



Political Landscape

An update on the horse race

JULY 2023

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Methodology

- **Field Window:** June 7 to June 23, 2023
- **Sample size:** 7,001 adult (18+) Canadians
- **Reliability (*):** Online surveys cannot be assigned a margin of error. This survey of 7,001 Canadians includes 5,423 decided voters. As a guideline, a probability sample of n = 5,423 carries a margin of error of **± 1.3%, 19 times out of 20.**
- **Weighting:** Data has been weighted using the most current education, gender, age, and region Census data, to ensure the sample reflects the actual population of adult Canadians.

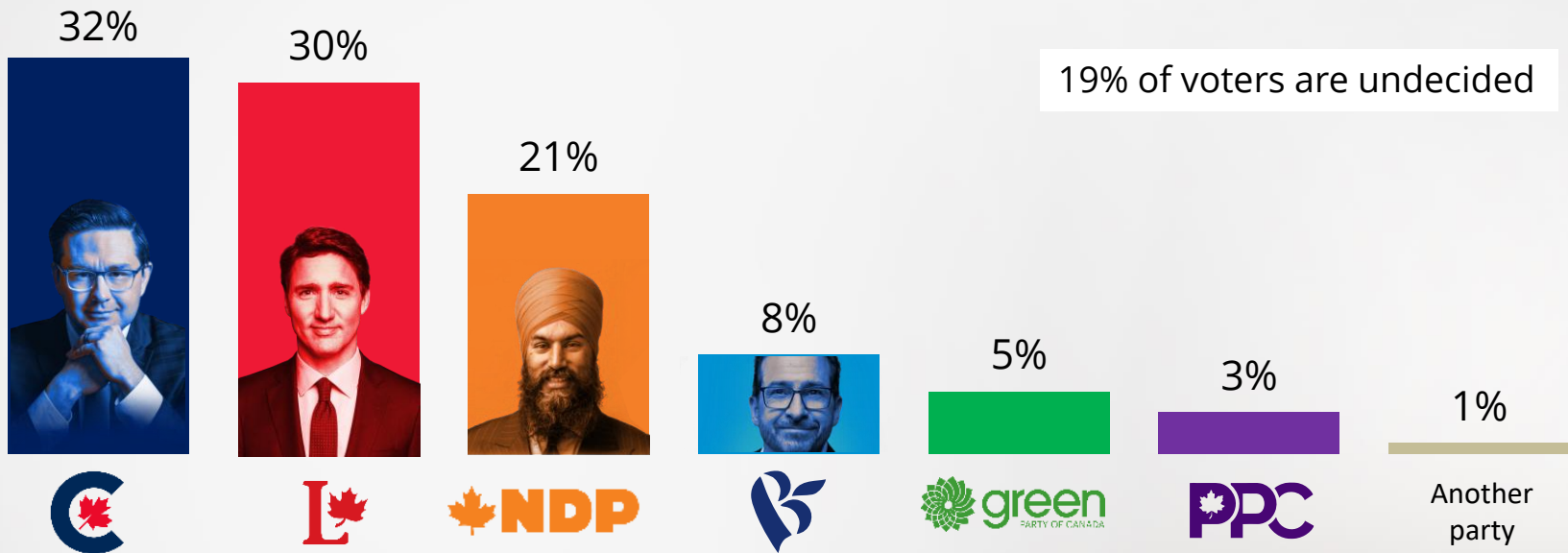
Region	Number of Interviews	Margin of error*
British Columbia	903	± 3.3%
Alberta	802	± 3.5%
Saskatchewan	503	± 4.4%
Manitoba	507	± 4.4%
Ontario	1,819	± 2.3%
Quebec	1,313	± 2.7%
New Brunswick	350	± 5.2%
PEI	152	± 7.9%
Nova Scotia	361	± 5.2%
Newfoundland & Labrador	288	± 5.8%
Canada	7,001	± 1.2%



