

CLEAR FORCES, HIGHLY UNPREDICTABLE OUTCOMES:

[Ottawa – July 17, 2015] There is not much going on out there in summer vacation land, but we do see some modest shifts in our most recent polling. While everyone is focussed on cottages, pools and BBQs, let's try and set the stage for the inevitable return to what is going to be an exceedingly important and interesting campaign. We will begin by noting what we see as some of the relatively stable and important features of the voter landscape.

First of all, the outcome of the next election, at this stage is as clear as mud and the likelihood of it getting sharply clearer is unlikely. In addition to being one of the highest stakes elections in a long time, it has the added complexity of being a pollster's nightmare rooted in an array of unique advantages and weaknesses confronting the three main contenders for power. Despite the opaque nature of our lens on the future, the key forces which will drive the electorate are increasingly clear.

Federal vote intention

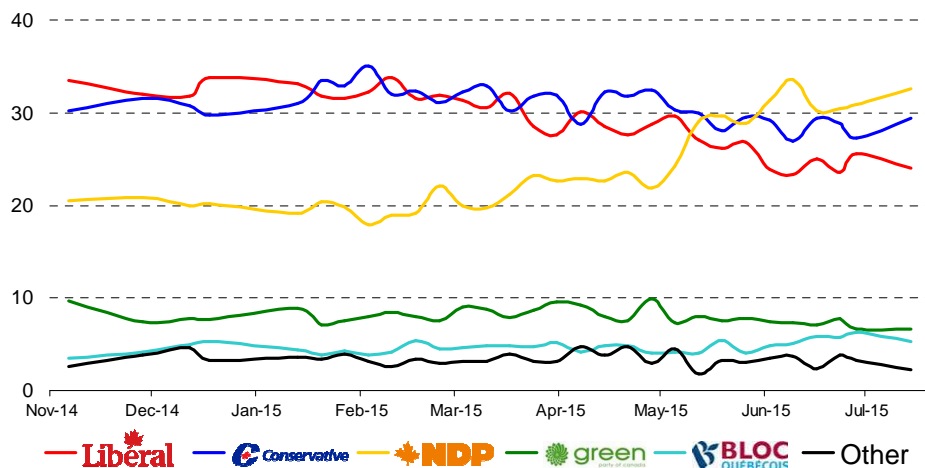
Q. If a federal election were held tomorrow, which party would you vote for?

National Results

(Change over June 24-28 poll below)



2011 Election Results



Note: These figures are based on decided and leaning voters only; 6.4% of respondents say they are undecided and 9.8% are ineligible to vote / skipped the question.

Copyright 2015
No reproduction without permission

BASE: Canadians; July 8-14, 2015 (n=2,538), MOE +/- 2.0%, 19 times out of 20

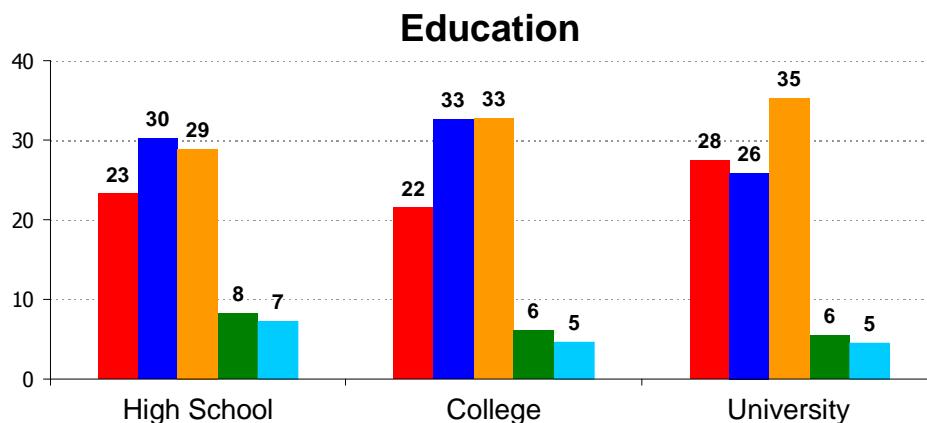
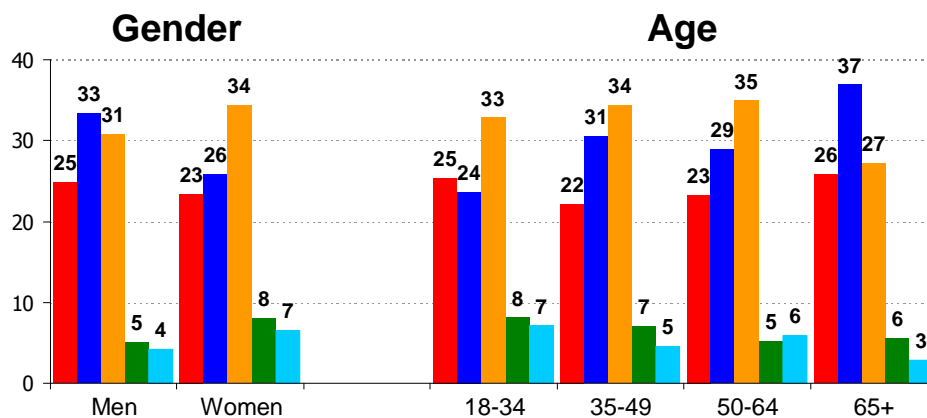
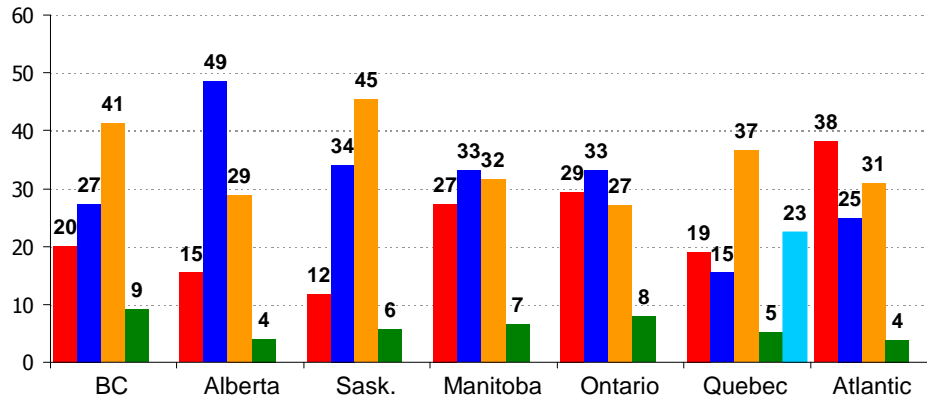
We see that at 33 points, the NDP maintains a modest, but stable lead. At 29 points, the Conservatives are hanging in, although they are still down 10 points from their 2011 election result. Nevertheless, we see evidence of a Conservatives recovery based largely on issues related to security and culture, but more on this later. The Liberals are nine points back from the lead, but are still very much in contention. The Green Party is stuck at around seven points and has fallen out of a lot of races in British Columbia. Their decline is inversely proportional to the NDP rise in B.C. (who they most directly compete with).

