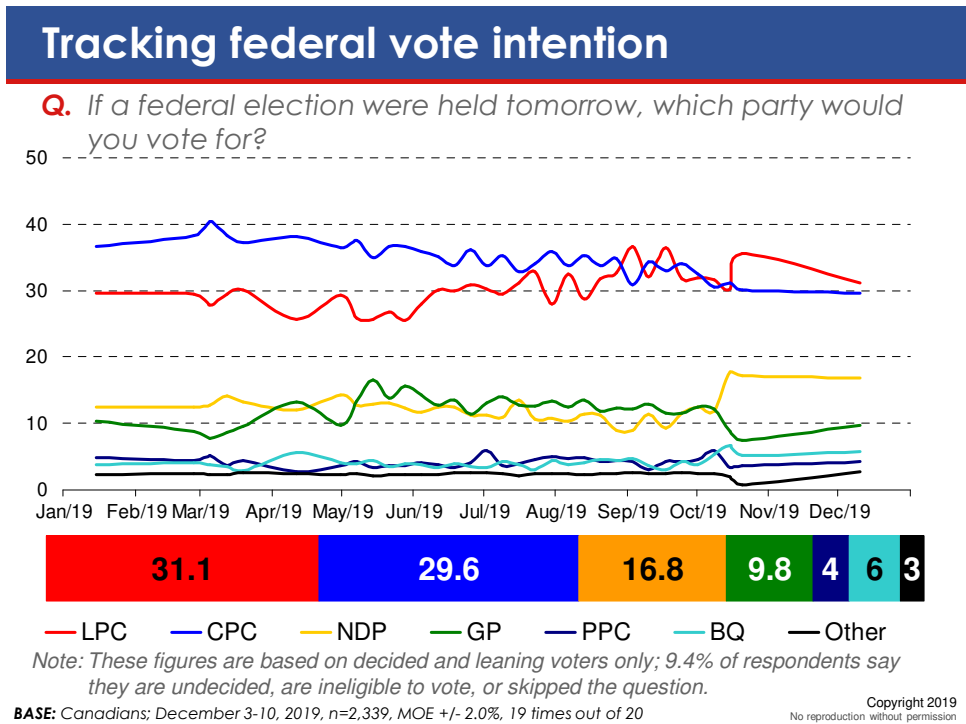## POLITICAL LANDSCAPE FROZEN:

MIRTHLESS ECONOMIC OUTLOOK

[Ottawa – December 12, 2019] The political landscape appears to be as frozen as the land as we move into Canadian winter with a deadlocked and deeply divided citizenry. Vote intention hasn't budged in the past seven weeks, although the Green Party and People's Party are both doing better than on Election Day. Everyone else is pretty much mired in place. It is notable that the Liberals do better with middle class and university educated voters. Support for both the Liberal and Conservative parties rises with age, while the NDP does better with young voters.

Tracking federal vote intention

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

| 31.1 | 29.6 | 16.8 | 9.8 | 4 | 6 | 3 |

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

Note: These figures are based on decided and leaning voters only; 9.4% of respondents say they are undecided, are ineligible to vote, or skipped the question.

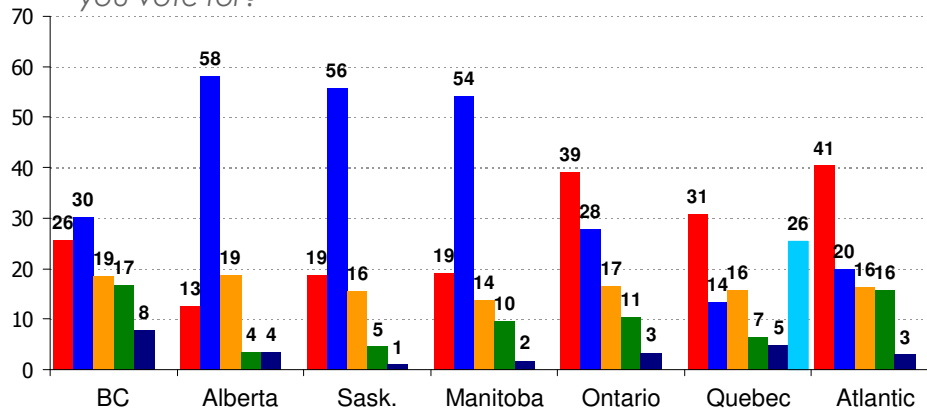**BASE:** *Canadians; December 3-10, 2019, n=2,339, MOE +/- 2.0%, 19 times out of 20*

Young males are overrepresented in the Conservative and People's Party ranks, a phenomenon we have noted for some time. On the other hand, millennial women tend to be overrepresented among progressive choices. This gender cleavage in the millennial generation is an important new feature of the political landscape.

