No Margin for Error
Public Opinion Research

February 11th, 2019
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</table>
Provincial Landscape: The UPC (41%) has a significant lead over the NDP (27%) while the Liberals, Alberta Party, and Greens are all below 10%

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

[Showing the results of the last three CTM surveys; combined n=1,100]
If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE+LEAN]

[Showing the results of the last 3 CTM surveys]

**Calgary [n=348]**
- Liberal: 10%
- United Conservative: 41%
- NDP: 26%
- Alberta Party: 8%
- Green: 2%
- Other: 9%
- Undecided/ Don't know: 3%
- Would not vote/ None: 2%

**Edmonton [n=349]**
- Liberal: 9%
- United Conservative: 31%
- NDP: 36%
- Alberta Party: 7%
- Green: 4%
- Other: 1%
- Undecided/ Don't know: 11%
- Would not vote/ None: 2%

**Small Cities/Rural [n=403]**
- Liberal: 3%
- United Conservative: 50%
- NDP: 22%
- Alberta Party: 8%
- Green: 1%
- Other: 1%
- Undecided/ Don't know: 8%
- Would not vote/ None: 2%
**Notley’s Impact:** Albertans were most likely to cite the carbon tax as something Notley has done that negatively impacted them.

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Introduction of Carbon tax</td>
<td>22%</td>
</tr>
<tr>
<td>Taxes</td>
<td>6%</td>
</tr>
<tr>
<td>Pipelines</td>
<td>4%</td>
</tr>
<tr>
<td>Alberta debt / deficit</td>
<td>4%</td>
</tr>
<tr>
<td>Oil and gas industry</td>
<td>3%</td>
</tr>
<tr>
<td>Provincial government negative</td>
<td>2%</td>
</tr>
<tr>
<td>Economy, economic opportunities</td>
<td>2%</td>
</tr>
<tr>
<td>Unemployment / job loss</td>
<td>1%</td>
</tr>
<tr>
<td>Oil prices and production</td>
<td>1%</td>
</tr>
<tr>
<td>Cost of Living</td>
<td>1%</td>
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<tr>
<td>Wasteful spending</td>
<td>1%</td>
</tr>
<tr>
<td>Health care, general</td>
<td>1%</td>
</tr>
<tr>
<td>Minimum Wage Increase</td>
<td>1%</td>
</tr>
<tr>
<td>Environment, pollution</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>None</td>
<td>22%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>22%</td>
</tr>
</tbody>
</table>

If you are able, please list at least one way Alberta’s Premier Rachel Notley and the provincial government have made things **better for you and your family.** [asked of all respondents in Alberta, January 2019; n=300 coded]

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Health Care</td>
<td>4%</td>
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<tr>
<td>Taxes / tax rebates / tax programs</td>
<td>2%</td>
</tr>
<tr>
<td>Government / premier - positive</td>
<td>2%</td>
</tr>
<tr>
<td>Pipeline / Trans Mountain</td>
<td>2%</td>
</tr>
<tr>
<td>Care for Environment</td>
<td>2%</td>
</tr>
<tr>
<td>Adopting Carbon tax</td>
<td>1%</td>
</tr>
<tr>
<td>Education</td>
<td>1%</td>
</tr>
<tr>
<td>Carbon tax rebate</td>
<td>1%</td>
</tr>
<tr>
<td>Oil and gas</td>
<td>1%</td>
</tr>
<tr>
<td>Government / premier - negative</td>
<td>1%</td>
</tr>
<tr>
<td>Funding programs</td>
<td>1%</td>
</tr>
<tr>
<td>Increased minimum wage</td>
<td>1%</td>
</tr>
<tr>
<td>Climate change and energy initiatives</td>
<td>1%</td>
</tr>
<tr>
<td>More jobs</td>
<td>1%</td>
</tr>
<tr>
<td>Economy</td>
<td>1%</td>
</tr>
<tr>
<td>Infrastructure / roads</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
<tr>
<td>None</td>
<td>44%</td>
</tr>
<tr>
<td>Don’t Know</td>
<td>27%</td>
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</table>
Political Attitudes: 41% of respondents in Alberta strongly agree that it is time for a change in government

Do you agree or disagree with the following statements? [asked of all respondents; results of a December 2018 survey; n=500]

- Alberta politics is really a two-horse race, only the United Conservative Party and the NDP have a real chance of forming government.
  - Strongly agree: 22%
  - Somewhat agree: 36%
  - Neither agree nor disagree: 19%
  - Somewhat disagree: 10%
  - Strongly disagree: 5%
  - Don't know: 7%
  - Net Agreement: +43%

- It’s time for a change in government here in Alberta.
  - Strongly agree: 41%
  - Somewhat agree: 18%
  - Neither agree nor disagree: 14%
  - Somewhat disagree: 8%
  - Strongly disagree: 15%
  - Don't know: 4%
  - Net Agreement: +36%

- The United Conservative Party is too extreme for me.
  - Strongly agree: 26%
  - Somewhat agree: 16%
  - Neither agree nor disagree: 17%
  - Somewhat disagree: 12%
  - Strongly disagree: 22%
  - Don't know: 8%
  - Net Agreement: +7%

- The NDP may have its problems, but it is still the party best able to run the government here in Alberta.
  - Strongly agree: 17%
  - Somewhat agree: 18%
  - Neither agree nor disagree: 17%
  - Somewhat disagree: 7%
  - Strongly disagree: 36%
  - Don't know: 5%
  - Net Agreement: -8%
Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

How about ...

[asked of all respondents in Alberta; results of a December 2018 survey; n=500]

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</thead>
<tbody>
<tr>
<td>Jason Kenney</td>
<td>19%</td>
<td>17%</td>
<td>20%</td>
<td>17%</td>
<td>12%</td>
<td>21%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Rachel Notley</td>
<td>17%</td>
<td>24%</td>
<td>11%</td>
<td>19%</td>
<td>15%</td>
<td>15%</td>
<td>12%</td>
<td>15%</td>
</tr>
<tr>
<td>David Khan</td>
<td>3%</td>
<td>11%</td>
<td>6%</td>
<td>11%</td>
<td>5%</td>
<td>16%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Leadership Favourable Tracking: Between January and December, 2018, Kenney has declined in popularity while Notley has improved.
Best Premier: Notley (28%) trails Kenney (31%) closely as respondents choice for best Premier; 21% are undecided

Which of the following leaders would make the best Premier of Alberta?
[asked of all respondents; results of a December 2018 survey; n=500]
Ontario Politics
Satisfaction with Outcome: Respondents much less satisfied with the election outcome than in 2003 when McGuinty was first election

As you may know, as a result of the provincial election held on June 7th, the Progressive Conservative party will be forming the government with the majority of seats in the Ontario legislature. Generally speaking, how satisfied are you with the outcome of the election...very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied?

