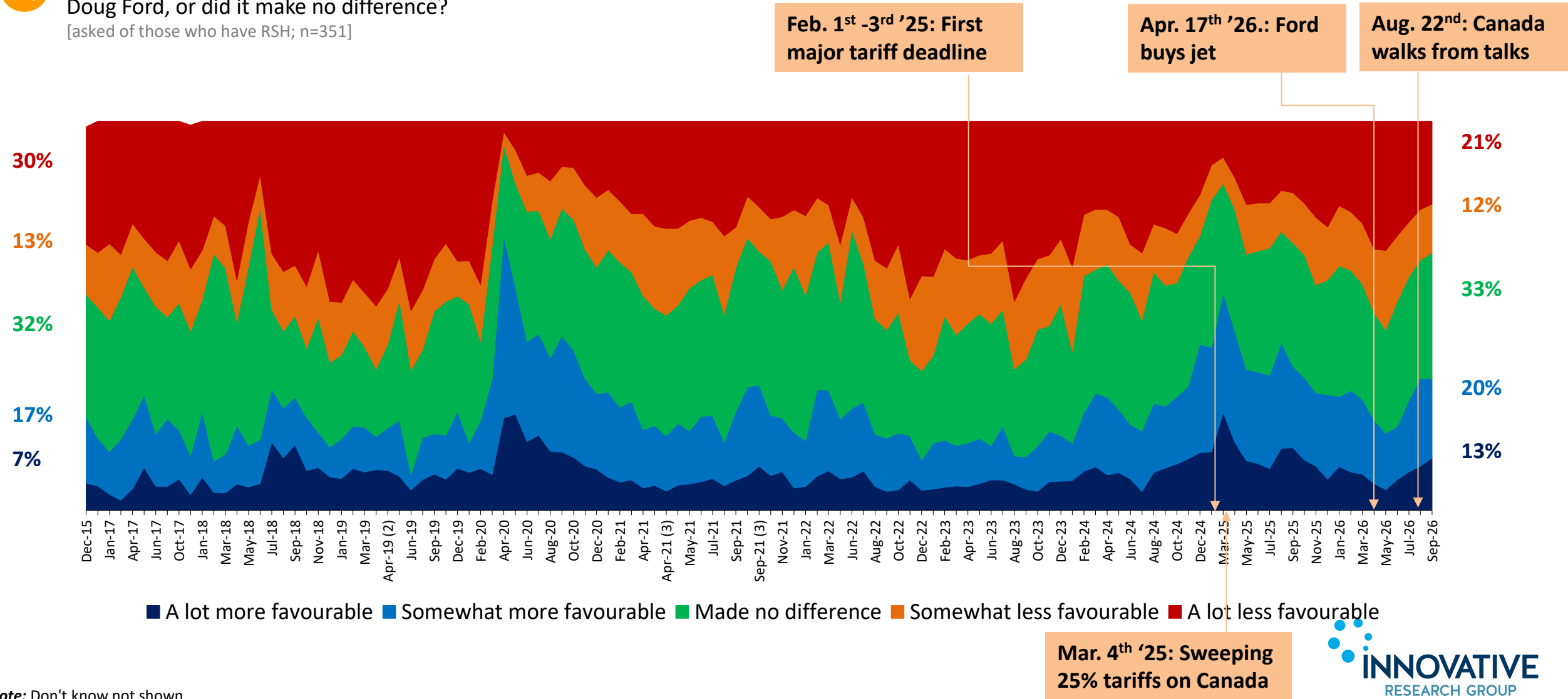
Ontario Politics

The winds of public opinion are less negative than in the summer



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=351]



Note: Don't know not shown.

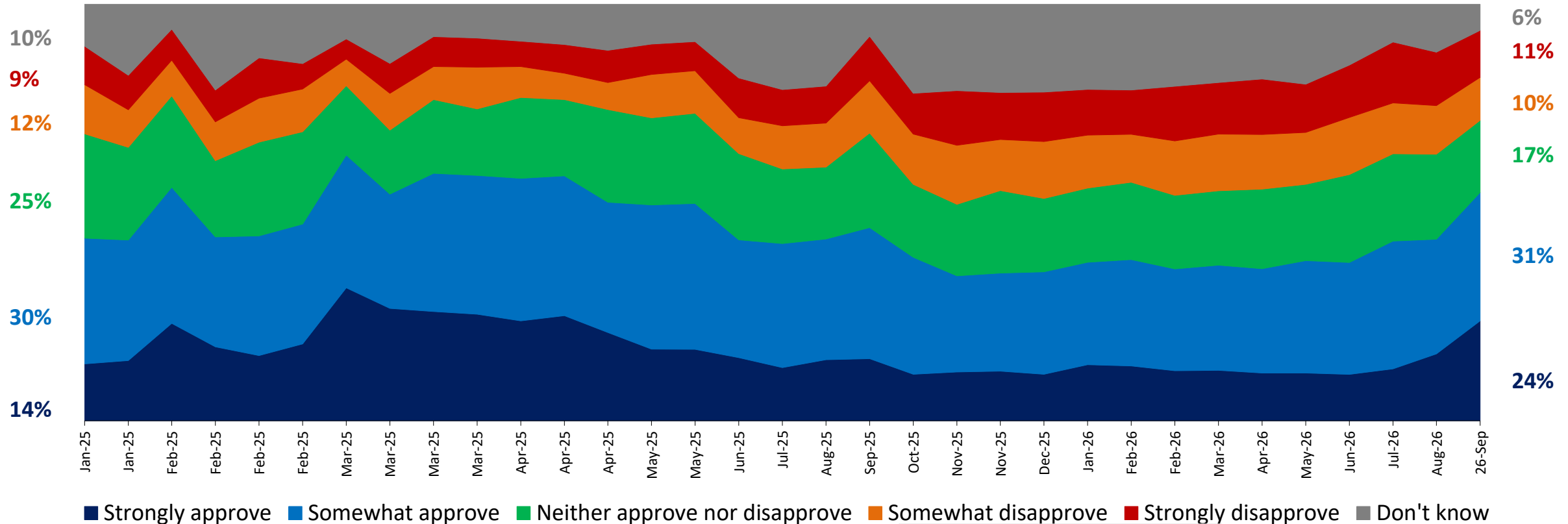
Current data: September 2026

Approval of Ontario Gov't response to Trump rose 11-points since August, to 55%



Do you approve or disapprove of the way the Ontario government is responding to issues resulting from Donald Trump's presidency?

[asked of those in Ontario; n=600]



Strongly approve Somewhat approve Neither approve nor disapprove Somewhat disapprove Strongly disapprove Don't know

Feb 2026

*U.S. Supreme Court rules
February tariffs invalid*

Aug 22, 2026

Canada walks from talks

Jan 6, 2025
Trudeau resigns

Mar 14, 2025
Carney elected PM

Apr 17, 2026
Ford buys jet

July 1, 2026
CUSMA negotiations

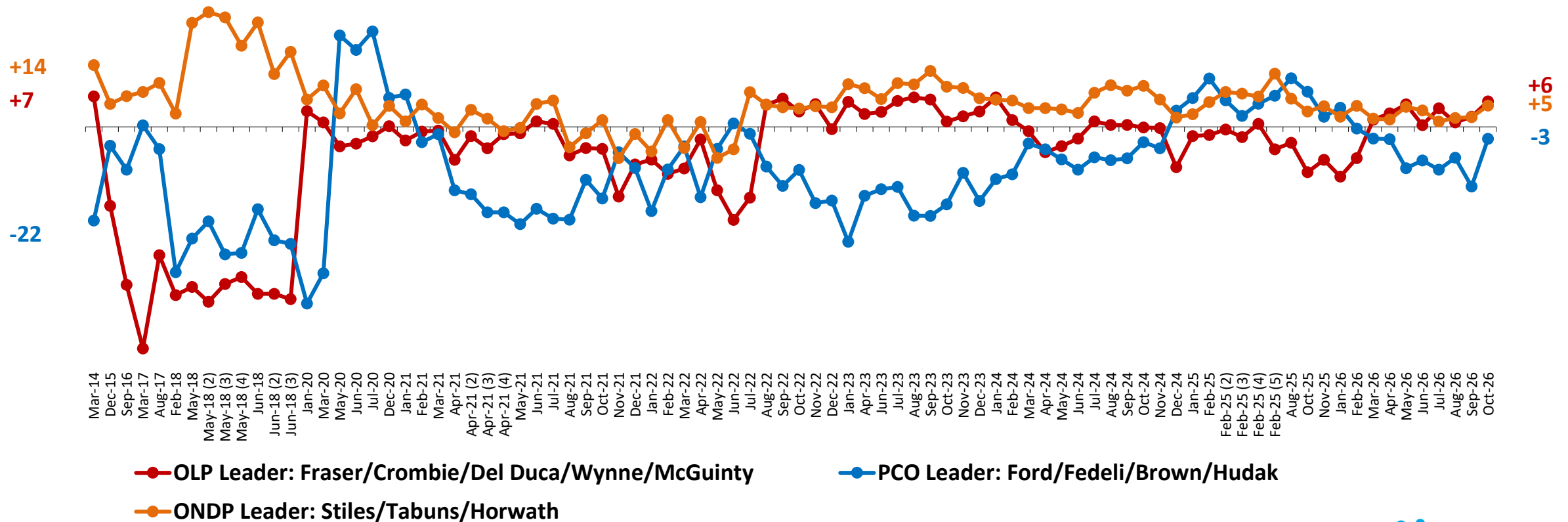
Current data: September 2026

Ford's Net Favours show delayed rebound

Q

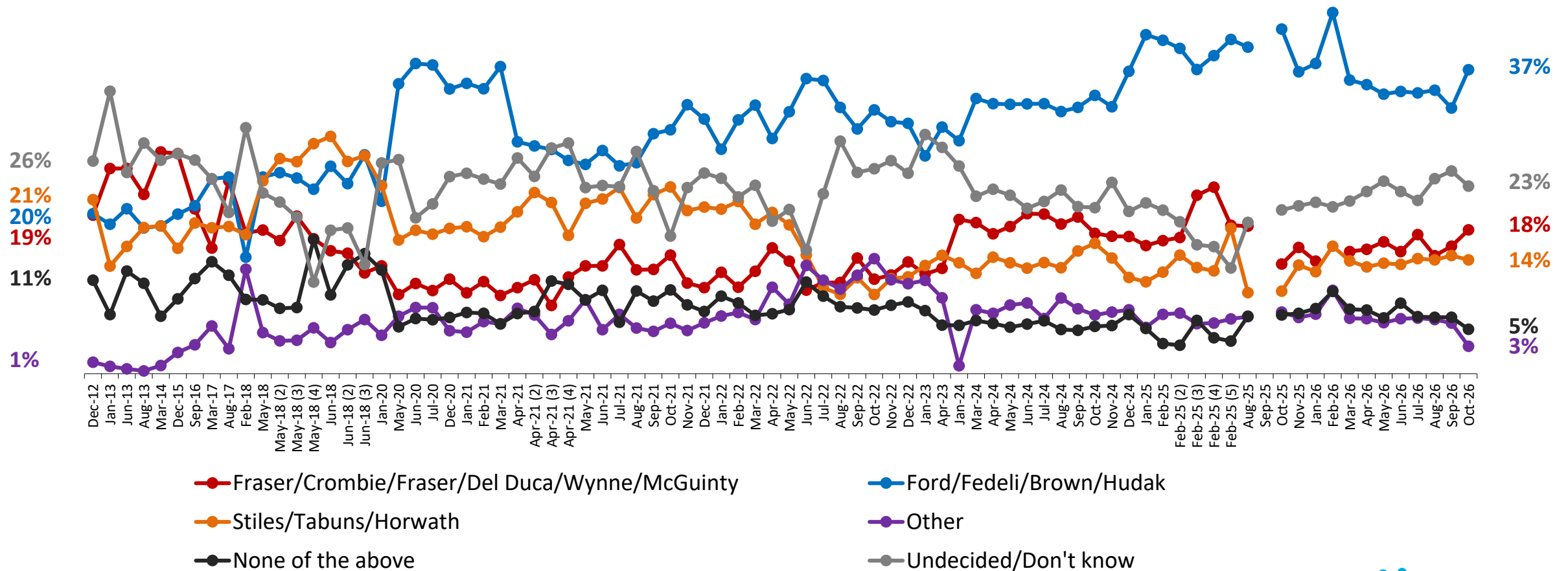
Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=600]



Ford rebounds on Best Premier tracking

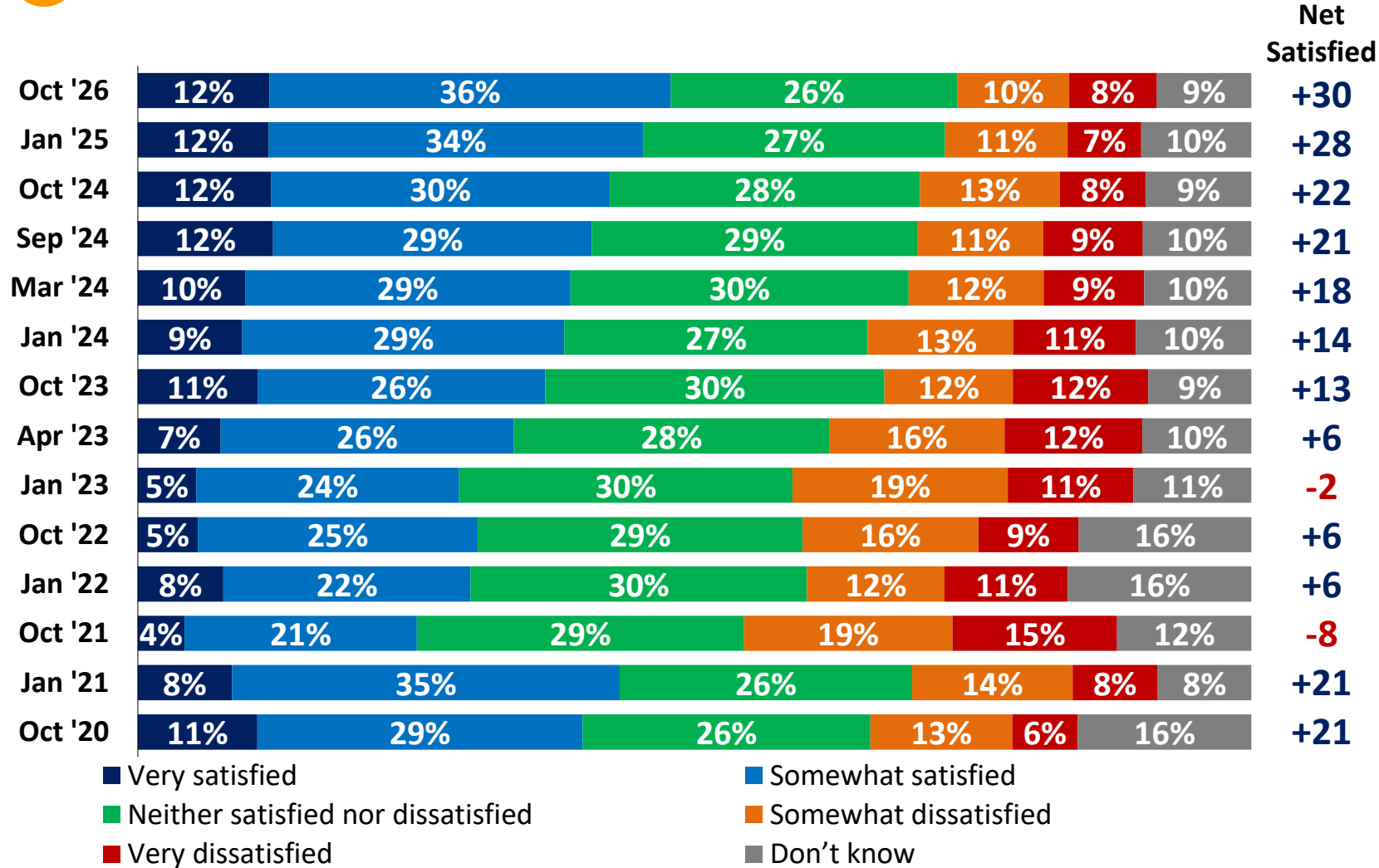
Q Which of the following leaders would make the best Premier of Ontario?
[asked of all respondents; n=600]



