Impact of Conservative leadership outcome

National survey released May, 2017 Project 2017-1031

THE GLOBE AND MAIL* (n) NANOS SURVEY



Bernier, Raitt, Chong not great in terms of draw but do comparatively better at attracting the potential support of Canadians to the Conservative Party than rest of field

Only a minority of Canadians see their likelihood of voting Conservative increasing with the election of any of the current batch of Conservative Party contenders. Those who fared least poorly, although still net negative in their appeal were Maxime Bernier, Lisa Raitt or Michael Chong.

- Nearly a third of Canadians would be more likely or somewhat more likely to vote conservative if Maxime Bernier were the leader Nearly a third of Canadians would be more likely (15%) or somewhat more likely (15%) to vote for the CP if Maxime Bernier were the leader. Half say they would be somewhat less likely (nine per cent) or less likely (41%), while 21 per cent are unsure.
- More than a quarter of Canadians would be more likely or somewhat more likely to vote conservative if Lisa Raitt were the leader Over a quarter of Canadians would be more likely (11%) or somewhat more likely (15%) to vote for the CP if Lisa Raitt were the leader. Just under half say they would be somewhat less likely (10%) or less likely (38%), while 27 per cent are unsure.
- Almost a quarter of Canadians would be more likely or somewhat more likely to vote conservative if Michael Chong were the leader Nearly a quarter of Canadians would be more likely (11%) or somewhat more likely (12%) to vote for the CP if Michael Chong were the leader. Fewer than half say they would be somewhat less likely (nine per cent) or less likely (37%), while 31 per cent are unsure.
- Nearly half of Canadians would be less likely or somewhat less likely to vote conservative if Andrew Scheer were the leader Almost half say they would be somewhat less likely (nine per cent) or less likely (39%) to vote for the CP if Andrew Scheer were the leader. Sixteen per cent of Canadians would be more likely (nine per cent) or somewhat more likely (seven per cent), while 35 per cent are unsure.
- Almost half of Canadians would be less likely or somewhat less likely to vote conservative if Erin O'Toole were the leader Almost half say they would be somewhat less likely (eight per cent) or less likely (40%), to vote for the CP if Erin O'Toole were the leader. Sixteen per cent of Canadians would be more likely (seven per cent) or somewhat more likely (nine per cent), while 36 per cent are unsure.
- Almost two in three Canadians would be less likely or somewhat less likely to vote conservative if Kellie Leitch were the leader Almost two thirds say they would be somewhat less likely (six per cent) or less likely (58%) to vote for the CP if Kellie Leitch were leader. Over one in ten Canadians would be more likely (seven per cent) or somewhat more likely (six per cent), while 23 per cent are unsure.

These observations are based on an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between May 24th and 25th, 2017 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

Readers should note that this survey was of Canadian voters and not Conservative Party of Canada members.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.





> Appeal to voters at a glance

Candidate	Net Score
Maxime Bernier	-20.4
Lisa Raitt	-21.5
Michael Chong	-23.2
Andrew Scheer	-31.7
Erin O'Toole	-32.2
Kellie Leitch	-51.3

Likelihood of voting for Conservative Party dependent on leader [All Canadians—Likely and somewhat likely]

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Maxime Bernier



29.4%

Lisa Raitt



25.9%

Michael Chong



22.7%

Andrew Scheer



16.6%

Erin O'Toole



16.1%

Kellie Leitch



12.8%

Top 3 leaders that increase likelihood of voting for Conservative per region

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey. May 24th to 25th =1000, accurate 3.1 percentage points plus or minus, 19 times out of 20. The Territories British **Michael Chong** Columbia **Lisa Raitt Maxime Bernier** The Prairies Quebec Ontario **Atlantic Canada Maxime Bernier Lisa Raitt** Lisa Raitt **Maxime Bernier Andrew Scheer Maxime Bernier Michael Chong Michael Chong Maxime Bernier Kellie Leitch**

