

BUDGET LANDS WITH A THUD AS VOTERS' INTENTIONS LOCKED IN

[Ottawa – May 1, 2015] Overall, vote intention seems frozen in amber as the three lead parties have been stuck oscillating within tiny ranges over the past few weeks. While nothing is changing in aggregate, there are interesting shifts in certain segments which seem to reflect the impact of a highly visible budget that was forcefully communicated to Canadians through all of the communication tools available to an incumbent. Yet even now, we see that attention is flagging. The Conservatives are hanging on to a just barely significant lead over Justin Trudeau's Liberals – well short of the levels they would need to repeat their majority.

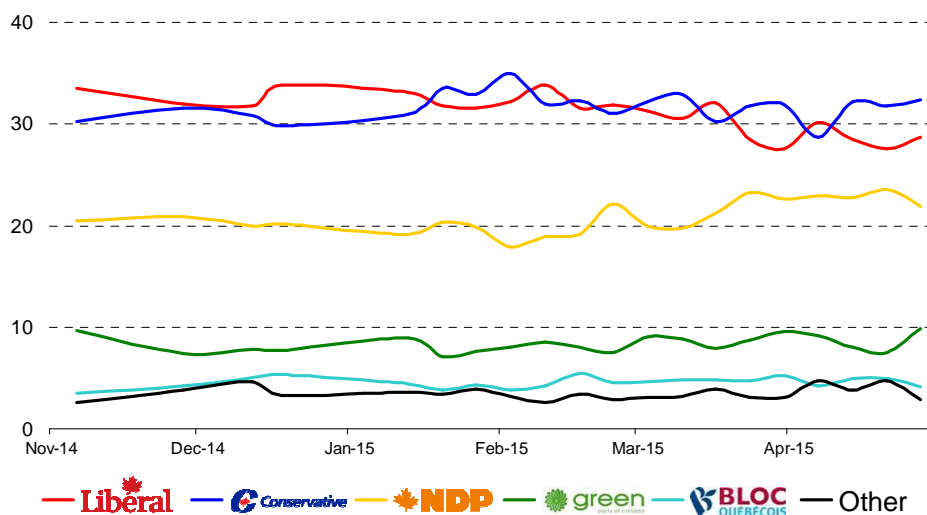
Federal vote intention

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

National Results



2011 Election Results

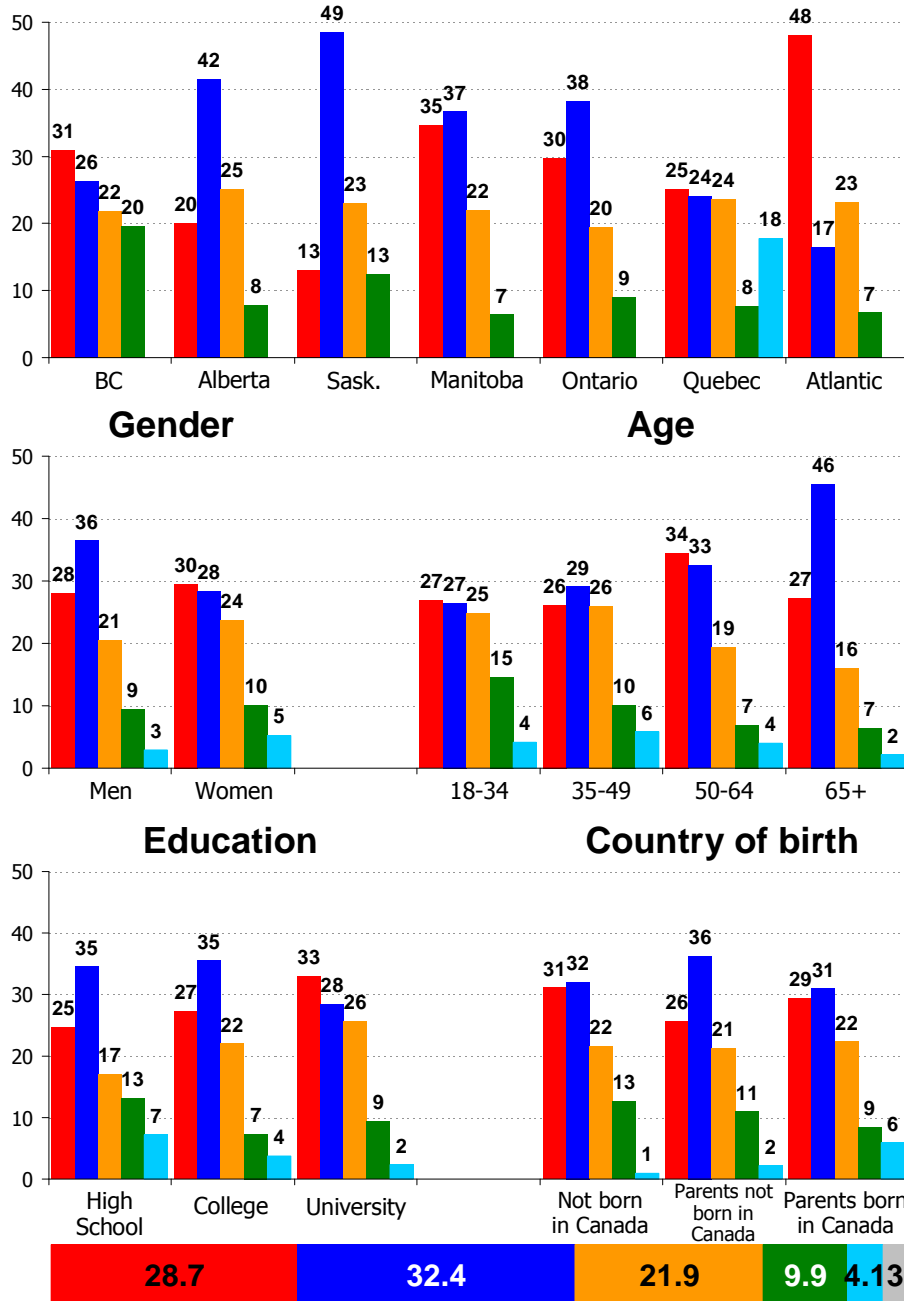


Note: The data on federal vote intention are based on decided and leaning voters only.
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BASE: Canadians; April 22-28, 2015 (n=3,757), MOE +/- 1.6%, 19 times out of 20

Vote intention by key demographics

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



Liberal
 Conservative
 NDP
 Green
 BLOC
 Other

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BASE: Canadians; April 22-28, 2015 (n=3,757), MOE +/- 1.6%, 19 times out of 20

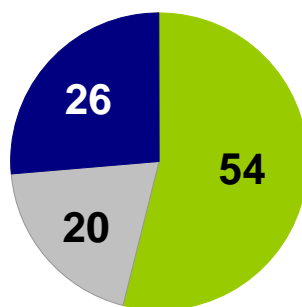
Responses to budget largely range from yawns to raspberries

The budget was highly visible; this is evident in that three-quarters of Canadians say they recall hearing about it and it is reinforced by the high level of attention to budget announcements that we noted last week.¹ The fact that there has been no net change on vote intention is *not* because Canadians are simply not paying attention (quite the opposite, in fact). The budget is simply not having an overall effect.

