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QUEBEC LIBERALS HEADED TO A WIN

QUEBECKERS REJECT REFERENDUM ADVENTURE AS IT APPEARS THEY HAVE ALREADY EMOTIONALLY SEPARATED FROM CANADA

[Ottawa – April 4, 2014] As a rather unusual campaign nears completion, it appears that Pauline Marois’ gambit to secure a majority mandate and a path to a new referendum, has gone horribly wrong for her and the Parti Québécois (PQ). Barring some frankly unforeseeable collapse Philippe Couillard’s Liberal party is going to emerge with a victory on Monday. It is unclear whether it will be a majority or not, but the high hopes of a PQ win, let alone a majority, lie in ruins. The wild card in all of this will be turnout and seat efficiencies but it is almost inconceivable that the PQ can eke out any form of victory.

We applied a new “likely voter” model where we drop “serial” non-voters (i.e., those voters who did not vote in either the last provincial election or the last federal election) and we weight the remaining results to the demographic composition of those who actually voted in the 2012 Quebec general election (we normally weight the result to match the demographic composition of the population as a whole). This new model had only a trivial impact on the results.

If this turns out to be true, the relatively high turnout in Quebec, along with the relatively even representation of all eligible voters in the population of actual voters, are democratic achievements to be envied by the rest of Canada which features lower turnout and very large gaps between voters and non-voters.

We think that our projections of popular vote are solid but we don’t pretend to have the same fluency on the peculiarities and nuances of Quebec politics as some of our colleagues in Quebec. We do have a serious interest and experience in how this connects to the federal political scene. This campaign appeared to be ushering in a new

HIGHLIGHTS

- **Quebec vote intention:**
 - ▣ **40.0% Quebec Liberal Party**
 - ▣ **26.3% Parti Québécois**
 - ▣ **21.0% Coalition Avenir Québec**
 - ▣ **9.6% Québec Solidaire**
 - ▣ **3.1% Other**
- **“Likely voter” model*:**
 - ▣ **39.8% Quebec Liberal Party**
 - ▣ **27.0% Parti Québécois**
 - ▣ **21.1% Coalition Avenir Québec**
 - ▣ **9.4% Québec Solidaire**
 - ▣ **2.8% Other**
- **Support for Quebec sovereignty:**
 - ▣ **24% Status quo**
 - ▣ **22% Decentralized federalism**
 - ▣ **17% Complete independence**
 - ▣ **16% Sovereignty-association**
 - ▣ **20% None of the above**
 - ▣ **1% Don’t know/No response**
- **Support for Quebec sovereignty (forced choice):**
 - ▣ **65% Status quo**
 - ▣ **32% Complete independence**
 - ▣ **2% Don’t know/No response**

** Our “likely voters” model involves dropping “serial” non-voters (i.e., those who did not vote in either the 2011 federal election or the 2012 provincial election) and weighting the remaining data to match the demographic composition of those who voted in the 2012 Quebec election.*

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

referendum at the outset of the campaign and we are very interested in this now fairly obscure prospect. We will show that our tracking shows that the Quebec citizenry have decisively turned away from the adventure of another referendum and the Liberal's imminent victory is a vivid indicator of that decision, as is our tracking of attitudes to various sovereigntist and federalist scenarios. We will also show that Quebecers are turning their backs on this prospect not over any new affection for federalism. In fact, the latest attachment numbers suggest that another referendum may well be moot as Quebecers have already left confederation in any emotional or symbolic sense.¹

Quebec vote intention

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

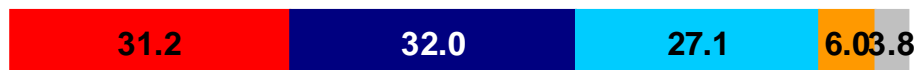
Provincial Results



Provincial Results – “Likely voter” model*



2012 Election Results



Note: The data on provincial vote intention are based on decided and leaning voters only. Our survey also finds that 6.0% of respondents are undecided.

*Our “likely voters” model involves dropping “serial” non-voters (i.e., those who did not vote in either the 2011 federal election or the 2012 provincial election) and weighting the remaining data to match the demographic composition of those who voted in the 2012 Quebec election.

