

2019 Election Political Landscape



October 15th – 17th 2019

Methodology



These are the results of an online survey conducted between October 15th to 17th, 2019.

This online survey of 3,094 adult Canadians was conducted using Lucid, a leading provider of online sample. The results are weighted to n=3,000 based on Census data from Statistics Canada.

Respondents from 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.

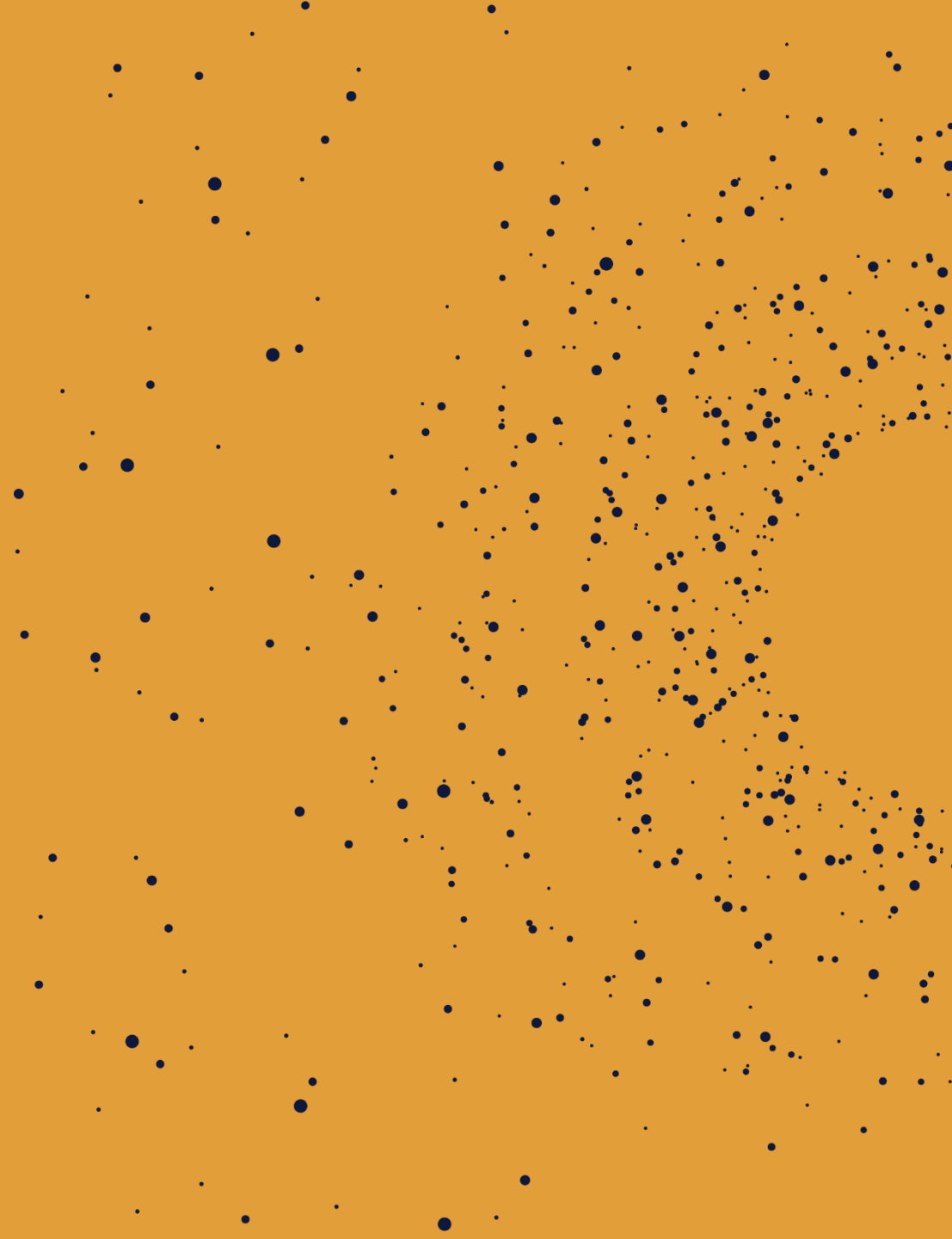
A total of 651 panelists started but did not finish the survey and an additional 731 panelists were screened out for exceeding age/gender/region quotas.

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 sample. Weighted and unweighted frequencies are reported in the table.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	329	10.6%	413	13.8%
Males 35-54	473	15.3%	501	16.7%
Males 55+	556	18.0%	543	18.1%
Females 18-34	472	15.3%	408	13.6%
Females 35-54	596	19.3%	521	17.4%
Females 55+	668	21.6%	613	20.4%
BC	490	15.8%	408	13.6%
Alberta	405	13.1%	340	11.3%
Prairies	231	7.5%	200	6.7%
Ontario	1,029	33.3%	1,146	38.2%
Quebec	699	22.6%	701	23.4%
Atlantic	240	7.8%	204	6.8%

Federal Vote

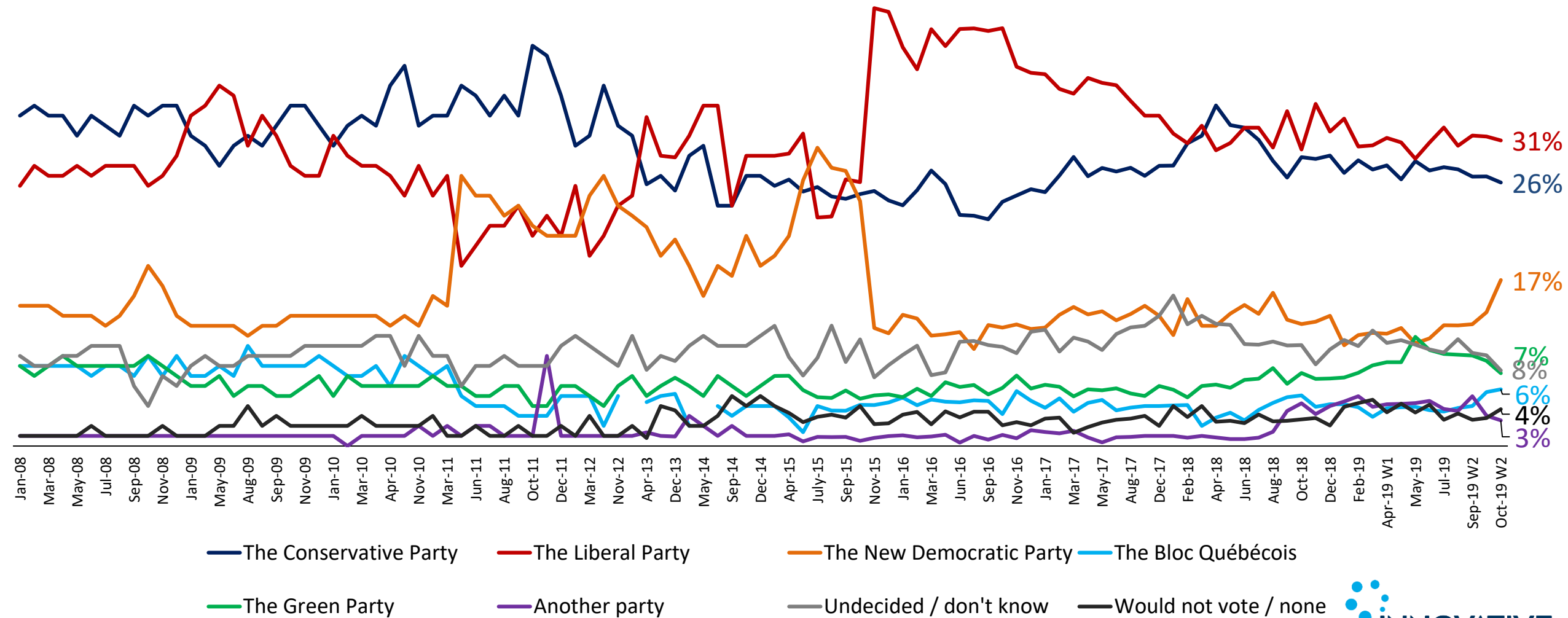


Combined Federal Vote: Liberals (31%) and Conservatives (26%) steady since early September



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; n=3,000]



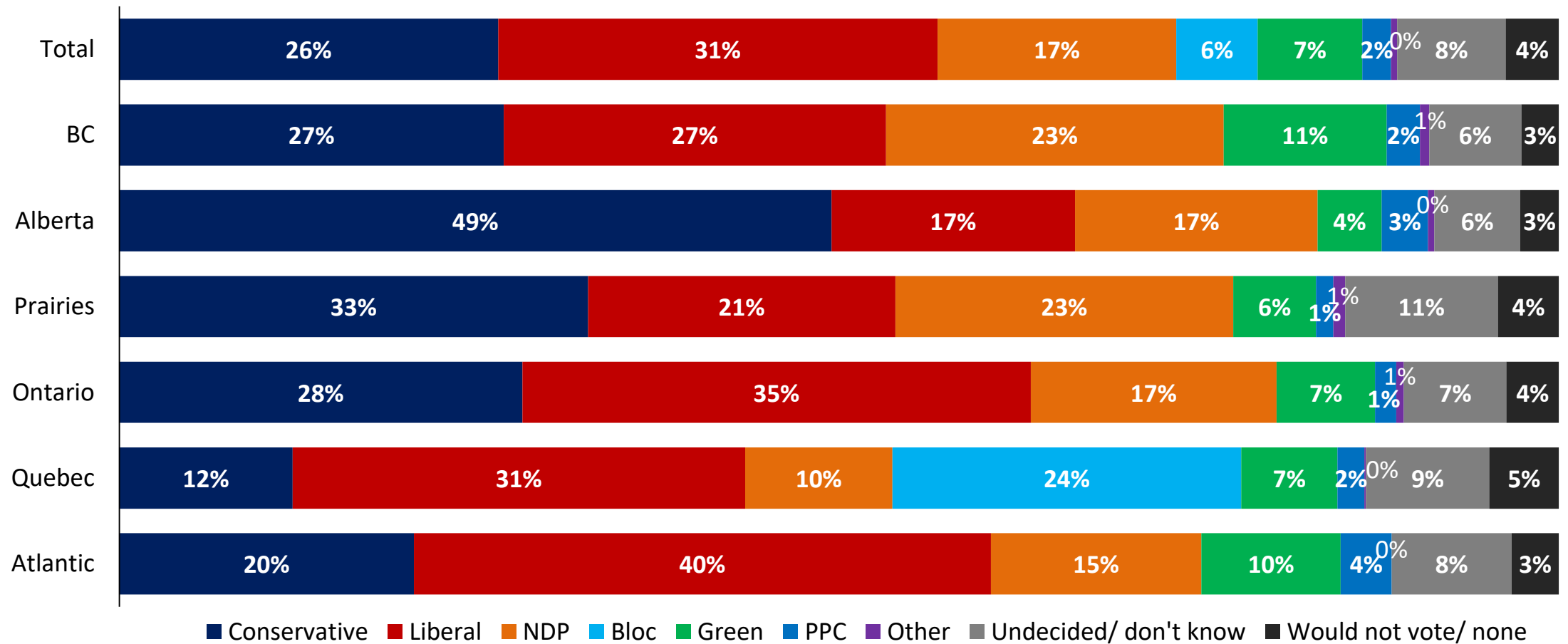
Note: People's Party of Canada has been added since September 2018, included in 'Another party'.

Combined Federal Vote by Region: Liberals lead in Ontario, Quebec, and Atlantic while the CPC is ahead in Alberta and the Prairies



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

[asked of all respondents; n=3,000]

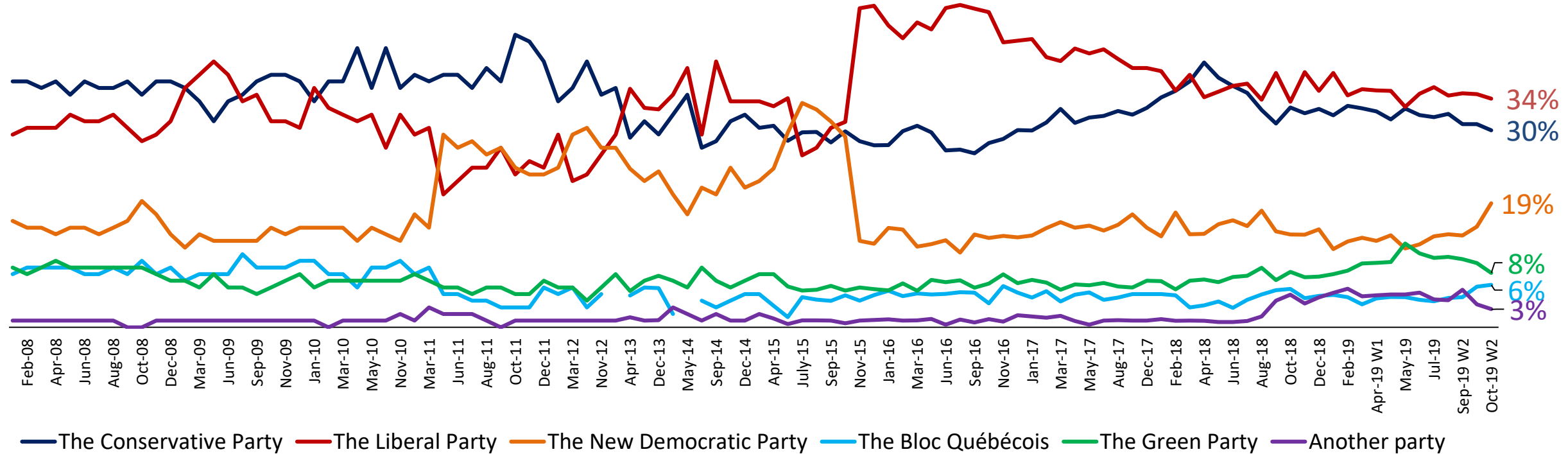


Decided Federal Vote: The Liberals are steady since early September, maintain a four point lead over the Conservatives



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; n=2,663]

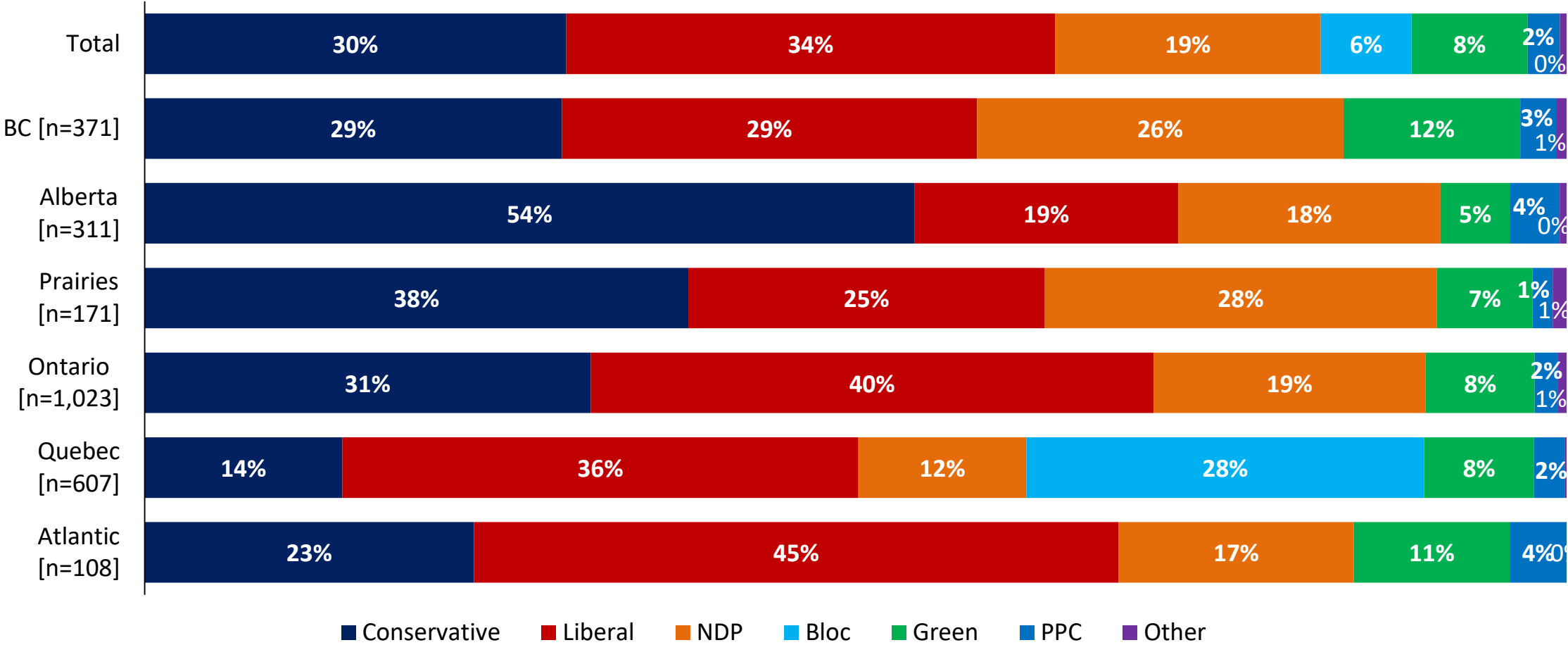


Note: People's Party of Canada has been added since September 2018, included in 'Another party'.

