

No Margin for Error

Public Opinion Research

February 11th, 2019

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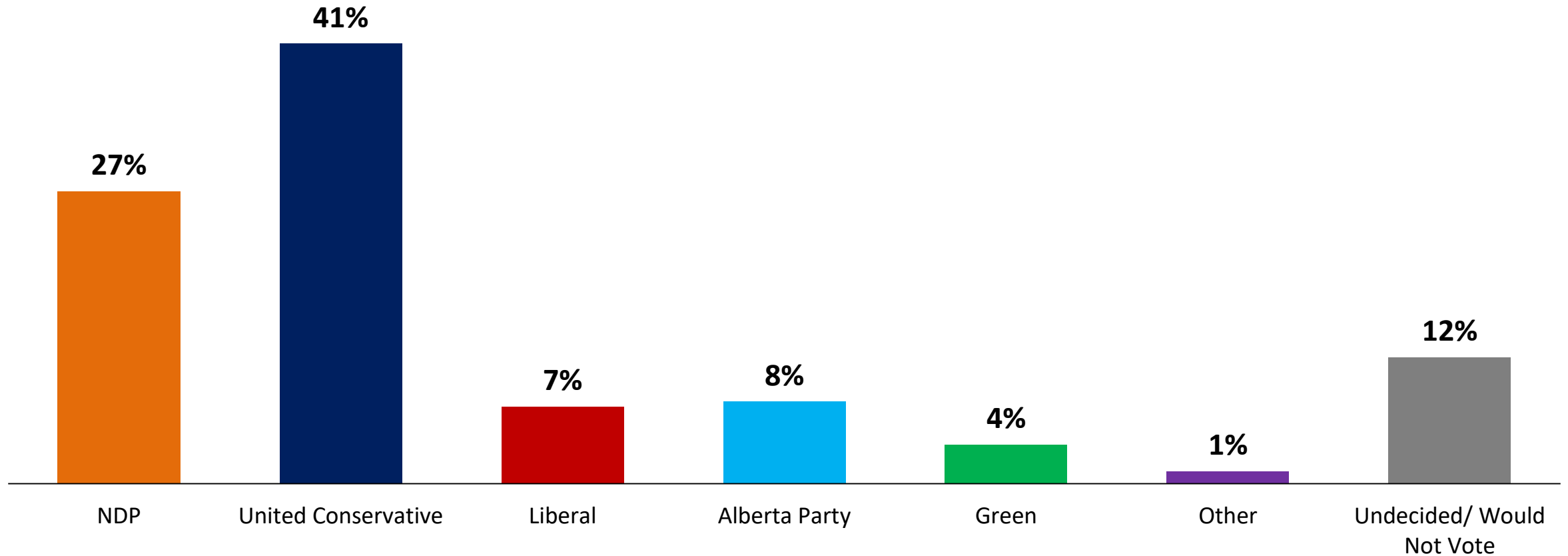
Alberta Politics

Provincial Landscape: The UPC (41%) has a significant lead over the NDP⁴ (27%) while the Liberals, Alberta Party, and Greens are all below 10%

Q

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]

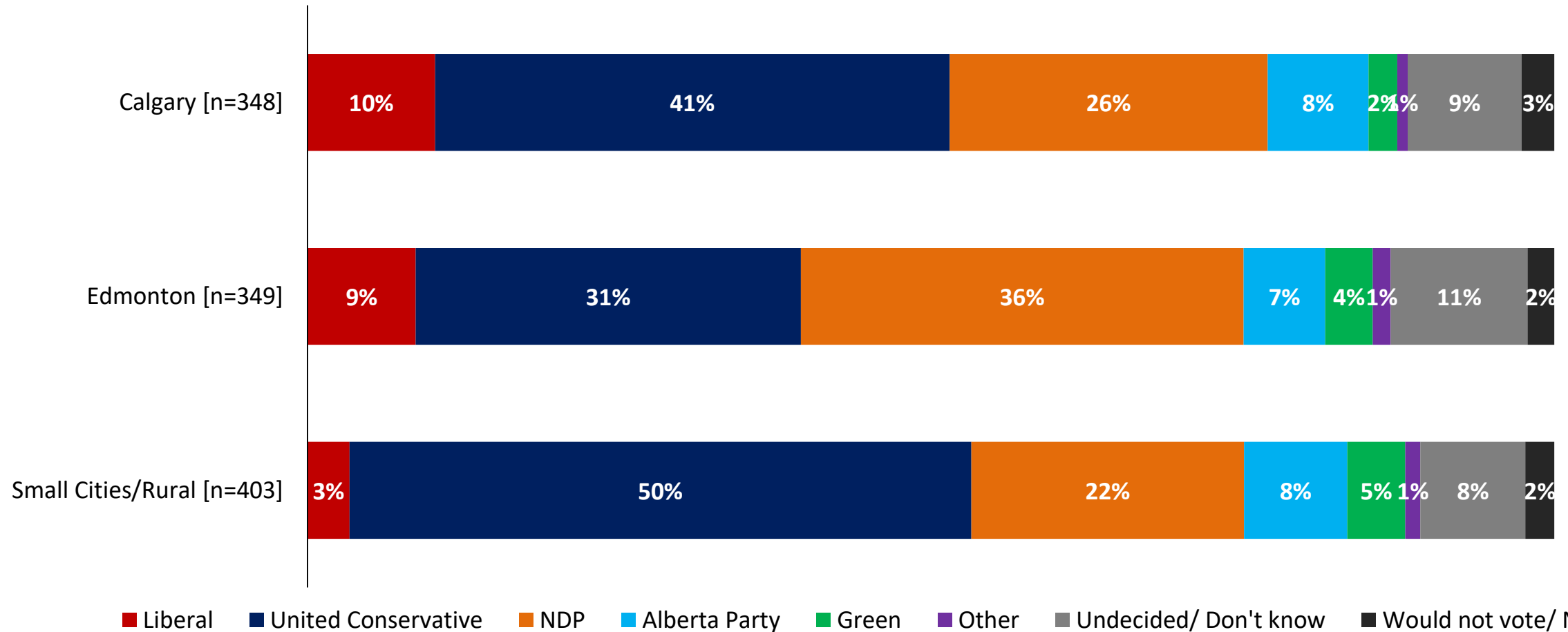


Alberta Combined Vote – 3 Month Average: The UCP lead by a wide margin in Calgary and Small Cities/Rural but the NDP lead in Edmonton



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]

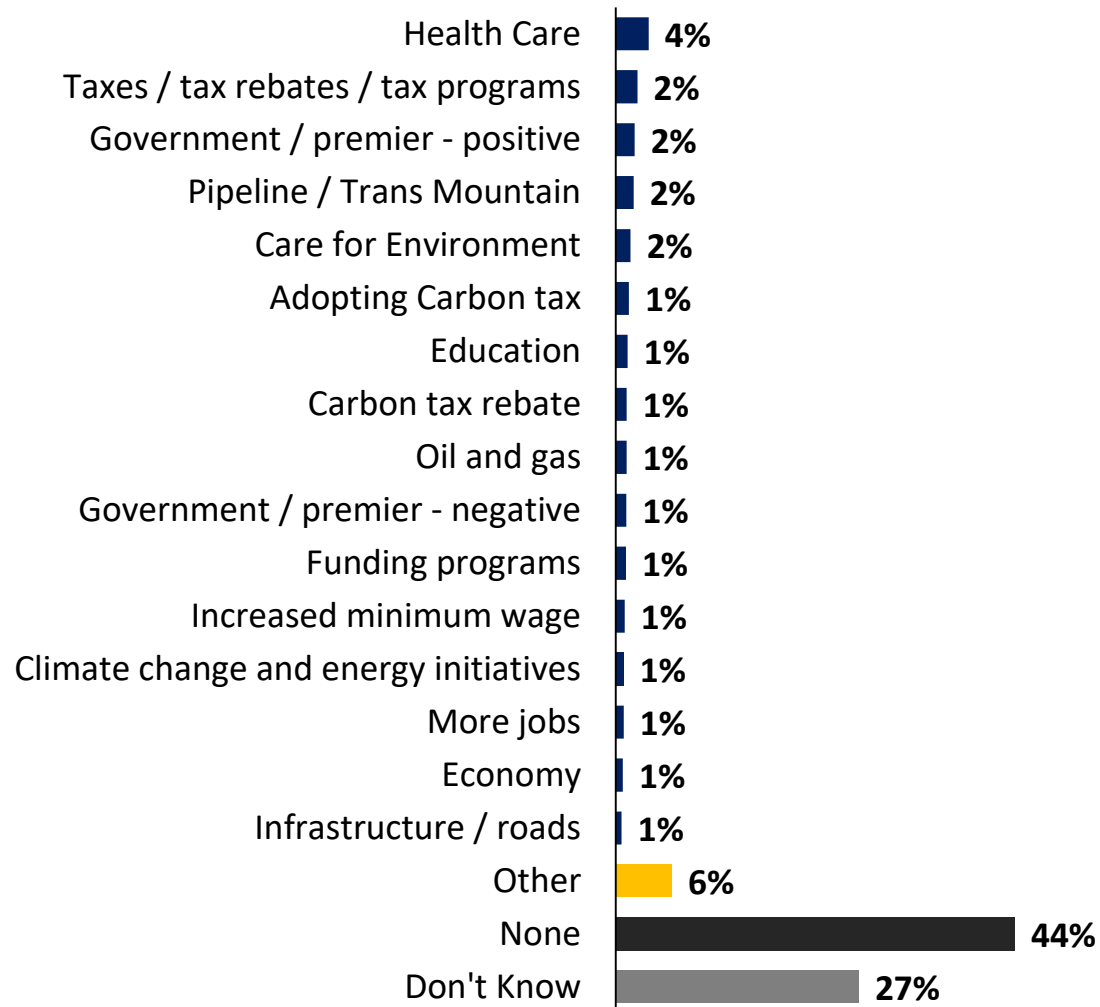
[Showing the results of the last 3 CTM surveys]



Notley's Impact: Albertans were most likely to cite the carbon tax as something Notley has done that negatively impacted them

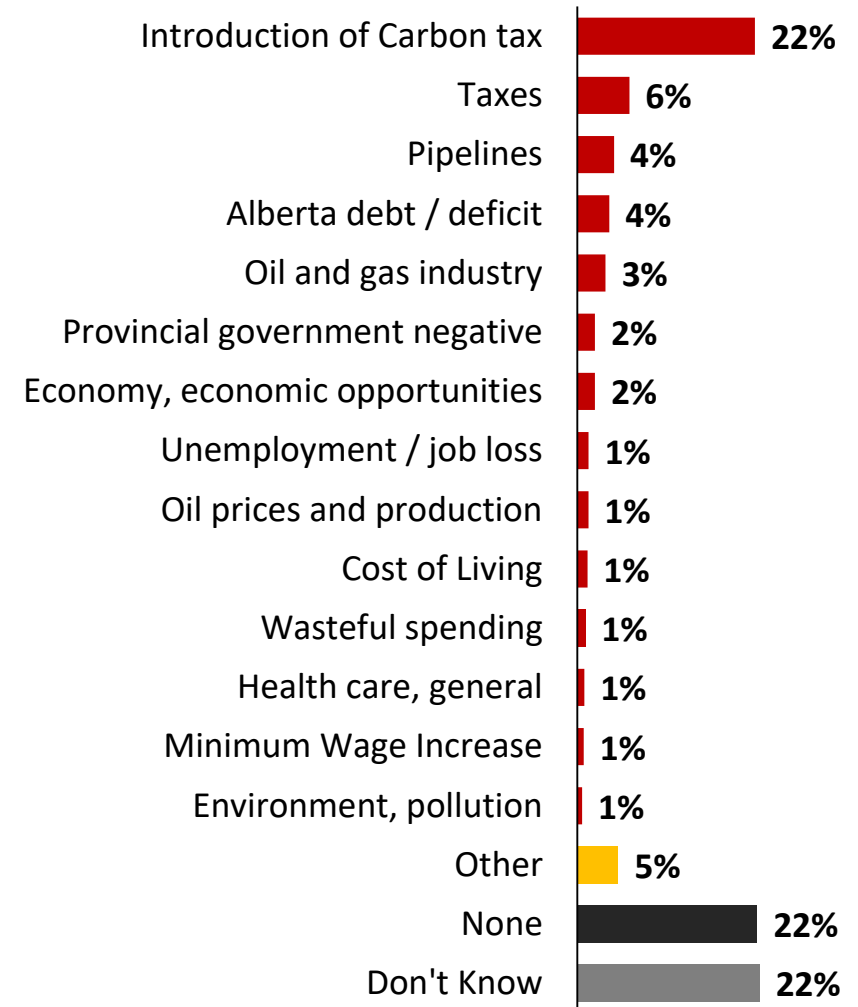
Q

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]



Q

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



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]

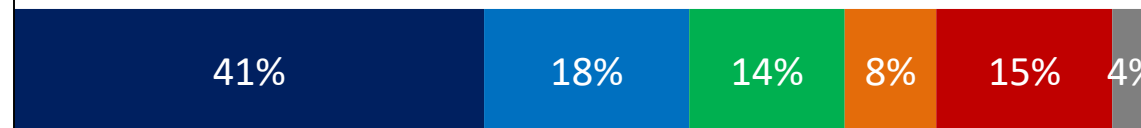
Net
Agreement

Alberta politics is really a two-horse race, only the United Conservative Party and the NDP have a real chance of forming government.



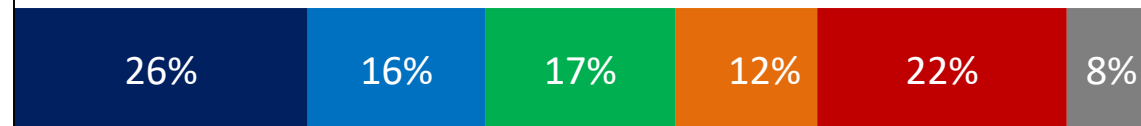
+43%

It's time for a change in government here in Alberta.



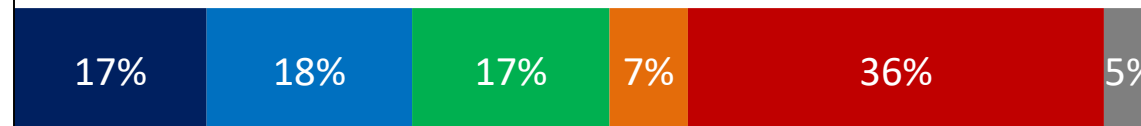
+36%

The United Conservative Party is too extreme for me.



+7%

The NDP may have its problems, but it is still the party best able to run the government here in Alberta.



-8%

Strongly agree

Somewhat agree

Neither agree nor disagree

Somewhat disagree

Strongly disagree

Don't know

Leadership Favourable Tracking: Between January and December, 2018,⁸ Kenney has declined in popularity while Notley has improved

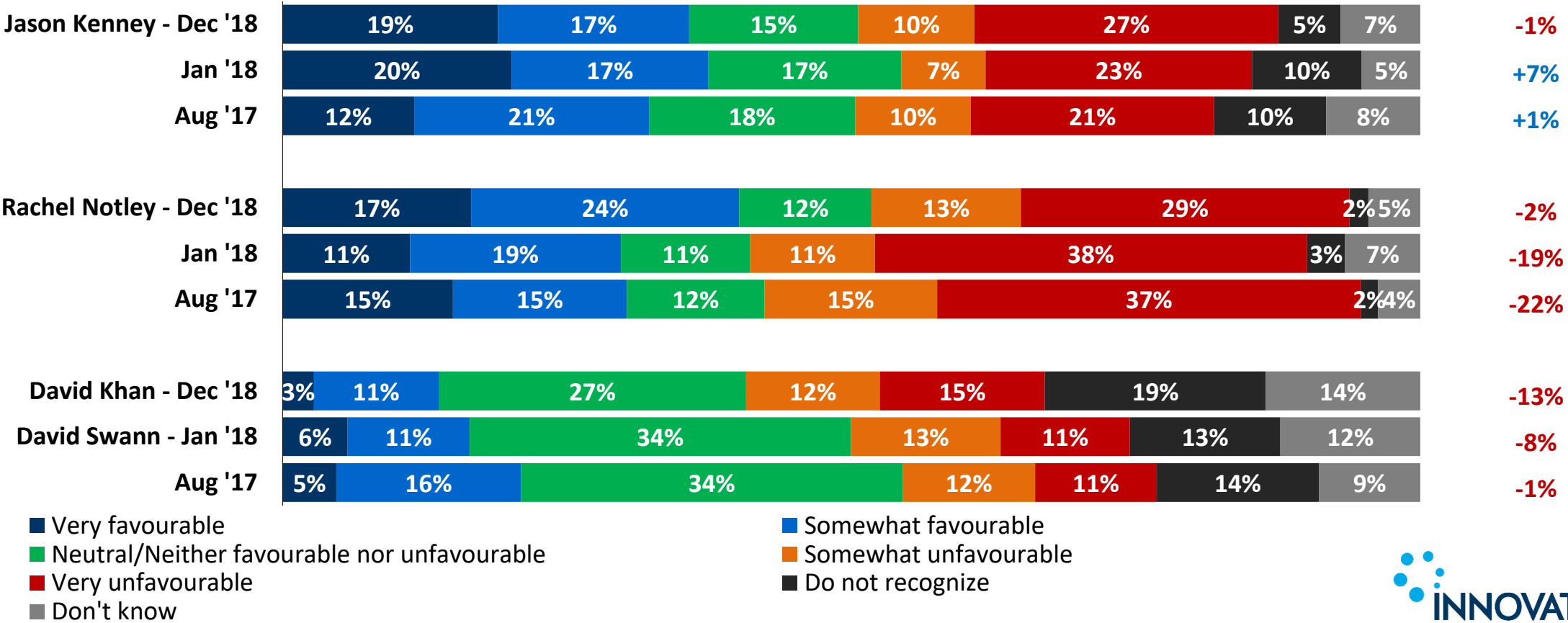


Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable 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]

Net Favourability

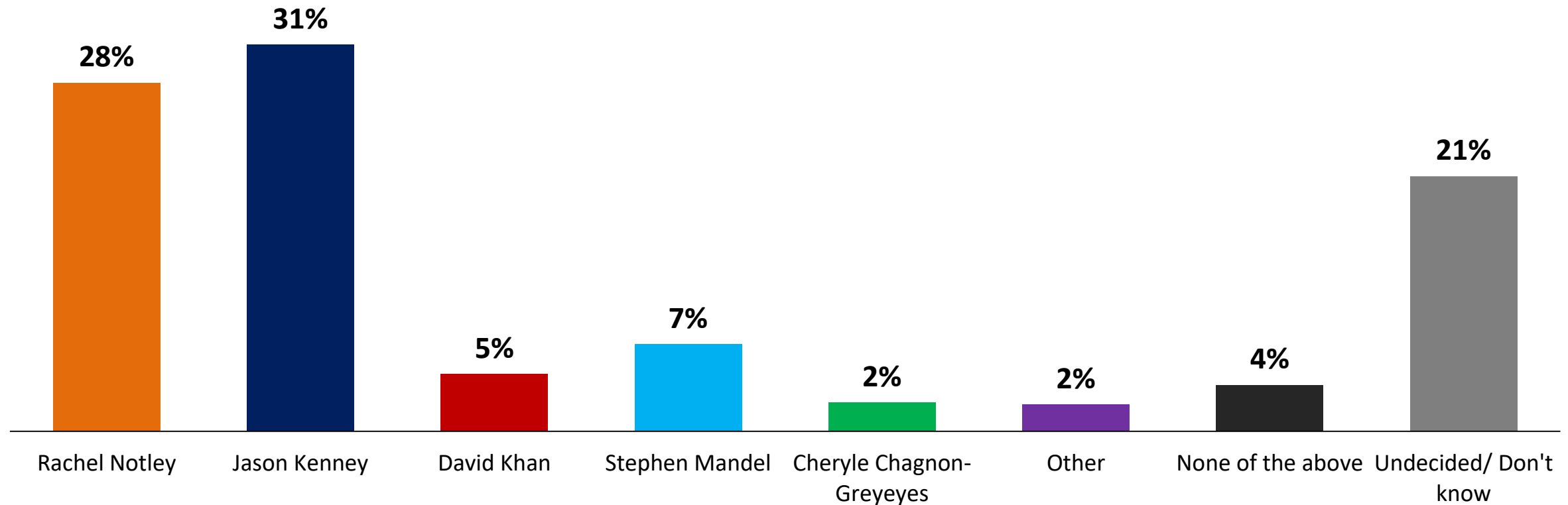


Best Premier: Notley (28%) trails Kenney (31%) closely as respondents choice for best Premier; 21% are undecided



Which of the following leaders would make the best Premier of Alberta?

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



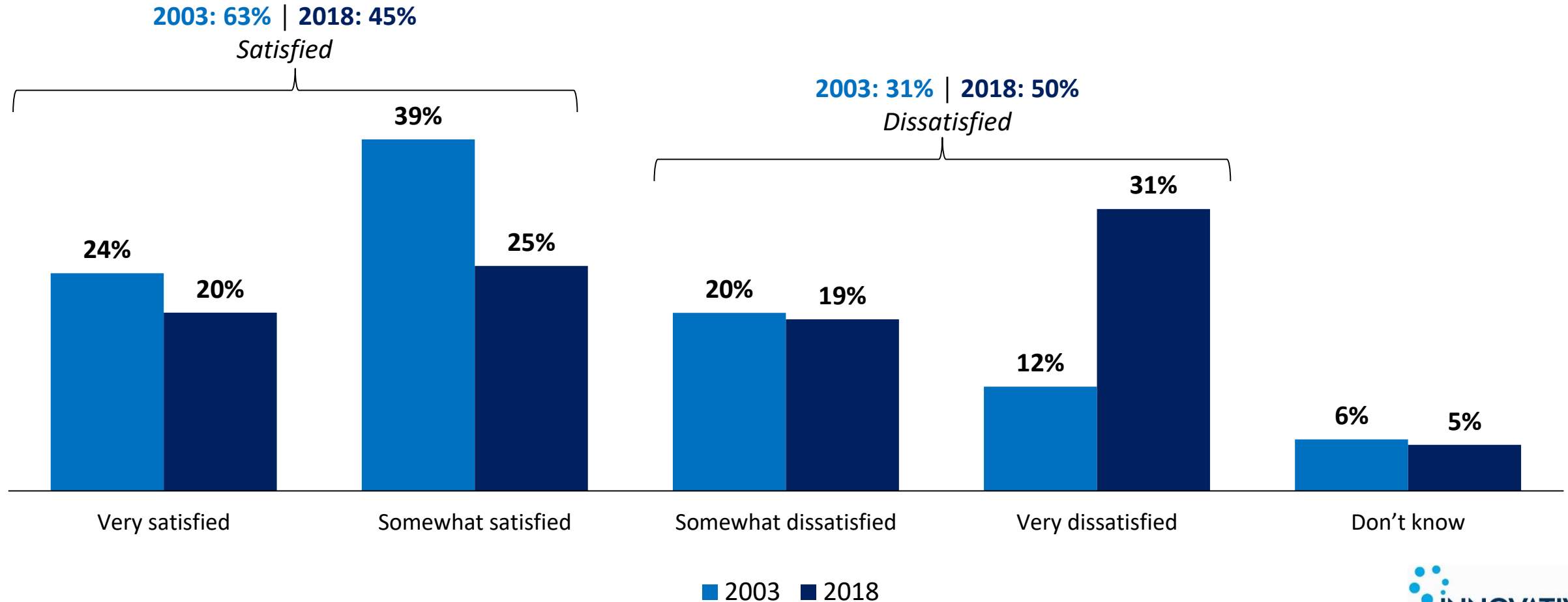
Ontario Politics

Satisfaction with Outcome: Respondents much less satisfied with the election outcome than in 2003 when McGuinty was first election

Q

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?

