Horserace narrows while Liberals gain on underlying numbers

The biggest story this month is the Liberal Party and Justin Trudeau, who rebounded in favourability and gained on Tom Mulcair on delivering positive change. The party brand has also closed the gap with the NDP on protecting the middle class.

The Hill Times photo by Jake Wright

Justin Trudeau's favouribility numbers are up, even if it isn't translating to votes.

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After being pushed one way and pulled another, voters ended August very close to where they started at the beginning of the month with the horserace even tighter now than when the campaign began.

The Duffy trial motivated opposition supporters and dampened the Conservative opportunity to grow. The leaders' debate helped the Greens, Liberals and Tories to some

degree but didn't actually hurt the NDP. Most Canadians feel we are at least probably in a recession, but those who are most engaged in the issue feel the Conservatives are best able to manage that recession.
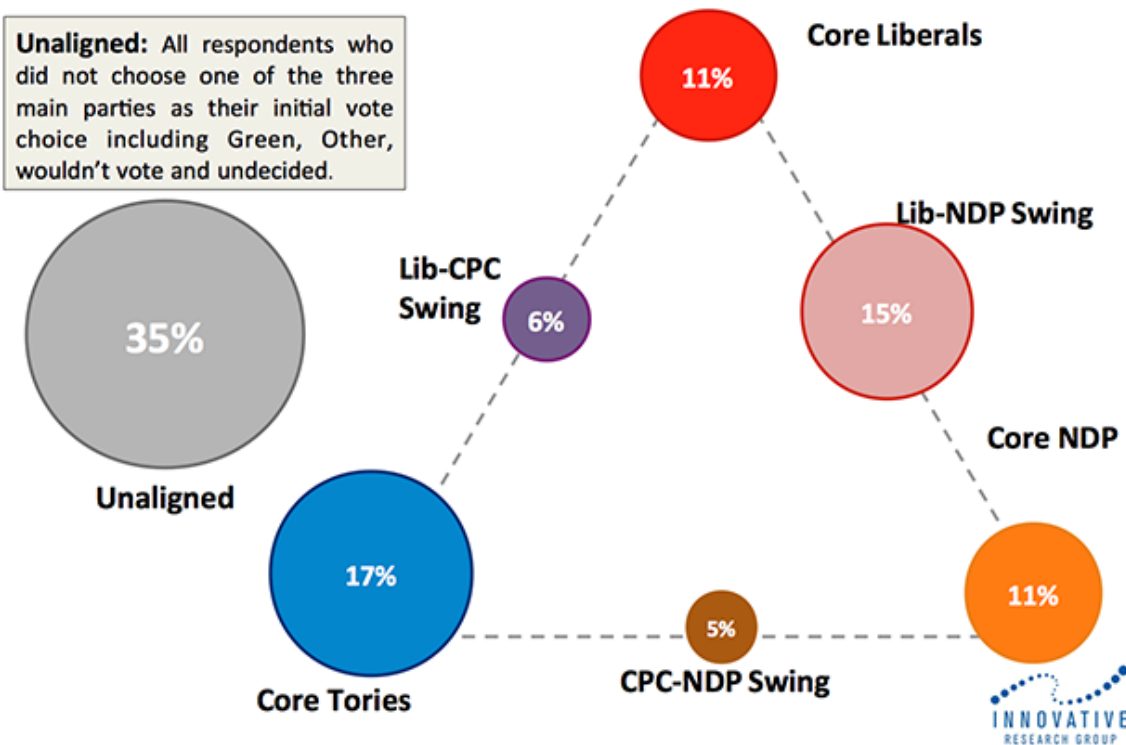
While the horserace numbers are similar but closer, there were several major shifts in underlying numbers that put the Liberals in a better position now than a month ago. However, the NDP retain the largest pool of potential supporters.

Overall horserace narrows

After four weeks of hard campaigning, very little has changed. Compared to the end of July, the Liberals and CPCs are up one point each while the NDP is down two points, according to a 3,274-person Innovative Research Group online survey conducted from Aug. 24-26. Because the survey included large oversamples in the Atlantic, Quebec and B.C., the results have been weighted down to a final sample size of 2,000.

When we look at first choice, lean and second choice ("lean" refers to where undecided voters say they are leaning), we find the NDP is doing the best with 39 per cent of the

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.

