

# Canada This Month Federal Vote And Leadership

Public Opinion Research  
Release Date: Sept 1<sup>st</sup>, 2025  
Field Dates: July 04 and July 28, 2025

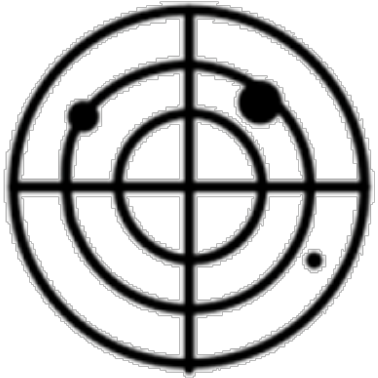
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# Study Overview

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

- **Federal vote**
- **Federal leadership**



# Key Findings

1

**Liberals are just narrowly ahead of Conservatives at 41% vs 39% among decided voters**, and similar to slight June lead. Men are split between Liberals (37%) and Conservatives (38%). Middle-aged 35-54 are more likely to be Conservative (37% vs 30%), and 55+ are more likely to be Liberal (42% vs 34%).

2

**Federal government approval continues its upward trend, with 54% now satisfied (13 points up since March)**, against a backdrop of economic uncertainty (62% say that it is more difficult to get by, and 33% identify as “Strugglers”) and Canada-U.S. tariff tensions. This is in contrast with lower approval of Trump-related responses, suggesting that Canadians differentiate between broader federal government performance and specific Canada-U.S. issues.

3

**Approval of the federal government’s handling of Trump-related issues falls to 39%**. Net favourability (after RSH) has decreased by 19 points since June, returning to February levels, now at 12 points. Among disapprovers, 19% see Carney’s government as weak, and another 19% want a firmer stance on trade and tariff disputes.

4

**Mark Carney continues to maintain a strong lead as preferred PM**. 50% hold a favourable view of Carney (net score of +20), compared to 37% for Poilievre (net score of -6). On the “Best Prime Minister” question, Carney leads Poilievre 40% to 29% nationally, and holds an even larger lead in Quebec (+26 points).

5

**However, “read, seen, heard” shows that Carney’s image is being defined disproportionately by the tariff war and the Canada-U.S. trade-related issues.**

# Key Voter Segments

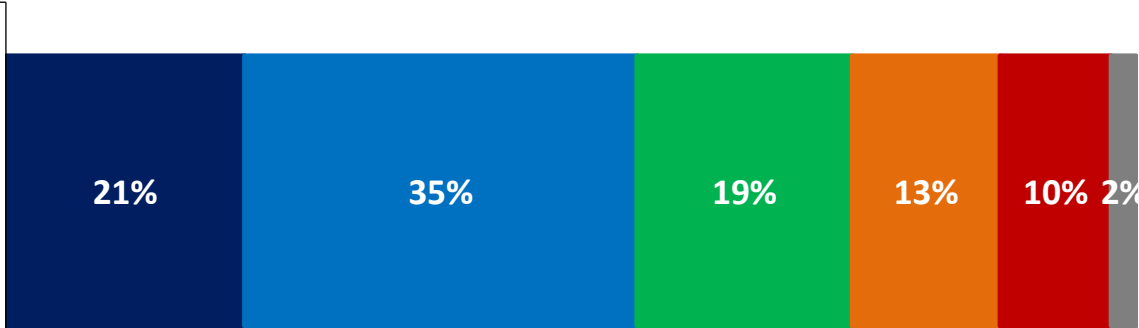


# Economic Gap Segmentation Attitudes: Over half (56%) say you can be anything you want; 62% say its more difficult to get by every year



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



No matter how hard I work, every year it seems more difficult to get by



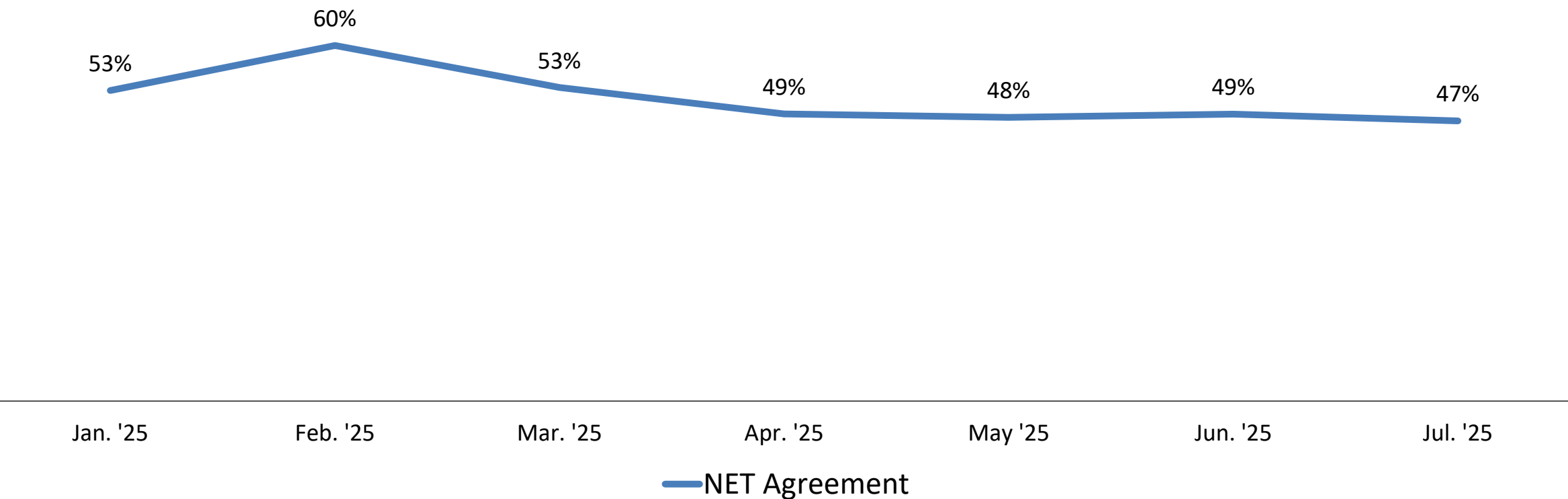
Strongly agree   Somewhat agree   Neither agree nor disagree   Somewhat disagree   Strongly disagree   Don't know



