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SHIFTING POLITICAL PROSPECTS FOR STEPHEN HARPER:

SHOULD HE STAY OR SHOULD HE GO?

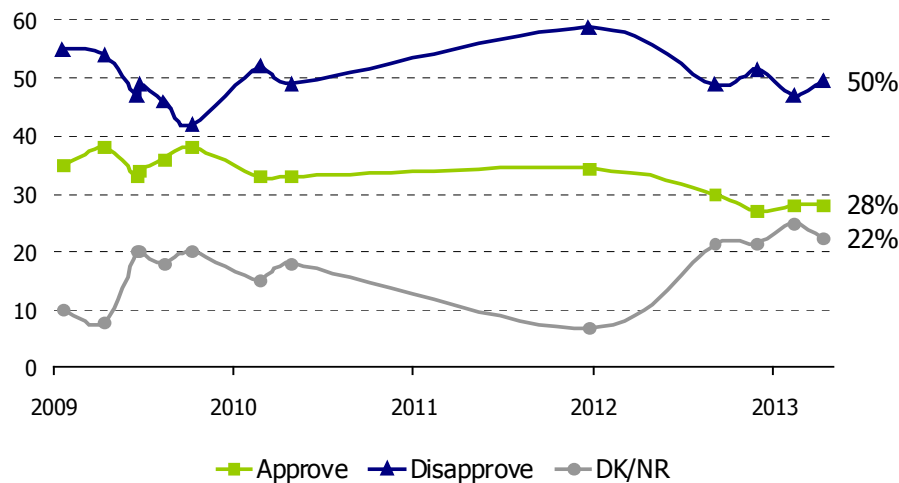
[Ottawa – April 12, 2013] Despite the fact that there is no imminent election, speculation about the viability of Stephen Harper’s leadership of the Conservative Party is rising.¹ As we near the midterm we will consider what light the trends in public opinion might shine on this question. So in the absence of anyone having asked us the question, and undoubtedly studied indifference to our conclusions on the part the subject of this analysis, we will proceed.

The first part of our analysis will have nothing to do with the fortunes of his two main political competitors, the NDP and the (soon to be) Justin Trudeau-led Liberal Party. Obviously, these factors will affect the prospects for Harper but we will argue that the more important challenges do not emanate from these sources. Nor do ongoing issues of the day, travails with the apparent profligacy/lifestyles of some of his senate choices, or even the as-yet-to-be-determined impacts of questions of election improprieties.

Some of these factors are undoubtedly reflected in Mr. Harper’s inauspicious approval numbers:

Approval rating – Stephen Harper

Q. Do you approve or disapprove of the way Stephen Harper, Prime Minister of Canada and leader of the Conservative Party of Canada, is handling his job?



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BASE: Canadians; most recent data point April 3-10, 2013 (n=4,568)

¹ Martin, Lawrence, "Stay or go? Harper's party has to know", The Globe and Mail, April 9, 2013. Available online at: <http://goo.gl/BKbxZ>

For some time, the country has been divided about Mr Harper. Conservative supporters love Mr. Harper; everyone else, not so much. He has not only endured but flourished politically despite the fact that those who disapprove of him have outnumbered his supporters 2-to-1 for some time. It is, however, noteworthy that 28 per cent is his lowest ever approval rating.

This scarcity of love for the Prime Minister is not unusual. The nadir of 28 points and the trend line which sees it steadily falling from around 40 points in 2010 is a challenge, but not a fatal one. His approval is running around the same level as his party and these figures need to be moved upward to ensure success. Many students of federal politics, however, have failed to realise that majority disapproval is not a problem in Harper's model for success. Positive approval (from supporters who are very loyal and committed to their leader) is much more crucial. It is now nosing down into critical areas, but he has shown considerable resilience in the face of these challenges in the past.

The more important challenge for Harper is the state of public outlook on the economy and its ensuing impact on confidence that the country and federal government is moving in the right direction. Herein lies the real challenge; the one which uncorrected will most likely be fatal for his future prospects. Mr. Harper has enjoyed an advantage over his competitors on managing the economy. In fact, his constituency is a blend of those who are attracted to the values he is associated with, and those who feel that their economic self-interests are best served with him as Prime Minister.