Decided Federal Vote by Region: The Liberals hold substantial leads in Ontario and Quebec, while the CPC leads in Alberta and the Prairies



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED]
[showing only decided voters; n=2, 663]

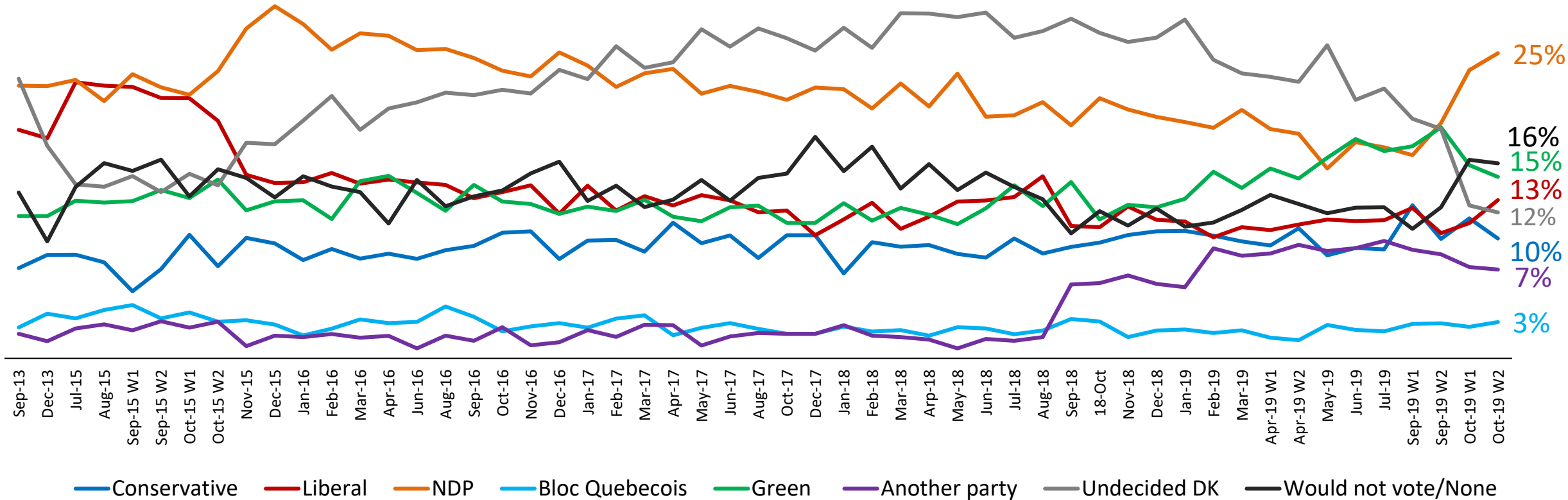


Second Choice: NDP continues to gain to 25% for second choice, Greens drop to 15%; Undecided down to 12%



And which party would be your second choice?

[asked only of respondents who had a first choice, n=2,663]



2nd Choice by 1st Choice: 42% of Liberal voters say the NDP is their second choice, while another 15% say the Green Party is theirs

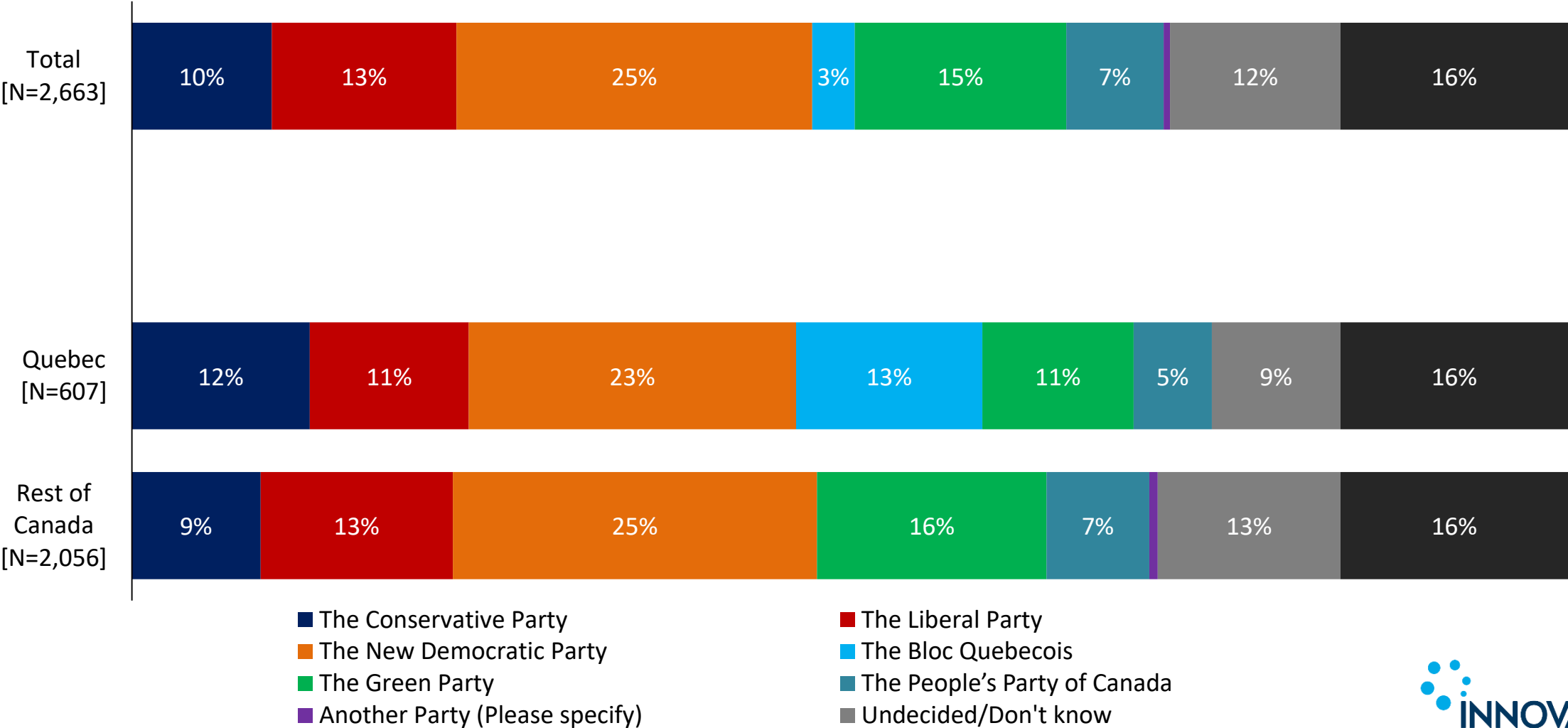
Q And which party would be your second choice? **BY** Combined Vote

		Combined Vote					
2 nd Choice		Conservative	Liberal	NDP	Bloc [QC Only]	Green	PPC/Other
	Conservative	n/a	13%	13%	21%	10%	30%
	Liberal	13%	n/a	34%	13%	20%	8%
	NDP	19%	42%	n/a	28%	30%	12%
	Bloc [QC Only]	2%	4%	3%	n/a	6%	4%
	Green	10%	15%	30%	13%	n/a	7%
	People’s Party	15%	2%	3%	4%	10%	0%
	Other	0%	0%	0%	0%	1%	8%
	Undecided/ don’t know	15%	10%	11%	7%	14%	15%
	Would not vote/ none	25%	15%	7%	13%	9%	16%

Second Choice: NDP leads on second choice in both Quebec and the rest of Canada

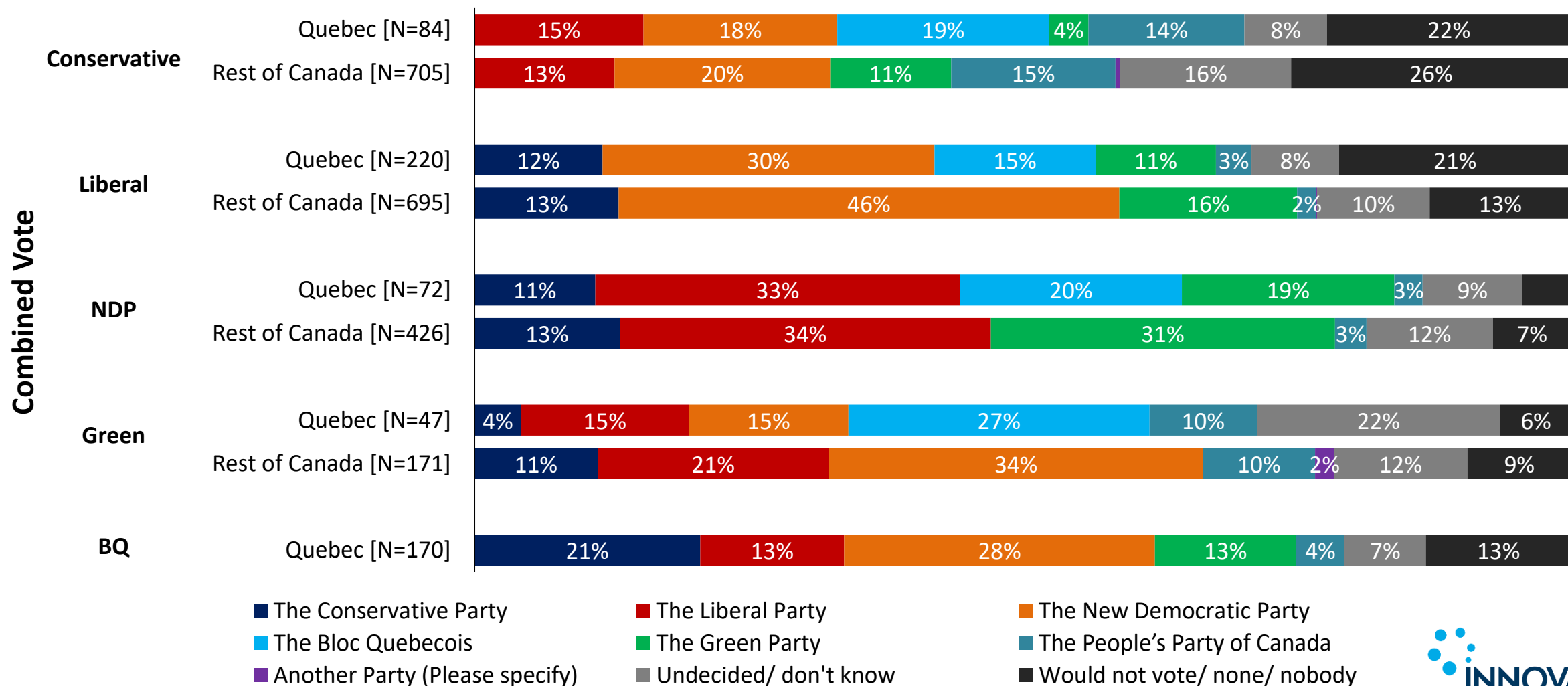


And which party would be your second choice?
[asked only of respondents who had a first choice]

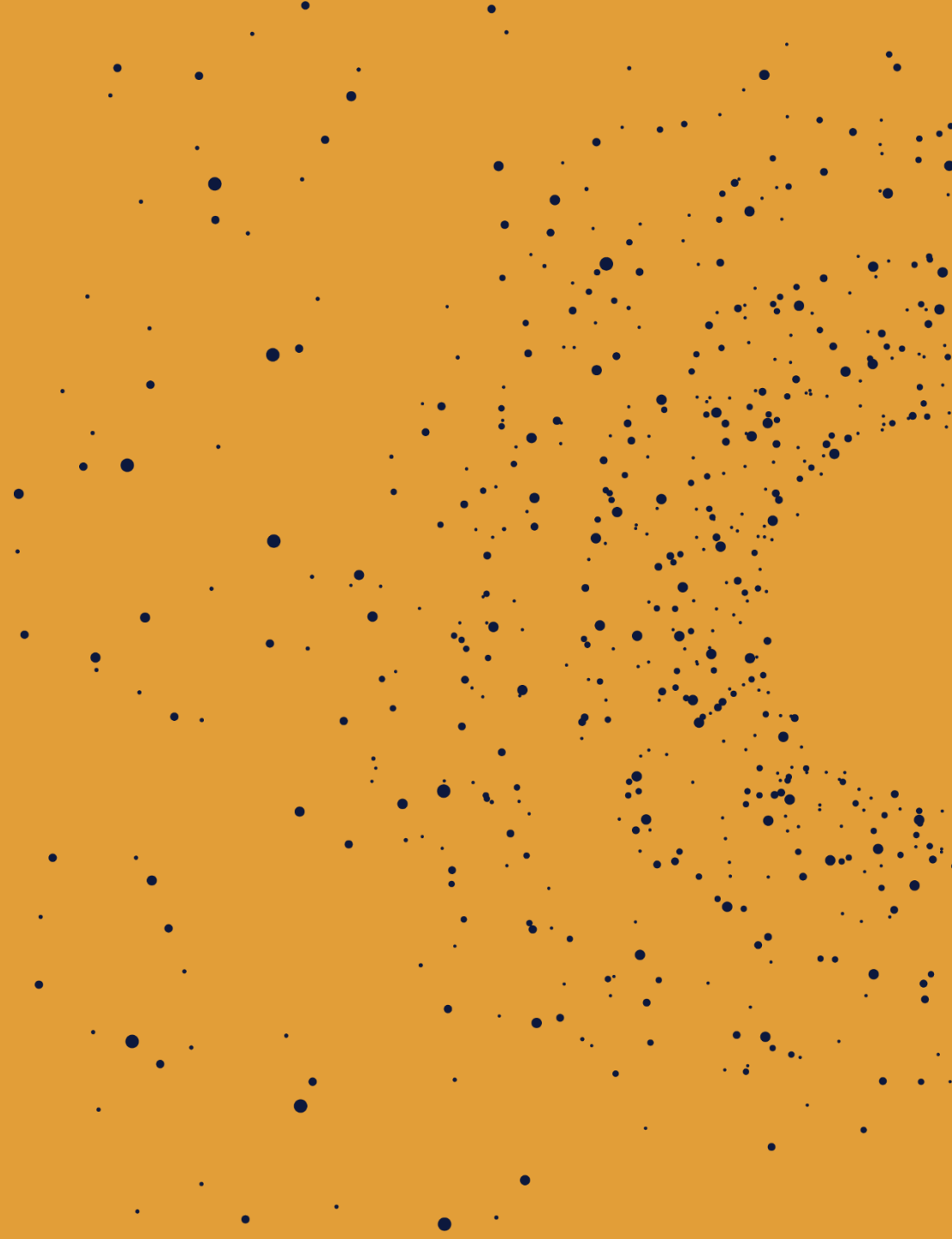


2nd Choice by 1st Choice: Outside of Quebec, the NDP are the clear top 2nd choice among Green and Liberal Voters ¹¹

