LEGER'S NORTH AMERICAN TRACKER

April 16th, 2021

THE CANADIAN PRESS

ACS • AEC

METHODOLOGY

Leger,the largest Canadian-owned polling and marketing research firm, in collaboration with the Canadian press, conducted this Web survey with a representative sample of **1,504 Canadians and 1,002 Americans,** over the age of 18, selected from LEO's (Leger Opinion) representative panel. The questionnaire consisted of 25 questions and was completed in 10 minutes on average. Data collection took place from **April 9th, 2021 to April 11th, 2021**, via Computer-Assisted Web Interviewing technology (CAWI). Using 2016 Census reference variables, the Canadian data was then analyzed and weighted by our statisticians according to gender, age, mother tongue, region, education level and the presence of children in households in order to render a representative sample of the general population. Using 2010 U.S. Census reference variables, the American data was then analyzed and weighted by our statisticians according to gender, age, region, race/ethnicity, household size and education level in order to render a representative sample of the general population.

The LEO (Leger Opinion) panel is the largest Canadian panel with over 400,000 representative panelists from all regions of Canada. LEO was created by Leger based on a representative Canadian sample of Canadian citizens with Internet access. LEO's panelists were randomly selected (RDD) through Leger's call centre, panelists from more hard-to-reach target groups were also added to the panel through targeted recruitment campaigns. The double-opt-in selection process, a model to detect fraud and the renewal of 25% of the panel each year ensures complete respondent quality. To ensure a higher response rate and reach people on their mobile devices, Leger has also developed a high-performance Apple and Android application. In fact, Leger is the only Canadian research firm offering both the number and quality of panelists. Most competing polling firms in Canada and the United States also use the LEO panel.

A margin of error cannot be associated with a non-probability sample in a panel survey. For comparison purposes, a probability sample of this size would have a margin of error **±2.53%, 19 times out of 20** for the Canadian sample and of **±3.09%, 19 times out of 20** for the American sample. The results presented in this study comply with the public opinion research standards and disclosure requirements of CRIC (the Canadian Research and Insights Council) and the global ESOMAR network. Leger is a founding member of CRIC and is actively involved in raising quality standards in the survey industry. President Jean-Marc Léger is a member of the CRIC's Board of Directors and the Canadian representative of ESOMAR.

Leger is the polling firm that has presented the most accurate data, on average, over the last ten years in Canada. During the last federal election in 2019, Leger was once again the most accurate firm in the country. This accuracy is attributed to the quality of the LEO panel and rigorous application of methodological rules by Leger's 600 employees, including 200 professionals in Leger's eight offices across Canada (Montreal, Toronto, Quebec City, Winnipeg, Calgary, Edmonton and Vancouver) and in the United States (Philadelphia).

Poll aggregator 338Canada.com gave Leger the highest rating among all polling firms in Canada for the accuracy of its studies. See https://338canada.com/pollster-ratings.htm

Federal Elections 2019		
Federal Parties	**Leger Survey**	**Official Results**
LPC	33%	33%
CPC	33%	34%
NDP	18%	16%
BQ	8%	8%
Green	6%	7%
PPC	2%	2%

METHODOLOGY

The numbers presented have been rounded. However, the numbers before rounding were used to calculate the sums presented and might therefore not correspond to the manual addition of these numbers.

In this report, data in bold **red** characters indicate a significantly lower proportion than that of other respondents. Conversely, data in bold **green** characters indicate a significantly higher proportion that that of other respondents.

A more detailed methodology is presented in the appendix.

If you have questions about the data presented in this report, please contact Christian Bourque, Associate and Executive Vice-Present at the following e-mail address: cbourque@leger360.com or Jack Jedwab, President & CEO of the Association for Canadian Studies: jack.jedwab@acs-aec.ca

FEDERAL BUDGET

FEDERAL BUDGET PRIORITY

CTC611. A new federal budget will be presented by the government on April 19, the first budget since the pandemic. What do you feel should be the focus of this budget? *Select one below*

Base: All respondents (n=1,504)

