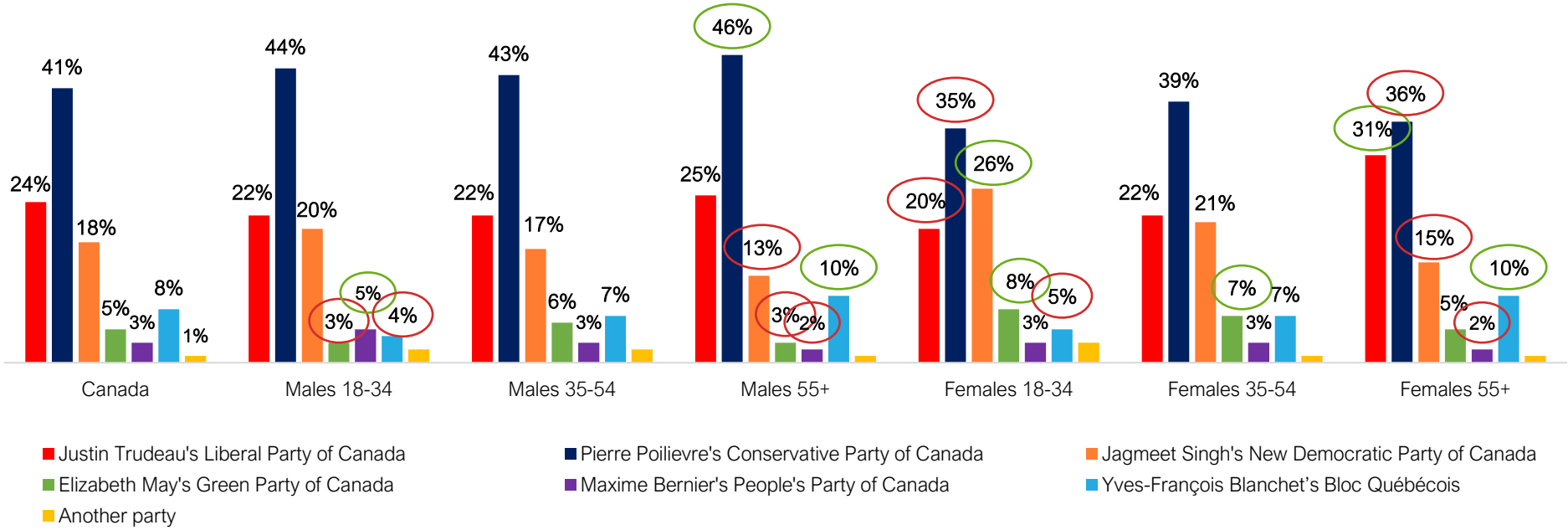
CAMPAIGN RESEARCH

What's Your Challenge? We'll Solve It!
Public Opinion Polling Press Release

Campaign Research conducted a public opinion research study with 5,018 eligible voters across Canada between Oct 8th, & Oct 10th, 2024.

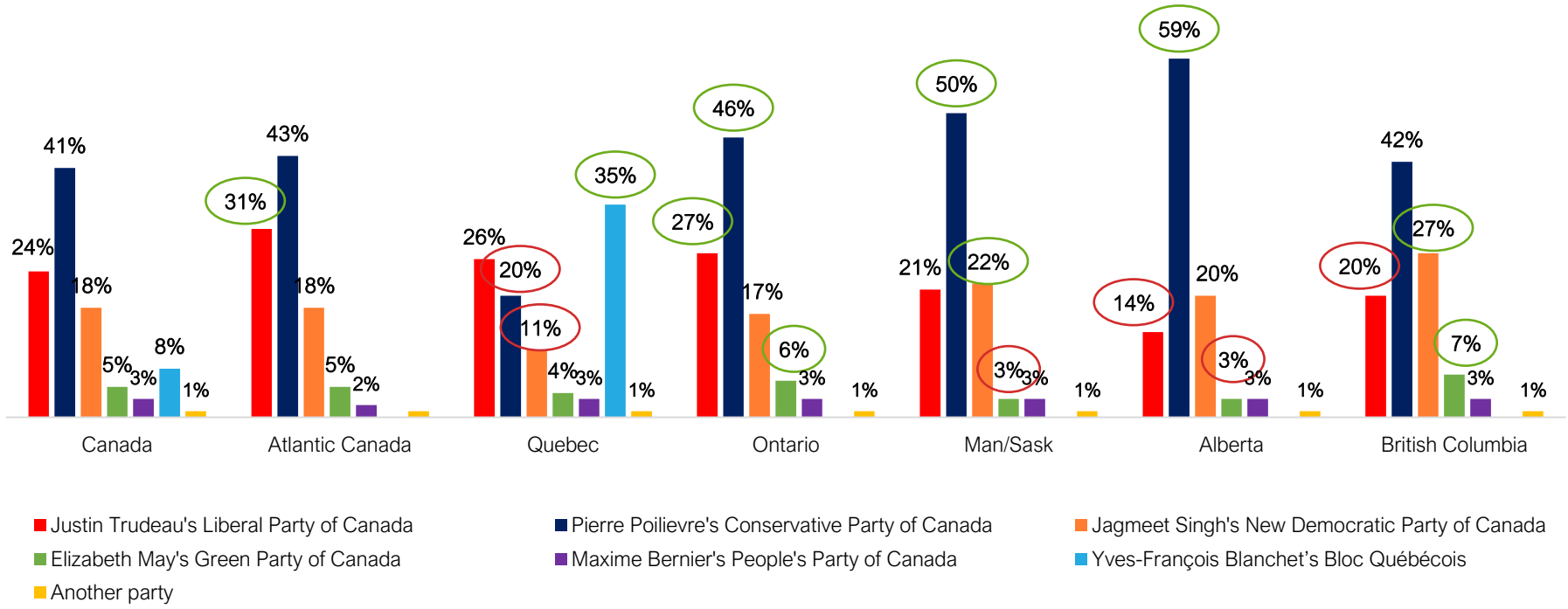
First, let's look at Ballot Support

Ages, Males and Females



Nationally, the Conservative Party of Canada (CPC) held commanding leads among males across all ages and among females under 55 years of age. The CPC held a small lead over the Liberal Party of Canada (LPC) among females over 54 years of age. The LPC trailed significantly across all ages, males and females except among females over 54 years of age, where they remained competitive. The New Democratic Party of Canada (NDP) performed somewhat better with females under 55 years of age but performed very poorly with males and females over 54 years of age.

Regions of Canada



The CPC held commanding leads in every region of Canada west of Quebec and also held a significant lead in Atlantic Canada. In Quebec, the CPC was trailing the LPC by 6-points and clearly in 3rd in that province. Despite the LPC trailing the CPC by 12-points in Atlantic Canada, it was their best showing across all the regions of Canada. In Quebec, the LPC trailed the Bloc by 9-points and were ahead of the CPC by 6-points. The NDP performed poorly across all the regions of Canada with their best showing in British Columbia where they trailed the CPC by 15-points.

The Bloc was leading in Quebec and held a significant lead over the LPC.

Some background: How we determine what drives ballot support and how leaders perform (on the issues) relative to one another

Drivers Analysis and Derived Importance

Derived importance (i.e. drivers) analysis uses statistical modelling to estimate relative importance across a set of attributes (i.e. driver variables) by connecting the attribute ratings with an outcome of interest. The output from a drivers analysis can help to focus limited resources in areas most likely to have a positive impact on an outcome of interest.

The basic problem in drivers analysis is to quantify the impact of each driver on the outcome. A statistically intuitive and well-defined way to do this is to derive the portion of explained variance (i.e. model R-squared) attributable to each driver attribute. Techniques like Johnson's Relative Importance, Shapley Regression, and LMG all do this via computationally intensive approaches to regression.

The derived relative importance scores resulting from a drivers analysis are naturally expressed in terms of "shares of importance" that sum to 100% and represent the relative importance of each driver. As such, the shares permit direct comparisons across the drivers within the analysis, such that a driver with a score of 10% can be described as "twice as important" as a driver with a score of 5%.

Relative Leadership Strength (RLS) Scores

Relative scoring techniques use chi-square analysis to examine association/ performance relative to expectations across a set of attributes and entities. The output from RLS scoring helps researchers understand relative performance along with absolute performance across leadership characteristics and leaders. Relative scores are also highly useful as an interpretive aid when reviewing spatial maps obtained via Correspondence Analysis, because the two analyses have close connections based on the chi-square statistic.

Absolute performance scores only tell part of the story of leadership performance. For example, a strong leader may be seen as dominant across all performance dimensions, thus leading to a "big brand effect" where the winner-takes-all comparing against scores of other leaders. By taking into account expected leader performance across all performance dimensions, and expected performance across all leaders, RLS reveals areas of significant relative strength (or weakness) across the dimensions of performance.

Statistically, RLS scores function as a set of context-specific Z-scores that are useful for evaluating relative leader performance. Interpreted as Z-scores, the RLS values can be easily stat-tested, colour-coded, or conditionally formatted to provide a quick visual assessment of relative performance across leaders and attributes. In general, RLS scores tend to dovetail very nicely with the major features shown on a Correspondence Analysis map. The two analyses have close connections based on the chi-square statistic. In many cases, RLS scores will highlight features that aren't obvious (or even apparent) when looking at a Correspondence Analysis map in isolation.

