

Canada This Month

Federal Party Brands

Public Opinion Research
Release Date: December 15, 2023
Field Dates: November 2 to December 5, 2023

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Key Findings

1

Conservatives are up 16 points on Liberals among decided voters.

Among decided voters, 40% express their intention to vote Conservative, while 24% say Liberal.

2

Liberal brand promise is on the decline, while Conservative is on the rise.

Liberal brand promise has declined across all issues asked, reaching net negative sentiments on gun violence and housing. Conservatives have emerged as the preferred party on addressing pocketbook issues, gun violence, and housing.

3

Pierre Poilievre leads in all positive leader attributes.

While Trudeau is most likely to be seen as dishonest, Poilievre leads in all positive attributes, including strong leadership and competence.

4

Liberals have lost ground in nearly all riding clusters, while Conservatives see gains.

Conservatives closed the gap in the LPC Strong cluster, a group of strongest Liberal seats across the last three elections.

5

Conservatives are on track to secure a substantial majority with a median seat count of 217.

Liberals, with a median seat count of 59, fail to approach a majority threshold even in the best-case scenario.

Methodology

Survey Methodology



These are the results of an online survey conducted between November 2nd and December 5th, 2023.

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 samples. 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=5,534 Canadian citizens, 18 years or older. The results are nationally weighted to n=2,500 based on Census data from Statistics Canada.

Field Dates: November 2nd and December 5th, 2023.

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote 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	504	9.1%	342	13.7%
Men 35-54	764	13.8%	397	15.9%
Men 55+	1,306	23.7%	476	19.1%
Women 18-34	718	13%	330	13.2%
Women 35-54	905	16.4%	412	16.5%
Women 55+	1,322	24%	535	21.5%
BC	904	16.3%	350	14%
AB	611	11%	279	11.1%
Prairies	332	6%	159	6.4%
ON	2,234	40.4%	972	38.9%
QC	1,056	19.1%	573	22.9%
Atlantic	397	7.2%	167	6.7%

Winds of Public Debate

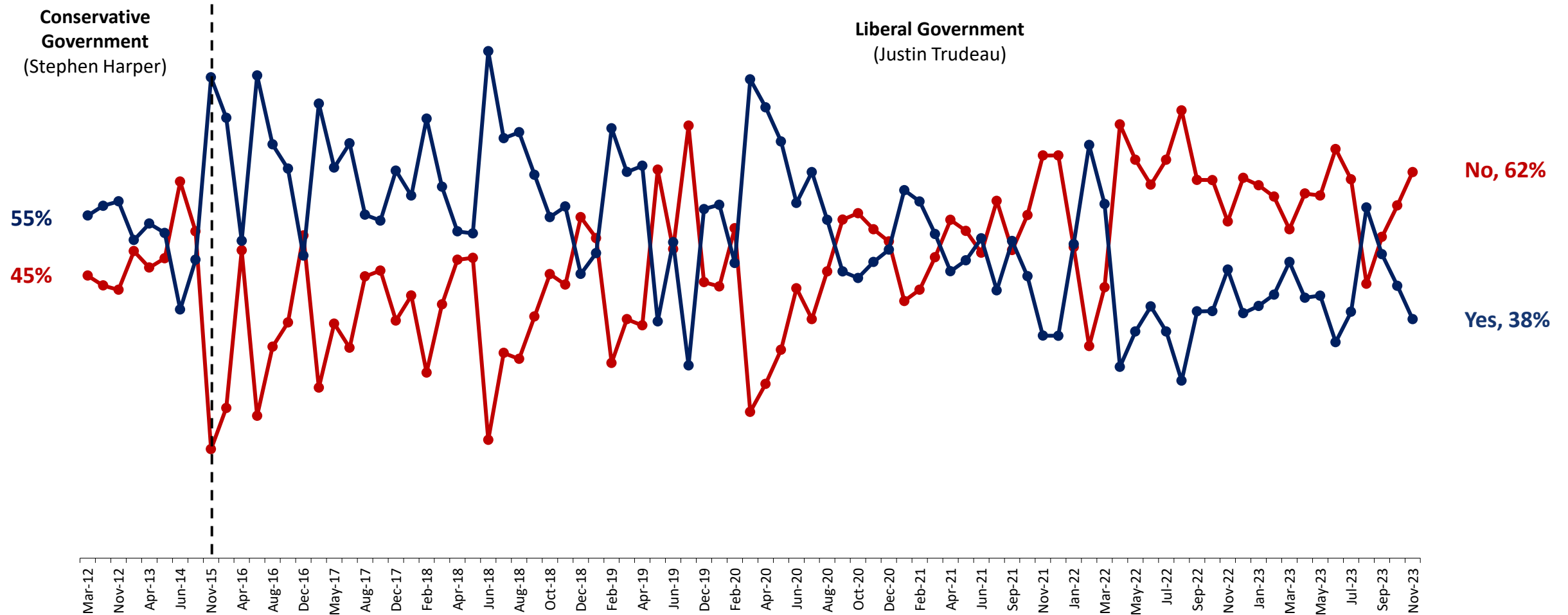
Federal Read, Seen, Heard (Tracking):

The gap between 'No' and 'Yes' has increased for the third straight 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=2,500]



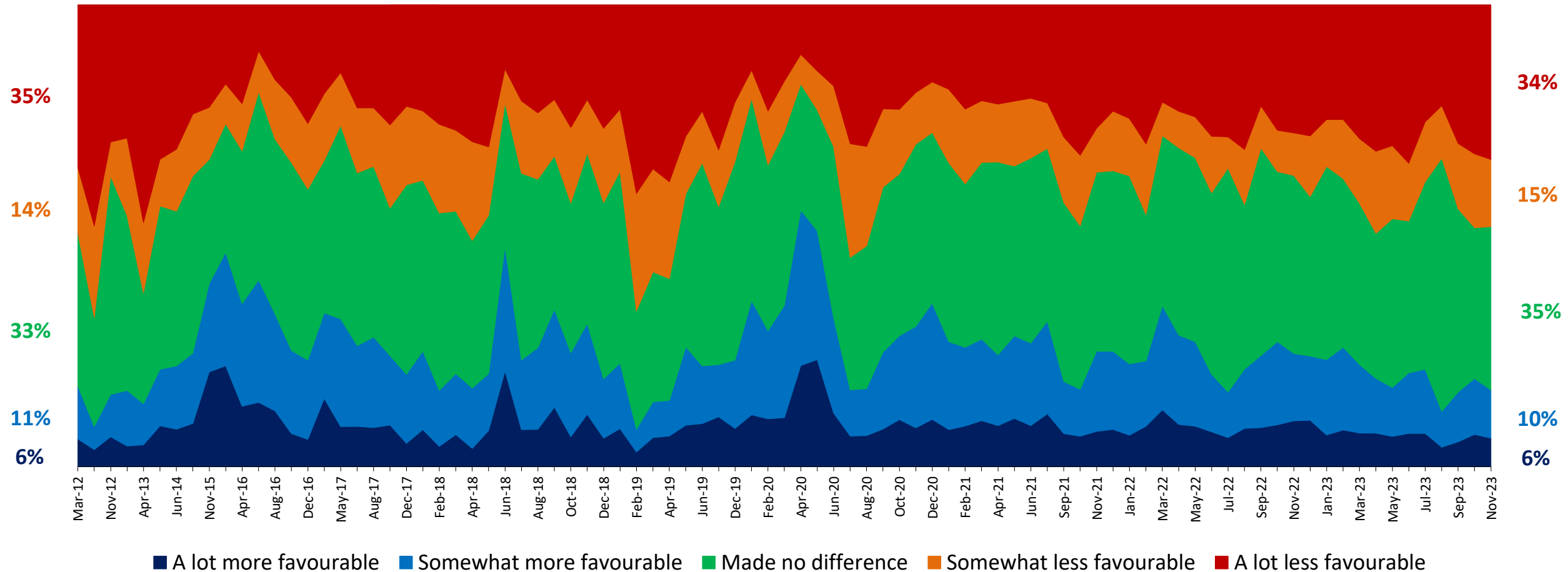
Federal Read, Seen, Heard Impact (Tracking):

Less favourable impression up 15 points since August



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 read, seen or heard, n=956]



Federal Read, Seen, Heard (Open-Ended):

Israel-Hamas war-related comments lead this month's RSH, but carbon tax carve-out has worse impact

Q

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 read, seen or heard, n=956]

		More favourable	No difference	Less favourable	Net favourable
Israel-Hamas war (Support for Israel, calling for peace, etc.)	20%	21%	43%	36%	-15%
Carbon tax carve-out on heating oil	15%	9%	26%	65%	-56%
General negative opinions	8%	4%	22%	74%	-70%
Trudeau's declining poll ratings/dropping popularity	6%	11%	29%	60%	-48%
Fall economic statement/budget	4%	11%	40%	49%	-38%
Protesters confronting Trudeau in Vancouver	3.5%	3%	45%	52%	-49%
Diplomatic conflict with India	3.1%				
Housing crisis/Affordable housing	2.8%				
Spending taxpayers' money	2.2%				
Trudeau's comments denouncing racism/hate crimes	2.2%				
Trudeau attending the APEC summit in San Francisco	2.1%				
Car explosion at the Rainbow bridge	2.1%				
Trudeau's separation from his wife	1.7%				
General positive opinions	1.5%				
Trudeau's preoccupation with foreign travel/appearances	1.2%				
Immigration and border security	1%				
Other	21%				
Don't know	3%				

Note: Only responses >1% are shown.

Government Approval

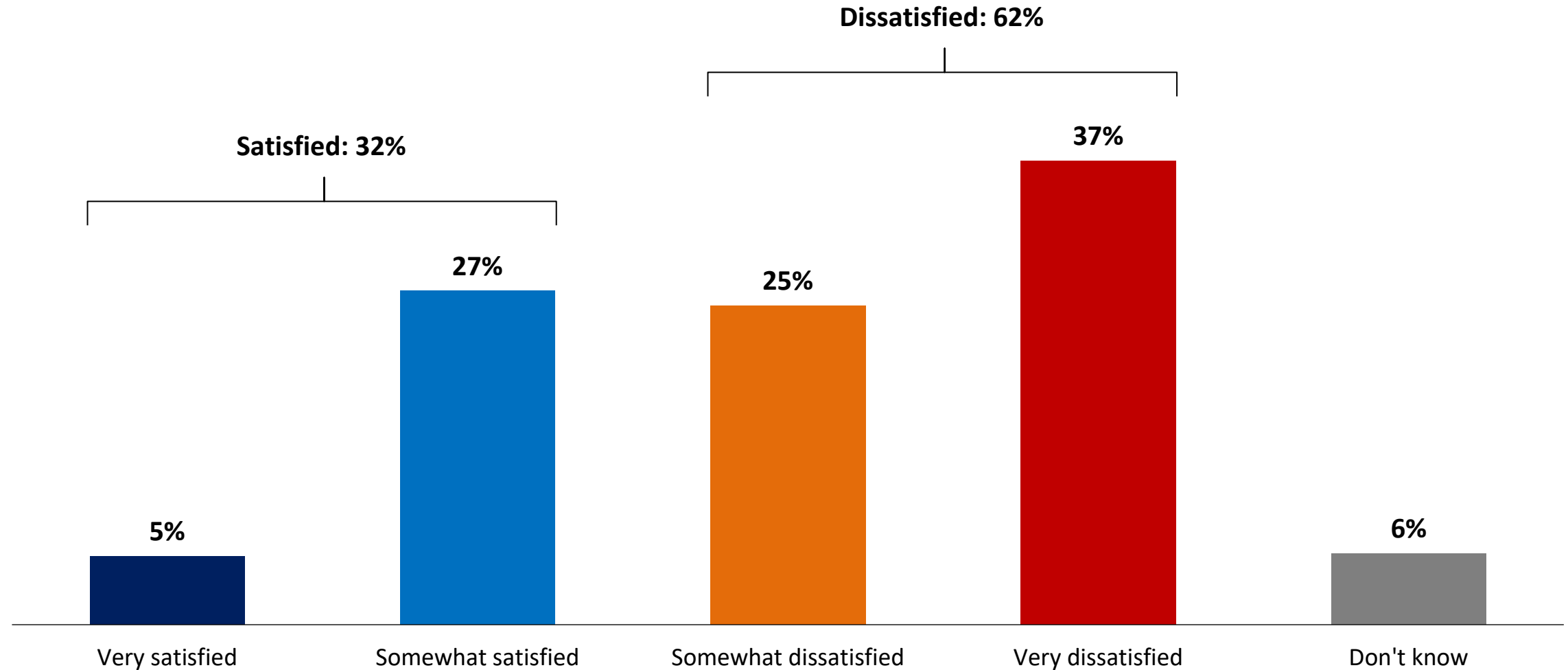
Federal Government Satisfaction:

62% are dissatisfied with the performance of the federal government

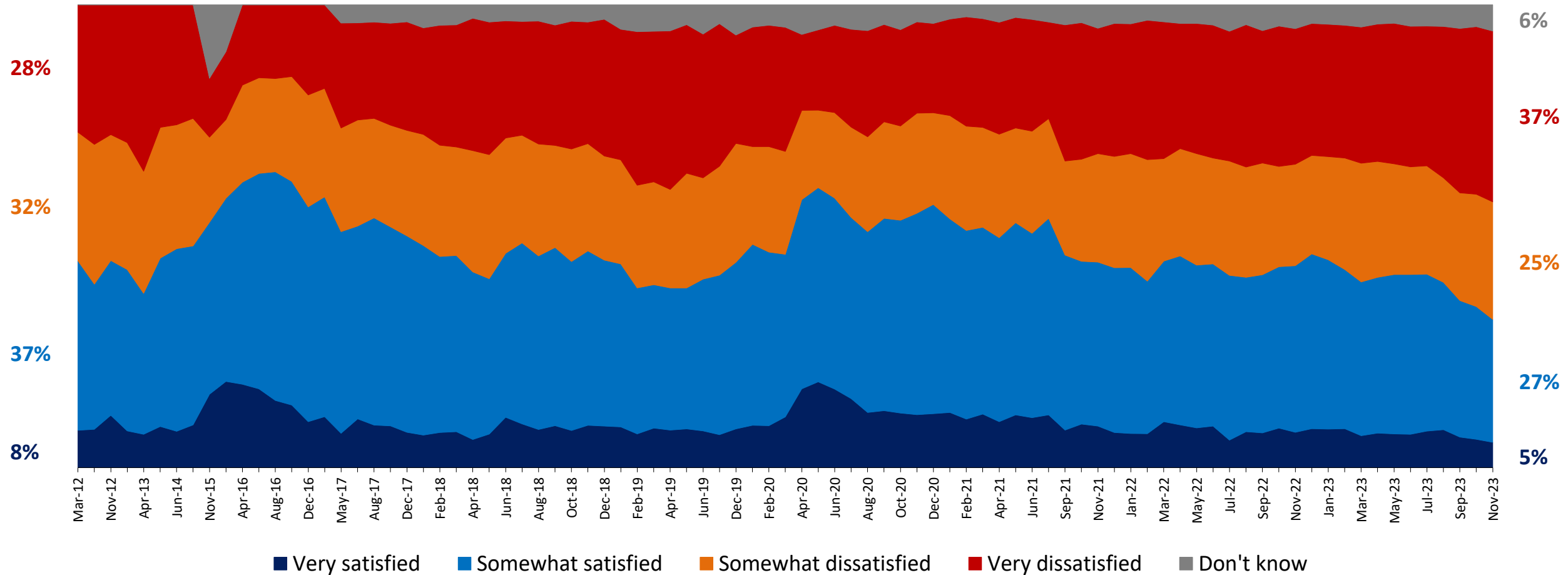


Generally speaking, how satisfied are you with the performance of the federal government in Canada? Would you say you are...

