**Canada This Month**

**Digital Service Tax**

**Public Opinion Research**
**Release Date: August 29th, 2025**
**Field Dates: July 04 and July 28, 2025**

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# Study Overview

Building on findings from previous waves, this report tracks July data about:

- **Reactions to Trump**
- **Response to USA**
- **Digital Service Tax**

# Key Findings

**1** **The federal government's approval of handling Trump related issues further drops** 5 points in July to 39%, with a 11-point drop in net approval since the previous month. Among 23% who disapprove, the common perception is that Carney and the federal government are weak or inexperienced (19%) and should take a stronger stance, or that they are not doing enough (19%).

**2** **PM's net favourability (now at 12%) also further drops and is 19 points lower than in June.** Even though the interest in the Canada-U.S. relationship remains high, with three in four Canadians closely following, the number of Canadians who have read, seen, or heard (RSH) something about PM further drops to the lowest since he was elected (42%). The strongest cited driver of low favourability is caving to Trump on the digital tax (7% mentioned it).

**3** **48% of Canadians think that taxing US tech giants is a good idea,** 21% are undecided, and 32% think it is a bad idea. Carney's decision to suspend it divided opinions; 26% say he was wrong to suspend it, while 30% say he was right. Views on the suspension also split partisan lines, with 40% of Liberals, 30% of Conservatives, and 23% of NDP supporters in agreement.

**4** **The net effect of dealing with digital tax on PM's favourability is a negative score,** such that 27% now view Carney less favourably and 24% more favourably based on events around digital tax. The drop in favourability is most notable among older cohorts, in Alberta, and across all political affiliations except Liberal.

**5** **One-third of Canadians identify as "Strugglers" in the economic gap segmentation**, outnumbering "Achievers" and "Alienated" (both at 23%). With 62% agreeing it's harder to get by each year, for Canadians who remain highly engaged in the news cycle and frequently recall Trump, tariffs, and trade, the economic anxiety could magnify the perceived political indecisiveness as damaging to the PM.

# Key Voter Segments

# Economic Gap Segmentation Attitudes: Over half (56%) say you can be anything you want; 62% say its more difficult to get by every year

**Q** Do you agree or disagree with the following statements? -
[asked of all respondents; n=2,000]

**Here in [PROV] you can be anything you want if you are willing to work for it**
- Strongly agree: 21%
- Somewhat agree: 35%
- Neither agree nor disagree: 19%
- Somewhat disagree: 13%
- Strongly disagree: 10%
- Don't know: 2%
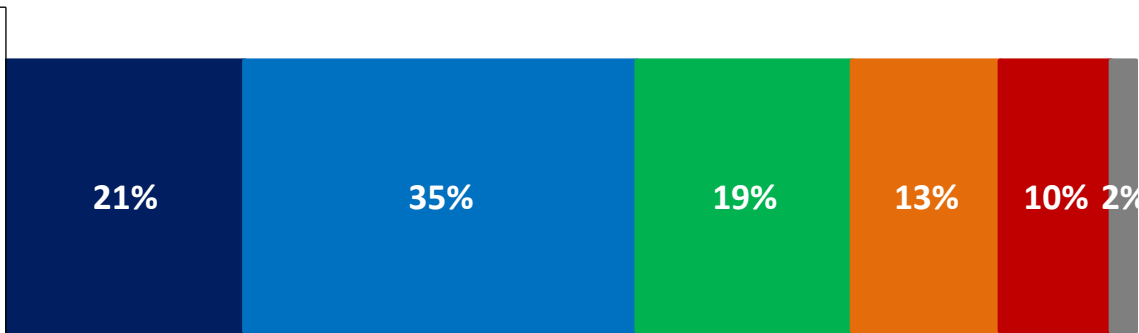
**No matter how hard I work, every year it seems more difficult to get by**
- Strongly agree: 32%
- Somewhat agree: 30%
- Neither agree nor disagree: 21%
- Somewhat disagree: 9%
- Strongly disagree: 6%
- Don't know: 2%

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

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Current data: July 2025

# Economic Gap Segmentation: 1-in-3 are strugglers, followed by Achievers and Alienated at 23%

**Q** Gap segmentation: Agree with 'Here in [PROVINCE] you can be anything you want if you are willing to work for it' BY Agree with 'No matter how hard I work, every year it seems more difficult to get by'.
[asked of all respondents; n=2,000]



| Achievers | Strugglers | Ambivalent | Alienated |
|-----------|-----------|-----------|-----------|
| 23% | 33% | 21% | 23% |

Current data: July 2025

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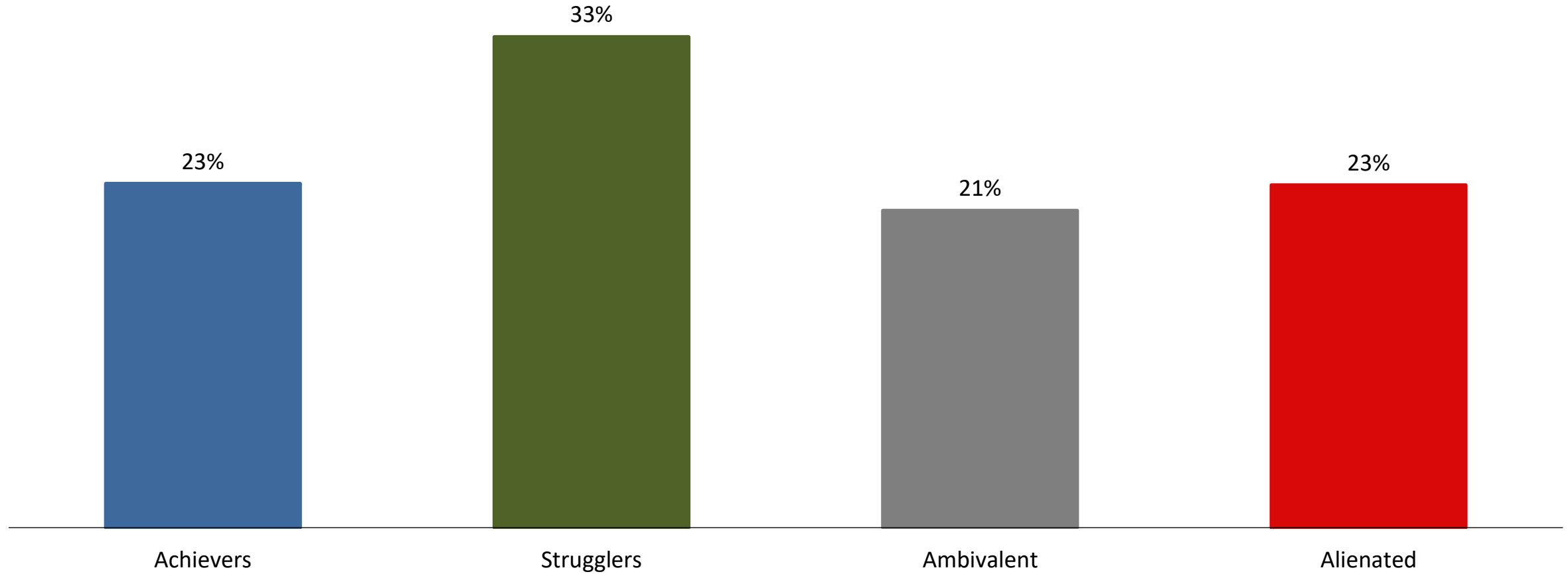
# Federal Party ID (Quebec vs. ROC): The Conservatives hold a 7-point lead in the ROC, while the Liberals are ahead of Bloc by 7 points in QC

## Party ID: Quebec

[Respondents in Quebec; n=460]

- Conservative: 15%
- Liberal: 32%
- NDP: 4%
- Bloc: 25%
- Other: 6%
- Unaligned: 19%
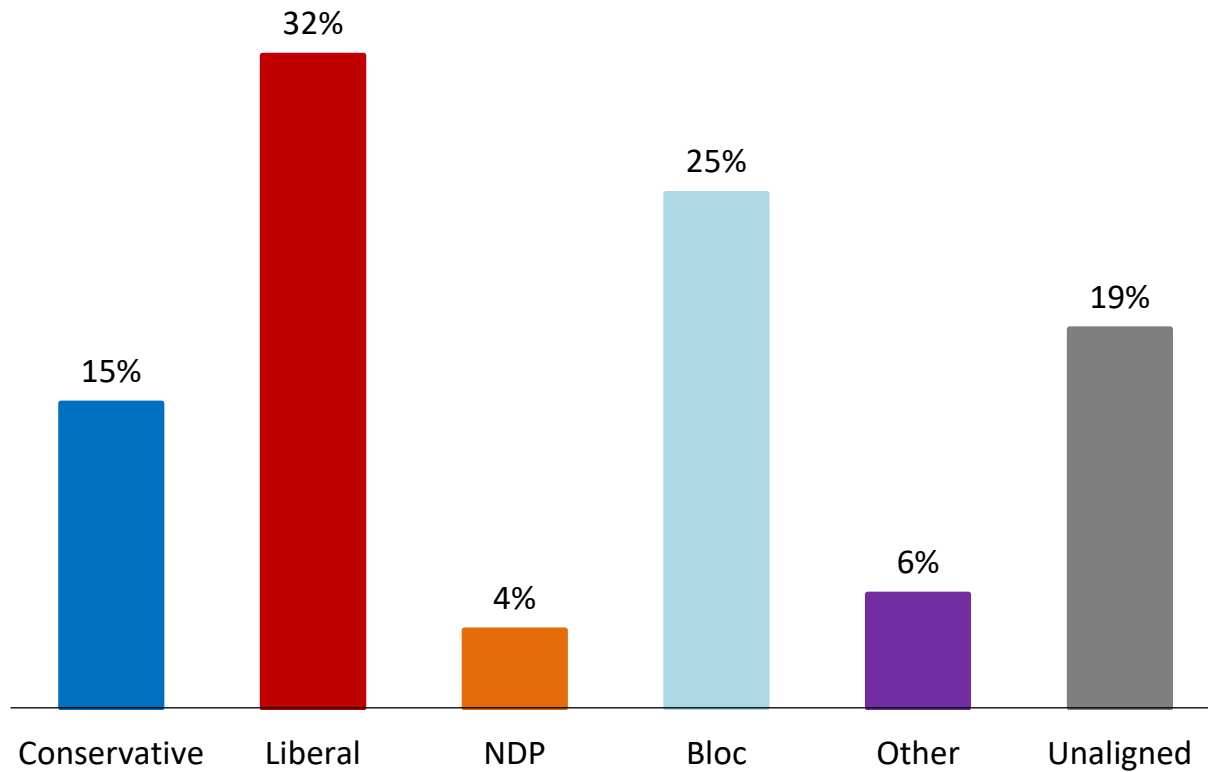
## Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1,540]

- Conservative: 36%
- Liberal: 29%
- NDP: 10%
- Other: 6%
- Unaligned: 19%

Current data: July 2025

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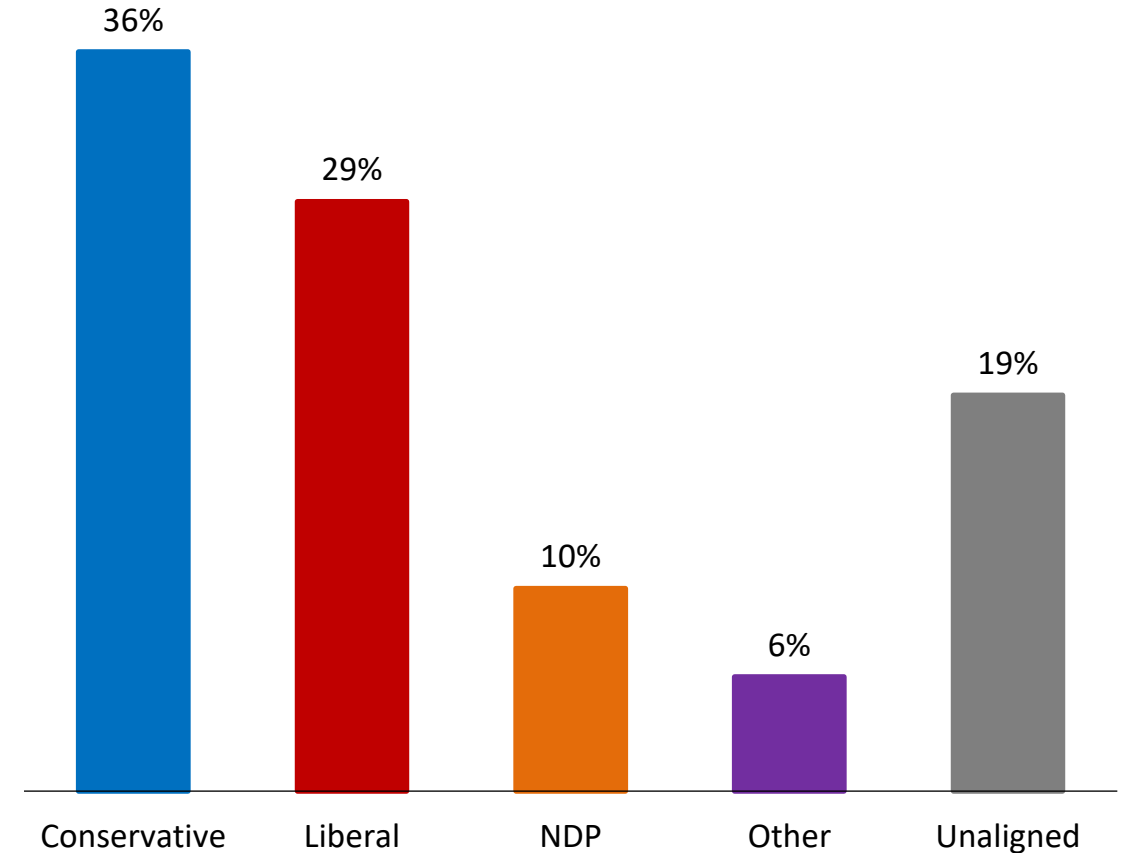
# Tracking Party Identification (Quebec): Liberals have dropped 5 points from the previous month but still maintain the lead at 32%

**Q** Thinking about politics in Canada, generally speaking, do you usually think of yourself as a…
[asked of those in Quebec; n=460]
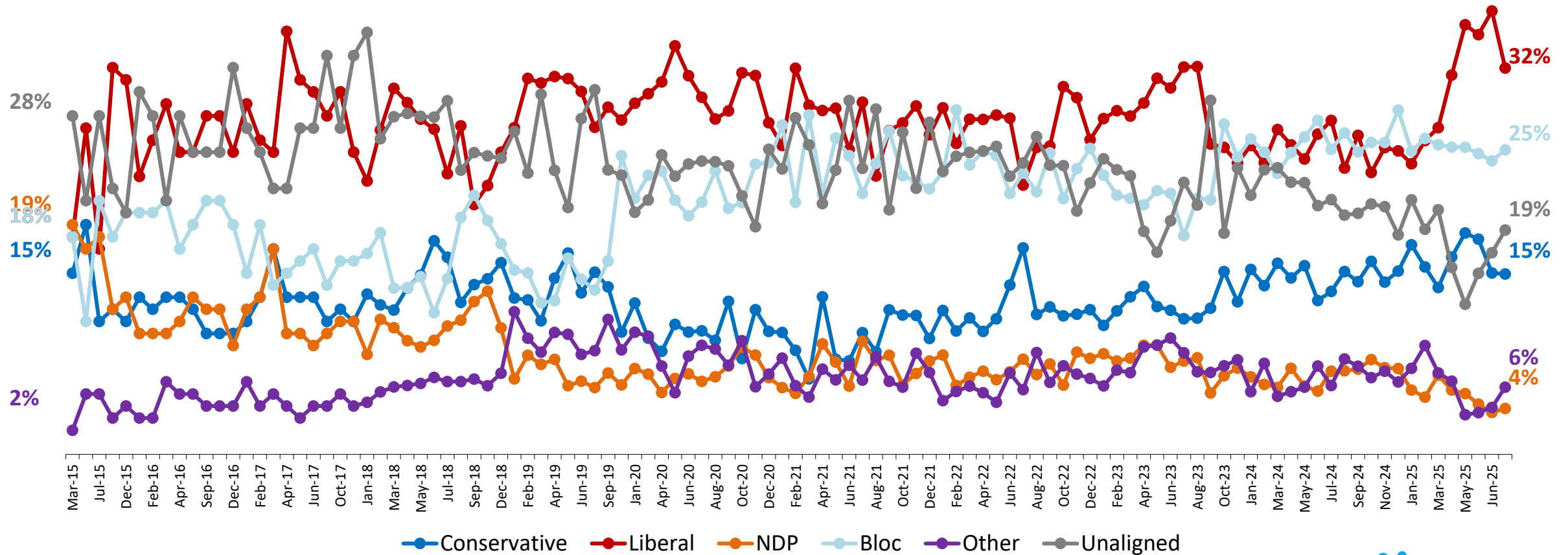


