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Canada This Month
Federal Election

Table of Contents

Study Overview

Building from findings off previous waves, this report tracks:

- **Federal vote intentions**

- **Federal leadership**

- **Campaign momentum**

- **Reactions to Trump and tariff**

- **Approval of CPC as well as Provincial and Federal responses to Trump**

Survey Methodology

The findings in this survey report are based on an online survey sponsored and conducted by Innovative Research Group Inc.
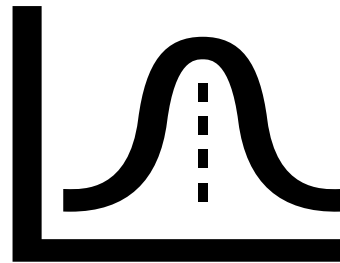
WHO
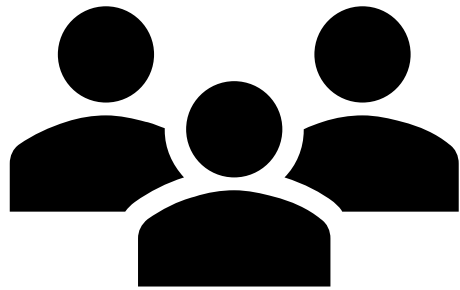
Canadian adults, 18 years or older.

Survey conducted in both French and English.

SAMPLE
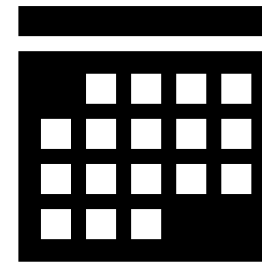
Unweighted sample of 1,548 respondents. Weighted nationally to 1,000 respondents based on 2021 Census data from Statistics Canada.
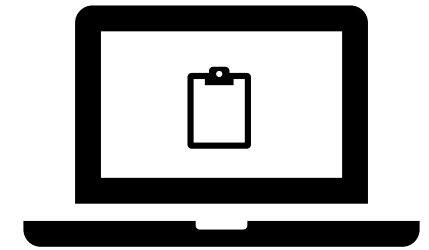
Sample weighted by age, gender, region, education, and self-reported federal past vote.

DATE

March 19th to March 21st, 2025

METHOD

Online survey from representative online panels.

Survey conducted in both French and English.

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Summary

1 **Mark Carney and the Liberals have maintained their momentum**. More than 6-in10 Canadians are paying attention. They are almost twice as likely to more favourable than less favourable as a result of what they hear. As a result, Carney's net favourability reached a new high of +12 and he leads as best PM at 34%, a 7-point lead over Poilievre.

2 **Poilievre continues to struggle.** Poilievre and the CPC only reached 45% of Canadians this week. They lost ground with those people as 40% felt less favourable and only 32% more favourable. Poilievre's net net favourability fell to -9 points.

3 **The Liberals now hold a narrow 2-point lead over the CPC**. Liberals support comes from across the spectrum. They have not only lead the 3 centre left clusters, they lead the CPC among Deferential Conservatives and are within 4-points of the CPC among Pay-as-you-go Moderates. The CPC are only dominant among Populist Conservatives.

4 **The Liberals are now building significant regional strength in Eastern Canada (Ontario, Quebec, and Atlantic Canada.** In Quebec, Liberals lead the Bloc by 3 points. Outside of Quebec, Conservatives hold a narrow 3-point lead.

5 **While the Bloc remains strongly in contention in Quebec, the NDP are in serious difficulty with only 13% of the vote.** The NDP have only 19% of the vote among the Core Left.

Key Voter Segments

Federal Party ID (Quebec vs. ROC): Liberals lead in Quebec over Bloc by 3 points; Conservatives hold a 3-point lead over Liberals in the rest of Canada

Party ID: Quebec

[Respondents in Quebec; n=230]

Conservative	Liberal	NDP	Bloc	Other	Unaligned
14%	27%	6%	24%	9%	19%
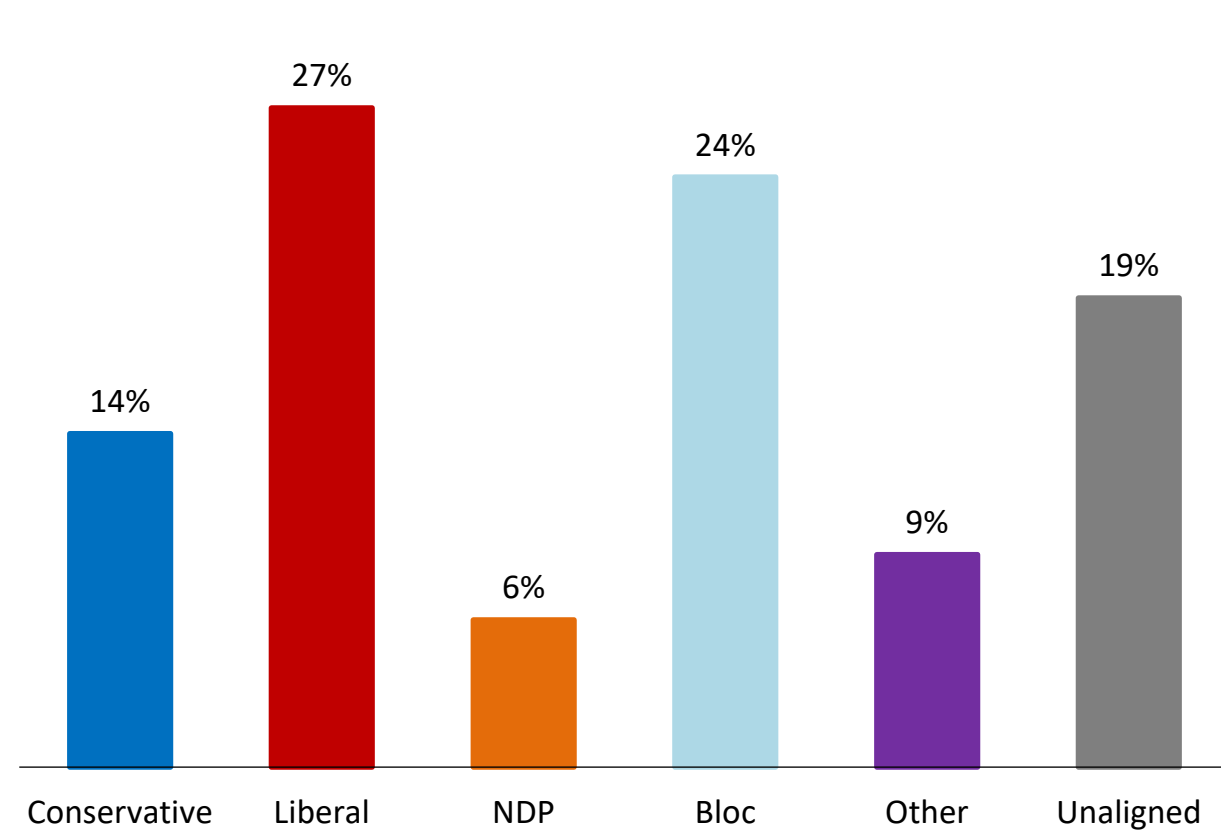
Party ID: Rest of Canada

[Respondents in the rest of Canada; n=770]