[asked of all respondents, n=2,500]



[asked of all respondents, n=2,500]



Vote

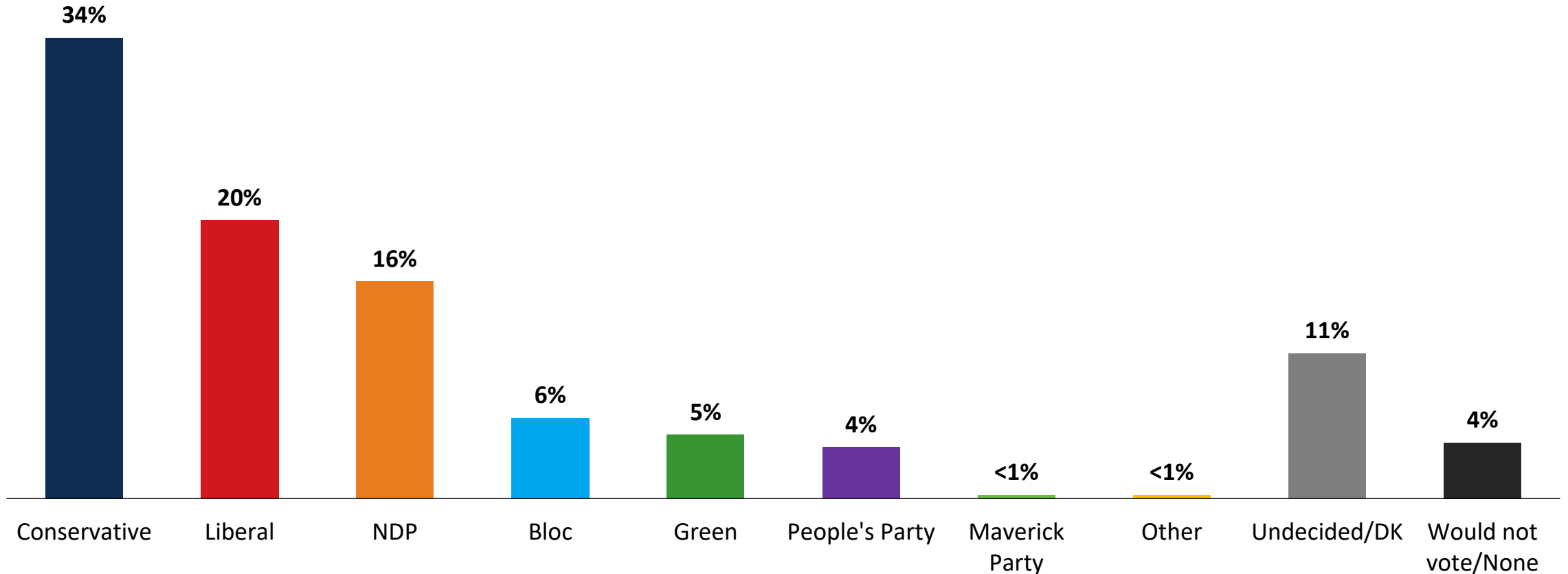
Federal Combined Vote:

Conservatives up 14 points over Liberals with 34%; NDP trailing with 16%



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=2,500]



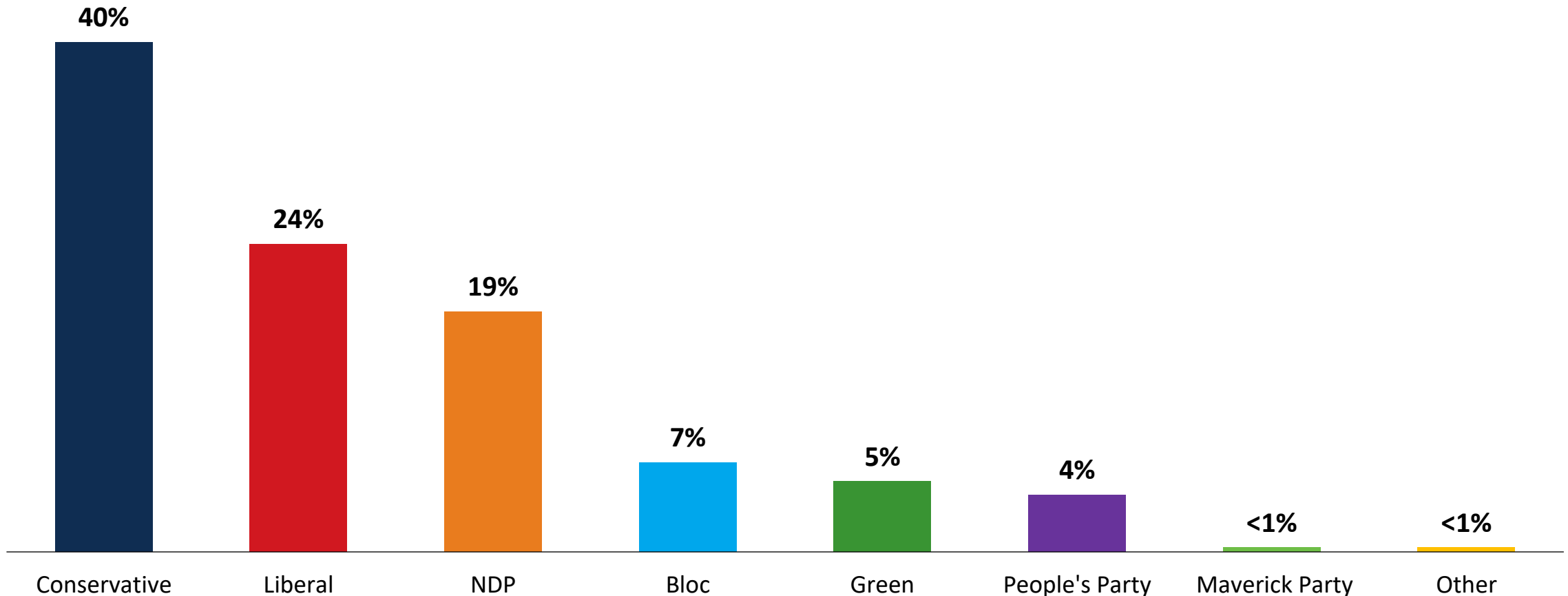
Federal Decided Vote:

Conservatives up 16 points on Liberals with 40%; NDP trailing with 19%



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

[asked of decided voters only, n=2,131]



Federal Decided Vote by Region:

Conservatives hold the lead in every province except Québec

		Region					
Decided Vote		British Columbia	Alberta	Prairies	Ontario	Québec	Atlantic
		n=304	n=244	n=139	n=832	n=476	n=136
	Conservative	42%	58%	51%	41%	24%	41%
	Liberal	20%	14%	16%	28%	25%	28%
	NDP	27%	20%	21%	20%	11%	18%
	Bloc	–	–	–	–	31%	–
	Green	8%	4%	5%	6%	4%	6%
	Other	3%	4%	7%	6%	5%	8%

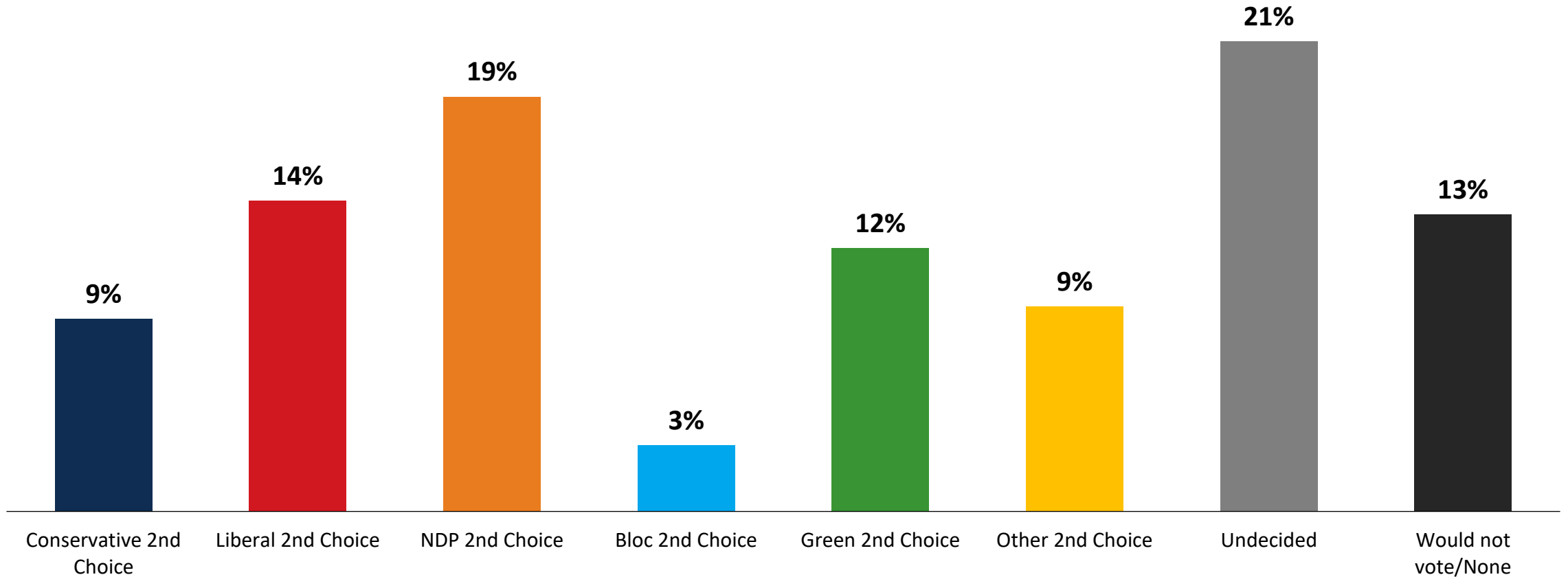
Federal Second Choice:

21% have not decided their 2nd choice; 19% say NDP



And which party would be your second choice?

[asked of decided voters only, n=2,131]



Federal Second Choice by Federal First Choice:

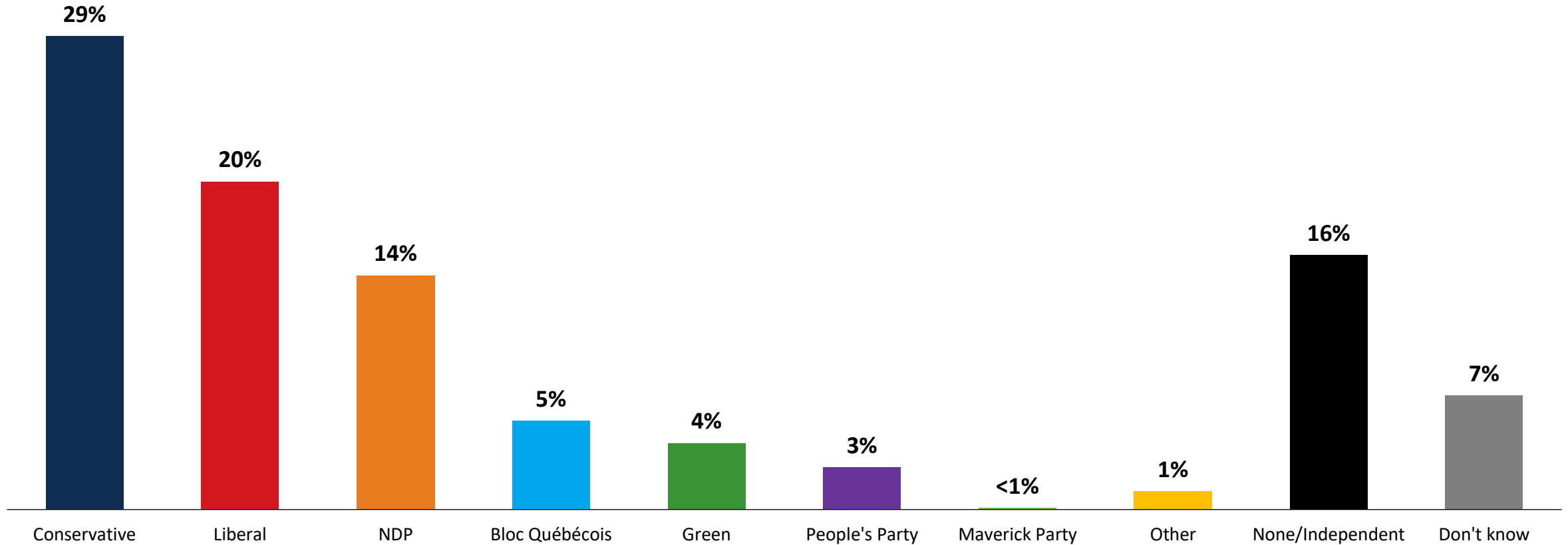
36% who have NDP as 1st choice have Liberal as 2nd choice; 41% of Liberals have NDP as a 2nd choice

		First Choice				
		Conservative 1st choice	Liberal 1 st choice	NDP 1 st choice	Bloc 1 st choice	Green 1 st choice
		n=847	n=511	n=399	n=148	n=117
Second Choice	Conservative 2 nd choice		15%	11%	14%	12%
	Liberal 2 nd choice	11%		36%	17%	21%
	NDP 2 nd choice	15%	41%		14%	20%
	Bloc 2 nd choice	3%	4%	3%		4%
	Green 2 nd choice	8%	12%	24%	10%	
	Other 2 nd choice	16%	4%	3%	6%	12%
	Undecided	27%	17%	15%	23%	26%
	WNV/None	21%	8%	8%	14%	5%

Federal Party ID:

29% identify as Conservatives, 20% as Liberals

Q Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[asked of all respondents, n=2,500]

