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Canada This Month

Federal Election

Public Opinion Research
Release Date: April 2nd, 2025
Field Dates: March 26th to March 31st, 2025

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Study Overview

Building from findings off previous waves, this report tracks:

- **Federal vote intentions**

- **Federal leadership**

- **Reaction to Trump**

Summary

1   **For the second consecutive wave, the federal race remains marginally tied between the Liberal Party and the Conservative Party**. While Liberals maintain their gain from last week, the Conservatives regained their loss from last week and are back at 38%.

2   **The Conservatives have narrowed the Liberal momentum gap. The Liberal campaign is still scoring more points with more people, but their advantage is much smaller.** The Liberal lead on awareness has dropped from 18 points to 7 points. The Liberal advantage on campaign impact has dropped from 26 points more positive than the CPC to 9 points.

3   **Part of the momentum shift may be a reflection of some small intensity shifts in the battle of the ballot questions.** Passion equals action in politics. The number of people who reported being mostly afraid of Trump dropped 5-points while the numbers who strongly agree it is time for change grew by 6-points.

4   **Poilievre rebounded on leadership vs Carney.** As in vote, on leadership favourables Poilievre regained last week's losses while Carney held steady. On Best to be PM, Carney's 8-point lead from last week slipped to 2-points this week as Poilievre regained all his losses and Carney slipped slightly from his peak. However, Carney (43%) remains the preferred leader over Poilievre (33%) on handling Canada-U.S relations

5   **The Liberal gains have left them well-positioned in terms of seats.** The Liberals continue to lead in Quebec and Atlantic Canada. The Liberals and CPC are actually or virtually tied in BC and Ontario.

Key Voter Segments

Federal Party ID (Quebec vs. ROC):
Liberals lead in Quebec over Bloc by 6 points; Conservatives hold a 12-point lead over Liberals in the ROC

Party ID: Quebec
[Respondents in Quebec; n=231]

- Conservative: 13%
- Liberal: 29%
- NDP: 8%
- Bloc: 23%
- Other: 7%
- Unaligned: 20%
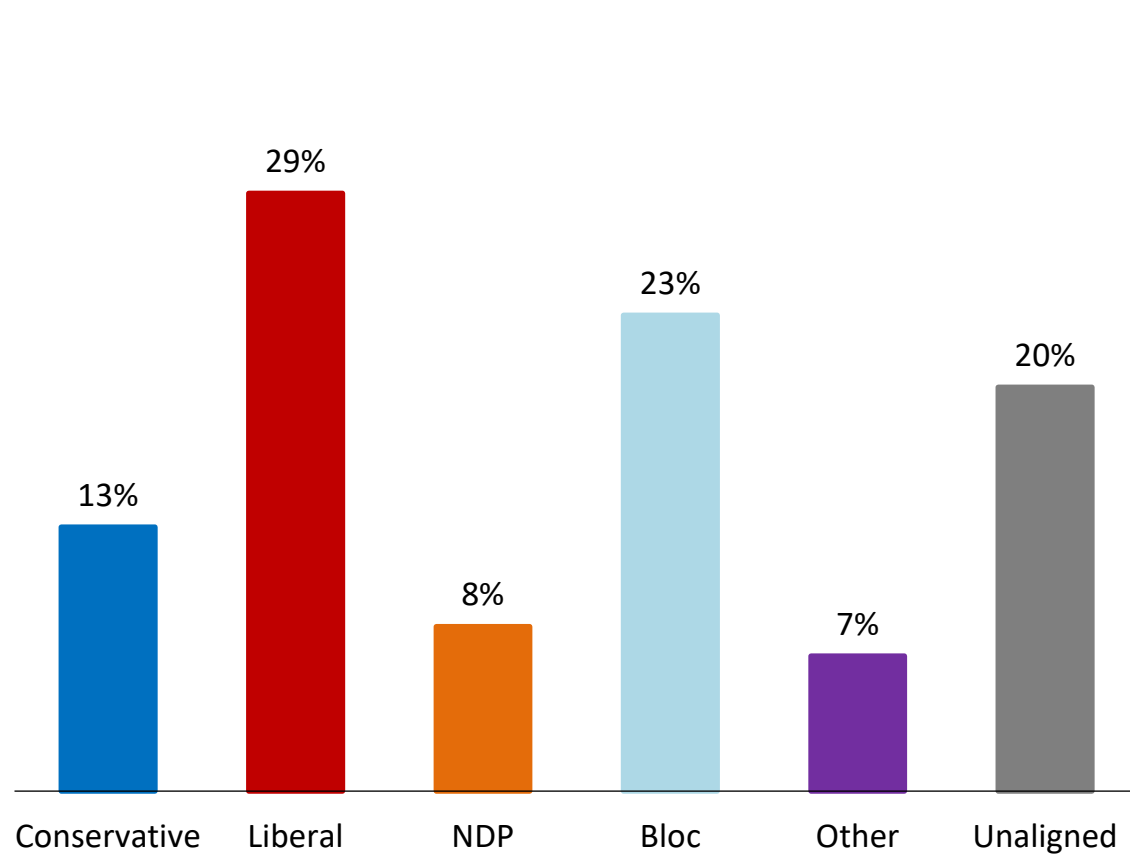
Party ID: Rest of Canada
[Respondents in the rest of Canada; n=769]

- Conservative: 36%
- Liberal: 24%
- NDP: 14%
- Other: 7%
- Unaligned: 19%

Current data: March 2025

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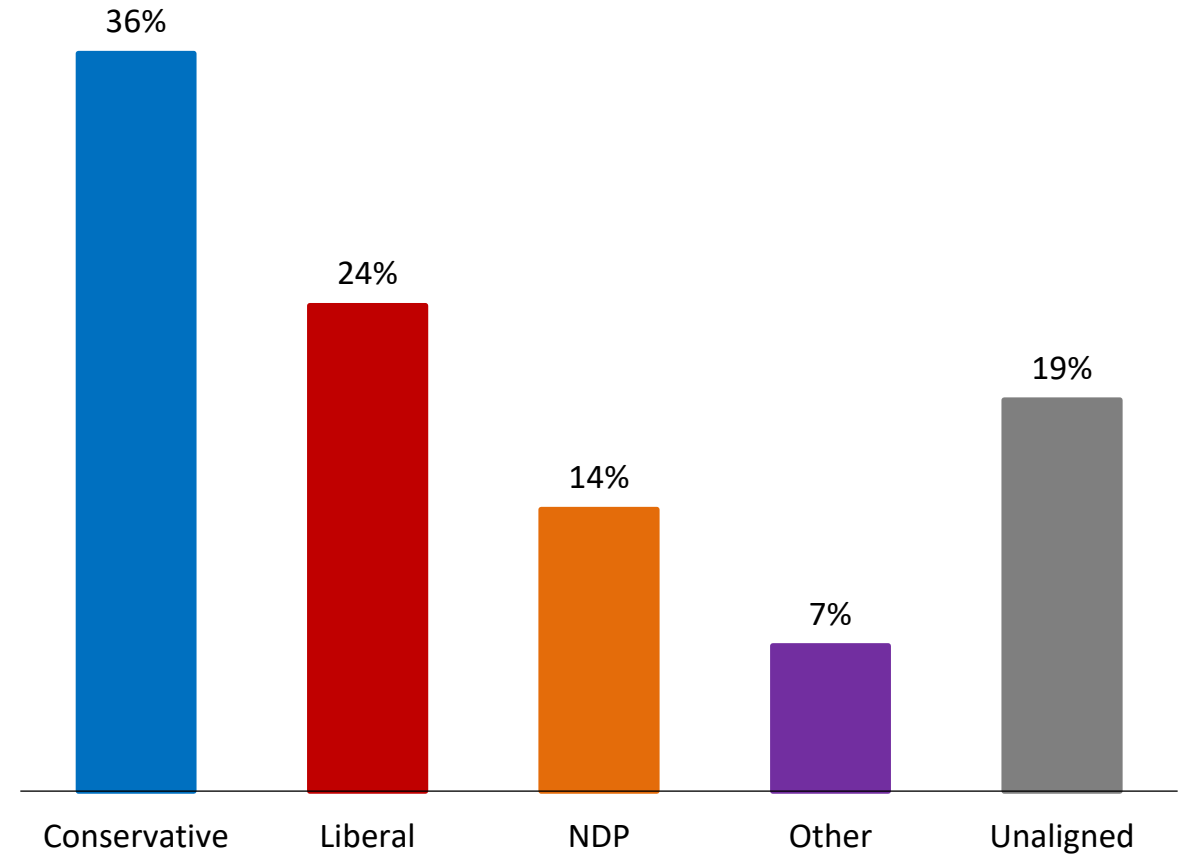
Value Clusters:

To win, any party must build a coalition across conflicting value clusters

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 10%
Business Liberals 23%
Left Liberals 18%
Core Left 17%
Pay-as-you-go Moderates 20%

Current data: March 2025

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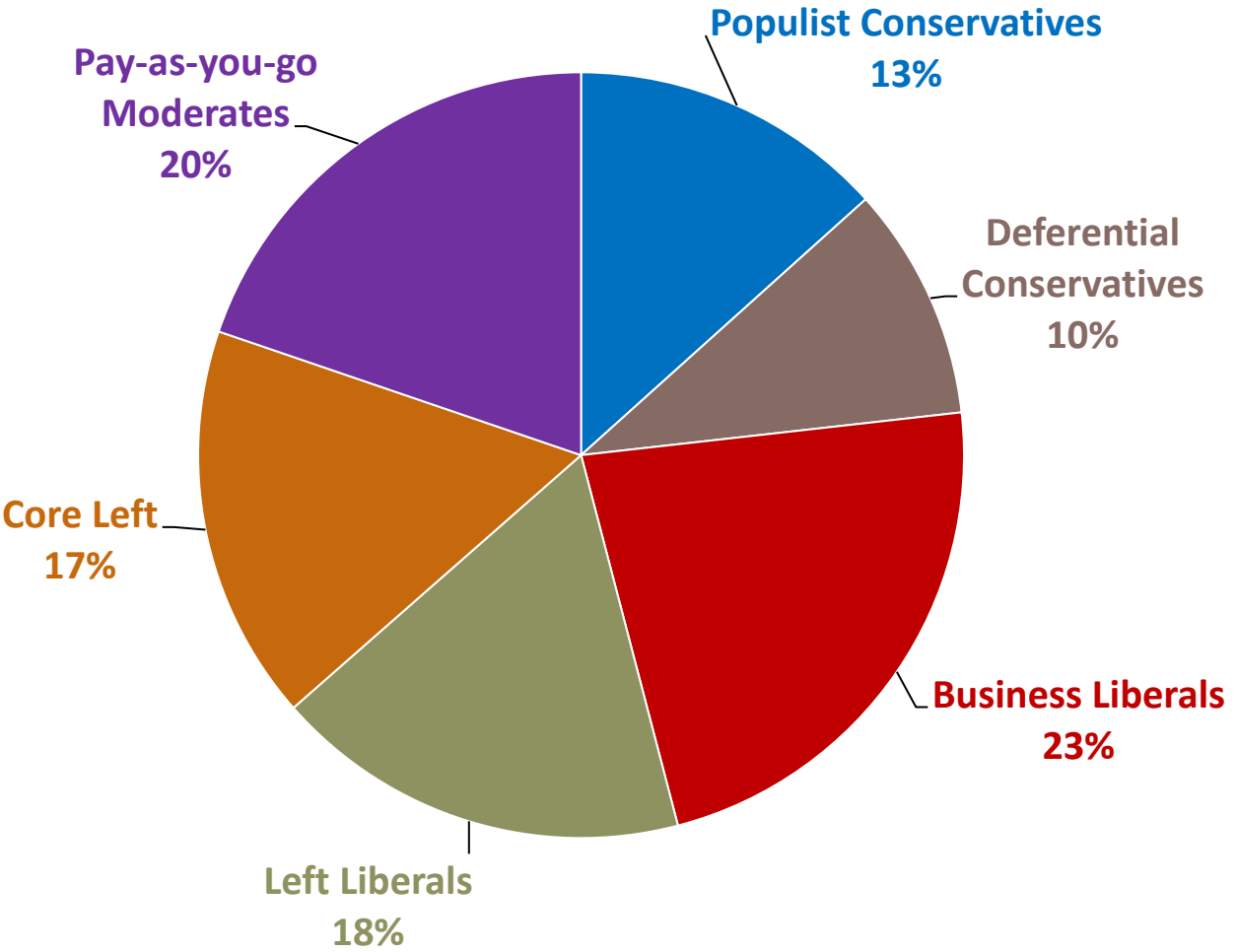
Core Political Values:

Over half believe the government should create equal opportunity and spend based on the public need

Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on…?
[asked of all respondents; n=1000]

- Their ability to afford the programs and services — 36%
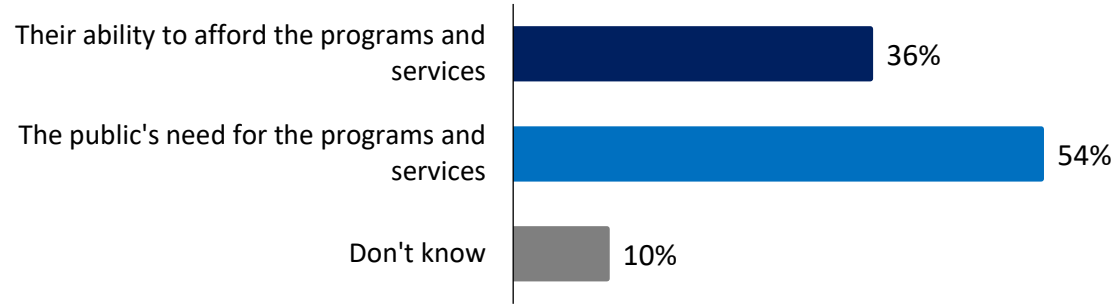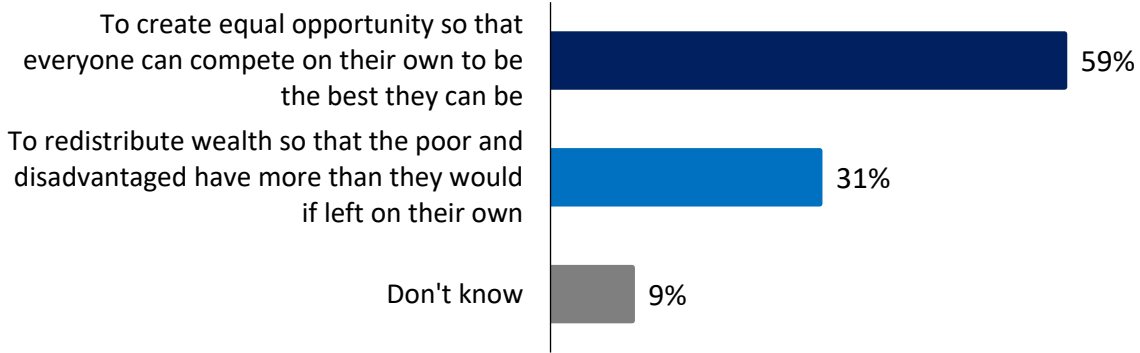- The public's need for the programs and services — 54%
- Don't know — 10%