The NDP is doing well in Quebec, but would be completely in the driver seat save for the re-entry of Gilles Duceppe (who is at 23 points in Quebec). Between the two parties, the NDP and Bloc Québécois have 60 per cent of the Quebec vote and the outcome of that race very much depends on how the Bloc fares in the future. Ontario is once again a tight three-way race, but the NDP has fallen back somewhat and there is only a six-point spread separating the three major parties. This is a real vote splitting disaster percolating for both the NDP and the Liberals.

Directional measures on the country remain very poor. They are approaching historical nadirs and this doubles the challenge for the Conservatives. This is most likely due to the moribund economy (we will be updating our economic outlook indicators this week).

Vote intention by key demographics

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



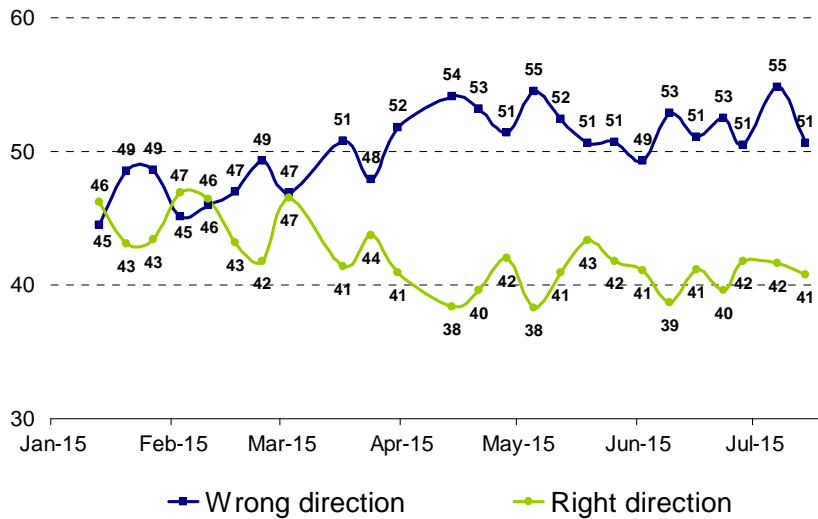
Liberal
 Conservative
 NDP
 Green
 BLOC QUÉBÉCOIS
 Other

Copyright 2015
No reproduction without permission

BASE: Canadians; July 8-14, 2015 (n=2,538), 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?

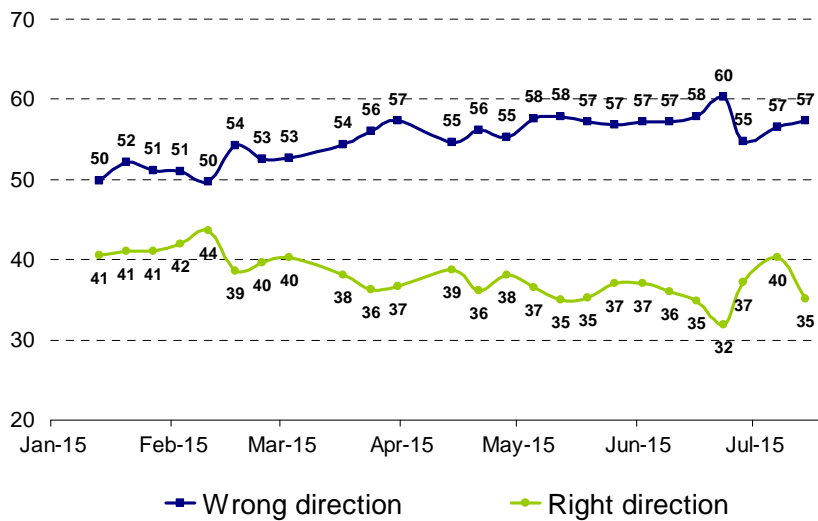


Copyright 2015
No reproduction without permission

BASE: Canadians (half-sample); July 8-14, 2015 (n=1,232), MOE +/- 2.8%, 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?



Copyright 2015
No reproduction without permission

BASE: Canadians (half-sample); July 8-14, 2015 (n=1,306), MOE +/- 2.7%, 19 times out of 20

Economy remains biggest driver

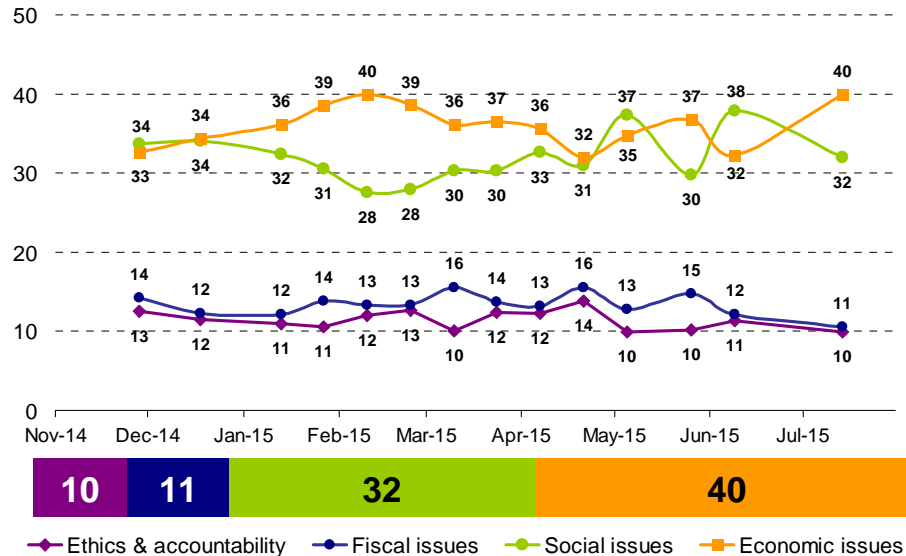
There are two main reasons why the Conservatives are having serious difficulty getting over 30 points (which is the minimum floor to be in serious contention to win a stable government). The first is economic stagnation. However, it is important to remember that Canadians' definition of the economy transcends mere interest rates and unemployment rates. Canadians are more focussed on the questions of how to deal with an economy that no longer produces good jobs, benefits, and security and where wealth seems increasingly concentrated in the hands of the few. Wednesday's announcement from the Bank of Canada that the country may indeed be in a recession certainly will not bode well for the Conservative Party's fortunes, but it is not country's balance sheet that has Canadians down, which leads into the second force: regime fatigue. The Conservatives have been in power nearly ten years and during this time, Canadians have not felt a significant improvement in their standing of living. Instead, the economy is seen as being in recession and the vast majority of Canadians actually see themselves as stagnant or as worse off than they were when Stephen Harper achieved his stable majority.¹

Another issue that has been gaining tracking lately is that of security and terrorism. As we entered the summer, terrorism and security seemed to be dropping off the radar altogether. However, it appears that the Conservatives have at least temporarily resuscitated these issues (thanks in no small part to their controversial ISIS ads). Sixteen per cent of Canadians now rate this as their most important election issue, compared to eleven per cent last month.