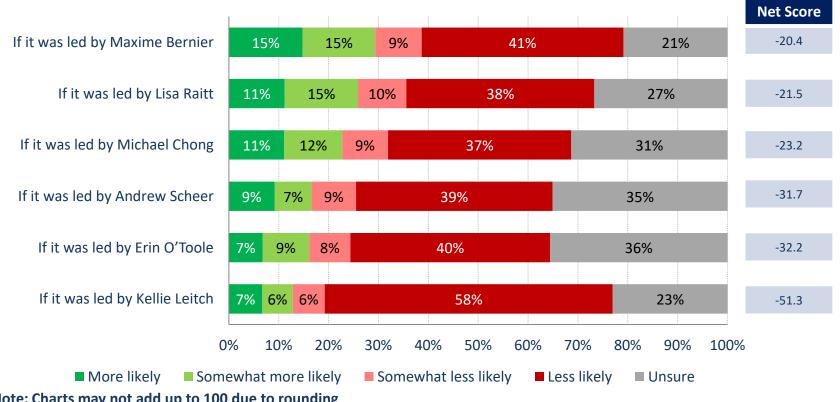
QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

Lisa Raitt

Lisa Raitt

Likelihood of voting for Conservative Party dependent on leader

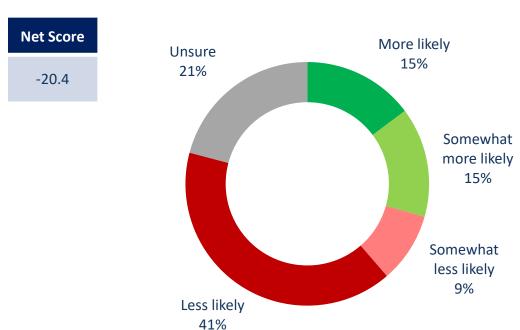
Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



*Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Maxime Bernier

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	More likely/ Somewhat more likely					
Atlantic (n=100)	23.5%					
Quebec (n=250)	30.2%					
Ontario (n=300)	30.4%					
Prairies (n=200)	38.8%					
British Columbia (n=150)	17.4%					
Male (n=501)	37.2%					
Female (n=499)	22.0%					
18 to 29 (n=172)	27.6%					
30 to 39 (n=148)	27.5%					
40 to 49 (n=192)	33.8%					
50 to 59 (n=204)	27.1%					
60 plus (n=284)	30.4%					

QUESTION - The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

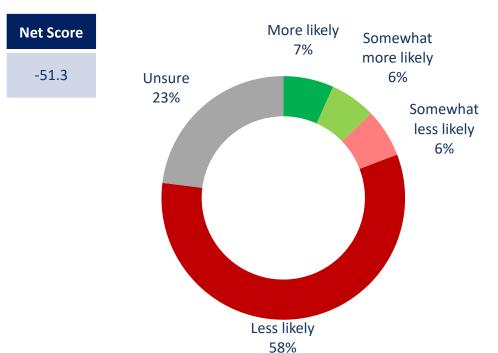
If it was led by Maxime Bernier.



^{*}Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Kellie Leitch

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20



Subgroups	More likely/ Somewhat more likely					
Atlantic (n=100)	7.3%					
Quebec (n=250)	13.2%					
Ontario (n=300)	10.7%					
Prairies (n=200)	20.2%					
British Columbia (n=150)	10.3%					
Male (n=501)	15.9%					
Female (n=499)	10.0%					
18 to 29 (n=172)	13.6%					
30 to 39 (n=148)	10.8%					
40 to 49 (n=192)	14.3%					
50 to 59 (n=204)	10.3%					
60 plus (n=284)	14.4%					

QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

If it was led by Kellie Leitch.

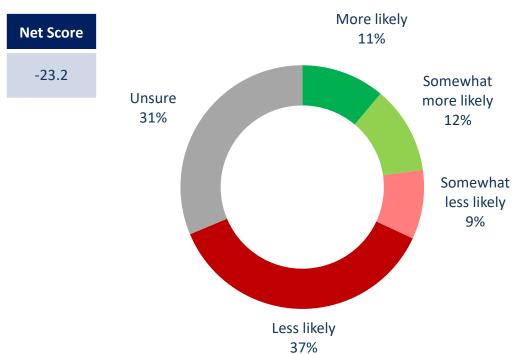




^{*}Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Michael Chong

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	More likely/ Somewhat more likely					
Atlantic (n=100)	21.5%					
Quebec (n=250)	7.6%					
Ontario (n=300)	31.6%					
Prairies (n=200)	24.9%					
British Columbia (n=150)	28.0%					
Male (n=501)	28.6%					
Female (n=499)	17.1%					
18 to 29 (n=172)	22.6%					
30 to 39 (n=148)	25.7%					
40 to 49 (n=192)	20.9%					
50 to 59 (n=204)	20.7%					
60 plus (n=284)	23.7%					

QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

If it was led by Michael Chong.

