



Canada This Month Quebec Politics

Public Opinion Research
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Field Dates: May 01, 2020 to May 05, 2020

Quebec Politics in the time of COVID-19

The COVID-19 outbreak has set off a series of changes in the Canadian political landscape. In Quebec, after initially giving him extremely high marks, Quebecers views of how Legault has handled the crisis have come back down to earth the longer the situation has worn on. This has left mixed results for him politically and a tough election battle with the Liberals.

Today, INNOVATIVE is releasing results from our May 2020 Canada This Month survey. This online survey was in field from May 1st to May 5th with a weighted sample size of 300 Quebec residents. Detailed methodology is provided in the appendix.

This report covers key results on how those from Quebec are rating their government's handling of the COVID-19 outbreak and the impacts that is having on more general government approval and provincial vote choice.

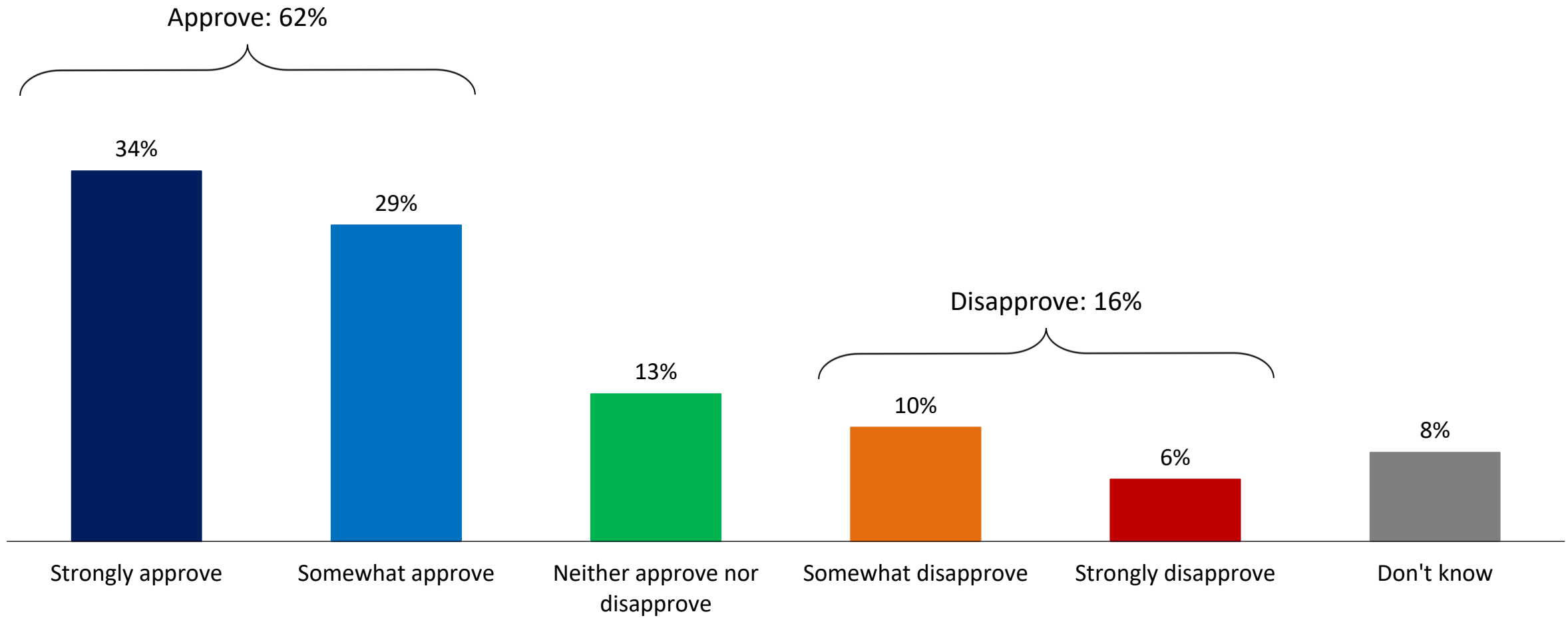
The Quebec government is receiving very high approval on handling of COVID-19 but has seen declines as the situation wears on

COVID-19 Handling: 3-in-5 (62%) say they approve of the Quebec gov'ts handling of COVID-19 while only 16% disapprove



Do you approve or disapprove of the way the Quebec Government has handled the outbreak of COVID-19?

[asked of all respondents; n=300]

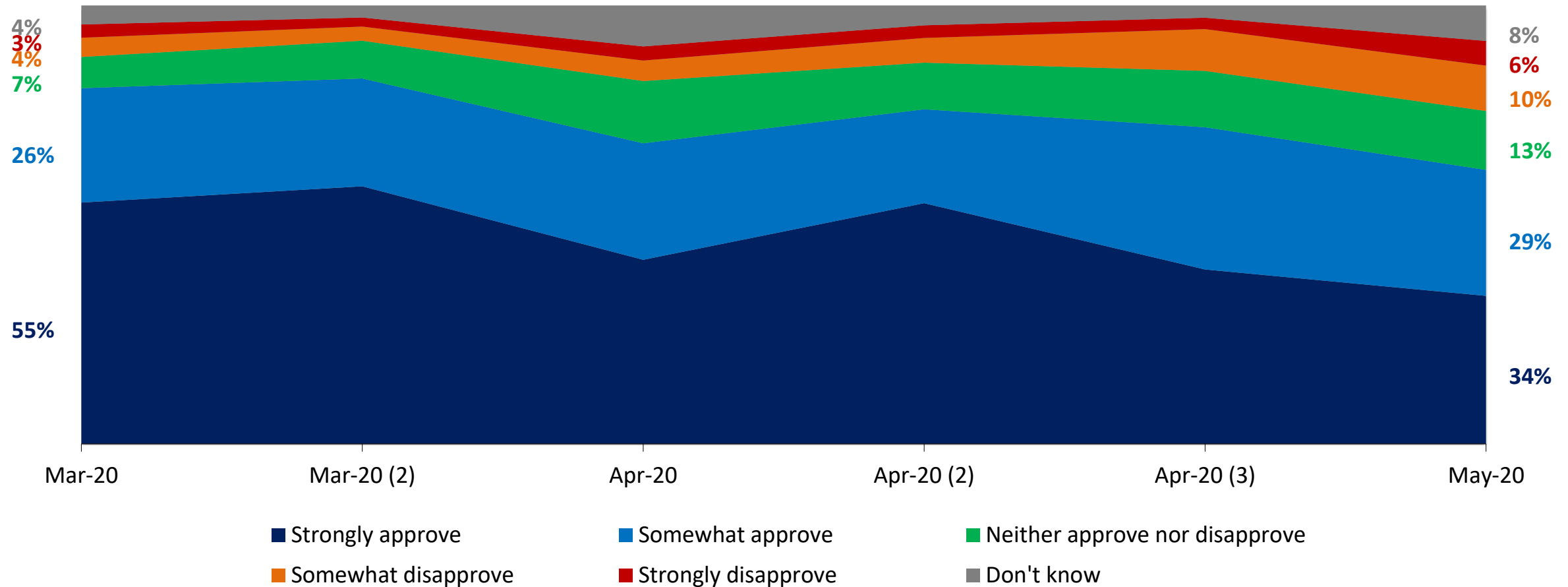


COVID-19 Handling Tracking: While still very high, approval of the QC gov'ts handling of the outbreak is trending downwards since mid-April



Do you approve or disapprove of the way the Quebec Government has handled the outbreak of COVID-19?

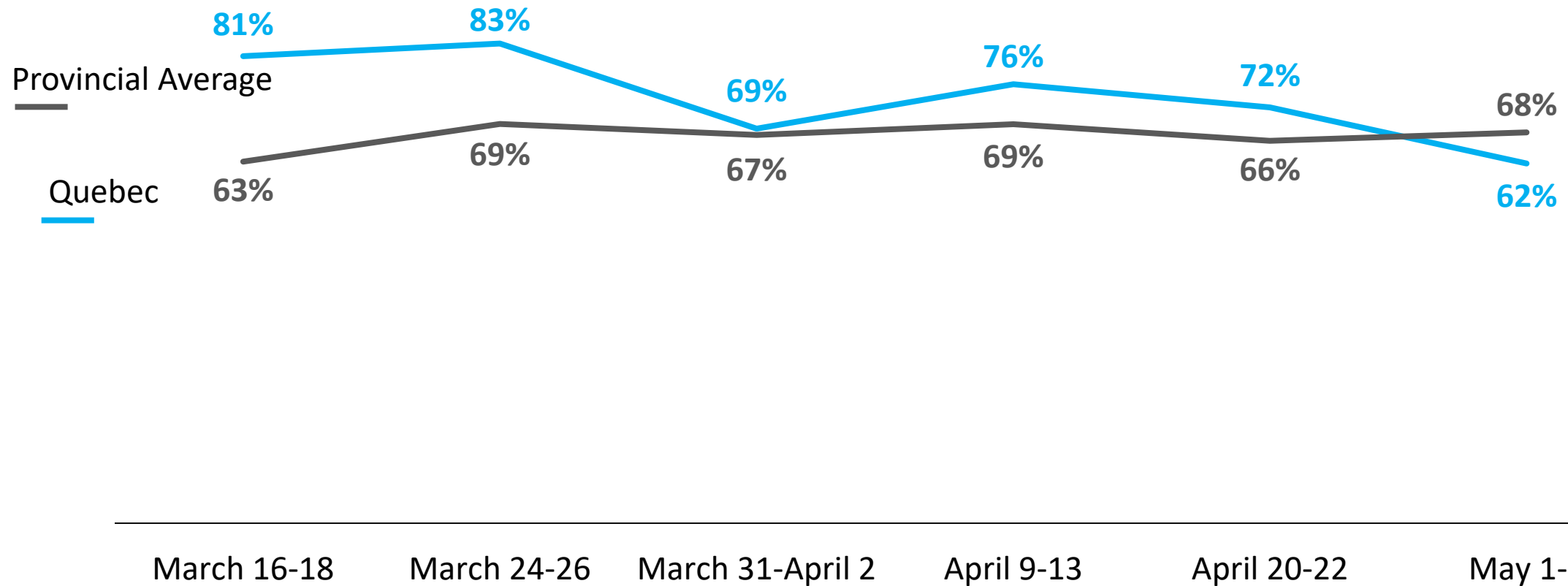
[asked of all respondents; n=300]



COVID-19 Handling Tracking: While the Quebec was viewed positively at first, it has declined and is now below the provincial average

% who approve of government's handling of COVID-19 outbreak: Quebec Vs. Provincial Average

[asked of all respondents; n=1500]



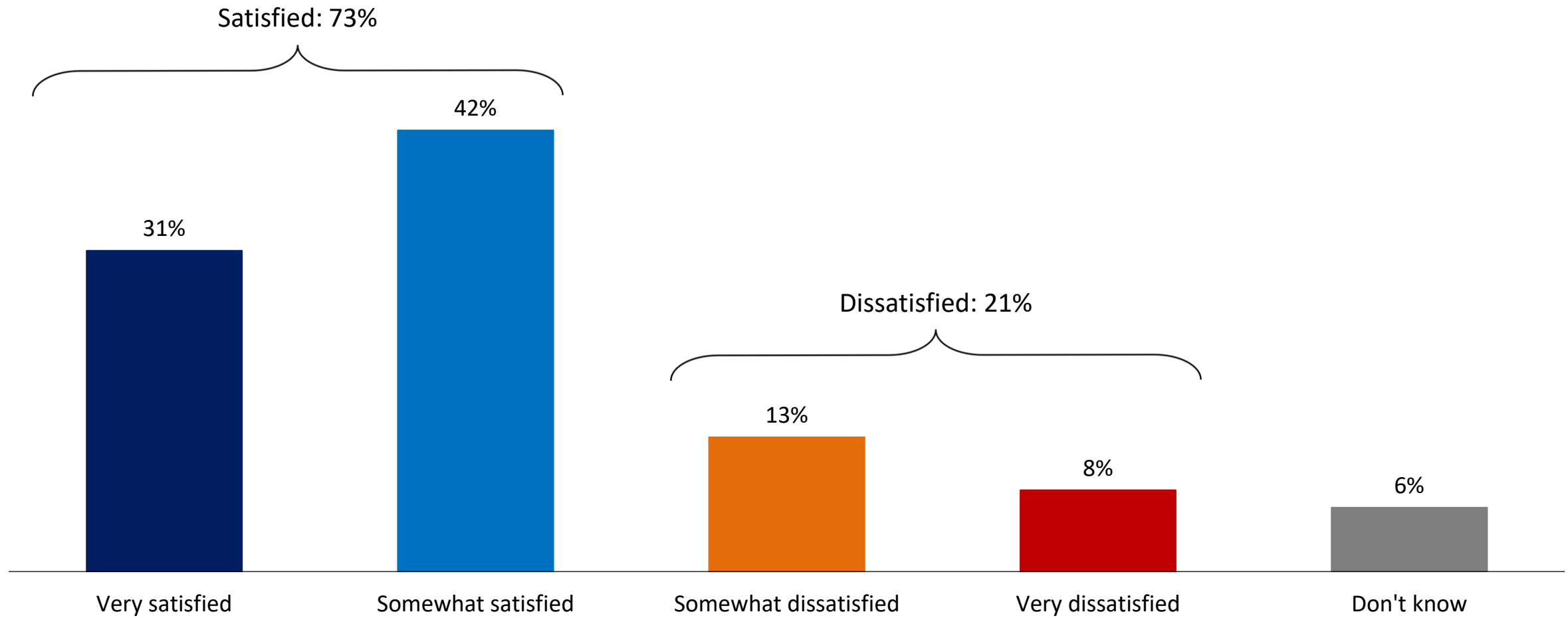
In light of the positive response to COVID handling, general government satisfaction is also high in Quebec

Quebec Mood: 3-in-4 (73%) say they are generally satisfied with the performance of the Quebec gov't while 1-in-5 (21%) say dissatisfied



Generally speaking, how satisfied are you with the performance of the PROVINCIAL government in Quebec? Would you say you are...?

