

One Term Wonder?

The Chances for a Second Trudeau Government

Methodology

- These are the findings of an Innovative Research Group (INNOVATIVE) poll conducted from September 27th to October 1st, 2018.
- This online survey of 2,410 adult Canadians was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Leger Marketing, a leading provider of online sample. The results are weighted to n=1,200 based on Census data from Statistics Canada.
- Respondents from the Canada 20/20 Panel and the Leger Panel are recruited from a wide variety of sources to reflect the age, gender, region and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.
- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once.
- This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error can not be calculated. Statements about margins of sampling error or population estimates do not apply 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?

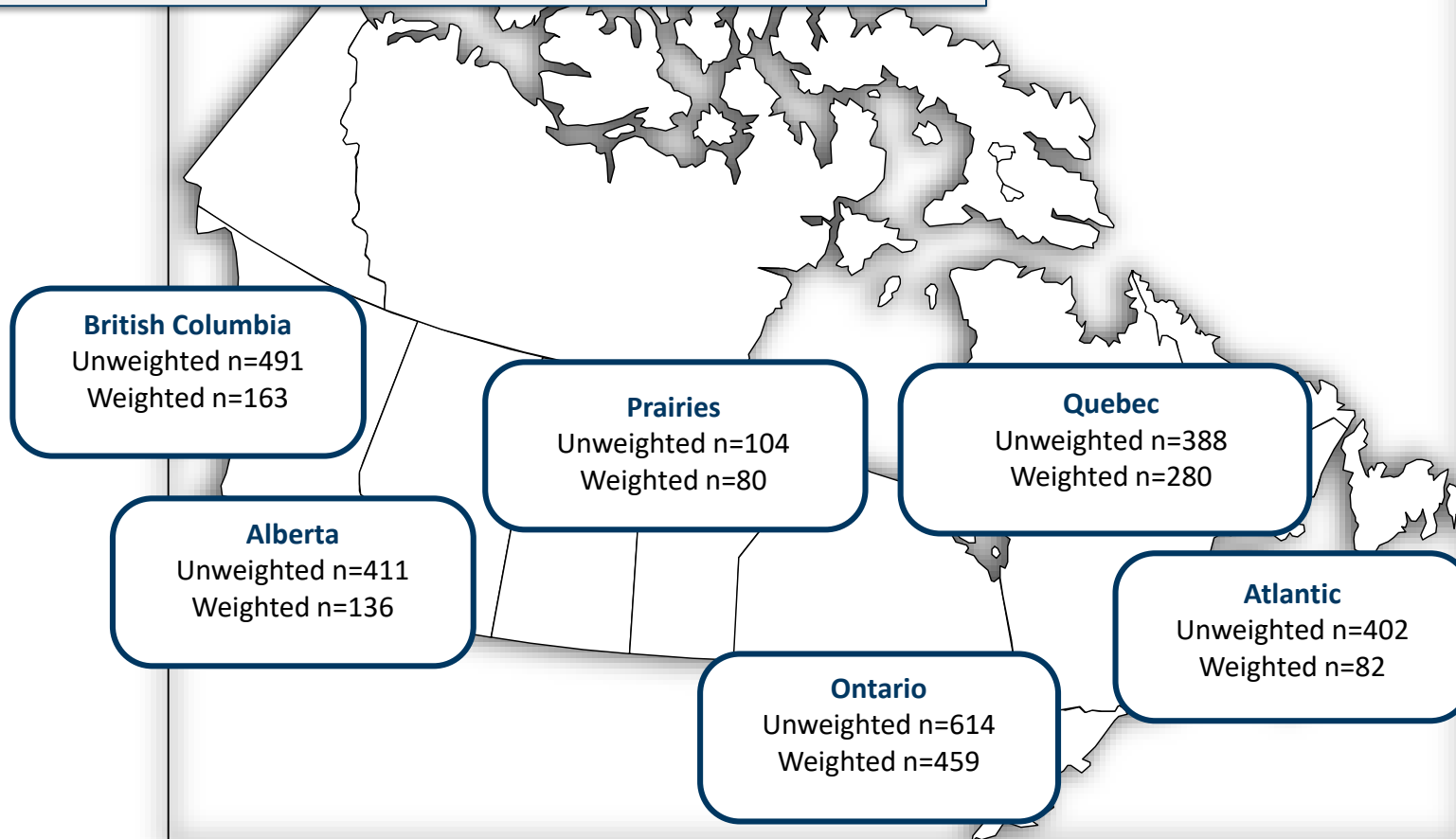
Regional groupings include:

- 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=2,410

Weighted n=1,200



Flash Back:

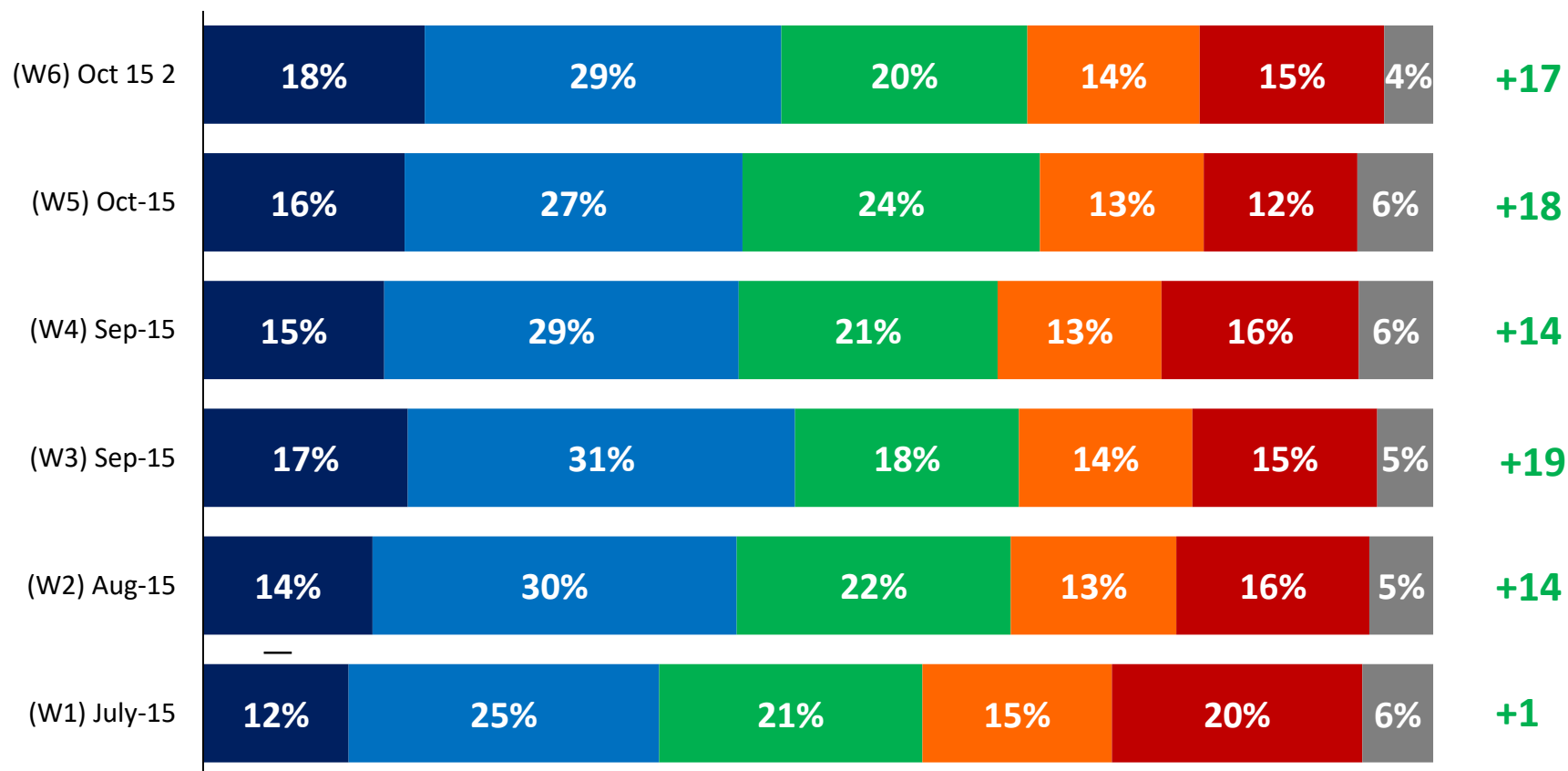
Key Factors in the last election

Leader Impressions: Trudeau's gains in reputation was the first sign of Liberal Momentum

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. **[Includes unfamiliar % from previous Q]**

Net Favourability



■ Strongly favourable

■ Somewhat favourable

■ Neutral/Neither favourable nor unfavourable

■ Somewhat unfavourable

■ Strongly unfavourable

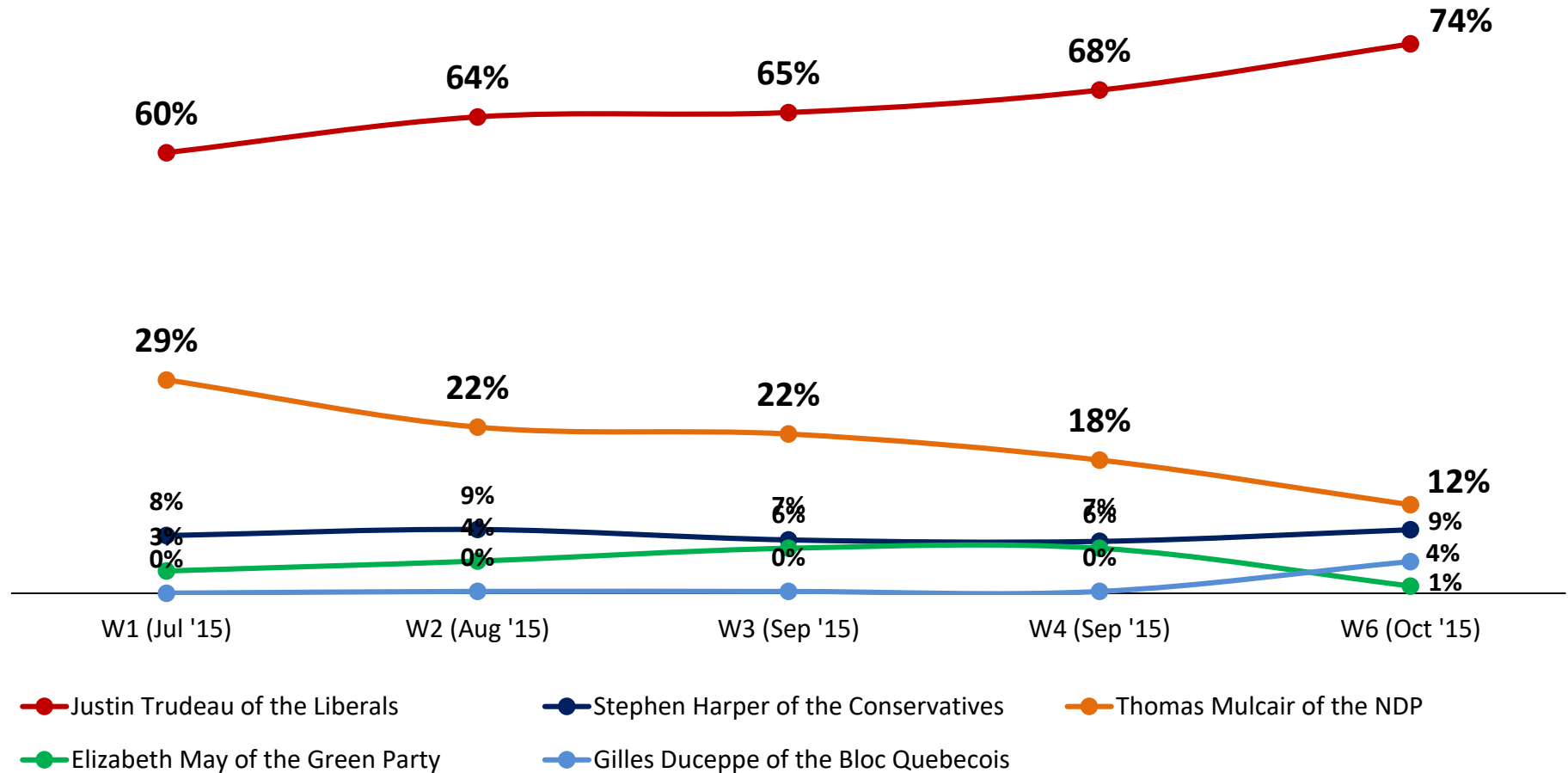
■ DK/Do not recognize

LPC Partisans: Trudeau up 14 points as best PM since pre-writ

6

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

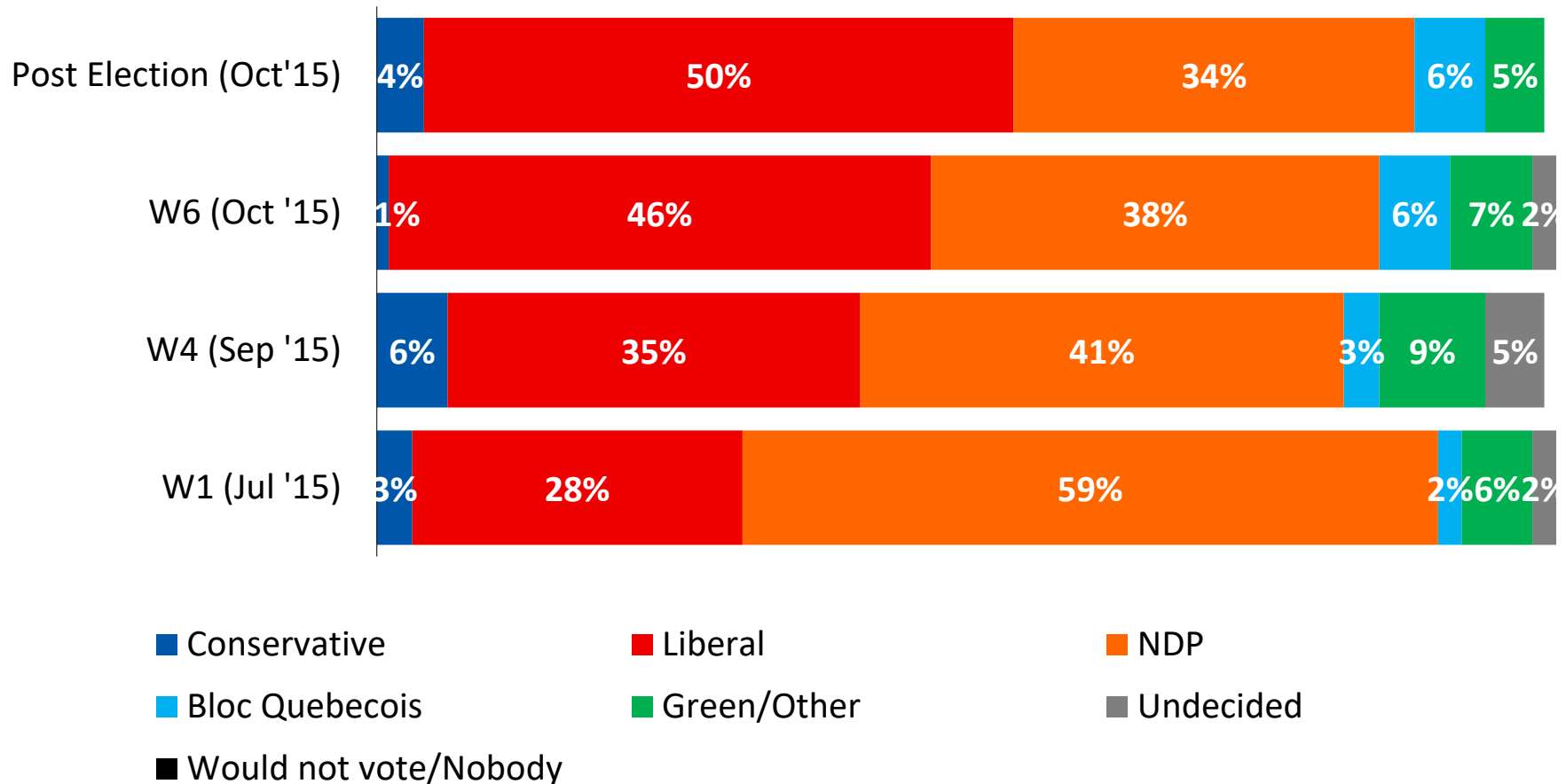
[LPC Partisans Only - Bloc Quebecois asked only in Quebec]



Note: 'None', 'Don't know', 'Refused' not shown.

Just like Wynne, left wingers rallied to a progressive Liberal agenda and abandoned a more prudent New Democrat

Vote Change among Core Left Voters



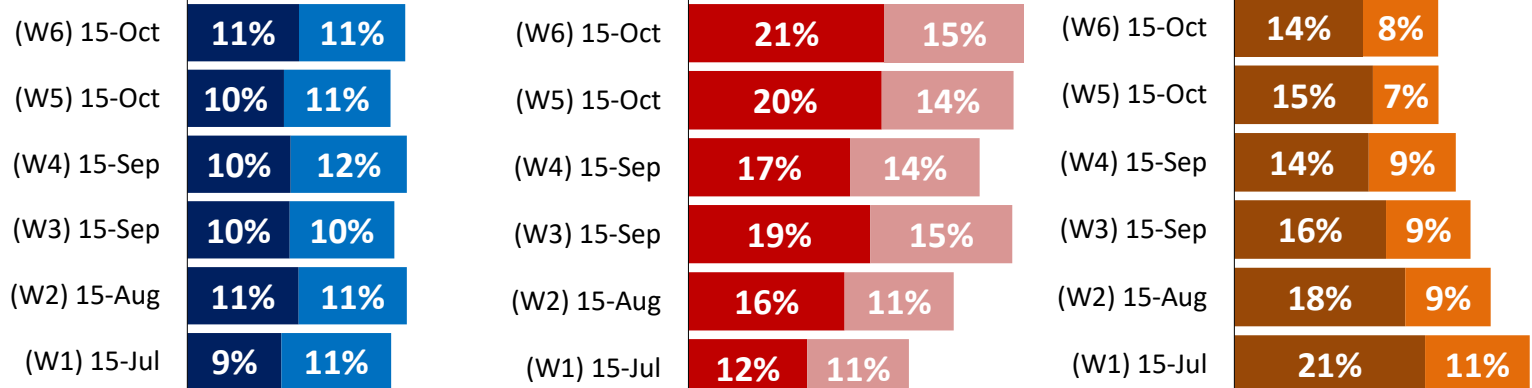
Party Attributes: Liberals became the party of the middle ⁸

class and job creation

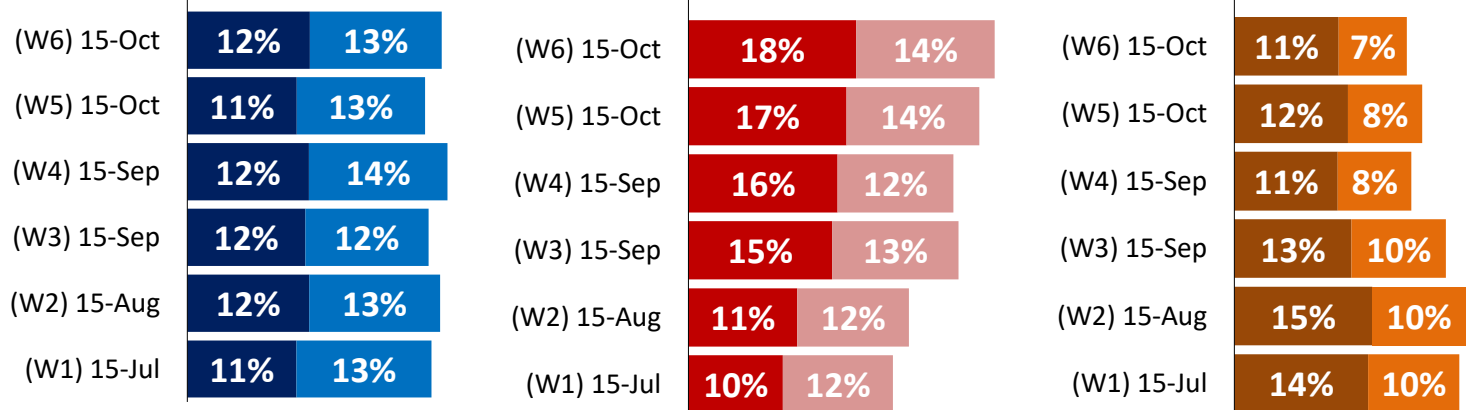
Q

Now we are going to provide you with a list of issues. For each of these issues, please tell me which party you think would do a much better job or a somewhat better job of dealing with that issue or if you think none of the parties would do a good job on that issue. How about...?

