



Public Opinion Research

Ontario Election: May Polling Wave 4

Vote, Leadership and Final Debate

Field Dates: May 27th (immediately following the final debate) to May 29th, 2018

Sample Size: n=800

Methodology

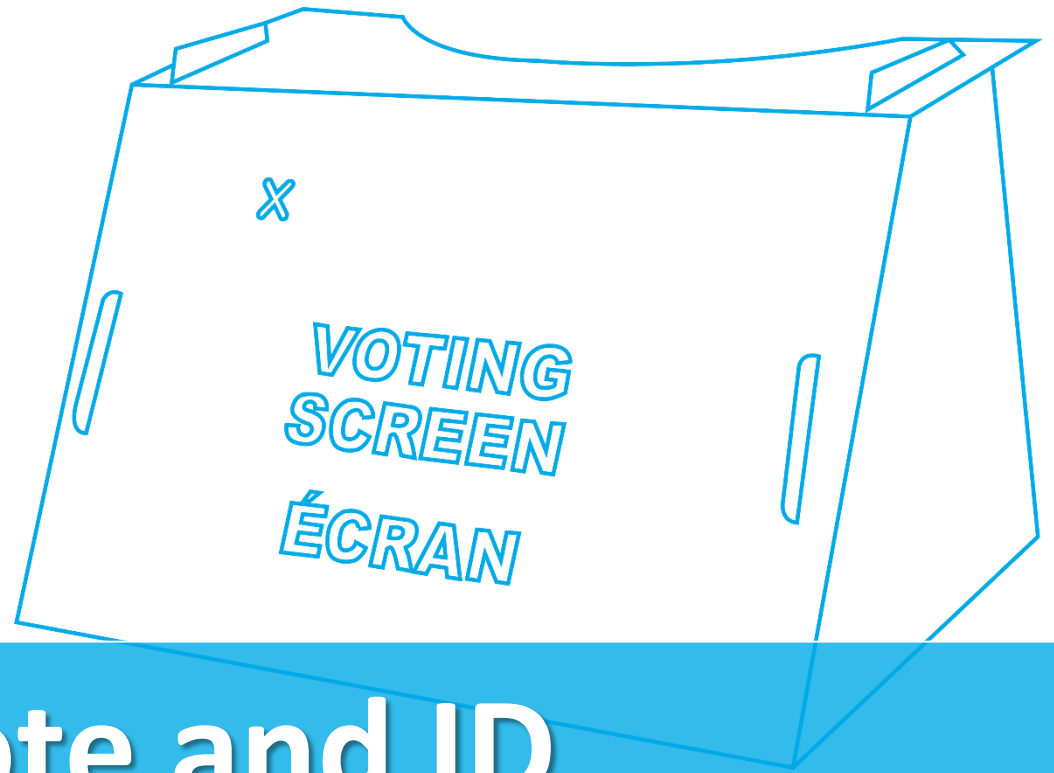
- These are the findings of a special Innovative Research Group (INNOVATIVE) online poll conducted from May 27th (immediately following the final debate) to May 29th, 2018 with tracking drawn from our monthly Canada This Month surveys.
- This online survey of 958 adult Ontarians was conducted on INNOVATIVE's Canada 20/20 national research panel with additional respondents from Léger, a leading provider of online sample. The sample is weighted to n=800 based on Census data from Statistics Canada.
- The panels are recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
- This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. The Marketing Research and Intelligence Association prohibits statements about margins of sampling error or population estimates with regard to most online panels.
- **NOTE:** References to May 2018 Wave 1 refer to our May 2018 Canada this Month survey in field from May 7th to May 9th, with a weighted sample of n=915 respondents. References to May 2018 Wave 2 refer to our first special online poll in field from May 9th to May 12th, with a weighted sample of n=1,500 respondents. References to May 2018 Wave 3 refer to our online poll from May 18th to May 23rd with a weighted sample of n=1,050. The current wave of results is referred to as May 2018 Wave 4.

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

Ontario Weights: Age, gender, and region

Results for Ontario are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported below.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	88	9.2%	110	13.7%
Males 35-54	149	15.6%	147	18.3%
Males 55+	253	26.4%	128	16.0%
Females 18-34	119	12.4%	112	14.0%
Females 35-54	127	13.3%	155	19.4%
Females 55+	222	23.2%	149	18.6%
Toronto	241	25.2%	168	20.9%
Rest of GTA	212	22.1%	202	25.3%
South/West	245	25.6%	210	26.2%
North/East	260	27.1%	221	27.6%



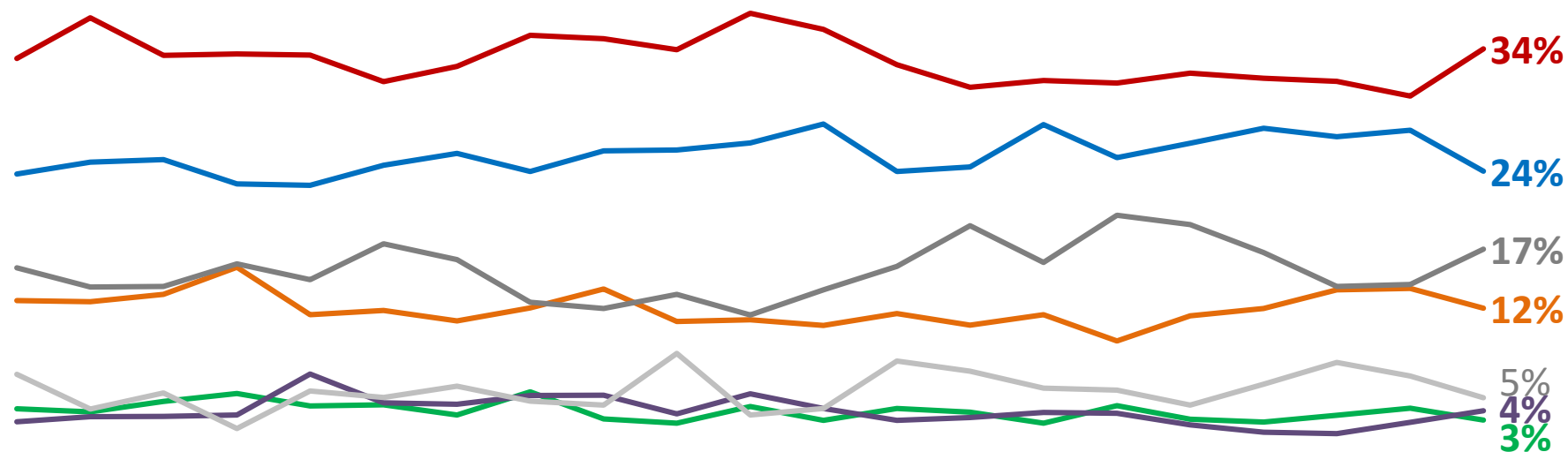
Provincial Vote and ID

Provincial ID: Gap increases as Liberal partisanship rises and PC partisanship declines



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

[asked of all respondents; n=800]



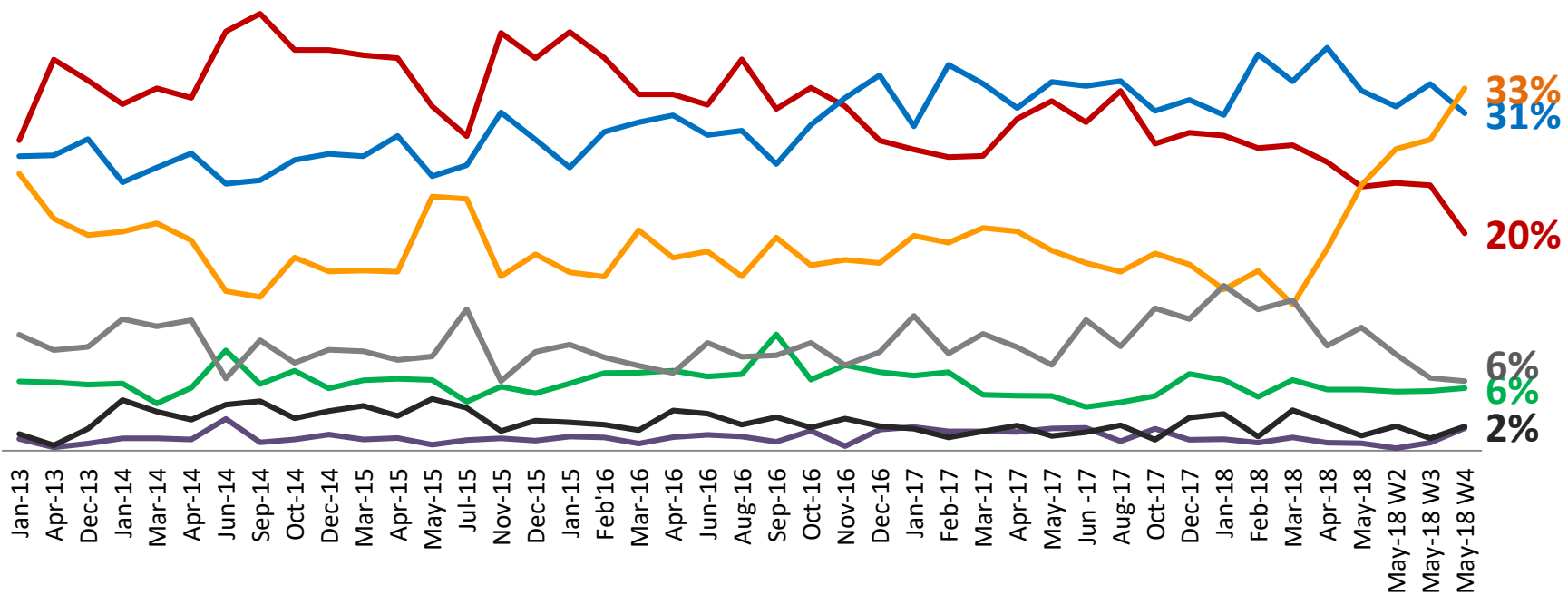
Sep '14 Dec '15 Mar '16 Sep '16 Jan '17 Feb '17 Mar '17 Apr '17 May '17 Jun '17 Aug '17 Oct '17 Dec '17 Jan '18 Feb '18 Mar '18 Apr '18 May '18 May '18 W2 May '18 W3 May '18 W4

- Liberal
- Progressive Conservative
- NDP
- Green
- Something else
- None/Independent
- Don't know

Combined Vote Tracking: NDP now have an edge over PCs, while Liberal vote continues to decline



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=800]



