# 2019 Election:
# Ad Testing Tracking Deck

October 2019

# Key Findings

- At the national level, the vote has been pretty flat since the start of September. So far, there have only been one or two-point movements for any party. The Liberals continue to lead the Conservatives, but Liberal vote tends to come from younger voters. The vote among those who actually turnout may well be closer.

- We oversampled Quebec to understand the dynamic of the race there given the TVA debate. We start with an unweighted sample of 978 and then the national weights pull the sample down to 537. Both the Liberals and Bloc are up 3 points since the beginning of the campaign with the CPC down 3.

- This survey ran from Thursday to Monday and asked about the TVA debate. Trudeau is most likely to be seen as the winner outside Quebec while Blanchet was most likely to be seen as the winner within Quebec. Blanchet and Singh both tend to be seen as beating expectations. Trudeau held his own while Scheer lost ground, particularly in Quebec.

- Singh has been growing slowly but surely on leadership attributes but remains clearly behind the front runners on all attributes. Trudeau and Scheer have been flat since the campaign began. In Quebec, Blanchet has seen some gains since the debate, but still trails behind Trudeau.

# Methodology

**These are the full results of an online survey conducted between October 3rd and October 7th, 2019. Partial results of the same survey were published earlier.**

This online survey of 2,835 adult Canadians was conducted using Dynata, a leading provider of online samples. The results are weighted to n=2,300 based on Census data from Statistics Canada.

Respondents from the Dynata 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. 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.

**Tracking:** Tracking results are shown from two earlier surveys. Wave 1 was conducted between August 30th and September 6th (weighted n=2,500). Wave 2 was conducted between September 17th and 25th (weighted n=2,300). Results from the most recent study are presented as Wave 3.

| | Unweighted (n) | Unweighted (%) | Weighted (n) | Weighted (%) |
|---|---|---|---|---|
| **Males 18-34** | 230 | 8.1% | 316 | 13.8% |
| **Males 35-54** | 478 | 16.9% | 384 | 16.7% |
| **Males 55+** | 546 | 19.3% | 416 | 18.1% |
| **Females 18-34** | 397 | 14.0% | 313 | 13.6% |
| **Females 35-54** | 533 | 18.8% | 399 | 17.4% |
| **Females 55+** | 645 | 22.8% | 469 | 20.4% |
| | | | | |
| **BC** | 343 | 12.1% | 315 | 13.7% |
| **Alberta** | 285 | 10.1% | 261 | 11.4% |
| **Prairies** | 180 | 6.3% | 153 | 6.7% |
| **Ontario** | 861 | 30.4% | 878 | 38.2% |
| **Quebec** | 978 | 34.5% | 537 | 23.4% |
| **Atlantic** | 188 | 6.6% | 156 | 6.8% |

# Methodology

- Results in this report are drawn from a set of ad testing surveys. These surveys have been conducted using Dynata, a different online panel provider from INNOVATIVE's regular tracking studies. Additionally, this survey uses a different measure of vote choice from the standard INNOVATIVE approach.  The question wording is presented below:

  - "If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party."

- Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters.

- Past research by INNOVATIVE has shown that this question is largely equivalent to a more standard approach, by asking both the standard question wording and this new question wording in the same survey and comparing results.

- This question wording provides a more nuanced breakdown of vote that is useful when testing the impact of ads, without losing the overall vote intention results.

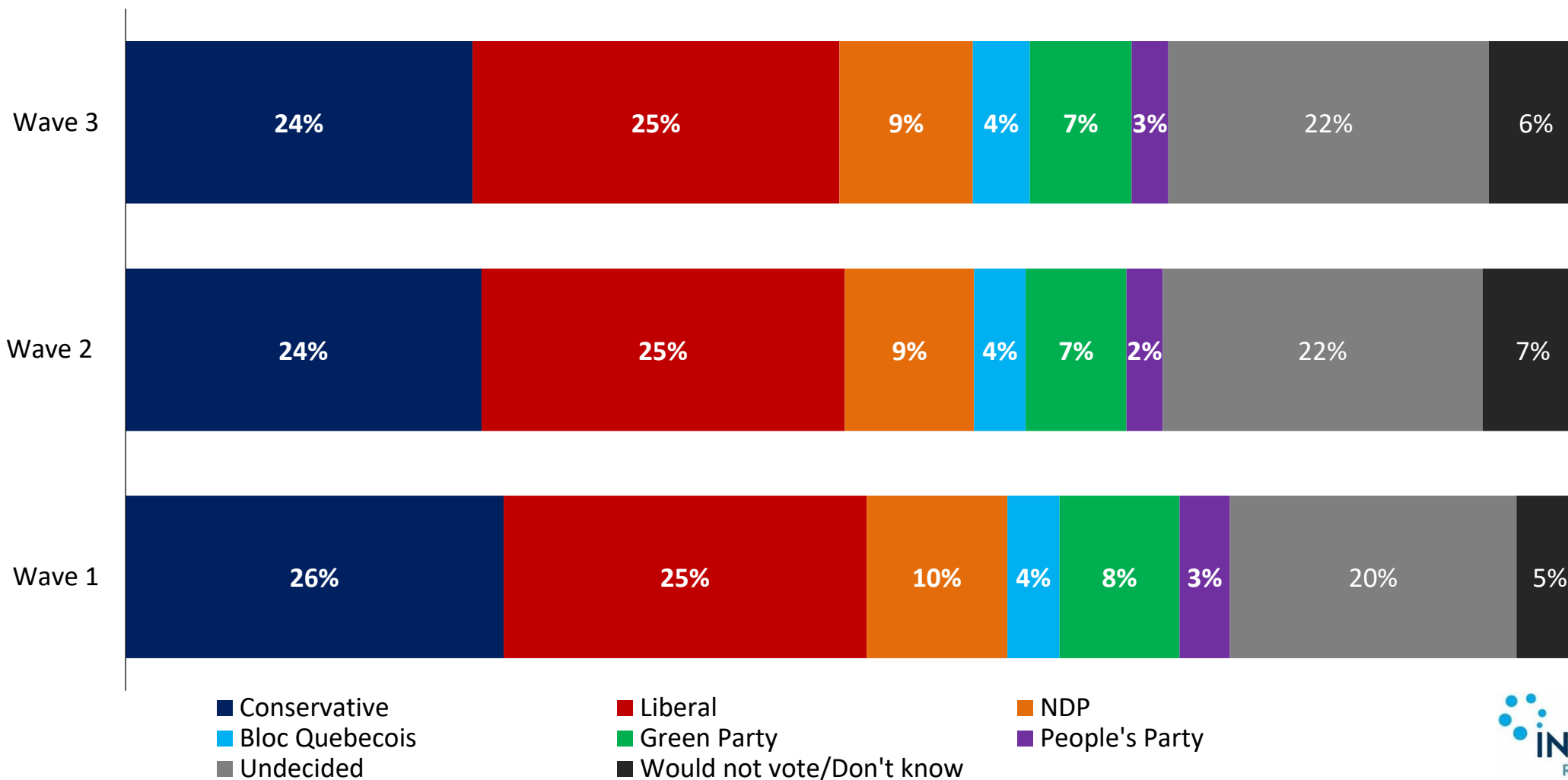INNOVATIVE
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# Federal Vote

# Combined Vote by Wave: The Liberals (25%) lead the Conservatives (24%) directionally; 22% are undecided

**Q** If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.

[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters.]

| Wave | Conservative | Liberal | NDP | Bloc Quebecois | Green Party | People's Party | Undecided | Would not vote/Don't know |
|------|------|------|------|------|------|------|------|------|
| Wave 3 | 24% | 25% | 9% | 4% | 7% | 3% | 22% | 6% |
| Wave 2 | 24% | 25% | 9% | 4% | 7% | 2% | 22% | 7% |
| Wave 1 | 26% | 25% | 10% | 4% | 8% | 3% | 20% | 5% |

Legend:
- ■ Conservative
- ■ Liberal
- ■ NDP
- ■ Bloc Quebecois
- ■ Green Party
- ■ People's Party
- ■ Undecided
- ■ Would not vote/Don't know

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# Decided Vote by Wave: The Liberals (35%) lead the Conservatives (33%) directionally; the NDP trail distantly at 13%

Q If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.

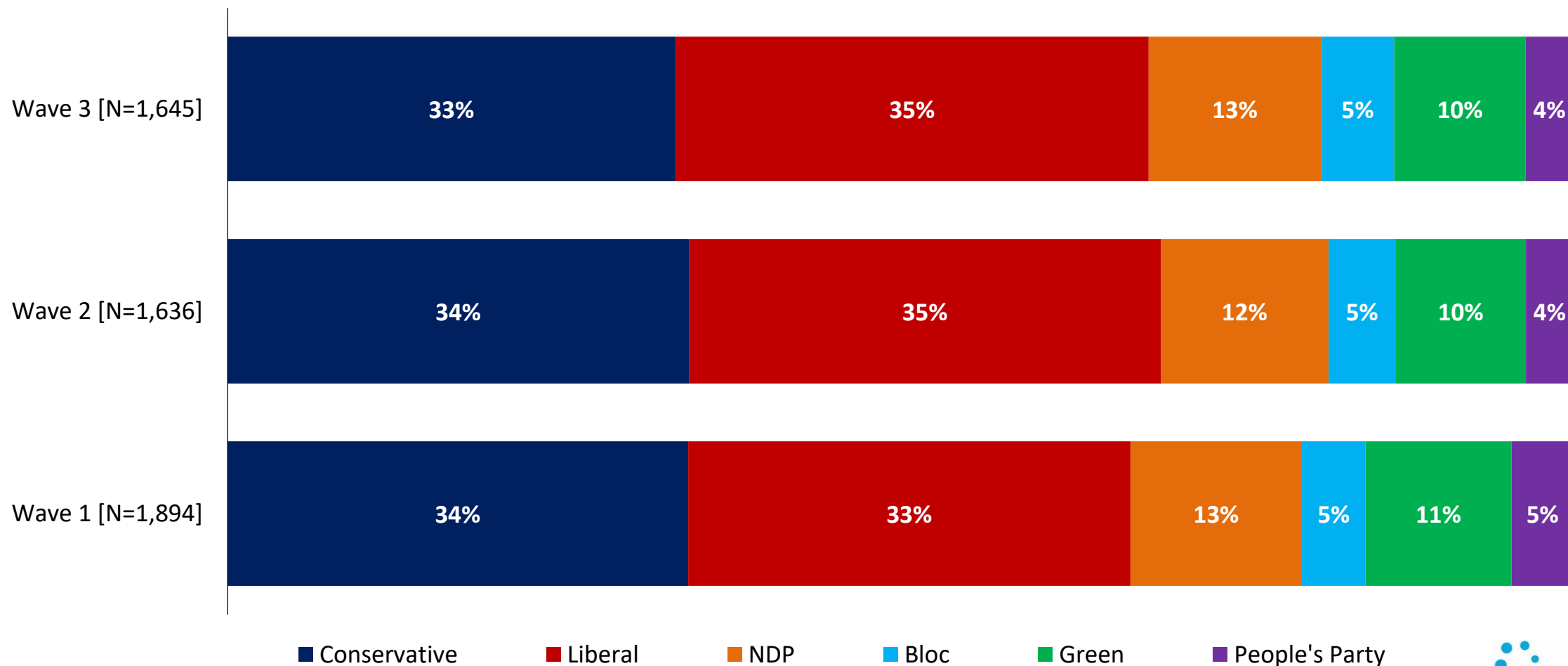[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]

| | Conservative | Liberal | NDP | Bloc | Green | People's Party |
|---|---|---|---|---|---|---|
| Wave 3 [N=1,645] | 33% | 35% | 13% | 5% | 10% | 4% |
| Wave 2 [N=1,636] | 34% | 35% | 12% | 5% | 10% | 4% |
| Wave 1 [N=1,894] | 34% | 33% | 13% | 5% | 11% | 5% |

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# Decided Vote by Region: The Liberals lead in Ontario, Quebec, Atlantic Canada, and BC; the CPC lead in Alberta and the Prairies

**Q** If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.

[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]
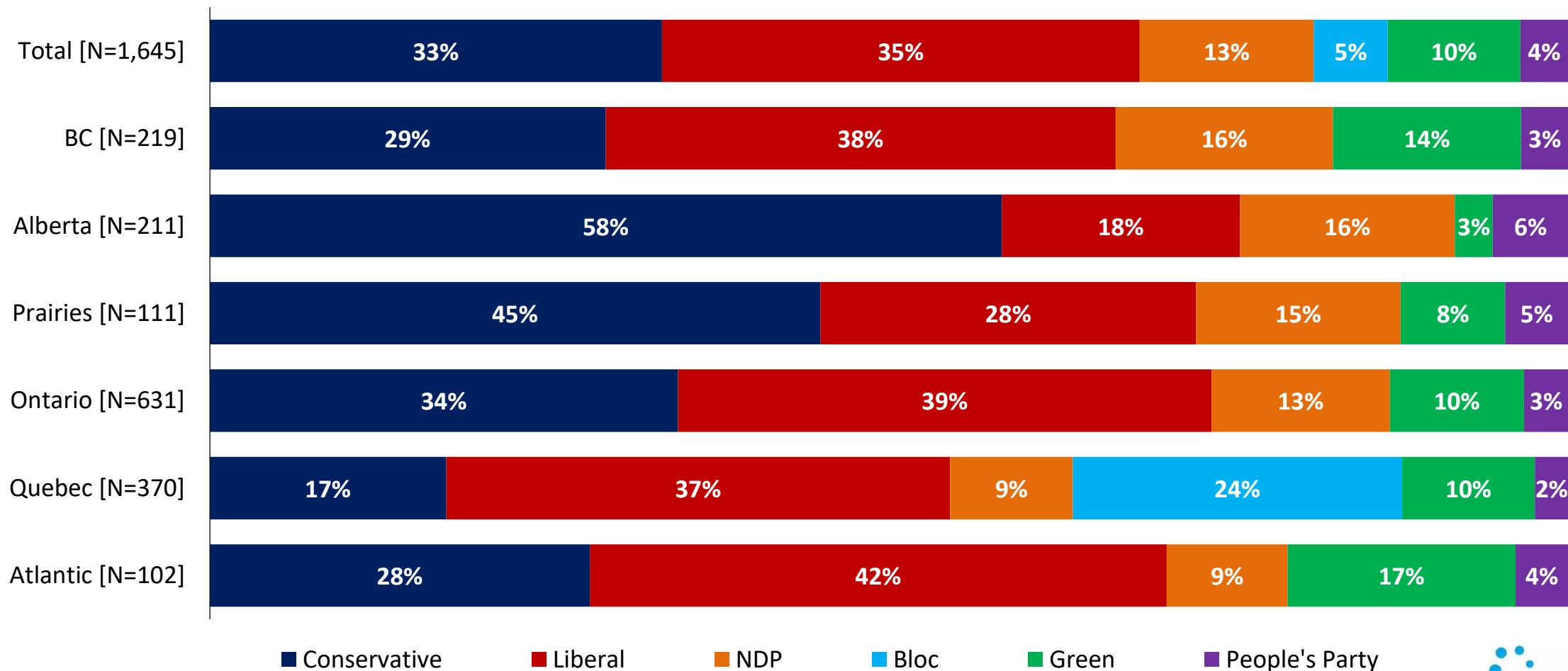
| Region | Conservative | Liberal | NDP | Bloc | Green | People's Party |
|---|---|---|---|---|---|---|
| Total [N=1,645] | 33% | 35% | 13% | 5% | 10% | 4% |
| BC [N=219] | 29% | 38% | 16% | | 14% | 3% |
| Alberta [N=211] | 58% | 18% | 16% | | 3% | 6% |
| Prairies [N=111] | 45% | 28% | 15% | | 8% | 5% |
| Ontario [N=631] | 34% | 39% | 13% | | 10% | 3% |
| Quebec [N=370] | 17% | 37% | 9% | 24% | 10% | 2% |
| Atlantic [N=102] | 28% | 42% | 9% | | 17% | 4% |

Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc ■ Green ■ People's Party

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# Decided Vote by Age and Gender: Among men, the Liberals and Conservatives are tied; among women the Liberals are ahead