The Ontario Government on Electricity

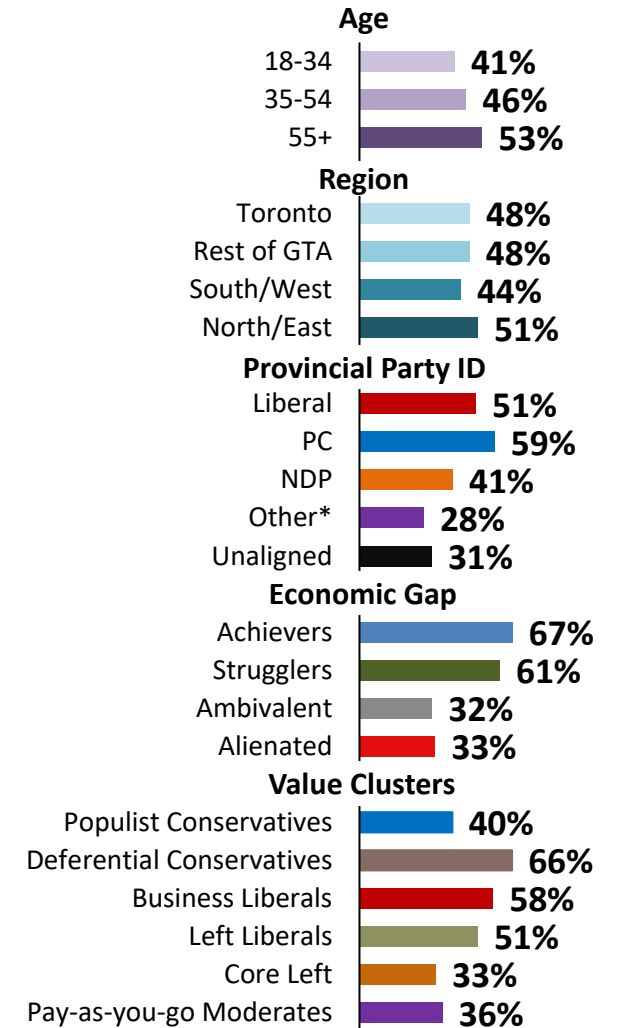
Ontario Government hits new high on electricity

Q How satisfied are you with the job your provincial government is doing to manage the electricity system?
[asked of all respondents, ON n=600]



Segmentation

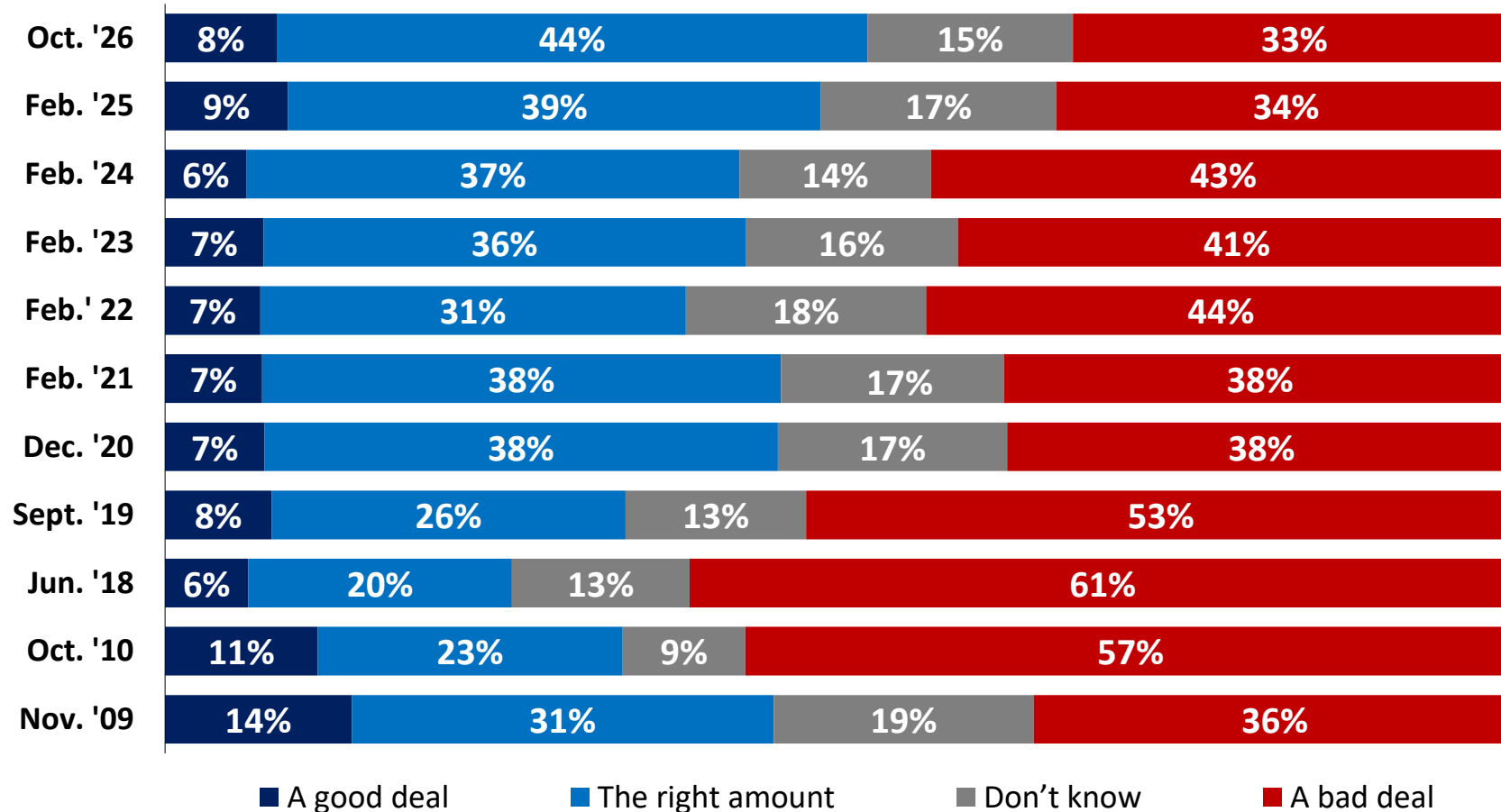
Those who say "Satisfied"



How can the Government be so high given affordability concerns?

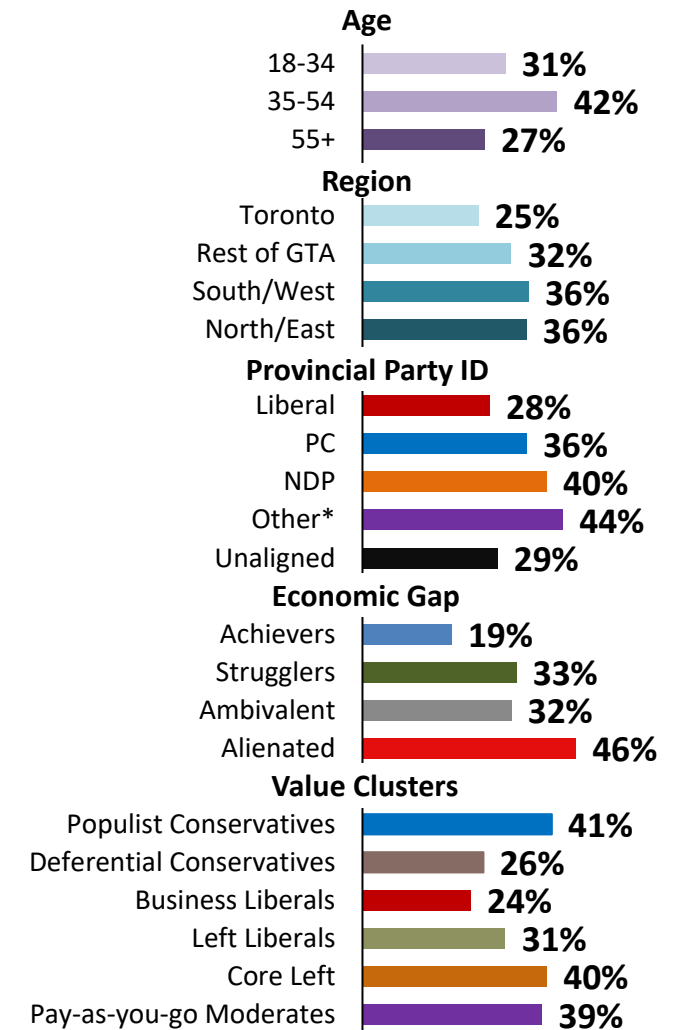
Perceptions of electricity prices in Ontario have never been better

Q Thinking about how much you pay for electricity, do you think the price you are paying is a good deal, a bad deal, or about the right amount?
[asked of all Ontario respondents n=600]



Segmentation

Those who say, "A bad deal"

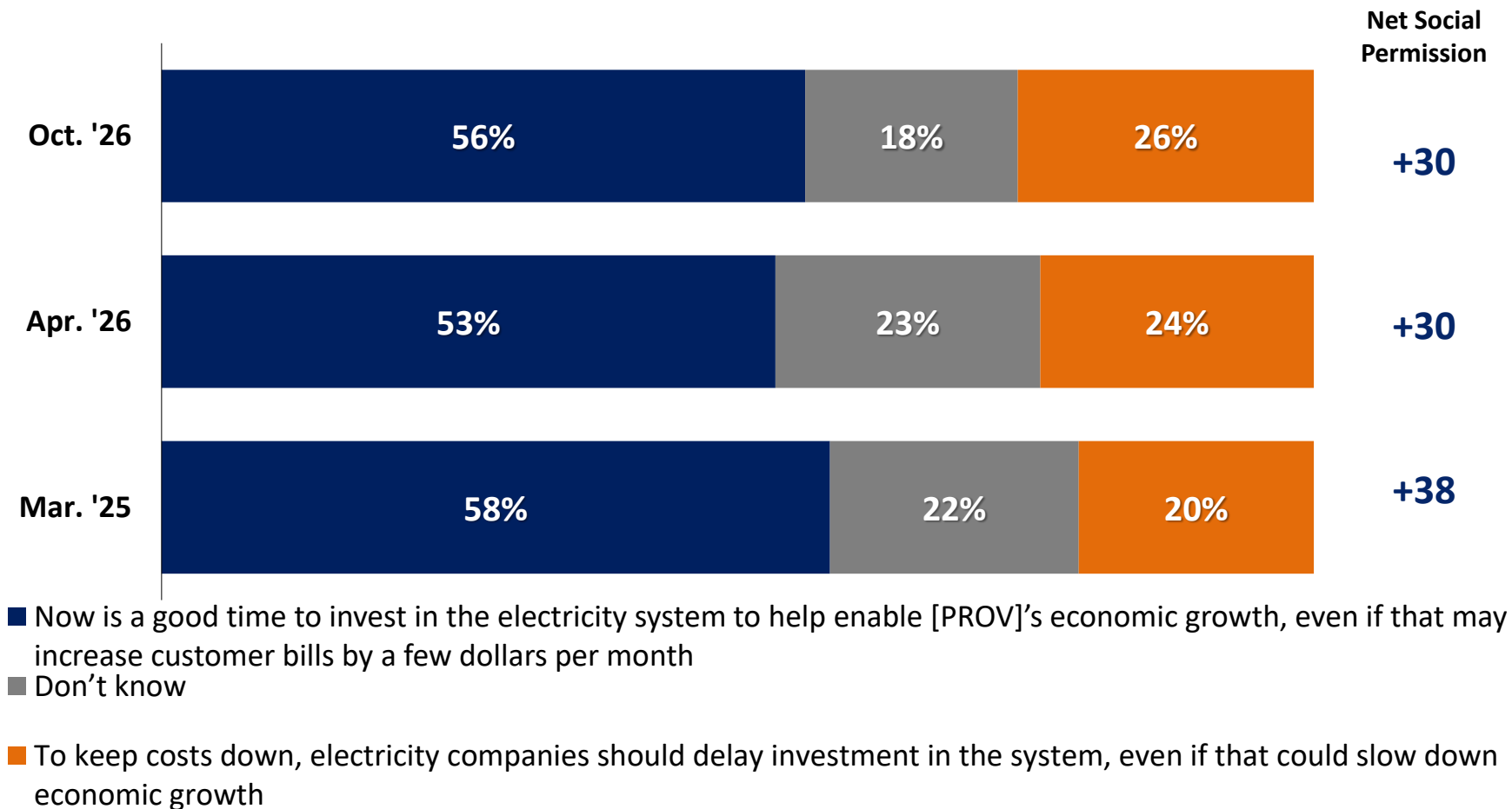


Note: Tracking was added from CTM most recently in Feb 2025 (included in CTM monthly going back to Dec 2012. Nimby.16 and Nimby.04(CTM1010) were also included, and CTM data was used instead of Nimby.16 for 2021)

'Build Baby Build' applies to electricity too!

Q Over the next 25 years, the amount of electricity being used in Ontario is expected to rise significantly. This will require electricity companies to make significant investments in the electricity system. Investing in the electricity system will play an important role in Ontario's ability to attract new businesses and grow the economy. Which of the following is closest to your point of view?

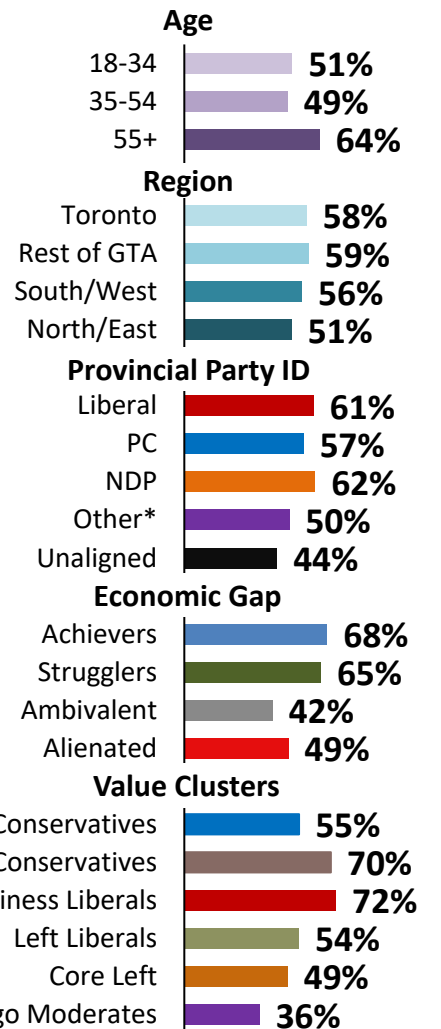
[asked of all respondents ON n=600]



Current data: October W1 2026

Segmentation

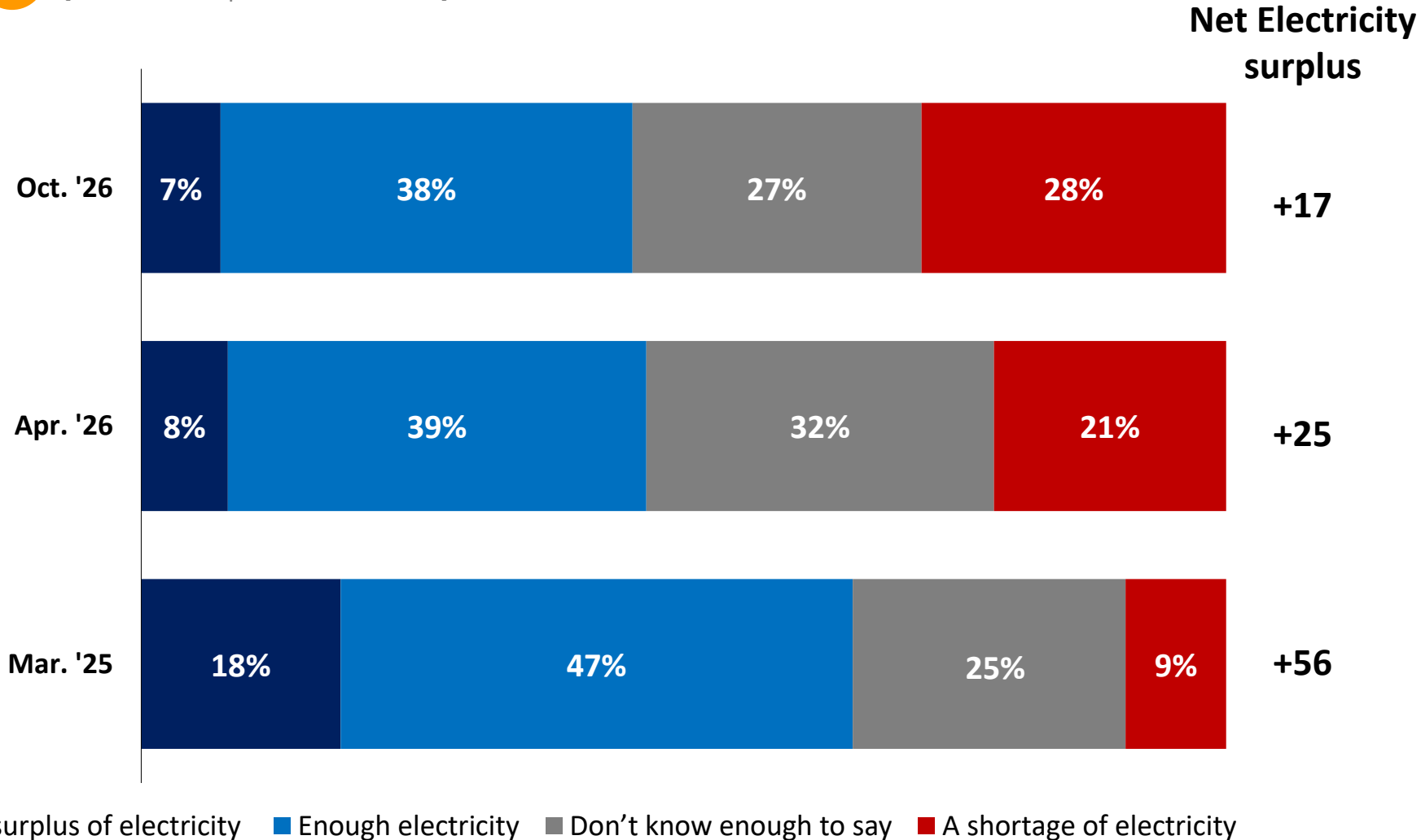
Those who say, "Good time to invest"



Willing to Pay More?