Core Liberals — 11%

Lib-NDP Swing — 15%

Lib-CPC Swing — 6%

Core NDP — 11%

Unaligned — 35%

Core Tories — 17%

CPC-NDP Swing — 5%

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respondents actively considering voting NDP. The Liberals are four points back at 35 per cent while the Conservatives have the smallest active voting pool at 30 per cent. While the Conservatives do not look well positioned to win across the country as a whole, they do better when we look at specific regions. At the simplest level—Quebec versus the Rest of Canada—we can already see why the Conservatives remain competitive with such a low overall pool. In the Rest of Canada, the core Conservative base (17 per cent) is much larger than either the Liberals or NDP, both of which have core support pools of 11 per cent. However, if the large group (15 per cent) of NDP-Liberal swing voters moves decisively one way or another, the Conservatives would quickly get in trouble.

One thing the Conservatives should be concerned about is voter expectations of who is best able to beat the Conservatives. Across the country as a whole, it looks good for Conservatives as respondents are divided with 37 per cent saying the NDP and 35 per cent saying the Liberals. However, with the exception of Manitoba and Saskatchewan, region by region we see regional dominance with the NDP seen as best able to beat the CPC in B.C., Alberta and Quebec while the Liberals are seen to have the best chance in Ontario and Atlantic Canada.
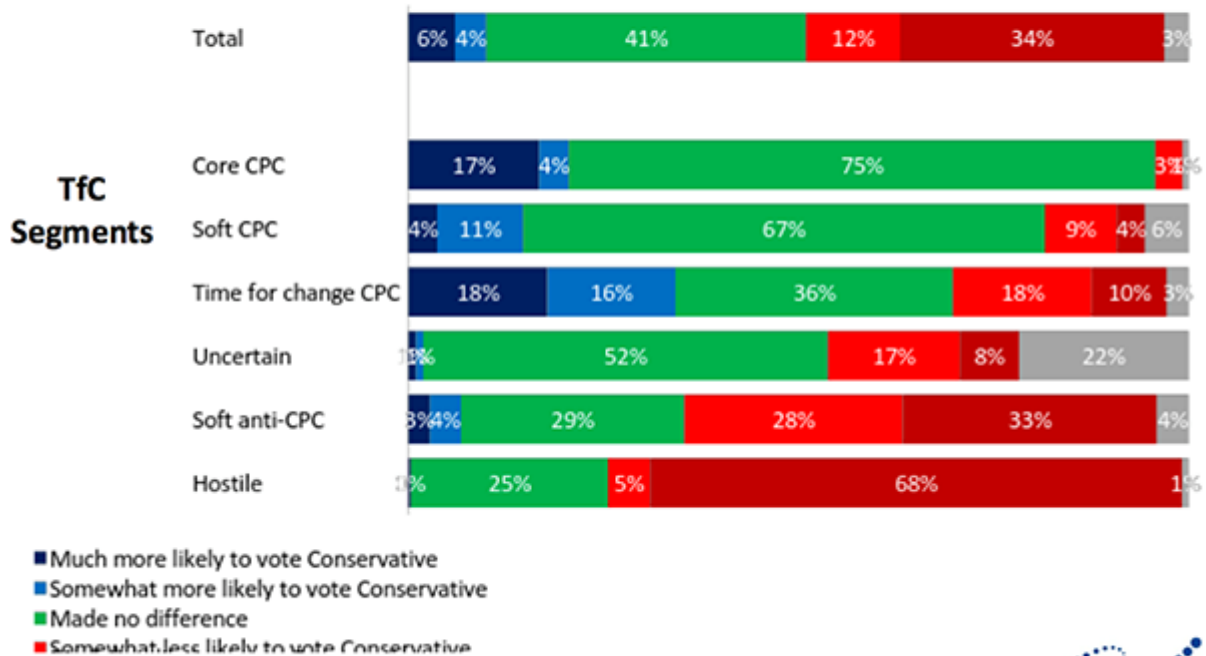
Duffy suppresses CPC support among 'Time for A Change' Tories

How can the vote be so stable after several weeks of embarrassing testimony at the Duffy trial?

Most respondents are not glued to their TVs, radios and newspapers following the story. Just 15 per cent are following the story very closely, although another 35 per cent say they are following it somewhat closely.

Duffy impact on Time for a Change Segments: Core CPC undamaged but quarter of TfC Tories less likely to vote CPC

Q 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 Thomas Mulcair and the federal NDP, or did it make no difference?