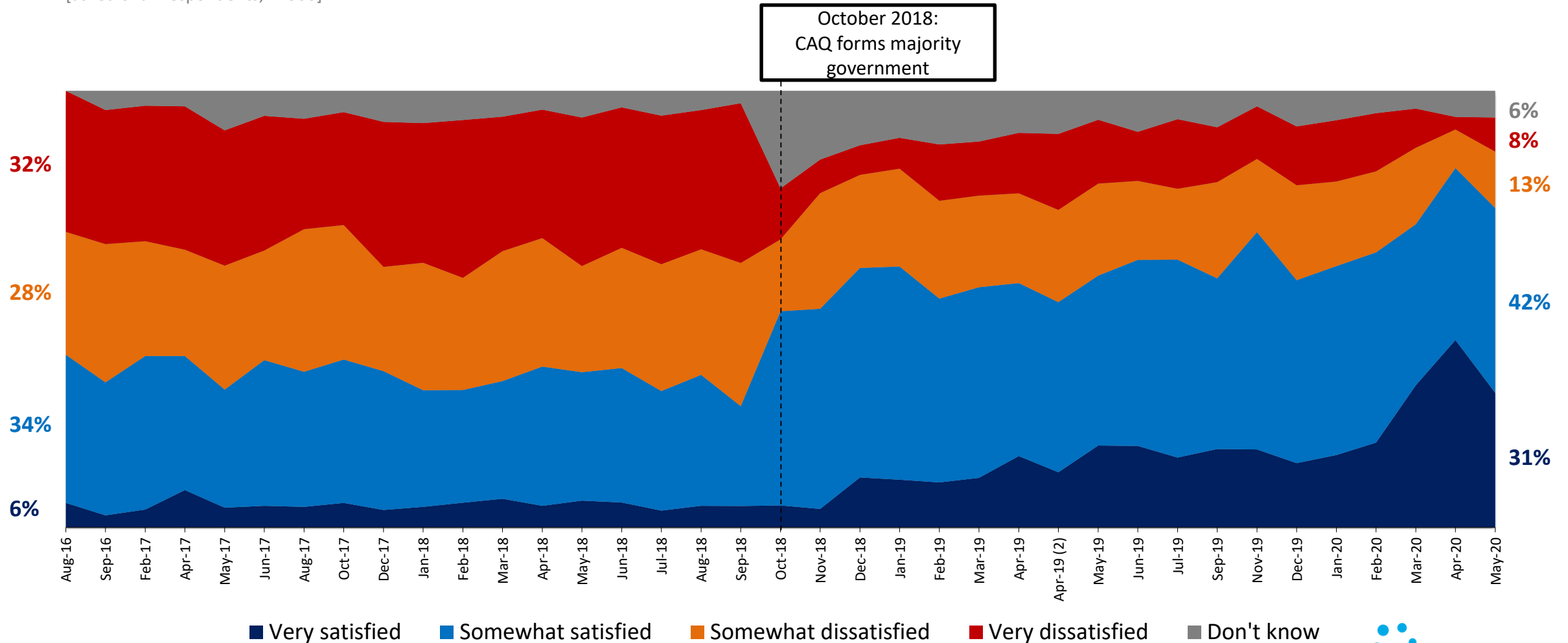
[asked of all respondents; n=300]



Quebec Mood Tracking: Those who say they are satisfied with the gov't⁹ is up overall since the beginning of the year, but down from April to May



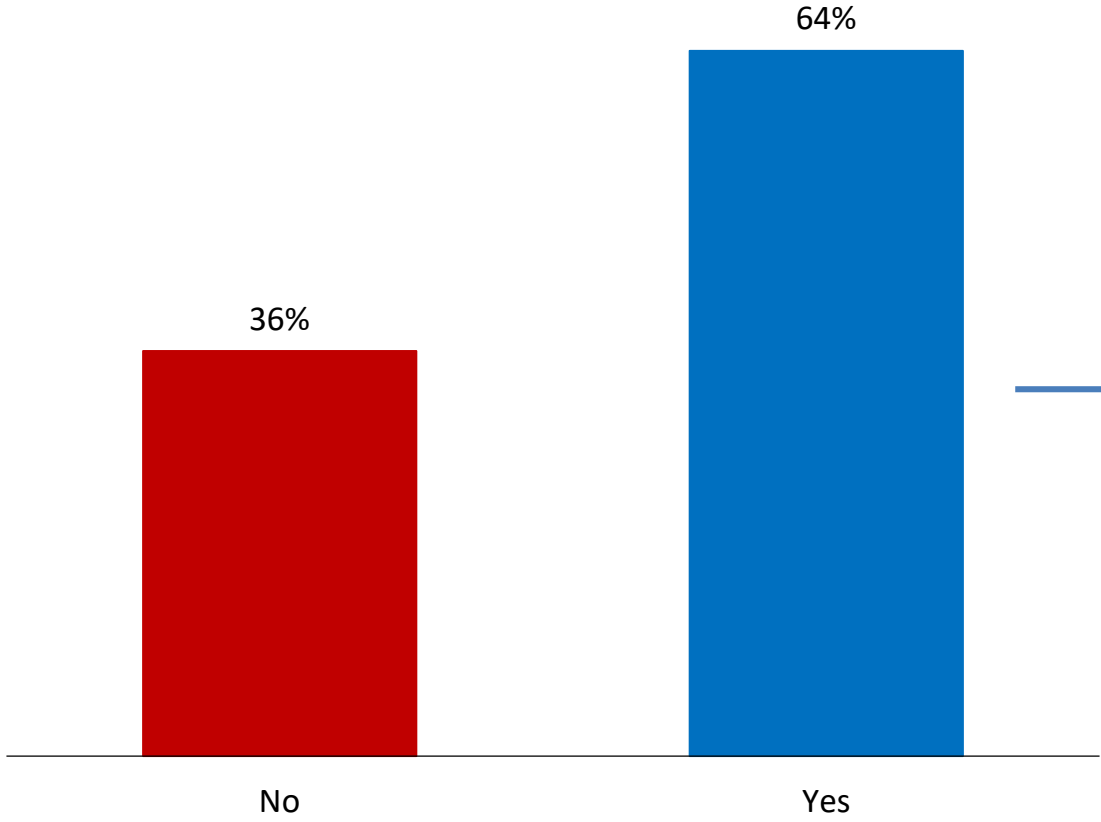
Generally speaking, how satisfied are you with the performance of the PROVINCIAL government in Quebec? Would you say you are...?
[asked of all respondents; n=300]



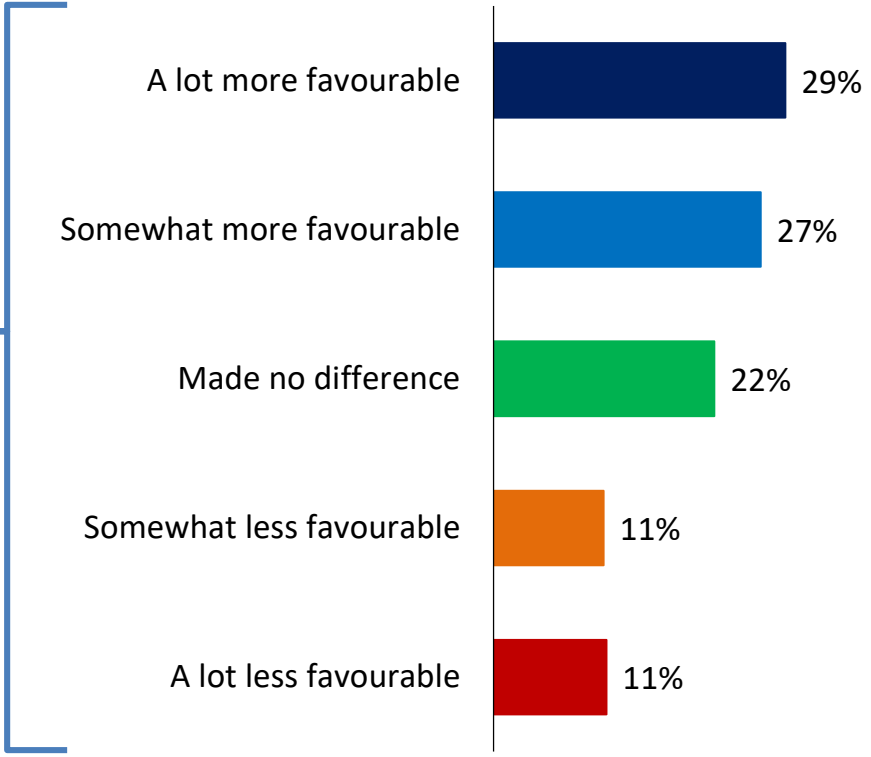
Close to 7-in-10 have read, seen, or heard about Legault in the last few days and a strong majority say it had a positive impact

Quebec Read, Seen, Heard: Over 3-in-5 (64%) say they have read, seen, or heard something about Legault; most are more favourable (56%)

Q Have you read, seen or heard anything about Francois Legault in the last few days?
[Asked of those who have RSH; n=300]



Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Francois Legault, or did it make no difference?
[Asked of those who have RSH; n=191]

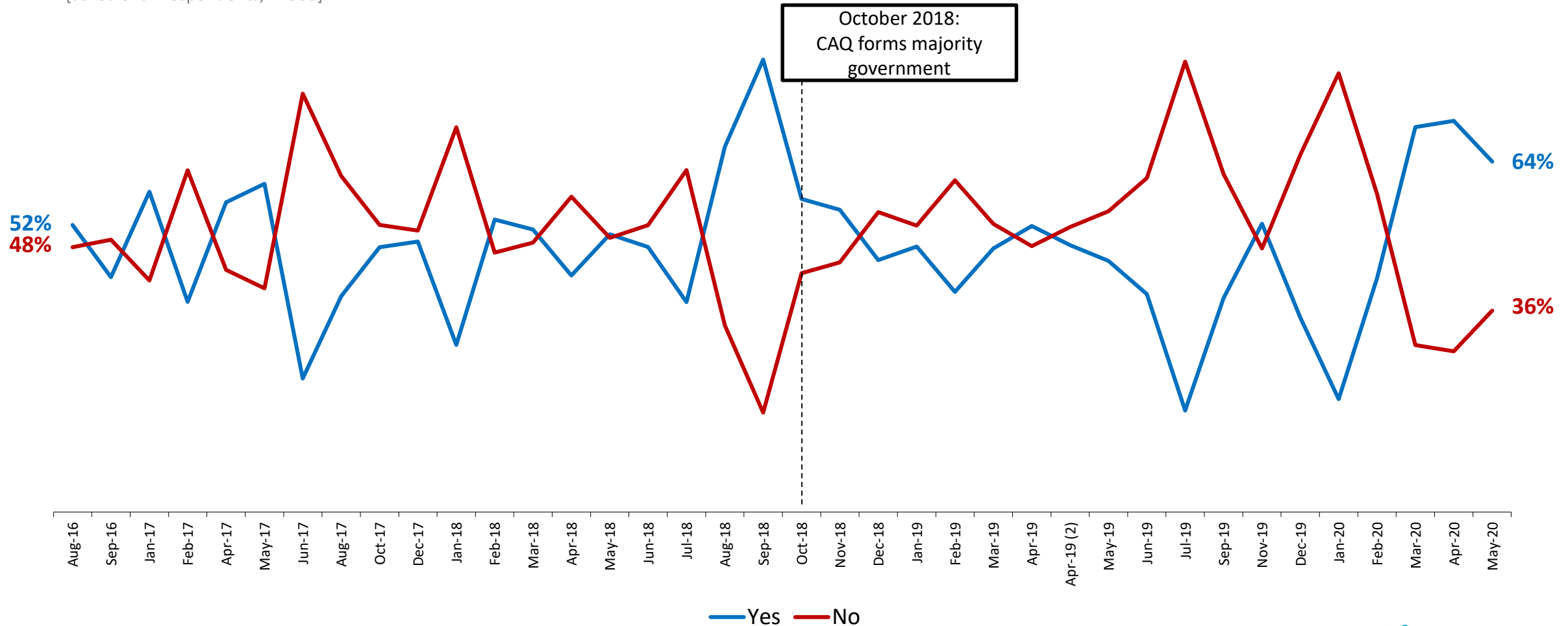


Read, Seen, Heard Tracking: Nearly two-thirds (64%) say they have R/S/H about Legault, down slightly since April but still very high



Have you read, seen or heard anything about Francois Legault in the last few days?

[asked of all respondents; n=300]



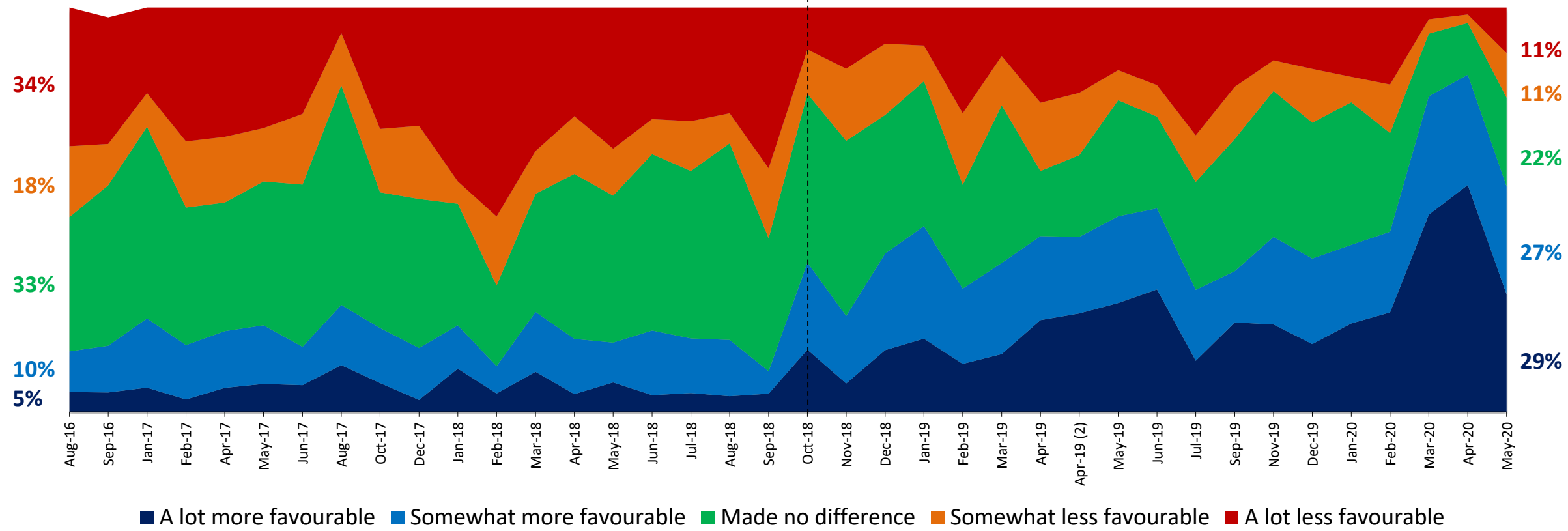
Quebec Read, Seen, Heard, Impact Tracking: Those left more favourable is down 28-pts month-to-month to 56% but still net positive



Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Francois Legault, or did it make no difference?

[asked of those who have RSH; n=191]

October 2018:
CAQ forms majority government



Note: Don't know not shown.
Current data: May 2020

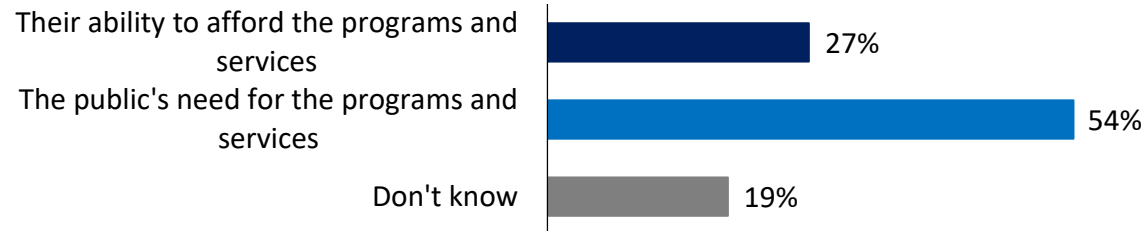
We group individuals into segments based on key political and economic values and attitudes

We use these segments throughout the remainder of the report to further analyze vote leadership results.

Core Political Values: Over half (53%) say the government should listen to experts when it comes to policy

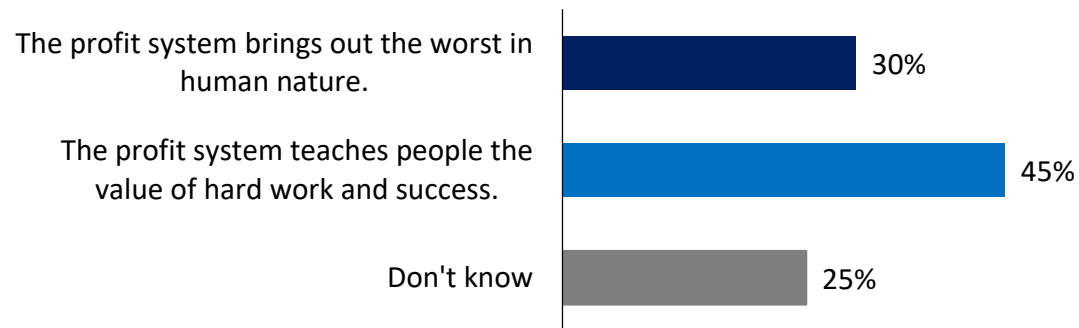
Q Now we would like to ask a few questions about basic values and society...When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?

