Political Landscape

Canada This Month

July 2019

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RESEARCH GROUP

Methodology

These are the results of three national online surveys conducted in May, June and July and two live caller telephone surveys conducted in Ontario in June and July. Detailed methodology slides for each study are provided at the end of the report.

Weighting: All survey results 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 methodology section.

All three **online surveys** were conducted with eligible Canadians voters conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online 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. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

Online Confidence: These are representative samples. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated.

The two **telephone surveys** were conducted by live callers among approximately 600 randomly-selected Ontario residents who are Canadian citizens, 18 years of age and older. A total of nine sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire province.

Only one respondent per household was eligible to complete each survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.

Telephone Confidence: The margin of error for a random sample of n=600 is approximately +/-4.0%.

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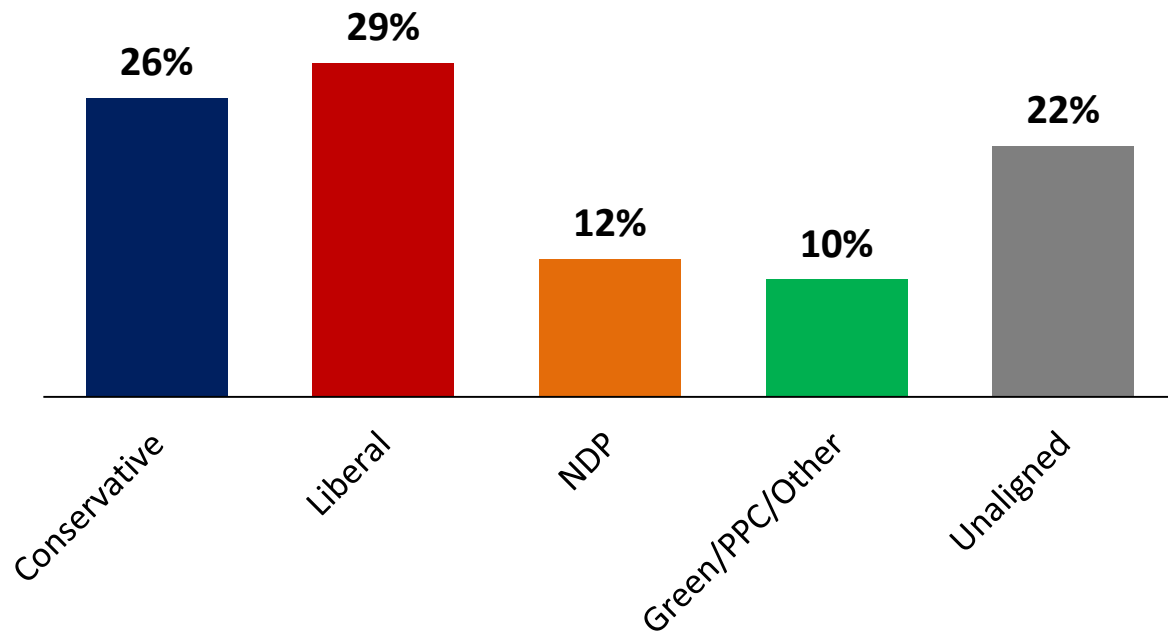RESEARCH GROUP

Party Identification

Federal Party ID: In Quebec, the Liberals have a strong lead on partisanship; outside of Quebec, Liberals only ahead directionally

Q Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents; July 2019]

Rest of Canada

Party	%
Conservative	26%
Liberal	29%
NDP	12%
Green/PPC/Other	10%
Unaligned	22%

n=920

Note: n=1,483 unweighted.

Quebec

Party	%
Conservative	15%
Liberal	27%
NDP	6%
Bloc	14%
Green/PPC/Other	9%
Unaligned	30%

n=280

Note: n=321 unweighted.

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Federal Party ID: Liberals (29%) maintain their lead in partisanship over the CPC (24%); a quarter (24%) are unaligned

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

Federal Vote

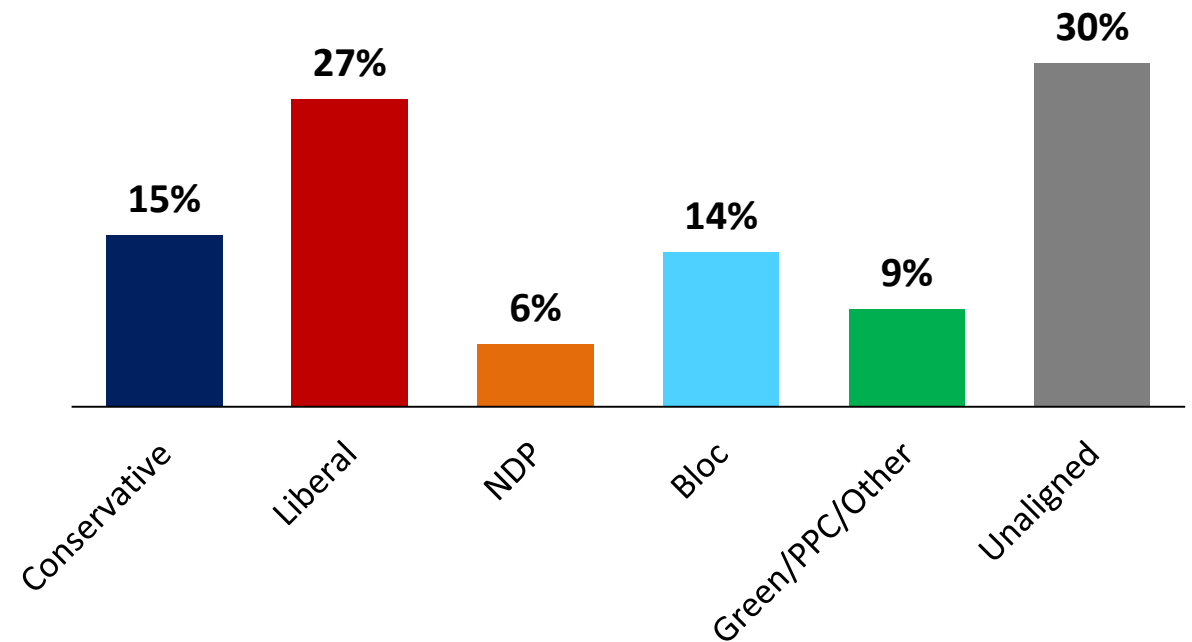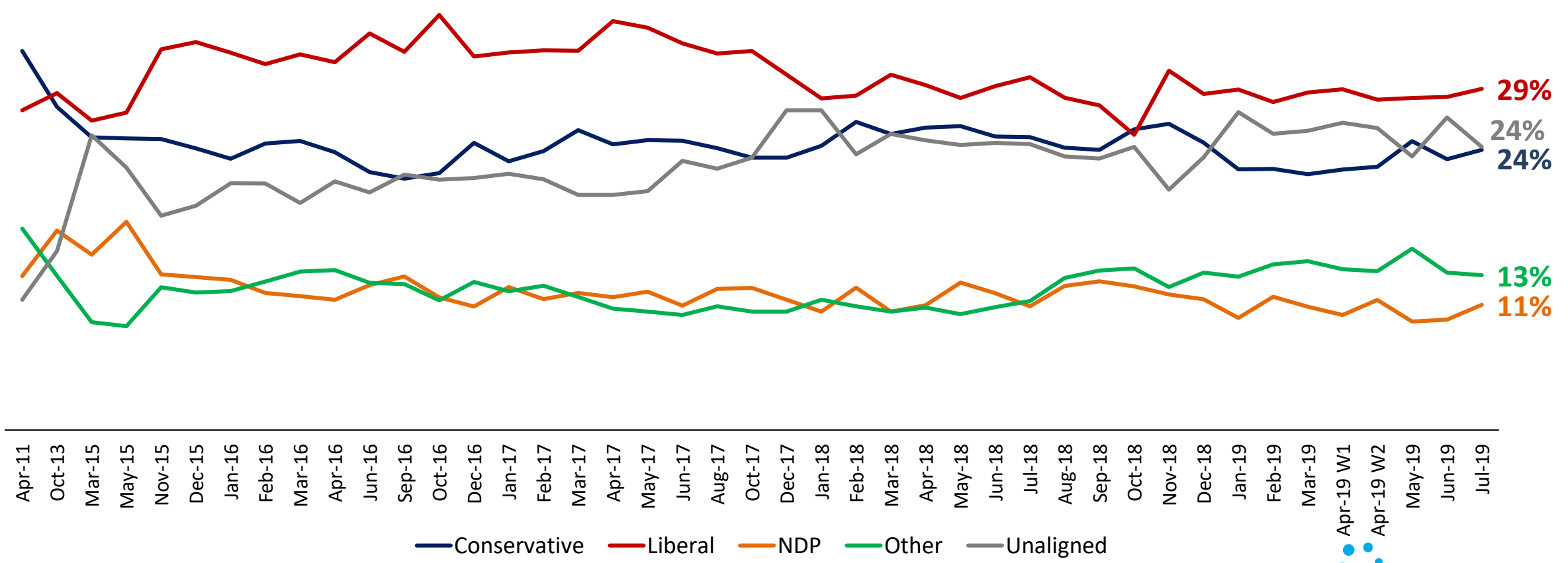# Combined Federal Vote: Liberals (32%) now lead the Conservatives (28%) by 4 points