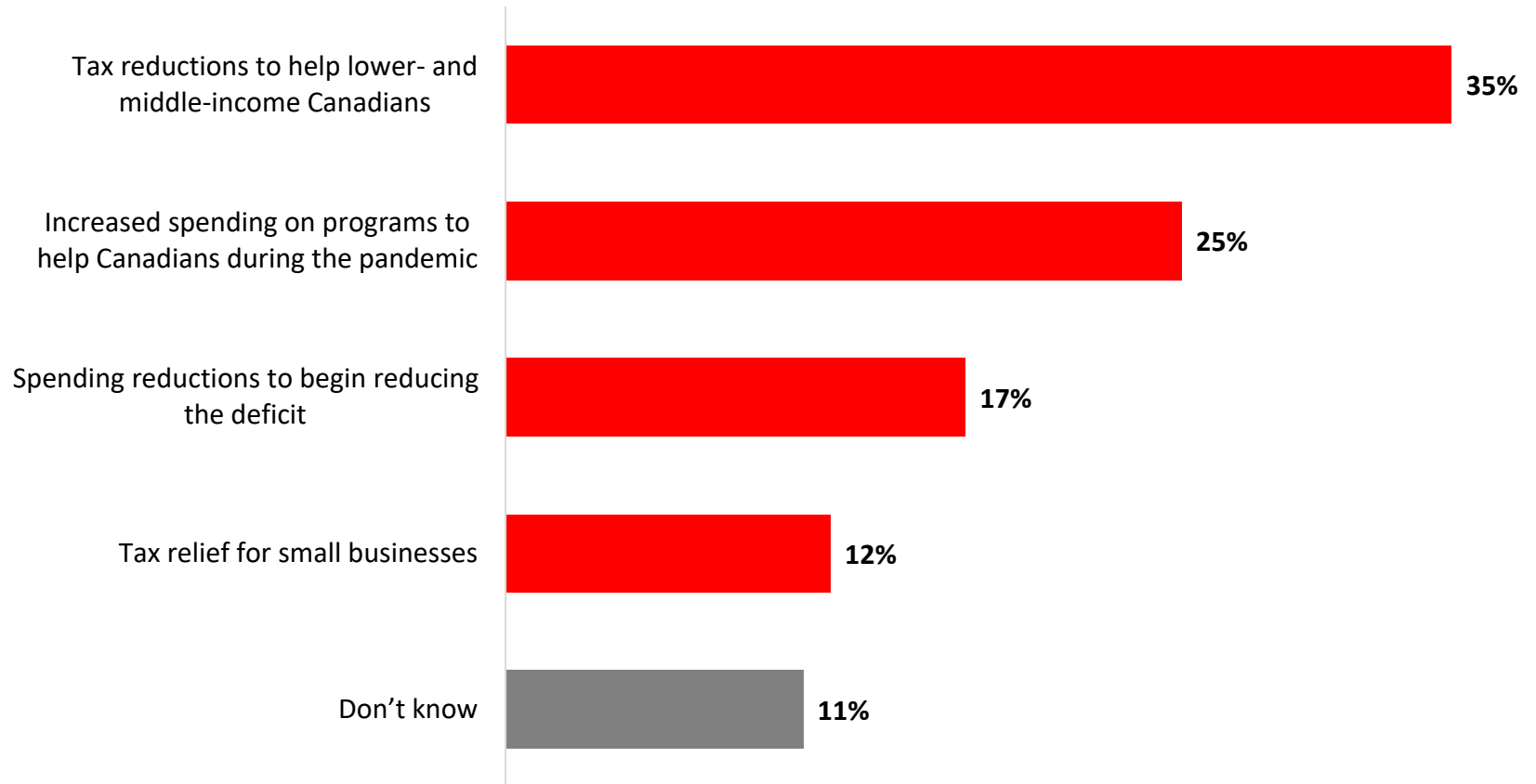| Priority	%
Tax reductions to help lower- and middle-income Canadians	35%
Increased spending on programs to help Canadians during the pandemic	25%
Spending reductions to begin reducing the deficit	17%
Tax relief for small businesses	12%
Don't know	11%

FEDERAL BUDGET PRIORITY - *DETAILS*

CTC611. A new federal budget will be presented by the government on April 19, the first budget since the pandemic. What do you feel should be the focus of this budget? *Select one below*

Base: All respondents

	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n =	1,504	103	353	577	98	169	204	418	498	588	625	556	304
Unweighted n =	1,504	100	402	602	125	125	150	387	520	597	638	554	296
Tax reductions to help lower- and middle-income Canadians	35%	46%	35%	34%	39%	28%	39%	32%	40%	35%	33%	37%	37%
Increased spending on programs to help Canadians during the pandemic	25%	26%	17%	28%	25%	24%	28%	24%	25%	26%	30%	24%	18%
Spending reductions to begin reducing the deficit	17%	11%	24%	13%	11%	25%	14%	16%	14%	19%	14%	17%	22%
Tax relief for small businesses	12%	6%	11%	14%	14%	13%	9%	15%	12%	10%	11%	14%	11%
Don't know	11%	11%	13%	10%	10%	9%	10%	14%	9%	10%	12%	8%	13%

