

## ***POLITICAL LANDSCAPE SHOWS A 7.5 POINT CONSERVATIVE LEAD***

*PLATFORMS CITED AS MOST IMPORTANT FACTOR IN ULTIMATE VOTE DECISION*

[Ottawa – January 27, 2011] – The frozen political landscape appears almost totally inert. The Conservatives enjoy a mildly comfortable 7.5 point lead, but everything looks more or less as it did two weeks ago. These results are somewhat better for the Conservatives than in the late fall, but the outcome of an apparently looming election is very much in doubt. The public as forecasters say they lean to a Conservative result of the minority variety.

Of some interest given the pre-campaign positioning of the parties are questions on national and federal approval levels. Somewhat ironically, as the Liberals are asking voters to assess whether they are better or worse off, Canadians are showing a moderate recovery of confidence in both national and federal government direction. It is also interesting to note that most voters want an election this year but that the group agitating for an immediate electoral showdown has shrunk slightly while the sabre rattling has increased.

The other striking feature of the poll is that it is Conservative voters who are by far the most leery of an election. This is actually an interesting position because these same supporters are predicting a CPC majority. Their conviction level on that must be fairly soft; they may feel better to continue to govern when the real prospects are something similar to the current Parliament with a risk of something less Conservative friendly. This is speculative but would be a pretty rational risk management perspective.

What is clearer is something that isn't a major part of the election talk. While leadership and

### **HIGHLIGHTS**

- **National federal vote intention:**
  - 35.4% CPC
  - 27.9% LPC
  - 14.8% NDP
  - 9.8% Green
  - 9.7% BQ
  - 2.5% other
  
- **Direction of country:**
  - 52.6% right direction
  - 35.4% wrong direction
  
- **Direction of government:**
  - 44.2% right direction
  - 43.6% wrong direction
  
- **Preferred election outcome:**
  - 17% minority Liberal
  - 20% majority Liberal
  - 13% minority Conservative
  - 28% majority Conservative
  
- **Timing of next election:**
  - 14% as soon as possible
  - 17% next four months
  - 22% by the end of 2011
  - 40% not until 2012
  
- **Most important factor:**
  - 44% party platform
  - 20% party leader
  - 17% local candidate
  
- **Support for coalition government:**
  - 41% Conservative government
  - 39% coalition government

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

Clearly the entrenched nature of these numbers would suggest that the result of an election would produce something like the current Parliament. But it really makes little sense to speculate at this stage as the key ingredient of voter decision making isn't on the table. Moreover, there is a lot of churn going on outside of the secure Conservative base. Many women voters are moving around and Ontario remains quite tight.

Perhaps the ultimate demographic factor will be age and generation. The Conservatives are increasing their hegemony with the older voter (almost half of seniors are voting Conservative now). On the other hand, the cohorts trailing the seniors and the baby boomers are clearly not as attracted to the Conservatives. It doesn't appear that the older vote is poised to move so for opposition parties to do better, and for the Liberals to have a chance to win, they must develop a stronger connection with the available Gen X, GenY, and millennial cohorts. Similarly, if the Conservatives could strengthen their support with these groups, this could well provide them with necessary margin for a majority government. In any case, with these numbers, it is unlikely that the Liberals will be able to prevent another Conservative government.

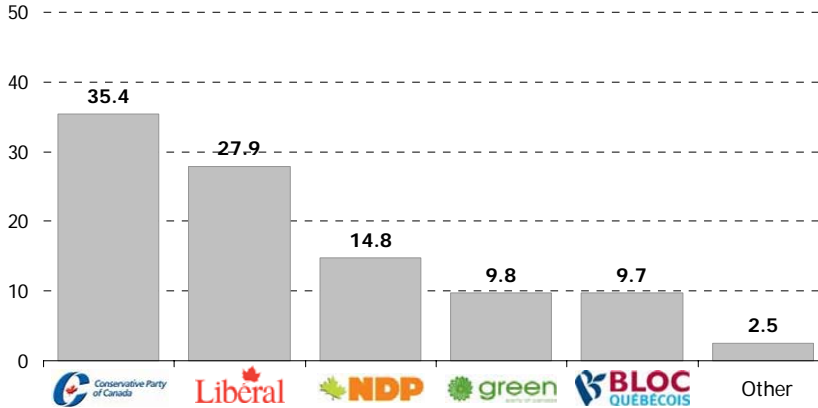
### Methodological Footnote:

As part of an open source approach to strengthening the quality of polling, we are appending a recent industry presentation that we gave on our IVR methodology. It is our view that there are exciting and effective ways of confronting the challenge of producing scientifically representative sampling in an era of declining response rates and rising rates of households with no land lines. What remains true is that sound survey research still demands that the entire population (on and off line, cell only and land line) are reachable, and that the process for selecting respondents is random invitation (rather than self selection). While there are no perfect methodologies, we believe the approach we are using is as good as or better than the other probability based polling methods currently on the scene.

## Top Line Results:

### Federal vote intention: January 13-26

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



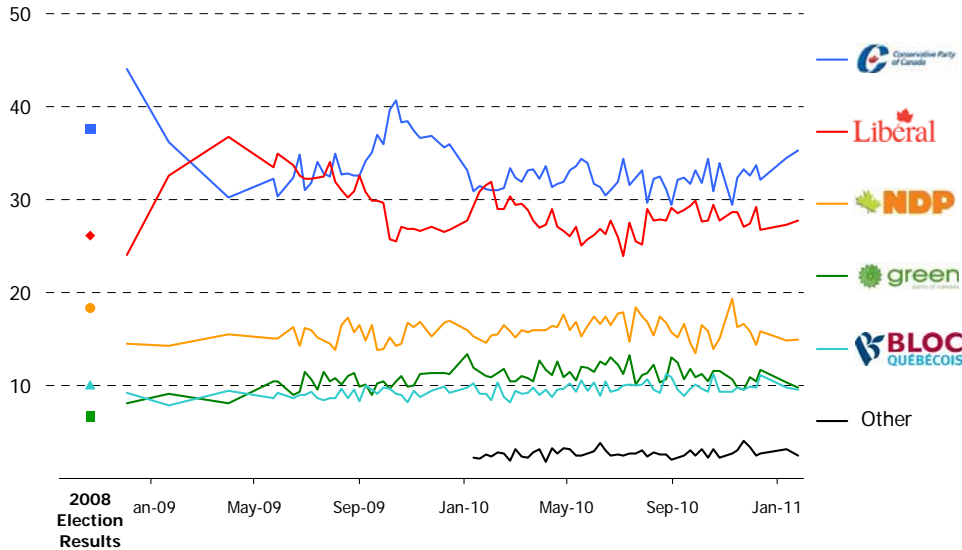
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 15.0% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; January 13-26, 2011 (n=3,966)

### Weekly tracking of federal vote intention

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



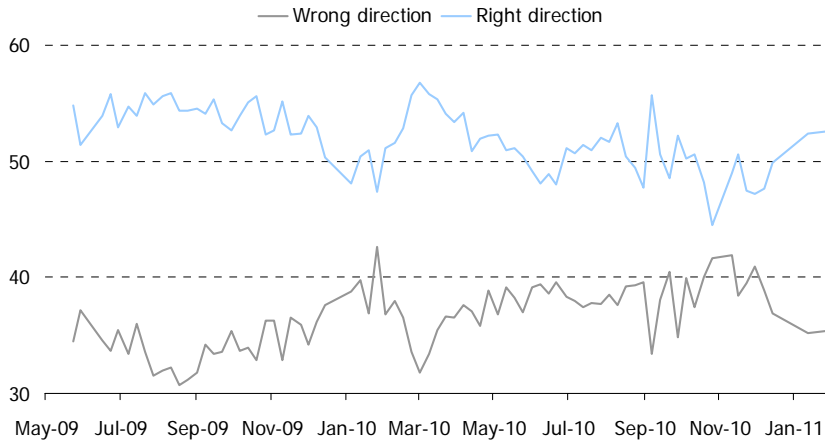
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 15.0% of Canadians are undecided/ineligible to vote.

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BASE: Decided voters; most recent data point January 13-26, 2011 (n=3,966)

## Direction of country

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

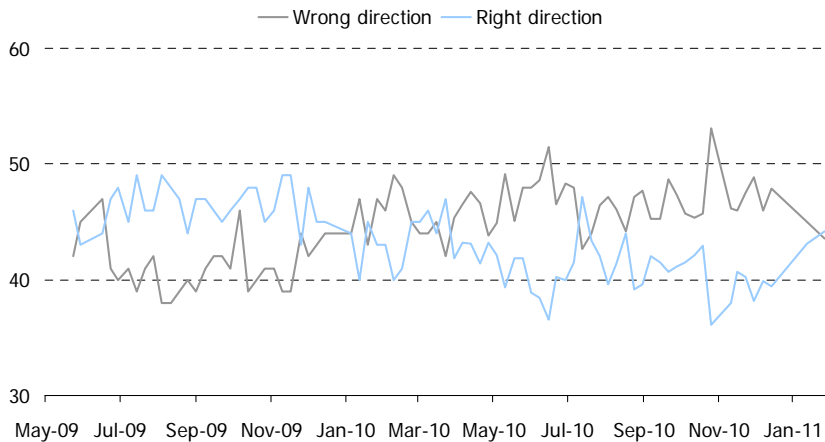


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BASE: Canadians; most recent data point January 13-26, 2011 (n=half sample)

## Direction of government

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

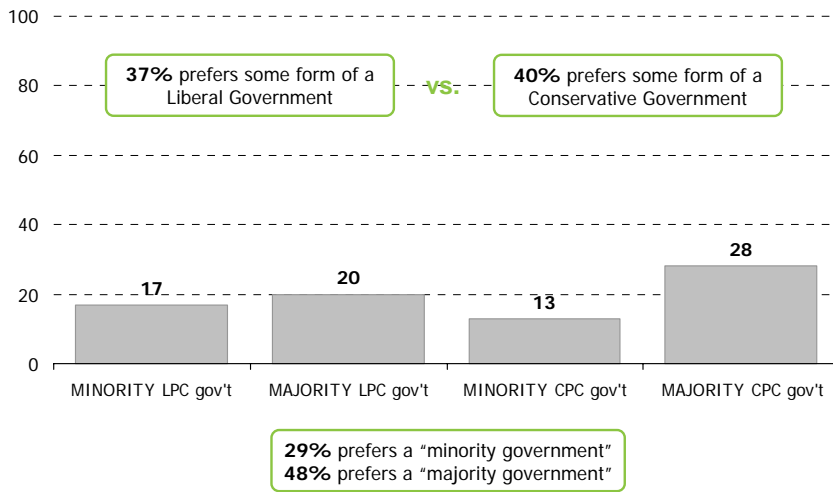


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BASE: Canadians; most recent data point January 13-26, 2011 (n=half sample)

## Preferred outcome for next election

Q. Which of the following potential outcomes of the next federal election do you think would be BEST?

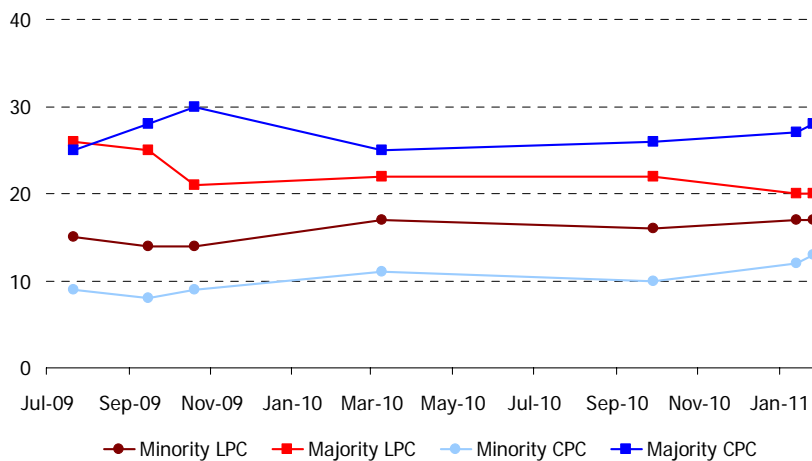


NOTE: There is also 23% that "prefers none of the above" options  
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BASE: Eligible voters; January 13-26, 2011 (n=4,482)

## Tracking preferred election outcome

Q. Which of the following potential outcomes of the next federal election do you think would be BEST?

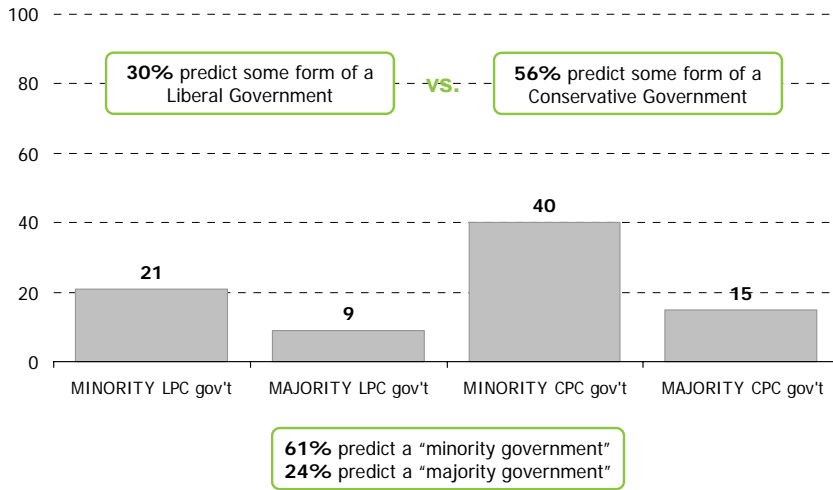


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BASE: Eligible voters; most recent data point January 13-26, 2011 (n=4,482)

## Most likely outcome for next election

Q. Putting aside your personal voting intentions, which of the following do you think will be the most likely outcome of the next federal election?



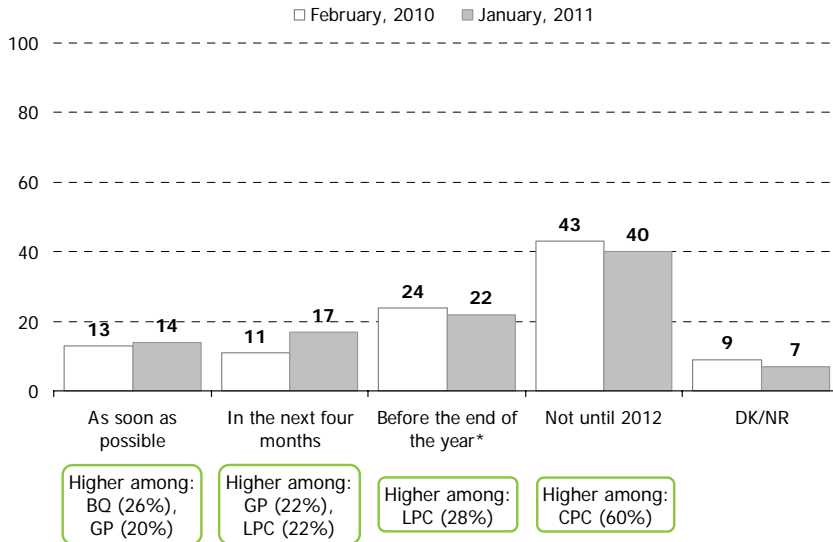
NOTE: There is also 15% that selected "none of these" options

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BASE: Eligible voters; January 13-26, 2011 (n=4,482)

## Preferred timing of next election

Q. If you could choose, when would you want the next federal election to be held: 1) as soon as possible; 2) in the next four months; 3) before the end of 2011; or 4) not until the 4 year term ends in 2012?



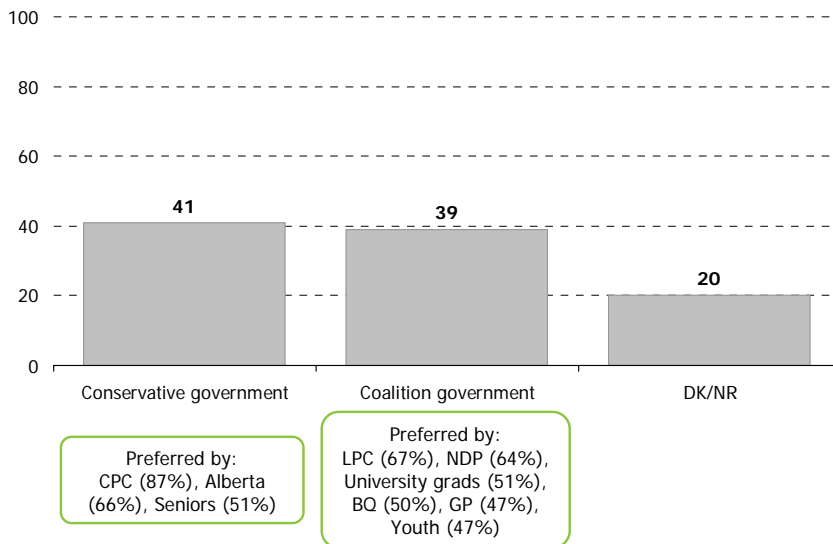
\*In February 2010, this option was worded "Before the end of 2010". In January 2011, it was worded "Before the end of 2011".

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BASE: Eligible voters; most recent data point January 13-26, 2011 (n=4,482)

## Support for coalition government

Q. If you were forced to choose between a Conservative government led by Stephen Harper and a coalition government made up of Liberal and New Democrat and led by Liberal leader Michael Ignatieff, which would you prefer?

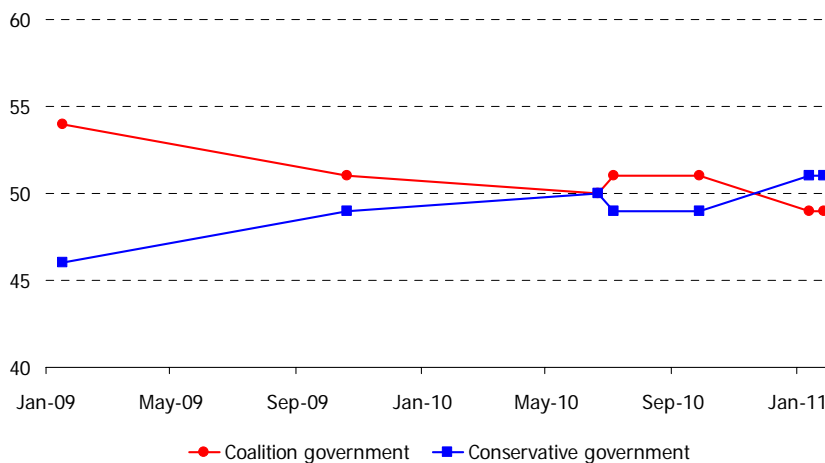


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BASE: Eligible voters; most recent data point January 13-26, 2011 (n=4,482)

## Tracking support for coalition government

Q. If you were forced to choose between a Conservative government led by Stephen Harper and a coalition government made up of Liberals and New Democrats and led by Liberal leader Michael Ignatieff, which would you prefer?



NOTE: The earliest tracking point (January 2009) was administered by live interviewer. It had much lower non-response than when the survey was administered by answering an automated voice on one's touchpad. We can compare them by comparing only those who gave a valid response on the two surveys. This provides a useful comparison but changes the numbers for the more recent data as the non-response is treated as missing values and excluded.

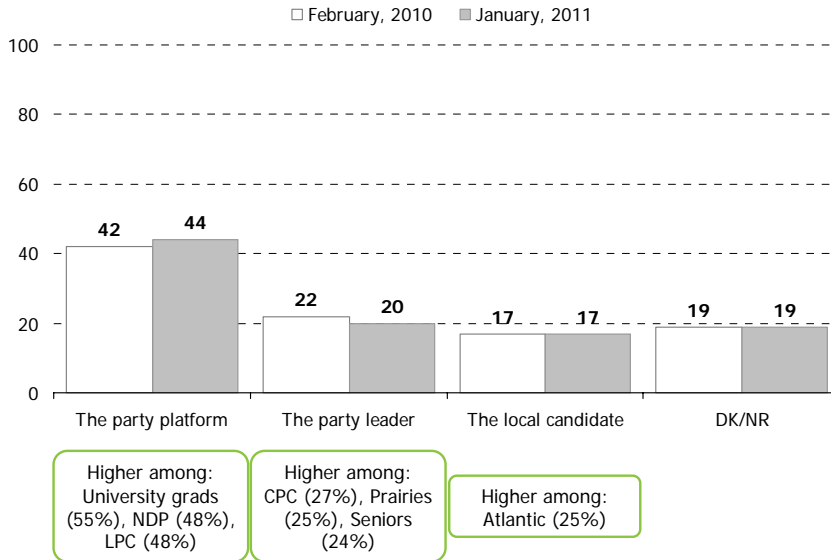
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BASE: Eligible voters; most recent data point January 13-26, 2011 (n=4,482)



## Most important factor in determining which party to support






Q. Which of the following is the most important factor for you when it comes to determining which party you will vote for in the next federal election?



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BASE: Eligible voters; most recent data point January 13-26, 2011 (n=4,482)

## Detailed Tables:

<b>National Federal Vote Intention</b>								
<i>Q. If a federal election were held tomorrow, which party would you vote for?</i>								
						Other	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>35.4%</b>	<b>27.9%</b>	<b>14.8%</b>	<b>9.8%</b>	<b>9.7%</b>	<b>2.5%</b>	<b>3966</b>	<b>1.6</b>
<b>REGION</b>								
British Columbia	37.8%	23.5%	18.9%	16.7%	0.0%	3.1%	357	5.2
Alberta	59.0%	20.3%	10.5%	8.1%	0.0%	2.1%	377	5.1
Saskatchewan/Manitoba	48.1%	23.4%	19.7%	7.1%	0.0%	1.8%	250	6.2
Ontario	37.5%	34.3%	15.1%	10.5%	0.0%	2.6%	1408	2.6
Quebec	18.0%	22.4%	11.4%	6.7%	38.8%	2.7%	1275	2.7
Atlantic Canada	34.4%	36.0%	19.8%	8.9%	0.0%	0.9%	299	5.7
<b>GENDER</b>								
Male	39.3%	27.2%	12.3%	9.6%	9.2%	2.4%	2023	2.2
Female	31.5%	28.6%	17.4%	10.0%	10.1%	2.5%	1943	2.2
<b>AGE</b>								
<25	18.1%	30.0%	20.7%	17.5%	10.7%	3.0%	250	6.2
25-44	31.5%	27.5%	16.3%	10.8%	11.4%	2.5%	1262	2.8
45-64	37.5%	27.0%	13.9%	8.9%	10.0%	2.8%	1697	2.4
65+	48.7%	29.3%	10.5%	5.1%	4.9%	1.4%	757	3.6
<b>EDUCATION</b>								
High school or less	37.8%	22.1%	15.6%	8.7%	12.6%	3.1%	1117	2.9
College or CEGEP	38.1%	25.4%	13.4%	10.7%	10.1%	2.3%	1277	2.7
University or higher	31.7%	33.4%	15.5%	9.8%	7.4%	2.2%	1572	2.5
<b>METROPOLITAN CANADA</b>								
Vancouver	49.2%	17.9%	14.9%	15.3%	0.0%	2.7%	100	9.8
Calgary	55.7%	26.5%	5.3%	9.9%	0.0%	2.6%	113	9.2
Toronto	37.4%	38.2%	12.8%	9.0%	0.0%	2.6%	379	5.0
Ottawa	47.3%	32.4%	12.3%	6.1%	0.0%	1.9%	174	7.4
Montreal	15.0%	22.7%	11.9%	6.5%	41.0%	2.9%	428	4.7





### **Federal Vote Intention – British Columbia**

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

					Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>37.8%</b>	<b>23.5%</b>	<b>18.9%</b>	<b>16.7%</b>	<b>3.1%</b>	<b>357</b>	<b>5.2</b>
<b>GENDER</b>							
Male	39.6%	25.8%	15.1%	16.8%	2.7%	187	7.2
Female	33.3%	21.7%	24.1%	17.2%	3.7%	170	7.5
<b>AGE</b>							
<25	10.9%	29.9%	26.9%	32.2%	0.0%	23	20.4
25-44	27.3%	26.8%	25.7%	16.9%	3.2%	100	9.8
45-64	39.1%	21.8%	16.7%	16.8%	5.6%	154	7.9
65+	63.6%	17.5%	9.5%	9.4%	0.0%	80	11.0
<b>EDUCATION</b>							
High school or less	39.6%	13.0%	24.0%	20.2%	3.2%	83	10.8
College or CEGEP	39.2%	25.9%	16.6%	14.7%	3.6%	116	9.1
University or higher	32.9%	27.0%	20.0%	17.2%	2.9%	158	7.8





### **Federal Vote Intention – Alberta**

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

					Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>59.0%</b>	<b>20.3%</b>	<b>10.5%</b>	<b>8.1%</b>	<b>2.1%</b>	<b>377</b>	<b>5.1</b>
<b>GENDER</b>							
Male	56.4%	23.6%	6.4%	11.4%	2.3%	182	7.3
Female	61.2%	16.4%	15.0%	5.2%	2.2%	195	7.0
<b>AGE</b>							
<25	40.9%	9.3%	40.5%	4.6%	4.8%	15	25.3
25-44	54.3%	25.8%	10.1%	8.6%	1.2%	136	8.4
45-64	65.2%	17.8%	5.4%	9.1%	2.4%	153	7.9
65+	64.4%	17.8%	7.7%	7.5%	2.6%	73	11.5
<b>EDUCATION</b>							
High school or less	66.1%	12.5%	15.0%	2.7%	3.6%	86	10.6
College or CEGEP	67.1%	9.4%	10.3%	12.4%	0.7%	113	9.2
University or higher	49.3%	31.0%	8.8%	8.4%	2.5%	178	7.4





### **Federal Vote Intention – Saskatchewan/Manitoba**

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

					Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>48.1%</b>	<b>23.4%</b>	<b>19.7%</b>	<b>7.1%</b>	<b>1.8%</b>	<b>250</b>	<b>6.2</b>
<b>GENDER</b>							
Male	49.4%	20.6%	16.1%	11.0%	2.9%	136	8.4
Female	44.9%	24.0%	25.2%	5.4%	0.5%	114	9.2
<b>AGE</b>							
<25	33.1%	16.2%	28.6%	22.1%	0.0%	11	29.6
25-44	41.0%	23.4%	21.7%	11.2%	2.7%	66	12.1
45-64	51.4%	24.1%	17.5%	5.6%	1.4%	124	8.8
65+	59.8%	19.7%	18.7%	0.0%	1.7%	49	14.0
<b>EDUCATION</b>							
High school or less	52.5%	15.3%	23.3%	5.2%	3.8%	78	11.1
College or CEGEP	48.4%	24.9%	13.8%	11.5%	1.5%	81	10.9
University or higher	42.7%	24.9%	23.6%	8.1%	0.6%	91	10.3






### **Federal Vote Intention – Ontario**

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

					Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>37.5%</b>	<b>34.3%</b>	<b>15.1%</b>	<b>10.5%</b>	<b>2.6%</b>	<b>1408</b>	<b>2.6</b>
<b>GENDER</b>							
Male	41.5%	32.2%	13.1%	10.4%	2.8%	745	3.6
Female	32.5%	36.5%	17.6%	10.9%	2.4%	663	3.8
<b>AGE</b>							
<25	15.8%	34.3%	21.8%	23.1%	5.1%	90	10.3
25-44	34.7%	33.1%	16.4%	13.0%	2.8%	433	4.7
45-64	40.5%	34.1%	14.1%	8.5%	2.7%	592	4.0
65+	46.5%	37.5%	12.1%	3.3%	0.5%	293	5.7
<b>EDUCATION</b>							
High school or less	40.0%	27.1%	19.7%	10.1%	3.2%	350	5.2
College or CEGEP	40.0%	30.6%	14.3%	12.3%	2.8%	435	4.7
University or higher	33.2%	41.0%	13.7%	9.9%	2.1%	623	3.9





### **Federal Vote Intention – Quebec**

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

						Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>18.0%</b>	<b>22.4%</b>	<b>11.4%</b>	<b>6.7%</b>	<b>38.8%</b>	<b>2.7%</b>	<b>1275</b>	<b>2.7</b>
<b>GENDER</b>								
Male	24.1%	19.6%	10.7%	4.7%	38.6%	2.3%	612	4.0
Female	13.2%	25.3%	11.9%	8.4%	38.1%	3.2%	663	3.8
<b>AGE</b>								
<25	14.9%	32.2%	10.1%	6.0%	34.9%	2.0%	90	10.3
25-44	18.1%	18.3%	12.2%	7.3%	41.3%	2.8%	444	4.7
45-64	16.2%	19.8%	12.3%	6.5%	42.9%	2.4%	534	4.2
65+	26.8%	30.5%	8.1%	5.5%	25.4%	3.7%	207	6.8
<b>EDUCATION</b>								
High school or less	18.9%	19.6%	8.2%	5.6%	43.6%	4.2%	416	4.8
College or CEGEP	18.6%	23.1%	11.7%	7.5%	36.9%	2.3%	430	4.7
University or higher	18.4%	24.5%	13.6%	6.6%	35.1%	1.8%	429	4.7

### **Federal Vote Intention – Atlantic Canada**

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

					Other	Sample Size	Margin of Error (+/-)
<b>OVERALL</b>	<b>34.4%</b>	<b>36.0%</b>	<b>19.8%</b>	<b>8.9%</b>	<b>0.9%</b>	<b>299</b>	<b>5.7</b>
<b>GENDER</b>							
Male	40.1%	38.2%	13.8%	7.2%	0.7%	161	7.7
Female	29.5%	33.5%	25.4%	10.4%	1.2%	138	8.3
<b>AGE</b>							
<25	23.9%	26.6%	24.3%	22.1%	3.0%	21	21.4
25-44	29.0%	39.8%	23.7%	7.5%	0.0%	83	10.8
45-64	35.4%	37.0%	19.7%	7.3%	0.7%	140	8.3
65+	52.8%	32.6%	7.3%	5.4%	1.9%	55	13.2
<b>EDUCATION</b>							
High school or less	44.2%	35.1%	12.2%	8.6%	0.0%	104	9.6
College or CEGEP	44.0%	30.9%	17.7%	7.4%	0.0%	102	9.7
University or higher	18.8%	41.1%	27.5%	10.0%	2.6%	93	10.2

### **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 (+/-)
<b>NATIONALLY</b>	<b>52.6%</b>	<b>35.4%</b>	<b>11.9%</b>	<b>2311</b>	<b>2.0</b>
<b>REGION</b>					
British Columbia	54.4%	32.6%	12.9%	225	6.5
Alberta	62.3%	24.9%	12.8%	206	6.8
Saskatchewan/Manitoba	64.2%	23.8%	12.0%	143	8.2
Ontario	55.2%	33.6%	11.3%	799	3.5
Quebec	43.0%	46.9%	10.0%	752	3.6
Atlantic Canada	46.0%	36.0%	18.0%	186	7.2
<b>GENDER</b>					
Male	56.5%	34.0%	9.5%	1148	2.9
Female	49.1%	36.8%	14.1%	1163	2.9
<b>AGE</b>					
<25	48.4%	32.9%	18.7%	165	7.6
25-44	52.0%	39.0%	9.0%	747	3.6
45-64	51.2%	37.5%	11.3%	971	3.1
65+	59.9%	25.9%	14.2%	428	4.7
<b>EDUCATION</b>					
High school or less	52.8%	32.1%	15.1%	659	3.8
College or CEGEP	58.5%	30.0%	11.5%	771	3.5
University or higher	47.9%	42.0%	10.1%	881	3.3
<b>CURRENT VOTE INTENTION</b>					
Conservative Party of Canada	80.8%	11.8%	7.4%	672	3.8
Liberal Party of Canada	43.5%	44.8%	11.6%	522	4.3
NDP	36.3%	49.1%	14.6%	277	5.9
Green Party	40.2%	47.8%	12.0%	186	7.2
Bloc Quebecois	33.9%	57.8%	8.3%	265	6.0
Undecided	21.3%	61.3%	17.4%	49	14.0

### **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 (+/-)
<b>NATIONALLY</b>	<b>44.2%</b>	<b>43.6%</b>	<b>12.2%</b>	<b>2311</b>	<b>2.0</b>
<b>REGION</b>					
British Columbia	44.1%	42.6%	13.3%	187	7.2
Alberta	60.4%	25.2%	14.4%	221	6.6
Saskatchewan/Manitoba	60.2%	23.6%	16.2%	154	7.9
Ontario	45.3%	42.7%	12.0%	834	3.4
Quebec	31.3%	58.3%	10.4%	724	3.6
Atlantic Canada	44.3%	44.3%	11.3%	191	7.1
<b>GENDER</b>					
Male	47.2%	43.6%	9.3%	1145	2.9
Female	41.4%	43.6%	15.0%	1166	2.9
<b>AGE</b>					
<25	39.9%	42.0%	18.0%	159	7.8
25-44	42.7%	46.9%	10.4%	731	3.6
45-64	44.1%	44.6%	11.4%	985	3.1
65+	50.2%	35.9%	13.8%	436	4.7
<b>EDUCATION</b>					
High school or less	43.3%	40.6%	16.2%	705	3.7
College or CEGEP	45.5%	42.8%	11.7%	722	3.7
University or higher	43.8%	46.5%	9.7%	884	3.3
<b>CURRENT VOTE INTENTION</b>					
Conservative Party of Canada	80.5%	11.0%	8.6%	734	3.6
Liberal Party of Canada	28.9%	61.4%	9.7%	528	4.3
NDP	21.7%	65.7%	12.6%	275	5.9
Green Party	22.6%	64.2%	13.3%	172	7.5
Bloc Quebecois	20.8%	71.9%	7.3%	238	6.4
Undecided	32.0%	62.0%	6.0%	48	14.1

## Preferred Election Outcome

Q. Which of the following potential outcomes of the next federal election do you think would be BEST?

	Minority LPC gov't.	Majority LPC gov't	Minority CPC gov't	Majority CPC gov't	None of these	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>17%</b>	<b>20%</b>	<b>12%</b>	<b>28%</b>	<b>23%</b>	<b>4482</b>	<b>1.5</b>
<b>REGION</b>							
British Columbia	16%	16%	15%	28%	25%	396	4.9
Alberta	11%	12%	13%	52%	13%	421	4.8
Saskatchewan/Manitoba	15%	19%	9%	39%	19%	291	5.7
Ontario	18%	23%	12%	28%	18%	1576	2.5
Quebec	17%	20%	13%	16%	34%	1434	2.6
Atlantic Canada	20%	22%	9%	27%	23%	364	5.1
<b>GENDER</b>							
Male	18%	20%	13%	31%	18%	2220	2.1
Female	15%	20%	12%	25%	27%	2262	2.1
<b>AGE</b>							
<25	21%	20%	14%	16%	29%	279	5.9
25-44	16%	21%	13%	26%	24%	1432	2.6
45-64	17%	19%	11%	29%	24%	1923	2.2
65+	14%	20%	12%	40%	15%	848	3.4
<b>EDUCATION</b>							
High school or less	14%	16%	14%	29%	28%	1301	2.7
College or CEGEP	14%	18%	14%	30%	24%	1459	2.6
University or higher	20%	25%	10%	26%	19%	1722	2.4
<b>CURRENT VOTE INTENTION</b>							
Conservative Party of Canada	4%	4%	18%	70%	4%	1406	2.6
Liberal Party of Canada	29%	53%	7%	6%	6%	1050	3.0
NDP	24%	15%	10%	12%	39%	552	4.2
Green Party	22%	14%	13%	10%	41%	358	5.2
Bloc Quebecois	22%	12%	14%	9%	44%	503	4.4
Undecided	12%	12%	12%	15%	48%	97	10.0



### **Most Likely Election Outcome**

*Q. Putting aside your personal voting intentions, which of the following do you think will be the most likely outcome of the next federal election?*