[asked of all respondents; n=300]



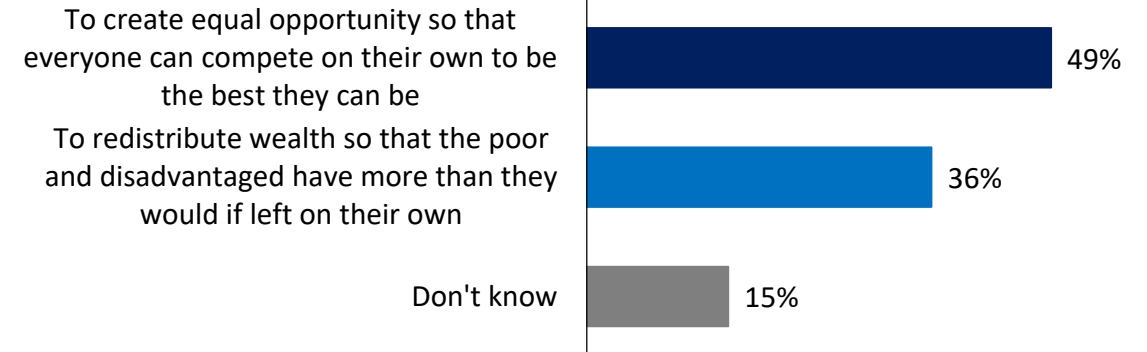
Q Which of the following statements comes closest to your view?

[asked of all respondents; n=300]



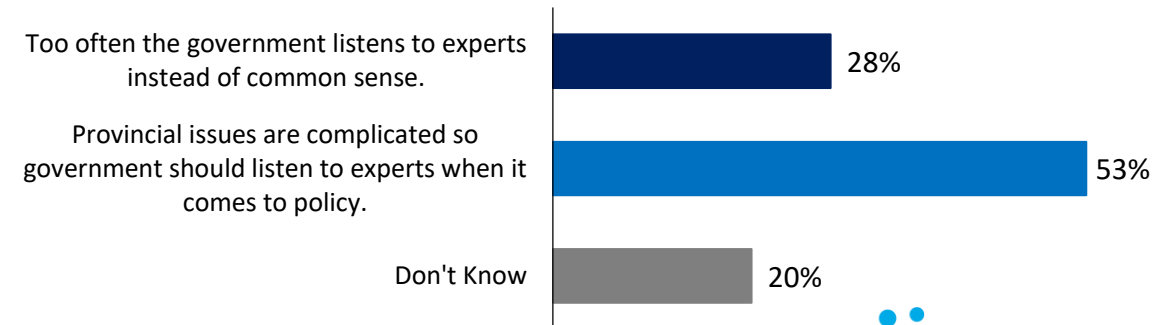
Q Is the main role of government to...?

[asked of all respondents; n=300]



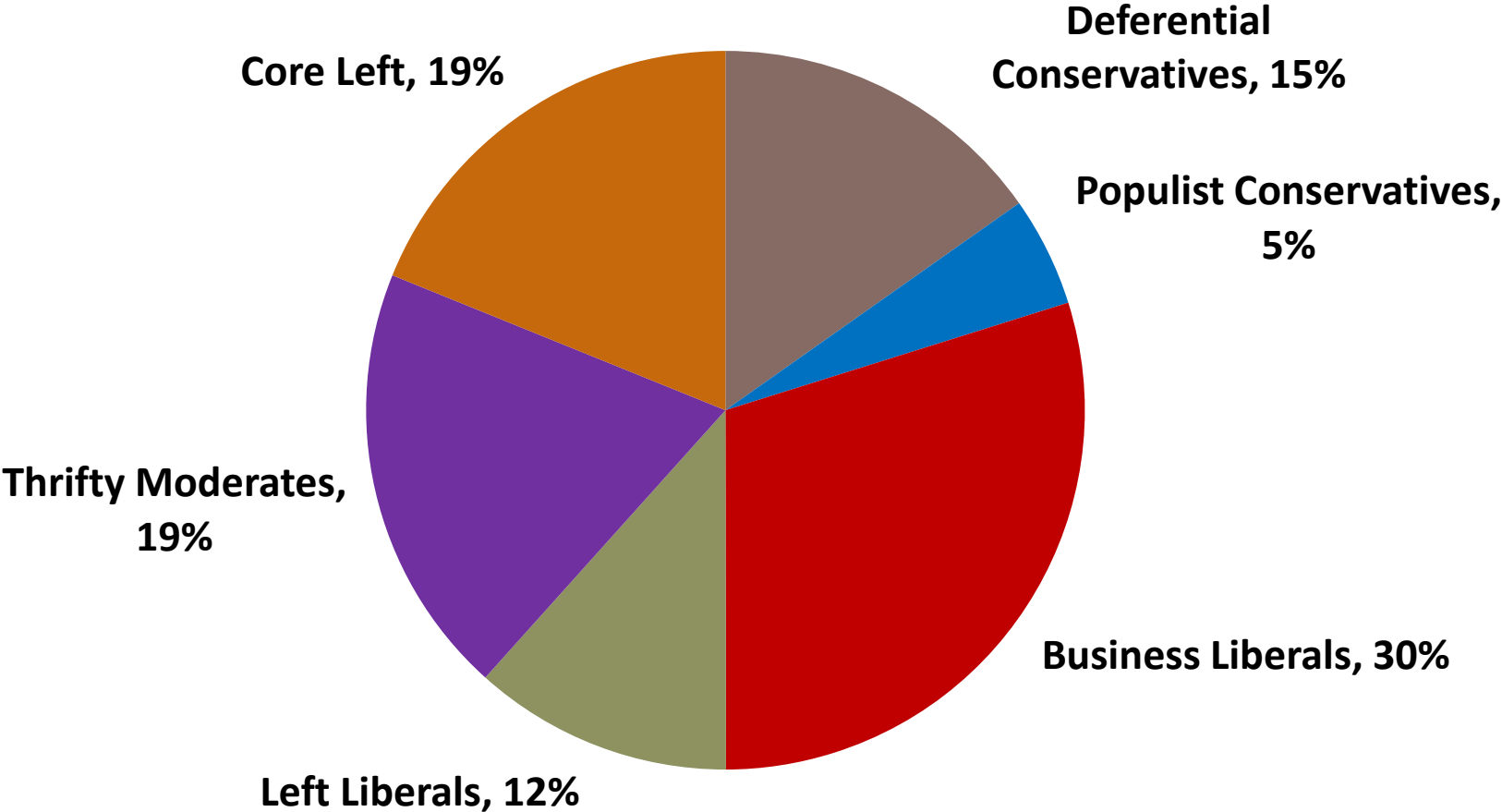
Q When it comes to government decision making, which of the following statements is closest to your view?

[asked of all respondents; n=300]



Value Clusters: 3-in-10 (30%) are Business Liberals followed by 19% for Thrifty Moderates and 19% for Core Left

Value Clusters: 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=300]



Defining Value Clusters: Liberal clusters split on the role of the profit system, Conservative clusters split on deference towards authority

Core Political Values by Value Clusters

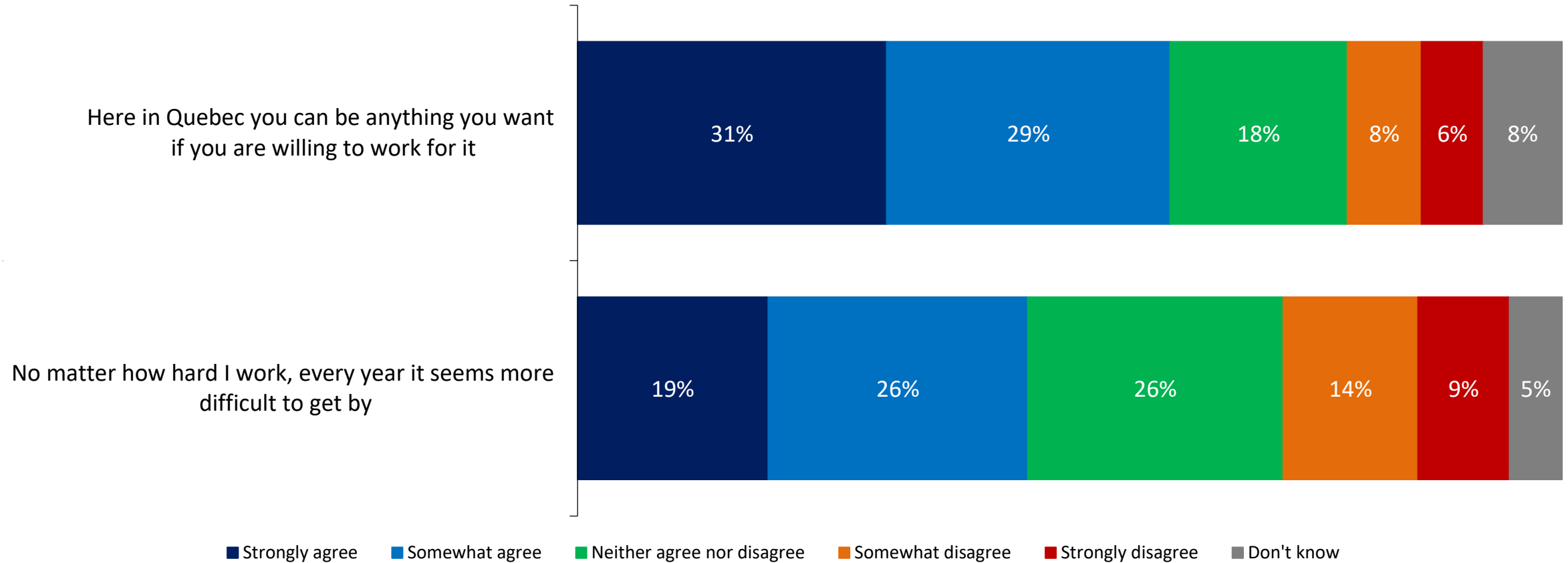
| Column % | | Deferential Conservatives | Populist Conservatives | Business Liberals | Left Liberals | Thrifty Moderates | Core Left |
|--|--|---------------------------|------------------------|-------------------|---------------|-------------------|-----------|
| Governments should base decisions on... | Ability to afford | 81% | 89% | 0% | 0% | 53% | 0% |
| | Public Need | 0% | 0% | 99% | 86% | 0% | 79% |
| Is the main role of government to .? | Create equal Opportunity | 74% | 94% | 60% | 97% | 19% | 0% |
| | Redistribute wealth | 18% | 0% | 31% | 0% | 30% | 98% |
| When it comes to government decision making... | Rely on common sense | 0% | 100% | 23% | 30% | 32% | 33% |
| | Listen to experts | 91% | 0% | 65% | 47% | 17% | 57% |
| The profit system... | Brings out the worst in human nature | 0% | 0% | 0% | 72% | 39% | 73% |
| | Teaches value of hard work and success | 91% | 87% | 85% | 0% | 9% | 0% |

Segmentation Attitudes: 6-in-10 (60%) believe that in Quebec, you can be anything you want if you're willing to work for it



Do you agree or disagree with the following statements?

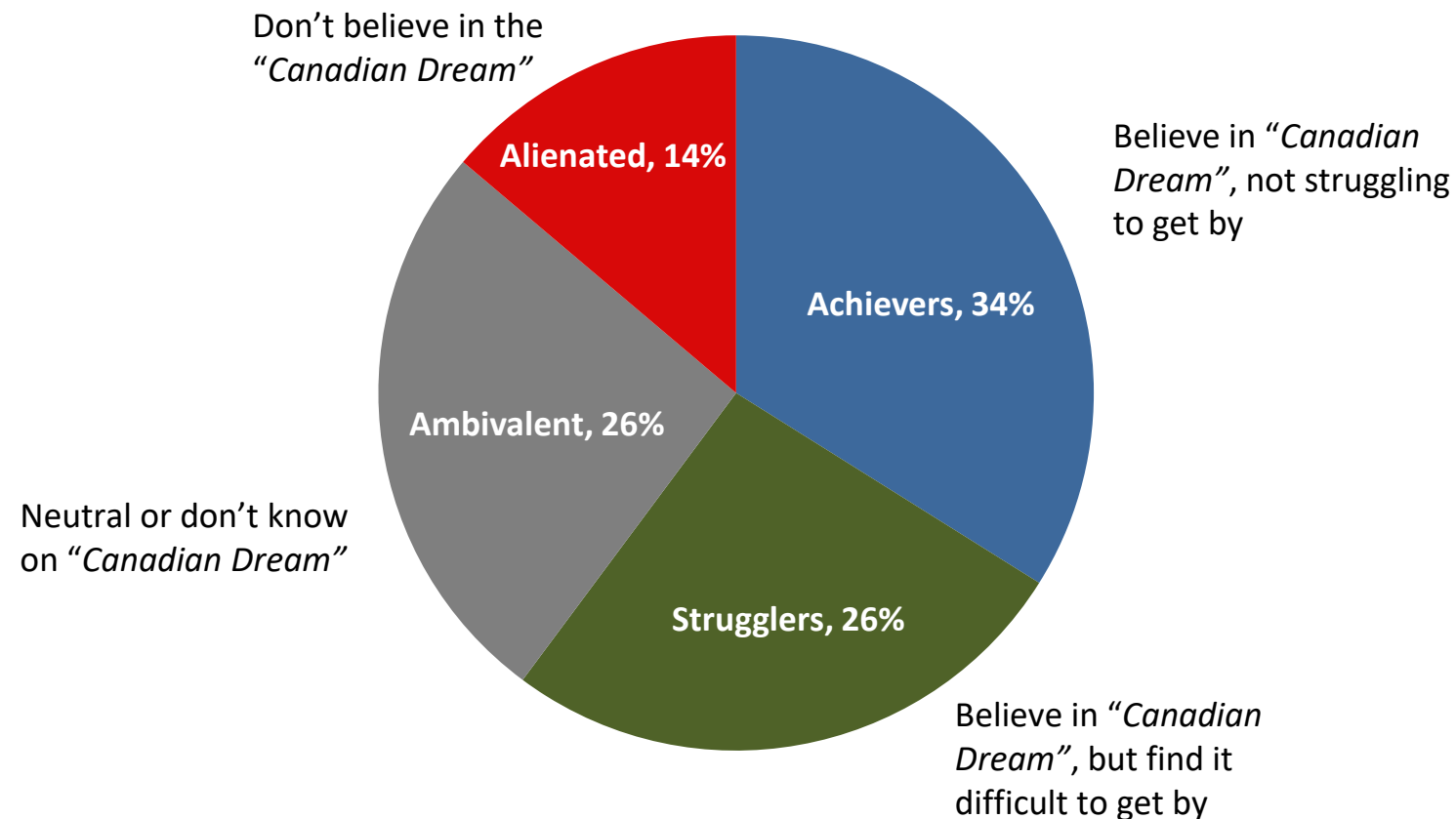
[asked of all respondents; n=300]



Economic Gap Segmentation: A plurality (34%) are Dream Achievers while 26% are Dream Strugglers

Gap segmentation: Agree with 'Here in Quebec you can be anything you want if you are willing to work for it' (*"the Canadian Dream"*) BY Agree with 'No matter how hard I work, every year it seems more difficult to get by'.