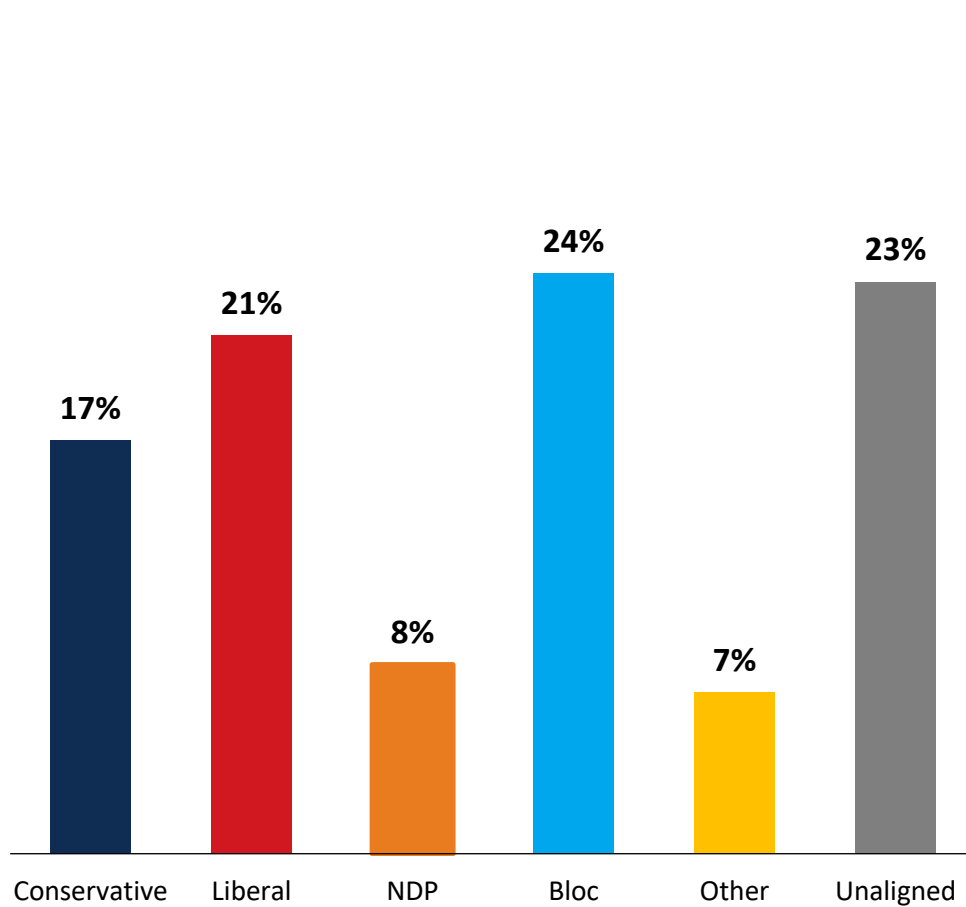


Federal Party ID (Québec vs Rest of Canada):

24% in Québec identify as Bloc; 17% identify as Conservative, as opposed to 33% in the rest of Canada

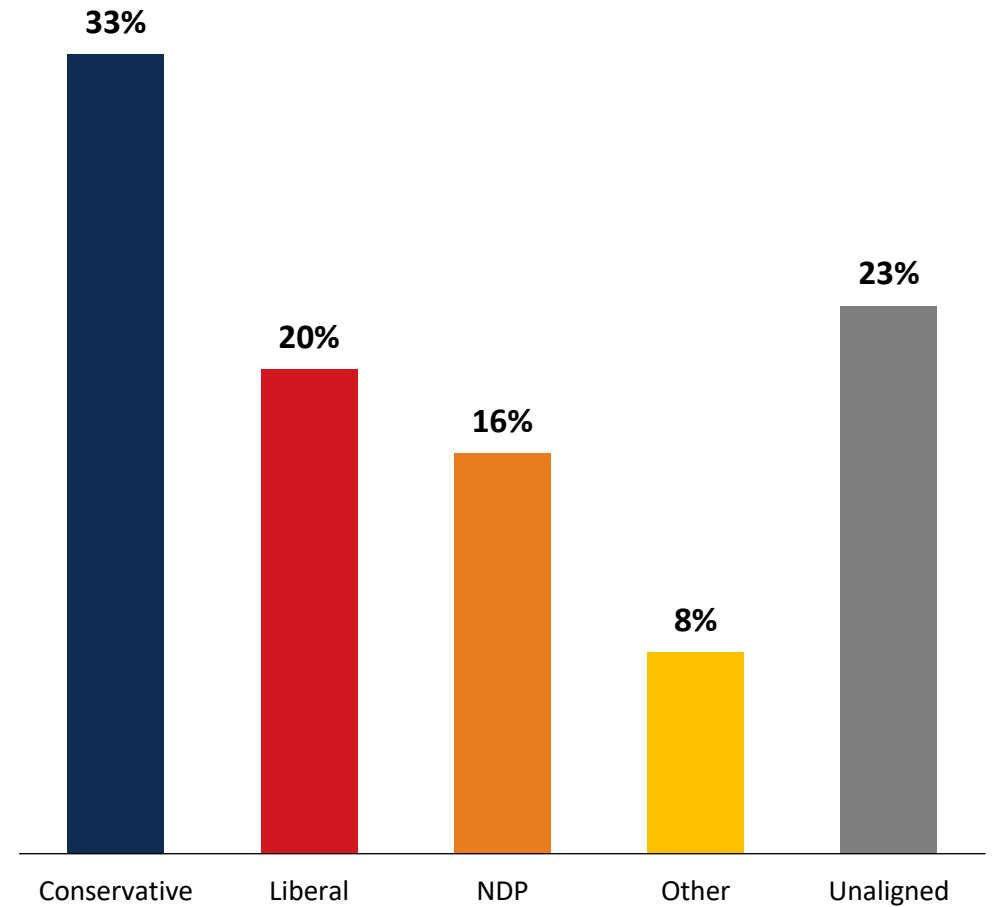
Party ID: Québec

[Respondents in Québec; n=573]



Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1,927]



Federal Decided Vote by Federal Party ID:

Conservatives more successful at rallying their base (90%) than Liberals (78%)

		Party ID				
Decided Vote		Conservative	Liberal	NDP	Other	Unaligned
		n=715	n=481	n=350	n=315	n=270
	Conservative	90%	10%	5%	10%	39%
	Liberal	4%	78%	9%	8%	20%
	NDP	2%	6%	81%	7%	18%
	Bloc	0%	1%	1%	40%	4%
	Green	1%	2%	2%	21%	9%
	Other	3%	3%	2%	14%	10%

Party Brands

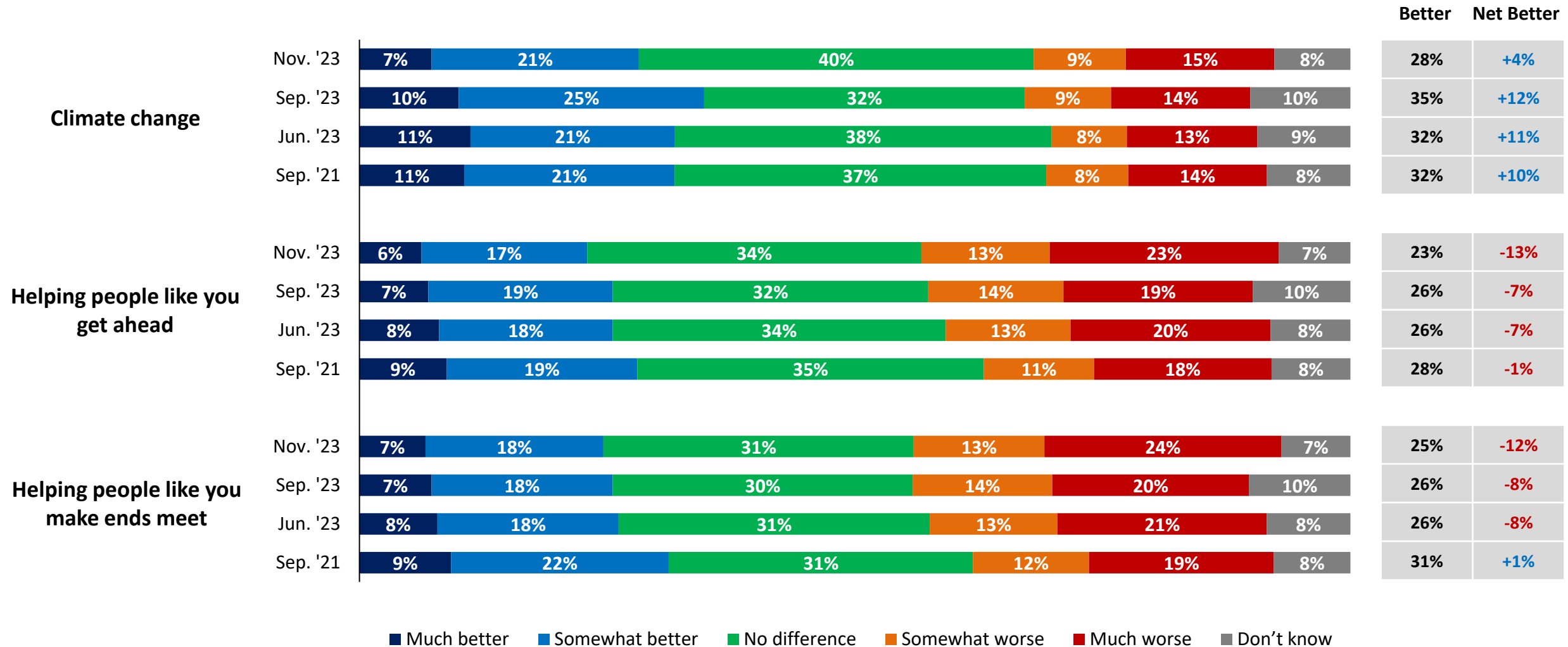
Liberal Brand Promise (Part 1):

Liberal brand promise is down on all three issues, but still net positive on climate change



If the Liberal Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?

[asked of all respondents, n=2,500]



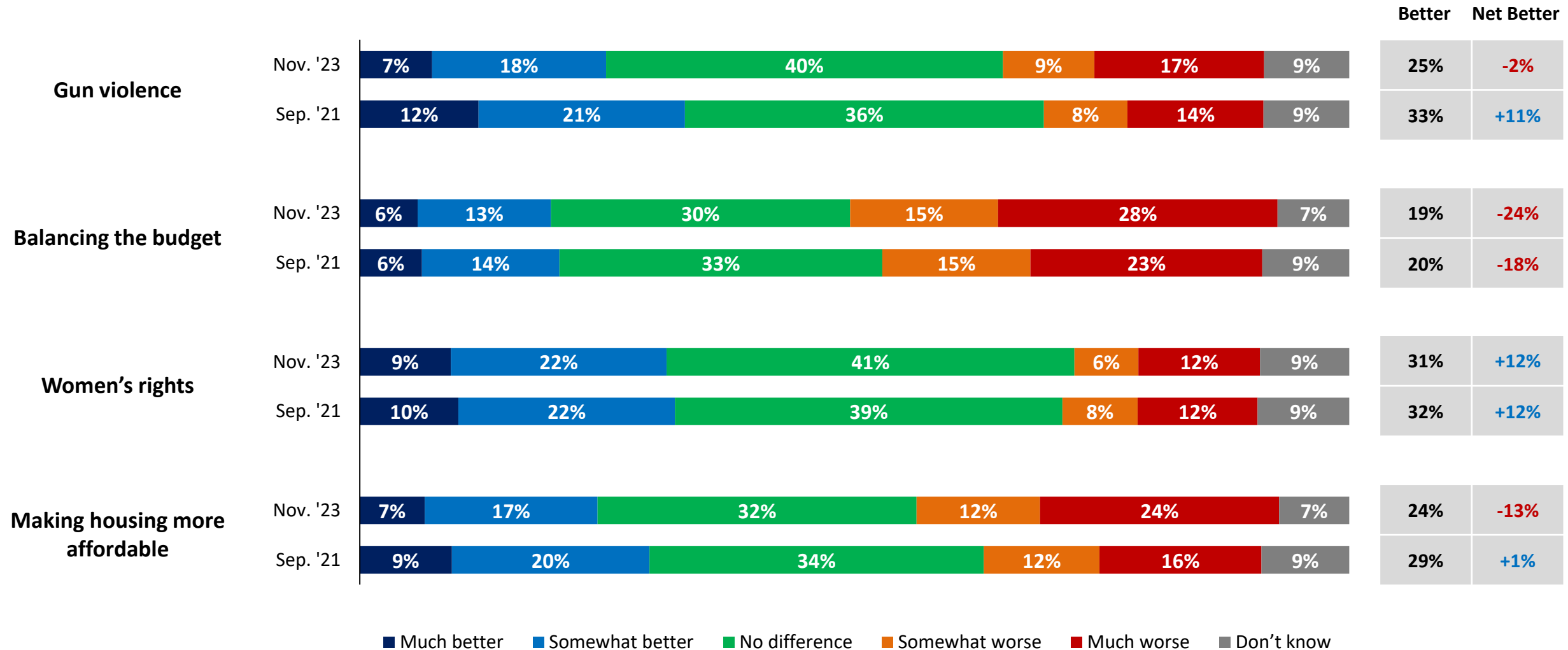
Liberal Brand Promise (Part 2):

Liberal brand promise down on all issues, now negative on 'Gun violence' and 'Making housing more affordable'



If the Liberal Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?

[asked of all respondents, n=2,500]



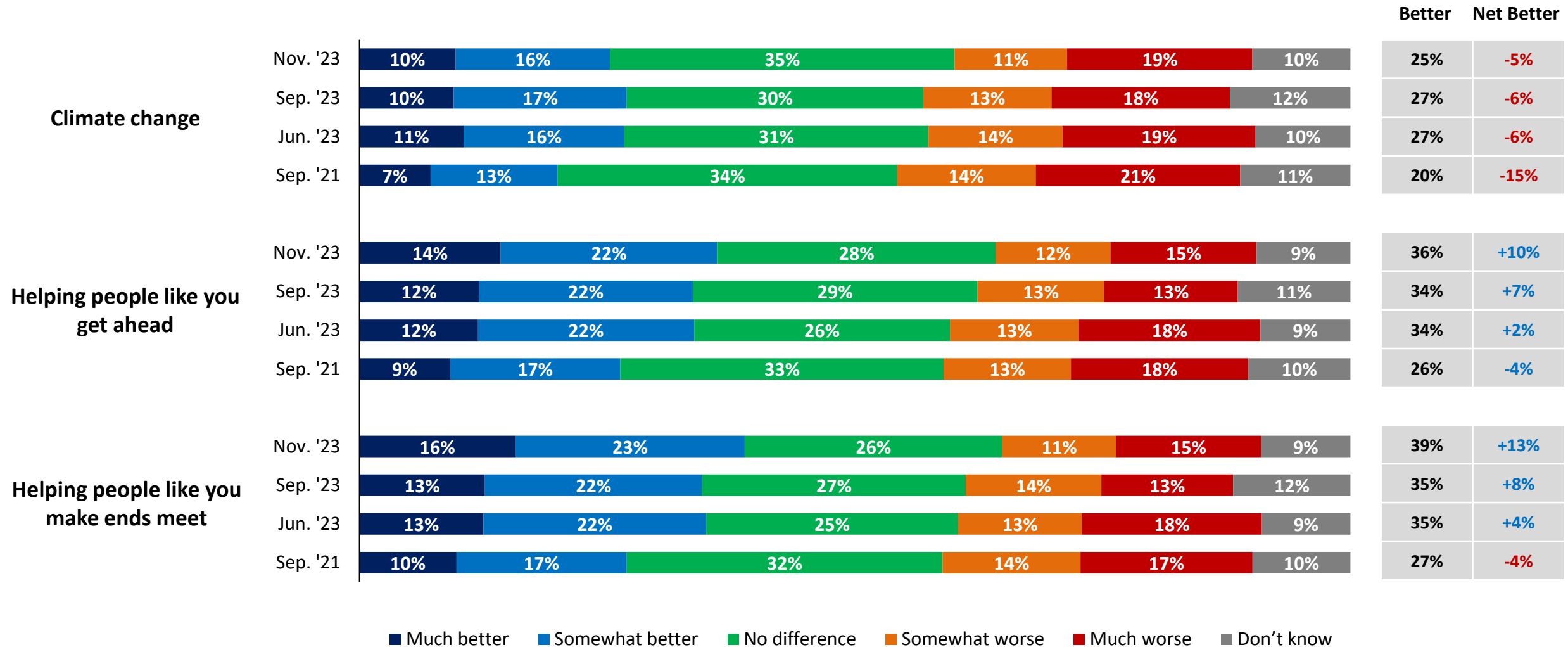
Conservative Brand Promise (Part 1):

Conservative brand promise is up on all three issues, but still net negative on climate change



If the Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?