[asked of all respondents; results from the June 2018 OTM telephone survey; n=600]
If a provincial 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 in Ontario; January CTM; n=600]
Thinking about politics in Ontario, generally speaking, do you usually think of yourself as a...
[asked of all respondents in Ontario]
Decided Vote Tracking by Party ID: Liberal rebound simply a function of brand loyalty, still room for Liberal growth

[January 2019] If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED VOTE]

[Post election (June 2018)] Thinking about the choices available in your riding, which party’s candidate did you vote for? [Among those who recall who they voted for]

BY Party ID

[only decided voters in Ontario; January 2019 CTM]
Past Vote and Impact: Ford’s impact so far viewed negatively, but less negatively than Wynne’s in 2017

Thinking back to the [ELECTION DATE] provincial election, which political party and leader did you vote for?
[asked of all respondents in Ontario; n=600; showing results from December 2018 compared to results from CTM March 2017]

- Wynne/Liberals: 23% (June 7, 2018) vs. 24% (June 12, 2014)
- Horwath/NDP: 15% (June 7, 2018) vs. 24% (June 12, 2014)
- Ford*/PC: 36% (June 7, 2018) vs. 28% (June 12, 2014)
- Another party: 2% (June 7, 2018) vs. 3% (June 12, 2014)
- Don’t know: 5% (June 7, 2018) vs. 7% (June 12, 2014)
- Non-voter: 14% (June 7, 2018) vs. 11% (June 12, 2014)

Since that election, has [PREMIER] changed Ontario for the better, changed for the worse, or stayed pretty much the same?
[asked of all respondents in Ontario; n=600; showing results from December 2018 compared to results from CTM March 2017]

- Changed for the better: 22% (Doug Ford) vs. 8% (Kathleen Wynne)
- Stayed the same: 20% (Doug Ford) vs. 21% (Kathleen Wynne)
- Changed for the worse: 52% (Doug Ford) vs. 66% (Kathleen Wynne)
- Don’t know: 6% (Doug Ford) vs. 4% (Kathleen Wynne)

*For 2014, Hudak was the PC candidate
Ford’s Impact: Fiscal issues driving government image. Positives come from tax and spending cuts, negatives come from mostly from benefit cuts.

If you are able, please list at least one way Ontario’s Premier Doug Ford and the provincial government have made things **better for you and your family**. [asked of all respondents in Ontario, n=600 coded]

- Eliminating carbon tax/cap and trade/green energy projects: 5%
- Lower gas prices/taxes: 3%
- Cutting spending/trying to reduce deficit: 3%
- Tuition/OSAP changes: 2%
- Lower taxes: 2%
- Scrapping drive clean program: 1%
- Hydro changes (lower bills, firing CEO): 1%
- Cutting city council: 1%
- Stopping minimum wage hike: 1%
- Sex ed: 1%
- Other: 6%
- None: 51%
- Don’t Know: 23%

If you are able, please list at least one way Ontario’s Premier Doug Ford and the provincial government have made things **worse for you and your family**. [asked of all respondents in Ontario, n=600 coded]

- Social services cuts: 9%
- Cuts to tuition/OSAP: 8%
- Negative comments: 4%
- Cancelling minimum wage hike/basic income: 3%
- Cancelling environmental/climate change initiatives/rebates: 3%
- Changes to labour laws (ie cut sick days): 2%
- Cancelling new sex ed curriculum: 2%
- Cancelling carbon tax/cap and trade: 2%
- Cutting city council: 1%
- Cost of living: 1%
- Marijuana laws: 1%
- Taxes: 1%
- Greenbelt development: 1%
- Other: 8%
- None: 28%
- Don’t Know: 23%
Federal Horserace
2015 versus Now: Today’s overall landscape looks quite similar to 2015, but with a softened NDP and stronger third parties

2015 Election Results
- Liberal: 39%
- Conservative: 32%
- NDP: 20%
- Green: 3%
- Bloc: 5%
- People's Party: 4%
- Other: 5%

November-January Polling Average
- Liberal: 37%
- Conservative: 32%
- NDP: 13%
- Green: 8%
- Bloc: 5%
- People's Party: 4%
- Other: 5%

Decided Vote
[Showing the results of the last three CTM surveys; combined n=3,154]
Federal Decided Vote – January 2019: In January, the Liberals lead at 38% nationally, followed by the Conservatives at 32%.

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]

[Showing the results of the January CTM; n=1,026]

<table>
<thead>
<tr>
<th>Region</th>
<th>Conservative</th>
<th>Liberal</th>
<th>NDP</th>
<th>Bloc</th>
<th>Green</th>
<th>Peoples Party</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>32%</td>
<td>38%</td>
<td>12%</td>
<td>5%</td>
<td>8%</td>
<td>4%</td>
<td>1%</td>
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<tr>
<td>BC</td>
<td>29%</td>
<td>36%</td>
<td>19%</td>
<td>12%</td>
<td>3%</td>
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<tr>
<td>Alberta</td>
<td>55%</td>
<td>26%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>1%</td>
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<tr>
<td>Prairies</td>
<td>31%</td>
<td>36%</td>
<td>15%</td>
<td>8%</td>
<td>8%</td>
<td>3%</td>
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<tr>
<td>Ontario</td>
<td>34%</td>
<td>45%</td>
<td>12%</td>
<td>6%</td>
<td>4%</td>
<td></td>
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</tr>
<tr>
<td>Quebec</td>
<td>20%</td>
<td>33%</td>
<td>10%</td>
<td>21%</td>
<td>9%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Atlantic</td>
<td>30%</td>
<td>43%</td>
<td>7%</td>
<td>14%</td>
<td>6%</td>
<td>0%</td>
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</tbody>
</table>

Conservative | Liberal | NDP | Bloc | Green | Peoples Party | Other |
Federal Decided Vote – December 2018: Liberals ahead nationally and in every region except Alberta and the Prairies

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] [Showing the results of the January CTM; n=1,060]

