MIDSUMMER HAZE CLOUDS VOTER OUTLOOK:

NDP LEADS AS PUBLIC GIVES LOWEST DIRECTIONAL MARKS TO THE FEDERAL GOVERNMENT IN OVER A YEAR

[Ottawa – July 31, 2015] Nothing much is clear as we complete our midsummer check-up on the state of the largely distracted voters. There are, however, some interesting developments that set the stage for what will be a much more fiercely enjoined debate which will commence with the upcoming debate on August 6th. These become even more important on the eve of what could be an early and unusually protracted campaign.

The vote intention numbers show the NDP with a clear but modest lead of 34 points, the Conservatives are at 30 points, and the Liberals are still in contact but significantly back at 23 points. The Bloc Québécois's honeymoon with their returning leader seems to be drawing to a close and the party is falling back to its pre-Duceppe levels. The Green Party has also been receding in recent weeks.
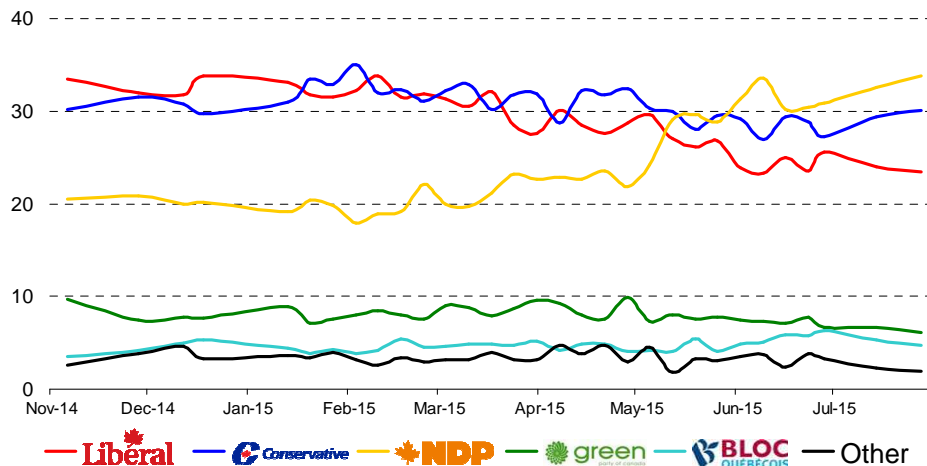
Federal vote intention

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

National Results
(Change over July 8-14 poll below)

| 23.4 -0.6 | 30.1 +0.7 | 33.8 +1.2 | 6.1 -0.5 | 4.7 -0.6 | 2 |

2011 Election Results

| 18.9 | 39.6 | 30.6 | 3.9 | 6.0 | 1 |

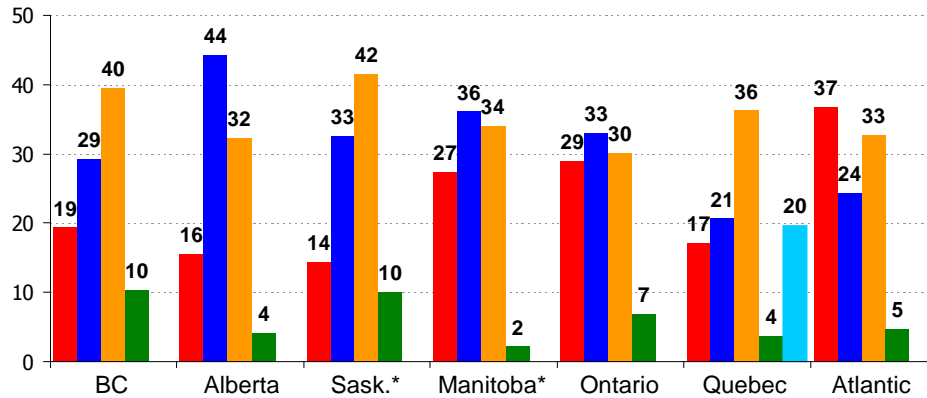Legend: — Liberal — Conservative — NDP — green — BLOC QUÉBÉCOIS — Other

Note: These figures are based on decided and leaning voters only; 7.8% of respondents say they are undecided and 7.3% are ineligible to vote / skipped the question.
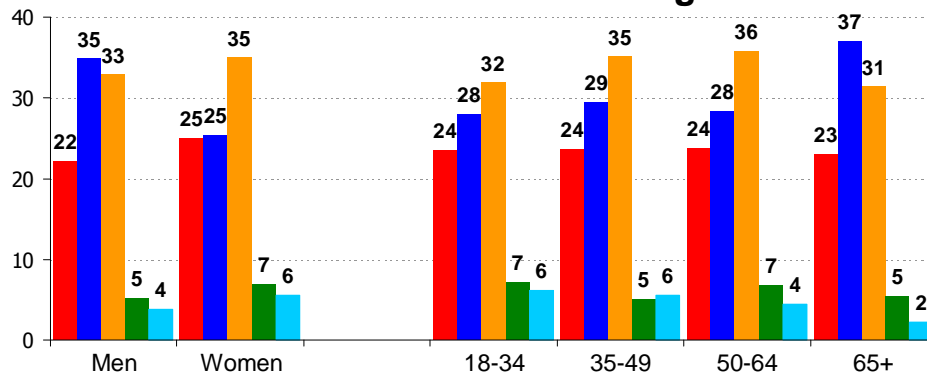
BASE: Canadians; July 22-28, 2015 (n=2,247), MOE +/- 2.1%, 19 times out of 20

Vote intention by key demographics

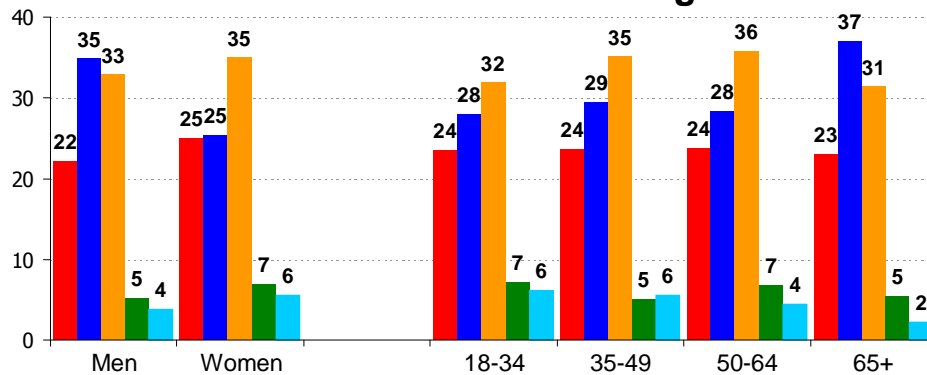*Q. If a federal election were held tomorrow, which party would you vote for?*
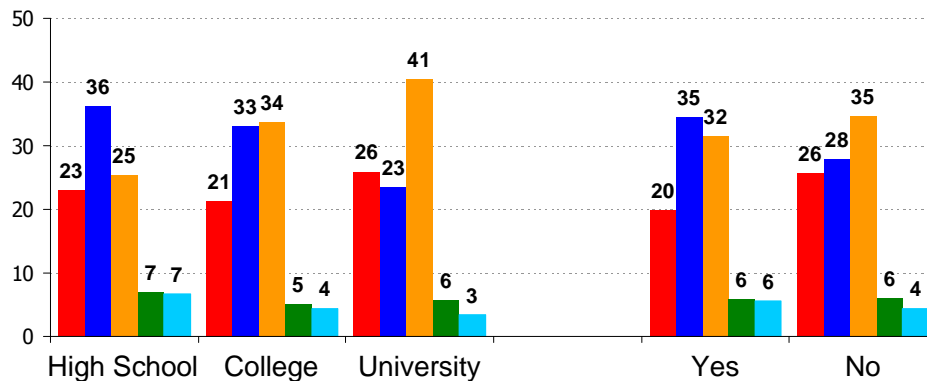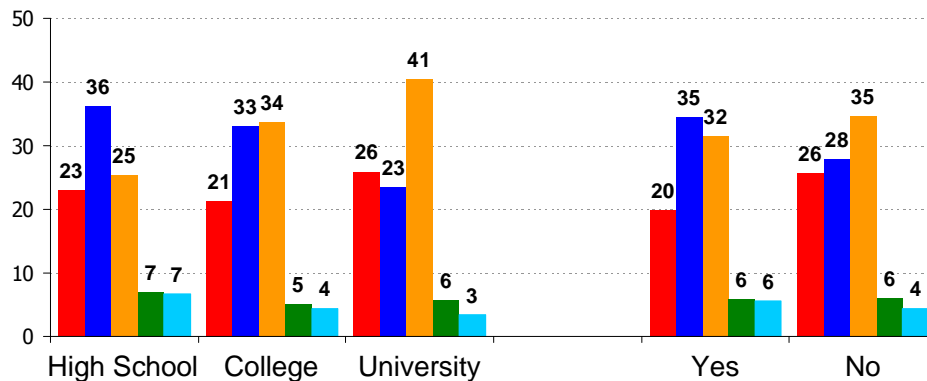

