

A MID-CAMPAIGN CHECK-UP:

WHAT ARE THE FORCES SORTING THE ELECTORATE AND WHAT ARE THE PROSPECTS FOR PARTIES IN THE HOME STRETCH?

[Ottawa – September 17, 2015] As one of the most protracted campaigns in political history lurches to the midpoint, it might be helpful to take stock of what we know. We begin by noting that we don't have much idea of what to expect on October 19th, but we do know a few things not to expect. We also have a clearer idea of the key forces that are underpinning voter choice (and which ones aren't). It is also clear that some of the confusion in understanding what is going on results from a profound cleavage across those supporting the incumbent and all other voters. This chasm is expressed demographically and in terms of key issues and core values.

Federal vote intention

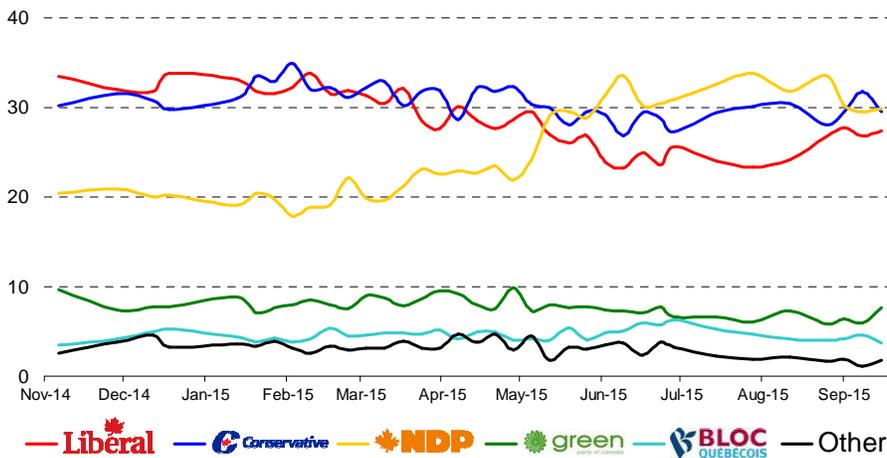
Q. If a federal election were held tomorrow, which party would you vote for?

National Results

(Change over September 2-8 poll below)



2011 Election Results



Note: These figures are based on decided and leaning voters only; 6.5% of respondents say they are undecided and 6.6% are ineligible to vote / skipped the question.

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BASE: Canadians; September 9-15, 2015 (n=2,704), MOE +/- 1.9%, 19 times out of 20

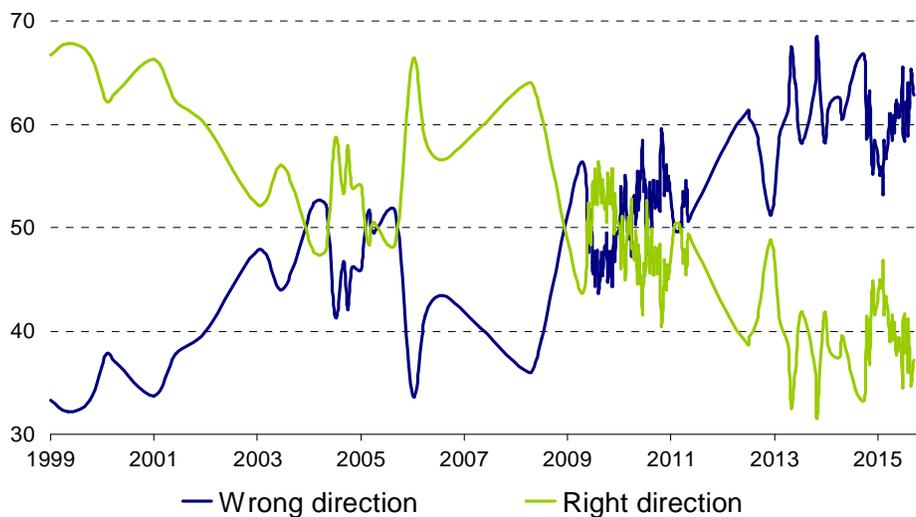
Let's begin with a snapshot of where voters are right now. What is immediately evident is that whatever the campaigns have accomplished to date, they have not produced any real guidance about the final outcome. If anything, the picture is muddier now than at the outset of the campaign. The NDP has come down modestly, the Conservatives are stuck sub-thirty, and the

Liberals have established a stronger presence than they did at the outset of the campaign. We basically have a three-way tie with some evidence of momentum favouring the Conservatives right now.

