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TORIES ENJOY CLEAR BUT MODEST LEAD AS ELECTION LOOMS

Understanding Where Voters are Coming and Going

[Ottawa – March 10, 2011] – Following a brief breakout a month ago, the voter landscape has settled into a pretty stable pattern with the Conservatives enjoying a clear but modest 7.4-point lead over the Liberals. This survey provides some interesting analysis on the question of how stable that lead might be and where voter movements have occurred, and where they are likely to occur in the future. Coupled with an analysis of the underlying demographic and regional patterns, this provides a revealing portrait of the pre-campaign electorate.

The survey data were collected over the past two weeks (excluding weekends) and are based on random sampling of the entire population (land line and cell phone only households, internet and non-internet households). In order to enhance comparability and to isolate real effects we always present the voter intention questions in exactly the same order and position in the survey (to avoid unknown contamination effects). We also employ the same sampling procedures from poll to poll and gather large samples (in this instance, roughly 2,900 cases) in order to strengthen the ability to separate the real and the spurious. Our conclusion is that the electorate have now moved into a pretty stable wait and see mode.

HIGHLIGHTS

- National federal vote intention*:
 - **¤ 35.2% CPC**
 - **¤ 27.8% LPC**
 - ¤ 14.9% NDP
 - ¤ 10.1% Green
 - ¤ 8.8% BQ
 - ¤ 3.1% other
- Direction of country:
 - **¤ 51.6% right direction**
 - **x** 37.6% wrong direction
 - **¤ 10.8% DK/NR**
- Direction of government:
 - **¤ 43.5% right direction**
 - x 44.3% wrong direction
 - **¤ 12.2% DK/NR**
- Second choice:
 - **¤ 10.6% CPC**
 - ¤ 14.9% LPC
 - ¤ 18.1% NDP
 - **¤ 12.4% Green**
 - **2.7% BQ**
 - **2.2% other**
 - **¤ 39.1% no second choice**

*Decided/leaning voters only. Our poll also shows that 14.2% are undecided/ineligible to vote.

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

Apart from the overall national lead, the most notable drift that we have seen over the past several polls is that the Conservatives are now significantly ahead in vote rich Ontario. This is a very significant and fairly newfound advantage for the Conservatives. The Liberals are significantly ahead in the Atlantic and have a small but significant lead over the Conservatives in Quebec, the only real sour note in the poll for Conservatives. The NDP are now within the margin of error of the Conservatives in Quebec. Coupled with other findings in the survey, there is evidence that the NDP could be poised for something of a breakthrough in Quebec. The Bloc remains solidly in the driver's seat in Quebec; an advantage that may be understated given other findings we will



discuss momentarily. There is nothing else particularly novel in the demographic or regional patterns seen in this iteration of our polling.

What is new is an analysis of where voters are coming and possibly going. In addition to our usual questions we revisited the question of how people say they voted in 2008 and compared that to where they are today. We also asked respondents what second choice they might move to in the future. Between these two indicators we see some indicators of loyalty, and potential flux which otherwise wouldn't be evident.

First, the issue of voter mobility which is examined by cross classifying current preference with stated voting behaviour. Depending how we array the table, we can see both where parties have experienced losses and where they have secured gains. The degree to which they end up on the diagonal ("stayers" as opposed to "movers") can be taken as a measure of party loyalty. On that issue, it is interesting to compare the level of voter loyalty in Canada with the United States. Canadians are much more politically promiscuous then our Southern neighbours. In the States, 90% (sometimes more) voted the same way they did in the last election. In Canada, roughly 2 in 3 stick with their last choice reflecting a more fluid, less ideologically entrenched electorate.

Looking at this indicator by party, we see that supporters of the Conservative are the most loyal, with nearly 80 per cent of 2008 supporters staying on board (a finding evident in other indicators as well). The Bloc also fares very well with voter loyalty, whereas the Liberals and NDP experience more voter churning and lower attachment levels. Both the Liberal and NDP supporters are less firmly attached and show more mobility. Unsurprisingly, the Green Party voters are the least attached, reflecting their younger age profile and the fact that the Green Party does better with eligible voters than it does with actual voters.

