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WHAT IS REALLY GOING ON WITH THE FEDERAL POLITICAL LANDSCAPE?

A CAREFUL LOOK AT THE FAULT LINES AND TRAJECTORIES

[Ottawa – April 11, 2014] Using an unusually large random probability sample (4,134 Canadian adults), which covers the on- and offline segments of Canada's population, as well as both those who rely on landlines and cell phones, we can chart where the voter landscape is right now. Our data also provide methods for analyzing voter mobility since the last election. Coupled with basic barometers of approval and dominant issue tracking, we can get an excellent fix on where the voters are today and how they arrived where they are today. As the horizon of the 42nd election comes into view, we can also speculate as to what the prospects are for the various parties. There are some clear areas of advantage and disadvantage, but there is nothing approaching clarity about what is in store.

With the Liberals around 36 points, the Conservatives around 27, and the NDP around 22, the voter landscape is profoundly different that it was when the Conservatives gained a majority in May of 2011. Basically, both the NDP and the Conservatives have bled support to the reinvigorated Liberal Party. There is, however, a third leg to the stool which has propelled the Liberals to almost twice their support in 2011: the return of non-voters from 2011, which we are guessing were discouraged erstwhile Liberal supporters who could not summon the motivation to vote for the Ignatieff ticket and platform (see Figure 2).

This leads to some very important questions. First off, are the Liberals under Justin Trudeau re-establishing the previously coveted centre of Canadian politics which anointed them the crown of the natural governing party until about a decade ago? There is some evidence that this may be the case. The other less favourable interpretation for the Liberals is that there are some internal tensions in this constituency of arriviste from both left and right and that the emotional

HIGHLIGHTS

- **Federal vote intention:**
 - **35.8% Liberal Party**
 - **26.7% Conservative Party**
 - **21.8% NDP**
 - **8.1% Green Party**
 - **4.8% Bloc Québécois**
 - **2.7% Other**
- **Most important election issue:**
 - **34.4% Economic issues**
 - **30.8% Social issues**
 - **16.1% Ethics and accountability**
 - **11.0% Fiscal issues**
 - **7.8% Don't know/No response**
- **What to do if the Conservatives win the next election, but capture fewer than half the seats:**
 - **26% Liberal-led coalition with the NDP**
 - **24% NDP-led coalition with the Liberal Party**
 - **16% Conservative-Liberal coalition**
 - **23% The Conservatives should form government alone**
 - **11% Don't know/No response**

Please note that the methodology is provided at the end of this document.



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engagement to retain them, and to have the past discouraged voters actually show up for them may not be in place (yet). There is some plausibility to this hypothesis as well and recent federal elections have been won and lost on the dynamics of emotional engagement and turnout. These factors have strongly favoured the Conservatives in the past, but this is a different landscape with not much political capital left in the tank of the now eight-year-old administration.

Figure 1: Federal vote intention



Q. If a federal election were held tomorrow, which party would you vote for?

National Results



2011 Election Results



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 10.2% of respondents are undecided and 2.0% are ineligible to vote.

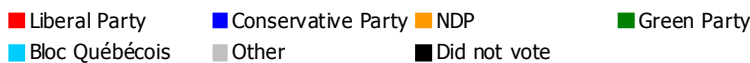
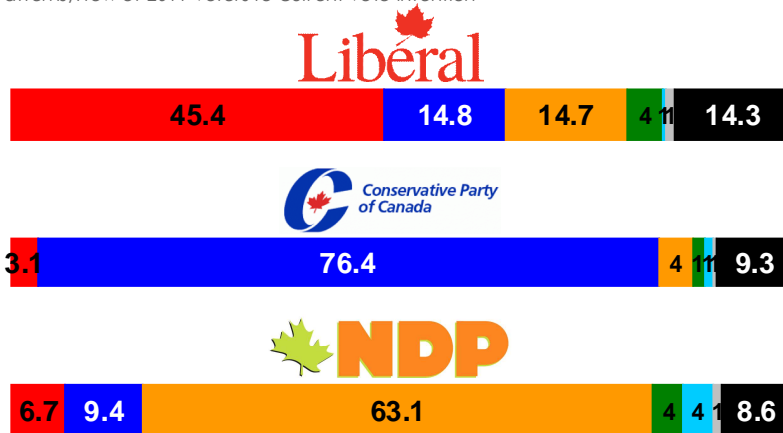
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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

Figure 2: Where are voters coming from?



Patterns/Flow of 2011 voters to current vote intention



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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

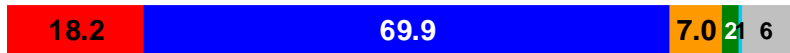
Figure 3: Where are supporters going? 

Q. If a federal election were held tomorrow, which party would you vote for?

Voted Liberal in 2011



Voted Conservative in 2011



Voted NDP in 2011



Did not vote in 2011







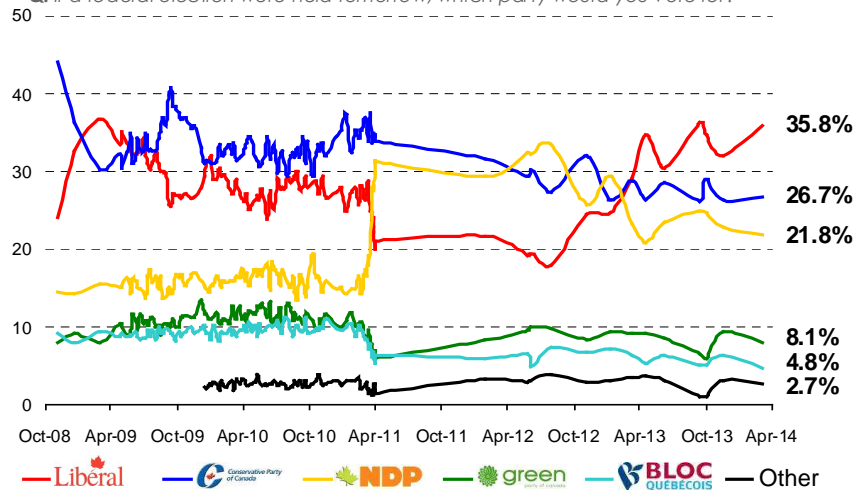



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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

Figure 4: Tracking vote intention 

Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 10.2% of respondents are undecided and 2.0% are ineligible to vote.