Q Is the main role of government to…?
[asked of all respondents; n=1000]

- To create equal opportunity so that everyone can compete on their own to be the best they can be — 59%
- To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own — 31%
- Don't know — 9%

Q Which of the following statements comes closest to your view?
[asked of all respondents; n=1000]

- The profit system brings out the worst in human nature — 43%
- The profit system teaches people the value of hard work and success — 44%
- Don't know — 13%
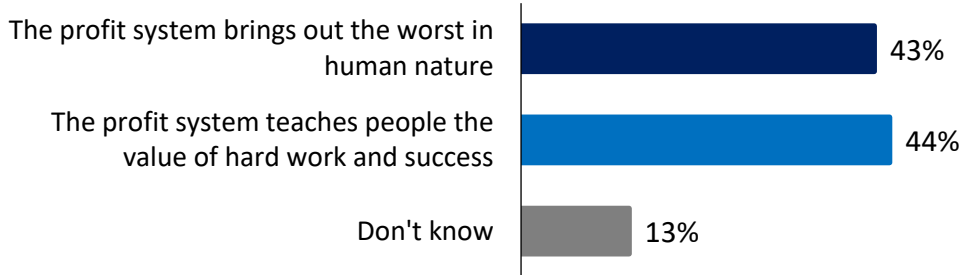
Q When it comes to government decision making, which of the following statements is closest to your view?
[asked of all respondents; n=1000]

- Too often the government listens to experts instead of common sense — 52%
- Provincial issues are complicated so government should listen to experts when it comes to policy — 35%
- Don't know — 12%

Current data: March 2025

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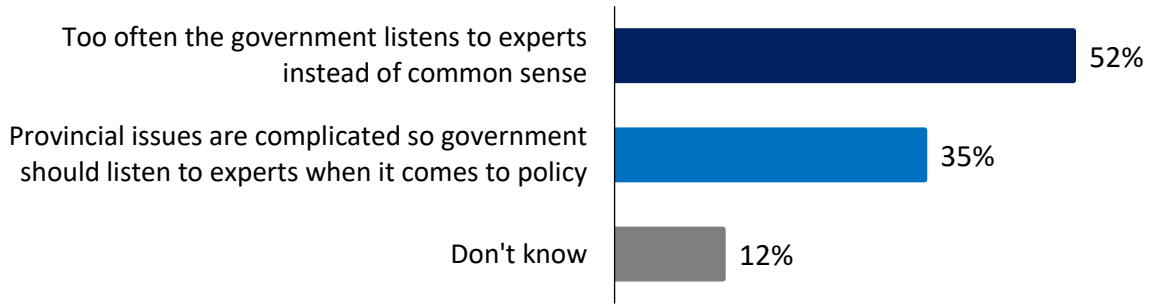
Defining Value Clusters:

Conservatives and Pay-as-you-go more likely to say governments should base decisions on affordability

Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
Governments should base decisions on...	Ability to afford	91%	89%	0%	0%	0%	79%
	Public Need	0%	0%	97%	93%	93%	0%
Is the main role of government to...?	Create equal opportunity	96%	70%	67%	96%	0%	38%
	Redistribute wealth	0%	21%	25%	0%	97%	37%
When it comes to government decision making...	Rely on common sense	100%	0%	44%	57%	46%	57%
	Listen to experts	0%	87%	46%	31%	39%	22%
The profit system...	Brings out the worst in human nature	0%	0%	0%	86%	85%	67%
	Teaches value of hard work and success	93%	97%	90%	0%	0%	11%

Note: Current data: March 2025

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Time for Change

Time for Change Tracking:

6-point increase in strong agreement on 'Time for a change', total agreement at 67%

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 (Oct-15): 6%, 15%, 6%, 12%, 15%, 47%

Right axis values (Mar-25 (4)): 3%, 8%, 7%, 15%, 21%, 46%

X-axis labels: Oct-15, Apr-19, Sep-19, Oct-19, Oct-19 (2), May-20, Jun-20, Jun-20 (2), Jul-20, Aug-20, Aug-20 (2), Sep-20, Oct-20, Mar-21, May-21, Aug-21, Aug-21 (2), Sep-21, Feb-22, Mar-22, Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-22, Jan-23, Apr-23, Jun-23, Oct-23, Nov-23, Dec-23, Jan-24, Feb-24, Mar-24, Apr-24, May-24, Jun-24, Jul-24, Aug-24, Sep-24, Oct-24, Nov-24, Dec-24, Jan-25, Feb-25, Feb-25 (2), Feb-25 (3), Feb-25 (4), Feb-25 (5), Mar-25, Mar-25 (2), Mar-25 (3), Mar-25 (4)

Current data: March 2025

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Time for Change Tracking:

43% of Canadians believe Liberals are the best party to govern – number is steadily increasing since January

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]
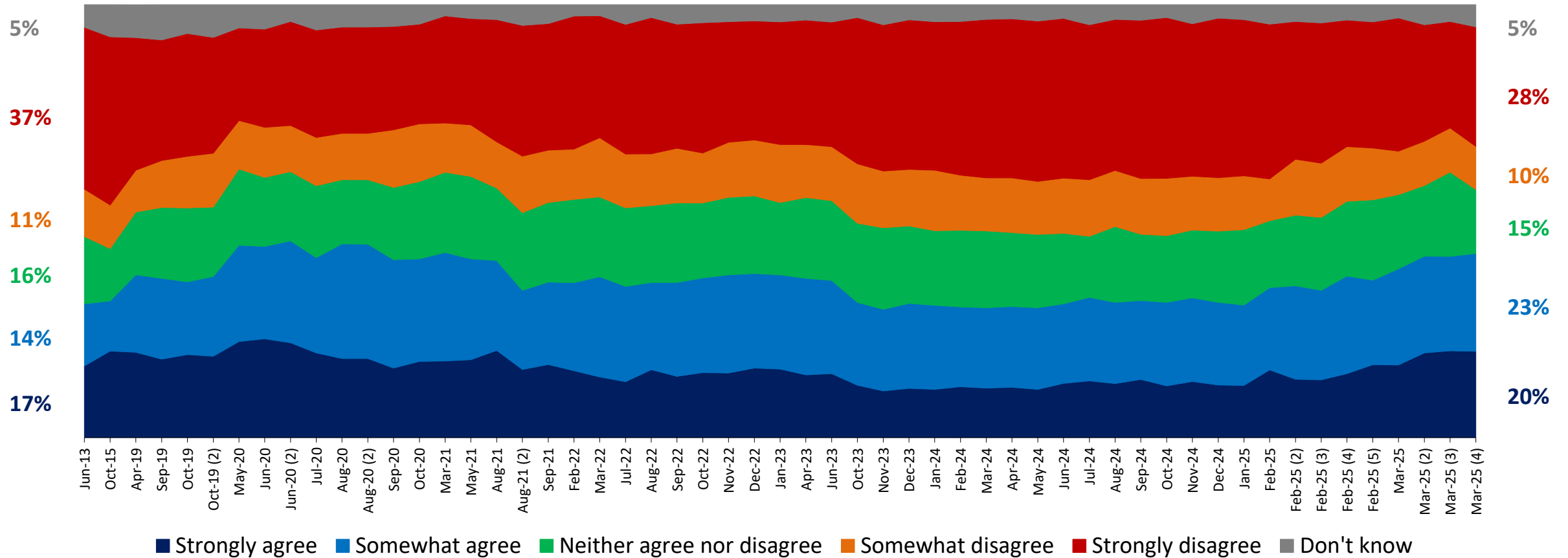

Legend: Strongly agree | Somewhat agree | Neither agree nor disagree | Somewhat disagree | Strongly disagree | Don't know

Left axis labels: 5%, 37%, 11%, 16%, 14%, 17%
Right axis labels: 5%, 28%, 10%, 15%, 23%, 20%

X-axis: Jun-13, Oct-15, Apr-19, Sep-19, Oct-19, Oct-19 (2), May-20, Jun-20, Jun-20 (2), Jul-20, Aug-20, Aug-20 (2), Sep-20, Oct-20, Mar-21, May-21, Aug-21, Aug-21 (2), Sep-21, Feb-22, Mar-22, Jul-22, Aug-22, Sep-22, Oct-22, Nov-22, Dec-22, Jan-23, Apr-23, Jun-23, Oct-23, Nov-23, Dec-23, Jan-24, Feb-24, Mar-24, Apr-24, May-24, Jun-24, Jul-24, Aug-24, Sep-24, Oct-24, Nov-24, Dec-24, Jan-25, Feb-25, Feb-25 (2), Feb-25 (3), Feb-25 (4), Feb-25 (5), Mar-25, Mar-25 (2), Mar-25 (3), Mar-25 (4)

Current data: March 2025

Time for Change Segmentation:

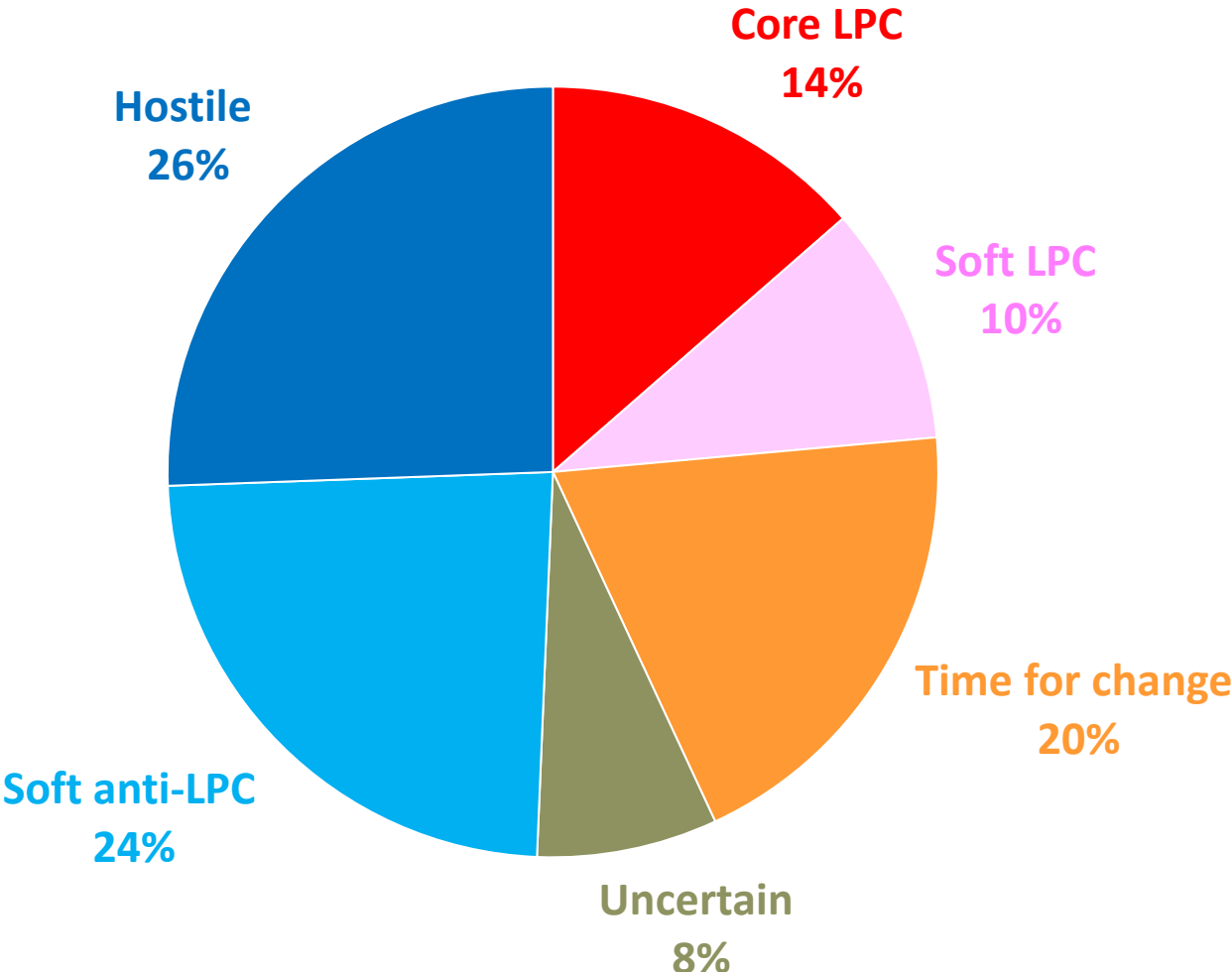## Time for a change Liberals are the critical voter segment in this election

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]

Current data: March 2025

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Campaign Momentum

Campaign Attention And RSH Impact:
Among recent respondents, Blanchet has the highest net favorability, followed by Carney

Q Have you read, seen or heard anything about [LEADER] and the [PARTY] 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 [LEADER] and the [PARTY], or did it make no difference? [asked of all respondents who had read, seen or heard about the party; Liberals, n=586; PCs, n=517; NDP, n=312; Bloc n=49]

RSH in the Past Few Days

Net Favourable

No / Yes

Mark Carney and the Liberals — 41% / 59%
| 20% | 18% | 29% | 8% | 23% | 2% | **+7** |

Pierre Poilievre and the Conservative Party — 48% / 52%
| 19% | 15% | 28% | 9% | 28% | 1% | **-2** |

Jagmeet Singh and the NDP — 69% / 31%
| 10% | 15% | 47% | 9% | 18% | <1% | **-1** |

Yves-François Blanchet and the Bloc* — 79% / 21%
| 22% | 16% | 47% | 5% | 10% | 0% | **+23** |