Q And which party would be your second choice? **BY** Combined Vote
[asked only of respondents who had a first choice]



Party ID



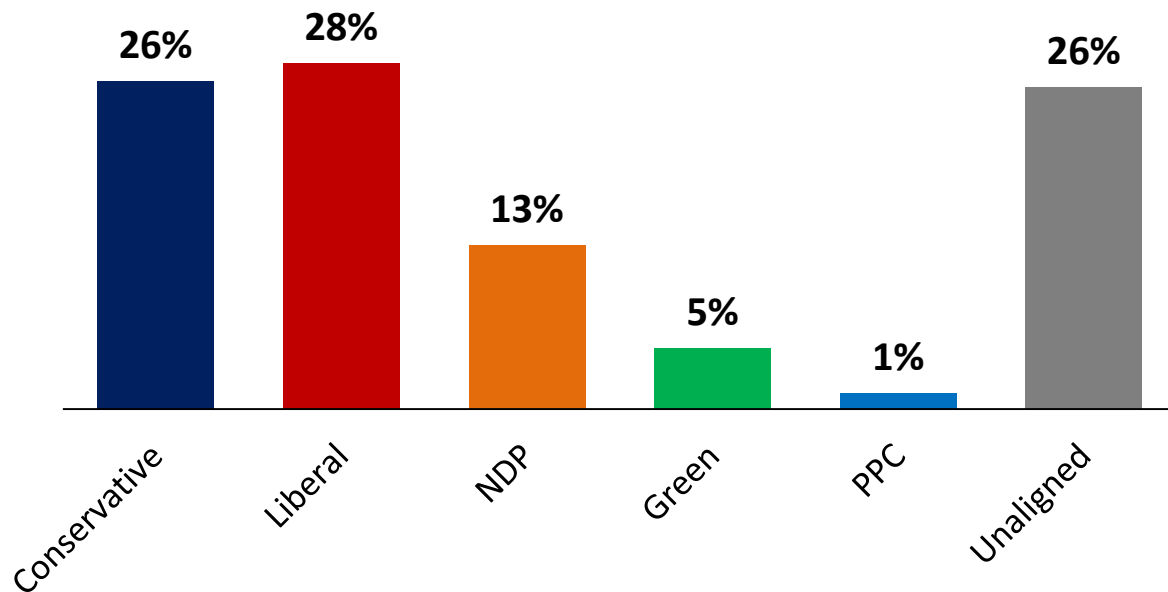
Federal Party ID: The Liberals and Conservatives are similar on ID outside of Quebec, but in Quebec the Liberals have a wide lead



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

[asked of all respondents; n=3,000]

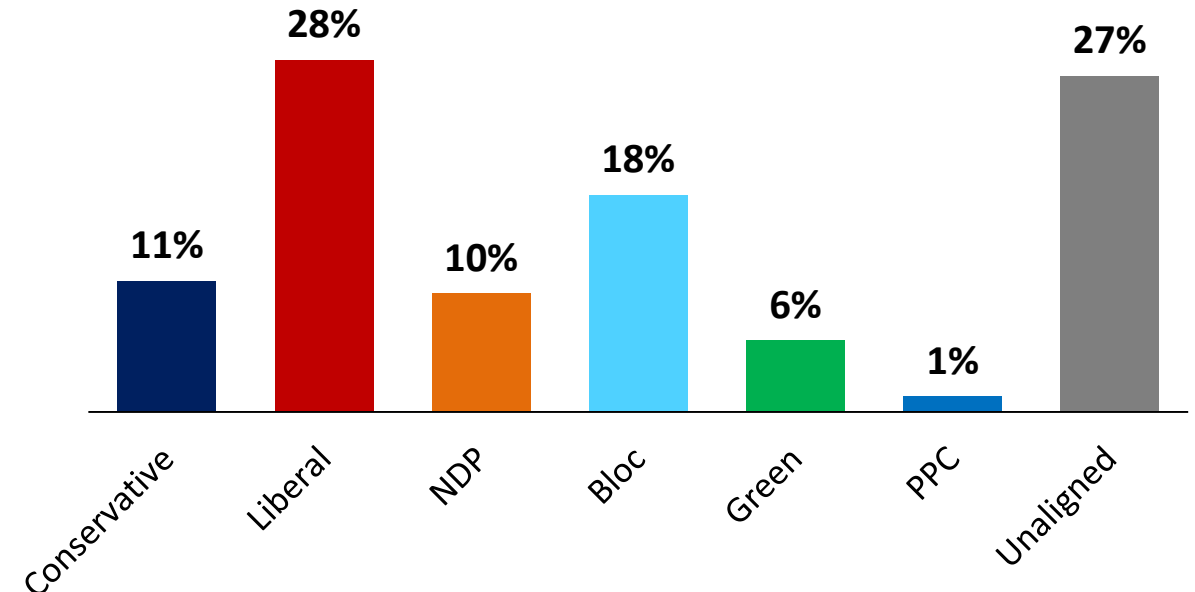
Rest of Canada



n=2,299

Note: Other (<1%) not shown.

Quebec



n=701

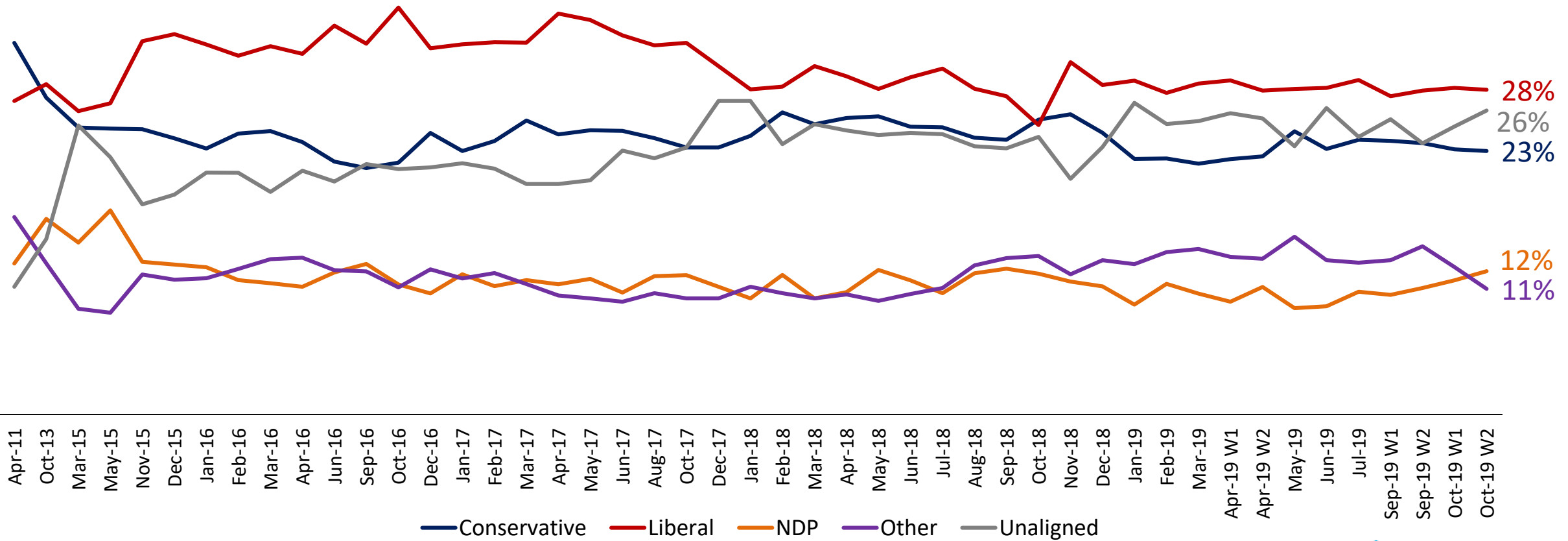
Note: Other (<1%) not shown.

Federal Party ID: The Liberals (28%) lead on ID over the Conservatives (23%); 26% are unaligned



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

[asked of all respondents; n=3,000]



Vote by Party ID: 86% of Conservative partisans say they would vote CPC, while 83% of Liberals say they would vote for the LPC

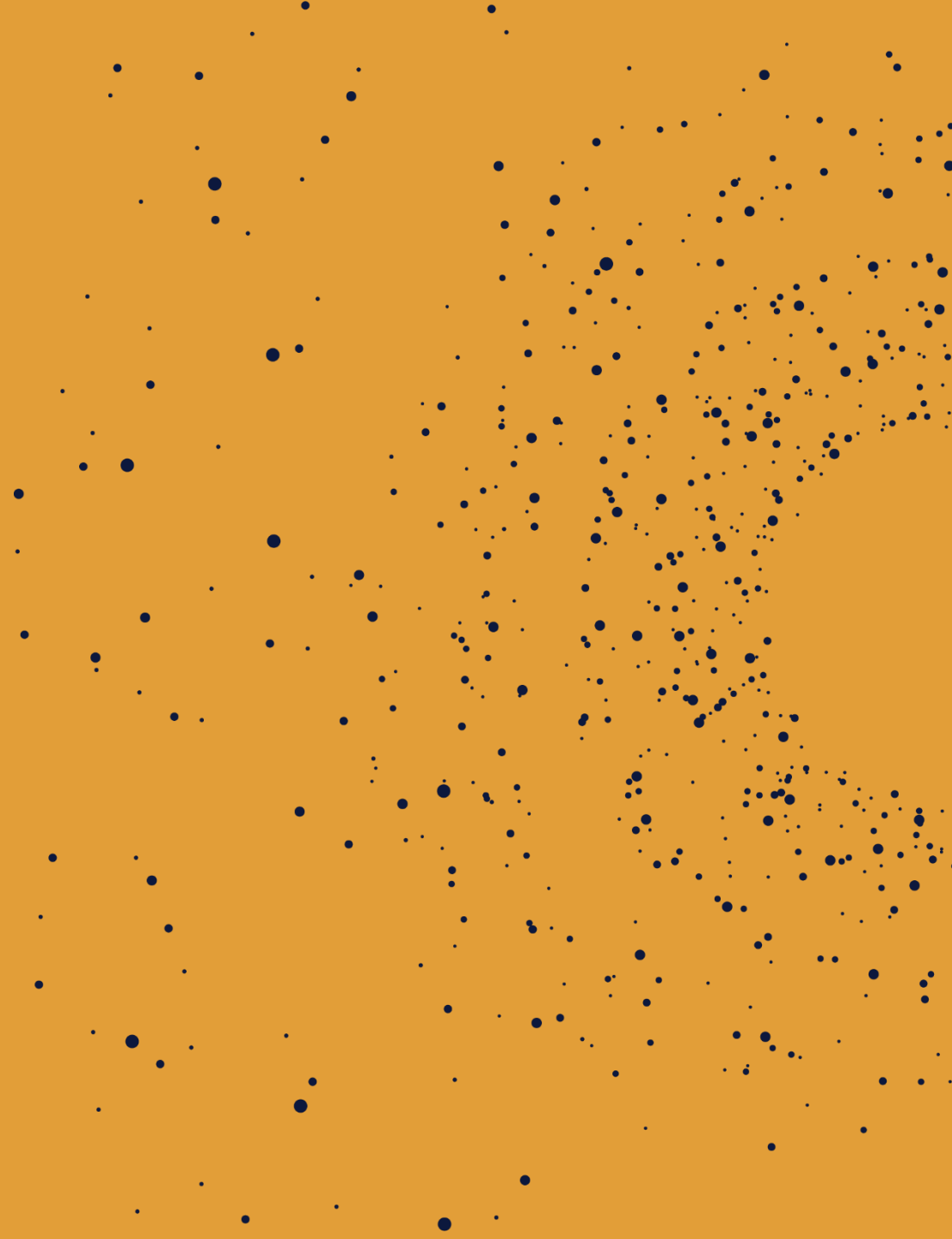


Combined Vote BY Thinking about politics in Canada, generally speaking, do you think of yourself as a...

