INNOVATIVE RESEARCH GROUP

Canada This Month

Canadians and Trump

Public Opinion Research
Release Date: March 14th, 2025
Field Dates: Mar 11th, 2025 to Mar 13th, 2025

Table of Contents

Learning Targets

Building from findings off previous waves, this report tracks key voter segments, federal vote intentions, and federal leadership. It also further expands on:

- **Party leaders who would make the best Prime Minister of Canada**

- **Canada-U.S. relations**

- **Reactions to Trump**

- **Responding to tariffs**

INNOVATIVE
RESEARCH GROUP

Summary

1   **Mark Carney had a good week between winning the leadership and being sworn in as Prime Minister.** Canadians tuned in to politics in unusually high numbers, they liked what they heard about the federal government, and Carney's image bounced back to a net positive score of +11.

2   **The leadership contest has fundamentally changed.** In January Poilievre had a 30 point lead over Trudeau as best to be PM. Today Poilievre and Carney are in a virtual tie. Carney equals Poilievre in rallying his own partisans and beats Poilievre among other partisan segments. Carney has a 20-point lead among Time for A Change Liberals, a critical group of swing voters. The two leaders are tied in Ontario and BC, key regional battlegrounds.

3   **The CPC lead over the Liberals has narrowed again.** The Conservatives continue to maintain a lead (now at 39% CPC, Liberals 33%), but the lead has closed by 4-points compared to last week. Conservatives maintain a small 3-point lead in Ontario but a larger 13-point lead in BC. The Liberals and Bloc are neck-and-neck in Quebec.

4   **Federal approval continues to follow the pattern of surging at crisis points and then ebbing.** Even so, federal approval remains high at 31% while Poilievre and CPC trail at just +6. Carney now enjoys a 5-point lead over Poilievre on best equipped to handle Canada-US relations.

5   **While most other trade attitudes are generally stable, there is a consistent marginal decline in support for more 'aggressive' responses the US.** We will check next week to see if this may be a result of reaction to the electricity surcharge experience.

Key Voter Segments

Federal Party ID (Quebec vs. ROC)

The Liberals and Bloc are almost tied in Quebec; Conservatives hold a 11-point lead over Liberals elsewhere

Party ID: Quebec

[Respondents in Quebec; n=230]

Conservative	Liberal	NDP	Bloc	Other	Unaligned
13%	23%	6%	26%	7%	24%
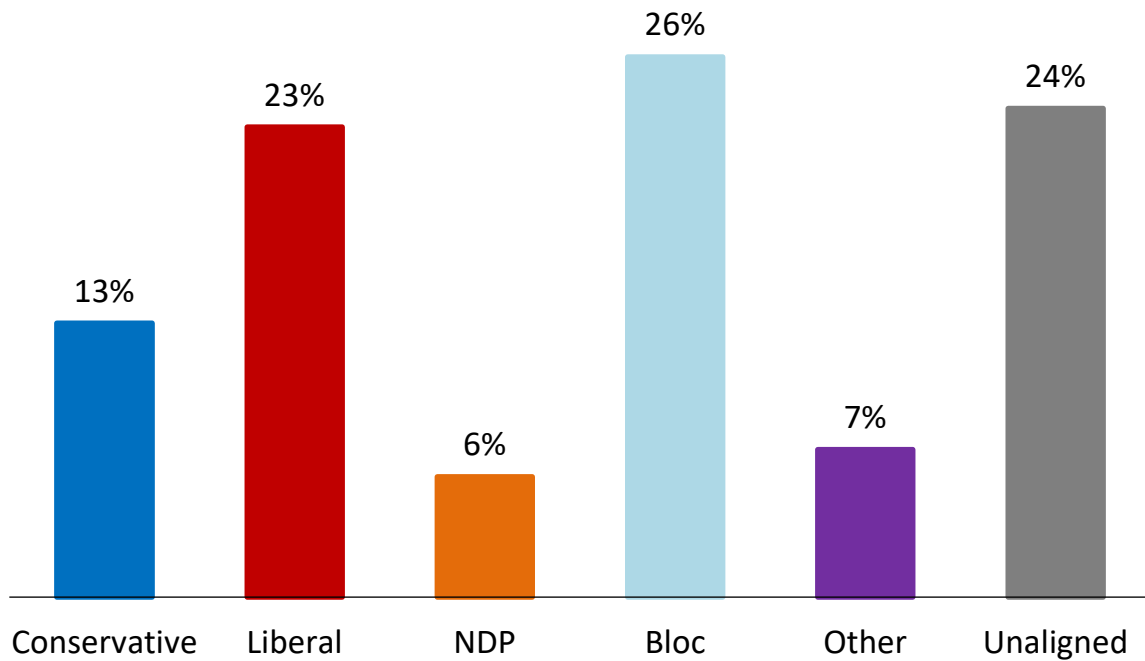
Party ID: Rest of Canada

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

Conservative	Liberal	NDP	Other	Unaligned
36%	24%	14%	8%	18%

Current data: March 2025

INNOVATIVE
RESEARCH GROUP
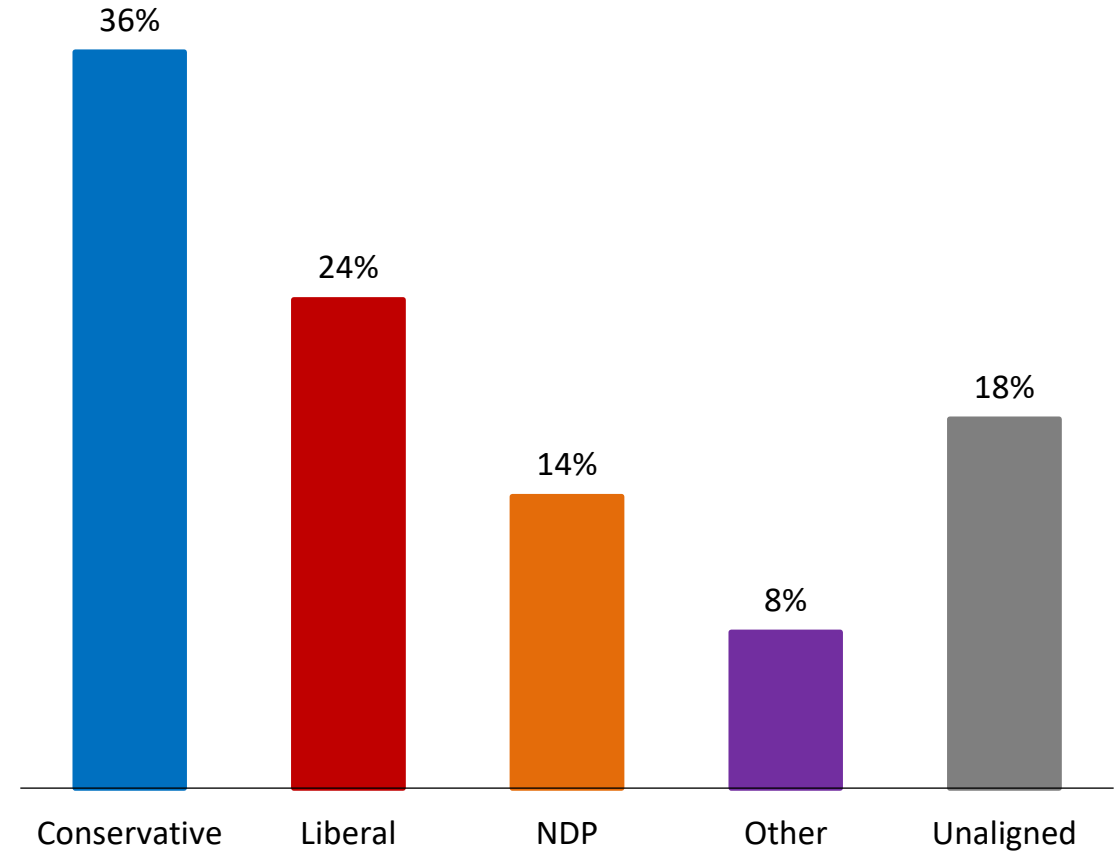
Value Clusters:

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]

Populist Conservatives
13%

Deferential Conservatives
11%

Business Liberals
24%

Left Liberals
16%

Core Left
16%

Pay-as-you-go Moderates
20%

INNOVATIVE RESEARCH GROUP

Current data: February 2025
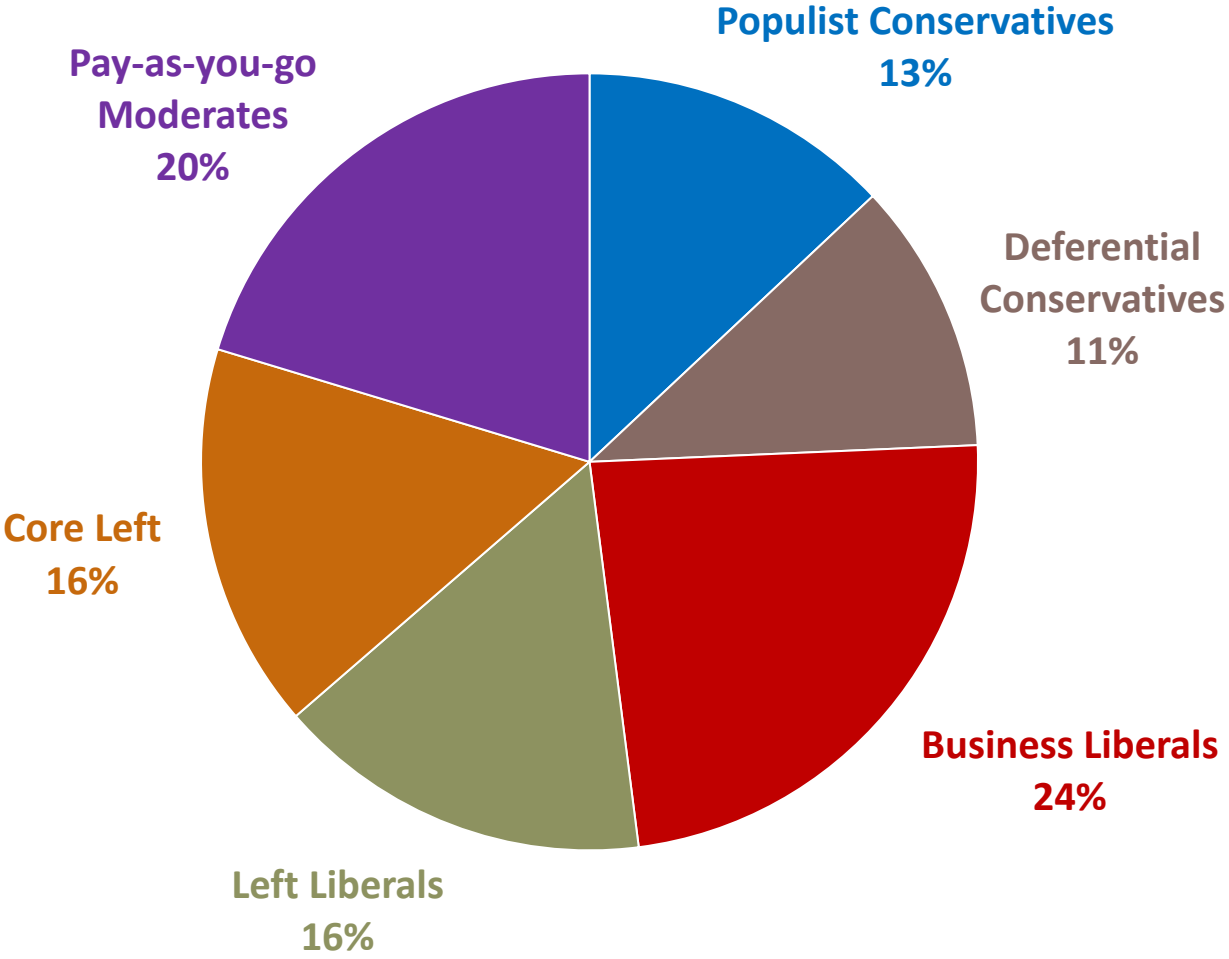
Time for Change

Time for Change Tracking:

'Time for a change' sentiment remains unchanged, with 66% of Canadians 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