**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 choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]
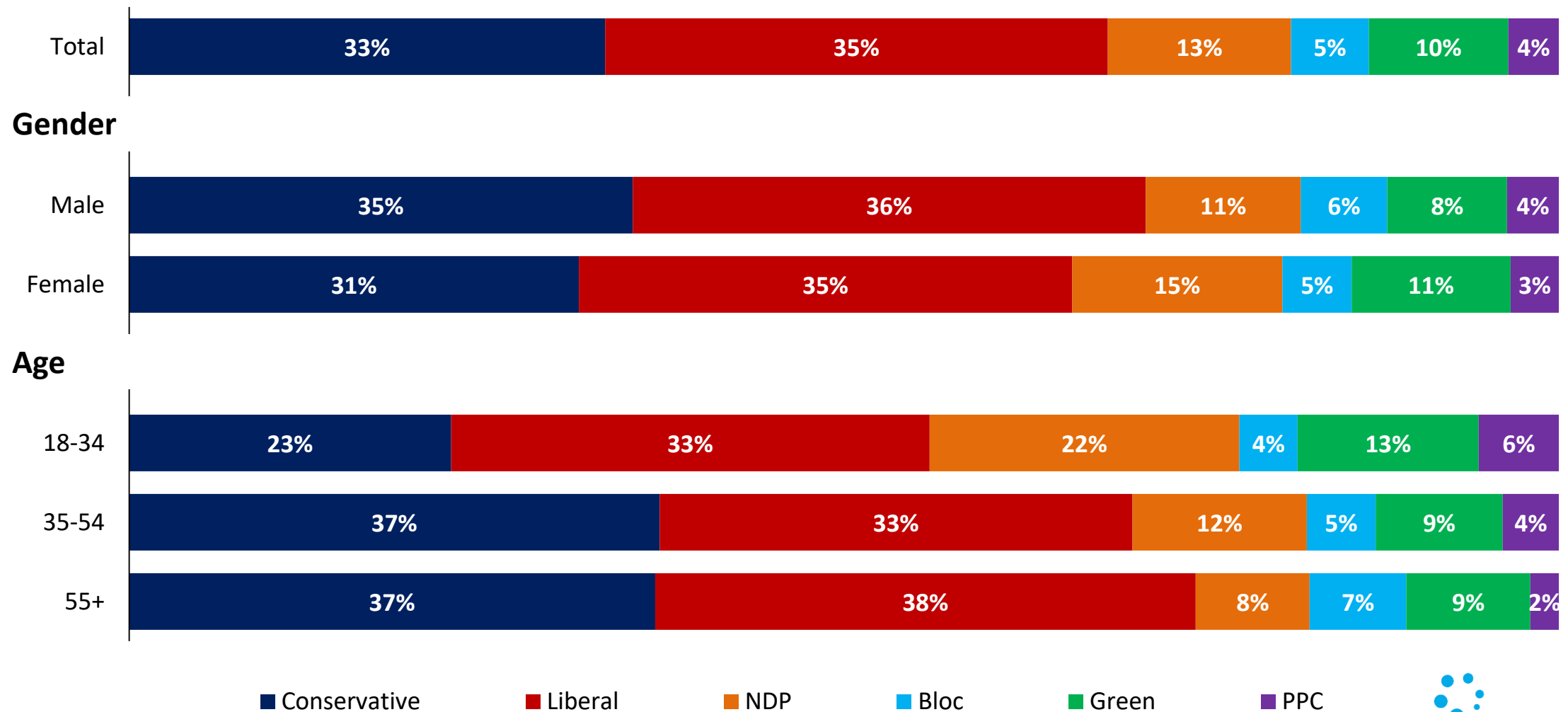
| | Conservative | Liberal | NDP | Bloc | Green | PPC |
|---|---|---|---|---|---|---|
| **Total** | 33% | 35% | 13% | 5% | 10% | 4% |

**Gender**

| | Conservative | Liberal | NDP | Bloc | Green | PPC |
|---|---|---|---|---|---|---|
| **Male** | 35% | 36% | 11% | 6% | 8% | 4% |
| **Female** | 31% | 35% | 15% | 5% | 11% | 3% |

**Age**

| | Conservative | Liberal | NDP | Bloc | Green | PPC |
|---|---|---|---|---|---|---|
| **18-34** | 23% | 33% | 22% | 4% | 13% | 6% |
| **35-54** | 37% | 33% | 12% | 5% | 9% | 4% |
| **55+** | 37% | 38% | 8% | 7% | 9% | 2% |

■ Conservative   ■ Liberal   ■ NDP   ■ Bloc   ■ Green   ■ PPC

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# Quebec Decided Vote by Wave: In Quebec, the Liberals lead by double digits while the Bloc are in second at 24%

**Q** If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.

[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]
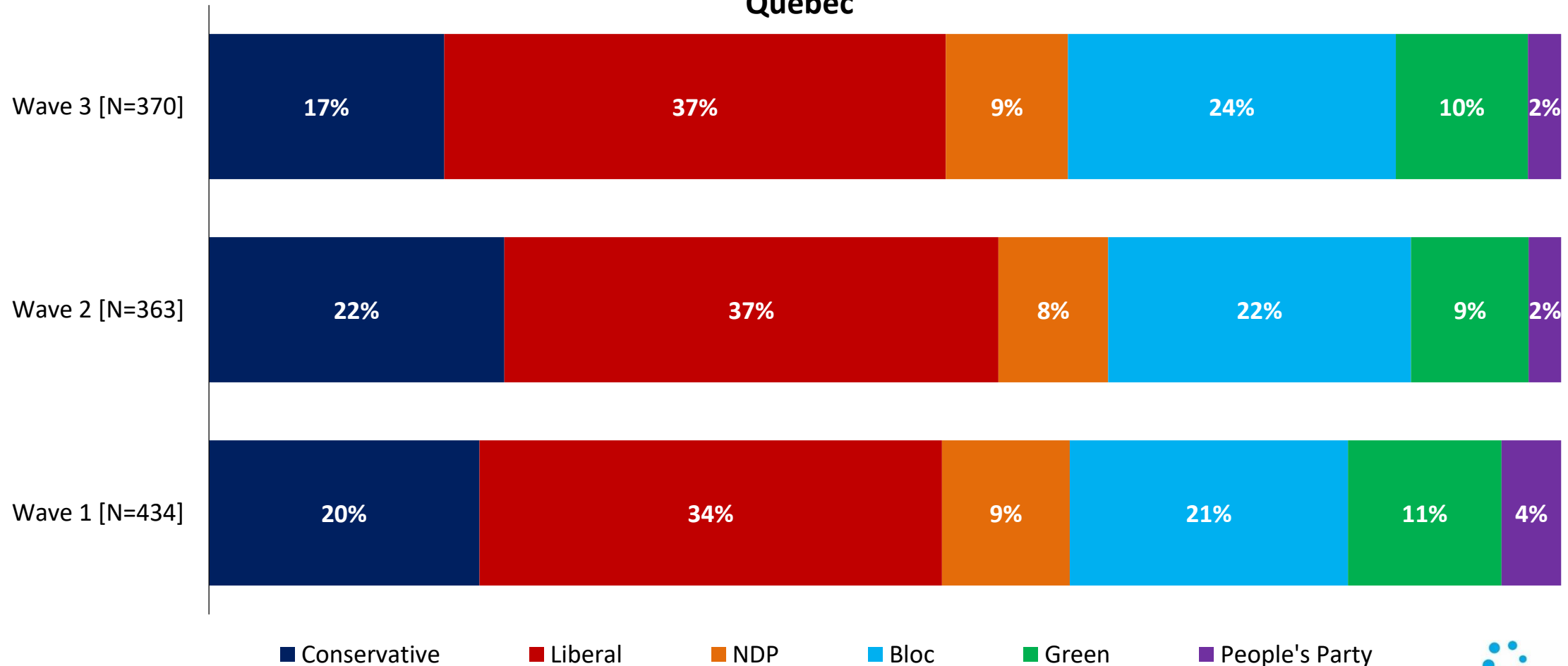
### Quebec

| Wave | Conservative | Liberal | NDP | Bloc | Green | People's Party |
|------|------|------|------|------|------|------|
| Wave 3 [N=370] | 17% | 37% | 9% | 24% | 10% | 2% |
| Wave 2 [N=363] | 22% | 37% | 8% | 22% | 9% | 2% |
| Wave 1 [N=434] | 20% | 34% | 9% | 21% | 11% | 4% |

■ Conservative   ■ Liberal   ■ NDP   ■ Bloc   ■ Green   ■ People's Party

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# Rest of Canada Decided Vote by Wave: The Conservatives (38%) hold a narrow lead in the rest of Canada over the Liberals (35%)

**Q** If the federal election were held today, how likely would you be to vote for each of the following federal political parties? Please answer on a scale from 0 to 10 where 0 means you definitely will not vote for that party and 10 means you definitely will vote for that party.
[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]
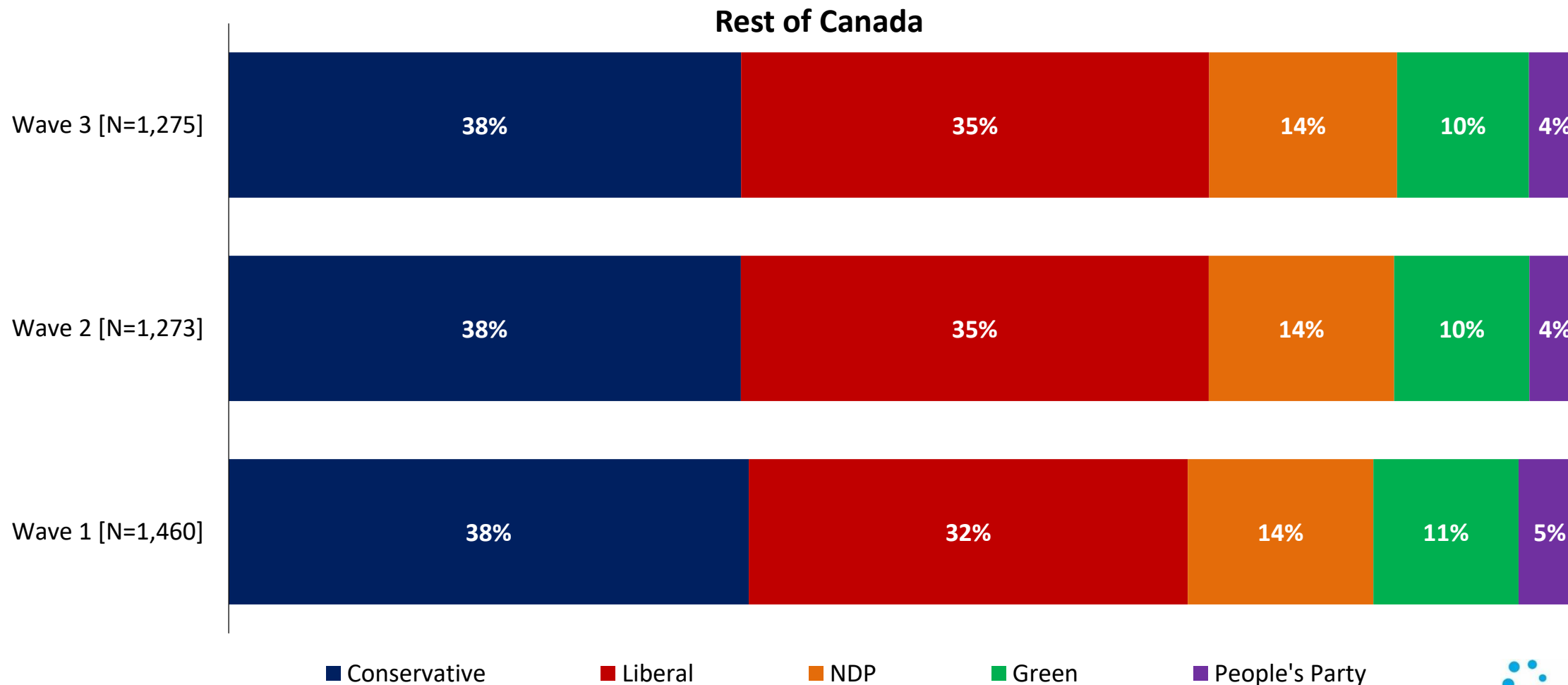
**Rest of Canada**



| | Conservative | Liberal | NDP | Green | People's Party |
|---|---|---|---|---|---|
| Wave 3 [N=1,275] | 38% | 35% | 14% | 10% | 4% |
| Wave 2 [N=1,273] | 38% | 35% | 14% | 10% | 4% |
| Wave 1 [N=1,460] | 38% | 32% | 14% | 11% | 5% |

Conservative · Liberal · NDP · Green · People's Party

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# Federal Party ID: Outside of Quebec, the Liberals and Conservatives are tied; in Quebec, the Liberals lead by double digits on ID

**Q** Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents; n=2,300]



Rest of Canada

Conservative 29% | Liberal 29% | NDP 10% | Green/PPC/Other 7% | Unaligned 24%

n=1,763

Quebec

Conservative 10% | Liberal 30% | NDP 7% | Bloc 18% | Green/PPC/Other 7% | Unaligned 29%

n=537

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# Vote by Party ID: 88% of Conservative partisans say they would vote CPC, while 83% of Liberals say they would vote for the LPC

**Q** Decided Vote BY Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[Vote choice defined as the party a respondent ranks the highest. Ties are treated as undecided voters. Voters who are undecided or select don't know for every party are not shown]
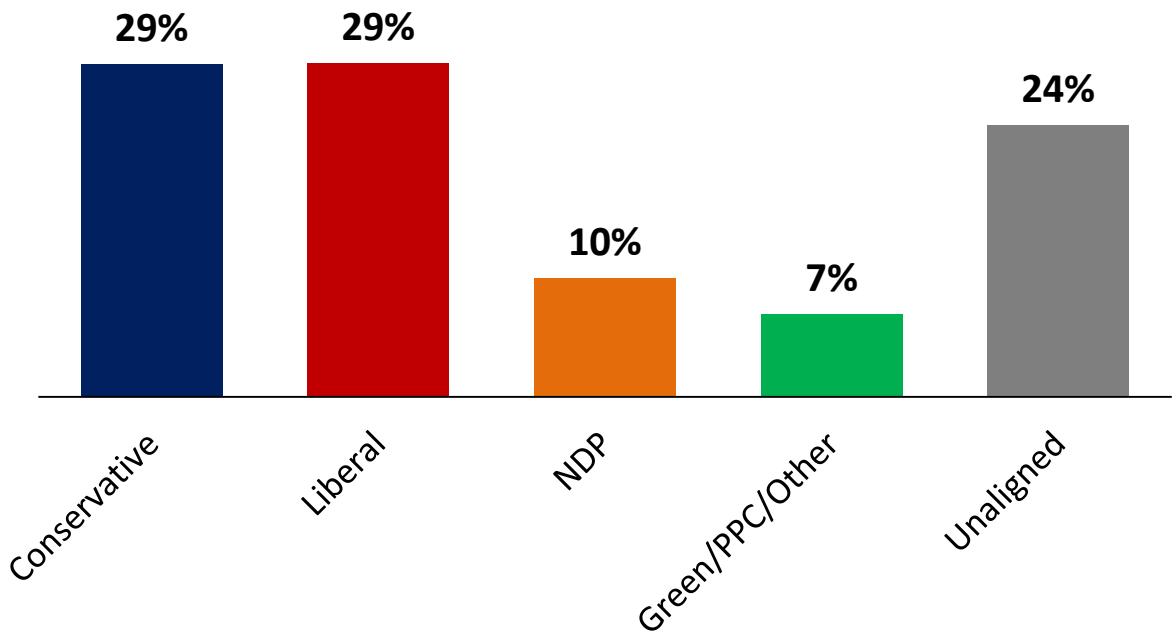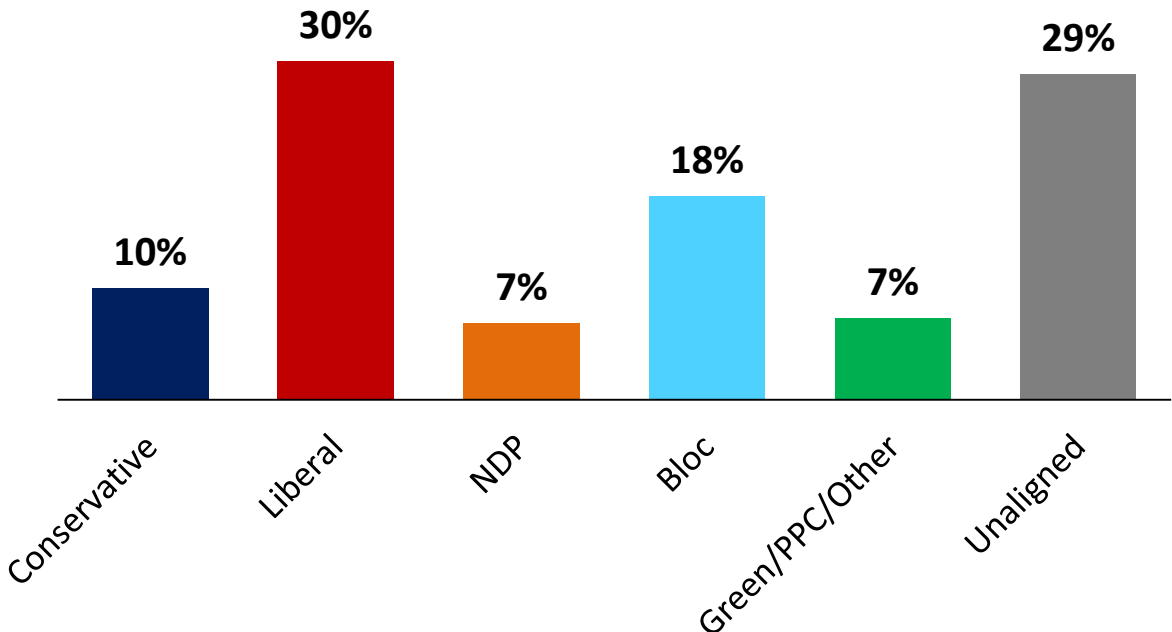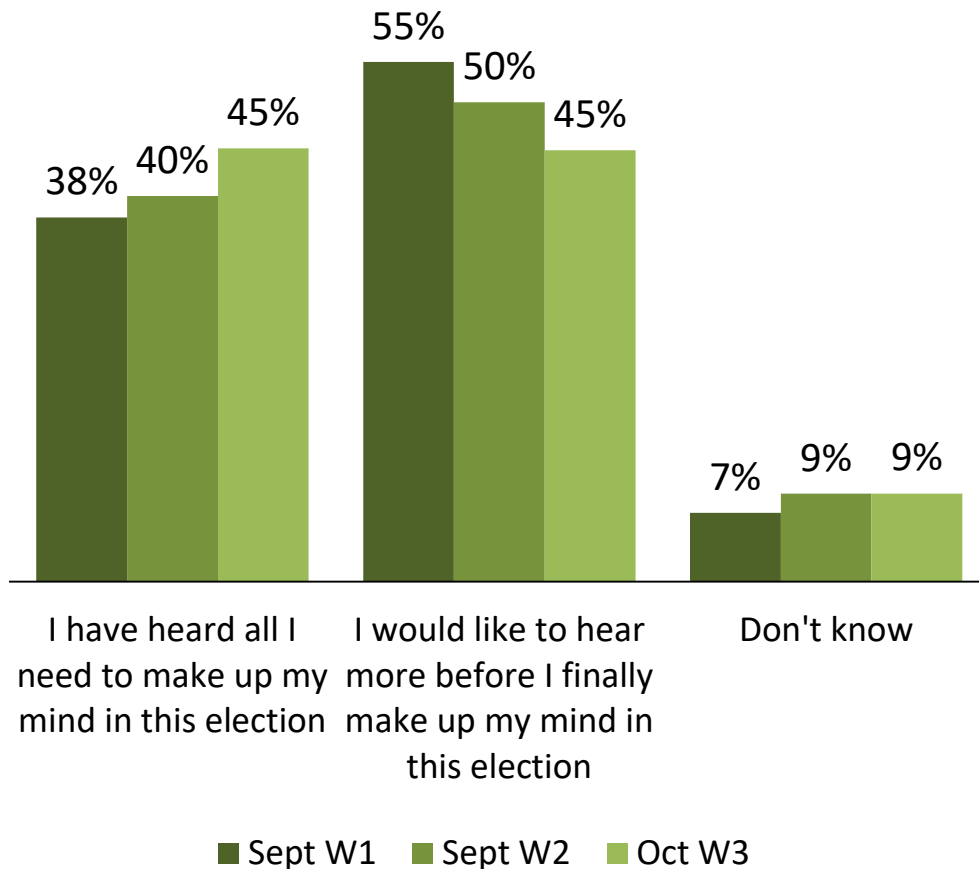
## Party ID

