

Public Opinion Research ▶▶

BC Provincial Election: Breaking poll results

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Executive Summary: BC Liberals are leading in the horse race

Vancouver, BC – Innovative Research Group Inc. (**INNOVATIVE**) released the findings of 3 election polls today:

- A Live-caller, mixed cell/landline RDD telephone survey of 600 British Columbian voters conducted from April 25th to April 30th
- An online panel survey of 500 British Columbians conducted from April 28th to May 1st
- An online panel survey of 1,000 British Columbians conducted from April 20th to April 23rd, 2017

The BC Liberals lead the BC NDP in all three polls by between 3 and 7 points in the combined vote (first choice + lean). The race remains too close to call but there is more upside for the BC Liberals than the BC NDP.

In addition to the results from the surveys themselves, **INNOVATIVE** has used a riding segmentation created by transposing the results of the 2013 and 2009 elections to the new electoral district boundaries to look at the shape of the race in BC's swing ridings.

	April 25 th to 30 th Telephone poll	April 28 th to May 1 st Online poll	April 20 th to April 23 rd Online poll
	30%	34%	32%
	26%	31%	25%
	16%	15%	12%
	5%	7%	7%
Other	2%	2%	1%
Undecided	5%	9%	21%
None/Would not vote	16%	2%	2%

Executive Summary: Several factors favour the BC Liberals

Several factors favour the BC Liberals:

- **BC Liberals show sustained strength in their large base of “safe” and “likely” seats.** The BC Liberals begin the campaign with 33 of the 44 seats they need for majority in a “safe” category. These are seats they won by 10 points or more in both previous elections. The BC Liberals have another 7 seats in a “likely” category. These are seats they won in both elections, once by more than 10 points. Although the Green party has been growing in every group of ridings, the BC Liberals retain a 21 point lead over their nearest competitor in with voters who live in their “safe” and “likely” seats. That is the same size of lead they enjoyed in the 2013 election.
- **The NDP show some vulnerability in their smaller base of “safe” and “likely” seats.** The BC NDP begin the campaign with only 22 of the 44 seats they need for majority in a “safe” category with another 7 in the “likely” category. While the NDP continue to hold a strong 19 point lead in those seats, that lead is down 11 points from 2013 which suggest some of their “likely” seats may be vulnerable.
- **The BC Liberals hold an 8-point lead in party identification – the political equivalent of brand loyalty.** This gives the Liberals a fundamental edge over the BC NDP which helps to explain why NDP election victories have been relatively rare.
- **Time for a change lacks intensity.** While time for a change sentiments are running high (66% agree it is time for a change), more detailed probes show the intensity behind that sentiment is quite a bit smaller (28% strongly agree the most important thing is to get rid of Christy Clark and the BC Liberals; only 30% in total agree they are so angry at the BC Liberals, they will never vote for them again).
- **Christy Clark best on competence attributes.** On questions such as showing strong leadership, representing BC in the world, or dealing with Donald Trump, Clark has a significant lead over Horgan and Weaver. This means that when events such as softwood lumber take center stage, Clark benefits.
- **The pre-writ Liberal negative ads on Horgan worked.** Compared to numbers from September more than twice as many voters say Horgan is the leader best described as someone who flip flops and makes unrealistic promises. This now puts him on par with Christy Clark on these negative attributes. He is now ahead of Clark on which leader is “Too negative” by 8 points with most of that change appearing in the last week.

Executive Summary: Some potential upside for the NDP

It's not all coming up roses for the Liberals. The NDP have some good news as well.

- **There is a small shift to the NDP from the Liberals in the 16 swing seats where small shifts matter.** The shift is small. In the 2013 election, the Liberals were 2 points ahead in these seats while the NDP is now up by 2 points instead (both parties are down overall with a big increase in the Green vote). The important thing is that the election is playing better for the NDP in the battleground seats than their base seats. In part this is a regional story as the Greens are growing most on Vancouver Island which is the NDP's best region,
- **The NDP campaign has been doing better at emotionally connecting with voters.** Our earlier 1,000 person online study explored whether how what voters have read, seen or heard about the campaign makes them feel. NDP loyalists were twice as excited about the Horgan's NDP campaign as Liberals were about Clark's BC Liberal campaign.
- **More people are committed to kicking the Liberals out (38%) than want to stop the NDP from winning (22%).** Passion equals action. The NDP have a larger group of impassioned voters to draw upon than the BC Liberals. For the Greens, just 10% say a pox on both the Liberal and NDP houses.
- **Most voters see the election as a fight between the NDP and the Liberals (67% agree).** What we saw in the 2011 federal election is that the key shift that allowed the NDP breakthrough was a decline in the number of people agreeing that election was a fight between the CPC and the Liberals. You can like the Greens and their leader, but if you don't think they are in the race, you are less likely to vote for them.
- **Horgan has a strong lead over Clark on cares about people like me.** 27% pick Horgan on this attribute compared to just 15% for Clark. Stories such as the #IamLinda drive a comparison that helps the NDP.

A key issue in this campaign is vote splitting on the centre left.

- **The Green base is among Core Left voters.** When we grouped respondents to our first online survey based on their values, we found one-in-five BCers share core Left values. They believe in redistributing wealth, don't trust the profit motive and want the government to play an active role in the economy. While the NDP can normally count on these voters, in this election they have only 43% of their support while the Greens are winning 25% of them.
- **The Greens are also pulling support from the "Anybody but BC Liberal (ABL)" voters according to both the phone and online polling.** The vote splitting is not as large in the ABL vote, but in the telephone poll there are still 18% of these angry voters voting Green while 54% are voting NDP. On the other hand, the Liberals enjoy 77% support among "Anybody but NDP" voters. The same pattern is seen in the online polling.

Executive Summary: The bottom line

With their strong base of “safe” and “likely” seats and their competitive position in swing seats, the Liberals are well positioned for a win at this point in the election. However, an NDP victory is still possible:

- 40% of the electorate say they want to hear more before making up their minds. This is almost exactly the same number we saw at this point in the 2012 Alberta election, before a surprise PC upset at the very end of the campaign.
- Most of the uncertainty lies on the centre left, particularly among Green voters. Many of these Green voters are angry at the Liberals and some see the election as a two horse race, even though they are currently saying they will support the Greens.

A minority with a Green balance of power also can't be ruled out. The challenge there is they have to do well enough in the south island to win seats without splitting the anti-liberal vote in the rest of the province.

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BC Election Release

This BC Election release includes results from 3 new Innovative Research Group surveys conducted over the past two weeks.

These include two online surveys and one live-caller, mixed cell and landline telephone study.

Study	Sampling method	N size	Dates
Telephone study	Live-caller, mixed cell/landline	600	April 25 th to April 30 th
Online, May 1 wave	Online survey	500	April 28 th to May 1 st
Online, April 23 wave	Online survey	1,000	April 20 th to April 23 rd

Phone Methodology

- Our telephone survey was conducted , from April 25th to 30th, 2017 using live-caller interviews to landline and cellular telephones
- 606 randomly-selected British Columbia residents, 18 years of age and older were included in the sample.
- Only one respondent per household was eligible to complete this survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.
- The sample has been weighted to n=600 by age, gender and region using the latest available data, 2011 Census, to reflect actual demographic composition of the population.
- The margin of error is approximately $\pm 4.0\%$, 19 times out of 20.

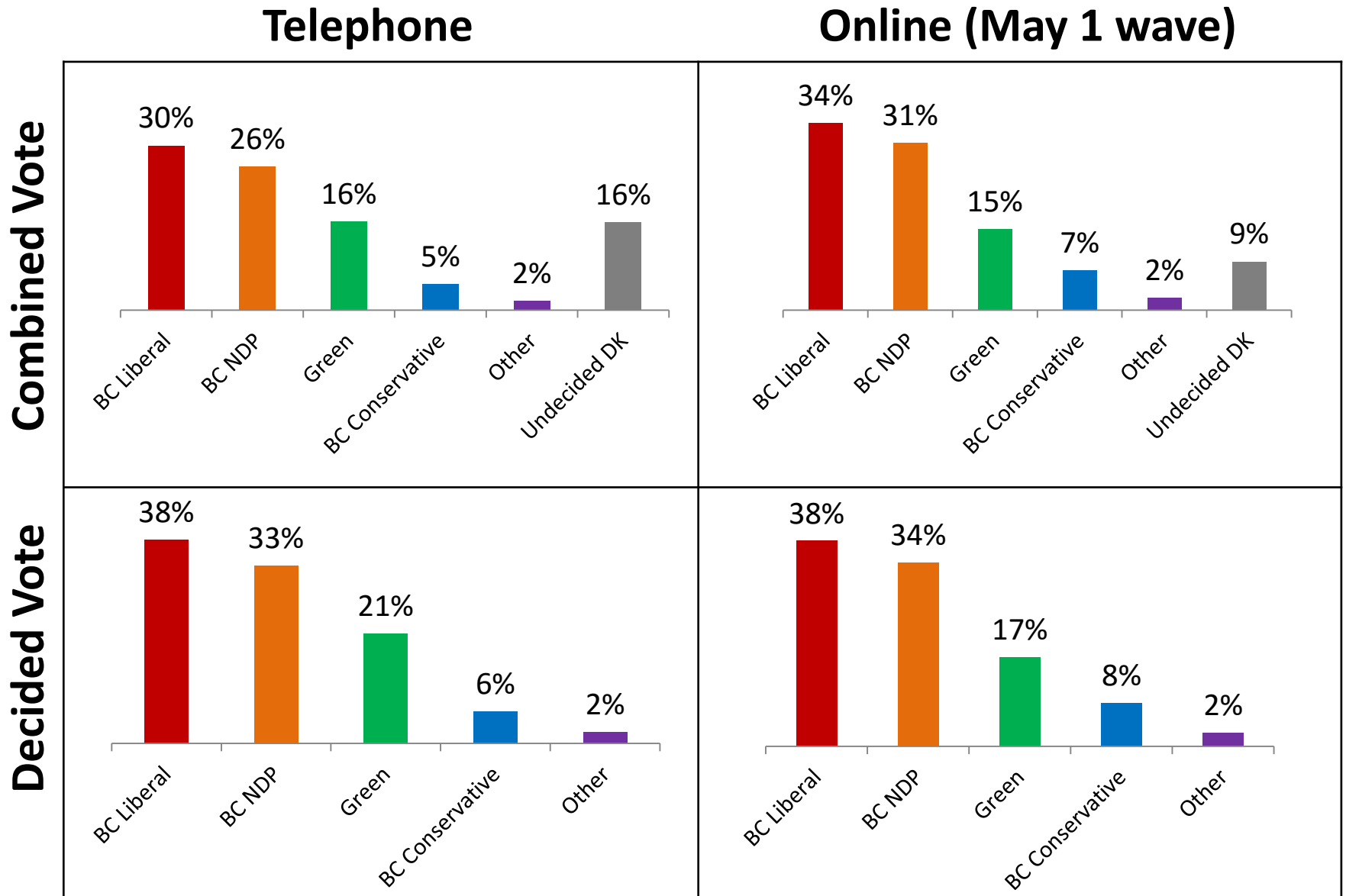
Note: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Online Methodology

