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LIBERALS WIDEN LEAD ON EVE OF THRONE SPEECH

CONFIDENCE IN NATIONAL DIRECTION NEARS ALL-TIME LOW

[Ottawa – October 16, 2013] Three months ago, things were looking up for the federal Conservatives. The fireworks and revelry of Canada Day were drumming up confidence in national direction and, with the media's preoccupation with Senate scandals fading away with the summer heat, the Conservative Party pulled its way into a statistical tie with the newly resurrected Liberals.

It seems, however, that with the onset of fall and a renewed focus on federal affairs, Conservative fortunes have drifted away along with the summer. The Liberals now hold a commanding 10-point lead over the Conservative Party and now out-perform their governing counterparts in every region outside Alberta.

Furthermore, the Liberals hold a lead in every age bracket except for youth, where the NDP claim the lead. The Liberals hold a commanding lead among university graduates, although they continue to trail behind those with no post-secondary education.

The Conservatives still lead handily in Alberta and they continue to do quite strongly among men, high school and college graduates, and baby boomers. They do comparatively poorly, however, among women, Quebeckers, and those under the age of 45 (particularly youth).

The NDP, which saw its numbers tumble earlier this year, has enjoyed a slow but steady rebound due in no small part to their burgeoning popularity with young Canadians. At 25 points, the party is well short of its last election showing, although it is far from out of the race.

So what is causing this improvement in Liberal fortunes? There are a number of factors that could be at play. First, there is the issue of Mr. Harper's recent decision to prorogue Parliament. Prorogation has always proved itself immensely unpopular with Canadians. Indeed, when Ignatieff held the reigns, his party overtook the Conservatives only twice – in the wake of his coronation in early 2009 and during the prorogation controversy of early 2010. Another explanation is that is that the renewed media focus on the myriad of scandals facing the Senate,

HIGHLIGHTS

- **Federal vote intention:**
 - ▣ **36.3% Liberal Party**
 - ▣ **26.1% Conservative Party**
 - ▣ **24.9% NDP**
 - ▣ **6.5% Green Party**
 - ▣ **5.0% Bloc Québécois**
 - ▣ **1.1% Other**
- **Direction of country**
 - ▣ **37.4% Right direction**
 - ▣ **52.3% Wrong direction**
- **Direction of government**
 - ▣ **32.3% Right direction**
 - ▣ **56.1% Wrong direction**

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



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as well as the Del Mastro charges, have soured Canadians to the current government and the direction in which we are headed. However, we have no direct evidence that either of these factors are the cause and these points are purely speculative at this time.

A more plausible explanation is that the continued erosion of economic outlook and, in particular, a rising sense of lost control is behind this shift. In particular, the weak performance of the youth labour market may be why young Canadians are moving to other choices. There is a clear, negative correlation between Conservative support and those who see worse economic outcomes on the horizon. Furthermore, confidence in both direction of the country and the federal government is nearing an all-time low. Indeed, confidence in direction of government has now become a mirror of federal party support – those who say the Government of Canada is moving in the right direction are almost exclusively found in the ranks of Conservative supporters while those outside the party camp are nearly unanimous in their view that the government is going in the wrong direction.

Whatever the cause, it will be interesting to see whether or not these numbers hold through until 2015.

Perhaps the more interesting finding of this poll is not the voters' first choice, but rather their *second* choice. While 36 per cent of decided and leaning voters told us that they would vote for the Liberals were an election held today, 19 per cent also say they would consider the party as an alternative option, giving the Liberals a vote ceiling of 55 per cent. The NDP have even more room to expand (24 per cent), giving them a potential vote ceiling of 49 points. The Conservatives, meanwhile, seem largely eroded to their core base of supporters, with just one-third of Canadians indicating they would consider voting for them. These voters, however, are fiercely committed to their party and the majority would not even consider voting for another party, be it the Liberals, the NDP, the Greens, or the Bloc.