Perceptual (Spatial) Mapping

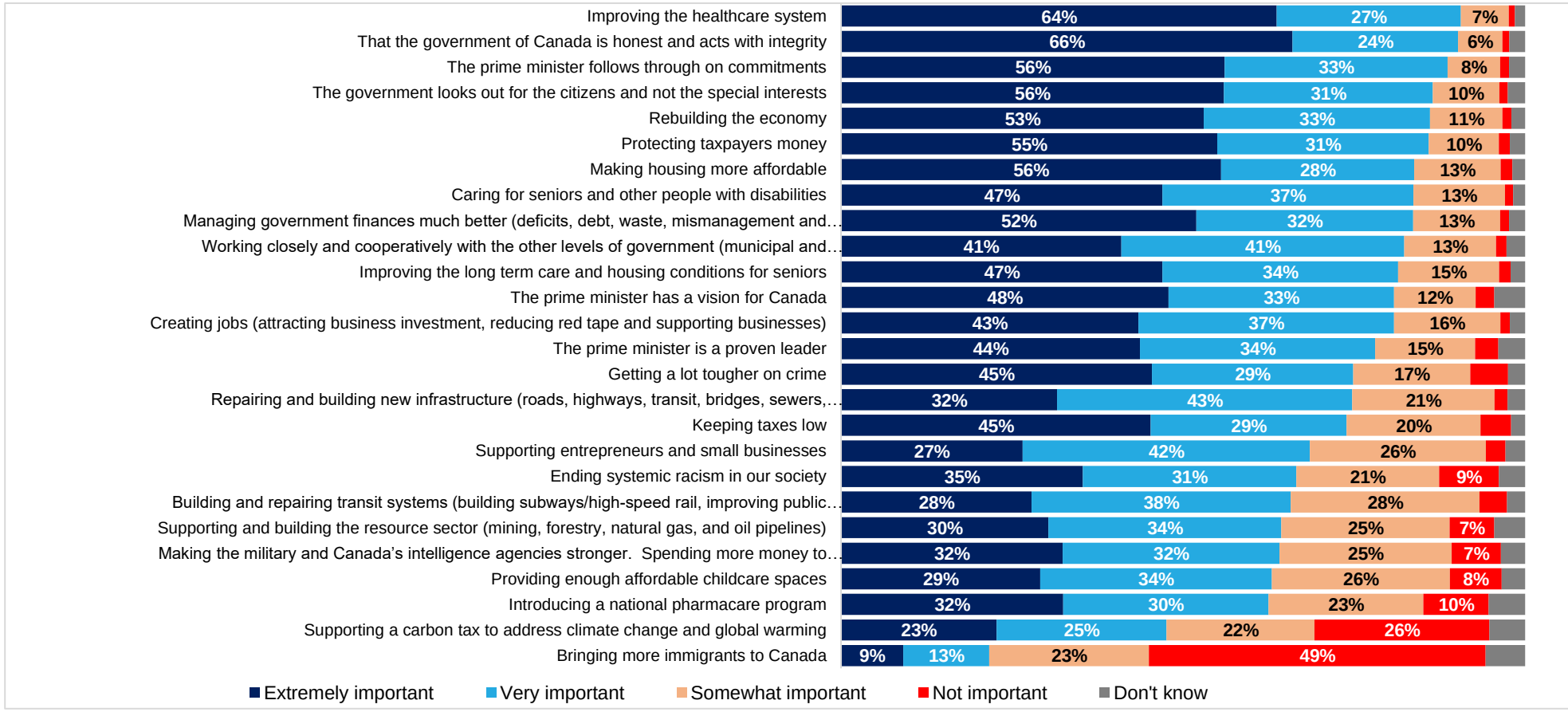
Perceptual mapping (a.k.a. spatial mapping) uses statistical modelling to examine patterns of association across a set of attributes. The output from perceptual mapping helps researchers and clients understand hidden relationships among attributes, or among attributes and entities (e.g. leadership characteristics and leaders).

The basic problem in perceptual mapping is to visualize multi-dimensional data in the form of a suitable two-dimensional representation (i.e. a map). Correspondence Analysis (CA), Multiple Correspondence Analysis (MCA), Multidimensional Scaling (MDS), and Principal Components Analysis (PCA) are multivariate data reduction techniques that can be used to reveal hidden relationships among attributes (or attributes and entities).

Perceptual maps require subjective interpretation of the X (Left/Right) and Y (Up/Down) axes that define the positioning of attributes on the map. The X-axis is the "strongest" axis, in the sense that it represents the dimension of greatest differentiation across the attributes. The Y-axis is the second-strongest axis, in the sense that it represents the dimension with the next greatest amount of differentiation (after accounting for the first dimension). Two-dimensional plots (maps) usually suffice to represent the most important themes in the data, though additional important (but less prominent) patterns may exist in the third and higher dimensions.

Alright, now, let's look at "stated" voter priorities outside the region of Quebec – Rest of Canada (RoC)

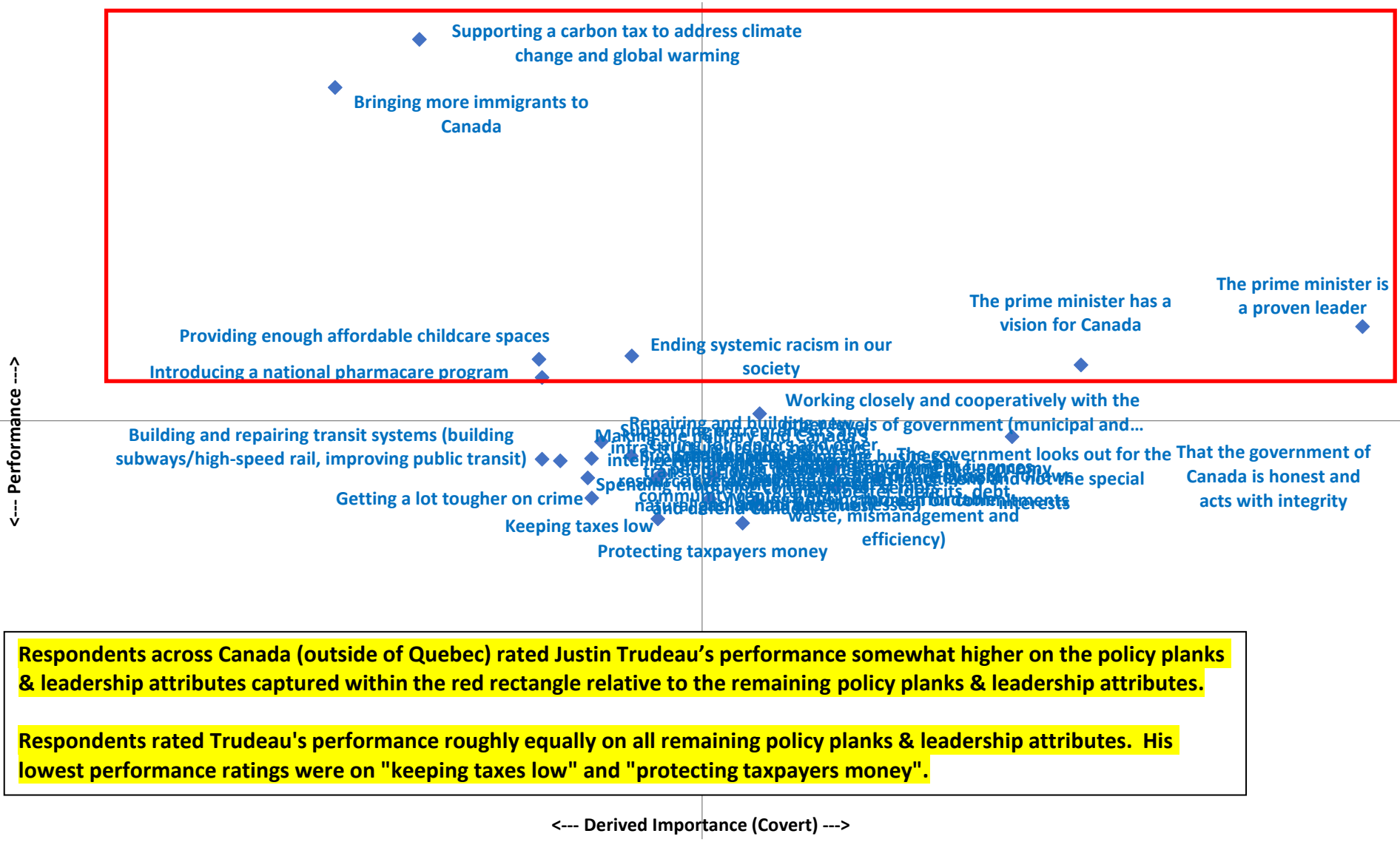
Stated Voter Priorities - Outside of Quebec



Now, let's look at how respondents rated the performance of each leader (relative only to themselves) on all the policy planks or leadership attributes (Outside of Quebec)

Note: We asked respondents to rate the performance of each leader on each policy plank & leadership attribute.