- These are the findings of two new Innovative Research Group (INNOVATIVE) online polls. The first survey was conducted from April 20th to April 23rd, 2017 (April 23 wave). The second wave took place from April 28th to May 1st, 2017 (May 1 Wave). The results also include tracking from INNOVATIVE's monthly online Canada This Month surveys since 2013.
- The both surveys were conducted on INNOVATIVE's Canada 20/20 national research panel with additional sample from SSI, a leading provider of online sample. The April 23 wave interviewed 1,104 British Columbians; the May 1 wave interviewed 546 British Columbians.
- The results of the April 23 wave are weighted to n=1,000; and the results of the May 1 wave are weighted to N=500. Weights are based on Census data from Statistics Canada.
- 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. 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, because the online survey was not a random probability based sample, a margin of error cannot 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.*

Decided Vote Comparisons: Telephone vs Online



NOTE: "Refused" / "Would not vote" not shown

Decided Vote Data Comparison

While the phone survey sees higher Green support, decided provincial vote intent is generally consistent across both data sources.

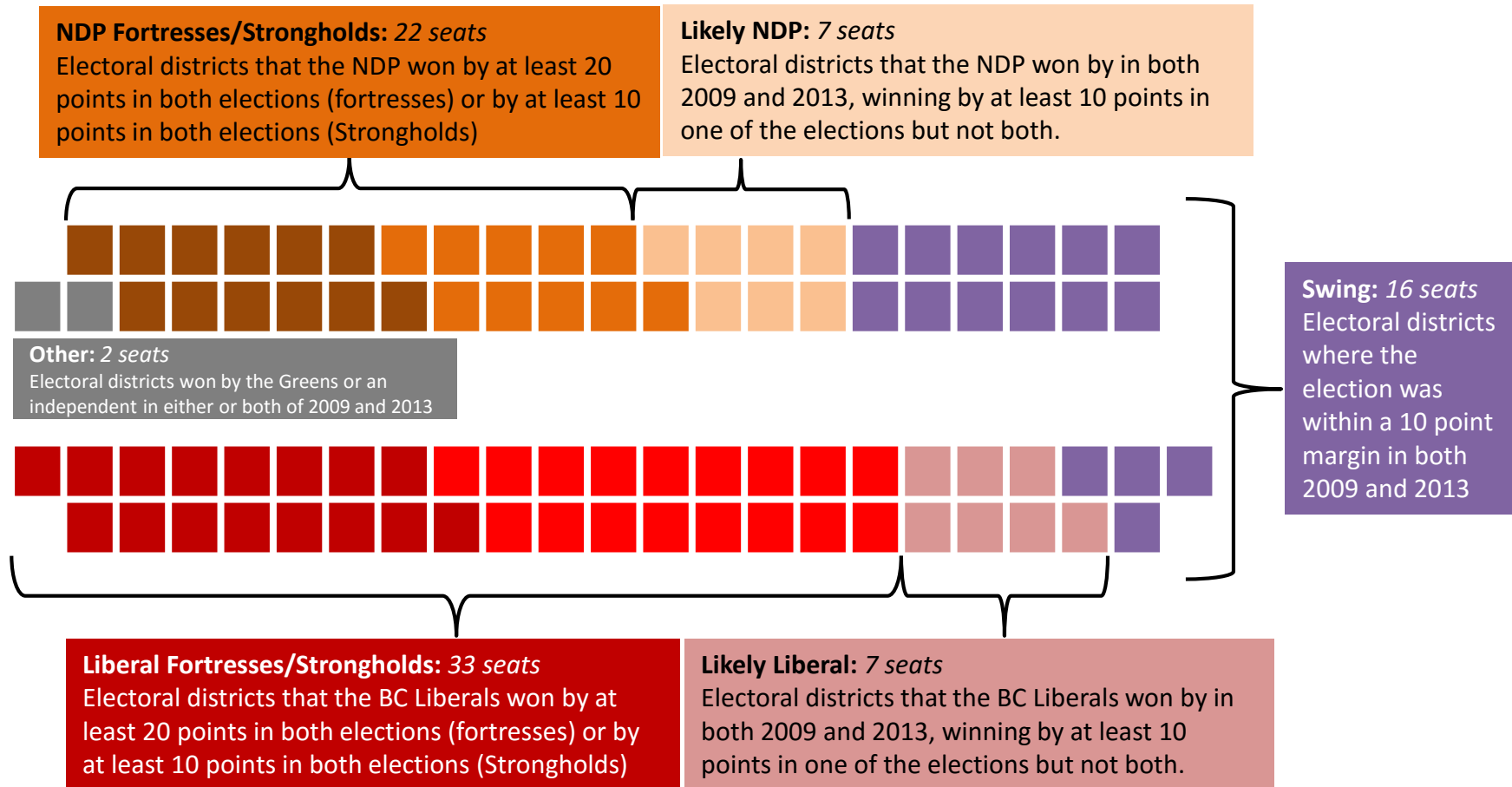
	RDD Telephone	Canada 20/20 Online	Difference
BC Liberal	38.1%	38.4%	+0.3%
BC NDP	33.2%	34.4%	+1.2%
Green	20.5%	16.6%	-3.9%
BC Conservative	6.0%	8.1%	+2.1%
Other	2.1%	2.5%	+0.4%



Counting Seats, Not Votes

We count seats not votes: 44 seats are needed for a bare majority and the BC Liberals start out with 33 “safe” seats

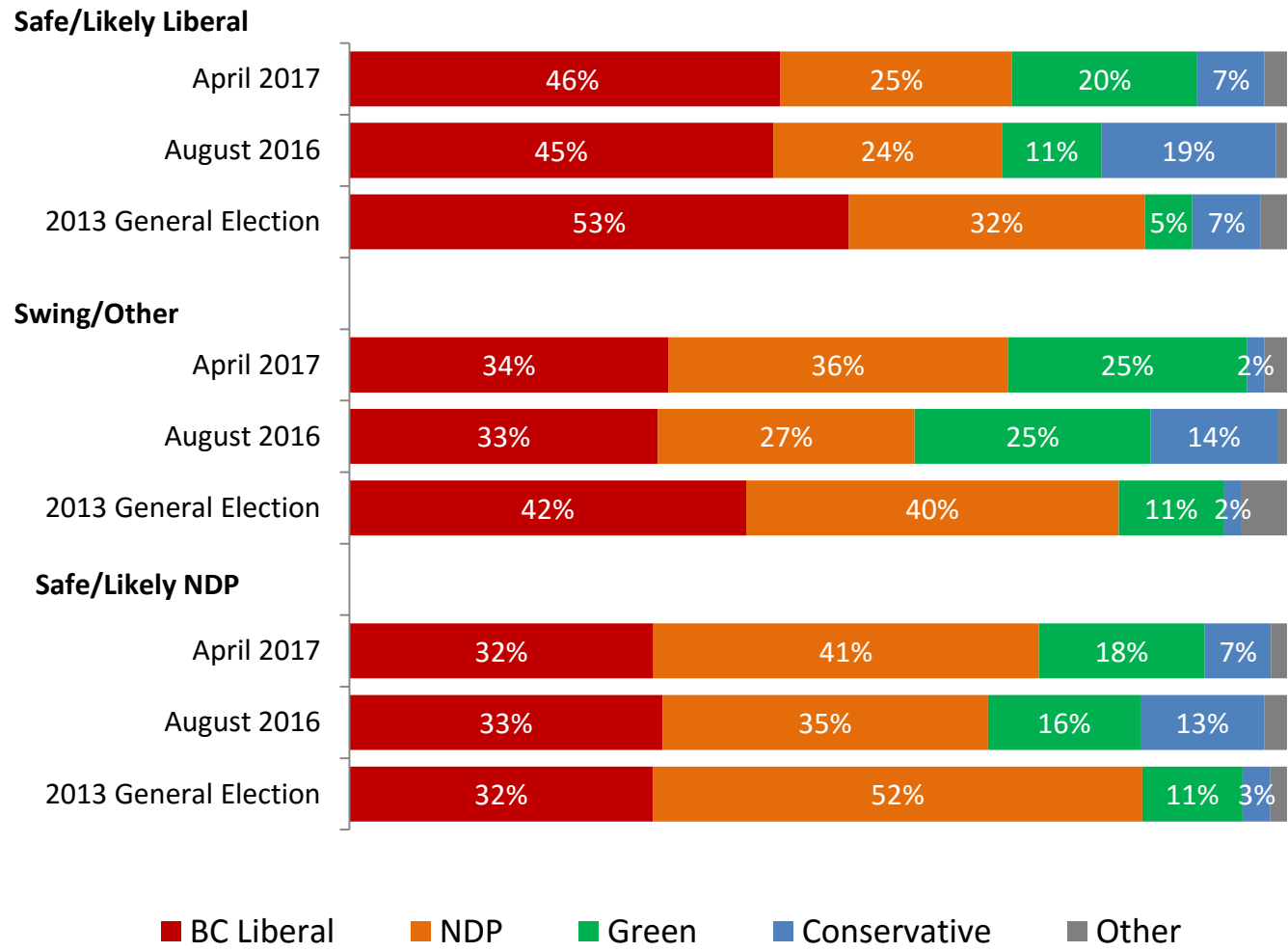
In the 87 electoral districts up for grabs in the 2017 election, we have identified 6 groups based on the 2009 and 2013 election results in the ridings.