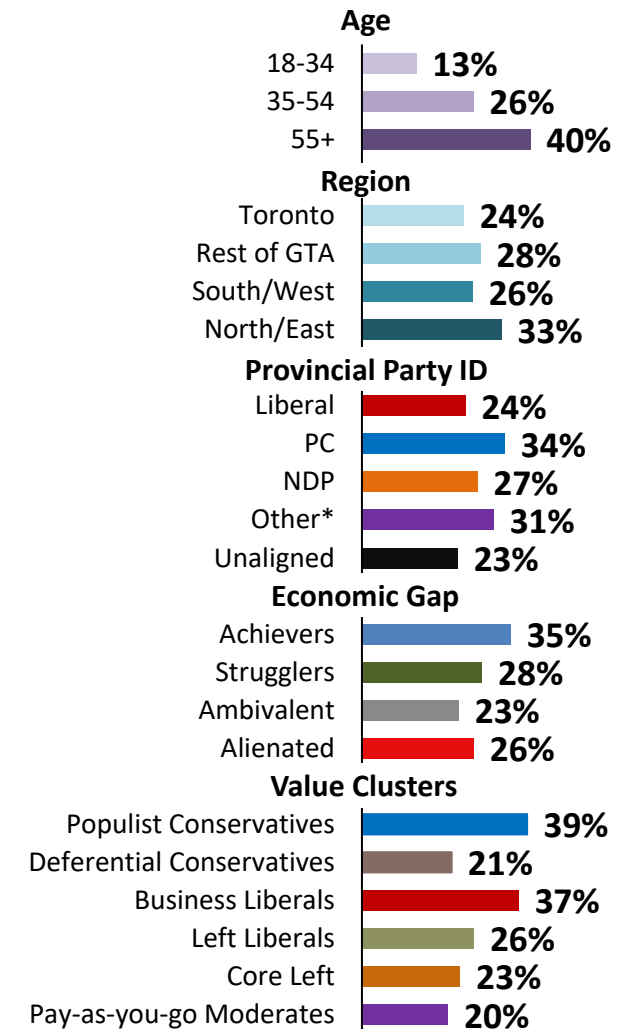
Recognition that Ontario needs more power is growing

Q Do you think that Ontario has access to enough electricity to accommodate our future economic growth?
[asked of all respondents ON n=600]



Segmentation

Those who say, "A shortage of electricity"



Note: Net Electricity Surplus is the difference between the sum of Surplus/Enough electricity and Shortage

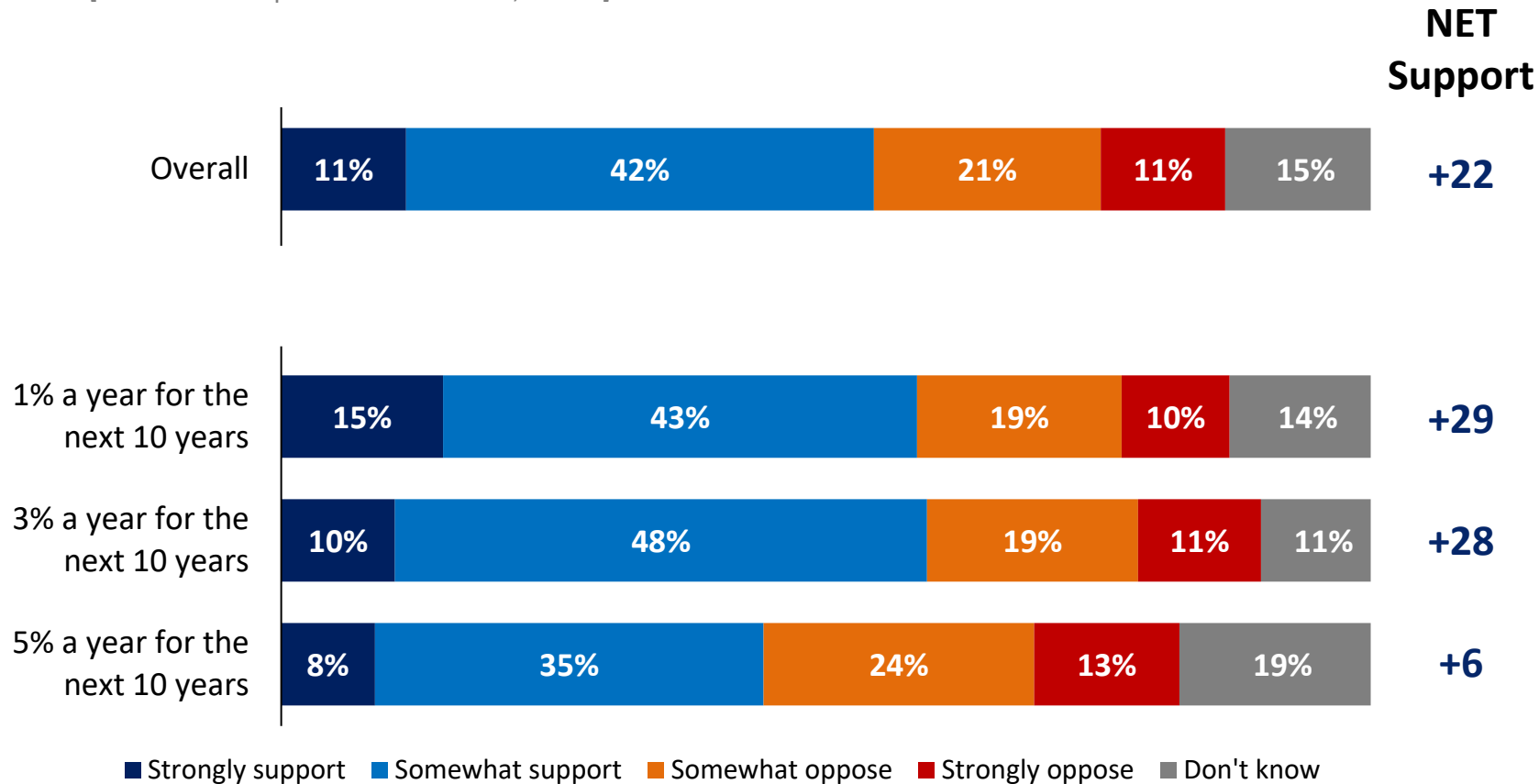
Willingness-to-pay: Overall, net support for bill increases is positive; highest support for 1% and 3% annual increases



Electricity prices will need to increase to fund expansion of the electricity grid.

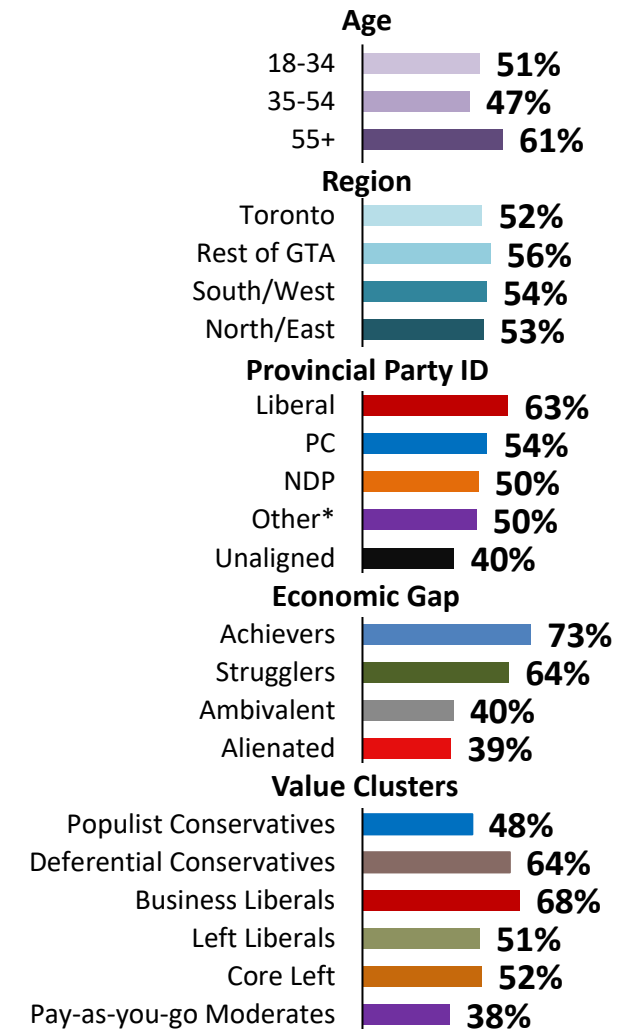
Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by:

[asked of all respondents in Ontario; n=600]



Segmentation

Those who say "Support overall"



Electrification pricing tracking: the question changed between Sep '24 and Apr '26



The following tracking charts combine two related—but not identical—question frames.

Constant across both: support/oppose response and a randomly assigned 1%, 3%, or 5% bill-increase level.

JAN '23 → SEP '24 · 6 waves

Energy transition/non-emitting framing

Longer rationale connected the grid build to the energy transition.

QUESTION WORDING USED

Electricity prices will have to rise to pay for **expanding the electricity grid with non-emitting generation**. You might be able to offset some of these costs by reducing the amount of automotive fuel or home heating fuel you currently purchase. The more we pay in electricity rates, the quicker we can implement the energy transition.

Do you support or oppose investments to enable electrification, if in addition to routine increases, your electricity bill will grow by.

//

APR '26 → OCT '26 · 2 waves

Grid-expansion framing

Shorter rationale focused directly on expanding the electricity grid.

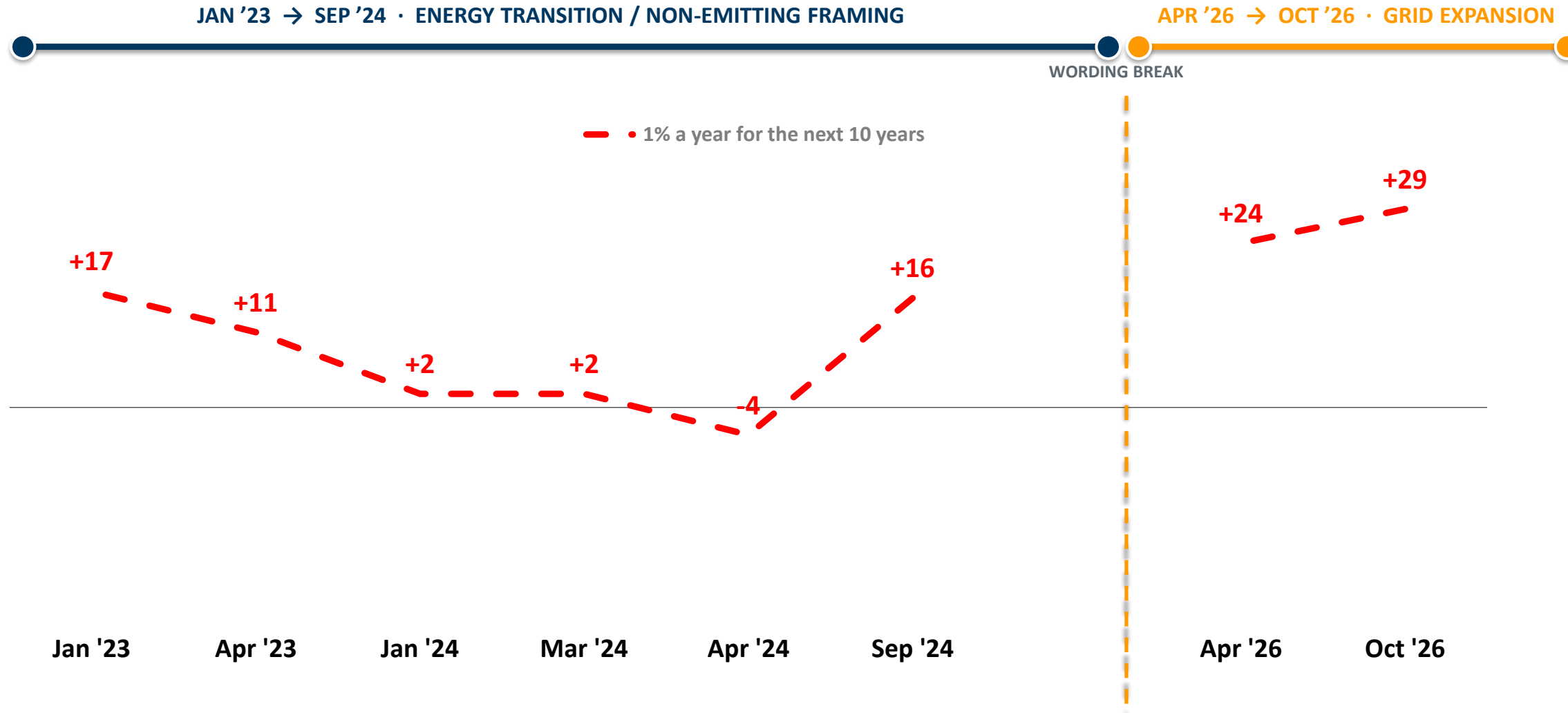
QUESTION WORDING USED

Electricity prices will need to increase to fund **expansion of the electricity grid**.

Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by

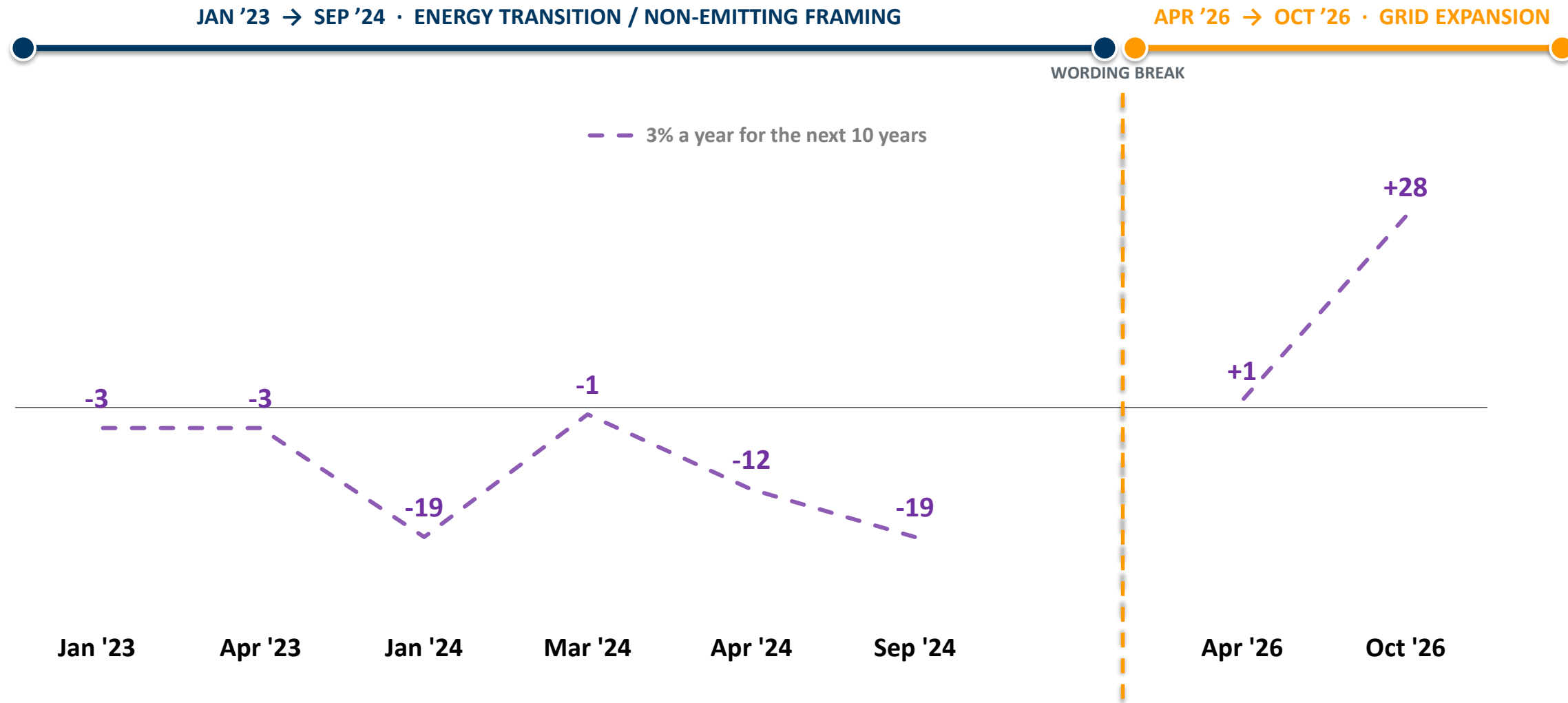
- 1% a year for the next 10 years?
- 3% a year for the next 10 years?
- 5% a year for the next 10 years?