Current data: July 2025

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

# Tracking Party Identification (Rest of Canada): Liberals and Conservatives remain relatively steady since end of May

**Q** Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[asked of those outside Quebec; n=768]



Legend: Conservative, Liberal, NDP, Other, Unaligned

Current data: July 2025

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# Value Clusters: Business Liberals (23%) are the highest value cluster, followed by Pay-as-you-go at 19%

**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=2,000]



Populist Conservatives
13%

Deferential Conservatives
10%

Business Liberals
23%

Left Liberals
16%

Core Left
17%

Pay-as-you-go Moderates
19%

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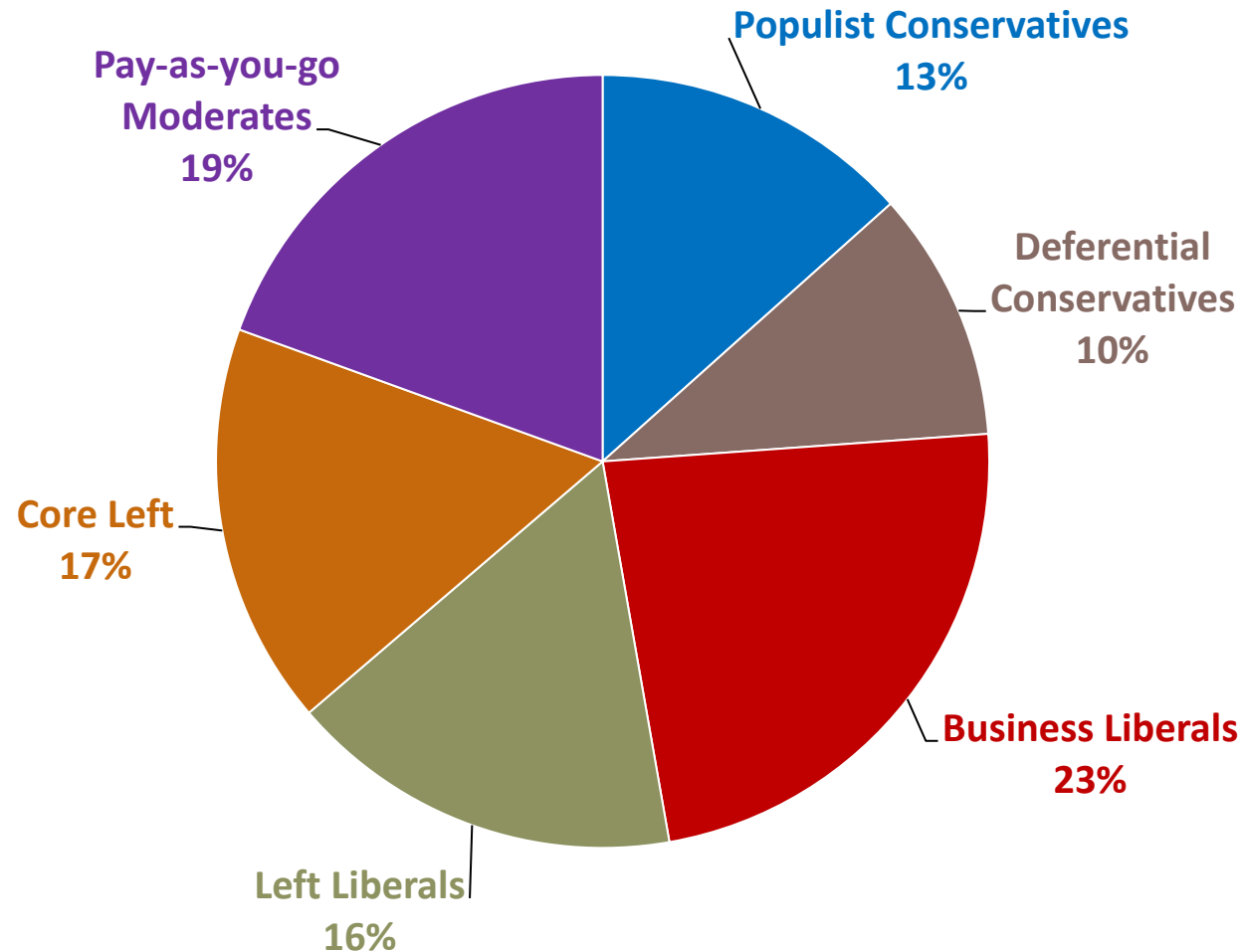
# Core Political Values: Nearly 2-in-3 believe the main role of the government is to create equal opportunity

**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=2,000]

- Their ability to afford the programs and services — 37%
- The public's need for the programs and services — 53%
- Don't know — 10%

**Q** Is the main role of government to…?
[asked of all respondents; n= 2,000]

- To create equal opportunity so that everyone can compete on their own to be the best they can be — 61%
- To redistribute wealth so that the poor and disadvantaged have more than they would if left on their own — 30%
- Don't know — 9%

**Q** Which of the following statements comes closest to your view?
[asked of all respondents; n= 2,000]

- The profit system brings out the worst in human nature — 41%
- The profit system teaches people the value of hard work and success — 45%
- Don't know — 14%

**Q** When it comes to government decision making, which of the following statements is closest to your view?
[asked of all respondents; n= 2,000]

- Too often the government listens to experts instead of common sense — 51%
- Provincial issues are complicated so government should listen to experts when it comes to policy — 36%
- Don't know — 13%

Current data: June 2025

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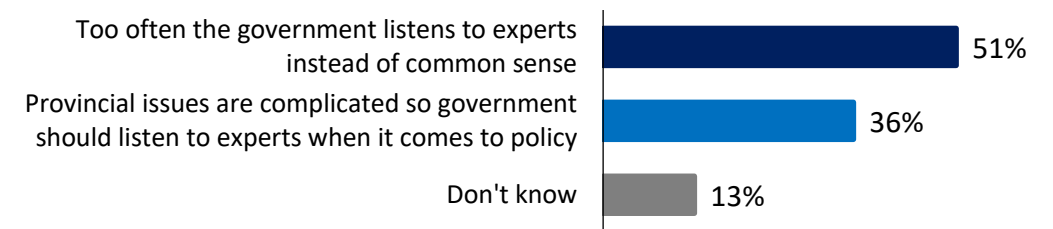
# Defining Value Clusters: Populists, Deferential, and Pay-as-you-go supports government decision making based on ability to afford

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 | 92% | 91% | 0% | 0% | 0% | 78% |
| | Public Need | 0% | 0% | 97% | 90% | 95% | 0% |
| **Is the main role of government to...?** | Create equal opportunity | 99% | 77% | 68% | 98% | 0% | 39% |
| | Redistribute wealth | 0% | 18% | 24% | 0% | 97% | 34% |
| **When it comes to government decision making...** | Rely on common sense | 100% | 0% | 45% | 58% | 43% | 53% |
| | Listen to experts | 0% | 89% | 47% | 27% | 44% | 20% |
| **The profit system...** | Brings out the worst in human nature | 0% | 0% | 0% | 85% | 88% | 63% |
| | Teaches value of hard work and success | 89% | 92% | 91% | 0% | 0% | 11% |

**Note:** Current data: July 2025

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# Reaction to Trump

# Engagement with U.S.-Canada Relationship: Attention to U.S.-Canadian relations remains stable from April 2025

**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; n=2,000]



Legend: Very closely · Somewhat closely · Not very closely · Not closely at all · Don't know

Left-axis values: 3% / 9% / 17% / 39% / 32%

Right-axis values: 2% / 8% / 16% / 43% / 31%

X-axis: Nov-24, Jan-25, Jan-25 (2), Jan-25 (3), Feb-25, Feb-25 (2), Feb-25 (3), Feb-25 (4), Mar-25, Mar-25 (2), Apr-25, Apr-25 (2), Apr-25 (3), May-25, Jun-25, Jul-25
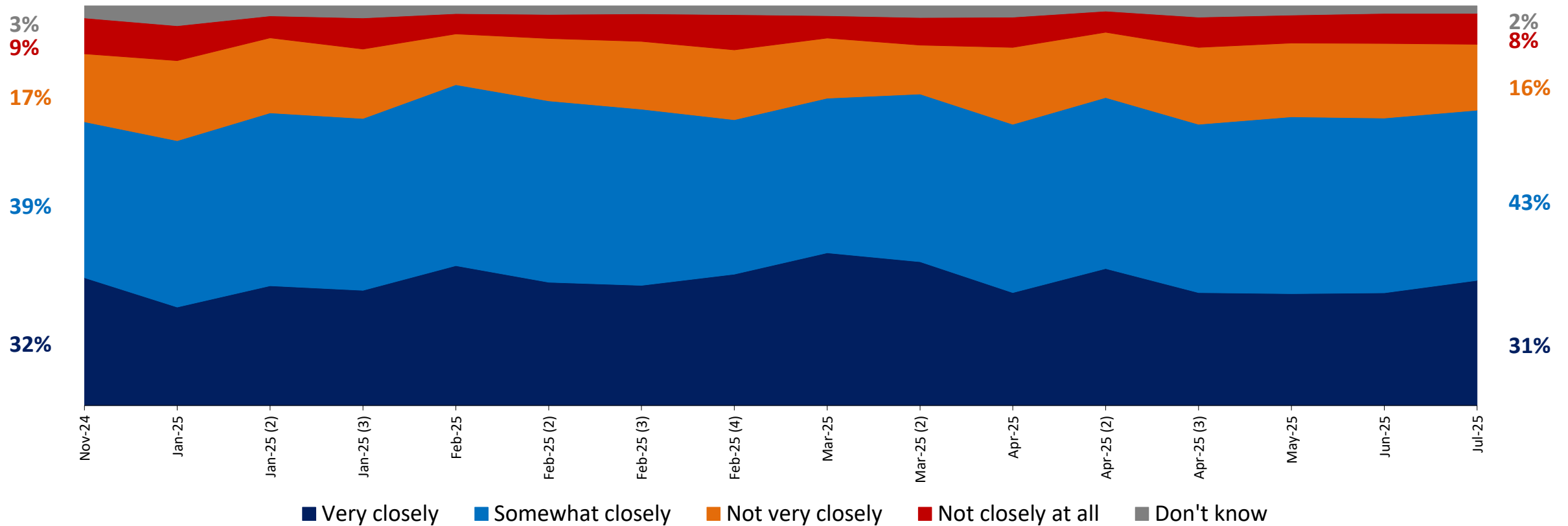
Current data: July 2025
Note: Question wording in Jan.'25 W3 and Nov.'24 was "How closely are you following the news about Donald J. Trump becoming the President of the United States?" Question wording in Jan. '25 W4 was "How closely are you following the news about the relationship between Canada and the U.S. now that Donald J. Trump is becoming the President of the United States?"

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# Attitude Towards President Trump: Excitement towards Donald Trump remains relatively steady since April and low, now at 12%

**Q** Does Donald J. Trump's election as the US President leave you feeling excited or afraid?
[asked of all respondents; n=2,000]



Legend: Very excited | Somewhat excited | A mix of excited and afraid | Somewhat afraid | Mostly afraid | Neither | Don't know

Left axis values (Nov-24): 4%, 9%, 37%, 15%, 14%, 10%, 11%

Right axis values (Jul-25): 2%, 12%, 48%, 13%, 12%, 6%, 6%

Current data: July 2025

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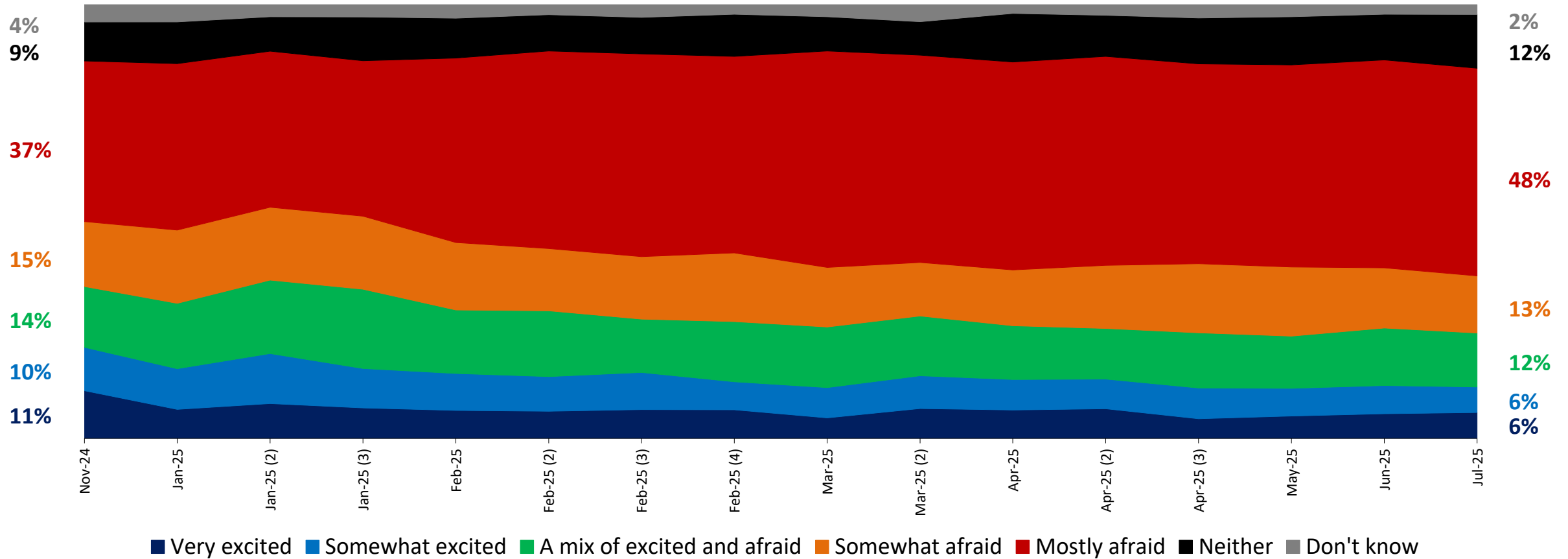
# Federal Government's Approval: Approval further drops 5% since the end of June, now at 39% with 23% unsure

