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TECTONIC REALIGNMENT OR EPHEMERAL BOUNCE?

LIBERALS ENJOY HIGHEST SUPPORT LEVELS SINCE NOVEMBER 2005

[Ottawa – May 8, 2013] – It has been less than a month since Trudeau’s landslide leadership victory and his party has been vaulted into a commanding 12-point lead. At nearly 39 points, the Liberals are within striking distance of a majority government, a feat the party has not achieved in over seven years. The Conservatives, meanwhile, sit at just over 26 per cent while the NDP is holding steady after its nearly 10-point decline since August of last year. The NDP slide almost directly coincides with the appearance of Justin Trudeau and evidence suggests that his rise is almost entirely responsible for the NDP swoon. In the case of the even larger drop in Conservative support, there are other more important factors – notably a darkening outlook on national direction and growing regime fatigue.

For a Liberal party experiencing a near death experience two years ago, this resurrection is astonishing. The Liberals lead everywhere outside the Prairies, including in the key battlegrounds of Ontario and Quebec. They also lead among men, women, and every age group and educational cohort. The question of whether or not this is some ephemeral bounce or a more tectonic realignment of the political landscape remains unclear. We believe the answer lies somewhere between these two extremes.

First of all, it appears that much of the Liberal rise wasn’t a grand jump following a convention (which did occur to some extent with their last two leaders). This latest spike upward may well be a further convention bounce, but the steady rise from the end of summer 2012 to the spring of 2013 was more of a march than a bounce. Few were paying attention to the plethora of lightly viewed leadership debates involving a large cast of largely forgotten contenders. It appears that

HIGHLIGHTS

- **Federal vote intention:**
 - ▣ **38.6% Liberal Party**
 - ▣ **26.2% Conservative Party**
 - ▣ **23.9% NDP**
 - ▣ **6.3% Green Party**
 - ▣ **4.2% Bloc Québécois**
 - ▣ **0.9% Other**
- **“Likely voter” model¹:**
 - ▣ **34.5% Liberal Party**
 - ▣ **31.2% Conservative Party**
 - ▣ **24.0% NDP**
 - ▣ **5.0% Green Party**
 - ▣ **4.2% Bloc Québécois**
 - ▣ **1.0% Other**
- **Direction of country**
 - ▣ **36.6% Right direction**
 - ▣ **50.1% Wrong direction**
- **Direction of government**
 - ▣ **27.3% Right direction**
 - ▣ **56.8% Wrong direction**

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

¹ In this survey, we asked respondents how they voted in the 2011 federal election. Our “likely voter” model involves weighting the responses of those who voted in 2011 by the actual 2011 election results. Those who did not vote in 2011 were assigned a weight of 1. Please note that this model is different from the “likely voter” model we reported in our April 12th release titled “Approaching Midpoint”, where those who did not vote in 2011 were dropped altogether.



the rise over this period was coincidental with a profound rise in awareness of who Justin Trudeau is and a less spectacular but positive lean to consider him in a favourable light.^{2 3 4}

Meanwhile, Thomas Mulcair stalled in recognition levels (now lower than those for Justin Trudeau) while his approval ratings declined. Worse, he shed a large number of his supporters to the rejuvenated Liberal Party. Mr. Mulcair is in real danger of ceding the mantle of the “alternative” to Mr. Harper. There are a large group of voters disaffected with the current government who are relatively indifferent about who should replace the current government. This includes a large number of erstwhile Liberal supporters who shifted to the NDP two years ago. These and other voters who don’t like the Harper government will (and are) moving to the Liberals if they seem a more plausible bet to depose Prime Minister Harper. It also appears that discouraged traditional Liberal voters (who stayed home in 2011) are returning to the fold.

So was Peter Newman’s view that the Liberal is dead wrong and is the party’s seemingly endless period in the political penalty box, which began following the sponsorship scandal, drawing to a close? Are the Liberals poised to reassume the reins of power and their historical role as the Natural Governing Party under the stewardship of a new charismatic Trudeau? This tectonic shift back to the future is no more plausible than the ephemeral bounce hypothesis. As our likely voter model shows, the (highly hypothetical) race is much closer when we focus on likely voters. Rather than the heady 13-point lead with all eligible voters, the lead narrows to a much closer 3 points, pretty close to a tie in terms of statistical significance.