The State of the Horse Race

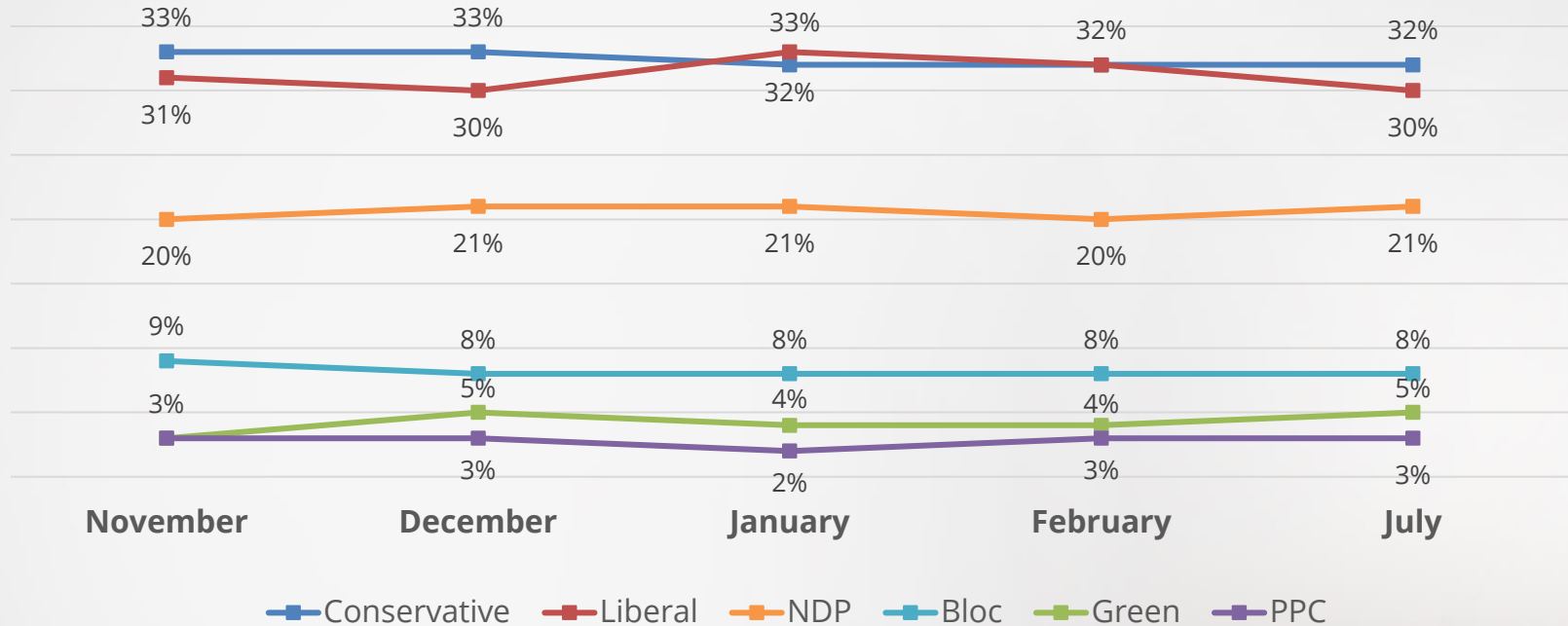
- Support levels are similar to 2021 election results. **The Conservatives lead the Liberals 32% to 30%, with the NDP at 21%.**
 - Support levels have been relatively stable since November, with the Liberals and Conservatives within 3 points of each other every month over this period.
- Though Liberal support is close to 2021 levels, it is sagging more in key electoral markets for them such as Montreal, the Greater Toronto Area, and the BC Lower Mainland.
- The Liberals and Conservatives both have an older skew in their support levels, with the NDP leading among young voters. Liberal support is similar among men and women, with the Conservatives significantly stronger among men and the NDP much stronger among women.
 - Young people do not present as a monolith. While the NDP lead among women under 35, they trail both the Conservatives and Liberals among young men. NDP support is much higher among students, and is lower among young people who have kids and own homes.