Attitudes to budget

Awareness

Q. The government of Canada tabled its annual budget on April 21st. Would you say that you clearly recall, vaguely recall, or do not recall hearing about it?



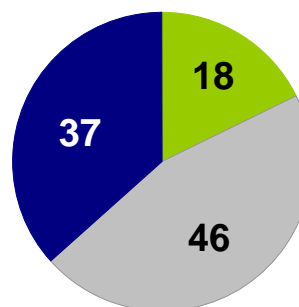
■ Yes, clearly
 ■ Yes, vaguely
 ■ No / Skip

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Approval*

Q. [IF YES, CLEARLY/YES, VAGUELY] Overall, how would you rate this budget?

IF YES
 (n=3,019)



■ Good (4-5)
 ■ Neither (3)
 ■ Bad (1-2)

* Figures adjusted to exclude those who did not provide valid responses.
 BASE: Canadians; April 22-28, 2015 (n=3,757), MOE +/- 1.6%, 19 times out of 20

Overall, the budget was not well received. While it was not a disaster, responses were underwhelming, and negative reactions outnumber positive ones by a margin of 2-to-1. Furthermore, not only was the budget poorly (or indifferently) rated, it's seen as having almost no positive consequences for average Canadians. A clear majority of Canadians see the budget as having no effect and of those who do, most see themselves as being worse off. On both indicators, this budget fares worse when compared to the 2010 budget.²

Indeed, for all the effort and framing and communication that went into this budget, the fact that it has failed to create so much as a ripple in the voter landscape has to be a source of considerable concern for the Conservative Party.

¹ EKOS Research Associates, "Conservative Hang on to Narrow Lead", April 24, 2015. Available online at: <http://goo.gl/XHRrmu>

² EKOS Research Associates, "Budget Creates Barely a Ripple", March 11, 2010. Available online at: <http://goo.gl/f7J20o>

Approval of budget: 2015 vs. 2010

Q. [IF YES, CLEARLY/YES, VAGUELY] Overall, how would you rate this budget?

2015



BASE: Canadians who are aware of the budget; April 22-28, 2015 (n=3,019), MOE +/- 1.8%, 19 times out of 20

2010



BASE: Canadians who are aware of the budget; March 3-10, 2010 (n=1,635), MOE +/- 2.4%, 19 times out of 20

■ Bad (1-2) ■ Neither (3) ■ Good (4-5)

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

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Impact of budget: 2015 vs. 2010

Q. [IF YES, CLEARLY/YES, VAGUELY] What do you think will be the OVERALL impact of this budget for you and your family?

2015



BASE: Canadians who are aware of the budget; April 22-28, 2015 (n=3,019), MOE +/- 1.8%, 19 times out of 20

2010



BASE: Canadians who are aware of the budget; March 3-10, 2010 (n=1,635), MOE +/- 2.4%, 19 times out of 20

■ Worse (1-2) ■ No change (3) ■ Better off (4-5)

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

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Continued shift of seniors to Conservatives: gerontocracy redux?

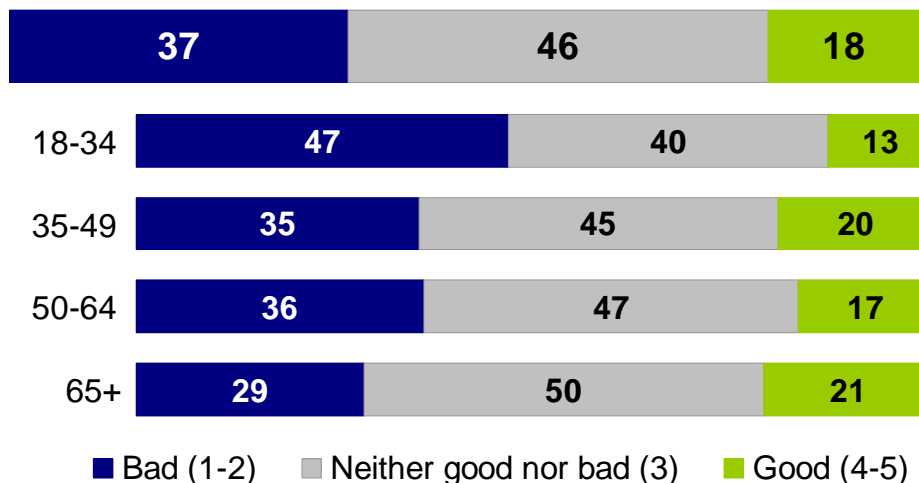
Despite a rather blasé response from Canadians in general, the budget appears to have worked relatively well with seniors. While the reaction from seniors was lukewarm at best, seniors are less likely to disapprove of the budget and are least likely to see it as having a negative impact on their personal outcome.

Could this be improving the Conservative Party's already strong fortunes with seniors? The answer is most likely yes, and the profound nine-month movement of seniors to the Conservatives is by far the most important dynamic in an otherwise placid voter landscape. Indeed, the generational fault lines across seniors and pretty well everyone else have never been larger. Almost half of seniors are going Conservative and hence they are exerting enormous influence over the political future. Pretty much everywhere else, however, the budget has been received quite poorly. Outside of seniors, Conservatives are nowhere near to forming a stable government.

Approval of 2015 budget by age

Q. [IF YES, CLEARLY/YES, VAGUELY] Overall, how would you rate this budget?

Overall



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

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BASE: Canadians who are aware of the budget; April 22-28, 2015 (n=3,019), MOE +/- 1.8%, 19 times out of 20

In any case, attention to economic announcements appears to be declining, which suggests that the current government's ability to hold public attention with tax breaks and announcements about the budget is beginning to wane. Again, this does not augur well for the current government's future.