It also appears that it is highly unlikely we are going to see anyone breaking away from the field and winning a majority. The Conservatives are ten points back of their 2011 result and while the NDP and Liberal Party have both flirted with majority territory over the past year, they now seem locked in a churn of promiscuous progressive voters seeking relief from the Conservative era. We would also add that desire for change is stronger than in the last three elections and approval of current trajectories of the country government and Stephen Harper all are considerably more challenging than in 2011.

Direction of government (adjusted*)

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



*Figures adjusted to exclude those who skipped the question.

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BASE: Canadians (half-sample); September 9-15, 2015 (n=1,406), MOE +/- 2.6%, 19 times out of 20

In terms of issues, *it really is the economy, stupid*. Whether it is the short-term malaise and R-word or deeper long term anxieties about the end of progress and the erosion of the middle class, the economy has eclipsed all other issue as the campaign has matured. We don't see any party having carved out high ground on the pinnacle issue yet, but the Liberals have definitely moved very much back in contention on the strength of much improved credibility on the economy.¹

¹ EKOS Research Associates, "Three-Way Tie as Voters Try and Sort Out Who Can Solve the Economy", September 4, 2015. Available online at: <http://goo.gl/riZ79g>

Why has this happened? It appears that one of the ballot booth issues that is swinging voters is the role of the federal government in both stimulating the economy and insulating citizens from the effects of a weak economy. It appears that the Liberals' decision to abandon the commitment to (immediately) balancing the budget and using borrowing to invest in major new initiatives is striking a resonant chord with non-Conservative voters. Whereas the Liberal positioning on C-51 probably left them offside with progressive voters and bolstered Thomas Mulcair's fortunes,² the newly different positions on balanced budget may be reversing some of those gains that the NDP secured.

On top of all of that is the Conservative Party's trumpeting of its newfound surplus. There is no apparent immediate read on this (although the Conservatives moved up in our last two nights of polling) and the impacts of this are unclear. Conservative voters certainly place a much higher priority on balanced budgets than the centre-left spectrum at this time. This has left Mr. Mulcair in the challenging position of explaining where the revenue will come to fund his version of a progressive agenda and to get a moribund economy moving again. This issue will unfold with clearer trajectories in the coming weeks but it is interesting to see the initial impacts. It is interesting to note that the voter interest in public accounts is extremely modest at this time outside of the Conservative base.³ It is therefore ironic that it appears to be a significant sorting mechanism at this time.

While voter preoccupation with the economy is unlikely to dissipate it is possible that values issues and culture wars could become a major additional factor. The Syrian refugee crisis has had a huge media impact, but frankly the impact on the political landscape is difficult to discern and very inconsistent with the initial pundit consensus that this was a huge pratfall for the Harper government. In fact, the tacit and explicit values messages may have shored up the Conservative base. Somewhat surprisingly, the progressive and moderate parties of the centre and left have had less success in emotionally engaging their voters through an appeal to the threat to the dominant values of the rest of the political spectrum which are so scantily acknowledged in the Conservative agenda and rhetoric.

A looming vision & values war?

We see a huge fault line across older and younger Canada on this and related issues such as austerity versus investment. The values and issue preferences of the older, less educated constituency for the Conservatives are profoundly in tension with the values of the rest of the population. The 'obviousness' of the need to shift from a military focus to a humanitarian emphasis is completely alien to the thinking of Conservative Canada.⁴

² EKOS Research Associates, "NDP Continues to Rise as Liberals and Conservatives Continue to Slide", June 12, 2015. Available online at: <http://goo.gl/7GMj6A>

³ EKOS Research Associates, "How the Yawning Chasm across Conservative and Progressive Canada Masks the Real Prospects for Harper's Conservatives", September 11, 2015. Available online at: <http://goo.gl/K1PRUP>

⁴ Ibid.