We also note that fanciful dreams of a return to glory warmed Liberal hearts following the selection of Mr. Dion and Mr. Ignatieff, only to be dashed in the hard light of electoral realities, not midterm polls. Prime Minister Stephen Harper maintains a formidable political force in the Conservative Party and they still confront the very auspicious political arithmetic associated with a fragmentation of the center left against a unified right.

Despite necessary caution about the significant of these shifts, there is definitely something new afoot. it is much too early to declare a tectonic shift but it is also clear that this isn’t simply a mercurial bubble. The NDP seem to have (at least temporarily) surrendered the mantle of the alternative to the current government. It also appears that Mr. Harper may be encountering some really profound longer term threats to continued success. The public keep reaching new lows in terms of confidence in the trajectory of the country and the federal government. Longer term outlook on the economy is very grim and Mr. Harper’s base has shrunk to record lows in tandem with his approval rating. The old playbook stalwarts of negative ads and a tough on terror response to recent events do not seem to be reversing the Conservatives’ diminished prospects. So while it is premature to suggest that Stephen Harper’s portable armoured limousine might be turning into a pumpkin, this possibility is certainly on the table.

² EKOS Research Associates, “*Shifting Political Prospects for Stephen Harper*”, April 12, 2013. Accessible online at: <http://goo.gl/18K3g>

³ EKOS Research Associates, “*The Trudeau Effect*”, April 14, 2013. Accessible online at: <http://goo.gl/TFxMY>

⁴ EKOS Research Associates, “*Mr. Mulcair Has a Bit of a Loyalty Problem*”, April 16, 2013. Accessible online at: <http://goo.gl/4Uv3n>



Top Line Results:

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 9.0% of respondents are undecided and 1.2% are ineligible to vote.

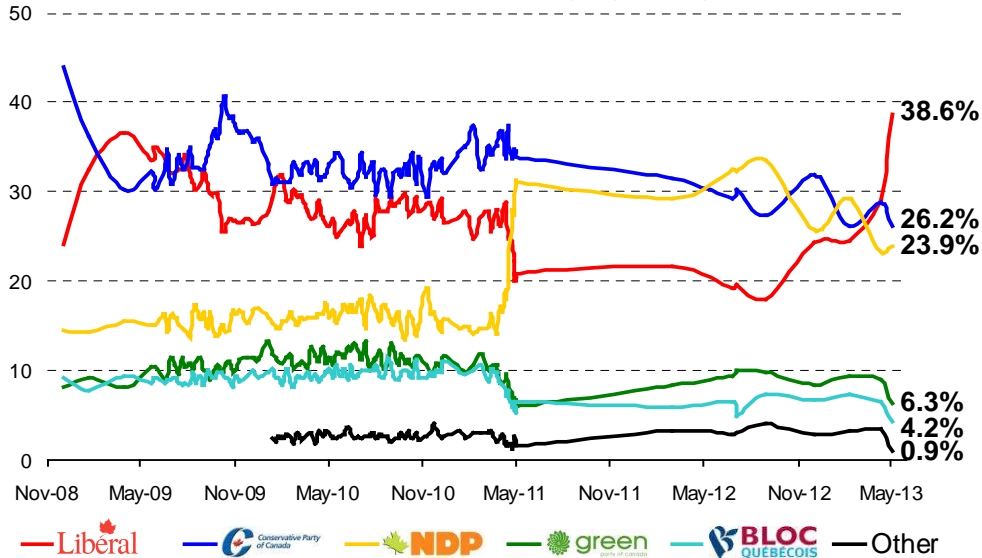
*Our “likely voters” involves dropping those respondents who did not vote in the 2011 Federal Election and then weighting the remaining cases by how they voted.

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BASE: Canadians; April 30-May 2, 2013 (n=1,309)

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 9.0% of respondents are undecided and 1.2% are ineligible to vote.

