

Summary:

- The Liberals are back. Not only are they closing the gap with the CPC in the top line vote, they have started to reverse their decline in brand attributes versus the CPC.
- While the Liberal brand promise is starting to regain its ground and is improving on most issues, Canadians still associate it mostly with women's rights and climate change. General the Liberals are dropping negatives with non-Liberals and building intensity within their base. But they are competitive on the emerging issue, Trump.
- Although Canadians are very familiar with Poilievre—only 6% do not know him—his net favourable score is -6%. In comparison, 20% of Canadians are not familiar with Carney, but his net favourable score is +9%, giving him a 15-point advantage over Poilievre today.
- In a climate in which 61% of Canadians feel more afraid than excited about Trump's renewed presidency, and 4 in 5 Canadians are concerned about the looming threat of tariffs, neither party has an advantage as capable of dealing with Canadian sovereignty and national identity issues.
 - Canadians are split on Carney and Poilievre being best equipped in handling Trump's renewed presidency. Those who are more afraid than excited continue to see Carney as being more effective than Poilievre. Between Freeland and Poilievre, Canadians generally feel Poilievre is better equipped.

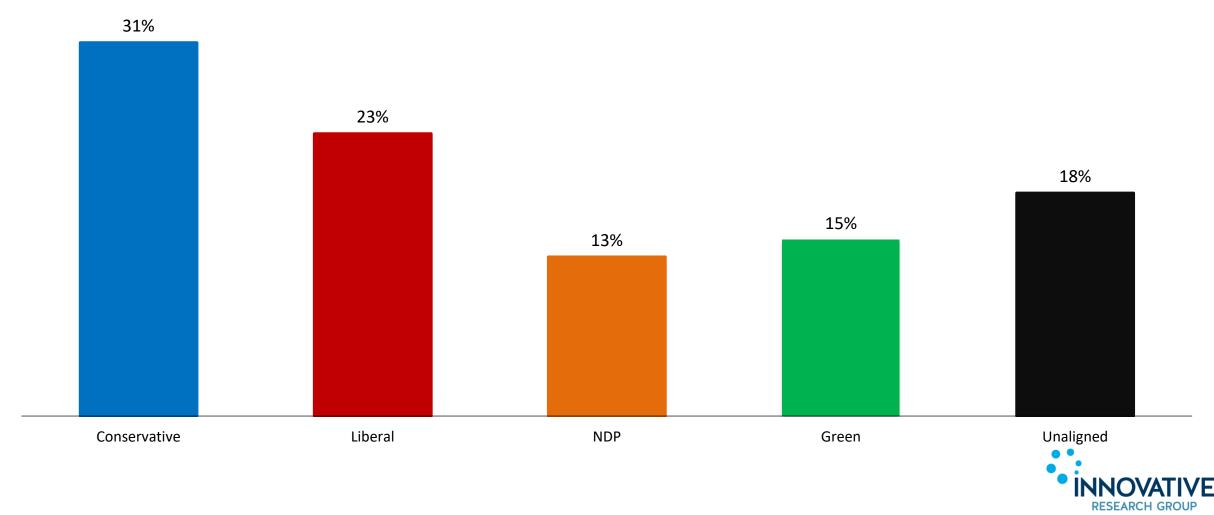
Key Voter Segments

Federal Party ID:

Conservative continue to retain advantage in party identification

Q

Thinking about politics in Canada, generally speaking, do you usually think of yourself as a... [asked of all respondents; n=1000]



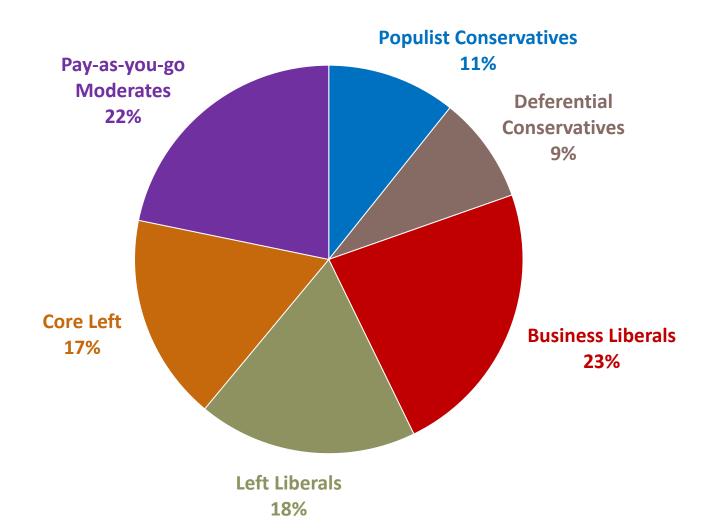
Value Clusters:

Pay-as-you-go-Moderates and Business Liberals are both larger than the two Conservative segments combined



Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

[asked of all respondents; n=1,000]





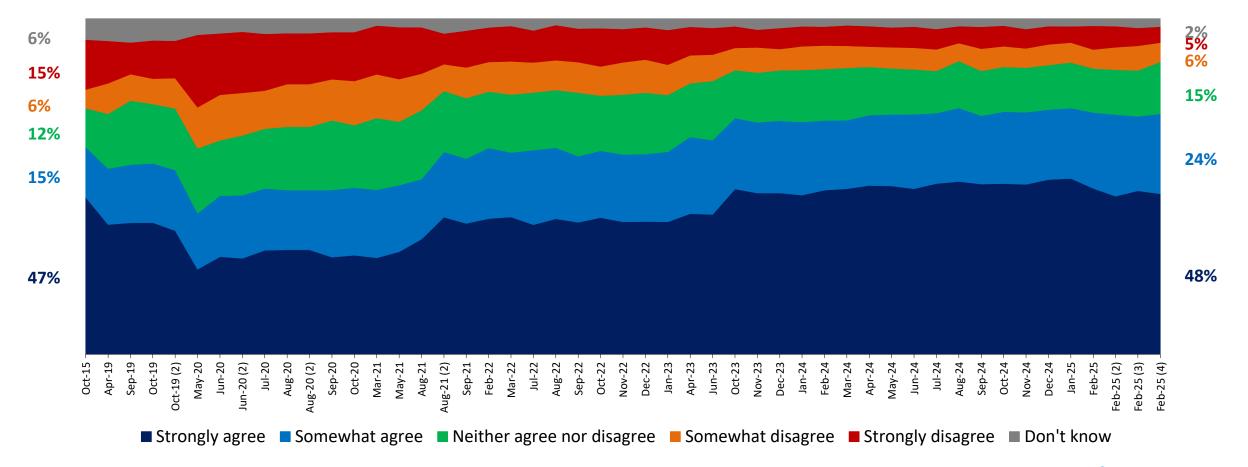
Time for Change

Time for Change Tracking:

Time for a change remains high with 72% of Canadians at least somewhat agree

Q

Do you agree or disagree with the following statements? It is time for a change in government here in Canada [asked of all respondents; n=1000]



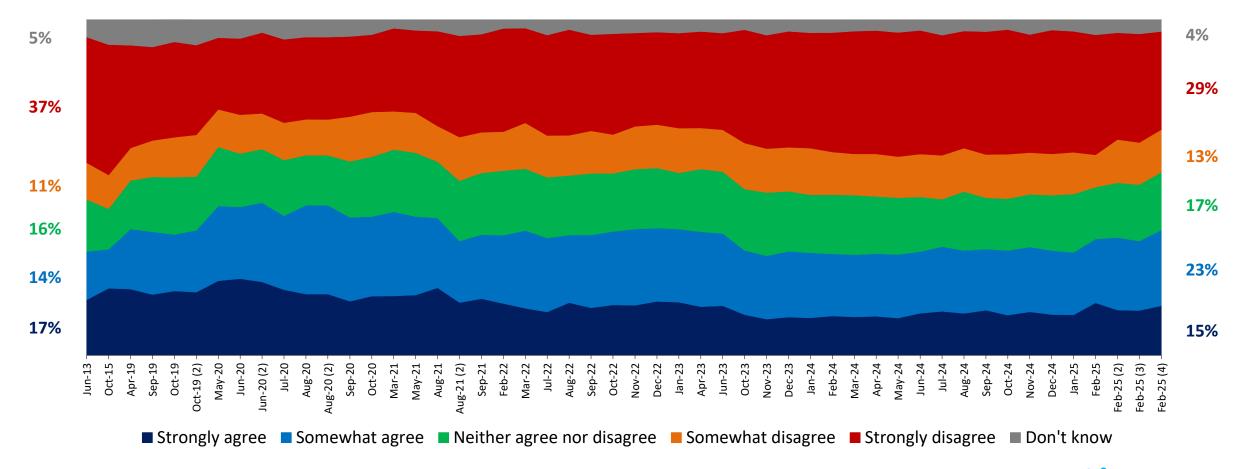


Time for Change Tracking:

Canadians increasingly agree that despite their problems, the Liberals are the best party to form government

Q

Do you agree or disagree with the following statements? - The Liberals may have their problems but they are still the best party to form government [asked of all respondents; n=1000]





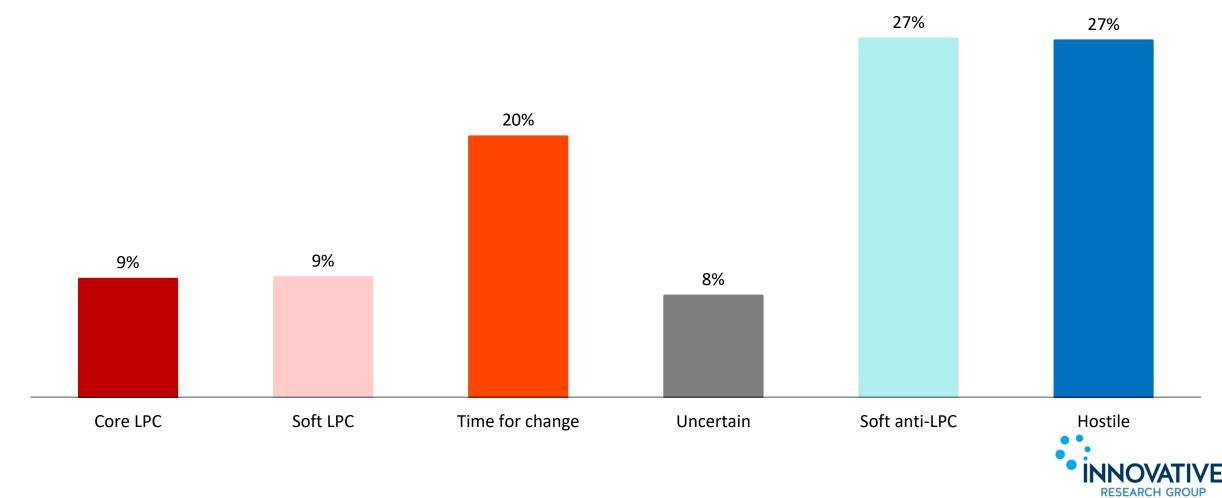
Time for Change Segmentation:

At 20%, the conflicted Time-for-a-change Liberals are the key voter segment



Time for Change segmentation: Agree with 'The Liberals may have their problems but they are still the best party to form government' BY Agree with 'It is time for a change in government here in Canada'.

[asked of all respondents; n=1000]



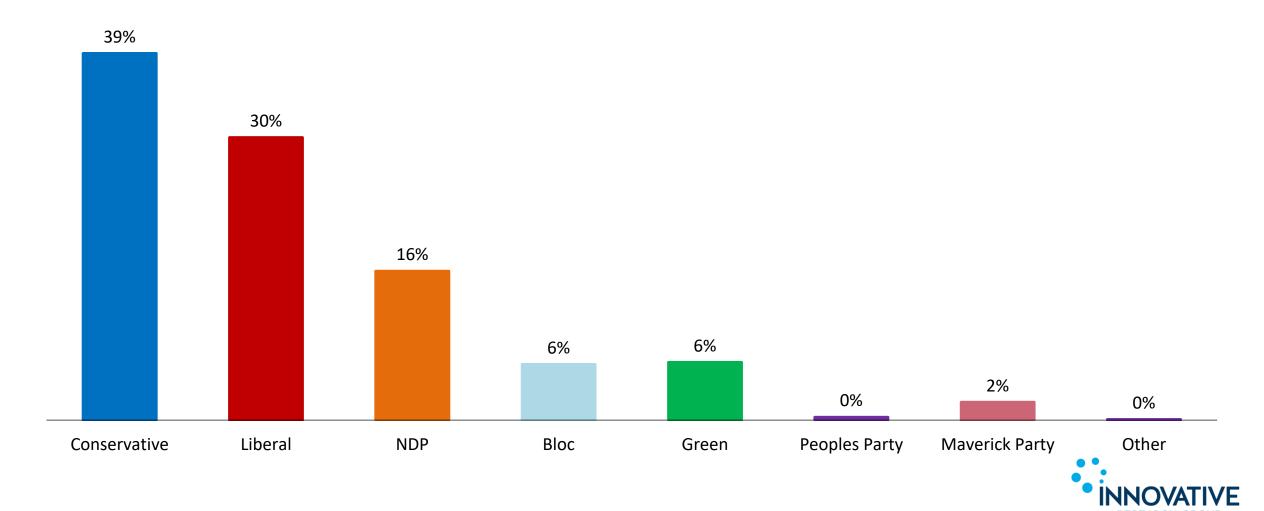
Federal Vote

Federal Decided Vote:

Conservatives hold a 9% lead above the Liberals among decided voters

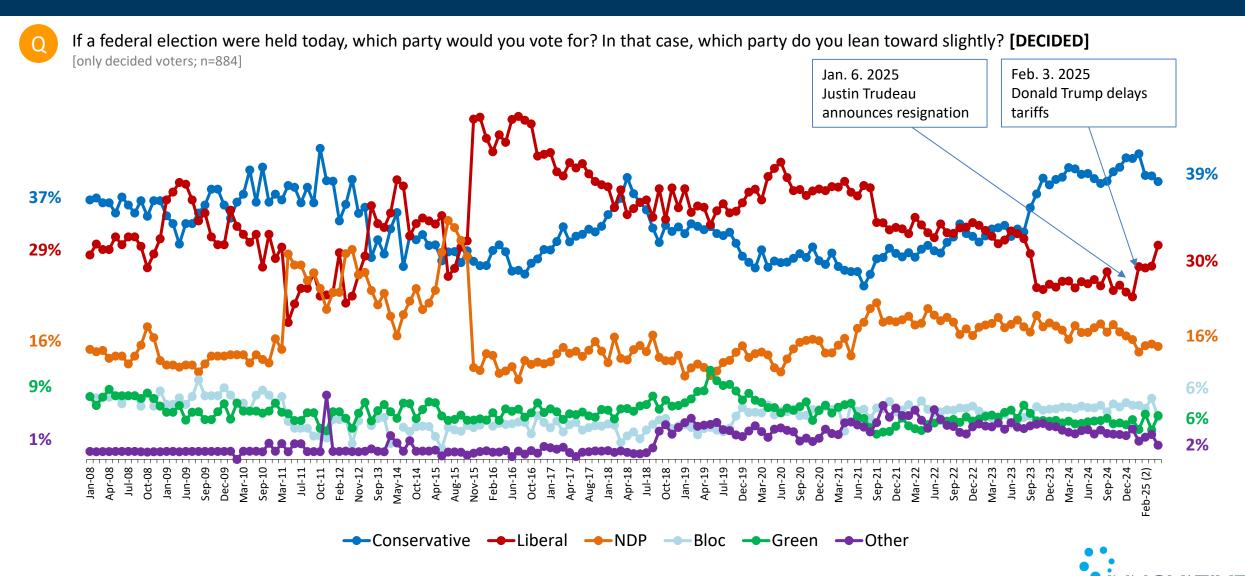
Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED] [decided voters only; n=884]



Federal Decided Vote Tracking:

The Conservative lead has dropped from 20 points in January down to 9-points last week



Decided Vote

Decided Vote BY Region:

Liberals now lead in the Atlantic and Quebec

Decided vote by Region

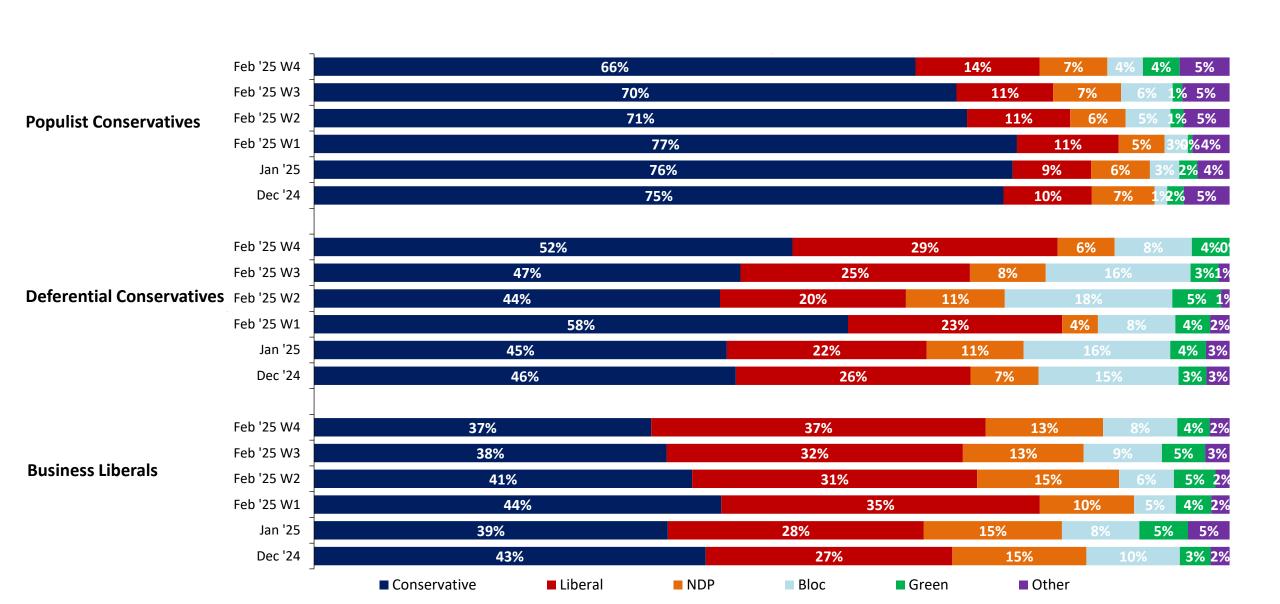
REGION

	ВС	AB	Prairies	ON	QC	Atlantic
	(n=123)	(n=101)	(n=55)	(n=344)	(n=203)	(n=57)
Conservative	39%	55%	45%	42%	26%	37%
Liberal	21%	19%	28%	34%	31%	46%
NDP	27%	18%	20%	16%	9%	11%
Bloc	0%	0%	0%	0%	26%	0%
Green	11%	2%	7%	5%	7%	3%
Other	1%	5%	1%	3%	1%	2%



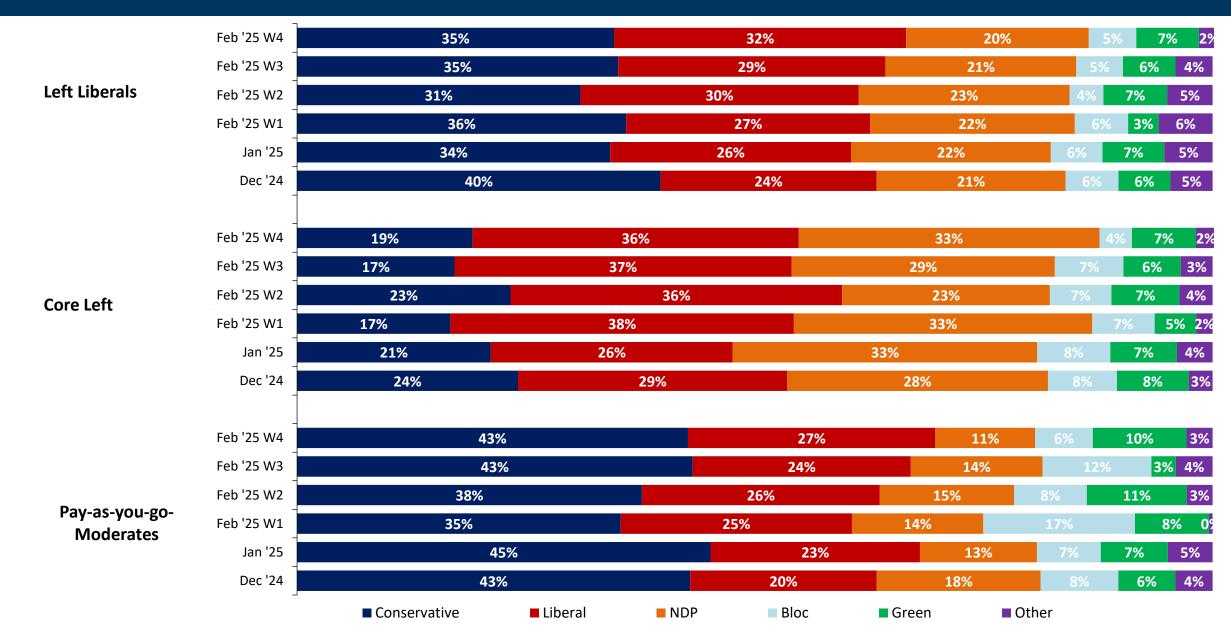
Decided Vote by Value Clusters (Part 1):

Liberals have gained 10-points among Business Liberals but not among conservative value clusters



Decided Vote by Value Clusters (Part 2):

Liberals are making gains broadly across centre-left value clusters

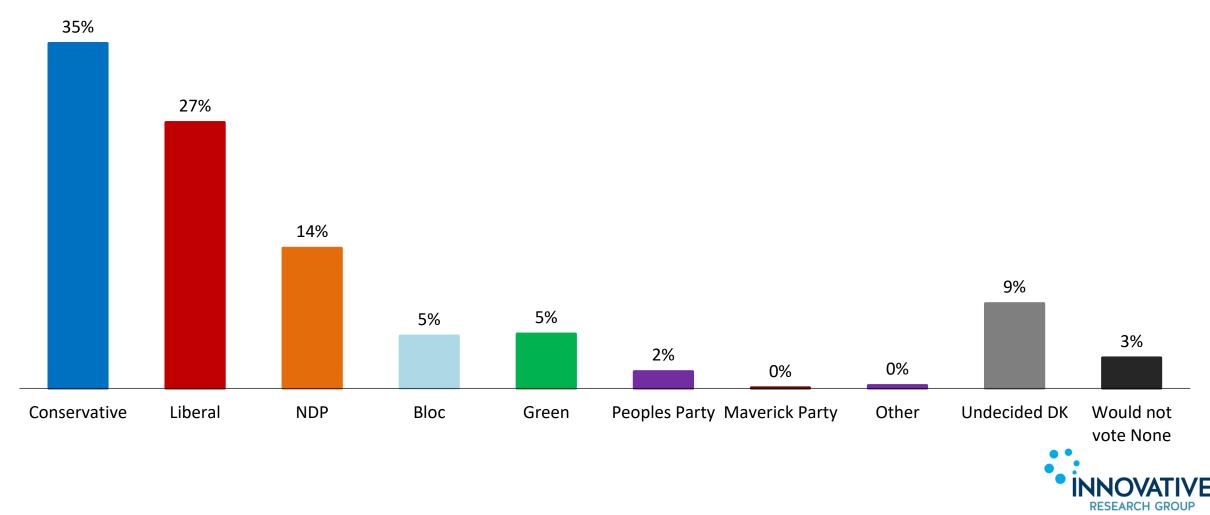


Federal Combined Vote:

8-point Conservative lead over Liberals



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [Vote + Lean] [asked of all respondents; n=1000]

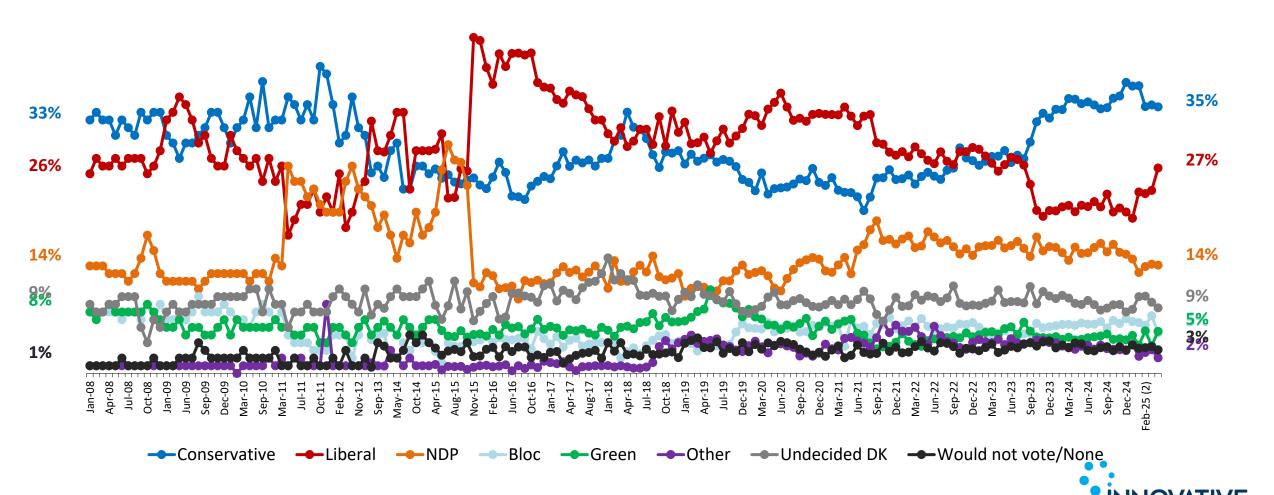


Federal Vote Tracking:

Liberals show steady momentum while the undecided drops

Q

If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [Vote + Lean] [asked of all respondents; n=1000]



Combined Vote BY Value clusters:

Conservatives still lead in conservative clusters and the "Pay-as-you-go Moderates" but the Liberals are drawing even in the centrist and Core Left clusters

['Would not vote None' omitted from the 'Combine Vote' due to small sample size n=30]

Value Clusters

	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
	(n=107)	(n=89)	(n=232)	(n=182)	(n=172)	(n=218)
Conservative	62%	48%	33%	31%	17%	35%
Liberal	13%	26%	33%	29%	31%	22%
NDP	7%	6%	12%	18%	29%	9%
Bloc	4%	8%	7%	5%	3%	5%
Green	4%	4%	3%	6%	6%	8%
Undecided DK	5%	8%	8%	8%	8%	12%



Combined Vote

Combined Vote BY Federal Party ID:

Liberals are rebuilding support among their partisans

['Would not vote None' omitted from the 'Combine Vote' due to small sample size n=30]

Federal Party ID

	CPC	Liberal	NDP	Green/Other	Unaligned
	(n=307)	(n=233)	(n=131)	(n=145)	(n=184)
Conservative	87%	9%	4%	15%	18%
Liberal	5%	81%	18%	10%	15%
NDP	3%	5%	73%	9%	6%
Bloc	1%	2%	0%	30%	2%
Green	1%	1%	1%	23%	8%
Undecided DK	2%	2%	2%	6%	35%



Combined Vote BY Time for Change Segmentation:

Liberals have over half the vote in the conflicted Time-for-a-Change Liberal segment

['Would not vote None' omitted from the 'Combine Vote' due to small sample size n=30]

Time for Change Segmentation

	Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
	(n=90)	(n=91)	(n=198)	(n=77)	(n=273)	(n=271)
Conservative	2%	8%	17%	8%	34%	76%
Liberal	88%	58%	52%	14%	8%	1%
NDP	4%	13%	16%	15%	23%	8%
Bloc	3%	6%	2%	10%	9%	3%
Green	1%	7%	4%	6%	8%	5%
Undecided DK	1%	7%	7%	35%	11%	2%



Leadership

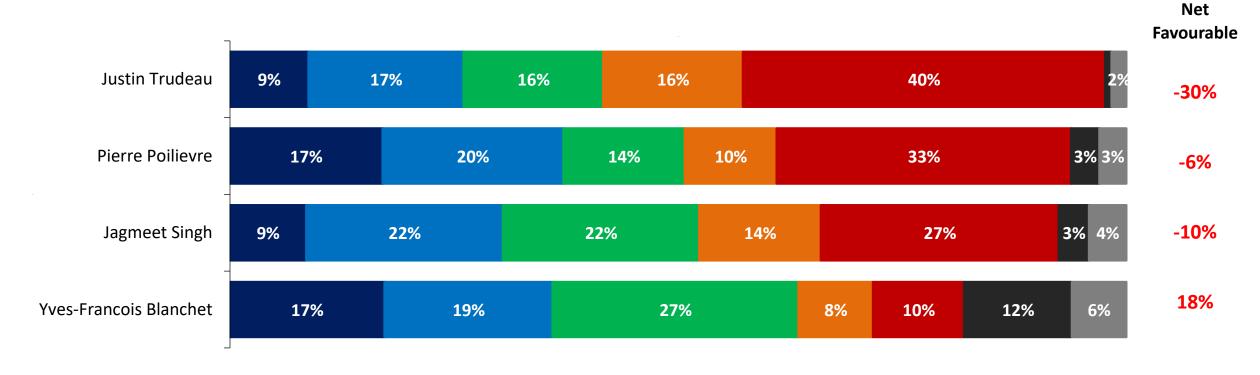
Leader Favourables:

With 56% unfavourability, Trudeau remains unpopular. Blanchet has the only net favourable image



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=1,000]



■ Very favourable Somewhat favourable Neutral/Neither favourable nor unfavourable Somewhat unfavourable Very unfavourable Do not recognize Don't know



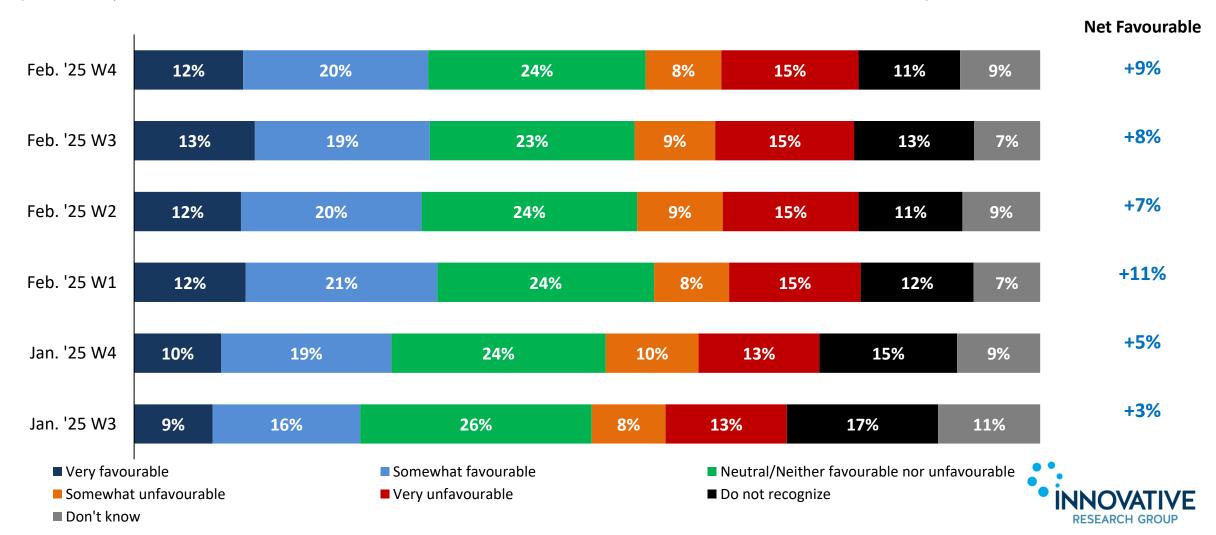
Carney Favourability:

Carney's image is stable with his net favourability is 15 points higher than Poilievre's



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that. – **Mark Carney**

[asked of all respondents; Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W1 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]



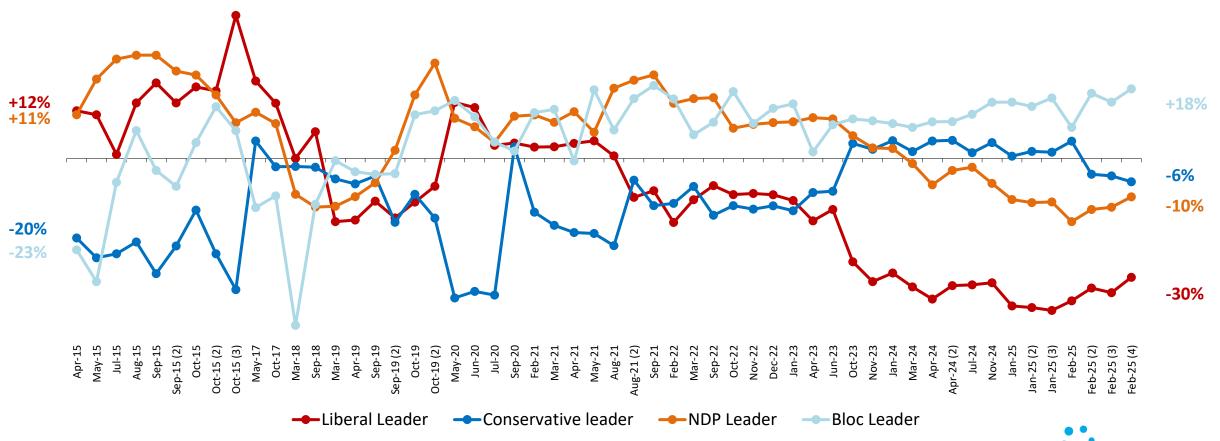
Party Leader NET Favourables Tracking:

Pierre Poilievre remains in negative territory



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=1,000]



Note: Green Leader, People's Party Leader not shown.

Current data: February 2025

Note: Results for Yves-Francois Blanchet (Bloc Leader) shown of Quebec respondents only



Read, Seen, Heard

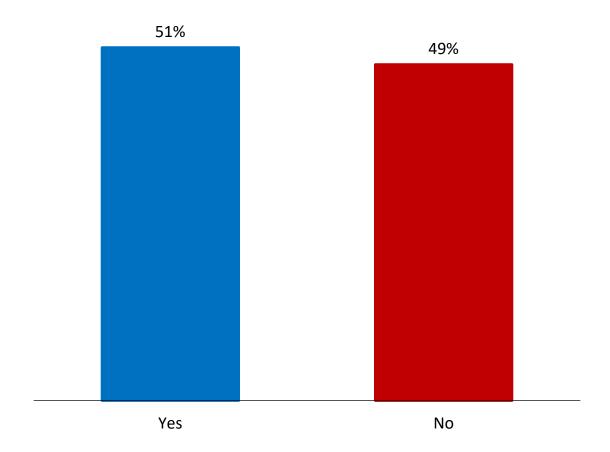
Federal Read, Seen, Heard:

Half of Canadians are following federal government news. More feel more favourable than less favourable



Have you read, seen or heard anything about Canada's Prime Minister and the Federal government in the last few days?

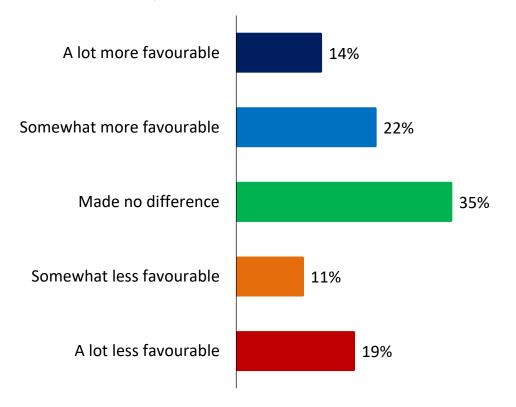
[Asked of all respondents; n=1000]





Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?

[Asked of all respondents; n=512]



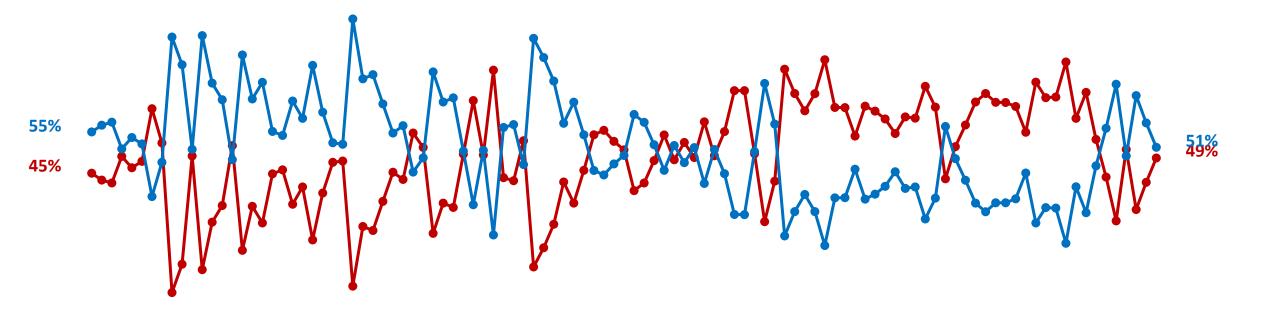


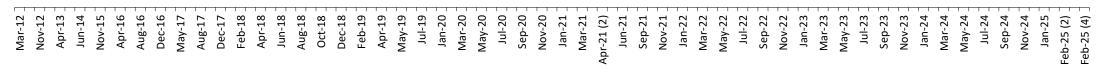
Read, Seen, Heard Tracking:

Attention to Federal government is slipping during the tariff lull

Q

Have you read, seen or heard anything about Canada's Prime Minister and the Federal government in the last few days? [asked of all respondents; n=1000]









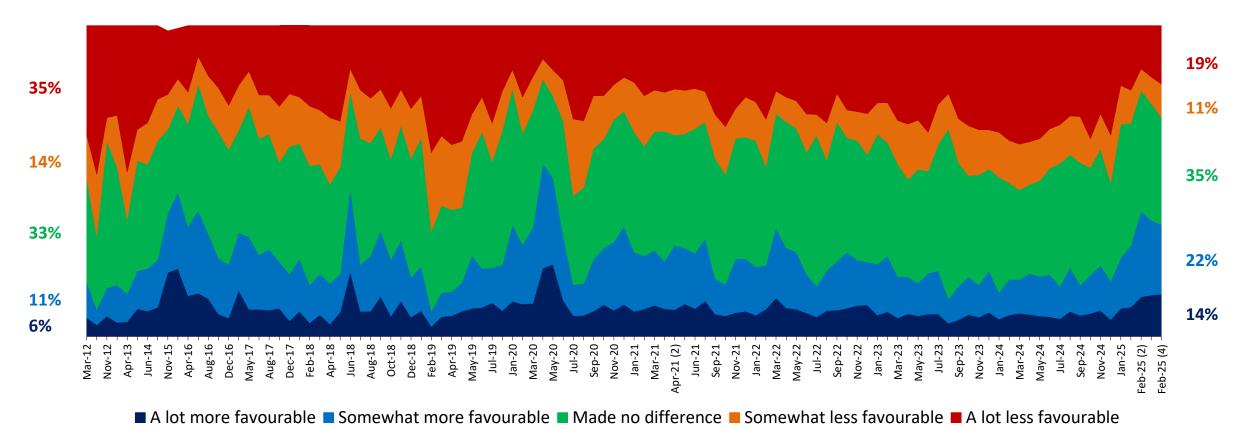
Federal Read, Seen, Heard, Impact Tracking:

Canadians are more favourable than unfavourable after hearing about the gov't for the first time since COIVD

Q

Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?

[asked of those who have RSH; n=512]





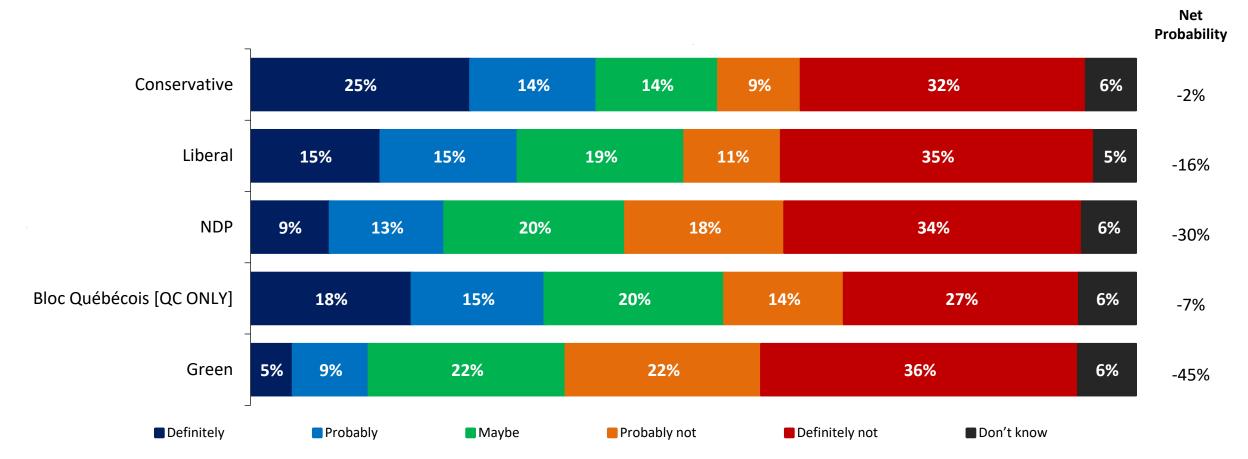
Party Brands What Do We Expect if the Liberals or Conservative Win?

Likelihood to Vote for a Party:

39% likelihood to vote Conservative, 9 points lead over LPC, and 17 points lead over NDP

Q

If a federal election were held today, how likely is it that you would vote for each of the following parties? [asked of all respondents; n=1,000]





Brand attributes: Difference between waves

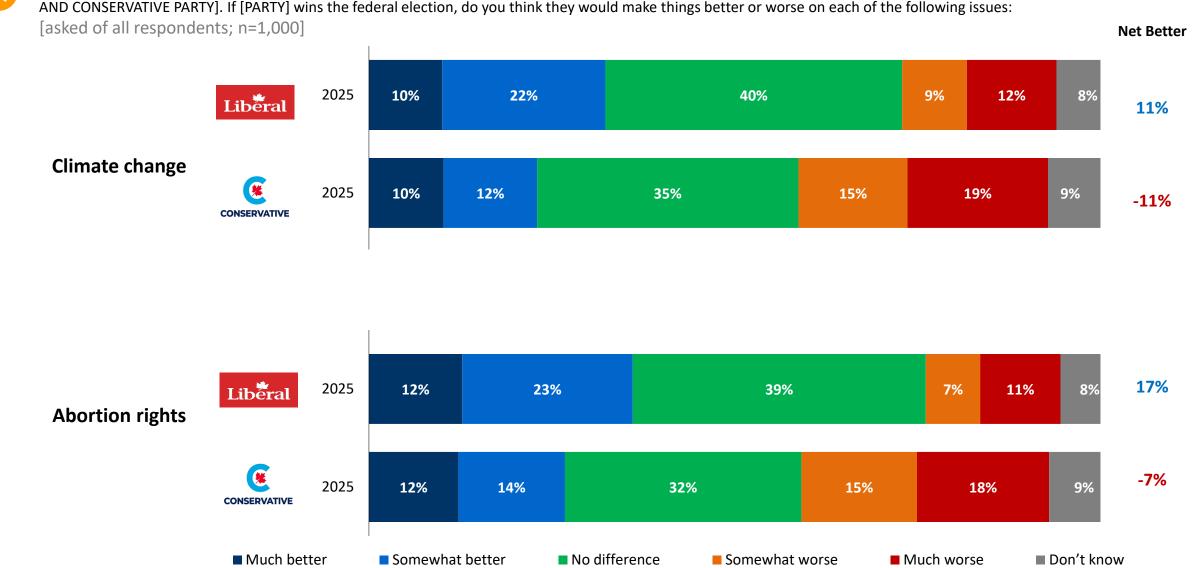
November 2023	May 2024	February 2025	
Climate change	Climate change	Climate change	
Helping people like you get ahead	Helping people like you get ahead	Helping people like you get ahead	
Helping people like you make ends meet	Helping people like you make ends meet	Helping people like you make ends meet	
Gun violence	Crime and public safety	Crime and public safety	
Balancing the budget	Balancing the budget	Balancing the budget	
Women's rights	Abortion rights	Abortion rights	
Making housing more affordable	Making housing more affordable	Making housing more affordable	
		Standing up for Canada against Donald Trump	
		Making Canada stronger to stand up against Donald Trump	

Brand attributes – Liberal Advantage:

Liberals lead on issues of women's rights and climate change

Q

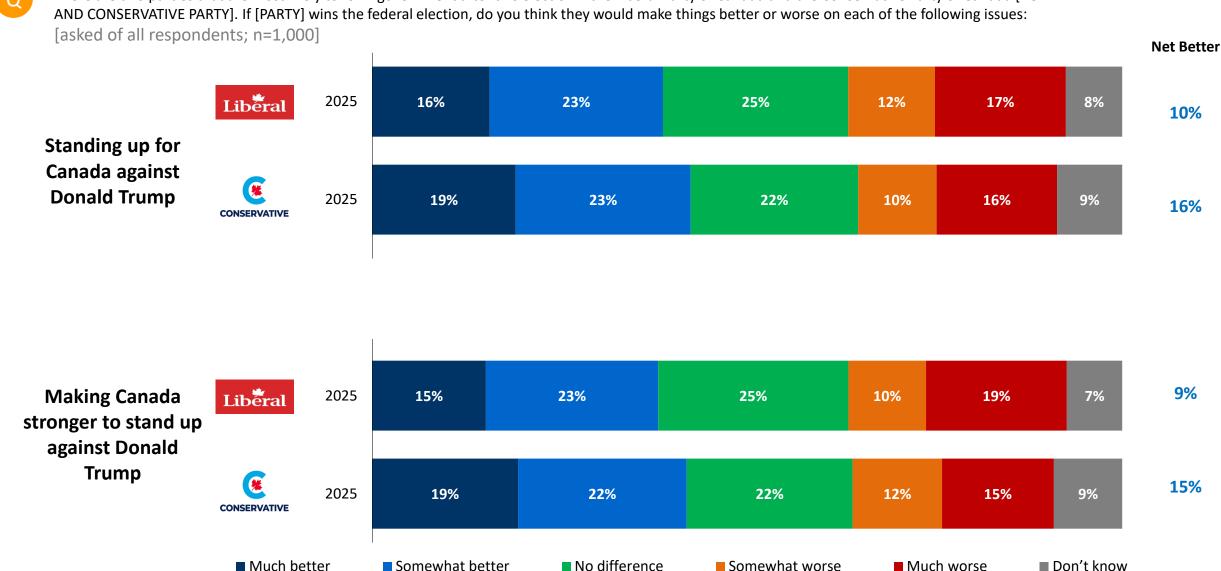
There are two parties that are most likely to form government after this election – the Liberal Party of Canada and the Conservative Party of Canada [ROTATE LIBERAL PARTY AND CONSERVATIVE PARTY]. If [PARTY] wins the federal election, do you think they would make things better or worse on each of the following issues:



Brand attributes – U.S. Canada Relations:

Conservatives currently have an edge on standing up to Donald Trump

There are two parties that are most likely to form government after this election – the Liberal Party of Canada and the Conservative Party of Canada [ROTATE LIBERAL PARTY] AND CONSERVATIVE PARTY]. If [PARTY] wins the federal election, do you think they would make things better or worse on each of the following issues:

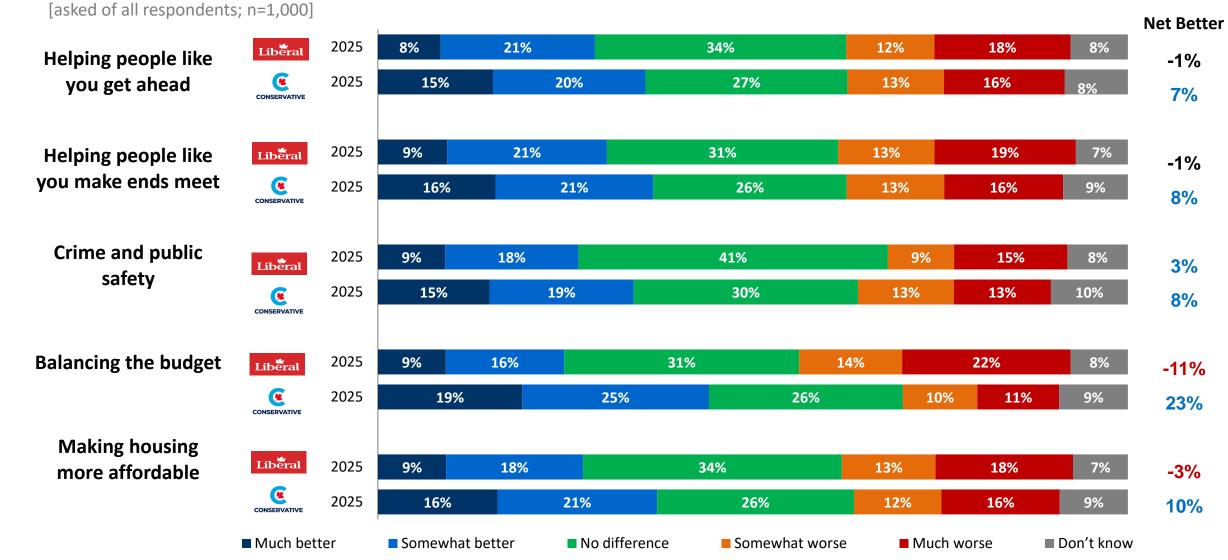


Brand attributes – Conservative Advantage:

Conservatives are recognised as fiscally responsible; Liberals are closing the gap on the cost of living



There are two parties that are most likely to form government after this election – the Liberal Party of Canada and the Conservative Party of Canada [ROTATE LIBERAL PARTY AND CONSERVATIVE PARTY]. If [PARTY] wins the federal election, do you think they would make things better or worse on each of the following issues:

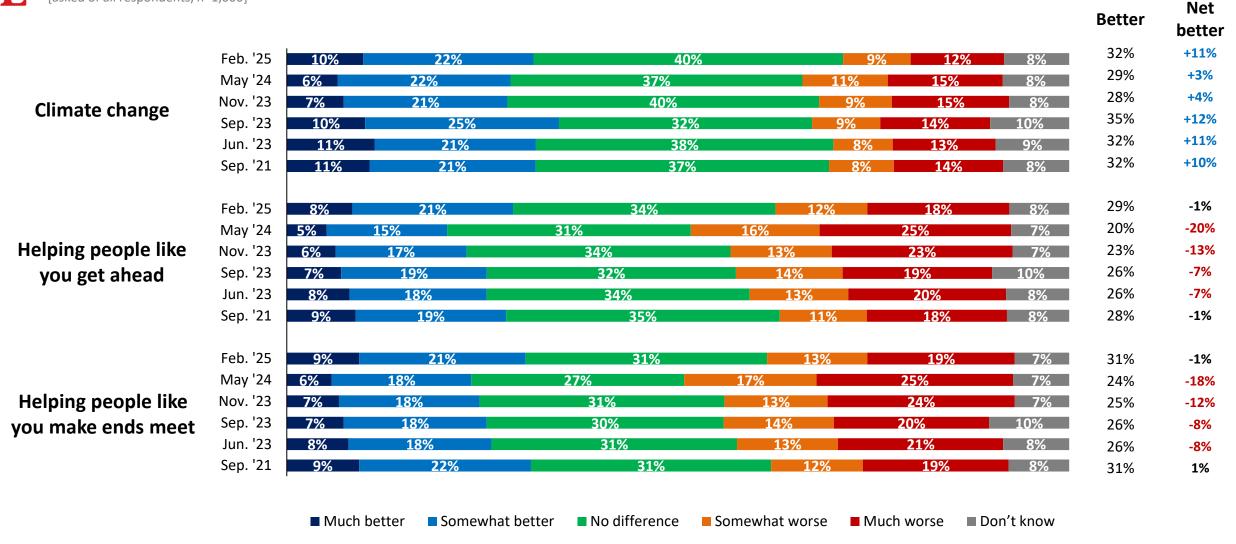


Liberal Brand Promise (Part 1):

The Liberal brand promise is up on all three attributes, but still net positive only on climate change



If the Liberal Party of Canada were to form government, do you think they would make things better or worse on each of the following issues? [asked of all respondents, n=1,000]

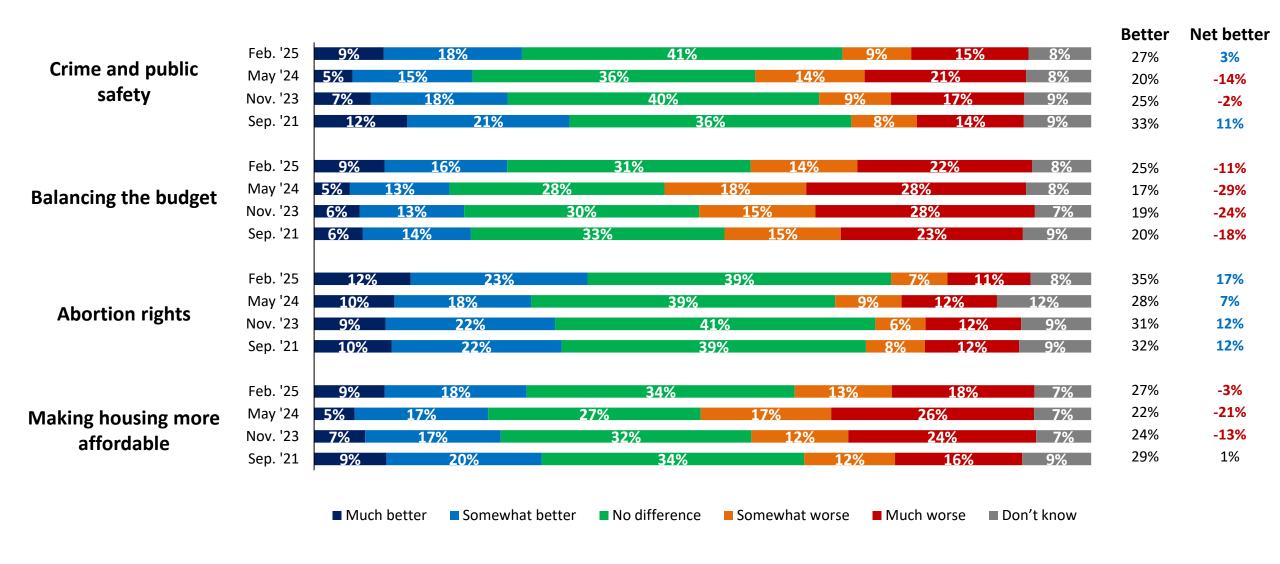


Liberal Brand Promise (Part 2):

Now positive even on 'Gun violence' and only slightly negative on 'Making housing more affordable', the Liberal brand is improving on all issues except balancing the budget



If the Liberal Party of Canada were to form government, do you think they would make things better or worse on each of the following issues? [asked of all respondents, n=1,000]

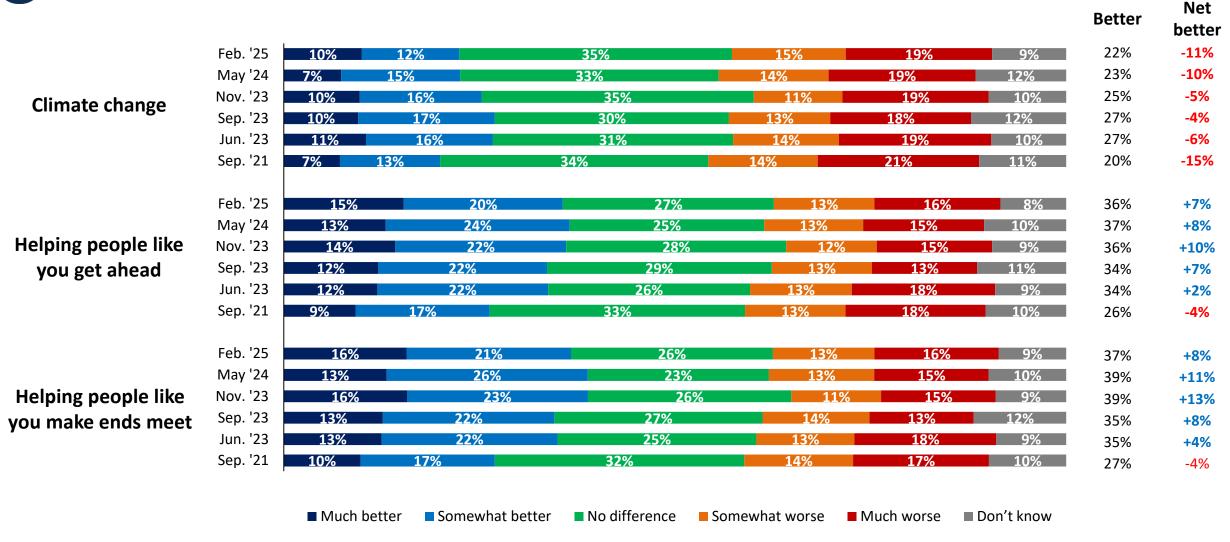


Conservative Brand Promise (Part 1):

Conservative brand positive but stagnant on helping people get ahead and make ends meet, and not improving on climate change



If the Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues? [asked of all respondents, n=1,000]

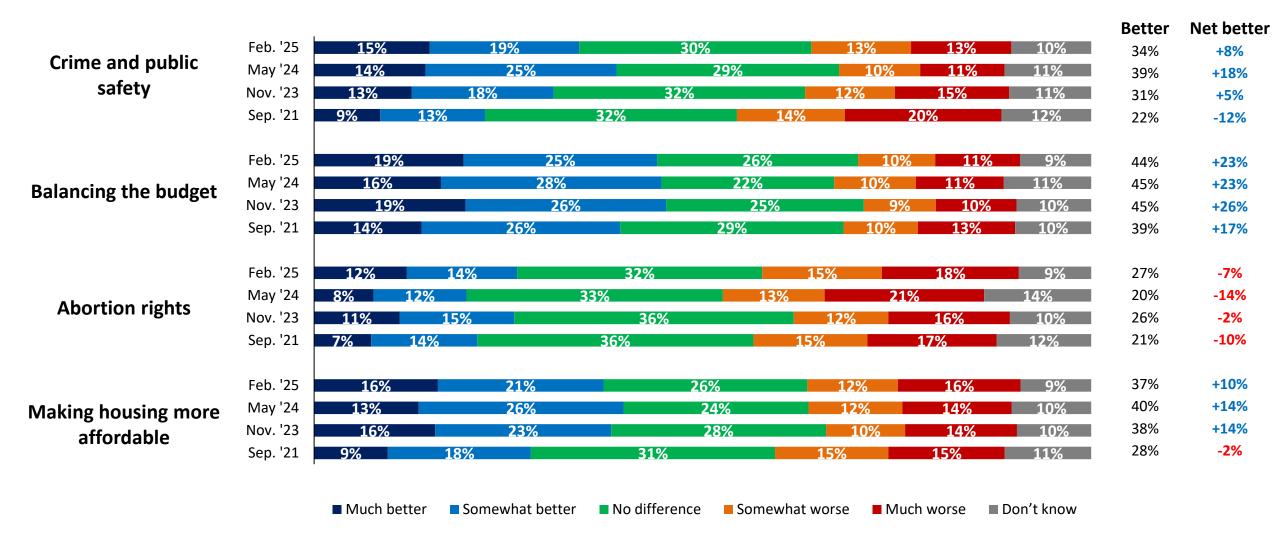


Conservative Brand Promise (Part 2):

The conservative brand up 7 points on abortion, but there is not much movement otherwise



If the Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues? [asked of all respondents, n=1,000]



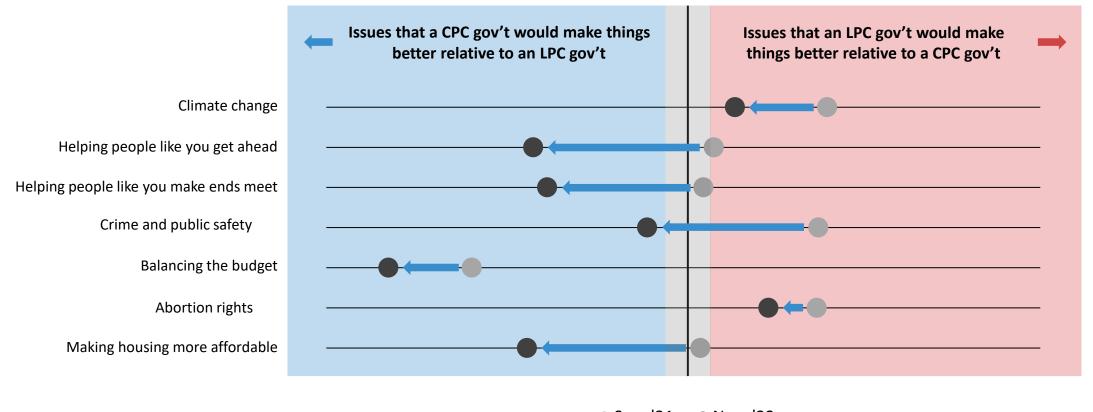
Change in Brand Perception From Sep. '21 to Nov. '23:

In 2023, Conservatives improve on all attributes compared to September '21

Q

If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues... [asked of all respondents, n=2,500]

Difference between 'Net Better' Scores of LPC and CPC



● Sep. '21 ● Nov. '23

Note: 'Net Better' is calculated as the sum of 'Much better' and 'Somewhat better' *minus* the sum of 'Much worse' and 'Somewhat worse'. The distance between the two dots represents the difference between 'Net Better' scores of LPC and CPC.

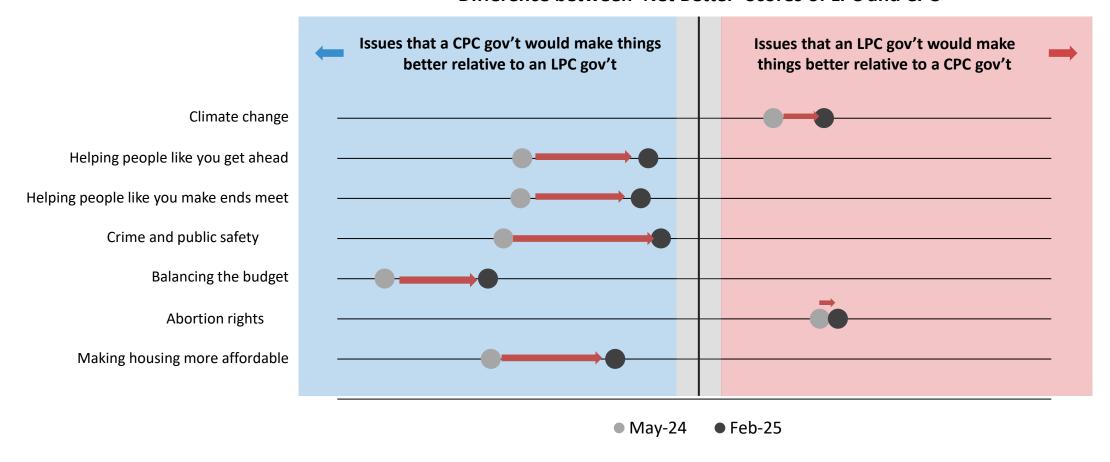
Change in Brand Perception From May. '24 to Feb. '25:

In 2025, Liberals improve on all attributes since May 2024

Q

If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues... [asked of all respondents, n=2,500]

Difference between 'Net Better' Scores of LPC and CPC



Note: 'Net Better' is calculated as the sum of 'Much better' and 'Somewhat better' *minus* the sum of 'Much worse' and 'Somewhat worse'. The distance between the two dots represents the difference between 'Net Better' scores of LPC and CPC.

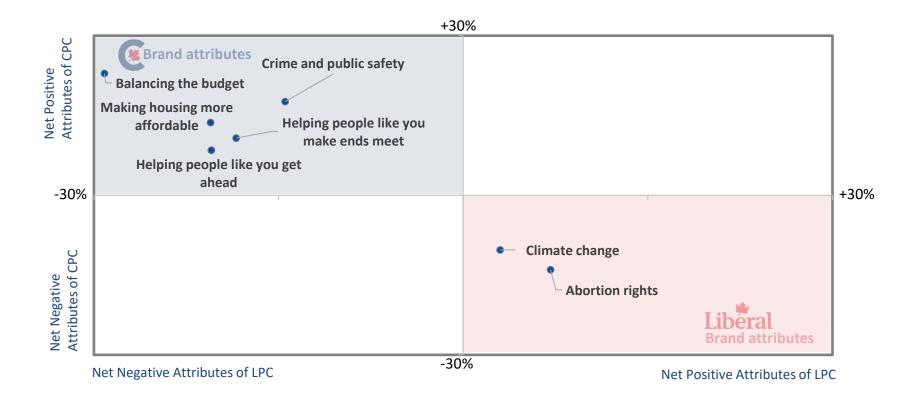
Liberal vs. Conservative Brand – May 2024:

In May 2024, there was a distinct separation between the two brands and what they represent to Canadians

Q

If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues...

[May 2024 data asked of all respondents, n=2,500]



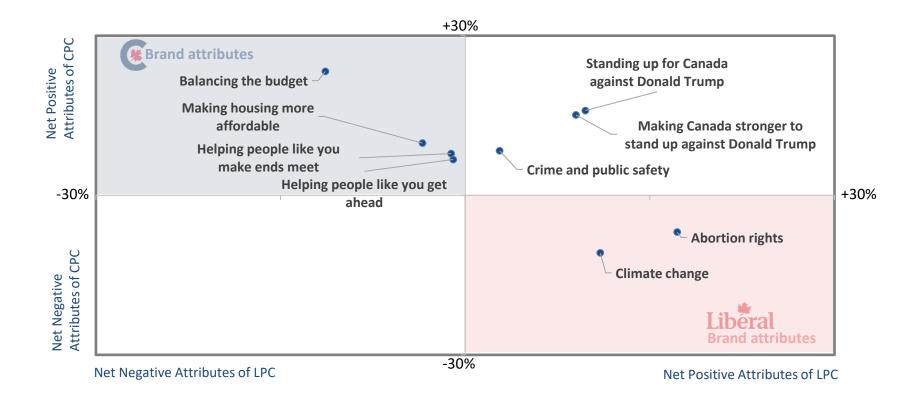
Note: 'Net Better' is calculated as the sum of 'Much better' and 'Somewhat better' *minus* the sum of 'Much worse' and 'Somewhat worse'. "Brand attributes" are attributes with a Net Better score that is positive for one brand and negative for the other.

Liberal vs. Conservative Brand – Nov. 2025:

The Conservative edge on affordability erodes while crime joins Trump attributes as strong for both parties

Q

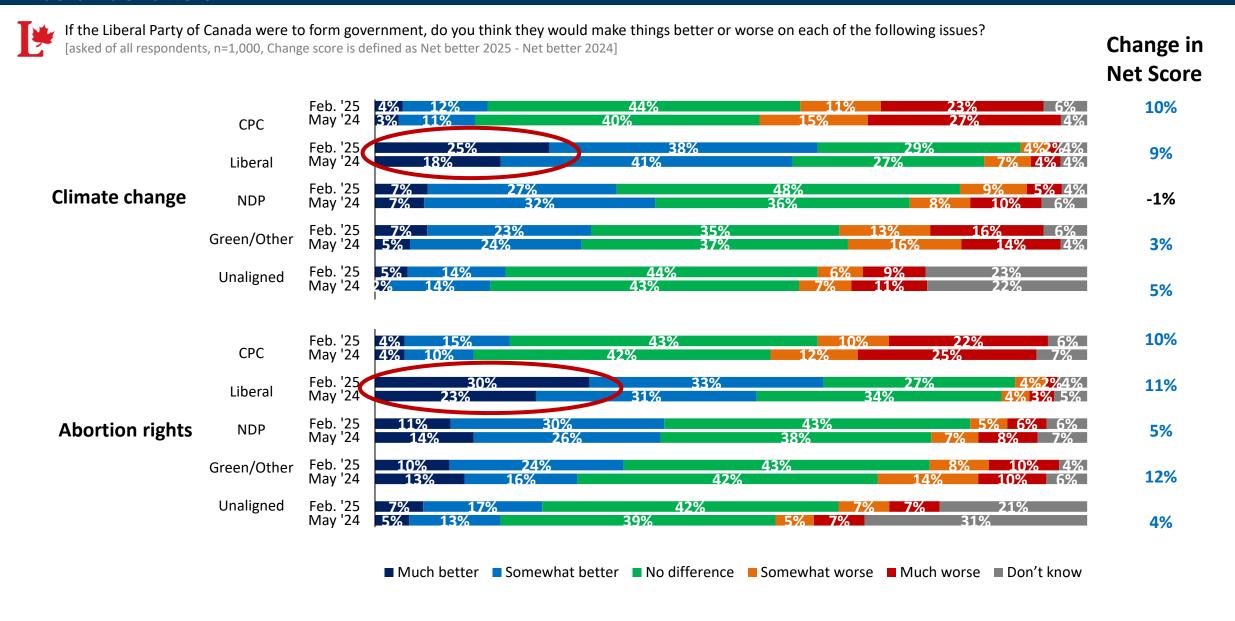
If the Liberal/Conservative Party of Canada were to form government, do you think they would make things better or worse on each of the following issues... [Feb 2025 data asked of all respondents, n=1000]



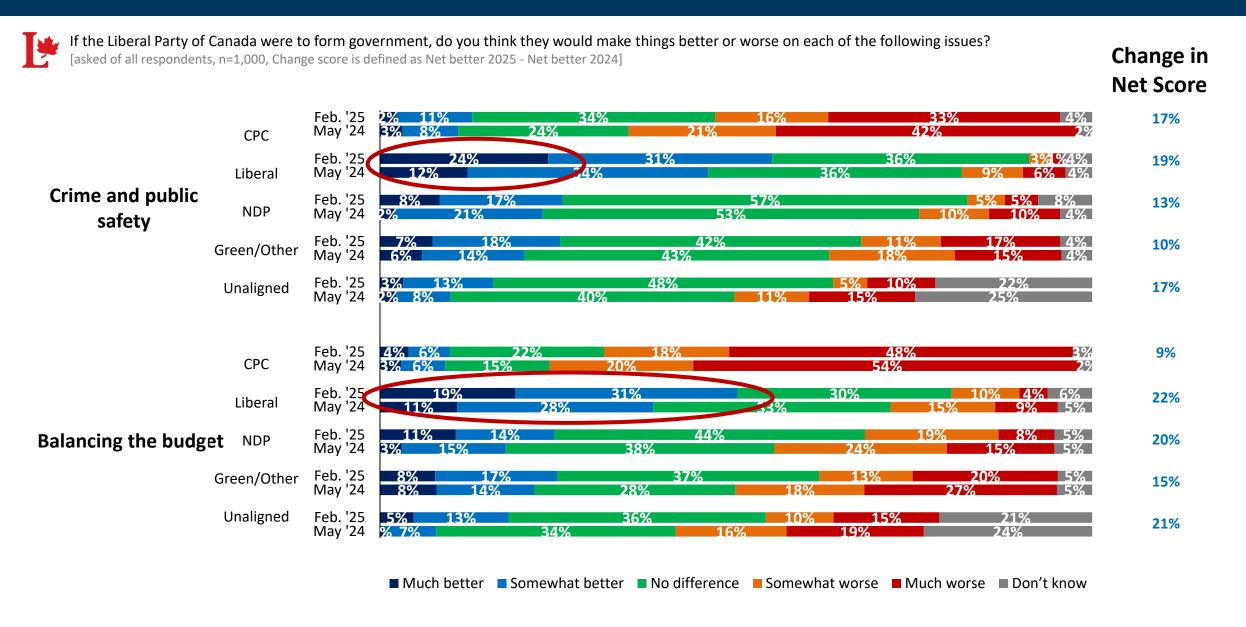
Note: 'Net Better' is calculated as the sum of 'Much better' and 'Somewhat better' *minus* the sum of 'Much worse' and 'Somewhat worse'. "Brand attributes" are attributes with a Net Better score that is positive for one brand and negative for the other.

Which Voters Are Driving the Liberal Brand Recovery?

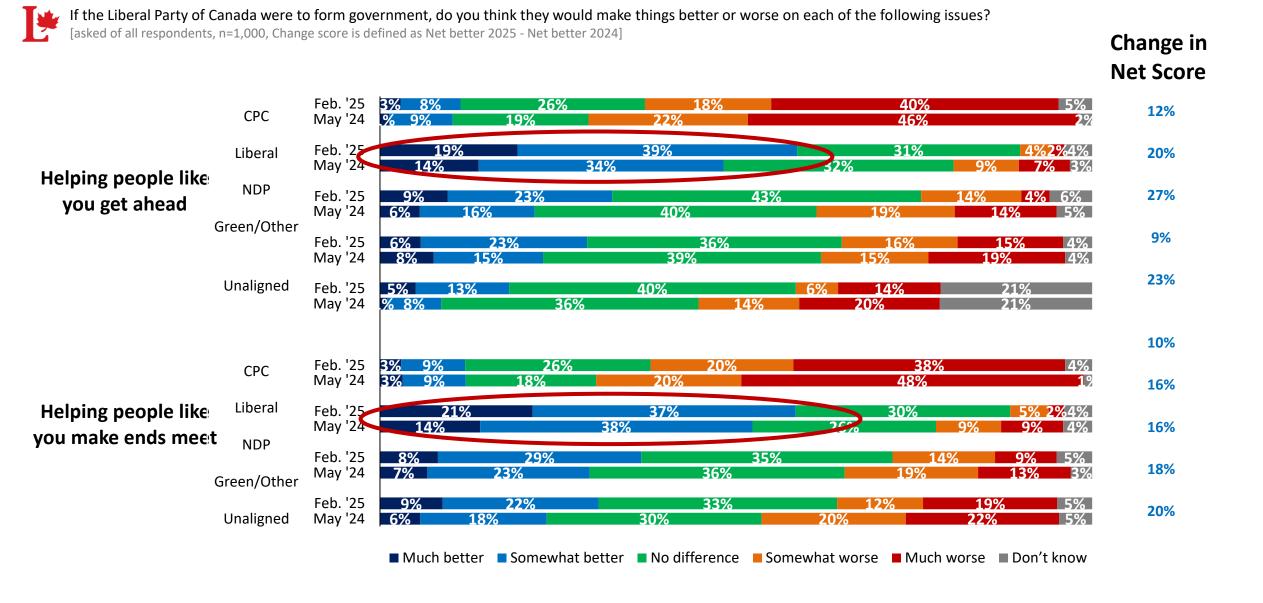
Climate change and abortion rights are strong Liberal brand attributes that have improved particularly among Liberal identifiers



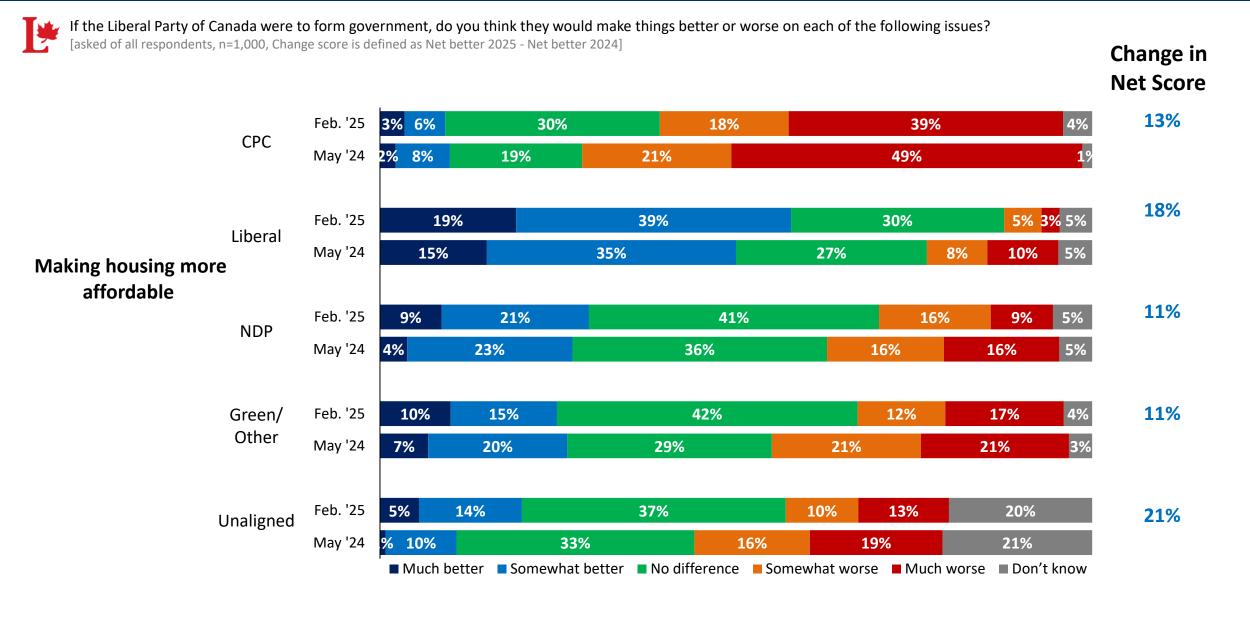
Liberals also improve particularly within their base on balancing the budget and crime and public safety



Cost of living brand attributes have also improved from last year across all party lines



Making housing more affordable also improved from last year across all party lines



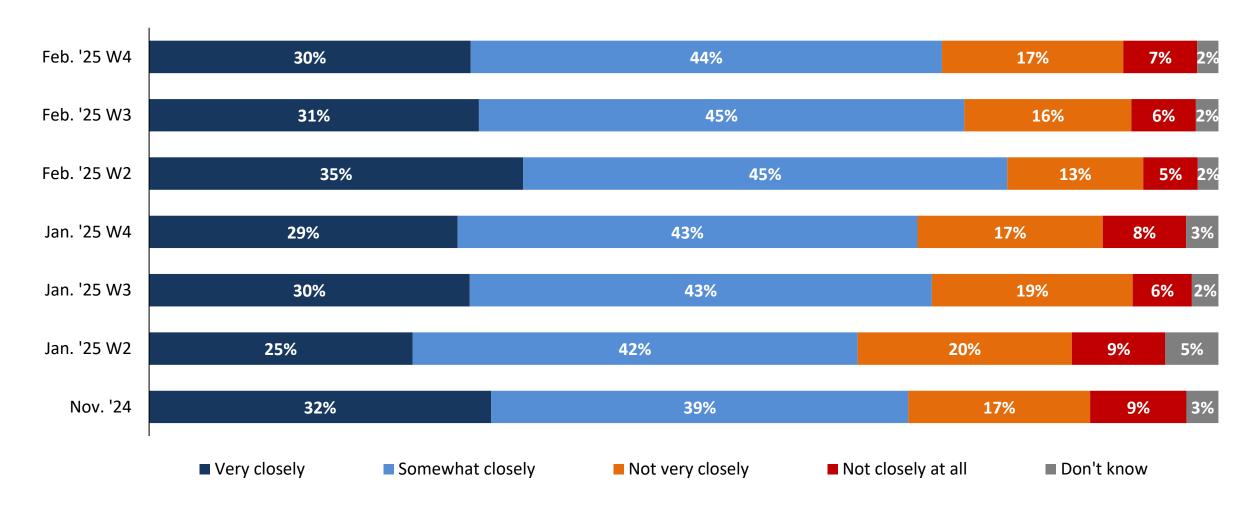
Reaction to Trump

Engagement with US-Canada Relationship:

Engagement with U.S.-Canada relations is down marginally, 2 points down and close to late January levels

Q

How closely are you following the news about the relationship between Canada and the US now Donald J. Trump is the President of the United States once again? [asked of all respondents, Nov. '24-Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000]



Note: Question wording in Jan. '25 W3 and Nov.'24 was "How closely are you following the news about Donald J. Trump becoming the President of the United States?" Question wording in Jan. '25 W4 was "How closely are you following the news about the relationship between Canada and the U.S. now that Donald J. Trump is becoming the President of the United States?"

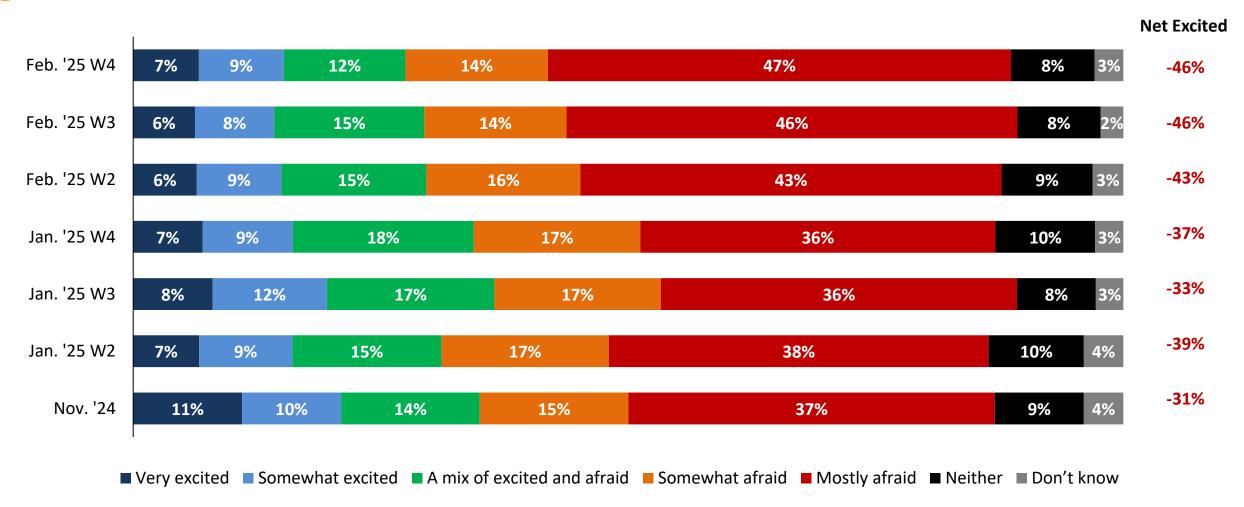
Attitude Towards President-Elect Trump:

Fear of Trump's presidency remains stable; 61% of Canadians report being afraid

Q

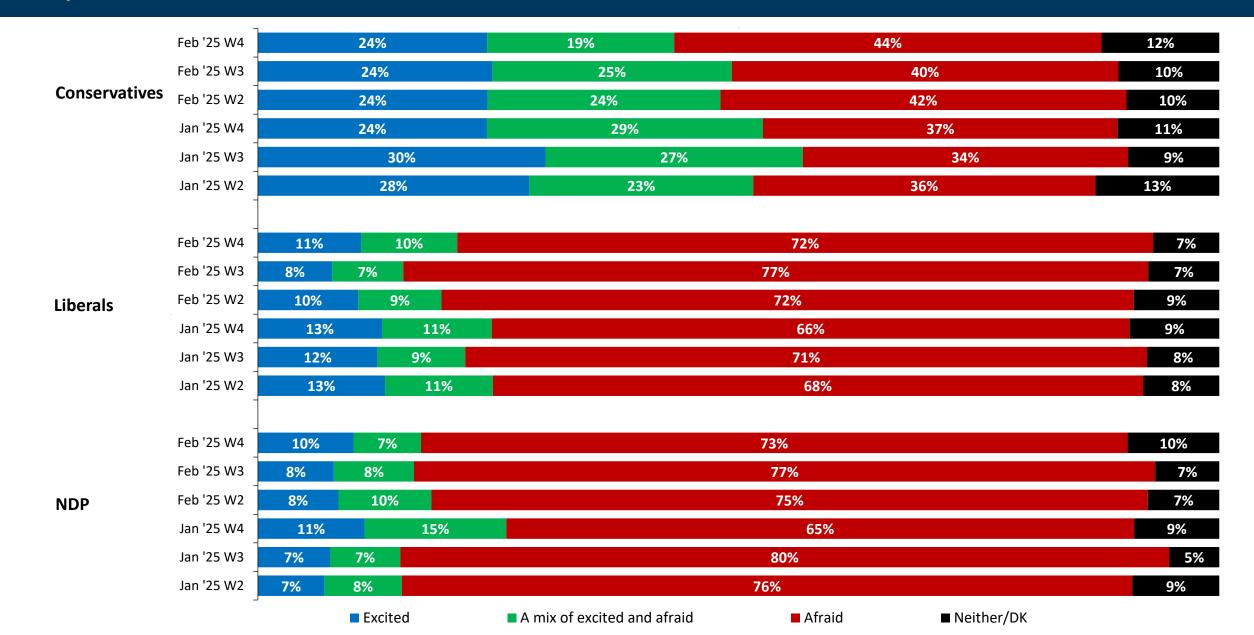
Does Donald J. Trump's election as the US President leave you feeling excited or afraid?

[asked of all respondents, Nov. '24-Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]



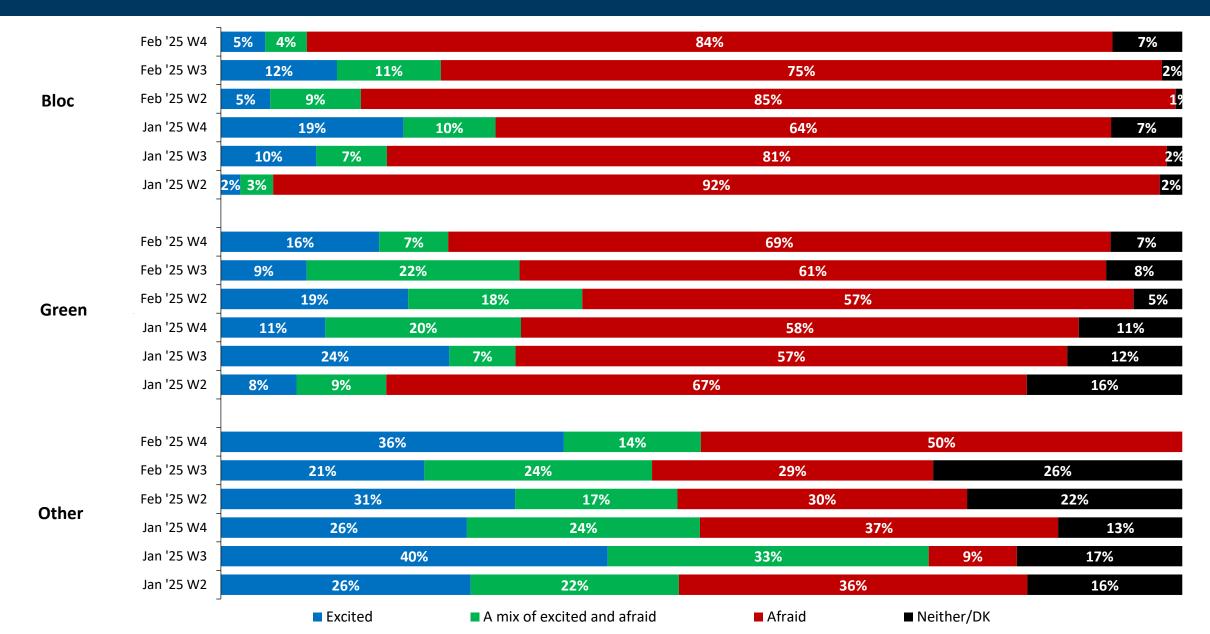
Attitude Towards President-Elect Trump BY Decided Vote (Part 1):

Trump leaves Conservatives more afraid than excited



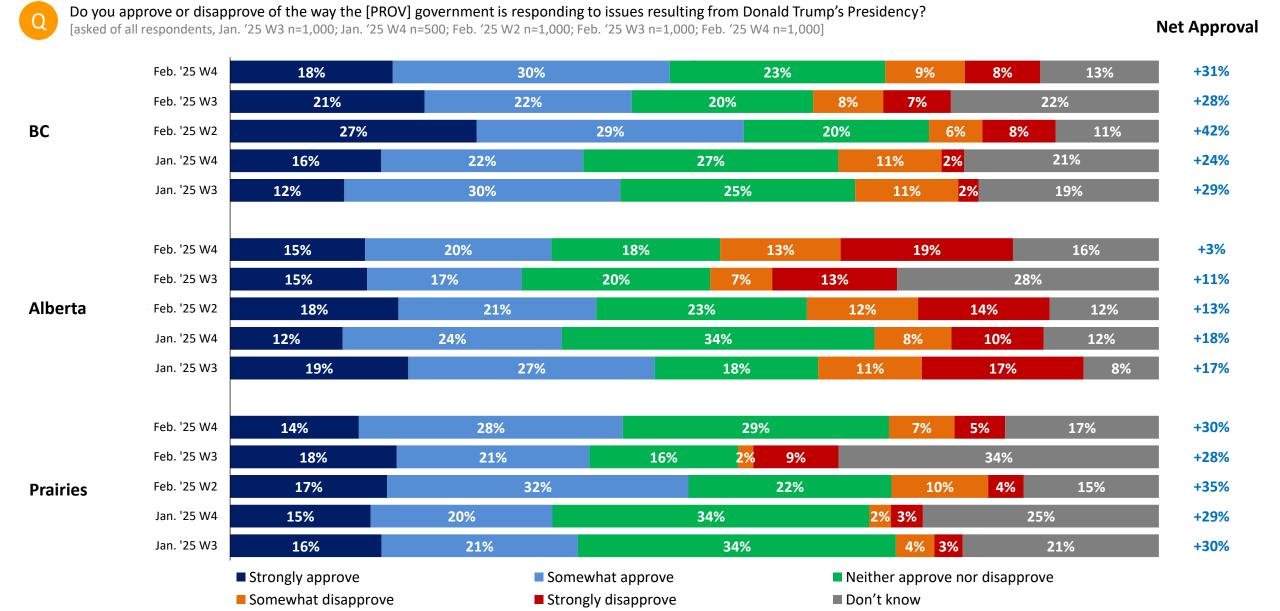
Attitude Towards President-Elect Trump BY Decided Vote (Part 2):

All-time low excitement among Liberal partisans about Trump



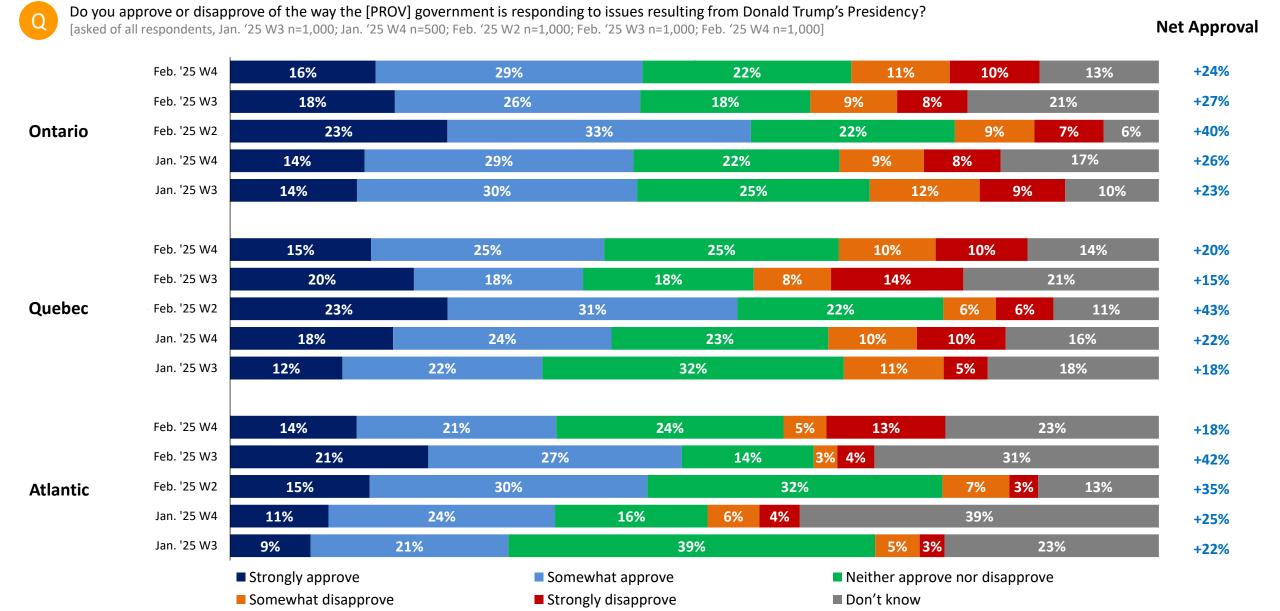
Provincial Leadership Approval:

BC and Prairies see slight net approval increases for provincial response to Trump, while Alberta drops 8 points



Provincial Leadership Approval:

The Atlantic government's net approval drops 14 points, while Quebec's rises 5



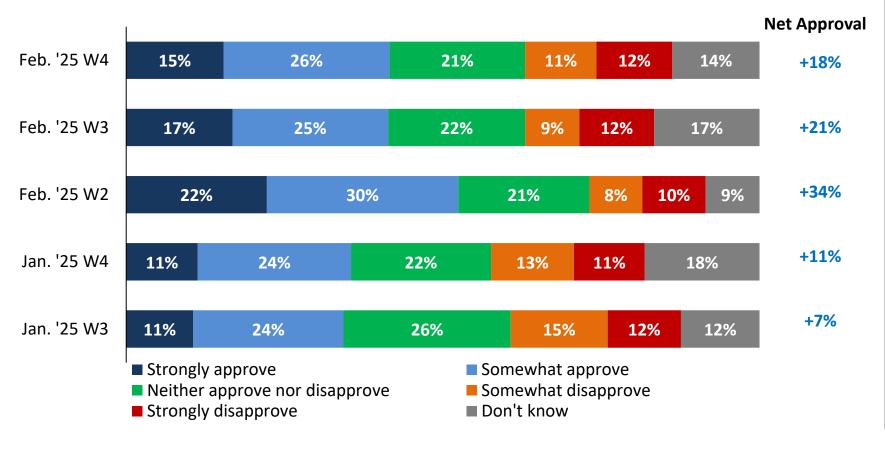
Federal Leadership Approval:

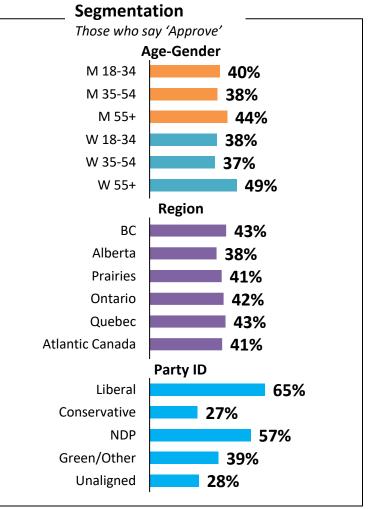
Net approval drops by 16 points since week 2; highest approval among Liberal voters

Q

Now thinking about the federal government do you approve or disapprove of the way the Federal government is responding to issues resulting from Donald Trump's presidency?

[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]







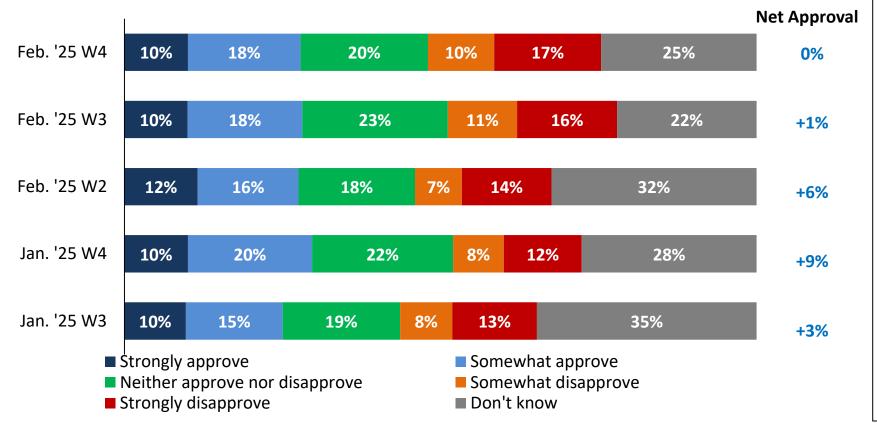
Pierre Poilievre and the Conservatives' Approach:

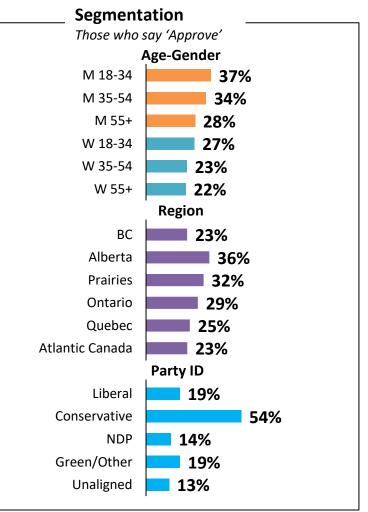
Net approval remains constant; Poilievre and the Conservative's approach to Trump's presidency is polarizing, with 1-in-4 approving (28%) and disapproving (27%) of it



Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency?

[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]





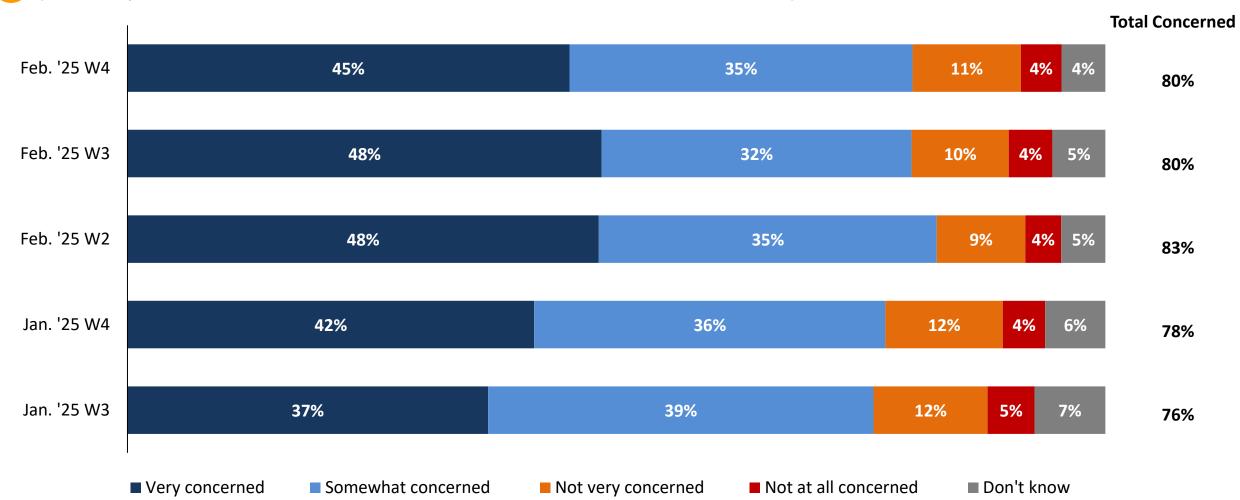


Responding to Tariffs

Canadians' Concern About Tariffs:

Concern over Trump's tariffs remains steady at 80%, increasing marginally since they were announced.





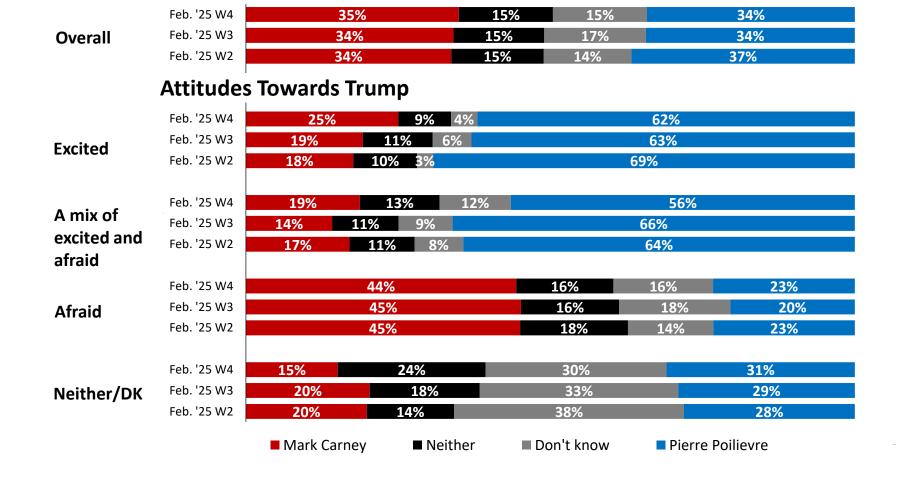
Best Leader for Canada-US Relations:

Carney and Poilievre are both seen as equally equipped to handle Canada-U.S. relations; among those excited, Poilievre's approval about Trump is on par with last week, but Carney's approval is up 6 points

Q

Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency? BY ATTITUDE TOWARDS TRUMP [asked of all respondents, Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]



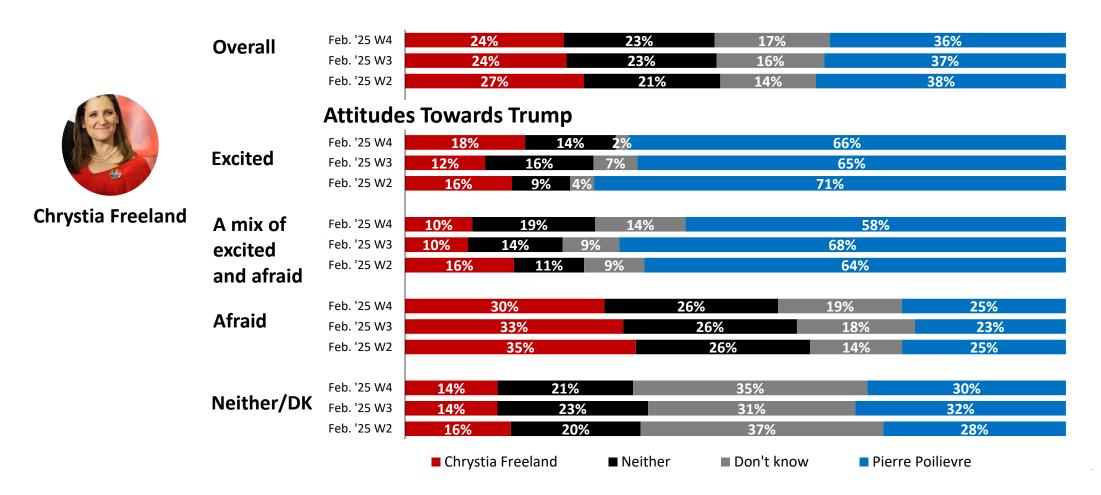




Best Leader for Canada-US Relations:

Among those excited, belief that Freeland can handle Trump's renewed presidency increases 6 points while it remains consistent for Poilievre since last week

Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency? BY ATTITUDE TOWARDS TRUMP [asked of all respondents, Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000]





Pierre Poilievre

Methodology

Survey Methodology:



These are the results of an online survey conducted between February 19th and February 24th, 2025.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=1789 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

Field Dates: February 19th and February 24th, 2025.

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data, in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	220	12.3%	136	13.6%
Men 35-54	265	14.9%	159	15.9%
Men 55+	359	20.1%	189	19.0%
Women 18-34	233	13.1%	133	13.4%
Women 35-54	305	17.1%	165	16.6%
Women 55+	402	22.5%	214	21.5%
British Columbia	191	10.7%	139	13.9%
Alberta	194	10.9%	112	11.2%
Prairies	119	6.7%	65	6.5%
Ontario	917	51.4%	386	38.6%
Québec	254	14.2%	230	23.0%
Atlantic	114	6.4%	67	6.7%

For more information, please contact:

Greg Lyle

President

(t) 416-642-6429

(e) glyle@innovativeresearch.ca

Building Understanding.