Left axis values: 6%, 15%, 6%, 12%, 15%, 47%

Right axis values: 4%, 6%, 8%, 17%, 20%, 46%

Current data: March 2025

INNOVATIVE RESEARCH GROUP
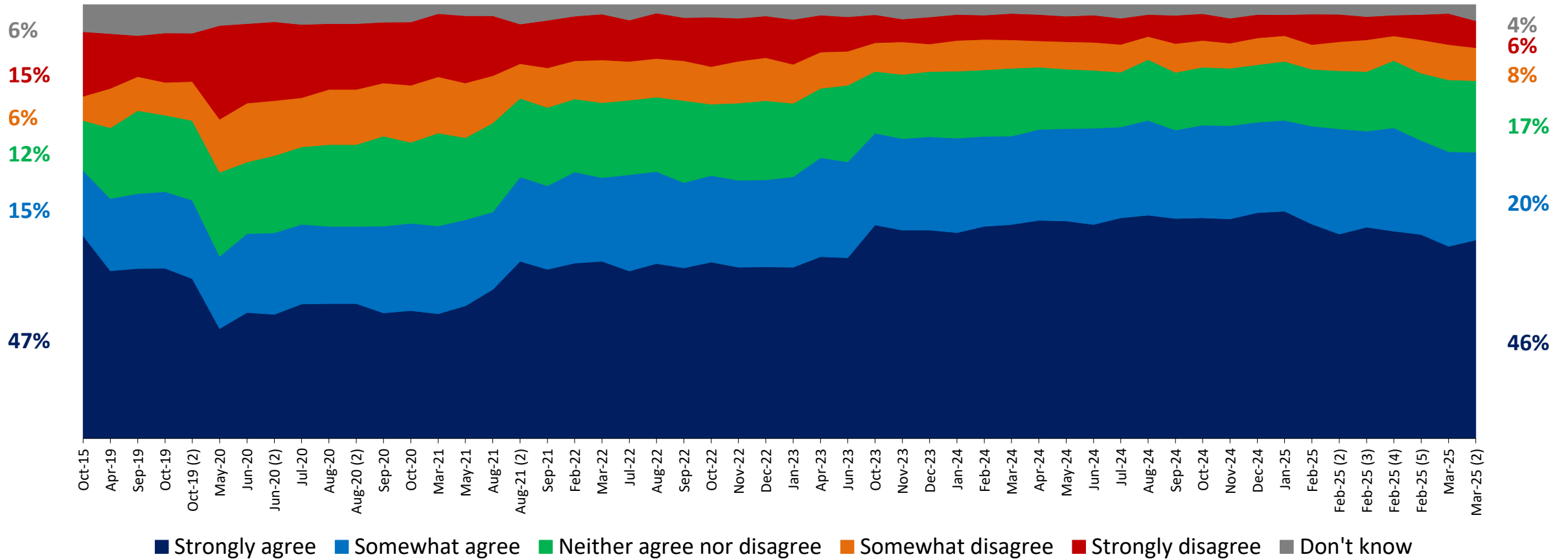
Liberals Best Party Tracking:

Increasing numbers of Canadians agree that, despite their problems, the Liberals are the best party to govern

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]

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

Current data: March 2025
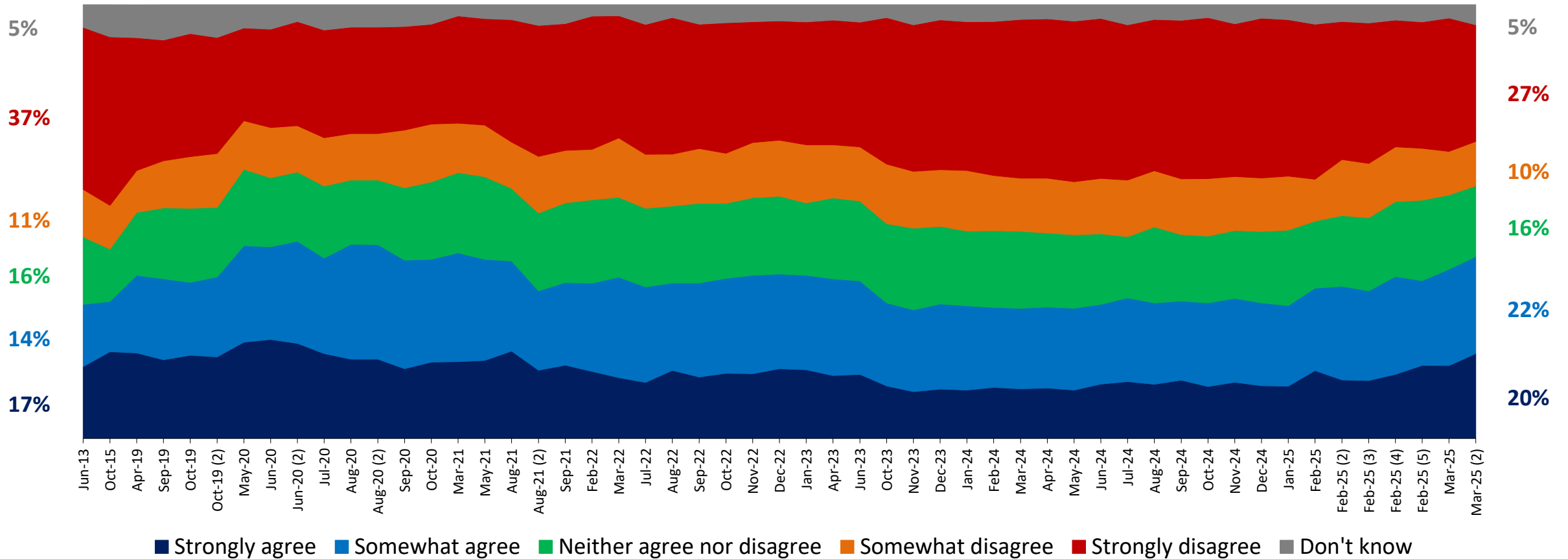
Time for Change Segmentation:
At 22%, soft anti-LPC Liberals are the key voter segment

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
12%	10%	21%	11%	22%	25%

Current data: March 2025

INNOVATIVE
RESEARCH GROUP
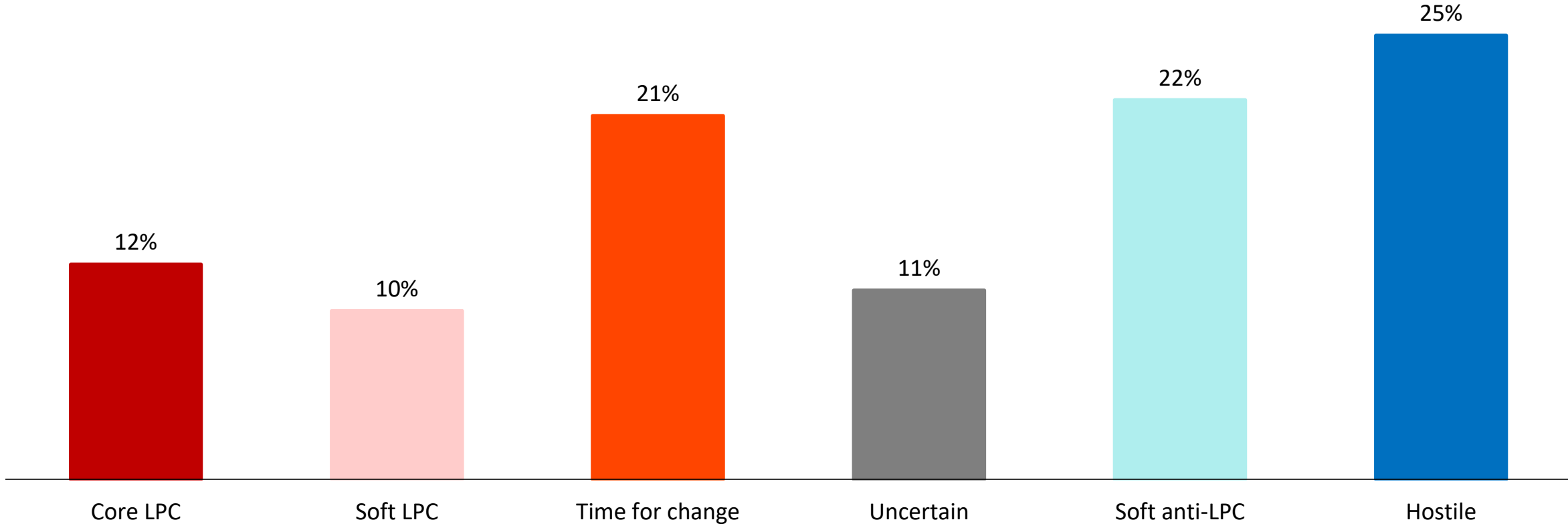
Federal Vote

Federal Decided Vote Tracking:

Liberals continue an upward trend, Conservatives hold steady and retain a 6-point lead

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=882]

Current data: March 2025

INNOVATIVE RESEARCH GROUP
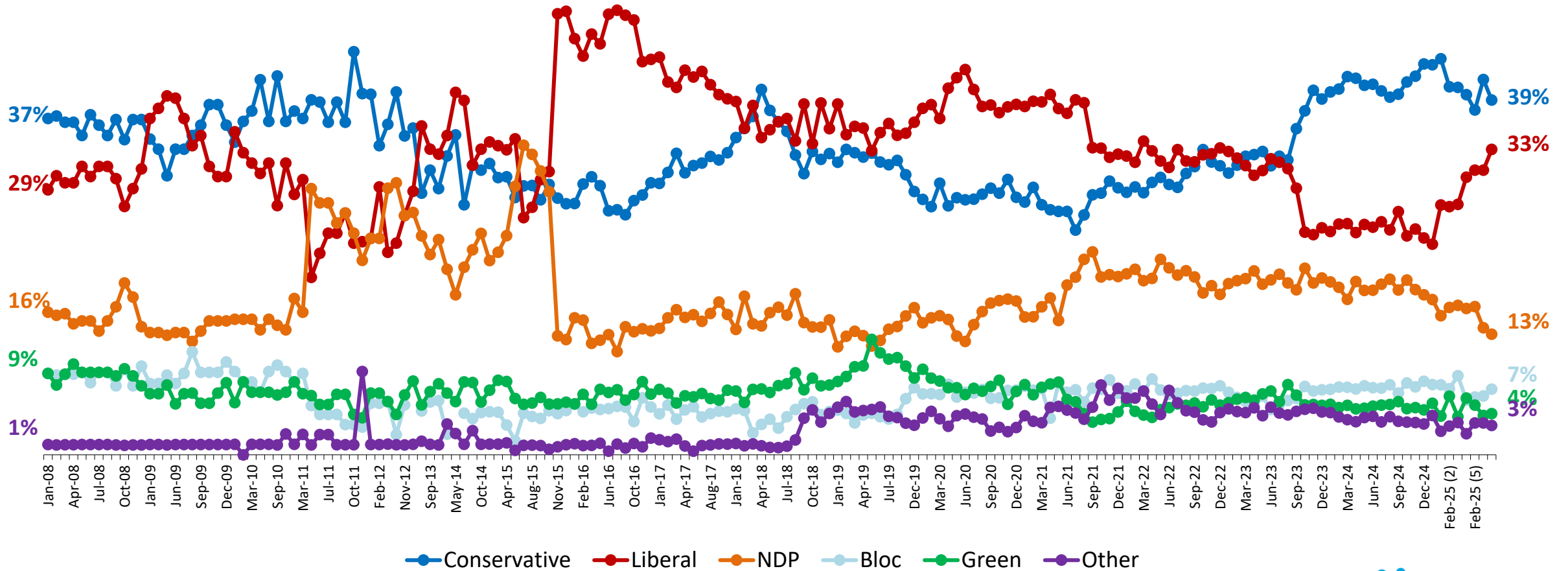
Decided Vote BY Region:

Conservative strongholds remain in AB, while Atlantic show the highest Liberal support

Decided vote by REGION

	REGION					
	BC	**AB**	**Prairies**	**ON**	**QC**	**Atlantic**
	(N=126)	(N=105)	(N=56)	(N=345)	(N=195)	(N=56)
Conservative	45%	50%	43%	40%	23%	45%
Liberal	32%	29%	27%	37%	30%	40%
NDP	18%	15%	23%	15%	5%	6%
Bloc	0%	0%	0%	0%	32%	0%
Green	4%	3%	3%	4%	6%	6%
Other	2%	4%	4%	3%	3%	3%

Decided Vote

Current data: March 2025

INNOVATIVE
RESEARCH GROUP

Federal Combined Vote:

The Conservatives hold a 5-point lead with first choice+lean. Only 8% say undecided.