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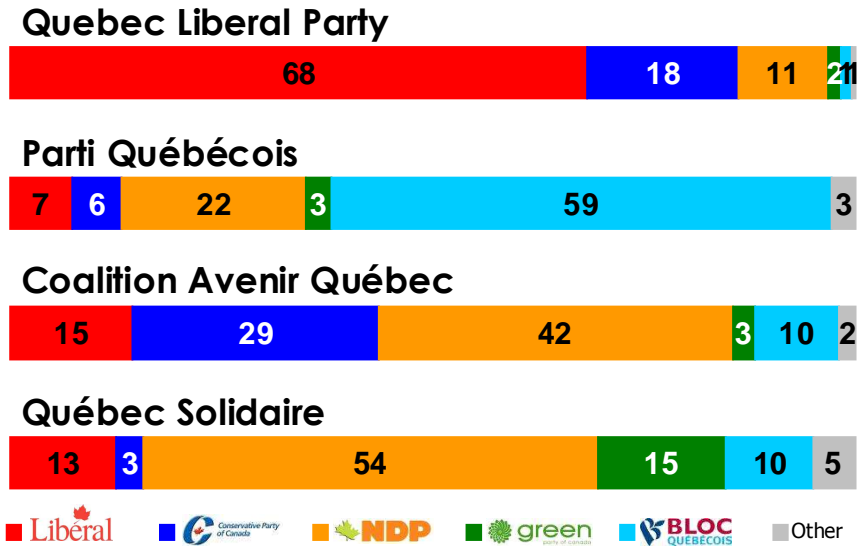
BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)

¹ Frank Graves, “The Cultural Faultlines in Quebec are Getting Wider”, iPolitics, April 3, 2014. Available online at: <http://goo.gl/zHSf4P>

Consider the connections across federal and provincial support:

Composition of Quebec party support

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



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BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)

Two-thirds of Quebec Liberal support comes from federal Liberal supporters. The Parti Québécois seems to complement its federal Bloc Québécois counterpart, with both parties relying largely on each other's bases. The Coalition Avenir Québec (CAQ), meanwhile, is something of a puzzle, as they enjoy strong representation from all sides of the political spectrum – NDP, Conservatives, and Liberals. In contrast, Québec Solidaire is overwhelmingly NDP.

Half of lapsed and new voters going to Liberals

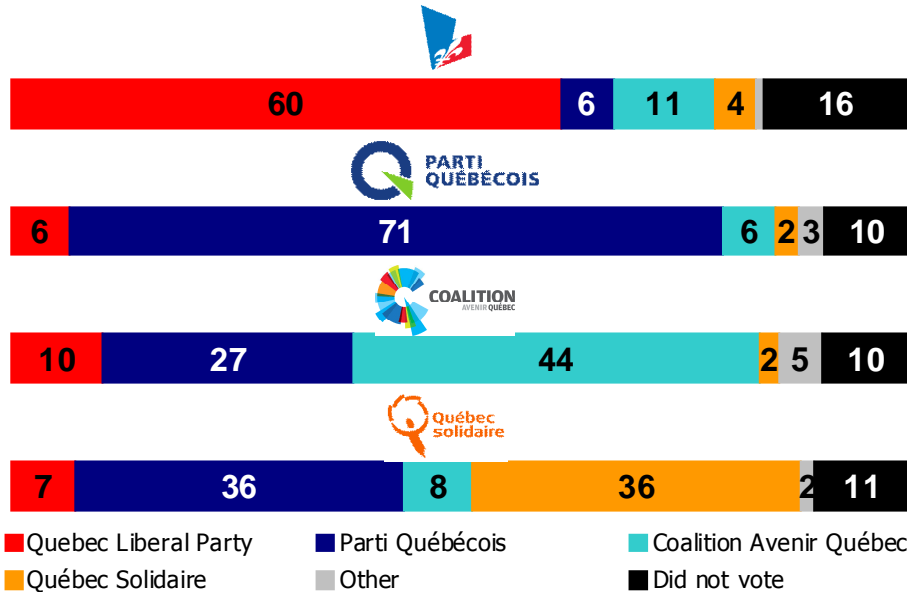
One of the key issues to watch will be whether the Liberal strength with new and lapsed voters carries over to the ballot booth. Roughly half of those who did not cast a ballot in the 2012 Quebec election intend to vote Liberal and 16 per cent of the party's current support comes from new voters. This is a potential frailty in Liberal support.