[asked of all respondents, n=2,500]



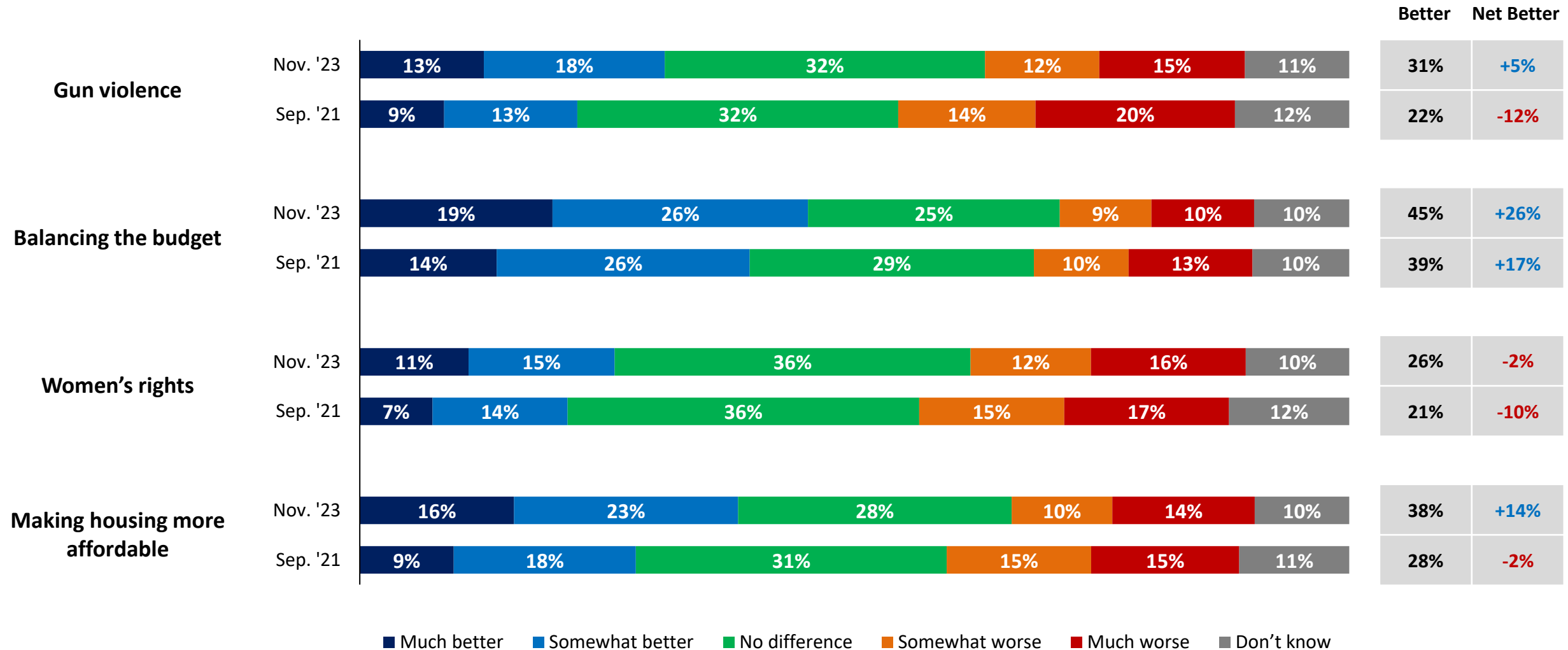
Conservative Brand Promise (Part 2):

Conservative brand promise up on all issues, flipping from negative to positive on two



If the Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues?

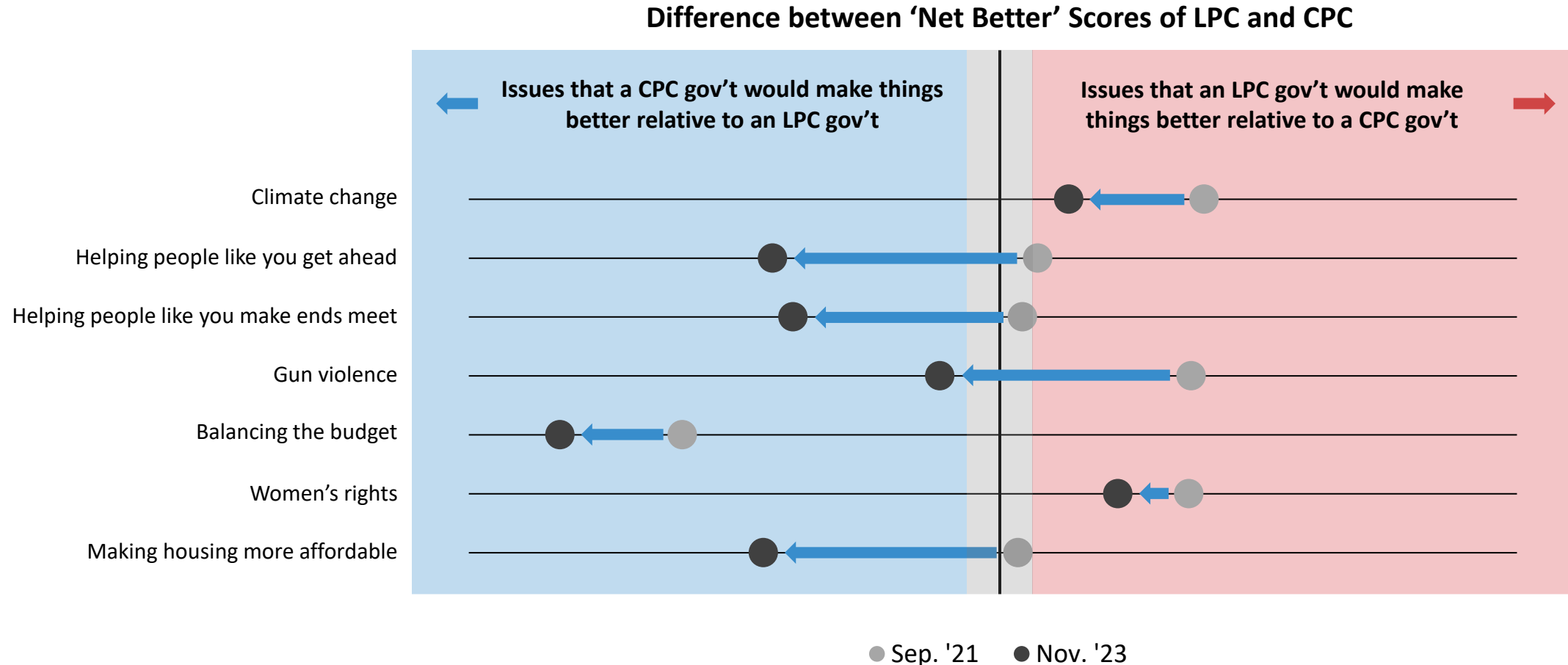
[asked of all respondents, n=2,500]



Liberal vs. Conservative Brand Promise:

There are large shifts towards Conservative preference on all issues since September '21

Q If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues...
[asked of all respondents, n=2,500]



Note: 'Net Better' is calculated as the sum of 'Much better' and 'Somewhat better' minus the sum of 'Much worse' and 'Somewhat worse'.
The distance between the two dots represents the difference between 'Net Better' scores of LPC and CPC.

Leader Attributes

Justin Trudeau is the least favourable leader; Poilievre and Singh are nearly tied

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.

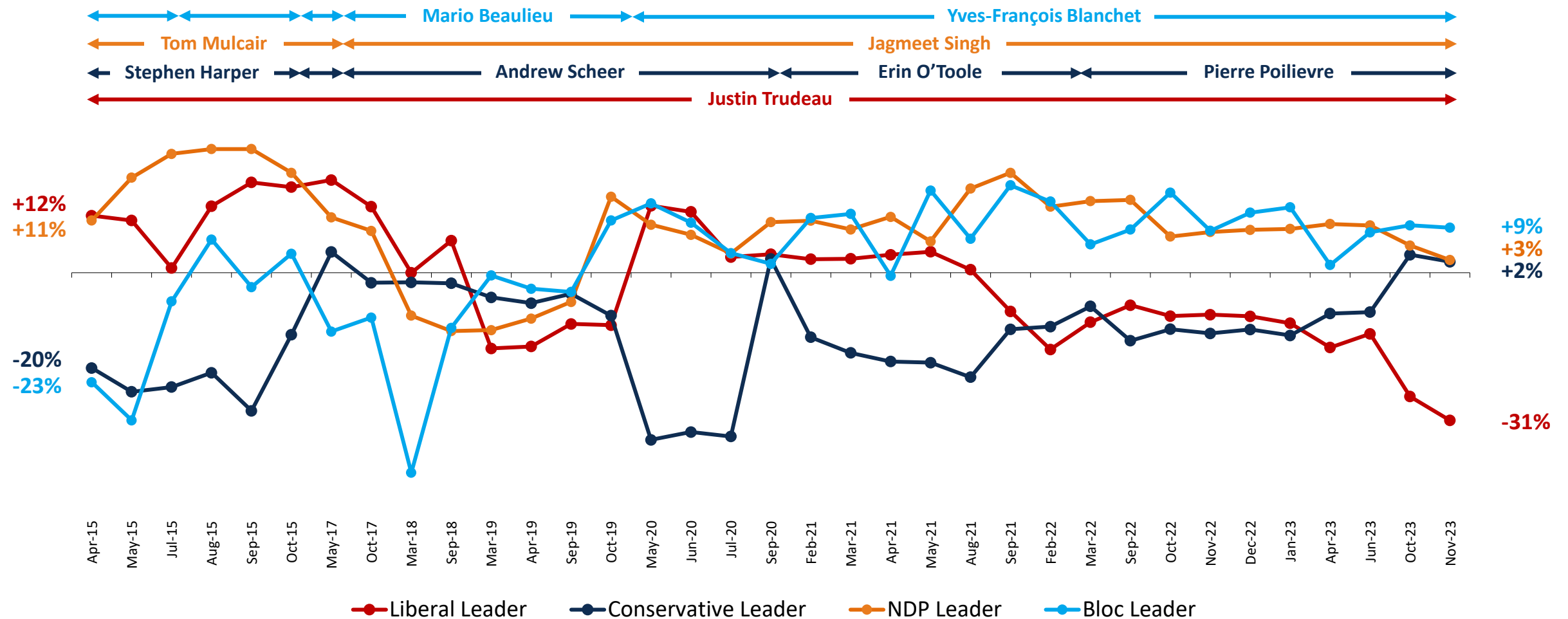
	[Asked of all respondents; N = 2,500]							Net Favourable
Justin Trudeau	8%	18%	15%	16%	41%			-31%
Pierre Poilievre	17%	18%	19%	10%	23%	7%	6%	+2%
Jagmeet Singh	11%	23%	24%	13%	19%	5%	5%	+3%
Yves-François Blanchet	12%	20%	28%	9%	14%	12%	5%	+9%
Elizabeth May	5%	15%	31%	12%	14%	14%	10%	-6%
Maxime Bernier	4%	9%	24%	12%	27%	14%	10%	-26%

- Note:** Bloc leader results are exclusive to the residents of Québec.

Leader Favourability (Tracking):

Trudeau's favourability is declining, while Blanchet continues to be the most popular (QC residents only)

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=2,500]

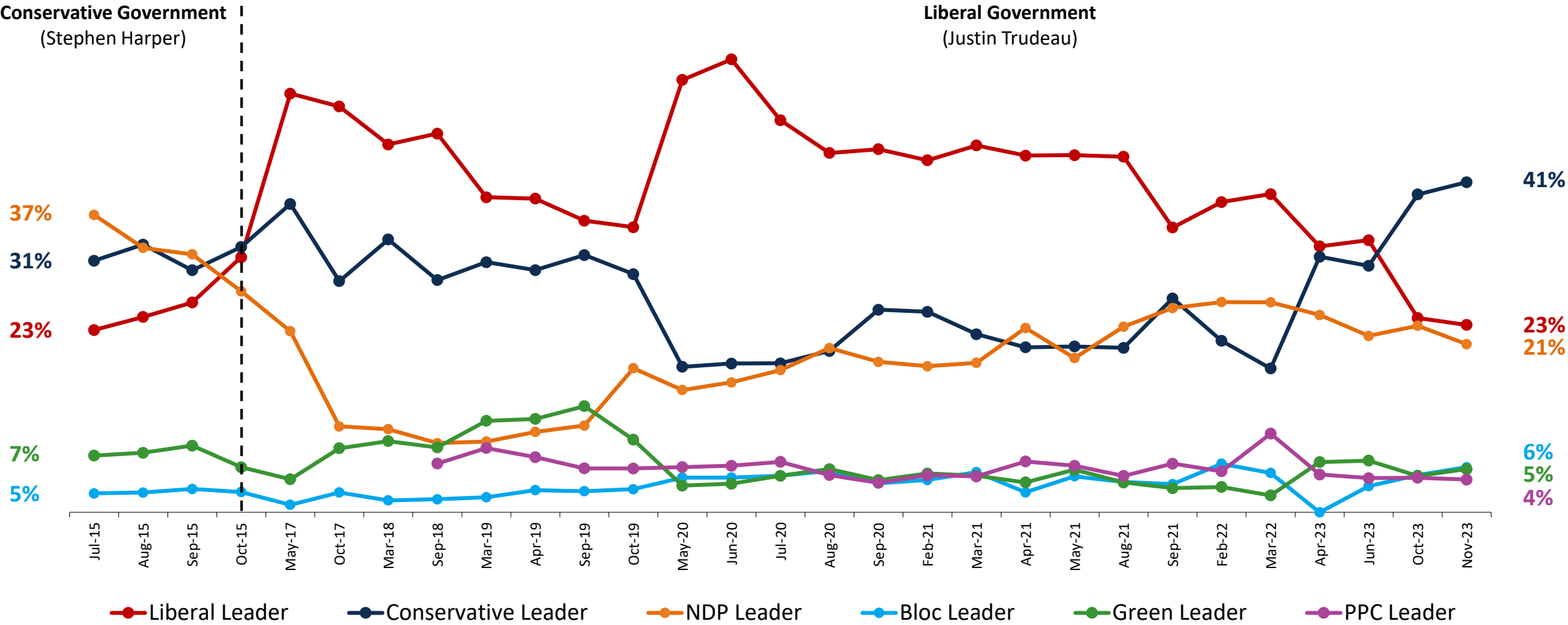


Note: Bloc leader results are exclusive to the residents of Québec.