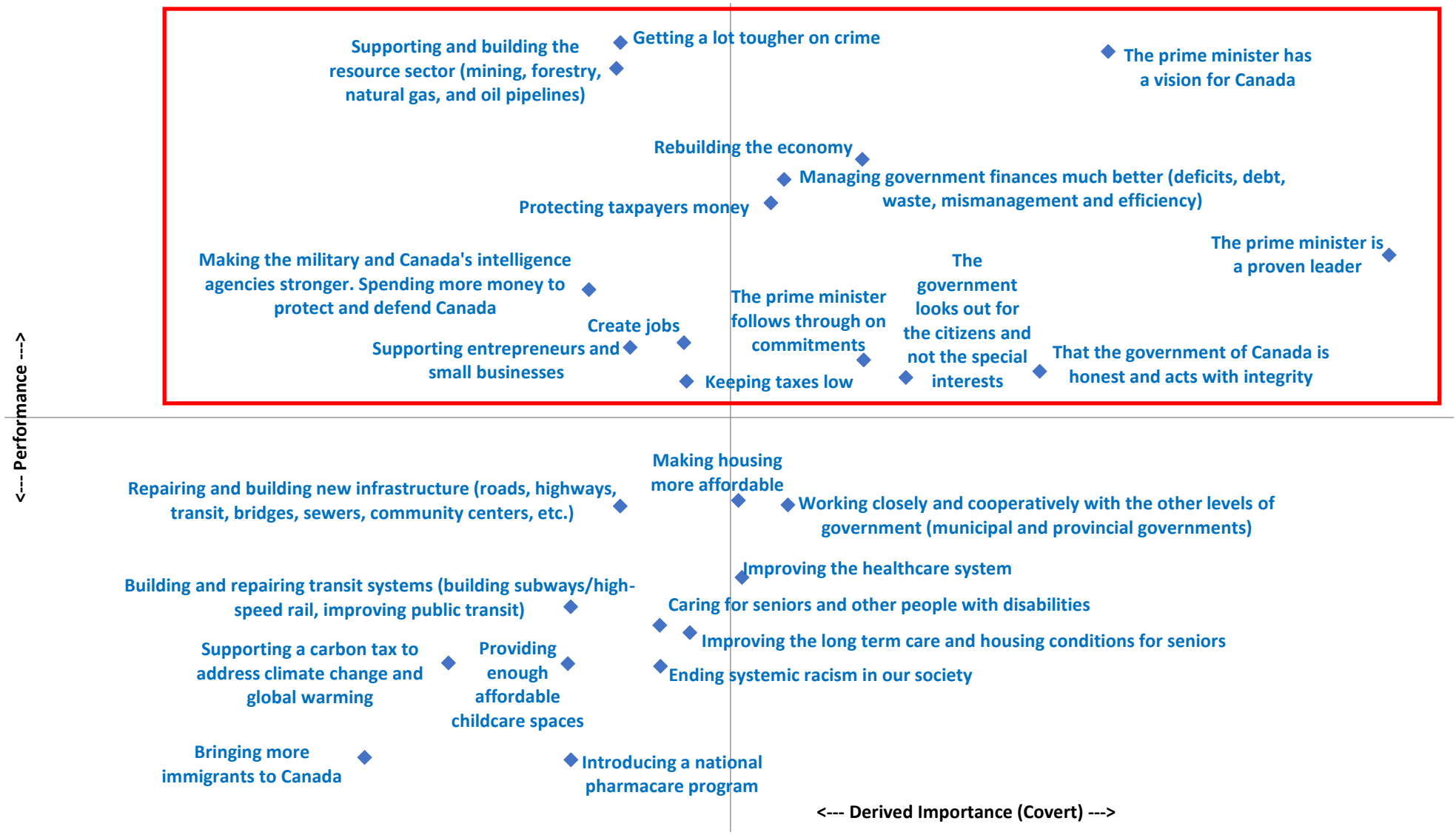
Justin Trudeau's performance on policy planks and leadership attributes - Outside of Quebec



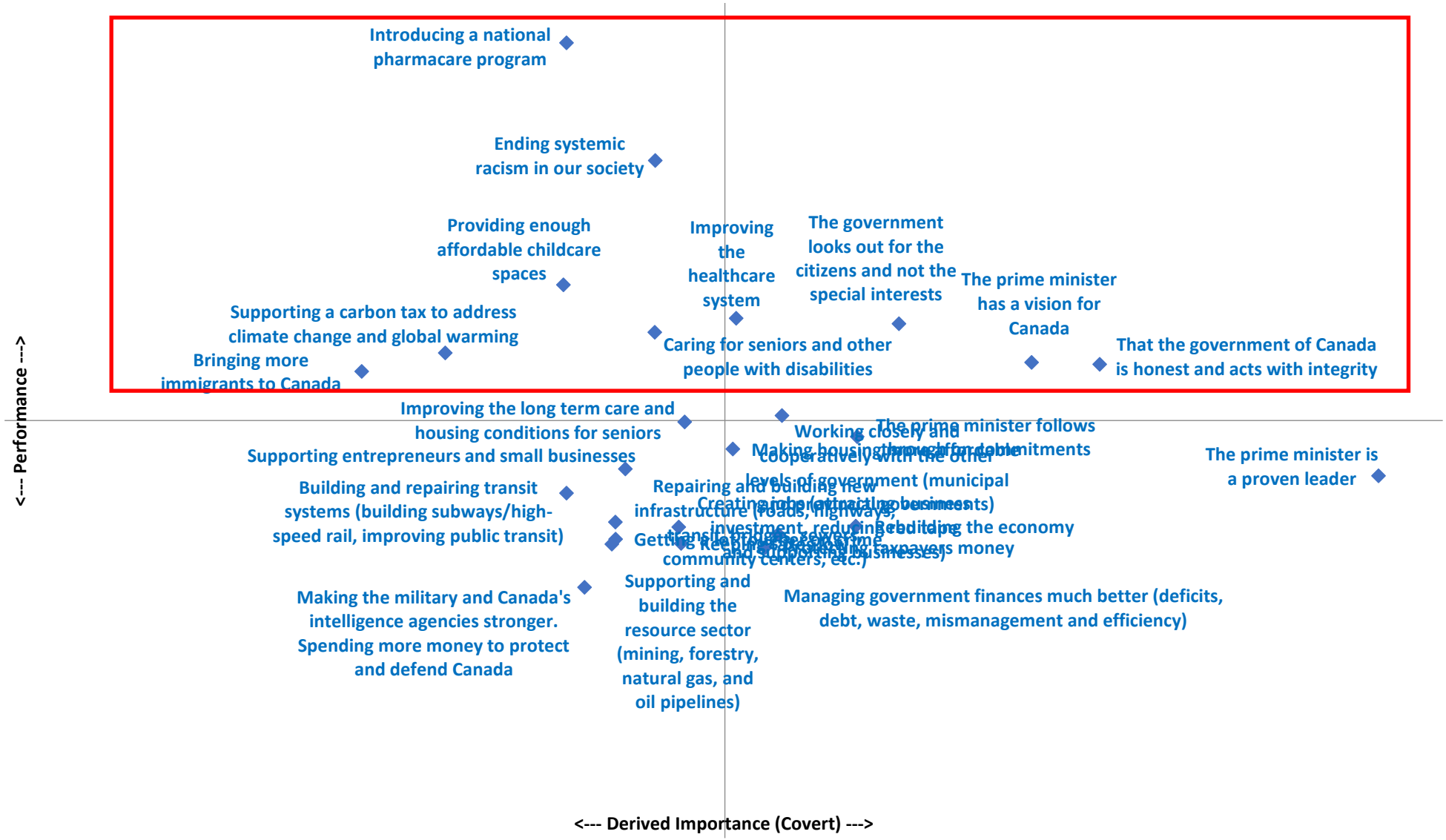
Respondents across Canada (outside of Quebec) rated Justin Trudeau's performance somewhat higher on the policy planks & leadership attributes captured within the red rectangle relative to the remaining policy planks & leadership attributes.

Respondents rated Trudeau's performance roughly equally on all remaining policy planks & leadership attributes. His lowest performance ratings were on "keeping taxes low" and "protecting taxpayers money".

Pierre Poilievre's performance on policy planks and leadership attributes - Outside of Quebec



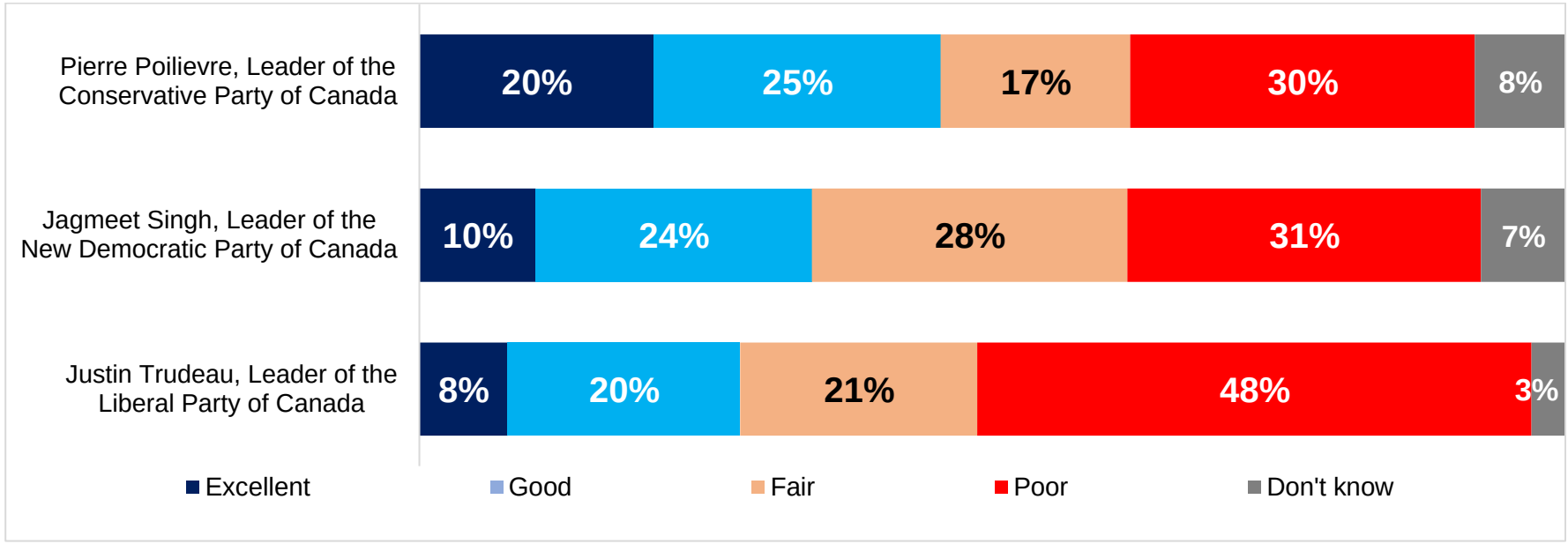
Jagmeet Singh's performance on policy planks and leadership attributes - Outside of Quebec



Once respondents had rated each leader on their performance on each of the policy planks and leadership attributes (grids above), the respondents were asked to rate each leader "overall" (regardless of how they may vote).