Regional chart data:

	BC	Alberta	Sask.*	Manitoba*	Ontario	Quebec	Atlantic
Liberal	19	16	14	27	29	17	37
Conservative	29	44	33	36	33	21	24
NDP	40	32	42	34	30	36	33
Green	10	4	10	2	7	4	5
Bloc						20	

Gender

	Men	Women
Liberal	22	25
Conservative	35	25
NDP	33	35
Green	5	7
Bloc	4	6

Age

	18-34	35-49	50-64	65+
Liberal	24	24	24	23
Conservative	28	29	28	37
NDP	32	35	36	31
Green	7	5	7	5
Bloc	6	6	4	2

Education

	High School	College	University
Liberal	23	21	26
Conservative	36	33	23
NDP	25	34	41
Green	7	5	6
Bloc	7	4	3

Children in home?

	Yes	No
Liberal	20	26
Conservative	35	28
NDP	32	35
Green	6	6
Bloc	6	4

Liberal	Conservative	NDP	green	Bloc	Other
23.4	30.1	33.8	6.1	4.72	

*Results for Saskatchewan/Manitoba should be interpreted with caution due to small sample sizes

BASE: Canadians; July 22-28, 2015 (n=2,247), MOE +/- 2.1%, 19 times out of 20

In Ontario, all three parties seem to be converging into a tie. The NDP are doing quite well in Saskatchewan and although this finding should be interpreted with caution due to the extremely small sample size in the province, the longer-term trends suggest that the party has indeed gained ground here in recent months. The Liberals have clearly lost their lead with the university educated, but our data on second choice suggests that the party is still very much in contention with this group.

What, if anything, is percolating under the political surface to produce these numbers? Let's consider the three front runners in turn.

The NDP – clearly leading, but can they win a two-way race against the Conservatives?

What's not to like if you are Thomas Mulcair and the NDP? You have risen from political obscurity at the beginning of the year to clear leadership. Your leader has a clear approval advantage over the other contenders. The public are increasingly seeing you as the agent of change and you have a pretty balanced regional and demographic constituency.

The key challenges for the NDP are threefold. First, hang on to those promiscuous progressive voters who have been slowly oscillating back and forth from Liberal to NDP (and back) since 2011. Second, withstand the added critical attention that comes with being the frontrunner. Finally, convince voters that they really should consider the NDP as a better bet to another Harper government.

This last challenge rises as the Liberals continue to be in third place. It may also be the case that the apparent irrationality and stubbornness of the Conservative Party to relax their unremitting focus on Justin Trudeau as 'not ready', marginally competent, and lacking judgment isn't based on lousy polling or mere spite for all things Trudeau and Liberal. The true motive may have been to hobble the previously front running Trudeau so badly that the ballot question shifts from 'Do you want some as yet unknown mixture of NDP and LPC to replace Harper?' to 'Do you prefer the NDP to the Conservatives?'.

This latter consideration may be why the issue of a coalition and related alternative political arrangements running the gamut from ad hoc co-operation to a full merger will be part of the debate as the election looms. Our newest data on the public's attitudes to the 'c-word' reveals why the Conservatives may want to spike that possibility by retaining focus on a party which is now 10 points back of the party which now leads the parade. In short, it appears that for the vast majority of center-left voters, the ultimate goal is not the singular success of their first choice, but the larger goal of ending the Harper regime and replacing it with a progressive alternative. Voters may even be more comfortable with some blended progressive solution than with having either the NDP or Liberals run things on their own.

Support for Trudeau-led coalition

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made up of Liberals and New Democrats and led by Liberal leader Justin Trudeau*, which would you prefer?

Coalition government   **Conservative government**
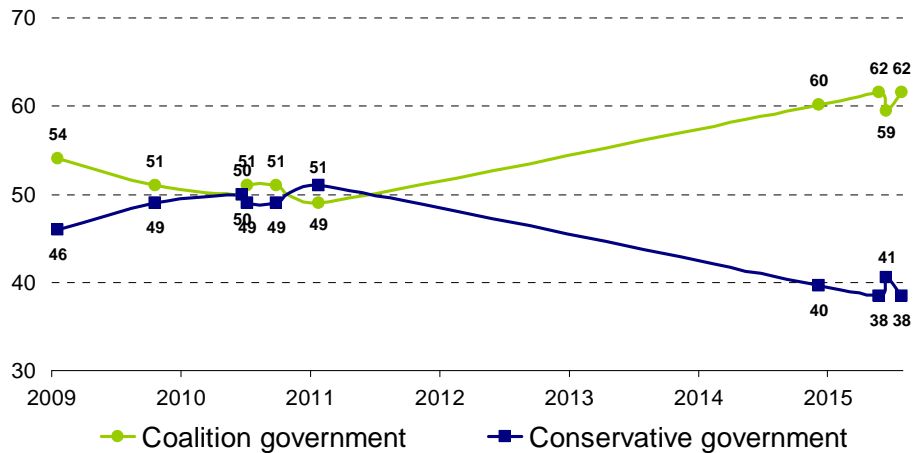
Note: Figures adjusted to exclude those who did not provide a valid response.

*Prior to the 2011 federal election, respondents were asked about a coalition government led by then-Liberal leader Michael Ignatieff.

BASE: Canadians (half-sample); July 22-28, 2015 (n=988), MOE +/- 3.1%, 19 times out of 20

Support for Mulcair-led coalition

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made of up New Democrats and Liberals and led by NDP leader Thomas Mulcair, which would you prefer?