[asked of all respondents; n=300]

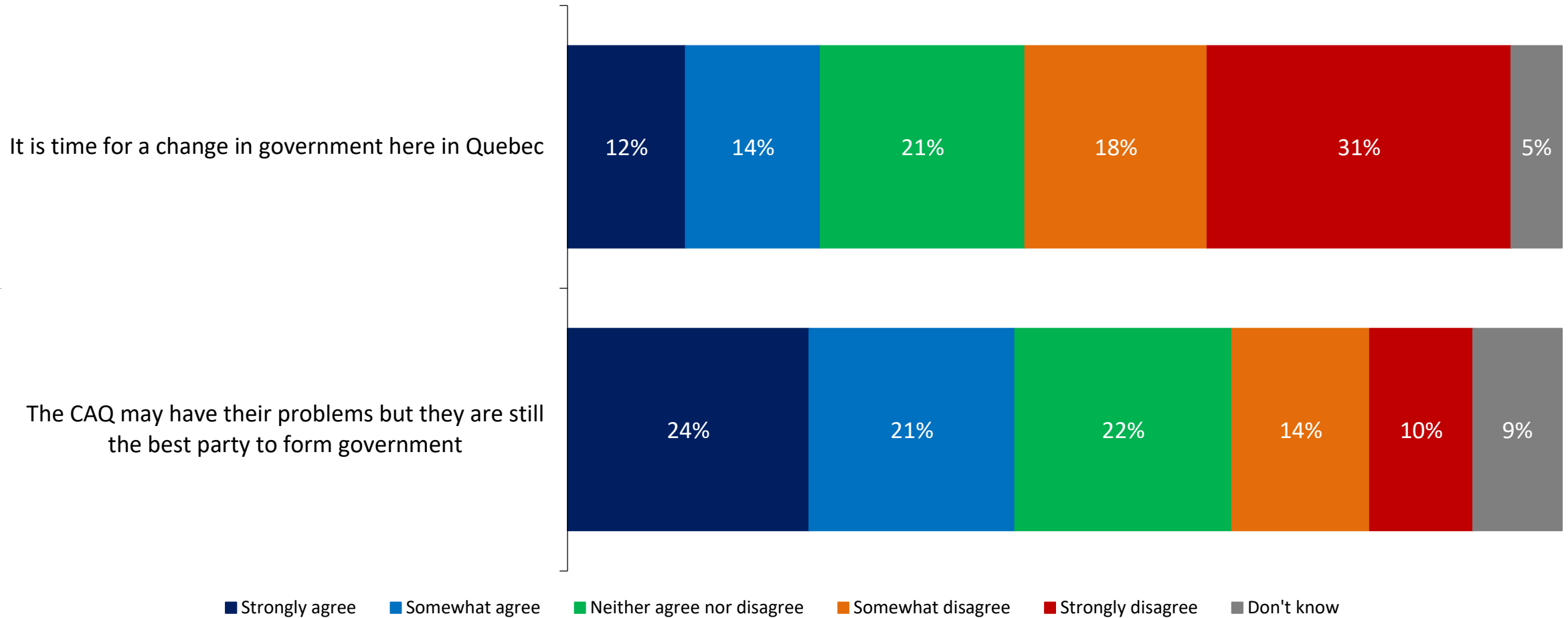


Time for Change Attitudes: One-in-three (31%) strongly disagree that it is time for a change



Do you agree or disagree with the following statements?

[asked of all respondents; n=300]

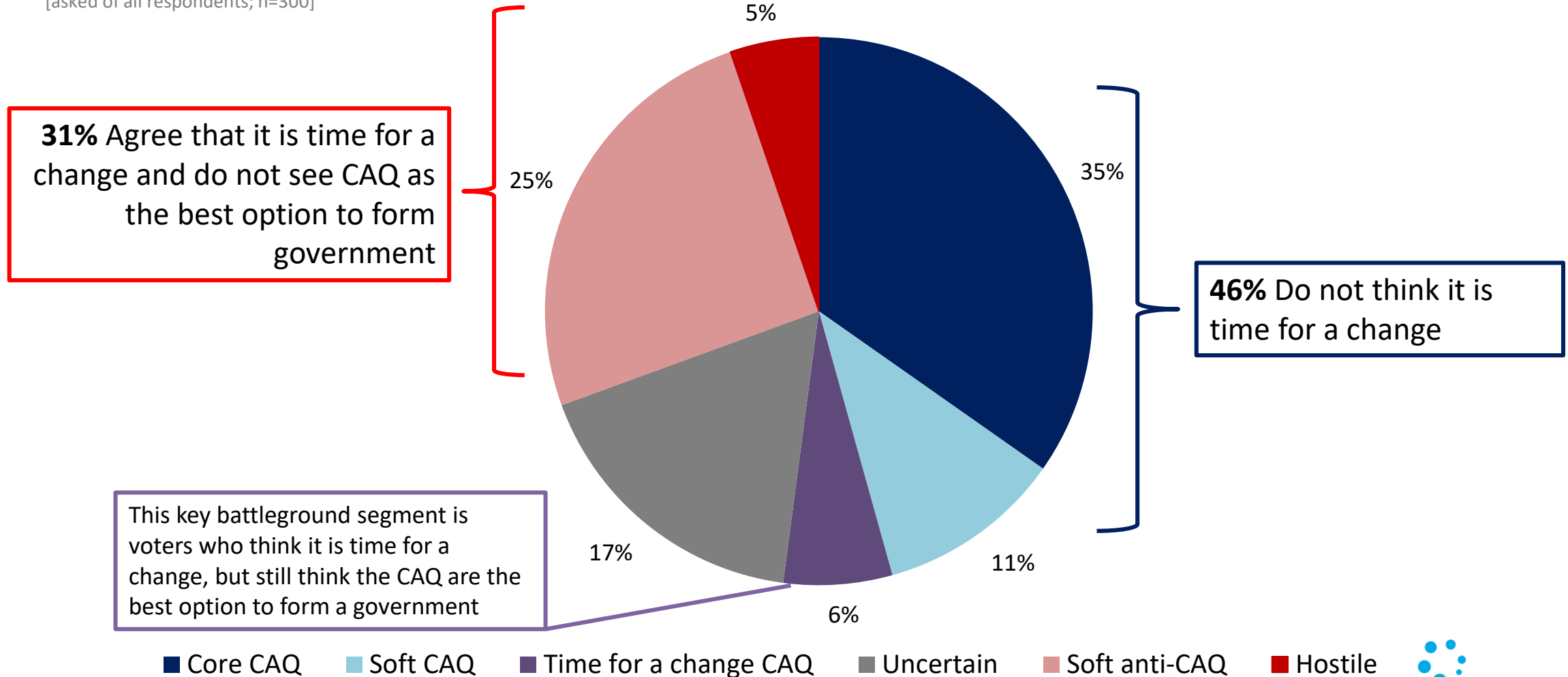


Time for Change Segmentation: More than 1-in-3 (35%) are Core CAQ supporters; only 5% are hostile ²¹



Time for Change segmentation: Agree with 'The CAQ may have their problems but they are still the best party to form government' BY Agree with 'It is time for a change in government here in Quebec'.

[asked of all respondents; n=300]



Decided Vote by Time for Change: The CAQ lead among their core voters but trail in all other groups

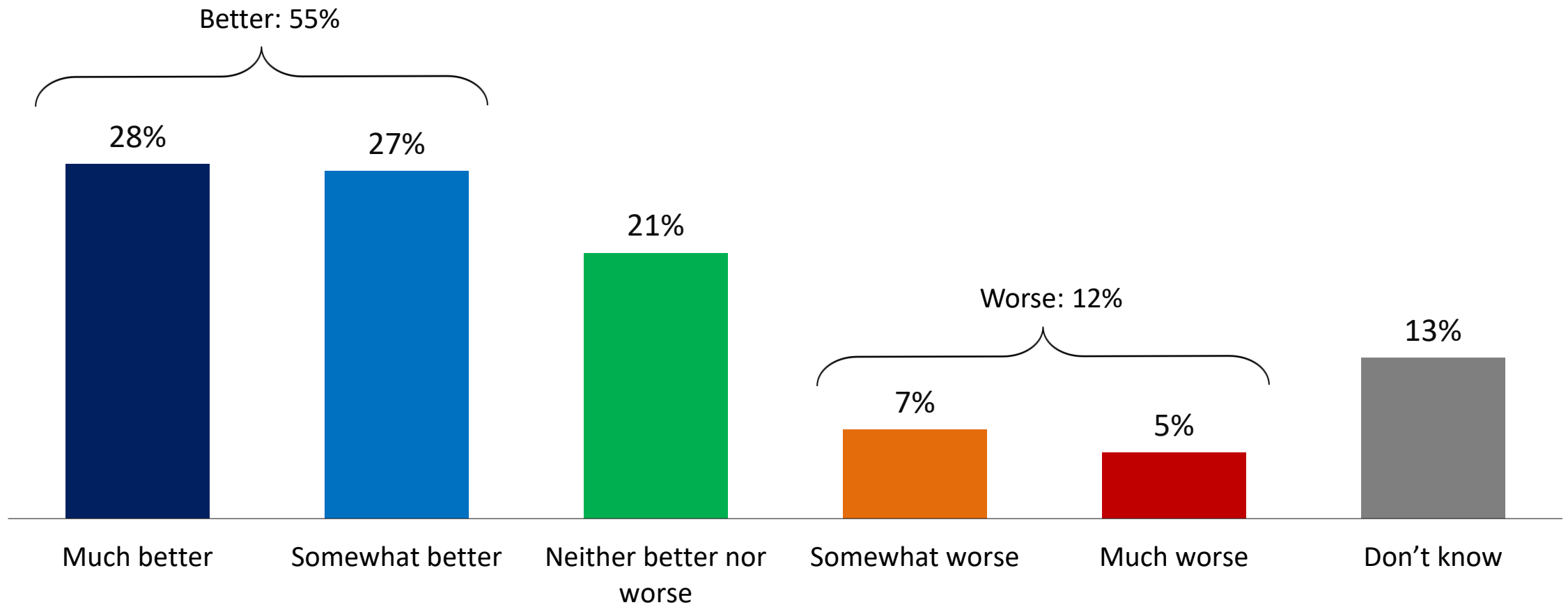
| Decided Vote | Time for Change | | | | | |
|---------------------|-----------------|-----------|------------------------|-----------|---------------|----------|
| | Core CAQ | Soft CAQ* | Time for a change CAQ* | Uncertain | Soft anti-CAQ | Hostile* |
| | (N=93) | (N=28) | (N=18) | (N=32) | (N=70) | (N=15) |
| Quebec Liberal | 7% | 34% | 55% | 43% | 46% | 73% |
| The CAQ | 77% | 14% | 21% | 16% | 8% | 3% |
| The Parti Quebecois | 14% | 28% | 8% | 23% | 19% | 0% |
| Quebec Solidaire | 1% | 8% | 8% | 10% | 13% | 19% |
| Green | 2% | 9% | 9% | 7% | 12% | 0% |
| Other | 0% | 7% | 0% | 2% | 1% | 6% |

Legault's favourability saw a large jump in March and May versus our last tracking data from 2018 and remains far ahead of other party leaders

Impact on Francois Legault: Over half (55%) say Legault's response to the outbreak has left them with a better impression of him



Has the way premier Francois Legault has responded to the COVID-19 outbreak left you with a better or worse impression of him?
[asked of all respondents, n=300]

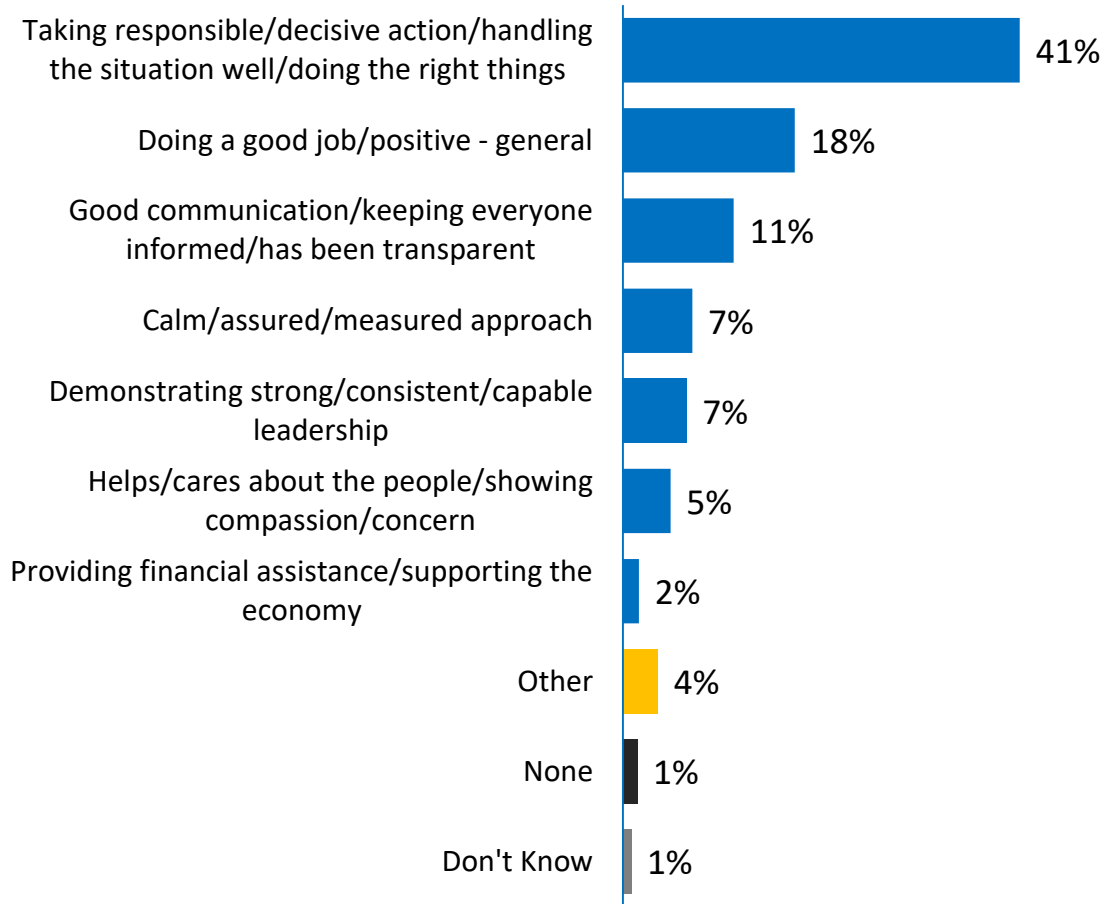


Impact on Francois Legault: 4-in-10 (41%) of those who “say better” think Legault has taken responsibility, shown decisive action



And why do you feel that way? [OPEN ENDED]

[asked of all respondents who said ‘better’, n=165]

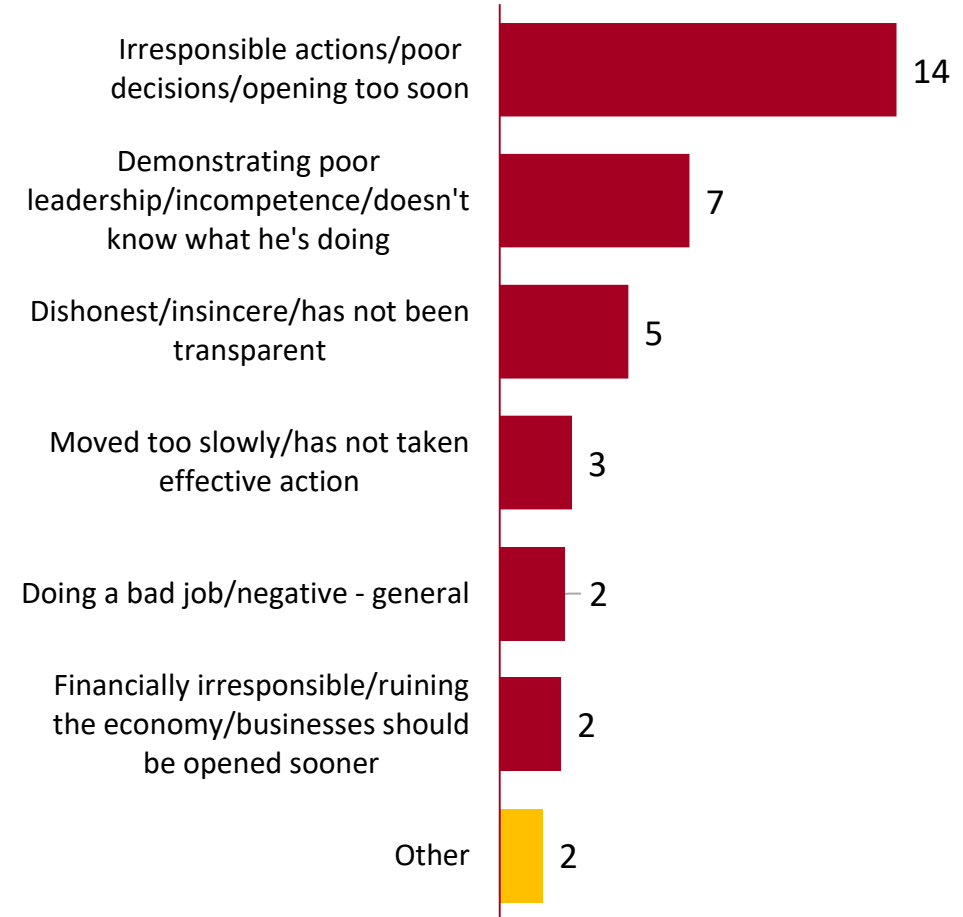


Note: Refused (4%) not shown.