[asked of all respondents; n=3,000]

Combined Vote	Party ID							
		Conservative	Liberal	NDP	Bloc [QC Only]	Green	PPC/Other	Unaligned
	Conservative	86%	4%	4%	2%	4%	7%	18%
	Liberal	4%	83%	12%	2%	8%	8%	17%
	NDP	3%	8%	75%	1%	4%	6%	14%
	Bloc	2%	1%	2%	88%	2%	6%	4%
	Green	1%	3%	5%	2%	78%	8%	5%
	People's Party	2%	0%	1%	1%	1%	46%	2%
	Other	0%	0%	0%	0%	0%	6%	1%
	Undecided/ don't know	1%	1%	0%	2%	1%	10%	25%
	Would not vote/ none	0%	0%	1%	1%	2%	2%	13%

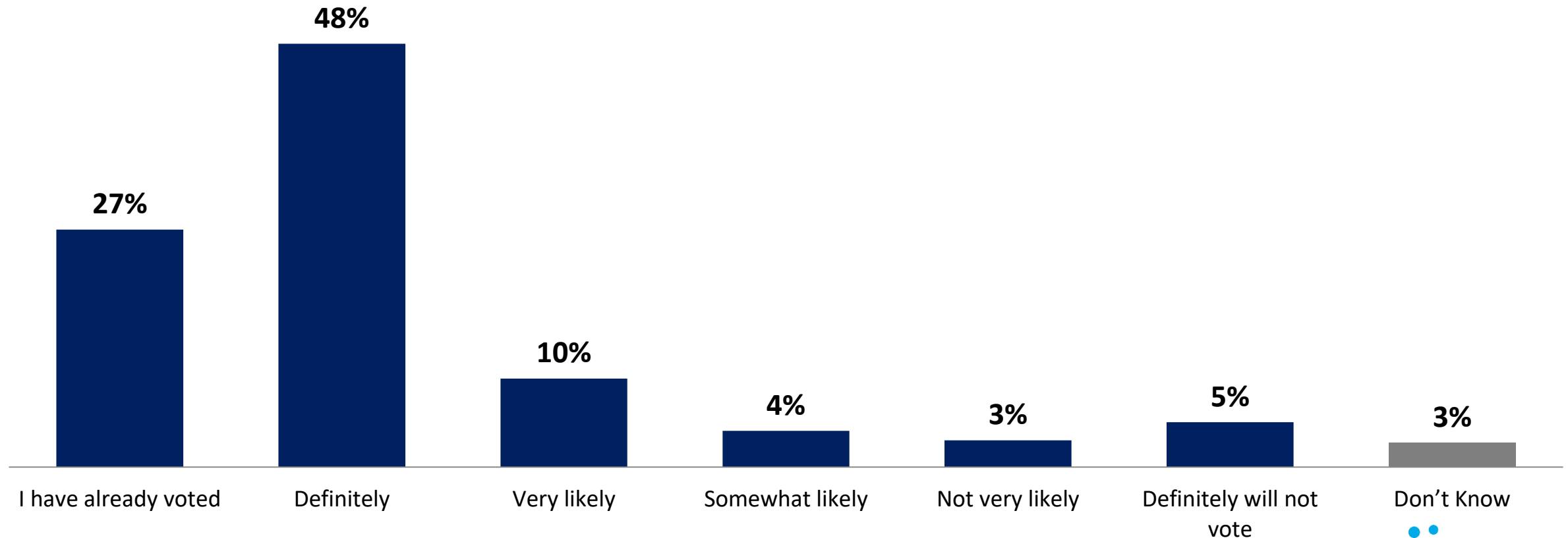
Turnout



Likelihood to Vote: One-in-four say they have already voted (27%), while another 48% say they definitely will



As you may have heard there is going to be a federal election on October 21st of this year. How likely are you to vote in the upcoming Canadian federal election? [asked of all respondents; n=3,000]

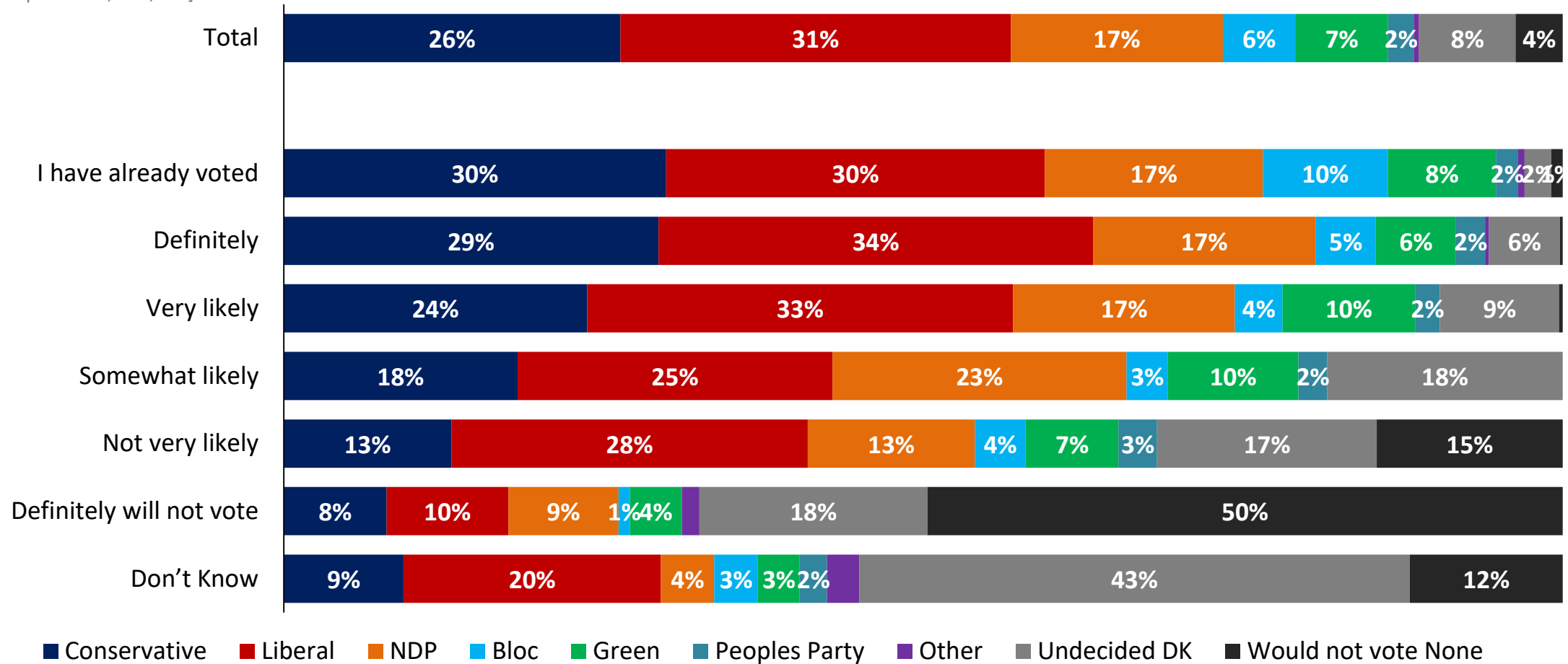


Combined Vote by Likelihood to Vote: Race is a dead heat among those who have already voted, but the Liberals have an edge

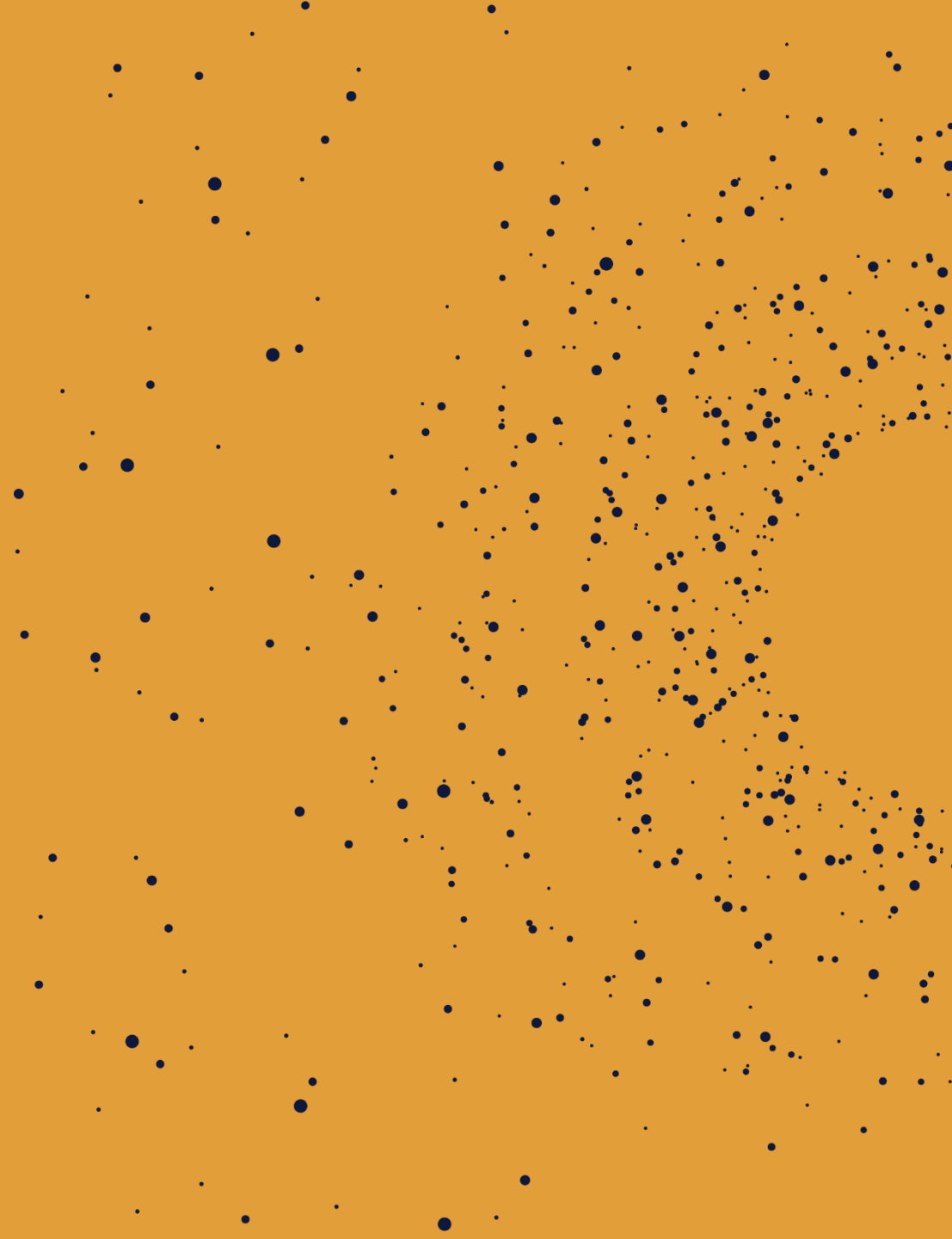


Combined vote by: As you may have heard there is going to be a federal election on October 21st of this year. How likely are you to vote in the upcoming Canadian federal election?

[asked of all respondents; n=3,000]



Satisficing

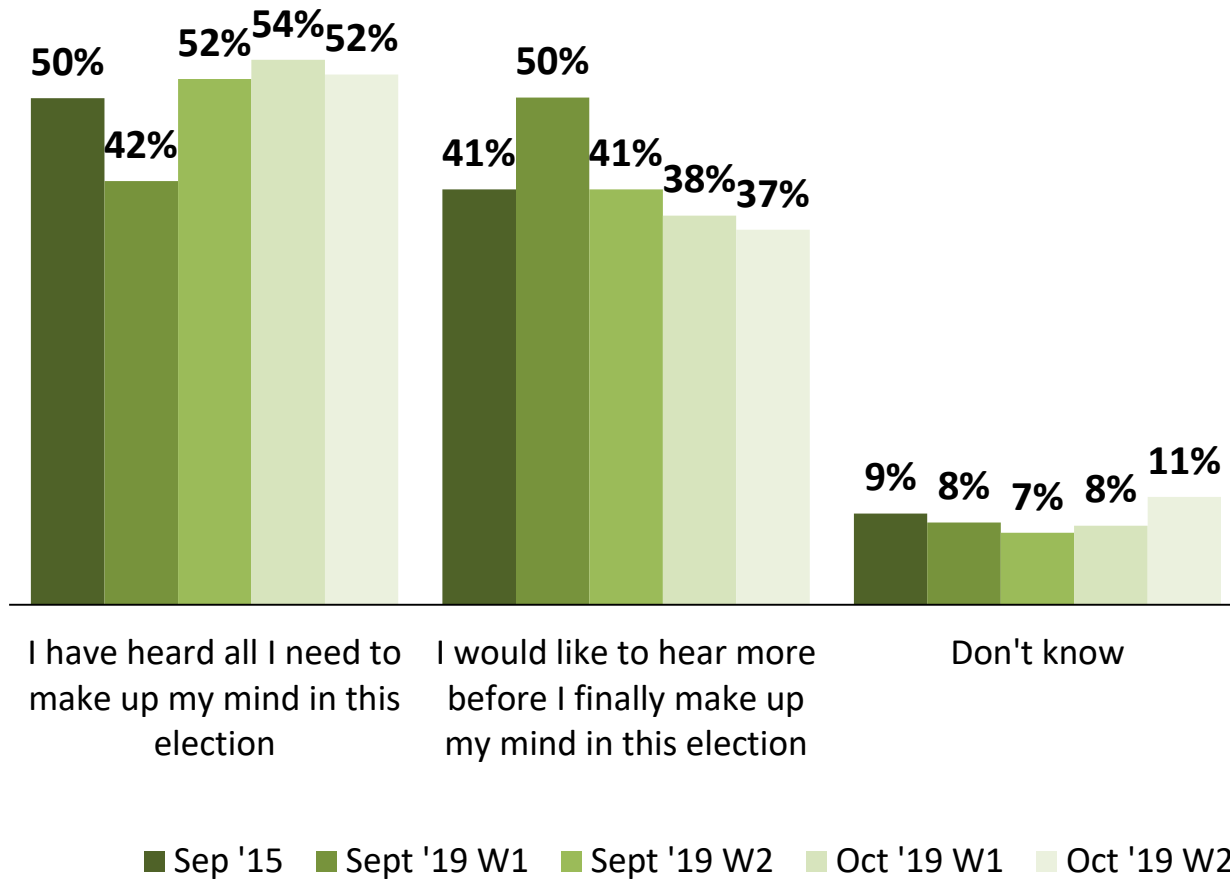


Made up Mind: A majority have now made up their minds in the federal election

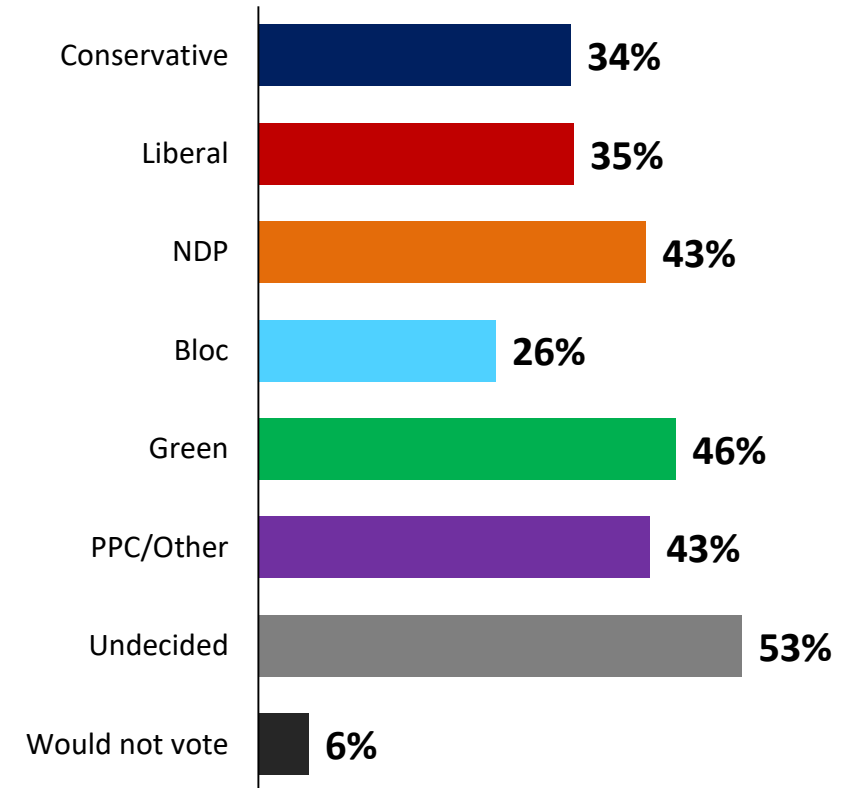


Which statement is closest to your view about the upcoming federal election?