Coalition government   **Conservative government**
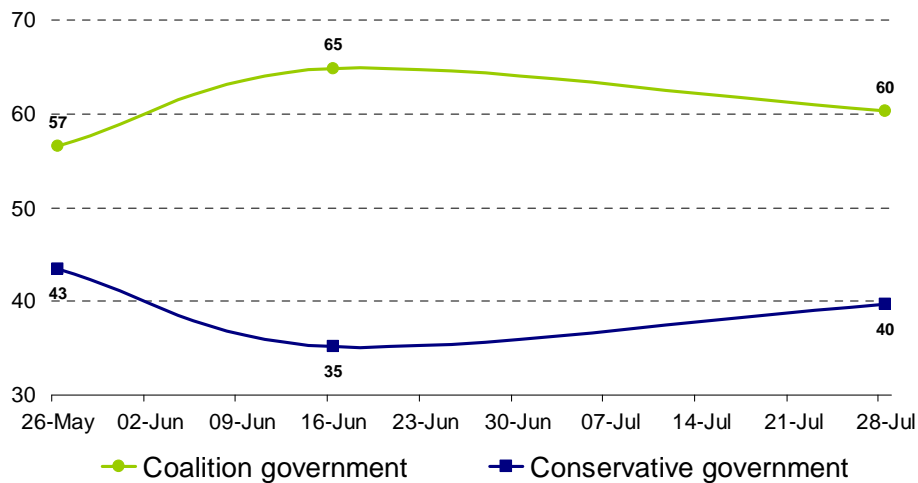
Note: Figures adjusted to exclude those who skipped the question

BASE: Canadians (half-sample); July 22-28, 2015 (n=993), MOE +/- 3.1%, 19 times out of 20

Consider the following rather striking facts. First, support for any form of progressive coalition is up dramatically from 2011 when it was used as a bogeyman to tout the need for a strong, stable majority (to fend off the horror of an NDP-led coalition). This time out, the voters aren't buying that. The next finding is that for the vast majority of the NDP and Liberal voters would prefer a coalition of the NDP and Liberals to a continued Conservative minority government. Instructively, these same voters are relatively indifferent as to whether that coalition would be led by Thomas Mulcair or Justin Trudeau. The real goal is Stephen Harper's exit; the relative success of their favoured parties is job two.

Support for coalition by party support

Trudeau-led coalition

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made up of Liberals and New Democrats and led by Liberal leader Justin Trudeau, which would you prefer?

Party	Conservative government	Coalition government	DK/NR
Liberal	11	87	3
NDP	17	79	4

Mulcair-led coalition

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made of up New Democrats and Liberals and led by NDP leader Thomas Mulcair, which would you prefer?

Party	Conservative government	Coalition government	DK/NR
Liberal	26	69	6
NDP	6	92	2

■ Conservative government   ■ Coalition government   □ DK/NR

BASE: Canadians (half-sample); July 22-28, 2015 (n=988/993), MOE +/- 3.1%, 19 times out of 20

This brings us to the status and prospects for the Liberal Party. They have certainly been humbled vis-à-vis their lofty position of a year ago and they are having trouble getting their ideas connecting with a currently inattentive electorate. They may have chosen the wrong positions on some tough issues in the past and they may have been damaged by the relentless Conservative attack ads. They still, however, have some strong assets and can get back in the game. If we read our data correctly, a precondition for recovery would be to acknowledge the gap between their hard line against a coalition (co-operation) and the preferences of their current and available voters.

From our more detailed analysis of micro-regions and specific ridings, there are many ridings where the majority of progressive voters would alter their first progressive choice to support the progressive choice better poised to beat the Conservative candidate. Just as we have seen a rise in support for coalitions (which may be a proxy for cross party cooperation to oust the

Conservatives), we have seen majority support for strategic voting amongst the majority that want to see a change of government.[1] Given the current positioning of the parties – as well as the vote splitting scenarios in play (particularly in Ontario), we would argue that a well-developed, credible strategic voting program could be the difference between Conservative success and failure.

And how about those Conservative prospects? First off, the Conservatives have a number of profound obstacles to continued electoral success. In addition to the inevitable regime fatigue that eventually afflicts any incumbent, they are seeing some of the worst ever scores on direction of the federal government, while their leader's approval ratings and emotional connections[2] are lousy and headed downward. On top of this, they have an economy that 76 per cent now see as in a recession and have an even gloomier outlook on the longer term future.

Direction of government (adjusted*)

Q. *All things considered, would you say the country is moving in the right direction or the wrong direction?*
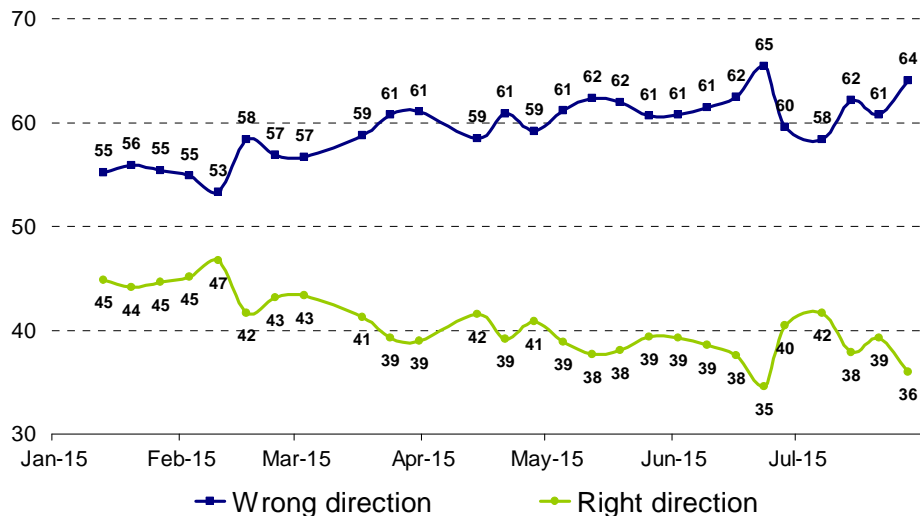
Figures adjusted to exclude those who skipped the question.

Copyright 2015
No reproduction without permission   **BASE:** Canadians (half-sample); July 22-28, 2015 (n=1,187), MOE +/- 2.8%, 19 times out of 20

The collective angst about the end of progress and the middle class decline are a critical factor and restarting middle class progress remains one of the highest priority issues. The selected emphases of the government such as income splitting for stay at home spouses, even more security focus to deal with the apocalyptic threat of ISIS and Jihadism are rated almost dead last

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[1] EKOS Politics, "*Logjam Continues as Canadians Become More Receptive to Innovative Political Approaches*", May 29, 2015. Available online at: http://goo.gl/MqMoCp

[2] EKOS Politics, "*Clear Forces, Highly Unpredictable Outcomes*", July 17, 2015. Available online at: http://goo.gl/F1ltzh

in trade-off analyses.[3] Finally, the government is 10 points shy of where it was last election with only six per cent citing them as second choice.

State of the Canadian economy

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

76% say recession/depression   **18% say period of growth**

| 9 | 16 | 51 | 15 | 3 | 6 |

- ■ 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; July 17-21, 2015 (n=1,490), MOE +/- 2.5%, 19 times out of 20

Tracking state of the economy (adjusted*)

Q. Which of the following best describes how you feel about Canada's economy?
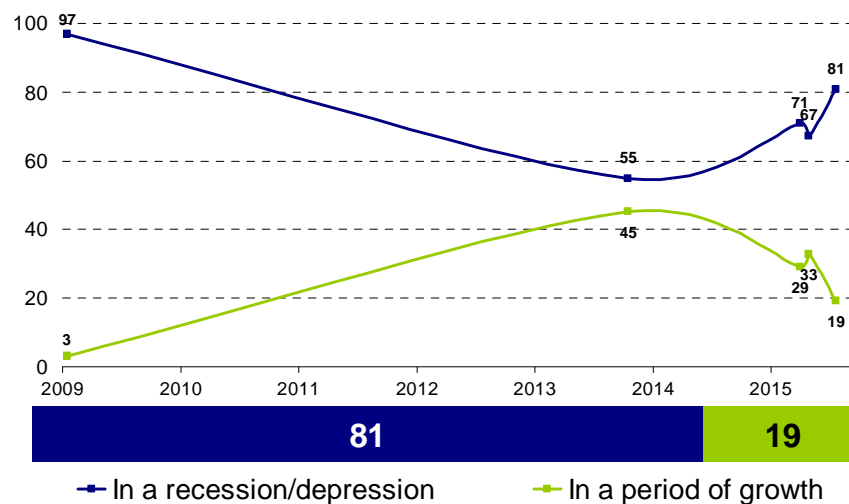
| 81 | 19 |

-■- In a recession/depression   -■- In a period of growth

*Figures adjusted to exclude those who skipped the question.

