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## A MIDSUMMER CHECK-UP

*LITTLE EVIDENCE THAT CANADIANS ARE PAYING ATTENTION TO A PLACID POLITICAL LANDSCAPE*

[Ottawa – July 18, 2013] Nearly 3,000 Canadians generously put down their BBQ tools last week and gave their views on a political landscape which doesn't seem to be producing much interest or movement. Those breathlessly waiting public response to the latest iteration of the Harper Cabinet will have to look elsewhere as this poll was concluded toward the end of last week. But here is a bold prediction. There will be little if any effects in a listless electorate who have gone into political aestivation. Even the North of the Queensway fascination with the continued implosion of the Mike Duffy (all the King's horses, and all the king's men...), not to mention the endless media coverage, doesn't seem to be budging the needles much. Yet there are some points of interest and lessons from this most recent update.

### HIGHLIGHTS

- **Federal vote intention:**
  - ▣ **30.4% Liberal Party**
  - ▣ **28.4% Conservative Party**
  - ▣ **23.4% NDP**
  - ▣ **8.5% Green Party**
  - ▣ **6.3% Bloc Québécois**
  - ▣ **3.1% Other**

*Please note that the methodology is provided at the end of this document.*

First of all, let's note that whatever recent movements we are seeing are modest at best. By far the more profound changes have been the gradual but clear shifts that have occurred in the first half of Stephen Harper's majority mandate. Mr. Harper's majority numbers have been whittled to a humble 28.4 points, suggesting that more than a quarter of his erstwhile supporters have defected. These numbers would see the majority gone and not even a minority in the offing. As challenging as these longer term shifts are for Mr. Harper, they are even more auspicious for the new leader of the Liberal Party who has taken his party from a historical nadir in the last election to a lead in the polls. The longer term trends are not kind for Mr. Mulcair who has seen the high water mark of the last election reduced substantially to the more familiar third place position for his party. We note that these profound shifts since the outset of the mandate are not the products of mercurial gyrations on the electorate but fairly steady and clear trend lines. So is there anything in recent patterns to suggest any interruption in those trends before 2015?

The tracking of the federal vote intention numbers does suggest that something is going on underneath the summer slumber of the electorate. While a few point shifts upward for the Conservative Party is hardly reason to rejoice, it does appear that the media and opposition preoccupation with all things Duffy and Wright hasn't really caused any further decline in Conservative fortunes. In fact, confidence in the direction of the country went up in this poll, possibly in the afterglow of the Canada Day celebrations. Beyond that, there isn't much further good news in the poll for the governing party, but stopping the polling bleeding in the midst of the controversy that has surrounded the government can probably be judged a relative success.

## Federal vote intention

Q. If a federal election were held tomorrow, which party would you vote for?

### National Results



### 2011 Election Results



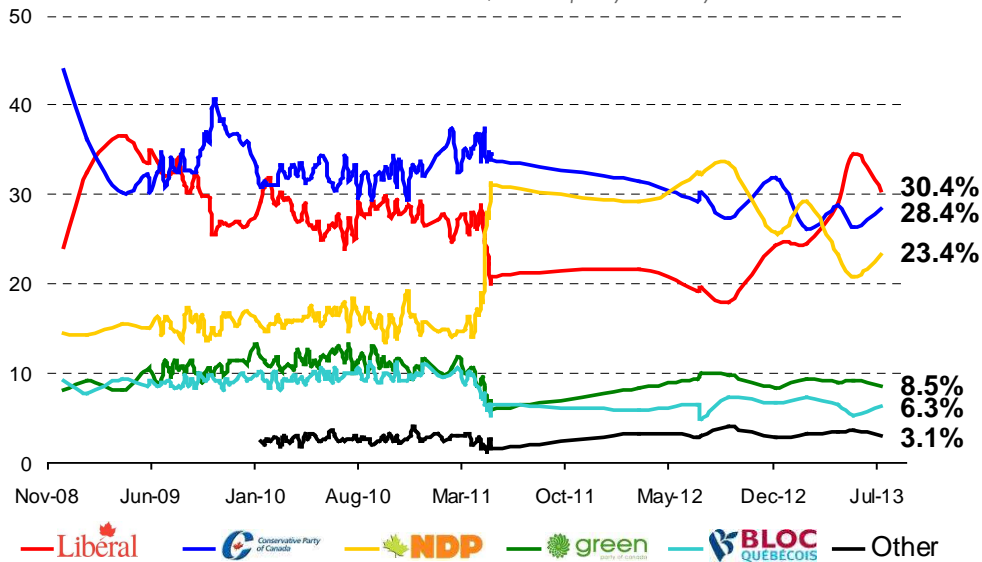
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 17.8% of respondents are undecided and 2.5% are ineligible to vote.