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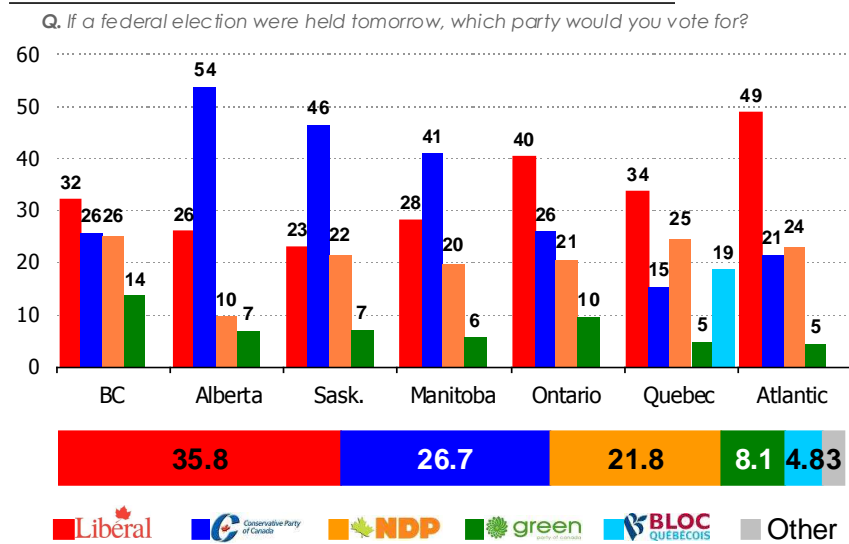
BASE: Canadians; most recent data point March 27-April 3, 2014 (n=4,134)

Figure 4 shows a couple of important things. First of all, there are some clear patterns and rhythms to the trends which suggest signal – rather than noise – is driving the trajectories. The clearest pattern is the Liberal rise which begins with Justin Trudeau’s arrival and has climbed pretty steadily since. Notably, the Liberals passed the Conservatives a year-and-a-half ago and haven’t come close to surrendering this now large lead since. This is not a blip and it is very different from the pattern the Liberals saw under Michael Ignatieff where they enjoyed a very brief honeymoon after his win at convention. He also showed another blip after the prorogation

brouhaha but that was pretty well it. The NDP and Conservatives have both been on the skids and those declines have accrued to the Liberals.

Turning to the demographic patterns underlying these movements, we see some interesting patterns. The Conservatives dominate the Prairies, while the Liberals lead in Quebec and Atlantic Canada. What is most astonishing, however, is the sizeable lead that the Liberals have built up in Ontario. The Liberals also have a small lead in British Columbia but, given the rather unpredictable nature of the province's political leanings, it would be unwise to place odds just yet.

Figure 5: Vote intention by region 



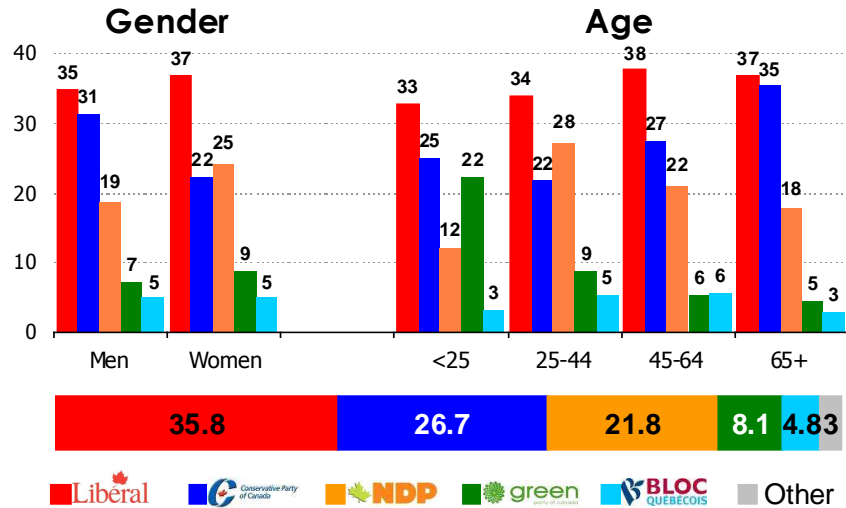
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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

The Liberals lead across all age groups, including youth where they have previously struggled to make headway. The Conservatives, however, enjoy a comparative advantage among seniors, which is a major advantage given that seniors tend to be the most reliable voting demographic in the country. The Conservatives do quite well with men, although they fairly poorly with women and the party would likely be reduced to third place in an alternate reality where voting is restricted to women. As per usual, the Liberals lead quite handily among university graduates and they enjoy a sizeable lead with new Canadians.

Figure 6: Vote intention by gender/age  informative, insightful, influential

Q. If a federal election were held tomorrow, which party would you vote for?

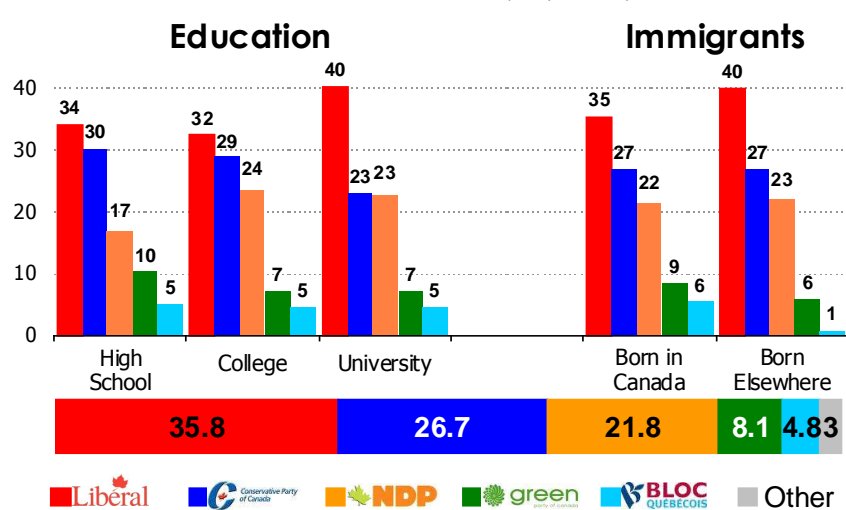


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Figure 7: Vote intention by other key demos  informative, insightful, influential

Q. If a federal election were held tomorrow, which party would you vote for?



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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

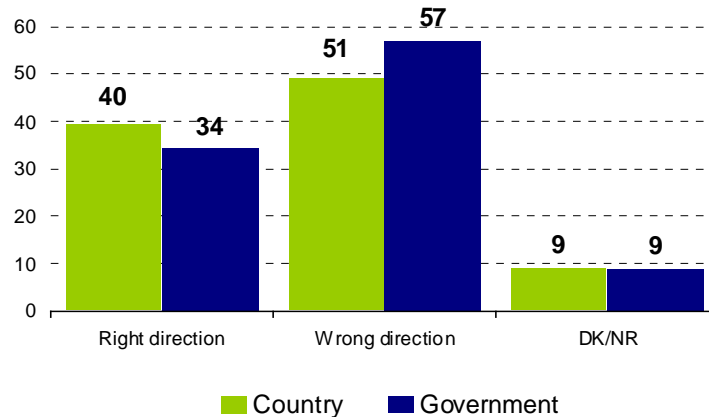
Other fundamentals

Throughout the nineties, it was rare to see confidence in national direction drop below 70 points. It now stands at 40 per cent and confidence in federal direction – which used to be twinned with national direction – is just over 34 per cent. These are very daunting numbers for any incumbent and they link to deep pessimism about the future and a growing consensus that stagnation has

replaced progress for most Canadians.¹ These very poor grades, coupled with even poorer marks for democratic trust², pose profound challenges for the unpopular Stephen Harper regime labouring under the eventual fatigue that tends to infect even the most popular governments. They still hold the hand of a unified right base but increasingly it appears this will not be enough to offset these other challenges.