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]

Conservative	Liberal	NDP	Bloc	Green	Peoples Party	Maverick Party	Other	Undecided/DK	Would not vote/None
34%	29%	12%	6%	4%	3%	0%	0%	8%	4%

Current data: March 2025
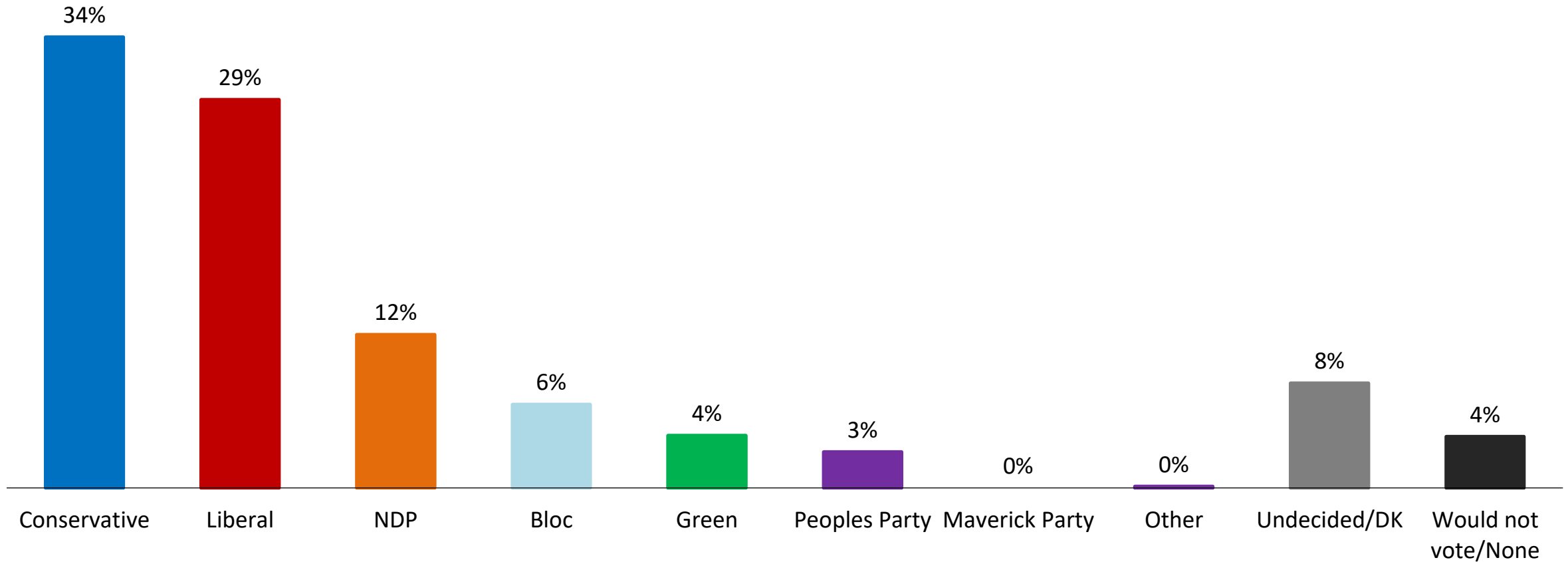
Federal Vote Tracking:

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]

Legend: Conservative, Liberal, NDP, Bloc, Green, Other, Undecided/DK, Would not vote/None

Left axis labels: 33%, 26%, 14%, 9%, 8%, 1%
Right axis labels: 34%, 29%, 12%, 8%, 6%, 4%, 3%

Current data: March 2025

INNOVATIVE RESEARCH GROUP
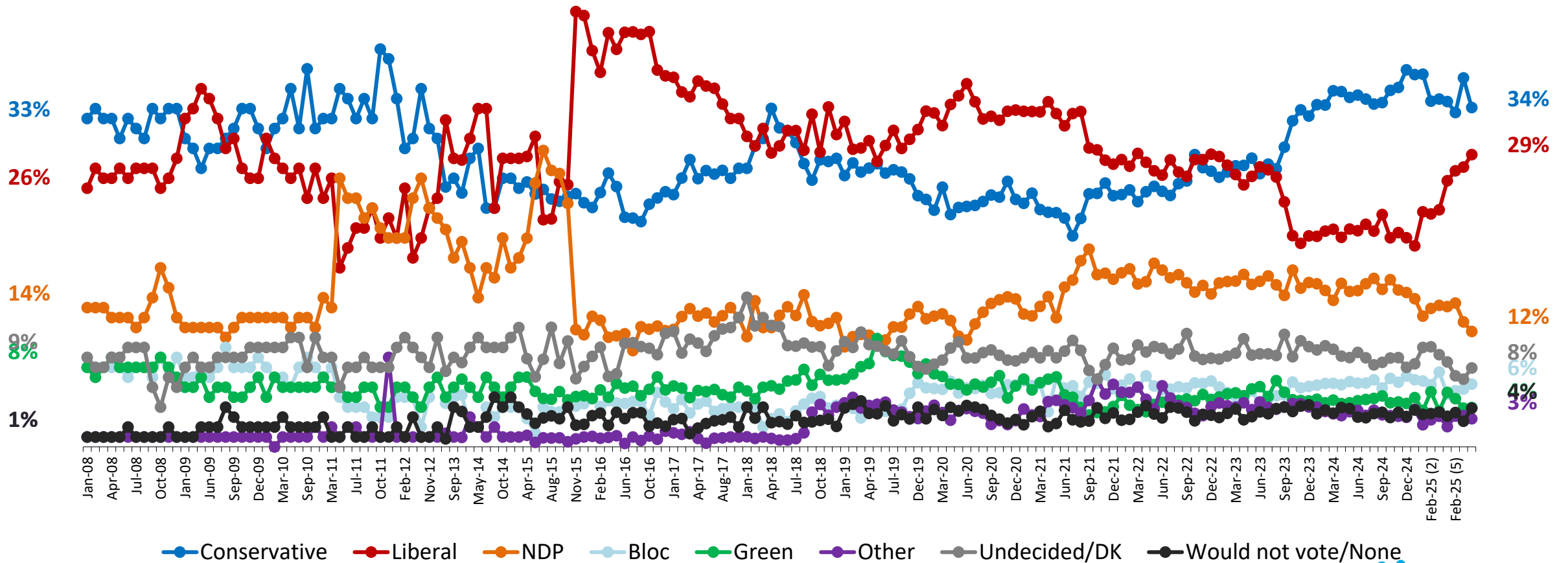
Leadership

Leader Favourables:

Poilievre's strong negatives are at almost 30% in contrast to Carney at 18%

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	17%	24%	18%	11%	18%	6%	6%
Pierre Poilievre	21%	18%	13%	12%	29%	3%	4%
Jagmeet Singh	10%	21%	19%	14%	27%	5%	5%
Yves-Francois Blanchet	16%	20%	25%	10%	9%	12%	8%

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

INNOVATIVE RESEARCH GROUP

Current data: March 2025
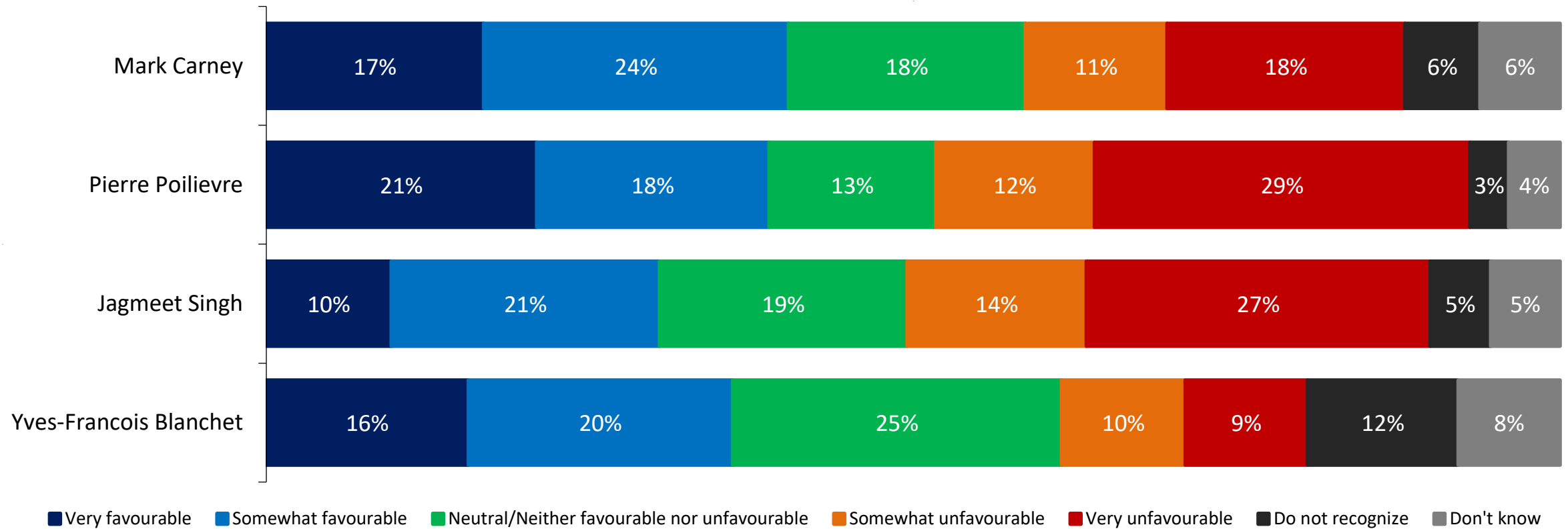
Party Leader NET Favourables Tracking:

Poilievre's net favourability is up 2 points; Carney's lead over Poilievre is 13 points

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=1,000]

Legend: Liberal Leader Justin Trudeau — Mark Carney — Conservative leader — NDP Leader — Bloc Leader
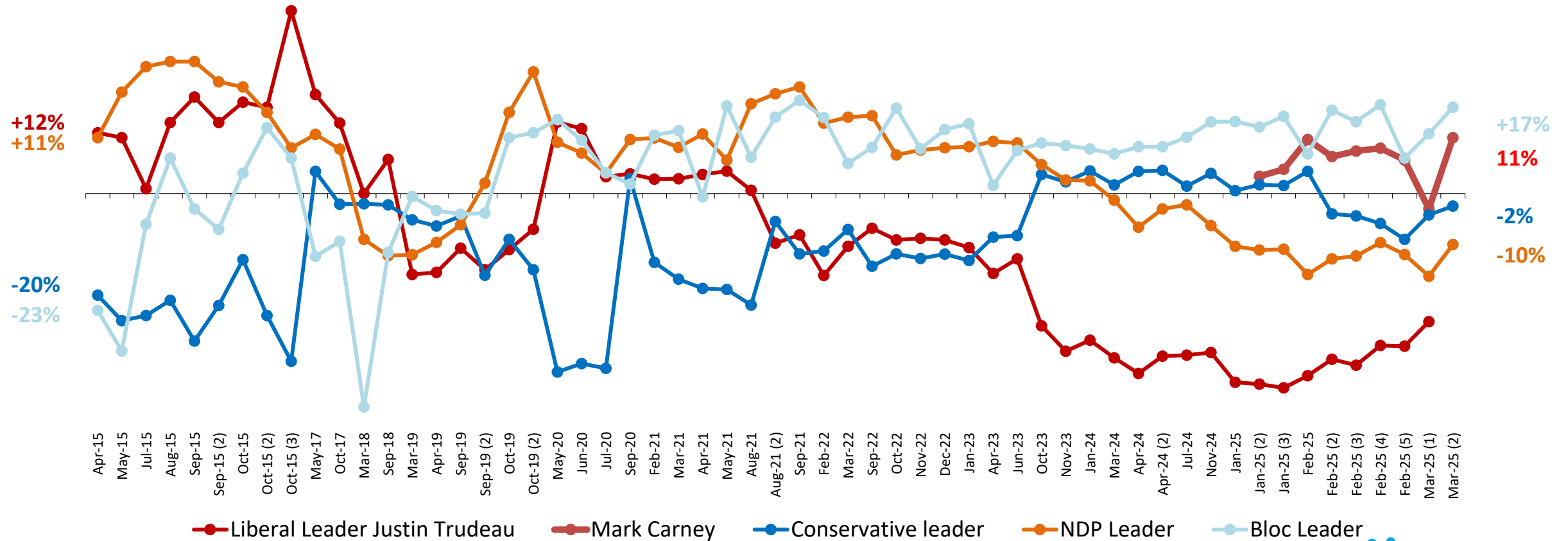
Note: Green Leader, People's Party Leader not shown.
Current data: March 2025
Note: Results for Yves-Francois Blanchet (Bloc Leader) shown of Quebec respondents only; n=230

INNOVATIVE RESEARCH GROUP

Best Prime Minister

Canadians are split between Pierre Poilievre and Mark Carney

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

Pierre Poilievre of the Conservatives	Mark Carney of the Liberals	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
30%	30%	9%	3%	4%	3%	17%	5%

