Federal Politics in the time of COVID-19

The COVID-19 outbreak has set off a series of changes in the Canadian political landscape. Federally, approval of the government’s handling of the pandemic has been rising, which has translated to the highest government satisfaction that we’ve seen in years. Though approval of the government’s handling of COVID-19 has remained stable, general satisfaction with the federal government has been declining since May. Even so, Trudeau maintains his lead as the best option for Prime Minister of Canada and the Liberals maintain their lead in vote.

Today, INNOVATIVE is releasing results from our July 2020 Canada This Month survey. This online survey was in field from July 14th to July 20th with a weighted sample size of 2,000 and oversamples in Alberta and BC. Detailed methodology is provided in the appendix.

This report covers key results on how Canadians are rating the Federal government’s handling of COVID-19 and the impacts that is having for government satisfaction and vote choice.
Government Approval

The federal government continues to receive high marks, both generally and for their handling of COVID-19 specifically.
Federal Satisfaction: A majority (54%) report they are satisfied with the performance of the federal government

Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada? Would you say you are...?
[asked of all respondents; n=2,000]

- **Satisfied:** 54%
- **Dissatisfied:** 41%
- **Very satisfied:** 15%
- **Somewhat satisfied:** 39%
- **Somewhat dissatisfied:** 20%
- **Very dissatisfied:** 21%
- **Don't know:** 5%

Current data: July 2020
Federal Satisfaction Tracking: From a record high of +26% in May, net satisfaction with the federal gov’t is down 13 points to +13% in July

Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada? Would you say you are...
[asked of all respondents; n=2,000]

Current data: July 2020
COVID-19 Handling: More than 6-in-10 (63%) approve of the federal government’s handling of the outbreak

Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?
[asked of all respondents; n=2,000]

Approve: 63%

- Strongly approve: 25%
- Somewhat approve: 37%
- Neither approve nor disapprove: 13%
- Somewhat disapprove: 10%
- Strongly disapprove: 11%
- Don’t know: 4%

Current data: July 2020
COVID-19 Handling Tracking: Most approve of federal government’s handling of the situation; net satisfaction increased slightly since June

Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?

[asked of all respondents; n=2,000]

Current data: July 2020
Read, Seen, Heard
A majority have heard something about the government, and among those, impression is mostly negative. This is largely driven by the negative impressions left on those who recall the WE charity scandal.
Read, Seen, Heard Tracking: Over 6-in-10 (62%) recall something about the federal government, up 5 points month-to-month

Have you read, seen or heard anything about Canada's Prime Minister and the Federal government in the last few days?
[asked of all respondents; n=2,000]

Note: Don’t know not shown.
Current data: July 2020.
Federal Read, Seen, Heard, Impact Tracking: Impact of RSH has been trending negatively over the past few months

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 Canada's Prime Minister and the Federal government?

[asked of those who have RSH; n=1235]

Note: Don’t know not shown.
Current data: July 2020.
Note: in May ’18, this question is asked of all respondents except those in Ontario.
Federal Read, Seen, Heard: Over 6-in-10 (62%) have RSH about the federal government; mostly leading to a less favourable impression

Have you read, seen or heard anything about Canada’s Prime Minister and the Federal government in the last few days?  
[Asked of those who have RSH; n=2000]

- Yes: 62%
- No: 38%

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 Canada’s Prime Minister and the Federal government?  
[Asked of those who have RSH; n=1235]

- A lot more favourable: 7%
- Somewhat more favourable: 10%
- Made no difference: 29%
- Somewhat less favourable: 25%
- A lot less favourable: 30%

Less Favourable: 55%
More Favourable: 17%

Current data: July 2020
Over 7-in-10 (72%) recall the WE charity controversy and among those that mention it, impact is strongly negative (-60% net favourability)

And what have you read, seen or heard about Canada’s Prime Minister and the Federal government in the last few days? Please be specific.