Conservative	Liberal	NDP	Other	Unaligned
30%	26%	13%	9%	22%

Current data: March 2025

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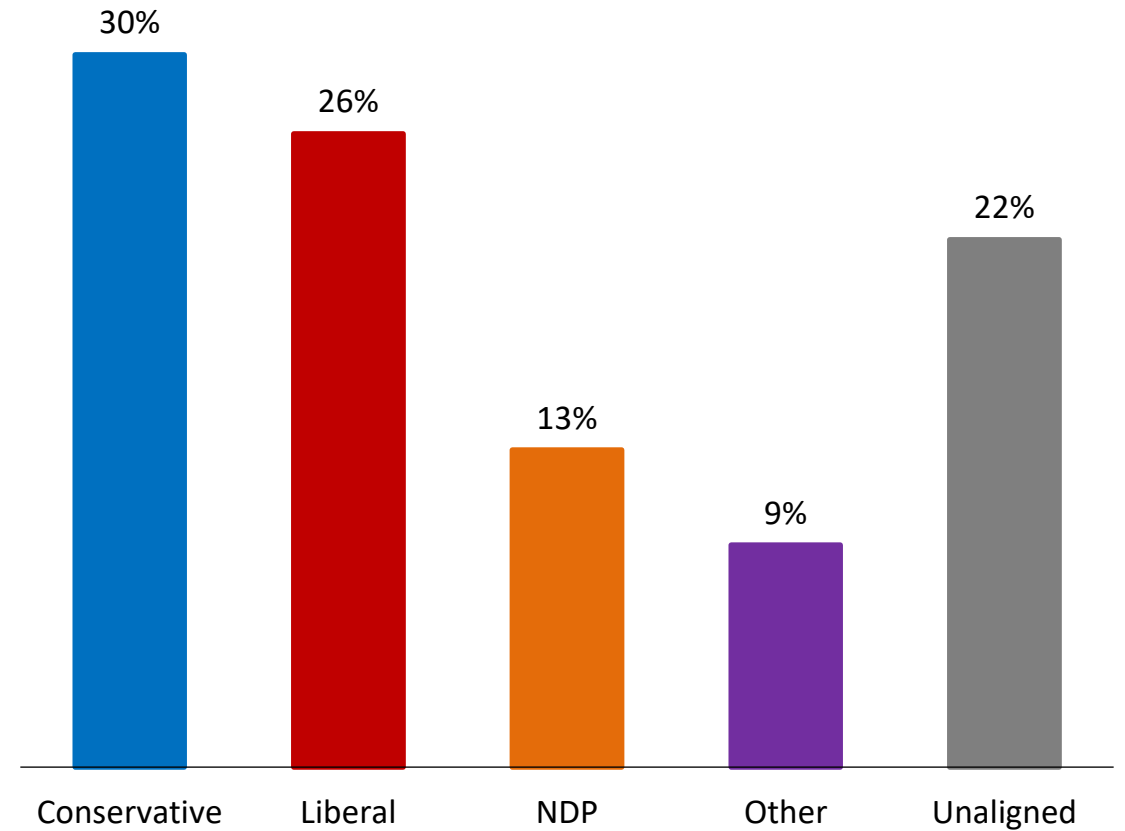
Value Clusters:

Business Liberals representation (24%) about the same as both Conservative segments combined

Q 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]

Pay-as-you-go Moderates 19%

Populist Conservatives 12%

Deferential Conservatives 11%

Business Liberals 24%

Left Liberals 17%

Core Left 18%

Current data: February 2025

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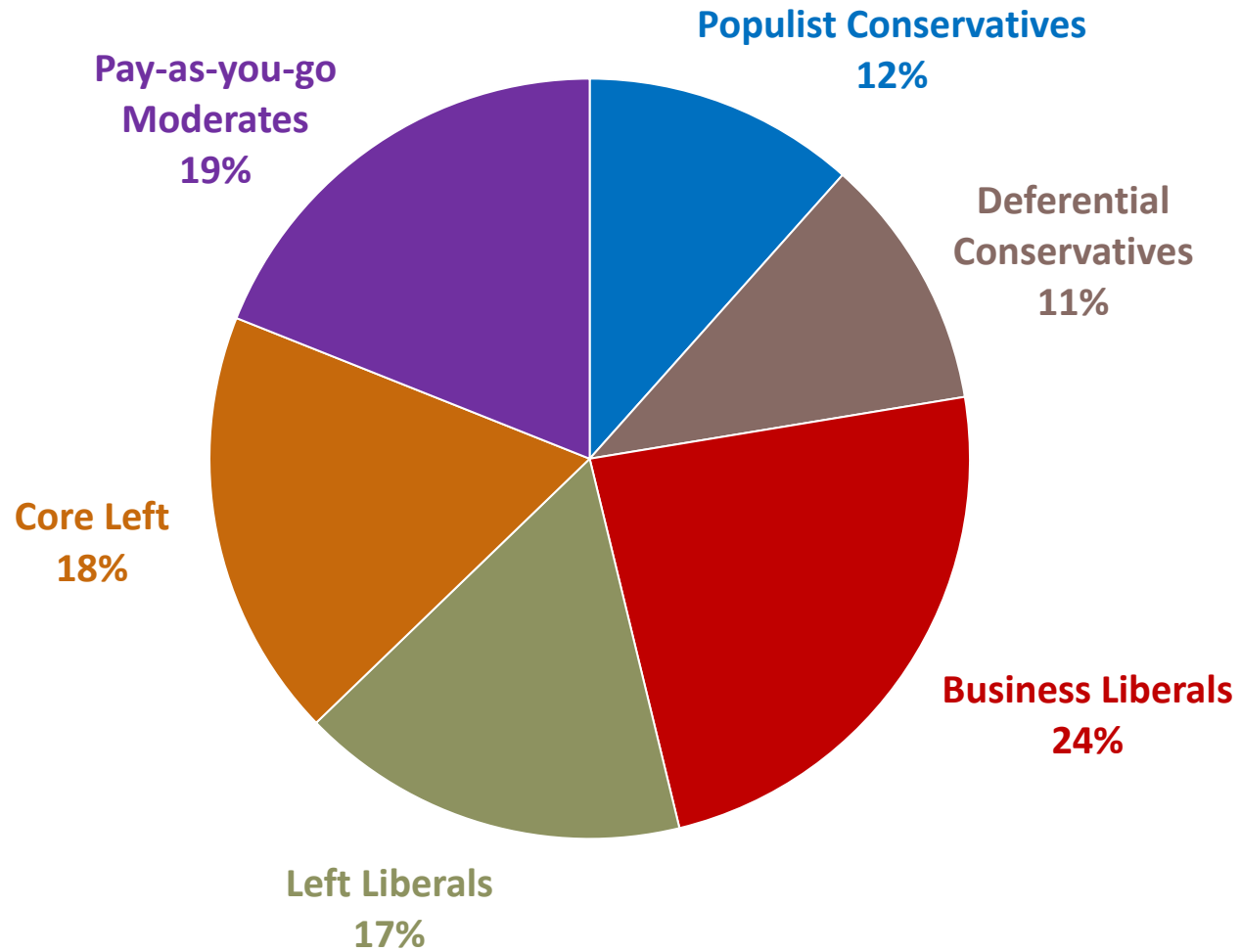
Time for Change

