

Post-Election Survey:

Insights from Voters

October 2021



EXOS

Methodology: IVR (i)

- » This report draws on data from **seven different surveys**
- » Five of these surveys were conducted by phone using Interactive Voice Response (IVR), where respondents are able to enter their preferences by punching the keypad on their phone, rather than telling them to a live operator
- » The field dates for the **first** survey are August 30-September 3, 2021
 - In total, a random sample of 2,008 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 2.2 percentage points, 19 times out of 20
- » The field dates for the **second** survey are September 1-7, 2021
 - In total, a random sample of 1,390 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 2.6 percentage points, 19 times out of 20

Methodology: IVR (ii)

- » The field dates for the **third** survey are September 8-14, 2021
 - In total, a random sample of 1,618 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 2.4 percentage points, 19 times out of 20
- » The field dates for the **fourth** survey are September 16-19, 2021
 - In total, a random sample of 1,662 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 2.4 percentage points, 19 times out of 20
- » The field dates for the **fifth** survey are September 27-October 5, 2021
 - In total, a random sample of 1,560 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 2.5 percentage points, 19 times out of 20
- » All the data have been statistically weighted by age, gender, and region

Methodology: CATI

- » In addition, one of the surveys covered in this report was conducted using computer-assisted telephone interviewing (CATI)
- » The field dates for this survey are August 30-September 3, 2021
 - In total, a random sample of 782 Canadian adults aged 18+ responded to the survey, yielding a margin of error of ± 3.5 percentage points, 19 times out of 20
- » All the data have been statistically weighted by age, gender, and region

Methodology: Probit

- » Lastly, this report draws on data from a survey conducted online using EKOS' probability-based research panel, *Probit*
- » The field dates for this survey are August 31-September 7, 2021
 - In total, 1,004 Canadians aged 18+ responded to the survey, yielding a margin of error of ± 3.1 percentage points, 19 times out of 20
- » All the data have been statistically weighted by age, gender, and region



- 1) **Overview of Election 44**
- 2) Performance of Our Polls
- 3) Key Forces Shaping the Election
- 4) Major Election Issues
- 5) *The People's Conservative Party*
- 6) Conclusions

Overview of Election 44 (i)

- » The public saw the election result coming and they did not like the outcome
 - Only 21% of Canadians were satisfied with the election result and, even among Liberal supporters, less than half were happy with the outcome
- » When asked how they would vote in another election the answer is basically the same
- » The public mood is pretty sour and trust in the federal government has declined significantly
 - Rising economic anxiety, a needless fourth wave of COVID-19 that seems to be continuing, and what was seen as a largely needless election are coalescing to produce a bad national mood

Overview of Election 44 (ii)

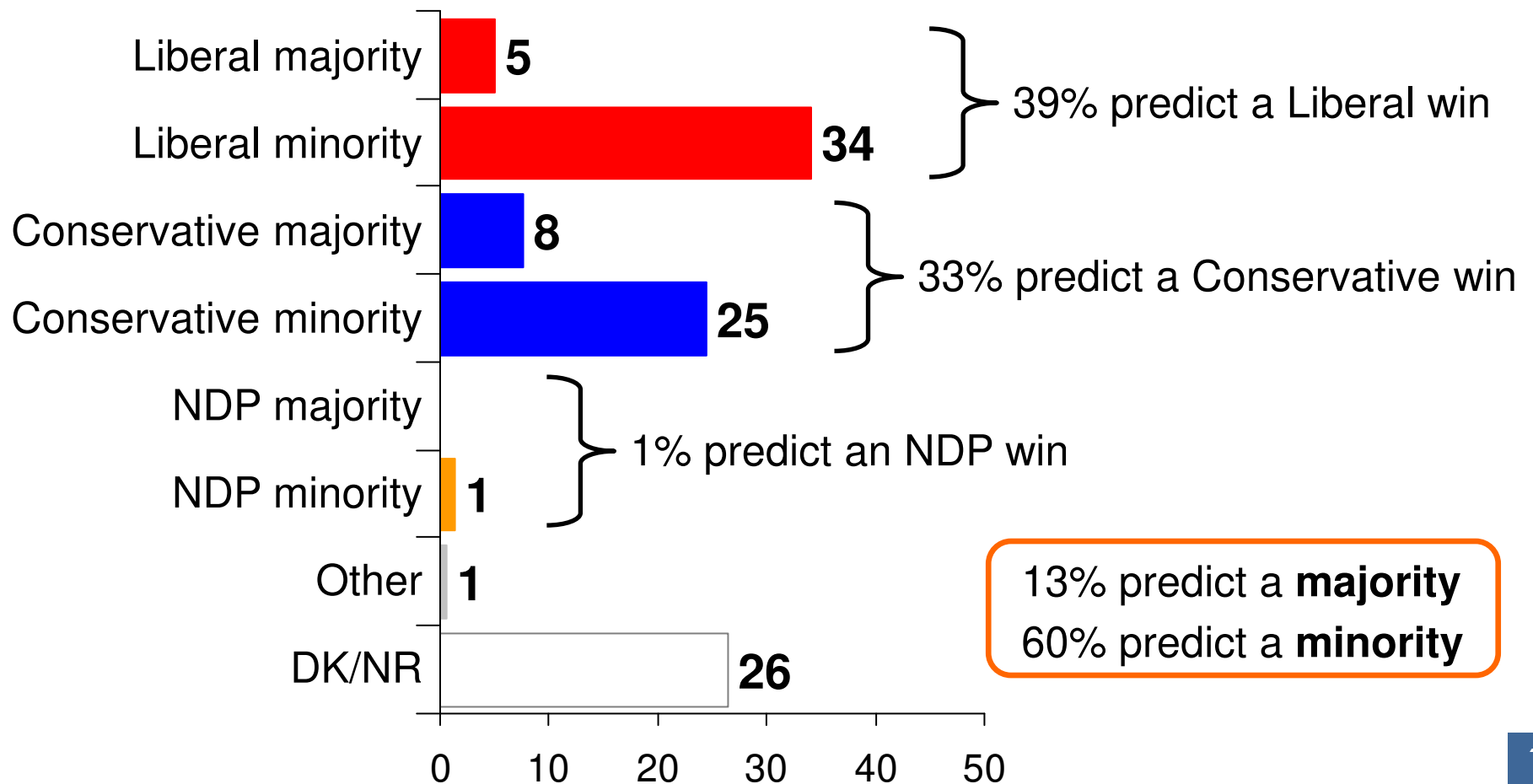
- » The campaign exhibited five central movements
- » **First**, the pre-campaign slide from a strong end of spring position for the Liberal Party to a virtual tie as the writ was dropped
 - Liberal fortunes declined as enthusiasm about vaccine roll out and the belief that the worst was over eroded in the face of the fourth wave
- » **Second**, the Conservatives launched a newly moderate leader and platform which produced initial favour with an electorate that were bemused with why the Liberals had called an election
 - The Conservative moved into a commanding position

Overview of Election 44 (iii)

- » **Third**, the post-Labour Day focus on apparent twists in the Conservative position on guns and a vaccine narrative that failed to impress their new recruits from the political centre
 - Meanwhile the newly moderate positions of Erin O'Toole were inflating the fortunes of the People's Party whose supporters saw the "centrificalion" of the Conservative Party as anathema
- » **Fourth**, the final stages of the campaign saw the Bloc Québécois' flagging fortunes kickstarted by the National Debate
- » **Fifth**, some of the People's Party's vote either stayed home or returned to the Conservative fold over fears of a Trudeau victory and little prospect of any seat breakthroughs causing low turnout

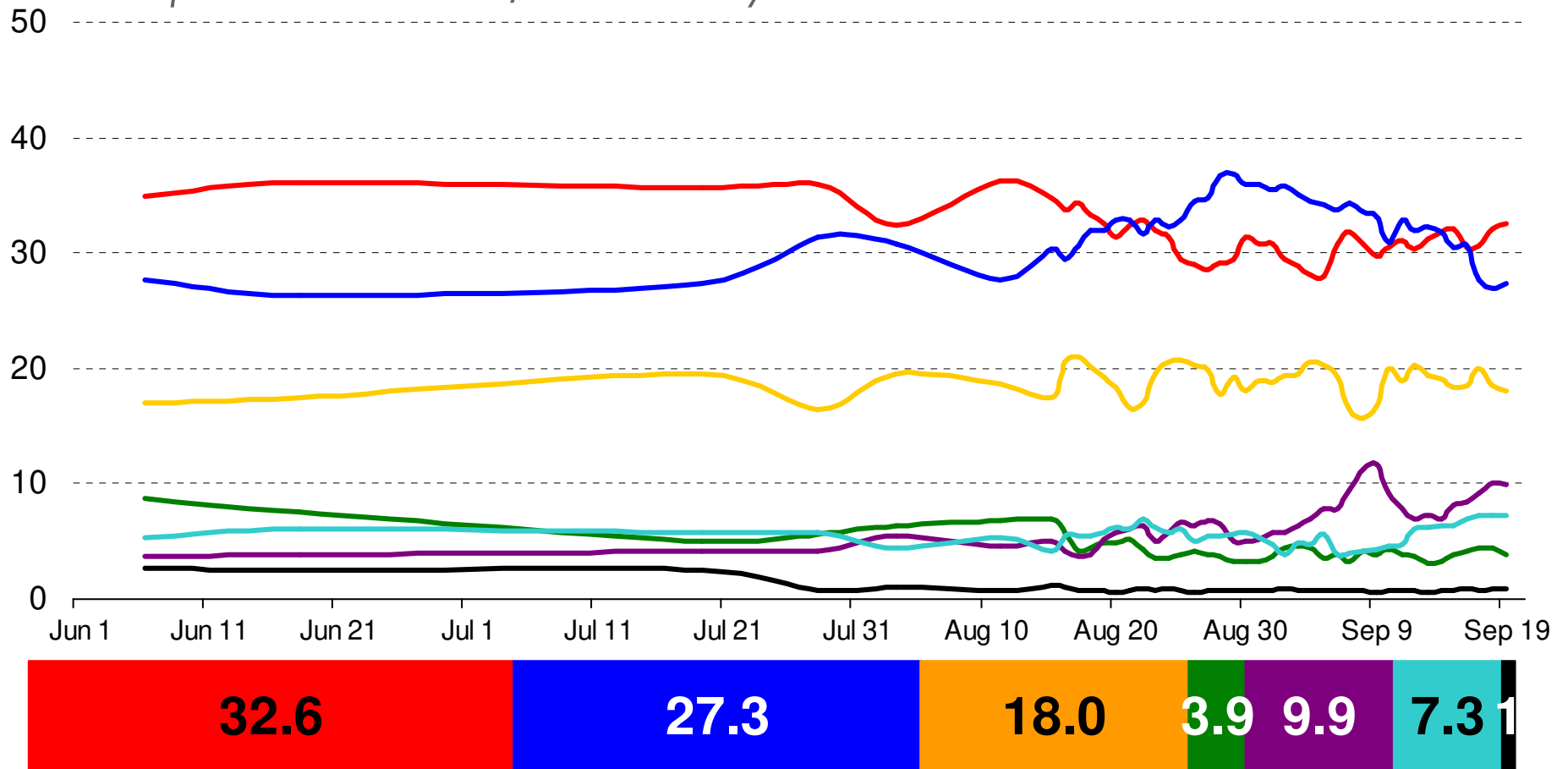
Predicted election outcome

Q. *Regardless of your current choice, who do you think will win the next election? And do you think this will be a minority or a majority government?*



Tracking federal vote intention

Q. How do you plan to vote in the upcoming federal election on September 20th? / How did you vote in this election?



— LPC — CPC — NDP — GP — PPC — BQ — Other

Note: These figures are based on decided and leaning voters only; 9.7% of respondents say they are undecided or skipped the question.