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

32%
28%
12%
9%
9%
4%
3%
3%

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

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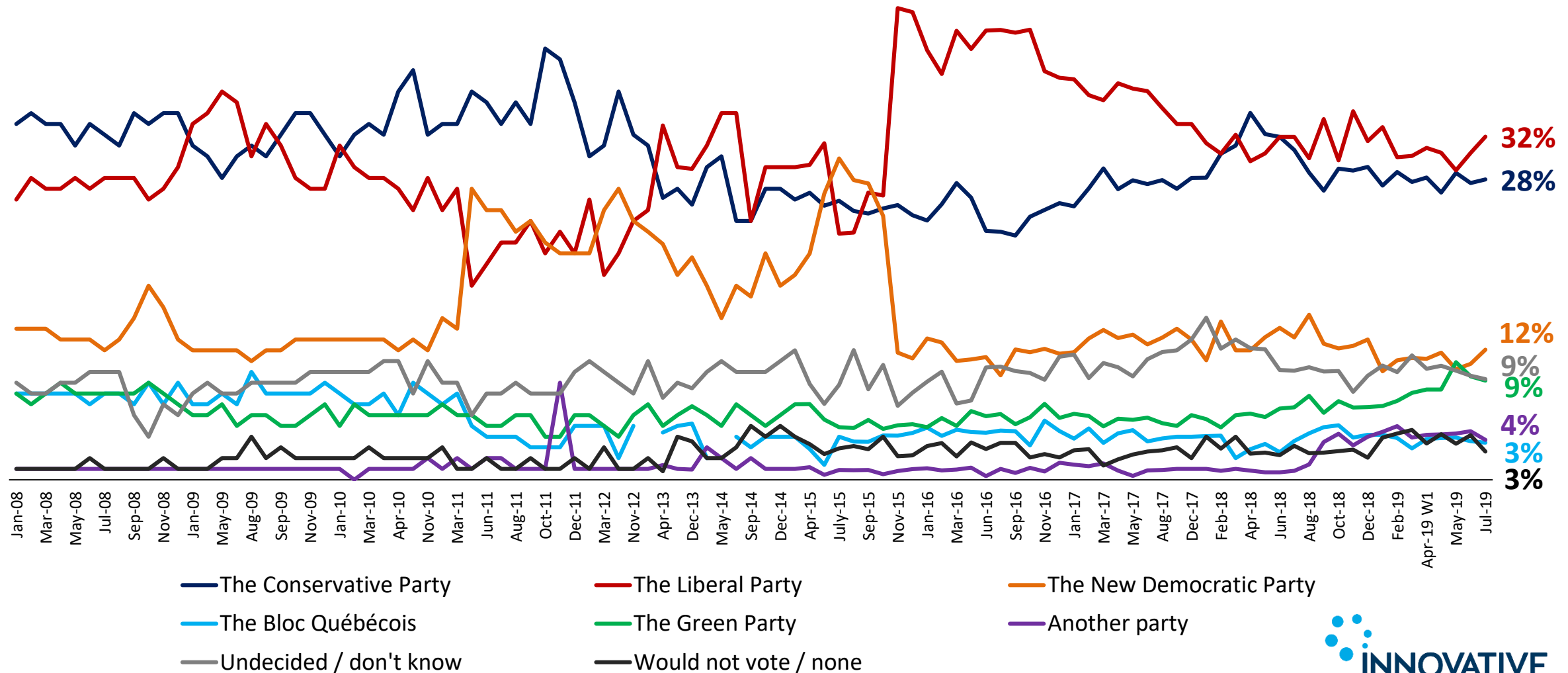
Note: People's Party of Canada has been added since September 2018, included in 'Another party'.

Combined Federal Vote by Region: Liberals lead in Ontario and Quebec; the Conservatives trail more closely in BC and Atlantic

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

Region	Conservative	Liberal	NDP	Bloc	Green	PPC/Other	Undecided DK	Would not vote None
Total	28%	32%	12%	3%	9%	4%	9%	3%
BC	24%	28%	19%		14%	4%	11%	1%
Alberta	47%	23%	10%		3%	6%	7%	2%
Prairies	38%	26%	10%		6%	5%	10%	5%
Ontario	26%	39%	14%		10%	3%	6%	2%
Quebec	20%	27%	7%	15%	9%	4%	14%	4%
Atlantic	28%	33%	10%		9%	3%	13%	5%

Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc ■ Green ■ PPC/Other ■ Undecided DK ■ Would not vote None
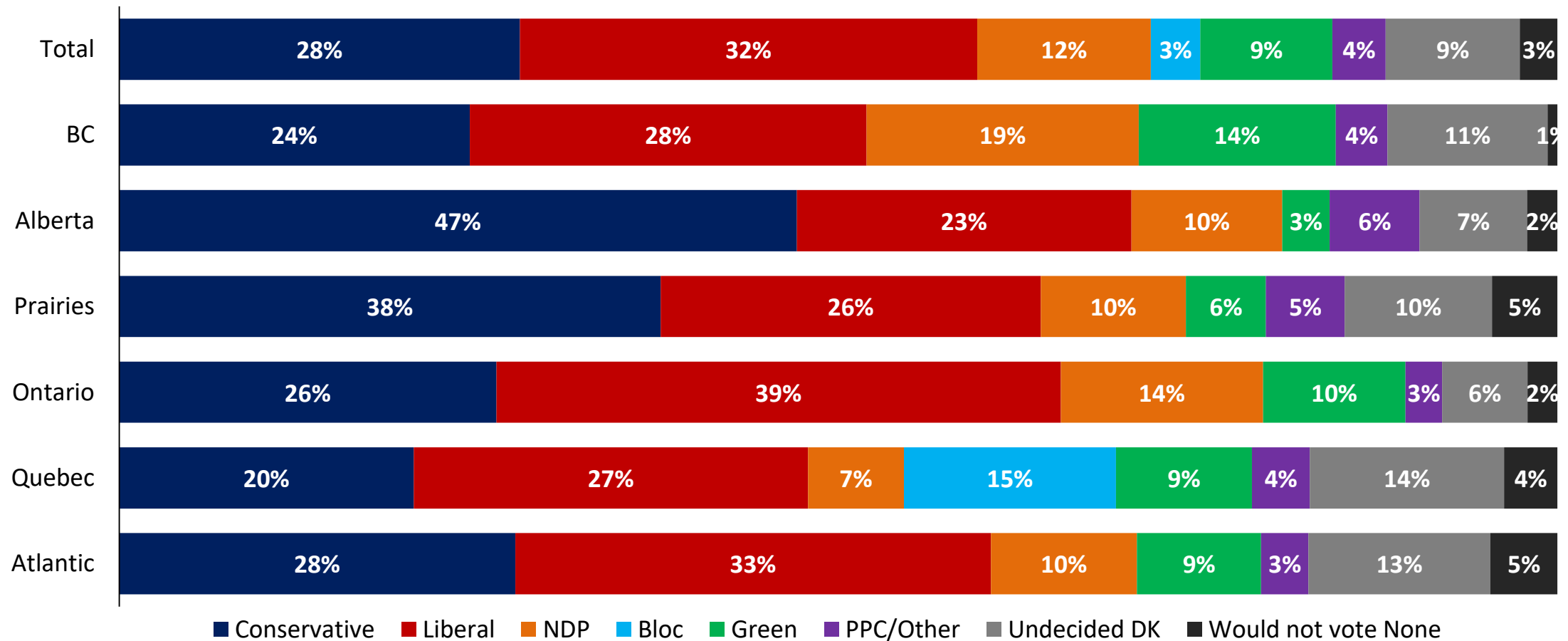
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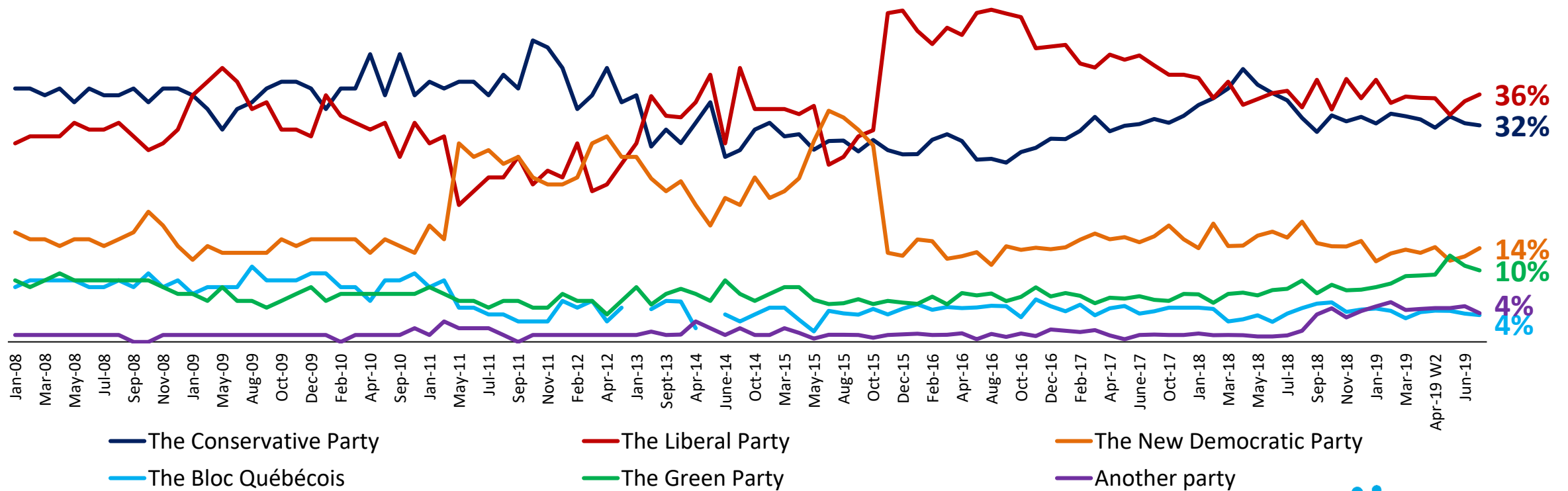# Decided Federal Vote: Liberals up directionally to 36%, now ahead of the Conservatives (32%) by 5 points

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 only decided voters]

36%
32%

14%
10%
4%
4%

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

Note: People's Party of Canada has been added since September 2018, included in 'Another party'.
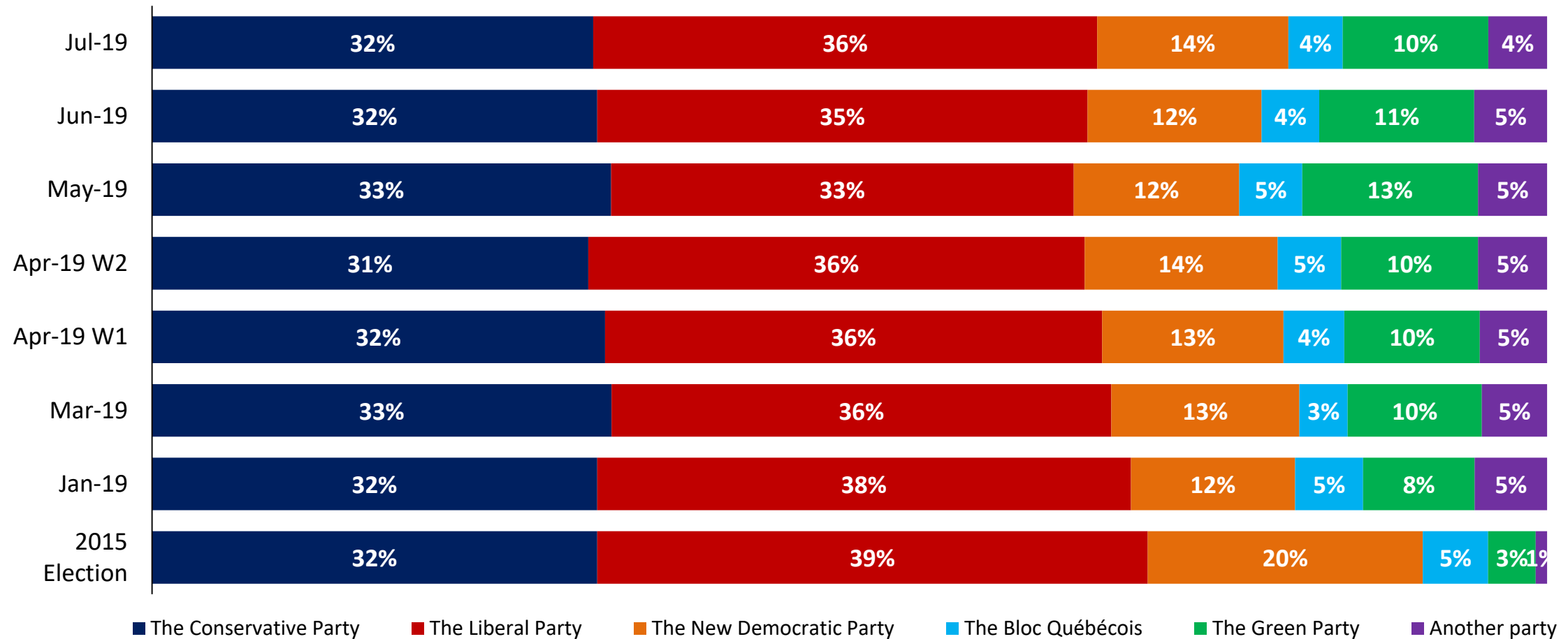
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Decided Federal Vote: The NDP are down 6 points since the 2015 election, while the Liberals and Conservatives remain more steady

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 only decided voters]

	The Conservative Party	The Liberal Party	The New Democratic Party	The Bloc Québécois	The Green Party	Another party
Jul-19	32%	36%	14%	4%	10%	4%
Jun-19	32%	35%	12%	4%	11%	5%
May-19	33%	33%	12%	5%	13%	5%
Apr-19 W2	31%	36%	14%	5%	10%	5%
Apr-19 W1	32%	36%	13%	4%	10%	5%
Mar-19	33%	36%	13%	3%	10%	5%
Jan-19	32%	38%	12%	5%	8%	5%
2015 Election	32%	39%	20%	5%	3%	1%

Note: The "2015 Election" results are obtained from Elections Canada.