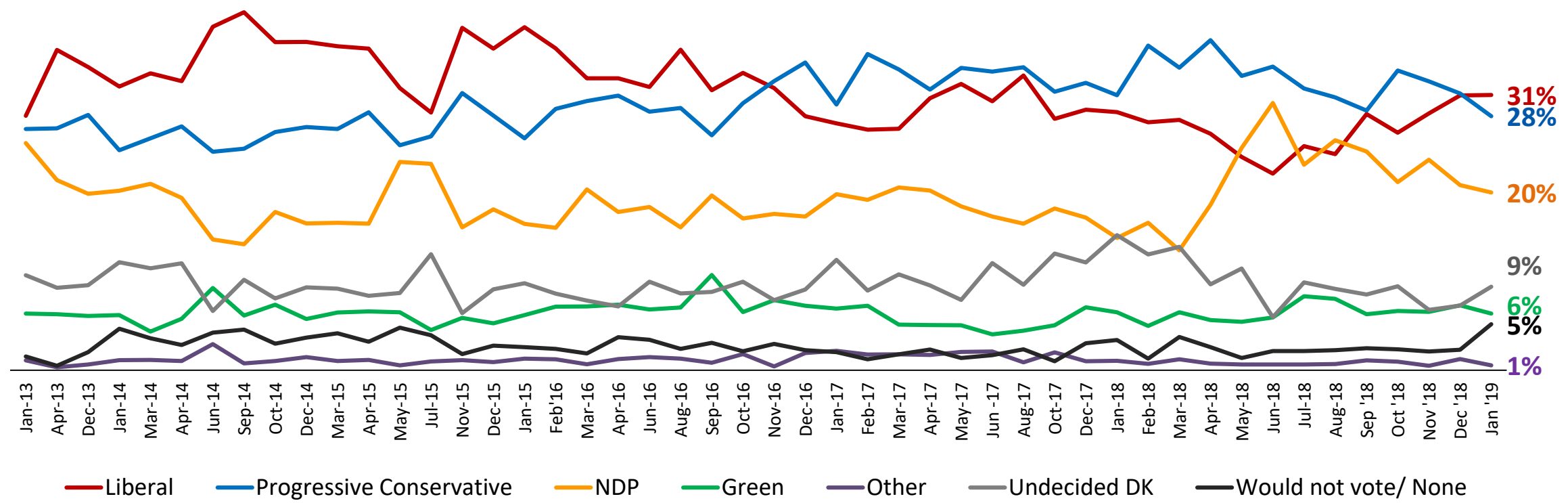
[asked of all respondents; results from the June 2018 OTM telephone survey; n=600]



Provincial Landscape: The Liberals (31%) now lead the PCs (28%) for the first time since October 2016¹²



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]

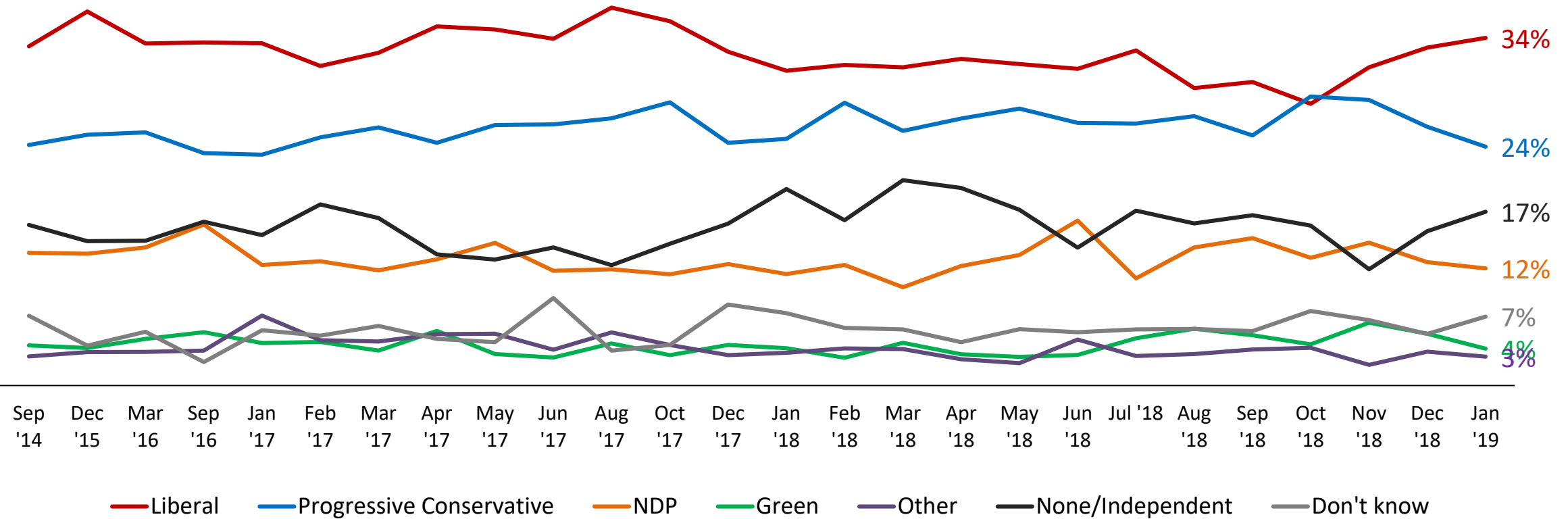


Party ID: Liberals now have a 10 point lead on partisanship; PCs continue to drop as the number of Unaligned respondents grows

Q

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 of¹⁴ brand loyalty, still room for Liberal growth

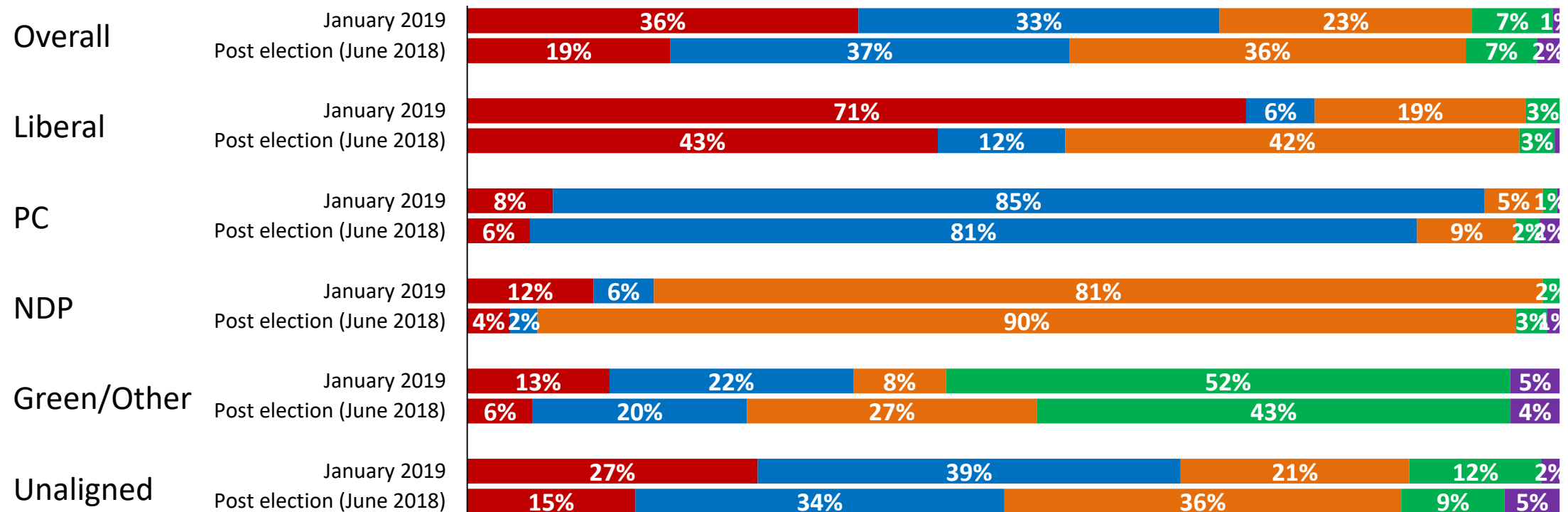
Q

[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]



■ The Liberal Candidate
■ The New Democratic Party Candidate
■ Other

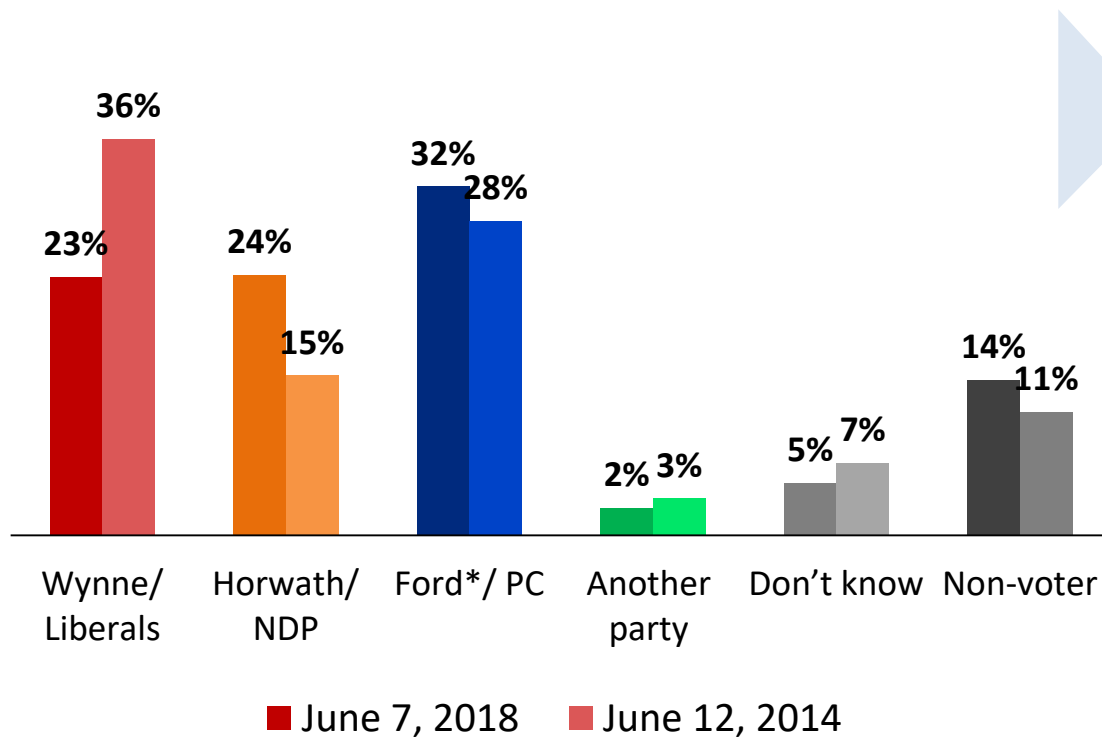
■ The Progressive Conservative Candidate
■ The Green Party Candidate

Past Vote and Impact: Ford's impact so far viewed negatively, but less negatively than Wynne's in 2017

Q

Thinking back to the [ELECTION DATE] provincial election, which political party and leader did you vote for?

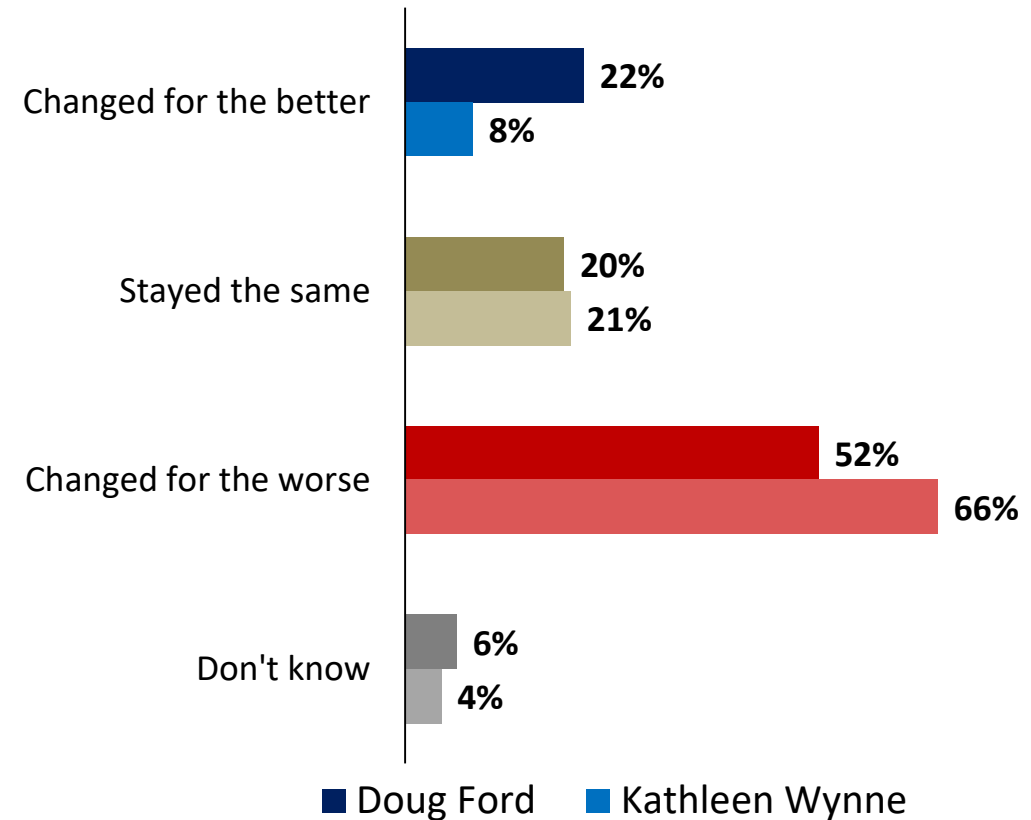
[asked of all respondents in Ontario; n=600; showing results from December 2018 compared to results from CTM March 2017]



Q

Since that election, has [PREMIER] changed Ontario for the better, changed for the worse, or stayed pretty much the same?

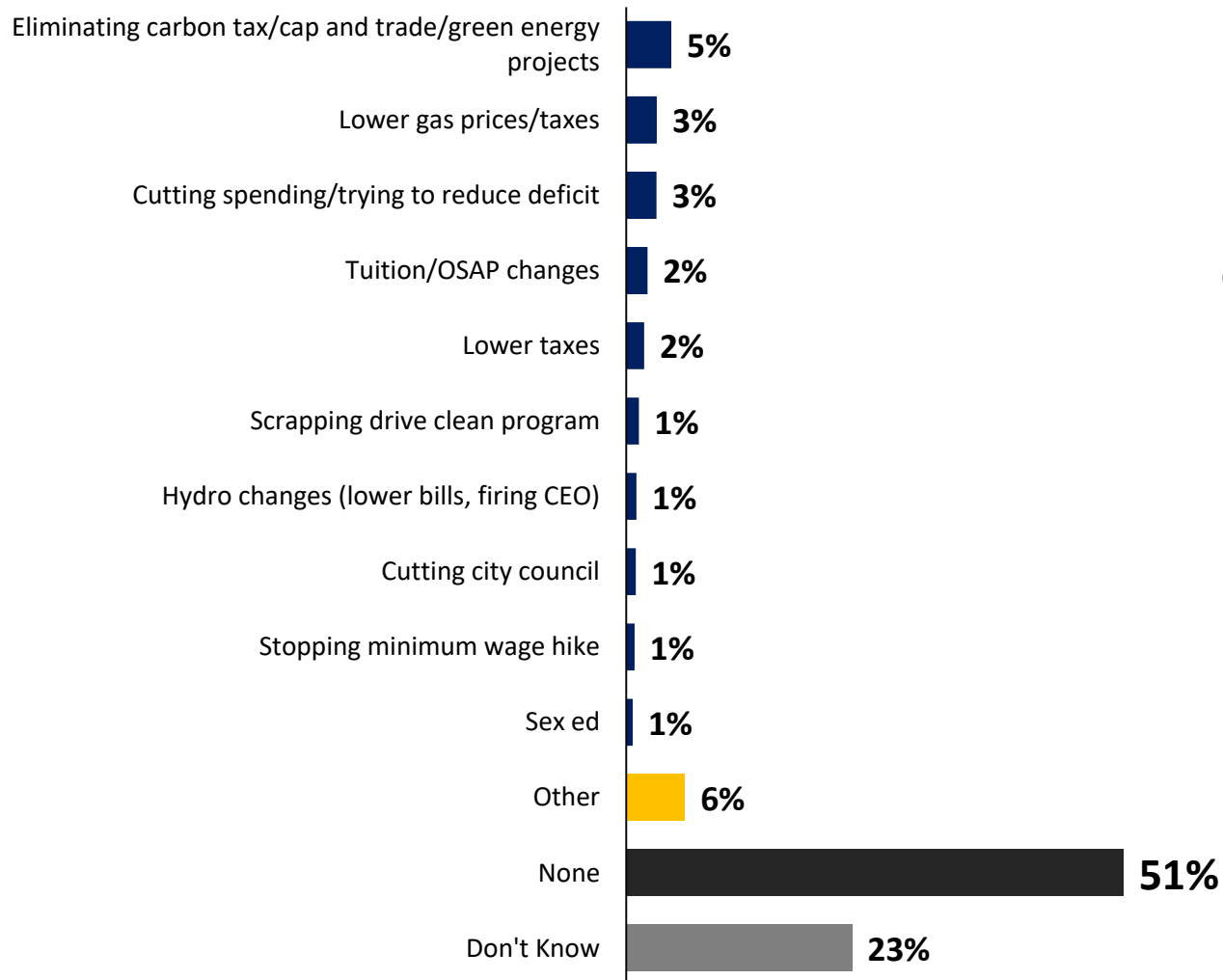
[asked of all respondents in Ontario; n=600; showing results from December 2018 compared to results from CTM March 2017]



Ford's Impact: Fiscal issues driving government image. Positives come from tax and spending cuts, negatives comes from mostly from benefit

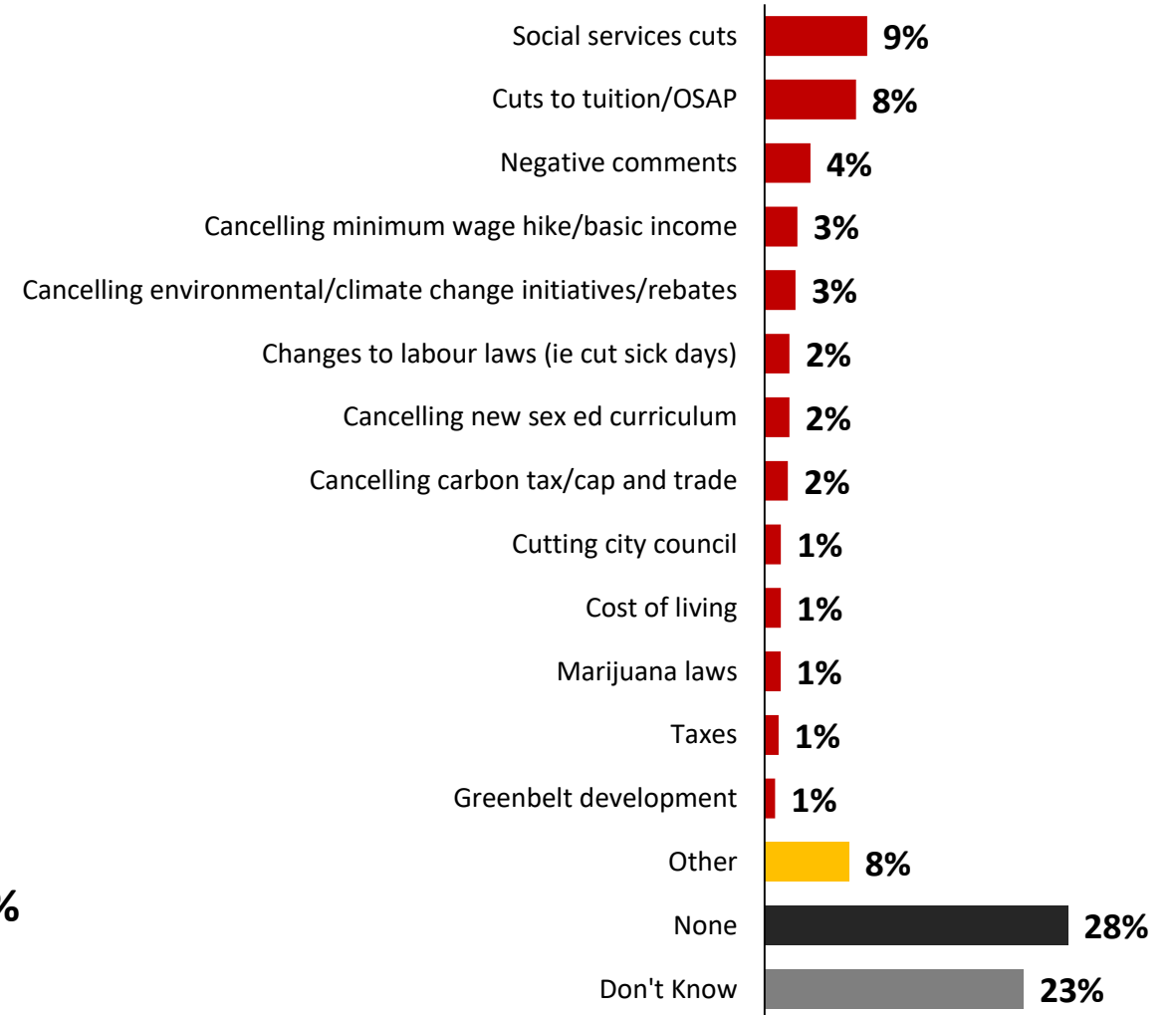
Q

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]



Q

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]



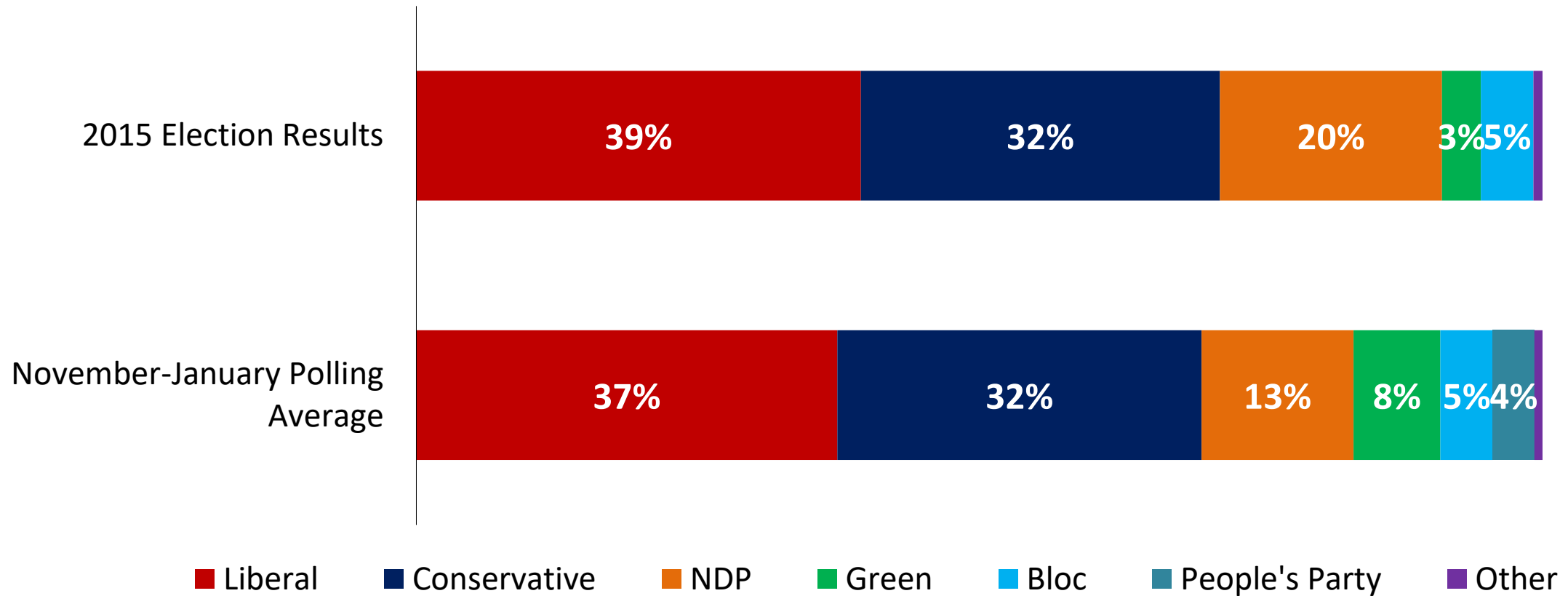
Federal Horserace

2015 versus Now: Today's overall landscape looks quite similar to 2015, but with a softened NDP and stronger third parties



Decided Vote

[Showing the results of the last three CTM surveys; combined n=3,154]