Figure 8: Direction of country/government informative, insightful, influential

Q. All things considered, would you say the country/government is moving in the right direction or the wrong direction?

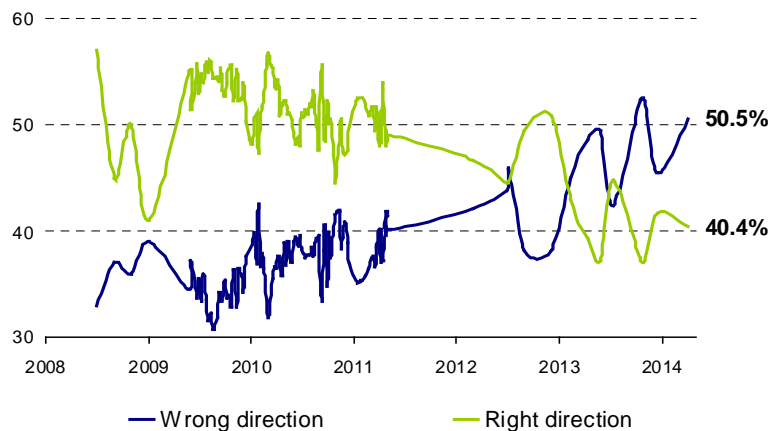


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BASE: Canadians (half-sample each); March 27-April 3, 2013 (n=1,966/2,168)

Figure 9: Direction of country informative, insightful, influential

Q. All things considered, would you say the country is moving in the right direction or the wrong direction?



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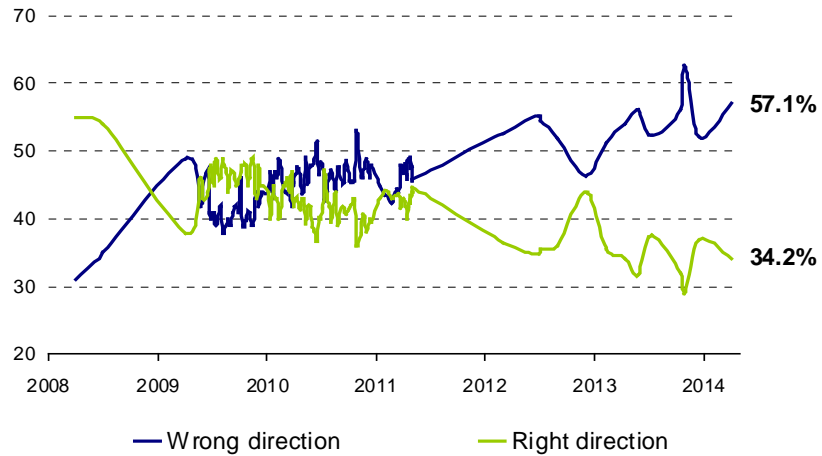
BASE: Canadians (half-sample); March 27-April 3, 2013 (n=1,966)

¹ EKOS Research Associates, "Looking Back and Looking Forward - Part 3: Progress' End?", January 3, 2014. Available online at: <http://goo.gl/gwnzmR>

² EKOS Research Associates, "Looking Back and Looking Forward - Part 2: Are We Approaching a Crisis in Democracy?", January 3, 2014. Available online at: <http://goo.gl/31oXAn>

Figure 10: Direction of government 

Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?



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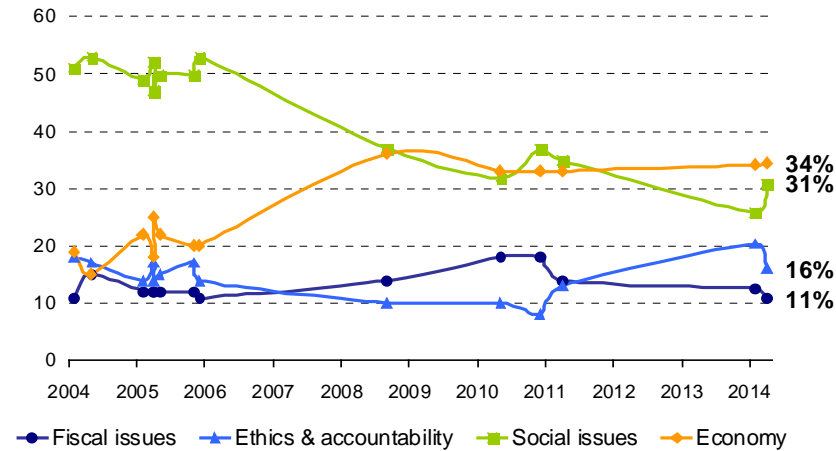
BASE: Canadians (half-sample); March 27-April 3, 2013 (n=2,168)

Salient Issue

Our rather basic issue tracking indicator shows that the economy continues to dominate public concerns in a way that is completely different than a decade ago when it was social issues like health care that dominated. This shift has favoured the Conservative Party, but it remains to be seen whether the growing dissatisfaction with halted progress can be played against the government by the Liberals and the NDP. The blip up in social issues now ties with the economy may also reflect growing concerns with the new form of income stagnation and highly stratified growth at the very top of the ladder. The decline in concern with fiscal issues (taxes and deficit) is linked to growing belief in the public that austerity and minimal government have not been the prosperity solution that was advertised. On the other hand, the fairly low position of ethics and accountability suggests that the concerted attacks on Senate spending and related matters have not gained much real traction and that the opposition contenders may want to focus elsewhere in the coming year.