**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; n=2,000]



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

Current data: July 2025

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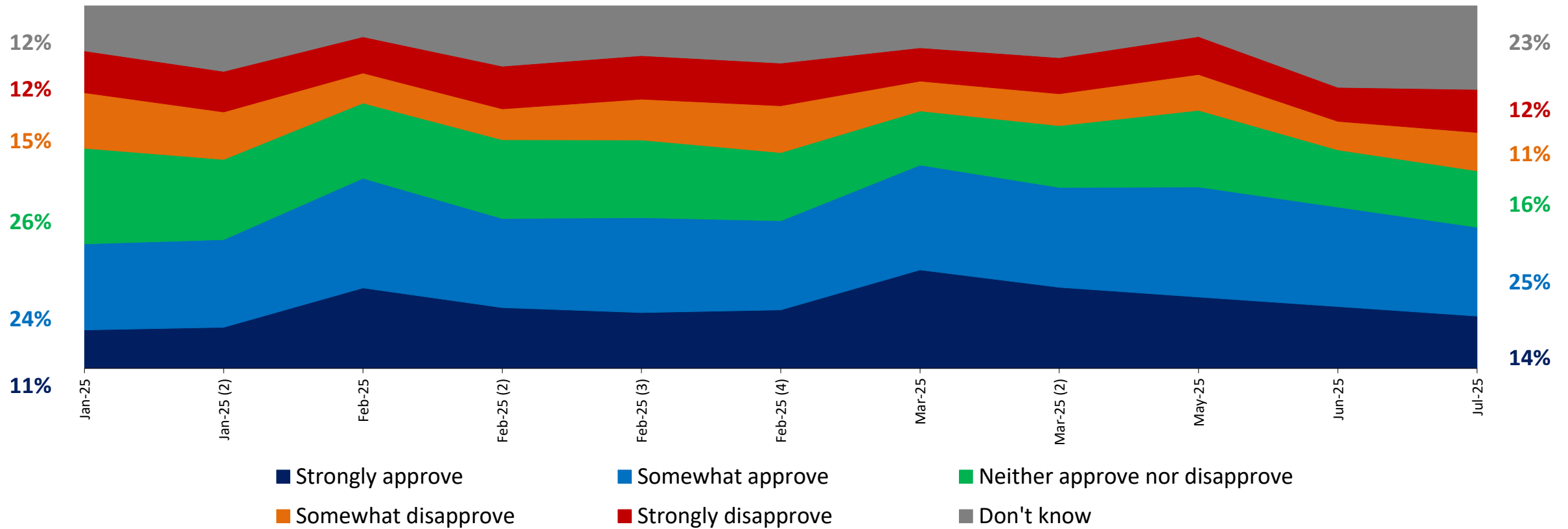
# Provincial Government Approval: BC and ON have the highest net approval scores, statistically unchanged since June

**Q** Do you approve or disapprove of the way the [PROV] government is responding to issues resulting from Donald Trump's Presidency?
[asked of all respondents; Jul. '25 BC n=280, ON n=772; Jun. '25: BC n=213, ON n=579; May '25: BC. n=421, ON n=1,158; Apr. '25: BC. n=588, ON n=1,624; Mar. '25: BC n=560, ON n=1,546; Feb. '25: BC n=559, ON n=1,544; Jan. '25: BC n=187, ON n=655]

**Net Approval**

**British Columbia**

| | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 17% | 27% | 17% | 9% | 8% | 22% | +26 |
| Jun. '25 | 16% | 29% | 14% | 10% | 10% | 21% | +26 |
| May '25 | 20% | 31% | 24% | 9% | 8% | 8% | +33 |
| Apr. '25 | 21% | 28% | 23% | 8% | 6% | 14% | +36 |
| Mar. '25 | 25% | 30% | 19% | 9% | 5% | 12% | +39 |
| Feb. '25 | 20% | 26% | 22% | 8% | 7% | 17% | +30 |
| Jan. '25 | 14% | 26% | 27% | 11% | 2% | 20% | +26 |

**Ontario**

| | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 13% | 30% | 18% | 10% | 9% | 20% | +24 |
| Jun. '25 | 16% | 29% | 18% | 8% | 10% | 18% | +27 |
| May '25 | 17% | 35% | 22% | 10% | 7% | 9% | +35 |
| Apr. '25 | 22% | 33% | 20% | 7% | 7% | 10% | +41 |
| Mar. '25 | 28% | 31% | 16% | 8% | 7% | 10% | +44 |
| Feb. '25 | 19% | 29% | 21% | 10% | 8% | 13% | +31 |
| Jan. '25 | 14% | 30% | 23% | 10% | 9% | 14% | +25 |

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

# BC Government Response to Trump's Presidency - Approve:
## Out of those who say approve, 34% think the provincial government is handling Trump well

**Q** Do you approve or disapprove of the way BC's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
[Asked BC Respondents; Those who said approve; n=172]

| Response | % |
|---|---|
| Premier/provincial government is handling Trump well | 34% |
| Fight back/responding well on tariffs | 13% |
| Trump is a bully/need to stand up to Trump | 12% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 10% |
| Should take a stronger stance/not doing enough | 5% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 5% |
| We should avoid tough stances/work on building US relationship | 3% |
| Positive comment - general | 3% |
| Lack of meaningful response/ talk a lot but do a little/ need to do better/ do more/nothing is being resolved | 3% |
| Canada and its leader(s) is/should be united in standing up against Trump | 2% |
| Need more information/too early to decide/neutral | 2% |
| Should be the federal gov't's responsibility | 1% |
| The retaliation will hurt us-general | 1% |
| Other | 2% |
| None | 3% |

**Note**: 'Other' includes responses <1%.

# BC Government Response to Trump's Presidency - Disapprove:

## Out of those who say disapprove, 18% need more information to decide and 12% think Eby should do better

**Q** Do you approve or disapprove of the way BC's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
[Asked BC Respondents; Those who said disapprove; n=98]

| Response | % |
|---|---|
| Need more information/too early to decide/neutral | 18% |
| Lack of meaningful response/ talk a lot but do a little/ need to do better | 12% |
| Should take a stronger stance/not doing enough | 8% |
| Disagree on Premier/provincial government's handling of issue | 8% |
| Premier/provincial government is handling Trump well | 7% |
| We should avoid tough stances/work on building US relationship | 6% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 6% |
| Trump is a bully/need to stand up to Trump | 4% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 4% |
| Distrust in our premier | 3% |
| Canada and its leader(s) is/should be united in standing up against Trump | 3% |
| Fight back/responding well on tariffs | 2% |
| Should be the federal gov't's responsibility | 1% |
| Appeasing/pandering to Trump/supportive of Trump | 1% |
| Positive comment - general | 1% |
| Won't make a difference/feel powerless | 1% |
| The retaliation will hurt us-general | 1% |
| Government should avoid a trade war | 1% |
| Other | 7% |
| None | 3% |
| Don't Know | 4% |

**Note**: 'Other' includes responses <1%, 'Refused/No comment' (1%) not shown

# ON Government Response to Trump's Presidency - Approve:

## Out of those who say approve, 35% think the provincial government is handling Trump well

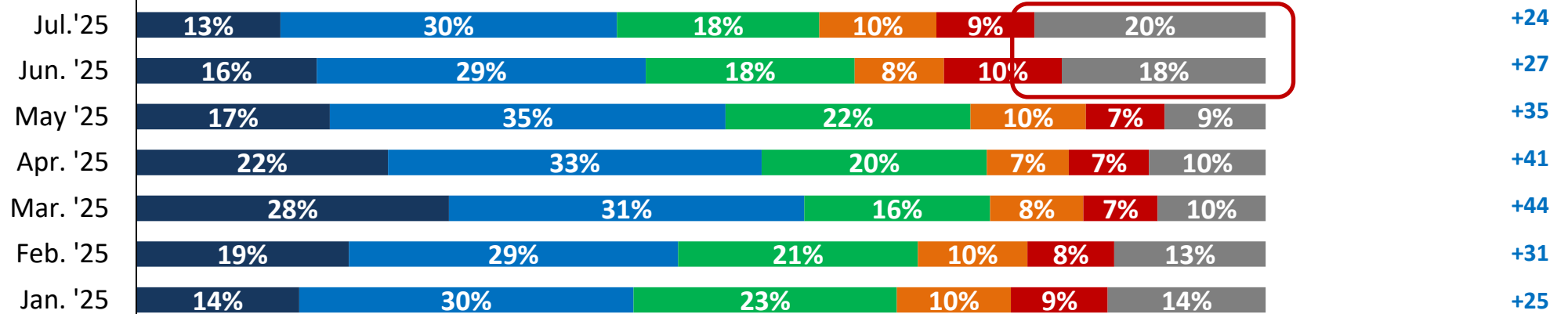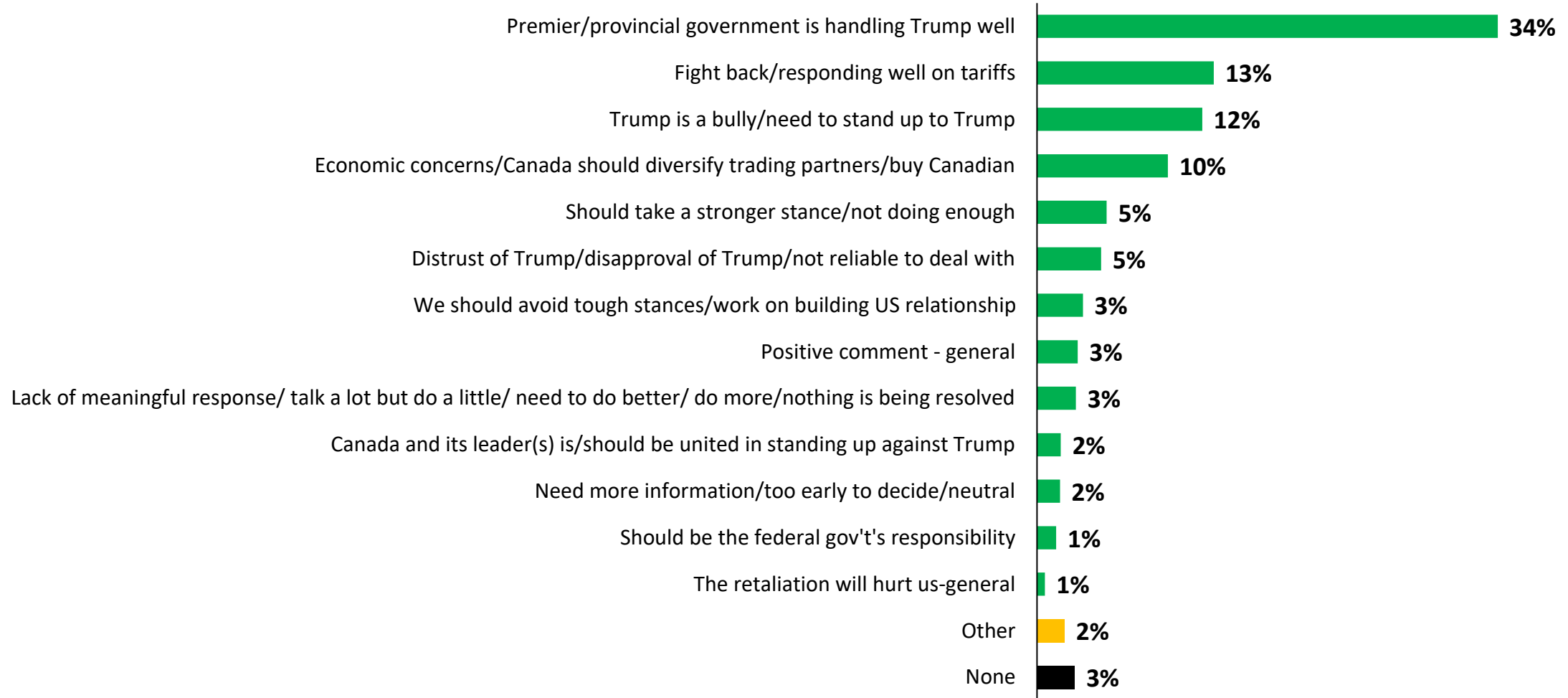**Q** Do you approve or disapprove of the way Ontario's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
[Asked Ontario Respondents; Those who said approve; n=411]

| Response | % |
|---|---|
| Premier/provincial government is handling Trump well | 35% |
| Fight back/responding well on tariffs | 22% |
| Trump is a bully/need to stand up to Trump | 13% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 5% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 4% |
| Lack of meaningful response/ talk a lot but do a little/ need to do better | 3% |
| Should take a stronger stance/not doing enough | 3% |
| Positive comment - general | 2% |
| We should avoid tough stances/work on building US relationship | 2% |
| Need more information/too early to decide/neutral | 1% |
| Canada and its leader(s) is/should be united in standing up against Trump | 1% |
| The retaliation will hurt us-general | 1% |
| Appeasing/pandering to Trump/supportive of Trump | 1% |
| Distrust in our premier | 1% |
| Other | 5% |
| None | 1% |
| Don't know | <1% |

**Note**: 'Other' includes responses <1%.

# ON Government Response to Trump's Presidency - Disapprove:

## Out of those who say disapprove, 16% think the government/Premier should do better

**Q** Do you approve or disapprove of the way Ontario's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
[Asked Ontario Respondents; Those who said disapprove; n=273]

| Response | % |
|---|---|
| Need more information/too early to decide/neutral | 19% |
| Lack of meaningful response/ talk a lot but do a little/ need to do better | 16% |
| Should take a stronger stance/not doing enough | 10% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 9% |
| Disagree on Premier/provincial government's handling of issue | 8% |
| We should avoid tough stances/work on building US relationship | 5% |
| Distrust in our premier | 4% |
| Premier/provincial government is handling Trump well | 2% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 2% |
| Trump is a bully/need to stand up to Trump | 2% |
| The retaliation will hurt us-general | 1% |
| Canada and its leader(s) is/should be united in standing up against Trump | 1% |
| Won't make a difference/feel powerless | 1% |
| Need to have a plan/be ready | 1% |
| Appeasing/pandering to Trump/supportive of Trump | 1% |
| Should be the federal gov't's responsibility | 1% |
| Negative comment - general | 1% |
| Fight back/responding well on tariffs | 1% |
| Retaliation is not the right response but that seems to be the only choice | 1% |
| Positive comment - general | 1% |
| Other | 5% |
| None | 4% |
| Don't Know | 3% |

**Note**: 'Other' includes responses <1%, 'Refused/No comment' (1%) not shown

# Provincial Government Approval: AB and the Prairies have the lowest net approval of their governments' approach to Trump-related issues

**Q** Do you approve or disapprove of the way the [PROV] government is responding to issues resulting from Donald Trump's Presidency?
[asked of all respondents; Jul. '25 AB n=224, Prairies n=130; Jun. '25 AB n=166, Prairies n=96; May '25 AB n=333, Prairies n=196; Apr. '25 AB n=466, Prairies n=271; Mar. '25 AB n=448, Prairies n=257; Feb. '25 AB n=448, Prairies n=259; Jan. '25, AB n=159, Prairies n=93]

**Net Approval**

**Alberta**

| Month | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 15% | 20% | 15% | 11% | 17% | 21% | +7 |
| Jun. '25 | 13% | 21% | 18% | 7% | 17% | 24% | +10 |
| May '25 | 16% | 20% | 19% | 12% | 23% | 10% | +0 |
| Apr. '25 | 16% | 20% | 22% | 12% | 17% | 13% | +7 |
| Mar. '25 | 15% | 26% | 19% | 15% | 14% | 12% | +12 |
| Feb. '25 | 16% | 21% | 20% | 9% | 17% | 16% | +11 |
| Jan. '25 | 16% | 25% | 24% | 10% | 14% | 10% | +18 |

**Prairies**

| Month | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 10% | 22% | 21% | 12% | 7% | 29% | +13 |
| Jun. '25 | 14% | 15% | 21% | 9% | 14% | 27% | +6 |
| May '25 | 16% | 28% | 22% | 9% | 7% | 18% | +28 |
| Apr. '25 | 17% | 24% | 24% | 9% | 7% | 20% | +25 |
| Mar. '25 | 19% | 27% | 20% | 12% | 7% | 16% | +27 |
| Feb. '25 | 16% | 27% | 24% | 6% | 5% | 21% | +31 |
| Jan. '25 | 16% | 20% | 35% | 3% | 3% | 23% | +29 |