Electrification Pricing @ 1% annual increase: At +29, support continues to outweigh opposition to paying 1% more for grid expansion, vs. +24 in Apr



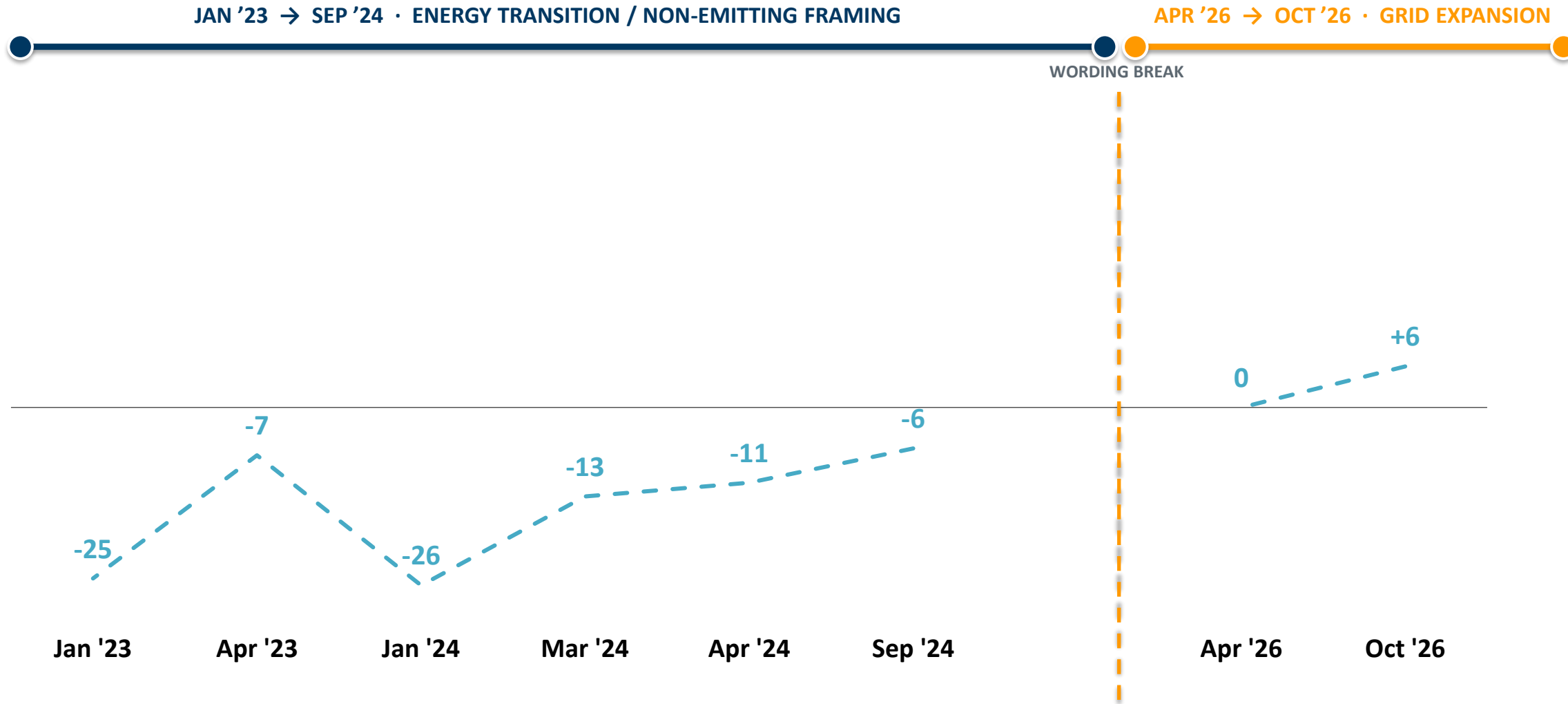
Interpretation: Read movement within each framing period; the wording changed after Sep '24

Electrification Pricing @ 3% annual increase: Net support for paying 3% more to expand the grid reaches +28, versus +1 in Apr '26



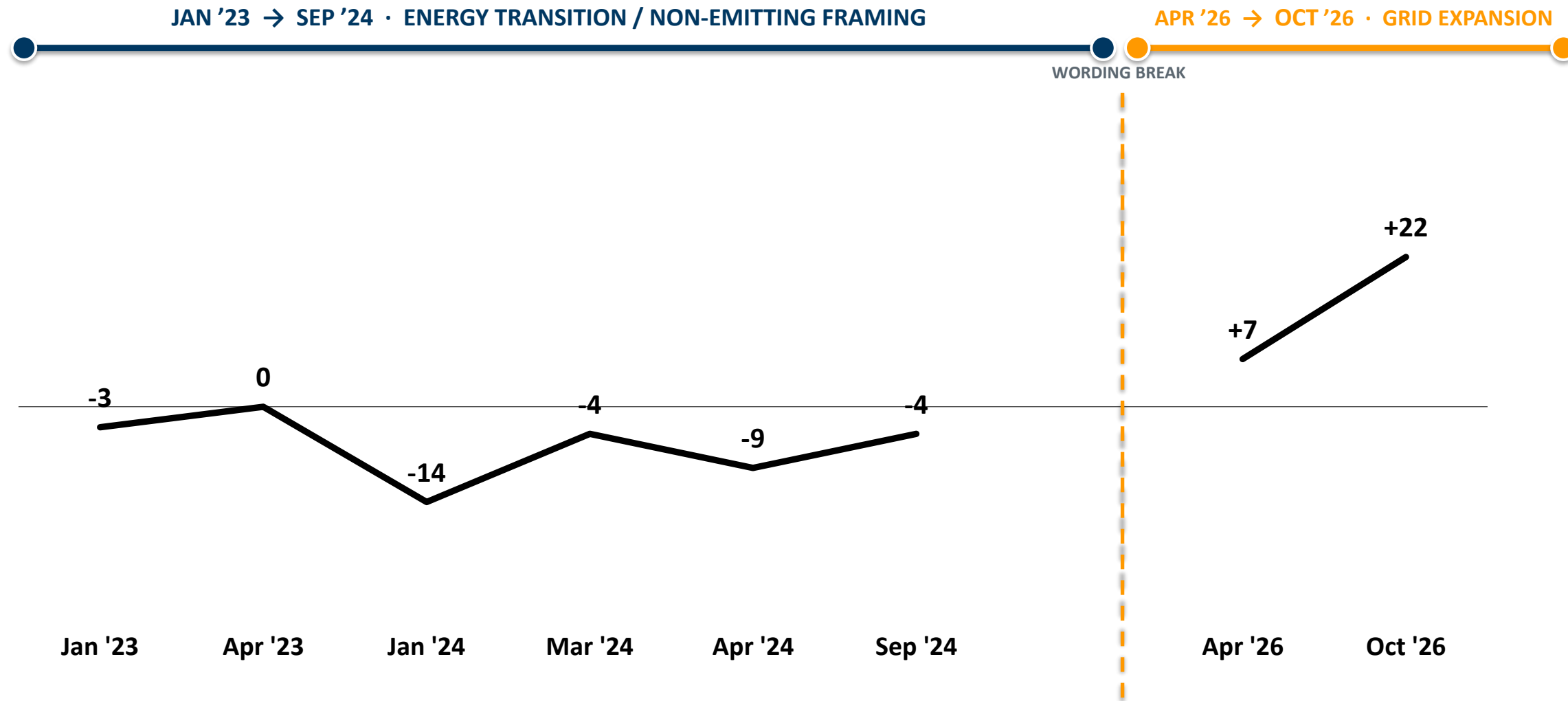
Interpretation: Read movement within each framing period; the wording changed after Sep '24

Electrification Pricing @ 5% annual increase: Support narrowly outweighs opposition to paying 5% more for grid expansion, at +6 now vs 0 in April



Interpretation: Read movement within each framing period; the wording changed after Sep '24

Electrification Pricing | Overall net support: Net support for paying more to expand the grid reaches +22 versus +7 in April 2026



Interpretation: Read movement within each framing period; the wording changed after Sep '24



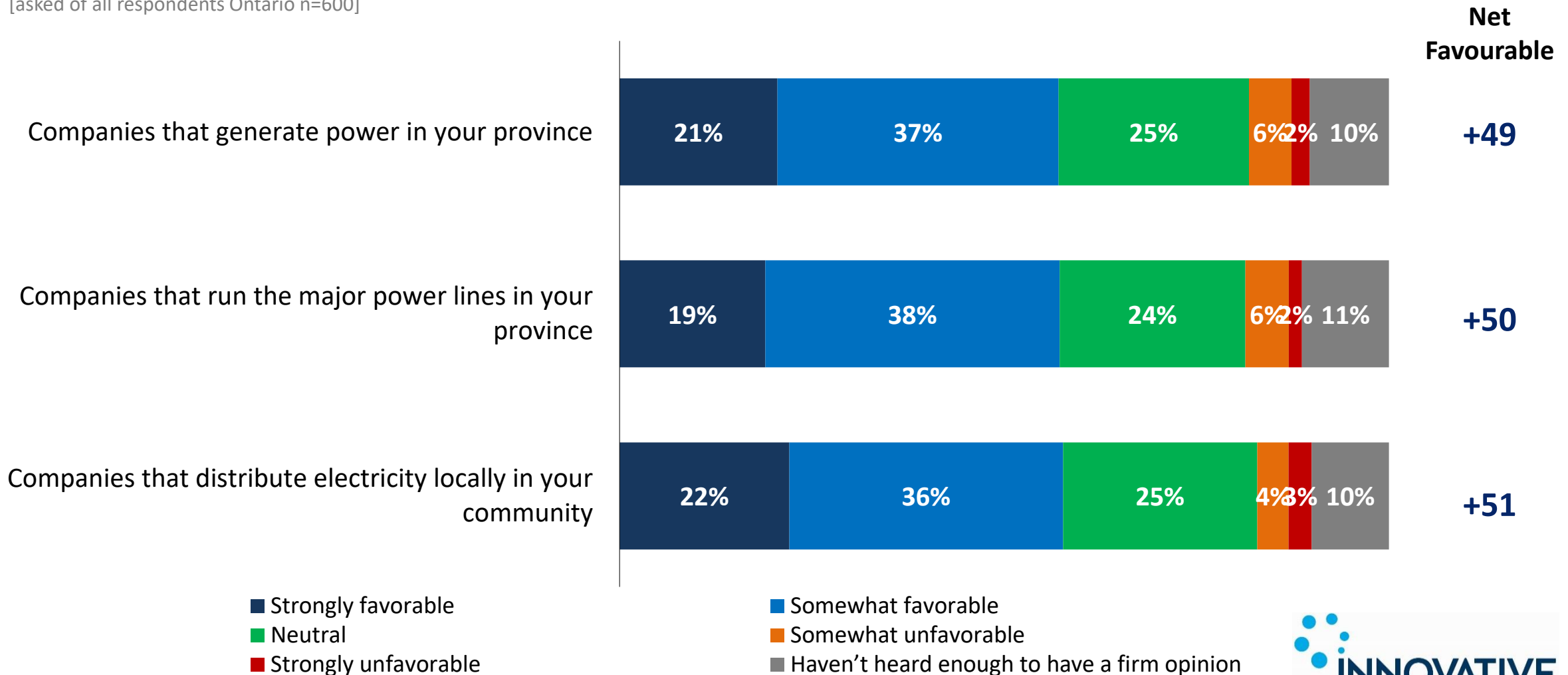
Sink or Swim Together

Ontarians do not draw strong distinctions between different kinds of electricity companies



Below is a list of organizations of various types in your province. For each organization, please indicate whether you have a favourable or unfavourable impression or if you haven't really heard enough about it to have a firm impression?

[asked of all respondents Ontario n=600]



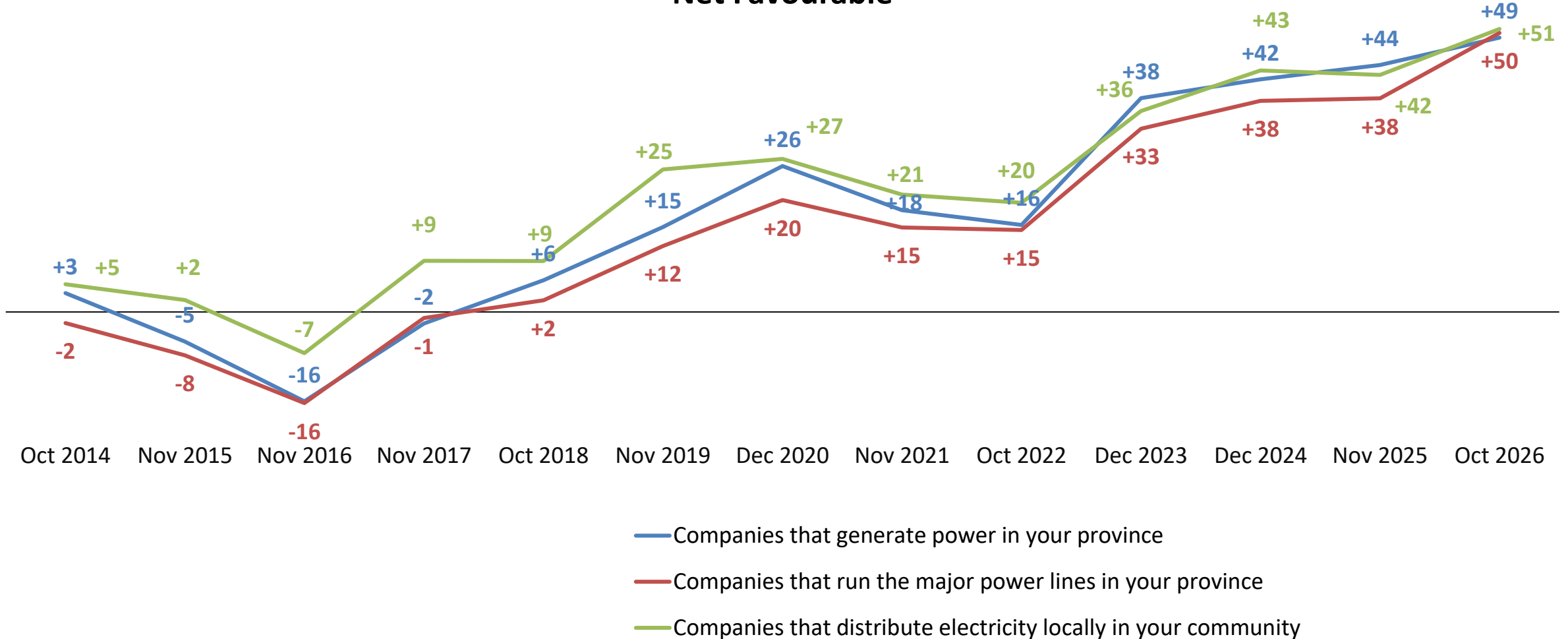
Ontarians' views of all sectors have improved significantly over the past decade



Below is a list of organizations of various types in your province. For each organization, please indicate whether you have a favourable or unfavourable impression or if you haven't really heard enough about it to have a firm impression?