Decided vote by district type: NDP edge ahead in swing seats, NDP lead drops 10 points in “safe” and “likely” seats

BC provincial decided vote

[Asked of all respondents; N=600 both waves]



2013 Seats won*

	Liberal	NDP	Green	Ind.
Safe/Likely Liberal	40	0	0	0
Swing/Other	10	6	1	1
Safe/Likely NDP	0	29	0	0

*2013 results are estimated based on a redistribution of 2013 results to the new riding boundaries.



Party Identification

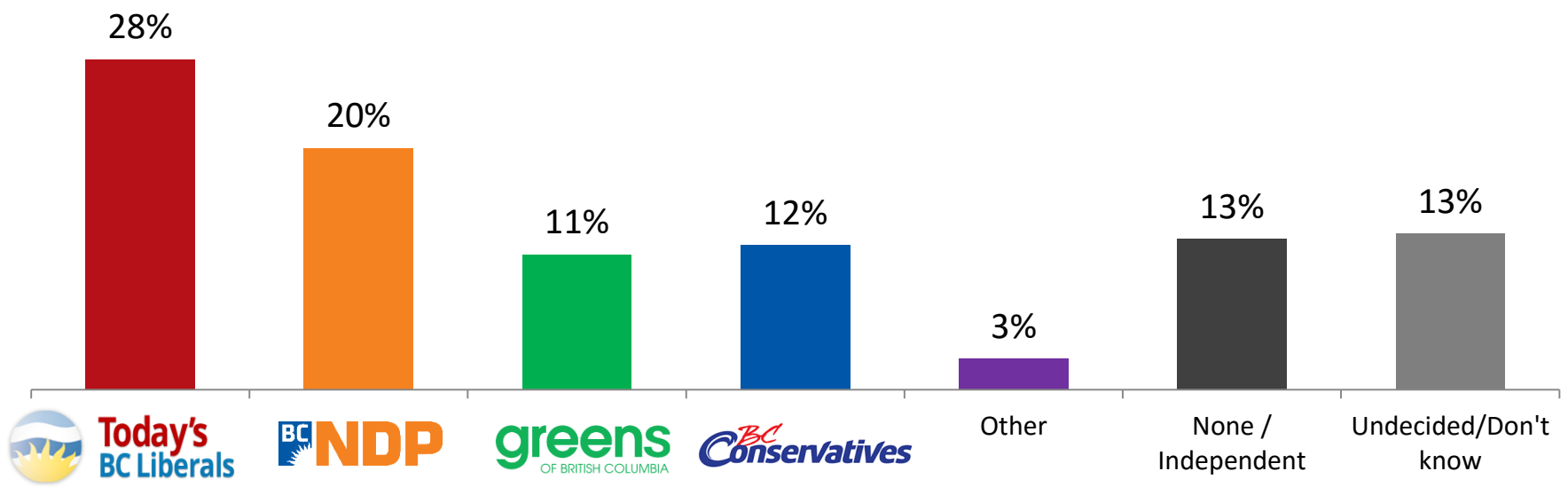


Results from April 25 to 30th telephone survey



Provincial Voter ID: 28% identify themselves as BC Liberals, 20% as NDP-ers; 11-12% as Greens and BC Conservatives

Q Thinking about provincial politics in British Columbia, generally speaking, do you usually think of yourself as a..?
[asked of all respondents; n=600]



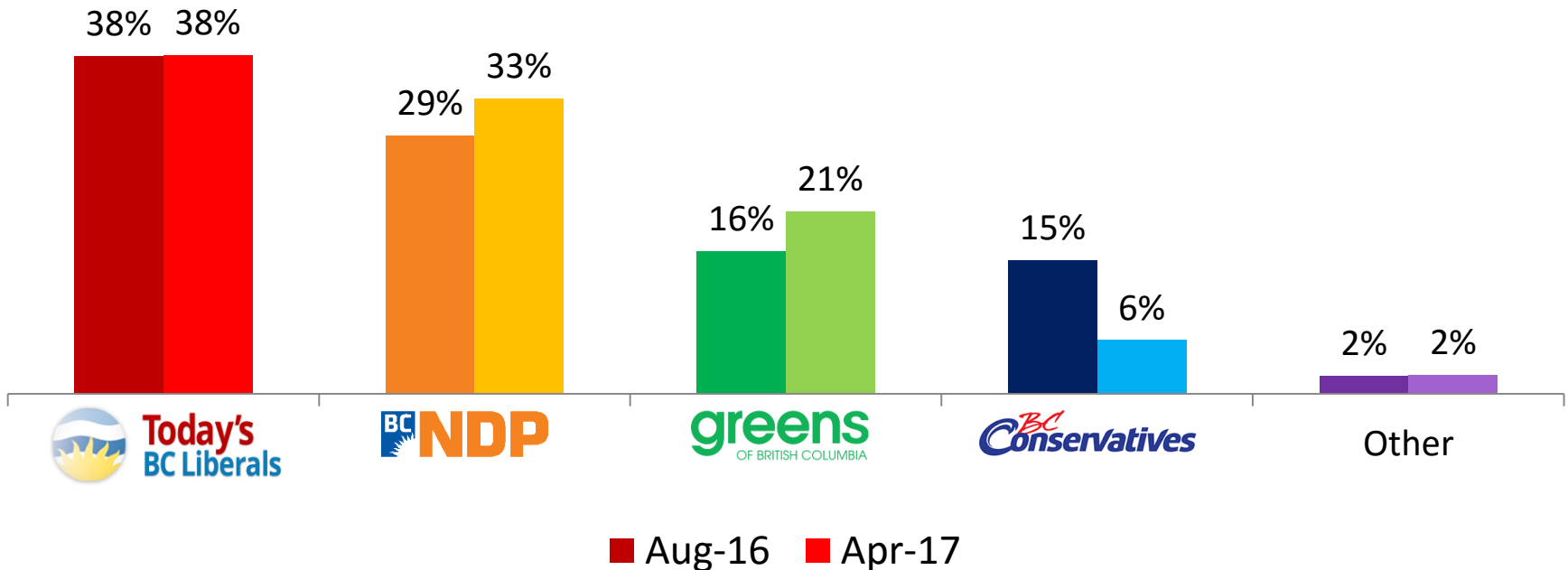
Vote Preference Snapshot



Results from April 25 to 30th telephone survey

Provincial Decided Vote: BC Liberals decided vote remains steady, up slightly for 4-5 points for NDP and Green

Q If a provincial election were held today, which party would you vote for: [RANDOMIZED] the BC Liberal Party, the BC Conservative Party, the BC New Democratic Party, the Green Party of BC, or another party?
... In that case, which party do you lean toward slightly? **[Decided Vote]**



Decided vote by region: Liberals and NDP both down compared to 2013 election results due to Green surge

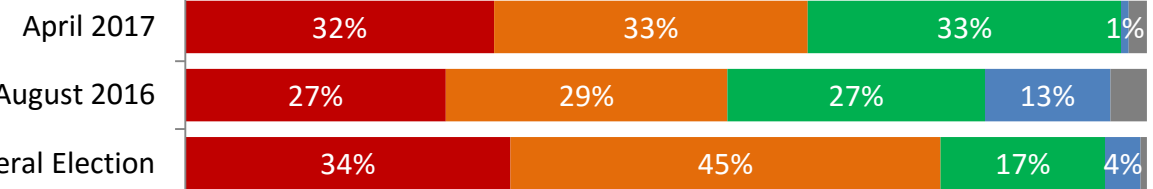
BC provincial decided vote

[Asked of all respondents; N=600 both waves]

Lower Mainland/Fraser Valley



Vancouver Island/Sunshine Coast



Interior/North



■ BC Liberal ■ NDP ■ Green ■ Conservative ■ Other

2013 Seats won*

	Liberal	NDP	Green	Ind.
Lower Mainland/Fraser Valley	30	17	0	1
Vancouver Island/Sunshine Coast	2	12	1	0
Interior/North	18	6	0	0

*2013 results are estimated based on a redistribution of 2013 results to the new riding boundaries. The two seats not won by the BC Liberals or NDP in 2013 are not included in this analysis.



Decided Vote by Party ID: Unaligned voters are split 3-ways with a slight edge to the Liberals

		Party Identification				
		BC Liberal	NDP	Green	Other	Unaligned
Decided Vote	BC Liberal	74%	7%	4%	44%	37%
	NDP	15%	79%	19%	14%	28%
	Green	9%	9%	75%	7%	31%
	BC Conservative	3%	0%	2%	31%	1%
	Other	0%	4%	0%	4%	2%

Note: Table shows column percentages

Provincial Vote – Second Choice: Greens choose NDP as their second choice by a over a 2 to 1 margin over the Liberals

Q And which party would be your second choice? By Decided Vote
[asked of all respondents who decided their first choice, n=474]