# Segmentation Attitudes:

Q Do you agree or disagree with the following statements? -  
[asked of all respondents]

*“No matter how hard I work, every year it seems more difficult to get by”*

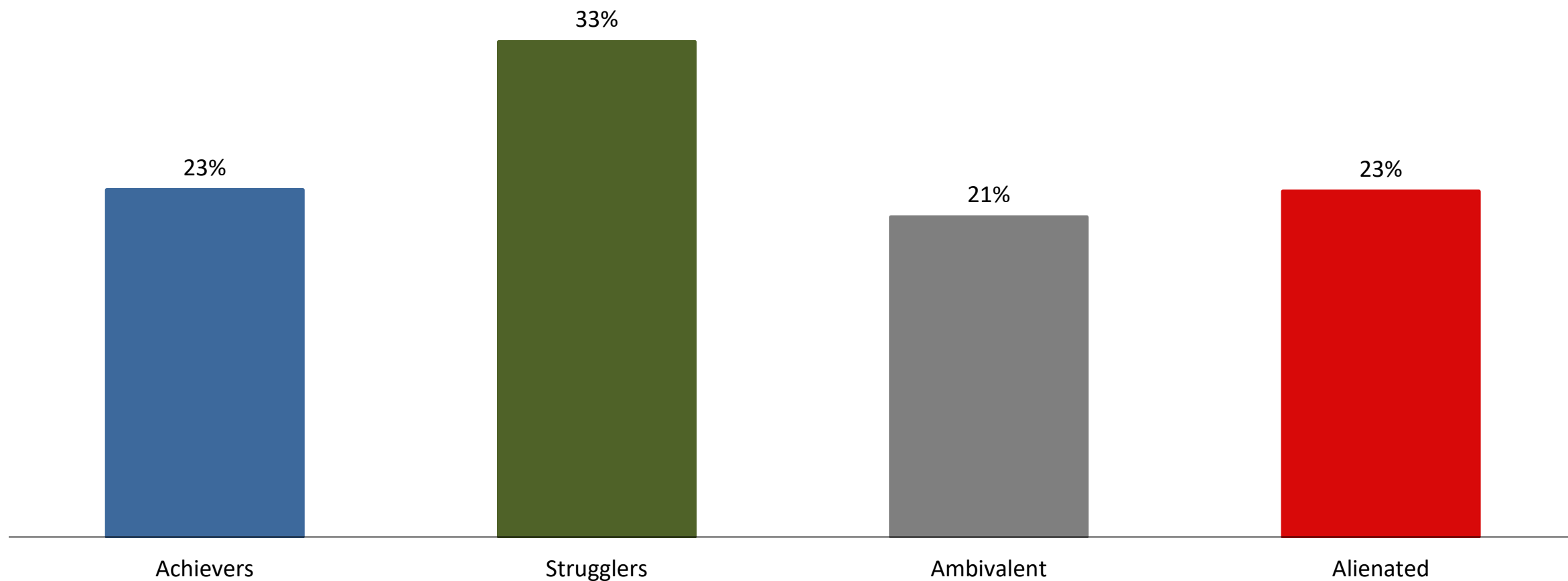


# Economic Gap Segmentation: 1-in-3 are strugglers, followed by Achievers and Alienated at 23%



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]