¹ EKOS Research Associates, "Budget Lands with a Thud as Voters' Intentions Locked In", May 1, 2015. Available online at: <http://goo.gl/taMH0v>

Most important issue

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

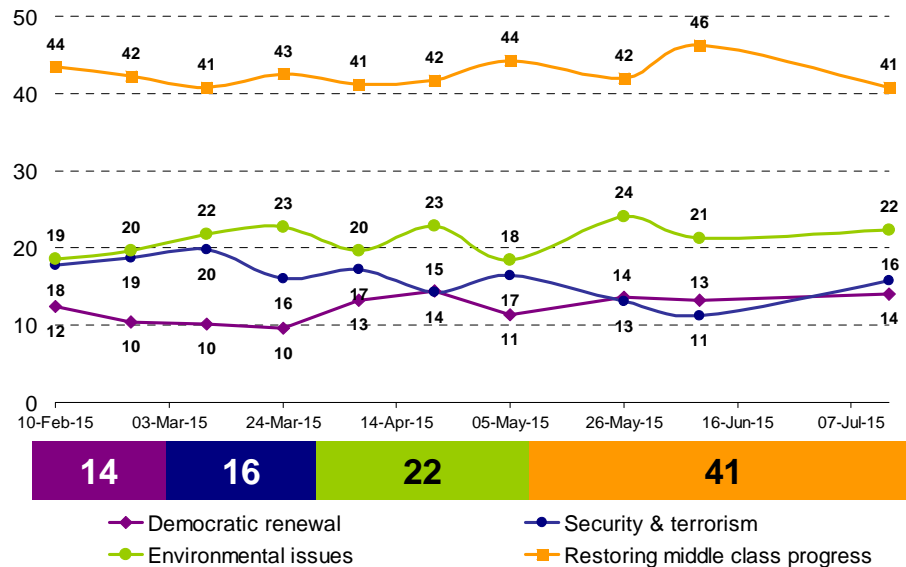


Copyright 2015
No reproduction without permission

BASE: Canadians (third-sample); July 8-14, 2015 (n=1,243), MOE +/- 2.8%, 19 times out of 20

Most important issue

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



Copyright 2015
No reproduction without permission

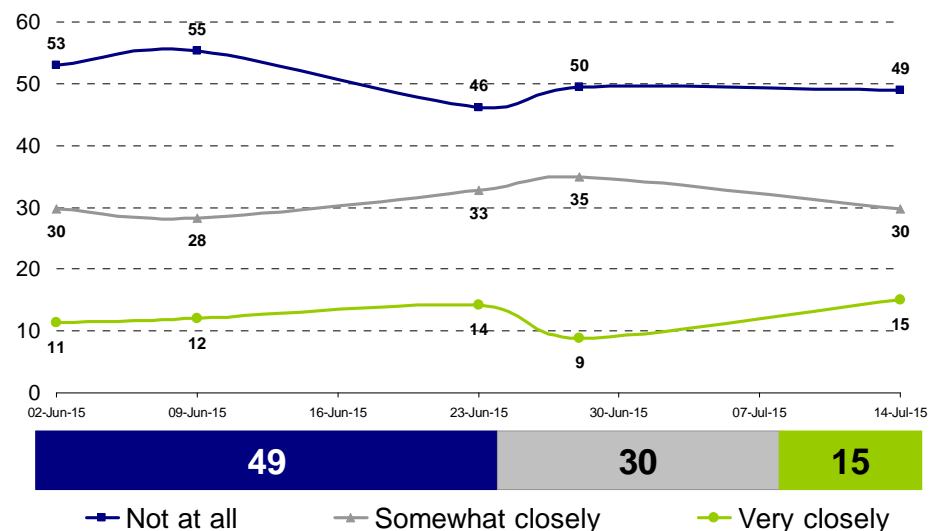
BASE: Canadians (third-sample); July 8-14, 2015 (n=1,295), MOE +/- 2.7%, 19 times out of 20

Is the security card working?

This week, we updated our tracking on attention to various issues, namely announcements and advertising from each of the three main parties. Interestingly, the proportion of Canadians who say they have been paying attention to paid advertising by the Conservative Party has jumped six points in the last two weeks, which is not surprising given the controversy surrounding the use of ISIS videos in their ads. While most of the progressives and intelligentsia recoiled at the horrific and exploitative nature of the ads, the party has succeeded in connecting with their constituency of older and less educated Canadians. This adds fuel to the hypothesis that terror was a significant force elevating Conservative fortunes slightly and that it is one of the few remaining trump cards in a cupboard bare of political advantages.

Attention to Conservative advertising

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? **Paid advertising by the Conservative Party for the next election**



Copyright 2015
No reproduction without permission

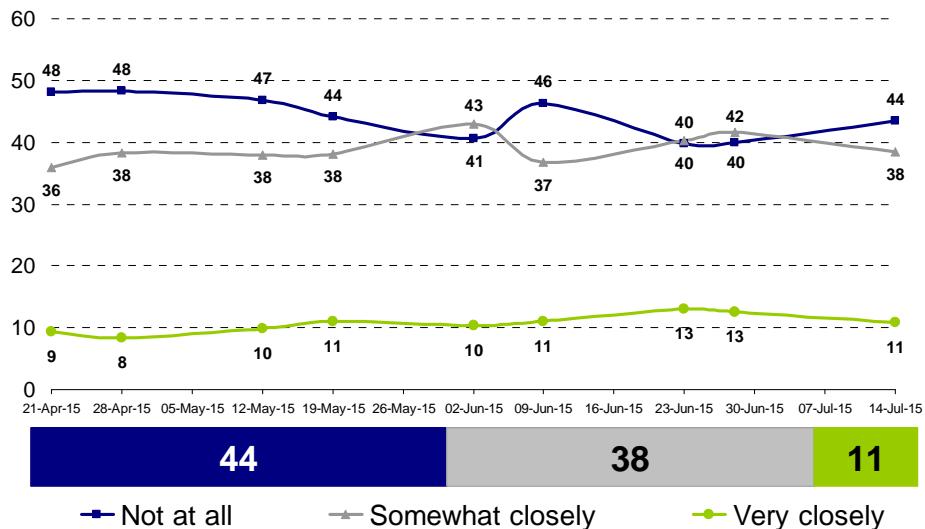
BASE: Canadians (third-sample); July 8-14, 2015 (n=899), MOE +/- 3.3%, 19 times out of 20

Attention to speeches and announcements by Justin Trudeau, meanwhile, has flatlined, which suggest that the party's problems are connected to their inability to penetrate the noise floor that has kept them from connecting with Canadians and establishing themselves as the obvious progressive alternate. There was evidence that the successive high profile launches of various policy initiatives over the past six weeks moved the dials upward on "best plans",² but as attention dropped, their support dropped as well.