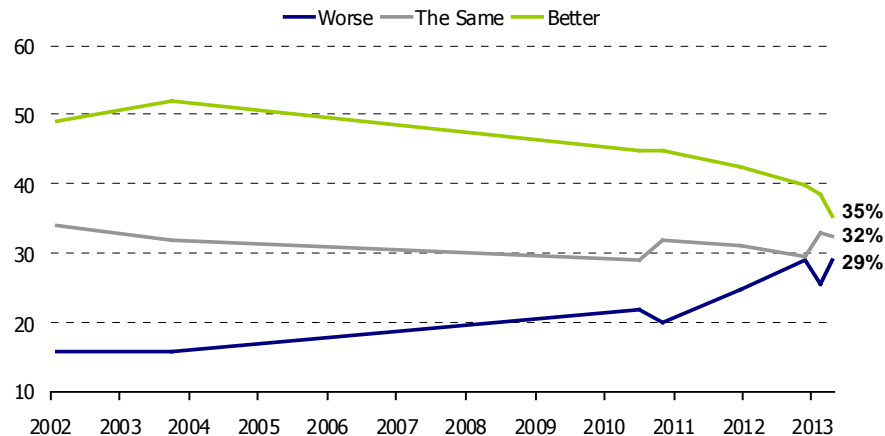
Numerous indicators show that concerns with the economy are the dominant concerns of Canadians and that long term anxieties about our economic future are mounting. The notion that we were the stalwart economic performer in the G8 has been displaced as our growth and growth forecasts have cooled substantially. There is a broad sense that the middle class (Mr. Harper's prime political constituency) is in deep trouble. While they may be comforted that at least we aren't Greece or Spain, the long grind of growing fears of economic stagnation, or worse erosion, weigh heavily on an incumbent after a certain amount of time. Only 14% of Canadians think the next generation will be better off² and even when we focus on the nearer five-year horizon, the pattern is to one of deepening despair for a better future.

Consider the chart below:

² See EKOS Research Associates Inc. "The End of Progress?", March 9, 2012. Available online at: <http://goo.gl/IATG>

Long-term personal financial outlook

Q. Thinking ahead over the next five years or so, do you think your personal financial situation will be better or worse than it is today?



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BASE: Canadians (half-sample); most recent data point April 3-10, 2013 (n=2,271)

Whereas optimism outstripped pessimism by a healthy twenty point advantage when Mr. Harper took office, there has been a steady pattern of decline such that only about one in three now feel they will be better off in five years and the pessimists now are only a few points less frequent than optimists. Granted, Mr. Harper's base continues to be more firmly in the optimistic camp but as that segment shrinks, so does his support. And for someone who has staked his mandate on Canada's economic performance, this slow, downward grind is far more damaging than any of the issues du jour which find more expression in the media.

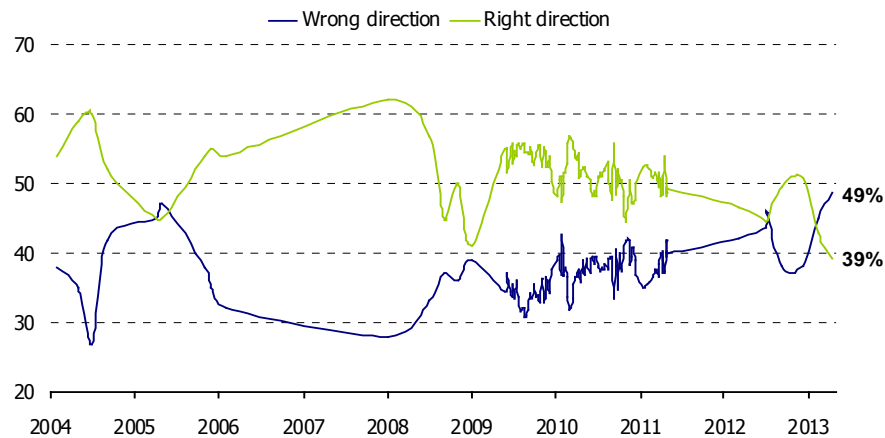
There is another new aspect to the public outlook on the economy which bears attention here. Concerns with inequality, particularly the gap between the very rich and everyone else, has become a pinnacle concern. This is also linked to a sense that getting ourselves out of this long term pattern of stagnation and decline may require rethinking the incentive systems that underpin liberal capitalism. It is ironic that just as Mr. Harper offers encomiums on the passing of Margaret Thatcher, there appears to be a growing consensus that Thatcherism, Reaganomics, trickle-down economics, and the varieties of monetarism which have been vigorously implemented since she first took office didn't work. The bumper sticker simplicity of lower taxes/less government equals prosperity for all has been laid bare as a cruel hoax. There is a sense that forward movement will require blending fairness and growth in ways that are very different from the night watchman state that seemed to underpin both Thatcher and Harper's views of the role of the state.