[Asked of respondents who have not voted yet; n=2,192; in tracking asked of all respondents]



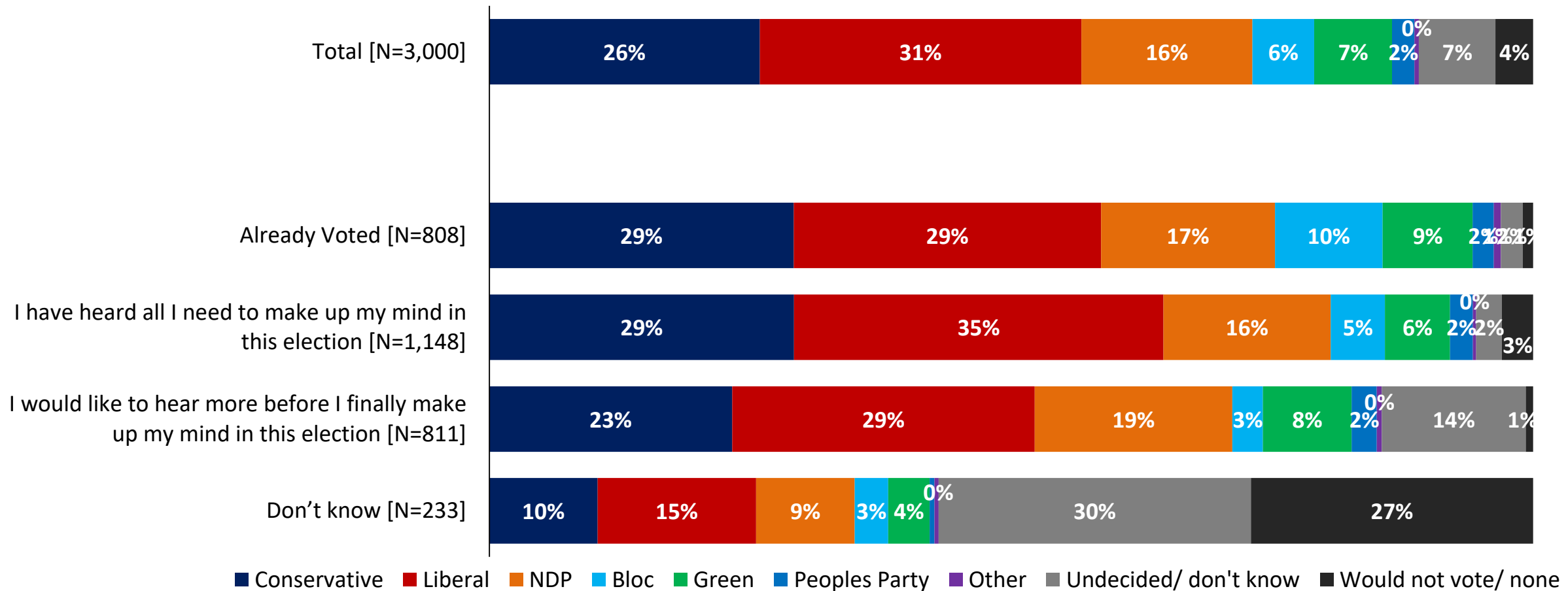
% Would like to hear more By current combined vote choice



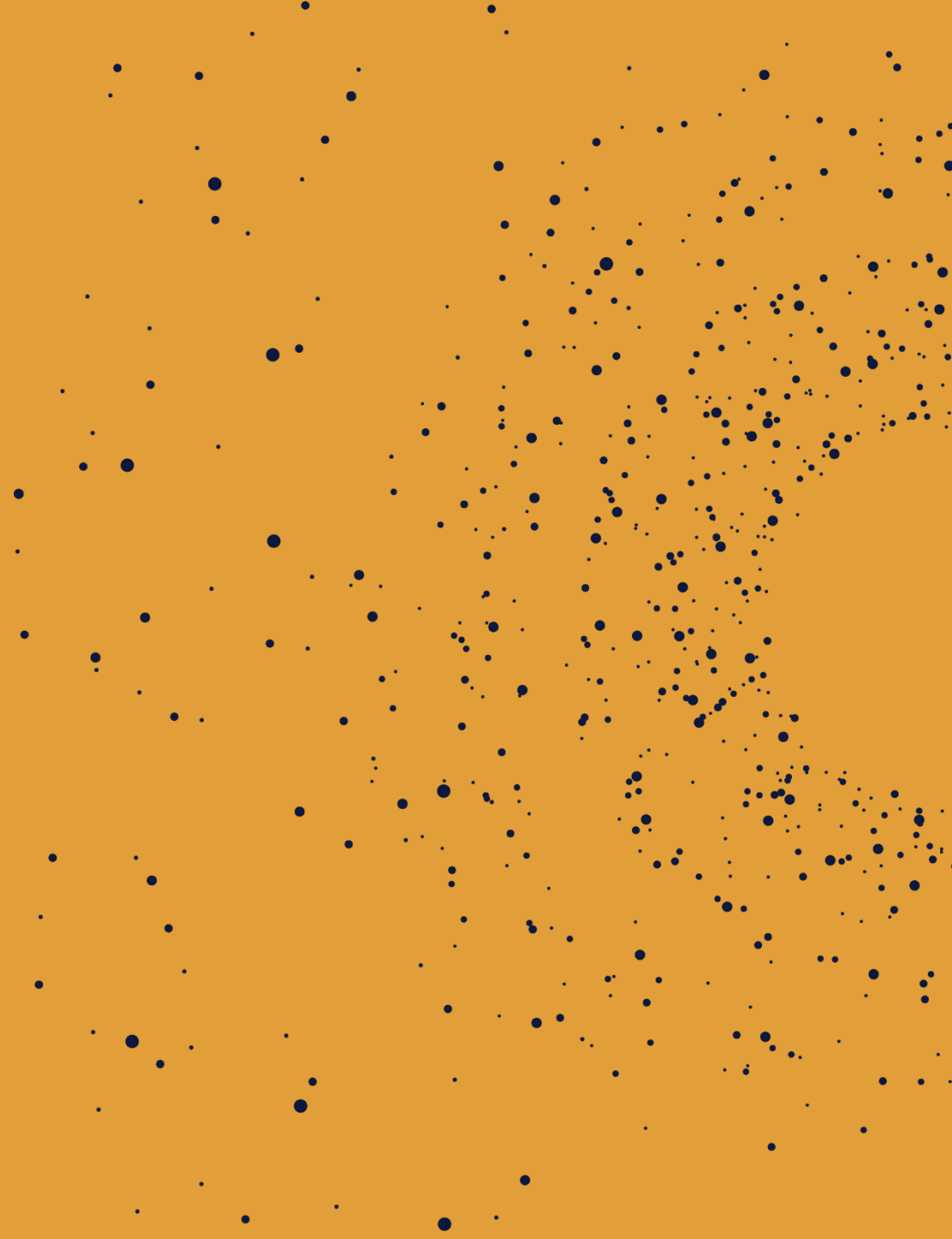
Combined Vote by Certainty: The LPC (35%) are slightly ahead of the Conservatives (29%) among firm voters who have yet to vote



Combined vote by: Which statement is closest to your view about the upcoming federal election?

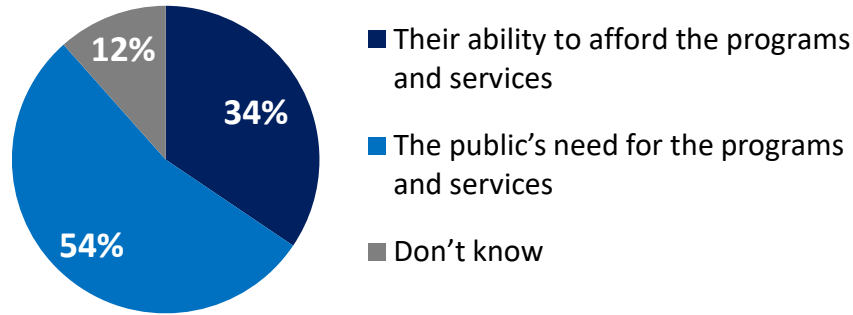


2015 Value Clusters: Where are we now?

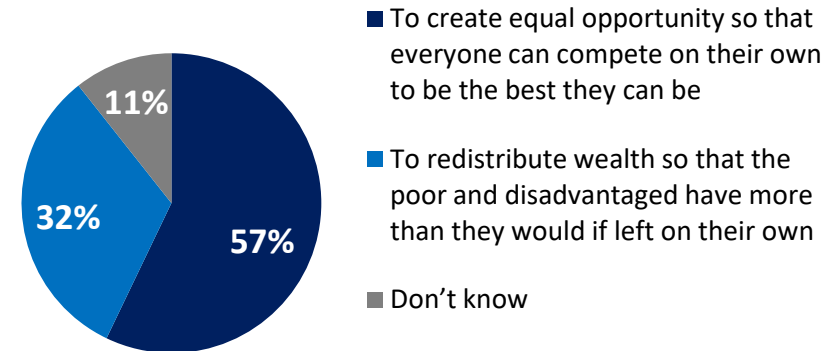


Core Political Values: Tracked since the 2015 federal election

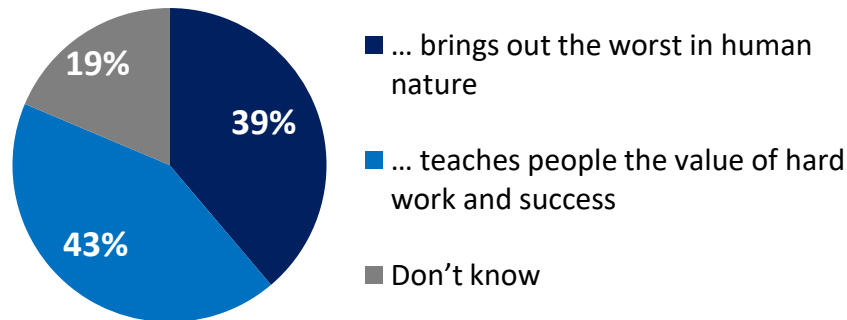
Q When governments make major decisions concerning spending on programs and services, do you think they should be based on ...?



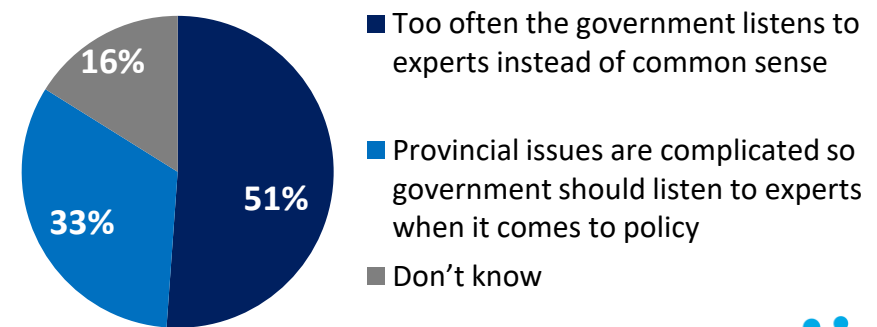
Q Is the main role of government ...?



Q Which one of the following statements comes closest to your view? The profit system ...



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



Note: Showing October 2019 Wave 2 results.

Value Clusters: Respondents are clustered into groups based on their answers to the core value questions

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.

[asked of all respondents; n=3,000]



Note: Showing October 2019 Wave 2 results.

Defining Value Clusters

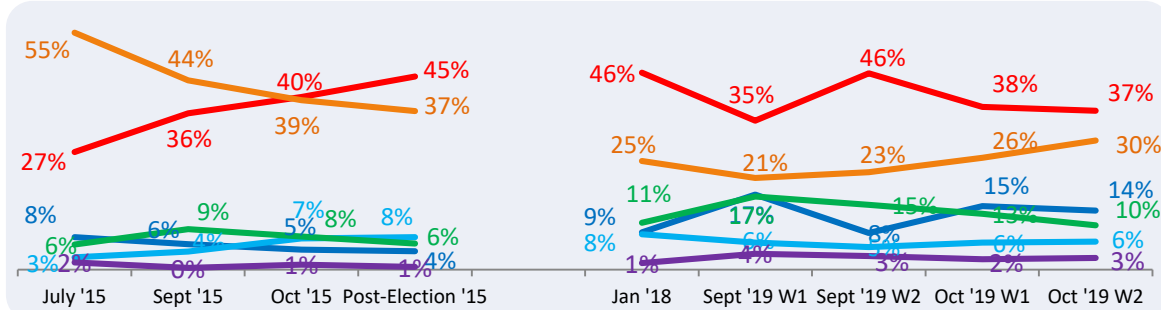
Core Political Values by Value Clusters

Column %		Core Left	Thrifty Moderates	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals
Is the main role of government to ...?	Create equal opportunity	0%	32%	99%	76%	65%	97%
	Redistribute wealth	96%	34%	0%	21%	28%	0%
The profit system ...	Brings out worst in human nature	82%	52%	0%	0%	0%	81%
	Teaches value of hard work and success	0%	11%	88%	91%	91%	0%
When gov'ts make decisions on spending on programs/services, do you think they should base their decisions on...	Ability to afford	0%	70%	94%	92%	0%	0%
	Public need	93%	0%	0%	0%	96%	92%
When it comes to government decision making...	Rely on common sense	50%	50%	100%	0%	48%	59%
	Listen to experts	39%	15%	0%	87%	41%	26%

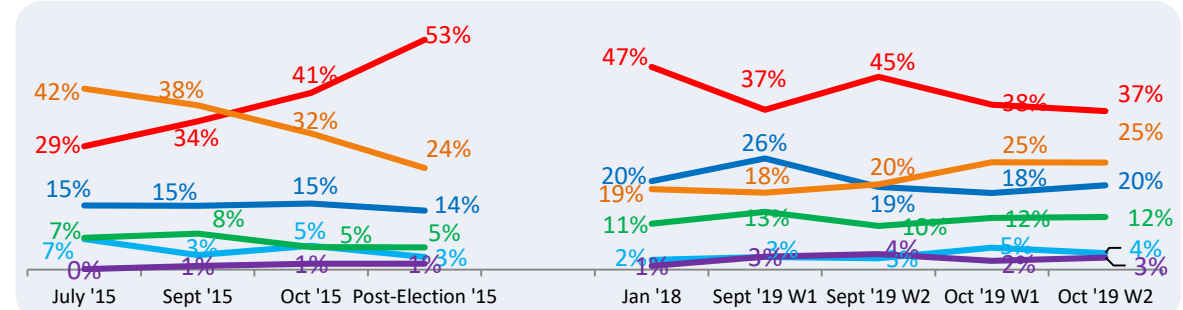
Note: Showing October 2019 Wave 2 results.