Figure 11: Most important election issue informative, insightful, influential

Q. Which of the following do you think should be the most important issue for the next federal election?



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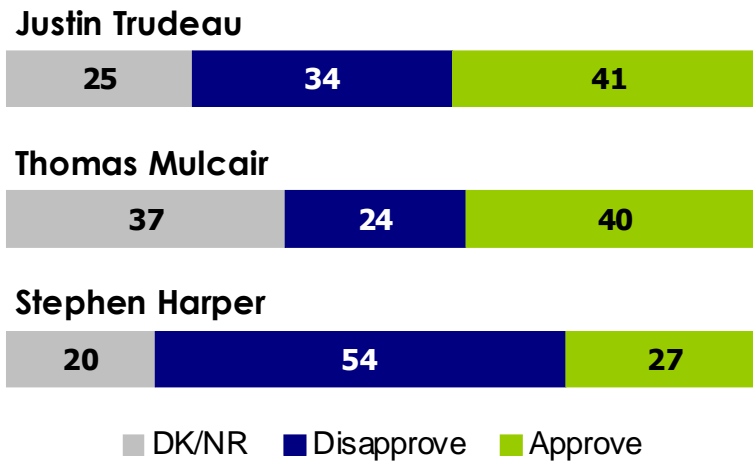
BASE: Canadians; most recent data point March 27-April 3, 2014 (n=4,134)

Who do we like?

In a world where trust in politicians is sliding into single digit territory, we don't seem to care much for any of our leaders. There is, however, a fairly clear lean to not approve of Stephen Harper with only 27 per cent of respondents voicing their approval (which ties his popular vote support). Justin Trudeau and Thomas Mulcair are basically tied in positive approval at 41 and 40 points, respectively, so the leaders of the opposition parties hold a clear advantage. Mr. Mulcair has higher "unknowns", but less negatives, whereas it is the reverse for Mr. Trudeau. One area of concern for the Liberals, however, is that despite the party's recent fortunes, Mr. Trudeau's disapproval rating has risen at a somewhat alarming pace. As more Canadians become familiar with him, the lean is becoming increasingly towards disapproval.

Figure 12: Job approval ratings

Q. Do you approve or disapprove of the way ... is handling his job?

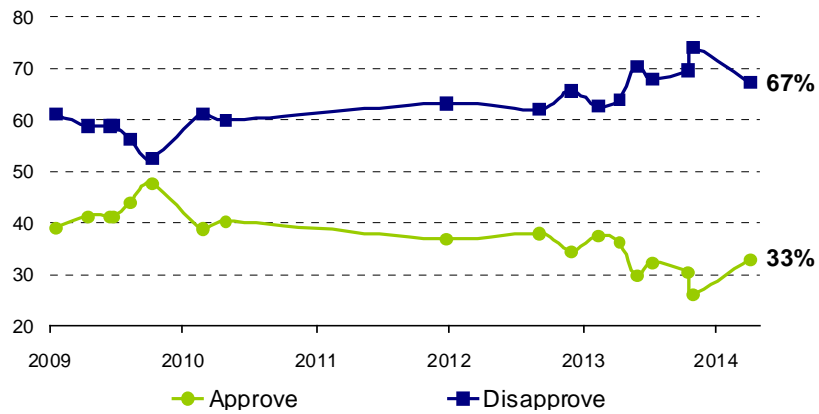


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Figure 13: Approval – Stephen Harper informative, insightful, influential

Q. Do you approve or disapprove of the way Stephen Harper, Prime Minister of Canada and leader of the Conservative Party of Canada, is handling his job?



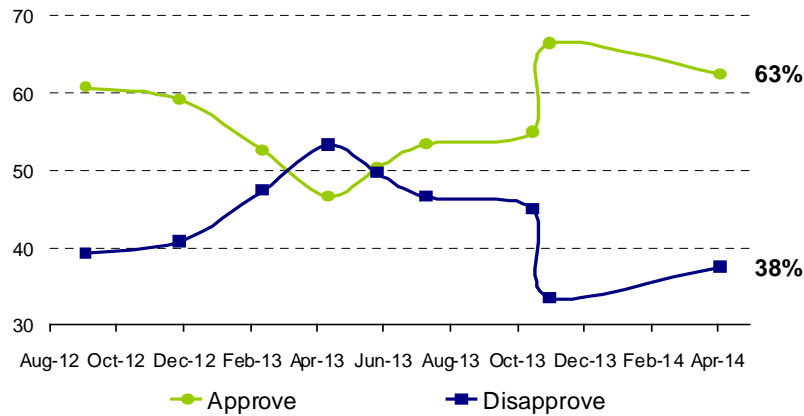
Note: Figures adjusted to exclude those who did not provide valid responses

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Figure 14: Approval – Thomas Mulcair informative, insightful, influential

Q. Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?



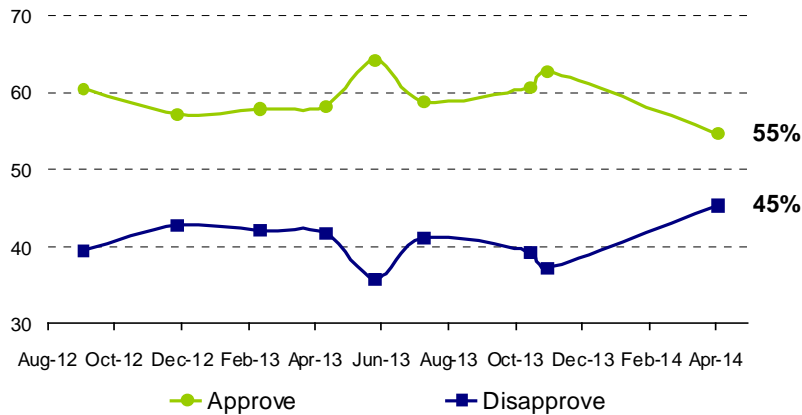
Note: Figures adjusted to exclude those who did not provide valid responses

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Figure 15: Approval – Justin Trudeau 

Q. Do you approve or disapprove of the way Justin Trudeau, Member of Parliament and leader of the Liberal Party of Canada, is handling his job?



Note: Figures adjusted to exclude those who did not provide valid responses

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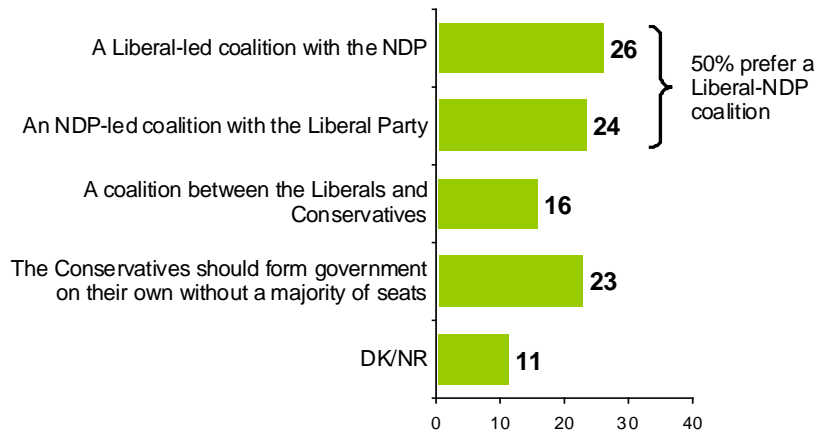
BASE: Canadians; most recent data point March 27-April 3, 2014 (n=4,134)

A final note on the C-word

As none of the parties are clearly in majority territory (although the Liberals are knocking on the door, particularly with their lead in Ontario and Quebec), we decided to have a look at the coalition issue. Without over-reading the chart below, two things are clear.