BASE: Canadians; September 16-19, 2021, n=1,662, MOE +/- 2.4%, 19 times out of 20

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Satisfaction with election results

Q. Overall, how satisfied are you with the results to this election?

2021 election



BASE: Canadians; September 27-October 5, 2021, n=1,560, MOE +/- 2.5%, 19 times out of 20

2019 election



BASE: Canadians; October 22-30, 2019, n=1,944, MOE +/- 2.2%, 19 times out of 20

2015 election



BASE: Canadians; October 20-23, 2015, n=1,973, MOE +/- 2.2%, 19 times out of 20

2011 election

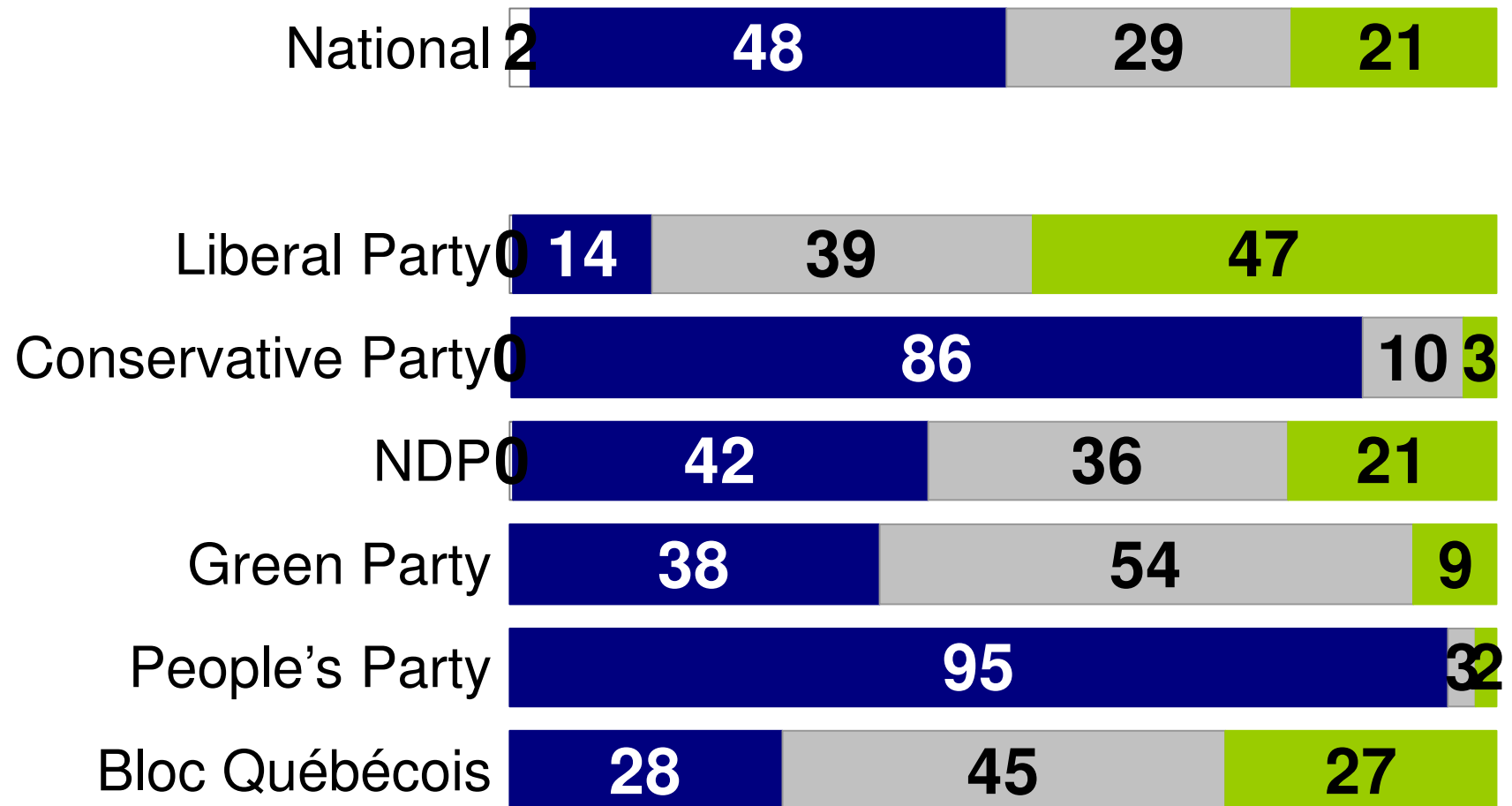


BASE: Canadians; May 20-28, 2011, n=2,203, MOE +/- 2.1%, 19 times out of 20

DK/NR Dissatisfied (1-2) Neither (3) Satisfied (4-5) 12

Satisfaction by party support

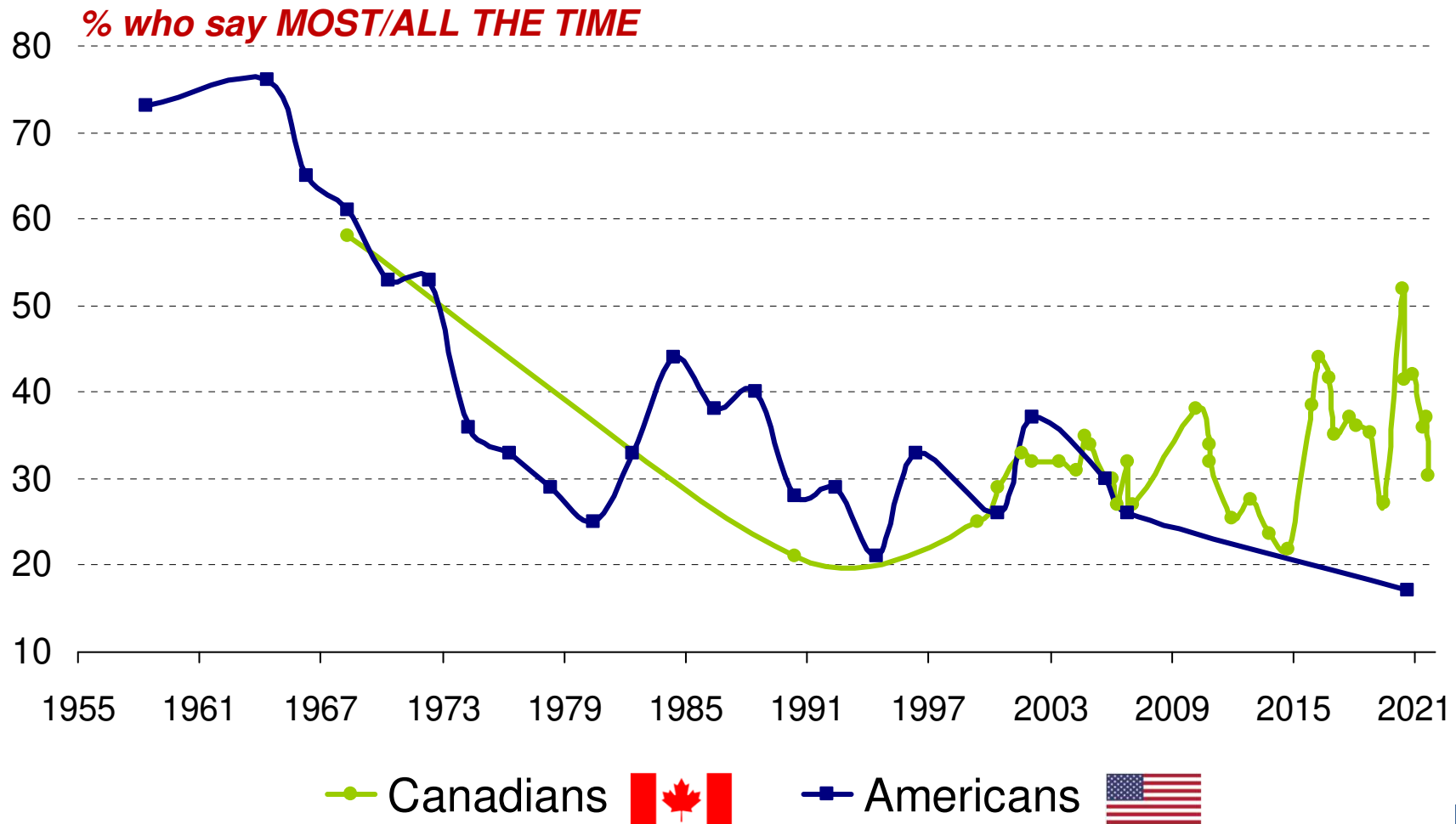
Q. Overall, how satisfied are you with the results to this election?



DK/NR
 Dissatisfied (1-2)
 Neither (3)
 Satisfied (4-5)

Tracking trust in government

Q. How much do you trust the federal government in Ottawa/Washington to do what is right?



BASE (U.S.): Americans; August 7-16, 2020, n=710, MOE +/- 3.7%, 19 times out of 20

BASE: Canadians; August 31- September 7, 2021, n=1,004, MOE +/- 3.1%, 19 times out of 20



- 1) Overview of Election 44
- 2) **Performance of Our Polls**
- 3) Key Forces Shaping the Election
- 4) Major Election Issues
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Performance of our polls

- » Overall, our polling clearly predicted the election and it was very close to the actual vote outcome with the notable exception of the Conservative Party and the People's Party, which were under- and overestimated, respectively, by offsetting amounts
- » As we will see later on, the boundaries between the two parties are very fluid and many of those voters are very similar in terms of demographics and psychographics

EKOS' final seat forecast

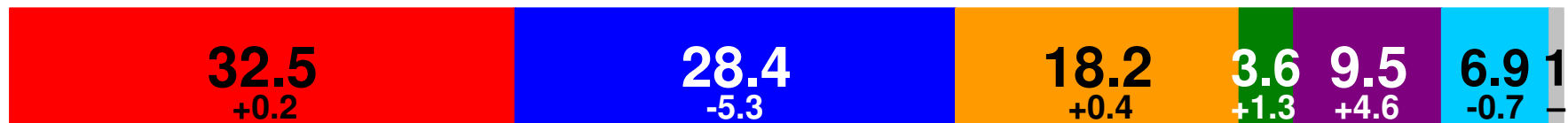
	LPC	CPC	NDP	BQ	GP	PPC	IND
Final projection:	164	113	27	31	3	0	0
Sep. 20 results:	160	119	25	32	2	0	0

EKOS vs. the election results

Q. How do you plan to vote in the upcoming federal election on September 20th? / How did you vote in this election?

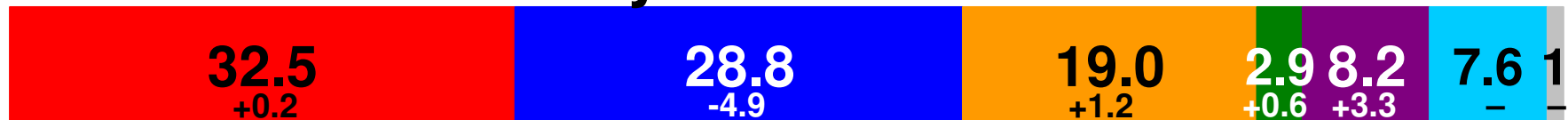
EKOS' final poll

(Difference from election results below)



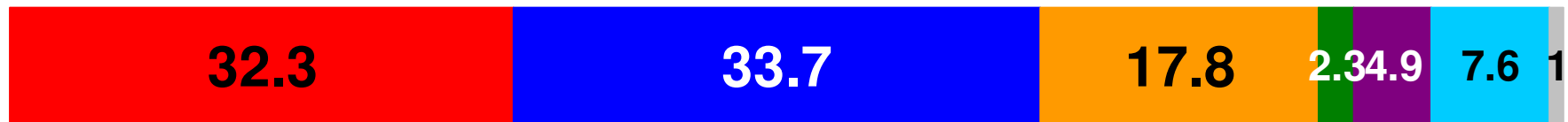
BASE: Decided voters; September 16-19, 2021, n=1,662, MOE +/- 2.4%, 19 times out of 20

Post-election survey



BASE: Voted on Sep. 20; Sep. 27-Oct. 5, 2021, n=1,290, MOE +/- 2.7%, 19 times out of 20

2021 election results



■ LPC
 ■ CPC
 ■ NDP
 ■ GP
 ■ BQ
 ■ PPC
 ■ Other

Final results with CPC/PPC combined

Q. How do you plan to vote in the upcoming federal election on September 20th? / How did you vote in this election?

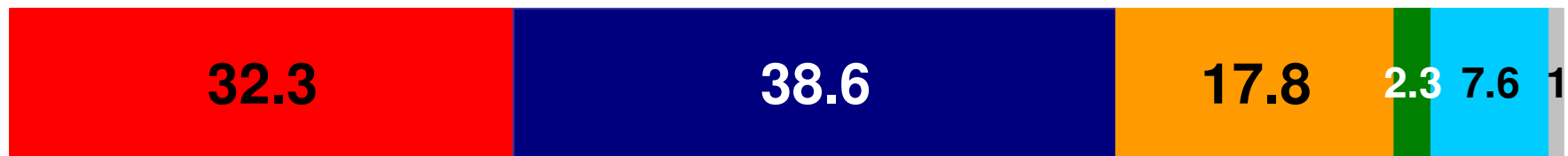
EKOS' final prediction

(Difference from election results below)



BASE: September 16-19, 2021, n=1,662, MOE +/- 2.4%, 19 times out of 20

2021 Election Results



■ LPC
 ■ CPC/PPC
 ■ NDP
 ■ GP
 ■ BQ
 ■ Other

Mode effects

- » During the campaign, we ran an experiment to measure the mode effects of using IVR versus live interviewers
 - Both surveys used the same sampling techniques and virtually identical questionnaires
- » Overall, the two surveys produced very similar results; however, we found that IVR does a better job of picking up those who are institutionally mistrustful and less willing to disclose their vote intention to a live interviewer
 - Somewhat ironically, this broader coverage of the Canadian population made our final poll less accurate, as these individuals were less likely to vote
- » We have seen a similar pattern in the United States where the institutionally mistrustful are less likely to participate in some survey modes*
 - The key difference is that those voters showed up on Election Day