Another key finding is that a clear majority of all voter movement in Canada over the past three years has been an ongoing transfer back and forth across the Liberal and Conservative support groups. This pattern has a number of interesting implications.

Apart from the tantalizing but practically ludicrous notion that the most natural coalition would be a Conservative-Liberal alliance, these trends in voter movement also underline the depth of the challenges that Michael Ignatieff and the Liberals face. Many potential and actual Liberal voters are relatively ambivalent about the two parties, but the Conservative Party has the larger and more attached base and there is little evidence that the Liberals have had much luck prying these votes loose. In fact, the net transfer across the two constituencies mildly favours the Conservatives, and they are now ahead with a larger and more committed base. The more fluid opportunities exist to the left but to date the evidence is that the Liberals haven't been able to provide much attraction in these quarters. The NDP have a similar problem with their voters casting both right and to the Green Party in a fairly indistinct manner. Finally, Green supporters move in an almost random manner across alternatives. All of this points to a modest Conservative advantage.



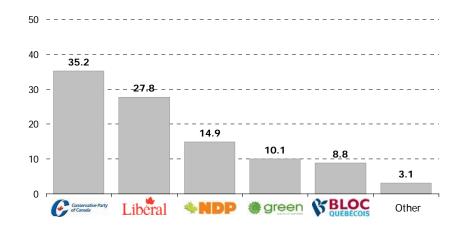
In the case of second choice, the news is less favourable for the Conservative Party. In fact, they have the lowest second choice appeal out of the four federalist parties and it may be that the very strategies which engender loyalty that lower their ceiling with other voters. The NDP fare best as second choice, and this is quite pronounced in Quebec. The Liberals fare better than the Conservatives on second choice, which may offer a mild sense of optimism as we approach an election. Finally, there is an interesting discrepancy between words and deeds where voters tell us they are more likely to move left but the actual mobility patterns suggest that this has decisively not been the case.



Top Line Results:

Federal vote intention

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

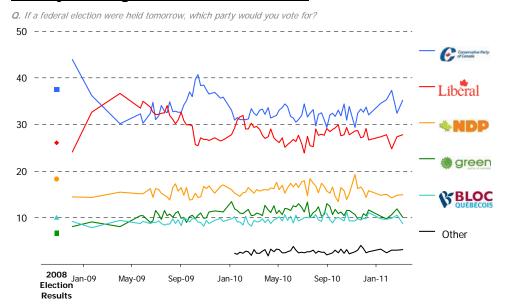


Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 14.2% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; February 24-March 8, 2011 (n=2,488)

Weekly tracking of federal vote intention



Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 14.2% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; most recent data point February 24-March 8, 2011 (n=2,488)



Current federal vote intention by 2008 vote

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

VOTE IN 2008

VOTE INTENTION	Overall	CPC	LPC	NDP	GP	BQ
Conservative Party of Canada	35.2	77.3	18.0	11.5	14.0	4.4
Liberal	27.8	11.5	63.8	13.3	14.2	4.0
NDP	14.9	3.6	8.7	61.6	11.4	7.4
green	10.1	4.0	5.7	5.4	51.8	7.8
BLOC QUÉBÉCOIS	8.8	1.6	1.9	3.7	5.9	73.8
Other	3.1	1.9	1.9	4.4	2.7	2.6

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BASE: Decided voters; February 24-March 8, 2011 (n=2,488)

Second choice

Q. Which party would be your second choice?

FIRST CHOICE

SECOND CHOICE	Second Choice (overall)	CPC	LPC	NDP	GP	BQ	Other
Conservative Party of Canada	10.6		22.2	12.7	11.2	12.3	14.6
Liberal	14.9	20.7		31.7	22.0	15.2	5.9
NDP	18.1	15.7	32.9		22.8	23.9	10.8
green	12.4	10.2	14.6	23.3		16.2	18.1
BLOC	2.7	2.1	2.0	4.1	4.0		5.0
Other	2.2	2.6	1.2	2.7	2.6	1.0	
No second choice	39.1	48.6	27.1	25.5	37.5	31.4	45.6

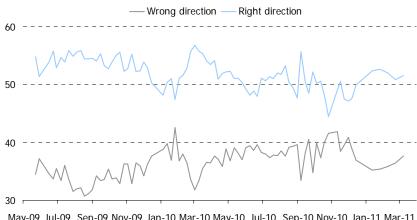
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BASE: Eligible voters; February 24-March 8, 2011 (n=2,817)



Direction of country

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



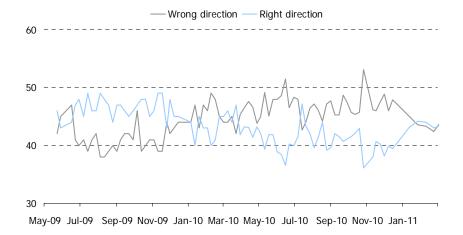
May-09 Jul-09 Sep-09 Nov-09 Jan-10 Mar-10 May-10 Jul-10 Sep-10 Nov-10 Jan-11 Mar-11

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BASE: Canadians; most recent data point February 24-March 8, 2011 (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 February 24-March 8, 2011 (n=half sample)



Detailed Tables:

National Federal Vote Intention

	Consensative Party of Canada	Liberal	*NDP	# green	BLOC QUÉBÉCOIS	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	35.2%	27.8%	14.9%	10.1%	8.8%	3.1%	2488	2.0
REGION								
British Columbia	36.2%	24.0%	21.9%	14.2%	0.0%	3.7%	297	5.7
Alberta	57.3%	17.2%	8.4%	11.3%	0.0%	5.8%	233	6.4
Saskatchewan/Manitoba	45.7%	22.3%	21.1%	7.4%	0.0%	3.4%	153	7.9
Ontario	41.0%	34.0%	14.4%	8.3%	0.0%	2.4%	832	3.4
Quebec	15.4%	21.7%	12.5%	11.3%	35.9%	3.2%	785	3.5
Atlantic Canada	30.9%	40.0%	17.4%	9.3%	0.0%	2.5%	188	7.2
GENDER								
Male	38.4%	27.4%	12.8%	10.2%	7.3%	3.8%	1257	2.8
Female	31.9%	28.1%	17.1%	10.1%	10.4%	2.5%	1231	2.8
AGE								
<25	21.7%	22.1%	18.6%	22.2%	12.5%	2.8%	172	7.5
25-44	31.3%	26.3%	15.5%	11.8%	10.8%	4.3%	705	3.7
45-64	38.9%	28.7%	14.5%	6.9%	8.4%	2.6%	1021	3.1
65+	43.6%	32.1%	12.6%	5.9%	3.6%	2.2%	590	4.0
EDUCATION								
High school or less	35.4%	23.8%	12.5%	12.0%	11.3%	4.9%	693	3.7
College or CEGEP	39.6%	22.0%	15.5%	10.5%	9.4%	3.0%	828	3.4
University or higher	31.5%	35.0%	16.0%	8.6%	6.7%	2.1%	967	3.2
METROPOLITAN CANADA								
Vancouver	39.2%	26.6%	23.7%	8.2%	0.0%	2.4%	91	10.3
Calgary	60.7%	17.4%	7.0%	10.6%	0.0%	4.3%	72	11.6
Toronto	41.1%	38.8%	13.1%	6.5%	0.0%	0.4%	243	6.3
Ottawa	44.8%	36.6%	10.0%	6.4%	0.0%	2.1%	97	10.0
Montreal	10.1%	26.0%	10.8%	10.9%	38.5%	3.7%	298	5.7



Federal Vote Intention - British Columbia

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

	Consumative Party of Canada	Liberal	*NDP	green	Other	Sample Size	Margin of Error (+/-)
OVERALL	36.2%	24.0%	21.9%	14.2%	3.7%	297	5.7
GENDER							
Male	42.3%	23.4%	17.3%	11.8%	5.2%	150	8.0
Female	28.9%	24.9%	26.6%	17.6%	2.0%	147	8.1
AGE							
<25	44.4%	19.7%	6.4%	29.4%	0.0%	18	23.1
25-44	27.8%	23.5%	26.1%	15.9%	6.7%	87	10.5
45-64	31.7%	28.7%	22.4%	15.4%	1.9%	116	9.1
65+	54.3%	18.9%	21.4%	3.0%	2.4%	76	11.2
EDUCATION							
High school or less	43.6%	17.3%	22.2%	9.3%	7.6%	66	12.1
College or CEGEP	33.5%	21.1%	22.8%	19.1%	3.5%	111	9.3
University or higher	33.1%	30.5%	21.1%	13.7%	1.6%	120	9.0

Federal Vote Intention - Alberta

	Consonative Party of Canada	Liberal	*NDP	* green	Other	Sample Size	Margin of Error (+/-)
OVERALL	57.3%	17.2%	8.4%	11.3%	5.8%	233	6.4
GENDER							
Male	65.7%	12.4%	5.5%	6.1%	10.2%	123	8.8
Female	48.9%	21.5%	11.5%	16.6%	1.5%	110	9.3
AGE							
<25	46.7%	14.4%	24.0%	14.9%	0.0%	14	26.2
25-44	57.6%	16.7%	4.4%	14.1%	7.2%	65	12.2
45-64	61.6%	17.8%	7.3%	7.5%	5.9%	101	9.8
65+	54.0%	17.3%	10.9%	11.7%	6.1%	53	13.5
EDUCATION							
High school or less	48.0%	14.2%	10.2%	20.4%	7.1%	70	11.7
College or CEGEP	68.9%	12.1%	10.3%	3.4%	5.4%	70	11.7
University or higher	55.4%	23.4%	5.5%	10.4%	5.2%	93	10.2



Federal Vote Intention - Saskatchewan/Manitoba

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

	Consumative Party of Canada	Liberal	*NDP	* green	Other	Sample Size	Margin of Error (+/-)
OVERALL	45.7%	22.3%	21.1%	7.4%	3.4%	153	7.9
GENDER							
Male	52.3%	17.0%	20.2%	9.5%	1.0%	83	10.8
Female	40.3%	25.5%	22.0%	7.6%	4.7%	70	11.7
AGE							
<25	15.9%	31.8%	19.4%	32.9%	0.0%	6	40.0
25-44	51.0%	19.6%	21.5%	7.9%	0.0%	28	18.5
45-64	46.8%	20.7%	20.4%	7.6%	4.5%	67	12.0
65+	51.6%	19.8%	22.1%	1.7%	4.8%	52	13.6
EDUCATION							
High school or less	48.9%	21.8%	18.6%	8.1%	2.5%	56	13.1
College or CEGEP	54.3%	18.0%	21.1%	2.3%	4.3%	42	15.1
University or higher	37.6%	22.8%	23.6%	14.2%	1.8%	55	13.2

Federal Vote Intention - Ontario

	Construite Party of Canada	Liberal	*NDP	* green	Other	Sample Size	Margin of Error (+/-)
OVERALL	41.0%	34.0%	14.4%	8.3%	2.4%	832	3.4
GENDER							
Male	40.9%	35.0%	12.0%	9.8%	2.3%	447	4.6
Female	40.5%	32.4%	17.3%	7.1%	2.6%	385	5.0
AGE							
<25	25.5%	31.1%	20.1%	17.0%	6.4%	53	13.5
25-44	40.4%	31.9%	14.5%	10.6%	2.5%	198	7.0
45-64	45.2%	33.6%	14.6%	4.7%	1.8%	354	5.2
65+	42.3%	38.9%	11.2%	6.5%	1.1%	227	6.5
EDUCATION							
High school or less	39.6%	29.5%	14.9%	10.5%	5.5%	174	7.4
College or CEGEP	48.1%	24.5%	14.0%	11.6%	1.8%	277	5.9
University or higher	36.2%	41.7%	14.9%	5.6%	1.6%	381	5.0