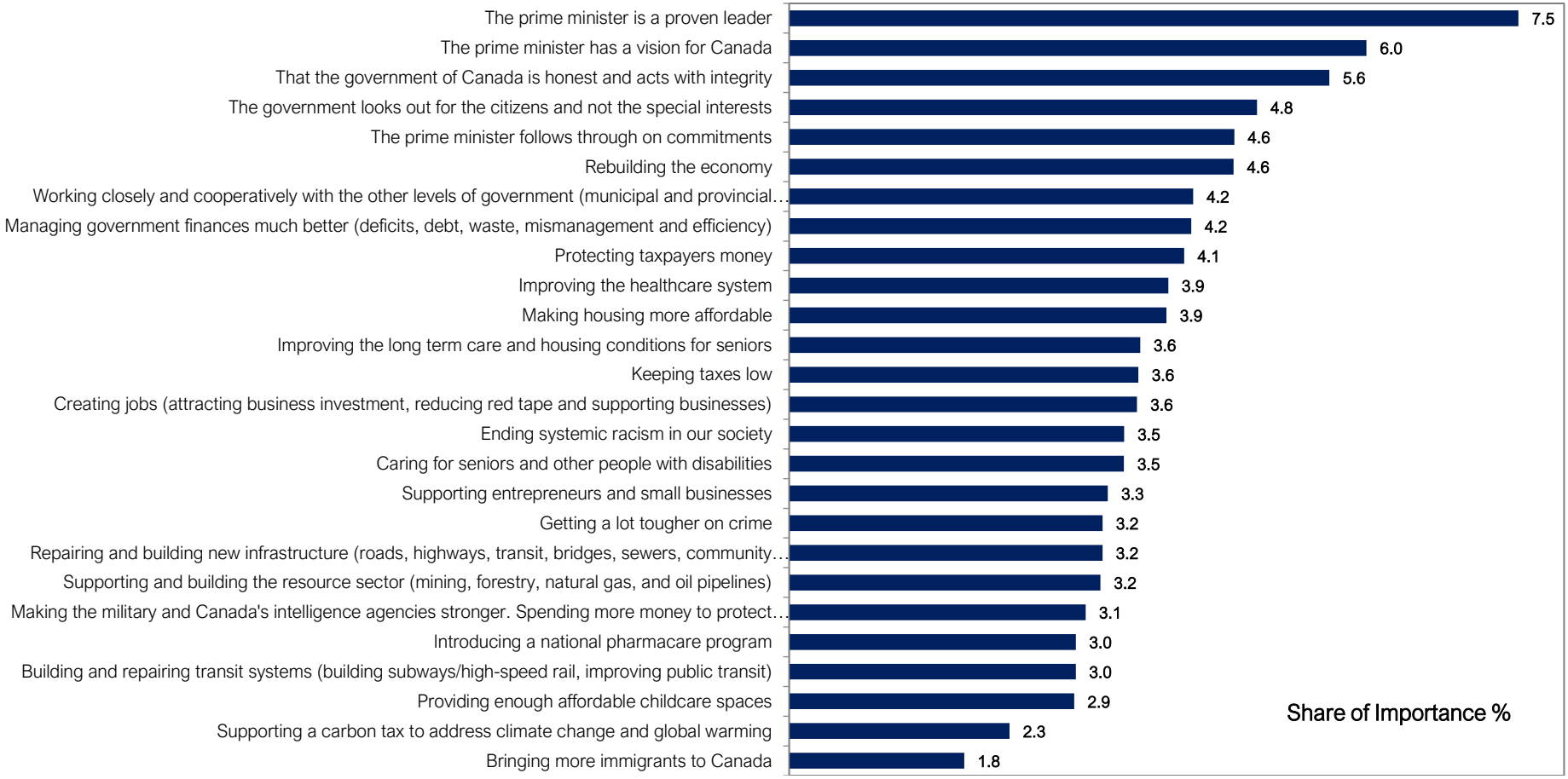
We evaluated correlations between how respondents rated the performance of each leader on each policy plank & leadership attribute with the overall ratings for each leader **to derive the "covert importance" of each policy & leadership attribute**. In other words, the "covert importance" (or "derived importance") determines the actual importance of each policy plank & leadership attribute (what is driving leader ratings).

Overall ratings regardless of how respondents may vote - Outside of Quebec

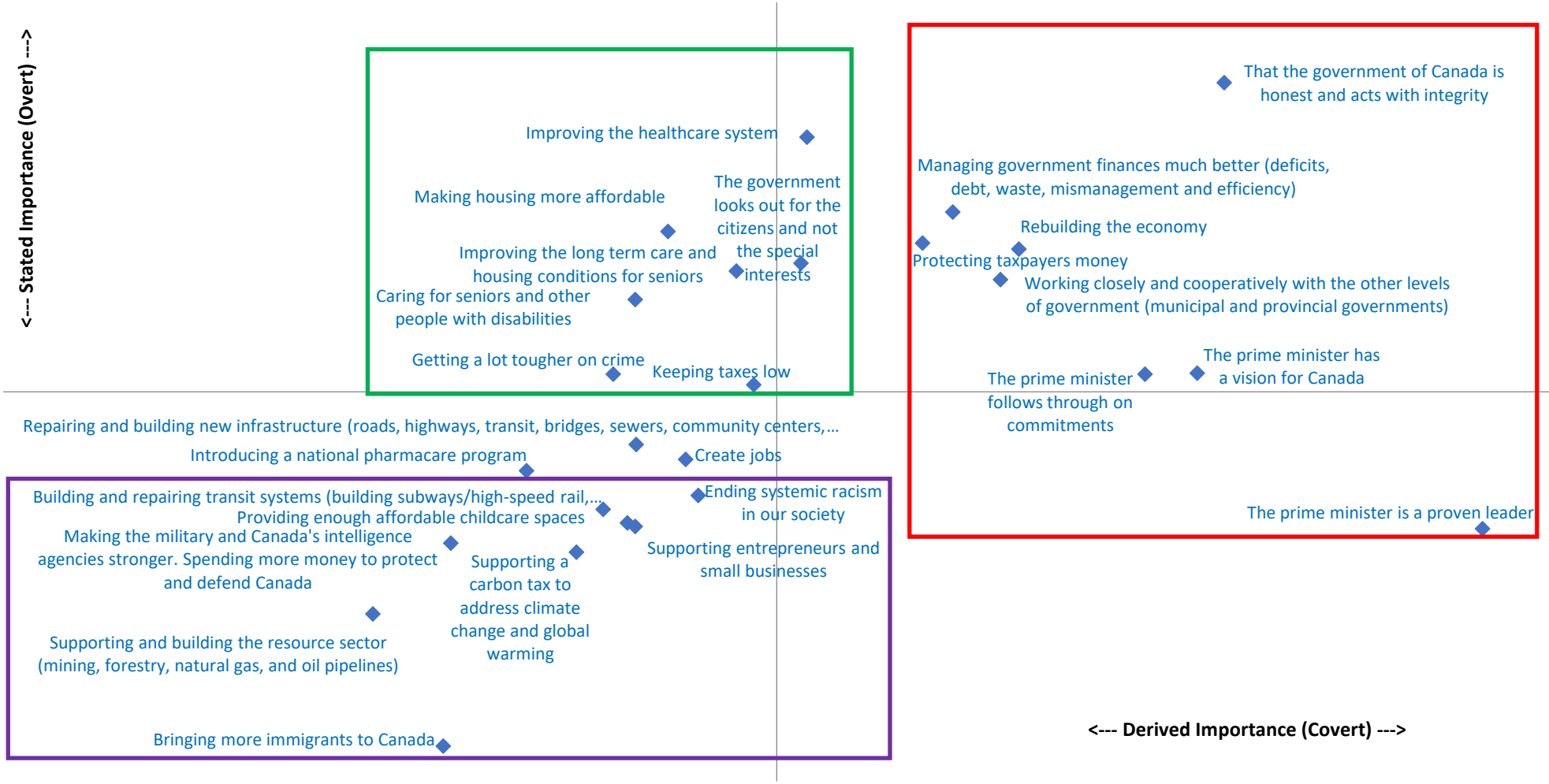


The above allowed for a "Key Drivers" analysis to be developed (you see the "derived importance" incorporated in leader performance ratings grids above, along the X-axis)

