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COMMENTARY BY FRANK GRAVES

[Ottawa – December 20, 2013] As we examine the past year through the lens of our most recent poll, there are some interesting patterns and conclusions. Few of these will provide much seasonal cheer to the beleaguered Conservative Party. They seem mired at 26 points; a precipitous fall from the majority heights of 2011. Yet, despite a bruising year of problems with issues around ethics and accountability, our rough adjustments for what an election based on those who actually show up would look like shows a three-way dead heat. This sets the stage for the inevitable return to the permanent campaign which should rise in intensity and heat in the coming year. While we will focus on the horserace issues here, this poll is a segue to a much more in-depth survey of where Canadians are on a range of key issues that we will be rolling out in the coming weeks. We will also try and connect this particular polling snapshot with some of the patterns and trends we have seen over the past year, and compared to the last election of 2011.

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 9.5% of respondents are undecided and 2.4% are ineligible to vote.

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

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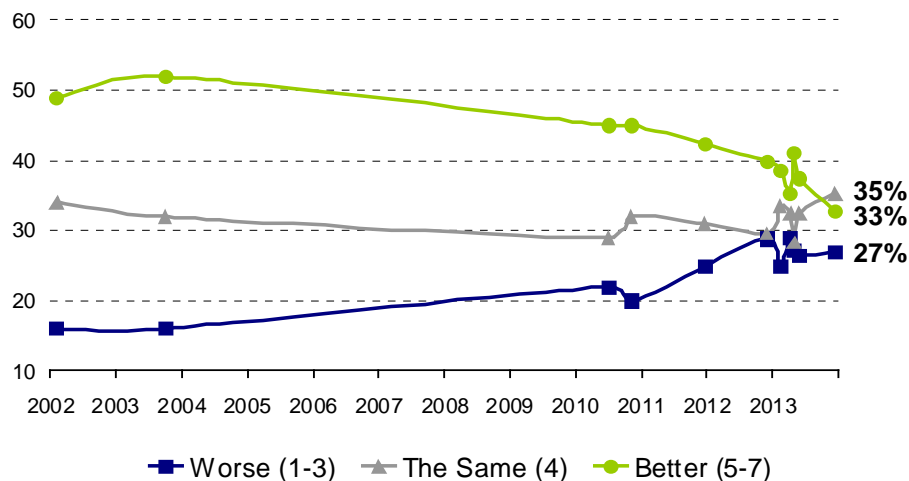
BASE: Canadians; December 12-15, 2013 (n=3,468)

Beginning with the obvious, things are very different now than they were in the aftermath of the last election. The Conservatives have fallen a full 14 points, the NDP have dropped about half as far, and the resurgent Liberal Party has risen from the political grave to nearly double their nadir performance in 2011. Let’s start with the clear loser in this as yet to begin horserace, Stephen Harper’s Conservative Party. The freshly minted majority of 2011 is a nearly unrecognizable husk of the current constituency. Not only have they lost by far the largest portion of the electorate, but most of these defectors have moved to the despised Liberal camp. Mr. Harper’s approval

numbers have hit new lows, confidence in the country and the direction of the federal government have also plumbed record new lows in recent times, and nothing in this poll shows any signs of immediate reversal. The Senate spending scandal, the yet to be completed vetting of the vote suppression scandal, and the emergence of an attractive young Liberal leader, not to mention an increasingly impressive Thomas Mulcair (who doubled his approval ratings over the past year¹), have all coalesced to produce serious problems for Steven Harper's government. Yet even these difficulties may not be the Conservative Party's biggest problem at the moment. Rather, it is the long grind of declining outlook on the medium and longer term economy which weighs most heavily on this government's prospects.

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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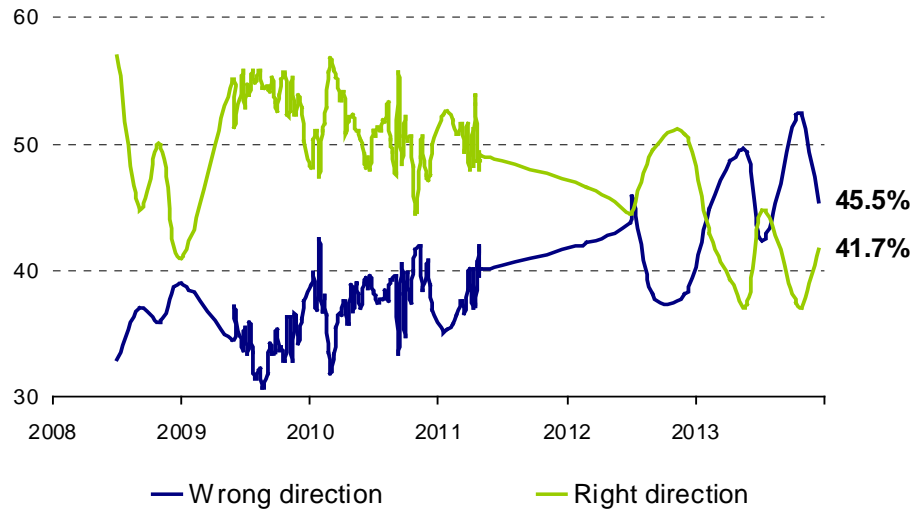
BASE: Canadians (half-sample); December 12-15, 2013 (n=1,735)

The growing conviction that progress may be over, that the middle class is shrinking and falling backward, and that the future only gets worse in the longer term, may all be the deeper forces which will define the next election and its outcome. The Conservatives may claim Canada is up, but the public are increasingly telling us they are down – particularly the nearly three in four who don't count themselves supporters of this government. The reduced constituency for the Conservative Party lives in a jarringly different Canada than the rest of the country. Conservative Canada is thrilled with the direction of the country and the government. They are buoyant about the future and tell us they have done pretty darn well in recent times. Yet even this hasn't prevented the defection of over a third of the party's 2011 supporters who have now joined the majority of Canadians who increasingly pessimistic and perhaps even angry about the direction of the country, the economy, and the federal government.

¹ See "Stephen Harper Plumbing Record Lows on Trust, Direction, and Approval", October 29, 2013. Available online at: <http://goo.gl/BtB3X0>

Direction of country

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

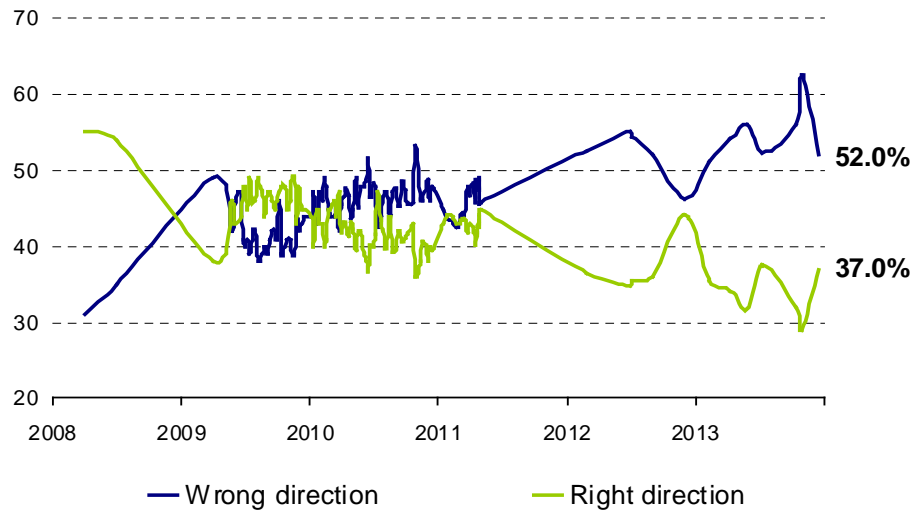


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BASE: Canadians (half-sample); December 12-15, 2013 (n=1,696)

Direction of government

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



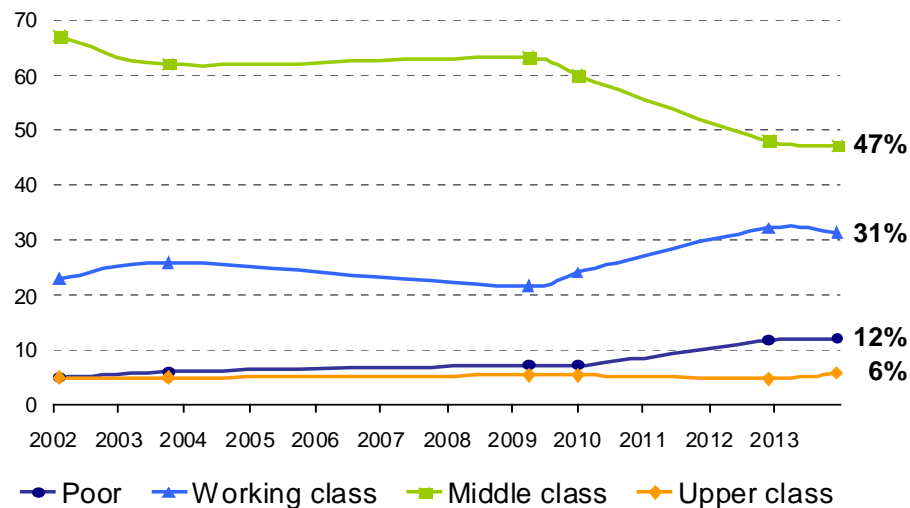
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BASE: Canadians (half-sample); December 12-15, 2013 (n=1,772)