Time for Change Tracking: Agreement on 'Time for a change' has remained stable since the beginning of March; as of W3, 66% of Canadians are in agreement

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]

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know

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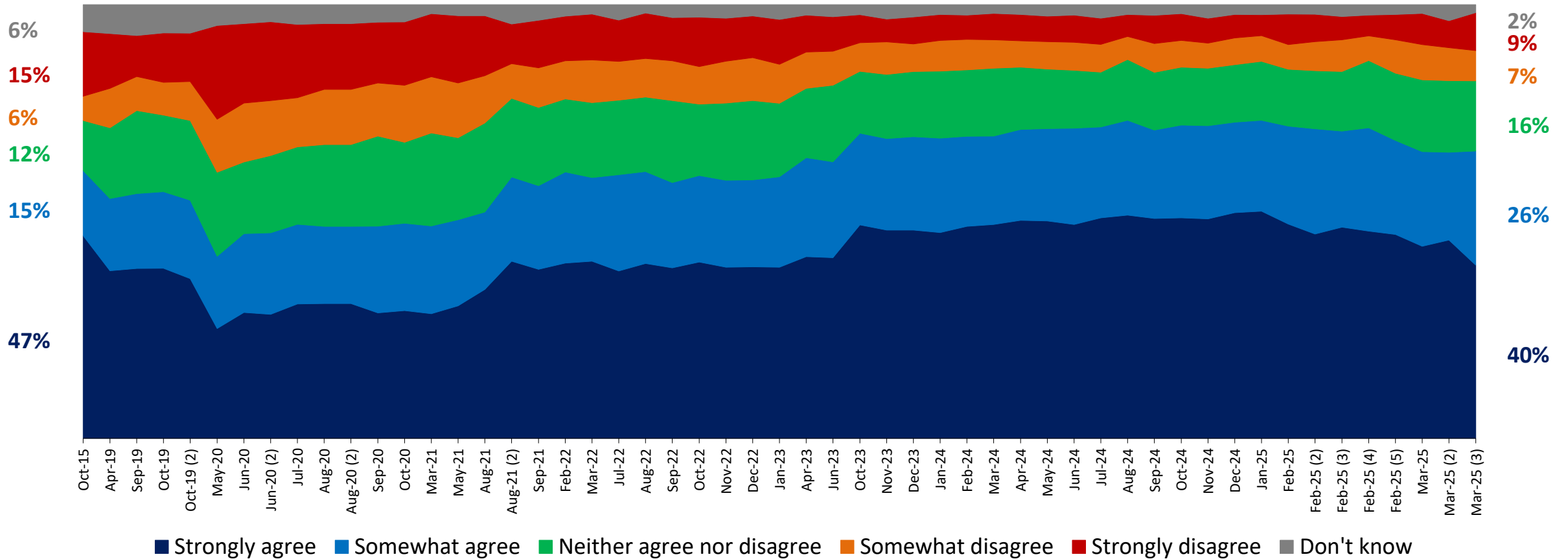
Liberals Best Party Tracking: Agreement among those who believe the Liberals are the best party has remained stable since the W2 of March, following a consistent rise that began in February

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]

Legend: Strongly agree · Somewhat agree · Neither agree nor disagree · Somewhat disagree · Strongly disagree · Don't know

Left axis values: 5%, 37%, 11%, 16%, 14%, 17%

Right axis values: 4%, 25%, 10%, 19%, 22%, 20%

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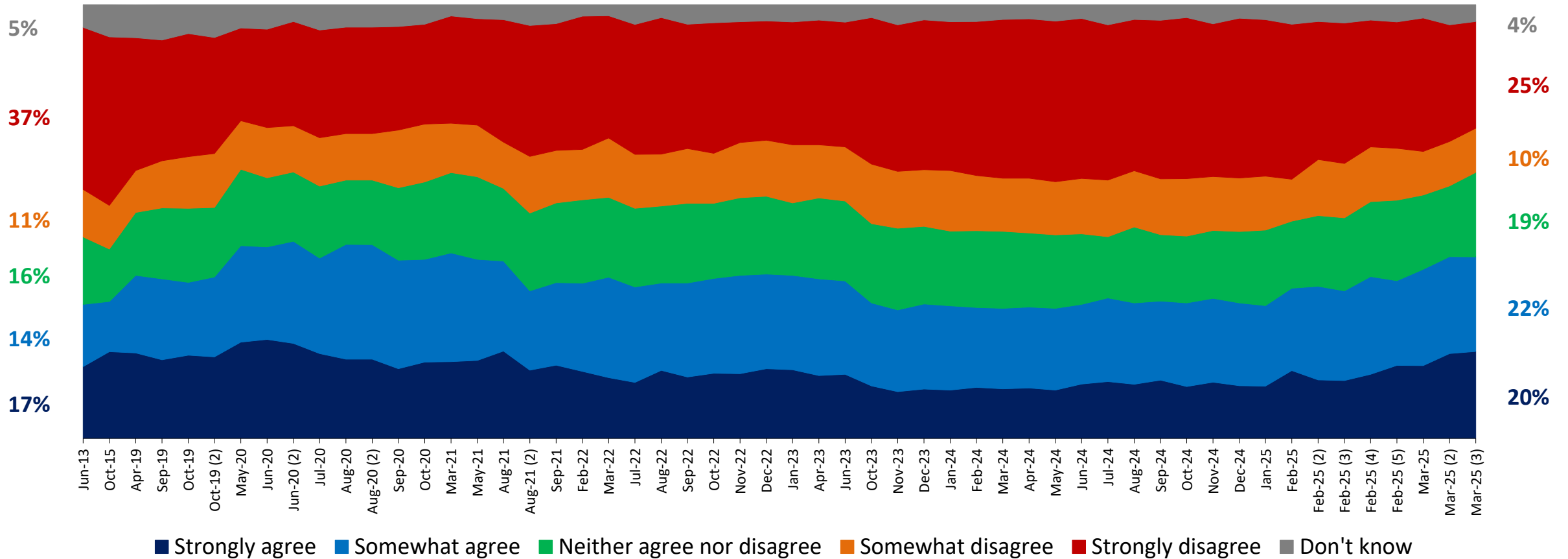
Time for Change Segmentation:

At 27%, soft anti-LPC Liberals are the key voter segment, followed by Hostile at 22%

Q 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]

Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
14%	10%	19%	9%	27%	22%

Current data: March 2025

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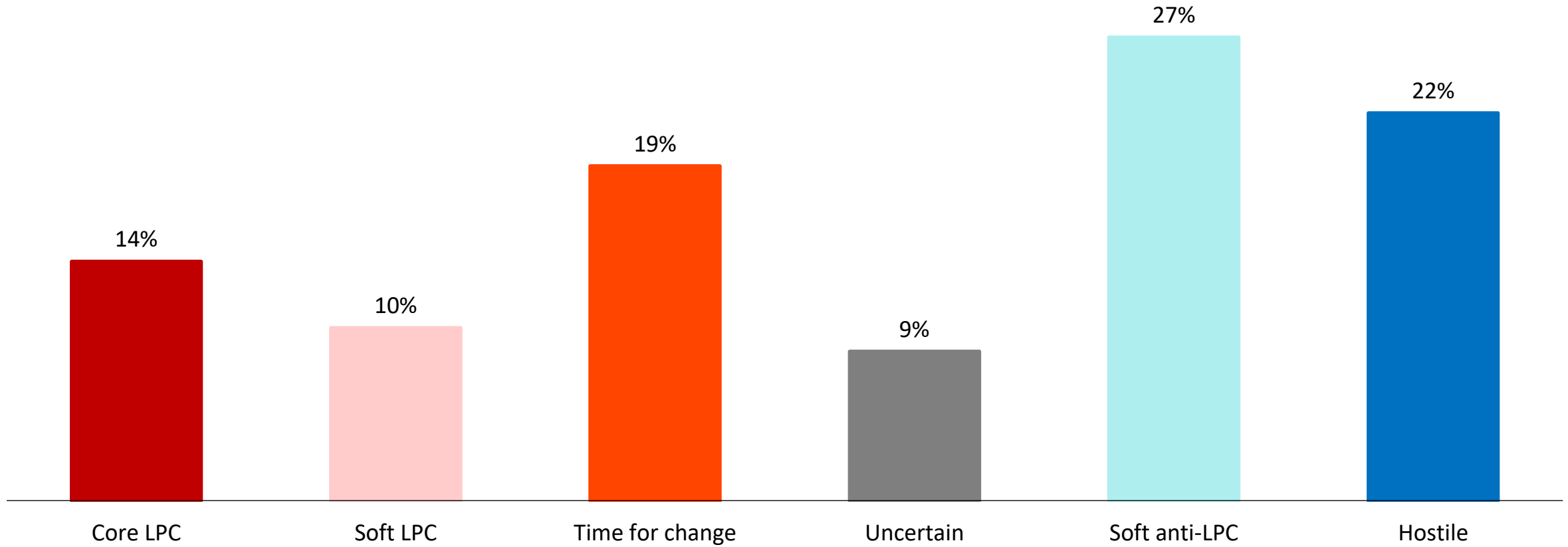
Federal Vote

Federal Decided Vote Tracking: Conservatives continue to decline down to 34%; Liberals have now taken the lead in the decided vote at 36%

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]**
[only decided voters; n=888]

Legend: Conservative, Liberal, NDP, Bloc, Green, Other

Current data: March 2025

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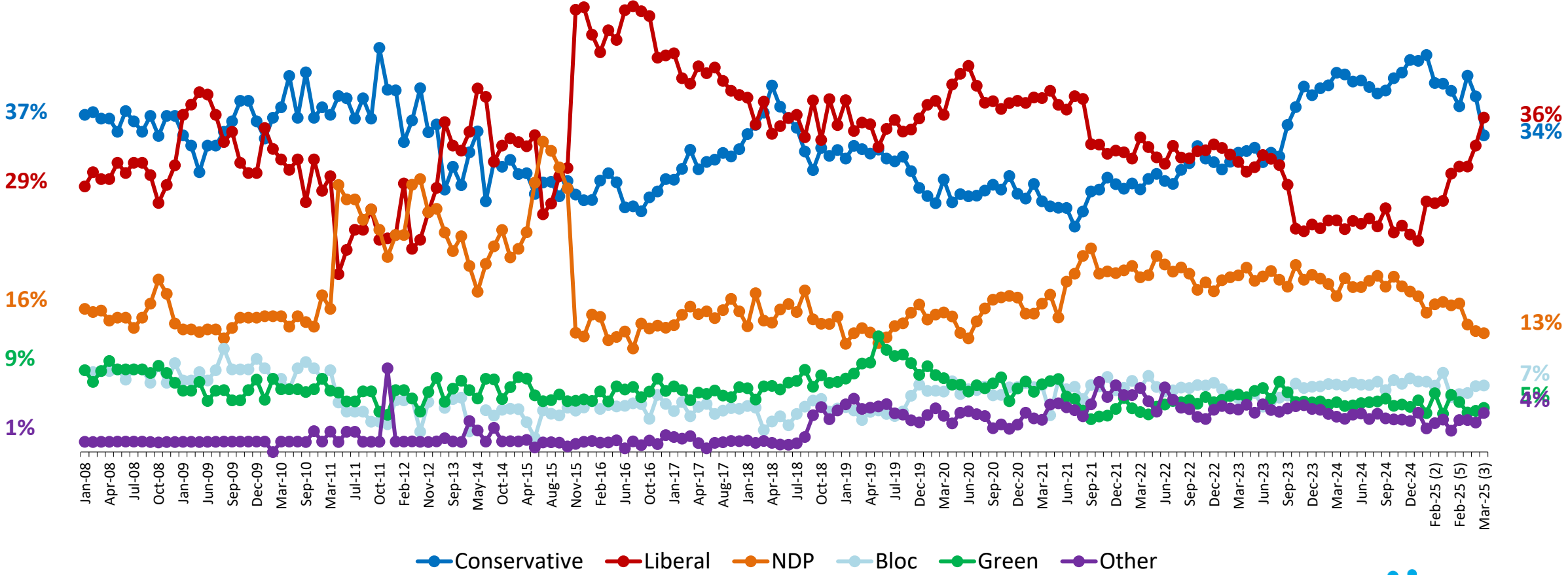
Decided Vote BY Region:
Ontario, Quebec and Atlantic regions show highest Liberal support; BC, Alberta, and Prairies show highest support for Conservatives

Decided vote by REGION

REGION

		BC	AB	Prairies	ON	QC	Atlantic
		(N=125)	(N=100)	(N=54)	(N=346)	(N=204)	(N=61)
Decided Vote	Conservative	35%	48%	45%	37%	20%	34%
	Liberal	31%	31%	30%	41%	33%	46%
	NDP	18%	13%	16%	15%	6%	10%
	Bloc	0%	0%	0%	0%	32%	0%
	Green	13%	2%	3%	3%	4%	5%
	Other	3%	7%	5%	3%	5%	5%

Current data: March 2025

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Combined Vote by Value Cluster: Populist Conservatives and Pay-as-you-go Moderates show highest support for Conservatives; all other value clusters show support for Liberal

Value Clusters

Federal Combined Vote	Populist Conservatives (N=116)	Deferential Conservatives (N=108)	Business Liberals (N=238)	Left Liberals (N=166)	Core Left (N=183)	Pay-as-you-go Moderates (N=190)
Conservative	66%	31%	33%	22%	14%	28%
Liberal	16%	38%	39%	32%	39%	24%
NDP	3%	11%	6%	15%	19%	14%
Bloc	1%	10%	6%	5%	8%	8%
Green	3%	4%	3%	6%	5%	3%
Other	6%	2%	2%	5%	3%	6%
Undecided DK	5%	3%	10%	10%	7%	8%
Would not vote/None	0%	1%	0%	5%	5%	9%

Note: Current data: March 2025

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Combined Vote by Time for Change:

Time for Change

Federal Combined Vote	Core LPC (N=137)	Soft LPC (N=99)	Time for change (N=192)	Uncertain (N=85)	Soft anti-LPC (N=265)	Hostile (N=222)
Conservative	2%	5%	19%	11%	34%	72%
Liberal	86%	65%	49%	23%	10%	0%
NDP	5%	11%	15%	6%	19%	6%
Bloc	2%	8%	7%	7%	10%	4%
Green	1%	5%	3%	5%	6%	5%
Other	1%	0%	1%	4%	5%	9%
Undecided DK	3%	6%	5%	28%	10%	3%
Would not vote/None	1%	1%	1%	17%	5%	2%