So what are the implications here? Well, nearly half of Liberal supporters (49 per cent) would consider voting NDP, while a similar proportion of NDP voters (45 per cent) would be open to swinging Liberal. Do the math and we see that roughly one-third of the electorate identifies itself as left-of-centre and would consider voting Liberal or NDP. With Conservative supporters largely isolated from this battle for the centre-left, it seems that the key battle for the next election will not be a Liberal-versus-Conservative or NDP-versus-Conservative, but rather Liberal-versus-NDP.

While vote-splitting will certainly be key to any success of the Conservative party in the next election, it may not be enough to propel the party to another election victory in 2015 (and will certainly not be enough at these numbers). Combined, the Liberals and the NDP control 61 per cent of the vote, up from 54 per cent in July. These numbers do not leave a lot of room for a Conservative government, despite the centre-left's cannibalistic practice of consuming each other's votes. These dynamics may, however, raise the issue of a coalition government.

Top Line Results:

Federal vote intention

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

National Results



2011 Election Results



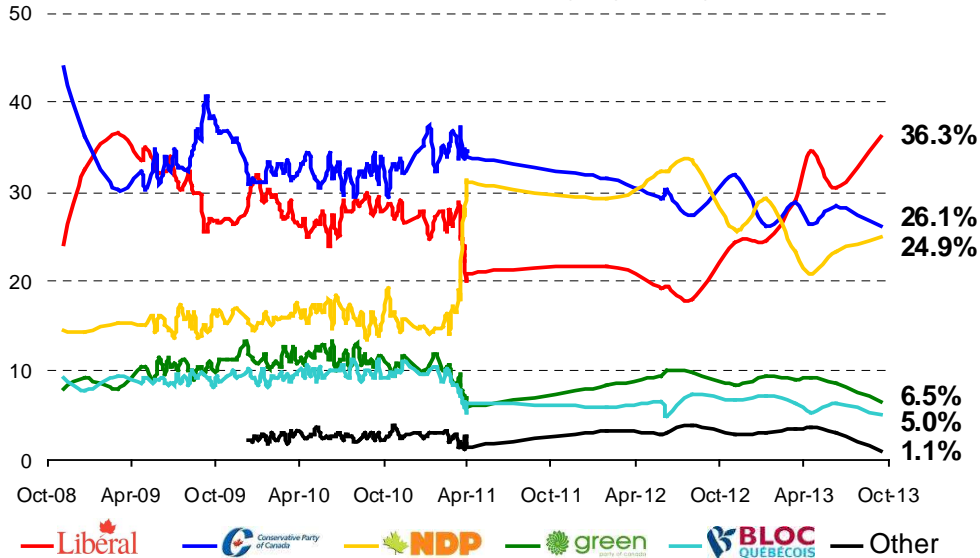
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 9.4% of respondents are undecided and 0.5% are ineligible to vote.

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BASE: Canadians; October 10-14, 2013 (n=1,554)

Tracking federal vote intention

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



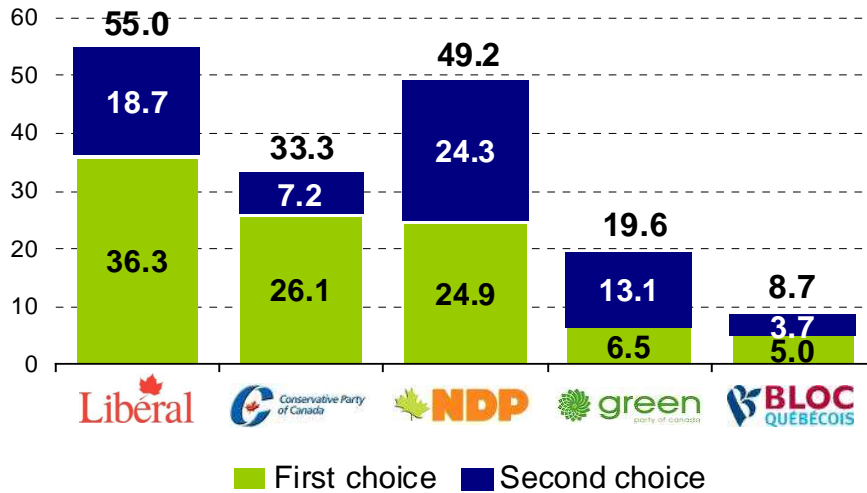
Note: The data on federal vote intention are based on decided and leaning voters only. Our survey also finds that 9.4% of respondents are undecided and 0.5% are ineligible to vote.