[asked of all respondents Ontario 2026 n=600]

Net Favourable



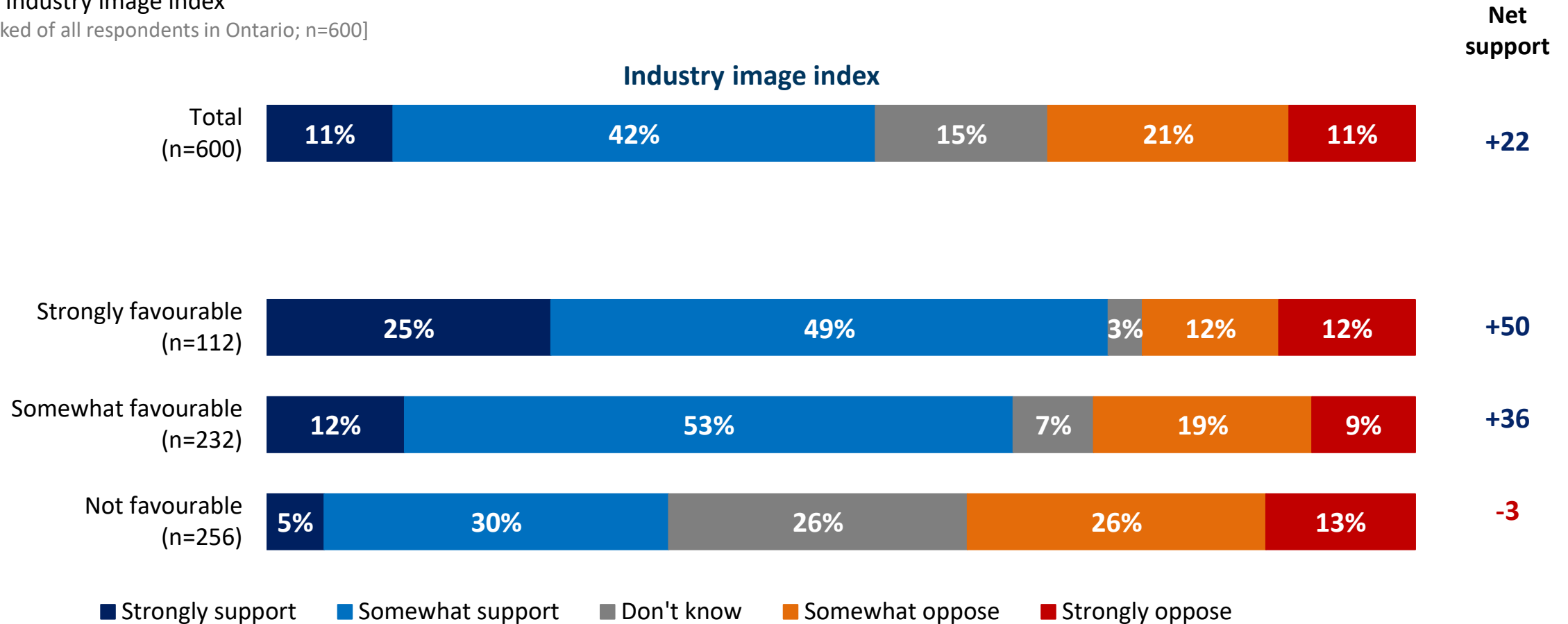
How Ontarians feel about electricity companies strongly impacts how willing they are to pay more



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**

BY Industry image index

[asked of all respondents in Ontario; n=600]



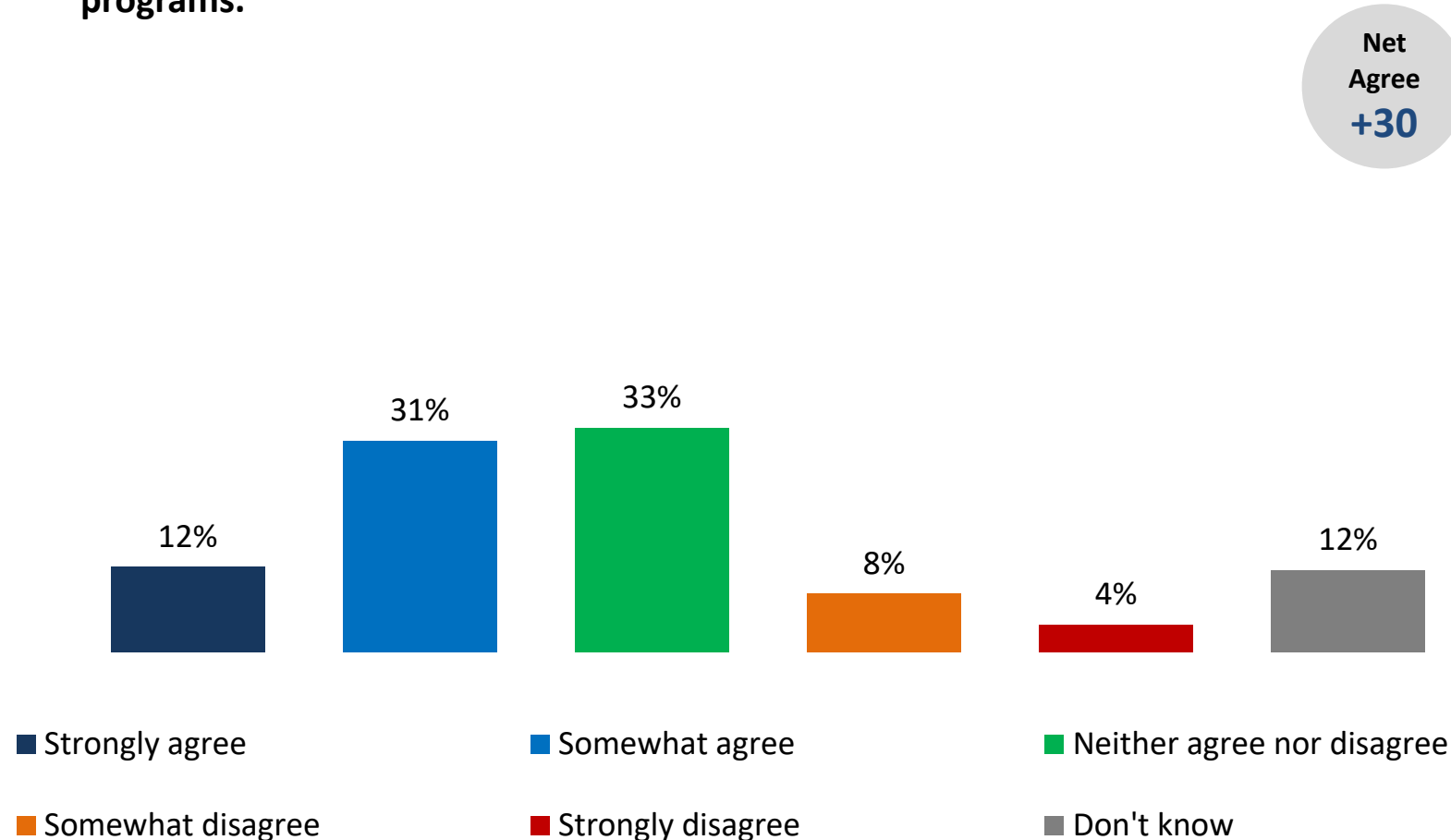
Less than half of Ontarians say it is easy to participate in conservation and efficiency programs



In general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

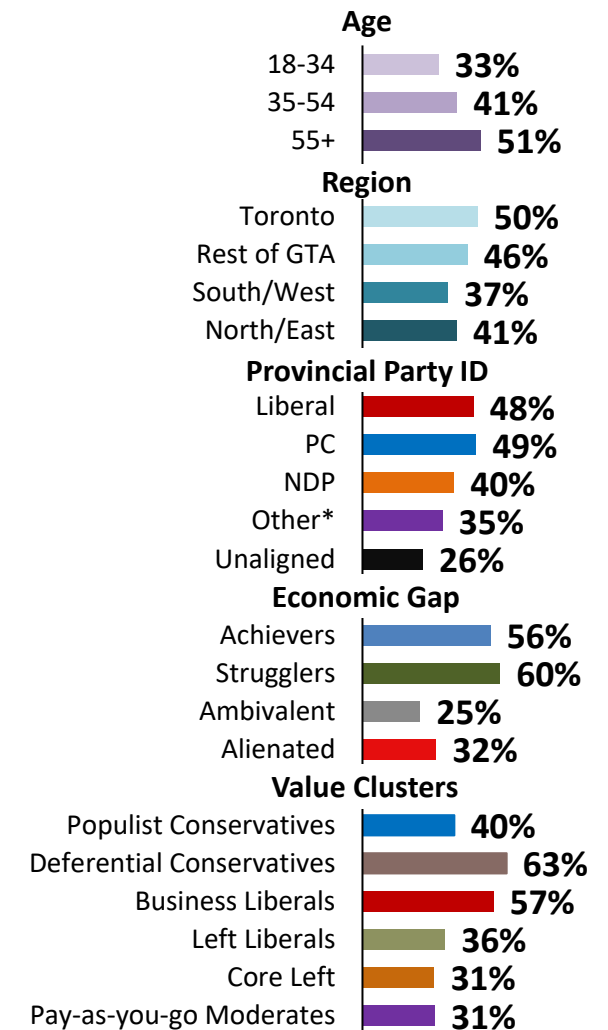
[asked of all respondents Ontario n=600]

The electricity sector makes it easy for me to participate in conservation and efficiency programs.



Segmentation

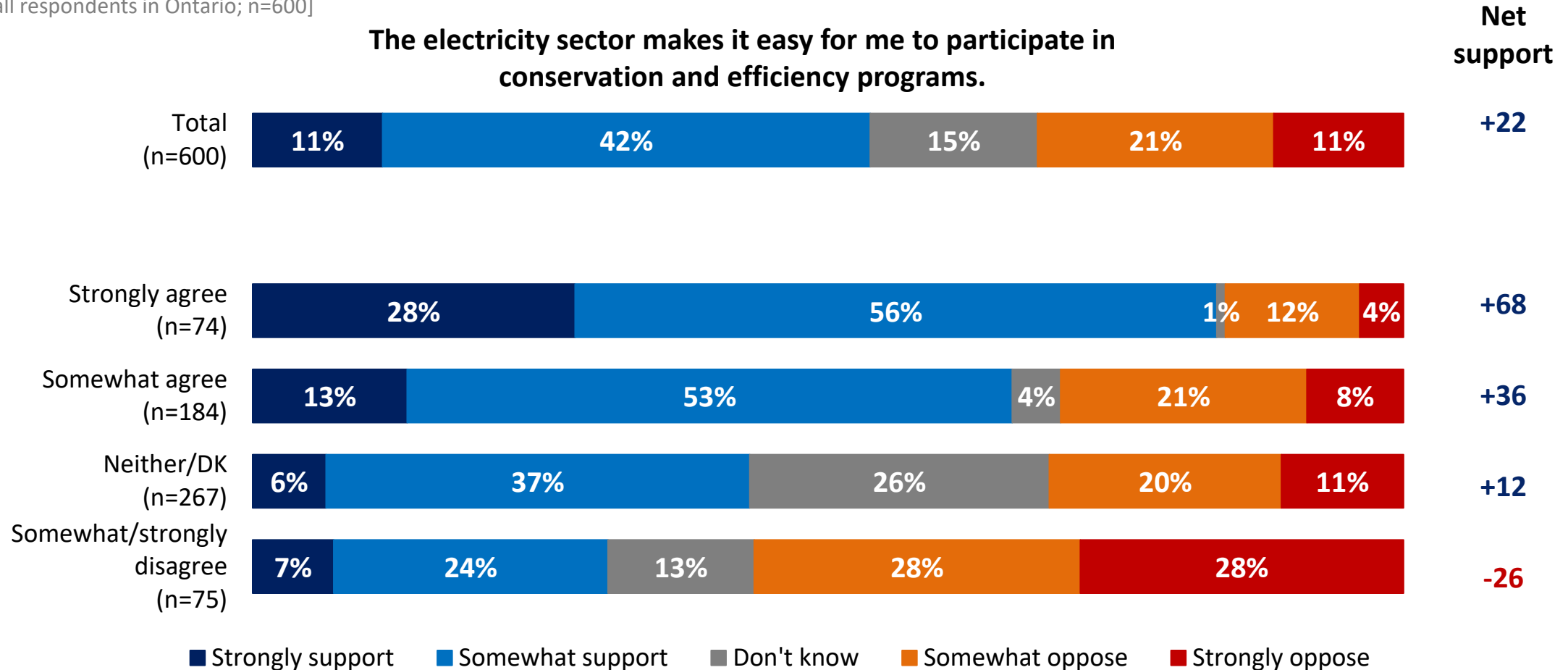
Those who say "Agree"



Those who say it is easy to participate in conservation and efficiency programs are more willing to pay



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**
 BY In general, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?
 [asked of all respondents in Ontario; n=600]



There has been a dramatic improvement in the share who feel they are treated as valued customers

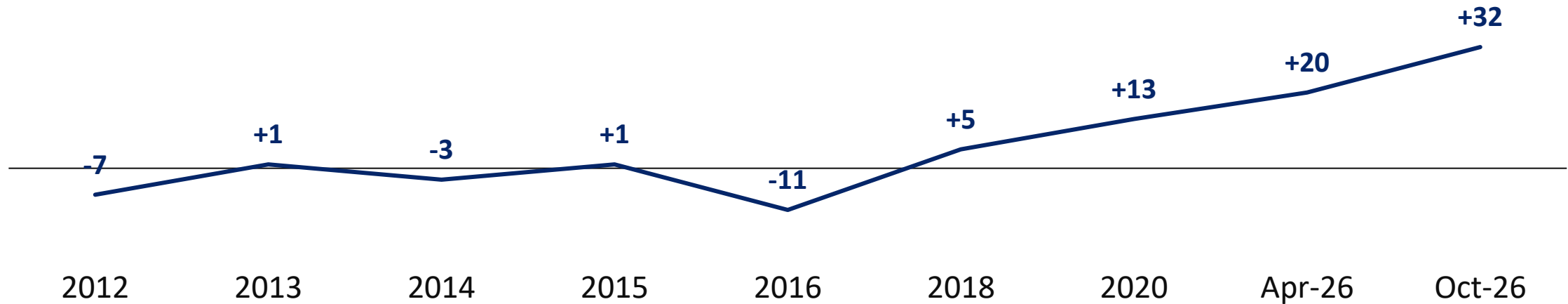


Thinking about the electricity companies in your province, would you agree or disagree with the following statements?

[asked of all respondents Ontario, n=598]

Net Agreement with:

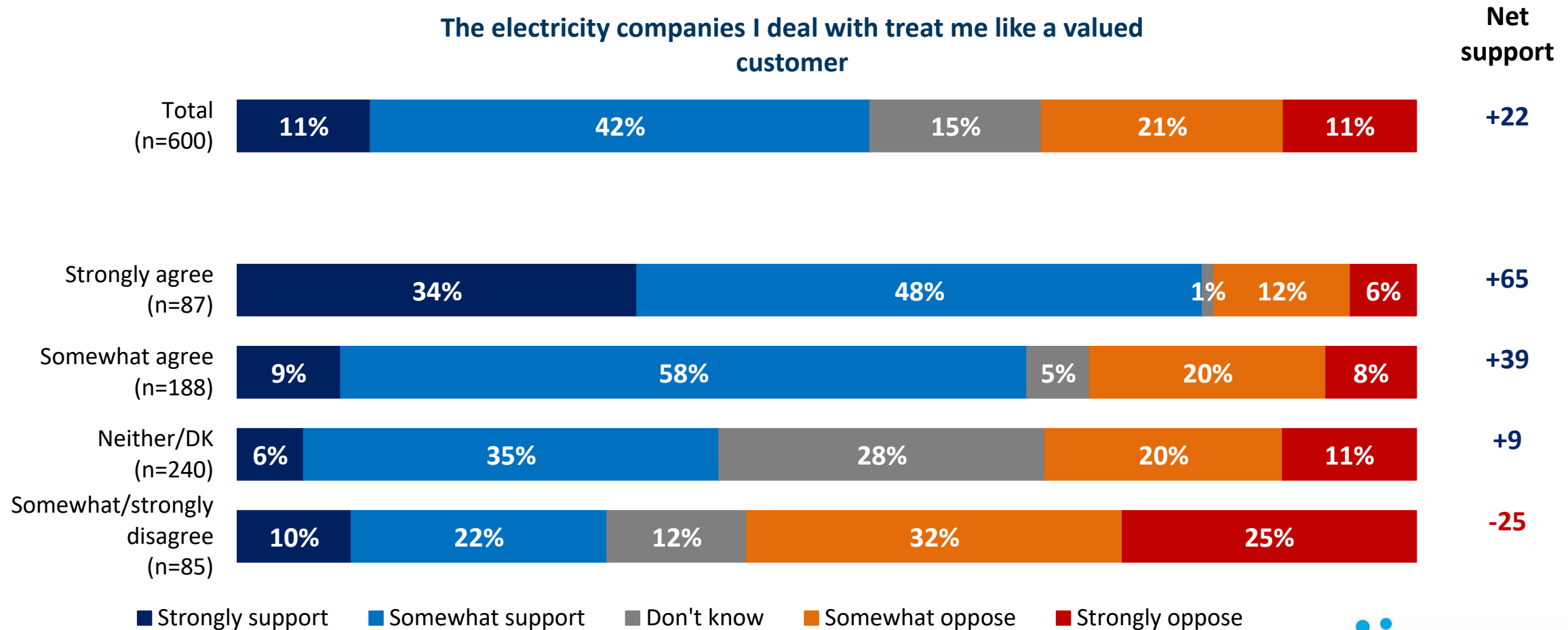
"The electricity companies I deal with treat me like a valued customer."