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BASE: Canadians; July 4-9, 2013 (n=2,900)

## Tracking federal vote intention

Q. If a federal election were held tomorrow, which party would you vote for?



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 14.9% of respondents are undecided and 2.1% are ineligible to vote.

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BASE: Canadians; most recent data point July 4-9, 2013 (n=2,900)



Meanwhile, the NDP have shown a similar upward blip (most of the most recent shifts are trajectory shifts so cannot be deemed substantively significant until more polling confirmation). As we shall see the NDP upward movement may be a real one as the approval ratings of the previously moribund Mulcair have risen as have his awareness levels. This was a key problem for Mulcair and the NDP in previous polling and these improvements, while modest, will be very welcome developments.

While it is premature to say that the rose is off the bloom, Justin Trudeau's improbable ascent from the basement to the heir apparent of Canadian politics appears to have hit a bump in the road. His party still leads and his own approval numbers are rising still to far eclipse his two main rivals. This is all very good news. Of mild concern is the nearly insignificant three-point drop, which is more pronounced in the two key regional arenas for the Liberals – Quebec and Ontario. They maintain leads there, but the margins are far less comfortable than they were in our last poll. There has also been a rather abrupt decline in fortunes with new Canadians.

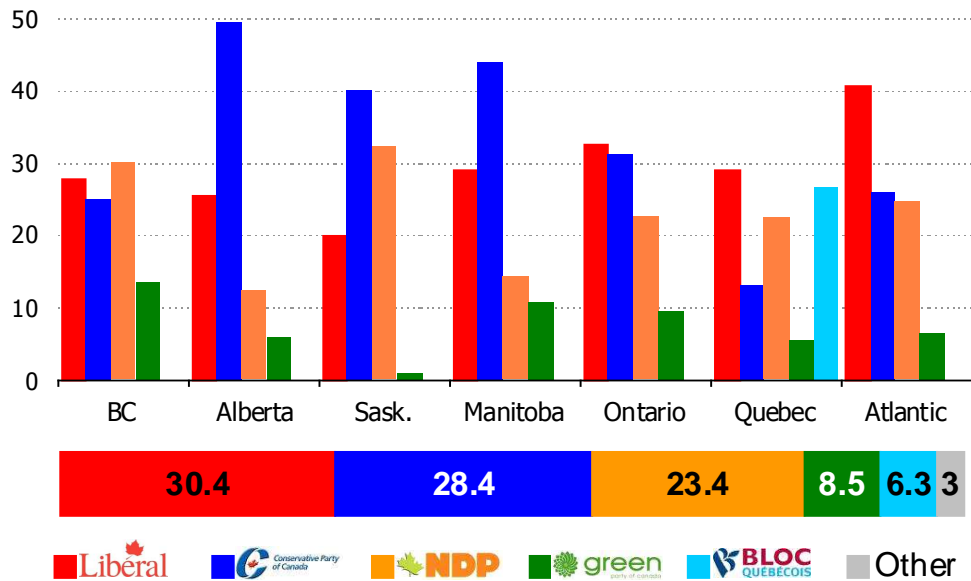
To place these in context these numbers are probably well beyond the expectations of even the most ambitious Liberal dreamers of last summer at this time. Yet the stubbornness of the Conservative vote, in spite so seemingly daunting scandals and challenges, leaves them much closer to returning to power than the Liberals in British Columbia and Ontario and the Progressive Conservatives in Alberta were a year before their unlikely provincial successes. The hidden incumbent premium of risk aversion in a fragile economy is something that needs to be taken into account. Moreover, the resilience of Tom Mulcair only plays into the perfect progressive storm of relatively equally balanced Liberal and NDP parties splitting center and center left votes (along with the nine per cent of progressive vote currently with the Green Party). While Liberals have reasons to be very pleased, they should also have a clear eye on these challenges. It may be that the current results suggest that neither Conservative missteps nor photo ops and BBQ's will be sufficient to achieve Liberal power once again.