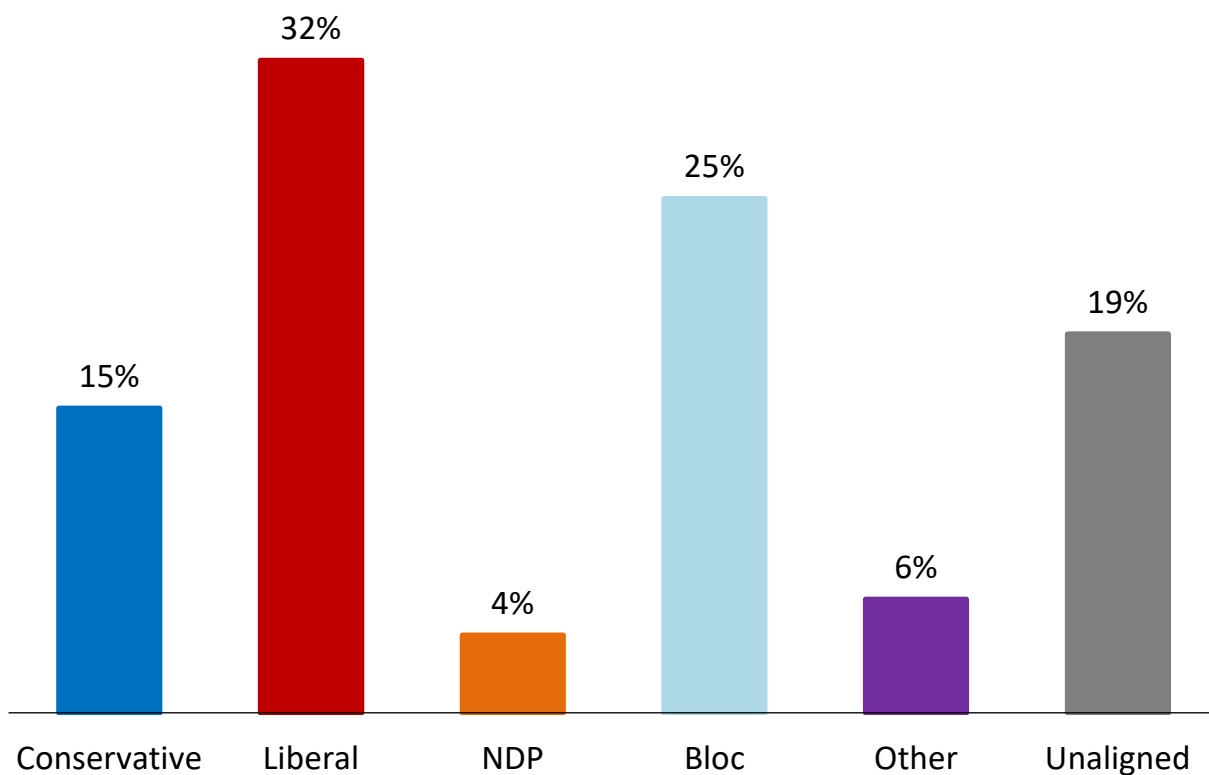




# Federal Party ID (Quebec vs. ROC): The Conservatives hold a 7-point lead in the ROC, while the Liberals are ahead of Bloc by 7 points in QC