Value Clusters: Liberal vote remains steady across groups while the NDP rise in the Core Left

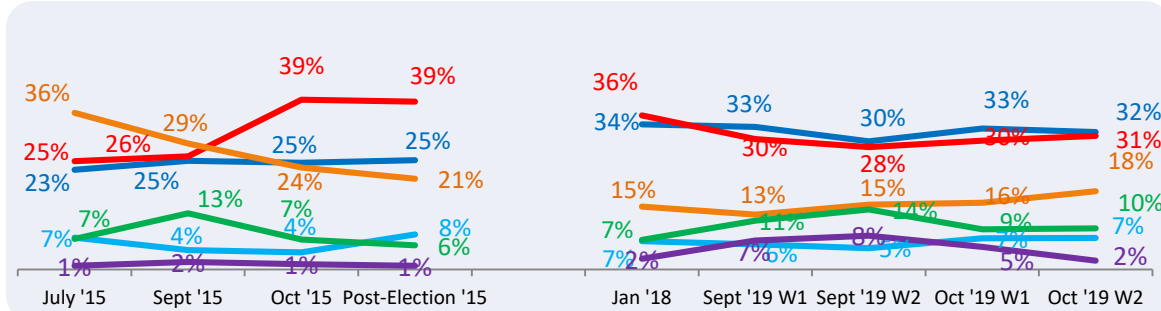
Core Left



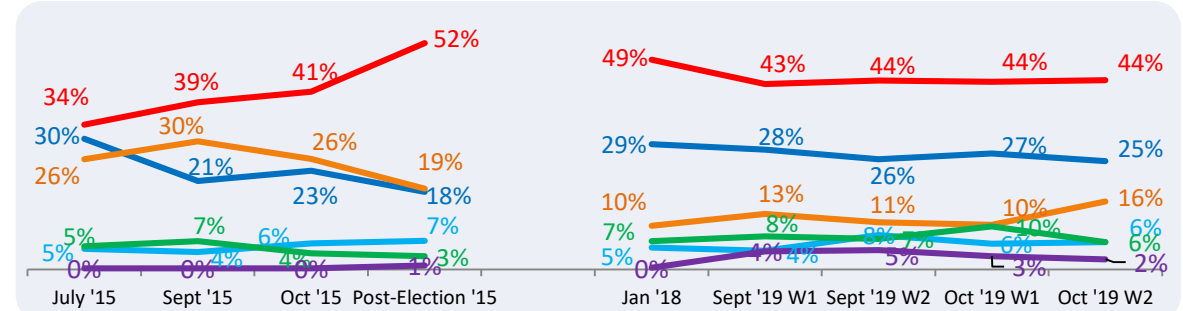
Left Liberals



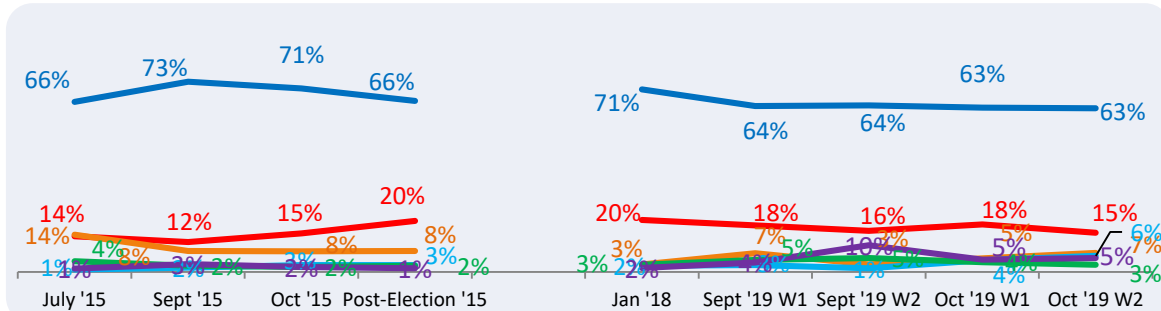
Thrifty Moderates



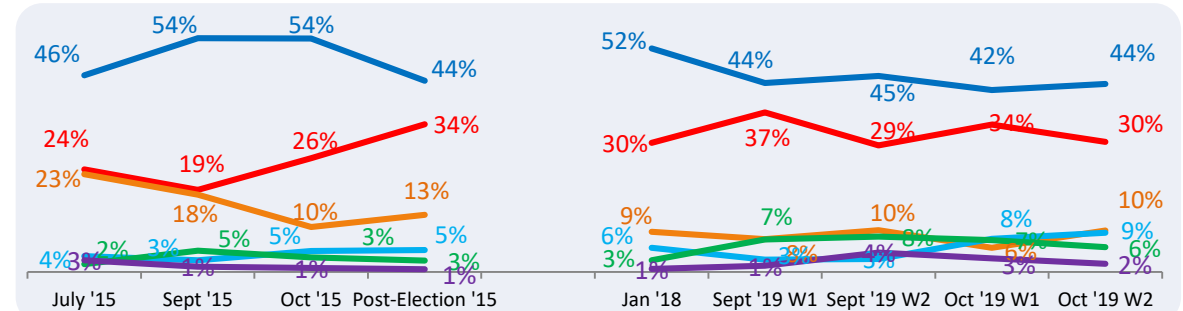
Business Liberals



Populist Conservatives



Deferral Conservatives



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

Decided vote:

Liberal

Conservative

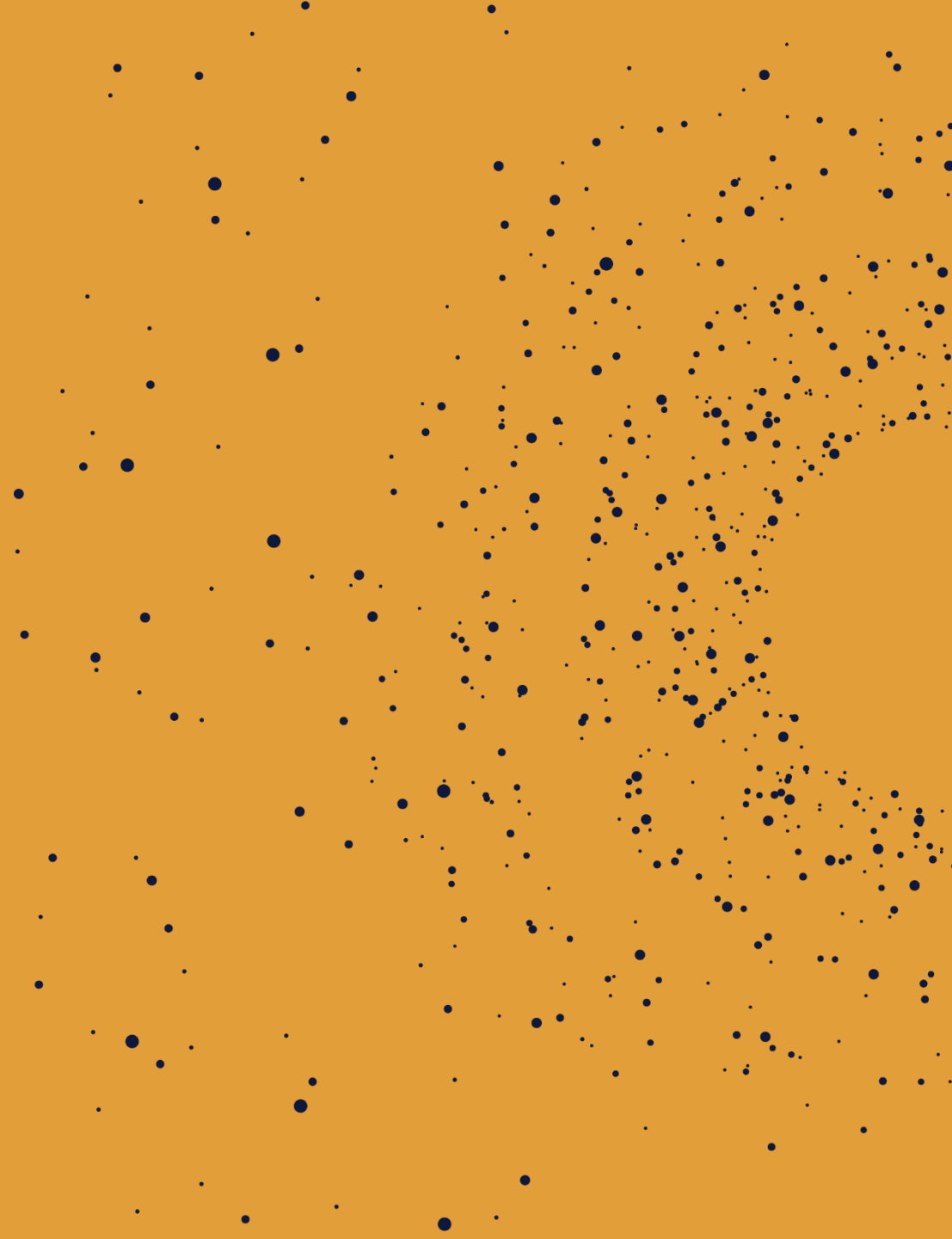
NDP

Green

Bloc

PPC/Other

The Economic Gap



Segmentation Attitudes: A majority of Canadians both believe in the Canadian dream and say it is harder to get by



Now turning to a different subject...Do you agree or disagree with the following statements?

[asked of all respondents; n=3,000]

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



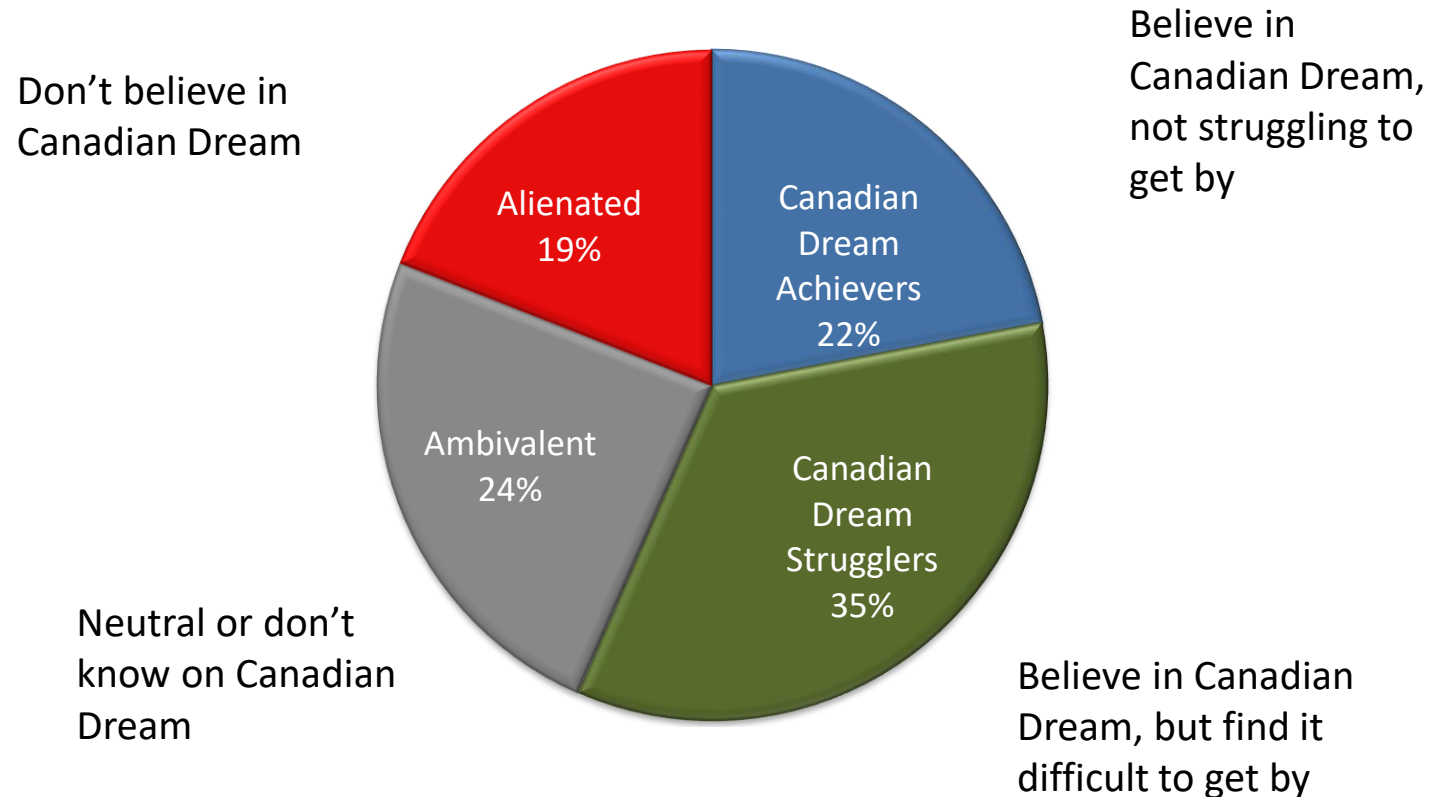
Note: Showing October 2019 Wave 2 results.

Economic Gap Segmentation: More than 1-in-3 (35%) believe in the Canadian dream but are struggling to get by



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”.

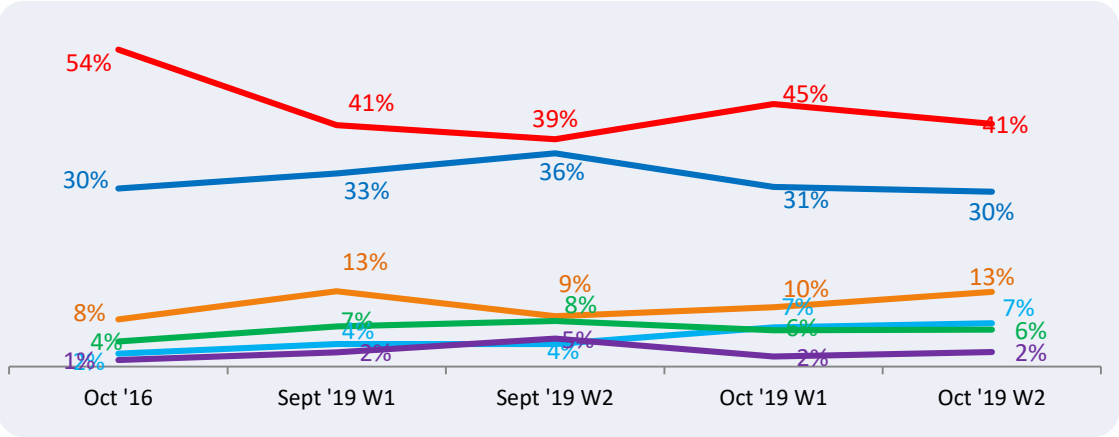
[asked of all respondents; n=3,000]



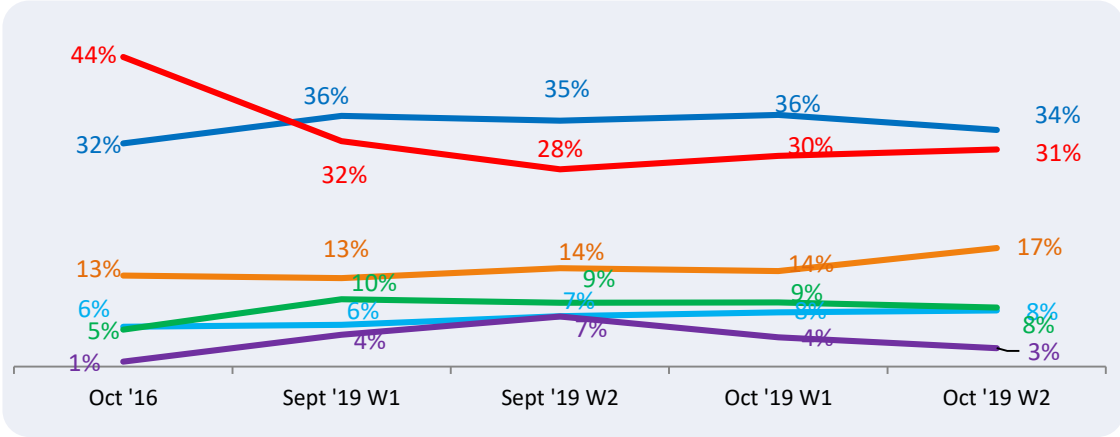
Note: Showing October 2019 Wave 2 results.