Protecting the middle class



Creating jobs



■ Conservative much better
■ Conservative somewhat better

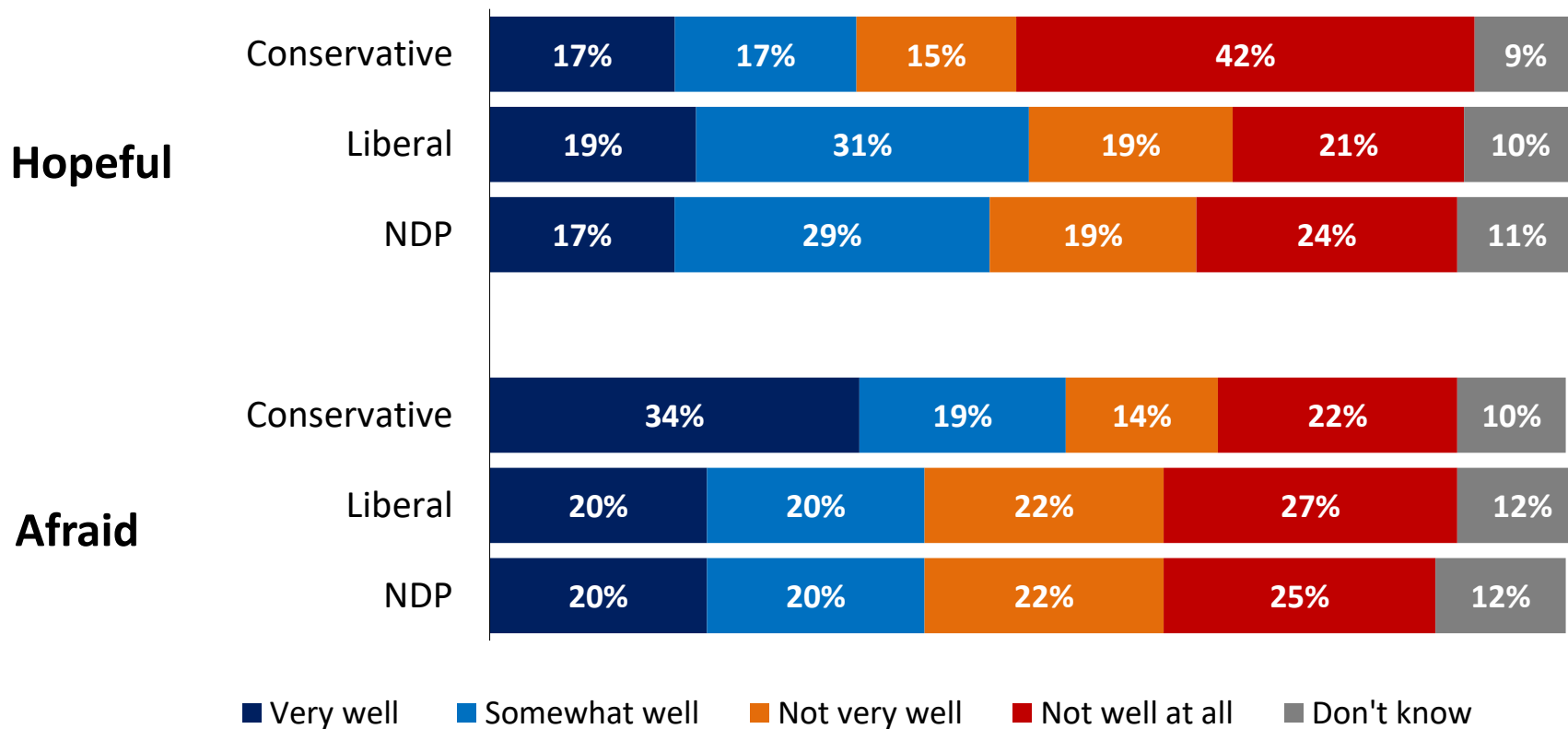
■ Liberal much better
■ Liberal somewhat better

■ NDP much better
■ NDP somewhat better

Emotion by party: Liberals won the battle of hopes and fears over the Conservatives

Q

So far in this federal election all three of the main parties, the Conservatives, the Liberals and the NDP, have been ahead in the polls at some point and all three may have an opportunity to form a government. If the **Conservatives/Liberals/NDP** form the next government ... How well does the term 'hopeful'/'afraid' describe how you feel about the possibility of a [re-elected] **Conservative/Liberal/NDP** government?

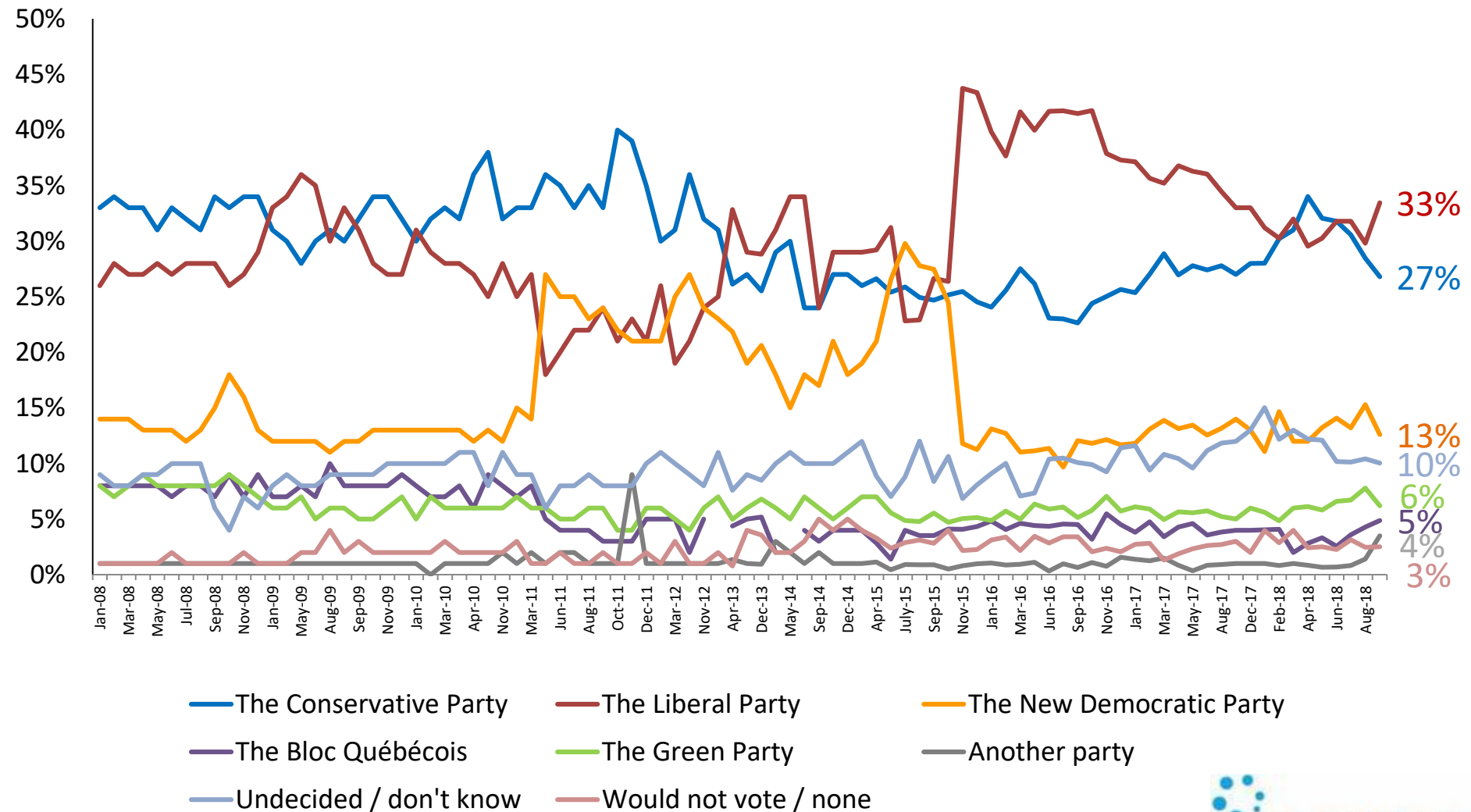


The Horse Race

Combined Federal Vote: Liberals (33%) grow lead to 7 points¹¹ over Conservatives (27%); NDP trails at 13%

Q

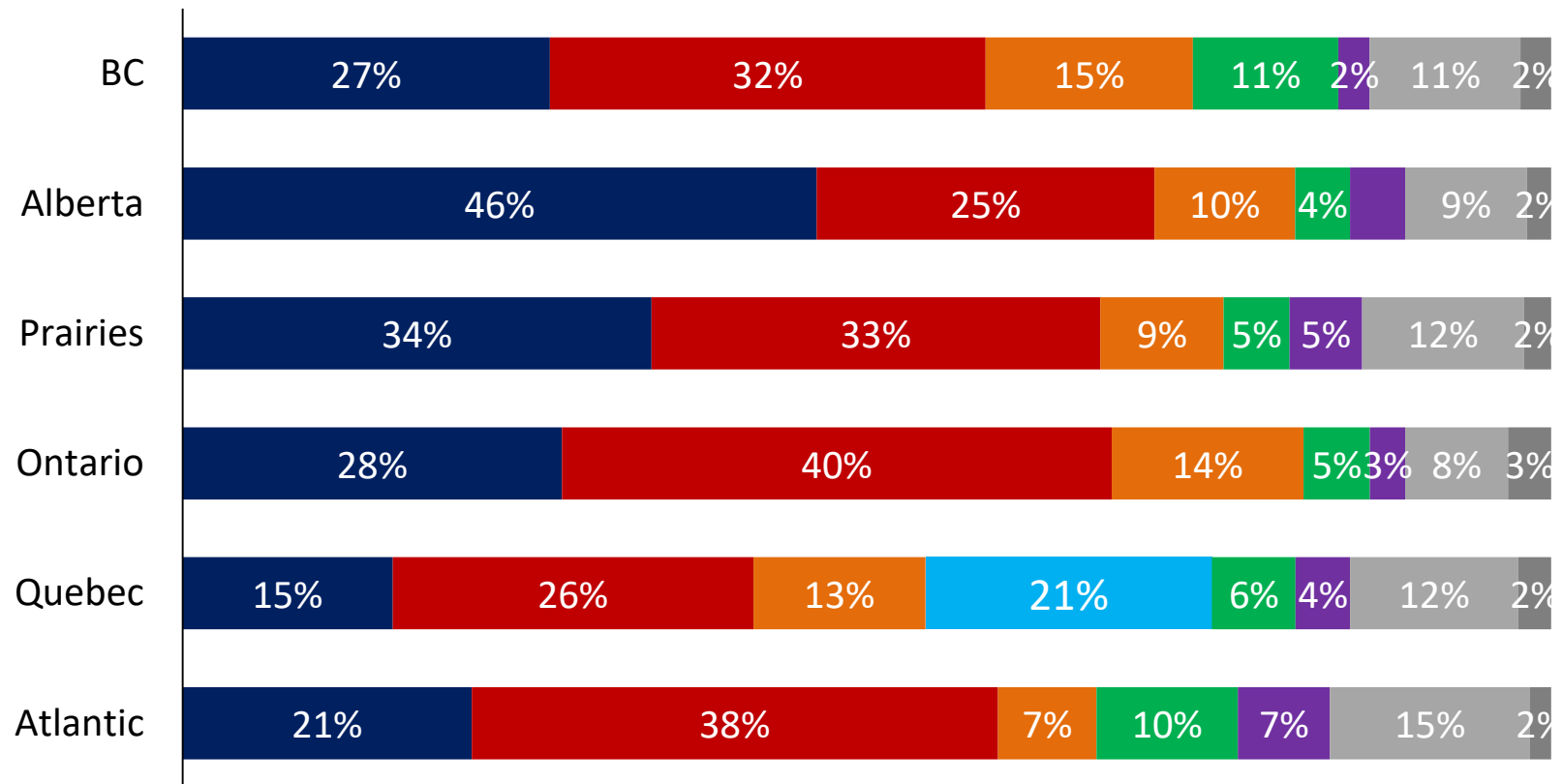
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]



Combined Federal Vote by Region: Liberals lead in every region except Alberta and the Prairies

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]



■ The Conservative Party
 ■ The Bloc Québécois
 ■ Undecided / don't know

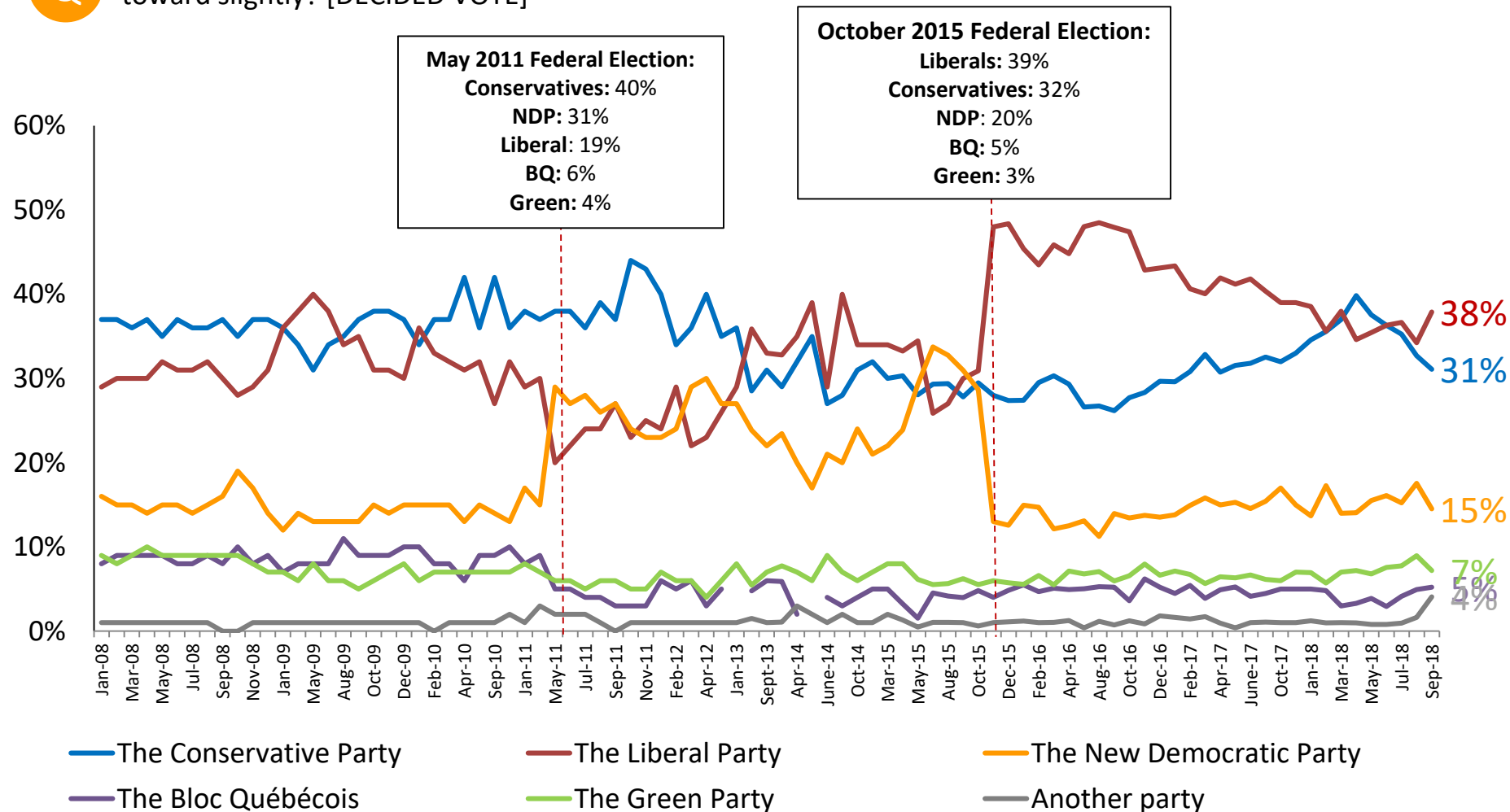
■ The Liberal Party
 ■ The Green Party
 ■ Would not vote / none

■ The New Democratic Party
 ■ Another party

Decided Federal Vote: Liberals (38%) lead CPC (31%) by 7 points, only 15% would vote NDP