Public attention to budget announcements

Q. There are number of issues of the day that Canadians are following. How closely are you following each of the following issues or events? **Government announcements of tax measures and other plans to improve the economy, including the budget.**

Week of April 22-28



BASE: Canadians (half-sample); April 22-28, 2015 (n=1,853), MOE +/- 2.3%, 19 times out of 20

Week of April 16-21



BASE: Canadians (half-sample); April 16-21, 2015 (n=1,487), MOE +/- 2.5%, 19 times out of 20

DK/NR Not at all Somewhat closely Very closely

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Citizen's economy is a dark and gloomy place

The government's economy is a warm and happy place, but seen through the lens of the worker, consumer, and citizen, it's a distinctly dark place and there is no evidence that the gloom is dissipating. We are tracking this issue carefully, and by all indicators everything looks awful. The rear-view mirror is dark and seems to be getting worse, while outlook on the future is equally bleak.³

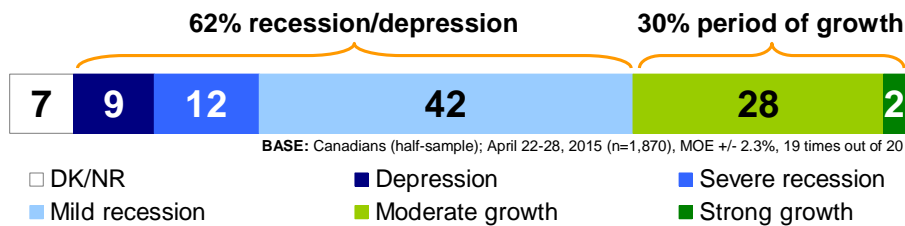
We have recently received criticism from an economist who noted that our question on current state of the economy offered three "negative" options (i.e., depression, severe recession, and mild recession), but only two "positive" ones (moderate growth and strong growth). In response, we have conducted a test where half of respondents received our standard question and the other half were a new version with a sixth "positive" option (an economic boom). We found that both versions produced similar results and, interestingly, respondents who were prompted with the economic boom option were actually *more* likely to say the economy was in a recession or depression.

³ EKOS Research Associates, "Voters Stuck", March 13, 2015. Available online at: <http://goo.gl/kXQTok>

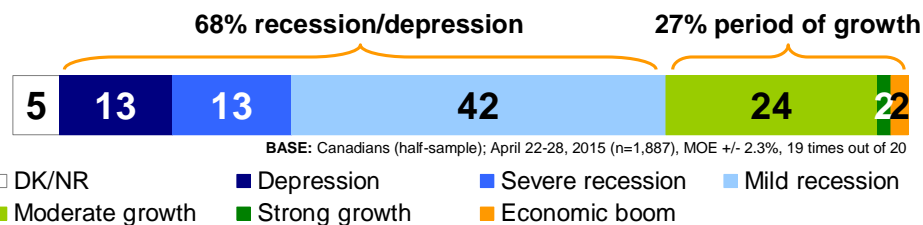
Current state of the Canadian economy

Q. Which of the following best describes how you feel about Canada's economy?

Version 1



Version 2



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Self-rated progress

Q. Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last YEAR / FIVE YEARS / TEN YEARS?

One Year



Five Years



Ten Years



DK/NR Fallen behind Stayed the same Moved ahead

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BASE: Canadians (third-sample each); April 22-28, 2015

Conclusions

The budget was and is a critical framing document for the government. It represents the culmination of many of the Government's key economic promises (balanced budget, income splitting, etc.) and hence becomes a proxy for promise delivery. It also provides a promise for the future and lays out the economic plan for the coming year(s). This budget also received extraordinary communication efforts which were clearly echoed in our sounding of where the public is drawing information and what things are registering for voters. Coming in the lead up to the fall election the stakes could not be higher for the government.

Given that, there must be some trepidation among Conservative party strategists. There was no failure of communication; the government owned the airwaves (and the tax inserts) and their messaging drowned out all other sources.⁴ Interestingly, this salience is already dropping as playoff fever rises and cottages beckon. The government may also have reached the limits of targeted goodies and inducements that it has sprinkled to key constituencies.

And what are the net results to date for these heroic efforts? Zilch. Nada. The dials didn't budge a whit. The Government sits exactly where it was for the past three weeks – mired at 32 points.

Contrary to the government's cheery economic narrative, most of Canada is registering record lows on how well they are doing compared to the past and even worse on how well they are going to do in the future.⁵ Less than one in three think we are *not* in recession and most are looking for some acknowledgement of the depths of stagnation and pessimism about the future.

The huge public concerns about declining middle class progress⁶ and rising inequality at the top aren't even given a perfunctory nod in the budget. If anything, the budget seems to signal continued pursuit of minimal government and tax relief as a strategy for restarting an economy which many see as victim of exactly those policies. The reverse Robin Hood model of targeting relatively affluent voters with tax incentives is also not playing well with the vast majority of those who see nothing or back sliding as the results of the budget. For those thinking that the moribund economy isn't an issue, please check back on Tuesday when an NDP government is installed in Alberta by a deeply anxious and angry electorate.⁷

The upside for the Government is that the opposition parties have not been able to convince the voters that they have better answers to these pressing problems. We will have to see whether the coming months will see an opening for them to grab the microphone and communicate their

⁴ EKOS Research Associates, "Conservative Hang on to Narrow Lead", April 24, 2015. Available online at: <http://goo.gl/XHRrmu>

⁵ EKOS Research Associates, "Voters Stuck", March 13, 2015. Available online at: <http://goo.gl/kXOTok>

⁶ EKOS Research Associates, "Liberals rebound in Quebec as Harper's emotional connections with voters weaker", April 10, 2015. Available online at: <http://goo.gl/5IbQ07>

⁷ EKOS Research Associates, "Orange Chinook!", April 30, 2015. Available online at: <http://goo.gl/nzkuwJ>

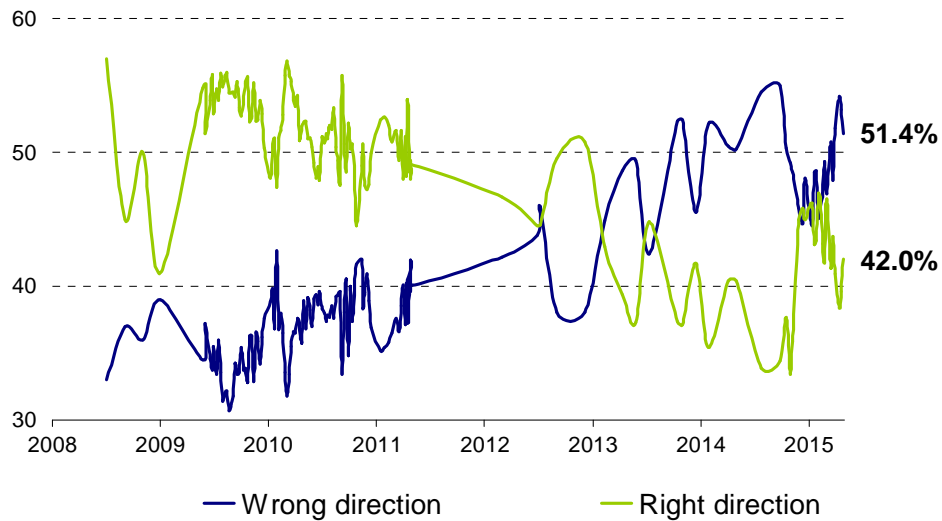


ideas and values. With the government having shot its bolt and exhausted its fiscal degrees of freedom to regroup, this will be a most interesting period in what is now a very lively electorate.

Direction of country/government

Direction of country

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

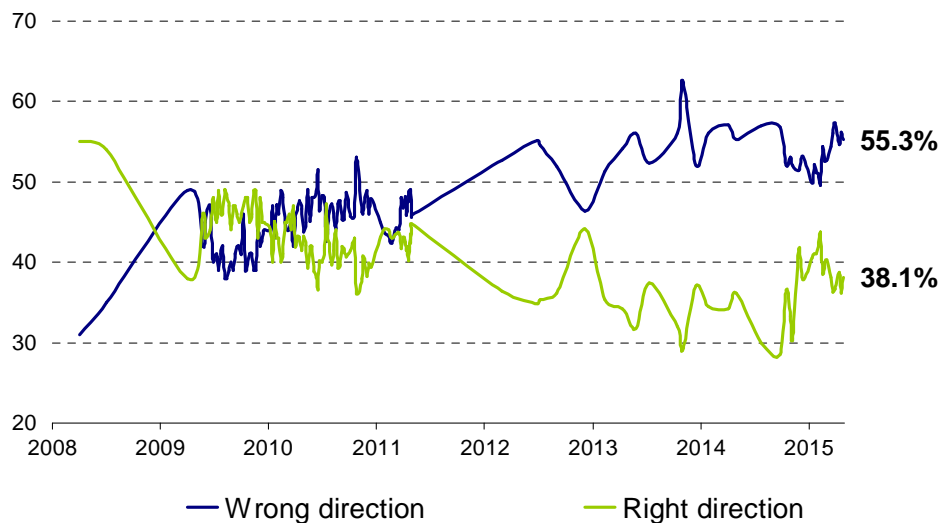


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BASE: Canadians (half-sample); April 22-28, 2015 (n=1,798), MOE +/- 2.3%, 19 times out of 20

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); April 22-28, 2015 (n=1,959), MOE +/- 2.2%, 19 times out of 20

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 Party	Conser- vative Party	NDP	Green Party	Bloc Québécois	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	28.7%	32.4%	21.9%	9.9%	4.1%	2.9%	3143	1.8
REGION								
British Columbia	30.9%	26.4%	21.9%	19.6%	–	1.1%	400	4.9
Alberta	20.1%	41.6%	25.2%	7.9%	–	5.2%	972	3.1
Saskatchewan	13.1%	48.6%	23.1%	12.5%	–	2.8%	101	9.8
Manitoba	34.7%	36.7%	22.1%	6.5%	–	0.0%	73	11.5
Ontario	29.8%	38.2%	19.5%	9.0%	–	3.4%	885	3.3
Quebec	25.2%	24.1%	23.7%	7.7%	17.8%	1.6%	403	4.9
Atlantic Canada	48.2%	16.5%	23.2%	6.7%	–	5.5%	301	5.7
GENDER								
Male	28.0%	36.4%	20.5%	9.4%	3.0%	2.7%	1598	2.5
Female	29.6%	28.3%	23.7%	10.2%	5.3%	2.9%	1517	2.5
AGE								
<35	26.9%	26.5%	24.8%	14.6%	4.1%	3.0%	244	6.3
35-49	26.1%	29.1%	26.0%	10.1%	5.8%	2.9%	627	3.9
50-64	34.4%	32.5%	19.4%	6.9%	4.0%	2.7%	1029	3.1
65+	27.3%	45.5%	16.0%	6.5%	2.2%	2.5%	1219	2.8
EDUCATION								
High school or less	24.7%	34.5%	17.1%	13.2%	7.2%	3.4%	820	3.4
College or CEGEP	27.4%	35.4%	22.0%	7.3%	3.8%	4.0%	1013	3.1
University or higher	32.9%	28.4%	25.7%	9.3%	2.4%	1.3%	1260	2.8
COUNTRY OF BIRTH								
Not born in Canada	31.1%	32.0%	21.5%	12.6%	1.0%	1.8%	541	4.2
Parents not born in Canada	25.7%	36.3%	21.2%	11.0%	2.2%	3.6%	829	3.4
Both parents born in Canada	29.3%	30.9%	22.4%	8.5%	6.0%	2.9%	1753	2.3

State of Canada's Economy (Version 1)

Q. [Half-sample only] Which of the following best describes how you feel about Canada's economy? 1.) In a depression; 2.) In a severe recession; 3.) In a mild recession; 4.) In a period of moderate growth; or 5.) in a period of strong growth?

	Depression	Severe recession	Mild recession	Moderate growth	Strong growth	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	8.9%	11.8%	41.7%	28.0%	2.4%	7.2%	1870	2.3
REGION								
British Columbia	6.7%	11.3%	43.5%	28.4%	4.4%	5.7%	239	6.3
Alberta	8.7%	9.4%	47.7%	20.9%	1.2%	12.0%	565	4.1
Saskatchewan	5.1%	11.6%	31.7%	43.8%	0.8%	6.9%	59	12.8
Manitoba	11.7%	10.6%	43.7%	28.9%	5.1%	0.0%	51	13.7
Ontario	6.1%	12.5%	43.2%	28.6%	3.2%	6.5%	535	4.2
Quebec	16.0%	10.4%	33.9%	32.2%	0.7%	6.8%	224	6.6
Atlantic Canada	7.5%	17.2%	46.2%	16.9%	1.0%	11.1%	188	7.2
GENDER								
Male	8.0%	10.7%	40.7%	35.4%	2.9%	2.4%	884	3.3
Female	10.4%	13.8%	45.9%	23.1%	2.0%	4.7%	895	3.3
AGE								
<35	13.1%	10.5%	41.0%	26.7%	2.2%	6.4%	136	8.4
35-49	8.7%	14.1%	48.1%	23.8%	2.6%	2.7%	357	5.2
50-64	9.0%	12.5%	44.7%	29.9%	1.7%	2.2%	584	4.1
65+	5.3%	10.9%	38.3%	38.7%	3.9%	2.9%	704	3.7
EDUCATION								
High school or less	12.1%	12.8%	37.9%	27.7%	3.4%	6.1%	492	4.4
College or CEGEP	7.5%	12.5%	46.3%	29.6%	1.5%	2.6%	578	4.1
University or higher	8.7%	11.2%	44.9%	30.6%	2.4%	2.1%	693	3.7
COUNTRY OF BIRTH								
Not born in Canada	11.3%	9.2%	41.5%	31.5%	2.1%	4.4%	310	5.6
Parents not born in Canada	7.3%	9.6%	46.4%	31.2%	2.2%	3.3%	489	4.4
Both parents born in Canada	9.6%	14.4%	42.9%	27.2%	2.7%	3.2%	986	3.1
CURRENT VOTE INTENTION								
Liberal Party	9.7%	15.7%	47.2%	25.0%	0.7%	1.8%	432	4.7
Conservative Party	3.7%	5.7%	35.0%	50.5%	4.1%	1.0%	598	4.0
NDP	9.2%	12.2%	57.2%	18.6%	1.1%	1.7%	312	5.6
Green Party	16.2%	10.5%	43.9%	23.0%	2.2%	4.2%	130	8.6
Bloc Québécois	5.9%	25.4%	37.4%	22.5%	1.2%	7.4%	37	16.1

State of Canada's Economy (Version 2)

Q. [Half-sample only] Which of the following best describes how you feel about Canada's economy? 1.) In a depression; 2.) In a severe recession; 3.) In a mild recession; 4.) In a period of moderate growth; 5.) In a period of strong growth; or 6.) In an economic boom?

	Depression	Severe recession	Mild recession	Moderate growth	Strong growth	Economic boom	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	12.7%	13.3%	41.9%	23.7%	1.5%	1.9%	5.0%	1887	2.3
REGION									
British Columbia	13.0%	14.5%	46.9%	19.0%	1.1%	0.5%	5.0%	237	6.4
Alberta	12.4%	12.3%	44.2%	18.2%	1.3%	1.1%	10.5%	564	4.1
Saskatchewan	9.2%	20.8%	37.4%	20.4%	0.0%	3.2%	8.9%	62	12.5
Manitoba	9.1%	6.9%	38.3%	36.3%	0.0%	9.4%	0.0%	40	15.5
Ontario	15.3%	10.6%	42.9%	24.1%	1.3%	1.7%	4.1%	537	4.2
Quebec	9.7%	17.3%	36.7%	28.1%	1.7%	2.9%	3.6%	253	6.2
Atlantic Canada	11.4%	13.6%	44.7%	18.6%	4.2%	0.5%	7.1%	194	7.0
GENDER									
Male	12.2%	13.1%	43.7%	26.2%	1.9%	1.8%	1.1%	888	3.3
Female	13.6%	14.1%	42.8%	22.8%	1.3%	2.1%	3.3%	932	3.2
AGE									
<35	17.0%	14.2%	46.6%	16.8%	0.5%	3.1%	1.8%	150	8.0
35-49	13.1%	13.9%	40.6%	27.3%	0.9%	2.0%	2.1%	363	5.1
50-64	9.1%	15.4%	47.3%	23.7%	2.0%	0.2%	2.3%	608	4.0
65+	11.5%	10.7%	35.8%	32.2%	3.6%	2.9%	3.3%	698	3.7
EDUCATION									
High school or less	15.6%	15.8%	39.1%	21.1%	2.9%	3.0%	2.6%	504	4.4
College or CEGEP	13.5%	14.5%	44.3%	23.6%	1.3%	0.8%	1.9%	589	4.0
University or higher	10.6%	11.2%	45.9%	28.0%	0.6%	2.3%	1.3%	702	3.7
COUNTRY OF BIRTH									
Not born in Canada	14.2%	12.5%	41.2%	21.6%	1.5%	5.6%	3.3%	323	5.5
Parents not born in Canada	14.4%	11.4%	42.4%	27.6%	1.1%	0.7%	2.4%	452	4.6
Both parents born in Canada	12.0%	14.7%	44.1%	24.1%	1.8%	1.4%	2.0%	1046	3.0
CURRENT VOTE INTENTION									
Liberal Party	11.6%	9.6%	52.4%	21.3%	1.3%	2.3%	1.5%	433	4.7
Conservative Party	9.9%	6.0%	38.8%	39.2%	2.4%	2.7%	1.0%	620	3.9
NDP	16.5%	17.1%	47.2%	17.8%	0.0%	0.8%	0.7%	329	5.4
Green Party	13.5%	21.9%	47.1%	13.3%	3.3%	0.4%	0.5%	120	9.0
Bloc Québécois	14.0%	25.0%	33.9%	16.9%	1.9%	0.0%	8.3%	33	17.1

Self-Rated Progress (One Year)