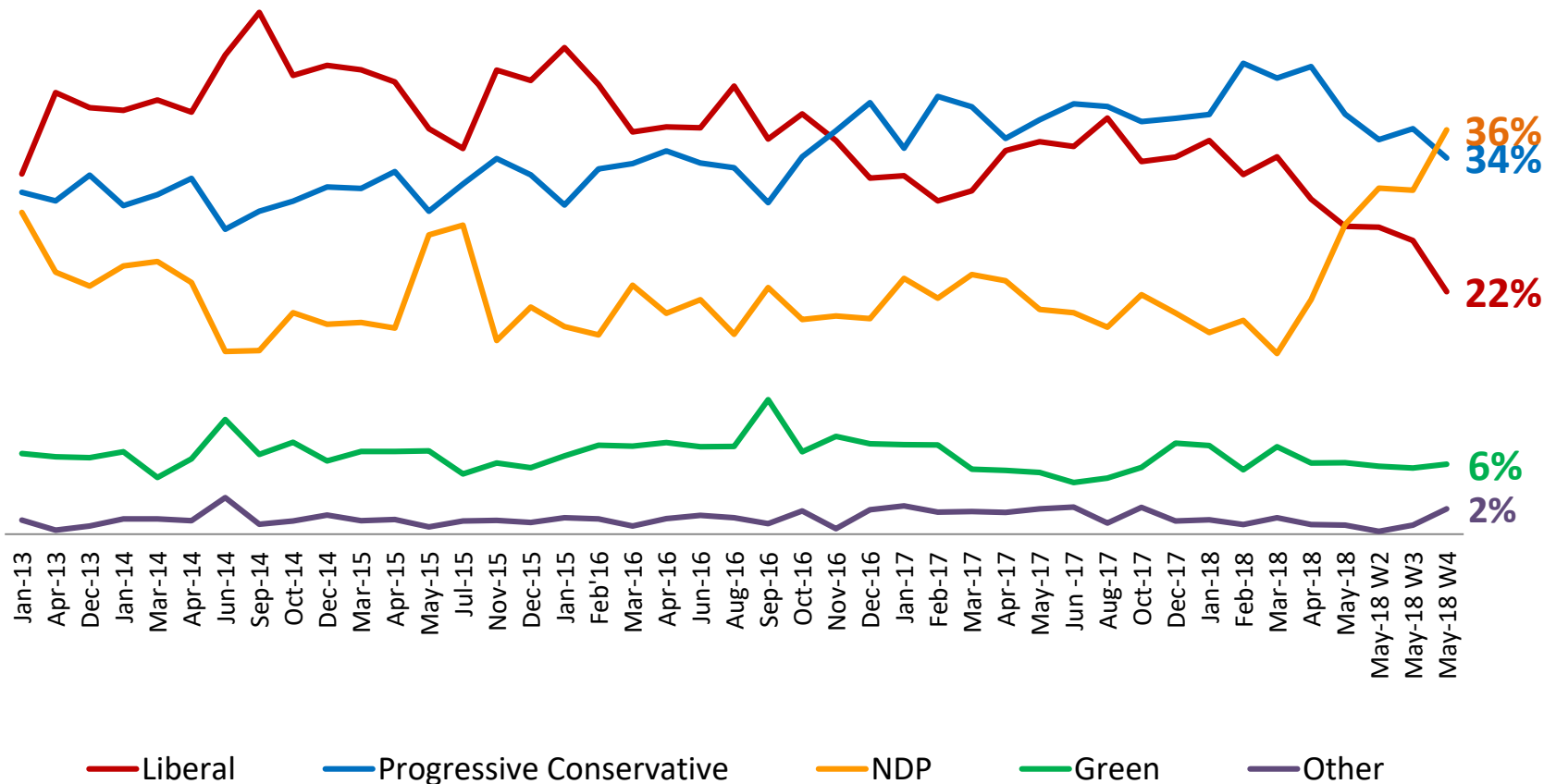
- Liberal
- Progressive Conservative
- NDP
- Green
- Other
- Undecided DK
- Would not vote/ None

Decided Vote Tracking: NDP vote continues to grow, while PC and Liberal support declines post-debate



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]**

[showing all decided voters; n=732]



Decided Vote by Region: NDP ahead of PCs in 3 out of 4 regions of the province

Decided Vote by Region

		Region			
		Toronto (n=148)	Rest of GTA (n=189)	South/West (n=196)	North/East (n=199)
Decided Vote	Liberal	24%	26%	15%	22%
	PC	28%	35%	37%	33%
	NDP	39%	32%	40%	35%
	Green	7%	5%	6%	7%
	Other	2%	2%	2%	3%

Combined Vote by Party ID: Loyalty is strongest among NDP partisans; weakest among Liberals

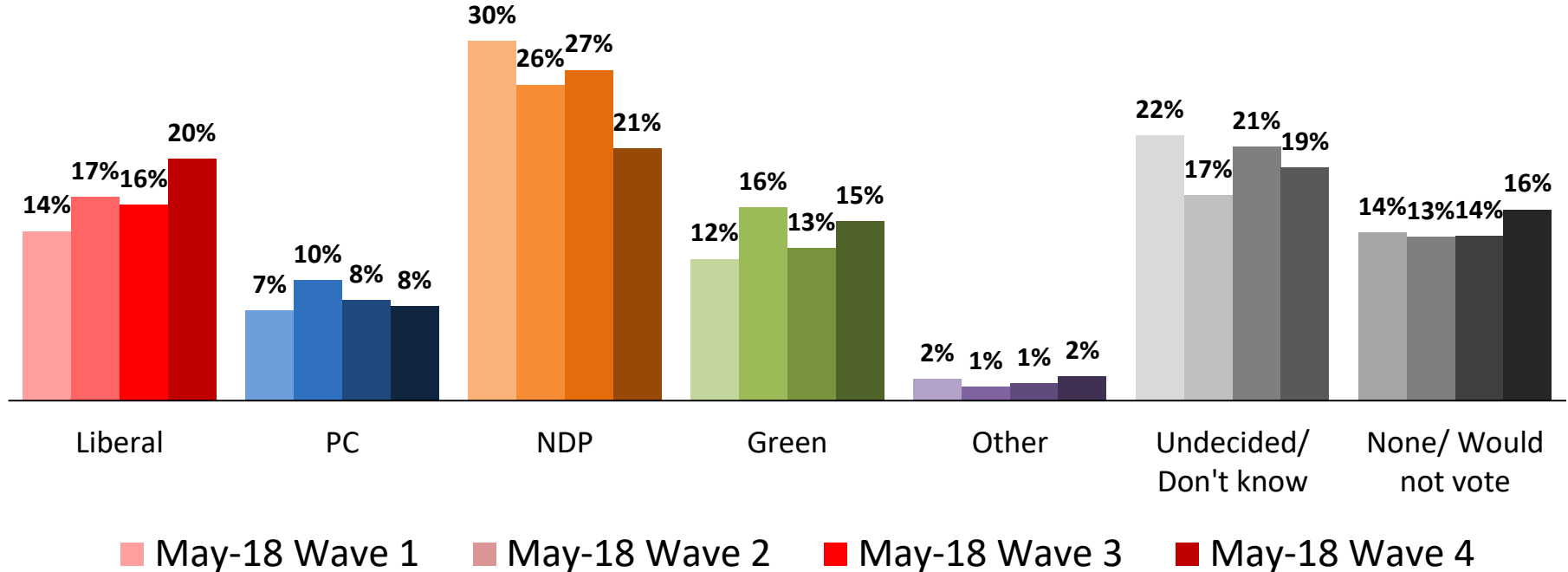
Combined Vote by Party ID

		Party ID				
		Liberal	Progressive Conservative	NDP	Green/Other	Unaligned
Combined Vote	Liberal	45%	3%	7%	10%	9%
	PC	13%	77%	4%	31%	23%
	NDP	34%	11%	84%	18%	32%
	Green	4%	1%	3%	28%	8%
	Other	1%	3%	1%	5%	3%
	Undecided/DK	3%	3%	1%	4%	18%
	Would not vote/None	0%	1%	1%	4%	7%

2nd Choice: Liberals neck-and-neck with NDP as second choice party



And which party would be your second choice?
[asked of all respondents who have a vote choice; n=732]



2nd Choice by Vote: Liberal and NDP voters more likely to choose Green Party over PCs as their second choice

Second choice vote by combined vote (first choice)

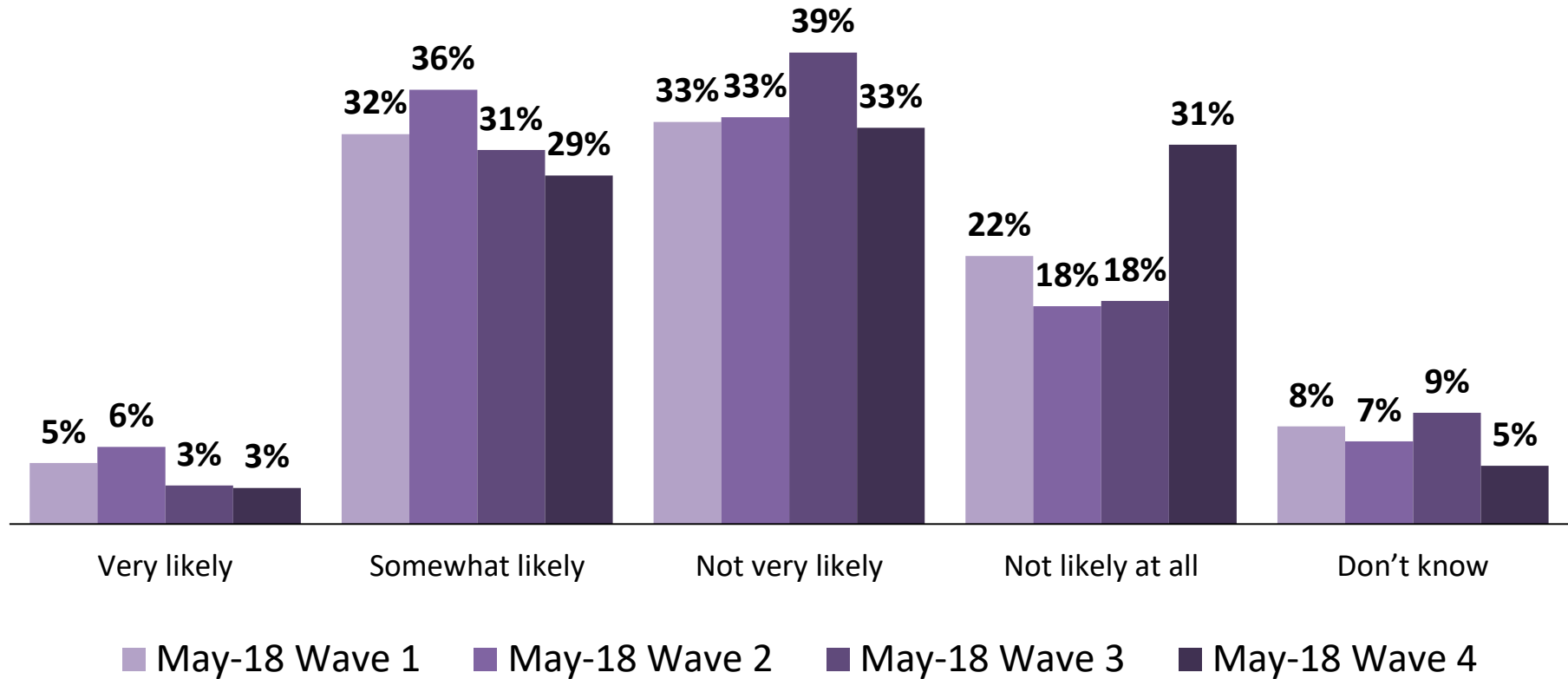
		Combined Vote			
		Liberal	Progressive Conservative	NDP	Green/Other
Second Choice	Liberal	N/A	10%	43%	12%
	PC	14%	N/A	10%	13%
	NDP	51%	21%	N/A	33%
	Green	15%	9%	22%	4%
	Other	0%	3%	0%	8%
	Undecided/DK	11%	26%	18%	16%
	Would not vote/None	9%	31%	6%	14%

