

Innovative Research Group, Inc.

[www.innovativeresearch.ca](http://www.innovativeresearch.ca)

Toronto :: Vancouver



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# 2015 Election Polling: Horseshoe

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## Note to Reader

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- This report summarises the results of two simultaneous polls, one online and one telephone.
- Please be sure to read both the telephone and the online methodology to see the details on how each was conducted.
- The first results section focuses on comparing the horserace results of the two surveys
- The subsequent results sections focuses on comparing the online results with previous waves of online polling.

**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.*

# Telephone Methodology

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- This survey was conducted by live callers on telephone among 1,784 randomly-selected Canadian residents, 18 years or older, between September 15<sup>th</sup> and September 23<sup>rd</sup>, 2015.
- Both cell phone and landline sample are included to ensure that the final sample is representative of the Canadian population.
- Only one respondent per household was eligible to complete this survey.
- The sample has been weighted by age, gender and region using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population.
- After weighting the sample to 1,500, the aggregated results are considered accurate to within  $\pm 2.5\%$ , 19 times out of 20. The margin of error will be larger within each sub-grouping of the sample.

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# Telephone Regions: Where did respondents come from?

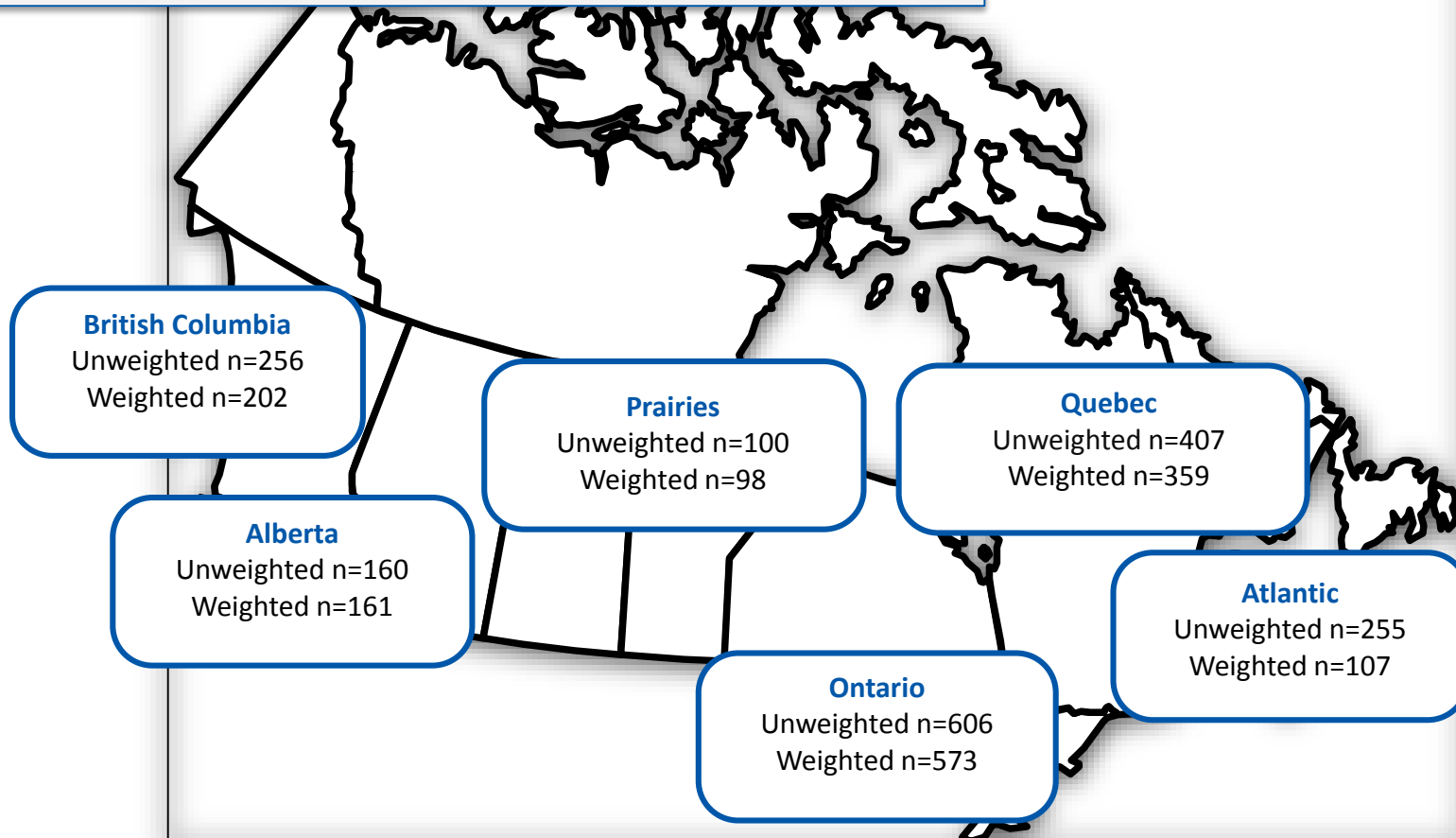
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

## National

Unweighted n=1,784

Weighted n=1,500



# Telephone Weights: Region, Age, Gender

Region	BC	Alberta	Prairies	Ontario	Quebec	Atlantic Canada
Unweighted (n-size)	256	160	100	606	407	255
Weighted (n-size)	202	161	98	573	359	107

Age	18-34	35-44	55+
Unweighted (n-size)	364	702	712
Weighted (n-size)	418	554	522

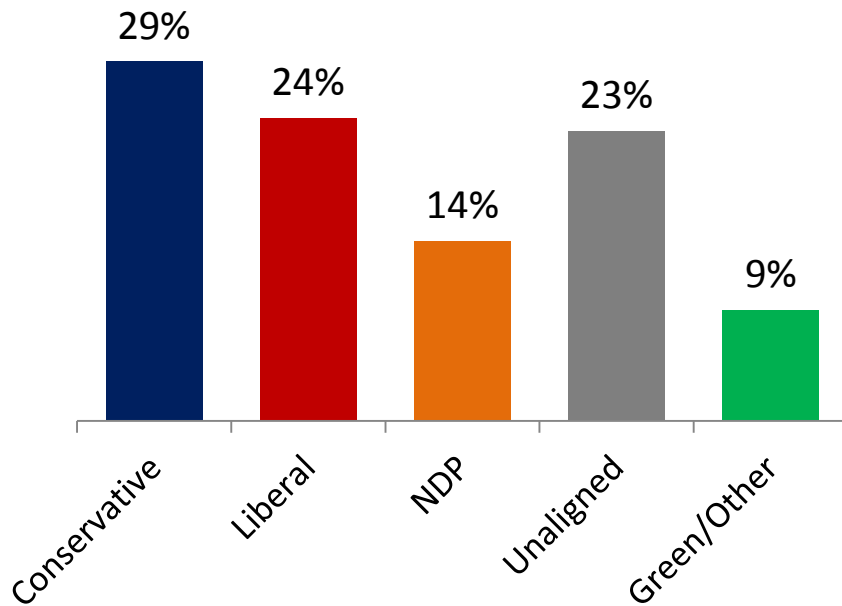
Gender	Men	Women
Unweighted (n-size)	888	896
Weighted (n-size)	727	773

# Telephone Party ID: CPC now leads LPC in Rest of Canada; 4-in-10 unaligned in Quebec

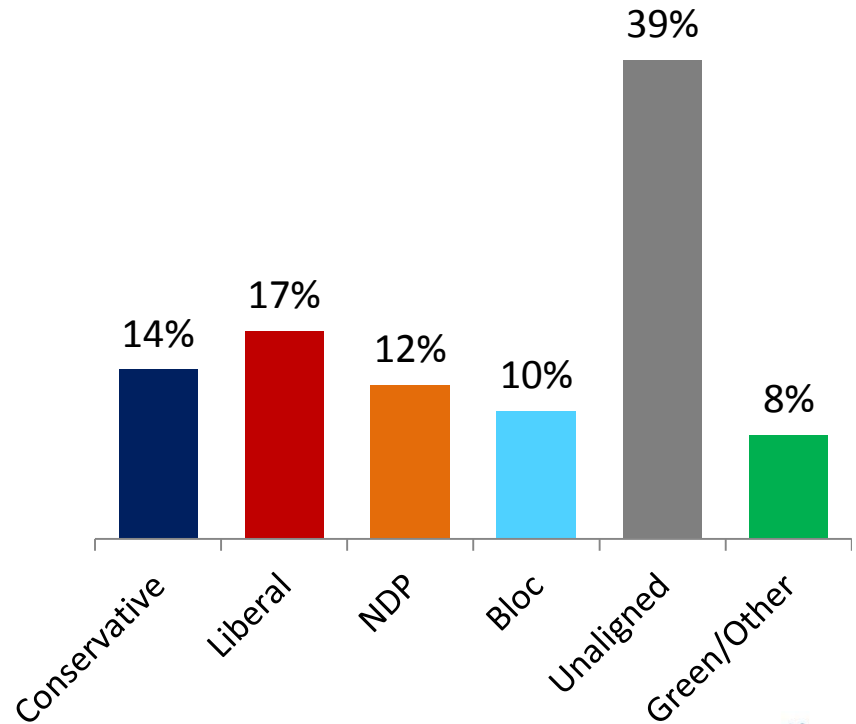


Thinking about federal politics, generally speaking do you think of yourself as a...