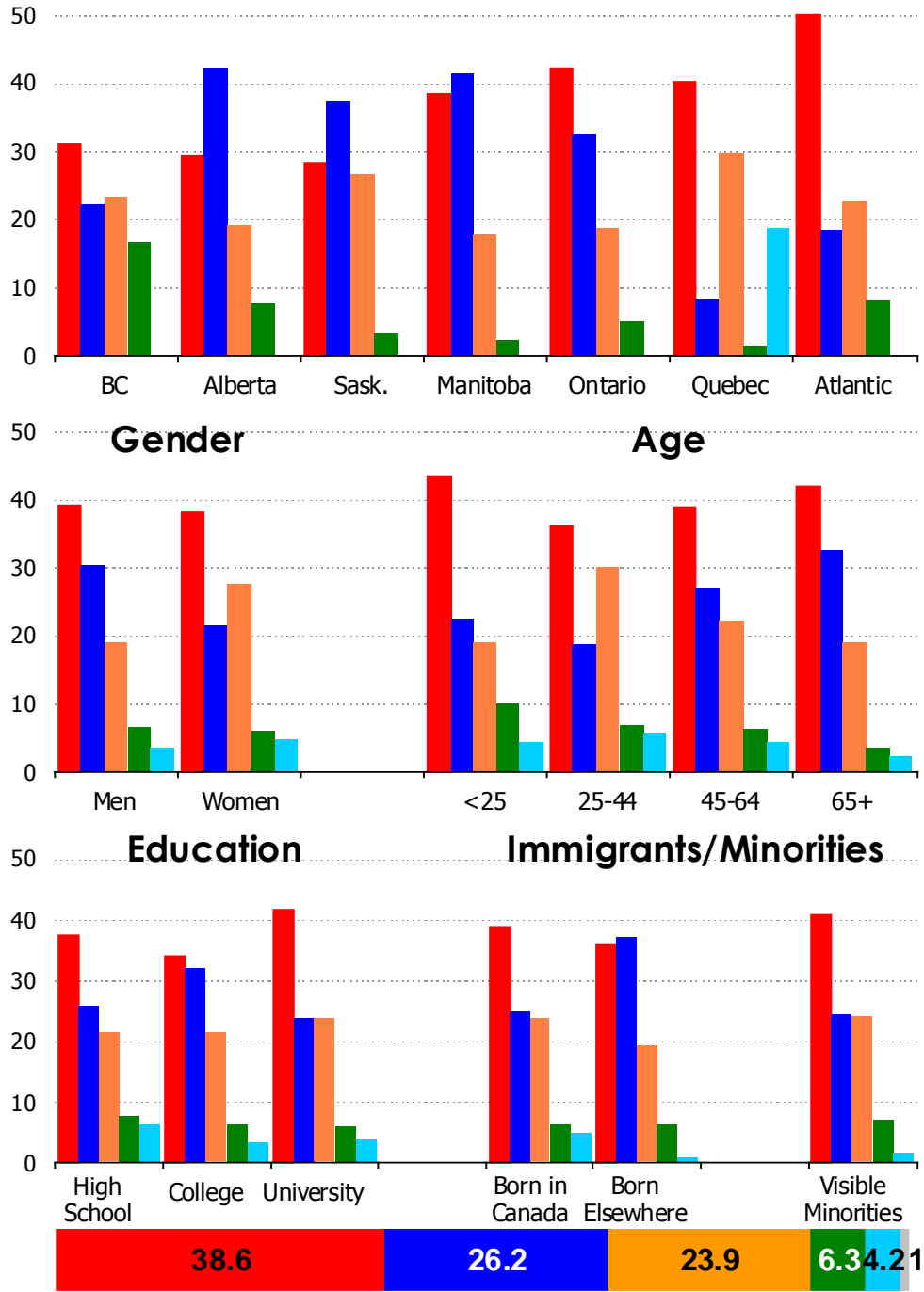
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BASE: Canadians; most recent data point April 30-May 2, 2013 (n=1,309)



Vote intention by key demographics

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

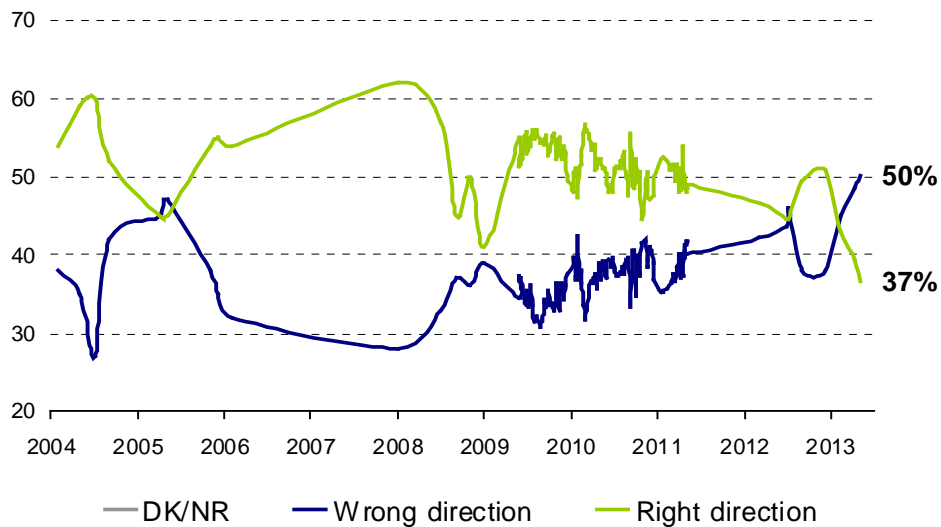


Liberal
 Conservative Party of Canada
 NDP
 Green Party of Canada
 BLOC QUEBÉCOIS
 Other