*For further reading:

1. American Association for Public Opinion Research, “2020 Pre-Election Polling: An Evaluation of the 2020 General Election Polls”, 2021. Available online at: <https://bit.ly/3pn5CaW>
2. Frank Graves, “Ordered Populism and Implications for the 2020 Presidential Election”, Presentation to ESOMAR, August 20, 2020. Available online at: <https://bit.ly/2ZeTPRp>

Mode effects

Q. How do you plan to vote in the upcoming federal election on September 20th? / How did you vote in this election?

IVR

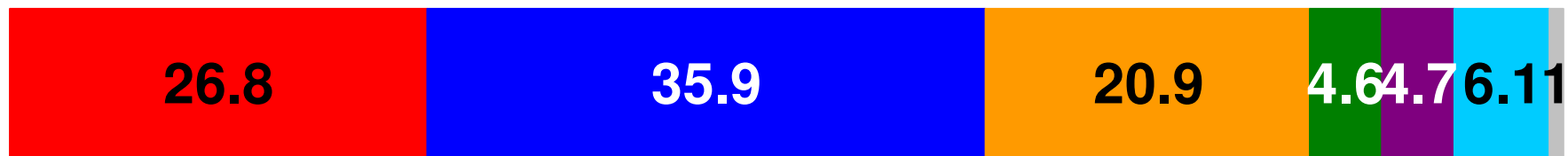
August 30-September 3, 2021



BASE: Canadians; August 30-September 3, 2021, n=2,008, MOE +/- 2.2%, 19 times out of 20

Live interviewer

August 30-September 3, 2021



BASE: Canadians; August 30-September 3, 2021, n=782, MOE +/- 3.5%, 19 times out of 20

■ LPC ■ CPC ■ NDP ■ GP ■ PPC ■ BQ ■ Other



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Key forces shaping the election (i)

- » What is perhaps most the most interesting feature of the campaign is how dynamic the electorate were over the course of the campaign
 - What appeared to be a relatively placid voter landscape was actually producing all sorts of movements
- » The initial tie as the writ was dropped quickly shifted to a clear Conservative lead
 - These early gains were largely based on Liberal losses (which, in turn, were partly offset by Liberal gains from the NDP)
 - The Liberal defectors were more concerned about fiscal and economic issues and also had a negative outlook on Justin Trudeau
 - Meanwhile, as Erin O'Toole pivoted to the center this reinforced his gains

Key forces shaping the election (ii)

- » Less obviously, the Conservative Party was losing significant numbers of voters to the People's Party
 - On one hand, this shift made O'Toole more appealing to some moderate Conservative voters and erstwhile Liberal voters
 - On the other, the further right Conservatives detested this move to the centre and that was what fueled the growth of the People's Party
 - Indeed, 60% of those who ultimately voted for the People's Party say they were less likely to vote Conservative as a result of his new centrist stance

Key forces shaping the election (iii)

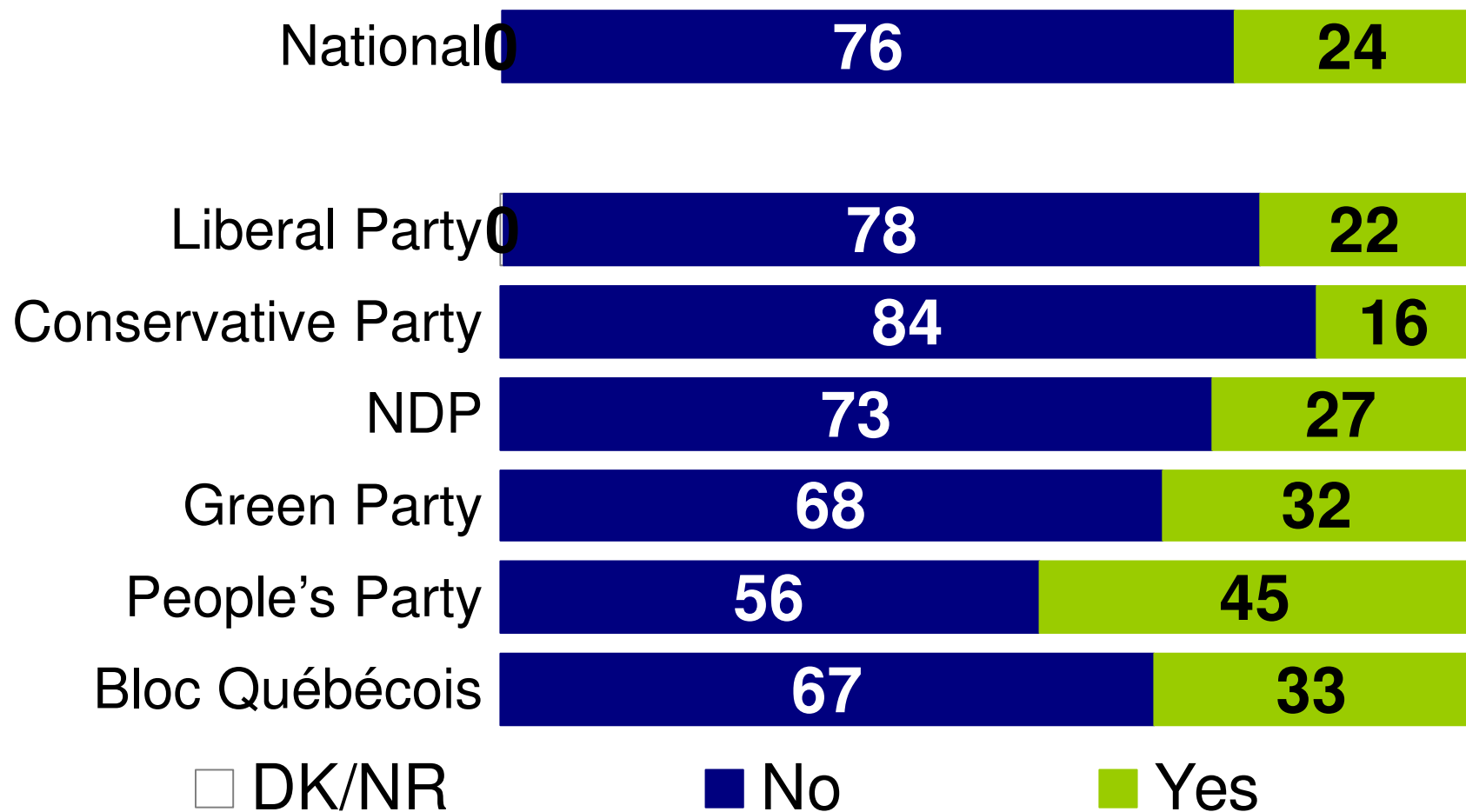
- » However, the People's Party suffered lower turnout and a late shift to the Conservatives which the poll shows was clearly motivated by desire to not see Trudeau elected
 - Just 4% of People's Party voters made up their minds on Election Day (compared to 9% nationally), suggesting the party was (relatively) losing support at that point
 - Among those who switched the Conservative Party, nearly half (46%) say they did so to stop another candidate from winning
- » Meanwhile, many of the “blue” Liberals who had defected to the Conservatives returned to the Liberal Party as concerns about guns and vaccines damaged the authenticity of O'Toole 2.0 as a reprise of Bill Davis

Key forces shaping the election (iv)

- » The most interesting finding in Quebec is the clear evidence that almost half of Bloc Québécois voters made their choice in the period following the National Debate
 - Prior to the debates, Blanchette was in decline debate struck a chord with nationalist voters in Quebec and clearly galvanized his weakening support