Voting for Second Choice: Almost two-thirds (64%) say it is unlikely they will vote for their second choice



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

[asked of all respondents who have a second choice; n=476]

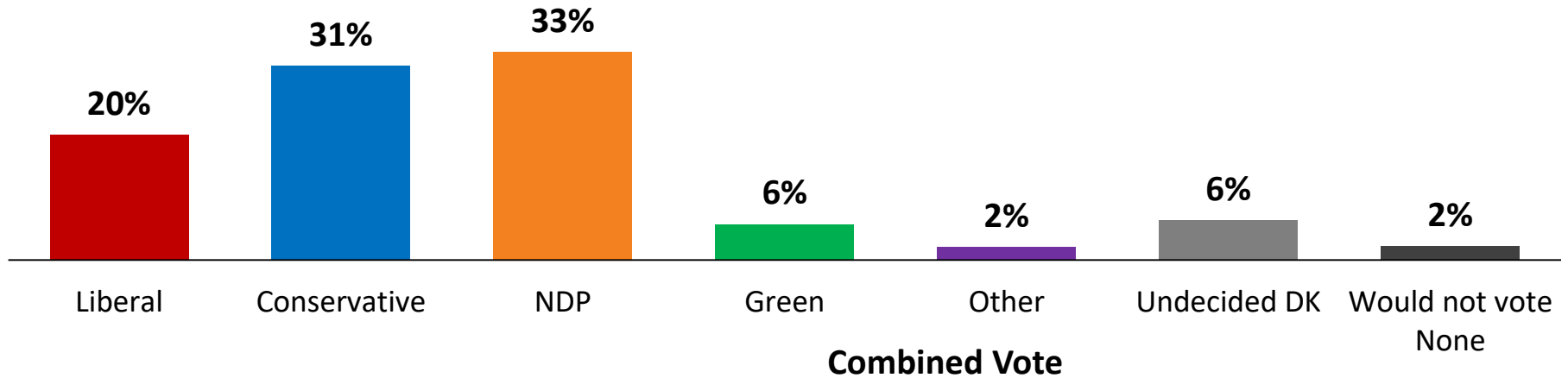


Likelihood by Vote: NDP voters are least likely to switch; Liberal supporters most likely to do so

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=800]



Combined Vote

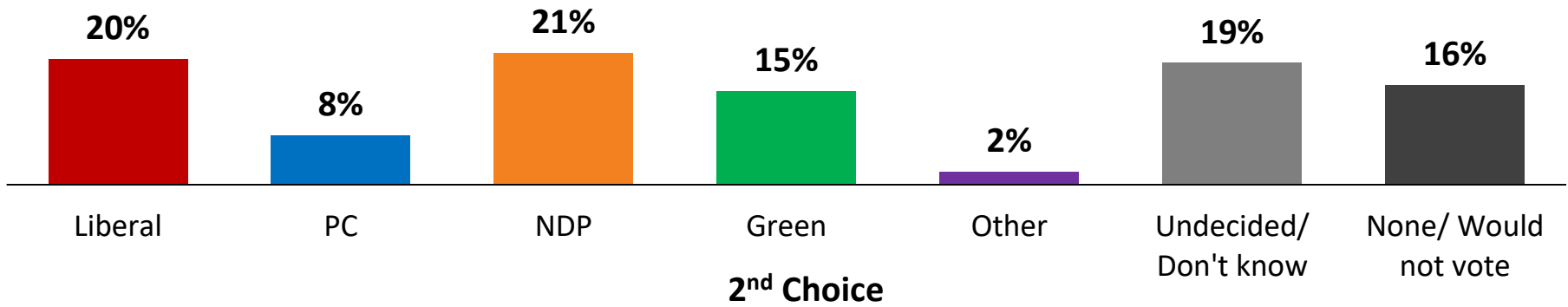
	Overall	Liberal	PC	NDP	Green/Other
Very likely	3%	4%	4%	1%	5%
Somewhat likely	29%	42%	26%	21%	32%
Not very likely	33%	30%	32%	36%	25%
Not likely at all	31%	21%	30%	38%	29%
Don't know	5%	2%	8%	4%	8%
Net Likely	-32%	-4%	-33%	-52%	-16%

Likelihood to vote 2nd choice

Likelihood by 2nd Choice: Liberals and Green/Other are least likely to benefit from vote switching¹⁴



And which party would be your second choice?
[asked of all respondents who have a vote choice; n=732]



Likelihood to vote 2nd choice

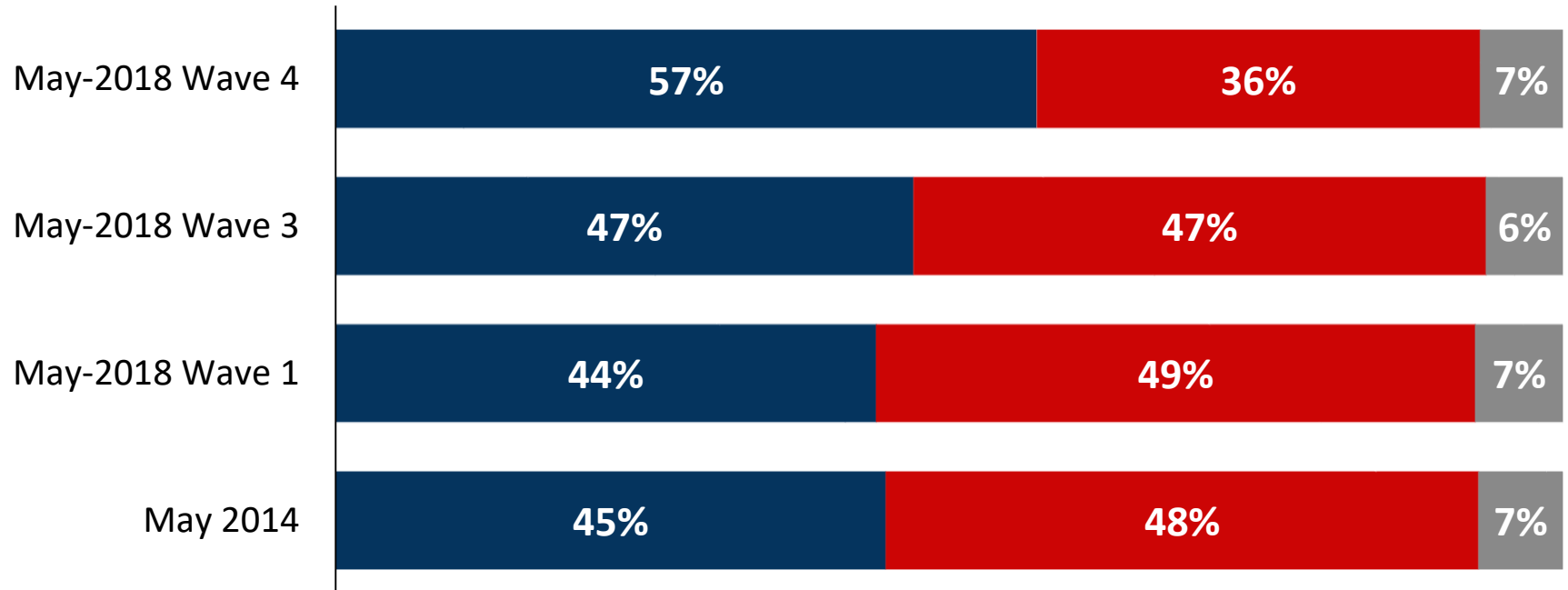
	Overall	Liberal	PC	NDP	Green/Other
Very likely	3%	0%	8%	3%	4%
Somewhat likely	29%	24%	47%	36%	16%
Not very likely	33%	35%	22%	35%	32%
Not likely at all	31%	36%	16%	21%	44%
Don't know	5%	5%	6%	5%	4%
Net Likely	-32%	-47%	17%	-17%	-56%

“Heard All I Need”: More than half say they have heard all they need to make up their mind in this election

Q

Which statement is closest to your view about the upcoming provincial election?

[asked of all respondents; n=800]

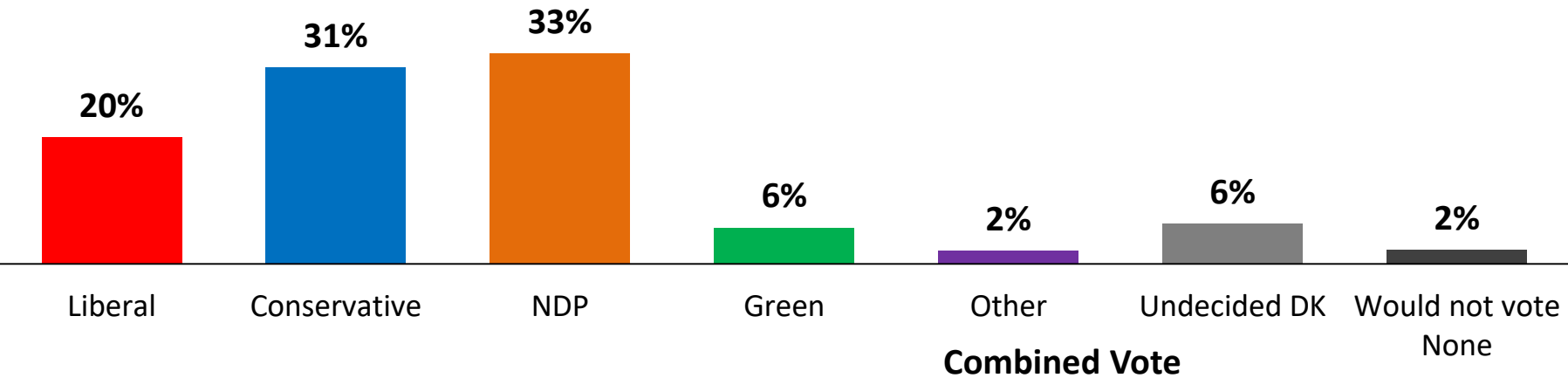


- I have heard all I need to make up my mind in this election
- I would like to hear more before I finally make up my mind in this election
- Don't know

Satisficing by Vote: PC voters are most likely to have made up their mind



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=800]