Current data: March 2025

INNOVATIVE RESEARCH GROUP
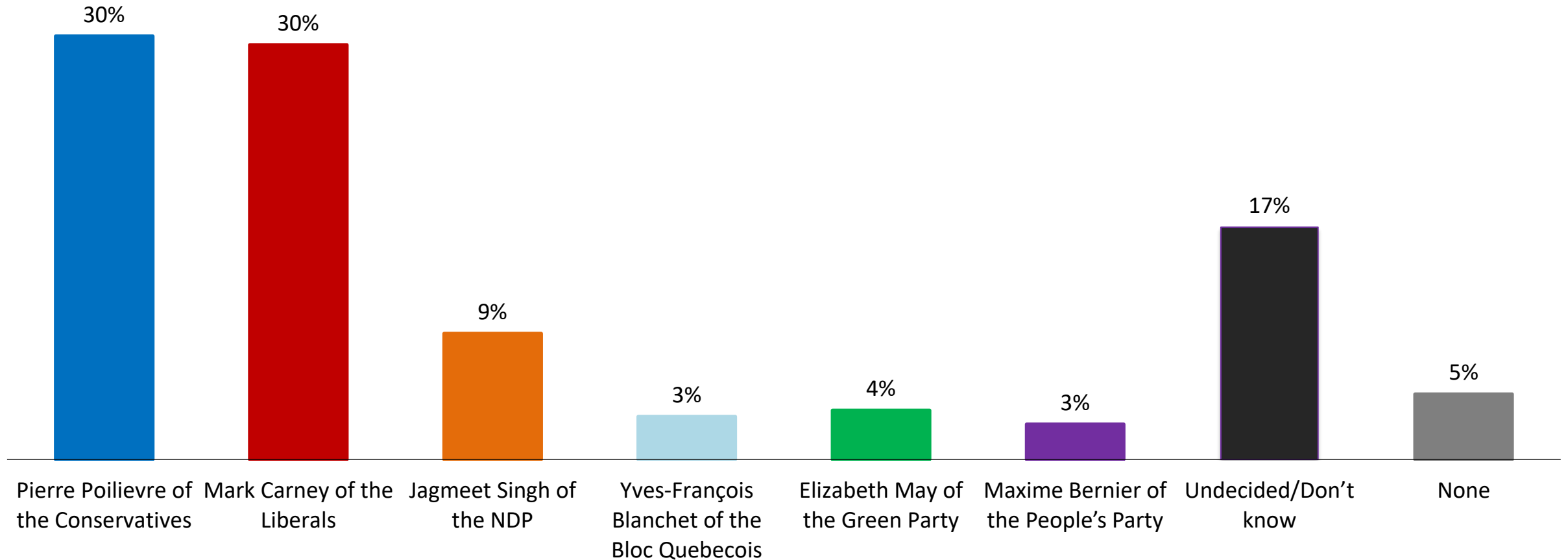
Best Prime Minister Tracking:

Poilievre slips 8-points, Liberals see a 22-point jump from Trudeau to Carney

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
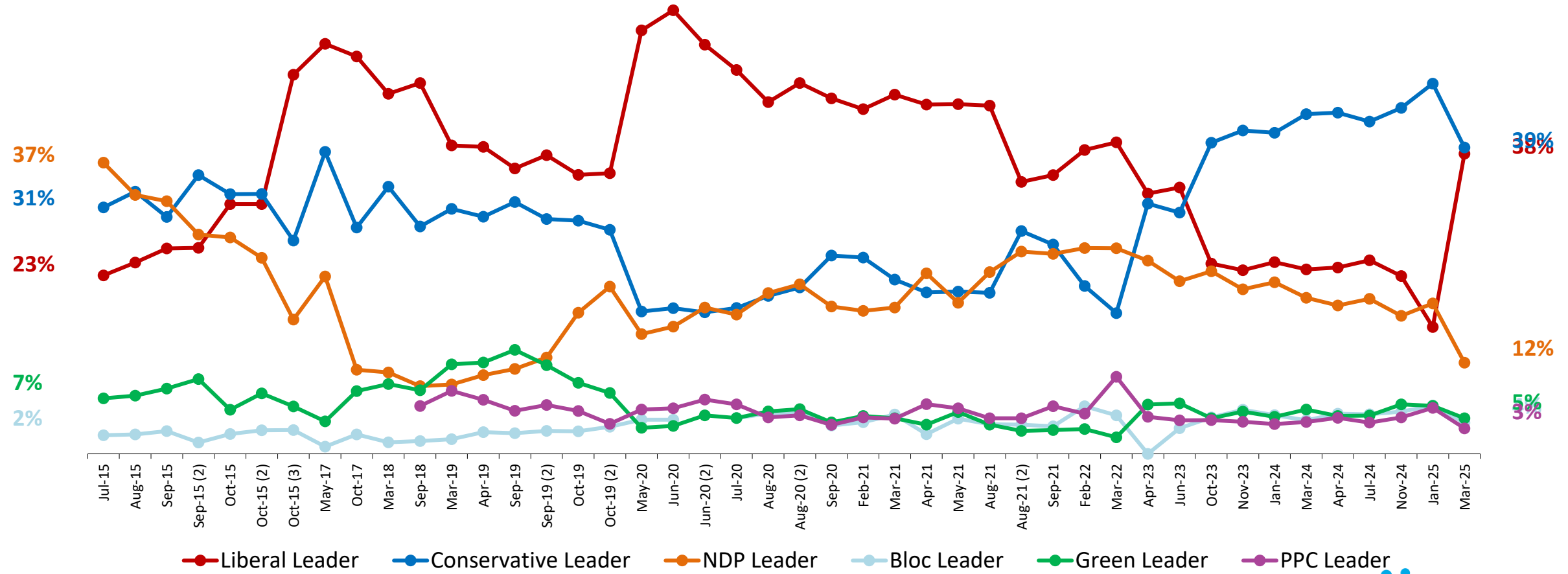
Current data: March 2025
Note: Slide shows the percentage for best PM rebased out of all the parties/leader while excluding those say don't know or none

INNOVATIVE
RESEARCH GROUP

Best Prime Minister (by PARTY ID):

Carney matches Poilievre in their bases, Carney leads with other groups

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

	CPC (N=308)	Liberal (N=237)	NDP (N=124)	Green/Other (N=136)	Unaligned (N=194)
Pierre Poilievre	80%	7%	7%	8%	11%
Mark Carney	7%	77%	26%	18%	19%
Jagmeet Singh	3%	4%	47%	7%	3%
Yves-François Blanchet	0%	0%	0%	22%	0%
Elizabeth May	1%	3%	1%	14%	2%
Maxime Bernier	1%	0%	3%	12%	1%
Undecided/DK/ None	7%	9%	16%	19%	64%

Current data: March 2025

Best Prime Minister (by TIME FOR CHANGE SEGMENTS):

Carney has 20-point lead among the critical and conflcted Time-for-A-Change Liberals

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

	Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
	(N=122)	(N=96)	(N=207)	(N=107)	(N=216)	(N=252)
Pierre Poilievre	4%	8%	23%	9%	28%	69%
Mark Carney	90%	59%	43%	13%	12%	1%
Jagmeet Singh	3%	11%	11%	9%	13%	7%
Yves-François Blanchet	0%	0%	3%	5%	5%	3%
Elizabeth May	1%	4%	6%	1%	5%	2%
Maxime Bernier	0%	1%	1%	0%	3%	6%
Undecided/DK/None	2%	17%	13%	63%	33%	11%

Current data: March 2025

Best Prime Minister (Quebec vs. ROC):

In Quebec, Carney's support is at 29%; in the rest of Canada, Poilievre has a 5-point lead over Liberals

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)
Pierre Poilievre	17%	35%
Mark Carney	29%	30%
Jagmeet Singh	8%	9%
Yves-François Blanchet	13%	0%
Elizabeth May	3%	4%
Maxime Bernier	3%	2%
Undecided/DK/None	27%	20%

Current data: March 2025

INNOVATIVE RESEARCH GROUP

Best Prime Minister (REGION):

In Quebec, Carney and Poilievre tied in critical battlegrounds in BC and Ontario

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

	BC	AB	Prairies	ON	QC	Atlantic
	(N=139)	(N=114)	(N=64)	(N=386)	(N=230)	(N=67)
Pierre Poilievre	33%	44%	38%	32%	17%	35%
Mark Carney	34%	23%	24%	32%	29%	33%
Jagmeet Singh	7%	13%	16%	9%	8%	4%
Yves-François Blanchet	0%	0%	0%	0%	13%	0%
Elizabeth May	3%	2%	2%	4%	3%	7%
Maxime Bernier	2%	1%	4%	3%	3%	2%
Undecided/DK/ None	20%	18%	17%	21%	27%	20%

Current data: March 2025

Best Prime Minister (AGE With GENDER):

Support for Carney likely to increase with age, no significant gender difference but women more undecided

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

	18-34	35-54	55+	Man	Woman
	(N=268)	(N=326)	(N=406)	(N=481)	(N=512)
Pierre Poilievre	28%	30%	33%	34%	27%
Mark Carney	25%	29%	34%	32%	28%
Jagmeet Singh	15%	9%	5%	8%	10%
Yves-François Blanchet	2%	2%	5%	3%	3%
Elizabeth May	6%	4%	2%	3%	4%
Maxime Bernier	2%	3%	3%	3%	2%
Undecided/DK/None	22%	24%	19%	17%	26%

Current data: March 2025
Note: 'Prefer to self-describe' not shown.

Best Prime Minister (Value Cluster)

Carney leads with Left Libs and Core Left and has edge with Business Liberals and Deferential Cons.

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

	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
	(N=130)	(N=113)	(N=237)	(N=157)	(N=160)	(N=203)
Pierre Poilievre	58%	29%	31%	22%	21%	27%
Mark Carney	16%	36%	34%	33%	38%	22%
Jagmeet Singh	5%	8%	12%	9%	10%	8%
Yves-François Blanchet	3%	9%	1%	4%	3%	2%
Elizabeth May	1%	1%	3%	4%	6%	5%
Maxime Bernier	6%	2%	2%	2%	4%	0%
Undecided/DK/None	11%	16%	17%	26%	18%	36%

Current data: March 2025

Read, Seen, Heard

Federal Read, Seen, Heard:
Awareness remains high and impact strongly positive

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]

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 all respondents; n=591]

Left chart (vertical bars):
- Yes: 59%
- No: 41%

Right chart (horizontal bars):
- A lot more favourable: 14%
- Somewhat more favourable: 30%
- Made no difference: 33%
- Somewhat less favourable: 9%
- A lot less favourable: 14%

Current data: March 2025
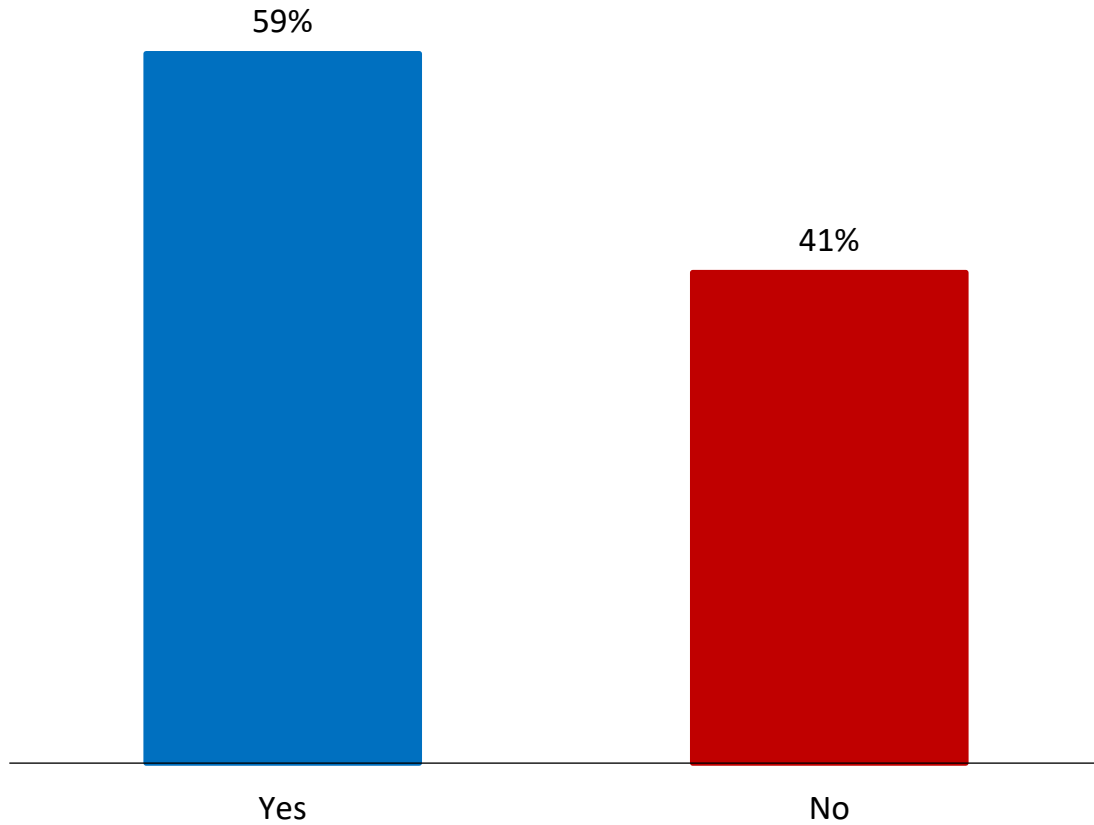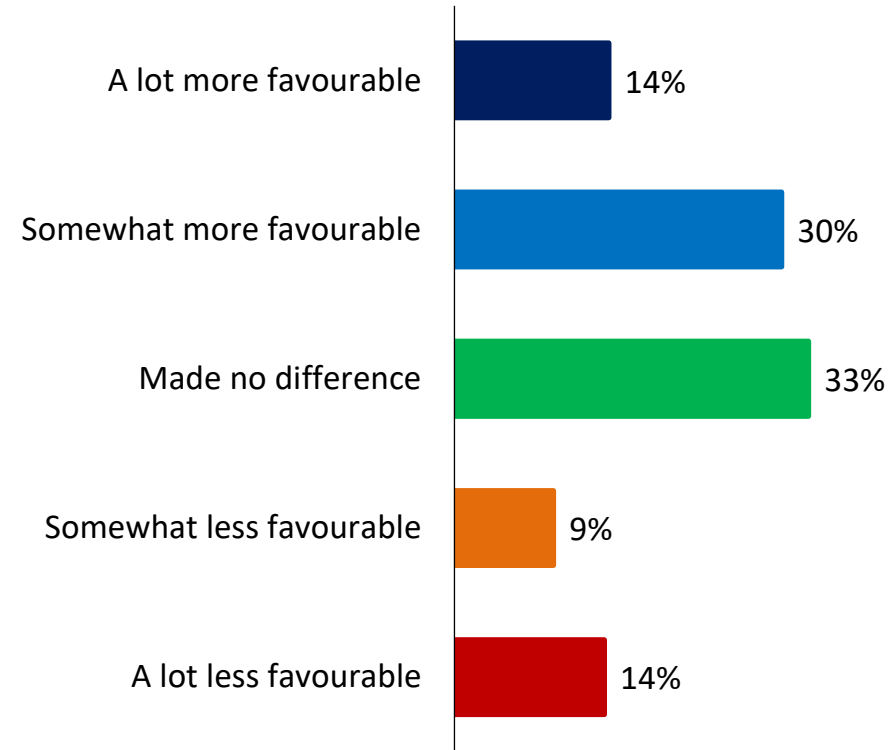
Read, Seen, Heard Tracking:

Attention to recent PM and federal government news remains high at 59% as March begins

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]

55%

45%

59%

41%

No ━●━ Yes ━●━

INNOVATIVE
RESEARCH GROUP
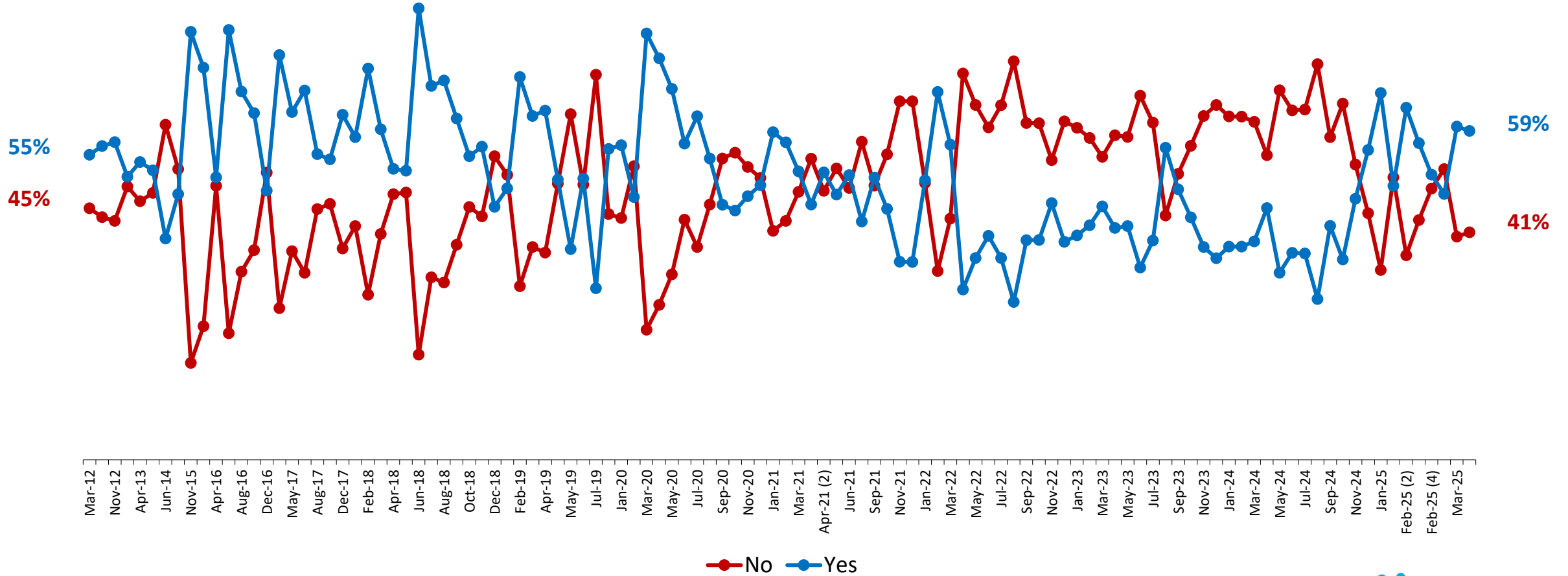
Federal Read, Seen, Heard, Impact Tracking:
While still strongly favourable, RSH impact less favourable than during tariff showdown last week

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=591]

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

INNOVATIVE
RESEARCH GROUP
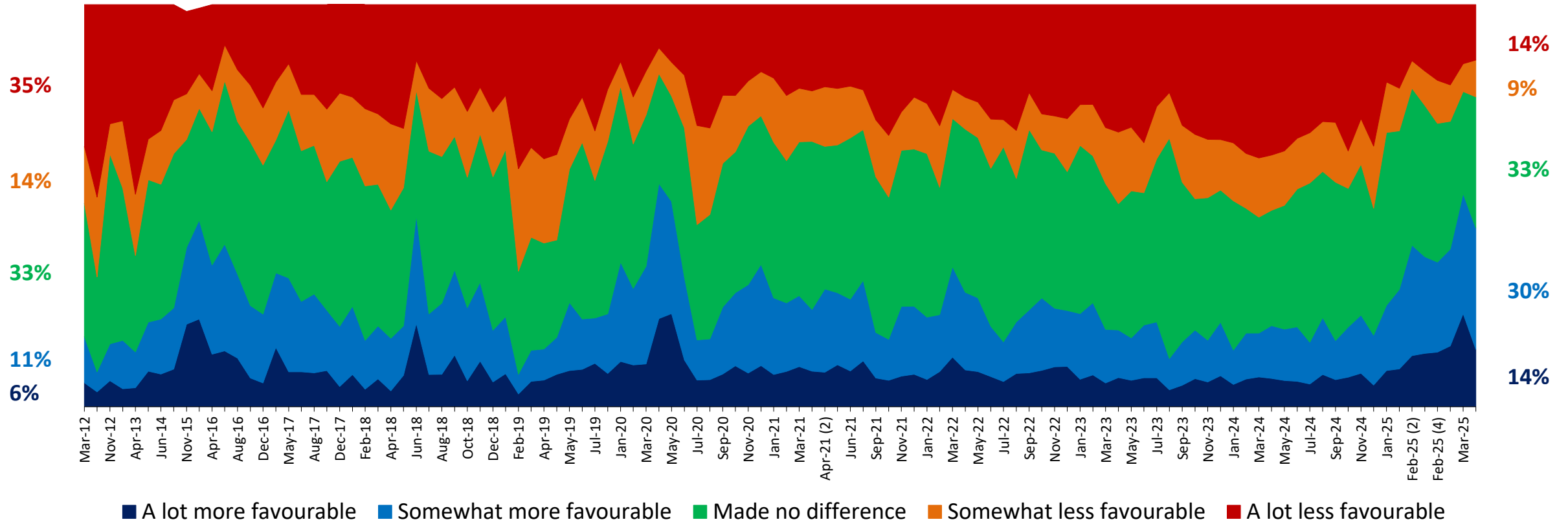
Reaction to Trump

Engagement with U.S.-Canada Relationship:

With 78% of Canadians are at least somewhat closely following U.S.-Canada relations, attention remains high

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; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]

	Very closely	Somewhat closely	Not very closely	Not closely at all	Don't know
Mar. '25 W2	36%	42%	12%	7%	3%
Mar. '25 W1	38%	39%	15%	6%	2%
Feb. '25 W5	33%	39%	17%	9%	2%
Feb. '25 W4	30%	44%	17%	7%	2%
Feb. '25 W3	31%	45%	16%	6%	2%
Feb. '25 W2	35%	45%	13%	5%	2%
Jan. '25 W4	29%	43%	17%	8%	3%
Jan. '25 W3	30%	43%	19%	6%	2%
Jan. '25 W2	25%	42%	20%	9%	5%
Nov. '24	32%	39%	17%	9%	3%
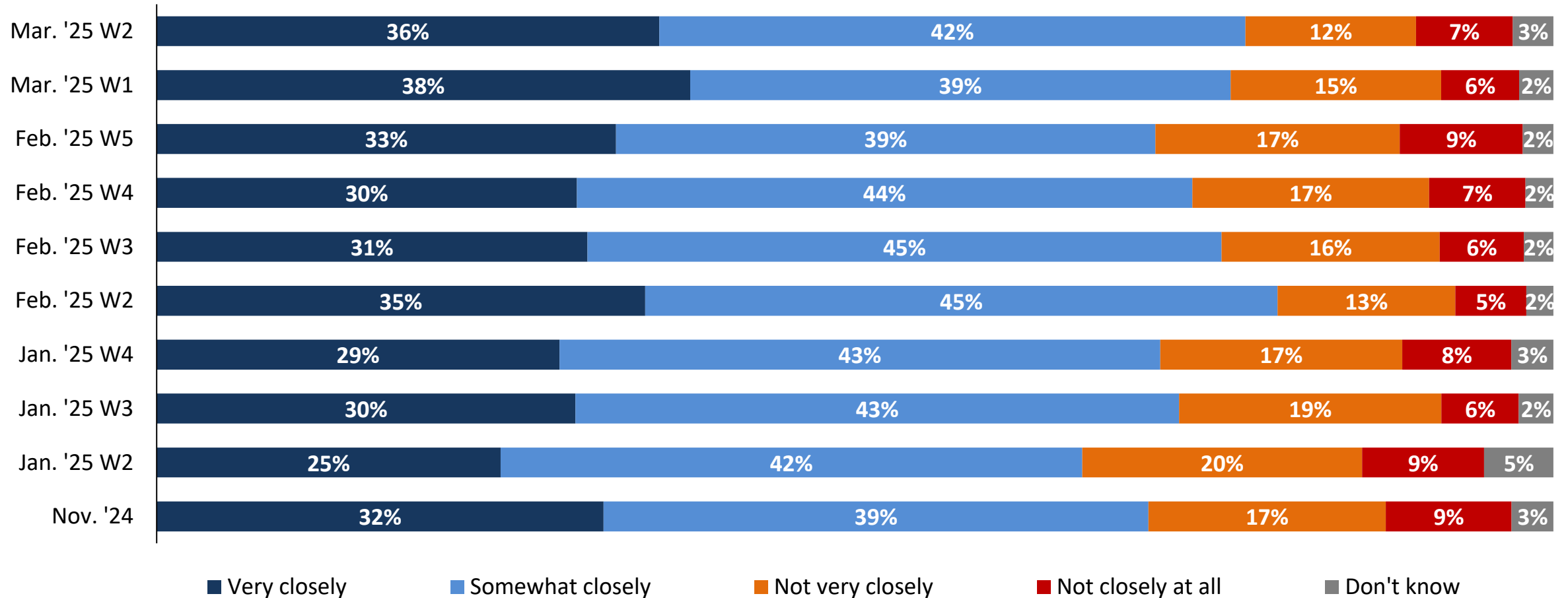
Note: Question wording in Jan.'25 W3 and Nov.'24 was "How closely are you following the news about Donald J. Trump becoming the President of the United States?" Question wording in Jan. '25 W4 was "How closely are you following the news about the relationship between Canada and the U.S. now that Donald J. Trump is becoming the President of the United States?"