By voting intentions

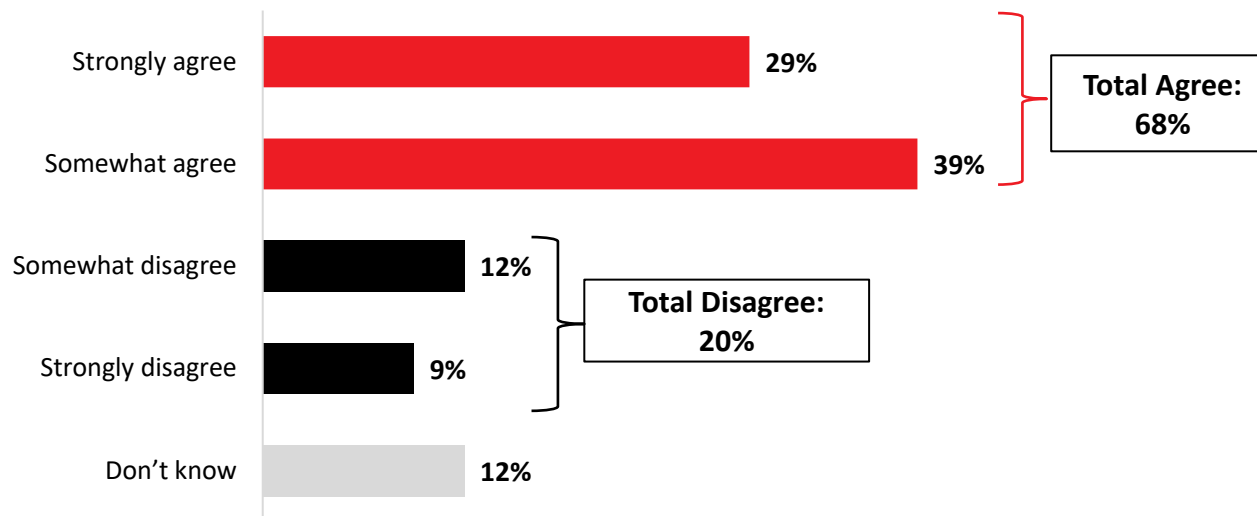|	TOTAL CANADA	LPC	CPC	NDP	BQ	GP	Other
Weighted n =	1,504	435	368	217	85	92	41
Unweighted n =	1,504	467	363	208	97	81	43
Tax reductions to help lower- and middle-income Canadians	35%	33%	41%	39%	32%	29%	34%
Increased spending on programs to help Canadians during the pandemic	25%	36%	15%	33%	13%	30%	18%
Spending reductions to begin reducing the deficit	17%	10%	28%	8%	28%	16%	35%
Tax relief for small businesses	12%	13%	10%	15%	12%	15%	12%
Don't know	11%	8%	5%	5%	15%	10%	1%

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LEVEL OF AGREEMENT WITH SUSTAINABLE ECONOMIC PRACTICES

CTC612. Would you agree or disagree that this budget should lay out a plan to shift Canada's economy away from fossil fuels and other environmentally unfriendly practices and instead focus on sustainable economic practices focussed on renewable and alternative energy production?

Base: All respondents (n=1,504)

	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n =	1,504	103	353	577	98	169	204	418	498	588	625	556	304
Unweighted n =	1,504	100	402	602	125	125	150	387	520	597	638	554	296
Total Agree	**68%**	70%	**79%**	68%	**47%**	**56%**	69%	**75%**	**64%**	66%	70%	70%	**63%**
Strongly agree	**29%**	26%	**40%**	**26%**	**16%**	26%	28%	**38%**	**25%**	26%	31%	29%	25%
Somewhat agree	**39%**	44%	39%	42%	**30%**	**30%**	41%	37%	40%	40%	38%	41%	38%
Total Disagree	**20%**	14%	**8%**	21%	**35%**	**41%**	19%	**14%**	22%	**24%**	18%	21%	24%
Somewhat disagree	**12%**	8%	**5%**	**14%**	16%	15%	12%	9%	13%	12%	11%	13%	10%
Strongly disagree	**9%**	6%	**3%**	**7%**	**19%**	**26%**	7%	**5%**	9%	**12%**	7%	8%	**14%**
Don't know	**12%**	17%	12%	11%	**18%**	**3%**	12%	12%	14%	10%	12%	**9%**	13%

LEVEL OF AGREEMENT WITH SUSTAINABLE ECONOMIC PRACTICES - *DETAILS*

CTC612. Would you agree or disagree that this budget should lay out a plan to shift Canada's economy away from fossil fuels and other environmentally unfriendly practices and instead focus on sustainable economic practices focussed on renewable and alternative energy production?