In addition to lowest ever scores on the directional measures and the lowest ever scores for trust in government and health of democracy², we are seeing the lowest ever score for those who locate themselves in the middle class. Mirroring a similar (perhaps even steeper) decline in America³, only 47 per cent now consider themselves members of the middle class, down from two-thirds when Mr. Harper took office. The shifts are all downward to the burgeoning working classes and the poor. The longer term outlook on the future is even darker. The crisis of the middle class, and the rising privilege at the top while most stagnate or fall back has become the most important issue of the day. How the parties confront this defining issue will be the decisive factor in shaping the outcome of Election 42.

Tracking self-rated social class: Canada

Q. Would you describe you and your household as poor, working class, middle class, or upper class?



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BASE: Canadians; December 12-15, 2013 (n=3,468)

So far, no party has shown any evidence that they can 'solve' this master issue and this may be why the likely voter projections show a virtual deadlock (probably reflecting a "none of the above" mentality, which may explain the recent rise in Green Party support).

Beyond this issue, what else can we glean from this recent poll and our past year of polling? Justin Trudeau and the Liberals are the clear winners of the past year, but there is no prize that comes with this; that awaits election day, still a long way away (not to discount the formidable achievement of nearly doubling party support and taking the party from a near-death experience to a pretty stable lead over the past several months). The party is re-establishing the center of the spectrum and its growth has come from an almost perfectly balanced stream of voters from

² See "Looking Backward, Looking Forward", January 9, 2013. Available online at: <http://goo.gl/EQ7qIt>

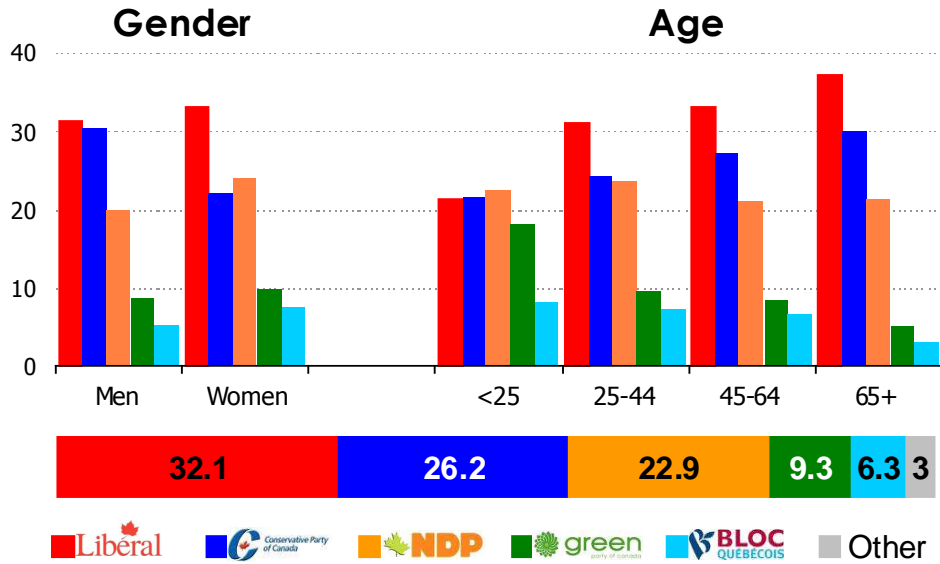
³ See "The NAFTA Promise and the North American Reality", October 31, 2013. Available online at: <http://goo.gl/en4qZ8>



both the right and the left (with an equal measure of returning disaffected Liberals who sat out the last election).