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Decided Federal Vote [BC]: The Green Party is up from 8% in 2015 to 16% in July 2019

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]
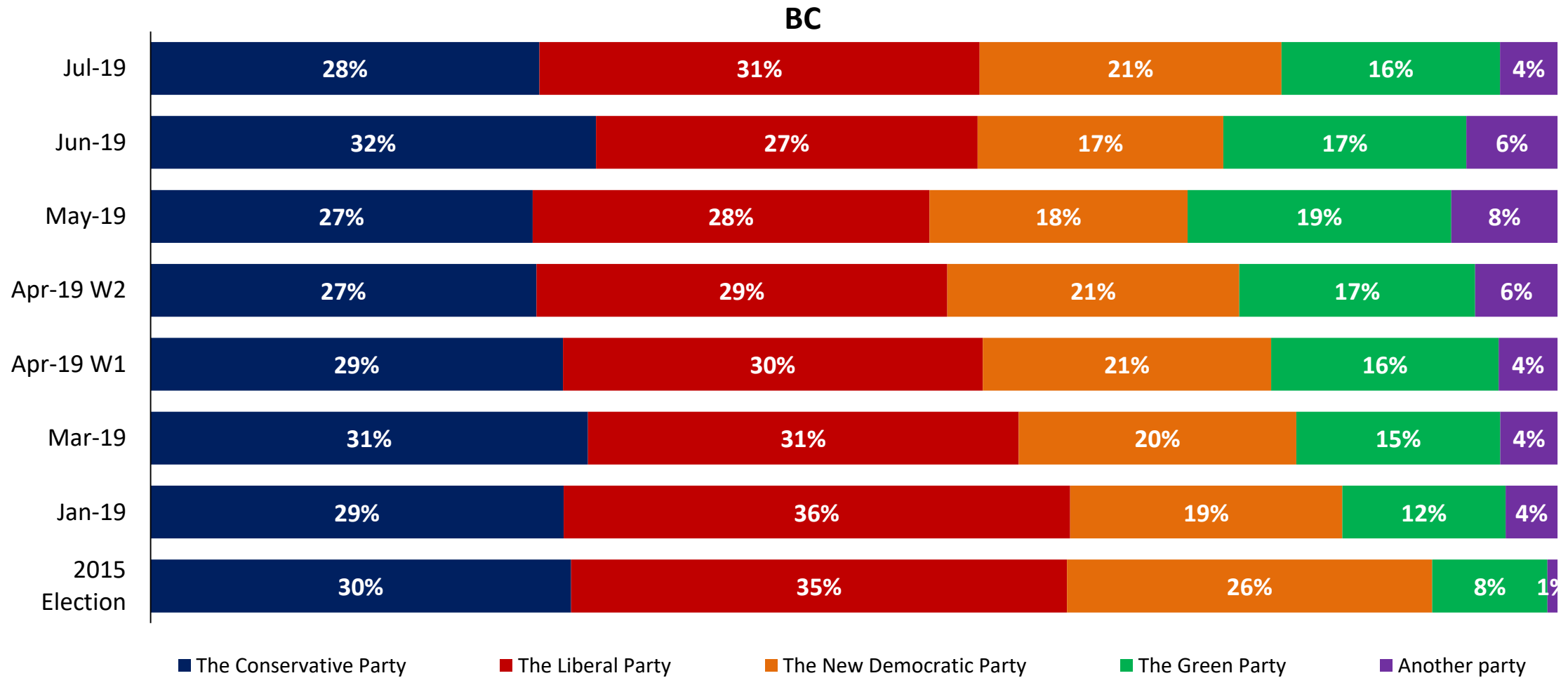[showing only decided voters in BC]

BC

	The Conservative Party	The Liberal Party	The New Democratic Party	The Green Party	Another party
Jul-19	28%	31%	21%	16%	4%
Jun-19	32%	27%	17%	17%	6%
May-19	27%	28%	18%	19%	8%
Apr-19 W2	27%	29%	21%	17%	6%
Apr-19 W1	29%	30%	21%	16%	4%
Mar-19	31%	31%	20%	15%	4%
Jan-19	29%	36%	19%	12%	4%
2015 Election	30%	35%	26%	8%	1%

■ The Conservative Party   ■ The Liberal Party   ■ The New Democratic Party   ■ The Green Party   ■ Another party

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Note: The "2015 Election" results are obtained from Elections Canada.

Decided Federal Vote [Alberta]: The Conservatives drop in Alberta since the 2015 election but remain ahead of the Liberals by 26 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]
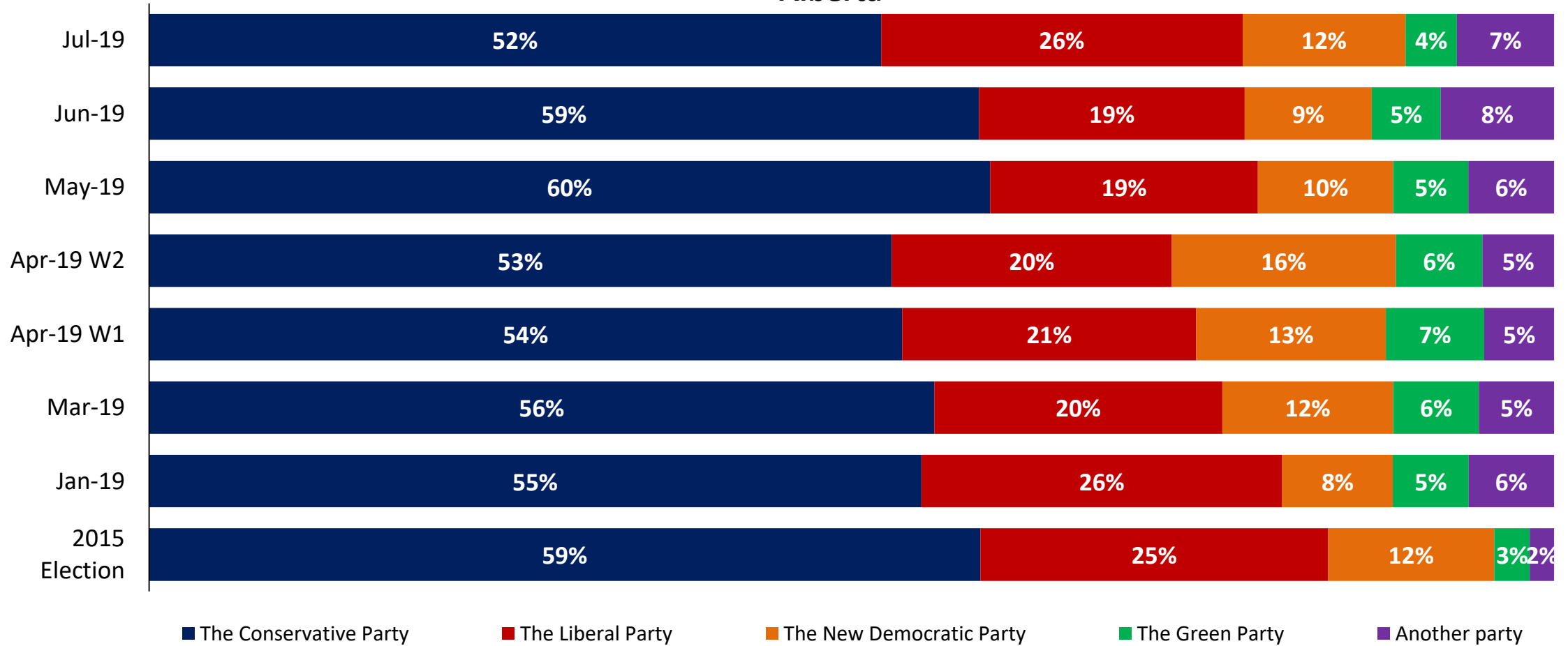[showing only decided voters in Alberta]

Alberta

	The Conservative Party	The Liberal Party	The New Democratic Party	The Green Party	Another party
Jul-19	52%	26%	12%	4%	7%
Jun-19	59%	19%	9%	5%	8%
May-19	60%	19%	10%	5%	6%
Apr-19 W2	53%	20%	16%	6%	5%
Apr-19 W1	54%	21%	13%	7%	5%
Mar-19	56%	20%	12%	6%	5%
Jan-19	55%	26%	8%	5%	6%
2015 Election	59%	25%	12%	3%	2%