■ A lot more favourable ■ Somewhat more favourable ■ Made no difference
■ Somewhat less favourable ■ A lot less favourable ■ Don't know
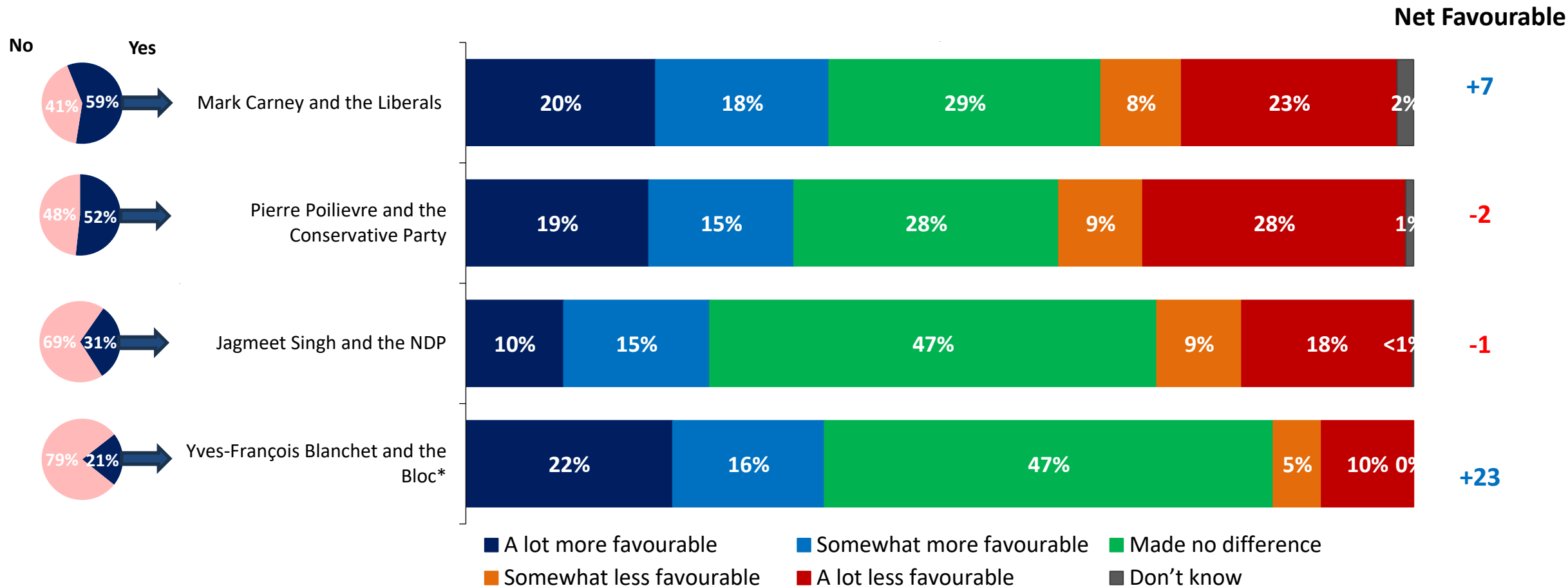
Note: * indicates a small n size.

Federal Vote

Federal Decided Vote Tracking:

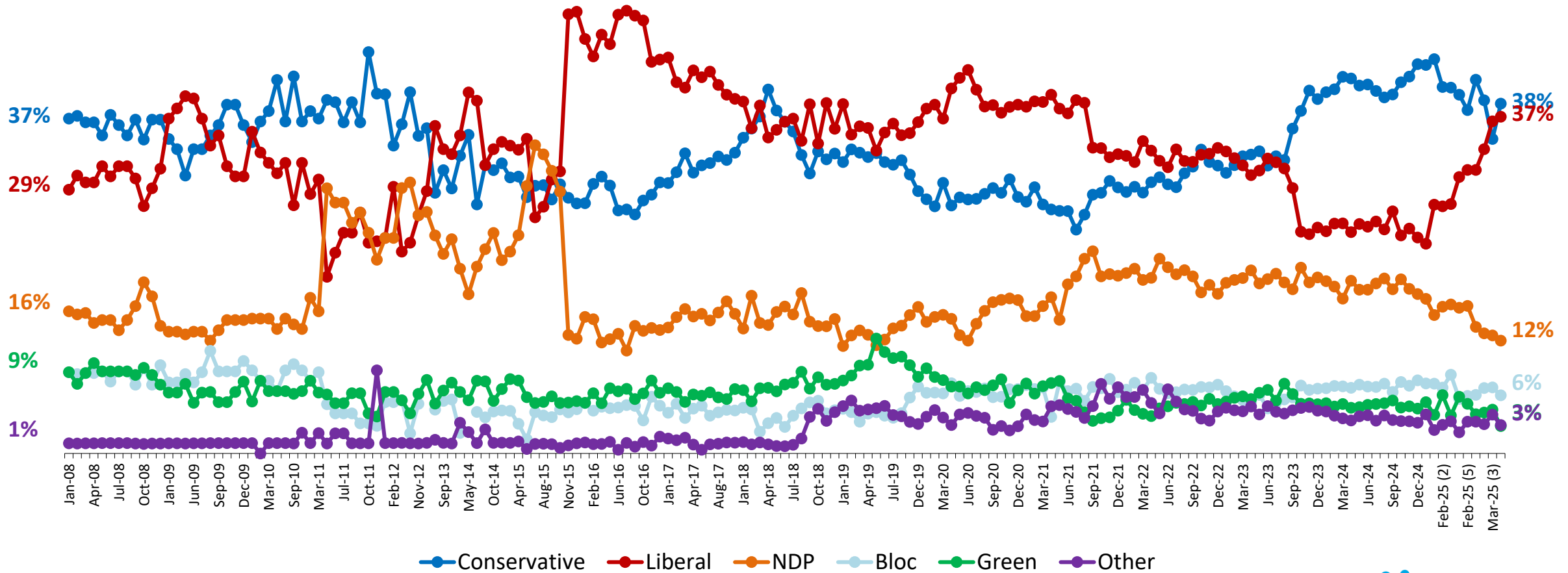## Second consecutive week of a marginally tied race; Conservatives see a 4-point increase to 38%

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]**
[asked only decided voters; n=903]

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

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Decided Vote by REGION:

QC and Atlantic regions show highest Liberal support; Alberta and Prairies more likely to support Conservatives

Decided vote by REGION

REGION

Decided Vote	BC	AB	Prairies	ON	QC	Atlantic
	(N=127)	(N=99)	(N=54)	(N=352)	(N=208)	(N=62)
Conservative	40%	65%	39%	41%	20%	38%
Liberal	38%	18%	33%	41%	36%	48%
NDP	16%	13%	22%	11%	10%	11%
Bloc	0%	0%	0%	0%	28%	0%
Green	4%	2%	2%	4%	2%	2%
Other	2%	2%	4%	4%	4%	1%

Note: Current data: March 2025

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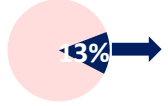
Decided Vote by Value Clusters (March):
Conservatives make up 39% of Pay-as-you-go-Moderates; Liberals have made gains among all segments

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]**
[asked only decided voters: Mar '25 W1 W2 W3 W4 n=3,580]

Populist Conservatives

13%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	68%	17%	4%	3%	2%	5%
Feb '25	72%	11%	6%	5%	1%	5%
Jan '25	76%	9%	6%	3%	2%	4%
Dec '24	75%	10%	7%	1%	2%	5%

Deferential Conservatives

10%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	38%	35%	9%	13%	3%	2%
Feb '25	47%	26%	10%	11%	4%	1%
Jan '25	45%	22%	11%	16%	4%	3%
Dec '24	46%	26%	7%	15%	3%	3%

Business Liberals

23%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	37%	38%	11%	7%	4%	2%
Feb '25	39%	33%	13%	8%	4%	3%
Jan '25	39%	28%	15%	8%	5%	5%
Dec '24	43%	27%	15%	10%	3%	2%

Left Liberals

16%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	31%	38%	17%	4%	4%	5%
Feb '25	33%	31%	21%	5%	6%	4%
Jan '25	34%	26%	22%	6%	7%	5%
Dec '24	40%	24%	21%	6%	6%	5%

Core Left

17%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	21%	43%	21%	8%	5%	2%
Feb '25	18%	38%	28%	6%	7%	3%
Jan '25	21%	26%	33%	8%	7%	4%
Dec '24	24%	29%	28%	8%	8%	3%

Pay-as-you-go-Moderates

20%

Month	Conservative	Liberal	NDP	Bloc	Green	Other
Mar '25	39%	30%	14%	7%	6%	4%
Feb '25	41%	26%	14%	9%	8%	3%
Jan '25	45%	23%	13%	7%	7%	5%
Dec '24	43%	20%	18%	8%	6%	4%

■ Conservative ■ Liberal ■ NDP ■ Bloc ■ Green ■ Other

Decided Vote by Party ID (March):
Liberals and Conservatives have strong support from their base; Liberals are gaining from NDP and Unaligned
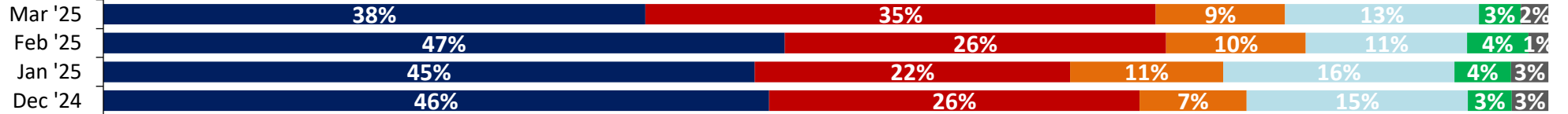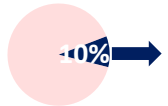
Q If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
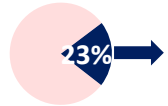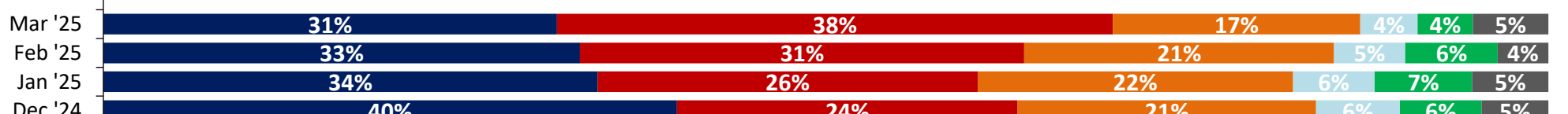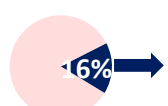[asked only decided voters: Mar '25 W1 W2 W3 W4 n=3,580]

Liberal
- Mar '25: Conservative 7%, Liberal 86%, NDP 5%, 1%, 1%
- Feb '25: Conservative 8%, Liberal 82%, NDP 7%, 1%, 2%, 1%
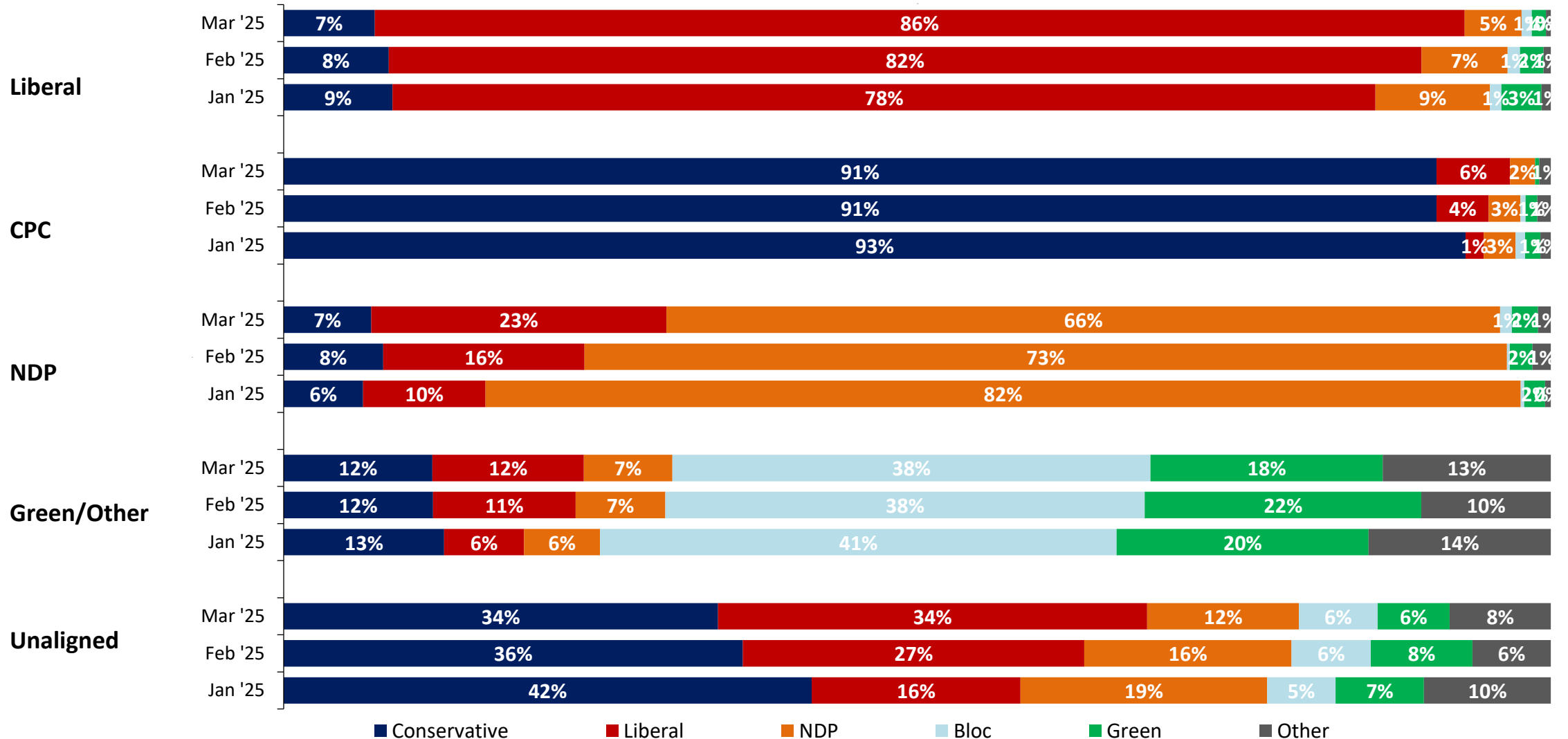- Jan '25: Conservative 9%, Liberal 78%, NDP 9%, 1%, 3%, 1%