The party has also been successful in drawing in former CAQ and Québec Solidaire supporters, with both parties having lost roughly one-quarter of the 2012 supporters to the Liberals. Coalition Avenir Québec and Québec Solidaire, meanwhile, have counterbalanced these losses by siphoning votes off of the Parti Québécois. Indeed, one-quarter of current CAQ supporters and one-third of Québec Solidaire voters are former PQ supporters.



Where are party supporters coming from?

Patterns/Flow of 2012 voters to current vote intention



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BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)

Where are party supporters going?

2012 vote broken down by current vote intention

Voted Liberal in 2012



Voted Parti Québécois in 2012



Voted Coalition Avenir Québec in 2012



Voted Québec Solidaire in 2012



Did not vote in 2012



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BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)



Economy ranks as leading election issue (but intertwined with sovereignty)

We also asked Quebeckers what they consider to be the single most important federal election issue and this provides a useful proxy for their issues for their issues for the provincial election. Compared to the rest of the country, Quebec residents are more concerned about economic and social issues. Furthermore, in a recent EKOS poll commissioned by the CBC, Quebeckers were asked, unprompted, to identify what they consider to be the most important election issue. Respondents overwhelmingly pointed to jobs and the economy, with issues such as language, sovereignty, and the Charter – all key elements of the PQ platform – receiving little attention by comparison.²

Our analysis suggests that sovereignty and a referendum were a critical factors in explaining the outcome of this campaign but that the underlying dynamic was a rejection of sovereignty and a referendum on two grounds. First the economic risks of this adventure did not seem prudent to Quebeckers at this time given economic anxieties. Second, and less obviously, it appears that emotional engagement to Canada has unravelled to such an extent that emotional separation has already occurred hence diminishing the need for legal separation.

Most important election issue

Q. Which of the following do you think should be the most important issue for the next federal election? Fiscal issues like taxes and debt; issues like ethics and accountability; social issues like health and education; or the economy, jobs, and growth?

Canada



Quebec



■ Fiscal issues
■ Social issues

■ Ethics & accountability
■ Economic issues

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

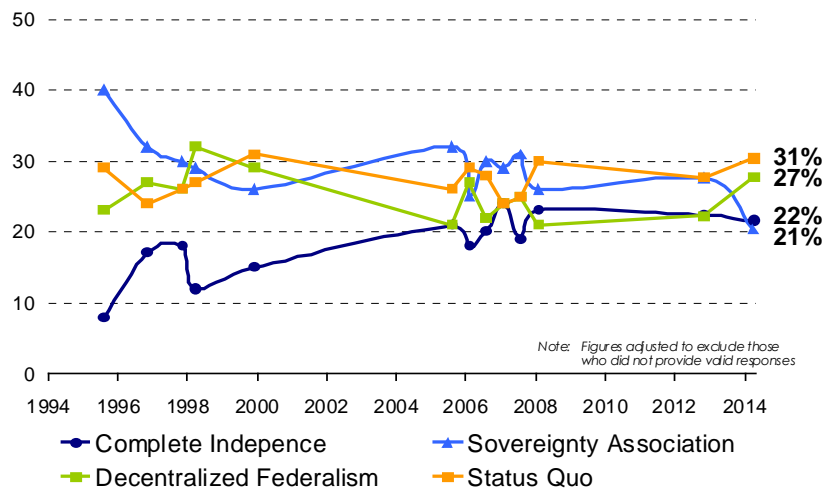
² CBC News, "The economy and jobs are most important election issues, CBC-EKOS poll shows", March 5, 2014. Available online at: <http://goo.gl/zXVY4G>

Support for sovereignty eases up as economy takes priority

Finally, we asked respondents about their views on Quebec sovereignty. Support for sovereignty has softened recently, with 58 per cent of Quebecers opting for a federalist option. What is more interesting, however, is the triumph of simply maintaining the status quo. In a forced choice exercise, respondents were asked whether they would prefer complete independence or the leaving things the way they are now. By a two-to-one margin, Quebec residents say they prefer the status quo. Indeed, as we have argued in a recent article³, the province has already achieved autonomy in an emotional and symbolic sense. Quebecers seem content with this achievement and there is little appetite for taking on the risks associated with complete independence.

