

CONSERVATIVES PULLING AWAY FROM MORIBUND LIBERALS

SOME NOTABLE CHANGES IN BROADER OUTLOOK

[Ottawa – November 25, 2010] – In a familiar pattern, the Conservatives are once again establishing a significant lead over the faltering Liberal party who now appear to be chronically rebuffed by the electorate as they try to move past the Conservatives. Each time the Liberal Party appears to be moving to parity and threatening to crack the once humble 30-point ceiling, they are brought down to the historical low levels of the last election. The Conservatives are now very close to their moving average over the past year, which is still well short of their achievement in the last election.

The one in three voters who support the Conservatives have a very defined profile. In the rest of the spectrum, however, there is little clarity in the demographics and a sense that the non-Conservative vote is casting around among the various alternatives trying to find a home for their fairly significant discontent with the country and federal direction. In particular, women are a much more fluid vote and show a much lower level of certainty or connection with the various choices out there. This is also true of the voting groups which follow the boomers in age. Both the East and West Coasts are showing high volatility with more settled patterns now evident from Quebec to Alberta.

The Conservatives reveal very strong support among their familiar constituencies: seniors, men, those born in Canada, and those with middle levels of socioeconomic status. The Conservatives also have enough support in Alberta to win most of the seats twice. Liberal support, on the other hand, shows no clear patterns with the exception of the university educated, non-Canadian born, and Ontario. NDP support is now enormously concentrated in women and residents of BC and Saskatchewan/Manitoba. The Greens are off somewhat but doing very well among younger voters and better in BC. The Bloc are doing well in Quebec on the strength of younger voters and draw virtually all of their support from Francophones. In frustration, perhaps, we have seen a rise in support for the nebulous "other" category which, along with the casting among non-Conservative

HIGHLIGHTS

- **National federal vote intention:**
 - ☒ 33.3% CPC
 - ☒ 27.1% LPC
 - ☒ 16.6% NDP
 - ☒ 9.5% Green
 - ☒ 9.5% BQ
 - ☒ 4.0% other
- **Direction of country:**
 - ☒ 47.5% right direction
 - ☒ 39.5% wrong direction
 - ☒ 13.0% DK/NR
- **Direction of government:**
 - ☒ 40.2% right direction
 - ☒ 47.5% wrong direction
 - ☒ 12.3% DK/NR
- **Ideology:**
 - ☒ 32% small "l" liberal
 - ☒ 28% small "c" conservative
 - ☒ 40% neither
- **Trust in government:**
 - ☒ 5% almost always
 - ☒ 28% most of the time
 - ☒ 44% only some of the time
 - ☒ 24% never

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

supporters, may reveal the lack of clarity and direction outside of the Conservative base.

The recent fluctuations in the electorate are interesting but hardly conclusive. Although the Conservatives are now in a much better position than in our last polling period, they were barely ahead of the margin of error in the first week of polling. The volatility in some regions (such as BC) renders the poll to poll comparisons almost meaningless statistically. Far more interesting is the broader societal and economic outlook underpinning this relatively perpetually gridlocked political landscape where the Conservatives remain dominant with the rather underwhelming support of just one in three voters.

Outlook on the country and the federal government remains tepid at best. Slightly less than half the public are happy with broad national direction and only two fifths are pleased with federal direction. Notably, Conservative supporters are very happy with both, but there is little cheer elsewhere. It is notable that the most extreme levels of discontent with direction occur outside of Liberal support (Green, NDP, Bloc and other supporters). The volatility in BC may reflect continued unhappiness with national and federal trajectory although the other most critical region is Quebec which seems to have settled on a fairly stable pattern of support for the Bloc, and a pretty sound rejection of the Conservatives.

Tracking on political ideology also presents some interesting results. There has been a sharp rise in the proportion of Canadians who say they are neither liberal nor conservative. Meanwhile, the proportion of small "l" liberals is down, it is still higher than the proportion of those who consider themselves small "c" conservatives.

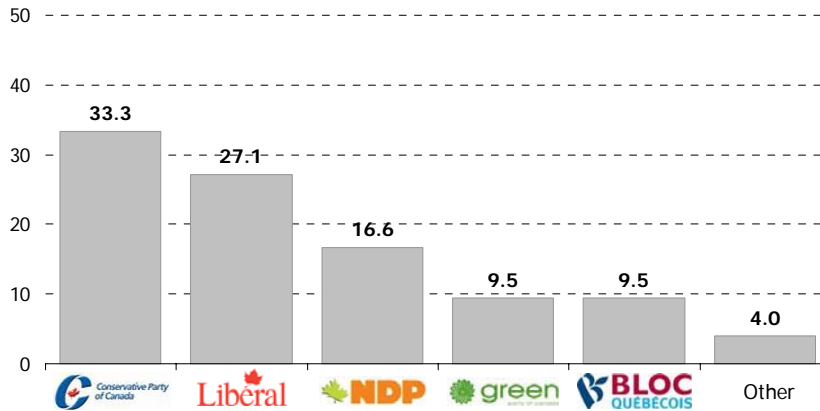
Respondents from Alberta are most likely to identify themselves as conservative, while those from Ontario are most likely to see themselves as liberal. Residents of BC, Quebec, and Atlantic Canada, meanwhile, are most likely to see themselves as neither. University graduates are more likely to be liberal, while the Generation X age group appears to have rallied around the centre of the political spectrum, opting to define themselves as neither liberal nor conservative. Men appear to be more conservative, while women are adverse to either label, further evidence that this group lacks any clear identification with ideological camps.

Lastly, trust in government has fallen to its lowest level since the Conservatives took office, though it still remains relatively high compared to the early 1990s. Results are split largely along party lines, with Conservatives expressing the highest levels of trust, while NDP, Green, and Bloc supporters are the most distrustful. Youth, men, Albertans, and college graduates all expressed a moderate degree of trust in the government, while women and university graduates show a relatively stronger sense of scepticism.

Top Line Results:

Federal vote intention: November 17-23

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



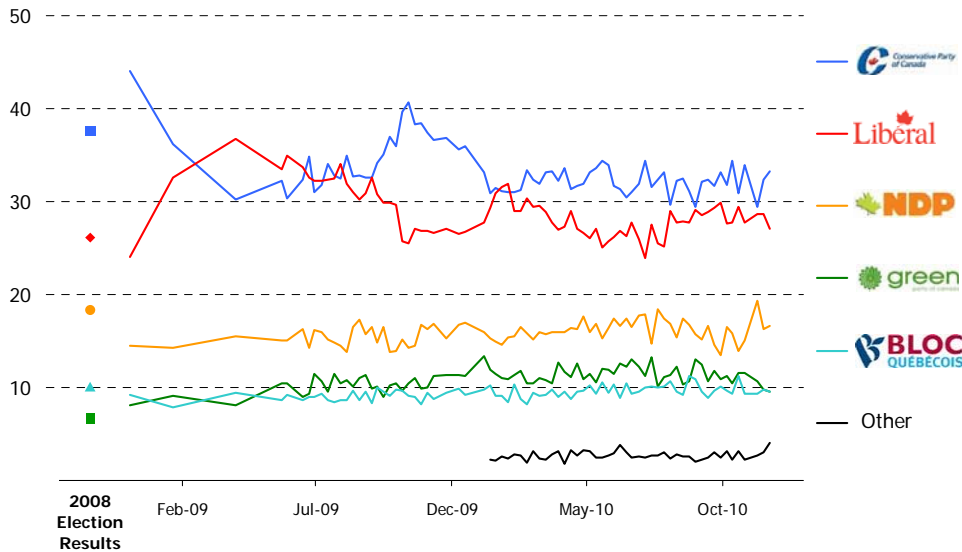
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 15.9% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; November 17-23, 2010 (n=1,696)

Weekly tracking of federal vote intention

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



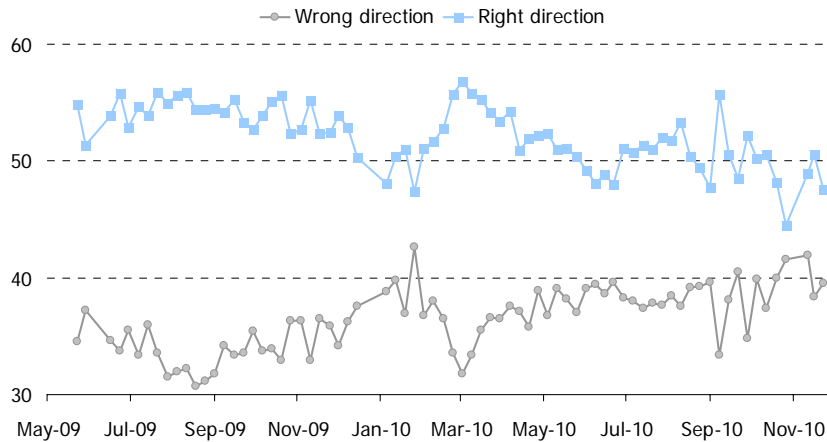
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 15.9% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; most recent data point November 17-23, 2010 (n=1,696)

Direction of country

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

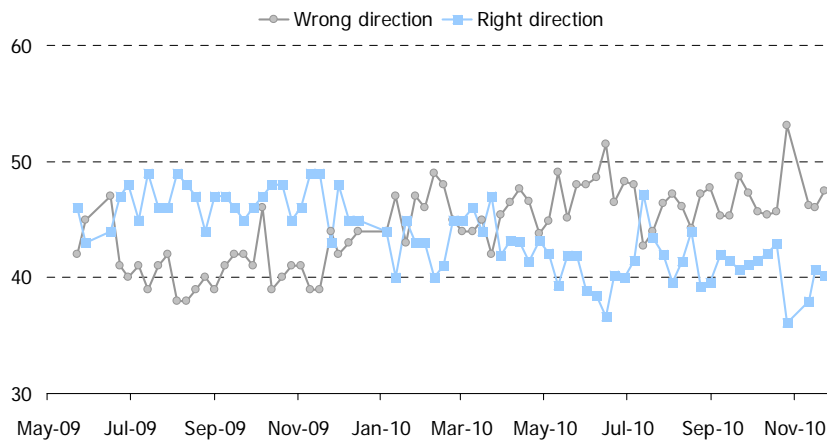


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BASE: Canadians; most recent data point November 17-23, 2010 (n=half sample)

Direction of government

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

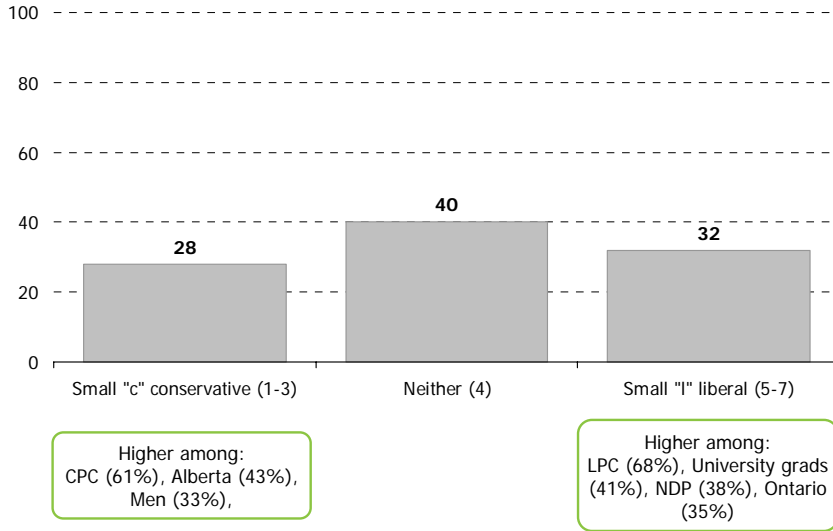


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BASE: Canadians; most recent data point November 17-23, 2010 (n=half sample)

Political ideology

Q. Do you consider yourself a small "c" conservative or a small "l" liberal?

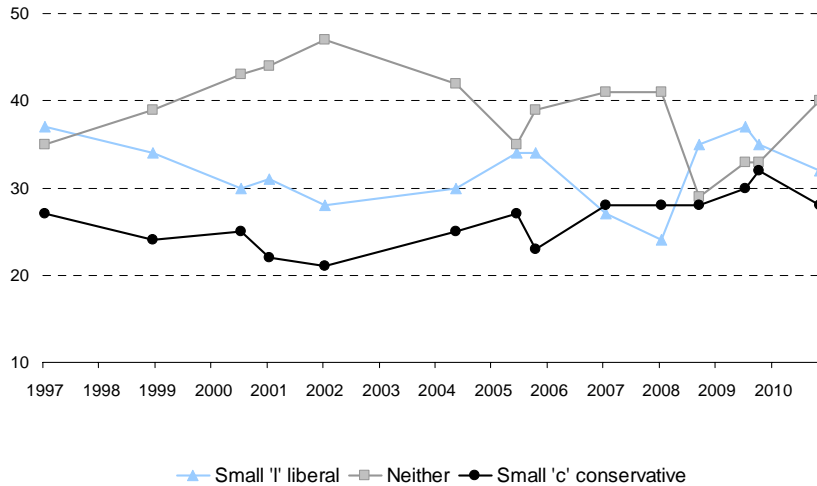


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BASE: Canadians; November 17-23, 2010 (n=1,973)

Tracking political ideology

Q. Do you consider yourself a small "c" conservative or a small "l" liberal?

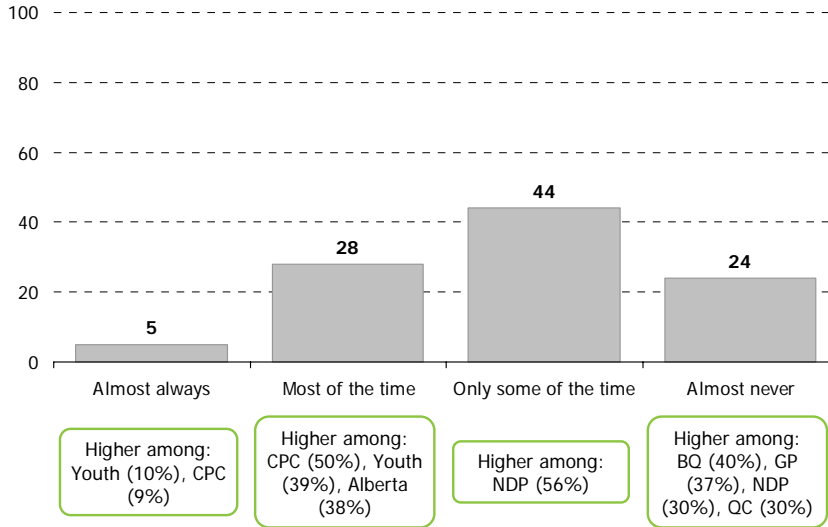


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BASE: Canadians; most recent data point November 17-23, 2010 (n=1,973)

Trust in government

Q. How much do you trust the government in Ottawa to do what is right?

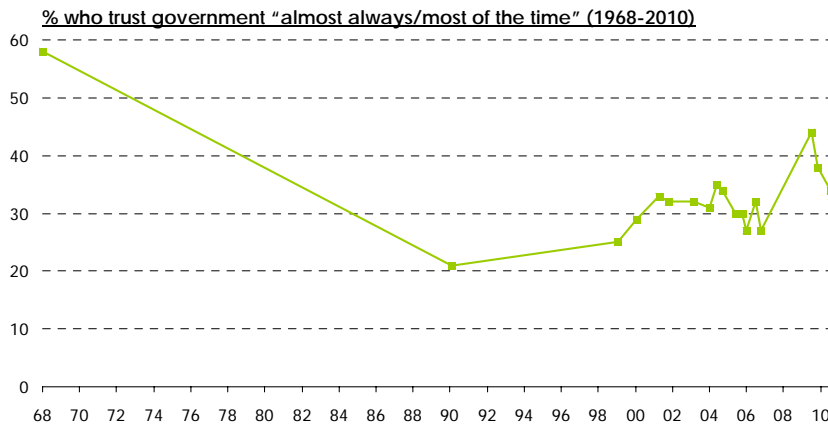


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BASE: Canadians; most recent data point November 17-23, 2010 (n=1,973)

Detailed Tables:

National Federal Vote Intention								
<i>Q. If a federal election were held tomorrow, which party would you vote for?</i>								
						Other	Sample Size	Margin of Error (+/-)
NATIONALLY	33.3%	27.1%	16.6%	9.5%	9.5%	4.0%	1696	2.4
REGION								
British Columbia	35.7%	15.4%	29.2%	14.4%	0.0%	5.3%	110	9.3
Alberta	66.4%	13.5%	10.7%	6.3%	0.0%	3.0%	119	9.0
Saskatchewan/Manitoba	35.1%	25.3%	25.9%	12.5%	0.0%	1.1%	101	9.8
Ontario	35.5%	35.5%	15.6%	9.4%	0.0%	4.0%	663	3.8
Quebec	14.1%	23.5%	12.8%	8.4%	37.4%	3.8%	584	4.1
Atlantic Canada	38.9%	35.2%	12.5%	6.9%	0.0%	6.4%	119	9.0
GENDER								
Male	39.3%	26.8%	13.1%	8.3%	8.3%	4.3%	832	3.4
Female	27.5%	27.5%	19.9%	10.7%	10.7%	3.7%	864	3.3
AGE								
<25	25.0%	23.3%	12.3%	20.7%	10.7%	8.0%	102	9.7
25-44	28.6%	26.1%	17.1%	10.8%	13.3%	4.1%	546	4.2
45-64	36.6%	25.7%	20.8%	6.6%	7.5%	2.9%	683	3.8
65+	40.4%	34.1%	9.6%	6.6%	5.8%	3.5%	365	5.1
EDUCATION								
High school or less	30.3%	21.3%	19.0%	13.2%	11.5%	4.7%	440	4.7
College or CEGEP	39.7%	23.1%	14.5%	7.2%	10.2%	5.3%	555	4.2
University or higher	30.0%	33.5%	16.8%	9.2%	7.9%	2.6%	701	3.7
METROPOLITAN CANADA								
Vancouver	36.5%	20.7%	18.4%	15.6%	0.0%	8.7%	31	17.6
Calgary	51.7%	26.8%	11.0%	4.7%	0.0%	5.8%	21	21.4
Toronto	36.1%	39.6%	15.1%	5.1%	0.0%	4.1%	182	7.3
Ottawa	45.3%	28.2%	12.1%	14.3%	0.0%	0.0%	60	12.7
Montreal	12.1%	30.0%	10.5%	10.1%	32.9%	4.4%	179	7.3





Federal Vote Intention – British Columbia

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

					Other	Sample Size	Margin of Error (+/-)
OVERALL	35.7%	15.4%	29.2%	14.4%	5.3%	110	9.3
GENDER							
Male	37.4%	24.0%	17.7%	13.6%	7.3%	59	12.8
Female	30.0%	13.6%	24.7%	25.5%	6.2%	51	13.7
AGE							
<25	0.0%	24.7%	0.0%	37.7%	37.7%	3	56.6
25-44	36.1%	13.3%	19.7%	23.4%	7.5%	21	21.4
45-64	32.6%	14.5%	32.6%	18.5%	1.9%	51	13.7
65+	41.2%	29.5%	9.9%	13.9%	5.5%	35	16.6
EDUCATION							
High school or less	24.3%	7.2%	38.4%	26.3%	3.9%	23	20.4
College or CEGEP	38.1%	20.2%	15.0%	8.2%	18.5%	36	16.3
University or higher	34.1%	21.9%	18.6%	25.3%	0.0%	51	13.7





Federal Vote Intention – Alberta

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

					Other	Sample Size	Margin of Error (+/-)
OVERALL	66.4%	13.5%	10.7%	6.3%	3.0%	119	9.0
GENDER							
Male	70.7%	12.0%	10.1%	3.8%	3.5%	53	13.5
Female	57.6%	17.3%	10.4%	11.5%	3.2%	66	12.1
AGE							
<25	73.7%	26.3%	0.0%	0.0%	0.0%	3	56.6
25-44	59.9%	5.9%	17.3%	10.9%	5.9%	34	16.8
45-64	59.1%	16.7%	11.4%	9.4%	3.4%	55	13.2
65+	73.4%	22.8%	0.0%	3.8%	0.0%	27	18.9
EDUCATION							
High school or less	72.8%	8.4%	11.7%	3.9%	3.3%	26	19.2
College or CEGEP	69.4%	13.7%	5.6%	5.3%	6.0%	51	13.7
University or higher	49.6%	20.6%	15.3%	14.5%	0.0%	42	15.1





Federal Vote Intention – Saskatchewan/Manitoba

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

					Other	Sample Size	Margin of Error (+/-)
OVERALL	35.1%	25.3%	25.9%	12.5%	1.1%	101	9.8
GENDER							
Male	40.5%	23.0%	18.2%	18.3%	0.0%	49	14.0
Female	36.3%	14.4%	31.9%	15.3%	2.1%	52	13.6
AGE							
<25	34.3%	0.0%	0.0%	65.7%	0.0%	3	56.6
25-44	33.7%	13.5%	32.4%	20.5%	0.0%	40	15.5
45-64	45.7%	27.2%	21.9%	5.2%	0.0%	35	16.6
65+	39.3%	25.8%	21.7%	4.1%	9.0%	23	20.4
EDUCATION							
High school or less	38.9%	16.1%	26.1%	18.8%	0.0%	32	17.3
College or CEGEP	46.2%	9.4%	33.2%	11.3%	0.0%	30	17.9
University or higher	31.5%	27.3%	18.9%	19.4%	2.8%	39	15.7






Federal Vote Intention – Ontario

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

					Other	Sample Size	Margin of Error (+/-)
OVERALL	35.5%	35.5%	15.6%	9.4%	4.0%	663	3.8
GENDER							
Male	41.0%	31.3%	13.3%	9.8%	4.5%	341	5.3
Female	29.9%	38.4%	19.1%	9.1%	3.5%	322	5.5
AGE							
<25	21.5%	23.8%	21.4%	26.4%	6.8%	41	15.3
25-44	30.0%	38.9%	15.6%	11.5%	4.0%	194	7.0
45-64	42.1%	32.2%	17.4%	5.0%	3.2%	278	5.9
65+	40.2%	40.1%	11.0%	4.6%	4.1%	150	8.0
EDUCATION							
High school or less	37.0%	26.1%	18.1%	13.2%	5.5%	142	8.2
College or CEGEP	36.0%	33.1%	17.9%	9.4%	3.6%	204	6.9
University or higher	34.4%	39.9%	14.2%	7.8%	3.6%	317	5.5





Federal Vote Intention – Quebec

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

						Other	Sample Size	Margin of Error (+/-)
OVERALL	14.1%	23.5%	12.8%	8.4%	37.4%	3.8%	584	4.1
GENDER								
Male	19.9%	23.3%	12.0%	5.6%	35.2%	4.1%	276	5.9
Female	9.8%	23.9%	13.4%	10.2%	39.2%	3.6%	308	5.6
AGE								
<25	22.0%	26.2%	6.8%	12.2%	29.3%	3.4%	47	14.3
25-44	9.4%	19.4%	17.0%	8.1%	41.6%	4.5%	235	6.4
45-64	16.2%	23.7%	11.8%	6.4%	37.4%	4.6%	206	6.8
65+	18.8%	30.5%	9.5%	6.8%	33.2%	1.2%	96	10.0
EDUCATION								
High school or less	16.5%	23.6%	6.8%	12.3%	36.5%	4.3%	174	7.4
College or CEGEP	15.4%	22.7%	10.5%	7.6%	39.6%	4.3%	193	7.1
University or higher	13.2%	24.5%	19.3%	4.5%	35.5%	3.0%	217	6.7

Federal Vote Intention – Atlantic Canada

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

					Other	Sample Size	Margin of Error (+/-)
OVERALL	38.9%	35.2%	12.5%	6.9%	6.4%	119	9.0
GENDER							
Male	37.4%	35.8%	9.4%	9.3%	8.1%	54	13.3
Female	38.3%	32.7%	17.3%	5.6%	6.1%	65	12.2
AGE							
<25	40.5%	0.0%	21.4%	19.1%	19.1%	5	43.8
25-44	30.3%	41.6%	16.4%	3.8%	8.0%	22	20.9
45-64	44.6%	32.9%	12.3%	5.2%	5.0%	58	12.9
65+	32.7%	38.2%	11.3%	11.6%	6.1%	34	16.8
EDUCATION							
High school or less	42.4%	32.6%	6.9%	10.3%	7.8%	43	14.9
College or CEGEP	41.5%	21.2%	25.7%	4.2%	7.4%	41	15.3
University or higher	28.9%	50.1%	8.1%	7.2%	5.7%	35	16.6

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 (+/-)
NATIONALLY	47.5%	39.5%	13.0%	961	3.2
REGION					
British Columbia	56.7%	25.1%	18.1%	63	12.4
Alberta	57.3%	31.7%	10.9%	66	12.1
Saskatchewan/Manitoba	40.1%	32.7%	27.3%	56	13.1
Ontario	50.7%	37.6%	11.8%	361	5.2
Quebec	40.2%	51.8%	7.9%	331	5.4
Atlantic Canada	37.3%	46.9%	15.8%	84	10.7
GENDER					
Male	50.3%	39.3%	10.4%	469	4.5
Female	44.7%	39.7%	15.6%	492	4.4
AGE					
<25	61.0%	28.1%	10.9%	70	11.7
25-44	42.6%	44.1%	13.4%	307	5.6
45-64	49.5%	41.5%	8.9%	368	5.1
65+	43.6%	36.2%	20.2%	216	6.7
EDUCATION					
High school or less	41.9%	42.6%	15.5%	254	6.2
College or CEGEP	48.3%	41.0%	10.7%	310	5.6
University or higher	50.2%	36.7%	13.1%	397	4.9
CURRENT VOTE INTENTION					
Conservative Party of Canada	75.5%	15.1%	9.4%	239	6.3
Liberal Party of Canada	42.7%	46.8%	10.4%	238	6.4
NDP	34.4%	55.0%	10.6%	117	9.1
Green Party	43.1%	46.2%	10.6%	82	10.8
Bloc Quebecois	33.0%	58.3%	8.8%	118	9.0
Undecided	42.4%	40.0%	17.7%	28	18.5

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 (+/-)
NATIONALLY	40.2%	47.5%	12.3%	1012	3.1
REGION					
British Columbia	43.4%	43.7%	12.9%	70	11.7
Alberta	51.8%	32.7%	15.4%	73	11.5
Saskatchewan/Manitoba	40.0%	39.7%	20.3%	61	12.6
Ontario	42.9%	47.1%	10.0%	400	4.9
Quebec	29.2%	58.1%	12.8%	344	5.3
Atlantic Canada	40.4%	49.0%	10.6%	64	12.3
GENDER					
Male	46.7%	46.1%	7.2%	476	4.5
Female	34.6%	48.8%	16.6%	536	4.2
AGE					
<25	31.5%	53.2%	15.4%	58	12.9
25-44	40.8%	48.6%	10.6%	339	5.3
45-64	39.4%	49.0%	11.6%	417	4.8
65+	46.6%	37.6%	15.8%	198	7.0
EDUCATION					
High school or less	36.6%	44.3%	19.2%	298	5.7
College or CEGEP	44.1%	43.6%	12.3%	338	5.3
University or higher	39.4%	53.4%	7.2%	376	5.1
CURRENT VOTE INTENTION					
Conservative Party of Canada	75.4%	16.9%	7.7%	297	5.7
Liberal Party of Canada	30.4%	61.1%	8.5%	220	6.6
NDP	17.3%	66.6%	16.2%	140	8.3
Green Party	19.5%	65.5%	15.0%	73	11.5
Bloc Quebecois	10.6%	81.1%	8.3%	108	9.4
Undecided	32.2%	52.4%	15.4%	36	16.3

Ideology					
<i>Q. Do you consider yourself a small 'c' conservative or a small 'l' liberal?</i>					
	Conservative (1-3)	Neither (4)	Liberal (5-7)	Sample Size	Margin of Error (+/-)
NATIONALLY	28%	40%	32%	1973	2.2
REGION					
British Columbia	27%	47%	26%	133	8.5
Alberta	43%	31%	26%	139	8.3
Saskatchewan/Manitoba	27%	41%	32%	117	9.1
Ontario	30%	35%	35%	761	3.6
Quebec	20%	47%	33%	675	3.8
Atlantic Canada	23%	44%	33%	148	8.1
GENDER					
Male	33%	35%	32%	945	3.2
Female	23%	45%	32%	1028	3.1
AGE					
<25	27%	37%	36%	128	8.7
25-44	25%	45%	30%	646	3.9
45-64	29%	37%	33%	785	3.5
65+	31%	39%	31%	414	4.8
EDUCATION					
High school or less	31%	47%	23%	552	4.2
College or CEGEP	31%	40%	29%	648	3.9
University or higher	23%	36%	41%	773	3.5
CURRENT VOTE INTENTION					
Conservative Party of Canada	60%	28%	11%	536	4.2
Liberal Party of Canada	11%	22%	67%	458	4.6
NDP	17%	45%	38%	257	6.1
Green Party	12%	54%	34%	155	7.9
Bloc Quebecois	19%	59%	21%	226	6.5
Undecided	21%	45%	33%	64	12.3