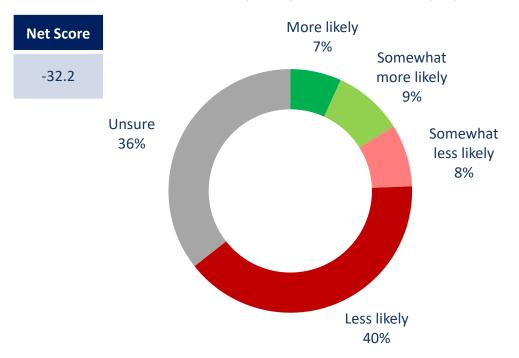




^{*}Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Erin O'Toole

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	More likely/ Somewhat more likely					
Atlantic (n=100)	14.0%					
Quebec (n=250)	9.6%					
Ontario (n=300)	16.7%					
Prairies (n=200)	24.4%					
British Columbia (n=150)	16.1%					
Male (n=501)	22.9%					
Female (n=499)	9.8%					
18 to 29 (n=172)	18.7%					
30 to 39 (n=148)	14.4%					
40 to 49 (n=192)	15.4%					
50 to 59 (n=204)	12.3%					
60 plus (n=284)	18.4%					

QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

If it was led by Erin O'Toole.

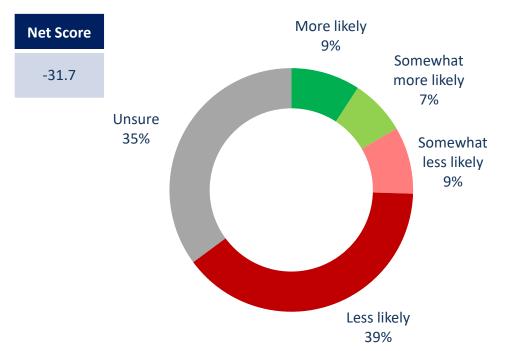




^{*}Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Andrew Scheer

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	More likely/ Somewhat more likely
Atlantic (n=100)	11.2%
Quebec (n=250)	10.9%
Ontario (n=300)	15.5%
Prairies (n=200)	27.5%
British Columbia (n=150)	17.0%
Male (n=501)	22.7%
Female (n=499)	10.7%
18 to 29 (n=172)	16.9%
30 to 39 (n=148)	15.3%
40 to 49 (n=192)	16.0%
50 to 59 (n=204)	13.1%
60 plus (n=284)	19.9%

QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

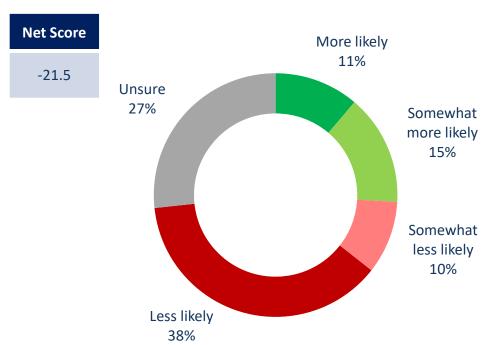
If it was led by Andrew Scheer.



^{*}Note: Charts may not add up to 100 due to rounding

Likelihood of voting for Conservative Party if led by Lisa Raitt

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, May 24th to 25th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