Quebec sovereignty (Quebec only)

Q. [QUEBEC ONLY] Ideally, which of the following four options would you prefer for Québec?



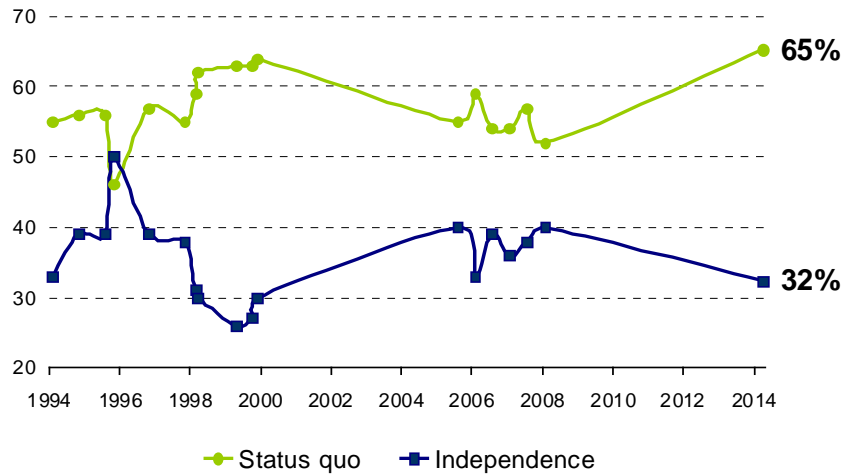
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BASE: Quebec residents; most recent data point March 27-April 3, 2014 (n=1,422)

³ Frank Graves, "The Cultural Faultlines in Quebec are Getting Wider", iPolitics, April 3, 2014. Available online at: <http://goo.gl/zHSf4P>

Sovereignty versus status quo (Quebec only)

Q. [QUEBEC ONLY] If you were forced to choose between complete independence for Quebec from Canada or maintenance of the status quo, which would you choose?



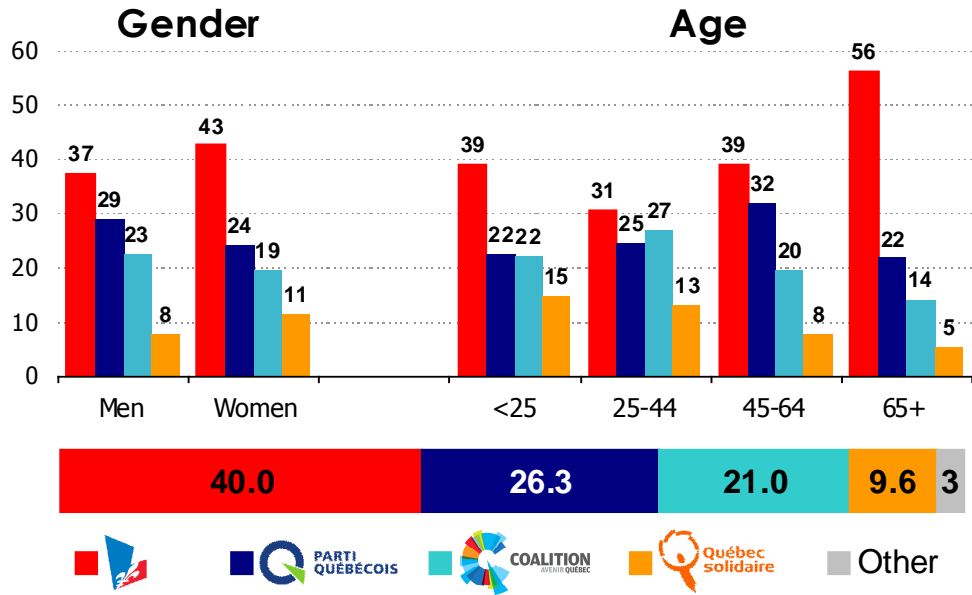
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Top Line Results:

Quebec vote intention by gender/age

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

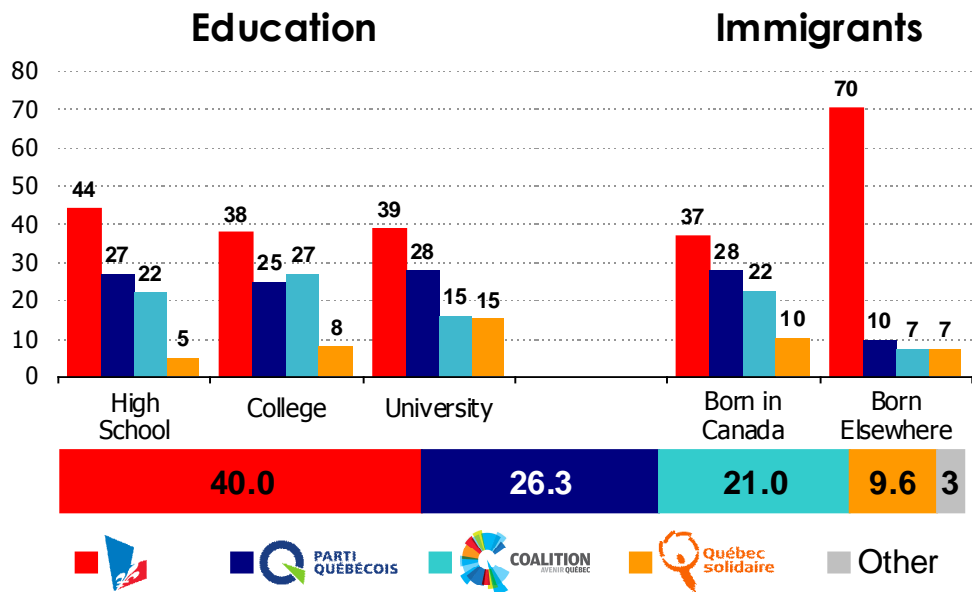


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BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)

Quebec vote intention by other demographics

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



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BASE: Residents of Quebec; March 27-April 3, 2014 (n=1,422)

Detailed Tables:

<u>Provincial vote intention (decided and leaning voters only)</u>							
<i>Q. If a provincial 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>							
	Quebec Liberal Party	Parti Québécois	Coalition Avenir Québec	Québec Solidaire	Other	Sample Size	Margin of Error (+/-)
PROVINCIALY	40.0%	26.3%	21.0%	9.6%	3.1%	1339	2.7
GENDER							
Male	37.3%	28.8%	22.6%	7.8%	3.5%	704	3.7
Female	42.6%	24.0%	19.4%	11.4%	2.7%	632	3.9
AGE							
<25	38.9%	22.4%	22.1%	14.9%	1.7%	43	14.9
25-44	30.7%	24.6%	26.7%	13.1%	4.9%	359	5.2
45-64	39.0%	31.7%	19.6%	7.5%	2.1%	556	4.2
65+	56.3%	21.7%	14.1%	5.2%	2.8%	373	5.1
EDUCATION							
High school or less	43.9%	26.8%	21.9%	4.5%	3.0%	247	6.2
College or CEGEP	37.5%	24.8%	26.7%	7.8%	3.2%	442	4.7
University or higher	38.9%	27.6%	15.4%	15.0%	3.1%	644	3.9
COUNTRY OF BIRTH							
Canada	37.0%	27.9%	22.4%	9.9%	2.8%	1204	2.8
Other	70.4%	9.6%	7.0%	7.2%	5.7%	131	8.6
VOTE IN 2012 QC ELECTION							
Did not vote	51.0%	19.7%	16.0%	8.0%	5.2%	128	8.7
Quebec Liberal Party	83.8%	5.8%	7.2%	2.3%	0.9%	434	4.7
Parti Québécois	7.4%	61.1%	18.5%	11.3%	1.7%	404	4.9
Coalition Avenir Québec	26.8%	9.2%	55.2%	4.3%	4.5%	227	6.5
Québec Solidaire	27.9%	9.9%	6.5%	54.7%	1.0%	86	10.6
Other	11.0%	25.1%	31.4%	4.9%	27.6%	37	16.1
FEDERAL VOTE INTENTION							
Liberal Party	81.2%	5.4%	8.4%	3.5%	1.6%	453	4.6
Conservative Party	47.2%	9.7%	37.1%	1.9%	4.2%	207	6.8
NDP	17.7%	23.2%	34.3%	21.2%	3.5%	321	5.5
Green Party	16.5%	19.3%	13.6%	38.3%	12.2%	46	14.5
Bloc Québécois	2.5%	79.6%	10.4%	5.1%	2.4%	240	6.3



Provincial vote intention (decided and leaning voters only) (continued)