Trust in Government

Q. How much do you trust the government in Ottawa to do what is right?

	Almost always	Most of the time	Only some of the time	Almost never	Sample Size	Margin of Error (+/-)
NATIONALLY	5%	28%	44%	24%	1973	2.2
REGION						
British Columbia	1%	33%	50%	16%	133	8.5
Alberta	5%	37%	42%	15%	139	8.3
Saskatchewan/Manitoba	7%	24%	38%	31%	117	9.1
Ontario	5%	28%	44%	23%	761	3.6
Quebec	5%	24%	41%	30%	675	3.8
Atlantic Canada	1%	27%	48%	23%	148	8.1
GENDER						
Male	5%	32%	39%	24%	945	3.2
Female	4%	24%	48%	23%	1028	3.1
AGE						
<25	10%	39%	32%	19%	128	8.7
25-44	4%	25%	46%	25%	646	3.9
45-64	4%	25%	46%	25%	785	3.5
65+	4%	33%	42%	21%	414	4.8
EDUCATION						
High school or less	6%	27%	43%	24%	552	4.2
College or CEGEP	4%	32%	41%	22%	648	3.9
University or higher	4%	25%	47%	24%	773	3.5
CURRENT VOTE INTENTION						
Conservative Party of Canada	8%	50%	35%	6%	536	4.2
Liberal Party of Canada	5%	27%	43%	25%	458	4.6
NDP	1%	13%	55%	30%	257	6.1
Green Party	3%	15%	45%	37%	155	7.9
Bloc Quebecois	3%	12%	46%	40%	226	6.5
Undecided	2%	21%	37%	40%	64	12.3

Methodology:

EKOS' weekly tracking polls are conducted using Interactive Voice Recognition (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 both a landline and cell phone, as well as cell phone only households and landline only households. This dual frame yields a near perfect unweighted distribution on age group and gender, something almost never seen with traditional landline RDD sample or interviewer-administered surveys.

The field dates for this survey are November 17-23, 2010¹. In total, a random sample of 1,973 Canadians aged 18 and over responded to the survey (including a sub-sample of 1,696 decided voters). The margin of error associated with the total sample is +/-2.2 percentage points, 19 times out of 20.

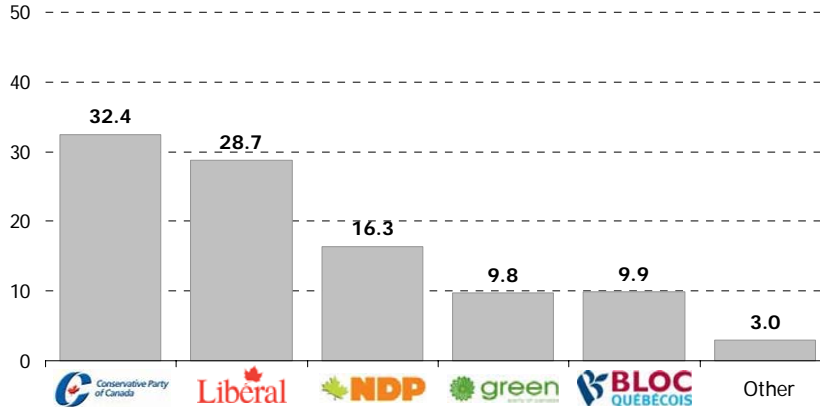
Please note that the margin of error increases when the results are sub-divided (i.e., error margins for sub-groups such as region, sex, age, education). All the data have been statistically weighted to ensure the samples composition reflects that of the actual population of Canada according to Census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

¹ Please note that these dates are not inclusive of weekends, as we do not survey on Saturday or Sunday.

Annex:

Federal vote intention: November 10-16

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



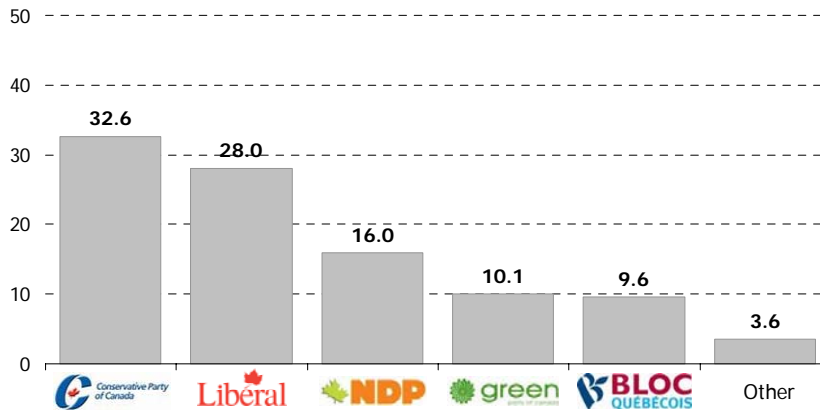
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 11.5% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; November 10-16, 2010 (n=1,500)

Federal vote intention: November 10-23

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 13.2% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; November 10-23, 2010 (n=3,196)