

PRIVATE CLIENT BRIEFING NOTE  
INSIGHTS ON ELECTION 2019AND THEN THINGS STARTED TO  
CHANGE: ONE WEEK TO GO  
2019 ELECTION BRIEFING

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We finished the next wave of research Thursday evening. All interviews were done after the English-language debate and before the French-language debate Thursday evening.

For most of the campaign, little in public opinion or intentions have changed. But in the past week, we have seen some meaningful change that is making the election harder to call and the makeup of parliament even more fragmented than we thought when the campaign started.

As Canadians get together with family and friends over Thanksgiving weekend and advance voting begins, the polls appear to be moving.

Here's what I see at this point in the campaign.

1. **NDP AND BQ BOUNCE:** The NDP and BQ have gained support at the expense of the Liberals and Conservatives. Nationally, the Liberals and Conservatives are tied at 32% apiece with the NDP at 18% (up 3 since the last wave). The Greens are at 9% while the BQ is at 25% in Quebec, up 5 points since the end of September.

Regionally, the Liberals continue to lead in Ontario and Atlantic Canada, the Conservatives in the Prairies, while BC has become almost a three-way race between the Liberals, Conservatives, and NDP.

The most dramatic change has occurred in Quebec where some polls this week have reported the BQ rising to a tie or even surpassing the Liberals. We still have the Liberals 12-points ahead but regardless of whether it's 12-point LPC lead or a tie, the BQ has surged and could take between 30 and 50 seats completely devastating the Liberal path to a majority and even a path to winning more seats.

2. **SINGHMANIA?:** With a good performance in the English-language debate, Jagmeet Singh's personal numbers have surged, rising 10-points since the end of September.

Mr. Trudeau's numbers have remained consistent with about half viewing him negatively and 1 in 3 having a positive impression.

In contrast to Mr. Trudeau's static numbers, Mr. Scheer's negatives

have continued to rise. 47% now have a negative impression of the Conservative leader, a 5-point increase since the end of September and an 11-point increase since our first survey in August. Mr. Scheer's positives have not increased as people have become aware of Mr. Scheer and gotten to know him; most have responded negatively to what they have learned.

3. **AFFORDABILITY FOCUS:** The issue set of the campaign hasn't changed much since the start of the campaign. Affordability, climate change, health care, and taxes dominate as the top issues for more voters. No party has a real advantage on who voters think would do best on the cost of living while the Conservatives lead among those who care about taxes, fiscal management, and immigration. Compared to the Conservatives, the Liberals have an advantage on health issues, poverty and inequality, and climate change, but these advantages are being increasingly complicated by the NDP and Greens, who have gained on some of these issues since the start of the campaign.
4. **THINKING WHO WILL WIN MATTERS:** Most Canadians (86%) believe the election is close and more think the Liberals will form a government than the Conservatives. These perceptions seem to be important in explaining the rise of the NDP and BQ over the past few days.

To assess what might happen if voters consolidate around a choice between the two parties at the top of the polls, we asked respondents if they would prefer to see Mr. Trudeau or Mr. Scheer become PM after the election. Overall, 54% would prefer Mr. Trudeau and 46% prefer Mr. Scheer (this is unchanged from last week).

Among NDP, Green, and BQ supporters, 66% would prefer Justin Trudeau return as prime minister over Mr. Scheer. Half of them (52% and 10% of the electorate) already think the Liberals will win, which means it will be harder for the Liberals to persuade them to vote strategically to block a Conservative win unless they become convinced in the next week that a Conservative victory is more likely.

5. Another 30% of these NDP/Green/BQ voters who want Trudeau over Scheer feel the Conservatives might win or the outcome isn't clear (5% of the electorate). These may decide to vote that feeling more readily since they are not convinced right now that the Liberals will pull out a victory.
6. **TURNOUT, TURNOUT, TURNOUT:** Turnout remains an obviously critical variable. Among those most likely to vote, the 32/32 race becomes a 35/30 race for the Conservatives. While Canadians seem as interested in this election than in 2015, motivation and enthusiasm to vote have shifted away from the Liberals (who likely had a turnout boost in 2015) to the Conservatives (who know have the most motivated supporters).
7. **PREDICTION? TOO CLOSE TO CALL:** Ultimately, calling this election remains very difficult. It looks more unlikely today that any party will be able to win a majority government given public sentiment and

current intentions. The rise of the BQ in Quebec has complicated things for both the Liberals and Conservatives, while NDP gains in Ontario, BC, and Atlantic Canada may allow them to hold more seats than we originally thought and further make a majority elusive for the Liberals and Conservatives.

8. **WHAT TO WATCH:** In the final days, I'll be watching a few things.
- a. First, which party do Canadians think will win the election? Right now, more think the Liberals will win, which may have freed some BQ, NDP and Green-oriented voters from shifting their preference because the risk of a Scheer government is low. If that changes, and I expect the Liberals to raise the alarm bells over the final week, that could cause these voters to rush to the Liberals to prevent that outcome.
  - b. Second, Mr. Singh has the momentum right now. The question is whether it persists or plateaus as he becomes the target of Liberal attacks. Watch how younger voters especially respond to Mr. Singh. The enthusiasm gap he holds right now over Mr. Trudeau among these key groups has widened, and if young people discussed politics with their family over turkey dinners this weekend and they tried to convince them of Mr. Singh's qualities, that could add fuel to their momentum.
  - c. Finally, we don't yet know how Canadians are reacting to the second French-language debate and the release of the Conservative platform – especially the costing. The Liberals have already started attacking the plan aggressively and describing the cuts and “austerity” as worse than what Doug Ford's government is doing in Ontario. The best bet for the Liberals is that people increasingly see a Conservative victory as likely, and that outcome tied to a risky platform that will cut needed services and infrastructure spending.

Our final campaign survey will go into the field Thursday, and I'll send a final note Sunday evening, sharing final thoughts before Election Day.