## Rest of Canada



## Quebec



n=478

# Online Methodology

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- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from September 20<sup>th</sup> to September 24<sup>th</sup>, 2015. In the following slides we will refer to data from this poll as “Wave 4 (September)”.
- This online survey of 2,805 Canadians was conducted using both INNOVATIVE’s Canada 20/20 national panel (n=1,534) and additional sample provided by Survey Sampling International (n=1,271).
- Tracking is drawn from two previous waves of online polling: “Wave 1 (July)” from July 24<sup>th</sup>-30<sup>th</sup>, 2015, n=2833; and “Wave 2 (August)” from August 24<sup>th</sup> to August 31<sup>st</sup>, 2015, n=3,631; and “Wave 3 (September)” from September 4<sup>th</sup>-10<sup>th</sup>, 2015, n=2,121.
- The Canada 20/20 Panel is recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole.
- The sample is then weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data. To control for a possible attitudinal bias in online sample, when we can we weight online data using party identification from a random telephone poll. Waves, 1, 2, and 4 were weighted in this way. No recent telephone data was available for Wave 3.
- Because the sample included oversamples in some smaller provinces, the final weighted sample size is N=2,000.
- 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.
- Since online surveys are not random probability based samples, 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:** *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

# Online Regions: Where did respondents come from?

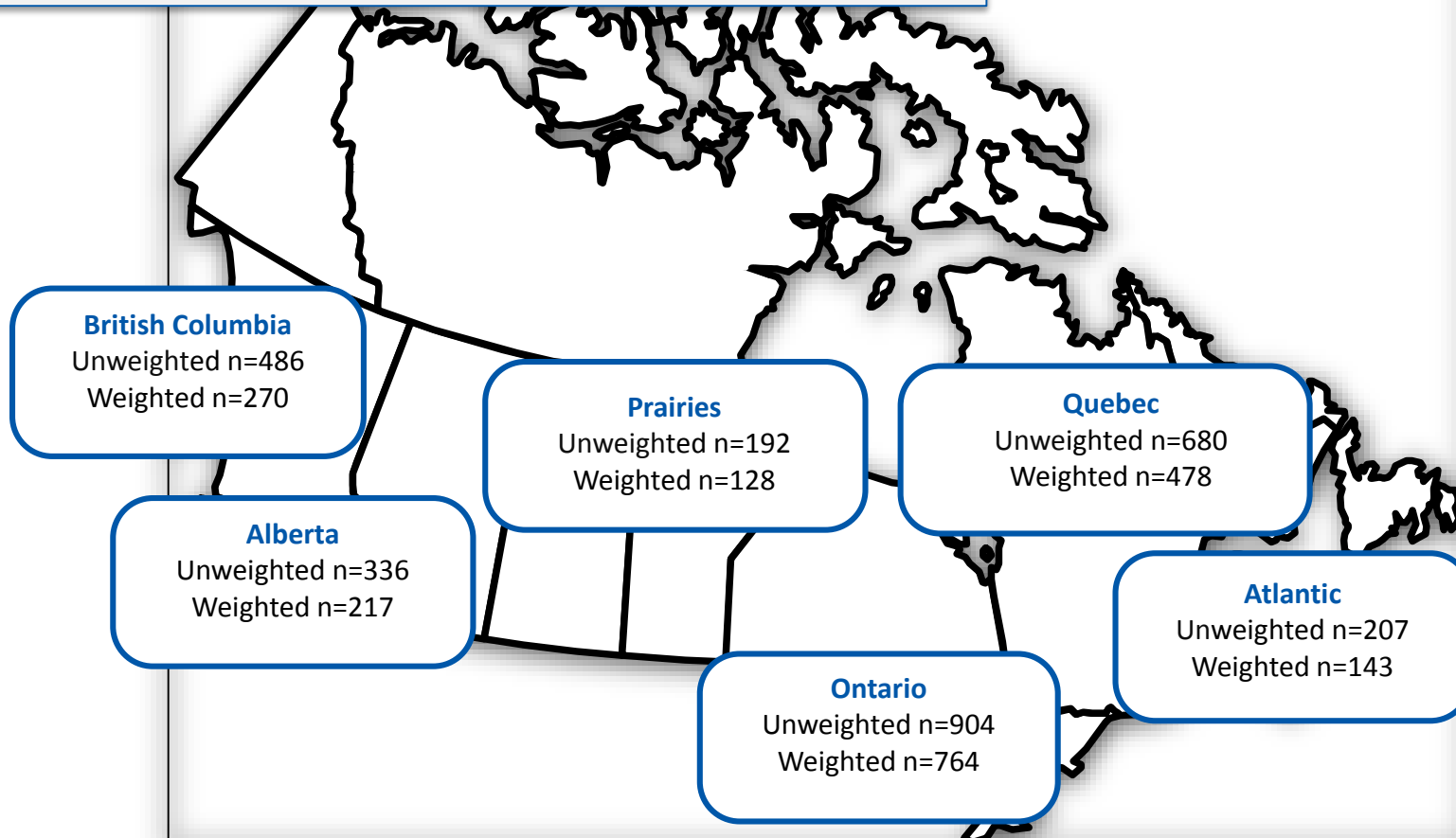
Regional groupings include:

- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

## National

Unweighted n=2,805

Weighted n=2,000





# Online Weights: Region, Age, Gender

Region	BC	Alberta	Prairies	Ontario	Quebec	Atlantic Canada
Unweighted (n-size)	486	336	192	904	680	207
Weighted (n-size)	270	217	128	764	478	143

Age	18-34	35-44	55+
Unweighted (n-size)	621	728	1456
Weighted (n-size)	571	740	688

Gender	Men	Women
Unweighted (n-size)	1409	1396
Weighted (n-size)	963	1037

# Online Weighting by party ID

In several recent provincial elections, some or all of the final online polls failed to predict the outcome. In some cases they predicted the wrong winner. While we can weight to make the online reflect the broader population on a few demographics, there is a question of whether online samples may be different in terms of political attitudes.

To control for a possible attitudinal bias in online sample, when we can we weight online data using party identification from a random telephone poll. We timed our most recent national telephone poll of randomly-selected cell and land line numbers to finish at the same time as our current online poll. We have used those numbers to weight the online data. The tables below show the impact on vote by region. It makes a small difference to the national results but a bigger difference in Alberta, the Prairies and Ontario. We believe the results using the Party Identification weight but you can use your own judgement in deciding which to believe.

