Report

2020 Greater Toronto Area/'905' Survey
REPORT

DATE 20-02-26   **PROJECT NUMBER** 45 883-001

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We know Canadians

Methodology

METHODOLOGY

The Clean Prosperity retained Leger Market Research to conduct a web-based survey of the 30 Federal Electoral District Associations (EDAs) that make up the suburban area surrounding Toronto known as the '905'. The primary purpose of this study was to understand how residents felt toward the issue of climate change, with a particular focus on how the issue of climate change influenced their decisions regarding support at the federal political level.

Leger professionals worked with Clean Prosperity in designing the survey instrument. Clean Prosperity provided an initial outline of questions and topic areas for inclusion in the study which Leger crafted into a methodologically sound questionnaire.

An online survey methodology was selected for this study. The survey was programmed on to Leger's secure web survey platform and administered to respondents via an online panel. Due to the size of this survey, two reputable online panel companies supported this study—Leger's LEO panel along with Dynata.

Since the research is conducted online, the sample is considered to be non-probability and therefore, margins of error are not applicable. For comparison purposes only, a probability sample of a survey size of 3,013 cases with this sample plan carries a theoretically confidence interval of approximately +/- 1.9 percent, 19 times out of 20. At the sub-group level, samples of 1000 cases theoretically have a margin of error of +/-3.1% 19 times out of 20.

A pre-test of the survey was conducted January 16th, 2020. After the test, the survey tool was available online from January 16th to February 2, 2020. Quotas were set to ensure survey completions were properly distributed across the 30 EDAs. In addition, gender quotas were set to ensure this demographic group reflected the actual population distribution in the survey area. At the conclusion of fielding, the data was weighted to ensure it accurately reflected the age and gender distribution found in the 905 region based on the most recent Canadian Census data.
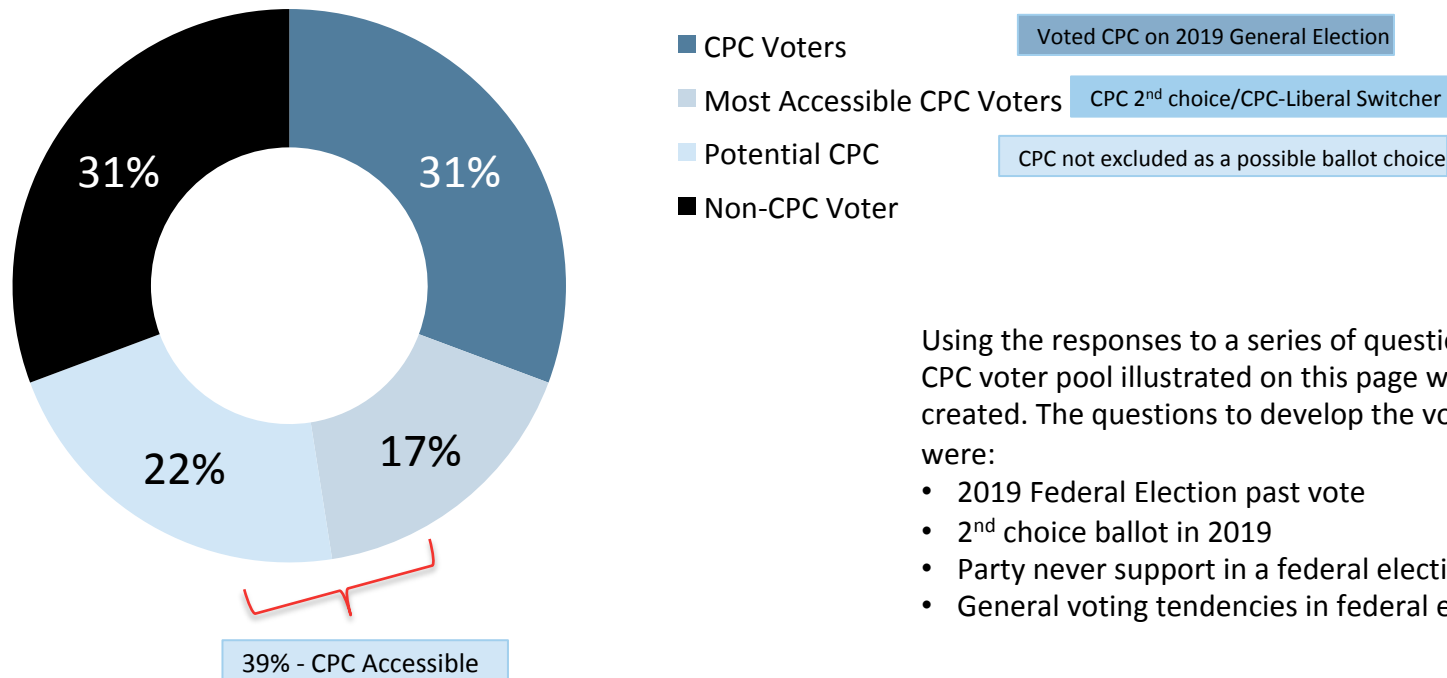
If you have questions about the data presented in this report, please contact **Andrew Enns**, Executive Vice President, at the following email address: aenns@leger360.com.