TfC Segments						
Total	6%	4%	41%	12%	34%	3%
Core CPC	17%	4%	75%		3% 1%	
Soft CPC	4%	11%	67%	9%	4%	6%
Time for change CPC	18%	16%	36%	18%	10%	3%
Uncertain	1%		52%	17%	8%	22%
Soft anti-CPC	3% 4%	29%	28%		33%	4%
Hostile	1%	25%	5%	68%		1%

- ■ Much more likely to vote Conservative
- ■ Somewhat more likely to vote Conservative
- ■ Made no difference
- ■ Somewhat less likely to vote Conservative

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Overall, 46 per cent say they are less likely to vote CPC after following the Duffy trial, but many of those people were hostile to the Tories to begin with. This is good for opposition parties when it comes to mobilizing their bases, but it is of limited benefit when it comes to expanding their support.

A large majority of core and soft Conservative supporters say the trial is making no difference to them. While most Time for a Change Conservatives—the key target for the Conservative war room—are either unchanged (36 per cent) or even more likely to vote CPC (34 per cent), more than one-quarter (28 per cent) are less likely to vote CPC. So while the trial is damaging the Conservative prospects to improve their standing, it is not damaging their base.
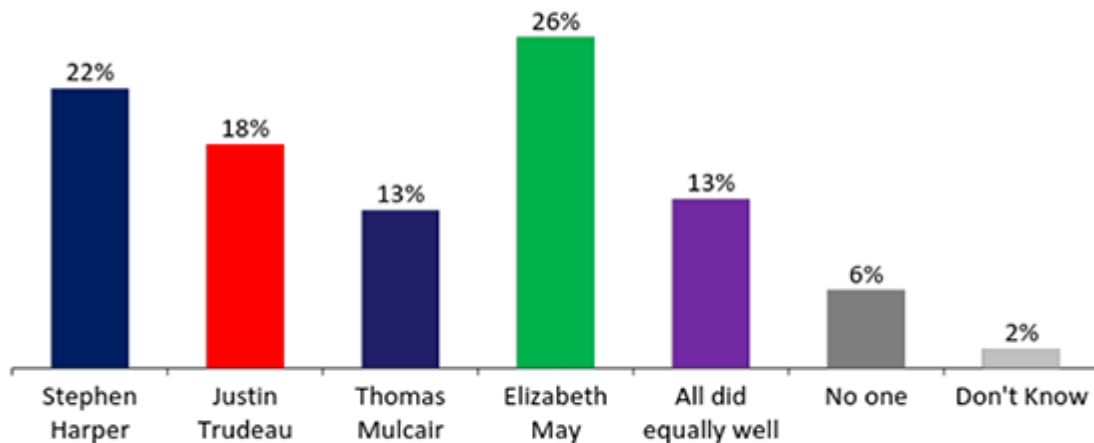
Debate benefits other leaders more than Mulcair

While most campaigns can claim they won the debate in some manner, the NDP have to be content with saying they didn't lose.

Debate winner: Plurality pick May, but Harper did better than his main rivals

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

Stephen Harper	Justin Trudeau	Thomas Mulcair	Elizabeth May	All did equally well	No one	Don't Know
22%	18%	13%	26%	13%	6%	2%

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Elizabeth May and the Greens were the big winners in the debate. May was seen as the winner by 26 per cent of our respondents who heard something about it. She was seen as the absolute winner by Green and unaligned voters and was a strong second among NDP and Liberal voters.

May also won the expectation game. More than half (53 per cent) of our respondents felt May did better than expected.

Stephen Harper came second as the overall winner of the debate. A majority (55 per cent) of Conservative viewers felt he was the clear winner and he also won with 37 per cent among Time for a Change Tories. He did not score well with any other partisan group, including the unaligned, as most people (67 per cent) felt he met expectations. While Justin Trudeau was only third on the question of who won the debate, Trudeau did well in the expectation game. Three times as many respondents say Trudeau did better (44 per cent) than expected than felt he did worse (15 per cent) than expected. Trudeau did particularly well not only with his base but with his second choice voters (55 per cent better) and undecided voters (50 per cent).

Thomas Mulcair didn't win in either the beauty contest or the expectation game, but he didn't lose either. First, most people (61 per cent) heard nothing about the debate. Second, while only 13 per cent said he won the debate, his base was more likely to choose him (42 per cent) than May (34 per cent) and few NDPers chose another major party leader as the winner. Third, more than half (56 per cent) said he met expectations and almost as many said he did better (20 per cent) than expected than said he did worse (22 per cent).

Recession benefits Conservatives

While many pundits feel a recession will hurt Conservative chances, our survey shows it helps the government's chances for re-election and may have helped to offset any negative impact of the Duffy trial.

Party best by Attention : Those following recession issue closely most likely to think CPC best to handle it

Q Please tell me which party you think would do a much better job or a somewhat better job of dealing with a recession, or if you think none of the parties would do a good job on that issue. [ALL CANADA, BQ ONLY IN QUEBEC] BY How closely have you been following the discussion in the media and elsewhere about whether or not Canada's economy is in a recession?