Region	BC		Alberta		Prairies		Ontario		Quebec		Atlantic Canada	
	PID	REG	PID	REG	PID	REG	PID	REG	PID	REG	PID	REG
Conservative	29.5%	30.4%	40.1%	37.2%	31.0%	27.5%	29.8%	28.1%	14.7%	17.1%	18.4%	21.8%
Liberal	19.6%	19.6%	18.4%	20.9%	24.8%	28.2%	32.3%	34.4%	13.4%	14.2%	39.7%	36.6%
NDP	31.0%	31.1%	24.4%	25.6%	18.6%	19.8%	20.9%	21.8%	30.2%	30.4%	21.3%	19.7%
Bloc Quebecois									12.8%	19.0%		
Green/Other	12.5%	11.1%	5.1%	5.1%	10.9%	10.7%	7.3%	7.1%	6.5%	4.0%	6.4%	8.5%
Undecided/WNV	7.4%	7.8%	12.0%	11.2%	14.7%	13.7%	9.7%	8.6%	22.4%	15.4%	14.2%	13.4%

PID = Weighted according to telephone party ID distribution in addition to standard demographic weights

REG = Standard demographic weights only

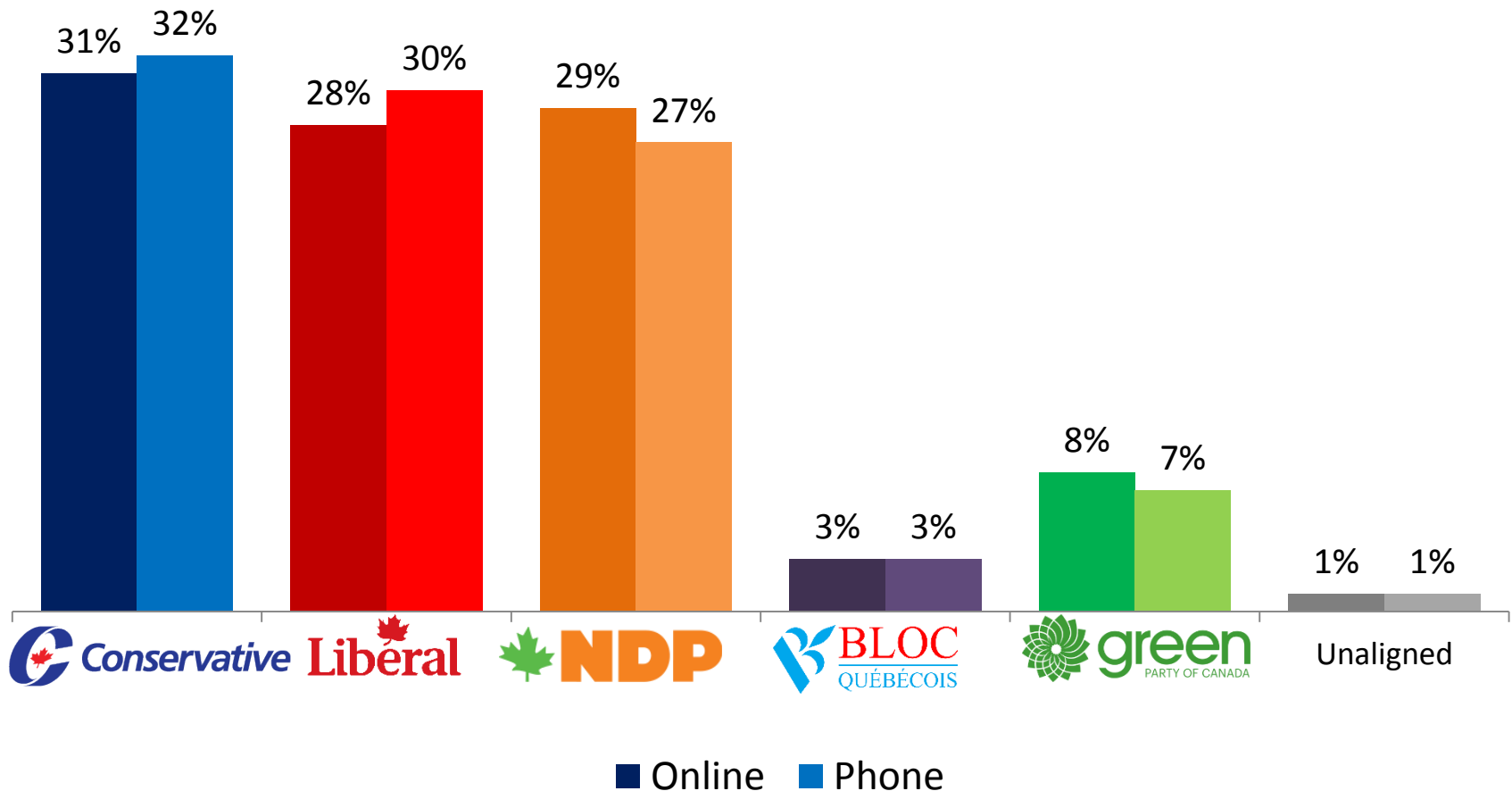
# Comparing Online and Telephone Vote Results

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# Decided Federal Vote Comparison: Online vs Telephone

Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED VOTE]



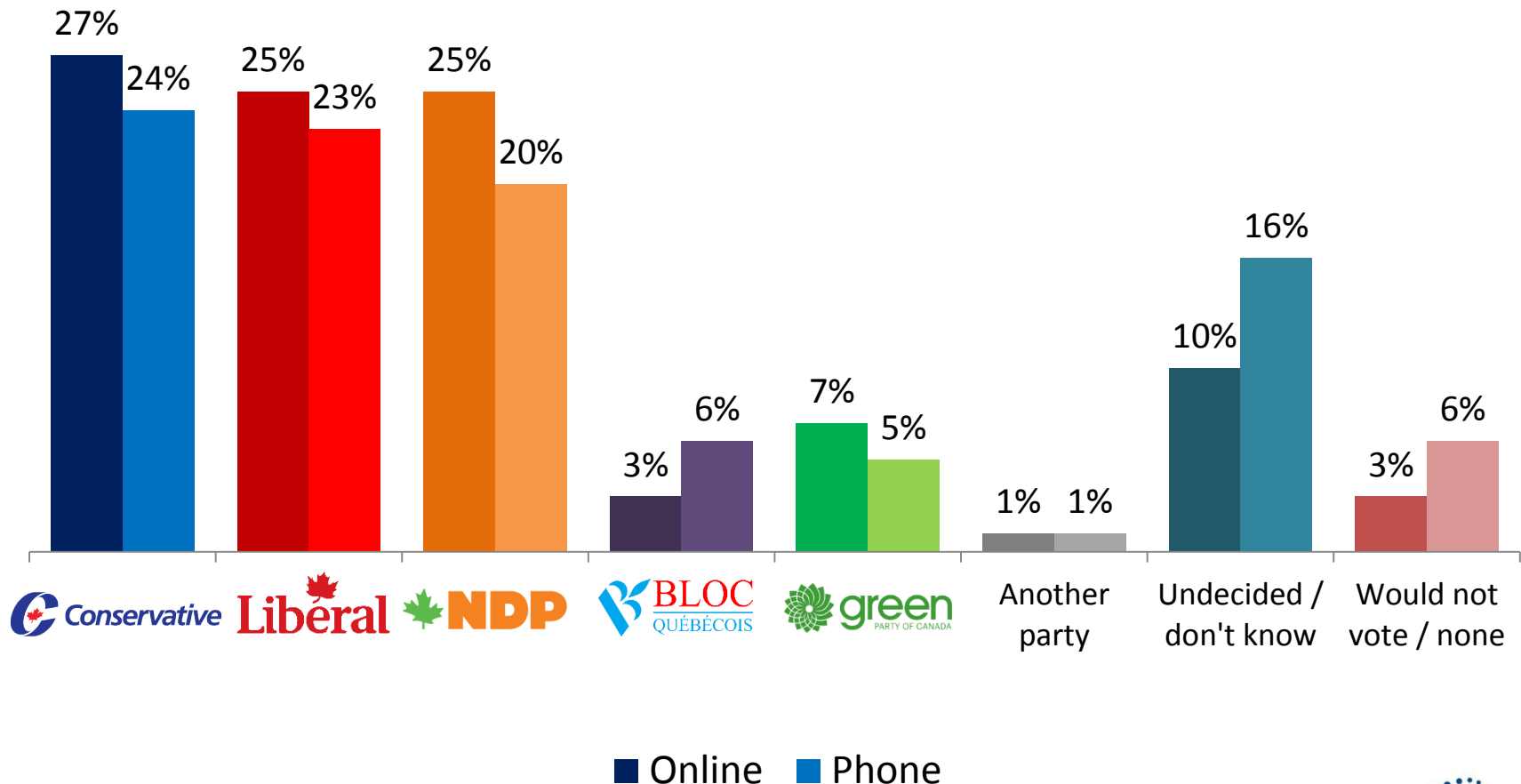
## Combined Vote by Region (column percentages)