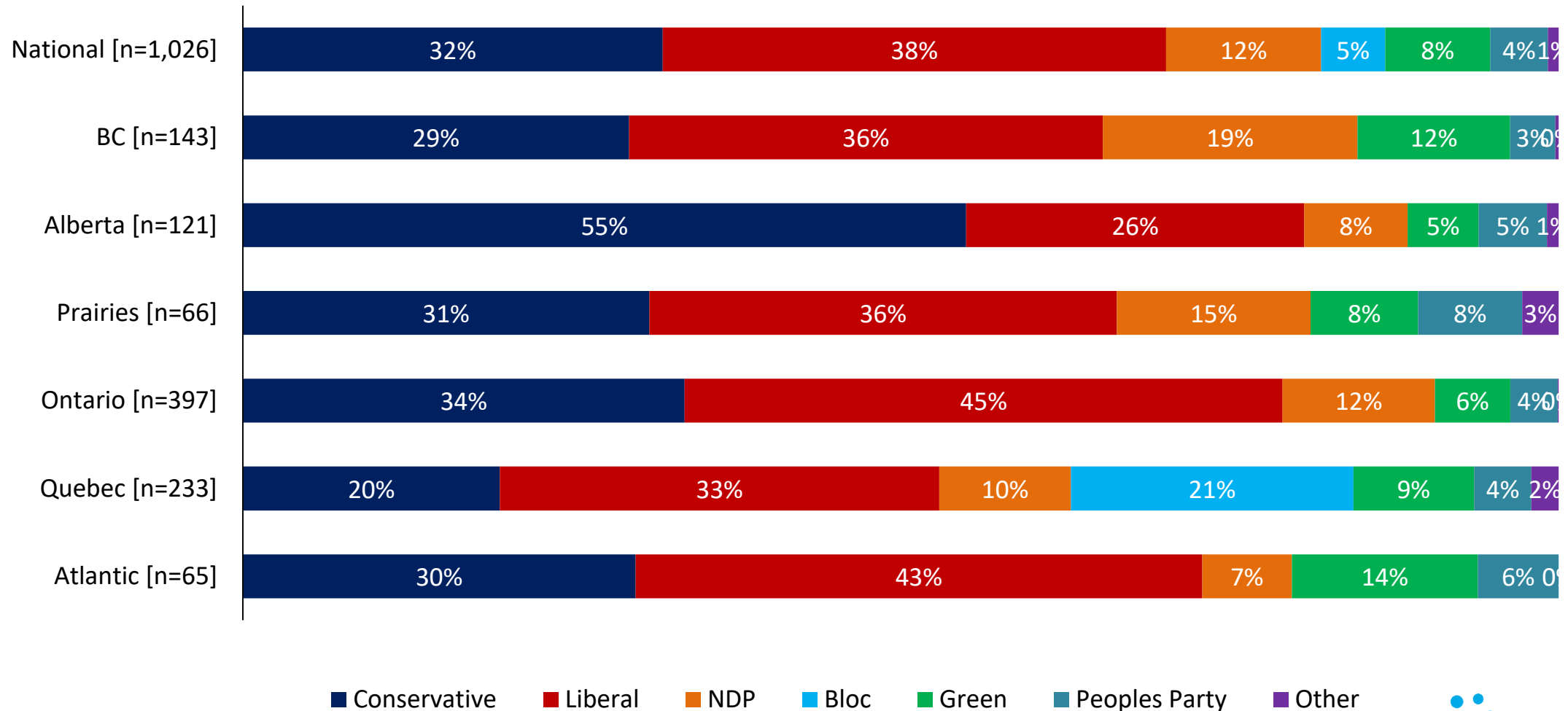


Federal Decided Vote – January 2019: In January, the Liberals lead at 38% nationally, followed by the Conservatives at 32%

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]

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

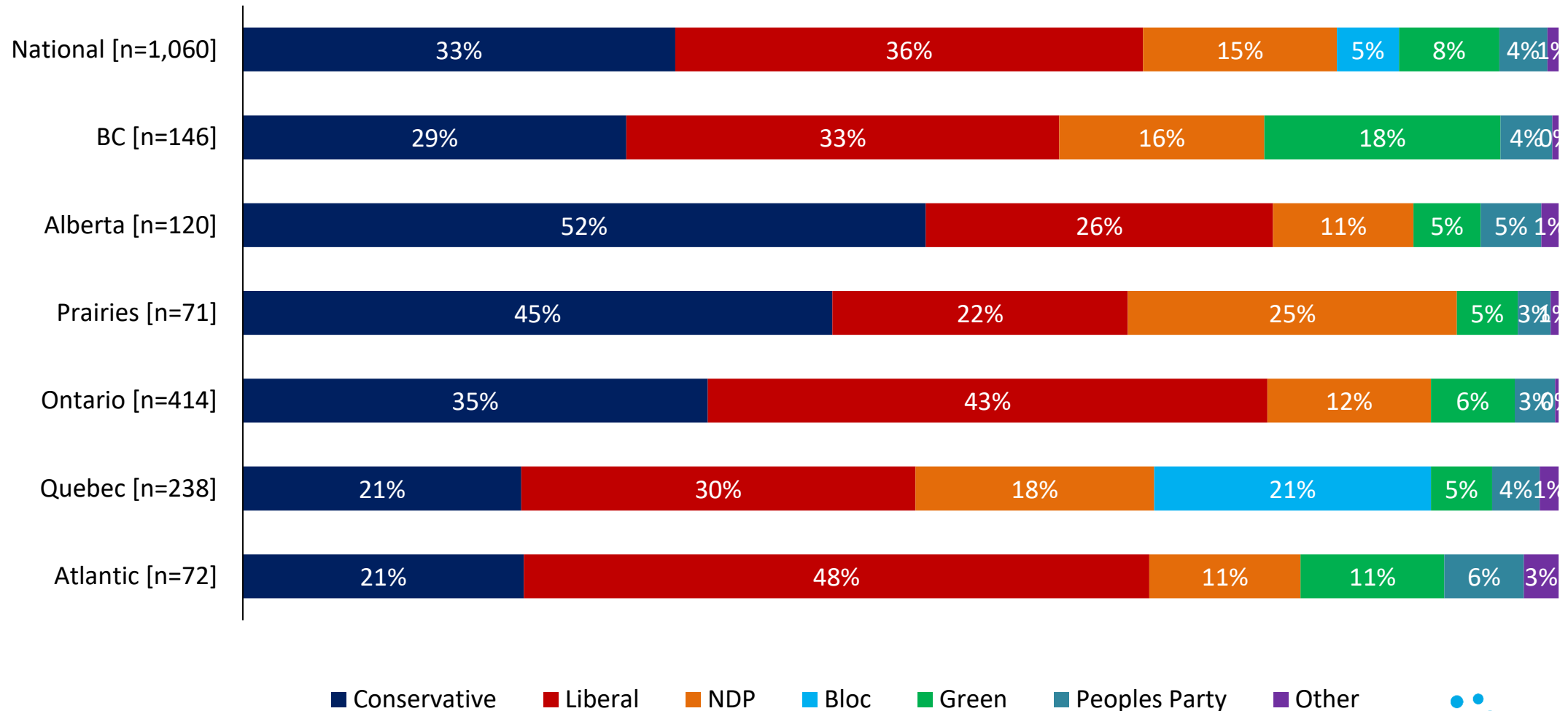


Federal Decided Vote – December 2018: Liberals ahead nationally and in every region except Alberta and the Prairies

Q

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

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

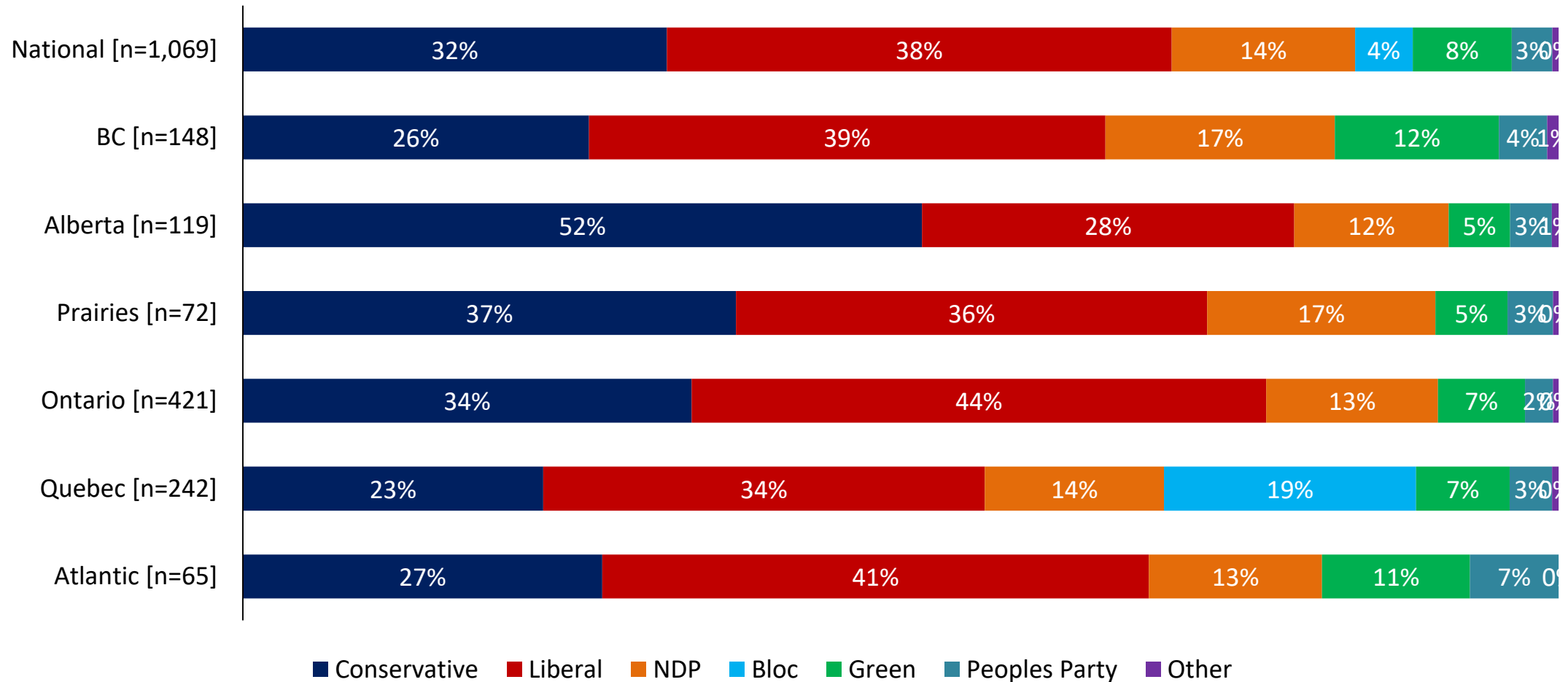


Federal Decided Vote – November 2018: Liberals lead by 6 points overall; in Ontario the Liberals are head by 10 points

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]

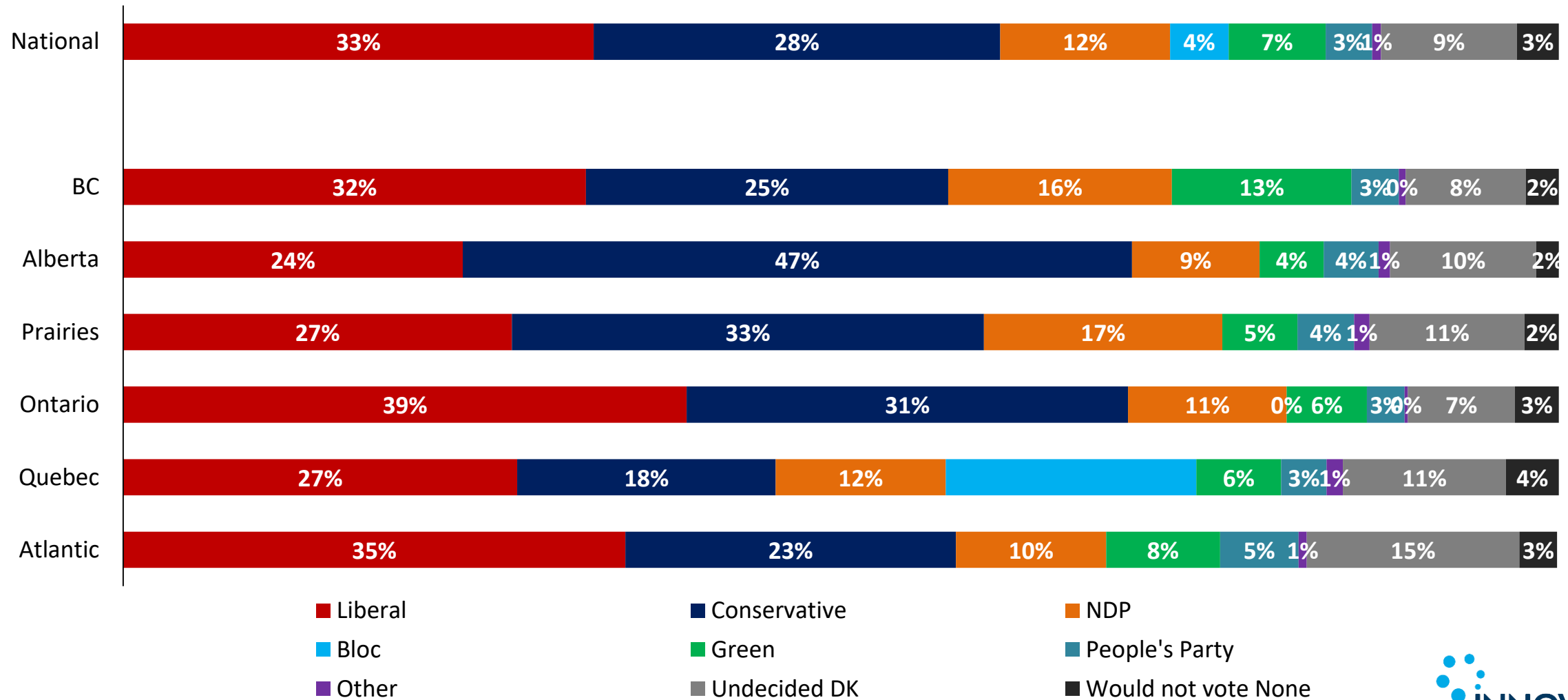
[Showing the results of the January CTM; n=1,069]



Combined Vote: Liberals lead the Conservatives by 5 points among all voters but 9% are still undecided

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]



Regional Analysis

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.

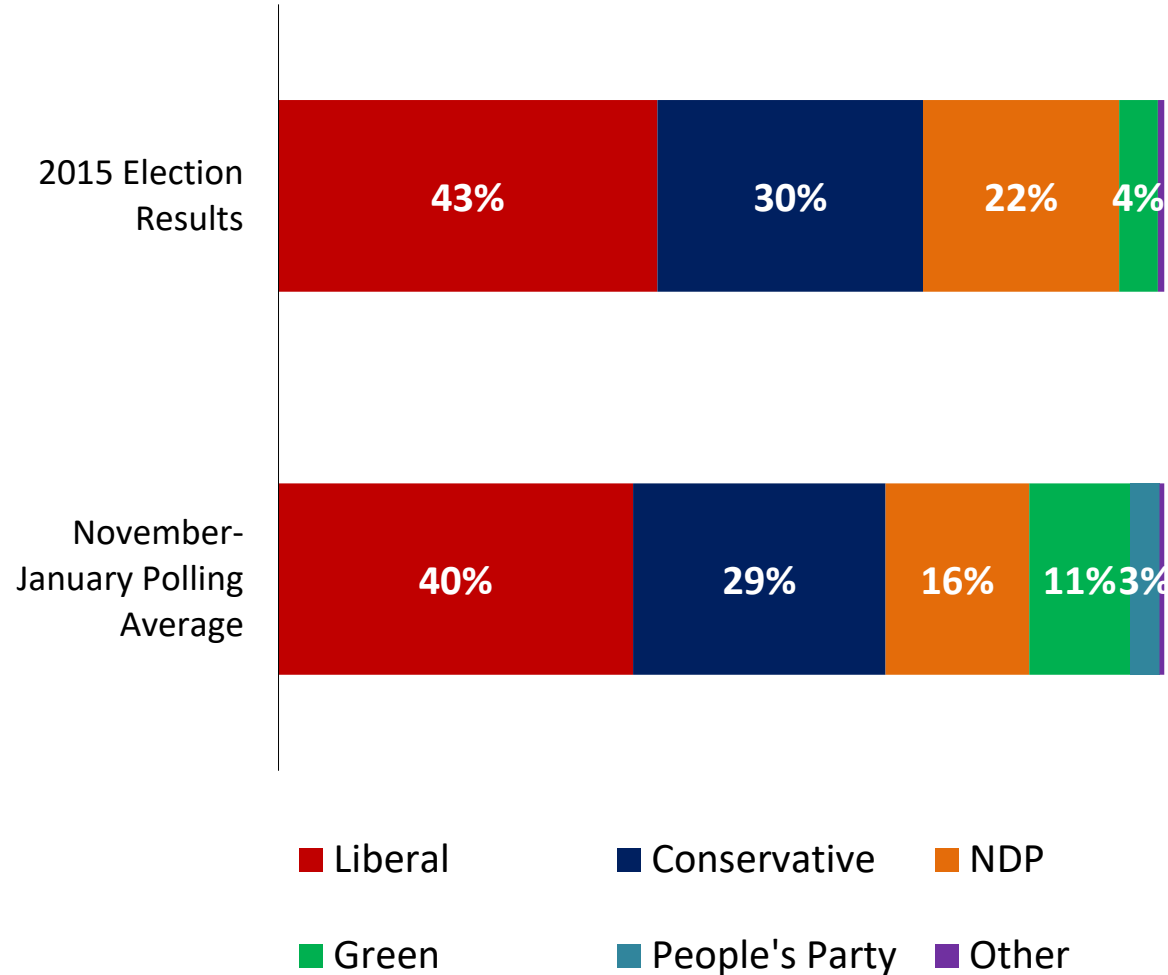
Region	Subregion	N-Size
Atlantic Canada	Urban Atlantic	93
	Rural Atlantic	102
Quebec	Quebec City Area	116
	Rural Francophone Quebec	230
	Francophone Montreal/Suburbs	169
	Quebec: Anglophone or Mixed	197
Ontario	Toronto	257
	GTA Suburbs	305
	South/West	326
	North/East	326
Prairies	Winnipeg/Saskatoon/Regina	137
	Rest of Prairies	66
Alberta	Calgary/Edmonton	197
	Rest of Alberta	152
BC	City of Vancouver	69
	Vancouver Suburbs	160
	Fraser Valley	36
	Vancouver Island	72
	Rest of BC	85
Territories	Territories	5

Vancouver Suburbs: Liberals virtually unchanged as the NDP fell from 22% to 16%

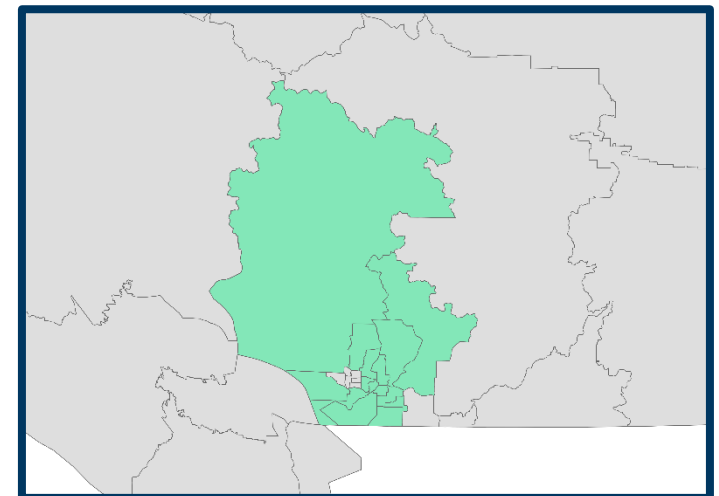


Decided Vote

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



Party	Current Seats	Close Seats (won by <10 points)
Liberal	11	4
CPC	2	2
NDP	3	2

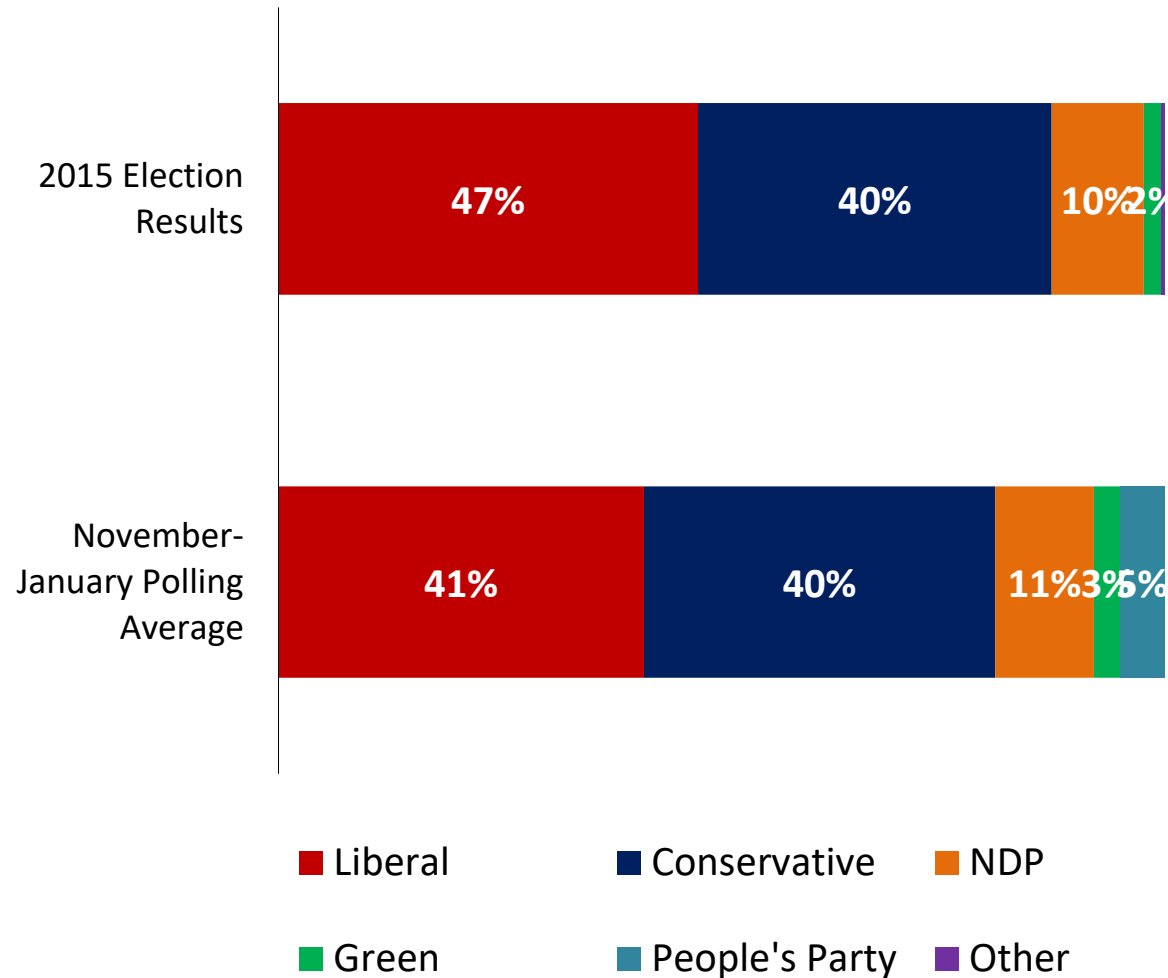


Suburban GTA: Slight Liberal lead from 2015 has evaporated; Liberals (41%) and Conservatives (40%) are now tied

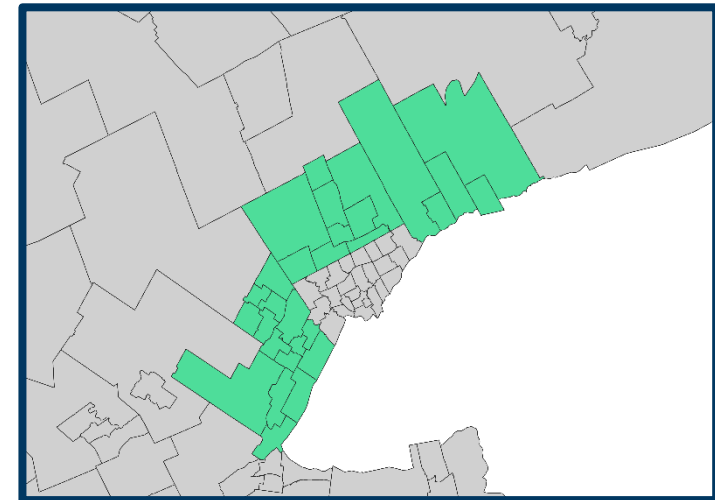


Decided Vote

[Showing the results of the last three CTM surveys; combined n=305]



Party	Current Seats	Close Seats (won by <10 points)
Liberal	24	12
CPC	5	4
NDP	0	0