Confidence in direction of both the country and government are both low by historical standards. The deepest levels of dissatisfaction can be found among Conservatives and those who reside in the Prairie provinces. Middle class respondents, university educated, and seniors are comparatively happier with federal direction.
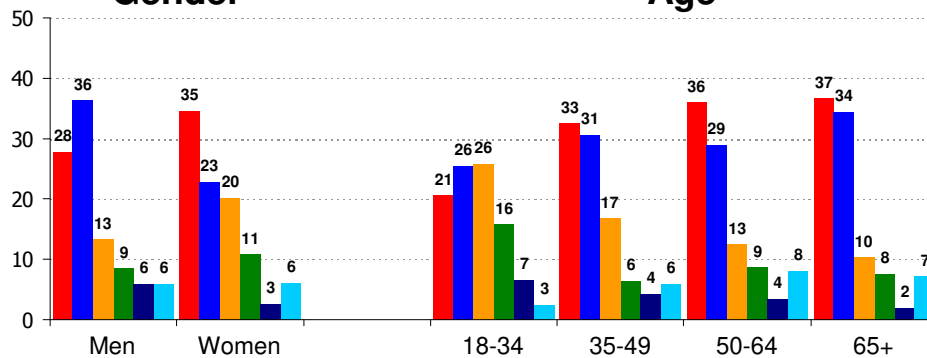
Vote intention by region and demographics

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

Gender
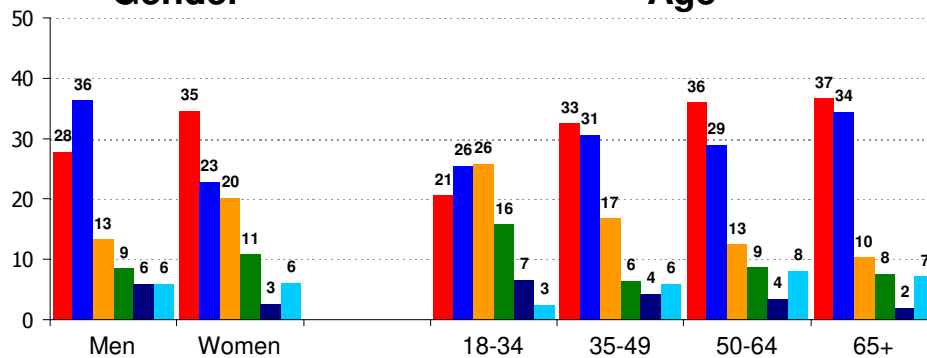
Age

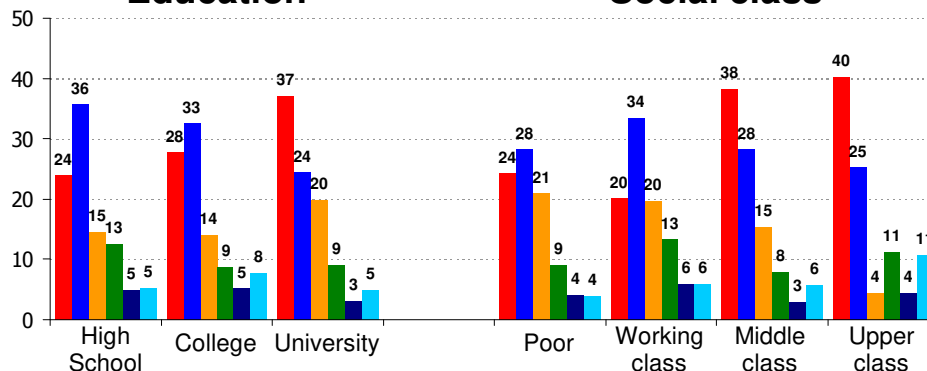**Education**
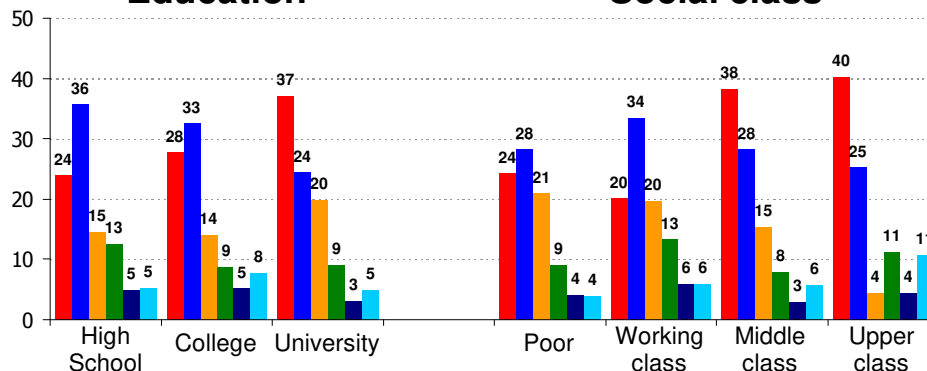
Social class