Q. [Third-sample only] Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the LAST YEAR?

	Fallen behind	Stayed the same	Moved ahead	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	37.1%	39.8%	17.0%	6.1%	1247	2.8
REGION						
British Columbia	42.7%	39.8%	12.1%	5.4%	162	7.7
Alberta	31.6%	39.3%	15.2%	13.8%	371	5.1
Saskatchewan	23.4%	41.1%	28.1%	7.3%	46	14.5
Manitoba	14.8%	42.7%	42.5%	0.0%	27	18.9
Ontario	35.4%	39.5%	18.3%	6.7%	335	5.4
Quebec	44.5%	38.9%	15.0%	1.6%	171	7.5
Atlantic Canada	33.5%	42.1%	13.6%	10.8%	131	8.6
GENDER						
Male	36.6%	42.2%	18.9%	2.2%	573	4.1
Female	40.9%	40.3%	16.7%	2.0%	612	4.0
AGE						
<35	34.8%	41.9%	21.0%	2.4%	95	10.1
35-49	41.5%	36.6%	20.6%	1.3%	237	6.4
50-64	45.0%	38.8%	14.6%	1.6%	396	4.9
65+	32.2%	50.4%	12.3%	5.1%	459	4.6
EDUCATION						
High school or less	45.8%	37.3%	13.7%	3.2%	333	5.4
College or CEGEP	38.5%	44.8%	15.1%	1.6%	389	5.0
University or higher	33.4%	42.2%	23.4%	1.1%	455	4.6
COUNTRY OF BIRTH						
Not born in Canada	40.3%	43.4%	13.4%	2.8%	203	6.9
Parents not born in Canada	41.1%	33.2%	22.2%	3.5%	295	5.7
Both parents born in Canada	36.9%	44.3%	17.3%	1.5%	692	3.7
CURRENT VOTE INTENTION						
Liberal Party	39.4%	48.8%	10.7%	1.0%	300	5.7
Conservative Party	22.3%	47.2%	28.8%	1.7%	393	4.9
NDP	53.6%	34.0%	11.6%	0.8%	200	6.9
Green Party	43.2%	29.7%	20.7%	6.4%	95	10.1
Bloc Québécois	52.2%	44.9%	2.8%	0.0%	23	20.4

Self-Rated Progress (Five Years)

Q. [Third-sample only] Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last FIVE years?

	Fallen behind	Stayed the same	Moved ahead	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	36.7%	36.3%	22.4%	4.6%	1219	2.8
REGION						
British Columbia	40.3%	31.7%	21.4%	6.5%	160	7.8
Alberta	37.4%	28.7%	26.3%	7.6%	369	5.1
Saskatchewan	27.3%	30.0%	32.0%	10.7%	38	15.9
Manitoba	39.5%	29.4%	31.0%	0.0%	29	18.2
Ontario	33.5%	39.2%	24.3%	3.0%	349	5.3
Quebec	37.1%	41.7%	17.8%	3.4%	161	7.7
Atlantic Canada	44.6%	30.6%	15.3%	9.4%	111	9.3
GENDER						
Male	35.6%	36.0%	27.3%	1.2%	597	4.0
Female	39.8%	39.2%	19.0%	2.0%	580	4.1
AGE						
<35	34.1%	32.4%	32.6%	0.9%	82	10.8
35-49	38.2%	31.9%	27.7%	2.1%	236	6.4
50-64	41.4%	40.7%	17.0%	0.9%	389	5.0
65+	36.1%	47.8%	13.9%	2.3%	466	4.5
EDUCATION						
High school or less	44.9%	39.5%	15.2%	0.5%	315	5.5
College or CEGEP	41.0%	32.5%	24.4%	2.0%	394	4.9
University or higher	28.9%	40.5%	28.9%	1.8%	448	4.6
COUNTRY OF BIRTH						
Not born in Canada	34.0%	41.4%	24.2%	0.3%	225	6.5
Parents not born in Canada	37.1%	37.8%	23.5%	1.7%	300	5.7
Both parents born in Canada	39.9%	35.7%	22.3%	2.1%	645	3.9
CURRENT VOTE INTENTION						
Liberal Party	40.8%	39.5%	19.2%	0.5%	274	5.9
Conservative Party	28.5%	35.5%	35.4%	0.6%	396	4.9
NDP	36.9%	47.8%	13.6%	1.7%	228	6.5
Green Party	50.7%	26.9%	19.3%	3.1%	80	11.0
Bloc Québécois	56.7%	27.1%	14.0%	2.2%	21	21.4

Self-Rated Progress (Ten Years)

Q. [Third-sample only] Thinking about your personal financial situation, would you say you have moved ahead, stayed the same, or fallen behind over the last TEN years?

	Fallen behind	Stayed the same	Moved ahead	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	35.5%	30.7%	27.3%	6.6%	1291	2.7
REGION						
British Columbia	33.0%	32.6%	30.5%	4.0%	154	7.9
Alberta	29.8%	24.9%	34.5%	10.7%	389	5.0
Saskatchewan	29.4%	16.9%	45.0%	8.6%	37	16.1
Manitoba	48.0%	21.8%	27.6%	2.7%	35	16.6
Ontario	41.7%	27.3%	24.1%	6.9%	388	5.0
Quebec	24.8%	44.0%	25.7%	5.5%	145	8.1
Atlantic Canada	39.1%	30.1%	24.9%	6.0%	140	8.3
GENDER						
Male	34.1%	31.8%	32.5%	1.6%	602	4.0
Female	38.6%	31.6%	24.3%	5.4%	635	3.9
AGE						
<35	30.1%	22.3%	41.0%	6.6%	109	9.4
35-49	36.8%	31.1%	29.4%	2.7%	247	6.2
50-64	43.9%	36.5%	17.8%	1.8%	407	4.9
65+	35.4%	40.2%	21.1%	3.4%	477	4.5
EDUCATION						
High school or less	38.0%	33.3%	23.4%	5.3%	348	5.3
College or CEGEP	39.8%	30.3%	28.6%	1.3%	384	5.0
University or higher	33.1%	31.8%	31.7%	3.5%	492	4.4
COUNTRY OF BIRTH						
Not born in Canada	37.7%	23.0%	30.3%	9.0%	205	6.8
Parents not born in Canada	36.8%	32.6%	26.0%	4.6%	346	5.3
Both parents born in Canada	35.8%	33.5%	28.4%	2.3%	695	3.7
CURRENT VOTE INTENTION						
Liberal Party	40.3%	29.3%	28.6%	1.7%	291	5.7
Conservative Party	24.2%	35.0%	38.6%	2.3%	429	4.7
NDP	47.4%	32.6%	17.5%	2.5%	213	6.7
Green Party	36.4%	30.8%	30.4%	2.4%	75	11.3
Bloc Québécois	28.2%	45.3%	26.6%	0.0%	26	19.2

Awareness of Federal Budget

Q. The government of Canada tabled its annual budget on April 21st. Would you say that you clearly recall, vaguely recall, or do not recall hearing about it?