*Q. If a provincial 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?*

	Quebec Liberal Party	Parti Québécois	Coalition Avenir Québec	Québec Solidaire	Other	Sample Size	Margin of Error (+/-)
PROVINCIALLY	40.0%	26.3%	21.0%	9.6%	3.1%	1339	2.7
REGION							
Off-island Montreal suburbs	30.3%	28.8%	27.4%	9.2%	4.4%	369	5.1
Montreal Island	47.5%	20.3%	14.4%	15.3%	2.5%	354	5.2
Eastern Quebec	38.7%	29.1%	23.2%	5.7%	3.4%	377	5.1
Central/West/North Quebec	46.4%	26.6%	17.2%	8.2%	1.5%	239	6.3


Federal vote intention (decided and leaning voters only) (Quebec only)

*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?*

	Liberal Party	Conservative Party	NDP	Green Party	Bloc Québécois	Other	Sample Size	Margin of Error (+/-)
PROVINCIALY	34.7%	15.4%	24.3%	4.7%	18.7%	2.2%	1333	2.7
GENDER								
Male	31.2%	18.2%	24.5%	3.2%	20.6%	2.2%	698	3.7
Female	38.0%	12.7%	24.3%	6.2%	16.8%	2.2%	631	3.9
AGE								
<25	42.4%	8.1%	19.2%	10.3%	16.0%	4.0%	42	15.1
25-44	25.3%	17.1%	31.6%	5.0%	18.2%	2.8%	354	5.2
45-64	34.7%	15.4%	21.5%	3.8%	22.8%	1.7%	557	4.2
65+	44.7%	16.2%	21.3%	3.3%	13.2%	1.3%	372	5.1
EDUCATION								
High school or less	40.3%	14.4%	15.6%	4.8%	22.2%	2.7%	248	6.2
College or CEGEP	31.5%	18.6%	27.0%	3.3%	17.2%	2.4%	436	4.7
University or higher	33.0%	13.3%	28.9%	5.9%	17.3%	1.6%	642	3.9
COUNTRY OF BIRTH								
Canada	32.0%	15.3%	25.3%	5.0%	20.0%	2.4%	1198	2.8
Other	62.1%	16.5%	14.6%	2.1%	4.7%	0.0%	130	8.6
QUEBEC VOTE INTENTION								
Quebec Liberal Party	68.3%	18.0%	10.5%	1.6%	1.2%	0.5%	547	4.2
Parti Québécois	7.2%	5.9%	21.9%	2.9%	59.2%	2.9%	345	5.3
Coalition Avenir Québec	14.5%	29.0%	41.9%	2.6%	10.0%	2.0%	239	6.3
Québec Solidaire	12.5%	3.1%	53.8%	15.3%	10.2%	5.1%	118	9.0
Other	17.4%	20.7%	27.5%	14.9%	14.7%	4.8%	39	15.7


Most Important Election Issue (Quebec only)

Q. Of the following issues, which one do you think should be the most important issue for the next federal election?

	Issues like ethics and accountability	The economy, jobs, and growth	Fiscal issues like taxes and debt	Social issues like health and education	DK/NR	Sample Size	Margin of Error (+/-)
PROVINCIALY	6.6%	41.9%	12.0%	37.0%	2.4%	1422	2.6
GENDER							
Male	7.7%	46.5%	15.3%	28.2%	2.4%	734	3.6
Female	5.6%	38.1%	9.0%	45.8%	1.5%	679	3.8
AGE							
<25	6.0%	33.1%	10.9%	44.5%	5.6%	49	14.0
25-44	5.8%	37.1%	11.3%	44.7%	1.1%	380	5.0
45-64	6.4%	47.4%	11.7%	32.4%	2.1%	588	4.0
65+	8.5%	45.8%	14.1%	30.7%	1.0%	390	5.0
EDUCATION							
High school or less	4.7%	43.6%	13.4%	36.1%	2.2%	271	6.0
College or CEGEP	6.2%	45.4%	11.7%	36.2%	0.6%	461	4.6
University or higher	8.6%	38.4%	11.2%	39.2%	2.7%	676	3.8
COUNTRY OF BIRTH							
Canada	6.5%	41.8%	12.3%	37.3%	2.0%	1272	2.8
Other	7.3%	45.7%	8.6%	37.7%	0.6%	139	8.3
QUEBEC VOTE INTENTION							
Quebec Liberal Party	6.7%	55.6%	11.2%	25.8%	0.7%	558	4.2
Parti Québécois	8.6%	29.0%	11.9%	48.9%	1.6%	359	5.2
Coalition Avenir Québec	3.1%	44.6%	18.2%	31.9%	2.3%	258	6.1
Québec Solidaire	9.8%	22.6%	5.3%	61.5%	0.7%	124	8.8
Other	14.5%	28.2%	10.0%	38.2%	9.0%	40	15.5

