

## LATEST HIGHLIGHTS

### Liberals ahead by eight: 38% to 30% Economic mood positive, BQ sliding

By Bruce Anderson & David Coletto

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Our most recent polls show that the Liberals continue to enjoy a significant lead over the Conservatives with the NDP in third. Among the trends we are watching is the drift downward in expressed support for the BQ. The BQ now is the choice of only 13% of Quebec voters in our latest sample, down sharply from the 28% we saw in March of this year.

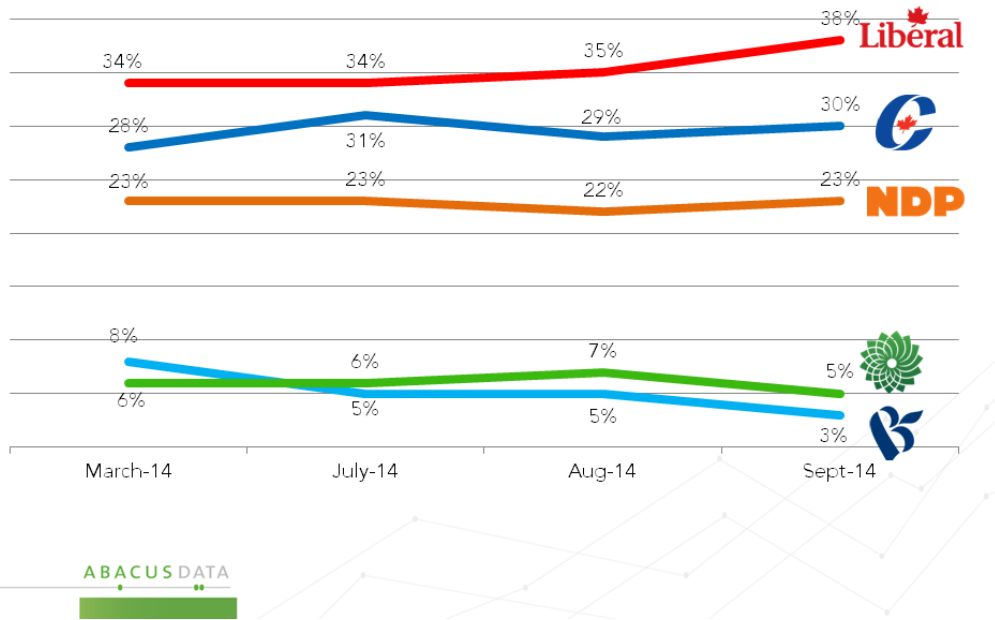
#### Voting Intentions (change from August 2014)

Party	All Respondents (n=1,075)	Committed Voters (n=889)
Liberal	31% (+4)	38% (+3)
Conservative	24% (+1)	30% (+1)
NDP	19% (+2)	23% (+1)
Green	4% (-2)	5% (-2)
BQ	3% (-1)	3% (-2)
Other	1% (-1)	1% (-1)
Undecided	19% (-3)	-