	Yes, clearly recall	Yes, vaguely recall	No, do not recall	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	54.0%	19.7%	21.1%	5.2%	3757	1.6
REGION						
British Columbia	52.4%	16.9%	26.1%	4.6%	476	4.5
Alberta	51.8%	19.6%	18.1%	10.5%	1129	2.9
Saskatchewan	51.9%	22.3%	17.8%	8.0%	121	8.9
Manitoba	42.3%	17.7%	40.1%	0.0%	91	10.3
Ontario	56.5%	17.4%	21.5%	4.6%	1072	3.0
Quebec	53.5%	25.8%	17.6%	3.1%	477	4.5
Atlantic Canada	53.7%	18.1%	19.5%	8.6%	382	5.0
GENDER						
Male	59.6%	17.7%	21.2%	1.5%	1772	2.3
Female	52.0%	22.9%	22.4%	2.7%	1827	2.3
AGE						
<35	38.5%	20.1%	37.8%	3.7%	286	5.8
35-49	54.5%	22.3%	22.0%	1.2%	720	3.7
50-64	65.9%	20.1%	12.7%	1.3%	1192	2.8
65+	67.5%	18.7%	11.9%	1.9%	1402	2.6
EDUCATION						
High school or less	41.9%	21.6%	33.5%	2.9%	996	3.1
College or CEGEP	54.4%	24.6%	19.8%	1.2%	1167	2.9
University or higher	67.5%	16.5%	14.8%	1.2%	1395	2.6
COUNTRY OF BIRTH						
Not born in Canada	46.2%	20.2%	30.8%	2.9%	633	3.9
Parents not born in Canada	59.4%	18.7%	19.2%	2.8%	941	3.2
Both parents born in Canada	57.4%	21.0%	20.0%	1.5%	2032	2.2
CURRENT VOTE INTENTION						
Liberal Party	61.1%	20.0%	18.7%	0.2%	865	3.3
Conservative Party	62.7%	22.8%	13.2%	1.3%	1218	2.8
NDP	58.5%	17.3%	23.8%	0.4%	641	3.9
Green Party	42.9%	19.3%	33.3%	4.5%	250	6.2
Bloc Québécois	63.1%	15.2%	20.8%	1.0%	70	11.7

Approval of Budget

Q. [If following the budget] Overall, how would you rate this budget? Please use a 5-point scale where 1 means terrible, 5 means excellent and 3 means neither good nor bad.

	Bad (1-2)	Neither (3)	Good (4-5)	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	35.9%	44.6%	17.4%	2.1%	3019	1.8
REGION						
British Columbia	39.7%	44.2%	14.6%	1.6%	369	5.1
Alberta	31.8%	42.7%	22.8%	2.7%	911	3.3
Saskatchewan	28.7%	42.9%	27.0%	1.4%	97	10.0
Manitoba	46.6%	28.2%	25.2%	0.0%	68	11.9
Ontario	35.2%	43.9%	19.3%	1.7%	866	3.3
Quebec	35.3%	49.1%	13.5%	2.0%	393	4.9
Atlantic Canada	40.9%	44.3%	10.7%	4.1%	307	5.6
GENDER						
Male	35.8%	42.0%	21.2%	1.0%	1507	2.5
Female	36.0%	47.7%	13.6%	2.7%	1483	2.5
AGE						
<35	45.8%	39.4%	13.0%	1.7%	175	7.4
35-49	34.5%	43.9%	19.0%	2.5%	554	4.2
50-64	35.6%	46.2%	16.8%	1.4%	1034	3.1
65+	28.1%	49.2%	20.9%	1.7%	1226	2.8
EDUCATION						
High school or less	33.4%	49.3%	15.6%	1.7%	734	3.6
College or CEGEP	34.0%	46.7%	16.7%	2.6%	978	3.1
University or higher	39.3%	40.5%	19.0%	1.2%	1252	2.8
COUNTRY OF BIRTH						
Not born in Canada	35.5%	49.0%	13.9%	1.6%	485	4.5
Parents not born in Canada	37.1%	40.4%	20.5%	2.0%	799	3.5
Both parents born in Canada	35.7%	45.0%	17.2%	2.0%	1710	2.4
CURRENT VOTE INTENTION						
Liberal Party	47.3%	46.2%	5.9%	0.6%	751	3.6
Conservative Party	11.0%	44.3%	42.2%	2.4%	1084	3.0
NDP	53.3%	40.2%	5.6%	0.9%	535	4.2
Green Party	48.6%	39.1%	10.1%	2.2%	186	7.2
Bloc Québécois	61.0%	36.9%	0.0%	2.1%	57	13.0

Impact of Budget

Q. [If following the budget] What do you think will be the OVERALL impact of this budget for you and your family? Please respond using a 5-point scale where 1 means much worse off, 5 means much better off and the mid-point 3 means no change.

	Worse off (1-2)	Neither (3)	Better off (4-5)	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	29.4%	55.1%	13.2%	2.3%	3019	1.8
REGION						
British Columbia	32.4%	52.2%	12.2%	3.2%	369	5.1
Alberta	32.1%	49.9%	15.4%	2.6%	911	3.3
Saskatchewan	23.8%	55.4%	20.2%	0.5%	97	10.0
Manitoba	32.1%	51.2%	15.4%	1.3%	68	11.9
Ontario	27.0%	55.3%	15.9%	1.8%	866	3.3
Quebec	30.6%	59.5%	7.8%	2.1%	393	4.9
Atlantic Canada	29.9%	54.5%	12.2%	3.4%	307	5.6
GENDER						
Male	26.8%	57.2%	14.6%	1.3%	1507	2.5
Female	32.1%	53.3%	11.8%	2.8%	1483	2.5
AGE						
<35	34.8%	50.0%	12.8%	2.4%	175	7.4
35-49	30.0%	53.6%	13.6%	2.8%	554	4.2
50-64	31.2%	54.7%	12.7%	1.4%	1034	3.1
65+	21.1%	62.9%	14.3%	1.7%	1226	2.8
EDUCATION						
High school or less	29.7%	59.3%	9.4%	1.6%	734	3.6
College or CEGEP	32.2%	53.3%	12.3%	2.2%	978	3.1
University or higher	27.2%	54.4%	16.3%	2.1%	1252	2.8
COUNTRY OF BIRTH						
Not born in Canada	24.4%	57.4%	15.9%	2.3%	485	4.5
Parents not born in Canada	27.6%	55.4%	15.3%	1.7%	799	3.5
Both parents born in Canada	31.4%	54.7%	11.6%	2.3%	1710	2.4
CURRENT VOTE INTENTION						
Liberal Party	35.6%	56.1%	7.3%	1.0%	751	3.6
Conservative Party	8.4%	60.9%	28.1%	2.5%	1084	3.0
NDP	43.5%	51.2%	3.9%	1.4%	535	4.2
Green Party	40.0%	46.5%	10.5%	3.0%	186	7.2
Bloc Québécois	54.7%	41.8%	1.4%	2.1%	57	13.0

Public Attention to Budget Announcements

Q. [Half-sample only] There are number of issues of the day that Canadians are following. How closely are you following each of the following issues or events? Government announcements of tax measures and other plans to improve the economy, including the budget.

