Canada This Month
Federal Politics

Public Opinion Research
Release Date: May 5, 2021
Field Dates: April 22 to May 5, 2021

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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 slowly but steadily falling over the last several months. But, general satisfaction with the government has remained fairly steady since the summer of 2020. The Liberals have continued to maintain their lead in vote over the Conservatives. Satisfaction with the Federal budget is up to its highest point across our tracking since 2016.

Today, INNOVATIVE is releasing results from our April 2021 Canada This Month survey. This online survey was in field from April 22nd to May 5th with a weighted sample size of 2,000. Detailed methodology is provided in the appendix.

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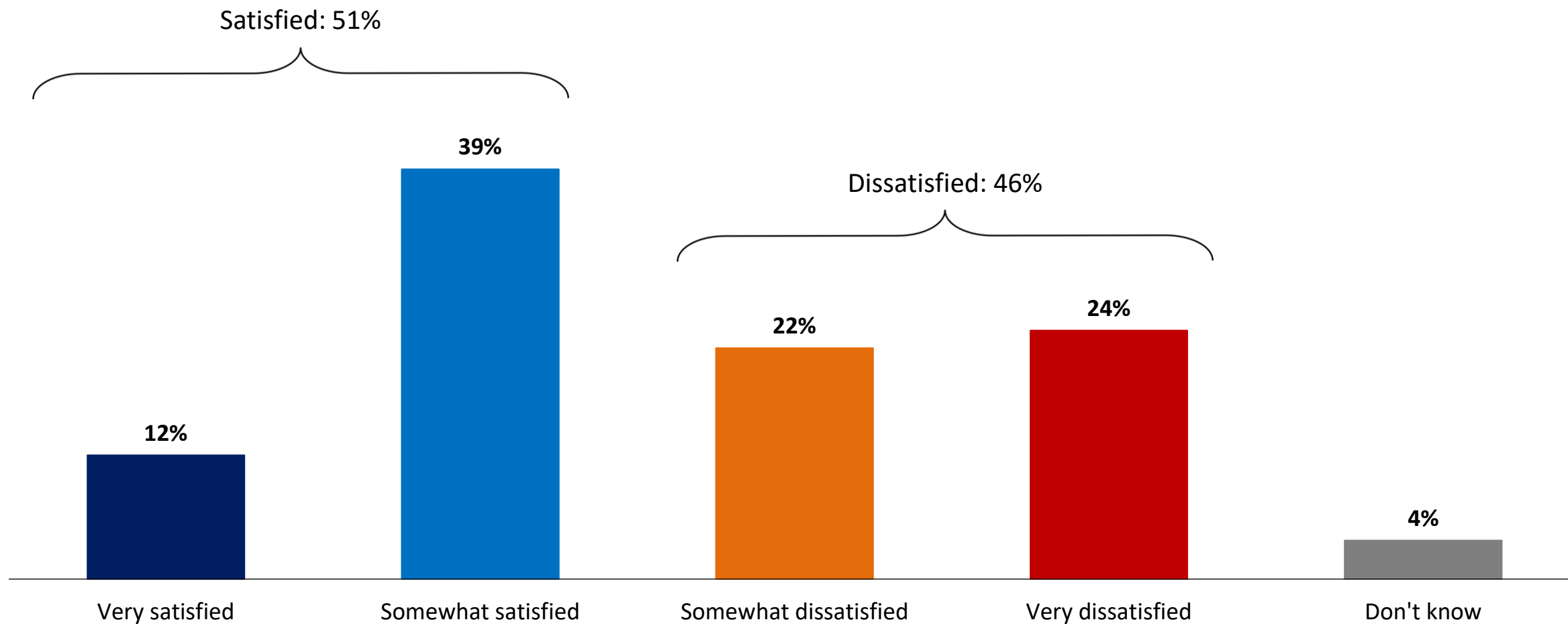
Government Approval

While general government approval remains quite high at 51%, approval of the federal government's job handling of COVID-19 has been trending downwards over the last several months.

Federal Satisfaction: Half (51%) are satisfied with the performance of the federal government while another half (46%) are dissatisfied

Q 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: 51%

Dissatisfied: 46%

Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Don't know
12%	39%	22%	24%	4%

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Federal Satisfaction Tracking: Satisfaction with the federal government's performance is steady compared to most of 2021
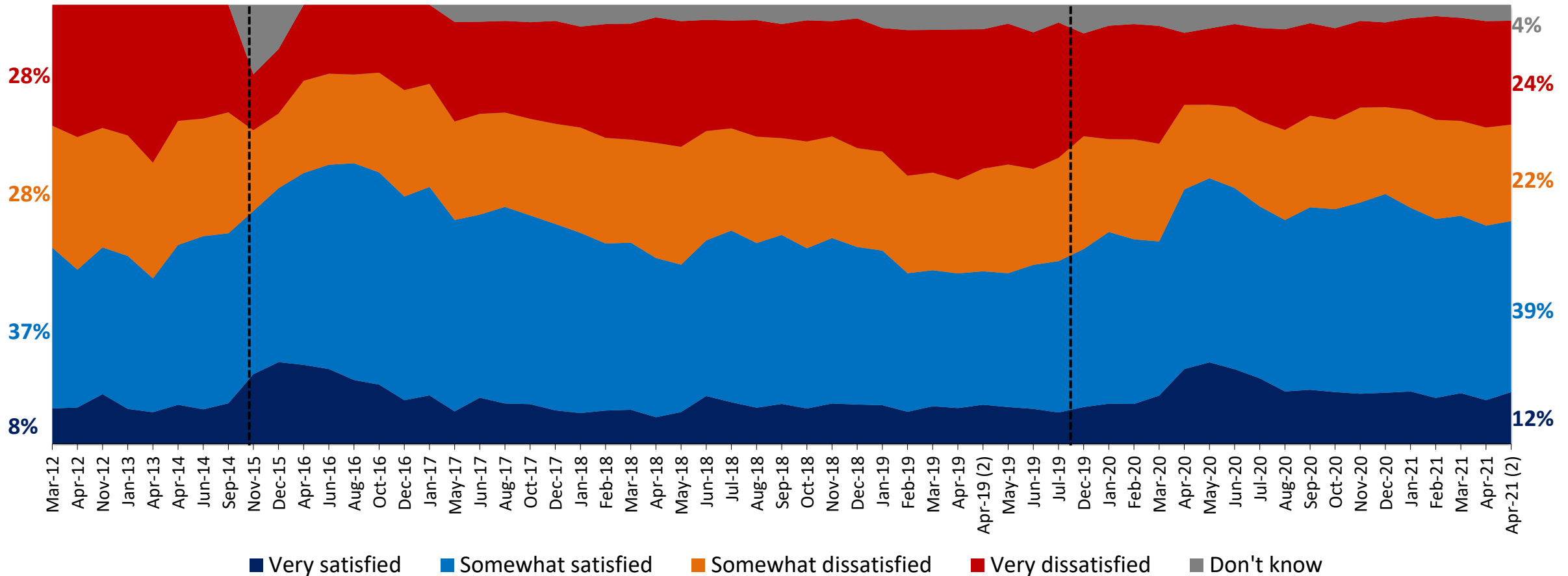
Q Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada? Would you say you are...?
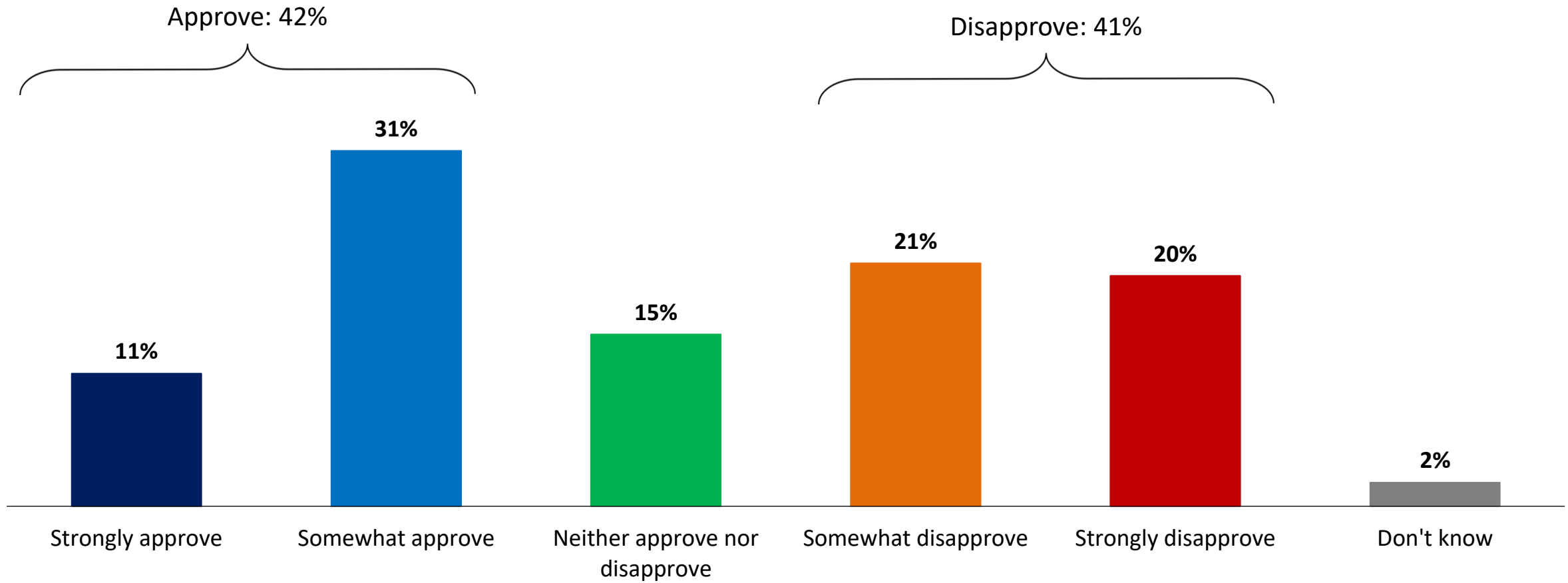[asked of all respondents; n=2,000]

2015 Election
2019 Election

28%
28%
37%
8%

4%
24%
22%
39%
12%

Mar-12 Apr-12 Nov-12 Jan-13 Apr-13 Apr-14 Jun-14 Sep-14 Nov-15 Dec-15 Apr-16 Jun-16 Aug-16 Oct-16 Dec-16 Jan-17 May-17 Jun-17 Aug-17 Oct-17 Dec-17 Jan-18 Feb-18 Mar-18 Apr-18 May-18 Jun-18 Jul-18 Aug-18 Sep-18 Oct-18 Nov-18 Dec-18 Jan-19 Feb-19 Mar-19 Apr-19 Apr-19 (2) May-19 Jun-19 Jul-19 Dec-19 Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 Apr-21 (2)

■ Very satisfied ■ Somewhat satisfied ■ Somewhat dissatisfied ■ Very dissatisfied ■ Don't know

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Current data: April 2021

COVID-19 Handling: Respondents are split on whether they approve (42%) or disapprove (41%) of the federal gov'ts handling of COVID-19
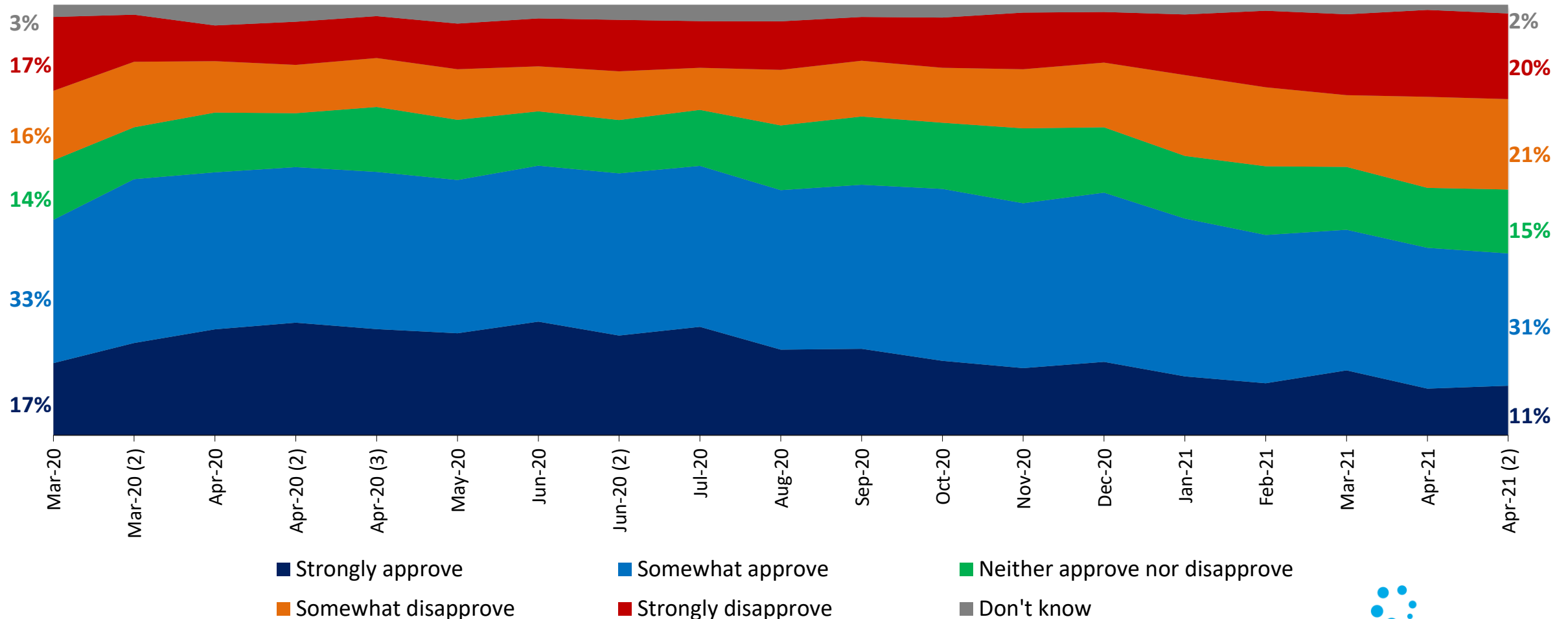
Q Now thinking about the federal government, do you approve or disapprove of the way the federal government has handled the outbreak of COVID-19?
[asked of all respondents; n=2,000]

Approve: 42%   Disapprove: 41%

Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know
11%	31%	15%	21%	20%	2%

Current data: April 2021

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COVID-19 Handling Tracking: Approval of the federal gov'ts handling of COVID-19 has been declining since late last year – down 10 points.

Q 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]

Legend:
- Strongly approve (dark navy)
- Somewhat approve (blue)
- Neither approve nor disapprove (green)
- Somewhat disapprove (orange)
- Strongly disapprove (red)
- Don't know (gray)

Left-side values (Mar-20): 3%, 17%, 16%, 14%, 33%, 17%
Right-side values (Apr-21 (2)): 2%, 20%, 21%, 15%, 31%, 11%

X-axis labels: Mar-20, Mar-20 (2), Apr-20, Apr-20 (2), Apr-20 (3), May-20, Jun-20, Jun-20 (2), Jul-20, Aug-20, Sep-20, Oct-20, Nov-20, Dec-20, Jan-21, Feb-21, Mar-21, Apr-21, Apr-21 (2)

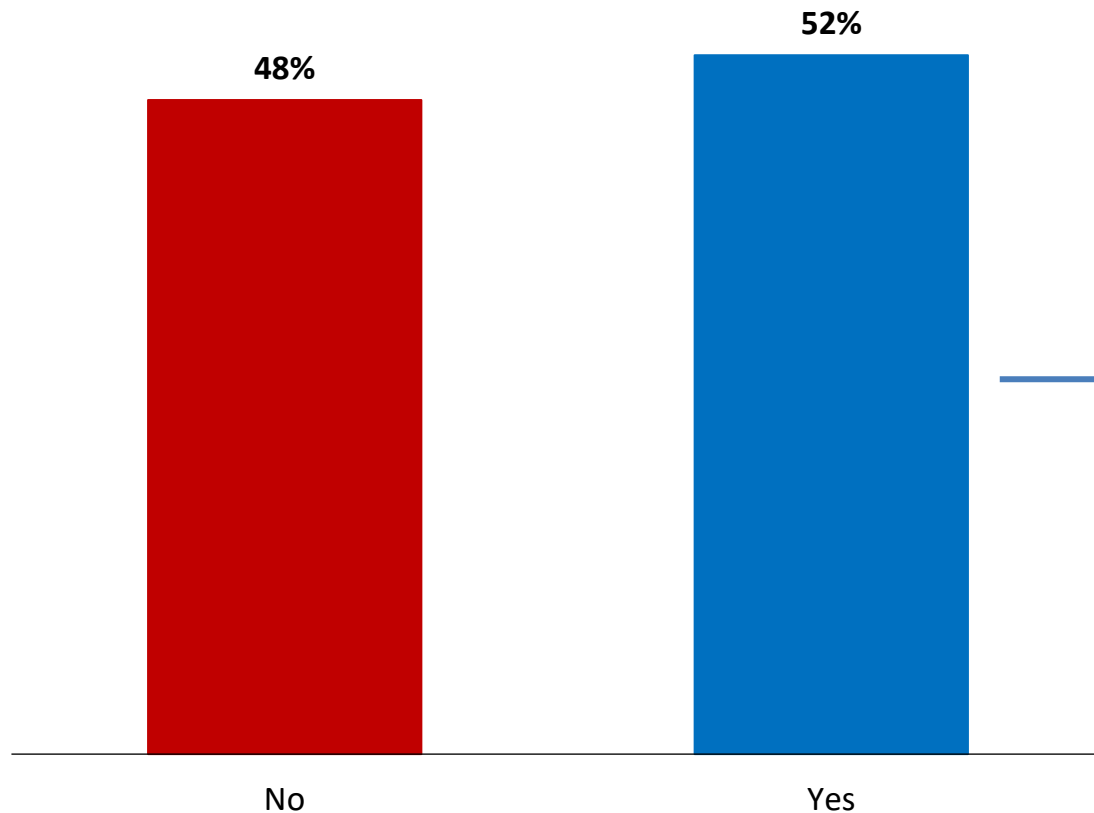Current data: April 2021

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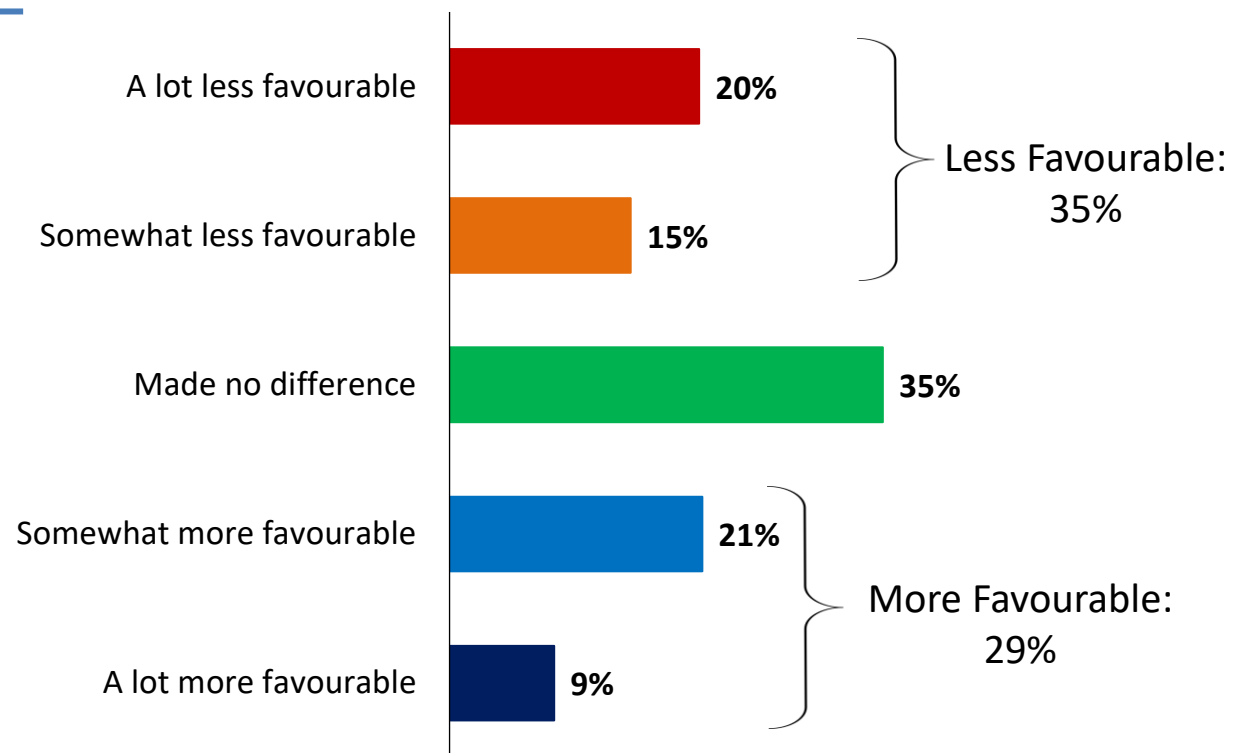
Read, Seen, Heard

Half of Canadians have read, seen, or heard something about Trudeau in the last few days. Among those who have, impact is slightly more positive than it was in early April.

Federal Read, Seen, Heard: Half (52%) have RSH something in the last few days; of those who have, 35% were left less favourable

Q 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]

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 Canada's Prime Minister and the Federal government?
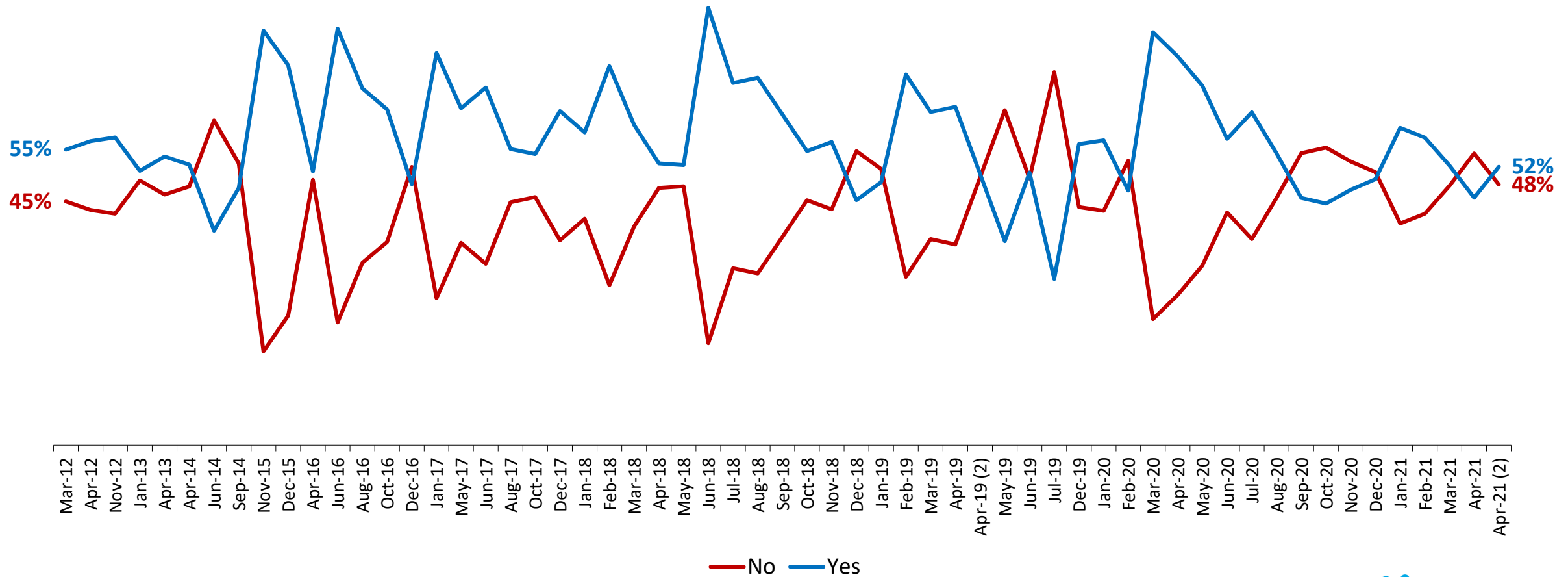[asked of those who have RSH; n=1,033]

48%

52%

No

Yes

A lot less favourable — 20%
Somewhat less favourable — 15%

Less Favourable: 35%

Made no difference — 35%

Somewhat more favourable — 21%

A lot more favourable — 9%

More Favourable: 29%

Current data: April 2021

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Read, Seen, Heard Tracking: Those saying they have RSH something in the last few days is up from 46% in early April to 52% now

Q 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=2000]

55%
45%

52%
48%

Mar-12 Apr-12 Nov-12 Jan-13 Apr-13 Apr-14 Jun-14 Sep-14 Nov-15 Dec-15 Apr-16 Jun-16 Aug-16 Oct-16 Dec-16 Jan-17 May-17 Jun-17 Aug-17 Oct-17 Dec-17 Jan-18 Feb-18 Mar-18 Apr-18 May-18 Jun-18 Jul-18 Aug-18 Sep-18 Oct-18 Nov-18 Dec-18 Jan-19 Feb-19 Mar-19 Apr-19 Apr-19 (2) May-19 Jun-19 Jul-19 Dec-19 Jan-20 Feb-20 Mar-20 Apr-20 May-20 Jun-20 Jul-20 Aug-20 Sep-20 Oct-20 Nov-20 Dec-20 Jan-21 Feb-21 Mar-21 Apr-21 Apr-21 (2)

—No —Yes

Note: Don't know not shown.
Current data: April 2021

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Federal Read, Seen, Heard, Impact Tracking: Winds of public debate a little more negative than positive, but better than earlier in April
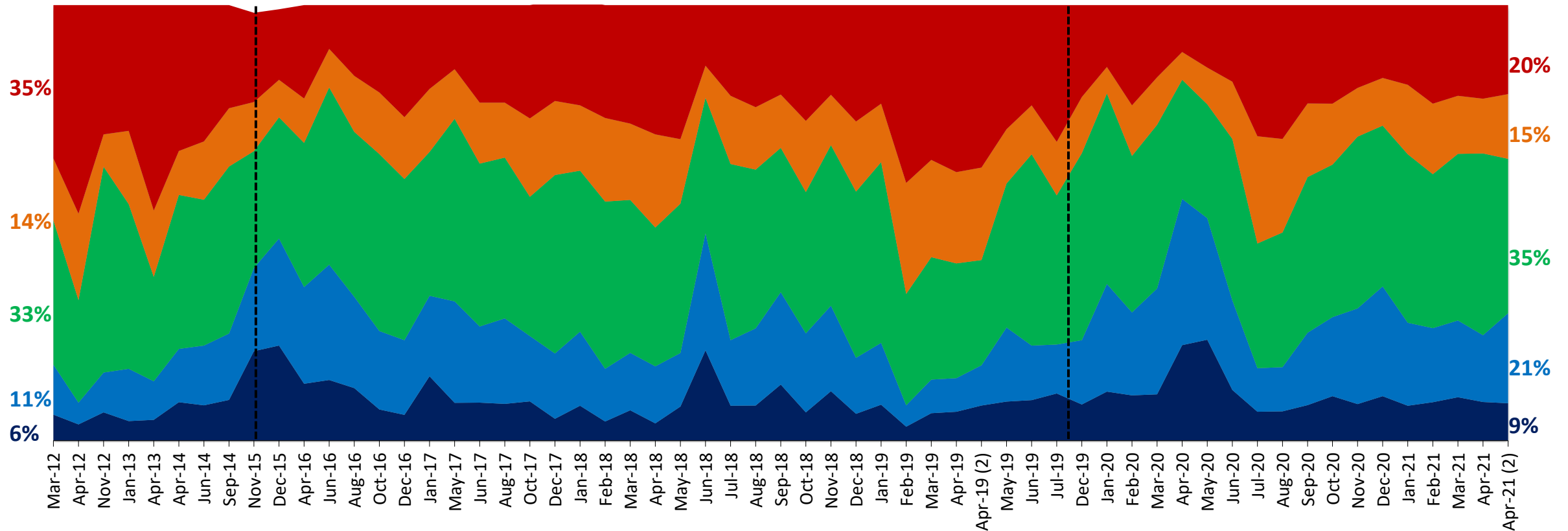
Q Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?

[asked of those who have RSH; n=1033]

■ A lot more favourable ■ Somewhat more favourable ■ Made no difference ■ Somewhat less favourable ■ A lot less favourable

Note: Don't know not shown.
Current data: April 2021
Note: In May '18, this question is asked of all respondents except those in Ontario.
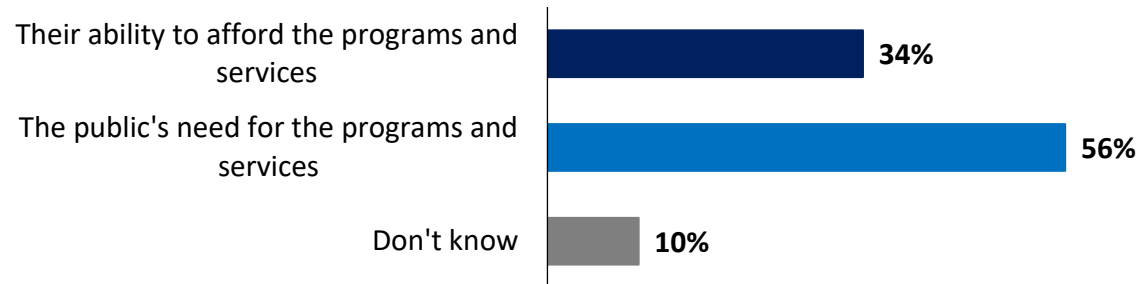
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We group individuals into segments based on key political and economic values and attitudes

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

Core Political Values: Over half (56%) say governments should make spending decisions based on public need over ability to afford
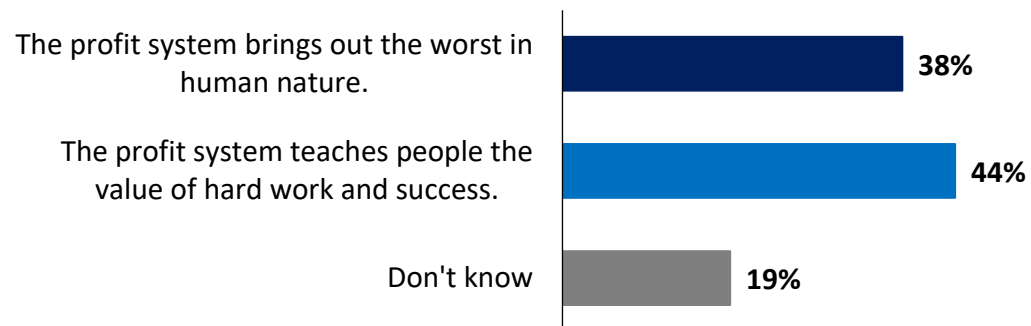
Q Now we would like to ask a few questions about basic values and society...When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?
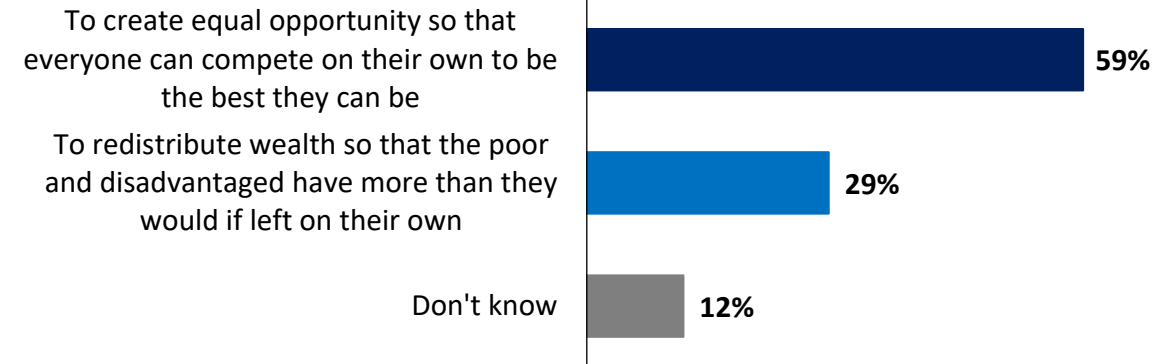[asked of all respondents; n=2,000]

Their ability to afford the programs and services	34%
The public's need for the programs and services	56%
Don't know	10%

Q 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	59%
To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own	29%
Don't know	12%

Q 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.	38%
The profit system teaches people the value of hard work and success.	44%
Don't know	19%

Q 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.	39%
Provincial issues are complicated so government should listen to experts when it comes to policy.	46%
Don't Know	14%

Current data: April 2021

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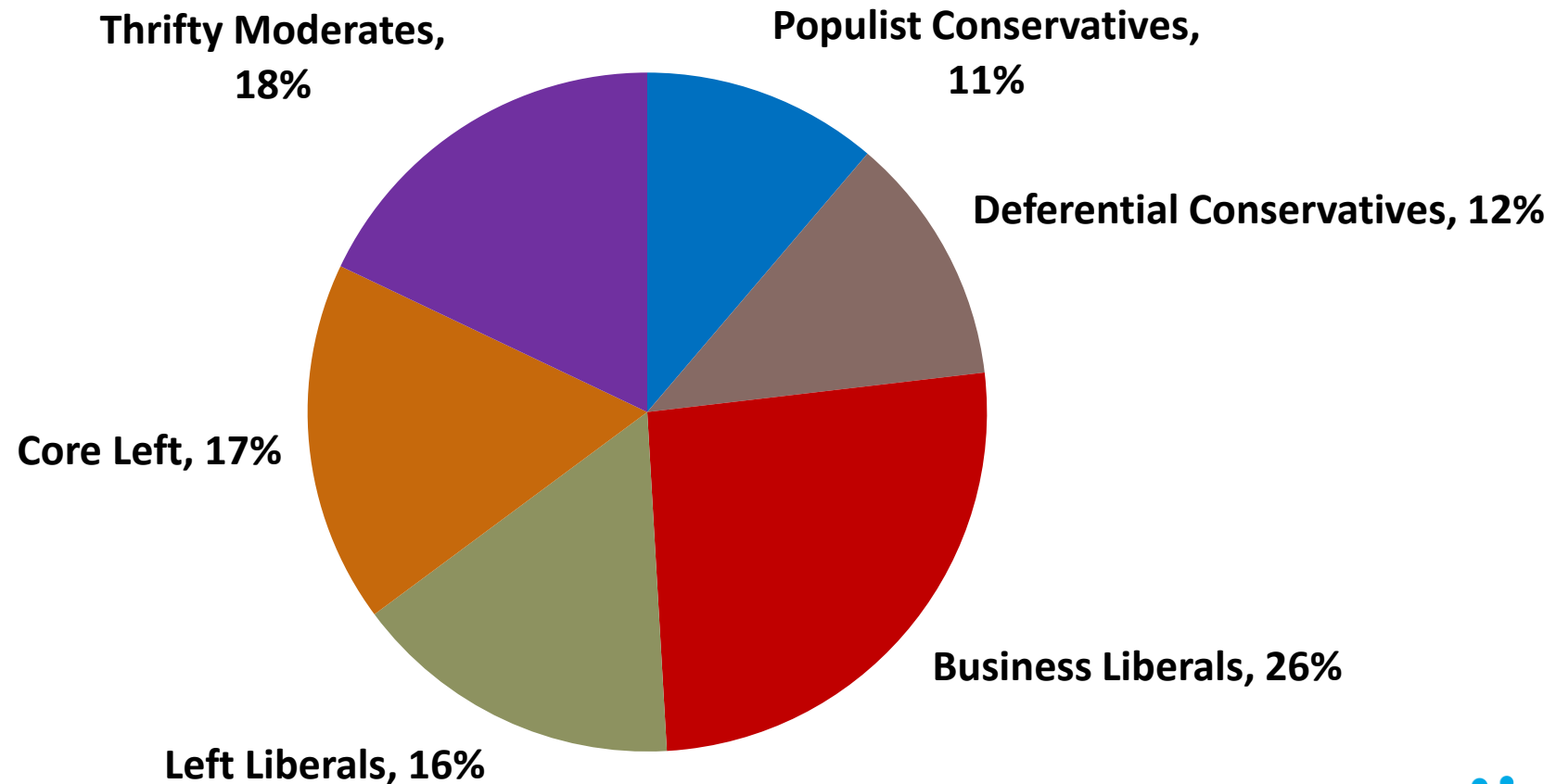RESEARCH GROUP
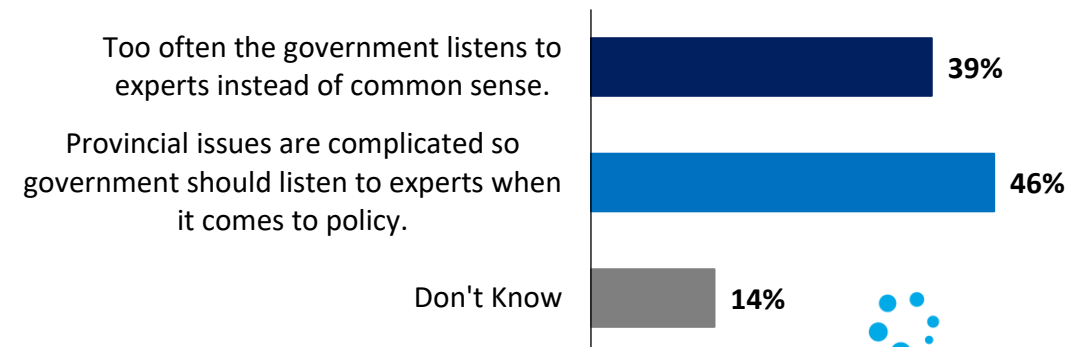
Value Clusters: 1-in-4 (26%) Canadians are Business Liberals followed by Thrifty Moderates (18%) and Core Left (17%)

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]

Thrifty Moderates, 18%

Populist Conservatives, 11%

Deferential Conservatives, 12%

Core Left, 17%

Business Liberals, 26%

Left Liberals, 16%

Current data: April 2021

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Defining Value Clusters: Conservative clusters are split based on whether they think gov'ts should listen to experts or common sense

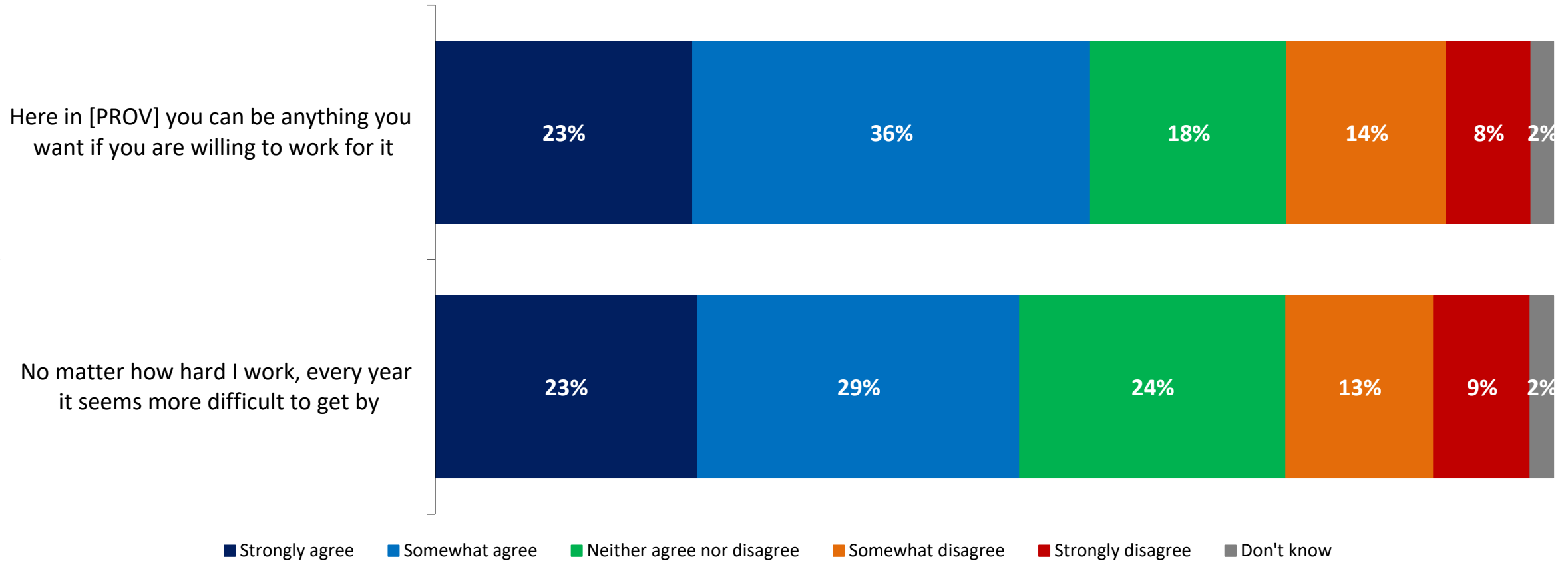Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Thrifty Moderates
Governments should base decisions on…	Ability to afford	92%	89%	0%	0%	0%	73%
	Public Need	0%	0%	97%	94%	93%	0%
Is the main role of government to .?	Create equal Opportunity	100%	76%	70%	96%	0%	34%
	Redistribute wealth	0%	16%	18%	0%	95%	34%
When it comes to government decision making…	Rely on common sense	100%	0%	34%	46%	26%	42%
	Listen to experts	0%	90%	55%	38%	62%	26%
The profit system…	Brings out the worst in human nature	0%	0%	0%	79%	84%	61%
	Teaches value of hard work and success	91%	82%	85%	0%	0%	10%

Note: Current data: April 2021

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Segmentation Attitudes: A majority of Canadians believe that you can be anything you want if you're willing to work for it

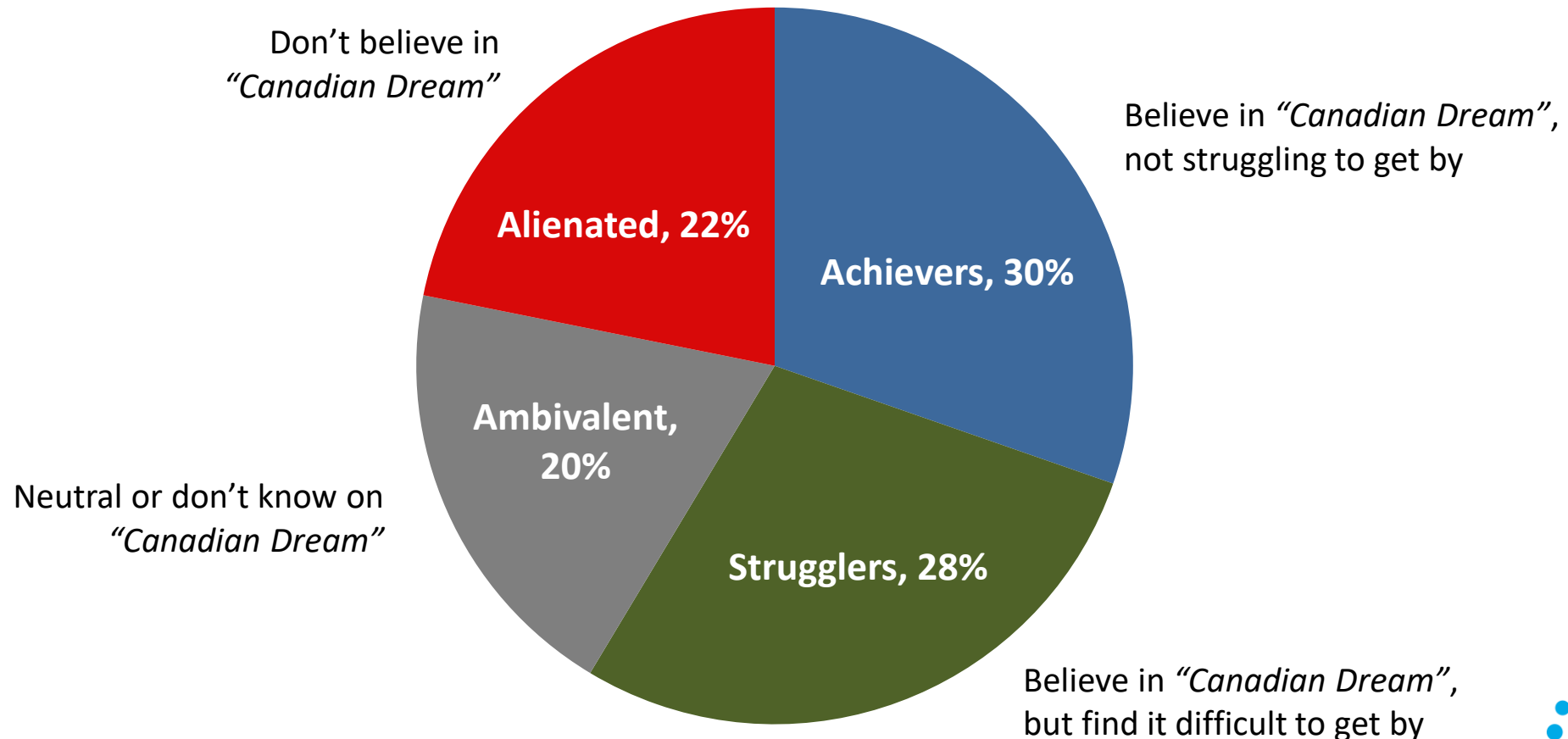**Q** Do you agree or disagree with the following statements?
[asked of all respondents; n=2,000]

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
Here in [PROV] you can be anything you want if you are willing to work for it	23%	36%	18%	14%	8%	2%
No matter how hard I work, every year it seems more difficult to get by	23%	29%	24%	13%	9%	2%

Current data: April 2021

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Economic Gap Segmentation: Most Canadians are either Canadian Dream Achievers (30%) or Strugglers (28%)

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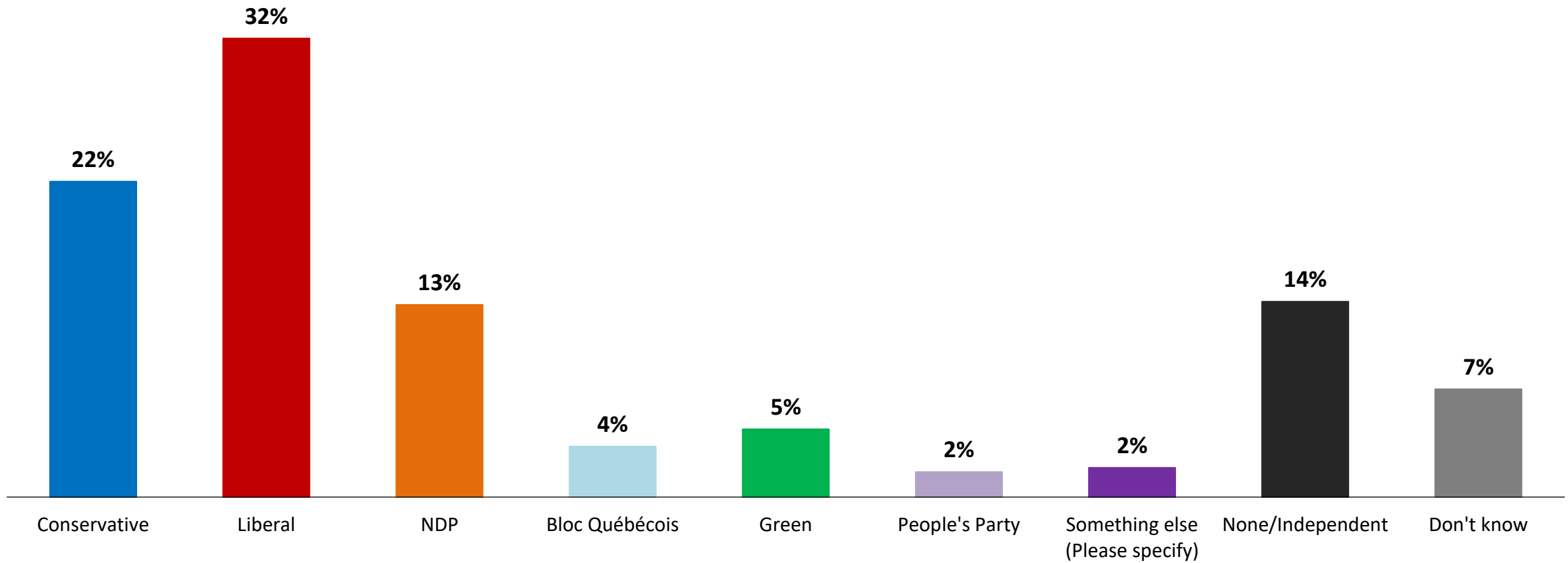
[asked of all respondents; n=2,000]

Don't believe in *"Canadian Dream"*

Believe in *"Canadian Dream"*, not struggling to get by

Neutral or don't know on *"Canadian Dream"*

Believe in *"Canadian Dream"*, but find it difficult to get by

Current data: April 2021

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Federal Party ID: 1-in-3 (32%) identify as Liberals followed by Conservatives (22%) while the NDP trails (13%)
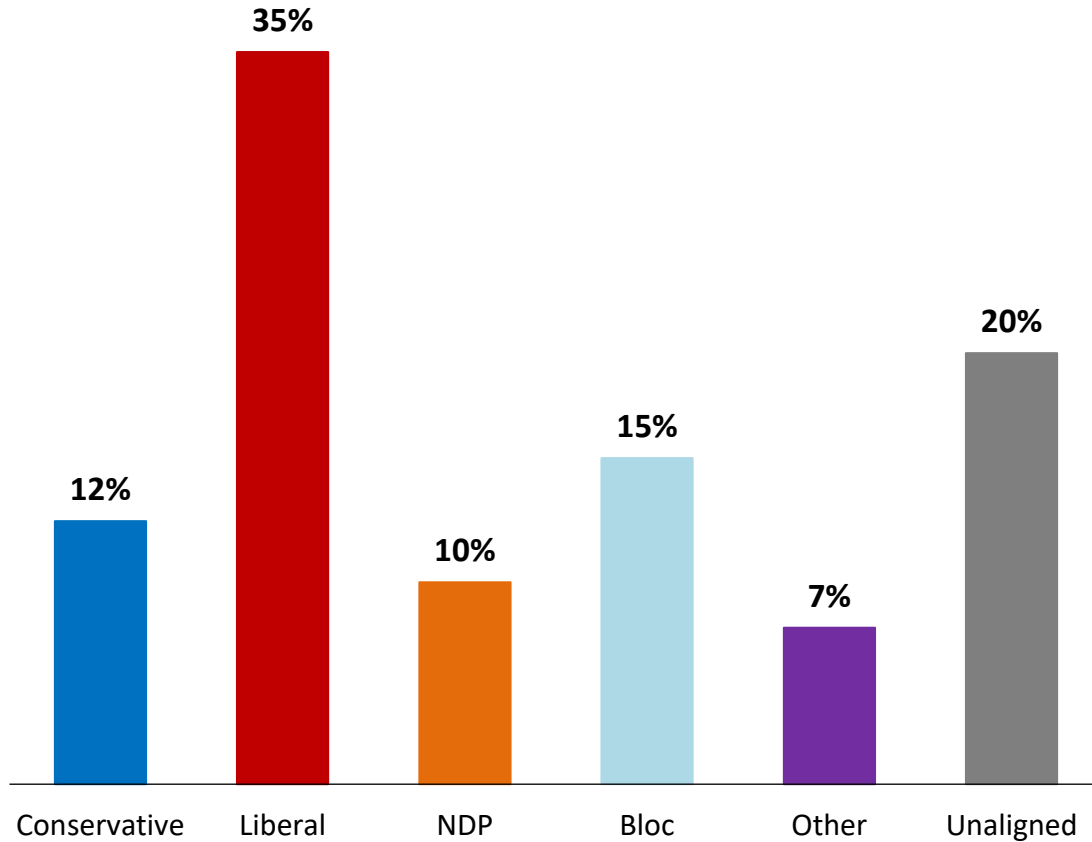
Q Now we have just a few last questions for statistical purposes. Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[asked of all respondents; n=2,000]

Bar chart:
- Conservative: 22%
- Liberal: 32%
- NDP: 13%
- Bloc Québécois: 4%
- Green: 5%
- People's Party: 2%
- Something else (Please specify): 2%
- None/Independent: 14%
- Don't know: 7%

Current data: April 2021

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Federal Party ID (Quebec vs. ROC): The Liberals have the lead in party ID in both Quebec and the rest of Canada

Party ID: Quebec

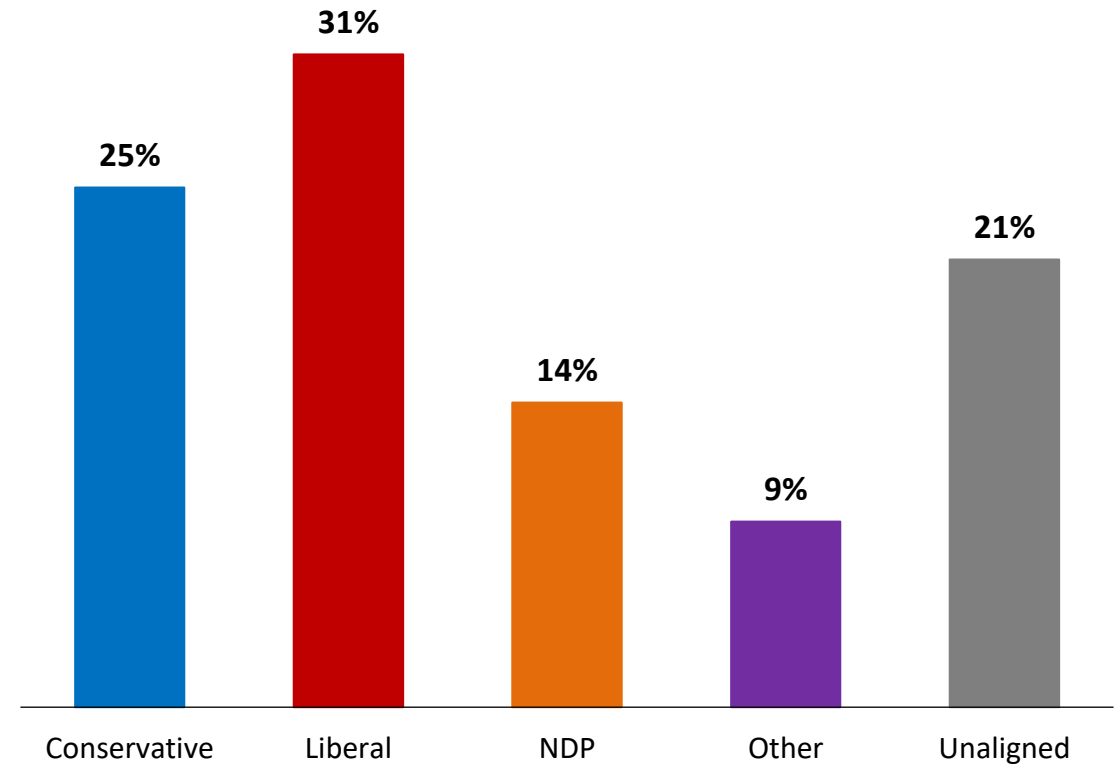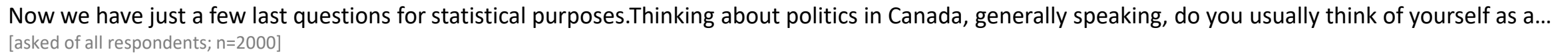[Respondents in Quebec; n=455]

Conservative	Liberal	NDP	Bloc	Other	Unaligned
12%	35%	10%	15%	7%	20%

Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1,545]

Conservative	Liberal	NDP	Other	Unaligned
25%	31%	14%	9%	21%

Current data: April 2021

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Federal Party ID Tracking: Party ID is steady compared to early April for both the Liberals and Conservatives

Q 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=2000]

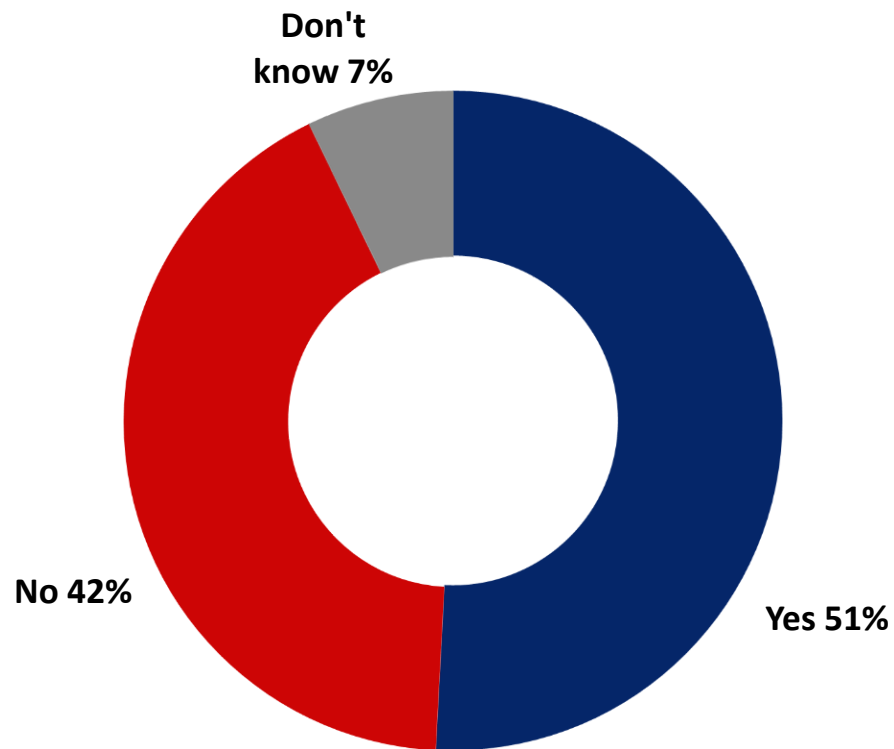Current data: April 2021

Reaction to Federal Budget

Half of Canadians recall reading, hearing, or seeing about the federal budget and among those who have, 1-in-4 say they are satisfied with it. Satisfaction with the budget is up to its highest point across our tracking since 2016.

RSH Budget: Half (51%) of Canadians recall hearing about the federal budget; highest among CPC partisans (58%)
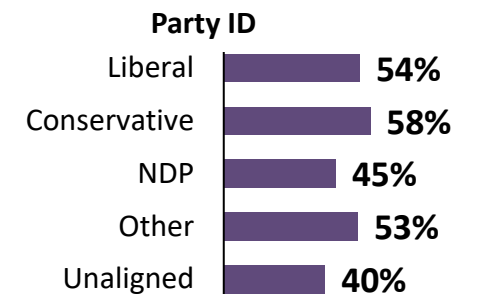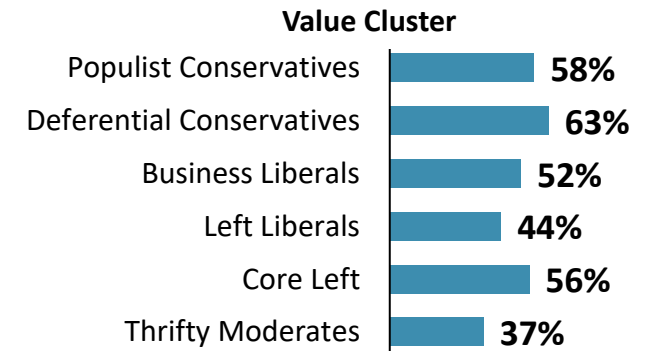
Q Have you read, seen or heard anything about the recent federal budget that was presented in Parliament on Monday, April 19th, 2021?

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

Don't know 7%

Yes 51%

No 42%

Segmentation

Respondents who say "yes"

Region

BC	48%
Alberta	50%
Prairies	52%
Ontario	53%
Quebec	48%
Atlantic Canada	51%

Value Cluster

Populist Conservatives	58%
Deferential Conservatives	63%
Business Liberals	52%
Left Liberals	44%
Core Left	56%
Thrifty Moderates	37%

Party ID

Liberal	54%
Conservative	58%
NDP	45%
Other	53%
Unaligned	40%

RSH Budget: Those saying they have RSH about the budget (51%) is consistent with the results from 2019 (53%)
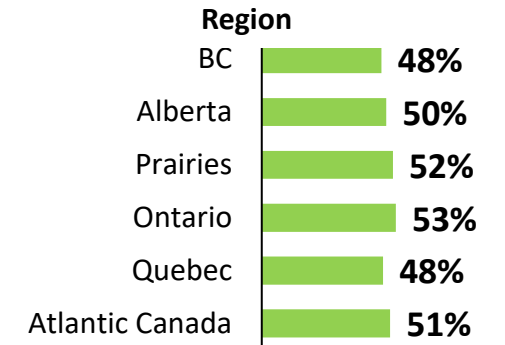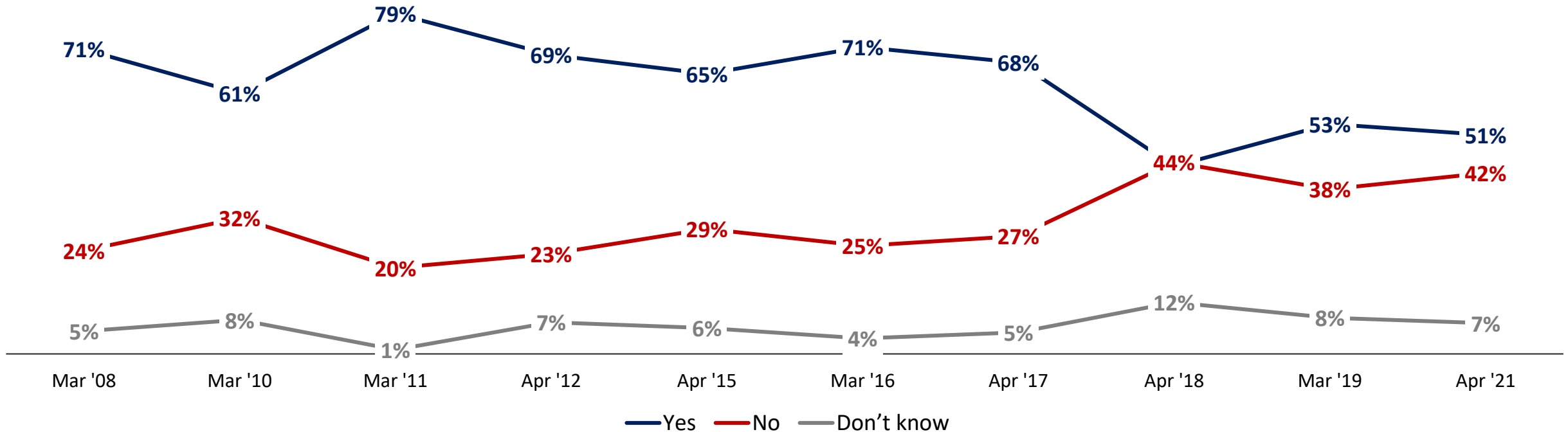
Q Have you read, seen or heard anything about the recent federal budget that was presented in Parliament on Monday, April 19th, 2021?
[asked of all respondents, n=2,000]

Line chart showing responses over time:

Yes (dark blue):
- Mar '08: 71%
- Mar '10: 61%
- Mar '11: 79%
- Apr '12: 69%
- Apr '15: 65%
- Mar '16: 71%
- Apr '17: 68%
- Apr '18: 44%
- Mar '19: 53%
- Apr '21: 51%

No (red):
- Mar '08: 24%
- Mar '10: 32%
- Mar '11: 20%
- Apr '12: 23%
- Apr '15: 29%
- Mar '16: 25%
- Apr '17: 27%
- Apr '18: 44%
- Mar '19: 38%
- Apr '21: 42%

Don't know (grey):
- Mar '08: 5%
- Mar '10: 8%
- Mar '11: 1%
- Apr '12: 7%
- Apr '15: 6%
- Mar '16: 4%
- Apr '17: 5%
- Apr '18: 12%
- Mar '19: 8%
- Apr '21: 7%

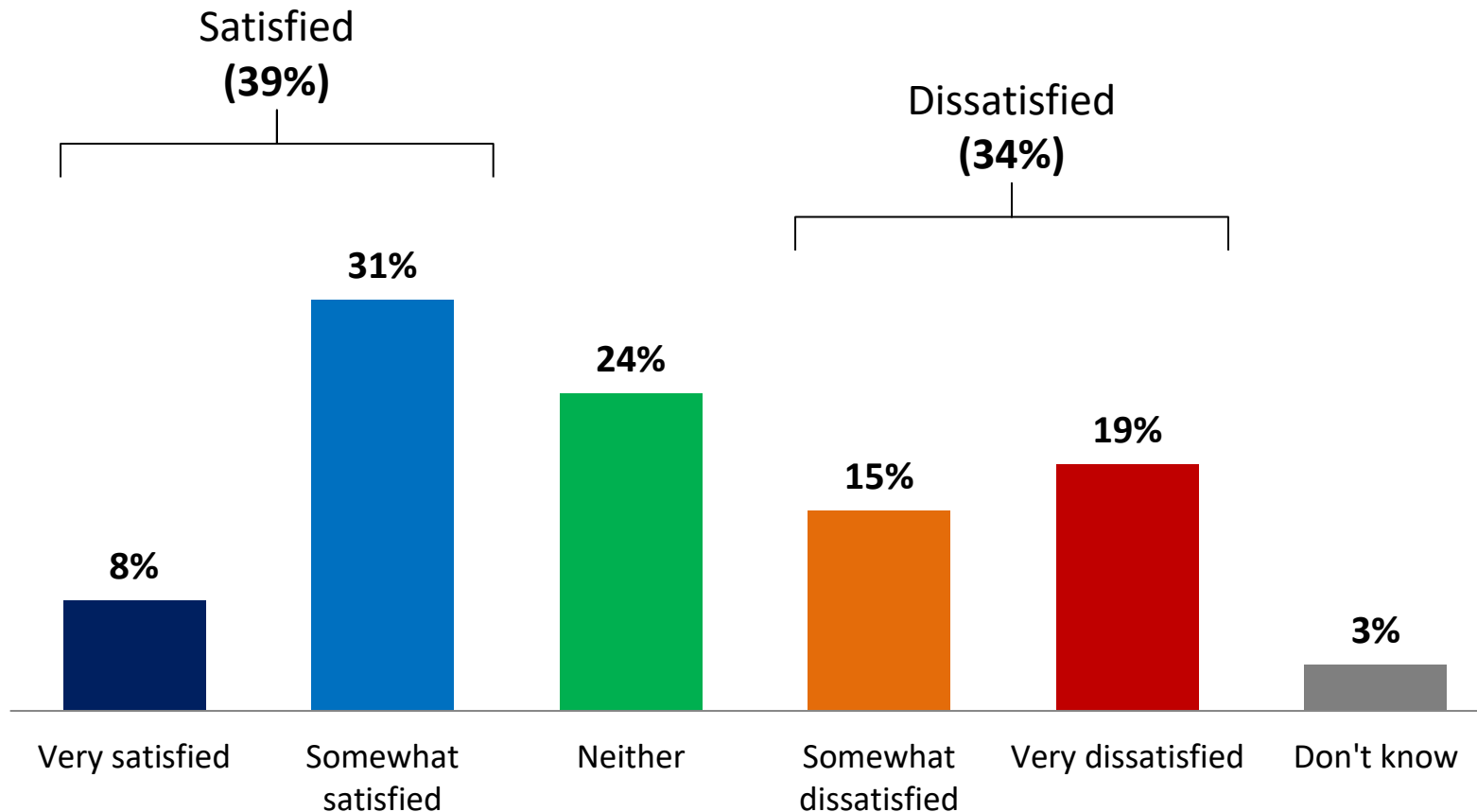Legend: Yes — No — Don't know

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Satisfaction with Budget: Canadians are split on whether they are satisfied (39%) or dissatisfied (34%) with the federal budget

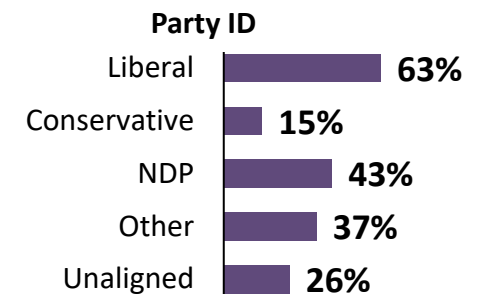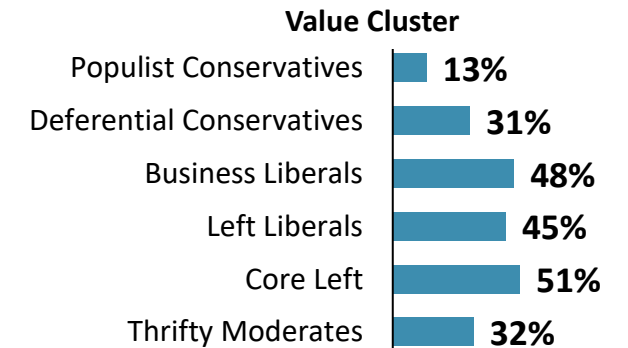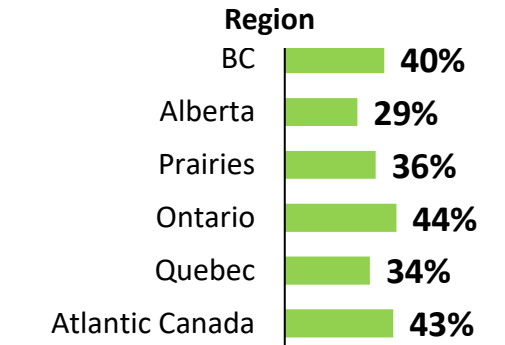**Q** In general, how satisfied are you with the federal budget?
[asked of those aware of budget: n=1,014]

Satisfied (39%)

Dissatisfied (34%)

Very satisfied	Somewhat satisfied	Neither	Somewhat dissatisfied	Very dissatisfied	Don't know
8%	31%	24%	15%	19%	3%

Segmentation
Respondents who say "satisfied"

Region
- BC **40%**
- Alberta **29%**
- Prairies **36%**
- Ontario **44%**
- Quebec **34%**
- Atlantic Canada **43%**

Value Cluster
- Populist Conservatives **13%**
- Deferential Conservatives **31%**
- Business Liberals **48%**
- Left Liberals **45%**
- Core Left **51%**
- Thrifty Moderates **32%**

Party ID
- Liberal **63%**
- Conservative **15%**
- NDP **43%**
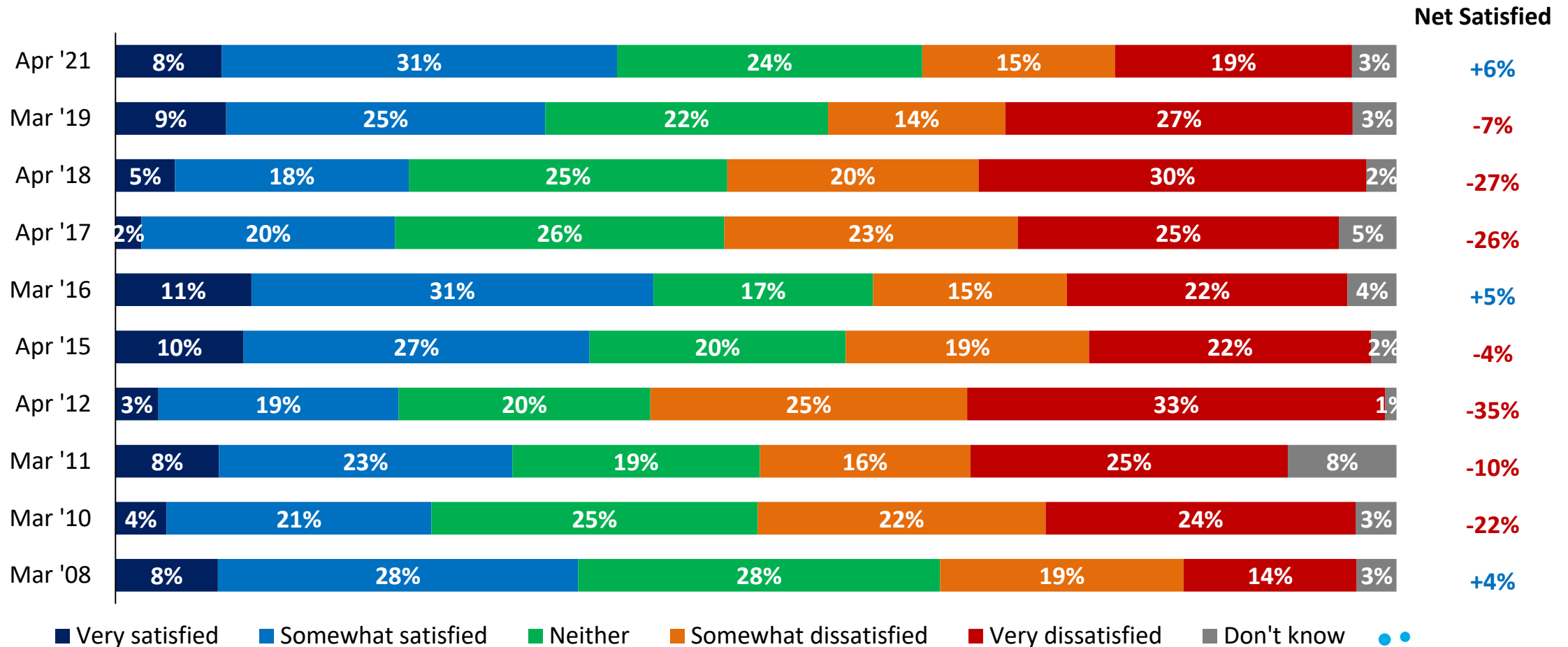- Other **37%**
- Unaligned **26%**

Satisfaction with Budget: Net satisfaction with the budget is up 13 points compared to 2019 and net positive for the first time since 2016

Q In general, how satisfied are you with the federal budget?
[asked of those aware of budget: n=1,014]

Net Satisfied

	Very satisfied	Somewhat satisfied	Neither	Somewhat dissatisfied	Very dissatisfied	Don't know	Net Satisfied
Apr '21	8%	31%	24%	15%	19%	3%	+6%
Mar '19	9%	25%	22%	14%	27%	3%	-7%
Apr '18	5%	18%	25%	20%	30%	2%	-27%
Apr '17	2%	20%	26%	23%	25%	5%	-26%
Mar '16	11%	31%	17%	15%	22%	4%	+5%
Apr '15	10%	27%	20%	19%	22%	2%	-4%
Apr '12	3%	19%	20%	25%	33%	1%	-35%
Mar '11	8%	23%	19%	16%	25%	8%	-10%
Mar '10	4%	21%	25%	22%	24%	3%	-22%
Mar '08	8%	28%	28%	19%	14%	3%	+4%

■ Very satisfied ■ Somewhat satisfied ■ Neither ■ Somewhat dissatisfied ■ Very dissatisfied ■ Don't know
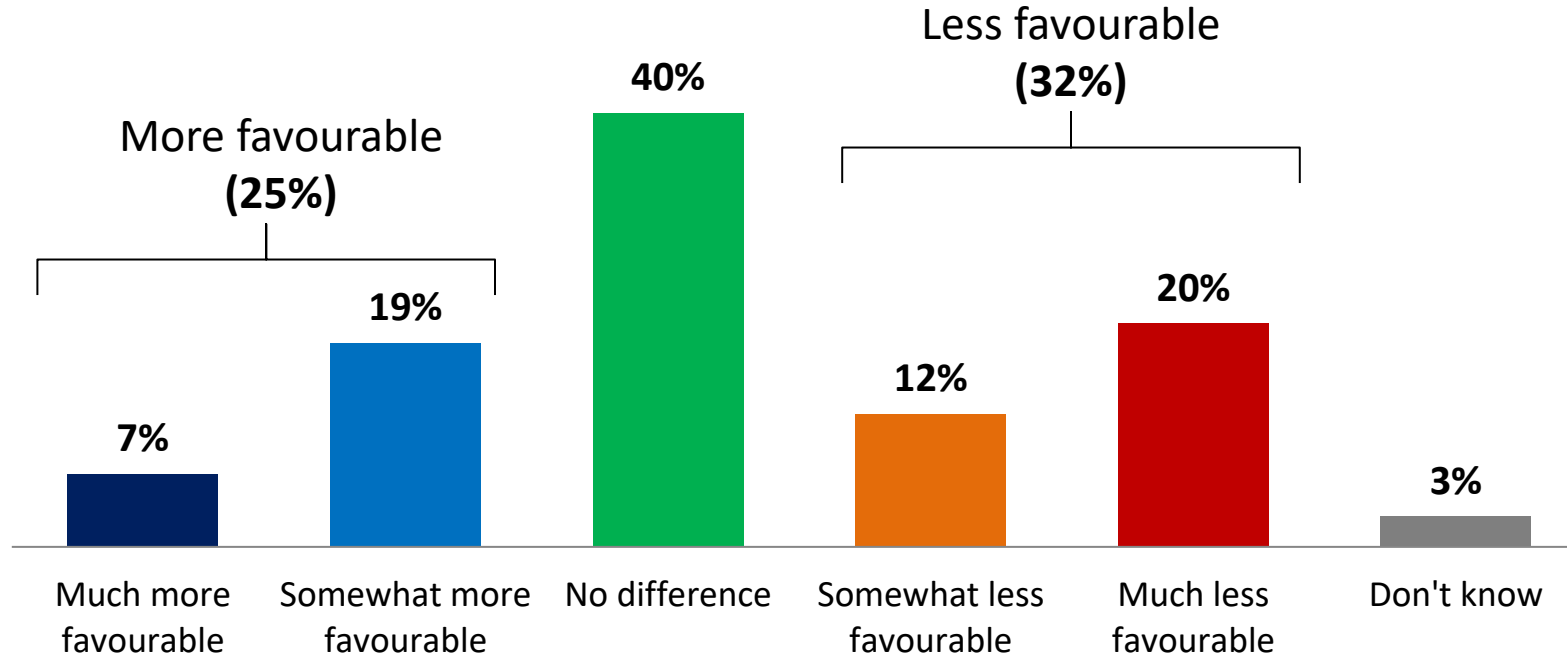
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Impression of Budget: 1-in-3 (32%) Canadians say the budget left them less favourable towards the federal gov't; 49% of Albertans say the same
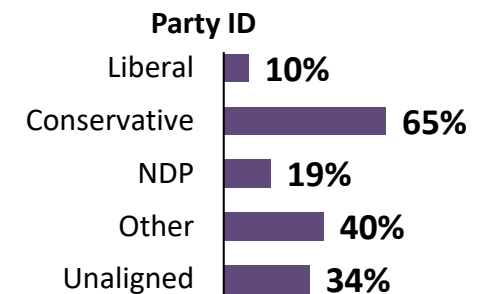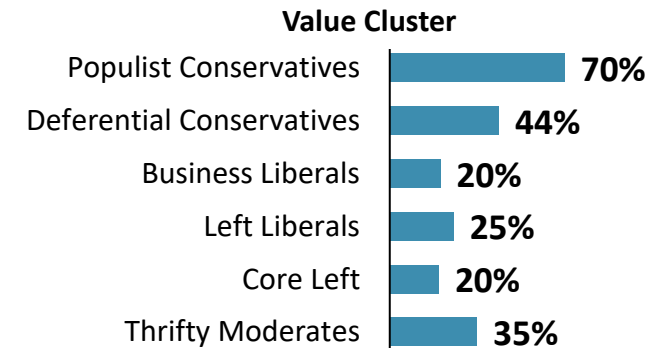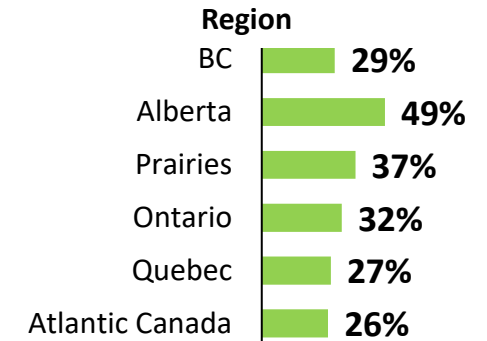
Q Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, a lot less favourable towards the federal government?

[asked of those aware of budget: n=1,014]

More favourable **(25%)**

Less favourable **(32%)**

Much more favourable	Somewhat more favourable	No difference	Somewhat less favourable	Much less favourable	Don't know
7%	19%	40%	12%	20%	3%

Segmentation
Respondents who say "less favourable"

Region

BC	29%
Alberta	49%
Prairies	37%
Ontario	32%
Quebec	27%
Atlantic Canada	26%

Value Cluster

Populist Conservatives	70%
Deferential Conservatives	44%
Business Liberals	20%
Left Liberals	25%
Core Left	20%
Thrifty Moderates	35%

Party ID

Liberal	10%
Conservative	65%
NDP	19%
Other	40%
Unaligned	34%

Impression of Budget: While still negative, net favourability is up 9 points from 2019 to -7%

Q Did it leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable, a lot less favourable towards the federal government?
[asked of those aware of budget: n=1,014]

Net Favorable

	Much more favourable	Somewhat more favourable	No difference	Somewhat less favourable	Much less favourable	Don't know	Net Favorable
Apr '21	7%	19%	40%	12%	20%	3%	-7%
Mar '19	7%	15%	38%	10%	28%	2%	-16%
Apr '18	3%	10%	37%	17%	32%	1%	-36%
Apr '17	2%	10%	39%	22%	25%	2%	-35%
Mar '16	9%	18%	37%	12%	22%	2%	-7%
Apr '15	6%	16%	38%	16%	22%	1%	-16%
Apr '12	2%	10%	33%	22%	32%	1%	-41%
Mar '11	6%	15%	36%	13%	27%	3%	-20%
Mar '10	3%	11%	43%	17%	25%	2%	-28%
Mar '08	5%	15%	48%	16%	15%	1%	-11%

■ Much more favourable ■ Somewhat more favourable ■ No difference
■ Somewhat less favourable ■ Much less favourable ■ Don't know

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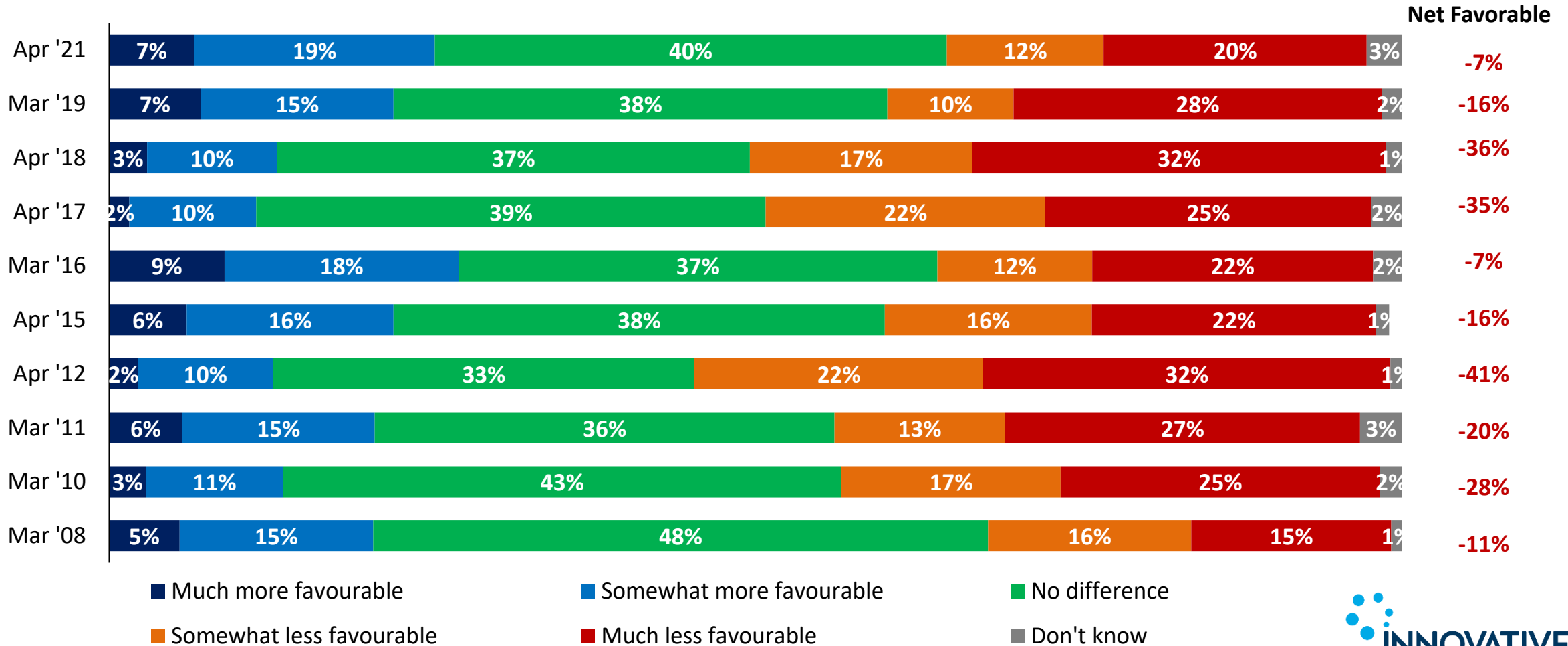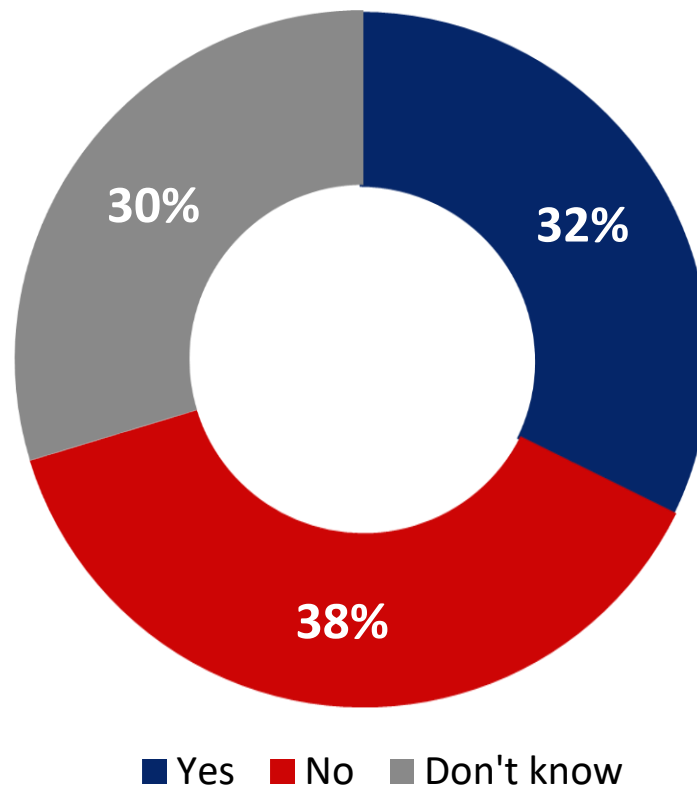
Impacts of the Federal Budget

While satisfaction with the budget is up this year, most Canadians remain torn on the impacts that it will have on the economy, unemployment, economic growth, and the health care system. Around half believe it will result in more taxes and higher user fees.

Personal Impact: 1-in-3 (32%) think their own personal situation will be impacted by the new budget; highest for CPC partisans
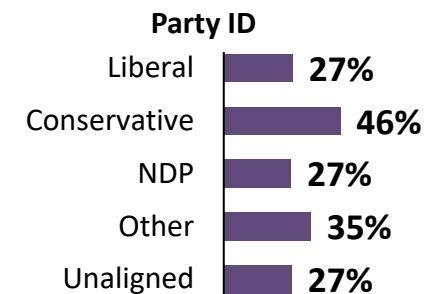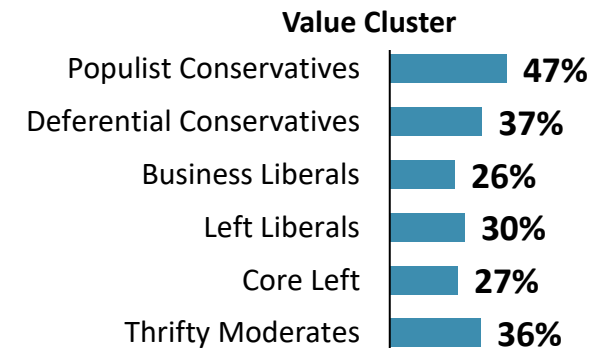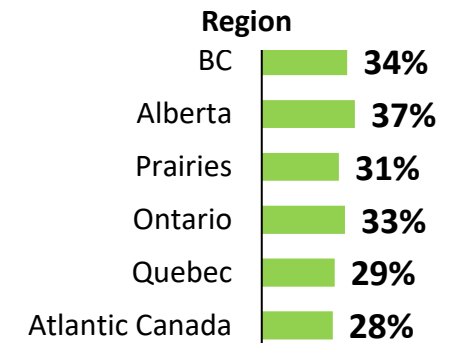
Q Do you think your own personal situation will be directly impacted by the new Liberal federal budget?
[asked of all respondents, n=2,000]

- Yes 32%
- No 38%
- Don't know 30%

Segmentation
Respondents who say "yes"

Region
BC	34%
Alberta	37%
Prairies	31%
Ontario	33%
Quebec	29%
Atlantic Canada	28%

Value Cluster
Populist Conservatives	47%
Deferential Conservatives	37%
Business Liberals	26%
Left Liberals	30%
Core Left	27%
Thrifty Moderates	36%

Party ID
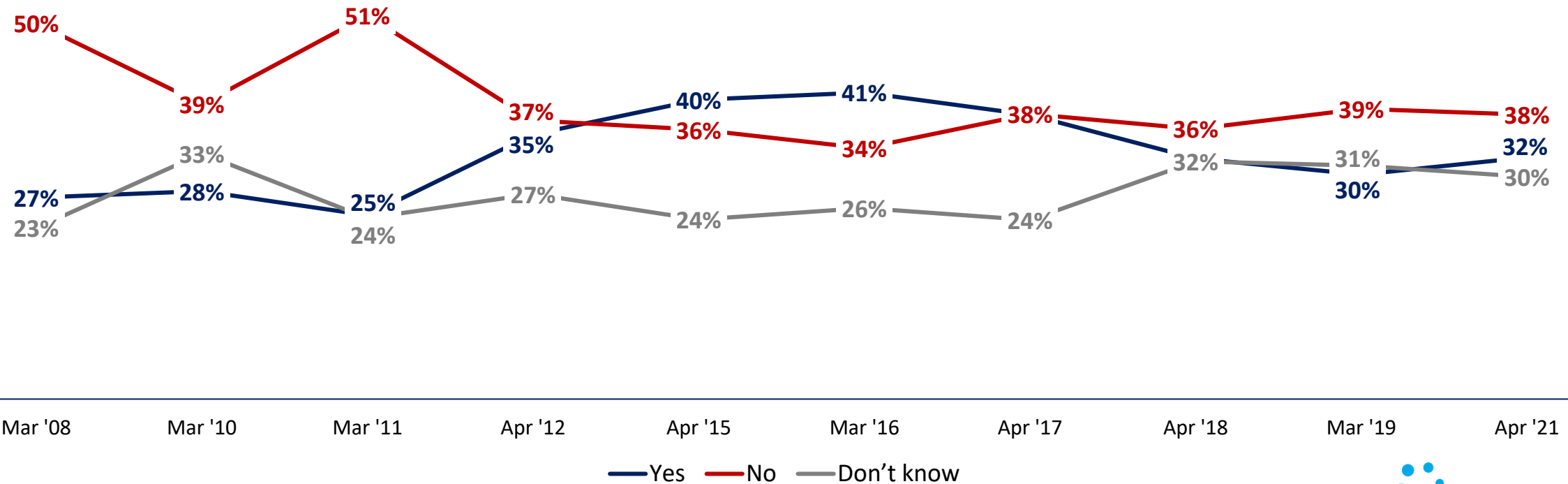| Liberal | 27% |
Conservative	46%
NDP	27%
Other	35%
Unaligned	27%

Personal Impact: The share saying their situation will be directly impacted by the new budget is consistent with the 2019 results

Q Do you think your own personal situation will be directly impacted by the new Liberal federal budget?
[asked of all respondents, n=2,000]

	Mar '08	Mar '10	Mar '11	Apr '12	Apr '15	Mar '16	Apr '17	Apr '18	Mar '19	Apr '21
No	50%	39%	51%	37%	36%	34%	38%	36%	39%	38%
Yes	27%	28%	25%	35%	40%	41%	38%	30%	30%	32%
Don't know	23%	33%	24%	27%	24%	26%	24%	32%	31%	30%

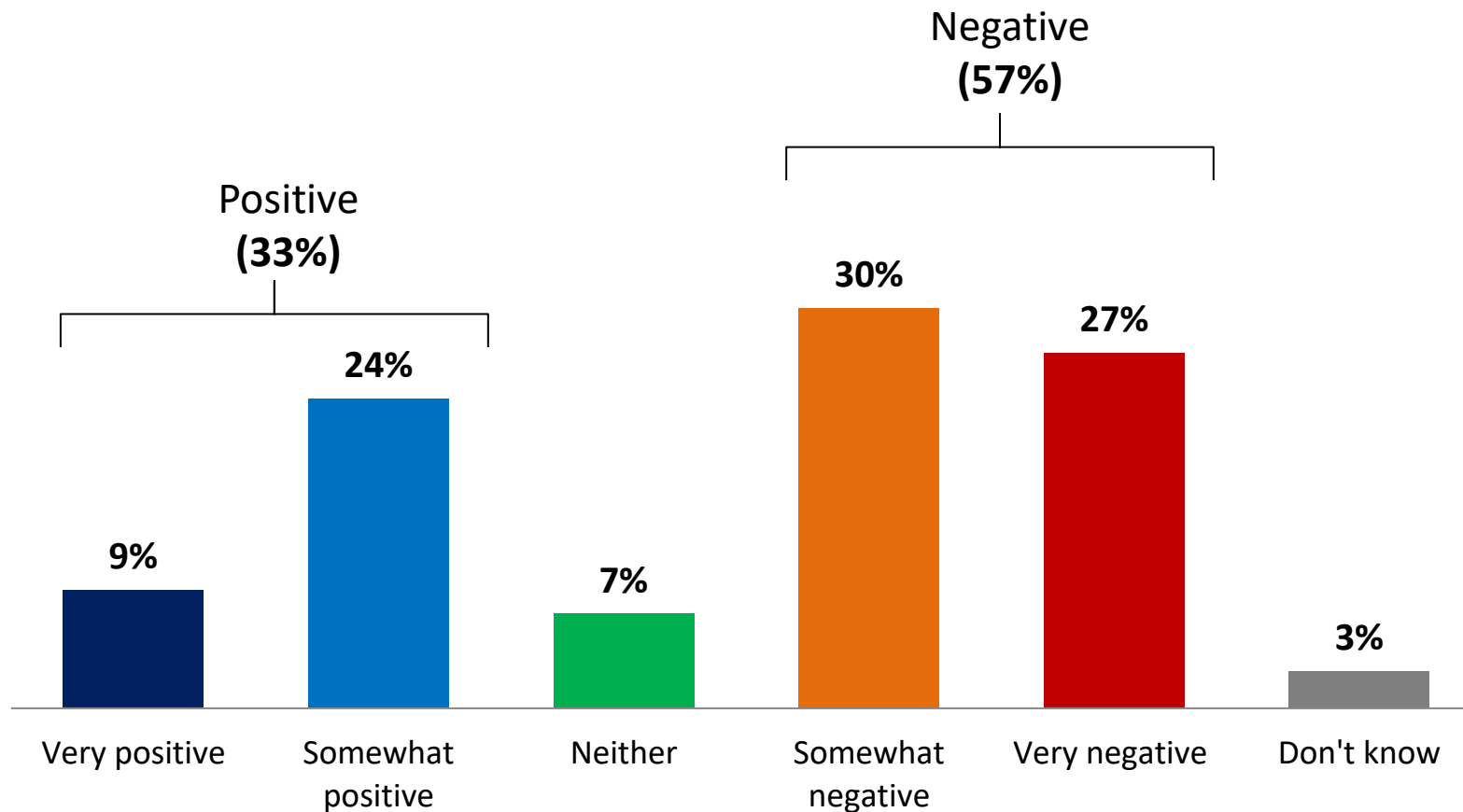— Yes — No — Don't know

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Type of Impact: Of those who say the budget will impact their personal situation, over half (57%) say they expect a negative impact
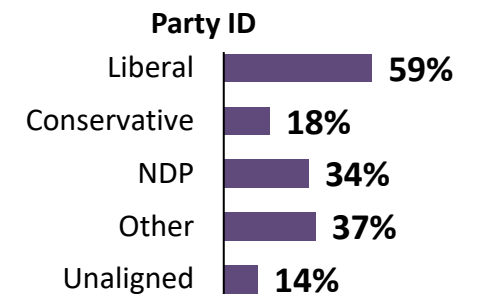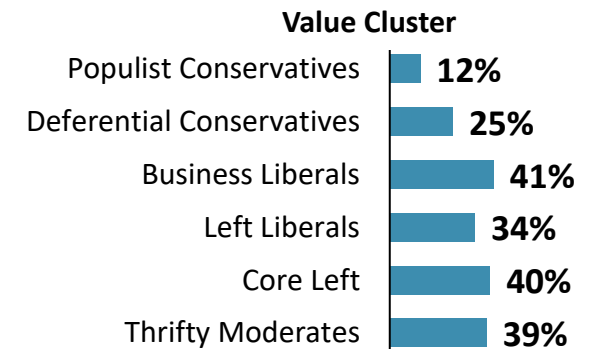
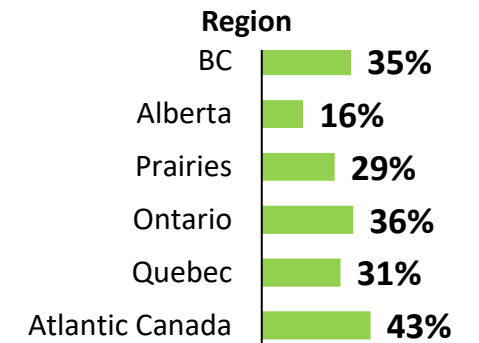**Q** Would that be a positive or a negative impact?
[asked of those who feel they would be impacted: n=644]

Positive
(33%)

Negative
(57%)

9% — Very positive

24% — Somewhat positive

7% — Neither

30% — Somewhat negative

27% — Very negative

3% — Don't know

Segmentation
Respondents who say "positive"

Region

BC	35%
Alberta	16%
Prairies	29%
Ontario	36%
Quebec	31%
Atlantic Canada	43%

Value Cluster

Populist Conservatives	12%
Deferential Conservatives	25%
Business Liberals	41%
Left Liberals	34%
Core Left	40%
Thrifty Moderates	39%

Party ID

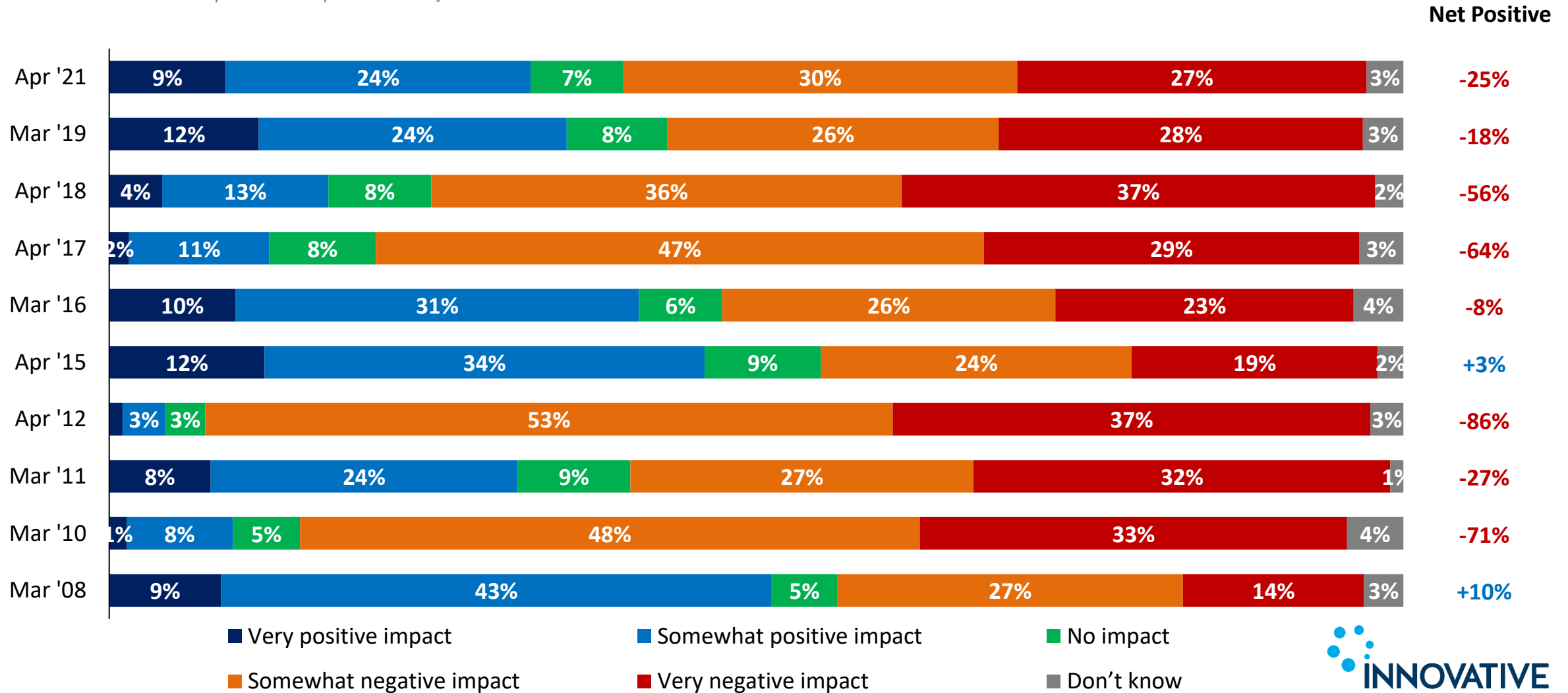|	
Liberal	59%
Conservative	18%
NDP	34%
Other	37%
Unaligned	14%

Type of Impact: Net positive impact is down 6 points compared to 2019[32] from -18% to -25%

Q Would that be a positive or a negative impact?
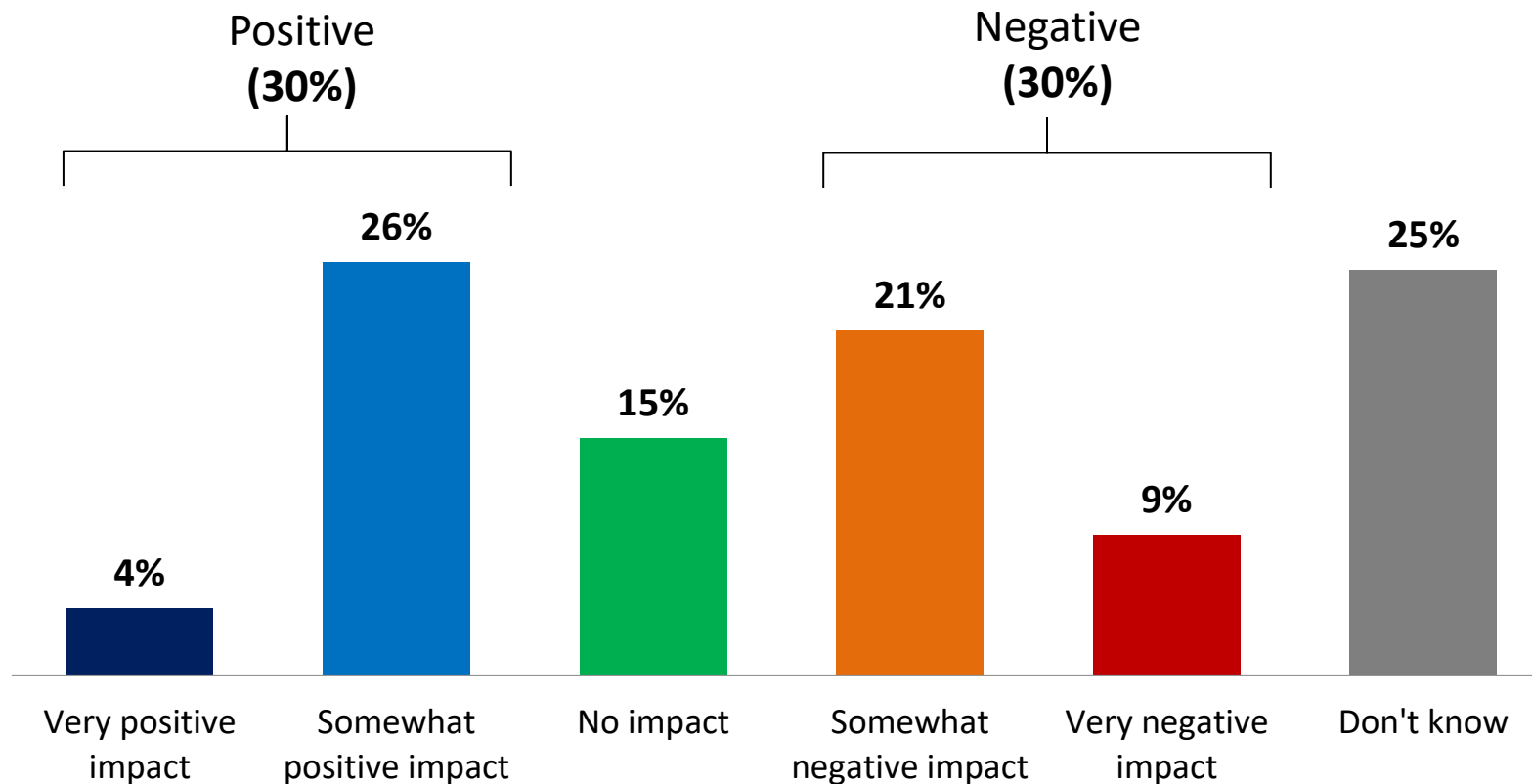[asked of those who feel they would be impacted: n=644]

Net Positive

	Very positive	Somewhat positive	No impact	Somewhat negative	Very negative	Don't know	Net Positive
Apr '21	9%	24%	7%	30%	27%	3%	**-25%**
Mar '19	12%	24%	8%	26%	28%	3%	**-18%**
Apr '18	4%	13%	8%	36%	37%	2%	**-56%**
Apr '17	2%	11%	8%	47%	29%	3%	**-64%**
Mar '16	10%	31%	6%	26%	23%	4%	**-8%**
Apr '15	12%	34%	9%	24%	19%	2%	**+3%**
Apr '12		3%	3%	53%	37%	3%	**-86%**
Mar '11	8%	24%	9%	27%	32%	1%	**-27%**
Mar '10	1%	8%	5%	48%	33%	4%	**-71%**
Mar '08	9%	43%	5%	27%	14%	3%	**+10%**

■ Very positive impact   ■ Somewhat positive impact   ■ No impact

■ Somewhat negative impact   ■ Very negative impact   ■ Don't know

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Impact on Economy: Canadians are split on whether they think the budget will have a positive or negative impact on the economy
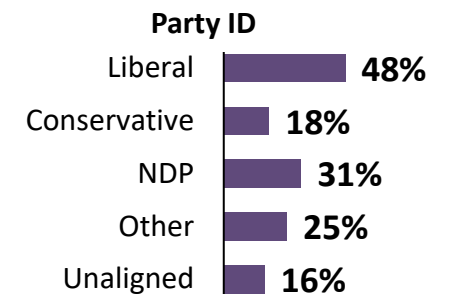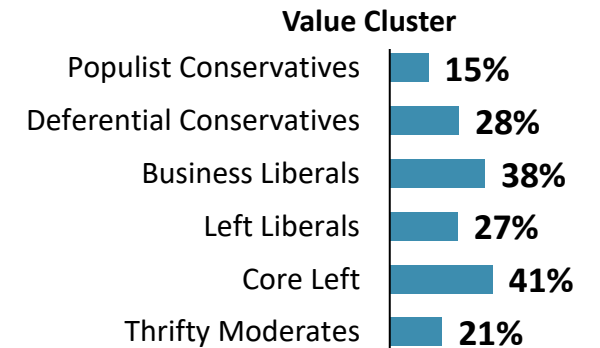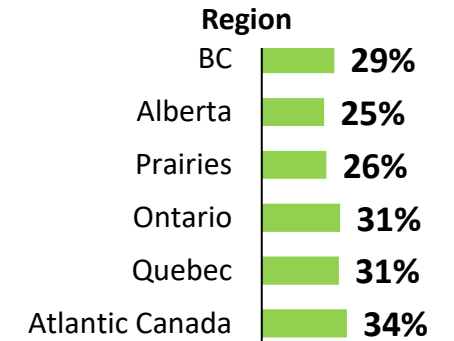
Q Do you think the budget will have a positive or negative impact on the economy?
[asked of all respondents, n=2,000]

Positive (30%)

Negative (30%)

Very positive impact	4%
Somewhat positive impact	26%
No impact	15%
Somewhat negative impact	21%
Very negative impact	9%
Don't know	25%

Segmentation
Respondents who say "positive"

Region
BC	29%
Alberta	25%
Prairies	26%
Ontario	31%
Quebec	31%
Atlantic Canada	34%

Value Cluster
Populist Conservatives	15%
Deferential Conservatives	28%
Business Liberals	38%
Left Liberals	27%
Core Left	41%
Thrifty Moderates	21%

Party ID
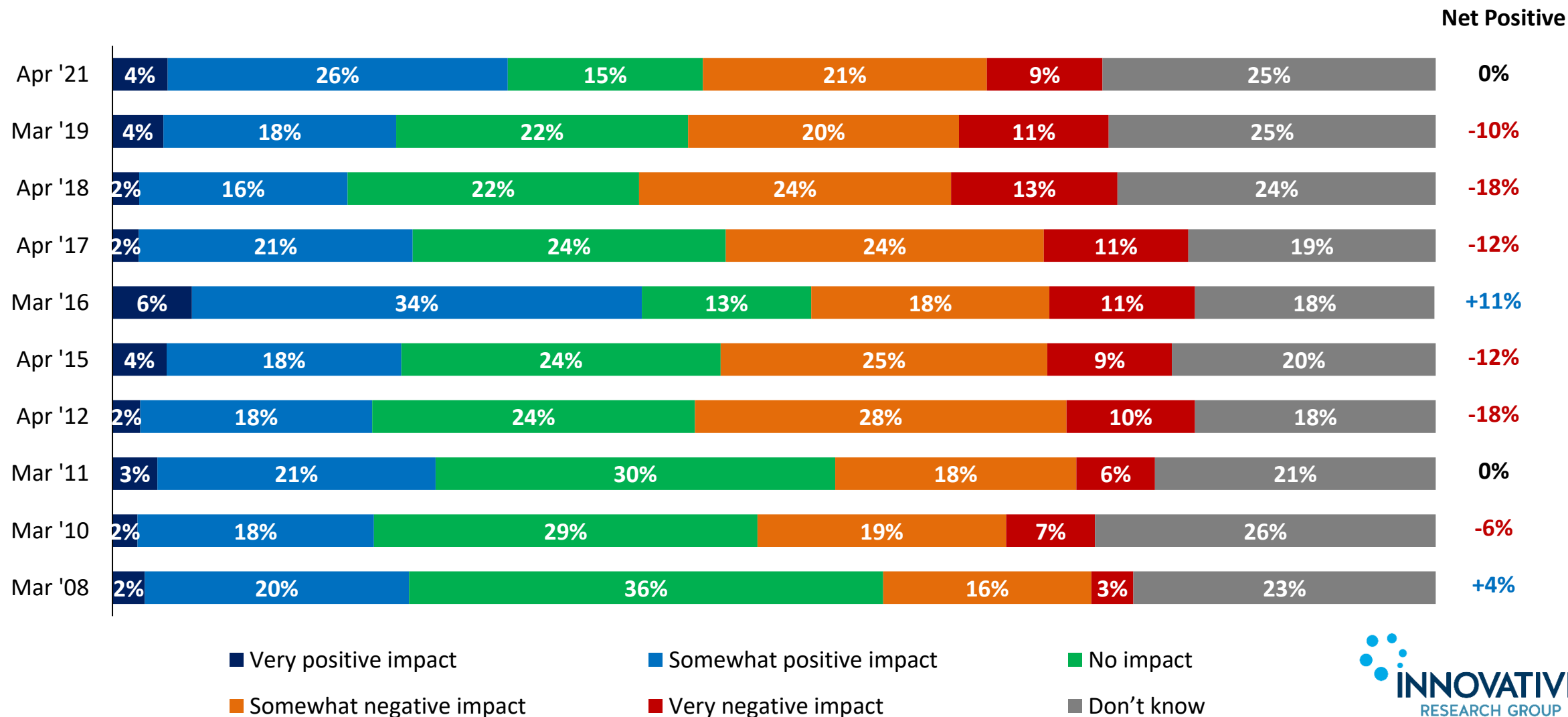|	
Liberal	48%
Conservative	18%
NDP	31%
Other	25%
Unaligned	16%

Impact on Economy: Net positive impact on the economy is up 10 points from 2019 to 0%

Q Do you think the budget will have a positive or negative impact on the economy?
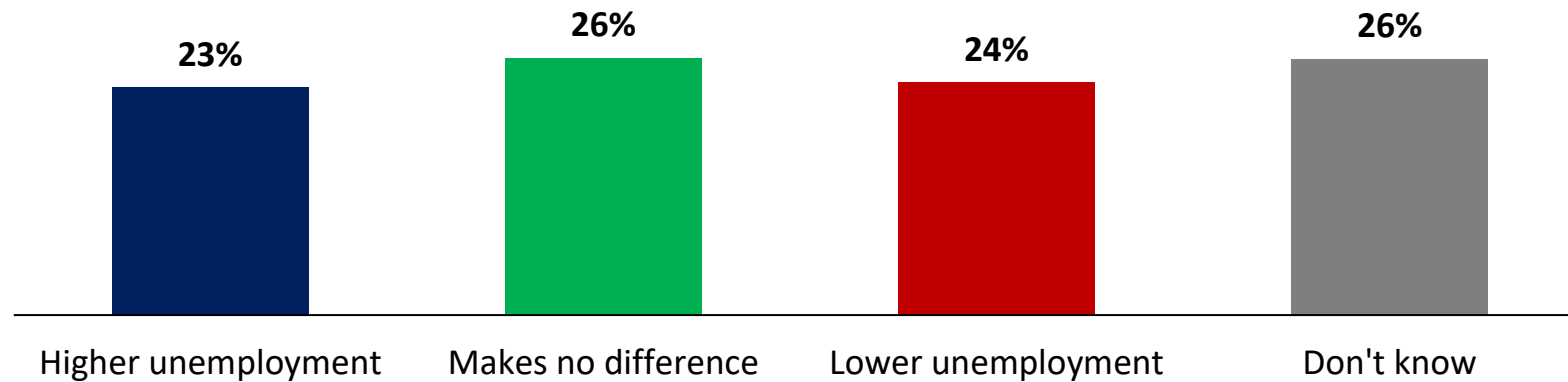[asked of all respondents, n=2,000]

	Very positive impact	Somewhat positive impact	No impact	Somewhat negative impact	Very negative impact	Don't know	Net Positive
Apr '21	4%	26%	15%	21%	9%	25%	0%
Mar '19	4%	18%	22%	20%	11%	25%	-10%
Apr '18	2%	16%	22%	24%	13%	24%	-18%
Apr '17	2%	21%	24%	24%	11%	19%	-12%
Mar '16	6%	34%	13%	18%	11%	18%	+11%
Apr '15	4%	18%	24%	25%	9%	20%	-12%
Apr '12	2%	18%	24%	28%	10%	18%	-18%
Mar '11	3%	21%	30%	18%	6%	21%	0%
Mar '10	2%	18%	29%	19%	7%	26%	-6%
Mar '08	2%	20%	36%	16%	3%	23%	+4%

Legend:
- ■ Very positive impact
- ■ Somewhat positive impact
- ■ No impact
- ■ Somewhat negative impact
- ■ Very negative impact
- ■ Don't know

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Impact on Unemployment: Canadians are split on whether they think the budget will results in higher (23%) or lower (24%) unemployment
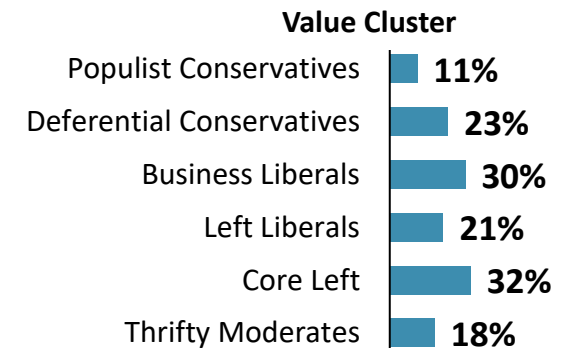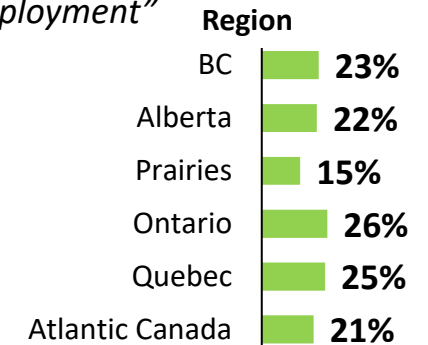
Q Do you think the budget will result higher levels of unemployment, lower levels of unemployment, or will it make no difference?
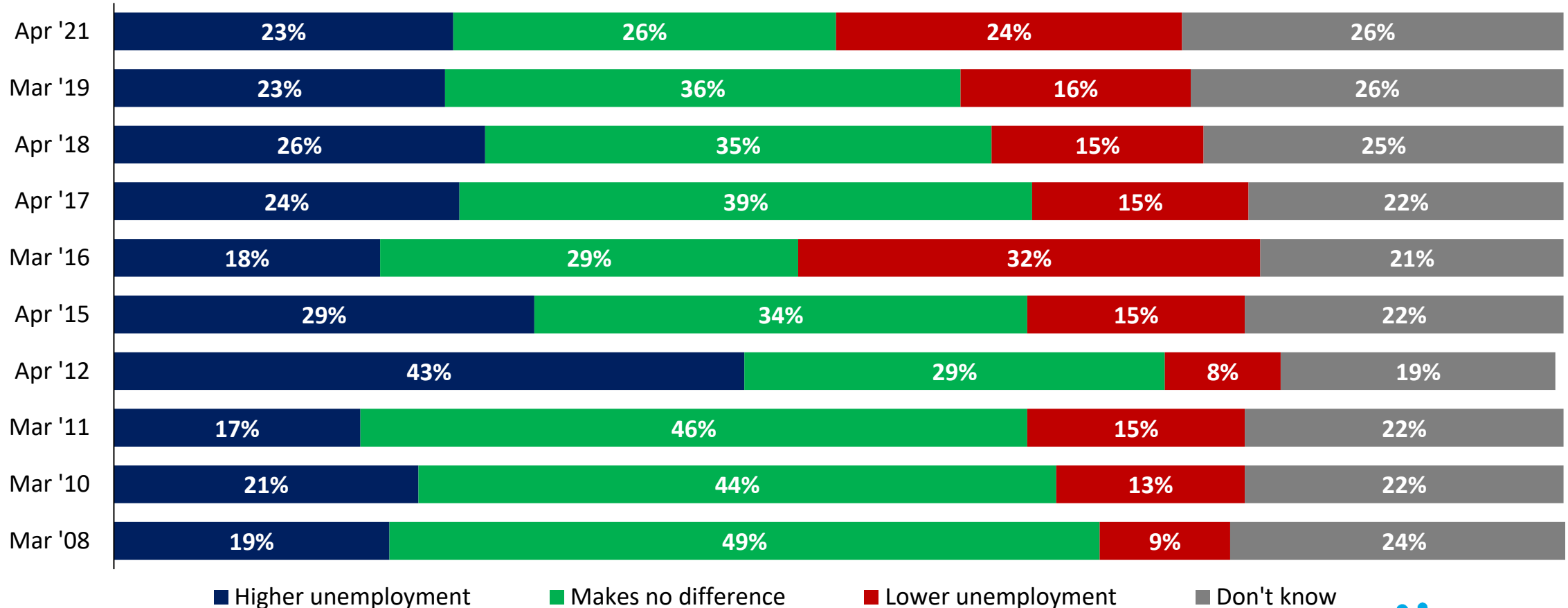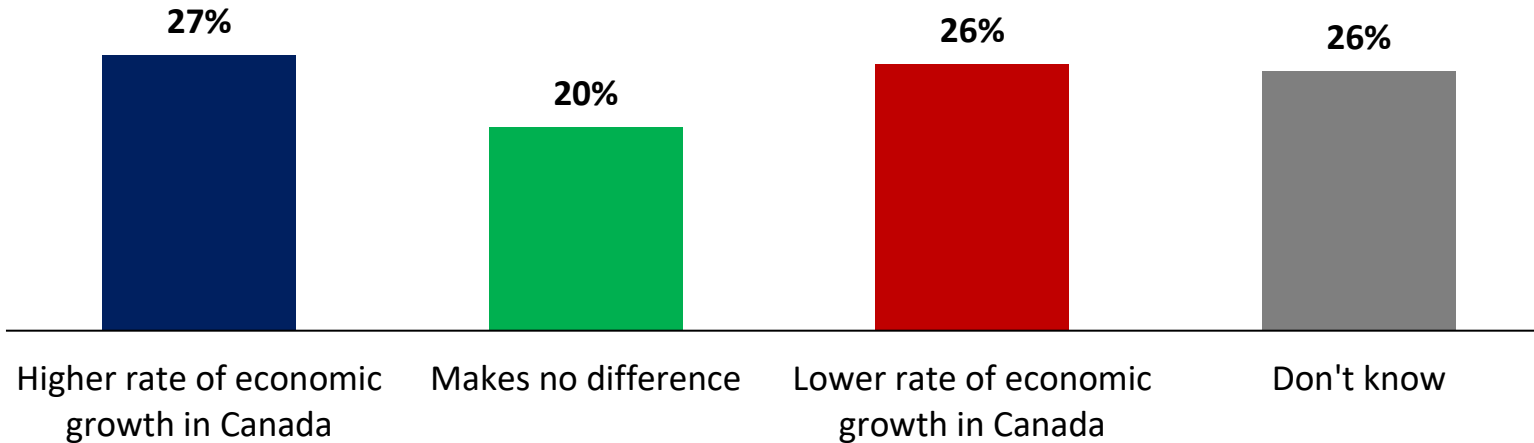[asked of all respondents, n=2,000]

Higher unemployment	Makes no difference	Lower unemployment	Don't know
23%	26%	24%	26%

Segmentation

Respondents who say "lower unemployment"

Region

BC	23%
Alberta	22%
Prairies	15%
Ontario	26%
Quebec	25%
Atlantic Canada	21%

Value Cluster

Populist Conservatives	11%
Deferential Conservatives	23%
Business Liberals	30%
Left Liberals	21%
Core Left	32%
Thrifty Moderates	18%

Party ID

Liberal	37%
Conservative	15%
NDP	27%
Other	26%
Unaligned	11%
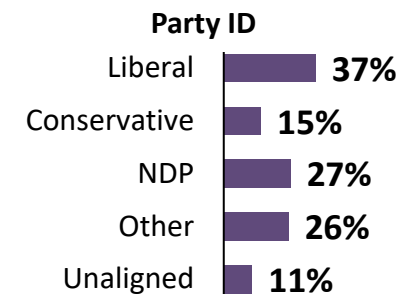
Impact on Unemployment: Perceptions that the budget will result in lower unemployment (24%) are up compared to 2019 (16%)

Q Do you think the budget will result higher levels of unemployment, lower levels of unemployment, or will it make no difference?
[asked of all respondents, n=2,000]

	Higher unemployment	Makes no difference	Lower unemployment	Don't know
Apr '21	23%	26%	24%	26%
Mar '19	23%	36%	16%	26%
Apr '18	26%	35%	15%	25%
Apr '17	24%	39%	15%	22%
Mar '16	18%	29%	32%	21%
Apr '15	29%	34%	15%	22%
Apr '12	43%	29%	8%	19%
Mar '11	17%	46%	15%	22%
Mar '10	21%	44%	13%	22%
Mar '08	19%	49%	9%	24%

■ Higher unemployment ■ Makes no difference ■ Lower unemployment ■ Don't know

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Impact on Economic Growth: Canadians are split on whether the budget will result in a higher or lower rate of economic growth

Q Do you think the budget will result a higher rate of economic growth in Canada, a lower rate of economic growth in Canada or will it make no difference?
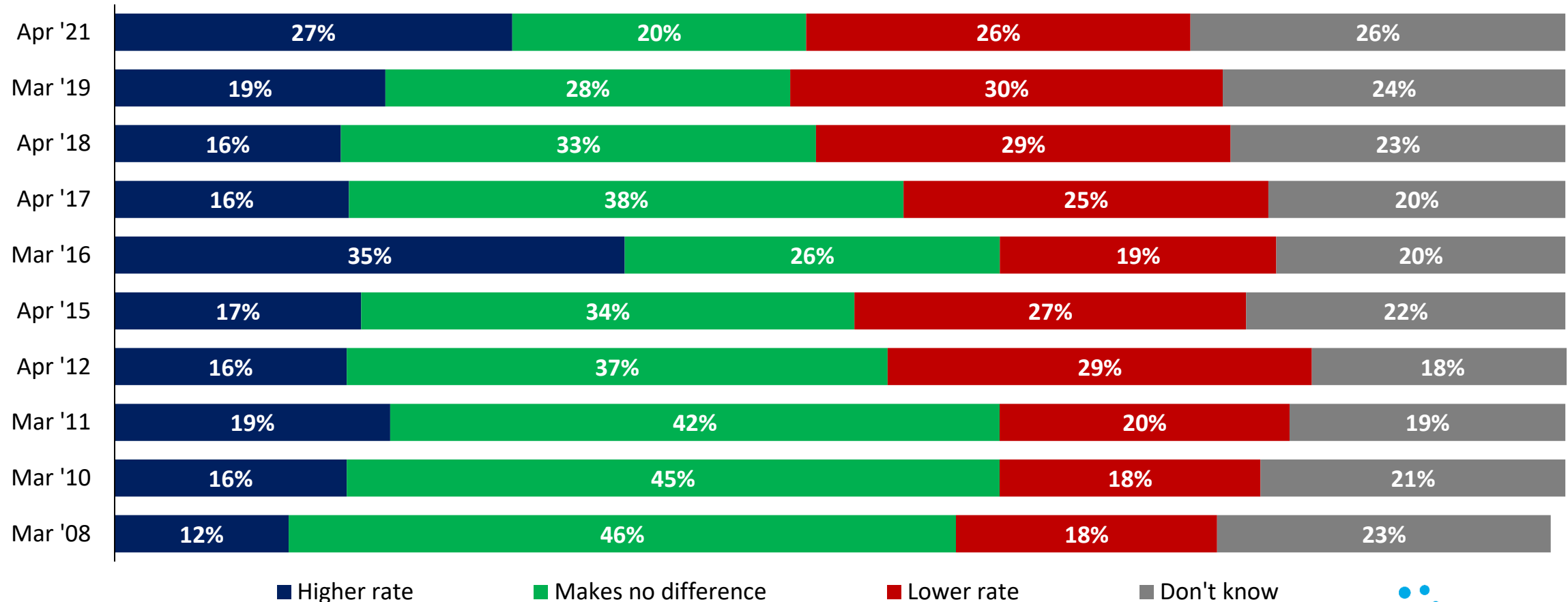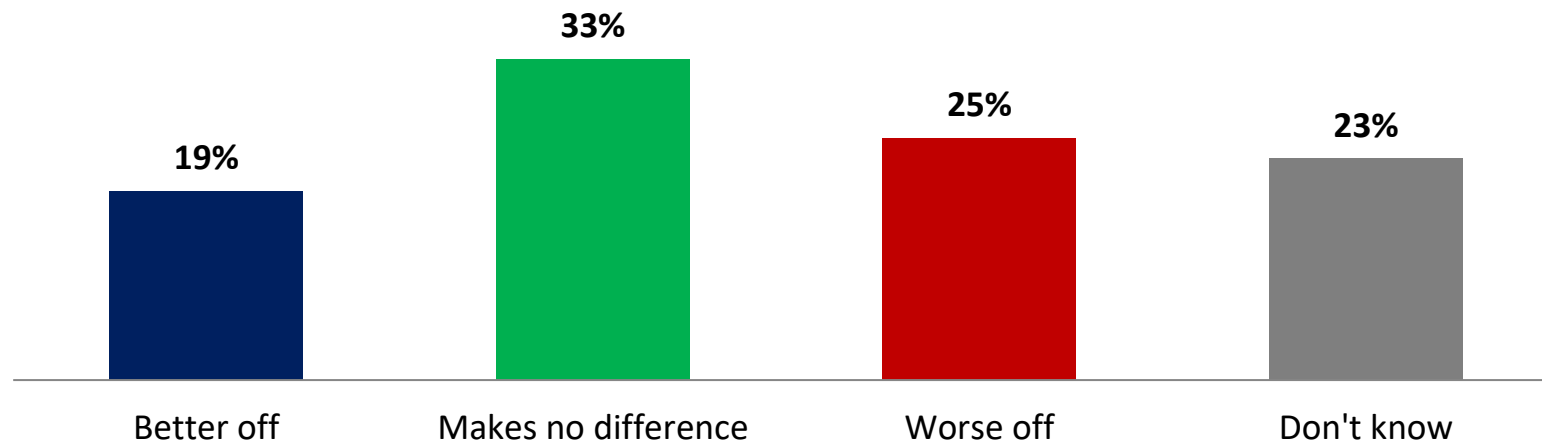[asked of all respondents, n=2,000]

27%
Higher rate of economic growth in Canada

20%
Makes no difference

26%
Lower rate of economic growth in Canada

26%
Don't know

Segmentation
Respondents who say "lower rate"

Region
- BC **23%**
- Alberta **38%**
- Prairies **29%**
- Ontario **26%**
- Quebec **25%**
- Atlantic Canada **24%**

Value Cluster
- Populist Conservatives **50%**
- Deferential Conservatives **29%**
- Business Liberals **20%**
- Left Liberals **28%**
- Core Left **16%**
- Thrifty Moderates **28%**

Party ID
- Liberal **14%**
- Conservative **49%**
- NDP **20%**
- Other **33%**
- Unaligned **21%**
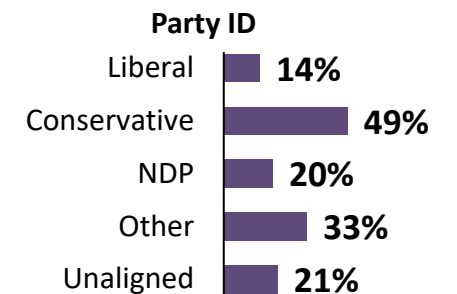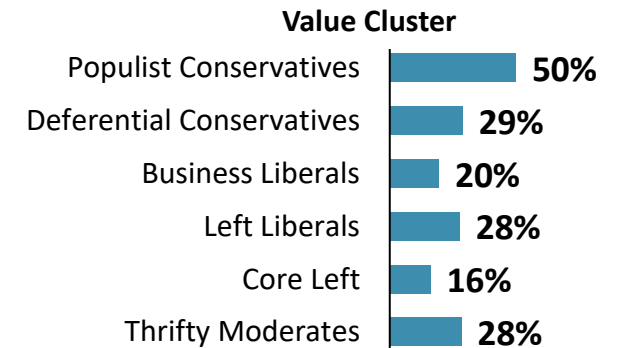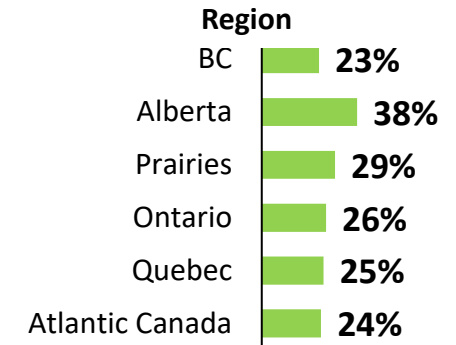
Impact on Economic Growth: The share saying the budget will result in a higher rate of economic growth is up 9 points from 2019

Q Do you think the budget will result a higher rate of economic growth in Canada, a lower rate of economic growth in Canada or will it make no difference?
[asked of all respondents, n=2,000]

	Higher rate	Makes no difference	Lower rate	Don't know
Apr '21	27%	20%	26%	26%
Mar '19	19%	28%	30%	24%
Apr '18	16%	33%	29%	23%
Apr '17	16%	38%	25%	20%
Mar '16	35%	26%	19%	20%
Apr '15	17%	34%	27%	22%
Apr '12	16%	37%	29%	18%
Mar '11	19%	42%	20%	19%
Mar '10	16%	45%	18%	21%
Mar '08	12%	46%	18%	23%

■ Higher rate ■ Makes no difference ■ Lower rate ■ Don't know

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Impact on Health Care: A plurality (33%) say the budget will make no difference to the health care system while 25% say 'worse off'

Q Do you think the budget will leave the Canadian health care system better off, worse off or will it make no difference?
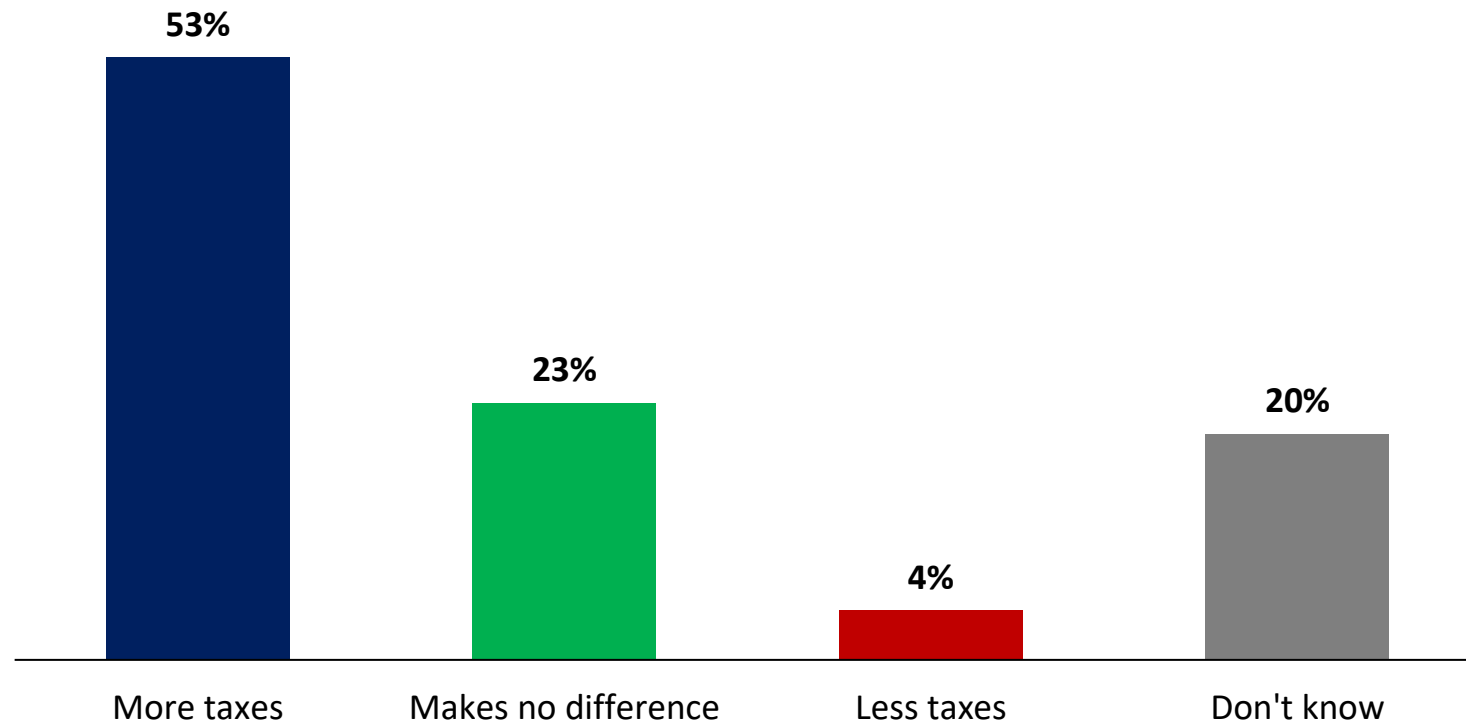[asked of all respondents, n=2,000]

Category	Value
Better off	19%
Makes no difference	33%
Worse off	25%
Don't know	23%

Segmentation
Respondents who say "better off"

Region

BC	23%
Alberta	13%
Prairies	13%
Ontario	20%
Quebec	23%
Atlantic Canada	15%

Value Cluster

Populist Conservatives	8%
Deferential Conservatives	21%
Business Liberals	25%
Left Liberals	18%
Core Left	23%
Thrifty Moderates	15%

Party ID

Liberal	34%
Conservative	11%
NDP	18%
Other	18%
Unaligned	7%
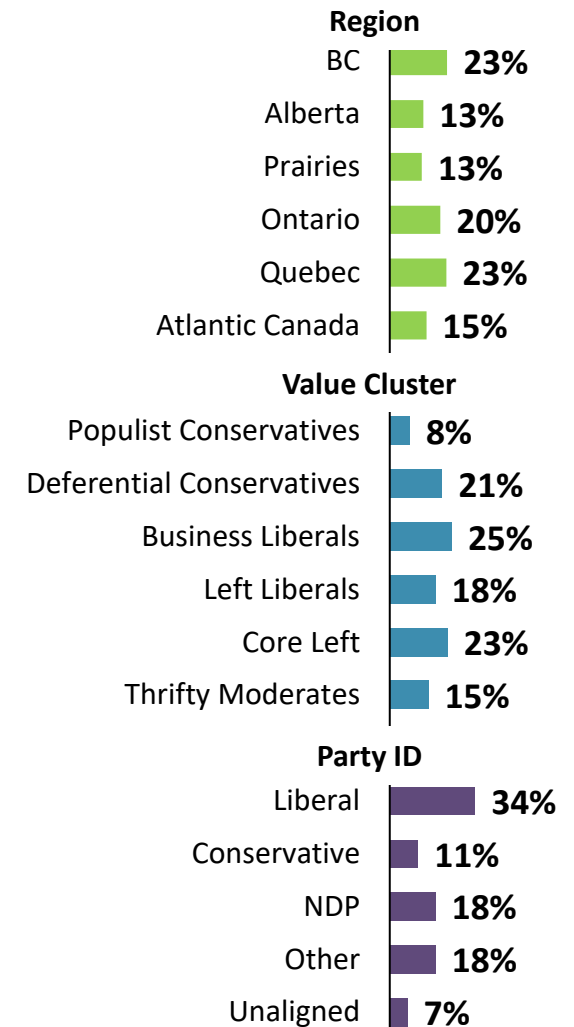
Impact on Health Care: Those saying the budget will leave the health care system better off is up compared to 2019; still, more say 'worse off'

Q Do you think the budget will leave the Canadian health care system better off, worse off or will it make no difference?
[asked of all respondents, n=2,000]

	Better off	Makes no difference	Worse off	Don't know
Apr '21	19%	33%	25%	23%
Mar '19	15%	36%	24%	24%
Apr '18	11%	41%	26%	22%
Apr '17	9%	45%	26%	20%
Mar '16	14%	42%	19%	25%
Apr '15	7%	37%	38%	18%
Apr '12	4%	37%	37%	22%
Mar '11	5%	52%	23%	20%
Mar '10	3%	42%	32%	22%
Mar '08	4%	52%	24%	20%

■ Better off ■ Makes no difference ■ Worse off ■ Don't know

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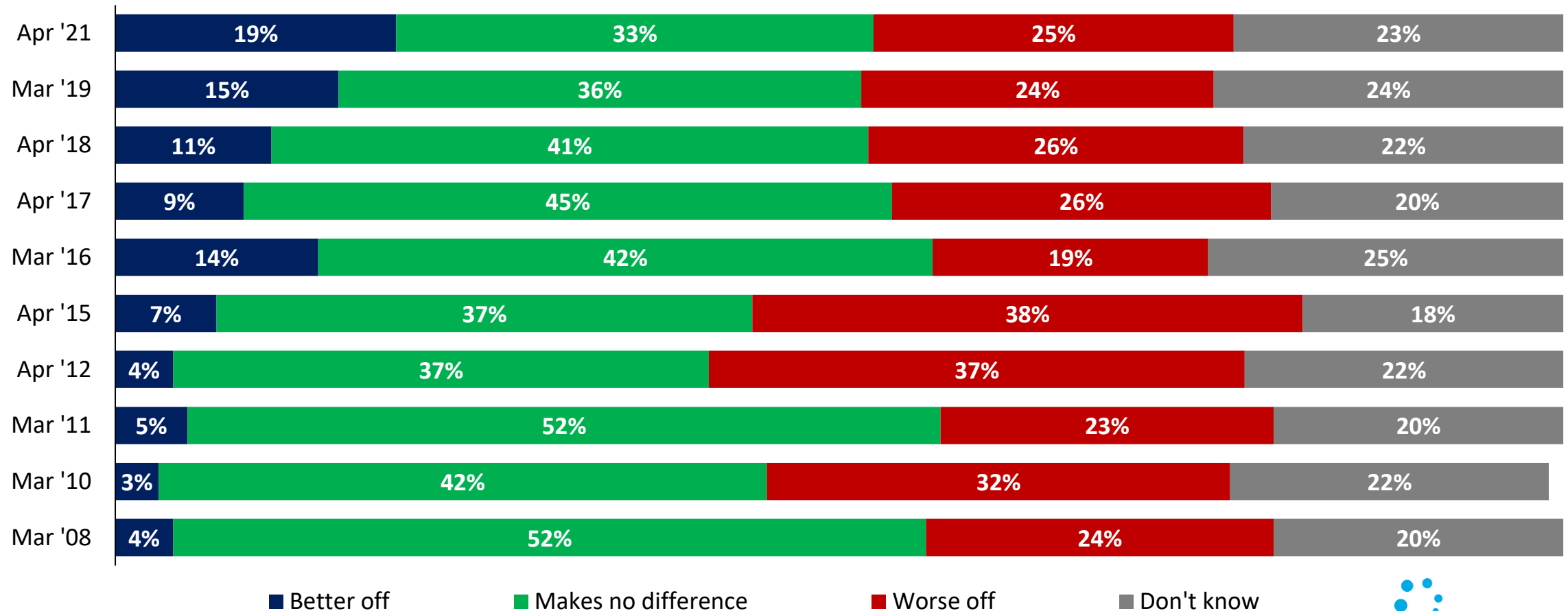
Impact on Taxes: Just over half (53%) of Canadians think the budget will results in more taxes; highest among populist conservatives

Q Do you think the budget will result in you paying more taxes, less taxes, or will it make no difference?
[asked of all respondents, n=2,000]

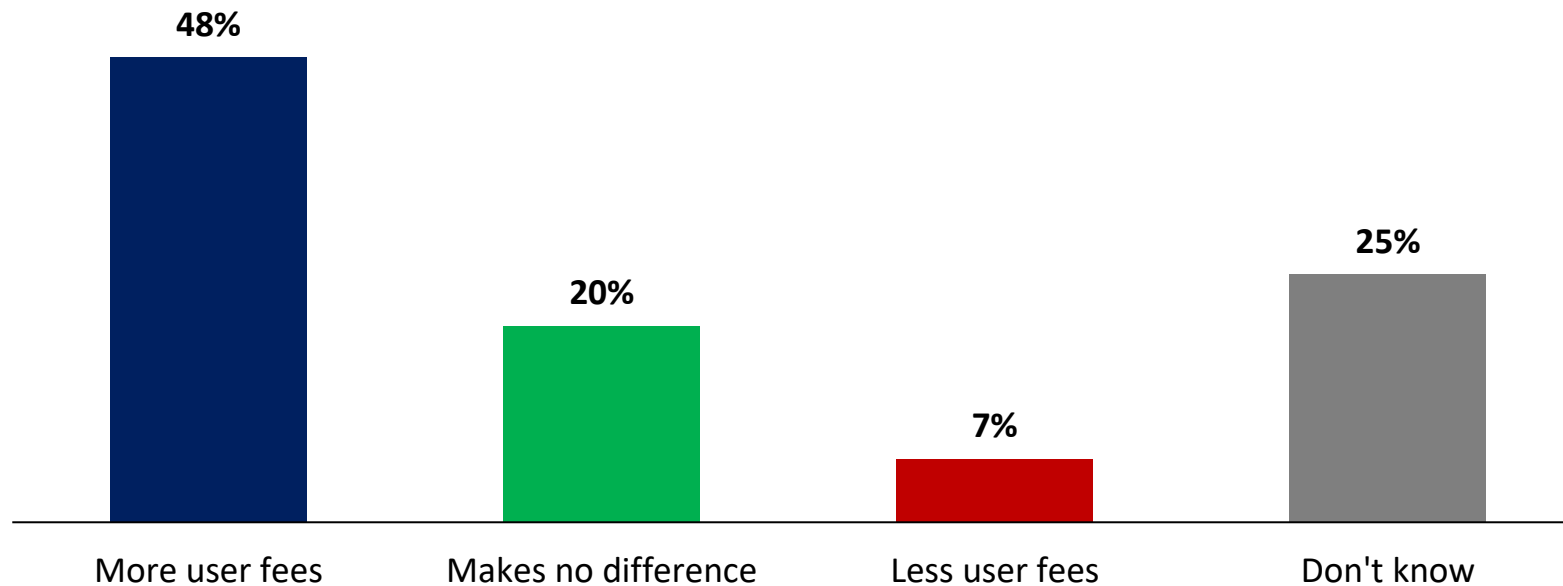More taxes: 53%
Makes no difference: 23%
Less taxes: 4%
Don't know: 20%

Segmentation
Respondents who say "more taxes"

Region
BC	55%
Alberta	61%
Prairies	59%
Ontario	55%
Quebec	47%
Atlantic Canada	43%

Value Cluster
Populist Conservatives	77%
Deferential Conservatives	63%
Business Liberals	47%
Left Liberals	54%
Core Left	40%
Thrifty Moderates	51%

Party ID
Liberal	44%
Conservative	76%
NDP	44%
Other	52%
Unaligned	49%
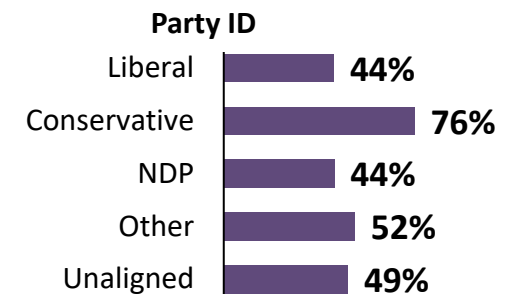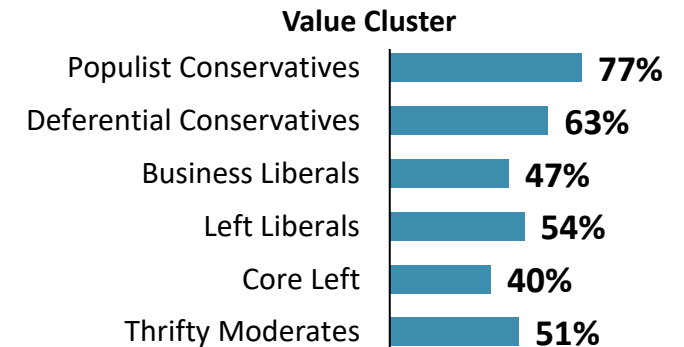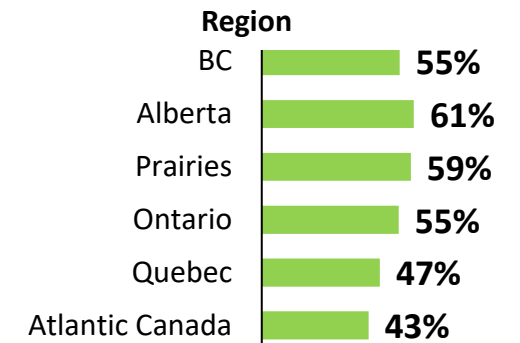
Impact on Taxes: The share who think the budget will result in paying more taxes is up 12 points compared to 2019

Q Do you think the budget will result in you paying more taxes, less taxes, or will it make no difference?
[asked of all respondents, n=2,000]

	More taxes	Makes no difference	Less taxes	Don't know
Apr '21	53%	23%	4%	20%
Mar '19	41%	31%	6%	22%
Apr '18	49%	30%	4%	17%
Apr '17	52%	28%	4%	16%
Mar '16	42%	27%	14%	17%
Apr '15	30%	38%	16%	17%
Apr '12	37%	44%	3%	16%
Mar '11	32%	41%	9%	18%
Mar '10	44%	34%	4%	18%
Mar '08	25%	42%	17%	16%

■ More taxes   ■ Makes no difference   ■ Less taxes   ■ Don't know

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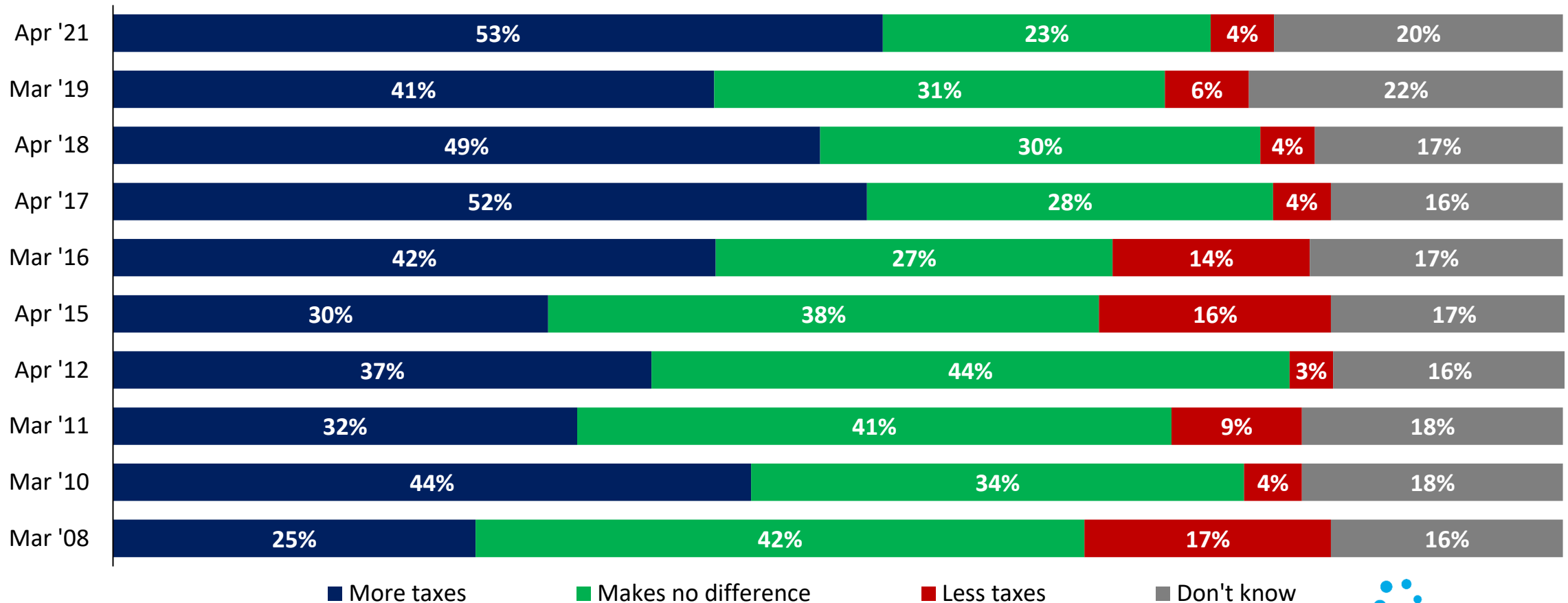
Impact on User fees: Nearly half (48%) of Canadians think the budget will result in paying more user fees for government services

Q Do you think the budget will result in you paying more user fees for government services, less user fees for government services or will it make no difference?
[asked of all respondents, n=2,000]

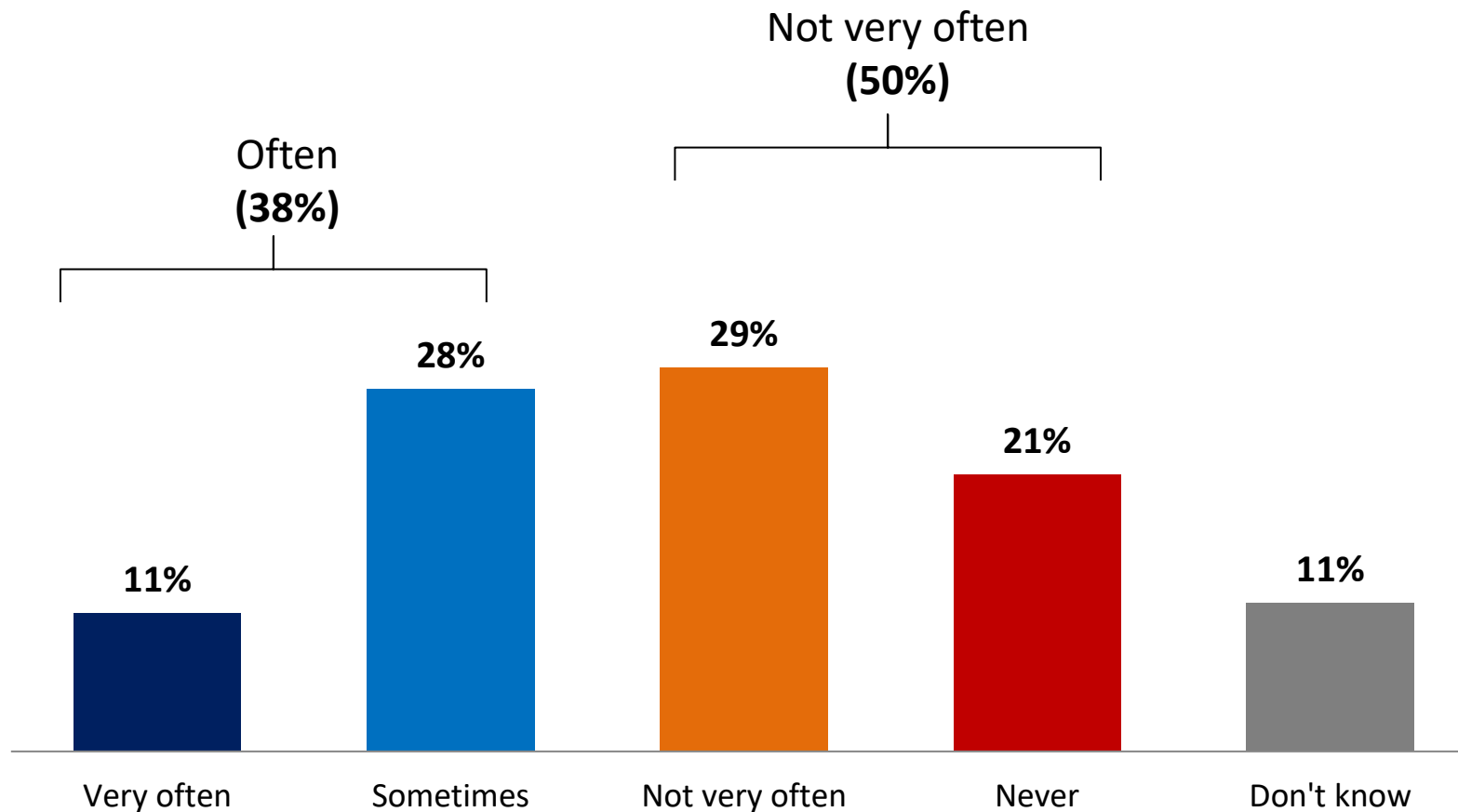| Category	Value
More user fees	48%
Makes no difference	20%
Less user fees	7%
Don't know	25%

Segmentation
Respondents who say "more user fees"

Region

BC	49%
Alberta	55%
Prairies	42%
Ontario	51%
Quebec	42%
Atlantic Canada	39%

Value Cluster

Populist Conservatives	67%
Deferential Conservatives	55%
Business Liberals	45%
Left Liberals	49%
Core Left	37%
Thrifty Moderates	45%

Party ID

Liberal	41%
Conservative	68%
NDP	45%
Other	49%
Unaligned	39%
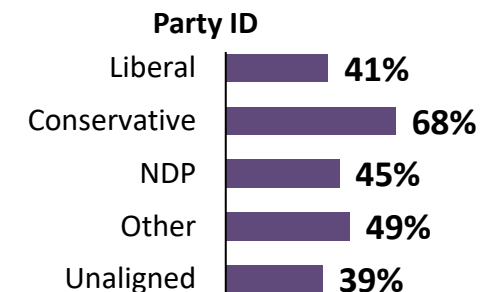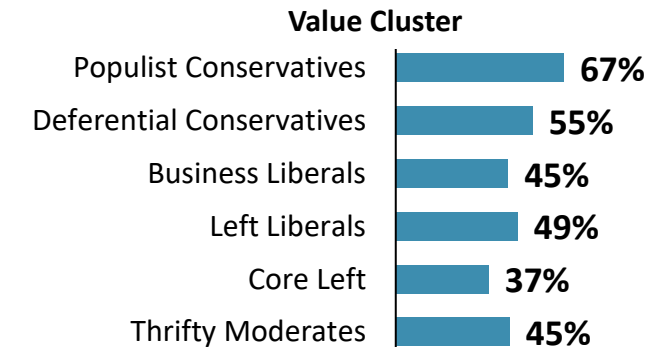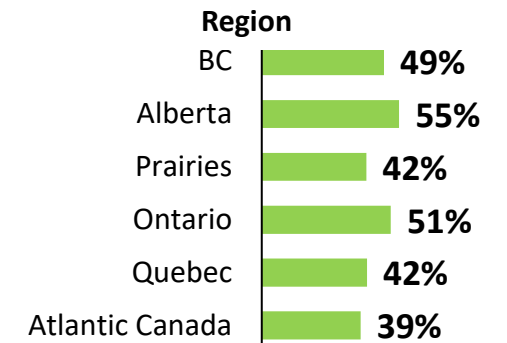
Impact on User fees: The share saying the budget will result in more user fees is back up to 2017 levels after dropping to 39% in 2019

Q Do you think the budget will result in you paying more user fees for government services, less user fees for government services or will it make no difference?
[asked of all respondents, n=2,000]

	More user fees	Makes no difference	Less user fees	Don't know
Apr '21	48%	20%	7%	25%
Mar '19	39%	27%	6%	27%
Apr '18	45%	26%	5%	24%
Apr '17	49%	26%	4%	21%
Mar '16	35%	30%	6%	29%
Apr '15	46%	25%	6%	23%
Apr '12	52%	26%	1%	20%
Mar '11	35%	35%	1%	29%
Mar '10	54%	22%	1%	22%
Mar '08	37%	33%	2%	28%

■ More user fees   ■ Makes no difference   ■ Less user fees   ■ Don't know

INNOVATIVE RESEARCH GROUP
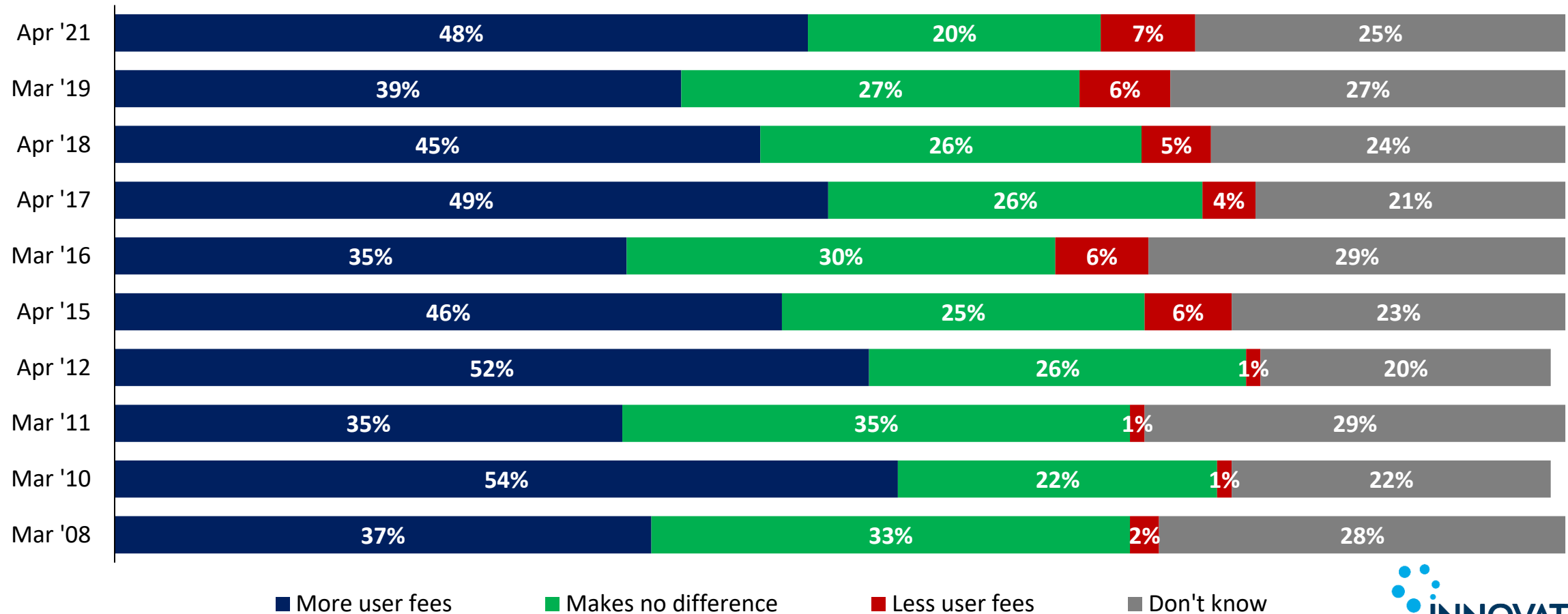
Emotions and the Federal Budget

While 1-in-3 Canadians report feeling angry 'often' when thinking about the budget, anger is at its lowest point since our 2016 tracking.

Anxiety: Half (50%) report feeling anxious 'not very often' or 'never' when thinking about the budget while 38% say they've felt anxious often

Q When you think about the new federal budget, how often have you felt **anxious**?
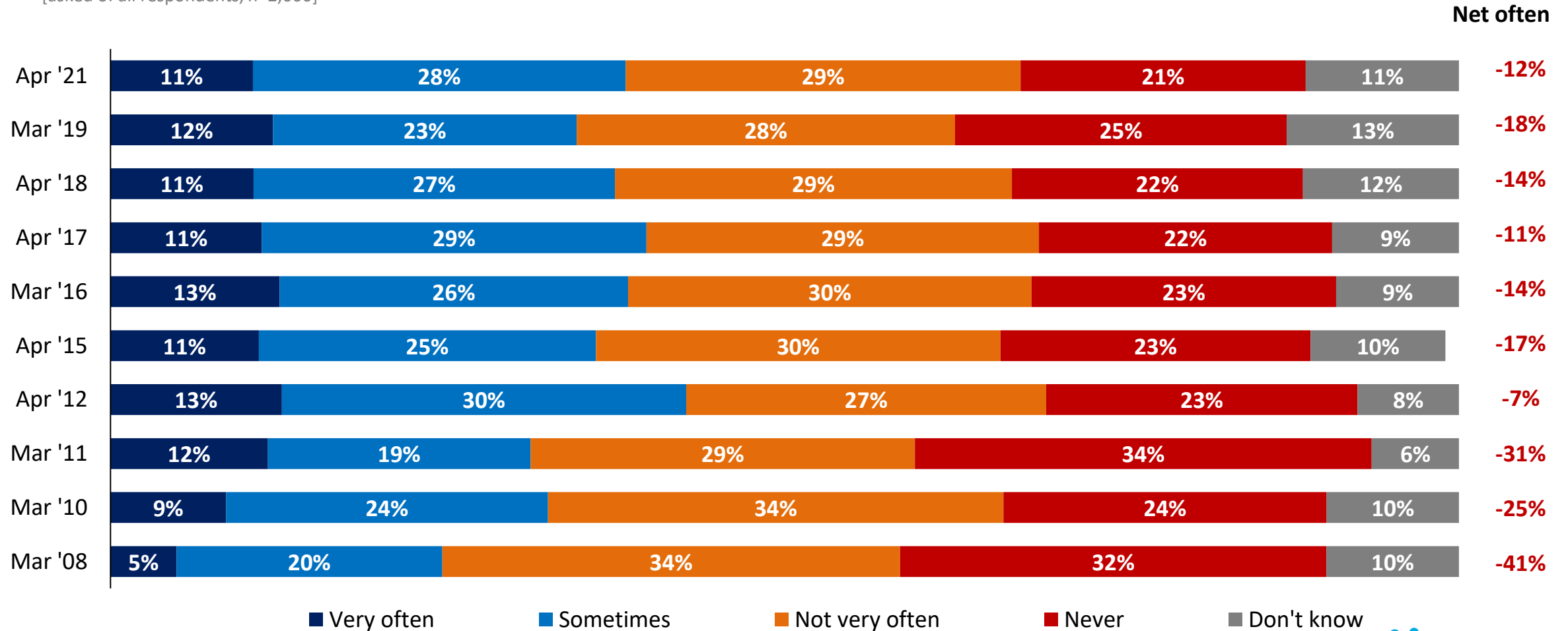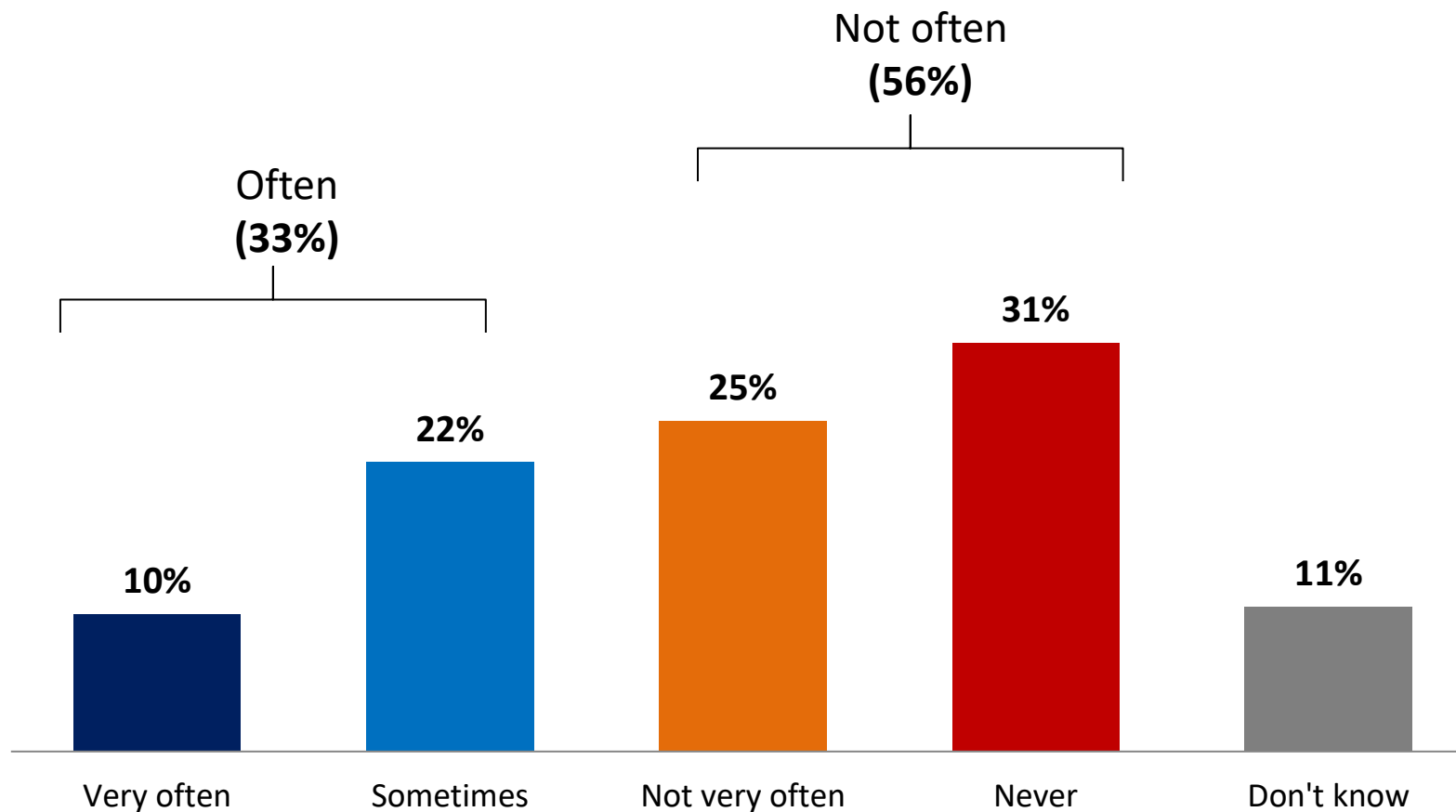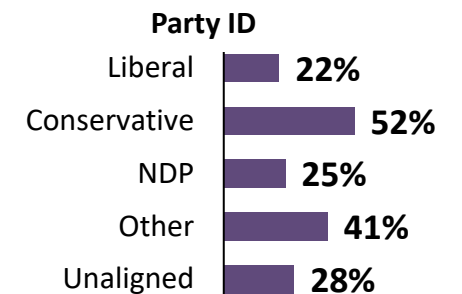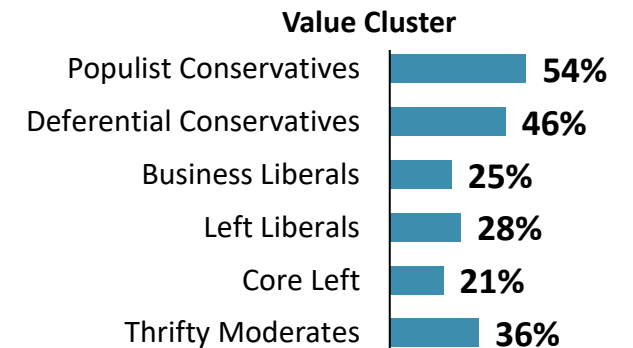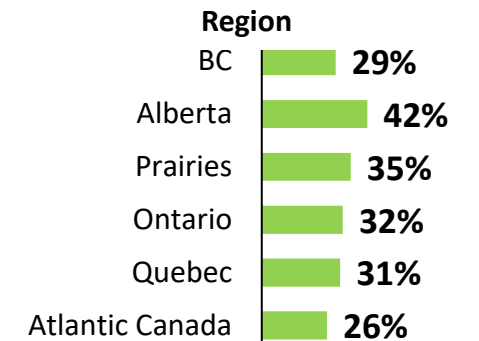[asked of all respondents, n=2,000]

Often (38%)

Not very often (50%)

- Very often: 11%
- Sometimes: 28%
- Not very often: 29%
- Never: 21%
- Don't know: 11%

Segmentation
Respondents who say "often"

Region
- BC: 36%
- Alberta: 44%
- Prairies: 34%
- Ontario: 36%
- Quebec: 44%
- Atlantic Canada: 32%

Value Cluster
- Populist Conservatives: 54%
- Deferential Conservatives: 49%
- Business Liberals: 34%
- Left Liberals: 35%
- Core Left: 25%
- Thrifty Moderates: 42%

Party ID
- Liberal: 32%
- Conservative: 53%
- NDP: 34%
- Other: 47%
- Unaligned: 30%
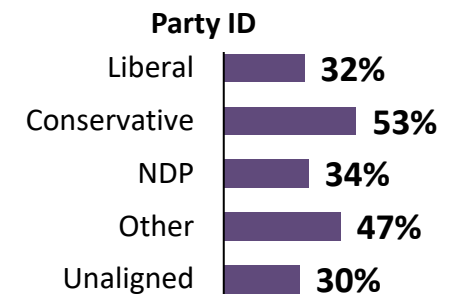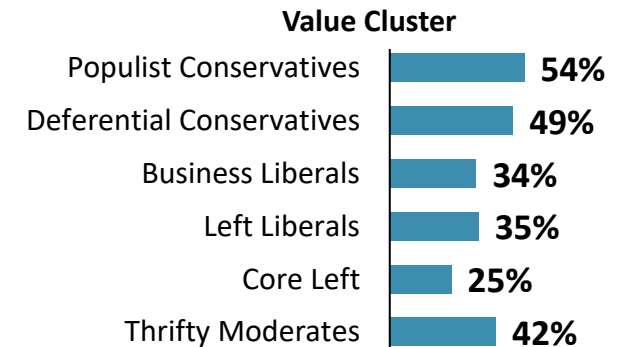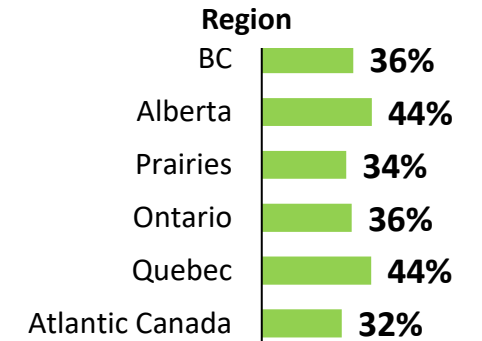
Anxiety: 'Net often' on feeling anxious when thinking about the budget is up 6 points compared to 2019

Q When you think about the new federal budget, how often have you felt **anxious**?
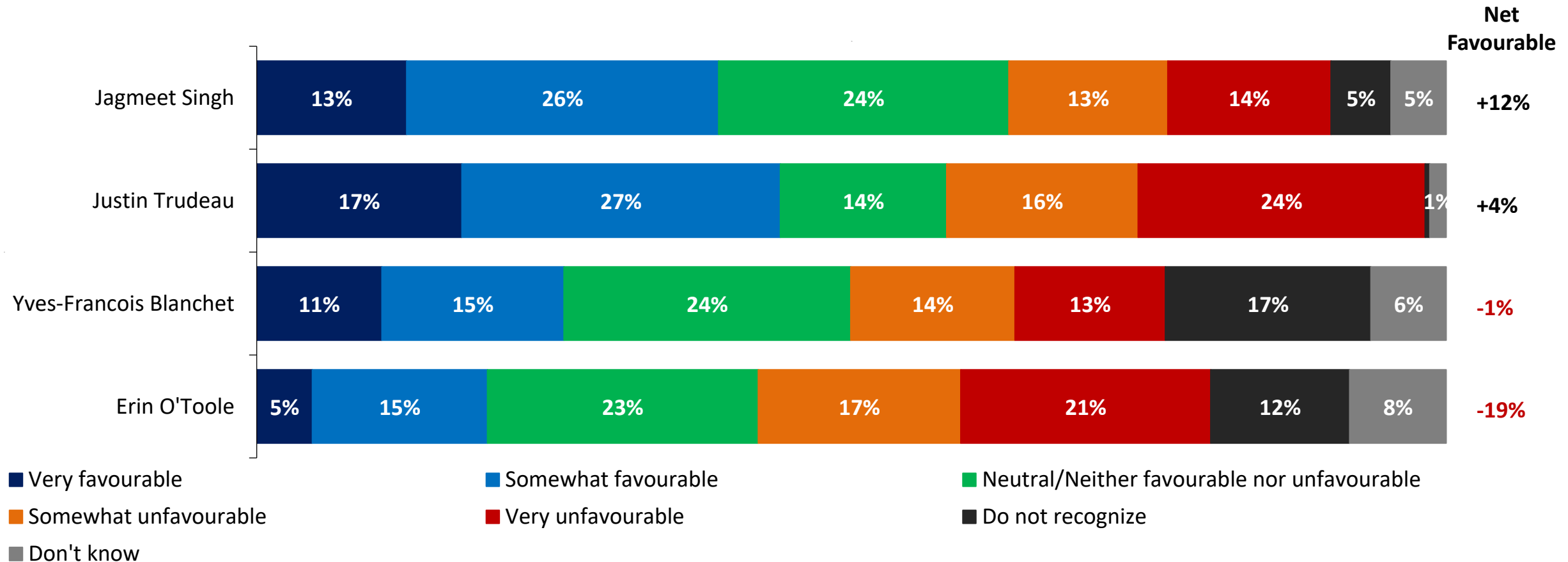[asked of all respondents, n=2,000]

Net often

	Very often	Sometimes	Not very often	Never	Don't know	Net often
Apr '21	11%	28%	29%	21%	11%	-12%
Mar '19	12%	23%	28%	25%	13%	-18%
Apr '18	11%	27%	29%	22%	12%	-14%
Apr '17	11%	29%	29%	22%	9%	-11%
Mar '16	13%	26%	30%	23%	9%	-14%
Apr '15	11%	25%	30%	23%	10%	-17%
Apr '12	13%	30%	27%	23%	8%	-7%
Mar '11	12%	19%	29%	34%	6%	-31%
Mar '10	9%	24%	34%	24%	10%	-25%
Mar '08	5%	20%	34%	32%	10%	-41%

■ Very often ■ Sometimes ■ Not very often ■ Never ■ Don't know

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Anger: 1-in-3 (33%) Canadians report feeling angry often when thinking about the budget; highest regionally in Alberta (42%)

Q When you think about the new federal budget, how often have you felt **angry**?
[asked of all respondents, n=2,000]

Often (33%)

Not often (56%)

- Very often: 10%
- Sometimes: 22%
- Not very often: 25%
- Never: 31%
- Don't know: 11%

Segmentation
Respondents who say "often"

Region
- BC: 29%
- Alberta: 42%
- Prairies: 35%
- Ontario: 32%
- Quebec: 31%
- Atlantic Canada: 26%

Value Cluster
- Populist Conservatives: 54%
- Deferential Conservatives: 46%
- Business Liberals: 25%
- Left Liberals: 28%
- Core Left: 21%
- Thrifty Moderates: 36%

Party ID
- Liberal: 22%
- Conservative: 52%
- NDP: 25%
- Other: 41%
- Unaligned: 28%

Anger: Those saying they feel angry often when thinking about the budget is down 7 points compared to 2019 to lowest point since 2016

Q When you think about the new federal budget, how often have you felt **angry**?
[asked of all respondents, n=2,000]

Net often

	Very often	Sometimes	Not very often	Never	Don't know	Net often
Apr '21	10%	22%	25%	31%	11%	-24%
Mar '19	15%	24%	19%	30%	12%	-9%
Apr '18	16%	24%	22%	28%	10%	-10%
Apr '17	15%	25%	24%	28%	9%	-11%
Mar '16	16%	18%	20%	35%	10%	-21%
Apr '15	16%	26%	23%	25%	9%	-6%
Apr '12	19%	27%	23%	25%	6%	-2%
Mar '11	15%	22%	19%	35%	9%	-17%
Mar '10	13%	25%	26%	27%	10%	-16%
Mar '08	8%	23%	25%	35%	9%	-29%

■ Very often   ■ Sometimes   ■ Not very often   ■ Never   ■ Don't know

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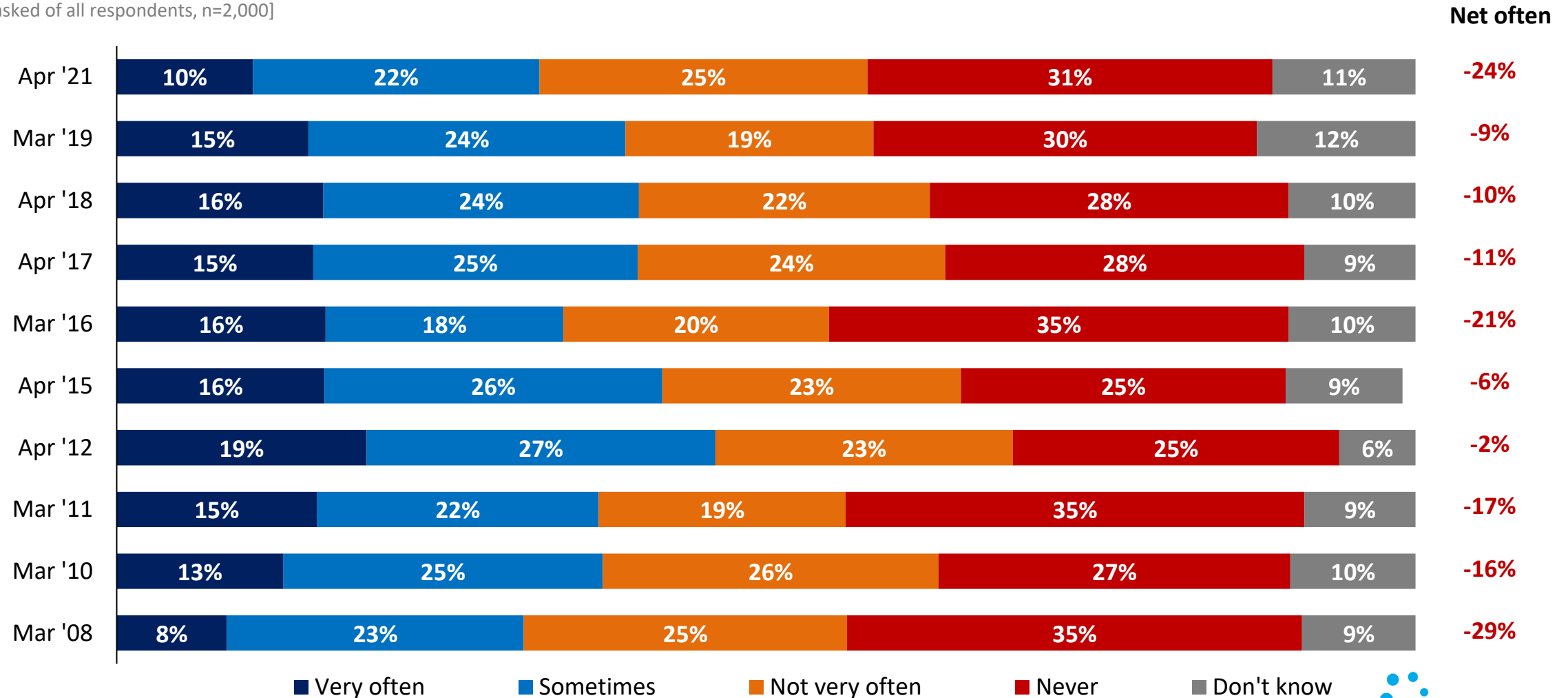
Leadership

Singh has pulled into the lead in net favourability but Trudeau continues to be the clear top choice for Prime Minister.

Leader Favourables: Net favourability is highest for Singh (+12%) and lowest for O'Toole (-19%)

Q 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=2000]

Net Favourable

	Very favourable	Somewhat favourable	Neutral/Neither	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't know	Net Favourable
Jagmeet Singh	13%	26%	24%	13%	14%	5%	5%	+12%
Justin Trudeau	17%	27%	14%	16%	24%		1%	+4%
Yves-Francois Blanchet	11%	15%	24%	14%	13%	17%	6%	-1%
Erin O'Toole	5%	15%	23%	17%	21%	12%	8%	-19%

- ■ Very favourable
- ■ Somewhat favourable
- ■ Neutral/Neither favourable nor unfavourable
- ■ Somewhat unfavourable
- ■ Very unfavourable
- ■ Do not recognize
- ■ Don't know

Current data: April 2021

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Party Leader NET Favourables Tracking: O'Toole continues to trail with the lowest net favourability

Q 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=2000]

Stephen Harper — Andrew Scheer — Erin O'Toole
Thomas Mulcair — Jagmeet Singh
Gilles Duceppe — Martine Ouellet — Mario Beaulieu — Yves-Francois Blanchet

+12%
+11%

+12%
+4%
-1%

-20%
-23%

-19%

Apr-15, May-15, Jul-15, Aug-15, Sep-15, Sep-15 (2), Oct-15, Oct-15 (2), Oct-15 (3), May-17, Oct-17, Mar-18, Sep-18, Mar-19, Apr-19, Sep-19, Sep-19 (2), Oct-19, Oct-19 (2), May-20, Jun-20, Jul-20, Sep-20, Feb-21, Mar-21, Apr-21

— Liberal Leader — Conservative leader — NDP Leader — Bloc Leader
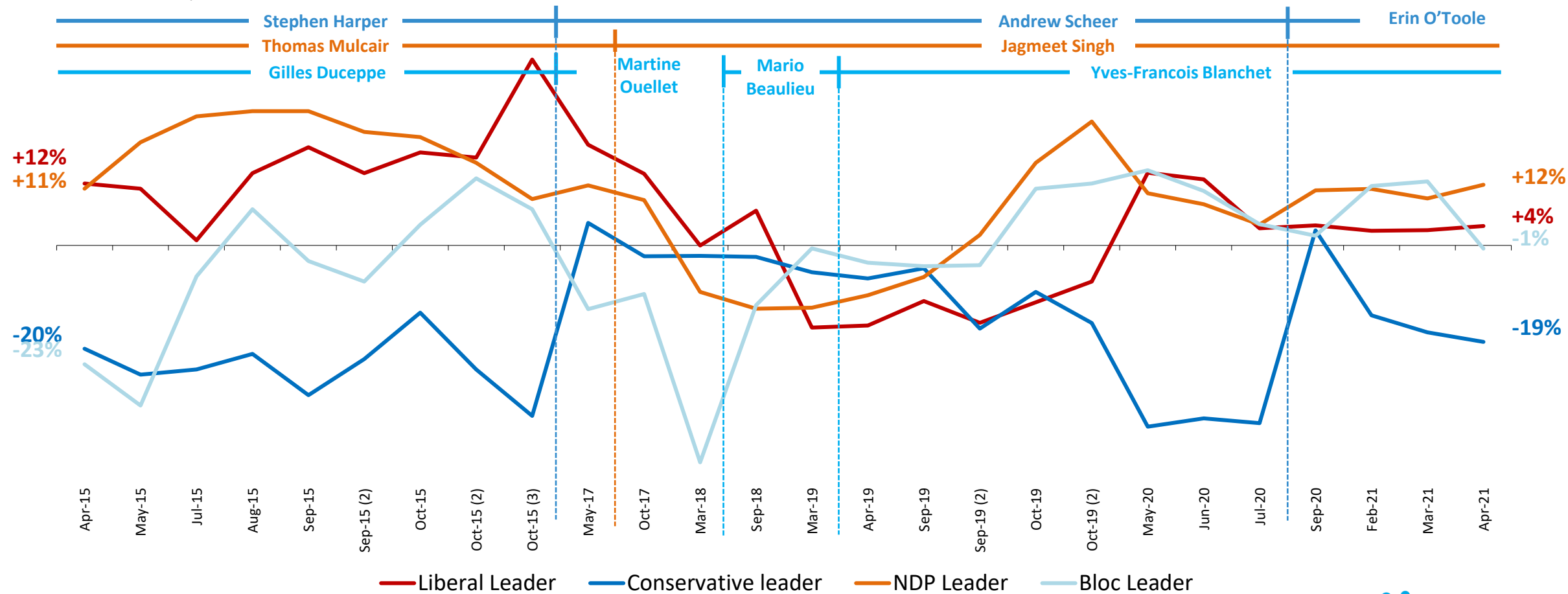
Note: Green Leader, People's Party Leader not shown.
Current data: April 2021
Note: Results for Yves-Francois Blanchet for Quebec respondents only

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Best Prime Minister Tracking: Trudeau continues to be the clear top choice for Prime Minister, Singh edges out O'Toole

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents; n=2000]

2015 Election

2019 Election

Legend: Liberal Leader — Conservative Leader — NDP Leader — Bloc Leader — Green Leader — People's Party Leader

Values marked on chart: 37%, 31%, 23%, 7%, 2% (left side); 44%, 23%, 20%, 6%, 4%, 2% (right side)

X-axis: Jul-15, Aug-15, Sep-15, Sep-15 (2), Oct-15, Oct-15 (2), Oct-15 (3), May-17, Oct-17, Mar-18, Sep-18, Mar-19, Apr-19, Sep-19, Sep-19 (2), Oct-19, Oct-19 (2), May-20, Jun-20, Jul-20, Aug-20, Sep-20, Feb-21, Mar-21, Apr-21

Current data: April 2021

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Vote is mostly steady this month.

Innovative reports on vote intention in two ways.

When we ask people who they would vote for if an election were held today, and who they lean towards if they are unsure, we call those results **Combined vote.** This accounts for the views of everyone in the population including decided voters, undecided voters, and non-voters.

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.

Federal Combined Vote: The Liberals (34%) lead over the Conservatives (23%) when it comes to the federal vote

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**
[asked of all respondents; n=2,000]

Conservative	Liberal	NDP	Bloc	Green	Peoples Party	Other	Undecided DK	Would not vote None
23%	34%	16%	4%	6%	3%	1%	11%	3%

Current data: April 2021
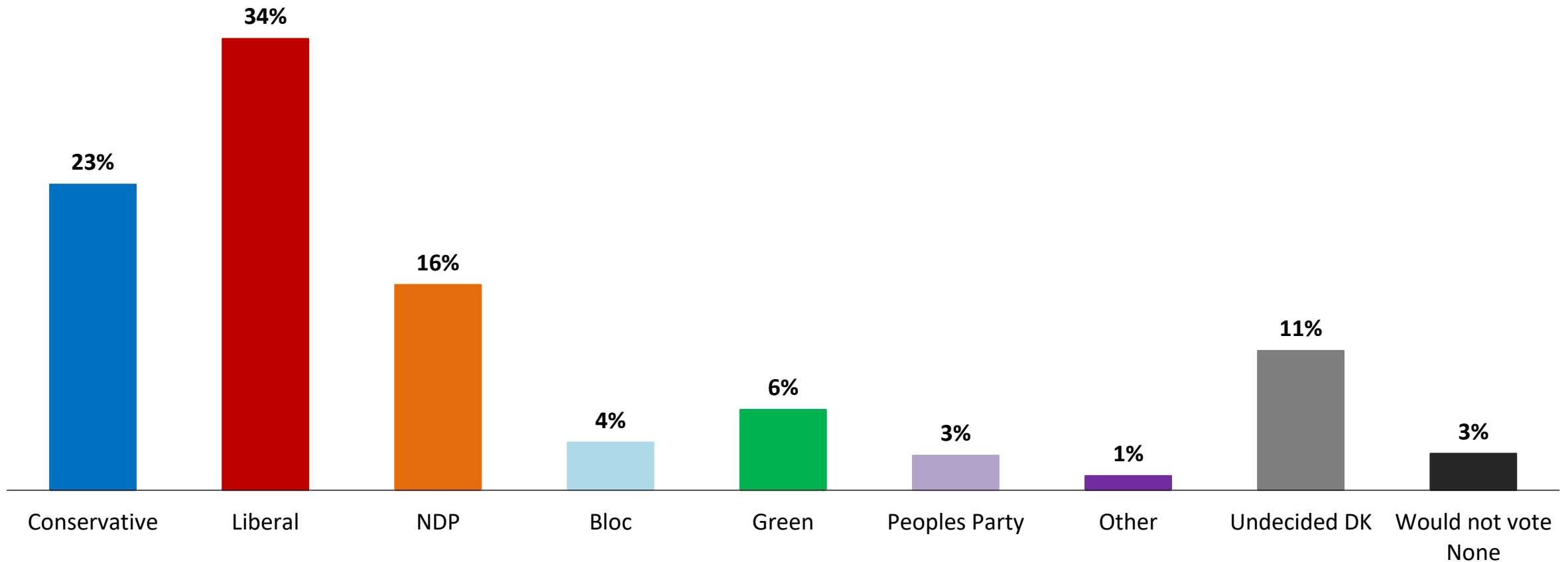
Federal Vote Tracking: The Liberals continue their lead over the Conservatives while the NDP is up directionally this wave

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**
[asked of all respondents; n=2,000]

Conservative **Liberal** **NDP** **Bloc** **Green** **Other** **Undecided DK** **Would not vote/None**

Current data: April 2021

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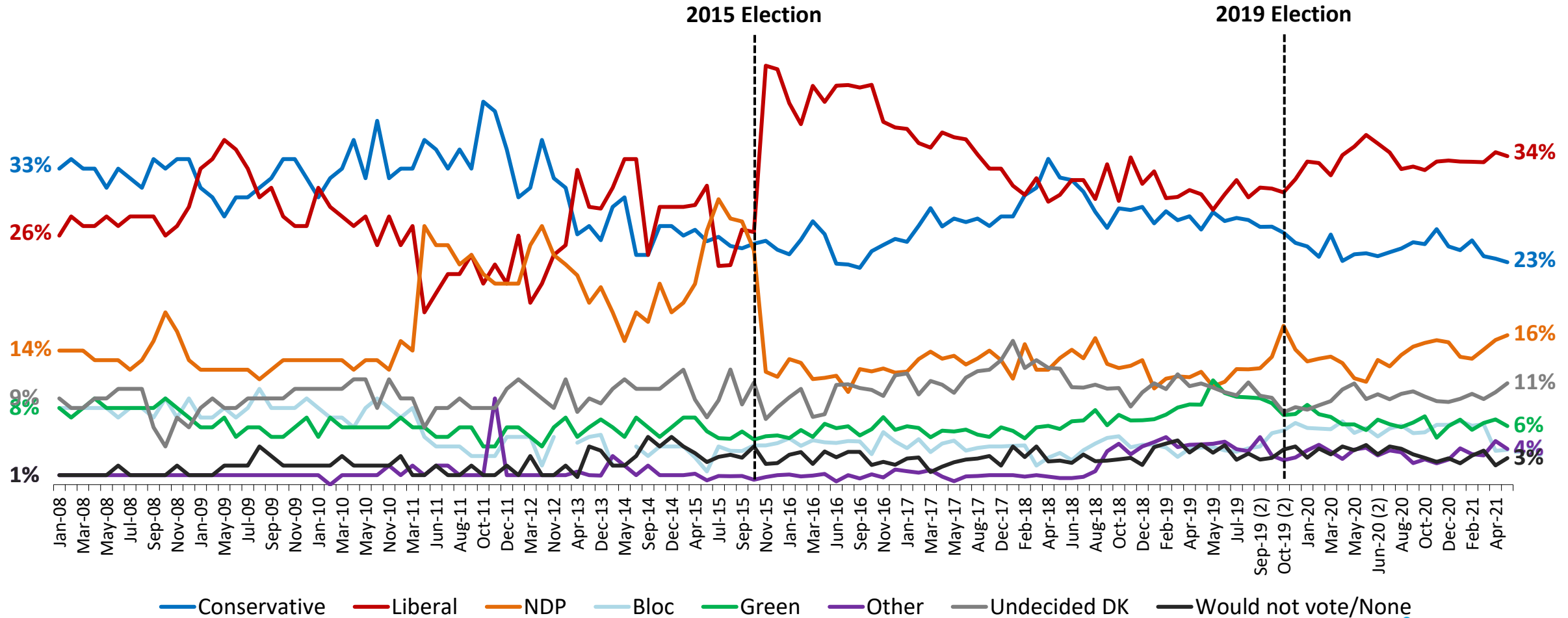
Federal Decided Vote: Among decided voters, the Liberals (40%) hold a 13 point lead over the Conservatives (27%)

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[decided voters only; n=1,732]

Current data: April 2021
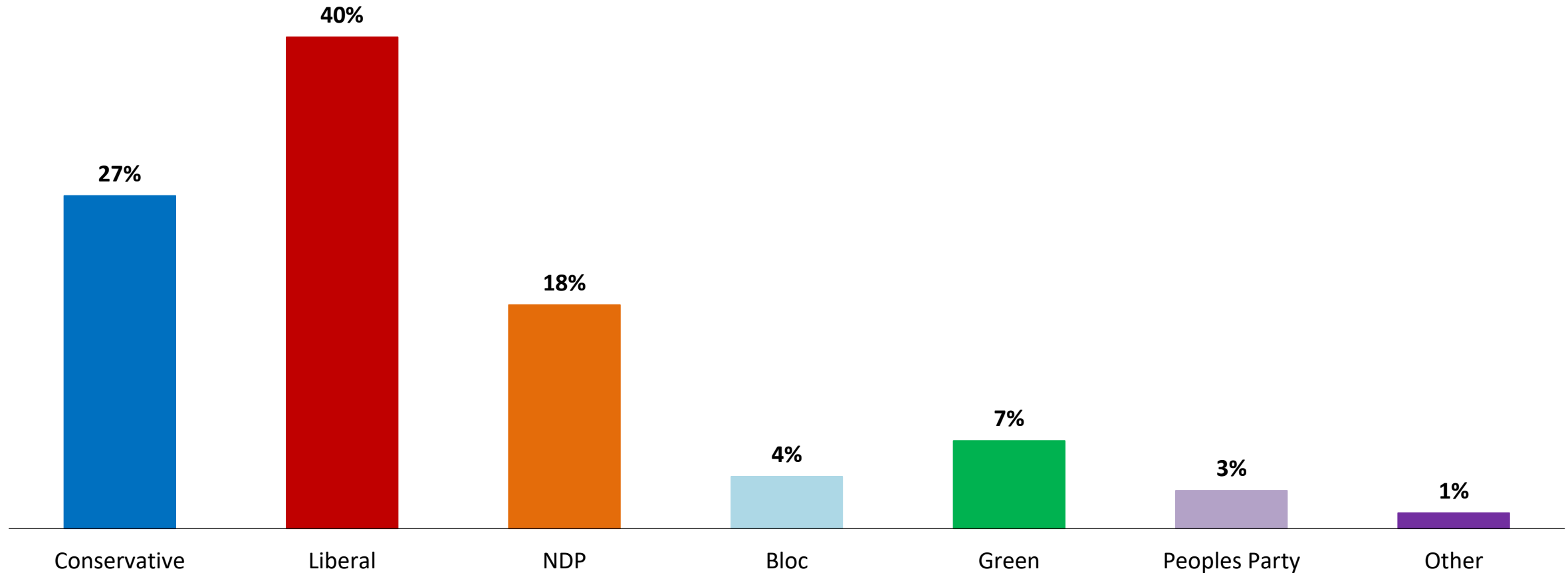
Federal Decided Vote Tracking: While the Liberals maintain their lead, the NDP is up to its highest vote share since October 2019

Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=1,732]

2015 Election

2019 Election

37%   40%

29%   27%

16%   18%

9%   7%

    4%

1%

—— Conservative —— Liberal —— NDP —— Bloc —— Green —— Other

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Current data: April 2021
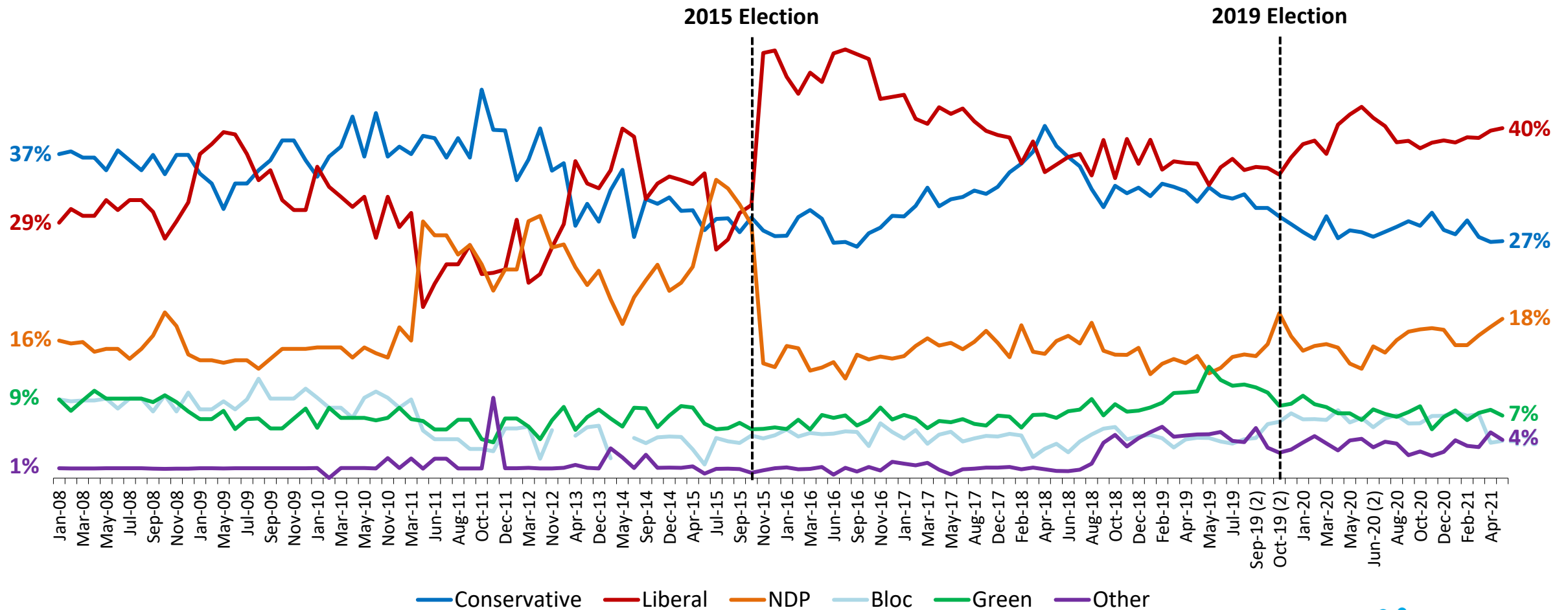
Decided Vote by Region: The Liberals now hold significant leads in all three of Canada's biggest provinces

Decided vote by REGION

Decided Vote	REGION					
	BC	**AB**	**Prairies**	**ON**	**QC**	**Atlantic**
	(N=243)	(N=201)	(N=109)	(N=687)	(N=385)	(N=108)
Conservative	19%	42%	37%	30%	18%	17%
Liberal	37%	25%	34%	43%	42%	49%
NDP	28%	22%	23%	15%	13%	19%
Bloc	-	-	-	-	19%	-
Green	12%	4%	2%	7%	5%	13%
Other	4%	5%	4%	5%	4%	3%

Note: Current data: April 2021

Decided Vote by Value Cluster: The Liberals and Conservatives are neck-and-neck among Deferential Conservatives

Value Clusters

Federal Decided Vote	Populist Conservatives (N=202)	Deferential Conservatives (N=214)	Business Liberals (N=460)	Left Liberals (N=265)	Core Left (N=310)	Thrifty Moderates (N=281)
Conservative	55%	39%	26%	18%	10%	26%
Liberal	22%	37%	49%	40%	43%	34%
NDP	6%	9%	14%	27%	30%	18%
Bloc	2%	6%	4%	3%	3%	7%
Green	3%	3%	5%	7%	11%	11%
Other	11%	5%	2%	5%	3%	4%

Note: Current data: April 2021

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Combined Vote by Value Cluster: The Liberals now statistically tied with Conservatives among Deferential Conservatives

Populist Conservatives
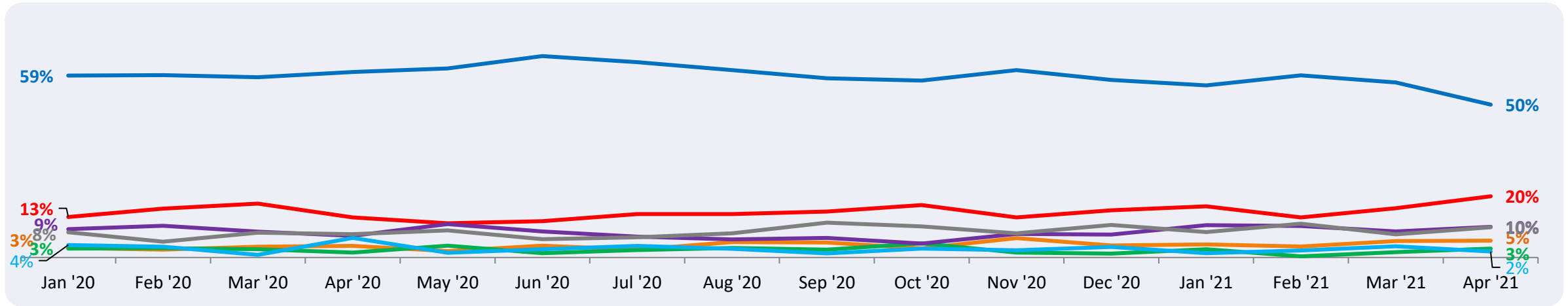
Deferential Conservatives
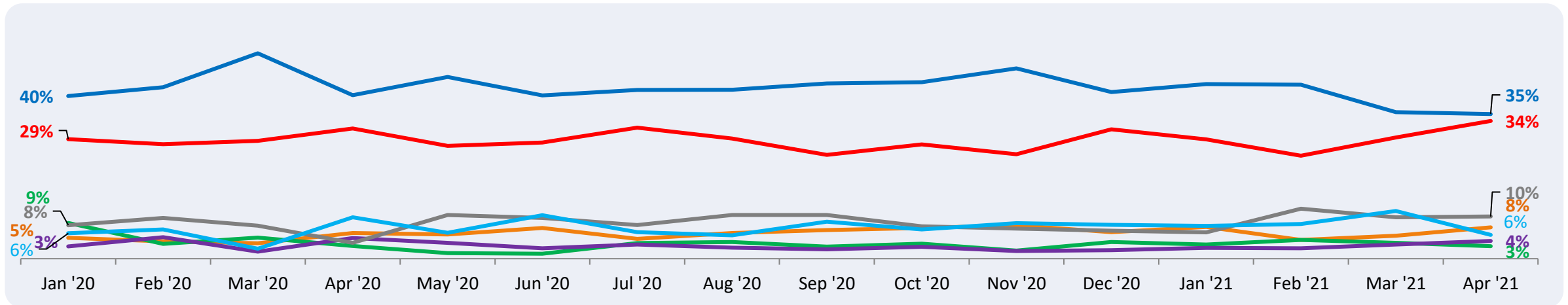
Combined vote:	Liberal	Conservative	NDP	Bloc	Green	Other	Undecided/ Would not Vote

Note: Current data: April 2021

Combined Vote by Value Cluster: Liberals lead among both business liberals and left liberals

Business Liberals
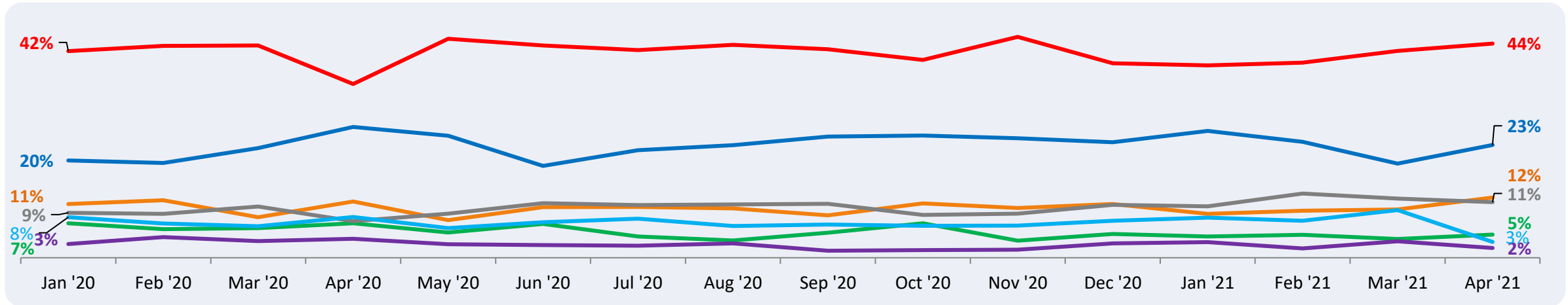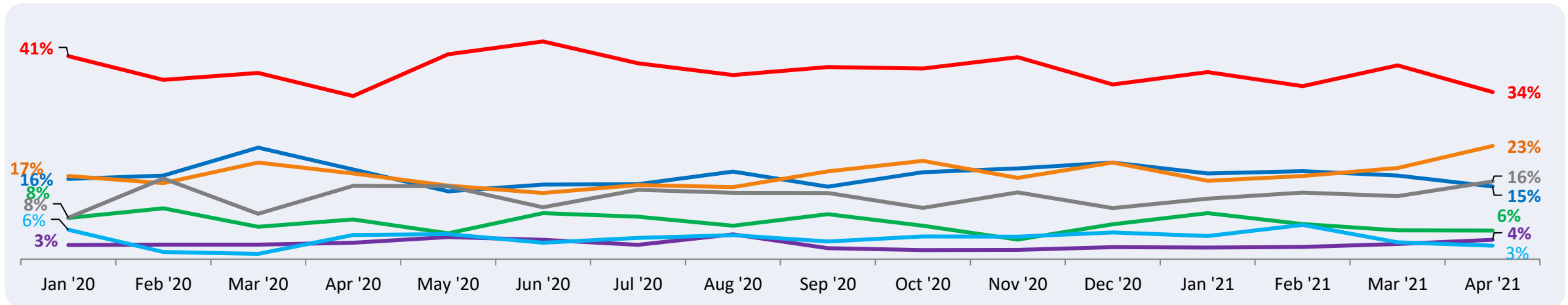
Left Liberals

Combined vote: Liberal   Conservative   NDP   Bloc   Green   Other   Undecided/ Would not Vote

Note: Current data: April 2021

Combined Vote by Value Cluster: The Liberals lead the NDP by 12 points among the core left

Core Left
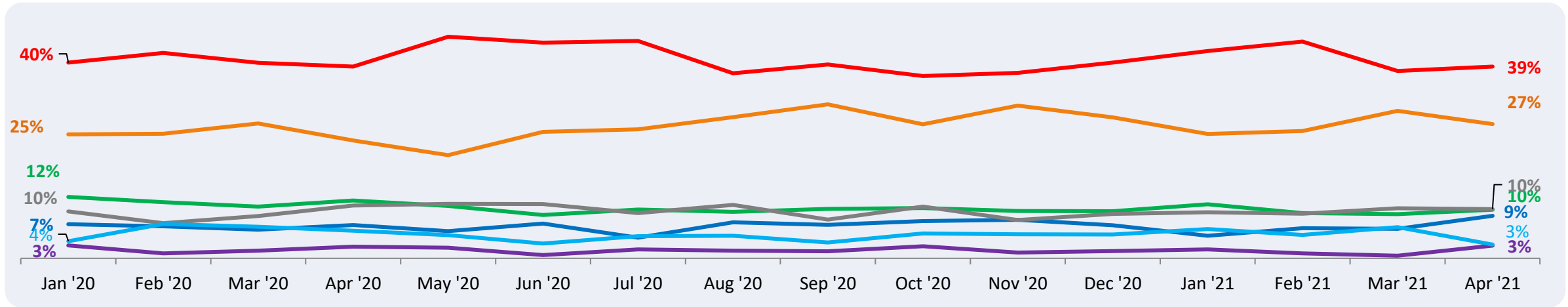
Thrifty Moderates
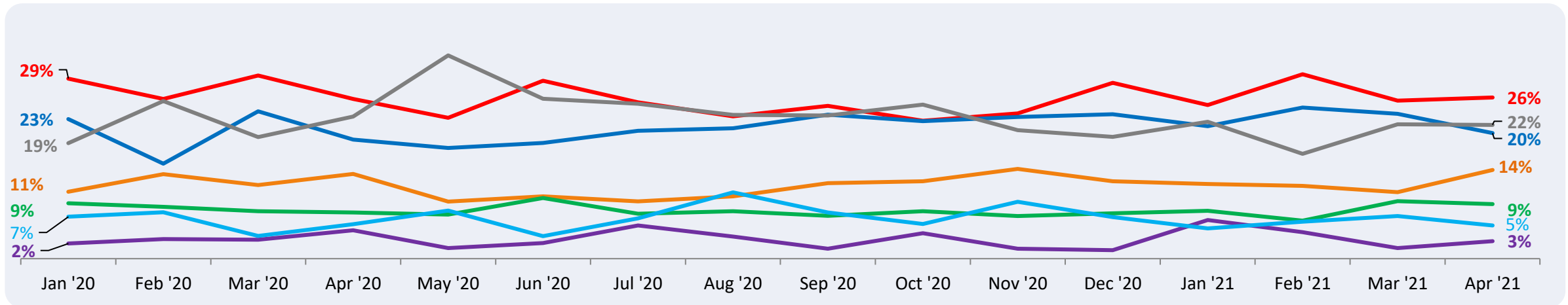
Combined vote: **Liberal** **Conservative** **NDP** **Bloc** **Green** **Other** Undecided/ Would not Vote

Note: Current data: April 2021

Decided Vote by Economic Gap: The Liberals lead over the Conservatives in all four economic gap segments

Economic Gap

Federal Decided Vote	Achievers (N=540)	Strugglers (N=496)	Ambivalent (N=313)	Alienated (N=383)
Conservative	33%	27%	24%	20%
Liberal	42%	36%	42%	40%
NDP	12%	17%	19%	26%
Bloc	4%	7%	2%	1%
Green	5%	7%	8%	8%
Other	3%	5%	5%	5%

Note: Current data: April 2021

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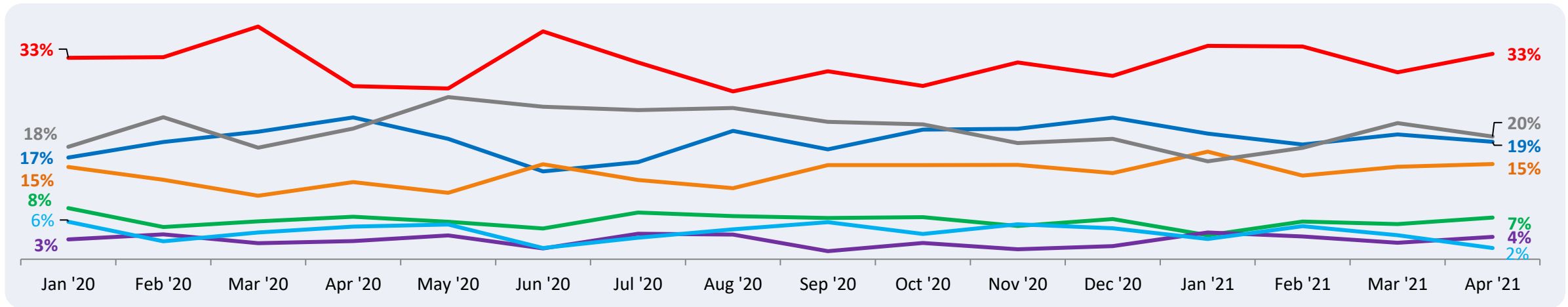Combined Vote by Economic Gap: The Liberals lead the Conservatives among both Dream Achievers and Strugglers
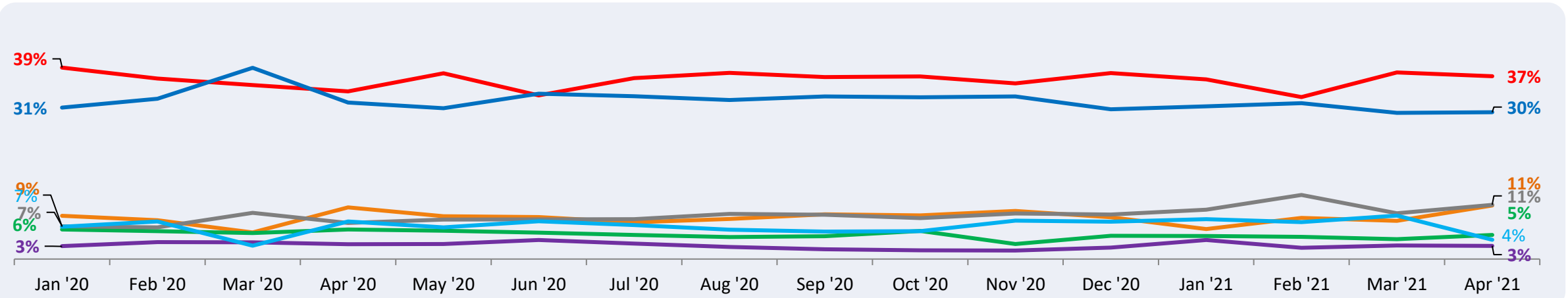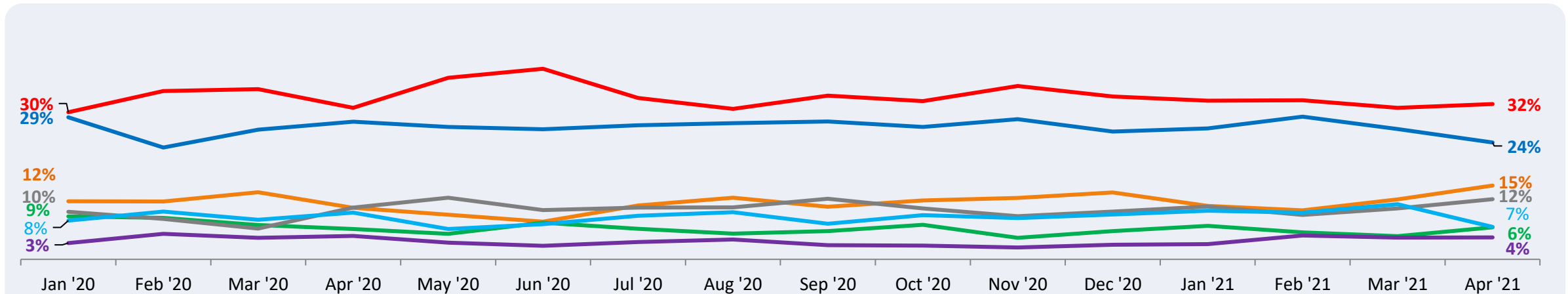
Combined Vote by Economic Gap: The Liberals have consistently been in the lead among ambivalent and alienated voters
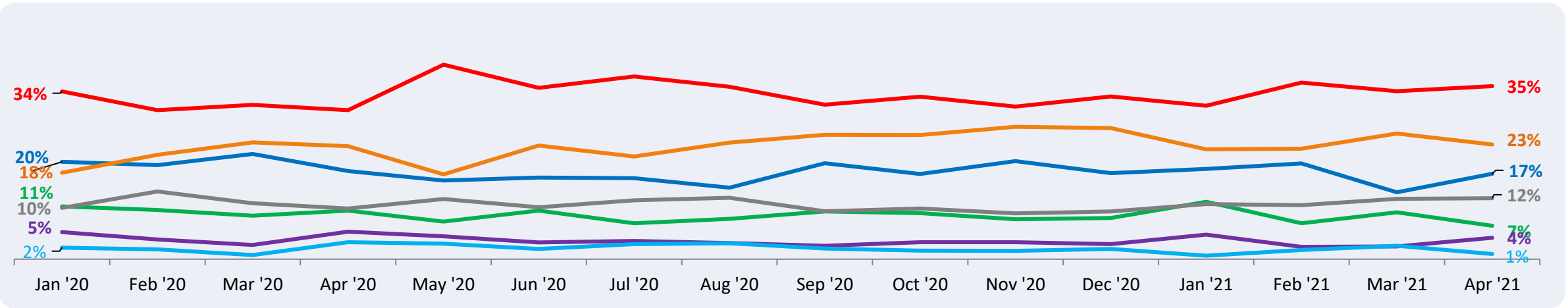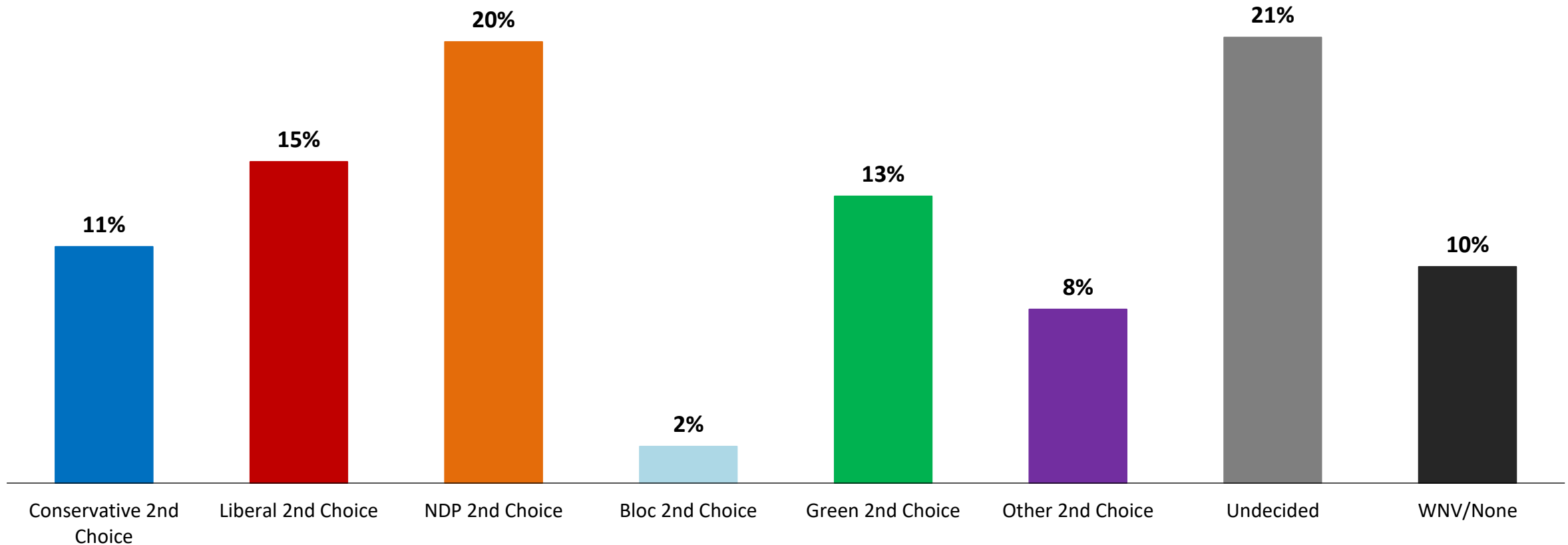

Note: Current data: April 2021

Federal 2nd Choice: A plurality of decided voters either choose the NDP (20%) as their second choice or are undecided (21%)

Q And which party would be your second choice?
[only decided voters; n=1,732]

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Federal 2nd Choice: The top 2nd choice of Liberal voters is the NDP and vice versa

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

	First Choice				
Second Choice	Conservative 1st Choice (N=464)	Liberal 1st Choice (N=686)	NDP 1st Choice (N=312)	Bloc 1st Choice (N=73)	Green 1st Choice (N=122)
Conservative 2nd Choice		16%	12%	12%	12%
Liberal 2nd Choice	18%		40%	18%	27%
NDP 2nd Choice	13%	36%		10%	24%
Bloc 2nd Choice	2%	1%	1%		2%
Green 2nd Choice	8%	14%	24%	19%	0%
Other 2nd Choice	15%	4%	3%	6%	12%
Undecided	22%	22%	17%	19%	19%
WNV/None	22%	6%	3%	15%	4%

Note: 'Other' in Combined Vote not shown due to insufficient sample size.
Current data: April 2021

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Combined Vote by Party ID: Liberal, CPC, and NDP partisans are about equally loyal with over 80% of their vote going towards their own party

Federal Party Identification

Federal Combined Vote	Conservative (N=423)	Liberal (N=610)	NDP (N=256)	Other (N=230)	Unaligned (N=214)
Conservative	85%	5%	2%	10%	24%
Liberal	7%	86%	12%	10%	35%
NDP	3%	6%	81%	8%	17%
Bloc	1%	1%	1%	25%	2%
Green	1%	2%	2%	34%	10%
Other	3%	1%	1%	12%	11%

Note: Current data: April 2021

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Methodology

Survey Methodology

These are the results of an online survey conducted between April 22nd and May 5th, 2021.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Dynata, 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=2,738 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: April 22nd to May 5th, 2021.

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.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	288	10.5%	270	13.5%
Men 35-54	347	12.7%	333	16.7%
Men 55+	573	21.0%	365	18.3%
Women 18-34	432	15.8%	275	13.8%
Women 35-54	444	16.3%	348	17.5%
Women 55+	647	23.7%	404	20.2%
BC	543	19.8%	272	13.6%
AB	540	19.7%	228	11.4%
Prairies	141	5.1%	132	6.6%
ON	900	32.9%	778	38.9%
QC	475	17.3%	455	22.8%
Atlantic	139	5.1%	135	6.7%

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