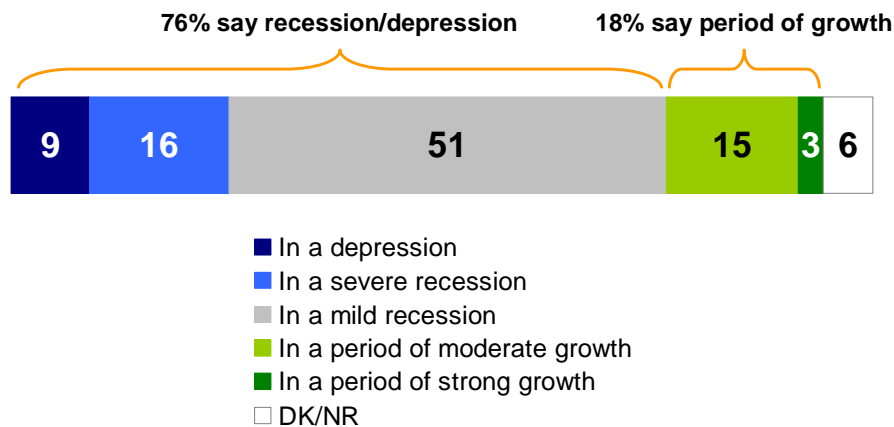**BASE:** Canadians; July 17-21, 2015 (n=1,490), MOE +/- 2.5%, 19 times out of 20

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[3] EKOS Politics, "*Logjam Continues as Canadians Become More Receptive to Innovative Political Approaches*", May 29, 2015. Available online at: http://goo.gl/MqMoCp

Job approval ratings

Q. *Do you approve or disapprove of the way the following individuals are handling their jobs?*

Thomas Mulcair
Leader of the Official Opposition / NDP

11	32	57

n=1,106, MOE +/- 3.0%, 19 times out of 20

Elizabeth May
Leader of the Green Party

14	39	47

n=1,164, MOE +/- 2.9%, 19 times out of 20

Gilles Duceppe
Leader of the Bloc Québécois

9	45	46

(Quebec only, full sample) n=498, MOE +/- 4.4%, 19 times out of 20

Justin Trudeau
Leader of the Liberal Party

10	51	40

n=1,083, MOE +/- 3.0%, 19 times out of 20

Stephen Harper
Prime Minister / Leader of the Conservative Party

7	61	33

n=1,141, MOE +/- 2.9%, 19 times out of 20

☐ DK/NR   ■ Disapprove   ■ Approve
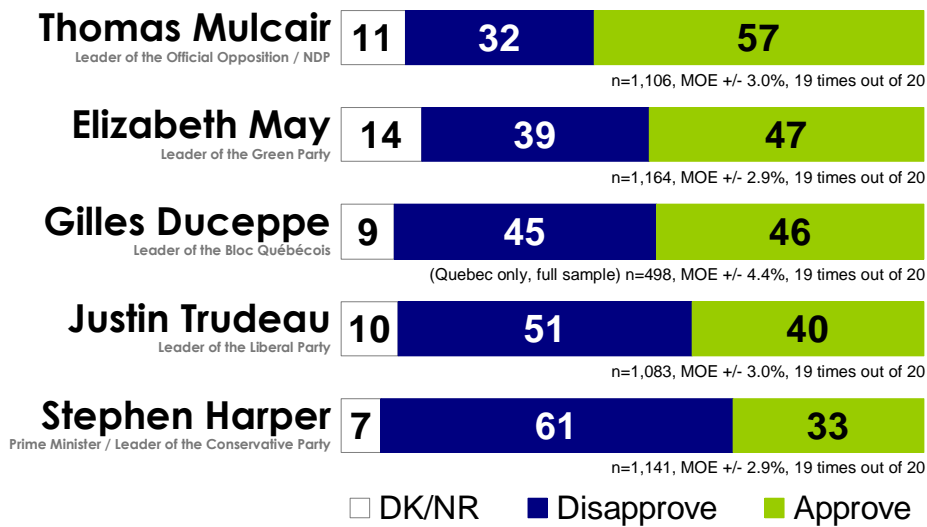
BASE: Canadians (half-sample each); July 22-28, 2015

Theoretical party ceilings

Q. *If a federal election were held tomorrow, which party would you vote for?*
[IF DECIDED] Which party would be your second choice?

Party	First choice	Second choice	Total
NDP	33.8	17.4	50.7%
Liberal	23.4	17.3	40.7%
Conservative	30.1	6.5	36.6%
green	6.1	8.8	14.9%
BLOC QUÉBÉCOIS	4.7	3.8	8.5%
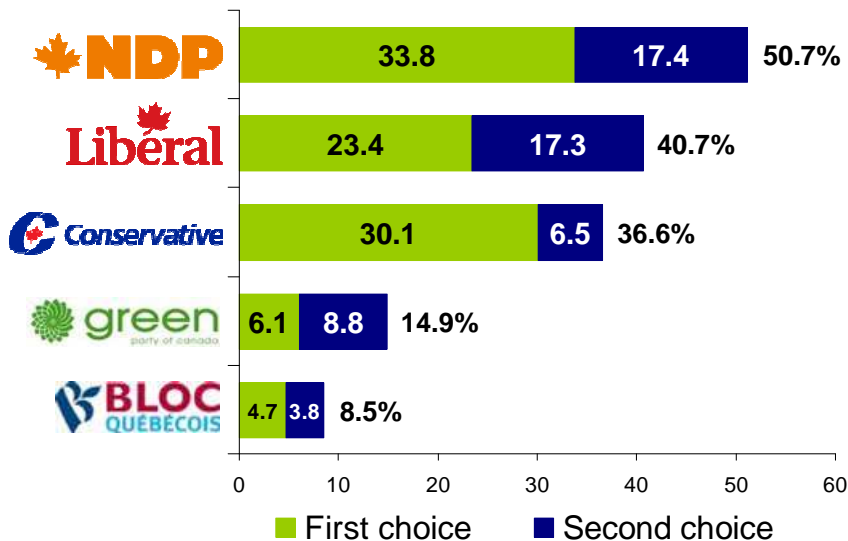
■ First choice   ■ Second choice

BASE: Canadians with a first choice; July 22-28, 2015 (n=1,944), MOE +/- 2.2%, 19 times out of 20

So the Conservative Party's route to power appears to be Sisyphean and the gig must be up for Stephen Harper, right? Not so fast. Let's consider some of the alternative evidence. First of all, given the inventory of gloom noted above, the government is surprisingly very much in the race and registering poll support within range of what they had at this stage of the 2011 campaign. They got a modest uptick over the ISIS ads and they got a more sizable and important bounce from their cheque bonanza to families with kids in the home. We note a significant uptick in their status with this demographic but we also note that the effects appear to be smaller in recent days than they were immediately after receipt of cheques. Perhaps the cookbook on Vote Buying 101 hasn't perfected the issue of the shelf life of such largesse and this may be one of the reasons we will be seeing an early writ.

The most important asset for the government remains the fracture of the center left. The NDP and Liberals draw from very similar constituencies and they are basically churning the same voters back and forth. Without strategic voting or some form of tacit or explicit co-operation between the progressive parties, they risk seeing Harper retain power with an even smaller plurality than 2011. It also appears that both the Green Party and the Bloc are being caught in the downdraft of this new normal and, for many progressive voters who like them and their leaders, it seems the stakes are too high to continue to support them at this time.

Riding analysis

As we have stressed many times before, the NDP and Liberals draw on very similar constituencies and there is a strong risk of the two parties splitting the progressive vote and allowing the Conservatives to eke out a narrow victory. Nowhere is this problem more acute than in Ontario. We have conducted a riding-level analysis using all of our data from the past four months and, while we will not be releasing the analysis itself given that the samples are too small, we would like to illustrate the problem of vote splitting with a particularly vivid example.