Best Prime Minister (Tracking):

Poilievre holds an 18-point lead as the preferred choice for Prime Minister

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents, n=2,500]



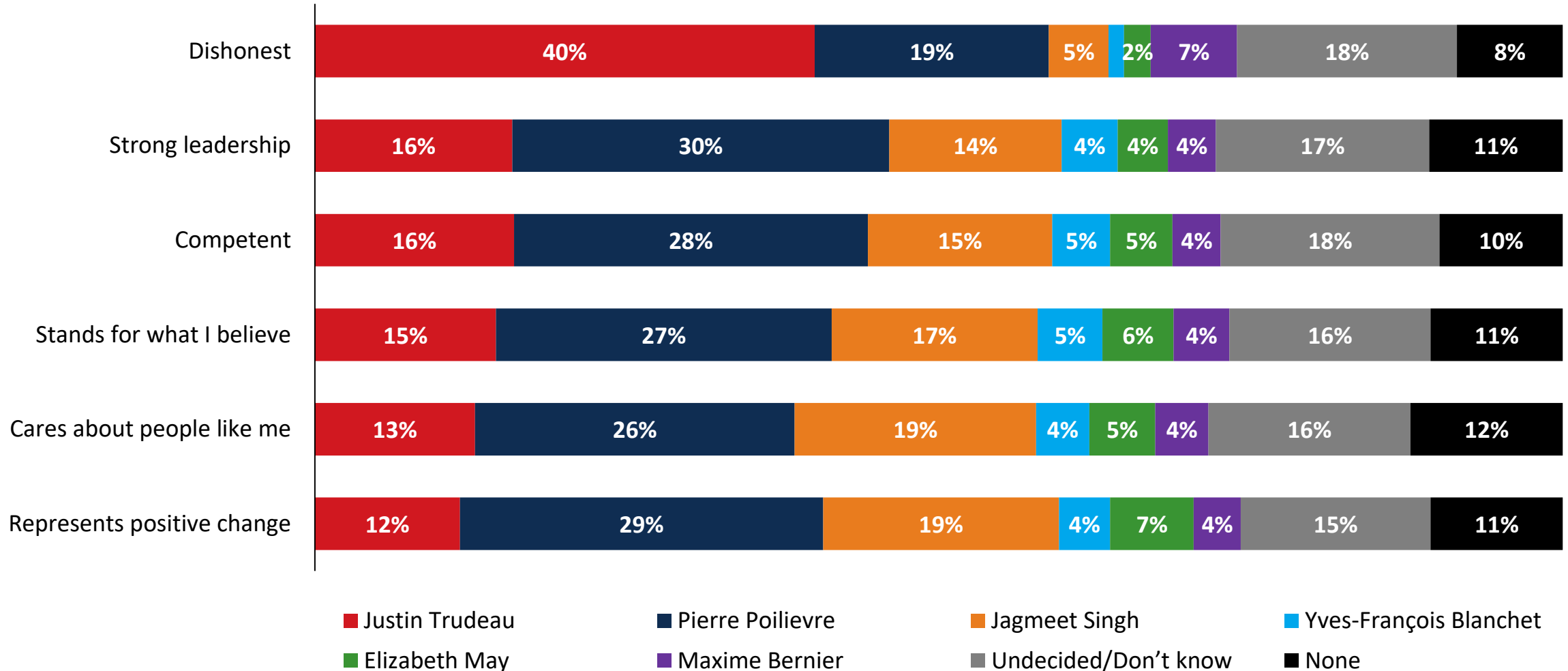
Note: Bloc leader results are exclusive to the residents of Québec.

Leader Attributes:

Trudeau most likely to be seen as dishonest, while Poilievre leads all positive attributes



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...
[asked of all respondents, n=2,500]



Leader Attributes | Dishonest:

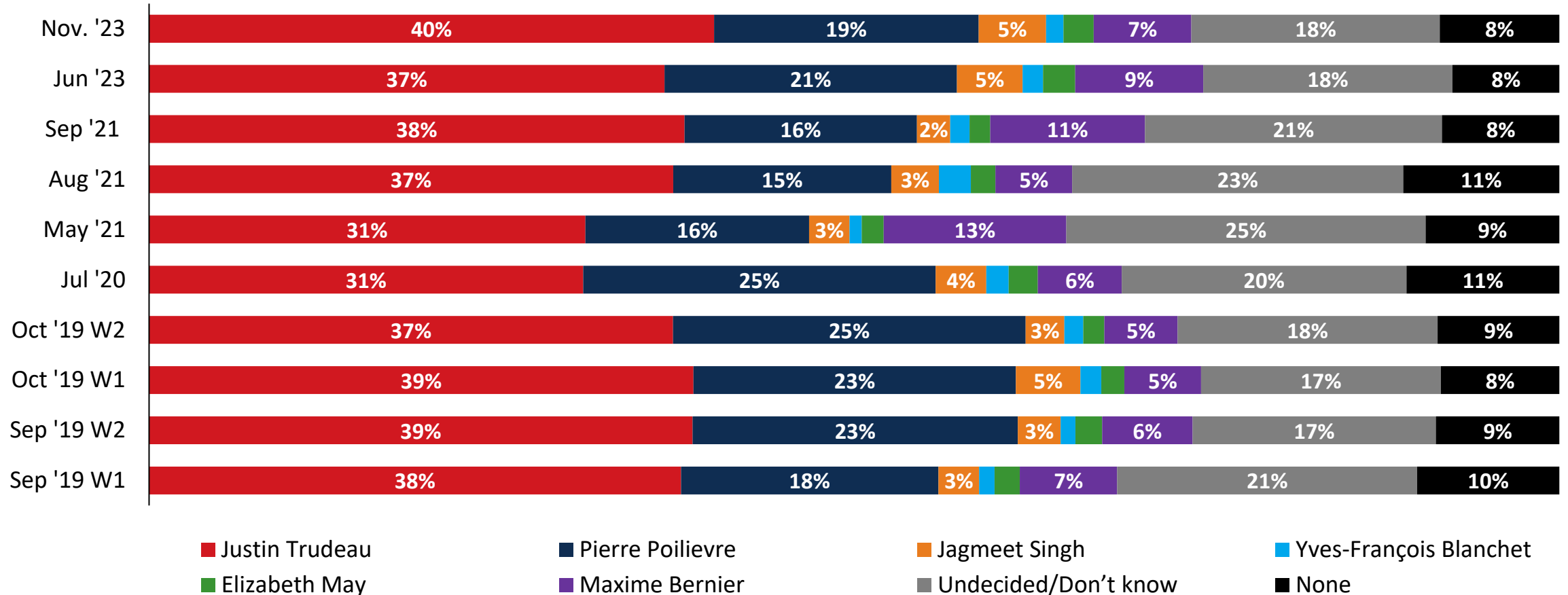
Trudeau now more likely than ever to be seen as dishonest

Q

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Dishonest

[asked of all respondents, n=2,500]



Leader Attributes | Strong Leadership:

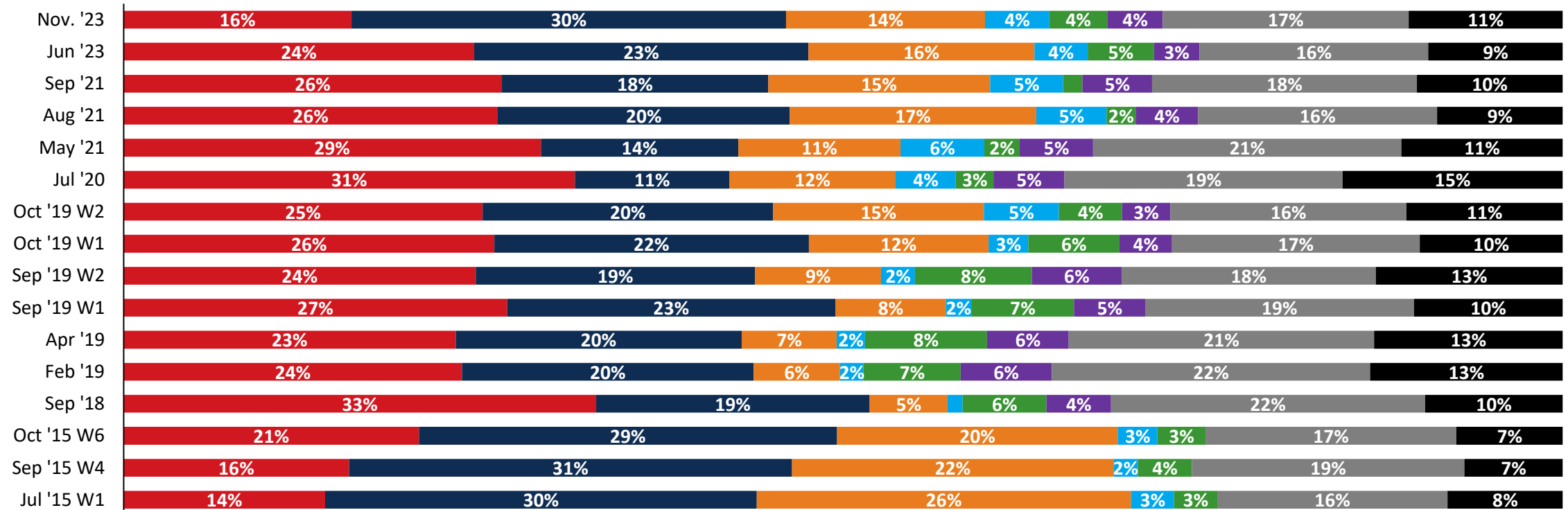
For the first time since 2015, CPC leader leads 'Strong leadership' with 30%

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Strong Leadership

[asked of all respondents, n=2,500]



Justin Trudeau

Pierre Poilievre

Jagmeet Singh

Yves-François Blanchet

Elizabeth May

Maxime Bernier

Undecided/Don't know

None

Leader Attributes | Competent:

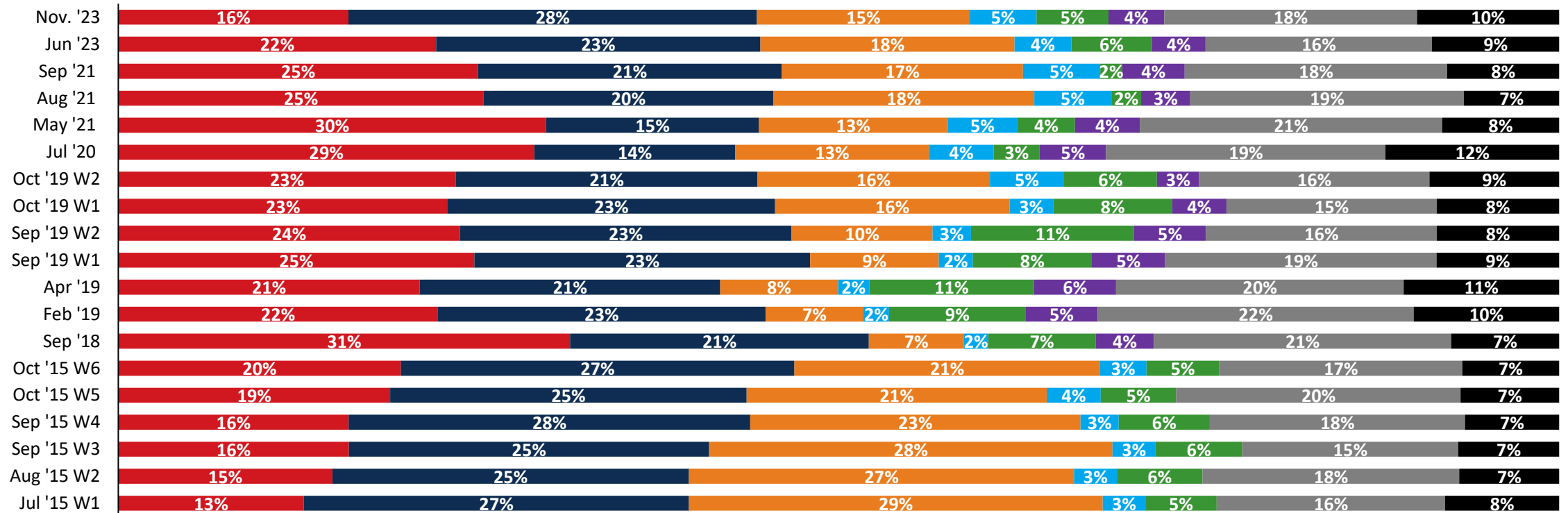
Trudeau's share for 'Competence' down 6 points since June, Poilievre's up 5

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Competent

[asked of all respondents, n=2,500]



■ Justin Trudeau

■ Pierre Poilievre

■ Jagmeet Singh

■ Yves-François Blanchet

■ Elizabeth May

■ Maxime Bernier

■ Undecided/Don't know

■ None

Leader Attributes | Stands for what I believe:

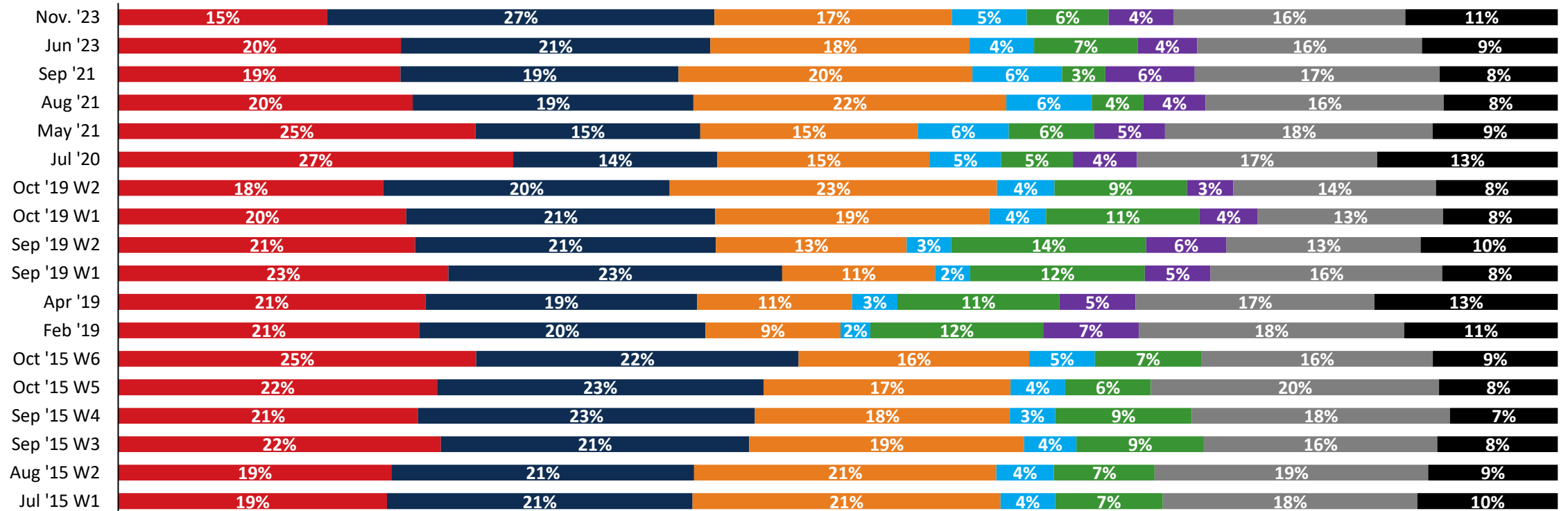
Trudeau's share for 'Stands for what I believe' down 5 points since June, Poilievre's up 6

Q

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Stands for what I believe

[asked of all respondents, n=2,500]



■ Justin Trudeau

■ Pierre Poilievre

■ Jagmeet Singh

■ Yves-François Blanchet

■ Elizabeth May

■ Maxime Bernier

■ Undecided/Don't know

■ None

Leader Attributes | Cares about people like me:

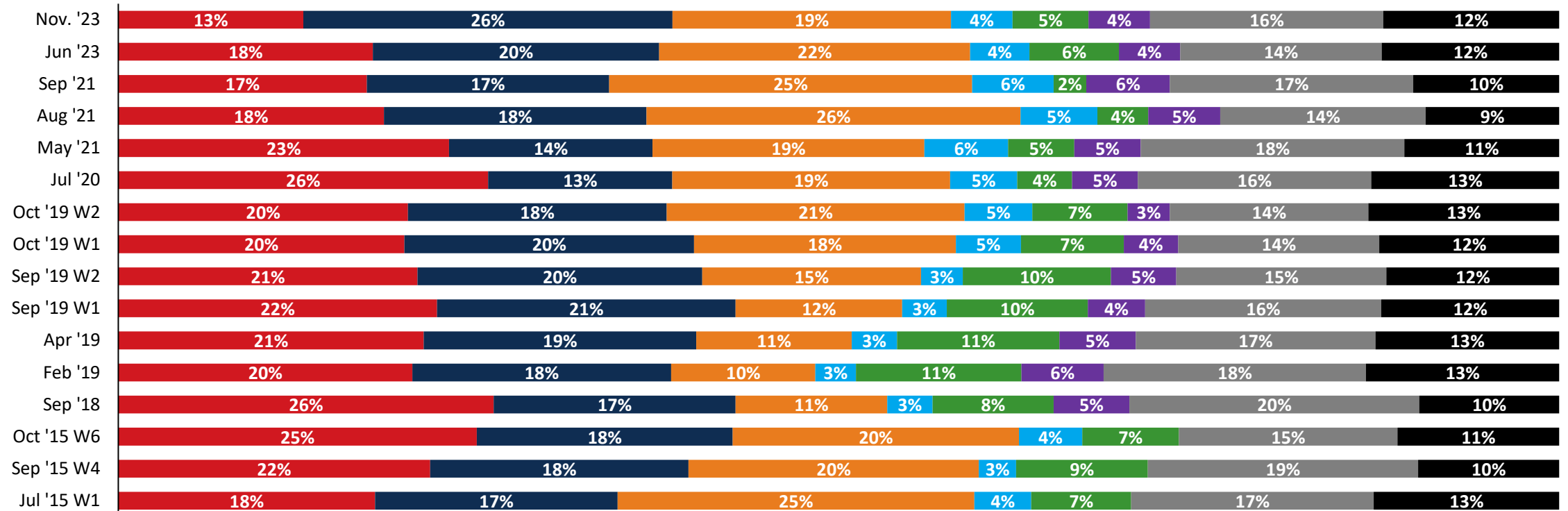
Trudeau's share for 'Cares about people like me' down 5 points since June, Poilievre's up 6

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Cares about people like me

[asked of all respondents, n=2,500]



Justin Trudeau

Pierre Poilievre

Jagmeet Singh

Yves-François Blanchet

Elizabeth May

Maxime Bernier

Undecided/Don't know

None

Leader Attributes | Represents positive change:

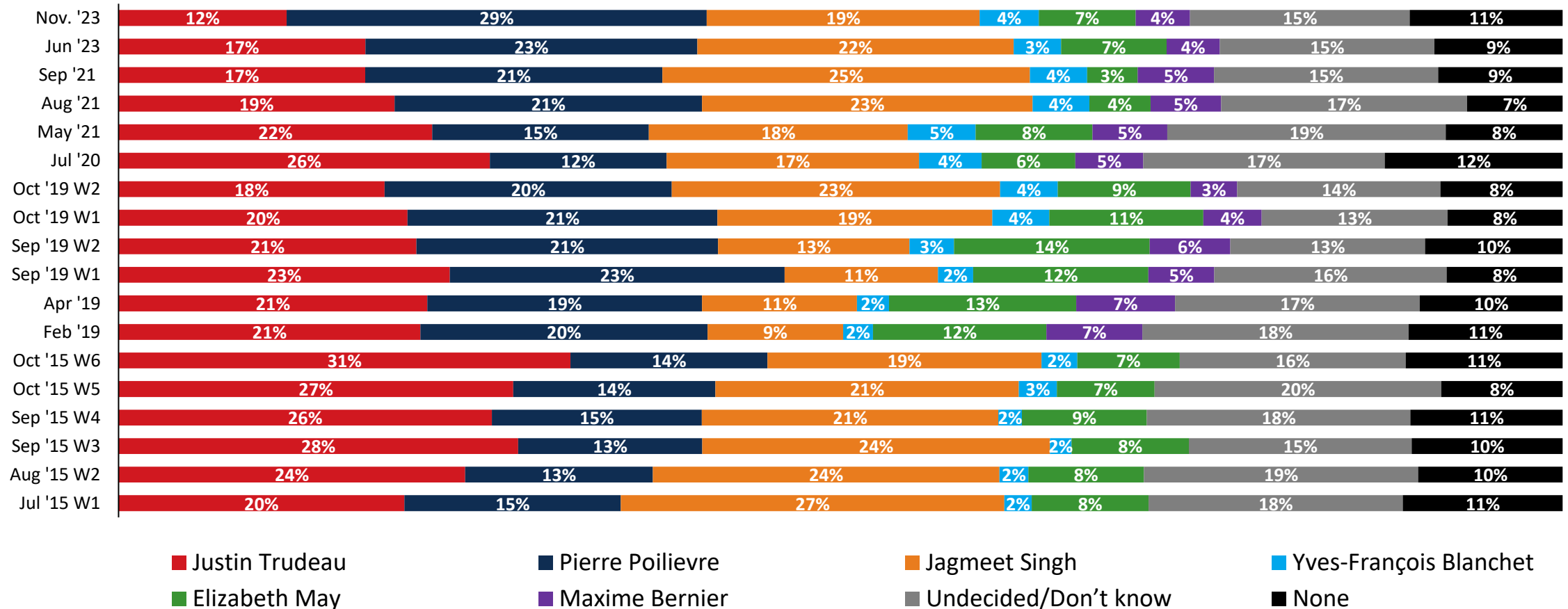
Trudeau's share for 'Represents positive change' down 5 points since June, Poilievre's up 6

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Represents positive change

[asked of all respondents, n=2,500]



Leader Brands

Justin Trudeau's Brand:

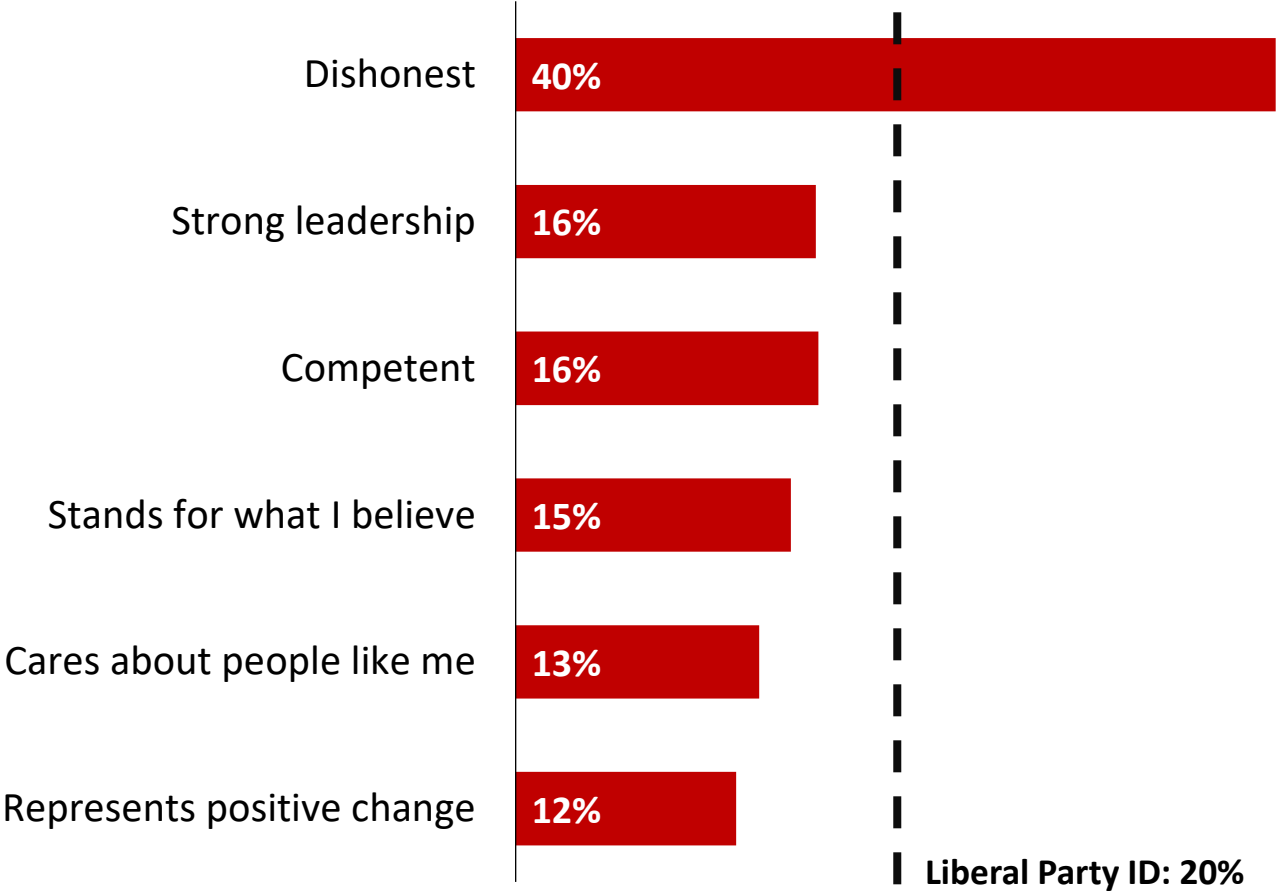
Despite 20% identifying as Liberal, Trudeau underperforms on all attributes



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Justin Trudeau

[asked of all respondents, n=2,500]



Pierre Poilievre's Brand:

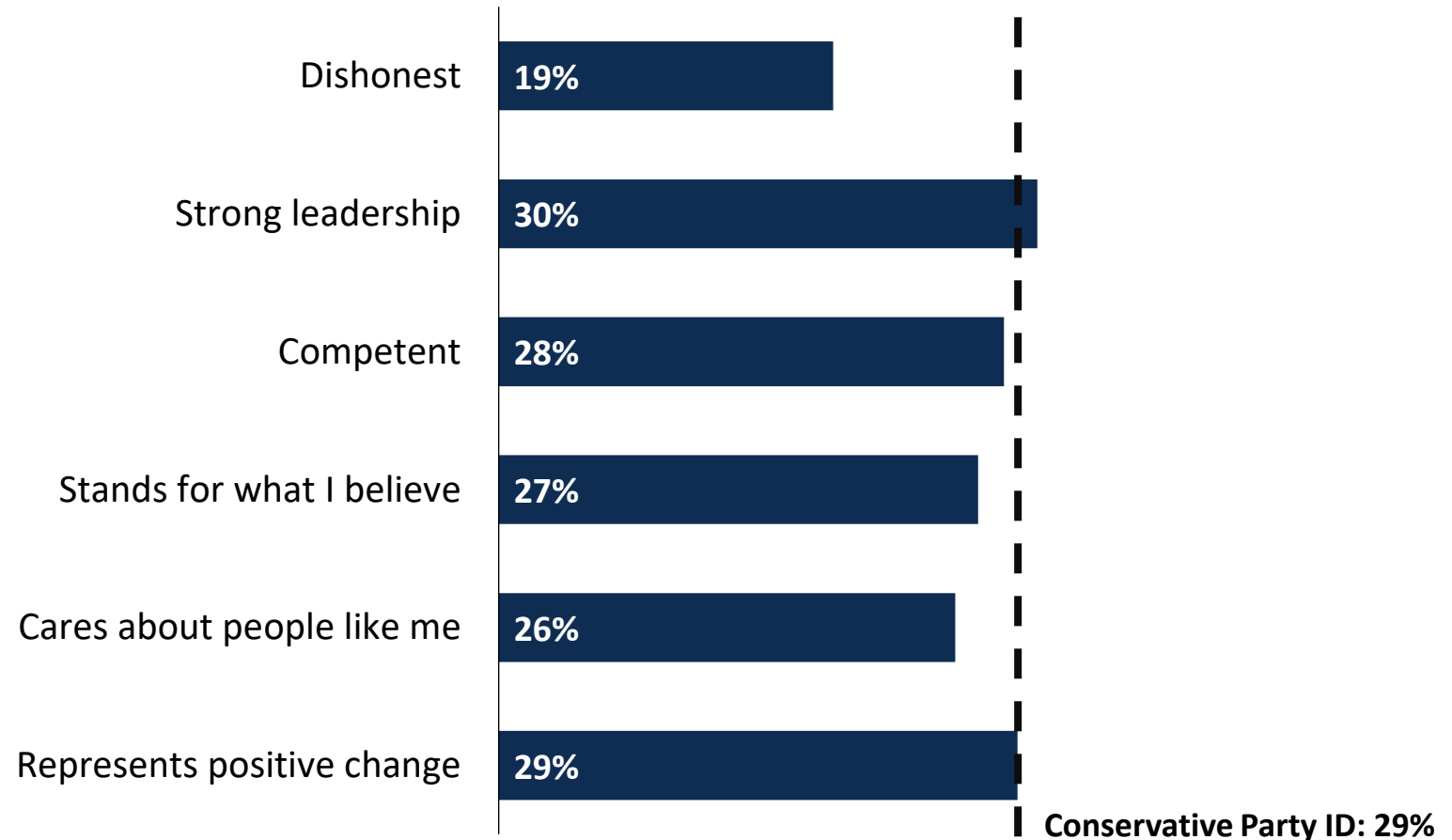
Poilievre performs similar to Conservative party ID share