Note: Current data: March 2025

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Federal Vote Tracking:

Liberals continue upward trend

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]

Current data: March 2025
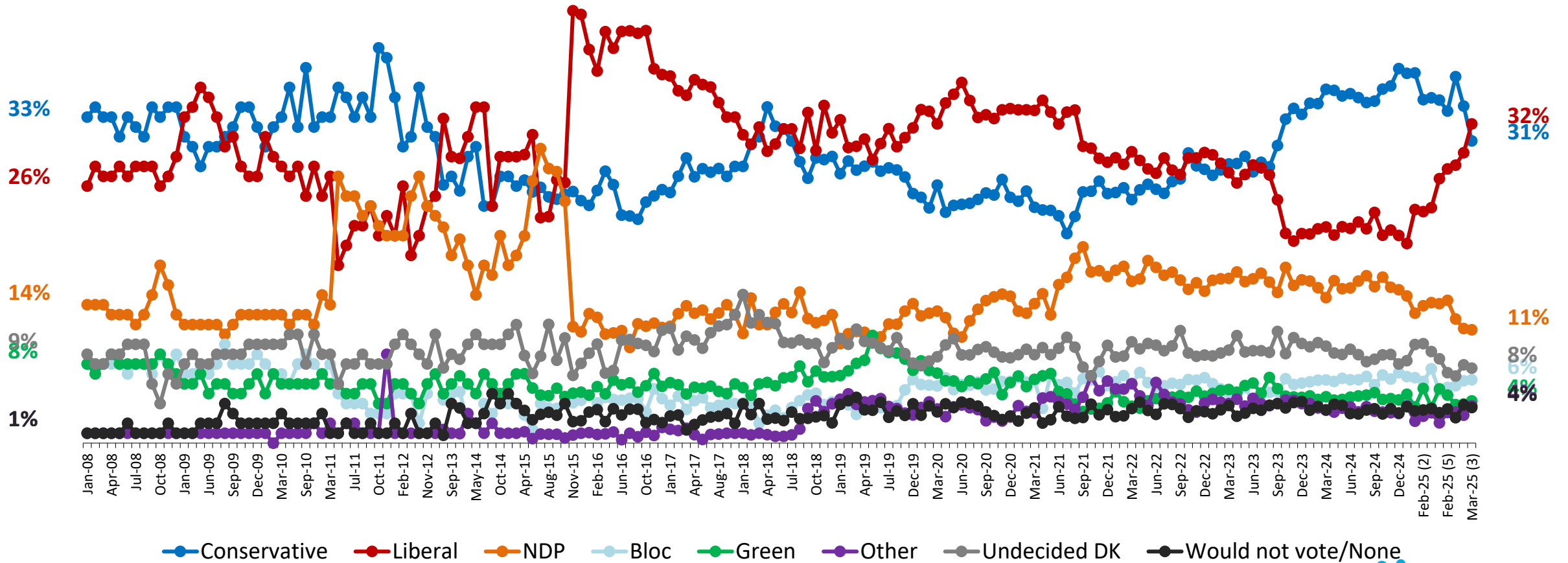
Federal 2nd Choice: NDP takes the lead as the second vote choice at 22%

Q And which party would be your second choice?
[only decided voters; n=888]

Conservative 2nd Choice	Liberal 2nd Choice	NDP 2nd Choice	Bloc 2nd Choice	Green 2nd Choice	Other 2nd Choice	Undecided	WNV/None
12%	14%	22%	3%	11%	8%	16%	15%

Current data: March 2025

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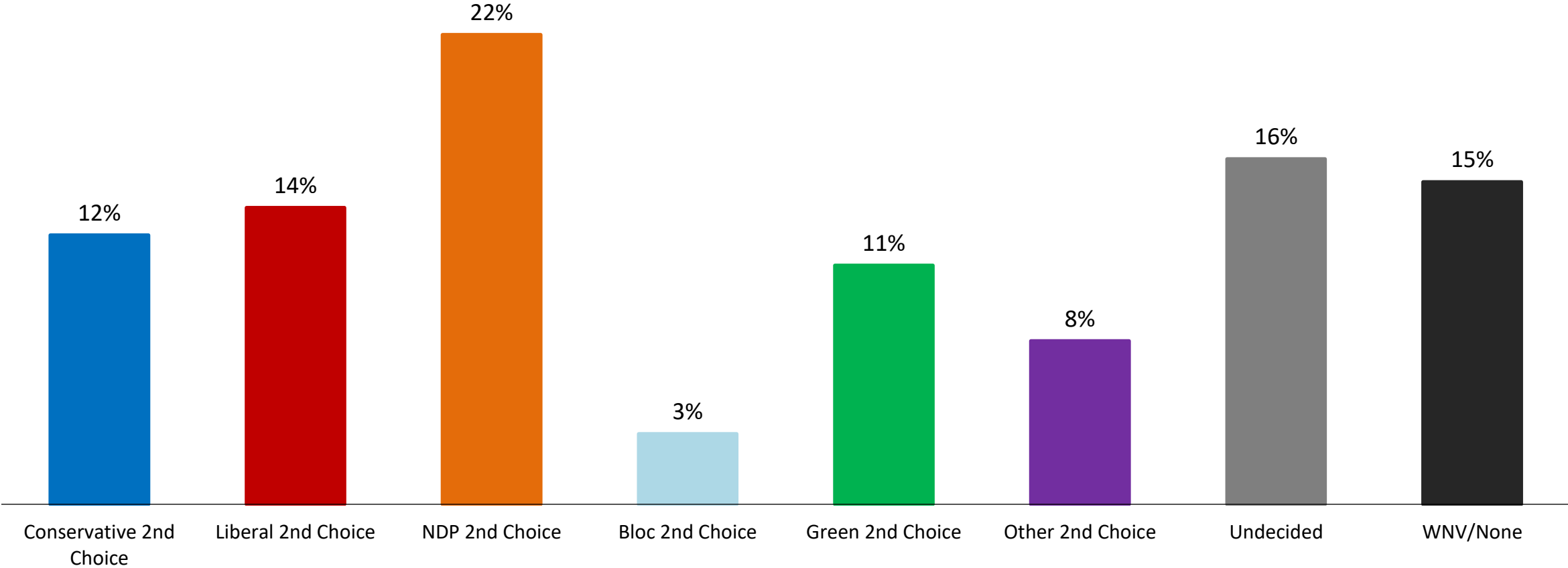
Federal 2nd Choice: 42% of those who prefer the Liberals as their first choice would rank the NDP as their second choice; 39% of those favoring the NDP first would choose the Liberals as their second

And which party would be your second choice? BY [Vote+Lean]

First Choice

Second Choice	Conservative 1st Choice (N=306)	Liberal 1st Choice (N=323)	NDP 1st Choice (N=115)	Bloc 1st Choice (N=64)	Green 1st Choice (N=43)
Conservative 2nd Choice		19%	19%	13%	11%
Liberal 2nd Choice	18%		39%	21%	17%
NDP 2nd Choice	12%	42%		11%	24%
Bloc 2nd Choice	2%	5%	0%		9%
Green 2nd Choice	9%	11%	19%	9%	0%
Other 2nd Choice	14%	2%	5%	8%	18%
Undecided	18%	13%	11%	27%	22%
WNV/None	27%	8%	7%	11%	0%

