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CONSERVATIVE PARTY LOOKS SAFE DESPITE ROBOCALLS COURT CASE AND SUB-32 POINT POLLING

[Ottawa – December 17, 2012] – Consider the following paradox. Confidence in direction of the federal government and country are at near nadir levels (in recent history). Economic outlook, both short and more particularly long term optimism, is the lowest levels it has been in decades. Only about one in three Canadians think they will be better off five years from now and only half that think the next generation will be doing better than this 25 years from now.¹ On long term tracking of values, we see the country moving away from social (but not fiscal) conservatism and we see a more polarized ideological landscape where the center has largely evaporated. Of those increasingly picking ideological sides, it has been the small-l liberal camp which has been growing as the centre drifts more to the left in this new polarized environment.² Add to this serious short term troubles on challenging files such as the F-35 and a position on the Nexen takeover which is wildly offside all accounts of public opinion save those of the Prime Minister.³ Throw in a dash of a percolating vote suppression scandal that has the possibility of not only eclipsing Sponsorship, but perhaps Watergate and we might expect to find a recipe for imminent government disaster. Yet this is not the case.

HIGHLIGHTS

- **Federal vote intention:**
 - ☒ **31.9% Conservative Party**
 - ☒ **25.8% NDP**
 - ☒ **24.4% Liberal Party**
 - ☒ **8.4% Green Party**
 - ☒ **6.7% Bloc Québécois**
 - ☒ **2.8% Other**
- **Second choice:**
 - ☒ **22.2% Liberal Party**
 - ☒ **21.0% NDP**
 - ☒ **11.3% Conservative Party**
 - ☒ **11.1% Green Party**
 - ☒ **2.6% Bloc Québécois**
 - ☒ **2.0% Other**
 - ☒ **29.8% No second choice**
- **Direction of country:**
 - ☒ **50.8% right direction**
 - ☒ **38.1% wrong direction**
 - ☒ **11.0% DK/NR**
- **Direction of government:**
 - ☒ **44.1% right direction**
 - ☒ **46.3% wrong direction**
 - ☒ **9.6% DK/NR**

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

Despite these longer term tensions and short term travails, the Conservative Party is in a pretty good position. It may be hard to imagine how having the support of less than one in three voters and having fallen nearly eight points from the last election could be considered a “pretty good”

¹ See “*The End of Progress?*”, March 9, 2012.
Accessible online at: <http://goo.gl/IIATG>

² See “*Canada Evolving: Sources of Stability and Change in Canadian Social Fabric*”, December 1, 2012.
Accessible online at: <http://goo.gl/CTqwP>

³ See “*Almost Nobody Likes the Nexen Deal*”, December 7, 2012.
Accessible online at: <http://goo.gl/YnfwZ>

position yet we feel this is an accurate assessment for at least two reasons: First, the Conservatives have consistently shown that their vote is the most fiercely committed and most likely to turn out. Our current polls shows continued evidence of this formidable political advantage and it is also the case that voters in polls tend to understate their true support for incumbent “conservative” governments.

Secondly, consider the strengthened array of the centre-left options in Figure 1. While support for these choices is cumulatively up from 2011 election, particularly the Liberals (up 5.5 points at 24.4 per cent) and Greens (8.4 per cent, up from 3.9 in 2011), NDP support has diminished and the party now registers at about the same level as the rising Liberal Party at 25.8 per cent (down 4.8 points from 2011).

The Conservative Party may well benefit from a perfect progressive storm of vote splitting and futile (seat-wise) Green Party rise in votes resulting in scant or no seats as in 2008 when almost seven per cent failed to produce a single seat. The slightly invigorated Liberal Party and the slightly diminished NDP will now saw off about 50 per cent of voters and the lion’s share of the progressive vote. An even more popular Green Party is still far away from levels where this popularity equals seats under the first past the post system. So it may well be the case that a relatively stagnant and diminished Conservative Party is positioned to post another majority with even lower numbers than they had going into 2011.