Base: All respondents

By voting intentions

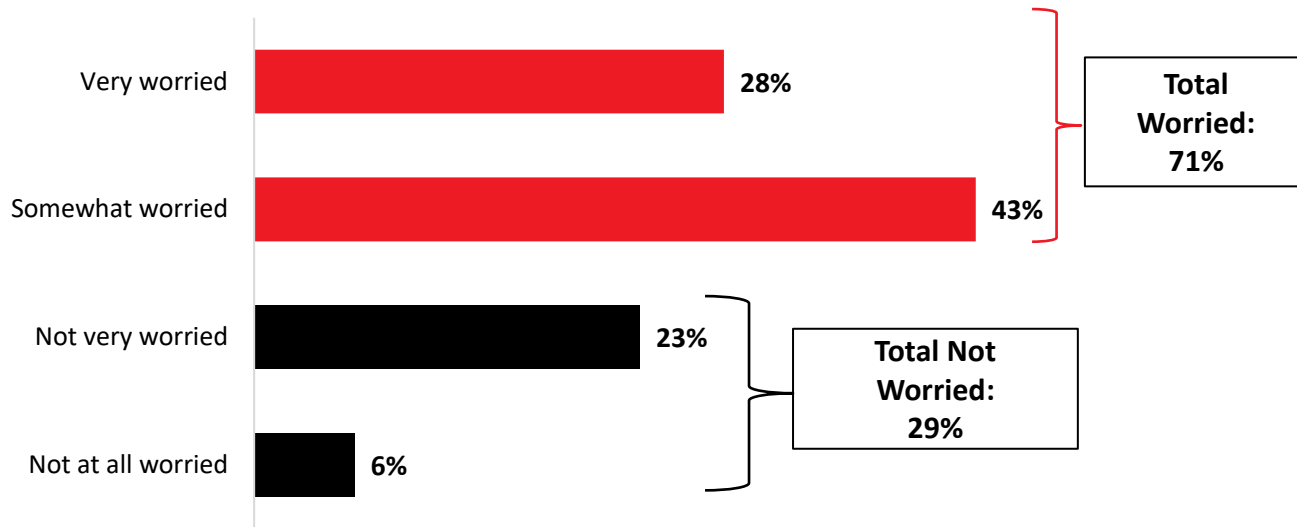|	TOTAL CANADA	LPC	CPC	NDP	BQ	GP	Other
Weighted n =	1,504	435	368	217	85	92	41
Unweighted n =	1,504	467	363	208	97	81	43
Total Agree	**68%**	**83%**	**49%**	**80%**	**85%**	**87%**	**45%**
Strongly agree	**29%**	31%	**11%**	**51%**	**56%**	**59%**	23%
Somewhat agree	**39%**	**52%**	37%	**29%**	**29%**	**28%**	**22%**
Total Disagree	**20%**	**10%**	**42%**	**14%**	**5%**	**7%**	**45%**
Somewhat disagree	**12%**	**8%**	**19%**	10%	**3%**	7%	9%
Strongly disagree	**9%**	**2%**	**23%**	**4%**	**2%**	**0%**	**35%**
Don't know	**12%**	6%	9%	6%	9%	6%	10%

CONCERNS ABOUT THE DEFICIT

CTC613. The current federal deficit is estimated to be about $380 billion, which is the largest deficit in the country's history. Does the size of the deficit and what it means for future government actions worry or not worry you?
Base: All respondents (n=1,504)

Very worried — 28%
Somewhat worried — 43%

Total Worried: 71%

Not very worried — 23%
Not at all worried — 6%

Total Not Worried: 29%

	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n =	1,504	103	353	577	98	169	204	418	498	588	625	556	304
Unweighted n =	1,504	100	402	602	125	125	150	387	520	597	638	554	296
Total Worried	**71%**	64%	70%	71%	79%	77%	72%	70%	**75%**	69%	70%	72%	73%
Very worried	**28%**	**19%**	**24%**	30%	24%	**38%**	31%	25%	29%	30%	27%	28%	32%
Somewhat worried	**43%**	45%	46%	41%	**54%**	38%	41%	45%	46%	**39%**	42%	44%	41%
Total Not Worried	**29%**	36%	30%	29%	21%	23%	28%	30%	**25%**	31%	30%	28%	27%
Not very worried	**23%**	30%	25%	22%	16%	17%	25%	24%	**20%**	24%	24%	22%	23%
Not at all worried	**6%**	5%	5%	7%	5%	7%	4%	5%	5%	7%	6%	6%	5%