² EKOS Research Associates, "Race Narrowing Agair", July 3, 2015. Available online at: <http://goo.gl/oiTFx0>

Attention to announcements by Trudeau

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? **Speeches and announcements by Justin Trudeau over the past month**

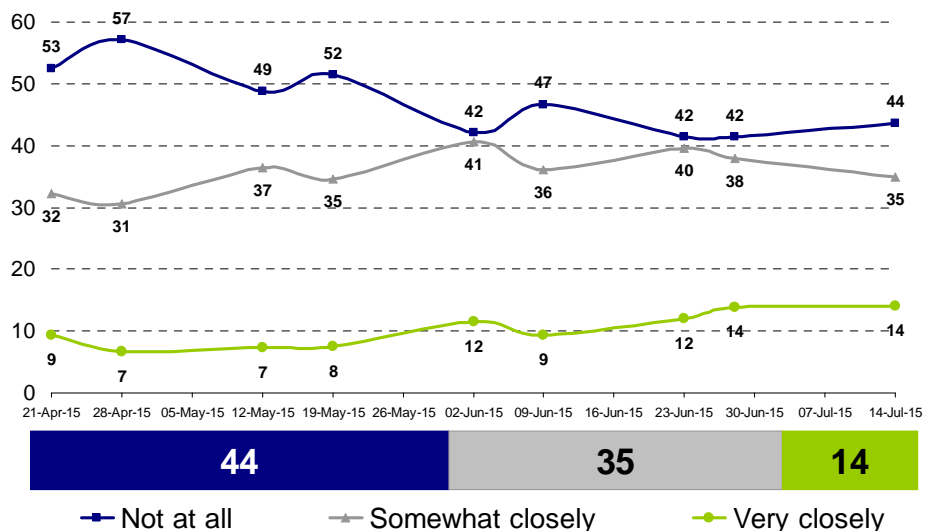


Copyright 2015
No reproduction without permission

BASE: Canadians (half-sample); July 8-14, 2015 (n=1,259), MOE +/- 2.8%, 19 times out of 20

Attention to announcements by Mulcair

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? **Speeches and announcements by Thomas Mulcair over the past month**



Copyright 2015
No reproduction without permission

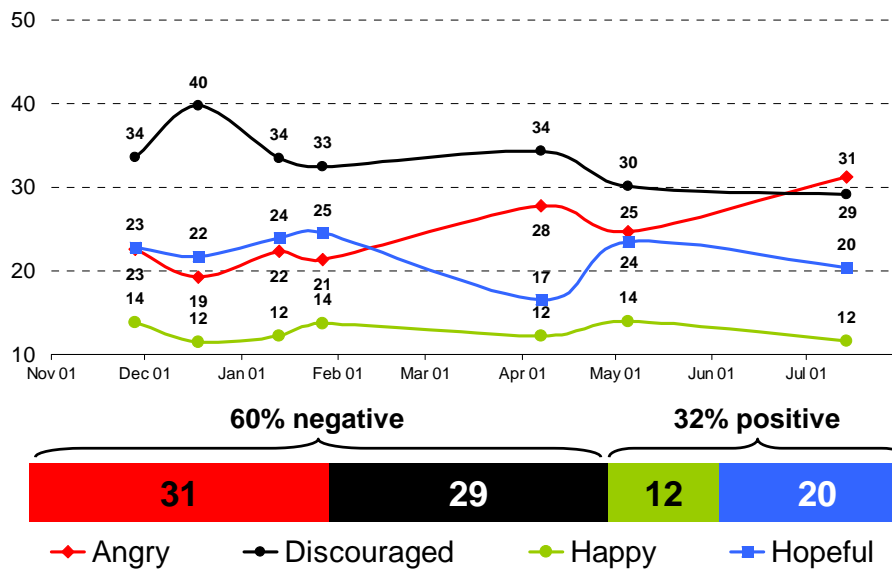
BASE: Canadians (half-sample); July 8-14, 2015 (n=1,279), MOE +/- 2.7%, 19 times out of 20

Harper – Grr! Mulcair and Trudeau – there’s a difference?

Our tracking on emotional engagement shows that the emotional response to Stephen Harper is largely very negative with a clear growth in the incidence of those who feel “angry” about him. Both Thomas Mulcair and Justin Trudeau, meanwhile, have much more positive connections. Normally, one would conclude that this is good news for the two progressive parties. However, our findings suggest that Mr. Mulcair and Mr. Trudeau are largely seen in similar terms, which raises the possibility that both leaders are largely seen as substitutable. These results underline the similarities of the constituencies the two parties are trying to attract – in effect, they are fishing from the same pool.

Emotional response to Stephen Harper

Q. When thinking about Stephen Harper, which of the following emotions best describes how you feel?

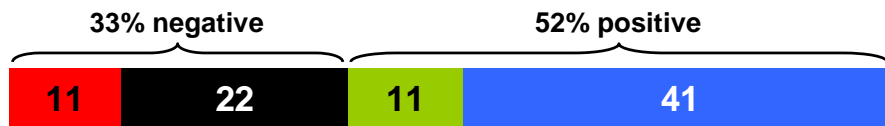
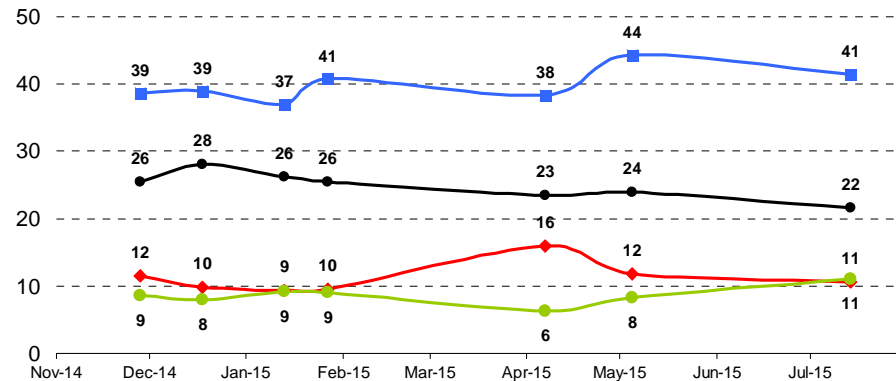


Copyright 2015
No reproduction without permission

BASE: Canadians (third-sample); July 8-14, 2015 (n=818), MOE +/- 3.4%, 19 times out of 20

Emotional response to Thomas Mulcair

Q. When thinking about Thomas Mulcair, which of the following emotions best describes how you feel?



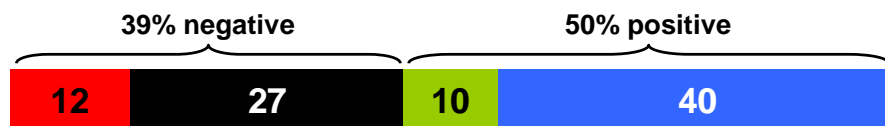
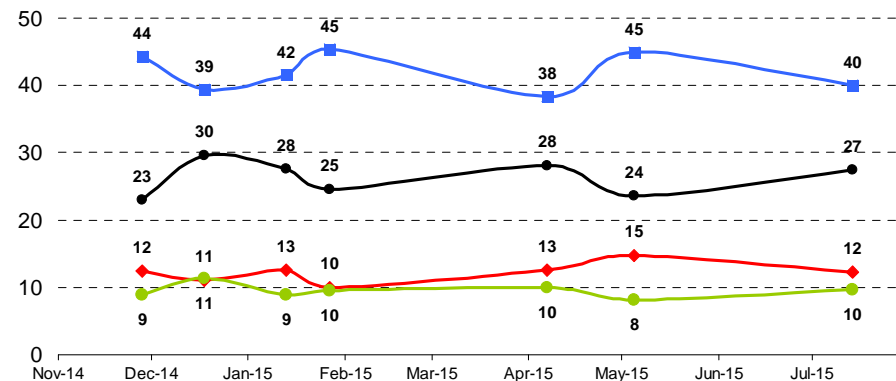
◆ Angry
 ● Discouraged
 ◆ Happy
 ■ Hopeful