LPC	CPC	NDP	GP	PPC	BQ	Other
31.1	29.6	16.8	9.8	4	6	3

BASE: *Canadians; December 3-10, 2019, n=2,339, MOE +/- 2.0%, 19 times out of 20*

Direction of country

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

— Wrong direction   — Right direction
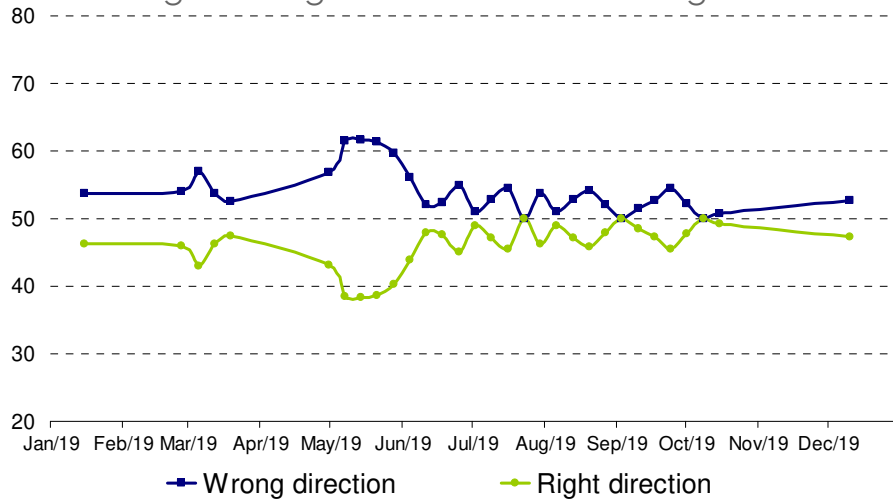
Note: Figures adjusted to exclude those who skipped the question.

BASE: *Canadians (half-sample); December 3-10, 2019, n=1,159, MOE +/- 2.9%, 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?*

— Wrong direction   — Right direction

Note: Figures adjusted to exclude those who skipped the question.

BASE: *Canadians (half-sample); December 3-10, 2019, n=1,179, MOE +/- 2.9%, 19 times out of 20*

Tight three-way race in Ontario

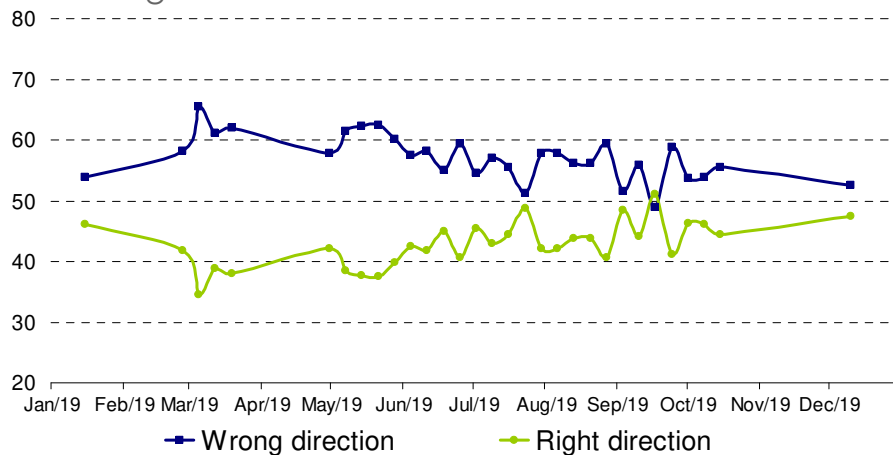The leaderless Ontario Liberal Party has a small (and statistically insignificant) lead, while the Progressive Conservatives are down 11 points from the most recent election. However, the PCs benefit from a split centre-left vote with the NDP now at 24 points, well down from their election performance. PC support is focussed among men and is tightly interwoven with federal Conservative support. Again, PC support is heavily concentrated among young men, while young women have turned almost exclusively to progressive options.