Those who say they feel valued as customers are more willing to pay



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**
 BY Thinking about the electricity companies in your province, would you agree or disagree with the following statements?
 [asked of all respondents in Ontario; n=600]



While Ontarians have always felt somewhat protected on reliability and quality, Net Agreement is up from our benchmark

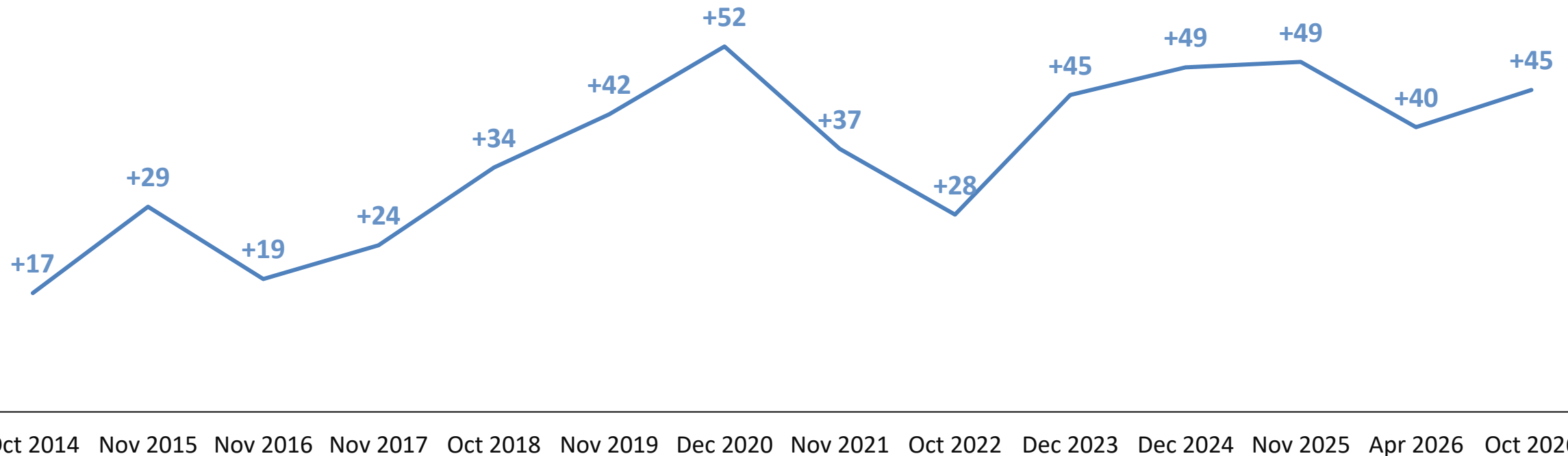


And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the reliability and quality of electricity service in my province.**

[asked of all respondents nationally, show Ontario response n=600]

Net Agreement with:

“Consumers are well protected **with respect to the reliability and quality** of electricity service in my province.”



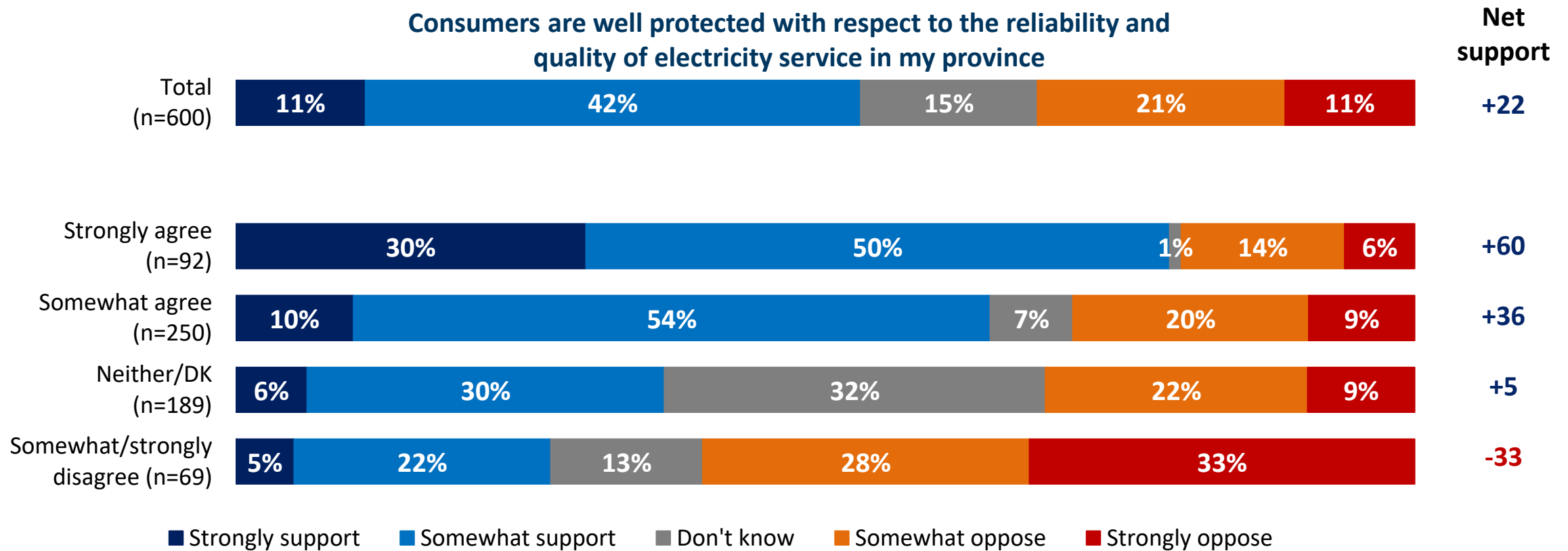
Note: Prior to 2017, “Neither agree nor disagree” was not provided as an answer.

Current data: October W1 2026

Feeling protected on reliability has a strong impact on willingness to pay



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**
 BY In general, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?
 [asked of all respondents in Ontario; n=600]



Confidence on price protection has flipped from deeply skeptical to somewhat confident

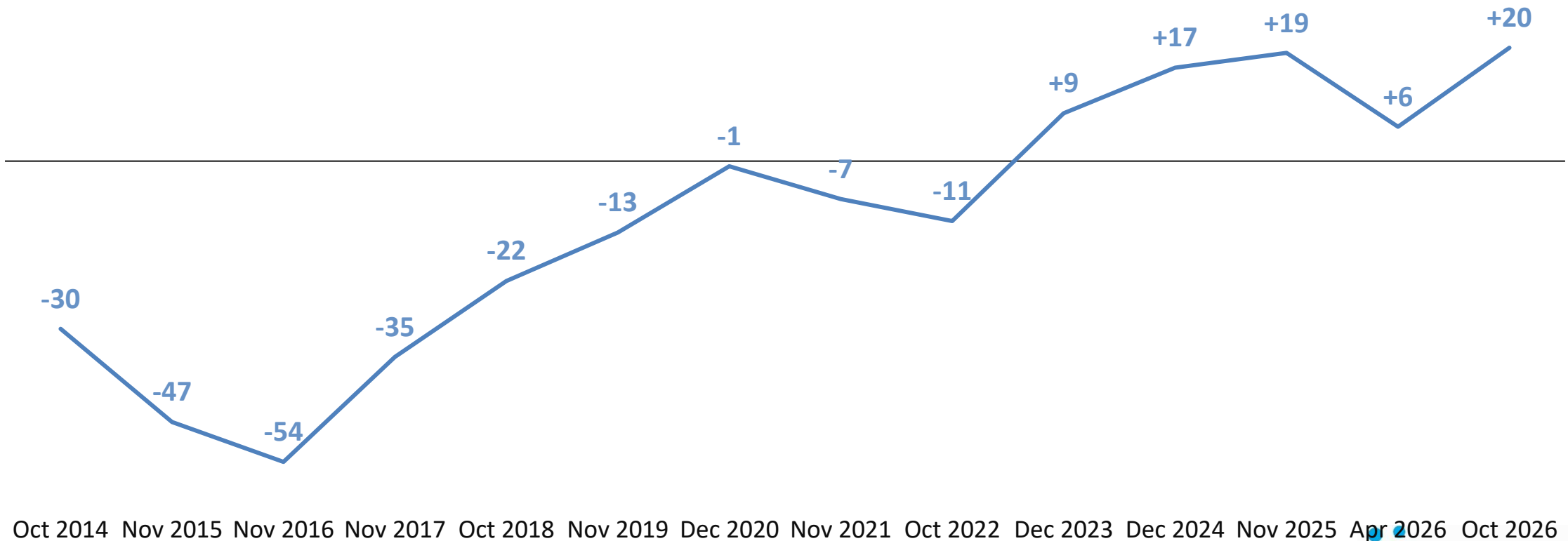


And, in general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements? **Consumers are well protected with respect to the price of electricity service in my province.**

[asked of all respondents nationally, show Ontario response n=600]

Net Agreement with:

"Consumers are well protected **with respect to the price** of electricity service in my province."



Note: Prior to 2017, "Neither agree nor disagree" was not provided as an answer.

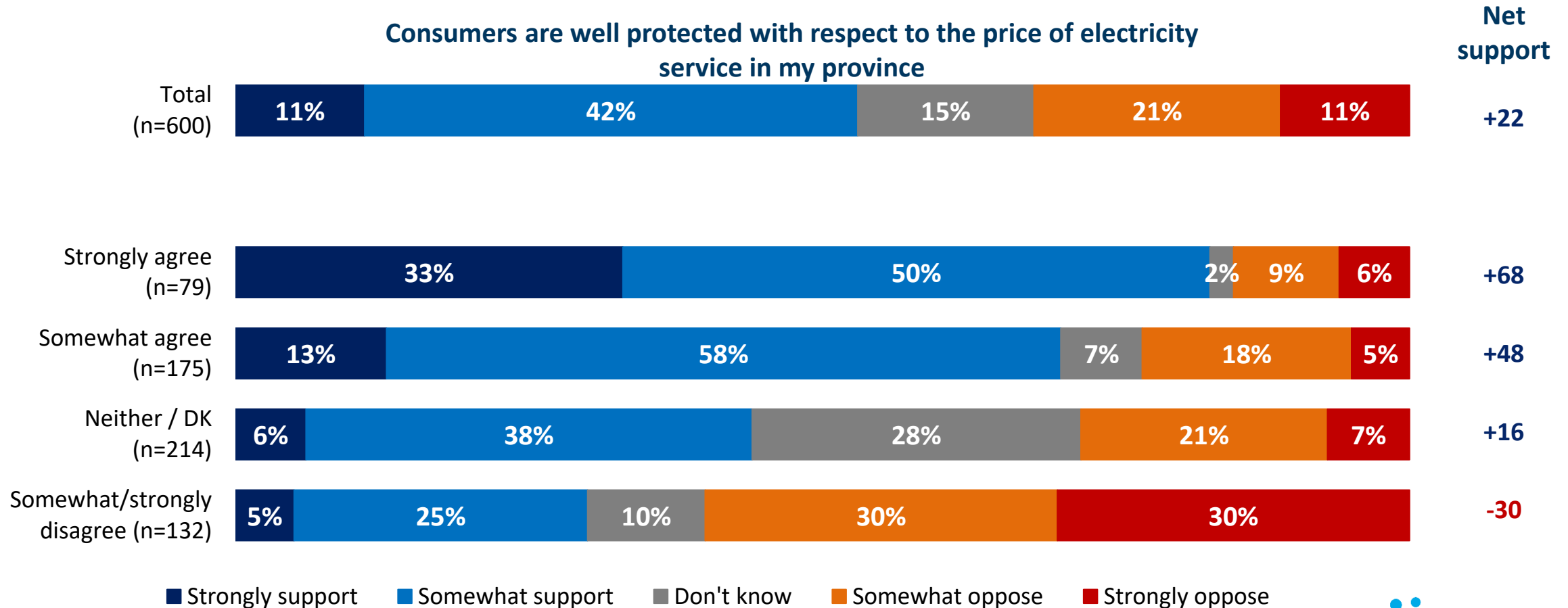
Current data: October W1 2026

Feeling protected on price also has a strong impact on willingness to pay



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**
 BY In general, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

[asked of all respondents in Ontario; n=600]



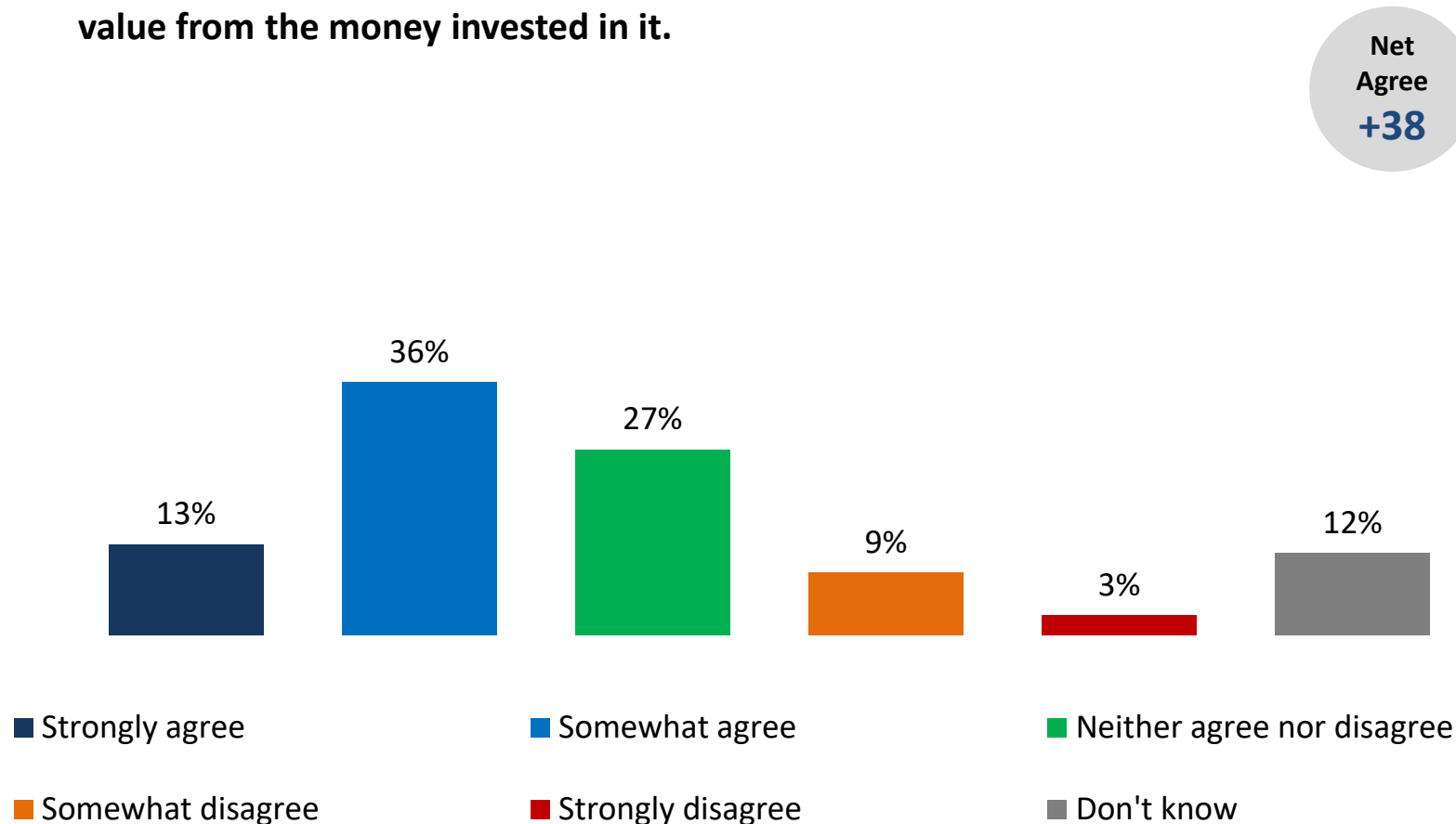
Just under half say electricity companies make good use of the system to provide value, but there is room for growth