[Asked of those who have RSH; n=1,235]

<table>
<thead>
<tr>
<th>Impact by RSH</th>
<th>More fav.</th>
<th>No Difference</th>
<th>Less fav.</th>
<th>NET</th>
</tr>
</thead>
<tbody>
<tr>
<td>The WE charity controversy</td>
<td>72%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>COVID-19 - general (briefings/accouncements, etc.)</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trudeau’s apology for the WE scandal</td>
<td>7%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Continued border closure/extension</td>
<td>5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Extension of COVID-19 financial support: CERB/CEWS</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student volunteer/employment program connected to WE scandal</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General negative comment re: Trudeau/Federal government</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trudeau should have recused himself from cabinet (WE)</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Canada’s deficit and debt</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General positive comment re: Trudeau/Federal government</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aid given to provinces from Federal govt</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trudeau refused trade meeting/relationship with Trump</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refused</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

‘Other’ includes:
- A news report/article general
- NBC broadcasting NHL game

Note: Impact shown only for responses with a weighted sample size of n>30
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 analyze vote leadership results.
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=2,000]

- Their ability to afford the programs and services: 33%
- The public's need for the programs and services: 54%
- Don't know: 14%

Is the main role of government to...

[asked of all respondents; n=2,000]

- To create equal opportunity so that everyone can compete on their own to be the best they can be: 57%
- To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own: 32%
- Don't know: 11%

Which of the following statements comes closest to your view?

[asked of all respondents; n=2,000]

- The profit system brings out the worst in human nature: 39%
- The profit system teaches people the value of hard work and success: 44%
- Don't know: 17%

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

[asked of all respondents; n=2,000]

- Too often the government listens to experts instead of common sense: 40%
- Provincial issues are complicated so government should listen to experts when it comes to policy: 45%
- Don't know: 15%

Current data: July 2020
Value Clusters: Conservative clusters are smallest, 1-in-4 (25%) categorized as Business Liberals

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=2,000]
Defining Value Clusters: Conservative clusters much more likely to feel role of government is to create equal opportunity

Core Political Values by Value Clusters

<table>
<thead>
<tr>
<th>Column %</th>
<th>Deferential Conservatives</th>
<th>Populist Conservatives</th>
<th>Business Liberals</th>
<th>Left Liberals</th>
<th>Thrifty Moderates</th>
<th>Core Left</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governments should base decisions on...</td>
<td>Ability to afford</td>
<td>86%</td>
<td>93%</td>
<td>0%</td>
<td>0%</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>Public Need</td>
<td>0%</td>
<td>0%</td>
<td>95%</td>
<td>90%</td>
<td>0%</td>
</tr>
<tr>
<td>Is the main role of government to...</td>
<td>Create equal Opportunity</td>
<td>78%</td>
<td>98%</td>
<td>69%</td>
<td>98%</td>
<td>30%</td>
</tr>
<tr>
<td></td>
<td>Redistribute wealth</td>
<td>16%</td>
<td>0%</td>
<td>22%</td>
<td>0%</td>
<td>31%</td>
</tr>
<tr>
<td>When it comes to government decision making...</td>
<td>Rely on common sense</td>
<td>0%</td>
<td>100%</td>
<td>34%</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td></td>
<td>Listen to experts</td>
<td>92%</td>
<td>0%</td>
<td>55%</td>
<td>39%</td>
<td>22%</td>
</tr>
<tr>
<td>The profit system...</td>
<td>Brings out the worst in human nature</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>81%</td>
<td>57%</td>
</tr>
<tr>
<td></td>
<td>Teaches value of hard work and success</td>
<td>89%</td>
<td>93%</td>
<td>90%</td>
<td>0%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Note: Current data: July 2020
A majority of Canadians feel 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=2,000]

Here in [PROV] you can be anything you want if you are willing to work for it

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>22%</td>
<td>35%</td>
<td>17%</td>
<td>13%</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Strongly agree</th>
<th>Somewhat agree</th>
<th>Neither agree nor disagree</th>
<th>Somewhat disagree</th>
<th>Strongly disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>29%</td>
<td>22%</td>
<td>14%</td>
<td>12%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Economic Gap Segmentation: 3-in-10 (31%) do not struggle financially and our optimistic about personal opportunities in their province

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=2,000]

- Achievers, 31%
- Strugglers, 26%
- Ambivalent, 21%
- Alienated, 21%

Believe in “Canadian Dream”, not struggling to get by

Believe in “Canadian Dream”, but find it difficult to get by

Don’t believe in “Canadian Dream”

Neutral or don’t know on “Canadian Dream”

Current data: July 2020
Time for Change Tracking: Net ‘time for a change’ sentiment has increased 5 points month-to-month, from +16% in June to +21% in July

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=2,000]
Best Party for Government Tracking: Net agreement that the Liberals are the best party has dropped 11 points from +16% in June to +6%

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=2,000]
Time for Change Segmentation: 1-in-10 (10%) feel the Liberals are still the best party for government, but that it’s time for a change.
Leadership

Despite a slight drop in net favourability compared to June, Trudeau shows a dominant lead over Scheer on being the best candidate for Prime Minister.
Leader Favourables: Trudeau shows the strongest net favourability among all candidates, while Scheer elicits a strongly negative reaction.

Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=2,000]

<table>
<thead>
<tr>
<th>Public Figure</th>
<th>Very favourable</th>
<th>Somewhat favourable</th>
<th>Neutral/Neither favourable</th>
<th>Somewhat unfavourable</th>
<th>Very unfavourable</th>
<th>Do not recognize</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Trudeau</td>
<td>17%</td>
<td>25%</td>
<td>15%</td>
<td>13%</td>
<td>26%</td>
<td>1%</td>
</tr>
<tr>
<td>Andrew Scheer</td>
<td>6%</td>
<td>12%</td>
<td>19%</td>
<td>17%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>Peter MacKay</td>
<td>6%</td>
<td>13%</td>
<td>26%</td>
<td>16%</td>
<td>15%</td>
<td>12%</td>
</tr>
<tr>
<td>Erin O'Toole</td>
<td>4%</td>
<td>10%</td>
<td>23%</td>
<td>11%</td>
<td>14%</td>
<td>24%</td>
</tr>
<tr>
<td>Jagmeet Singh</td>
<td>12%</td>
<td>23%</td>
<td>23%</td>
<td>14%</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>Yves-Francois Blanchet</td>
<td>14%</td>
<td>17%</td>
<td>20%</td>
<td>11%</td>
<td>14%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Current data: July 2020
Party Leader NET Favourables Tracking: Gap in net favourability between Trudeau (+3) and Scheer (-34) now at 38 points

Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=2,000]

Note: Green Leader, People’s Party Leader not shown.

Current data: July 2020

Note: Results for Yves-Francois Blanchet for Quebec respondents only
Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=2,000]
Leader favourability by value clusters: Populist Conservatives have a net negative impression of all leaders except Scheer

<table>
<thead>
<tr>
<th>Value Cluster</th>
<th>Justin Trudeau</th>
<th>Andrew Scheer</th>
<th>Jagmeet Singh</th>
<th>Yves-François Blanchet*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Left</td>
<td>+26%</td>
<td>-69%</td>
<td>+41%</td>
<td>+5%</td>
</tr>
<tr>
<td>Thrifty Moderates</td>
<td>-7%</td>
<td>-19%</td>
<td>+2%</td>
<td>+6%</td>
</tr>
<tr>
<td>Left Liberals</td>
<td>+22%</td>
<td>-44%</td>
<td>+22%</td>
<td>-2%</td>
</tr>
<tr>
<td>Business Liberals</td>
<td>+20%</td>
<td>-39%</td>
<td>+5%</td>
<td>+9%</td>
</tr>
<tr>
<td>Populist Conservatives</td>
<td>-63%</td>
<td>0%</td>
<td>-54%</td>
<td>-17%</td>
</tr>
<tr>
<td>Deferential Conservatives</td>
<td>-12%</td>
<td>-13%</td>
<td>-22%</td>
<td>+6%</td>
</tr>
</tbody>
</table>

**NET Favourability by Value Clusters:**
Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE’s 6 value cluster segments.
*Results for Yves-François Blanchet are from Quebec only.
Leader favourability by Economic Gap: Scheer has strongly negative net favourability among all groups

Achievers
- Justin Trudeau: +0%
- Andrew Scheer: -36%
- Jagmeet Singh: -10%
- Yves-François Blanchet*: +18%

Strugglers
- Justin Trudeau: +4%
- Andrew Scheer: -10%
- Jagmeet Singh: +5%
- Yves-François Blanchet*: +11%

Ambivalent
- Justin Trudeau: +4%
- Andrew Scheer: -36%
- Jagmeet Singh: +7%
- Yves-François Blanchet*: -12%

Alienated
- Justin Trudeau: +6%
- Andrew Scheer: -60%
- Jagmeet Singh: +20%
- Yves-François Blanchet*: -19%

NET Favourability by Economic Gap:
Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE’s 4 economic gap segments.
*Results for Yves-François Blanchet are from Quebec only.
Leader favourability by Time for a Change: Trudeau has a positive net favourability among ‘Time for Change’ Liberals

Each chart shows the net favourability (% favourable minus % unfavourable) for each leader within INNOVATIVE’s 6 time for a change segments. *Results for Yves-François Blanchet are from Quebec only.
Which of the following party leaders would make the best Prime Minister of Canada?