Ontario vote intention

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

EKOS Survey (December 2019)
(Changes since 2018 election below)

29.9	24.4	32.4	9	4
-10.6	-9.2	+12.8	+4.8	+2.2

BASE: *Ontario residents; December 3-10, 2019, n=907, MOE +/- 3.3%, 19 times out of 20*

2018 Ontario Election Results

40.5	33.6	19.6	5	2

■ Progressive Conservative ■ NDP ■ Liberal ■ Green ■ Other

Economic outlook sour but stable

The majority of Canadians – 58 per cent – believe we are in a recession or even a depression, while just 39 per cent say we are in a period of growth. Canadians aren't terribly optimistic about the future either: just 32 per cent foresee a period of growth two years from now. Outlook is significantly worse in the Prairie provinces. It is much darker for members of the Conservative Party.

Perceived versus anticipated state

Perceived state of Canada's economy

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

| 10 | 13 | 36 | 36 | 4 | 3 |

Anticipated state of Canada's economy

Q. *What do you believe Canada's economy will look like **two years from now**?*

| 15 | 19 | 29 | 30 | 4 | 4 |

■ In a depression
■ In a severe recession
■ In a mild recession
■ In a period of moderate growth
■ In a period of strong growth
□ DK/NR

BASE: *Canadians; December 3-10, 2019, n=2,339, MOE +/- 2.0%, 19 times out of 20*

The gig is up?

There is evidence that positive views of the sharing/gig economy are going downward, as a majority sees this as driving down wages rather than improving lives. This is sharply divided by age, with millennials holding a much more positive outlook, which we would guess is a combination of greater comfort with new technologies and a greater emphasis on affordability and pocketbook issues for those in the early stages of their careers.

Of particular note, middle- and upper-class Canadians are more impressed with the benefits of the sharing economy.

Impact of sharing economy

Q. *Some people say that the digital sharing economy, such as sites like Uber and Airbnb, are making our lives better and the economy stronger. Others say that these new methods are driving down wages and leaving gaps in regulation and oversight. Which statement is closer to your point of view?*

December 2019

5	53	42

BASE: *Canadians; December 3-10, 2019, n=2,339, MOE +/- 2.0%, 19 times out of 20*

April 2016

8	47	45

BASE: *Canadians; April 14-15, 2016, n=611, MOE +/- 4.0%, 19 times out of 20*

☐ DK/NR
■ The sharing economy drives down wages
■ The sharing economy makes our lives better

Impact of sharing economy by age

Q. Some people say that the digital sharing economy, such as sites like Uber and Airbnb, are making our lives better and the economy stronger. Others say that these new methods are driving down wages and leaving gaps in regulation and oversight. Which statement is closer to your point of view?

	DK/NR	Drives down wages	Makes our lives better
National	5	53	42
Under 35	4	38	58
35-49	3	53	43
49-64	3	61	36
65 and over	4	64	32

☐ DK/NR
■ The sharing economy drives down wages
■ The sharing economy makes our lives better
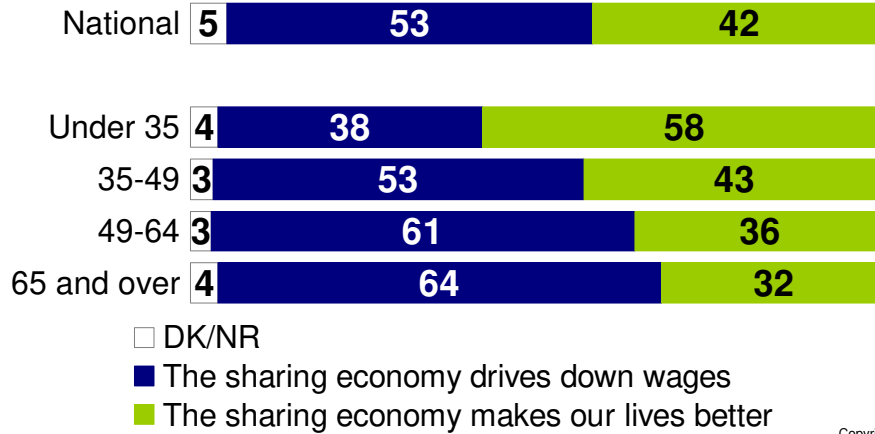
BASE: *Canadians; December 3-10, 2019, n=2,339, MOE +/- 2.0%, 19 times out of 20*

Detailed Results:

National Federal Vote Intention (decided voters/leaning voters 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?