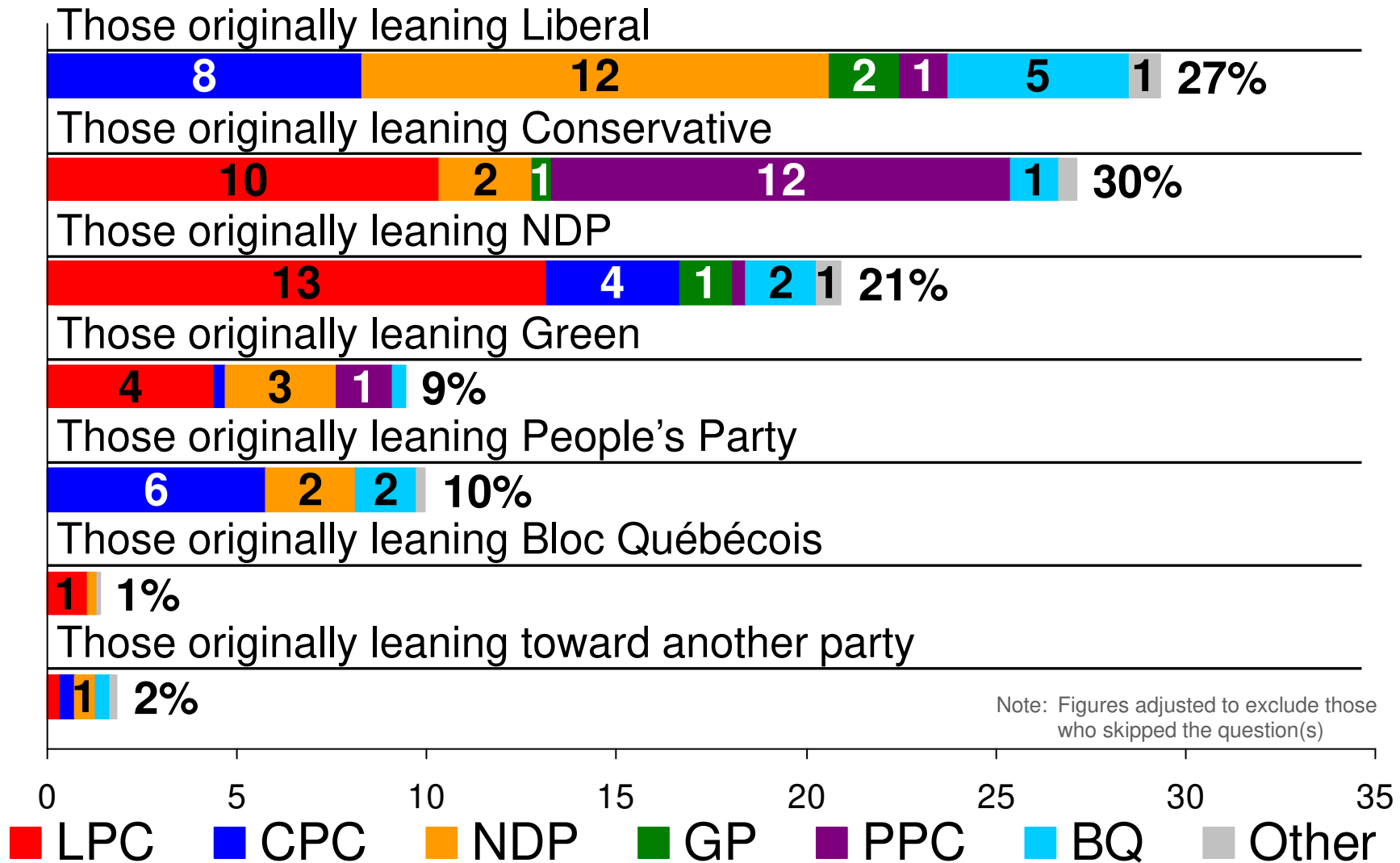
Incidence of changing mind

Q. *Were you originally leaning towards voting for a different party at the beginning of the election campaign?*



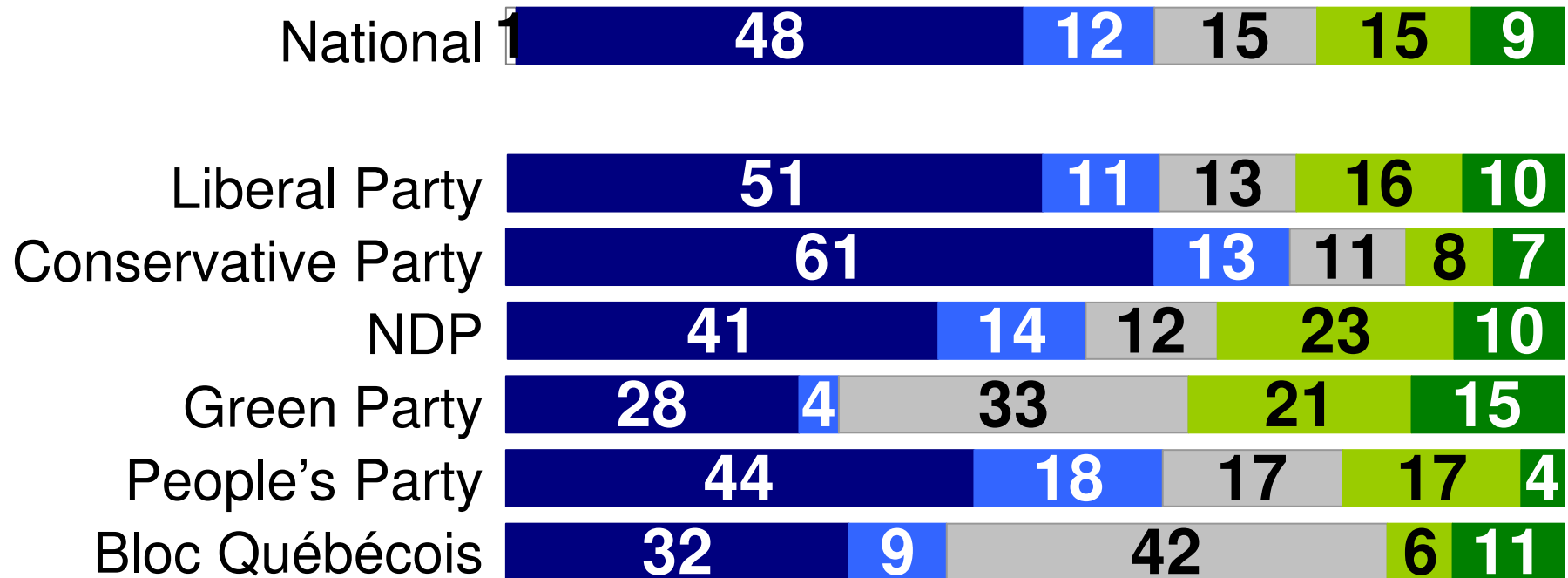
Destination of defectors

Q. Which party did you vote for in this election?



Sequencing by party support

Q. When did you make your final decision regarding how you were going to vote?



- DK/NR
- Before the election campaign
- Before the leaders' debate
- After the leaders' debate
- In the last week of the election campaign
- On Election Day or at the ballot booth

Sequential anatomy of party support

Q. How did you vote in this election?

Before the election campaign



Before the leader's debates



After the leader's debates



In the last week of the election campaign



On Election Day or at the ballot booth



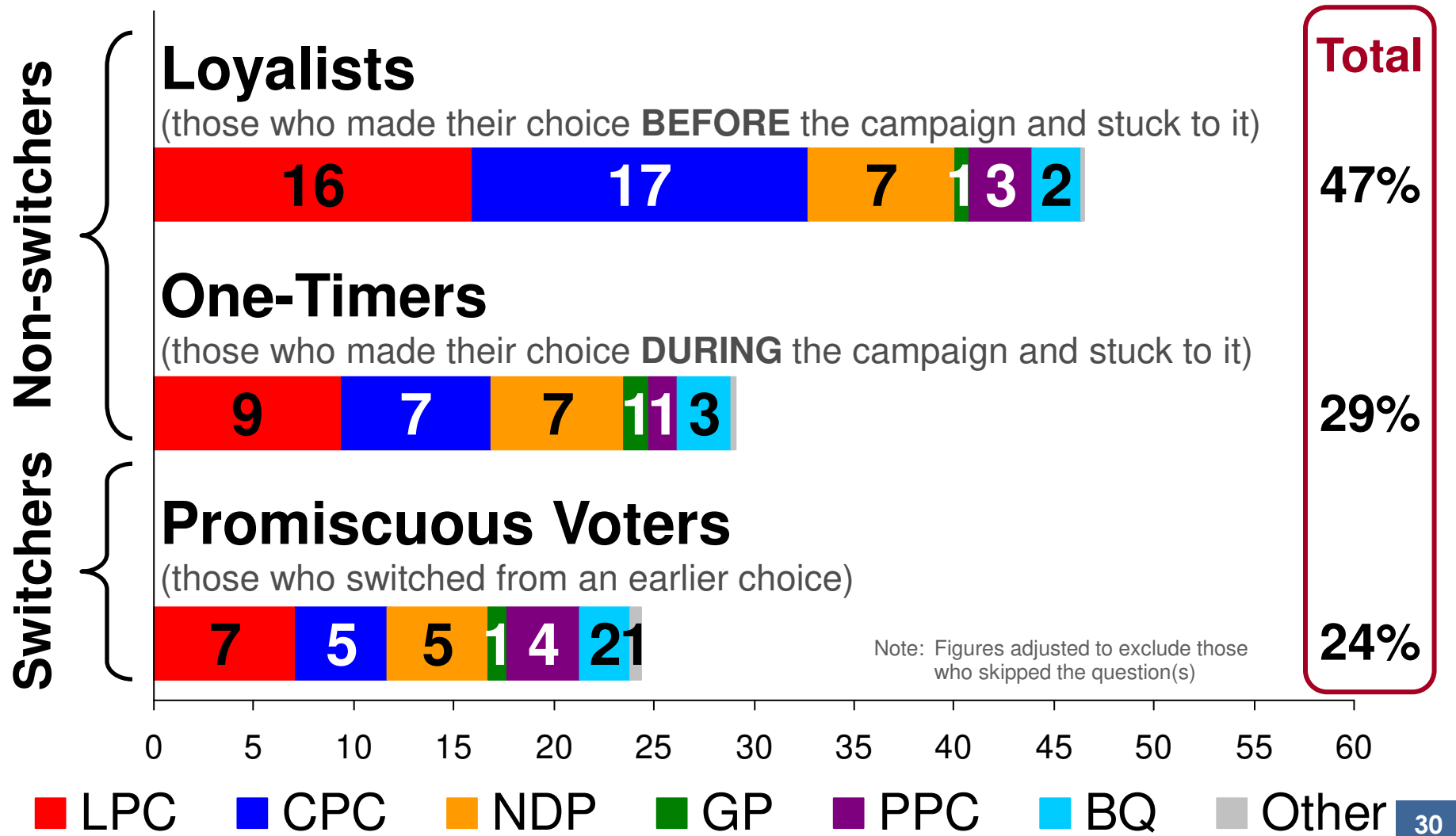
Note: Figures adjusted to exclude those who skipped the question(s)

0 5 10 15 20 25 30 35 40 45 50 55 60

■ LPC
 ■ CPC
 ■ NDP
 ■ GP
 ■ PPC
 ■ BQ
 ■ Other

Three-way division of voters

Q. How did you vote in this election?

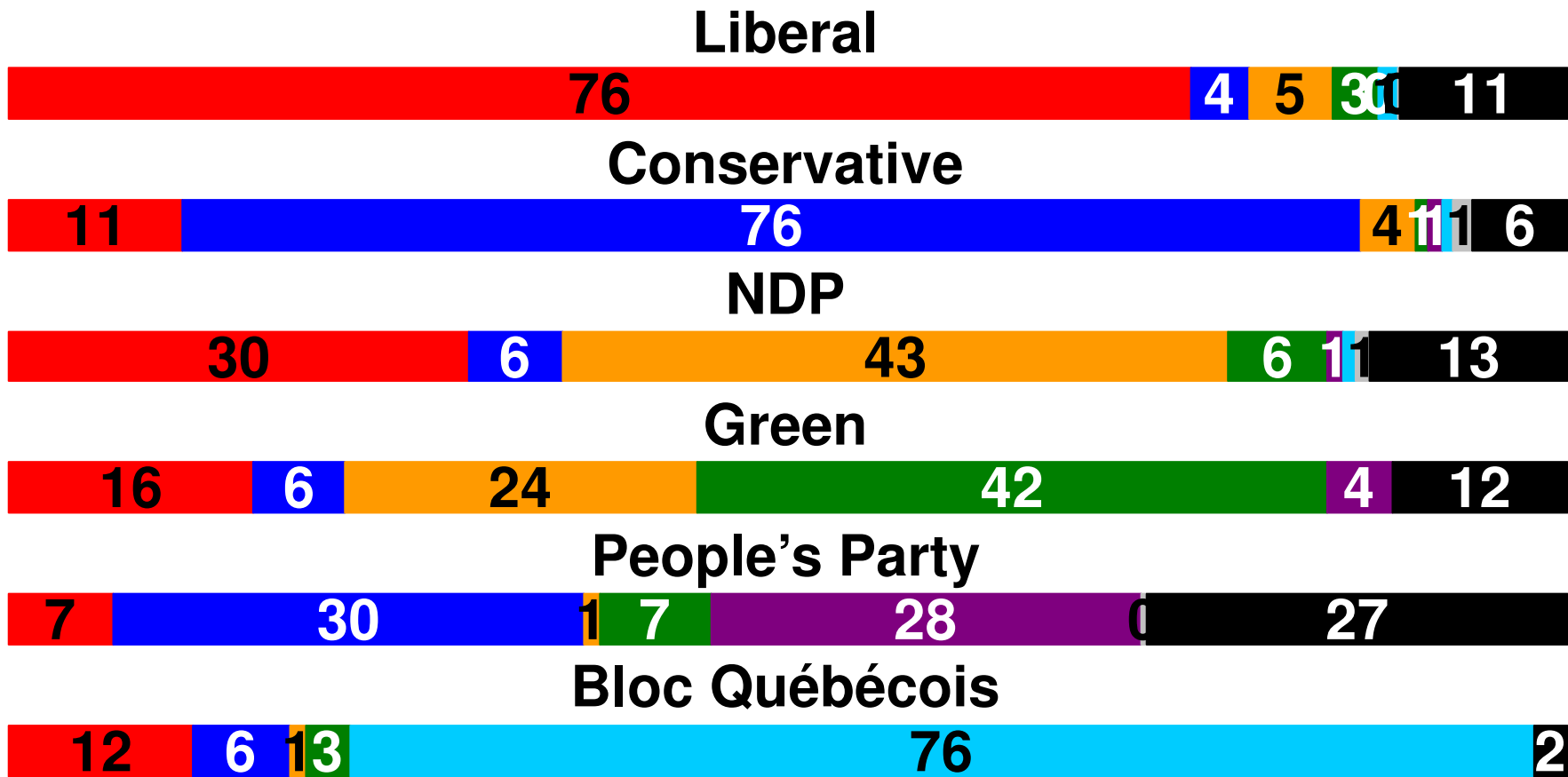


BASE: Those who voted on Sep. 20; Sep. 27-Oct. 5, 2021, n=1,290, MOE +/- 2.7%, 19 times out of 20

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Composition of current party support

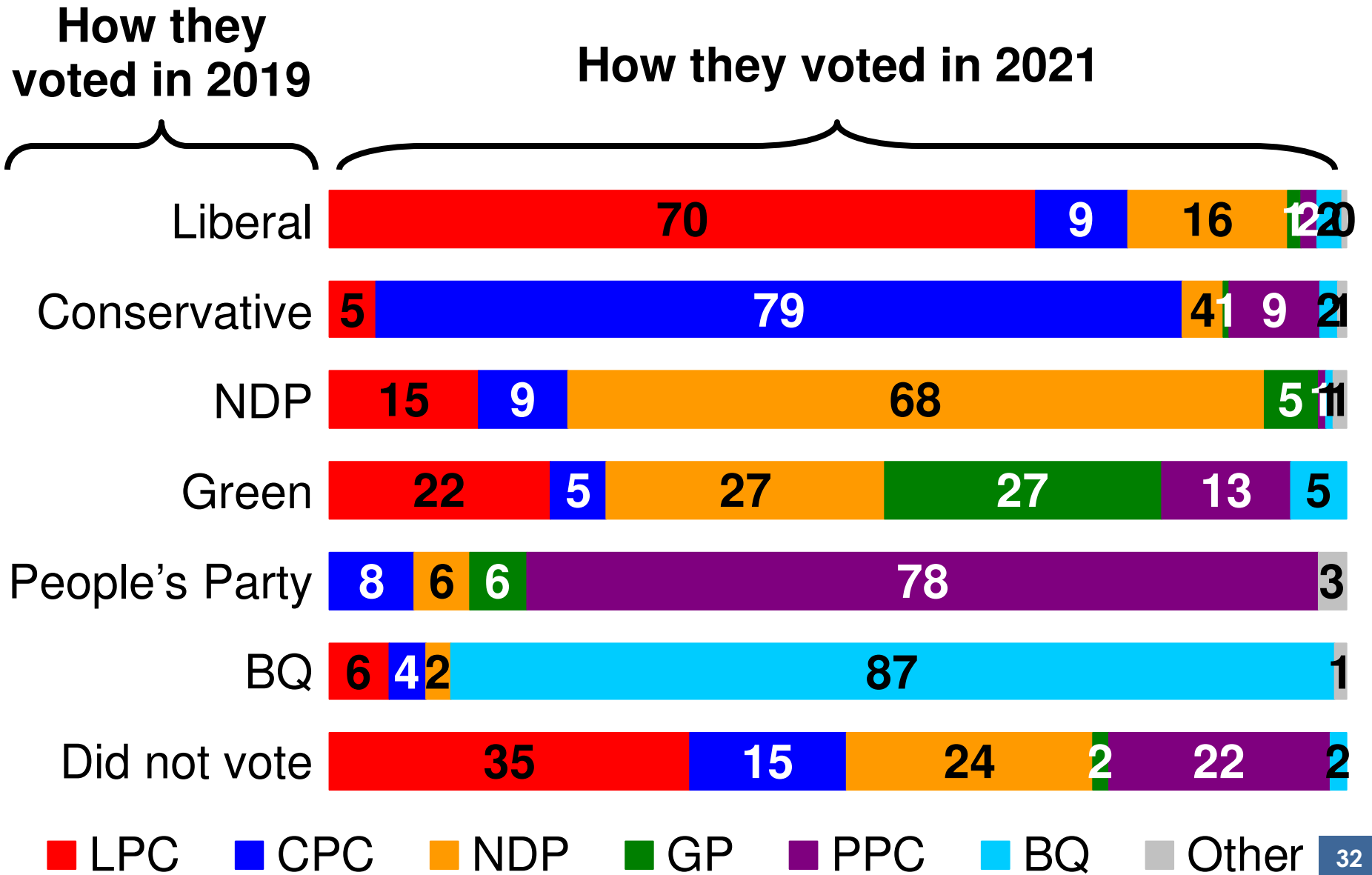
Q. How did you vote in the 2019 federal election?