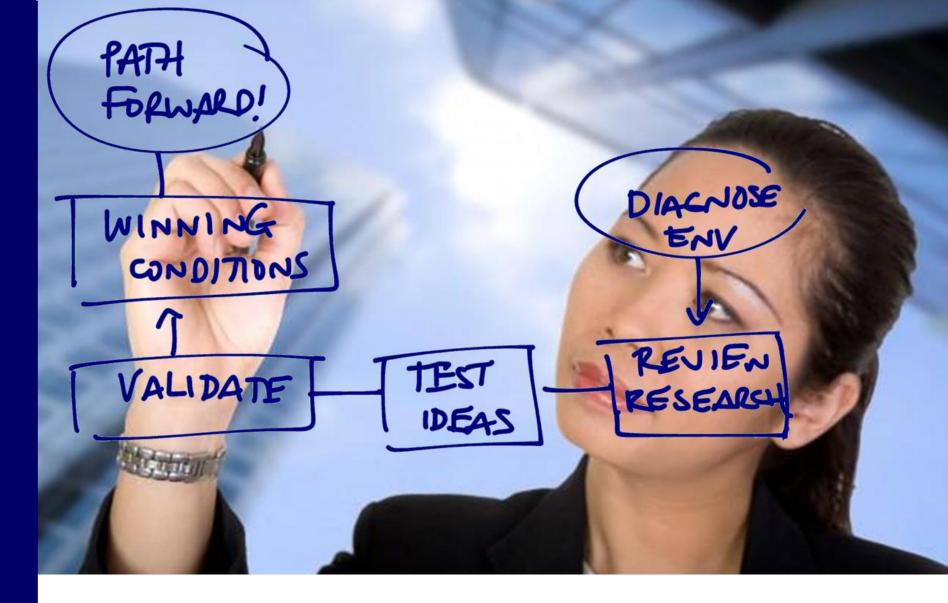
Subgroups	More likely/ Somewhat more likely
Atlantic (n=100)	35.6%
Quebec (n=250)	12.6%
Ontario (n=300)	30.4%
Prairies (n=200)	33.1%
British Columbia (n=150)	23.1%
Male (n=501)	30.9%
Female (n=499)	21.2%
18 to 29 (n=172)	24.1%
30 to 39 (n=148)	22.9%
40 to 49 (n=192)	32.7%
50 to 59 (n=204)	23.2%
60 plus (n=284)	26.1%

QUESTION – The Conservative Party of Canada is going to select a new leader on May 27th. Are you more likely, somewhat more likely, somewhat less likely or less likely to vote for the Conservative party in the 2019 federal election if it is led by each of the following? [RANDOMIZE]

If it was led by Lisa Raitt.



^{*}Note: Charts may not add up to 100 due to rounding



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between May 24th and 25th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

Note: Charts may not add up to 100 due to rounding.

Technical Note

Element	Description	Element	Description					
Organization who commissioned the research	Globe and Mail	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure					
Final Sample Size	1,000 Randomly selected individuals.		Screening ensured potential respondents did not work in the					
Margin of Error	±3.1 percentage points, 19 times out of 20.	Screening	market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.					
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line could not participate.					
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Stratification	By age and gender using the latest Census information (2014) a the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.					
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Estimated Response Rate	12 percent, consistent with industry norms.					
Demographics (Other)	Age, gender, education, income	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.					
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This was module three of an omnibus survey. Preceding modules asked about unprompted top issues of national concern, the conservative party leadership race and opinions on federal					
Number of Calls/	Maximum of five call backs.		political parties.					
Time of Calle	Individuals were called between 12-5:30 pm and 6:30-	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.					
Time of Calls	9:30pm local time for the respondent.	Survey Company	Nanos Research					
Field Dates	May 24 th to 25 th , 2017.		Contact Nanos Research for more information or with any					
Language of Survey	The survey was conducted in both English and French.	Contact	concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.					

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



Tabulations

			Region					-	Gender				Age			
								British								
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284	
Maxime Bernier		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265	
	More likely	%	14.8	8.1	13.2	15.3	22.3	10.6	19.9	9.9	14.8	14.4	17.6	11.1	15.5	
	Somewhat more likely	%	14.6	15.4	17.0	15.1	16.5	6.8	17.3	12.1	12.8	13.1	16.2	16.0	14.9	
	Somewhat less likely	%	9.3	9.3	7.5	8.7	11.2	10.6	10.7	7.9	9.0	12.3	10.3	8.1	7.6	
	Less likely	%	40.5	42.3	53.2	40.1	23.6	41.2	38.4	42.4	35.2	38.0	33.7	46.8	46.0	
	Unsure	%	20.9	24.9	9.1	20.8	26.5	30.7	13.7	27.8	28.1	22.2	22.2	17.9	16.0	