Direction of country

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

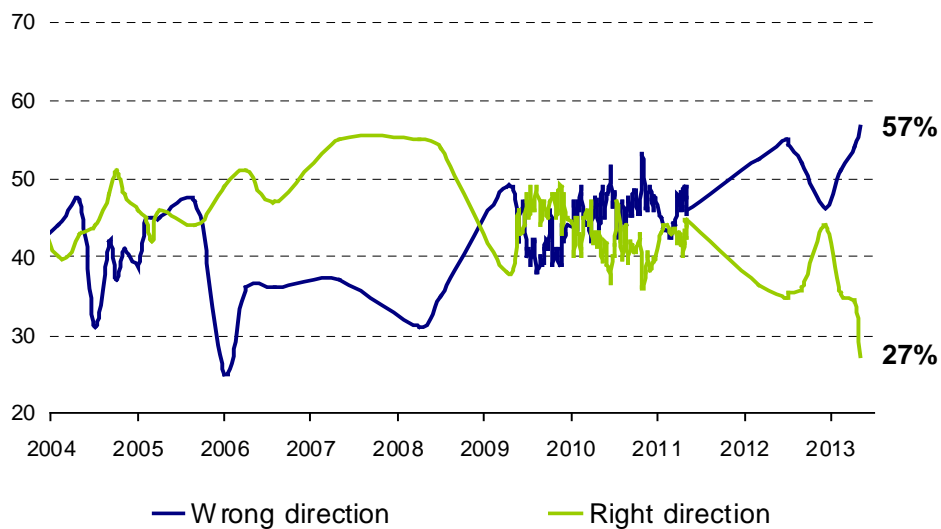


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BASE: Canadians (half-sample); April 30-May 2, 2013 (n=644)

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); April 30-May 2, 2013 (n=665)


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	38.6%	26.2%	23.9%	6.3%	4.2%	0.9%	1179	2.85
REGION								
British Columbia	31.1%	22.2%	29.3%	16.8%	0.0%	0.6%	212	6.73
Alberta	29.3%	42.1%	19.9%	7.5%	0.0%	1.2%	109	9.39
Saskatchewan	28.3%	37.5%	27.4%	3.4%	0.0%	3.4%	33	17.06
Manitoba	38.3%	41.4%	18.1%	2.2%	0.0%	0.0%	39	15.69
Ontario	42.1%	32.5%	19.2%	5.1%	0.0%	1.1%	498	4.39
Quebec	40.2%	8.3%	30.7%	1.6%	18.6%	0.7%	189	7.13
Atlantic Canada	50.0%	18.4%	23.4%	8.1%	0.0%	0.0%	93	10.16
GENDER								
Male	39.0%	30.4%	19.5%	6.6%	3.7%	0.8%	650	3.84
Female	38.2%	21.4%	28.5%	6.1%	4.8%	1.0%	524	4.28
AGE								
<25	43.5%	22.6%	19.6%	10.1%	4.2%	0.0%	31	17.6
25-44	36.1%	18.8%	30.8%	6.7%	5.8%	1.8%	303	5.63
45-64	38.9%	27.1%	22.8%	6.3%	4.2%	0.7%	450	4.62
65+	42.0%	32.6%	19.4%	3.7%	2.2%	0.3%	332	5.38
EDUCATION								
High school or less	37.4%	26.0%	22.1%	7.8%	6.1%	0.7%	245	6.26
College or CEGEP	34.2%	31.9%	22.2%	6.3%	3.4%	2.0%	323	5.45
University or higher	41.6%	23.8%	24.5%	5.9%	4.0%	0.1%	580	4.07
COUNTRY OF BIRTH								
Canada	38.8%	24.9%	24.3%	6.4%	4.7%	1.0%	1007	3.09
Other	36.1%	37.1%	19.7%	6.2%	1.0%	0.0%	161	7.72

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	36.6%	50.1%	13.3%	644	3.9
REGION					
British Columbia	38.8%	53.6%	7.6%	113	9.2
Alberta	39.7%	43.8%	16.5%	53	13.5
Saskatchewan	39.0%	33.5%	27.5%	17	23.8
Manitoba	56.8%	39.0%	4.2%	21	21.4
Ontario	37.9%	49.7%	12.4%	280	5.9
Quebec	32.2%	54.8%	13.0%	98	9.9
Atlantic Canada	27.4%	50.1%	22.5%	61	12.6
GENDER					
Male	38.3%	53.9%	7.8%	358	5.2
Female	34.8%	45.9%	19.3%	282	5.8
AGE					
<25	28.3%	71.7%	0.0%	14	26.2
25-44	32.5%	54.1%	13.4%	174	7.4
45-64	37.7%	46.1%	16.2%	247	6.2
65+	44.7%	42.9%	12.3%	166	7.6
EDUCATION					
High school or less	39.5%	47.8%	12.6%	146	8.1
College or CEGEP	40.4%	39.8%	19.8%	187	7.2
University or higher	33.8%	56.8%	9.3%	295	5.7
COUNTRY OF BIRTH					
Canada	35.7%	51.3%	12.9%	542	4.2
Other	43.8%	40.4%	15.7%	96	10.0
CURRENT VOTE INTENTION					
Conservative Party	28.7%	58.9%	12.4%	237	6.4
NDP	79.2%	10.0%	10.9%	167	7.6
Liberal Party	18.8%	71.7%	9.5%	115	9.1
Green Party	13.4%	76.4%	10.2%	37	16.1
Bloc Quebecois	10.1%	72.1%	17.8%	17	23.8
Other	0.0%	75.7%	24.3%	5	43.8

Direction of Government

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

	Right Direction	Wrong Direction	DK/NR	Sample Size	Margin of Error (+/-)
NATIONALLY	27.3%	56.8%	15.9%	665	3.8
REGION					
British Columbia	24.5%	66.5%	9.0%	115	9.1
Alberta	45.9%	26.2%	27.8%	64	12.3
Saskatchewan	47.5%	49.4%	3.1%	23	20.4
Manitoba	22.5%	59.2%	18.3%	24	20.0
Ontario	31.6%	51.9%	16.4%	267	6.0
Quebec	14.4%	69.4%	16.2%	118	9.0
Atlantic Canada	14.5%	74.2%	11.3%	48	14.1
GENDER					
Male	32.5%	59.1%	8.4%	345	5.3
Female	22.9%	55.0%	22.1%	318	5.5
AGE					
<25	20.7%	51.9%	27.4%	20	21.9
25-44	25.0%	58.7%	16.3%	165	7.6
45-64	29.0%	58.3%	12.8%	256	6.1
65+	31.4%	57.7%	10.9%	192	7.1
EDUCATION					
High school or less	28.5%	49.5%	22.0%	141	8.3
College or CEGEP	26.7%	53.8%	19.5%	175	7.4
University or higher	28.2%	60.5%	11.3%	331	5.4
COUNTRY OF BIRTH					
Canada	25.7%	58.3%	16.0%	572	4.1
Other	41.4%	47.7%	10.9%	84	10.7
CURRENT VOTE INTENTION					
Conservative Party	12.9%	73.7%	13.4%	221	6.6
NDP	83.1%	2.2%	14.7%	170	7.5
Liberal Party	4.7%	83.4%	11.8%	155	7.9
Green Party	3.6%	85.0%	11.4%	33	17.1
Bloc Quebecois	6.1%	77.9%	16.0%	17	23.8
Other	13.7%	62.2%	24.1%	5	43.8

Methodology:

This survey conducted exclusively online using EKOS' unique, hybrid online/telephone research panel, *Probit*. Our panel offers exhaustive coverage of the Canadian population (i.e., Internet, phone, cell phone), random recruitment (in other words, participants are recruited randomly, they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling and are confirmed by live interviewers. Unlike opt-in online panels, *Probit* supports margin of error estimates. We believe this to be the only probability-based online panel in Canada.

The field dates for the this survey are April 30-May 2, 2013. In total, 1,309 Canadians aged 18 and over responded to the survey (including a sub-sample of 1,179 decided voters). The margin of error associated with the total sample is +/-2.7 percentage points, 19 times out of 20. This survey was conducted online.

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.