In the riding of Etobicoke-Lakeshore, the Conservatives lead the Liberals by just a fraction of a percentage point, while the NDP sits more than ten points back. Even though two-thirds of the riding supports a progressive candidate, the Conservatives stand to win by a margin of just 300 votes. In all, we have identified 31 ridings in Ontario alone where the Conservatives hold a lead of 10 points or less.

Note that we are only presenting this example for illustrative purposes and it should be treated with extreme caution due to the limited sample size and extended period. We would need to do much more extensive sampling at a riding level (as well as include cellphone-only households) to support a real – not hypothetical – strategic voting aid.

Tracking approval ratings

Approval: Stephen Harper (adjusted*)

Q. *Do you approve or disapprove of the way Stephen Harper, Prime Minister of Canada and leader of the Conservative Party of Canada, is handling his job?*
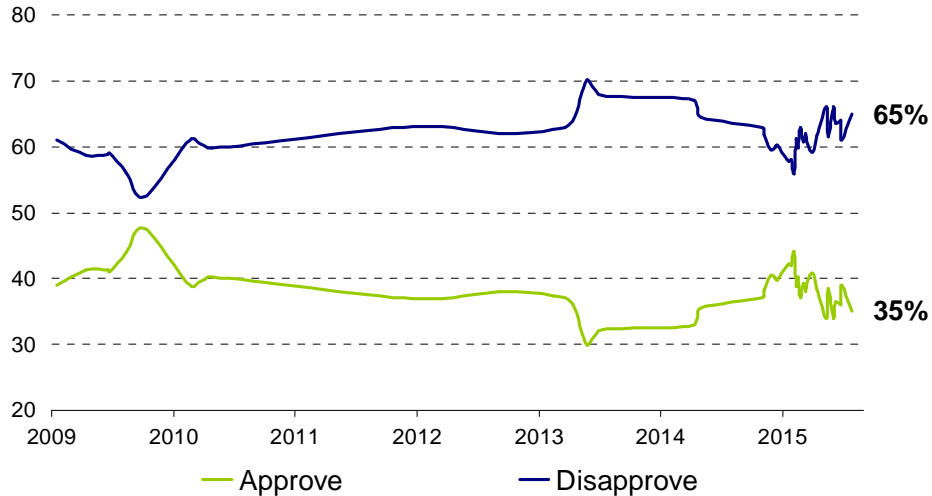
65%

35%

— Approve   — Disapprove

Figures adjusted to exclude those who skipped the question.

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BASE: Canadians (half-sample); July 22-28, 2015 (n=1,141), MOE +/- 2.9%, 19 times out of 20

Approval: Thomas Mulcair (adjusted*)

Q. *Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?*

64%

36%

— Approve   — Disapprove
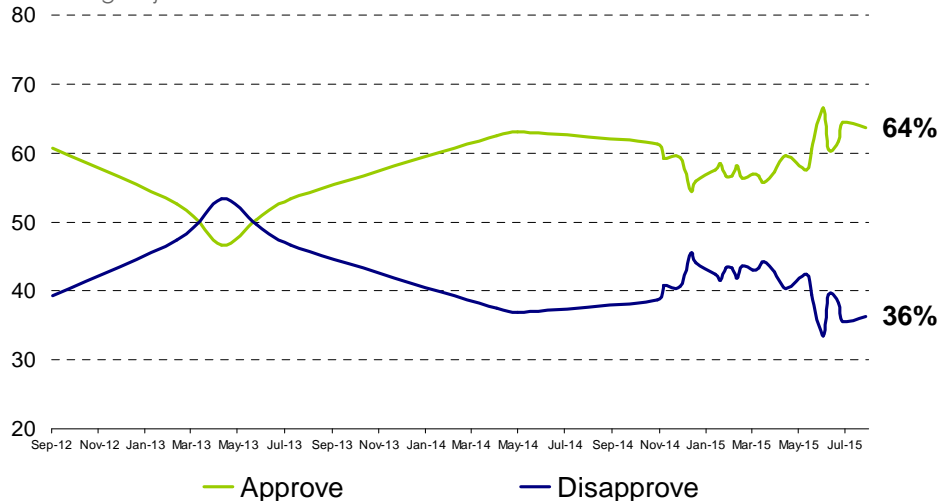
Figures adjusted to exclude those who skipped the question.

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BASE: Canadians (half-sample); July 22-28, 2015 (n=1,106), MOE +/- 3.0%, 19 times out of 20

Approval: Justin Trudeau (adjusted*)

Q. Do you approve or disapprove of the way Justin Trudeau, leader of the Liberal Party of Canada, is handling his job?

— Approve — Disapprove

56%
44%
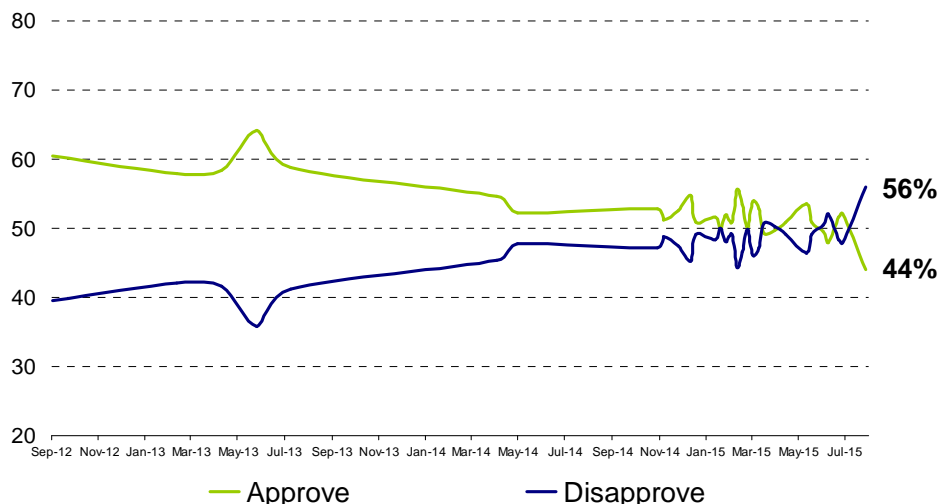
Figures adjusted to exclude those who skipped the question.

BASE: Canadians (half-sample); July 22-28, 2015 (n=1,083), MOE +/- 3.0%, 19 times out of 20

Approval: Elizabeth May (adjusted*)

Q. Do you approve or disapprove of the way Elizabeth May, leader of the Green Party of Canada, is handling her job?
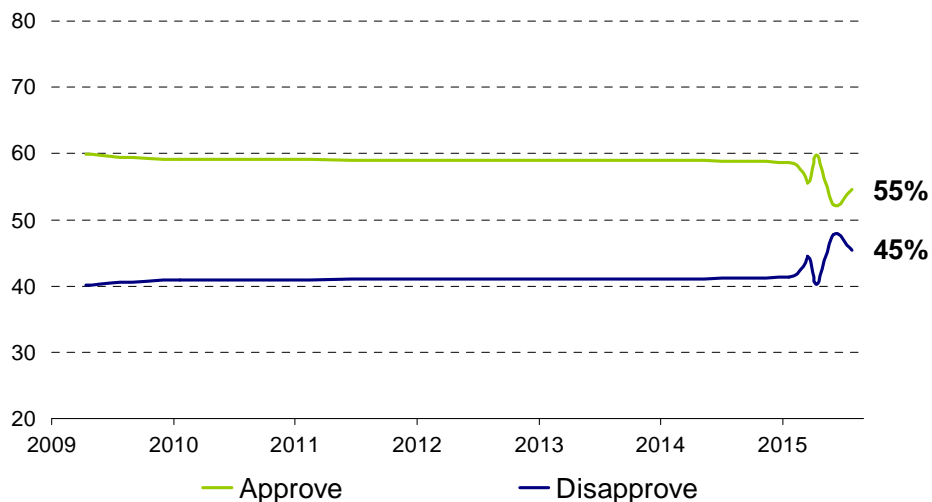
— Approve — Disapprove

55%
45%

Figures adjusted to exclude those who skipped the question.