Conservative Party Voter Pool

CPC Vote Pool

Composite Variable of CPC Supporters and Accessible Voters

Base: All respondents (n=3013)

- CPC Voters
- Most Accessible CPC Voters
- Potential CPC
- Non-CPC Voter

Voted CPC on 2019 General Election

CPC 2nd choice/CPC-Liberal Switcher

CPC not excluded as a possible ballot choice

31% 31% 22% 17% 31%

39% - CPC Accessible

Using the responses to a series of questions, the CPC voter pool illustrated on this page was created. The questions to develop the voter pool were:
- 2019 Federal Election past vote
- 2nd choice ballot in 2019
- Party never support in a federal election
- General voting tendencies in federal elections

Priority Issues

Top of Mind Issue (Un-Aided)

Q1. In your opinion what is the most important issue you think the government in Ottawa should be dealing with these days? This issue you personally have been thinking about most and you think the government in Ottawa should focus on? Please write the issue or issues in the space provide below. Bullet point is fine.

Base: All respondents (n=3013)

Top of Mind Issue (Un-aided)	% of Total	% of CPC Voters	% of Accessible CPC Voters
Weighted n=	3028	931	1172
Unweighted n=	3013	959	1139
The environment/Climate change/Carbon Tax *(positive)*	**15**	5	14
Health care; wait times	10	7	12
Education issues/Teacher's strike	7	4	7
The economy	6	9	6
Debt/Deficit/Govt. spending	6	13	4
Immigration/Refugees	5	10	4
Affordable housing	5	5	4
Taxation/ Carbon Tax *(negative or neutral)*	5	8	4
Wages/Cost of living	4	3	4
Jobs	3	3	3
Public safety/crime/Guns	3	3	4
Social issues (poverty/racism/abortion, equality)	3	2	3
Global issues (trade, Canada's int'l reputation)	2	2	2
Poor government/Dishonest/Accountability	1	2	1
Seniors issues/Pensions/Retirement	1	1	1
Energy, pipelines, natural resources	1	2	1
Other	6	6	7
Don't know/Nothing	15	12	21

Issue From the Last Election – Top Priority

Q6. The government in Ottawa has a number of challenging issues to deal with, some of which are listed below. Please select from the list the issue that for you personally is the most important and should be the top priority for the government in Ottawa to address. This would be the issue that would influences which Party you would support in a federal election. Which would be your second highest priority? Base: All respondents (n=3013)

Issue from the Last Election: Top Priority	% of Total	% of CPC Voters	% of Accessible CPC Voters
Weighted n=	3028	931	1172
Unweighted n=	3013	959	1139
Climate change and its effects in Canada	**23**	7	20
The level of taxes Canadians pay	22	29	23
Growing the economy and creating jobs	18	18	20
Reducing the Government deficits and the size of the Federal debt	11	23	8
Reforming Canada's immigration system	9	14	8
Reducing the cost of prescription drugs with a national pharmacare program	8	5	8
Increasing spaces and reducing the cost for childcare	4	2	5
None of these	5	2	8