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Pierre Poilievre

[asked of all respondents, n=2,500]



Jagmeet Singh's Brand:

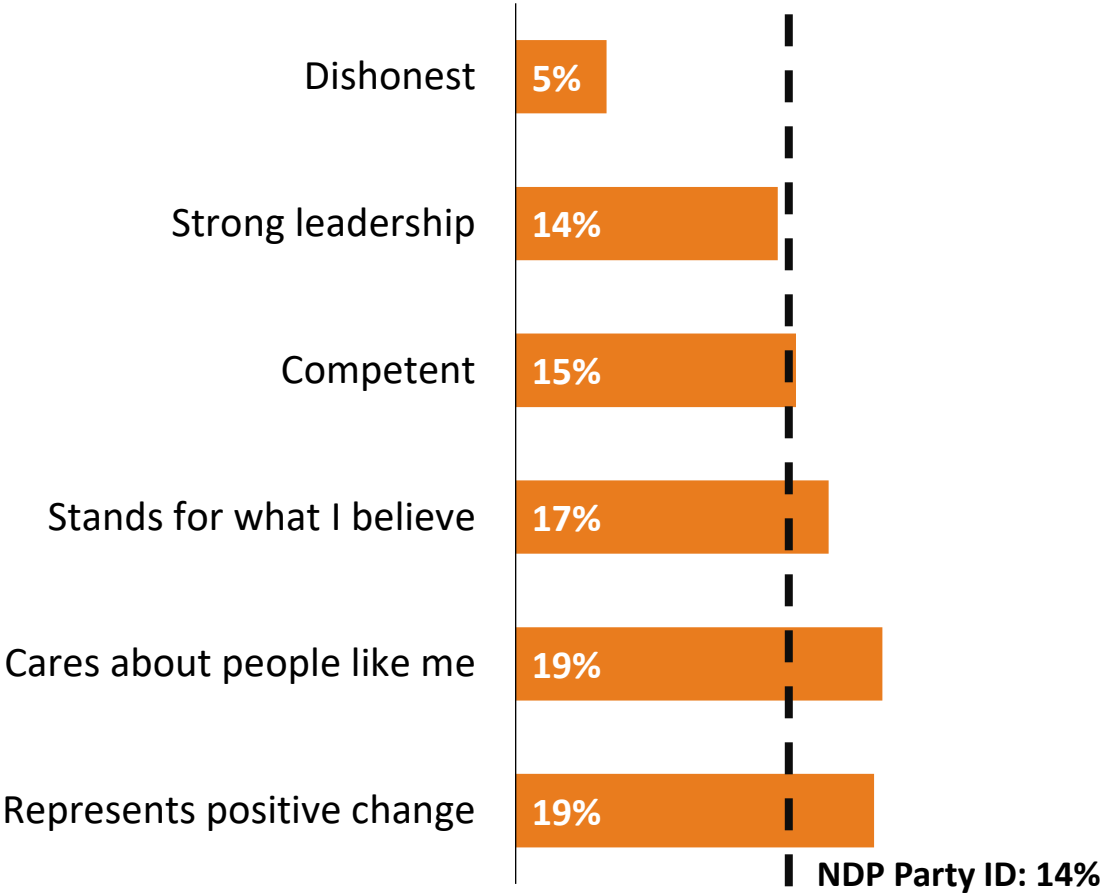
Singh overperforms on all attributes except 'Strong leadership'



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Jagmeet Singh

[asked of all respondents, n=2,500]



Yves-François Blanchet's Brand:

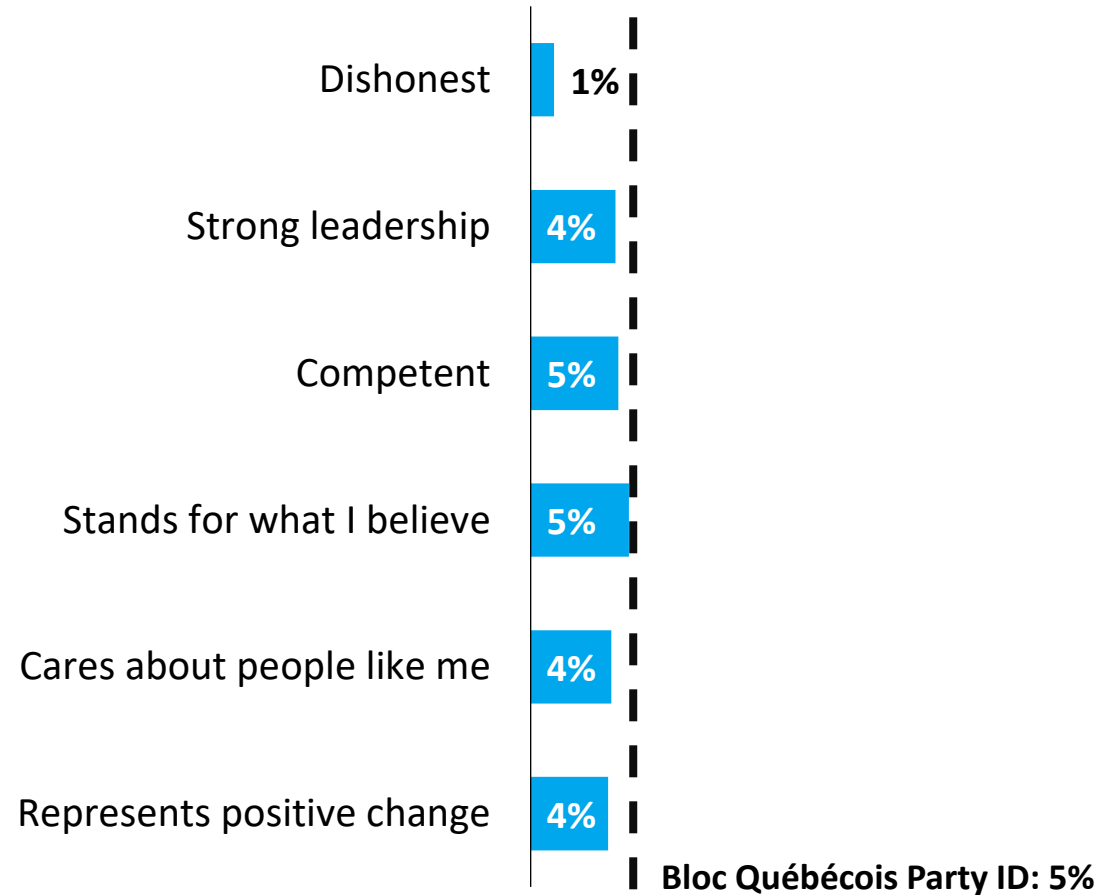
Blanchet slightly underperforms on most attributes



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Yves-François Blanchet

[asked of all respondents, n=2,500]



Elizabeth May's Brand:

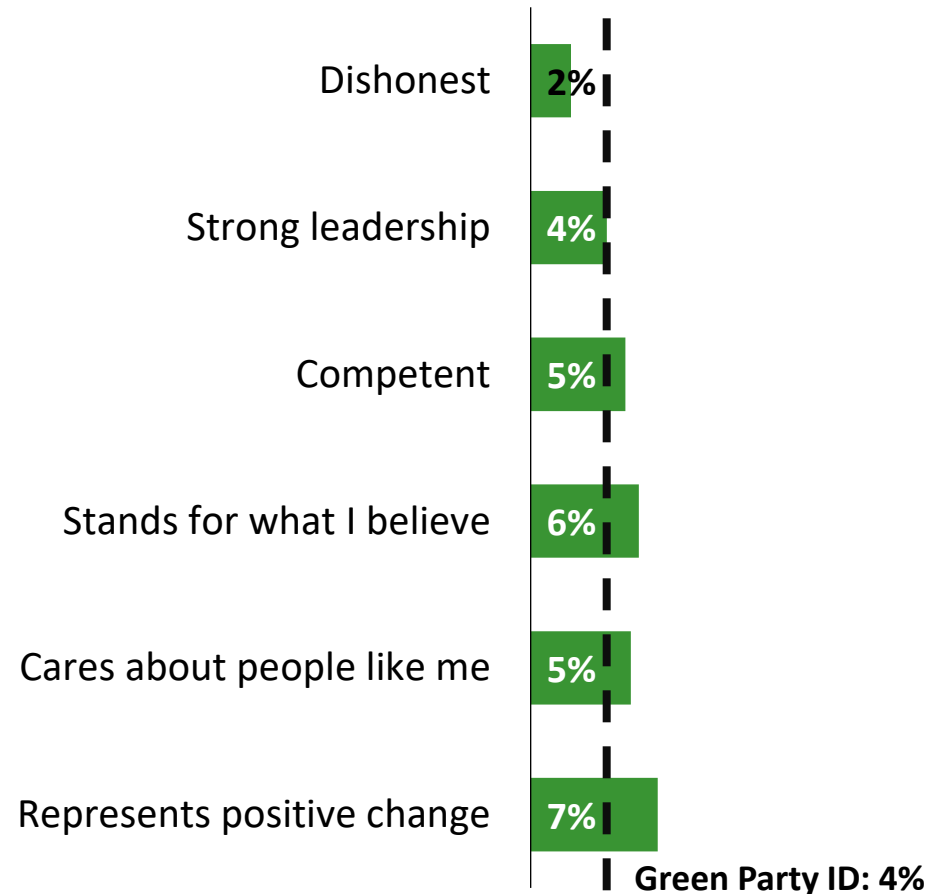
May slightly overperforms on most attributes



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Elizabeth May

[asked of all respondents, n=2,500]



Maxime Bernier's Brand:

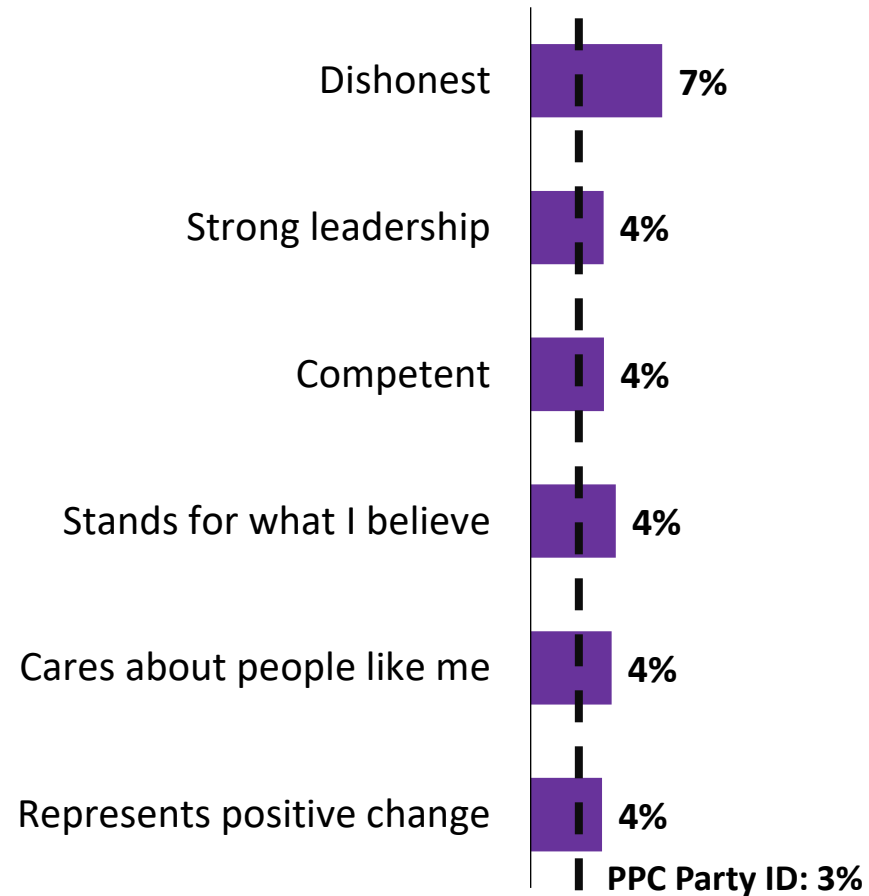
Bernier slightly overperforms on most attributes

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

Maxime Bernier

[asked of all respondents, n=2,500]



Seat Model

Overview

In Canadian elections, we count *seats* not *votes*.

For this analysis, seats have been grouped into **clusters**, with a focus on similarities in historical party success and regional characteristics within each cluster.

These seat clusters can help us better understand shifts in party support within ridings that have traditionally exhibited similar voting patterns. Each cluster is listed on the right with the sample size of respondents from that cluster.

The core analysis guiding these groupings relies on the election results in each seat over the past three elections. This approach provides insight into the potential range of outcomes in each seat based on recent electoral history.

The analysis further distinguishes “Strong” seats, indicating those consistently won by a margin greater than 10%. Additionally, specific criteria for each party and geographical factors are taken into account to refine the distinctions within each cluster.

You can read more about the methodology [here](#).