	LPC	CPC	NDP	GP	PPC	BQ	Other	Sample Size		Margin of Error (+/-)
								Weighted	Un-weighted	
NATIONALLY	**31.1%**	**29.6%**	**16.8%**	**9.8%**	**4.2%**	**5.8%**	**2.7%**	**2118**	**2111**	**2.1**
REGION										
British Columbia	25.6%	30.1%	18.6%	16.8%	7.8%	–	0.9%	299	280	5.9
Alberta	12.6%	58.1%	18.7%	3.6%	3.5%	–	3.5%	240	327	5.4
Saskatchewan*	18.7%	55.8%	15.5%	4.5%	1.0%	–	4.5%	65	96	10.0
Manitoba*	19.2%	54.2%	13.8%	9.6%	1.8%	–	1.5%	71	78	11.1
Ontario	39.1%	27.9%	16.6%	10.5%	3.3%	–	2.6%	820	828	3.4
Quebec	30.7%	13.5%	15.7%	6.6%	5.0%	25.5%	2.9%	486	349	5.3
Atlantic Canada*	40.5%	19.9%	16.3%	15.8%	2.9%	–	4.7%	138	153	7.9
GENDER										
Male	27.8%	36.3%	13.3%	8.6%	5.9%	5.9%	2.2%	1019	1063	3.0
Female	34.5%	22.8%	20.3%	10.8%	2.7%	6.1%	2.8%	1052	1001	3.1
AGE										
<35	20.5%	25.5%	25.8%	15.8%	6.5%	2.5%	3.4%	574	198	7.0
35-49	32.6%	30.6%	16.8%	6.4%	4.3%	6.0%	3.2%	526	324	5.4
50-64	36.1%	28.9%	12.5%	8.7%	3.5%	8.0%	2.2%	563	648	3.9
65+	36.7%	34.3%	10.3%	7.6%	2.0%	7.3%	1.9%	449	934	3.2
EDUCATION										
High school or less	24.0%	35.6%	14.6%	12.5%	4.9%	5.3%	3.0%	483	515	4.3
College or CEGEP	27.7%	32.5%	14.0%	8.8%	5.1%	7.7%	4.2%	663	671	3.8
University or higher	37.2%	24.4%	19.8%	9.0%	3.2%	4.9%	1.5%	959	911	3.3
SOCIAL CLASS										
Poor	24.2%	28.3%	20.9%	9.0%	4.1%	3.9%	9.7%	263	244	6.3
Working class	20.1%	33.5%	19.6%	13.3%	5.9%	6.0%	1.7%	643	602	4.0
Middle class	38.3%	28.2%	15.4%	8.0%	3.0%	5.7%	1.4%	1071	1128	2.9
Upper class	40.3%	25.3%	4.4%	11.3%	4.4%	10.7%	3.7%	125	125	8.8

Note that due to the small sample sizes, results for these regions should be interpreted with caution

Direction of Country

Q. [HALF-SAMPLE] First, all things considered, would you say the country is moving in the right direction or the wrong direction?

	Right direction	Wrong direction	Skip	Sample Size		Margin of Error (+/-)
				Weighted	Un-weighted	
NATIONALLY	**44.8%**	**49.9%**	**5.3%**	**1193**	**1159**	**2.9**
REGION						
British Columbia	44.3%	47.2%	8.5%	160	144	8.2
Alberta	24.2%	71.6%	4.2%	134	180	7.3
Saskatchewan*	50.8%	46.5%	2.7%	37	46	14.5
Manitoba*	27.4%	70.0%	2.6%	38	39	15.7
Ontario	49.3%	45.7%	5.0%	474	469	4.5
Quebec	48.3%	46.5%	5.2%	276	195	7.0
Atlantic Canada*	46.9%	47.8%	5.2%	74	86	10.6
GENDER						
Male	45.3%	50.8%	3.9%	558	561	4.1
Female	46.8%	50.5%	2.6%	581	545	4.2
AGE						
<35	40.9%	56.2%	2.8%	339	114	9.2
35-49	44.6%	53.0%	2.4%	286	176	7.4
50-64	47.3%	49.4%	3.3%	299	348	5.3
65+	51.2%	43.2%	5.6%	241	492	4.4
EDUCATION						
High school or less	40.8%	55.2%	4.0%	261	270	6.0
College or CEGEP	39.4%	56.9%	3.7%	336	337	5.3
University or higher	51.6%	45.5%	2.8%	566	521	4.3
VOTE INTENTION						
Liberal	83.3%	14.2%	2.4%	312	330	5.4
Conservative	16.6%	81.1%	2.3%	324	348	5.3
NDP	54.5%	43.5%	2.0%	186	146	8.1
Green	45.1%	51.5%	3.4%	111	90	10.3
People's Party	15.1%	78.0%	6.8%	46	39	15.7
Bloc Québécois	42.3%	51.1%	6.6%	71	62	12.5