[asked of all respondents; n=2,000]

- Stephen Harper: 31%
- Andrew Scheer: 18%
- Thomas Mulcair: 7%
- Jagmeet Singh: 7%
- Gilles Duceppe: 2%
- Mario Beaulieu: 5%
- Yves-François Blanchet: 5%
- Martine Ouellet: 23%
- Liberal Leader: 51%
Now we would like to read you a list of different words or phrases that describe the some political leaders. For each word or phrase, please indicate who it BEST describes...

[asked of all respondents; n=2,000]
Now we would like to read you a list of different words or phrases that describe the political leaders. For each word or phrase, please indicate who it BEST describes…

[asked of all respondents; n=2,000]

**Leader Qualities:** Trudeau is up on ‘Strong Leadership’ since the election, while Scheer is down from 20% to only 11%

<table>
<thead>
<tr>
<th>Leader Quality</th>
<th>Jul '20</th>
<th>Oct '19 W2</th>
<th>Oct '19 W1</th>
<th>Sep '19 W2</th>
<th>Sep '19 W1</th>
<th>Apr '19</th>
<th>Feb '19</th>
<th>Sep '18</th>
<th>Oct '18 (Pre-Election)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strong leadership</strong></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Justin Trudeau</td>
<td>31%</td>
<td>25%</td>
<td>26%</td>
<td>24%</td>
<td>27%</td>
<td>23%</td>
<td>24%</td>
<td>33%</td>
<td>21%</td>
</tr>
<tr>
<td>Andrew Scheer</td>
<td>11%</td>
<td>20%</td>
<td>22%</td>
<td>19%</td>
<td>23%</td>
<td>20%</td>
<td>20%</td>
<td>19%</td>
<td>29%</td>
</tr>
<tr>
<td>Jagmeet Singh</td>
<td>12%</td>
<td>15%</td>
<td>12%</td>
<td>9%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Yves-Francois Blanchet</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Jo-Ann Roberts</td>
<td>3%</td>
<td>3%</td>
<td>5%</td>
<td>6%</td>
<td>4%</td>
<td>6%</td>
<td>7%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Maxime Bernier</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Undecided</td>
<td>19%</td>
<td>16%</td>
<td>17%</td>
<td>18%</td>
<td>19%</td>
<td>21%</td>
<td>22%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>None</td>
<td>15%</td>
<td>11%</td>
<td>10%</td>
<td>13%</td>
<td>10%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>7%</td>
</tr>
</tbody>
</table>

* *The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ). Results from before 2020 show Elizabeth May (GPC)*
**Leader Qualities: Trudeau is up on ‘Represents positive change’ to the highest level since the eve of the 2015 election**

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

[asked of all respondents; n=2,000]

### Represents positive change

<table>
<thead>
<tr>
<th></th>
<th>Jul '20</th>
<th>Oct '19 W2</th>
<th>Oct '19 W1</th>
<th>Sep '19 W2</th>
<th>Sep '19 W1</th>
<th>Apr '19</th>
<th>Feb '19</th>
<th>Oct '15 (Pre-Election)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Justin Trudeau</td>
<td>26%</td>
<td>12%</td>
<td>17%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>Andrew Scheer</td>
<td>18%</td>
<td>4%</td>
<td>9%</td>
<td>3%</td>
<td>14%</td>
<td>6%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Jagmeet Singh</td>
<td>20%</td>
<td>23%</td>
<td>4%</td>
<td>11%</td>
<td>4%</td>
<td>5%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Yves-Francois Blanchet</td>
<td>21%</td>
<td>21%</td>
<td>13%</td>
<td>3%</td>
<td>14%</td>
<td>6%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Jo-Ann Roberts</td>
<td>23%</td>
<td>23%</td>
<td>11%</td>
<td>2%</td>
<td>12%</td>
<td>5%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Maxime Bernier</td>
<td>21%</td>
<td>19%</td>
<td>11%</td>
<td>2%</td>
<td>13%</td>
<td>7%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Undecided</td>
<td>21%</td>
<td>20%</td>
<td>9%</td>
<td>2%</td>
<td>12%</td>
<td>7%</td>
<td>18%</td>
<td>11%</td>
</tr>
<tr>
<td>None</td>
<td>31%</td>
<td>14%</td>
<td>19%</td>
<td>2%</td>
<td>7%</td>
<td>2%</td>
<td>16%</td>
<td>11%</td>
</tr>
</tbody>
</table>