Copyright 2015
No reproduction without permission

BASE: Canadians (third-sample); July 8-14, 2015 (n=852), MOE +/- 3.4%, 19 times out of 20

Emotional response to Justin Trudeau

Q. When thinking about Justin Trudeau, which of the following emotions best describes how you feel?



◆ Angry
 ● Discouraged
 ◆ Happy
 ■ Hopeful

Copyright 2015
No reproduction without permission

BASE: Canadians (third-sample); July 8-14, 2015 (n=868), MOE +/- 3.3%, 19 times out of 20

Concluding remarks

Overall, it appears that no party is in a position to form a stable government. All things considered, the NDP is in the best shape and they have led for six straight weeks. Their leader scores well across the board and they have ample room for growth in terms of second choice.³ For those who say the NDP fortunes are just a temporary Notley honeymoon effect, we would point out that that the rise started back in February, long before the Alberta election. Rather, the NDP's success is due more to its dominance in Quebec, its popularity with the labour movement,⁴ and its success in unifying the educated and progressive votes.

Right now, the threats to the NDP are two-fold. First, the "promiscuous progressive" voters who have turned their way could return to the Liberals and this swing group has been moving back and forth for over four years. Second, the added scrutiny of being under the magnifying glass of the front runner heightens the challenge and one would speculate that the full force of the Conservative negative framing machinery will turn its focus from Mr. Trudeau to Mr. Mulcair.

The Conservative Party has the most treacherous path to victory. Their meagre second choice standing leaves them with scant opportunities for growth. Directional and economic indicators are lousy and the party's leader has by far the poorest approval ratings.⁵ Furthermore, simply "winning" is not sufficient – they will need another majority or, at the very least, a strong minority to have any shelf life, especially in light of how Canadians are warming to the idea of a progressive-led coalition government.⁶ And yet, we see the party hanging on, not that far back from where they were in the lead-up to the 2011 election. It appears their new ads have granted them a significant uptick and, in the absence of an economic case, the party is going to have to look to security and culture to resuscitate its fortunes, as this appears to be the only place where they can grow their support.

The Liberals are still very much in the race and have some significant cards yet to play. They have a largely popular leader who produces a lot of hope. Their key problem is that some voters see both the leader and the party as largely substitutable with the NDP and, for whatever reasons, those voters are leaning Mulcair's way somewhat. While it must be discouraging for the party to see how quickly the gains from their high profile platform launches can dissipate in the attention deficit disorder voting public, the key to victory lies through proving to Canadians that they – and not the NDP – are the clear alternative to Steven Harper.

³ EKOS Research Associates, "Race Tightens to Three-Way Race Again as NDP Slips", June 19, 2015. Available online at: <http://goo.gl/zMXFBW>

⁴ EKOS Research Associates, "A New Normal", May 22, 2015. Available online at: <http://goo.gl/V38Z69>

⁵ EKOS Research Associates, "Race Tightens to Three-Way Race Again as NDP Slips", June 19, 2015. Available online at: <http://goo.gl/zMXFBW>

⁶ EKOS Research Associates, "Logjam Continues as Canadians Become More Receptive to Innovative Political Approaches", May 29, 2015. Available online at: <http://goo.gl/ZusyW8>

At this stage, there is no clear winner and the public answer to the election riddle might not be a single party, but a consortium of sorts, formal or informal, with relative indifference as to who should lead. We suspect this force may play itself out. In any case, there is a good chance that the ultimate victor(s) may remain elusive until October 19th.

Methodological note on the treatment of “other”

Over the past few years, we have noticed a steady increase in the proportion of respondents selecting “other” on federal vote intention. In our last poll,⁷ for instance, 3.3 per cent said they intend to vote for a party other than the Conservatives, NDP, Liberals, Greens, or Bloc. One possibility is that the unusually high incidence of “other” is due to the formation of Strength in Democracy, but this theory quickly falls apart when one considers that “other” was at just 1.6 points in Quebec, less than half the national average.

Some who have noticed this trend have also suggested that these results reflect a rise of the popularity of Canada’s “fringe” parties. However, we have noticed that in almost all of our election polling, we have consistently overestimated support for “other”. For example, in the 2014 Ontario election, we overstated “other” support by a margin of 3.9 to 1.5.⁸ In the 2011 federal election, it was 1.5 to 0.9.⁹

Rather, we believe that the high incidence of “other” is a reflection of the growing dissatisfaction that Canadians feel with any of the mainstream choices and the rise of “other” reflects those who are simply trying to say “none of the above”. One final possibility is that given the increasing substitutability of the Liberals and NDP we discussed earlier, some Canadians are selecting “other” to express a preference for “two or more of the above”, although we have experimented with various wordings and clarifying the meaning of the response categories had no discernable impact.

Whatever the cause, we know from past experience that “other” is being exaggerated by a factor of between two and four. Therefore, from now on, we will be adjusting “other” downward by one-half (and re-allocating the difference among the other parties). While this adjustment may be imperfect, we believe that it will create a more accurate picture of Canada’s political landscape.

⁷ EKOS Research Associates, “Race Narrowing Again”, July 3, 2015. Available online at: <http://goo.gl/oiTFx0>

⁸ EKOS Research Associates, “EKOS Accurately Predicts Ontario Liberal Majority”, June 13, 2014. Available online at: <http://goo.gl/u2JWNN>

⁹ EKOS Research Associates, “A Brief Post Mortem on Polling Election 41”, May 3, 2011. Available online at: <http://goo.gl/RscYEI>

Impact of adjusting “other”

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

Unadjusted results



Adjusted results










Copyright 2015
No reproduction without permission

BASE: Canadians; July 8-14, 2015 (n=2,538), MOE +/- 2.0%, 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	24.0%	29.4%	32.6%	6.6%	5.3%	2.2%	2196	2.1
REGION								
British Columbia	20.2%	27.4%	41.3%	9.1%	–	2.0%	297	5.7
Alberta	15.4%	48.5%	28.9%	3.9%	–	3.3%	258	6.1
Saskatchewan	11.7%	34.0%	45.4%	5.7%	–	3.3%	95	10.1
Manitoba	27.3%	33.1%	31.7%	6.5%	–	1.5%	91	10.3
Ontario	29.4%	33.2%	27.2%	7.9%	–	2.3%	744	3.6
Quebec	19.0%	15.4%	36.6%	5.1%	22.5%	1.4%	522	4.3
Atlantic Canada	38.1%	24.9%	31.0%	3.7%	–	2.3%	183	7.2
GENDER								
Male	24.9%	33.3%	30.8%	5.1%	4.2%	1.8%	1078	3.0
Female	23.4%	25.8%	34.3%	8.0%	6.5%	2.1%	1090	3.0
AGE								
<35	25.4%	23.6%	32.9%	8.1%	7.2%	2.8%	185	7.2
35-49	22.2%	30.5%	34.4%	7.0%	4.6%	1.3%	350	5.2
50-64	23.3%	28.9%	35.0%	5.2%	5.9%	1.7%	776	3.5
65+	25.9%	36.9%	27.2%	5.5%	2.8%	1.7%	862	3.3
EDUCATION								
High school or less	23.2%	30.2%	28.9%	8.2%	7.3%	2.1%	510	4.3
College or CEGEP	21.5%	32.6%	32.8%	6.1%	4.6%	2.4%	739	3.6
University or higher	27.5%	25.9%	35.3%	5.5%	4.5%	1.3%	921	3.2