Note that due to the small sample sizes, results for these regions should be interpreted with caution

Direction of Government

Q. [HALF-SAMPLE] First, all things considered, would you say the government of Canada is moving in the right direction or the wrong direction?

	Right direction	Wrong direction	Skip	Sample Size		Margin of Error (+/-)
				Weighted	Un-weighted	
NATIONALLY	**45.0%**	**49.9%**	**5.1%**	**1142**	**1179**	**2.9**
REGION						
British Columbia	40.7%	53.6%	5.7%	169	170	7.5
Alberta	24.5%	70.6%	4.9%	136	181	7.3
Saskatchewan*	43.9%	54.9%	1.2%	34	58	12.9
Manitoba*	42.9%	49.0%	8.1%	41	46	14.5
Ontario	50.0%	44.8%	5.2%	422	443	4.7
Quebec	50.0%	46.1%	3.9%	255	187	7.2
Atlantic Canada*	47.1%	45.2%	7.7%	86	94	10.1
GENDER						
Male	42.3%	53.5%	4.2%	530	573	4.1
Female	48.6%	47.6%	3.8%	566	560	4.1
AGE						
<35	39.9%	55.1%	5.0%	279	99	9.9
35-49	43.0%	54.1%	2.9%	272	170	7.5
50-64	47.7%	49.0%	3.3%	319	363	5.1
65+	52.6%	43.0%	4.4%	251	526	4.3
EDUCATION						
High school or less	36.9%	58.8%	4.3%	276	307	5.6
College or CEGEP	38.6%	56.7%	4.7%	382	393	4.9
University or higher	57.0%	40.3%	2.7%	457	452	4.6
VOTE INTENTION						
Liberal	89.0%	7.6%	3.4%	346	370	5.1
Conservative	9.3%	88.9%	1.8%	302	374	5.1
NDP	50.5%	47.2%	2.2%	165	135	8.4
Green	33.1%	61.8%	5.2%	98	84	10.7
People's Party	15.9%	73.7%	10.4%	43	31	17.6
Bloc Québécois	27.6%	68.8%	3.5%	53	51	13.7

Note that due to the small sample sizes, results for these regions should be interpreted with caution

Ontario Vote Intention (decided voters/leaning voters only)

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?

	Liberal Party of Ontario	Progressive Conservative Party of Ontario	New Democratic Party of Ontario	Green Party of Ontario	Other	Sample Size		Margin of Error (+/-)
						Weighted	Un-weighted	
NATIONALLY	**32.4%**	**29.9%**	**24.4%**	**9.4%**	**3.9%**	**788**	**811**	**3.4**
GENDER								
Male	28.5%	39.7%	20.7%	6.9%	4.3%	386	413	4.8
Female	36.3%	20.7%	28.2%	11.7%	3.1%	384	380	5.0
AGE								
<35	20.8%	23.5%	33.9%	15.9%	5.9%	214	73	11.5
35-49	32.9%	34.1%	19.4%	8.1%	5.5%	182	113	9.2
50-64	41.3%	26.9%	22.7%	7.3%	1.8%	198	228	6.5
65+	36.4%	36.3%	20.3%	4.8%	2.3%	190	393	4.9
EDUCATION								
High school or less	35.1%	27.8%	22.3%	6.9%	7.8%	174	189	7.1
College or CEGEP	26.1%	37.0%	26.0%	7.9%	3.0%	221	240	6.3
University or higher	34.8%	27.1%	24.8%	11.0%	2.3%	388	377	5.1
SOCIAL CLASS								
Poor	20.5%	26.3%	37.7%	6.8%	8.7%	96	85	10.6
Working class	19.9%	35.8%	29.8%	10.4%	4.1%	217	207	6.8
Middle class	39.9%	27.7%	20.1%	9.6%	2.7%	418	461	4.6
Upper class	47.8%	28.0%	14.3%	8.2%	1.6%	49	52	13.6
VOTE INTENTION								
Liberal	70.5%	5.6%	19.5%	4.3%	0.1%	304	340	5.3
Conservative	3.2%	86.7%	4.3%	0.5%	5.4%	220	245	6.3
NDP	11.9%	2.6%	77.6%	7.9%	0.0%	125	92	10.2
Green	13.3%	1.6%	23.8%	58.7%	2.5%	80	73	11.5
People's Party	8.2%	70.0%	1.9%	4.1%	15.8%	23	23	20.4