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

# AB Government Response to Trump's Presidency - Approve:

## Out of those who say approve, 34% think the provincial government is handling Trump well

**Q** Do you approve or disapprove of the way Alberta's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
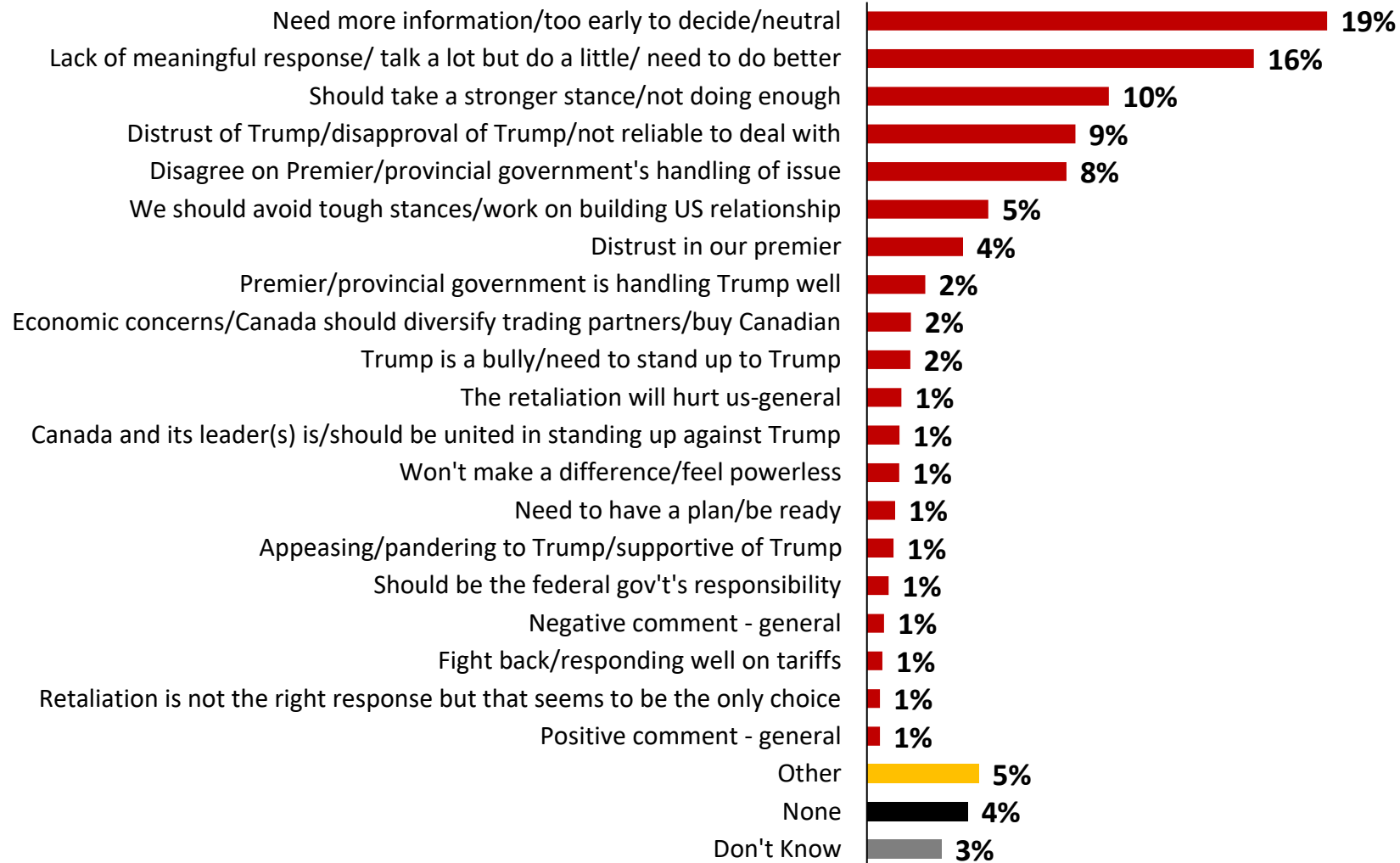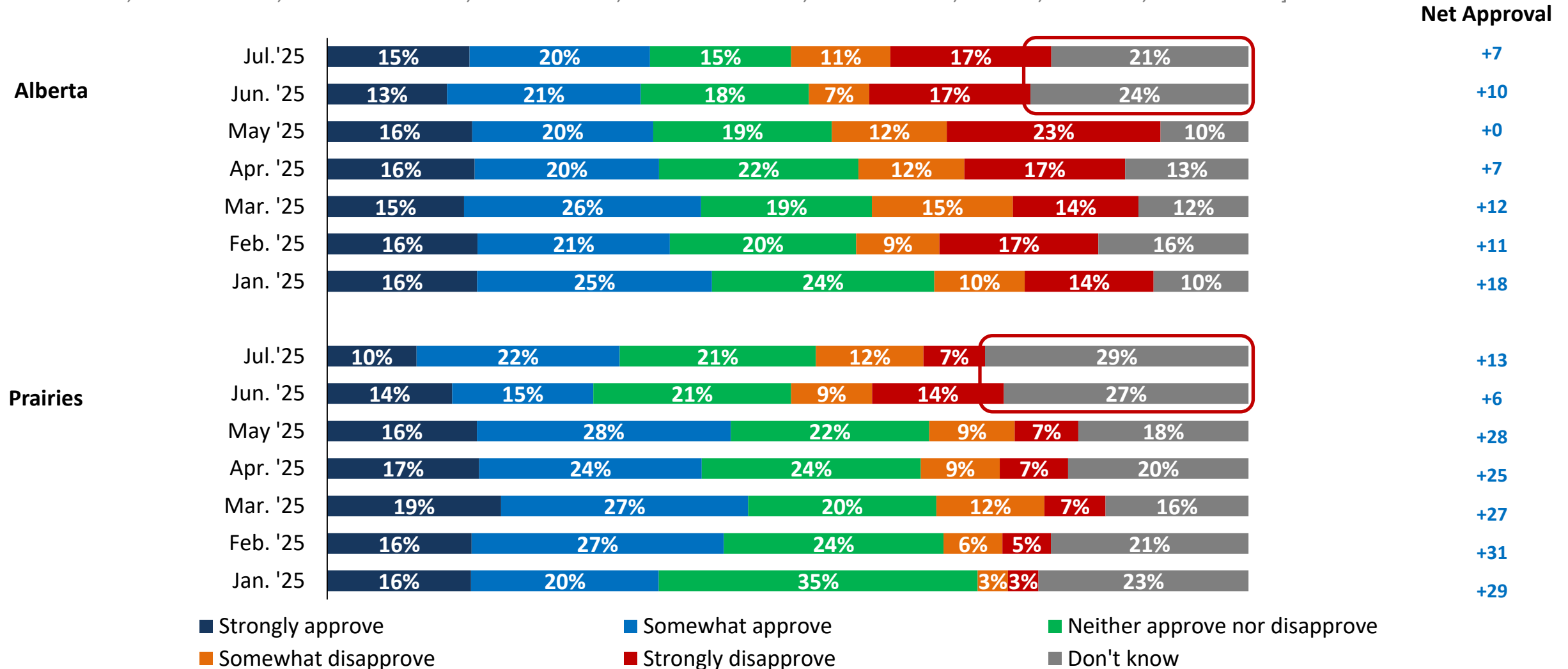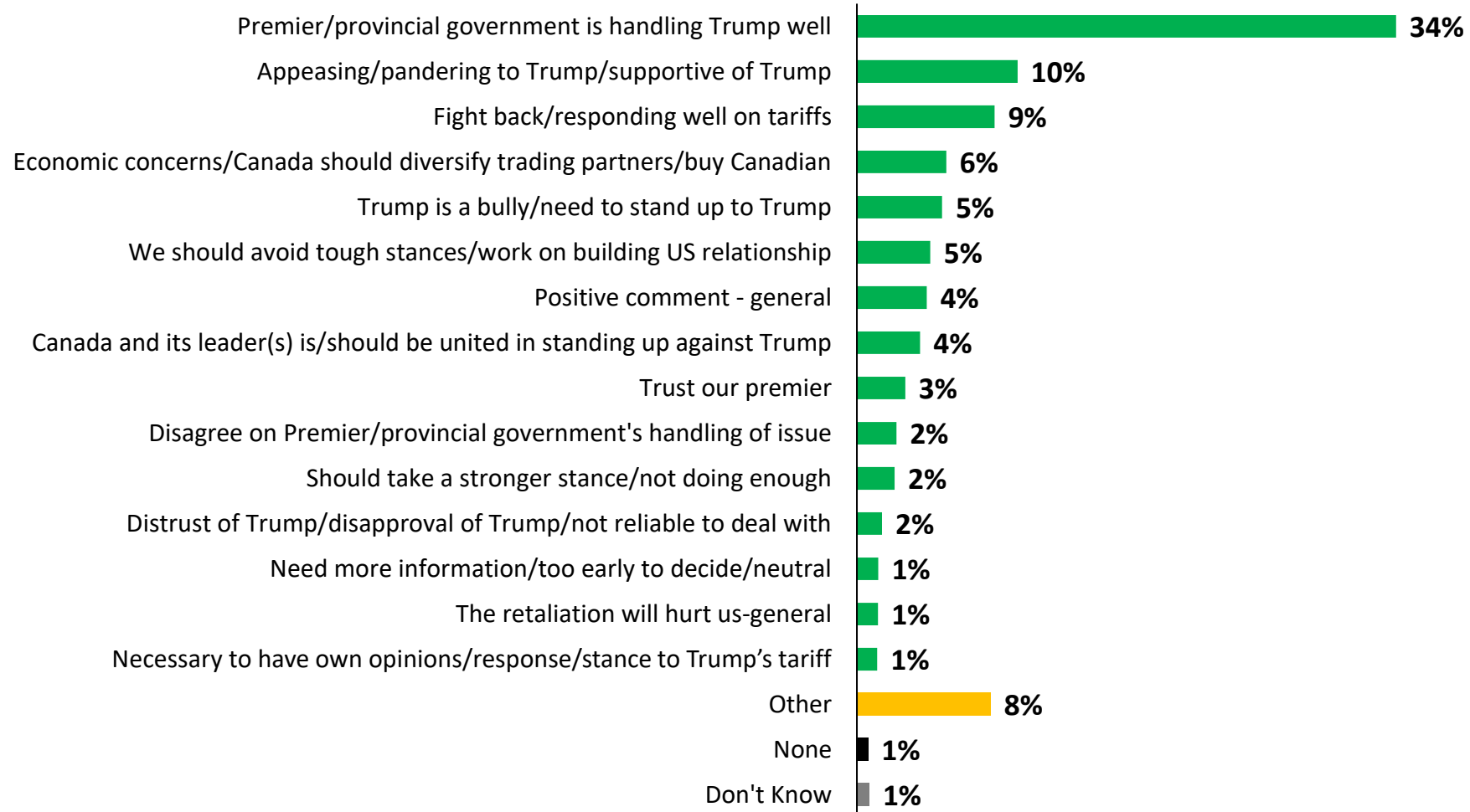[Asked Alberta Respondents; Those who said approve; n=134]

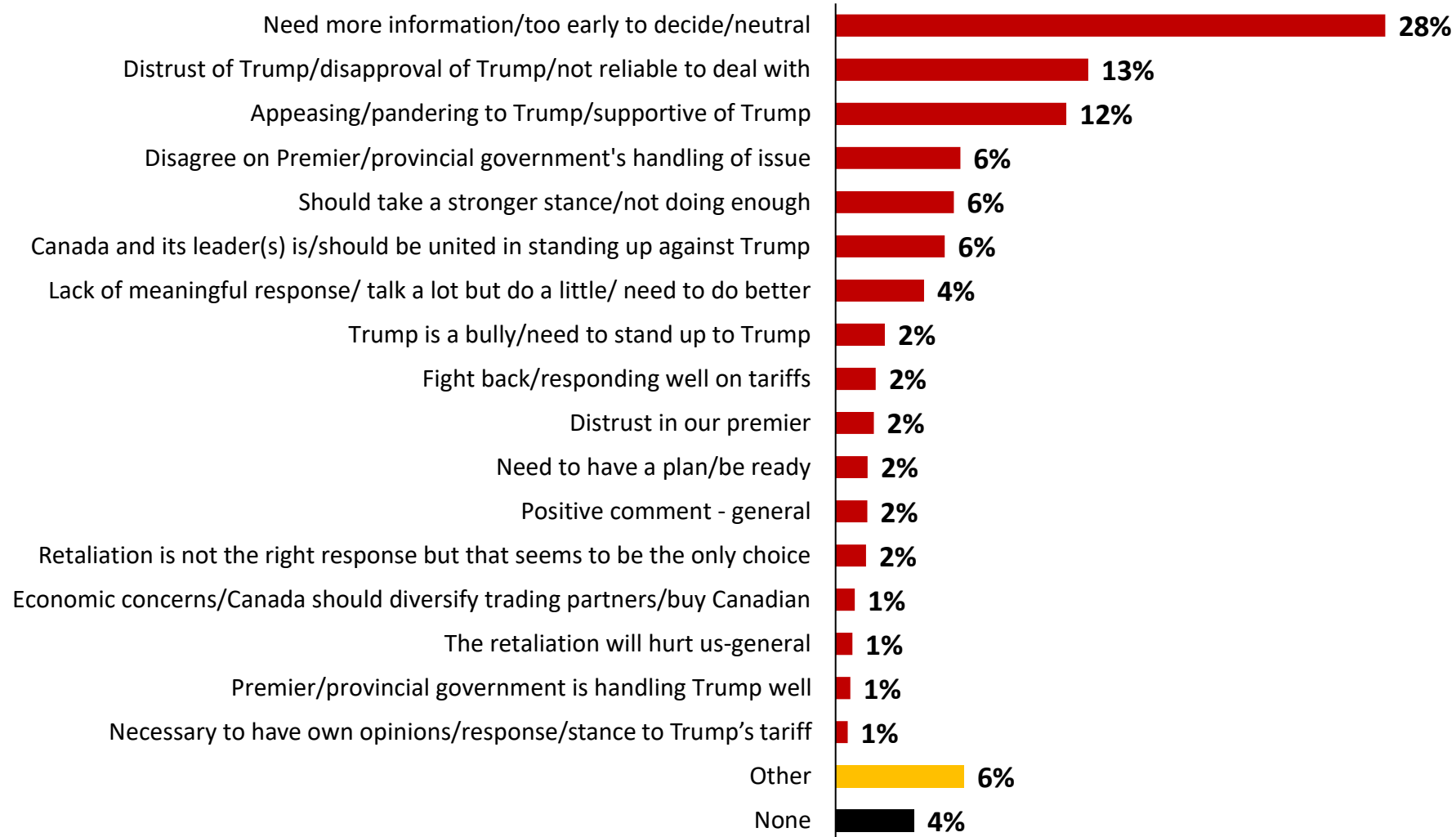| Response | % |
|---|---|
| Premier/provincial government is handling Trump well | 34% |
| Appeasing/pandering to Trump/supportive of Trump | 10% |
| Fight back/responding well on tariffs | 9% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 6% |
| Trump is a bully/need to stand up to Trump | 5% |
| We should avoid tough stances/work on building US relationship | 5% |
| Positive comment - general | 4% |
| Canada and its leader(s) is/should be united in standing up against Trump | 4% |
| Trust our premier | 3% |
| Disagree on Premier/provincial government's handling of issue | 2% |
| Should take a stronger stance/not doing enough | 2% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 2% |
| Need more information/too early to decide/neutral | 1% |
| The retaliation will hurt us-general | 1% |
| Necessary to have own opinions/response/stance to Trump's tariff | 1% |
| Other | 8% |
| None | 1% |
| Don't Know | 1% |

