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Public Opinion Research ▶▶

Federal Budget and Politics Spring 2016



Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from March 22nd to March 30th, 2016.
- This online survey of 2,456 Canadian adults was conducted on INNOVATIVE's Canada 20/20 national panel.
- 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 n=2,000 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.
- 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: *Graphs and tables may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.*

Segmentation: Where did respondents come from?

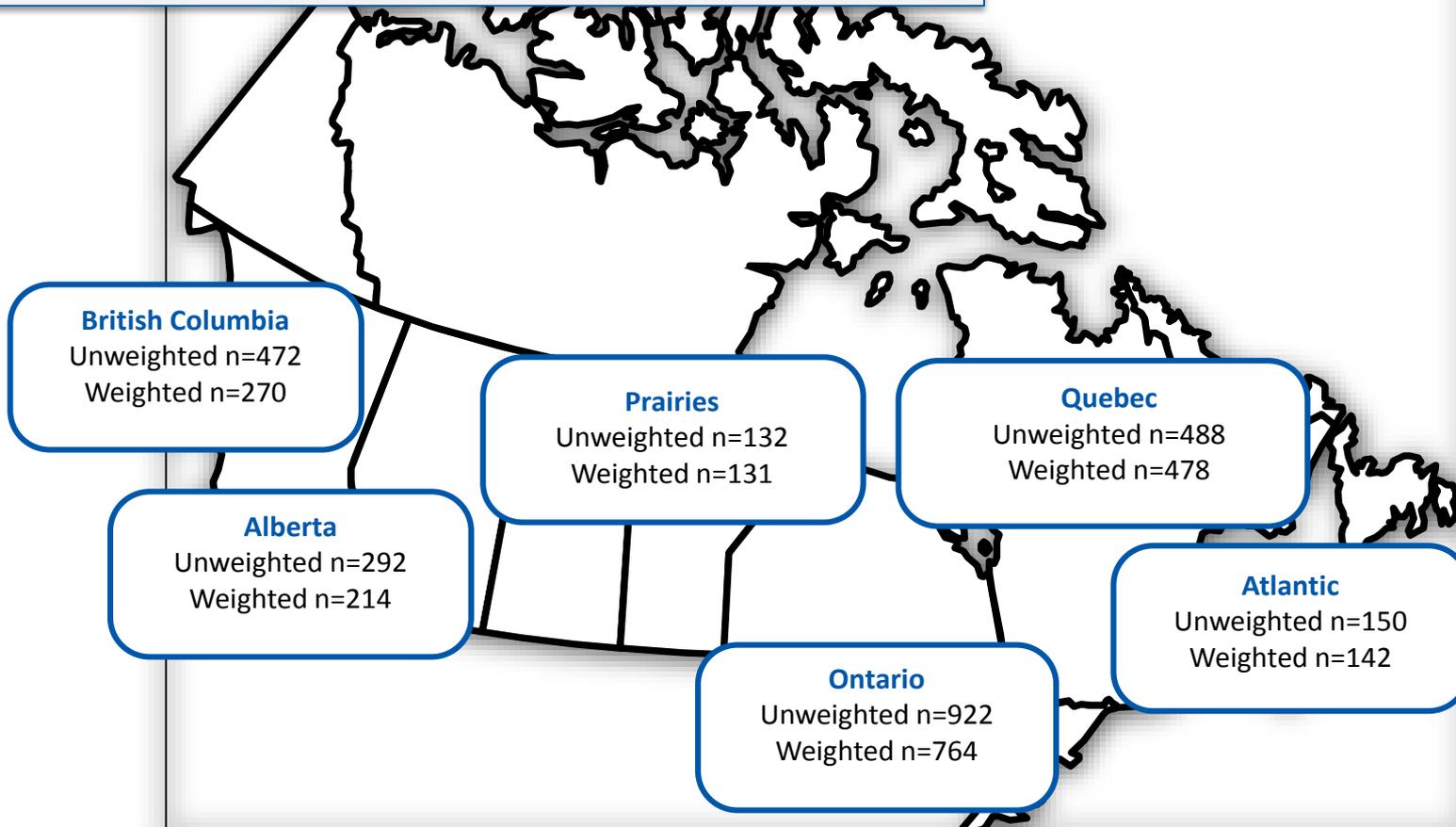
Regional groupings include:

- 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=2,456

Weighted n=2,000



Key Findings – Vote and Leadership

- In **combined federal vote**, the Liberals (42%) have maintained a strong lead over the Conservatives (28%) since the Federal Election in October of 2015. The NDP lag at just over one-in-ten (11%). Strong majorities of those who voted Liberal or Conservative in the last election report they would vote for those parties again (87% LPC, 88% CPC), but more than one-in-four (27%) NDP voters say they would vote Liberal.
- At the **regional level**, the Liberals lead in all regions except in Alberta, ranging from a low of 27% in Alberta to a high of 57% in Atlantic Canada. The Conservatives (54%) are the strong favourite in Alberta. The gap between the Liberals (35%) and the Conservatives (32%) is narrowest in BC.
- On **decided vote**, the Liberals (46%) remain in the lead with the Conservatives (30%) more than 15 points behind. Thus the gap has increased since the election result which had the Liberals at 39% and the Conservatives at 32%. The NDP has lost ground since the election, dropping from 20% to 12% of the decided vote.
- Looking at **second choice**, there is a close link between NDP and Liberal voters: 45% of Liberal voters choose NDP as their second choice, and 43% of NDP voters pick the Liberals as their second choice party.
- **Leader impression** of Justin Trudeau overall is highly positive (31% net favourable impression) as Thomas Mulcair drops slightly (3%). Impression of the Conservative leader improves 26 points since Rona Ambrose stepped in to replace Stephen Harper.
- Among those who were able to pick an individual, a strong majority (60%) say Justin Trudeau would make the **best Prime Minister**. This is an increase of 12 points since our survey immediately following the October election. Only 2-in-10 say Ambrose (21%) and 1-in-10 say Thomas Mulcair (12%) would make the best PM.

Key Findings – Vote and Leadership by Value Clusters and Party ID

- On **combined federal vote**, amongst value clusters, Core Left (62% vs. 22%), Left Liberals (56% vs. 16%) and Business Liberals (52% vs. 9%) are more likely to vote Liberal than NDP. Deferential Conservatives (48% vs 38%) and Populist Conservatives (70% vs. 16%) are more likely to vote Conservative than Liberal. Amongst party-identifiers, while over 90% of Liberal-identifiers are more likely to vote Liberal, only 69% of NDP-identifiers would vote NDP and 26% would vote Liberal.
- On **decided vote**, the difference between support for the Liberals and the NDP has widened among certain value clusters since the post-election study. Support for Liberals among Core Left is up 13 points, while support for the NDP is down 11 points. Support for the Liberals among Left Liberals is up 8 points, while support for the NDP is down 9 points. For Thrifty Moderates, support for Liberals is up 11 points and down 8 points for the NDP.
- On **leader favourability, Justin Trudeau** shows increasingly strong positive favourables among the Core Left (from +65 to +77) and Left Liberals (from +62 to +69) since the post-election survey, but reads increasingly negative among Populist Conservatives (from -24 to -41). Positive favourability of the Conservative party leader, **Rona Ambrose** increases slightly among Populist Conservatives (from +34 to +39). Core Left (from -85 to -49) and Populist Liberals (from -52 to -13) feel much less negative about Rona Ambrose than they did about Stephen Harper. Response to **Thomas Mulcair** is less positive among Left Liberals (from +38 to +24), Populist Liberals (from +27 to +13) and Populist Left (from +35 to +9).
- On **best Prime Minister**, Trudeau widens the gap with Mulcair among left-leaning groups. More Core Left (up 13 points) and Left Liberals (up 18 points) think Trudeau would make the best PM since the post-election study, while fewer Core Left (down 8 points) and Left Liberals (down 13 points) feel the same about Mulcair.

Key Findings – Federal Budget

- Over 7-in-10 (71%) say they are **aware of the recent federal budget**, and respondents are slightly more likely to be satisfied (42%) than dissatisfied (37%) with it.
- Overall, **the federal budget left respondents less favourable towards the federal government** (net -7% favourable). However, it is a less negative reaction than previous tracked years (-16% in 2015; -41% in 2012; -20% in 2011; -28% in 2010; -11% in 2008).
- 4-in-10 (41%) think **the budget will directly impact them** and are more likely to anticipate a negative (49%) than a positive (41%) impact. However, a plurality (40%) think it will have a **positive impact on the economy**.
- Nearly 4-in-10 (38%) are often **anxious** and over a third (34%) are **angry** when they think about the new federal budget. The level of anxiety is marginally higher than for the last Conservative budget, while the level of anger is significantly lower.
- A plurality think the budget will result in them paying **more taxes** (42% higher taxes vs. 14% lower taxes), but will result in **lower unemployment** (32% lower vs. 18% higher). More respondents than not say it will lead to **higher economic growth** (35% higher vs. 19% lower) and **more user fees for government services** (35% to 6%). A plurality think it makes no difference to the **health care system** (42%).
- With regard to specific budget announcements, response is most favourable for **infrastructural spending** (+53% net favourability toward the Federal Liberal Government) and **disability awards to injured veterans** (+52%). Response is least favourable toward the government for **phasing out income splitting for couples with children** (-1%) and **deferring a promised tax cut for small businesses** (-1%).
- Respondents are split on whether the increased deficit is an example of **leaders making promises** that they have no intention of keeping (43%) or a **reflection of economic events** that are beyond the party's control (45%).

Key Findings – Federal Budget by Value Clusters and Party ID

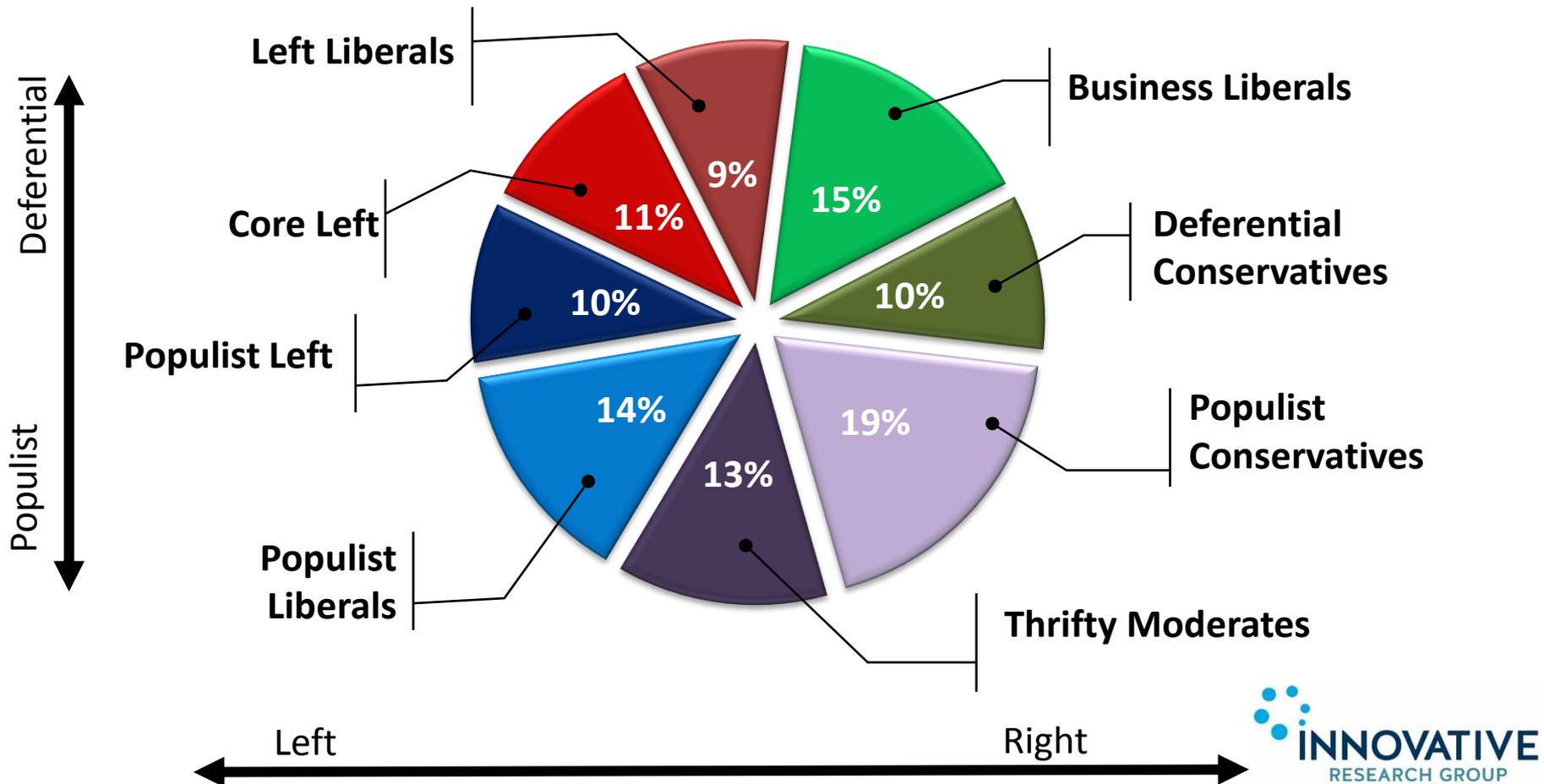
- Populist (86%) and Deferential (81%) Conservatives are most likely to say they've **RSH about the federal budget** compared to 48% of Thrifty Moderates. CPC-identifiers are also more likely to have RSH about the budget than LPC-identifiers (82% vs 72%).
- On **satisfaction**, Core Left (80%), Left Liberals (64%) and Liberal-identifiers (72%) are the most satisfied while just 1-in-8 Populist Conservatives (12%) and Conservative-identifiers (12%) are satisfied with the federal budget.
- A plurality of Core Left (44%) and Left Liberals (43%) say the budget leaves them **feeling more favourable** toward the federal government, as compared to Populist Conservatives (7%) and Deferential Conservatives (16%). Liberal-identifiers (46%) and NDP-identifiers (40%) show a more favourable attitude toward the government than their Conservative counterparts (7%) and unaligned respondents (14%).
- Populist Conservatives (56%) and Deferential Conservatives (51%) are most likely to think the budget will directly **impact their personal situation**. Conservative-identifiers (57%) are more likely to say so than NDP-identifiers (30%) and unaligned respondents (30%). Conservative-identifiers (16%), Populist Conservatives (15%) and Deferential Conservatives (27%) are less likely to perceive this impact as positive, compared to Core Left (73%) and Liberal-identifiers (70%).
- More Core Left (68%), Left Liberals (56%) and Business Liberals (53%) perceive the **impact of the budget on the economy** as positive compared to Populist Conservatives (14%). Liberal-identifiers (63%) and NDP-identifiers (51%) are more likely to say so than their Conservative counterparts (15%).
- Populist Conservatives feel **anxious** (65%) and **angry** (68%) about the budget more often than Core Left (15% anxious and 11% angry). Conservative-identifiers are most anxious (68%) and angry (69%) about the budget.
- Populist Conservatives are most likely to think the budget will result in **more taxes** (70%), **more user fees** (59%), and **worse health care system** (36%). They are also more likely to think the increased deficit is an example of leaders making promises that they had not intended to keep. On the other hand, Core Left respondents are most likely to believe the budget will lead to **lower unemployment** (60%), and **higher economic growth rate** (66%).

Value Clusters and Federal Party ID

Cluster Analysis: Values Clusters

We have used cluster analysis to group respondents who share common sets of values to better understand the motivations and needs of our audience.

The following chart illustrates eight unique groups among respondents of this survey based on their fiscal and economic values and how hard they are struggling to get by in their day-to-day lives. The pie is organized from left to right on the political spectrum, with “deferential” Canadians on the top half and “populist” ones on the bottom.



What defines each cluster?

		Core Left	Left Liberals	Business Liberals	Deferential Conservatives	Populist Conservatives	Thrifty Moderates	Populist Liberals	Populist Left
...to make ends meet	Difficult	35%	52%	40%	29%	69%	62%	66%	42%
	Not difficult	64%	48%	59%	70%	58%	31%	37%	30%
People who don't get ahead in life should blame...	Themselves	20%	28%	61%	70%	71%	21%	50%	23%
	The system	33%	23%	11%	6%	10%	31%	22%	40%
Government spending should be based on...	Ability to afford	2%	16%	0%	94%	98%	59%	16%	
	Public need	95%	75%	94%	0%	0%	0%	74%	98%
Provincial government's role in economy	Active partner to help businesses	84%	69%	46%	25%	11%	31%	45%	53%
	Staying out of the way	8%	17%	41%	63%	86%	33%	40%	33%
Main role of government to...	Create equal opportunity	0%	84%	77%	93%	97%	10%	93%	0%
	Redistribute wealth	99%	0%	14%	3%	1%	52%	0%	96%
When it comes to government decision making...	Common sense	0%	0%	43%	0%	97%	42%	92%	86%
	Listen to experts	88%	85%	37%	86%	0%	19%	0%	0%
The profit system...	Brings out worst in human nature	70%	64%	0%	5%	8%	34%	86%	72%
	Teaches hard work and success	15%	10%	86%	86%	85%	19%		13%
Environment or economy	Environment	85%	78%	36%	24%	14%	31%	59%	59%
	Economy	8%	11%	47%	63%	78%	32%	27%	30%

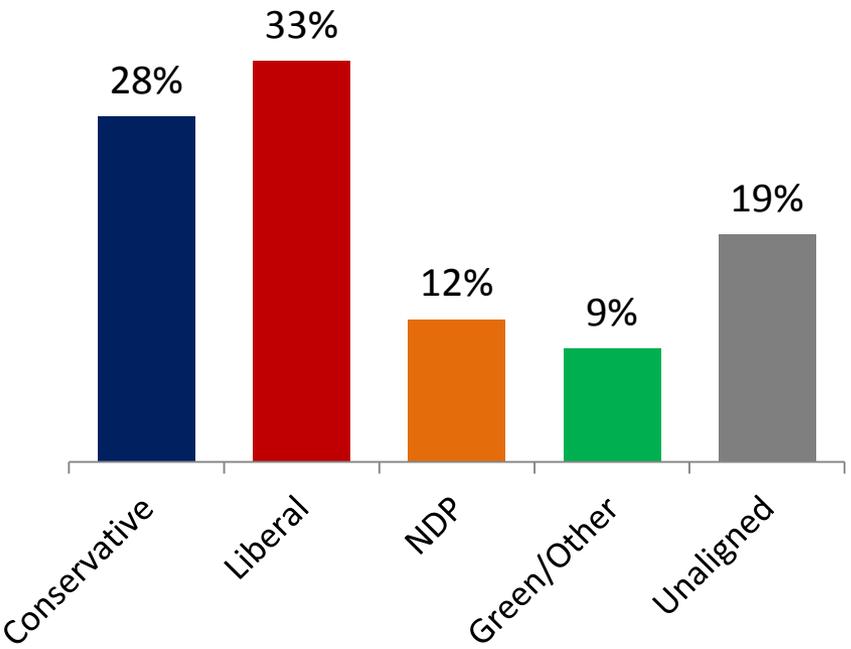
Note: "Don't know" is not shown here.

Federal Party ID: one-third in ROC (33%) and close to 3-in-10¹¹ (29%) in Quebec consider themselves Liberal

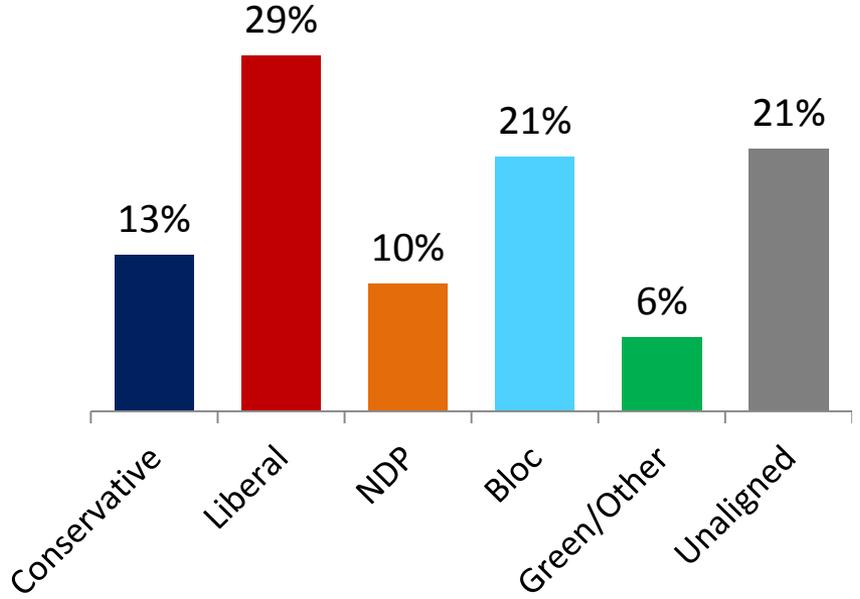


Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents]

Rest of Canada



Quebec



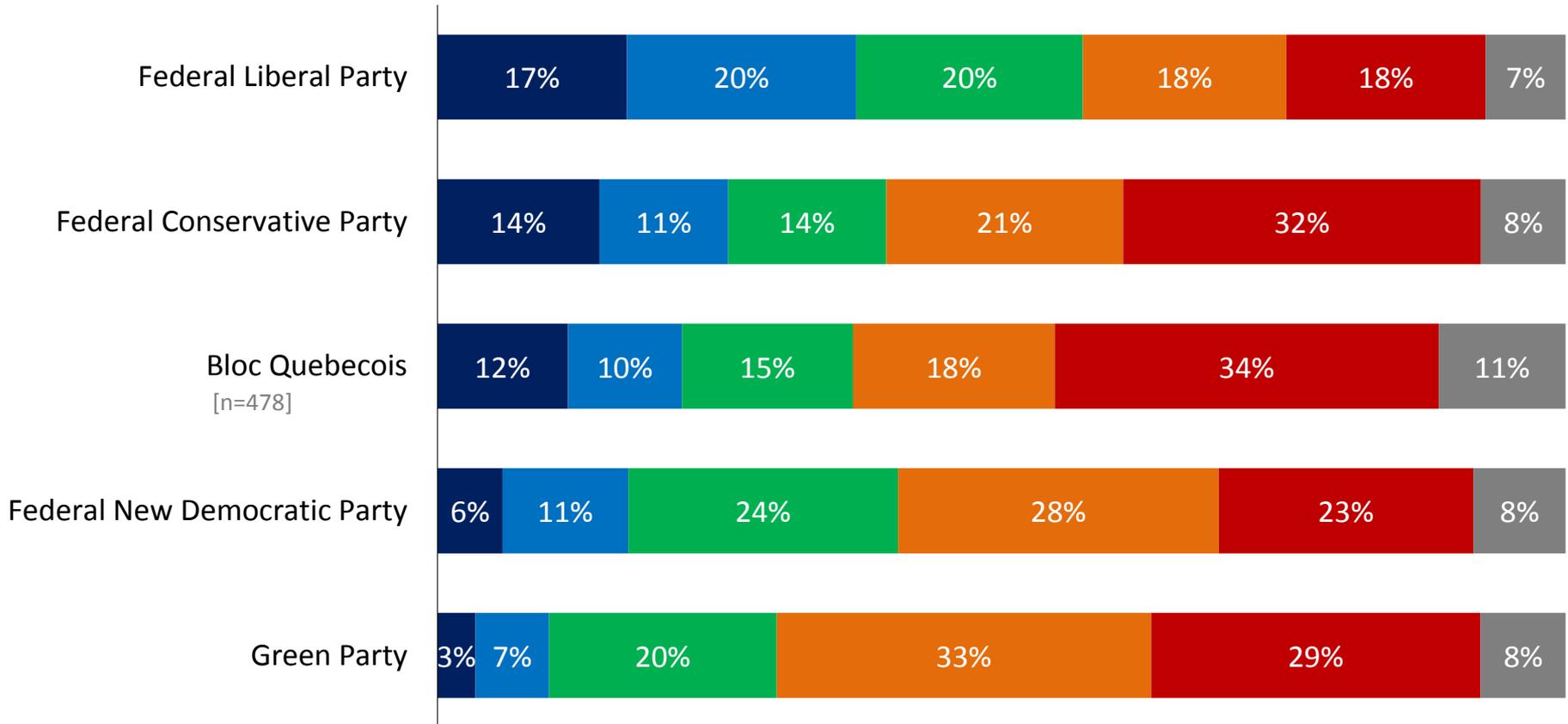
n=478

Note: n=488 unweighted.

Federal Vote

Likelihood to vote by Party: over one third would generally vote Liberal and one quarter would vote Conservative

Q In general, how likely are you to vote for each of the following federal political parties?
[asked of all respondents]



■ Definitely vote for this party ■ Very likely ■ Somewhat likely ■ Not very likely ■ Would never vote for this party ■ Don't know

Likelihood to vote for each party by Region

Percentage of likelihood	Region					
	BC	AB	Prairies	ON	QC	Atlantic Canada
Liberal	60%	36%	63%	64%	48%	73%
Conservative	39%	68%	48%	40%	27%	34%
NDP	41%	28%	43%	45%	40%	43%
Bloc Quebecois					37%	
Green Party	37%	22%	38%	33%	22%	33%

Likelihood to vote:
Definitely vote for this party + Very likely + Somewhat likely

Likelihood to vote for each party by Value Cluster

Value Clusters

Percentage of likelihood	Core Left	Left Liberals	Business Liberals	Deferential Conservatives	Populist Conservatives	Thrifty Moderates	Populist Liberals	Populist Left
Liberal	78%	82%	69%	53%	27%	53%	59%	58%
Conservative	9%	17%	37%	63%	82%	35%	30%	16%
NDP	71%	55%	38%	25%	18%	46%	41%	52%
Bloc Quebecois	36%	32%	40%	26%	31%	32%	46%	46%
Green Party	49%	52%	26%	16%	13%	32%	32%	37%

Likelihood to vote: Definitely vote for this party + Very likely + Somewhat likely

Likelihood to vote for each party by Party ID

Party ID

Percentage of likelihood	Liberal	Conservative	NDP	Bloc Quebecois	Green/Other	Unaligned
Liberal	94%	26%	62%	26%	48%	45%
Conservative	20%	94%	9%	14%	35%	31%
NDP	46%	15%	96%	30%	41%	36%
Bloc Quebecois	16%	22%	22%	96%	34%	25%
Green Party	33%	13%	47%	20%	65%	25%

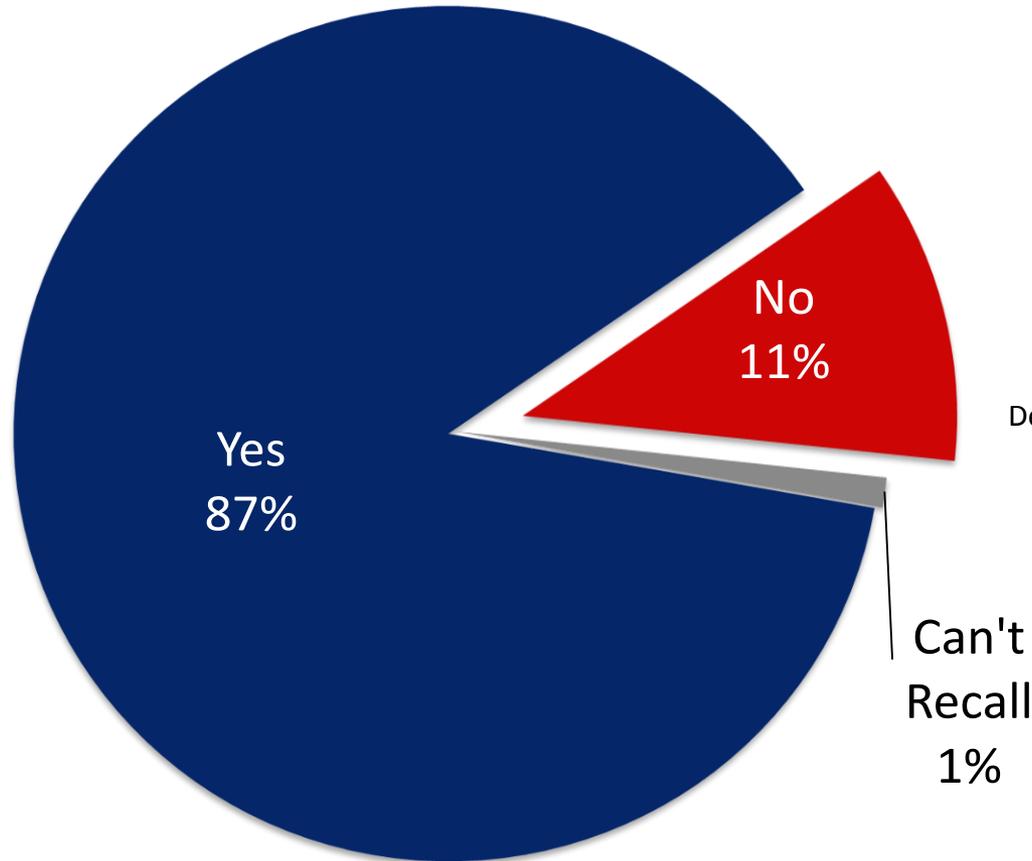
Likelihood to vote: Definitely vote for this party + Very likely + Somewhat likely

Nearly 9-in-10 say they voted in 2015 federal election



In talking to people about politics and elections, we often find that they do not get a chance to vote. Did you happen to vote in the October 19th 2015 federal election?