Q

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

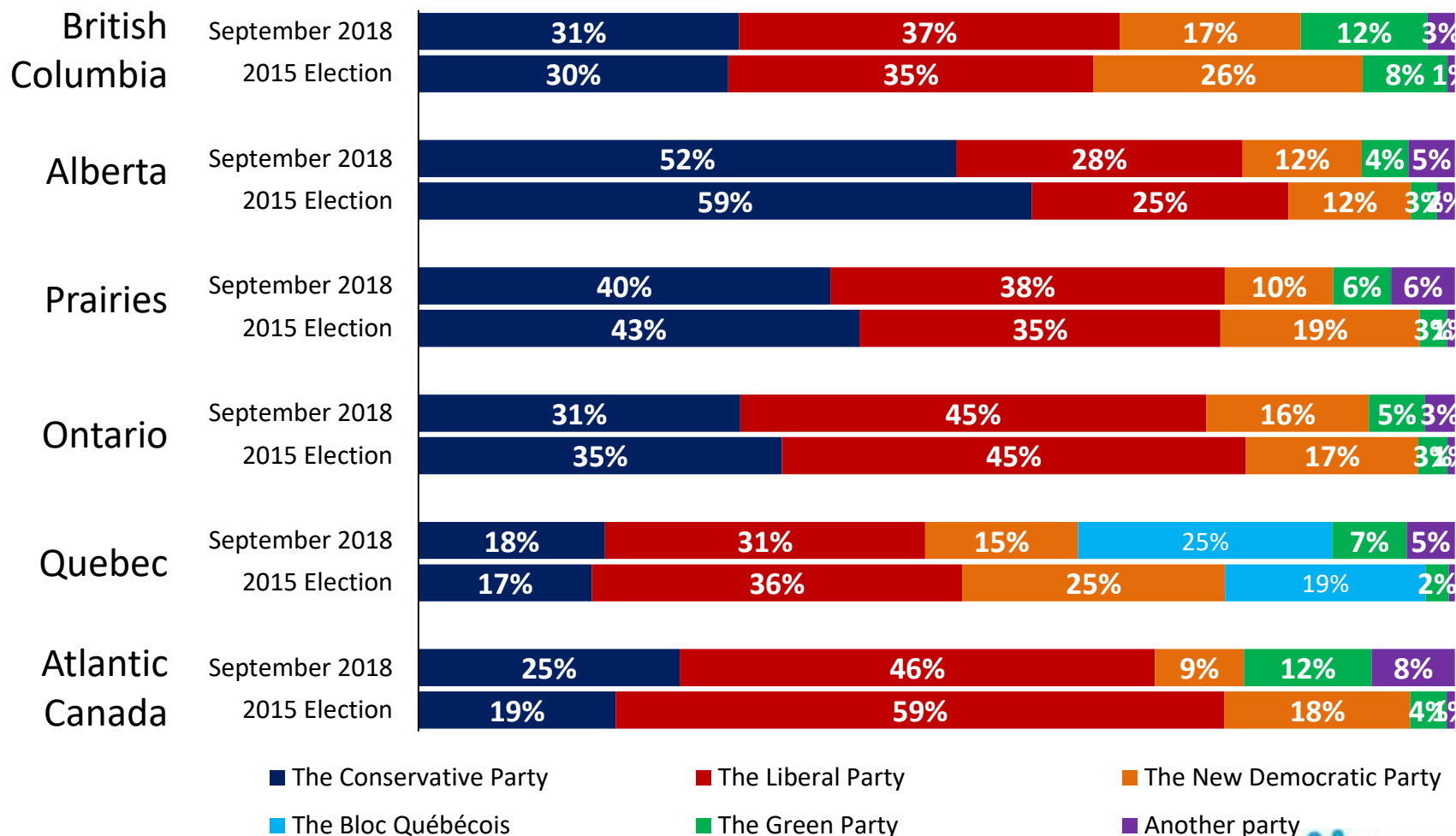


Note: People's Party of Canada (3%) added in September 2018, included in 'Another party' (4%)

Decided Federal Vote by Region: Liberals are down in Quebec since the 2015 election, holding steady in Ontario



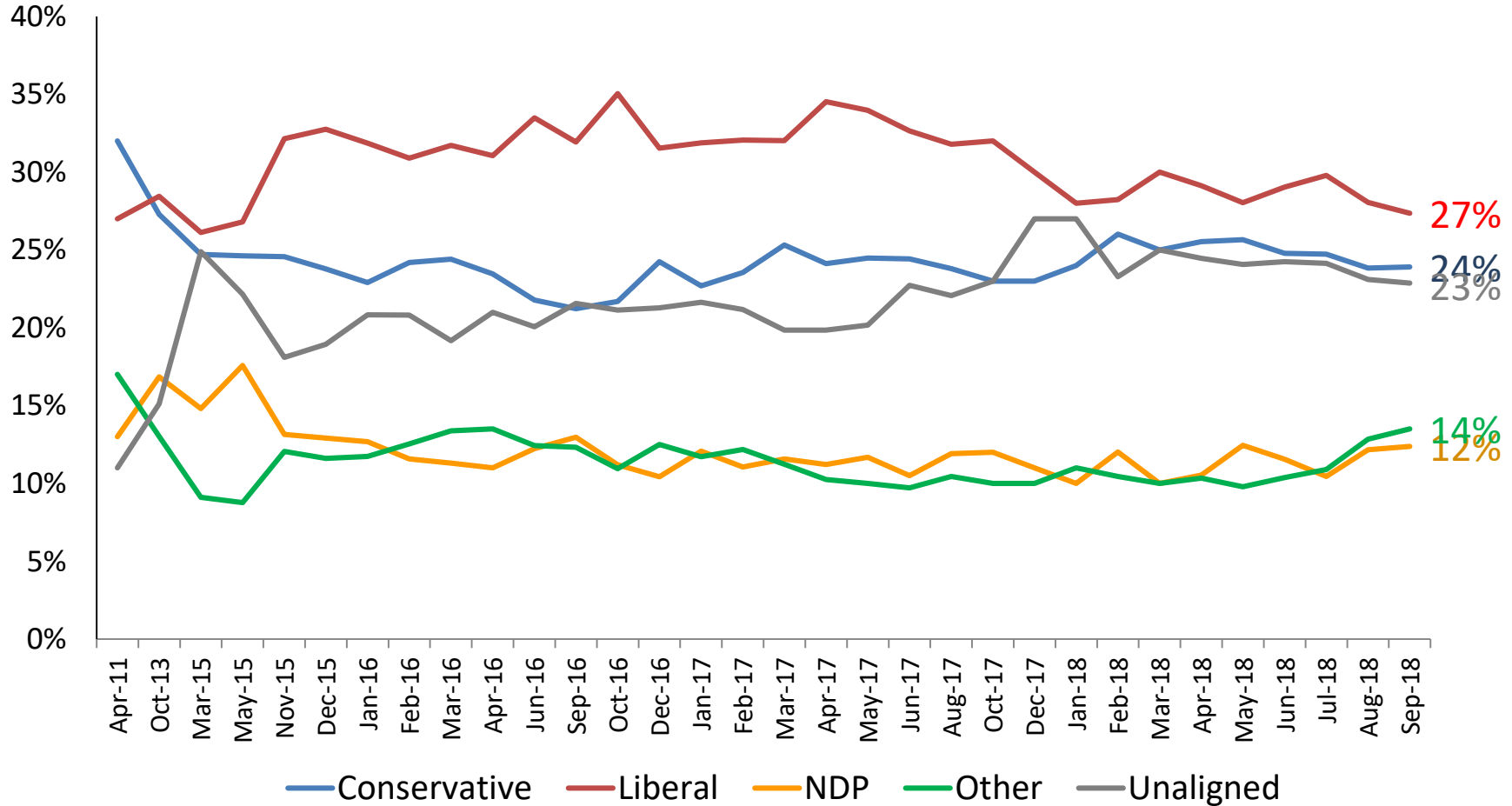
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [Decided Vote]



Understanding the Foundations

Federal Party ID: Liberals post election bounce has declined,¹⁶ now similar to last election

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



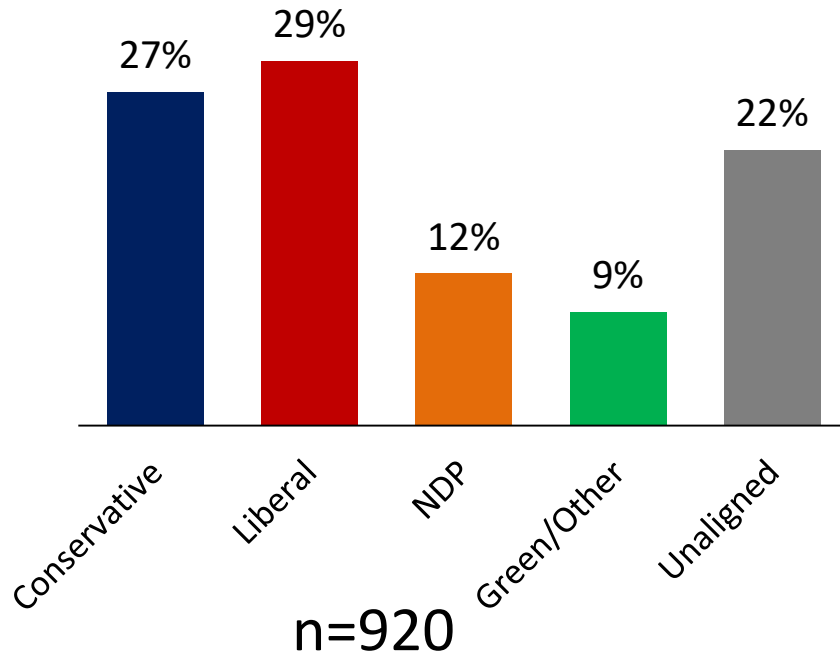
Federal Party ID: Liberal and Conservative partisans tied in Rest of Canada, but Liberals/Bloc tied in Quebec

17



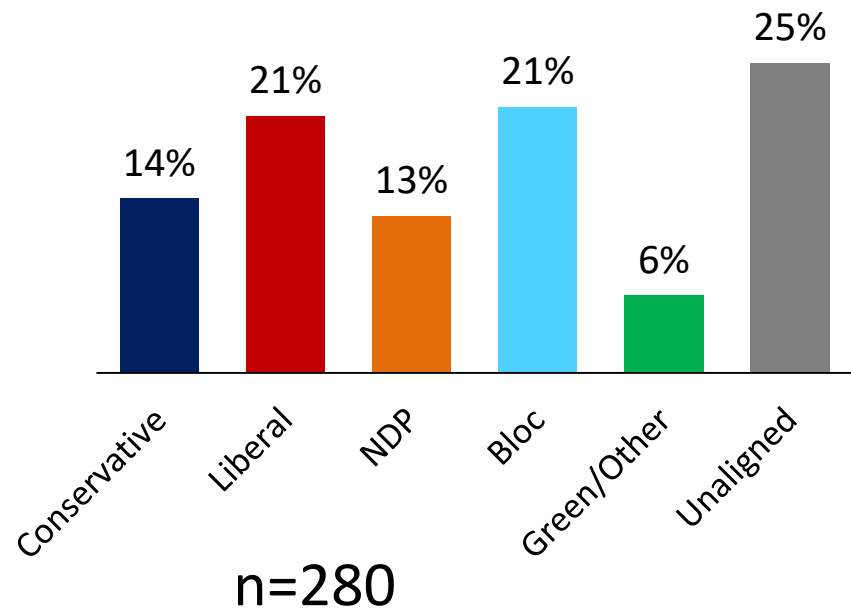
Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents]

Rest of Canada



Note: n=2,022 unweighted.

Quebec

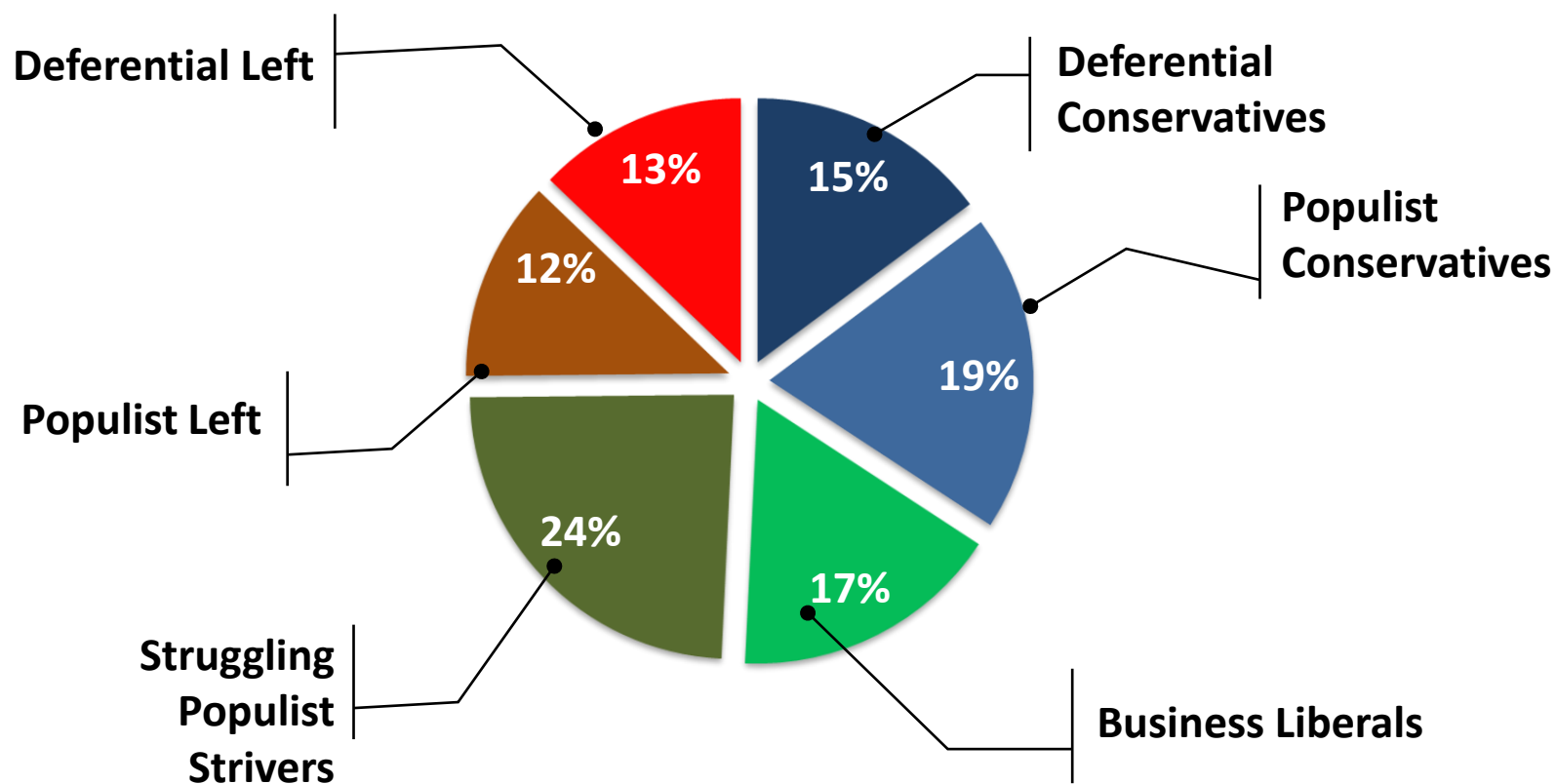


Note: n=388 unweighted.

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 six unique groups among respondents of this survey based on a series of value questions. 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?

		Overall	Deferential Conservatives	Populist Conservatives	Business Liberals	Struggling Populist Strivers	Populist Left	Deferential Left
Government spending should be based on...	Ability to afford	41%	74%	88%	22%	23%	22%	8%
	Public need	48%	13%	9%	69%	56%	67%	89%
Main role of government to...	Create equal opportunity	62%	80%	91%	93%	53%	17%	18%
	Redistribute wealth	28%	13%	5%	2%	27%	72%	73%
When it comes to government decision making...	Common sense	50%	0%	94%	42%	61%	85%	1%
	Listen to experts	34%	83%	0%	40%	16%	1%	87%
The profit system...	Brings out worst in human nature	36%	12%	7%	15%	51%	71%	77%
	Teaches hard work and success	46%	77%	82%	67%	18%	11%	10%

Note: “Neither” or “Don’t know” is not shown here.

Combined Federal Vote by Value Cluster

Value Clusters

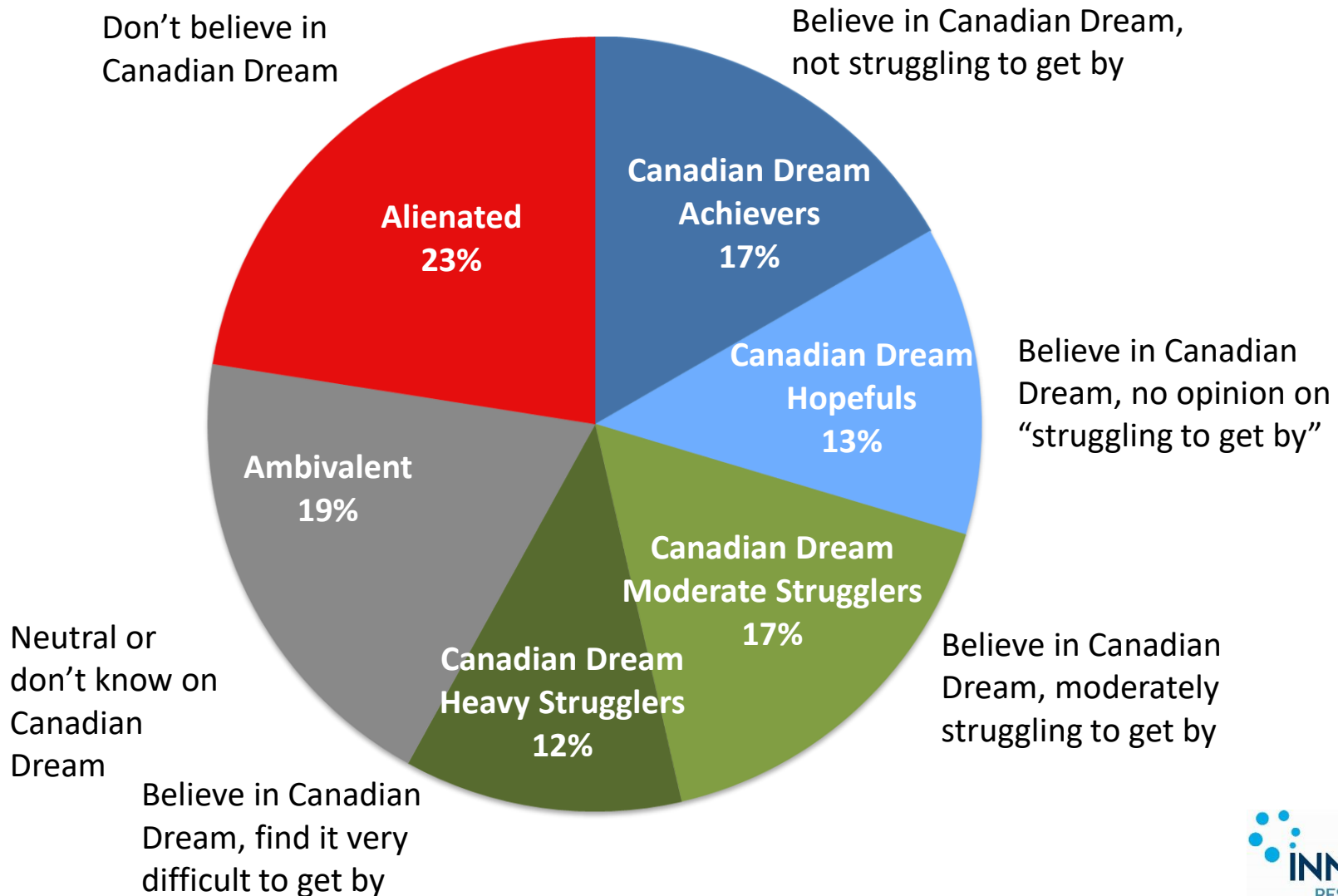
	Overall	Deferential Conservatives	Populist Conservatives	Business Liberals	Left Liberals	Thrifty Moderates	Core Left
Liberal	33%	31%	13%	43%	35%	27%	42%
Conservative	27%	40%	66%	25%	14%	20%	6%
NDP	13%	6%	3%	9%	22%	13%	23%
Bloc Quebecois	5%	2%	4%	5%	3%	6%	6%
Green Party	6%	5%	2%	6%	7%	6%	12%
People's Party	2%	4%	4%	2%	3%	2%	1%
Other	1%	2%	2%	0%	0%	2%	1%
Undecided/DK	10%	10%	5%	8%	10%	19%	9%
Would not Vote/None	2%	1%	0%	2%	4%	6%	1%

The Struggling Middle Class

Economic Alienation Segmentation: More than 4-in-10 (42%) are either Ambivalent or Alienated

Q

Agree with “Here in [PROVINCE] you can be anything you want if you are willing to work for it” BY Agree with “No matter how hard I work, every year it seems more difficult to get by”.