And why do you feel that way? [OPEN ENDED]

[asked of all respondents who said ‘worse’, FREQUENCIES SHOWN; n=37]



Note: None/DK (<1), Refused (n=2) not shown.

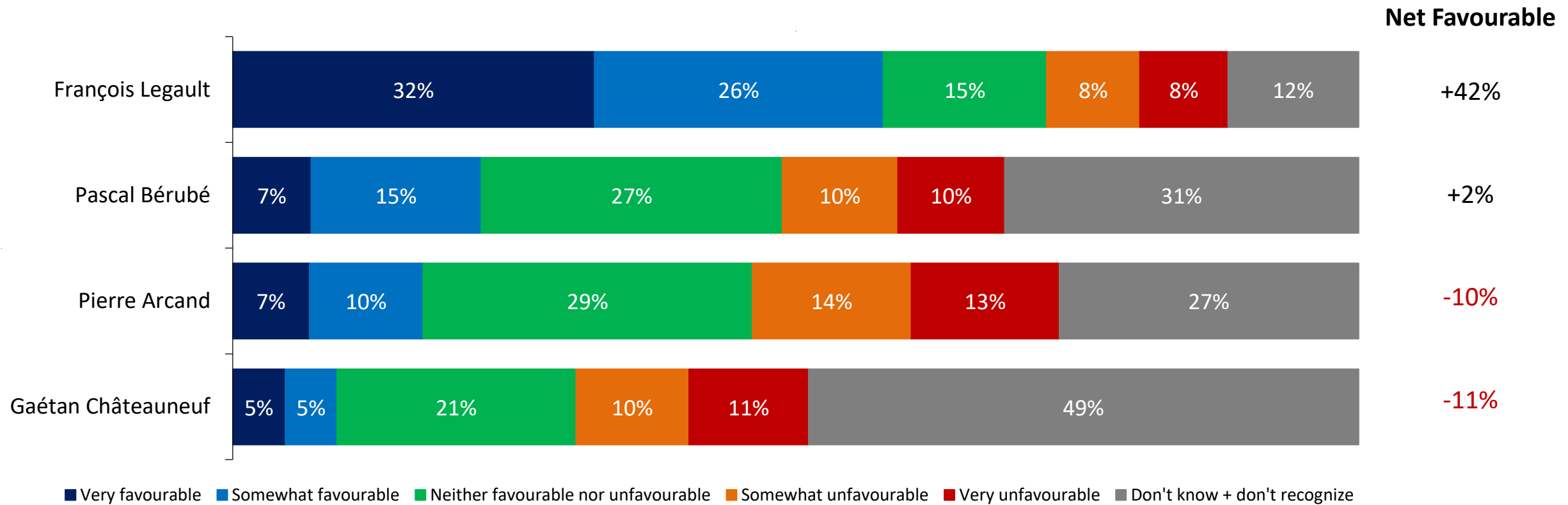
*Small n size, interpret results with caution

Leader Favourables: Of the party leaders, Legault has the highest net favourability at +42% while Châteauneuf has the lowest (-11%)



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=300]

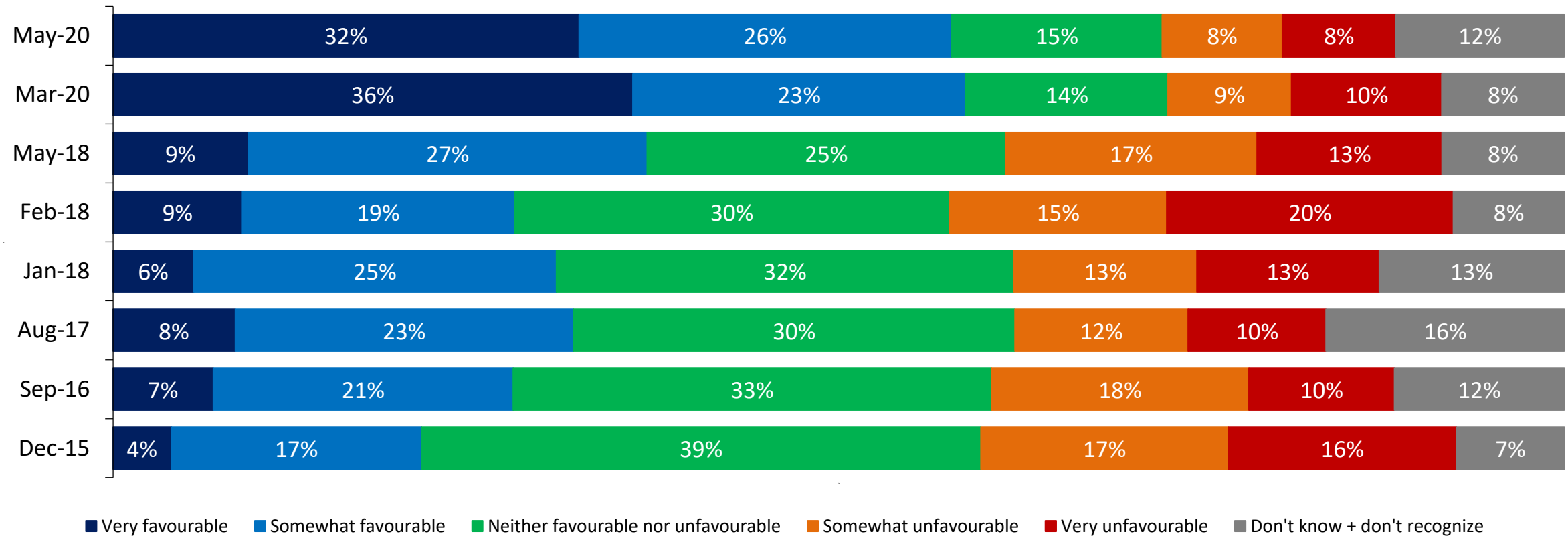


François Legault Favourability: Those who say they are favourable towards Legault saw a huge jump in March and has held steady



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=300]

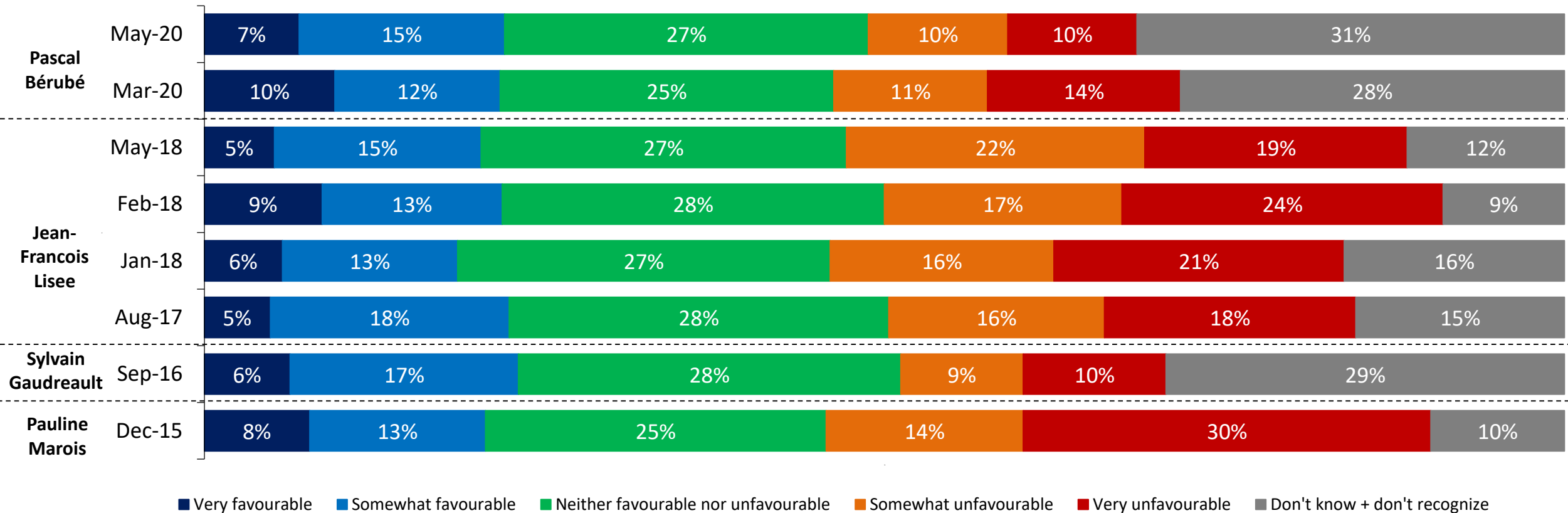


Pascal Bérubé Favourability: Favourability of Bérubé is steady since before the outbreak in 2018



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=300]

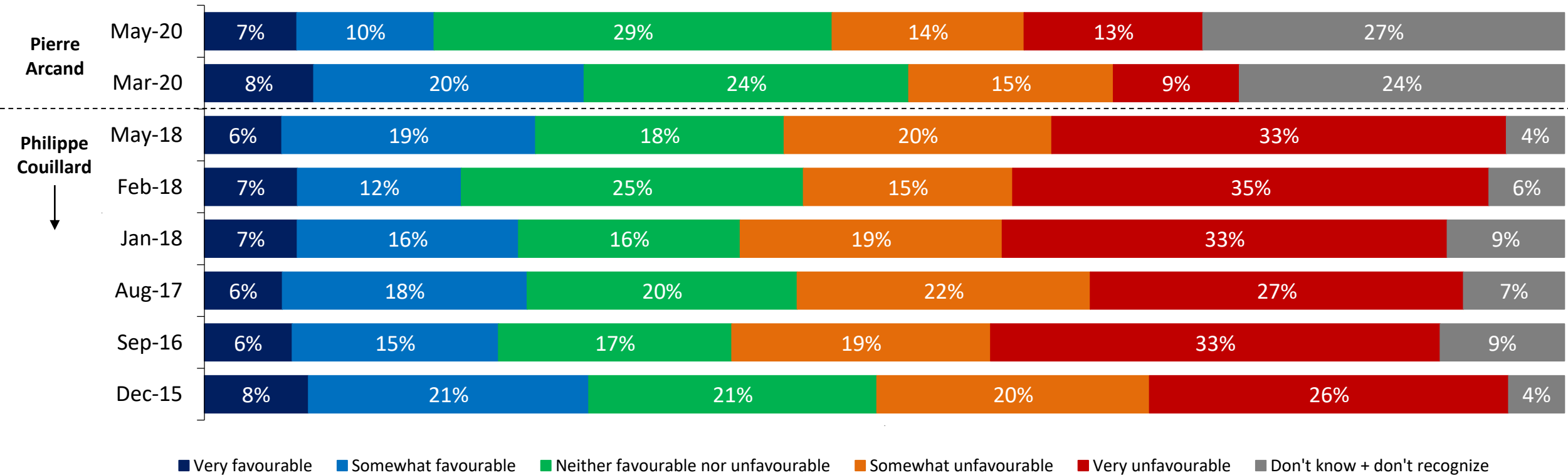


Pierre Arcand Favourability: Those favourable of Arcand down 11-pts since latest tracking; 3-in-10 (27%) are unsure



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=300]

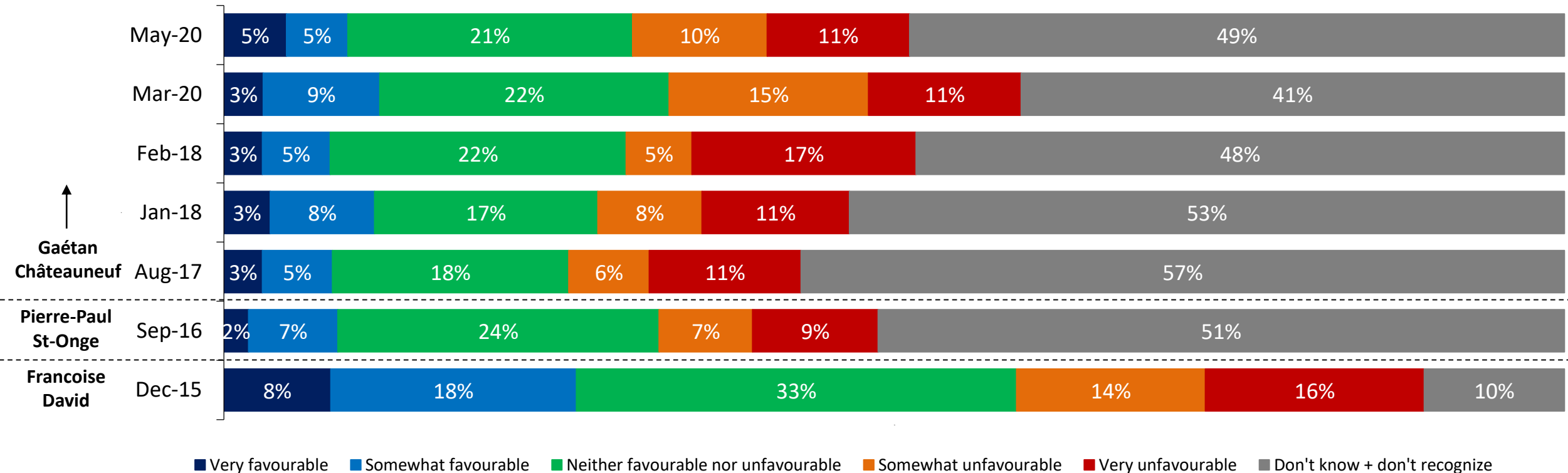


Gaétan Châteauneuf Favourability: About half (49%) don't recognize Châteauneuf or don't know how favourable they are



Below are the names of several individuals who have been mentioned in the news recently. For each one, please indicate whether you have heard of that person and, if so, whether you have a very favourable, somewhat favourable, neither favourable or unfavourable, somewhat unfavourable or very unfavourable impression of that person. If you do not recognize the name, just indicate.