Federal Vote Intention - Quebec

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

	Consensative Party of Canada	Liberal	*NDP	green	FBLOC QUEBECOIS	Other	Sample Size	Margin of Error (+/-)
OVERALL	15.4%	21.7%	12.5%	11.3%	35.9%	3.2%	785	3.5
GENDER								
Male	19.9%	21.8%	11.0%	11.3%	32.0%	4.0%	348	5.3
Female	14.4%	24.0%	12.3%	9.8%	37.3%	2.2%	437	4.7
AGE								
<25	6.6%	13.8%	20.0%	22.3%	35.6%	1.7%	70	11.7
25-44	13.1%	20.8%	13.5%	11.8%	36.4%	4.5%	277	5.9
45-64	18.4%	23.6%	9.9%	6.8%	38.4%	3.0%	300	5.7
65+	29.9%	31.9%	5.9%	7.9%	23.0%	1.5%	138	8.3
EDUCATION								
High school or less	20.9%	21.8%	5.1%	12.2%	35.8%	4.1%	265	6.0
College or CEGEP	19.1%	20.3%	13.9%	8.6%	35.0%	3.1%	271	6.0
University or higher	11.2%	26.8%	16.0%	10.7%	33.1%	2.2%	249	6.2

Federal Vote Intention - Atlantic Canada

	Consumative Party of Canada	Liberal	*NDP	green	Other	Sample Size	Margin of Error (+/-)
OVERALL	30.9%	40.0%	17.4%	9.3%	2.5%	188	7.2
GENDER							
Male	28.7%	36.5%	16.3%	14.8%	3.7%	106	9.5
Female	31.3%	43.5%	18.4%	5.8%	0.9%	82	10.8
AGE							
<25	18.9%	25.8%	19.8%	35.6%	0.0%	11	29.6
25-44	24.6%	39.8%	18.1%	12.1%	5.3%	50	13.9
45-64	38.3%	38.8%	17.8%	3.7%	1.4%	83	10.8
65+	32.9%	52.2%	12.9%	1.9%	0.0%	44	14.8
EDUCATION							
High school or less	32.3%	37.8%	14.7%	13.4%	1.9%	62	12.5
College or CEGEP	37.8%	36.9%	15.0%	7.2%	3.1%	57	13.0
University or higher	20.8%	44.2%	21.7%	11.1%	2.2%	69	11.8



Second Choice

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

	Greenwitter Farty of Canada	Liberal	*NDP	green	BLOC QUÉBECOIS	Other	No 2 nd choice	Sample Size	Margin of Error (+/-)
NATIONALLY	11%	15%	18%	12%	3%	2%	39%	2817	1.9
REGION									
British Columbia	12%	17%	16%	17%	0%	3%	35%	330	5.4
Alberta	5%	15%	13%	12%	0%	2%	53%	265	6.0
Saskatchewan/Manitoba	9%	17%	19%	11%	0%	2%	43%	182	7.3
Ontario	11%	16%	18%	12%	0%	3%	40%	923	3.2
Quebec	12%	11%	17%	11%	11%	1%	37%	897	3.3
Atlantic Canada	12%	17%	28%	12%	0%	1%	30%	220	6.6
GENDER									
Male	9%	15%	20%	13%	3%	3%	37%	1363	2.7
Female	12%	15%	16%	11%	3%	2%	41%	1454	2.6
AGE									
<25	13%	14%	14%	17%	2%	1%	40%	195	7.0
25-44	12%	15%	19%	13%	4%	3%	35%	815	3.4
45-64	10%	15%	19%	12%	3%	2%	39%	1158	2.9
65+	8%	14%	18%	10%	1%	2%	48%	649	3.9
EDUCATION									
High school or less	11%	12%	16%	11%	4%	2%	44%	823	3.4
College or CEGEP	10%	14%	17%	12%	2%	3%	42%	941	3.2
University or higher	10%	19%	20%	14%	2%	2%	33%	1053	3.0
VOTE INTENTION									
Conservative Party of Canada	0%	21%	16%	10%	2%	3%	49%	881	3.3
Liberal Party of Canada	22%	0%	33%	15%	2%	1%	27%	656	3.8
NDP	13%	32%	0%	23%	4%	3%	26%	351	5.2
Green Party	11%	22%	23%	0%	4%	3%	37%	235	6.4
Bloc Quebecois	12%	15%	24%	16%	0%	1%	31%	289	5.8
Undecided	15%	6%	11%	18%	5%	0%	46%	75	11.3