Attitude Towards President Trump:
Trump's election as US President leaves 60% of Canadians feeling afraid, easing slightly

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; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]

Net Excited

	Very excited	Somewhat excited	A mix of excited and afraid	Somewhat afraid	Mostly afraid	Neither	Don't know	Net Excited
Mar. '25 W2	7%	8%	14%	12%	48%	8%	4%	-46%
Mar. '25 W1	5%	7%	14%	14%	50%	8%	3%	-52%
Feb. '25 W5	7%	6%	14%	16%	45%	10%	2%	-48%
Feb. '25 W4	7%	9%	12%	14%	47%	8%	3%	-46%
Feb. '25 W3	6%	8%	15%	14%	46%	8%	2%	-46%
Feb. '25 W2	6%	9%	15%	16%	43%	9%	3%	-43%
Jan. '25 W4	7%	9%	18%	17%	36%	10%	3%	-37%
Jan. '25 W3	8%	12%	17%	17%	36%	8%	3%	-33%
Jan. '25 W2	7%	9%	15%	17%	38%	10%	4%	-39%
Nov. '24	11%	10%	14%	15%	37%	9%	4%	-31%

■ Very excited ■ Somewhat excited ■ A mix of excited and afraid ■ Somewhat afraid ■ Mostly afraid ■ Neither ■ Don't know

Federal Leadership Approval:

Net approval of the Federal government retreats but still strongly positive at +31

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; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]
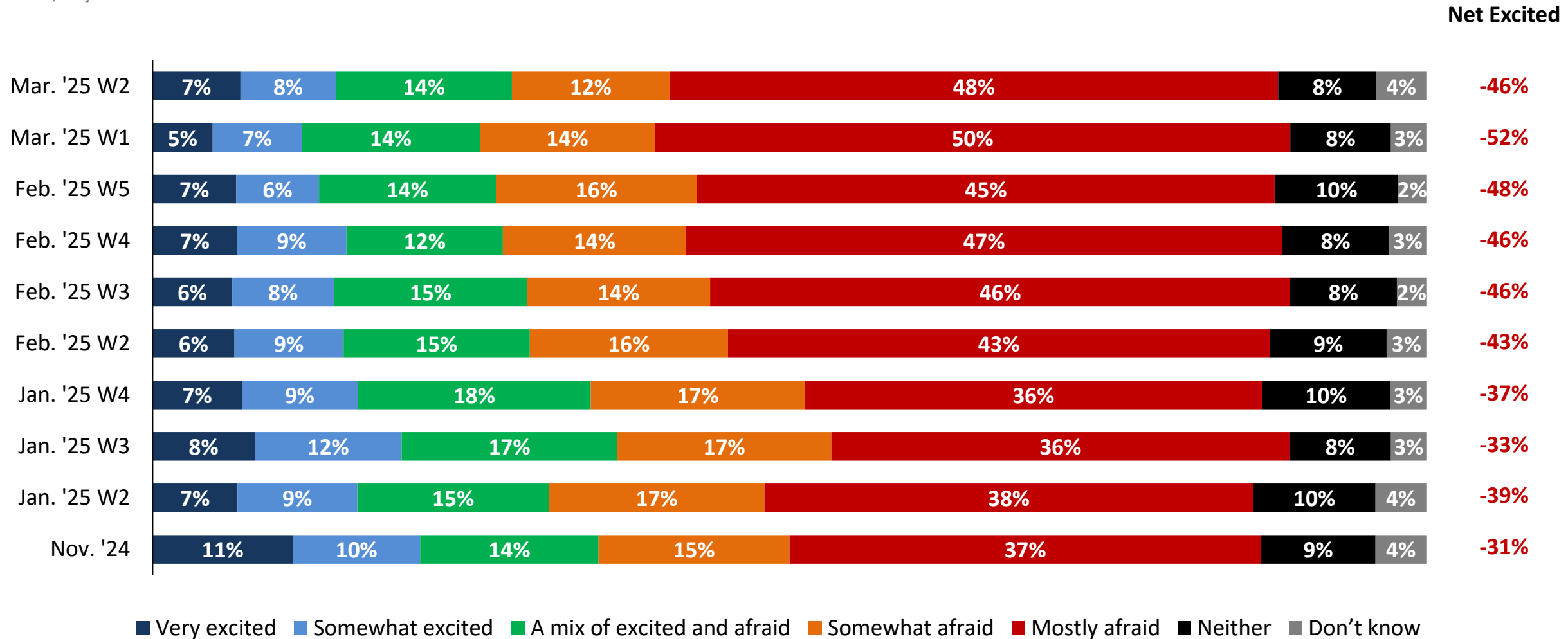
Net Approval

Wave	Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know	Net Approval
Mar. '25 W2	22%	28%	17%	9%	10%	14%	+31%
Mar. '25 W1	27%	29%	15%	8%	9%	12%	+39%
Feb. '25 W5	16%	25%	19%	13%	12%	16%	+16%
Feb. '25 W4	15%	26%	21%	11%	12%	14%	+18%
Feb. '25 W3	17%	25%	22%	9%	12%	17%	+21%
Feb. '25 W2	22%	30%	21%	8%	10%	9%	+34%
Jan. '25 W4	11%	24%	22%	13%	11%	18%	+11%
Jan. '25 W3	11%	24%	26%	15%	12%	12%	+7%

Legend:
- ■ Strongly approve
- ■ Somewhat approve
- ■ Neither approve nor disapprove
- ■ Somewhat disapprove
- ■ Strongly disapprove
- ■ Don't know

Segmentation
Those who say 'Approve'

Age-Gender

M 18-34	48%
M 35-54	51%
M 55+	57%
W 18-34	32%
W 35-54	47%
W 55+	57%

Region

BC	62%
Alberta	48%
Prairies	47%
Ontario	47%
Quebec	46%
Atlantic Canada	60%

Party ID

Liberal	70%
Conservative	43%
NDP	65%
Green/Other	44%
Unaligned	31%

Pierre Poilievre and the Conservatives' Approach:

Net approval is marginally steady at 6 points, coming mainly from men under 54 and not crossing party lines

Q 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; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]
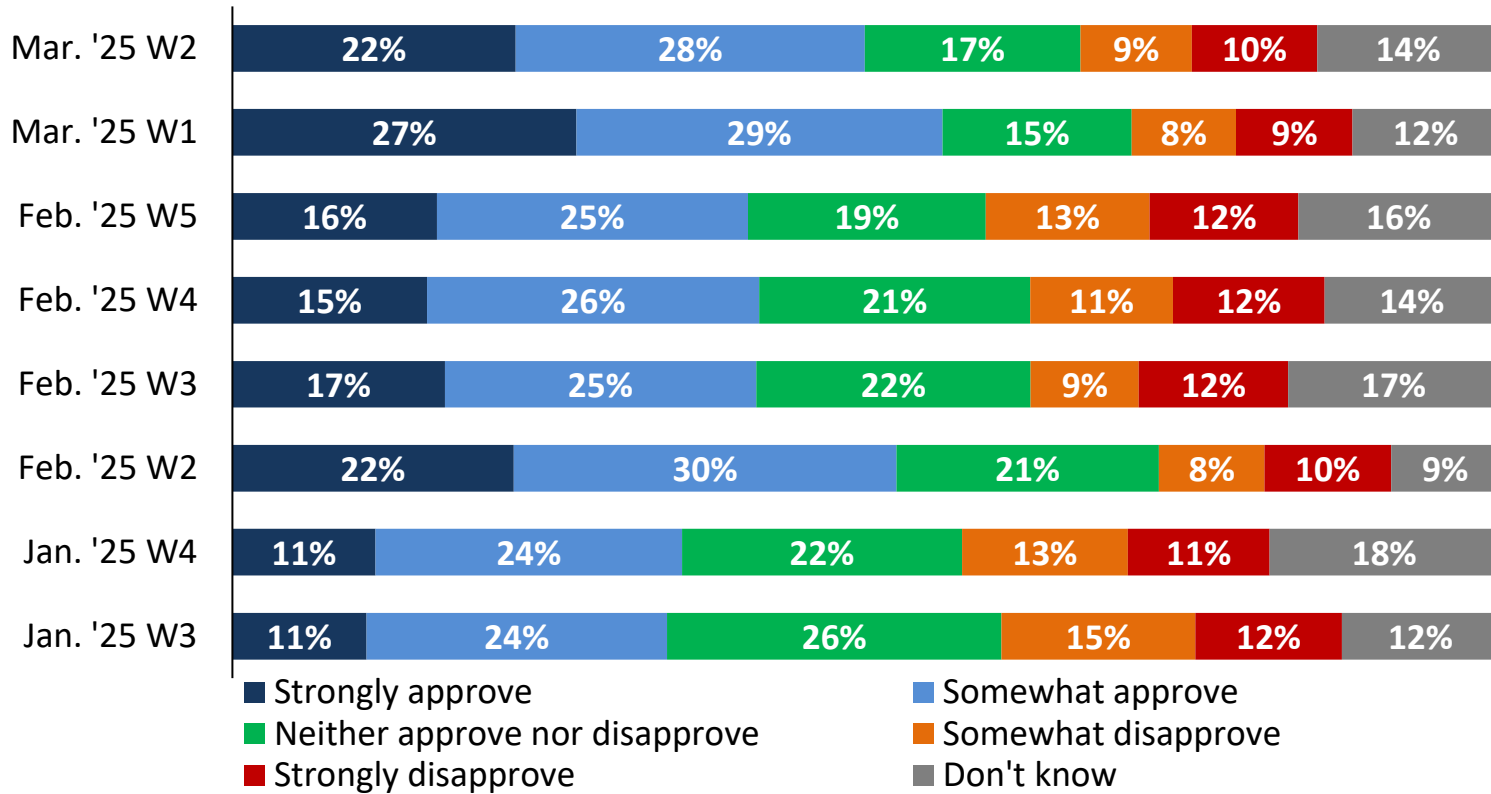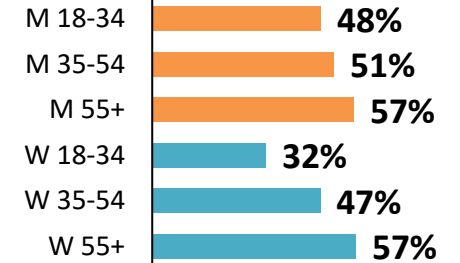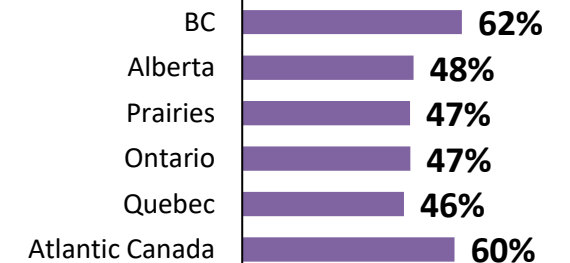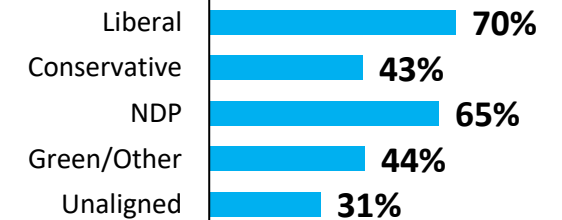
Net Approval

	Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know	Net Approval
Mar. '25 W2	12%	20%	19%	9%	17%	23%	+6%
Mar. '25 W1	13%	17%	20%	10%	15%	25%	+5%
Feb. '25 W5	12%	17%	21%	11%	15%	25%	+3%
Feb. '25 W4	10%	18%	20%	10%	17%	25%	0%
Feb. '25 W3	10%	18%	23%	11%	16%	22%	+1%
Feb. '25 W2	12%	16%	18%	7%	14%	32%	+6%
Jan. '25 W4	10%	20%	22%	8%	12%	28%	+9%
Jan. '25 W3	10%	15%	19%	8%	13%	35%	+3%

Legend:
- ■ Strongly approve
- ■ Somewhat approve
- ■ Neither approve nor disapprove
- ■ Somewhat disapprove
- ■ Strongly disapprove
- ■ Don't know

Segmentation
Those who say 'Approve'

Age-Gender
M 18-34	49%
M 35-54	44%
M 55+	35%
W 18-34	22%
W 35-54	23%
W 55+	26%

Region
BC	39%
Alberta	38%
Prairies	37%
Ontario	34%
Quebec	24%
Atlantic Canada	33%

Party ID
Liberal	25%
Conservative	65%
NDP	13%
Green/Other	21%
Unaligned	10%

Responding to Tariffs

Canadians' concern about tariffs:

81% of Canadians remain at least somewhat concerned over Trump's tariff threats

Q How concerned are you about the possibility of Donald Trump imposing a 25% tariff on Canadian imports to the US?
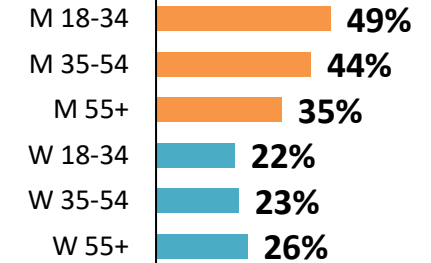[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]
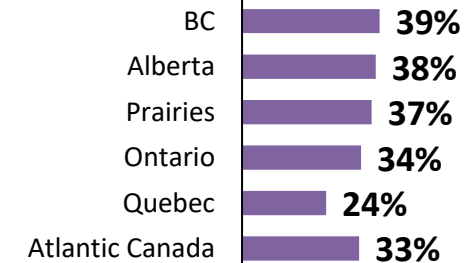
Total Concerned

	Very concerned	Somewhat concerned	Not very concerned	Not at all concerned	Don't know	Total Concerned
Mar. '25 W2	47%	33%	10%	4%	5%	**81%**
Mar. '25 W1	53%	31%	8%	3%	6%	**84%**
Feb. '25 W5	46%	34%	10%	5%	5%	**80%**
Feb. '25 W4	45%	35%	11%	4%	4%	**80%**
Feb. '25 W3	48%	32%	10%	4%	5%	**80%**
Feb. '25 W2	48%	35%	9%	4%	5%	**83%**
Jan. '25 W4	42%	36%	12%	4%	6%	**78%**
Jan. '25 W3	37%	39%	12%	5%	7%	**76%**

■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not at all concerned ■ Don't know
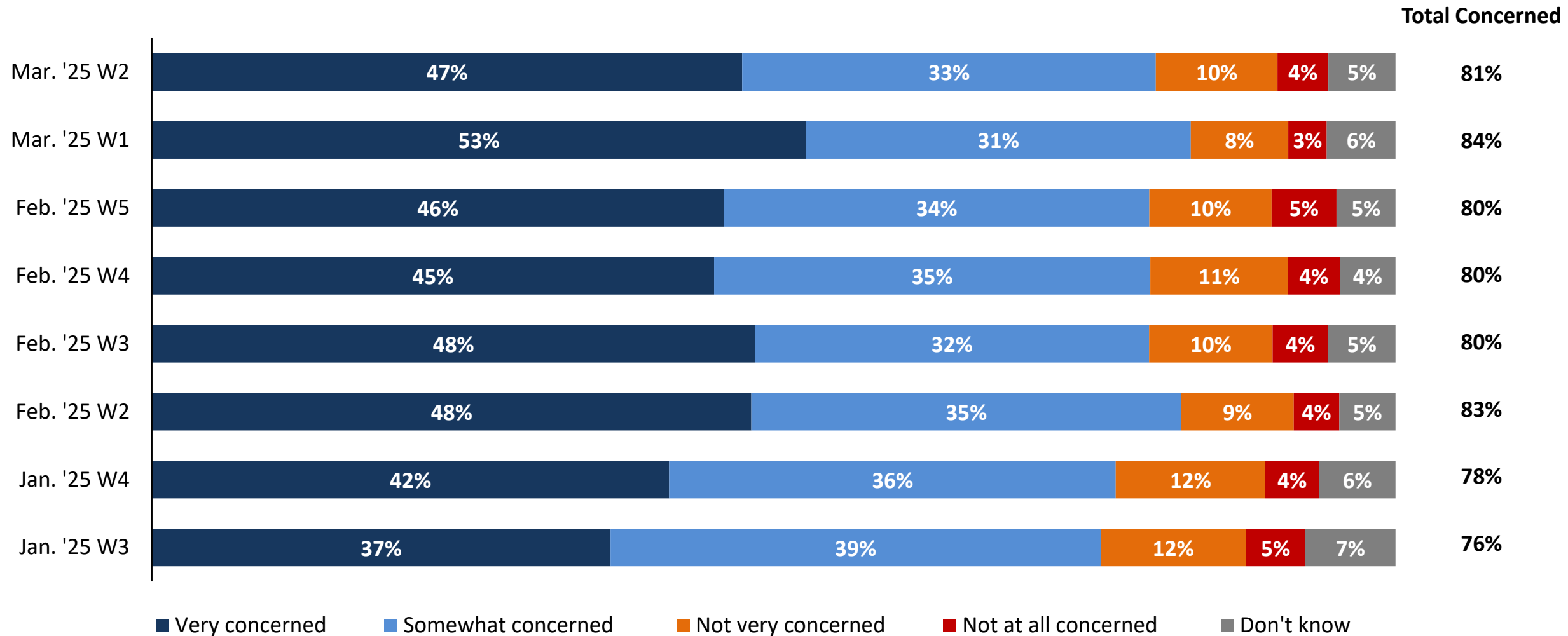
How Canada can respond to tariff threats (more cautious statements):
More than half are willing to be patient believe we should be careful of long-term consequences

Q When thinking about the ways the Canadian government can respond to the tariff threats posed by Donald Trump, do you agree or disagree with the following statements?
[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]

Net Agreement

Since US tariffs on Canadian goods will raise the cost of living in the US, Canada should be patient and wait for US consumers and businesses to put pressure on Trump to remove those tariffs.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agreement
Mar. '25 W2	23%	30%	22%	10%	8%	8%	+35%
Mar. '25 W1	23%	32%	19%	11%	8%	6%	+36%
Feb. '25 W2	20%	32%	21%	10%	8%	10%	+33%
Jan. '25 W4	20%	30%	22%	11%	7%	10%	+31%
Jan. '25 W3	17%	31%	23%	11%	7%	11%	+30%

Given the jobs and long-term economic benefits created by Canada's oil and gas exports, we should be careful not to take actions in the short run that could hurt our long-term relationship.

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know	Net Agreement
Mar. '25 W2	20%	31%	23%	10%	7%	9%	+33%
Mar. '25 W1	19%	29%	23%	13%	8%	7%	+27%
Feb. '25 W2	19%	32%	21%	10%	7%	10%	+35%
Jan. '25 W4	21%	34%	23%	8%	6%	9%	+40%
Jan. '25 W3	22%	34%	22%	9%	3%	9%	+43%

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

How Canada can respond to tariff threats (more aggressive statements):
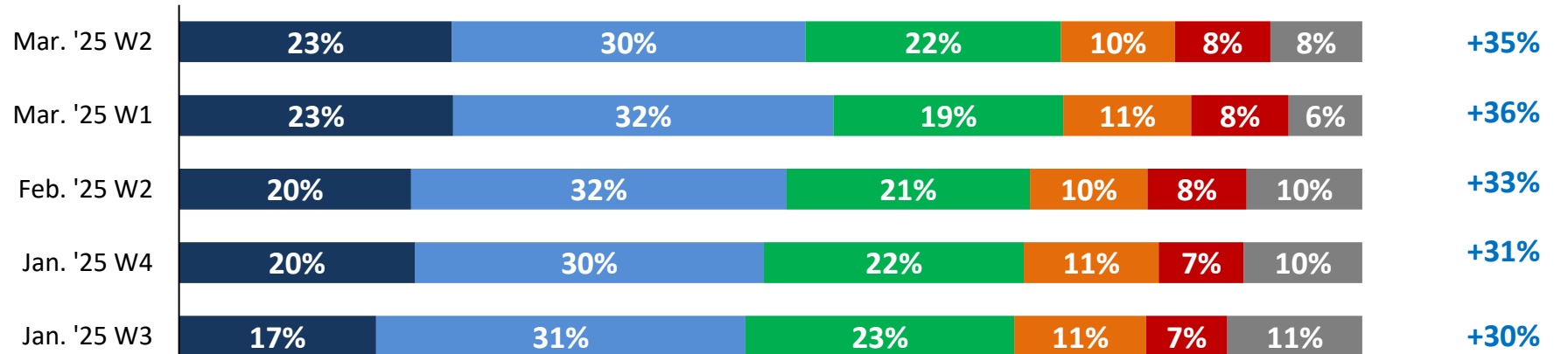## Less strong agreement for matching tariffs and reducing dependence on US

Q When thinking about the ways the Canadian government can respond to the tariff threats posed by Donald Trump, do you agree or disagree with the following statements?
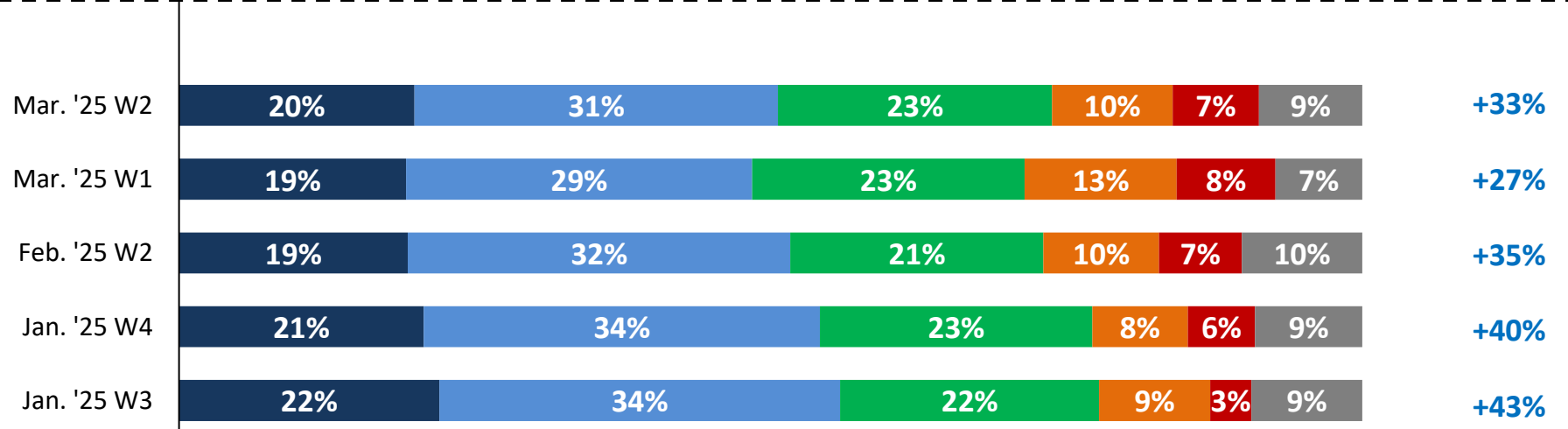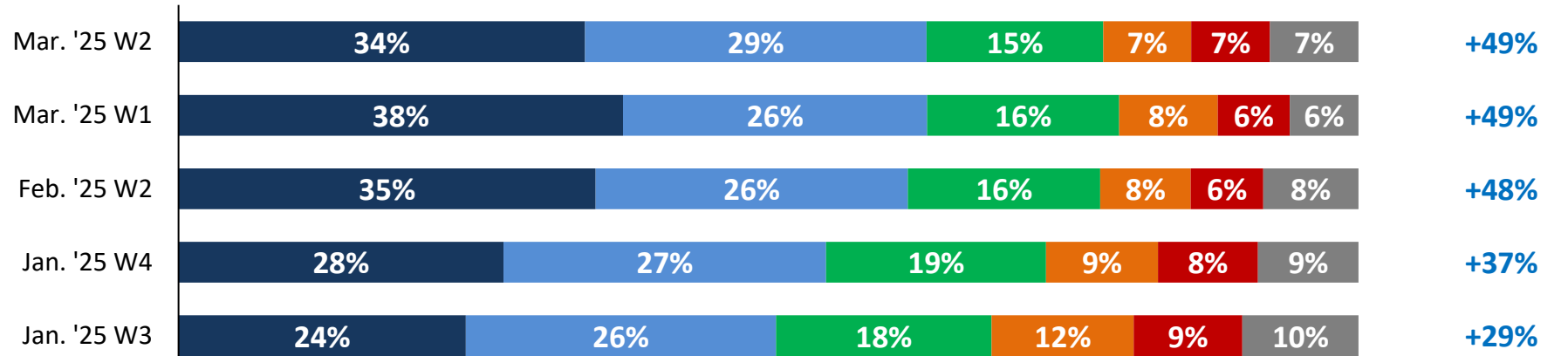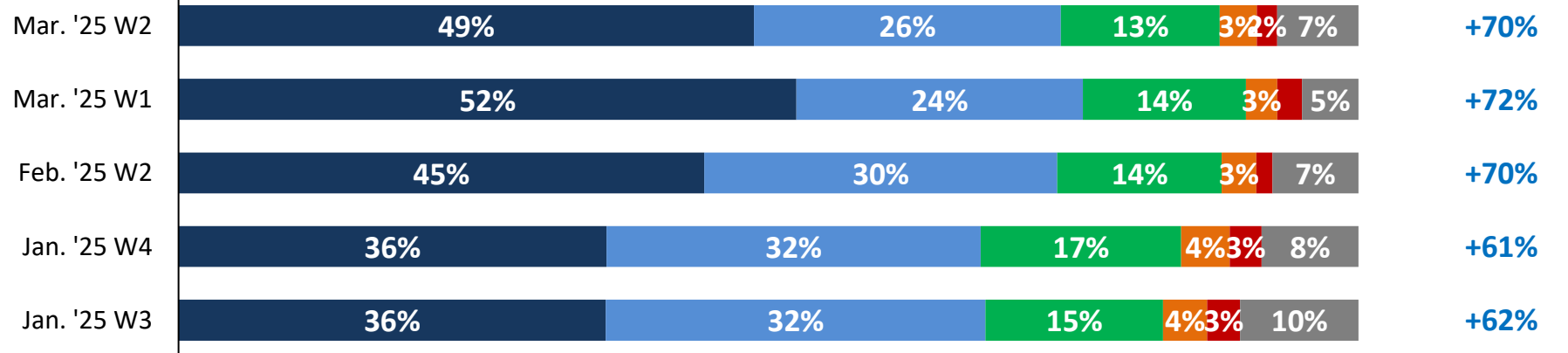[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W1 n=1,000]

Net Agreement

The only way to make a bully like Trump back down is to match his tariffs on Canadian products with our own tariffs on American products, even if that raises prices for Canadian consumers.