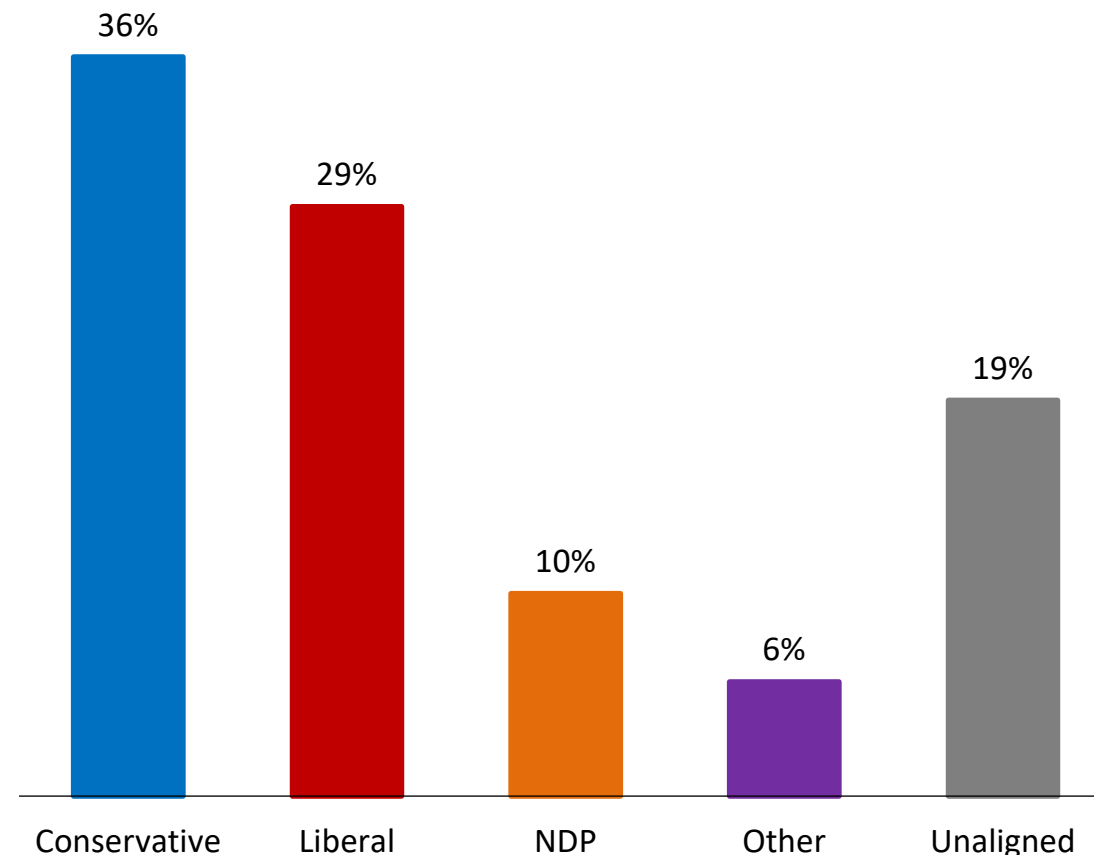
## Party ID: Quebec

[Respondents in Quebec; n=460]



## Party ID: Rest of Canada

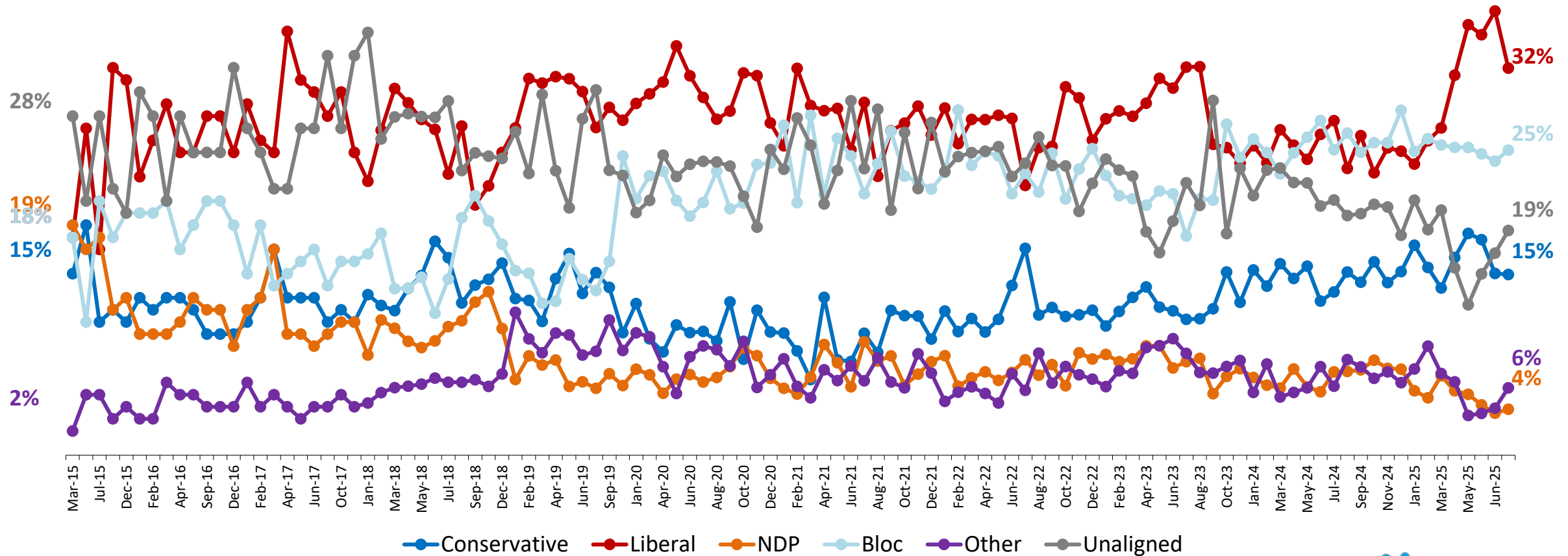
[Respondents in the rest of Canada; n=1,540]