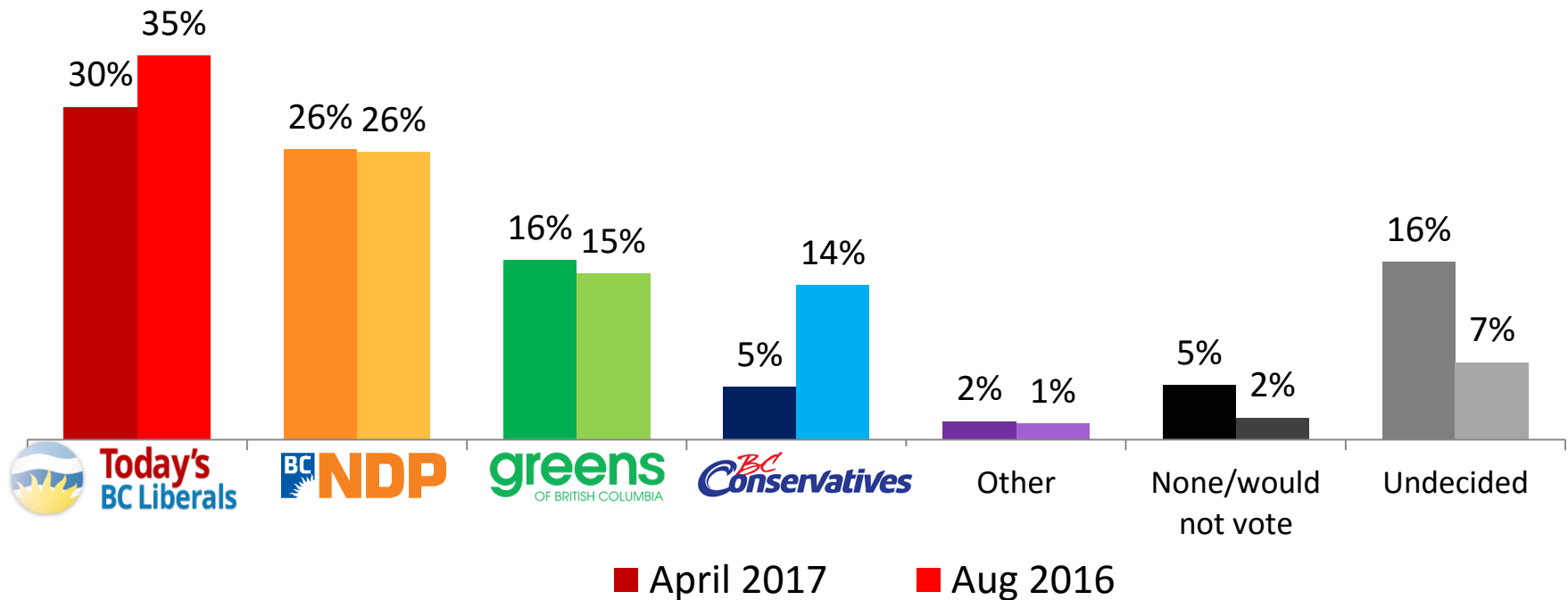
	First Choice: BC Liberal	First Choice: NDP	First Choice: Green	First Choice: BC Conservative
Second Choice: BC Liberal	--	16%	18%	36%
Second Choice: NDP	17%	--	43%	7%
Second Choice: Green	23%	55%	--	9%
Second Choice: BC Conservative	24%	4%	7%	--
Second Choice: Other	2%	2%	1%	3%
Second Choice: Would not vote	23%	16%	13%	14%
Second Choice: Undecided/DK	11%	9%	16%	32%

Combined Provincial Vote: BC Liberal vote as declines as undecided grows since summer



If a provincial election were held today, which party would you vote for: [RANDOMIZED] the BC Liberal Party, the BC Conservative Party, the BC New Democratic Party, the Green Party of BC, or another party?
... In that case, which party do you lean toward slightly? [**Vote + Lean**]

[asked of all respondents; n=600]



Combined vote demographics: Libs in decline among male 35-54, increase among women 55+, NDP rise for women 35-54

		Age / Gender					
		Male 18-34	Male 35-54	Male 55+	Female 18-34	Female 35-54	Female 55+
Combined Vote	BC Liberal	37%	29%	46%	26%	22%	22%
	NDP	19%	30%	26%	20%	28%	30%
	Green	18%	10%	13%	18%	18%	20%
	BC Conservative	4%	10%	0%	4%	4%	5%
	Other	0%	3%	1%	4%	2%	0%
	Would not vote	7%	4%	1%	6%	6%	6%
	Undecided/DK	15%	14%	12%	22%	19%	16%

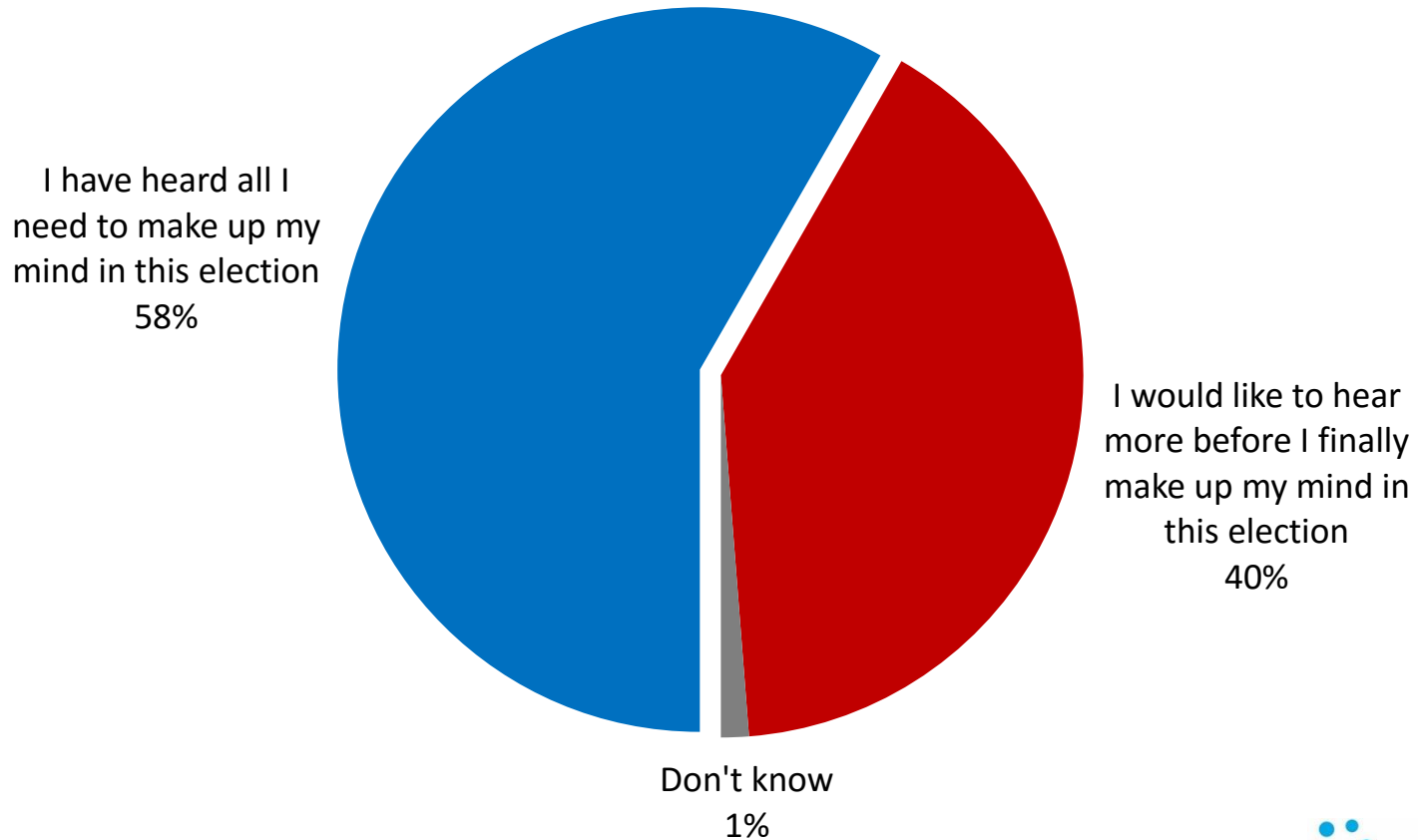
Note: Table shows column percentages

Made up your mind: Still potential for significant shifts in final week, same level as openness as 2012 Alberta election



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

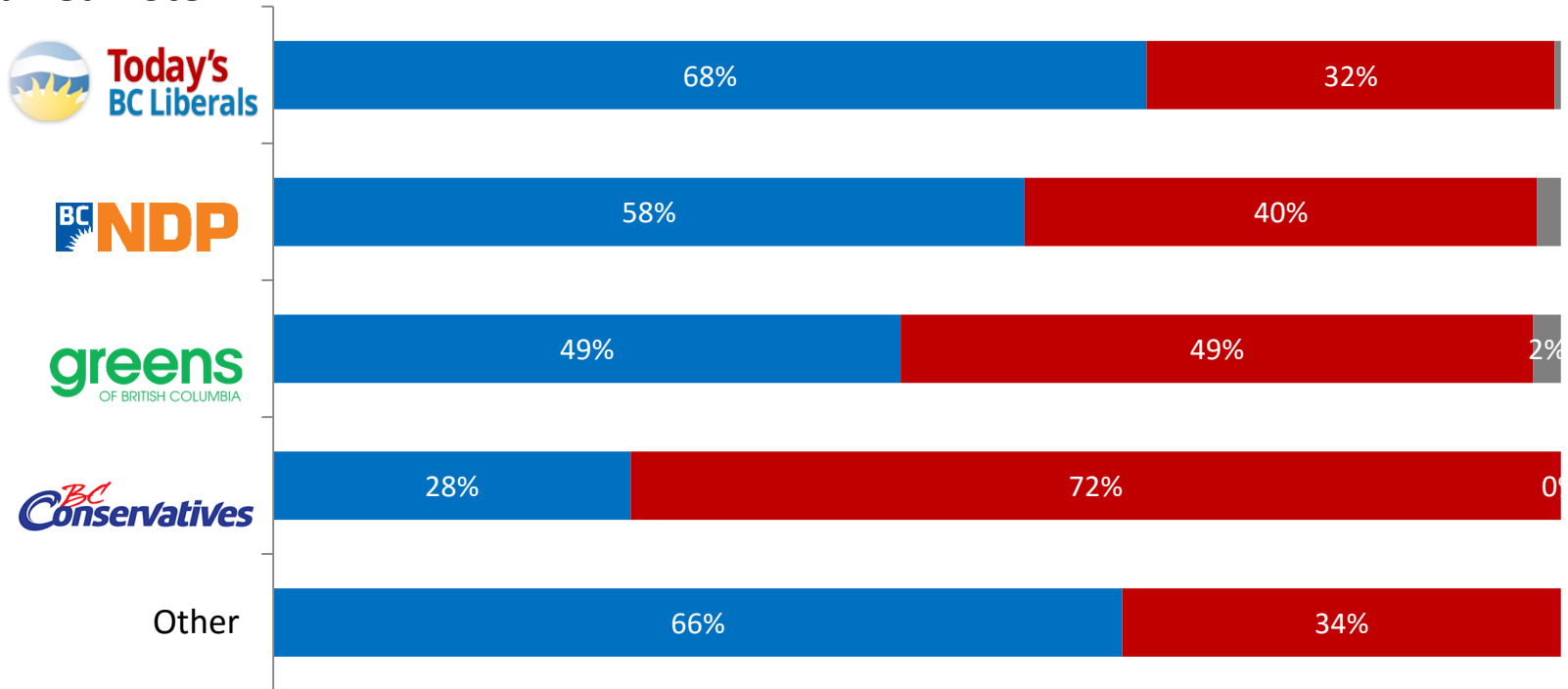
[asked of all respondents who decided their first choice, n=474]