**Note**: 'Other' includes responses <1%,

# AB Government Response to Trump's Presidency - Disapprove:

## Out of those who say disapprove, over 1-in-4 (28%) need more information

**Q** Do you approve or disapprove of the way Alberta's government is responding to issues resulting from Donald Trump's presidency? And why do you say that?
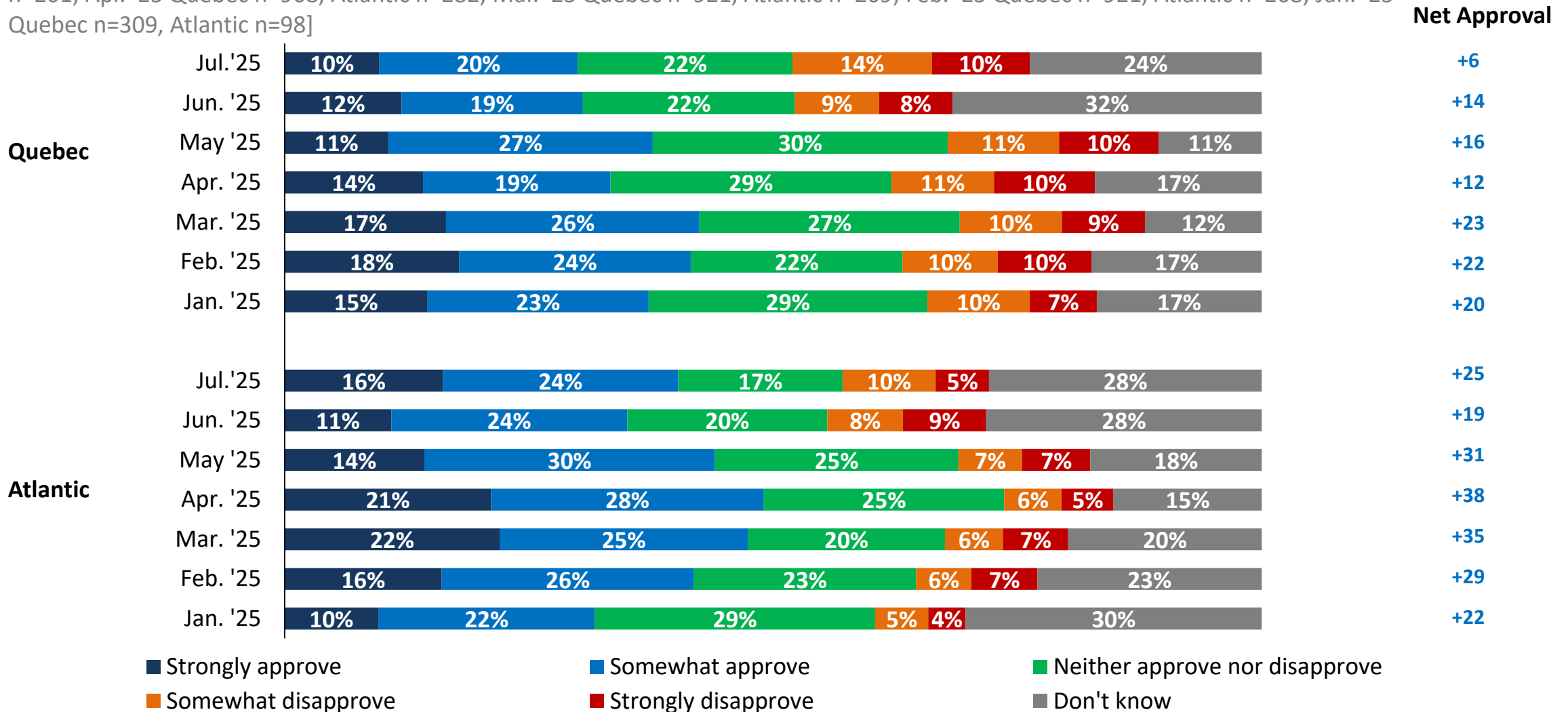[Asked Alberta Respondents; Those who said disapprove; n=103]

| Response | % |
|---|---|
| Need more information/too early to decide/neutral | 28% |
| Distrust of Trump/disapproval of Trump/not reliable to deal with | 13% |
| Appeasing/pandering to Trump/supportive of Trump | 12% |
| Disagree on Premier/provincial government's handling of issue | 6% |
| Should take a stronger stance/not doing enough | 6% |
| Canada and its leader(s) is/should be united in standing up against Trump | 6% |
| Lack of meaningful response/ talk a lot but do a little/ need to do better | 4% |
| Trump is a bully/need to stand up to Trump | 2% |
| Fight back/responding well on tariffs | 2% |
| Distrust in our premier | 2% |
| Need to have a plan/be ready | 2% |
| Positive comment - general | 2% |
| Retaliation is not the right response but that seems to be the only choice | 2% |
| Economic concerns/Canada should diversify trading partners/buy Canadian | 1% |
| The retaliation will hurt us-general | 1% |
| Premier/provincial government is handling Trump well | 1% |
| Necessary to have own opinions/response/stance to Trump's tariff | 1% |
| Other | 6% |
| None | 4% |

**Note**: 'Other' includes responses <1%, 'Refused/No comment' (1%) not shown

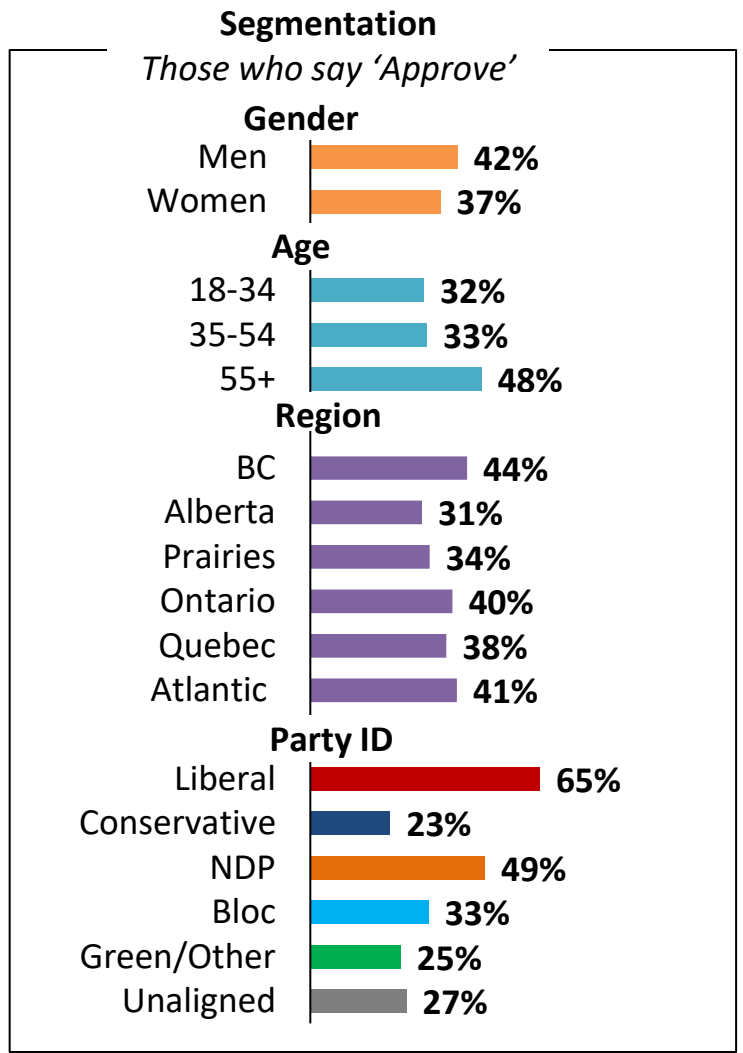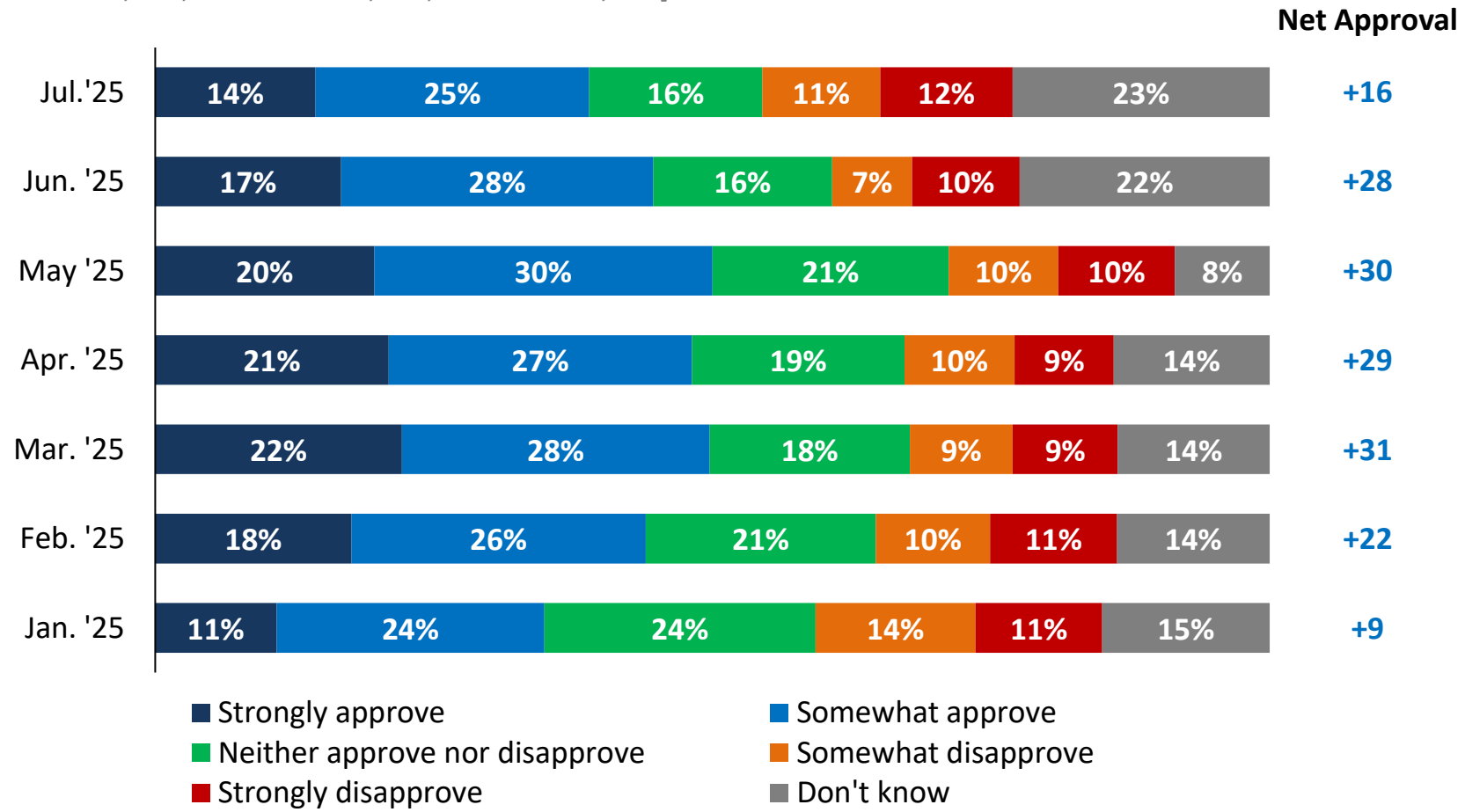# Provincial Government Approval: Net approval for Quebec's government further drops 8 points

**Q** Do you approve or disapprove of the way the [PROV] government is responding to issues resulting from Donald Trump's Presidency?
[asked of all respondents; Jul. '25 Quebec n=460, Atlantic n=134; Jun. '25 Quebec n=345, Atlantic n=101; May '25 Quebec n=690, Atlantic n=201; Apr. '25 Quebec n=968, Atlantic n=282; Mar. '25 Quebec n=921, Atlantic n=269; Feb. '25 Quebec n=921, Atlantic n=268; Jan. '25 Quebec n=309, Atlantic n=98]

**Net Approval**

### Quebec

| Month | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 10% | 20% | 22% | 14% | 10% | 24% | +6 |
| Jun. '25 | 12% | 19% | 22% | 9% | 8% | 32% | +14 |
| May '25 | 11% | 27% | 30% | 11% | 10% | 11% | +16 |
| Apr. '25 | 14% | 19% | 29% | 11% | 10% | 17% | +12 |
| Mar. '25 | 17% | 26% | 27% | 10% | 9% | 12% | +23 |
| Feb. '25 | 18% | 24% | 22% | 10% | 10% | 17% | +22 |
| Jan. '25 | 15% | 23% | 29% | 10% | 7% | 17% | +20 |

### Atlantic

| Month | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 16% | 24% | 17% | 10% | 5% | 28% | +25 |
| Jun. '25 | 11% | 24% | 20% | 8% | 9% | 28% | +19 |
| May '25 | 14% | 30% | 25% | 7% | 7% | 18% | +31 |
| Apr. '25 | 21% | 28% | 25% | 6% | 5% | 15% | +38 |
| Mar. '25 | 22% | 25% | 20% | 6% | 7% | 20% | +35 |
| Feb. '25 | 16% | 26% | 23% | 6% | 7% | 23% | +29 |
| Jan. '25 | 10% | 22% | 29% | 5% | 4% | 30% | +22 |

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

# Federal Government Approval: 12-point drop in net approval of the federal government's response to Trump related issues

**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; Jul. n=2,000; Jun. '25 n=1,500; May '25 n= 3,000; Apr. '25 n= 4,199; Mar. '25 n=4,000; Feb. '25 n= 4,000; Jan. '25 n=2,271]
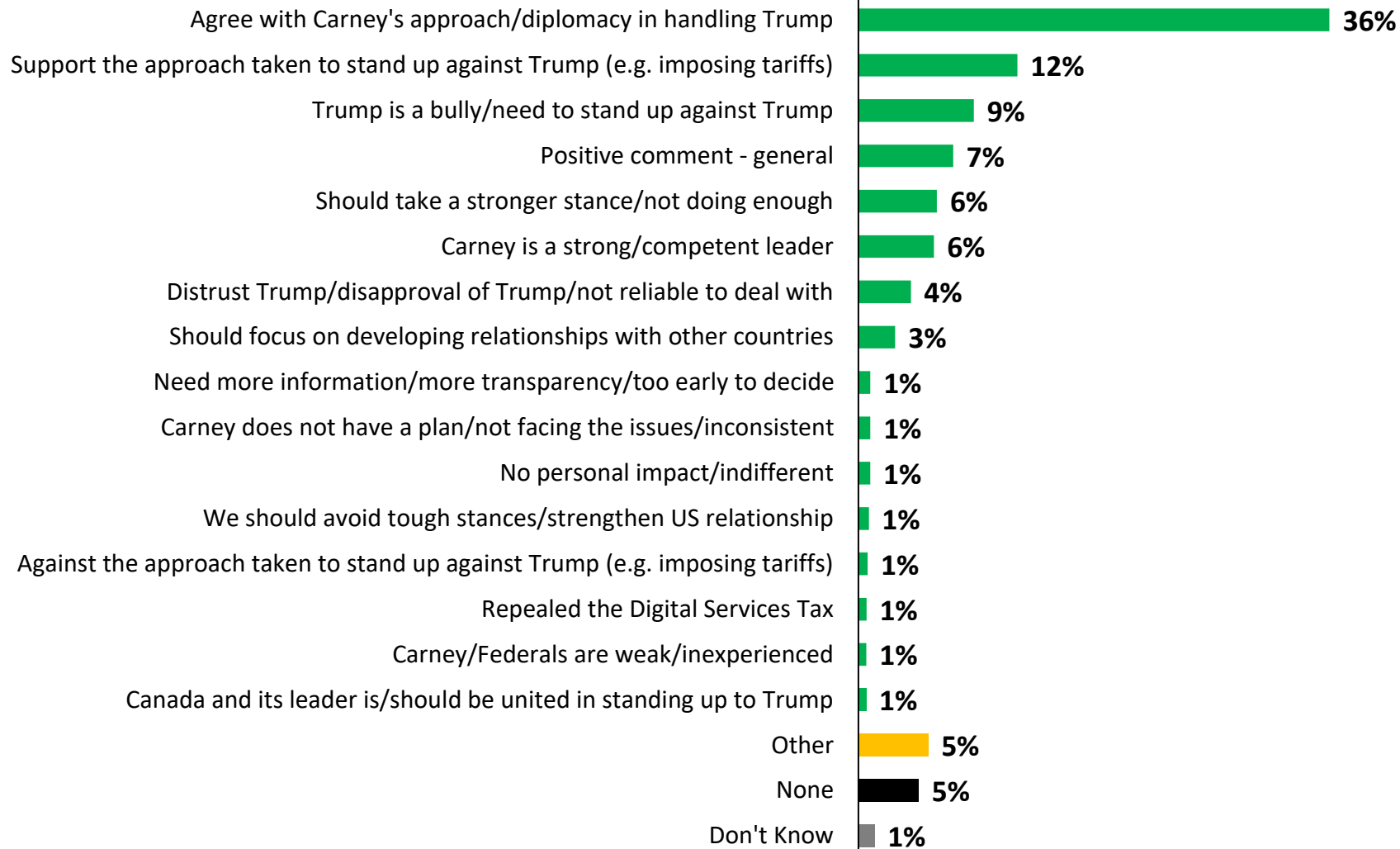
**Net Approval**

| Month | Strongly approve | Somewhat approve | Neither approve nor disapprove | Somewhat disapprove | Strongly disapprove | Don't know | Net Approval |
|---|---|---|---|---|---|---|---|
| Jul.'25 | 14% | 25% | 16% | 11% | 12% | 23% | +16 |
| Jun. '25 | 17% | 28% | 16% | 7% | 10% | 22% | +28 |
| May '25 | 20% | 30% | 21% | 10% | 10% | 8% | +30 |
| Apr. '25 | 21% | 27% | 19% | 10% | 9% | 14% | +29 |
| Mar. '25 | 22% | 28% | 18% | 9% | 9% | 14% | +31 |
| Feb. '25 | 18% | 26% | 21% | 10% | 11% | 14% | +22 |
| Jan. '25 | 11% | 24% | 24% | 14% | 11% | 15% | +9 |