CONCERNS ABOUT THE DEFICIT - *DETAILS*

CTC613. The current federal deficit is estimated to be about $380 billion, which is the largest deficit in the country's history. Does the size of the deficit and what it means for future government actions worry or not worry you?

Base: All respondents

By voting intentions

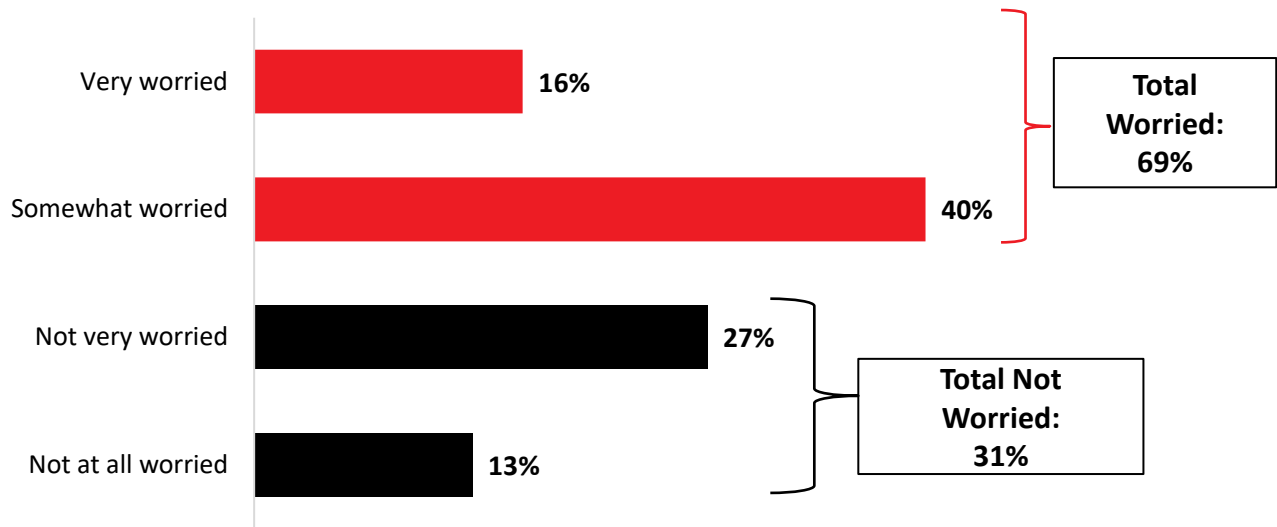|	TOTAL CANADA	LPC	CPC	NDP	BQ	GP	Other
Weighted n =	1,504	435	368	217	85	92	41
Unweighted n =	1,504	467	363	208	97	81	43
Total Worried	**71%**	**60%**	**84%**	67%	76%	**84%**	66%
Very worried	**28%**	**14%**	**45%**	23%	34%	**45%**	25%
Somewhat worried	**43%**	**47%**	39%	44%	43%	39%	40%
Total Not Worried	**29%**	**40%**	**16%**	33%	24%	**16%**	34%
Not very worried	**23%**	**31%**	**13%**	26%	18%	**13%**	28%
Not at all worried	**6%**	**9%**	**3%**	6%	6%	**3%**	6%

CONCERNS ABOUT THE DEFICIT

American survey

CTC613. The current federal deficit is estimated to be about $3.3 trillion, which is the largest deficit in the country's history. Does the size of the deficit and what it means for future government actions worry or not worry you?
Base: All respondents (n=1,002)

Very worried	16%
Somewhat worried	40%

Total Worried: 69%

Not very worried	27%
Not at all worried	13%

Total Not Worried: 31%

Who did you vote for?