Combined Federal Vote by Economic Gap

Value Clusters

	Overall	Achievers	Hopefuls	Moderate Strugglers	Heavy Strugglers	Ambivalent	Alienated
Liberal	33%	38%	33%	32%	28%	31%	36%
Conservative	27%	38%	31%	32%	27%	22%	19%
NDP	13%	7%	12%	12%	12%	13%	19%
Bloc Quebecois	5%	4%	4%	6%	7%	5%	2%
Green Party	6%	4%	7%	5%	7%	7%	9%
People's Party	2%	2%	2%	3%	4%	2%	2%
Other	1%	1%	1%	2%	1%	1%	1%
Undecided/DK	10%	6%	8%	7%	11%	15%	11%
Would not Vote/None	2%	1%	2%	1%	3%	5%	2%

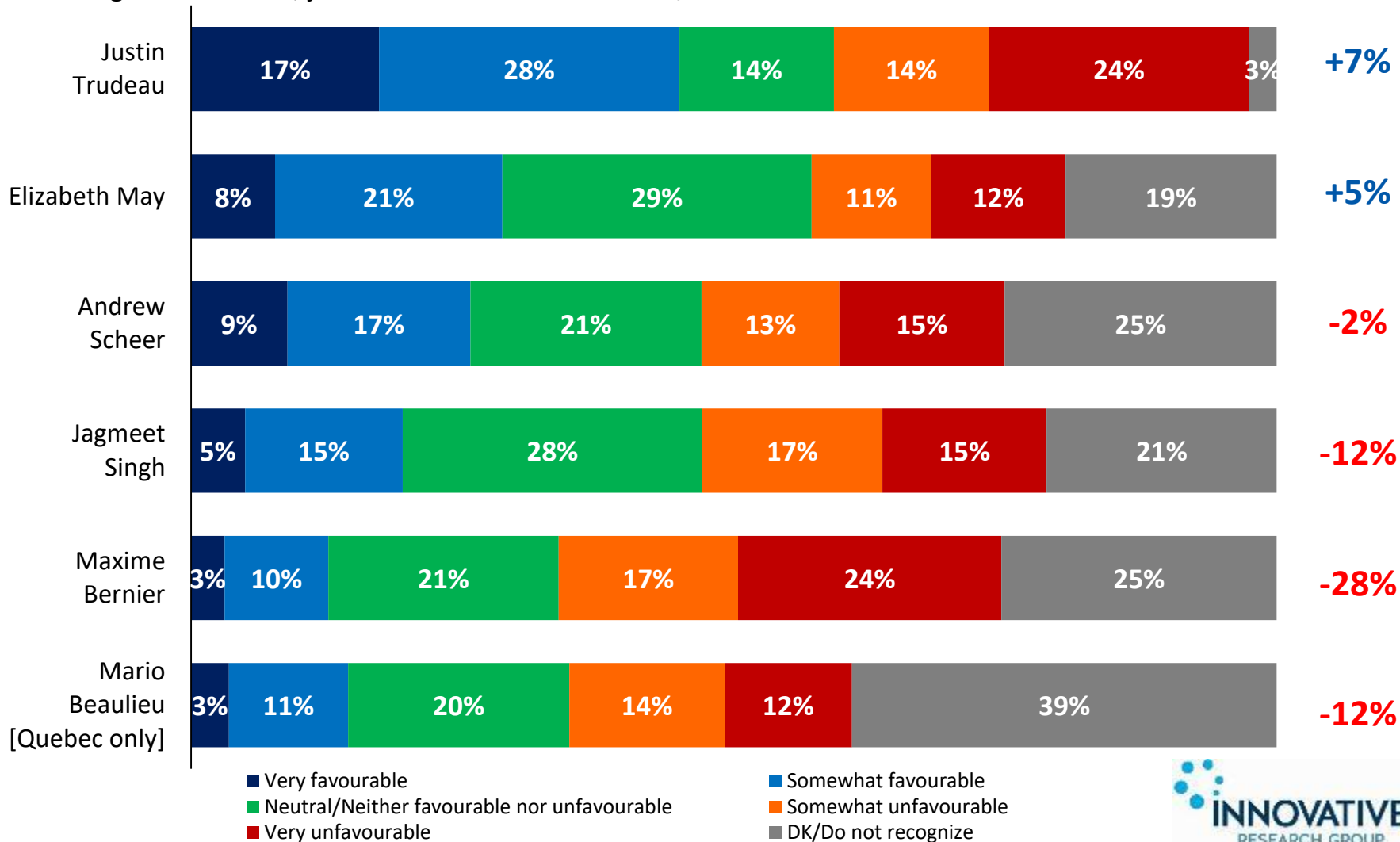
The Leaders

Leader Impressions: Trudeau seen most favourably of any leader, intensely negative impression of Bernier

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. [n=1,200, all respondents]

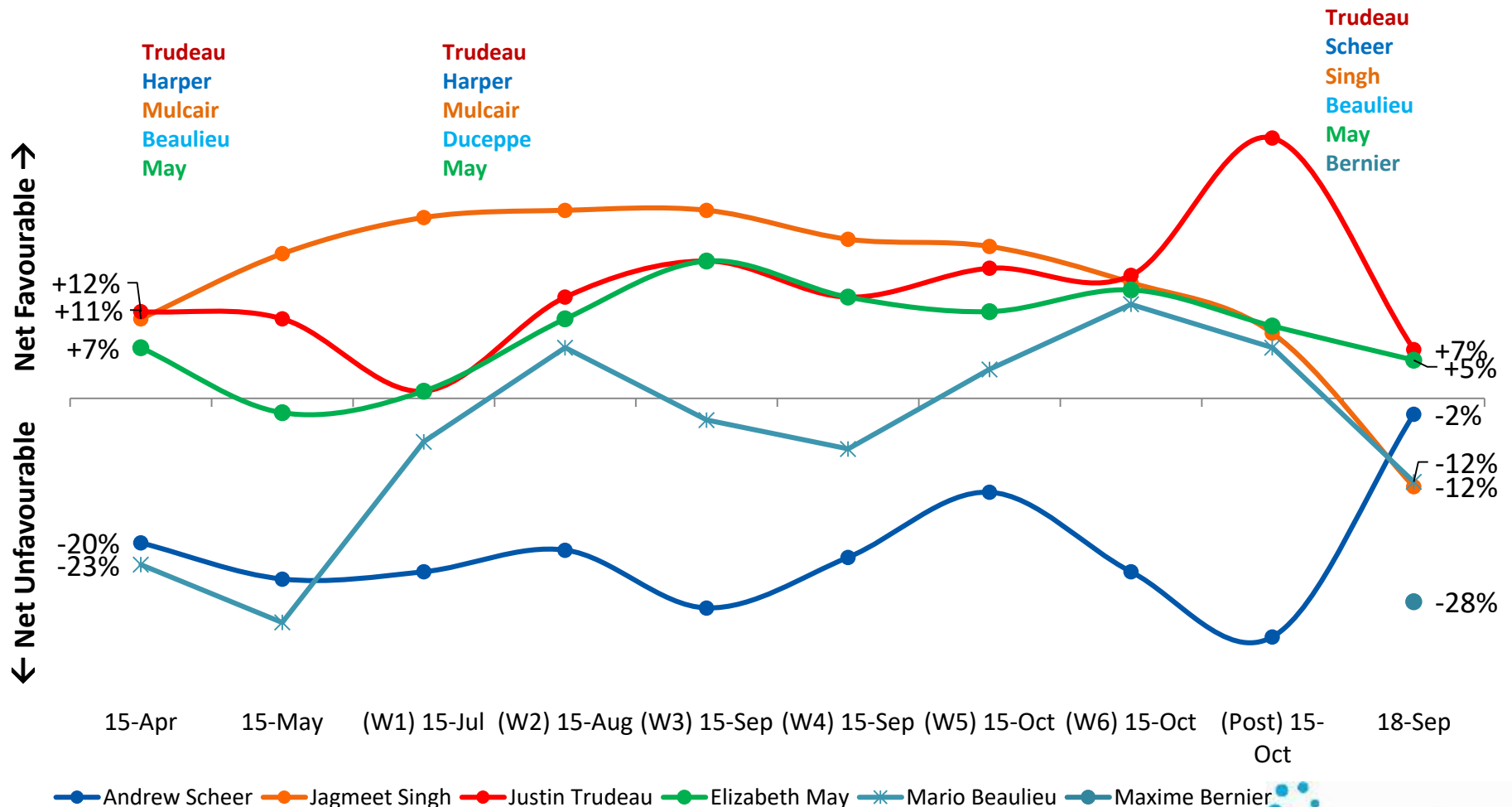
Net Favourability



Net leader favourables: Trudeau favourables drop sharply since post-election, Scheer improves on Harper's impression

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

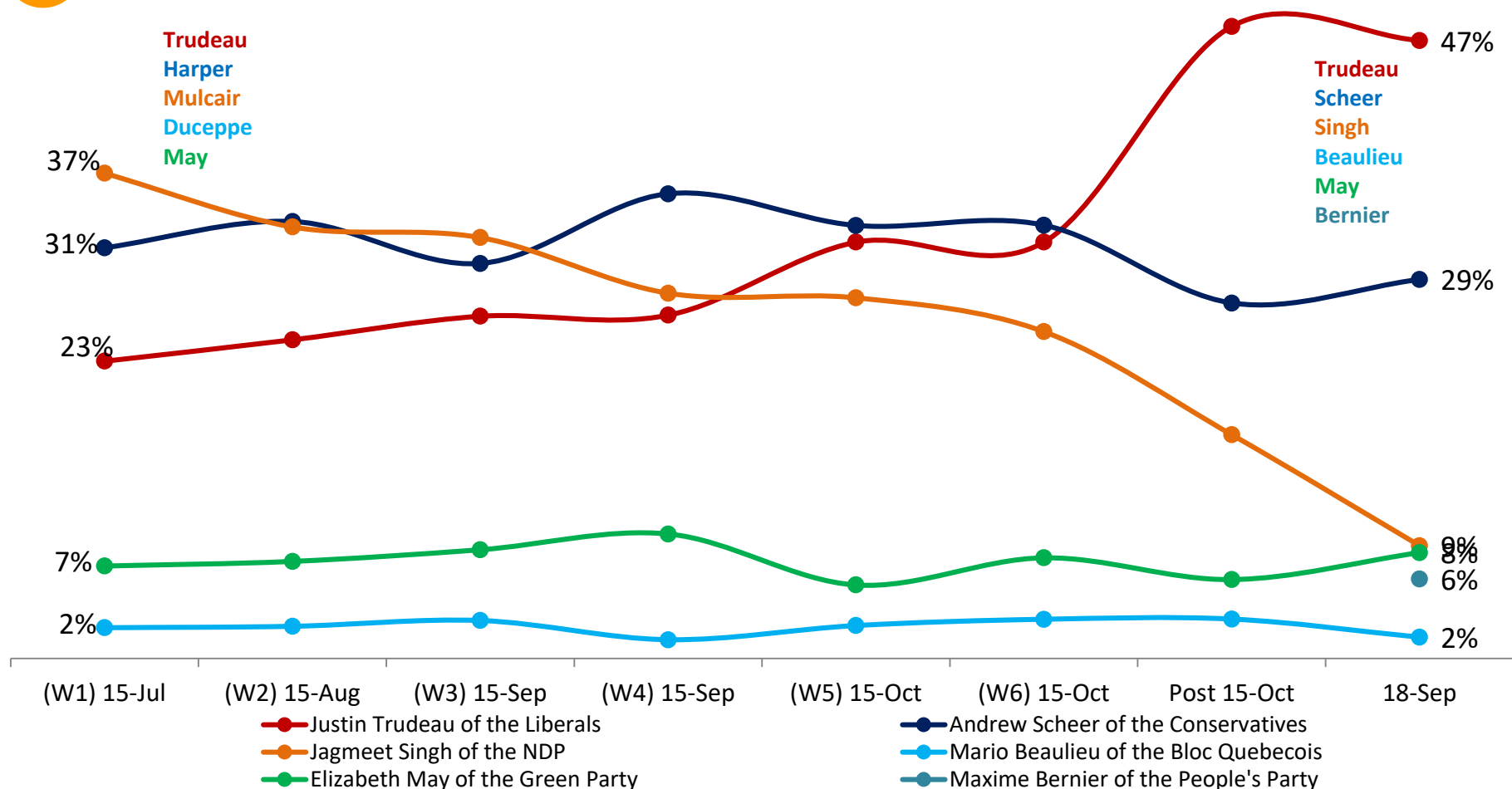


Best Prime Minister- Decided: Trudeau in a stronger position now than in last campaign

Q

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

[Bloc Quebecois asked only in Quebec] [Results show decided only, n=883]

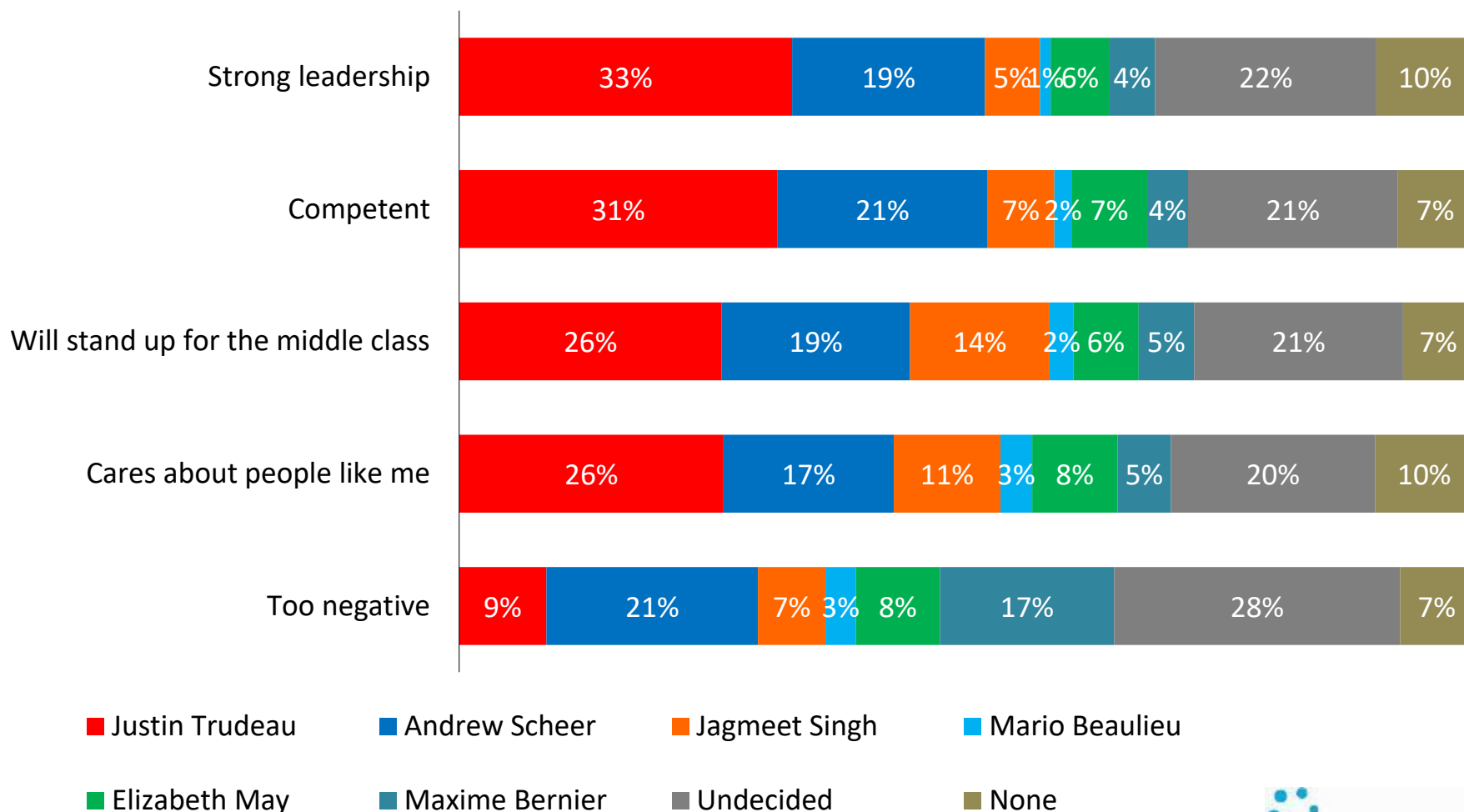


Note: 'None', 'Don't know', 'Refused' not included in calculations. Beaulieu/Duceppe asked in QC only.