Vote intention by gender and age

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

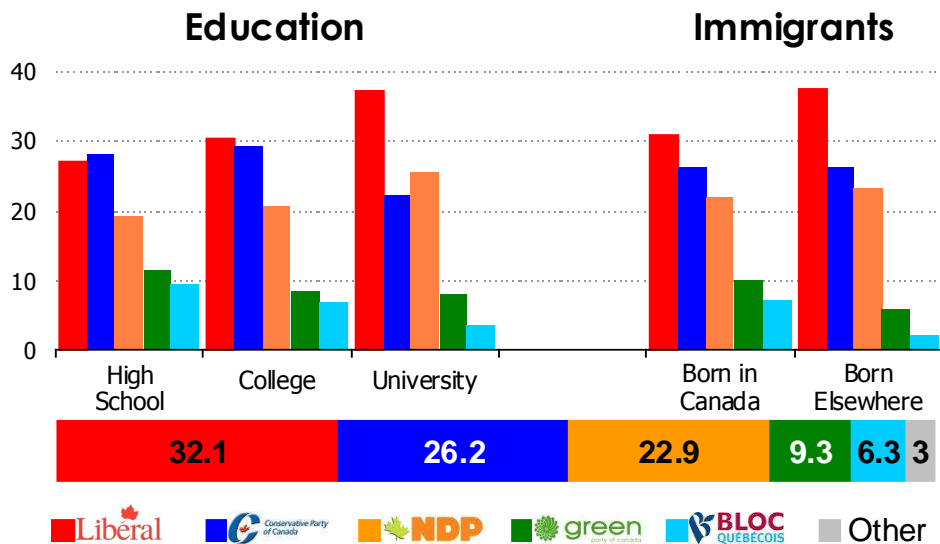


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BASE: Canadians; December 12-15, 2013 (n=3,468)

Vote intention by education/country of birth

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



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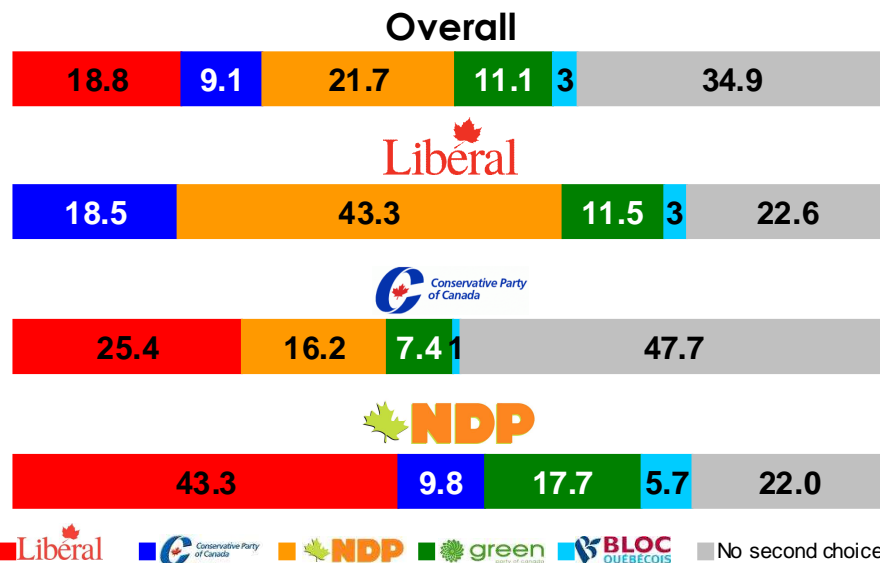
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The new Liberal constituency is also notable. Although Justin Trudeau may be the poster child for youthful optimism, his real strengths lie with grey Canada where he now has a large lead. This may not be the brand image being sought but aging boomers and seniors have two huge political pluses going for them. They are the largest cohorts in the electorate and they nearly all vote. Mr. Trudeau's Liberals have also recaptured the new Canadian vote (at least temporarily) and have a larger lead there than with the Canadian born. The "big shift" may be stuttering for the time being.

The NDP have been humbled numerically from their astonishing breakthrough in 2011, but this diminution is relatively half as much as the Conservative attrition. Their leader is doing much better and they have a good opportunity to capture support on the declining middle and rising über rich fronts. Moreover, it should be noted that there is a large cohort of centre left voters who will move easily from Liberal to NDP depending on who is seen as the more plausible bet to depose Mr. Harper. We have seen just such volatility in these ranks over the past couple of years and this cohort could swing back to Mr. Mulcair again. In fact, it is Stephen Harper who, according to second choice statistics, has the least opportunity to grow.

Second choice

Q. What party would be your second choice?



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BASE: Decided voters; December 12-15, 2013 (n=2,956)

The stage is now set for an almost unprecedented contest across three almost equally poised parties. The contest will be for the hearts and minds of the beleaguered middle class and perhaps the newly swollen ranks of working class and poor, who are now almost equally sized fraction of the electorate for the first time in modern history. The prospects of a tie raise the spectre of a coalition government (scary only to the parties, not the voters). Expect clear denunciations of the possibility and value of such arrangements from all party leaders, but if

current trends continue, expect to hear a lot more about the dreaded C-word as this race develops.