Conservatives lead Liberals by 2 points nationally

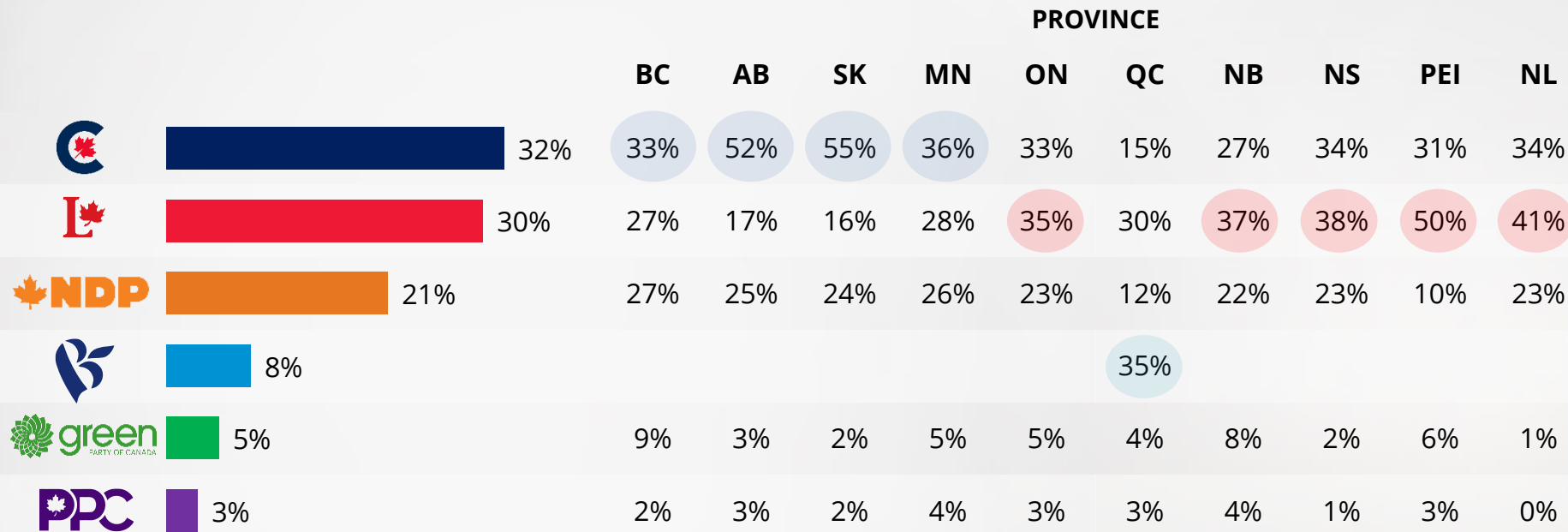


Q If a national federal election were held across Canada today, which party would you most likely vote for, or are you leaning towards?
Base: Decided Voters (n=5,423)

Support levels stable



Liberals lead in Ontario and Atlantic Canada, but Conservatives in front out west