Leader Qualities: Trudeau wins out on all positive leadership qualities over Scheer and Singh

Q

Now we would like to read you a list of different words or phrases that describe the some political leaders. For each word or phrase, please indicate who it BEST describes... **[ALL CANADA]**



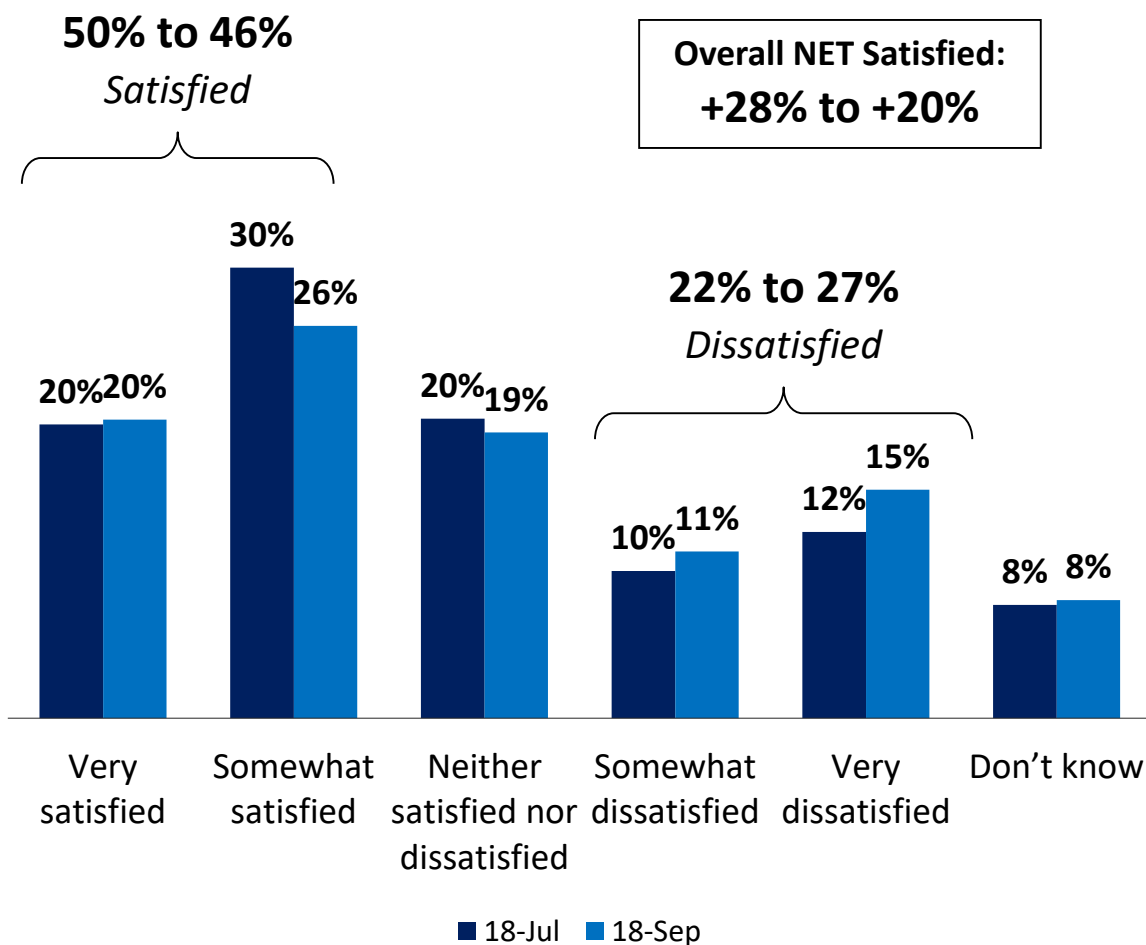
North American Free Trade Agreement

Satisfied with Trudeau: Plurality happy with Trudeau on trade although dissatisfaction was growing

Q

How satisfied are you with the way that Prime Minister Justin Trudeau and the federal Liberal government have been managing trade negotiations with the US?

[asked of all respondents]

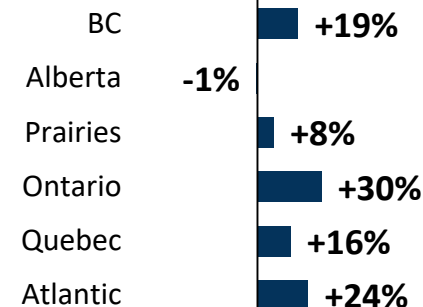


September 2018 Segmentation

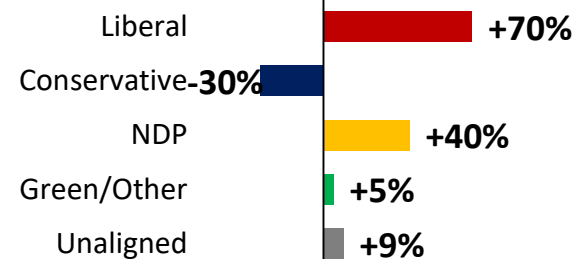
NET Satisfaction

(total satisfied minus total dissatisfied)

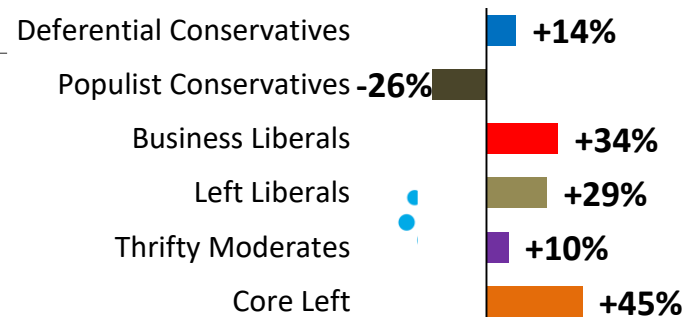
Region



Federal Party ID



Value Clusters

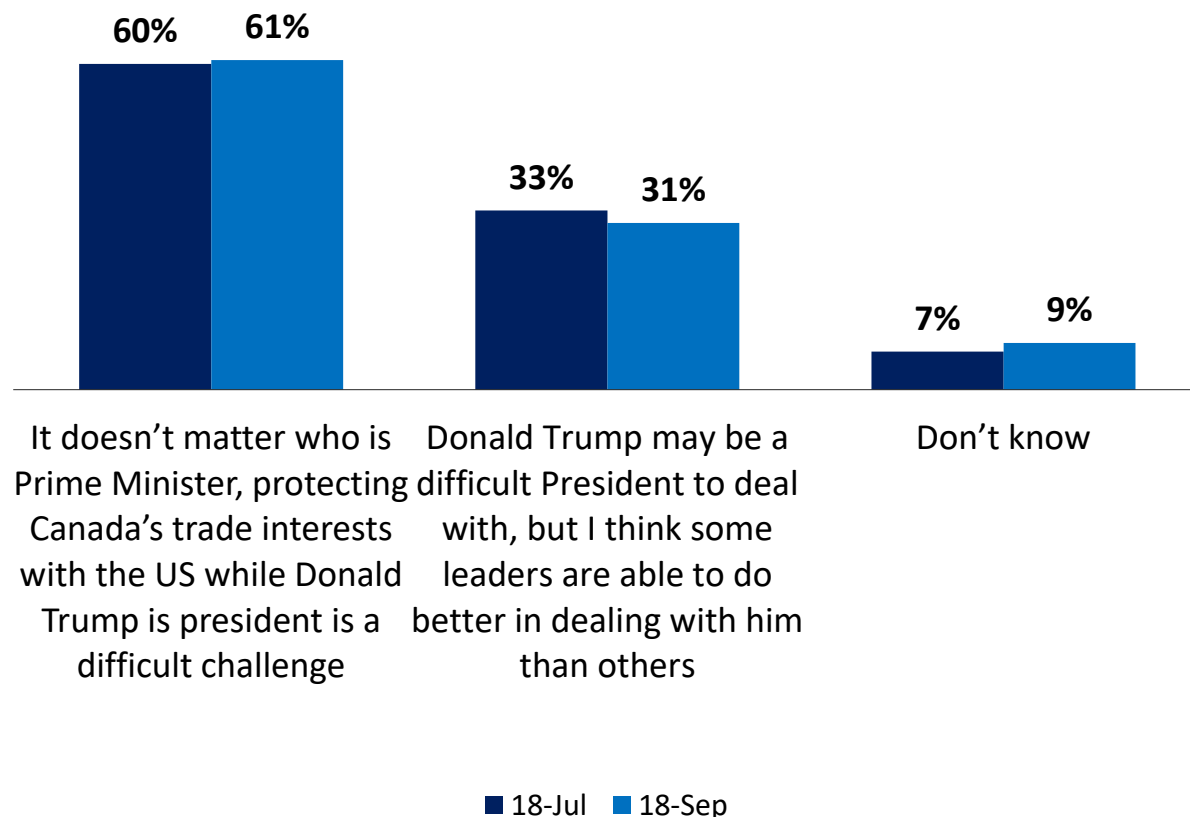


Some leaders better: 1-in-3 overall, but 54% of Conservatives feel some leaders would be better than others



Which of the following views is closest to your own?

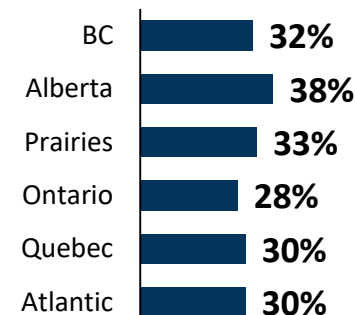
[asked of all respondents]



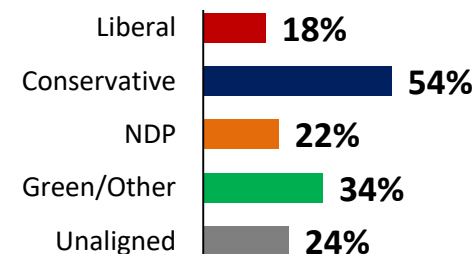
September 2018 Segmentation

Those who say "some leaders better"

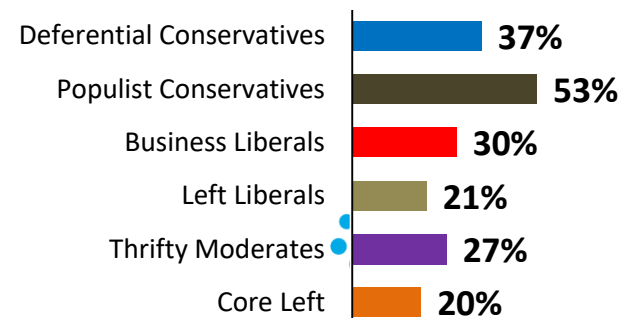
Region



Federal Party ID



Value Clusters

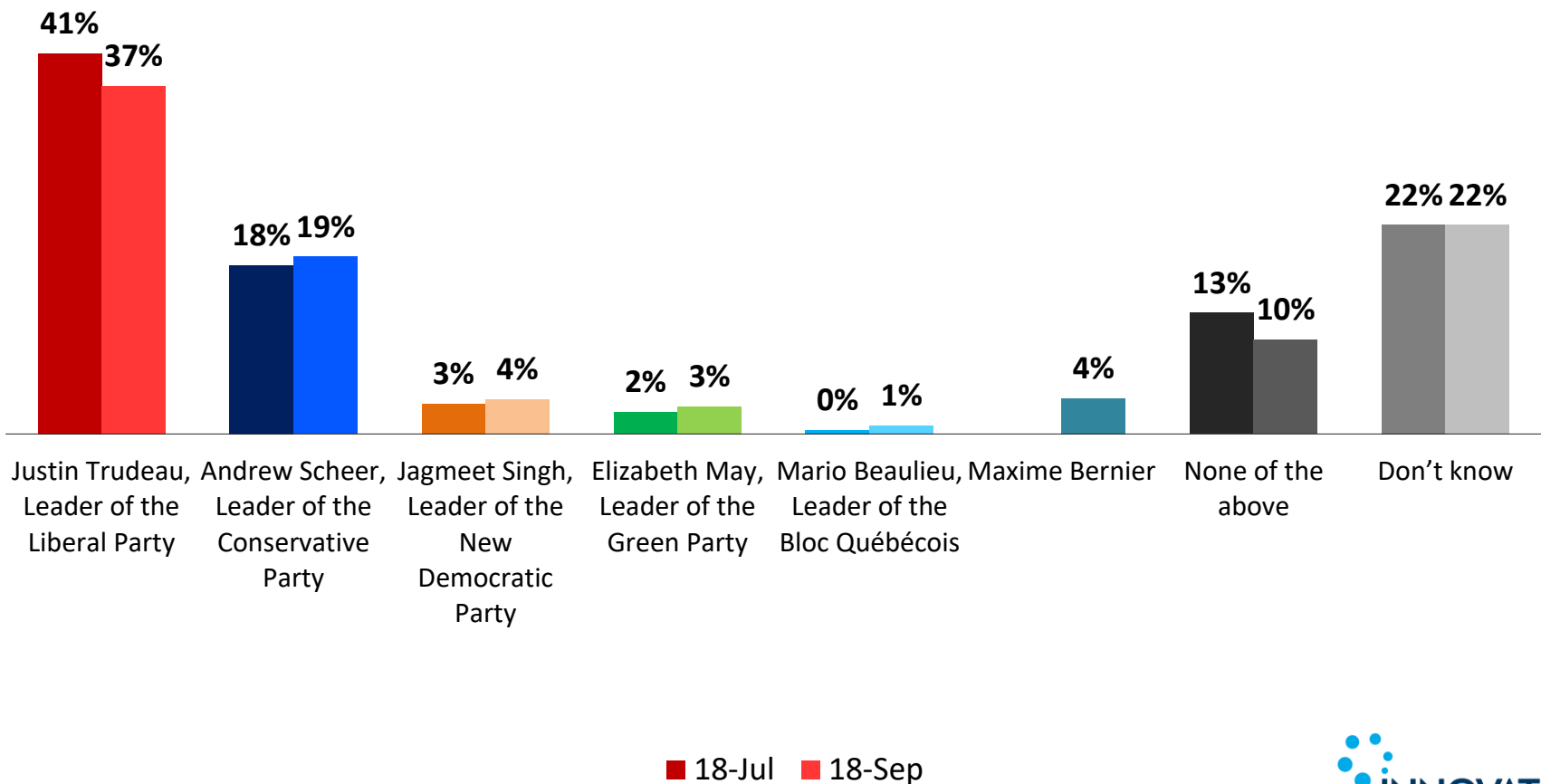


Which Leader: 37% feel Trudeau is best, including most Liberals and 39% of New Democrats

Q

Which leader do you feel is best able to protect Canada's interest in negotiations with Donald Trump?

[asked of all respondents]

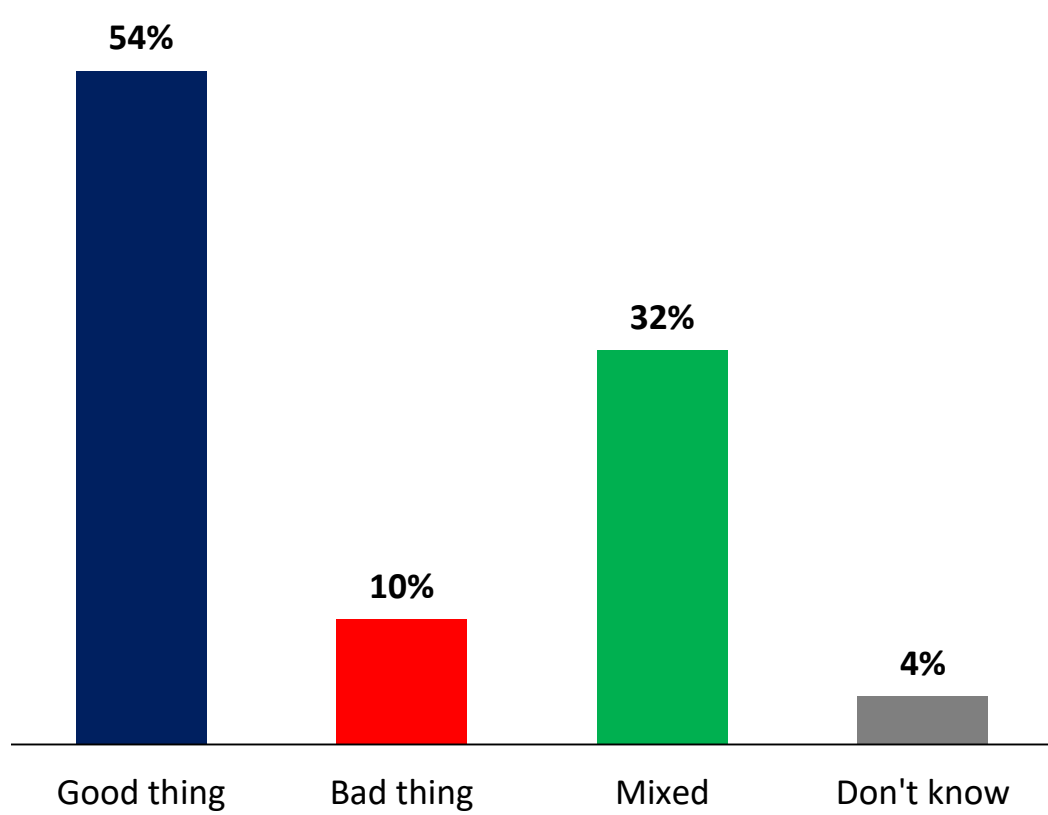


Immigration & Border Crossing

Legal Immigration: Majority (54%) of respondents think it's a good thing, Unaligned and Thrifty Moderates are least positive



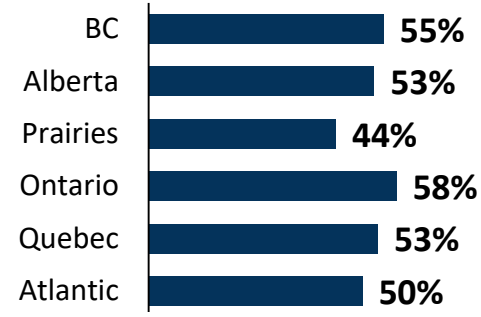
On the whole, do you think legal immigration is a good thing or bad thing for Canada?
[asked of all respondents]



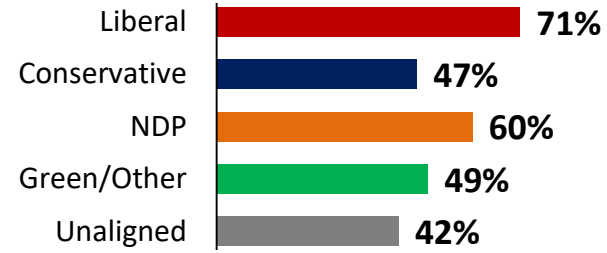
Sample Breakdown ▶▶

Those who say "good thing"

Region



Federal Party ID



Value Clusters

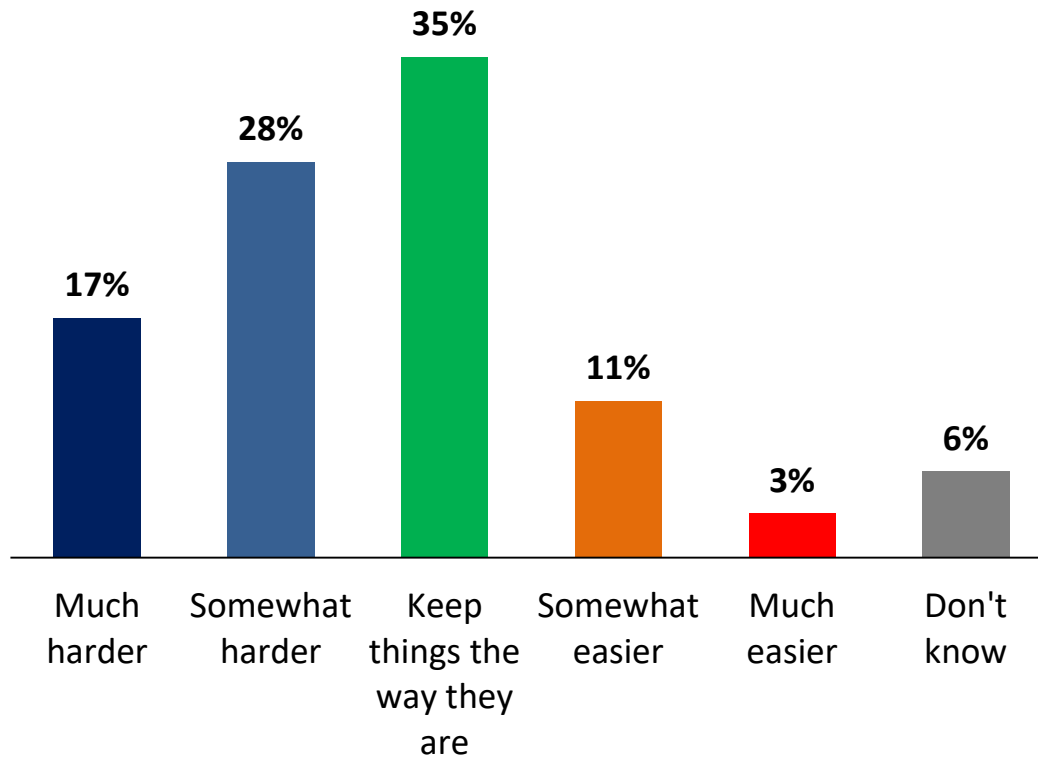


Ease of Immigration: Nearly half (45%) think it should be tougher to immigrate, 6-in-10 CPC-identifiers say, “harder”

Q

In general, do you think it should be harder or easier for people to legally immigrate to Canada or should we keep things the way they are?