Seat Clusters	Seats	Weighted Sample Size (Nov. '23)
CPC Strong (Non-Prairies)	37	266
CPC Strong (Prairies)	44	262
CPC-LPC Swing (Non-Ontario)	31	169
CPC-LPC Swing (Ontario)	30	176
CPC-to-LPC Defector	34	248
LPC Strong	42	265
Consistent NDP	29	202
Swing NDP	28	170
Montreal BQ-LPC Swing	22	135
Regions BQ-LPC Swing	25	144
Capitale-Nationale + Chaudière-Appalaches	13	74
Green/Other	3	Too small to report on

Federal Decided Vote by Seat Clusters:

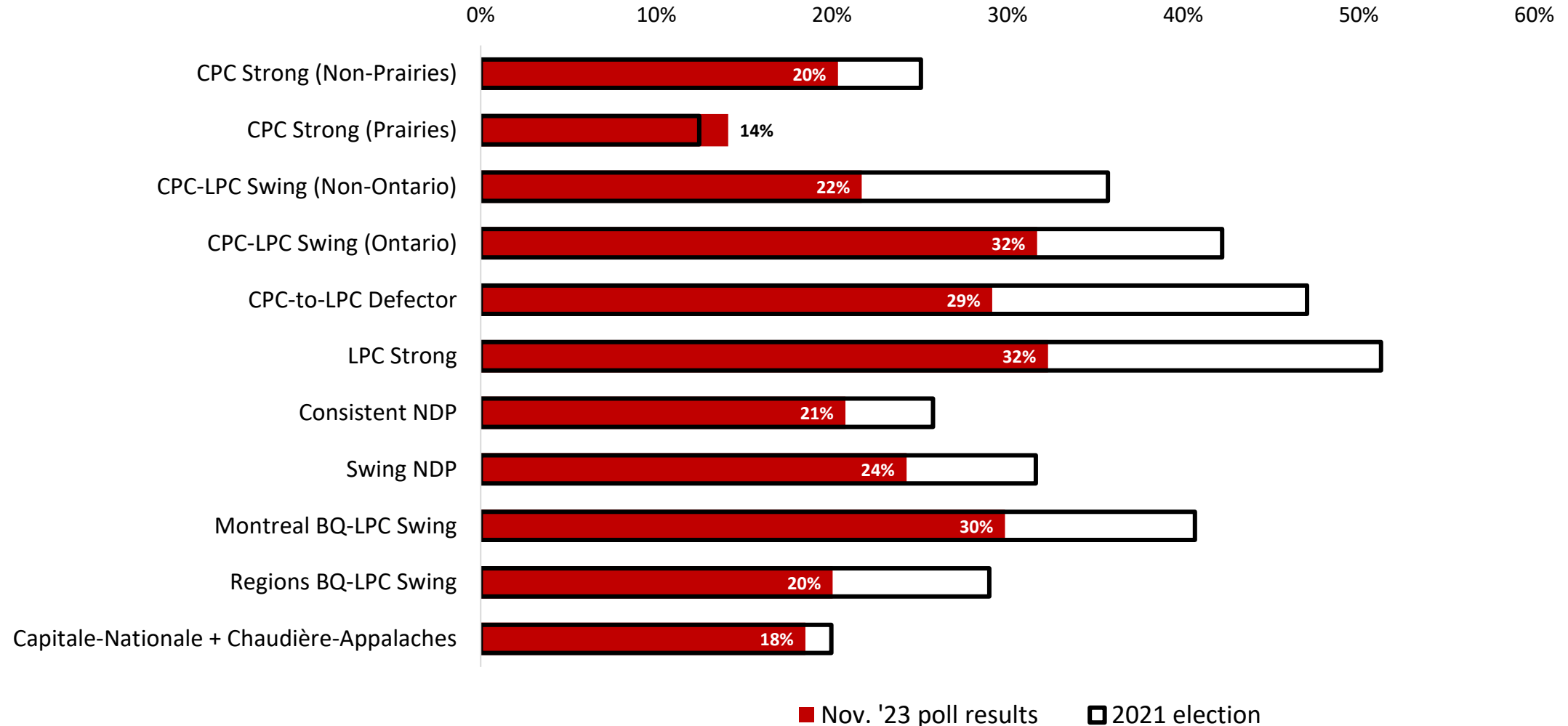
Conservatives lead CPC-to-LPC Defector cluster by 10 points and LPC Strong cluster by 1 point

Federal Seat Clusters													
Decided Vote	Nov. '23	Total	CPC Strong Non-Prairies	CPC Strong Prairies	CPC-LPC Swing Non-Ontario	CPC-LPC Swing Ontario	CPC-to-LPC Defector	LPC Strong	Consistent NDP	Swing NDP	Montreal BQ-LPC Swing	Regions BQ-LPC Swing	Capitale-Nationale + Chaudière-Appalaches
		n=2,130	n=266	n=262	n=169	n=176	n=248	n=265	n=202	n=170	n=135	n=144	n=74
	Conservative	40%	49%	60%	47%	41%	39%	33%	30%	37%	23%	22%	34%
	Liberal	24%	20%	14%	22%	32%	29%	32%	21%	24%	30%	20%	18%
	NDP	19%	18%	19%	23%	16%	20%	19%	27%	25%	9%	10%	10%
	Bloc	7%	0%	0%	0%	0%	0%	3%	12%	0%	29%	39%	29%
	Green	5%	6%	3%	5%	8%	7%	6%	7%	5%	4%	4%	2%
	Other	5%	7%	4%	4%	4%	4%	7%	3%	9%	5%	5%	5%

Liberal Vote Share Change:

Liberals lose ground in every riding cluster except CPC Strong (Prairies)

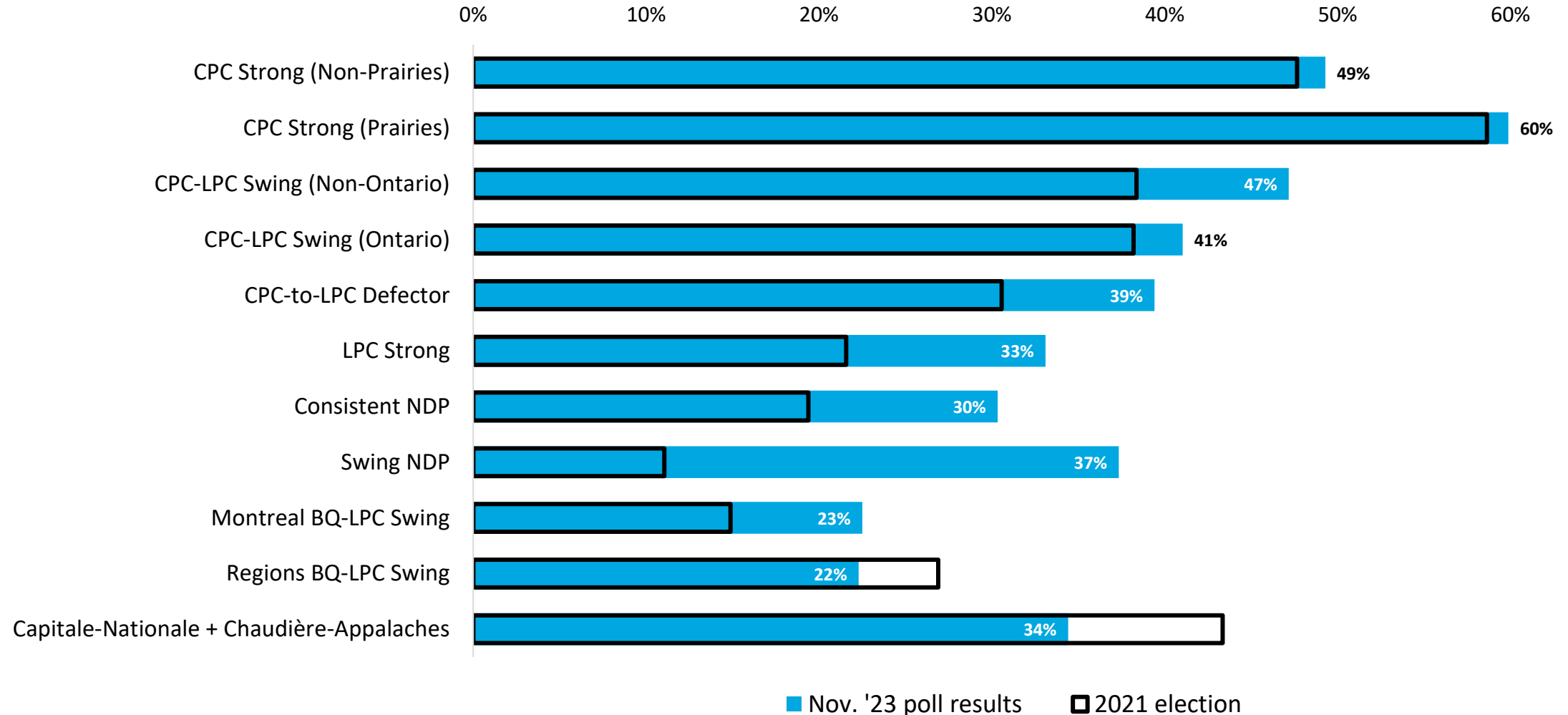
LPC decided vote in November 2023 poll vs. 2021 election results:



Conservative Vote Share Change:

Conservatives gain in every riding cluster except Regions BQ-LPC Swing and C.N.-C.A.

CPC decided vote in November 2023 poll vs. 2021 election results:



Seat Modelling Methodology

Seat models

Our seat models are constructed through simulations of 1,000 potential election outcomes, predicated on the assumption that the results align with our latest polling data. The model categorizes seats and polling results by our riding clusters. The model is **not** a prediction that accounts for potential shifts in polls throughout the campaign. Rather, it offers a snapshot of how current polling results are likely to translate into seat outcomes in an actual election. Each simulation generates a predicted result for each seat, considering variations from the polling based on the margin of error for a poll of that sample size, as well as potential differences from the overall polling trend in each individual seat.

Detailed approach

Each simulated election outcome is generated in three steps:

1. First, we consider the potential variations in polling results attributable to regular sampling errors. Within each simulation, we randomly introduce sampling errors for each political party in every seat cluster. These random errors are negatively correlated, meaning that if one simulation suggests an improvement for the Conservatives, other parties are likely to experience a slight decline, maintaining a realistic balance.
2. Second, we use the adjusted polling results to run a basic proportional swing model, producing a predicted outcome for each electoral riding. For instance, if the adjusted polling indicates that the Liberals have doubled their vote in a specific group of seats, we apply a proportional swing of 2x to their 2021 results within that group.
3. Finally, we introduce additional random errors in each seat to address the potential discrepancies at the riding level that a swing model may not capture. This random error is slightly correlated at the group level, acknowledging that if a party outperforms its poll prediction in one seat, there is a slightly increased likelihood of similar deviations in other comparable seats.

By repeating this process multiple times, we obtain distributions representing the possible election outcomes on a riding-by-riding basis. This approach takes into account polling swings in the targeted seat groups while also accommodating the inherent variation in polling trends at the riding level, which cannot be predicted in advance.

Seat Model

When analyzing the outcomes by seat clusters, a natural question arises:

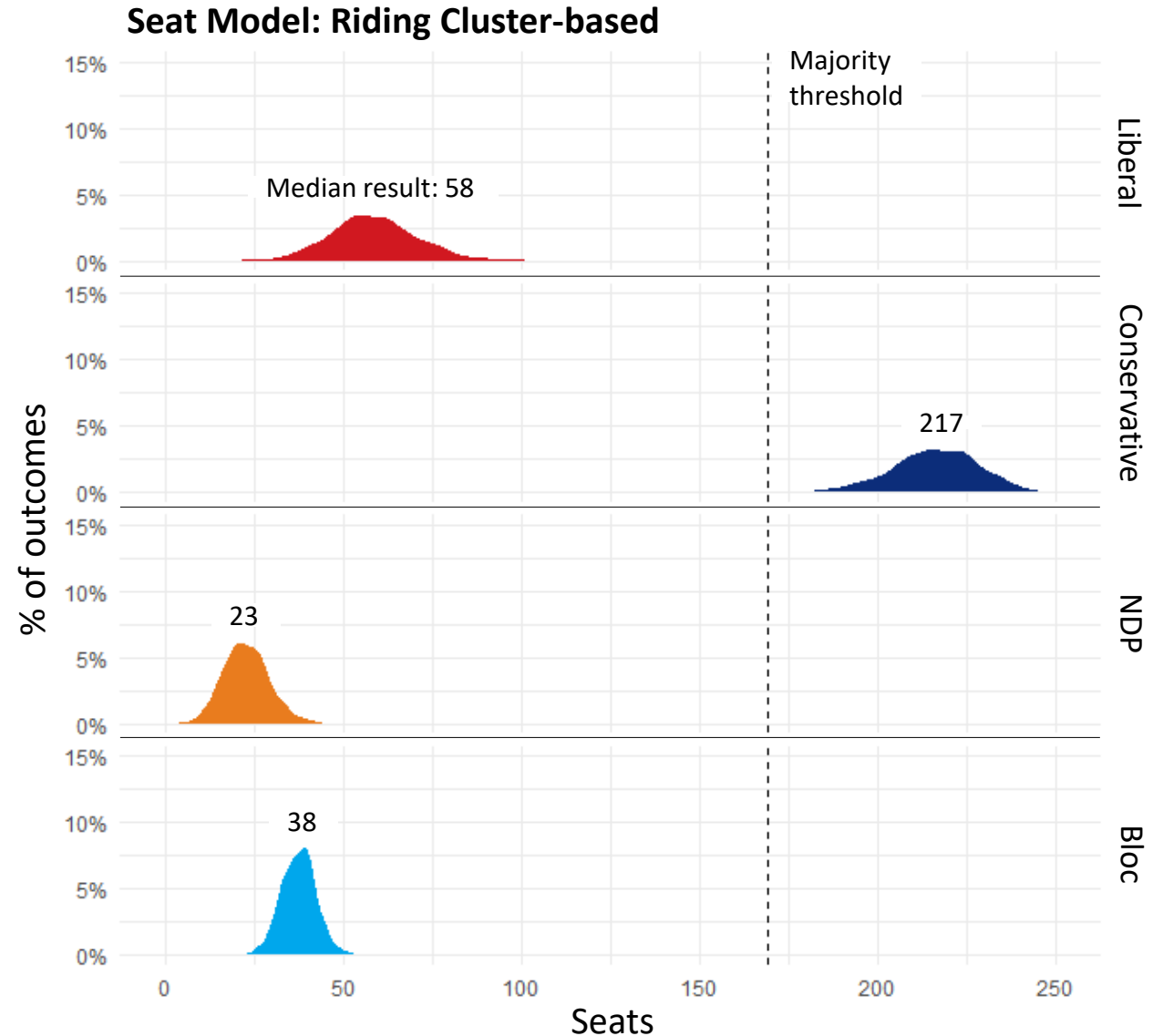
What implications do these results have for seat counts?

We can project these outcomes using our seat model.

Given a 16-point lead, the Conservatives are on track to secure a substantial majority. The median results on the right predict the median number of seats a given party would obtain through 1,000 simulated election outcomes. The density plots show the distribution of potential seat counts, highlighting the range of variability in electoral outcomes.

Conservatives, with a median seat count of 217, cross the majority threshold even with the lowest predicted seats in our seat model.

In contrast, Liberals, with a median seat count of 58, fail to approach a majority threshold even in the best-case scenario.





For more information, please contact:

Greg Lyle

President

(416) 642-6429

gyle@innovativeresearch.ca

Giorgi Buzaladze

Consultant

(364) 275-3913

gbuzaladze@innovativeresearch.ca

Report Contributors:

Conrad Eder, Consultant

Matthew Jupp, Research Analyst

Building Understanding.