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	40.8%	50.6%	8.6%	1232	2.8
REGION					
British Columbia	35.9%	59.3%	4.8%	165	7.6
Alberta	54.0%	32.3%	13.7%	149	8.0
Saskatchewan	41.6%	49.6%	8.8%	58	12.9
Manitoba	49.7%	40.7%	9.6%	54	13.3
Ontario	41.7%	48.8%	9.5%	401	4.9
Quebec	35.0%	56.7%	8.2%	291	5.7
Atlantic Canada	35.7%	58.8%	5.5%	108	9.4
GENDER					
Male	45.6%	51.3%	3.1%	587	4.0
Female	39.5%	55.0%	5.5%	570	4.1
AGE					
<35	35.9%	55.2%	8.9%	124	8.8
35-49	44.1%	54.7%	1.2%	196	7.0
50-64	42.5%	53.4%	4.1%	418	4.8
65+	51.5%	44.7%	3.9%	427	4.7
EDUCATION					
High school or less	45.6%	46.9%	7.5%	292	5.7
College or CEGEP	42.3%	54.4%	3.3%	372	5.1
University or higher	39.8%	56.5%	3.6%	502	4.4
CURRENT VOTE INTENTION					
Liberal Party	34.2%	64.2%	1.6%	245	6.3
Conservative Party	80.2%	17.5%	2.2%	319	5.5
NDP	26.6%	70.4%	3.0%	352	5.2
Green Party	28.8%	59.8%	11.4%	62	12.5
Bloc Québécois	17.5%	77.0%	5.5%	50	13.9

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	35.1%	57.4%	7.5%	1306	2.7
REGION					
British Columbia	26.6%	68.1%	5.4%	168	7.6
Alberta	56.2%	32.5%	11.4%	156	7.9
Saskatchewan	51.1%	39.6%	9.3%	57	13.0
Manitoba	30.7%	59.2%	10.1%	54	13.3
Ontario	33.3%	59.7%	7.0%	451	4.6
Quebec	32.8%	61.9%	5.3%	304	5.6
Atlantic Canada	30.7%	56.8%	12.5%	115	9.1
GENDER					
Male	37.9%	57.0%	5.1%	577	4.1
Female	35.4%	60.7%	3.9%	666	3.8
AGE					
<35	31.8%	62.2%	6.0%	104	9.6
35-49	32.6%	60.9%	6.5%	204	6.9
50-64	38.4%	60.0%	1.6%	446	4.6
65+	44.7%	51.5%	3.9%	491	4.4
EDUCATION					
High school or less	42.7%	52.0%	5.3%	303	5.6
College or CEGEP	39.0%	57.5%	3.5%	428	4.7
University or higher	29.3%	66.0%	4.7%	506	4.4
CURRENT VOTE INTENTION					
Liberal Party	21.7%	73.5%	4.8%	278	5.9
Conservative Party	85.9%	11.4%	2.6%	354	5.2
NDP	12.6%	85.7%	1.8%	343	5.3
Green Party	11.9%	82.6%	5.5%	57	13.0
Bloc Québécois	28.6%	69.5%	1.8%	55	13.2

Most Important Issue (Version 1)

Q. Of the following issues, which one do you think should be the most important issue for the next federal election? 1) Issues like ethics and accountability; 2) The economy, jobs, and growth; 3) Fiscal issues like taxes and debt; or 4) Social issues like health and education.

	Ethics and accountability	Economic issues	Fiscal issues	Social issues	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	9.9%	40.0%	10.6%	32.0%	7.5%	1243	2.8
REGION							
British Columbia	16.3%	36.2%	11.9%	31.9%	3.7%	161	7.7
Alberta	9.9%	46.0%	12.3%	23.5%	8.3%	143	8.2
Saskatchewan	17.2%	31.7%	7.2%	39.3%	4.5%	61	12.6
Manitoba	12.7%	40.0%	10.3%	25.4%	11.6%	52	13.6
Ontario	10.7%	43.0%	11.9%	26.7%	7.6%	403	4.9
Quebec	4.9%	38.6%	9.0%	41.8%	5.7%	313	5.5
Atlantic Canada	5.1%	32.1%	5.9%	38.2%	18.8%	107	9.5
GENDER							
Male	13.3%	46.1%	14.6%	23.5%	2.6%	574	4.1
Female	7.7%	38.5%	7.8%	42.2%	3.8%	600	4.0
AGE							
<35	12.4%	35.3%	10.8%	36.8%	4.8%	116	9.1
35-49	8.5%	40.5%	10.1%	38.5%	2.5%	198	7.0
50-64	9.3%	46.0%	12.1%	29.8%	2.9%	422	4.8
65+	11.1%	47.9%	11.2%	25.9%	3.9%	445	4.7
EDUCATION							
High school or less	10.5%	47.3%	16.1%	22.6%	3.5%	292	5.7
College or CEGEP	9.1%	45.6%	10.1%	32.3%	3.0%	404	4.9
University or higher	11.2%	34.3%	7.9%	42.5%	4.1%	478	4.5
CURRENT VOTE INTENTION							
Liberal Party	14.2%	47.6%	7.8%	29.3%	1.2%	235	6.4
Conservative Party	6.0%	58.3%	16.7%	17.9%	1.1%	337	5.3
NDP	14.6%	30.7%	9.5%	43.1%	2.1%	343	5.3
Green Party	14.0%	47.5%	4.3%	33.4%	0.8%	57	13.0
Bloc Québécois	2.6%	24.1%	3.4%	67.7%	2.2%	53	13.5

Most Important Issue (Version 2)

Q. Of the following issues, which one do you think should be the most important issue for the next federal election? 1) Restoring middle class progress; 2) Issues related to the environment and climate change; 3) Issues related to security and terrorism; or 4) Democratic renewal.