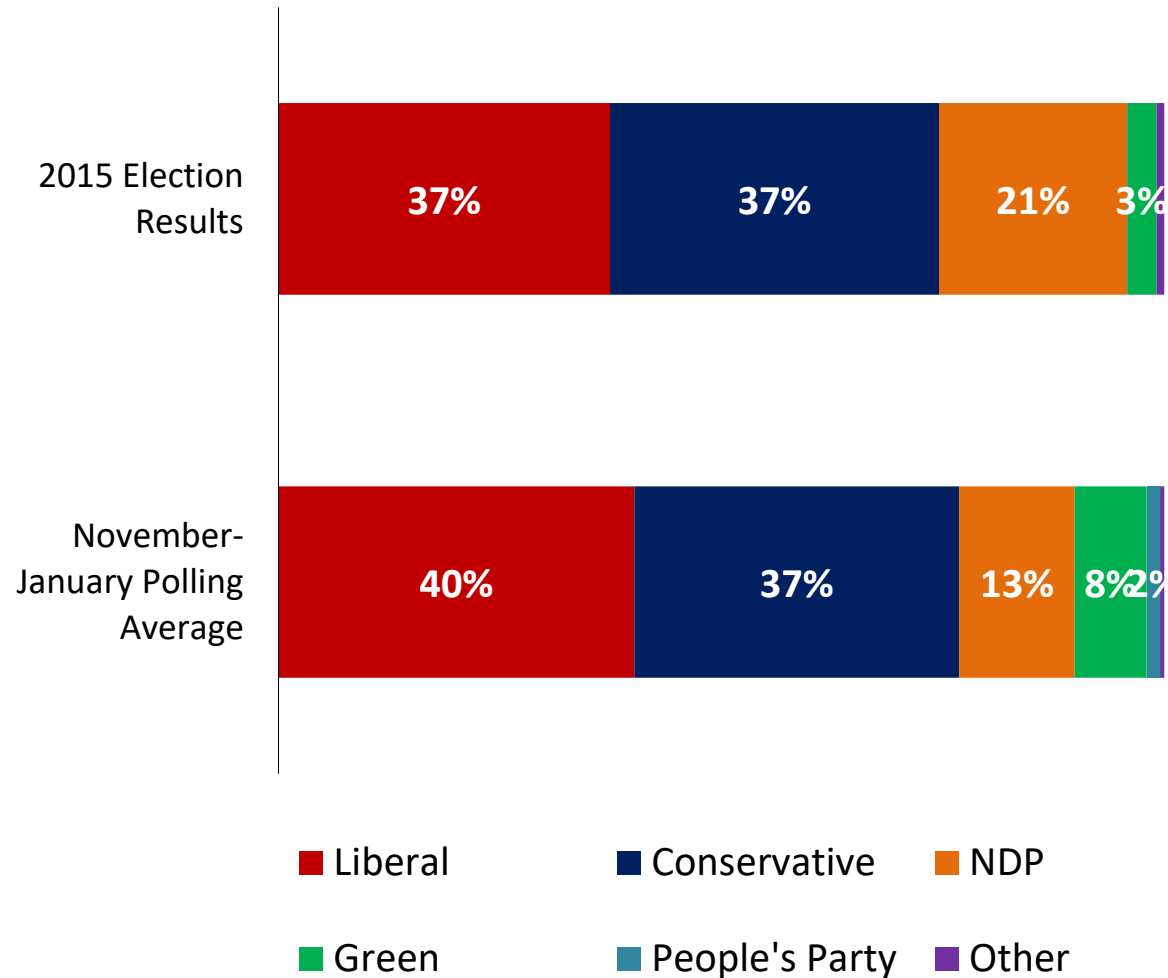


Ontario South/West: Liberals have gained slightly while the NDP have fallen from 21% to 13%

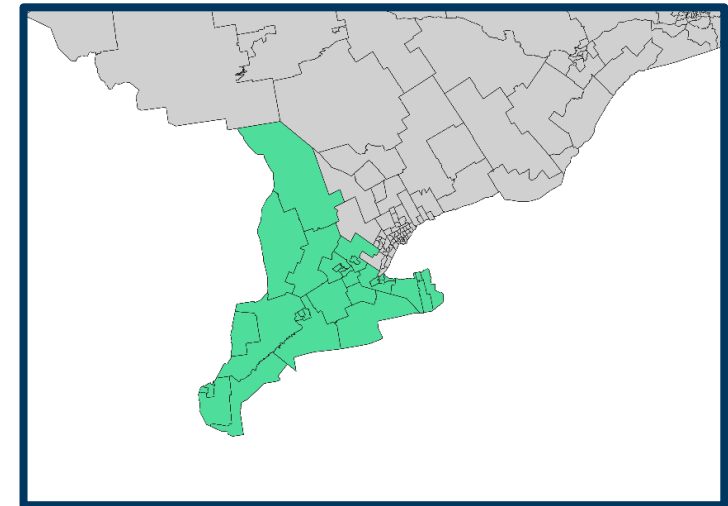


Decided Vote

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



Party	Current Seats	Close Seats (won by <10 points)
Liberal	11	5
CPC	15	9
NDP	6	3

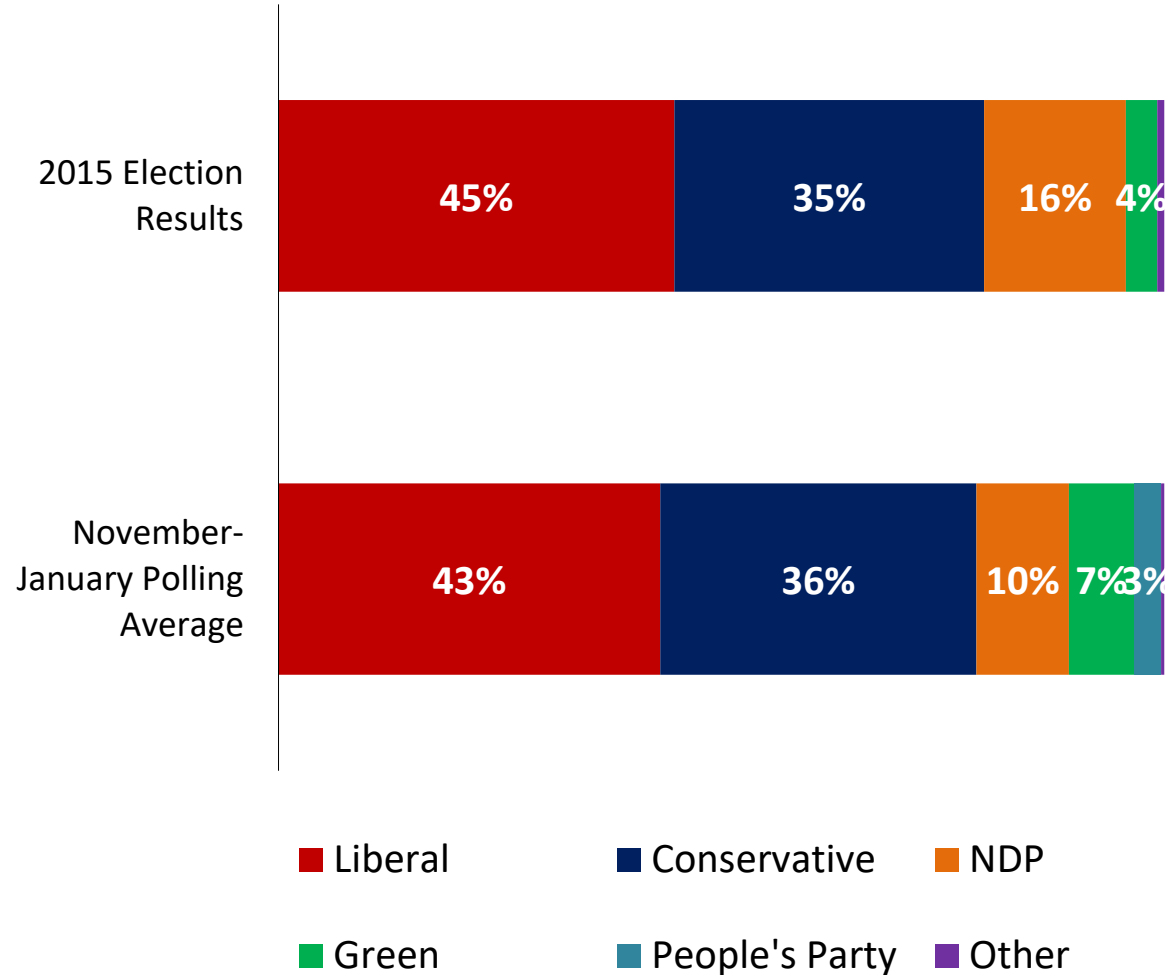


Ontario North/East: Vote for the Liberals and Conservatives is stable since 2015; NDP are down to 10% as Green Party is up to 7%

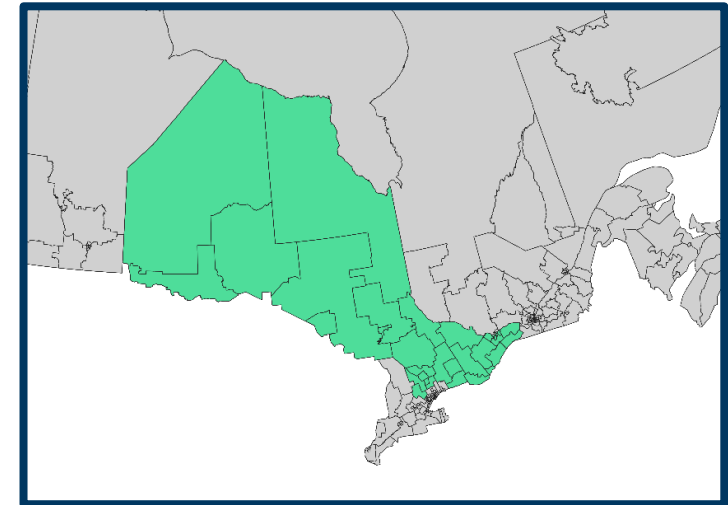


Decided Vote

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



Party	Current Seats	Close Seats (won by <10 points)
Liberal	20	6
CPC	13	8
NDP	2	2

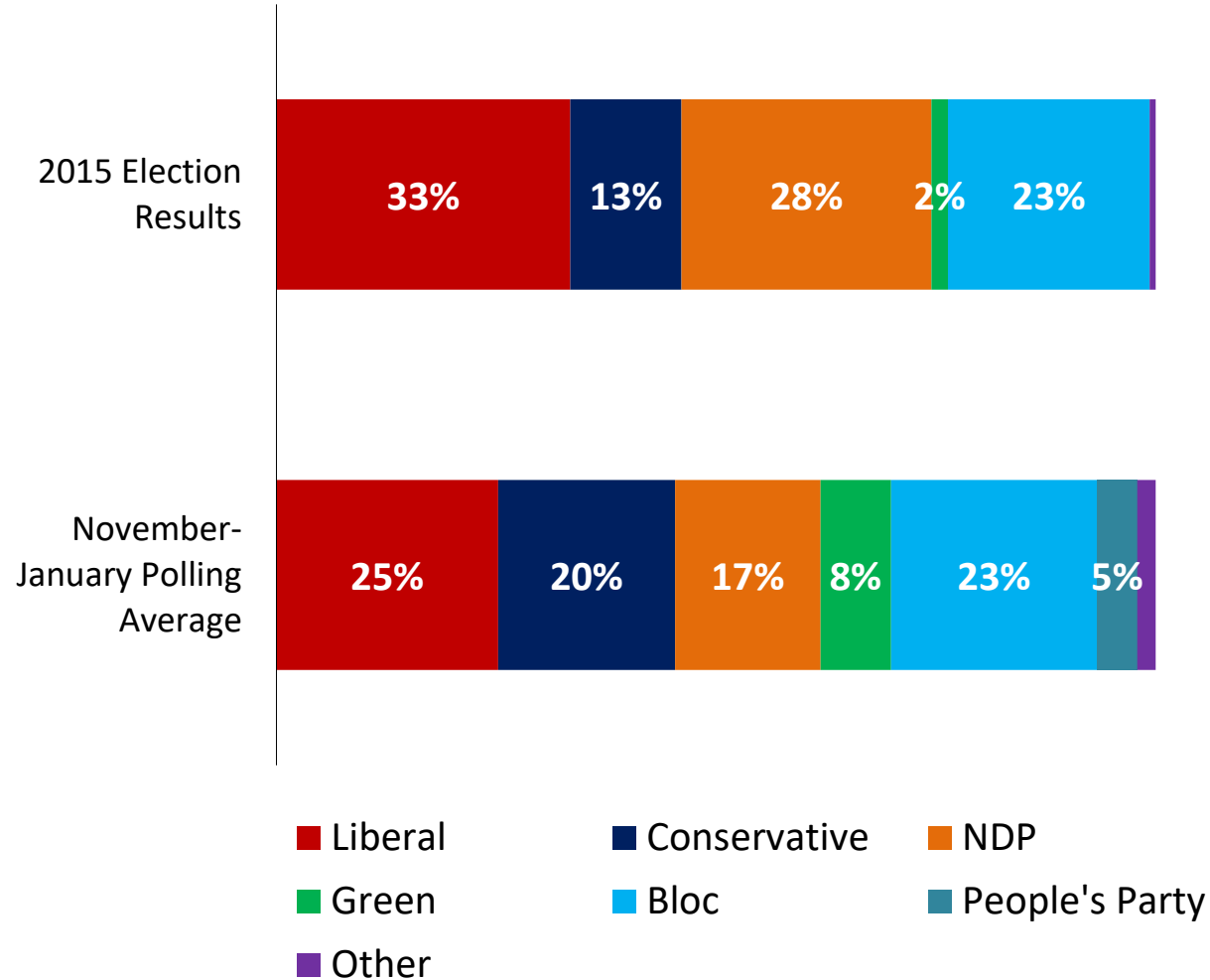


Rural Francophone Quebec: Liberal and NDP decline since 2015 has resulted in a four way race for rural francophone voters

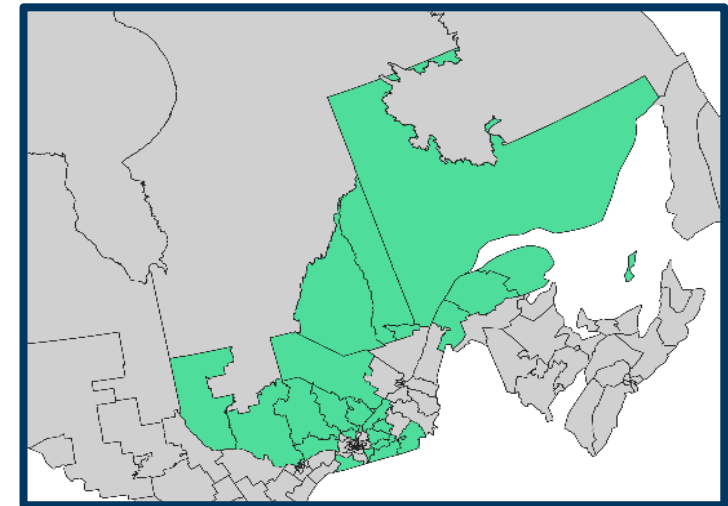
Q

Decided Vote

[Showing the results of the last three CTM surveys; combined n=230]



Party	Current Seats	Close Seats (won by <10 points)
Liberal	12	5
CPC	1	1
NDP	9	6
Bloc	4	2

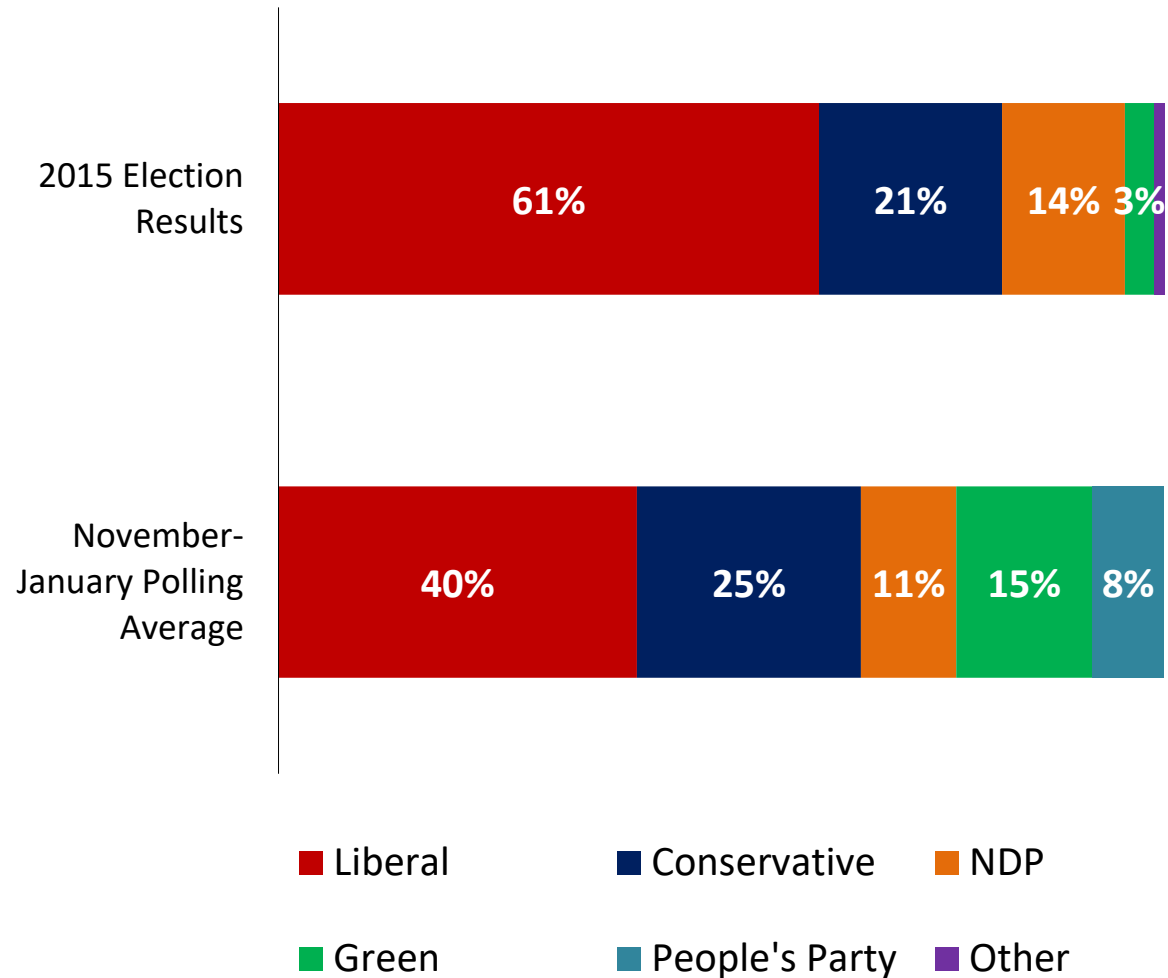


Rural Atlantic Canada: Liberals (40%) are down over 20 points since 2015, but still lead the Conservatives (25%)

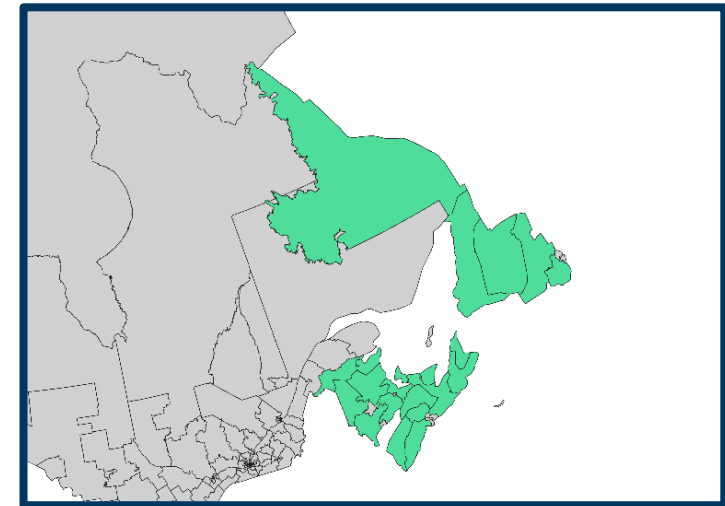


Decided Vote

[Showing the results of the last three CTM surveys; combined n=102]



Party	Current Seats	Close Seats (won by <10 points)
Liberal	22	3
CPC	0	0
NDP	0	0



Party Brands

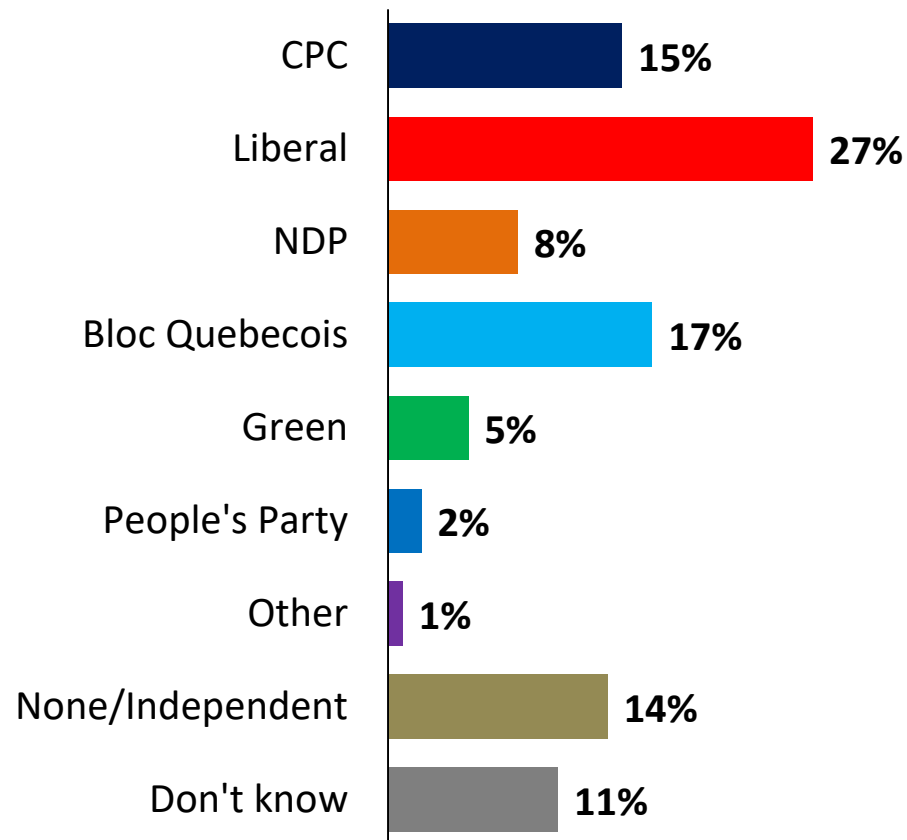
Federal ID, Quebec vs. RoC: Liberals lead both inside and outside Quebec; Conservatives 2nd in RoC, but trail the BQ in Quebec

Q

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

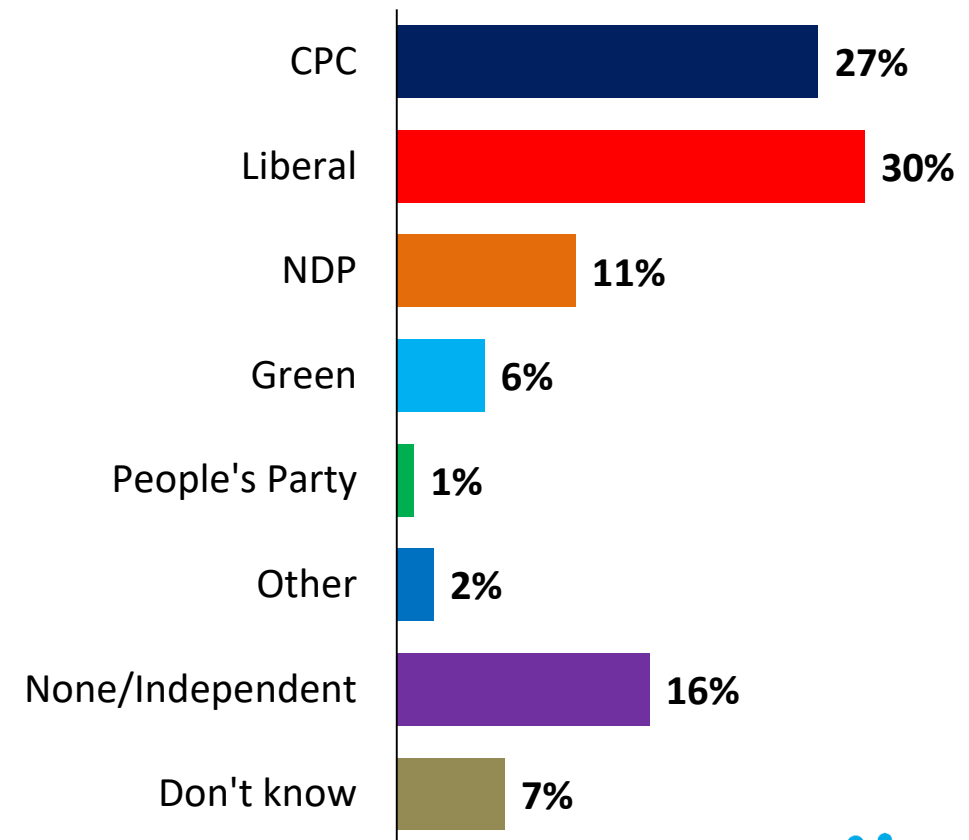
[Showing the results of the last three CTM surveys, combined n=3,600]