	Very closely	Somewhat closely	Not very/not at all closely
CPC Better	37%	29%	22%
LPC Better	24%	28%	22%
NDP Better	26%	25%	25%
BQ Better (QC Only)	5%	6%	10%
None	10%	16%	25%

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As with most topics in this survey, even with this week's stock market gyrations, only 21 per cent are very closely following the media's coverage of whether Canada is in a recession or not. While only 24 per cent say Canada is definitely in a recession, 49 per cent say the country is probably in a recession.

Across Canadians as a whole, the Conservative have a slight edge (29 per cent) as the party seen as best to deal with a recession with the Liberals and NDP tied at 25 per cent. However, as we saw in our benchmark survey, people who are more engaged in an issue are often different from the average. When we look at the people following the issue closely, the Conservatives are seen as best by 37 per cent with the NDP 11 points behind and the Liberals 13 points back.

Conservatives have been focus of public debate, NDP keep a low profile

Not surprisingly, voters have heard more about the Conservative campaign (60 per cent) than the Liberals (52 per cent) or the NDP (41 per cent).

The winds of public debate have been blowing hard against the Conservatives with 48 per cent less favourable and just 16 per cent more favourable due to the dominance of the Duffy trial in what people recall. However, much of this is due to people seeing what they want to see. Hostile and soft anti-CPC voters have seen negative news. Time for a Change Tories actually report seeing more good news than bad while core Tories say the news made no difference.

The Liberals have a fair wind with 39 per cent more favourable and 23 per cent less favourable. The less favourable comes mostly from Conservative voters and to a lesser degree Bloc voters. People liked the Liberal events and announcements, with the veterans' issue, protecting the middle class with higher taxes on the rich, and the economic team announcement all securing high recall and net positive reactions. The new Liberal response ad also generates strong positive response.

The NDP also enjoy a positive impact among those who have heard from them with 37 per cent more favourable and 27 per cent less favourable. Day care is the NDP's number one mention but it generates divided responses. The NDP economic plan, their plan to improve pension support for seniors and general mentions of helping the middle class all drive more favourable views.

In Quebec, the Bloc was even more low-profile (only 29 per cent have read, seen or heard anything) but again the impact among those aware was more positive (35 per cent) than negative (25 per cent). Consistent with their brand, defending sovereignty and Quebec's interest was both the most common and most favourable mention.

Underlying numbers move towards Trudeau

While the vote changes were small, the Liberals secured some key gains in underlying numbers after the first month of campaigning.

Justin Trudeau's favourability ratings are up from net +1 to a net +14. This comes from both an increase in those who see him favourably (44 per cent from 37 per cent) and a decrease in those who see him unfavourably (29 per cent from 35 per cent).

Trudeau has also closed what was previously a seven-point gap with Mulcair on who represents positive change (24 per cent a piece, from 27 per cent Mulcair and 20 per cent Trudeau in the last wave).

The changes are not just related to leader brand but the party brand as well. The Liberals have closed the gap with the NDP on which party is best at protecting the middle class. Twenty-eight per cent now choose the Liberals (up five points) while 27 per cent say NDP (down five points). While we don't have definite proof this was because of the Liberal Party's new "Ready" ad, we note that our ad testing also showed a significant gain on protecting the middle class after participants saw that ad for the first time.

Pulling it all together

The Conservatives are running a Timex campaign—they have taken a licking but they keep on ticking. The public debate is strongly tilted against them but the impact is much less negative among their target voters and their base than the average suggests. The Conservatives continue to be challenged by the smallest pool of accessible voters and depend on opposition vote splits to pull off a victory. With the Duffy trial behind them, they now have the opportunity to work on expanding their pool and winning back Time for a Change Tories.

With low awareness numbers, the NDP look like a campaign that is holding onto its resources until Canadians become more engaged. They are creating a net positive impact with most of their announcements, but there is no sign of any significant ad buy. They didn't win much ground but didn't lose much either and retain the largest pool of votes and the bulk of their ad budget.

The biggest story this month is the Liberal Party and its leader Justin Trudeau. The Liberals made only marginal gains in vote but reached more people than their opposition rivals and had good effect. Trudeau, who had been damaged in the pre-writ, has rebounded in favourability and has gained on Mulcair on delivering positive

change. The party brand has also closed the gap with the NDP on protecting the middle class—exactly what our ad test showed their new ad would do.

While the topline results look similar to the start of August, the underlying numbers show a race that is even more competitive than we saw when the writ was dropped.