Liberals have the firmest vote, more openness to change among centre left voters

Firmness of Vote by Combined Vote

Combined Vote



- I have heard all I need to make up my mind in this election
- I would like to hear more before I make up my mind in this election



**Strategic Considerations:
Time for a Change**

Time for a change: Net agreement towards TfC has remained steady, agreement re Liberals as best has decreased

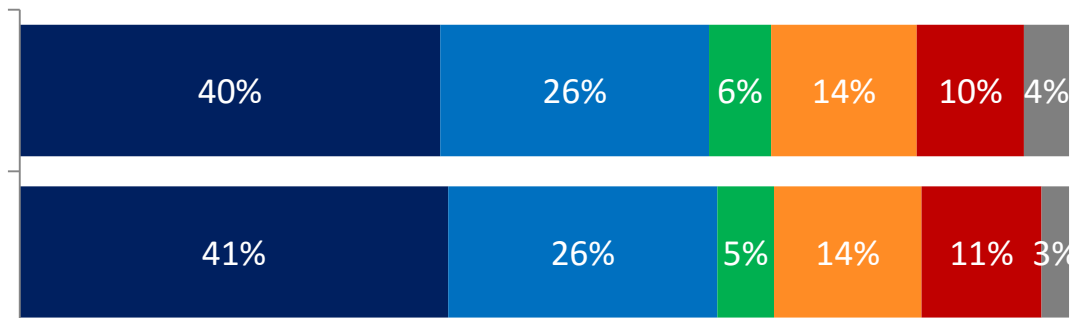


Do you agree or disagree with the following statements?
[asked of all respondents; n=600]

Net Agree

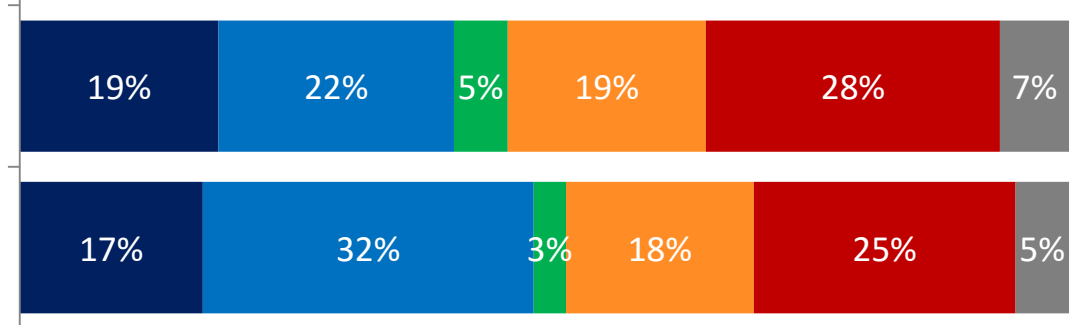
It is time for a change in government here in British Columbia.

April 2017
August 2016



The Liberals may have their problems but they are still the best party to form government

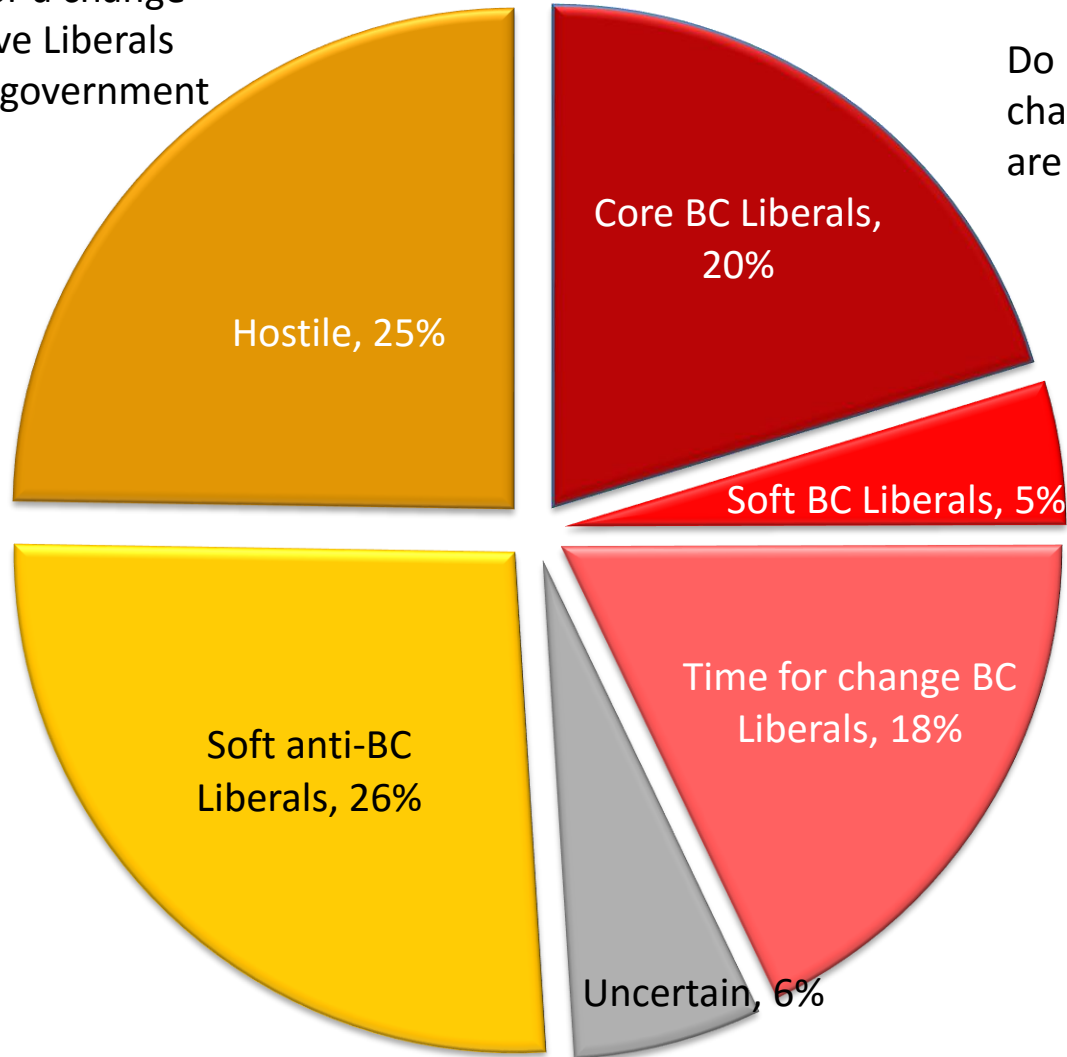
April 2017
August 2016



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

Time for Change Segmentation

Think it is time for a change
and do not believe Liberals
are best to form government



Do not think it is time for a
change and agree Liberals
are best to form government

Think it is time for a change
but believe Liberals are still
best to form government

Note: due to small sample size, in additional analysis the following categories are collapsed together: 1) Core BC (20%)/Soft BC (5%); and 2) Uncertain (6%)/Soft anti-BC (26%).

TfC BC Liberals less inclined to vote BC Liberal, Hostile more likely to vote NDP and Green

Combined Vote BY Time for a change segmentation

Time for a change segmentation

		Core/Soft BC Liberals		TfC BC Liberals		Soft anti-BC Liberals		Hostile	
		Aug '16	Apr '17	Aug '16	Apr '17	Aug '16	Apr '17	Aug '16	Apr '17
Combined Vote	BC Liberal Party	76%	77%	52%	47%	9%	6%	2%	2%
	BC Conservative Party	9%	2%	9%	4%	20%	9%	18%	4%
	BC NDP	4%	4%	15%	13%	31%	31%	55%	60%
	Green/Other	7%	4%	17%	14%	20%	27%	19%	27%
	Undecided/Would not vote	3%	13%	7%	22%	19%	26%	6%	7%

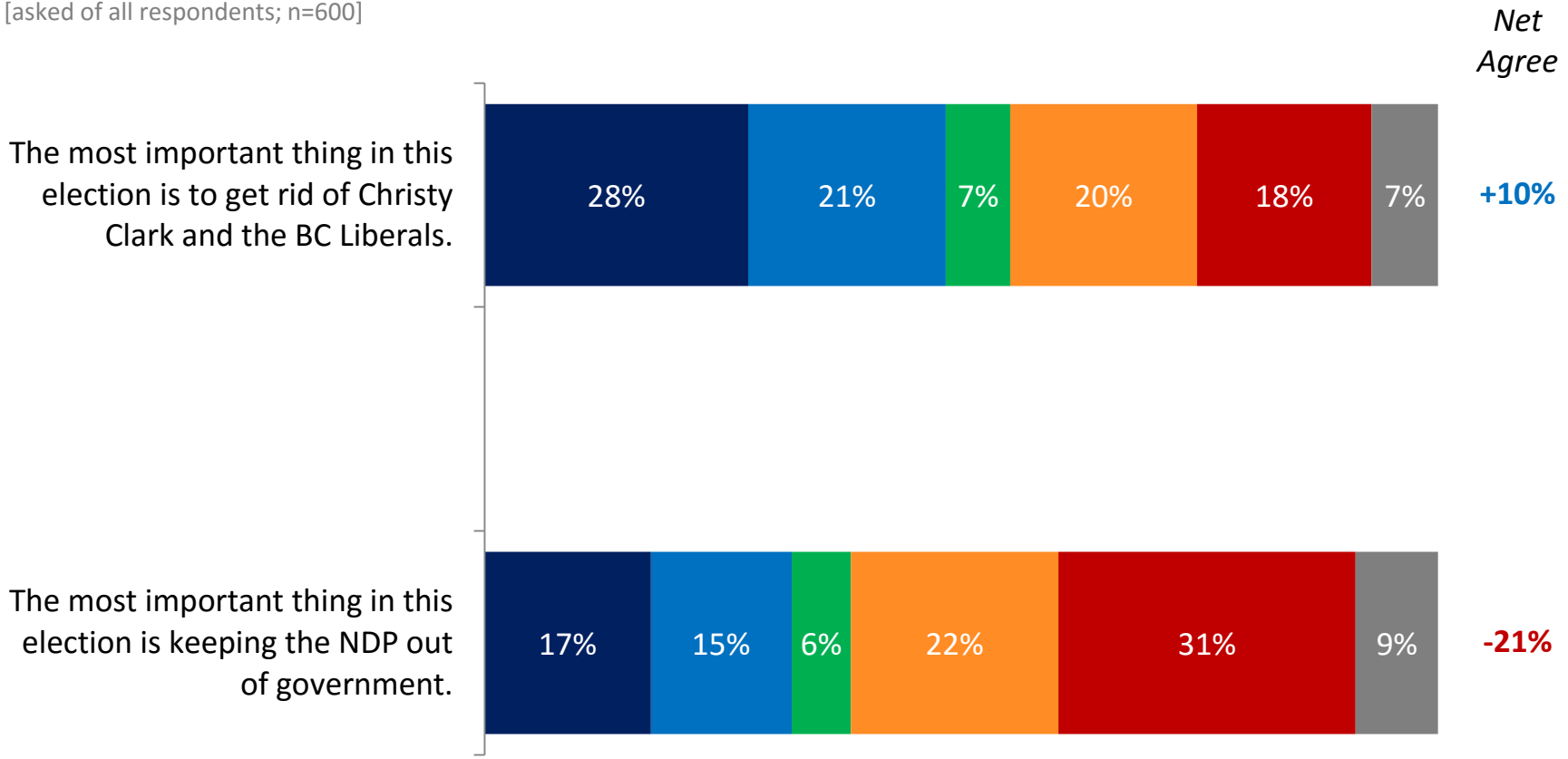


**Strategic Considerations:
Anybody but...**

Anybody but ... : almost 3-in-10 strongly agree with a change in government, and strongly disagree with keeping NDP out



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



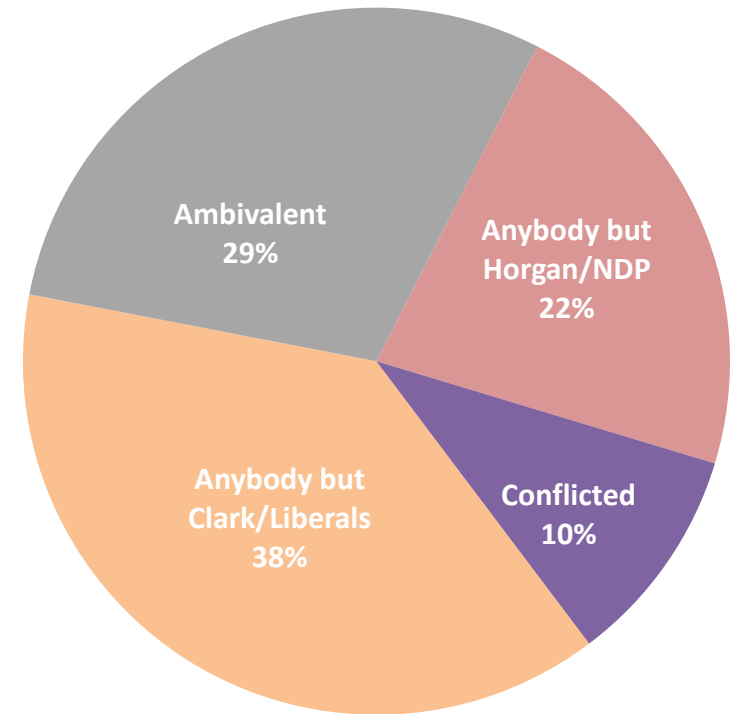
Strongly agree Somewhat agree Neither agree nor disagree
Somewhat disagree Strongly disagree Don't know

Anybody but ... segmentation

The most important thing in this election is keeping the NDP out of government

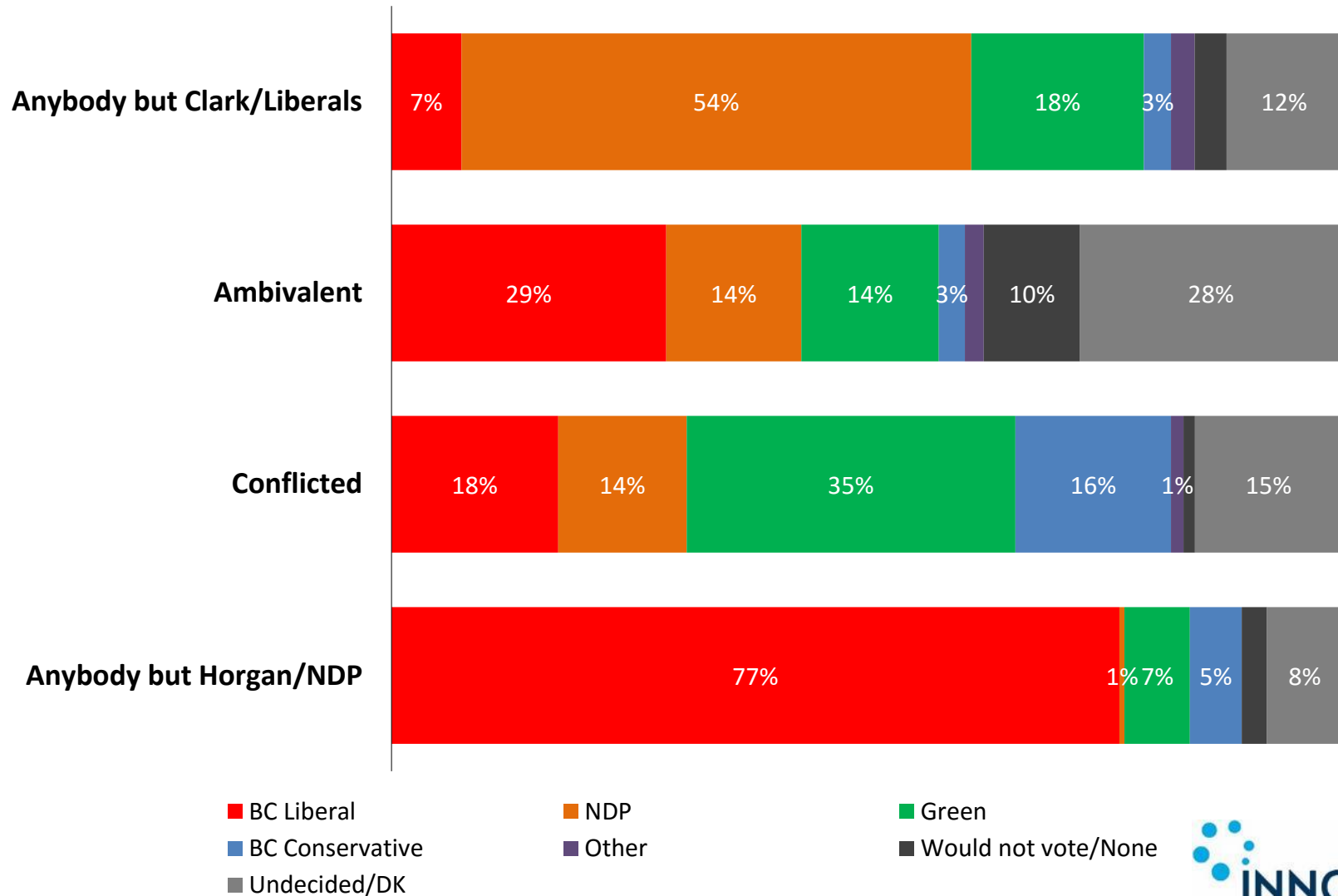
	Disagree	Neutral/DK	Agree
Disagree	Ambivalent		Anybody but Horgan/NDP voters
Neutral/DK			
Agree	Anybody but Clark/Liberal voters	Conflicted	

The most important thing in this election is to get rid of Christy Clark and the BC Liberals



More 'Anybody but Horgan' vote BC Liberal (77%) than 'Anybody but Clark' vote NDP (54%)

Combined Vote BY Anybody but ... segmentation



Debates:

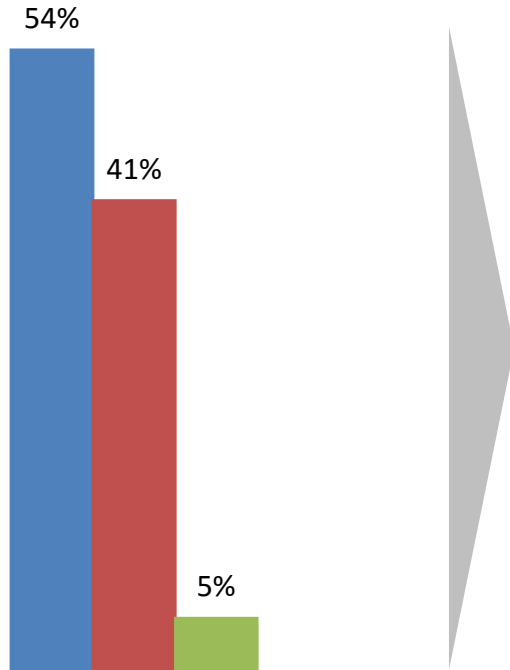
April 26th TV Debate

Results from May 1 online wave



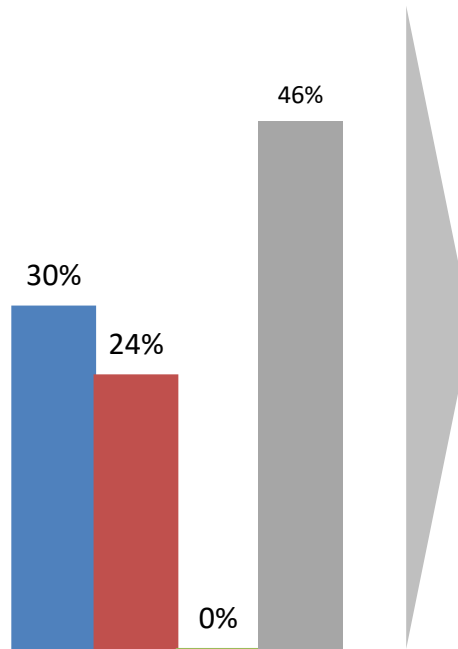
Leadership debate: a majority (54%) heard of the debate, ³⁵ of those who watched, 2-in-5 watched all of it

Q Have you read, seen or heard anything about the provincial party leader's TV debate that was held on Wednesday, April 26th?
[Asked of all respondents; n=500]