	Restoring middle class progress	The environment	Security and terrorism	Democratic renewal	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	40.8%	22.3%	15.8%	14.0%	7.2%	1295	2.7
REGION							
British Columbia	35.1%	33.9%	9.3%	14.3%	7.4%	172	7.5
Alberta	39.8%	19.6%	15.4%	12.2%	12.9%	162	7.7
Saskatchewan	22.8%	24.0%	17.7%	26.6%	8.9%	54	13.3
Manitoba	35.5%	18.8%	20.6%	16.2%	8.8%	56	13.1
Ontario	40.0%	18.2%	19.7%	16.6%	5.5%	449	4.6
Quebec	48.4%	26.2%	10.4%	9.4%	5.7%	282	5.8
Atlantic Canada	43.0%	14.1%	21.2%	11.3%	10.5%	116	9.1
GENDER							
Male	42.9%	20.3%	15.3%	19.4%	2.1%	590	4.0
Female	42.6%	26.0%	17.4%	9.6%	4.4%	636	3.9
AGE							
<35	42.6%	24.6%	14.2%	17.4%	1.2%	112	9.3
35-49	45.4%	20.5%	17.2%	13.6%	3.3%	202	6.9
50-64	46.6%	23.3%	15.1%	11.2%	3.8%	442	4.7
65+	31.9%	25.1%	20.7%	16.9%	5.4%	473	4.5
EDUCATION							
High school or less	44.5%	15.0%	22.8%	13.5%	4.3%	303	5.6
College or CEGEP	45.2%	19.1%	19.6%	13.7%	2.4%	396	4.9
University or higher	39.3%	32.5%	8.8%	15.9%	3.6%	530	4.3
CURRENT VOTE INTENTION							
Liberal Party	53.1%	21.5%	11.7%	12.3%	1.5%	288	5.8
Conservative Party	43.8%	11.1%	31.4%	12.0%	1.7%	336	5.4
NDP	37.7%	30.1%	10.0%	20.4%	1.9%	352	5.2
Green Party	12.3%	55.6%	11.0%	18.8%	2.3%	62	12.5
Bloc Québécois	63.5%	15.9%	12.0%	4.2%	4.4%	52	13.6

Emotional Response to Stephen Harper

Q. [THIRD-SAMPLE ONLY] When thinking about Stephen Harper, which of the following emotions best describes how you feel?

	Angry	Discouraged	Happy	Hopeful	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	31.2%	29.1%	11.6%	20.4%	7.8%	818	3.4
REGION							
British Columbia	50.3%	21.6%	7.2%	14.1%	6.7%	114	9.2
Alberta	17.0%	28.5%	20.5%	23.7%	10.3%	87	10.5
Saskatchewan	40.6%	7.7%	19.8%	20.4%	11.5%	30	17.9
Manitoba	13.2%	38.6%	5.8%	34.1%	8.3%	33	17.1
Ontario	36.0%	24.0%	15.1%	21.4%	3.5%	284	5.8
Quebec	21.1%	41.7%	4.6%	22.4%	10.3%	204	6.9
Atlantic Canada	28.4%	30.3%	13.9%	6.0%	21.4%	64	12.3
GENDER							
Male	31.2%	29.0%	14.6%	21.7%	3.5%	389	5.0
Female	33.9%	31.3%	9.8%	21.4%	3.5%	381	5.0
AGE							
<35	43.5%	28.7%	9.3%	12.9%	5.6%	65	12.2
35-49	25.8%	35.5%	11.7%	23.7%	3.3%	122	8.9
50-64	32.9%	30.1%	11.5%	22.4%	3.1%	271	6.0
65+	27.0%	26.4%	17.5%	27.4%	1.7%	317	5.5
EDUCATION							
High school or less	26.7%	28.2%	16.5%	26.1%	2.4%	180	7.3
College or CEGEP	35.5%	29.9%	13.0%	18.0%	3.6%	265	6.0
University or higher	34.4%	32.5%	8.2%	21.8%	3.1%	322	5.5
CURRENT VOTE INTENTION							
Liberal Party	40.3%	38.5%	5.5%	12.5%	3.1%	152	8.0
Conservative Party	4.5%	6.0%	36.4%	51.0%	2.0%	201	6.9
NDP	52.1%	36.1%	1.0%	9.5%	1.4%	231	6.5
Green Party	55.0%	25.6%	11.8%	6.3%	1.4%	40	15.5
Bloc Québécois	21.0%	60.1%	0.0%	15.5%	3.4%	47	14.3

Emotional Response to Thomas Mulcair

Q. [THIRD-SAMPLE ONLY] When thinking about Thomas Mulcair, which of the following emotions best describes how you feel?

	Angry	Discouraged	Happy	Hopeful	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	10.6%	21.7%	11.0%	41.4%	15.4%	852	3.4
REGION							
British Columbia	8.1%	27.1%	13.6%	44.9%	6.2%	103	9.7
Alberta	16.9%	29.2%	11.3%	24.9%	17.8%	116	9.1
Saskatchewan	14.5%	14.0%	1.0%	43.6%	27.0%	38	15.9
Manitoba	14.8%	10.7%	5.9%	51.1%	17.5%	38	15.9
Ontario	12.1%	20.6%	11.1%	36.6%	19.7%	288	5.8
Quebec	6.8%	20.6%	12.9%	50.6%	9.1%	182	7.3
Atlantic Canada	5.3%	18.9%	8.6%	51.4%	15.8%	85	10.6
GENDER							
Male	13.3%	25.5%	12.5%	40.7%	8.0%	379	5.0
Female	9.0%	19.7%	10.8%	45.7%	14.8%	428	4.7
AGE							
<35	5.2%	25.3%	14.4%	38.8%	16.3%	88	10.5
35-49	10.3%	23.9%	9.7%	48.0%	8.0%	132	8.5
50-64	15.7%	20.3%	11.3%	42.5%	10.3%	293	5.7
65+	14.7%	19.6%	10.2%	45.8%	9.7%	292	5.7
EDUCATION							
High school or less	8.3%	28.1%	14.2%	38.0%	11.5%	206	6.8
College or CEGEP	16.4%	24.6%	8.6%	39.4%	11.0%	256	6.1
University or higher	8.6%	15.9%	11.5%	51.5%	12.4%	345	5.3
CURRENT VOTE INTENTION							
Liberal Party	7.4%	26.6%	19.6%	36.2%	10.2%	174	7.4
Conservative Party	23.2%	38.2%	9.1%	21.4%	8.1%	247	6.2
NDP	2.8%	1.8%	11.9%	81.9%	1.5%	218	6.6
Green Party	0.0%	29.8%	7.5%	42.1%	20.5%	41	15.3
Bloc Québécois	8.1%	27.0%	14.7%	45.1%	5.1%	27	18.9

Emotional Response to Justin Trudeau

Q. [THIRD-SAMPLE ONLY] When thinking about Justin Trudeau, which of the following emotions best describes how you feel?

	Angry	Discouraged	Happy	Hopeful	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	12.2%	27.4%	9.6%	40.1%	10.7%	868	3.3
REGION							
British Columbia	9.3%	23.9%	13.3%	44.0%	9.5%	116	9.1
Alberta	21.7%	25.5%	10.6%	26.6%	15.7%	102	9.7
Saskatchewan	14.5%	30.4%	7.6%	36.5%	11.1%	47	14.3
Manitoba	3.4%	28.7%	14.8%	44.3%	8.9%	37	16.1
Ontario	15.6%	23.8%	8.7%	43.2%	8.7%	280	5.9
Quebec	5.5%	38.0%	9.1%	35.0%	12.4%	209	6.8
Atlantic Canada	15.0%	15.6%	6.7%	52.0%	10.7%	74	11.4
GENDER							
Male	12.3%	31.5%	10.0%	41.3%	4.9%	396	4.9
Female	12.9%	25.6%	10.3%	42.0%	9.3%	427	4.7
AGE							
<35	15.2%	29.6%	10.5%	35.4%	9.4%	75	11.3
35-49	10.8%	33.0%	11.6%	36.6%	8.0%	146	8.1
50-64	11.2%	29.1%	8.0%	48.7%	2.9%	300	5.7
65+	13.8%	17.8%	9.8%	48.8%	9.8%	309	5.6
EDUCATION							
High school or less	16.1%	31.3%	10.3%	37.2%	5.1%	209	6.8
College or CEGEP	9.9%	29.1%	9.4%	41.5%	10.1%	279	5.9
University or higher	11.8%	25.2%	10.5%	45.3%	7.3%	341	5.3
CURRENT VOTE INTENTION							
Liberal Party	4.4%	4.9%	16.0%	72.9%	1.8%	197	7.0
Conservative Party	28.8%	45.5%	3.6%	17.7%	4.5%	225	6.5
NDP	6.2%	32.6%	11.7%	43.7%	5.7%	246	6.3
Green Party	26.6%	13.6%	6.2%	42.2%	11.4%	38	15.9
Bloc Québécois	4.2%	40.7%	12.9%	27.1%	15.0%	31	17.6