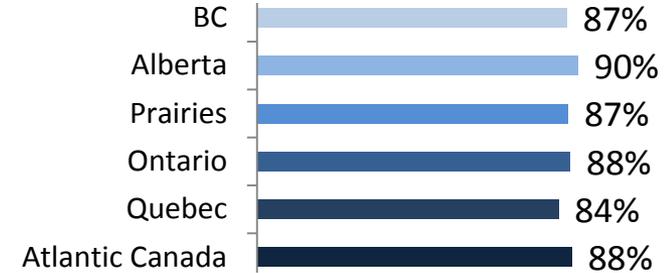
[asked of all respondents]



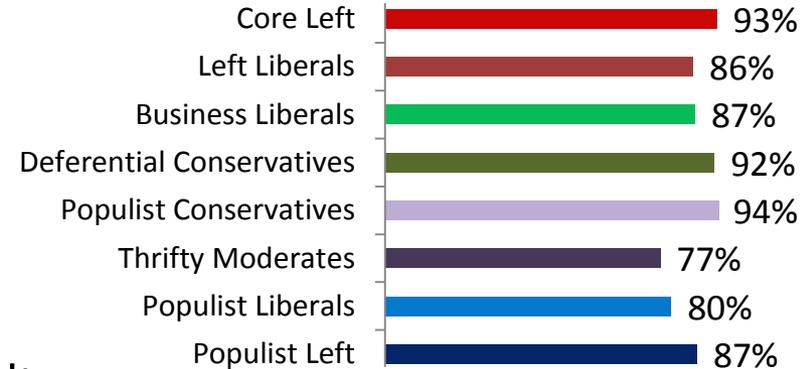
Sample Breakdown ▶▶

Those who say "yes"

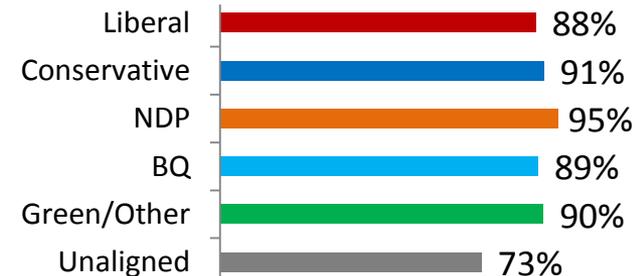
Region



Value Cluster



Party ID



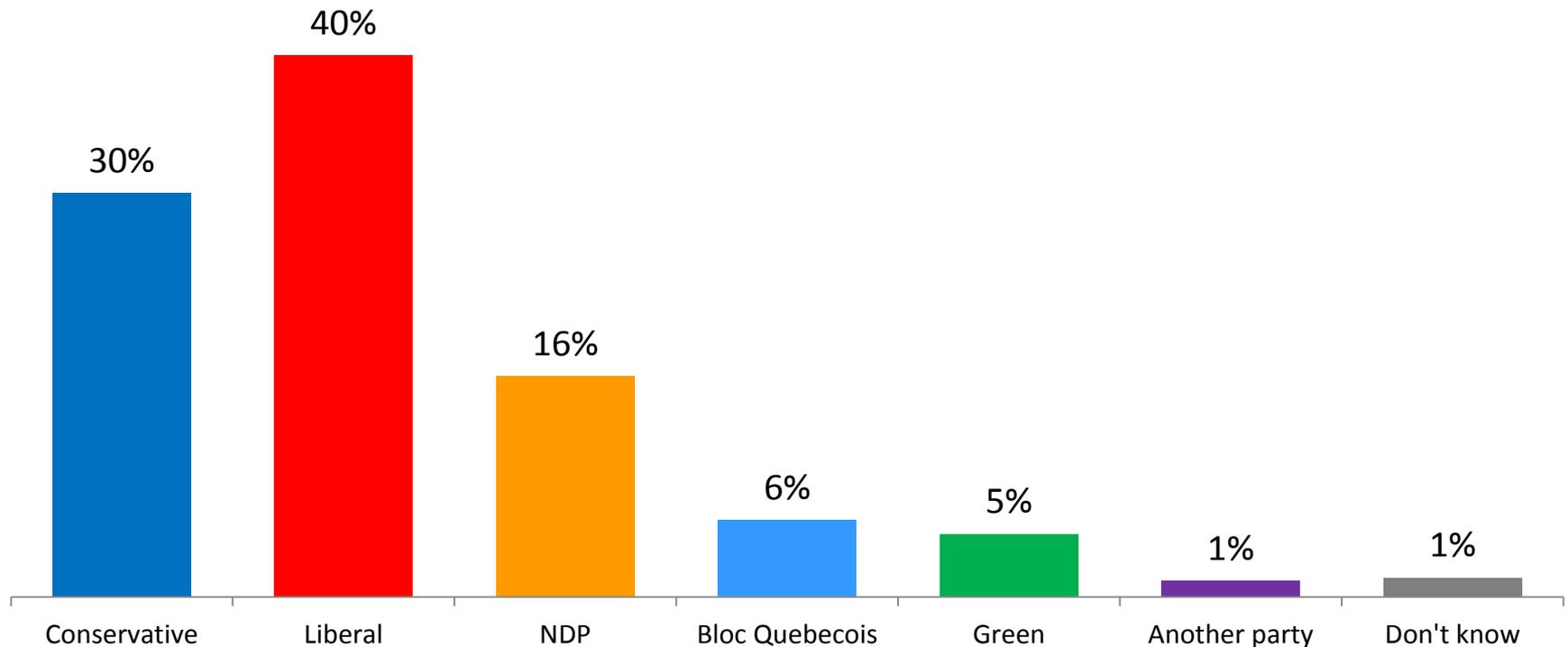
Note: "Was not old enough" (<1%) not shown

2015 General Election Reported Vote: 4-in-10 voted Liberal, 3-in-10 voted Conservative, 1-in-6 voted NDP



And which party did you vote for?

[asked only of respondents who identify as voters, n=1,739]

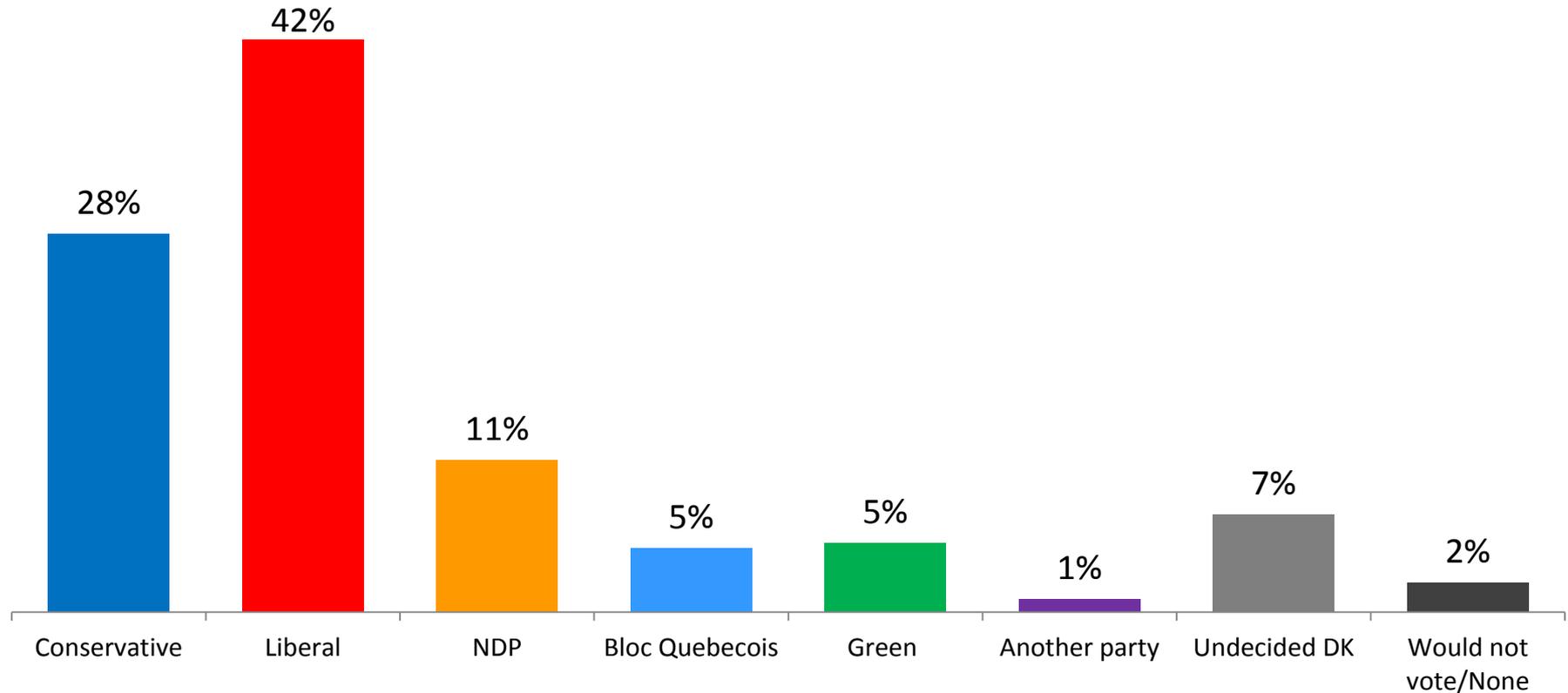


Combined Vote: Liberals have a strong lead over the Conservatives, NDP a distant third

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]

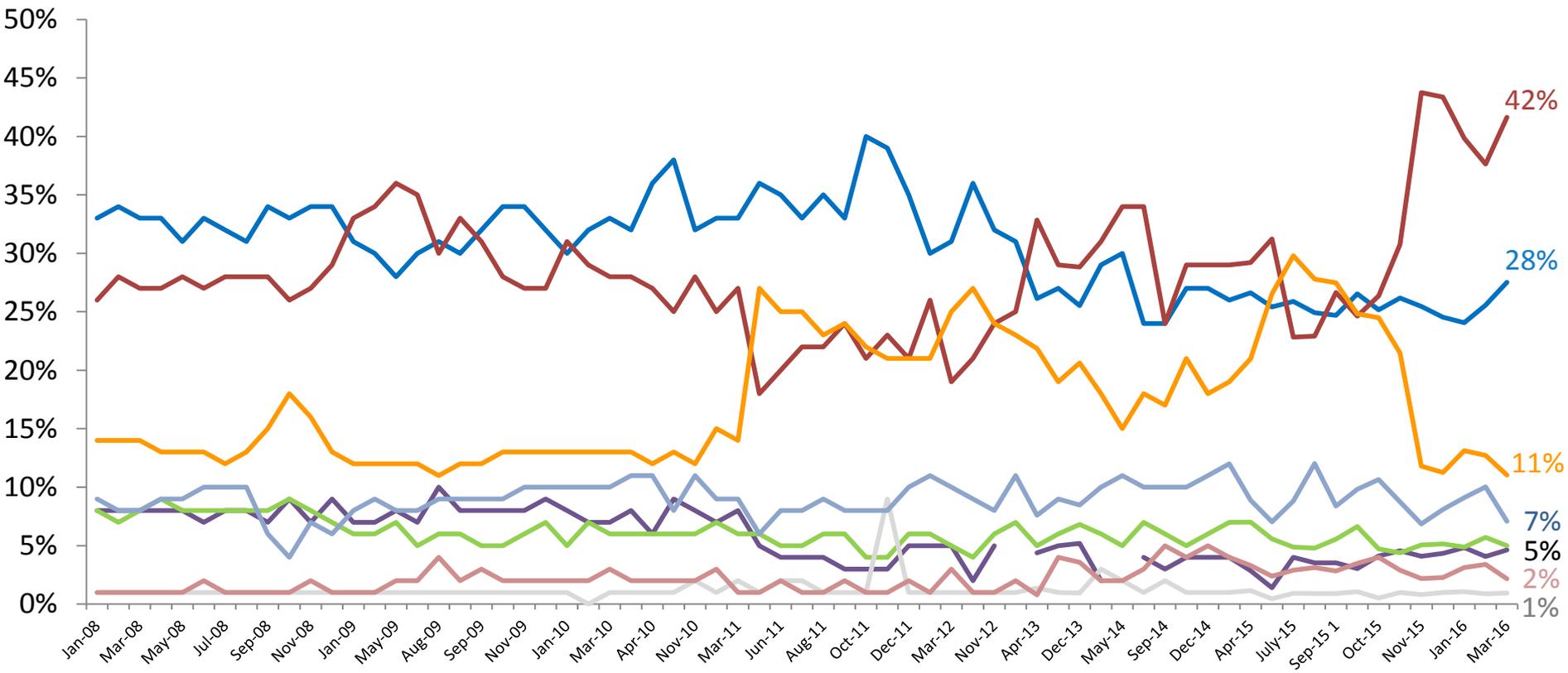
[asked of all respondents]



Combined Federal Vote: Liberals retain strong lead since the election; Conservatives fairly steady since 2013



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]



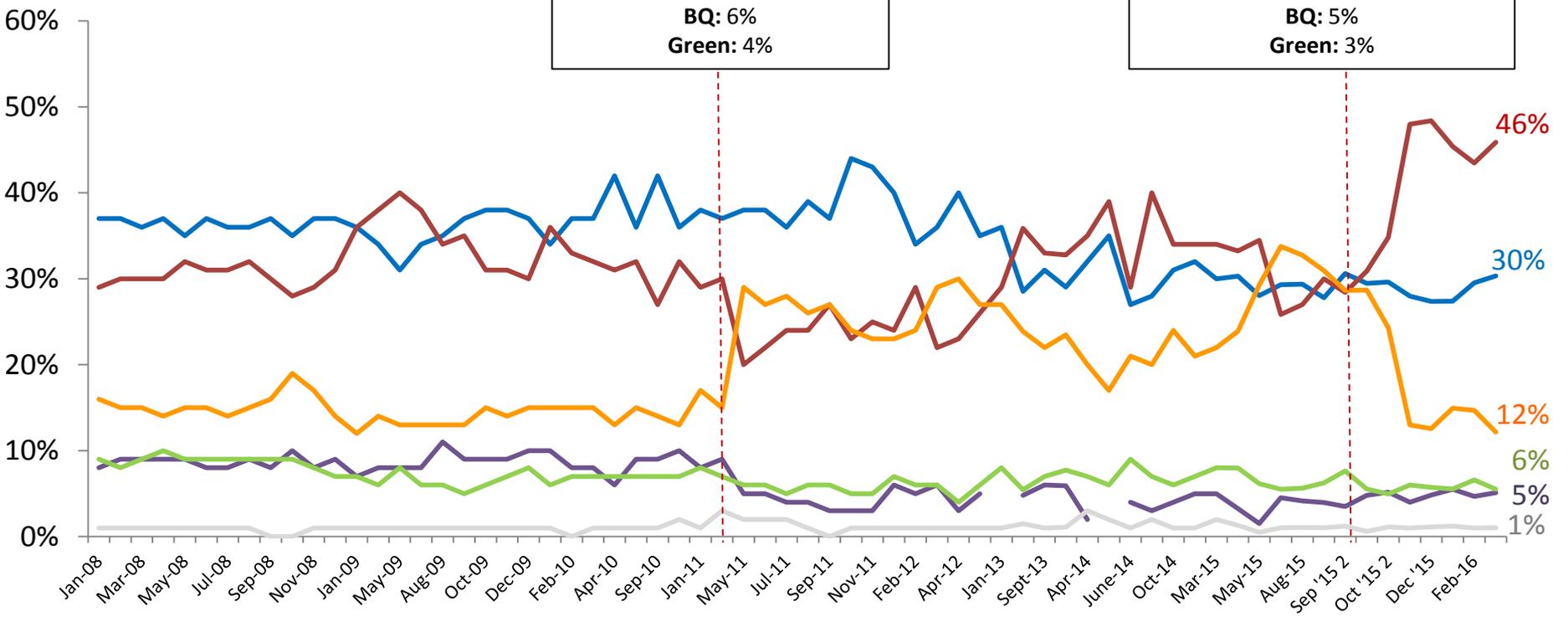
- The Conservative Party
- The Liberal Party
- The New Democratic Party
- The Bloc Québécois
- The Green Party
- Another party
- Undecided / don't know
- Would not vote / none

Decided Federal Vote: Liberals maintain a strong lead over the Conservatives since the election

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

October 2015 Federal Election:
 Liberals: 39%
 Conservatives: 32%
 NDP: 20%
 BQ: 5%
 Green: 3%



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

Combined Federal Vote by 2015 General Election Reported²²

Vote: over a quarter of NDP voters would vote Liberal

2015 General Election Reported Vote

	Liberal	Conservative	NDP	Bloc Quebecois	Green Party	Other	Don't know
Liberal	87%	5%	27%	10%	14%	5%	8%
Conservative	4%	88%	2%	3%	6%	10%	4%
NDP	4%	2%	56%	3%	0%	0%	4%
Bloc Quebecois	0%	0%	1%	74%	0%	0%	4%
Green Party	2%	1%	5%	1%	72%	0%	0%
Other	1%	1%	0%	0%	0%	35%	0%
Undecided/DK	3%	4%	8%	9%	9%	45%	80%
Would not Vote/None	0%	0%	0%	0%	0%	5%	0%

Note: Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution

Combined Federal Vote by Region

	Region					
	BC	AB	Prairies	ON	QC	Atlantic Canada
Liberal	35%	27%	46%	48%	36%	57%
Conservative	32%	54%	34%	28%	14%	17%
NDP	15%	6%	10%	11%	12%	8%
Bloc Quebecois					19%	
Green Party	9%	4%	2%	5%	4%	4%
Other	1%	1%	1%	1%	1%	2%
Undecided/DK	5%	6%	5%	5%	11%	9%
Would not Vote/None	3%	2%	2%	2%	3%	2%

Note: Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution

Combined Federal Vote by Value Cluster

Value Clusters

	Core Left	Left Liberals	Business Liberals	Deferential Conservatives	Populist Conservatives	Thrifty Moderates	Populist Liberals	Populist Left
Liberal	62%	56%	52%	38%	16%	39%	43%	43%
Conservative	2%	7%	22%	49%	70%	15%	19%	10%
NDP	22%	16%	9%	4%	4%	9%	12%	21%
Bloc Quebecois	5%	3%	5%	3%	2%	5%	8%	8%
Green Party	5%	14%	3%	2%	1%	6%	4%	9%
Other	0%	1%	0%	0%	2%	2%	1%	1%
Undecided/ DK	3%	3%	7%	4%	5%	17%	9%	5%
Would not Vote/None	1%	1%	2%	0%	1%	6%	3%	3%

Note: Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution

Combined Federal Vote by Party ID

	Party ID					
	Liberal	Conservative	NDP	Bloc Quebecois	Green/Other	Unaligned
Liberal	90%	9%	26%	16%	23%	27%
Conservative	4%	86%	1%	0%	24%	16%
NDP	1%	2%	69%	2%	5%	9%
Bloc Quebecois	1%	0%	0%	80%	1%	1%
Green Party	1%	0%	2%	0%	40%	5%
Other	0%	1%	0%	0%	3%	2%
Undecided/DK	2%	2%	2%	2%	4%	29%
Would not Vote/None	0%	0%	0%	0%	0%	11%

Note: Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution

Decided vote by Value cluster: Among Core Left, LPC support up 13 points & NDP support down 11 points since PE*

	Core Left					Left Liberals					Business Liberals					Deferential Conservatives				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Liberal	29%	37%	47%	51%	64%	33%	42%	44%	50%	58%	33%	41%	41%	54%	57%	23%	16%	25%	28%	40%
Conservative	3%	6%	1%	4%	2%	16%	17%	12%	16%	7%	33%	29%	27%	22%	24%	54%	62%	59%	52%	51%
NDP	60%	44%	39%	34%	23%	43%	28%	31%	25%	16%	26%	23%	22%	14%	10%	17%	16%	9%	13%	4%
Bloc Quebecois	2%	3%	6%	6%	5%	7%	2%	6%	3%	3%	3%	2%	5%	5%	6%	2%	2%	3%	3%	3%
Green/Other	6%	10%	7%	5%	6%	2%	11%	7%	6%	15%	4%	5%	4%	4%	3%	4%	3%	3%	4%	3%

Note: The Oct '15 wave of data collection was conducted in October 5th-8th, before the Federal Election.

* PE refers to the post-election survey conducted from Oct 20th-23rd, 2015.

Due to small n-sizes, results for Bloc Quebecois should be interpreted with caution.



Decided vote by Value cluster: LPC support increased among Thrifty Moderates and Populist Left since PE*

	Populist Conservatives					Thrifty Moderates					Populist Liberals					Populist Left				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Liberal	14%	12%	15%	19%	17%	23%	26%	40%	40%	51%	29%	30%	40%	48%	49%	29%	33%	33%	43%	47%
Conservative	64%	73%	71%	69%	75%	24%	25%	23%	23%	19%	18%	17%	22%	16%	22%	10%	7%	10%	7%	11%
NDP	15%	7%	8%	7%	4%	37%	29%	23%	20%	12%	38%	41%	28%	28%	13%	46%	44%	40%	36%	23%
Bloc Quebecois	1%	2%	2%	2%	2%	9%	6%	7%	11%	6%	7%	2%	3%	4%	10%	7%	6%	9%	7%	8%
Green/Other	6%	5%	4%	4%	3%	7%	14%	7%	5%	11%	9%	10%	7%	4%	6%	9%	10%	9%	7%	11%

Note: The wave of Oct '15 was conducted in October 5th-8th, before the General Election.

* PE refers to the post-election survey conducted from Oct 20th-23rd.

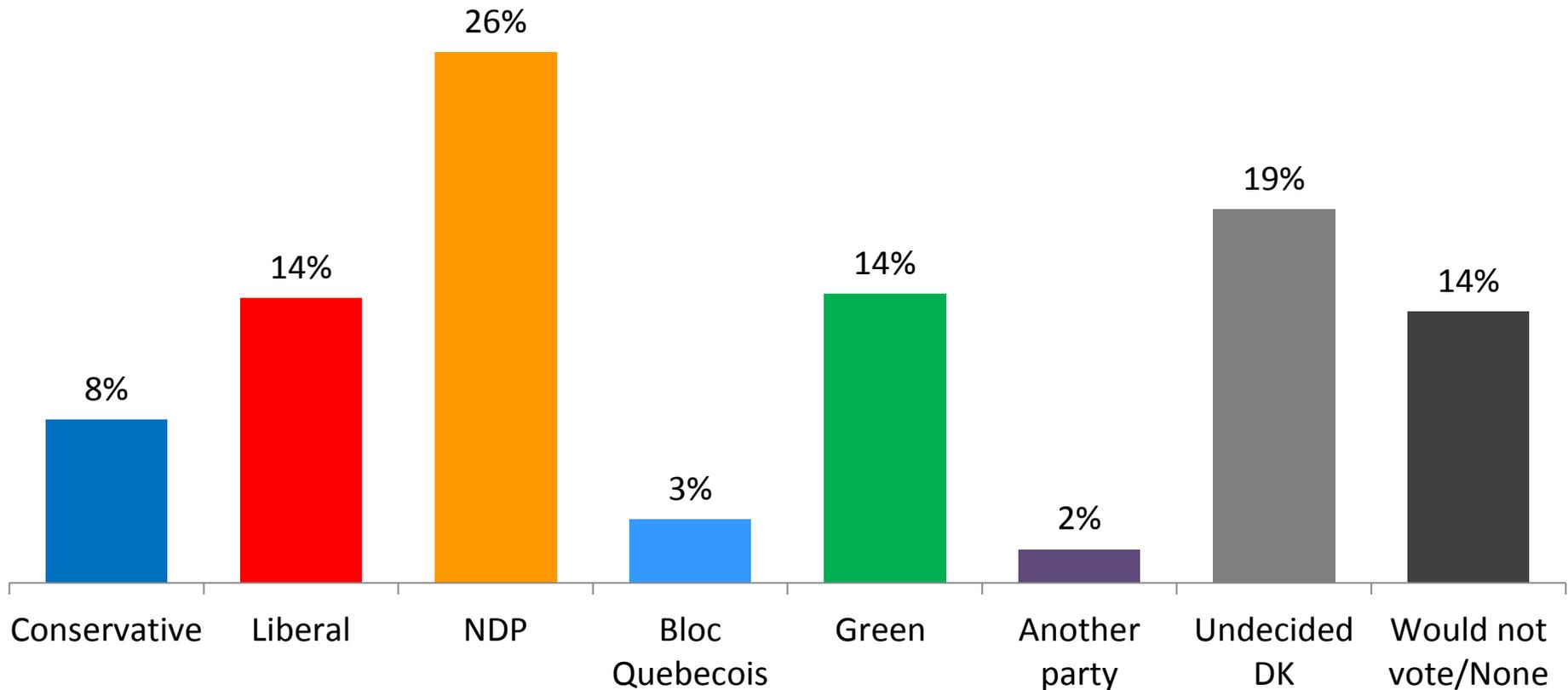
Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution.

Second choice: NDP most popular for second choice, followed by Liberals and then the Conservatives

Q

And which party would be your second choice?