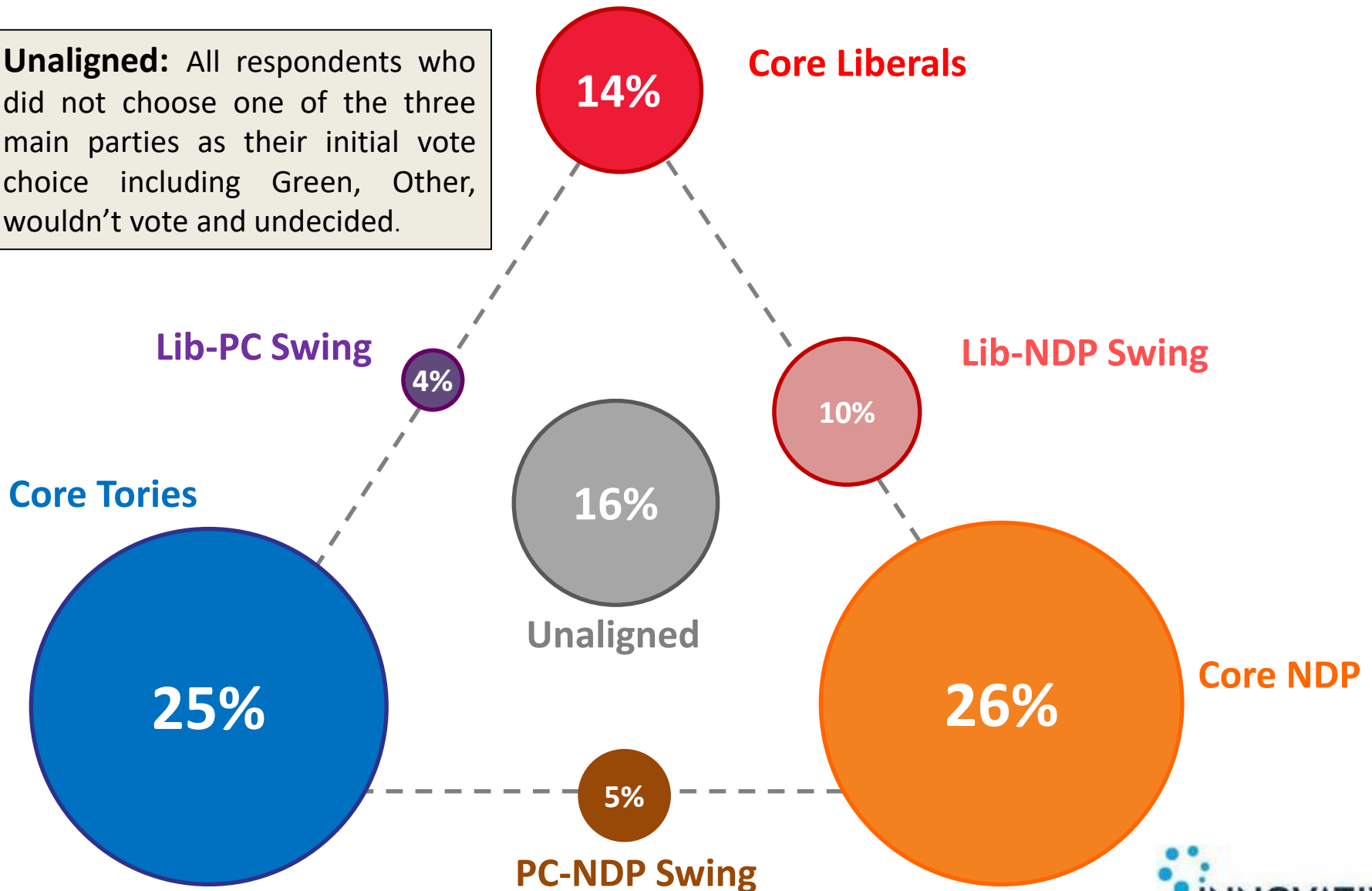


Heard all I need...

	Overall	Liberal	PC	NDP	Green/Other
I have heard all I need to make up my mind in this election	57%	57%	67%	59%	48%
I would like to hear more before I finally make up my mind in this election	36%	40%	30%	37%	25%
Don't know	7%	3%	2%	4%	26%

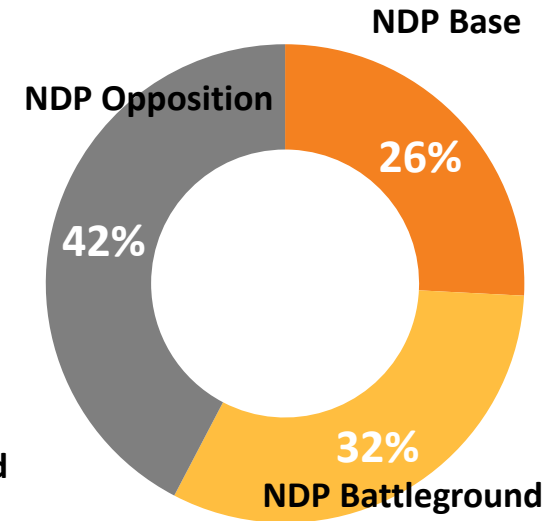
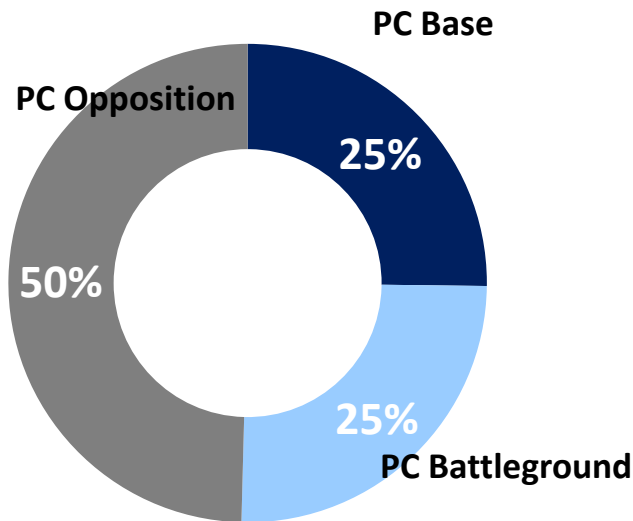
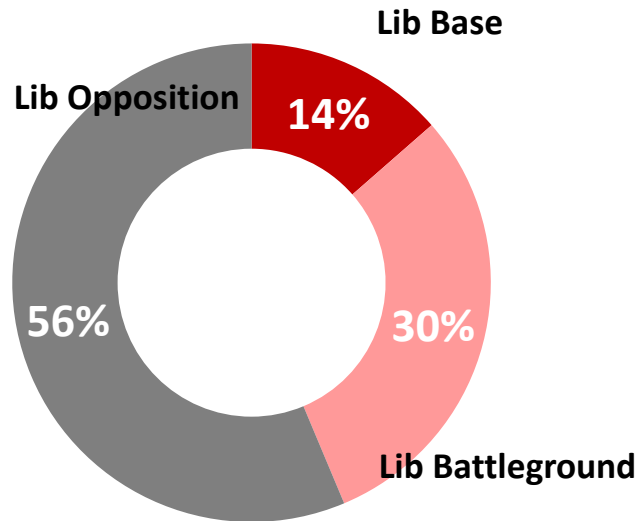
Battleground Segments (May 2018 Wave 4)

Unaligned: All respondents who did not choose one of the three main parties as their initial vote choice including Green, Other, wouldn't vote and undecided.



Party Voter Pools: NDP have the largest battleground and least opposition; NDP base the same size as PCs

[Based on respondents' vote choice, second choice, and whether or not they say they have heard all they need or would like to heard more before making up their minds]

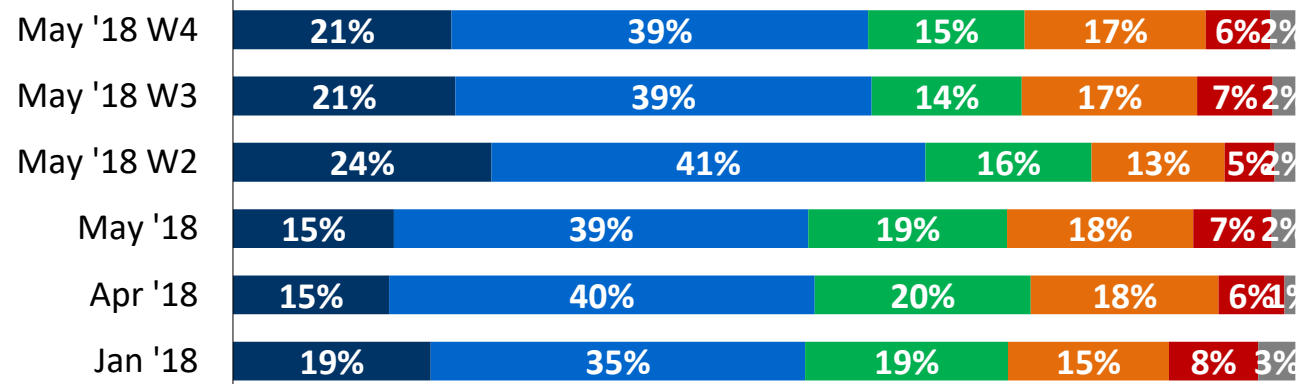


Alienation Segmentation

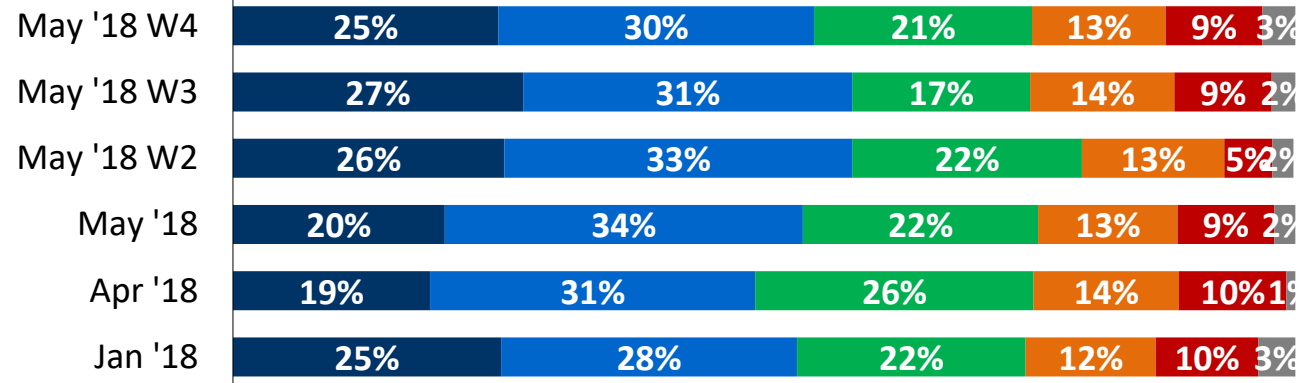
Economic Values Tracking: These two value statements define economic alienation segmentation we can track over time

Q Do you agree or disagree with the following statements?

Here in Ontario, you can be anything if you are willing to work for it.