Ethics not sorting voters (yet?)

And how about that ethics thing? Clearly, ethics can move voters as Harper must remember as it was his promise to restore ethics and accountability (following the Sponsorship scandal) which redrew the political landscape in Canada. It is therefore passing strange that there is no lingering evidence of fallout from the Duffy affair for the incumbent. This may change and the critical mass point of anger and regime fatigue may be passed as the campaign matures. But so far, it hasn't and we wouldn't rule out that a deeply mistrustful and skeptical electorate have become so inured to such problems that they just aren't registering in voter choice.

Regional and demographic patterns: hardening fault lines

The campaign to date is showing some clear and interesting patterns in terms of demographics and regions. The largest demographic split is the older versus younger Canada which is keeping the Conservative Party in the game. If voting were limited to seniors, the Conservatives would be well within reach of a majority. Without it, the Conservatives would be five points back and facing political disaster. They are, however, voting and this group will be critical to watch.

Impact of senior vote

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

Overall



Seniors only



Canadians under 65 only

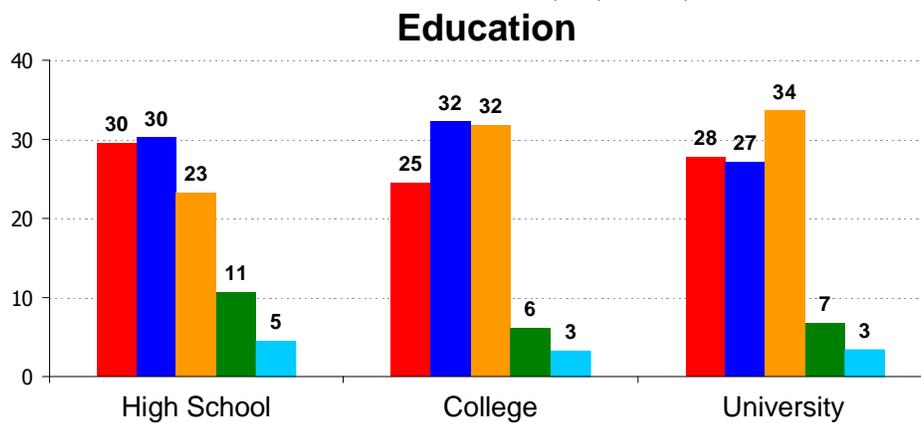
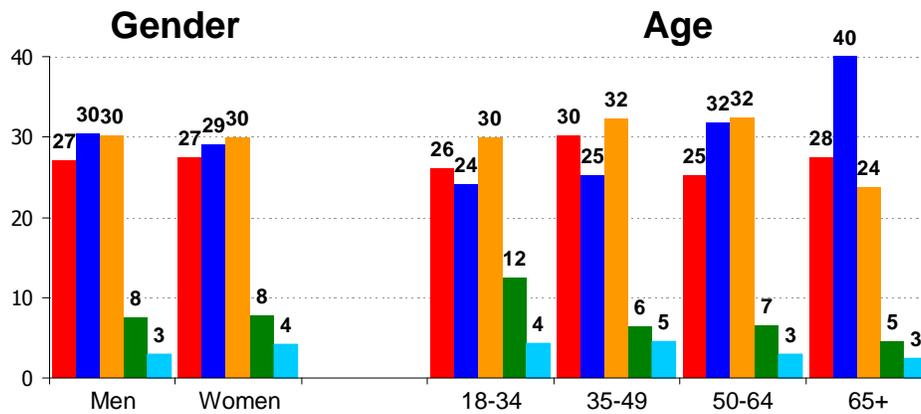
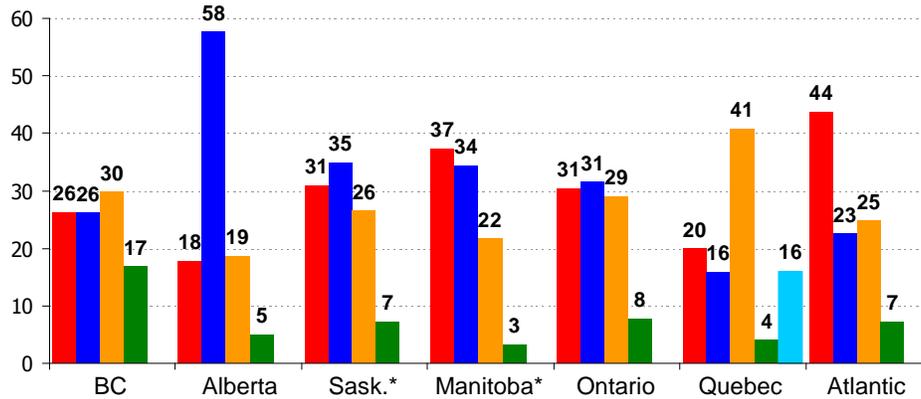