| Decided Vote | Conservative | Liberal | NDP | Bloc [QC Only] | Green | Unaligned |
|---|---|---|---|---|---|---|
| **Conservative** | 88% | 6% | 6% | 3% | 6% | 31% |
| **Liberal** | 5% | 83% | 13% | 4% | 5% | 28% |
| **NDP** | 3% | 5% | 74% | 2% | 1% | 15% |
| **Bloc** | 0% | 0% | 0% | 89% | 1% | 4% |
| **Green** | 2% | 4% | 5% | 2% | 85% | 15% |
| **People's Party** | 2% | 2% | 1% | 0% | 3% | 8% |

**Note:** PPC/Other not shown due to small sample size (n=28).
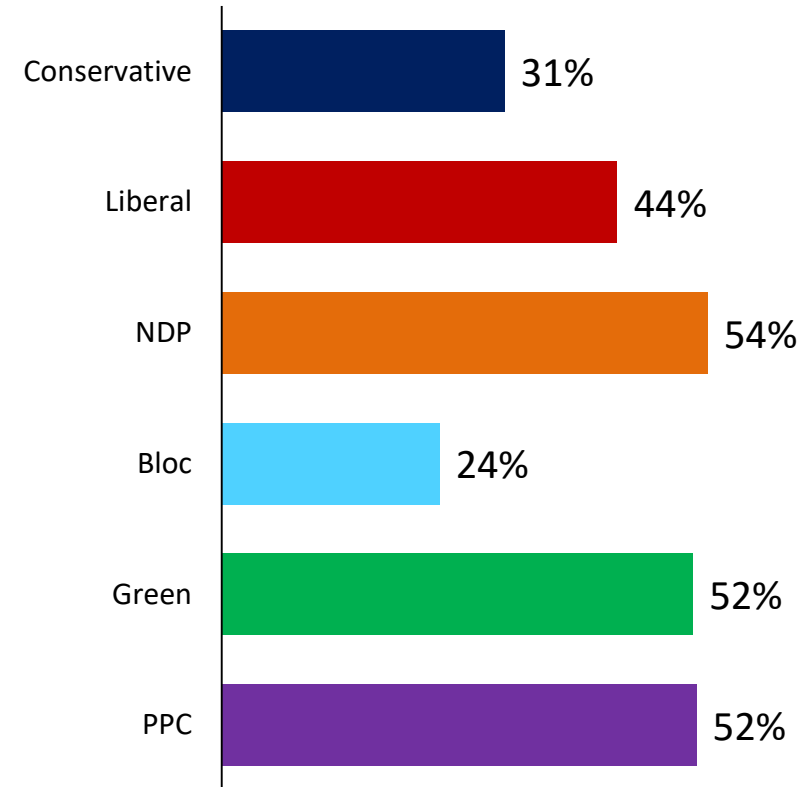
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# Satisficing: Conservative and Bloc voters are the least likely to say they would like to hear more information

**Q** Which statement is closest to your view about the upcoming federal election?



Left chart:

**I have heard all I need to make up my mind in this election**
- Sept W1: 38%
- Sept W2: 40%
- Oct W3: 45%

**I would like to hear more before I finally make up my mind in this election**
- Sept W1: 55%
- Sept W2: 50%
- Oct W3: 45%

**Don't know**
- Sept W1: 7%
- Sept W2: 9%
- Oct W3: 9%

Legend: ■ Sept W1  ■ Sept W2  ■ Oct W3

**% Would like to hear more By current vote choice**

- Conservative: 31%
- Liberal: 44%
- NDP: 54%
- Bloc: 24%
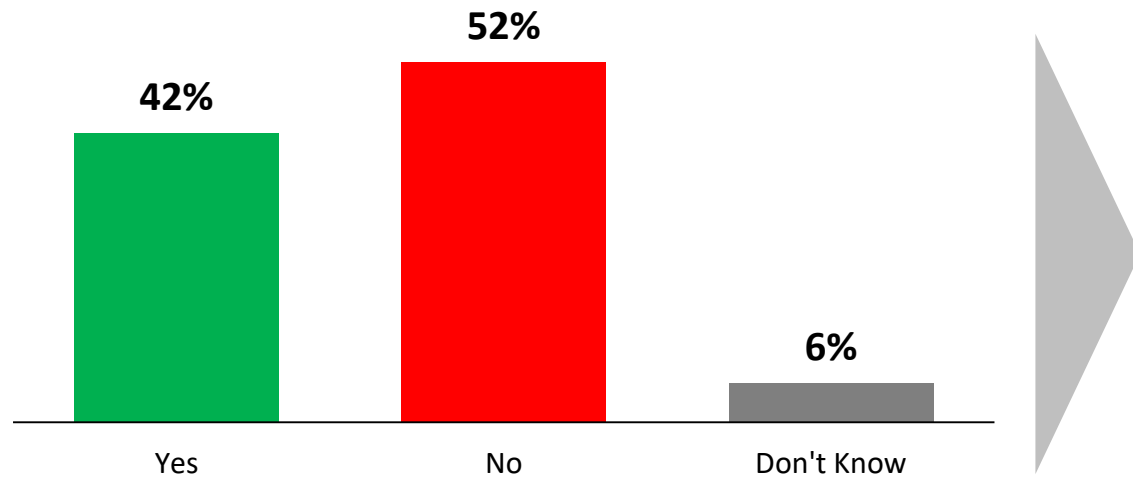- Green: 52%
- PPC: 52%

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# Leader Debate

# Debate Attention: Over 4-in-10 (42%) have heard about the debate; among those who did, a third (33%) say they watched it

**Q** Have you read, seen, or heard anything about the French language federal leader's debate on TVA that was held on Wednesday, October 2nd?
[Asked of all respondents, n=2,300]

- Yes: **42%**
- No: **52%**
- Don't Know: **6%**

**Q** Did you happen to watch the leaders' debate yourself?
[Only of those who RSH about it; n=966]
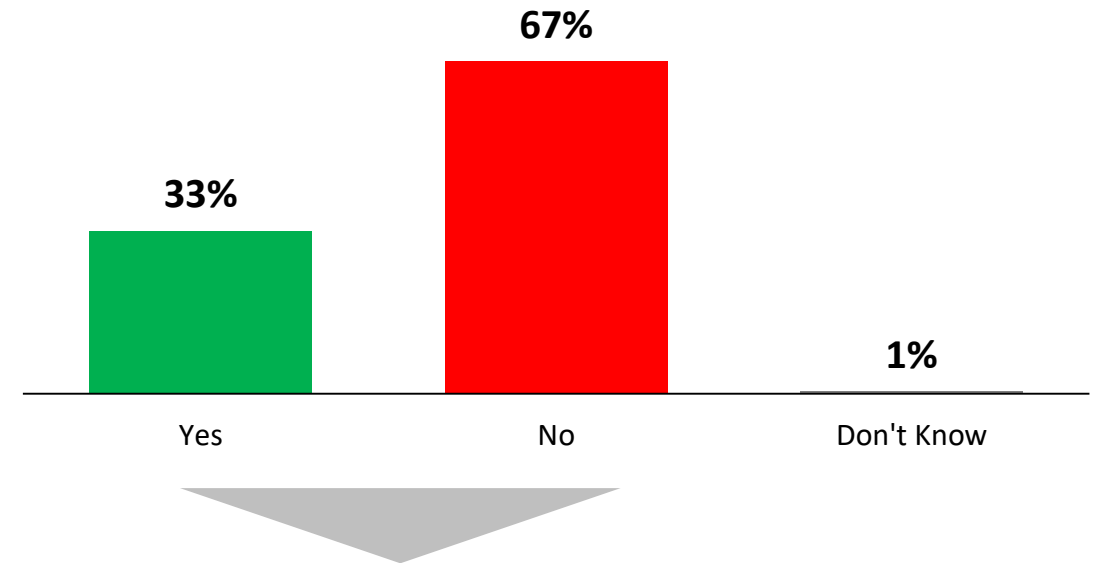
- Yes: **33%**
- No: **67%**
- Don't Know: **1%**

**Q** Did you watch all of the debate or just some of it?
[Only of those who watched debate; n=316]

- All: **42%**
- Most: **35%**
- Some: **23%**
- Don't know: **0%**

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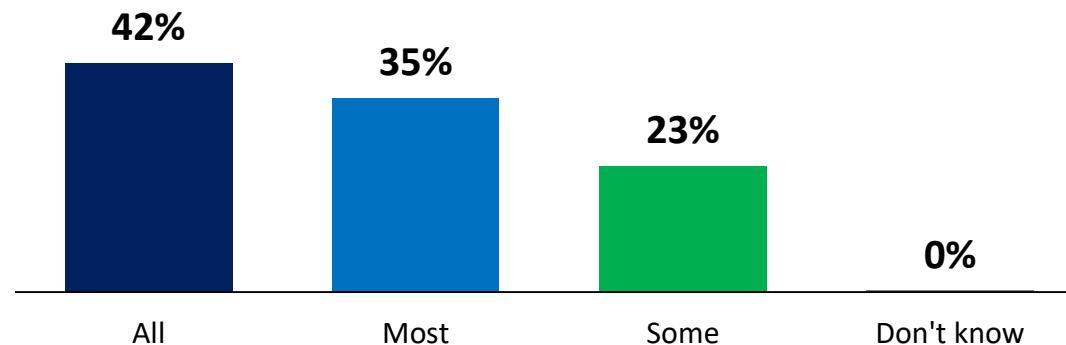
# Debate Performance by Party ID: 22% say that Justin Trudeau performed best at the debate, followed closely by 16% saying Blanchet

**Q** In your opinion which leader did the best in that debate? BY Party ID
[asked of all respondents who recall at least something about the debate; n=966]

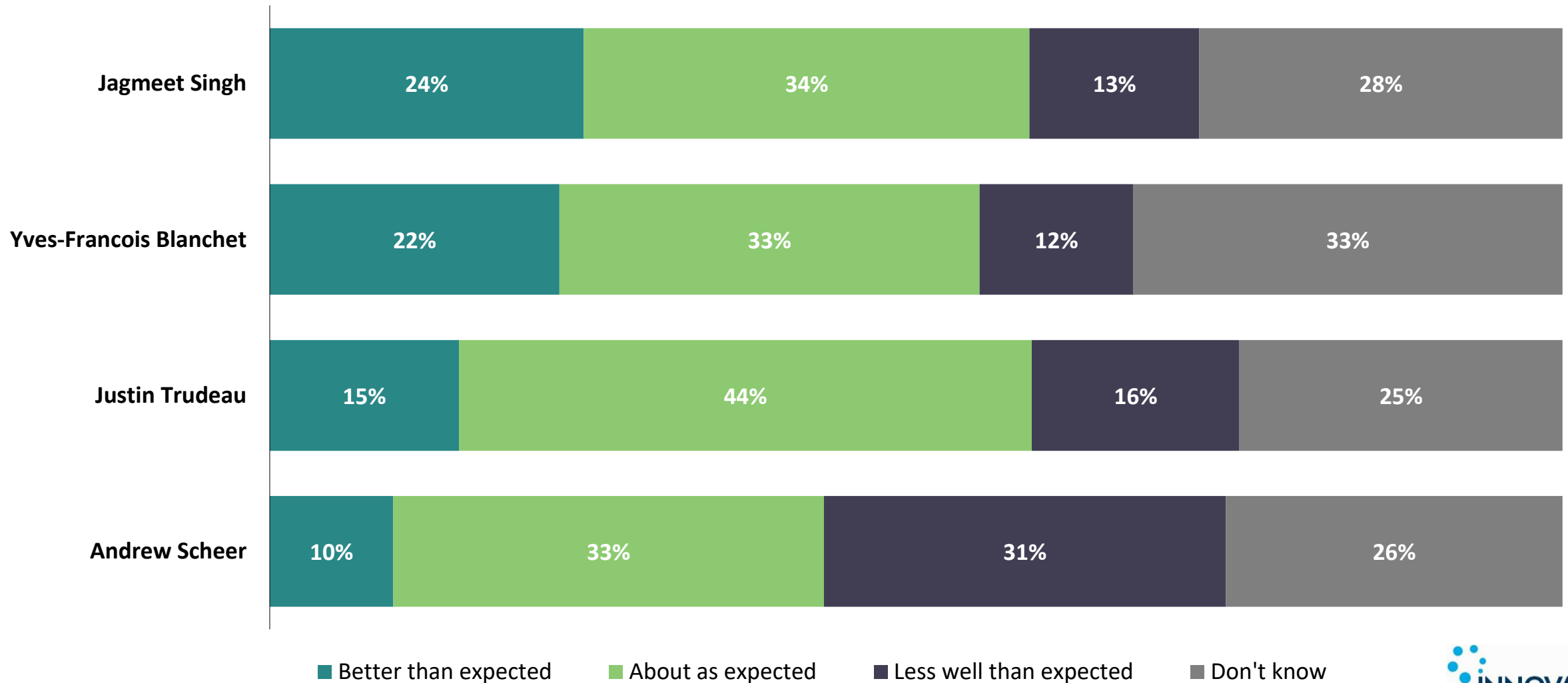| | Andrew Scheer | Justin Trudeau | Jagmeet Singh | Yves-Francois Blanchet | All did equally well | No one | Don't know |
|---|---|---|---|---|---|---|---|
| **Total [N=966]** | 11% | 22% | 11% | 16% | 5% | 10% | 26% |
| **Party ID** | | | | | | | |
| **Liberal [N=326]** | 3% | 45% | 8% | 9% | 5% | 8% | 22% |
| **CPC [N=230]** | 30% | 5% | 6% | 11% | 6% | 10% | 31% |
| **NDP [N=83]** | 5% | 11% | 35% | 11% | 1% | 6% | 30% |
| **Bloc [N=73]** | | 7% | 3% | 75% | 5% | 2% | 8% |
| **Green/ PPC/ Other [N=77]** | 9% | 19% | 19% | 11% | 8% | 17% | 17% |
| **Unaligned [N=178]** | 7% | 12% | 10% | 13% | 4% | 18% | 35% |