The real changes are that the Liberal Party (perhaps in anticipation of Justin Trudeau’s ascendance to leadership) has pulled into a dead heat with the NDP. The Green Party is recovering to the levels they achieved in the lead up to the 2008 and the final centre-left party, the near dead Bloc Québécois, is now leading slightly (insignificantly though) in Quebec. All in all, there is little evidence that the forces considered in the opening paragraph are having much effect and if they are it is being channelled into a center left political logjam that shows no signs of relaxing Mr. Harper’s minority majority grip on parliament. Perhaps a consideration of voter mobility since 2011, or the second choices of voters will provide further insight into whether this paradoxical stranglehold is in any real jeopardy for the Prime Minister and his supporters.

So where are these modest shifts since the 2011 election coming from? Looking at Figure 4, we see that Conservative supporters have remained fiercely loyal, with the party retaining 78 per cent of its 2011 support. Liberal, NDP, and Green supporters, meanwhile, have shown a much greater degree of liquidity and promiscuity in their constituents. The churning among centre left parties suggests much more tepid connection to their current choices. This casting doesn’t augur particularly well for any of any of these opposition parties jumping into the lead as the clear home for frustrated centre left voters. For example, the Green Party has bled nearly half of its past supporters, but the influx in former Liberal and NDP supporters, as well as new voters, have more than made up for this loss.

Additionally, data on second choice (see Figure 5) reveals that Conservative supporters are largely entrenched in terms of their support. The plurality of these respondents is unwilling to even consider voting for another party. Turning to the other end of the political spectrum,

however, we see that the Liberal and NDP camps are much more open to supporting each other. Green Party supporters are open to voting either Liberal or NDP while Bloc voters are open to the idea of voting NDP.

Consequently, the parties on the centre left fare very well in terms of growth opportunities. If a ceiling is the addition of current and second choices of national parties the Conservatives would be at 43.2 points, the NDP at 46.8, the Liberals at a virtually identical 46.6, and the Green Party in a pretty seat rich 19.5 territory. Despite the allure of these figures, nothing in the current churning patterns suggests that we are going to see much different than two near equally matched Liberal and NDP parties producing a saw off and a slightly more muscular Green Party which would be further siphoning off the centre left vote in a pretty seat-inefficient manner. So the new political arithmetic suggests that the new minority-majority, which is increasingly offside with most Canadians, will continue to be majority government for some time.

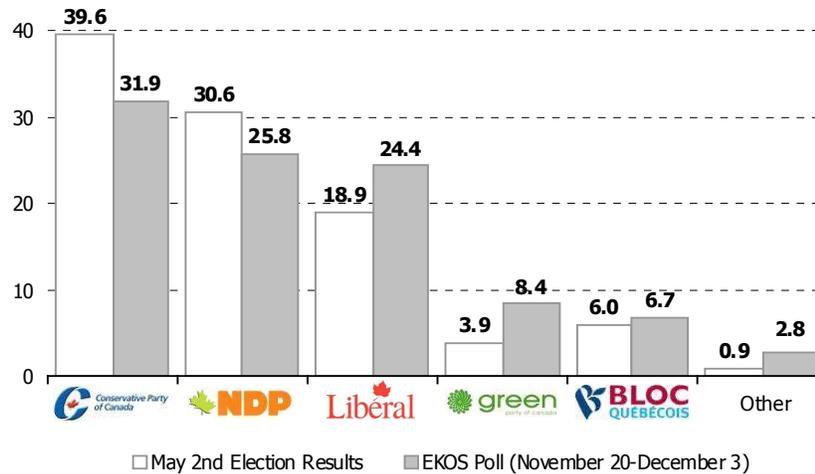
The political reality is that while the NDP and Liberals are both looking relatively strong compared to recent history, this probably precludes any real chances of even an informal deal before the next election. This leaves two wild cards. One is either the NDP or the Liberals creating some kind of deal with the Greens to vault them into a clear lead position. This is a pretty low rent option compared to the inertia underpinning in the deep institutional party histories standing in the path to a NDP-Liberal deal. Green supporters might be enticed to show up in greater numbers with a chance of more seats and a seat at the cabinet in a future government bolstered by them. The second wild card would be a meltdown in one of the current hot potatoes the government faces; F-35s perhaps, but this hasn't really captured the public imagination-indignation yet. The sleeper is the so called Robocalls Scandal which has flown under the public radar so far but has the potential to become very explosive. If the allegations are proven, this could well become Canada's Watergate. There is no evidence this has gripped the public at all yet.