In general do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

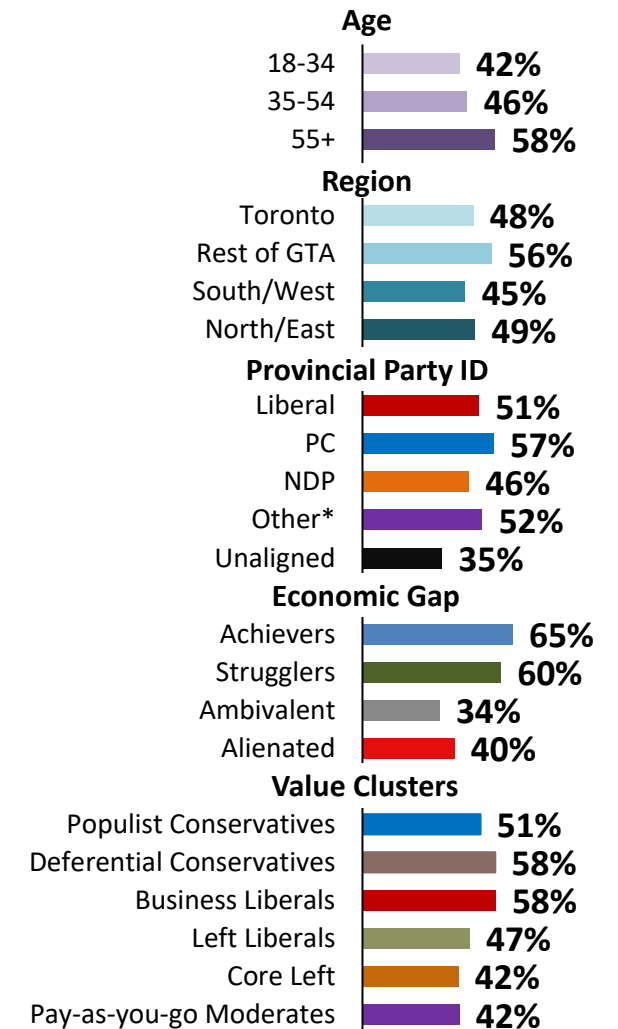
[asked of all respondents Ontario n=600]

Electricity companies make good use of the existing electricity system to get the most value from the money invested in it.



Segmentation

Those who say "Agree"



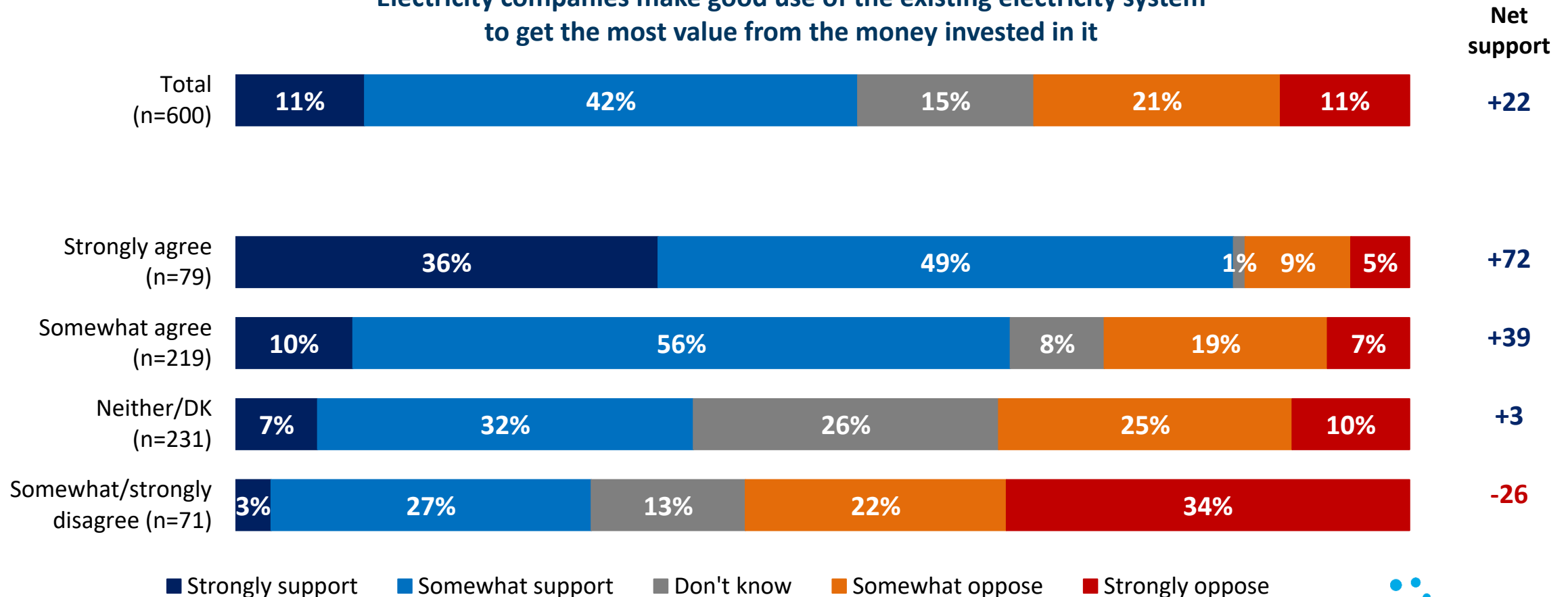
Willingness-to-pay BY Value From Existing System: Support for expansion is 85% among strongly agree with 'companies use existing assets well'



Do you support or oppose investments to expand the electricity grid if, in addition to routine increases, your electricity bill were to rise by: **Overall**
BY In general, do you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements?

[asked of all respondents in Ontario; n=600]

**Electricity companies make good use of the existing electricity system
to get the most value from the money invested in it**





Summary

Key Take-Aways

01

The Tariff Battle Has Helped to Create a Moment

While the most obvious impacts are in federal politics, the country has embraced the Build Baby Build Agenda.

02

This Moment Echoes in Provincial Politics

Although Doug Ford did not benefit as quickly or as strongly from the recent tariff dispute as he has in the past, Ontarians also want to see the provincial government respond to Trump by Building Stronger here and abroad

03

Electricity is Part of the Moment

Ontarians see this as a good time to invest in the electricity system to power a stronger future.

04

On Measure After Measure, the Electricity Sector is At or Near All-Time Highs

On industry favourables, reliability, perceptions of being a valued customer and price, consumers are more favourables today than at any other time in our tracking.

05

But There is No Blank Check.

Consumers are under pressure and new price increases will face resistance. What we hope these slides have shown is that there are many actions each and every one in this room can take to reinforce current strengths and earn support for the price increases to come.

INNOVATIVE. Building Understanding.

INNOVATIVE is about more than just collecting data. We have thought deeply about how opinion forms and changes both generally and in terms of specific challenges. We are here to support you at every step from design to execution to analysis of your research. We are focused on helping you apply these insights in the real world. We thrive on challenges and have the track record to prove it.



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Every brand has a unique DNA. Whether a new brand, a brand refresh, a new campaign, we bring fresh eyes and an innovative set of qualitative and quantitative approaches.

- **Brand Health & Tracking Research**
- **Unregulated Product & Service Development Strategy**
- **CSAT Benchmarking** (+LDC CSAT Scorecard)
- **Transactional Customer Service Research**

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- **Government Relations Research**
- **Policy Development Research**
- **Public Opinion Issue Tracking**
- **Understanding NIMBYism**
- **PAESS Scorecard Execution**

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- **Advertising Testing & Development**
- **Communications Campaign Impact Tracking**

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Engaging busy people in meaningful consultation on topics that are important, but not of everyday interest is a tough challenge. INNOVATIVE has a proven track record of creating representative consultations that generate wide engagement and actionable results.

- **Rate Application Customer Engagement**
- **Community Engagement**
- **Locally Unwanted Land Use (LULU) Risk Mitigation**

For more information on INNOVATIVE's research services, please contact one of our experts.

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Appendices

Methodology

Survey Methodology | National September W1-2 2026



These are the results of an online survey conducted between September 4, 2026, and September 15, 2026.

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 samples. 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=2,010 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

Field Dates: September 4, 2026 to September 15, 2026

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote 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	195	9.7%	130	13.1%
Men 35-54	283	14.1%	157	15.7%
Men 55+	465	23.2%	193	19.4%
Women 18-34	211	10.5%	131	13.1%
Women 35-54	324	16.2%	166	16.6%
Women 55+	526	26.2%	220	22.1%
British Columbia	423	21.0%	139	13.9%
Alberta	337	16.8%	112	11.2%
Prairies	106	5.3%	66	6.6%
Ontario	602	30.0%	386	38.6%
Québec	437	21.7%	230	23.0%
Atlantic	105	5.2%	67	6.7%

Survey Methodology | Ontario, October W1 2026



These are the results of an online survey conducted between October 02 to October 06, 2026.

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=641 general population, 18 years or older. The results are weighted to n=600 based on Census data from Statistics Canada.

Field Dates: October 02 to October 06, 2026.

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	72	11.3%	85	14.2%
Men 35-54	91	14.3%	90	15%
Men 55+	148	23.2%	113	19%
Women 18-34	66	10.3%	80	13.4%
Women 35-54	104	16.3%	98	16.5%
Women 55+	157	24.6%	130	21.8%
Toronto	126	19.7%	122	20.3%
Rest of GTA	153	23.9%	157	26.1%
South/West	183	28.5%	157	26.2%
North/East	179	27.9%	164	27.4%

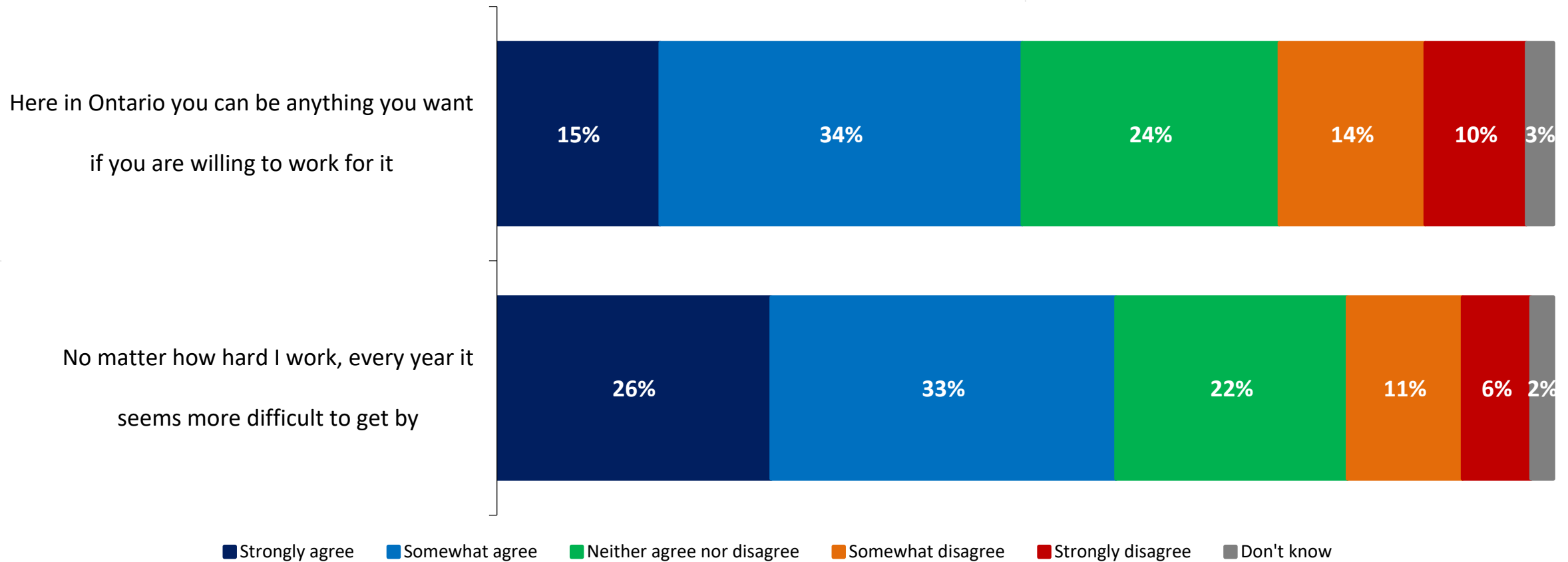
Economic Gap

Economic Gap Segmentation: About half (50%) say you can be anything you want; 59% say it's more difficult to get by every year



Do you agree or disagree with the following statements?

[asked of all respondents in Ontario; n=600]



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

Economic Gap Segmentation (ON): Ontarians are almost equally split between four economic segments, around 1-in-4 belonging to each



Gap segmentation: Agree with 'Here in [your province] 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 nationally; n=600]

Alienated

Locked out and let down on every front

Reject the idea that opportunity exists and firmly believe hard work no longer pays off.

Ambivalent

Checked out from the system

Neither convinced that opportunity exists nor that hard work is futile.

Achievers

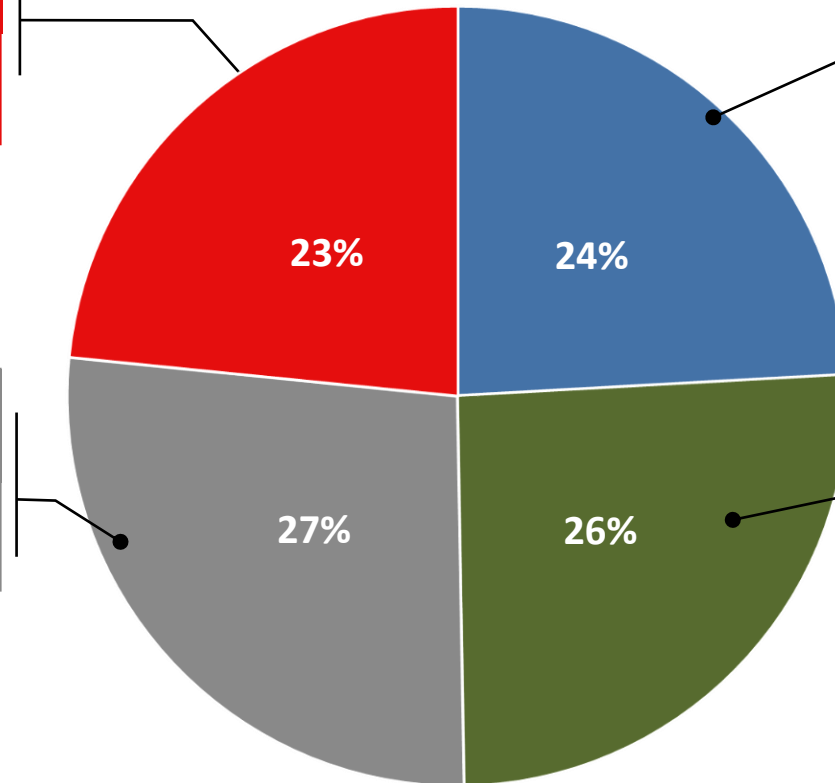
The system is working for them

Believe opportunity exists in their province and feel confident that hard work still pays off.

Strugglers

Getting ahead is becoming increasingly hard

Believe opportunity exists in principle, but feel that no matter how hard they work, getting ahead is becoming increasingly out of reach.