2019 Vote

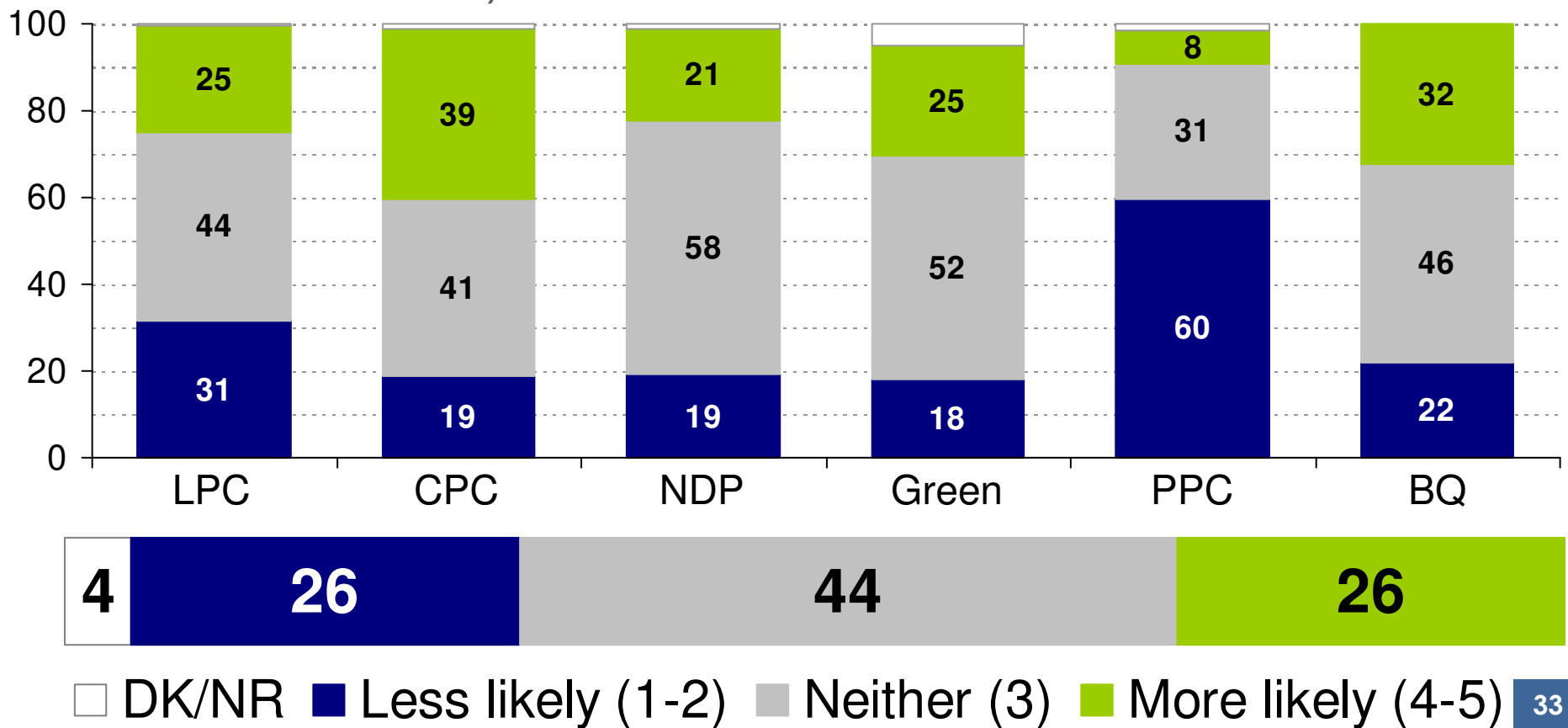
■ LPC
 ■ CPC
 ■ NDP
 ■ GP
 ■ PPC
 ■ BQ
 ■ Other
 ■ Did not vote/Skip

Voter mobility



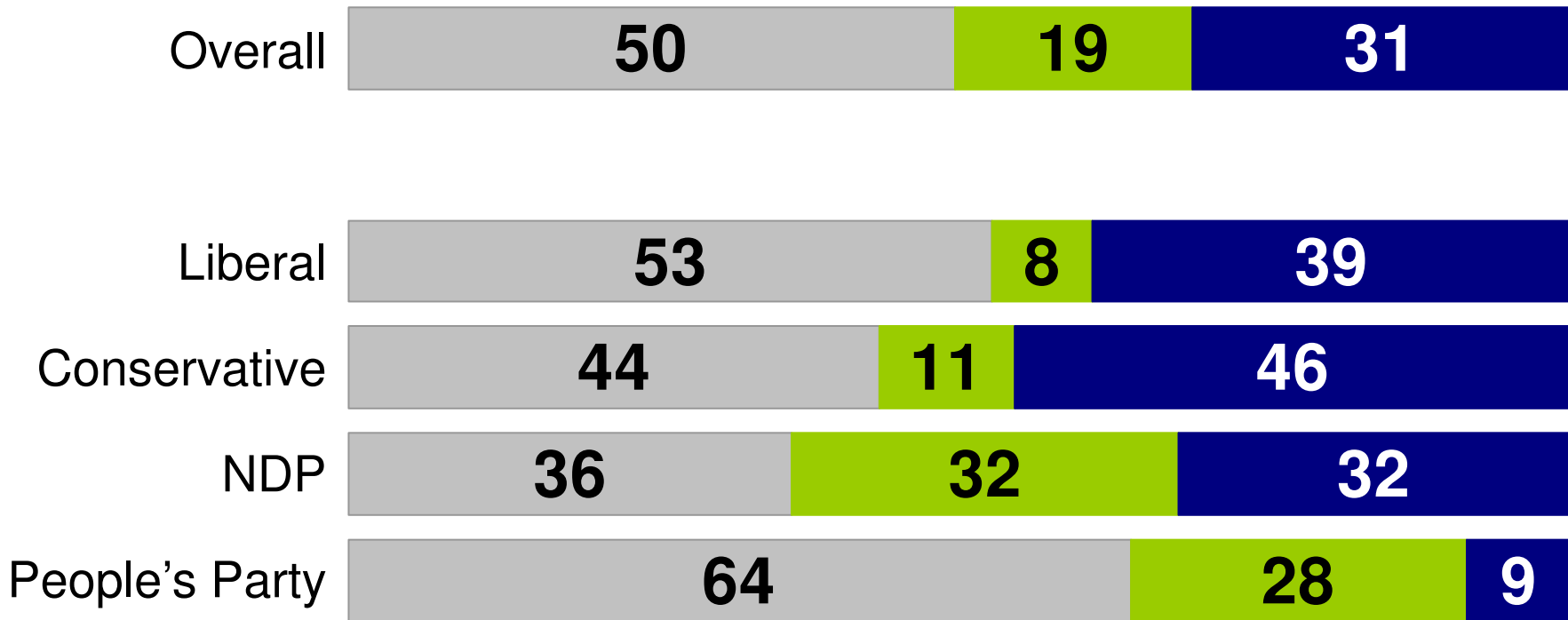
Impact of O'Toole's centrist approach

Q. Many observers argue that, compared to past leaders of the Conservative Party, Erin O'Toole is more socially progressive on issues such as climate change, government spending, and abortion rights. Did this more centrist approach make you more or less likely to vote Conservative?



Impact of O'Toole's centrist approach

Q. [THOSE WHO SWITCHED PARTIES] What was the main reason you changed your mind?



■ Another reason

■ I preferred the new party or candidate

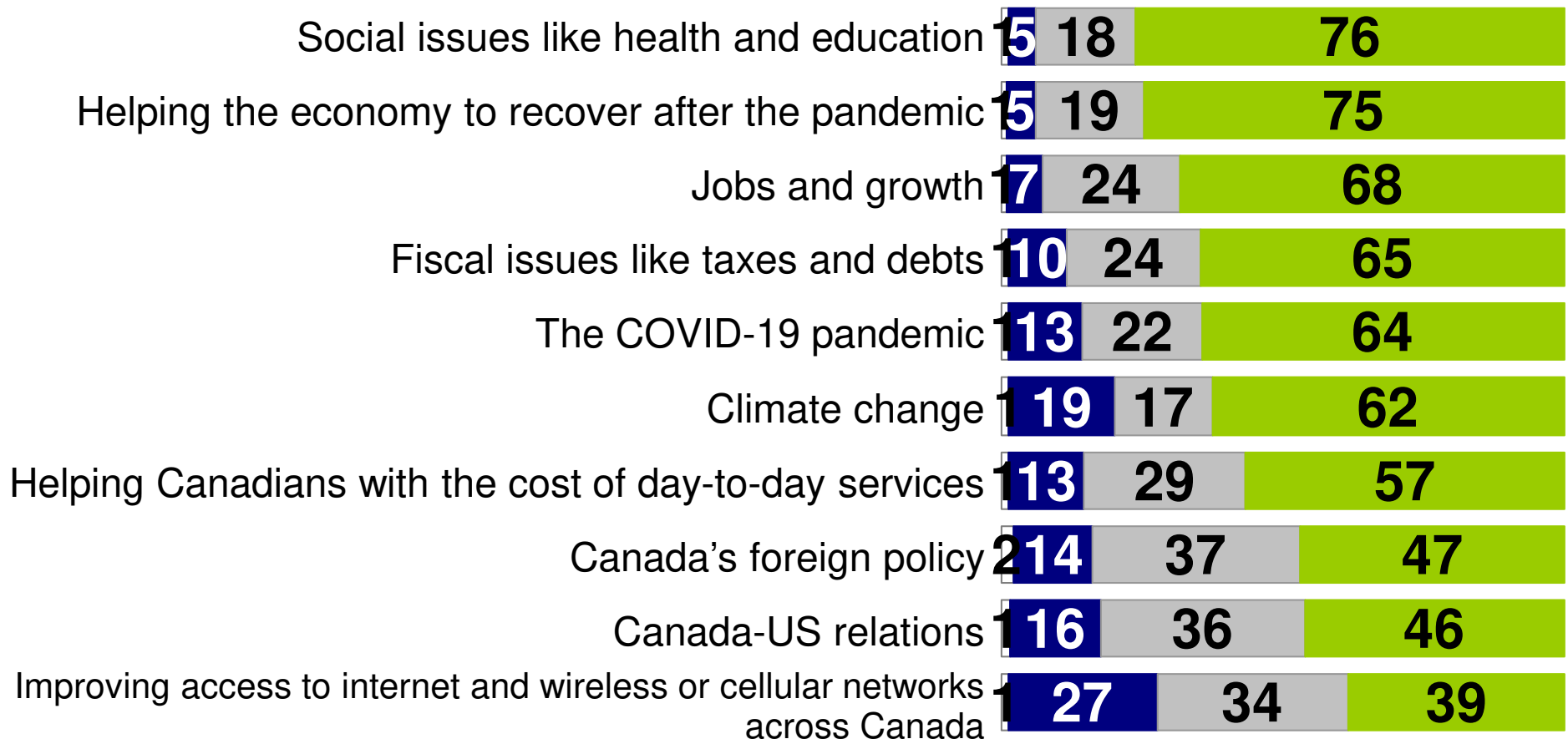
■ I was trying to prevent another party from winning



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Most important election issue