Public Attention to Conservative Advertising

Q. [Third-sample only] There are number of issues of the day that Canadians are following. Paid advertising by the Conservative Party for the next election

	Not at all	Somewhat closely	Very closely	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	48.9%	29.8%	15.1%	6.2%	899	3.3
REGION						
British Columbia	48.9%	37.0%	9.7%	4.5%	102	9.7
Alberta	38.6%	36.7%	17.9%	6.8%	112	9.3
Saskatchewan	51.3%	35.6%	4.8%	8.3%	33	17.1
Manitoba	41.0%	31.5%	22.0%	5.5%	46	14.5
Ontario	44.7%	30.4%	18.1%	6.8%	315	5.5
Quebec	62.2%	19.6%	12.6%	5.5%	207	6.8
Atlantic Canada	50.3%	31.3%	11.5%	6.9%	83	10.8
GENDER						
Male	54.9%	29.1%	15.3%	0.7%	419	4.8
Female	46.7%	33.0%	16.1%	4.2%	438	4.7
AGE						
<35	55.3%	27.8%	13.7%	3.3%	74	11.4
35-49	48.8%	32.0%	15.7%	3.5%	144	8.2
50-64	52.7%	31.0%	13.7%	2.6%	306	5.6
65+	44.2%	33.2%	20.8%	1.8%	335	5.4
EDUCATION						
High school or less	54.2%	29.3%	13.0%	3.5%	226	6.5
College or CEGEP	48.0%	32.4%	15.3%	4.3%	293	5.7
University or higher	49.5%	31.2%	17.9%	1.4%	334	5.4
CURRENT VOTE INTENTION						
Liberal Party	47.4%	25.5%	22.8%	4.3%	206	6.8
Conservative Party	27.5%	49.8%	20.7%	2.0%	241	6.3
NDP	60.1%	27.7%	11.5%	0.7%	232	6.4
Green Party	72.2%	19.8%	4.1%	3.9%	42	15.1
Bloc Québécois	60.1%	29.9%	10.0%	0.0%	32	17.3

Public Attention to Announcements by Justin Trudeau

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? Speeches/Announcements by Justin Trudeau

	Not at all	Somewhat closely	Very closely	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	43.5%	38.4%	10.9%	7.2%	1259	2.8
REGION						
British Columbia	44.9%	34.7%	15.1%	5.4%	157	7.8
Alberta	40.8%	43.2%	7.0%	8.9%	148	8.1
Saskatchewan	36.4%	38.6%	11.4%	13.5%	57	13.0
Manitoba	55.1%	29.1%	5.4%	10.4%	58	12.9
Ontario	44.0%	39.6%	10.1%	6.4%	423	4.8
Quebec	45.1%	38.3%	11.5%	5.2%	301	5.7
Atlantic Canada	36.1%	35.5%	15.2%	13.2%	113	9.2
GENDER						
Male	49.5%	38.6%	10.4%	1.4%	561	4.1
Female	42.1%	41.6%	12.1%	4.3%	631	3.9
AGE						
<35	49.8%	38.2%	8.4%	3.7%	99	9.9
35-49	46.5%	42.2%	7.7%	3.5%	211	6.8
50-64	41.6%	42.4%	13.4%	2.5%	427	4.7
65+	43.5%	36.4%	18.0%	2.1%	458	4.6
EDUCATION						
High school or less	54.6%	33.4%	9.1%	3.0%	300	5.7
College or CEGEP	41.4%	41.4%	12.4%	4.7%	416	4.8
University or higher	41.5%	44.1%	12.3%	2.1%	481	4.5
CURRENT VOTE INTENTION						
Liberal Party	19.7%	48.2%	27.7%	4.5%	262	6.1
Conservative Party	66.5%	27.7%	4.9%	0.9%	334	5.4
NDP	39.0%	50.3%	8.2%	2.4%	329	5.4
Green Party	53.4%	30.8%	11.1%	4.7%	62	12.5
Bloc Québécois	42.6%	45.7%	7.7%	4.0%	58	12.9

Public Attention to Announcements by Thomas Mulcair

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? Speeches/Announcements by Thomas Mulcair

	Not at all	Somewhat closely	Very closely	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	43.6%	34.9%	14.1%	7.4%	1279	2.7
REGION						
British Columbia	42.4%	33.6%	17.2%	6.8%	176	7.4
Alberta	46.6%	29.4%	12.7%	11.2%	157	7.8
Saskatchewan	53.7%	31.8%	10.1%	4.4%	58	12.9
Manitoba	37.8%	23.9%	30.9%	7.4%	50	13.9
Ontario	44.4%	37.5%	12.4%	5.7%	429	4.7
Quebec	43.2%	34.1%	15.0%	7.7%	294	5.7
Atlantic Canada	38.2%	37.0%	10.7%	14.0%	110	9.3
GENDER						
Male	43.9%	36.7%	15.6%	3.8%	603	4.0
Female	46.4%	36.5%	13.8%	3.3%	605	4.0
AGE						
<35	49.8%	30.0%	12.5%	7.7%	129	8.6
35-49	46.8%	37.0%	14.9%	1.3%	189	7.1
50-64	38.9%	42.9%	16.3%	1.8%	437	4.7
65+	44.7%	36.3%	15.6%	3.4%	460	4.6
EDUCATION						
High school or less	57.3%	28.6%	10.3%	3.8%	295	5.7
College or CEGEP	45.7%	35.6%	15.0%	3.7%	384	5.0
University or higher	34.3%	43.6%	17.6%	4.4%	527	4.3
CURRENT VOTE INTENTION						
Liberal Party	45.6%	44.5%	7.8%	2.1%	261	6.1
Conservative Party	69.5%	25.9%	3.8%	0.9%	339	5.3
NDP	19.7%	48.2%	31.0%	1.2%	366	5.1
Green Party	49.4%	37.3%	13.3%	0.0%	57	13.0
Bloc Québécois	51.1%	20.8%	24.3%	3.8%	47	14.3

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 July 8-14, 2015. In total, a random sample of 2,538 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, region, and educational attainment** to ensure the sample's composition reflects that of the actual population of Canada according to Census data.