Note: The "2015 Election" results are obtained from Elections Canada.
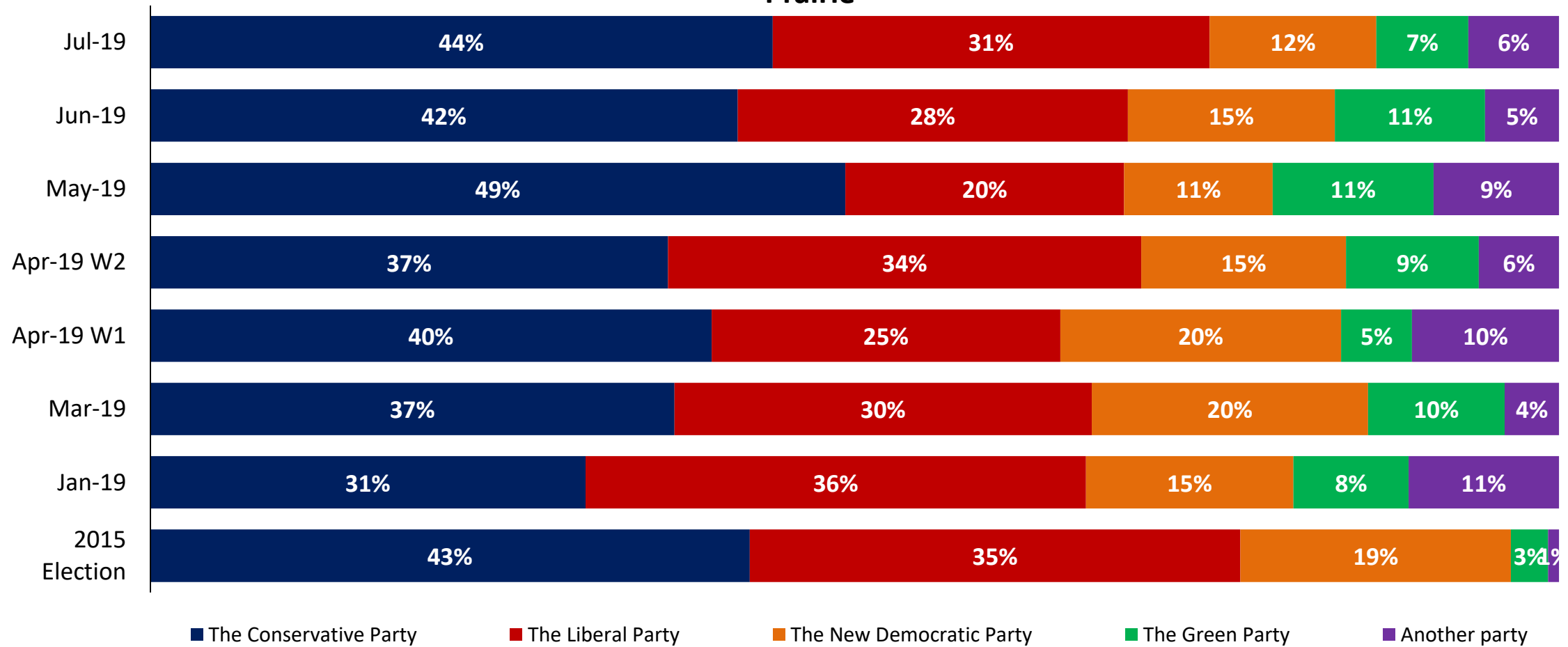
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Decided Federal Vote [Prairie]: The NDP are down 7 points since the 2015 election while the Conservatives have maintained their lead

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 only decided voters in the Prairies]

Prairie

	The Conservative Party	The Liberal Party	The New Democratic Party	The Green Party	Another party
Jul-19	44%	31%	12%	7%	6%
Jun-19	42%	28%	15%	11%	5%
May-19	49%	20%	11%	11%	9%
Apr-19 W2	37%	34%	15%	9%	6%
Apr-19 W1	40%	25%	20%	5%	10%
Mar-19	37%	30%	20%	10%	4%
Jan-19	31%	36%	15%	8%	11%
2015 Election	43%	35%	19%	3%	1%

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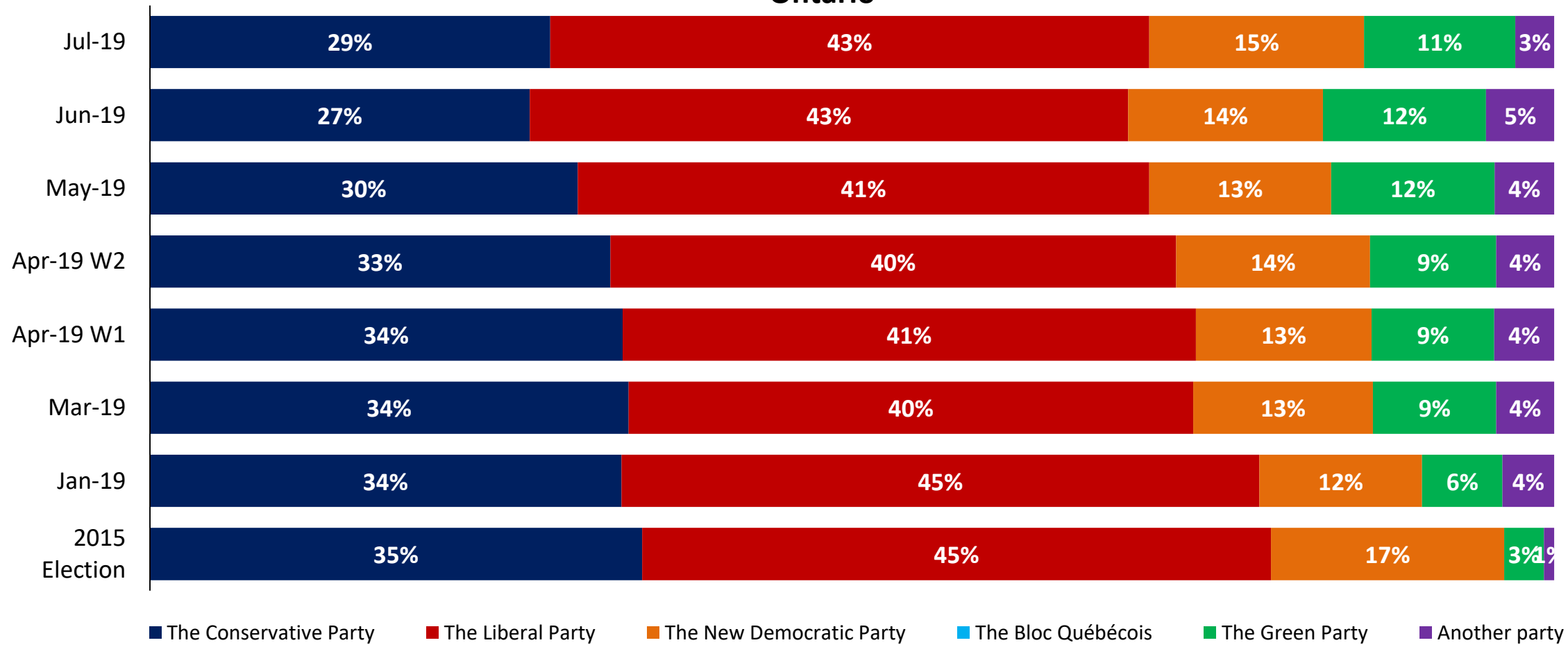**Note**: The "2015 Election" results are obtained from Elections Canada.

Decided Federal Vote [Ontario]: The Liberals hold a strong lead in Ontario, 14 points ahead of the Conservatives

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]
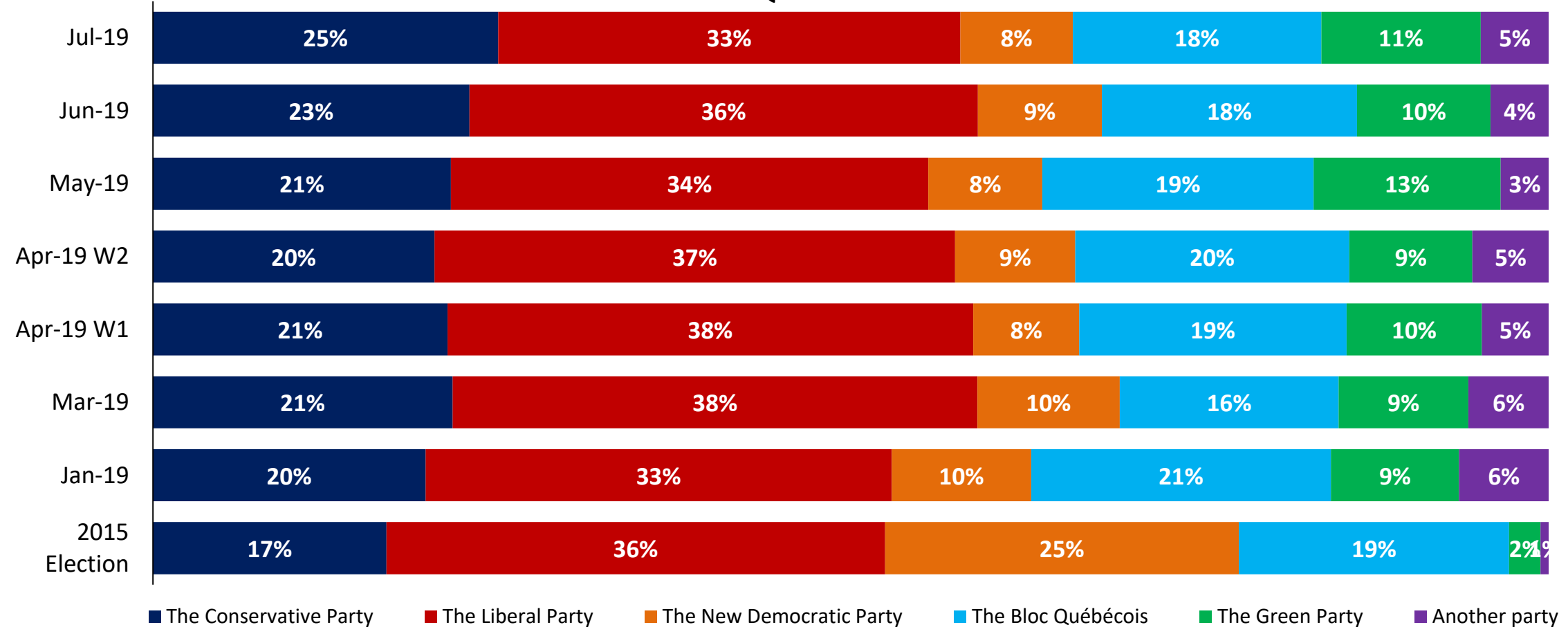[showing only decided voters in Ontario]

Ontario

	The Conservative Party	The Liberal Party	The New Democratic Party	The Green Party	Another party
Jul-19	29%	43%	15%	11%	3%
Jun-19	27%	43%	14%	12%	5%
May-19	30%	41%	13%	12%	4%
Apr-19 W2	33%	40%	14%	9%	4%
Apr-19 W1	34%	41%	13%	9%	4%
Mar-19	34%	40%	13%	9%	4%
Jan-19	34%	45%	12%	6%	4%
2015 Election	35%	45%	17%	3%	1%

Legend: ■ The Conservative Party ■ The Liberal Party ■ The New Democratic Party ■ The Bloc Québécois ■ The Green Party ■ Another party

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Note: The "2015 Election" results are obtained from Elections Canada.

Decided Federal Vote [Quebec]: The gap between the Liberals and Conservatives is down to 8 points; the NDP now trails the Green 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? [DECIDED VOTE]
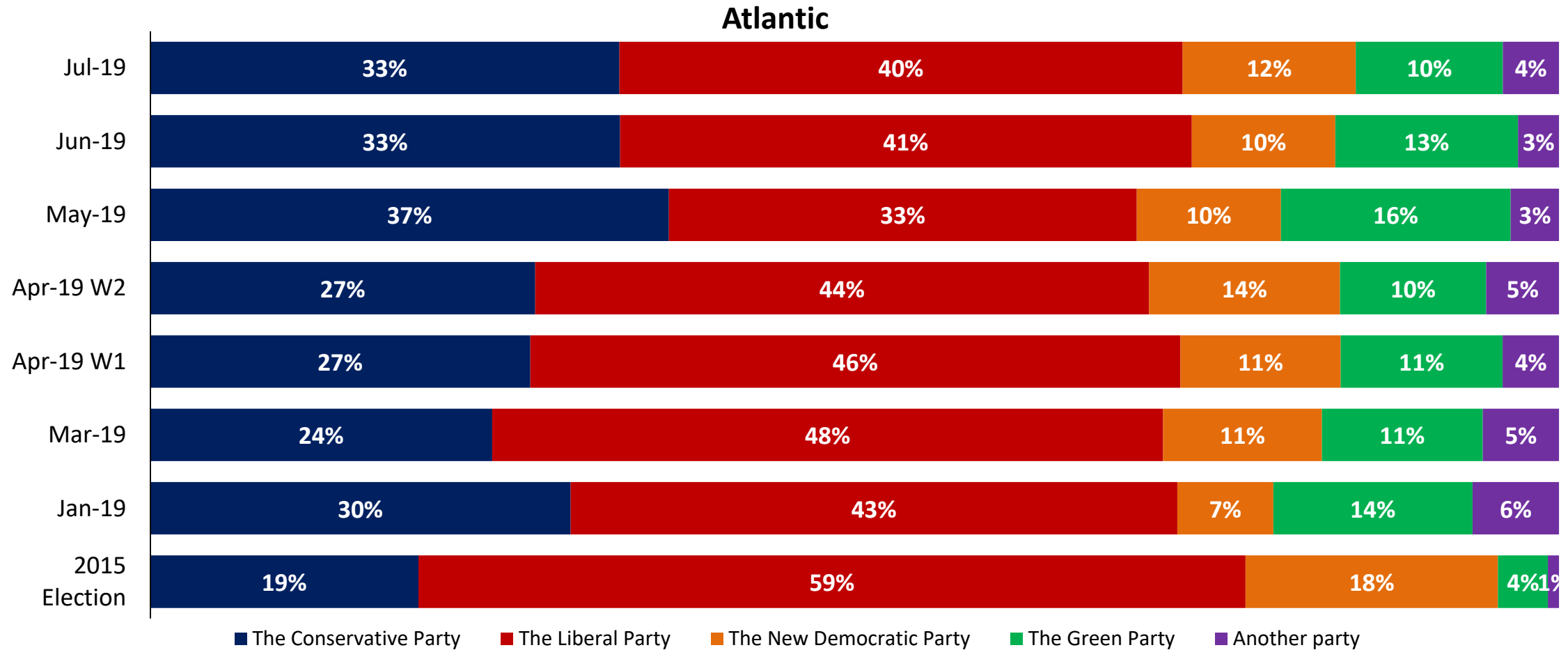[showing only decided voters in Quebec]

Quebec

	The Conservative Party	The Liberal Party	The New Democratic Party	The Bloc Québécois	The Green Party	Another party
Jul-19	25%	33%	8%	18%	11%	5%
Jun-19	23%	36%	9%	18%	10%	4%
May-19	21%	34%	8%	19%	13%	3%
Apr-19 W2	20%	37%	9%	20%	9%	5%
Apr-19 W1	21%	38%	8%	19%	10%	5%
Mar-19	21%	38%	10%	16%	9%	6%
Jan-19	20%	33%	10%	21%	9%	6%
2015 Election	17%	36%	25%	19%	2%	1%

Note: The "2015 Election" results are obtained from Elections Canada.

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Decided Federal Vote [Atlantic]: Decided vote in Atlantic Canada is steady since June; the Liberals are down significantly since 2015

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 only decided voters in Atlantic Canada]

Atlantic

	The Conservative Party	The Liberal Party	The New Democratic Party	The Green Party	Another party
Jul-19	33%	40%	12%	10%	4%
Jun-19	33%	41%	10%	13%	3%
May-19	37%	33%	10%	16%	3%
Apr-19 W2	27%	44%	14%	10%	5%
Apr-19 W1	27%	46%	11%	11%	4%
Mar-19	24%	48%	11%	11%	5%
Jan-19	30%	43%	7%	14%	6%
2015 Election	19%	59%	18%	4%	1%

■ The Conservative Party   ■ The Liberal Party   ■ The New Democratic Party   ■ The Green Party   ■ Another party

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Note: The "2015 Election" results are obtained from Elections Canada.