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



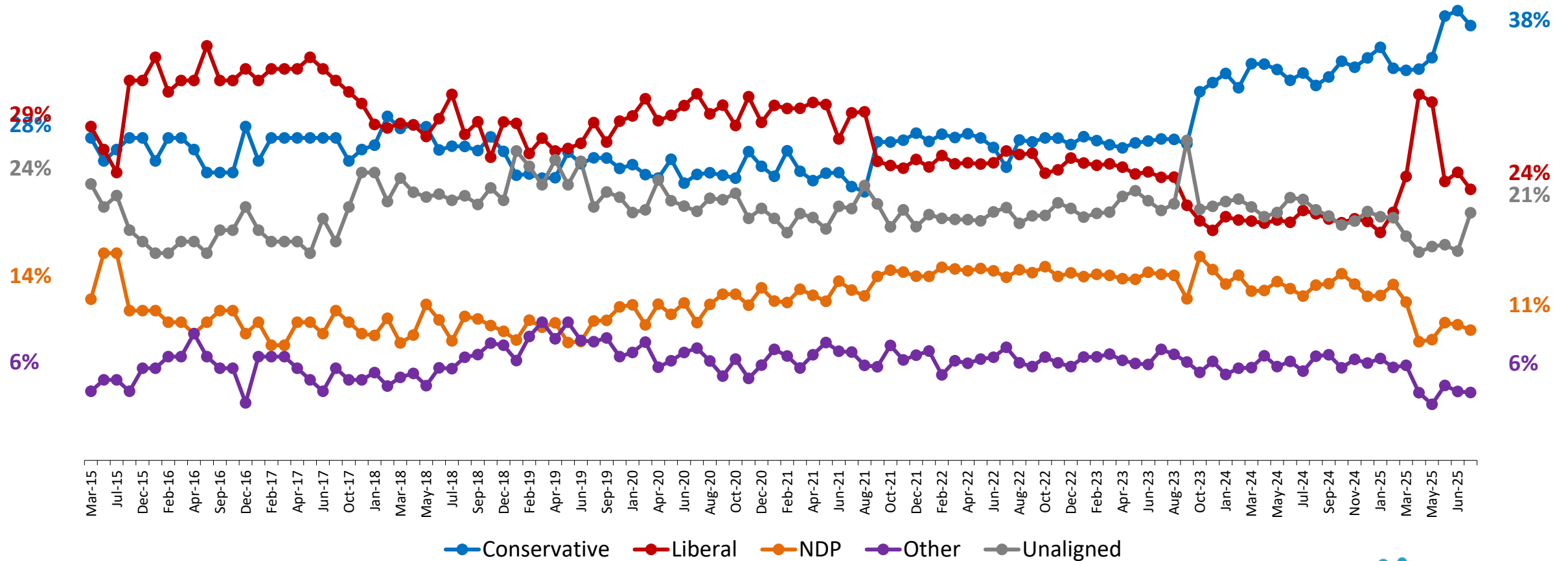
Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...  
[asked of those in Quebec; n=460]