	BC		Alberta		Prairies		Ontario		Quebec		Atlantic Canada	
	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE
 <b>Conservative</b>	<b>32%</b>	28%	<b>46%</b>	<b>48%</b>	<b>36%</b>	<b>40%</b>	33%	35%	19%	20%	21%	22%
 <b>Liberal</b>	21%	26%	21%	25%	29%	25%	<b>36%</b>	<b>37%</b>	17%	21%	<b>46%</b>	<b>46%</b>
 <b>NDP</b>	<b>33%</b>	<b>31%</b>	28%	25%	22%	24%	23%	22%	<b>39%</b>	<b>38%</b>	25%	23%
 <b>BLOC</b> QUÉBÉCOIS									16%	15%		
 <b>green</b> PARTY OF CANADA	13%	15%	5%	3%	12%	9%	6%	5%	7%	5%	7%	9%
<b>Other</b>	1%	1%	1%		1%	1%	2%	1%	1%	0%		1%






# Combined Federal Vote Comparison: Online vs Telephone

Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]



## Combined Vote by Region (column percentages)

	BC		Alberta		Prairies		Ontario		Quebec		Atlantic Canada	
	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE	ONLINE	PHONE
 Conservative	30%	22%	<b>40%</b>	<b>39%</b>	<b>31%</b>	<b>31%</b>	30%	<b>27%</b>	15%	13%	18%	16%
 Liberal	20%	20%	18%	20%	25%	19%	<b>32%</b>	<b>28%</b>	13%	13%	<b>40%</b>	<b>33%</b>
 NDP	<b>31%</b>	<b>24%</b>	24%	20%	19%	18%	21%	17%	<b>30%</b>	<b>23%</b>	21%	17%
 BLOC QUÉBÉCOIS									13%	9%		
 green PARTY OF CANADA	12%	12%	4%	2%	10%	7%	6%	4%	6%	3%	6%	6%
Other	1%	0%	1%		1%	1%	2%	1%	1%	0%		1%
Undecided/ Don't know	6%	14%	8%	14%	9%	16%	7%	14%	17%	<b>22%</b>	11%	15%
Would not Vote/ None	2%	4%	4%	1%	5%	4%	3%	4%	5%	11%	4%	6%

# Likelihood to Vote and Open to Change – Online Results Only

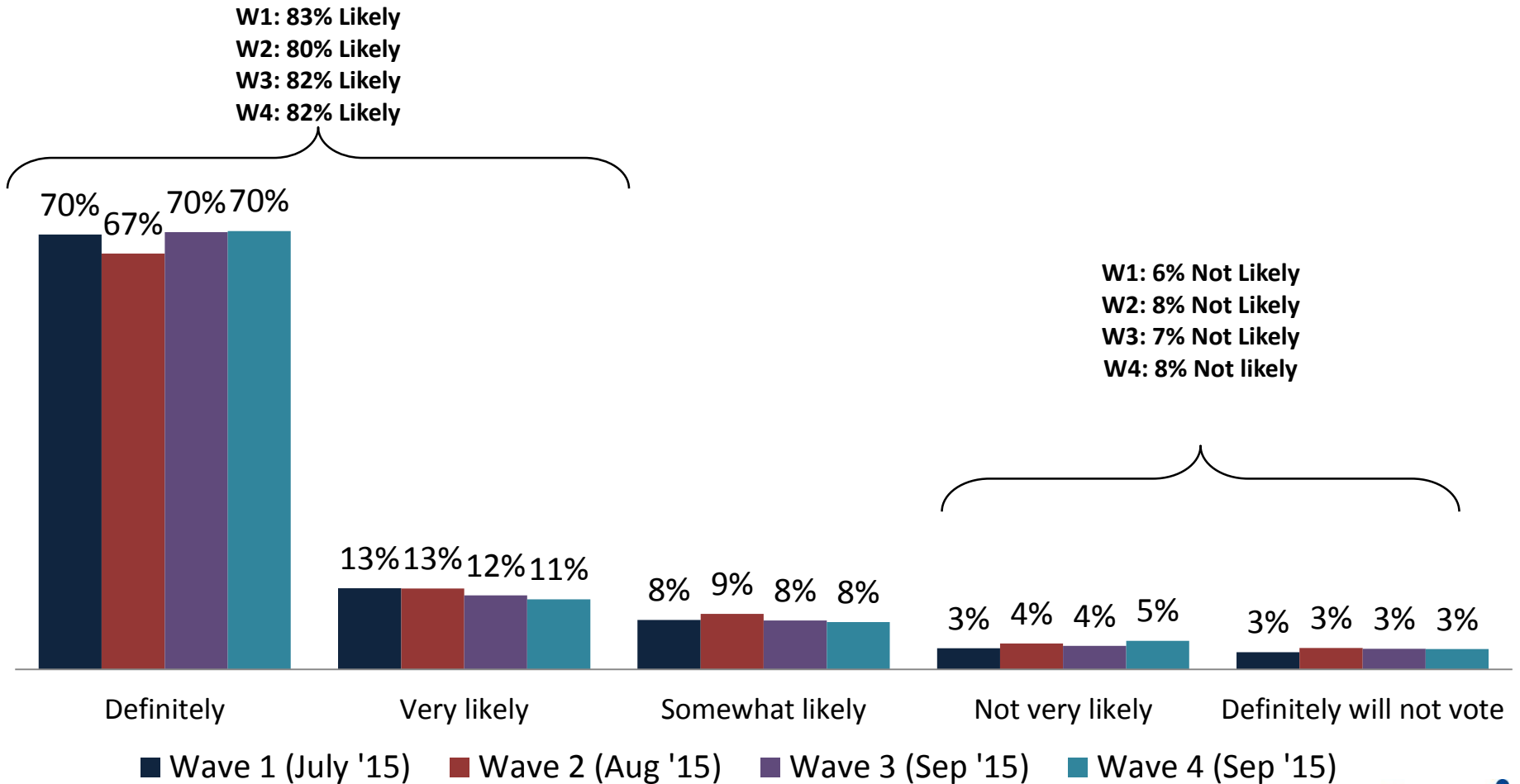
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# Likelihood to vote: over 8-in-10 say they are likely to vote in<sup>17</sup> election, steady in September



As you may have heard there is going to be a federal election on October 19th of this year. How likely are you to vote in the upcoming Canadian federal election?

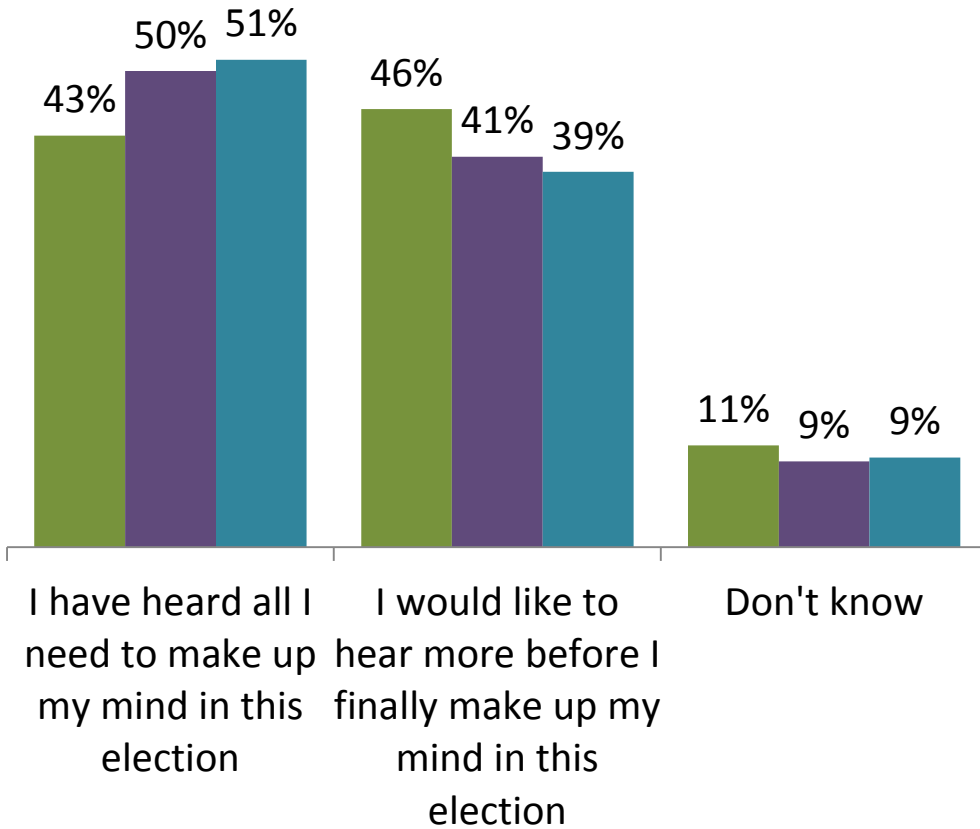


Note: 'Don't know' (3%) not shown

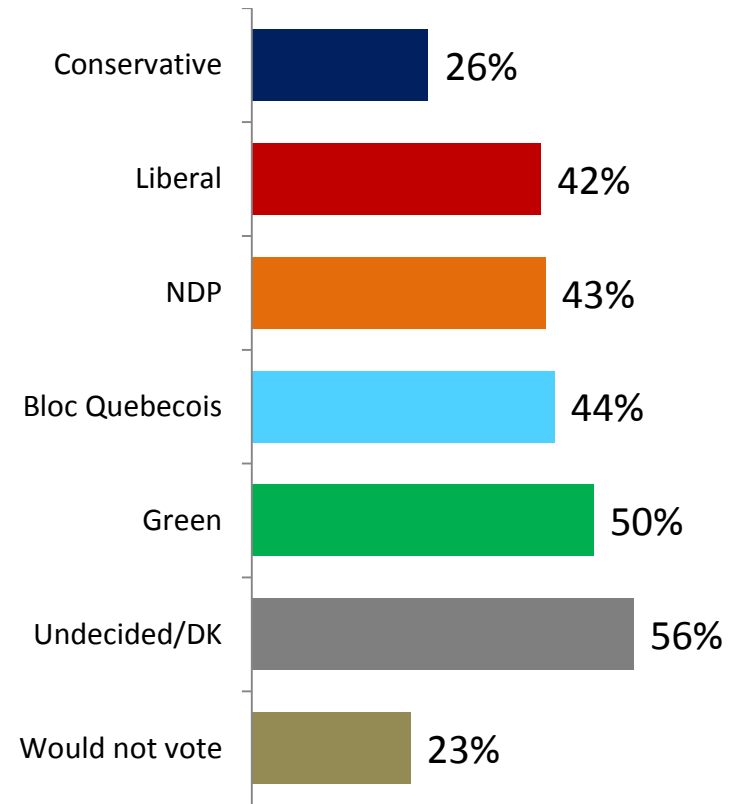
# Made up mind: half have made up their mind, steady in September; CPC most likely to have made up their minds



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



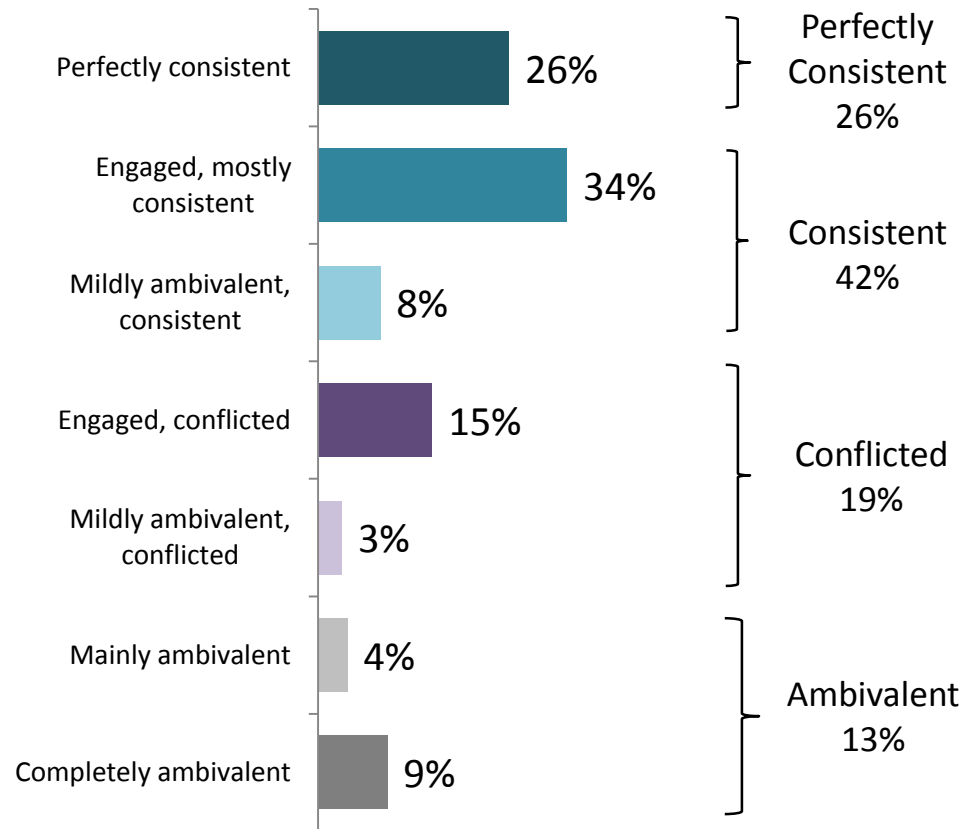
**% Would like to hear more**  
**By current combined vote choice**



■ Wave 2 (Aug '15) ■ Wave 3 (Sep '15) ■ Wave 4 (Sep '15)

# Consistency Segmentation

By measuring how consistent people are in which party they pick on the party and leader attributes (consistency) as well as how frequently they simply say they don't know which party to pick (ambivalence), we can understand both engagement and consistency of support for different parties.



# Made up Mind by Consistency: 6-in-10 conflicted voters are still making up their minds <sup>20</sup>

		Consistency Segmentation											
		Perfectly Consistent			Consistent			Conflicted			Ambivalent		
		Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15
Made up mind vs. Like to hear more	I have heard all I need	76%	79%	82%	41%	48%	54%	28%	35%	29%	17%	23%	14%
	I would like to hear more	21%	19%	16%	51%	45%	40%	65%	58%	64%	47%	42%	48%
	Don't know	3%	2%	2%	8%	7%	6%	8%	7%	7%	36%	35%	38%

# Combined Vote by Consistency: Consistent would vote CPC, NDP currently leading among Conflicted voters

Combined Vote	Consistency Segmentation												
		Perfectly consistent			Consistent			Conflicted			Ambivalent		
		Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15
Conservative	33%	33%	38%	29%	29%	30%	17%	12%	15%	9%	11%	9%	
Liberal	25%	32%	31%	25%	29%	28%	27%	25%	20%	7%	9%	10%	
NDP	35%	30%	25%	29%	27%	26%	31%	35%	32%	10%	13%	11%	
Bloc Quebecois	3%	2%	2%	4%	4%	3%	5%	5%	6%	1%	3%	1%	
Green	2%	2%	3%	5%	4%	5%	8%	13%	16%	5%	7%	5%	
Other	0%	0%	0%	1%	1%	1%	1%	1%	0%	1%	1%	3%	
Undecided /Don't know	1%	0%	1%	7%	6%	6%	9%	7%	8%	48%	38%	42%	
Would not Vote/ None	0%	0%	0%	1%	1%	1%	2%	2%	2%	18%	18%	19%	

# Likelihood to vote by Consistency: conflicted voters slightly less likely to vote, but majorities still say they definitely will

		Consistency Segmentation											
		Perfectly consistent			Consistent			Conflicted			Ambivalent		
		Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15	Wave 2: Aug '15	Wave 3: Sept '15	Wave 4: Sept '15
Likelihood to vote in upcoming election	Definitely	85%	87%	88%	72%	75%	74%	62%	66%	65%	28%	27%	31%
	Very likely	8%	7%	6%	15%	13%	14%	16%	14%	12%	11%	14%	11%
	Somewhat likely/DK	5%	5%	5%	9%	8%	9%	17%	13%	18%	30%	30%	29%
	Not very likely/ Definitely not	3%	1%	1%	4%	4%	3%	6%	7%	5%	30%	30%	29%

# Party Preferences – Online Only

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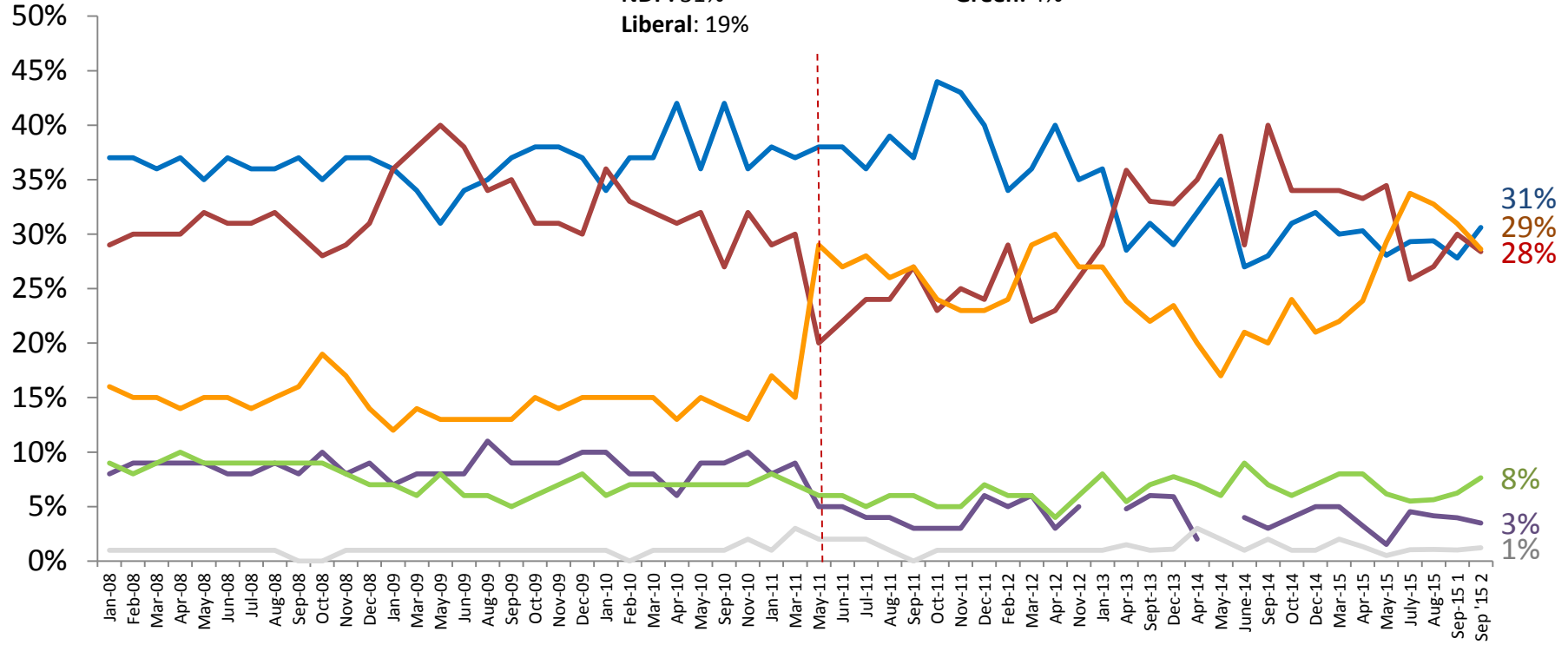
# Decided Federal Vote: CPC has taken the lead at 31% with NDP (29%) and Liberals (28%) virtually tied for second.



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED VOTE]

### May 2011 Federal Election:

Conservatives: 40%      BQ: 6%  
NDP: 31%                Green: 4%  
Liberal: 19%



- The Conservative Party
- The Liberal Party
- The New Democratic Party
- The Bloc Québécois
- The Green Party
- Another party





# Decided Vote by Region (column percentages)

	BC	Alberta	Prairies	Ontario	Quebec	Atlantic Canada
Conservative	32%	46%	36%	33%	19%	21%
Liberal	21%	21%	29%	36%	17%	46%
NDP	33%	28%	22%	23%	39%	25%
Bloc Quebecois					16%	
Green	13%	5%	12%	6%	7%	7%
Other	1%	1%	1%	2%	1%	

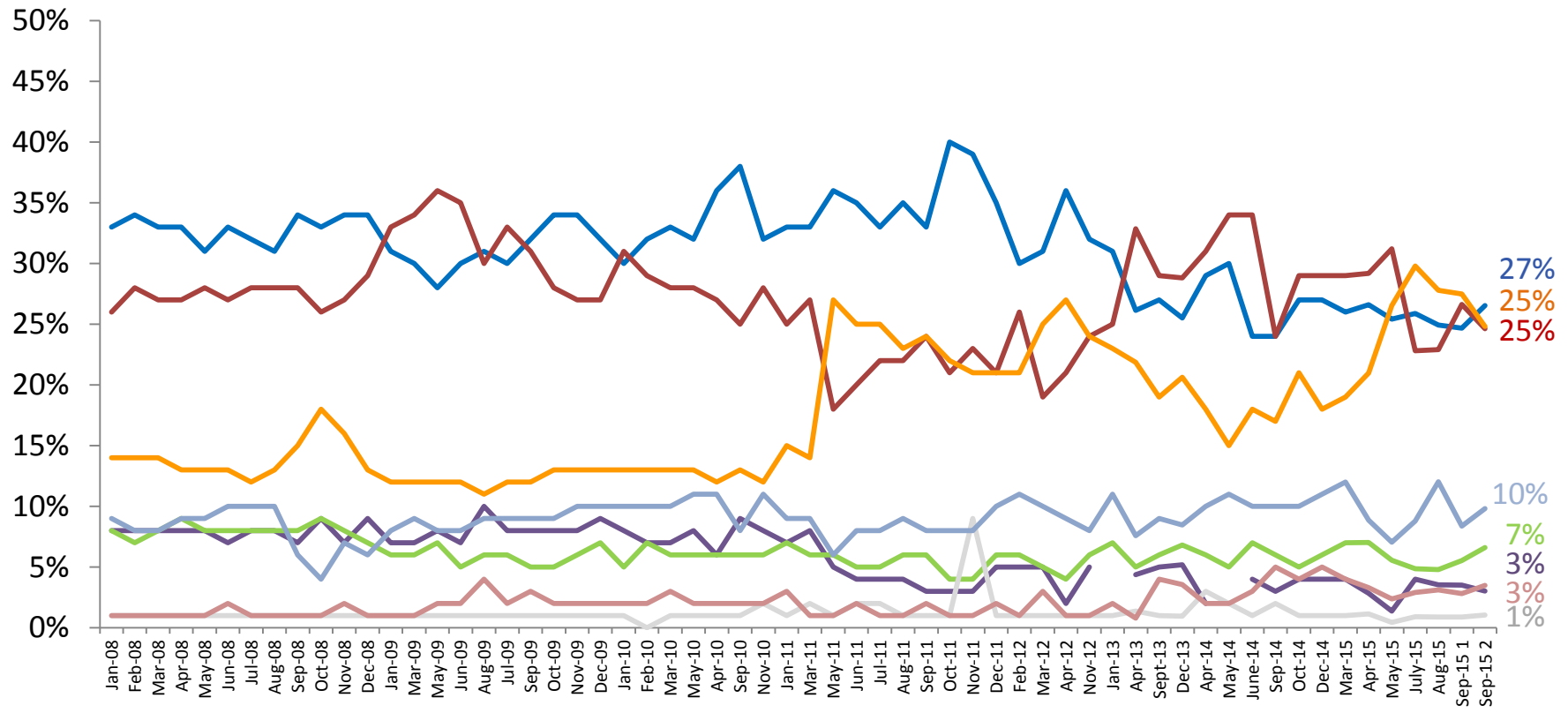
# Decided Vote by ID: NDP and CPC capture highest number of party identifiers, plurality of Unaligned would vote NDP

	Party Identification						
		Conservative	Liberal	NDP	Bloc	Unaligned	Green/Other
Federal Vote (Decided)	Conservative	84%	6%	2%	2%	20%	12%
	Liberal	7%	74%	9%	4%	26%	17%
	NDP	5%	17%	85%	22%	35%	25%
	Bloc	0%	0%	0%	70%	7%	2%
	Green/Other	4%	3%	4%	2%	12%	45%

# Combined Federal Vote: CPC slightly ahead at 27% with NDP and LPC tied for second at 25%; 10% still undecided



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]



- The Conservative Party
- The Liberal Party
- The New Democratic Party
- The Bloc Québécois
- The Green Party
- Another party
- Undecided / don't know
- Would not vote / none