Federal Decided Vote [Ontario]: The telephone survey shows a closer race than online polling, but the Liberals lead in all polls

Innovative Research Group Inc. (**INNOVATIVE**) recently conducted a series of surveys asking Ontarians about federal politics:

- An online panel survey of 670 Ontarians (weighted to n=600 using Census data from Statistics Canada) conducted from May 27th to 30th, 2019.
- A live-caller, mixed cell/landline RDD telephone survey of 611 Ontarians (weighted to n=600 using Census data from Statistics Canada) conducted from June 18th to 26th, 2019.
- An online panel survey of 820 Ontarians (weighted to n=600 using Census data from Statistics Canada) conducted from June 28th to July 8th, 2019.
- A live-caller, mixed cell/landline RDD telephone survey of 610 Ontarians (weighted to n=600 using Census data from Statistics Canada) conducted from July 18th to 29th, 2019.
- An online panel survey of 695 Ontarians (weighted to n=600 using Census data from Statistics Canada) conducted from July 26th to July 31st, 2019.

In all polls, the Liberals lead with between 37% and 43%, while the Conservatives trail with between 34% and 27%.

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly?
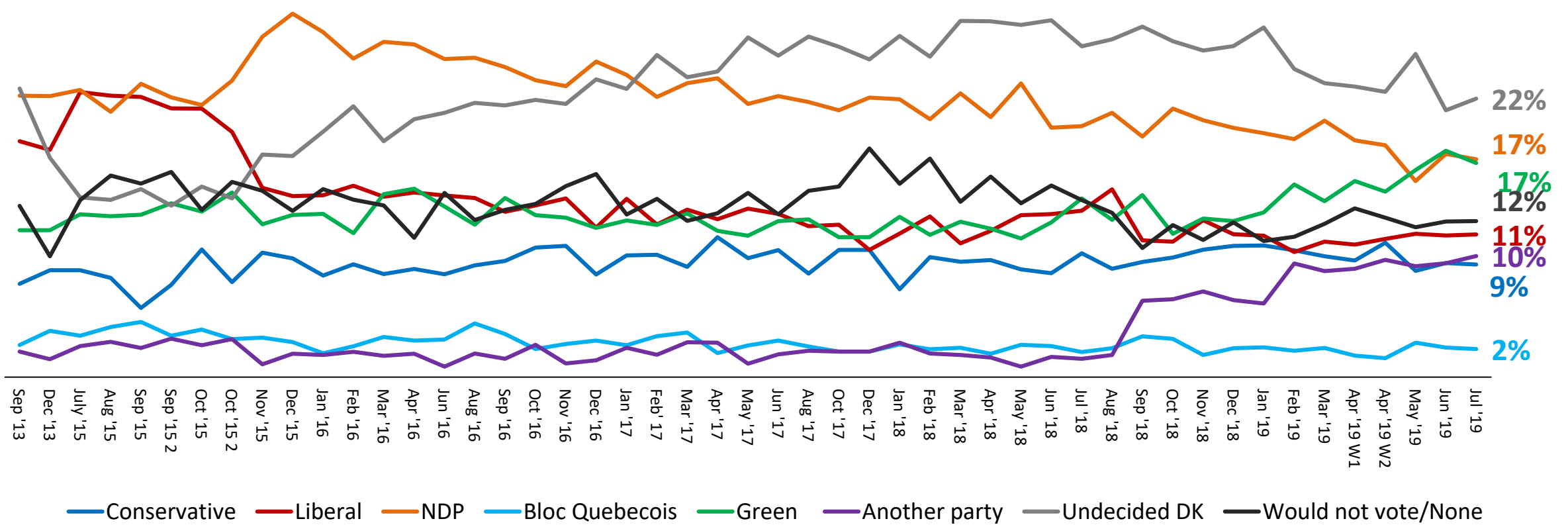
[Decided] [showing decided voters in Ontario only]

	May 27th to 30th Online Poll	June 18th to 26th Telephone Poll	June 28th to July 8th Online Poll	July 18th to 29th Telephone Poll	July 26th to July 31st Online Poll
CONSERVATIVE	30%	34%	27%	33%	29%
Liberal	41%	37%	43%	38%	43%
NDP	13%	17%	14%	11%	15%
green PARTY OF CANADA	12%	8%	12%	11%	11%
Other	4%	4%	5%	6%	3%

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Second Choice: Green and NDP are tied at 17% as the top 2nd choice, followed by the Liberals at 11% and the Conservatives at 9%

Q And which party would be your second choice?
[asked only of respondents who had a first choice, n=1,057]

22%
17%
17%
12%
11%
10%
9%
2%

Conservative — Liberal — NDP — Bloc Quebecois — Green — Another party — Undecided DK — Would not vote/None

Note: People's Party of Canada has been added in September 2018, included in 'Another party'.

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2nd Choice by 1st Choice: CPC most like to gain from Bloc and Other voters, Liberals from NDP and Greens

Q And which party would be your second choice? **BY** Combined Vote
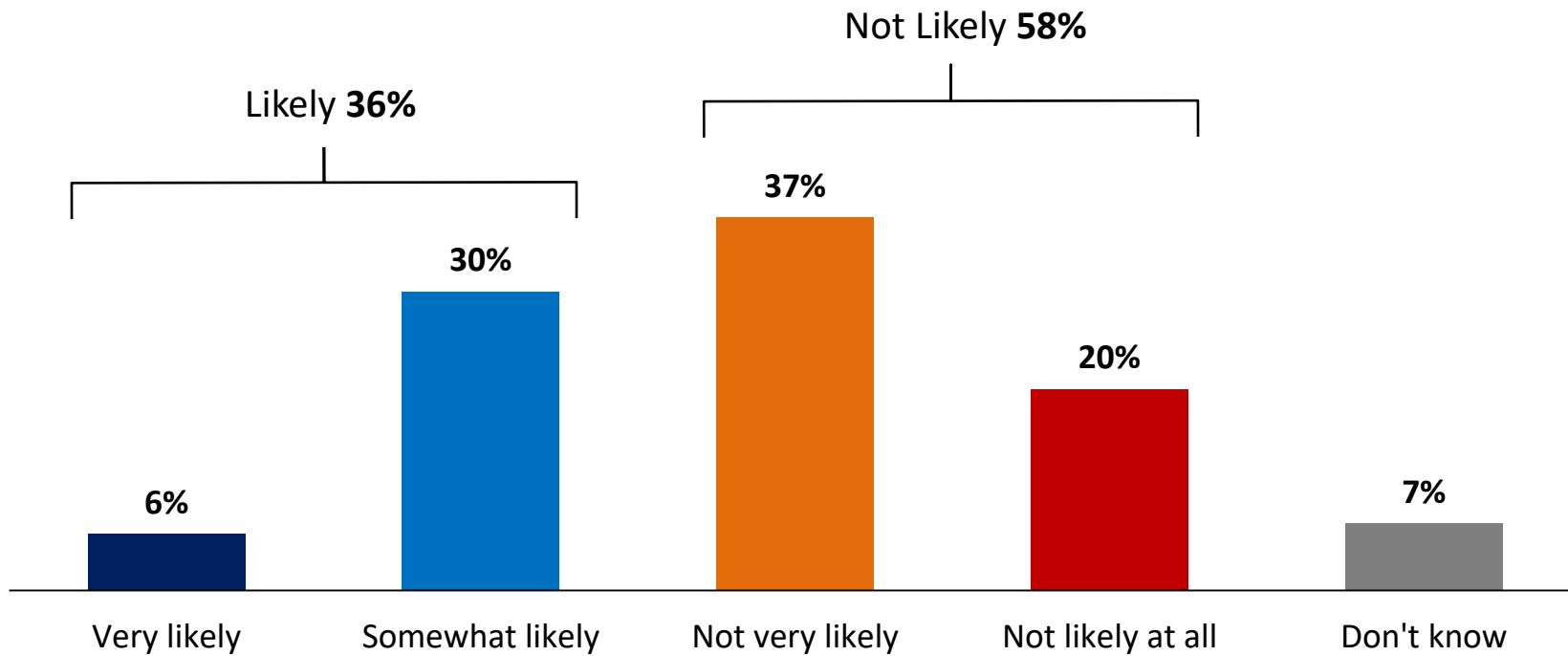[asked of all respondents]