[asked only of respondents who chose one of the major five parties, n=1,812]



Second Choice by Combined: 2nd choice Liberal vote goes to NDP, while 2nd choice NDP vote goes to Liberals

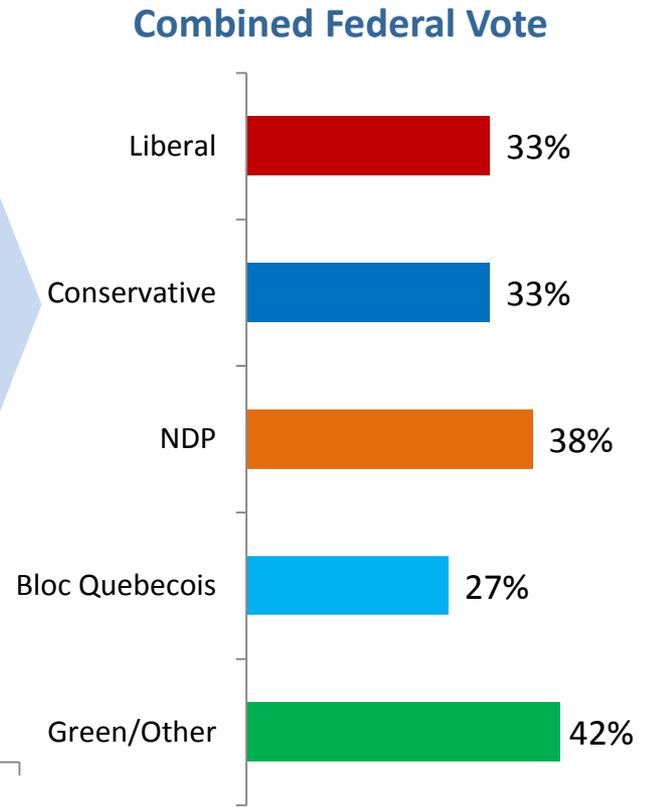
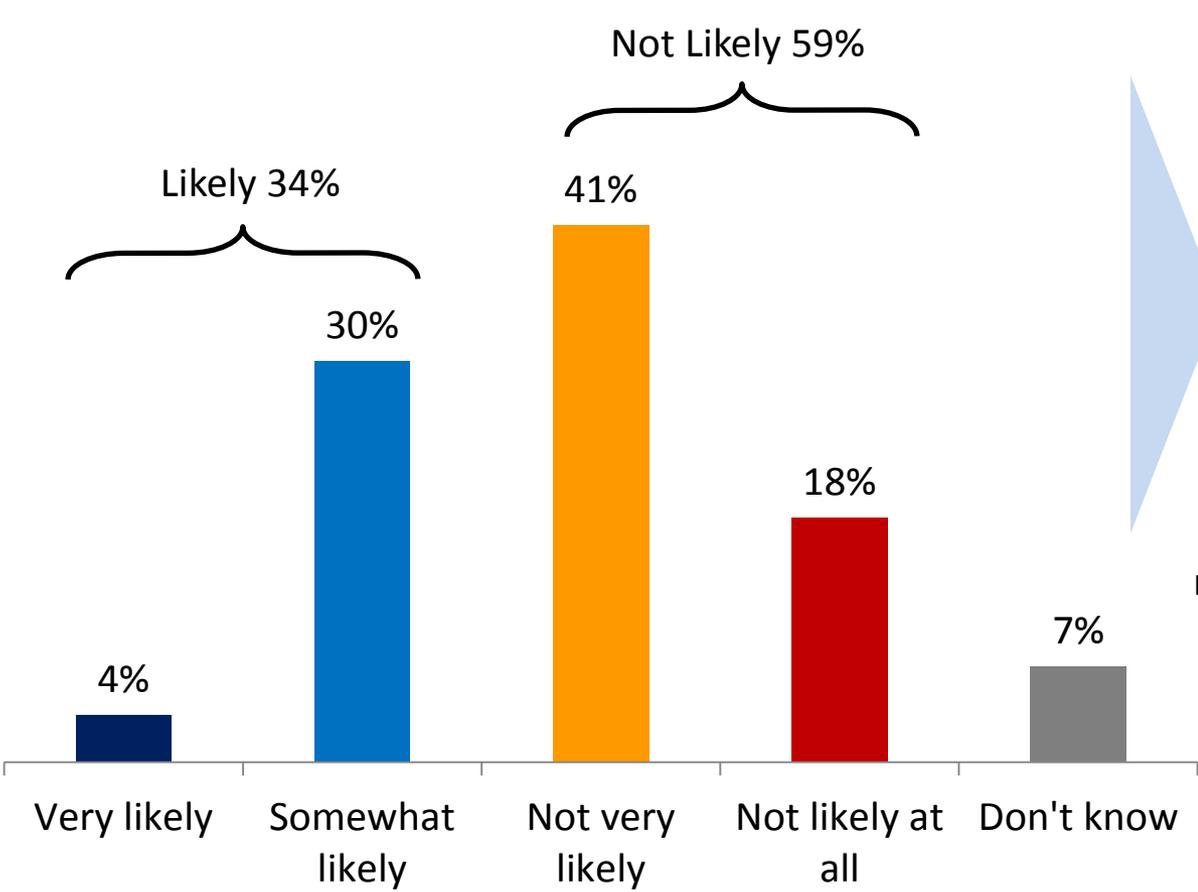
Q And which party would be your second choice?

	Conservative 1 st choice	Liberal 1 st choice	NDP 1 st choice	Bloc Quebecois 1 st choice	Green 1 st choice
Conservative 2 nd choice		12%	8%	8%	3%
Liberal 2 nd choice	17%		43%	10%	49%
NDP 2 nd choice	12%	45%		22%	22%
Bloc Quebecois 2 nd choice	2%	4%	7%		6%
Green 2 nd choice	9%	17%	24%	20%	
Other	3%	0%	1%	1%	7%
Would not vote	30%	7%	6%	19%	3%
Undecided/DK	26%	16%	10%	20%	9%

Likely to change to 2nd choice: about a third likely to vote for³⁰ second choice; Green and NDP voters are most likely to switch

Q How likely is it you may change your mind and vote for your second choice?
 [asked only of respondents who had a second choice, n=1,231]

Sample Breakdown ▶▶
Those who say "likely"



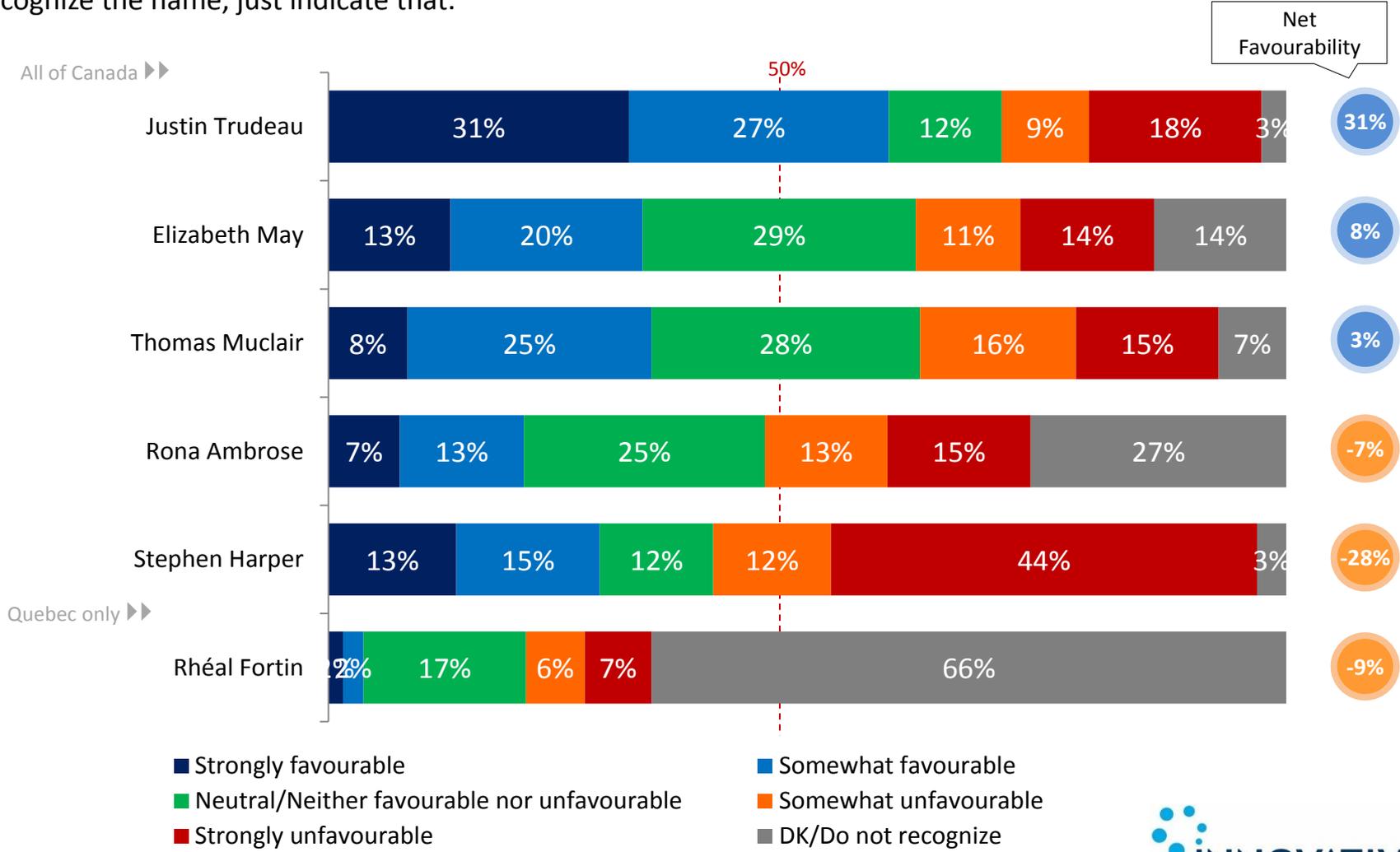
Note: Due to small n-sizes, results for the Bloc Quebecois should be interpreted with caution

Leader Impressions: Trudeau has highest net favourability.

Ambrose lesser known but more popular than Harper

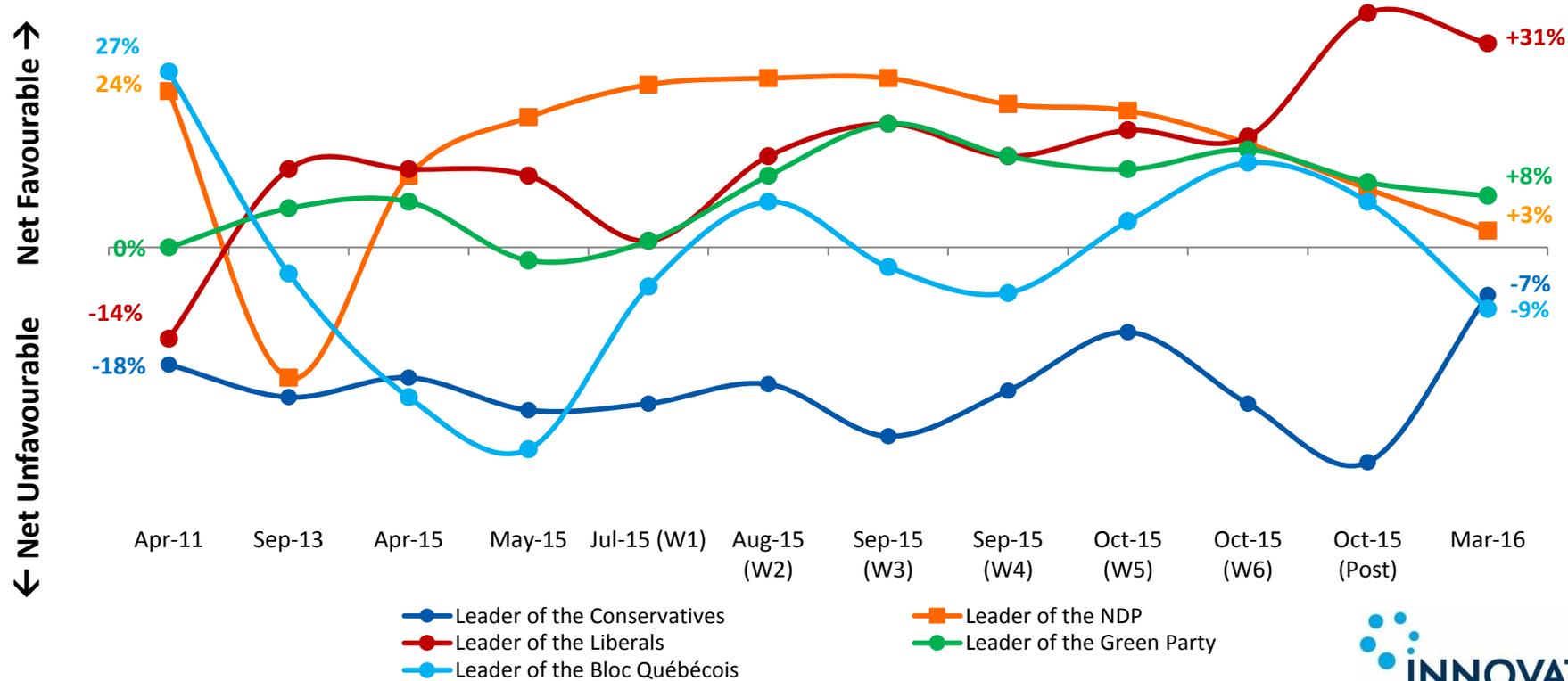
Q

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.



Net leader favourables: PM Trudeau remains strongly in the lead, impression of Conservative leader improves as Ambrose takes over

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. **Net favourables (% favourable-unfavourable) INCLUDES 'HAVE NOT HEARD' for tracking consistency.**



Note: BQ leaders asked in Quebec Only. Leaders shown are those in the running at the time of survey

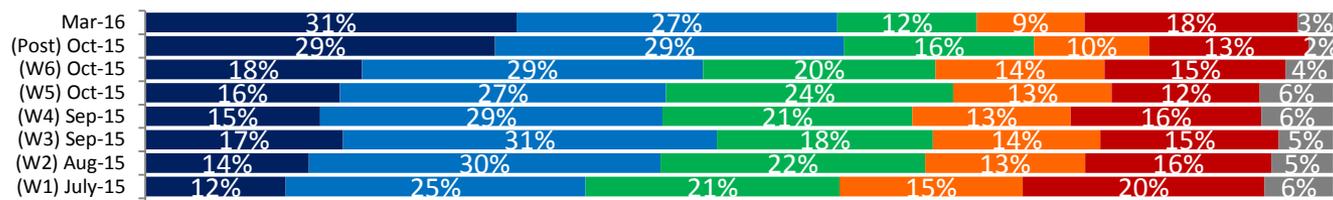


Leader Impressions: Mulcair's overall favourability down 6 points since post election survey

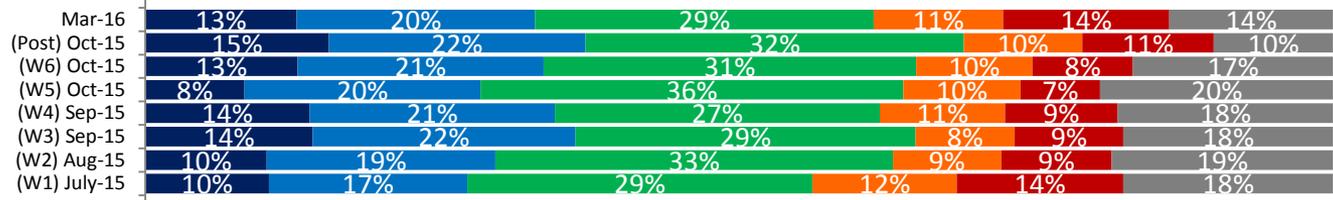
Q Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

All of Canada ▶▶

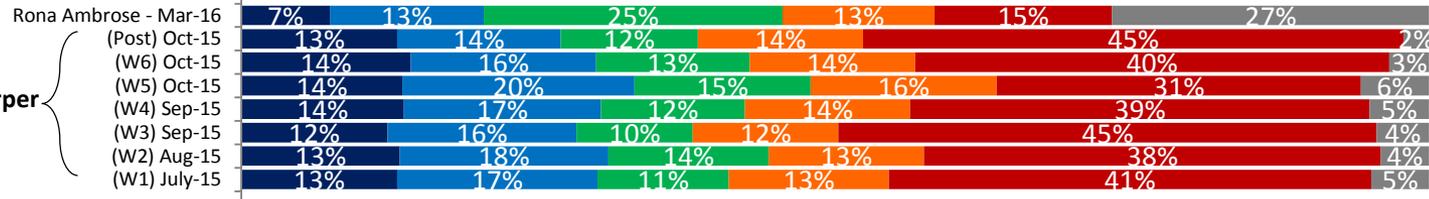
Justin Trudeau



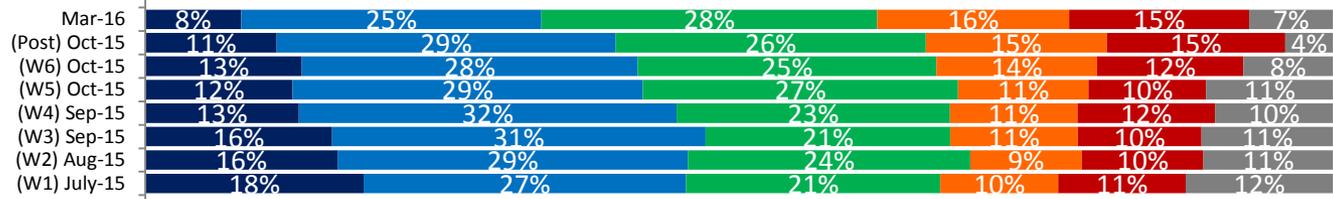
Elizabeth May



Stephen Harper

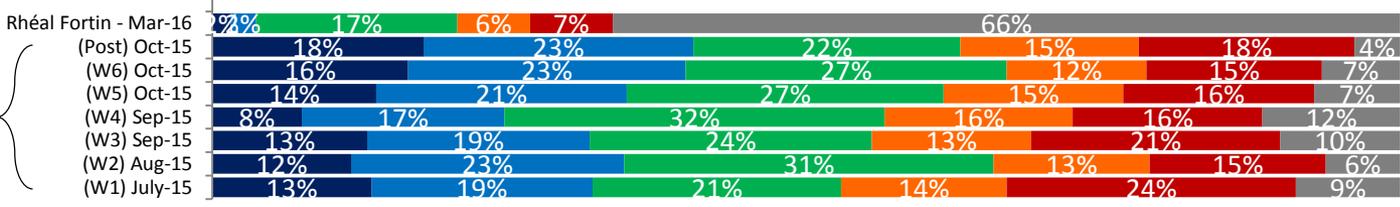


Thomas Mulcair



Quebec only ▶▶
N=478

Gilles Duceppe



■ Strongly favourable ■ Somewhat favourable
■ Neutral/Neither favourable nor unfavourable ■ Somewhat unfavourable
■ Strongly unfavourable ■ DK/Do not recognize

Net leader favourables by Value cluster: Trudeau support increased amongst most deferential groups

Net Favourability	Core Left					Left Liberals					Business Liberals					Deferential Conservatives				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Justin Trudeau	+25	+42	+51	+65	+77	+16	+37	+49	+62	+69	+9	+25	+31	+56	+56	-13	-10	-8	+14	+11
Stephen Harper/ Rona Ambrose	-87	-77	-89	-85	-49	-41	-51	-52	-43	-36	-13	-23	-19	-41	-8	+19	+28	+24	+15	+14
Thomas Mulcair	+75	+60	+59	+37	+34	+33	+44	+37	+38	+24	+19	+18	+18	+5	+10	+17	-1	-15	-23	-17
Gilles Duceppe/ Rhéal Fortin	+3	-2	+41	+26	-20	+27	-3	+29	+4	-5	-13	-13	+21	+18	-7	-38	-22	-16	-14	-12
Elizabeth May	+53	+50	+62	+56	+52	+6	+38	+37	+37	+42	-2	+14	+15	+18	+14	-15	-6	-8	+3	-13

Note: The wave of Oct '15 was conducted in October 5th-8th, before the General Election.

PE refers to the post-election survey conducted from Oct 20th-23rd.

Duceppe and Fortin results (QC only) are based on small sub-samples and should be interpreted with caution.

Net leader favourables by Value cluster: Trudeau support up and Mulcair support down amongst most populist groups

Net Favourability	Populist Conservatives					Thrifty Moderates					Populist Liberals					Populist Left				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Justin Trudeau	-45	-42	-32	-24	-41	+6	+14	+20	+27	+33	+11	+31	+26	+43	+43	+13	+33	+24	+55	+47
Stephen Harper/ Rona Ambrose	+38	+48	+41	+34	+39	-21	-14	-26	-25	-9	-46	-45	-33	-52	-13	-67	-65	-63	-70	-35
Thomas Mulcair	-20	-28	-32	-38	-41	+26	+23	+14	+7	+14	+30	+29	+19	+27	+13	+47	+48	+44	+35	+9
Gilles Duceppe/ Rhéal Fortin	-46	-27	-8	-17	-15	0	-5	-1	+8	-6	+2	+12	+27	+11	0	+8	-4	+35	+16	-19
Elizabeth May	-42	-29	-18	-28	-40	+3	+11	+6	+7	+3	+7	+20	+21	+25	+16	+20	+35	+33	+34	+24

Note: The wave of Oct '15 was conducted in October 5th-8th, before the General Election.

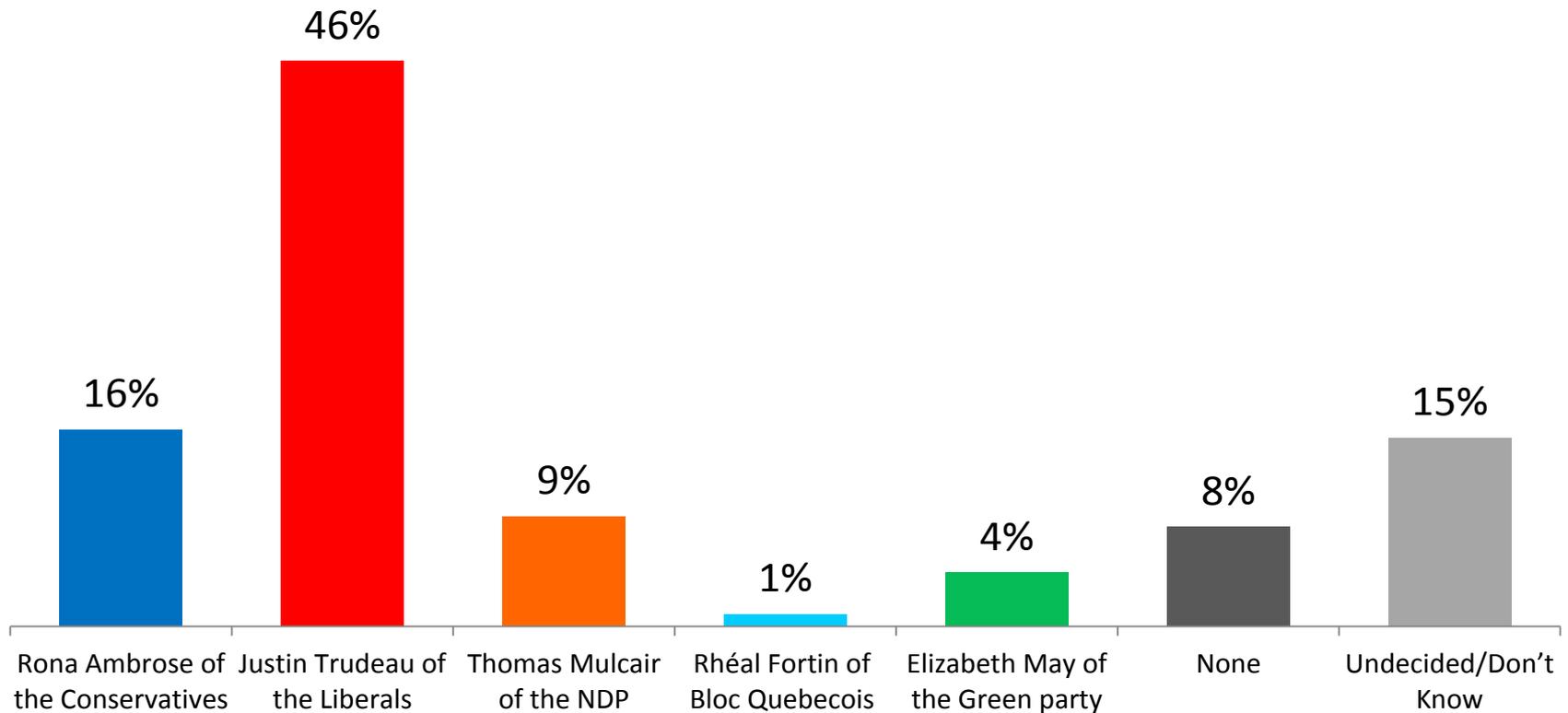
PE refers to the post-election survey conducted from Oct 20th-23rd.

Duceppe and Fortin results (QC only) are based on small sub-samples and should be interpreted with caution.

Best Prime Minister: close to half of Canadians think Trudeau would be the best PM; Ambrose a distant second

Q

Which of the following party leaders would make the best Prime Minister of Canada?

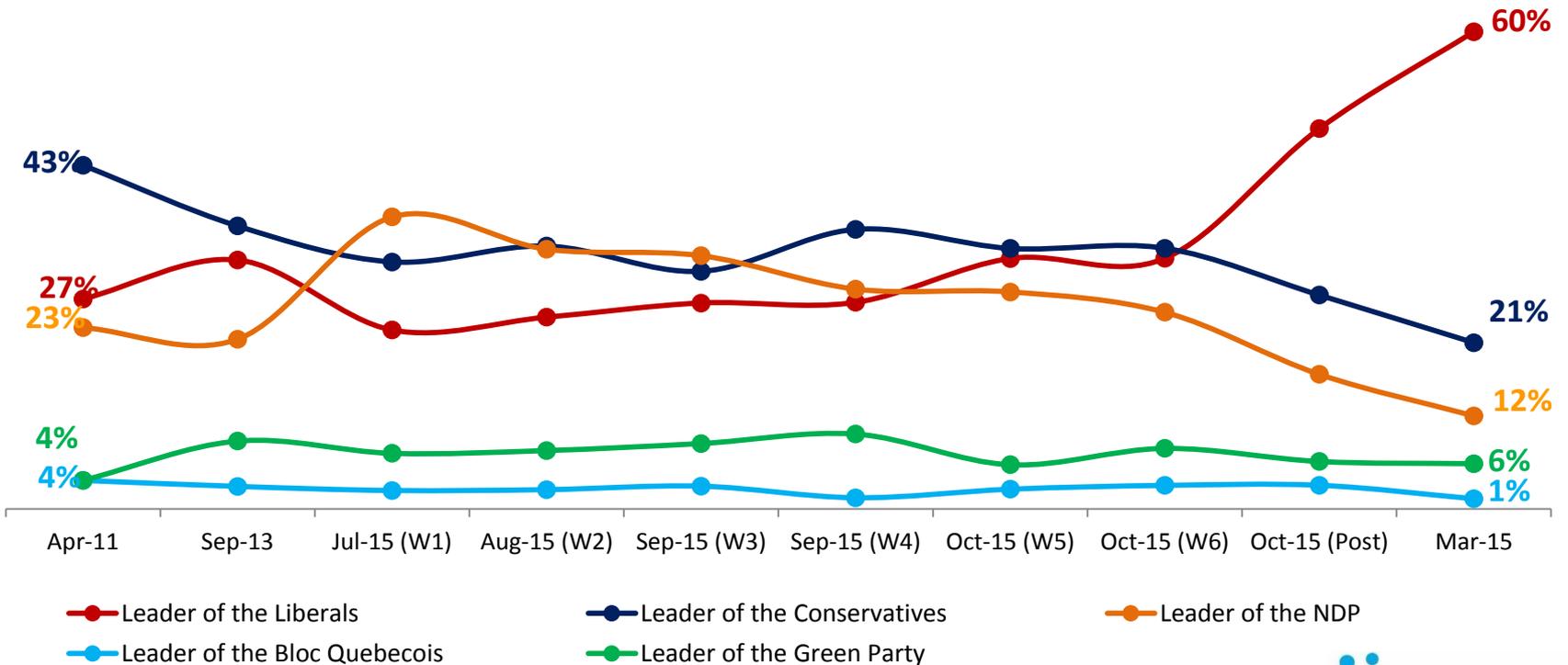


Best Prime Minister - Decided: 6-in-10 now choose Trudeau³⁷ as best PM, widening gaps with leaders of LPC and CPC



Which of the following party leaders would make the best Prime Minister of Canada?

