Politics and Energy in Canada Today

October 3, 2019

INNOVATIVE
RESEARCH GROUP

Online Sample Methodology

- This report combines the results of three online surveys conducted in September 2019.

- In total, the dataset contains a representative sample of n=6,420 Canadians, 18 years or older. Online samples for two of the surveys were provided by Lucid, while the third sample was provided by Dynata, both leading providers of online samples. The dates and sample sizes for each survey were:

    - *Election Benchmark Survey:* Conducted from September 10th to September 15th, 2019 with an unweighted sample size of 1,622 (weighted to 1,600)

    - *Ad-Testing Survey Wave 2:* Conducted from September 17th to September 24th, 2019 with an unweighted sample size of 2,496 (weighted to 2,300)

    - *Canada This Month Survey:* Conducted from September 20th to September 25th, 2019 with an unweighted sample size of 2,302 (weighted to 2,000)

- The combined sample is weighted to n=5,900 by age, gender and provincial sub-regions using the latest Statistics Canada Census data. Results are weighted to ensure that the overall sample's composition reflects that of the actual population to provide results that are intended to approximate a probability sample.

- Respondents were grouped together into their federal electoral districts based on their postal code. A weighted total of 441 respondents could not be grouped into a federal electoral district because they did not provide a postal code or their postal code matched multiple districts.

- INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

- 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.

INNOVATIVE
RESEARCH GROUP

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

Methodology

This is the second release on the results of an online survey conducted between September 20th and September 25th, 2019.

This online survey of 2,303 adult Canadians was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online sample. The results are weighted to n=2,000 based on Census data from Statistics Canada.

Respondents from the Canada 20/20 Panel and the Lucid constituent panels are recruited from a wide variety of sources to reflect the age, gender, region, and language characteristics of the country as a whole. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

INNOVATIVE provides each panellist with a unique URL via an email invitation so that only invited panel members are able to complete the survey, and panel members can only complete a particular survey once. Sub-regional quotas are set within regions to ensure there is a representative sample of respondents from across the entire region.

A total of 242 panelists started but did not finish the survey and another 1 panelists were screened out for exceeding age/gender/region quotas.

Confidence: This is a representative sample. However, since the online survey was not a random probability based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Weighting: Results for Canada are weighted by age, gender, and region to ensure that the overall sample's composition reflects that of the actual population according to Census data; in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Males 18-34	187	8.1%	275	13.8%
Males 35-54	312	13.6%	334	16.7%
Males 55+	702	30.5%	362	18.1%
Females 18-34	250	10.9%	272	13.6%
Females 35-54	360	15.6%	347	17.4%
Females 55+	491	21.3%	409	20.4%
BC	429	18.6%	272	13.6%
Alberta	314	13.6%	227	11.4%
Prairies	150	6.5%	133	6.7%
Ontario	907	39.4%	764	38.2%
Quebec	370	16.1%	467	23.4%
Atlantic	132	5.7%	136	6.8%

Federal Vote

Decided Federal Vote: The Liberals are steady since early September, maintain their directional lead over the Conservatives

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 VOTE]
[showing only decided voters; n=1,761]
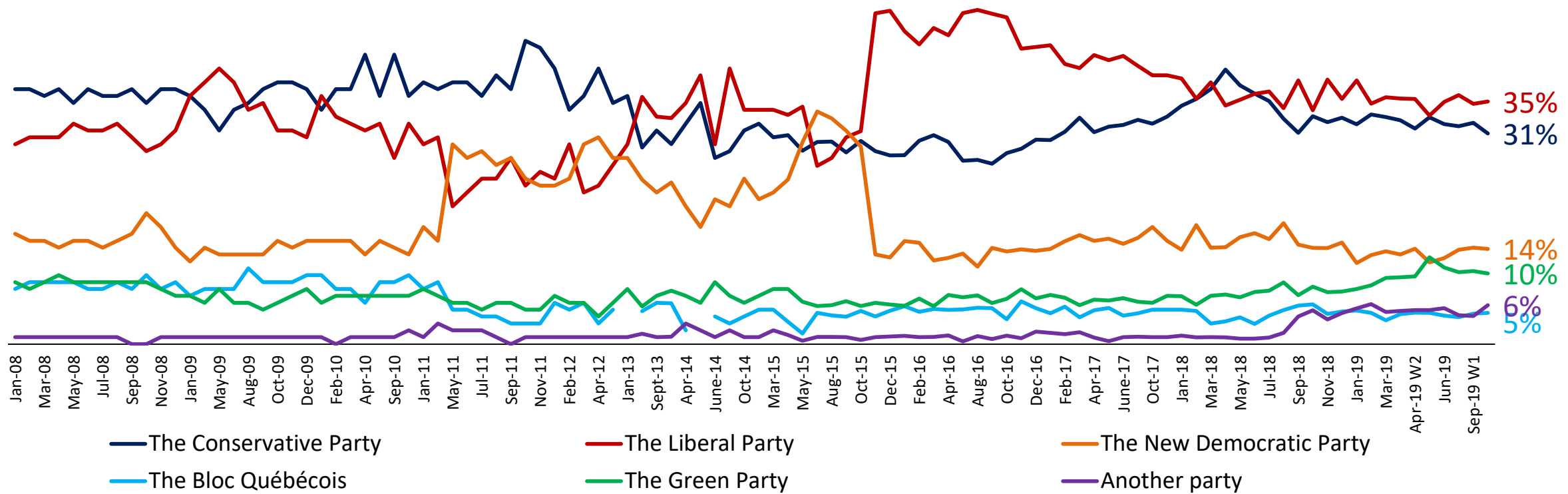
Note: People's Party of Canada has been added since September 2018, included in 'Another party'.

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

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]
[showing only decided voters; n=1,761]

Region	Conservative	Liberal	NDP	Bloc	Green	PPC/Other
Total	31%	35%	14%	5%	10%	6%
BC	28%	29%	22%		17%	4%
Alberta	52%	24%	13%		5%	6%
Prairies	41%	24%	15%		9%	11%
Ontario	30%	42%	14%		9%	5%
Quebec	21%	35%	10%	20%	10%	6%
Atlantic	29%	39%	13%		14%	5%

Legend: Conservative, Liberal, NDP, Bloc, Green, PPC/Other

INNOVATIVE RESEARCH GROUP
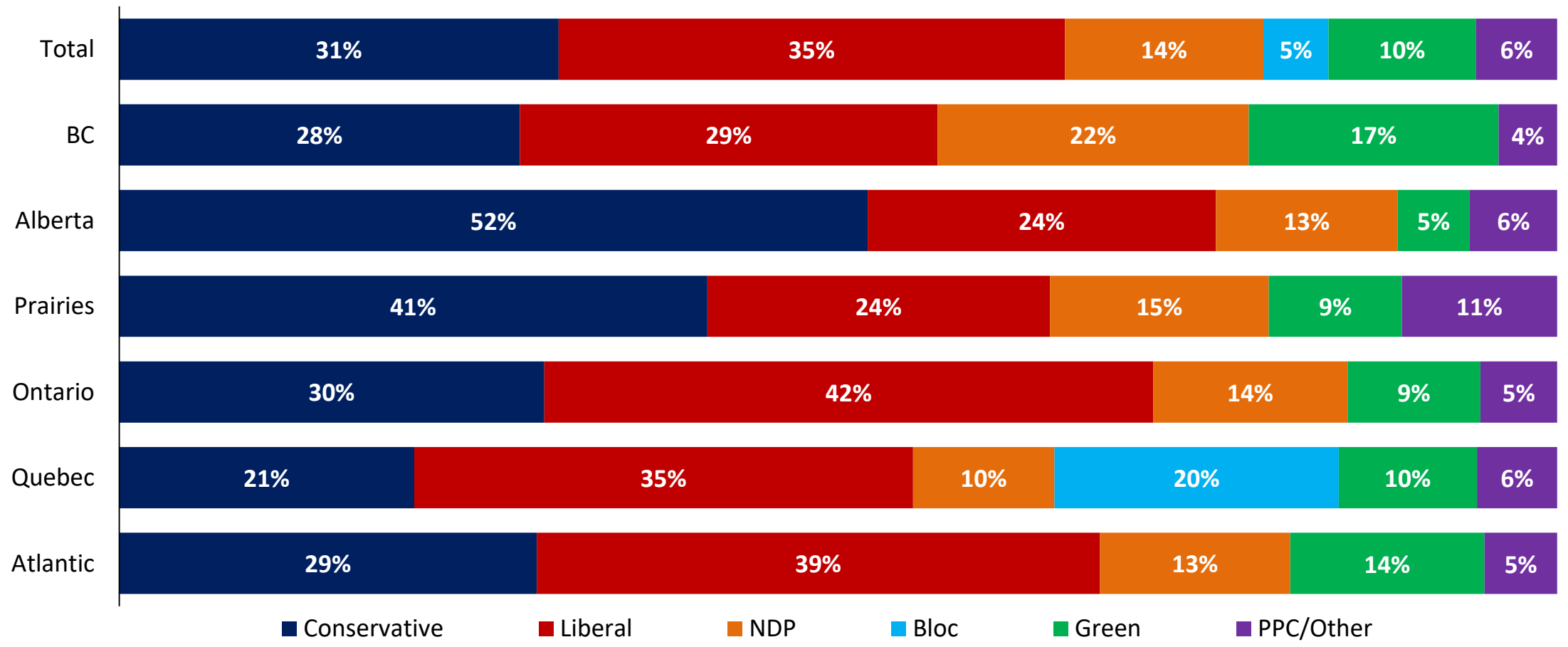
2nd Choice by 1st Choice: A third (31%) of Liberal voters say the NDP is their second choice, while another quarter say the Green Party is theirs

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

Combined Vote

2nd Choice	Conservative	Liberal	NDP	Bloc [QC Only]	Green	Other
Conservative	n/a	11%	11%	17%	12%	38%
Liberal	9%	n/a	29%	12%	23%	13%
NDP	13%	31%	n/a	13%	30%	8%
Bloc	2%	4%	3%	n/a	3%	4%
Green	13%	25%	32%	18%	n/a	16%
People's Party	16%	3%	4%	4%	7%	0%
Other	2%	1%	0%	1%	1%	6%
Undecided/ Don't know	24%	16%	16%	21%	19%	10%
Would not vote/Nobody	22%	10%	5%	15%	5%	4%

Voter Pools: While the Liberals and Conservatives have similarly sized bases, the Liberals have more soft and 2nd choice voters

Liberals — 37%
- Non: 51%
- Undecided: 12%
- Second choice: 6%
- Soft: 12%
- Decided: 19%

Conservatives — 32%
- Non: 56%
- Undecided: 12%
- Second choice: 5%
- Soft: 9%
- Decided: 18%

NDP — 20%
- Non: 69%
- Undecided: 12%
- Second choice: 7%
- Soft: 7%
- Decided: 5%

Bloc (QC only) — 21%
- Non: 65%
- Undecided: 14%
- Second choice: 4%
- Soft: 7%
- Decided: 10%

Green — 17%
- Non: 71%
- Undecided: 12%
- Second choice: 8%
- Soft: 5%
- Decided: 4%

People's Party — 6%
- Non: 82%
- Undecided: 12%
- Second choice: 2%
- Soft: 2%

Legend: ■ Decided ■ Soft ■ Second choice ■ Undecided ■ Non

Decided: Voting for the party, and have heard all they need to make up their mind
Soft: Voting for the party, but would like to hear more before making up their mind
Second Choice: The party is second choice, and they would like to hear more before making up their mind
Undecided: Undecided voters
Non-party: Voting for another party and second choice is not for the party, or they have made up their mind

INNOVATIVE
RESEARCH GROUP

Party ID

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

Q Thinking about politics in Canada, generally speaking, do you think of yourself as a...
[asked of all respondents; n=2,000]

Rest of Canada

n=1533

Quebec
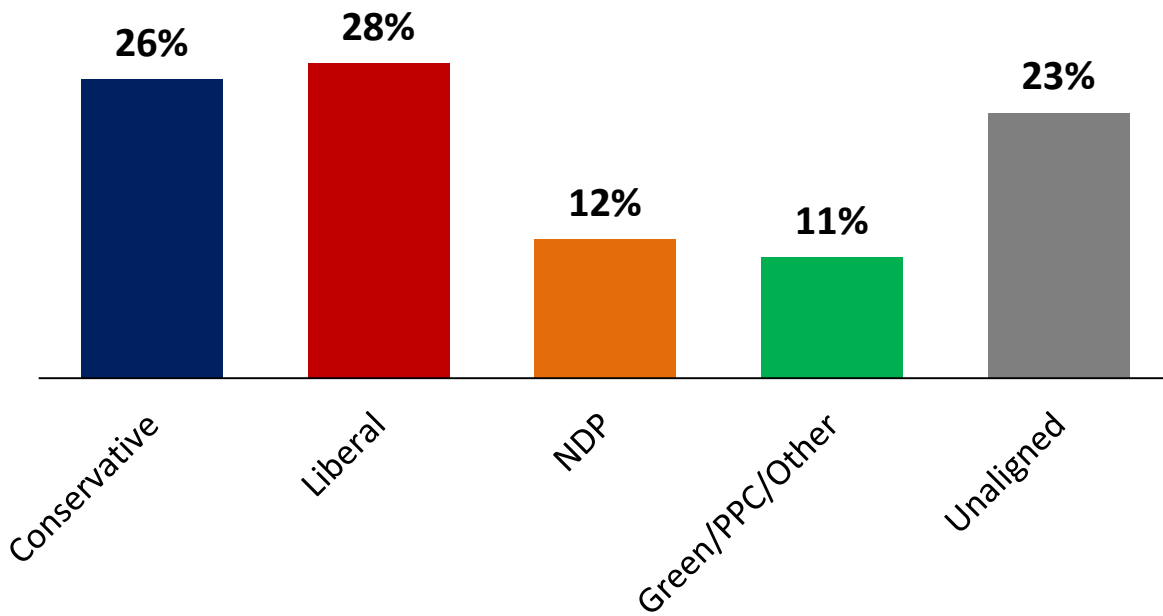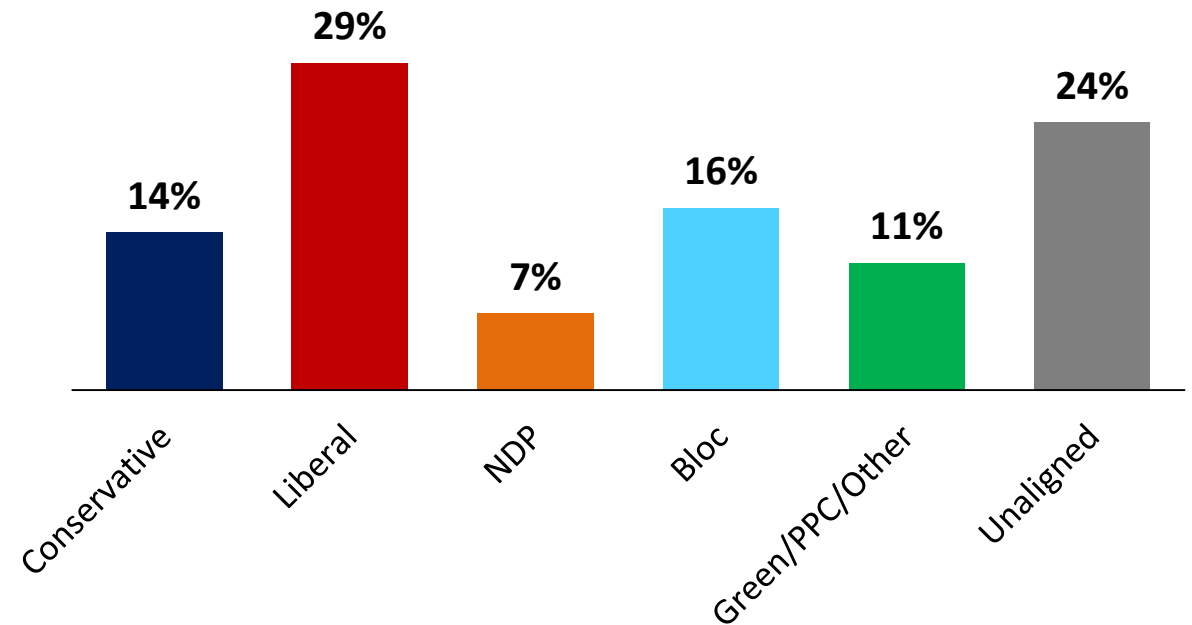
n=467

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

Q Thinking about politics in Canada, generally speaking, do you think of yourself as a…
[asked of all respondents; n=2,000]

Legend: Conservative | Liberal | NDP | Other | Unaligned

Values shown: 28%, 23%, 14%, 11%
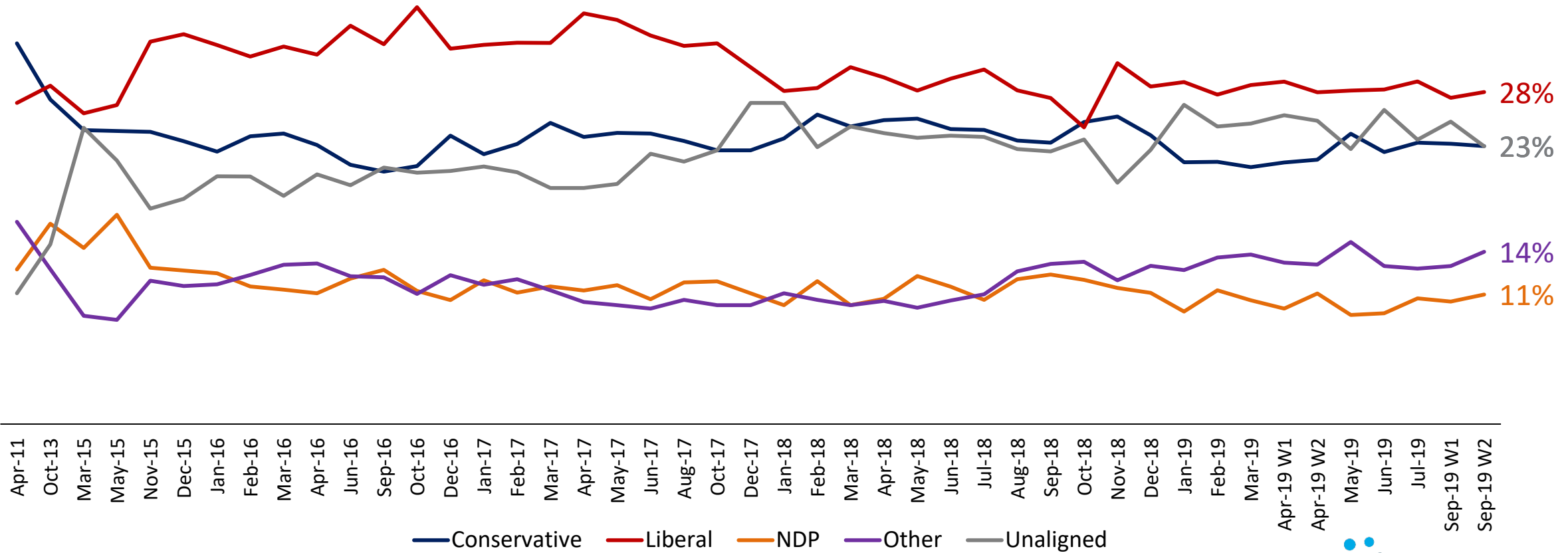
Turnout

Election Voting: Two-thirds (66%) of voters say they have voted in every election in the last ten years

Q Thinking about the last ten years in Canada, were there any federal, provincial, or municipal elections in which you were eligible to vote but did not?
[asked of all respondents; n=2,000]

I voted in every election	I voted in most elections	I voted in only a few elections	I haven't voted in the last ten years	Can't recall
65%	16%	8%	8%	4%

INNOVATIVE
RESEARCH GROUP
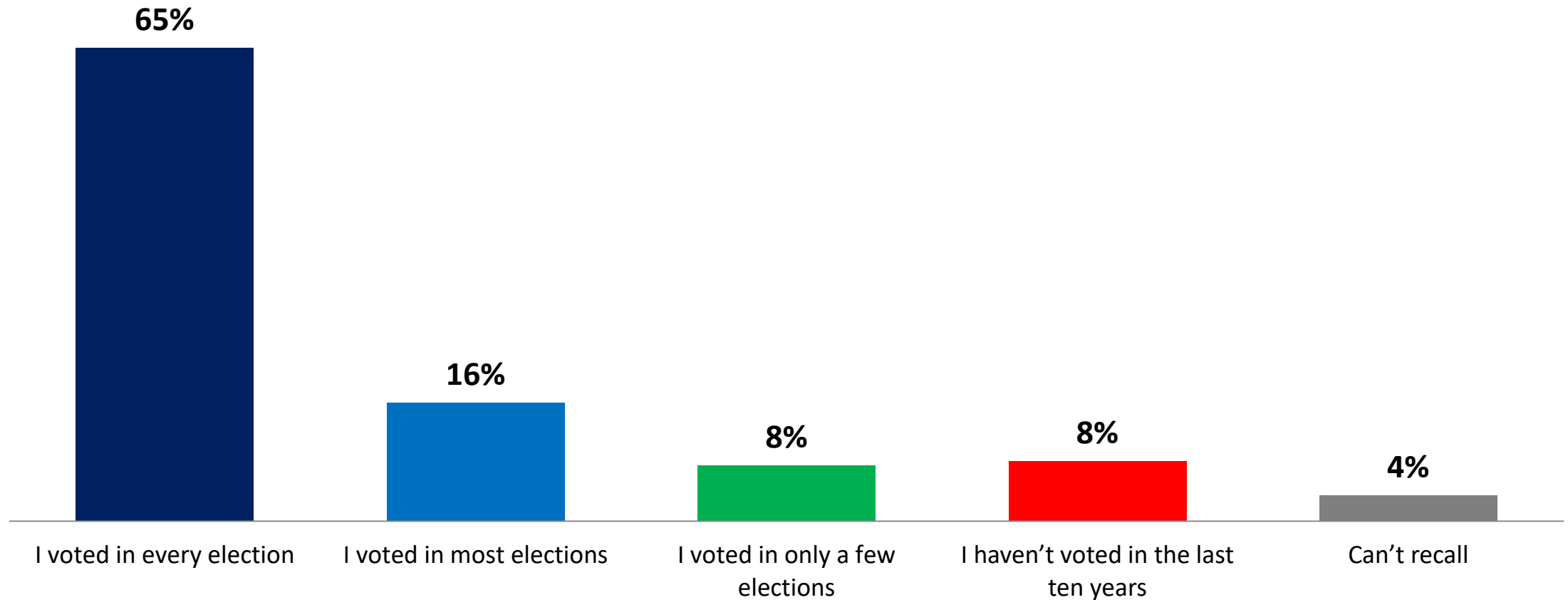
Current Vote by Past Behaviour: Liberals hold a small directional lead among the most likely voters

Q Combined vote by: Thinking about the last ten years in Canada, were there any federal, provincial, or municipal elections in which you were eligible to vote but did not?

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

	Conservative	Liberal	NDP	Bloc	Green	Peoples Party	Other	Undecided DK	Would not vote None
Total	27%	31%	12%	4%	9%	4%	1%	9%	3%
I voted in every election	31%	34%	11%	5%	8%	4%	1%	6%	0%
I voted in most elections	27%	29%	15%	4%	11%	5%	0%	7%	1%
I voted in only a few elections	17%	24%	20%	6%	13%	7%	0%	9%	4%
I haven't voted in the last ten years	11%	23%	9%	0%	9%	6%	0%	24%	18%
Can't recall	7%	19%	11%	0%	5%	3%	0%	39%	16%

Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc ■ Green ■ Peoples Party ■ Other ■ Undecided DK ■ Would not vote None

INNOVATIVE RESEARCH GROUP
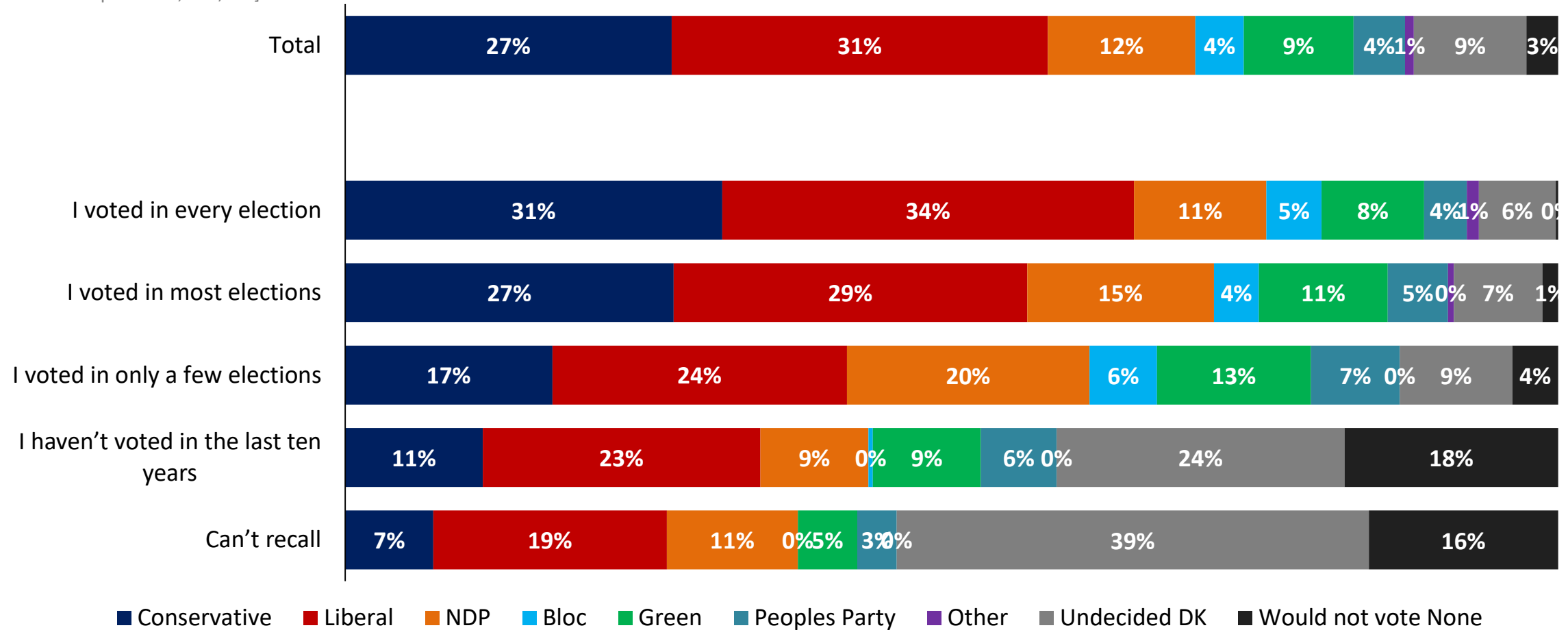
Combined Vote by Voting: Among those who think voting is a duty, respondents are split between the Liberals (32%) and the CPC (29%)

Q Combined Vote by: For you personally, is voting FIRST and FOREMOST a…
[asked of all respondents; n=1,600]

Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc Quebecois ■ Green ■ PPC ■ Other ■ Undecided ■ Would not vote

Duty

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	29%	32%	13%	5%	10%	3%	0%	7%	1%
2016	29%	33%	22%	6%	4%	1%	0%	5%	0%

Don't Know

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	14%	14%	11%	1%	7%	3%	0%	33%	18%
2016	14%	16%	11%	2%	6%		1%	31%	19%

Choice

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	27%	29%	11%	3%	9%	3%	0%	13%	5%
2016	24%	30%	22%	3%	4%		2%	11%	4%
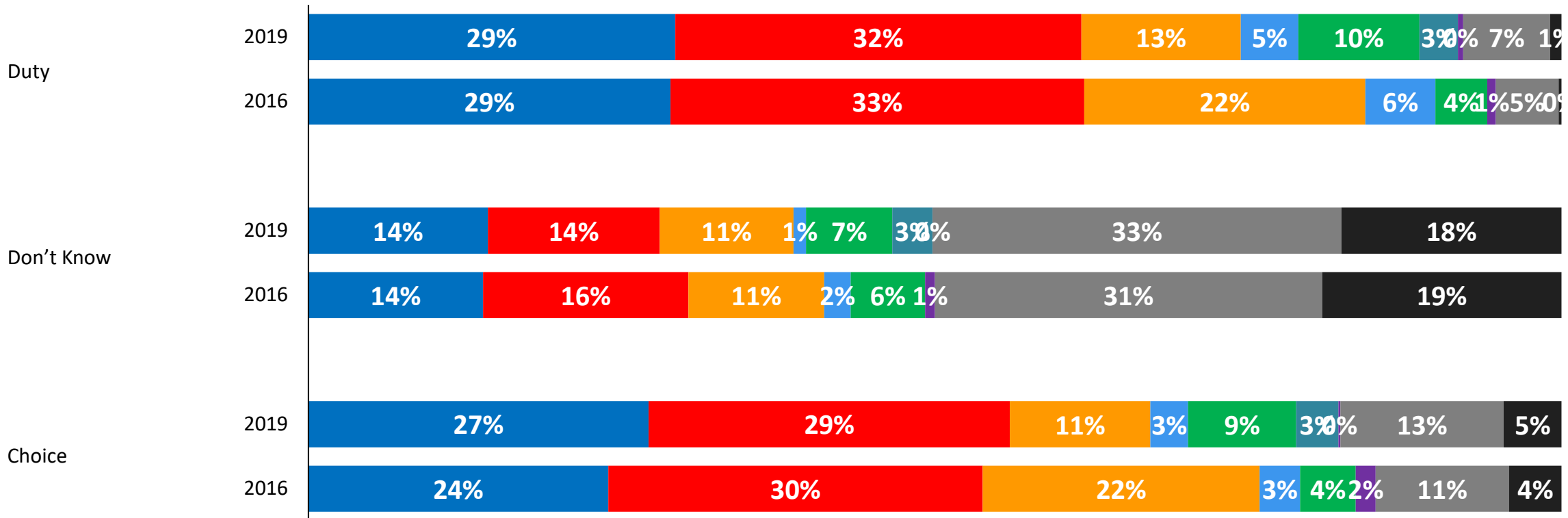
Note: Value not asked in October 2016; October 2015 tracking shown.

INNOVATIVE
RESEARCH GROUP

Counting Seats, Not Votes

Overview

In Canada, we count seats, not votes. Just like in American Presidential elections, you can win the popular vote and lose the election. In fact, that happened to Justin Trudeau's father in 1979.

The general way analysts address that is to look at seats by region. However, seats in the same region can move differently. This release tries to get closer to reality in the seat-by-seat contest. Our analysis combines two projects:

- An analysis of federal election districts (which we call "seats") that groups them into 14 clusters based on which parties are most competitive in those seats. Given the shifting dynamics of Canada's party system, we have relied on only the results of the past two elections. However, to assess where the parties stand in these 14 seat clusters, we need a lot of data.

- A merge of the most recent three national surveys that include federal votes, creating a unweighted total of 6,420 respondents and a weighted total of 5,900.

In each of our surveys, we collect postal codes. That allows us to create a riding variable for almost all our respondents and to group their responses by the riding they are in.

The deck below shows the output from the analysis.

The Seat Clusters

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

For this analysis, we have grouped seats together into **clusters** where ridings are similar to one another according to which parties have historically been successful there in addition to the region where the seat is located.

These seat clusters can help us better understand changes in support for parties in ridings which have typically had similar voting behaviour. Each of these clusters is listed along with the pooled sample size of respondents from each cluster.

The core analysis that drives the groups is based on classifying ridings as:

- **Stronghold**: A seat won by a party in *both* 2011 and 2015 by >10%

- **Competitive**: A seat won in either 2011 or 2015 by the party OR lost by an average of less than 10% across *both* elections (a seat can be competitive for multiple parties)

- **Two-way races** (e.g. LPC-CPC): Seats that are competitive for both listed parties, but for *no other* parties.