CPC
- Mar '25: Conservative 91%, Liberal 6%, 2%, 1%
- Feb '25: Conservative 91%, Liberal 4%, 3%, 1%, 1%
- Jan '25: Conservative 93%, 1%, 3%, 1%

NDP
- Mar '25: Conservative 7%, Liberal 23%, NDP 66%, 1%, 2%, 1%
- Feb '25: Conservative 8%, Liberal 16%, NDP 73%, 2%, 1%
- Jan '25: Conservative 6%, Liberal 10%, NDP 82%, 2%

Green/Other
- Mar '25: Conservative 12%, Liberal 12%, NDP 7%, Bloc 38%, Green 18%, Other 13%
- Feb '25: Conservative 12%, Liberal 11%, NDP 7%, Bloc 38%, Green 22%, Other 10%
- Jan '25: Conservative 13%, Liberal 6%, NDP 6%, Bloc 41%, Green 20%, Other 14%

Unaligned
- Mar '25: Conservative 34%, Liberal 34%, NDP 12%, Bloc 6%, Green 6%, Other 8%
- Feb '25: Conservative 36%, Liberal 27%, NDP 16%, Bloc 6%, Green 8%, Other 6%
- Jan '25: Conservative 42%, Liberal 16%, NDP 19%, Bloc 5%, Green 7%, Other 10%

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

Federal Vote Tracking:

Conservatives and Liberals remain marginally tied; 4-point increase for Conservatives since the last wave

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

Current data: March 2025

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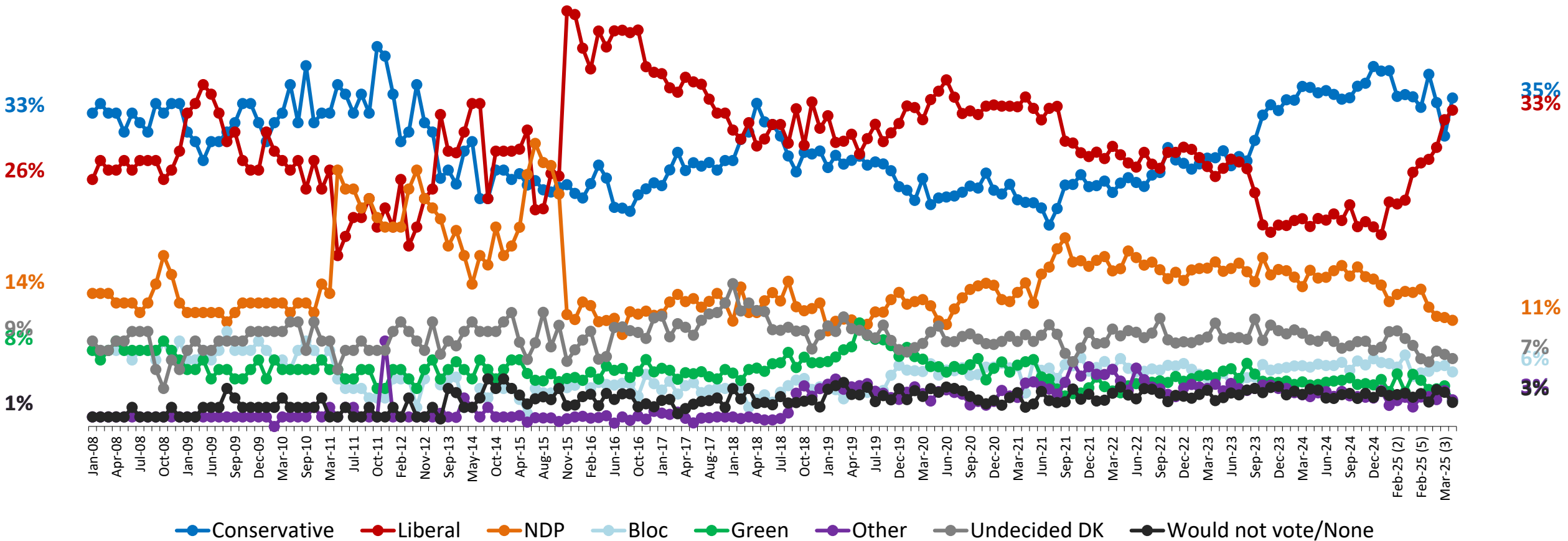
Combined Vote by Value Cluster:

Populist Conservatives and Pay-as-you-go Moderates show the highest support for Conservatives

Value Clusters

Federal Combined Vote	Populist Conservatives (N=133)	Deferential Conservatives (N=99)	Business Liberals (N=227)	Left Liberals (N=176)	Core Left (N=167)	Pay-as-you-go Moderates (N=198)
Conservative	64%	35%	33%	31%	15%	37%
Liberal	21%	32%	36%	38%	42%	27%
NDP	4%	8%	12%	12%	17%	11%
Bloc	3%	14%	8%	2%	7%	3%
Green	0%	2%	4%	2%	3%	4%
Other	5%	2%	2%	5%	1%	2%
Undecided DK	2%	7%	3%	7%	11%	11%
Would not vote/None	0%	0%	2%	2%	4%	5%

Note: Current data: March 2025

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Combined Vote by Time for Change:
Core LPC, Soft LPC, Time for a change and Uncertain show highest support for liberals

Time for Change

	Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
	(N=136)	(N=100)	(N=195)	(N=76)	(N=238)	(N=256)
Conservative	1%	10%	17%	6%	38%	81%
Liberal	89%	68%	52%	24%	10%	1%
NDP	5%	12%	15%	7%	19%	5%
Bloc	3%	3%	3%	10%	11%	4%
Green	2%	1%	5%	6%	3%	1%
Other	0%	0%	3%	5%	3%	4%
Undecided DK	0%	4%	3%	26%	14%	3%
Would not vote/None	0%	2%	1%	15%	3%	1%

Federal Combined Vote

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Combined Vote by Gender and Age:

Men and those middle aged (35-54) are more likely to support the Conservative party

Gender and Age

Federal Combined Vote	Man	Woman	18-34	35-54	55+
	(N=482)	(N=514)	(N=268)	(N=325)	(N=406)
Conservative	39%	30%	33%	36%	34%
Liberal	33%	33%	31%	30%	37%
NDP	10%	13%	14%	12%	9%
Bloc	6%	6%	4%	5%	7%
Green	3%	2%	5%	3%	1%
People's Party	2%	2%	4%	2%	2%
Other	1%	1%	0%	1%	1%
Undecided DK	3%	11%	6%	8%	7%
Would not vote None	2%	3%	4%	2%	2%

Note: Current data: March 2025

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Combined Vote by Firmness of Vote:
Conservatives are the most likely to have made up their mind

Firmness of Vote

Federal Combined Vote	I have heard all I need to make up my mind in this election	I would like to hear more before I finally make up my mind in this election	Don't know
	(N=488)	(N=438)	(N=74)
Conservative	44%	28%	13%
Liberal	37%	31%	18%
NDP	8%	15%	7%
Bloc	5%	7%	4%
Green	1%	4%	6%
People's Party	1%	3%	1%
Other	1%	0%	3%
Undecided DK	0%	11%	28%
Would not vote None	2%	0%	21%

Note: Current data: March 2025

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Federal 2nd Choice Party:
NDP remains in the lead as the second vote choice at 21%

Q And which party would be your second choice?
[asked only decided voters; n=903]

Conservative 2nd Choice	Liberal 2nd Choice	NDP 2nd Choice	Bloc 2nd Choice	Green 2nd Choice	Other 2nd Choice	Undecided	WNV/None
12%	15%	21%	4%	9%	8%	17%	13%

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Current data: March 2025
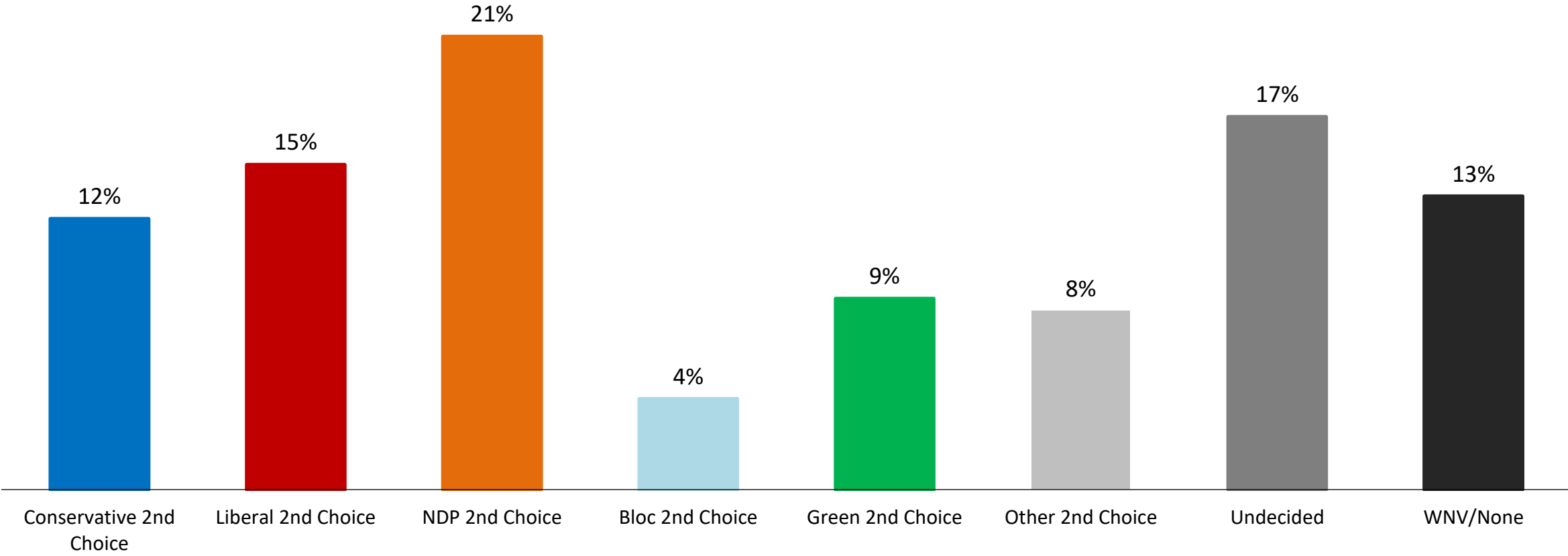
Federal 2nd Choice Party:

46% of those who prefer the NDP as their first choice rank the Liberals as their second choice

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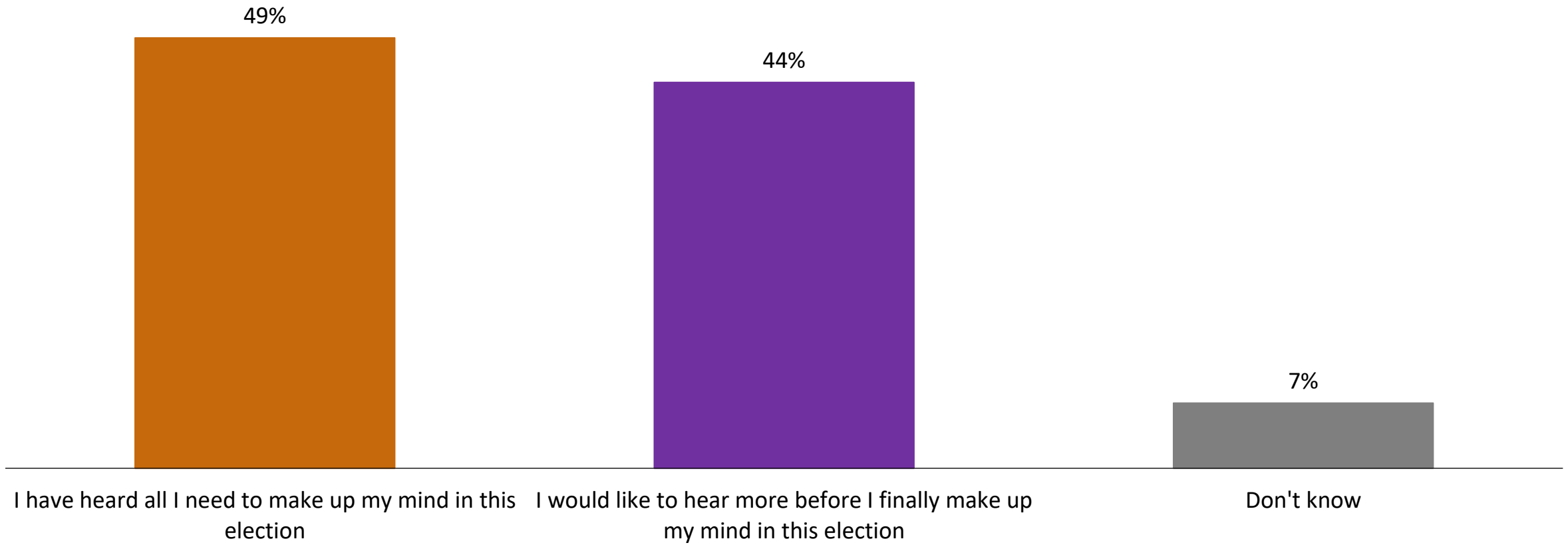
First Choice

Second Choice	Conservative 1st Choice (N=346)	Liberal 1st Choice (N=333)	NDP 1st Choice (N=112)	Bloc 1st Choice (N=57)	Green 1st Choice (N=27)
Conservative 2nd Choice		21%	15%	21%	15%
Liberal 2nd Choice	16%		46%	25%	41%
NDP 2nd Choice	12%	42%		9%	16%
Bloc 2nd Choice	4%	5%	3%		0%
Green 2nd Choice	6%	9%	16%	16%	0%
Other 2nd Choice	17%	2%	2%	5%	12%
Undecided	21%	17%	14%	17%	9%
WNV/None	25%	6%	4%	9%	7%

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

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Firmness of Vote:

Almost half (49%) of Canadians say they have heard all they need to make up their mind in this election

Q Which statement is closest to your view about the upcoming federal election?
[asked of all respondents; n=1000]

I have heard all I need to make up my mind in this election	I would like to hear more before I finally make up my mind in this election	Don't know
49%	44%	7%

Current data: March 2025

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Firmness of Vote Tracking:

Voters are more certain now than they were just before the 2021 election

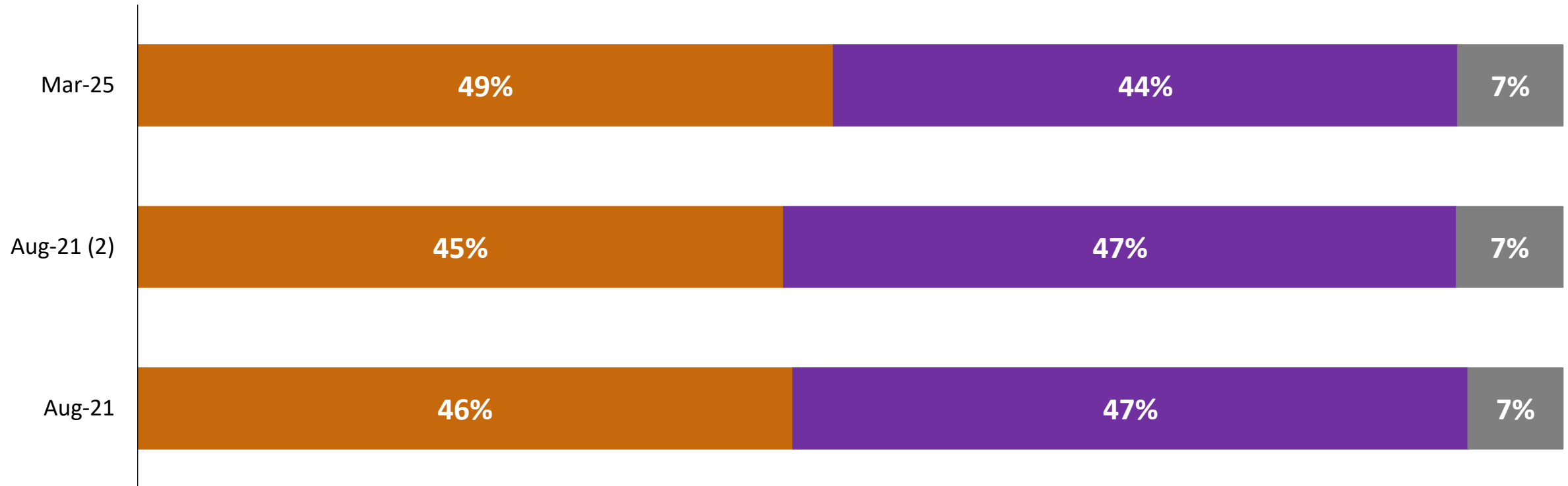**Q** Which statement is closest to your view about the upcoming federal election?
[asked of all respondents; n=1000]

	I have heard all I need	I would like to hear more	Don't know
Mar-25	49%	44%	7%
Aug-21 (2)	45%	47%	7%
Aug-21	46%	47%	7%

■ I have heard all I need to make up my mind in this election

■ I would like to hear more before I finally make up my mind in this election

■ Don't know

Current data: March 2025

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Firmness of Vote:

While two thirds of Conservatives are locked-in, other are open to more information.

Which statement is closest to your view about the upcoming federal election BY [Vote+Lean]

First Choice

Satisficing	Conservative 1st Choice	Liberal 1st Choice	NDP 1st Choice	Bloc 1st Choice
	(N=346)	(N=333)	(N=112)	(N=57)
I have heard all I need to make up my mind in this election	62%	55%	36%	41%
I would like to hear more before I finally make up my mind in this election	35%	41%	59%	54%
Don't know	3%	4%	5%	5%

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

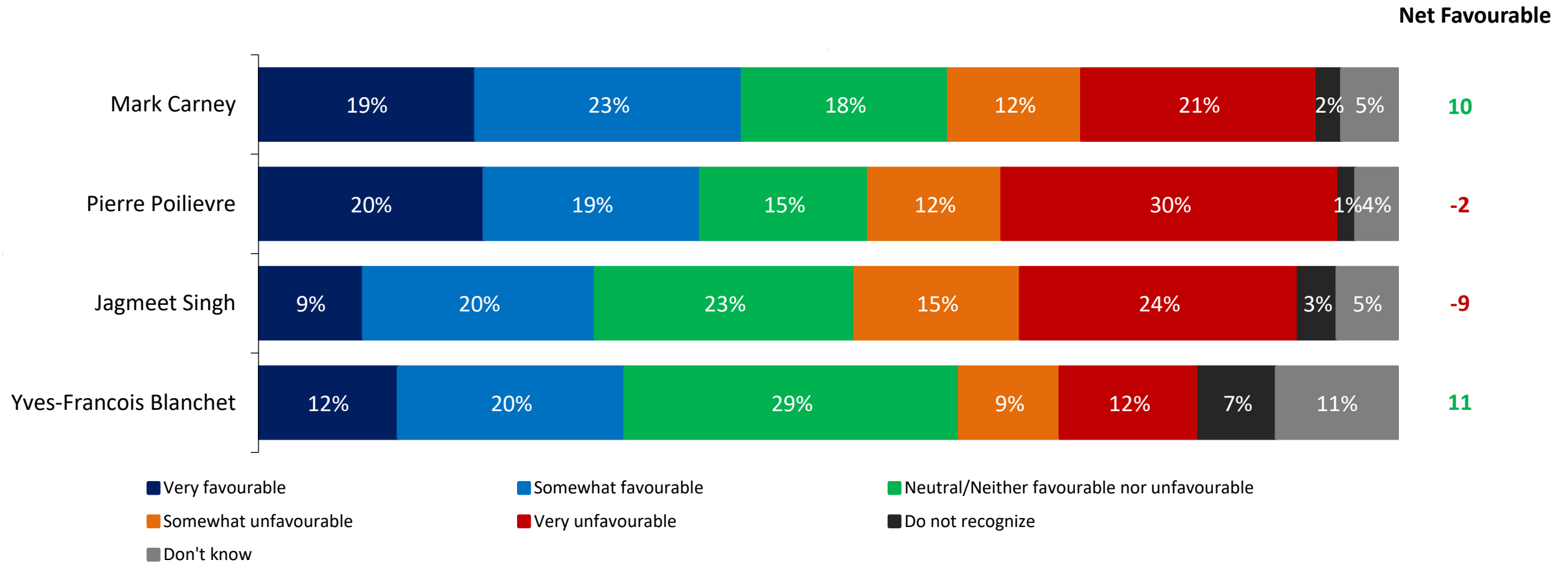INNOVATIVE
RESEARCH GROUP

Leadership

Leader Favourables:

Carney leads in favourability by 4 points and Poilievre leads in unfavourability by 9 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=1000]

Net Favourable

Leader	Very favourable	Somewhat favourable	Neutral	Somewhat unfavourable	Very unfavourable	Do not recognize	Don't know	Net Favourable
Mark Carney	19%	23%	18%	12%	21%	2%	5%	**10**
Pierre Poilievre	20%	19%	15%	12%	30%	1%	4%	**-2**
Jagmeet Singh	9%	20%	23%	15%	24%	3%	5%	**-9**
Yves-Francois Blanchet	12%	20%	29%	9%	12%	7%	11%	**11**

■ Very favourable   ■ Somewhat favourable   ■ Neutral/Neither favourable nor unfavourable

■ Somewhat unfavourable   ■ Very unfavourable   ■ Do not recognize

■ Don't know

Current data: March 2025

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Party Leader NET Favourables Tracking:

Poilievre's NET favourability recovers to the beginning of March levels; Carney's hold steady

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.
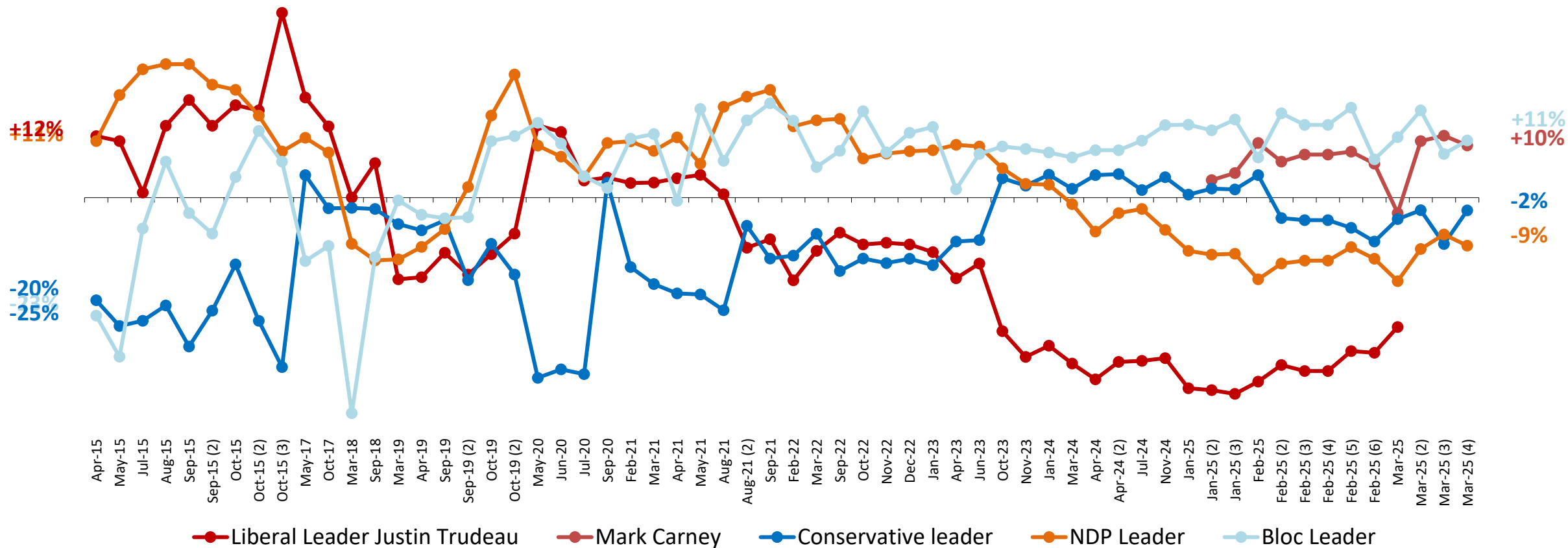[asked of all respondents; n=1000]

| — 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 for Quebec respondents only

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Best Prime Minister:
Carney and Poilievre marginally tied as best Prime Minister

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

Bar chart values:
- Mark Carney of the Liberals: 33%
- Pierre Poilievre of the Conservatives: 32%
- Jagmeet Singh of the NDP: 9%
- Yves-François Blanchet of the Bloc Quebecois: 3%
- Elizabeth May of the Green Party: 2%
- Maxime Bernier of the People's Party: 2%
- Undecided/Don't know: 14%
- None: 4%

Current data: March 2025

INNOVATIVE RESEARCH GROUP
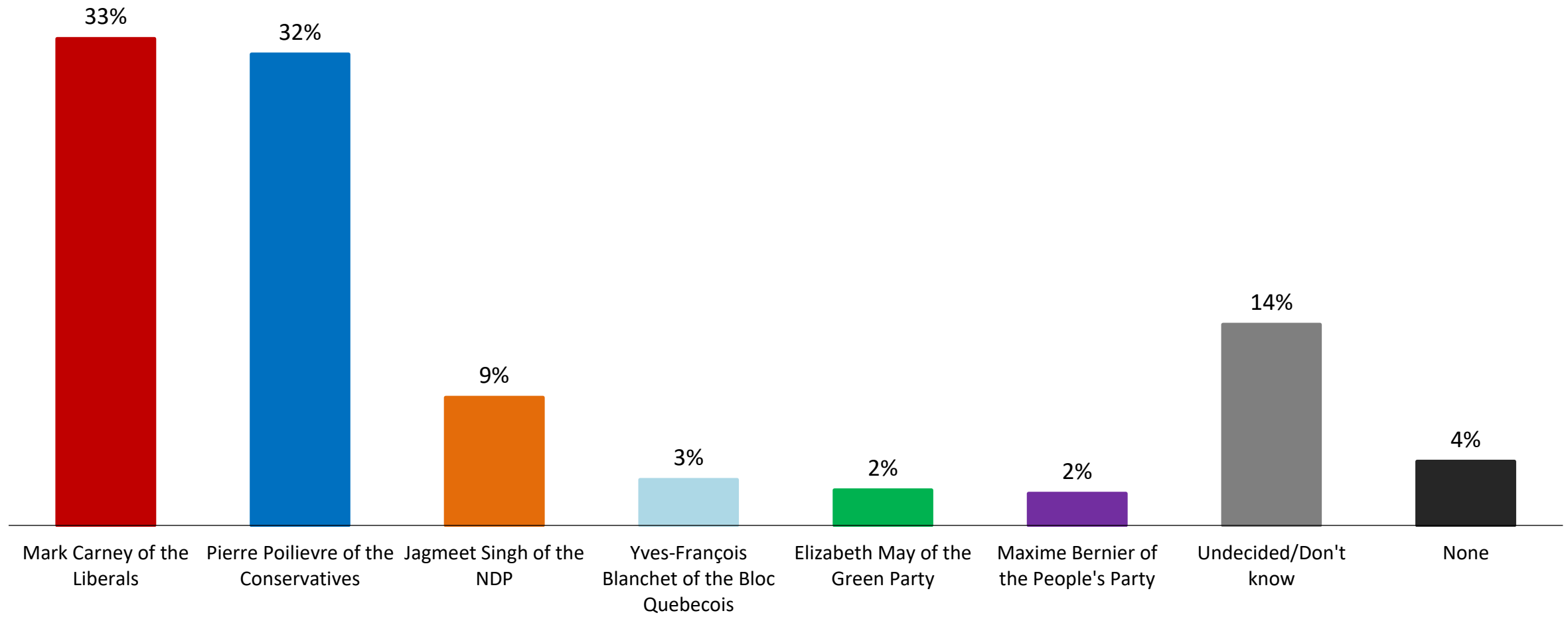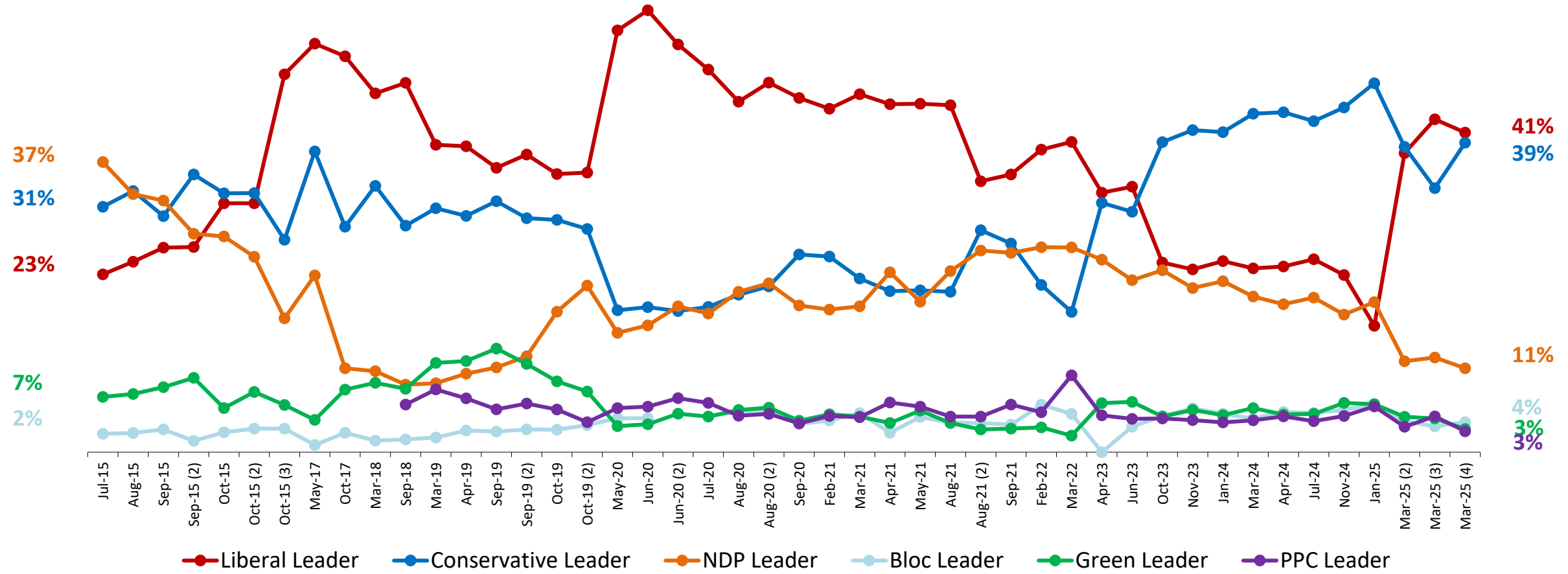
Best Prime Minister Tracking (Decided):
Support for Carney and Poilievre converges, with Poilievre behind 2 points