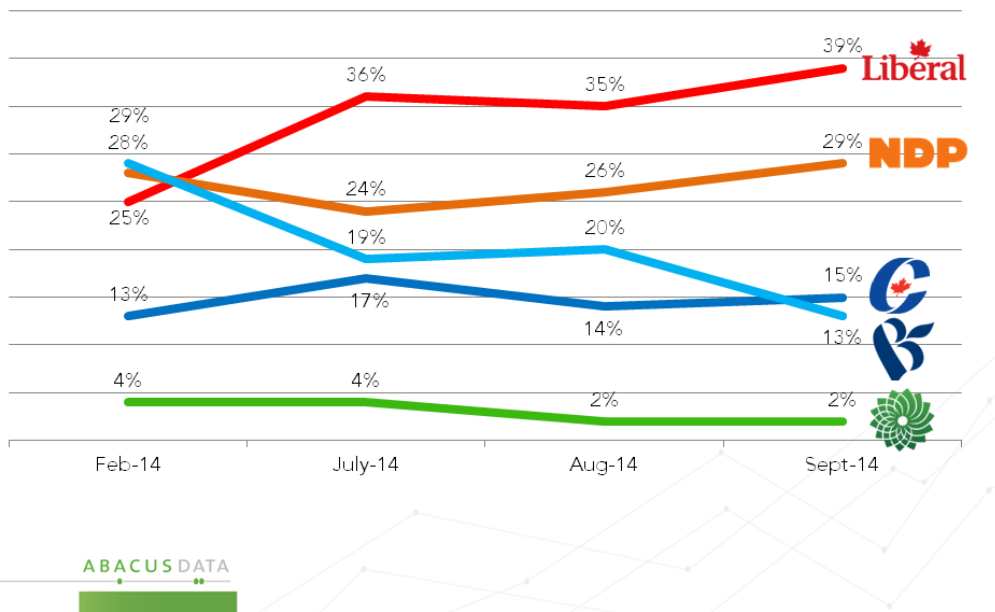
#### Committed Voters

Party	Canada (n=889)	BC (n=102)	AB (n=88)	SK/MB (n=78)	ON (n=325)	QC (n=210)	Atlantic (n=86)
Liberal	38%	32%	23%	23%	42%	39%	53%
Conservative	30%	31%	53%	46%	32%	15%	18%
NDP	23%	26%	18%	27%	19%	29%	24%
Green	5%	11%	3%	2%	6%	2%	3%
BQ	3%	-	-	-	-	13%	-
Comparable MoE	3.1%	9.9%	10.6%	11.3%	5.5%	6.9%	10.7%

## Canada – Trend Line

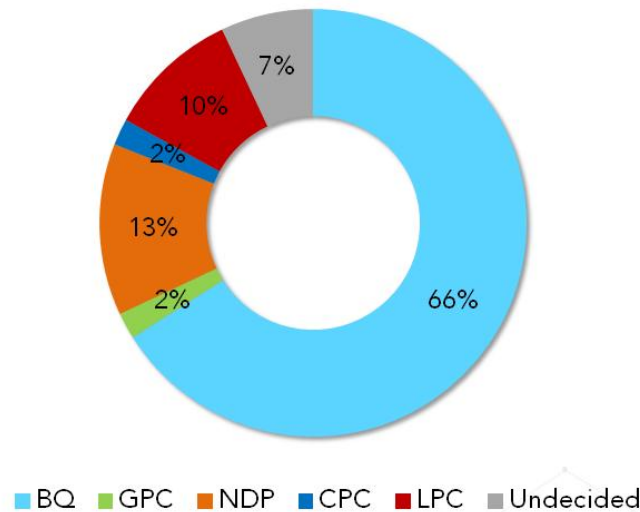


## Quebec – Trend Line



We've looked back over several months' data to examine where the 2011 BQ vote is going. The patterns show that the NDP is getting the largest share, but the Liberal Party is also getting a sizeable share. Also, in our latest Quebec results, the Liberals show a 10-point lead over the NDP, suggesting that their success at drawing disaffected BQ voters may be increasing over time.

## Where is the BQ vote going?



N=265 respondents who voted BQ in 2011  
March to September 2014

### The Economy

A majority of Canadians describe the state of the economy in positive terms today (5% very good, 56% good). And only 16% expect the economy to worsen over the next 6 months. Relatively speaking this is a pretty good mood.

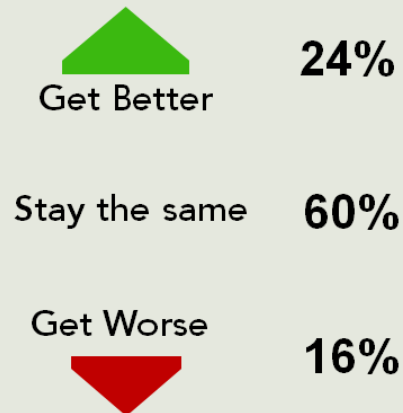
Perceptions of the economy are definitely linked to intentions to vote for the incumbent Conservative Party, however, the relationship is not as robust as Conservative election planners might hope. Among those who say the economy is in very good shape, the Conservatives have a 31-point lead, but this is a small slice of the population. Among the much larger segment who characterize the economy as "good" the Liberals (39%) and Conservatives (38%) are essentially tied. Among those who think the economy is in poor health, Conservative support is quite limited.

## Perceptions about the Economy

How would you rate the current state of the economy in Canada?







In the next 6 months, will the Canadian economy....



September 2014, n=1,075 respondents

## Current Economic Perceptions and the Vote

	Very good (n=47)	Good (n=492)	Poor (n=294)	Very poor (n=32)
	57%	38%	14%	6%
	26%	39%	36%	41%
	9%	18%	33%	38%
	6%	3%	9%	3%

September 2014, n=889 committed voters

## The Upshot

Across the country, results show the Conservatives continue to trail the Liberals by a significant margin, including in the province of Ontario. The situation in Quebec appears to be in some flux, as the BQ support ebbs, partly to the NDP but also to the benefit of the Liberals.

Feelings about the economy are broadly, if a bit unenthusiastically, positive.