One final threat which we will deal with in our next release is a profound darkening of both short term and long term economic outlook. No incumbent can survive the steady grind of worsening economic outlook indefinitely and if this mood worsens or perhaps even persists even the auspicious political arithmetic of the current political landscape may not be enough of a refuge. Putting aside all these ifs, the government appears to be in really good stead for continued political success.

Top Line Results:

Figure 1: Federal vote intention

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



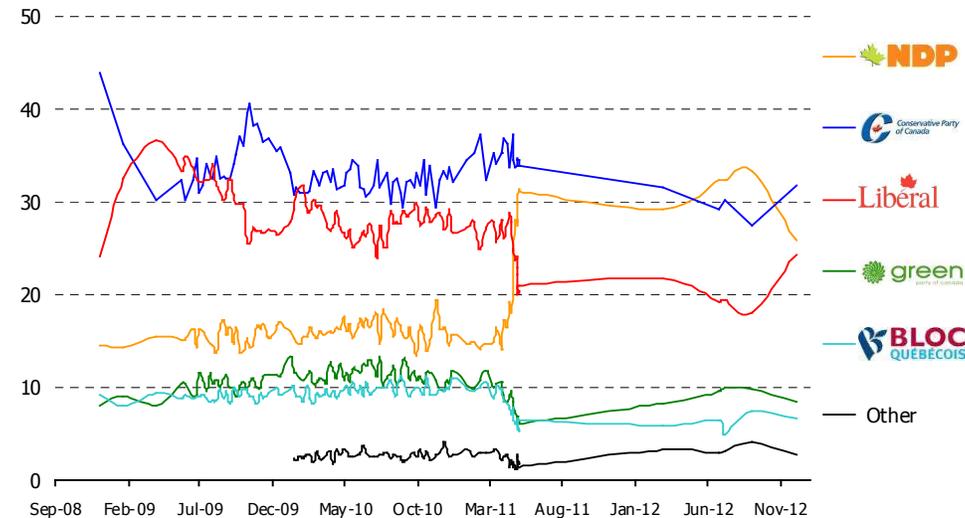
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 16.9% of Canadians are undecided/ineligible to vote.

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BASE: Canadians; November 20 – December 3, 2012 (n=5,433)

Figure 2: Tracking federal vote intention

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



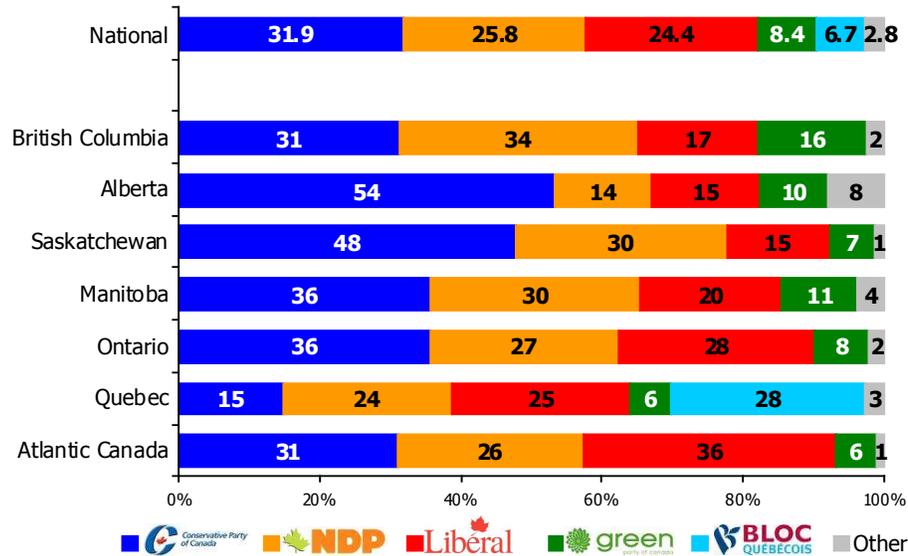
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 16.9% of Canadians are undecided/ineligible to vote.

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BASE: Canadians; most recent data point November 20 – December 3, 2012 (n=5,433)

Figure 3: Vote intention by region

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



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BASE: Canadians; November 20 – December 3, 2012 (n=5,433)

Figure 4: Current federal vote intention by 2011 vote

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

VOTE INTENTION	Overall	VOTE IN 2011				
		CPC	NDP	LPC	GP	BQ
	31.9	78.1	6.0	8.0	6.3	4.7
	25.8	6.3	66.4	16.3	16.1	12.5
	24.4	10.6	17.4	67.4	13.6	6.3
	8.4	2.4	5.1	5.2	55.2	3.8
	6.7	0.8	4.4	1.2	3.7	70.7
Other	2.8	1.7	0.6	2.0	5.1	2.0

Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 16.9% of Canadians are undecided/ineligible to vote.

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BASE: Canadians; November 20 – December 3, 2012 (n=5,433)



Figure 5: Second choice

Q. Which party would be your second choice?

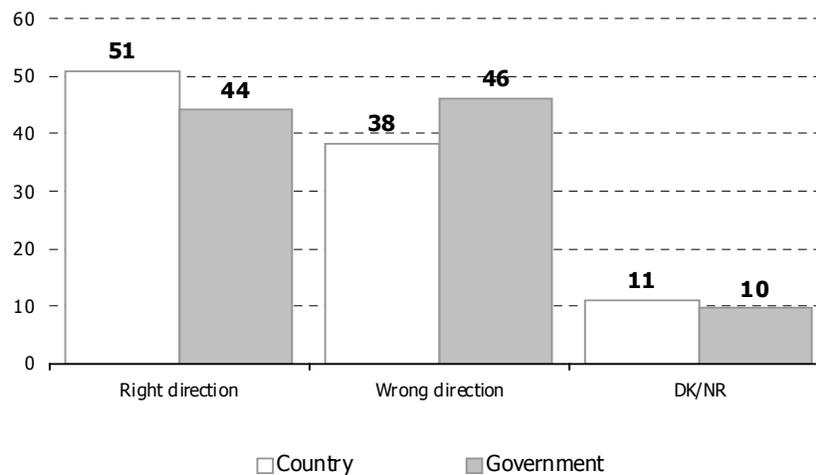
SECOND CHOICE	Second Choice (overall)	FIRST CHOICE					
		CPC	NDP	LPC	GP	BQ	Other
	11.3	--	13.7	23.4	11.4	9.4	19.8
	21.0	16.9	--	42.6	31.5	36.2	10.4
	22.2	29.2	37.1	--	25.5	9.9	11.9
	11.1	8.0	17.7	11.0	--	14.2	15.4
	2.6	0.7	6.1	2.1	3.1	--	1.8
Other	2.0	2.0	2.5	0.8	4.2	2.9	--
No second choice	29.8	43.2	22.9	20.1	24.2	27.4	40.7

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BASE: Decided voters; November 20 – December 3, 2012 (n=4,226)