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BASE: Canadians; September 9-15, 2015 (n=2,704), MOE +/- 1.9%, 19 times out of 20

Vote intention by region/demographics

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



■ Liberal
 ■ Conservative
 ■ NDP
 ■ green
 ■ BLOC QUEBÉCOIS
 ■ Other

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BASE: Canadians; September 9-15, 2015 (n=2,704), MOE +/- 1.9%, 19 times out of 20

The other critical divide is across university educated and less educated Canada. In addition to appealing to older Canadians, Stephen Harper has much stronger appeal to the less educated. Some of the sharpest value disputes are across this divide and the latte-sipping professional class are extremely unhappy with the national direction charted by the Harper government. This is certainly true on immigration and refugee determination, but also a range of other issues. The indifference – and perhaps hostility – to science and reason evident in the party’s positioning may work with their base, but may have provided fertile ground for an appeal to the threats to the values of the moderate and progressive majority in Canada.

The regions are quite different for the most part. Atlantic Canada is really fatigued with the current government and leaning strongly Liberal but the NDP have live prospects as well. Quebec is the most settled and least engaged region. For now, it looks like a lock for the NDP, although the Liberals are showing some modest signs of life after a near-death experience. Ontario is the least predictable and most important race; the Liberals are doing better here but this is really a tight three-way race with huge vote splitting implications. Alberta may be showing some buyer’s remorse with their new provincial government and the Conservatives have a huge lead there. British Columbia is a very interesting three-way race (and, in some ridings, a tight *four-way* race). Voters could be waiting for the unpredictable outcome of British Columbia to settle what looks like a very tight federal election.

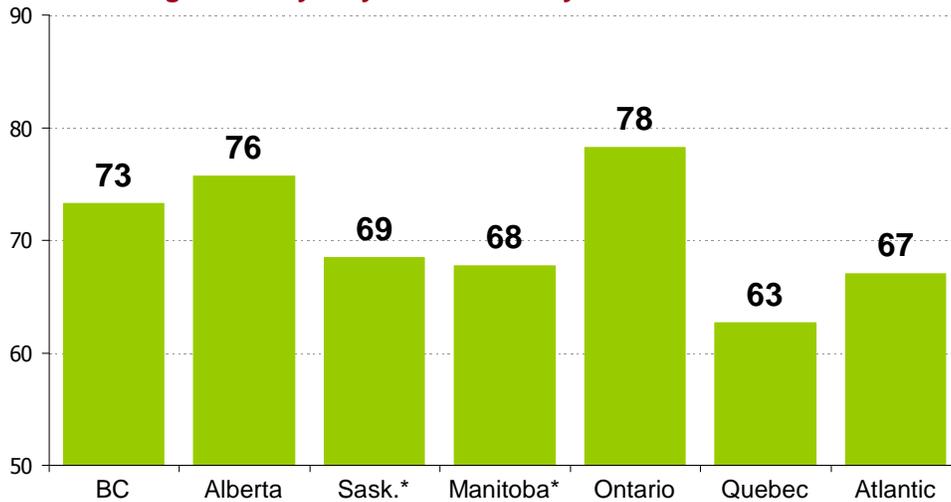
One interesting and potentially important new finding is that the self-rated certainty to vote is now higher among those who have cut their land lines. In 2011, to our chagrin we found out that cellphone-only citizens shared two characteristic: 1.) lower tendency to select the Conservatives; and 2.) lower tendency to vote. These two factors coalesced to produce a larger prediction error.⁵ This time out, the much larger cellphone-only population is still much less likely to support the Conservatives. They are, however, more likely – not less likely – to claim that they are certain to vote. This could be a critical factor in the final outcome.