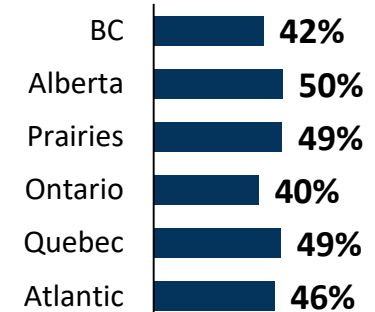
[asked of all respondents]



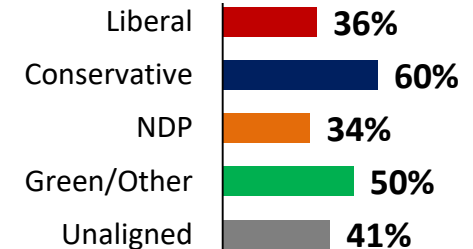
Sample Breakdown ►►

Those who say “harder”

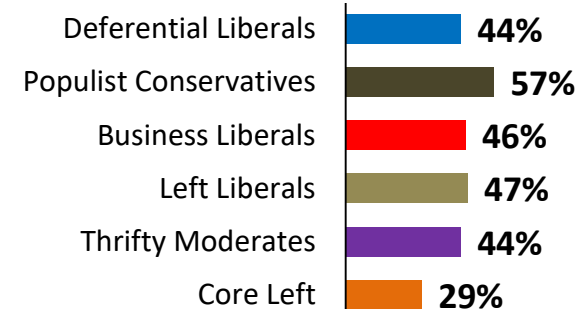
Region



Federal Party ID



Value Clusters

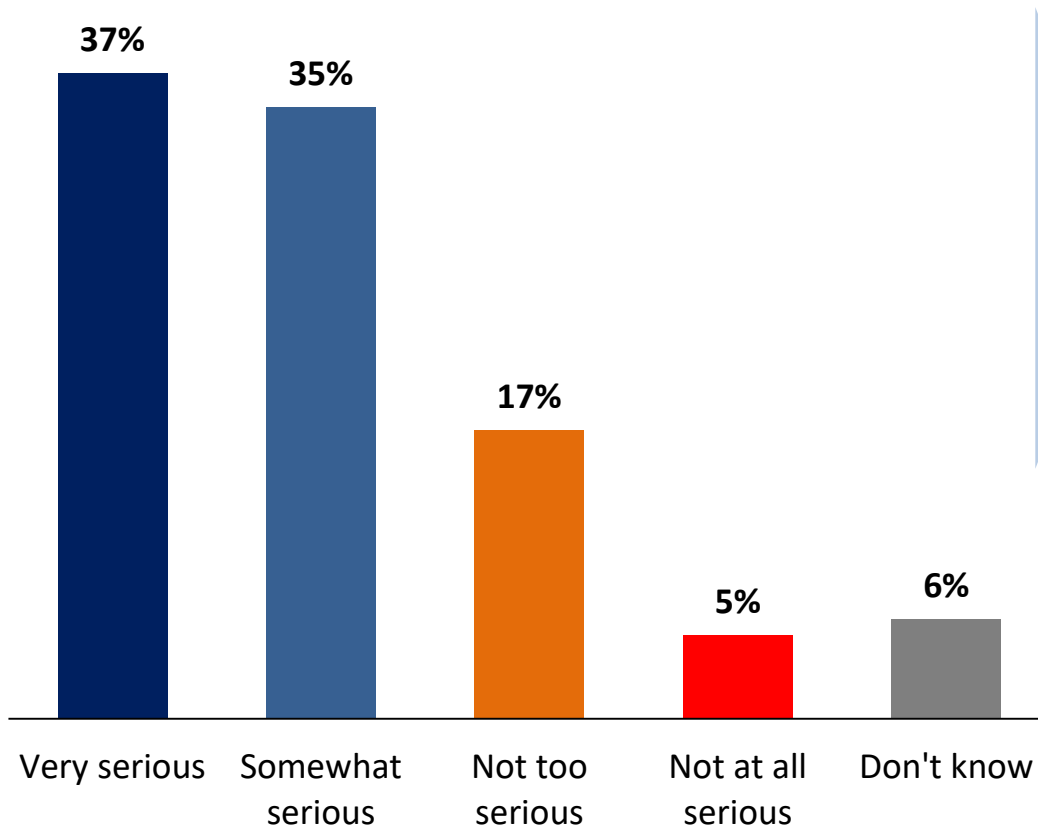


Illegal Immigration: 3-in-4 respondents (and 92% of CPC identifiers) think illegal immigration is a serious problem

Q

How serious a problem do you think the issue of immigrants who are crossing into Canada illegally right now?

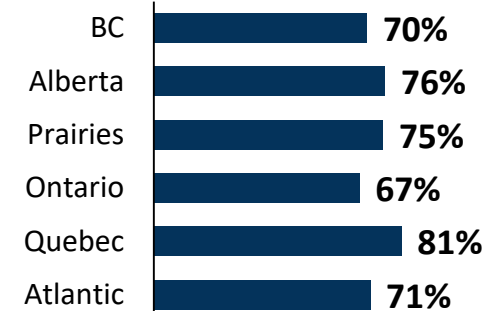
[asked of all respondents]



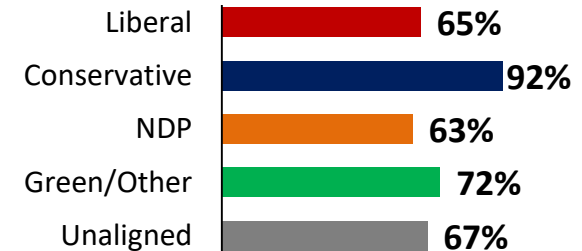
Sample Breakdown ►►

Those who say "serious"

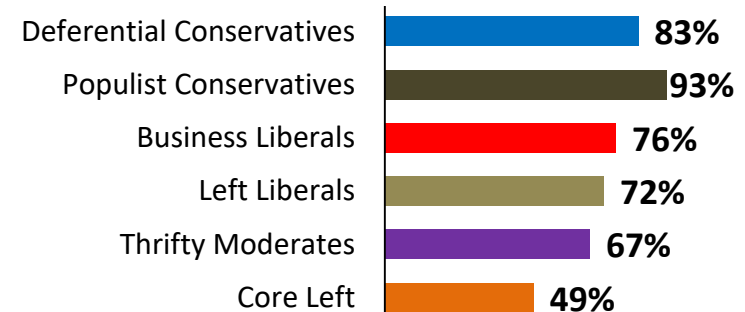
Region



Federal Party ID



Value Clusters

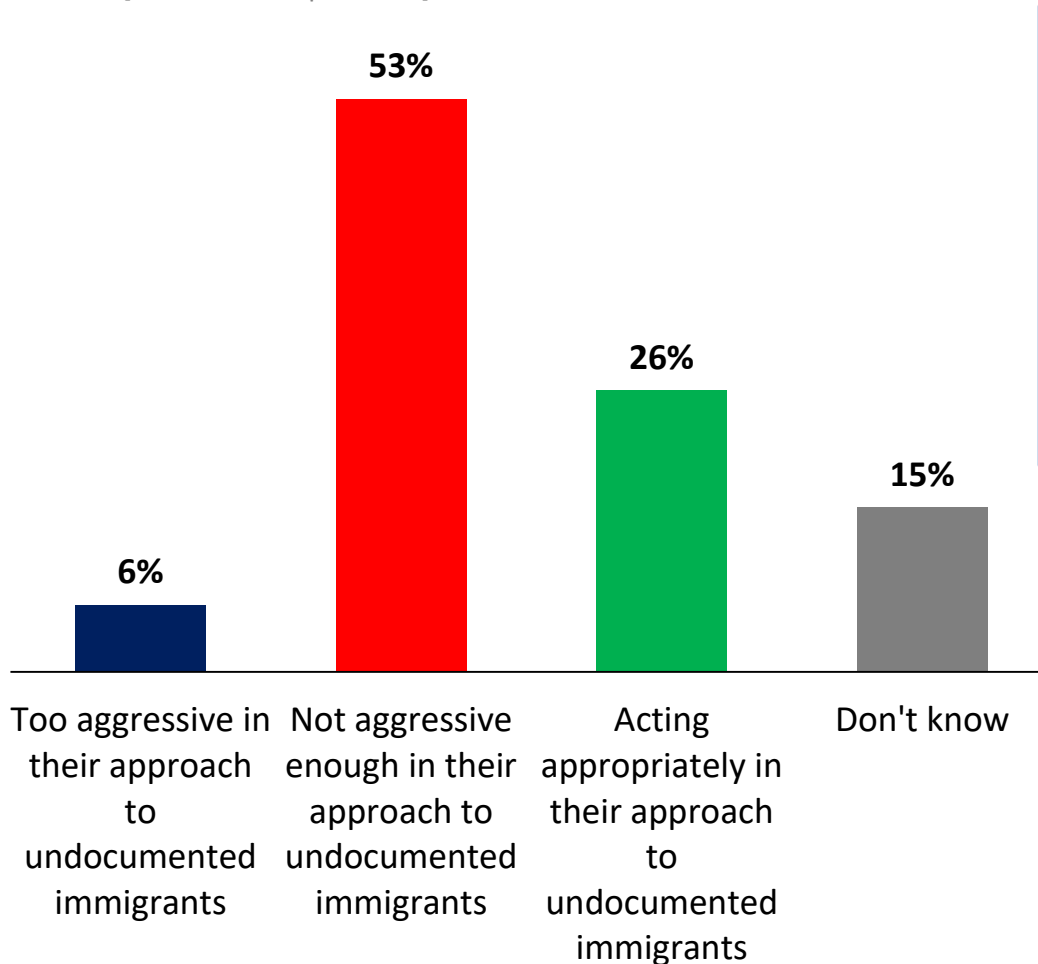


Trudeau: Majority (53%) say PM has not been aggressive enough in govt. approach to undocumented immigrants

Q

In your opinion, has Justin Trudeau and the federal government been too aggressive in their approach to immigrants who are crossing into Canada illegally, not aggressive enough, or have they been acting appropriately?

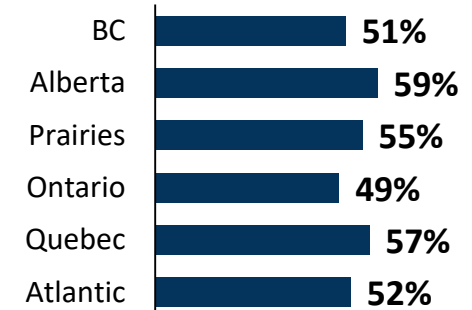
[asked of all respondents]



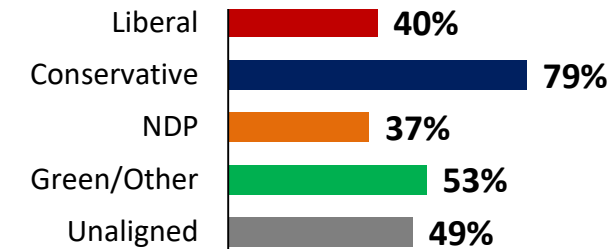
Sample Breakdown ►►

Those who say "not aggressive enough"

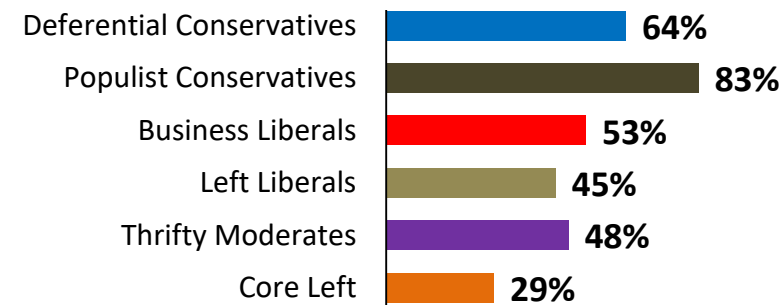
Region



Federal Party ID



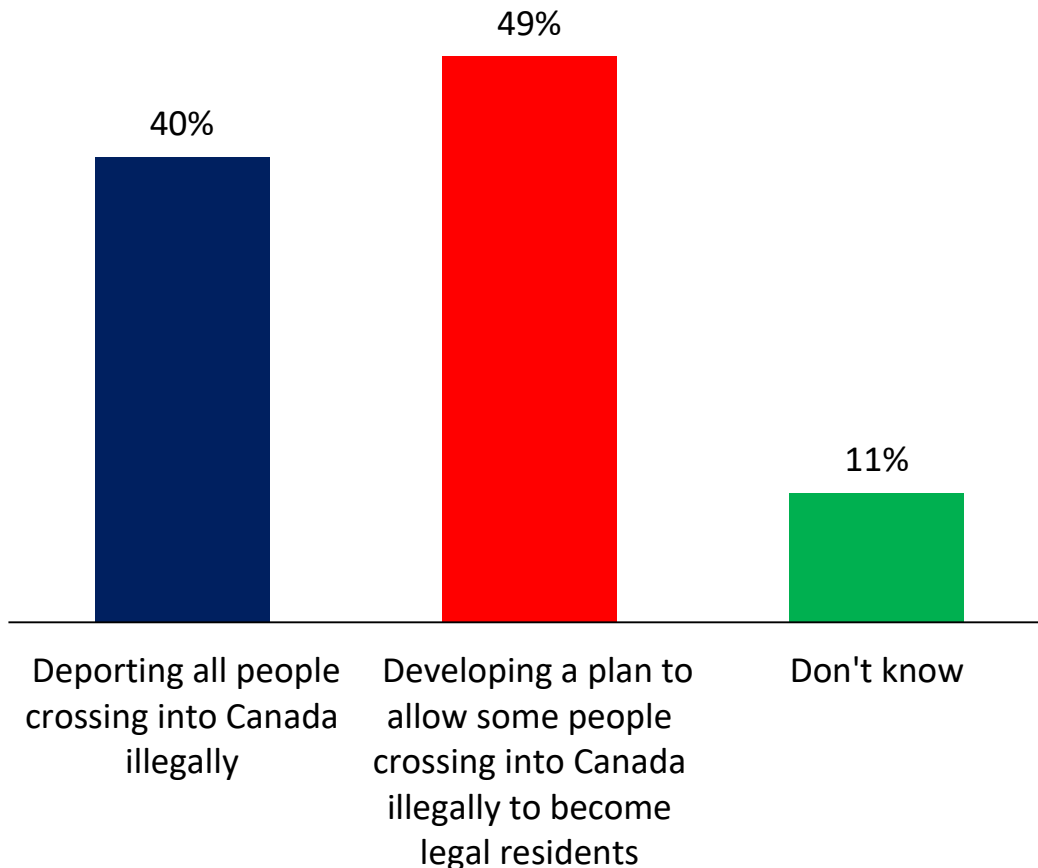
Value Clusters



Policy for Illegal crossing: Plurality (49%) prefer a path to legal residency; nearly 7-in-10 (68%) CPCs say, “deport”

Q In dealing with immigrants who are crossing into Canada illegally, should the federal government’s top priority be deporting all people crossing into Canada illegally, or developing a plan to allow some people crossing into Canada illegally to become legal residents?

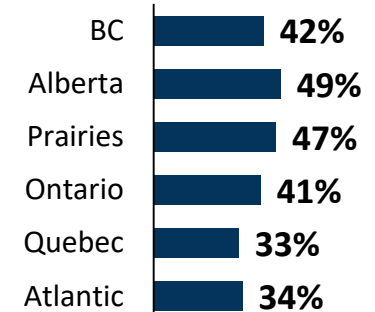
[asked of all respondents]



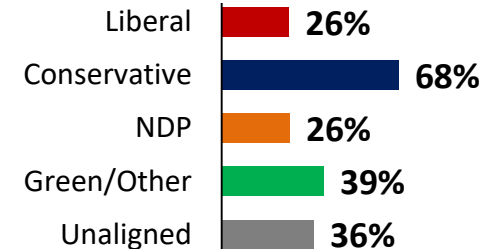
Sample Breakdown ►►

Those who say “deport”

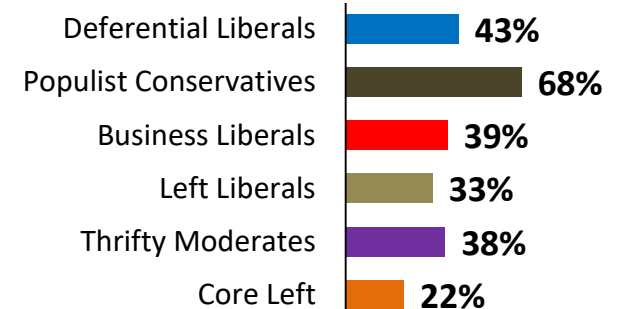
Region



Federal Party ID



Value Clusters

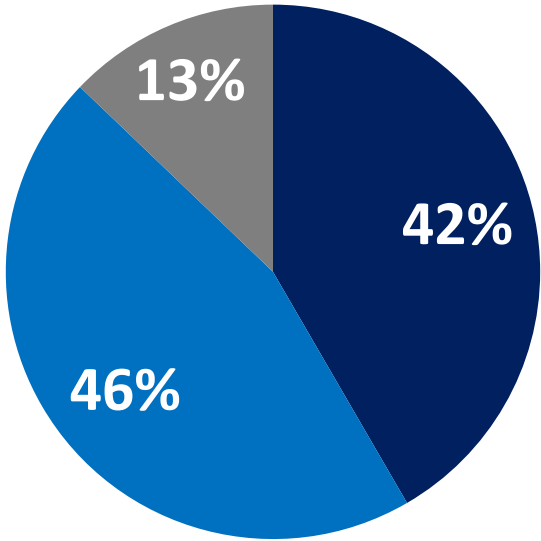


Max Bernier: Disruptor?