Note that due to the small sample sizes, results for these regions should be interpreted with caution

State of Canada's Economy

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

	In a depression	In a severe recession	In a mild recession	In a period of moderate growth	In a period of strong growth	Skip	Sample Size Weighted	Sample Size Un-weighted	Margin of Error (+/-)
NATIONALLY	**9.6%**	**12.6%**	**35.7%**	**35.5%**	**3.7%**	**2.9%**	**2339**	**2339**	**2.0**
REGION									
British Columbia	4.7%	11.4%	41.3%	36.4%	2.6%	3.5%	329	314	5.5
Alberta	18.4%	25.9%	39.9%	11.3%	1.4%	3.1%	270	361	5.2
Saskatchewan*	16.0%	18.0%	45.0%	19.1%	0.6%	1.4%	71	104	9.6
Manitoba*	11.6%	20.3%	39.9%	22.7%	0.0%	5.6%	79	85	10.6
Ontario	8.9%	9.7%	37.6%	38.7%	3.1%	2.0%	895	912	3.3
Quebec	8.1%	7.6%	27.9%	45.9%	7.2%	3.3%	535	383	5.0
Atlantic Canada*	10.7%	20.0%	26.2%	34.6%	4.9%	3.7%	159	180	7.3
GENDER									
Male	8.9%	11.7%	34.9%	38.6%	5.1%	0.8%	1088	1134	2.9
Female	10.0%	14.2%	37.8%	34.0%	2.7%	1.4%	1152	1106	3.0
AGE									
<35	11.8%	15.5%	36.3%	31.7%	2.6%	2.2%	622	214	6.7
35-49	11.3%	15.1%	35.1%	33.3%	4.1%	1.1%	558	346	5.3
50-64	8.0%	10.8%	38.5%	37.4%	4.9%	0.4%	617	711	3.7
65+	7.8%	9.3%	34.8%	43.2%	3.7%	1.2%	492	1018	3.1
EDUCATION									
High school or less	18.7%	16.5%	32.8%	26.8%	3.3%	2.0%	542	578	4.1
College or CEGEP	8.8%	15.9%	40.4%	29.8%	4.2%	0.8%	718	730	3.6
University or higher	5.6%	8.6%	35.6%	45.7%	3.8%	0.8%	1023	973	3.1
VOTE INTENTION									
Liberal	4.6%	3.1%	28.0%	56.5%	7.5%	0.3%	658	700	3.7
Conservative	12.1%	22.1%	44.7%	19.7%	1.0%	0.5%	626	722	3.7
NDP	8.5%	9.7%	40.8%	37.7%	1.7%	1.6%	355	282	5.8
Green	9.3%	15.5%	35.9%	34.7%	2.1%	2.5%	208	174	7.4
People's Party	26.0%	22.8%	31.0%	14.6%	1.6%	4.0%	89	70	11.7
Bloc Québécois	6.1%	8.5%	29.5%	48.7%	6.7%	0.5%	124	113	9.2

Note that due to the small sample sizes, results for these regions should be interpreted with caution