Key Driver Analysis - Outside of Quebec



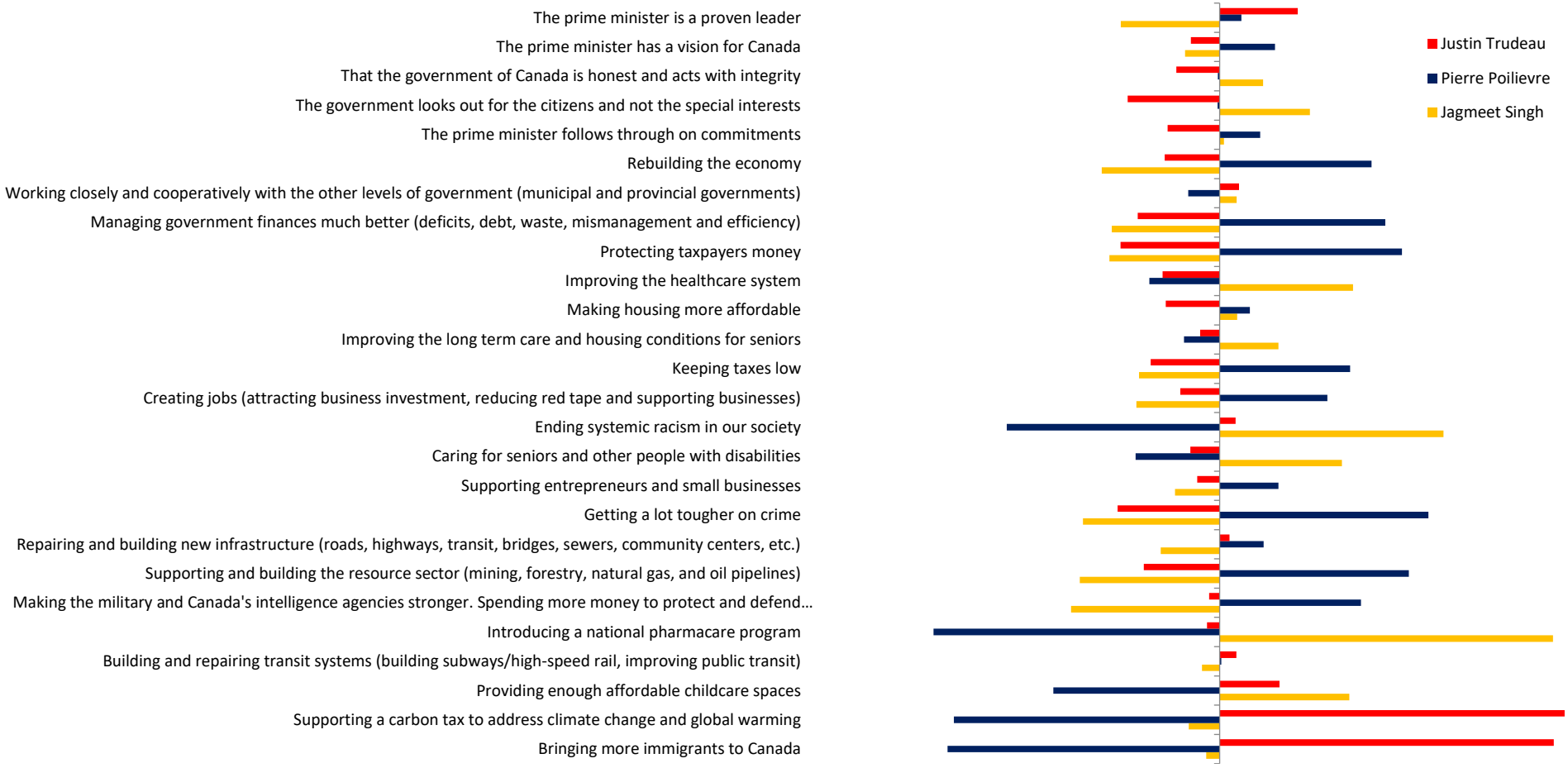
On the next page, "stated importance" is plotted on the Y-axis (top to bottom) and "derived importance" on the X-axis (left to right) for each policy plank & leadership attribute to determine which policy planks & leadership attributes were more important, relative to one another (outside of Quebec).



In the above grid, the higher up (top of the grid) and the further to the right that a policy plank or leadership attribute was, indicated the increased importance of that policy plank or leadership attribute overall. Looking at the policy planks within the **purple rectangle**, the analysis shows that these policy planks are less important than all the other policy planks or leadership attributes from a "stated" perspective (because they are at the bottom of the grid) and less important from a "derived" perspective (because they are furthest to the left on the grid).

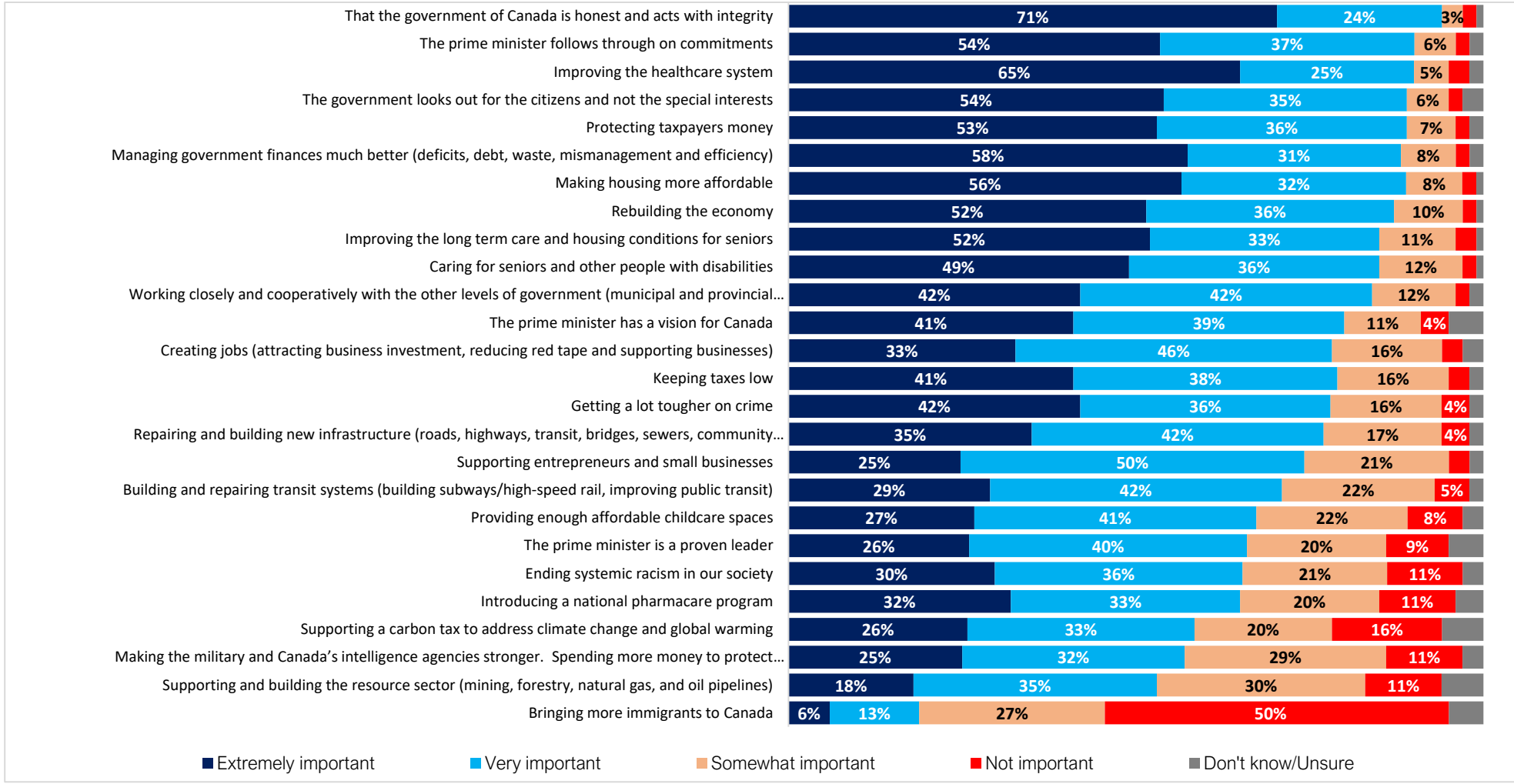
We now gain a better appreciation of the overall importance of the policy planks & leadership attributes as they relate to one another. The **red rectangle** isolates the more important policy planks or leadership attributes, and the **green rectangle** isolates policy planks or leadership attributes that are also considered to be more important relative to the remaining policy planks or leadership attributes**.**

Relative Leadership Strength scores - Outside of Quebec



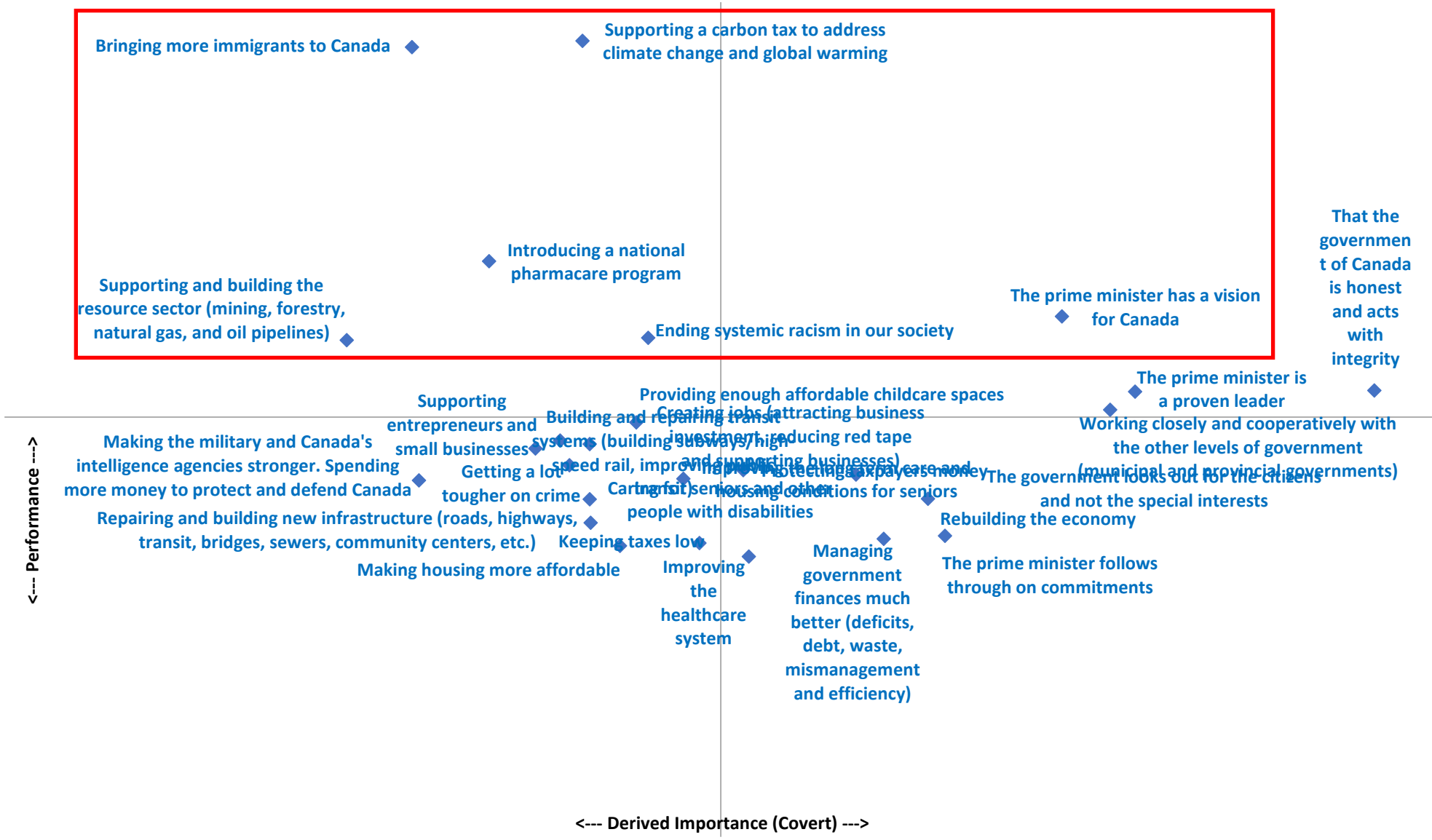
Now, let's take a closer look at Quebec.