See the Appendix for detailed definitions of each cluster and which ridings they contain.

Seat Clusters	Seats	Weighted Sample Size
Strong CPC	65	1,069
Strong LPC	32	492
LPC-CPC GTA	33	579
LPC-CPC Rest of Ontario	34	568
LPC-CPC Lower mainland	11	181
LPC-CPC Atlantic	14	150
Other LPC-CPC	19	277
LPC-NDP Quebec	27	444
LPC-NDP RoC	26	434
NDP Strong/Swing QC	14	250
NDP Strong/Swing RoC	16	233
BQ Competitive	18	275
Green target	15	257
2015 3-Way	14	250

INNOVATIVE
RESEARCH GROUP

Strong LPC: Liberals down 15 points in these core seats compared to 2015 while CPC is up 6
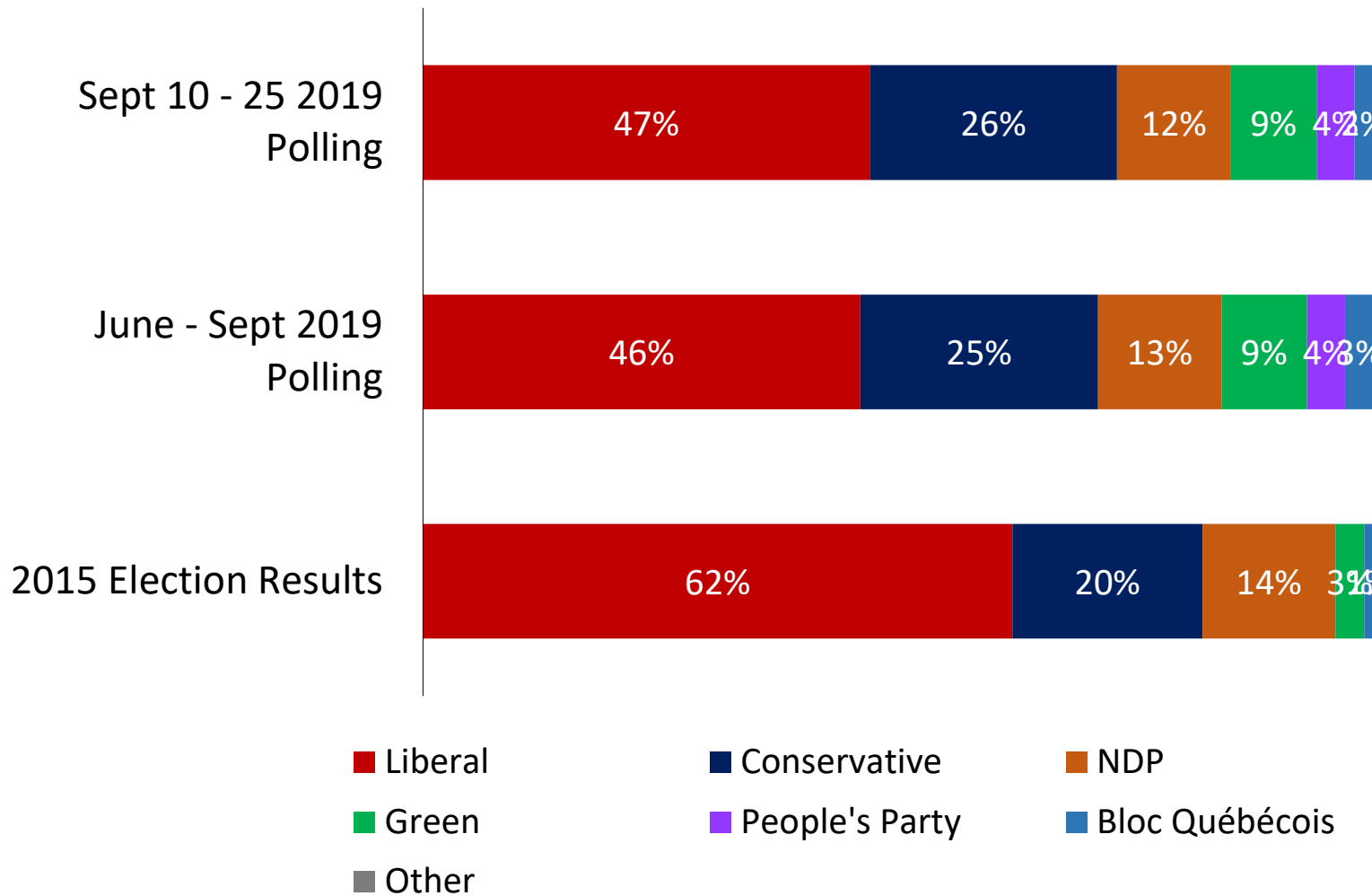
The strongest LPC seats that they held onto even in the tough 2011 campaign. These seats are their core base.

Sept 10 - 25 2019 Polling

| Liberal 47% | Conservative 26% | NDP 12% | Green 9% | People's Party 4% | Bloc 2% |

June - Sept 2019 Polling

| Liberal 46% | Conservative 25% | NDP 13% | Green 9% | People's Party 4% | Bloc 3% |

2015 Election Results

| Liberal 62% | Conservative 20% | NDP 14% | Green 3% | 1% |

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	32	32
CPC	0	0
NDP	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE
RESEARCH GROUP

LPC-NDP Quebec: The Liberals are holding their 2015 vote while the NDP is struggling. The Liberals appear poised to hold these 26 gains from the 2015 campaign.

Sept 10 - 25 2019 Polling

Liberal	Conservative	NDP	Green	People's Party	Bloc Québécois
43%	20%	9%	8%	3%	18%

June - Sept 2019 Polling

Liberal	Conservative	NDP	Green	People's Party	Bloc Québécois
44%	17%	10%	12%	3%	15%

2015 Election Results

Liberal	Conservative	NDP	Green	Bloc Québécois
44%	13%	24%	2%	17%

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other
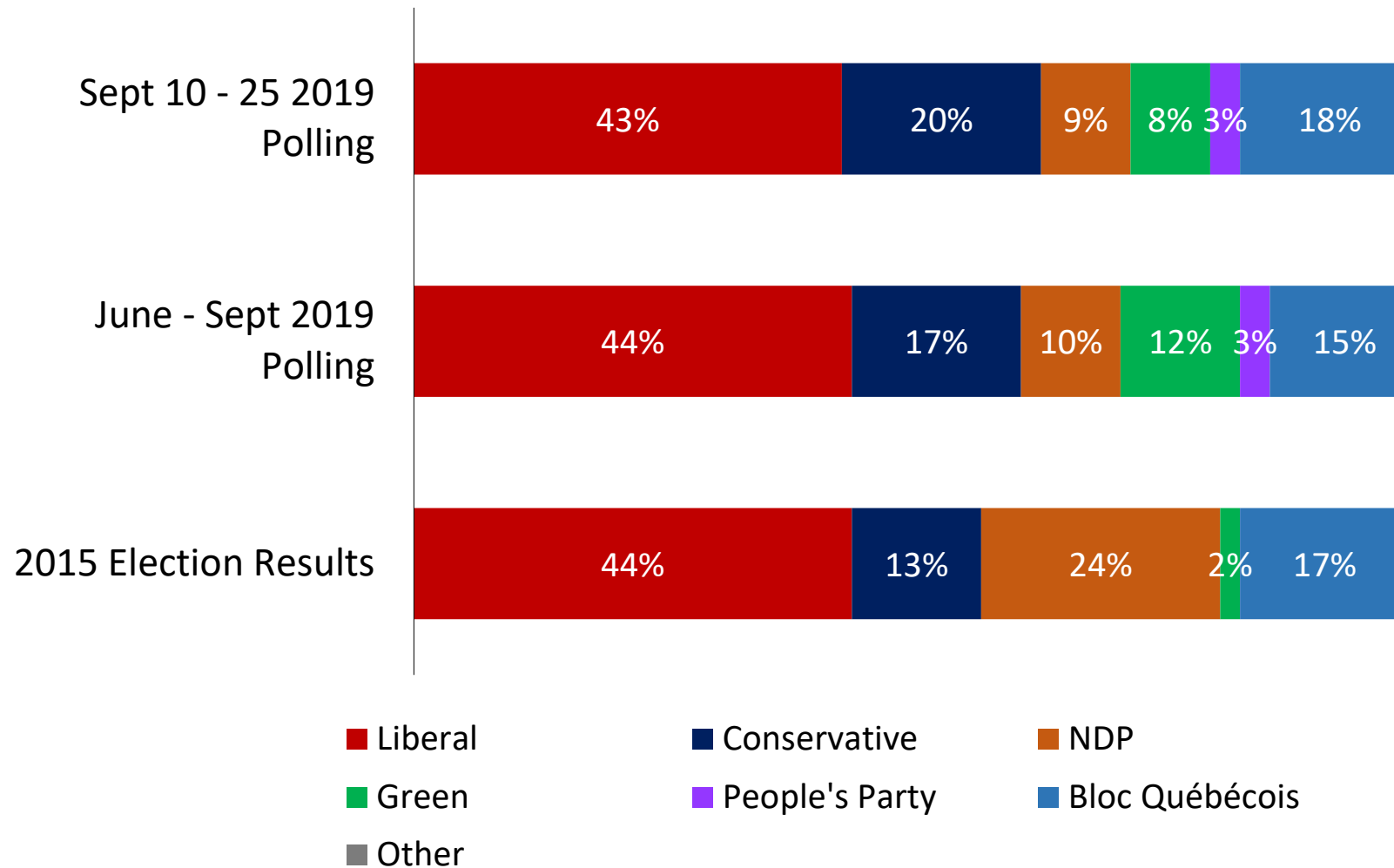
Seats historically competitive between the Liberals and NDP in Quebec.

Party	Seats Won 2015	Seats Won 2011*
Liberal	26	0
CPC	0	0
NDP	0	26

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE
RESEARCH GROUP

LPC-NDP Rest of Canada: Conservatives and Greens may be benefiting from some of the NDP decline in these seats, but the Liberals still look strong in this cluster.

Seats historically competitive between the NDP and Liberals outside of Quebec.

Sept 10 - 25 2019 Polling

Liberal	Conservative	NDP	Green	People's Party
43%	21%	21%	11%	3%

June - Sept 2019 Polling

Liberal	Conservative	NDP	Green	People's Party
43%	25%	18%	12%	2%

2015 Election Results

Liberal	Conservative	NDP	Green
49%	16%	32%	3%

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other
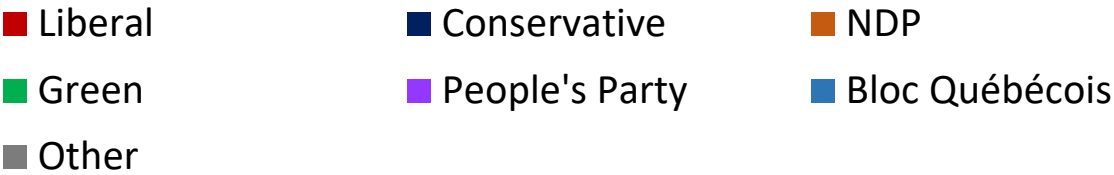
Party	Seats Won 2015	Seats Won 2011*
Liberal	26	1
CPC	0	0
NDP	0	26

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

Quebec NDP Strong/Swing: The NDP vote down to 13% in these 14 seats; with all other parties rising since 2015. The Liberals may stand to gain the most but will be in tight races with both Tories and Bloc.

Sept 10 - 25 2019 Polling
- Liberal 31%
- Conservative 17%
- NDP 13%
- Green 11%
- People's Party 3%
- Bloc Québécois 23%
- Other 1%

June - Sept 2019 Polling
- Liberal 30%
- Conservative 20%
- NDP 11%
- Green 10%
- People's Party 4%
- Bloc Québécois 26%

2015 Election Results
- Liberal 27%
- Conservative 13%
- NDP 36%
- Green 2%
- Bloc Québécois 21%
- Other 1%
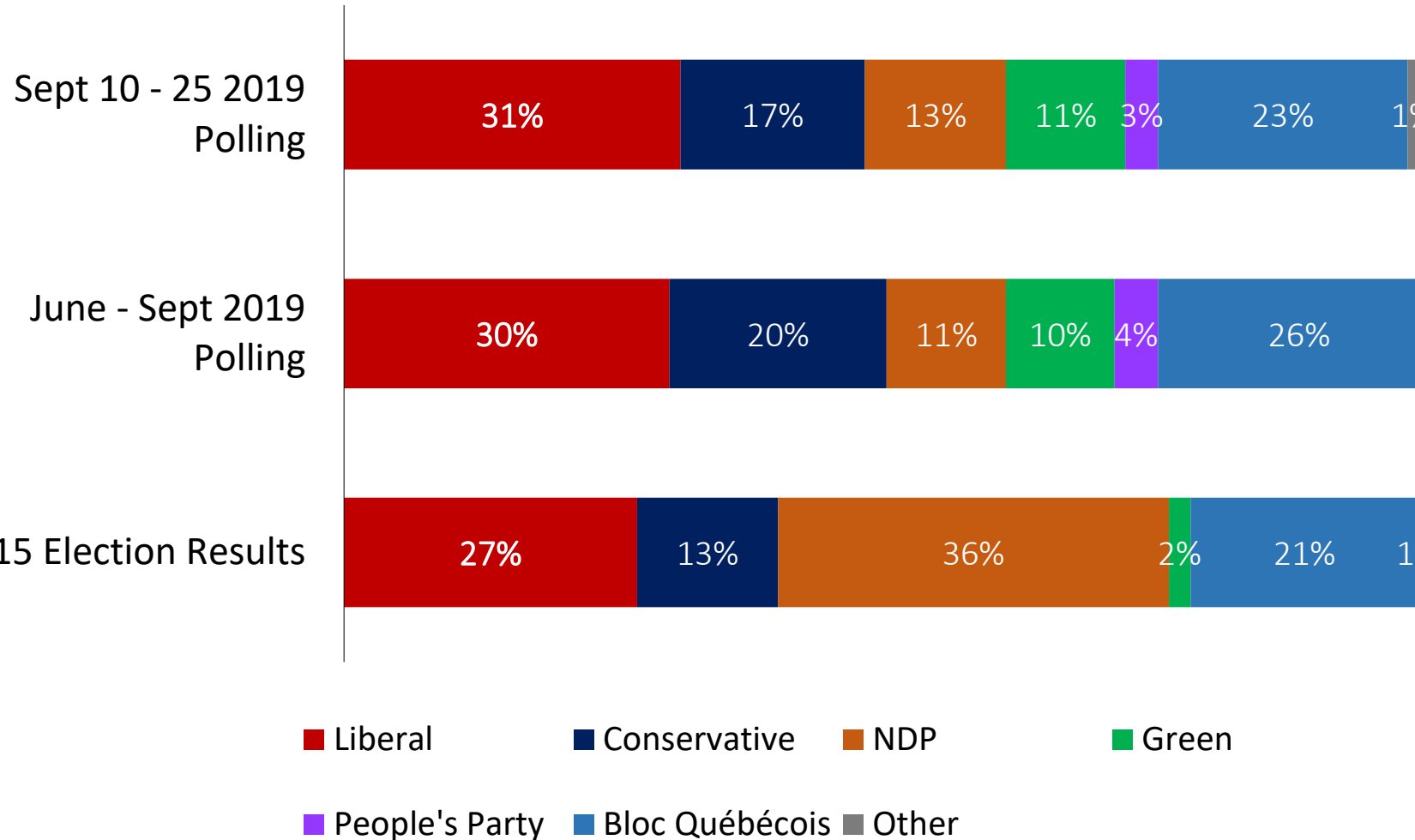
The strongest NDP seats in Quebec grouped with some in which they were competitive against the Conservatives or Bloc.

Party	Seats Won 2015	Seats Won 2011*
Liberal	0	0
CPC	1	1
NDP	13	13

Legend: Liberal, Conservative, NDP, Green, People's Party, Bloc Québécois, Other

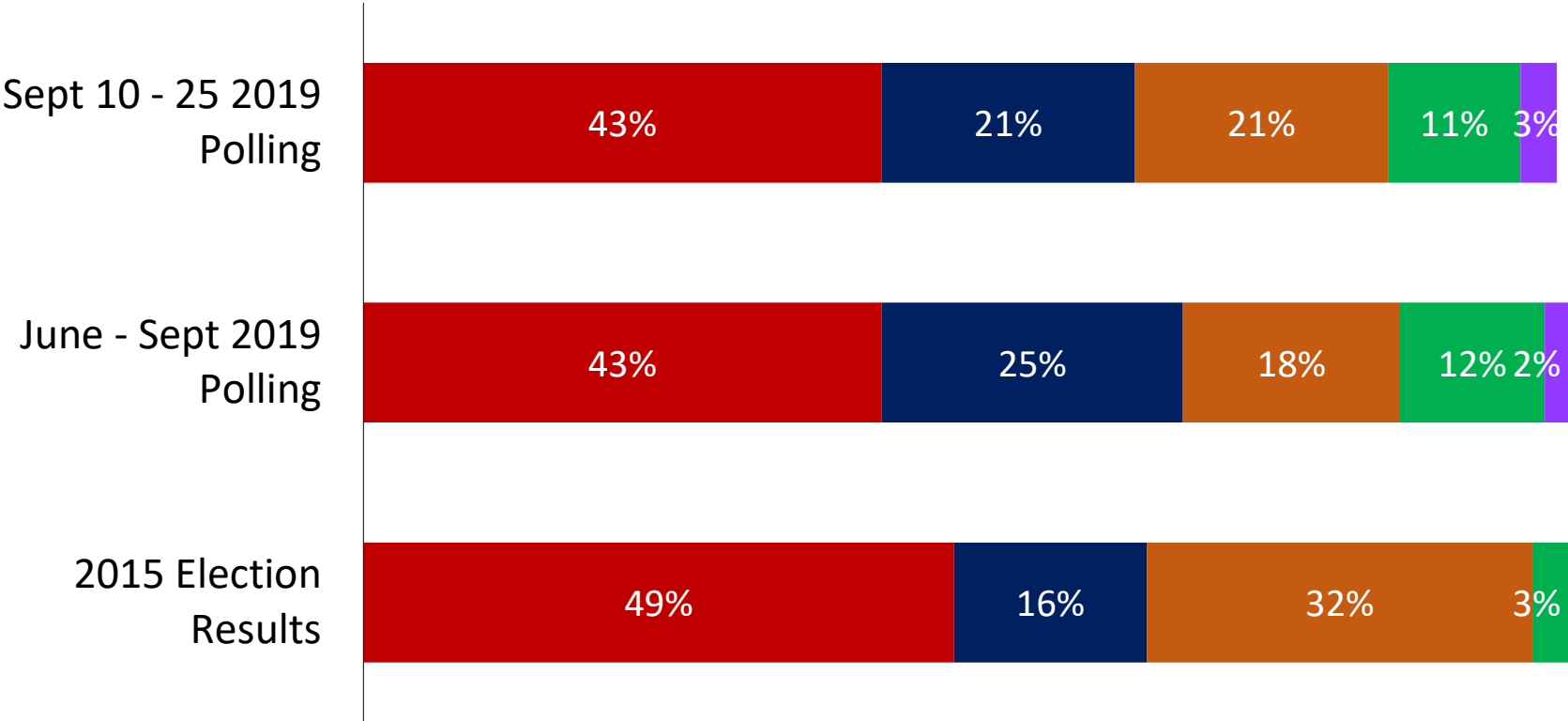*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

LPC-CPC Toronto & GTA: Both Liberals and Tories have dipped slightly compared to 2015 with Liberals maintaining their lead (9% in Sept); NDP, Greens, and PPC all up

Sept 10 - 25 2019 Polling
Liberal	Conservative	NDP	Green	People's Party
44%	35%	10%	8%	5%

June - Sept 2019 Polling
Liberal	Conservative	NDP	Green	People's Party
41%	35%	12%	7%	4%

2015 Election Results
Liberal	Conservative	NDP	Green	Other
49%	39%	9%	2%	

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other
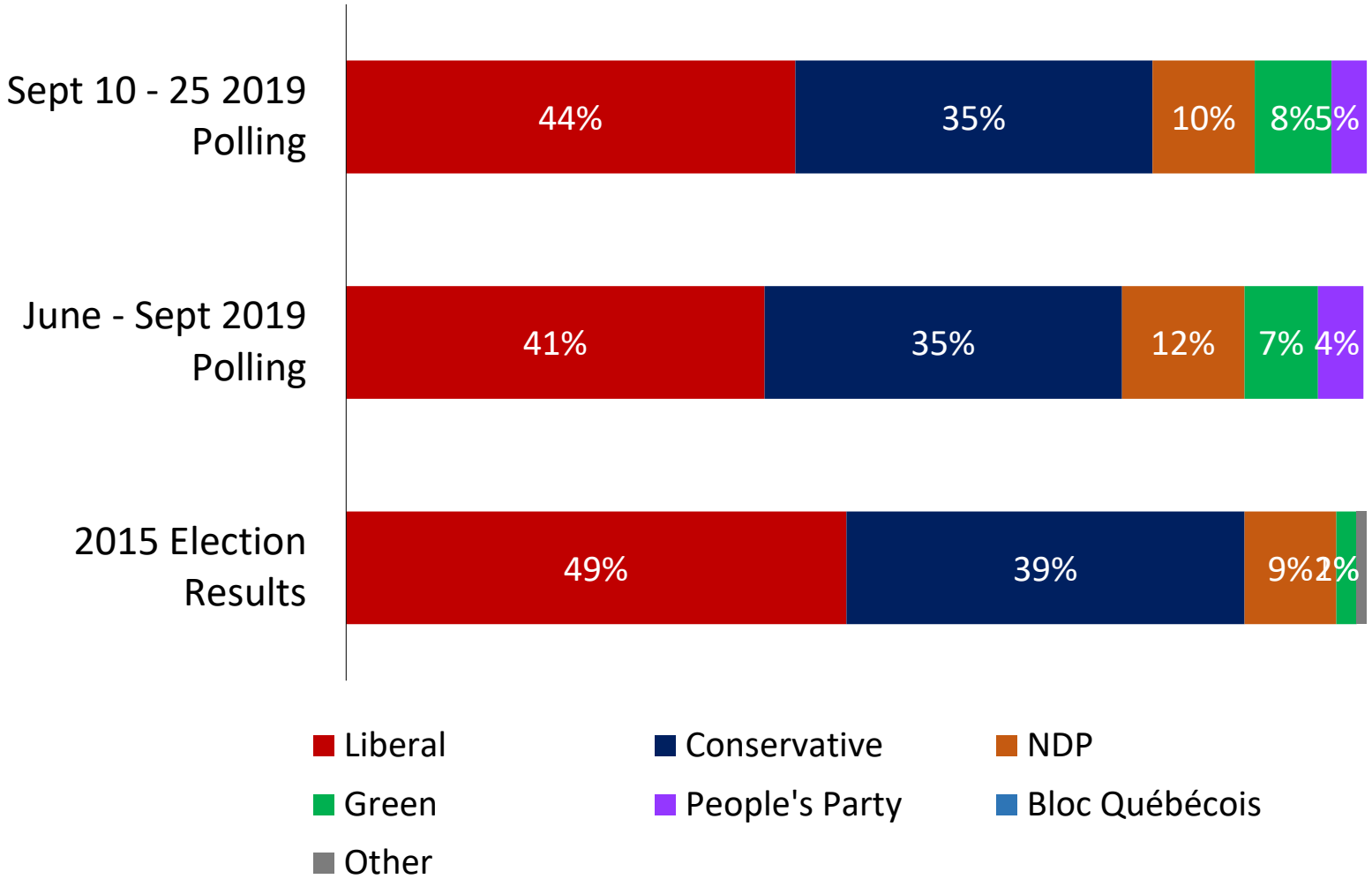
Races that have been historically close between the Liberals and Conservatives in Toronto and the GTA.

Party	Seats Won 2015	Seats Won 2011*
Liberal	30	0
CPC	3	33
NDP	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE
RESEARCH GROUP

LPC-CPC Rest of Ontario: In two-way races outside the GTA both Liberals and Tories are down and neck-and-neck. Greens up 9% since the 2015 election in these seats.
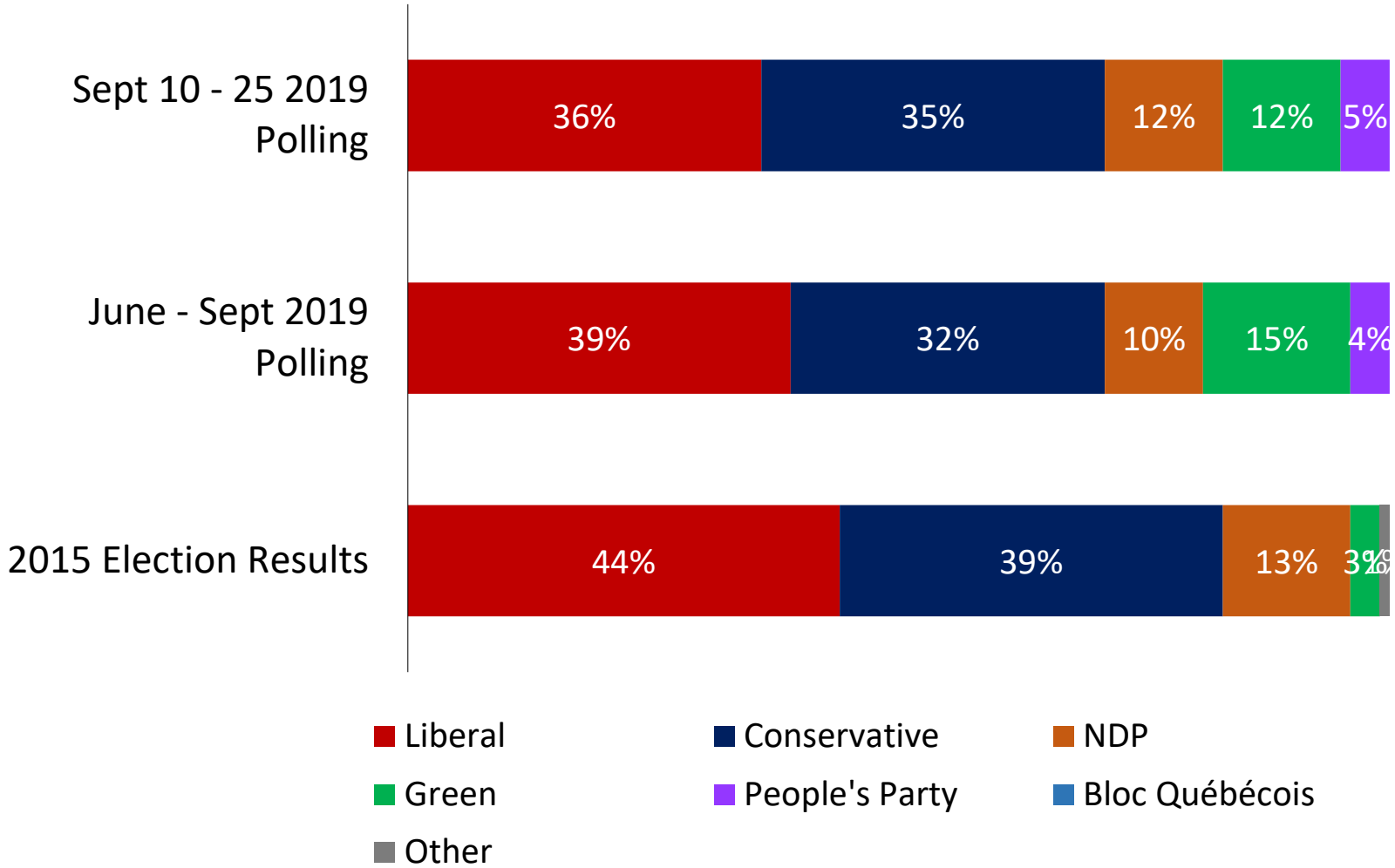
Races that have been historically close between the Liberals and Conservatives in Ontario outside of the GTA.

Sept 10 - 25 2019 Polling
- Liberal: 36%
- Conservative: 35%
- NDP: 12%
- Green: 12%
- People's Party: 5%

June - Sept 2019 Polling
- Liberal: 39%
- Conservative: 32%
- NDP: 10%
- Green: 15%
- People's Party: 4%

2015 Election Results
- Liberal: 44%
- Conservative: 39%
- NDP: 13%
- Green: 3%
- Other: 1%

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	18	0
CPC	16	34
NDP	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

LPC-CPC Atlantic: After flipping all 14 of these seats with a 27-point margin in 2015, the Liberals are neck-and-neck with the Tories in this key battleground.
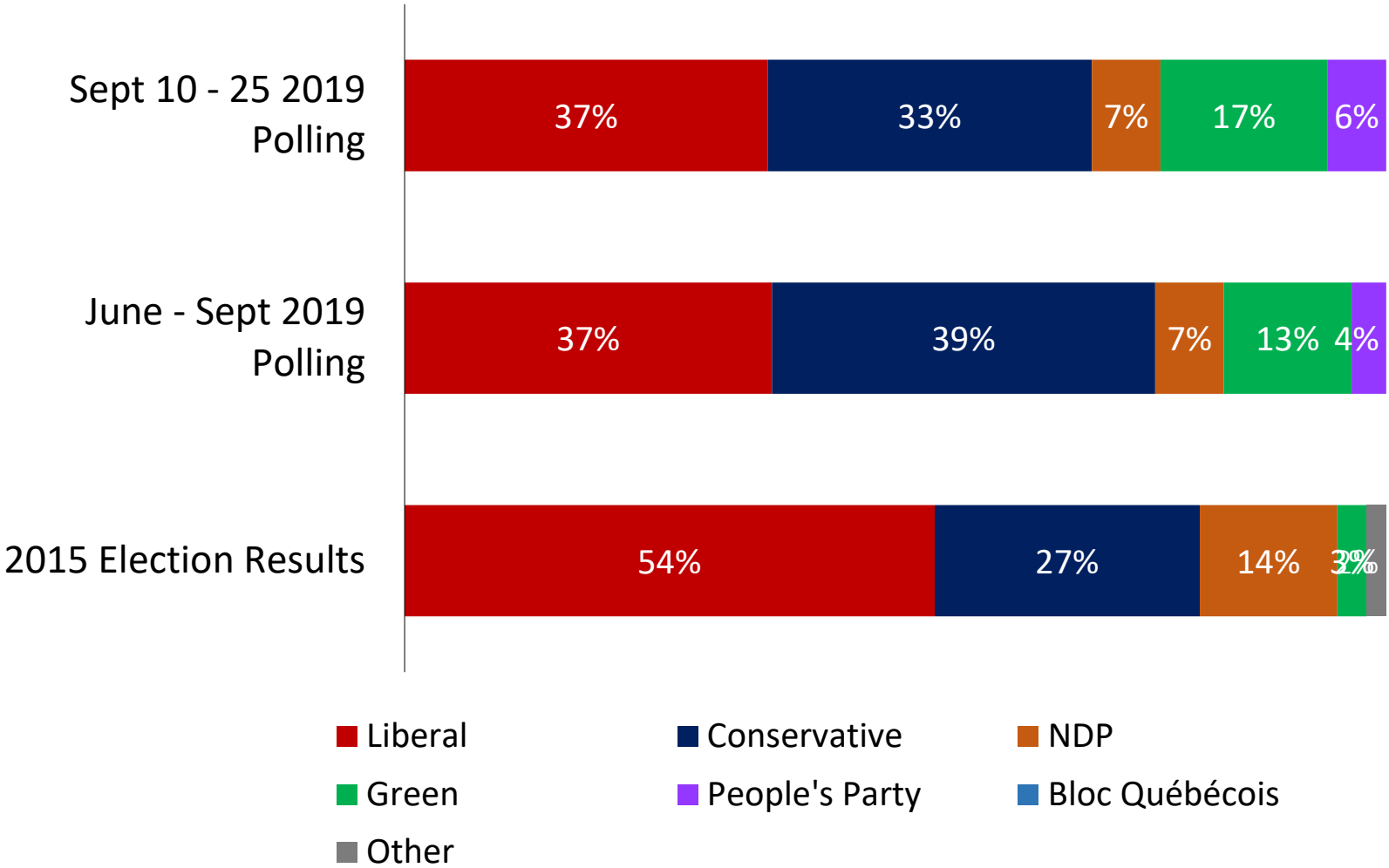
Seats historically competitive for both Liberals and Conservatives in Atlantic Canada.

Sept 10 - 25 2019 Polling
- Liberal: 37%
- Conservative: 33%
- NDP: 7%
- Green: 17%
- People's Party: 6%

June - Sept 2019 Polling
- Liberal: 37%
- Conservative: 39%
- NDP: 7%
- Green: 13%
- People's Party: 4%

2015 Election Results
- Liberal: 54%
- Conservative: 27%
- NDP: 14%
- Green: 2%
- Other: 2%

Party	Seats Won 2015	Seats Won 2011*
Liberal	14	0
CPC	0	14
NDP	0	0

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

LPC-CPC Lower Mainland: The Liberals had a margin of 6-points in 2015 and picked up 7 of these seats. So far in 2019 the CPC has taken the lead by a margin of 7-points; Greens gain popularity
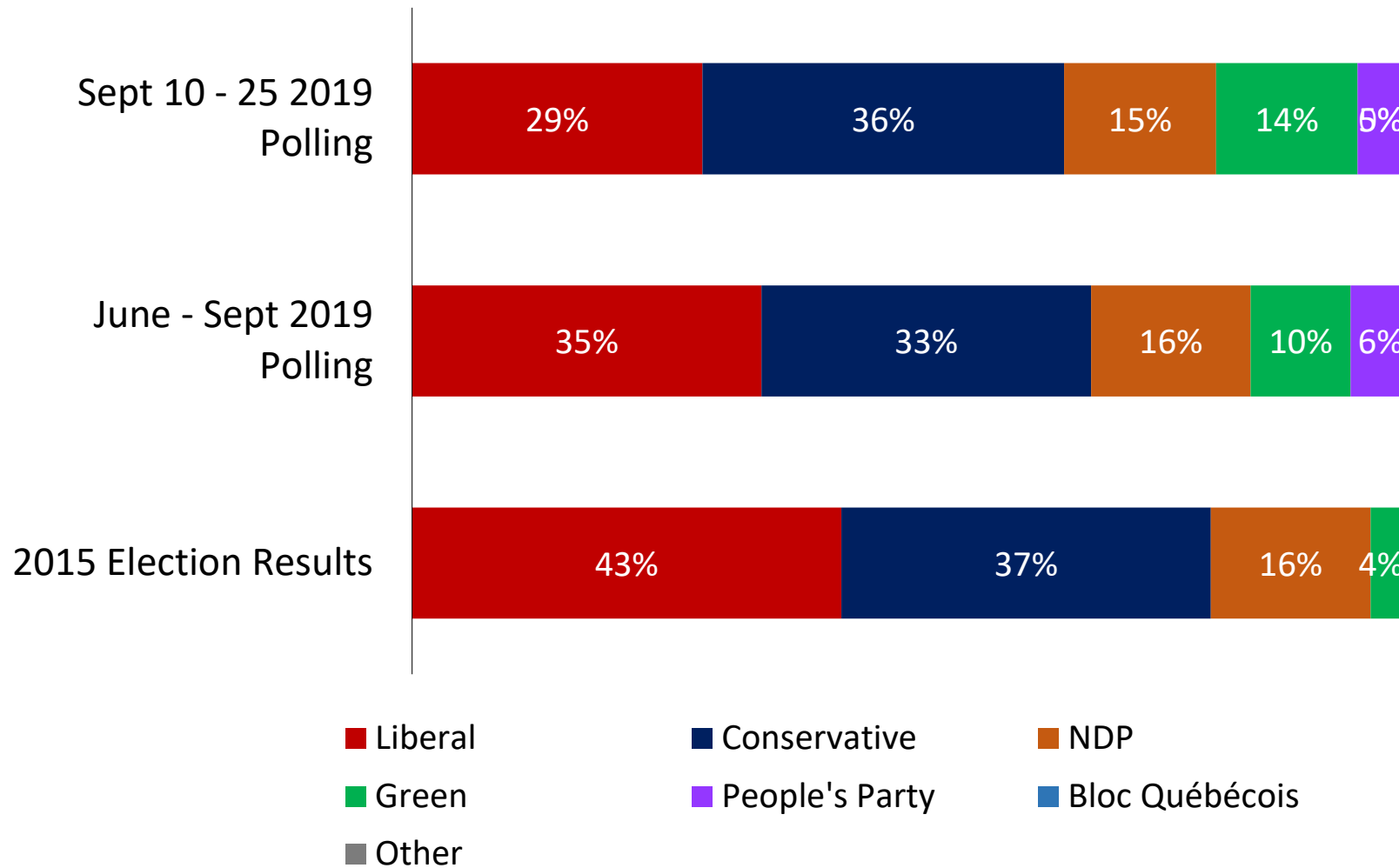
Seats historically competitive for both Liberals and Conservatives in BC's Lower Mainland.

Sept 10 - 25 2019 Polling
- Liberal: 29%
- Conservative: 36%
- NDP: 15%
- Green: 14%
- People's Party: 6%

June - Sept 2019 Polling
- Liberal: 35%
- Conservative: 33%
- NDP: 16%
- Green: 10%
- People's Party: 6%

2015 Election Results
- Liberal: 43%
- Conservative: 37%
- NDP: 16%
- Green: 4%

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	7	0
CPC	4	11
NDP	0	0

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

Other LPC-CPC: After winning this cluster by 6-points in 2015 and picking up 12 seats, the Liberals are now slightly behind the CPC and could experience losses here.
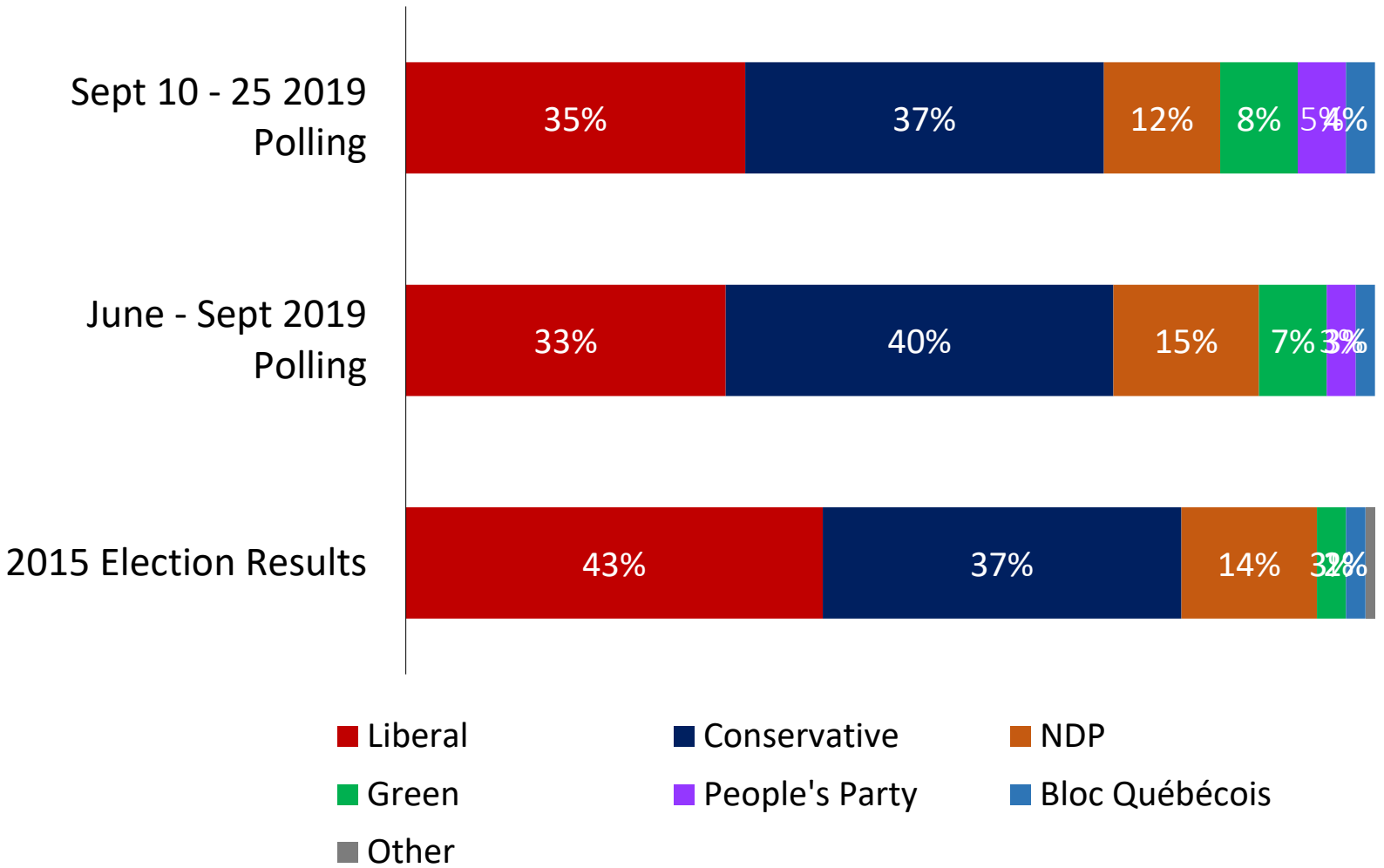
Liberal vs. Tory races in the rest of the country. Three of these are in Quebec, five in BC's Interior or North, and eleven in the Prairies or Alberta

Sept 10 - 25 2019 Polling
- Liberal: 35%
- Conservative: 37%
- NDP: 12%
- Green: 8%
- People's Party: 5%
- Bloc Québécois: 4%

June - Sept 2019 Polling
- Liberal: 33%
- Conservative: 40%
- NDP: 15%
- Green: 7%
- People's Party: 3%

2015 Election Results
- Liberal: 43%
- Conservative: 37%
- NDP: 14%
- Green: 3%
- Bloc Québécois: 2%

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	13	1
CPC	6	17
NDP	0	1

INNOVATIVE
RESEARCH GROUP

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

Strong CPC: Conservatives are holding on to most of their 2015 support in their safest seats
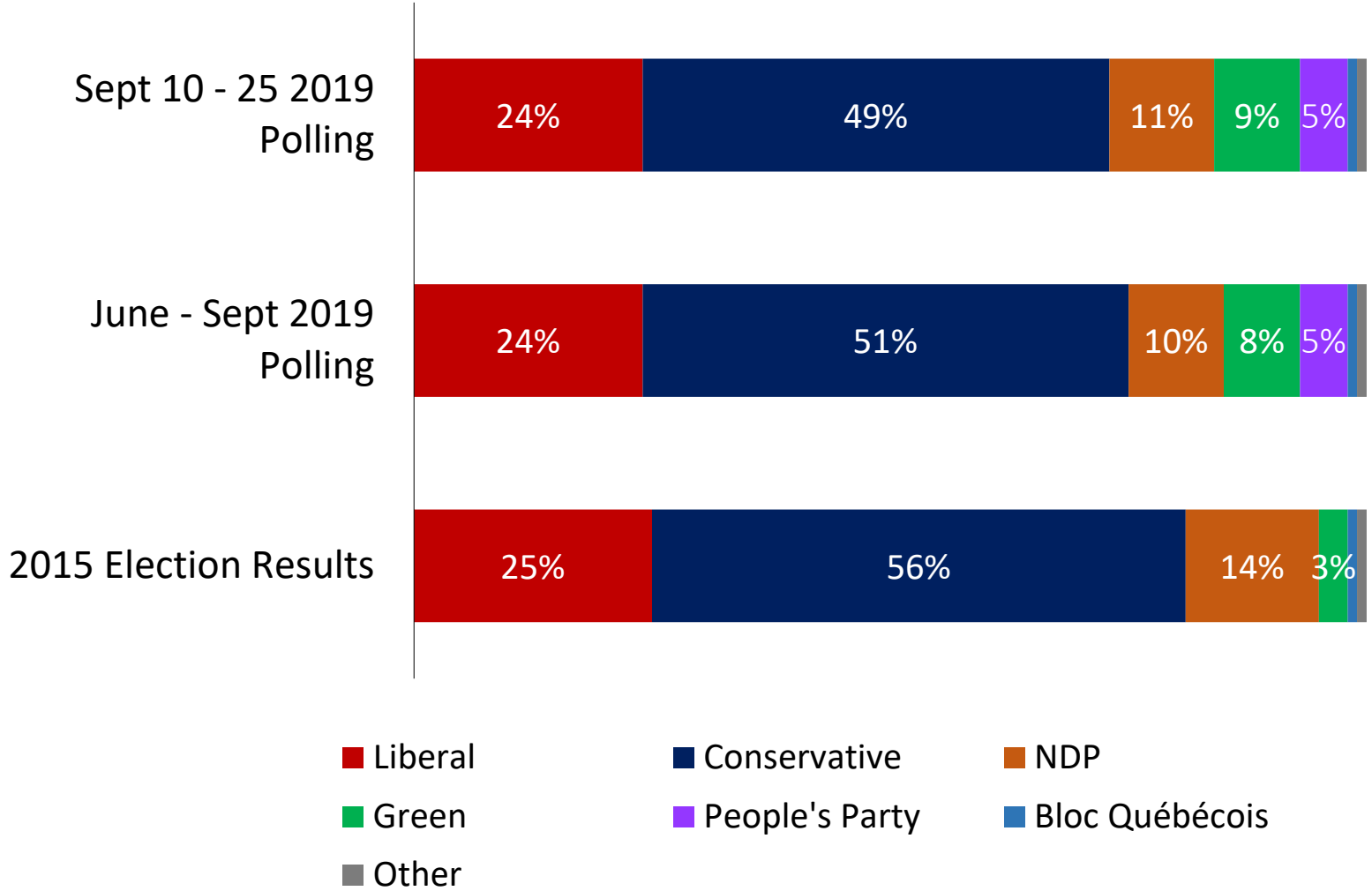
The strongest Conservative seats across the last two elections. These seats are unlikely to flip in the 2019 campaign.

Sept 10 - 25 2019 Polling
- Liberal: 24%
- Conservative: 49%
- NDP: 11%
- Green: 9%
- People's Party: 5%

June - Sept 2019 Polling
- Liberal: 24%
- Conservative: 51%
- NDP: 10%
- Green: 8%
- People's Party: 5%

2015 Election Results
- Liberal: 25%
- Conservative: 56%
- NDP: 14%
- Green: 3%

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	0	0
CPC	65	62
NDP	0	3

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

2015 3-Way: A 17-point loss for the NDP since 2015 makes way to a 8-point rise in Green popularity; Liberals and CPC remain neck-in-neck.
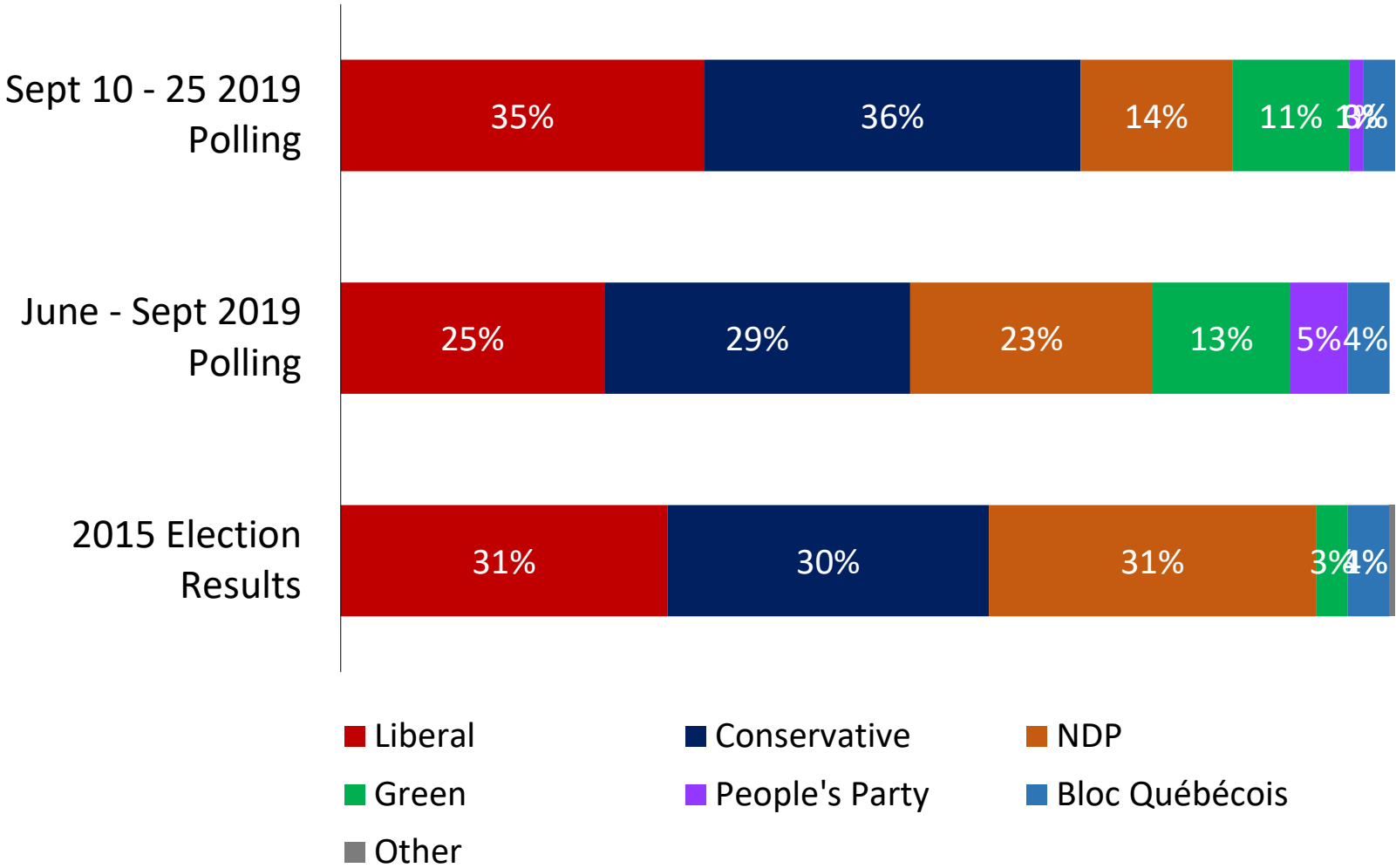
Seats that were 3-way races in the 2015 election campaign.

Sept 10 - 25 2019 Polling
- Liberal: 35%
- Conservative: 36%
- NDP: 14%
- Green: 11%
- People's Party: 1%
- Bloc Québécois: 3%

June - Sept 2019 Polling
- Liberal: 25%
- Conservative: 29%
- NDP: 23%
- Green: 13%
- People's Party: 5%
- Bloc Québécois: 4%

2015 Election Results
- Liberal: 31%
- Conservative: 30%
- NDP: 31%
- Green: 3%
- Bloc Québécois: 4%

Legend: Liberal | Conservative | NDP | Green | People's Party | Bloc Québécois | Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	6	0
CPC	3	9
NDP	5	5

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

NDP Strong/Swing Rest of Canada: Liberals, Tories, and Greens show little change since 2015 with the NDP down 8 points. NDP only 5-6 points ahead of Liberals and Tories.
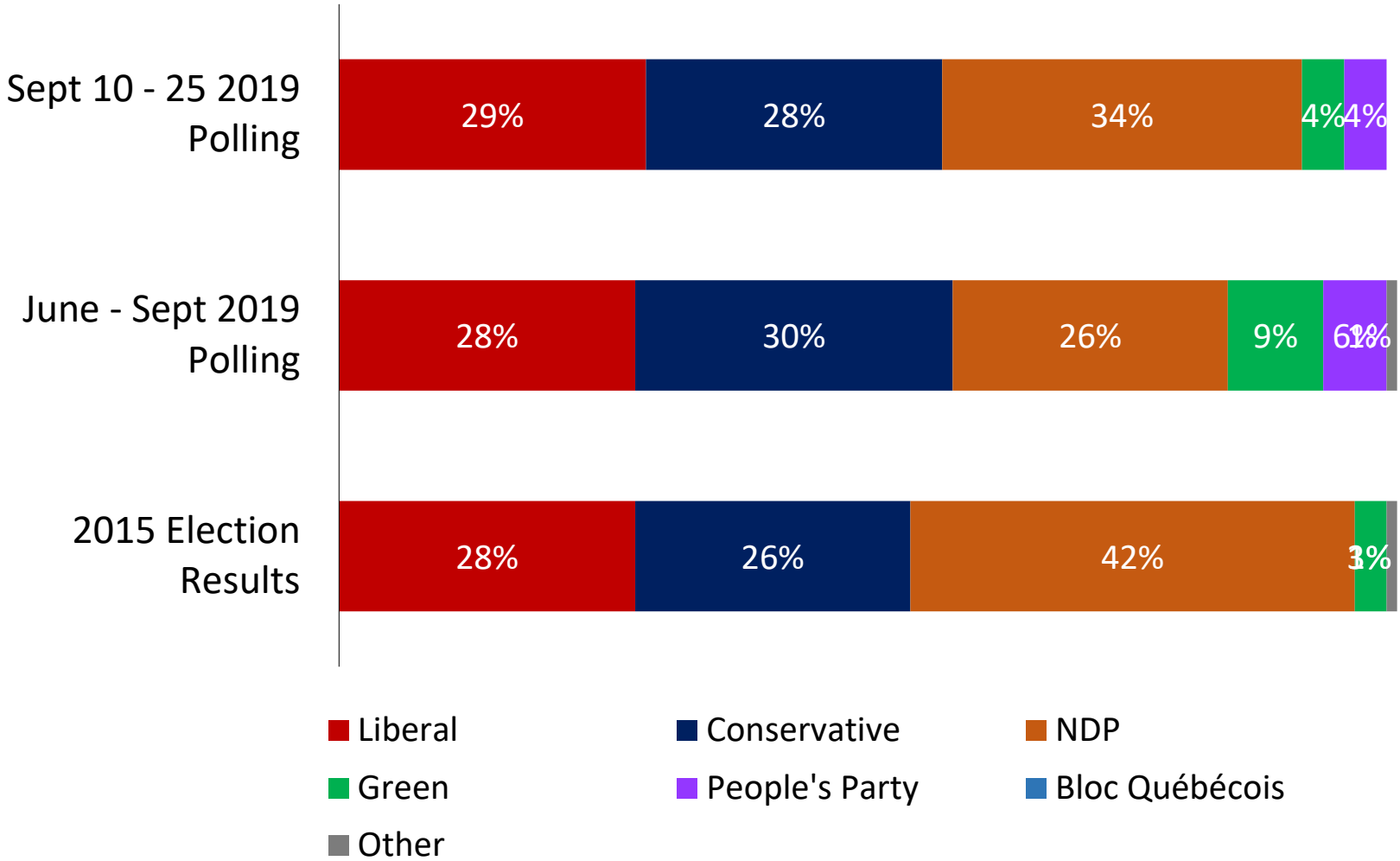
The strongest NDP seats outside of Quebec grouped with some in which they were competitive against the Conservatives.

Sept 10 - 25 2019 Polling
- Liberal: 29%
- Conservative: 28%
- NDP: 34%
- Green: 4%
- People's Party: 4%

June - Sept 2019 Polling
- Liberal: 28%
- Conservative: 30%
- NDP: 26%
- Green: 9%
- People's Party: 6%
- Other: 1%

2015 Election Results
- Liberal: 28%
- Conservative: 26%
- NDP: 42%
- Green: 3%

Legend:
- Liberal
- Conservative
- NDP
- Green
- People's Party
- Bloc Québécois
- Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	0	0
CPC	0	2
NDP	16	14

INNOVATIVE RESEARCH GROUP

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

BQ Competitive: With the NDP down 22 points and the Bloc steady, the Bloc and Liberals appear to be in a tight race in this seat cluster.
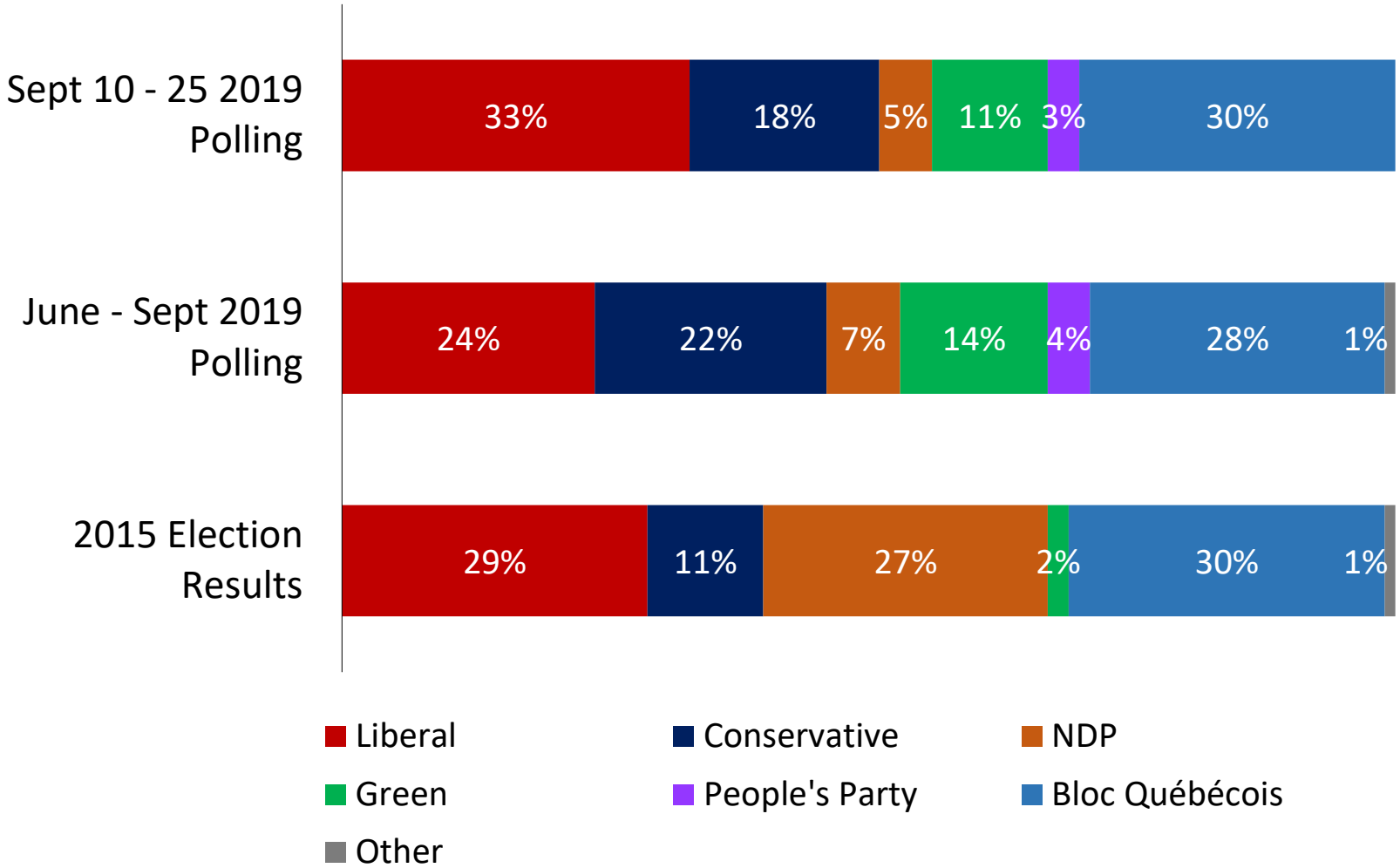
Seats where the Bloc has been competitive in 2011 and 2015, excluding some that fall into other clusters.

Sept 10 - 25 2019 Polling

| 33% | 18% | 5% | 11% | 3% | 30% |

June - Sept 2019 Polling

| 24% | 22% | 7% | 14% | 4% | 28% | 1% |

2015 Election Results

| 29% | 11% | 27% | 2% | 30% | 1% |

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	5	0
CPC	1	0
NDP	3	14
Bloc	9	4

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

Green Target: Despite large gains elsewhere, the Green vote in these seats is only up 3 points. They may still make gains in their best targets, but these could all be very close races.
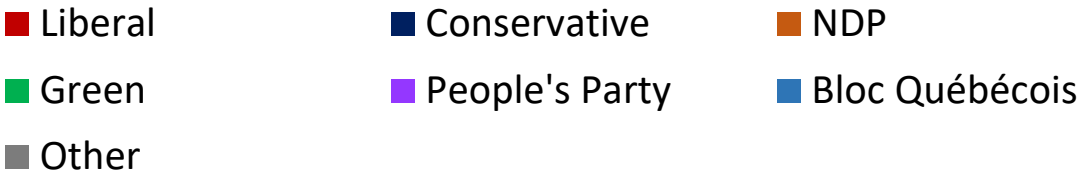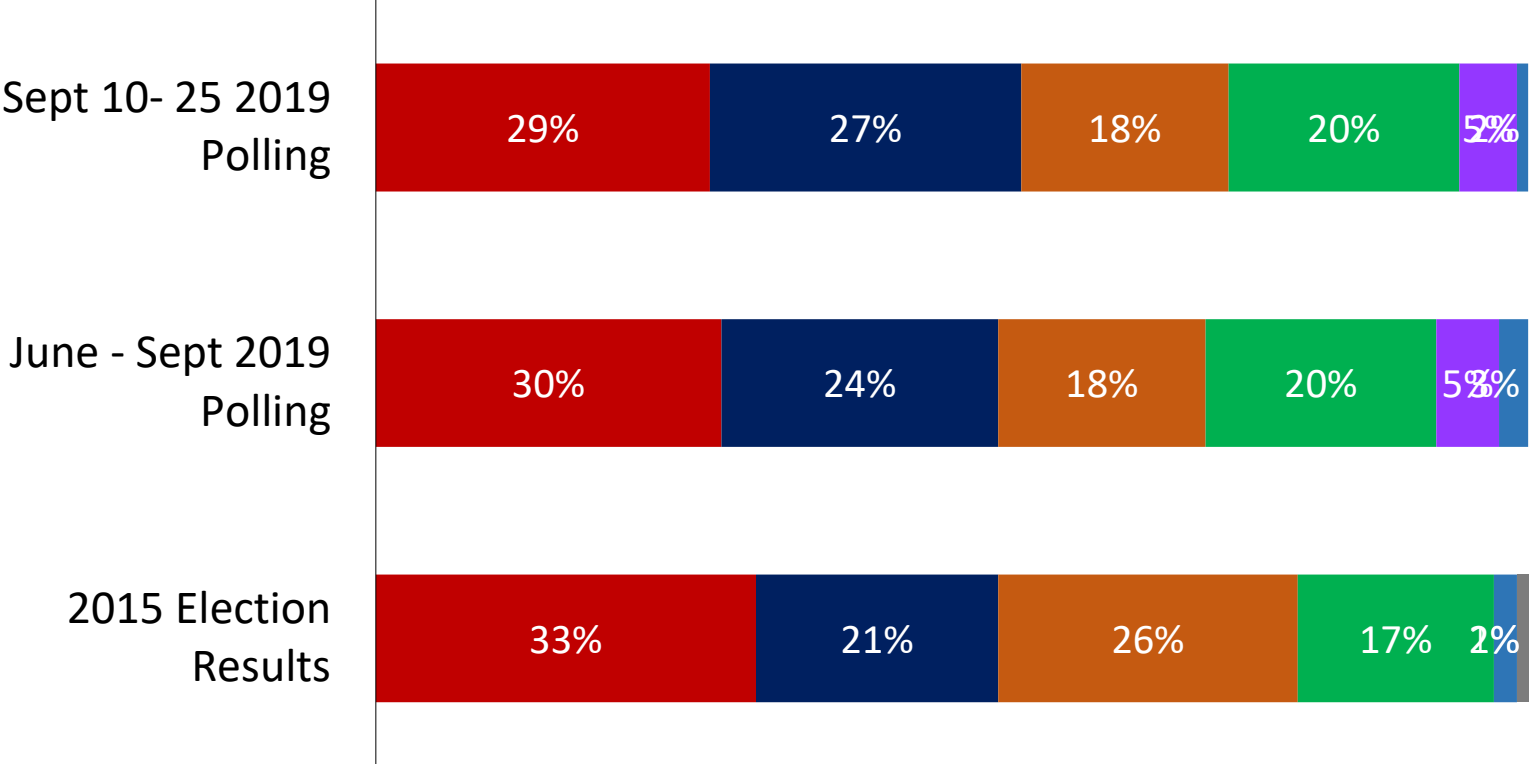
Seats where the Greens showed some strength in 2015 and could target this time around. 7/15 of these seats are on Vancouver Island.

Sept 10- 25 2019 Polling

Liberal	Conservative	NDP	Green	People's Party
29%	27%	18%	20%	5% 2%

June - Sept 2019 Polling

Liberal	Conservative	NDP	Green	People's Party	Bloc
30%	24%	18%	20%	5% 2%	

2015 Election Results

Liberal	Conservative	NDP	Green
33%	21%	26%	17% 2%

Legend:
- ■ Liberal
- ■ Conservative
- ■ NDP
- ■ Green
- ■ People's Party
- ■ Bloc Québécois
- ■ Other

Party	Seats Won 2015	Seats Won 2011*
Liberal	6	2
CPC	0	5
NDP	7	7
Bloc	1	0
Green	1	1

*2011 results were transposed from previous riding boundaries to the 338 current federal electoral districts

INNOVATIVE RESEARCH GROUP

Leadership

Leader Impressions: Trudeau and Scheer are equally unpopular; both May and Singh have net positive favourables

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=2,000]

Net Favourability
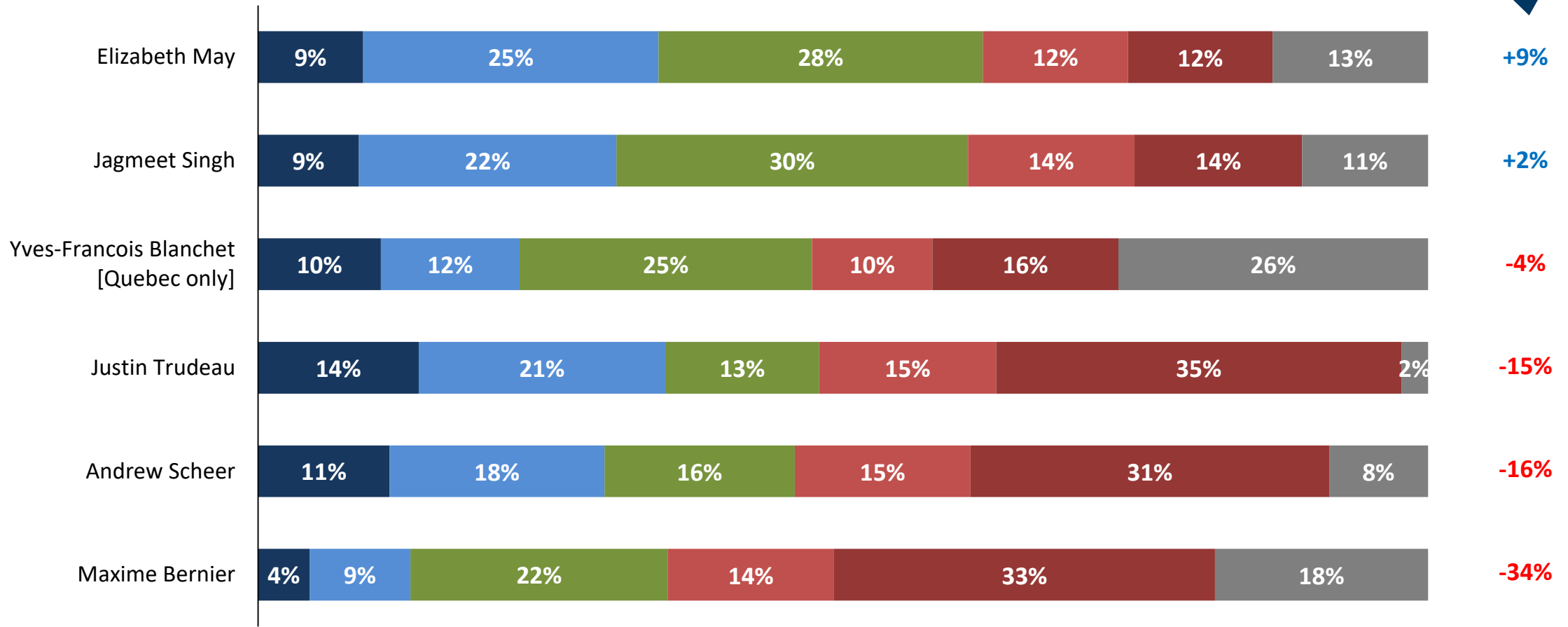
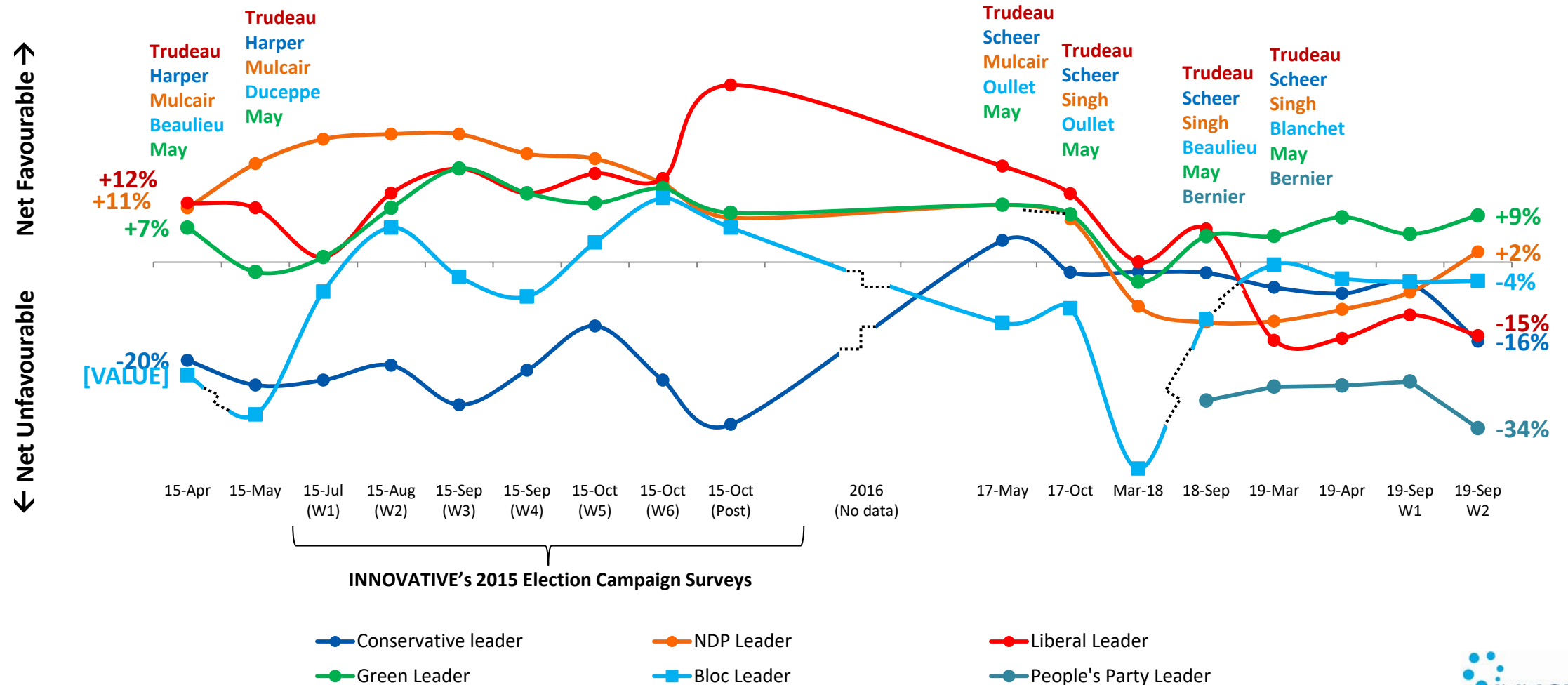| Name	Very favourable	Somewhat favourable	Neutral/Neither	Somewhat unfavourable	Very unfavourable	DK/Do not recognize	Net Favourability
Elizabeth May	9%	25%	28%	12%	12%	13%	+9%
Jagmeet Singh	9%	22%	30%	14%	14%	11%	+2%
Yves-Francois Blanchet [Quebec only]	10%	12%	25%	10%	16%	26%	-4%
Justin Trudeau	14%	21%	13%	15%	35%	2%	-15%
Andrew Scheer	11%	18%	16%	15%	31%	8%	-16%
Maxime Bernier	4%	9%	22%	14%	33%	18%	-34%

Legend:
- ■ Very favourable
- ■ Somewhat favourable
- ■ Neutral/Neither favourable nor unfavourable
- ■ Somewhat unfavourable
- ■ Very unfavourable
- ■ DK/Do not recognize

INNOVATIVE
RESEARCH GROUP

Net leader favourables: Jagmeet Singh now has a net positive impression, for the first time since October 2017

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. **Net favourables (% favourable-unfavourable) INCLUDES 'HAVE NOT HEARD' for tracking consistency.**

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

INNOVATIVE's 2015 Election Campaign Surveys

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

Note: BQ leaders asked in **Quebec only.**

⋯⋯⋯ : indicates a change in party leader during tracking

Best Prime Minister - Decided: Trudeau maintains best Prime Minister lead over Andrew Scheer

Q Which of the following party leaders would make the best Prime Minister of Canada?
[Bloc Quebecois asked only in Quebec] [Results show decided only, n=1,549]

Justin Trudeau of the Liberals
Andrew Scheer / Stephen Harper of the Conservatives
Jagmeet Singh / Thomas Mulcair of the NDP
Yves-Francois Blanchet / Mario Beaulieu / Martine Oullet / Gilles Duceppe of the Bloc Quebecois
Elizabeth May of the Green Party
Maxime Bernier of the People's Party

Note: 'None', 'Don't know', 'Refused' not included in calculations. BQ Leader asked in QC only.

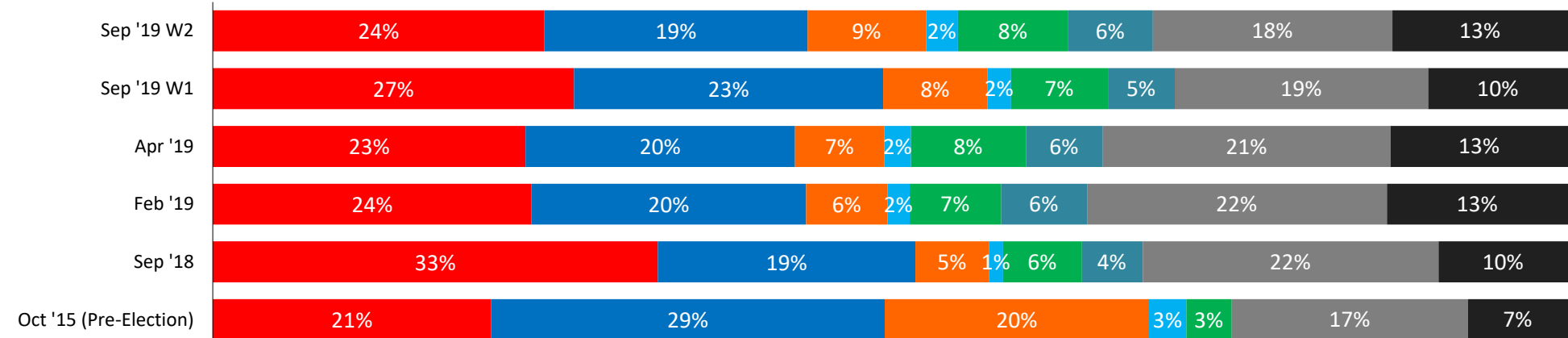⋯⋯ : indicates a change in party leader during tracking

Leader Qualities: Both Andrew Scheer and Justin Trudeau are down on 'Strong leadership'; Elizabeth May improves on 'Competent'

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

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

Strong leadership

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	24%	19%	9%	2%	8%	6%	18%	13%
Sep '19 W1	27%	23%	8%	2%	7%	5%	19%	10%
Apr '19	23%	20%	7%	2%	8%	6%	21%	13%
Feb '19	24%	20%	6%	2%	7%	6%	22%	13%
Sep '18	33%	19%	5%	1%	6%	4%	22%	10%
Oct '15 (Pre-Election)	21%	29%	20%		3%	3%	17%	7%

Competent

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	24%	23%	10%	3%	11%	5%	16%	8%
Sep '19 W1	25%	23%	9%	2%	8%	5%	19%	9%
Apr '19	21%	21%	8%	2%	11%	6%	20%	11%
Feb '19	22%	23%	7%	2%	9%	5%	22%	10%
Sep '18	31%	21%	7%	2%	7%	4%	21%	7%
Oct '15 (Pre-Election)	20%	27%	21%	3%	5%		17%	7%

Legend:
- ■ Justin Trudeau
- ■ Andrew Scheer
- ■ Jagmeet Singh
- ■ Yves-Francois Blanchet
- ■ Elizabeth May
- ■ Maxime Bernier
- ■ Undecided
- ■ None

INNOVATIVE RESEARCH GROUP

* The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ).

Leader Qualities: Jagmeet Singh is up across 'Represents positive change', 'Cares about people like me', and 'Stands for what I believe in'
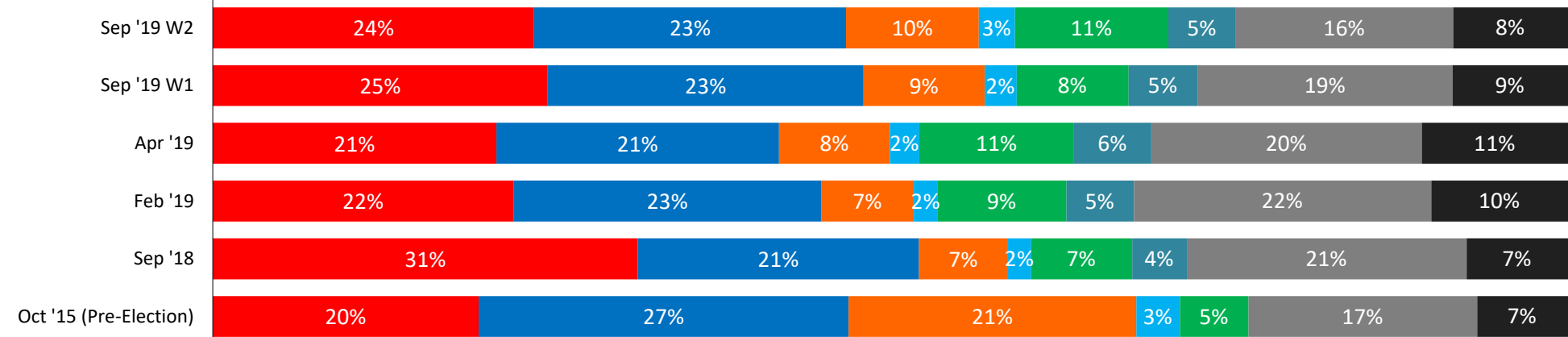
Q Now we would like to read you a list of different words or phrases that describe the some political leaders. For each word or phrase, please indicate who it BEST describes… **[ALL CANADA]**

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

Represents positive change

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	21%	21%	13%	3%	14%	6%	13%	10%
Sep '19 W1	23%	23%	11%	2%	12%	5%	16%	8%
Apr '19	21%	19%	11%	2%	13%	7%	17%	10%
Feb '19	21%	20%	9%	2%	12%	7%	18%	11%
Oct '15 (Pre-Election)	31%	14%	19%	2%	7%		16%	11%

Cares about people like me

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	21%	20%	15%	3%	10%	5%	15%	12%
Sep '19 W1	22%	21%	12%	3%	10%	4%	16%	12%
Apr '19	21%	19%	11%	3%	11%	5%	17%	13%
Feb '19	20%	18%	10%	3%	11%	6%	18%	13%
Sep '18	26%	17%	11%	3%	8%	5%	20%	10%
Oct '15 (Pre-Election)	25%	18%	20%	4%	7%		15%	11%

Stands for what I believe

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	23%	21%	12%	3%	11%	5%	14%	10%
Sep '19 W1	23%	22%	9%	3%	11%	5%	17%	10%
Oct '15 (Pre-Election)	18%	21%	21%	5%	7%		17%	10%

Legend: ■ Justin Trudeau ■ Andrew Scheer ■ Jagmeet Singh ■ Yves-Francois Blanchet ■ Elizabeth May ■ Maxime Bernier ■ Undecided ■ None
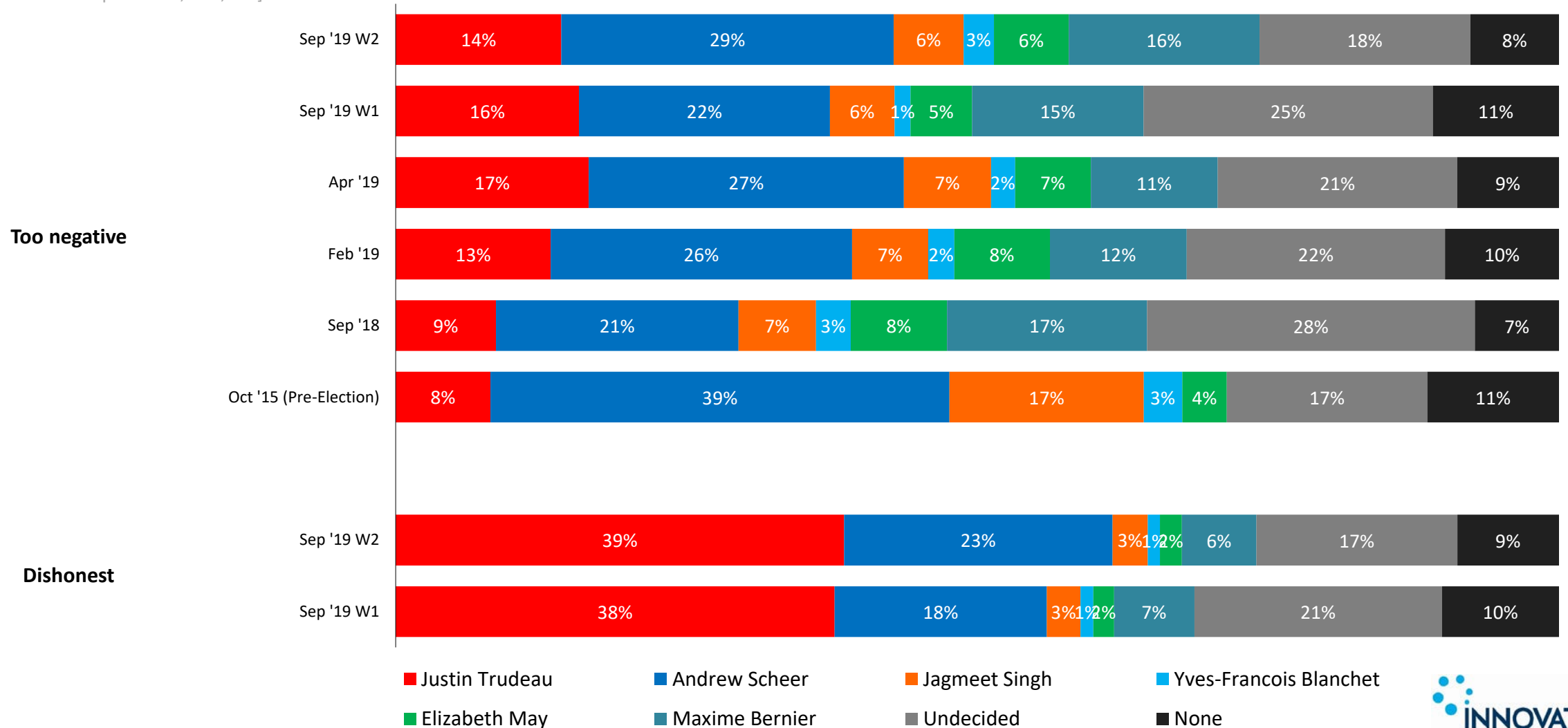
INNOVATIVE RESEARCH GROUP

* The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ).

Leader Qualities: Andrew Scheer is up on both 'Too negative' and 'Dishonest' while Trudeau remains steady on both

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

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

Too negative

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	14%	29%	6%	3%	6%	16%	18%	8%
Sep '19 W1	16%	22%	6%	1%	5%	15%	25%	11%
Apr '19	17%	27%	7%	2%	7%	11%	21%	9%
Feb '19	13%	26%	7%	2%	8%	12%	22%	10%
Sep '18	9%	21%	7%	3%	8%	17%	28%	7%
Oct '15 (Pre-Election)	8%	39%	17%	3%	4%		17%	11%

Dishonest

	Justin Trudeau	Andrew Scheer	Jagmeet Singh	Yves-Francois Blanchet	Elizabeth May	Maxime Bernier	Undecided	None
Sep '19 W2	39%	23%	3%	1%	2%	6%	17%	9%
Sep '19 W1	38%	18%	3%	1%	2%	7%	21%	10%

Legend:
- 🟥 Justin Trudeau
- 🟦 Andrew Scheer
- 🟧 Jagmeet Singh
- 🟦 Yves-Francois Blanchet
- 🟩 Elizabeth May
- 🟦 Maxime Bernier
- ⬜ Undecided
- ⬛ None

INNOVATIVE RESEARCH GROUP

* The study of 2015 was conducted before the writ was dropped in August 2015. 2015 numbers show Stephen Harper (CPC), Thomas Mulcair (NDP) and Gilles Duceppe (BQ).
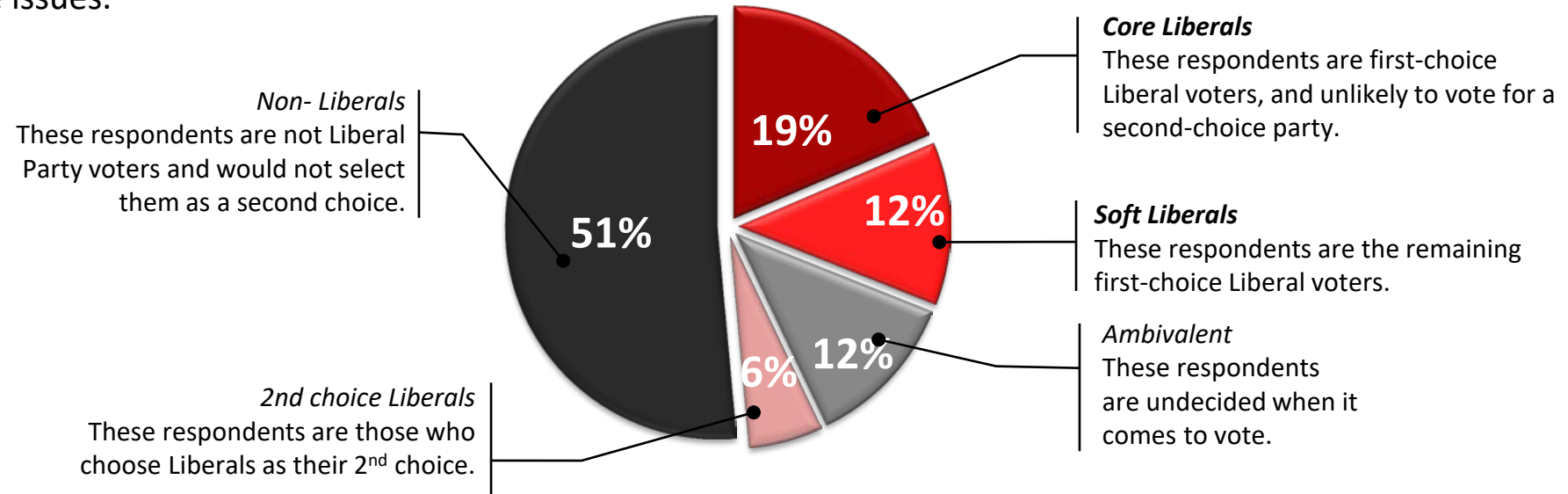
Blackface

Key Liberals and Tory Groups

To provide a deeper analysis of the issues surrounding the Blackface photos and the Conservative candidates, we have created a segmentation to analyze each of those issues.
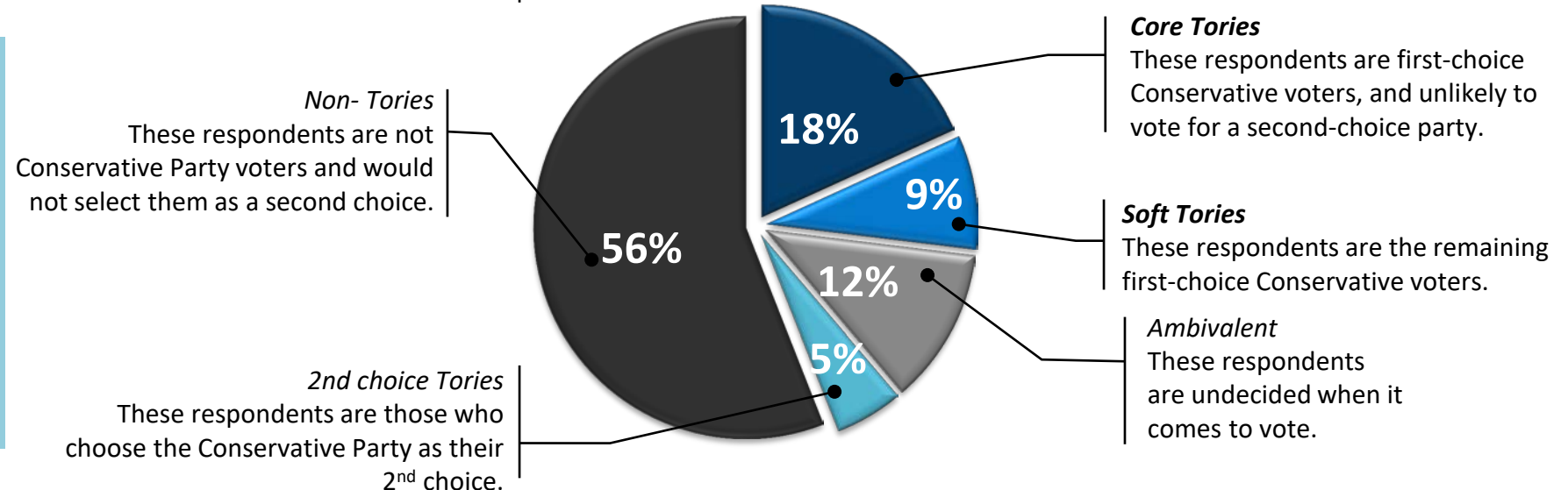
We created a segmentation that groups individuals based on their level of the **Liberal Party** support to analyze the issues surrounding the Blackface photos.

The analysis focuses on understanding how the **Core Liberals** and **Soft Liberals** view the Blackface photos.

Non- Liberals
These respondents are not Liberal Party voters and would not select them as a second choice.

2nd choice Liberals
These respondents are those who choose Liberals as their 2nd choice.

Core Liberals
These respondents are first-choice Liberal voters, and unlikely to vote for a second-choice party.

Soft Liberals
These respondents are the remaining first-choice Liberal voters.

Ambivalent
These respondents are undecided when it comes to vote.

19%
12%
51%
6% 12%

We created a segmentation that groups individuals based on their level of the **Conservative Party** support to analyze the issues surrounding the Conservative candidates.

The analysis focuses on understanding how the **Core Tories** and **Soft Tories** view the Conservative candidates.

Non- Tories
These respondents are not Conservative Party voters and would not select them as a second choice.

2nd choice Tories
These respondents are those who choose the Conservative Party as their 2nd choice.

Core Tories
These respondents are first-choice Conservative voters, and unlikely to vote for a second-choice party.

Soft Tories
These respondents are the remaining first-choice Conservative voters.

Ambivalent
These respondents are undecided when it comes to vote.

18%
9%
56%
12%
5%

Awareness: Core and Soft LPC are much more aware of blackface controversy than Core/Soft CPC are aware of Scheer's decision
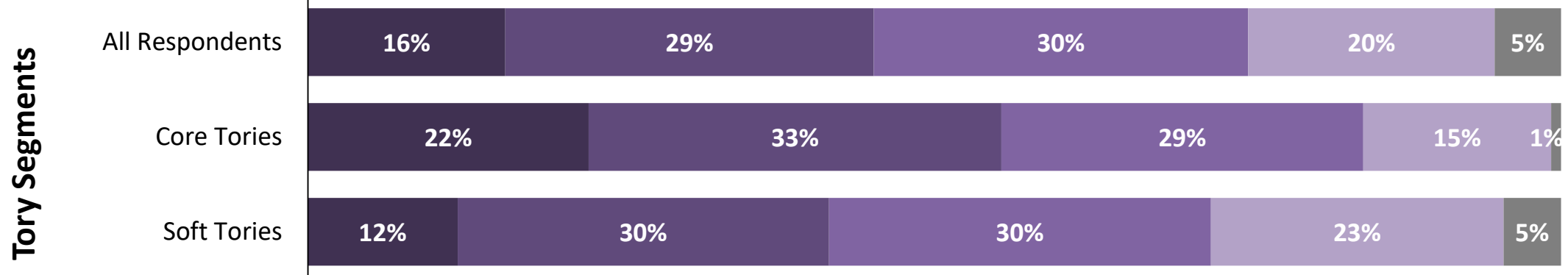
Q [The Blackface Photos] How closely have you been following news about the photos of Justin Trudeau in blackface and brownface makeup that have emerged, and Trudeau's apology for his actions? BY Liberal Segments
[asked of all respondents; n=2,000]

Liberal Segments

Segment	Very closely	Somewhat closely	Not very closely	Have not heard	Don't Know
All Respondents	36%	38%	18%	5%	3%
Core Liberals	48%	39%	10%	2%	1%
Soft Liberals	33%	44%	15%	6%	2%

Q [Conservative Candidates] How closely have you followed the news about Andrew Scheer's decision to support candidates who have been accused of making racist or homophobic comments in the past, so long as they apologize? BY Tory Segments
[asked of all respondents; n=2,000]

Tory Segments

Segment	Very closely	Somewhat closely	Not very closely	Have not heard	Don't Know
All Respondents	16%	29%	30%	20%	5%
Core Tories	22%	33%	29%	15%	1%
Soft Tories	12%	30%	30%	23%	5%

■ Very closely   ■ Somewhat closely
■ Not very closely   ■ Have not heard about them before this survey
■ Don't Know
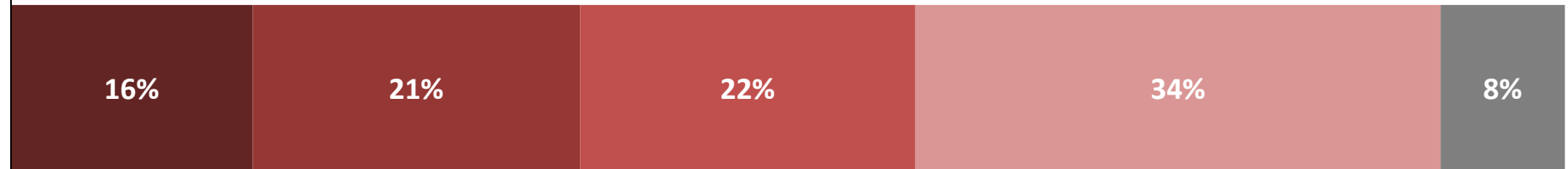
INNOVATIVE RESEARCH GROUP

What Do You Think of the Break-in?

Black and Brownface

Q Thinking about the fact that Justin Trudeau wore blackface multiple times in the past, how did that behavior leave you feeling?
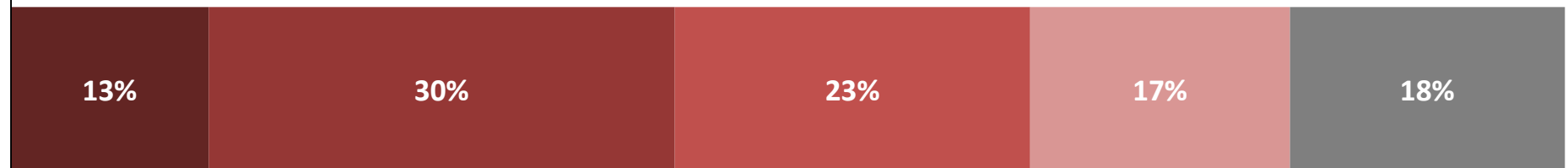[asked of all respondents; n=2,000]

All Respondents	16%	21%	22%	34%	8%

Conservative Candidates

Q Thinking about the past actions of these candidates, how did that behavior leave you feeling?
[asked of all respondents; n=2,000]

All Respondents	13%	30%	23%	17%	18%

■ Very angry ■ Somewhat angry ■ Not very angry ■ Not at all angry ■ Don't Know

INNOVATIVE RESEARCH GROUP

What Do You Think About the Cover-up?

Black and Brownface

Q Do you approve or disapprove of the way Justin Trudeau has handled the issue since it emerged?
[asked of all respondents; n=2,000]

Net Approval

| All Respondents | 16% | 22% | 25% | 12% | 17% | 8% | **+9%** |

Conservative Candidates

Q Do you approve or disapprove of the way Andrew Scheer has handled these candidates?
[asked of all respondents; n=2,000]

| All Respondents | 8% | 14% | 29% | 15% | 19% | 16% | **-12%** |

- ■ Strongly approve
- ■ Somewhat approve
- ■ Neither approve nor disapprove
- ■ Somewhat disapprove
- ■ Strongly disapprove
- ■ Don't Know

INNOVATIVE
RESEARCH GROUP
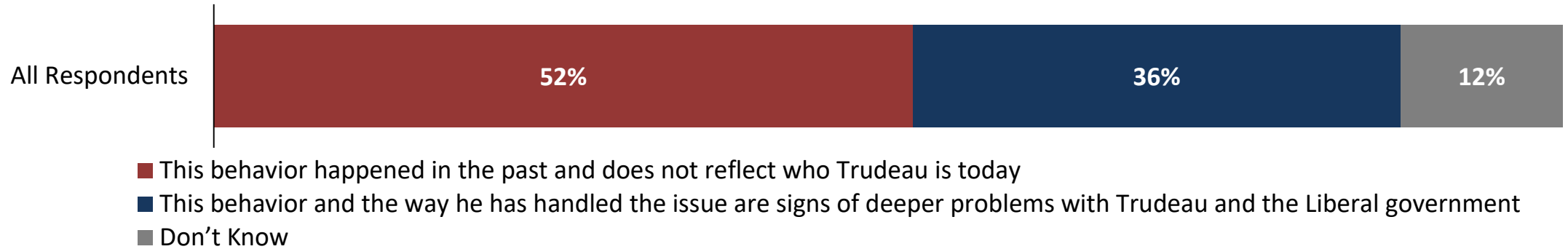
Framing: Is This a One-Off Issue or Does It Raise Deeper Questions?

Black and Brownface

Q Which of the following comes closest to your point of view?
[asked of all respondents; n=2,000]

All Respondents		
52%	36%	12%

■ This behavior happened in the past and does not reflect who Trudeau is today
■ This behavior and the way he has handled the issue are signs of deeper problems with Trudeau and the Liberal government
■ Don't Know

Conservative Candidates

Q Do you think these controversies are...?
[asked of all respondents; n=2,000]

All Respondents		
29%	43%	28%

■ Unique problems that are unlikely to be repeated
■ A symptom of deeper problems in the Conservative party
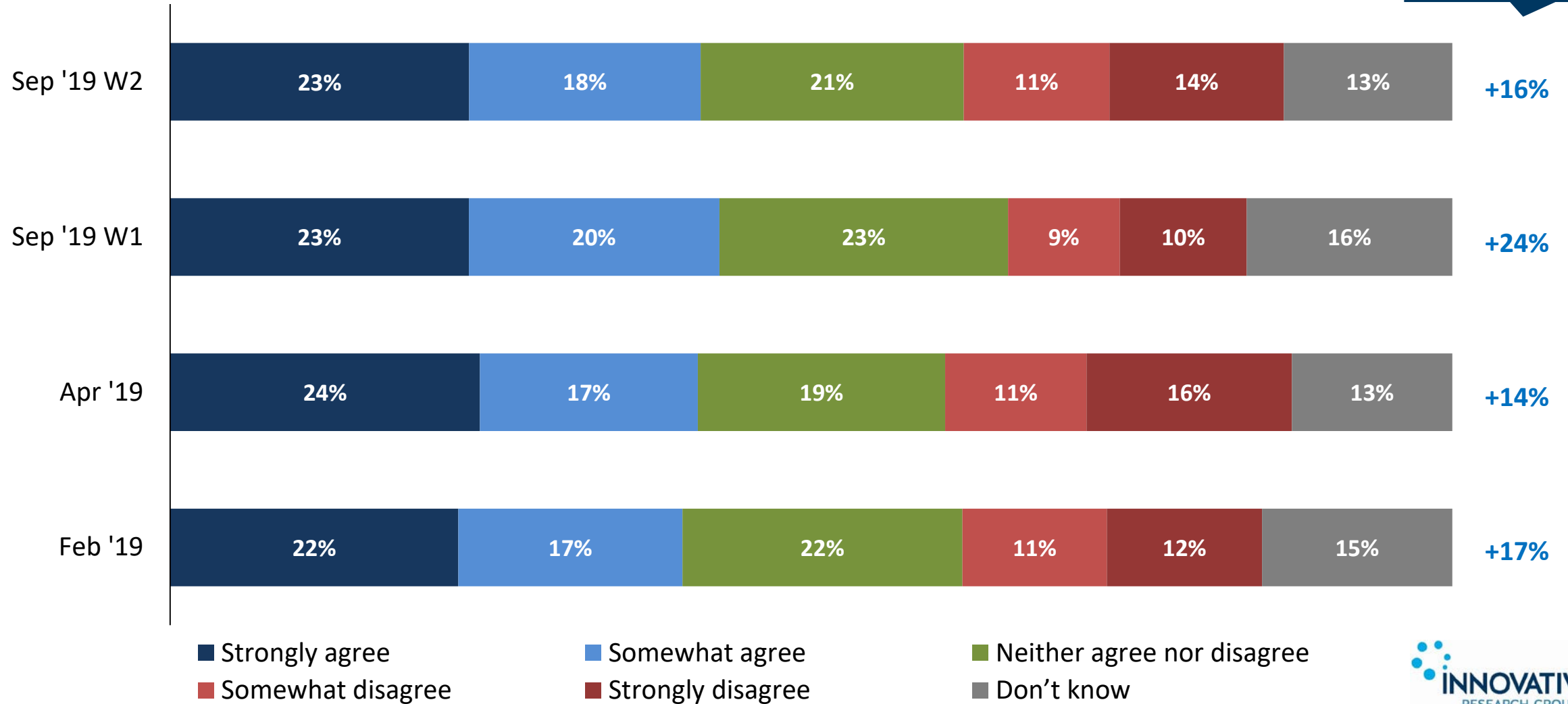■ Don't Know

INNOVATIVE RESEARCH GROUP

Leakage to SNC- Lavalin?

Q Do you agree or disagree with the following statements? The way Jody Wilson-Raybould was treated by the Prime Minister proves he isn't really committed to progressive change for women and indigenous Canadians.
[asked of all respondents; n=2,000]

Net Agreement

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agreement
Sep '19 W2	23%	18%	21%	11%	14%	13%	+16%
Sep '19 W1	23%	20%	23%	9%	10%	16%	+24%
Apr '19	24%	17%	19%	11%	16%	13%	+14%
Feb '19	22%	17%	22%	11%	12%	15%	+17%

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

INNOVATIVE RESEARCH GROUP

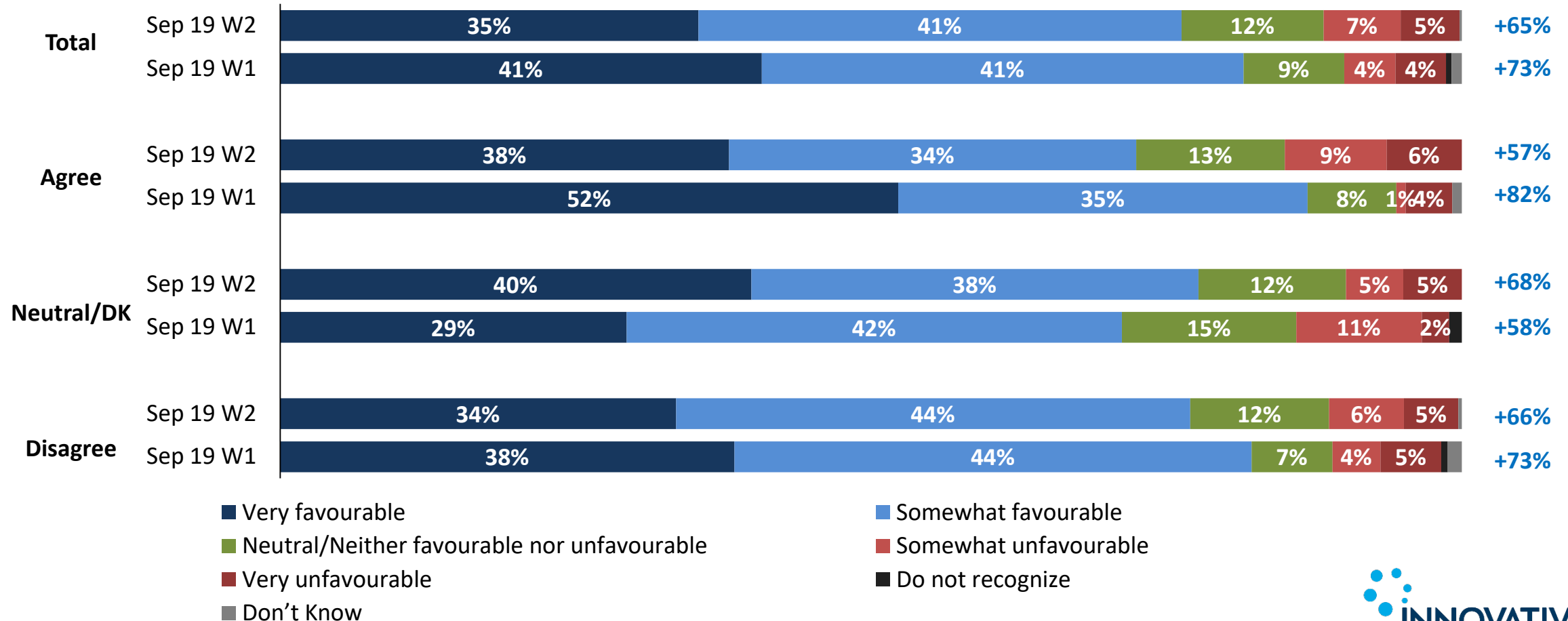# Making a Withdrawal from Reputational Capital

Q Trudeau's Favourability by: Do you agree or disagree with the following statement? I experience discrimination in my daily life.
[showing only Liberal partisans; n=558]

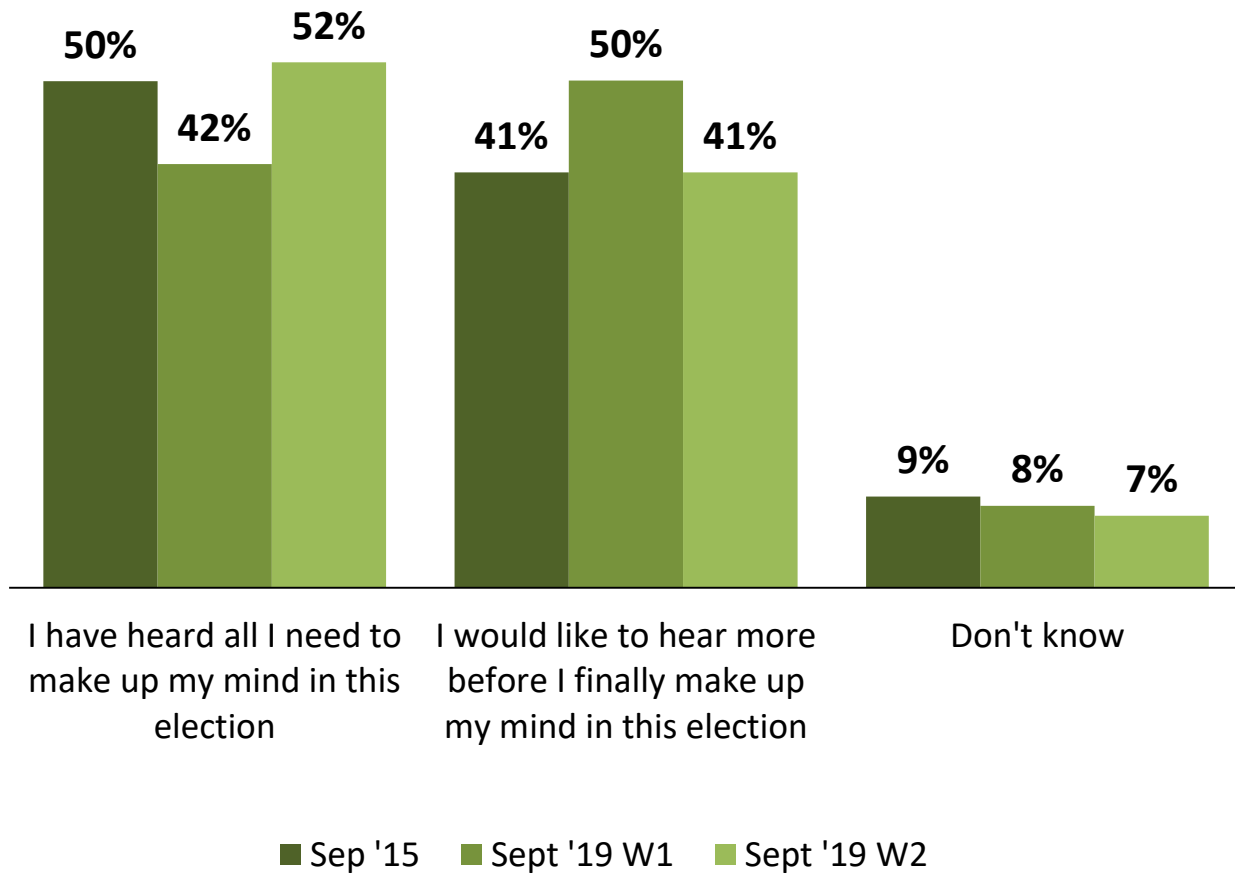**Net Favourability**

Among Liberal Partisans:

Agree/Disagree: I experience discrimination in my daily life.

		Very favourable	Somewhat favourable	Neutral	Somewhat unfavourable	Very unfavourable	Net Favourability
Total	Sep 19 W2	35%	41%	12%	7%	5%	+65%
	Sep 19 W1	41%	41%	9%	4%	4%	+73%
Agree	Sep 19 W2	38%	34%	13%	9%	6%	+57%
	Sep 19 W1	52%	35%	8%	1% 4%		+82%
Neutral/DK	Sep 19 W2	40%	38%	12%	5%	5%	+68%
	Sep 19 W1	29%	42%	15%	11%	2%	+58%
Disagree	Sep 19 W2	34%	44%	12%	6%	5%	+66%
	Sep 19 W1	38%	44%	7%	4%	5%	+73%

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

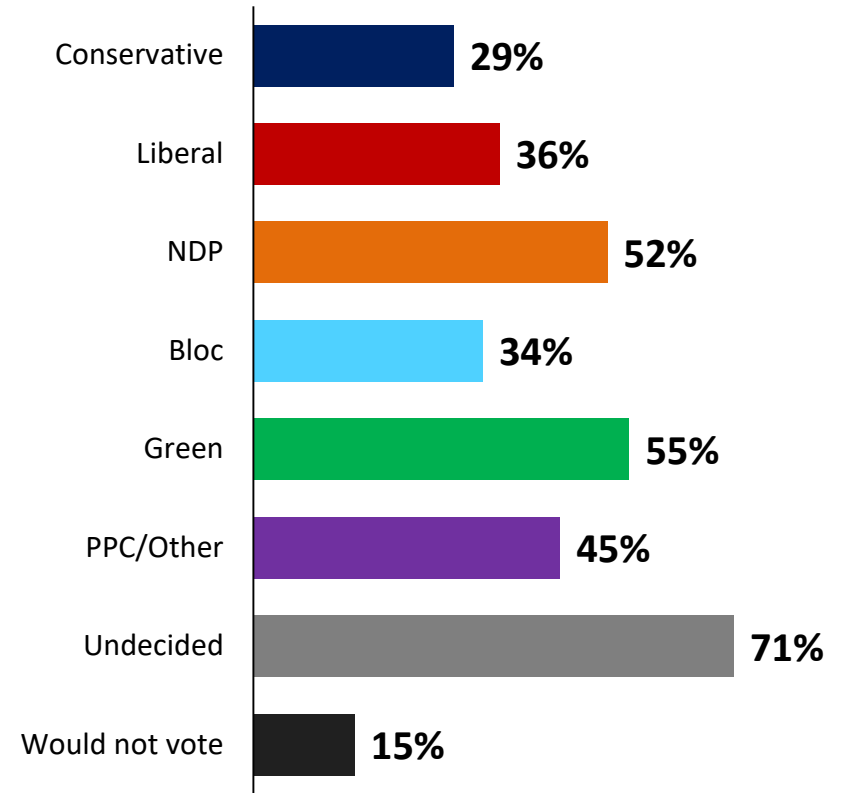INNOVATIVE RESEARCH GROUP

Where Now?

Made up Mind: The share of respondents who say they have heard all they need to hear is up since early September

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

% Would like to hear more
By current combined vote choice

Party	%
Conservative	29%
Liberal	36%
NDP	52%
Bloc	34%
Green	55%
PPC/Other	45%
Undecided	71%
Would not vote	15%

Left chart:

I have heard all I need to make up my mind in this election:
- Sep '15: 50%
- Sept '19 W1: 42%
- Sept '19 W2: 52%

I would like to hear more before I finally make up my mind in this election:
- Sep '15: 41%
- Sept '19 W1: 50%
- Sept '19 W2: 41%

Don't know:
- Sep '15: 9%
- Sept '19 W1: 8%
- Sept '19 W2: 7%

Legend: ■ Sep '15 ■ Sept '19 W1 ■ Sept '19 W2
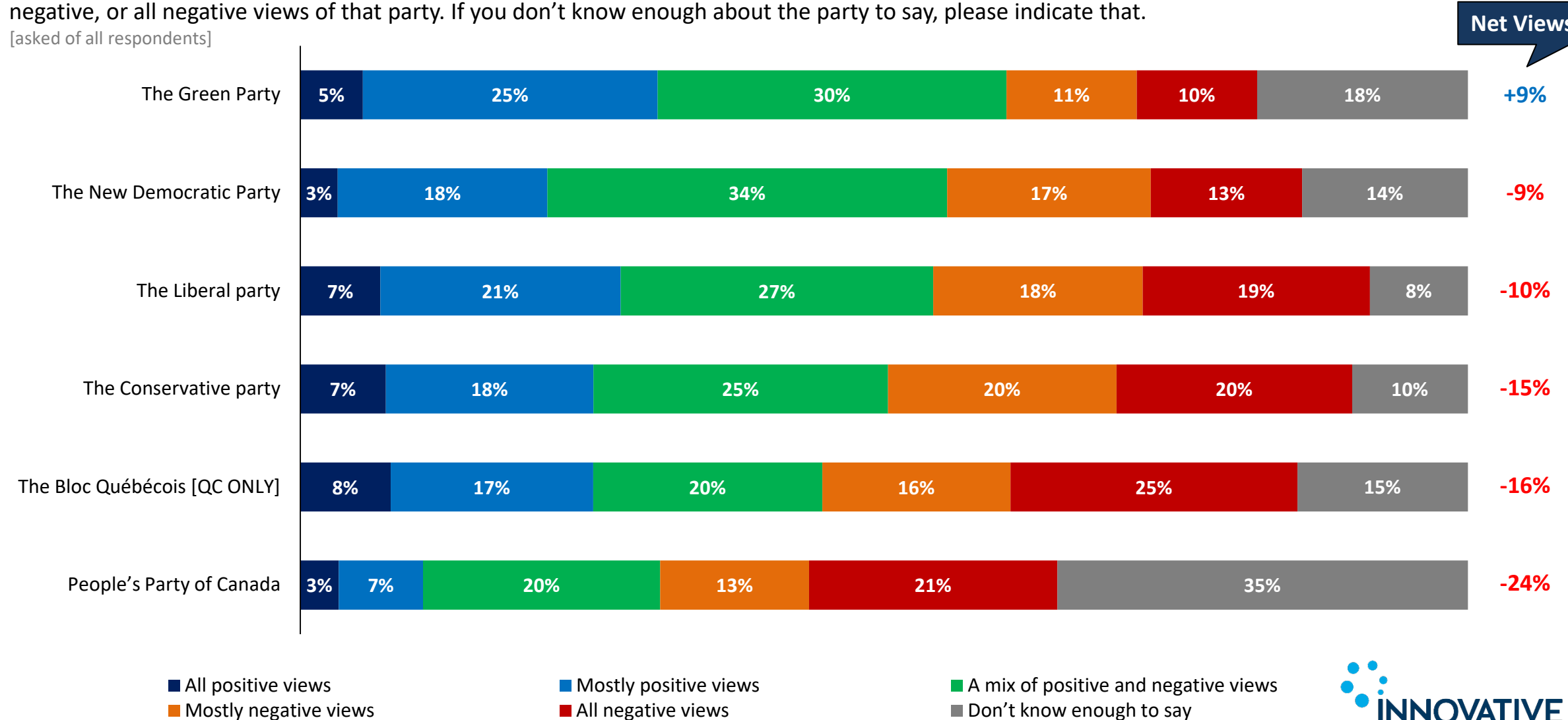
INNOVATIVE RESEARCH GROUP

Views of Parties: The Green Party the only party with net positive views; the PC party with the lowest net views at -24%

Q Thinking about each of the following parties, please indicate if you have all positive, mostly positive, some positive and some negative, mostly negative, or all negative views of that party. If you don't know enough about the party to say, please indicate that.
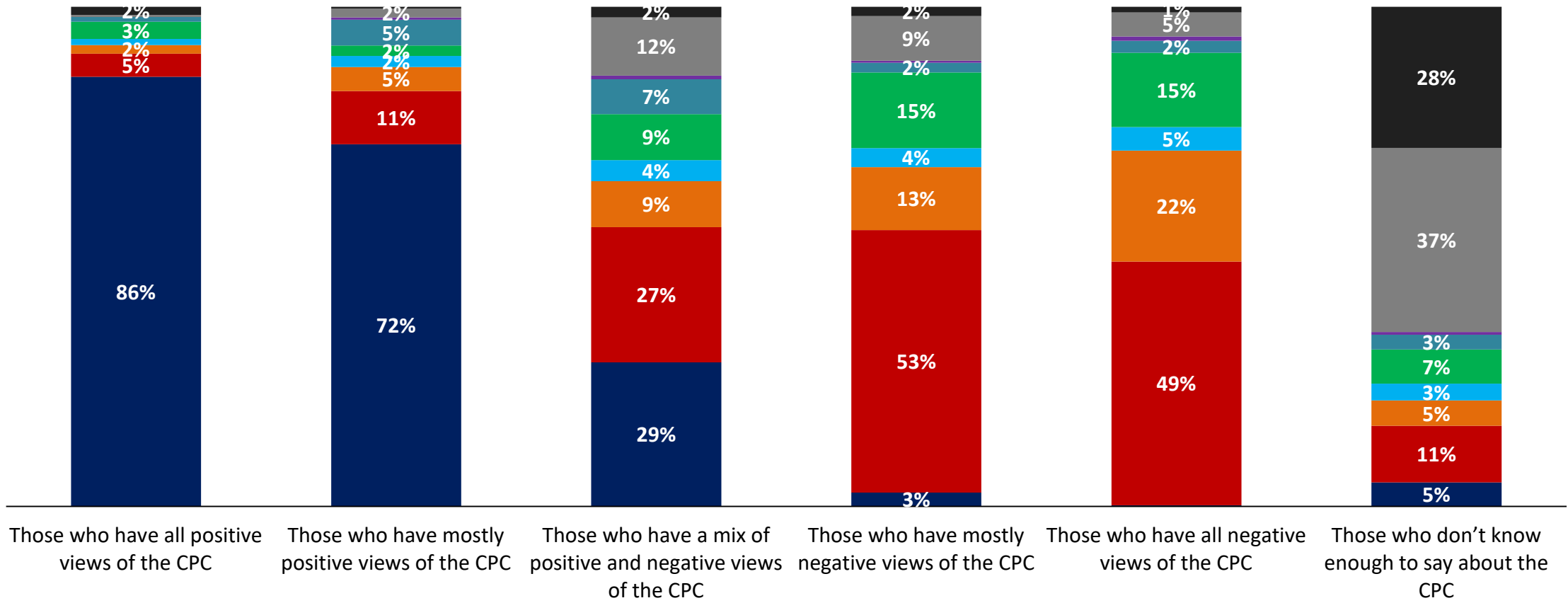
[asked of all respondents]

Net Views

Party	All positive views	Mostly positive views	A mix of positive and negative views	Mostly negative views	All negative views	Don't know enough to say	Net Views
The Green Party	5%	25%	30%	11%	10%	18%	+9%
The New Democratic Party	3%	18%	34%	17%	13%	14%	-9%
The Liberal party	7%	21%	27%	18%	19%	8%	-10%
The Conservative party	7%	18%	25%	20%	20%	10%	-15%
The Bloc Québécois [QC ONLY]	8%	17%	20%	16%	25%	15%	-16%
People's Party of Canada	3%	7%	20%	13%	21%	35%	-24%

Legend:
- All positive views
- Mostly positive views
- A mix of positive and negative views
- Mostly negative views
- All negative views
- Don't know enough to say

INNOVATIVE RESEARCH GROUP

Vote by view of the Conservative Party: Support dips sharply between those with mostly positive and mixed views of the CPC

Q COMBINED VOTE BY Thinking about each of the following parties, please indicate if you have all positive, mostly positive, some positive and some negative, mostly negative, or all negative views of that party. If you don't know enough about the party to say, please indicate that. **The Conservative Party**
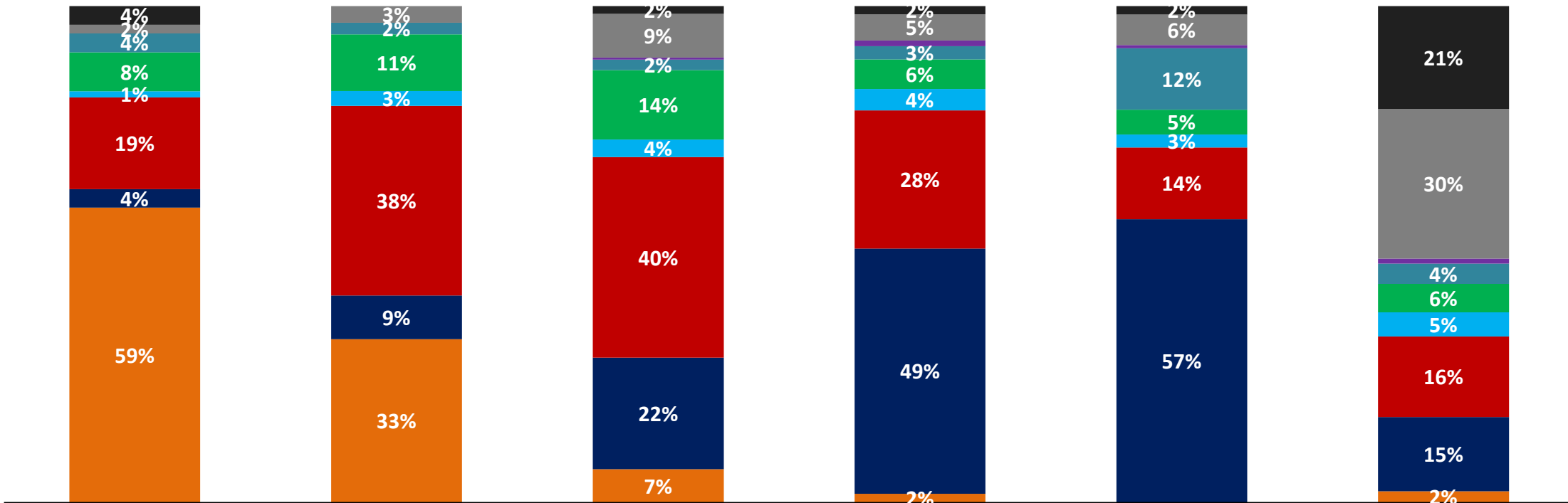
[asked of all respondents]

	Those who have all positive views of the CPC	Those who have mostly positive views of the CPC	Those who have a mix of positive and negative views of the CPC	Those who have mostly negative views of the CPC	Those who have all negative views of the CPC	Those who don't know enough to say about the CPC
Conservative	86%	72%	29%	3%		5%
Liberal	5%	11%	27%	53%	49%	11%
NDP	2%	5%	9%	13%	22%	5%
Bloc		2%	4%	4%	5%	3%
Green	3%	2%	9%	15%	15%	7%
People's Party		5%	7%			3%
Other				2%	2%	
Undecided DK			12%	9%	5%	37%
Would not vote None	2%	2%	2%	2%	1%	28%

Legend: Conservative, Liberal, NDP, Bloc, Green, People's Party, Other, Undecided DK, Would not vote None

INNOVATIVE RESEARCH GROUP

Vote by view of the NDP: The NDP trails the Liberals by 5 points among those with mostly positive views of the party

Q COMBINED VOTE BY Thinking about each of the following parties, please indicate if you have all positive, mostly positive, some positive and some negative, mostly negative, or all negative views of that party. If you don't know enough about the party to say, please indicate that. **The New Democratic Party**

[asked of all respondents]

	Those who have all positive views of the NDP	Those who have mostly positive views of the NDP	Those who have a mix of positive and negative views of the NDP	Those who have mostly negative views of the NDP	Those who have all negative views of the NDP	Those who don't know enough to say about the NDP
NDP	59%	33%	7%	2%		2%
Conservative	4%	9%	22%	49%	57%	15%
Liberal	19%	38%	40%	28%	14%	16%
Bloc	1%	3%	4%	4%	3%	5%
Green	8%	11%	14%	6%	5%	6%
People's Party	4%				12%	4%
Other	2%	2%	2%	3%		
Undecided DK	2%	3%	9%	5%	6%	30%
Would not vote None	4%		2%	2%	2%	21%

INNOVATIVE RESEARCH GROUP

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

Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.
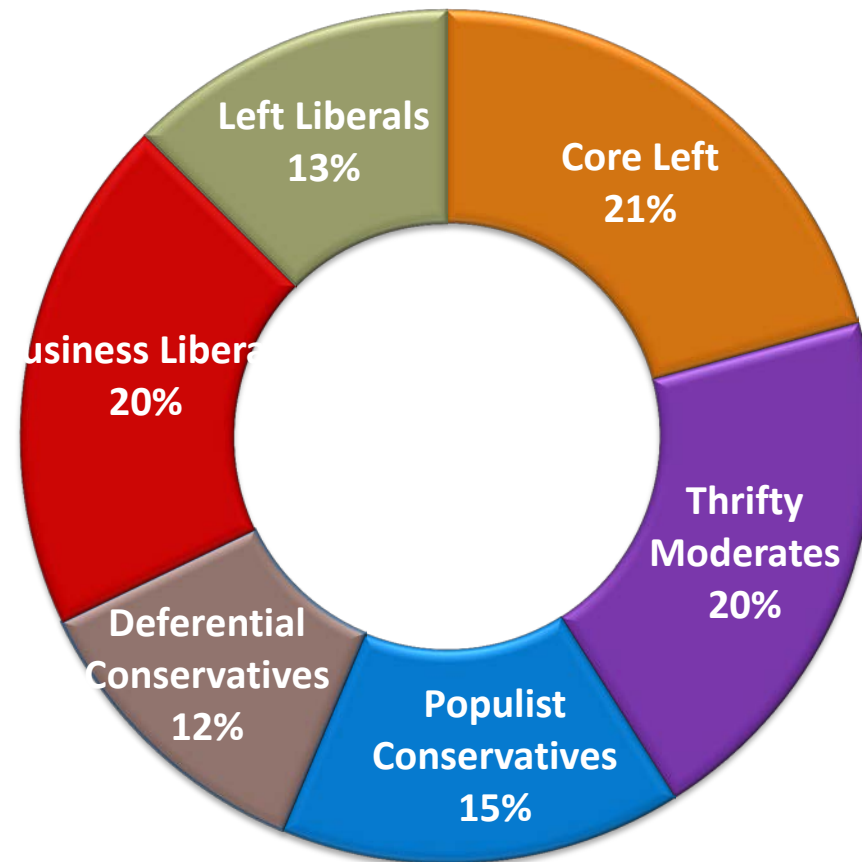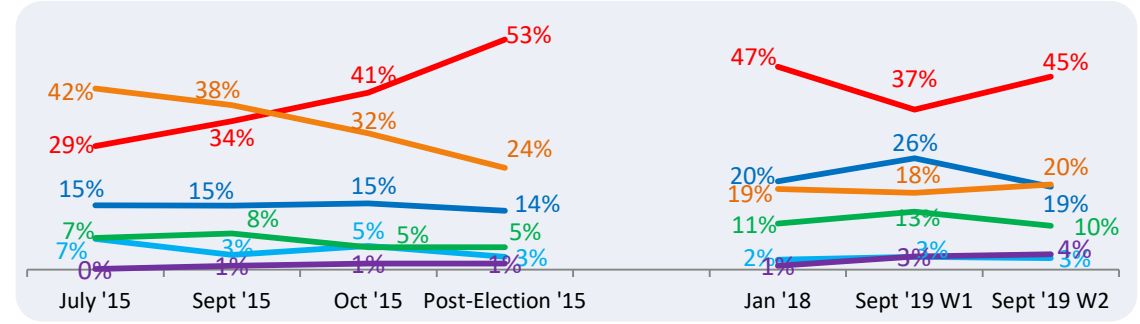

Note: Showing September 2019 Wave 2 results.

Value Clusters: Liberals rebound with Core Left and Left Liberals, while the Conservatives dip among Business Liberals
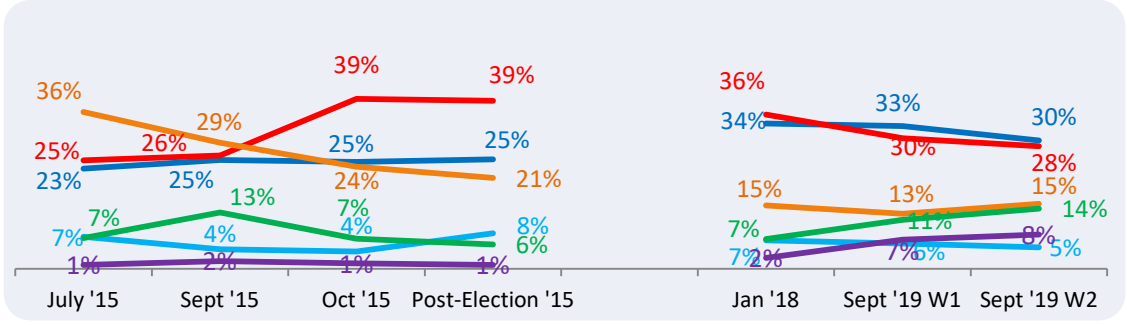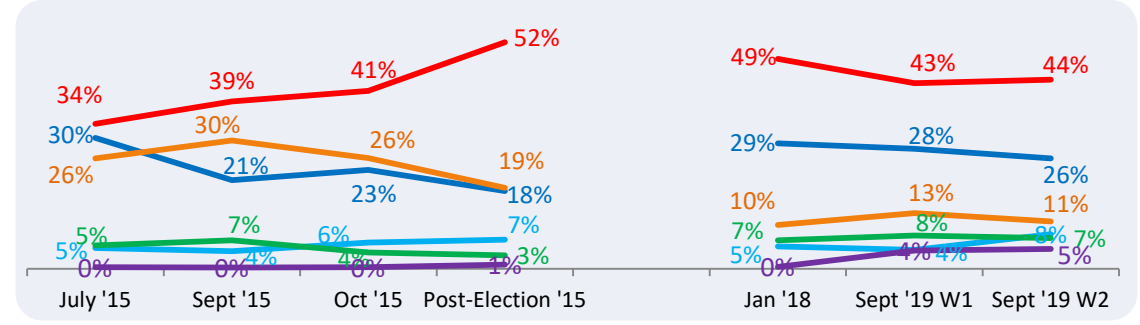

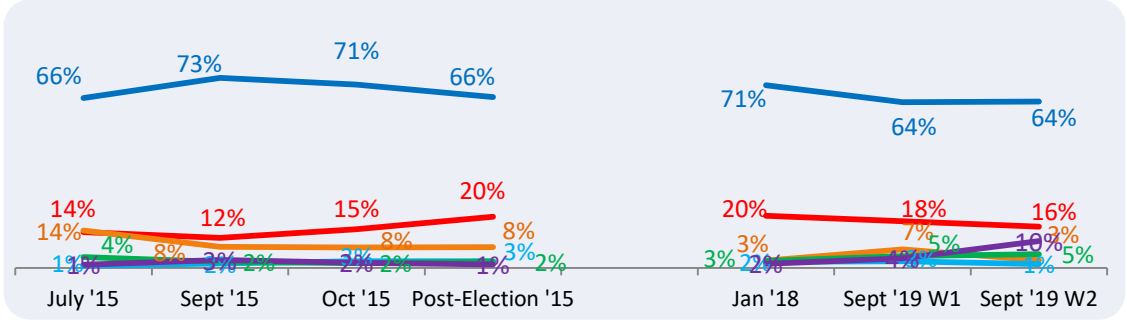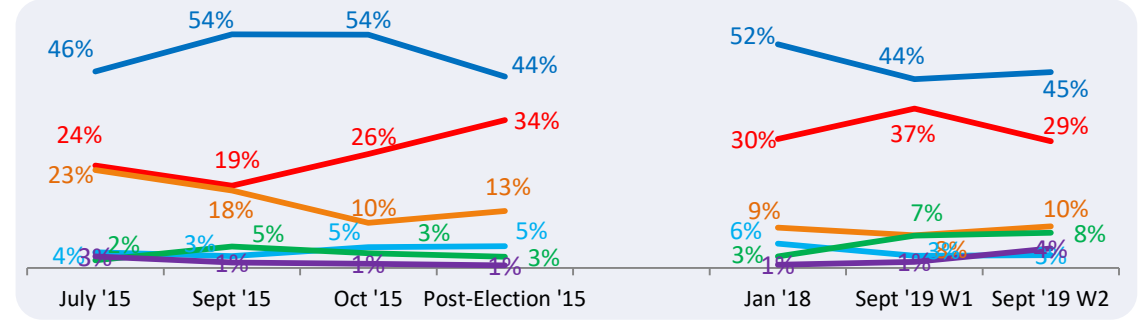## Core Left
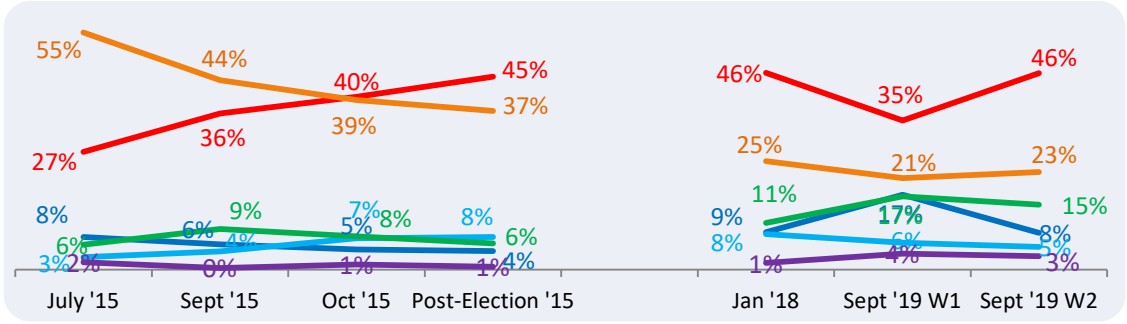
Left Liberals

Thrifty Moderates

Business Liberals

Populist Conservatives

Deferential Conservatives

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

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

Economic Gap Segmentation: Just under 3-in-10 (28%) believe in the Canadian dream but are struggling to get by

Q 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*".

Don't believe in Canadian Dream

Believe in Canadian Dream, not struggling to get by

Alienated
22%

Canadian Dream Achievers
29%

Neutral or don't know on Canadian Dream

Ambivalent
21%

Canadian Dream Strugglers
28%

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

INNOVATIVE RESEARCH GROUP
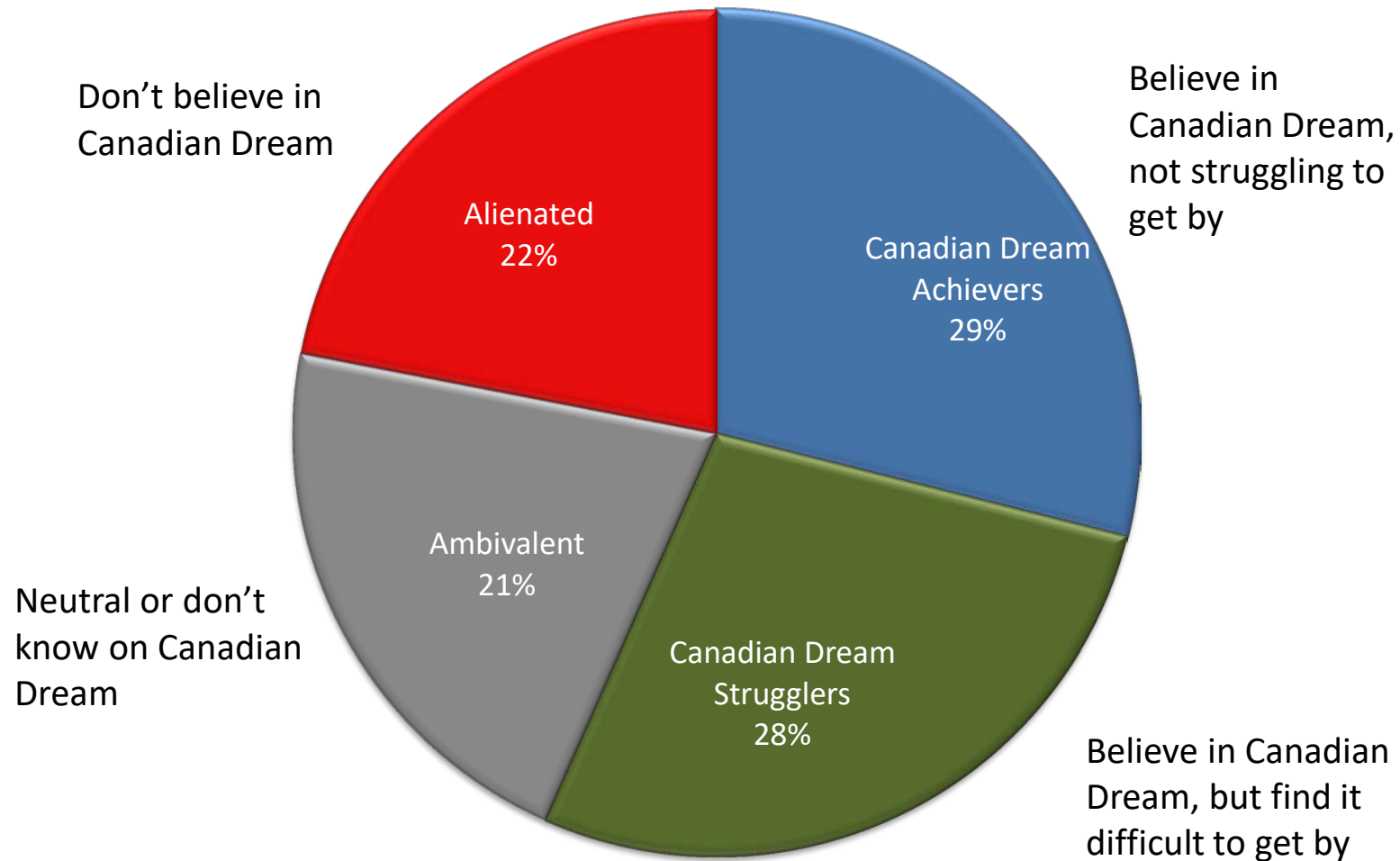
Federal Vote by Gap Segments: Liberals are down among Strugglers and Achievers since October 2016

Canadian Dream Achievers
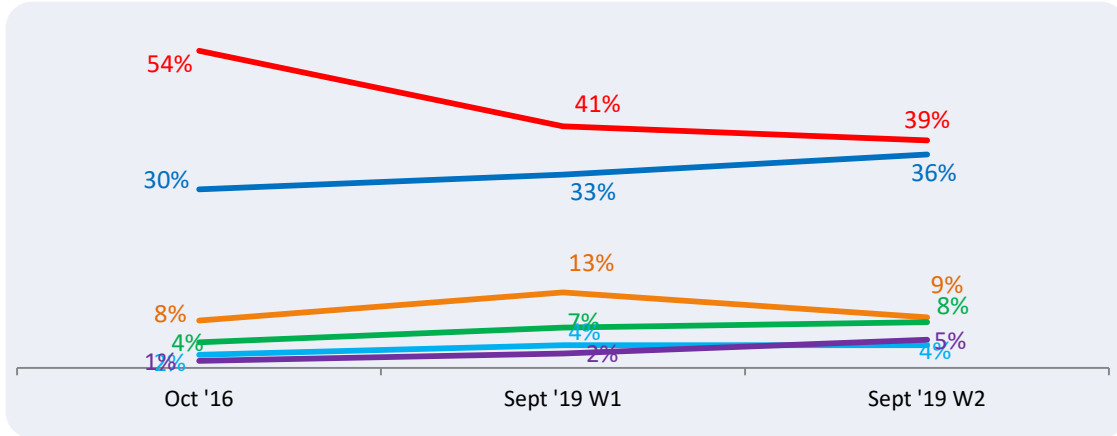
	Oct '16	Sept '19 W1	Sept '19 W2
Liberal	54%	41%	39%
Conservative	30%	33%	36%
NDP	8%	13%	9%
Green	4%	7%	8%
Bloc	1%	4%	5%
PPC/Other	1%	2%	4%

Canadian Dream Strugglers

	Oct '16	Sept '19 W1	Sept '19 W2
Liberal	44%	32%	28%
Conservative	32%	36%	35%
NDP	13%	13%	14%
Green	5%	10%	9%
Bloc	6%	6%	7%
PPC/Other	1%	4%	7%

Ambivalent

	Oct '16	Sept '19 W1	Sept '19 W2
Liberal	47%	32%	37%
Conservative	22%	31%	23%
NDP	19%	16%	16%
Green	8%	14%	13%
Bloc	4%	4%	6%
PPC/Other	1%	3%	5%

Alienated

	Oct '16	Sept '19 W1	Sept '19 W2
Liberal	40%	36%	38%
Conservative	19%	24%	24%
NDP	21%	17%	19%
Green	13%	15%	13%
Bloc	3%	2%	2%
PPC/Other	3%	7%	5%
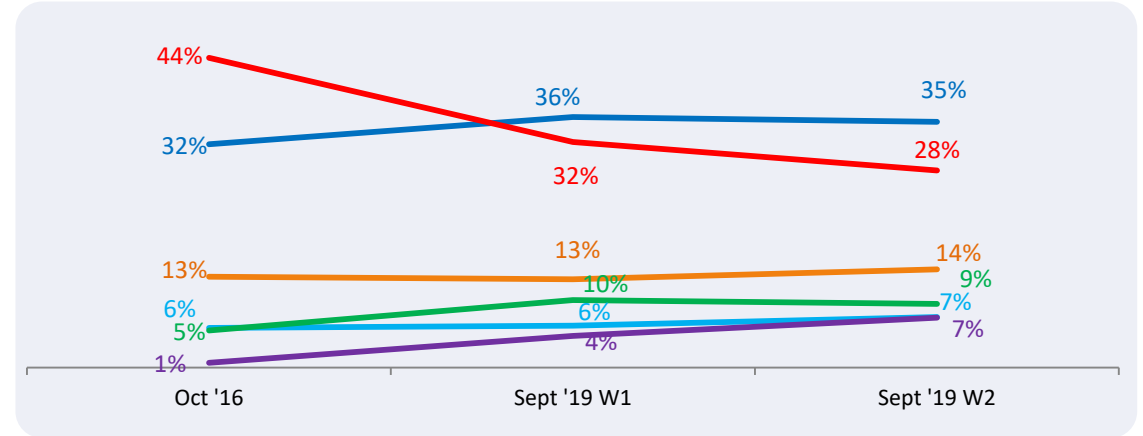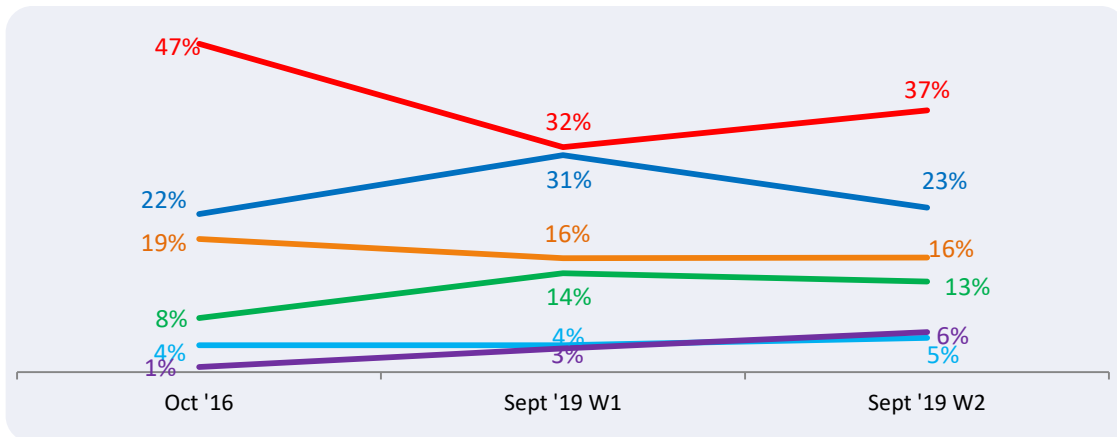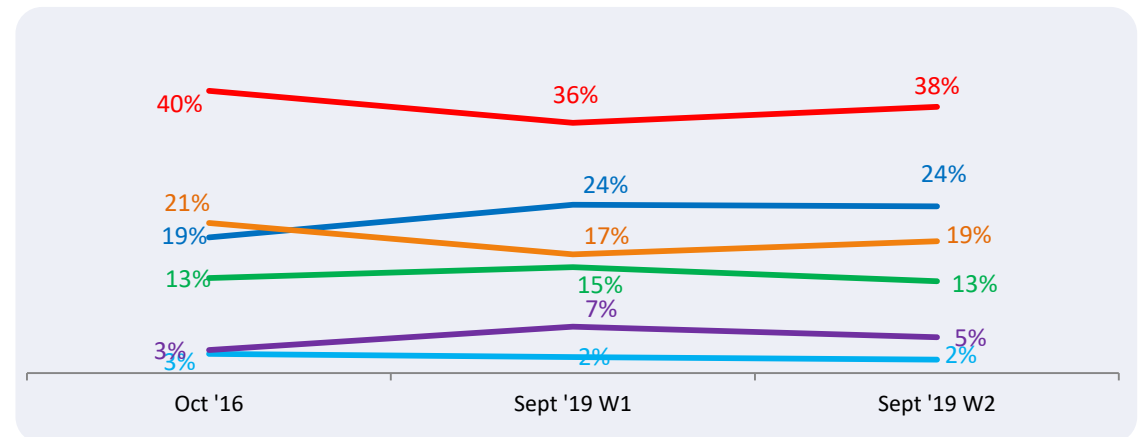
Decided vote: Liberal Conservative NDP Green Bloc PPC/Other

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

INNOVATIVE
RESEARCH GROUP

Environment versus Economy: Respondents are split on whether to prioritize the environment (44%) or the economy (45%)

Q When it comes to trade-offs between the environment or the economy, which is more important to you?
[asked of all respondents; n=1,600]

2016

45%

42%

47%

11%

■ The economy
■ The environment
■ Don't know

2019

45%

44%

12%

INNOVATIVE
RESEARCH GROUP
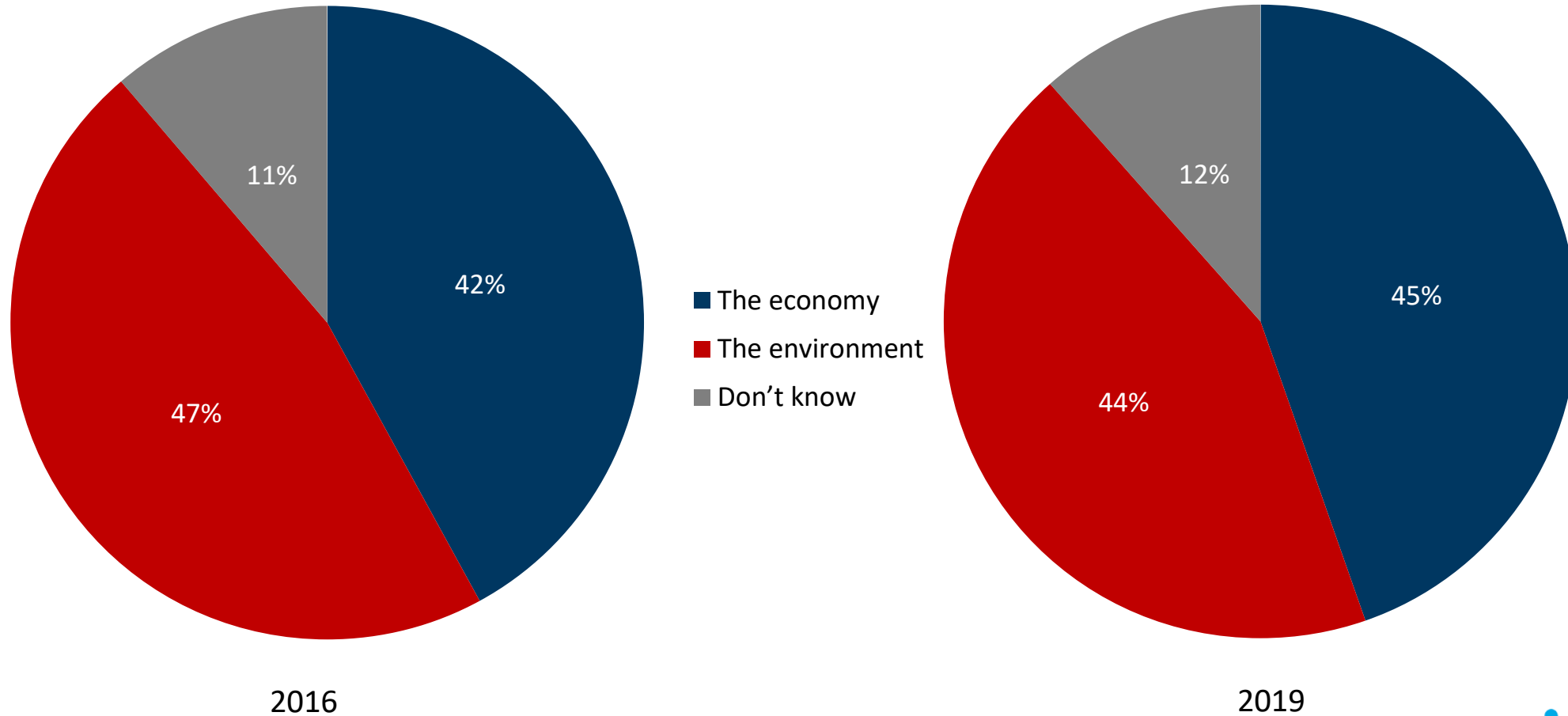
Combined Vote by Environment versus Economy: Conservative lead among those who want to prioritize the economy up since 2016

Q Combined Vote by: When it comes to trade-offs between the environment or the economy, which is more important to you?
[asked of all respondents; n=1,600]

Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc Quebecois ■ Green ■ PPC ■ Other ■ Undecided ■ Would not vote

The Economy
- 2019: Conservative 40%, Liberal 28%, NDP 11%, Bloc Quebecois 2%, Green 5%, PPC 3%, Other 1%, Undecided 8%, Would not vote 2%
- 2016: Conservative 41%, Liberal 36%, NDP 8%, Bloc Quebecois 2%, Green 2%, PPC 1%, Other 1%, Undecided 8%, Would not vote 1%

Don't Know
- 2019: Conservative 23%, Liberal 22%, NDP 8%, Bloc Quebecois 2%, Green 4%, PPC 2%, Other 1%, Undecided 28%, Would not vote 9%
- 2016: Conservative 23%, Liberal 36%, NDP 6%, Bloc Quebecois 2%, Green 3%, Other 1%, Undecided 23%, Would not vote 6%

The Environment
- 2019: Conservative 16%, Liberal 35%, NDP 14%, Bloc Quebecois 6%, Green 15%, PPC 4%, Other 1%, Undecided 9%, Would not vote 3%
- 2016: Conservative 9%, Liberal 48%, NDP 16%, Bloc Quebecois 4%, Green 10%, Other 1%, Undecided 9%, Would not vote 2%

INNOVATIVE
RESEARCH GROUP

Immigration: Respondents are split; 46% say that newcomers threaten traditional values while 43% say they strengthen society

Q **Which of the following statements best describes your personal point of view?**
[asked of all respondents; n=1,600]

42%

46%

12%

■ The growing number of newcomers from other countries threaten traditional Canadian customs and values

■ The growing number of newcomers from other counries strengthens Canadian society

■ Don't know

46%

43%

12%

2016

2019

INNOVATIVE
RESEARCH GROUP

Combined Vote by Immigration: Even among those worried about immigration, only 5% would vote for the PPC

Q Combined Vote by: Which of the following statements best describes your personal point of view?
[asked of all respondents; n=1,600]

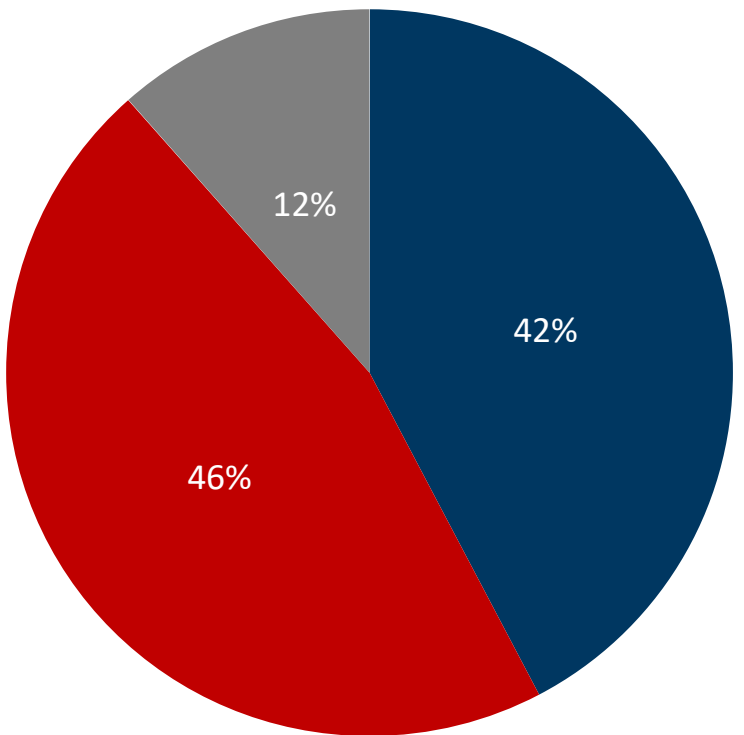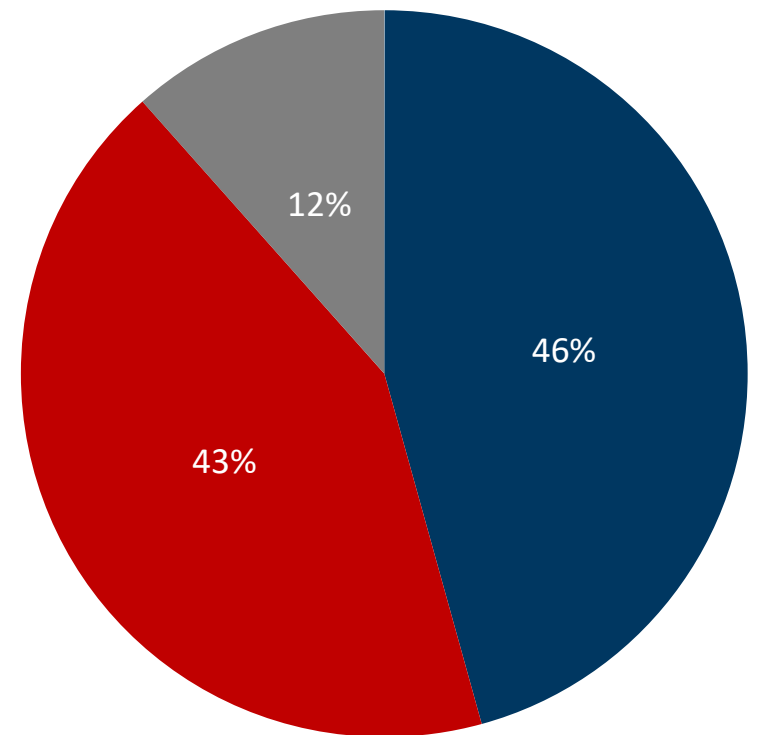Legend: ■ Conservative ■ Liberal ■ NDP ■ Bloc Quebecois ■ Green ■ PPC ■ Other ■ Undecided ■ Would not vote

The growing number of newcomers from other countries threaten traditional Canadian customs and values

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	39%	21%	9%	5%	7%	5%	1%	10%	3%
2016	38%	27%	10%	5%	5%		2%	11%	2%

Don't Know

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	20%	23%	12%	1%	9%	1%	0%	24%	10%
2016	22%	34%	7%	2%	6%		1%	24%	3%
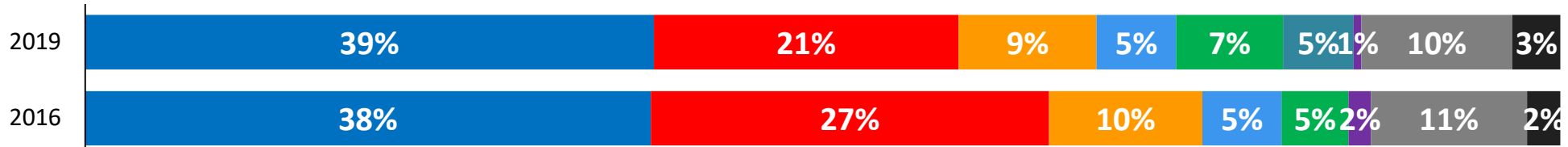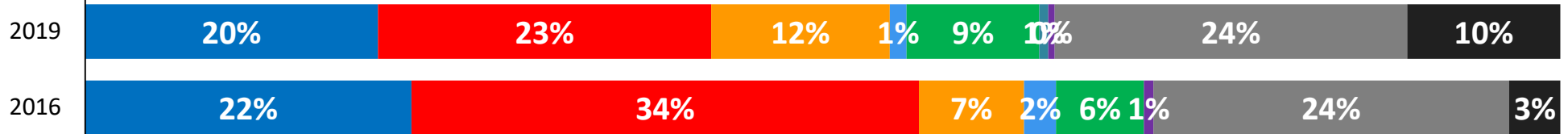
The growing number of newcomers from other countries strengthens Canadian society

Year	Conservative	Liberal	NDP	Bloc Quebecois	Green	PPC	Other	Undecided	Would not vote
2019	18%	42%	15%	3%	11%	2%	0%	8%	1%
2016	12%	57%	14%	1%	7%		1%	6%	2%

INNOVATIVE RESEARCH GROUP

Two horse race: A majority agree that the election is really a race between the Conservatives and Liberals

Q Do you agree or disagree with the following statements? This election is really a race between the Conservatives and the Liberals. [asked of all respondents; n=1,600]
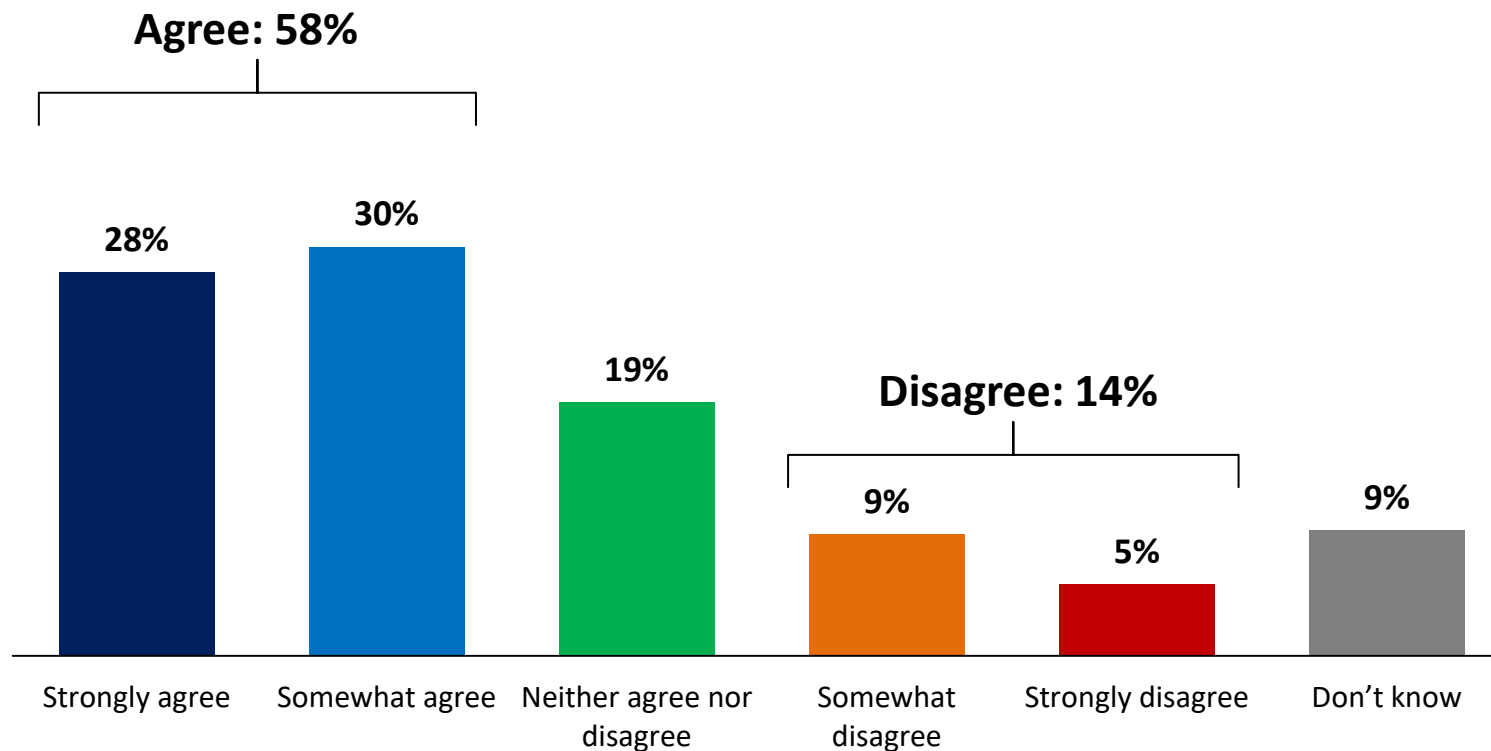
Net Agreement: +44%

Agree: 58%

28% — Strongly agree
30% — Somewhat agree
19% — Neither agree nor disagree

Disagree: 14%

9% — Somewhat disagree
5% — Strongly disagree
9% — Don't know

Party ID Segmentation
Net agreement

Conservative	+66%
Liberal	+58%
NDP	+26%
Bloc	+42%
Green	+13%
PPC/Other	+23%
Unaligned	+26%

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

INNOVATIVE RESEARCH GROUP
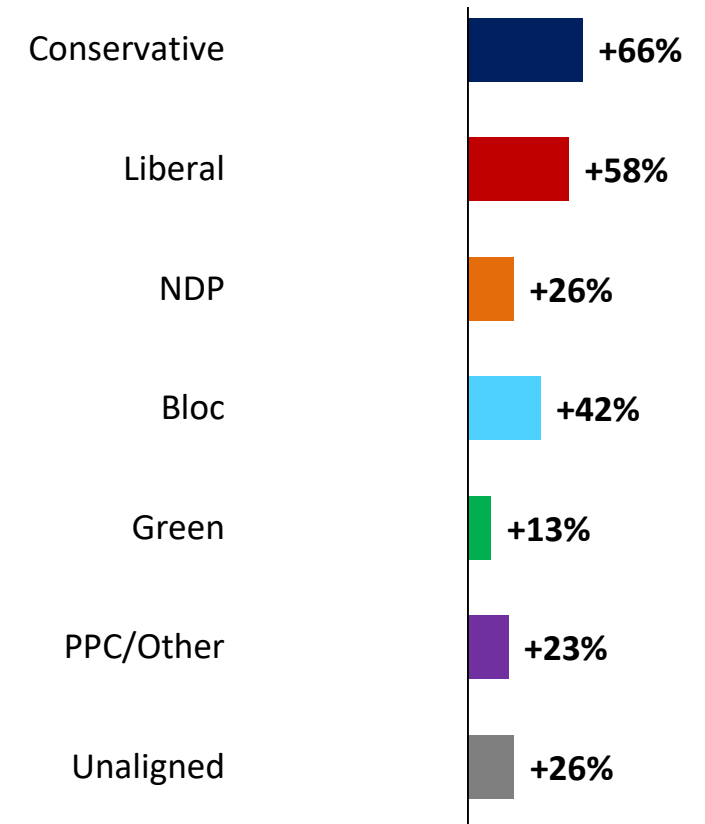
Keeping the Conservatives Out: Respondents divided on whether or not the most important thing in this election is to keep CPC out

Q Do you agree or disagree with the following statements? The most important thing in this election is to keep the Conservatives out of government. [asked of all respondents; n=1,600]
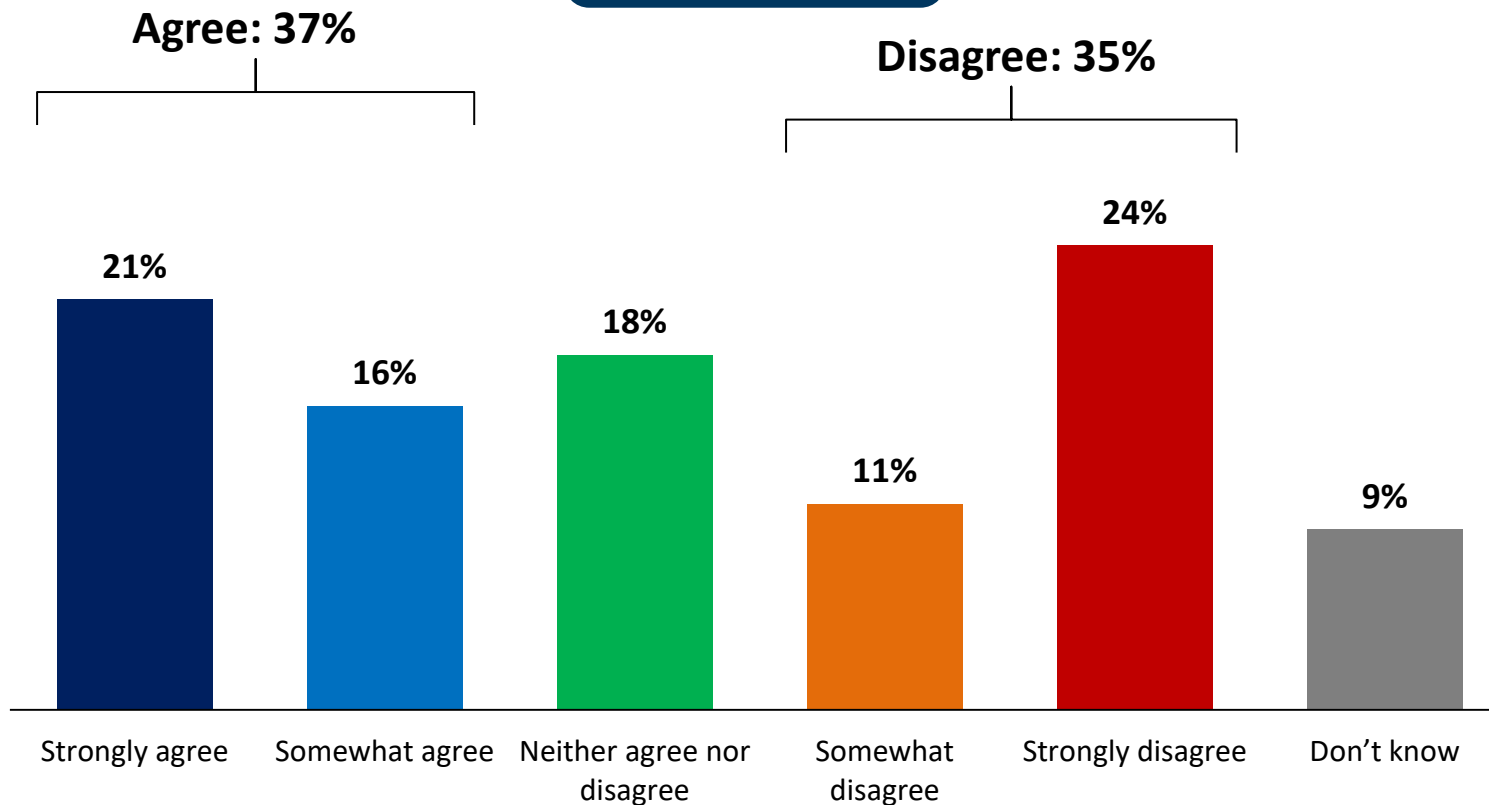
Net Agreement: +2%

Agree: 37%

Disagree: 35%

- Strongly agree: 21%
- Somewhat agree: 16%
- Neither agree nor disagree: 18%
- Somewhat disagree: 11%
- Strongly disagree: 24%
- Don't know: 9%

Party ID Segmentation
Net agreement

- Conservative: -68%
- Liberal: +46%
- NDP: +47%
- Bloc: +12%
- Green: +29%
- PPC/Other: +8%
- Unaligned: -7%

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

INNOVATIVE RESEARCH GROUP
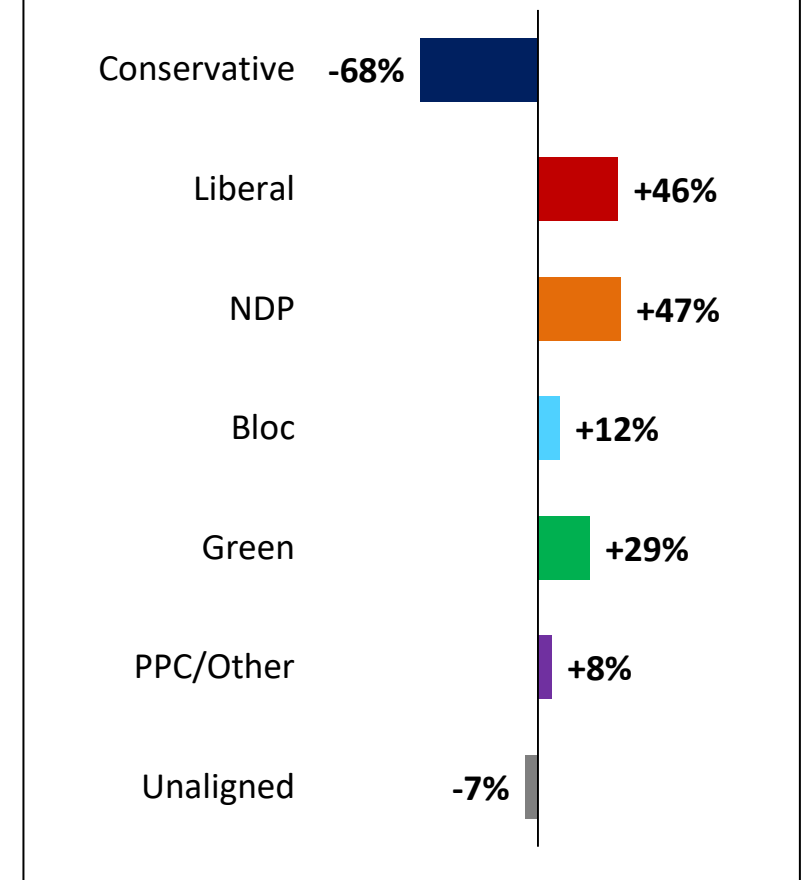
Fear of Ford: 46% of respondents say they are reluctant to vote for Andrew Scheer because of what Doug Ford has done

Q Do you agree or disagree with the following statements? I am reluctant to vote for Andrew Scheer because of what I've seen of Doug Ford's government in Ontario.
[asked of all respondents; n=1,600]

Net Agreement: +21%
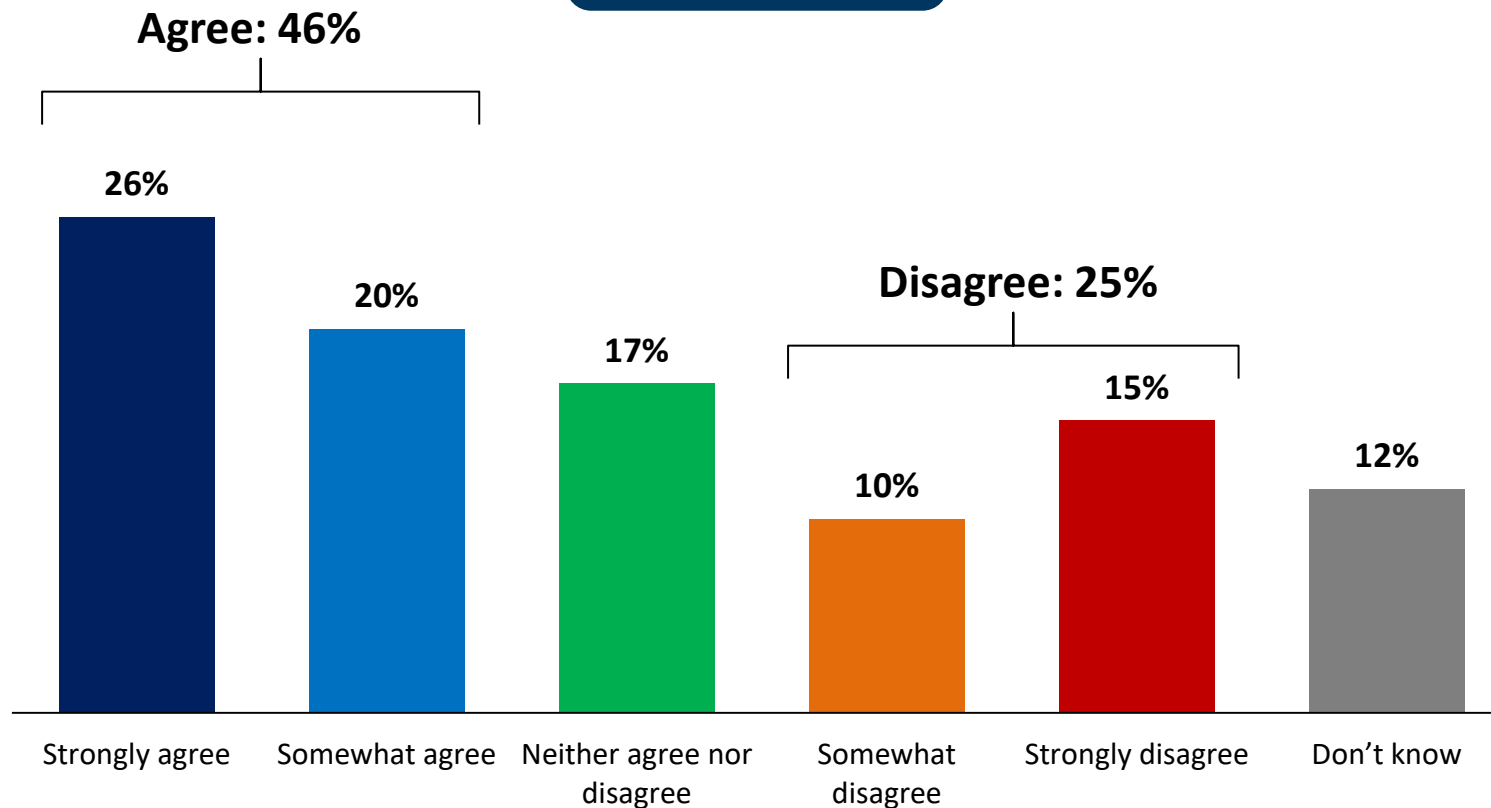
Agree: 46%

Disagree: 25%

- Strongly agree: 26%
- Somewhat agree: 20%
- Neither agree nor disagree: 17%
- Somewhat disagree: 10%
- Strongly disagree: 15%
- Don't know: 12%

Party ID Segmentation
Net agreement

Party	Net agreement
Conservative	-45%
Liberal	+53%
NDP	+61%
Bloc	+48%
Green	+39%
PPC/Other	+33%
Unaligned	+19%

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

INNOVATIVE RESEARCH GROUP
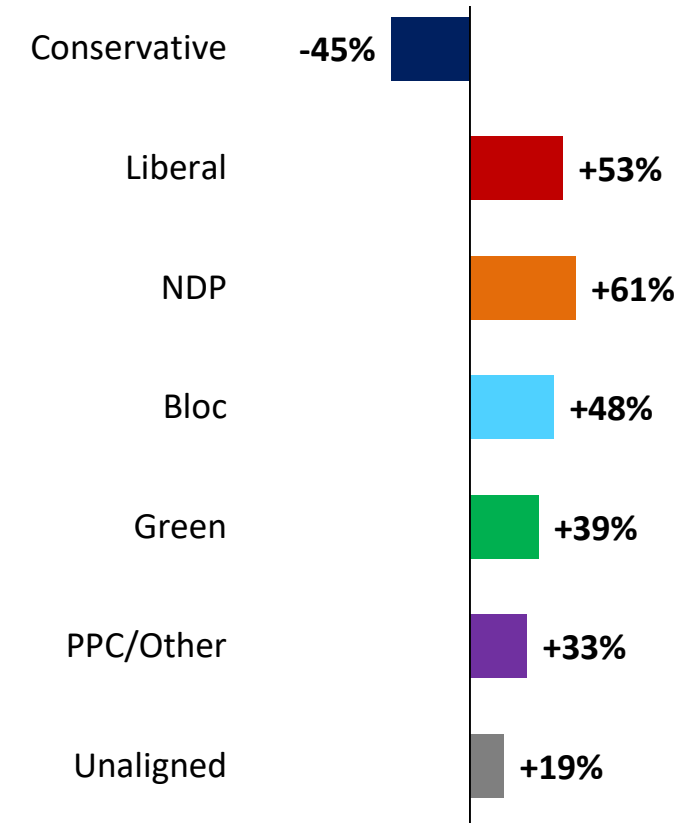
Ford and Kenney: A majority agree that we need a federal government to stand up to the influence of politicians like Doug Ford and Jason Kenney

Q Do you agree or disagree with the following statements? We need a federal government that will stand up to the negative influence of provincial politicians like Doug Ford and Jason Kenney.
[asked of all respondents; n=1,600]
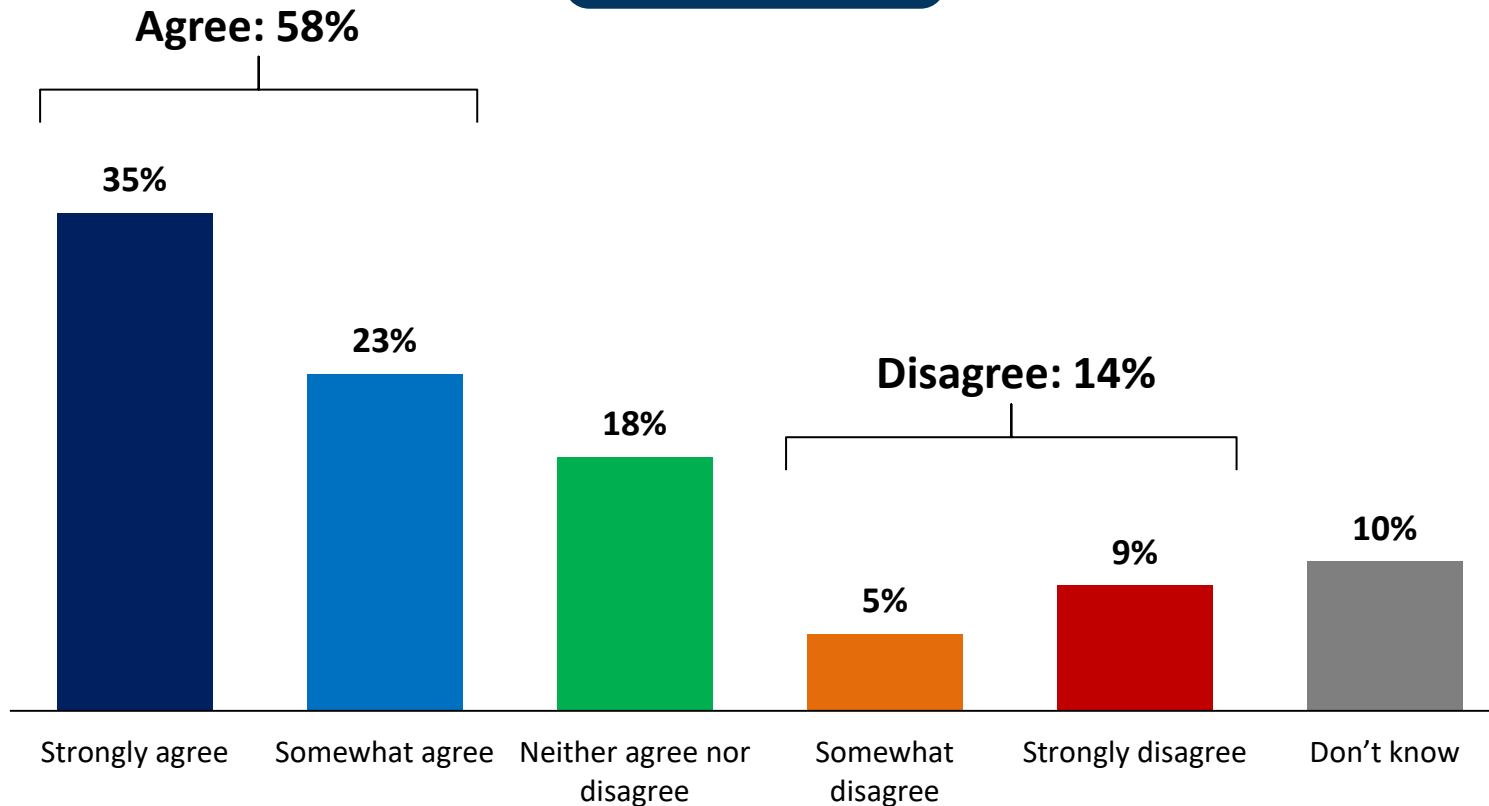
Net Agreement: +44%

Agree: 58%

Disagree: 14%

- Strongly agree: **35%**
- Somewhat agree: **23%**
- Neither agree nor disagree: **18%**
- Somewhat disagree: **5%**
- Strongly disagree: **9%**
- Don't know: **10%**

Party ID Segmentation
Net agreement

- Conservative: **1%**
- Liberal: **70%**
- NDP: **75%**
- Bloc: **49%**
- Green: **58%**
- PPC/Other: **41%**
- Unaligned: **38%**

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

INNOVATIVE
RESEARCH GROUP
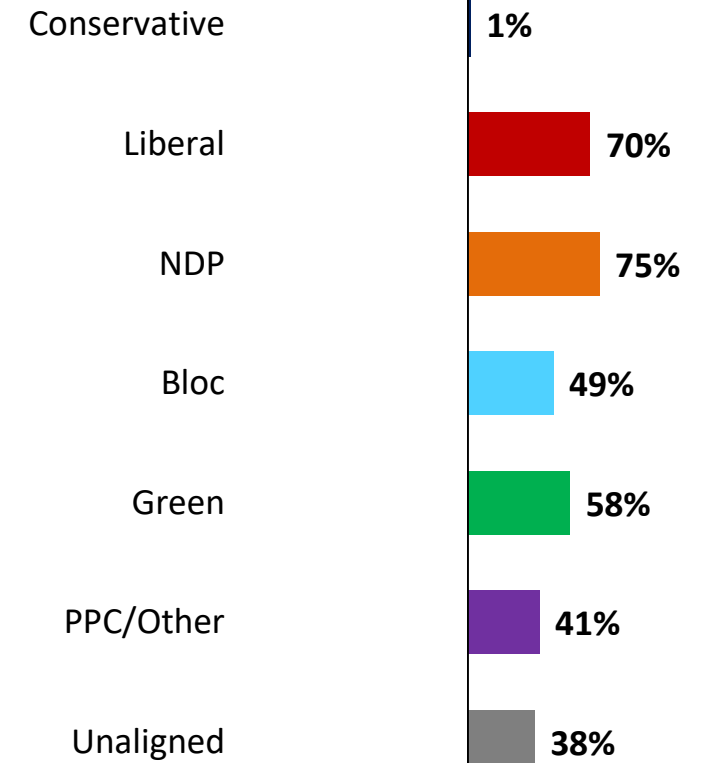
Trans Mountain (July)

Support for Resource Development Infrastructure: Support is higher for natural gas pipelines than any oil-related infrastructure

Q Generally speaking, would your initial reaction be to support or oppose a proposal to build each of the following projects?
[asked of all respondents, n=1,200]

Net Support

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
Natural Gas pipelines	29%	26%	17%	9%	8%	10%	+37%
Oil and Petroleum Products pipelines	26%	24%	17%	10%	13%	10%	+28%
Port facilities for oil tankers	23%	23%	19%	12%	12%	11%	+22%
Oil-storage tank farms and terminals	20%	23%	20%	12%	12%	12%	+19%

■ Strongly support ■ Somewhat support ■ Neither support nor oppose

■ Somewhat oppose ■ Strongly oppose ■ Don't know

INNOVATIVE
RESEARCH GROUP

Pipeline Support: Half support both oil and gas pipeline projects with a quarter as strong supporters and another quarter as soft supporters

Based on respondents support for both natural gas and oil pipelines, they were grouped into similar segments for analysis.

Opponents of oil and gas pipelines
16%

Strong supporters of oil and gas pipelines
24%

Ambivalent
22%

Soft supporters of oil and gas pipelines
23%

Conflicted
15%

INNOVATIVE
RESEARCH GROUP
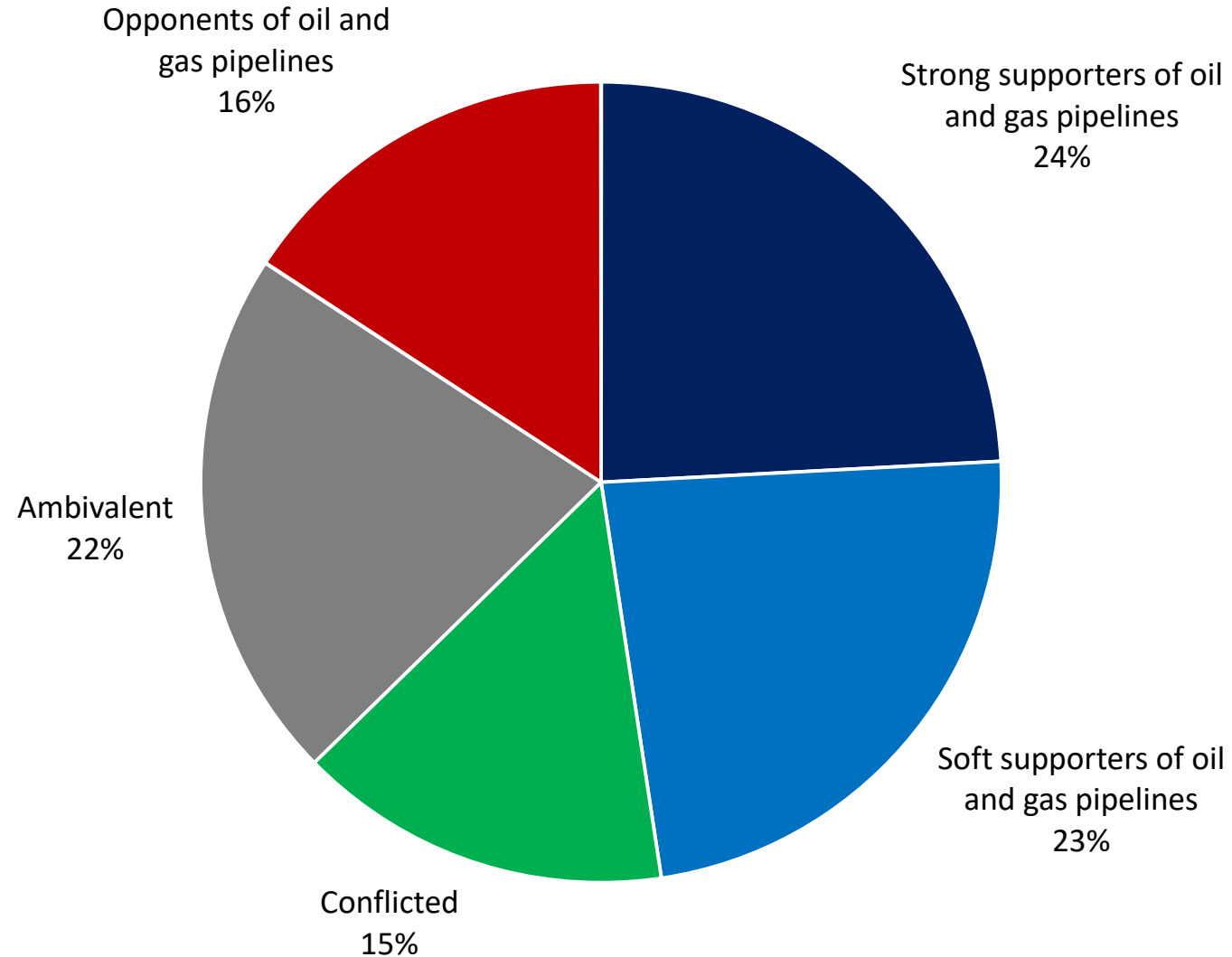
Pipeline Support: Majority of Conservatives and Liberals are supporters of pipeline projects

Pipeline Support **BY** Party ID and Region

Party ID

	Strong supporters	Soft supporters	Conflicted	Ambivalent	Opponents
Liberal	21%	31%	16%	18%	12%
CPC	50%	27%	8%	10%	5%
NDP	8%	17%	21%	22%	32%
Green/Other	16%	21%	20%	13%	31%
Unaligned	14%	16%	15%	39%	16%

Region

	Strong supporters	Soft supporters	Conflicted	Ambivalent	Opponents
BC	23%	21%	17%	16%	23%
AB	55%	19%	11%	13%	2%
Prairies	32%	20%	15%	22%	11%
ON	23%	26%	14%	21%	16%
QC	11%	19%	19%	28%	22%
Atlantic	17%	40%	10%	28%	6%

- ■ Strong supporters of oil and gas pipelines
- ■ Soft supporters of oil and gas pipelines
- ■ Conflicted
- ■ Ambivalent
- ■ Opponents of oil and gas pipelines

INNOVATIVE RESEARCH GROUP

Approval: Net support for the pipeline approval is up since September 2018 from +22% to +31%

Q In 2016, the federal government announced it approved the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline). Thinking about that decision, do you support or oppose the federal government decision to approve the Kinder Morgan oil pipeline expansion from Edmonton to Burnaby, BC (the Trans Mountain pipeline)?
[asked of all respondents, n=1,200]

Net Support

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
Jun-19	29%	22%	16%	8%	12%	13%	+31%
Sep-18	26%	20%	16%	9%	15%	14%	+22%
Jun-18	27%	20%	17%	10%	15%	11%	+22%
May-18	29%	21%	18%	10%	11%	12%	+29%

■ Strongly support ■ Somewhat support ■ Neither support nor oppose
■ Somewhat oppose ■ Strongly oppose ■ Don't know

INNOVATIVE RESEARCH GROUP

Note: First sentence was not listed as a preamble to this question before September 2018.

Support for Renewed Approval: A majority (52%) support the renewed approval after additional consultations

Q The federal government has now completed an additional consultation with First Nations. Several weeks ago, the federal government announced that process is completed and, after an additional review by Cabinet, renewed its approval to build the expansion with eight additional conditions to address First Nations concerns.

Do you support or oppose the federal government's decision to renew its approval of the Trans Mountain Pipeline expansion?

[asked of all respondents, n=1,200]

Support:
52%

28% | 24%

Oppose:
17%

17% | 7% | 10% | 14%

| Net Support: +34% |

Strongly support | Somewhat support | Neither support nor oppose | Somewhat oppose | Strongly oppose | Don't know
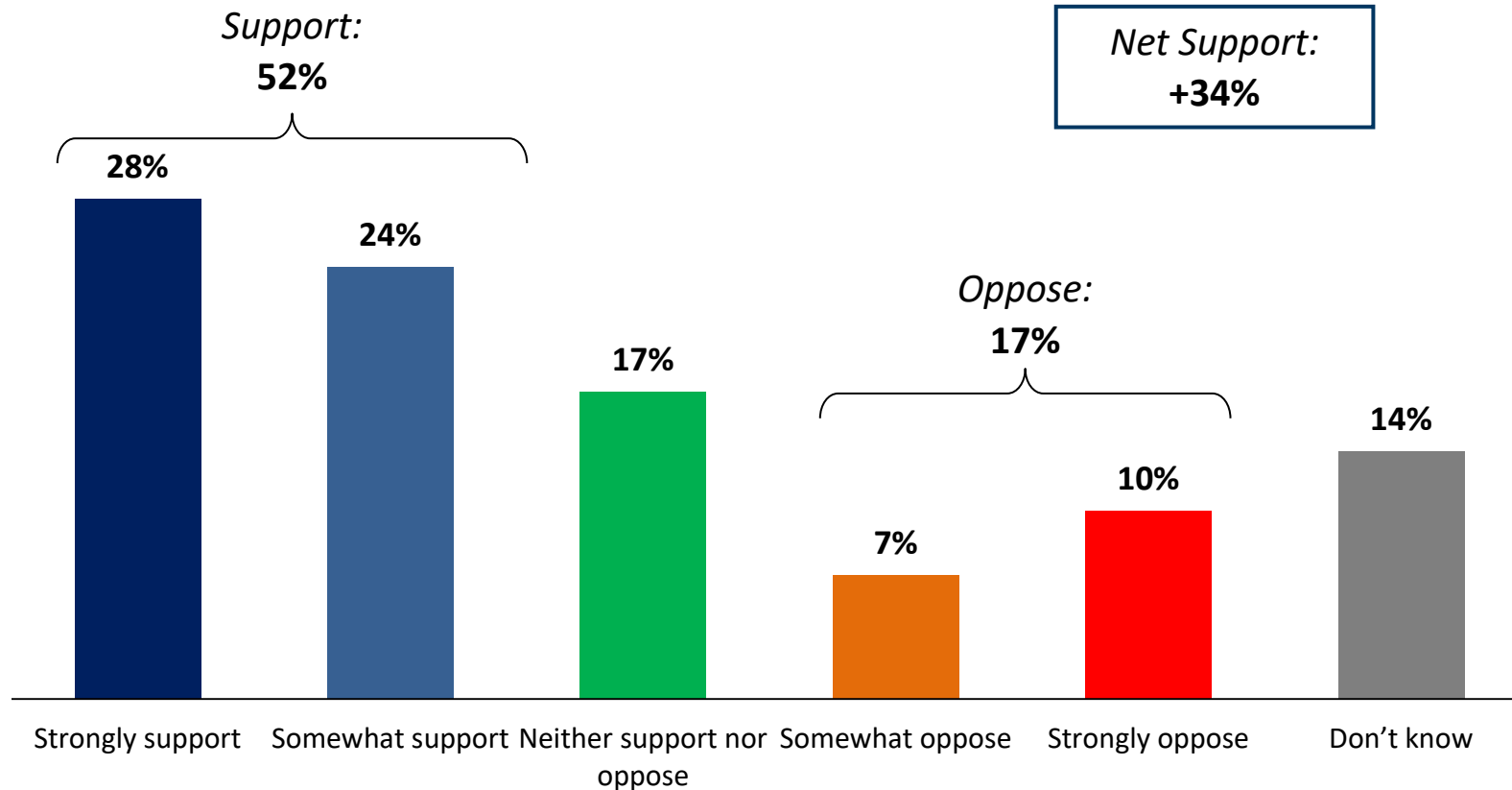
Sample Breakdown ▶▶
Percentage who say 'Support'

Party ID

Liberal	64%
Conservative	73%
NDP	33%
Green/Bloc/Other	40%
Undecided/Would not vote	33%

Region

BC	48%
Alberta	76%
Prairies	49%
Ontario	55%
Quebec	36%
Atlantic	57%

INNOVATIVE
RESEARCH GROUP
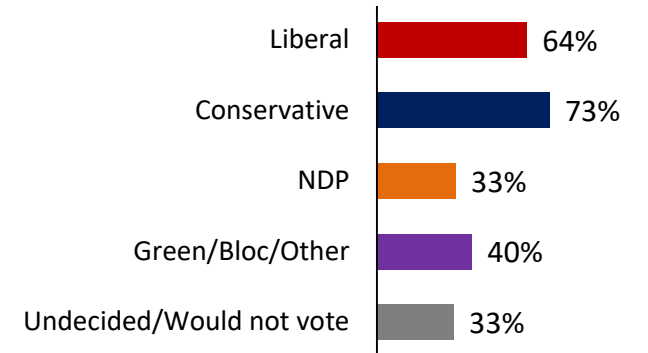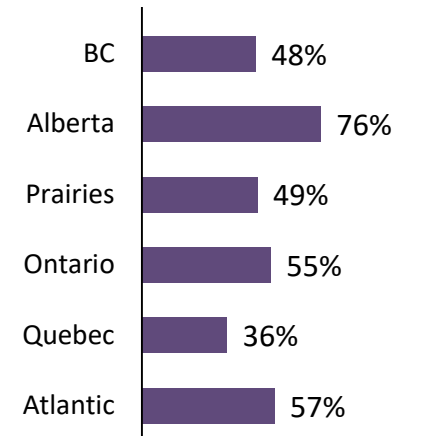
Support for Renewed Approval: A majority of Liberals and Conservatives support the renewed approval

Q Do you support or oppose the federal government's decision to renew its approval of the Trans Mountain Pipeline expansion?
BY Party ID and Region

Net Support

Party ID

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
Liberal	30%	33%	17%	6%	7%	7%	**+52%**
CPC	50%	24%	13%	3%	5%	6%	**+66%**
NDP	12%	21%	18%	9%	29%	10%	**-5%**
Green/Other	19%	21%	21%	10%	20%	9%	**+11%**
Unaligned	16%	17%	19%	9%	8%	31%	**+15%**

Region

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
BC	29%	20%	15%	8%	20%	9%	**+20%**
AB	55%	21%	9%	3%	4%	7%	**+69%**
Prairies	28%	21%	20%	5%	10%	16%	**+35%**
ON	28%	27%	16%	6%	9%	14%	**+40%**
QC	16%	20%	22%	10%	13%	19%	**+13%**
Atlantic	22%	34%	21%	5%	4%	14%	**+48%**

■ Strongly support　　■ Somewhat support　　■ Neither support nor oppose
■ Somewhat oppose　　■ Strongly oppose　　■ Don't know

INNOVATIVE RESEARCH GROUP

Carbon Tax (April)

General Support for Carbon Tax: A majority in Toronto support a carbon tax, while support in the rest of the GTA is more evenly split

Q Do you support or oppose the federal government implementing the following policy?
Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.
[asked of all respondents; n=2,000]

Net Support

Region	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
BC	20%	23%	18%	11%	21%	6%	+11%
Alberta	17%	17%	15%	11%	31%	10%	-8%
Prairies	17%	16%	17%	14%	24%	13%	-5%
Toronto	35%	28%	17%	5%	11%	5%	+47%
905	23%	21%	17%	8%	21%	9%	+15%
Rest of Ontario	25%	18%	13%	11%	27%	6%	+5%
Quebec	26%	21%	21%	9%	12%	12%	+27%
Atlantic	16%	20%	19%	9%	26%	10%	0%

■ Strongly support   ■ Somewhat support   ■ Neither support nor oppose
■ Somewhat oppose   ■ Strongly oppose   ■ Don't know

INNOVATIVE RESEARCH GROUP
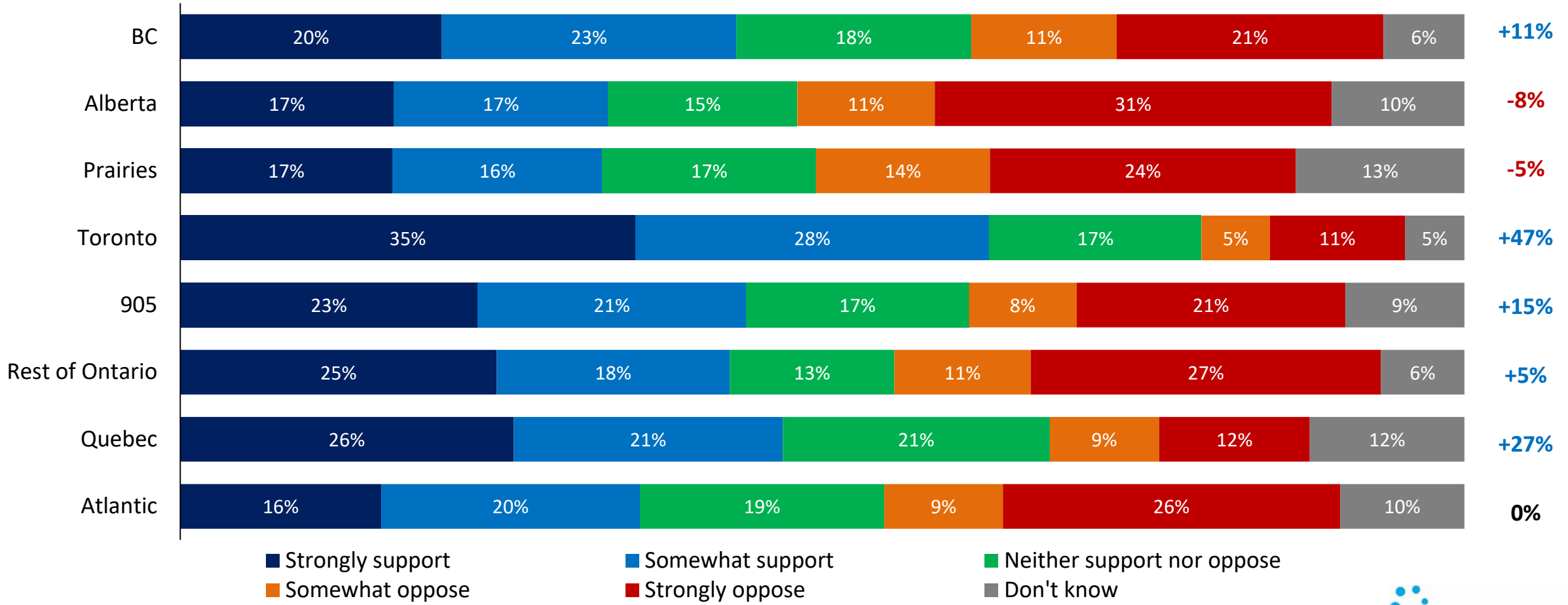
General Support for Carbon Tax: Net support positive in all groups except CPC partisans and Populist Conservatives

Q Do you support or oppose the federal government implementing the following policy?
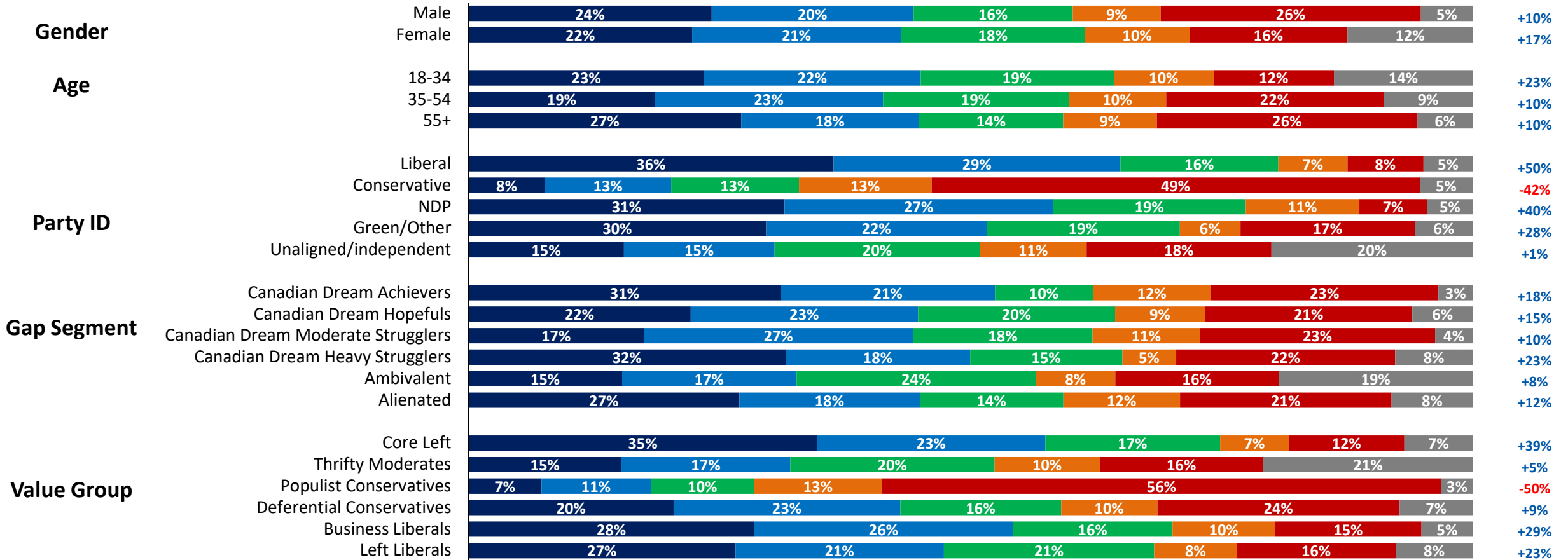Establish a national minimum price for carbon and, in provinces that fail to meet that national minimum price, the federal government will introduce a carbon tax in that province where the money raised by that tax is returned to that provincial government.
[asked of all respondents; n=2,000]

Net Support

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
Gender							
Male	24%	20%	16%	9%	26%	5%	+10%
Female	22%	21%	18%	10%	16%	12%	+17%
Age							
18-34	23%	22%	19%	10%	12%	14%	+23%
35-54	19%	23%	19%	10%	22%	9%	+10%
55+	27%	18%	14%	9%	26%	6%	+10%
Party ID							
Liberal	36%	29%	16%	7%	8%	5%	+50%
Conservative	8%	13%	13%	13%	49%	5%	-42%
NDP	31%	27%	19%	11%	7%	5%	+40%
Green/Other	30%	22%	19%	6%	17%	6%	+28%
Unaligned/independent	15%	15%	20%	11%	18%	20%	+1%
Gap Segment							
Canadian Dream Achievers	31%	21%	10%	12%	23%	3%	+18%
Canadian Dream Hopefuls	22%	23%	20%	9%	21%	6%	+15%
Canadian Dream Moderate Strugglers	17%	27%	18%	11%	23%	4%	+10%
Canadian Dream Heavy Strugglers	32%	18%	15%	5%	22%	8%	+23%
Ambivalent	15%	17%	24%	8%	16%	19%	+8%
Alienated	27%	18%	14%	12%	21%	8%	+12%
Value Group							
Core Left	35%	23%	17%	7%	12%	7%	+39%
Thrifty Moderates	15%	17%	20%	10%	16%	21%	+5%
Populist Conservatives	7%	11%	10%	13%	56%	3%	-50%
Deferential Conservatives	20%	23%	16%	10%	24%	7%	+9%
Business Liberals	28%	26%	16%	10%	15%	5%	+29%
Left Liberals	27%	21%	21%	8%	16%	8%	+23%

■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know
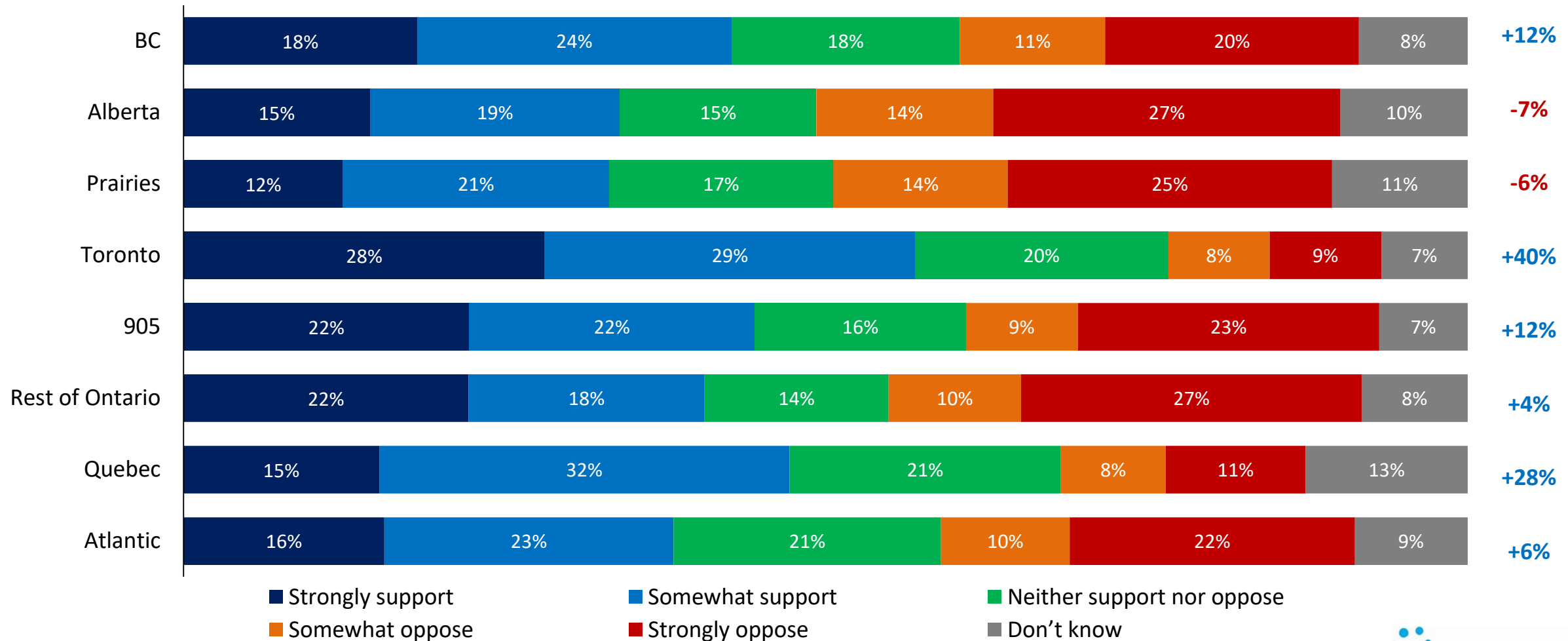
INNOVATIVE RESEARCH GROUP

Policy Support: Support for the federal government's implementation of the carbon tax is highest in Toronto and Quebec

Q Now you know the details of the federal government's carbon price policy, do you support or oppose that policy?
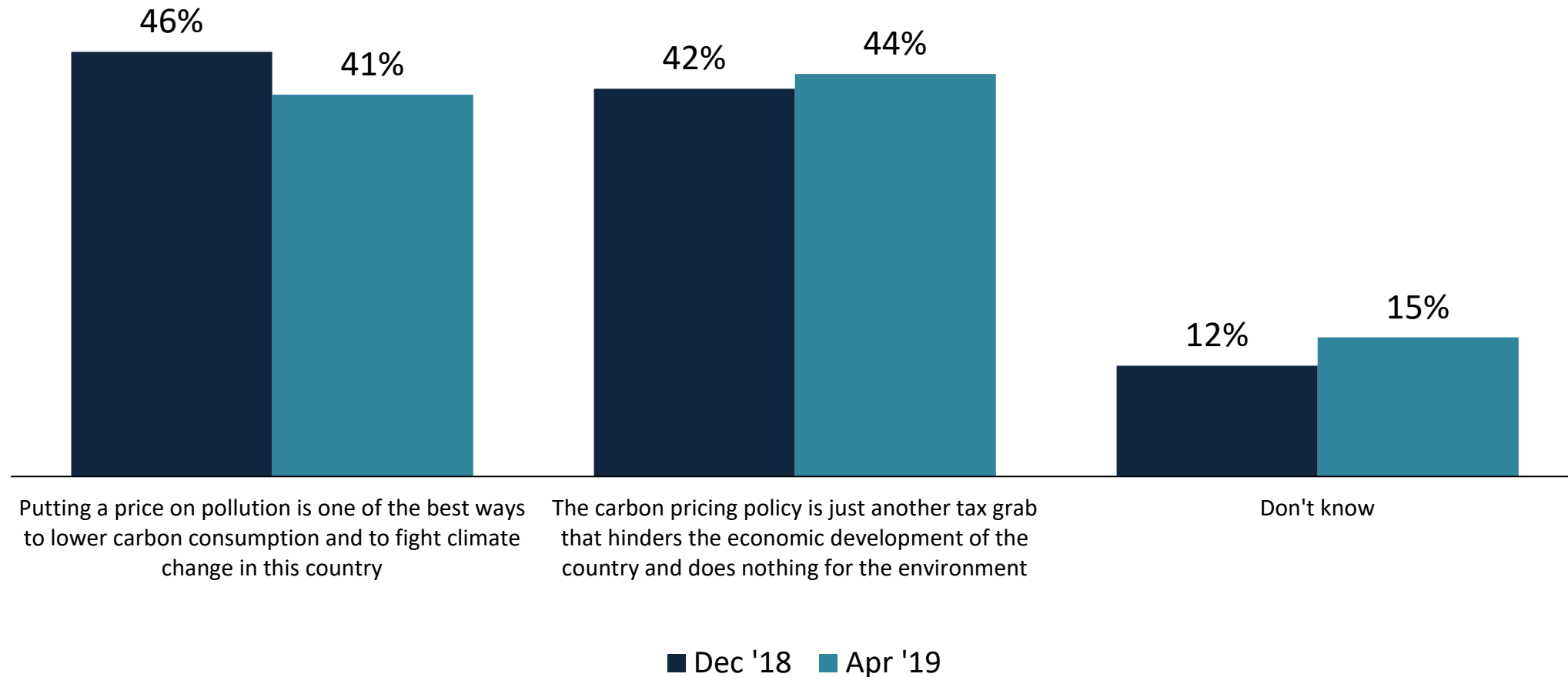[asked of all respondents; n=2,000]

Net Support

Region	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
BC	18%	24%	18%	11%	20%	8%	+12%
Alberta	15%	19%	15%	14%	27%	10%	-7%
Prairies	12%	21%	17%	14%	25%	11%	-6%
Toronto	28%	29%	20%	8%	9%	7%	+40%
905	22%	22%	16%	9%	23%	7%	+12%
Rest of Ontario	22%	18%	14%	10%	27%	8%	+4%
Quebec	15%	32%	21%	8%	11%	13%	+28%
Atlantic	16%	23%	21%	10%	22%	9%	+6%

■ Strongly support ■ Somewhat support ■ Neither support nor oppose
■ Somewhat oppose ■ Strongly oppose ■ Don't know

INNOVATIVE RESEARCH GROUP

Perception of Carbon Pricing Policy: Slight drop in feeling that carbon pricing is one of the best ways to fight climate change

Q Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?
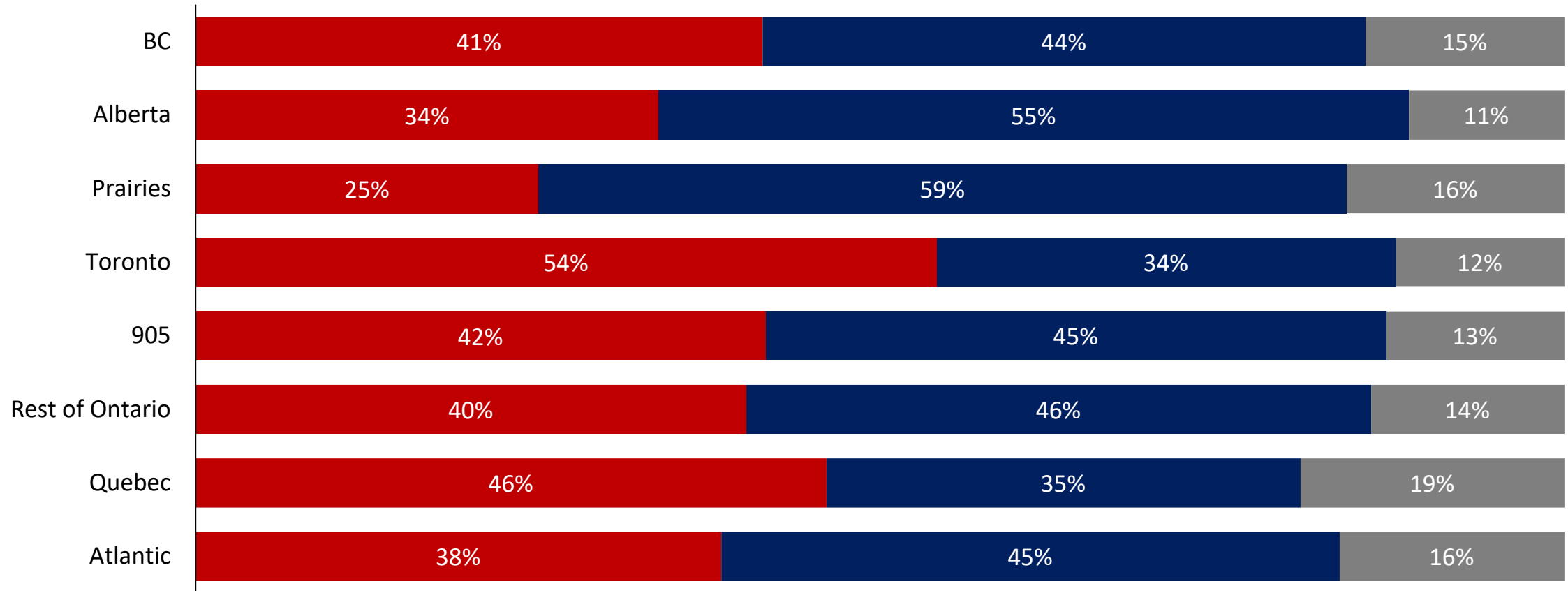
[asked of all respondents; n=2,000]

Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country
- Dec '18: 46%
- Apr '19: 41%

The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing for the environment
- Dec '18: 42%
- Apr '19: 44%

Don't know
- Dec '18: 12%
- Apr '19: 15%

■ Dec '18 ■ Apr '19

INNOVATIVE RESEARCH GROUP

Perceptions of Carbon Pricing Policy: Respondents in the 905 are evenly split on their perception of carbon pricing

Q Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?

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

Region	Putting a price on pollution	Tax grab	Don't know
BC	41%	44%	15%
Alberta	34%	55%	11%
Prairies	25%	59%	16%
Toronto	54%	34%	12%
905	42%	45%	13%
Rest of Ontario	40%	46%	14%
Quebec	46%	35%	19%
Atlantic	38%	45%	16%

■ Putting a price on pollution is one of the best ways to lower carbon consumption and to fight climate change in this country
■ The carbon pricing policy is just another tax grab that hinders the economic development of the country and does nothing
■ Dont know

INNOVATIVE
RESEARCH GROUP

Summary

1. Despite the Blackface and SNC Lavalin controversies, the Liberals are leading in this election.

2. The Liberal have a brand advantage and they have a distribution advantage.

3. The NDP collapse is also aiding the Liberals by providing gains among left wing voters and creating opportunities to add seats to offset losses to the CPC.

4. Scheer's personal brand has been losing ground in the campaign.

5. We have not yet measured the impact of the climate march. But prior to the March policy support for a carbon tax slips once we look at competing political narratives. In fact, a climate change election may be Andrew Scheer's best hope.

6. Pipelines are not a direct threat to the Liberals. However, jailing protesters immediately before election could suppress Liberal vote and leave last minute progressive switchers voting Green, Bloc or NDP.

INNOVATIVE
RESEARCH GROUP

Building Understanding.

Personalized research to connect you and your audiences.

For more information, please contact:

Greg Lyle
President
(t) 416-642-6429
(e) glyle@innovativeresearch.ca