Issue From the Last Election – 2nd Priority

Q7. The government in Ottawa has a number of challenging issues to deal with, some of which are listed below. Please select from the list the issue that for you personally is the most important and should be the top priority for the government in Ottawa to address. This would be the issue that would influences which Party you would support in a federal election. Which would be your second highest priority? Base: All respondents (n=2861)

Issue from the Last Election: 2nd Priority	% of Total	% of CPC Voters	% of Accessible CPC Voters
Weighted n=	3028	931	1172
Unweighted n=	3013	959	1139
Growing the economy and creating jobs	**23**	23	23
The level of taxes Canadians pay	20	22	22
Reducing the Government deficits and the size of the Federal debt	13	19	13
Climate change and its effects in Canada	13	9	16
Reducing the cost of prescription drugs with a national pharmacare program	12	9	11
Reforming Canada's immigration system	9	14	7
Increasing spaces and reducing the cost for childcare	6	3	7
None of these	3	2	2

Climate Change & Voting Behaviour

Anxiety over Affects of Climate Change

Q9. Climate change and its effects in Canada and around the world are often talked about in the media and by political leaders. When you hear news and discussion about climate change how worried are you about how this will impact you and your family? Base: All respondents (n=3013)

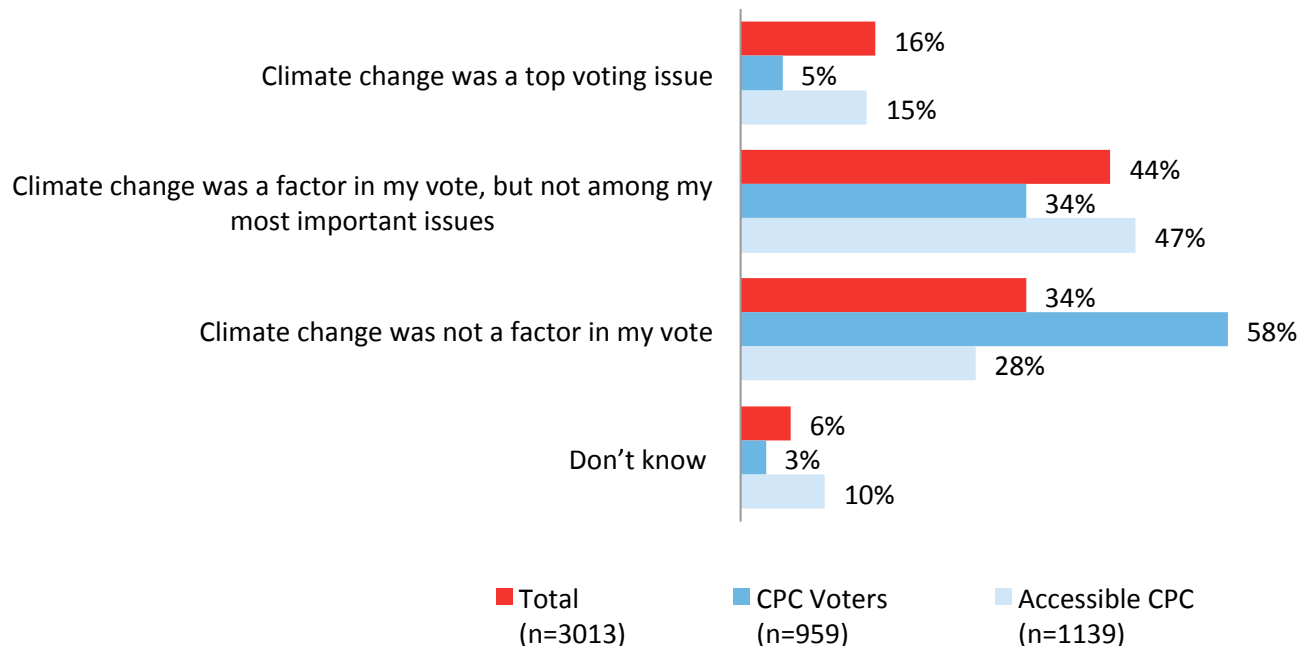| *Impact of Climate Change*	% of Total	% of CPC Voters	% of Accessible CPC Voter
Weighted n=	3028	931	1172
Unweighted n=	3013	959	1139
Very worried	29	13	28
Somewhat worried	44	39	49
Not very worried	15	25	13
Not at all worried	9	21	5
Don't know	2	1	4
Total worried	**73**	**53**	**77**
Total not worried	**24**	**46**	**18**

