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THE TRUDEAU EFFECT

WHAT DOES THE EVIDENCE SAY SO FAR?

[Ottawa – April 14, 2013] A plethora of pundits have offered views on the emergence of Justin Trudeau as the next leader of the Liberal Party. Here we will take a more modest approach and focus on what the public opinion trends are telling us. It is probably safe to say that Mr. Trudeau is causing a buzz in media coverage. The mixture includes the gamut from committed sceptics/critics to fawning acolytes, but it is safe to say that media attention to Mr. Trudeau has risen and that arguably the overall tone has tilted positive. This seems to more or less reflect what is going on in public opinion.

We argued in a companion piece that the most profound challenges facing Mr. Harper were not the immediate threat posed by a remarkably rejuvenated Liberal Party led by Mr. Trudeau. Rather, he was being weighed down by a long downward grind in public outlook on the very file he has claimed as his own – the economy.

Federal vote intention

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

National Results



National Results – “Likely voter” model



2011 Election Results



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 11.0% of respondents are undecided and 2.3% are ineligible to vote.

*Our “likely voters” involves dropping those respondents who did not vote in the 2011 Federal Election and then weighting the remaining cases by how they voted.

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

We can and should look separately at the issue of how the alternative to Mr. Harper might affect the long term prospects for continued success of him and his party. While the answers here are less clear than in the case of the corrosive impacts of a darkening economic mood on his prospects, it does appear that Mr. Harper has further cause for worry. It also appears that his

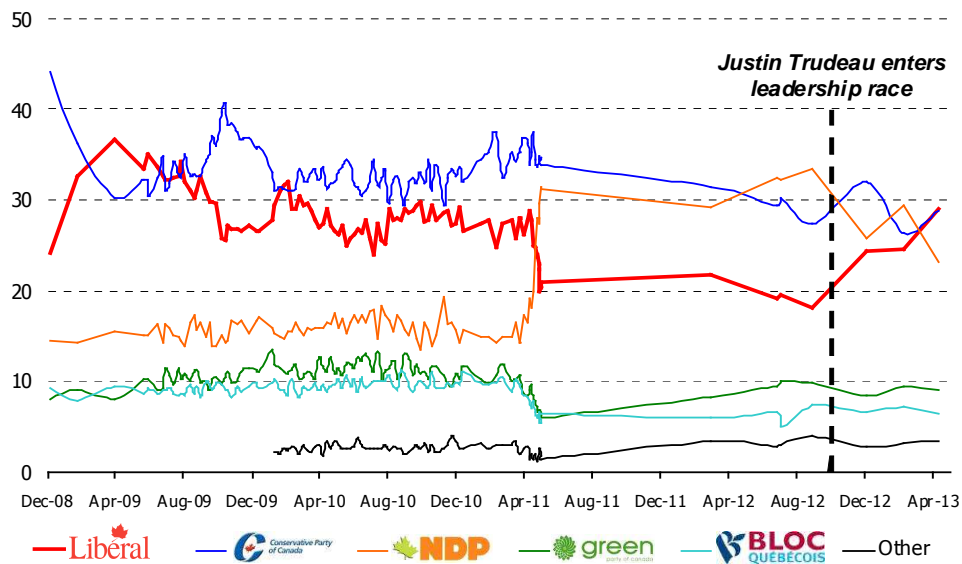
worries can (at least temporarily) shift from a sagging NDP party to a more muscular Liberal Party which has now moved into a tie or even a slight lead.

The overall national results show the Liberal Party is now in a statistically insignificant lead. Whereas the lead is statistically meaningless, it is no doubt extremely heartening to long standing supporters of Canada's erstwhile natural governing party who have failed to see any sort of lead (in our polling) since January of 2010. Without putting too much of a damper on any triumphal celebrations, we note that our adjustment for most likely voters puts Mr. Harper back into clear minority territory. We also note that the likely voter model may well be flawed two years away from what might be a very different election dynamic and may unduly punish the Liberal Party by ignoring the dispirited Liberals who stayed home in 2011 (the model involves dropping those respondents who did not vote in 2011, among other adjustments). Nevertheless, it is also worth noting that it was the prorogation-swollen Liberal support under Michael Ignatieff that last recorded a lead, and we all know how that turned out.

Yet there is something undeniably going on when we look at the trend lines in the chart below:

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.

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

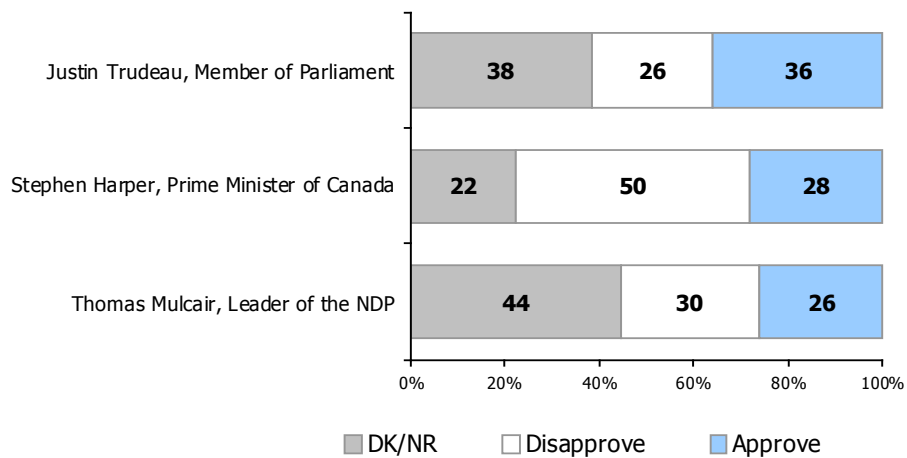
We see that the Liberals remained in a deep historical swoon until late last summer. At that point, they begin to rise dramatically and both the NDP and the Conservative Party start to fall. While not direct causal evidence, it is pretty hard to imagine any other source for this cotemporaneous rise than the appearance of Justin Trudeau on the national scene. Moreover, while there were some discrepancies in the constituency analysis of the Liberal Party and Mr. Trudeau's numbers at the outset of this period, these have all essentially disappeared. For all

intents and purposes, the Liberal Party is now seen as the party led by Justin Trudeau and this factor has taken them from distant third place afterthoughts to (at least) tied frontrunners. Others can question whether this reveals the shallow fickleness of the electorate or the charisma of Justin Trudeau. The profound impacts on the Liberal Party position and the overall political landscape are, however, undeniable.

Some may think that this is a bubble produced by the culmination of the leadership race and the closing 'conventionette'. The steady straight line progression of both Liberal support and Mr. Trudeau's awareness and approval numbers suggest that this is less of a bubble and more of a march.

Job approval ratings

Q. Do you approve or disapprove of the way ... is handling his job?



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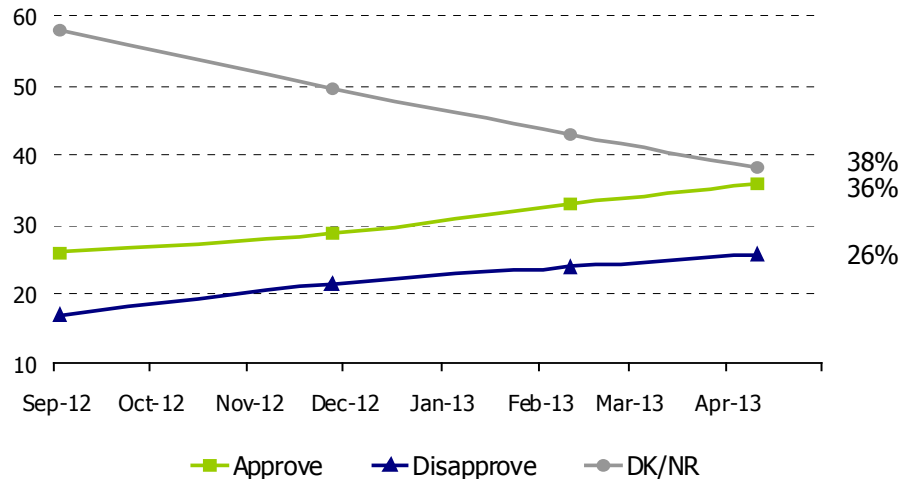
BASE: Canadians; April 3-10, 2013 (n=4,568)

The comparative approval ratings above show Mr. Trudeau with a clear but not mammoth approval advantage over his two rivals. At 36 points, Mr. Trudeau has a ten-point net lean to positive over negative, which is much better than the near two-to-one negatives for the Prime Minister and the slight lean to negative for Thomas Mulcair, who is the least well known of the three leaders, despite the advantage of being leader of Her Majesty's Loyal Opposition. Still, a 36-point approval rating suggests that neo-Trudeaumania has yet to grip the country.

The time series since he entered the race is perhaps the most impressive evidence that Mr. Trudeau is doing well with the electorate.

Approval rating – Justin Trudeau

Q. Do you approve or disapprove of the way Justin Trudeau, Member of Parliament and candidate for leadership of the Liberal Party of Canada, is handling his job?



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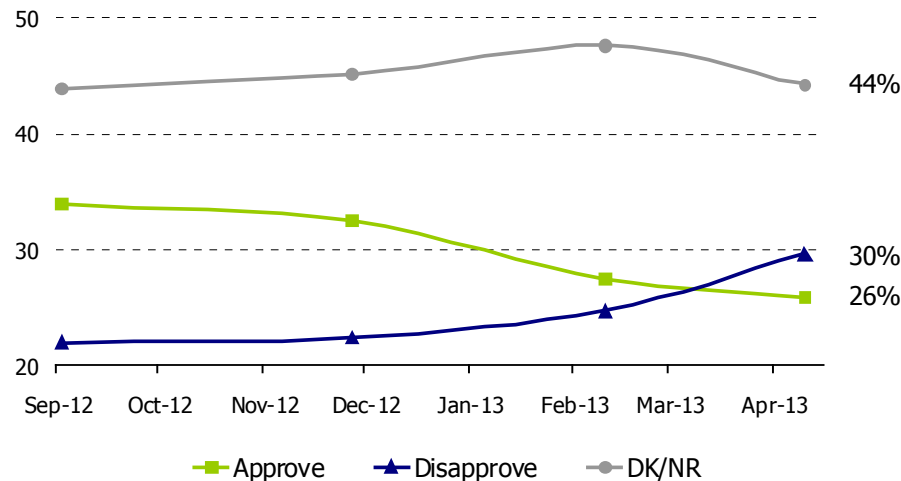
BASE: Canadians; most recent data point April 3-10, 2013 (n=4,568)

The trend lines here are dramatic and clear. Since he entered the race, Mr. Trudeau has gone from 60 per cent who either did not recognize his name or had no opinion on him to 38 per cent. Another way of looking at this is that more than 5 million voters have a view on him who didn't at the outset of the race.

Meanwhile, familiarity with Thomas Mulcair has not budged. This should be of deep concern to the NDP who have also seen Mr. Mulcair's approval fall from 34 per cent to 26 since September, while his party endured a similar fall from grace. The net effect of this has been to tilt the political landscape in a manner which has moved the NDP from the clear alternative to the Conservatives to the third place party. If this trend line isn't reversed for the NDP presently, they risk relinquishing their role as Official Opposition, not to mention their chance at forming government. These trends are, however, still quite reversible.

Approval rating – Thomas Mulcair

Q. Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?



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One final note of interest is the demographic and regional constituencies that seem to have emerged as Mr. Trudeau has moved into the public's mind as leader of the Liberal Party. The constituencies are remarkably similar for the party and Mr. Trudeau, which reinforces the theory that his presence is largely the source of their rising fortunes.

Mr. Trudeau and the Liberals are doing very well in Atlantic Canada and they lead in Quebec (resurrecting the Quebec constituency which propelled Chretien to three successive majorities). The Conservatives are still strong in Ontario, but they are tied with the Liberals, while the NDP third. Looking west, the Liberal prospects cool, although they are competitive in British Columbia and Manitoba. Mr. Trudeau actually does considerably better in Manitoba than the Liberal Party itself.

The Liberals are mildly stronger with women, but the more surprising finding is age. The broad impression is that the relatively youthful Justin Trudeau will do much better with younger Canada. So far, however, he is doing better with older Canada where he has pulled the Liberals into a tie with the Conservatives who held a huge advantage with seniors in the last election. While this may be somewhat iconoclastic to receive images, it isn't a bad thing politically as older voters actually vote and younger voters do not. Younger voters probably have not been riveted to the protracted leadership contest and there is some evidence that he can do well there. No party stands out with younger or Gen-X voters. Mr. Trudeau's personal approval numbers are better here than the parties, which suggest he may well enjoy more strength there as these voters tune in more. The continued strength of the rising Green Party with younger voters






suggests that some sort of deal with the Green Party might be a route to accelerating overall support and redressing the party's current shortfall with younger voters.

The picture with the immigrant vote is quite interesting. In considering recent claims that the immigrant vote is swinging Conservative and that this is one of the ingredients of a "big shift" to long-term Conservative rule, we now see that the Liberals lead with both visible minorities and non-Canadian born (different test for that group). This shift has occurred since that last election, as has the (at least temporary) renaissance of the Trudeau-led Liberal Party.

The next challenge for a Liberal Party led by Justin Trudeau will be to convert this obvious momentum into electoral success. Questions will mount about what the policy vision will be and he will undoubtedly endure attacks from both the right and the left. Whether he withers or thrives under these challenges is uncertain, but it is clear that he has produced an (at least temporary) profound shift in his party's fortunes. This casts open the question of what the political future holds.



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>								
	 Liberal	 Conservative Party of Canada	 NDP	 green	 BLOC QUEBÉCOIS	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	29.1%	28.8%	23.3%	9.0%	6.4%	3.4%	3695	1.6
REGION								
British Columbia	23.1%	28.0%	31.1%	14.2%	0.0%	3.6%	777	3.5
Alberta	19.5%	48.9%	14.9%	8.3%	0.0%	8.4%	568	4.1
Saskatchewan	20.4%	40.9%	28.6%	6.4%	0.0%	3.6%	219	6.6
Manitoba	26.5%	36.6%	26.9%	6.5%	0.0%	3.4%	162	7.7
Ontario	31.9%	33.3%	22.4%	9.7%	0.0%	2.6%	903	3.3
Quebec	30.5%	11.8%	22.4%	5.5%	27.5%	2.3%	898	3.3
Atlantic Canada	41.7%	21.8%	23.8%	10.1%	0.0%	2.7%	162	7.7
GENDER								
Male	28.1%	33.4%	20.6%	7.7%	6.1%	4.1%	1842	2.3
Female	30.1%	24.1%	26.1%	10.2%	6.8%	2.6%	1821	2.3
AGE								
<25	20.4%	21.0%	25.7%	21.1%	6.4%	5.4%	166	7.6
25-44	25.9%	25.8%	27.5%	8.2%	8.2%	4.3%	826	3.4
45-64	30.8%	30.2%	22.5%	7.7%	6.3%	2.6%	1575	2.5
65+	36.1%	35.9%	16.9%	5.4%	3.7%	2.0%	1090	3.0
EDUCATION								
High school or less	27.0%	30.2%	20.8%	9.5%	9.0%	3.7%	1133	2.9
College or CEGEP	25.1%	32.5%	25.0%	8.2%	5.9%	3.3%	1150	2.9
University or higher	33.9%	24.7%	24.1%	9.1%	5.0%	3.2%	1378	2.6
COUNTRY OF BIRTH								
Canada	27.8%	28.8%	23.6%	9.1%	7.4%	3.3%	3075	1.8
Other	35.5%	28.9%	21.9%	7.9%	1.9%	3.9%	604	4.0

Approval Rating – Stephen Harper

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

	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



Approval Rating – Thomas Mulcair

Q. Do you approve or disapprove of the way Thomas Mulcair, leader of the Official Opposition and Leader of the New Democratic Party of Canada is handling his job?

	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	26.0%	29.7%	40.7%	3.7%	4568	1.5
REGION						
British Columbia	24.1%	31.2%	42.9%	1.9%	917	3.2
Alberta	16.6%	41.3%	32.8%	9.4%	724	3.6
Saskatchewan	18.7%	38.8%	30.3%	12.2%	285	5.8
Manitoba	27.0%	31.5%	33.9%	7.6%	217	6.7
Ontario	25.5%	32.5%	40.8%	1.2%	1084	3.0
Quebec	34.0%	17.3%	44.2%	4.4%	1124	2.9
Atlantic Canada	23.2%	29.8%	44.0%	3.0%	207	6.8
GENDER						
Male	29.6%	38.1%	30.9%	1.5%	2158	2.1
Female	23.5%	22.6%	51.5%	2.4%	2275	2.1
AGE						
<25	27.5%	30.0%	38.5%	4.0%	211	6.8
25-44	26.0%	29.0%	42.2%	2.9%	1036	3.0
45-64	26.9%	30.5%	41.5%	1.1%	1881	2.3
65+	26.2%	31.0%	42.1%	0.8%	1295	2.7
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High school or less	21.1%	29.4%	47.9%	1.6%	1437	2.6
College or CEGEP	21.5%	30.7%	45.5%	2.3%	1382	2.6
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Liberal Party	51.4%	13.4%	34.1%	1.0%	835	3.4
Green Party	30.3%	24.0%	43.2%	2.5%	298	5.7
Bloc Quebecois	32.6%	19.2%	47.9%	0.3%	238	6.4
Other	16.8%	43.3%	39.9%	0.0%	119	9.0



Approval Rating – Justin Trudeau

Q. Do you approve or disapprove of the way Justin Trudeau, Member of Parliament and candidate for leadership of the Liberal Party of Canada, is handling his job?

	Approve	Disapprove	Don't know	No response	Sample Size	Margin of Error (+/-)
NATIONALLY	36.0%	25.8%	34.6%	3.6%	4568	1.5
REGION						
British Columbia	36.5%	25.4%	36.6%	1.5%	917	3.2
Alberta	23.3%	35.9%	31.8%	8.9%	724	3.6
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Canada	35.9%	27.3%	34.8%	2.0%	3722	1.6
Other	40.3%	21.1%	36.7%	1.9%	747	3.6
CURRENT VOTE INTENTION						
Conservative Party	70.0%	8.5%	20.9%	0.6%	1063	3.0
NDP	20.4%	48.3%	30.3%	1.0%	1142	2.9
Liberal Party	35.6%	22.0%	40.1%	2.3%	835	3.4
Green Party	34.3%	27.1%	36.3%	2.3%	298	5.7
Bloc Quebecois	17.4%	41.5%	41.1%	0.0%	238	6.4
Other	25.2%	36.0%	38.4%	0.5%	119	9.0



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.