[Results show decided only, n=1,530]



Note: 'None', 'Don't know', 'Refused' not included in calculations. Leaders of Bloc are asked in QC only.

Best Prime Minister by Value cluster: gap widens between Trudeau and Mulcair in farthest left groups

	Core Left					Left Liberals					Business Liberals					Deferential Conservatives				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Justin Trudeau	20%	33%	39%	57%	70%	26%	35%	41%	56%	74%	26%	32%	38%	62%	75%	21%	16%	21%	31%	50%
Stephen Harper/ Rona Ambrose	3%	5%	3%	2%	2%	19%	20%	15%	14%	5%	36%	36%	30%	20%	9%	49%	68%	65%	56%	42%
Thomas Mulcair	63%	44%	40%	23%	15%	45%	33%	32%	22%	9%	28%	26%	24%	12%	12%	24%	14%	10%	9%	5%
Gilles Duceppe/ Rhéal Fortin	1%	0%	3%	4%	2%	3%	1%	3%	1%	1%	3%	2%	3%	2%	1%	1%	1%	0%	1%	1%
Elizabeth May	12%	17%	15%	14%	12%	4%	11%	9%	6%	11%	5%	4%	5%	4%	3%	4%	1%	4%	2%	2%

Note: 'None', 'Don't know', 'Refused' not included in calculations.

Best Prime Minister by Value cluster: gap widens between Trudeau and Mulcair in farthest left groups

	Populist Conservatives					Thrifty Moderates					Populist Liberals					Populist Left				
	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16	July '15	Sept '15	Oct '15	PE	Mar '16
Justin Trudeau	11%	9%	11%	22%	29%	25%	27%	37%	50%	64%	26%	32%	38%	56%	64%	25%	34%	33%	54%	63%
Stephen Harper/ Rona Ambrose	68%	80%	77%	69%	63%	24%	32%	25%	24%	14%	20%	19%	25%	16%	13%	11%	11%	11%	8%	10%
Thomas Mulcair	15%	9%	8%	7%	6%	39%	28%	25%	16%	17%	39%	33%	25%	19%	15%	50%	39%	40%	26%	17%
Gilles Duceppe/ Rhéal Fortin	1%	0%	1%	1%	1%	3%	2%	5%	5%	1%	3%	3%	3%	2%	3%	3%	3%	5%	4%	1%
Elizabeth May	3%	3%	3%	1%	1%	5%	12%	7%	4%	4%	10%	13%	10%	7%	4%	9%	14%	11%	9%	9%

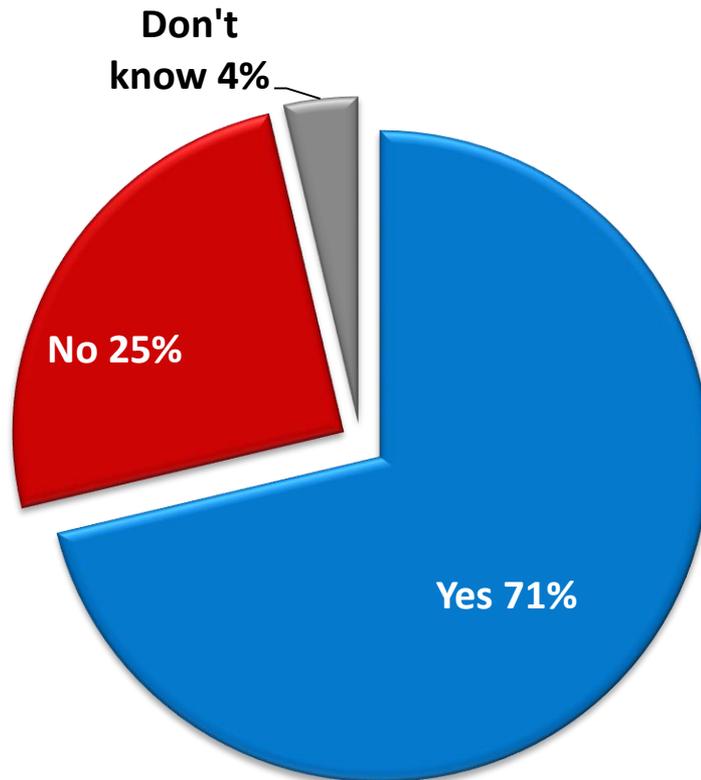
Note: 'None', 'Don't know', 'Refused' not included in calculations.

Reaction to Federal Budget

RSH Budget: 7-in-10 are aware of the budget, highest amongst Populist Conservatives

Q Have you read, seen or heard anything about the recent federal budget that was presented in Parliament on Tuesday, March 22nd, 2016?

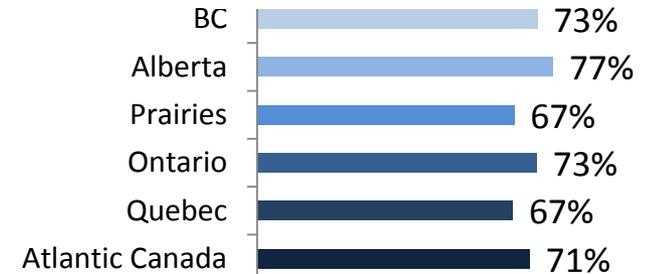
[asked of all respondents]



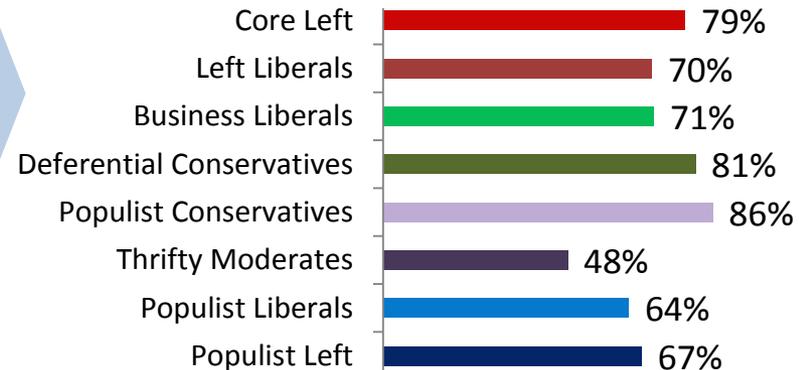
Sample Breakdown ▶▶

Those who say "yes"

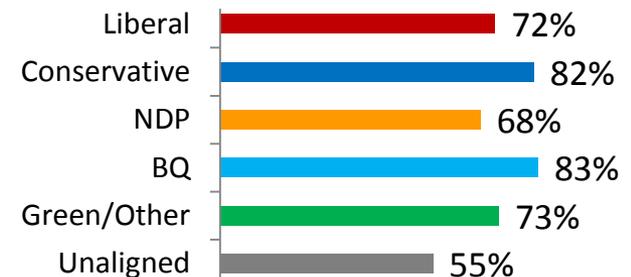
Region



Value Cluster



Party ID

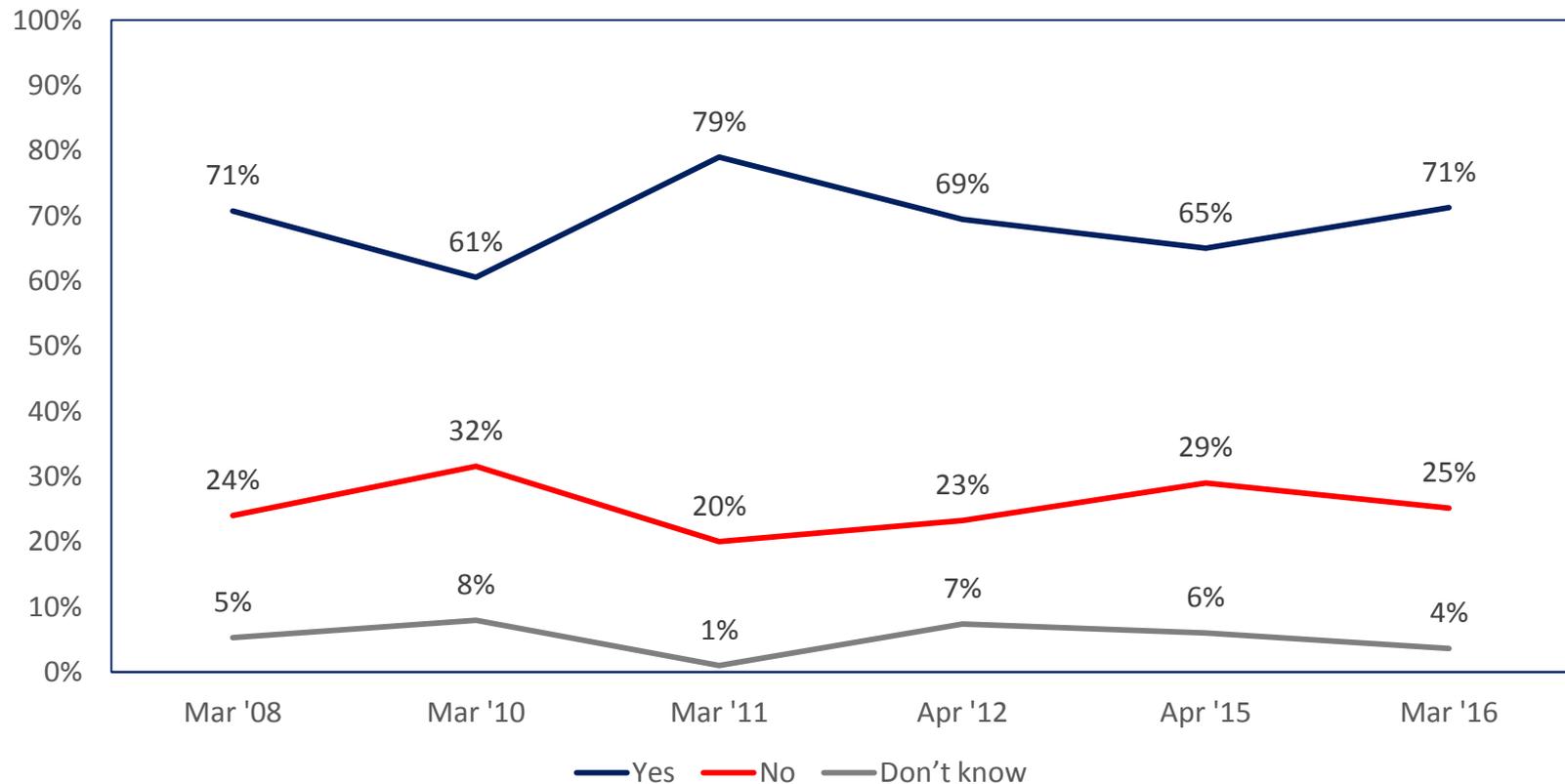


RSH Budget: awareness is stable since April '12



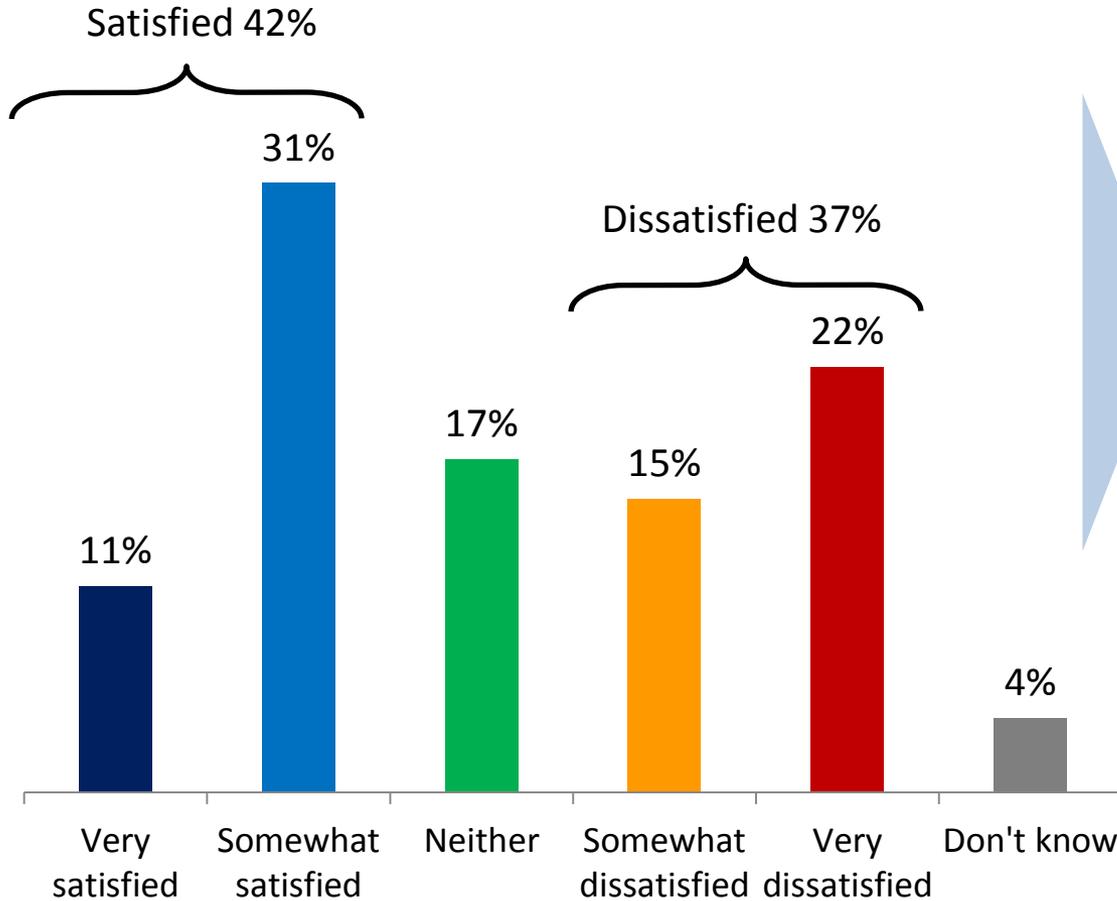
Have you read, seen or heard anything about the recent federal budget that was presented in Parliament on [DATE]?

[asked of all respondents]



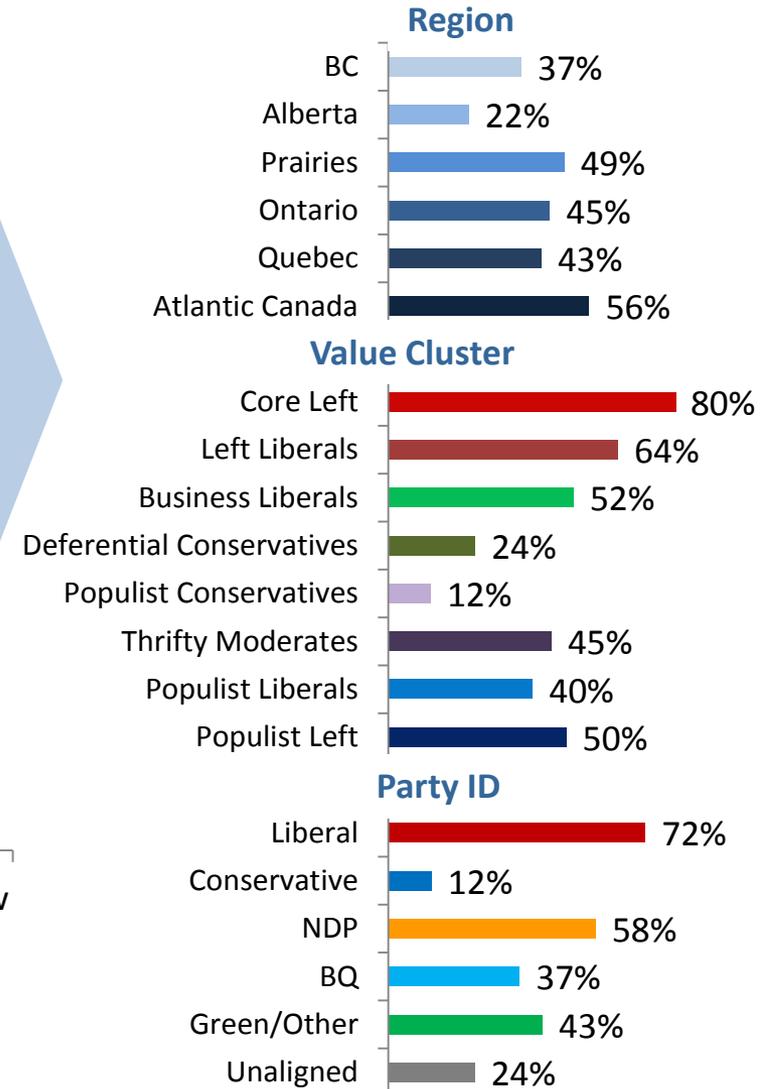
Satisfaction with Budget: though a plurality are satisfied, dissatisfaction is more intense than satisfaction

Q In general, how satisfied are you with the federal budget?
[asked of those aware of budget: n=1,425]



Sample Breakdown ▶▶

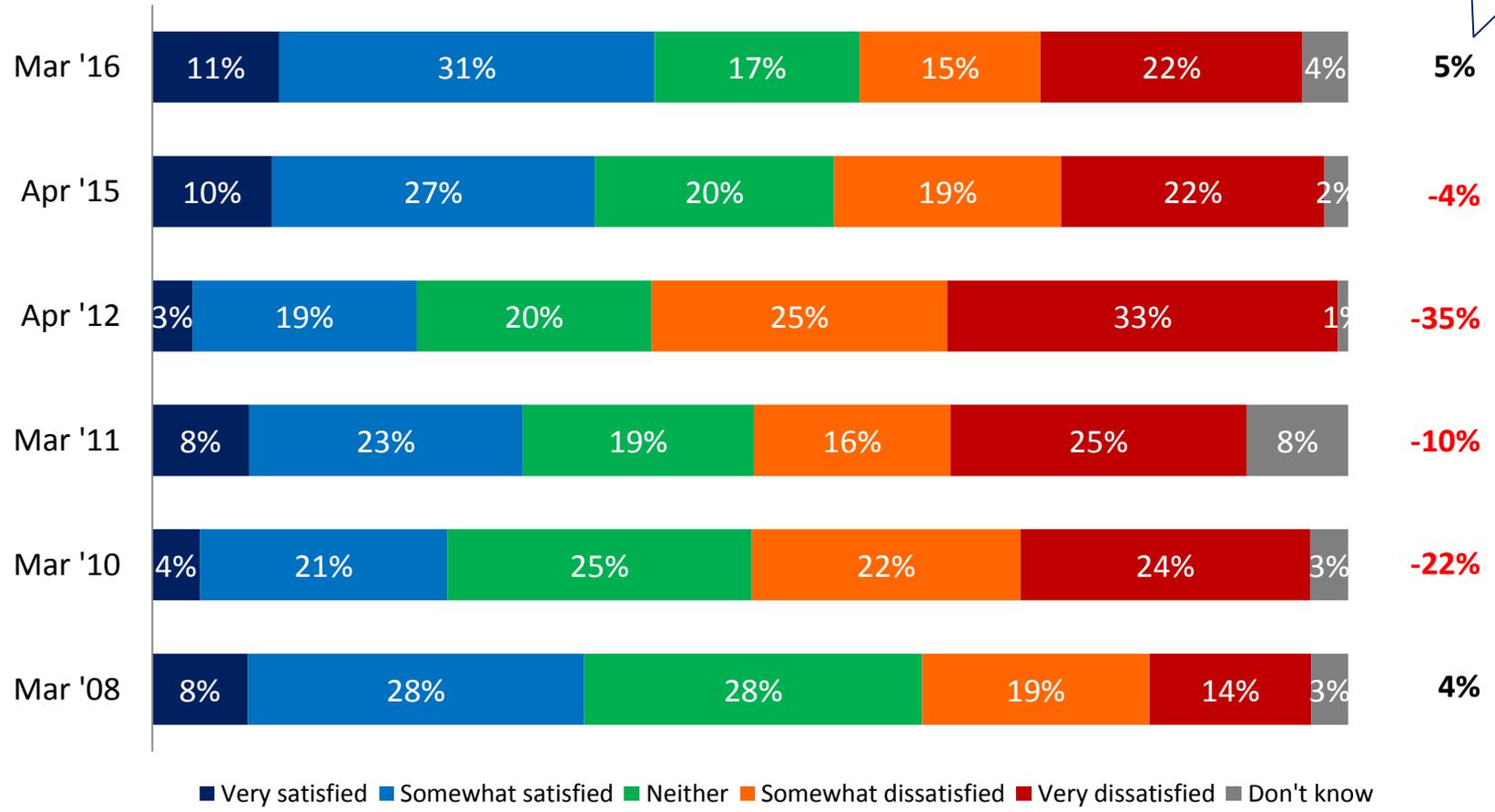
Those who say "satisfied"



Satisfaction with Budget: net satisfaction up 9 points from 2015 budget and 40 points from 2012 budget

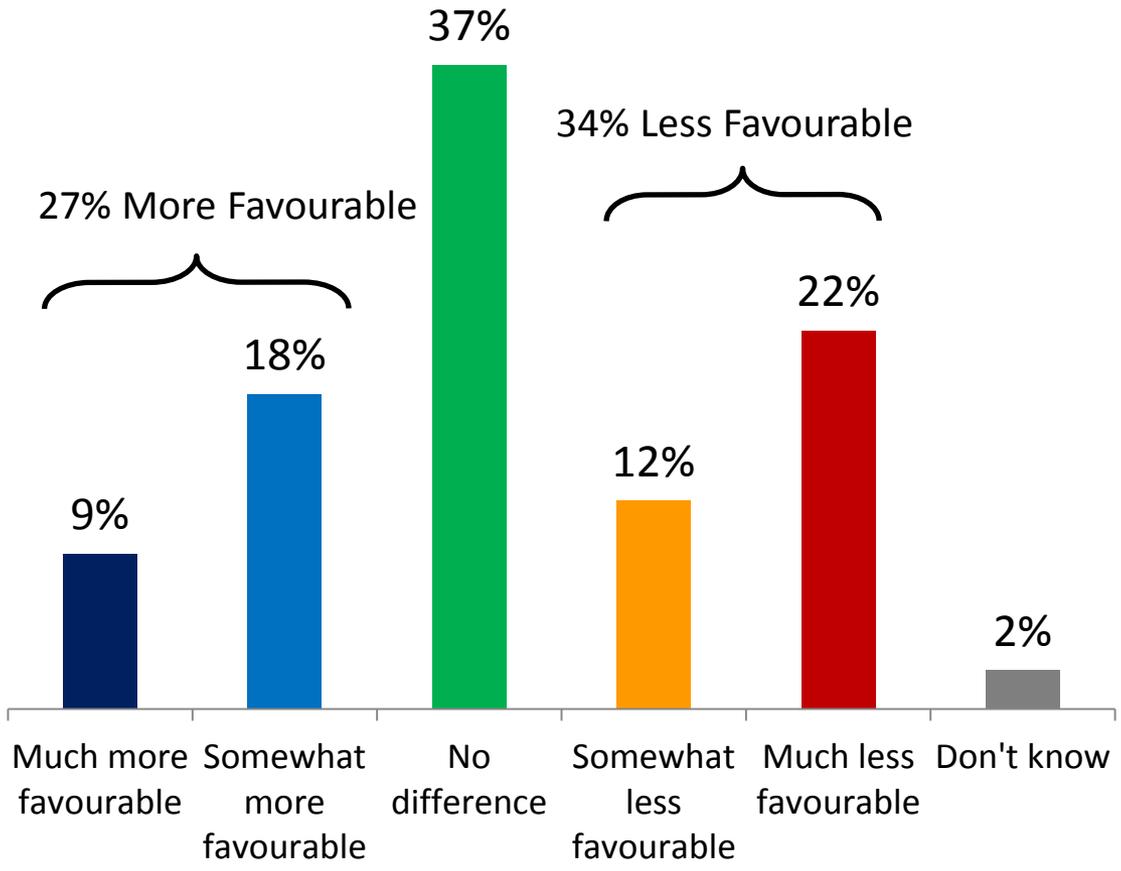
Q In general, how satisfied are you with the federal budget?
[asked of those aware of budget, n=1,425]

Net Satisfaction



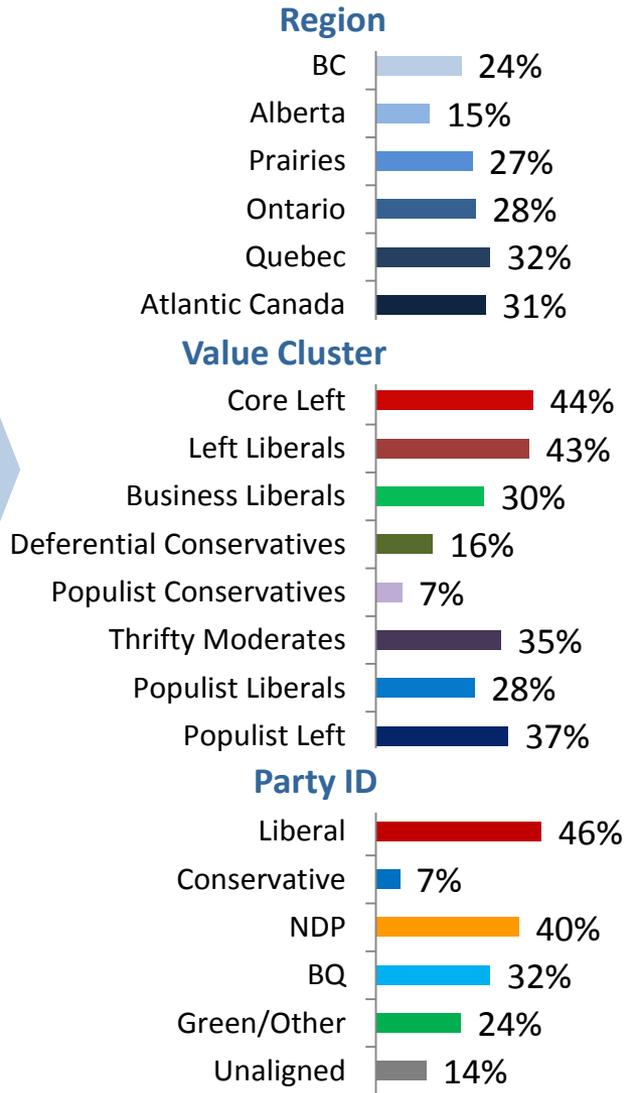
Impression of Budget: budget leaves a plurality neutral, but more are feeling less favourable than more favourable

Q Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, a lot less favourable towards the federal government?
 [asked of those aware of budget: n=1,425]



Sample Breakdown ▶▶

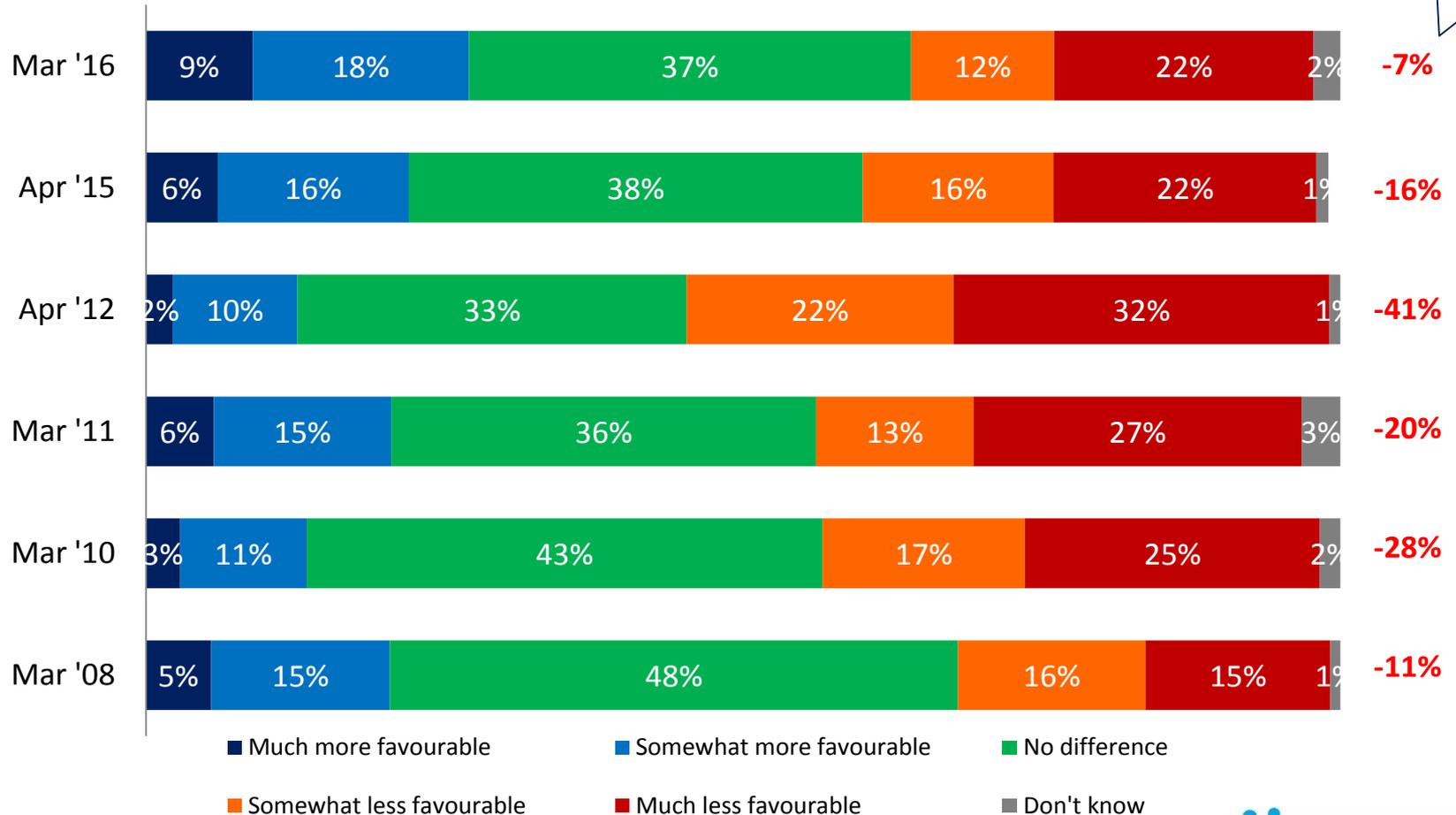
Percentage who say "more favourable"



Impression of Budget: remains negative, but significantly less negative than previous years' budgets

Q Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, a lot less favourable towards the federal government?
[asked of those aware of budget, n=1,425]

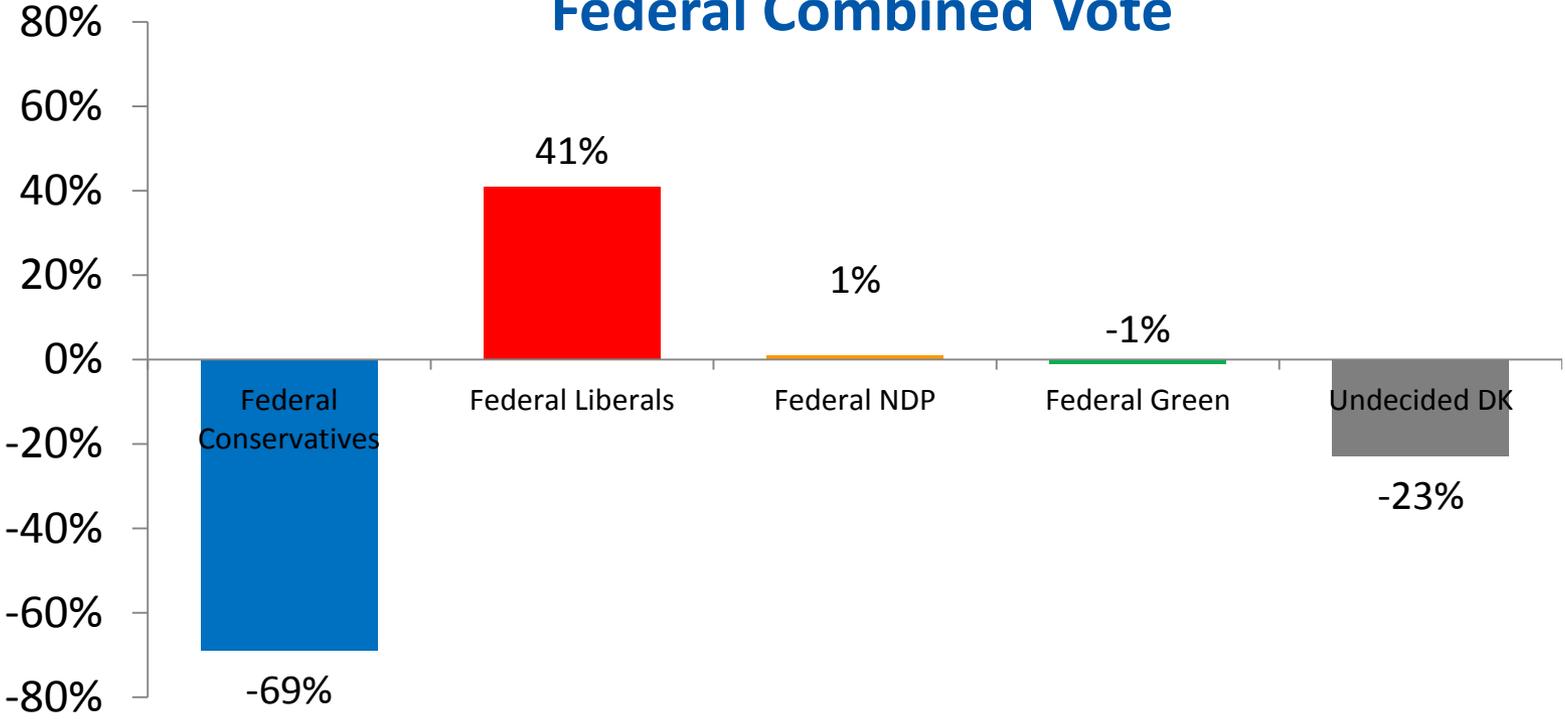
Net Favourability



Impression by Federal Combined Vote: negative impression strongest among CPCs, followed by undecided voters

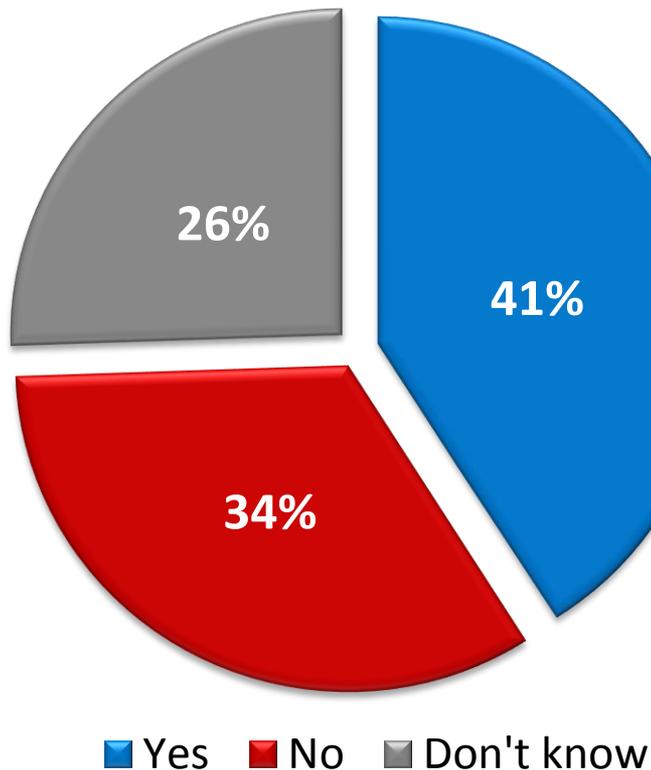
Q Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, or a lot less favourable towards the federal government?
[asked of those aware of budget]

Impression of Federal Budget after RSH by Federal Combined Vote



Personal impact by budget: 2-in-5 anticipate personal impact of budget, especially Conservatives

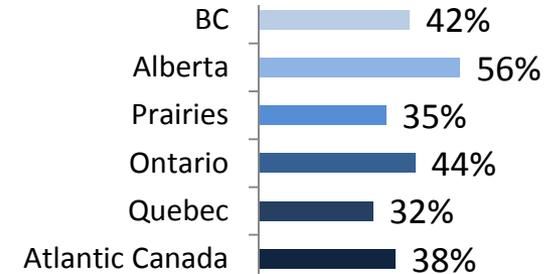
Q Do you think your own personal situation will be directly impacted by the new Liberal federal budget?
[asked of all respondents]



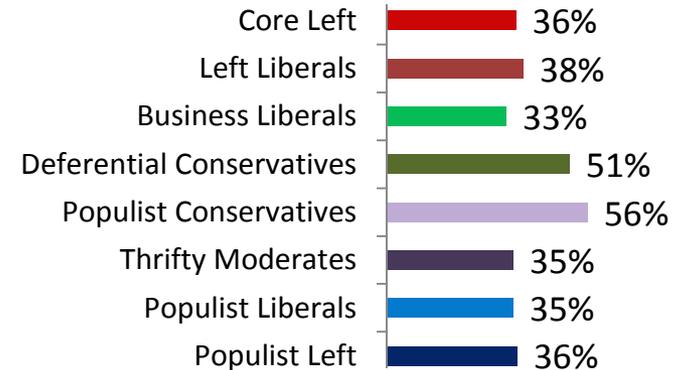
Sample Breakdown ▶▶

Those who say "yes"

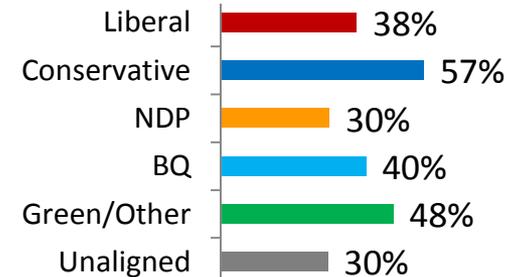
Region



Value Cluster



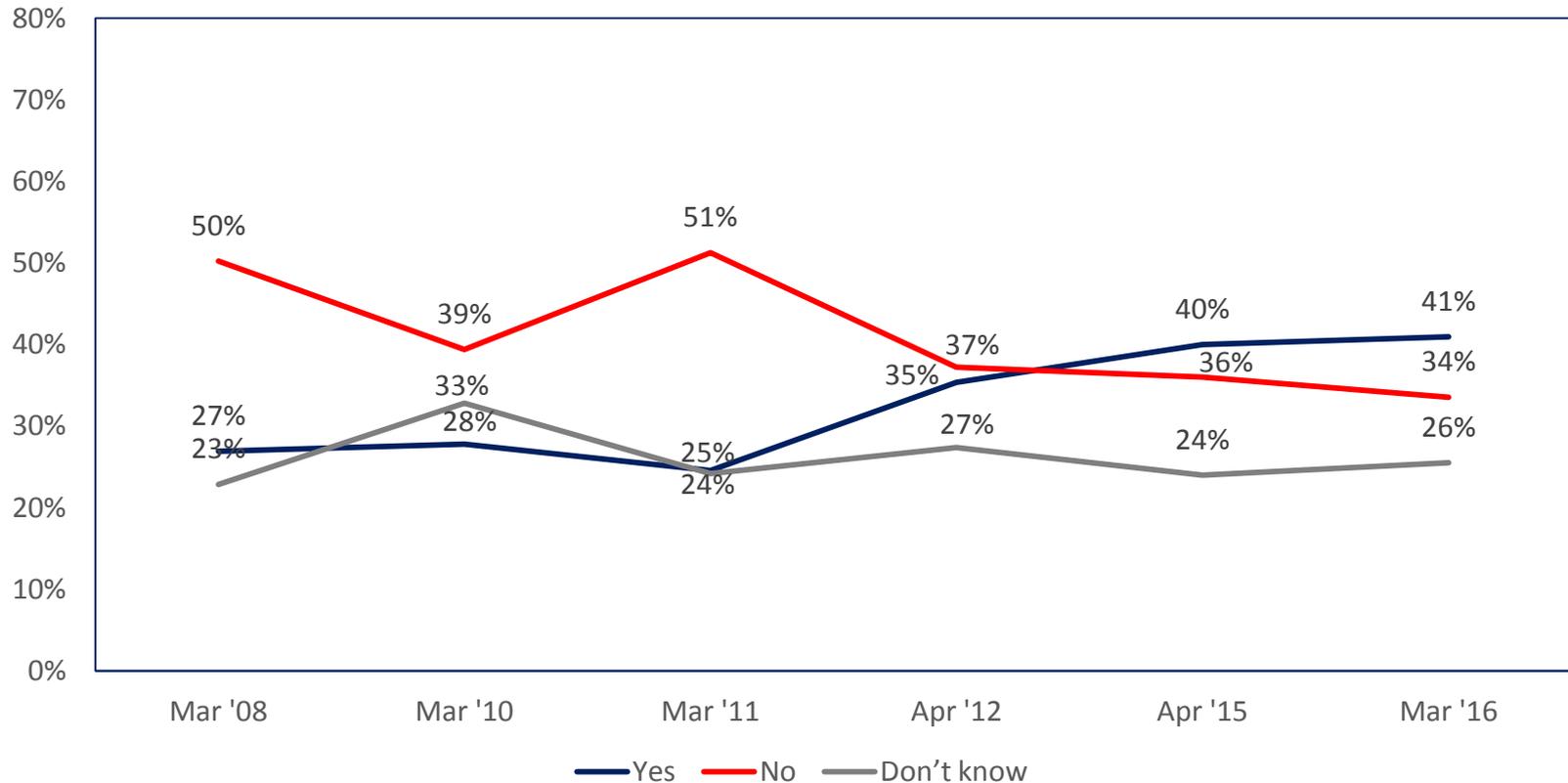
Party ID



Personal impact by budget: gap widening between those who anticipate a personal impact and those who don't



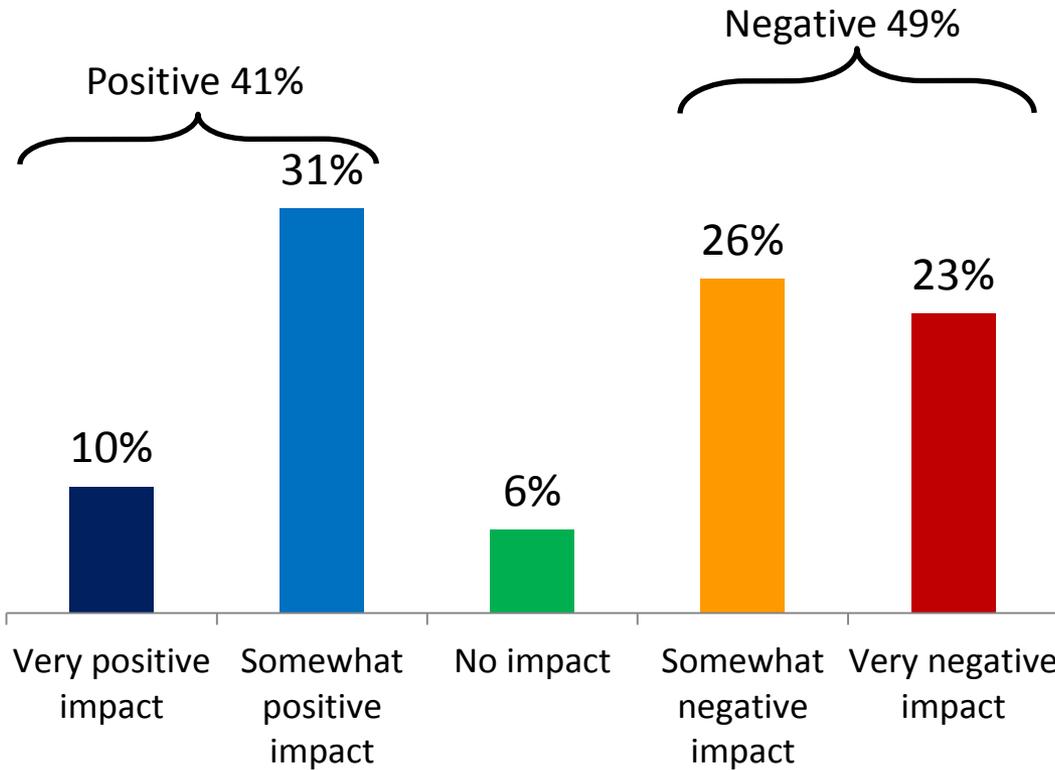
Do you think your own personal situation will be directly impacted by the new [PARTY] federal budget?
[asked of all respondents]



Impact: slightly more expect a negative personal impact; Core Left and Liberals most likely to expect positive impact



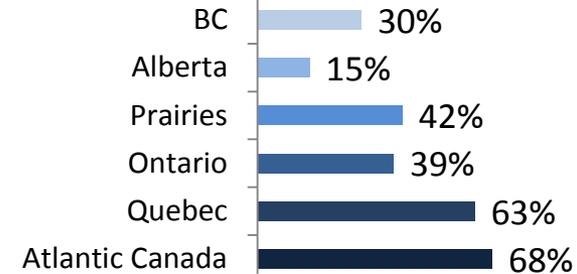
[IF YES] Would that be a positive or a negative impact?
[asked of those who feel they would be impacted: n=819]



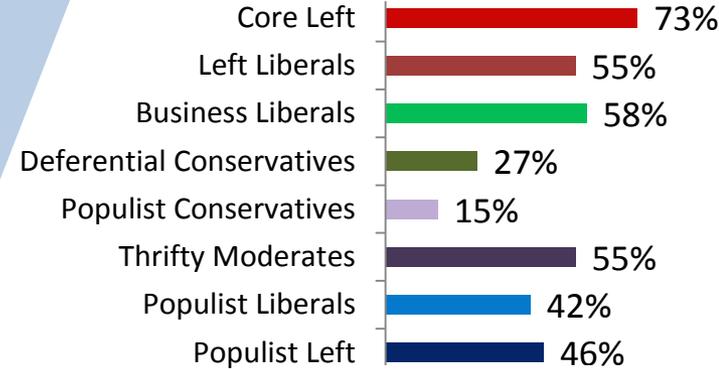
Sample Breakdown ▶▶

Those who say "positive"

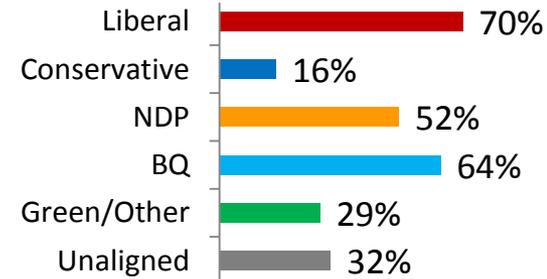
Region



Value Cluster



Party ID



Note: 'Don't know' (4%) not shown

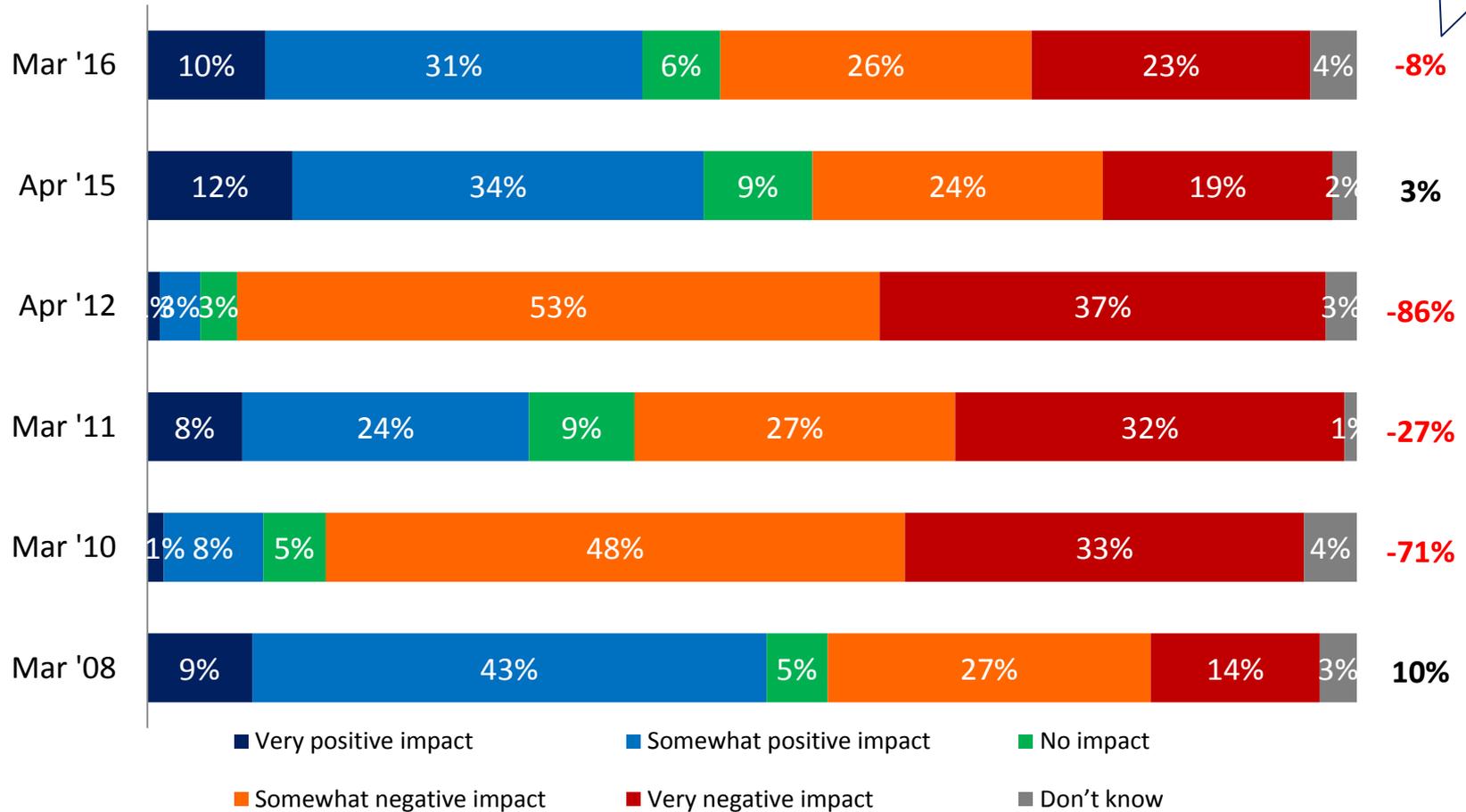
Impact: 11 point decrease in net impact from Apr 2015, resulting in net negative impact



[IF YES] Would that be a positive or a negative impact?

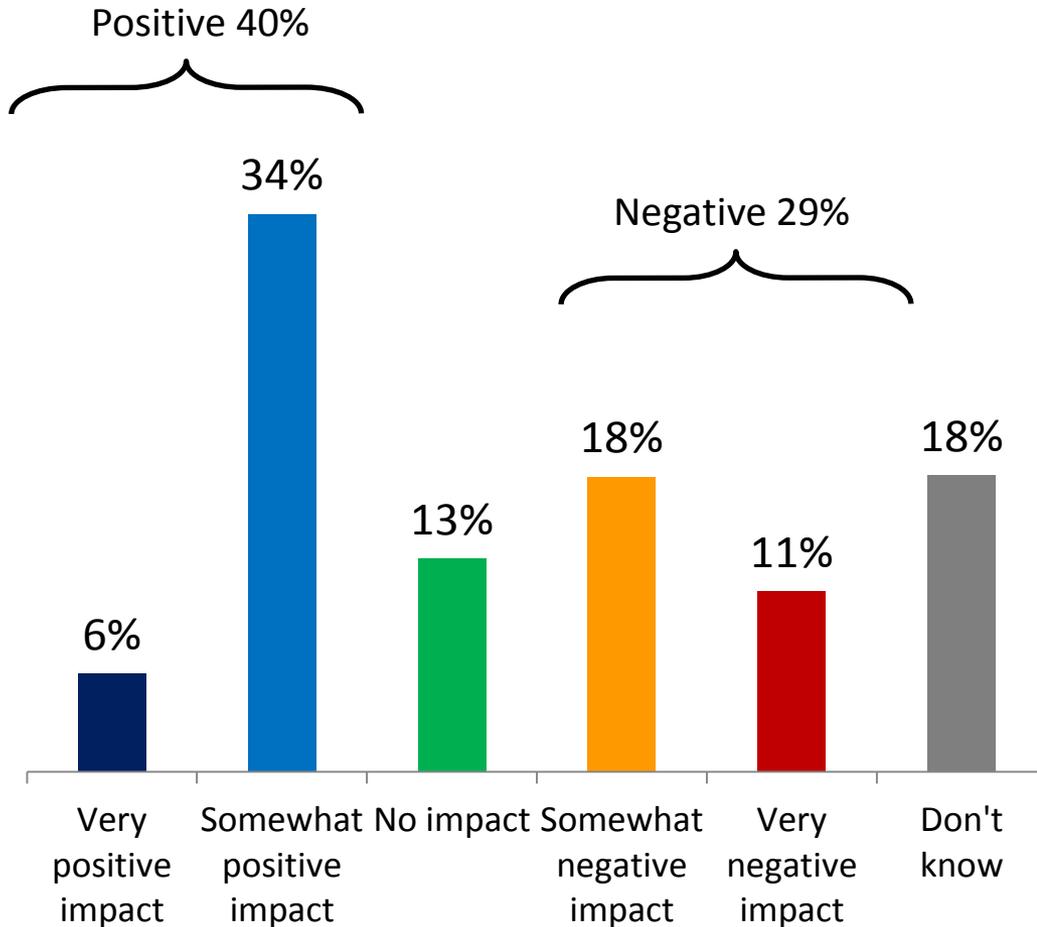
[asked of those who feel they would be impacted]

Net
Impact



Impact on Economy: 4-in-10 expect a positive impact on the economy; Conservatives least likely to be optimistic⁵²

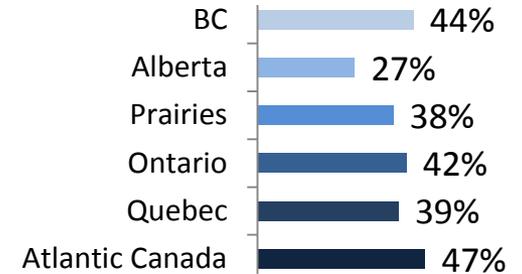
Q Do you think the budget will have a positive or negative impact on the economy?
[asked of all respondents]



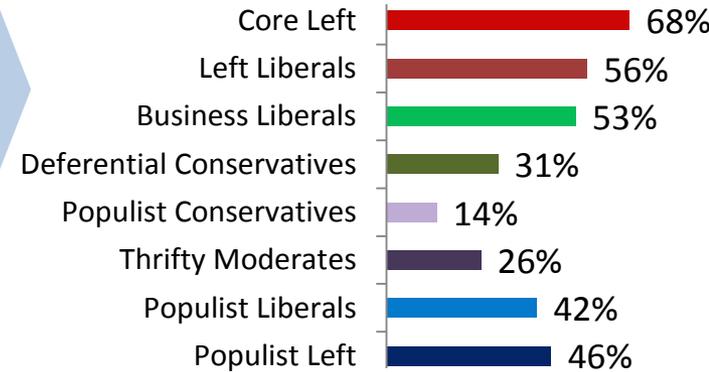
Sample Breakdown ▶▶

Those who say "positive"

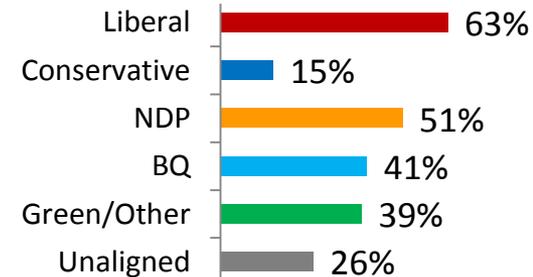
Region



Value Cluster

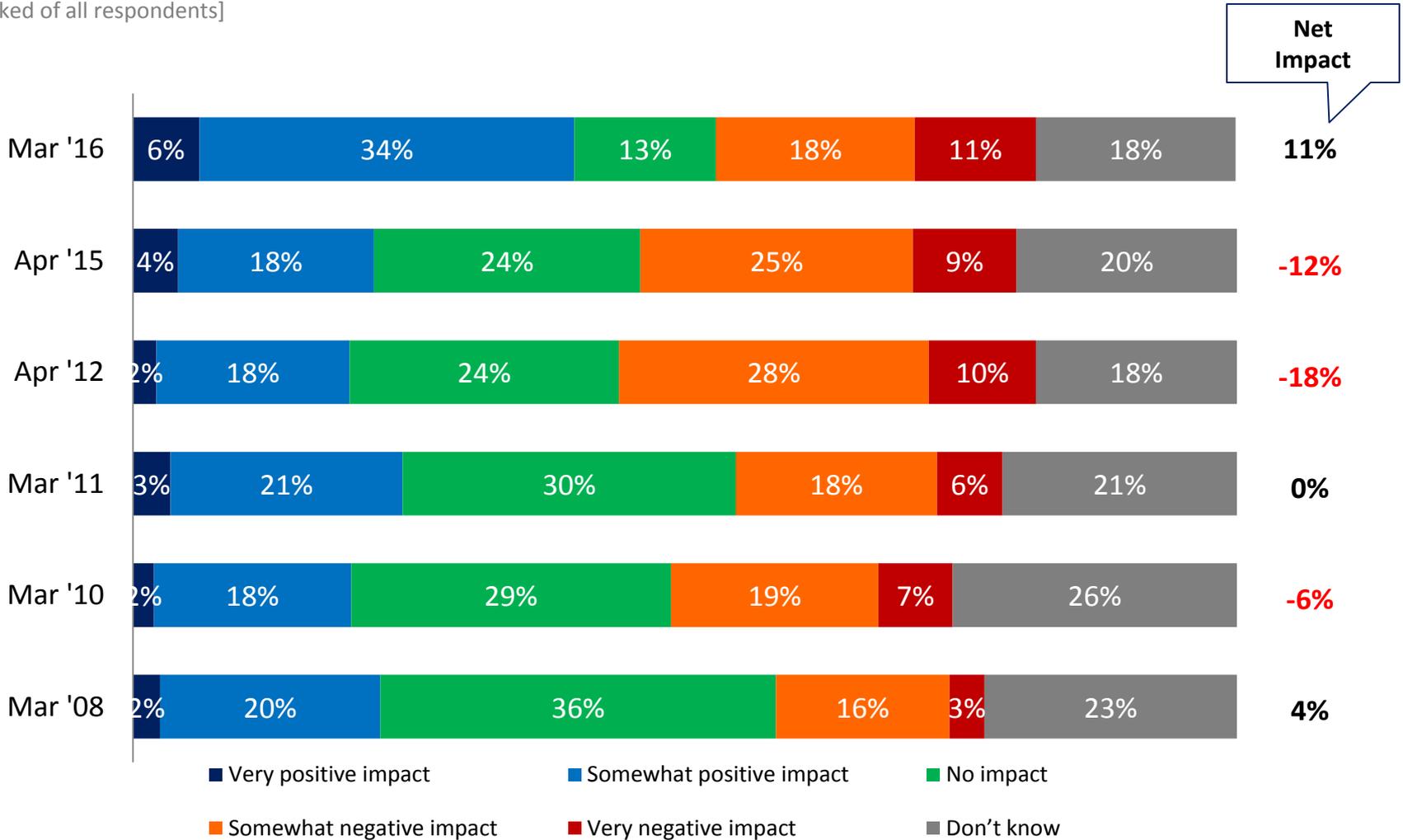


Party ID



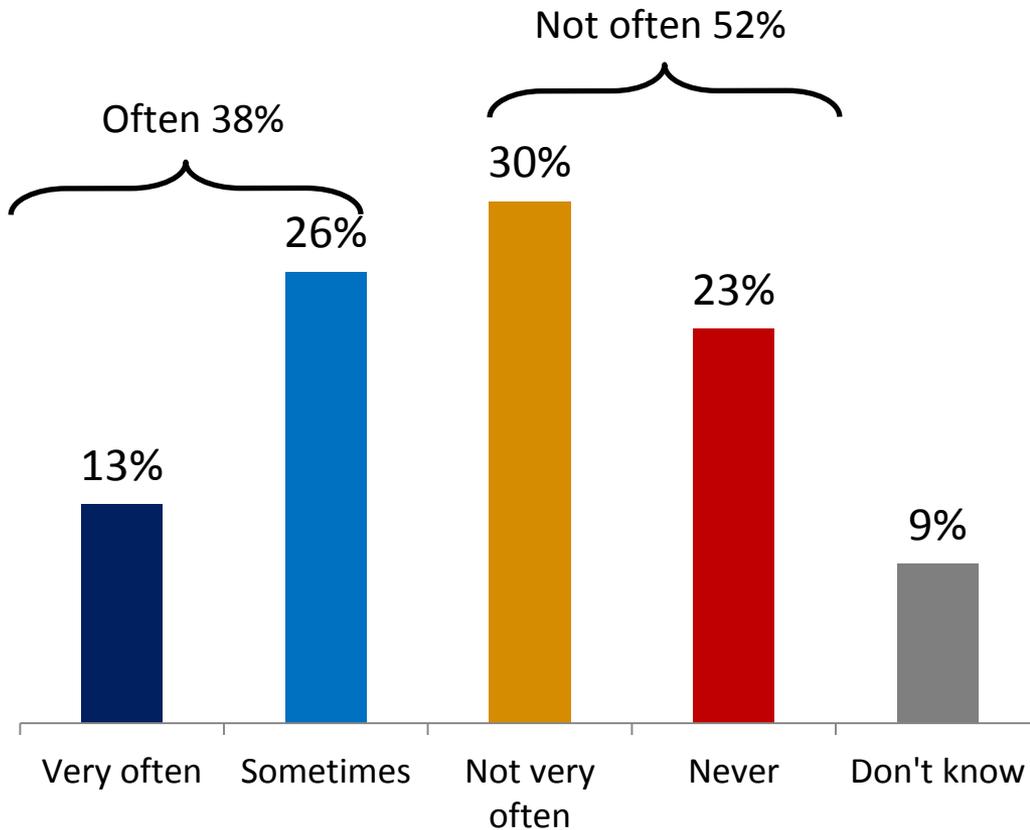
Impact on Economy: anticipated impact on economy significantly more positive than previous budgets

Q Do you think the budget will have a positive or negative impact on the economy?
[asked of all respondents]



Anxiety about budget: anxiety over the budget is highest in Alberta and among Conservatives ⁵⁴

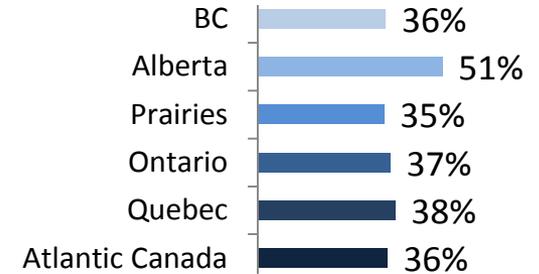
Q When you think about the new federal budget, how often have you felt **anxious?**
[asked of all respondents]



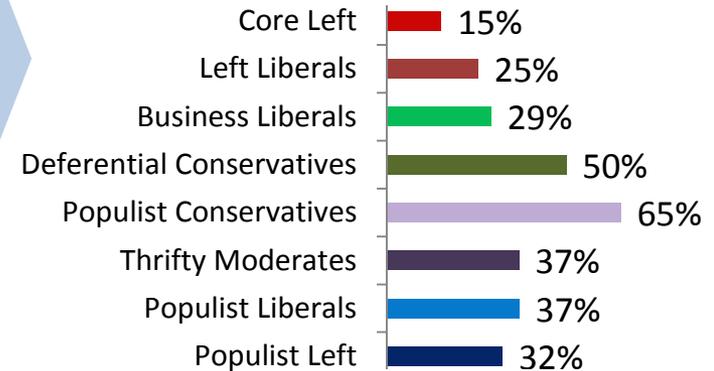
Sample Breakdown ▶▶

Those who say "often"

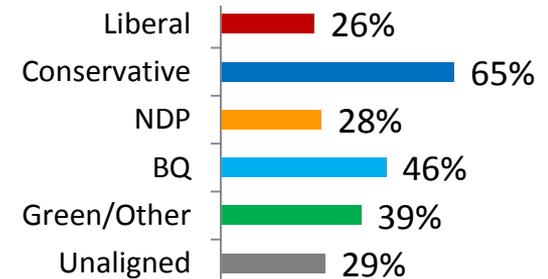
Region



Value Cluster

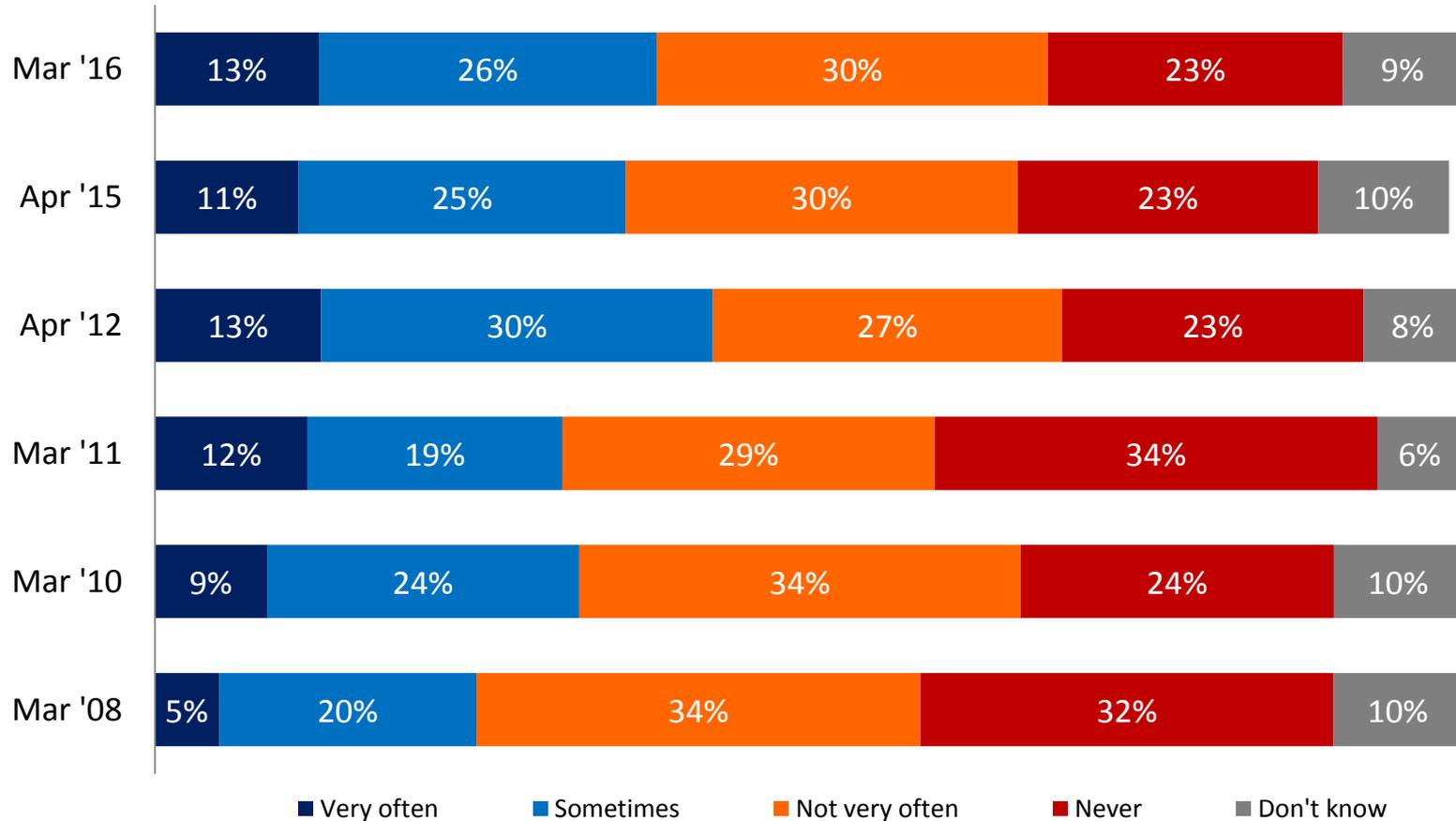


Party ID



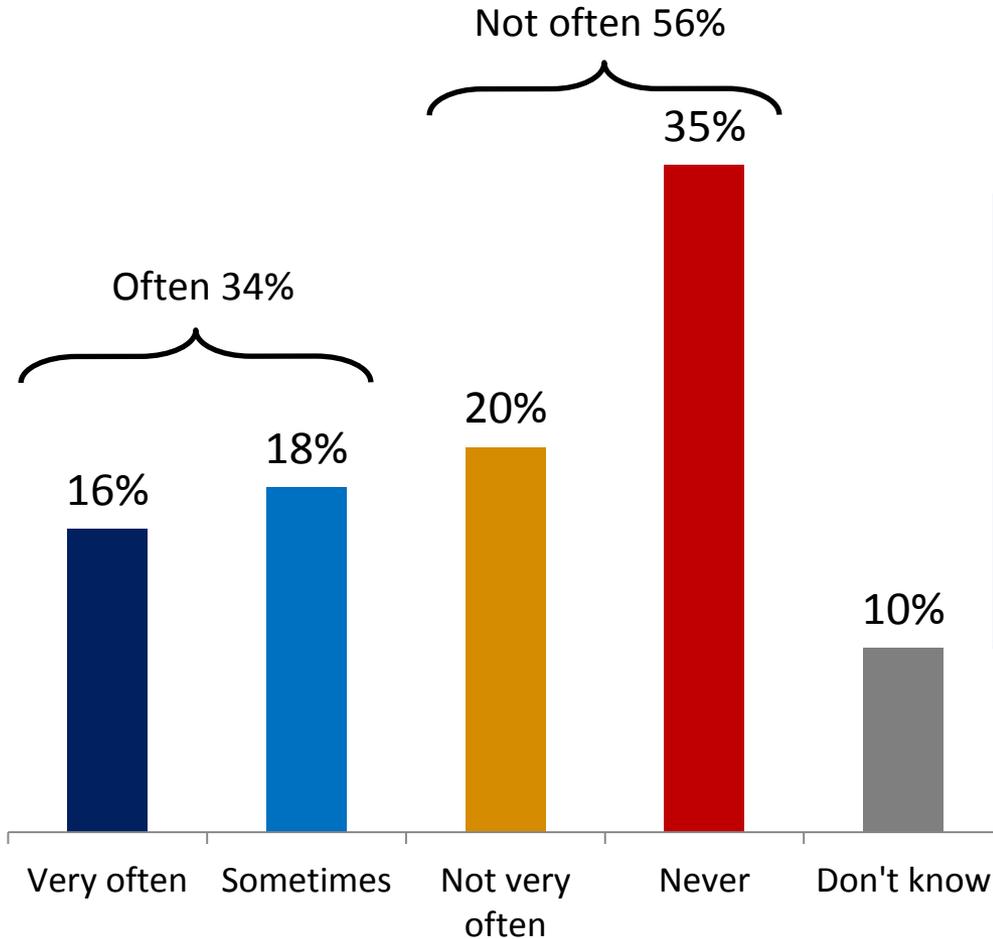
Anxiety about budget: level of anxiety marginally higher than for the 2015 Conservative budget

Q When you think about the new federal budget, how often have you felt **anxious**?
[asked of all respondents]



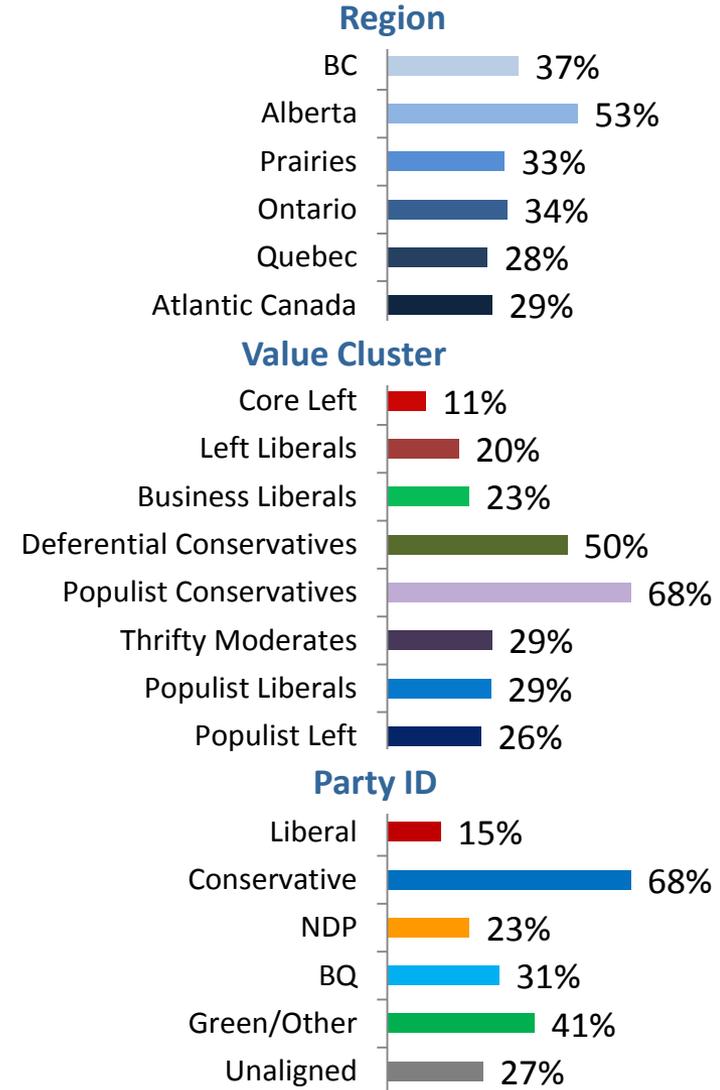
Anger about budget: a third often feel angry about the new budget; highest among CPCs and Populist Conservatives ⁵⁶

Q When you think about the new federal budget, how often have you felt angry?
 [asked of all respondents]



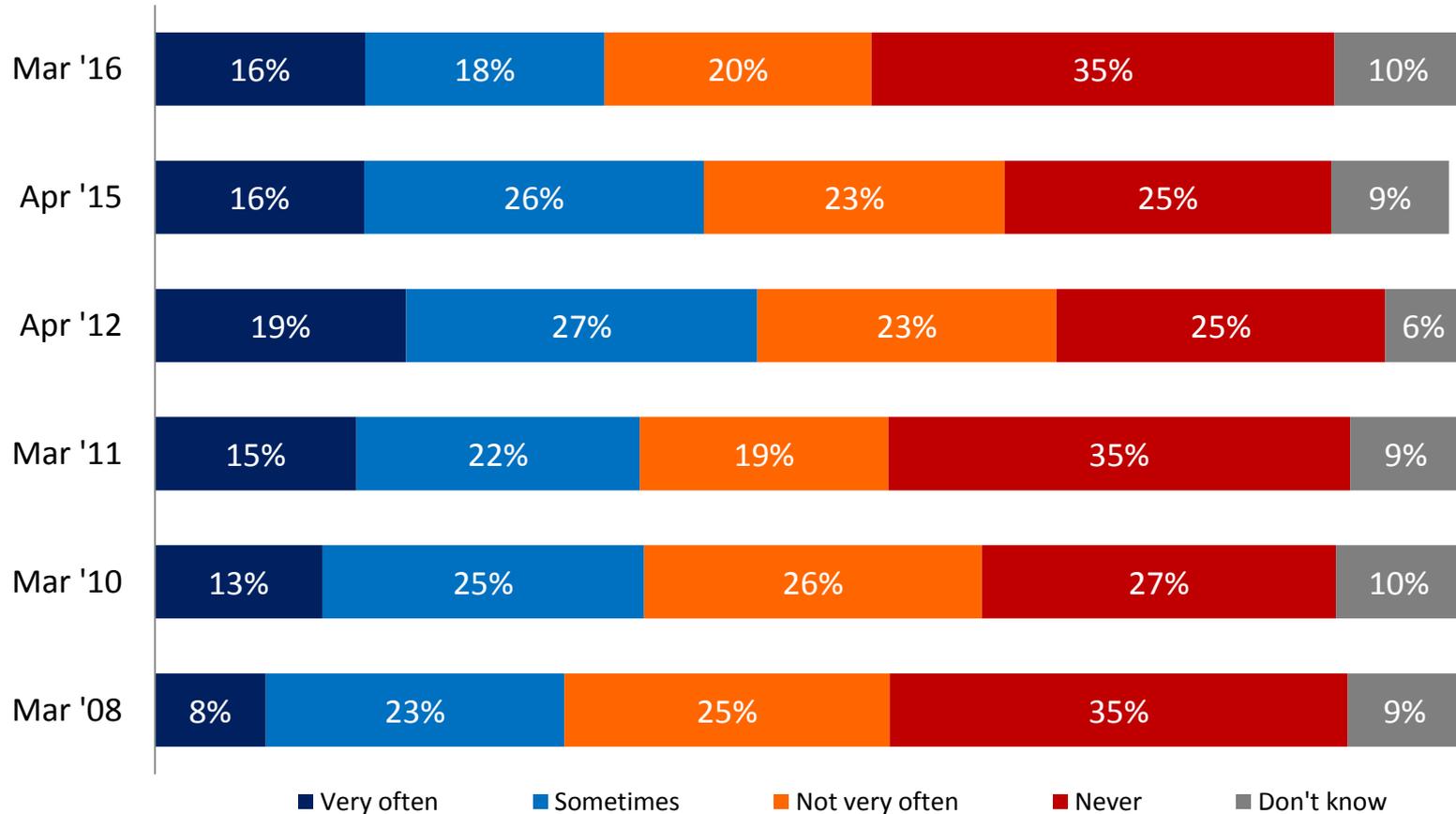
Sample Breakdown ▶▶

Those who say "often"



Anger about budget: level of anger significantly lower than for 2015 Conservative budget

Q When you think about the new federal budget, how often have you felt **angry**?
[asked of all respondents]

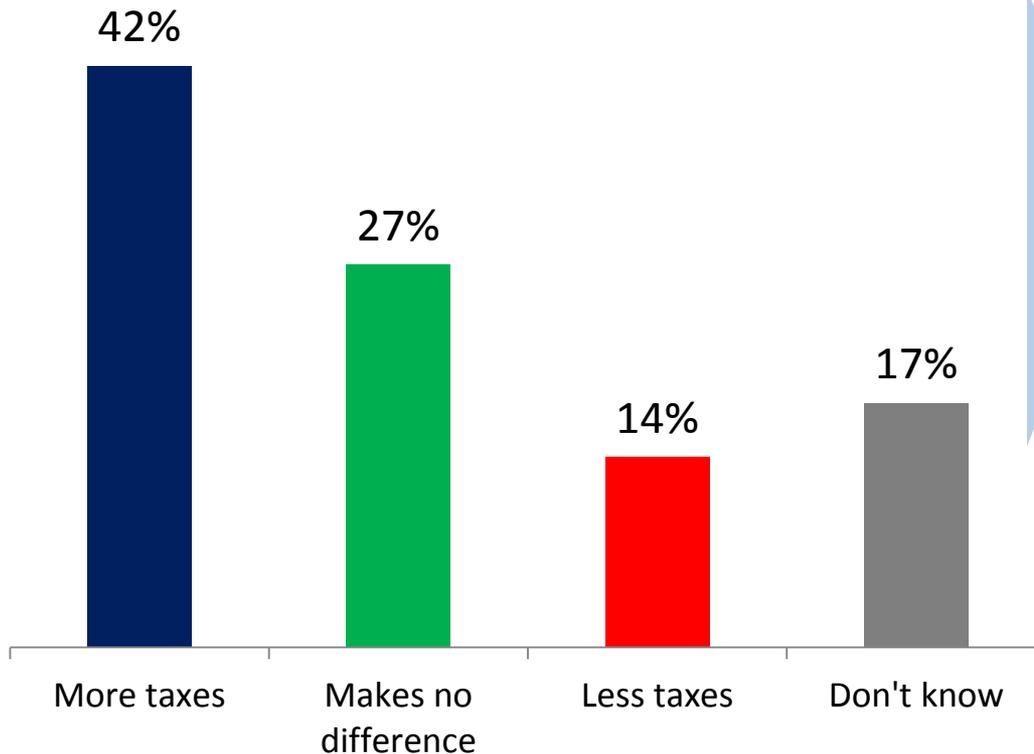


Impact on Taxes: 4-in-10 think the budget will result in more taxes; highest among CPC and Populist Conservatives



Do you think the budget will result in you paying more taxes, less taxes, or will it make no difference?