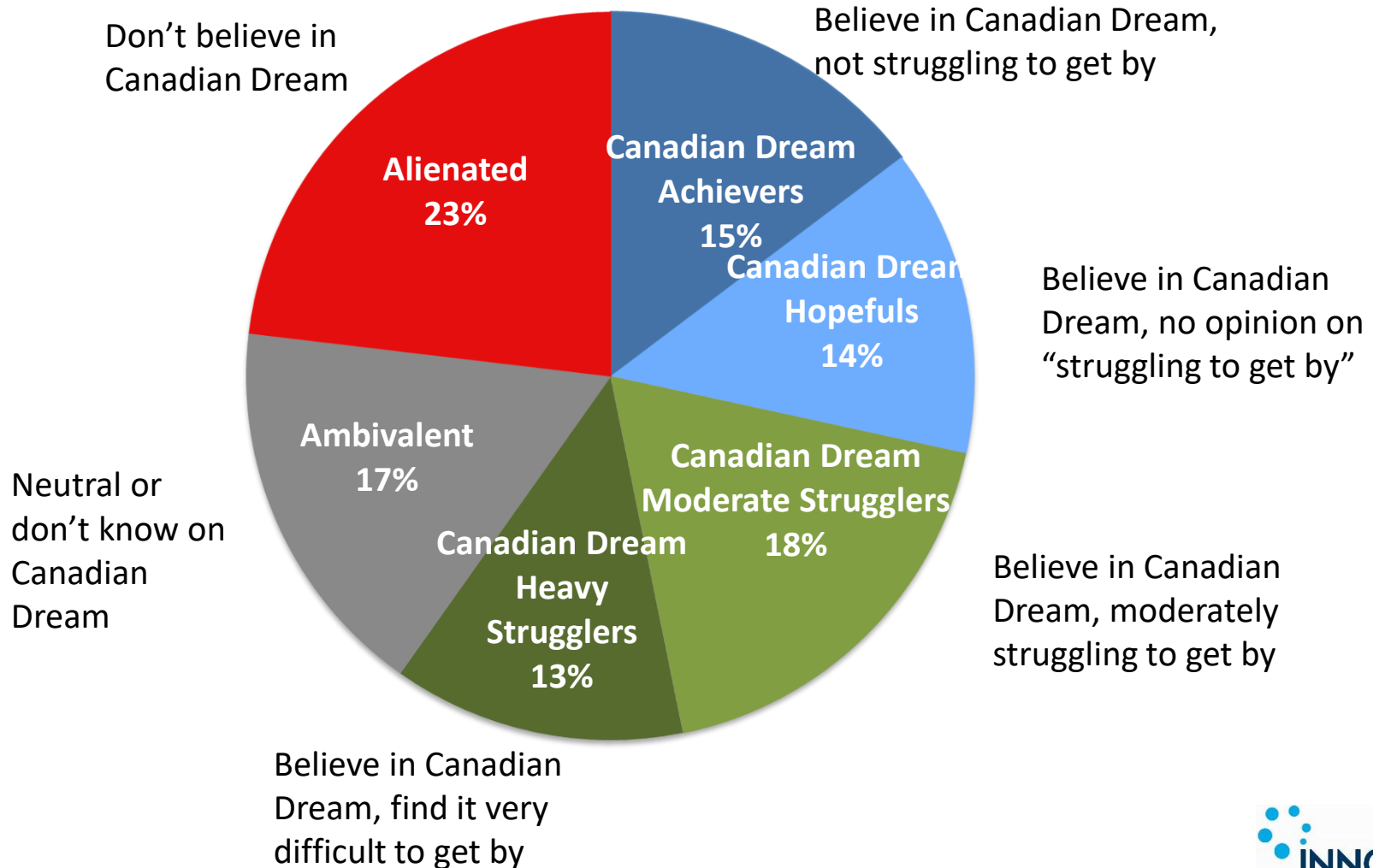
No matter how hard I work, every year it seems more difficult to get by



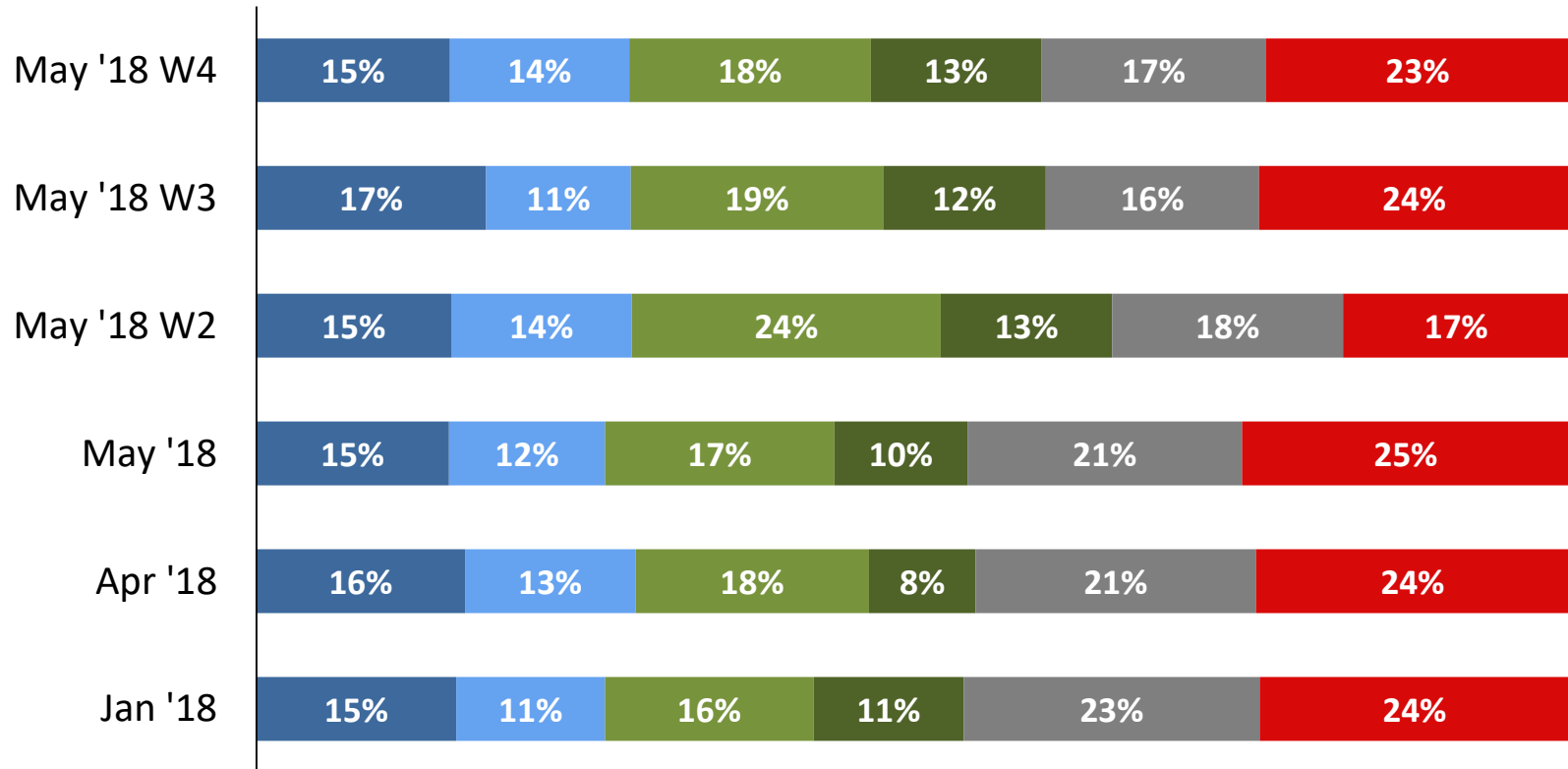
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

Economic Alienation Segmentation: 4-in-10 (40%) are either ambivalent or alienated

Based on the two economic alienation questions – Agree/Disagree “Here in Ontario, you can be anything if you are willing to work for it” and “No matter how hard I work, every year it seems more difficult to get by” – we group respondents who share common sets of values to better understand the motivations and needs of voters.



Economic Alienation Segmentation: Marginal shift between²² Dream Achievers and Hopefuls