BASE: Canadians (half-sample); July 22-28, 2015 (n=1,164), MOE +/- 2.9%, 19 times out of 20

Approval of Bloc Québécois leaders

Q. Do you approve or disapprove of the way the following individuals are handling their jobs?

Gilles Duceppe (July 2015)

9	45	46

BASE: Quebec residents; July 22-28, 2015 (n=498), MOE +/- 4.4%, 19 times out of 20

Mario Beaulieu (October 2014)

41	48	12

BASE: Quebec residents; October 10-15, 2014 (n=721), MOE +/- 3.7%, 19 times out of 20

☐ DK/NR ■ Disapprove ■ Approve

Detailed Tables:

National Federal Vote Intention (decided and leaning voters only)
Field Dates: July 22-28, 2015

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?

	Liberal Party	Conser-vative Party	NDP	Green Party	Bloc Québécois	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	**23.4%**	**30.1%**	**33.8%**	**6.1%**	**4.7%**	**1.9%**	**1944**	**2.2**
REGION								
British Columbia	19.3%	29.2%	39.5%	10.3%	–	1.7%	284	5.8
Alberta	15.5%	44.3%	32.3%	4.1%	–	3.9%	209	6.8
Saskatchewan	14.3%	32.5%	41.5%	10.1%	–	1.7%	79	11.0
Manitoba	27.4%	36.1%	33.9%	2.2%	–	0.3%	87	10.5
Ontario	29.0%	32.9%	30.1%	6.9%	–	1.1%	677	3.8
Quebec	17.0%	20.7%	36.3%	3.7%	19.6%	2.6%	442	4.7
Atlantic Canada	36.7%	24.3%	32.7%	4.7%	–	1.6%	163	7.7
GENDER								
Male	22.1%	34.8%	32.9%	5.2%	3.8%	1.2%	988	3.1
Female	25.0%	25.3%	34.9%	6.9%	5.6%	2.2%	935	3.2
AGE								
<35	23.5%	27.9%	31.9%	7.1%	6.2%	3.4%	168	7.6
35-49	23.6%	29.4%	35.1%	5.1%	5.5%	1.3%	356	5.2
50-64	23.8%	28.3%	35.8%	6.8%	4.4%	1.0%	649	3.9
65+	23.0%	37.0%	31.4%	5.4%	2.2%	1.0%	753	3.6
EDUCATION								
High school or less	22.9%	36.2%	25.3%	7.0%	6.7%	2.0%	449	4.6
College or CEGEP	21.2%	33.1%	33.7%	5.2%	4.4%	2.4%	620	3.9
University or higher	26.0%	23.4%	40.5%	5.8%	3.4%	1.0%	850	3.4
CHILDREN <18 AT HOME?								
Yes	19.9%	34.6%	31.6%	6.0%	5.6%	2.2%	410	4.8
No	25.6%	27.8%	34.7%	6.1%	4.3%	1.5%	1498	2.5

Second Choice

Field Dates: July 22-28, 2015

Q. [Decided Voters Only] Talking again in terms of a federal election, which party would be your second choice?

	LPC	CPC	NDP	GP	BQ	Other	None	DK/NR	Sample Size	MOE (+/-)
NATIONALLY	**17.3%**	**6.5%**	**17.4%**	**8.8%**	**3.8%**	**2.7%**	**41.4%**	**2.1%**	**1944**	**2.2**
REGION										
British Columbia	18.6%	8.6%	14.6%	9.8%	–	4.5%	42.8%	1.1%	284	5.8
Alberta	20.7%	8.9%	10.8%	6.8%	–	4.8%	46.6%	1.2%	209	6.8
Saskatchewan	19.9%	4.8%	9.9%	11.5%	–	0.5%	47.9%	5.5%	79	11.0
Manitoba	13.0%	5.0%	17.0%	9.2%	–	3.7%	48.6%	3.4%	87	10.5
Ontario	16.0%	5.6%	19.3%	11.5%	–	2.6%	42.9%	2.1%	677	3.8
Quebec	16.9%	6.3%	17.0%	5.3%	15.9%	1.6%	34.3%	2.6%	442	4.7
Atlantic Canada	20.0%	5.4%	27.3%	6.2%	–	0.6%	39.9%	0.6%	163	7.7
GENDER										
Male	19.7%	5.9%	17.0%	9.6%	2.8%	2.4%	40.8%	1.7%	988	3.1
Female	15.0%	7.0%	18.0%	7.9%	4.8%	3.0%	42.2%	2.0%	935	3.2
AGE										
<35	15.4%	7.2%	16.9%	10.3%	3.6%	3.0%	41.3%	2.2%	168	7.6
35-49	16.1%	5.7%	18.3%	7.6%	6.0%	2.7%	41.4%	2.1%	356	5.2
50-64	20.0%	6.9%	18.4%	9.1%	3.0%	2.5%	38.2%	1.9%	649	3.9
65+	17.5%	6.1%	15.5%	7.9%	2.0%	2.5%	47.4%	1.0%	753	3.6
EDUCATION										
High school or less	16.0%	5.2%	15.1%	5.3%	2.2%	2.8%	51.4%	2.1%	449	4.6
College or CEGEP	13.4%	6.8%	17.0%	9.8%	5.4%	3.3%	42.5%	1.8%	620	3.9
University or higher	21.6%	7.3%	19.7%	10.7%	3.7%	2.1%	33.4%	1.6%	850	3.4
CURRENT VOTE INTENTION										
Liberal Party	–	10.6%	42.9%	7.6%	0.8%	0.7%	35.4%	2.0%	447	4.6
Conservative Party	13.2%	–	14.4%	6.5%	1.8%	2.4%	59.1%	2.6%	590	4.0
NDP	34.1%	7.6%	–	13.2%	8.5%	3.1%	32.5%	1.0%	668	3.8
Green Party	16.8%	12.5%	33.5%	–	0.3%	5.9%	25.6%	5.5%	109	9.4
Bloc Québécois	13.3%	7.2%	19.3%	6.1%	–	4.8%	48.1%	1.2%	78	11.1

Support for a Coalition Government Led by Justin Trudeau

Field Dates: July 22-28, 2015

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made of up Liberals and New Democrats and led by Liberal leader Justin Trudeau, which would you prefer?

	A Conservative government	A coalition government	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	**35.0%**	**56.2%**	**8.8%**	**988**	**3.1**
REGION					
British Columbia	43.6%	51.5%	5.0%	130	8.6
Alberta	45.2%	45.9%	8.9%	110	9.3
Saskatchewan	18.7%	55.7%	25.6%	41	15.3
Manitoba	36.7%	31.4%	31.9%	48	14.1
Ontario	37.1%	56.3%	6.6%	330	5.4
Quebec	29.5%	64.0%	6.5%	237	6.4
Atlantic Canada	19.7%	65.9%	14.4%	89	10.4
GENDER					
Male	40.9%	54.5%	4.6%	477	4.5
Female	31.5%	62.2%	6.3%	470	4.5
AGE					
<35	30.3%	65.5%	4.2%	93	10.2
35-49	36.3%	58.4%	5.3%	175	7.4
50-64	34.5%	58.1%	7.4%	316	5.5
65+	48.1%	47.4%	4.5%	362	5.2
EDUCATION					
High school or less	53.3%	40.8%	5.8%	237	6.4
College or CEGEP	32.8%	62.1%	5.1%	304	5.6
University or higher	25.6%	69.6%	4.8%	399	4.9
CURRENT VOTE INTENTION					
Liberal Party	10.6%	86.7%	2.7%	208	6.8
Conservative Party	91.0%	8.3%	0.8%	244	6.3
NDP	17.2%	78.5%	4.3%	295	5.7
Green Party	17.4%	72.3%	10.4%	45	14.6
Bloc Québécois	26.7%	69.7%	3.6%	43	14.9

Support for a Coalition Government Led by Thomas Mulcair

Field Dates: July 22-28, 2015

Q. If you were forced to choose between a Conservative minority government led by Stephen Harper and a coalition government made of up New Democrats and Liberals and led by NDP leader Thomas Mulcair, which would you prefer?