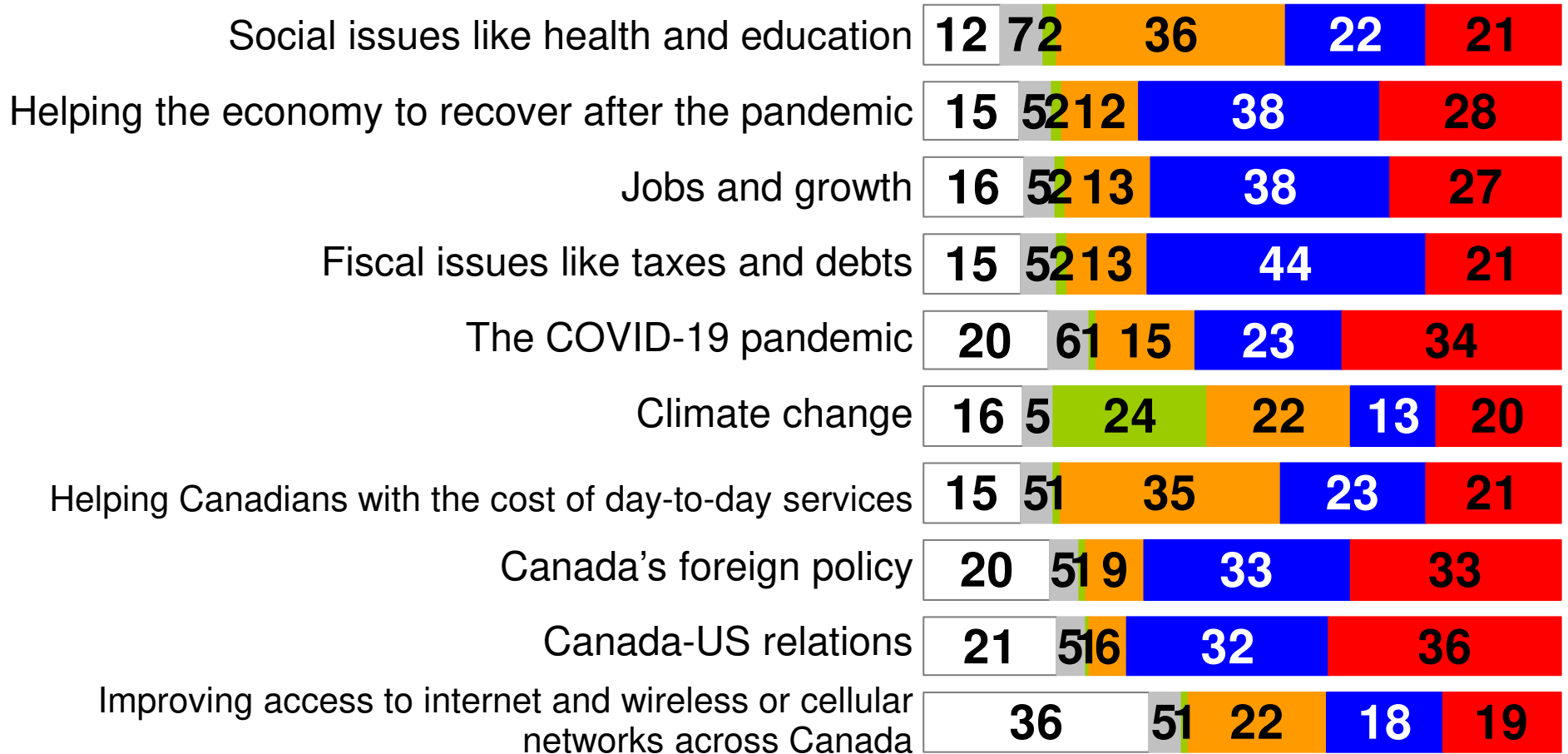
Q. How important are each of the following issues when it comes to deciding which party you will vote for in this upcoming election?



DK/NR
 Not very (1-2)
 Somewhat (3)
 Very (4-5)

Party most trusted to deal with key issues

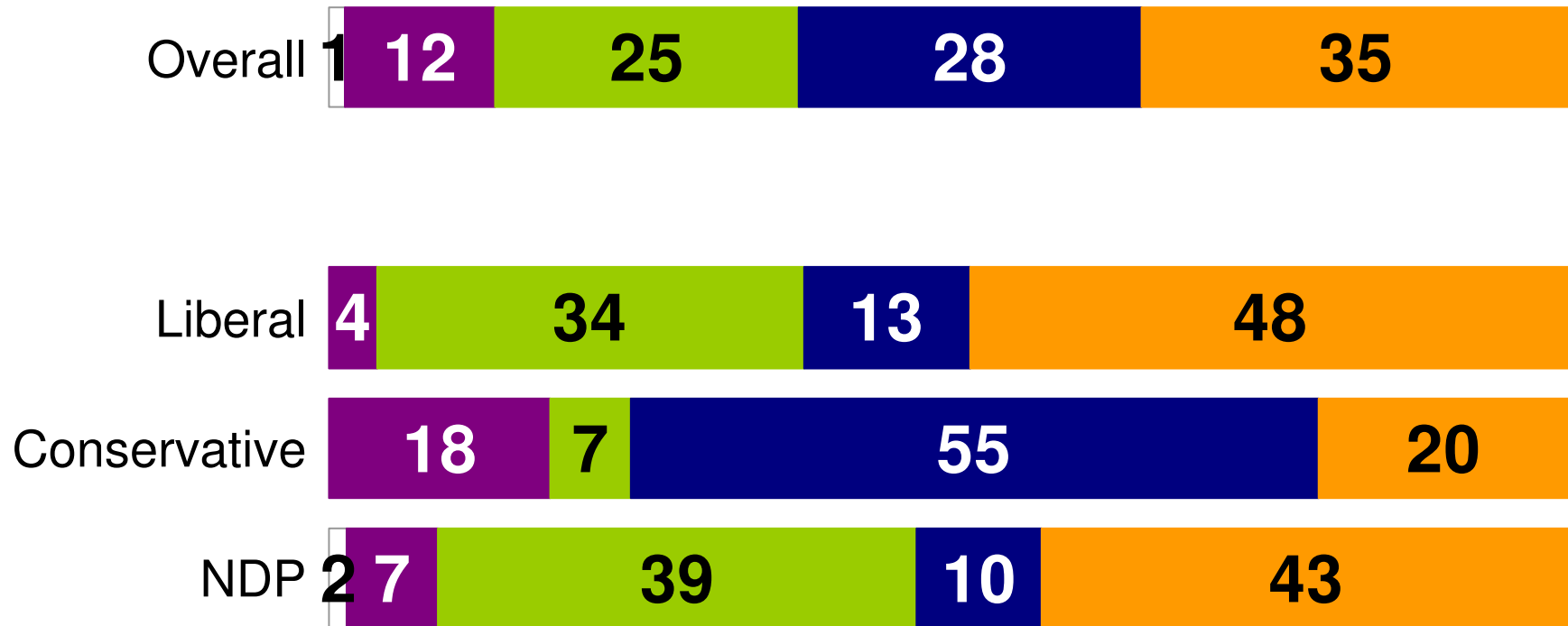
Q. Which party do you trust most to deal with each of the following issues?



DK/NR
 Other
 GP
 NDP
 CPC
 LPC

Most important election issue

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



DK/NR

Issues like ethics and accountability

Issues related to the environment and climate change

Fiscal issues like taxes and debt

Social issues like health and education



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The People's Conservative Party (i)

- » An analysis of People's Party supporters reveals similar characteristics to the populist voters who supported Trump in the United States and Brexit in the United Kingdom (with some interesting differences)
- » Roughly half of the Conservative constituency looks more like the People's Party than the more moderate Conservative Party that O'Toole tried to present to voters
- » Our polling methods seem to do a better job of reaching the institutionally mistrustful
 - Unlike in the U.S. election where this produced a systematic underestimate of Trump support, it seemed to cause a reverse error here
- » We suspect that despite very high “enthusiasm,” the prospect of no real representation in our first-past-the-post system dampened turnout for the People's Party

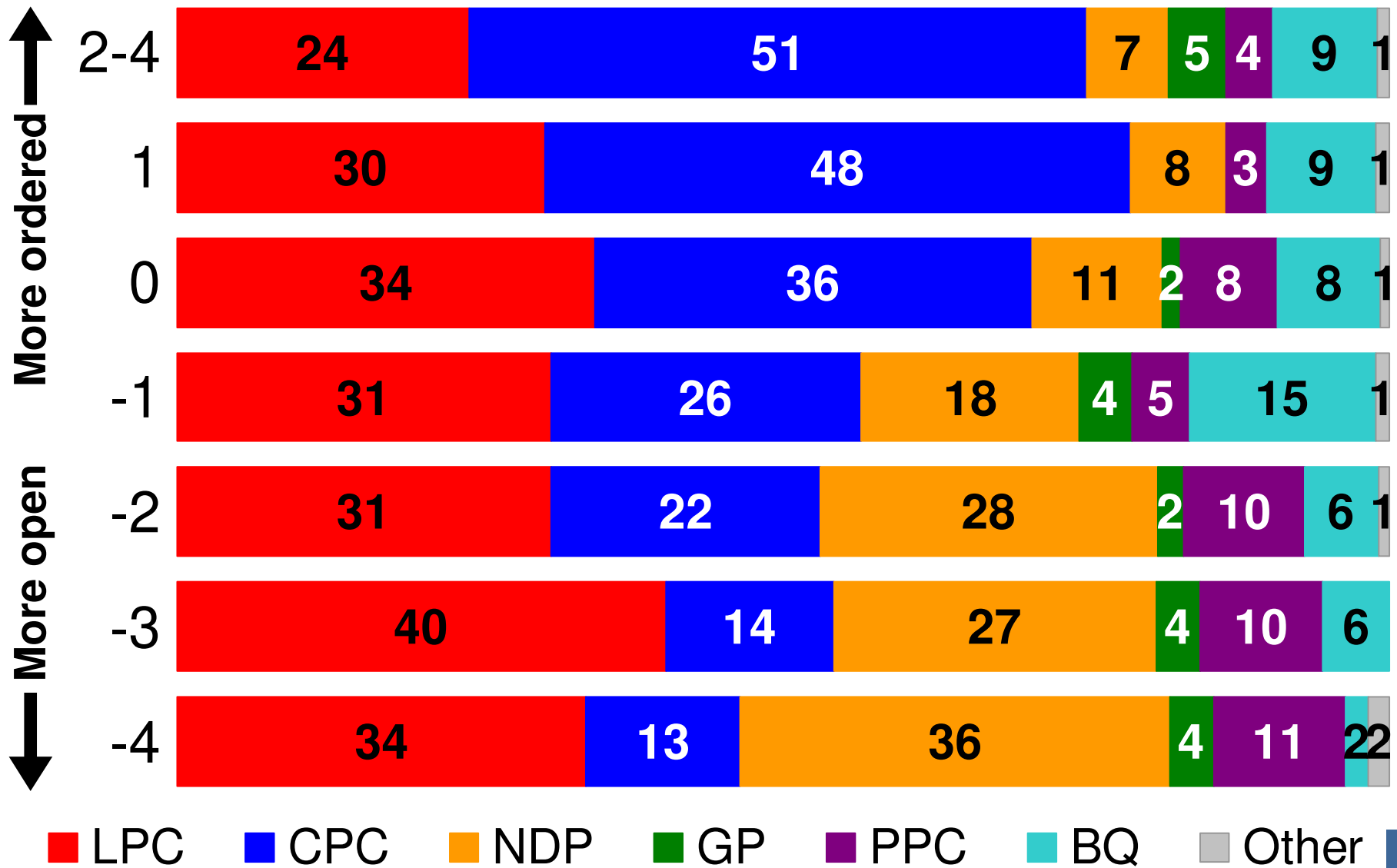
The People's Conservative Party (ii)

- » Conservative Party and People's Party supporters share far more similarities than differences
 - Each party's supporters have the other party as their lead second choice
 - Nearly identical proportions of Conservative and People's Party voters (69% and 67%, respectively) identify as small-c conservatives and they both share an ordered outlook
 - Interestingly, one thing that differentiates Conservatives from People's Party voters is that the latter are overwhelmingly more likely to emphasize questioning authority, while Conservatives prioritize are more likely to say they want to instill trust in experts
 - The data also show that vaccine passports receive much lower support from Conservatives and virtually no support from People's Party voters