■ Canadian Dream Achievers

■ Canadian Dream Hopefuls

■ Canadian Dream Moderate Strugglers

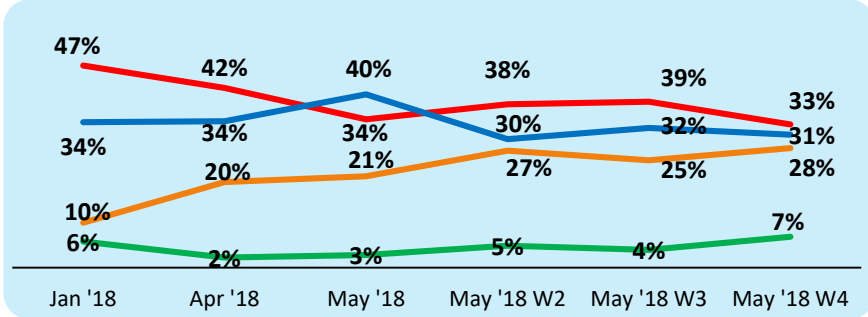
■ Canadian Dream Heavy Strugglers

■ Ambivalent

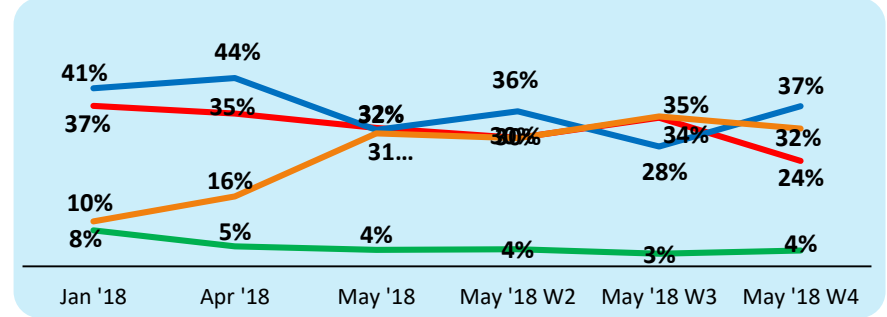
■ Alienated

Tracking Decided Vote by Alienation Segmentation

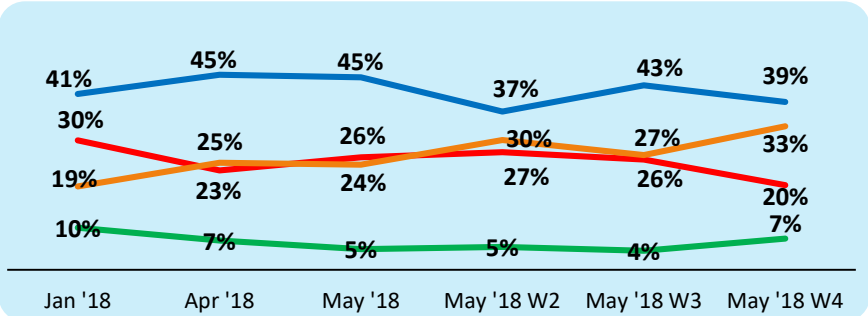
Canadian Dream Achievers



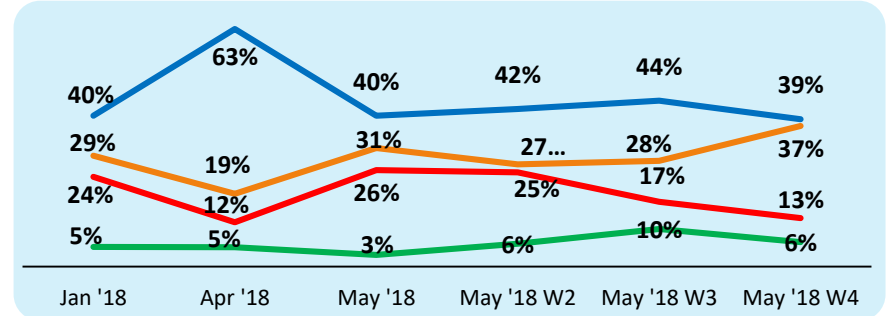
Canadian Dream Hopefuls



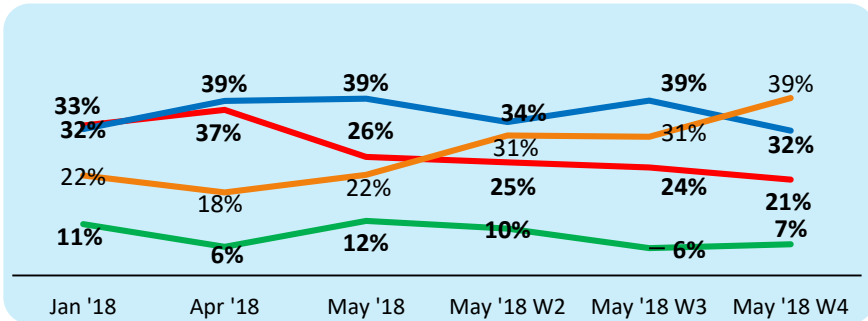
Canadian Dream Moderate Strugglers



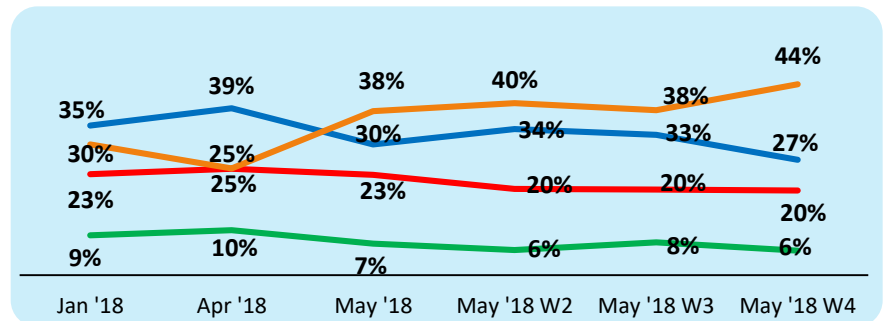
Canadian Dream Heavy Strugglers



Ambivalent



Alienated

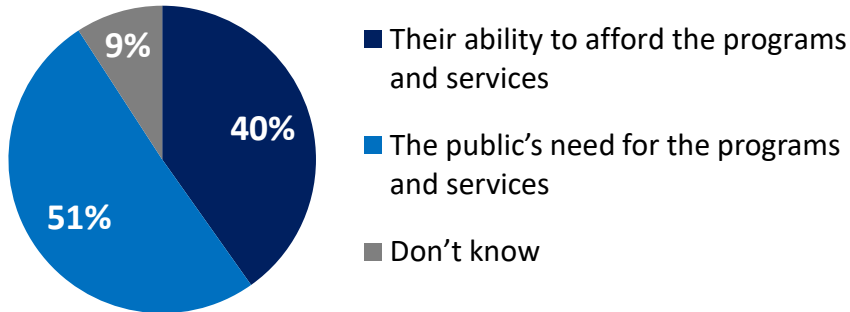


Decided vote: **Liberal** **PC** **NDP** **Green**

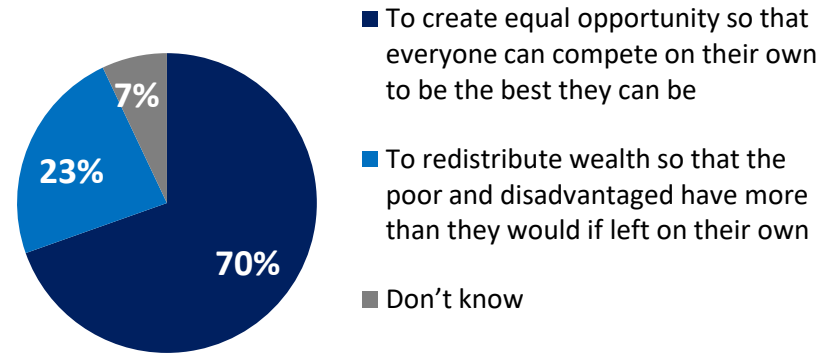
Value Clusters

Core Political Values: These four value statements define value cluster analysis that we can compare directly to 2014

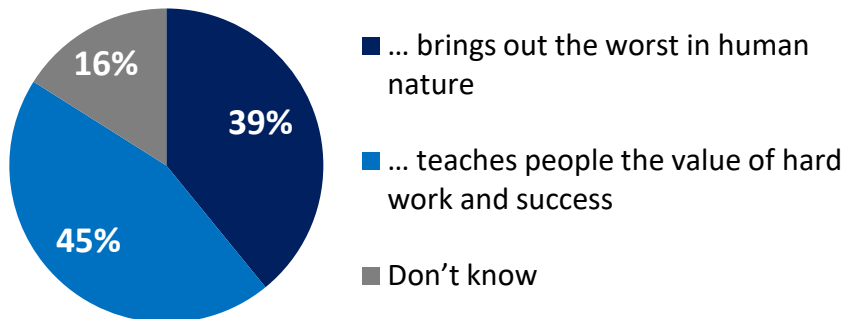
Q When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



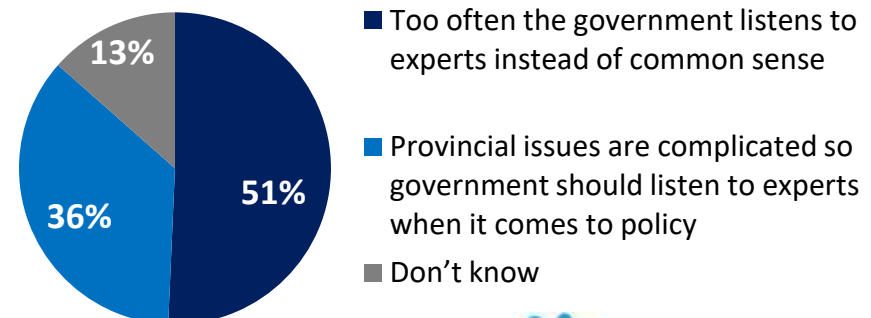
Q Is the main role of government ...?



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



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

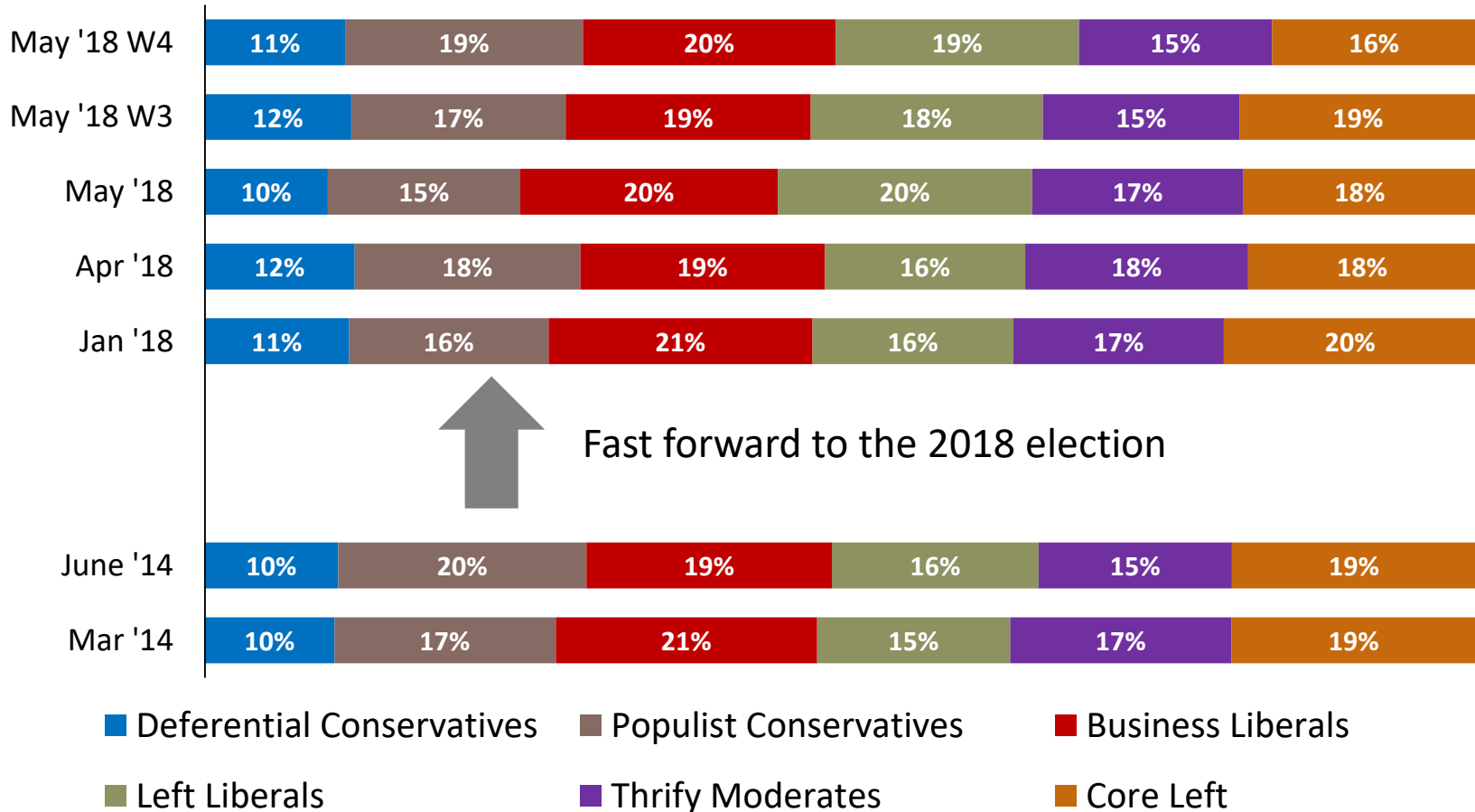


Defining Value Clusters

		Deferential Conser- vatives	Populist Conser- vatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Is the main role of government to ...?	Create equal opportunity	91%	100%	76%	96%	48%	0%
	Redistribute wealth	7%	0%	15%	0%	27%	97%
The profit system ...	Brings out worst in human nature	0%	0%	0%	80%	67%	85%
	Teaches value of hard work and success	88%	91%	87%	0%	5%	0%
When gov'ts make decisions on spending on programs, do you think they should base their decisions on...	Ability to afford	93%	96%	0%	0%	80%	0%
	Public need	0%	0%	95%	87%	0%	94%
When it comes to government decision making...	Listen to experts	0%	100%	44%	57%	49%	31%
	Rely on common sense	91%	0%	45%	21%	21%	60%

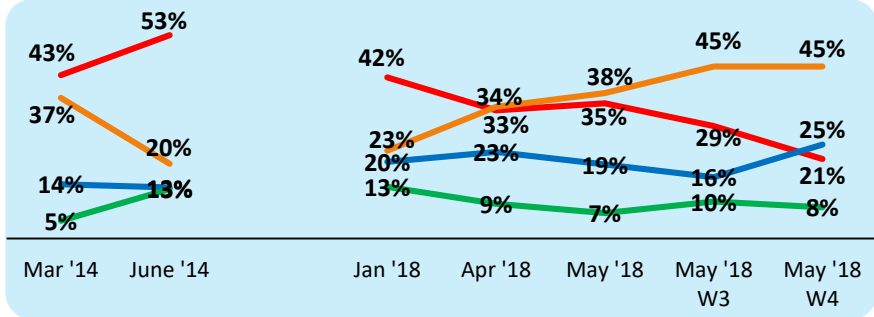
Value Clusters: Tracking clusters over time

These clusters tracking back to the 2014 election are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

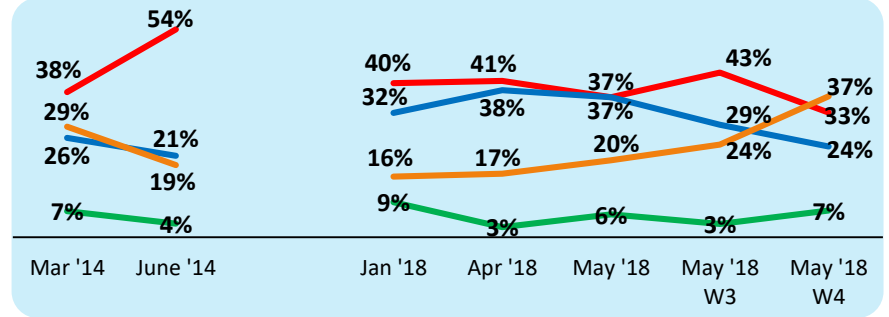


Tracking Decided Vote by Value Cluster

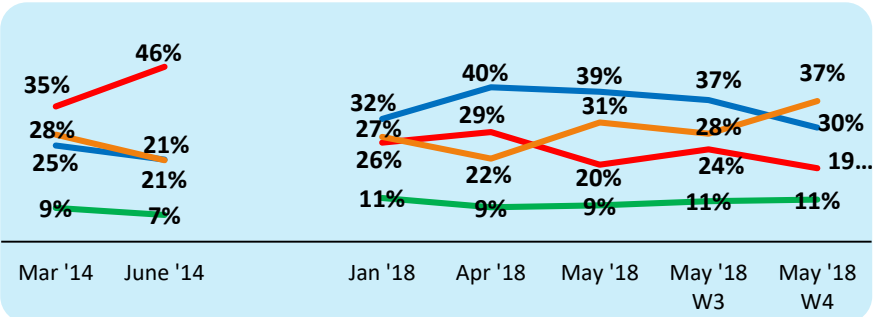
Left Liberals



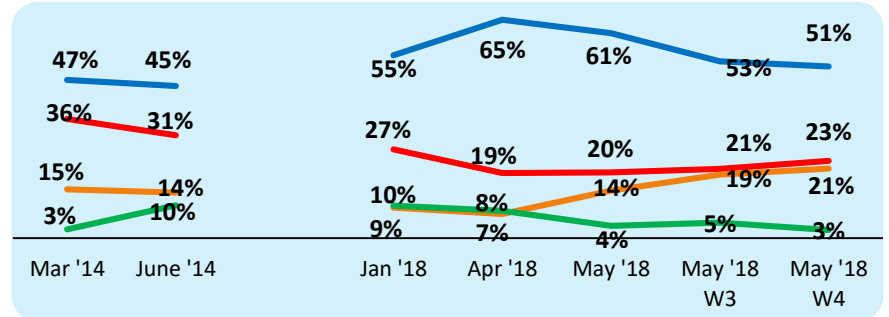
Business Liberals



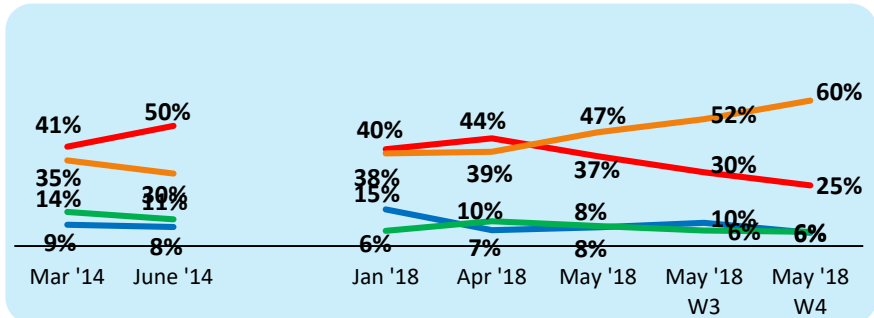
Thrifty Moderates



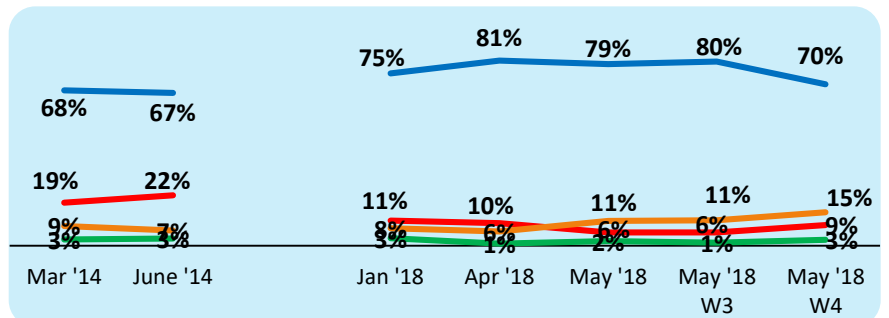
Deferential Conservatives



Core Left



Populist Conservatives



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



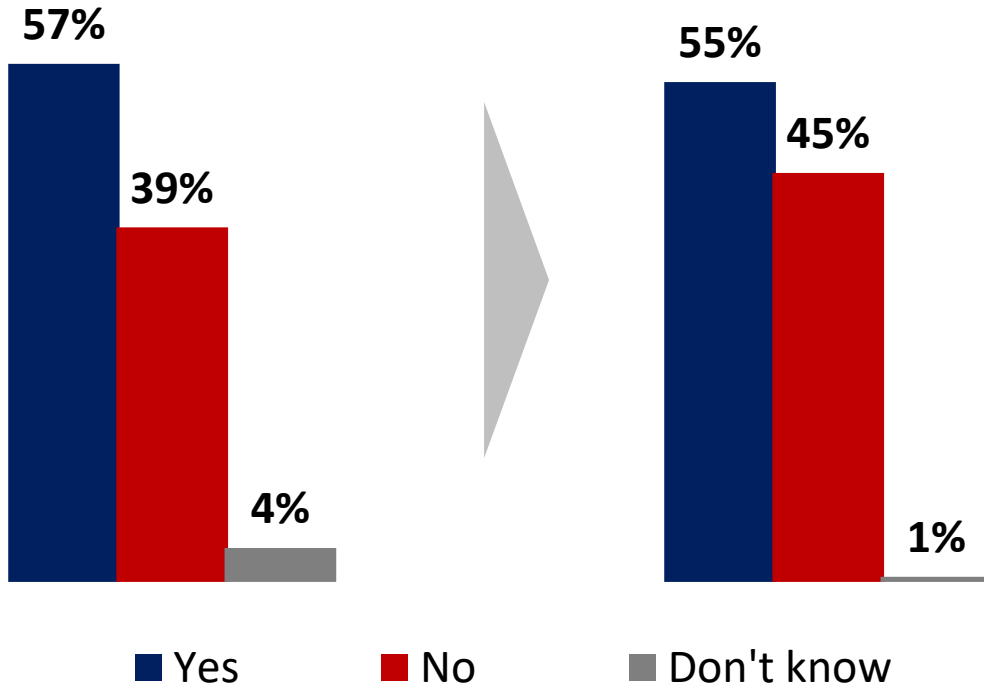
May 27th Leadership Debate

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



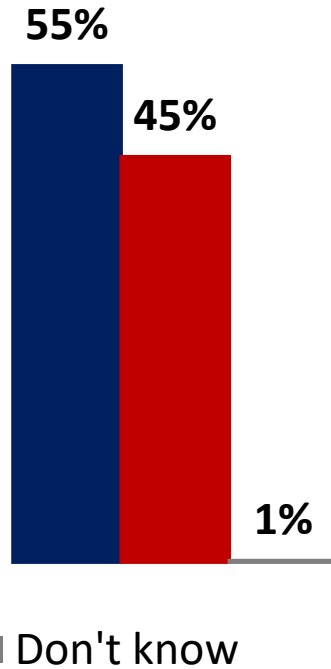
Have you read, seen or heard anything about the Ontario leader's TV debate that was held on Sunday, May 27th?

[asked of all respondents, n=800]



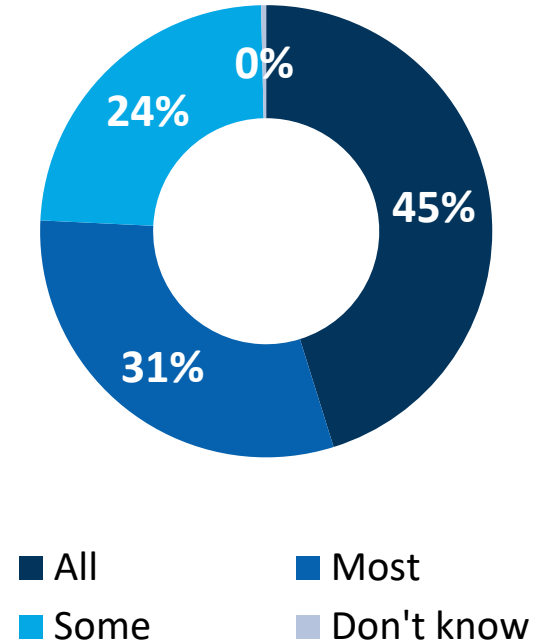
Did you happen to watch the leader's debate yourself?

[asked of those who RSH; n=459]



Did you watch all of the debate or just some of it?