Federal Vote by Gap Segments: CPC marginally leads among Strugglers compared to Liberals; NDP up among Alienated voters

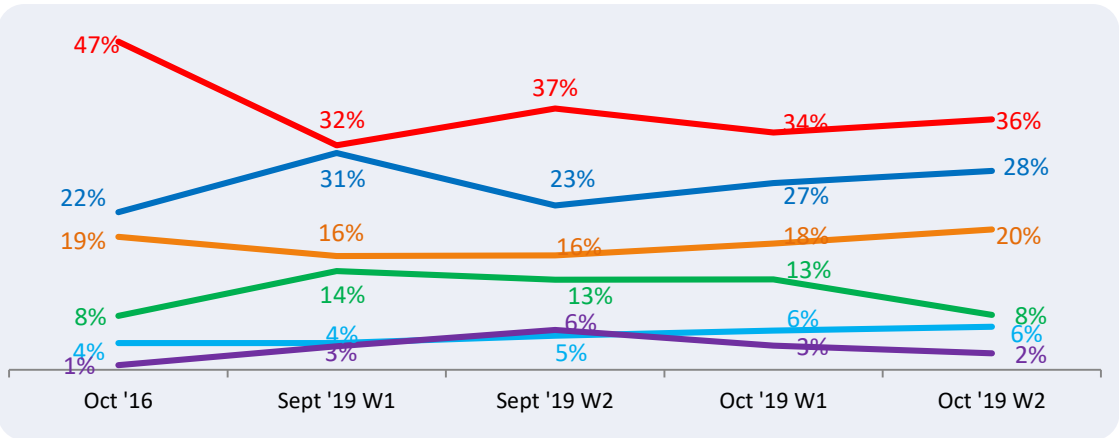
Canadian Dream Achievers



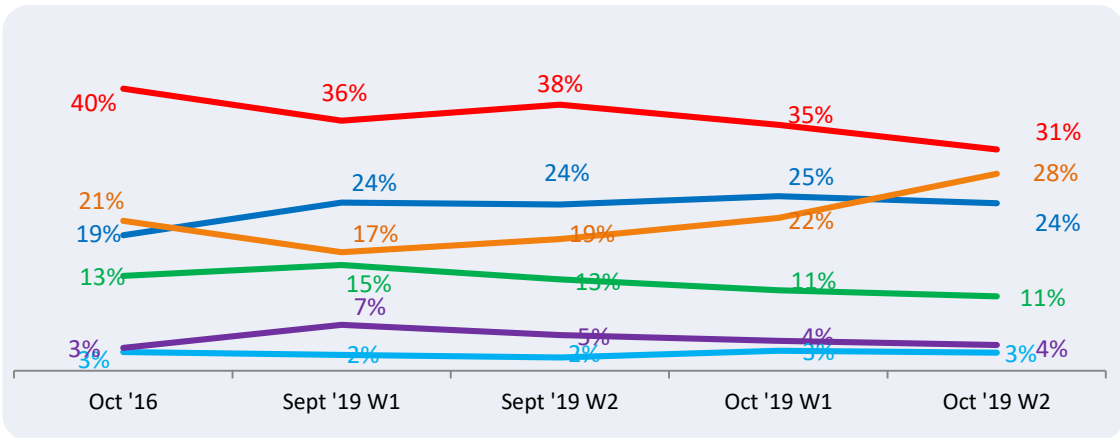
Canadian Dream Strugglers



Ambivalent



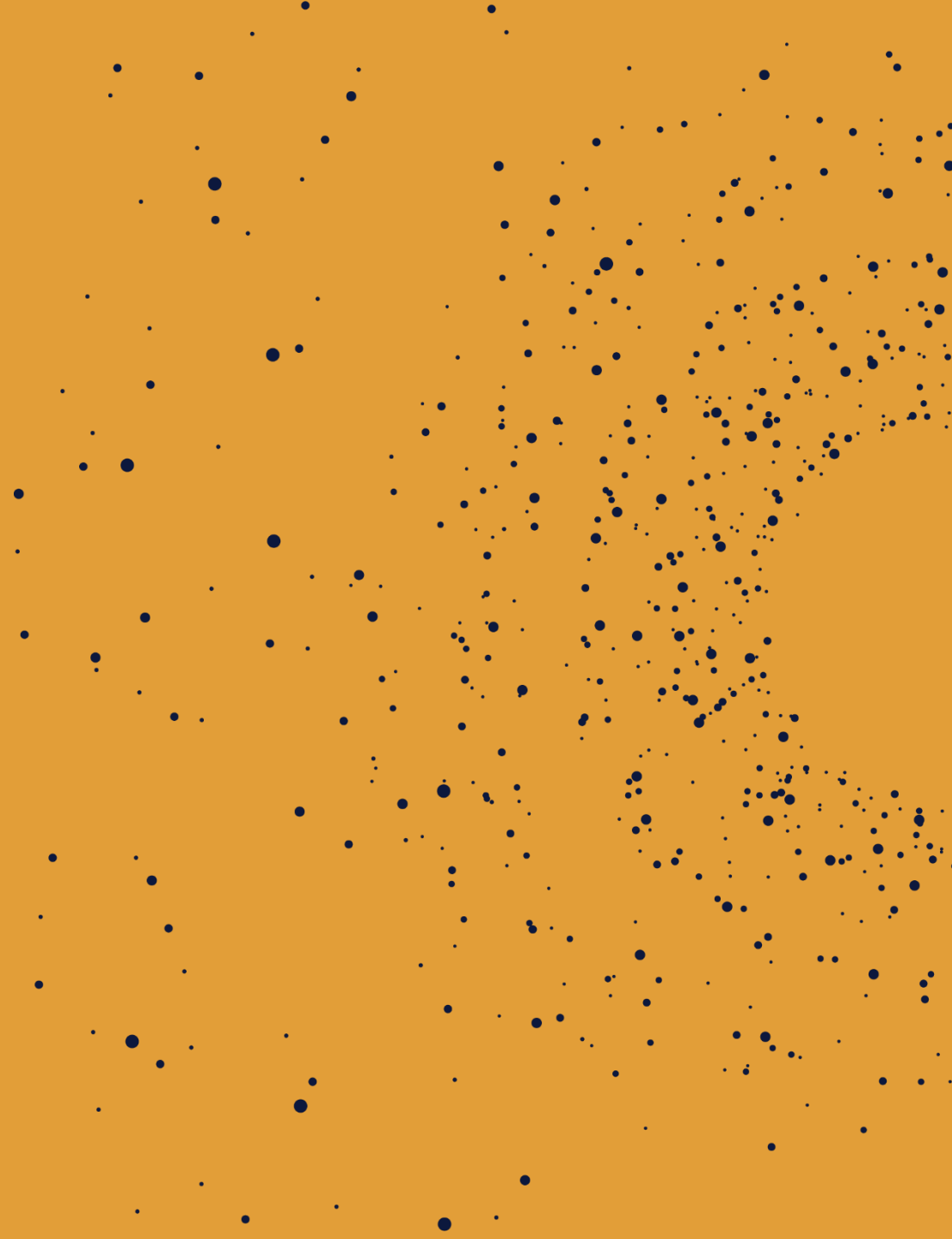
Alienated



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

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

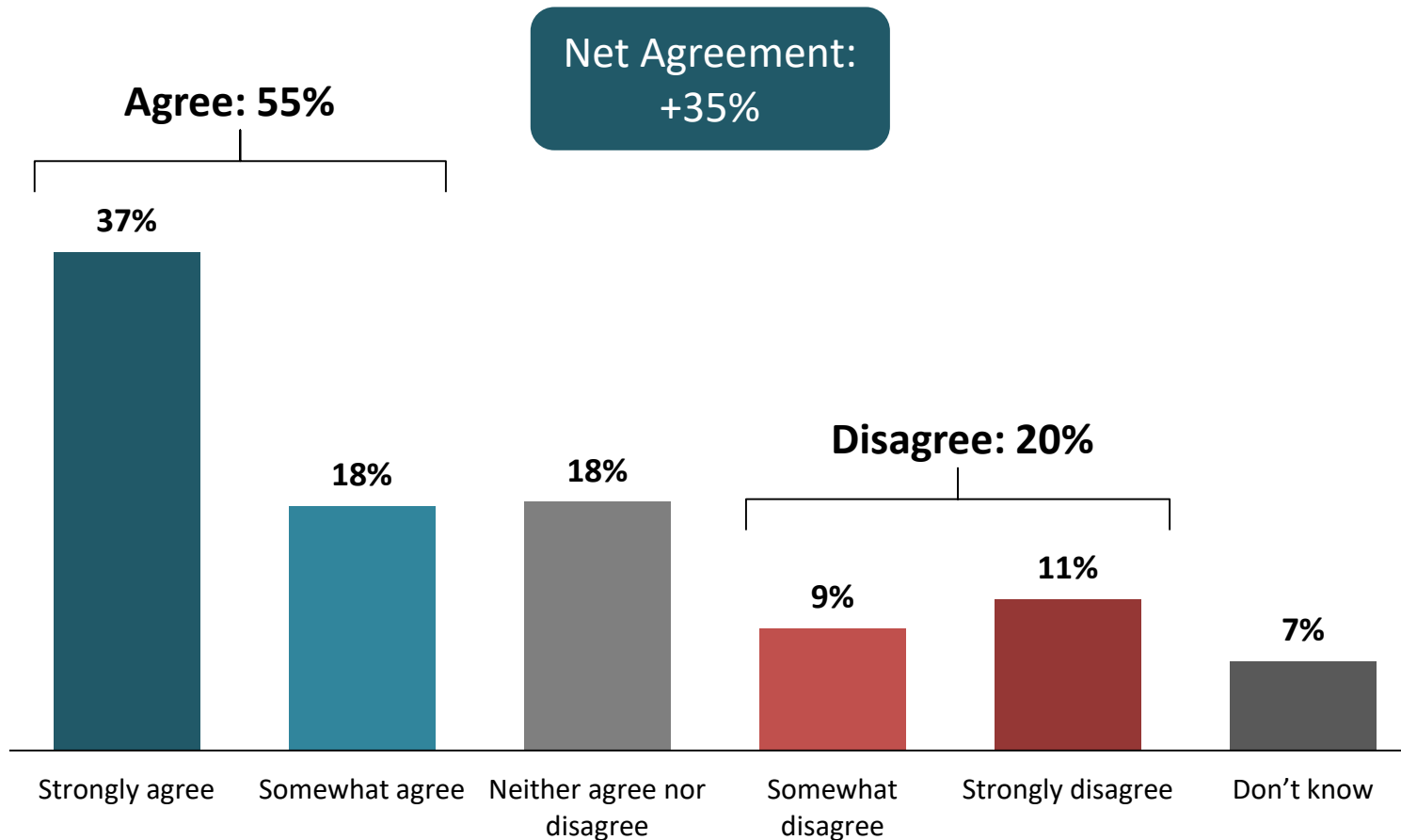
Time for a Change



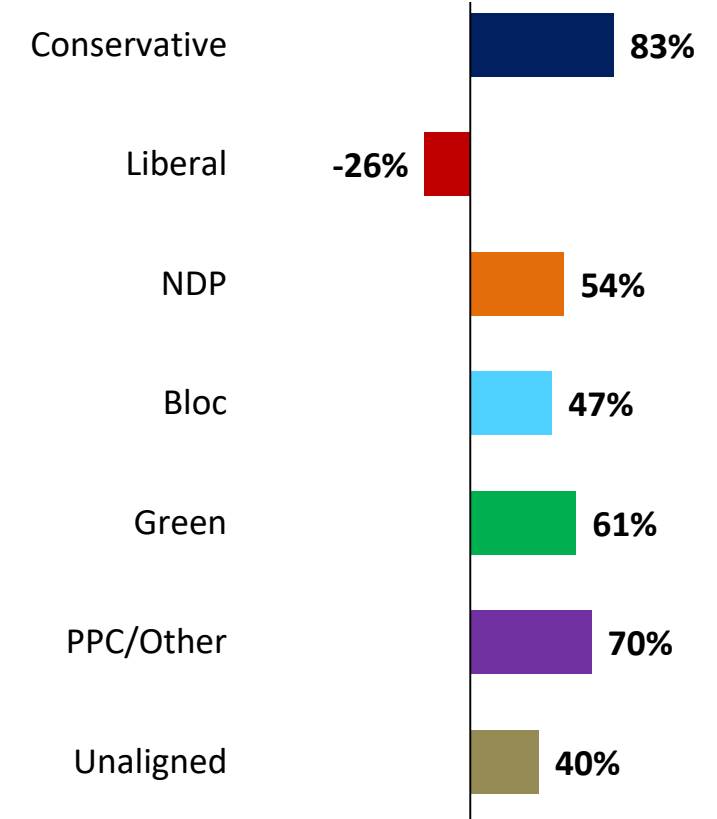
Time for a change: A majority believe it is time for a change, highest among Conservative partisans



Do you agree or disagree with the following statements? It is time for a change in government here in Canada. [asked of all respondents; n=3,000]



Party ID Segmentation Net agreement



Note: Net agreement is [Total agree]-[Total disagree].