	TOTAL USA	North-East	Mid-West	South	West	18-34	35-54	55+	Male	Female	Trump	Biden	Other
Weighted n =	1,002	179	217	372	233	281	376	346	486	516	372	404	16
Unweighted n =	1,002	197	220	332	253	214	369	419	501	501	347	458	36
Total Worried	**69%**	68%	72%	68%	67%	71%	65%	71%	69%	68%	89%	52%	60%
Very worried	**31%**	30%	36%	28%	33%	29%	28%	37%	34%	29%	56%	15%	32%
Somewhat worried	**37%**	37%	36%	39%	35%	42%	37%	34%	35%	39%	33%	37%	28%
Total Not Worried	**31%**	32%	28%	32%	33%	29%	35%	29%	31%	32%	11%	48%	40%
Not very worried	**21%**	22%	15%	23%	22%	17%	24%	20%	17%	24%	5%	33%	24%
Not at all worried	**11%**	10%	13%	10%	11%	12%	11%	9%	13%	8%	6%	15%	16%

CONCERNS ABOUT THE DEFICIT
(CANADA VS UNITED STATES)

CTC613. The current federal deficit is estimated to be about $380 billion/$3.3 trillion, which is the largest deficit in the country's history. Does the size of the deficit and what it means for future government actions worry or not worry you?
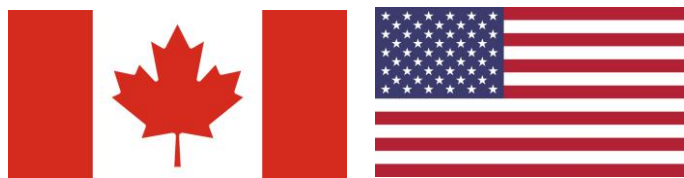
Base: All respondents

	TOTAL CANADA	TOTAL USA	Gap
Weighted n =	1,504	1,002	
Unweighted n =	1,504	1,002	
Total Worried	71%	69%	2
Very worried	28%	31%	3
Somewhat worried	**43%**	**37%**	6
Total Not Worried	29%	31%	2
Not very worried	23%	21%	2
Not at all worried	**6%**	**11%**	5

NEXT FEDERAL ELECTION

CTC614. A new budget must be voted on in the House of Commons. If it does not pass, it would cause a national election. Regardless of what might be in the budget, would you prefer an election this spring, this fall or later?

Base: All respondents (n=1,504)

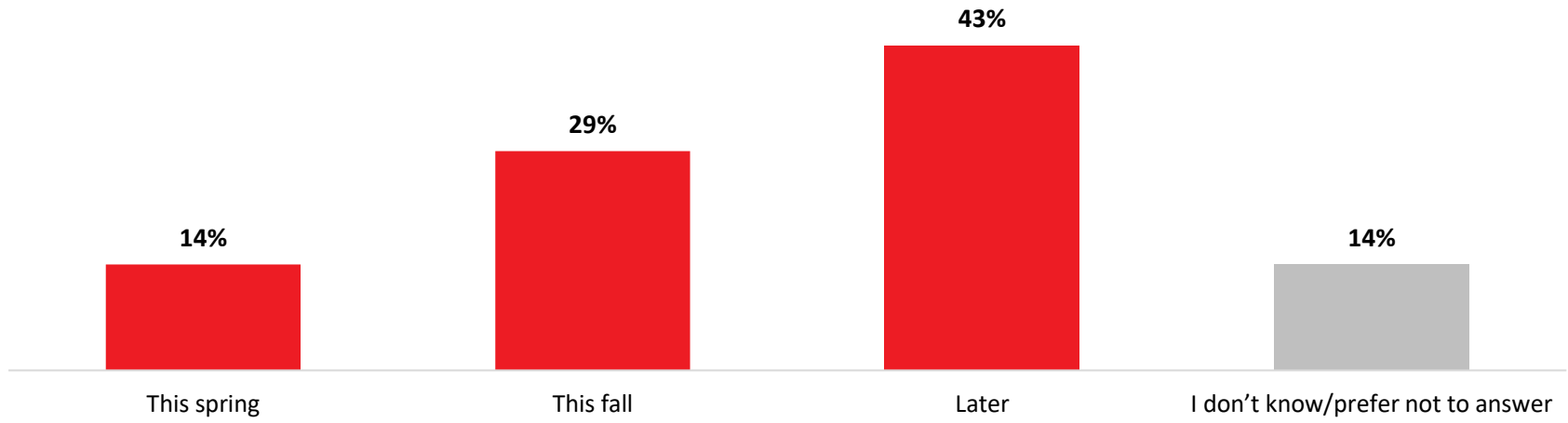|	TOTAL CANADA	ATL	QC	ON	MB/SK	AB	BC	18-34	35-54	55+	Urban	Sub-urban	Rural
Weighted n =	1,504	103	353	577	98	169	204	418	498	588	625	556	304
Unweighted n =	1,504	100	402	602	125	125	150	387	520	597	638	554	296
This spring	**14%**	10%	**10%**	14%	18%	**22%**	12%	**18%**	16%	**9%**	12%	13%	**18%**
This fall	**29%**	26%	**35%**	28%	29%	29%	23%	**34%**	29%	**25%**	30%	31%	**24%**
Later	**43%**	46%	44%	44%	**34%**	36%	48%	**27%**	41%	**57%**	41%	46%	44%
I don't know/prefer not to answer	**14%**	18%	12%	14%	19%	13%	17%	**21%**	14%	**10%**	**17%**	**10%**	14%