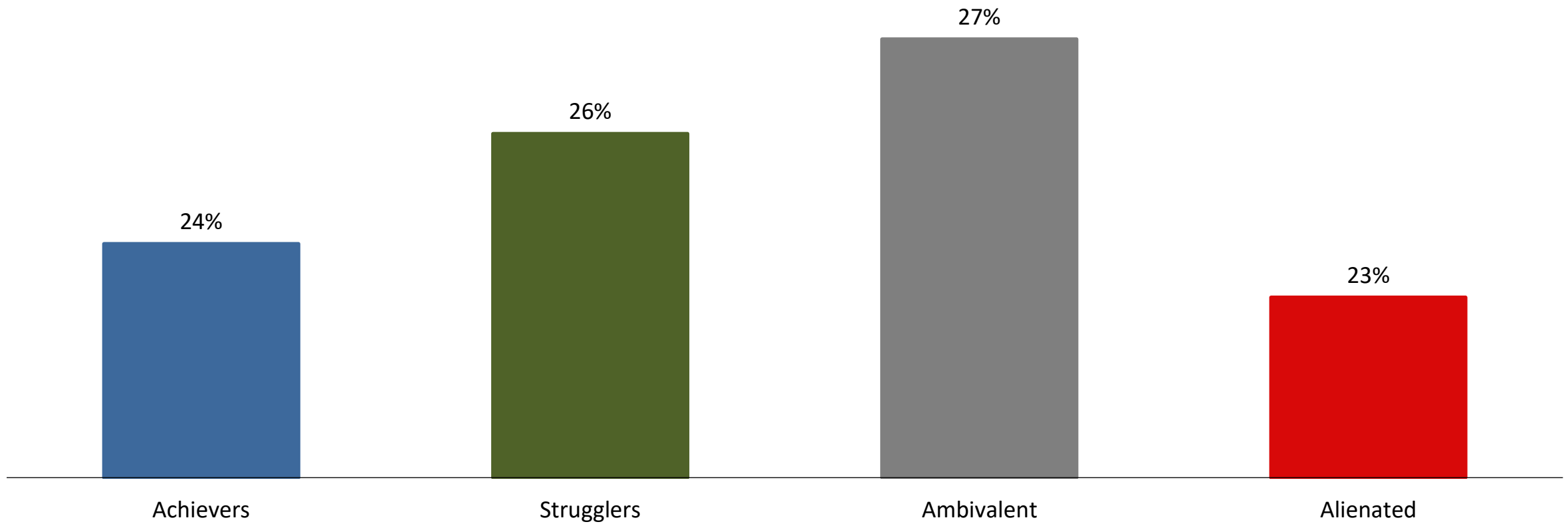


Economic Gap Segmentation: Ontarians are broadly divided across economic gap segments, led by Ambivalent (27%)



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 in Ontario; n=600]



Economic Gap Segmentation Attitudes



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

Attitudes BY Economic Gap Segmentation		Total	Achievers	Strugglers	Ambivalent	Alienated
		(n=600)	(n=145)	(n=154)	(n=161)	(n=140)
Here in [PROV] you can be anything you want if you are willing to work for it.	Strongly agree	15%	29%	33%	0%	0%
	Somewhat agree	34%	71%	67%	0%	0%
	Neither agree nor disagree	24%	0%	0%	91%	0%
	Somewhat disagree	14%	0%	0%	0%	59%
	Strongly disagree	10%	0%	0%	0%	41%
	Don't know	3%	0%	0%	9%	0%
No matter how hard I work, every year it seems more difficult to get by	Strongly agree	26%	0%	38%	16%	51%
	Somewhat agree	33%	0%	62%	35%	31%
	Neither agree nor disagree	22%	43%	0%	33%	12%
	Somewhat disagree	11%	33%	0%	7%	5%
	Strongly disagree	6%	23%	0%	3%	1%
	Don't know	2%	2%	0%	6%	0%

Note: Current data: October W1 2026, Ontario

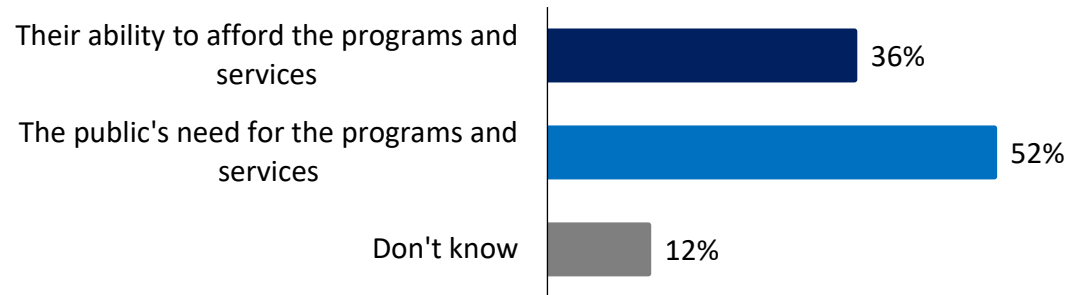
Decided Vote by Economic Gap: About half of Achievers (48%), Strugglers (52%), and Ambivalent (49%) all vote Progressive Conservative

		Economic Gap			
		Achievers	Strugglers	Ambivalent	Alienated
		(n=137)	(n=145)	(n=116)	(n=118)
Provincial Decided Vote	Liberal	34%	33%	25%	29%
	Progressive Conservative	48%	52%	49%	36%
	NDP	9%	13%	18%	26%
	Green	8%	3%	3%	5%
	Other	1%	0%	4%	5%

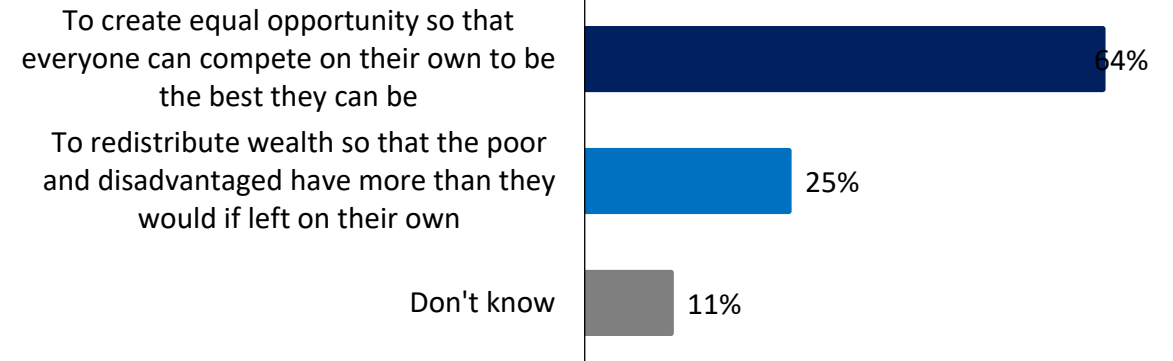
Value Clusters

Core Political Values: 64% say government's role is to create equal opportunity, 52% prioritize the public's need for services

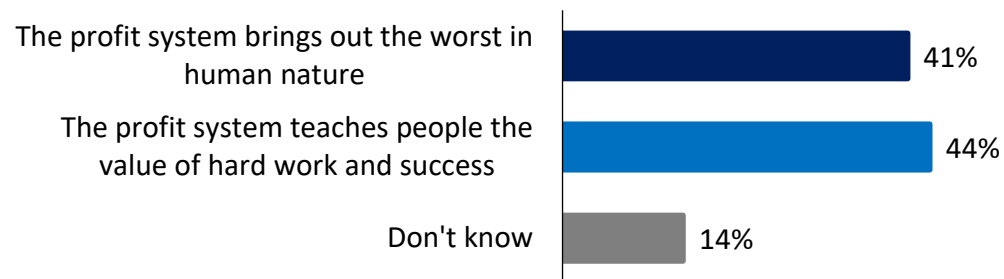
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?
[asked of all respondents in Ontario; n=600]



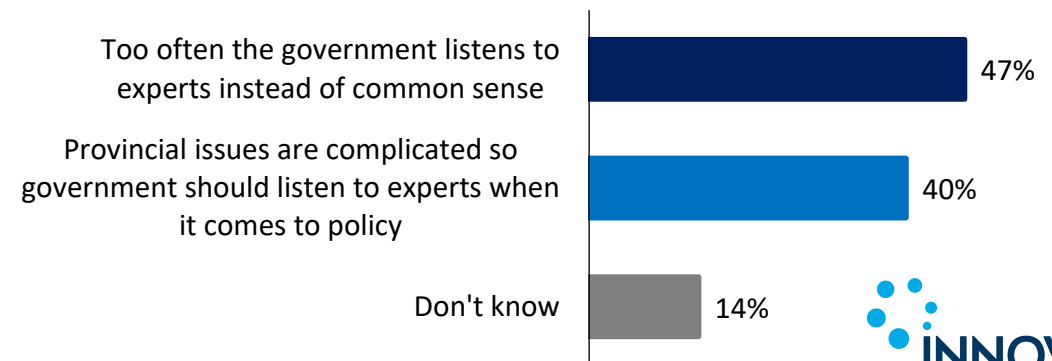
Q Is the main role of government to...?
[asked of all respondents in Ontario; n=600]



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



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

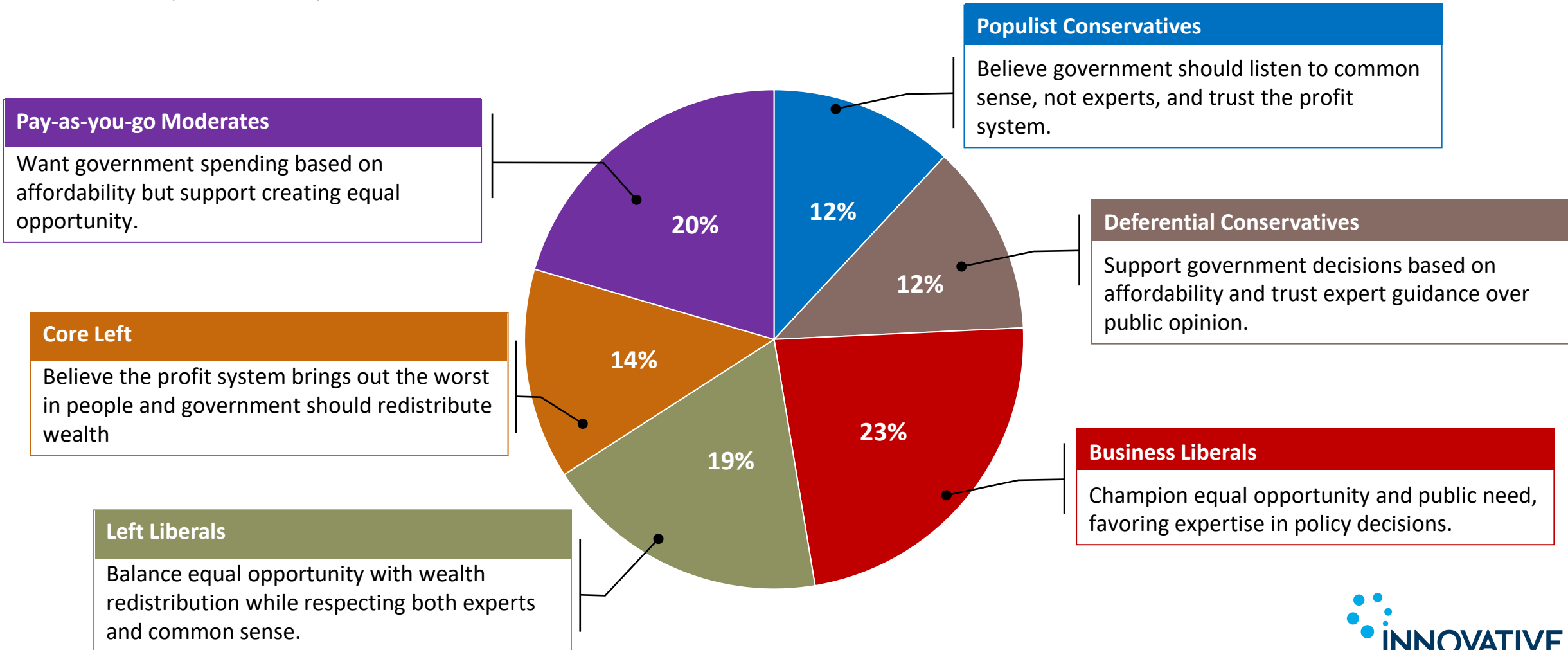


Value clusters (ON): Nearly 1-in-4 Ontarians are Business Liberals, while 1-in-5 are Pay-as-you-go Moderates⁶⁹



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 nationally; n=600]



Defining Value Clusters: Conservatives prioritize affordability and hard work, while the Core Left favours redistribution and public need

Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
Governments should base decisions on...	Ability to afford	87%	92%	0%	0%	0%	69%
	Public Need	0%	0%	97%	93%	91%	0%
Is the main role of government to...?	Create equal opportunity	99%	73%	74%	97%	0%	40%
	Redistribute wealth	0%	18%	21%	0%	93%	27%
When it comes to government decision making...	Rely on common sense	100%	0%	39%	58%	34%	51%
	Listen to experts	0%	95%	48%	36%	50%	17%
The profit system...	Brings out the worst in human nature	0%	0%	0%	88%	92%	61%
	Teaches value of hard work and success	89%	88%	91%	0%	0%	8%

Combined Vote by Value Cluster: PCs lead in both Conservative clusters; Liberals lead among the Core Left (41%)

Provincial Combined Vote	Value Clusters					
	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
	(n=72)	(n=74)	(n=139)	(n=111)	(n=82)	(n=123)
Liberal	12%	33%	28%	28%	41%	17%
Progressive Conservative	66%	46%	43%	32%	10%	45%
NDP	0%	12%	10%	21%	27%	11%
Green	2%	1%	4%	4%	7%	4%
Other	11%	0%	3%	1%	1%	0%
Undecided/DK	8%	9%	9%	11%	13%	15%
Would not vote/None	1%	0%	3%	2%	2%	7%

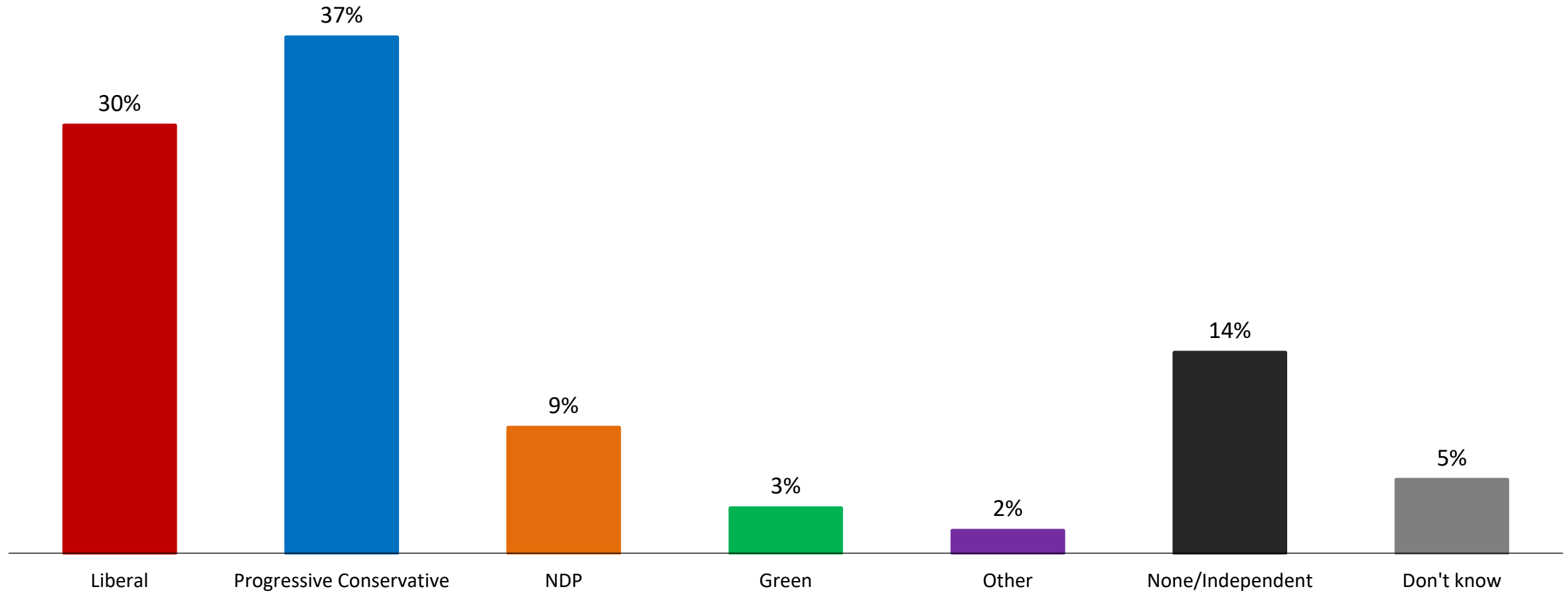
Party ID

Ontario Provincial Party ID: 37% see themselves as Conservative and 30% as Liberal, with NDP a distant third (9%)



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

[asked of all respondents; n=600]



Federal Party ID: Canadians almost equally identify as Conservative (31%) and Liberals (30%); 15% are independent



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

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