Figure 6: Direction of country/government

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

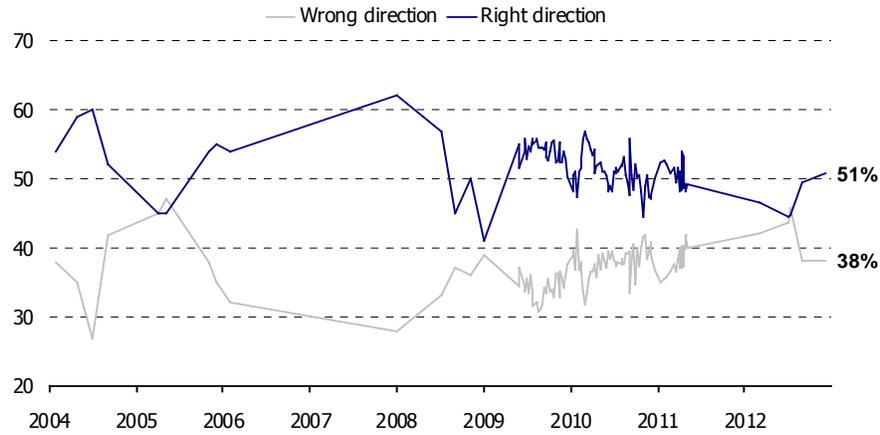


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BASE: Canadians (half-sample each); November 20 – December 3, 2012 (n=2,748/2,685)

Figure 7: Direction of country

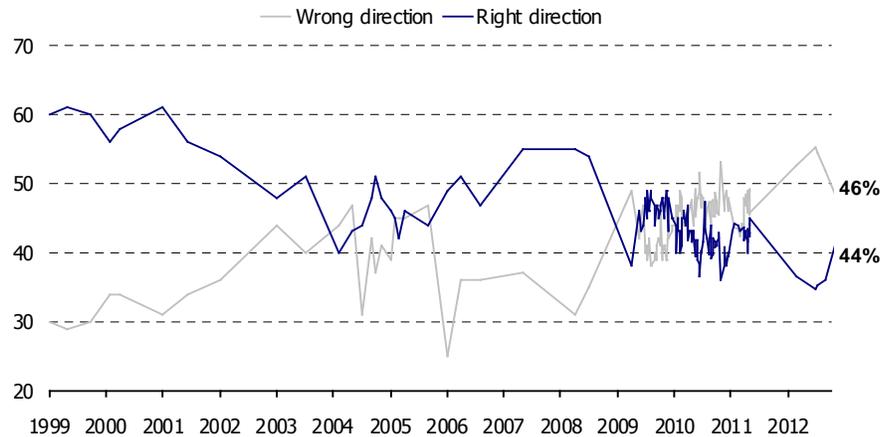
Q. All things considered, would you say the country is moving in the right direction or the wrong direction?



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Figure 8: 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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Detailed Tables:

National Federal Vote Intention (decided and leaning voters only)								
<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>								
						Other	Sample Size	Margin of Error (+/-)
NATIONALLY	31.9%	25.8%	24.4%	8.4%	6.7%	2.8%	4548	1.5
REGION								
British Columbia	31.3%	33.7%	17.1%	15.6%	0.0%	2.3%	500	4.4
Alberta	53.5%	13.7%	15.3%	9.7%	0.0%	7.8%	384	5.0
Saskatchewan	47.8%	29.8%	14.6%	6.6%	0.0%	1.1%	195	7.0
Manitoba	35.7%	29.8%	20.0%	10.8%	0.0%	3.7%	180	7.3
Ontario	35.8%	26.5%	28.0%	7.7%	0.0%	2.0%	1420	2.6
Quebec	14.7%	24.1%	25.4%	5.6%	27.7%	2.6%	1599	2.5
Atlantic Canada	30.9%	26.4%	35.9%	6.0%	0.0%	0.8%	260	6.1
GENDER								
Male	36.9%	23.1%	23.4%	8.1%	5.5%	3.1%	2213	2.1
Female	27.1%	28.4%	25.5%	8.8%	7.8%	2.4%	2308	2.0
AGE								
<25	27.5%	32.8%	16.2%	12.7%	5.4%	5.3%	207	6.8
25-44	28.9%	27.2%	22.0%	10.6%	8.8%	2.4%	1238	2.8
45-64	31.7%	25.0%	27.3%	6.8%	6.7%	2.5%	1836	2.3
65+	40.0%	20.8%	28.0%	5.4%	3.6%	2.2%	1237	2.8
EDUCATION								
High school or less	32.4%	23.5%	22.2%	9.6%	8.6%	3.7%	1434	2.6
College or CEGEP	33.9%	25.0%	22.5%	8.3%	6.7%	3.6%	1442	2.6
University or higher	29.9%	28.3%	28.0%	7.6%	5.0%	1.1%	1637	2.4
VOTE IN 2011 ELECTION								
Did not vote	28.3%	22.0%	25.1%	14.5%	6.5%	3.7%	640	3.9
Conservative Party	78.1%	6.3%	10.6%	2.4%	0.8%	1.7%	1261	2.8
NDP	6.0%	66.4%	17.4%	5.1%	4.4%	0.6%	1035	3.1
Liberal Party	8.0%	16.3%	67.4%	5.2%	1.2%	2.0%	776	3.5
Green Party	6.3%	16.1%	13.6%	55.2%	3.7%	5.1%	205	6.8
Bloc Québécois	4.7%	12.5%	6.3%	3.8%	70.7%	2.0%	324	5.4
Other	17.4%	25.9%	11.8%	5.3%	8.3%	31.3%	106	9.5