This sense that maybe the plan for extricating ourselves from this not so gentle slide into stagnation and a worse economic future is also reflected in the worst ever scores we have seen

on the direction of the country. We have moved from a two-to-one advantage for right national direction to a first ever sub-forty score and now half the country believes that we are moving in 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?



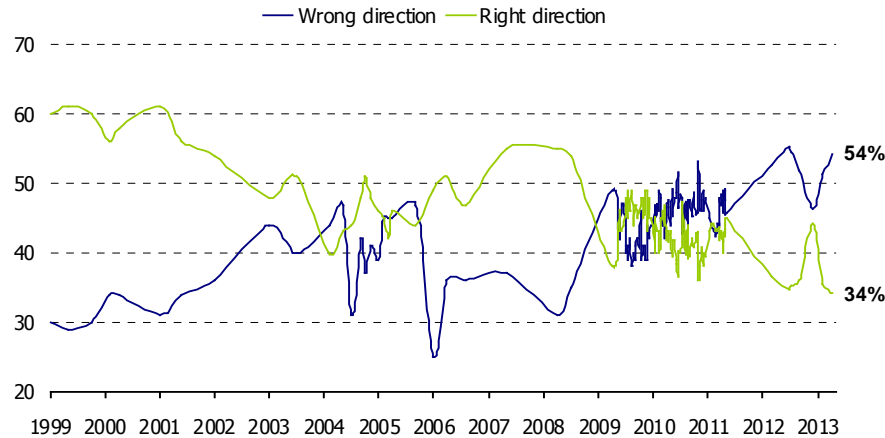
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BASE: Canadians (half-sample); most recent data point April 3-10, 2013 (n=2,270)

The numbers are even grimmer for Mr. Harper on direction of federal government. At the close of the nineties, the federal government had a two-to-one advantage on right versus wrong direction. Today, this ratio is 34-to-55, which is almost a complete inversion. Harper is certainly not responsible for the stagnation of the Canadian and Western economy. He was also not responsible for the relative fiscal health and comparatively positive outlook of the Canadian economy coming out of 2008 meltdown. As it becomes clearer that the post-2008 world is not featuring the normal cyclical swings back to economic growth and that we now are in what Tyler Cowan has called the age of stagnation, Mr. Harper's assumed mantle of steward of economic health may becoming increasingly uncomfortable.

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); most recent data point April 3-10, 2013 (n=2,298)

So, does all of this mean that Stephen Harper should consider a walk in a mid-April snow and step aside? The evidence, while daunting, does not lead clearly to that conclusion. Although the Liberals now have a (statistically insignificant) lead, and notwithstanding the profound challenge of a stagnant economy, Mr. Harper still enjoys some considerable strengths. First of all, the Conservatives hold a strong lead among most likely voters. They have the most committed voters and the strongest get-out-the-vote and ground game. The Liberals and NDP are still fairly equally matched and the resurgent Green Party also favours the unified Conservatives. Mr. Harper has shown resilience before and he still enjoys these hidden advantages. It is also the case that the public have yet to hear a plausible plan from either the Liberals or the NDP as to how to reverse the sense of economic doom.

Yet if this pattern of growing belief in a darkening economic future is not reversed, Harper may find himself hard pressed to secure a fourth mandate nearly ten years after he first took office.