Quebec



n=840

Rest of Canada



n=2,760

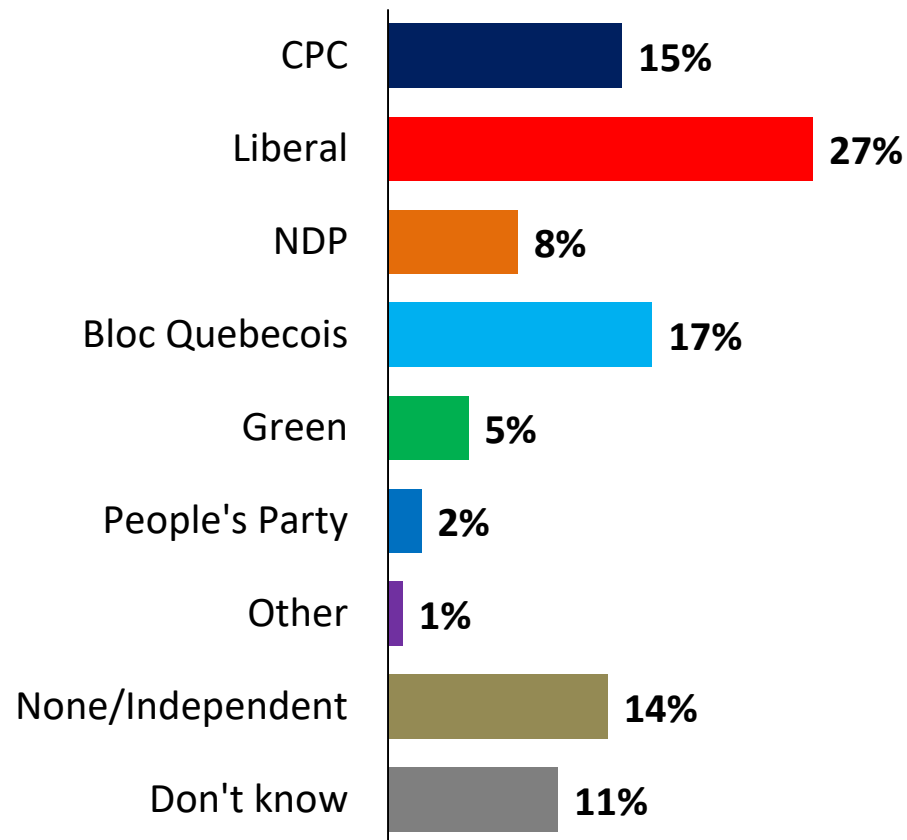
Federal ID, Quebec vs. Rural Francophone: While Liberals lead by a solid margin overall, in rural francophone seats they only lead by 4 points

Q

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

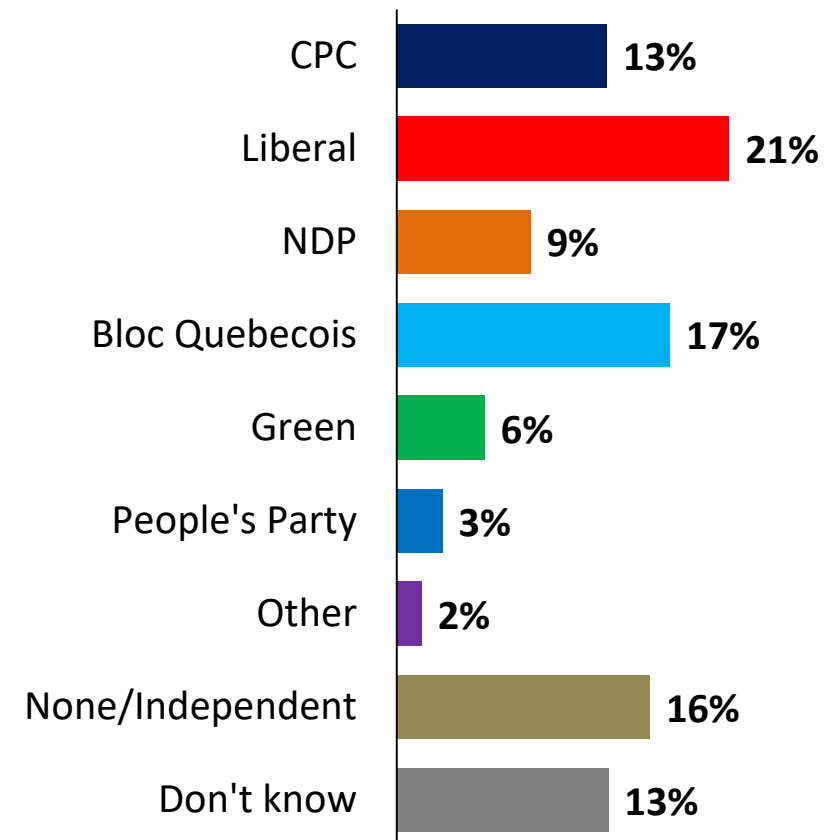
[Showing the results of the last three CTM surveys, combined n=3,600]

Quebec



n=840

Rural Francophone



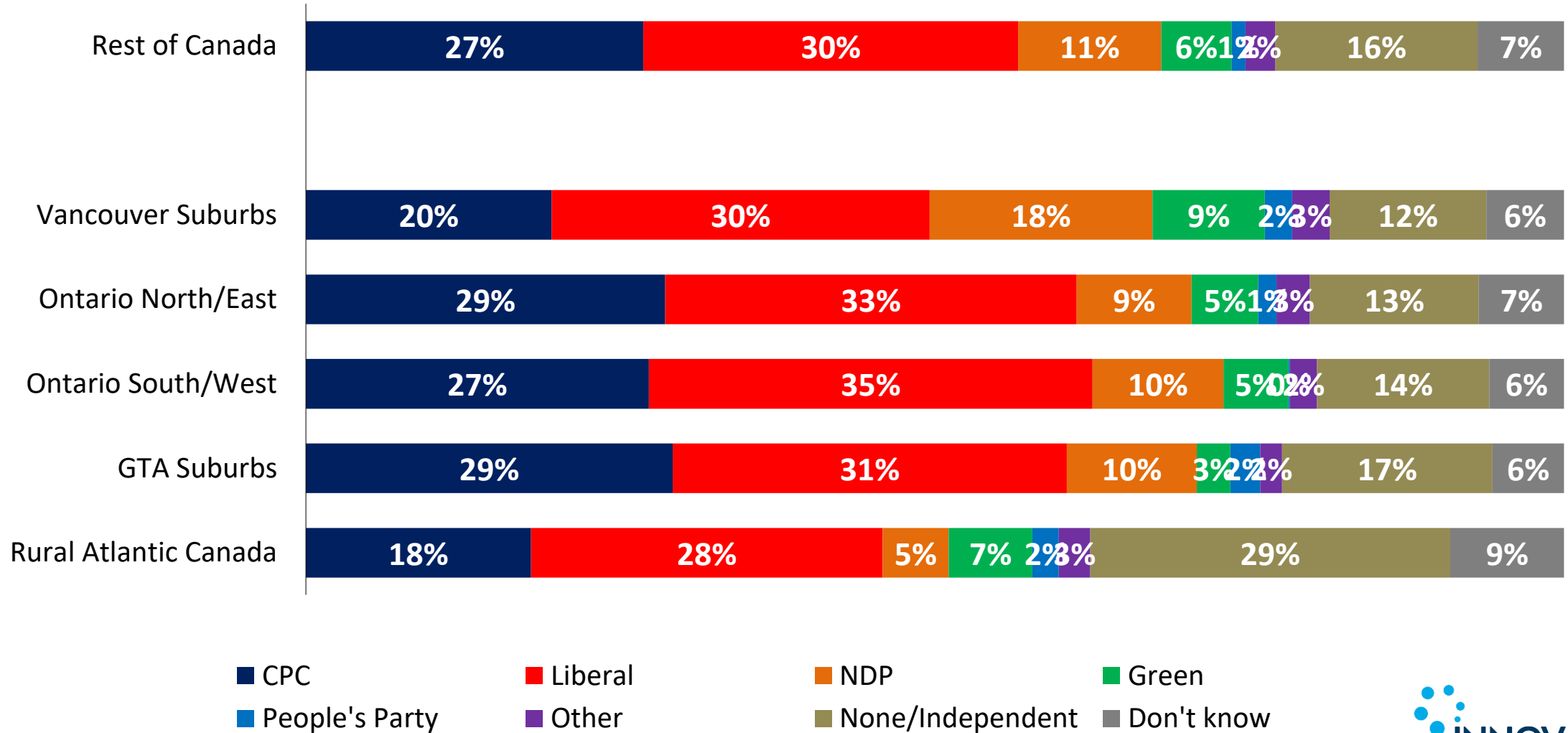
n=277

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

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]

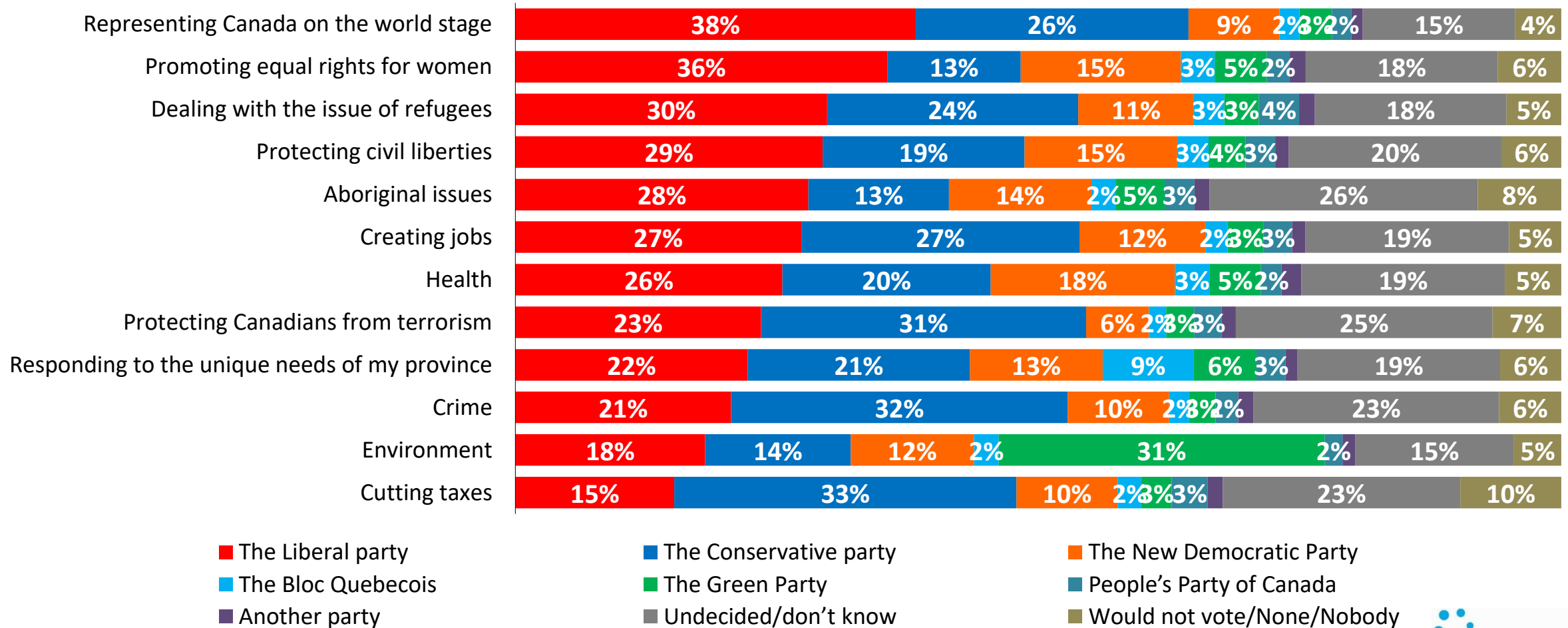


Party Attributes: Liberals hold 12-point lead on representing Canada on world stage; CPC lead on taxes & domestic safety

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 ?

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



Economic Attitudes

Segmentation Attitudes: 51% of Canadians agree that no matter how hard they work, it's more difficult every year to get by



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



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



Strongly agree

Somewhat disagree

Somewhat agree

Strongly disagree

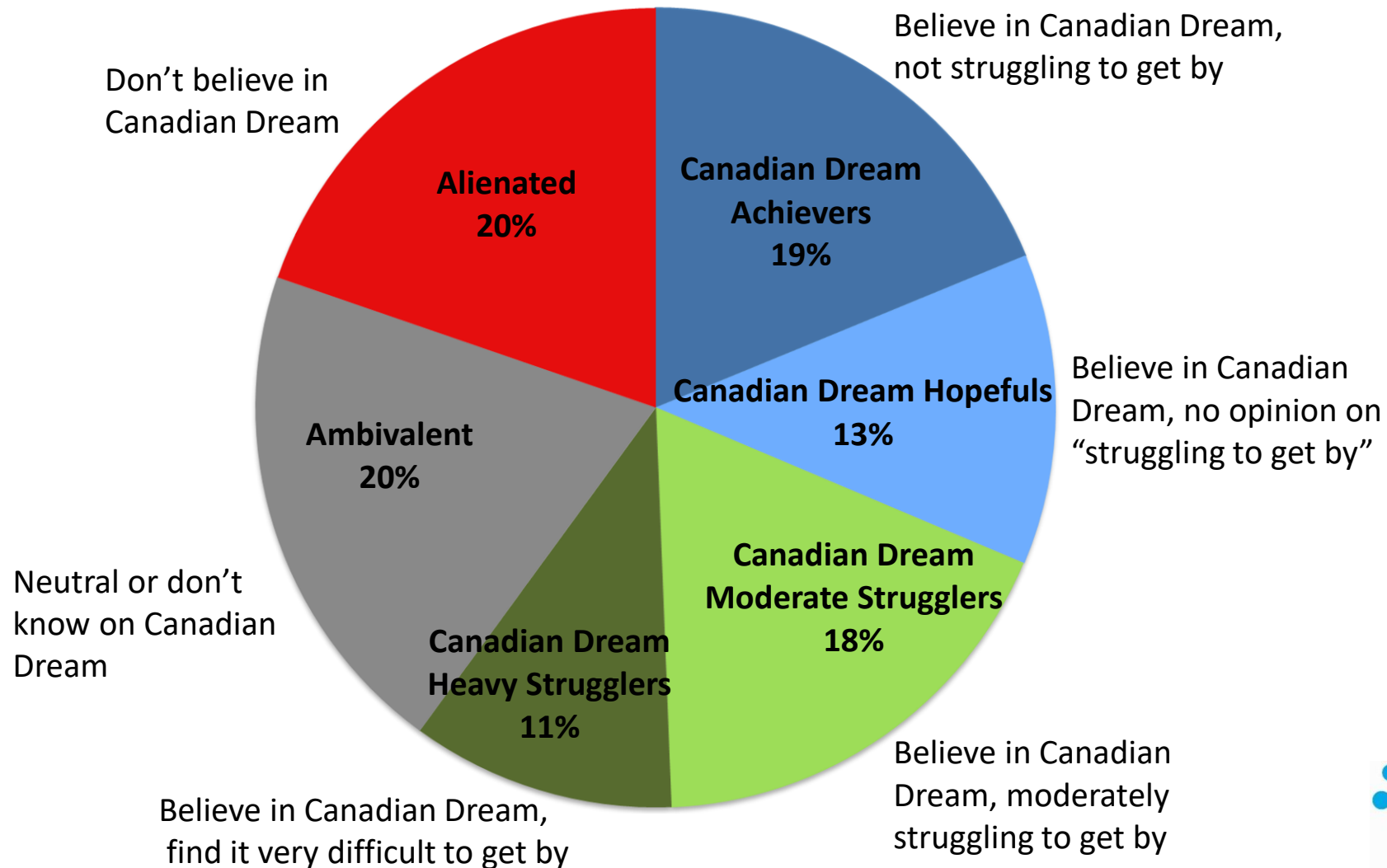
Neither agree nor disagree

Don't know

Gap Segmentation: 1-in-5 Canadians do not believe in the Canadian Dream

Q

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”.



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

Q

Combined Vote BY Gap Segmentation

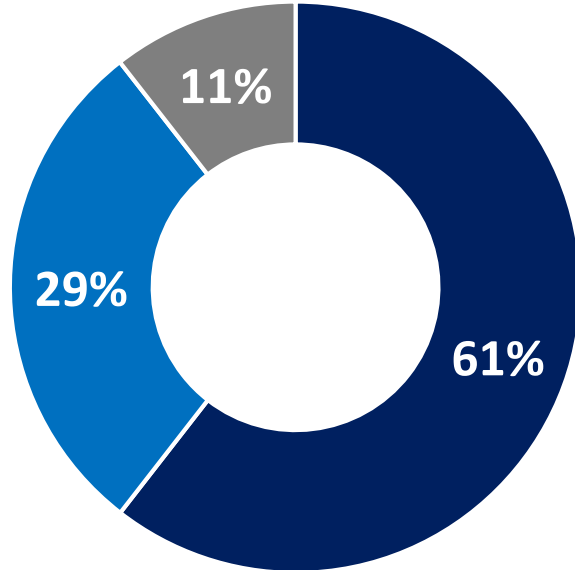
Column %	Overall	Canadian Dream Achievers	Canadian Dream Hopefuls	Canadian Dream Moderate Strugglers	Canadian Dream Heavy Strugglers	Ambivalent	Alienated
Liberal	33%	44%	34%	31%	25%	29%	30%
Conservative	27%	29%	32%	35%	27%	21%	22%
NDP	10%	6%	6%	11%	13%	9%	16%
Bloc Quebecois	4%	4%	4%	5%	8%	3%	3%
Green Party	7%	4%	6%	6%	6%	8%	10%
People's Party	4%	3%	6%	4%	3%	3%	5%
Other	1%	0%	0%	1%	0%	1%	0%
Undecided/DK	11%	8%	9%	7%	14%	17%	10%
Would not vote/None	4%	2%	3%	1%	4%	8%	4%

Values

Free Enterprise: Building the Index

Q

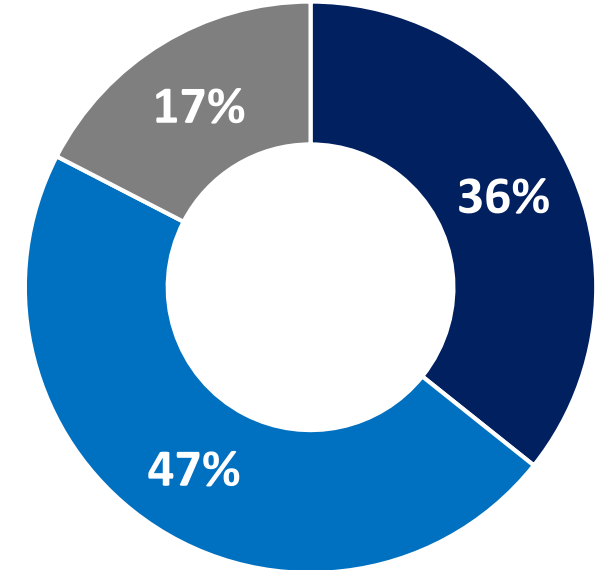
Is the main role of government to...?



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

Q

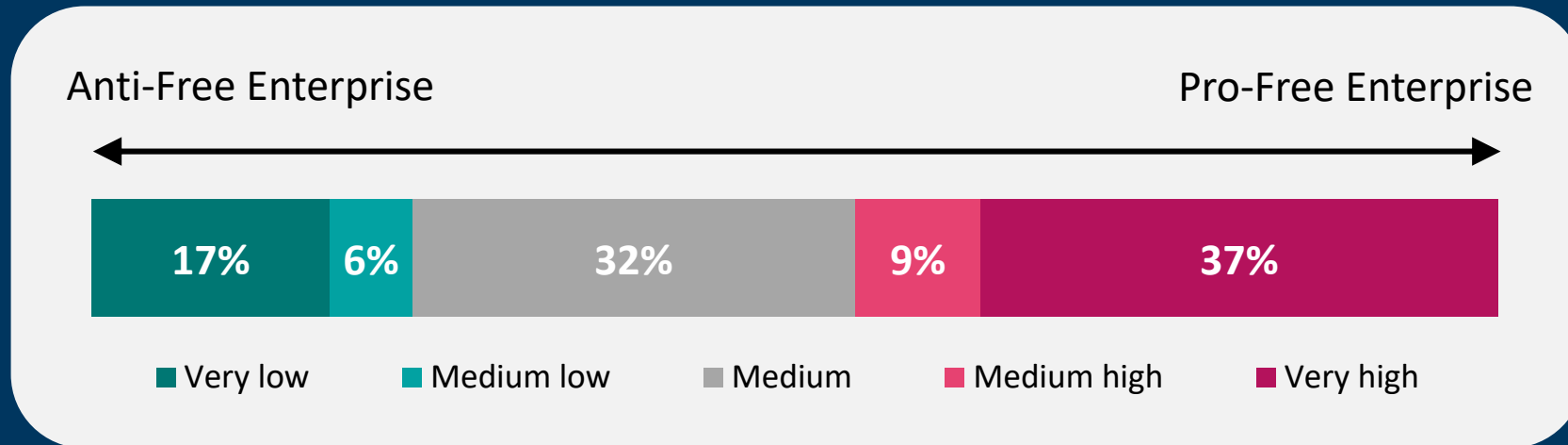
Which of the following statements comes closest to your view?



- The profit system brings out the worst in human nature.
- The profit system teaches people the value of hard work and success.
- Don't Know

Free Enterprise Index

Respondents were far more likely to be pro-free enterprise than against it, with net +23% high on the Index.