	A Conservative government	A coalition government	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	**36.6%**	**55.5%**	**7.8%**	**993**	**3.1**
REGION					
British Columbia	27.6%	58.9%	13.5%	139	8.3
Alberta	47.2%	47.3%	5.5%	102	9.7
Saskatchewan	48.3%	35.9%	15.8%	36	16.3
Manitoba	41.3%	43.7%	15.0%	48	14.1
Ontario	41.2%	53.8%	5.0%	383	5.0
Quebec	28.2%	63.1%	8.8%	209	6.8
Atlantic Canada	32.0%	60.5%	7.5%	76	11.2
GENDER					
Male	39.1%	57.5%	3.3%	465	4.5
Female	37.2%	57.9%	4.9%	476	4.5
AGE					
<35	46.5%	52.6%	0.8%	85	10.6
35-49	33.4%	61.5%	5.2%	171	7.5
50-64	31.8%	61.9%	6.3%	324	5.4
65+	41.2%	52.7%	6.1%	364	5.1
EDUCATION					
High school or less	44.7%	52.4%	2.9%	237	6.4
College or CEGEP	41.1%	54.1%	4.9%	299	5.7
University or higher	30.5%	65.2%	4.4%	403	4.9
CURRENT VOTE INTENTION					
Liberal Party	25.7%	68.8%	5.5%	199	7.0
Conservative Party	91.0%	7.0%	2.0%	267	6.0
NDP	6.0%	91.6%	2.4%	300	5.7
Green Party	27.6%	67.9%	4.5%	46	14.5
Bloc Québécois	6.2%	93.8%	0.0%	27	18.9

Approval Rating – Stephen Harper

Field Dates: July 22-28, 2015

Q. [Half-sample only] Do you approve or disapprove of the way Stephen Harper, Prime Minister and leader of Conservative Party of Canada is handling his job?

	Approve	Disapprove	Don't know / No response	Sample Size	Margin of Error (+/-)
NATIONALLY	**32.7%**	**60.5%**	**6.8%**	**1141**	**2.9**
REGION					
British Columbia	30.9%	62.8%	6.3%	169	7.5
Alberta	34.7%	58.4%	6.9%	118	9.0
Saskatchewan	33.9%	55.8%	10.3%	43	14.9
Manitoba	32.2%	62.5%	5.4%	58	12.9
Ontario	36.1%	57.2%	6.7%	407	4.9
Quebec	29.6%	65.2%	5.2%	240	6.3
Atlantic Canada	22.9%	65.5%	11.6%	104	9.6
GENDER					
Male	38.2%	59.2%	2.6%	538	4.2
Female	30.3%	66.5%	3.2%	549	4.2
AGE					
<35	29.8%	65.5%	4.7%	106	9.5
35-49	31.7%	66.5%	1.8%	197	7.0
50-64	35.5%	62.2%	2.4%	353	5.2
65+	43.1%	53.5%	3.4%	429	4.7
EDUCATION					
High school or less	44.0%	53.8%	2.2%	257	6.1
College or CEGEP	35.8%	61.0%	3.2%	347	5.3
University or higher	25.5%	71.2%	3.3%	477	4.5
CURRENT VOTE INTENTION					
Liberal Party	12.5%	85.8%	1.7%	221	6.6
Conservative Party	88.2%	10.1%	1.7%	305	5.6
NDP	8.4%	89.1%	2.5%	338	5.3
Green Party	18.8%	76.8%	4.4%	50	13.9
Bloc Québécois	23.5%	76.5%	0.0%	41	15.3

Approval Rating – Thomas Mulcair

Field Dates: July 22-28, 2015

Q. [Half-sample only] Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?

	Approve	Disapprove	Don't know / No response	Sample Size	Margin of Error (+/-)
NATIONALLY	**56.6%**	**32.3%**	**11.1%**	**1106**	**3.0**
REGION					
British Columbia	51.6%	35.4%	13.0%	157	7.8
Alberta	41.9%	43.8%	14.3%	131	8.6
Saskatchewan	53.1%	29.8%	17.1%	51	13.7
Manitoba	41.1%	33.9%	25.0%	53	13.5
Ontario	61.6%	28.6%	9.7%	368	5.1
Quebec	59.6%	32.8%	7.6%	258	6.1
Atlantic Canada	63.2%	24.8%	12.0%	87	10.5
GENDER					
Male	60.7%	33.7%	5.6%	528	4.3
Female	57.3%	33.8%	8.9%	526	4.3
AGE					
<35	59.9%	32.9%	7.2%	91	10.3
35-49	59.2%	33.1%	7.7%	199	7.0
50-64	57.4%	32.8%	9.8%	370	5.1
65+	57.9%	35.9%	6.2%	399	4.9
EDUCATION					
High school or less	48.6%	45.0%	6.4%	263	6.0
College or CEGEP	58.1%	33.9%	8.1%	345	5.3
University or higher	68.1%	23.7%	8.2%	444	4.7
CURRENT VOTE INTENTION					
Liberal Party	56.8%	32.1%	11.2%	226	6.5
Conservative Party	35.2%	55.5%	9.3%	285	5.8
NDP	91.0%	6.3%	2.7%	330	5.4
Green Party	55.4%	33.9%	10.7%	59	12.8
Bloc Québécois	49.0%	47.8%	3.2%	37	16.1

Approval Rating – Justin Trudeau

Field Dates: July 22-28, 2015

Q. [Half-sample only] Do you approve or disapprove of the way Justin Trudeau, leader of the Liberal Party of Canada, is handling his job?

	Approve	Disapprove	Don't know / No response	Sample Size	Margin of Error (+/-)
NATIONALLY	**39.8%**	**50.5%**	**9.8%**	**1083**	**3.0**
REGION					
British Columbia	44.7%	48.6%	6.7%	160	7.8
Alberta	28.2%	58.7%	13.1%	117	9.1
Saskatchewan	31.5%	46.7%	21.9%	42	15.1
Manitoba	36.1%	49.6%	14.3%	50	13.9
Ontario	38.7%	52.8%	8.4%	372	5.1
Quebec	39.0%	50.9%	10.0%	238	6.4
Atlantic Canada	59.2%	32.0%	8.8%	103	9.7
GENDER					
Male	43.7%	53.2%	3.1%	515	4.3
Female	39.7%	52.8%	7.5%	509	4.3
AGE					
<35	53.1%	43.8%	3.1%	96	10.0
35-49	32.5%	60.4%	7.2%	201	6.9
50-64	42.2%	52.3%	5.5%	341	5.3
65+	38.4%	55.2%	6.4%	386	5.0
EDUCATION					
High school or less	42.4%	54.8%	2.8%	247	6.2
College or CEGEP	34.7%	59.6%	5.7%	324	5.4
University or higher	47.1%	46.0%	6.8%	450	4.6
CURRENT VOTE INTENTION					
Liberal Party	76.9%	18.6%	4.6%	201	6.9
Conservative Party	22.0%	74.7%	3.4%	287	5.8
NDP	41.2%	54.7%	4.0%	312	5.6
Green Party	37.2%	57.3%	5.5%	57	13.0
Bloc Québécois	23.5%	72.0%	4.5%	48	14.1

Approval Rating – Elizabeth May

Field Dates: July 22-28, 2015

Q. [Half-sample only] Do you approve or disapprove of the way Elizabeth May, leader of the Green Party of Canada, is handling his job?