[asked of all respondents; n=300]

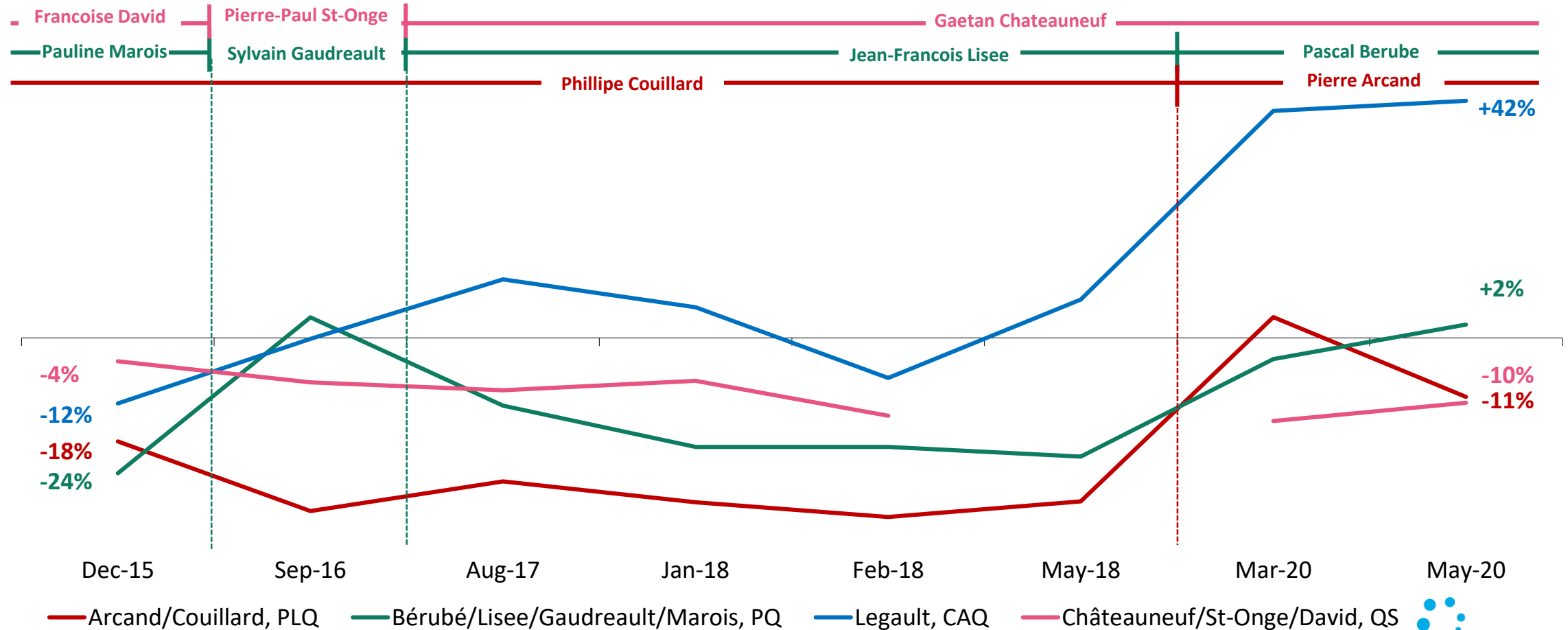


Quebec Party Leader NET Favourables Tracking: Legault remains far ahead of others leaders on net favourability (+42%)

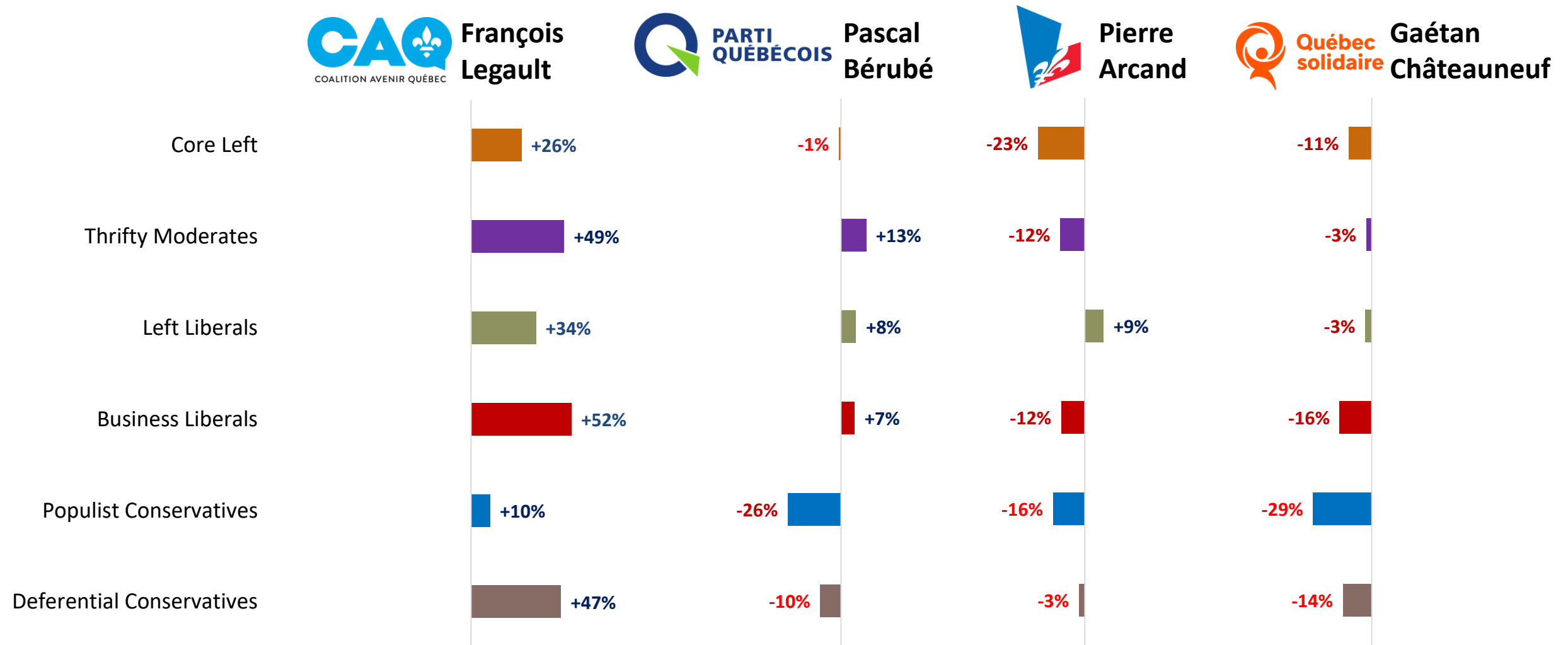


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[asked of all respondents; n=300]



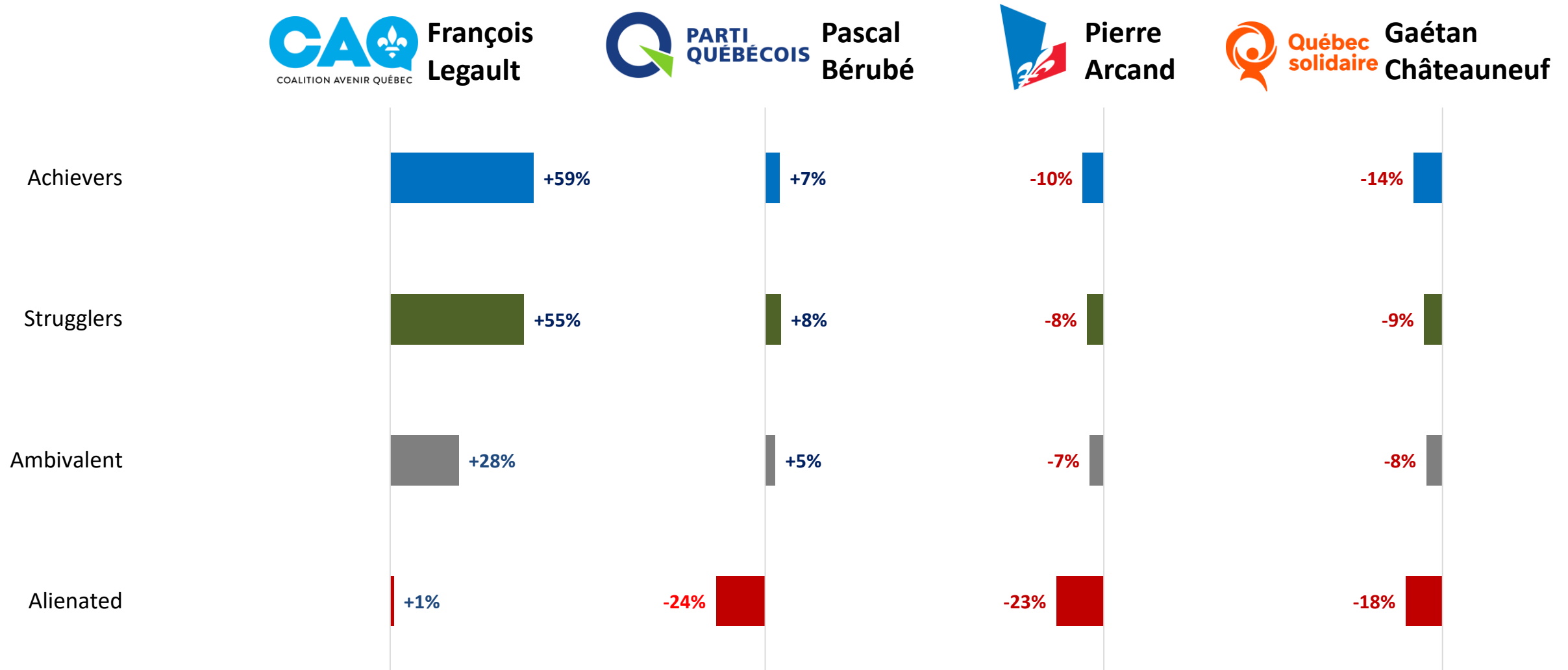
Leader favourability by Value Clusters: More Quebec'ers see Legault as favourable than unfavourable across all value clusters



NET Favourability by Value Clusters:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 6 value cluster segments.

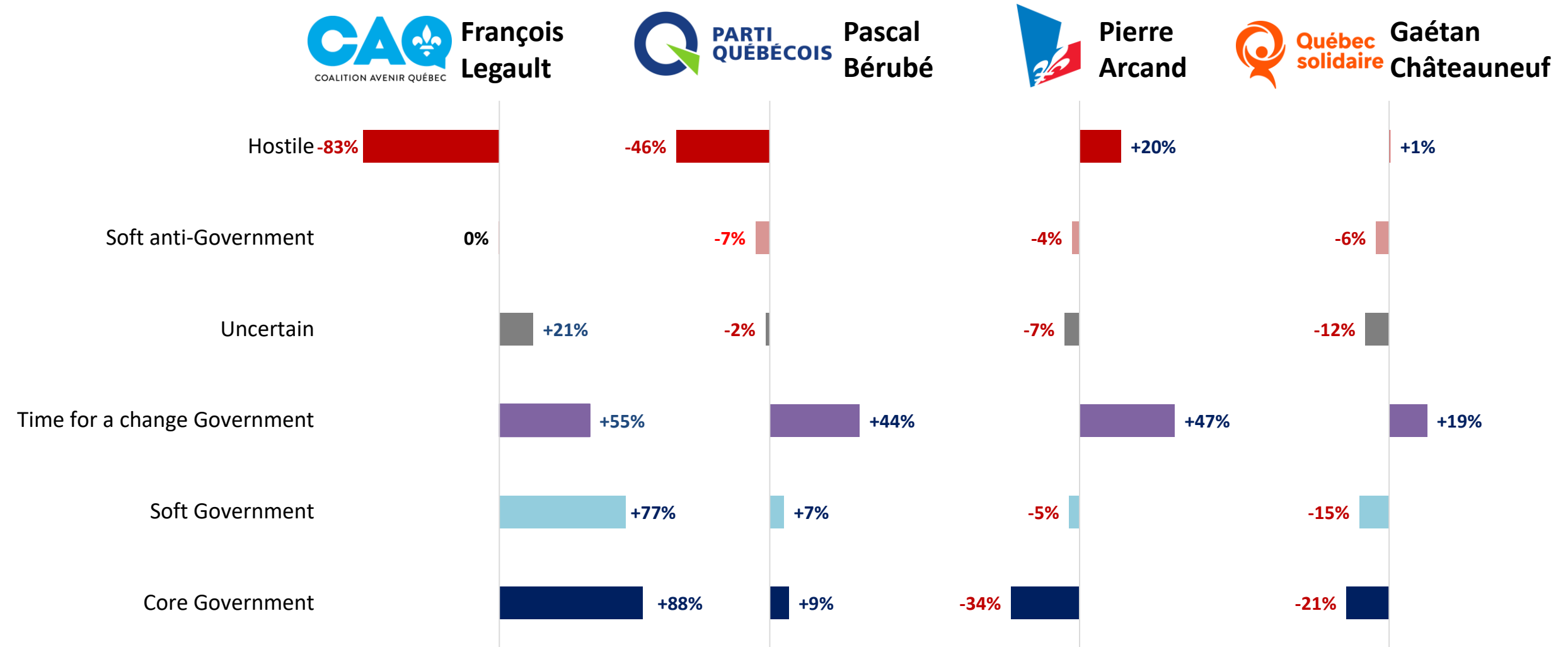
Leader favourability by Economic Gap: The only leader with net positive favourability among the alienated group is Legault



NET Favourability by Value Clusters:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 6 value cluster segments.

Leader favourability by Time for a Change: Those who are hostile towards the gov't are most favourable toward Arcand

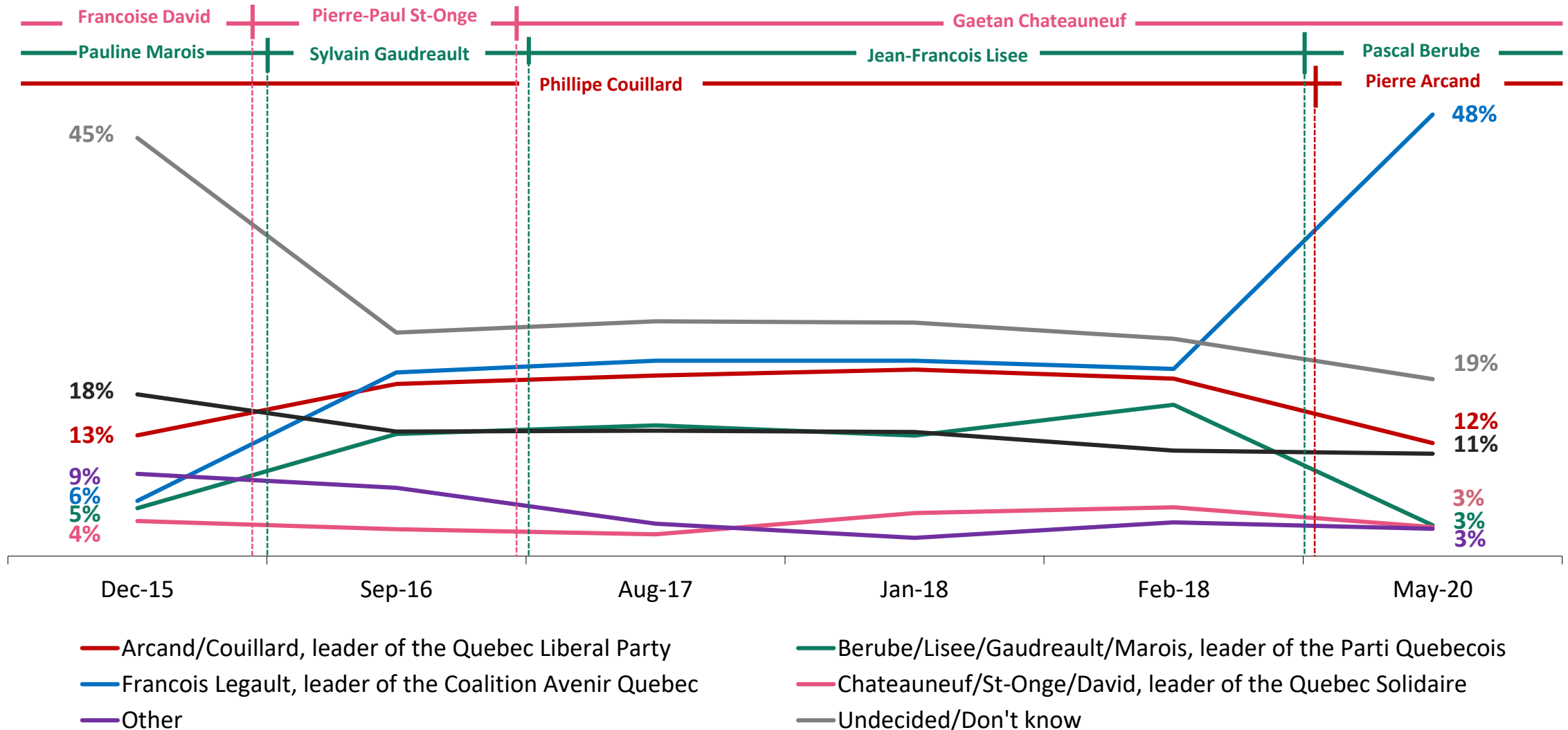


NET Favourability by Value Clusters:

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE's 6 value cluster segments.