Anticipated State of Canada's Economy

Q. What do you believe Canada's economy will look like two years from now? Would you say the economy will be . . .?

	In a depression	In a severe recession	In a mild recession	In a period of moderate growth	In a period of strong growth	Skip	Sample Size		Margin of Error (+/-)
							Weighted	Un-weighted	
NATIONALLY	**14.8%**	**18.6%**	**28.6%**	**30.0%**	**4.4%**	**3.7%**	**2339**	**2339**	**2.0**
REGION									
British Columbia	13.8%	15.3%	29.7%	30.8%	3.3%	7.1%	329	314	5.5
Alberta	23.0%	30.1%	24.2%	16.6%	2.9%	3.2%	270	361	5.2
Saskatchewan*	20.7%	25.9%	21.8%	25.4%	4.3%	2.0%	71	104	9.6
Manitoba*	22.7%	25.2%	26.6%	23.0%	0.6%	1.9%	79	85	10.6
Ontario	13.7%	16.5%	29.3%	33.0%	4.2%	3.3%	895	912	3.3
Quebec	11.1%	16.0%	33.1%	31.1%	5.9%	2.8%	535	383	5.0
Atlantic Canada*	14.3%	19.5%	19.0%	36.1%	7.2%	3.9%	159	180	7.3
GENDER									
Male	13.6%	19.4%	30.9%	29.5%	5.8%	0.9%	1088	1134	2.9
Female	16.0%	18.7%	27.7%	31.6%	3.2%	2.8%	1152	1106	3.0
AGE									
<35	21.5%	19.7%	23.2%	27.4%	5.2%	3.0%	622	214	6.7
35-49	17.1%	19.9%	30.2%	28.9%	2.8%	1.1%	558	346	5.3
50-64	11.5%	19.8%	31.6%	30.0%	5.4%	1.7%	617	711	3.7
65+	9.1%	15.1%	32.0%	37.5%	4.4%	1.9%	492	1018	3.1
EDUCATION									
High school or less	25.3%	17.9%	22.9%	27.4%	4.1%	2.4%	542	578	4.1
College or CEGEP	15.6%	23.9%	27.3%	27.2%	4.8%	1.2%	718	730	3.6
University or higher	9.3%	15.5%	33.9%	34.8%	4.3%	2.2%	1023	973	3.1
VOTE INTENTION									
Liberal	5.6%	5.4%	29.3%	49.8%	8.4%	1.5%	658	700	3.7
Conservative	24.2%	31.4%	28.0%	14.6%	1.0%	0.8%	626	722	3.7
NDP	12.6%	16.2%	31.3%	34.1%	3.1%	2.8%	355	282	5.8
Green	15.9%	16.3%	29.8%	32.6%	2.1%	3.4%	208	174	7.4
People's Party	18.9%	37.1%	28.9%	3.5%	4.2%	7.5%	89	70	11.7
Bloc Québécois	9.7%	17.6%	33.1%	31.8%	7.3%	0.5%	124	113	9.2

Note that due to the small sample sizes, results for these regions should be interpreted with caution

Impact of Sharing Economy

Q. Some people say that the digital sharing economy, such as sites like Uber and Airbnb, are making our lives better and the economy stronger. Others say that these new methods are driving down wages and leaving gaps in regulation and oversight. Which statement is closer to your point of view?

	The sharing economy makes our lives better	The sharing economy drives down wages	Skip	Sample Size		Margin of Error (+/-)
				Weighted	Un-weighted	
NATIONALLY	**42.2%**	**52.5%**	**5.3%**	**2339**	**2339**	**2.0**
REGION						
British Columbia	48.8%	43.1%	8.1%	329	314	5.5
Alberta	42.4%	50.6%	6.9%	270	361	5.2
Saskatchewan*	50.9%	46.7%	2.5%	71	104	9.6
Manitoba*	43.0%	55.0%	1.9%	79	85	10.6
Ontario	39.4%	56.3%	4.2%	895	912	3.3
Quebec	40.6%	54.7%	4.7%	535	383	5.0
Atlantic Canada*	45.2%	47.2%	7.6%	159	180	7.3
GENDER						
Male	44.0%	52.0%	4.0%	1088	1134	2.9
Female	42.8%	54.4%	2.8%	1152	1106	3.0
AGE						
<35	58.0%	37.9%	4.0%	622	214	6.7
35-49	43.4%	53.3%	3.3%	558	346	5.3
50-64	36.1%	60.9%	3.0%	617	711	3.7
65+	32.3%	63.7%	4.0%	492	1018	3.1
EDUCATION						
High school or less	41.8%	53.6%	4.7%	542	578	4.1
College or CEGEP	41.9%	54.4%	3.7%	718	730	3.6
University or higher	44.8%	52.7%	2.5%	1023	973	3.1
VOTE INTENTION						
Liberal	46.7%	50.8%	2.5%	658	700	3.7
Conservative	43.8%	53.0%	3.2%	626	722	3.7
NDP	39.3%	58.8%	1.9%	355	282	5.8
Green	47.8%	46.7%	5.4%	208	174	7.4
People's Party	42.0%	48.9%	9.2%	89	70	11.7
Bloc Québécois	30.6%	66.0%	3.4%	124	113	9.2

*Note that due to the small sample sizes, results for these regions should be interpreted with caution

Methodology:

This survey 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 December 3-10, 2019. In total, a random sample of 2,339 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/- 2.0 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, and region** to ensure the sample's composition reflects that of the actual population of Canada according to Census data.