Figure 16: Attitudes towards coalitions 

Q. If the Conservative Party wins the next federal election but captures significantly less than half the seats, which of the following options for creating a majority government would you prefer?



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BASE: Canadians; March 27-April 3, 2014 (n=4,134)

First, a large majority would prefer a coalition of some form rather than a return to the polls if the Conservatives were to win a minority in the next election. Less than one in four would want to see Conservatives go it alone, which suggests the bar has to be set pretty high (around 14 points above where the Conservatives are stuck right now). Second, the preferred option is some form of Liberal–NDP coalition with an overall point of indifference as to who should lead. This suggests that even though Justin Trudeau has the clear higher ground at this time, if he should stumble and a large portion of the politically promiscuous progressive vote switches to Thomas Mulcair, about half of all voters feel that a progressive coalition of any flavour is better than a continued Conservative government.

Top-Line Results:

Figure 17: Second choice



Q. What party would be your second choice?

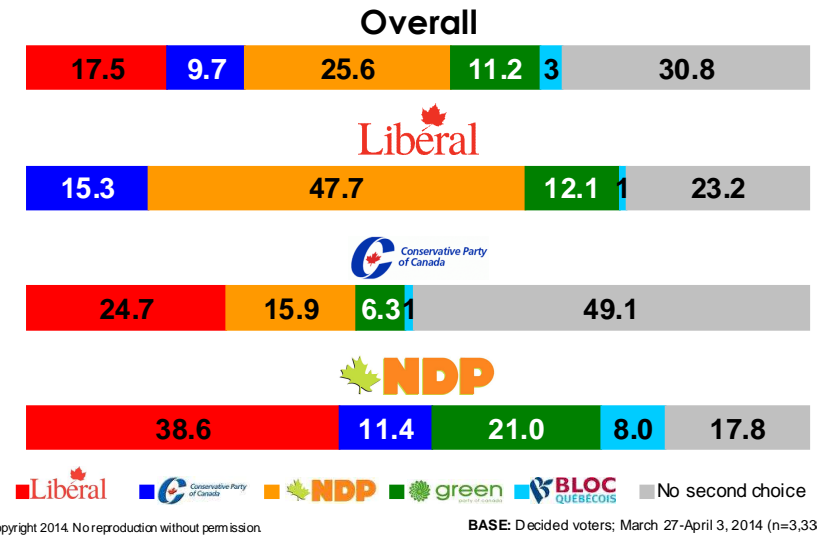
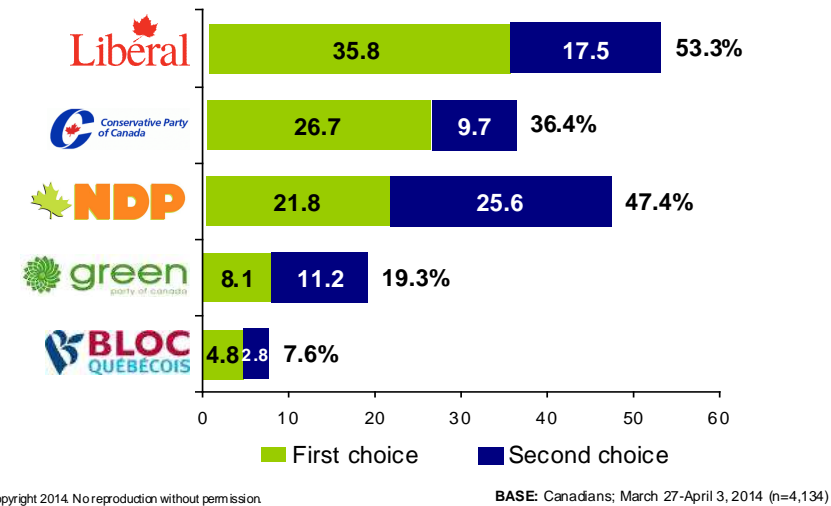


Figure 18: Theoretical party ceilings








Q. If a federal election were held tomorrow, which party would you vote for?

[IF DECIDED] What party would be your second choice?




Detailed Tables:

National Federal Vote Intention (decided and leaning voters only)								
<i>Q. If a federal election were held tomorrow, which party would you vote for? [If undecided] Even if you do not have a firm idea, are you leaning towards a party? [If yes] As it stands, towards which party are you leaning?</i>								
	 Liberal	 Conservative Party of Canada	 NDP	 green	 BLOC QUEBÉCOIS	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	35.8%	26.7%	21.8%	8.1%	4.8%	2.7%	3504	1.7
REGION								
British Columbia	32.2%	25.8%	25.7%	13.8%	--	2.5%	373	5.1
Alberta	25.9%	53.7%	9.6%	6.7%	--	4.0%	292	5.7
Saskatchewan	22.9%	46.3%	22.0%	7.2%	--	1.6%	115	9.1
Manitoba	28.1%	40.9%	20.1%	5.7%	--	5.2%	104	9.6
Ontario	40.4%	26.0%	21.1%	9.6%	--	2.9%	1035	3.1
Quebec	33.8%	15.4%	25.2%	4.8%	18.6%	2.3%	1333	2.7
Atlantic Canada	48.8%	21.4%	23.5%	4.6%	--	1.8%	241	6.3
GENDER								
Male	34.7%	31.4%	19.1%	7.2%	4.8%	2.8%	1889	2.3
Female	36.8%	22.2%	24.8%	8.9%	4.8%	2.5%	1579	2.5
AGE								
<25	32.7%	25.0%	12.3%	22.2%	3.2%	4.6%	131	8.6
25-44	33.9%	21.8%	27.7%	8.8%	5.3%	2.7%	824	3.4
45-64	37.6%	27.4%	21.5%	5.5%	5.7%	2.3%	1444	2.6
65+	36.9%	35.3%	18.2%	4.5%	2.9%	2.2%	1072	3.0
EDUCATION								
High school or less	33.9%	30.2%	17.3%	10.3%	5.2%	3.2%	713	3.7
College or CEGEP	32.3%	28.7%	24.1%	7.2%	4.6%	3.1%	1127	2.9
University or higher	40.1%	22.9%	23.4%	7.2%	4.6%	1.8%	1626	2.4
COUNTRY OF BIRTH								
Canada	35.1%	26.8%	21.8%	8.5%	5.5%	2.3%	2967	1.8
Other	39.8%	26.9%	22.6%	5.7%	0.7%	4.2%	515	4.3


Direction of Country

Q. All things considered, would you say the country is moving in the right direction or the wrong direction?

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	40.4%	50.5%	9.1%	1966	2.2
REGION					
British Columbia	38.5%	49.3%	12.2%	222	6.6
Alberta	56.7%	30.7%	12.7%	183	7.2
Saskatchewan	43.0%	45.2%	11.8%	67	12.0
Manitoba	33.8%	48.6%	17.6%	75	11.3
Ontario	39.9%	51.6%	8.5%	581	4.1
Quebec	35.5%	60.1%	4.4%	680	3.8
Atlantic Canada	39.9%	49.6%	10.5%	151	8.0
GENDER					
Male	44.4%	52.9%	2.8%	1000	3.1
Female	40.9%	53.2%	5.9%	846	3.4
AGE					
<25	48.0%	44.6%	7.5%	85	10.6
25-44	38.6%	57.6%	3.8%	429	4.7
45-64	40.7%	55.4%	3.9%	760	3.6
65+	49.2%	46.0%	4.8%	573	4.1
EDUCATION					
High school or less	42.7%	51.0%	6.2%	395	4.9
College or CEGEP	42.9%	53.1%	4.0%	603	4.0
University or higher	42.5%	54.1%	3.5%	846	3.4
COUNTRY OF BIRTH					
Canada	41.5%	53.9%	4.6%	1573	2.5
Other	47.3%	47.7%	5.0%	289	5.8
CURRENT VOTE INTENTION					
Liberal Party	34.7%	62.1%	3.3%	617	4.0
Conservative Party	74.0%	22.1%	3.9%	437	4.7
NDP	26.0%	73.4%	0.7%	349	5.3
Green Party	32.0%	65.5%	2.5%	100	9.8
Bloc Quebecois	28.3%	66.8%	4.9%	119	9.0



Direction of Government






Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	34.2%	57.1%	8.8%	2168	2.1
REGION					
British Columbia	30.4%	56.5%	13.1%	250	6.2
Alberta	44.3%	44.1%	11.6%	209	6.8
Saskatchewan	39.2%	46.0%	14.8%	77	11.2
Manitoba	47.0%	44.0%	9.0%	64	12.3
Ontario	32.8%	57.5%	9.7%	653	3.8
Quebec	33.8%	64.0%	2.3%	742	3.6
Atlantic Canada	26.0%	67.0%	7.0%	164	7.7
GENDER					
Male	37.0%	58.9%	4.1%	1077	3.0
Female	34.9%	60.8%	4.3%	970	3.2
AGE					
<25	34.4%	60.4%	5.2%	84	10.7
25-44	34.3%	61.8%	3.9%	507	4.4
45-64	35.5%	59.9%	4.5%	832	3.4
65+	40.1%	55.6%	4.3%	625	3.9
EDUCATION					
High school or less	43.0%	51.5%	5.5%	461	4.6
College or CEGEP	35.4%	60.1%	4.5%	652	3.8
University or higher	30.5%	66.2%	3.3%	932	3.2
COUNTRY OF BIRTH					
Canada	34.5%	61.2%	4.2%	1743	2.4
Other	42.1%	51.7%	6.2%	317	5.5
CURRENT VOTE INTENTION					
Liberal Party	23.8%	72.8%	3.4%	662	3.8
Conservative Party	82.4%	13.9%	3.7%	485	4.5
NDP	15.5%	81.3%	3.2%	418	4.8
Green Party	19.3%	74.9%	5.8%	113	9.2
Bloc Quebecois	13.6%	82.7%	3.8%	123	8.8



Second Choice

Q. Talking again in terms of a federal election, which party would be your second choice?

	 Liberal	 Conservative Party of Canada	 NDP	 Green Party	 BLOQ QUEBECOIS	Other	No 2 nd choice	Sample Size	Margin of Error (+/-)
NATIONALLY	17.5%	9.7%	25.6%	11.2%	2.8%	2.5%	30.8%	3338	1.7
REGION									
British Columbia	21.7%	7.3%	23.1%	17.7%	--	1.1%	29.2%	379	5.0
Alberta	15.0%	6.7%	20.2%	9.0%	--	3.2%	45.9%	295	5.7
Saskatchewan	24.9%	5.8%	17.9%	11.5%	--	2.4%	37.6%	117	9.1
Manitoba	23.7%	6.5%	15.2%	10.9%	--	1.6%	42.2%	106	9.5
Ontario	16.2%	11.7%	28.6%	12.3%	--	2.6%	28.5%	1042	3.0
Quebec	15.7%	9.9%	23.7%	7.3%	12.3%	2.7%	28.5%	1145	2.9
Atlantic Canada	18.3%	10.5%	35.2%	8.1%	--	3.2%	24.5%	243	6.3
GENDER									
Male	18.1%	9.0%	25.5%	11.4%	2.8%	2.6%	30.5%	1796	2.3
Female	17.1%	10.5%	25.9%	11.2%	2.9%	2.1%	30.2%	1500	2.5
AGE									
<25	13.2%	9.9%	24.7%	10.9%	1.6%	2.5%	37.4%	129	8.6
25-44	18.6%	11.5%	24.8%	11.8%	4.2%	2.9%	26.1%	780	3.5
45-64	18.6%	8.9%	26.7%	11.9%	2.5%	2.3%	29.1%	1363	2.7
65+	16.2%	8.3%	25.3%	9.5%	1.8%	1.7%	37.2%	1026	3.1
EDUCATION									
High school or less	15.7%	10.1%	22.7%	9.1%	2.0%	2.7%	37.7%	690	3.7
College or CEGEP	17.5%	9.1%	25.4%	11.6%	3.5%	2.7%	30.4%	1078	3.0
University or higher	19.2%	10.0%	28.0%	12.5%	2.9%	1.9%	25.5%	1524	2.5
COUNTRY OF BIRTH									
Canada	17.4%	9.2%	26.6%	11.0%	3.2%	2.5%	30.1%	2813	1.9
Other	18.4%	12.5%	20.6%	12.8%	0.9%	2.1%	32.6%	497	4.4
VOTE INTENTION									
Liberal Party	--	15.3%	47.7%	12.1%	0.8%	1.0%	23.2%	1197	2.8
Conservative Party	24.7%	--	15.9%	6.3%	0.8%	3.2%	49.1%	883	3.3
NDP	38.6%	11.4%	--	21.0%	8.0%	3.1%	17.8%	697	3.7
Green Party	25.1%	13.5%	29.3%	--	3.2%	4.0%	24.9%	200	6.9
Bloc Quebecois	6.7%	6.8%	41.4%	9.3%	--	4.4%	31.3%	190	7.1



Most Important Election Issue

Q. Which of the following do you think should be the most important issue for the next federal election?

- 1.) Issues like ethics and accountability*
- 2.) The economy, jobs, and growth*
- 3.) Fiscal issues like taxes and debt*
- 4.) Social issues like health and education*

	Ethics and accountability	Economic issues	Fiscal issues	Social issues	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	16.1%	34.4%	11.0%	30.8%	0.8%	7.0%	4134
REGION							
British Columbia	22.2%	27.4%	8.3%	30.9%	1.0%	10.1%	472
Alberta	16.3%	32.3%	14.1%	26.8%	0.0%	10.5%	392
Saskatchewan	22.9%	28.5%	9.8%	29.4%	0.0%	9.4%	144
Manitoba	21.8%	24.8%	16.1%	21.1%	0.7%	15.4%	139
Ontario	18.7%	34.2%	11.2%	28.1%	1.2%	6.6%	1234
Quebec	6.6%	41.1%	11.7%	37.9%	0.5%	2.2%	1422
Atlantic Canada	14.4%	38.3%	6.5%	32.5%	0.7%	7.5%	315
GENDER							
Male	17.7%	39.6%	14.8%	25.0%	0.8%	2.1%	2077
Female	15.8%	33.0%	8.4%	39.5%	0.6%	2.6%	1816
AGE							
<25	21.1%	30.2%	10.7%	32.2%	1.9%	3.8%	169
25-44	14.6%	33.1%	12.5%	36.7%	0.7%	2.5%	936
45-64	16.7%	39.8%	11.9%	29.3%	0.4%	1.9%	1592
65+	18.1%	38.2%	9.8%	30.9%	0.8%	2.1%	1198
EDUCATION							
High school or less	17.7%	40.1%	11.2%	28.9%	0.7%	1.4%	856
College or CEGEP	15.1%	38.5%	12.3%	30.8%	0.5%	2.8%	1255
University or higher	17.5%	31.1%	11.1%	36.4%	1.0%	2.9%	1778
COUNTRY OF BIRTH							
Canada	17.1%	35.6%	11.2%	32.9%	0.7%	2.6%	3316
Other	15.3%	39.2%	13.2%	28.8%	1.1%	2.4%	606
CURRENT VOTE INTENTION							
Liberal Party	21.8%	35.0%	8.0%	32.7%	0.5%	2.1%	1279
Conservative Party	9.6%	52.5%	18.7%	17.5%	0.8%	0.9%	922
NDP	17.1%	28.4%	8.6%	44.3%	0.4%	1.3%	767
Green Party	27.9%	20.1%	9.5%	35.9%	2.6%	4.0%	213
Bloc Quebecois	6.3%	25.8%	11.9%	53.0%	0.3%	2.7%	242

Approval Rating – Stephen Harper

Q. Do you approve or disapprove of the way Stephen Harper, Prime Minister and leader of Conservative Party of Canada is handling his job?

	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	26.5%	54.0%	13.2%	6.3%	4134	1.5
REGION						
British Columbia	22.1%	55.5%	13.9%	8.5%	472	4.5
Alberta	40.6%	34.2%	15.5%	9.8%	392	5.0
Saskatchewan	31.1%	43.4%	15.6%	9.8%	144	8.2
Manitoba	23.2%	48.5%	14.2%	14.1%	139	8.3
Ontario	27.1%	55.0%	11.9%	6.1%	1234	2.8
Quebec	24.2%	61.8%	12.5%	1.5%	1422	2.6
Atlantic Canada	16.9%	59.3%	16.2%	7.6%	315	5.5
GENDER						
Male	32.6%	55.9%	10.0%	1.5%	2077	2.2
Female	23.4%	57.4%	17.6%	1.6%	1816	2.3
AGE						
<25	24.3%	52.0%	20.7%	2.9%	169	7.5
25-44	27.2%	56.7%	14.0%	2.1%	936	3.2
45-64	27.2%	59.9%	12.0%	0.9%	1592	2.5
65+	32.4%	53.2%	13.0%	1.3%	1198	2.8
EDUCATION						
High school or less	29.3%	49.2%	19.2%	2.3%	856	3.4
College or CEGEP	29.5%	54.7%	14.0%	1.8%	1255	2.8
University or higher	25.3%	64.1%	9.3%	1.2%	1778	2.3
COUNTRY OF BIRTH						
Canada	27.1%	58.5%	12.8%	1.6%	3316	1.7
Other	31.2%	46.7%	19.0%	3.1%	606	4.0
CURRENT VOTE INTENTION						
Liberal Party	12.4%	74.1%	11.9%	1.6%	1279	2.7
Conservative Party	77.5%	11.8%	10.4%	0.3%	922	3.2
NDP	11.9%	78.8%	8.8%	0.5%	767	3.5
Green Party	12.1%	74.5%	11.9%	1.5%	213	6.7
Bloc Quebecois	10.1%	77.4%	11.9%	0.6%	242	6.3


Approval Rating – Thomas Mulcair

Q. Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?

	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	39.5%	23.7%	29.2%	7.5%	4134	1.5
REGION						
British Columbia	37.3%	22.9%	30.0%	9.8%	472	4.5
Alberta	26.3%	33.1%	29.5%	11.2%	392	5.0
Saskatchewan	28.1%	40.6%	22.1%	9.2%	144	8.2
Manitoba	27.6%	32.7%	26.9%	12.8%	139	8.3
Ontario	38.1%	24.0%	30.1%	7.7%	1234	2.8
Quebec	53.4%	17.7%	26.4%	2.5%	1422	2.6
Atlantic Canada	37.6%	17.6%	35.7%	9.1%	315	5.5
GENDER						
Male	45.2%	30.0%	22.4%	2.4%	2077	2.2
Female	38.2%	19.6%	39.0%	3.1%	1816	2.3
AGE						
<25	27.5%	29.3%	37.5%	5.8%	169	7.5
25-44	42.3%	21.9%	32.7%	3.0%	936	3.2
45-64	44.8%	25.2%	28.2%	1.8%	1592	2.5
65+	43.2%	26.2%	28.3%	2.4%	1198	2.8
EDUCATION						
High school or less	31.4%	27.2%	37.3%	4.1%	856	3.4
College or CEGEP	39.7%	26.0%	31.9%	2.4%	1255	2.8
University or higher	51.2%	22.0%	24.5%	2.3%	1778	2.3
COUNTRY OF BIRTH						
Canada	42.1%	25.2%	29.7%	3.0%	3316	1.7
Other	38.3%	22.8%	35.6%	3.3%	606	4.0
CURRENT VOTE INTENTION						
Liberal Party	50.0%	20.2%	26.9%	2.9%	1279	2.7
Conservative Party	25.8%	42.9%	29.8%	1.4%	922	3.2
NDP	67.6%	9.6%	22.0%	0.8%	767	3.5
Green Party	32.1%	30.6%	35.1%	2.2%	213	6.7
Bloc Quebecois	49.8%	21.0%	27.9%	1.3%	242	6.3