Second Choice

Q. Talking again in terms of a federal election, which party would be your second choice?

	 Liberal	 NDP	 Conservative Party of Canada	 green	 BLOC QUEBECOIS	Other	No 2 nd choice	Sample Size	Margin of Error (+/-)
NATIONALLY	22.2%	21.0%	11.3%	11.1%	2.6%	2.0%	29.8%	4226	1.5
REGION									
British Columbia	23.7%	20.1%	10.4%	15.2%	0.0%	2.5%	28.1%	500	4.4
Alberta	19.8%	14.9%	9.2%	9.6%	0.0%	2.9%	43.6%	384	5.0
Saskatchewan	29.4%	13.3%	6.2%	9.7%	0.0%	4.2%	37.2%	195	7.0
Manitoba	25.0%	17.2%	15.7%	8.3%	0.0%	2.3%	31.5%	180	7.3
Ontario	23.4%	22.5%	11.2%	12.2%	0.0%	2.0%	28.7%	1420	2.6
Quebec	16.8%	23.4%	13.0%	8.0%	13.0%	1.4%	24.4%	1277	2.7
Atlantic Canada	27.2%	22.5%	11.9%	9.5%	0.0%	0.3%	28.7%	260	6.1
GENDER									
Male	23.1%	20.9%	10.6%	11.6%	2.0%	2.4%	29.2%	2068	2.2
Female	21.5%	21.3%	12.1%	10.6%	3.2%	1.5%	29.8%	2133	2.1
AGE									
<25	25.4%	17.9%	9.1%	12.3%	3.7%	3.5%	28.1%	190	7.1
25-44	24.8%	21.5%	12.7%	10.0%	3.1%	2.3%	25.5%	1127	2.9
45-64	20.7%	22.3%	11.1%	13.0%	2.5%	1.6%	28.8%	1703	2.4
65+	19.3%	19.9%	10.8%	9.1%	1.5%	1.4%	38.1%	1176	2.9
EDUCATION									
High school or less	17.9%	18.6%	12.4%	9.7%	2.9%	2.4%	36.0%	1317	2.7
College or CEGEP	21.2%	20.3%	11.5%	11.4%	2.9%	2.1%	30.6%	1342	2.7
University or higher	26.6%	23.7%	10.4%	12.0%	2.2%	1.6%	23.3%	1533	2.5
CURRENT VOTE INTENTION									
Conservative Party of Canada	29.2%	16.9%	--	8.0%	0.7%	2.0%	43.2%	1337	2.7
Liberal Party of Canada	--	42.6%	23.4%	11.0%	2.1%	0.8%	20.1%	1086	3.0
NDP	37.1%	--	13.7%	17.7%	6.1%	2.5%	22.9%	1043	3.0
Green Party	25.5%	31.5%	11.4%	--	3.1%	4.2%	24.2%	308	5.6
Bloc Quebecois	9.9%	36.2%	9.4%	14.2%	--	2.9%	27.4%	343	5.3
Other	11.9%	10.4%	19.8%	15.4%	1.8%	--	40.7%	109	9.4



Direction of Country

Q. First, 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	50.8%	38.1%	11.0%	2748	1.9
REGION					
British Columbia	46.4%	43.9%	9.7%	278	5.9
Alberta	62.5%	27.1%	10.4%	241	6.3
Saskatchewan	53.4%	23.6%	23.0%	139	8.3
Manitoba	47.0%	32.3%	20.7%	109	9.4
Ontario	54.7%	36.6%	8.7%	850	3.4
Quebec	40.0%	47.3%	12.7%	960	3.2
Atlantic Canada	58.9%	32.6%	8.5%	163	7.7
GENDER					
Male	53.7%	38.2%	8.0%	1254	2.8
Female	50.6%	39.8%	9.6%	1406	2.6
AGE					
<25	49.5%	40.3%	10.1%	125	8.8
25-44	48.0%	45.0%	6.9%	714	3.7
45-64	55.3%	37.0%	7.7%	1104	3.0
65+	53.6%	32.4%	14.0%	712	3.7
EDUCATION					
High school or less	53.0%	36.6%	10.5%	876	3.3
College or CEGEP	52.2%	39.0%	8.8%	856	3.4
University or higher	51.4%	41.8%	6.9%	915	3.2
CURRENT VOTE INTENTION					
Conservative Party	84.4%	11.1%	4.5%	697	3.7
NDP	37.1%	56.9%	5.9%	551	4.2
Liberal Party	46.2%	44.8%	9.0%	582	4.1
Green Party	36.5%	55.5%	8.0%	174	7.4
Bloc Quebecois	35.6%	52.9%	11.6%	228	6.5
Other	25.6%	67.2%	7.2%	56	13.1

Direction of Government

Q. First, 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	44.1%	46.3%	9.6%	2685	1.9
REGION					
British Columbia	41.0%	50.1%	8.9%	292	5.7
Alberta	56.6%	29.8%	13.6%	228	6.5
Saskatchewan	51.0%	33.5%	15.5%	115	9.1
Manitoba	53.0%	35.3%	11.7%	113	9.2
Ontario	49.3%	44.7%	6.0%	844	3.4
Quebec	29.9%	57.8%	12.4%	923	3.2
Atlantic Canada	43.3%	45.4%	11.3%	165	7.6
GENDER					
Male	51.0%	43.3%	5.7%	1276	2.7
Female	39.3%	50.9%	9.9%	1337	2.7
AGE					
<25	42.2%	48.0%	9.9%	135	8.4
25-44	45.2%	48.9%	5.9%	725	3.6
45-64	44.2%	48.0%	7.7%	1062	3.0
65+	48.3%	41.1%	10.5%	690	3.7
EDUCATION					
High school or less	47.8%	43.1%	9.1%	847	3.4
College or CEGEP	47.6%	45.8%	6.6%	839	3.4
University or higher	40.6%	51.9%	7.5%	922	3.2
CURRENT VOTE INTENTION					
Conservative Party	86.1%	10.5%	3.5%	687	3.7
NDP	23.2%	71.5%	5.2%	577	4.1
Liberal Party	34.1%	58.1%	7.8%	587	4.0
Green Party	35.1%	58.5%	6.4%	151	8.0
Bloc Quebecois	20.3%	74.3%	5.4%	203	6.9
Other	21.6%	64.1%	14.3%	55	13.2



Methodology:

This survey 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 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. 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.⁴

The field dates for this survey are November 20 – December 3, 2012. In total, a random sample of 5,433 Canadians aged 18 and over responded to the survey (including a sub-sample of 4,548 decided and leaning voters). The margin of error associated with the total sample is +/- 1.3 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.

⁴ For further reading, please see "AAPOR Report on Online Panels" by the American Association for Public Opinion Research, accessible online at: <http://qoo.g/1xXhr>