Bernier Key Values: Plurality (46%) feel growing number of newcomers strengthens Canadian society



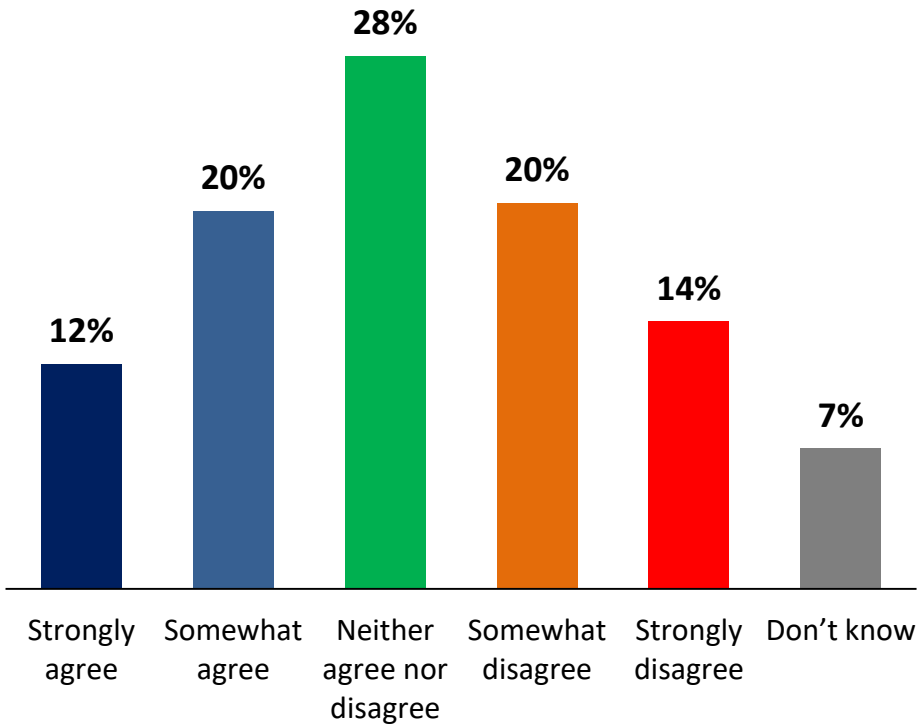
When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



- The growing number of newcomers from other countries threaten traditional Canadian customs and values
- The growing number of newcomers from other countries strengthens Canadian society
- Don't know



Do you agree or disagree with the following statements? ***The best government is the one which governs least.***



Bernier Value Groups:

The growing number of newcomers from other countries threatens vs. strengthens Canada

Threaten

Don't know

Strengthen

Agree

Neutral/DK

Disagree

Core
Supporters

Potential
Supporters

Conflicted

Potential
Supporters

Ambivalent

Likely
Opponents

Conflicted

Likely
Opponents

Core
Opponents

The best government governs least

Bernier Value Groups, Quebec: 10% of Quebec respondents open to Bernier-style populism message

The growing number of newcomers from other countries threatens vs. strengthens Canada

Threaten

Agree

Core
Supporters:
10%

Neutral/DK

Potential
Supporters:
17%

Disagree

Conflicted:
21%

Don't know

Potential
Supporters:
1%

Ambivalent:
7%

Likely
Opponents:
5%

Strengthen

Conflicted:
9%

Likely
Opponents:
12%

Core
Opponents:
18%

The best government governs least

Bernier Value Groups, Rest of Canada: 19% of Rest of Canada open to Bernier message

The growing number of newcomers from other countries threatens vs. strengthens Canada

Threaten

Agree

Core
Supporters:
19%

Neutral/DK

Potential
Supporters:
13%

Disagree

Conflicted:
8%

Don't know

Potential
Supporters:
3%

Ambivalent:
7%

Likely
Opponents:
2%

Strengthen

Conflicted:
12%

Likely
Opponents:
15%

Core
Opponents:
20%

The best government governs least

Bernier Value Groups, 1st/2nd choice Vote: 19% of Agree/Threaten group would vote 1st or 2nd for Bernier

The growing number of newcomers from other countries threatens vs. strengthens Canada

Threaten

Agree

Core
Supporters:
19%

Neutral/DK

Potential
Supporters:
5%

Disagree

Conflicted:
7%

Don't know

Potential
Supporters:
8%

Ambivalent:
2%

Likely
Opponents:
0%

Strengthen

Conflicted:
6%

Likely
Opponents:
5%

Core
Opponents:
2%

The best government governs least

Bernier Value Groups, Net Favourable: Agree/Threaten group show most positive net impression of Bernier

The growing number of newcomers from other countries threatens vs. strengthens Canada

Threaten

Don't know

Strengthen

Agree

Neutral/DK

Disagree

Core
Supporters:
0%

Potential
Supporters:
-14%

Conflicted:
-29%

Potential
Supporters:
-18%

Ambivalent:
-16%

Likely
Opponents:
-51%

Conflicted:
-30%

Likely
Opponents:
-32%

Core
Opponents:
-60%

The best government governs least

Carbon Tax

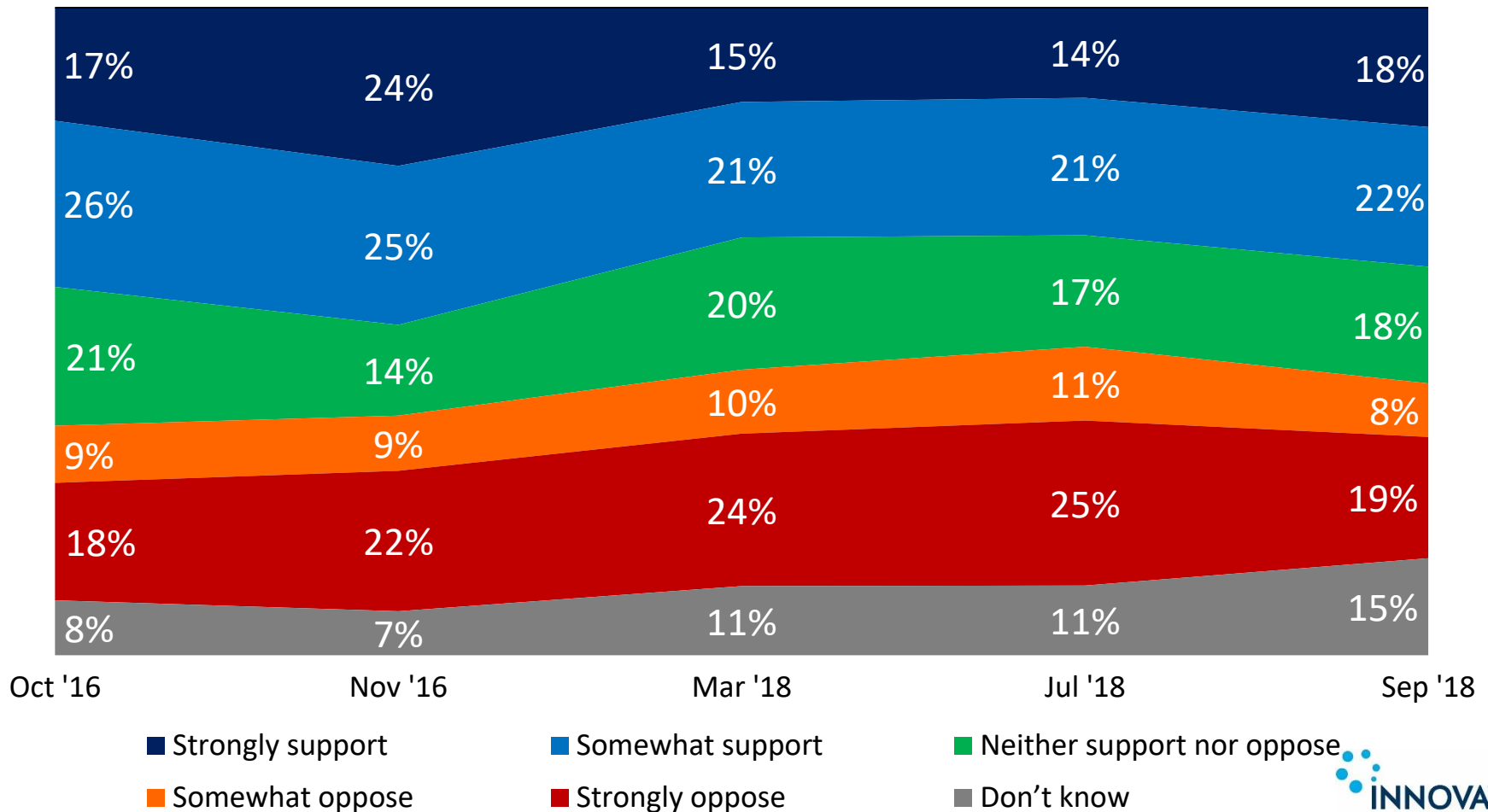
Support for Carbon Tax: 4-in-10 (40%) support minimum price, opposition (27%) at lowest levels since tracking began

Q

Do you support or oppose the federal government implementing the following policy?

Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.

[asked of all respondents; November 2016 and March 2018, n=1,500; July 2018, n=1,200]



Support/Oppose by Region/Party ID: 6-in-10 (60%) CPC-identifiers oppose the carbon tax, 6-in-10 Liberals support it

	Region						Party ID				
	BC	AB	Prairies	Ontario	QC	Atlantic	Liberal	CPC	NDP	Other	Unaligned
Strongly support	17%	12%	17%	19%	24%	12%	30%	5%	27%	25%	10%
Somewhat support	22%	21%	19%	24%	20%	15%	30%	12%	25%	24%	18%
Neither support nor oppose	21%	14%	17%	16%	20%	24%	16%	15%	24%	16%	21%
Somewhat oppose	9%	12%	6%	8%	7%	11%	7%	14%	3%	7%	7%
Strongly oppose	20%	33%	32%	16%	11%	24%	6%	45%	4%	17%	15%
Don't know	12%	9%	9%	17%	18%	14%	10%	8%	17%	11%	30%
SUPPORT	39%	33%	37%	43%	43%	27%	60%	18%	52%	50%	28%
OPPOSE	29%	44%	38%	23%	18%	35%	13%	60%	8%	24%	21%
NET SUPPORT	+10%	-12%	-1%	+20%	+25%	-8%	+47%	-42%	+44%	+25%	+6%

Support/Oppose by Cluster/Gap: Net support highest among Business Liberals, Left Liberals and Core Left

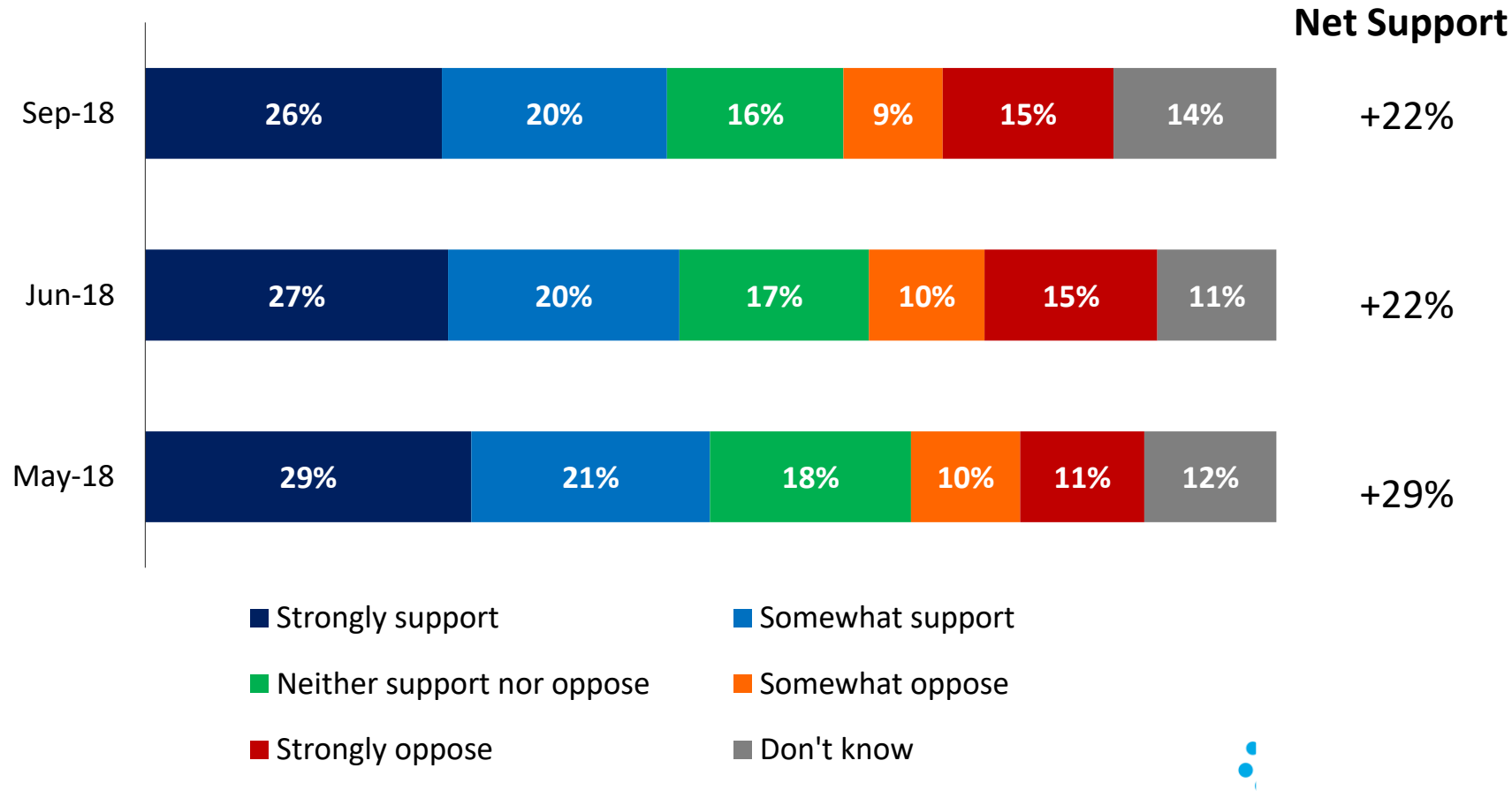
	Value Cluster						Economic Gap					
	Def Con.	Pop Con.	Business Liberals	Left Liberals	Thrifty Mod.	Core Left	Achievers	Hopefuls	Mod. Strugglers	Heavy Strugglers	Ambiv.	Alienated
Strongly support	17%	6%	18%	16%	13%	38%	26%	15%	15%	17%	13%	23%
Somewhat support	21%	11%	28%	24%	16%	25%	22%	24%	27%	15%	21%	21%
Neither support nor oppose	21%	10%	21%	23%	20%	12%	11%	18%	21%	22%	20%	17%
Somewhat oppose	9%	12%	9%	7%	8%	5%	11%	9%	8%	6%	8%	7%
Strongly oppose	22%	54%	13%	11%	15%	6%	21%	19%	18%	24%	14%	19%
Don't know	11%	6%	12%	18%	28%	14%	8%	15%	11%	16%	25%	13%
SUPPORT	38%	18%	46%	40%	29%	63%	48%	39%	42%	31%	34%	44%
OPPOSE	30%	66%	21%	18%	22%	11%	33%	28%	26%	30%	22%	26%
NET SUPPORT	+8%	-49%	+25%	+22%	+7%	+52%	+15%	+11%	+16%	+1%	+12%	+17%

TMX Pipeline

Approval: Plurality of respondents support the approval of the pipeline, but net support is down since May



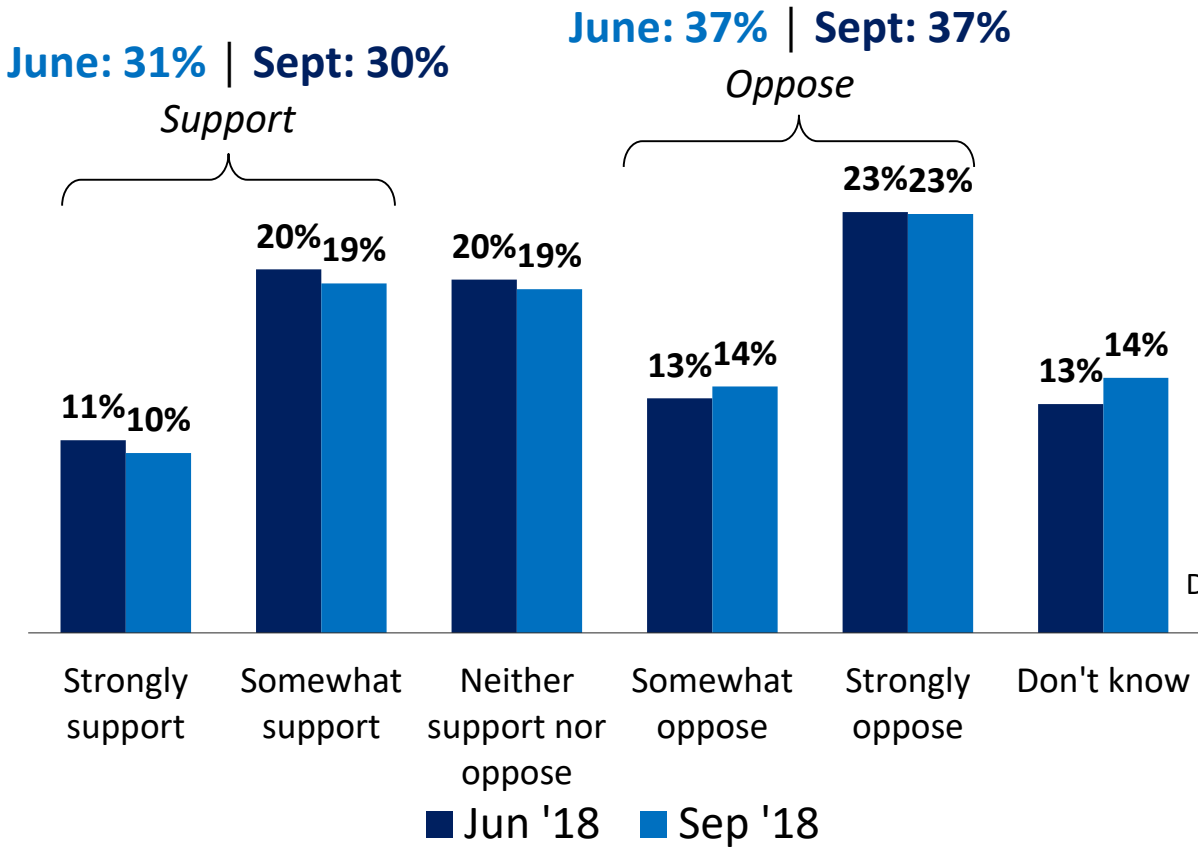
In 2016, the federal government announced it approved the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline). Thinking about that decision, do you support or oppose the federal government decision to approve the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline)?
[asked of all respondents]