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked all decided voters; n=903]

Liberal Leader ● Conservative Leader ● NDP Leader ● Bloc Leader ● Green Leader ● PPC Leader

Current data: March 2025

INNOVATIVE
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Best Prime Minister by Quebec vs Rest of Canada:
Carney's support is 33% in Quebec and rest of Canada (33%). Conservatives with 3-point lead in the ROC

Quebec vs Rest of Canada

Best Prime Minister	Quebec (N=231)	Rest of Canada (N=769)
Liberal Leader	33%	33%
Conservative Leader	18%	36%
NDP Leader	11%	8%
Bloc Leader	14%	0%
Green Leader	2%	3%
PPC Leader	3%	2%
Undecided/DK	17%	13%
None	3%	5%

Note: Current data: March 2025

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Best Prime Minister by Region:

Poilievre's stronghold is in Alberta, while Carney leads in other regions

Region

Best Prime Minister	BC	AB	Prairies	ON	QC	Atlantic
	(N=139)	(N=111)	(N=64)	(N=387)	(N=231)	(N=67)
Liberal Leader	36%	17%	29%	37%	33%	38%
Conservative Leader	32%	57%	28%	35%	18%	30%
NDP Leader	9%	5%	10%	9%	11%	6%
Bloc Leader	0%	0%	0%	0%	14%	0%
Green Leader	3%	2%	4%	2%	2%	5%
PPC Leader	1%	2%	3%	2%	3%	1%
Undecided/DK	11%	14%	16%	12%	17%	19%
None	8%	2%	10%	4%	3%	2%

Note: Current data: March 2025

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Best Prime Minister by Age:

Young and middle-aged voters are more pro-Poilievre, while those over the age 55 are more pro-Carney.

	Age		
	18-34	**35-54**	**55+**
	(N=268)	(N=325)	(N=406)
Liberal Leader	27%	30%	40%
Conservative Leader	33%	34%	31%
NDP Leader	14%	9%	5%
Bloc Leader	3%	3%	3%
Green Leader	5%	2%	1%
PPC Leader	3%	2%	1%
Undecided/DK	10%	15%	15%
None	4%	5%	4%

Best Prime Minister

Note: Current data: March 2025

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Best Prime Minister by Gender:

Male voters lean slightly toward Poilievre, while female voters lean the opposite way.

Gender

Best Prime Minister	Men (N=482)	Women (N=514)
Liberal Leader	36%	31%
Conservative Leader	38%	27%
NDP Leader	8%	10%
Bloc Leader	4%	2%
Green Leader	2%	3%
PPC Leader	2%	2%
Undecided/DK	9%	19%
None	2%	6%

Note: Current data: March 2025

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Best Prime Minister by Values Clusters:

Liberals hold their ground while showing influence among Deferential Conservatives.

Values Clusters

	Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
	(N=133)	(N=99)	(N=227)	(N=176)	(N=167)	(N=198)
Liberal Leader	23%	34%	41%	33%	40%	25%
Conservative Leader	60%	33%	30%	29%	13%	34%
NDP Leader	1%	9%	7%	10%	14%	11%
Bloc Leader	1%	4%	6%	1%	5%	2%
Green Leader	0%	1%	3%	2%	4%	3%
PPC Leader	3%	2%	2%	3%	2%	1%
Undecided/DK	9%	13%	9%	17%	17%	17%
None	3%	3%	3%	5%	5%	7%

Best Prime Minister

Note: Current data: March 2025

INNOVATIVE
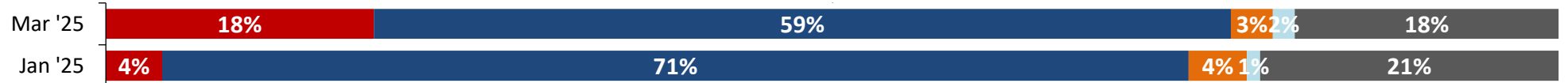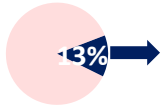RESEARCH GROUP

Best PM by Value Clusters:
Pay-as-you-go-Moderates split support between Carney and Poilievre

Q Which of the following party leaders would make the best Prime Minister of Canada?
[asked of all respondents: Jan '25 W1 W2 n=1,500; Mar '25 W1 W2 W3 W4 n=3,000]

Populist Conservatives
3%

	Leader of the Liberals*	Pierre Poilievre	Jagmeet Singh	Yves-François Blanchet	Other
Mar '25	18%	59%	3%	2%	18%
Jan '25	4%	71%	4%	1%	21%

Deferential Conservatives
10%

Mar '25	36%	29%	8%	6%	20%
Jan '25	11%	42%	7%	9%	30%

Business Liberals
23%

Mar '25	38%	30%	9%	3%	21%
Jan '25	16%	35%	15%	4%	30%

Left Liberals
16%

Mar '25	33%	25%	11%	2%	29%
Jan '25	12%	27%	19%	4%	39%

Core Left
17%

Mar '25	41%	15%	13%	3%	28%
Jan '25	15%	16%	27%	2%	39%

Pay-as-you-go-Moderates
20%

Mar '25	25%	28%	10%	2%	36%
Jan '25	11%	31%	11%	4%	42%
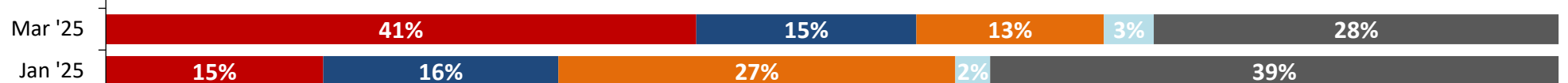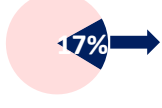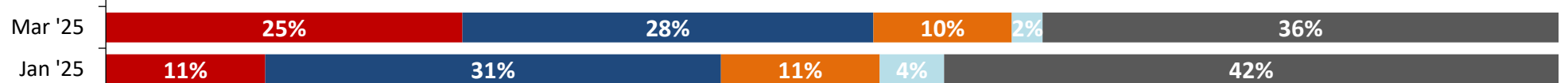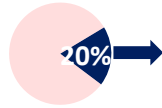
■ Leader of the Liberals* ■ Pierre Poilievre of the Conservatives ■ Jagmeet Singh of the NDP ■ Yves-François Blanchet of the Bloc Quebecois ■ Other

Leader of the Liberals*: Mark Carney for March data AND Justin Trudeau for January data

Best PM by Party ID (January-March):
Support for own leader decreases across all parties except for Liberals following Carney leadership win
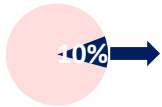
Q Which of the following party leaders would make the best Prime Minister of Canada?
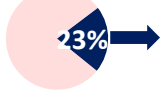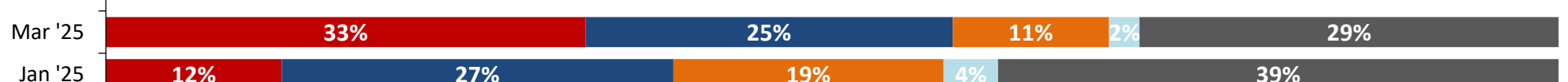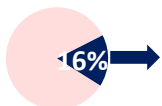[asked of all respondents: Jan '25 W1 W2 n=1,500; Mar '25 W1 W2 W3 W4 n=3,000]

Liberal
- Mar '25: 78% | 7% | 4% | <1% | 11%
- Jan '25: 45% | 7% | 11% | 1% | 35%

CPC
- Mar '25: 7% | 80% | 3% | <1% | 10%
- Jan '25: 2% | 87% | 1% | <1% | 10%

NDP
- Mar '25: 31% | 7% | 48% | <1% | 14%
- Jan '25: 3% | 6% | 69% | <1% | 22%

Green/Other
- Mar '25: 20% | 11% | 5% | 19% | 45%
- Jan '25: 3% | 15% | 9% | 24% | 49%

Unaligned
- Mar '25: 21% | 13% | 4% | 1% | 62%
- Jan '25: 5% | 17% | 7% | 1% | 70%

Legend:
- ■ Leader of the Liberals*
- ■ Pierre Poilievre of the Conservatives
- ■ Jagmeet Singh of the NDP
- ■ Yves-François Blanchet of the Bloc Quebecois
- ■ Other

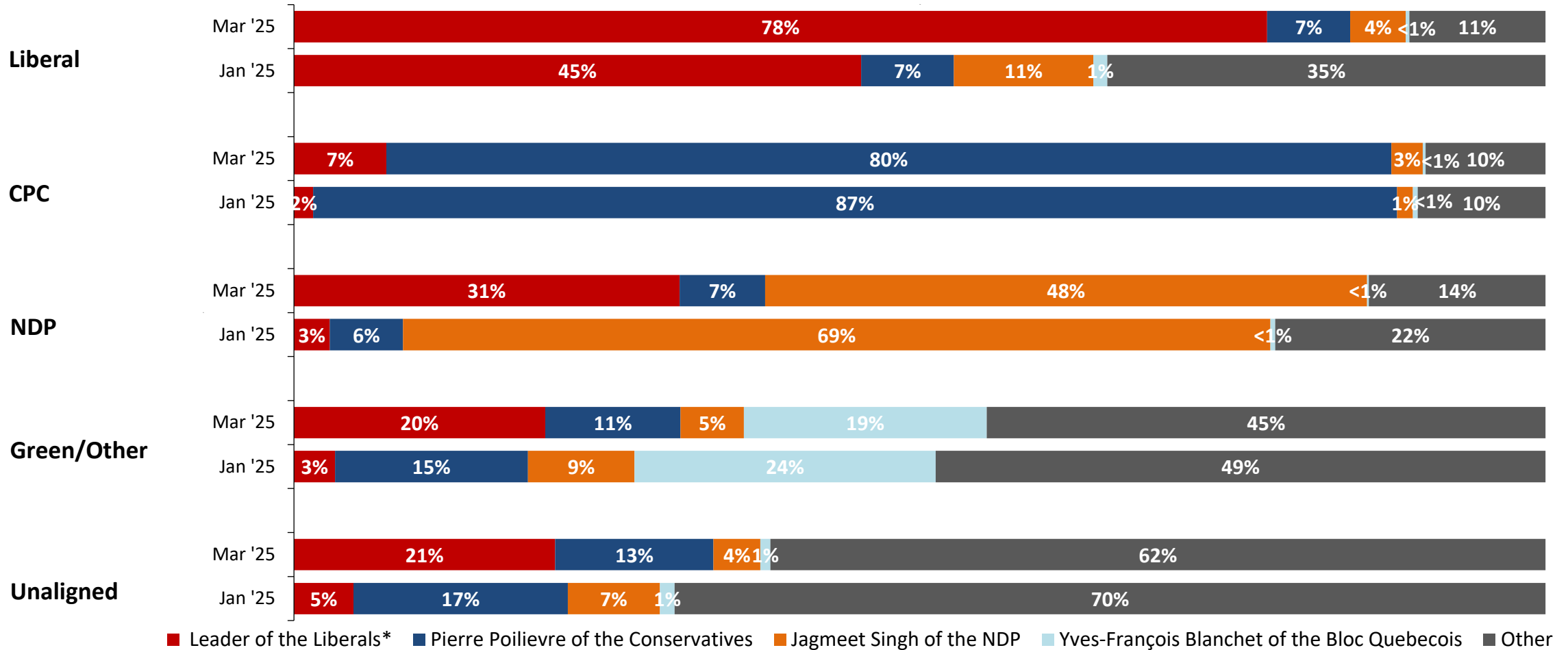Leader of the Liberals*: Mark Carney for March data AND Justin Trudeau for January data

Reaction to Trump

Engagement with U.S.-Canada Relationship:

Attention to U.S-Canadian relations softened marginally from 78% to 76%, but still 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; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000]

	Very closely	Somewhat closely	Not very closely	Not closely at all	Don't know
Mar. '25 W4	33%	43%	17%	6%	2%
Mar. '25 W3	34%	44%	15%	6%	1%
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%