* The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ). Results from before 2020 show Elizabeth May (GCP)
Leader Qualities: Trudeau leads on ‘Dishonest’, but is lower on the attribute than during the 2019 election

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

[asked of all respondents; n=2,000]

<table>
<thead>
<tr>
<th>Leader Qualities: Trudeau leads on ‘Dishonest’, but is lower on the attribute than during the 2019 election</th>
<th>Jul '20</th>
<th>Oct '19 W2</th>
<th>Oct '19 W1</th>
<th>Sep '19 W2</th>
<th>Sep '19 W1</th>
<th>Apr '19</th>
<th>Feb '19</th>
<th>Oct '15 (Pre-Election)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dishonest</td>
<td>31%</td>
<td>37%</td>
<td>39%</td>
<td>39%</td>
<td>21%</td>
<td>23%</td>
<td>21%</td>
<td>31%</td>
</tr>
<tr>
<td>Stands for what I believe</td>
<td>27%</td>
<td>18%</td>
<td>20%</td>
<td>21%</td>
<td>23%</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
</tr>
</tbody>
</table>

* The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ). Results from before 2020 show Elizabeth May (GPC)
Vote is mostly steady month-to-month

Vote intention reporting:

When we look at the results among *only* decided voters, we call that **decided vote**. These results most tell us what the election results would be like if the survey results matched the election exactly.

When we ask people to think about politics in Canada and identify which party ID they usually see themselves as, we call those results **Federal Party ID**.
Federal Combined Vote: More than 1-in-3 (35%) would vote Liberal, giving them an 11-point lead over the CPC

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=2,000]

Current data: July 2020
Federal Vote Tracking: The Liberal vote share remains steady since June, maintaining their double-digit 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? [Vote + Lean] [asked of all respondents; n=2,000]

Current data: July 2020
Federal Decided Vote: 4-in-10 (40%) would vote Liberal, less than 3-in-10 (28%) of decided voters say they would vote for the CPC

If a federal 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=1,741)

Current data: July 2020
Federal Decided Vote Tracking: Decided vote is steady month-to-month with the Liberals maintaining their lead over the CPC

If a federal 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=1,741

Current data: July 2020
Decided Vote by Region: Liberals hold a commanding lead in BC, Ontario, and Atlantic Canada

<table>
<thead>
<tr>
<th>Region</th>
<th>BC (N=246)</th>
<th>AB (N=197)</th>
<th>Prairies (N=119)</th>
<th>ON (N=685)</th>
<th>QC (N=384)</th>
<th>Atlantic (N=110)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative</td>
<td>25%</td>
<td>45%</td>
<td>43%</td>
<td>30%</td>
<td>12%</td>
<td>27%</td>
</tr>
<tr>
<td>Liberal</td>
<td>40%</td>
<td>30%</td>
<td>34%</td>
<td>44%</td>
<td>36%</td>
<td>49%</td>
</tr>
<tr>
<td>NDP</td>
<td>20%</td>
<td>15%</td>
<td>12%</td>
<td>15%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Bloc</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>30%</td>
<td>0%</td>
</tr>
<tr>
<td>Green</td>
<td>11%</td>
<td>3%</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: Current data: July 2020
Decided Vote by Value Cluster: More than a third (35%) of Deferential Conservatives are decided for Liberal party