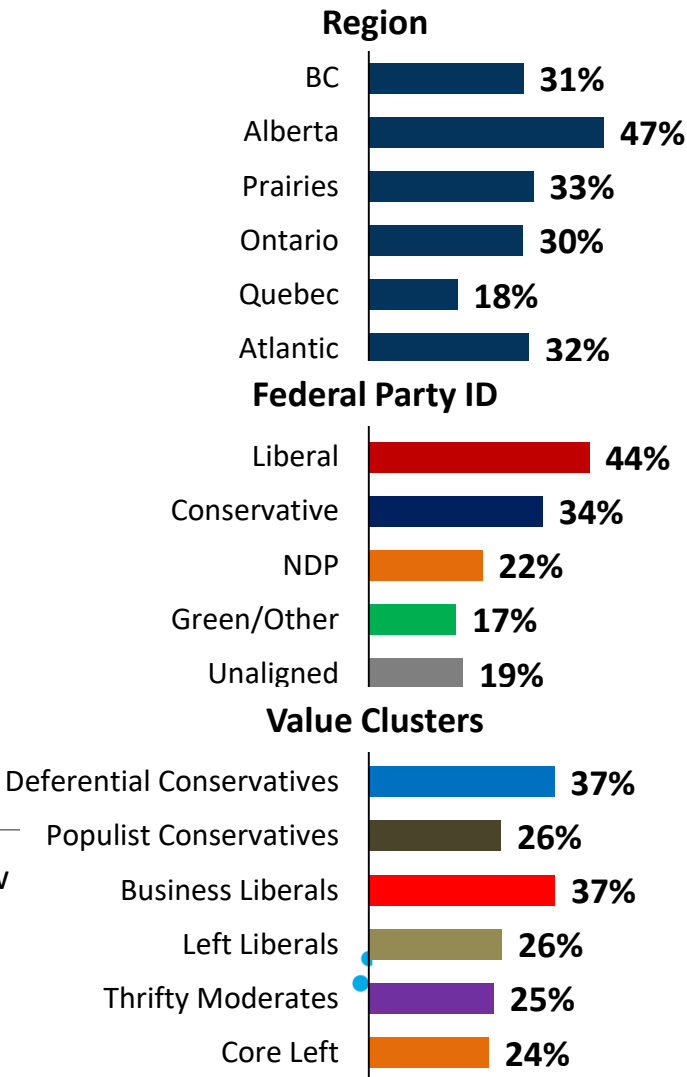
Note: First sentence was not listed as a preamble to this question in tracking waves.

Support for Purchase: More opposition than support for purchase

Q As you may be aware, the federal government recently announced that it is going to purchase the Trans Mountain pipeline from Kinder Morgan in order to ensure that the expansion is built. Thinking about the purchase announcement, do you support or oppose the federal government decision to purchase the Trans Mountain Pipeline from Kinder Morgan?
[asked of all respondents]



September 2018 Segmentation *Those who say support*

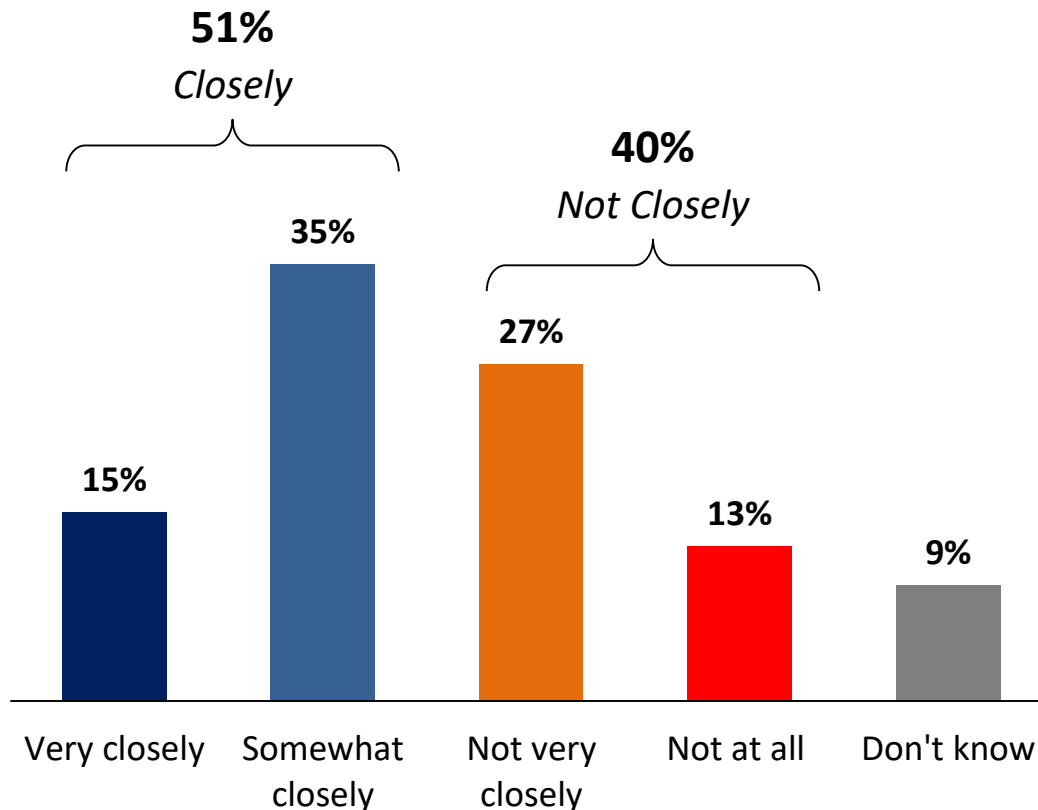


Attention to Review: Significant western skew in attention

Q

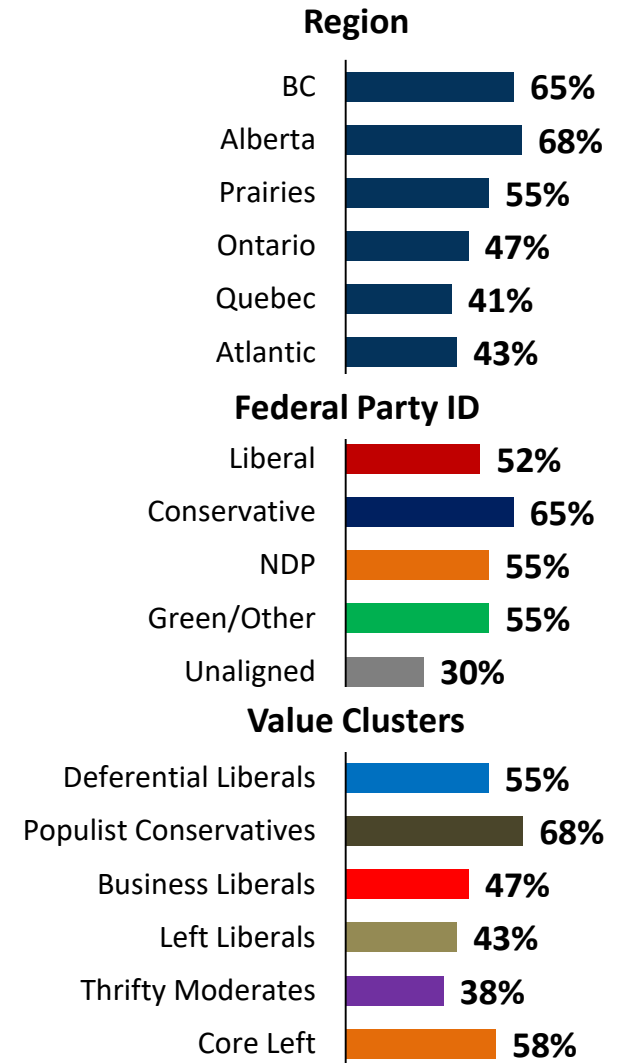
In August, the courts ruled that the regulatory review of the Trans Mountain pipeline was flawed and that the federal government failed in its duty to engage in meaningful consultation with First Nations before approving the project. How closely have you been following the news about the federal government's decision on this oil pipeline expansion project in Canada?

[asked of all respondents]



Sample Breakdown ►►

Those who say "closely"

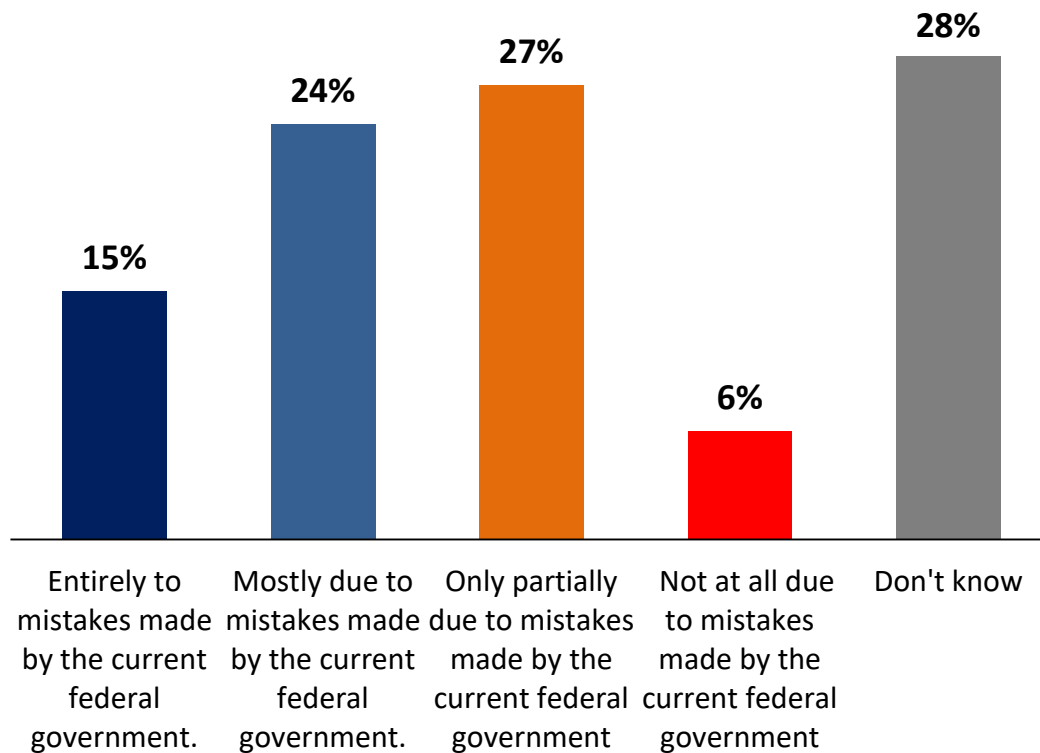


Federal Court Loss: Most who blame Liberals unlikely to vote for them⁵⁴ for them

Q

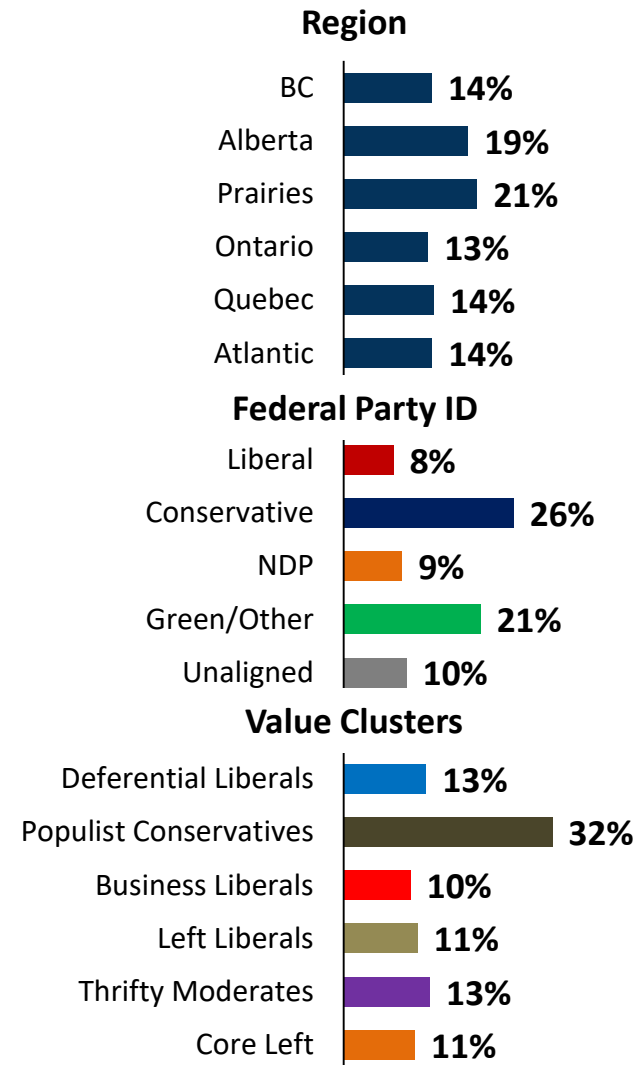
To what degree do you feel the judgement against the federal government was due to failures of the current federal Liberal government. Do you feel the federal government's loss in the courts was due ...

[asked of all respondents]



Sample Breakdown ►►

Those who say "Entirely federal govt"

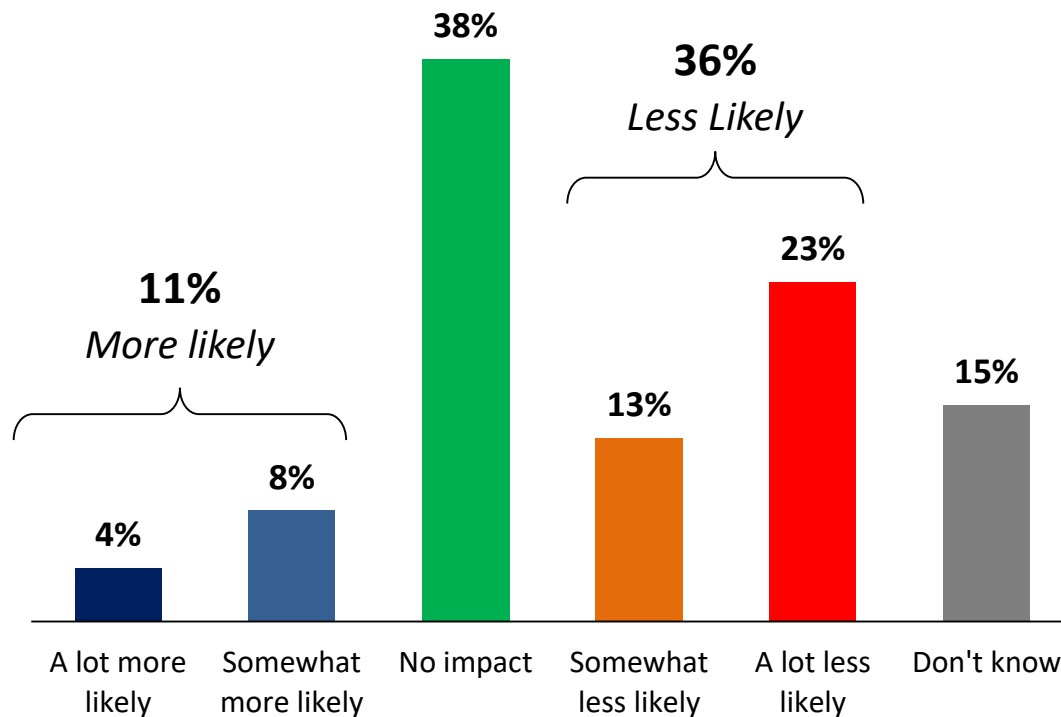


Likelihood to vote Liberal: By a 3-in-1 margin, respondents less likely to vote Liberal after govt's handling of pipeline

Q

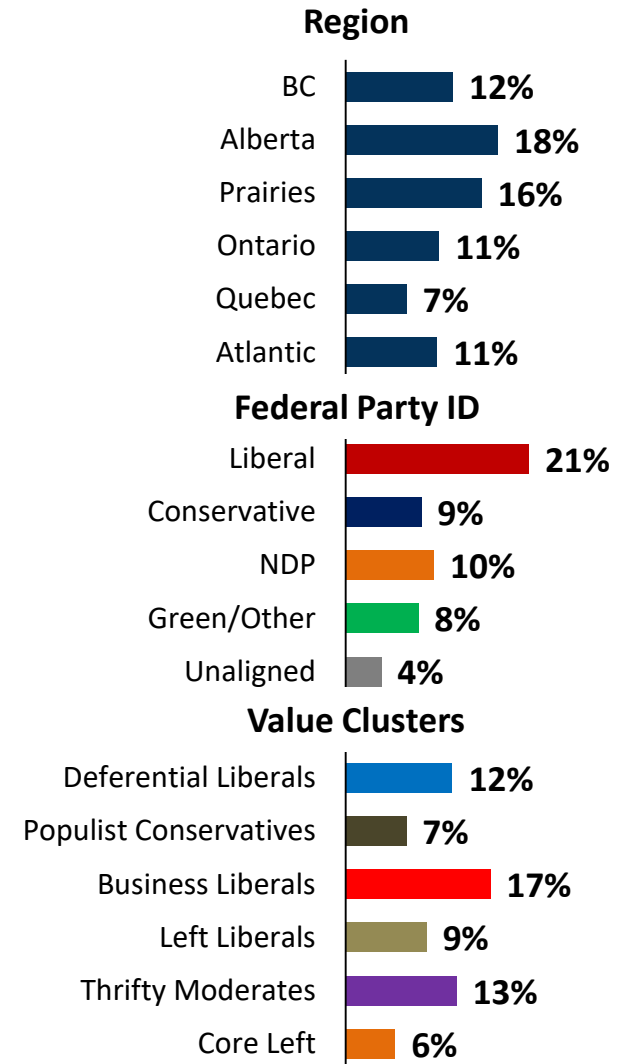
Thinking overall about the Kinder Morgan pipeline issue, has the federal government's handling of the issue left you feeling more or less likely to vote for the Liberal party in the 2019 Federal Election?

[asked of all respondents]



Sample Breakdown ►►

Those who say "More likely"





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