Stated Voter Priorities - Quebec

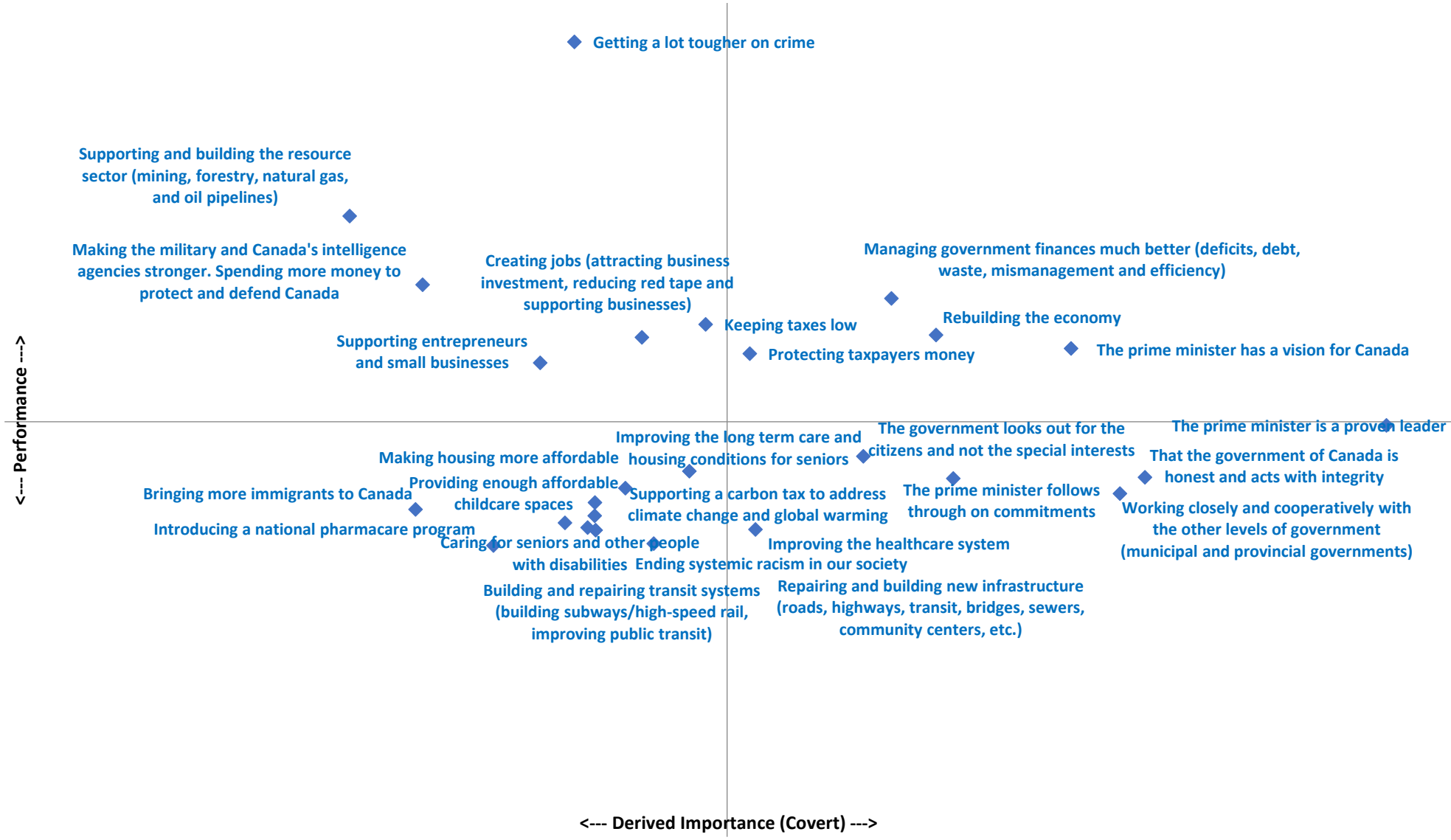


Now, let's look at how respondents rated the performance of each leader (relative only to themselves) on all the policy planks or leadership attributes – Quebec.
Note: We asked respondents to rate the performance of each leader on each policy plank & leadership attribute.

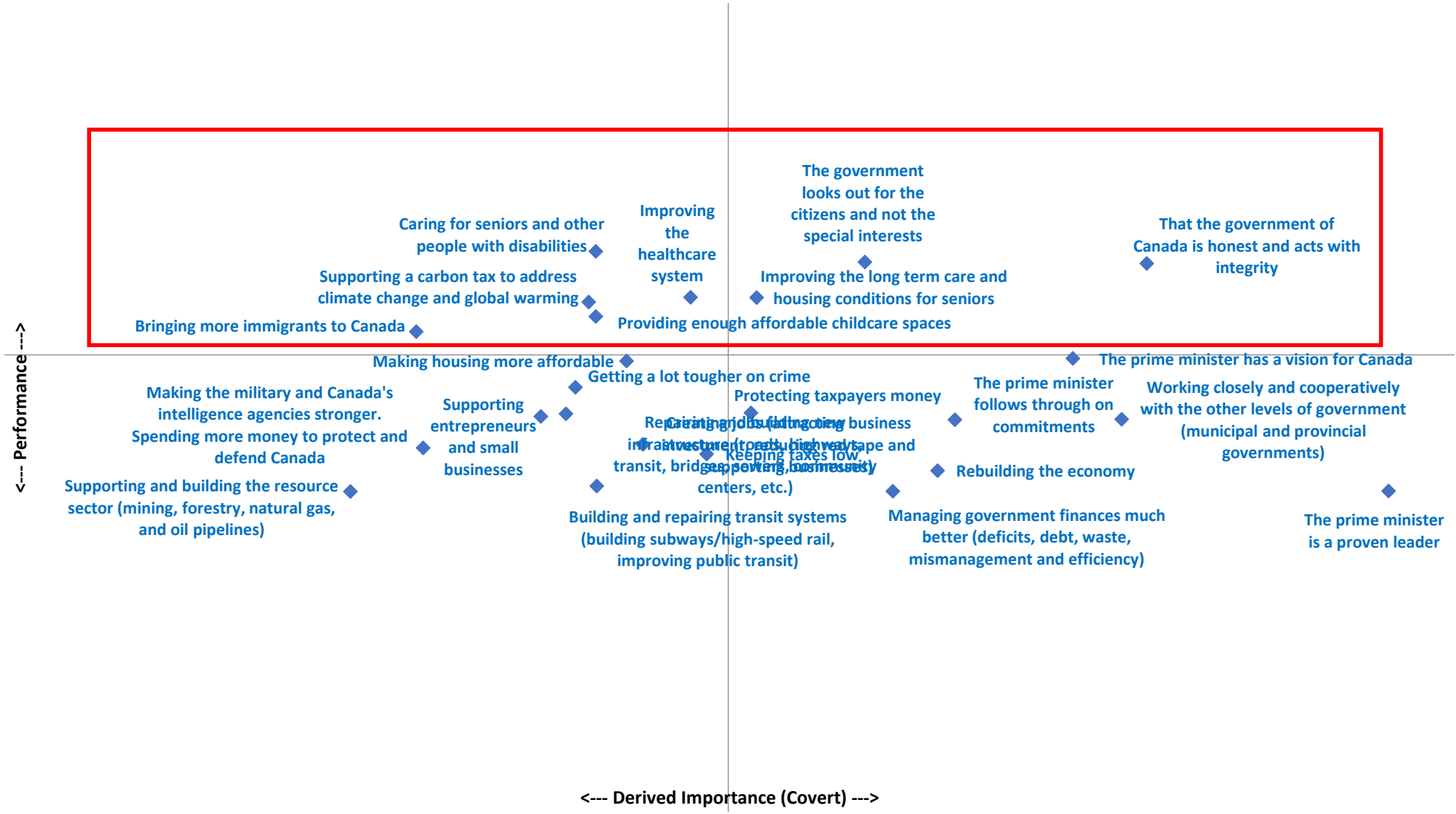
Justin Trudeau's performance on policy planks and leadership attributes - Quebec