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	51.6%	37.6%	10.8%	1368	2.7
REGION					
British Columbia	54.7%	33.7%	11.7%	161	7.7
Alberta	55.1%	33.0%	11.9%	127	8.7
Saskatchewan/Manitoba	59.3%	30.2%	10.4%	89	10.4
Ontario	53.8%	37.1%	9.1%	459	4.6
Quebec	42.1%	45.5%	12.4%	430	4.7
Atlantic Canada	54.1%	34.1%	11.7%	102	9.7
GENDER					
Male	54.9%	37.6%	7.5%	681	3.8
Female	48.1%	37.7%	14.2%	687	3.7
AGE					
<25	55.3%	29.4%	15.3%	107	9.5
25-44	51.8%	41.5%	6.6%	417	4.8
45-64	50.6%	39.3%	10.1%	534	4.2
65+	50.3%	31.5%	18.2%	310	5.6
EDUCATION					
High school or less	46.7%	40.3%	12.9%	409	4.9
College or CEGEP	55.3%	33.8%	10.9%	432	4.7
University or higher	52.0%	38.8%	9.2%	527	4.3
CURRENT VOTE INTENTION					
Conservative Party of Canada	78.9%	15.8%	5.3%	422	4.8
Liberal Party of Canada	41.0%	45.4%	13.6%	308	5.6
NDP	38.5%	50.2%	11.4%	178	7.4
Green Party	36.9%	50.4%	12.7%	99	9.9
Bloc Quebecois	32.1%	59.6%	8.2%	127	8.7
Undecided	19.7%	73.3%	6.9%	32	17.3



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	43.5%	44.3%	12.2%	1524	2.5
REGION					
British Columbia	47.8%	40.3%	11.9%	181	7.3
Alberta	53.4%	35.1%	11.5%	146	8.1
Saskatchewan/Manitoba	33.0%	47.9%	19.1%	102	9.7
Ontario	48.9%	38.6%	12.4%	481	4.5
Quebec	33.7%	56.0%	10.3%	494	4.4
Atlantic Canada	38.2%	49.2%	12.6%	120	9.0
GENDER					
Male	45.9%	44.5%	9.6%	717	3.7
Female	41.4%	44.1%	14.4%	807	3.5
AGE					
<25	43.9%	42.6%	13.5%	107	9.5
25-44	39.5%	50.3%	10.1%	422	4.8
45-64	44.1%	44.4%	11.5%	637	3.9
65+	49.6%	33.6%	16.7%	358	5.2
EDUCATION					
High school or less	43.3%	39.7%	17.0%	451	4.6
College or CEGEP	46.3%	42.0%	11.7%	519	4.3
University or higher	41.2%	49.7%	9.1%	554	4.2
CURRENT VOTE INTENTION					
Conservative Party of Canada	82.2%	10.5%	7.2%	460	4.6
Liberal Party of Canada	31.1%	58.8%	10.0%	348	5.3
NDP	27.1%	62.4%	10.5%	173	7.5
Green Party	36.6%	49.9%	13.6%	136	8.4
Bloc Quebecois	12.6%	79.3%	8.1%	162	7.7
Undecided	19.8%	72.9%	7.3%	43	14.9



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 February 24 – March 8, 2011¹. In total, a random sample of 2,892 Canadians aged 18 and over responded to the survey (including a sub-sample of 2,488 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 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.

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