				Region					Gender				Age		
								British							
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284
Kellie Leitch		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	More likely	%	6.7	2.8	6.1	5.8	12.3	4.7	8.2	5.3	8.9	4.4	7.6	4.5	7.6
	Somewhat more likely	%	6.1	4.5	7.1	4.9	7.9	5.6	7.7	4.7	4.7	6.4	6.7	5.8	6.8
	Somewhat less likely	%	6.4	6.5	5.9	6.1	9.8	3.1	8.2	4.6	5.6	6.8	8.0	2.5	8.3
	Less likely	%	57.7	59.9	63.0	63.4	41.2	58.4	58.7	56.9	49.7	57.8	55.8	65.7	59.4
	Unsure	%	23.0	26.3	17.9	19.8	28.8	28.2	17.3	28.5	31.1	24.6	21.9	21.5	18.0

				Region					Gender				Age		
								British							
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284
Michael Chong		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	More likely	%	11.1	9.8	4.8	18.6	10.7	8.1	13.8	8.5	12.3	11.2	10.6	9.3	11.8
	Somewhat more likely	%	11.6	11.7	2.8	13.0	14.2	19.9	14.8	8.6	10.3	14.5	10.3	11.4	11.9
	Somewhat less likely	%	9.2	9.4	6.6	11.6	11.3	6.0	11.4	7.2	9.1	8.7	9.7	7.8	10.3
	Less likely	%	36.7	30.9	63.6	25.9	25.8	32.2	38.2	35.4	31.8	36.6	32.2	43.6	38.8
	Unsure	%	31.3	38.2	22.2	30.9	38.0	33.7	21.8	40.3	36.5	28.9	37.2	27.9	27.2

				Region						Gender				Age		
								British								
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284	
Erin O'Toole		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265	
	More likely	%	6.8	6.0	4.2	7.9	8.6	7.4	9.4	4.5	9.4	5.1	7.2	4.3	7.6	
	Somewhat more likely	%	9.3	8.0	5.4	8.8	15.8	8.7	13.5	5.3	9.3	9.3	8.2	8.0	10.8	
	Somewhat less likely	%	8.3	9.8	6.9	7.5	11.3	7.6	7.6	9.0	6.2	10.8	7.3	8.3	9.1	
	Less likely	%	40.0	34.8	60.9	36.8	22.5	38.6	41.4	38.7	33.9	38.3	37.3	48.0	41.8	
	Unsure	%	35.6	41.4	22.7	39.0	41.9	37.8	28.2	42.6	41.3	36.5	39.9	31.3	30.6	

			Region				Gender				Age				
								British							
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284
Andrew Scheer		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	More likely	%	9.2	4.7	7.1	9.2	16.1	6.2	10.3	8.1	10.7	7.0	10.5	6.3	10.5
	Somewhat more likely	%	7.4	6.5	3.8	6.3	11.4	10.8	12.4	2.6	6.2	8.3	5.5	6.8	9.4
	Somewhat less likely	%	8.9	11.6	9.4	8.2	11.8	4.1	9.9	8.0	6.0	12.4	8.4	9.5	9.0
	Less likely	%	39.4	33.4	56.8	37.4	21.7	42.0	38.6	40.2	35.7	36.8	33.4	47.4	42.4
	Unsure	%	35.1	43.8	22.9	38.8	39.0	36.9	28.8	41.0	41.4	35.4	42.3	29.9	28.8

			Region					Gender				Age			
								British							
			Canada 2017-05	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - If it was led by	Total	Unwgt N	1000	100	250	300	200	150	501	499	172	148	192	204	284
Lisa Raitt		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	More likely	%	11.2	12.9	6.4	13.9	15.2	7.7	12.0	10.5	13.1	10.1	12.8	9.1	10.9
	Somewhat more likely	%	14.7	22.7	6.2	16.5	17.9	15.4	18.9	10.7	11.0	12.8	19.9	14.1	15.2
	Somewhat less likely	%	9.7	13.7	8.3	10.0	12.3	5.3	11.4	8.1	9.4	11.2	9.5	8.6	9.8
	Less likely	%	37.7	21.0	59.9	35.0	20.9	39.6	37.4	38.0	31.6	37.9	30.7	43.7	42.8
	Unsure	%	26.7	29.7	19.3	24.7	33.8	32.0	20.4	32.8	35.0	28.0	27.1	24.5	21.2