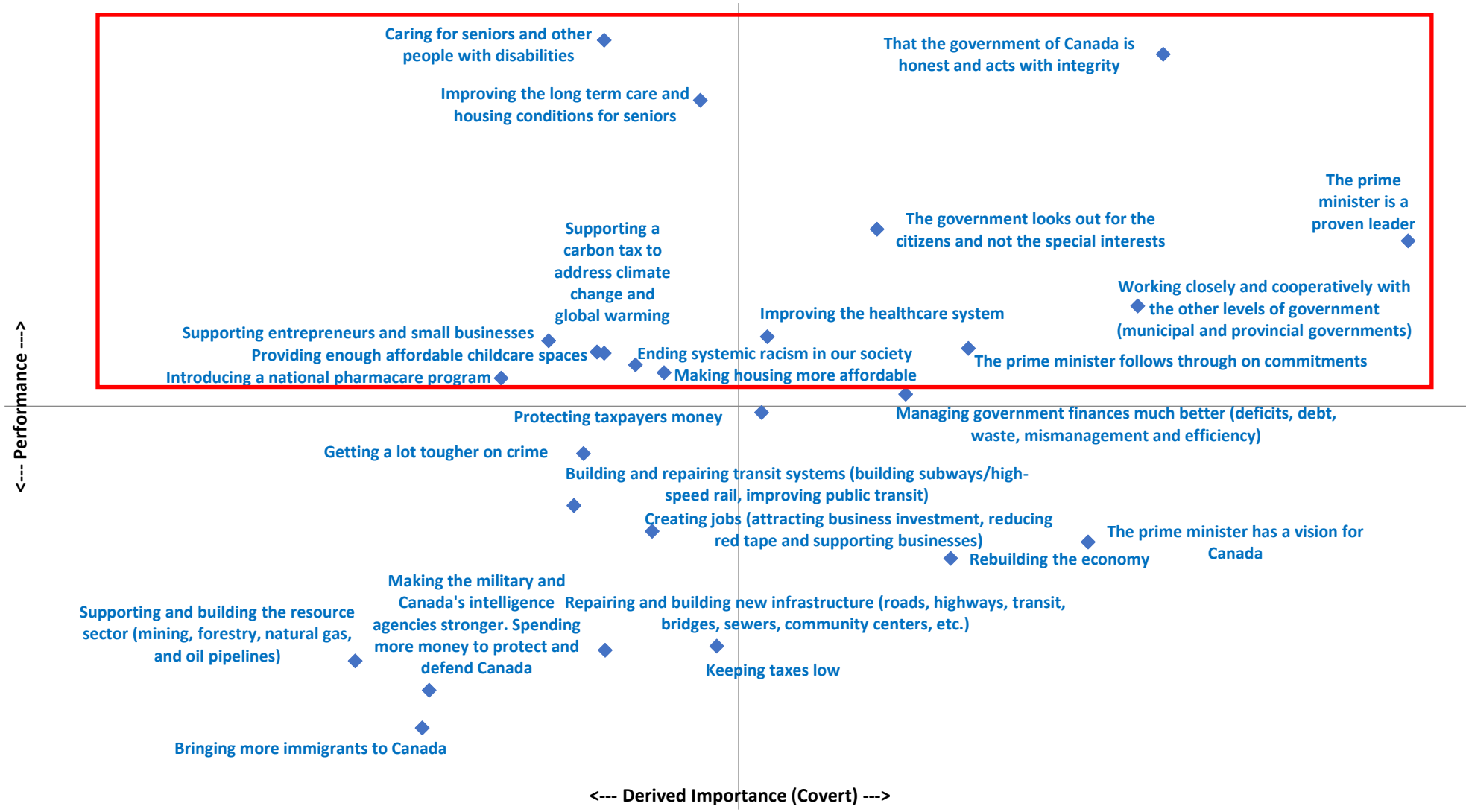
Pierre Poilievre's performance on policy planks and leadership attributes - Quebec



Jagmeet Singh's performance on policy planks and leadership attributes - Quebec



Yves-Francois Blanchet's performance on policy planks and leadership attributes - Quebec



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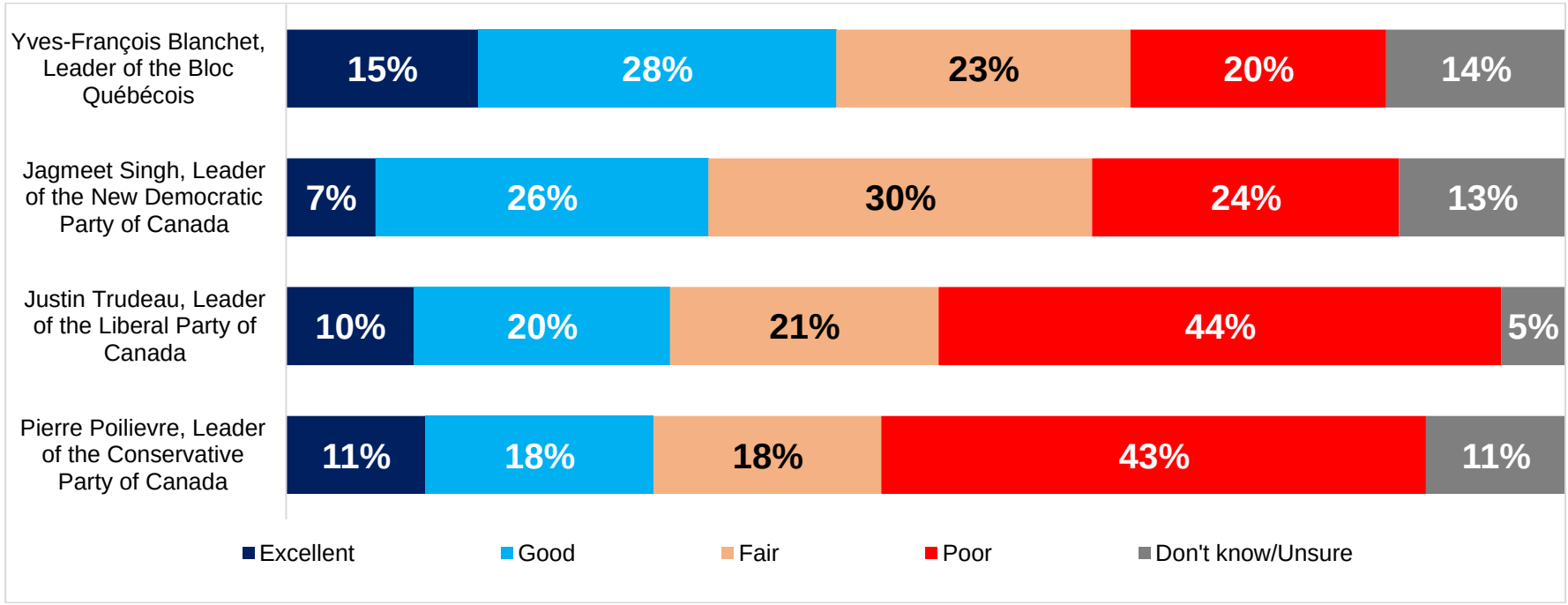
Overall ratings regardless of how respondents may vote (Quebec)



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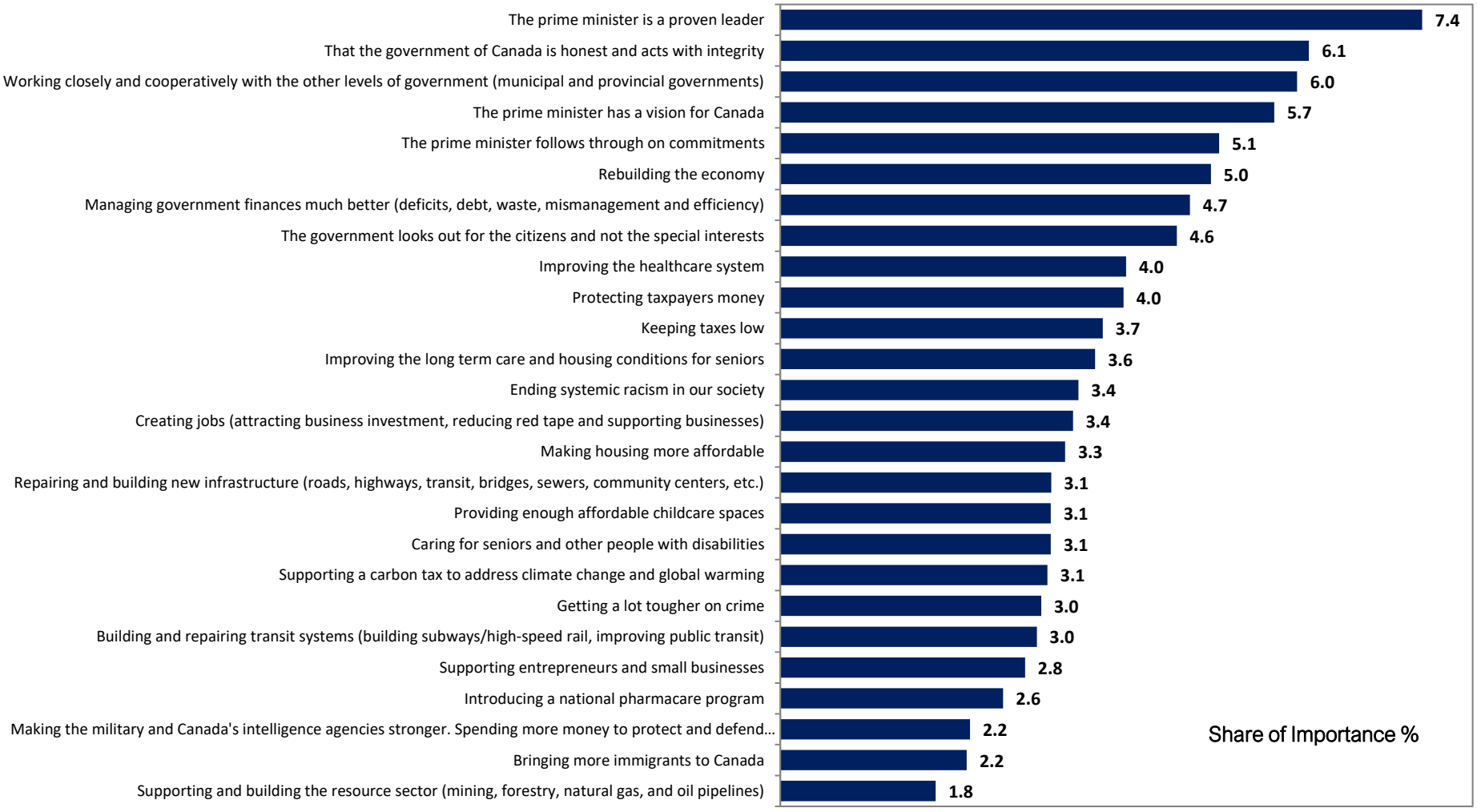
Key Driver Analysis - Quebec