	Minority LPC gov't.	Majority LPC gov't	Minority CPC gov't	Majority CPC gov't	None of these	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>21%</b>	<b>8%</b>	<b>41%</b>	<b>16%</b>	<b>15%</b>	<b>4482</b>	<b>1.5</b>
<b>REGION</b>							
British Columbia	19%	7%	41%	16%	17%	396	4.9
Alberta	14%	4%	49%	19%	15%	421	4.8
Saskatchewan/Manitoba	14%	10%	38%	23%	14%	291	5.7
Ontario	21%	9%	43%	16%	11%	1576	2.5
Quebec	27%	10%	33%	12%	18%	1434	2.6
Atlantic Canada	21%	8%	42%	14%	15%	364	5.1
<b>GENDER</b>							
Male	20%	8%	45%	17%	11%	2220	2.1
Female	22%	9%	36%	14%	18%	2262	2.1
<b>AGE</b>							
<25	27%	13%	30%	11%	19%	279	5.9
25-44	21%	9%	41%	14%	14%	1432	2.6
45-64	22%	7%	43%	15%	14%	1923	2.2
65+	14%	7%	42%	23%	14%	848	3.4
<b>EDUCATION</b>							
High school or less	18%	11%	33%	18%	20%	1301	2.7
College or CEGEP	21%	10%	38%	16%	15%	1459	2.6
University or higher	22%	6%	48%	14%	11%	1722	2.4
<b>CURRENT VOTE INTENTION</b>							
Conservative Party of Canada	9%	4%	50%	30%	6%	1406	2.6
Liberal Party of Canada	31%	13%	41%	7%	8%	1050	3.0
NDP	28%	8%	37%	13%	14%	552	4.2
Green Party	26%	11%	36%	8%	19%	358	5.2
Bloc Quebecois	28%	9%	35%	9%	19%	503	4.4
Undecided	15%	8%	33%	10%	33%	97	10.0

### **Preferred Timing of Next Election**

*Q. If you could choose, when would you want the next federal election to be held?*

	As soon as possible	In the next 4 months	Before the end of 2011	Not until 2012	DK/NR	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>14%</b>	<b>16%</b>	<b>22%</b>	<b>40%</b>	<b>7%</b>	<b>4482</b>	<b>1.5</b>
<b>REGION</b>							
British Columbia	12%	22%	22%	39%	6%	396	4.9
Alberta	11%	10%	19%	54%	7%	421	4.8
Saskatchewan/Manitoba	8%	16%	19%	51%	7%	291	5.7
Ontario	11%	15%	24%	43%	6%	1576	2.5
Quebec	21%	20%	21%	29%	9%	1434	2.6
Atlantic Canada	18%	13%	24%	34%	11%	364	5.1
<b>GENDER</b>							
Male	16%	17%	22%	40%	5%	2220	2.1
Female	12%	16%	23%	40%	9%	2262	2.1
<b>AGE</b>							
<25	26%	22%	21%	23%	8%	279	5.9
25-44	16%	17%	21%	38%	8%	1432	2.6
45-64	12%	15%	23%	45%	6%	1923	2.2
65+	6%	16%	24%	45%	8%	848	3.4
<b>EDUCATION</b>							
High school or less	17%	16%	21%	37%	9%	1301	2.7
College or CEGEP	12%	17%	22%	42%	7%	1459	2.6
University or higher	13%	16%	24%	41%	7%	1722	2.4
<b>CURRENT VOTE INTENTION</b>							
Conservative Party of Canada	7%	10%	18%	60%	4%	1406	2.6
Liberal Party of Canada	15%	21%	28%	30%	5%	1050	3.0
NDP	18%	21%	24%	29%	7%	552	4.2
Green Party	20%	22%	23%	29%	6%	358	5.2
Bloc Quebecois	26%	20%	23%	25%	6%	503	4.4
Undecided	22%	20%	18%	27%	13%	97	10.0

### **Most Important Factor in Supporting a Party**

*Q. Which of the following is the most important factor for you when it comes to determining which party you will vote for in the next federal election?*

	The party leader	The local candidate	The party platform	None of these	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>20%</b>	<b>17%</b>	<b>44%</b>	<b>19%</b>	<b>4482</b>	<b>1.5</b>
<b>REGION</b>						
British Columbia	20%	18%	48%	14%	396	4.9
Alberta	18%	15%	46%	21%	421	4.8
Saskatchewan/Manitoba	25%	15%	40%	20%	291	5.7
Ontario	20%	16%	45%	18%	1576	2.5
Quebec	20%	16%	41%	23%	1434	2.6
Atlantic Canada	20%	25%	36%	19%	364	5.1
<b>GENDER</b>						
Male	20%	17%	46%	18%	2220	2.1
Female	21%	17%	41%	21%	2262	2.1
<b>AGE</b>						
<25	22%	19%	42%	17%	279	5.9
25-44	19%	15%	46%	20%	1432	2.6
45-64	19%	18%	44%	19%	1923	2.2
65+	24%	17%	39%	20%	848	3.4
<b>EDUCATION</b>						
High school or less	23%	21%	32%	24%	1301	2.7
College or CEGEP	20%	19%	39%	22%	1459	2.6
University or higher	19%	12%	55%	14%	1722	2.4
<b>CURRENT VOTE INTENTION</b>						
Conservative Party of Canada	26%	14%	45%	14%	1406	2.6
Liberal Party of Canada	20%	15%	48%	16%	1050	3.0
NDP	17%	20%	48%	16%	552	4.2
Green Party	13%	19%	45%	23%	358	5.2
Bloc Quebecois	15%	21%	40%	23%	503	4.4
Undecided	25%	18%	25%	32%	97	10.0

### **Support for Coalition Government**

*Q. If you were forced to choose between a Conservative government led by Stephen Harper and a coalition government made of up Liberal and New Democrats and led by Liberal leader Michael Ignatieff, which would you prefer?*

	A Conservative government	A coalition government	DK/NR	Sample Size	Margin of Error (+/-)
<b>NATIONALLY</b>	<b>41%</b>	<b>39%</b>	<b>20%</b>	<b>4482</b>	<b>1.5</b>
<b>REGION</b>					
British Columbia	43%	40%	17%	396	4.9
Alberta	66%	21%	13%	421	4.8
Saskatchewan/Manitoba	51%	29%	21%	291	5.7
Ontario	42%	40%	17%	1576	2.5
Quebec	27%	44%	30%	1434	2.6
Atlantic Canada	36%	45%	19%	364	5.1
<b>GENDER</b>					
Male	45%	39%	16%	2220	2.1
Female	37%	39%	24%	2262	2.1
<b>AGE</b>					
<25	32%	47%	21%	279	5.9
25-44	39%	41%	19%	1432	2.6
45-64	41%	37%	22%	1923	2.2
65+	51%	32%	18%	848	3.4
<b>EDUCATION</b>					
High school or less	45%	27%	28%	1301	2.7
College or CEGEP	45%	33%	23%	1459	2.6
University or higher	35%	52%	13%	1722	2.4
<b>CURRENT VOTE INTENTION</b>					
Conservative Party of Canada	87%	6%	7%	1406	2.6
Liberal Party of Canada	17%	67%	17%	1050	3.0
NDP	19%	64%	17%	552	4.2
Green Party	26%	47%	27%	358	5.2
Bloc Quebecois	19%	49%	32%	503	4.4
Undecided	28%	37%	35%	97	10.0

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## 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 January 13-26, 2011<sup>1</sup>. In total, a random sample of 4,622 Canadians aged 18 and over responded to the survey (including a sub-sample of 3,966 decided voters). The margin of error associated with the total sample is +/-1.4 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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<sup>1</sup> Please note that these dates are not inclusive of weekends, as we do not survey on Saturday or Sunday.

Annex I:



## INTERACTIVE VOICE RESPONSE: THE PAST, THE PRESENT, AND INTO THE FUTURE

**Presentation to: The MRIA, Ottawa Chapter  
January 21, 2011**



### Dialing In

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## Current State of Survey Research

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- » Massive changes in polling and survey research
- » Biggest is drift from live CATI to online methods
  - Fast, inexpensive
  - Self-administered
  - Multi-media capabilities
- » BUT non-probability online methods lack representativeness
  - Non-coverage issues
  - Not randomly selected
- » Another option: Interactive Voice Response (IVR) for both data collection and probability panel construction



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## Interactive Voice Response (IVR)

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## Advantages and Disadvantages of IVR

- » Advantages
  - + Perhaps closest to national population
  - + Avoids social desirability
  - + Cost-effective
  - + Higher reliability due to large sample sizes
  
- » Disadvantages
  - Higher non-response
  - Survey must be shorter
  - Some design limits
  - Reputation
  - Intrusiveness



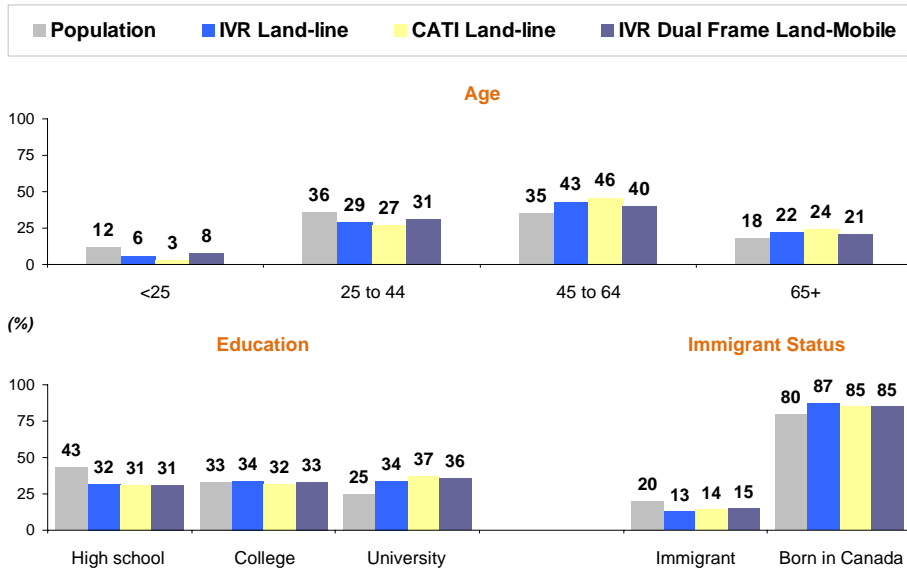
## Accuracy of Results

- » Rob Ford election as recent illustration of IVR success
  - Coverage issue (older, vulnerable)
  - Social desirability issues (closet supporters)
  
- » 2008 federal election (EKOS results most accurate of RDD polls – see <http://www.sfu.ca/~aheard/elections/results.html>)
  
- » U.S. mid-terms (mixed results – clear lessons)
  
- » IVR is good for short polls and for population seeding a panel, BUT live follow-up is crucial:
  - Verification
  - Explanation
  - Create dossier of key demographics





## Demographic Analysis – IVR vs. CATI



## Response Rate – IVR vs. CATI

	IVR Landline Sample	Live Interviewer CATI Landline Sample
<b>Final Disposition</b>		
Unused	0	0
A Invalid numbers	14,395	4,829
B Unresolved	5,707	8,083
C Non-responding (unknown eligibility)	0	0
D Ineligible (language barrier)	2,200 (estimated)	1,129
E Non-responding (eligible)	37,922	12,009
F Completed interviews	1,976	3,009
<b>TOTALS</b>	<b>60,000</b>	<b>29,059</b>
<b>Response Rate</b>		
Empirical Method $(f+d)/(b+d+e+f+c)$	8.7%	17.08%



## Conclusions

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## Considerations

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- » IVR in and of itself is not a polling method
  - Still need rigorous sampling, callbacks, etc.
  - But provides excellent equilibrium of cost and quality in appropriate circumstances
- » Hugely neglected area (largely reputational), but will improve
- » IVR is vastly superior to non-probability online polls or even live CATI omnibus (purpose built IVR versus uncertain context of omnibus)
- » Response rate issue overstated; non-response about half live CATI

## Capabilities

- » In the United States, when pollsters had the accuracy of their results tested during the 2008 primary and election year, the two companies employing IVR were rated first and eighth among more than forty companies by the leading website monitoring polling in the U.S.
- » AAPOR has indicated:  
*"...the use of either computerized telephone interviewing (CATI) techniques or interactive voice response (IVR) techniques made no difference to the accuracy of estimates..." (in U.S. pre-primary polls)*
- » The Pew Research Center has reported:  
*"...the mean error among IVR polls [in the 2008 U.S. election] was slightly lower than among those with live interviewers."*

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## Emerging Issues

- » Education and civic literacy/interest bias
- » Better sampling and weighting
- » No long form census?
- » The cell phone only household
- » Broader credibility of scientific samples/evidence based research

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