Detailed Tables:

Approval Rating – Stephen Harper						
<i>Q. Do you approve or disapprove of the way Stephen Harper, Prime Minister and leader of Conservative Party of Canada is handling his job?</i>						
	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	28.1%	49.6%	19.2%	3.1%	4568	1.5
REGION						
British Columbia	27.6%	52.7%	17.7%	2.0%	917	3.2
Alberta	37.8%	34.3%	19.7%	8.2%	724	3.6
Saskatchewan	31.5%	42.3%	13.9%	12.4%	285	5.8
Manitoba	30.3%	43.8%	19.1%	6.9%	217	6.7
Ontario	33.4%	48.0%	17.9%	0.7%	1084	3.0
Quebec	15.9%	57.4%	23.0%	3.7%	1124	2.9
Atlantic Canada	23.1%	57.7%	17.7%	1.5%	207	6.8
GENDER						
Male	34.7%	50.5%	13.8%	1.1%	2158	2.1
Female	22.9%	50.5%	25.0%	1.5%	2275	2.1
AGE						
<25	31.3%	48.5%	18.6%	1.7%	211	6.8
25-44	27.4%	50.7%	20.2%	1.7%	1036	3.0
45-64	27.5%	53.1%	18.4%	1.0%	1881	2.3
65+	31.5%	46.3%	21.1%	1.1%	1295	2.7
EDUCATION						
High school or less	29.5%	45.2%	23.6%	1.7%	1437	2.6
College or CEGEP	32.3%	46.4%	20.2%	1.2%	1382	2.6
University or higher	25.0%	58.5%	15.2%	1.3%	1610	2.4
COUNTRY OF BIRTH						
Canada	27.8%	52.4%	18.4%	1.5%	3722	1.6
Other	32.6%	41.6%	25.0%	0.9%	747	3.6
CURRENT VOTE INTENTION						
Conservative Party	12.7%	68.1%	18.5%	0.7%	1063	3.0
NDP	76.4%	9.2%	13.7%	0.7%	1142	2.9
Liberal Party	11.8%	74.4%	13.7%	0.1%	835	3.4
Green Party	15.7%	68.0%	15.0%	1.3%	298	5.7
Bloc Quebecois	9.3%	72.3%	17.2%	1.2%	238	6.4
Other	18.6%	60.4%	19.7%	1.3%	119	9.0



Long-Term Economic Outlook

Q. Thinking ahead over the next year or so, do you think your personal financial situation will be better or worse than it is today?

	Worse (1-3)	About the Same (4)	Better (5-7)	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	29.0%	32.4%	35.3%	3.3%	2271	2.1
REGION						
British Columbia	28.0%	28.0%	41.4%	2.6%	460	4.6
Alberta	20.1%	31.9%	39.9%	8.1%	351	5.2
Saskatchewan	20.2%	25.9%	40.8%	13.2%	154	7.9
Manitoba	27.4%	34.6%	32.7%	5.4%	119	9.0
Ontario	30.4%	30.4%	37.6%	1.6%	524	4.3
Quebec	29.9%	38.6%	29.3%	2.2%	565	4.1
Atlantic Canada	42.6%	34.1%	20.3%	3.0%	93	10.2
GENDER						
Male	30.6%	28.1%	39.6%	1.8%	1078	3.0
Female	28.2%	38.3%	32.1%	1.4%	1131	2.9
AGE						
<25	29.2%	16.3%	50.6%	3.9%	111	9.3
25-44	23.4%	26.0%	49.7%	0.9%	502	4.4
45-64	35.5%	33.8%	29.3%	1.3%	950	3.2
65+	27.9%	56.2%	15.1%	0.9%	643	3.9
EDUCATION						
High school or less	30.0%	37.2%	30.7%	2.1%	725	3.6
College or CEGEP	30.5%	33.2%	35.4%	0.9%	689	3.7
University or higher	27.8%	29.3%	41.2%	1.7%	794	3.5
COUNTRY OF BIRTH						
Canada	28.2%	34.3%	35.7%	1.8%	1865	2.3
Other	35.3%	27.1%	36.4%	1.2%	359	5.2
CURRENT VOTE INTENTION						
Conservative Party	34.0%	32.9%	31.0%	2.1%	512	4.3
NDP	19.5%	36.2%	43.6%	0.7%	591	4.0
Liberal Party	31.1%	34.5%	33.1%	1.3%	406	4.9
Green Party	31.5%	19.5%	48.0%	1.1%	141	8.3
Bloc Quebecois	25.9%	39.5%	32.9%	1.7%	127	8.7
Other	46.0%	21.2%	32.8%	0.0%	60	12.7