The regional patterns are pretty stable, but the Conservative stranglehold on Alberta has strengthened (although the Liberals are in a position where they could aspire to once again have representation from Alberta). The NDP's support is the most even across the country, which could be a mixed blessing in terms of eventual seat efficiency. They must also be concerned about their third place position in Quebec which yielded the lion's share of their 2011 success. The Liberals lead clearly in the Atlantic and have a modest lead in Quebec. Their Ontario lead is very slight right now (and down significantly from two months ago). They are in a tight three-way race in British Columbia, but as we learned from their provincial election earlier this year, what British Columbia voters tell us in does not always match up with how they actually vote.



## Vote intention by key demographics

Q. If a federal election were held tomorrow, which party would you vote for?



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BASE: Canadians; July 4-9, 2013 (n=2,900)

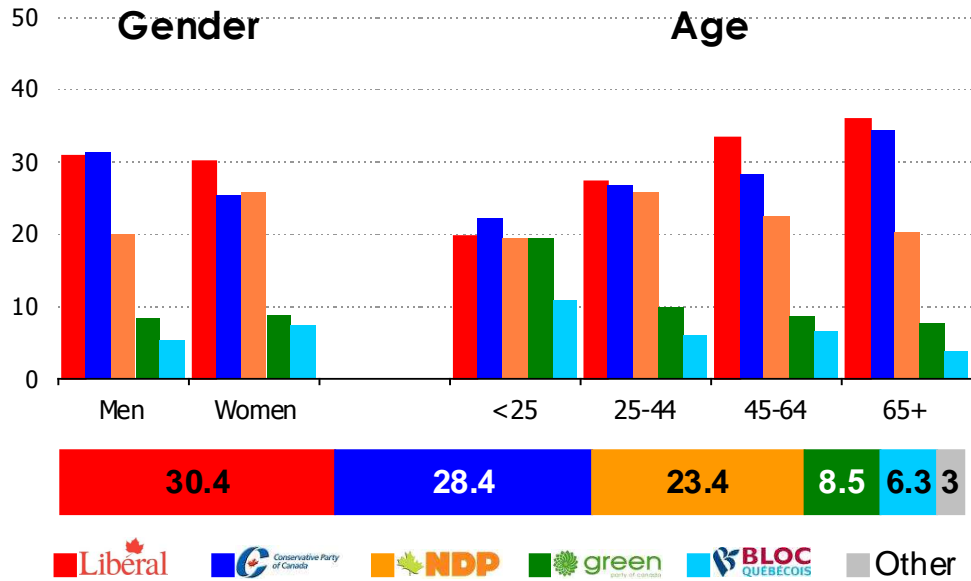
Turning to the gender and age splits, we find few surprises. The Liberals are doing very well with seniors, a demographic that has been key to Conservative success over the past few years. Despite the youth and charisma of their new leader, however, the Liberals are failing to make inroads with the younger generations, who, for the moment, are split evenly among Canada's four federalist parties. The Conservative Party is statically tied with the Liberal party among men, but ranks third among women. There is also a substantial gender gap within the NDP ranks, with 56 per cent of their supporters identifying themselves as female.

In an unexpected turn of events, however, we also see that the Conservatives now lead (albeit insignificantly) with Canada's foreign-born population. This finding represents dramatic reversal of what we saw not two months ago when the Liberals led this group 42 to 26.



## Vote intention by gender and age

Q. If a federal election were held tomorrow, which party would you vote for?

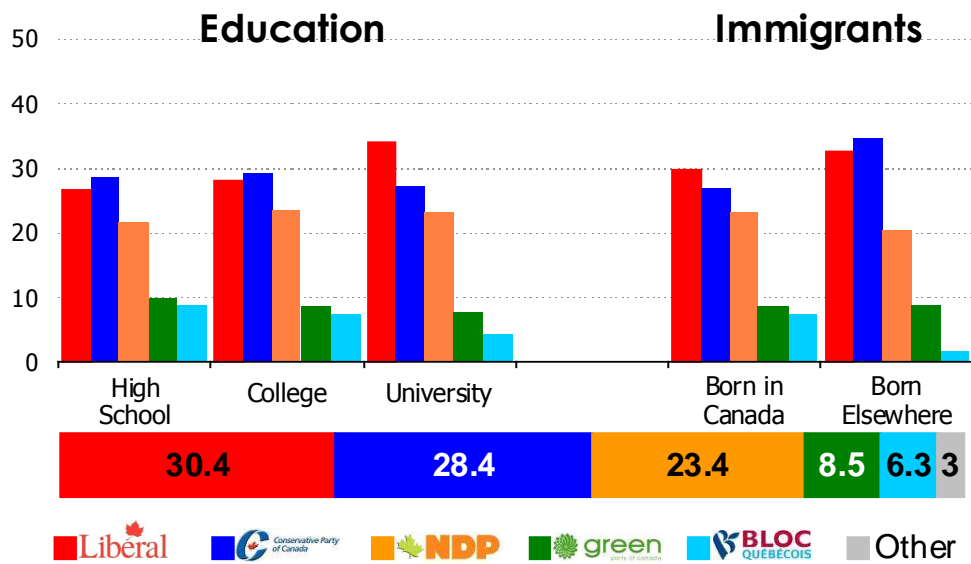


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BASE: Canadians; July 4-9, 2013 (n=2,900)

## Vote intention by education/country of birth

Q. If a federal election were held tomorrow, which party would you vote for?



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BASE: Canadians; July 4-9, 2013 (n=2,900)



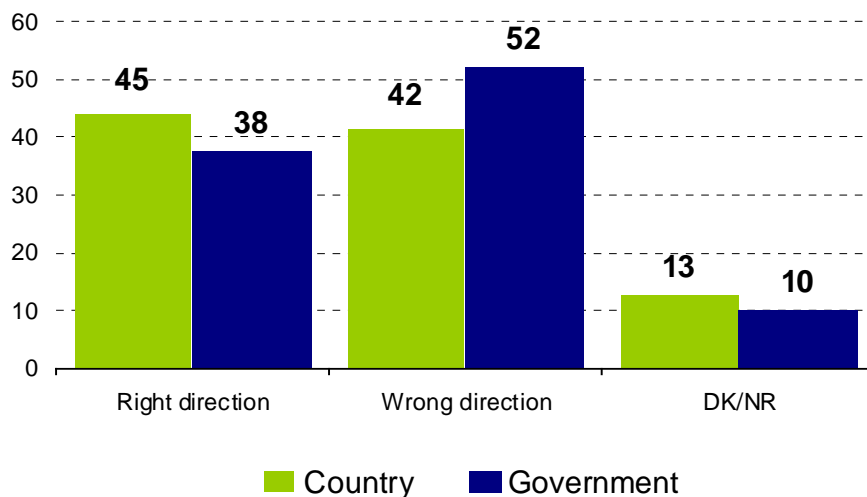
So what is behind this sudden uptick in Conservative fortunes? Turning to directional measures, we see a marked improvement in Canadians' satisfaction with where their country and government are headed. Direction of country has recovered from its all-time low and the plurality of Canadians now feel the country is moving in the right direction. Similarly, we have seen a six-point improvement in satisfaction with direction of government.

Before we proceed any further, it is important to keep in mind that satisfaction with direction of country and government are still quite low by historical standards. Nevertheless, these results bode well for the Conservative Party, as directional measures are often indicative of future movements in vote intention.

So what is behind these movements? There are a number of factors that could be at play. With media attention on the various Senate scandals beginning to dissipate, this could simply be a sign that things could be "returning to normal", as it were. A more plausible explanation, however, is that in the wake of Canada Day, with its myriad of celebrations endless displays of red and white, has re-kindled Canadians' appreciation for the country in which they live – at least for the time being. Regardless of the whatever flaws that may afflict this country and its government, Canada Day has given us all the chance to set aside our political beliefs and celebrate the fact that life in this country is really not all that bad.

## Direction of country/government

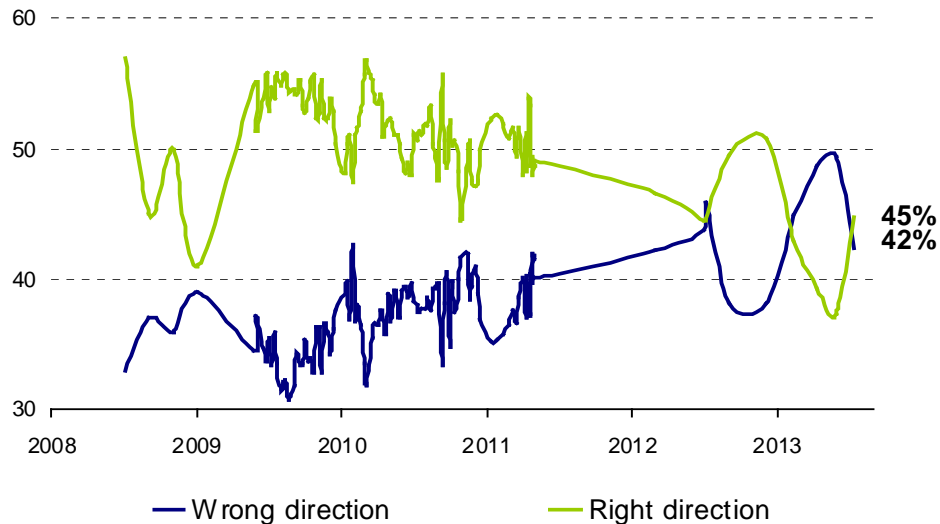
Q. All things considered, would you say the country/government is moving in the right direction or the wrong direction?





## Direction of country

Q. All things considered, would you say the country is moving in the right direction or the wrong direction?

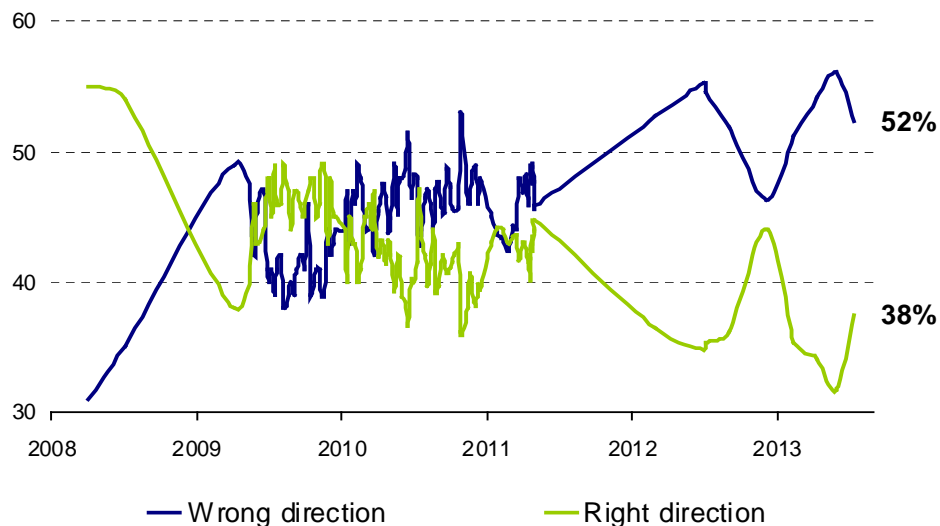


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BASE: Canadians (half-sample); July 4-9, 2013 (n=1,423)

## Direction of government






Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?



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BASE: Canadians (half-sample); July 4-9, 2013 (n=1,477)


**Detailed Tables:**






<b>National Federal Vote Intention (decided and leaning voters only)</b>								
<i>Q. If a federal election were held tomorrow, which party would you vote for? [If undecided] Even if you do not have a firm idea, are you leaning towards a party? [If yes] As it stands, towards which party are you leaning?</i>								
	 <b>Liberal</b>	 <b>Conservative Party of Canada</b>	 <b>NDP</b>	 <b>green</b>	 <b>BLOC</b> QUEBÉCOIS	Other	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>30.4%</b>	<b>28.4%</b>	<b>23.4%</b>	<b>8.5%</b>	<b>6.3%</b>	<b>3.1%</b>	<b>2429</b>	<b>2.0</b>
<b>REGION</b>								
British Columbia	27.7%	25.1%	31.0%	13.6%	0.0%	2.6%	343	5.3
Alberta	25.5%	49.5%	12.5%	6.0%	0.0%	6.5%	272	5.9
Saskatchewan	19.9%	40.2%	33.3%	1.1%	0.0%	5.5%	86	10.6
Manitoba	29.1%	43.9%	15.0%	10.9%	0.0%	1.2%	77	11.2
Ontario	32.7%	31.4%	23.5%	9.7%	0.0%	2.7%	701	3.7
Quebec	29.0%	13.1%	23.1%	5.5%	26.7%	2.7%	767	3.5
Atlantic Canada	40.5%	25.9%	25.3%	6.5%	0.0%	1.8%	180	7.3
<b>GENDER</b>								
Male	30.7%	31.2%	20.5%	8.3%	5.4%	3.9%	1196	2.8
Female	30.1%	25.2%	26.5%	8.8%	7.3%	2.2%	1226	2.8
<b>AGE</b>								
<25	19.6%	22.2%	20.0%	19.4%	10.9%	7.8%	131	8.6
25-44	27.2%	26.8%	26.3%	9.9%	6.1%	3.7%	599	4.0
45-64	33.3%	28.2%	23.1%	6.5%	6.6%	2.2%	975	3.1
65+	35.8%	34.4%	20.8%	4.1%	3.8%	1.2%	718	3.7
<b>EDUCATION</b>								
High school or less	26.8%	28.7%	22.1%	9.9%	8.7%	3.9%	635	3.9
College or CEGEP	28.0%	29.3%	24.0%	8.6%	7.3%	2.8%	793	3.5
University or higher	34.2%	27.3%	23.9%	7.6%	4.3%	2.7%	993	3.1
<b>COUNTRY OF BIRTH</b>								
Canada	29.9%	27.1%	23.9%	8.4%	7.2%	3.5%	2050	2.2
Other	32.6%	34.6%	21.0%	8.9%	1.8%	1.0%	378	5.0





**National Federal Vote Intention (continued)**

*Q. If a federal election were held tomorrow, which party would you vote for?  
 [If undecided] Even if you do not have a firm idea, are you leaning towards a party?  
 [If yes] As it stands, towards which party are you leaning?*

	 Liberal	 Conservative Party of Canada	 NDP	 green Party of Canada	 BLOC QUEBÉCOIS	Other	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>30.4%</b>	<b>28.4%</b>	<b>23.4%</b>	<b>8.5%</b>	<b>6.3%</b>	<b>3.1%</b>	<b>2429</b>	<b>2.0</b>
VOTE IN 2011 ELECTION								
Did not vote	26.1%	29.7%	17.9%	14.4%	6.7%	5.3%	337	5.3
Conservative Party	17.9%	70.8%	7.0%	1.8%	1.0%	1.5%	695	3.7
NDP	24.5%	3.6%	61.3%	5.6%	2.7%	2.3%	542	4.2
Liberal Party	71.4%	9.5%	12.6%	4.2%	1.3%	1.1%	456	4.6
Green Party	19.7%	5.2%	17.5%	51.6%	4.4%	1.5%	109	9.4
Bloc Québécois	8.5%	5.2%	12.3%	4.5%	67.0%	2.5%	171	7.5
Other	7.3%	10.8%	28.0%	19.5%	4.8%	29.5%	52	13.6


**Direction of Country**

*Q. All things considered, would you say the country is moving in the right direction or the wrong direction?*

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>44.8%</b>	<b>42.4%</b>	<b>12.7%</b>	<b>1423</b>	<b>2.6</b>
<b>REGION</b>					
British Columbia	45.6%	41.7%	12.7%	202	6.9
Alberta	51.2%	32.1%	16.8%	156	7.9
Saskatchewan	48.7%	40.1%	11.2%	56	13.1
Manitoba	44.1%	46.3%	9.6%	53	13.5
Ontario	44.8%	44.7%	10.5%	422	4.8
Quebec	43.9%	43.1%	13.0%	424	4.8
Atlantic Canada	34.9%	43.8%	21.2%	107	9.5
<b>GENDER</b>					
Male	47.4%	42.7%	9.9%	653	3.8
Female	43.9%	43.7%	12.4%	735	3.6
<b>AGE</b>					
<25	42.8%	42.6%	14.6%	86	10.6
25-44	42.4%	45.6%	11.9%	368	5.1
45-64	45.8%	44.4%	9.8%	534	4.2
65+	51.8%	37.7%	10.5%	405	4.9
<b>EDUCATION</b>					
High school or less	44.2%	38.6%	17.2%	383	5.0
College or CEGEP	48.5%	43.1%	8.4%	454	4.6
University or higher	44.2%	46.6%	9.2%	553	4.2
<b>COUNTRY OF BIRTH</b>					
Canada	43.6%	44.9%	11.5%	1181	2.9
Other	55.4%	34.3%	10.4%	219	6.6
<b>CURRENT VOTE INTENTION</b>					
Liberal Party	38.8%	51.2%	10.0%	382	5.0
Conservative Party	78.1%	14.9%	7.1%	331	5.4
NDP	28.5%	62.7%	8.9%	250	6.2
Green Party	38.4%	53.2%	8.4%	88	10.5
Bloc Quebecois	44.1%	40.7%	15.2%	105	9.6
Other	12.9%	71.0%	16.1%	35	16.6



**Direction of Government**

*Q. All things considered, would you say the Government of Canada is moving in the right direction or the wrong direction?*

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>37.5%</b>	<b>52.3%</b>	<b>10.2%</b>	<b>1477</b>	<b>2.6</b>
<b>REGION</b>					
British Columbia	42.6%	46.1%	11.3%	198	7.0
Alberta	47.0%	36.6%	16.4%	174	7.4
Saskatchewan	38.1%	49.1%	12.8%	58	12.9
Manitoba	32.2%	66.1%	1.6%	39	15.7
Ontario	40.6%	52.3%	7.0%	408	4.9
Quebec	26.7%	61.1%	12.3%	484	4.5
Atlantic Canada	34.9%	56.4%	8.8%	114	9.2
<b>GENDER</b>					
Male	41.7%	51.8%	6.5%	694	3.7
Female	34.7%	54.7%	10.7%	756	3.6
<b>AGE</b>					
<25	43.9%	45.6%	10.6%	82	10.8
25-44	33.4%	58.7%	7.9%	349	5.3
45-64	38.2%	55.6%	6.3%	600	4.0
65+	43.2%	43.8%	13.1%	415	4.8
<b>EDUCATION</b>					
High school or less	41.2%	48.7%	10.1%	412	4.8
College or CEGEP	39.5%	51.1%	9.4%	477	4.5
University or higher	34.9%	58.1%	7.0%	559	4.1
<b>COUNTRY OF BIRTH</b>					
Canada	35.8%	56.0%	8.1%	1219	2.8
Other	48.9%	39.1%	12.0%	236	6.4
<b>CURRENT VOTE INTENTION</b>					
Conservative Party	28.2%	62.9%	8.9%	384	5.0
NDP	79.6%	15.8%	4.6%	344	5.3
Liberal Party	20.9%	71.8%	7.3%	312	5.6
Green Party	15.8%	77.1%	7.0%	80	11.0
Bloc Quebecois	20.6%	74.4%	5.0%	91	10.3
Other	14.5%	79.8%	5.6%	27	18.9



## Methodology:

This study was conducted using Interactive Voice Response (IVR) technology, which allows respondents to enter their preferences by punching the keypad on their phone, rather than telling them to an operator.

In an effort to reduce the coverage bias of landline only RDD, we created a dual landline/cell phone RDD sampling frame for this research. As a result, we are able to reach those with a landline and cell phone, as well as cell phone only households and landline only households. This methodology is not to be confused with the increasing proliferation of non-probability opt-in online panels which have recently been incorrectly reported in major national media with inappropriate margin of error estimates.

The field dates for this survey are July 4-9, 2013. In total, a random sample of 2,900 Canadian adults aged 18 and over responded to the survey (including a sub-sample of 2,429 decided voters). The margin of error associated with the total sample is +/-1.8 percentage points, 19 times out of 20.

Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as sex, age, education and region). All the data have been statistically weighted to ensure the sample's composition reflects that of the actual population of Canada according to Census data.