Net Score
+23%

Combined Vote by Free Enterprise: The Liberals lead at all levels of the Free Enterprise Index except for 'high'

Q

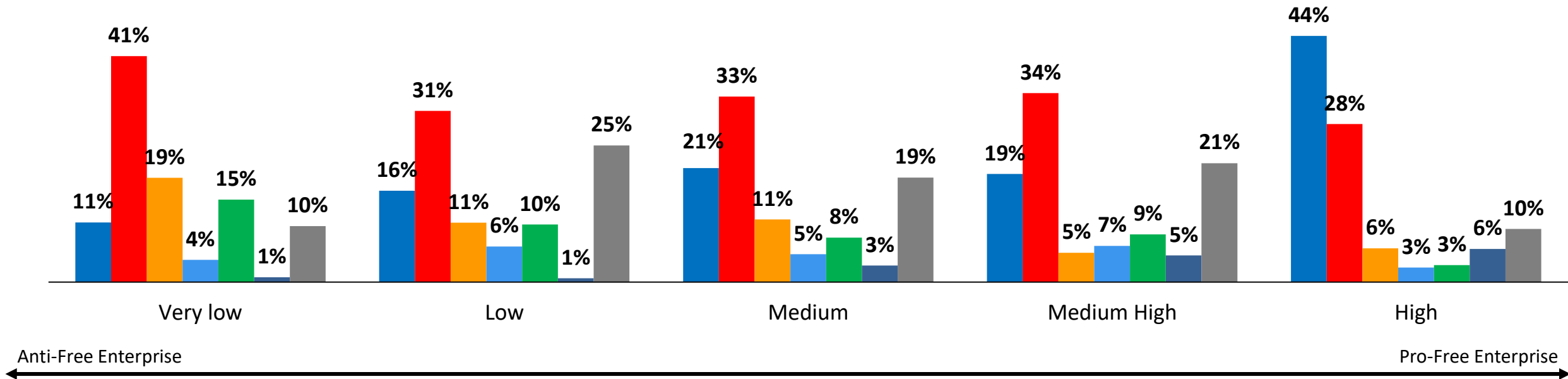
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Free Enterprise Index (2 questions):

- Agree: Role of government is to create equal opportunity
- Agree: Profit system teaches the value of hard work

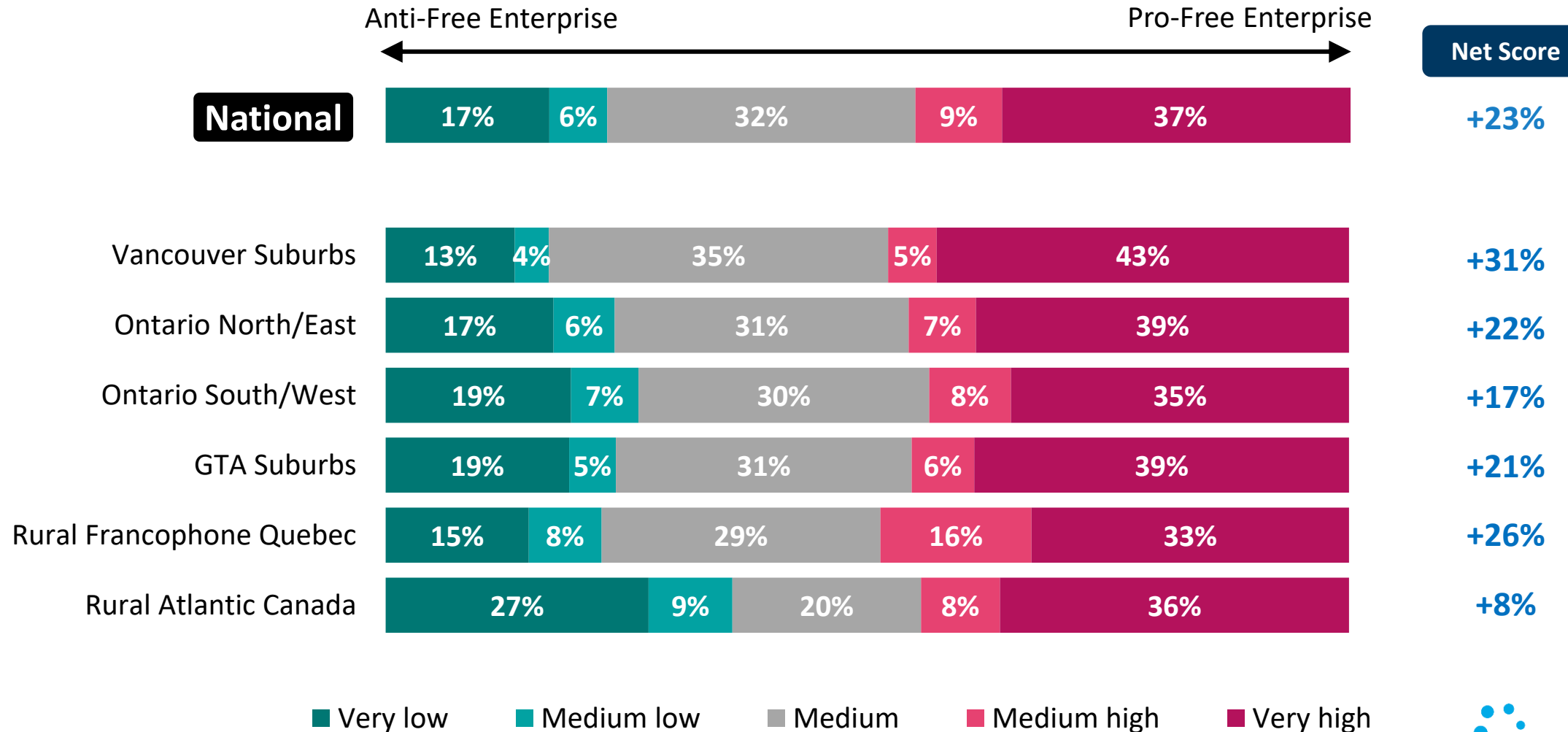
Conservative Liberal NDP Bloc Quebecois Green/Other People's Party Unaligned



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



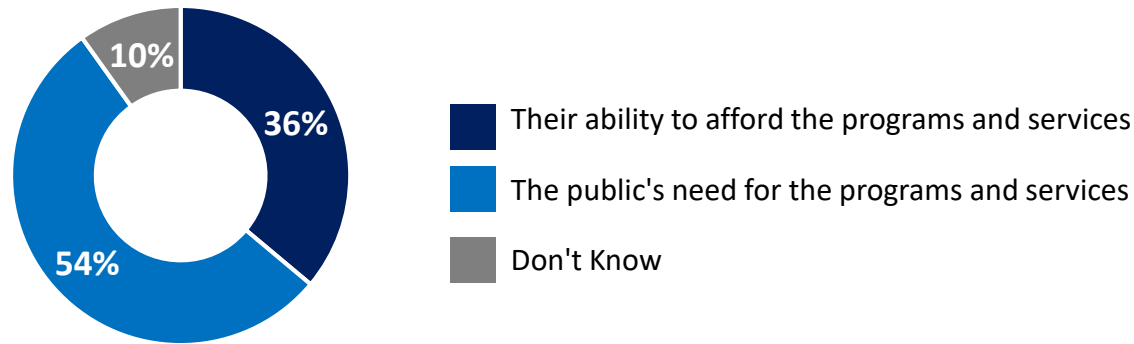
Free Enterprise Index by Region



Fiscal Conservatism: Slight majority of respondents are fiscally liberal;⁴⁴ 43% of fiscal liberals say they would vote for the Liberals

Q

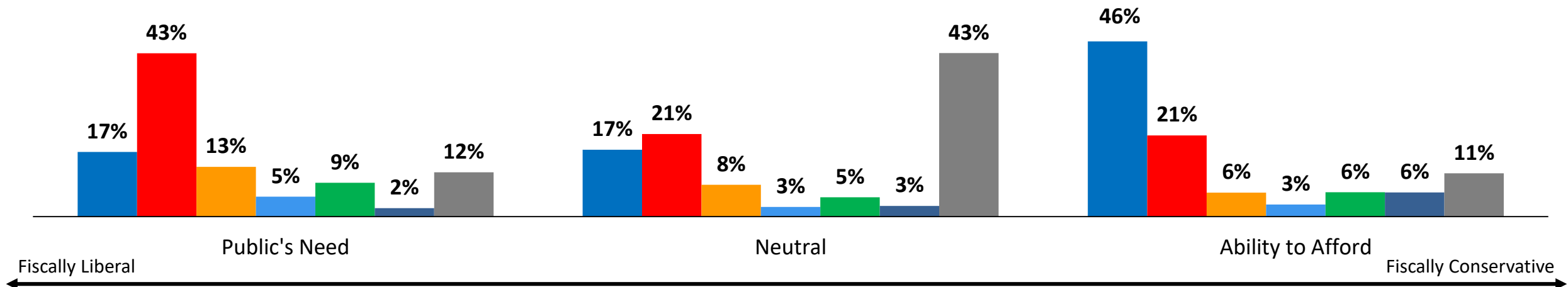
When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?



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 Fiscal Conservatism:

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

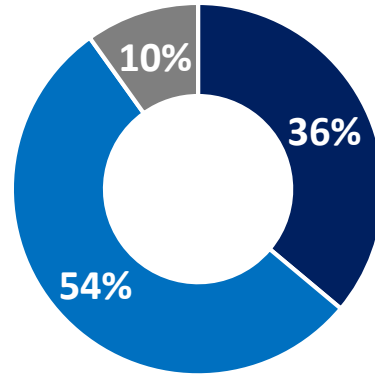


Fiscal Conservatism by Key Region: The GTA and Rural Atlantic region are the most fiscally conservative key regions

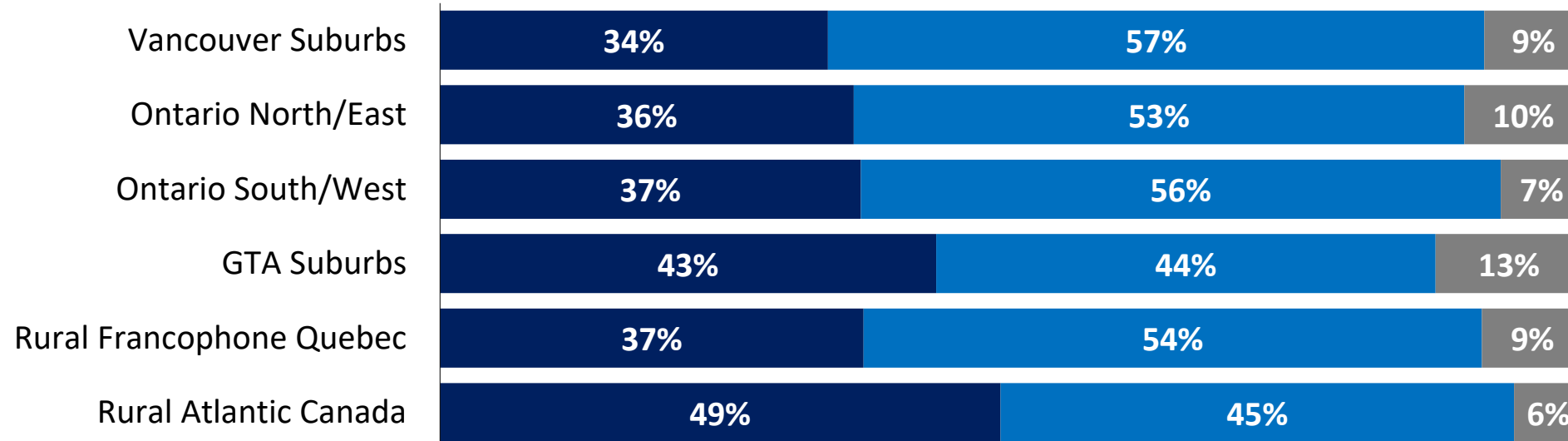
Q

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

National



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



Authoritarianism: Building the Index

Q Do you agree or disagree with the following statements?

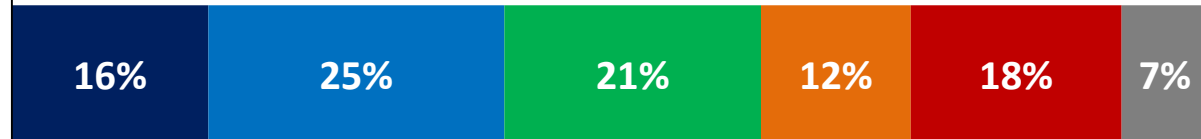
Everything is changing too fast today



Net Agreement

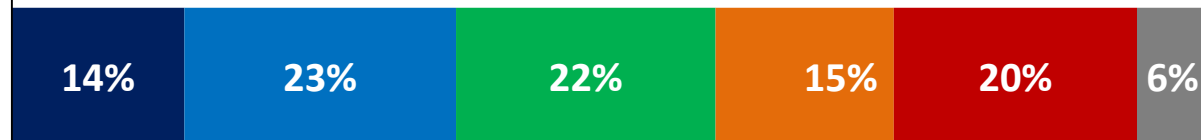
+23%

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



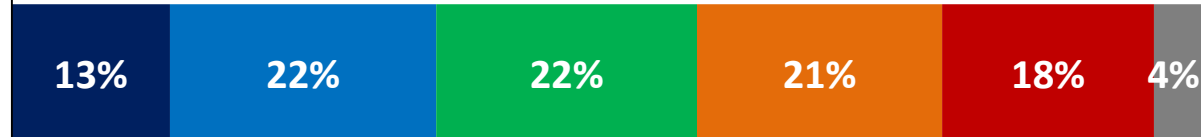
+11%

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



+2%

The 'old-fashioned ways' and 'old-fashioned values' still show the best way to live

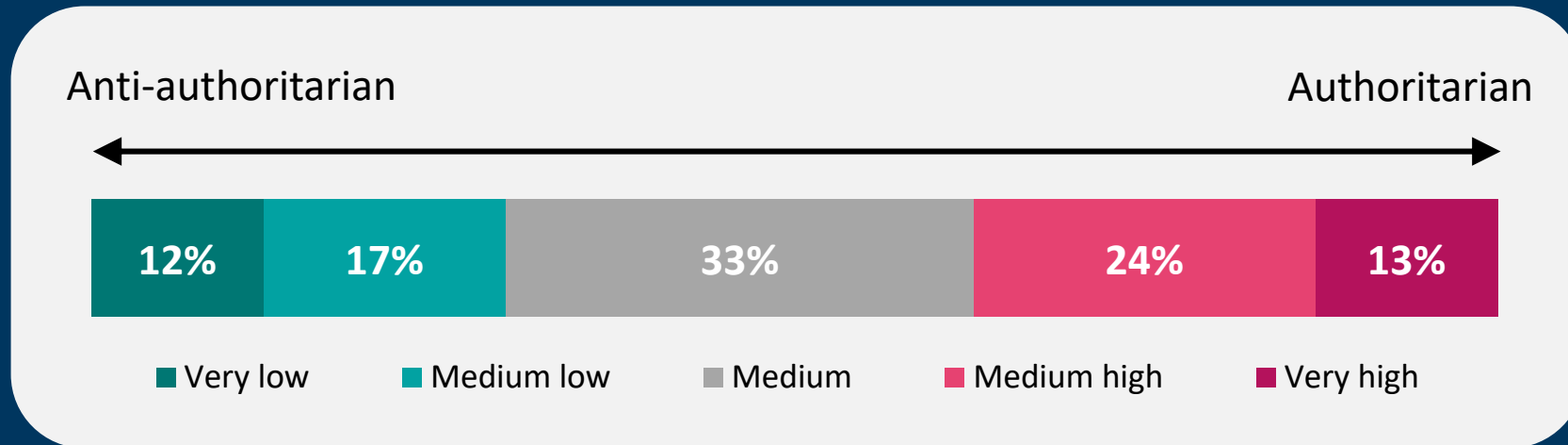


-3%

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

Authoritarianism Index

37% of respondents are at least somewhat authoritarian.



Net Score
+8%

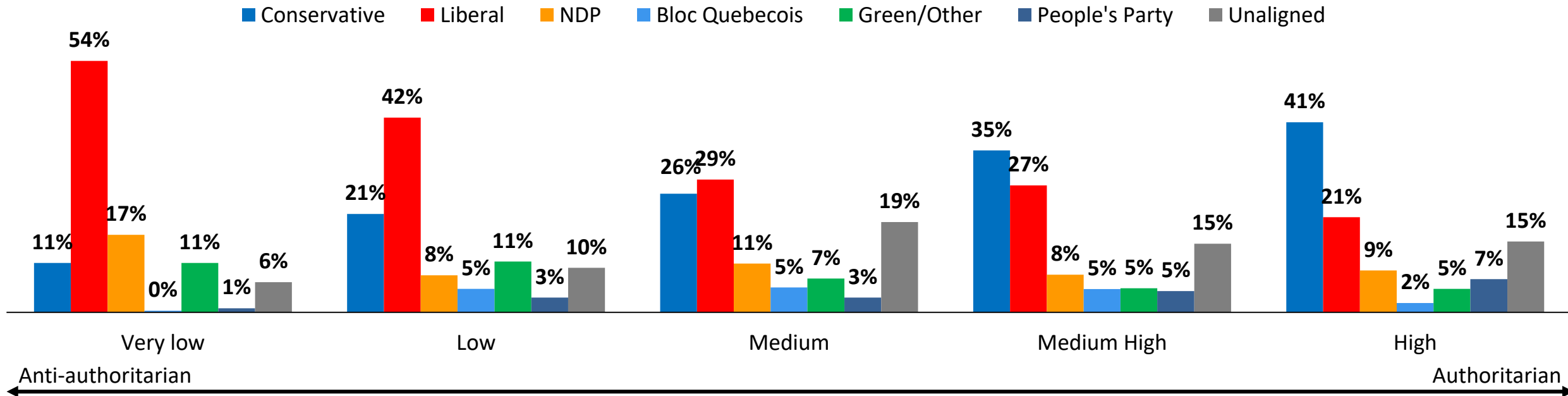
Combined Vote by Authoritarianism: Over half of those who are very low on the Authoritarian Index would vote Liberal

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

Authoritarian Index (4 questions):

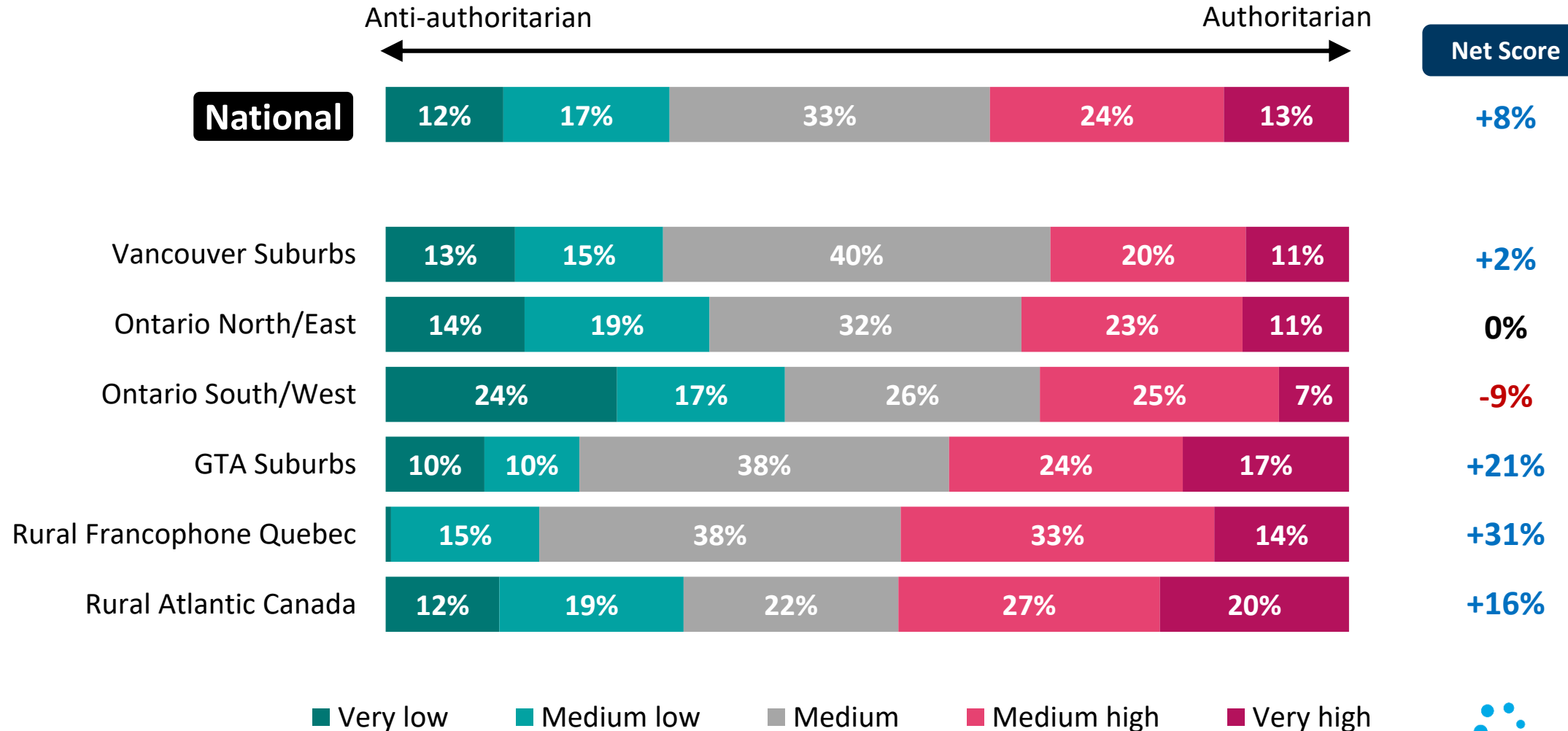
- Agree: Honour ways of forefathers, do what authorities tell us and get rid of rotten apples
- Agree: Old-fashioned ways and values still best way to live
- Agree: Country needs strong leader to destroy negative forces, silence troublemakers spreading bad ideas
- Agree: Everything is changing too fast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



Authoritarianism Index by Key Region: The GTA Suburbs and Rural Francophone Quebec are both far more authoritarian than the nation

Q

Authoritarianism Index by Region



Nativism: Building the Index

Q

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

Q

Do you agree or disagree with the following statements?

Immigrants should adapt to Canadian society and not the other way around

42%

29%

16%

7%

3%

+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%

26%

16%

12%

13%

3%

+31%

This item reversed in index

Immigrants take jobs away from other Canadians

10%

14%

20%

21%

31%

4%

-28%

Strongly agree

Somewhat agree

Neither agree nor disagree

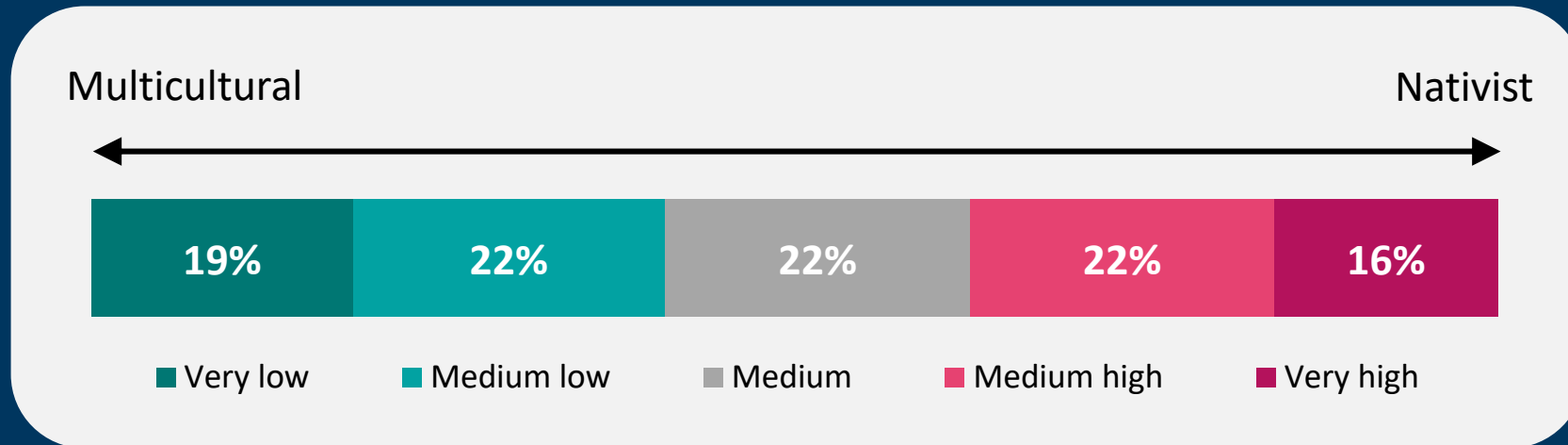
Somewhat disagree

Strongly disagree

Don't know

Nativism Index

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

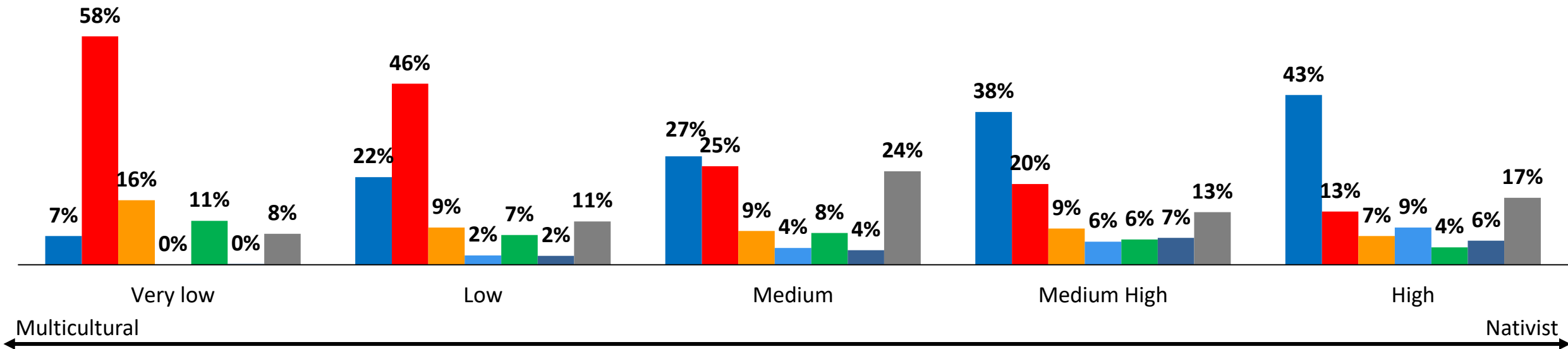
Q

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

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

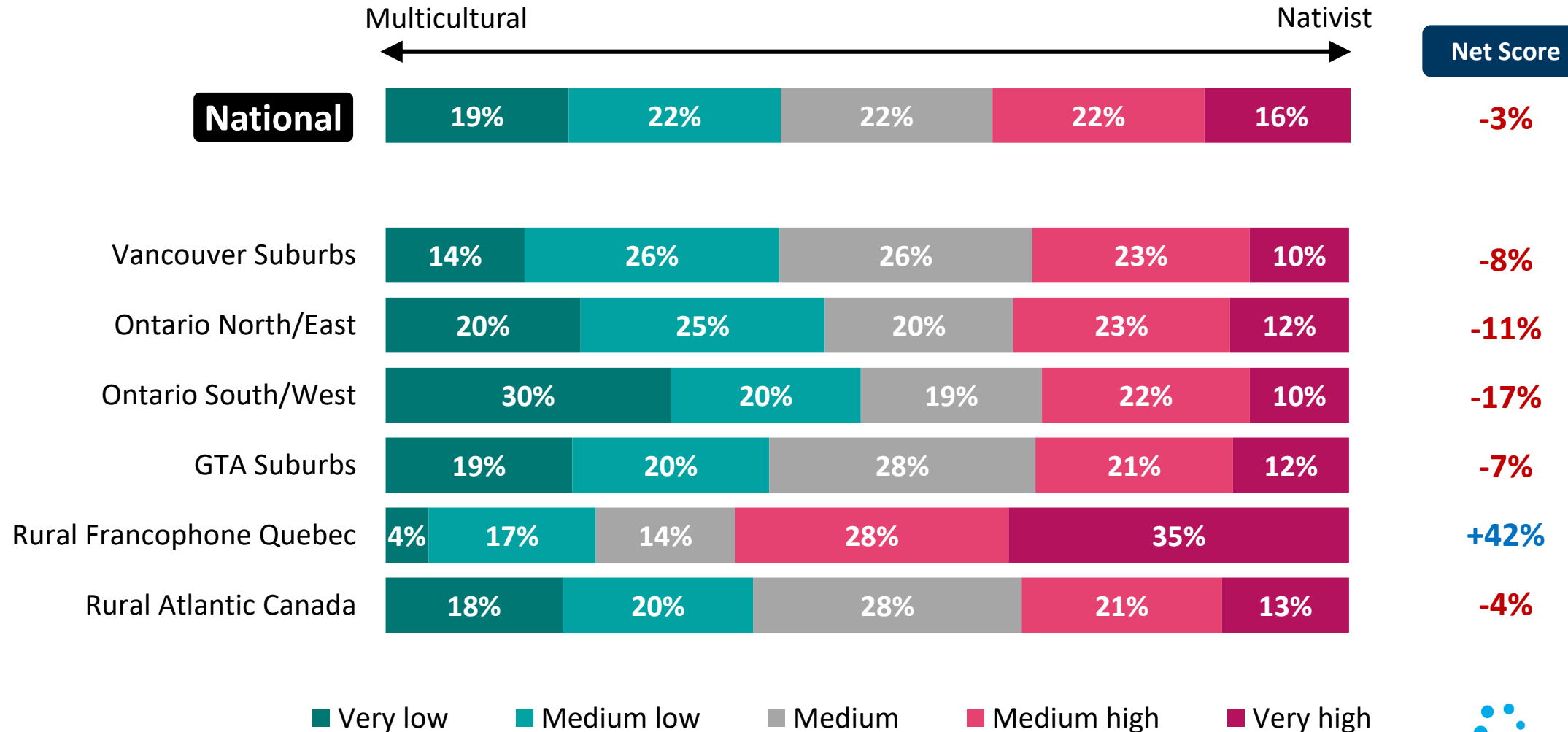
Conservative Liberal NDP Bloc Quebecois Green/Other People's Party Unaligned