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	39.4%	48.6%	12.0%	2270	2.1
REGION					
British Columbia	40.8%	48.5%	10.8%	453	4.6
Alberta	47.3%	39.2%	13.5%	352	5.2
Saskatchewan	38.7%	44.4%	16.9%	137	8.4
Manitoba	43.8%	41.5%	14.7%	96	10.0
Ontario	38.3%	50.6%	11.1%	557	4.2
Quebec	36.6%	50.5%	12.9%	565	4.1
Atlantic Canada	36.7%	52.2%	11.0%	103	9.7
GENDER					
Male	41.5%	49.4%	9.1%	1085	3.0
Female	38.5%	49.4%	12.1%	1118	2.9
AGE					
<25	49.4%	45.2%	5.4%	105	9.6
25-44	37.7%	53.2%	9.1%	523	4.3
45-64	38.6%	51.1%	10.3%	956	3.2
65+	41.8%	41.4%	16.8%	623	3.9
EDUCATION					
High school or less	43.6%	47.4%	9.0%	721	3.7
College or CEGEP	39.0%	48.5%	12.5%	685	3.7
University or higher	37.7%	52.0%	10.4%	802	3.5
COUNTRY OF BIRTH					
Canada	37.5%	52.1%	10.5%	1874	2.3
Other	51.6%	36.4%	12.1%	352	5.2
CURRENT VOTE INTENTION					
Liberal Party	33.5%	56.0%	10.5%	500	4.4
Conservative Party	65.5%	27.2%	7.3%	588	4.0
NDP	28.7%	60.1%	11.2%	418	4.8
Green Party	23.4%	65.7%	10.9%	152	8.0
Bloc Quebecois	30.9%	61.0%	8.1%	136	8.4
Other	16.6%	81.8%	1.5%	58	12.9

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	34.2%	54.1%	11.8%	2298	2.0
REGION					
British Columbia	31.5%	55.3%	13.3%	464	4.6
Alberta	34.6%	47.8%	17.6%	372	5.1
Saskatchewan	35.0%	42.3%	22.7%	148	8.1
Manitoba	38.4%	48.9%	12.8%	121	8.9
Ontario	39.0%	51.9%	9.1%	527	4.3
Quebec	28.1%	59.1%	12.8%	559	4.1
Atlantic Canada	29.8%	66.1%	4.2%	104	9.6
GENDER					
Male	38.9%	52.1%	9.0%	1073	3.0
Female	31.4%	57.6%	11.0%	1157	2.9
AGE					
<25	46.7%	43.0%	10.2%	106	9.5
25-44	32.5%	59.3%	8.3%	513	4.3
45-64	31.3%	59.5%	9.2%	925	3.2
65+	39.9%	46.3%	13.8%	672	3.8
EDUCATION					
High school or less	37.4%	51.3%	11.4%	716	3.7
College or CEGEP	35.9%	55.0%	9.2%	697	3.7
University or higher	32.8%	57.7%	9.5%	808	3.5
COUNTRY OF BIRTH					
Canada	31.9%	58.1%	10.1%	1848	2.3
Other	48.2%	42.0%	9.8%	395	4.9
CURRENT VOTE INTENTION					
Conservative Party	27.9%	66.2%	5.9%	563	4.1
NDP	69.9%	22.5%	7.7%	554	4.2
Liberal Party	19.1%	71.9%	9.0%	417	4.8
Green Party	25.1%	61.6%	13.3%	146	8.1
Bloc Quebecois	21.5%	70.8%	7.6%	102	9.7
Other	18.7%	69.4%	11.9%	61	12.6

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 April 3-10, 2013. In total, a random sample of 4,568 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/-1.5 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 sample's composition reflects that of the actual population of Canada according to Census data.