<table>
<thead>
<tr>
<th>Value Clusters</th>
<th>Conservative</th>
<th>Liberal</th>
<th>NDP</th>
<th>Bloc</th>
<th>Green</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferential Conservatives</td>
<td>45%</td>
<td>35%</td>
<td>5%</td>
<td>7%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>(N=207)</td>
<td>(N=213)</td>
<td>(N=442)</td>
<td>(N=246)</td>
<td>(N=285)</td>
<td>(N=348)</td>
<td></td>
</tr>
<tr>
<td>Populist Conservatives</td>
<td>68%</td>
<td>15%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Business Liberals</td>
<td>25%</td>
<td>47%</td>
<td>12%</td>
<td>9%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Left Liberals</td>
<td>18%</td>
<td>46%</td>
<td>18%</td>
<td>5%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Thrifty Moderates</td>
<td>28%</td>
<td>34%</td>
<td>12%</td>
<td>9%</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Core Left</td>
<td>5%</td>
<td>49%</td>
<td>29%</td>
<td>5%</td>
<td>11%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Note: Current data: July 2020
Value Clusters: Liberals continue to lead in all value groups but the Liberal lead is smallest among Thrifty Moderates.

Core Left

Left Liberals

Thrifty Moderates

Note: Individual charts use different y-axes. Use caution when comparing across charts.

Decided vote: Liberal Conservative NDP Green Bloc PPC/Other
Value Clusters: While the Liberals lead among ‘Business Liberals’, the CPC is ahead in vote among the Conservative groups

**Business Liberals**

- July '15: 30%
- Sept '15: 34%
- Oct '15: 30%
- Post-Election '15: 34%
- Jan '18: 30%
- Sept '19 W1: 30%
- Sept '19 W2: 30%
- Oct '19 W1: 30%
- Oct '19 W2: 30%
- Jan '20: 30%
- May '20: 30%
- Jun '20: 30%
- Jul '20: 47%

**Deferential Conservatives**

- July '15: 23%
- Sept '15: 24%
- Oct '15: 23%
- Post-Election '15: 23%
- Jan '18: 25%
- Sept '19 W1: 25%
- Sept '19 W2: 25%
- Oct '19 W1: 25%
- Oct '19 W2: 25%
- Jan '20: 25%
- May '20: 25%
- Jun '20: 25%
- Jul '20: 35%

**Populist Conservatives**

- July '15: 1%
- Sept '15: 1%
- Oct '15: 1%
- Post-Election '15: 1%
- Jan '18: 1%
- Sept '19 W1: 1%
- Sept '19 W2: 1%
- Oct '19 W1: 1%
- Oct '19 W2: 1%
- Jan '20: 1%
- May '20: 1%
- Jun '20: 1%
- Jul '20: 68%

Note: Individual charts use different y-axes. Use caution when comparing across charts.
Decided Vote by Economic Gap: Achievers roughly tied between Liberals and CPC, Liberals lead other three economic groups

<table>
<thead>
<tr>
<th>Economic Gap</th>
<th>Achievers (N=573)</th>
<th>Strugglers (N=472)</th>
<th>Ambivalent (N=318)</th>
<th>Alienated (N=379)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative</td>
<td>36%</td>
<td>30%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>Liberal</td>
<td>40%</td>
<td>37%</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>NDP</td>
<td>8%</td>
<td>12%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Bloc</td>
<td>7%</td>
<td>10%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Green</td>
<td>5%</td>
<td>7%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Note: Current data: July 2020
Federal Vote by Gap Segments: The Liberals lead in all Gap Segments; furthest ahead among Ambivalent and Alienated voters.

Note: Individual charts use different scales. Use caution when comparing across charts.
### Decided Vote by Time for Change: Half (46%) of Time for a Change
Liberals say they would still vote for the Liberal party

<table>
<thead>
<tr>
<th>Federal Decided Vote</th>
<th>Core LPC (N=477)</th>
<th>Soft LPC (N=153)</th>
<th>Time for change (N=191)</th>
<th>Uncertain (N=142)</th>
<th>Soft anti-LPC (N=365)</th>
<th>Hostile (N=414)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative</td>
<td>1%</td>
<td>8%</td>
<td>16%</td>
<td>15%</td>
<td>33%</td>
<td>72%</td>
</tr>
<tr>
<td>Liberal</td>
<td>86%</td>
<td>61%</td>
<td>46%</td>
<td>36%</td>
<td>14%</td>
<td>1%</td>
</tr>
<tr>
<td>NDP</td>
<td>7%</td>
<td>16%</td>
<td>17%</td>
<td>25%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Bloc</td>
<td>3%</td>
<td>3%</td>
<td>7%</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
</tr>
<tr>
<td>Green</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Note:** Current data: July 2020
Federal 2nd Choice: A plurality don’t have a second choice; from those that do, NDP leads at 20%