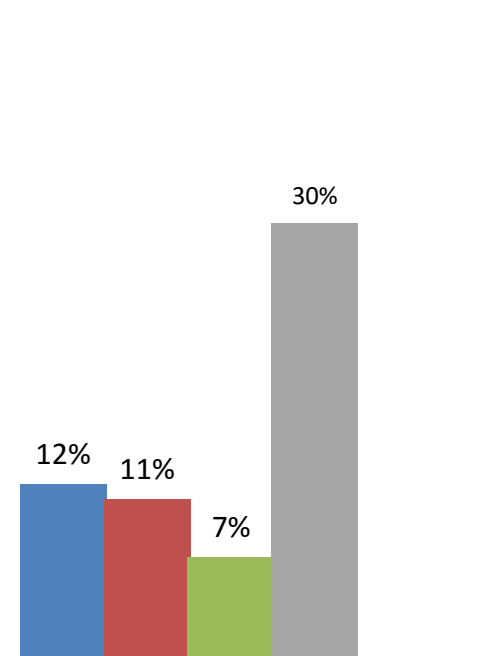


■ Yes ■ No ■ Don't know ■ Did not RSH

Q Did you happen to watch the leader's debate yourself?
[Asked of those who RSH; results shown for all respondents; n=500]



Q Did you watch all of the debate or just some of it?
[Asked of those who watched; results shown for all respondents; n=500]



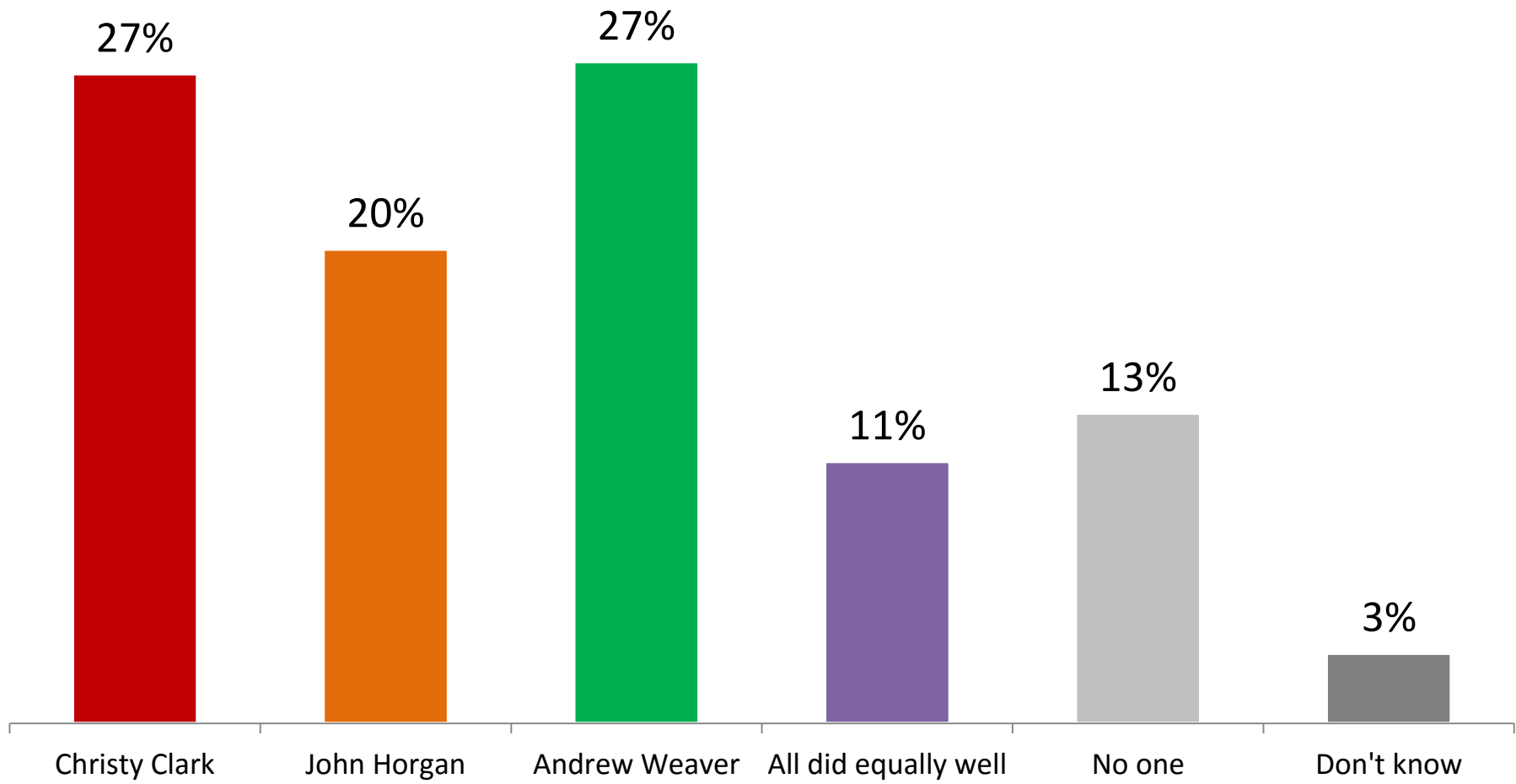
■ All ■ Most ■ Some ■ Did not watch

Who won the debate: Clark and Weaver tied at 27%; one-in-five say Horgan did best

Q

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

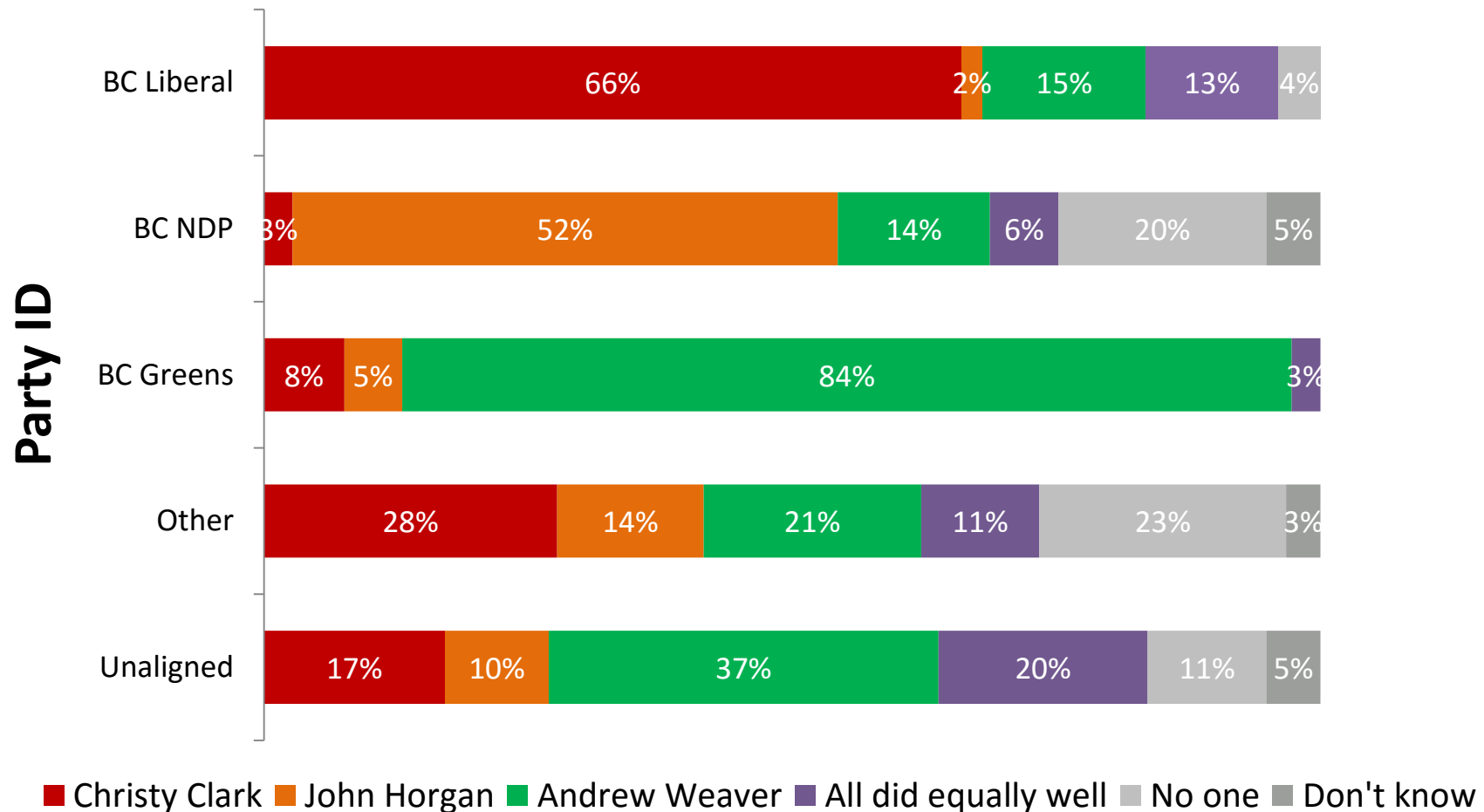
[asked of those who had watched at least some of the debate, n=150]



Greens happiest with their (84%); aside from their own candidate, Liberals and NDP think Weaver debated the best



In your opinion, which leader did the best in that debate? [by Party ID]
[asked of those who had watched at least some of the debate, n=150]