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



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

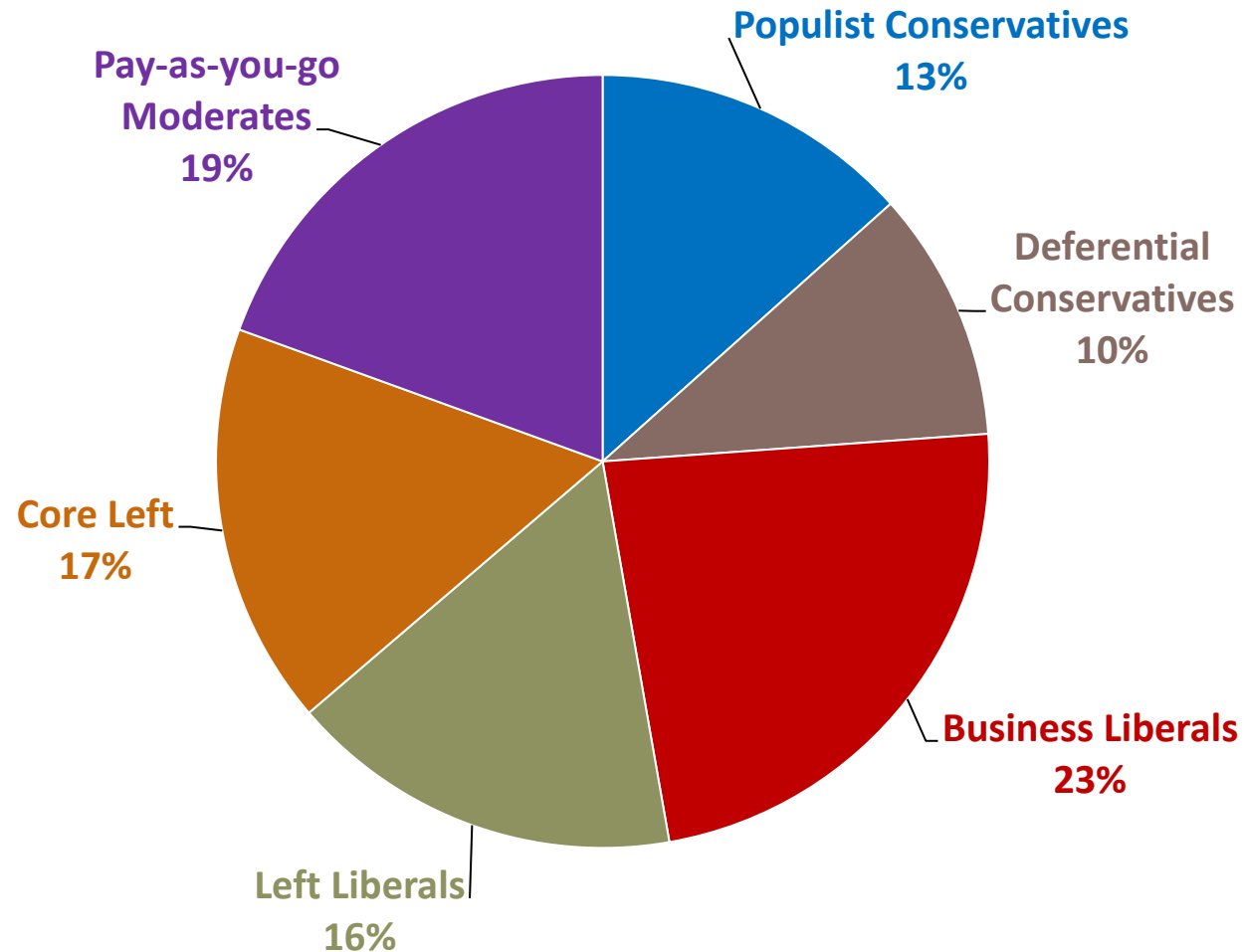


# Value Clusters: Business Liberals (23%) are the highest value cluster, followed by Pay-as-you-go at 19%



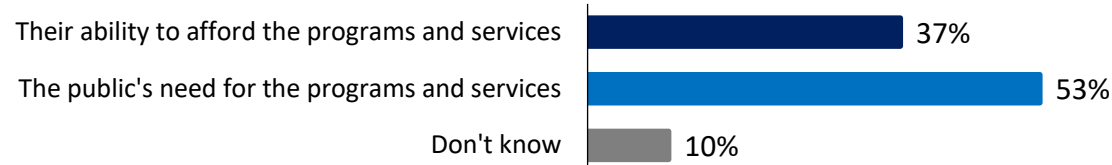
Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

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

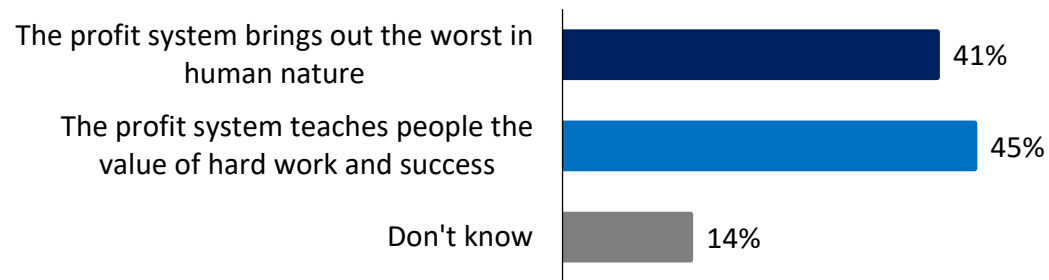


# Core Political Values: Nearly 2-in-3 believe the main role of the government is to create equal opportunity

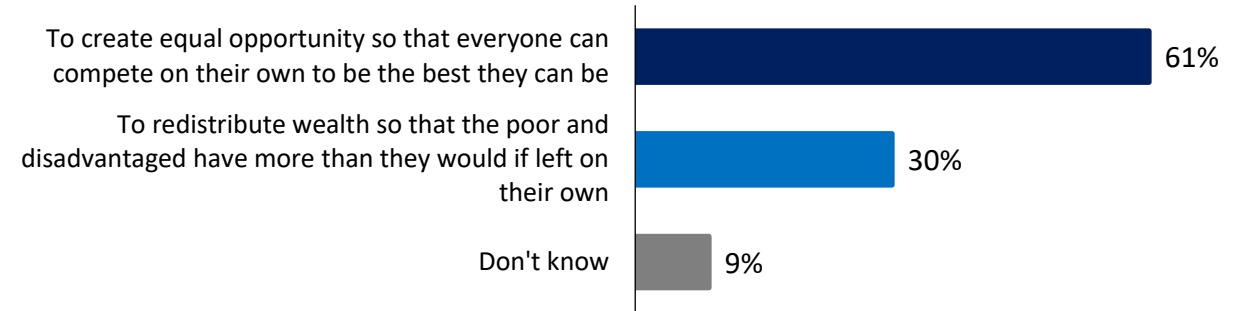
**Q** When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?  
[asked of all respondents; n=2,000]



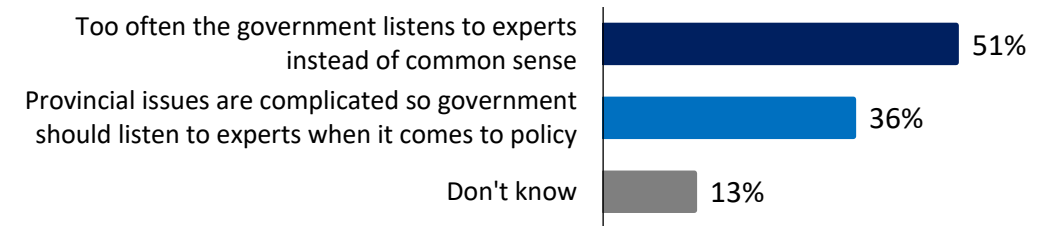
**Q** Which of the following statements comes closest to your view?  
[asked of all respondents; n= 2,000]