Quebec Sovereignty (Quebec only)

Q. Ideally, which of the following four options would you prefer for Québec?

	Complete independence from the rest of Canada	Sovereignty-association	Decentralized federalism	The status quo	None of the above	DK/NR	Sample Size	Margin of Error (+/-)
PROVINCIALLY	16.9%	16.1%	21.6%	23.8%	20.1%	1.4%	1422	2.6
GENDER								
Male	18.7%	17.0%	24.5%	25.3%	13.7%	0.8%	734	3.6
Female	15.5%	15.5%	19.0%	22.7%	26.4%	0.9%	679	3.8
AGE								
<25	18.2%	12.3%	19.0%	16.7%	33.8%	0.0%	49	14.0
25-44	19.2%	15.9%	19.4%	24.5%	19.6%	1.4%	380	5.0
45-64	17.4%	18.4%	22.2%	24.0%	17.6%	0.5%	588	4.0
65+	12.6%	15.3%	25.7%	27.2%	18.9%	0.3%	390	5.0
EDUCATION								
High school or less	19.3%	10.9%	16.8%	19.1%	33.4%	0.4%	271	6.0
College or CEGEP	16.2%	17.4%	19.6%	27.5%	18.3%	0.9%	461	4.6
University or higher	16.1%	19.6%	27.5%	25.0%	11.0%	0.9%	676	3.8
COUNTRY OF BIRTH								
Canada	18.1%	17.2%	21.1%	23.2%	19.5%	0.9%	1272	2.8
Other	6.2%	6.9%	27.9%	32.3%	26.6%	0.0%	139	8.3
QUEBEC VOTE INTENTION								
Quebec Liberal Party	1.9%	3.9%	32.7%	37.8%	23.4%	0.3%	558	4.2
Parti Québécois	42.8%	36.0%	5.3%	5.7%	10.2%	0.0%	359	5.2
Coalition Avenir Québec	8.0%	14.7%	28.5%	26.5%	20.8%	1.5%	258	6.1
Québec Solidaire	25.6%	26.0%	16.8%	13.6%	16.4%	1.6%	124	8.8
Other	28.1%	13.6%	15.7%	19.8%	22.9%	0.0%	40	15.5



Sovereignty versus Status Quo (Quebec only)

Q. If you were forced to choose between complete independence for Quebec from Canada or maintenance of the status quo, which would you choose?

	Complete independence from the rest of Canada	The status quo	DK/NR	Sample Size	Margin of Error (+/-)
PROVINCIALY	32.4%	65.2%	2.4%	1422	2.6
GENDER					
Male	39.2%	59.1%	1.7%	734	3.6
Female	26.4%	71.6%	2.0%	679	3.8
AGE					
<25	42.9%	54.3%	2.8%	49	14.0
25-44	33.4%	65.3%	1.3%	380	5.0
45-64	33.5%	64.5%	2.0%	588	4.0
65+	24.4%	73.8%	1.8%	390	5.0
EDUCATION					
High school or less	32.9%	63.7%	3.3%	271	6.0
College or CEGEP	32.0%	67.2%	0.8%	461	4.6
University or higher	33.2%	65.5%	1.3%	676	3.8
COUNTRY OF BIRTH					
Canada	35.1%	63.1%	1.8%	1272	2.8
Other	8.1%	90.4%	1.5%	139	8.3
QUEBEC VOTE INTENTION					
Quebec Liberal Party	5.2%	93.0%	1.8%	558	4.2
Parti Québécois	76.6%	22.6%	0.8%	359	5.2
Coalition Avenir Québec	22.5%	76.4%	1.0%	258	6.1
Québec Solidaire	50.0%	50.0%	0.0%	124	8.8
Other	37.3%	60.9%	1.8%	40	15.5



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 1,422 Quebec residents aged 18 and over responded to the survey (including a sub-sample of 1,339 decided voters). The margin of error associated with the total sample is +/-2.6 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 sex, age, education and region). All the data have been statistically weighted by **gender, age, and education** to ensure the sample's composition reflects that of the actual population of Quebec according to Census data.