	Not at all	Somewhat closely	Very closely	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	18.7%	53.4%	22.3%	5.6%	1853	2.3
REGION						
British Columbia	18.4%	51.9%	23.9%	5.8%	251	6.2
Alberta	15.1%	51.8%	24.5%	8.6%	552	4.2
Saskatchewan	25.7%	46.0%	16.7%	11.7%	60	12.7
Manitoba	24.4%	57.0%	16.3%	2.3%	38	15.9
Ontario	13.0%	53.1%	28.7%	5.1%	521	4.3
Quebec	26.1%	57.1%	13.5%	3.3%	245	6.3
Atlantic Canada	24.8%	47.2%	18.2%	9.7%	181	7.3
GENDER						
Male	17.0%	57.4%	24.8%	0.9%	883	3.3
Female	21.2%	53.3%	21.5%	4.0%	899	3.3
AGE						
<35	26.0%	47.3%	21.6%	5.0%	132	8.5
35-49	20.8%	58.4%	19.0%	1.8%	350	5.2
50-64	14.5%	59.5%	24.8%	1.3%	602	4.0
65+	13.9%	54.9%	28.2%	2.9%	700	3.7
EDUCATION						
High school or less	26.9%	51.6%	16.8%	4.7%	496	4.4
College or CEGEP	19.8%	58.7%	19.6%	1.8%	578	4.1
University or higher	13.1%	55.1%	30.7%	1.1%	693	3.7
COUNTRY OF BIRTH						
Not born in Canada	23.4%	48.4%	23.9%	4.3%	305	5.6
Parents not born in Canada	17.2%	54.7%	24.0%	4.1%	462	4.6
Both parents born in Canada	18.8%	57.5%	22.0%	1.7%	1021	3.1
CURRENT VOTE INTENTION						
Liberal Party	16.0%	54.9%	27.4%	1.7%	441	4.7
Conservative Party	13.3%	59.4%	26.3%	1.0%	610	4.0
NDP	19.2%	56.7%	23.6%	0.5%	309	5.6
Green Party	23.8%	46.3%	26.5%	3.3%	124	8.8
Bloc Québécois	30.3%	58.9%	1.1%	9.7%	33	17.1

Direction of Country

Q. [Half-sample only] 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	42.0%	51.4%	6.6%	1798	2.3
REGION					
British Columbia	39.1%	55.5%	5.4%	231	6.5
Alberta	49.0%	37.9%	13.2%	543	4.2
Saskatchewan	49.3%	42.5%	8.2%	58	12.9
Manitoba	49.4%	50.6%	0.0%	42	15.1
Ontario	44.3%	50.2%	5.5%	499	4.4
Quebec	35.3%	59.0%	5.7%	237	6.4
Atlantic Canada	41.5%	49.6%	8.9%	184	7.2
GENDER					
Male	49.2%	47.7%	3.2%	846	3.4
Female	38.0%	58.7%	3.3%	873	3.3
AGE					
<35	37.7%	58.2%	4.1%	140	8.3
35-49	43.2%	54.0%	2.8%	361	5.2
50-64	42.5%	54.8%	2.7%	540	4.2
65+	52.4%	43.0%	4.5%	678	3.8
EDUCATION					
High school or less	43.8%	52.8%	3.4%	472	4.5
College or CEGEP	41.8%	54.2%	4.0%	548	4.2
University or higher	44.2%	53.2%	2.6%	680	3.8
COUNTRY OF BIRTH					
Not born in Canada	52.3%	45.0%	2.7%	305	5.6
Parents not born in Canada	46.1%	49.0%	4.9%	456	4.6
Both parents born in Canada	39.8%	56.9%	3.3%	960	3.2
CURRENT VOTE INTENTION					
Liberal Party	28.9%	69.2%	1.9%	422	4.8
Conservative Party	79.2%	19.6%	1.3%	579	4.1
NDP	27.0%	69.4%	3.6%	309	5.6
Green Party	30.0%	67.3%	2.6%	120	9.0
Bloc Québécois	13.4%	82.5%	4.1%	37	16.1

Direction of Government

Q. [Half-sample only] 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	38.1%	55.3%	6.6%	1959	2.2
REGION					
British Columbia	36.8%	56.7%	6.5%	245	6.3
Alberta	44.3%	46.1%	9.6%	586	4.1
Saskatchewan	43.9%	44.8%	11.3%	63	12.4
Manitoba	52.4%	41.9%	5.7%	49	14.0
Ontario	40.4%	53.3%	6.3%	573	4.1
Quebec	32.8%	63.0%	4.2%	240	6.3
Atlantic Canada	25.1%	65.9%	9.0%	198	7.0
GENDER					
Male	44.9%	52.8%	2.3%	926	3.2
Female	34.3%	61.3%	4.4%	954	3.2
AGE					
<35	35.4%	61.5%	3.1%	146	8.1
35-49	35.2%	59.8%	5.0%	359	5.2
50-64	37.9%	59.3%	2.8%	652	3.8
65+	52.9%	43.7%	3.4%	724	3.6
EDUCATION					
High school or less	47.5%	46.7%	5.8%	524	4.3
College or CEGEP	37.1%	60.2%	2.7%	619	3.9
University or higher	35.0%	63.6%	1.4%	715	3.7
COUNTRY OF BIRTH					
Not born in Canada	49.9%	45.8%	4.3%	328	5.4
Parents not born in Canada	40.6%	56.5%	2.9%	485	4.5
Both parents born in Canada	35.4%	61.2%	3.4%	1072	3.0
CURRENT VOTE INTENTION					
Liberal Party	23.7%	74.8%	1.5%	443	4.7
Conservative Party	83.8%	14.4%	1.8%	639	3.9
NDP	17.5%	82.3%	0.1%	332	5.4
Green Party	26.0%	73.6%	0.4%	130	8.6
Bloc Québécois	5.7%	94.3%	0.0%	33	17.1

Methodology:

This study was conducted using High Definition Interactive Voice Response (HD-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.

The field dates for this survey are April 22-28, 2015. In total, a random sample of 3,757 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-1.6 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 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.