And which party would be your second choice?
[only decided voters; n=1,741]
Federal 2nd Choice: Nearly 4-in-10 (37%) likely NDP voters would choose Liberals as their second choice

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

<table>
<thead>
<tr>
<th>Second Choice</th>
<th>Conservative 1st Choice (N=485)</th>
<th>Liberal 1st Choice (N=694)</th>
<th>NDP 1st Choice (N=247)</th>
<th>Bloc 1st Choice (N=117)</th>
<th>Green 1st Choice (N=126)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative 2nd Choice</td>
<td></td>
<td>13%</td>
<td>10%</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>Liberal 2nd Choice</td>
<td>13%</td>
<td></td>
<td>37%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>NDP 2nd Choice</td>
<td>10%</td>
<td>33%</td>
<td></td>
<td>13%</td>
<td>31%</td>
</tr>
<tr>
<td>Bloc 2nd Choice</td>
<td>2%</td>
<td>3%</td>
<td>2%</td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>Green 2nd Choice</td>
<td>7%</td>
<td>16%</td>
<td>26%</td>
<td>17%</td>
<td>0%</td>
</tr>
<tr>
<td>Other 2nd Choice</td>
<td>13%</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
<td>11%</td>
</tr>
<tr>
<td>Undecided</td>
<td>30%</td>
<td>25%</td>
<td>18%</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>WNV/None</td>
<td>25%</td>
<td>9%</td>
<td>6%</td>
<td>10%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Note: ‘Other’ in Combined Vote not shown due to insufficient sample size.

Current data: July 2020
Federal Party ID: 3-in-10 (31%) identify as Liberal, 2-in-10 (21%) as CPC, and 16% as Independent

Now we have just a few last questions for statistical purposes. Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...

[asked of all respondents; n=2,000]
Federal Party ID (Quebec vs. ROC): A plurality identify as Liberal; in Quebec, 2-in-10 (21%) identify as Bloc

**Party ID: Quebec**
[Respondents in Quebec; n=467]

- Conservative: 10%
- Liberal: 30%
- NDP: 6%
- Bloc: 9%
- Other: 21%
- Unaligned: 24%

**Party ID: Rest of Canada**
[Respondents in the rest of Canada; n=1,533]

- Conservative: 25%
- Liberal: 32%
- NDP: 12%
- Other: 10%
- Unaligned: 22%

Current data: July 2020
Federal Party ID Tracking: Liberals continue to lead on party ID with no significant change month-to-month

Now we have just a few last questions for statistical purposes. Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...

[asked of all respondents; n=2,000]

Current data: July 2020
Combined Vote by Party ID: Both Liberal and CPC partisans appear most loyal, with roughly 9-in-10 partisans voting along party lines.

<table>
<thead>
<tr>
<th>Federal Combined Vote</th>
<th>Conservative</th>
<th>Liberal</th>
<th>NDP</th>
<th>Other</th>
<th>Unaligned</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(N=418)</td>
<td>(N=608)</td>
<td>(N=205)</td>
<td>(N=279)</td>
<td>(N=231)</td>
</tr>
<tr>
<td>Conservative</td>
<td>88%</td>
<td>4%</td>
<td>6%</td>
<td>8%</td>
<td>27%</td>
</tr>
<tr>
<td>Liberal</td>
<td>6%</td>
<td>89%</td>
<td>12%</td>
<td>12%</td>
<td>30%</td>
</tr>
<tr>
<td>NDP</td>
<td>2%</td>
<td>3%</td>
<td>78%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>Bloc</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>33%</td>
<td>7%</td>
</tr>
<tr>
<td>Green</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>1%</td>
<td>1%</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Note: Current data: July 2020
Reopening

As in June, a majority say the federal government is reopening the economy at ‘the right pace’. But those in Western Canada are increasingly saying the federal government is going ‘too fast’.
Easing Restrictions, Federal: A majority still say the federal government is easing restrictions at the right pace (52%)
Easing Restrictions, Federal: Those in Prairies most likely to say federal gov’t has gone ‘too fast’ (35%), while those in Atlantic are least likely

Now, thinking about the steps the federal government has taken so far to ease restrictions on businesses and social contacts, do you think the federal government has gone too fast, has gone too slow, or has gone about the right pace?
[asked of all respondents; n=2,000]

Overall
- Far too fast: 6%
- Somewhat too fast: 20%
- About the right pace: 52%
- Somewhat too slow: 9%
- Far too slow: 5%
- Don’t know: 8%

% Too Fast
- Overall: 26%

BC
- Far too fast: 4%
- Somewhat too fast: 23%
- About the right pace: 51%
- Somewhat too slow: 10%
- Far too slow: 5%
- Don’t know: 7%

- BC: 27%

Alberta
- Far too fast: 6%
- Somewhat too fast: 24%
- About the right pace: 41%
- Somewhat too slow: 10%
- Far too slow: 9%
- Don’t know: 10%

- Alberta: 30%

Prairies
- Far too fast: 13%
- Somewhat too fast: 22%
- About the right pace: 46%
- Somewhat too slow: 8%
- Far too slow: 5%
- Don’t know: 5%

- Prairies: 35%

Ontario
- Far too fast: 6%
- Somewhat too fast: 19%
- About the right pace: 55%
- Somewhat too slow: 9%
- Far too slow: 4%
- Don’t know: 7%

- Ontario: 25%

Quebec
- Far too fast: 7%
- Somewhat too fast: 19%
- About the right pace: 51%
- Somewhat too slow: 10%
- Far too slow: 4%
- Don’t know: 10%

- Quebec: 26%

Atlantic
- Far too fast: 5%
- Somewhat too fast: 12%
- About the right pace: 65%
- Somewhat too slow: 4%
- Far too slow: 5%
- Don’t know: 9%

- Atlantic: 16%
Easing Restrictions, Federal: Those saying the federal government has gone too fast are up in BC, Alberta, and the Prairies

Now, thinking about the steps the federal government has taken so far to ease restrictions on businesses and social contacts, do you think the federal government has gone too fast, has gone too slow, or has gone about the right pace?

[asked of all respondents; n=2,000]

<table>
<thead>
<tr>
<th></th>
<th>% Too Fast</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>July 14-20</td>
</tr>
<tr>
<td>BC</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>23%</td>
</tr>
<tr>
<td></td>
<td>51%</td>
</tr>
<tr>
<td></td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>7%</td>
</tr>
<tr>
<td>Alberta</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td>41%</td>
</tr>
<tr>
<td></td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Prairies</td>
<td>13%</td>
</tr>
<tr>
<td></td>
<td>22%</td>
</tr>
<tr>
<td></td>
<td>46%</td>
</tr>
<tr>
<td></td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
</tr>
<tr>
<td></td>
<td>35%</td>
</tr>
</tbody>
</table>
Easing Restrictions, Federal: The share of Canadians saying the federal government is reopening too fast is steady or down in Eastern regions

Now, thinking about the steps the federal government has taken so far to ease restrictions on businesses and social contacts, do you think the federal government has gone too fast, has gone too slow, or has gone about the right pace?
[asked of all respondents; n=2,000]

<table>
<thead>
<tr>
<th></th>
<th>% Too Fast</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ontario</td>
</tr>
<tr>
<td>July 14-20</td>
<td>56%</td>
</tr>
<tr>
<td>June 17-30</td>
<td>54%</td>
</tr>
<tr>
<td>May 29-June 1</td>
<td>50%</td>
</tr>
<tr>
<td>May 15-20</td>
<td>51%</td>
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July 14-20, Ontario: 25%; Quebec: 26%; Atlantic: 16%
Methodology
These are the results of an online survey conducted between July 14th to July 20th, 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=2,599 Canadian citizens, 18 years or older. Regional oversamples in Alberta and BC were used in order to adequately capture perspective on those provinces. The results are nationally weighted to n=2,000 based on Census data from Statistics Canada.

Field Dates: July 14th to July 20th, 2020.

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.

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.
For more information, please contact:

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