NEXT FEDERAL ELECTION - *DETAILS*

CTC614. A new budget must be voted on in the House of Commons. If it does not pass, it would cause a national election. Regardless of what might be in the budget, would you prefer an election this spring, this fall or later?

Base: All respondents

By voting intentions

	TOTAL CANADA	LPC	CPC	NDP	BQ	GP	Other
Weighted n =	1,504	435	368	217	85	92	41
Unweighted n =	1,504	467	363	208	97	81	43
This spring	14%	6%	25%	15%	8%	7%	26%
This fall	29%	26%	34%	33%	35%	39%	22%
Later	43%	60%	32%	36%	50%	41%	43%
I don't know/prefer not to answer	14%	7%	8%	16%	7%	13%	9%

VOTING INTENTIONS - FEDERAL ELECTIONS

CTC37. If federal elections were held today, for which political party would you be most likely to vote? Would it be for...? *In the event a respondent had no opinion, the following prompting question was asked:* **Even if you have not yet made up your mind, for which of the following political parties would you be most likely to vote? Would it be for the ...**

Base: All respondents (n=1,504), except for the Bloc Québécois, Quebecers only

	TOTAL Canada	TOTAL Decided voters	ATL	QC	ON	MB/SK	AB	BC	Male	Female	18-34	35-54	55+	Total March 29th, 2021	Gap
Weighted n =	1,504	1,238	88	300	471	72	143	165	628	610	333	403	503	1,255	
Unweighted n =	1,504	1,259	86	341	504	94	110	124	634	625	311	431	517	1,275	
... Justin Trudeau's Liberal Party of Canada	29%	35%	46%	32%	37%	34%	26%	37%	36%	34%	26%	36%	40%	35%	-
... Erin O'Toole's Conservative Party of Canada	24%	30%	26%	19%	33%	38%	40%	30%	33%	26%	23%	34%	31%	28%	+2
... Jagmeet Singh's New Democratic Party of Canada	14%	18%	16%	11%	19%	20%	23%	20%	12%	23%	35%	15%	8%	22%	-4
... Yves-François Blanchet's Bloc Québécois	6%	7%	-	28%	-	-	-	-	-	-	-	-	-	7%	-
... Annamie Paul's Green Party of Canada	6%	7%	9%	6%	8%	4%	6%	11%	7%	8%	11%	7%	6%	6%	+1
... another party	3%	3%	3%	3%	3%	5%	5%	3%	4%	2%	2%	3%	5%	2%	+1
I would not vote	5%	-	-	-	-	-	-	-	-	-	-	-	-	-	-
I would cancel my vote	1%	-	-	-	-	-	-	-	-	-	-	-	-	-	-
I don't know	9%	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Refusal	2%	-	-	-	-	-	-	-	-	-	-	-	-	-	-

TRENDS IN VOTING INTENTIONS IN CANADA

	04-13-2020	04-20-2020	04-27-2020	05-04-2020	05-11-2020	05-19-2020	05-25-2020	06-01-2020	06-08-2020	06-15-2020	06-22-2020	06-29-2020	07-06-2020	07-13-2020	07-20-2020	07-27-2020	08-03-2020	08-10-2020	08-07-2020	08-24-2020	08-31-2020	09-08-2020	09-13-2020	09-21-2020	09-28-2020	10-05-2020	10-13-2020	10-19-2020	10-26-2020	11-02-2020	11-09-2020	11-16-2020	11-30-2020	12-14-2020	01-04-2021	01-18-2021	02-01-2021	02-15-2021	03-01-2021	03-15-2021	03-29-2021	04-12-2021
LPC	39%	42%	43%	44%	41%	44%	41%	40%	46%	40%	39%	40%	39%	38%	39%	35%	33%	36%	35%	38%	35%	34%	35%	35%	40%	36%	37%	36%	37%	34%	36%	35%	34%	35%	35%	36%	37%	36%	35%	36%	35%	35%
CPC	28%	29%	28%	25%	28%	25%	27%	27%	25%	27%	28%	28%	25%	26%	28%	29%	31%	29%	32%	30%	29%	32%	31%	30%	30%	32%	29%	29%	30%	31%	28%	31%	30%	29%	30%	29%	28%	29%	28%	31%	28%	30%
NDP	18%	14%	14%	15%	17%	15%	15%	18%	15%	16%	19%	17%	20%	19%	17%	20%	20%	15%	18%	18%	21%	19%	18%	19%	17%	20%	21%	18%	18%	21%	21%	18%	20%	23%	20%	21%	22%	20%	23%	19%	22%	18%
BQ	6%	8%	7%	7%	7%	7%	7%	7%	7%	7%	7%	7%	8%	8%	7%	9%	8%	8%	8%	7%	8%	7%	7%	8%	8%	7%	7%	8%	8%	7%	7%	8%	7%	7%	7%	7%	7%	6%	7%	6%	7%	7%
GPC	8%	5%	6%	6%	6%	7%	6%	7%	6%	7%	5%	5%	5%	7%	7%	6%	6%	8%	6%	6%	5%	6%	6%	6%	5%	4%	6%	6%	5%	6%	5%	6%	7%	5%	6%	6%	5%	7%	6%	5%	6%	7%
Others	2%	2%	2%	2%	1%	2%	2%	2%	1%	3%	2%	2%	2%	2%	2%	1%	2%	3%	2%	2%	2%	1%	3%	2%	1%	1%	1%	2%	2%	2%	3%	2%	2%	2%	2%	2%	2%	3%	2%	4%	2%	3%

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WOULD YOU LIKE TO SURVEY CANADIANS AND/OR AMERICANS?

Add your question(s) to our weekly **Omnibus** to survey the population of your choice! It's a flexible, fast, efficient and economical solution.

OMNIBUS TYPE	n=	REGIONS
NATIONAL	1,500	CANADA
PROVINCIAL	1,000	QC, ON, AB, BC
MUNICIPAL	500	QC, MTL, TOR, CAL, EDM, VAN
WESTERN	1,500	BC, AB, SK, MB
AMERICAN	1,000	4 CENSUS REGIONS

More than **400,000 panelists** at your disposal

CONTACT US

APPENDIX

DETAILED METHODOLOGY

Weighted and Unweighted Sample

The table below presents the Canadian geographic distribution of respondents before weighting.

Province	Unweighted	Weighted
British Columbia	150	204
Alberta	125	169
Manitoba/Saskatchewan	125	98
Ontario	602	577
Quebec	402	353
Atlantic	100	103

The table below presents the American geographic distribution of respondents before weighting.

US region	Unweighted	Weighted
NorthEast	197	179
MidWest	220	217
South	332	372
West	253	233

DETAILED METHODOLOGY

Weighted and Unweighted Sample for Canada

The following tables present the demographic distribution of respondents according to gender, age and language (mother tongue) for Canada.

GENDER	Unweighted	Weighted
Male	725	730
Female	774	779

AGE	Unweighted	Weighted
Between 18 and 34	418	387
Between 35 and 54	498	520
55 or over	588	597

LANGUAGE (MOTHER TONGUE)	Unweighted	Weighted
English	925	991
French	358	313
Other	200	221

The sample thus collected has a minimum weighting factor of 0.2051 and a maximum weighting factor of 3.9439. The weighted variance is 0.3307.

DETAILED METHODOLOGY

Weighted and Unweighted Sample for The United States

The following tables present the demographic distribution of respondents according to gender and age for The United States.

GENDER	Unweighted	Weighted
Male	501	485
Female	500	516

AGE	Unweighted	Weighted
Between 18 and 29	125	174
Between 30 and 39	182	218
Between 40 and 49	204	186
Between 50 and 64	278	250
65 or older	212	172

The sample thus collected has a minimum weighting factor of 0.2734 and a maximum weighting factor of 3.4037. The weighted variance is 0.2734.

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.

OUR SERVICES

- **Leger**
  Marketing research and polling

- **Leger Metrics**
  Real-time VOC satisfaction measurement

- **Leger Analytics**
  Data modeling and analysis

- **Legerweb**
  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
OFFICES

CALGARY | EDMONTON | MONTREAL | PHILADELPHIA
QUEBEC CITY | TORONTO | VANCOUVER | WINNIPEG