Nativism Index by Key Region: Rural Francophone Quebec is far more nativist than the country as a whole and the other key regions

Q

Nativism Index by Region



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

■ Waste some of it

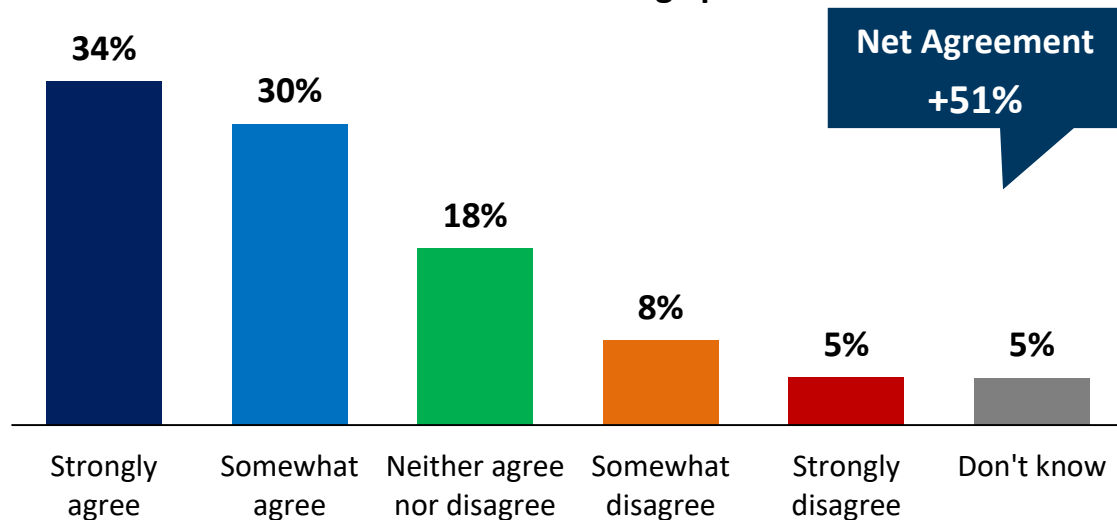
■ Don't waste very much of it

■ Don't know

Q

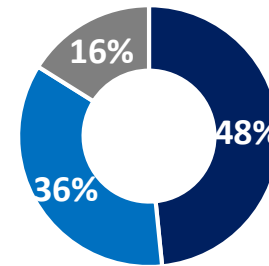
Do you agree or disagree with the following statements?

Governments care more about special interests than they do about the average person



Q

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



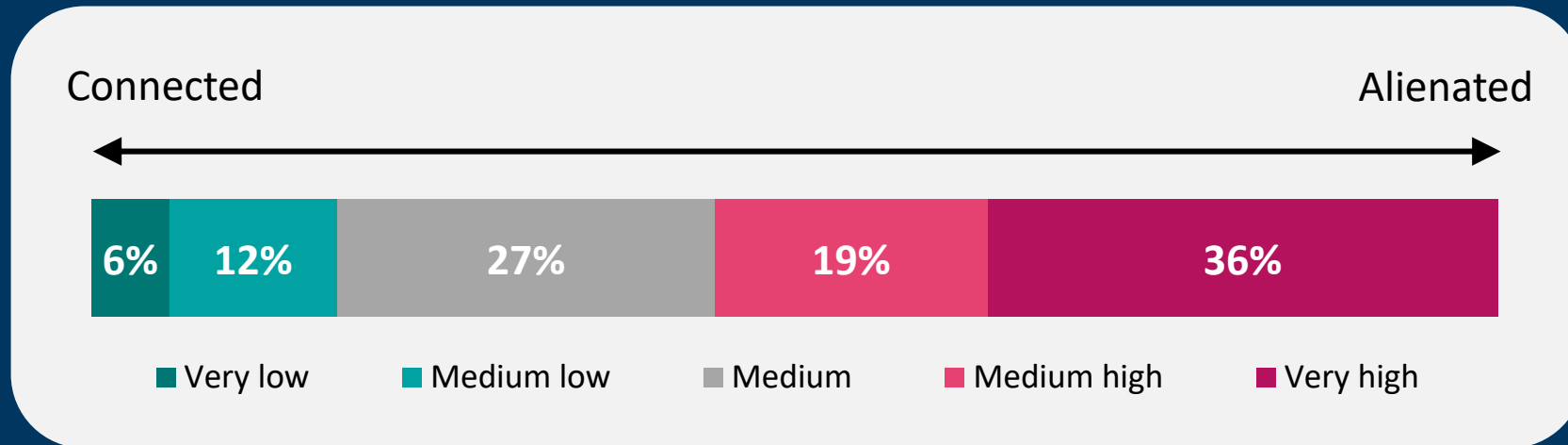
■ Too often the government listens to experts instead of common sense.

■ Provincial issues are complicated so government should listen to experts when it comes to policy.

■ Don't Know

Political Alienation Index

Over 1-in-3 respondents (36%) are very high on the Alienated Index; only 6% are very low.



Net Score
+38%

Combined Vote by Alienation: Liberals win a majority of support from both groups low on the Political Alienation Index

Q

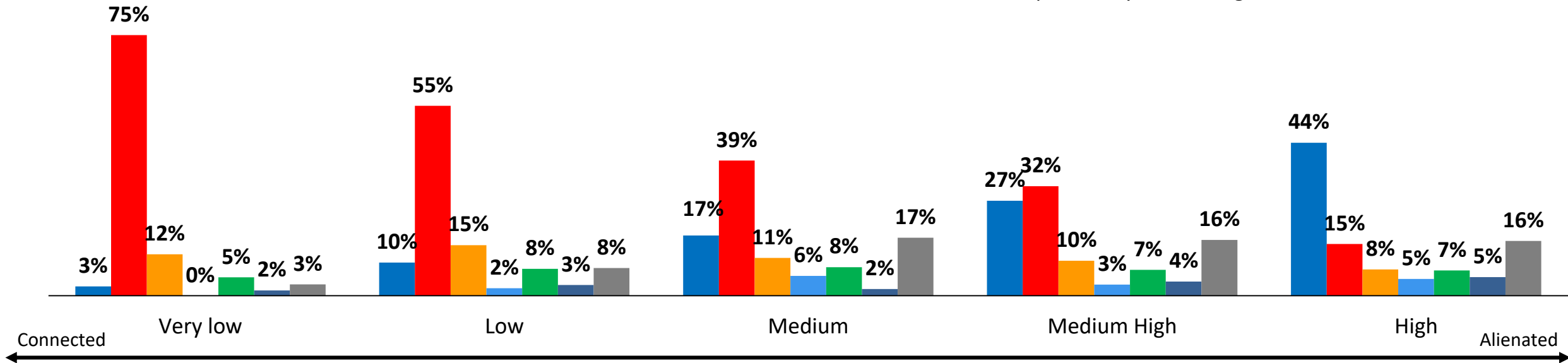
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

BY

Political 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

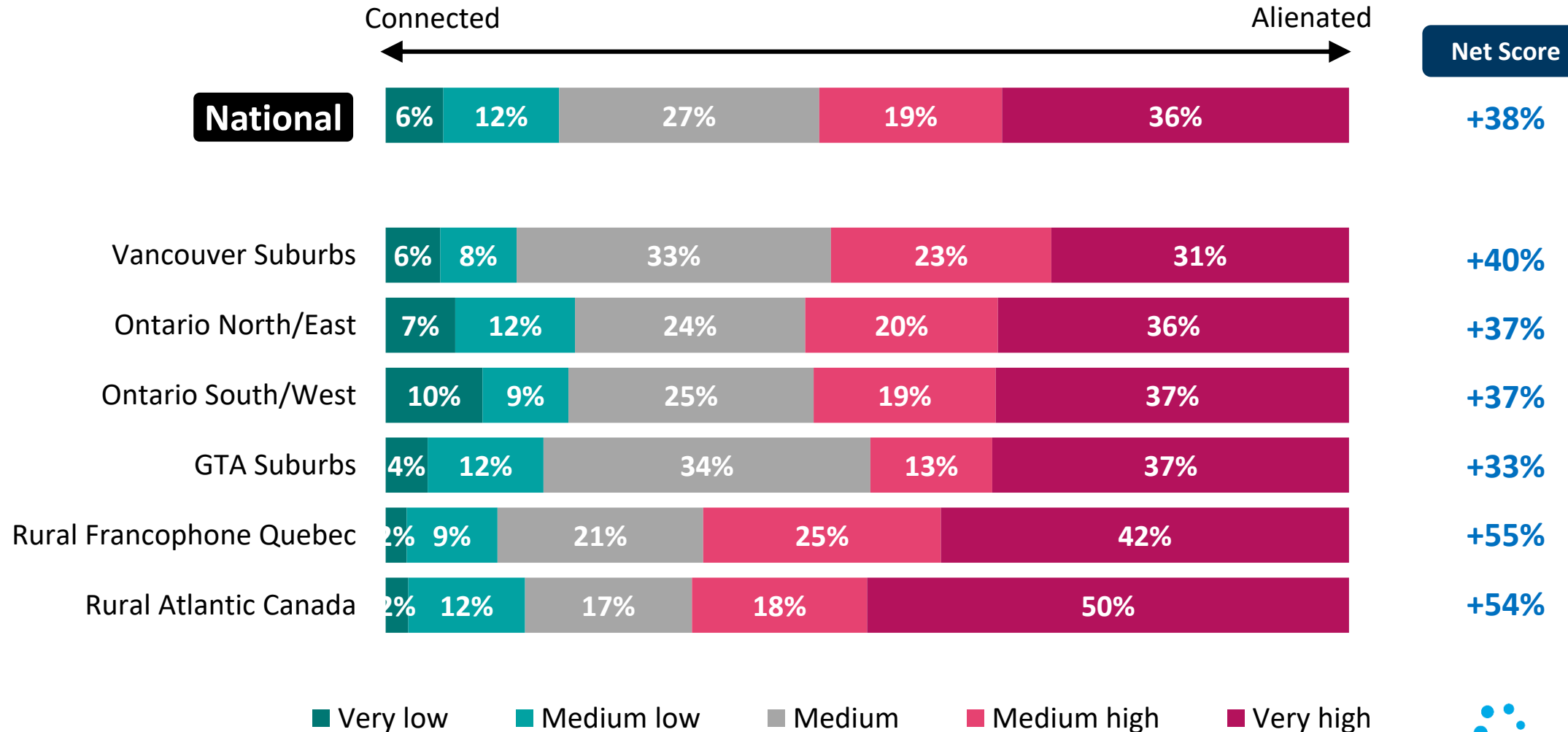
Conservative Liberal NDP Bloc Quebecois Green/Other People's Party Unaligned



Political Alienation Index by Key Region: Political alienation is strong everywhere; strongest in Rural Francophone Quebec and Rural Atlantic

Q

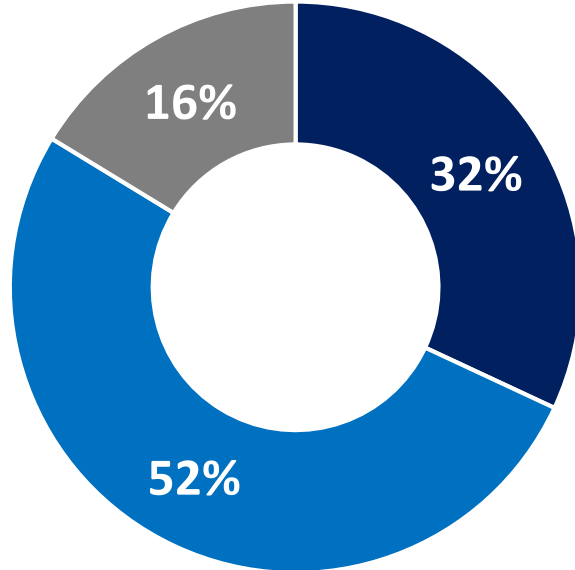
Political Alienation Index by Region



Political Inefficacy: Building the Index

Q

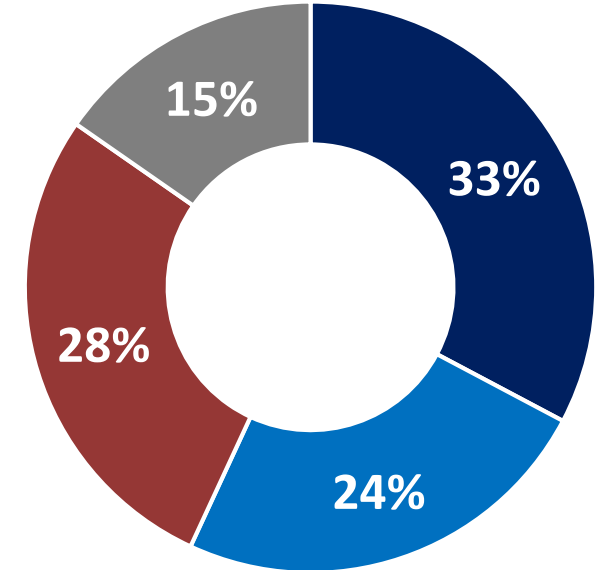
When it comes to government decision making, which of the following statements is closest to your view?



- 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

Q

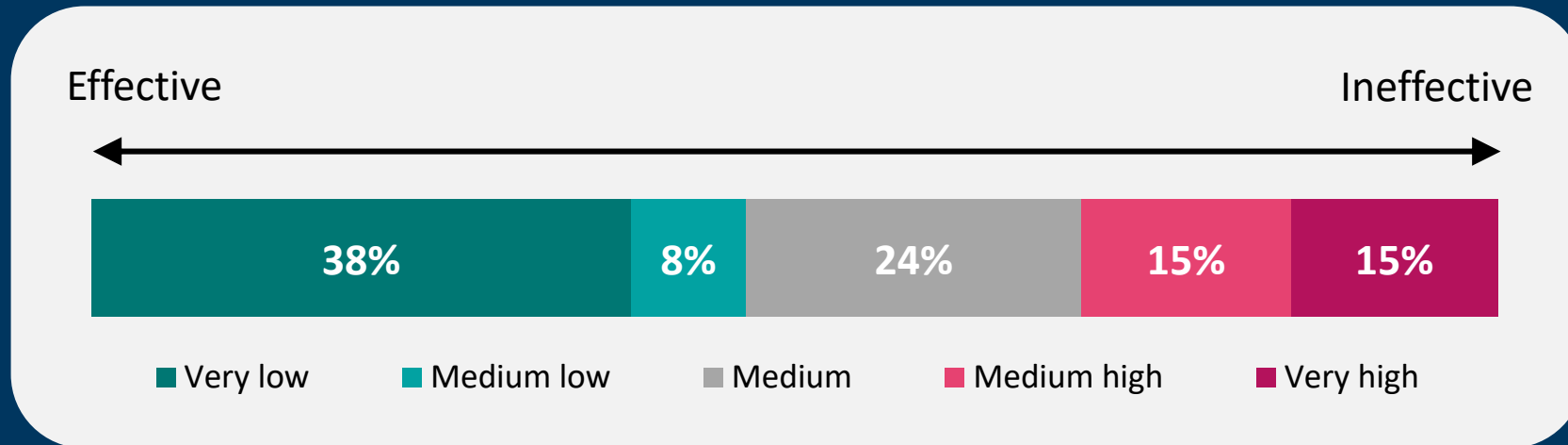
Which statement best represents your view of the political process in Canada?



- 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 politic
- It doesn't matter what you do, you can't really make a difference in politics.
- Don't know

Political Inefficacy Index

38% of respondents are very low on the Inefficacy Index while only 15% are very high.



Net Score
-17%

Combined Vote by Political Inefficacy: Those who feel less effective are more likely to vote Conservative or to be unaligned

Q

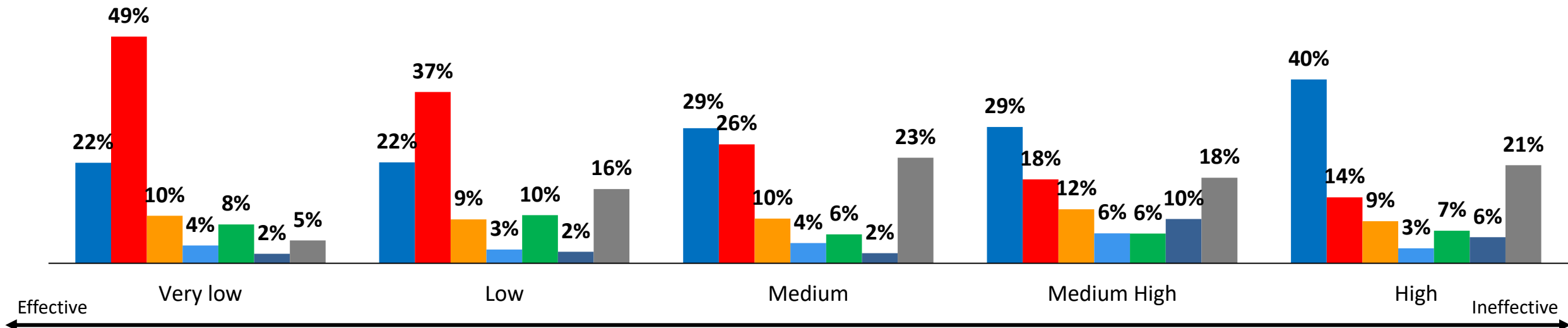
If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [VOTE + LEAN]

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

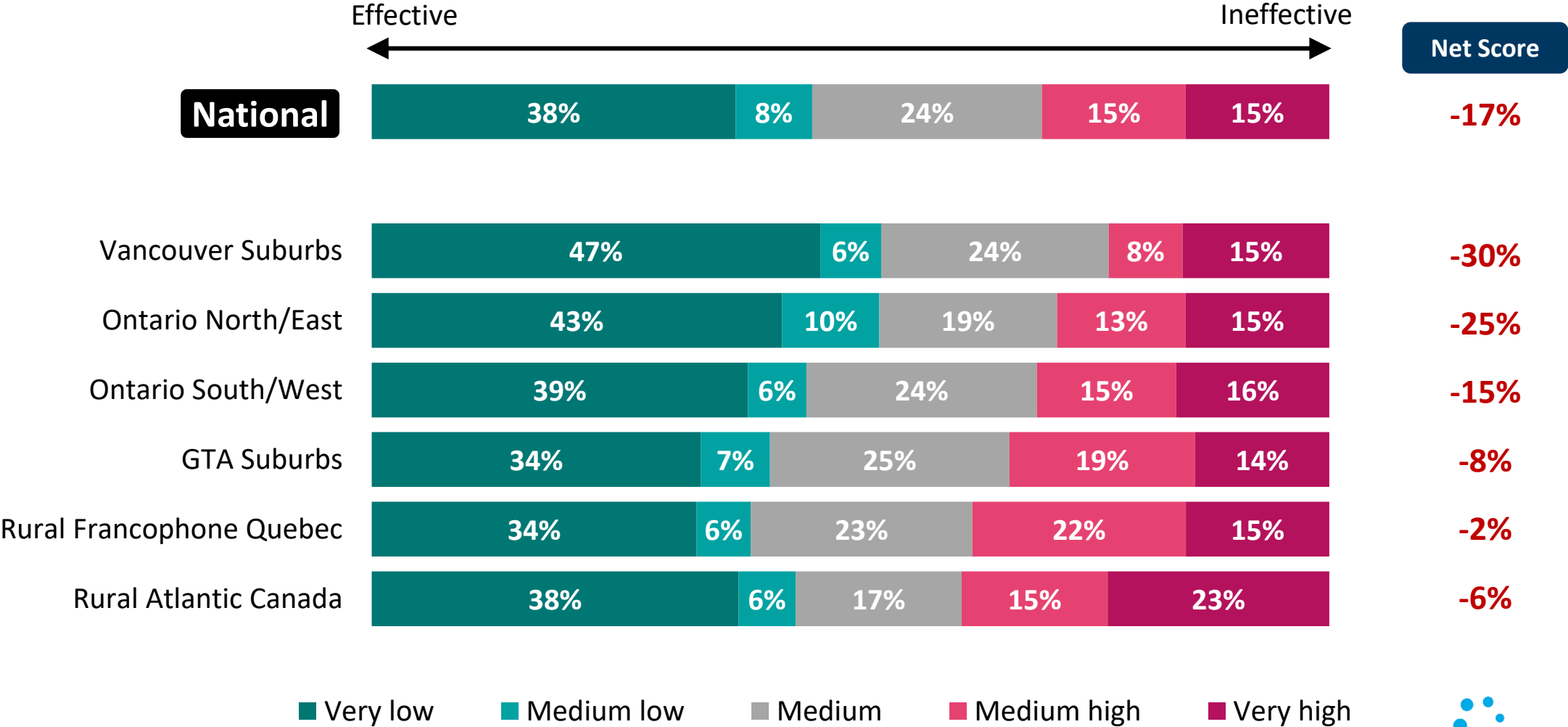
Conservative Liberal NDP Bloc Quebecois Green/Other People's Party Unaligned



Political Inefficacy Index by Key Region: All region are more likely to feel ineffective than effective



Political Inefficacy Index by Region



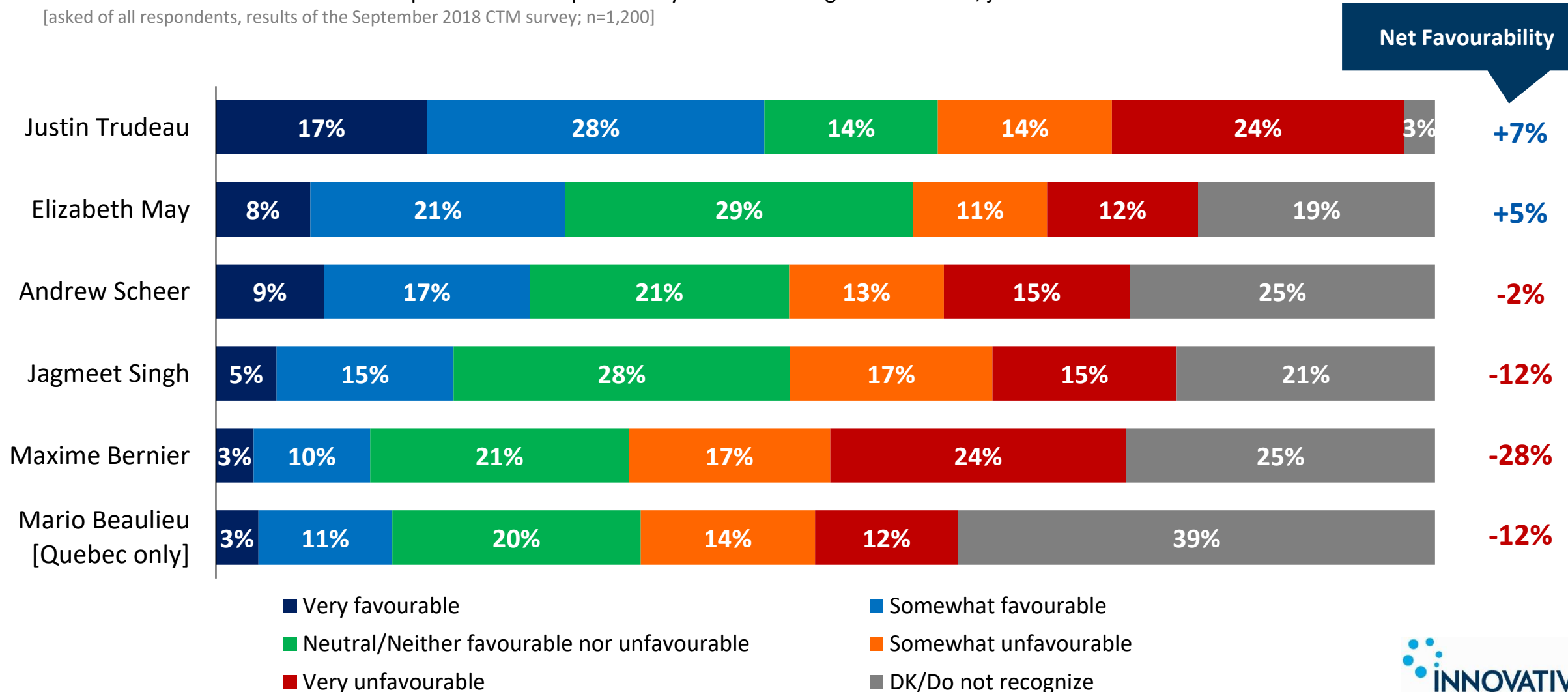
Leadership

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.