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

**Segmentation**
*Those who say 'Approve'*

**Gender**
| | |
|---|---|
| Men | 42% |
| Women | 37% |

**Age**
| | |
|---|---|
| 18-34 | 32% |
| 35-54 | 33% |
| 55+ | 48% |

**Region**
| | |
|---|---|
| BC | 44% |
| Alberta | 31% |
| Prairies | 34% |
| Ontario | 40% |
| Quebec | 38% |
| Atlantic | 41% |

**Party ID**
| | |
|---|---|
| Liberal | 65% |
| Conservative | 23% |
| NDP | 49% |
| Bloc | 33% |
| Green/Other | 25% |
| Unaligned | 27% |

# Federal Government Response to Trump's Presidency - Approve:

## Out of people who approve, over 1-in-3 agree with Carney's approach in handling Trump

**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? And why do you say that?
[Asked All Respondents; Those who said approve; n=764]

| Response | % |
|---|---|
| Agree with Carney's approach/diplomacy in handling Trump | 36% |
| Support the approach taken to stand up against Trump (e.g. imposing tariffs) | 12% |
| Trump is a bully/need to stand up against Trump | 9% |
| Positive comment - general | 7% |
| Should take a stronger stance/not doing enough | 6% |
| Carney is a strong/competent leader | 6% |
| Distrust Trump/disapproval of Trump/not reliable to deal with | 4% |
| Should focus on developing relationships with other countries | 3% |
| Need more information/more transparency/too early to decide | 1% |
| Carney does not have a plan/not facing the issues/inconsistent | 1% |
| No personal impact/indifferent | 1% |
| We should avoid tough stances/strengthen US relationship | 1% |
| Against the approach taken to stand up against Trump (e.g. imposing tariffs) | 1% |
| Repealed the Digital Services Tax | 1% |
| Carney/Federals are weak/inexperienced | 1% |
| Canada and its leader is/should be united in standing up to Trump | 1% |
| Other | 5% |
| None | 5% |
| Don't Know | 1% |

**Note**: 'Other' includes responses <1%; 'Refused' (<1%) and 'Bad respondent' (<1%) not shown.

# Federal Government Response to Trump's Presidency - Disapprove:

## Out of people who disapprove, 19% think Carney/Federals are weak, another 19% think they should take a stronger stance

**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? And why do you say that?

[Asked All Respondents; Those who said disapprove; n=439]

| Response | % |
|---|---|
| Carney/Federals are weak/inexperienced | 19% |
| Should take a stronger stance/not doing enough | 19% |
| Carney does not have a plan/not facing the issues/inconsistent | 13% |
| Against the approach taken to stand up against Trump (e.g. imposing tariffs) | 8% |
| Negative comment - general | 6% |
| Distrust Trump/disapproval of Trump/not reliable to deal with | 4% |
| Distrust in the government to take the necessary actions | 4% |
| We should avoid tough stances/strengthen US relationship | 3% |
| Trump is a bully/need to stand up against Trump | 2% |
| Agree with Carney's approach/diplomacy in handling Trump | 2% |
| Repealed the Digital Services Tax | 2% |
| Support the approach taken to stand up against Trump (e.g. imposing tariffs) | 2% |
| Too aggressive/don't want to escalate things | 2% |
| Should focus on developing relationships with other countries | 1% |
| Canada and its leader is/should be united in standing up to Trump | 1% |
| No personal impact/indifferent | 1% |
| Other | 6% |
| None | 3% |
| Don't Know | 1% |

**Note**: 'Other' includes responses <1%, 'Bad respondent' (1%) not shown.

# PM's Read, Seen, Heard

# PM's Read, Seen, Heard: Among the 42% who had recently read, seen, or heard about PM, 40% report feeling more favourable

**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=1,500]
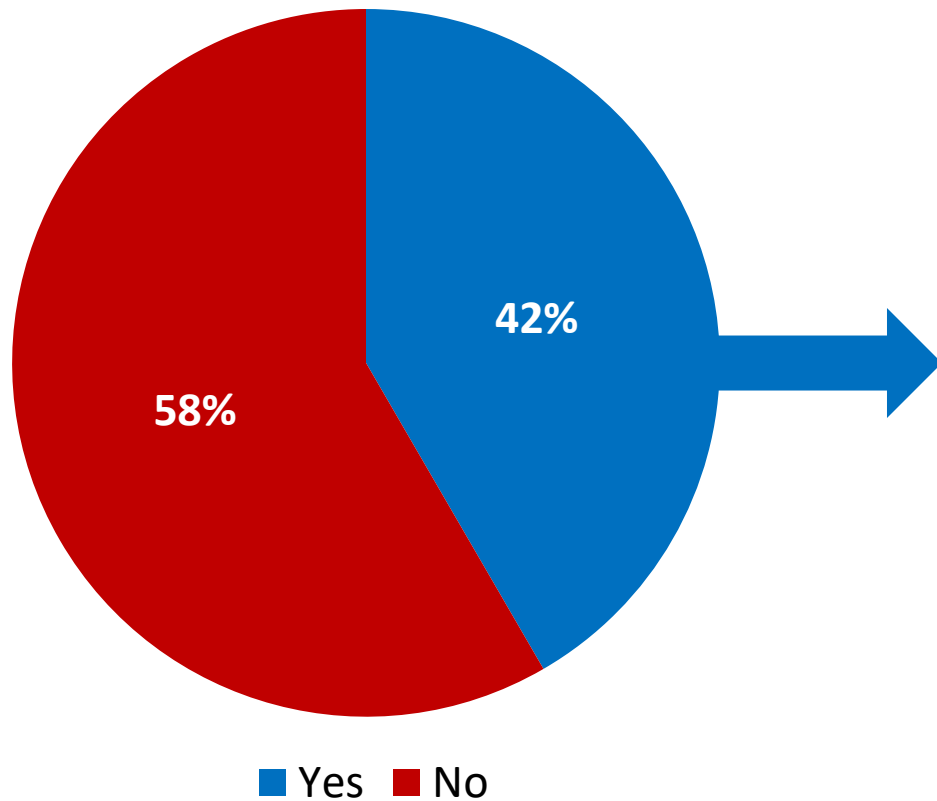
**Q** Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?
[asked of those who have RSH; n=849]



Pie chart: 42%, 58%

■ Yes  ■ No

Bar chart:
- A lot more favourable: 15%
- Somewhat more favourable: 25%
- Made no difference: 31%
- Somewhat less favourable: 11%
- A lot less favourable: 18%

Current data: June 2025

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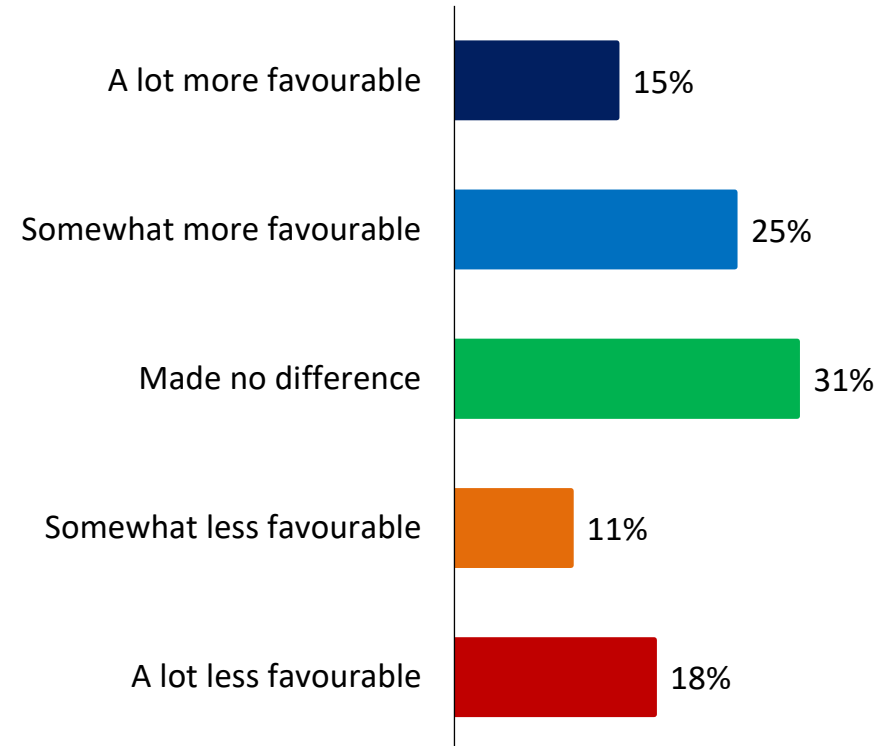
# Read, Seen, Heard Tracking: Further drop in following news about the Prime Minister

**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=2000]



55%

42%

Yes
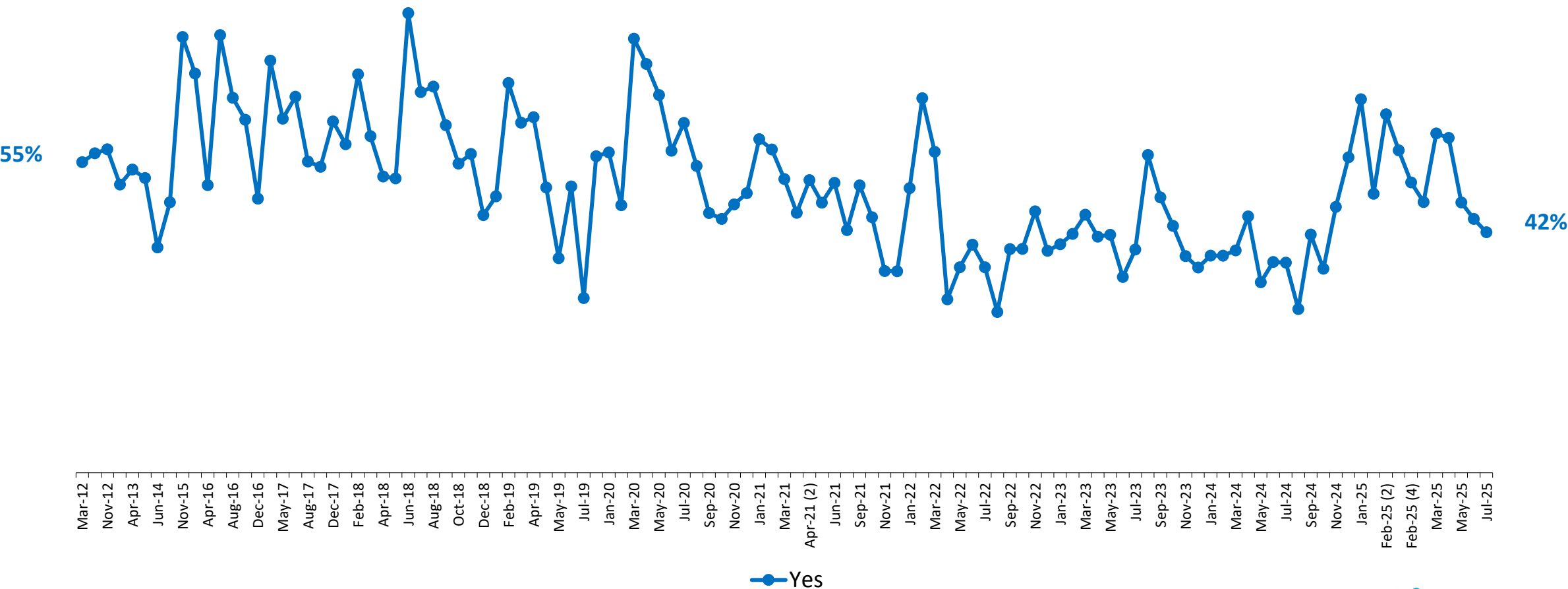
# PM's Read, Seen, Heard, Impact Tracking: Net favourability is 19 points lower than in June and at 12% is close to February levels

**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=849]



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

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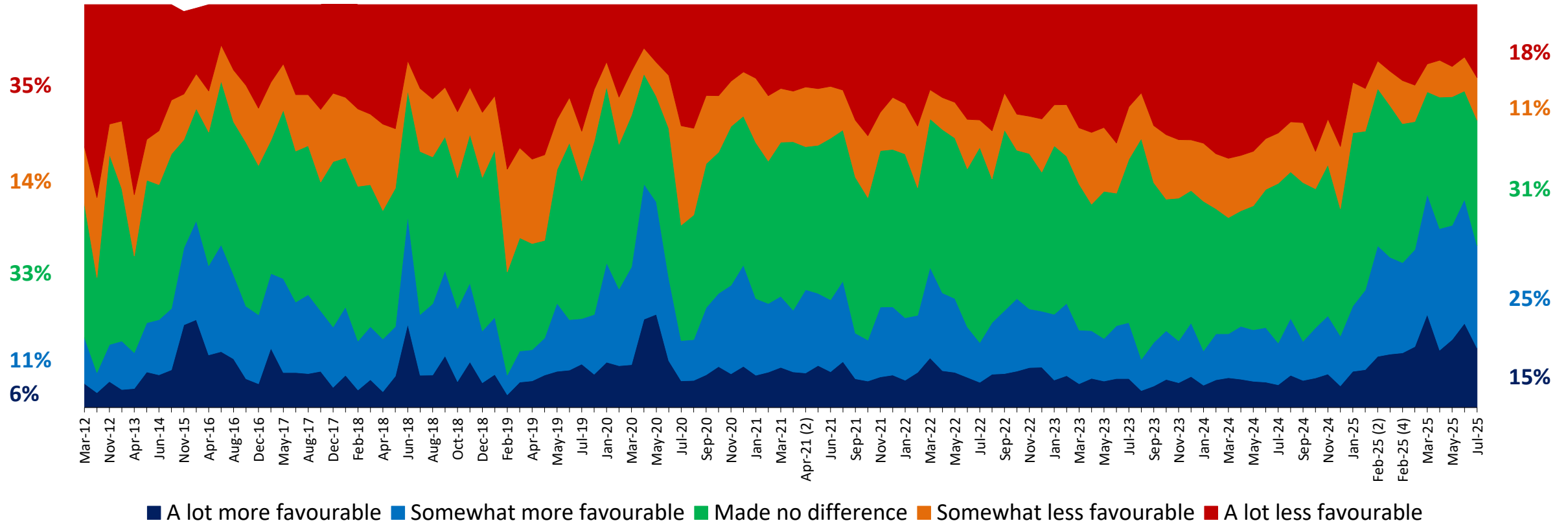
# Impact of RSH on PM and Federal Government:

**Trump Tariffs and Carney's meeting with premiers are strongly driving favourability, while caving to Trump on digital tax drew more unfavourable reactions**

**Q** And what have you read, seen or heard about Canada's Prime Minister and the Federal government in the last few days?  **Impact by RSH**

[Asked of those who RSH about Mark Carney and the Liberals; n=829]

| Category | % |
|---|---|
| Trump tariffs/trade talks/tariffs on steel | 33% |
| Meeting with Premiers/issues/trade agreements/no internal trade barriers | 9% |
| Caved to Trump on digital tax | 7% |
| Carney's responses to Trump/standing up for Canada | 4% |
| General comments - Digital tax | 4% |
| General negative opinions | 4% |
| Meeting with First Nations leaders | 3% |
| News/social media/announcements | 3% |
| Economic plans/focus on economic issues - general | 2% |
| Announcement of cuts to government funding | 2% |
| Establishing new trade agreements/moving away from USA | 2% |
| General positive opinions | 2% |
| Carney's meeting with Trump/Canada becoming a 51st state | 2% |
| Controversy regarding personal investments/blind trust | 2% |
| Bill C5 passed/fast track bills (positive comments) | 1% |
| Calgary Stampede | 1% |
| On vacation in undisclosed location | 1% |
| Pipeline proposal | 1% |
| Spending taxpayers' money | 1% |
| Immigration laws/Border security | 1% |
| Bill C5 passed/fast track bills (negative comments) | 1% |
| Canada host G7 summit | 1% |
| NATO (increasing spending/travel to europe to attend the meeting) | 1% |
| Budget deficit | 1% |
| Middle-class tax cut announcement | 1% |
| Increase military spending | 1% |
| Infrastructure speedup bill/increase spending on infrastructure projects | 1% |
| Support for Ukraine | 1% |
| RSH about Carney's involvement on the Israel-Palestine/Gaza conflict | 1% |
| Other | 6% |
| Don't Know | 1% |

| | More fav. | No Difference | Less fav. | NET |
|---|---|---|---|---|
| Trump tariffs/trade talks/tariffs on steel | 44% | 37% | 19% | +25 |
| Meeting with Premiers/issues/trade agreements/no internal trade barriers | 52% | 39% | 9% | +43 |
| Caved to Trump on digital tax | 5% | 23% | 72% | -67 |

**Note**: 'Other' contains all responses <1%. 'Refused' (1%) and 'Bad respondent' (1%) not shown.

# Impact of RSH on PM and Federal Government (Verbatim):

## Trump tariffs/ tariffs on steel, meeting with premiers had most mentions

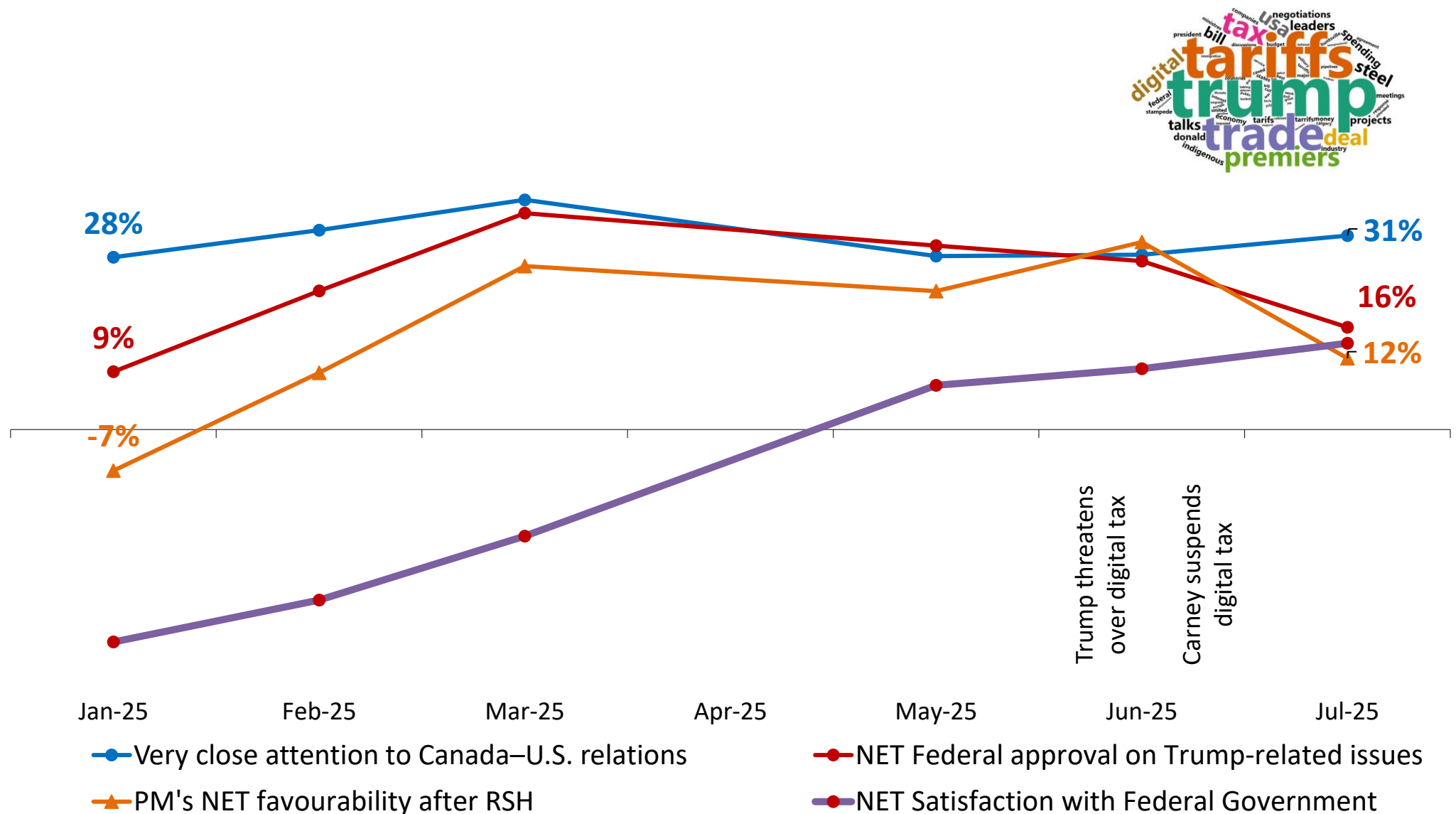**Q** And what have you read, seen or heard about Canada's Prime Minister and the Federal government in the last few days?

[Asked of those who RSH about Mark Carney and the Liberals; n=829]

### Trump tariffs/trade talks/tariffs on steel

*"The Prime Minister announced help for the steel industry, which is being hit hard by tariffs. Also, the government is trying to negotiate with the USA on tariffs."*

*"Negotiating tariff deal with the US."*

*"Met with steelworkers and placed a 50% tariff on steel coming from China in order for Canadian companies to buy Canadian."*

*"Mark Carney implementing content tariffs on US steel."*

### Meeting with Premiers/issues/trade agreements/no internal trade barriers

*"The first ministers' meeting in Huntville."*

*"Prime Minister Carney has been attending the First Ministers' meetings in the Haliburton, Ontario area. They have been discussing trade, tariffs, and I believe will discuss healthcare."*

*"I've heard about his plans to facilitate interprovincial trade, enhance trading relations with the EU and others, to promote large scale infrastructure programs, and to conclude negotiations of a new trade deal with the U.S."*

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# RSH Prime Minister and Federal Government (Word Cloud):

**Top RSH words are Tariffs, Trump, Tax and Trade**

**Q** And what have you read, seen or heard about Canada's Prime Minister and the Federal government in the last few days? [OPEN ENDED]

[Asked of those who RSH about Mark Carney and the Liberals; n=829]

# Canada-U.S. Trade Narrative: High awareness does not translate into increased support for the governments and PM's handling of Trump



Current data: July 2025

Legend:
- Very close attention to Canada–U.S. relations
- PM's NET favourability after RSH
- NET Federal approval on Trump-related issues
- NET Satisfaction with Federal Government

Data labels: 28%, 31%, 9%, 16%, -7%, 12%

Annotations: Trump threatens over digital tax; Carney suspends digital tax

X-axis: Jan-25, Feb-25, Mar-25, Apr-25, May-25, Jun-25, Jul-25

# Special Topics – Digital Tax

# Digital Service Tax Awareness: 55% of Canadians are aware of it; men (64%), liberals (66%), and older (65%) are more likely to follow it

**Q** At the end of June, Donald Trump said he was terminating all trade discussions with Canada because Canada was implementing a new digital service tax that applied to US tech companies such as Amazon, Google, Facebook, Uber and AirBnB. On Sunday, the federal government announced it was repealing the levy to bring the US back to the negotiations table.

How closely have you been following these developments?
[asked of all respondents; n=2,000]

Closely: 55%

| Very closely | Somewhat closely | Not very closely | Not closely at all | Don't know |
|:---:|:---:|:---:|:---:|:---:|
| 19% | 37% | 23% | 18% | 3% |
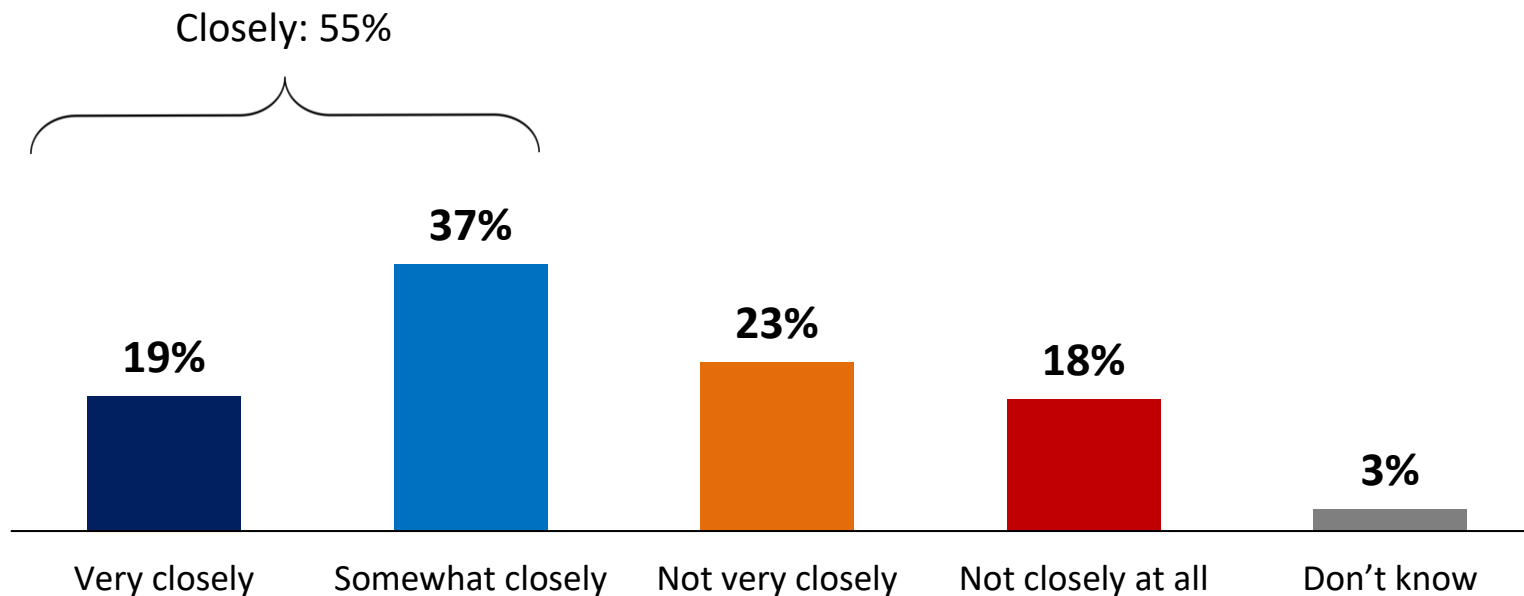
**Segmentation**
*Those who say 'Closely'*

**Gender**
| | |
|---|---|
| Men | 64% |
| Women | 47% |

**Age**
| | |
|---|---|
| 18-34 | 47% |
| 35-54 | 51% |
| 55+ | 65% |

**Region**
| | |
|---|---|
| BC | 60% |
| Alberta | 54% |
| Prairies | 52% |
| Ontario | 60% |
| Quebec | 47% |
| Atlantic | 54% |

**Party ID**
| | |
|---|---|
| Liberal | 66% |
| Conservative | 60% |
| NDP | 56% |
| Bloc | 43% |
| Green/Other | 61% |
| Unaligned | 34% |
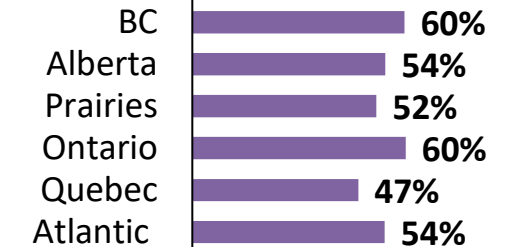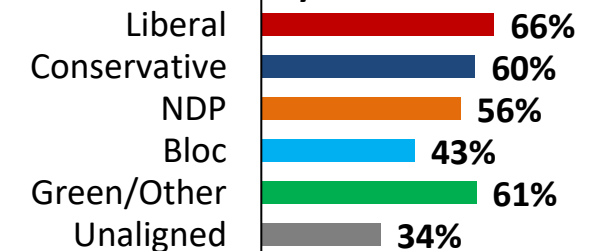
# Digital Service Tax: 48% Canadians think digital tax is a good idea, and 32% that it is a bad idea; Conservatives are least likely to support it

**Q** Do you think the general idea of imposing digital service tax that applied to US tech companies such as Amazon, Google, Facebook, Uber and AirBnB is a good idea or a bad idea?
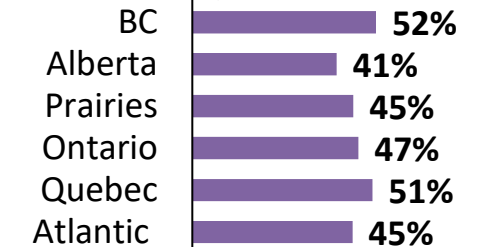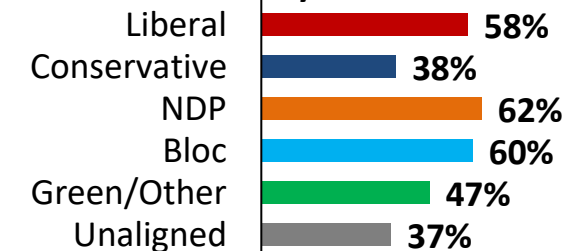[asked of all respondents; n=2,000]

Good idea: 48%

| | |
|---|---|
| Strongly a good idea | 19% |
| Somewhat a good idea | 29% |
| Somewhat a bad idea | 16% |
| Strongly a bad idea | 16% |
| Don't know | 21% |
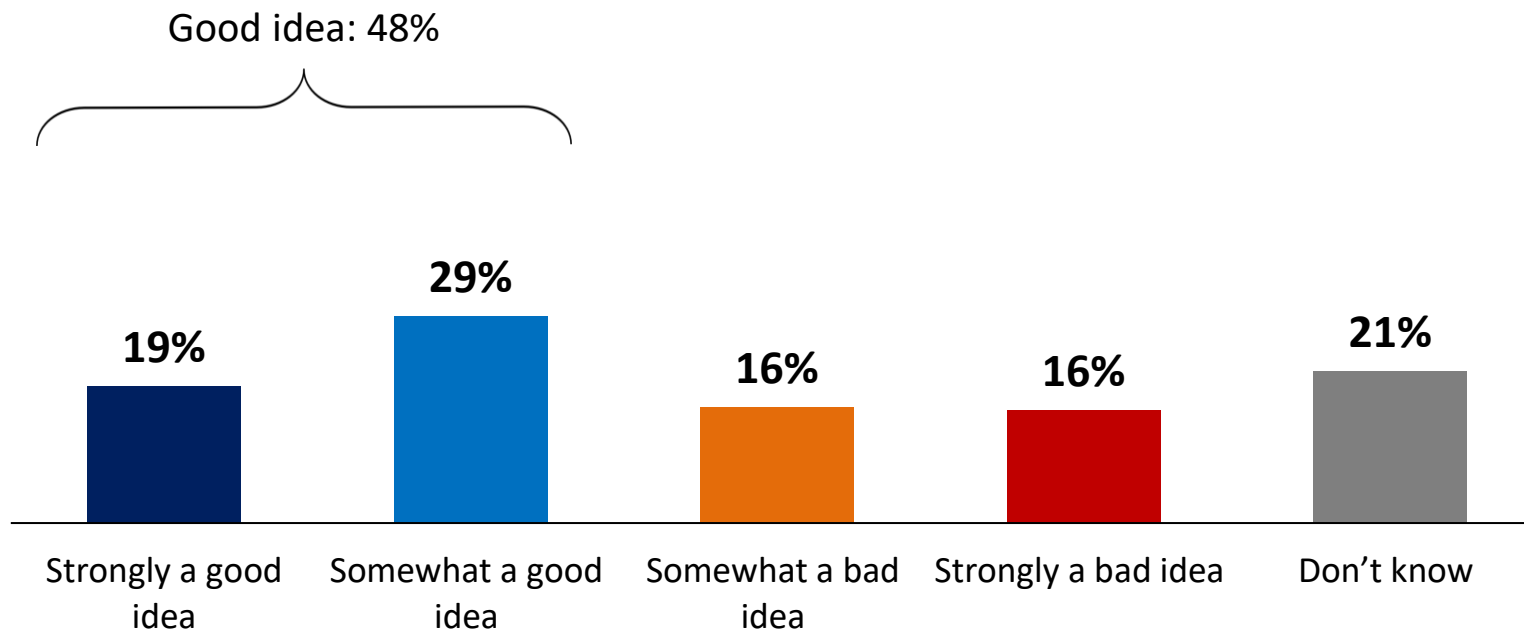
**Segmentation**
*Those who say 'Good idea'*

**Gender**
| | |
|---|---|
| Men | 55% |
| Women | 40% |

**Age**
| | |
|---|---|
| 18-34 | 41% |
| 35-54 | 45% |
| 55+ | 54% |

**Region**
| | |
|---|---|
| BC | 52% |
| Alberta | 41% |
| Prairies | 45% |
| Ontario | 47% |
| Quebec | 51% |
| Atlantic | 45% |

**Party ID**
| | |
|---|---|
| Liberal | 58% |
| Conservative | 38% |
| NDP | 62% |
| Bloc | 60% |
| Green/Other | 47% |
| Unaligned | 37% |

# Carney's Repeal: 40% Liberals think Carney was right to suspend it, vs 23% NDPs or 30% Conservatives

**Q** Do you think Mark Carney was right or wrong to repeal the digital service tax that applied to US tech companies after the US threat to terminate all trade negotiations with Canada?

[asked of all respondents; n=2,000]

| Category | Value |
|---|---|
| Right to suspend the digital service tax | 30% |
| Wrong to suspend the digital service tax | 26% |
| Never should have imposed the digital service tax in the first place | 18% |
| Don't know | 27% |
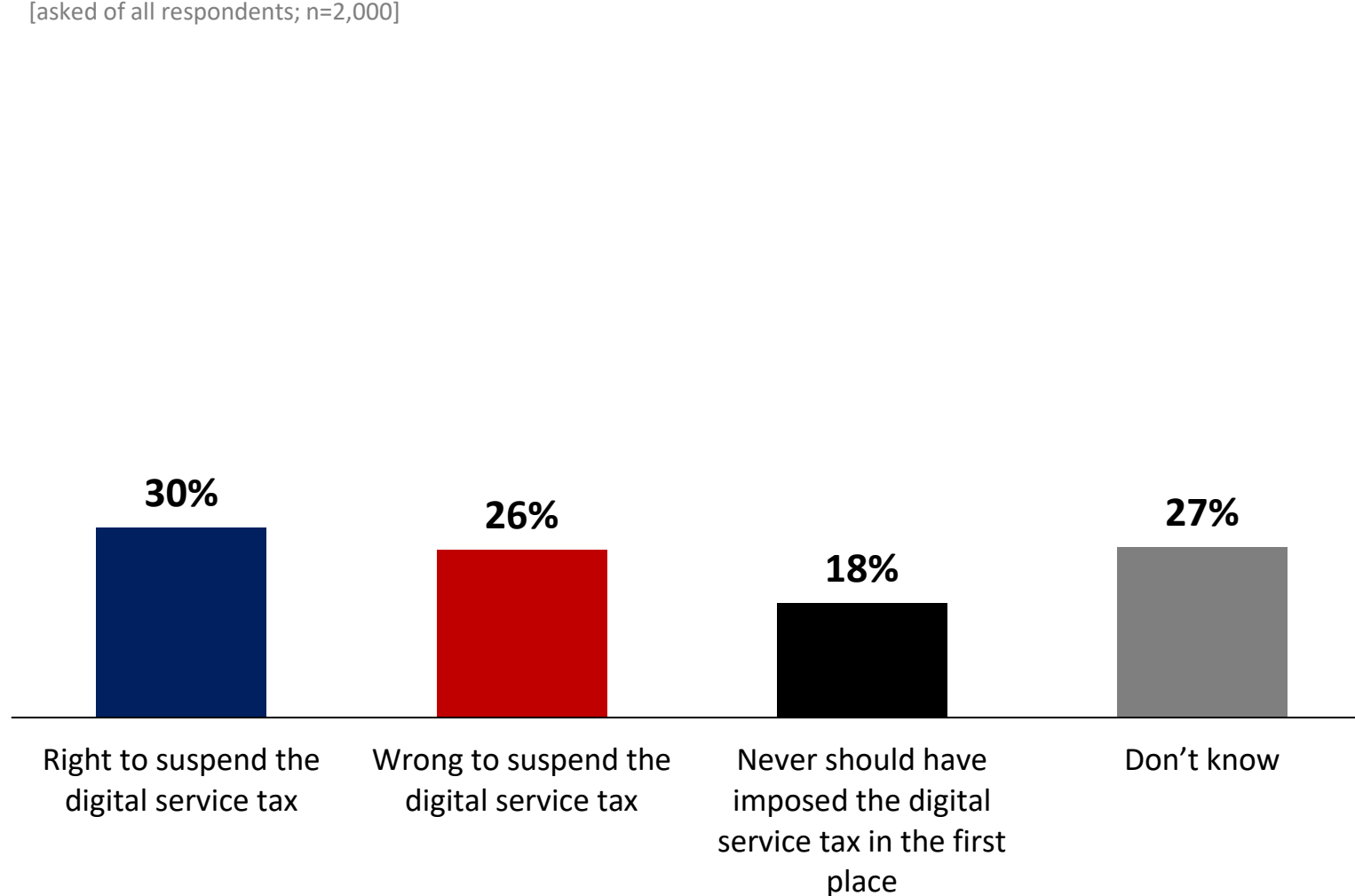
**Segmentation**
*Those who say 'Right to suspend…'*

**Gender**
- Men — 32%
- Women — 27%

**Age**
- 18-34 — 32%
- 35-54 — 26%
- 55+ — 31%

**Region**
- BC — 28%
- Alberta — 28%
- Prairies — 31%
- Ontario — 30%
- Quebec — 30%
- Atlantic — 29%

**Party ID**
- Liberal — 40%
- Conservative — 30%
- NDP — 23%
- Bloc — 30%
- Green/Other — 21%
- Unaligned — 19%
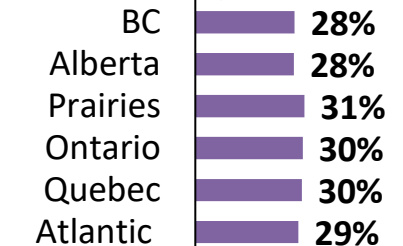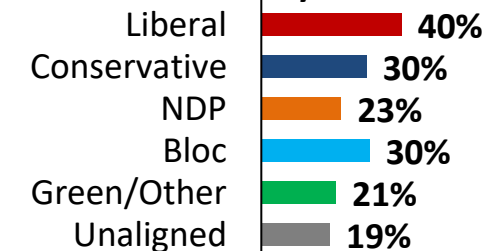
# Mark Carney Favourability: 37% Canadians did not change opinion of Carney because of digital tax; 24% are now more and 27% less favourable

**Q** Do these events leave you feeling more favourable or less favourable towards Mark Carney?
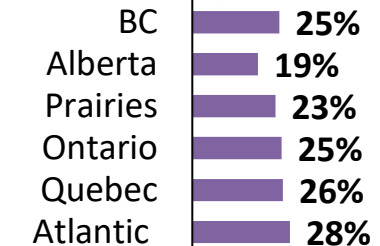[asked of all respondents; n=2,000]

More favourable: 24%

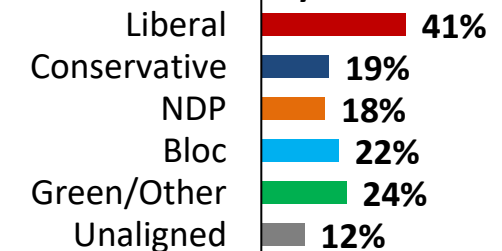| A lot more favourable | Somewhat more favourable | Neither more nor less favourable | Somewhat less favourable | A lot less favourable | Don't know |
|---|---|---|---|---|---|
| 9% | 16% | 37% | 14% | 13% | 12% |
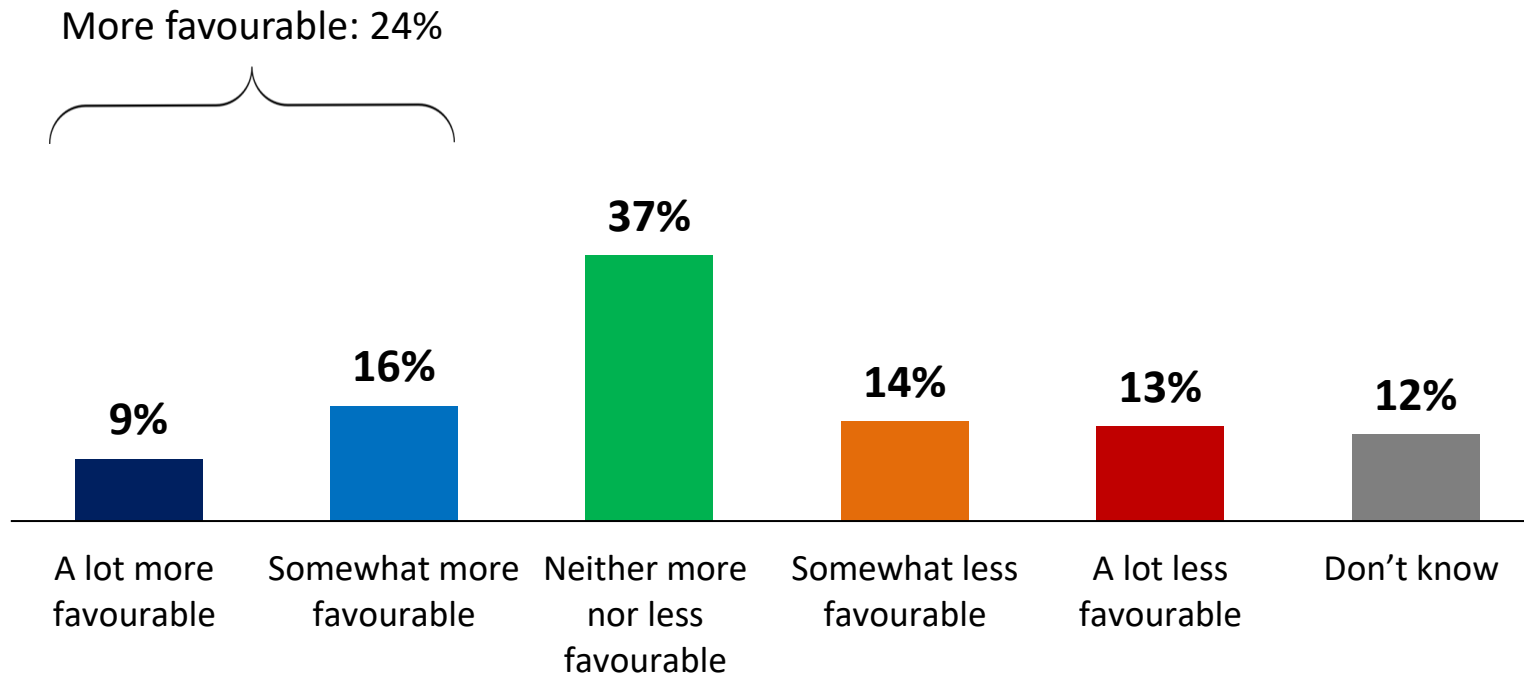
**Segmentation**
*Those who say 'More favourable'*

**Gender**
| | |
|---|---|
| Men | 27% |
| Women | 23% |

**Age**
| | |
|---|---|
| 18-34 | 33% |
| 35-54 | 22% |
| 55+ | 21% |

**Region**
| | |
|---|---|
| BC | 25% |
| Alberta | 19% |
| Prairies | 23% |
| Ontario | 25% |
| Quebec | 26% |
| Atlantic | 28% |

**Party ID**
| | |
|---|---|
| Liberal | 41% |
| Conservative | 19% |
| NDP | 18% |
| Bloc | 22% |
| Green/Other | 24% |
| Unaligned | 12% |

# Methodology

# Survey Methodology - National

**These are the results of an online survey conducted between July 04 and July 28, 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.

**Sample Size:** n=3,732 Canadian citizens, 18 years or older. The results are nationally weighted to n=2,000 based on Census data from Statistics Canada.

**Field Dates**: July 04 and July 28, 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. 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 | 335 | 9% | 266 | 13.4% |
| Men 35-54 | 543 | 14.6% | 319 | 16% |
| Men 55+ | 979 | 26.4% | 386 | 19.4% |
| Women 18-34 | 358 | 9.6% | 260 | 13.1% |
| Women 35-54 | 573 | 15.4% | 329 | 16.6% |
| Women 55+ | 927 | 25% | 429 | 21.6% |
| | | | | |
| British Columbia | 549 | 14.7% | 280 | 14% |
| Alberta | 473 | 12.7% | 224 | 11.2% |
| Prairies | 248 | 6.6% | 130 | 6.5% |
| Ontario | 1,372 | 36.8% | 772 | 38.6% |
| Québec | 796 | 21.3% | 460 | 23% |
| Atlantic | 294 | 7.9% | 134 | 6.7% |

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# Building Understanding.

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