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



**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]



# 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

# Federal Vote



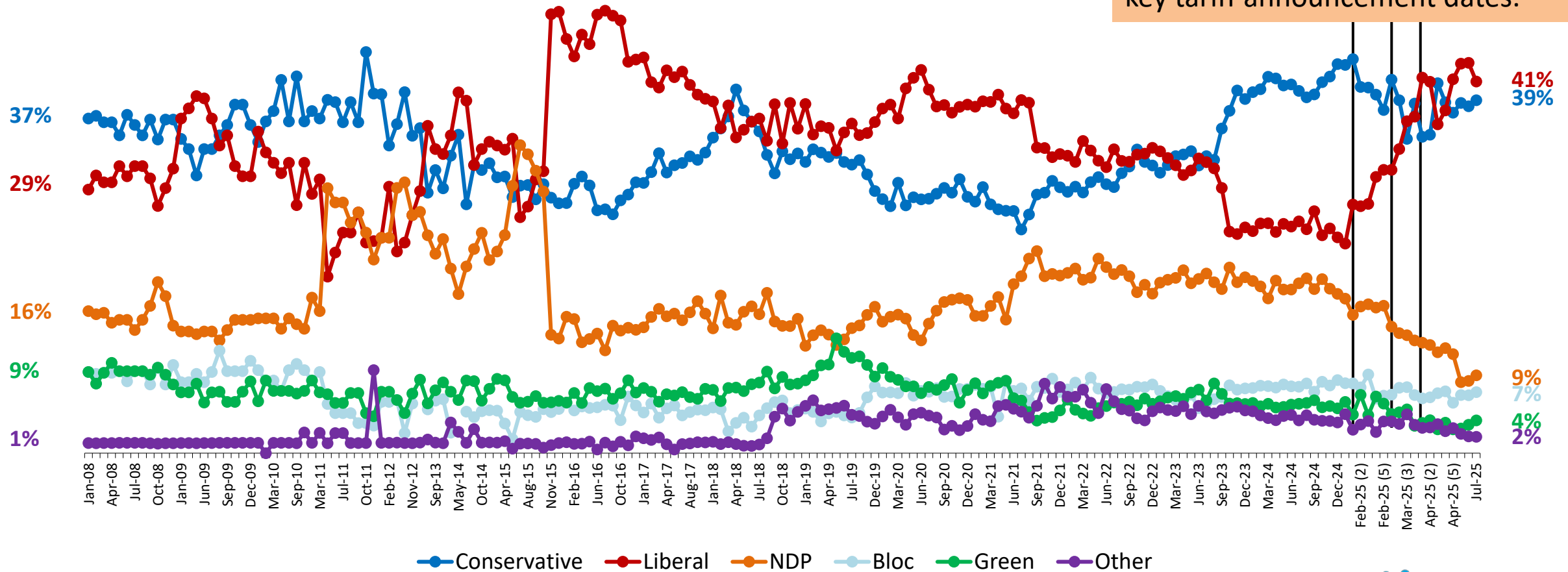
# Federal Decided Vote Tracking: Liberals hold a marginal lead over conservatives, narrowing it from 5-point in June to 2-point in July



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 of those who only decided voters; n=1,786]

Feb 1<sup>st</sup>, March 4<sup>th</sup> and April 2<sup>nd</sup> are key tariff announcement dates.



# Decided Vote by REGION: Conservative support is highest in AB and Prairies; QC leads Liberal; Atlantic, BC and ON are statistically tied

Decided vote by REGION

		REGION					
		BC	AB	Prairies	ON	QC	Atlantic
		(N=247)	(N=206)	(N=116)	(N=699)	(N=410)	(N=107)
Decided Vote	Conservative	40%	55%	49%	42%	21%	38%
	Liberal	38%	29%	32%	45%	41%	49%
	NDP	12%	11%	16%	8%	5%	9%
	Bloc	0%	0%	0%	0%	29%	0%
	Green	7%	2%	2%	4%	2%	2%
	Other	2%	3%	1%	1%	2%	2%