For the Conservatives to count on economic credentials as a winning condition in next year's election, they would want to see growth in the number of people who see the economy as in "very good" shape, or to convince more of those who say the economy is in "good" shape that the CPC is instrumental to their economic well being.

The NDP is much more competitive among those who see the economy as suffering. They could become more competitive nationally either if the mood about the economy deteriorates or if they can persuade more voters who think the economy is "good" that they would be a good choice to maintain a healthy economy.

## Methodology

Our survey was conducted online with 1,075 respondents, September 12 to 14, 2014. A random sample of panelists was invited to complete the survey from a large representative panel of Canadians, recruited and managed by Research Now, one of the world's leading provider of online research samples.

The Marketing Research and Intelligence Association policy limits statements about margins of sampling error for most online surveys. The margin of error for a comparable probability-based random sample of the same size is +/- 3.1%, 19 times out of 20. The data were weighted according to census data to ensure that the sample matched Canada's population according to age, gender, educational attainment, and region. Totals may not add up to 100 due to rounding.

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If a federal election was held tomorrow, which one of the following parties would you vote for in your constituency?

Sample size: 1,075

Comparable MoE: ± 3.1%, 19 times out of 20

Fields dates: September 12-14, 2014

		CPC	LPC	NDP	GPC	BQ	Other	UND	Raw	Weighted
	<b>Canada</b>	<b>24%</b>	<b>31%</b>	<b>19%</b>	<b>4%</b>	<b>3%</b>	<b>1%</b>	<b>19%</b>	<b>1075</b>	<b>1060</b>
<b>Region</b>	BC	24%	25%	20%	9%	0%	0%	22%	130	141
	AB	41%	18%	14%	2%	0%	3%	23%	110	111
	MB/SK	35%	18%	21%	2%	0%	1%	24%	100	73
	ON	27%	35%	16%	5%	0%	1%	16%	380	409
	QC	13%	32%	24%	2%	11%	1%	17%	250	247
	Atlantic	15%	44%	20%	3%	0%	1%	17%	105	78
<b>Gender</b>	Male	27%	33%	16%	3%	3%	1%	16%	550	508
	Female	22%	28%	21%	5%	2%	1%	21%	525	552
<b>Age</b>	18 - 29	21%	28%	23%	7%	2%	1%	17%	164	197
	30 - 44	21%	30%	23%	5%	3%	1%	16%	313	276
	45 - 59	25%	30%	17%	2%	3%	1%	23%	328	322
	60 and over	30%	34%	14%	3%	2%	0%	17%	270	265
<b>2011 Vote</b>	Conservative Party	67%	12%	3%	1%	0%	1%	16%	343	335
	Liberal Party	3%	81%	3%	3%	1%	0%	10%	252	237
	NDP	4%	16%	66%	2%	0%	0%	13%	244	235
	Green Party	0%	10%	7%	70%	0%	3%	10%	32	28
	Bloc Quebecois	0%	13%	12%	2%	68%	0%	5%	33	32
	Did not vote	10%	27%	11%	5%	2%	1%	44%	156	181

Committed voters only

Sample size: 889

Comparable MoE: ± 3.4%, 19 times out of 20

		CPC	LPC	NDP	GPC	BQ	Other	Raw	Weighted
Region	Canada	30%	38%	23%	5%	3%	1%	889	863
	BC	31%	32%	26%	11%	0%	0%	102	110
	AB	53%	23%	18%	3%	0%	4%	88	85
	MB/SK	46%	23%	27%	2%	0%	1%	78	56
	ON	32%	42%	19%	6%	0%	1%	325	342
	QC	15%	39%	29%	2%	13%	1%	210	205
	Atlantic	18%	53%	24%	3%	0%	2%	86	65
Gender	Male	32%	40%	19%	4%	3%	1%	468	426
	Female	28%	35%	27%	6%	3%	1%	421	437
Age	18 - 29	25%	34%	28%	9%	3%	1%	143	163
	30 - 44	25%	36%	27%	6%	4%	2%	263	231
	45 - 59	32%	38%	22%	2%	4%	1%	257	247
	60 and over	36%	41%	17%	4%	2%	0%	226	221
2011 Vote	Conservative Party	80%	14%	3%	1%	0%	1%	289	281
	Liberal Party	3%	90%	3%	3%	1%	0%	227	213
	NDP	4%	18%	75%	2%	0%	0%	211	205
	Green Party	0%	12%	8%	78%	0%	3%	28	25
	Bloc Quebecois	0%	14%	12%	2%	72%	0%	31	30
	Did not vote	17%	48%	20%	10%	4%	1%	95	101



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