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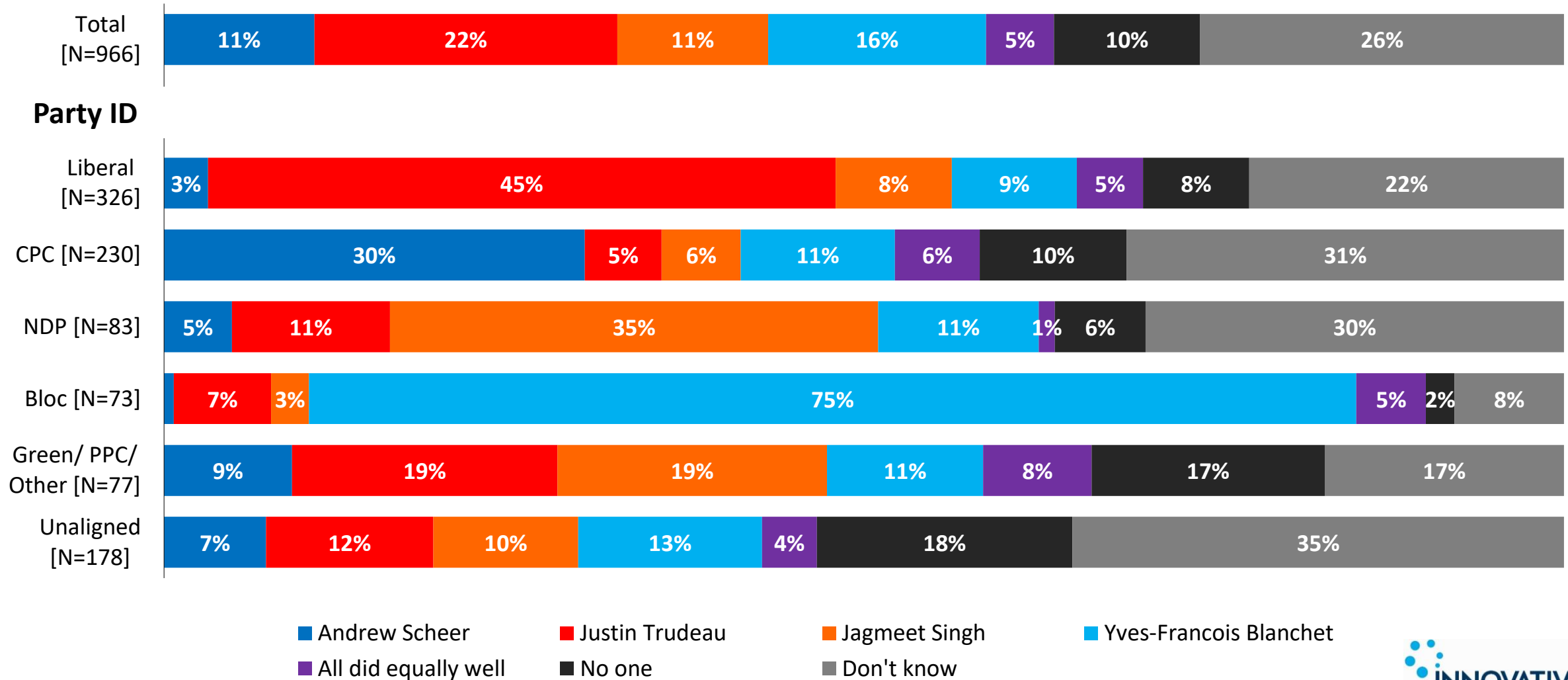
# Leader Performance: One-in-four (24%) say Jagmeet Singh exceeded expectations, while 31% say Andrew Scheer fell below theirs

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate?
[asked of all respondents who recall at least something about the debate; n=966]



| Leader | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Jagmeet Singh | 24% | 34% | 13% | 28% |
| Yves-Francois Blanchet | 22% | 33% | 12% | 33% |
| Justin Trudeau | 15% | 44% | 16% | 25% |
| Andrew Scheer | 10% | 33% | 31% | 26% |

■ Better than expected   ■ About as expected   ■ Less well than expected   ■ Don't know
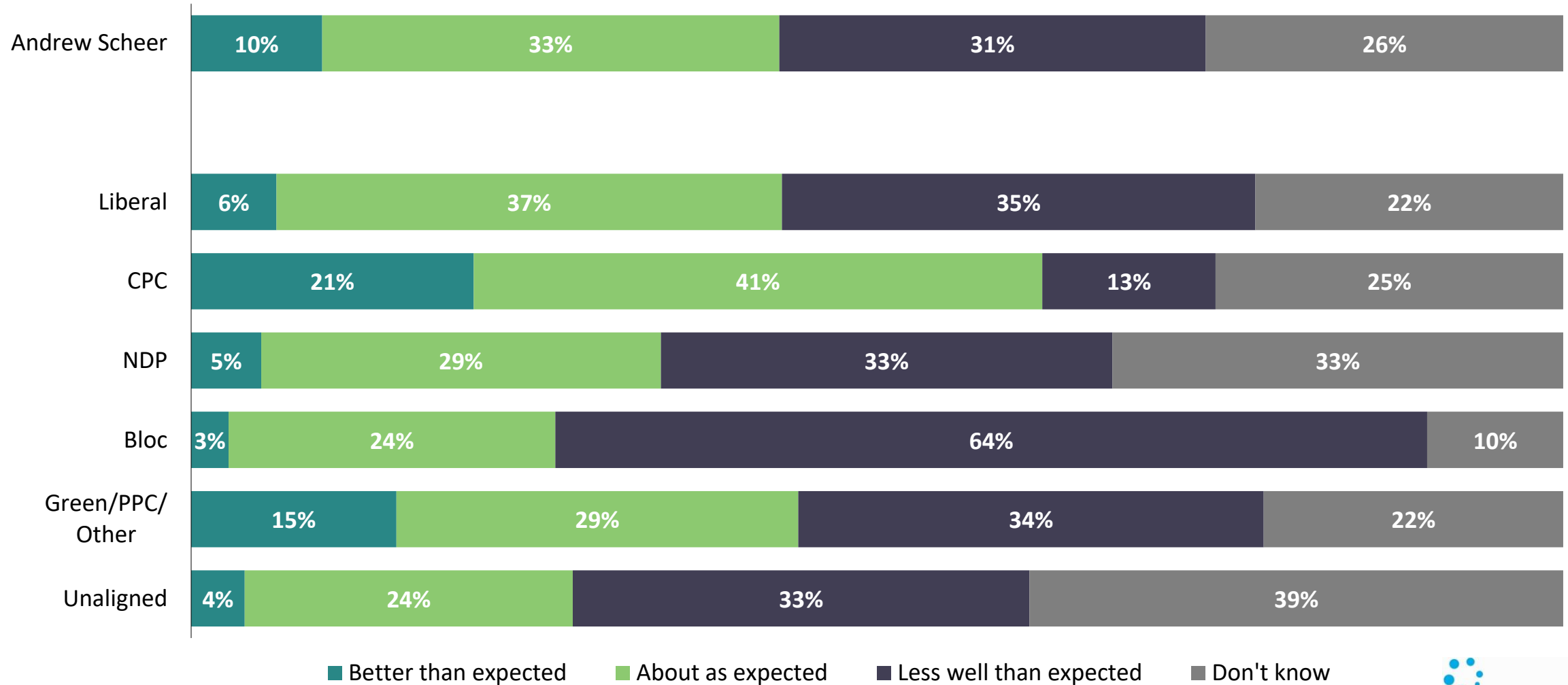
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# Scheer Performance by Party ID: Nearly one-in-three say that Andrew Scheer did less well than they had expected (31%)

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate? **Andrew Scheer** by Party ID

[asked of all respondents who recall at least something about the debate; n=966]

| Party ID | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Andrew Scheer | 10% | 33% | 31% | 26% |
| Liberal | 6% | 37% | 35% | 22% |
| CPC | 21% | 41% | 13% | 25% |
| NDP | 5% | 29% | 33% | 33% |
| Bloc | 3% | 24% | 64% | 10% |
| Green/PPC/Other | 15% | 29% | 34% | 22% |
| Unaligned | 4% | 24% | 33% | 39% |

■ Better than expected  ■ About as expected  ■ Less well than expected  ■ Don't know
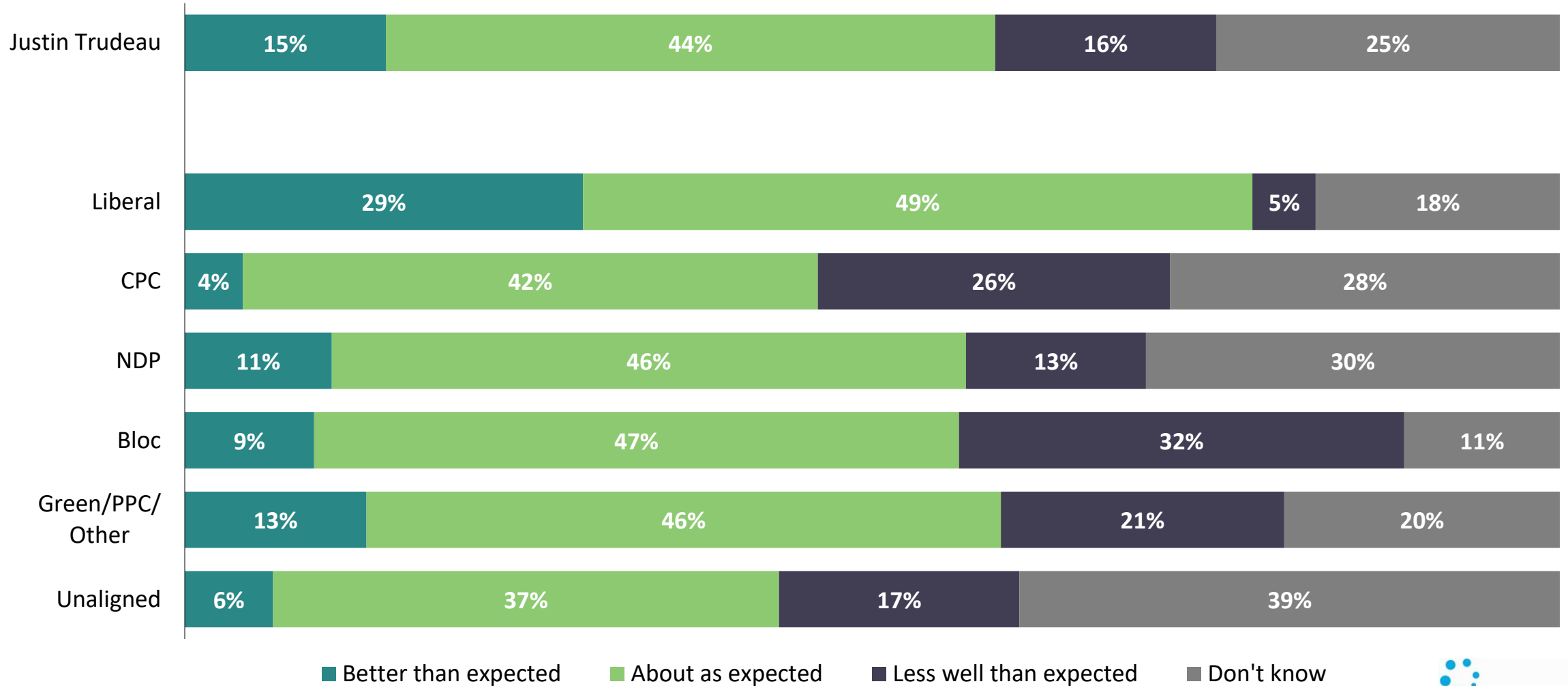
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# Trudeau Performance by Party ID: Nearly half feel that Justin Trudeau performed as expected (44%); 15% say he exceeded their expectations

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate? **Justin Trudeau** by Party ID

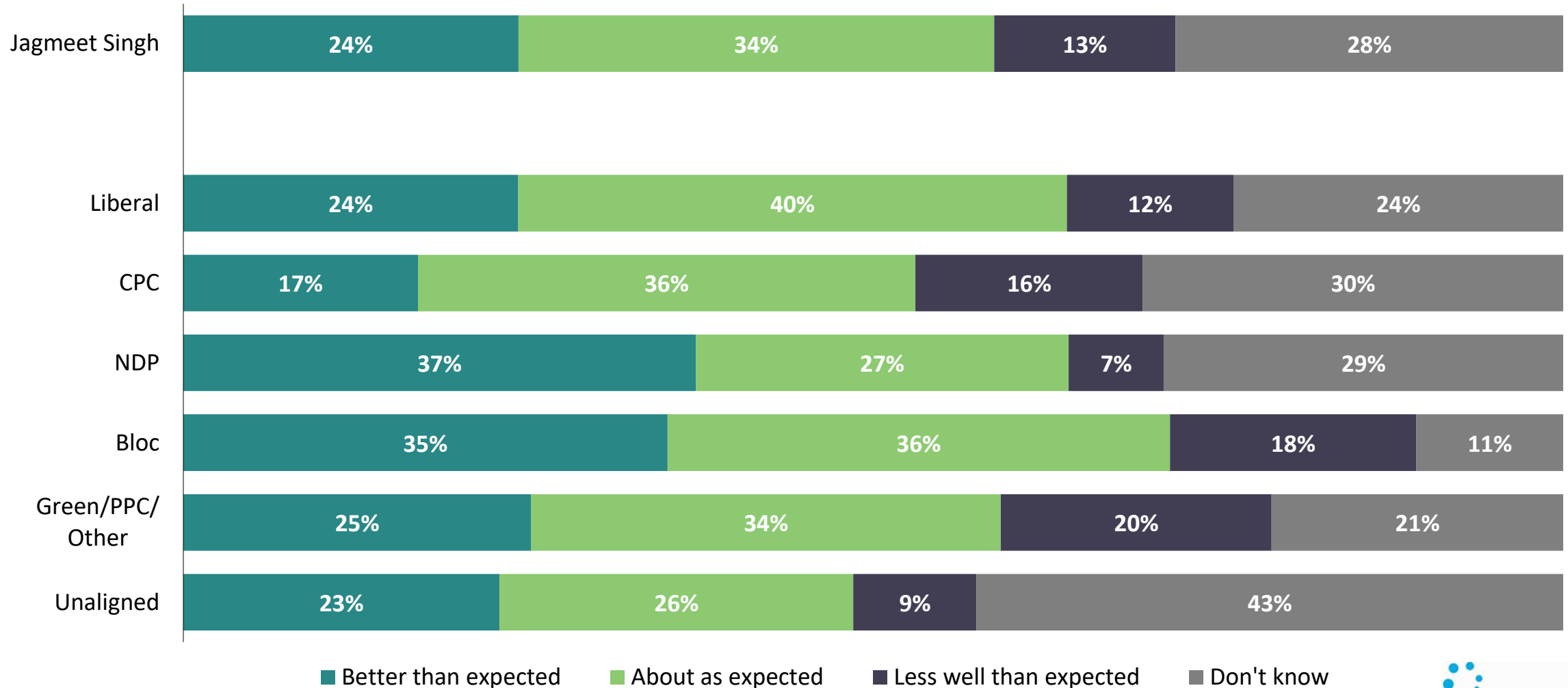[asked of all respondents who recall at least something about the debate; n=966]

| Party ID | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Justin Trudeau | 15% | 44% | 16% | 25% |
| Liberal | 29% | 49% | 5% | 18% |
| CPC | 4% | 42% | 26% | 28% |
| NDP | 11% | 46% | 13% | 30% |
| Bloc | 9% | 47% | 32% | 11% |
| Green/PPC/Other | 13% | 46% | 21% | 20% |
| Unaligned | 6% | 37% | 17% | 39% |

Legend: ■ Better than expected ■ About as expected ■ Less well than expected ■ Don't know

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# Singh Performance by Party ID: Just under a quarter say that Singh exceeded expectations (24%); 13% say he did worse than expected

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate? **Jagmeet Singh** by Party ID

[asked of all respondents who recall at least something about the debate; n=966]
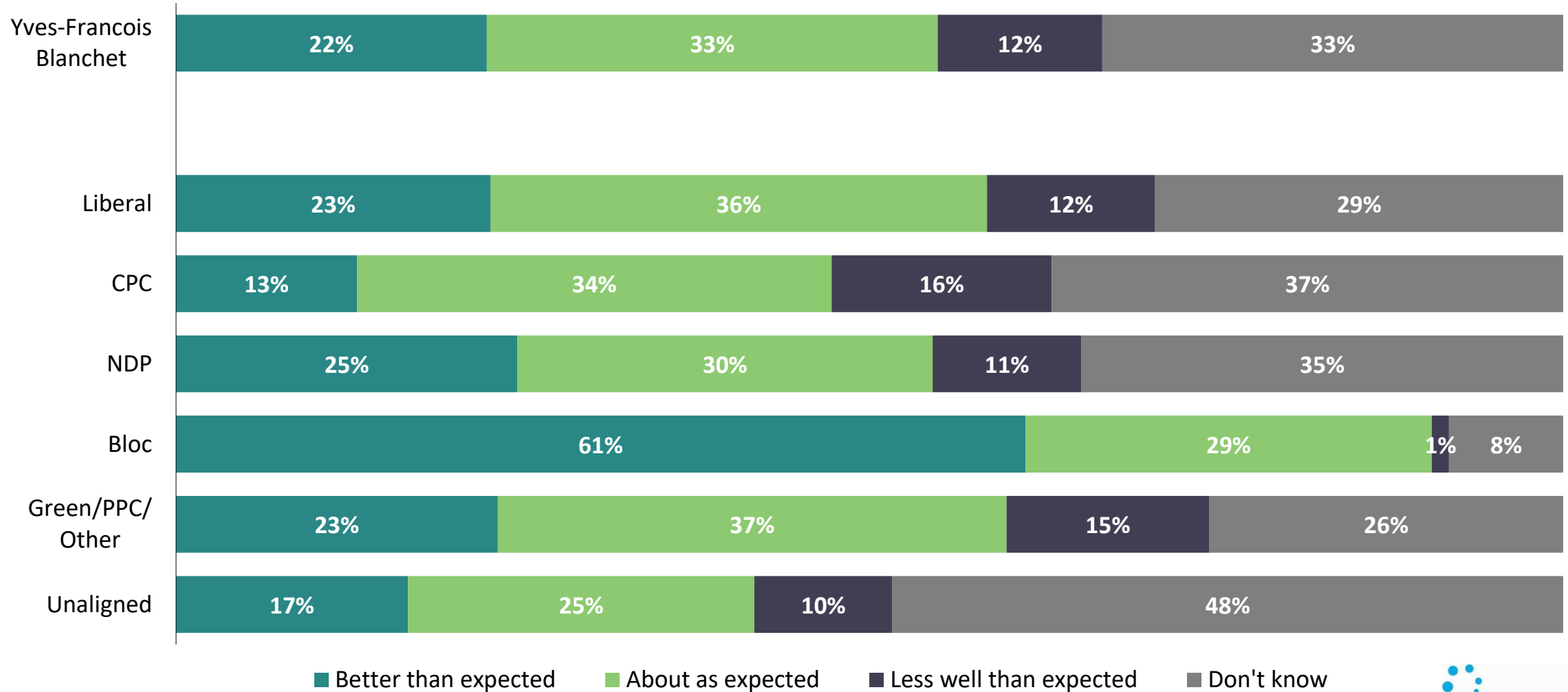
| Party ID | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Jagmeet Singh | 24% | 34% | 13% | 28% |
| Liberal | 24% | 40% | 12% | 24% |
| CPC | 17% | 36% | 16% | 30% |
| NDP | 37% | 27% | 7% | 29% |
| Bloc | 35% | 36% | 18% | 11% |
| Green/PPC/Other | 25% | 34% | 20% | 21% |
| Unaligned | 23% | 26% | 9% | 43% |

■ Better than expected  ■ About as expected  ■ Less well than expected  ■ Don't know

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# Blanchet Performance by Party ID: Just over 1-in-5 (22%) say that Blanchet performed better than they had expected

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate? **Yves-Francois Blanchet** by Party ID

[asked of all respondents who recall at least something about the debate; n=966]
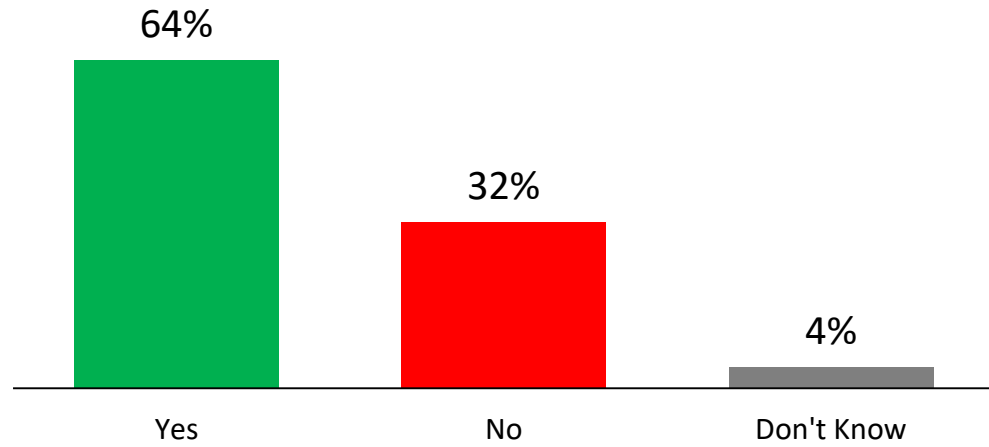
| Party ID | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Yves-Francois Blanchet | 22% | 33% | 12% | 33% |
| Liberal | 23% | 36% | 12% | 29% |
| CPC | 13% | 34% | 16% | 37% |
| NDP | 25% | 30% | 11% | 35% |
| Bloc | 61% | 29% | 1% | 8% |
| Green/PPC/Other | 23% | 37% | 15% | 26% |
| Unaligned | 17% | 25% | 10% | 48% |

Legend: ■ Better than expected  ■ About as expected  ■ Less well than expected  ■ Don't know

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# Leader Debate
*In Quebec*

# Debate Attention in Quebec: In Quebec, nearly 2-in-3 (64%) say they have read, seen, or heard about the debate

**Q** Have you read, seen, or heard anything about the French language federal leader's debate on TVA that was held on Wednesday, October 2nd?
[Asked of all respondents, n=537]

**Q** Did you happen to watch the leaders' debate yourself?
[Only of those who RSH about it; n=342]
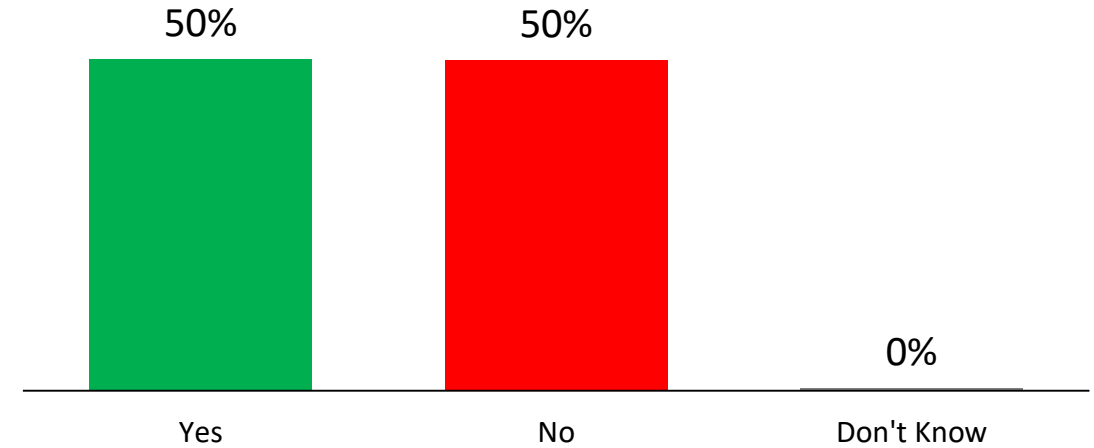


| | |
|---|---|
| Yes | 64% |
| No | 32% |
| Don't Know | 4% |

| | |
|---|---|
| Yes | 50% |
| No | 50% |
| Don't Know | 0% |

**Q** Did you watch all of the debate or just some of it?
[Only of those who watched debate; n=171]

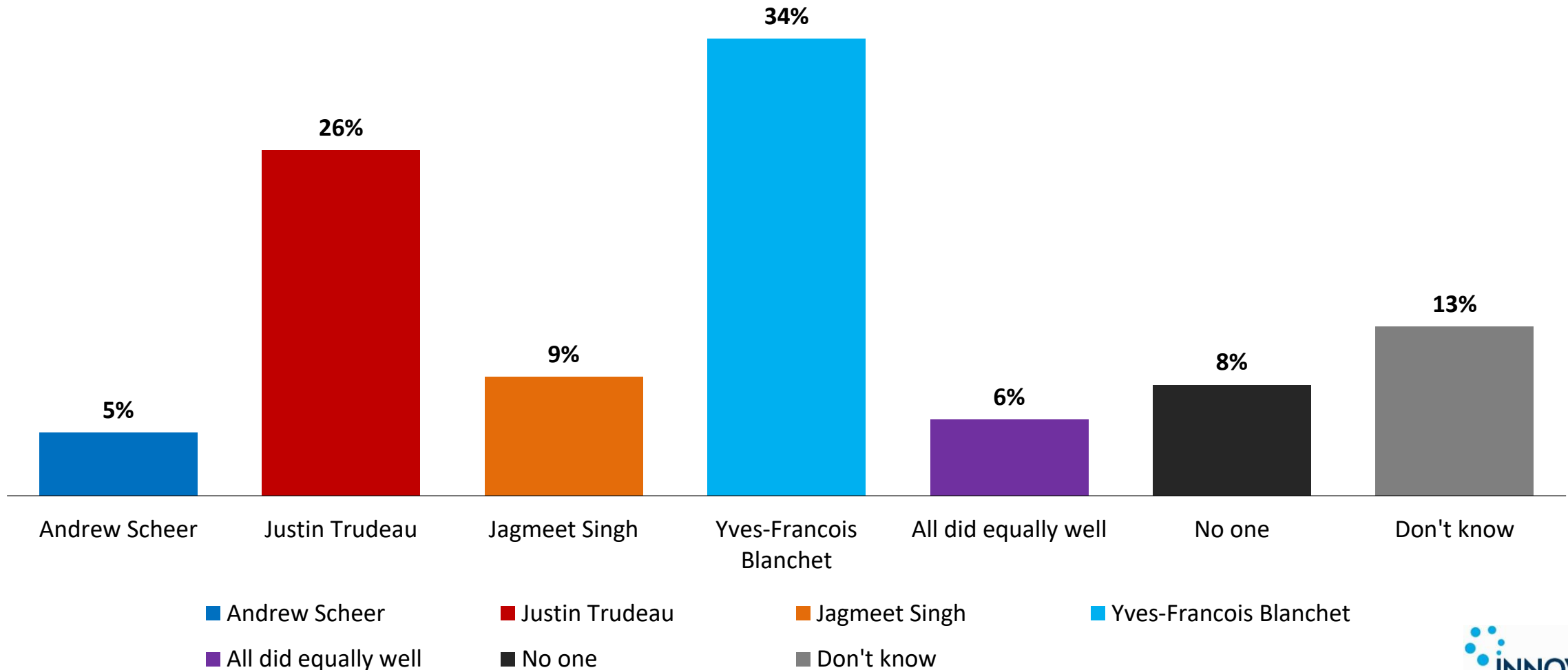| | |
|---|---|
| All | 44% |
| Most | 34% |
| Some | 23% |
| Don't know | 0% |

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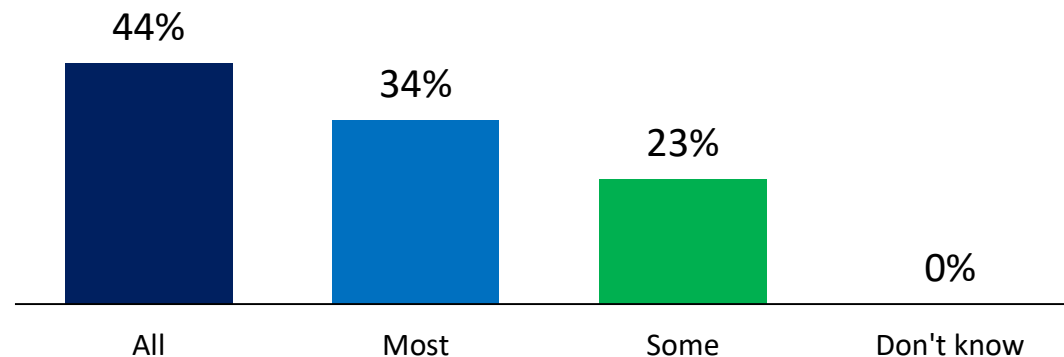
# Debate Performance in Quebec: In Quebec, a plurality say Blanchet won the debate (34%), followed closely by 26% who say Trudeau

**Q** **In your opinion which leader did the best in that debate?**
[asked of all respondents who recall at least something about the debate; showing respondents in Quebec only; n=342]
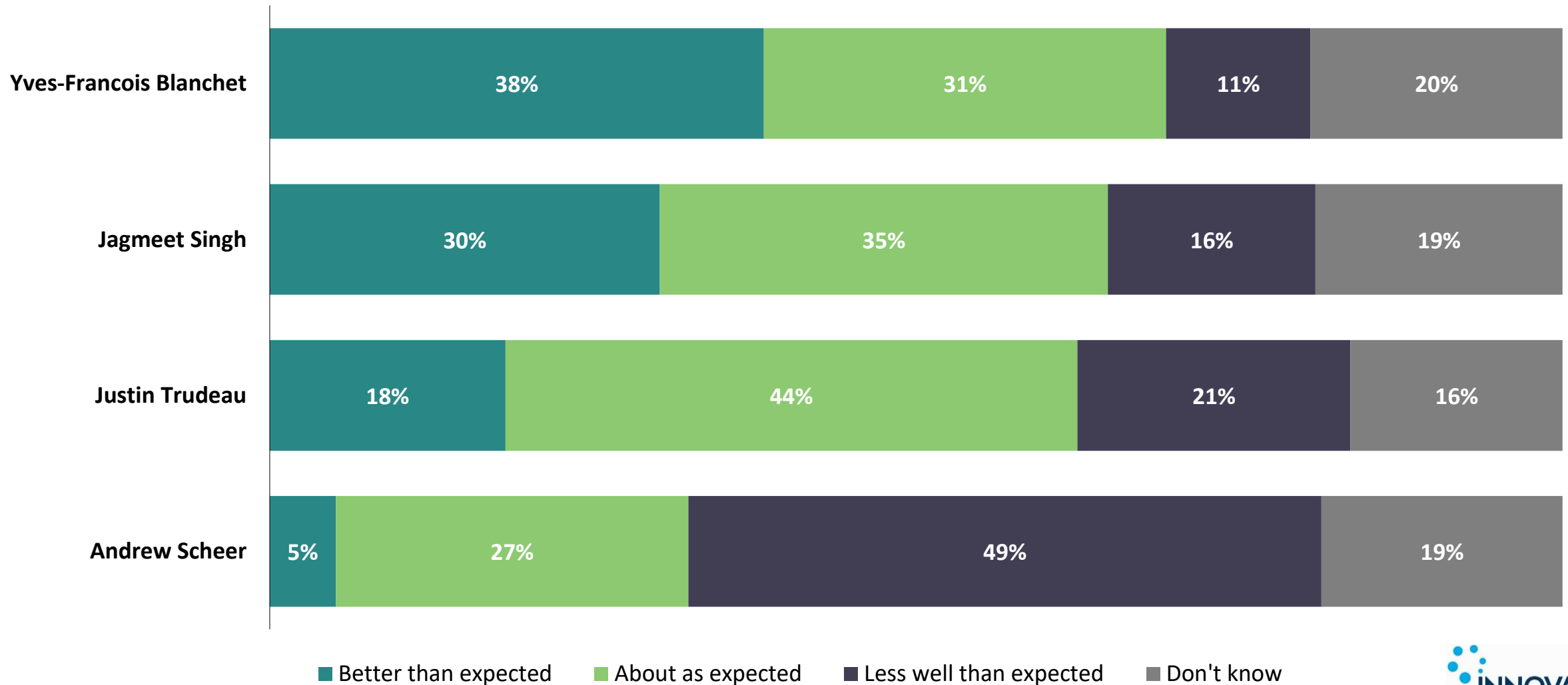


| Andrew Scheer | Justin Trudeau | Jagmeet Singh | Yves-Francois Blanchet |
| --- | --- | --- | --- |
| Andrew Scheer | Justin Trudeau | Jagmeet Singh | Yves-Francois Blanchet |
| All did equally well | No one | Don't know | |

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# Leader Performance: In Quebec, nearly 4-in-10 (38%) say Blanchet exceeded their expectations

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate?
[asked of all respondents who recall at least something about the debate; n=342]

| Leader | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Yves-Francois Blanchet | 38% | 31% | 11% | 20% |
| Jagmeet Singh | 30% | 35% | 16% | 19% |
| Justin Trudeau | 18% | 44% | 21% | 16% |
| Andrew Scheer | 5% | 27% | 49% | 19% |

Legend: Better than expected / About as expected / Less well than expected / Don't know

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Leader Debate
*In the rest of Canada*

# Debate Attention in the Rest of Canada: Outside of Quebec, more than a third (35%) say they read, saw, or heard about the debate
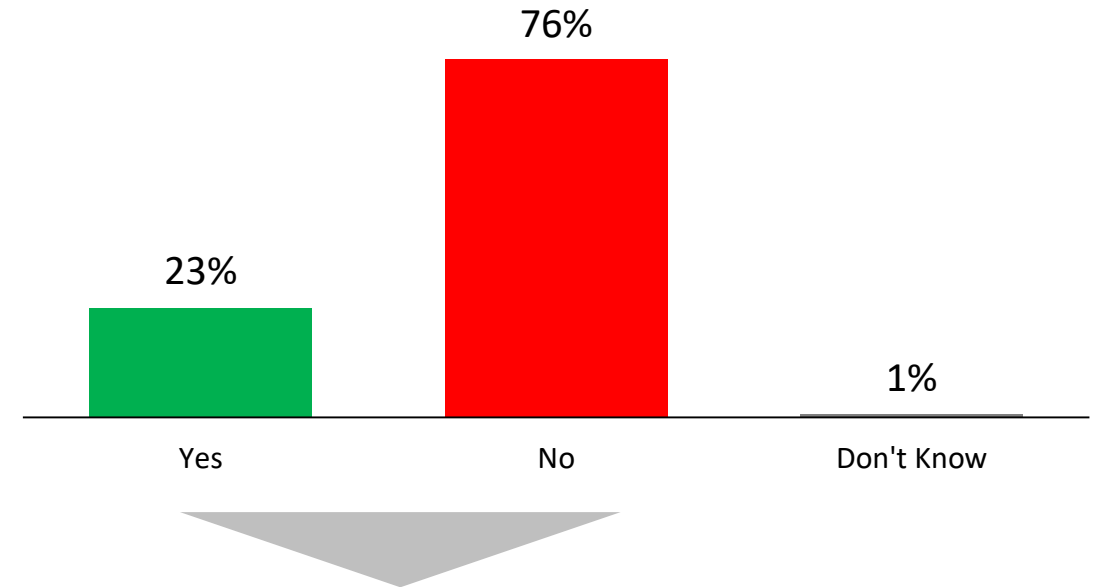
**Q** Have you read, seen, or heard anything about the French language federal leader's debate on TVA that was held on Wednesday, October 2nd?
[Showing only respondents in the rest of Canada; n=1,763]
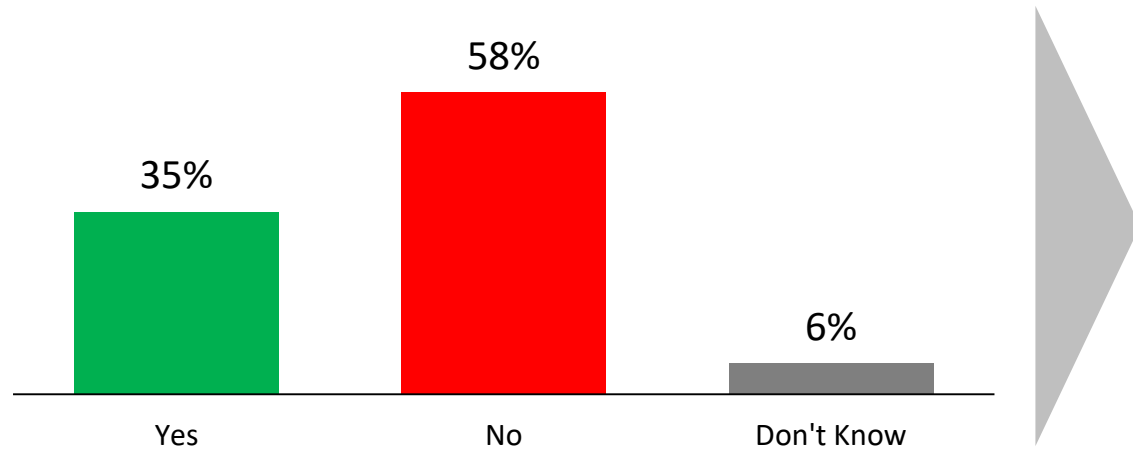
**Q** Did you happen to watch the leaders' debate yourself?
[Only of those who RSH about it in the rest of Canada; n=624]



- Yes: 35%
- No: 58%
- Don't Know: 6%

- Yes: 23%
- No: 76%
- Don't Know: 1%

**Q** Did you watch all of the debate or just some of it?
[Only of those who watched debate in the rest of Canada; n=145]

- All: 39%
- Most: 37%
- Some: 23%
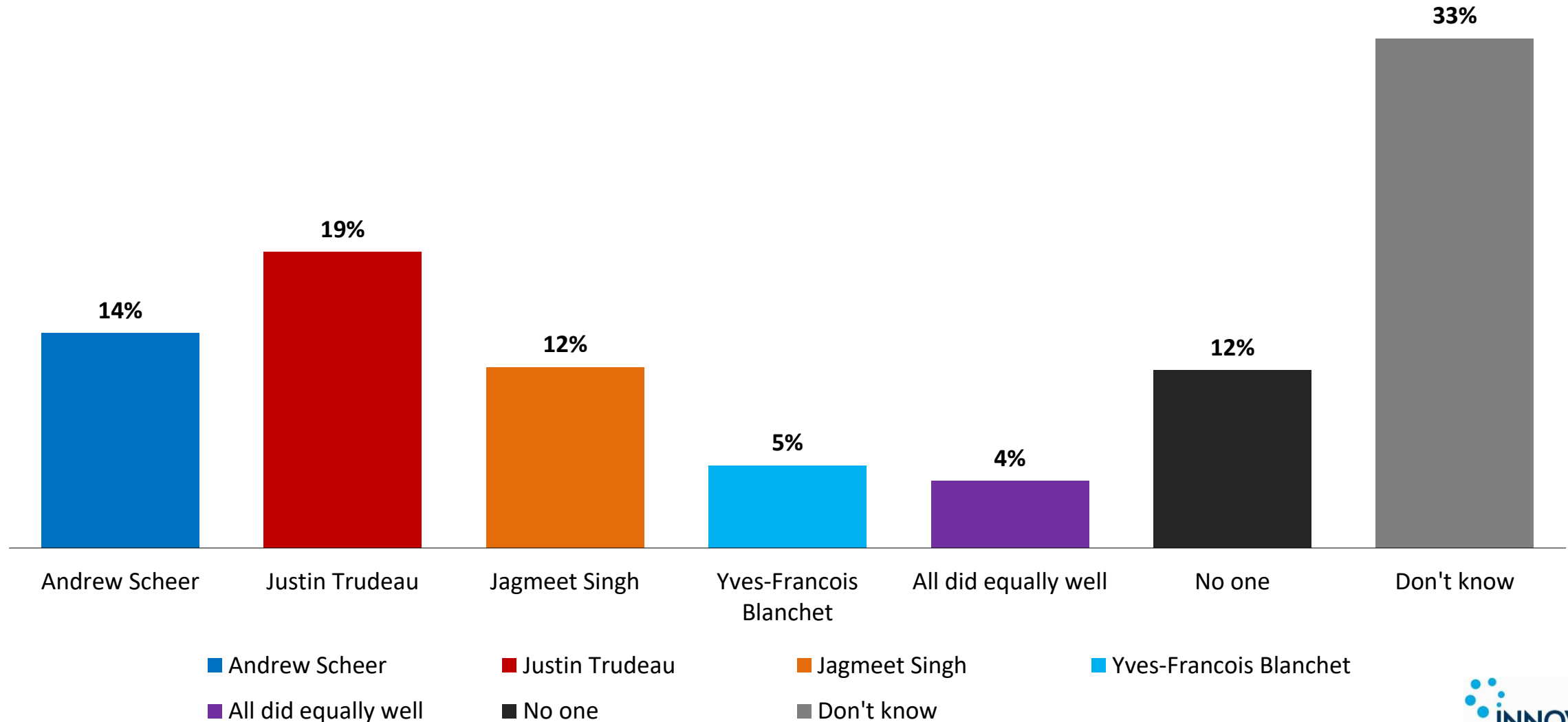- Don't know: 0%

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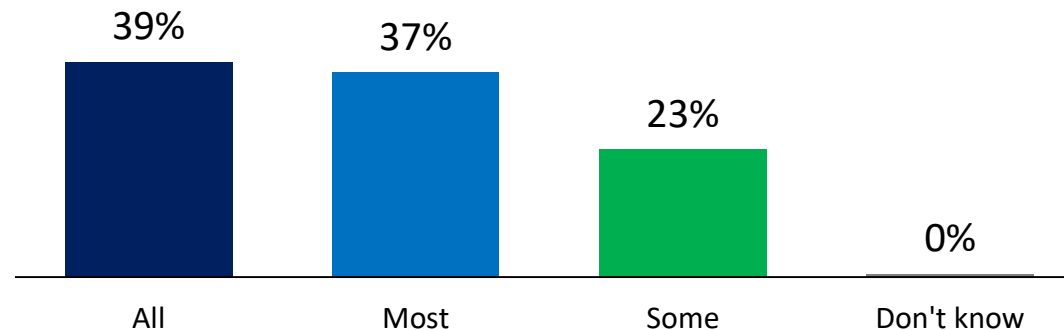
# Debate Performance in the rest of Canada: Outside of Quebec, a plurality say that Justin Trudeau performed best (19%)

**Q** In your opinion which leader did the best in that debate?
[asked of all respondents who recall at least something about the debate; showing respondents in the rest of Canada; n=624]
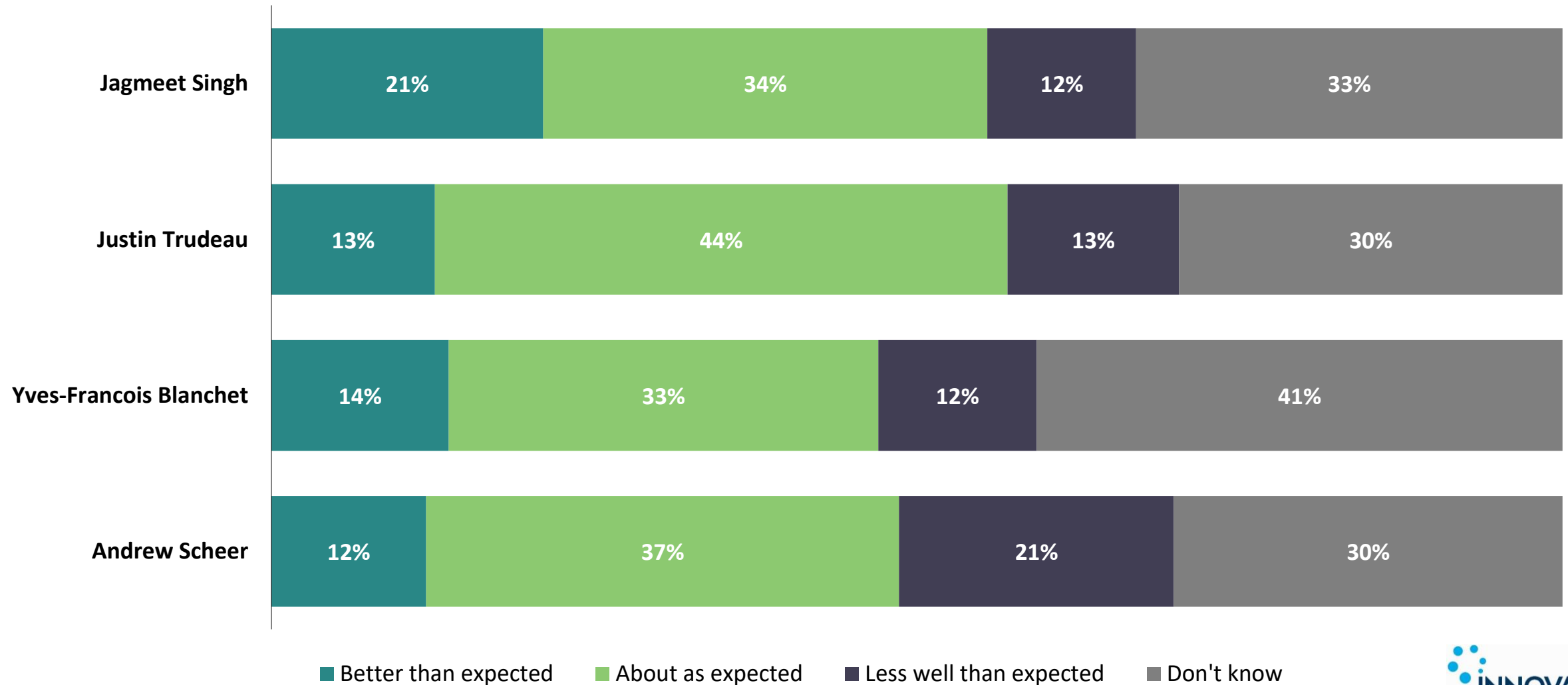


| Andrew Scheer | Justin Trudeau | Jagmeet Singh | Yves-Francois Blanchet |
| All did equally well | No one | Don't know | |

# Leader Performance in the rest of Canada: Outside of Quebec, one-in-five (21%) say that Jagmeet Singh exceed their expectations

**Q** For each leader, did they perform better than you expected, less well than you expected, or about as you expected in the leaders' debate?
[asked of all respondents who recall at least something about the debate; showing respondents in the rest of Canada; n=624]



| | Better than expected | About as expected | Less well than expected | Don't know |
|---|---|---|---|---|
| Jagmeet Singh | 21% | 34% | 12% | 33% |
| Justin Trudeau | 13% | 44% | 13% | 30% |
| Yves-Francois Blanchet | 14% | 33% | 12% | 41% |
| Andrew Scheer | 12% | 37% | 21% | 30% |

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# Time for Change

# Time for a Change Attitudes by Wave: Agreement that the Liberals are the best of a bad lot has risen since the first wave
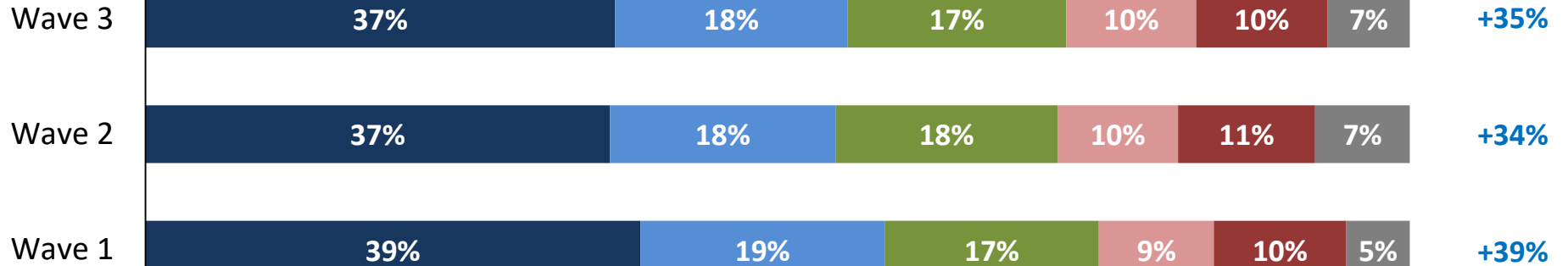
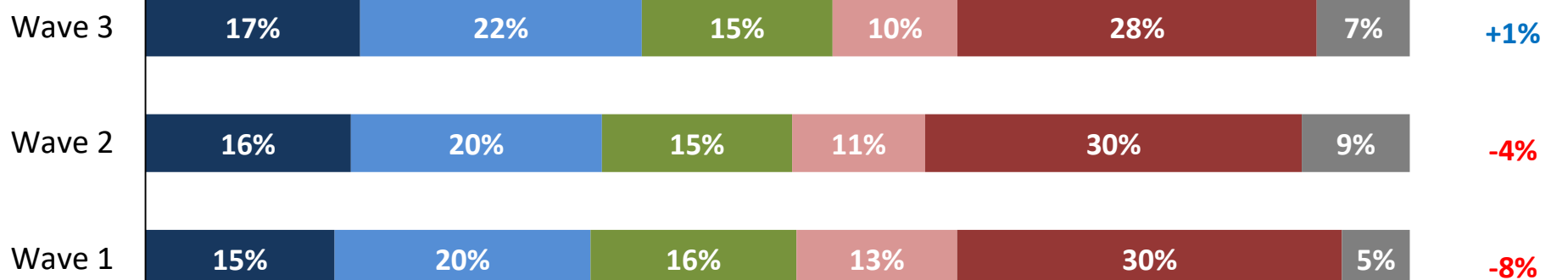**Q** Do you agree or disagree with the following statements?
[asked of all respondents; n=7,100 in all waves]

**Net Agreement**

**It is time for a change in government here in Canada**

| Wave | Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know | Net Agreement |
|------|------|------|------|------|------|------|------|
| Wave 3 | 37% | 18% | 17% | 10% | 10% | 7% | +35% |
| Wave 2 | 37% | 18% | 18% | 10% | 11% | 7% | +34% |
| Wave 1 | 39% | 19% | 17% | 9% | 10% | 5% | +39% |

**The Liberals may have their problems but they are still the best party to form government.**

| Wave | Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know | Net Agreement |
|------|------|------|------|------|------|------|------|
| Wave 3 | 17% | 22% | 15% | 10% | 28% | 7% | +1% |
| Wave 2 | 16% | 20% | 15% | 11% | 30% | 9% | -4% |
| Wave 1 | 15% | 20% | 16% | 13% | 30% | 5% | -8% |

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

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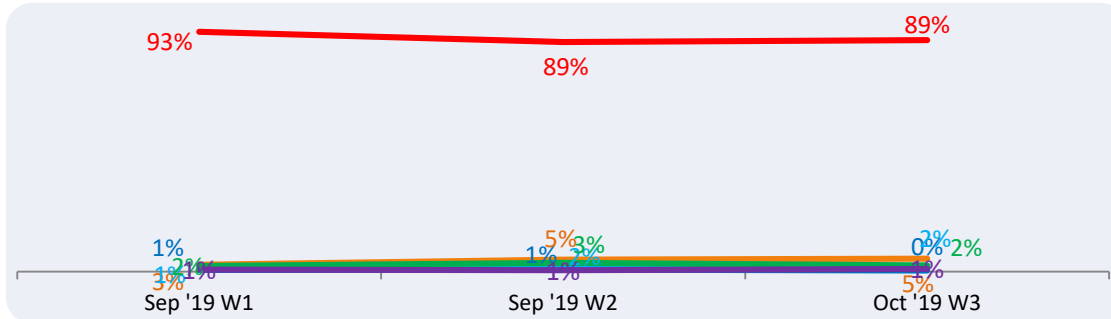# Time for a Change Segmentation: Creating the Segments

Based on the two agree/disagree statements "It is time for a change in government here in Canada" and "The Liberals may have their problems but they are still the best party to form government", we create a segmentation for analysis.

# Time for a Change Tracking: The Liberals are down from 44% to 37% among the 'Time for a Change LPC' group
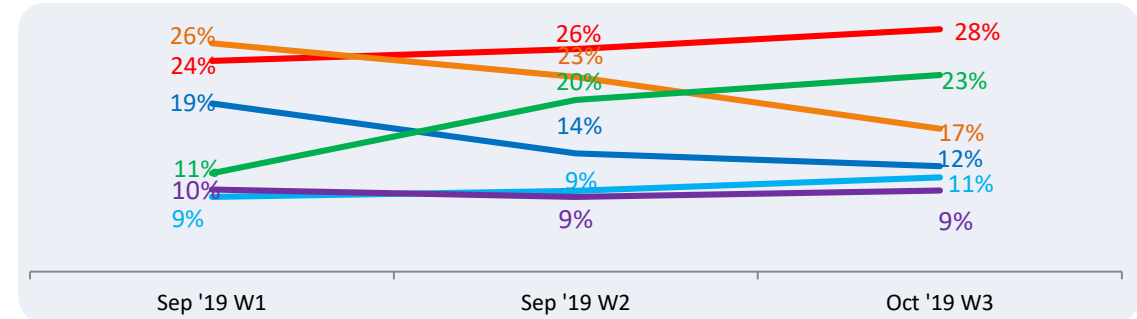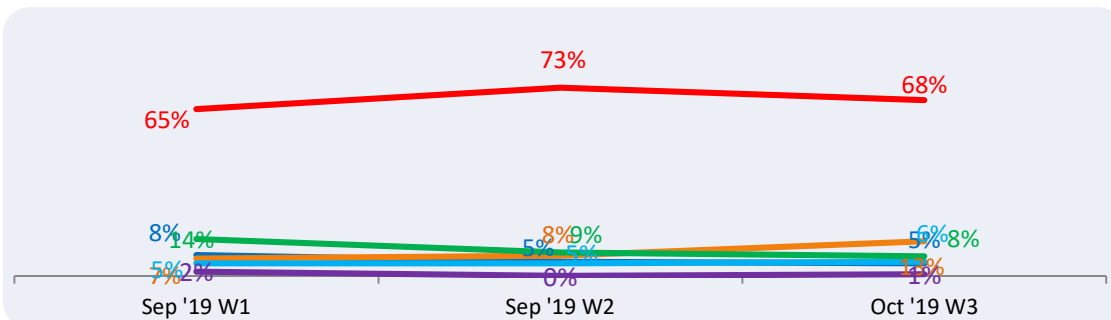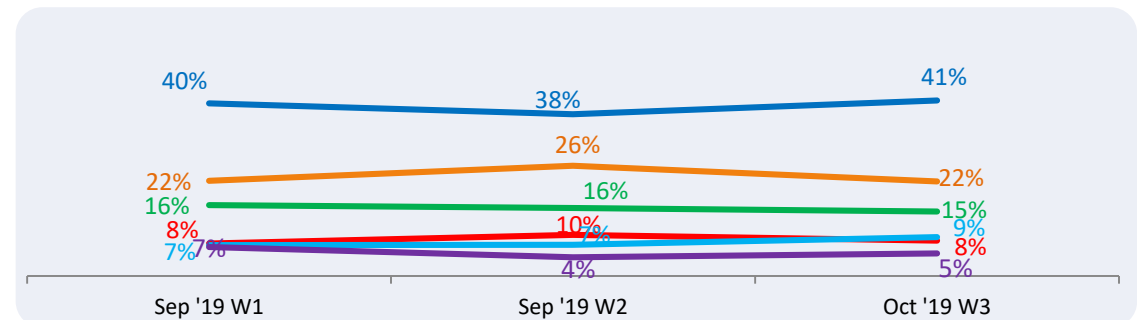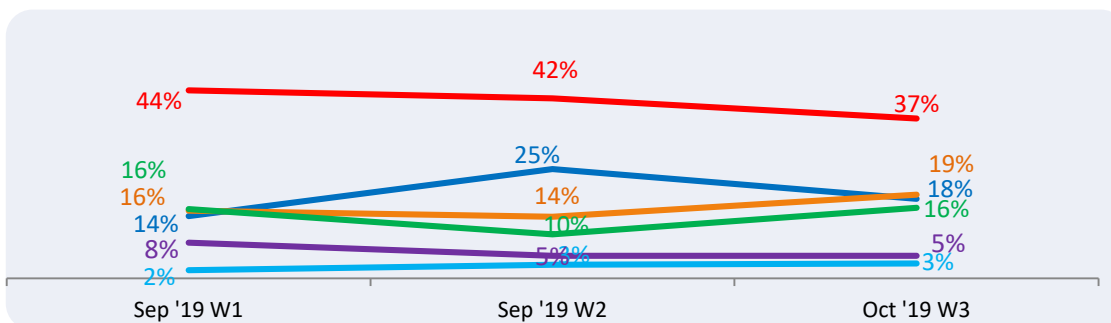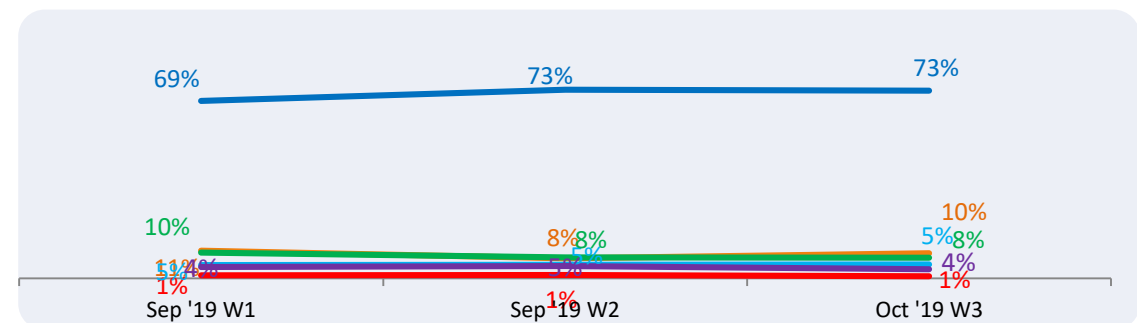
## Core LPC



93% — 89% — 89%
1% 5% 3% 0% 2%
2% 1% 1% 3% 5% 1%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

## Uncertain



26% 24% 19% 11% 10% 9%
26% 23% 20% 14% 9% 9%
28% 23% 17% 12% 11% 9%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

## Soft LPC



65% — 73% — 68%
8% 14% 5% 7% 2%
8% 9% 5% 5% 0%
5% 8% 5% 1%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

## Soft Anti-LPC



40% — 38% — 41%
22% 16% 8% 7%
26% 16% 10% 4%
22% 15% 9% 8% 5%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

## Time for a change LPC



44% — 42% — 37%
16% 16% 14% 8% 2%
25% 14% 10% 5%
19% 18% 16% 5% 3%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

## Hostile



69% — 73% — 73%
10% 1% 1% 1%
8% 8% 5% 1%
10% 5% 8% 4% 1%

Sep '19 W1 — Sep '19 W2 — Oct '19 W3

Note: Individual charts use different scales.
Use caution when comparing across charts.

| Decided vote: | Liberal | Conservative | NDP | Green | Bloc | PPC |

# Value Clusters

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# Core Political Values

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



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

36%
52%
12%

**Q** Is the main role of government …?



- **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**

58%
29%
12%
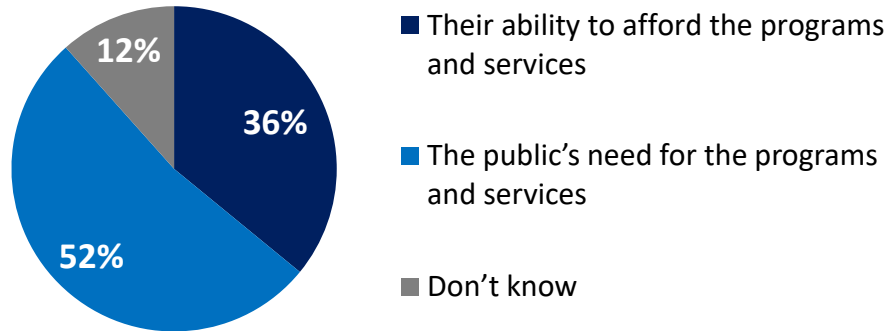
**Q** Which of the following statements best describes your personal point of view? The profit system …



- **… brings out the worst in human nature**
- **… teaches people the value of hard work and success**
- **Don't know**

36%
43%
21%
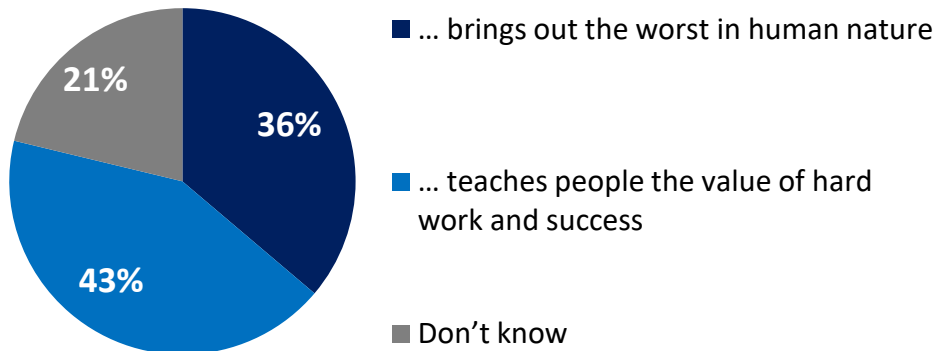
**Q** When it comes to government decision making, which of the following statements is closest to your view?



- **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**

49%
32%
19%

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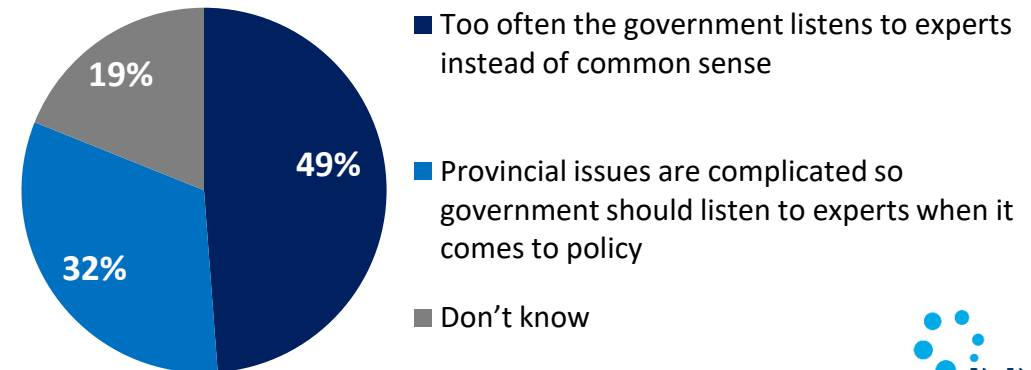
# Value Clusters: One-in-four (24%) voters are "Business Liberals"; another 22% are "Thrifty Moderates"

These clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.
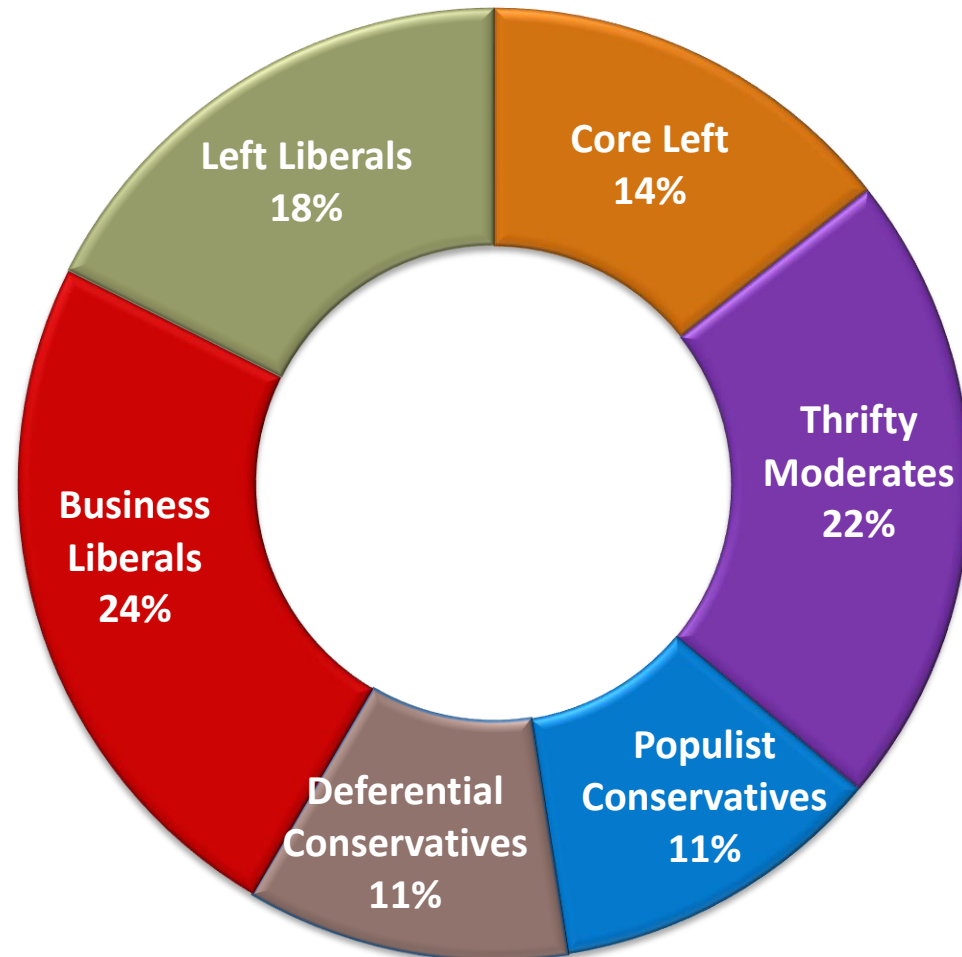
# Defining Value Clusters

| | | Core Left | Thrifty Moderates | Populist Conservatives | Deferential Conservatives | Business Liberals | Left Liberals |
|---|---|---|---|---|---|---|---|
| Is the main role of government to …? | Create equal opportunity | 0% | 32% | 98% | 74% | 64% | 97% |
| | Redistribute wealth | 94% | 34% | 0% | 20% | 25% | 0% |
| The profit system … | Brings out worst in human nature | 79% | 54% | 0% | 0% | 0% | 74% |
| | Teaches value of hard work and success | 0% | 10% | 84% | 89% | 88% | 0% |
| When gov'ts make decisions on spending on programs, do you think they should base their decisions on… | Ability to afford | 0% | 71% | 91% | 92% | 0% | 0% |
| | Public need | 93% | 0% | 0% | 0% | 96% | 91% |
| When it comes to government decision making… | Rely on common sense | 43% | 49% | 100% | 0% | 45% | 56% |
| | Listen to experts | 41% | 15% | 0% | 82% | 41% | 25% |

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# Value Cluster Tracking: The Liberals are up among the Core Left and Thrifty Moderates since September W1