Climate Change and Support for a Political Party

Q10. Do you agree or disagree with the following statement: *I cannot vote for a federal political party unless they have a strong plan for addressing climate change.* Base: All respondents (n=3013)

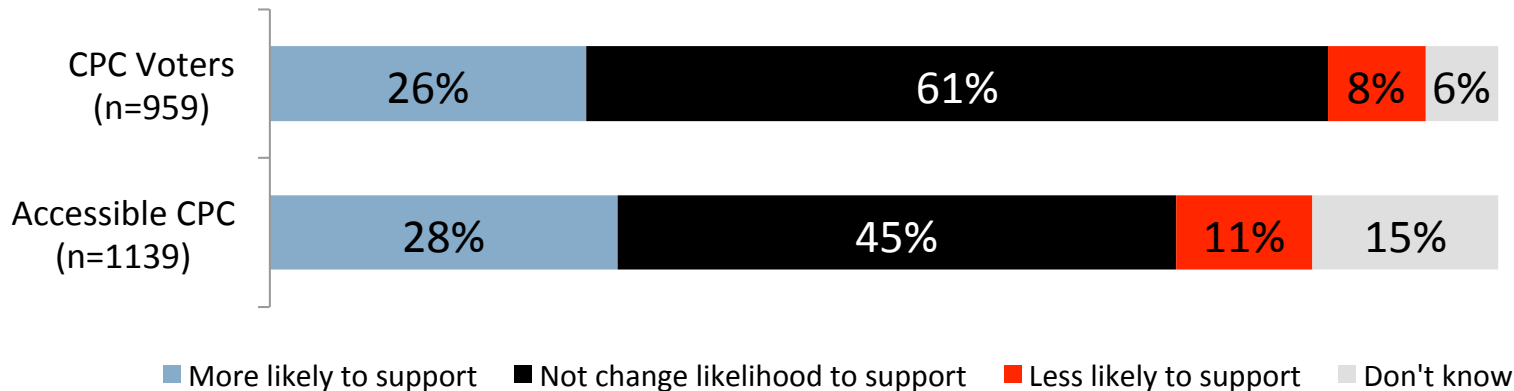| _Voting for a Political Party having a Strong Plan for Climate Change_	% of Total	% of CPC Voters	% of Accessible CPC Voters
Weighted n=	3028	931	1172
Unweighted n=	3013	959	1139
Strongly agree	21	6	19
Somewhat agree	40	31	44
Somewhat disagree	16	29	12
Strongly disagree	17	28	14
Don't know	7	6	11
Total agree	**61**	**37**	**63**
Total disagree	**33**	**57**	**25**

Impact of Climate Change on Voting in the 2019 Federal Election

Q11. Which of the following statements is closest to describing how climate change impacted your vote in the 2019 federal election, even if none of them are exactly how you feel. Base: All respondents (n=3013)

Climate change was a top voting issue
- Total: 16%
- CPC Voters: 5%
- Accessible CPC: 15%

Climate change was a factor in my vote, but not among my most important issues
- Total: 44%
- CPC Voters: 34%
- Accessible CPC: 47%

Climate change was not a factor in my vote
- Total: 34%
- CPC Voters: 58%
- Accessible CPC: 28%

Don't know
- Total: 6%
- CPC Voters: 3%
- Accessible CPC: 10%

Legend:
- ■ Total (n=3013)
- ■ CPC Voters (n=959)
- ■ Accessible CPC (n=1139)