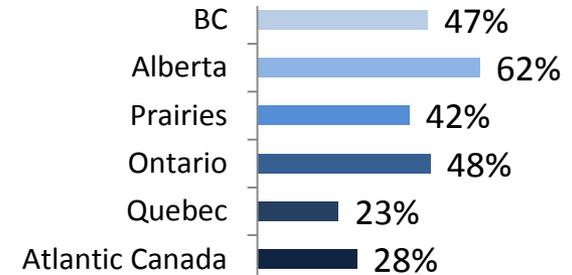
[asked of all respondents]



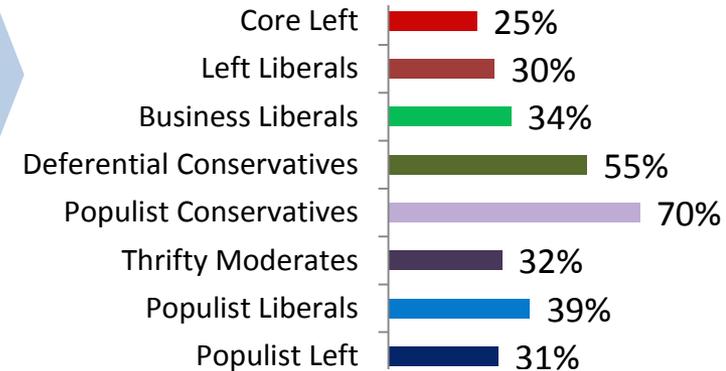
Sample Breakdown ▶▶

Those who say "more taxes"

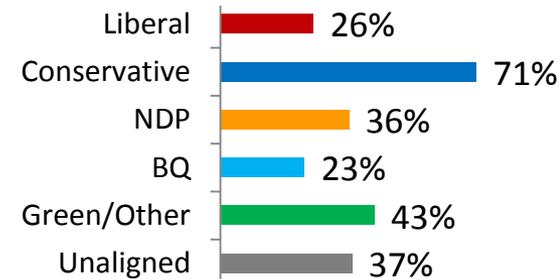
Region



Value Cluster



Party ID

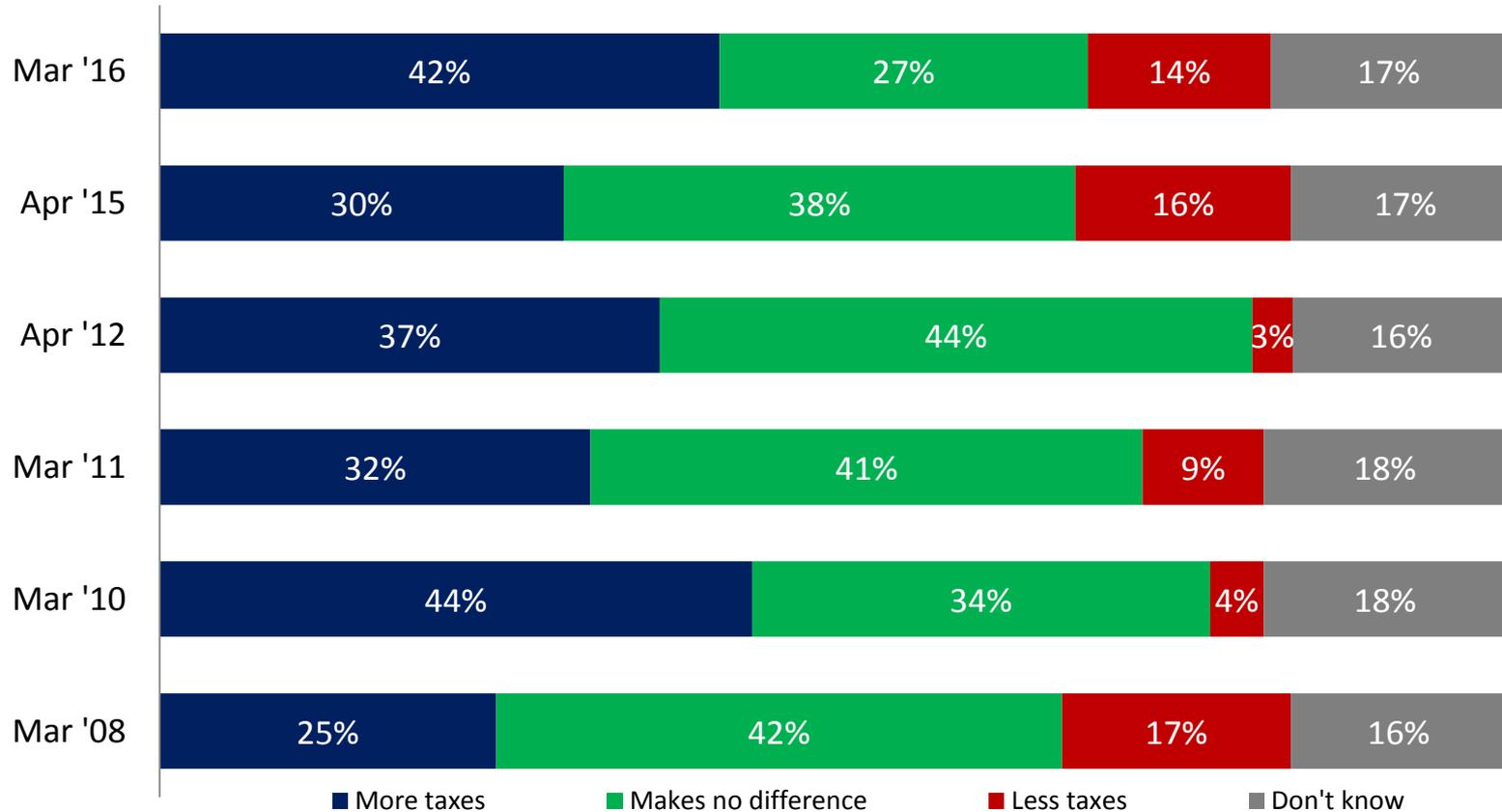


Impact on Taxes: more think the budget will result in paying more taxes than in previous three studies



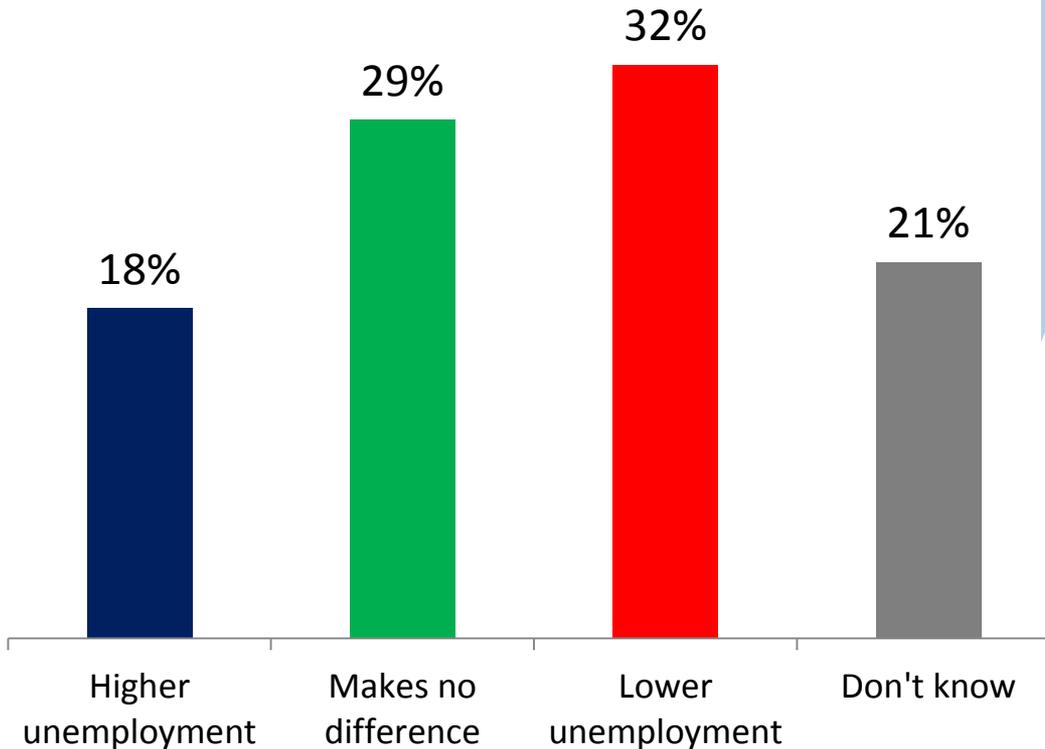
Do you think the budget will result in you paying more taxes, less taxes, or will it make no difference?

[asked of all respondents]



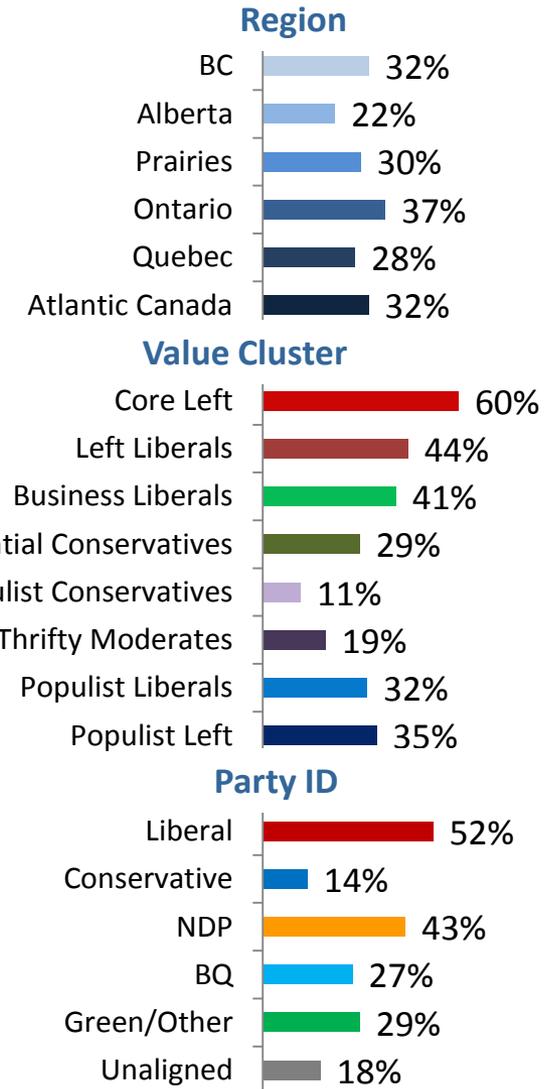
Impact on Unemployment: one third expect lower unemployment; highest among Core Left and Liberals

Q Do you think the budget will result higher levels of unemployment, lower levels of unemployment, or will it make no difference?
[asked of all respondents]



Sample Breakdown ▶▶

Those who say "lower unemployment"

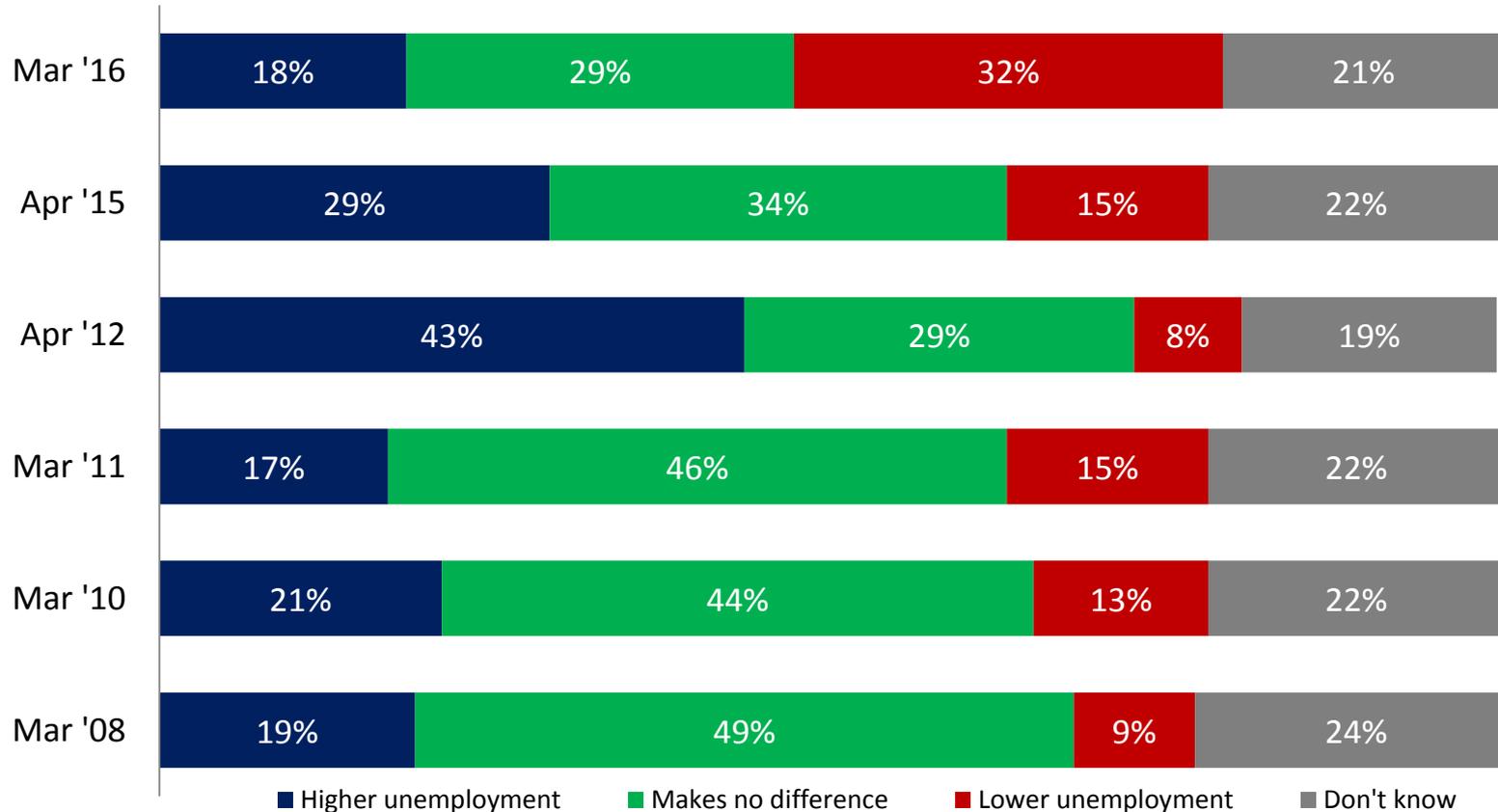


Impact on Unemployment: more think the budget will result in lower unemployment, highest since tracking began



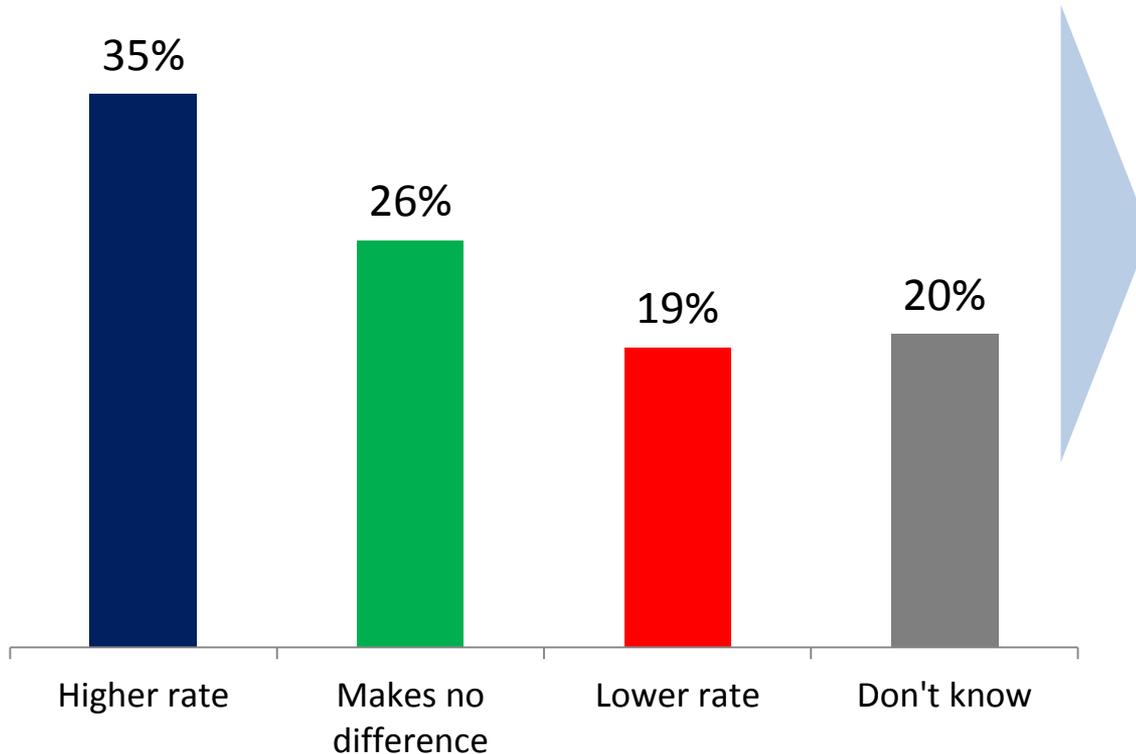
Do you think the budget will result higher levels of unemployment, lower levels of unemployment, or will it make no difference?

[asked of all respondents]



Impact on Economic Growth: more than 1-in-3 anticipate higher rate of economic growth; highest among Core Left

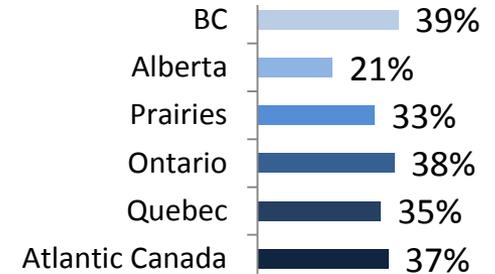
Q Do you think the budget will result a higher rate of economic growth in Canada, a lower rate of economic growth in Canada or will it make no difference?
[asked of all respondents]



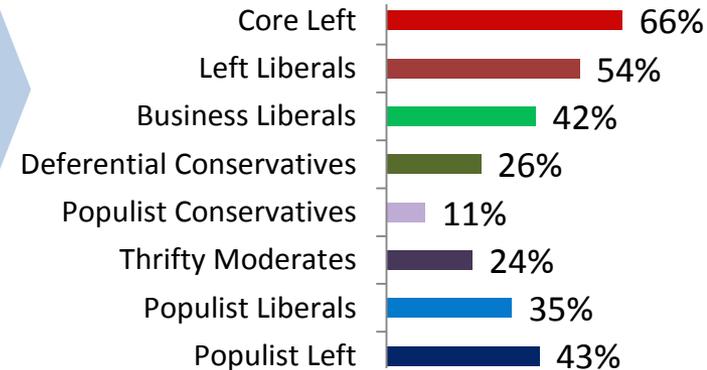
Sample Breakdown ▶▶

Those who say "higher rate"

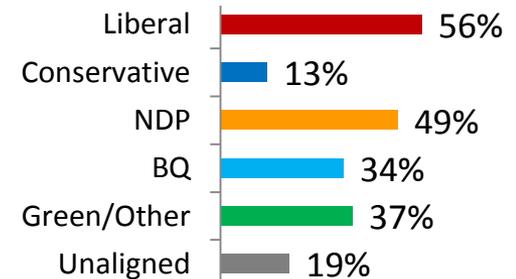
Region



Value Cluster

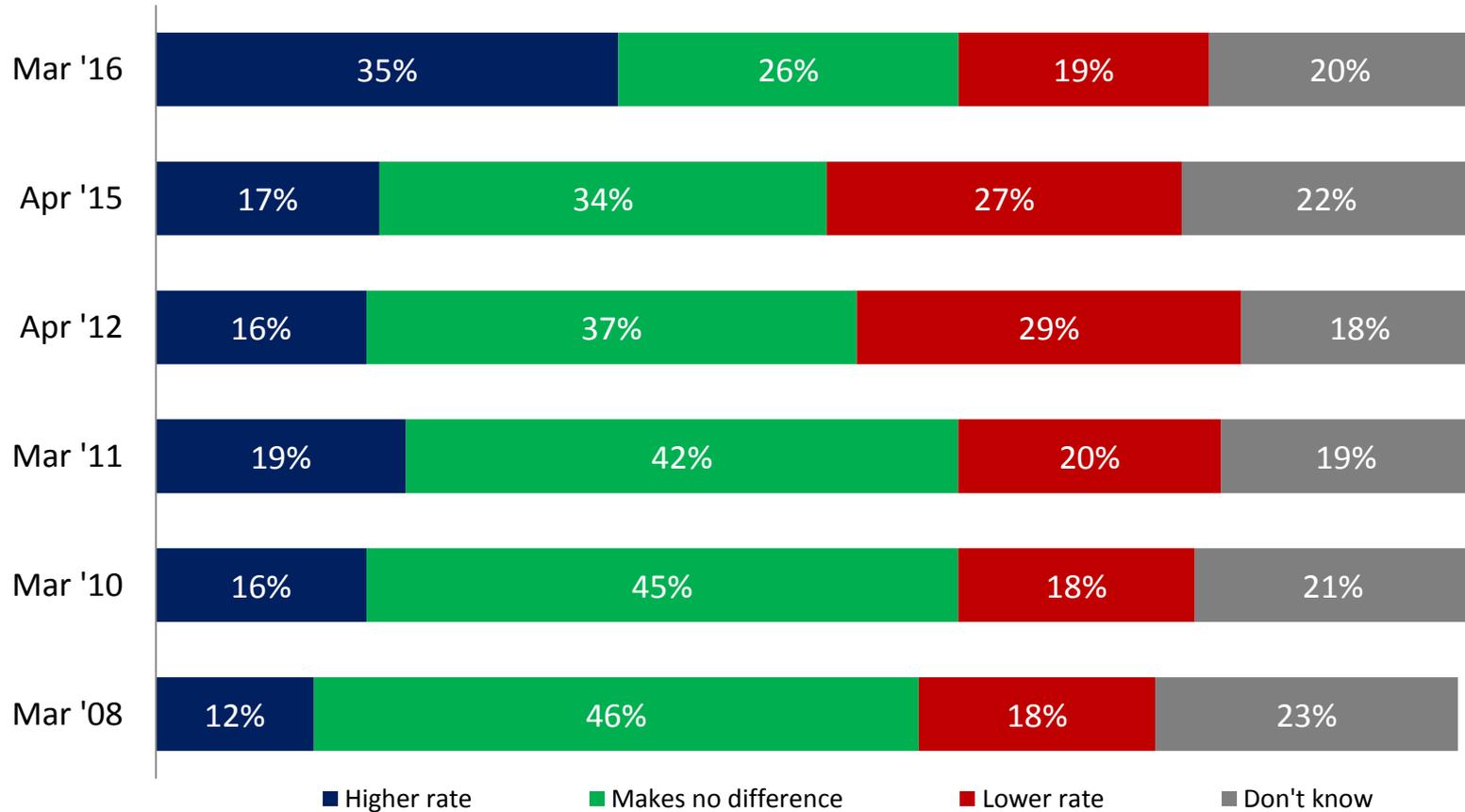


Party ID



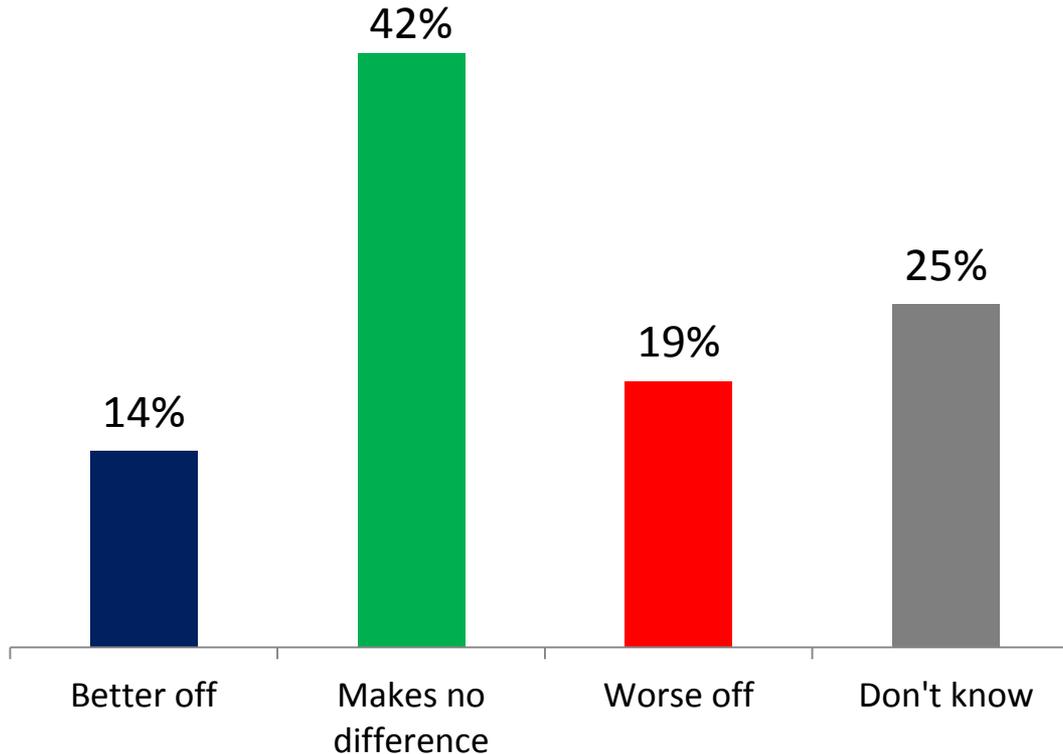
Impact on Economic Growth: more think the budget will result in higher rate of growth, highest since tracking began

Q Do you think the budget will result a higher rate of economic growth in Canada, a lower rate of economic growth in Canada or will it make no difference?
[asked of all respondents]



Impact on Health care system: a plurality (42%) think the budget will make no difference to the health care system

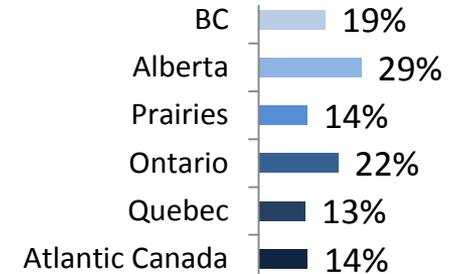
Q Do you think the budget will leave the Canadian health care system better off, worse off or will it make no difference?
[asked of all respondents]



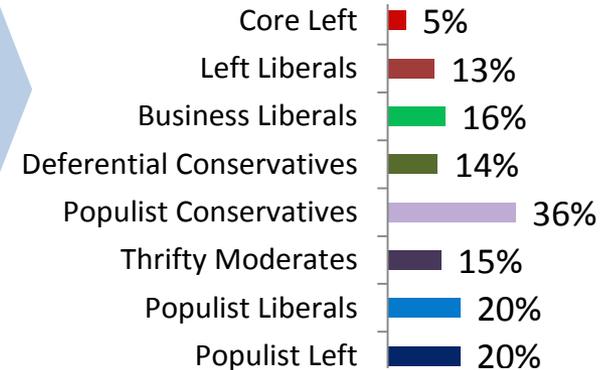
Sample Breakdown ▶▶

Those who say "worse off"