## Core Left



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Liberal | 36% | 42% | 42% |
| NDP | 22% | 23% | 26% |
| Conservative | 17% | 16% | 11% |
| Green | 17% | 12% | 15% |
| Bloc | 6% | 6% | 4% |
| PPC | 3% | 2% | 2% |

## Left Liberals



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Liberal | 35% | 43% | 38% |
| Conservative | 27% | 28% | 23% |
| NDP | 18% | 13% | 17% |
| Green | 14% | 11% | 14% |
| PPC | 3% | 3% | 4% |
| Bloc | 3% | 2% | 4% |

## Thrifty Moderates



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Conservative | 31% | 36% | 31% |
| Liberal | 27% | 28% | 34% |
| NDP | 15% | 14% | 11% |
| Green | 14% | 10% | 12% |
| Bloc | 7% | 7% | 7% |
| PPC | 6% | 4% | 5% |

## Business Liberals



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Liberal | 44% | 40% | 43% |
| Conservative | 32% | 31% | 32% |
| NDP | 9% | 9% | 10% |
| Green | 8% | 10% | 6% |
| Bloc | 4% | 6% | 6% |
| PPC | 4% | 4% | 3% |

## Populist Conservatives



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Conservative | 62% | 58% | 65% |
| Liberal | 17% | 21% | 19% |
| NDP | 7% | 6% | 4% |
| Green | 5% | 7% | 3% |
| PPC | 5% | 7% | 4% |

## Deferential Conservatives



| | Sep '19 W1 | Sep '19 W2 | Oct '19 W3 |
|---|---|---|---|
| Conservative | 49% | 52% | 48% |
| Liberal | 25% | 26% | 26% |
| Green | 8% | 7% | 8% |
| Bloc | 7% | 6% | 7% |
| NDP | 7% | 5% | 6% |
| PPC | 5% | 1% | 4% |
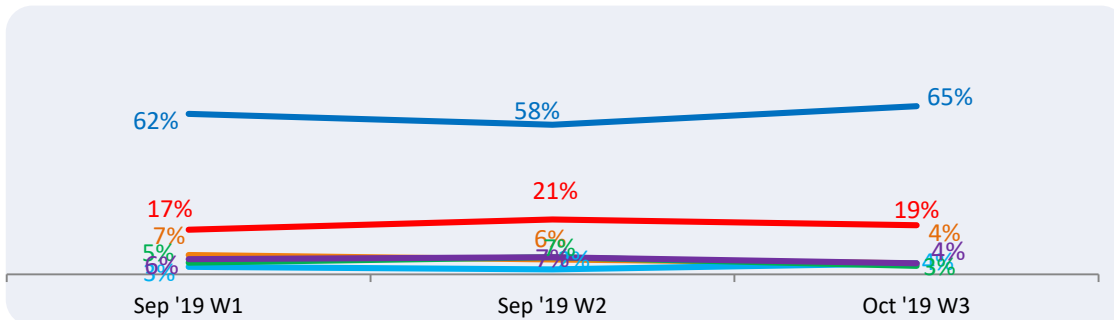
Note: Individual charts use different scales. Use caution when comparing across charts.

**Decided vote:** **Liberal** **Conservative** **NDP** **Green** **Bloc** **PPC**

# Leadership Attributes

# Leader Qualities Tracking: Leader attributes are largely stable over time for Scheer and Trudeau

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

[asked of all respondents; n=2,300]

**Cares about people like me**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 19% | 18% | 14% | 4% | 9% | 3% | 19% | 13% |
| W2 | 19% | 19% | 12% | 3% | 9% | 3% | 21% | 15% |
| W1 | 21% | 17% | 9% | 3% | 10% | 3% | 22% | 14% |

**Competent**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 23% | 20% | 10% | 4% | 7% | 3% | 22% | 11% |
| W2 | 21% | 21% | 8% | 3% | 7% | 3% | 25% | 12% |
| W1 | 22% | 20% | 8% | 3% | 8% | 4% | 24% | 11% |

**Honest**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 14% | 15% | 14% | 4% | 12% | 3% | 20% | 18% |
| W2 | 12% | 16% | 11% | 3% | 11% | 3% | 24% | 19% |
| W1 | 14% | 15% | 8% | 3% | 13% | 4% | 23% | 20% |

**Will make a positive difference for people like me**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 22% | 20% | 12% | 4% | 8% | 2% | 20% | 12% |
| W2 | 21% | 22% | 10% | 3% | 7% | 3% | 23% | 12% |
| W1 | 21% | 21% | 9% | 3% | 9% | 4% | 23% | 11% |

Legend: Justin Trudeau, Andrew Scheer, Jagmeet Singh, Yves-Francois Blanchet, Elizabeth May, Maxime Bernier, Undecided, None

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# Leader Qualities Tracking in Quebec: In Quebec, both Blanchet and Singh have made gains

**Q** Now we would like to read you a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it BEST describes… **[QUEBEC]**
[asked of all respondents; n=537]

**Cares about people like me**

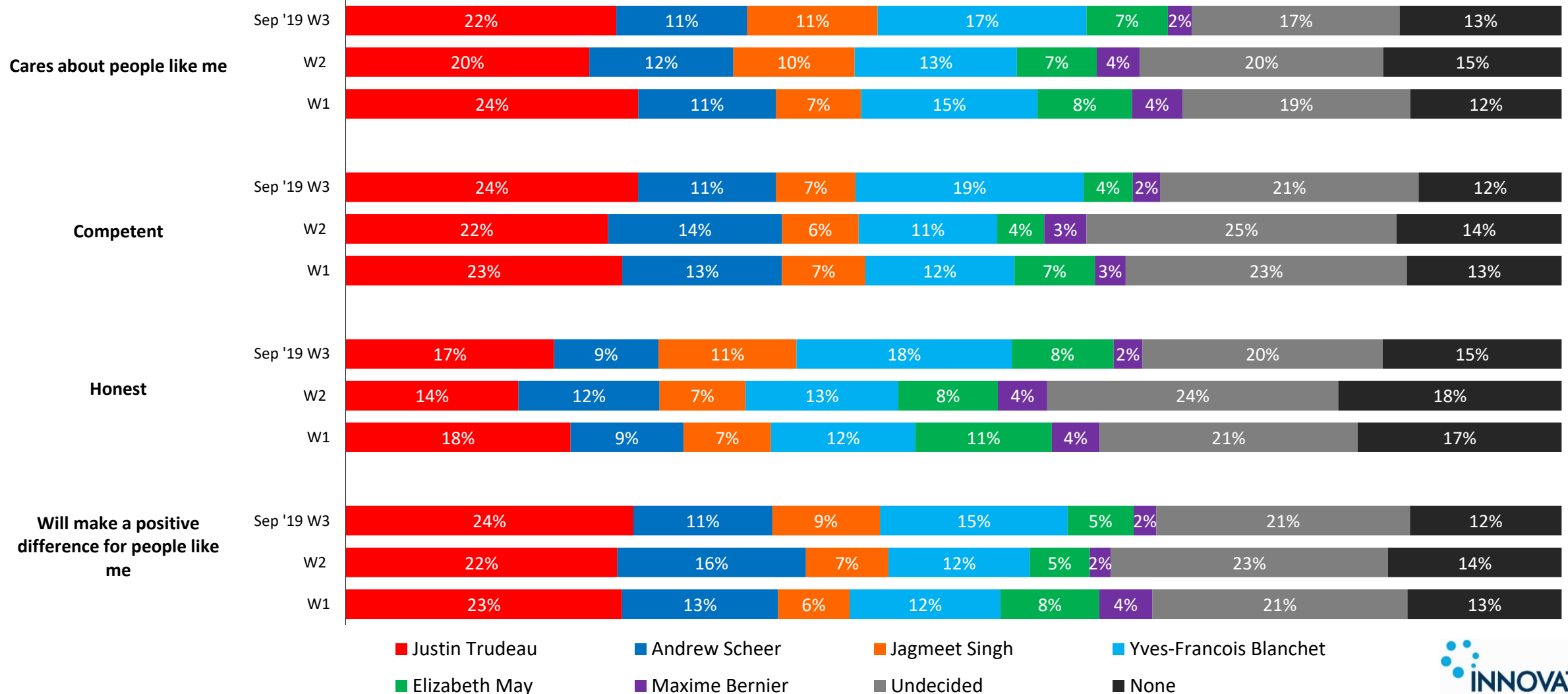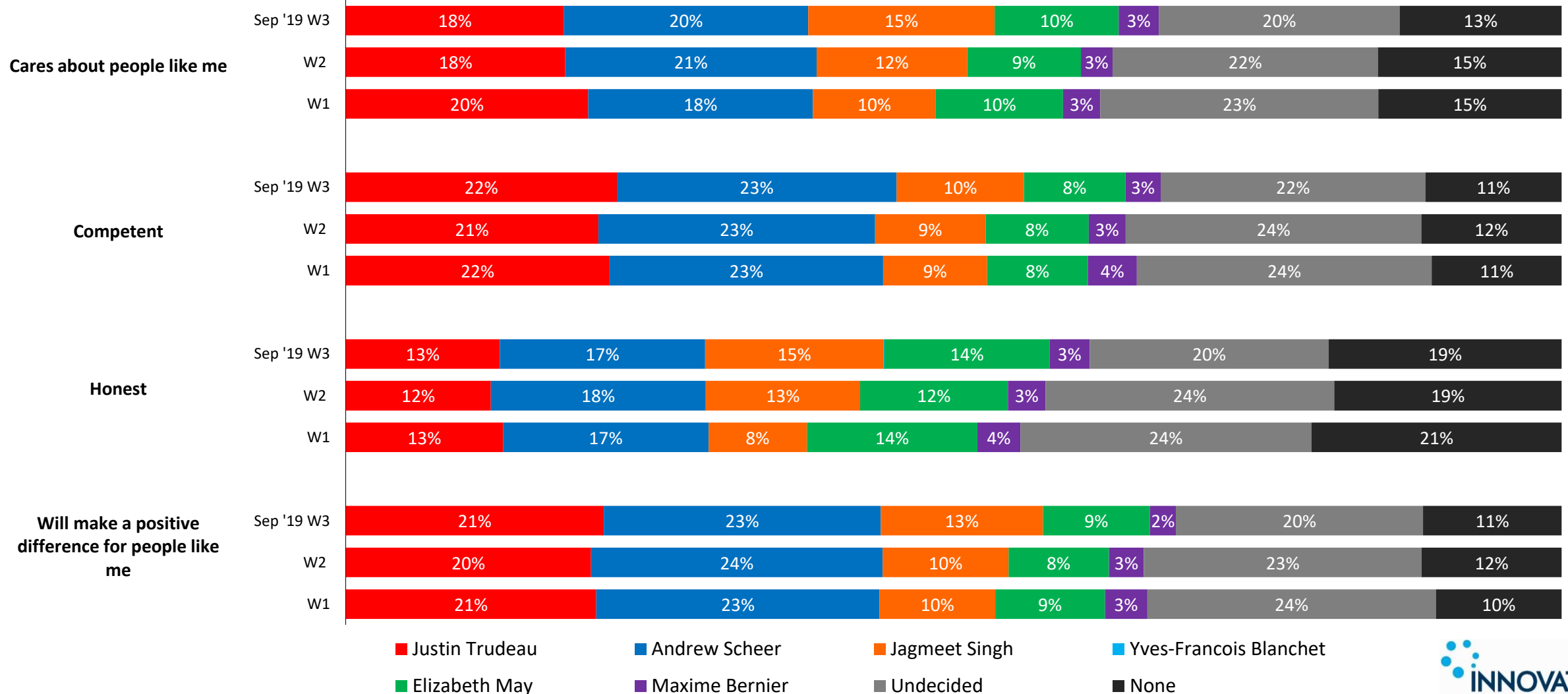| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 22% | 11% | 11% | 17% | 7% | 2% | 17% | 13% |
| W2 | 20% | 12% | 10% | 13% | 7% | 4% | 20% | 15% |
| W1 | 24% | 11% | 7% | 15% | 8% | 4% | 19% | 12% |

**Competent**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 24% | 11% | 7% | 19% | 4% | 2% | 21% | 12% |
| W2 | 22% | 14% | 6% | 11% | 4% | 3% | 25% | 14% |
| W1 | 23% | 13% | 7% | 12% | 7% | 3% | 23% | 13% |

**Honest**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 17% | 9% | 11% | 18% | 8% | 2% | 20% | 15% |
| W2 | 14% | 12% | 7% | 13% | 8% | 4% | 24% | 18% |
| W1 | 18% | 9% | 7% | 12% | 11% | 4% | 21% | 17% |

**Will make a positive difference for people like me**

| | Trudeau | Scheer | Singh | Blanchet | May | Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 24% | 11% | 9% | 15% | 5% | 2% | 21% | 12% |
| W2 | 22% | 16% | 7% | 12% | 5% | 2% | 23% | 14% |
| W1 | 23% | 13% | 6% | 12% | 8% | 4% | 21% | 13% |

Legend: ■ Justin Trudeau ■ Andrew Scheer ■ Jagmeet Singh ■ Yves-Francois Blanchet ■ Elizabeth May ■ Maxime Bernier ■ Undecided ■ None

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# Leader Qualities Tracking in the Rest of Canada: Outside Quebec, only Singh has managed to move the needle

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

[asked of all respondents; n=1,763]

**Cares about people like me**

| | Justin Trudeau | Andrew Scheer | Jagmeet Singh | Elizabeth May | Maxime Bernier | Undecided | None |
|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 18% | 20% | 15% | 10% | 3% | 20% | 13% |
| W2 | 18% | 21% | 12% | 9% | 3% | 22% | 15% |
| W1 | 20% | 18% | 10% | 10% | 3% | 23% | 15% |

**Competent**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 22% | 23% | 10% | 8% | 3% | 22% | 11% |
| W2 | 21% | 23% | 9% | 8% | 3% | 24% | 12% |
| W1 | 22% | 23% | 9% | 8% | 4% | 24% | 11% |

**Honest**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 13% | 17% | 15% | 14% | 3% | 20% | 19% |
| W2 | 12% | 18% | 13% | 12% | 3% | 24% | 19% |
| W1 | 13% | 17% | 8% | 14% | 4% | 24% | 21% |

**Will make a positive difference for people like me**

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Sep '19 W3 | 21% | 23% | 13% | 9% | 2% | 20% | 11% |
| W2 | 20% | 24% | 10% | 8% | 3% | 23% | 12% |
| W1 | 21% | 23% | 10% | 9% | 3% | 24% | 10% |

Legend:
- Justin Trudeau
- Andrew Scheer
- Jagmeet Singh
- Yves-Francois Blanchet
- Elizabeth May
- Maxime Bernier
- Undecided
- None

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# Tracking Methodology

# *Wave 1 Methodology*

**These are the results of an online survey conducted between August 30th and September 5th, 2019.**

This online survey of 3,236 adult Canadians was conducted using Dynata, a leading provider of online samples. The results are weighted to n=2,500 based on Census data from Statistics Canada.

Respondents from the Dynata 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. 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** | 269 | 8.3% | 341 | 13.7% |
| **Males 35-54** | 510 | 15.8% | 418 | 16.7% |
| **Males 55+** | 681 | 21.1% | 452 | 18.1% |
| **Females 18-34** | 437 | 13.5% | 340 | 13.6% |
| **Females 35-54** | 593 | 18.4% | 434 | 17.4% |
| **Females 55+** | 741 | 22.9% | 511 | 20.5% |
| | | | | |
| **BC** | 393 | 12.1% | 341 | 13.6% |
| **Alberta** | 277 | 8.6% | 285 | 11.4% |
| **Prairies** | 164 | 5.1% | 167 | 6.7% |
| **Ontario** | 1245 | 38.5% | 953 | 38.1% |
| **Quebec** | 980 | 30.3% | 586 | 23.4% |
| **Atlantic** | 177 | 5.5% | 168 | 6.7% |

# *Wave 2 Methodology*

**These are the results of an online survey conducted between September 17<sup>th</sup> and September 25<sup>th</sup>, 2019.**

This online survey of 2,496 adult Canadians was conducted using Dynata, a leading provider of online samples. The results are weighted to n=2,300 based on Census data from Statistics Canada.

Respondents from the Dynata 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. 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** | 317 | 12.7% | 316 | 13.8% |
| **Males 35-54** | 428 | 17.2% | 384 | 16.7% |
| **Males 55+** | 434 | 17.4% | 416 | 18.1% |
| **Females 18-34** | 344 | 13.8% | 313 | 13.6% |
| **Females 35-54** | 464 | 18.6% | 399 | 17.4% |
| **Females 55+** | 506 | 20.3% | 469 | 20.4% |
| | | | | |
| **BC** | 326 | 13.1% | 314 | 13.7% |
| **Alberta** | 263 | 10.5% | 262 | 11.4% |
| **Prairies** | 157 | 6.3% | 153 | 6.7% |
| **Ontario** | 889 | 35.6% | 877 | 38.2% |
| **Quebec** | 710 | 28.4% | 537 | 23.4% |
| **Atlantic** | 151 | 6.0% | 156 | 6.8% |

# Building Understanding.

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