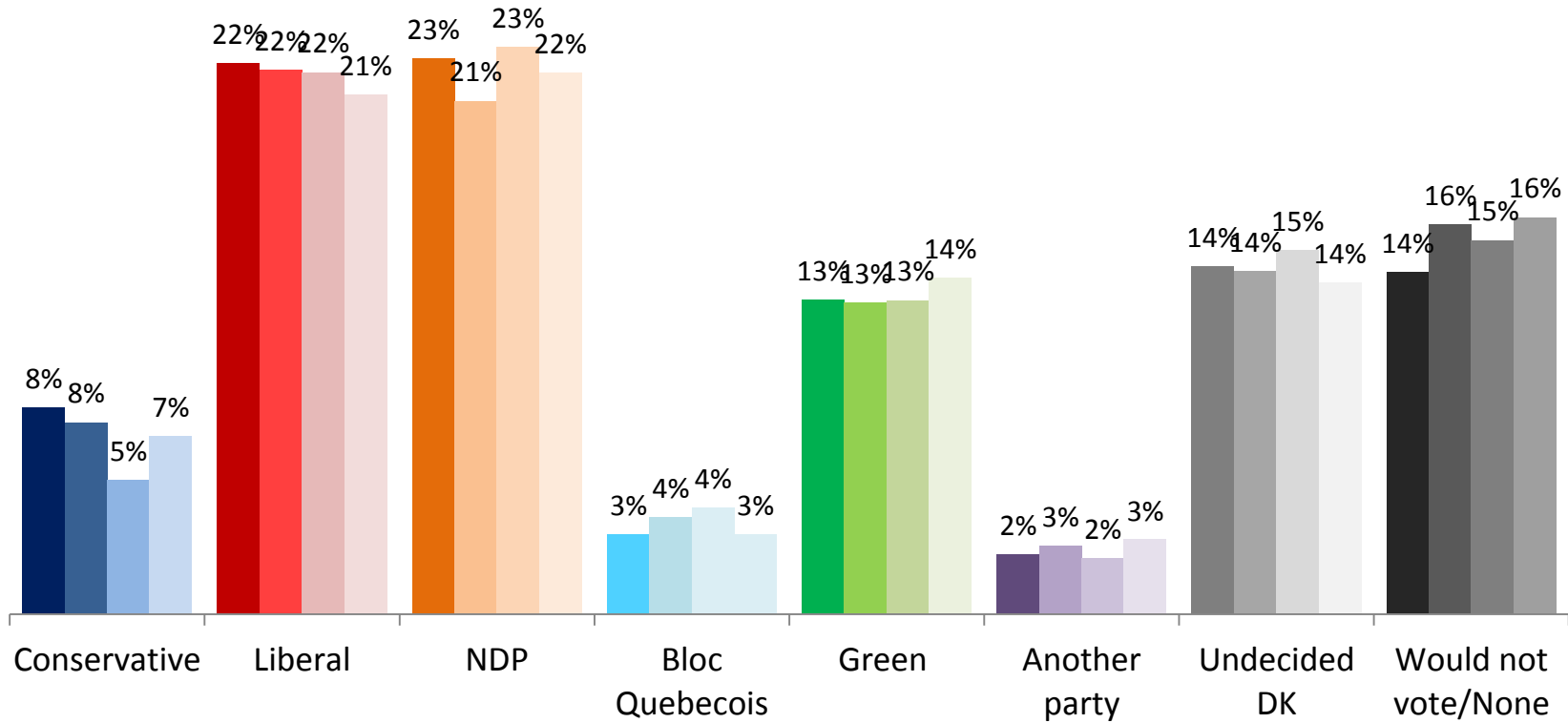
# Combined Vote by Region (column percentages): Libs and CPC neck-and-neck in Ontario

	BC	Alberta	Prairies	Ontario	Quebec	Atlantic Canada
Conservative	30%	40%	31%	30%	15%	18%
Liberal	20%	18%	25%	32%	13%	40%
NDP	31%	24%	19%	21%	30%	21%
Bloc Quebecois					13%	
Green	12%	4%	10%	6%	6%	6%
Other	1%	1%	1%	2%	1%	
Undecided/ Don't know	6%	8%	9%	7%	17%	11%
Would not Vote/ None	2%	4%	5%	3%	5%	4%

# Second choice: CPC second choice of 7% of voters, LPC and NDP tied for top second choice



And which party would be your second choice?



■ Wave 1 (July '15)  
 ■ Wave 2 (Aug '15)  
 ■ Wave 3 (Sep '15)  
 ■ Wave 4 (Sep '15)

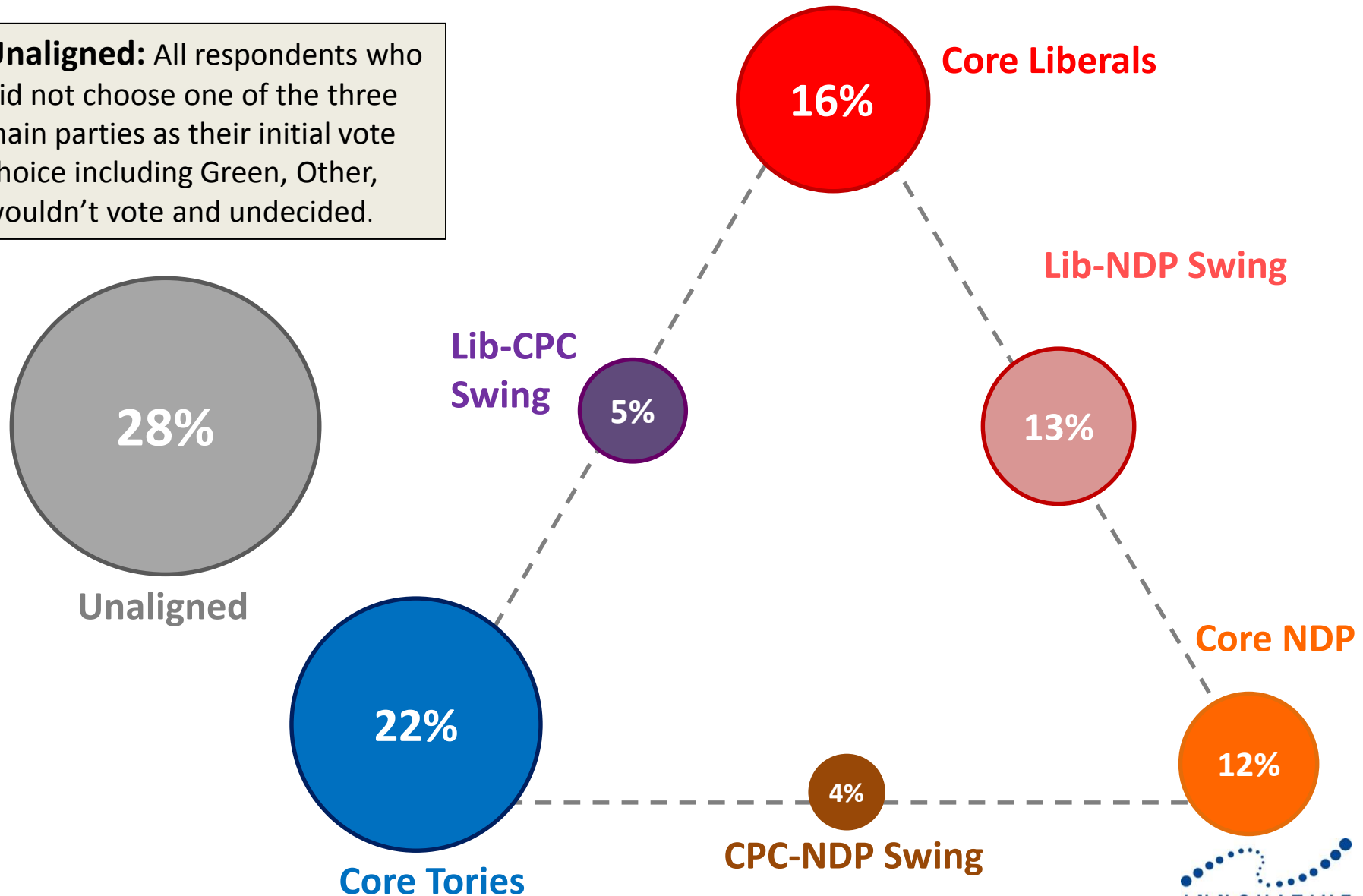
# Second Choice by Combined Vote: among Liberal voters, half (53%) choose NDP as 2<sup>nd</sup> choice.

Q And which party would be your second choice?