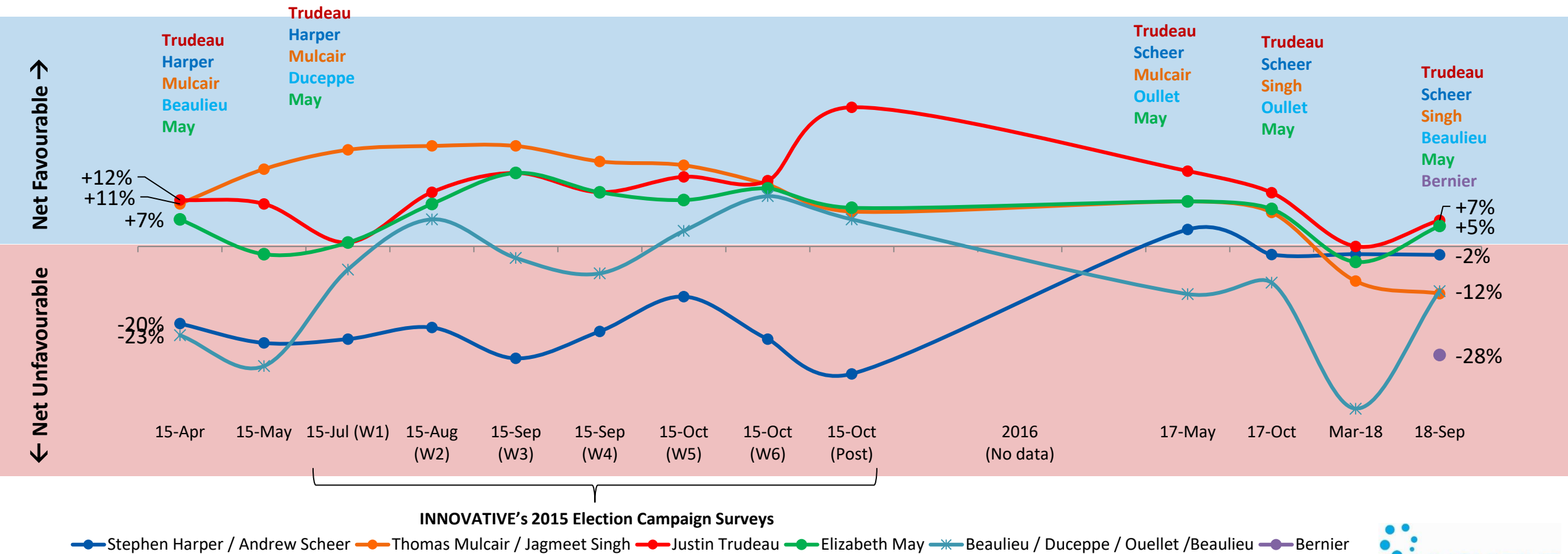
[asked of all respondents, results of the September 2018 CTM survey; n=1,200]



Net leader favourables: Dropoff after Singh takes helm of NDP; Trudeau declining but continues to lead others

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.**



Note: BQ leaders asked in **Quebec Only**.

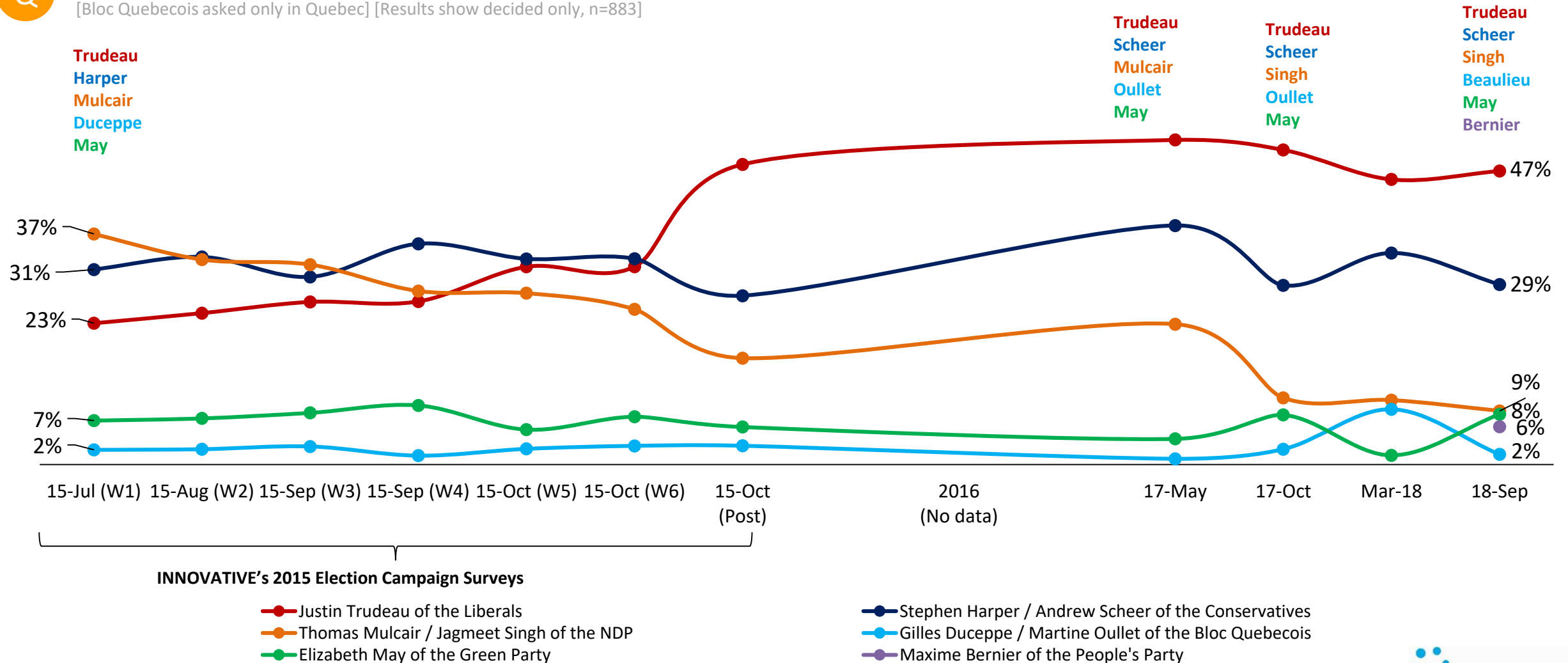
... : indicates a change in party leader during tracking

Best Prime Minister- Decided: Trudeau remains the most popular leader with Andrew Scheer trailing double digits

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. Duceppe asked in QC only.

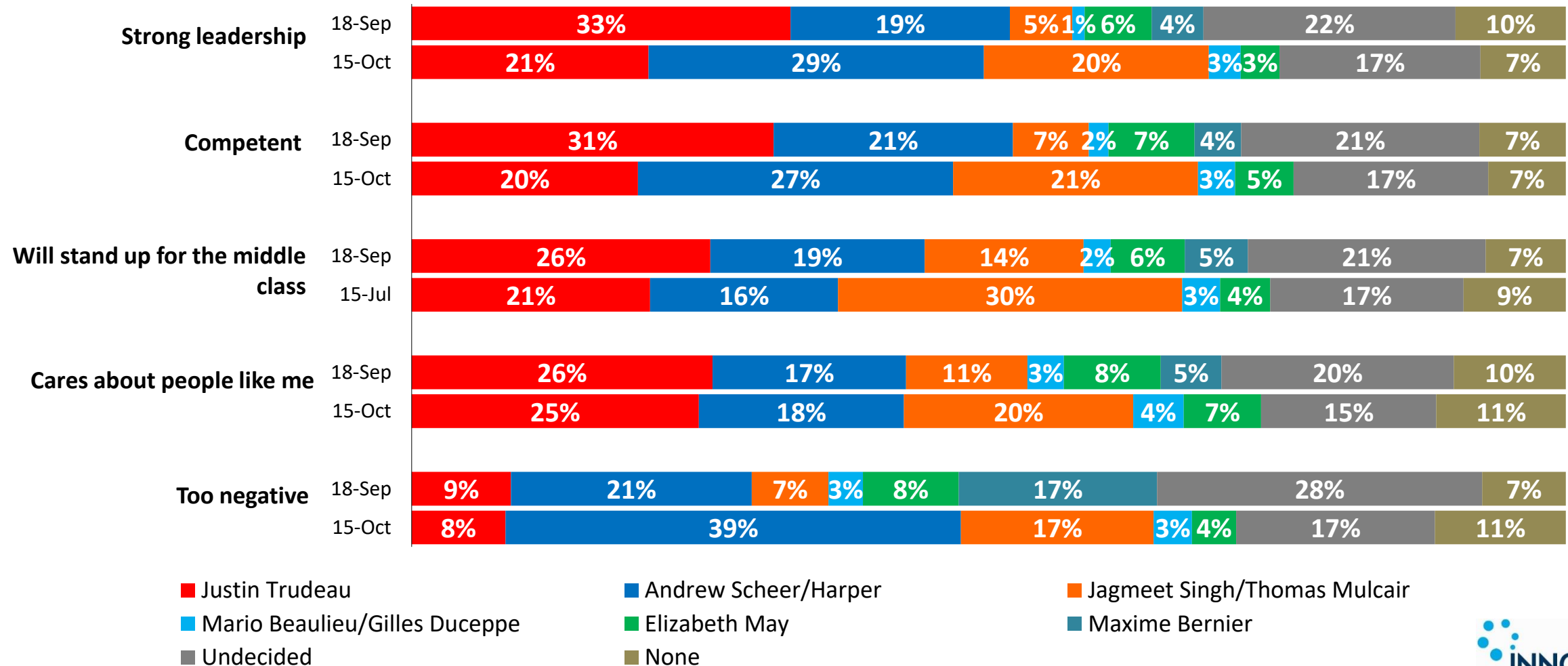
... indicates a change in party leader during tracking

Leader Attributes Tracking: Compared to 2015 pre-writ, Trudeau makes major gains on leadership & competence

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]

[results from the September 2018 CTM survey]



Carbon Pricing

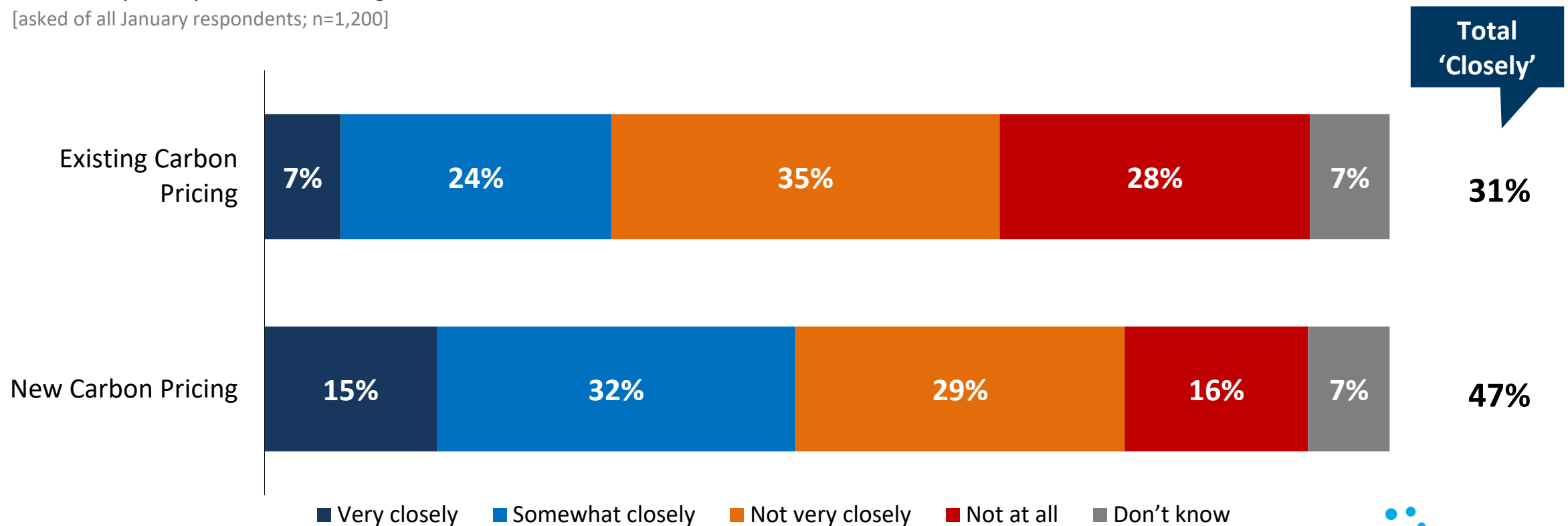
Awareness of Carbon Tax: Respondents in provinces without existing carbon pricing are more likely to be following the news closely

Q

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]

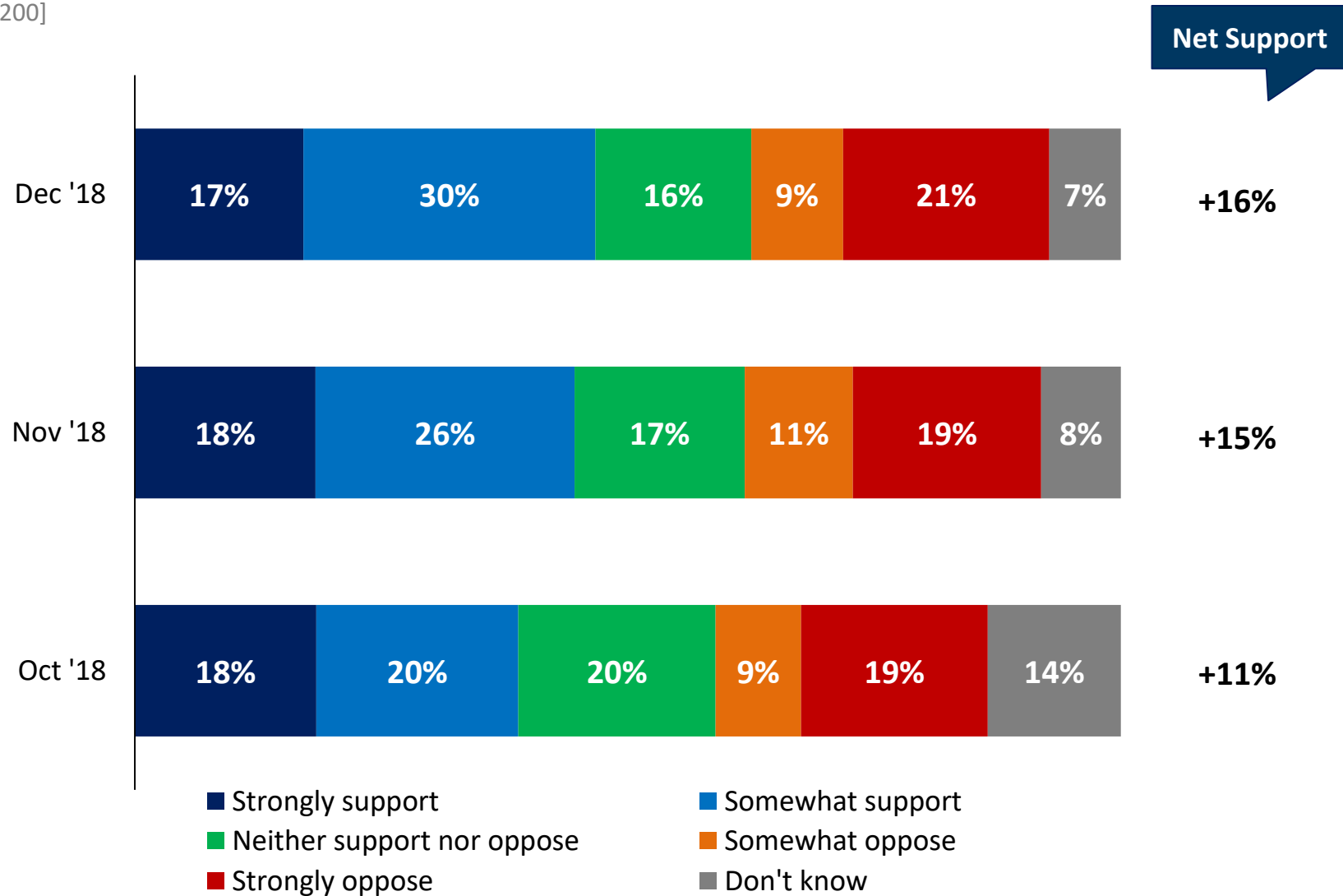


Most Canadians support the concept of the federal carbon price policy



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]



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

46%

42%

42% Agree with Jones

12%

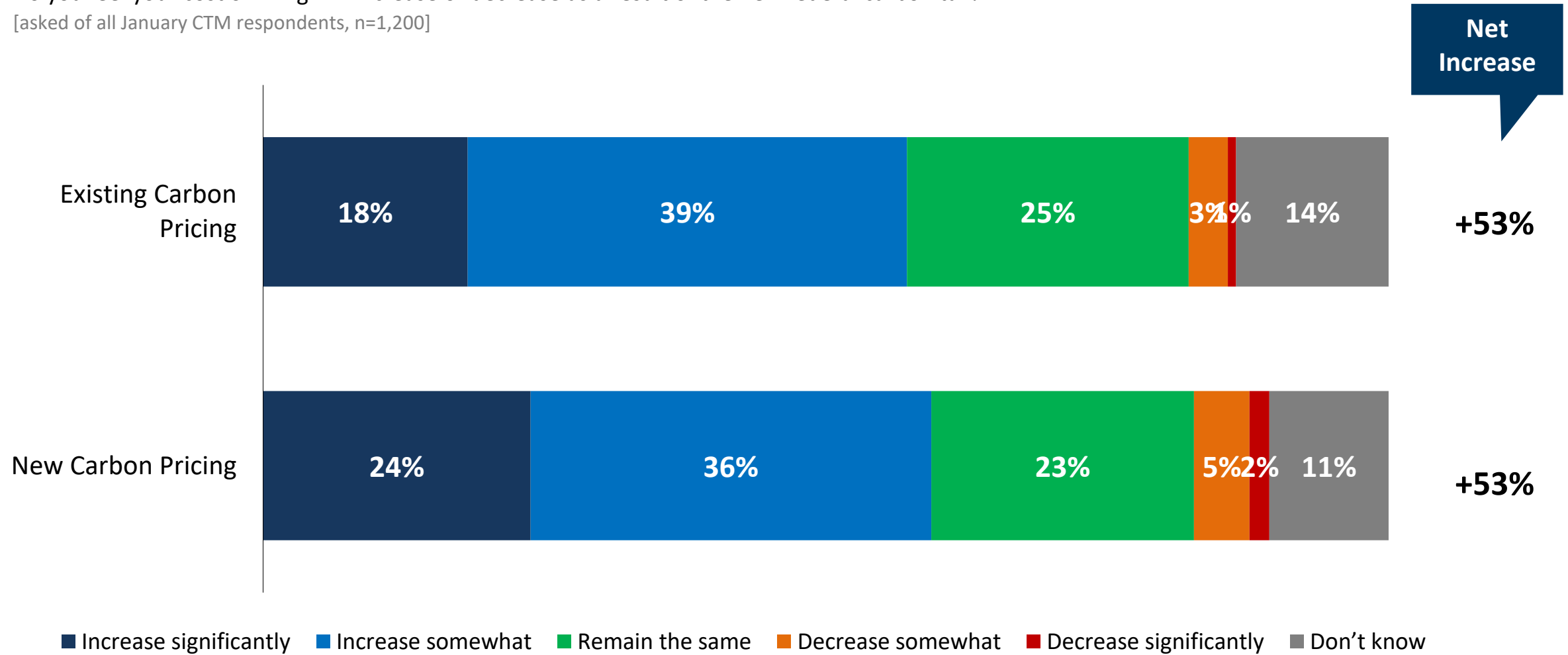
12% Don't know

Expected Impact: Provinces without existing carbon pricing are slightly more likely to expect a significant increase in their cost of living

Q

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]



Note: Net Increase is [Increase significantly] + [Increase somewhat] – [Decrease somewhat] – [Decrease significantly]

Key Takeaways

1.

In Alberta, Kenny and the UCP are firmly in the driver's seat. Notley has at best an outside chance by focusing on leadership.

2.

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

3.

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

4.

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

5.

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.

Survey	Field Dates	Method	National Unweighted N-Size	National Weighted N-Size	Alberta Unweighted N-Size	Alberta Weighted N-Size
<i>November 2018 CTM</i>	November 8 th to 15 th , 2018	Online	2,490	1,200	378	300
<i>December 2018 CTM</i>	December 21 st to January 7 th , 2019	Online	2,700	1,200	592	500
<i>January 2019 CTM</i>	January 16 th to 24 th , 2019	Online	2,451	1,200	348	300

Appendix 2: January 2019 CTM Methodology



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 can not 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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	243	9.9%	165	13.7%
Males 35-54	367	15.0%	201	16.7%
Males 55+	693	28.3%	217	18.1%
Females 18-34	286	11.7%	163	13.6%
Females 35-54	352	14.4%	209	17.4%
Females 55+	510	20.8%	245	20.4%
BC (BC and Yukon)	521	21.3%	163	13.6%
Alberta (Alberta and the Northwest Territories)	348	14.2%	136	11.3%
Prairies (Saskatchewan, Manitoba, and Nunavut)	122	5.0%	80	6.7%
Ontario	751	30.6%	459	38.2%
Quebec	574	23.4%	280	23.3%
Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland)	135	5.5%	82	6.8%

Appendix 3: September 2018 CTM Methodology



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.

Confidence: 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.

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.

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

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 can not 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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	173	6.4%	165	13.8%
Males 35-54	469	17.4%	200	16.7%
Males 55+	803	29.7%	217	18.1%
Females 18-34	213	7.9%	163	13.6%
Females 35-54	427	15.8%	209	17.4%
Females 55+	615	22.8%	245	20.4%
BC (BC and Yukon)	509	18.9%	163	13.6%
Alberta (Alberta and the Northwest Territories)	592	21.9%	136	11.3%
Prairies (Saskatchewan, Manitoba, and Nunavut)	123	4.6%	80	6.7%
Ontario	954	35.3%	459	38.3%
Quebec	394	14.6%	280	23.3%
Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland)	128	4.7%	82	6.8%

Appendix 5: June 2018 Telephone Survey Methodology



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 $\pm 4.0\%$, 19 times out of 20.

Tracking from 2003 is drawn from an October post-election survey of 606 respondents.

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



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