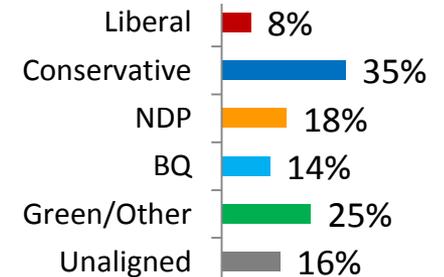
Region



Value Cluster

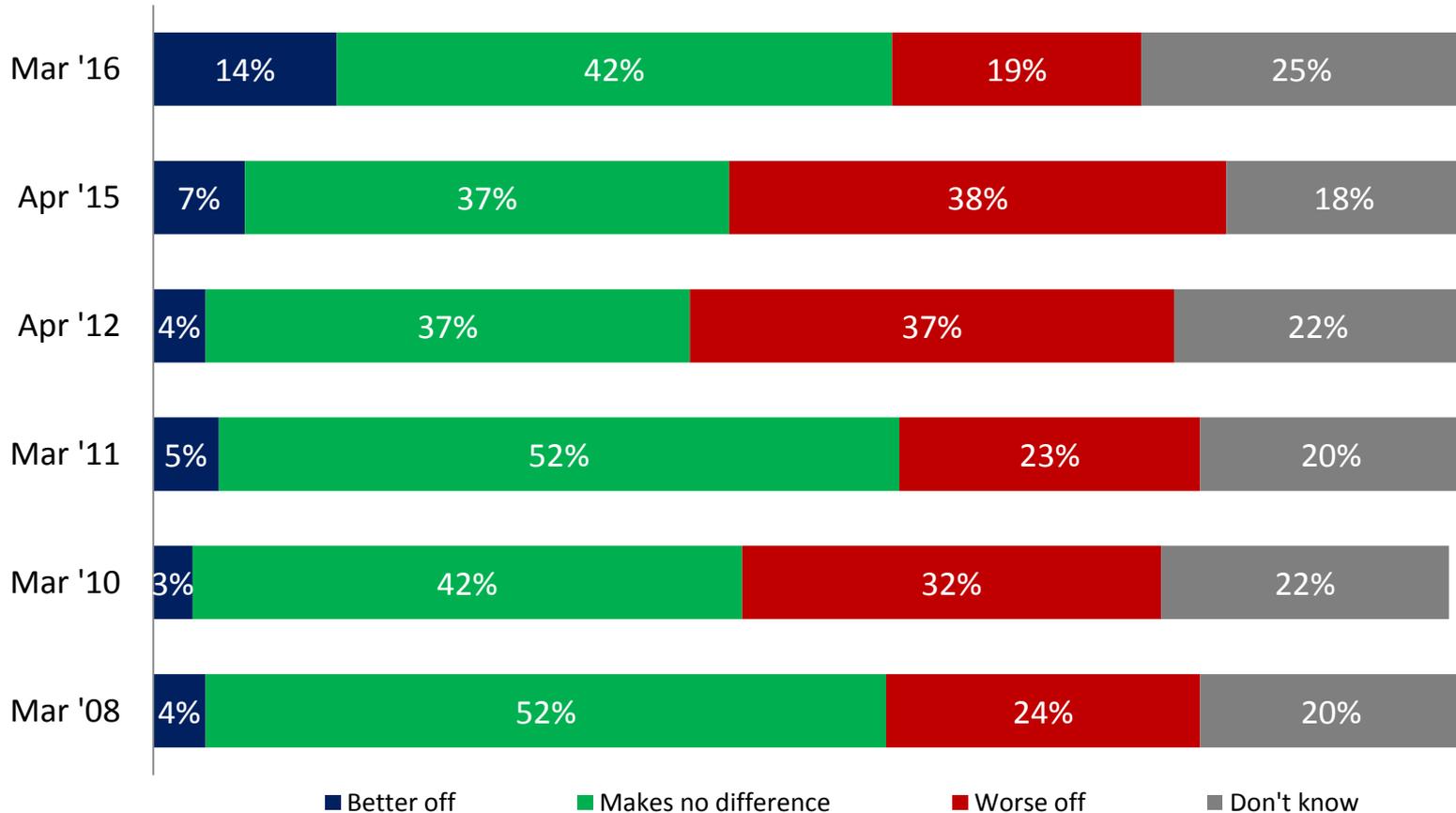


Party ID



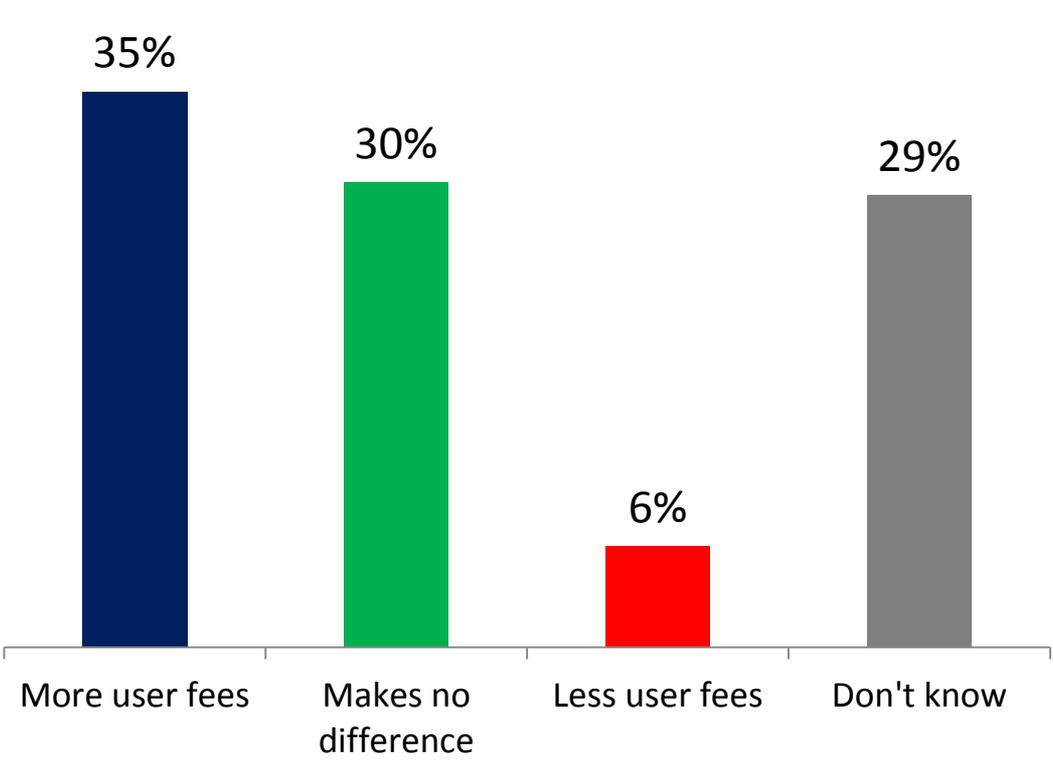
Impact on Health care system: smallest % of those who feel budget will leave the system worse off since tracking began⁶⁵

Q Do you think the budget will leave the Canadian health care system better off, worse off or will it make no difference?
[asked of all respondents]



Impact on User fees: more think budget will result in more user fees; highest among CPC and Populist Conservatives

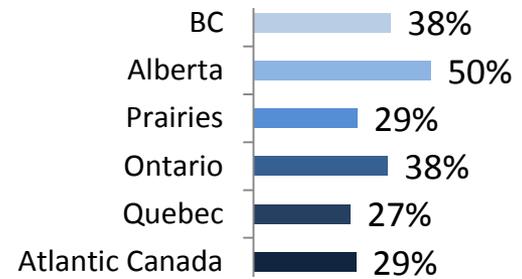
Q Do you think the budget will result in you paying more user fees for government services, less user fees for government services or will it make no difference?
[asked of all respondents]



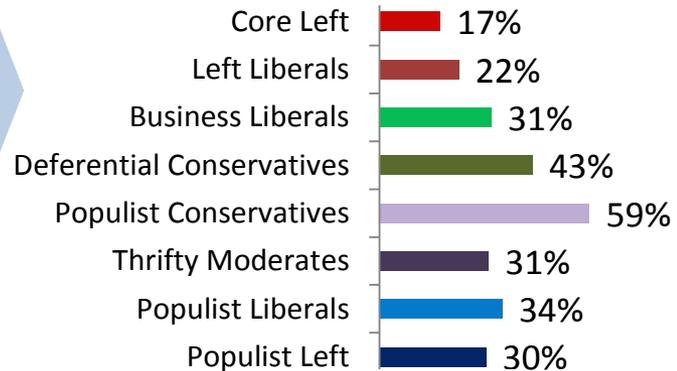
Sample Breakdown ▶▶

Those who say "more user fees"

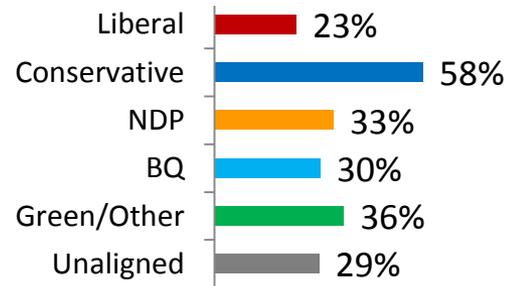
Region



Value Cluster

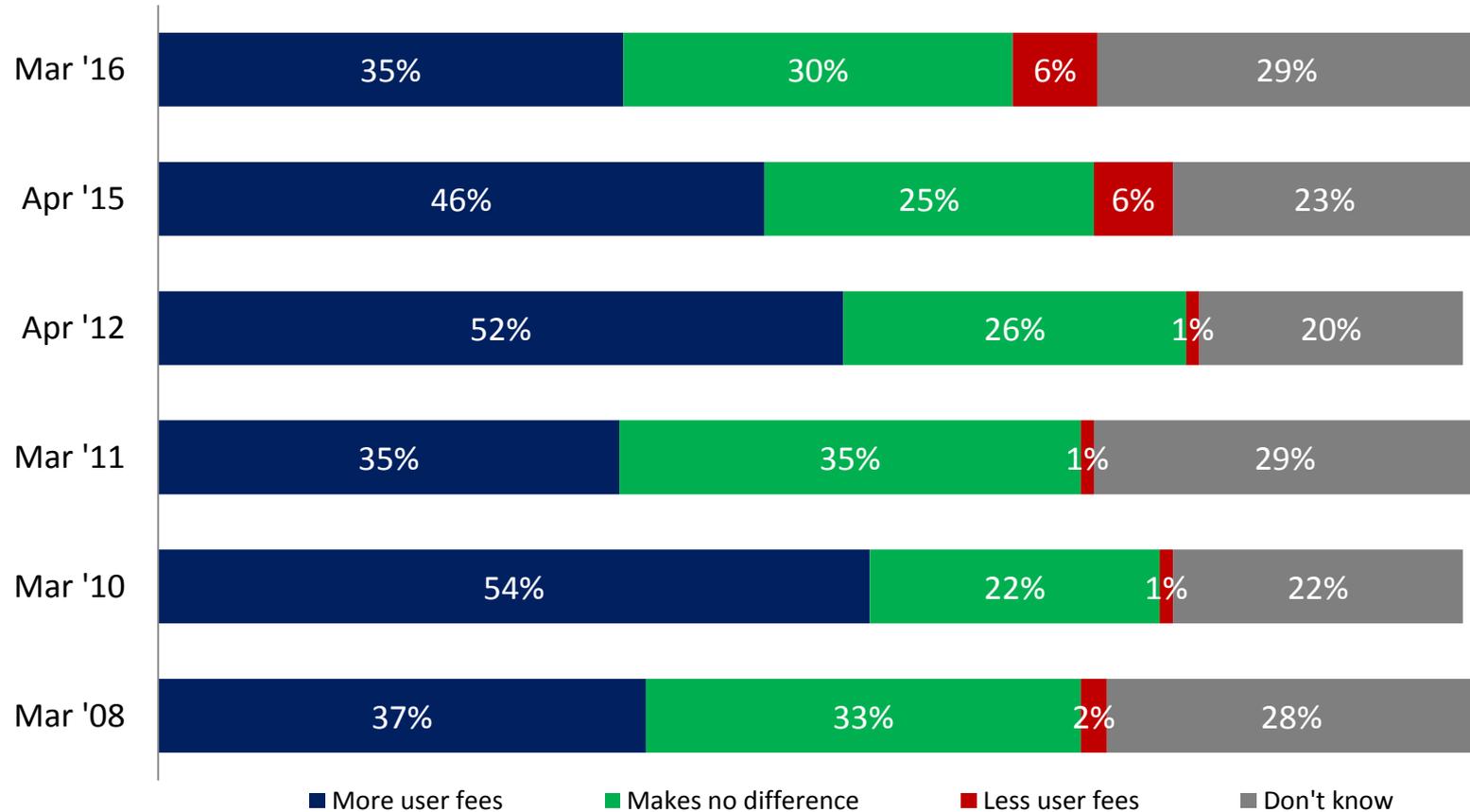


Party ID



Impact on User fees: smallest % of those who feel the budget will result in paying more user fees since March 2011

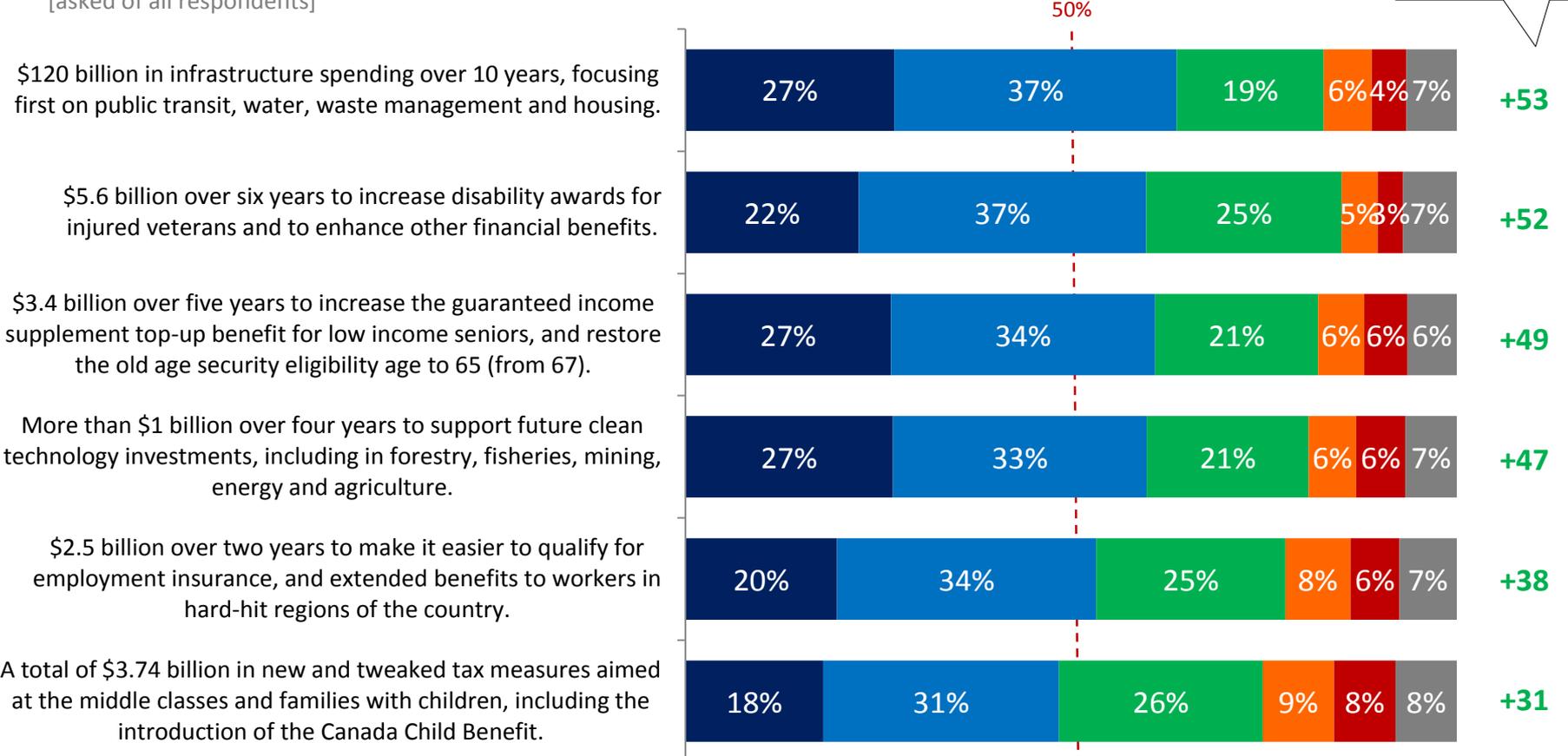
Q Do you think the budget will result in you paying more user fees for government services, less user fees for government services or will it make no difference?
[asked of all respondents]



Agreement with Statements about Budget: high favourability towards infrastructure spending and veteran disability awards

Q Below is a list of some of the announcements made in the new federal budget. For each one, I'd like you to indicate whether it leaves you feeling more or less favourable toward the Federal Liberal Government, or if it has no impact.
 [asked of all respondents]

Net Favourability

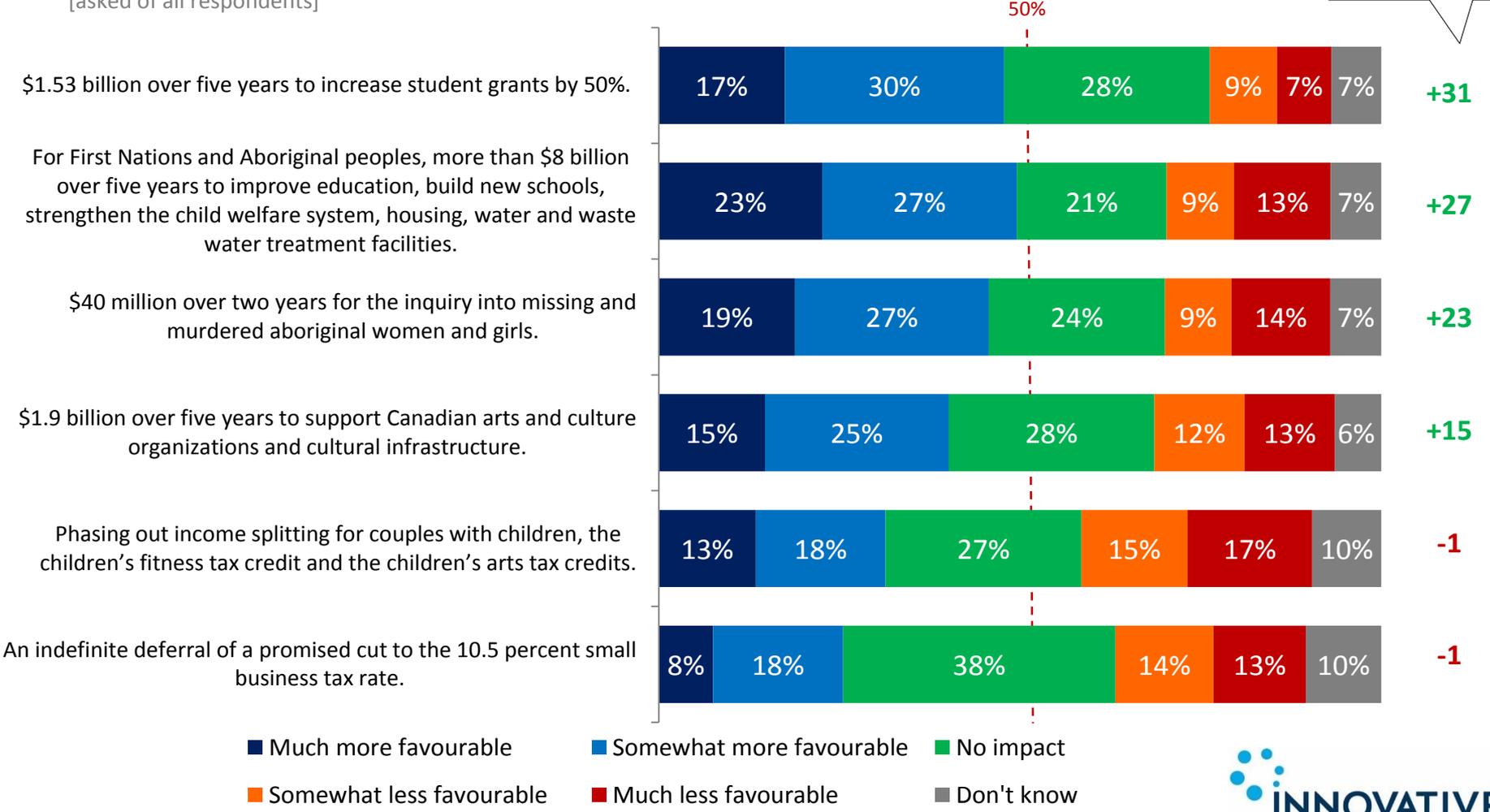


■ Much more favourable
 ■ Somewhat more favourable
 ■ No impact
■ Somewhat less favourable
 ■ Much less favourable
 ■ Don't know

Agreement with Statements about Budget: low favourability⁶⁹ towards phasing out income splitting and deferring tax cut

Q Below is a list of some of the announcements made in the new federal budget. For each one, I'd like you to indicate whether it leaves you feeling more or less favourable toward the Federal Liberal Government, or if it has no impact.
 [asked of all respondents]

Net Favourability



■ Much more favourable
 ■ Somewhat more favourable
 ■ No impact
■ Somewhat less favourable
 ■ Much less favourable
 ■ Don't know

Net Favourability of Statements about Budget by Value Cluster

Value Clusters

<i>Net Favourability</i>	Core Left	Left Liberals	Business Liberals	Deferential Conservatives	Populist Conservatives	Thrifty Moderates	Populist Liberals	Populist Left
\$120 billion in infrastructure spending over 10 years, focusing first on public transit, water, waste management and housing.	+88	+85	+68	+44	+6	+39	+61	+67
\$5.6 billion over six years to increase disability awards for injured veterans and to enhance other financial benefits.	+67	+67	+57	+47	+41	+31	+56	+59
\$3.4 billion over five years to increase the guaranteed income supplement top-up benefit for low income seniors, and restore the old age security eligibility age to 65 (from 67).	+72	+69	+62	+21	+8	+43	+64	+82
More than \$1 billion over four years to support future clean technology investments, including in forestry, fisheries, mining, energy and agriculture.	+87	+74	+63	+37	-5	+37	+60	+59
\$2.5 billion over two years to make it easier to qualify for employment insurance, and extended benefits to workers in hard-hit regions of the country.	+72	+56	+54	+14	+2	+28	+46	+57
A total of \$3.74 billion in new and tweaked tax measures aimed at the middle classes and families with children, including the introduction of the Canada Child Benefit.	+64	+58	+47	+8	-16	+26	+39	+54

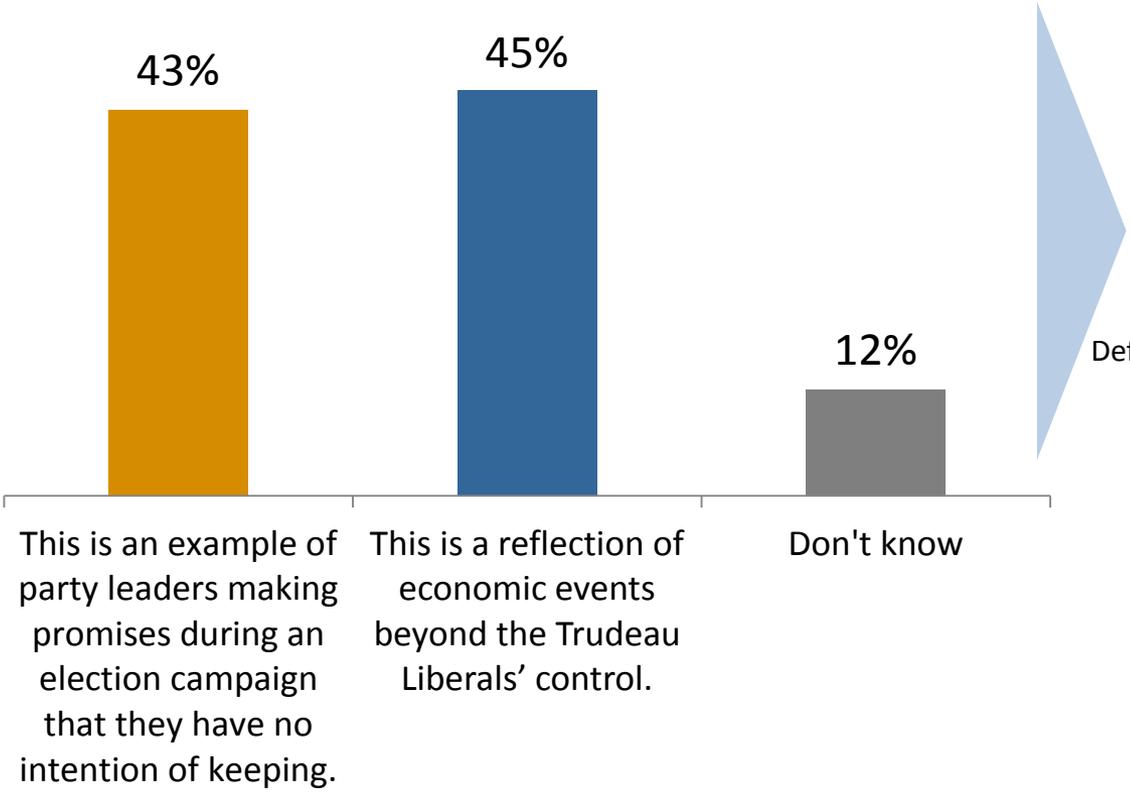
Net Favourability of Statements about Budget by Value Cluster

Value Clusters

<i>Net Favourability</i>	Core Left	Left Liberals	Business Liberals	Deferential Conservatives	Populist Conservatives	Thrifty Moderates	Populist Liberals	Populist Left
\$1.53 billion over five years to increase student grants by 50%.	+68	+65	+43	+1	-18	+22	+46	+55
For First Nations and Aboriginal peoples, more than \$8 billion over five years to improve education, build new schools, strengthen the child welfare system, housing, water and waste water treatment facilities.	+80	+62	+38	-5	-33	+25	+35	+54
\$40 million over two years for the inquiry into missing and murdered aboriginal women and girls.	+77	+52	+35	-13	-35	+24	+31	+51
\$1.9 billion over five years to support Canadian arts and culture organizations and cultural infrastructure.	+72	+48	+27	-15	-45	+19	+22	+33
Phasing out income splitting for couples with children, the children's fitness tax credit and the children's arts tax credits.	+41	+17	+17	-32	-46	+13	-4	+14
An indefinite deferral of a promised cut to the 10.5 percent small business tax rate.	+26	+20	+10	-27	-42	+6	+11	+12

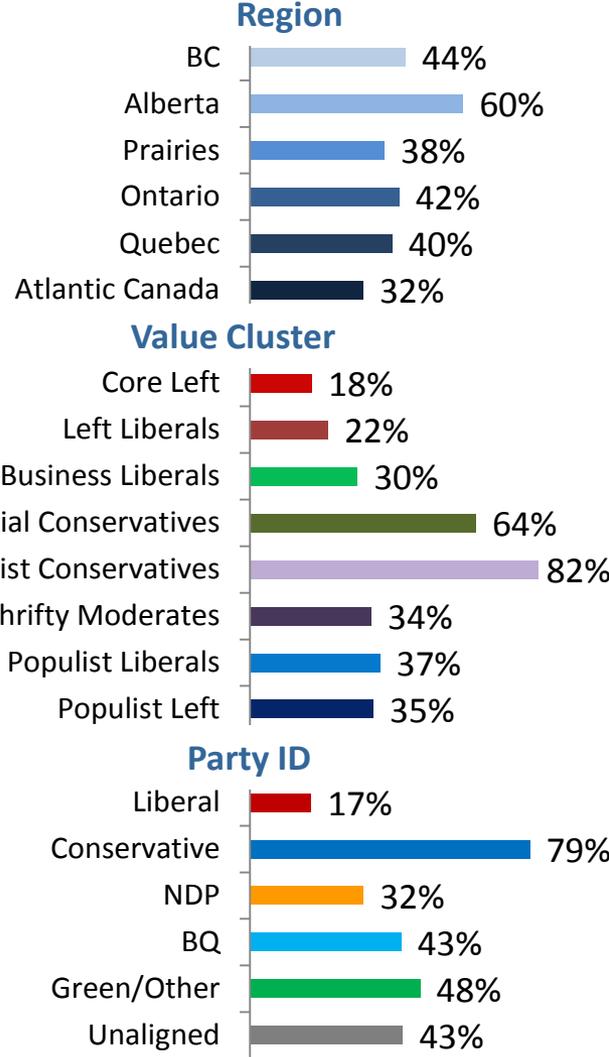
Reaction to Increased Deficit: roughly even split among the two given points of view

Q During the 2015 election campaign, Justin Trudeau made a promise to run deficits of no more than \$10 billion per year for three years before balancing the budget again. However, Finance Minister Bill Morneau announced in the new budget that the 2016-2017 deficit will be \$29.4 billion. With this in mind, which of the following statements is closest to your point of view?
 [asked of all respondents]



Sample Breakdown ▶▶

Those who say "making promises they have no intention of keeping"





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