Combined Vote

2nd Choice	Conservative	Liberal	NDP	Bloc [QC Only]	Green	Other
Conservative	N/A	11%	11%	29%	7%	35%
Liberal	13%	N/A	29%	3%	26%	11%
NDP	11%	28%	N/A	16%	24%	7%
Bloc	2%	1%	3%	N/A	4%	6%
Green	12%	23%	25%	22%	N/A	13%
People's Party	16%	6%	2%	0%	10%	3%
Other	0%	1%	0%	0%	2%	5%
Undecided/ Don't know	25%	21%	19%	15%	25%	14%
Would not vote/Nobody	20%	9%	11%	15%	3%	6%

Likelihood to Change to 2nd Choice: One-in-three (34%) voters say they are at least somewhat likely to vote for their 2nd choice

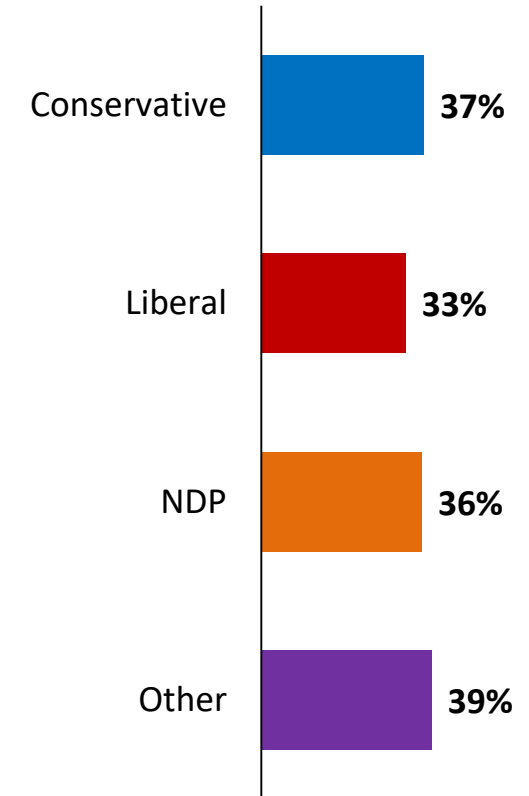**Q** How likely is it you may change your mind and vote for your second choice?
[asked only of respondents who had a second choice, n=695]

Likely **36%**

Not Likely **58%**

- Very likely: 6%
- Somewhat likely: 30%
- Not very likely: 37%
- Not likely at all: 20%
- Don't know: 7%

Sample Breakdown
Those who say "likely"

- Conservative: 37%
- Liberal: 33%
- NDP: 36%
- Other: 39%

Note: In sidebar results, "Other" refers to Green, Bloc Quebecois, People's Party and other parties.

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Firmness of Vote by Party: Bloc voters are the least likely to change their vote; Green and Other voters are most likely

Q How likely is it you may change your mind and vote for your second choice? **BY** Combined Vote
[asked of all respondents]

Combined Vote

Likelihood to Switch	Conservative	Liberal	NDP	Bloc [QC Only]	Green	Other
Very likely	5%	5%	8%	4%	5%	12%
Somewhat likely	32%	28%	29%	25%	36%	31%
Not very likely	34%	38%	41%	39%	39%	32%
Not at all likely	23%	23%	17%	28%	12%	8%
Don`t know	6%	6%	5%	3%	9%	18%
TOTAL LIKELY	**37%**	**33%**	**36%**	**29%**	**41%**	**42%**
TOTAL NOT LIKELY	**57%**	**61%**	**58%**	**68%**	**50%**	**39%**

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Methodology

July Online Methodology

These are the results of the July 2019 Canada This Month survey conducted between July 26th and July 31st, 2019.

This online survey of 1,804 adult Canadians was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, 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 Lucid constituent panels 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. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	194	10.8%	165	13.8%
Males 35-54	243	13.5%	201	16.7%
Males 55+	533	29.5%	217	18.1%
Females 18-34	200	11.1%	163	13.6%
Females 35-54	259	14.4%	208	17.4%
Females 55+	375	20.8%	245	20.4%
BC	336	18.6%	163	13.6%
Alberta	243	13.5%	136	11.3%
Prairies	108	6.0%	80	6.7%
Ontario	695	38.5%	459	38.3%
Quebec	321	17.8%	280	23.3%
Atlantic	101	5.6%	82	6.8%

June Online Methodology

Results of the June 2019 Canada This Month survey conducted between June 28th and July 8th, 2019 are also presented in this report.

This online survey of 2,515 adult Canadians was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, 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 Lucid constituent panels 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.

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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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	208	8.3%	165	13.8%
Males 35-54	327	13.0%	201	16.7%
Males 55+	806	32.0%	217	18.1%
Females 18-34	240	9.5%	163	13.6%
Females 35-54	343	13.6%	208	17.4%
Females 55+	591	23.5%	245	20.4%
BC	415	16.5%	163	13.6%
Alberta	275	10.9%	136	11.3%
Prairies	129	5.1%	80	6.7%
Ontario	820	32.6%	459	38.3%
Quebec	737	29.3%	280	23.3%
Atlantic	139	5.5%	82	6.8%

May Online Methodology

Results of the May 2019 Canada This Month survey conducted between May 27th and May 30th, 2019 are also presented in this report.

This online survey of 1,691 adult Canadians was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, 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 Lucid constituent panels 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. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	163	9.6%	165	13.8%
Males 35-54	211	12.5%	201	16.7%
Males 55+	548	32.4%	217	18.1%
Females 18-34	173	10.2%	163	13.6%
Females 35-54	243	14.4%	208	17.4%
Females 55+	353	20.9%	245	20.4%
BC	300	17.7%	163	13.6%
Alberta	216	12.8%	136	11.3%
Prairies	88	5.2%	80	6.7%
Ontario	670	39.6%	459	38.3%
Quebec	320	18.9%	280	23.3%
Atlantic	97	5.7%	82	6.8%

July Telephone Methodology

Ontario decided vote results are compared to July 2019 Ontario This Month conducted between July 18, 2019 and July 29, 2019.

This survey was conducted by telephone among 610 randomly-selected Ontario residents who are Canadian citizens, 18 years of age and older. A total of nine sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire province.

Only one respondent per household was eligible to complete this survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.

Confidence: The margin of error for a random sample of n=600 is approximately +/-4.0%.

Weighting: The sample has been weighted (n=600) by age, gender and region using the latest available Census data to reflect the actual demographic composition of the population.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	69	11.3%	83	13.8%
Males 35-54	104	17%	100	16.6%
Males 55+	121	19.8%	107	17.7%
Females 18-34	56	9.2%	83	13.8%
Females 35-54	114	18.7%	107	17.8%
Females 55+	146	23.9%	122	20.3%
Toronto	130	21.3%	125	20.9%
GTA	129	21.1%	156	26.0%
South/West	154	25.2%	156	26.0%
North/East	197	32.3%	163	27.1%

June Telephone Methodology

Ontario decided vote results are compared to June 2019 Ontario This Month conducted between June 18, 2019 and June 26, 2019.

This survey was conducted by telephone among 611 randomly-selected Ontario residents who are Canadian citizens, 18 years of age and older. A total of nine sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire province.

Only one respondent per household was eligible to complete this survey. The final sample includes both landline and cell phone respondents, so that individuals who don't have a landline are represented.

This survey is compared with previous studies since October 2015. In each survey, approximately 600 adults are surveyed. For tracking data, results are always weighted based on the most recent available Census data.

Confidence: The margin of error for a random sample of n=600 is approximately +/- 4.0%.

Weighting: The sample has been weighted (n=600) by age, gender and region using the latest available Census data to reflect the actual demographic composition of the population.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	78	12.8%	83	13.8%
Males 35-54	93	15.2%	100	16.6%
Males 55+	123	20.1%	106	17.7%
Females 18-34	57	9.3%	83	13.8%
Females 35-54	122	20%	107	17.8%
Females 55+	138	22.6%	122	20.3%
Toronto	164	26.8%	125	20.9%
GTA	168	27.5%	156	26%
South/West	124	20.3%	155	25.8%
North/East	155	25.4%	164	27.3%

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For more information, please contact:

Greg Lyle
President
(t) 416-642-6340
(e) glyle@innovativeresearch.ca