Best Premier Tracking: Half (48%) say Legault would make the best premier, a huge increase since our latest tracking in February 2018

Q Which of the following leaders would make the best Premier of Quebec?
[asked of all respondents; n=300]



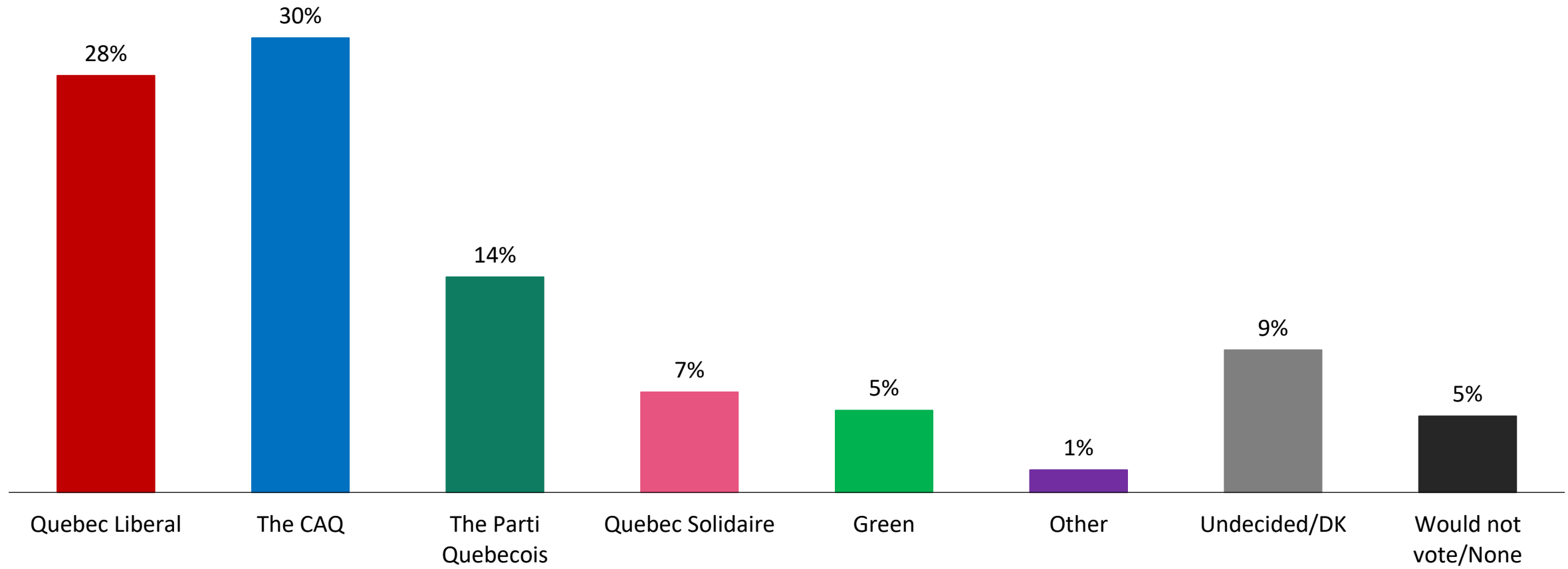
The CAQ and Liberals are neck-in-neck in vote share due to dip in support for the CAQ since April

Provincial Combined Vote: 3-in-10 (30%) say they would vote for the CAQ followed by 28% for the Quebec Liberals



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

[asked of all respondents; n=300]

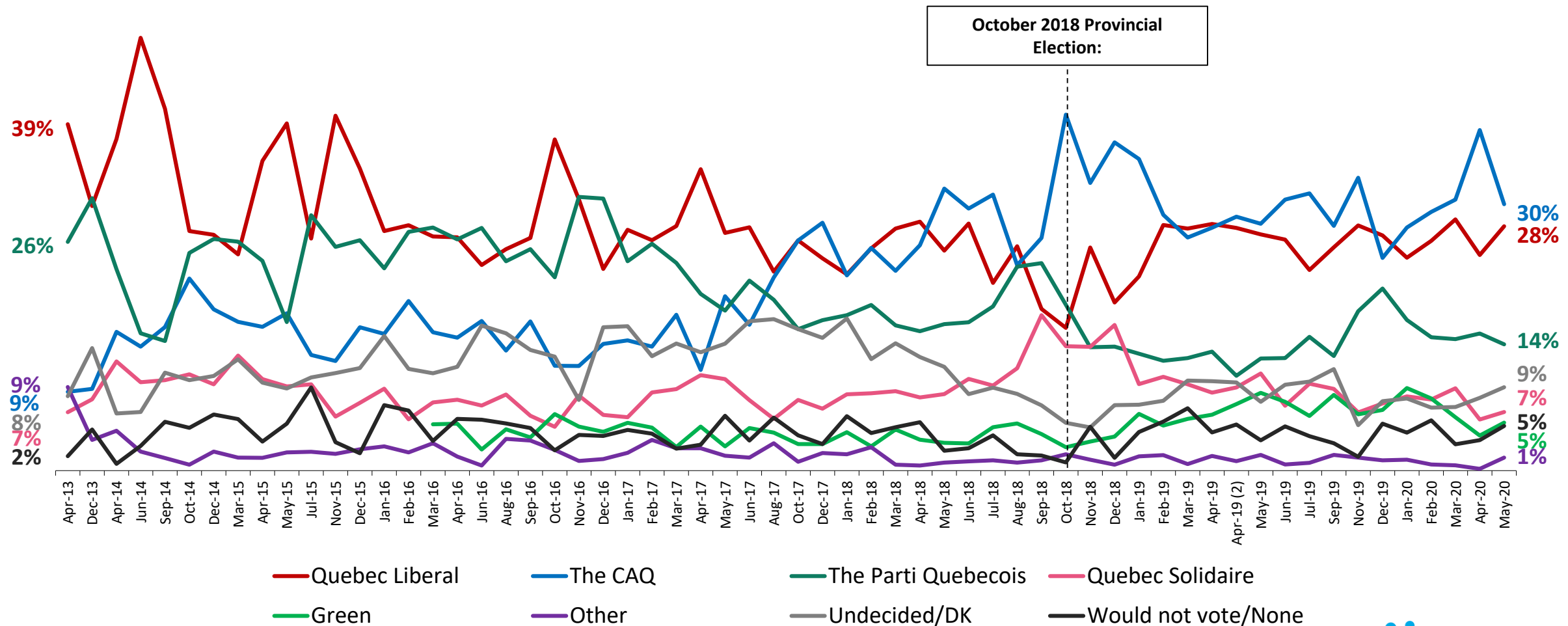


Provincial Vote Tracking: While still the highest, the CAQ's vote share is down 8-pts month-to-month to 30%, only 2-pts ahead of the QC Liberals



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

[asked of all respondents; n=300]

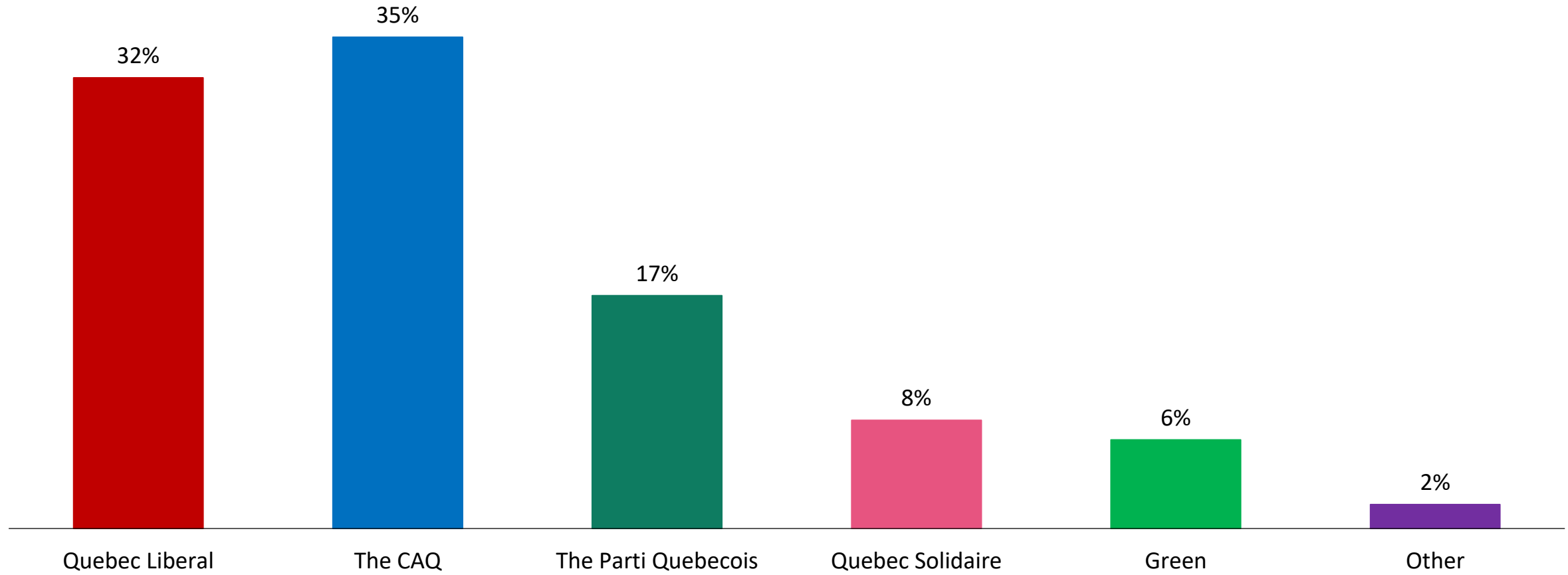


Provincial Decided Vote: The CAQ has 35% of the decided vote with the Quebec Liberals (32%) not far behind while the PQ (17%) trails



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

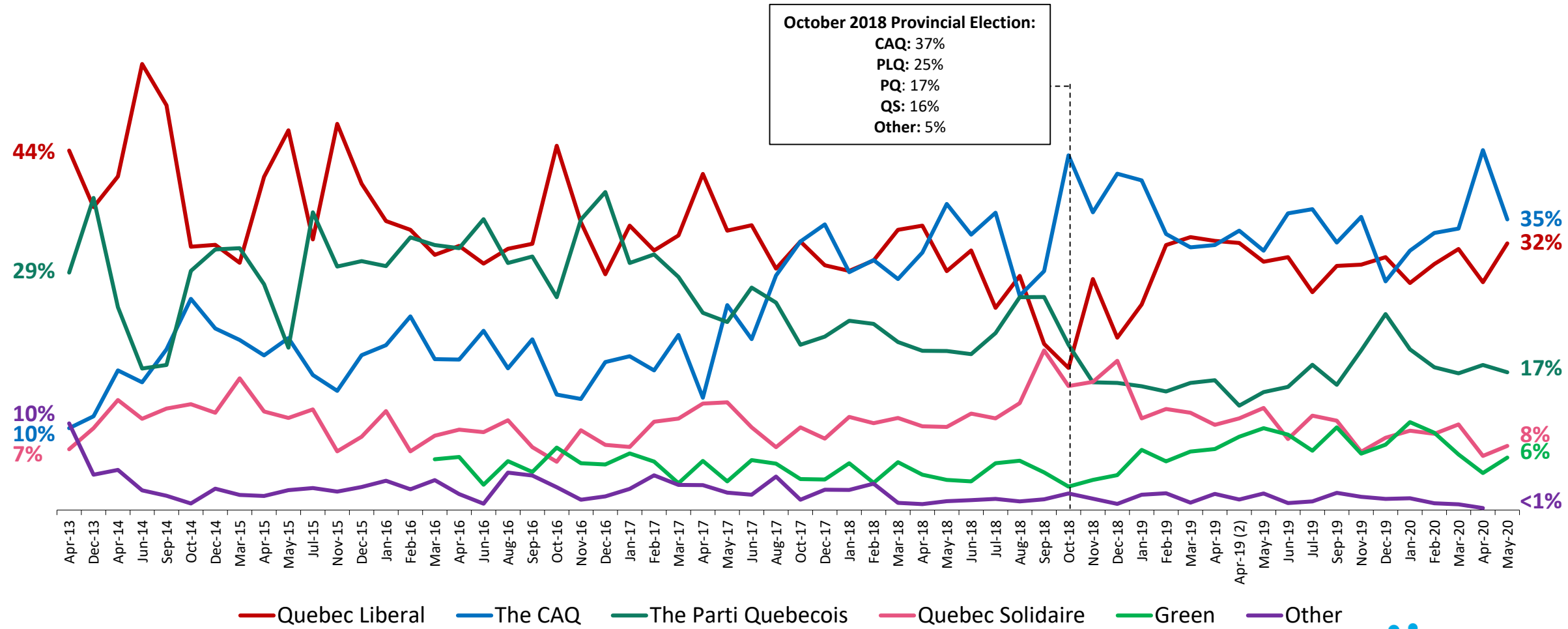
[decided voters only; n=257]



Provincial Decided Vote Tracking: The CAQ's decided vote share is down 8-pts month-to-month (35%) while QC Liberals are up directionally (32%)



If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=257]



Decided Vote by Region: Quebec Liberals lead in Anglophone Montreal (55%) while the CAQ leads in ‘Rest of QC’

Decided vote by Region

| | | Region | | |
|--------------|---------------------|-----------------------------------|----------------------|------------|
| Decided Vote | | Anglophone and Allophone Montreal | Francophone Montreal | Rest of QC |
| | | (N=41) | (N=35) | (N=180) |
| | Quebec Liberal | 55% | 33% | 27% |
| | The CAQ | 16% | 28% | 41% |
| | The Parti Quebecois | 9% | 21% | 17% |
| | Quebec Solidaire | 2% | 10% | 8% |
| | Green | 13% | 7% | 5% |
| | Other | 5% | 0% | 1% |

Note: ‘Quebec City’ and ‘Beauce’ regions combined with “Rest of Quebec” due to small sample size.