Implications for CPC Support with a Credible Climate Change Plan

Q12. There was some discussion after the last election that the Conservative Party of Canada lacked a credible climate change plan. Would you have been more likely or less likely to support the Conservative Party if they had a credible, scientifically supported climate change policy? Base: CPC Supporters & Accessible CPC (n=2098)

CPC Voters (n=959): More likely to support 26%, Not change likelihood to support 61%, Less likely to support 8%, Don't know 6%

Accessible CPC (n=1139): More likely to support 28%, Not change likelihood to support 45%, Less likely to support 11%, Don't know 15%

Legend: More likely to support | Not change likelihood to support | Less likely to support | Don't know

By about a 3 to 1 margin, CPC voters or Accessible CPC respondents say they would have more likely supported the Party in the last federal election if it had a credible climate change policy.

Key Findings

KEY FINDINGS

A key objective of this study was to understand the importance of climate change for '905' area voters and specifically how this issue impacted how they considered the Conservative Party as a ballot choice in the last federal election. To assist with understanding how climate change affected the CPC ballot in the last election, respondents were organized into two sub-groups: CPC Voters (a past CPC voter in 2019) and Accessible CPCs (CPC 2nd choice, CPC-Lib switchers and those who did not rule out voting CPC in an election).

This study provides evidence that climate change was and continues to be a significant issue for residents of the Ontario '905' region. On an un-aided, top-of-mind basis, the *environment/global warming/climate change* wis the most frequently noted issue. This issue accounted for 15% of all responses, well ahead of *healthcare* (10%) and *education* (7%).

When presented the list of top issues from the last federal election campaign, respondents to our survey most often selected *climate change* (23% of selections), closely followed by *taxation* (22%) and *growing the economy* (18%).

While climate change is not the runaway top priority issue, it is clearly an issue that residents are thinking about. When asked where climate change ranked as a vote determining issue, 16% of 905 residents say it was their *top issue* when deciding who to vote for. Forty-four percent of respondents said climate change *was a factor influencing their vote in 2019, but not the most important issue*. Noteworthy is that 47% of the Accessible CPC population said that climate change *was a factor in influencing their vote in 2019, but not the most important one* and another 16% said it was their *top issue*.

Perhaps most significant for the Conservative Party are the findings to the question, *Would you have been more likely or less likely to support the Conservative Party if they had a credible, scientifically supported climate change policy?* 28% of the Accessible CPC population say they would be <u>more likely</u> to support the CPC. In contrast, only 11% of CPC Accessible respondents say they would be less likely to support the Party. A credible policy on climate change would have been a NET vote winner for the CPC in the 905 region of Ontario.

Appendix- Sample Profile

SURVEY RESPONDENT PROFILE *(Unweighted & Weighted)*

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Variable	Unweighted #	Weighted #	Variable	Unweighted #	Weighted #
Gender			**Household Income**		
Male	1433	1453	Under $60k	720	726
Female	1576	1570	$60k to $100k	845	858
Age			$100k plus	1103	1099
18-34	672	843			
35-54	1132	1147	**Education**		
55+	1209	1039	High school or less	370	362
Origin of Birth			Some post-secondary	519	515
Born in Canada	2065	2060	Secondary degree/diploma	1553	1580
Outside of Canada	923	938	Post Graduate degree	539	536

OUR SERVICES

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  Panel management

- **Leger Communities**
  Online community management

- **Leger Digital**
  Digital strategy and user experience

- **International Research**
  Worldwide Independent Network (WIN)

600
EMPLOYEES

185
CONSULTANTS

8
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QUEBEC CITY | TORONTO | VANCOUVER | WINNIPEG

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OUR CREDENTIALS

Leger is a member of the Canadian Research Insights Council (CRIC), the industry association for the market/survey/insights research industry.

Leger is a member of ESOMAR (European Society for Opinion and Market Research), the global association of opinion polls and marketing research professionals. As such, Leger is committed to applying the international ICC/ESOMAR code of Market, Opinion and Social Research and Data Analytics.

Leger is also a member of the Insights Association, the American Association of Marketing Research Analytics.

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