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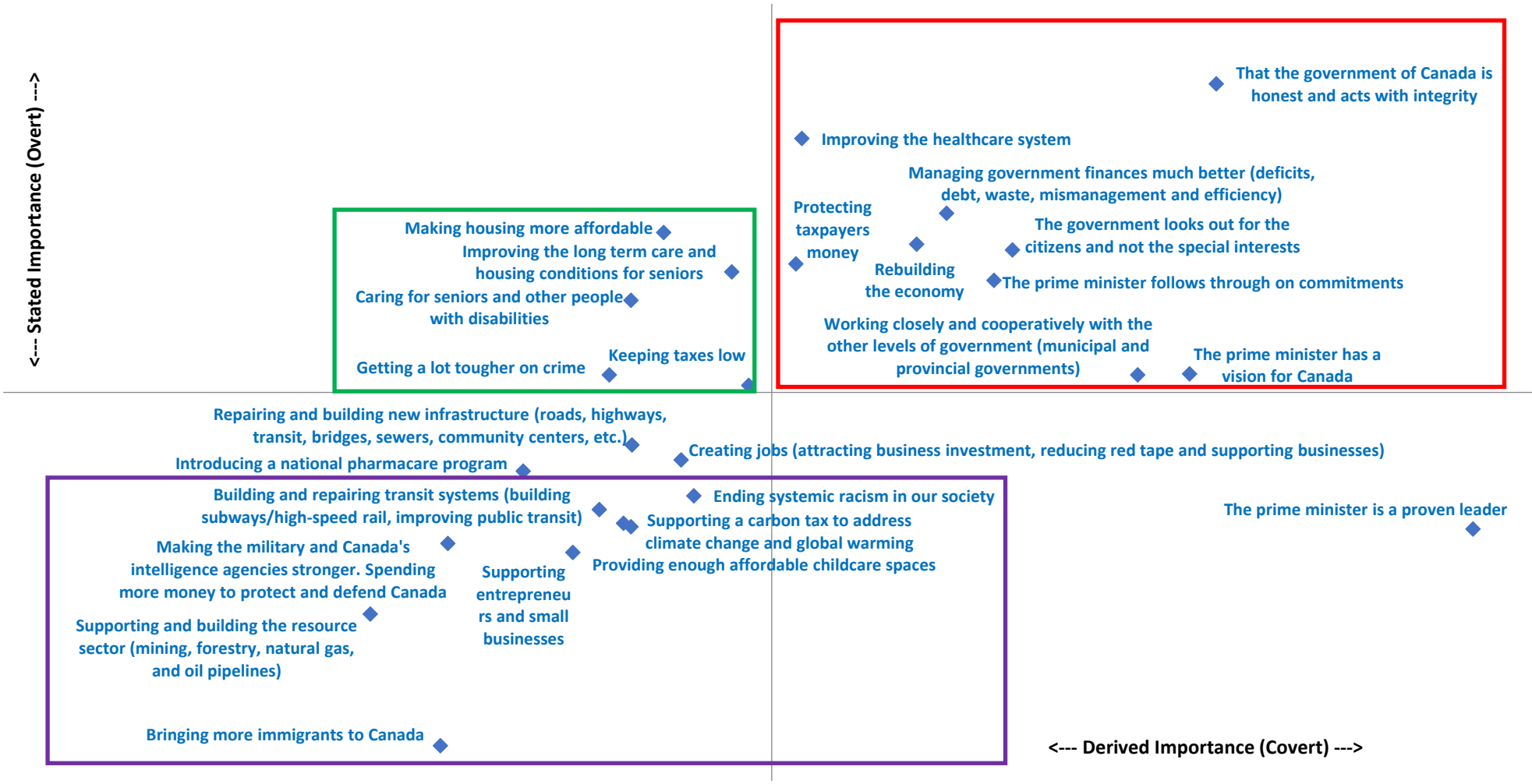

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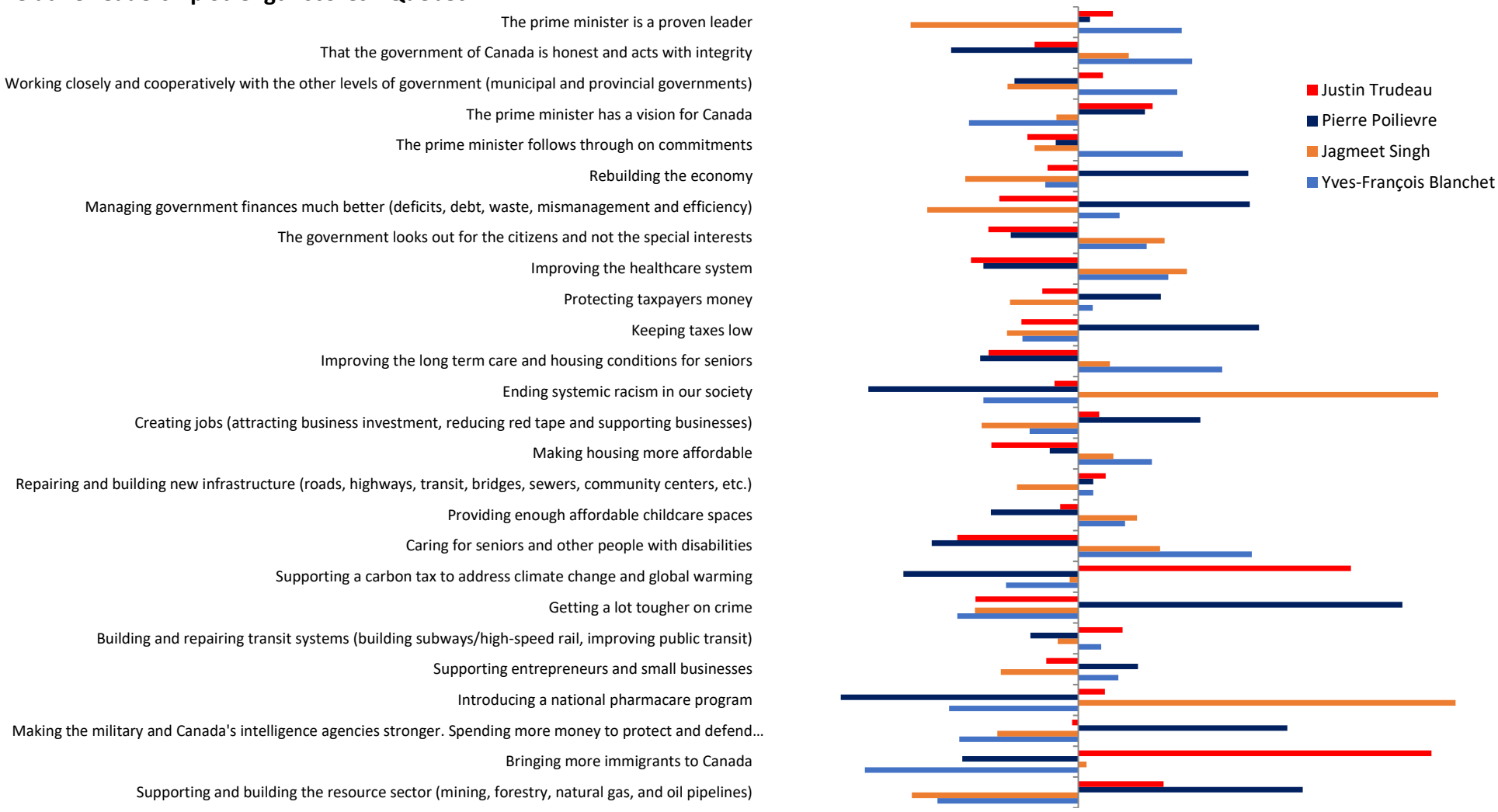
Relative Leadership Strength scores - Quebec



Conclusions/ Summary

Despite Justin Trudeau's mediocre-to-terrible performance on several policy planks and/or leadership attributes that Canadians believed to be very important, the LPC was clearly in 2nd place on the ballot test, 17-points behind the CPC and 6-points ahead of the NDP.

Pierre Poilievre performed well in absolute terms (personal performance grids) and good-to-excellent in relative terms against Justin Trudeau and Jagmeet Singh on many policy planks and/or leadership attributes that Canadians believed to be most important at this time.

Though Jagmeet Singh outperformed Justin Trudeau and Pierre Poilievre on "honesty and integrity" and "looks out for the citizens and not the special interests", his relative performance on "rebuilding the economy", "managing government finances better", "protecting taxpayers money", "keeping taxes low", "creating jobs" and "getting tougher on crime" was equal to Justin Trudeau and terrible compared to Pierre Poilievre's performance on those policy planks and/or leadership attributes.

In Quebec, Yves-Francois Blanchet outperformed all the party leaders on 4 out 5 of the top priorities for Quebecers ("proven leader", "honesty and integrity", "working closely with other levels of government" and "keeping commitments") and that is why the Bloc found themselves at 35% ballot support – 9-points ahead of the LPC and 15-points ahead of the CPC.

Based on the stated priorities of Quebecers and how the Leaders faired against one another (relative leadership strength scores), it is not hard to see how Pierre Poilievre and the CPC could catch the Trudeau LPC on the ballot test in Quebec over the next few months.

Because the NDP find themselves trailing the LPC by 6-points nationally, it would seem likely that Pierre Poilievre and the CPC will have a few more months to grow CPC ballot support in Quebec.

Based on the findings of this study the NDP and/or the LPC will likely find a way to avoid an election over the short-term.

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METHODOLOGY

This study was conducted by Campaign Research between October 8th and 10th, 2024, through an online survey with 5,018 Canadian adults who are members of Maru Blue's online panel and were provided with various incentives to respond. The panelists were selected to reflect Canada's age, gender and regional distributions in line with 2021 Statistics Canada census data.

The results have been weighted by age, gender, and region (and in Quebec, language) to match the population according to 2021 Census data. Certain areas or groups may be oversampled but have been weighted to reflect their proportion of Canada's population. This is to ensure the sample is representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding.