

National Ballot



April 27th, 2012

Tories and NDP statistically tied

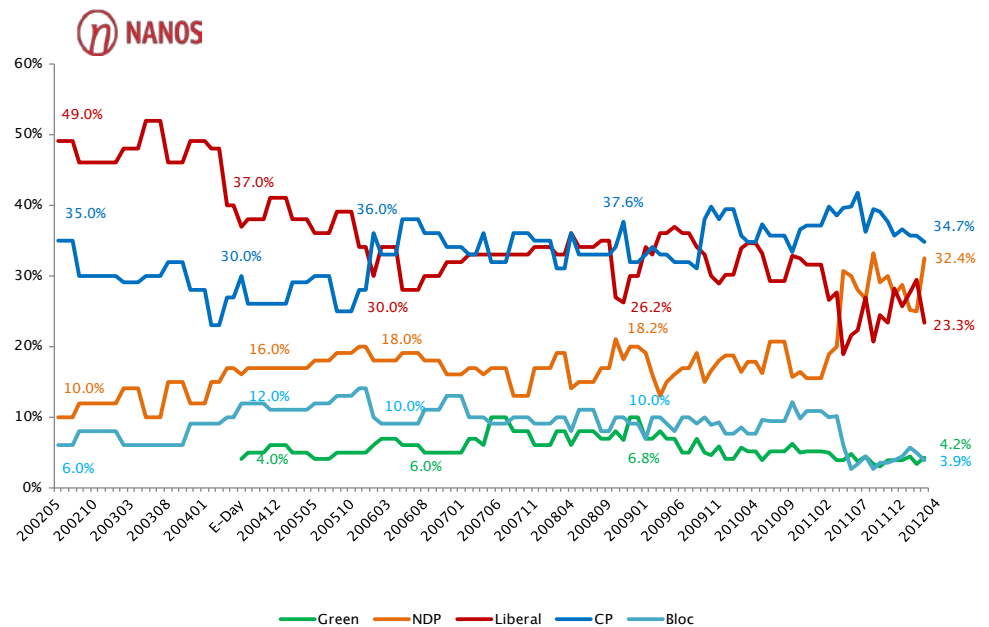
METHODOLOGY

To follow is a review of the latest Nanos national random telephone survey of 1,200 Canadians 18 years of age and older. It was completed between April 13th and 18th, 2012. The statistics of a random sample of 1,200 respondents are accurate to within 2.8 percentage points, plus or minus, 19 times out of 20. For 975 committed voters, it is accurate to within 3.2 percentage points, plus or minus, 19 times out of 20.

Results for 2012-02 are from a random telephone survey of 1,203 Canadians conducted between February 25th and 29th, 2012.

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QUESTION: For those parties you would consider voting for federally, could you please rank your top two current local preferences? (Committed voters only – First Preference)



REGIONAL BALLOT

Committed Voters**	Canada		Atlantic Canada*		Quebec		Ontario		Prairies		British Columbia	
	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04
	n=1,005	n=975	n=97	n=99	n=235	n=230	n=287	n=299	n=213	n=193	n=173	n=153
	%	%	%	%	%	%	%	%	%	%	%	%
Conservative	35.7	34.7	45.6	32.9	15.8	19.7	35.9	36.9	48.3	46.7	41.1	39.0
NDP	25.0	32.4	20.3	35.0	32.6	37.4	21.9	29.3	24.4	30.4	23.1	31.9
Liberal	29.5	23.3	33.3	30.5	26.8	23.2	37.8	27.7	20.6	15.6	28.2	19.6
Green	3.4	4.2	0.7	1.6	1.0	2.7	3.9	5.3	4.0	3.0	6.2	7.5
BQ	4.9	3.9	-	-	20.9	16.4	-	-	-	-	-	-
Margin of error	±3.1	±3.2	±10.1	±10.0	±6.5	±6.5	±5.9	±5.7	±6.8	±7.1	±7.6	±8.0
Undecided	16.4	18.8	19.8	17.3	22.7	23.3	19.9	17.0	11.1	19.5	3.8	15.1

*Note: Small sample size

**Note: Percentages may not add up to 100 due to rounding or other party mentions

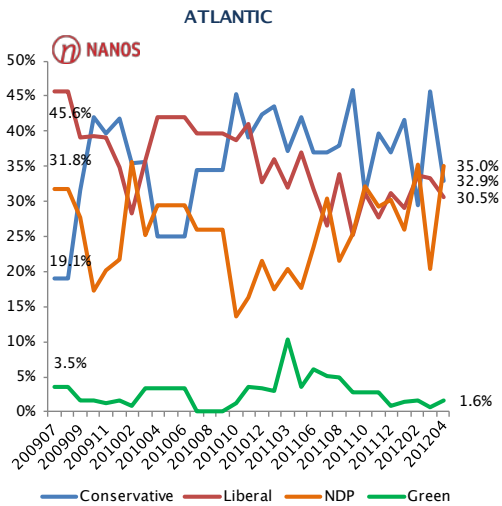
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National Ballot



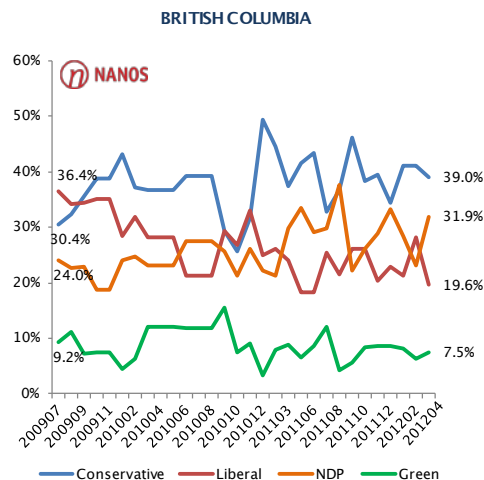
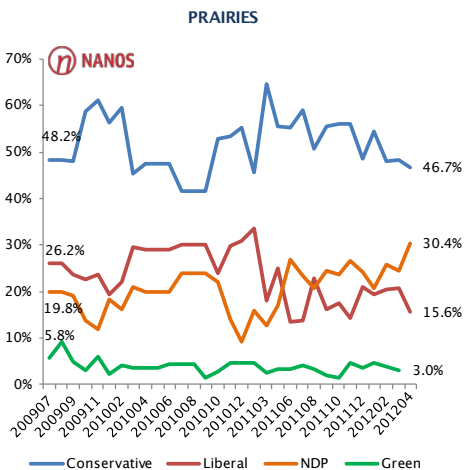
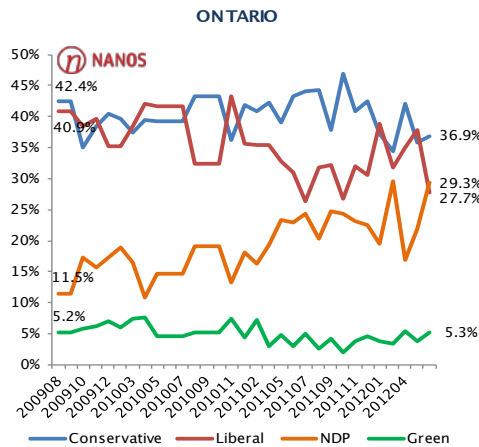
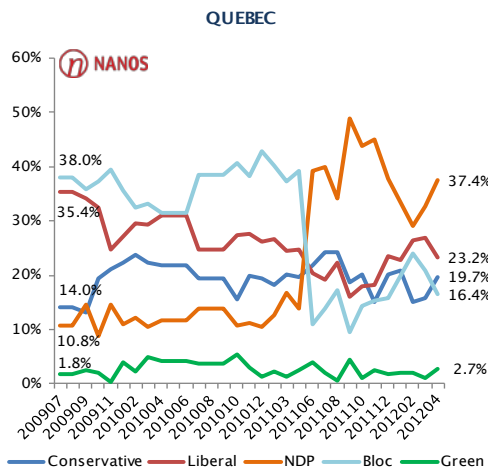
April 27th, 2012

NDP gets a boost across the country



BALLOT BY REGION

Region	Margin of Error (19 times out of 20)
Atlantic	±10.0
Quebec	±6.5
Ontario	±5.7
Prairies	±7.1
British Columbia	±8.0



National Issue



April 27th, 2012

Jobs/economy and healthcare top national issues, education moves up

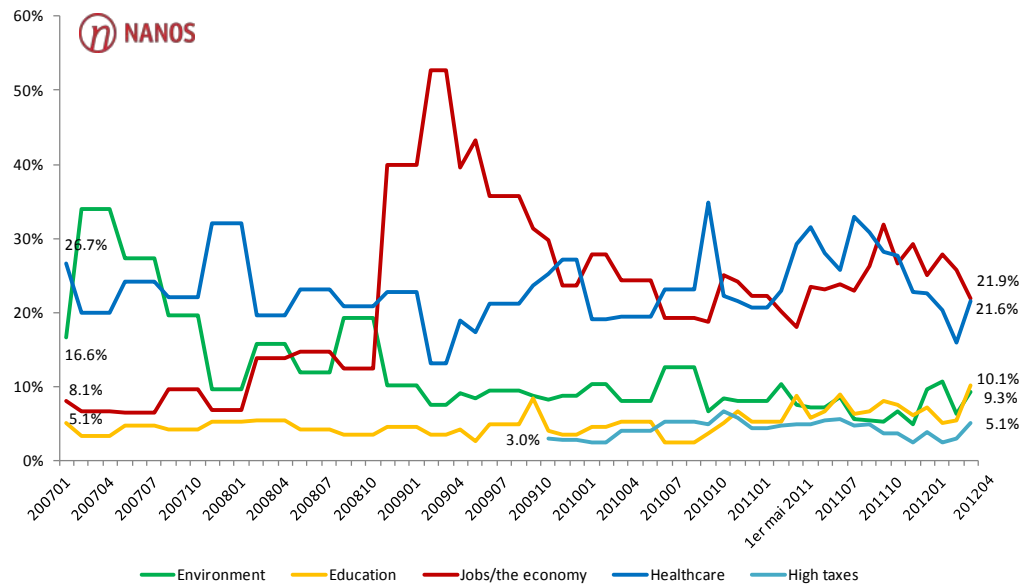
METHODOLOGY

Between April 13th and 18th, 2012, Nanos Research conducted a random telephone survey of 1,200 Canadians 18 years of age and older. A random telephone survey of 1,200 Canadians is accurate plus or minus 2.8 percentage points, 19 times out of 20.

Results for 2012-02 are from a random telephone survey of 1,203 Canadians conducted between February 25th and 29th, 2012. A random telephone survey of 1,203 Canadians is accurate plus or minus 2.8 percentage points, 19 times out of 20.

Any use of this research data should identify it as a "Nanos Research Survey".

QUESTION: What is your most important NATIONAL issue of concern? [Unprompted]



TOP ISSUES

Responses (%)*	2012-02	2012-04	Change
	n=1,203	n=1,200	
	%	%	
Jobs/economy	25.8	21.9	-3.9
Healthcare	15.9	21.6	+5.7
Education	5.4	10.1	+4.7
The environment	6.4	9.3	+2.9
High taxes	3.0	5.1	+2.1
Unsure	18.0	16.6	-1.4

*Percentages may not add up to 100 due to rounding

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Leadership Index



April 27th, 2012

Harper tops Leadership Index with reduced score

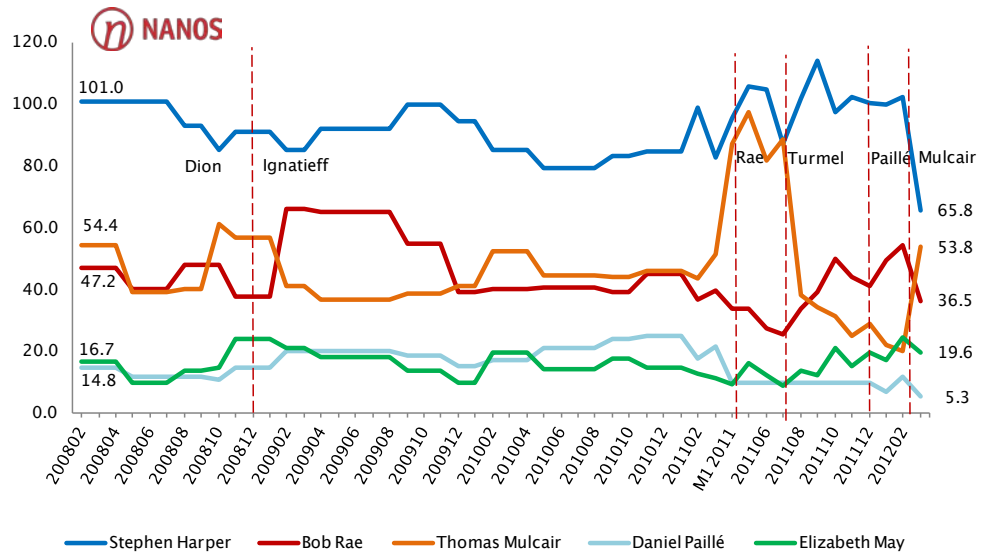
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LEADERSHIP INDICATORS

Leaders*	Trust		Competence		Vision for Canada		Leadership Index Score	
	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04
	n=1,203	n=1,200	n=1,203	n=1,200	n=1,203	n=1,200		
	%	%	%	%	%	%		
Stephen Harper	31.7	20.0	38.1	24.2	32.6	21.6	102.4	65.8
Thomas Mulcair**	6.8	19.5	5.7	17.0	7.8	17.3	20.3	53.8
Bob Rae	19.5	13.6	18.7	12.2	16.2	10.7	54.4	36.5
Elizabeth May	11.3	8.4	5.2	5.1	8.1	6.1	24.6	19.6
Daniel Paillé	4.3	2.0	4.0	1.3	3.4	2.0	11.7	5.3
None of them	12.5	15.8	9.3	15.8	10.5	15.2		
Undecided	13.8	20.6	18.9	24.4	21.4	27.1		
Margin of error	±2.8	±2.8	±2.8	±2.8	±2.8	±2.8		

*Note: Percentages may not add up to 100 due to rounding.

**Note: In 2012-02, Nycole Turmel was listed as interim leader of the federal NDP in the Nanos Leadership Index.

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Most Trustworthy Leader



April 27th, 2012

Harper and Mulcair tied on trust, one in five undecided

METHODOLOGY

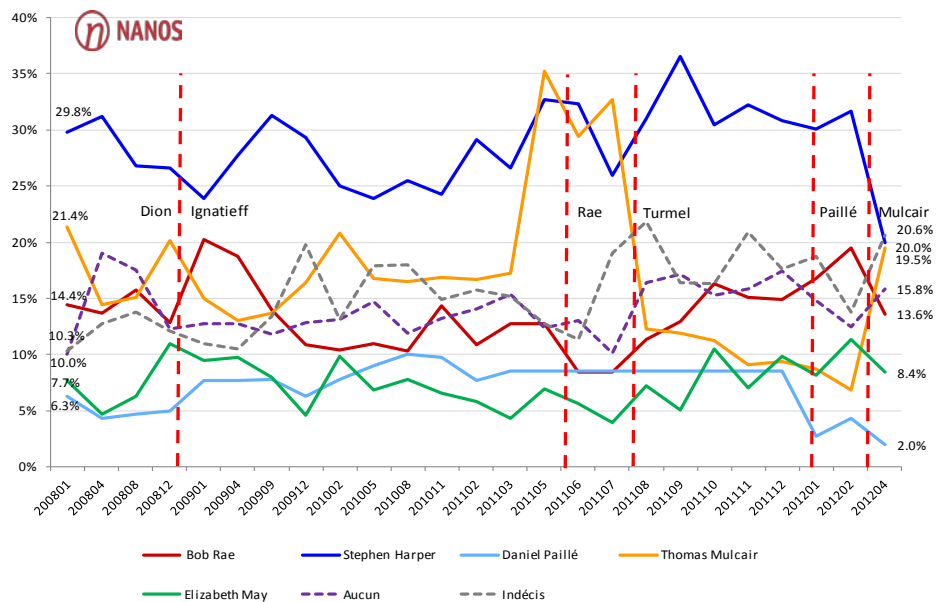
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As you may know, [ROTATE] Bob Rae is the interim leader of the federal Liberal Party, Stephen Harper is the leader of the Conservative Party of Canada, Daniel Paillé is the leader of the Bloc Québécois, Thomas Mulcair is the leader of the federal NDP, and Elizabeth May is leader of the federal Green Party. Which of the federal leaders would you best describe as the most trustworthy leader?



THE MOST TRUSTWORTHY LEADER

Leaders**	Canada		Atlantic*		Quebec		Ontario		Prairies		British Columbia	
	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04
	n=1,203	n=1,200	n=120	n=120	n=304	n=300	n=359	n=360	n=240	n=240	n=180	n=180
	%	%	%	%	%	%	%	%	%	%	%	%
Stephen Harper	31.7	20.0	36.8	24.6	22.2	13.3	31.4	17.2	35.2	32.0	40.4	17.5
Thomas Mulcair***	6.8	19.5	2.8	21.4	12.1	42.5	2.2	11.2	8.1	12.9	7.9	5.6
Bob Rae	19.5	13.6	15.4	8.8	21.8	9.8	24.5	22.6	11.4	6.6	19.5	14.6
Elizabeth May	11.3	8.4	15.2	7.1	4.0	5.0	13.2	8.8	12.0	11.2	16.5	10.6
Daniel Paillé	4.3	2.0	0.8	0.6	9.8	5.4	3.1	0.4	3.2	0.2	1.0	2.9
None of them	12.5	15.8	17.7	14.3	10.2	10.5	11.4	20.4	18.8	15.2	6.8	17.4
Undecided	13.8	20.6	11.3	23.3	19.9	13.5	14.1	19.3	11.3	21.9	7.9	31.5
Margin of error	±2.8	±2.8	±9.1	±9.1	±5.7	±5.7	±5.2	±5.2	±6.4	±6.4	±7.4	±7.4

* Note: Small sample size

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Most Competent Leader



April 27th, 2012

Harper slips, but ahead of Mulcair on competence

METHODOLOGY

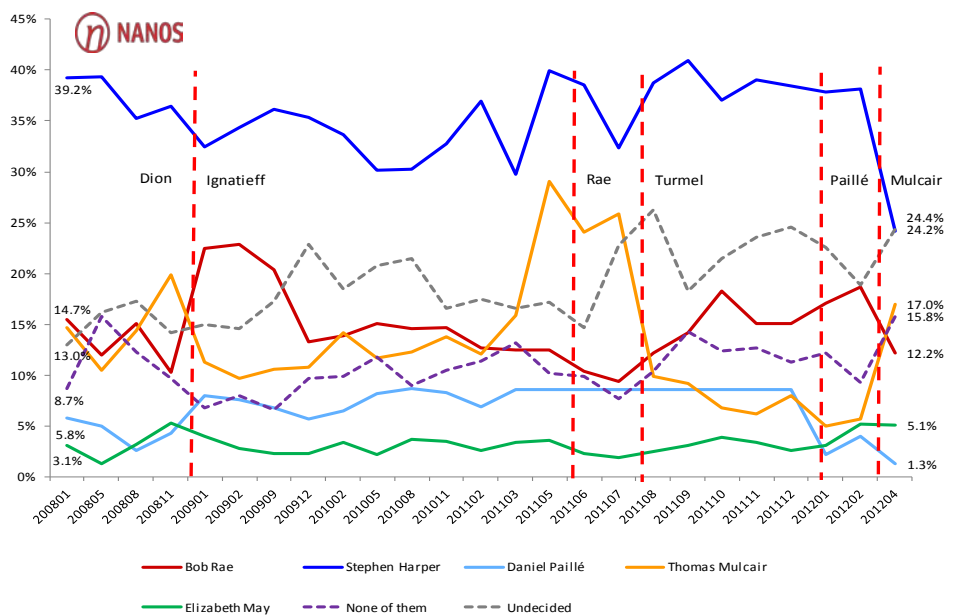
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THE MOST COMPETENT LEADER

Leaders**	Canada		Atlantic*		Quebec		Ontario		Prairies		British Columbia	
	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04
	n=1,203	n=1,200	n=120	n=120	n=304	n=300	n=359	n=360	n=240	n=240	n=180	n=180
	%	%	%	%	%	%	%	%	%	%	%	%
Stephen Harper	38.1	24.2	41.5	29.1	26.2	17.0	41.2	23.4	45.8	30.1	39.9	26.5
Thomas Mulcair***	5.7	17.0	4.1	12.0	8.4	34.3	3.0	9.0	5.7	12.8	7.6	13.2
Bob Rae	18.7	12.2	17.5	12.7	21.5	11.9	23.0	18.5	10.5	7.7	17.1	5.5
Elizabeth May	5.2	5.1	7.5	1.9	1.2	3.2	4.6	8.8	4.9	5.3	12.2	2.8
Daniel Paillé	4.0	1.3	1.6	0.6	8.2	3.2	2.3	0.6	2.0	1.1	4.5	-
None of them	9.3	15.8	9.0	15.2	8.8	8.5	8.3	20.5	15.0	15.6	4.7	19.3
Undecided	18.9	24.4	18.7	28.7	25.8	21.8	17.5	19.2	16.1	27.3	14.0	32.7
Margin of error	±2.8	±2.8	±9.1	±9.1	±5.7	±5.7	±5.2	±5.2	±6.4	±6.4	±7.4	±7.4

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Leader with Best Vision



April 27th, 2012

Harper drops on vision, but ahead of Mulcair

METHODOLOGY

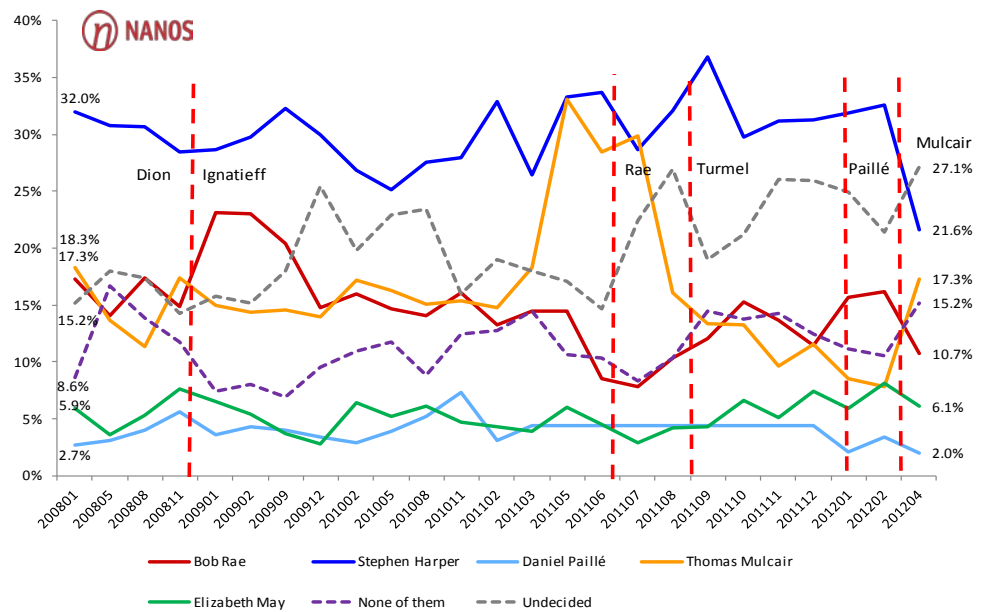
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LEADER WITH BEST VISION FOR CANADA

Leaders**	Canada		Atlantic*		Quebec		Ontario		Prairies		British Columbia	
	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04	2012-02	2012-04
	n=1,203	n=1,200	n=120	n=120	n=304	n=300	n=359	n=360	n=240	n=240	n=180	n=180
	%	%	%	%	%	%	%	%	%	%	%	%
Stephen Harper	32.6	21.6	31.9	20.6	18.2	12.3	33.0	19.4	43.6	35.4	41.9	23.8
Thomas Mulcair***	7.8	17.3	5.5	17.2	13.6	39.7	3.6	9.4	9.6	10.1	5.4	5.6
Bob Rae	16.2	10.7	14.4	14.1	17.5	8.7	22.8	15.6	6.3	5.3	15.2	9.1
Elizabeth May	8.1	6.1	9.4	3.9	3.3	2.5	5.9	6.8	7.9	7.3	20.2	10.3
Daniel Paillé	3.4	2.0	0.8	2.6	7.4	4.5	3.1	-	2.8	1.1	-	2.7
None of them	10.5	15.2	16.2	14.6	9.5	8.2	11.1	22.7	10.5	16.9	7.4	10.1
Undecided	21.4	27.1	21.8	27.1	30.5	24.1	20.5	26.1	19.4	23.9	10.0	38.3
Margin of error	±2.8	±2.8	±9.1	±9.1	±5.7	±5.7	±5.2	±5.2	±6.4	±6.4	±7.4	±7.4

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The Nanos Approach

At Nanos Research, we are experts at helping public-facing companies and organizations connect with the “hearts and minds” of customers or the general public. Our advantage comes from over 20 years experience in understanding the numbers and building upon them to provide strategic insight and intelligence in support of our clients’ business, marketing, public affairs and communications needs.



Getting Started

At Nanos, we believe that small steps can lead to large insights. We are regularly in the field with national omnibus surveys. We'll sit down with you to learn about your challenges and work on your challenge together. The results can be used to conduct a strategic assessment of your current challenge or can be the basis of a broader mission plan for you to achieve your market or mind share objectives.

The Right Solution for the Right Job

- Strategy Retainer
- Strategic Assessment
- Telephone Surveys
- Online Surveys
- eConsultation Polling and Online Dialogue
- Focus Groups
- Elite in-depth interviews
- Mystery Shopping
- Management Consulting



A Trusted Source

Our team is headed by Nik Nanos, a leader in the market and public opinion research industry recognized for the quality of his work, the insightfulness of his counsel and his professional integrity. Media organizations regularly call upon Nik Nanos and Nanos Research to capture the public pulse and analyze complex issues.

For the recent national election, Nanos was the official pollster for CTV News and the Globe and Mail, Canada's national newspaper.



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