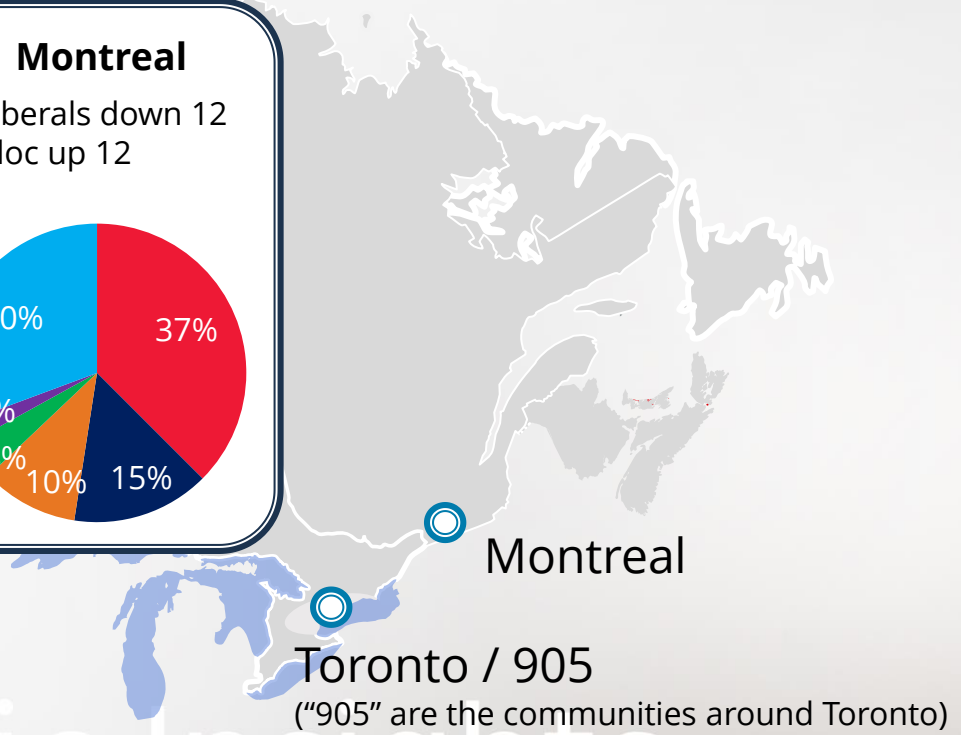
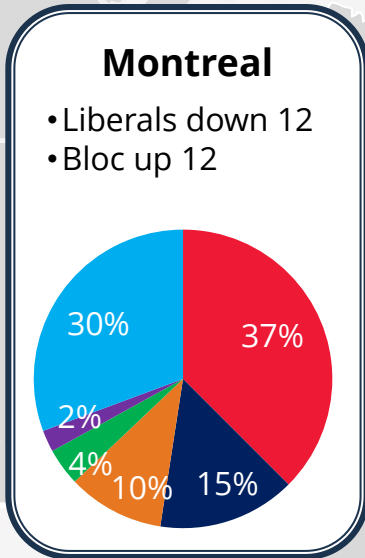
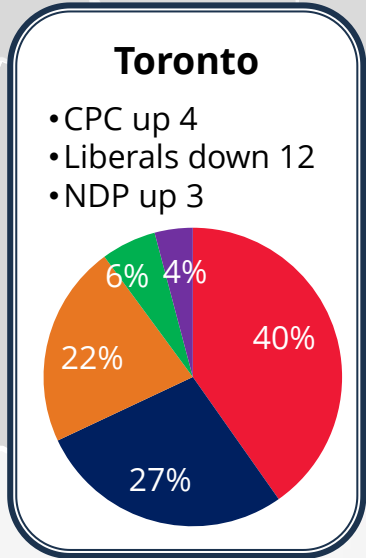
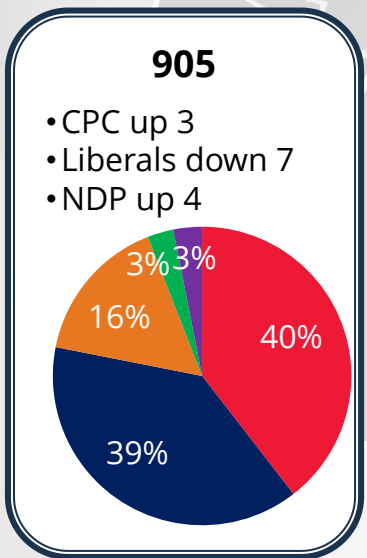
 If a national federal election were held across Canada today, which party would you most likely vote for, or are you leaning towards?

NDP support up from 2021 results in all provinces, except for British Columbia

	Change from 2021	PROVINCE									
		BC	AB	SK	MN	ON	QC	NB	NS	PEI	NL
	-2	--	-3	-4	-3	-2	-4	-7	+5	-1	+1
	-3	--	+1	+6	--	-4	-4	-5	-4	+4	-7
	+3	-2	+6	+3	+3	+5	+2	+10	+1	+1	+6
	--						+3				
	+3	+4	+2	+1	+3	+3	+2	+3	--	-4	+1
	-2	-3	-4	-5	-4	-3	--	-2	-3	--	-2

 If a national federal election were held across Canada today, which party would you most likely vote for, or are you leaning towards?

Liberal support down in their central Canadian strongholds



Base: Toronto (n=404), 905 (n=337), Montreal (n=263)

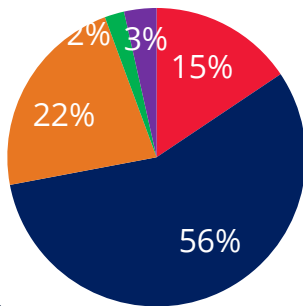
Liberals down in Winnipeg and the Lower Mainland

Edmonton
Lower Mainland
Calgary

Winnipeg

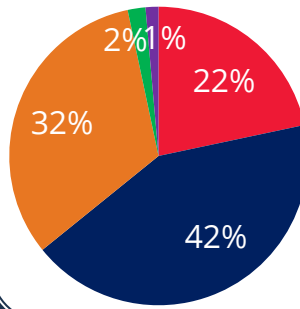
Calgary

- Liberals down 2
- CPC up 4
- NDP up 5



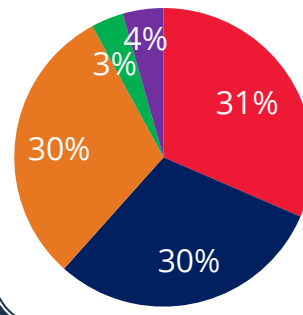
Edmonton

- Liberals up 2
- CPC no change
- NDP up 2



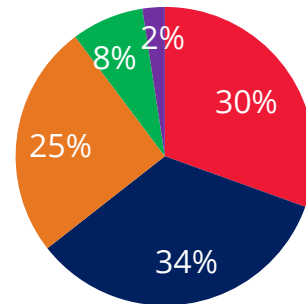
Winnipeg

- Liberals down 6
- CPC up 2
- NDP up 2



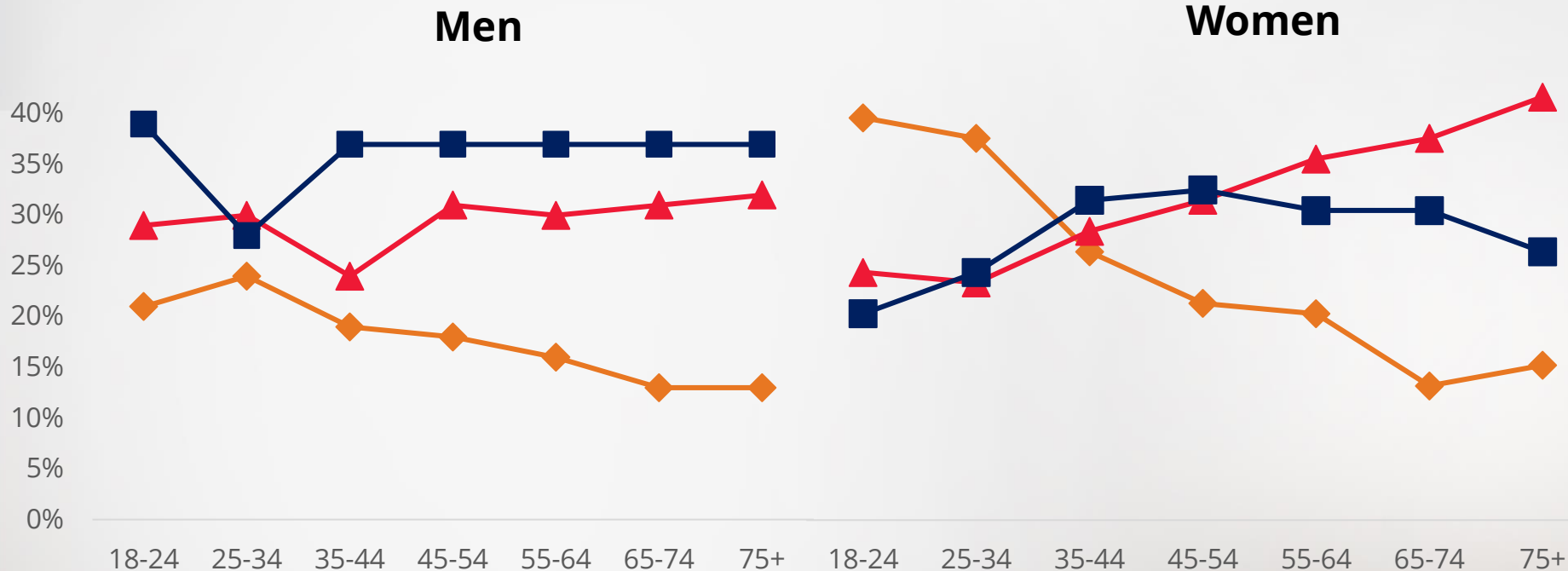
Lower Mainland

- Liberals down 6
- CPC up 5
- NDP down 3



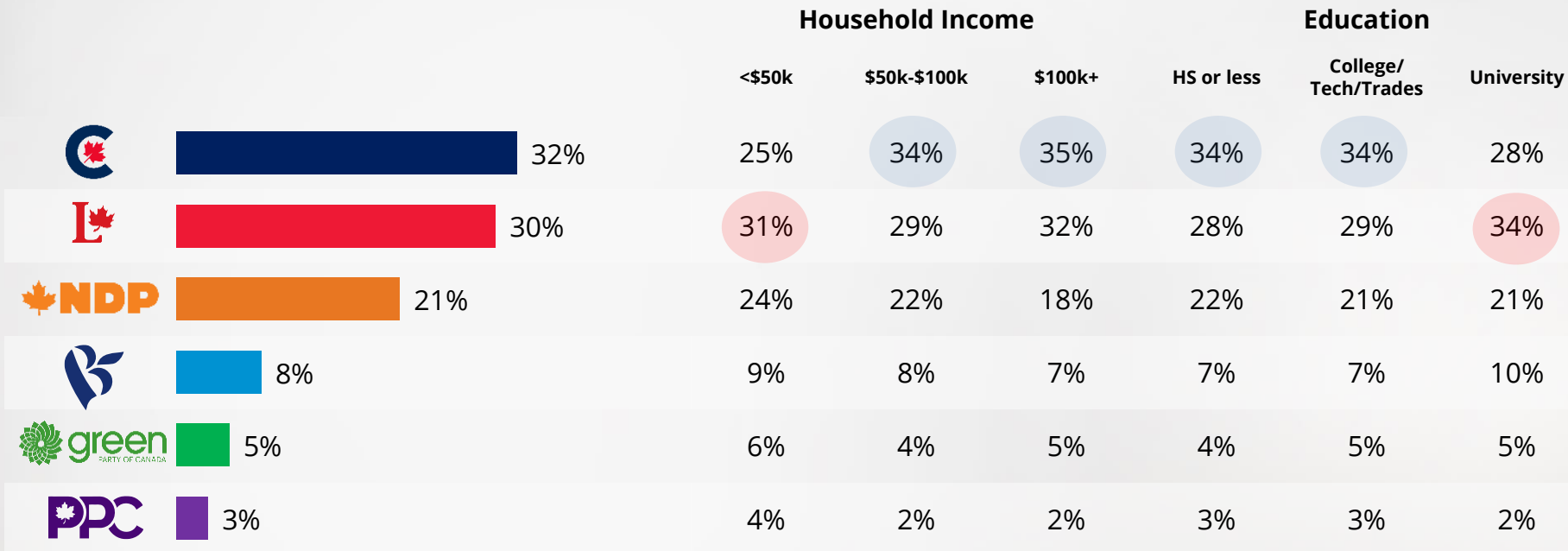
Base: Vancouver (n=441), Calgary (n=224), Edmonton (n=231), Winnipeg (n=240)

Conservatives strongest amongst men, Liberals lead among older women, NDP lead among younger women



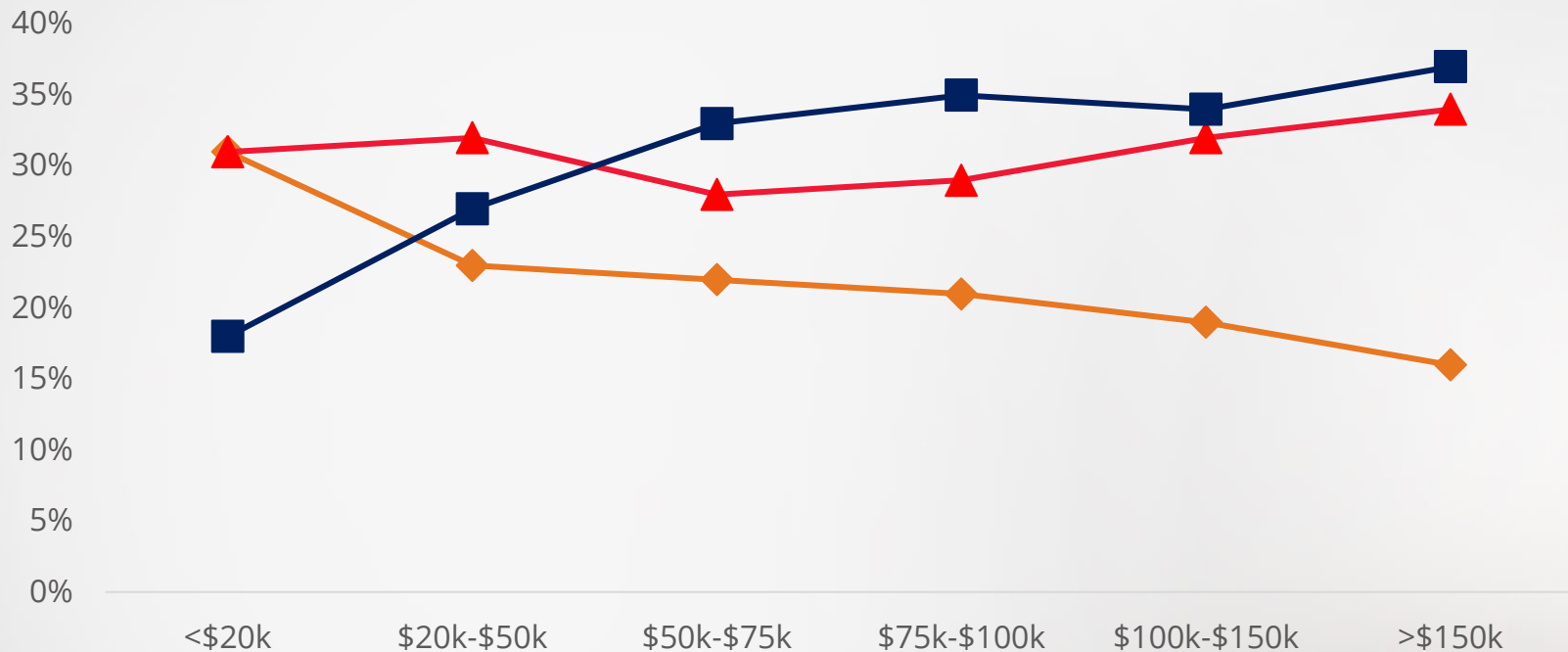
Base: Women (n = 2,627), Men (n = 2,775), 18-24 (n = 530), 25-34 (n = 857), 35-44 (n = 879), 45-54 (n=923), 55-64 (n=952), 65-74 (n=737), 75+ (n=524)

Liberal support higher among university-educated



Base: <\$50k (n = 1,499), \$50k-\$100k (n = 1,962), \$100k+ (n = 1,581),
 HS or less (n = 1,207), College/Tech/Trades (n = 1,708), University (n = 2,465)

Conservative support *increases* with income, NDP support *decreases* with income



Base: <\$20k (n=320), \$20k-\$50k (n=1,179), \$50k-\$75k (n=1,054), \$75k-100k (n=908), \$100k-\$150k (n=1,010), >\$150k (n=571)

Conservatives lead among full-time workers, NDP ahead among unemployed

18-64 YEAR OLDS EMPLOYMENT TYPE



36%

NDP support among students

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Liberals and CPC stronger among young people with home and kids

Young people who are students: % for students - % for non-students



Young people who own a home: % for homeowners - % for non-homeowners



Young people who have kids: % for parents - non-parents



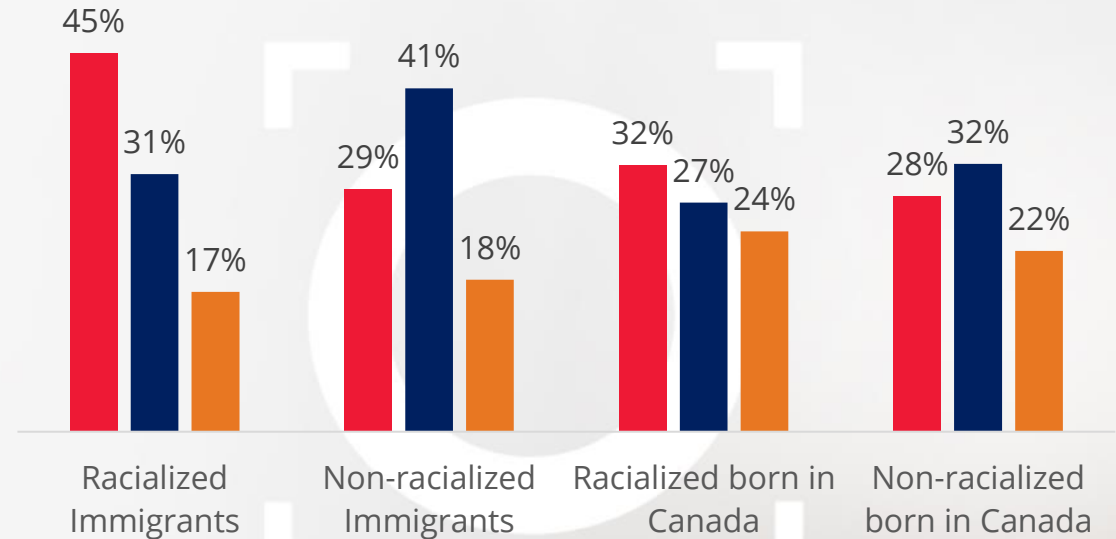
Base: 18-44 (n=2,245),
Students (n=225)
Homeowners (n=1,099)
Parents (n=871)