Legend: ■ Very closely ■ Somewhat closely ■ Not very closely ■ Not closely at all ■ Don't know
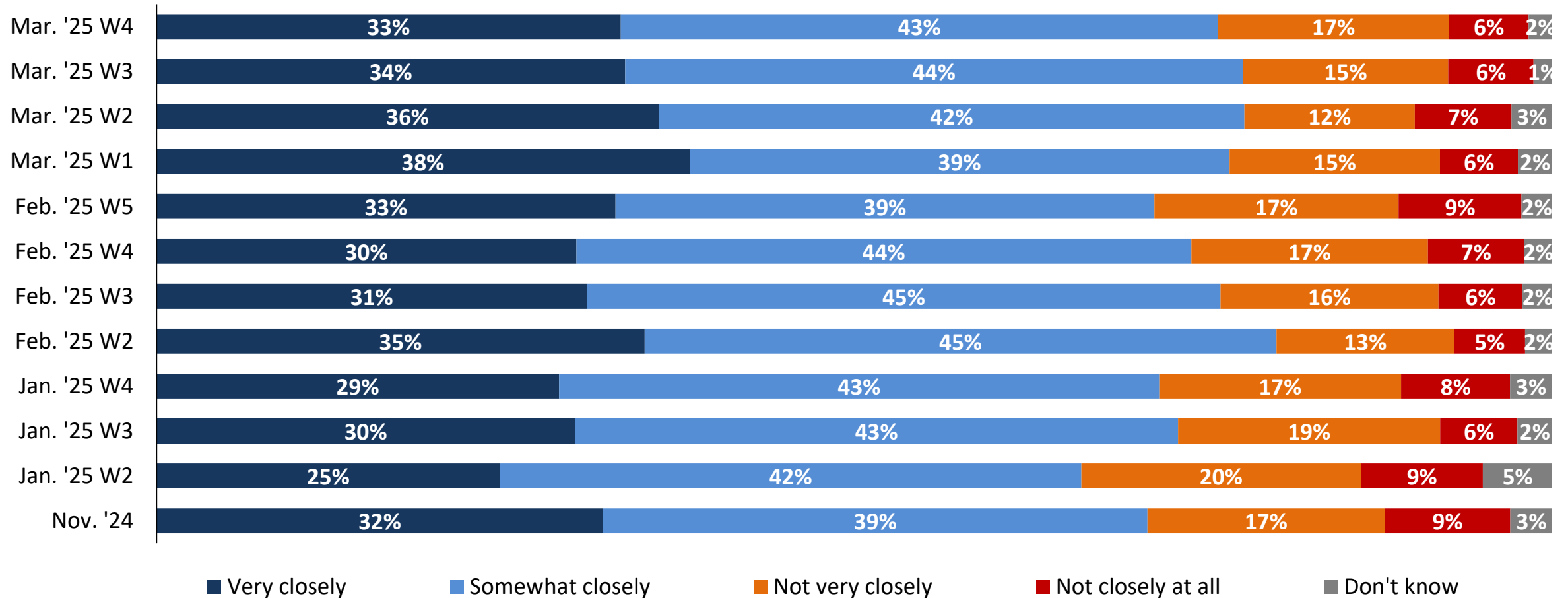
Note: Question wording in Jan.'25 W3 and Nov.'24 was "How closely are you following the news about Donald J. Trump becoming the President of the United States?" Question wording in Jan. '25 W4 was "How closely are you following the news about the relationship between Canada and the U.S. now that Donald J. Trump is becoming the President of the United States?"

Attitude Towards President Trump:
Passion ebbs as those mostly afraid of Trump slip 5-points

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; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000]
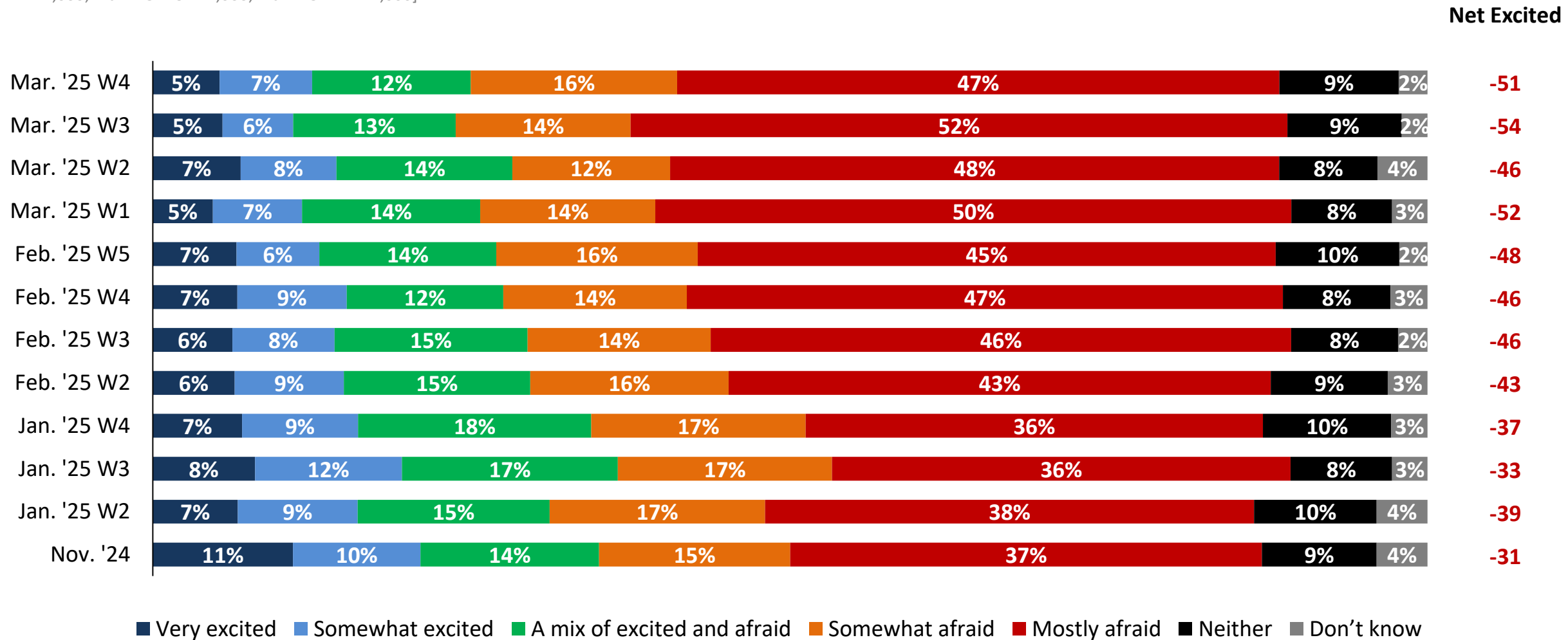
Net Excited

	Very excited	Somewhat excited	A mix of excited and afraid	Somewhat afraid	Mostly afraid	Neither	Don't know	Net Excited
Mar. '25 W4	5%	7%	12%	16%	47%	9%	2%	-51
Mar. '25 W3	5%	6%	13%	14%	52%	9%	2%	-54
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
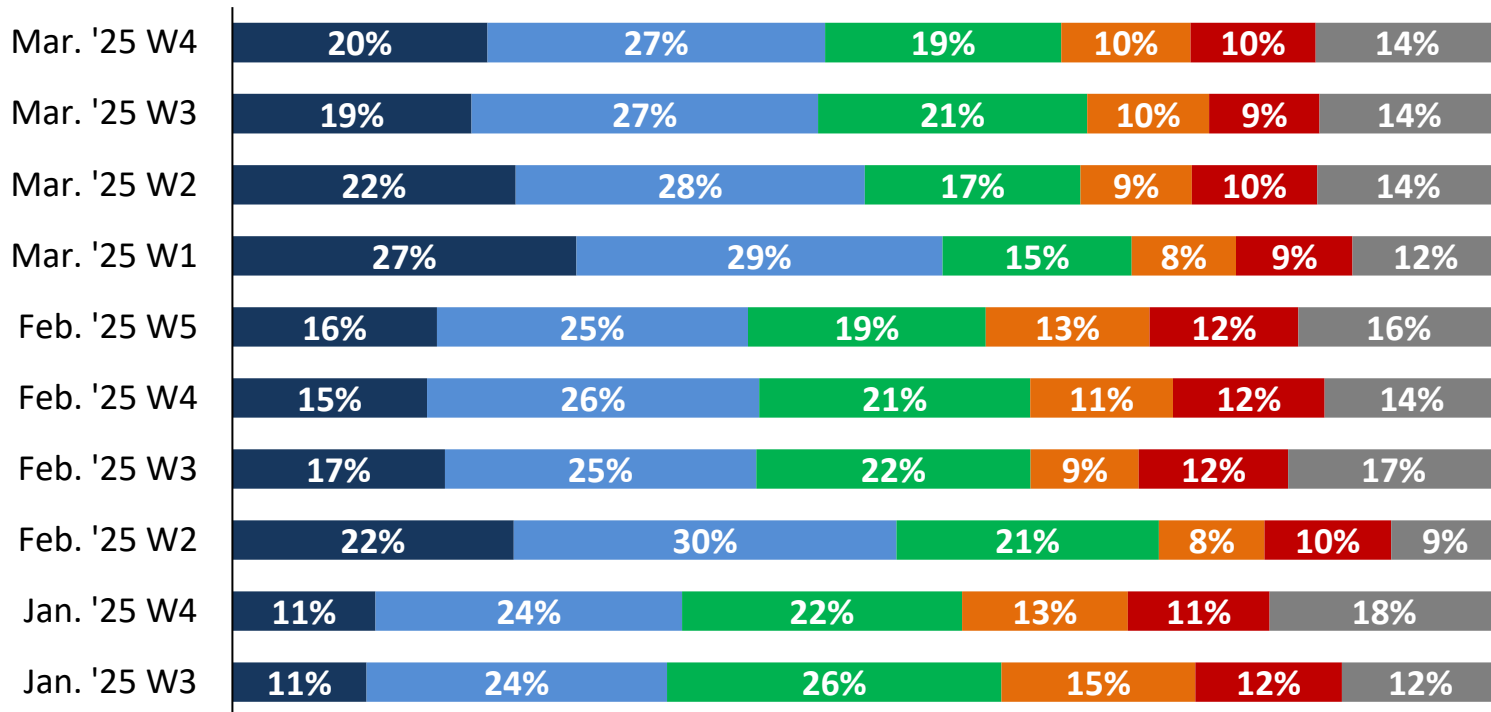
Federal Leadership Approval:

Net approval of the Federal government remains steady since March W3; highest approval among Liberals/NDP

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; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000]

Net Approval

	Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know	Net Approval
Mar. '25 W4	20%	27%	19%	10%	10%	14%	+27%
Mar. '25 W3	19%	27%	21%	10%	9%	14%	+28%
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'

Gender
- Men: 50%
- Women: 44%

Age
- 18-34: 46%
- 35-54: 40%
- 55+: 53%

Region
- BC: 54%
- Alberta: 41%
- Prairies: 47%
- Ontario: 48%
- Quebec: 41%
- Atlantic: 52%

Party ID
- Liberal: 66%
- Conservative: 35%
- NDP: 65%
- Green/Other: 38%
- Unaligned: 34%

Pierre Poilievre and the Conservatives' Approach:
Canadians remain divided on CPC response to Trump with many uncertain

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; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000]
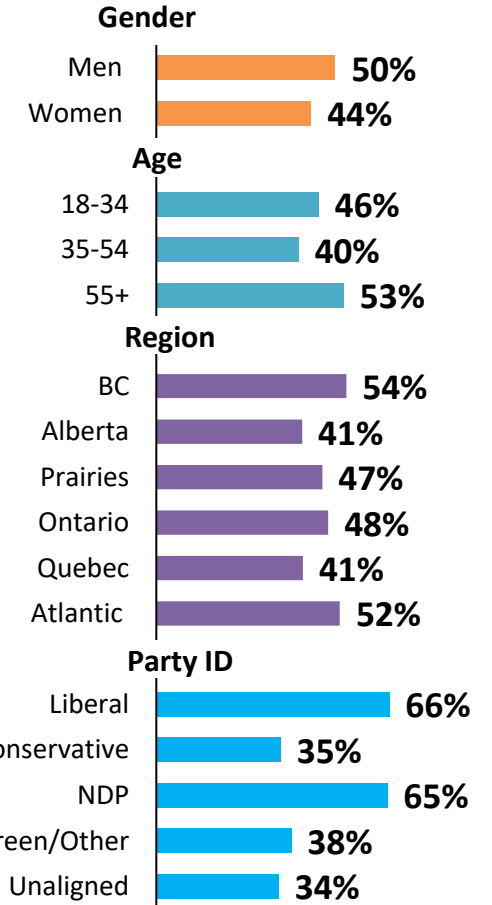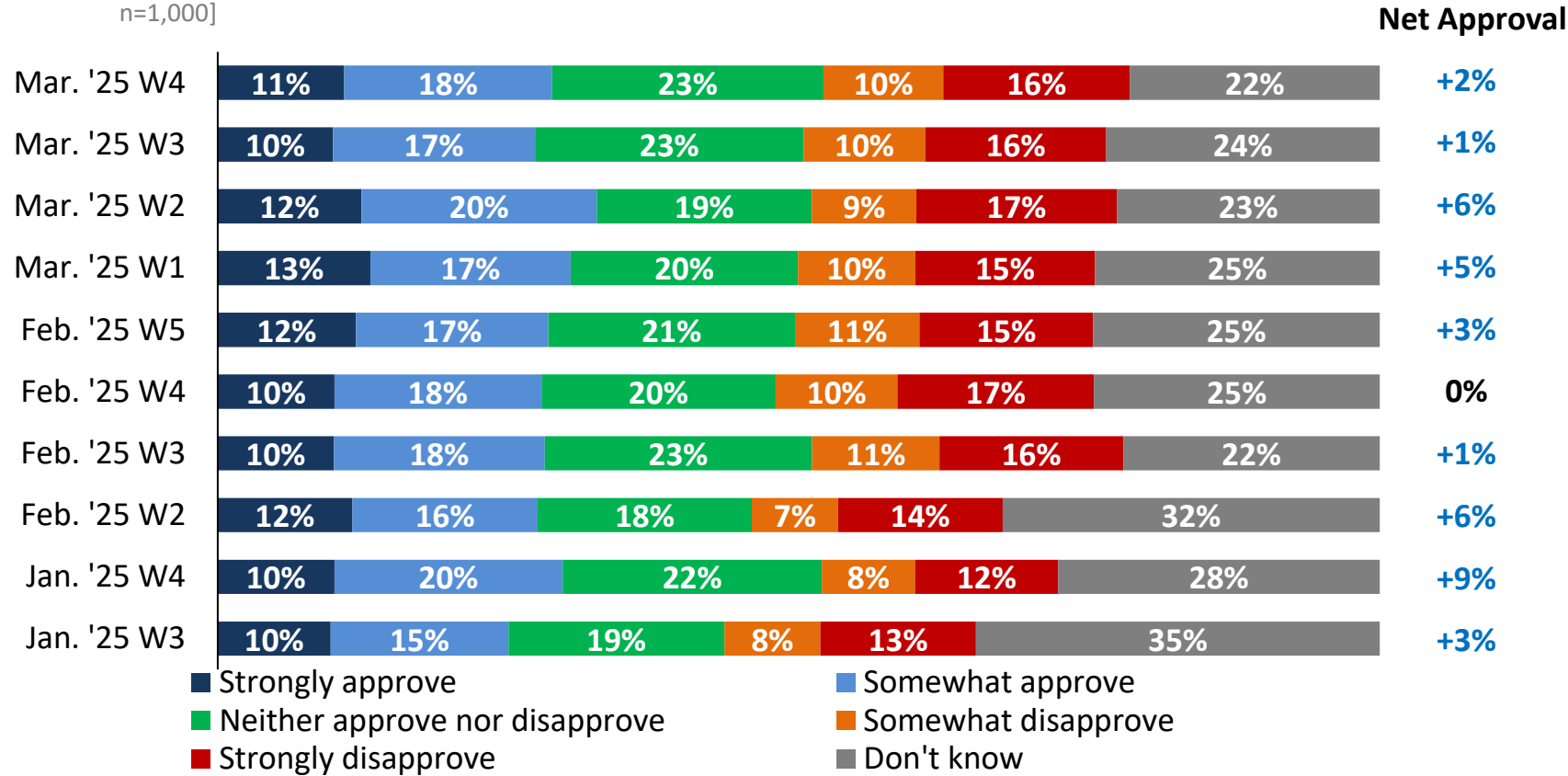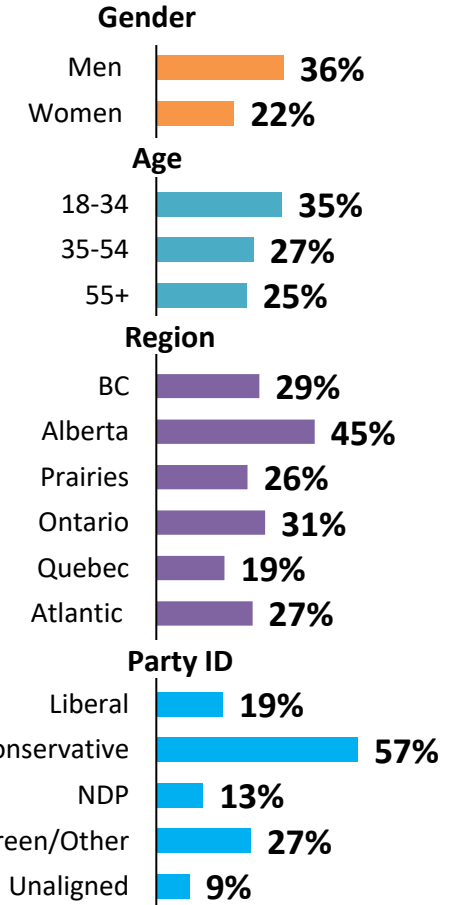
Net Approval

Period	Strongly approve	Somewhat approve	Neither approve nor disapprove	Somewhat disapprove	Strongly disapprove	Don't know	Net Approval
Mar. '25 W4	11%	18%	23%	10%	16%	22%	+2%
Mar. '25 W3	10%	17%	23%	10%	16%	24%	+1%
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%

■ Strongly approve   ■ Somewhat approve
■ Neither approve nor disapprove   ■ Somewhat disapprove
■ Strongly disapprove   ■ Don't know

Segmentation
Those who say 'Approve'

Gender
Men	36%
Women	22%

Age
18-34	35%
35-54	27%
55+	25%

Region
BC	29%
Alberta	45%
Prairies	26%
Ontario	31%
Quebec	19%
Atlantic	27%

Party ID
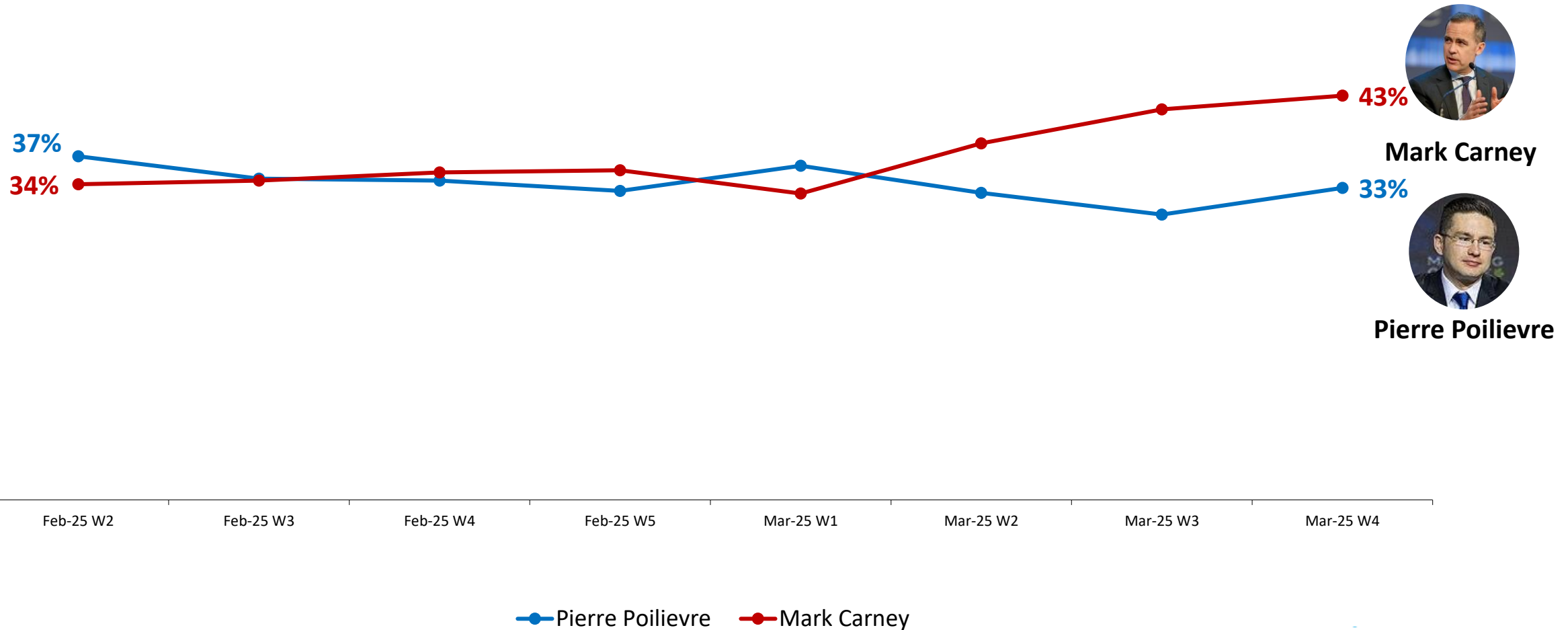|	
Liberal	19%
Conservative	57%
NDP	13%
Green/Other	27%
Unaligned	9%

Best Leader for Canada-US Relations Tracking:
Carney continues to rise as the best leader over the course of March

Q Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency?
[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; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000]

Mark Carney

43%

37%

34%

33%

Pierre Poilievre

| Feb-25 W2 | Feb-25 W3 | Feb-25 W4 | Feb-25 W5 | Mar-25 W1 | Mar-25 W2 | Mar-25 W3 | Mar-25 W4 |

Pierre Poilievre ——— Mark Carney

Best Leader for Canada-US Relations:

Carney's lead among the afraid remains at peak while Poilievre remains strong among the excited and mixed

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; Mar. '25 W3 n=1,000; '25 W4 n=1,000]
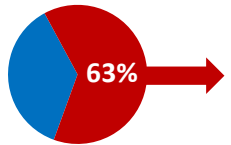
Attitudes Towards Trump

Mark Carney

Pierre Poilievre

Excited

Wave	Mark Carney	Neither	Don't know	Pierre Poilievre
Mar. '25 W4	32%	6%	4%	58%
Mar. '25 W3	21%	13%	8%	57%
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

Wave	Mark Carney	Neither	Don't know	Pierre Poilievre
Mar. '25 W4	28%	8%	7%	56%
Mar. '25 W3	30%	10%	11%	49%
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

63%

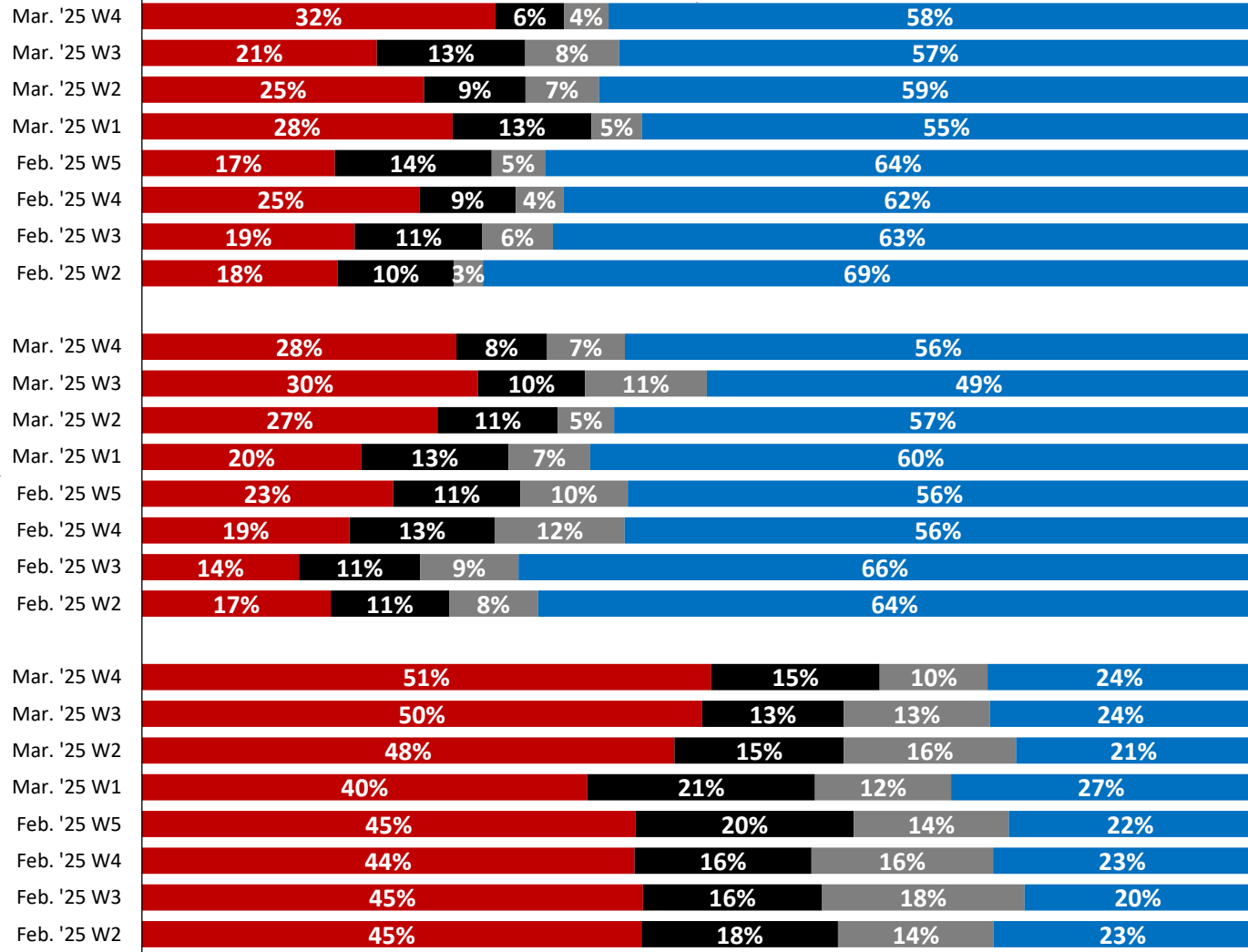| Wave	Mark Carney	Neither	Don't know	Pierre Poilievre
Mar. '25 W4	51%	15%	10%	24%
Mar. '25 W3	50%	13%	13%	24%
Mar. '25 W2	48%	15%	16%	21%
Mar. '25 W1	40%	21%	12%	27%
Feb. '25 W5	45%	20%	14%	22%
Feb. '25 W4	44%	16%	16%	23%
Feb. '25 W3	45%	16%	18%	20%
Feb. '25 W2	45%	18%	14%	23%

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

Survey Methodology

These are the results of an online survey conducted between March 26th and March 31st, 2025.

Method: This online survey was conducted and sponsored by Innovative Research Group Inc. 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=1,742 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 26th and March 31st, 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	759	10.8%	133	13.4%
Men 35-54	1,149	16.3%	158	15.9%
Men 55+	1,521	21.6%	190	19.1%
Women 18-34	824	11.7%	131	13.2%
Women 35-54	1,201	17%	167	16.7%
Women 55+	1,602	22.7%	216	21.7%
British Columbia	900	12.7%	139	13.9%
Alberta	890	12.6%	111	11.1%
Prairies	846	11.9%	64	6.4%
Ontario	2,394	33.8%	387	38.7%
Québec	1,174	16.6%	231	23.1%
Atlantic	880	12.4%	67	6.7%

Methodology

The report also details tracking data for four waves for the month of March among 6543 Canadian citizens, 18 years of age and older, from March 05, 2025 to March 31, 2025.

The monthly sample has also been weighted (n=4,000) by age, gender, region, education, and self-reported federal past vote using the latest available Census data to reflect the actual demographic composition of the population.

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

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Building Understanding.

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