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<tbody>
<tr>
<td>Conservative</td>
<td>33%</td>
<td>29%</td>
<td>52%</td>
<td>45%</td>
<td>35%</td>
<td>21%</td>
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<tr>
<td>Liberal</td>
<td>36%</td>
<td>33%</td>
<td>26%</td>
<td>22%</td>
<td>43%</td>
<td>30%</td>
<td>48%</td>
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<tr>
<td>NDP</td>
<td>15%</td>
<td>16%</td>
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<td>25%</td>
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<td>18%</td>
<td>11%</td>
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<tr>
<td>Bloc</td>
<td>5%</td>
<td>18%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>21%</td>
<td>11%</td>
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<tr>
<td>Green</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
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<tr>
<td>Peoples Party</td>
<td>4%</td>
<td>4%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
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<tr>
<td>Other</td>
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<td>1%</td>
<td>1%</td>
<td>4%</td>
<td>3%</td>
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</table>
Federal Decided Vote – November 2018: Liberals lead by 6 points overall; in Ontario the Liberals are head by 10 points

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]

[Showing the results of the January CTM; n=1,069]

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<tr>
<td></td>
<td>32%</td>
<td>26%</td>
<td>52%</td>
<td>37%</td>
<td>34%</td>
<td>23%</td>
<td>27%</td>
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<tr>
<td></td>
<td>38%</td>
<td>39%</td>
<td>28%</td>
<td>36%</td>
<td>44%</td>
<td>34%</td>
<td>41%</td>
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<tr>
<td></td>
<td>14%</td>
<td>17%</td>
<td>12%</td>
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<td>8%</td>
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<tr>
<td><strong>Conservative</strong></td>
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<tr>
<td><strong>Liberal</strong></td>
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<tr>
<td><strong>NDP</strong></td>
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<tr>
<td><strong>Bloc</strong></td>
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<tr>
<td><strong>Green</strong></td>
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<tr>
<td><strong>Peoples Party</strong></td>
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<tr>
<td><strong>Other</strong></td>
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</table>
Combined Vote: Liberals lead the Conservatives by 5 points among all voters but 9% are still undecided

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]
Respondents were grouped together into their Federal electoral districts based on the first three digits of their postal code. The electoral districts were then grouped geographically into subregions within the larger divisions of the country. A weighted total of 53 respondents could not be grouped into a federal electoral district because the first three digits of their postal code matched multiple districts.

This section shows the results of the most important subregions (i.e. those with the most seats that were won by a narrow margin in the last election) now compared to the last election. It also highlights how many of the seats in those regions were won by each party and, within that, how many of each party’s seats were won by a margin of less than 10 points. Because of the small sample in each subregion, the results of the last three Canada This Month surveys have been pooled together.

The table beside here shows the complete list of regions and the sample size of decided voters in each region. The total weighted n-size of decided voters matched to electoral districts is 3,101.

<table>
<thead>
<tr>
<th>Region</th>
<th>Subregion</th>
<th>N-Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantic Canada</td>
<td>Urban Atlantic</td>
<td>93</td>
</tr>
<tr>
<td></td>
<td>Rural Atlantic</td>
<td>102</td>
</tr>
<tr>
<td>Quebec</td>
<td>Quebec City Area</td>
<td>116</td>
</tr>
<tr>
<td></td>
<td>Francophone Quebec</td>
<td>230</td>
</tr>
<tr>
<td></td>
<td>Francophone Montreal/Suburbs</td>
<td>169</td>
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<tr>
<td></td>
<td>Quebec: Anglophone or Mixed</td>
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</tr>
<tr>
<td>Ontario</td>
<td>Toronto</td>
<td>257</td>
</tr>
<tr>
<td></td>
<td>GTA Suburbs</td>
<td>305</td>
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<tr>
<td></td>
<td>South/West</td>
<td>326</td>
</tr>
<tr>
<td></td>
<td>North/East</td>
<td>326</td>
</tr>
<tr>
<td>Prairies</td>
<td>Winnipeg/Saskatoon/Regina</td>
<td>137</td>
</tr>
<tr>
<td></td>
<td>Rest of Prairies</td>
<td>66</td>
</tr>
<tr>
<td>Alberta</td>
<td>Calgary/Edmonton</td>
<td>197</td>
</tr>
<tr>
<td></td>
<td>Rest of Alberta</td>
<td>152</td>
</tr>
<tr>
<td>BC</td>
<td>City of Vancouver</td>
<td>69</td>
</tr>
<tr>
<td></td>
<td>Vancouver Suburbs</td>
<td>160</td>
</tr>
<tr>
<td></td>
<td>Fraser Valley</td>
<td>36</td>
</tr>
<tr>
<td></td>
<td>Vancouver Island</td>
<td>72</td>
</tr>
<tr>
<td></td>
<td>Rest of BC</td>
<td>85</td>
</tr>
<tr>
<td>Territories</td>
<td>Territories</td>
<td>5</td>
</tr>
</tbody>
</table>
Vancouver Suburbs: Liberals virtually unchanged as the NDP fell from 22% to 16%

Decided Vote
[Showing the results of the last three CTM surveys; combined n=160]

<table>
<thead>
<tr>
<th>Party</th>
<th>Current Seats</th>
<th>Close Seats (won by &lt;10 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>11</td>
<td>4</td>
</tr>
<tr>
<td>CPC</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>NDP</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

2015 Election Results
- Liberal: 43%
- Conservative: 30%
- NDP: 22%
- Green: 4%

November-January Polling Average
- Liberal: 40%
- Conservative: 29%
- NDP: 16%
- Green: 11%
- Other: 3%

Map showing distribution of seats.
Suburban GTA: Slight Liberal lead from 2015 has evaporated; Liberals (41%) and Conservatives (40%) are now tied

[Map showing a slight Liberal lead from 2015]

<table>
<thead>
<tr>
<th>Party</th>
<th>Current Seats</th>
<th>Close Seats (won by &lt;10 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>24</td>
<td>12</td>
</tr>
<tr>
<td>CPC</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>NDP</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Decided Vote
[Showing the results of the last three CTM surveys; combined n=305]
Ontario South/West: Liberals have gained slightly while the NDP have fallen from 21% to 13%

2015 Election Results

- Liberal: 37%
- Conservative: 37%
- NDP: 21%
- Other: 3%

November-January Polling Average

- Liberal: 40%
- Conservative: 37%
- NDP: 13%
- Other: 8%

Decided Vote

[Showing the results of the last three CTM surveys; combined n=326]

<table>
<thead>
<tr>
<th>Party</th>
<th>Current Seats</th>
<th>Close Seats (won by &lt;10 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>CPC</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>NDP</td>
<td>6</td>
<td>3</td>
</tr>
</tbody>
</table>
Ontario North/East: Vote for the Liberals and Conservatives is stable since 2015; NDP are down to 10% as Green Party is up to 7%

Decided Vote
[Showing the results of the last three CTM surveys; combined n=326]

<table>
<thead>
<tr>
<th>Party</th>
<th>Current Seats</th>
<th>Close Seats (won by &lt;10 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>20</td>
<td>6</td>
</tr>
<tr>
<td>CPC</td>
<td>13</td>
<td>8</td>
</tr>
<tr>
<td>NDP</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

2015 Election Results
- Liberal: 45%
- Conservative: 35%
- NDP: 16%
- Green: 4%

November-January Polling Average
- Liberal: 43%
- Conservative: 36%
- NDP: 10%
- Green: 7%
- People's Party: 3%
- Other: 3%
Rural Francophone Quebec: Liberal and NDP decline since 2015 has resulted in a four way race for rural francophone voters

Decided Vote
[showing the results of the last three CTM surveys; combined n=230]

2015 Election Results

<table>
<thead>
<tr>
<th>Party</th>
<th>Current Seats</th>
<th>Close Seats (won by &lt;10 points)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>CPC</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>NDP</td>
<td>9</td>
<td>6</td>
</tr>
<tr>
<td>Bloc</td>
<td>4</td>
<td>2</td>
</tr>
</tbody>
</table>

2015 Election Results

- Liberal: 33%
- Conservative: 13%
- NDP: 28%
- Bloc: 2%
- Other: 23%
- Green: 8%
- People's Party: 5%

November-January Polling Average

- Liberal: 25%
- Conservative: 20%
- NDP: 17%
- Bloc: 8%
- Other: 23%
- Green: 5%

Map showing rural Francophone Quebec areas with Liberal and NDP decline since 2015.
Rural Atlantic Canada: Liberals (40%) are down over 20 points since 2015, but still lead the Conservatives (25%).
Party Brands
Federal ID, Quebec vs. RoC: Liberals lead both inside and outside Quebec; Conservatives 2nd in RoC, but trail the BQ in Quebec

Thinking about politics in CANADA, generally speaking, do you usually think of yourself as a...

[Showing the results of the last three CTM surveys, combined n=3,600]
Q  Thinking about politics in CANADA, generally speaking, do you usually think of yourself as a... [Showing the results of the last three CTM surveys, combined n=3,600]

Federal ID, Quebec vs. Rural Francophone: While Liberals lead by a solid margin overall, in rural francophone seats they only lead by 4 points

**Quebec**

- CPC: 15%
- Liberal: 27%
- NDP: 8%
- Bloc Quebecois: 17%
- Green: 5%
- People's Party: 2%
- Other: 1%
- None/Independent: 14%
- Don't know: 11%

n=840

**Rural Francophone**

- CPC: 13%
- Liberal: 21%
- NDP: 9%
- Bloc Quebecois: 17%
- Green: 6%
- People's Party: 3%
- Other: 2%
- None/Independent: 16%
- Don't know: 13%

n=277
Federal ID, RoC vs. Key Regions: Liberal ahead on Party ID in all key subregions, but only narrowly in the GTA Suburbs

Thinking about politics in CANADA, generally speaking, do you usually think of yourself as a...

[Showing the results of the last three CTM surveys, combined n=3,600]
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 …?  

[asked of all respondents, results of the September 2018 CTM survey; n=1,200]

Representing Canada on the world stage: 38% The Liberal party, 26% The Conservative party, 15% The New Democratic Party, 9% The Bloc Quebecois, 3% The Greens, 2% People’s Party of Canada, 2% Would not vote/None/Nobody

Promoting equal rights for women: 36% The Liberal party, 13% The Conservative party, 15% The New Democratic Party, 3% The Bloc Quebecois, 5% The Greens, 2% People’s Party of Canada, 4% Would not vote/None/Nobody

Dealing with the issue of refugees: 30% The Liberal party, 24% The Conservative party, 11% The New Democratic Party, 3% The Bloc Quebecois, 3% The Greens, 4% People’s Party of Canada, 5% Would not vote/None/Nobody

Protecting civil liberties: 29% The Liberal party, 19% The Conservative party, 15% The New Democratic Party, 3% The Bloc Quebecois, 4% The Greens, 3% People’s Party of Canada, 6% Would not vote/None/Nobody

Aboriginal issues: 28% The Liberal party, 13% The Conservative party, 14% The New Democratic Party, 5% The Bloc Quebecois, 3% The Greens, 3% People’s Party of Canada, 6% Would not vote/None/Nobody

Creating jobs: 27% The Liberal party, 27% The Conservative party, 12% The New Democratic Party, 3% The Bloc Quebecois, 3% The Greens, 3% People’s Party of Canada, 8% Would not vote/None/Nobody

Health: 26% The Liberal party, 20% The Conservative party, 18% The New Democratic Party, 3% The Bloc Quebecois, 3% The Greens, 3% People’s Party of Canada, 5% Would not vote/None/Nobody

Protecting Canadians from terrorism: 23% The Liberal party, 31% The Conservative party, 6% The New Democratic Party, 3% The Bloc Quebecois, 3% The Greens, 2% People’s Party of Canada, 7% Would not vote/None/Nobody

Responding to the unique needs of my province: 22% The Liberal party, 21% The Conservative party, 13% The New Democratic Party, 9% The Bloc Quebecois, 3% The Greens, 3% People’s Party of Canada, 6% Would not vote/None/Nobody

Crime: 21% The Liberal party, 32% The Conservative party, 13% The New Democratic Party, 10% The Bloc Quebecois, 2% The Greens, 3% People’s Party of Canada, 6% Would not vote/None/Nobody

Environment: 18% The Liberal party, 14% The Conservative party, 12% The New Democratic Party, 2% The Bloc Quebecois, 31% The Greens, 2% People’s Party of Canada, 5% Would not vote/None/Nobody

Cutting taxes: 15% The Liberal party, 33% The Conservative party, 10% The New Democratic Party, 2% The Bloc Quebecois, 3% The Greens, 3% People’s Party of Canada, 10% Would not vote/None/Nobody
Economic Attitudes
Segmentation Attitudes: 51% of Canadians agree that no matter how hard they work, it’s more difficult every year to get by

Q Now turning to a different subject... Do you agree or disagree with the following statements? [asked of all respondents; n=1,200]

Here in [PROVINCE] you can be anything you want if you are willing to work for it

- Strongly agree: 21%
- Somewhat agree: 39%
- Neither agree nor disagree: 17%
- Somewhat disagree: 13%
- Strongly disagree: 7%
- Don't know: 3%

No matter how hard I work, every year it seems more difficult to get by

- Strongly agree: 21%
- Somewhat agree: 30%
- Neither agree nor disagree: 22%
- Somewhat disagree: 15%
- Strongly disagree: 9%
- Don't know: 3%
Gap Segmentation: 1-in-5 Canadians do not believe in the Canadian Dream

Gap segmentation: 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”.

- Don’t believe in Canadian Dream
- Alienated 20%
- Ambivalent 20%
- Neutral or don’t know on Canadian Dream
- Believe in Canadian Dream, moderately struggling to get by
- Canadian Dream Achievers 19%
- Canadian Dream Hopefuls 13%
- Canadian Dream Moderate Strugglers 18%
- Believe in Canadian Dream, not struggling to get by
- Believe in Canadian Dream, moderately struggling to get by
- Believe in Canadian Dream, moderately struggling to get by
- Believe in Canadian Dream, no opinion on “struggling to get by”
- Don’t believe in Canadian Dream
- Believe in Canadian Dream, find it very difficult to get by

Q
Vote by Segment: Liberals lead among all groups except Canadian Dream Moderate and Heavy Strugglers, where the CPC is slightly ahead.

<table>
<thead>
<tr>
<th>Column %</th>
<th>Overall</th>
<th>Canadian Dream Achievers</th>
<th>Canadian Dream Hopefuls</th>
<th>Canadian Dream Moderate Strugglers</th>
<th>Canadian Dream Heavy Strugglers</th>
<th>Ambivalent</th>
<th>Alienated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Liberal</td>
<td>33%</td>
<td>44%</td>
<td>34%</td>
<td>31%</td>
<td>25%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Conservative</td>
<td>27%</td>
<td>29%</td>
<td>32%</td>
<td>35%</td>
<td>27%</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>NDP</td>
<td>10%</td>
<td>6%</td>
<td>6%</td>
<td>11%</td>
<td>13%</td>
<td>9%</td>
<td>16%</td>
</tr>
<tr>
<td>Bloc Quebecois</td>
<td>4%</td>
<td>4%</td>
<td>4%</td>
<td>5%</td>
<td>8%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Green Party</td>
<td>7%</td>
<td>4%</td>
<td>6%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>People’s Party</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Undecided/DK</td>
<td>11%</td>
<td>8%</td>
<td>9%</td>
<td>7%</td>
<td>14%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Would not vote/None</td>
<td>4%</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
<td>4%</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Values
Free Enterprise: Building the Index

**Q** Is the main role of government to...?

- 61% To create equal opportunity so that everyone can compete on their own to be the best they can be
- 47% To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own
- 11% Don't Know

**Q** Which of the following statements comes closest to your view?

- 36% The profit system brings out the worst in human nature.
- 47% The profit system teaches people the value of hard work and success.
- 17% Don't Know
Respondents were far more likely to be pro-free enterprise than against it, with net +23% high on the Index.
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]

By Free Enterprise Index (2 questions):

- Agree: Role of government is to create equal opportunity
- Agree: Profit system teaches the value of hard work
Free Enterprise Index by Key Region: While all regions are pro-free enterprise, Rural Atlantic is least so with 27% very low on the index.
Fiscal Conservativism: Slight majority of respondents are fiscally liberal; 43% of fiscal liberals say they would vote for the Liberals

When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...

- Their ability to afford the programs and services: 36%
- The public's need for the programs and services: 54%
- Don't Know: 10%

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]

BY Fiscal Conservativism:
Fiscal Conservativism by Key Region: The GTA and Rural Atlantic region are the most fiscally conservative key regions

When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...

- Their ability to afford the programs and services
- The public's need for the programs and services
- Don't Know

### National

- 54% Don't Know
- 36% Their ability to afford the programs and services
- 10% The public's need for the programs and services

### Regional Breakdown

- **Vancouver Suburbs**
  - 34% Don't Know
  - 57% The public's need for the programs and services
  - 9% Their ability to afford the programs and services

- **Ontario North/East**
  - 36% Don't Know
  - 53% The public's need for the programs and services
  - 10% Their ability to afford the programs and services

- **Ontario South/West**
  - 37% Don't Know
  - 56% The public's need for the programs and services
  - 7% Their ability to afford the programs and services

- **GTA Suburbs**
  - 43% Don't Know
  - 44% The public's need for the programs and services
  - 13% Their ability to afford the programs and services

- **Rural Francophone Quebec**
  - 37% Don't Know
  - 54% The public's need for the programs and services
  - 9% Their ability to afford the programs and services

- **Rural Atlantic Canada**
  - 49% Don't Know
  - 45% The public's need for the programs and services
  - 6% Their ability to afford the programs and services
### Authoritarianism: Building the Index

Do you agree or disagree with the following statements?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
<th>Net Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everything is changing too fast today</td>
<td>17%</td>
<td>29%</td>
<td>27%</td>
<td>15%</td>
<td>9%</td>
<td>4%</td>
<td>+23%</td>
</tr>
<tr>
<td>What this country needs is strong, determined leaders who will destroy the negative forces that have taken us from our true path and silence the trouble makers spreading bad ideas</td>
<td>16%</td>
<td>25%</td>
<td>21%</td>
<td>12%</td>
<td>18%</td>
<td>7%</td>
<td>+11%</td>
</tr>
<tr>
<td>Our country will be great if we honor the ways of our forefathers, do what the authorities tell us to do, and get rid of the ‘rotten apples’ who are ruining everything</td>
<td>14%</td>
<td>23%</td>
<td>22%</td>
<td>15%</td>
<td>20%</td>
<td>6%</td>
<td>+2%</td>
</tr>
<tr>
<td>The ‘old-fashioned ways’ and ‘old-fashioned values’ still show the best way to live</td>
<td>13%</td>
<td>22%</td>
<td>22%</td>
<td>21%</td>
<td>18%</td>
<td>4%</td>
<td>-3%</td>
</tr>
</tbody>
</table>
Authoritarianism Index

37% of respondents are at least somewhat authoritarian.
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]

**Authoritarian Index (4 questions):**

- Agree: Honour ways of forefathers, do what authorities tell us and get rid of rotten apples
- Agree: Old-fashioned ways and values still best way to live
- Agree: Country needs strong leader to destroy negative forces, silence troublemakers spreading bad ideas
- Agree: Everything is changing too fast today

### Combined Vote by Authoritarianism:

Over half of those who are very low on the Authoritarian Index would vote Liberal.

<table>
<thead>
<tr>
<th>Authoritarian</th>
<th>Conservative</th>
<th>Liberal</th>
<th>NDP</th>
<th>Bloc Quebecois</th>
<th>Green/Other</th>
<th>People's Party</th>
<th>Unaligned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very low</td>
<td>11%</td>
<td>17%</td>
<td>11%</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Low</td>
<td>21%</td>
<td>42%</td>
<td>8%</td>
<td>5%</td>
<td>5%</td>
<td>10%</td>
<td>0%</td>
</tr>
<tr>
<td>Medium</td>
<td>26%</td>
<td>29%</td>
<td>11%</td>
<td>7%</td>
<td>3%</td>
<td>19%</td>
<td>0%</td>
</tr>
<tr>
<td>Medium High</td>
<td>35%</td>
<td>27%</td>
<td>8%</td>
<td>5%</td>
<td>8%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>High</td>
<td>41%</td>
<td>21%</td>
<td>9%</td>
<td>2%</td>
<td>5%</td>
<td>15%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Authoritarianism Index by Key Region: The GTA Suburbs and Rural Francophone Quebec are both far more authoritarian than the nation.
Nativism: Building the Index

Which of the following statements best describes your personal point of view?

39% The growing number of newcomers from other countries threaten traditional Canadian/American customs and values

47% The growing number of newcomers from other countries strengthens Canadian/American society

14% Don't Know

Do you agree or disagree with the following statements?

- Immigrants should adapt to Canadian society and not the other way around: 42% Strongly agree, 29% Somewhat agree, 16% Neither agree nor disagree, 10% Somewhat disagree, 14% Strongly disagree, 7% Don't know. Net Agreement: +61%

- All Canadians should have the freedom to wear any item of clothing associated with their religious beliefs such as a headscarf, turban or crucifix: 30% Strongly agree, 26% Somewhat agree, 16% Neither agree nor disagree, 12% Somewhat disagree, 13% Strongly disagree. Net Agreement: +31%

- Immigrants take jobs away from other Canadians: 10% Strongly agree, 14% Somewhat agree, 20% Neither agree nor disagree, 21% Somewhat disagree, 31% Strongly disagree, 4% Don't know. Net Agreement: -28%

[Net Agreement chart]

[Legend]

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree
- Don't know
Canadians are split; 38% are on the nativist end of the index, while 41% are on the multicultural end.

Net Score: -3%
Combined Vote by Nativism: 43% of those who are high on the Nativist Index would vote for the Conservative Party

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]

BY

Nativism Index (4 questions):
- Choice: The growing number of newcomers from other countries threaten traditional Canadian customs and values
- Agree: All Canadians should have freedom to wear any item of clothing associated with their religious beliefs
- Agree: Immigrants take jobs away from other Canadians
- Agree: Immigrants should adapt to Canadian society and not the other way around

Multicultural

Very low

Low

Medium

Medium High

High

Conservative  Liberal  NDP  Bloc Quebecois  Green/Other  People's Party  Unaligned

58%  16%  11%  8%  22%  46%  9%  2%  7%  2%  11%  27%  25%  9%  4%  8%  4%  24%  38%  20%  9%  6%  6%  7%  13%  13%  7%  9%  4%  6%  17%
Nativism Index by Key Region: Rural Francophone Quebec is far more nativist than the country as a whole and the other key regions.
Political Alienation: Building the Index

Q: Do you think the people in government waste a lot of the money we pay in taxes, waste some of it, or don’t waste very much of it?

- Waste a lot of the money: 47%
- Waste some of it: 40%
- Don’t waste very much of it: 7%
- Don’t know: 7%

Q: Do you agree or disagree with the following statements?

- Governments care more about special interests than they do about the average person
  - Strongly agree: 34%
  - Somewhat agree: 30%
  - Neither agree nor disagree: 18%
  - Somewhat disagree: 8%
  - Strongly disagree: 5%
  - Don’t know: 5%

  Net Agreement +51%

Q: When it comes to government decision making, which of the following statements is closest to your view?

- Too often the government listens to experts instead of common sense: 48%
- Provincial issues are complicated so government should listen to experts when it comes to policy: 36%
- Don’t know: 16%
Over 1-in-3 respondents (36%) are very high on the Alienated Index; only 6% are very low.
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]

BY

Political Alienation Index (3 questions):
- Agree: Governments care more about special interests than they do about the average person
- Agree: Too often the government listens to experts instead of common sense
- Agree: People in government waste money we pay in taxes

Combined Vote by Alienation: Liberals win a majority of support from both groups low on the Political Alienation Index
Political Alienation Index by Key Region: Political alienation is strong everywhere; strongest in Rural Francophone Quebec and Rural Atlantic Canada.
Most of the compromising that goes on in politics turns out to be bad for the public

Compromise and bargaining among politicians is necessary to make democracy work

Don't Know

The best way to make a difference is to work within the existing political system.

The best way to make a difference is to get involved with political or protest movements outside the traditional politics.

It doesn’t matter what you do, you can’t really make a difference in politics.

Don’t know
38% of respondents are very low on the Inefficacy Index while only 15% are very high.
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]

BY
Political Inefficacy Index (2 questions):
• Agree: Compromising in politics bad for the public
• Agree: No matter what you do you can’t really make a difference in politics

Combined Vote by Political Inefficacy: Those who feel less effective are more likely to vote Conservative or to be unaligned
Political Inefficacy Index by Key Region: All region are more likely to feel ineffective than effective.
Leadership
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.

[asked of all respondents, results of the September 2018 CTM survey; n=1,200]

<table>
<thead>
<tr>
<th>Leader</th>
<th>Very favourable</th>
<th>Somewhat favourable</th>
<th>Neutral/Neither favourable nor unfavourable</th>
<th>Somewhat unfavourable</th>
<th>Very unfavourable</th>
<th>DK/Do not recognize</th>
<th>Net Favourability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Trudeau</td>
<td>17%</td>
<td>28%</td>
<td>14%</td>
<td>14%</td>
<td>24%</td>
<td>3%</td>
<td>+7%</td>
</tr>
<tr>
<td>Elizabeth May</td>
<td>8%</td>
<td>21%</td>
<td>29%</td>
<td>11%</td>
<td>12%</td>
<td>19%</td>
<td>+5%</td>
</tr>
<tr>
<td>Andrew Scheer</td>
<td>9%</td>
<td>17%</td>
<td>21%</td>
<td>13%</td>
<td>15%</td>
<td>25%</td>
<td>-2%</td>
</tr>
<tr>
<td>Jagmeet Singh</td>
<td>5%</td>
<td>15%</td>
<td>28%</td>
<td>17%</td>
<td>15%</td>
<td>21%</td>
<td>-12%</td>
</tr>
<tr>
<td>Maxime Bernier</td>
<td>3%</td>
<td>10%</td>
<td>21%</td>
<td>17%</td>
<td>24%</td>
<td>25%</td>
<td>-28%</td>
</tr>
<tr>
<td>Mario Beaulieu [Quebec only]</td>
<td>3%</td>
<td>11%</td>
<td>20%</td>
<td>14%</td>
<td>12%</td>
<td>39%</td>
<td>-12%</td>
</tr>
</tbody>
</table>
Net leader favourables: Dropoff after Singh takes helm of NDP; Trudeau declining but continues to lead others

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.

---

INNOVATIVE’s 2015 Election Campaign Surveys

- Stephen Harper / Andrew Scheer
- Thomas Mulcair / Jagmeet Singh
- Justin Trudeau
- Elizabeth May
- Beaulieu / Duceppe / Ouellet / Beaulieu
- Bernier

---

**Note:** *”*: indicates a change in party leader during tracking
Best Prime Minister- Decided: Trudeau remains the most popular leader with Andrew Scheer trailing double digits

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]

<table>
<thead>
<tr>
<th>Party Leaders</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Trudeau of the Liberals</td>
<td>47%</td>
</tr>
<tr>
<td>Stephen Harper / Andrew Scheer of the Conservatives</td>
<td>29%</td>
</tr>
<tr>
<td>Thomas Mulcair / Jagmeet Singh of the NDP</td>
<td>9%</td>
</tr>
<tr>
<td>Gilles Duceppe / Martine Oullet of the Bloc Quebecois</td>
<td>8%</td>
</tr>
<tr>
<td>Elizabeth May of the Green Party</td>
<td>6%</td>
</tr>
<tr>
<td>Maxime Bernier of the People’s Party</td>
<td>2%</td>
</tr>
</tbody>
</table>

Note: ‘None’, ‘Don’t know’, ‘Refused’ not included in calculations. Duceppe asked in QC only.

INNOVATIVE’s 2015 Election Campaign Surveys

- Justin Trudeau of the Liberals
- Thomas Mulcair / Jagmeet Singh of the NDP
- Elizabeth May of the Green Party
- Stephen Harper / Andrew Scheer of the Conservatives
- Gilles Duceppe / Martine Oullet of the Bloc Quebecois
- Maxime Bernier of the People’s Party

... indicates a change in party leader during tracking
Leader Attributes Tracking: Compared to 2015 pre-writ, Trudeau makes major gains on leadership & competence

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]

(results from the September 2018 CTM survey)

<table>
<thead>
<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Strong leadership</td>
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<tr>
<td>Justin Trudeau</td>
<td>33%</td>
<td>21%</td>
<td>19%</td>
<td>29%</td>
<td>5%</td>
<td>20%</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Andrew Scheer/Harper</td>
<td></td>
<td>29%</td>
<td>20%</td>
<td>3%</td>
<td>3%</td>
<td>17%</td>
<td>3%</td>
<td>3%</td>
<td>17%</td>
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<td>17%</td>
<td>3%</td>
<td>3%</td>
<td>17%</td>
<td>3%</td>
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<tr>
<td>Mario Beaulieu/Gilles Duceppe</td>
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<tr>
<td>Elizabeth May</td>
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<tr>
<td>Maxime Bernier</td>
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<tr>
<td>Undecided</td>
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<td>None</td>
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<td></td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
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<td>100%</td>
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<td>100%</td>
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<td>100%</td>
</tr>
</tbody>
</table>

- Justin Trudeau
- Andrew Scheer/Harper
- Mario Beaulieu/Gilles Duceppe
- Elizabeth May
- Maxime Bernier
- Undecided
- None
Carbon Pricing
In October, the federal government announced the details of the national minimum price for carbon. The federal government has determined that Saskatchewan, Manitoba, Ontario and New Brunswick have failed to meet the national minimum price. In those provinces, the federal government will bring in a tax on carbon-based fuels. The federal government will use 90 percent of those revenues to provide a rebate to consumer in those provinces. The remaining 10% will be used to provide support for schools, hospitals, small and medium-sized businesses, colleges and universities, municipalities, not-for-profit organizations and Indigenous communities.

How closely have you been following the news about this announcement?

[asked of all January respondents; n=1,200]
Most Canadians support the concept of the federal carbon price policy

Now you know the details of the federal government’s carbon price policy, do you support or oppose that policy?

[asked of all respondents; n=1,200]

- Strongly support
- Somewhat support
- Neither support nor oppose
- Somewhat oppose
- Strongly oppose
- Don't know

Net Support

Dec '18: 17% Strongly support, 30% Somewhat support, 16% Neither support nor oppose, 9% Somewhat oppose, 21% Strongly oppose, 7% Don't know. Net Support: +16%

Nov '18: 18% Strongly support, 26% Somewhat support, 17% Neither support nor oppose, 11% Somewhat oppose, 19% Strongly oppose, 8% Don't know. Net Support: +15%

Oct '18: 18% Strongly support, 20% Somewhat support, 20% Neither support nor oppose, 9% Somewhat oppose, 19% Strongly oppose, 14% Don't know. Net Support: +11%
Canadians are more divided on the core arguments

Based on what you know about the federal government’s carbon pricing policy, which of the following statements is closest to your point of view?
[asked of all December CTM respondents; n=1,200]

- Smith says:
  Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country.

- Jones says:
  The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing for the environment.

- 46% Agree with Smith
- 42% Agree with Jones
- 12% Don’t know
Expected Impact: Provinces without existing carbon pricing are slightly more likely to expect a significant increase in their cost of living.

Do you feel your cost of living will increase or decrease as a result of the new federal carbon tax? [asked of all January CTM respondents, n=1,200]

- **Existing Carbon Pricing**
  - Increase significantly: 18%
  - Increase somewhat: 39%
  - Remain the same: 25%
  - Decrease somewhat: 3%
  - Decrease significantly: 14%
  - Don’t know: 14%
  - **Net Increase:** +53%

- **New Carbon Pricing**
  - Increase significantly: 24%
  - Increase somewhat: 36%
  - Remain the same: 23%
  - Decrease somewhat: 5%
  - Decrease significantly: 2%
  - Don’t know: 11%
  - **Net Increase:** +53%

**Note:** Net Increase is [Increase significantly] + [Increase somewhat] – [Decrease somewhat] – [Decrease significantly]
In Alberta, Kenny and the UCP are firmly in the driver’s seat. Notley has at best an outside chance by focusing on leadership.

In Ontario, the Liberals are back thanks to brand while politics is being defined by the fiscal debate.

Federally, the Liberals are well positioned as the election nears. They are ahead in key battlegrounds and on brand.

Right now, the regions of Quebec are the most interesting with three parties in the race and nativism playing a key role.

In English Canada, a big question is whether the implementation of the carbon tax will change how people feel about the policy.
Appendices
Appendix 1: Creating a Three-Month Average

Federal horserace numbers and Albertan provincial horserace numbers shown are the pooled results of the last three *Canada This Month* surveys, fielded between November 2018 and January 2019. Results are pooled for greater certainty overall and within each subregion. The table below shows the field dates of the three surveys, as well as their weighted and unweighted sample sizes.

Decided vote results shown are the combined results of the January 2019, December 2018, and November 2018 *Canada This Month* surveys. The December survey was conducted between December 21st and January 7th, and the November survey was conducted between November 8th and 15th.

<table>
<thead>
<tr>
<th>Survey</th>
<th>Field Dates</th>
<th>Method</th>
<th>National Unweighted N-Size</th>
<th>National Weighted N-Size</th>
<th>Alberta Unweighted N-Size</th>
<th>Alberta Weighted N-Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2018 CTM</td>
<td>November 8th to 15th, 2018</td>
<td>Online</td>
<td>2,490</td>
<td>1,200</td>
<td>378</td>
<td>300</td>
</tr>
<tr>
<td>December 2018 CTM</td>
<td>December 21st to January 7th, 2019</td>
<td>Online</td>
<td>2,700</td>
<td>1,200</td>
<td>592</td>
<td>500</td>
</tr>
<tr>
<td>January 2019 CTM</td>
<td>January 16th to 24th, 2019</td>
<td>Online</td>
<td>2,451</td>
<td>1,200</td>
<td>348</td>
<td>300</td>
</tr>
</tbody>
</table>
These are the results of the January 2019 Canada This Month survey conducted between January 16th and 24th, 2019.

This online survey of 2,451 adult Canadians was conducted using INNOVATIVE’s Canada 20/20 national research panel with additional respondents from Leger Marketing and Lucid, both leading providers 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, the Leger Panel and the Lucid 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.

Confidence: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Weighting: Results for Canada are weighted by age, gender, and region to ensure that the overall sample’s composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability. Weighted and unweighted frequencies are reported in the table.
Leadership and party brand results are the findings of the September Canada This Month survey 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.

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Weighting: September results for Canada are weighted by age, gender, and region to ensure that the overall sample’s composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Unweighted (n)</th>
<th>Unweighted (%)</th>
<th>Weighted (n)</th>
<th>Weighted (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Males 18-34</td>
<td>255</td>
<td>10.6%</td>
<td>165</td>
<td>13.8%</td>
</tr>
<tr>
<td>Males 35-54</td>
<td>369</td>
<td>15.3%</td>
<td>201</td>
<td>16.7%</td>
</tr>
<tr>
<td>Males 55+</td>
<td>510</td>
<td>21.2%</td>
<td>217</td>
<td>18.1%</td>
</tr>
<tr>
<td>Females 18-34</td>
<td>320</td>
<td>13.3%</td>
<td>163</td>
<td>13.6%</td>
</tr>
<tr>
<td>Females 35-54</td>
<td>415</td>
<td>17.2%</td>
<td>208</td>
<td>17.4%</td>
</tr>
<tr>
<td>Females 55+</td>
<td>541</td>
<td>22.4%</td>
<td>245</td>
<td>20.4%</td>
</tr>
<tr>
<td>BC (BC and Yukon)</td>
<td>491</td>
<td>20.4%</td>
<td>163</td>
<td>13.6%</td>
</tr>
<tr>
<td>Alberta (Alberta and the Northwest Territories)</td>
<td>411</td>
<td>17.1%</td>
<td>136</td>
<td>11.3%</td>
</tr>
<tr>
<td>Prairies (Saskatchewan, Manitoba, and Nunavut)</td>
<td>104</td>
<td>4.3%</td>
<td>80</td>
<td>6.7%</td>
</tr>
<tr>
<td>Ontario</td>
<td>614</td>
<td>25.5%</td>
<td>459</td>
<td>38.2%</td>
</tr>
<tr>
<td>Quebec</td>
<td>388</td>
<td>16.1%</td>
<td>280</td>
<td>23.4%</td>
</tr>
<tr>
<td>Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland)</td>
<td>402</td>
<td>16.7%</td>
<td>82</td>
<td>6.8%</td>
</tr>
</tbody>
</table>
Appendix 4: December 2018 CTM Methodology

Alberta politics results are the findings of the December Canada This Month survey conducted from December 21st to January 6th, 2019.

This online survey of 2,700 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. Alberta results are weighted to n=500.

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.

Confidence: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Weighting: December results for Canada are weighted by age, gender, and region to ensure that the overall sample’s composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.
Results for satisfaction with the 2018 election are from a telephone survey of 607 randomly-selected Ontario residents, 18 years or older, between June 13th and 21st, 2018. Only one respondent per household was eligible to complete this survey. The survey includes both landline and cellphone respondents in order to ensure representation of cellphone only households. The sample has been weighted by age, gender and region to n=600 using the latest available Statistics Canada Census data to reflect the actual demographic composition of the population. After weighting the data, the aggregated results are considered accurate to within ±4.0%, 19 times out of 20. Tracking from 2003 is drawn from an October post-election survey of 606 respondents.

<table>
<thead>
<tr>
<th>Males 18-34</th>
<th>Unweighted (n)</th>
<th>Unweighted (%)</th>
<th>Weighted (n)</th>
<th>Weighted (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>63</td>
<td>10.4%</td>
<td>83</td>
<td>13.8%</td>
</tr>
<tr>
<td>Males 35-54</td>
<td>90</td>
<td>14.8%</td>
<td>100</td>
<td>16.6%</td>
</tr>
<tr>
<td>Males 55+</td>
<td>140</td>
<td>23.1%</td>
<td>106</td>
<td>17.7%</td>
</tr>
<tr>
<td>Females 18-34</td>
<td>59</td>
<td>9.7%</td>
<td>83</td>
<td>13.8%</td>
</tr>
<tr>
<td>Females 35-54</td>
<td>98</td>
<td>16.1%</td>
<td>107</td>
<td>17.8%</td>
</tr>
<tr>
<td>Females 55+</td>
<td>157</td>
<td>25.9%</td>
<td>122</td>
<td>20.3%</td>
</tr>
<tr>
<td>Toronto</td>
<td>158</td>
<td>26.0%</td>
<td>162</td>
<td>27.0%</td>
</tr>
<tr>
<td>Rest of GTA</td>
<td>94</td>
<td>15.5%</td>
<td>124</td>
<td>20.7%</td>
</tr>
<tr>
<td>South/West</td>
<td>175</td>
<td>28.8%</td>
<td>157</td>
<td>26.1%</td>
</tr>
<tr>
<td>North/East</td>
<td>180</td>
<td>29.7%</td>
<td>157</td>
<td>26.1%</td>
</tr>
</tbody>
</table>
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glyle@innovativeresearch.ca

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www.innovativeresearch.ca

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