	Strongly agree	Somewhat agree	Neither	Somewhat disagree	Strongly disagree	Don't know	Net Agreement
Mar. '25 W2	34%	29%	15%	7%	7%	7%	+49%
Mar. '25 W1	38%	26%	16%	8%	6%	6%	+49%
Feb. '25 W2	35%	26%	16%	8%	6%	8%	+48%
Jan. '25 W4	28%	27%	19%	9%	8%	9%	+37%
Jan. '25 W3	24%	26%	18%	12%	9%	10%	+29%

Donald Trump's tariff threat has highlighted the need for Canada to increase the amount we export overseas and to reduce our economic dependence on the US.

	Strongly agree	Somewhat agree	Neither	Somewhat disagree	Strongly disagree	Don't know	Net Agreement
Mar. '25 W2	49%	26%	13%	3%	2%	7%	+70%
Mar. '25 W1	52%	24%	14%	3%		5%	+72%
Feb. '25 W2	45%	30%	14%	3%		7%	+70%
Jan. '25 W4	36%	32%	17%	4%	3%	8%	+61%
Jan. '25 W3	36%	32%	15%	4%	3%	10%	+62%

■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree
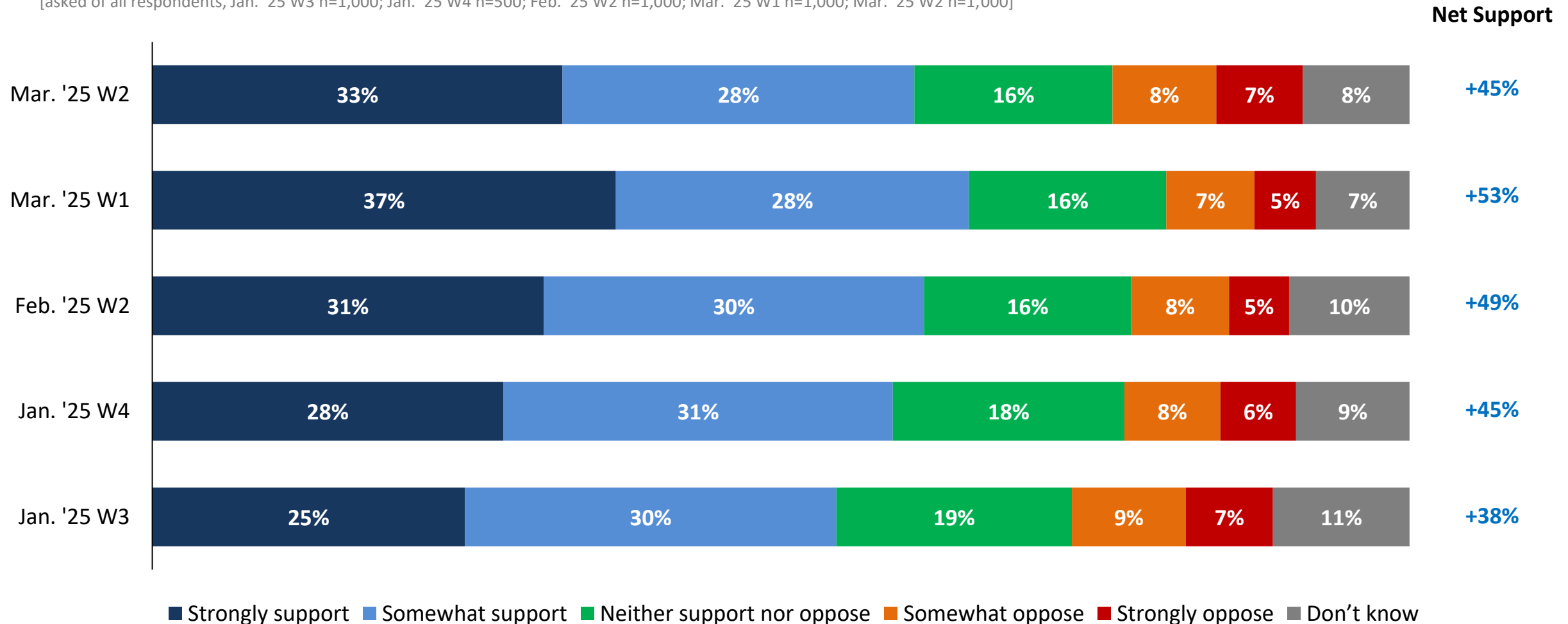■ Somewhat disagree ■ Strongly disagree ■ Don't know

Canadians' support for banning export of critical products:
Strong support for banning critical Canadian products export to the US slips this week

Q If the US imposes tariffs on Canadians exports to the US, some people have suggested that Canada cut off exports of key Canadian products, products such as car parts, electricity or oil and gas. Would you support or oppose the federal government banning the export of critical products to the US if the US places tariffs on Canadian exports to the US?
[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]

Net Support

Date	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose	Don't know	Net Support
Mar. '25 W2	33%	28%	16%	8%	7%	8%	+45%
Mar. '25 W1	37%	28%	16%	7%	5%	7%	+53%
Feb. '25 W2	31%	30%	16%	8%	5%	10%	+49%
Jan. '25 W4	28%	31%	18%	8%	6%	9%	+45%
Jan. '25 W3	25%	30%	19%	9%	7%	11%	+38%

■ Strongly support ■ Somewhat support ■ Neither support nor oppose ■ Somewhat oppose ■ Strongly oppose ■ Don't know

Best Leader for Canada-US Relations:

Carney rebounds from last week's decline, now holds 5-point lead and best to handle Canada-US relations
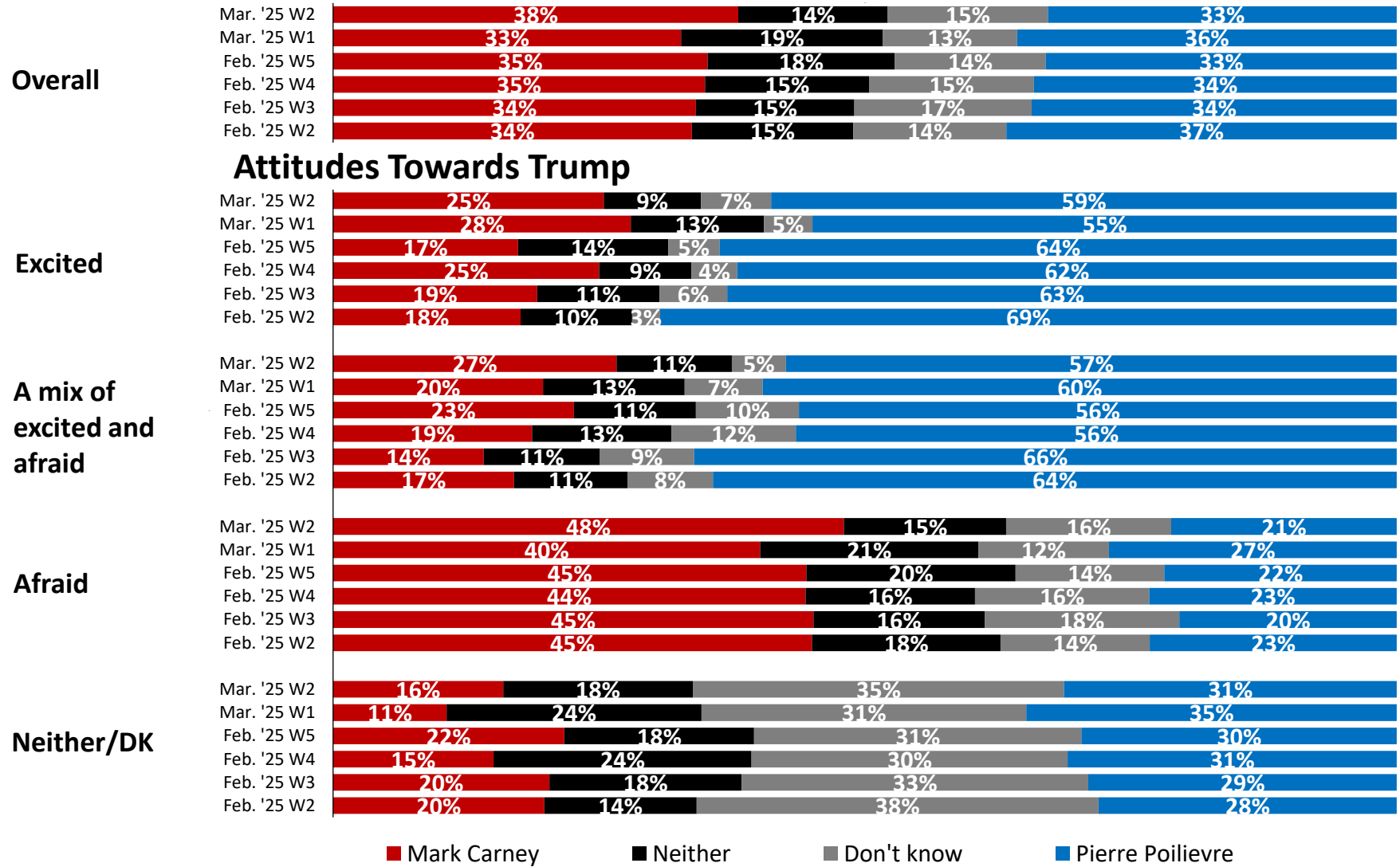
Q Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency? BY ATTITUDE TOWARDS TRUMP
[asked of all respondents, Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000]

Overall

	Mark Carney	Neither	Don't know	Pierre Poilievre
Mar. '25 W2	38%	14%	15%	33%
Mar. '25 W1	33%	19%	13%	36%
Feb. '25 W5	35%	18%	14%	33%
Feb. '25 W4	35%	15%	15%	34%
Feb. '25 W3	34%	15%	17%	34%
Feb. '25 W2	34%	15%	14%	37%

Attitudes Towards Trump

Excited

Mar. '25 W2	25%	9%	7%	59%
Mar. '25 W1	28%	13%	5%	55%
Feb. '25 W5	17%	14%	5%	64%
Feb. '25 W4	25%	9%	4%	62%
Feb. '25 W3	19%	11%	6%	63%
Feb. '25 W2	18%	10%	3%	69%

A mix of excited and afraid

Mar. '25 W2	27%	11%	5%	57%
Mar. '25 W1	20%	13%	7%	60%
Feb. '25 W5	23%	11%	10%	56%
Feb. '25 W4	19%	13%	12%	56%
Feb. '25 W3	14%	11%	9%	66%
Feb. '25 W2	17%	11%	8%	64%

Afraid

Mar. '25 W2	48%	15%	16%	21%
Mar. '25 W1	40%	21%	12%	27%
Feb. '25 W5	45%	20%	14%	22%
Feb. '25 W4	44%	16%	16%	23%
Feb. '25 W3	45%	16%	18%	20%
Feb. '25 W2	45%	18%	14%	23%

Neither/DK

Mar. '25 W2	16%	18%	35%	31%
Mar. '25 W1	11%	24%	31%	35%
Feb. '25 W5	22%	18%	31%	30%
Feb. '25 W4	15%	24%	30%	31%
Feb. '25 W3	20%	18%	33%	29%
Feb. '25 W2	20%	14%	38%	28%

Mark Carney · **Pierre Poilievre**

Legend: ■ Mark Carney ■ Neither ■ Don't know ■ Pierre Poilievre

Methodology

Survey Methodology

These are the results of an online survey conducted between March 11th and March 13th, 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 sample. 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=1,558 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

Field Dates: March 11th and March 13th, 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	165	10.6%	133	13.4%
Men 35-54	288	18.6%	158	16.0%
Men 55+	315	20.3%	189	19.0%
Women 18-34	175	11.3%	131	13.2%
Women 35-54	257	16.6%	164	16.5%
Women 55+	350	22.6%	217	21.8%
British Columbia	214	13.7%	139	13.9%
Alberta	222	14.2%	114	11.4%
Prairies	115	7.4%	64	6.4%
Ontario	571	36.6%	386	38.6%
Québec	271	17.4%	230	23.0%
Atlantic	165	10.6%	67	6.7%

For more information, please contact:

Greg Lyle
President
(t) 416-642-6429
(e) glyle@innovativeresearch.ca

Building Understanding.

INNOVATIVE
RESEARCH GROUP