	CPC 1 <sup>st</sup> choice	LPC 1 <sup>st</sup> choice	NDP 1 <sup>st</sup> choice	BQ 1 <sup>st</sup> choice	Green 1 <sup>st</sup> choice
CPC 2 <sup>nd</sup> choice		12%	8%	17%	6%
LPC 2 <sup>nd</sup> choice	21%		48%	12%	28%
NDP 2 <sup>nd</sup> choice	18%	53%		32%	37%
BQ 2 <sup>nd</sup> choice	2%	1%	8%		5%
Green 2 <sup>nd</sup> choice	8%	19%	22%	17%	
Other	4%	1%	0%		4%
Undecided/DK	17%	9%	8%	13%	14%
Would not vote/None	30%	5%	5%	10%	5%

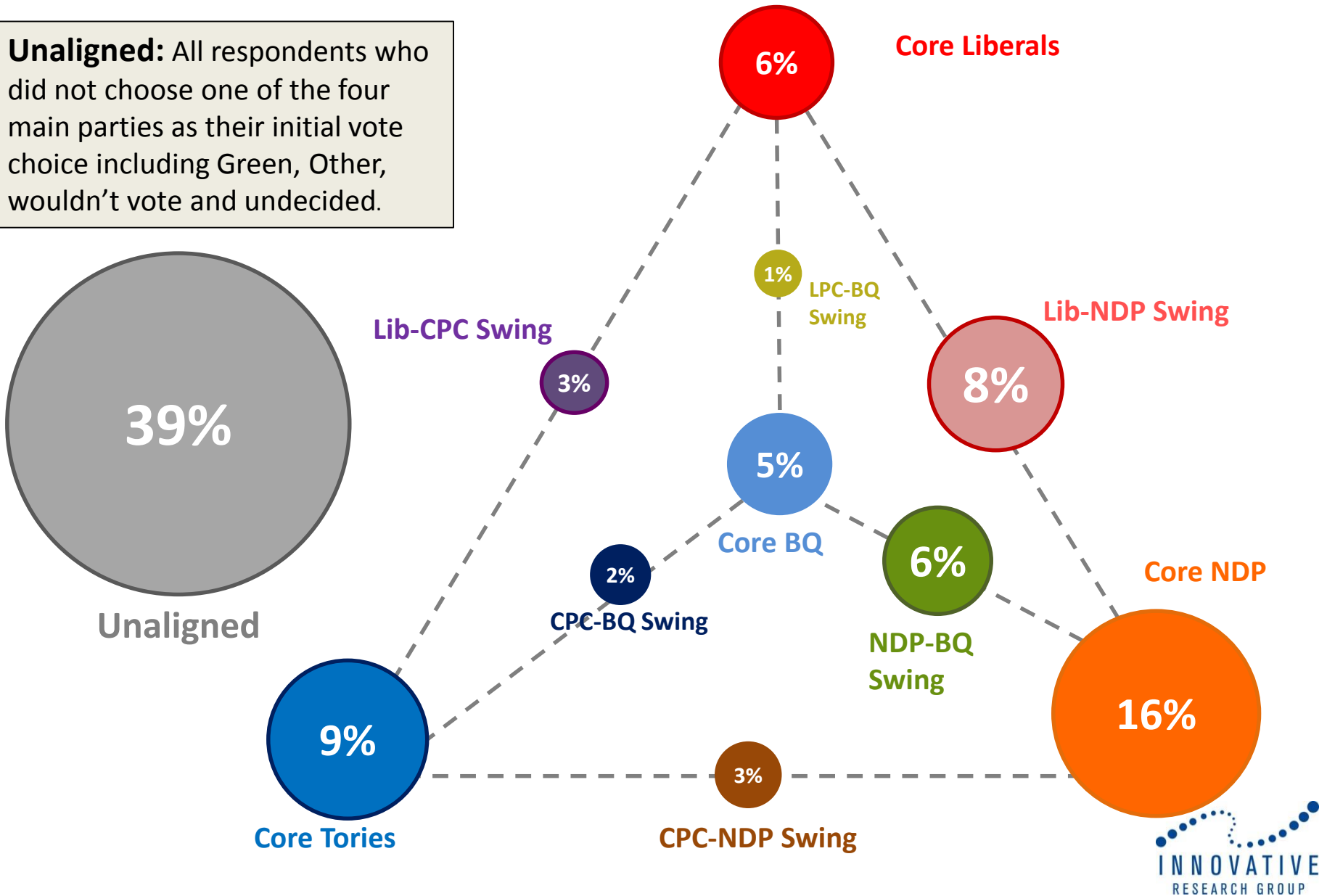
# Battleground Segments: Rest of Canada

**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.



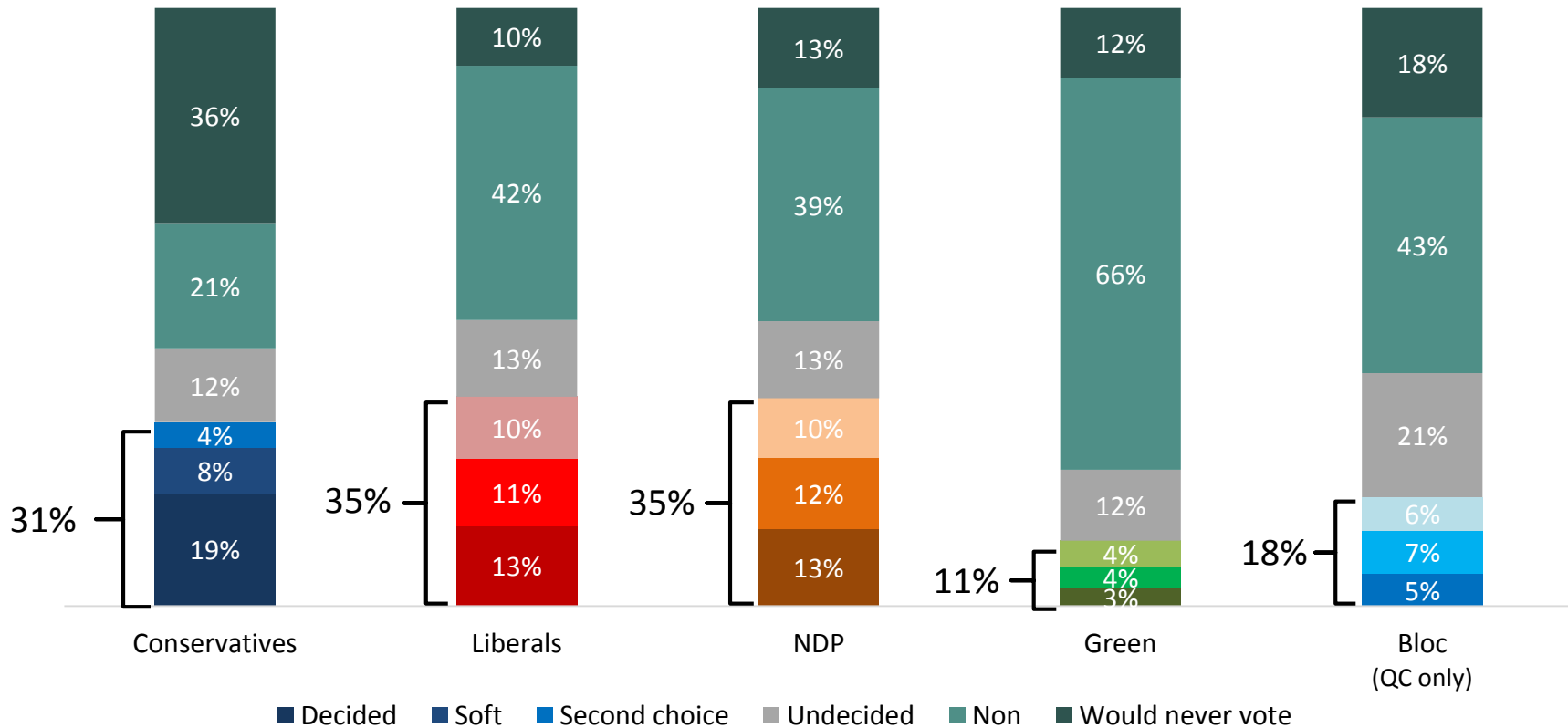
# Battleground Segments: Quebec

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





# Vote Potential: Now over 3-in-10 (31%) would consider voting CPC with LPC/NDP tied at 35%



**Decided:** Voting for a party, and have heard all they need to make up their mind  
**Soft:** Voting for the party, but would like to hear more before making up their mind  
**Second Choice:** The party is second choice, and they would like to hear more before making up their mind  
**Undecided:** Undecided voters, except those that fall into the “Never vote” category  
**Non-party:** Voting for another party and second choice is not for the party, or they have made up their mind  
**Would never vote:** All those who say they would never vote for the party are placed in this category.



## Research-based strategic advice.

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