[asked of those who watched; n=252]

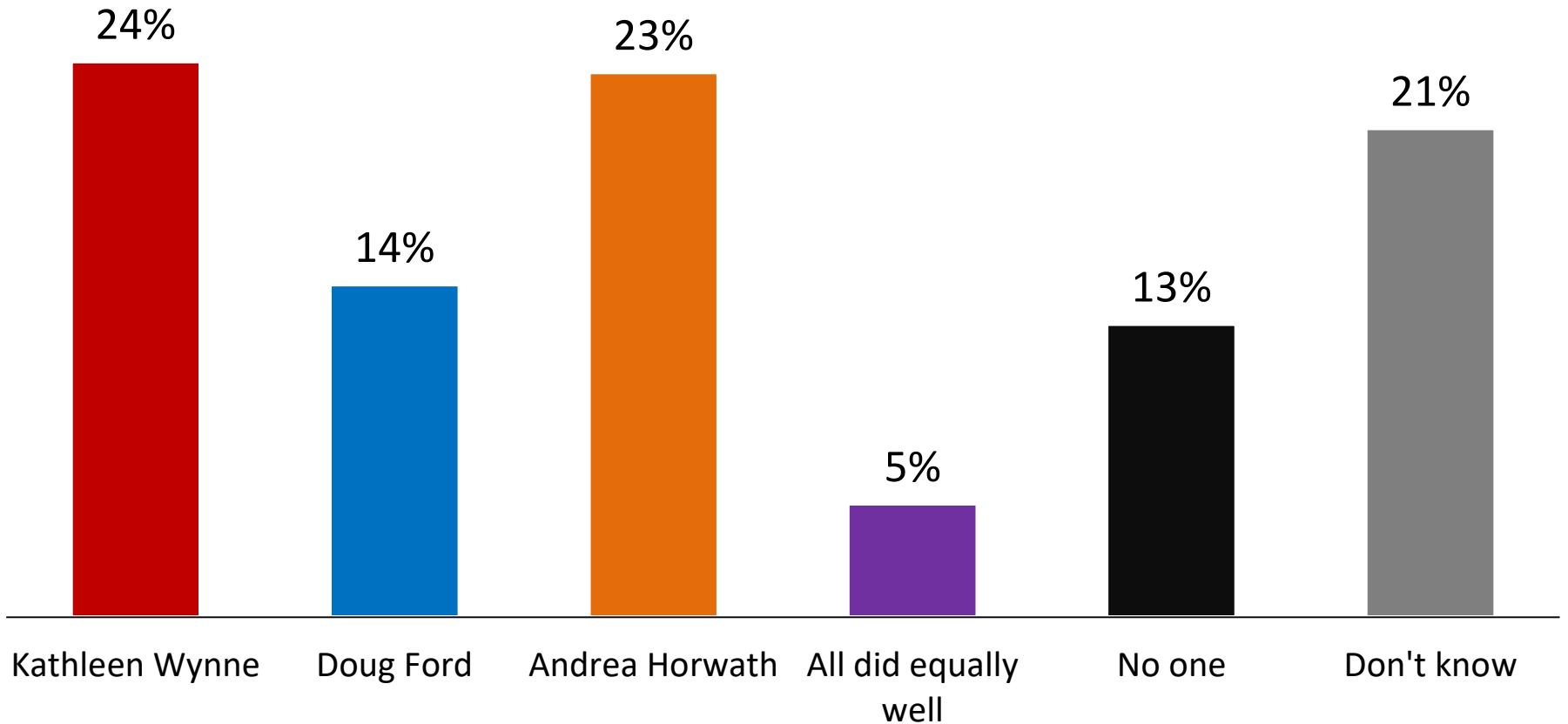


Who Won the Debate? Wynne and Horwath bested Ford, but one-in-five (21%) not sure who won



In your opinion, which leader did the best in that debate?

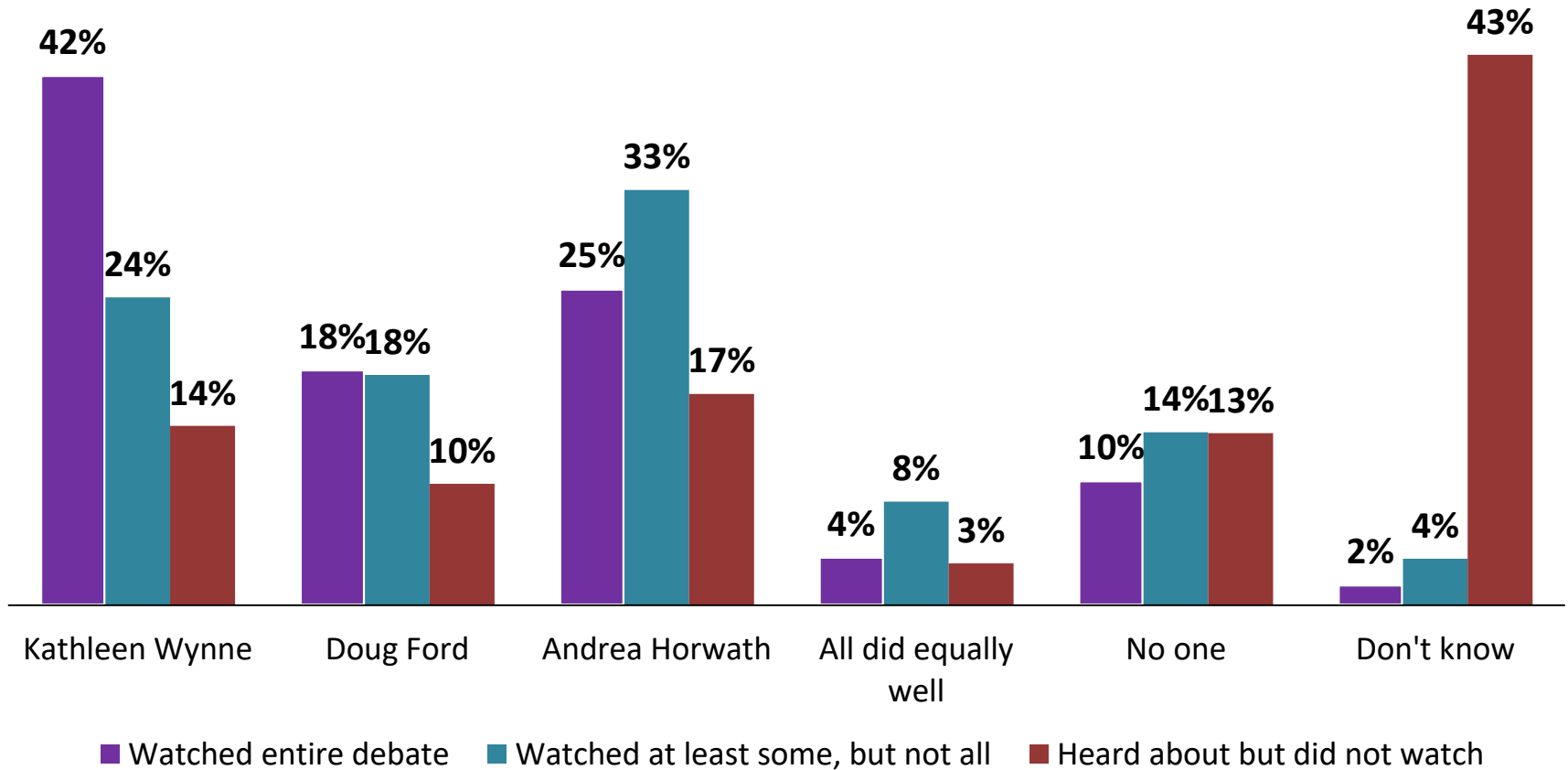
[asked of those who RSH; n=459]



Winner by Attention: Those who watched the entire debate³² favoured Wynne's performance over the other leaders



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

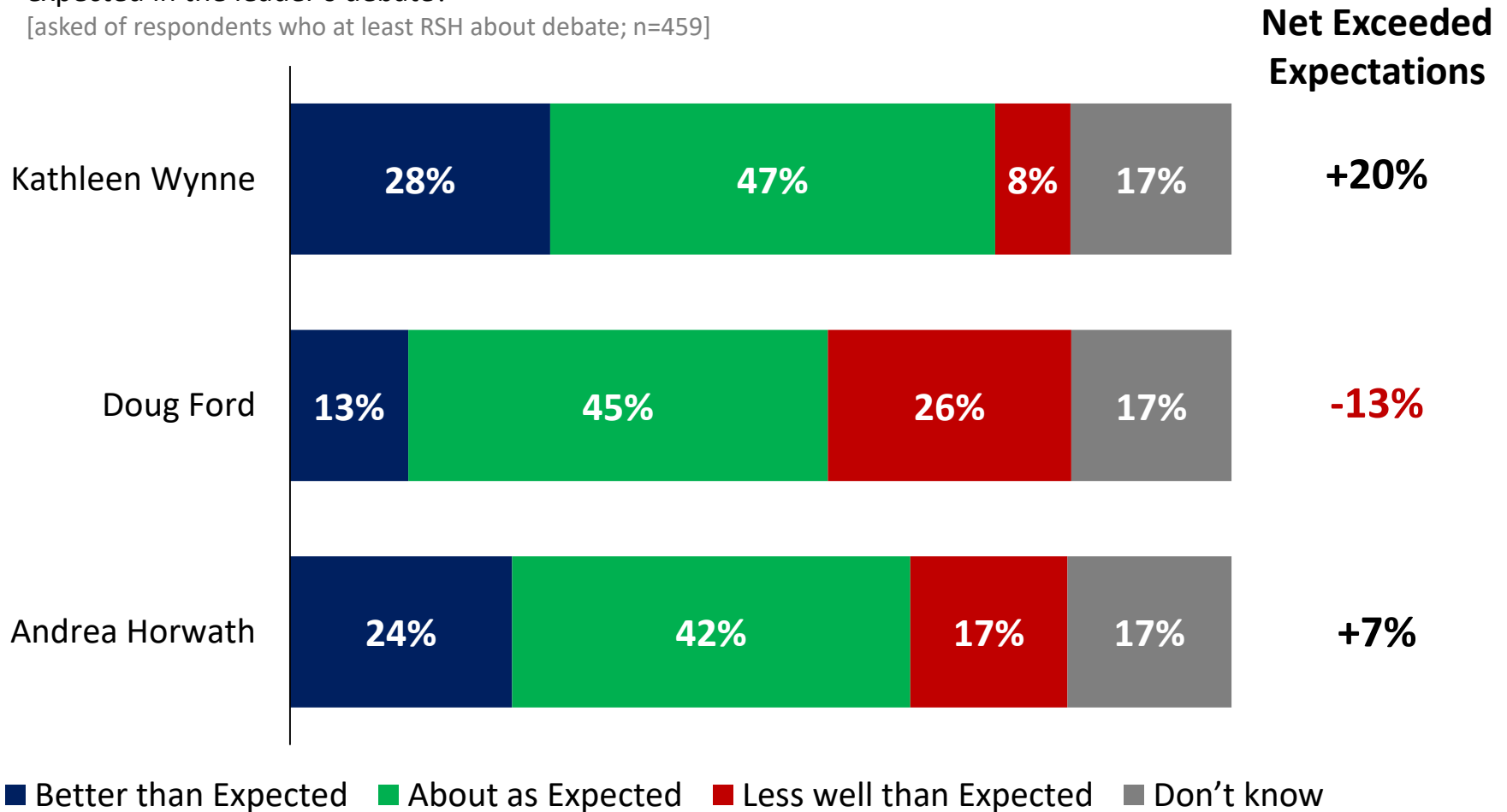


Debate Performance: Wynne did better than expected, while Ford underperformed



For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leader's debate?

[asked of respondents who at least RSH about debate; n=459]



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

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

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

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

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

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

Debate Performance by Alienation: Wynne exceeded expectations across all segments

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

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



Building Understanding.

Personalized research to connect you and your audiences.

For more information, please contact:

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