Current data: May 2020

Decided Vote by Value Cluster: Business Liberals (44%) and deferential Conservatives (45%) are most likely to vote for the CAQ

| Decided Vote | Value Clusters | | | | |
|---------------------|---------------------------|-------------------|----------------|-------------------|-----------|
| | Deferential Conservatives | Business Liberals | Left Liberals* | Thrifty Moderates | Core Left |
| | (N=41) | (N=83) | (N=27) | (N=42) | (N=50) |
| Quebec Liberal | 34% | 30% | 54% | 27% | 25% |
| The CAQ | 45% | 44% | 22% | 35% | 23% |
| The Parti Quebecois | 9% | 16% | 22% | 19% | 23% |
| Quebec Solidaire | 3% | 6% | 0% | 11% | 17% |
| Green | 7% | 4% | 3% | 5% | 12% |
| Other | 3% | 1% | 0% | 3% | 0% |

Note: Populist Conservatives (n=13) not shown due to small sample size

*Small sample sizes (n<30); treat results with caution

Current data: May 2020

Decided Vote by Economic Gap: Achievers (40%) and Strugglers (41%) alike are most likely to vote for the CAQ

| Decided Vote | Economic Gap | | | |
|---------------------|--------------|------------|------------|-----------|
| | Achievers | Strugglers | Ambivalent | Alienated |
| | (N=94) | (N=71) | (N=53) | (N=39) |
| Quebec Liberal | 30% | 33% | 31% | 37% |
| The CAQ | 40% | 41% | 27% | 23% |
| The Parti Quebecois | 20% | 13% | 20% | 11% |
| Quebec Solidaire | 4% | 7% | 13% | 10% |
| Green | 5% | 5% | 7% | 11% |
| Other | 1% | 0% | 1% | 7% |

Decided Vote by Time for Change: The CAQ lead among their core voters but trail in all other groups

| Decided Vote | Time for Change | | | | | |
|---------------------|-----------------|-----------|------------------------|-----------|---------------|----------|
| | Core CAQ | Soft CAQ* | Time for a change CAQ* | Uncertain | Soft anti-CAQ | Hostile* |
| | (N=93) | (N=28) | (N=18) | (N=32) | (N=70) | (N=15) |
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| The Parti Quebecois | 14% | 28% | 8% | 23% | 19% | 0% |
| Quebec Solidaire | 1% | 8% | 8% | 10% | 13% | 19% |
| Green | 2% | 9% | 9% | 7% | 12% | 0% |
| Other | 0% | 7% | 0% | 2% | 1% | 6% |

Note: Current data: May 2020

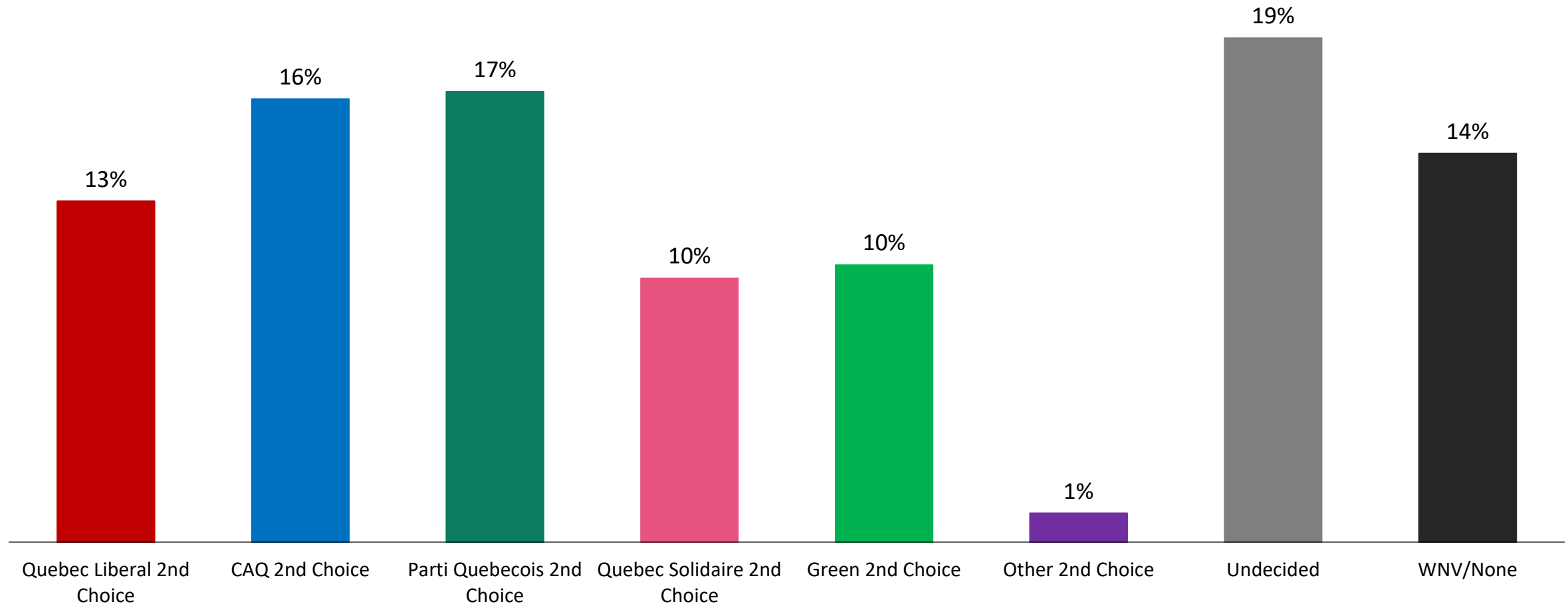
*Small sample sizes (n<30); treat results with caution.

Provincial 2nd Choice: When asked of decided voter's 2nd choice, a plurality (33%) either say they are undecided or do not have one



And which party would be your second choice?

[only decided voters; n=257]



Provincial 2nd Choice: Top 2nd choices for CAQ voters are the PQ and the QC Liberal Party; top 2nd choice for QC Liberal voters is CAQ

And which party would be your second choice? BY [Vote+Lean]

First Choice

| Second Choice | | Liberal 1st Choice | CAQ 1st Choice | Parti Quebecois 1st Choice | Quebec Solidaire 1st Choice |
|---------------|-----------------------------|--------------------|----------------|----------------------------|-----------------------------|
| | | (N=83) | (N=90) | (N=43) | (N=20)* |
| | Quebec Liberal 2nd Choice | | 23% | 12% | 7% |
| | CAQ 2nd Choice | 25% | | 42% | 9% |
| | Parti Quebecois 2nd Choice | 8% | 27% | | 37% |
| | Quebec Solidaire 2nd Choice | 6% | 12% | 13% | |
| | Green 2nd Choice | 16% | 3% | 12% | 26% |
| | Other 2nd Choice | 1% | 0% | 2% | 2% |
| | Undecided | 27% | 21% | 4% | 8% |
| | WNV/None | 17% | 13% | 15% | 11% |

Note: 'Other' and 'Green' in Combined Vote not shown due to small sample size.

*Take caution in interpreting results of Quebec Solidaire 1st choice as n<30.

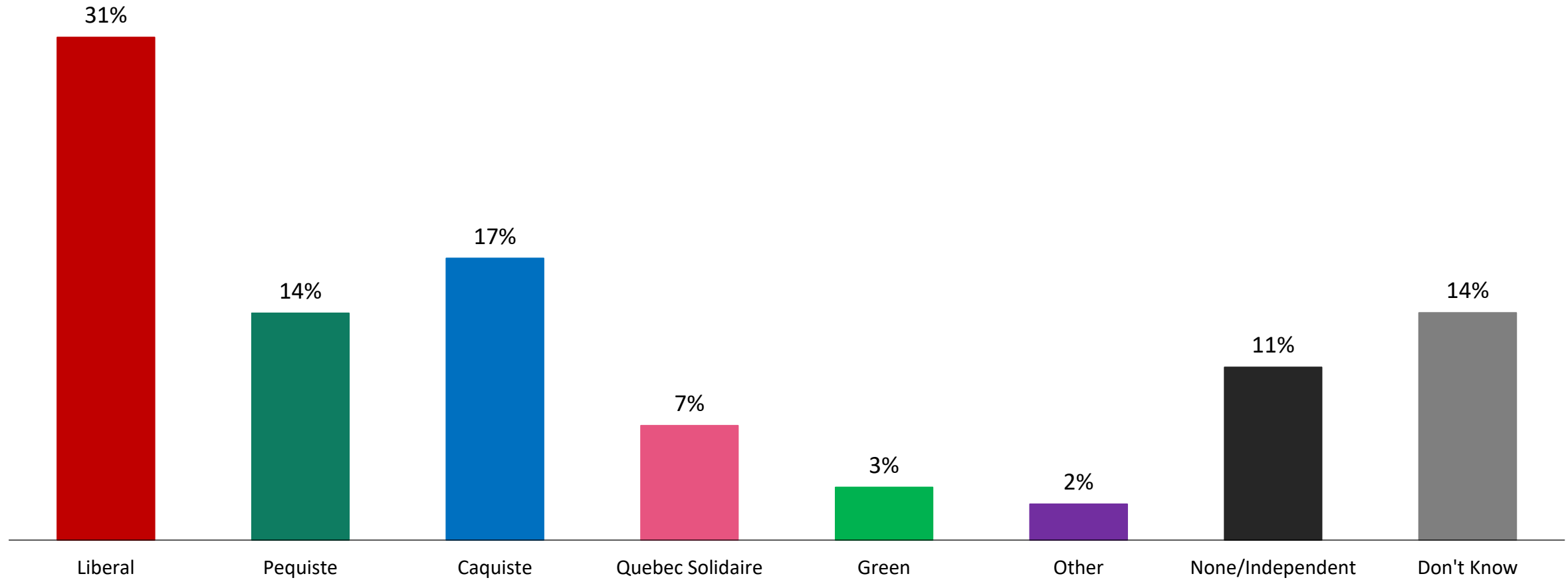
Current data: May 2020

Provincial Party ID: 3-in-10 (31%) identify as Liberals while CAQ (17%) and Pequiste (14%) trail behind



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

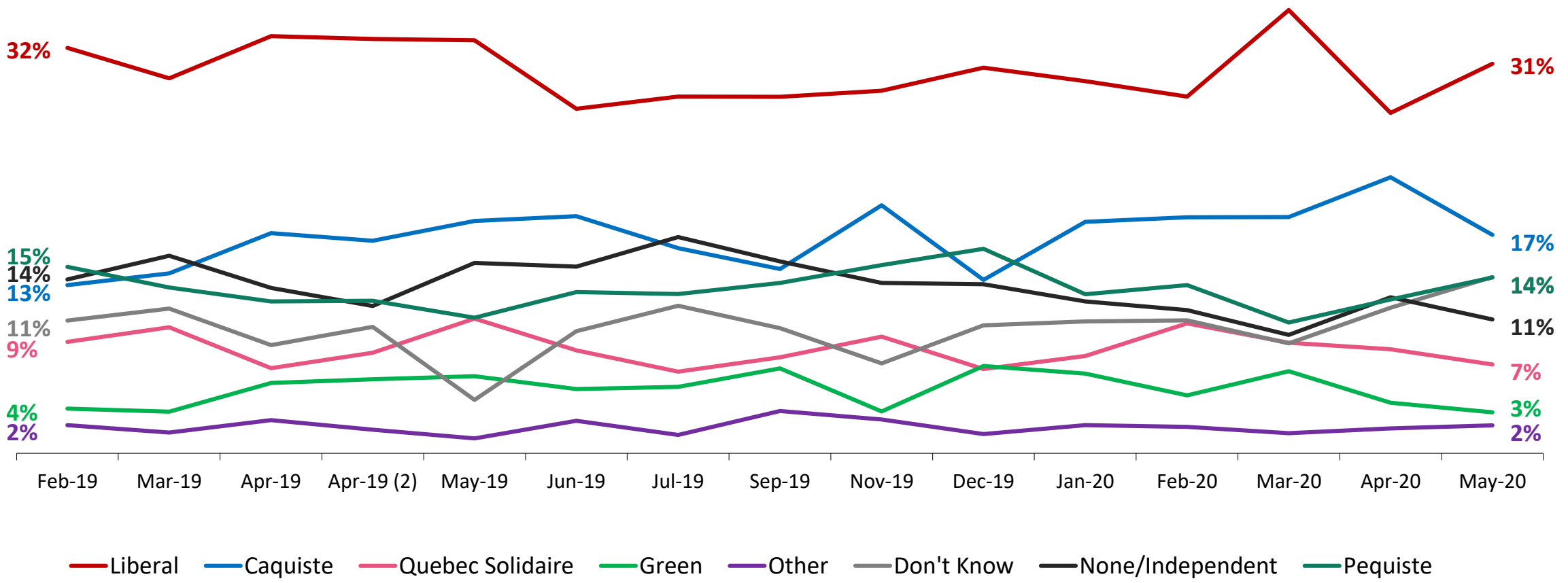
[asked of all respondents; n=300]



Provincial Party ID Tracking: Liberal party identification (31%) is up 4-pts directionally month-to-month while the CAQ is down 5-pts directionally



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



Combined Vote by Party ID: CAQ partisans are the most loyal with 82% of their vote share going to the CAQ

| | | Provincial Party Identification | | | | |
|--------------------------|---------------------|---------------------------------|----------|----------|------------------|-----------|
| | | Liberal | Pequiste | Caquiste | Quebec Solidaire | Unaligned |
| | | (N=93) | (N=42) | (N=52) | (N=21)* | (N=74) |
| Provincial Combined Vote | Quebec Liberal | 68% | 3% | 5% | 17% | 13% |
| | The Parti Quebecois | 3% | 57% | 10% | 17% | 17% |
| | The ADQ/CAQ | 17% | 35% | 82% | 11% | 5% |
| | Quebec Solidaire | 3% | 3% | 0% | 53% | 5% |
| | Green | 5% | 2% | 0% | 2% | 6% |
| | Other | 1% | 0% | 0% | 0% | 2% |
| | Undecided/DK | 3% | 0% | 3% | 0% | 32% |
| | Would not vote/None | 0% | 0% | 0% | 0% | 20% |

Methodology

Survey Methodology

These are the results of an online survey conducted between May 1st and May 5th, 2020.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. 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.

Sample Size: n=433 Quebec residents, 18 years or older. The results are weighted to n=300 based on Census data from Statistics Canada.

Field Dates: May 1st and May 5th, 2020.

Weighting: Results for Quebec 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.

Margin of Error: 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.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

| | Unweighted (n) | Unweighted (%) | Weighted (n) | Weighted (%) |
|--|-------------------|-------------------|-----------------|-----------------|
| Males 18-34 | 54 | 12.5% | 39 | 12.9% |
| Males 35-54 | 78 | 18% | 50 | 16.7% |
| Males 55+ | 95 | 21.9% | 57 | 19.1% |
| Females 18-34 | 65 | 15% | 38 | 12.8% |
| Females 35-54 | 66 | 15.2% | 50 | 16.7% |
| Females 55+ | 75 | 17.3% | 65 | 21.8% |
| | | | | |
| Anglophone and Allophone Montreal | 95 | 21.9% | 47 | 15.7% |
| Francophone Montreal | 65 | 15% | 41 | 13.7% |
| Quebec City | 22 | 5.1% | 23 | 7.6% |
| Beauce | 21 | 4.8% | 17 | 5.6% |
| Rest of QC | 230 | 53.1% | 172 | 57.4% |

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Building Understanding.