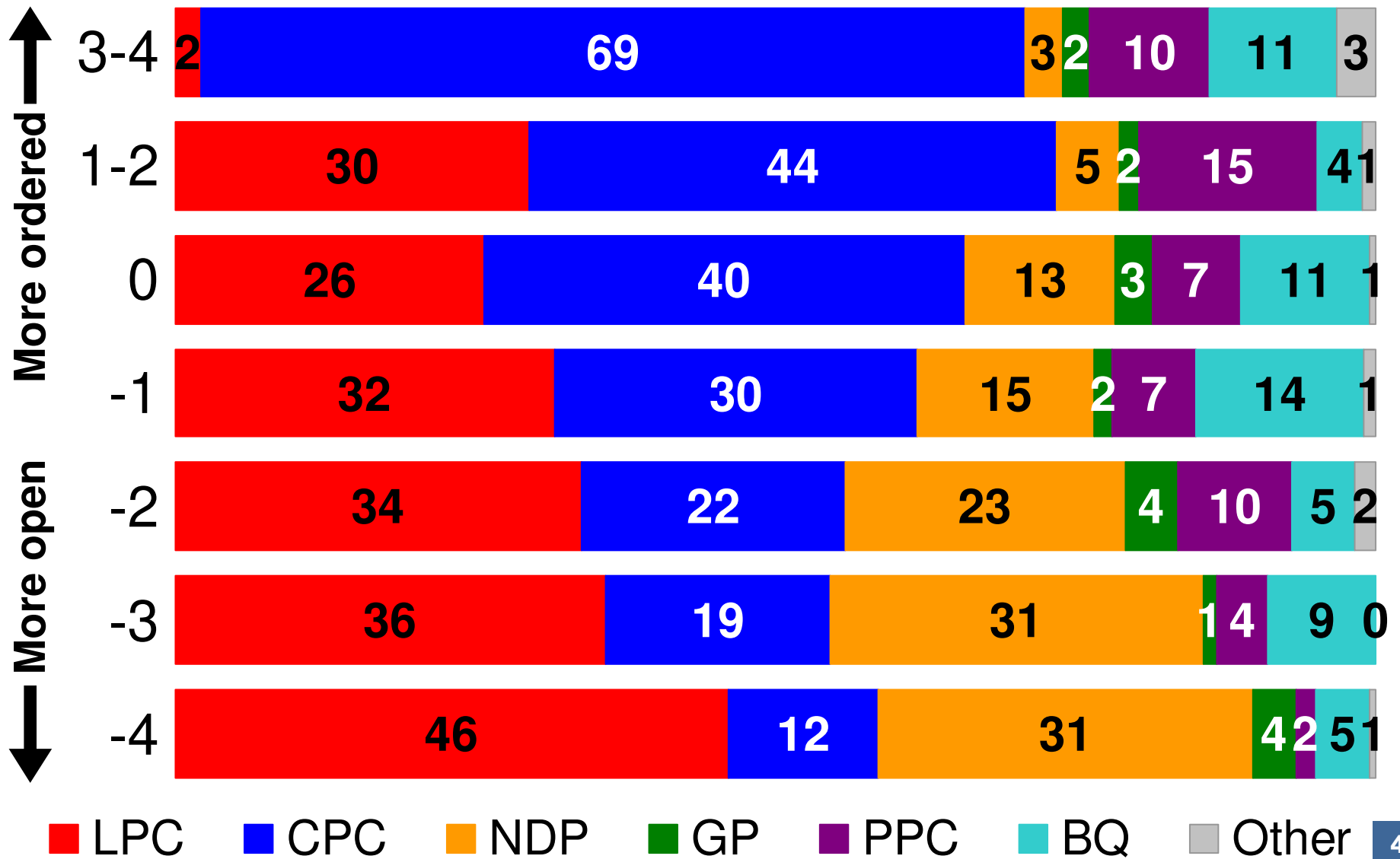
The People's Conservative Party (iii)

- » We also find evidence that there was some late switching to the Conservative Party and in response to the late appeal that a vote for People's Party would ultimately be a vote for the Liberals
 - However, it appears that the Liberal Party's outreach and ground game was considerably more effective than any of the other parties, with 38% of those who switched to the Liberals reporting they'd been contacted by the party
 - We also find evidence that many People's Party supporters simply stayed home
- » At the end of the day, these factors overwhelmed the enthusiasm advantage, but the Conservative voter is intensely disappointed with the election and with the attempt to pivot the Conservative Party to the centre

Open-ordered index (old 4-factor index)



Open-ordered index (new 4-factor index)

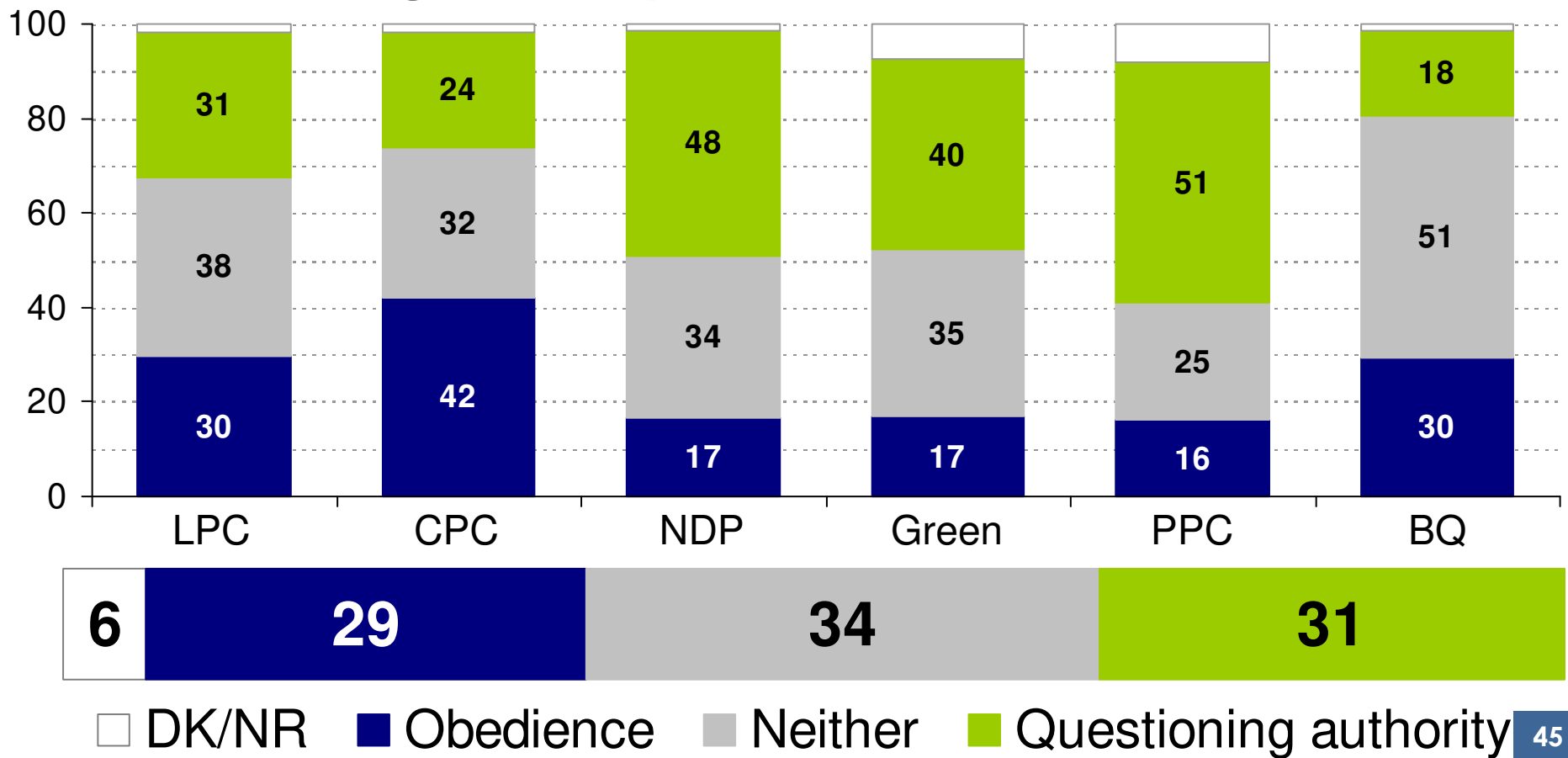


Open-ordered index

Obedience vs. questioning authority

Q. When raising children, which of the following do you think is more important to emphasize?

Questioning authority or obedience?



BASE: Canadians; September 27-October 5, 2021, n=1,560, MOE +/- 2.5%, 19 times out of 20

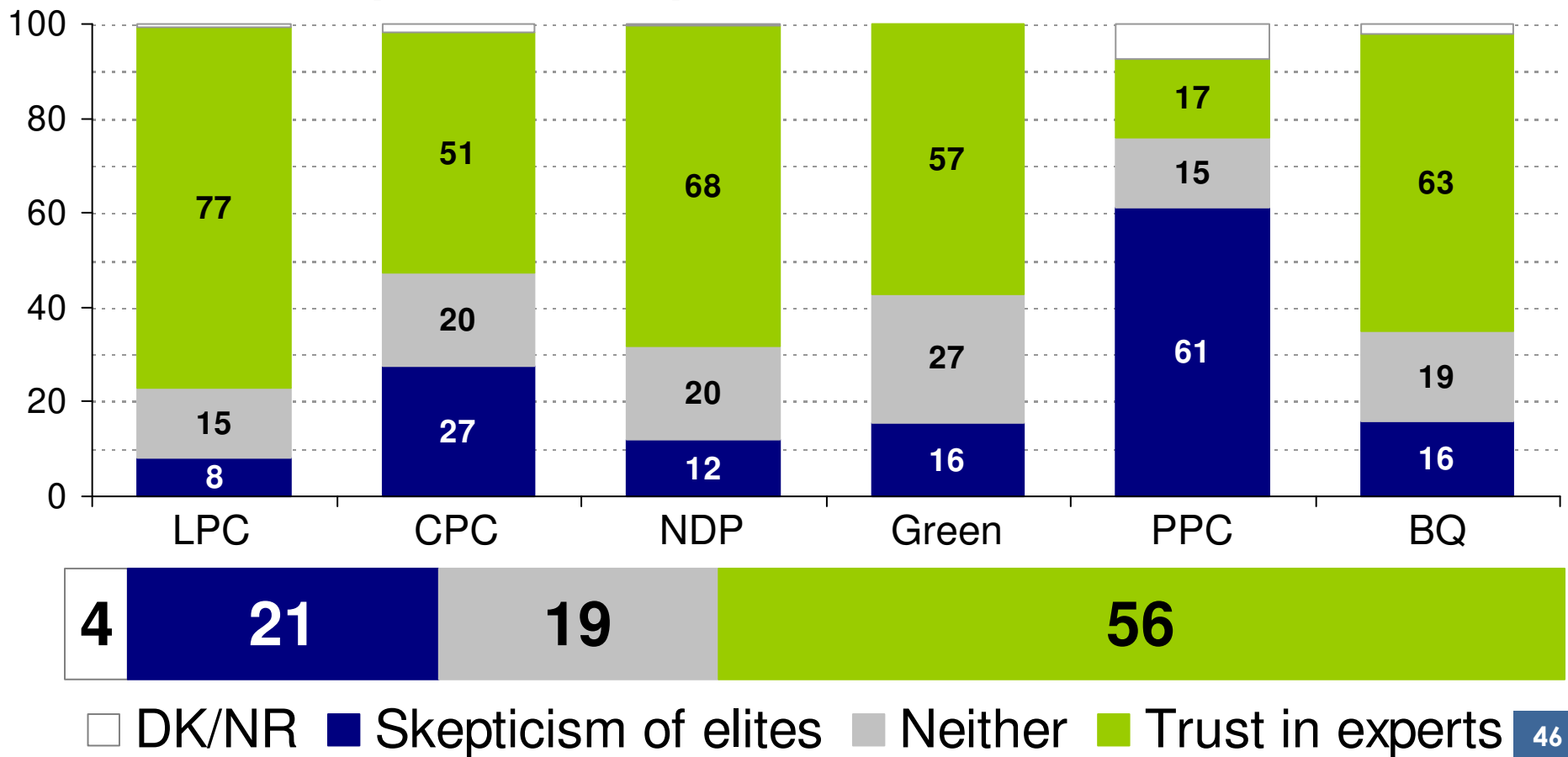
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Open-ordered index

Trust in experts vs. skepticism of elites

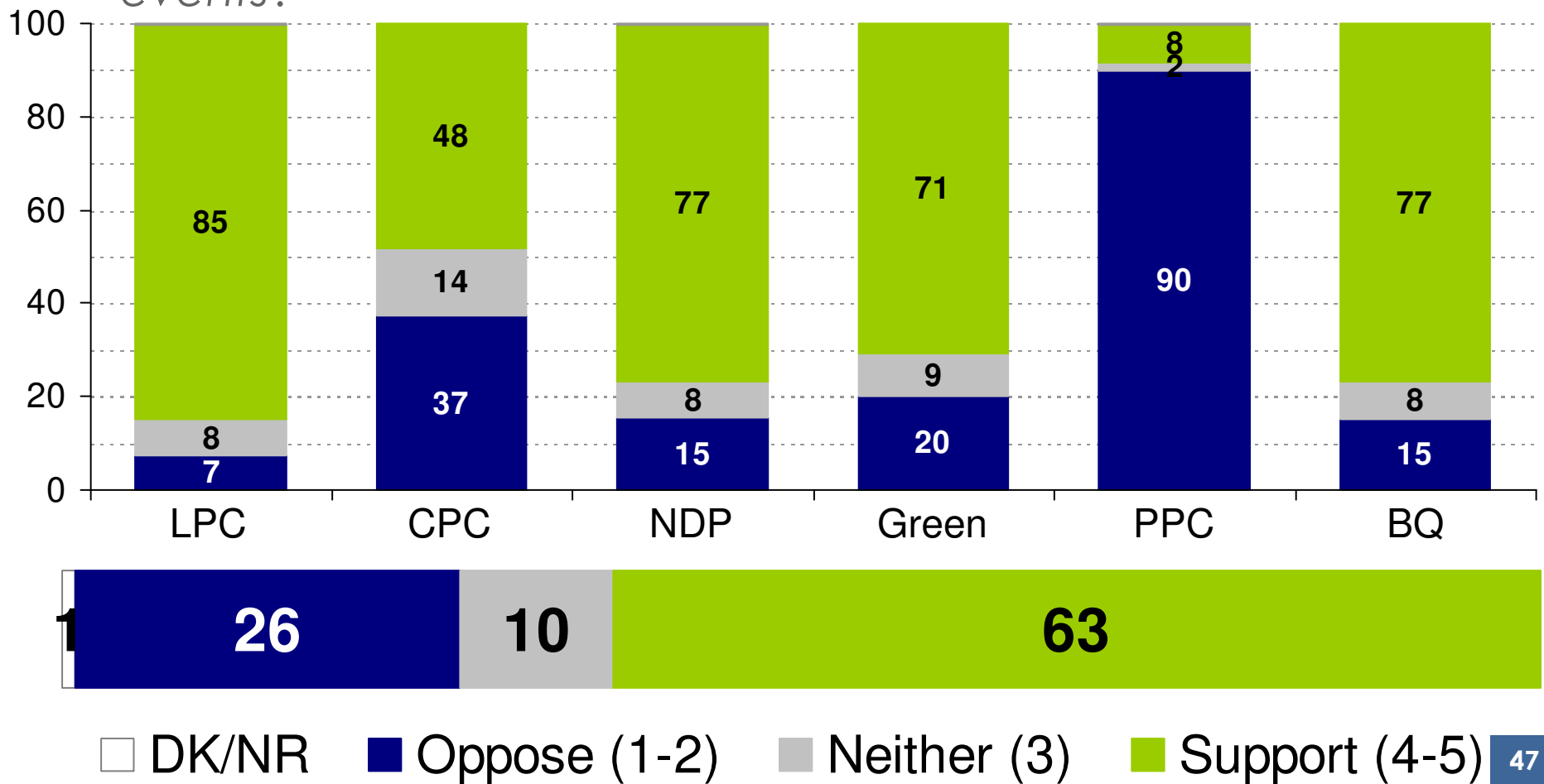
Q. When raising children, which of the following do you think is more important to emphasize?

Trust in experts or skepticism of elites?



Support for vaccine passports

Q. To what extent would you support or oppose a proof-of-vaccination system where Canadians would be required to carry a vaccine passport in order to travel or attend public events?

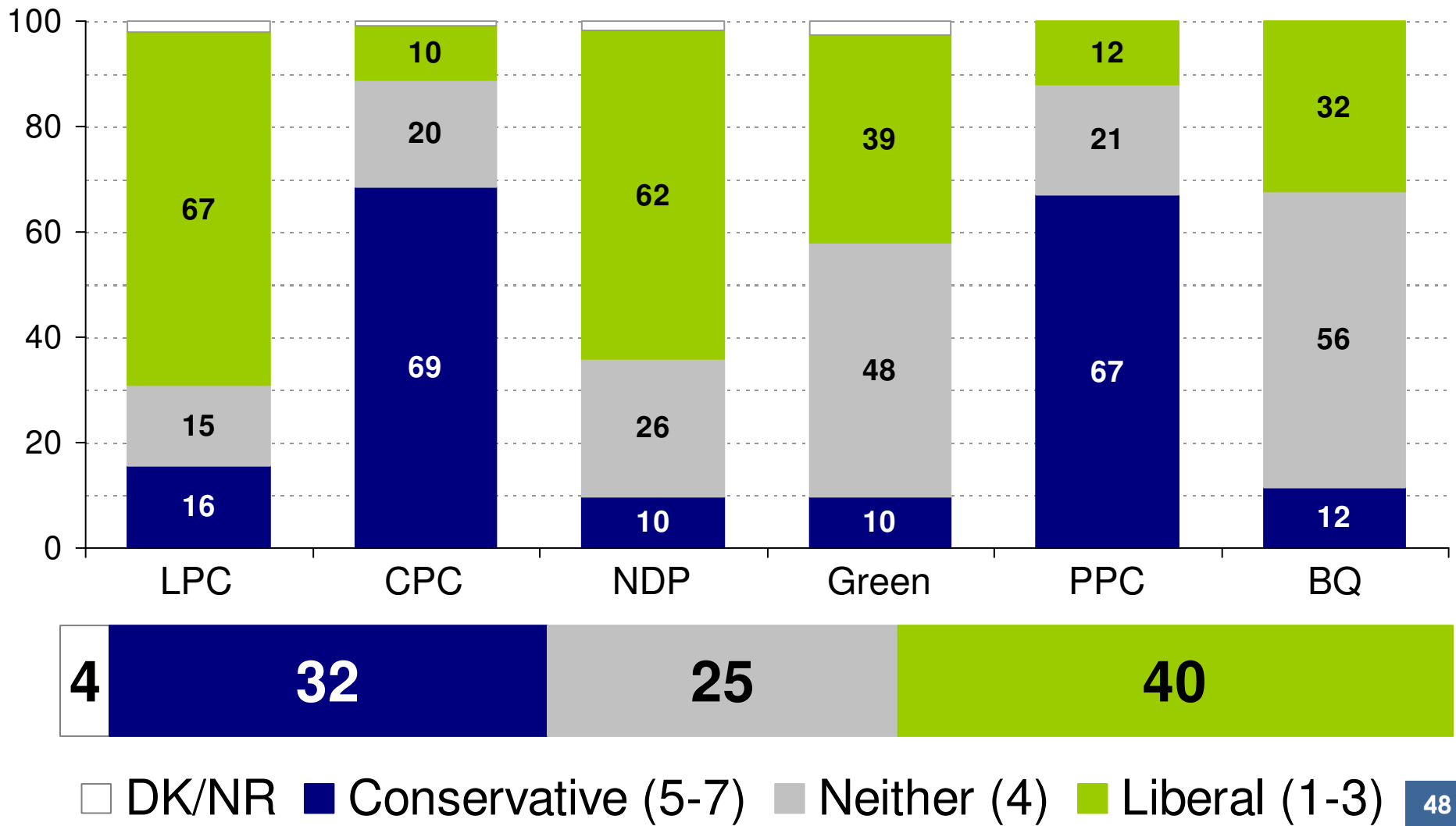


BASE: Canadians; September 1-7, 2021, n=2,788, MOE +/- 1.9%, 19 times out of 20

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Ideology

Q. Forgetting about your current party choice, do you consider yourself a small l liberal or a small c conservative?

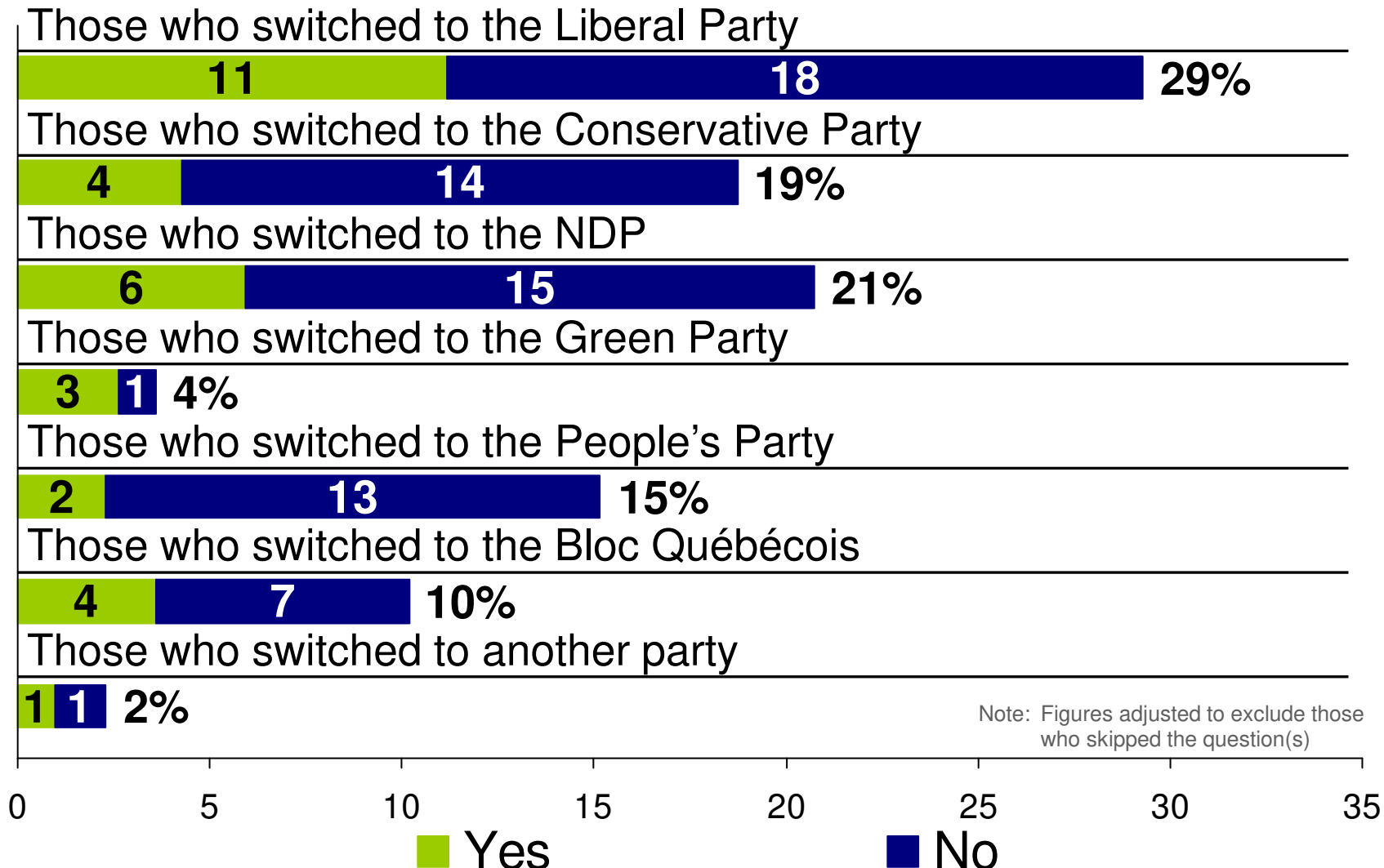


BASE: Canadians; September 8-14, 2021, n=1,618, MOE +/- 2.4%, 19 times out of 20

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Impact of contacts

Q. *Were you contacted by a political party in the final week of the campaign?*





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- 6) **Conclusions**

Conclusions (i)

- » The political landscape is heavily polarized and newly fragmented
- » The era where majorities were readily available and triggered by the 40% vote threshold appears to be over (at least for the foreseeable future)
- » No party captured more than one-third of the 62% who voted and the traditional dominance of centre left and right parties appears to be challenged by a hollowing of the centre
- » Canadians were deeply unhappy with the election result, but there is no evidence that there is fundamentally different outcome available to any party in the near future

Conclusions (ii)

- » People's Party supporters were – by far – the least happy with the election and they will be very interesting to track in the future
 - It appears that this group are deeply institutionally mistrustful but, unlike in U.S., they have no path to political power (which may explain their collapse in turnout)
- » Overall, the polling clearly predicted the election, though it missed the Conservative Party and the People's Party vote by offsetting amounts
- » The campaign had a surface illusion of relatively placid shifts but there was, in fact, considerable churning throughout the election
- » The boundaries between People's Party and Conservative Party are much more fluid than many think and there were large shifts back and forth between the Conservative Party and the People's Party

Conclusions (iii)

- » The Liberal and Conservative Parties also had significant shifts which reversed direction in the later stages of the campaign
- » The NDP and the Liberal Party had significant transfers of voters, but some of the NDP vote switched back to the Liberals or stayed home in the later stages
- » The Quebec race was heavily shaped by the national debate and we saw a flagging Bloc Québécois resuscitated by the National debate



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