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BASE: Canadians; most recent data point October 10-14, 2013 (n=1,554)

Vote ceiling

Q. If a federal election were held tomorrow, which party would you vote for?
 Q. Talking again in terms of a federal election, which party would be your second choice?

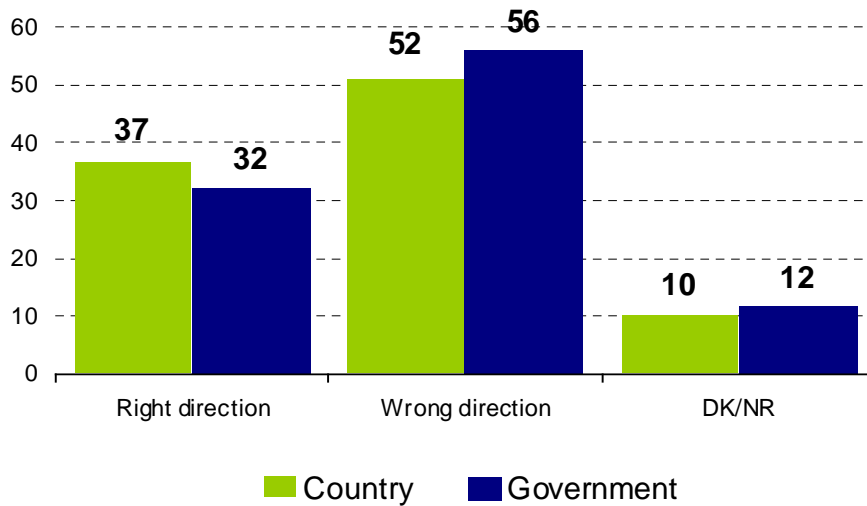


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BASE: Canadians; October 10-14, 2013 (n=1,554)

Direction of country/government

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



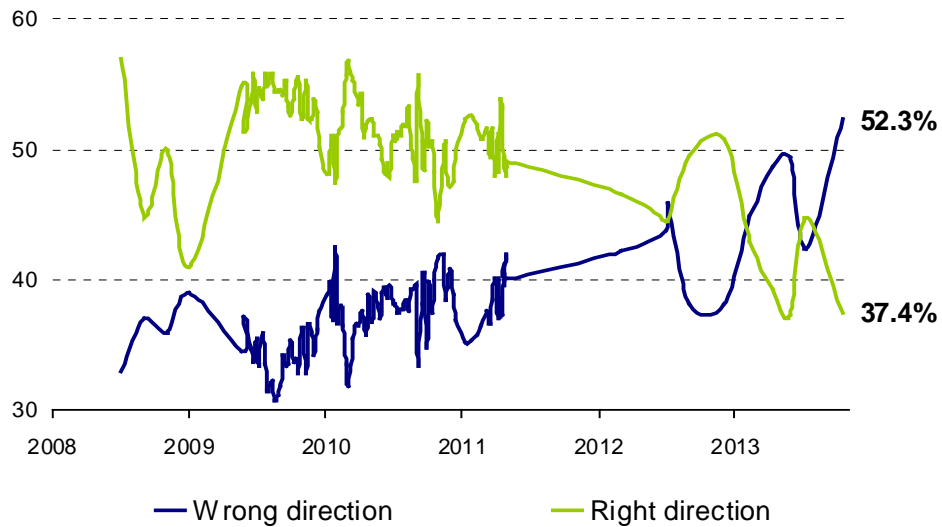
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BASE: Canadians (half-sample each); October 10-14, 2013 (n=799/755)



Direction of country

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

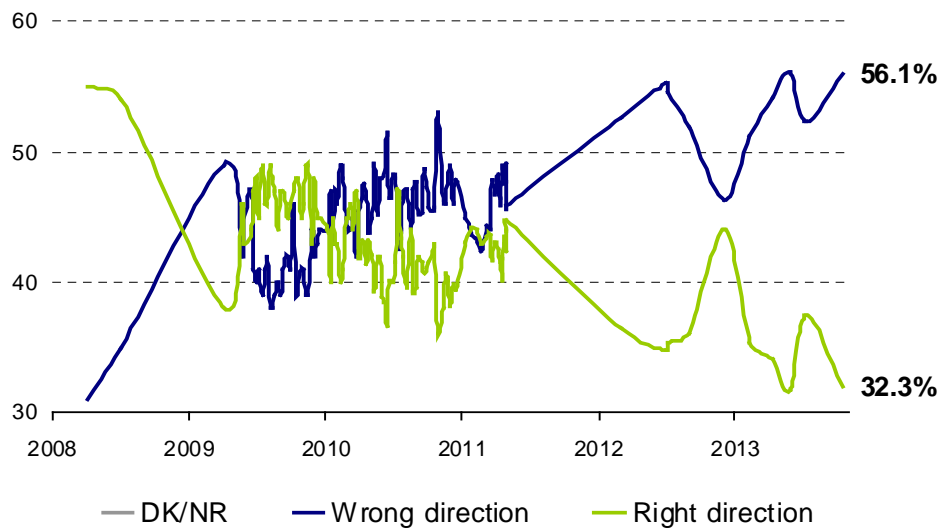


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BASE: Canadians (half-sample); October 10-14, 2013 (n=799)

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); October 10-14, 2013 (n=755)








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	36.3%	26.1%	24.9%	6.5%	5.0%	1.1%	1401	2.6
REGION								
British Columbia	33.0%	25.1%	23.8%	16.9%	0.0%	1.2%	231	6.4
Alberta	26.7%	48.5%	15.3%	7.4%	0.0%	2.0%	130	8.6
Saskatchewan	44.1%	28.9%	16.5%	10.5%	0.0%	0.0%	33	17.1
Manitoba	40.4%	34.9%	22.7%	0.0%	0.0%	2.0%	49	14.0
Ontario	39.6%	26.9%	27.9%	4.9%	0.0%	0.8%	591	4.0
Quebec	31.0%	13.0%	28.7%	4.1%	21.6%	1.6%	270	6.0
Atlantic Canada	50.7%	29.1%	17.3%	2.9%	0.0%	0.0%	90	10.3
GENDER								
Male	37.0%	30.1%	22.3%	5.6%	4.1%	0.9%	756	3.6
Female	35.5%	22.1%	27.6%	7.5%	6.0%	1.3%	645	3.9
AGE								
<25	30.3%	9.8%	43.6%	6.2%	6.7%	3.4%	42	15.1
25-44	36.3%	21.9%	25.5%	8.5%	6.8%	1.1%	414	4.8
45-64	36.9%	32.1%	20.0%	5.4%	5.1%	0.5%	579	4.1
65+	38.4%	30.4%	23.2%	5.9%	0.9%	1.2%	292	5.7
EDUCATION								
High school or less	28.5%	33.3%	27.2%	5.2%	4.9%	0.9%	191	7.1
College or CEGEP	30.4%	30.2%	27.5%	6.5%	4.2%	1.3%	423	4.8
University or higher	41.2%	22.1%	23.1%	7.0%	5.5%	1.1%	777	3.5
COUNTRY OF BIRTH								
Canada	35.4%	26.5%	24.7%	6.8%	5.5%	1.2%	1222	2.8
Other	41.3%	21.4%	29.0%	5.3%	1.9%	1.0%	164	7.7



National Federal Vote Intention (continued)






*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?*

	 Liberal	 Conservative Party of Canada	 NDP	 green party of canada	 BLOC QUÉBÉCOIS	Other	Sample Size	Margin of Error (+/-)
NATIONALLY	36.3%	26.1%	24.9%	6.5%	5.0%	1.1%	1401	2.6
VOTE IN 2011 ELECTION								
Did not vote	31.4%	21.8%	26.5%	10.8%	0.0%	9.4%	45	14.6
Conservative Party	14.3%	78.1%	4.6%	2.0%	0.2%	0.8%	457	4.6
NDP	28.4%	2.9%	63.2%	4.2%	1.2%	0.2%	389	5.0
Liberal Party	87.5%	2.2%	8.5%	1.8%	0.0%	0.0%	332	5.4
Green Party	17.4%	0.0%	11.7%	69.4%	0.0%	1.4%	78	11.1
Bloc Québécois	6.5%	5.1%	12.1%	0.0%	76.3%	0.0%	67	12.0



Second Choice

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

	 Liberal	 Conservative Party of Canada	 NDP	 Green	 BLOC QUEBECOIS	Other	No 2 nd choice	Sample Size	Margin of Error (+/-)
NATIONALLY	18.7%	7.2%	24.3%	13.1%	3.7%	3.1%	29.9%	1467	2.6
REGION									
British Columbia	24.0%	6.9%	24.0%	16.9%	0.0%	2.3%	25.9%	244	6.3
Alberta	17.9%	9.8%	14.8%	14.3%	0.0%	5.6%	37.6%	136	8.4
Saskatchewan	12.4%	11.3%	32.5%	5.4%	0.0%	5.8%	32.6%	34	16.8
Manitoba	25.2%	6.9%	28.2%	13.4%	0.0%	1.6%	24.7%	51	13.7
Ontario	19.9%	7.1%	23.1%	15.8%	0.0%	3.2%	30.8%	611	4.0
Quebec	13.6%	7.0%	26.3%	6.4%	15.6%	2.7%	28.3%	289	5.8
Atlantic Canada	18.1%	3.5%	34.1%	15.4%	0.0%	1.5%	27.5%	95	10.1
GENDER									
Male	21.1%	9.1%	23.8%	12.6%	3.5%	4.3%	25.7%	779	3.5
Female	16.3%	5.5%	24.7%	13.7%	3.9%	2.0%	33.9%	688	3.7
AGE									
<25	24.0%	7.0%	18.7%	15.5%	6.0%	3.3%	25.5%	43	14.9
25-44	19.8%	7.0%	27.0%	13.0%	5.1%	3.5%	24.7%	433	4.7
45-64	16.0%	6.7%	26.1%	11.7%	2.3%	3.4%	33.9%	609	4.0
65+	19.7%	9.2%	22.3%	12.4%	2.6%	1.8%	32.1%	299	5.7
EDUCATION									
High school or less	17.1%	6.0%	22.2%	14.7%	2.2%	3.1%	34.7%	204	6.9
College or CEGEP	17.2%	8.5%	19.6%	12.8%	4.6%	2.8%	34.6%	449	4.6
University or higher	19.9%	7.0%	27.5%	12.8%	3.6%	3.3%	25.9%	804	3.5
COUNTRY OF BIRTH									
Canada	17.7%	6.5%	24.8%	13.0%	4.0%	3.2%	30.7%	1277	2.7
Other	24.9%	11.5%	20.4%	15.0%	1.4%	3.1%	23.6%	174	7.4
CURRENT VOTE INTENTION									
Liberal Party	--	14.0%	49.1%	16.9%	1.8%	0.7%	17.6%	523	4.3
Conservative Party	23.9%	--	8.6%	6.3%	1.2%	5.6%	54.5%	402	4.9
NDP	44.9%	5.8%	--	21.4%	10.1%	1.5%	16.4%	316	5.5
Green Party	27.0%	9.5%	35.1%	--	5.0%	2.7%	20.8%	92	10.2
Bloc Quebecois	0.0%	2.9%	45.0%	11.2%	--	4.6%	36.3%	55	13.2


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 (+/-)
NATIONALLY	37.4%	52.3%	10.3%	799	3.5
REGION					
British Columbia	40.6%	52.8%	6.7%	130	8.6
Alberta	56.2%	32.2%	11.7%	81	10.9
Saskatchewan	35.7%	59.0%	5.2%	20	21.9
Manitoba	33.3%	43.9%	22.8%	29	18.2
Ontario	40.0%	49.9%	10.1%	318	5.5
Quebec	26.3%	62.7%	11.0%	162	7.7
Atlantic Canada	30.6%	60.1%	9.4%	55	13.2
GENDER					
Male	43.0%	47.0%	10.0%	399	4.9
Female	32.5%	56.9%	10.6%	400	4.9
AGE					
<25	32.4%	54.7%	13.0%	29	18.2
25-44	37.3%	53.6%	9.1%	253	6.2
45-64	40.0%	48.0%	12.0%	297	5.7
65+	40.8%	51.6%	7.7%	170	7.5
EDUCATION					
High school or less	42.8%	46.1%	11.1%	114	9.2
College or CEGEP	41.6%	46.8%	11.5%	252	6.2
University or higher	33.5%	57.2%	9.3%	430	4.7
COUNTRY OF BIRTH					
Canada	36.4%	53.2%	10.4%	695	3.7
Other	44.6%	45.3%	10.1%	99	9.9
CURRENT VOTE INTENTION					
Liberal Party	30.3%	57.9%	11.8%	259	6.1
Conservative Party	84.1%	10.0%	5.9%	200	6.9
NDP	15.4%	76.7%	7.9%	164	7.7
Green Party	19.1%	70.7%	10.1%	53	13.5
Bloc Quebecois	18.2%	71.7%	10.0%	29	18.2



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	32.3%	56.1%	11.5%	755	3.6
REGION					
British Columbia	31.9%	62.4%	5.7%	125	8.8
Alberta	37.9%	42.9%	19.2%	67	12.0
Saskatchewan	46.7%	41.0%	12.3%	15	25.3
Manitoba	38.7%	53.0%	8.3%	24	20
Ontario	34.2%	54.4%	11.4%	323	5.5
Quebec	22.1%	64.7%	13.2%	143	8.2
Atlantic Canada	41.2%	49.5%	9.3%	54	13.3
GENDER					
Male	37.1%	55.4%	7.5%	421	4.8
Female	27.4%	56.9%	15.7%	334	5.4
AGE					
<25	19.9%	73.3%	6.8%	16	24.5
25-44	30.0%	55.6%	14.4%	219	6.6
45-64	36.4%	52.9%	10.7%	340	5.3
65+	34.4%	56.3%	9.3%	139	8.3
EDUCATION					
High school or less	38.4%	43.9%	17.7%	109	9.4
College or CEGEP	34.2%	52.0%	13.7%	234	6.4
University or higher	29.3%	61.9%	8.8%	405	4.9
COUNTRY OF BIRTH					
Canada	31.8%	56.8%	11.3%	657	3.8
Other	34.4%	54.2%	11.4%	86	10.6
CURRENT VOTE INTENTION					
Liberal Party	17.1%	74.4%	8.5%	264	6.0
Conservative Party	87.9%	6.3%	5.9%	202	6.9
NDP	8.1%	79.9%	12.0%	152	8.0
Green Party	9.9%	75.4%	14.8%	39	15.7
Bloc Quebecois	8.8%	80.4%	10.7%	26	19.2

Methodology:

This study was conducted 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 this survey are October 10-14, 2013. In total, 1,554 Canadians aged 18 and over responded to the survey. Of these cases, 1,400 were collected online, while 154 were collected by computer assisted telephone interviews (CATI). The margin of error associated with the total sample is +/-2.5 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 sample's composition reflects that of the actual population of Canada according to Census data.