Best of a bad lot: Respondents are split on whether or not the Liberals are still the best party to form government

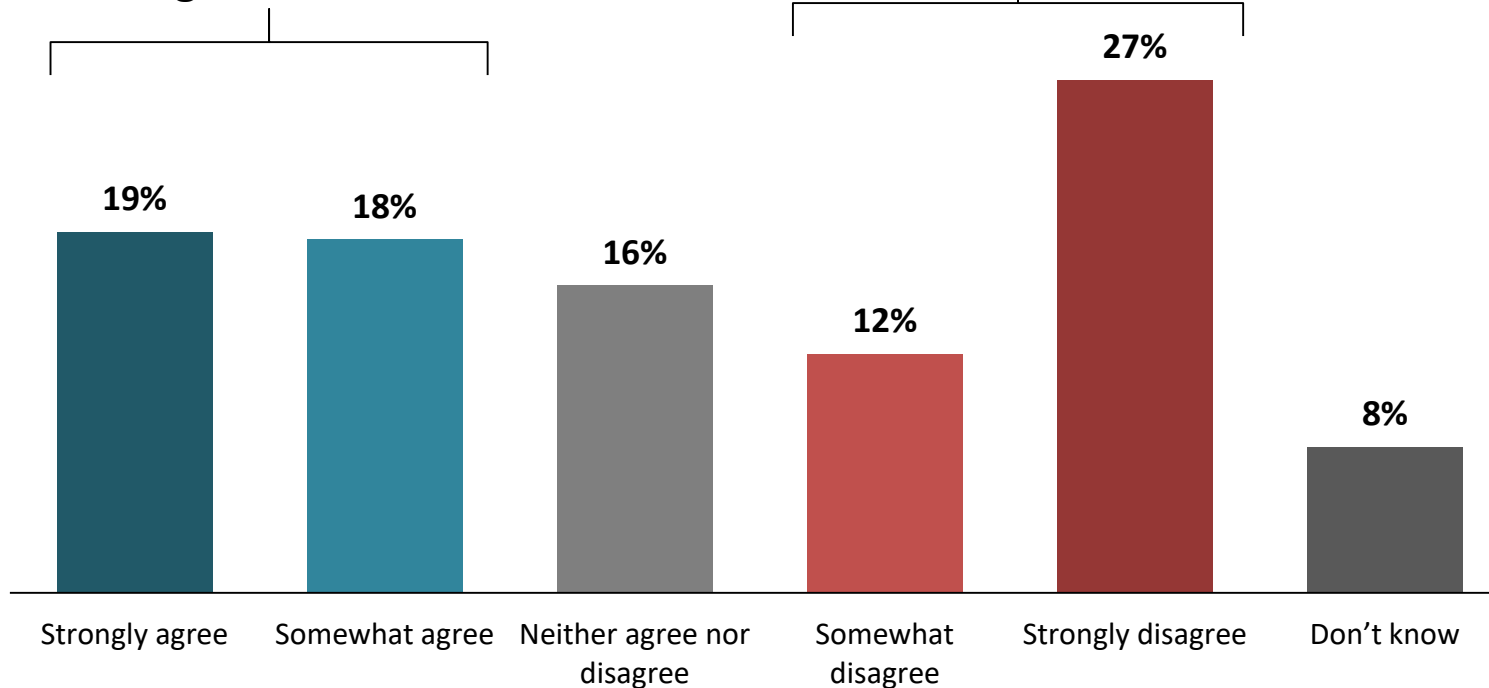


Do you agree or disagree with the following statements? The Liberals may have their problems but they are still the best party to form government. [asked of all respondents; n=3,000]

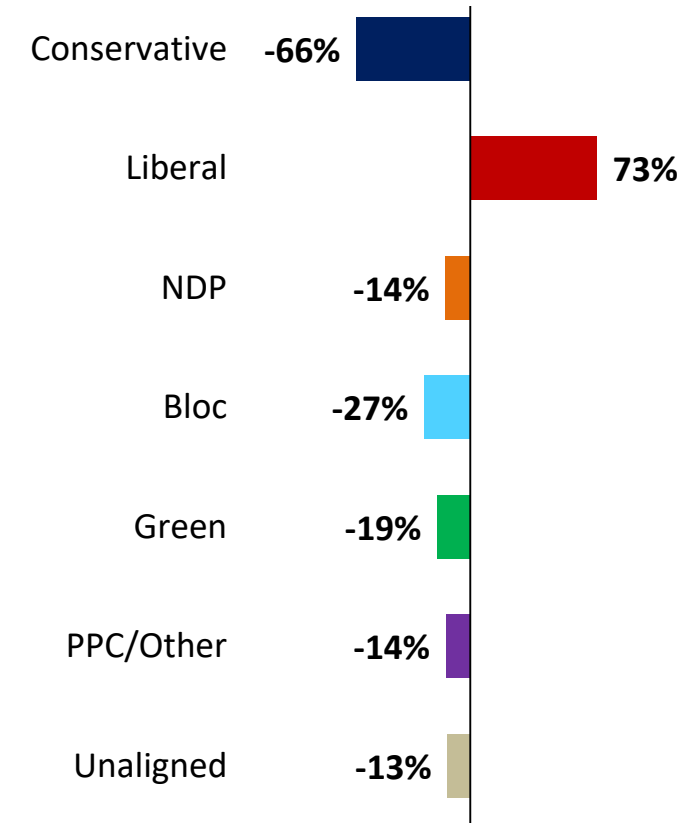
Net Agreement:
-2%

Disagree: 39%

Agree: 37%



Party ID Segmentation Net agreement



Note: Net agreement is [Total agree]-[Total disagree].

Time for 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.

		Strongly disagree	Somewhat disagree	Neutral/ Don't know	Somewhat agree	Strongly agree
		LPC Best Party for Government				
Time for Change	Strongly agree	Hostile	Soft Anti-LPC		Time for Change LPC	
	Somewhat agree	Soft Anti-LPC		Soft Anti-LPC		
	Neutral/ Don't know			Uncertain	Soft LPC	
	Somewhat disagree			Soft LPC	Core LPC	
	Strongly disagree					

Time for Change Segmentation: Respondents were grouped together based on their views of the LPC

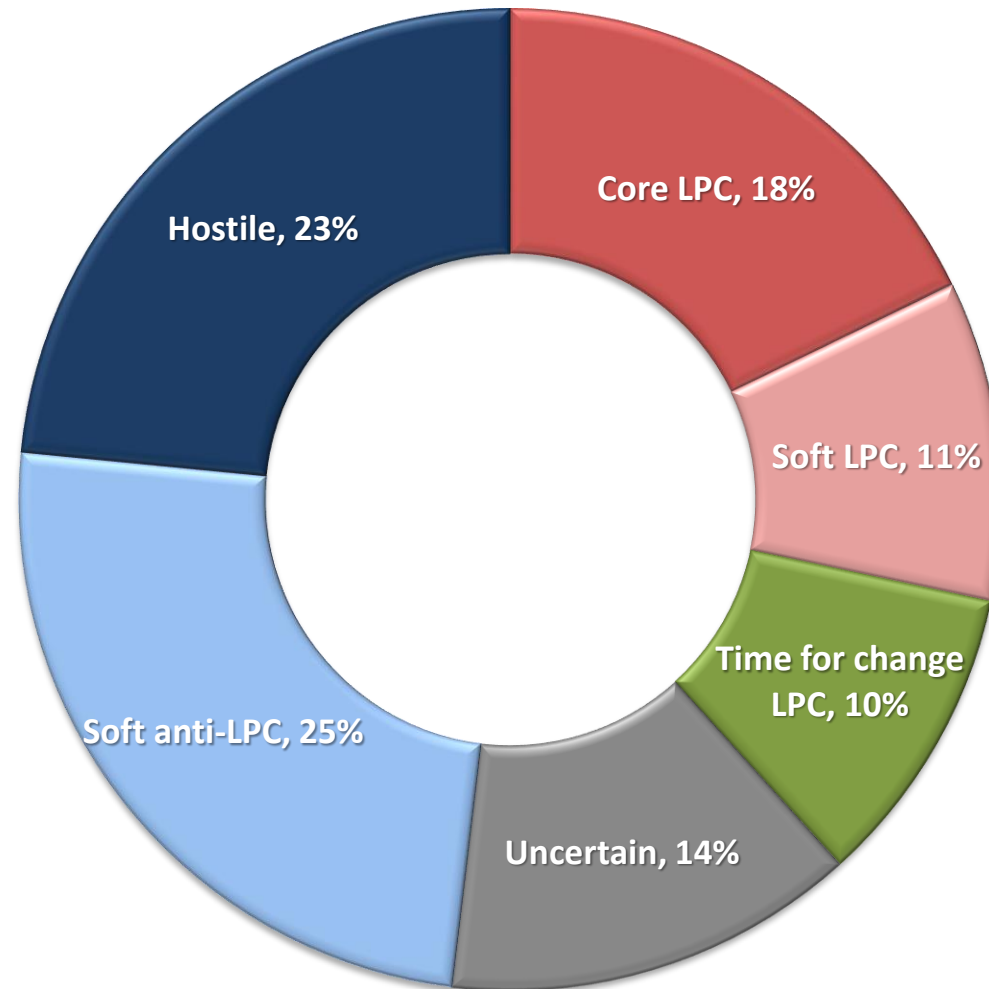


Do you agree or disagree with the following statements? It is time for a change in government here in Canada.

Do you agree or disagree with the following statements? The Liberals may have their problems but they are still the best party to form government.

[asked of all respondents; n=3,000]

Think it is time for a change and
do not believe the Liberals are
best to form government

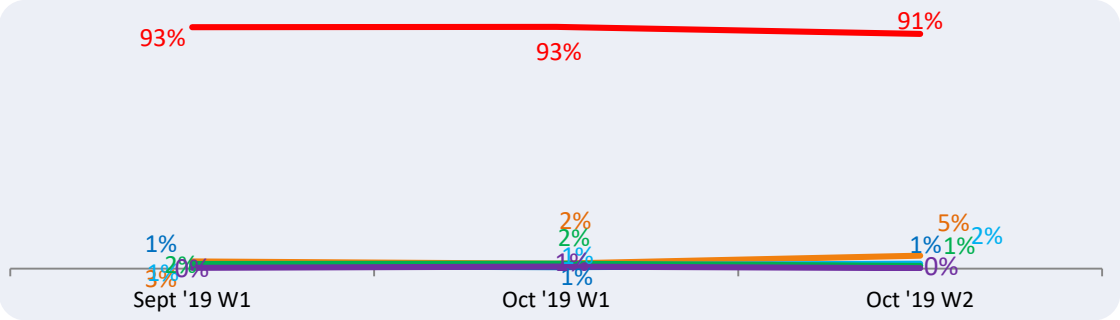


Do not think it is time for a change
and agree the Liberals are best to
form government

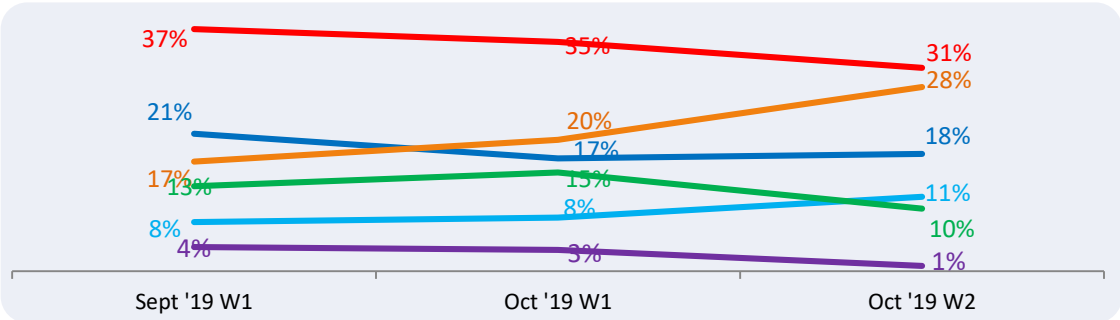
Think it is time for a change,
but believe the Liberals are
still best to form government

Vote by Tfc Segment: The NDP have gained among Time for a Change Liberals, Uncertain, and Soft Anti-LPC groups

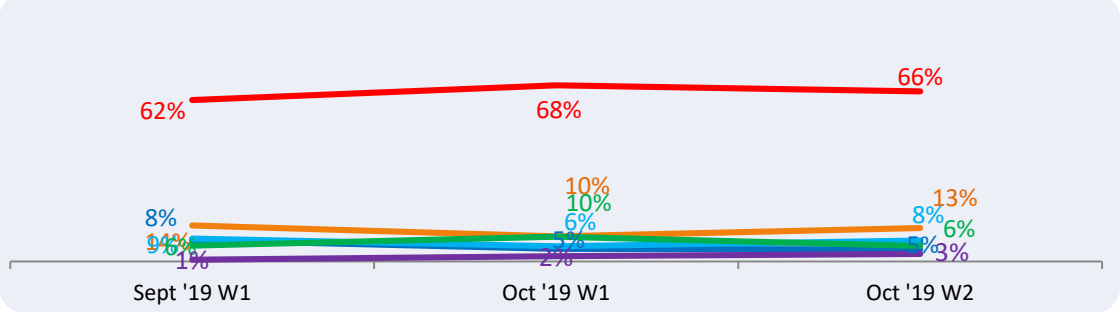
Core LPC



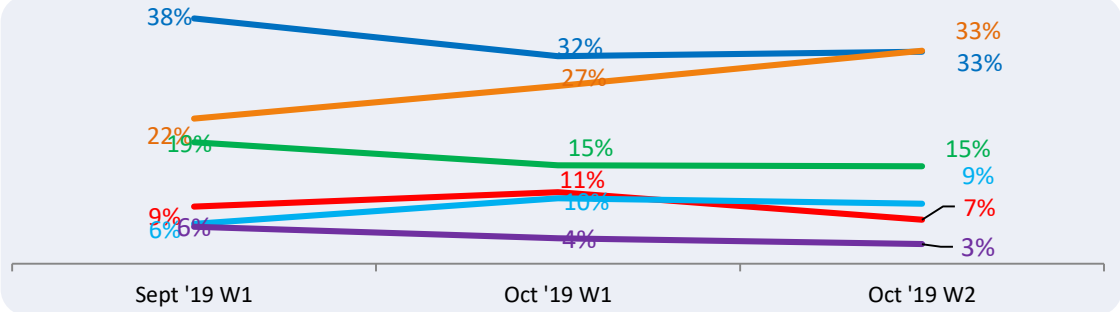
Uncertain



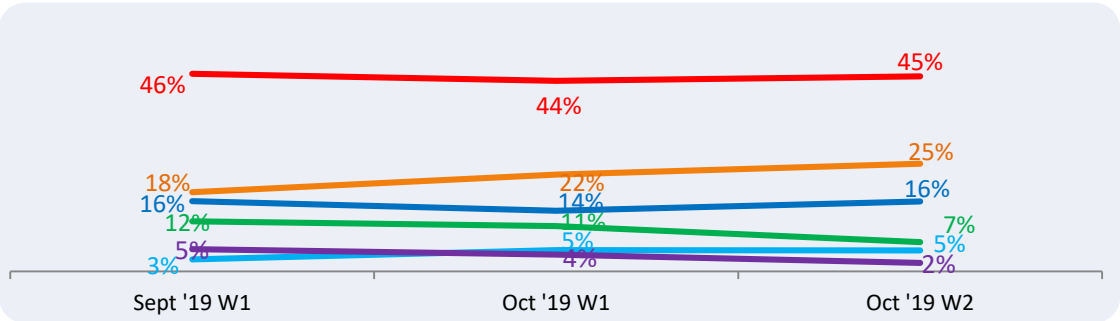
Soft LPC



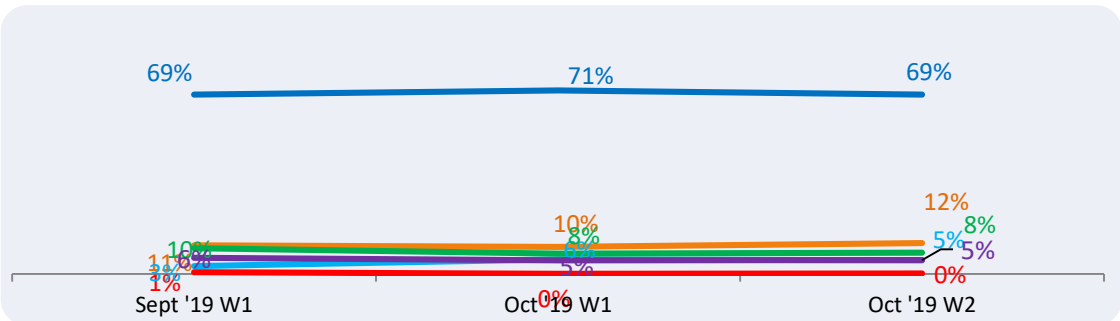
Soft Anti-LPC



Tfc LPC



Hostile



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

Decided vote:

Liberal

Conservative

NDP

Green

Bloc

PPC/Other



Building Understanding.

Personalized research to connect you and your audiences.

For more information, please contact:

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