Approval Rating – Justin Trudeau

Q. Do you approve or disapprove of the way Justin Trudeau, leader of the Liberal Party of Canada, is handling his job?

	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	41.3%	34.2%	17.8%	6.7%	4134	1.5
REGION						
British Columbia	44.7%	29.4%	17.2%	8.7%	472	4.5
Alberta	30.6%	42.7%	15.6%	11.1%	392	5.0
Saskatchewan	30.2%	40.8%	19.4%	9.5%	144	8.2
Manitoba	32.4%	37.5%	15.6%	14.6%	139	8.3
Ontario	44.2%	32.7%	16.6%	6.6%	1234	2.8
Quebec	40.5%	37.3%	20.9%	1.3%	1422	2.6
Atlantic Canada	48.3%	24.4%	18.6%	8.7%	315	5.5
GENDER						
Male	44.1%	40.3%	13.9%	1.6%	2077	2.2
Female	42.9%	31.7%	23.2%	2.2%	1816	2.3
AGE						
<25	40.6%	37.6%	17.8%	4.0%	169	7.5
25-44	45.1%	31.9%	20.5%	2.6%	936	3.2
45-64	45.5%	37.7%	15.8%	1.0%	1592	2.5
65+	38.4%	38.5%	21.6%	1.5%	1198	2.8
EDUCATION						
High school or less	39.4%	38.2%	20.3%	2.1%	856	3.4
College or CEGEP	41.6%	36.5%	19.7%	2.2%	1255	2.8
University or higher	48.4%	33.3%	16.3%	2.0%	1778	2.3
COUNTRY OF BIRTH						
Canada	43.8%	37.0%	17.2%	2.0%	3316	1.7
Other	41.3%	29.8%	25.8%	3.1%	606	4.0
CURRENT VOTE INTENTION						
Liberal Party	77.1%	10.2%	11.3%	1.4%	1279	2.7
Conservative Party	18.4%	65.4%	15.2%	0.9%	922	3.2
NDP	39.3%	36.8%	23.3%	0.6%	767	3.5
Green Party	42.7%	33.6%	22.6%	1.0%	213	6.7
Bloc Quebecois	17.6%	63.1%	18.3%	1.0%	242	6.3



Views on Coalitions

Q. If the Conservative Party wins the next federal election but captures significantly less than half the seats, which of the following options for creating a majority government would you prefer?

- 1.) A coalition between the Liberals and Conservatives*
- 2.) A Liberal-led coalition with the NDP*
- 3.) An NDP-led coalition with the Liberal Party*
- 4.) The Conservatives should form government on their own without a majority of seats*

	Liberal-Conservative Coalition	Liberal-led coalition with the NDP	NDP-led coalition with the Liberals	Conservatives should form government alone	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	15.9%	26.2%	23.5%	23.0%	11.4%	4134	1.5
REGION							
British Columbia	15.5%	21.5%	28.7%	19.0%	15.3%	472	4.5
Alberta	19.9%	14.7%	15.3%	33.1%	16.9%	392	5.0
Saskatchewan	13.5%	21.6%	17.2%	34.5%	13.1%	144	8.2
Manitoba	17.8%	21.5%	15.9%	30.6%	14.3%	139	8.3
Ontario	16.7%	29.0%	22.7%	21.7%	9.9%	1234	2.8
Quebec	14.1%	30.0%	28.7%	19.3%	7.9%	1422	2.6
Atlantic Canada	13.1%	30.3%	20.0%	24.3%	12.3%	315	5.5
GENDER							
Male	16.5%	27.1%	23.6%	28.5%	4.3%	2077	2.2
Female	17.0%	28.2%	25.7%	20.1%	8.9%	1816	2.3
AGE							
<25	18.9%	22.4%	25.5%	23.8%	9.5%	169	7.5
25-44	16.4%	25.8%	29.4%	20.9%	7.4%	936	3.2
45-64	16.0%	30.9%	22.0%	25.5%	5.6%	1592	2.5
65+	17.6%	27.3%	21.3%	28.0%	5.8%	1198	2.8
EDUCATION							
High school or less	19.4%	26.6%	21.0%	24.5%	8.5%	856	3.4
College or CEGEP	16.3%	24.5%	25.3%	26.5%	7.4%	1255	2.8
University or higher	15.2%	31.2%	26.9%	21.9%	4.9%	1778	2.3
COUNTRY OF BIRTH							
Canada	15.9%	27.7%	24.3%	24.6%	7.4%	3316	1.7
Other	21.0%	26.6%	26.1%	21.3%	5.0%	606	4.0
CURRENT VOTE INTENTION							
Liberal Party	15.0%	55.1%	16.5%	8.6%	4.8%	1279	2.7
Conservative Party	27.4%	6.9%	4.8%	58.0%	2.9%	922	3.2
NDP	6.4%	19.4%	63.3%	7.9%	3.0%	767	3.5
Green Party	16.3%	29.8%	31.9%	14.3%	7.7%	213	6.7
Bloc Quebecois	10.4%	16.4%	36.0%	23.4%	13.7%	242	6.3



Methodology:

This study was conducted using Interactive Voice Response (IVR) technology, which allows respondents to enter their preferences by punching the keypad on their phone, rather than telling them to an operator.

In an effort to reduce the coverage bias of landline only RDD, we created a dual landline/cell phone RDD sampling frame for this research. As a result, we are able to reach those with a landline and cell phone, as well as cell phone only households and landline only households. This methodology is not to be confused with the increasing proliferation of non-probability opt-in online panels which have recently been incorrectly reported in major national media with inappropriate margin of error estimates.

The field dates for this survey are March 27-April 3, 2014. In total, a random sample of 4,134 Canadian adults aged 18 and over responded to the survey (including a sub-sample of 3,504 decided voters). The margin of error associated with the total sample is +/-1.5 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as region, sex, age, education). All the data have been statistically weighted by **age, gender, region, and educational attainment** to ensure the sample's composition reflects that of the actual population of Canada according to Census data.