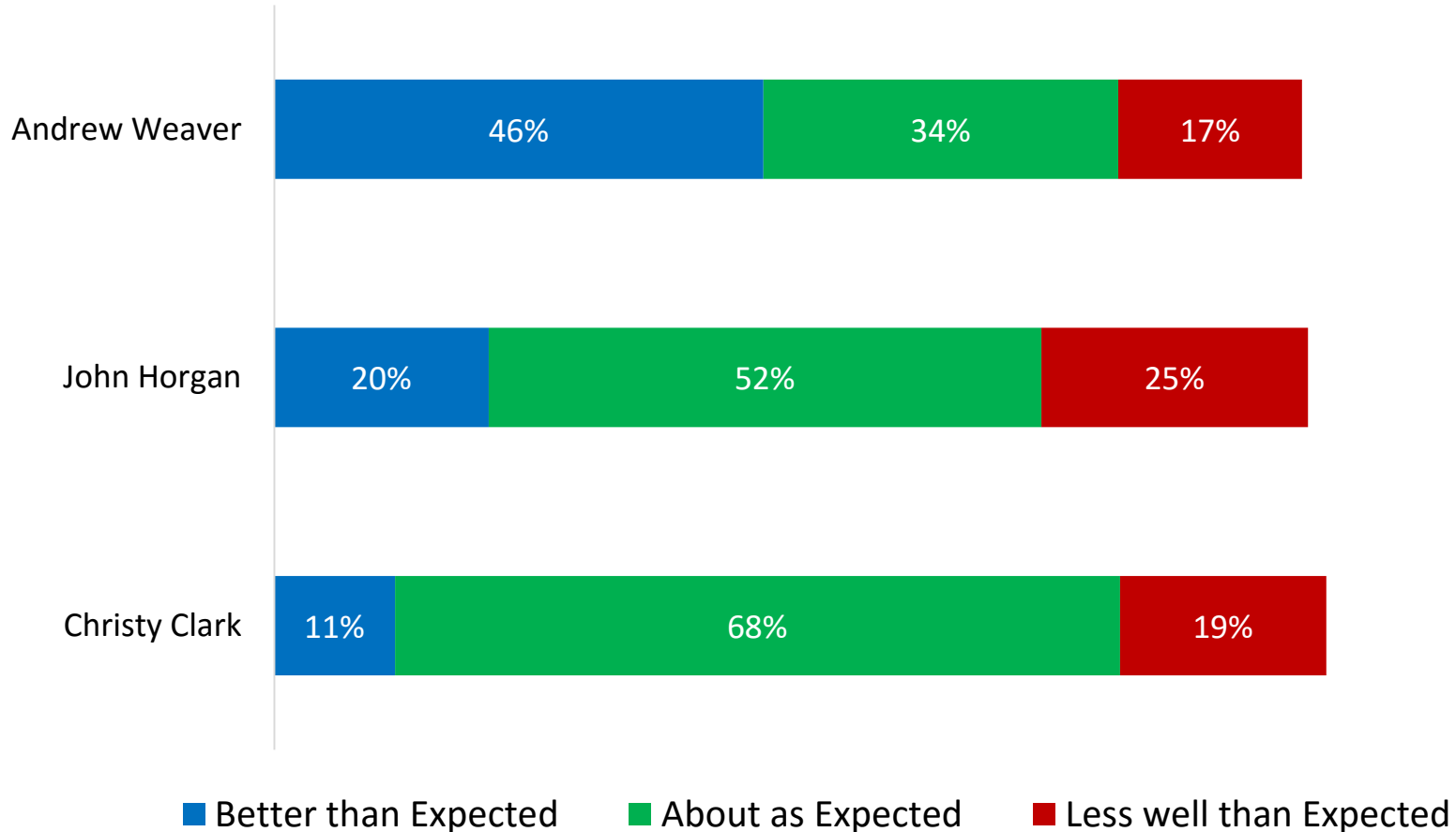


Debate Performance: a plurality (46%) believe Andrew Weaver performed better than expected

Q

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 those who had watched at least some of the debate, n=150]



Note: Don't know (1-3%) not shown

Debates:

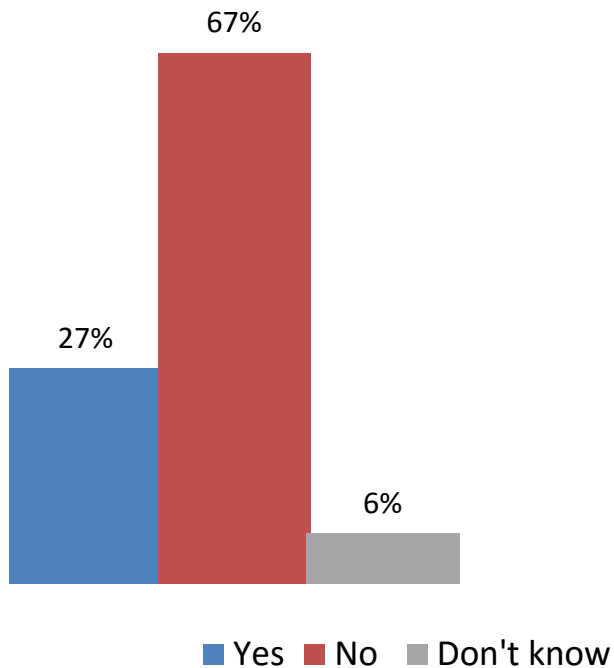
April 20th Leadership Radio Debate

Results from April 23 online wave

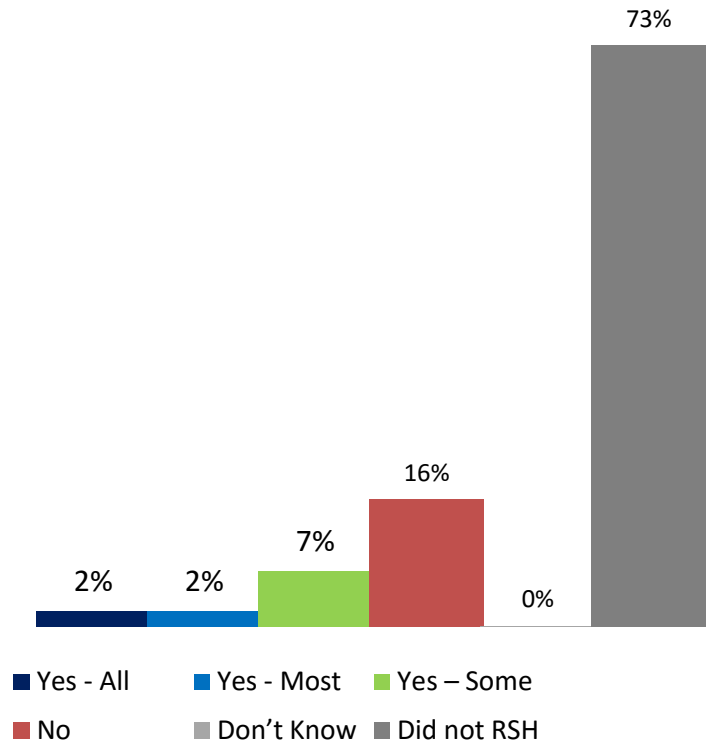


Leadership radio debate: a majority (67%) did not hear of the debate; of those who did, 58% did not listen to it ⁴⁰

Q Have you read, seen, or heard anything about the provincial leader's radio debate that was held this Thursday, April 20th from 8:30AM to 10:00 AM on NEWS 1130?
[asked of all respondents, n=1000]

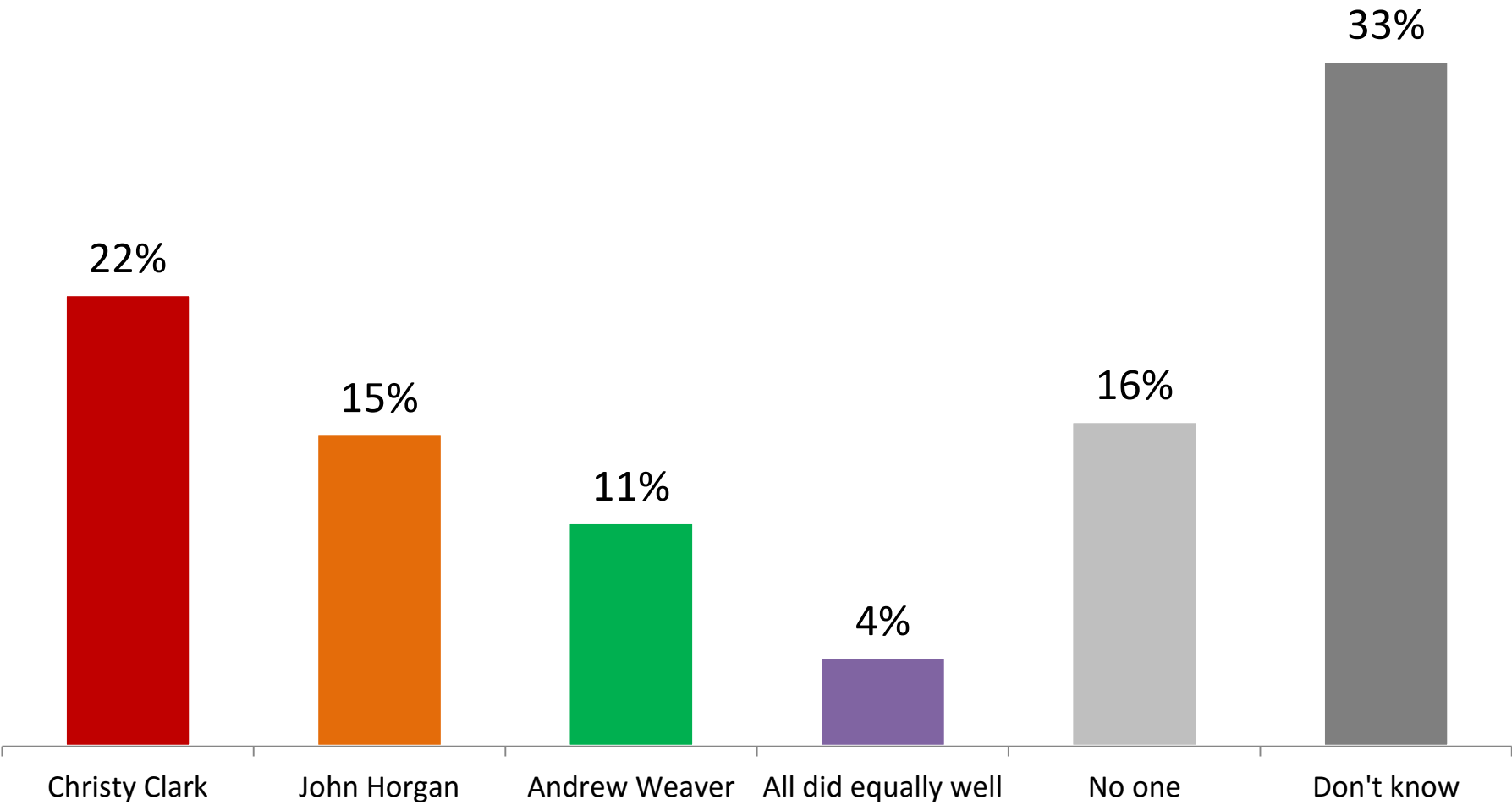


Q Did you happen to listen to any of the leader's debate yourself?
[asked of those who have RSH about radio debate; results shown for entire sample, n=1,000]



Who won the radio debate: Clark did the best at 22%, one-third don't know

Q In your opinion, which leader did the best in that debate?
[asked of those who had heard about the debate, n=270]





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