Note: 'Other' in Combined Vote not shown due to insufficient sample size.
Current data: March 2025

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Leadership

Leader Favourables: Carney surpasses Poilievre by 5 points in favourability; Poilievre has the highest unfavourable ratings at 44%

Q 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=1000]

	Very favourable	Somewhat favourable	Neutral/Neither favourable nor unfavourable	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't know
Mark Carney	18%	23%	24%	11%	17%	4%	4%
Pierre Poilievre	14%	21%	16%	13%	32%	2%	3%
Jagmeet Singh	7%	23%	25%	13%	24%	3%	3%
Yves-Francois Blanchet	11%	21%	31%	8%	15%	9%	6%

Current data: March 2025

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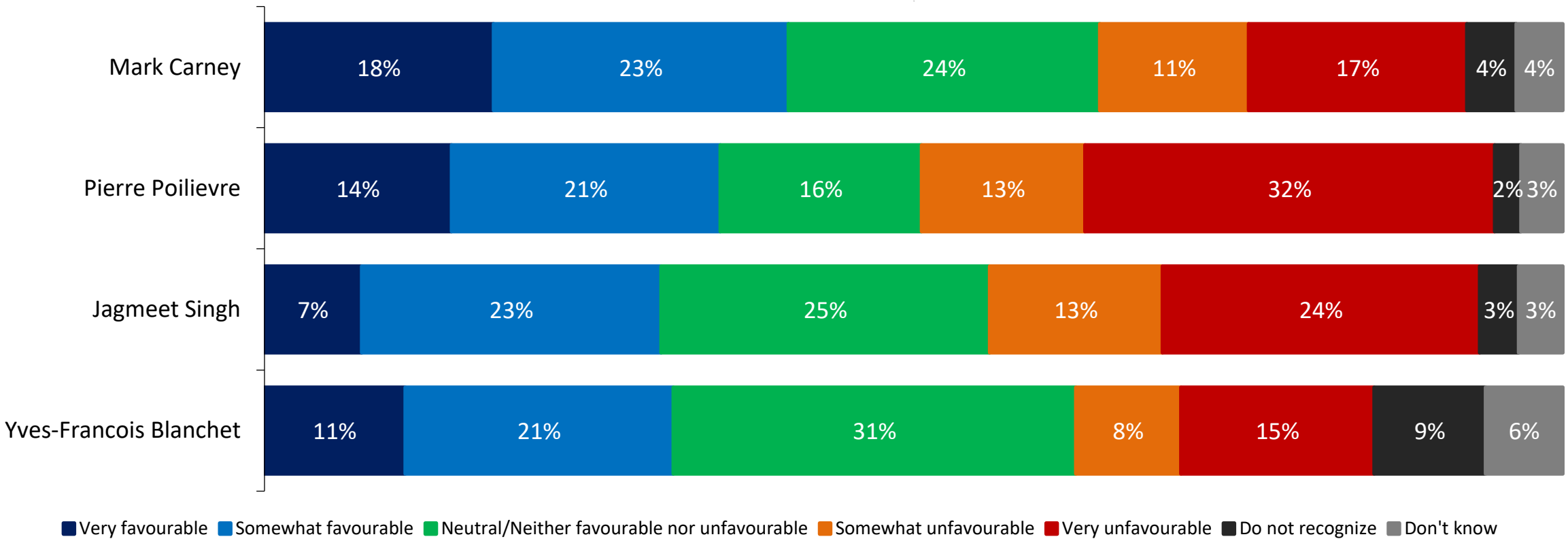
Party Leader NET Favourables Tracking: Poilievre drops to -9 in net favourability; Carney reaches 12%, highest since tracking began

Q 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.
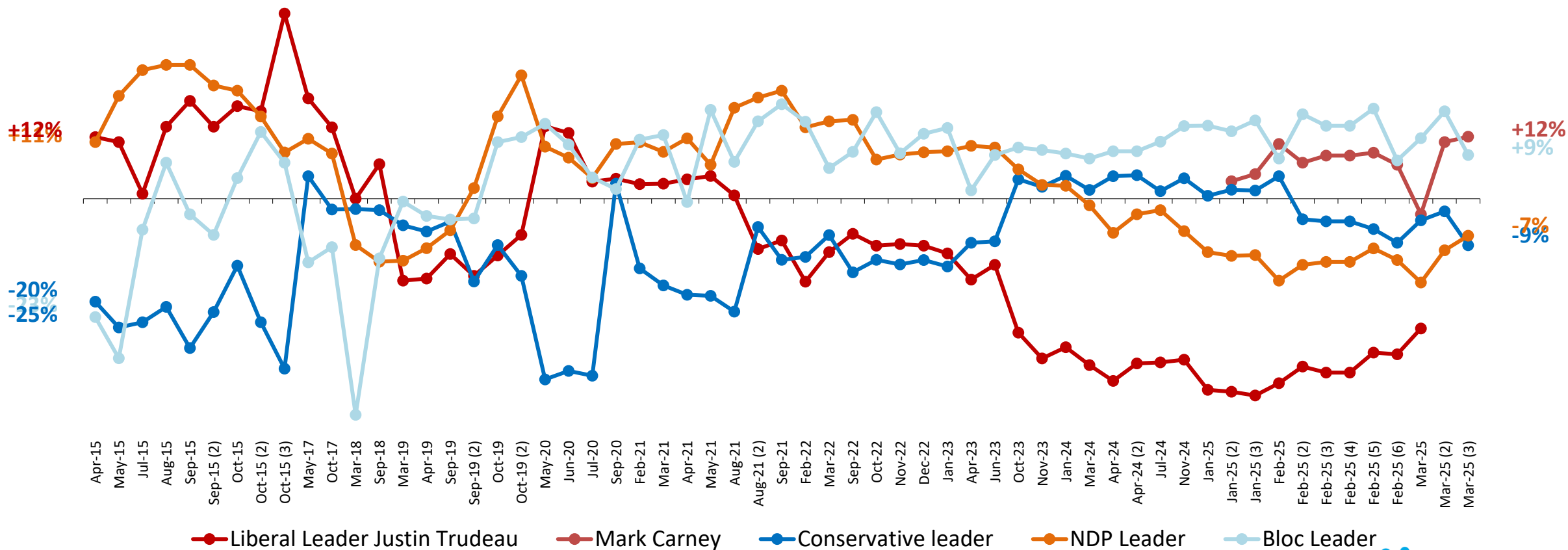
[asked of all respondents; n=0]

+12% +11%

+12%
+9%

-7%
-9%

-20%
-23%
-25%

Legend: ● Liberal Leader Justin Trudeau   ● Mark Carney   ● Conservative leader   ● NDP Leader   ● Bloc Leader

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Best Prime Minister: Carney leads as best Prime Minister at 34%, surpassing Poilievre by 7 points

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents; n=1000]

Mark Carney of the Liberals	Pierre Poilievre of the Conservatives	Jagmeet Singh of the NDP	Yves-François Blanchet of the Bloc Quebecois	Elizabeth May of the Green Party	Maxime Bernier of the People's Party	Undecided/Don't know	None
34%	27%	10%	3%	3%	4%	16%	4%

Current data: March 2025

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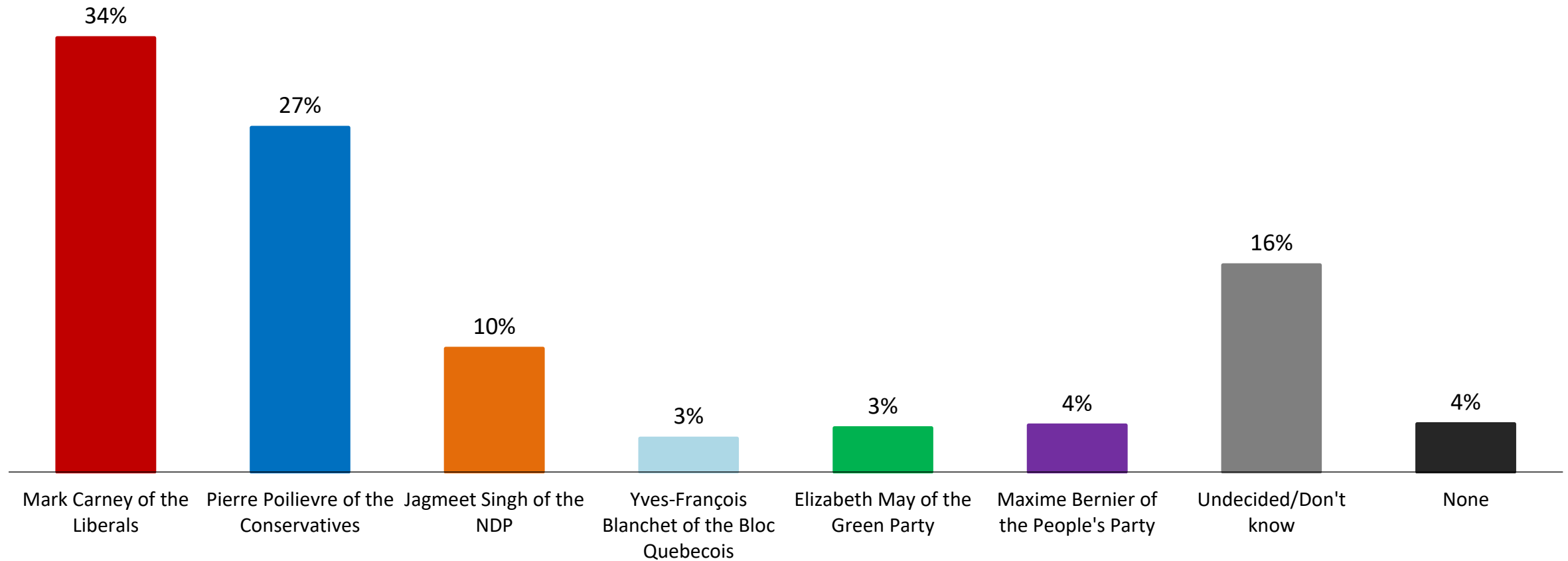
Best Prime Minister Tracking (Decided): Over 2-in-5 of decided voters say a Liberal leader would make the best Prime Minister; 34% say Conservatives
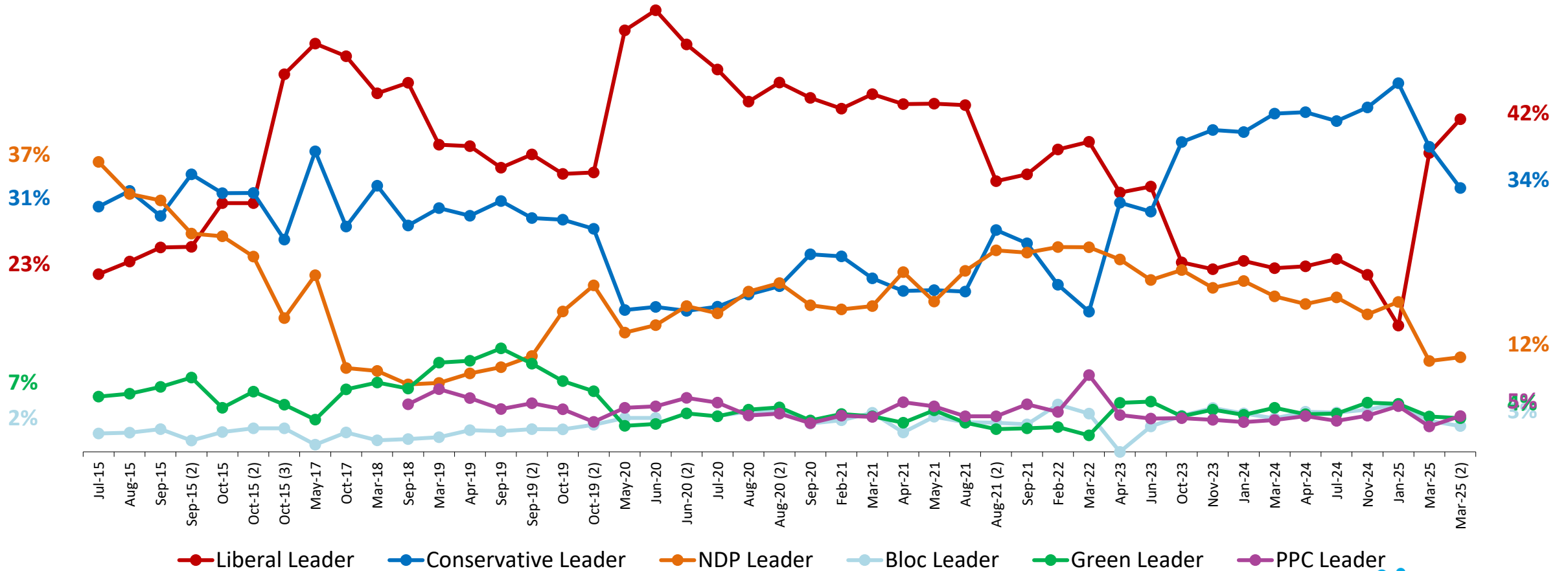
Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents; n=1000]

Legend: Liberal Leader, Conservative Leader, NDP Leader, Bloc Leader, Green Leader, PPC Leader

Current data: March 2025

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Best Prime Minister (Quebec vs. ROC):

Carney's support is at 34% in both Quebec and the rest of Canada

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents; n=1000]

	Quebec	Rest of Canada
	(N=230)	(N=770)
Mark Carney	34%	34%
Pierre Poilievre	18%	30%
Jagmeet Singh	8%	10%
Yves-François Blanchet	11%	0%
Elizabeth May	2%	4%
Maxime Bernier	4%	3%
Undecided/Don't know	18%	16%
None	4%	4%

Current data: March 2025

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Read, Seen, Heard

Campaign Attention:
63% of Canadians have RSH something about Carney, 45% about Poilievre

Q Have you read, seen or heard anything about [LEADER] and the [PARTY] in the last few days?
[asked of all respondents; n=1000]

	Yes	No
Mark Carney and the Liberals	63%	37%
Pierre Poilievre and the Conservative Party	45%	55%
Jagmeet Singh and the NDP	17%	83%
Yves-François Blanchet and the Bloc	15%	85%

■ Yes   ■ No

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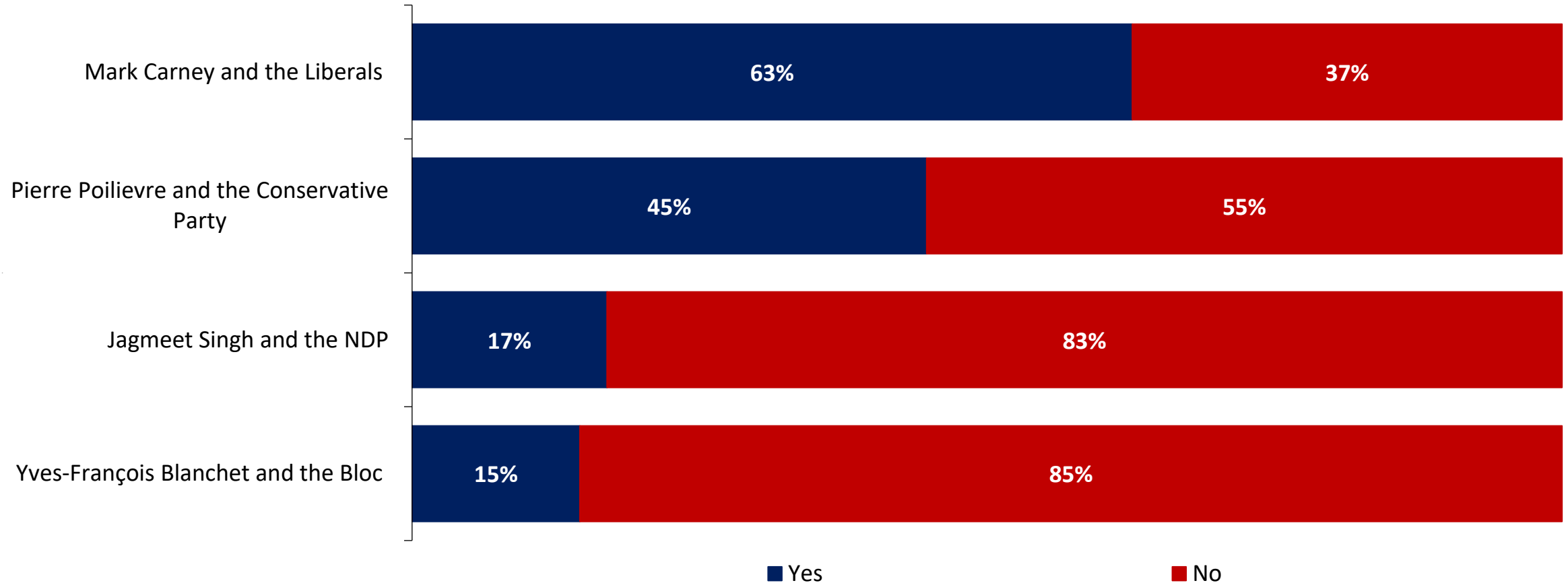
RSH Impact:
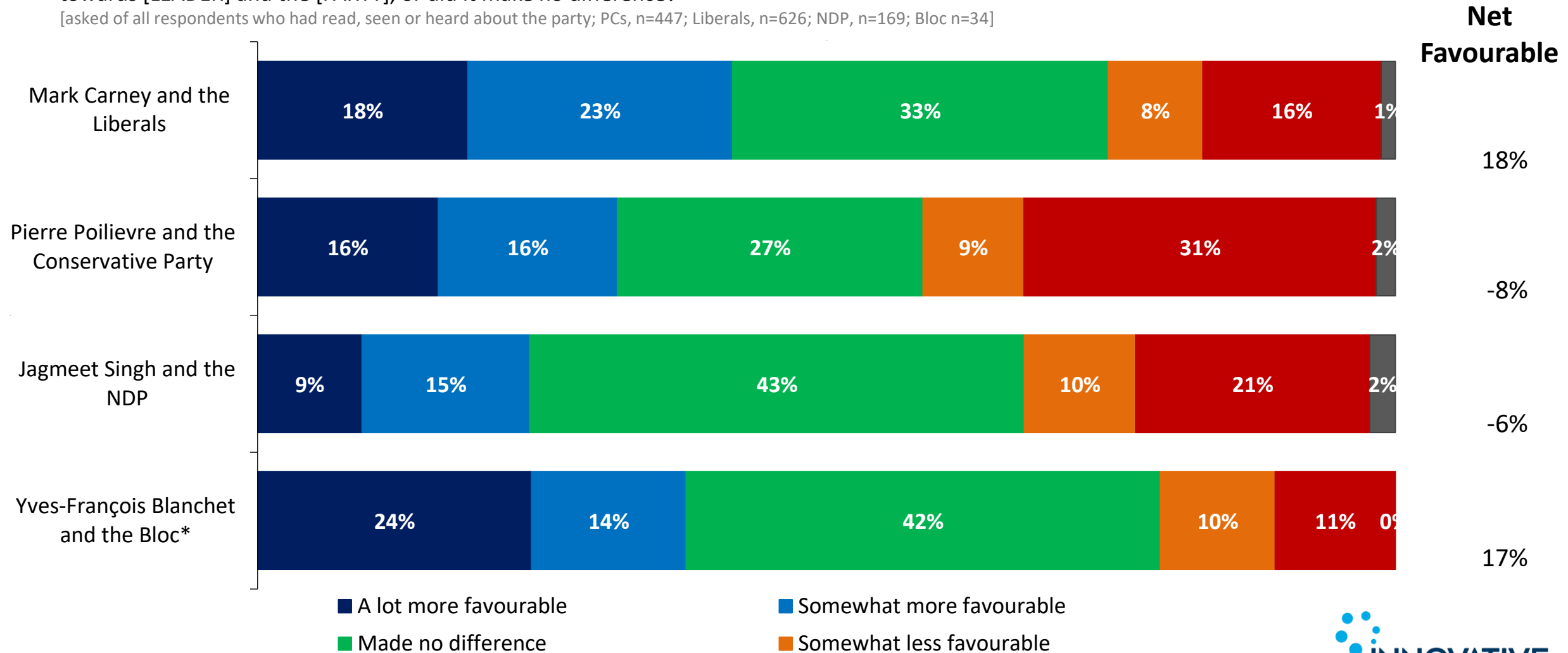## Of those who have RHS of Carney had a net favourable impression of 18%, 26 points higher than Poilievre's

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 [LEADER] and the [PARTY], or did it make no difference?
[asked of all respondents who had read, seen or heard about the party; PCs, n=447; Liberals, n=626; NDP, n=169; Bloc n=34]

Net Favourable

Leader	A lot more favourable	Somewhat more favourable	Made no difference	Somewhat less favourable	A lot less favourable	(grey)	Net Favourable
Mark Carney and the Liberals	18%	23%	33%	8%	16%	1%	18%
Pierre Poilievre and the Conservative Party	16%	16%	27%	9%	31%	2%	-8%
Jagmeet Singh and the NDP	9%	15%	43%	10%	21%	2%	-6%
Yves-François Blanchet and the Bloc*	24%	14%	42%	10%	11%	0%	17%

Legend:
- A lot more favourable
- Somewhat more favourable
- Made no difference
- Somewhat less favourable

[*sample size of Bloc n=34]

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Building Understanding.

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