⁵ Frank Graves, “*Accurate Polling, Flawed Forecast*”, June 17, 2011. Available online at: <http://goo.gl/HNJPIy>

Likelihood of voting by province

Q. What is the per cent chance that you will vote in the next federal election?

Percentage who say they are 100% likely to vote



*Results for Saskatchewan/Manitoba should be interpreted with caution due to small sample sizes

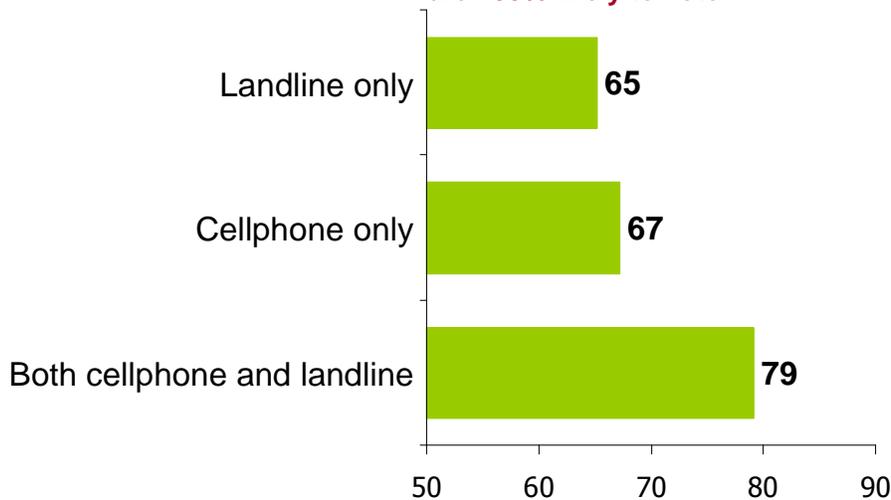
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Likelihood of voting by phone type

Q. What is the per cent chance that you will vote in the next federal election?

Percentage who say they are 100% likely to vote



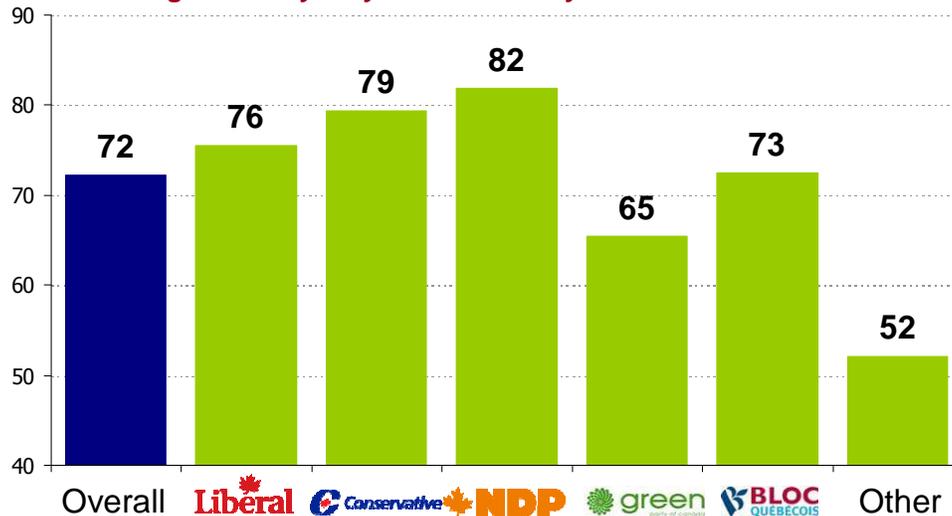
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BASE: Canadians; September 9-15, 2015 (n=2,704), MOE +/- 1.9%, 19 times out of 20

Likelihood of voting by party support

Q. What is the per cent chance that you will vote in the next federal election?

Percentage who say they are 100% likely to vote



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BASE: Canadians; September 9-15, 2015 (n=2,704), MOE +/- 1.9%, 19 times out of 20

Final thoughts

The election is utterly unpredictable right now. No one has cracked the master issue of the economy to this point in time. The Liberals are back in the game but the NDP are also much better positioned now than they were at this time in 2011. It doesn't appear that ethics and regime fatigue are as critical issues as some have thought. It is possible that the campaign will broaden to highlight the formidable faultiness dividing Conservative and progressive Canada. The Conservatives are certainly hanging in but they have the sternest set of challenges to victory, and they need a majority or near-majority to continue given the adamant desire for change in the rest of the electorate.⁶ We will probably hear more about coalitions, particularly if the campaign remains this unprecedented three-way log-jam.

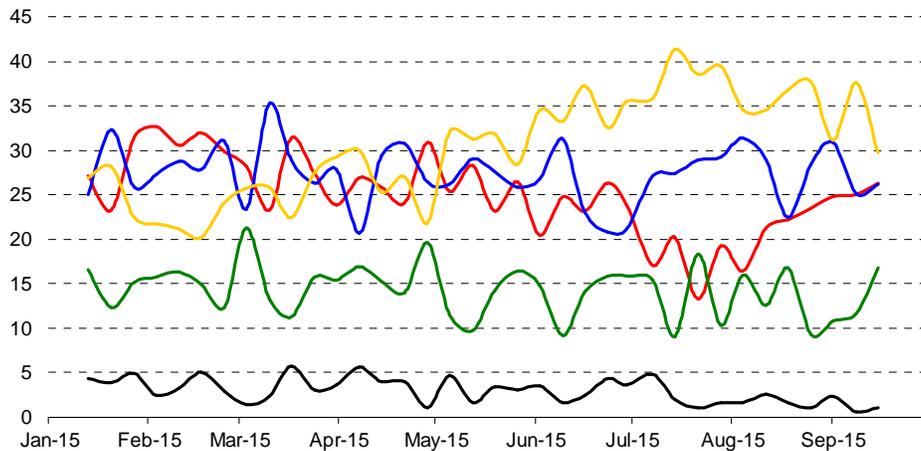
So this is shaping up to be a pollster's nightmare as we follow the long trail home to Election Day. Best bets now are a minority of some sort.

⁶ EKOS Research Associates, "Logjam Continues as Canadians Become More Receptive to Innovative Political Approaches", May 29, 2015. Available online at: <http://goo.gl/nxnhLU>

Tracking vote intention for select regions

Tracking vote intention: British Columbia

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



— Liberal — Conservative — NDP — green — Other

Note: The data on federal vote intention are based on decided and leaning voters only.

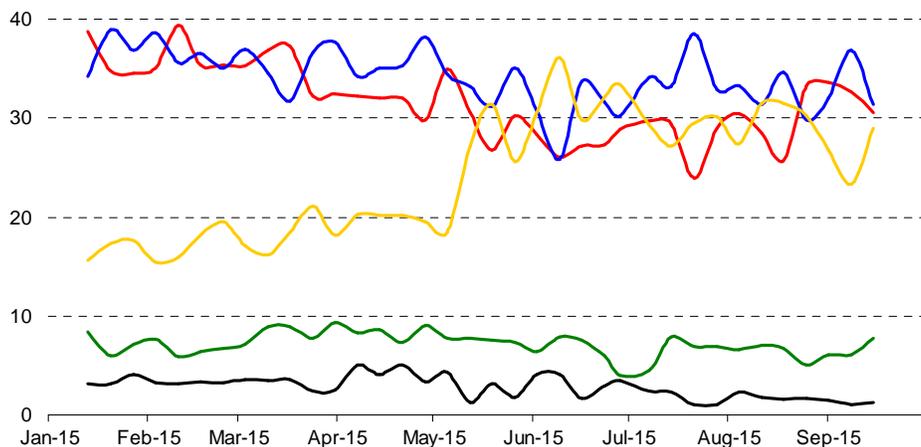
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BASE: British Columbia residents; September 9-15, 2015 (n=434), MOE +/- 4.7%, 19 times out of 20

Tracking vote intention: Ontario

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



— Liberal — Conservative — NDP — green — Other

Note: The data on federal vote intention are based on decided and leaning voters only.

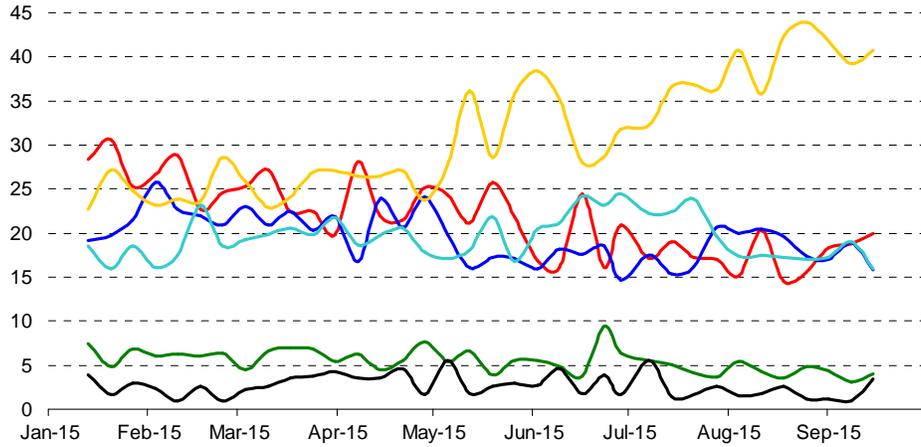
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BASE: Ontario residents; September 9-15, 2015 (n=786), MOE +/- 3.5%, 19 times out of 20

Tracking vote intention: Quebec

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: Quebec residents; September 9-15, 2015 (n=599), MOE +/- 4.0%, 19 times out of 20

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 Party	Conser- vative Party	NDP	Green Party	Bloc Québécois	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	27.4%	29.6%	29.9%	7.6%	3.7%	1.8%	2392	2.0
REGION								
British Columbia	26.3%	26.2%	29.7%	16.8%	–	1.0%	383	5.0
Alberta	17.7%	57.6%	18.5%	5.0%	–	1.2%	300	5.7
Saskatchewan	31.0%	34.9%	26.4%	7.2%	–	0.5%	121	8.9
Manitoba	37.3%	34.4%	21.6%	3.3%	–	3.3%	106	9.5
Ontario	30.5%	31.4%	29.0%	7.8%	–	1.3%	710	3.7
Quebec	20.0%	15.8%	40.8%	4.0%	16.0%	3.4%	529	4.3
Atlantic Canada	43.7%	22.6%	24.7%	7.3%	–	1.7%	235	6.4
GENDER								
Male	27.1%	30.4%	30.1%	7.5%	3.0%	2.0%	1157	2.9
Female	27.4%	29.0%	29.9%	7.8%	4.2%	1.6%	1211	2.8
AGE								
<35	26.1%	24.1%	29.9%	12.4%	4.3%	3.1%	208	6.8
35-49	30.2%	25.2%	32.2%	6.4%	4.5%	1.5%	502	4.4
50-64	25.2%	31.8%	32.4%	6.5%	3.0%	1.1%	834	3.4
65+	27.5%	40.0%	23.7%	4.5%	2.5%	1.7%	829	3.4
EDUCATION								
High school or less	29.5%	30.2%	23.3%	10.6%	4.5%	1.9%	509	4.3
College or CEGEP	24.5%	32.3%	31.7%	6.1%	3.2%	2.2%	765	3.5
University or higher	27.8%	27.1%	33.6%	6.7%	3.4%	1.3%	1080	3.0

Direction of Country

Q. [Half-sample only] 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	36.7%	53.2%	10.1%	1298	2.7
REGION					
British Columbia	34.7%	48.9%	16.4%	223	6.6
Alberta	51.1%	37.2%	11.7%	141	8.3
Saskatchewan	35.4%	47.6%	17.0%	70	11.7
Manitoba	40.7%	47.3%	12.0%	59	12.8
Ontario	37.4%	55.5%	7.1%	384	5.0
Quebec	31.5%	59.2%	9.3%	273	5.9
Atlantic Canada	32.9%	57.7%	9.4%	146	8.1
GENDER					
Male	43.0%	49.8%	7.2%	598	4.0
Female	33.6%	60.7%	5.7%	634	3.9
AGE					
<35	36.6%	53.5%	9.9%	117	9.1
35-49	34.0%	62.8%	3.2%	265	6.0
50-64	37.4%	57.6%	5.0%	404	4.9
65+	47.4%	43.5%	9.0%	449	4.6
EDUCATION					
High school or less	39.8%	54.4%	5.8%	266	6.0
College or CEGEP	42.4%	49.5%	8.0%	404	4.9
University or higher	33.0%	61.1%	5.9%	552	4.2
CURRENT VOTE INTENTION					
Liberal Party	30.9%	63.3%	5.8%	310	5.6
Conservative Party	78.3%	17.5%	4.2%	347	5.3
NDP	12.3%	80.0%	7.7%	344	5.3
Green Party	37.2%	53.2%	9.6%	64	12.3
Bloc Québécois	24.4%	72.9%	2.7%	35	16.6

Direction of Government

Q. [Half-sample only] 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	34.6%	58.4%	7.0%	1406	2.6
REGION					
British Columbia	34.5%	60.6%	4.8%	211	6.8
Alberta	51.3%	43.5%	5.3%	195	7.0
Saskatchewan	36.2%	52.7%	11.1%	71	11.6
Manitoba	36.1%	55.6%	8.2%	65	12.2
Ontario	33.9%	58.3%	7.7%	402	4.9
Quebec	30.3%	62.5%	7.2%	326	5.4
Atlantic Canada	23.1%	69.7%	7.3%	130	8.6
GENDER					
Male	36.7%	59.1%	4.2%	629	3.9
Female	34.4%	60.6%	4.9%	721	3.7
AGE					
<35	30.7%	64.1%	5.2%	128	8.7
35-49	31.3%	64.6%	4.2%	277	5.9
50-64	37.9%	59.2%	2.9%	495	4.4
65+	45.4%	47.8%	6.8%	456	4.6
EDUCATION					
High school or less	41.1%	52.2%	6.7%	304	5.6
College or CEGEP	35.3%	61.1%	3.6%	429	4.7
University or higher	30.9%	65.1%	4.0%	612	4.0
CURRENT VOTE INTENTION					
Liberal Party	15.0%	82.7%	2.3%	332	5.4
Conservative Party	86.7%	9.5%	3.8%	414	4.8
NDP	11.5%	84.5%	4.0%	348	5.3
Green Party	24.5%	68.9%	6.6%	83	10.8
Bloc Québécois	21.7%	78.3%	0.0%	44	14.8

Methodology:

This study was conducted using High Definition Interactive Voice Response (HD-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.

The field dates for this survey are September 9-15, 2015. In total, a random sample of 2,704 Canadian adults aged 18 and over responded to the survey. The margin of error associated with the total sample is +/- 1.9 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 by **age, gender, region, and educational attainment** to ensure the sample's composition reflects that of the actual population of Canada according to Census data.