	Approve	Disapprove	Don't know / No response	Sample Size	Margin of Error (+/-)
NATIONALLY	**47.1%**	**39.1%**	**13.8%**	**1164**	**2.9**
REGION					
British Columbia	55.2%	27.2%	17.5%	166	7.6
Alberta	40.9%	45.5%	13.5%	132	8.5
Saskatchewan	52.2%	35.0%	12.8%	52	13.6
Manitoba	39.5%	48.4%	12.1%	61	12.6
Ontario	48.1%	40.7%	11.3%	403	4.9
Quebec	42.6%	44.5%	12.9%	260	6.1
Atlantic Canada	53.2%	21.4%	25.5%	88	10.5
GENDER					
Male	46.3%	45.6%	8.1%	551	4.2
Female	50.8%	36.0%	13.2%	566	4.1
AGE					
<35	47.9%	42.9%	9.2%	101	9.8
35-49	49.2%	37.5%	13.4%	195	7.0
50-64	48.0%	40.2%	11.8%	382	5.0
65+	49.7%	42.1%	8.1%	442	4.7
EDUCATION					
High school or less	45.5%	44.3%	10.2%	273	5.9
College or CEGEP	45.8%	40.7%	13.4%	368	5.1
University or higher	53.8%	37.8%	8.5%	471	4.5
CURRENT VOTE INTENTION					
Liberal Party	55.6%	33.6%	10.8%	246	6.3
Conservative Party	26.9%	64.2%	8.9%	303	5.6
NDP	61.9%	27.8%	10.3%	356	5.2
Green Party	89.5%	8.2%	2.3%	52	13.6
Bloc Québécois	37.5%	50.5%	12.1%	30	17.9

State of Canada's Economy

Field Dates: July 15-21, 2015

Q. 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?

	Depress-ion	Severe recess-ion	Mild recess-ion	Moder-ate growth	Strong growth	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	**9.1%**	**16.2%**	**50.7%**	**15.3%**	**2.8%**	**5.8%**	**1490**	**2.5**
REGION								
British Columbia	3.3%	10.2%	62.3%	21.8%	0.0%	2.4%	38	15.9
Alberta	9.6%	15.5%	48.9%	16.2%	1.3%	8.5%	171	7.5
Saskatchewan	3.8%	9.1%	40.7%	26.0%	0.8%	19.7%	67	12.0
Manitoba	11.8%	13.0%	47.7%	16.0%	3.5%	8.0%	87	10.5
Ontario	8.4%	18.7%	52.6%	13.9%	2.9%	3.5%	620	3.9
Quebec	11.3%	15.7%	49.5%	14.0%	4.7%	4.8%	421	4.8
Atlantic Canada	11.4%	16.1%	41.2%	15.4%	0.5%	15.3%	84	10.7
GENDER								
Male	10.5%	17.2%	52.4%	16.7%	2.6%	0.6%	668	3.8
Female	8.7%	16.8%	53.6%	15.2%	3.3%	2.5%	745	3.6
AGE								
<35	10.8%	14.8%	56.8%	13.8%	2.8%	0.9%	132	8.5
35-49	10.3%	19.2%	50.2%	14.7%	2.0%	3.6%	310	5.6
50-64	7.0%	19.0%	54.8%	16.0%	2.8%	0.4%	510	4.3
65+	10.0%	13.4%	49.0%	21.2%	4.4%	1.9%	464	4.6
EDUCATION								
High school or less	14.9%	13.2%	45.9%	19.5%	4.8%	1.6%	349	5.3
College or CEGEP	8.1%	21.7%	48.2%	17.3%	2.8%	1.9%	449	4.6
University or higher	6.6%	15.6%	61.9%	12.5%	1.9%	1.5%	614	4.0
CURRENT VOTE INTENTION								
Liberal Party	7.2%	15.4%	58.5%	15.3%	2.8%	0.9%	274	5.9
Conservative Party	4.9%	9.7%	55.9%	25.3%	2.8%	1.3%	403	4.9
NDP	10.2%	22.2%	55.2%	10.2%	1.7%	0.6%	406	4.9
Green Party	14.5%	29.5%	30.1%	10.0%	7.6%	8.3%	66	12.1
Bloc Québécois	15.4%	17.2%	54.9%	7.2%	5.3%	0.0%	71	11.6

Direction of Country

Field Dates: July 22-28, 2015

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	**40.7%**	**52.6%**	**6.7%**	**1060**	**3.0**
REGION					
British Columbia	42.4%	52.5%	5.1%	149	8.0
Alberta	42.2%	50.7%	7.1%	130	8.6
Saskatchewan	20.4%	58.9%	20.7%	38	15.9
Manitoba	34.2%	55.6%	10.2%	50	13.9
Ontario	39.8%	52.9%	7.3%	355	5.2
Quebec	43.7%	50.3%	5.9%	235	6.4
Atlantic Canada	42.5%	56.4%	1.1%	101	9.8
GENDER					
Male	43.5%	54.1%	2.3%	499	4.4
Female	41.2%	54.8%	4.0%	511	4.3
AGE					
<35	43.1%	53.8%	3.1%	97	10.0
35-49	41.7%	54.4%	3.9%	188	7.2
50-64	39.9%	58.1%	2.0%	357	5.2
65+	44.7%	50.1%	5.2%	368	5.1
EDUCATION					
High school or less	44.0%	52.8%	3.1%	240	6.3
College or CEGEP	45.8%	50.2%	4.0%	301	5.7
University or higher	37.9%	58.7%	3.4%	465	4.5
CURRENT VOTE INTENTION					
Liberal Party	32.9%	65.1%	2.0%	198	7.0
Conservative Party	79.4%	19.2%	1.4%	285	5.8
NDP	21.3%	76.6%	2.1%	323	5.5
Green Party	20.2%	71.5%	8.3%	47	14.3
Bloc Québécois	43.0%	52.5%	4.5%	32	17.3

Direction of Government

Field Dates: July 22-28, 2015

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	**33.6%**	**59.7%**	**6.7%**	**1187**	**2.8**
REGION					
British Columbia	28.4%	63.4%	8.2%	177	7.4
Alberta	38.7%	55.6%	5.7%	119	9.0
Saskatchewan	42.9%	42.4%	14.7%	56	13.1
Manitoba	24.2%	67.2%	8.6%	61	12.6
Ontario	38.6%	55.0%	6.4%	420	4.8
Quebec	29.3%	66.6%	4.0%	263	6.0
Atlantic Canada	24.1%	64.5%	11.4%	90	10.3
GENDER					
Male	37.4%	59.1%	3.5%	567	4.1
Female	32.6%	64.7%	2.8%	564	4.1
AGE					
<35	25.5%	71.5%	3.0%	100	9.8
35-49	36.2%	60.8%	3.0%	208	6.8
50-64	34.8%	62.3%	2.9%	366	5.1
65+	45.5%	49.4%	5.1%	460	4.6
EDUCATION					
High school or less	44.1%	53.6%	2.3%	280	5.9
College or CEGEP	34.4%	62.7%	2.9%	391	5.0
University or higher	27.4%	68.8%	3.8%	456	4.6
CURRENT VOTE INTENTION					
Liberal Party	25.2%	70.4%	4.4%	249	6.2
Conservative Party	80.0%	18.3%	1.7%	305	5.6
NDP	11.4%	86.3%	2.2%	345	5.3
Green Party	22.6%	74.2%	3.3%	62	12.5
Bloc Québécois	7.8%	92.2%	0.0%	46	14.5

Methodology:

This study draws on data from two separate surveys, both of which were 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 the first survey are July 15-21, 2015. In total, a random sample of 2,400 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.

The field dates for second survey are July 22-28, 2015. In total, a random sample of 2,247 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-2.1 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.