37%

Liberal support among racialized voters, 9 points higher than their support among other voters

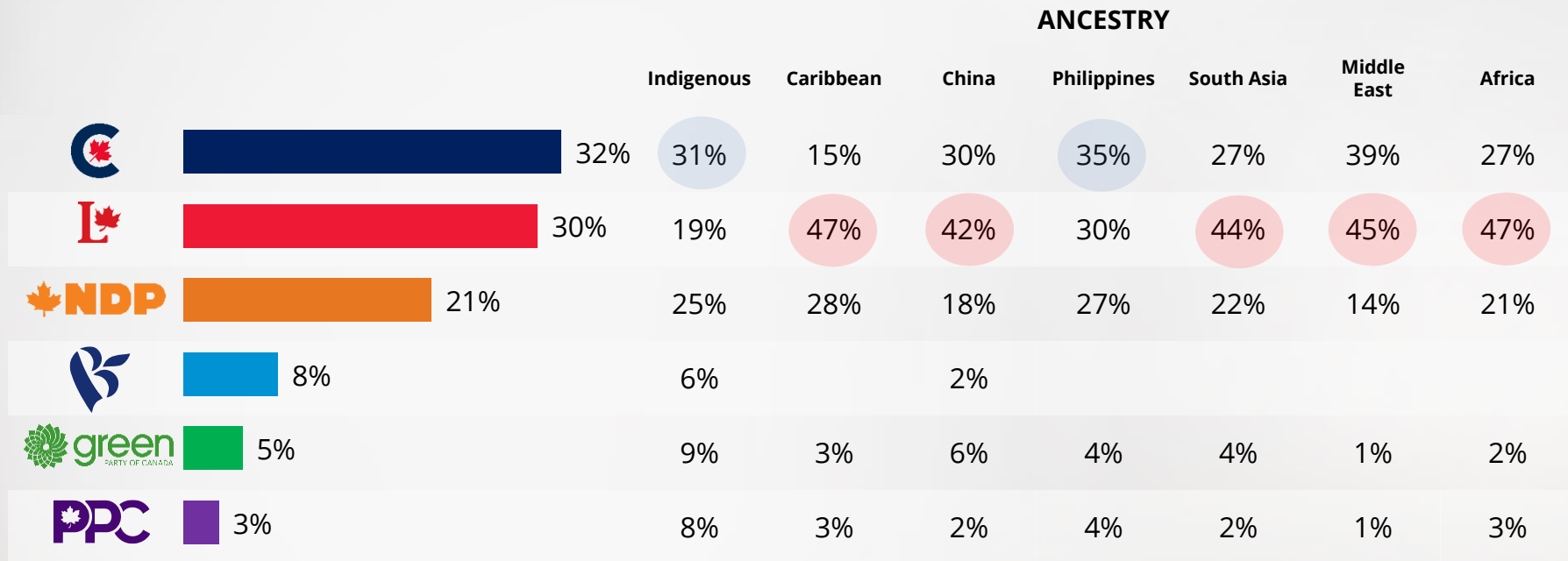
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Liberals significantly ahead among racialized immigrants, but Conservatives lead among non-racialized immigrants



Base: Racialized immigrants (n=471), Non-racialized immigrants (n=331), Racialized born in Canada (n=729), Non-racialized born in Canada (n=3,872)

Liberals lead among most minority groups, but Conservatives have areas of strength



Base: Indigenous (n=298), Caribbean (n=79), China, (n=238), Filipino (n=87), South Asia (n=211), Middle East (n=77), Africa (n=69)



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