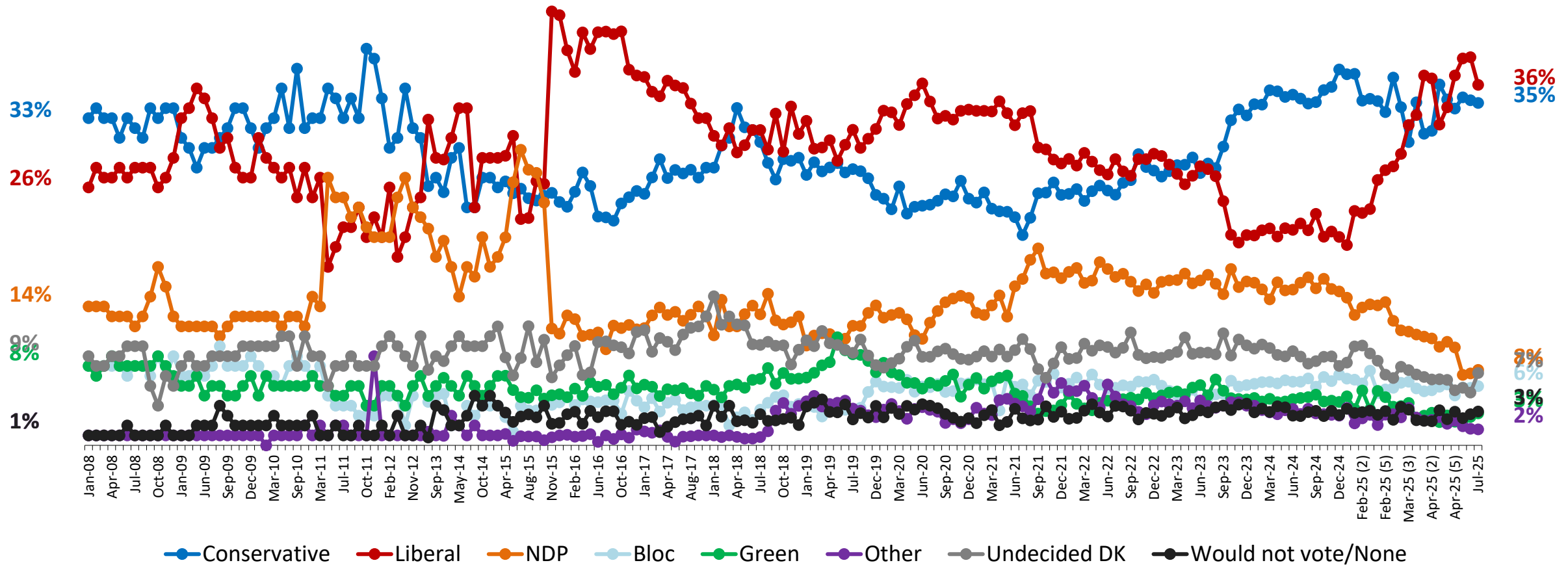
Note: Current data: July 2025

# Federal Vote Tracking: Liberals fall 3 points and are now in a close race with the Conservatives



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=2,000]

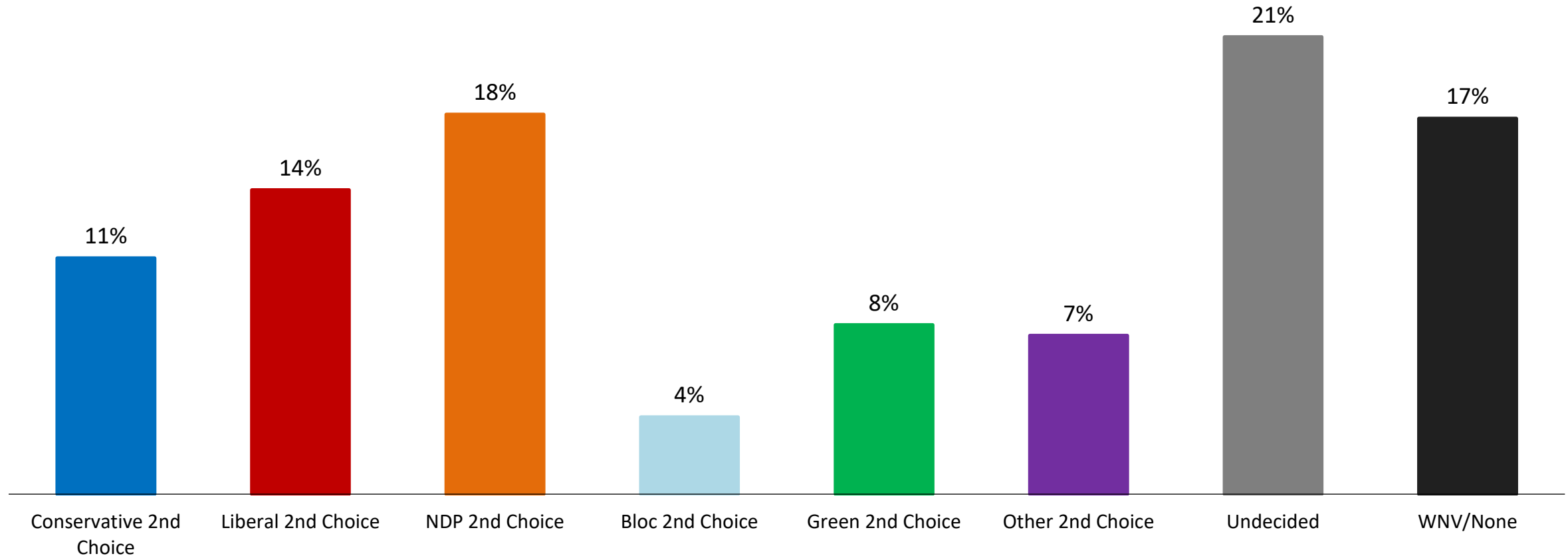


# Federal 2nd Choice Party: NDP is in the lead as the second vote choice at 18%, followed by Liberals at 14%; 1-in-5 is undecided



And which party would be your second choice?

[asked of those who only decided voters; n=1,786]



# Federal 2nd Choice Party: 32% of Liberal and 42% of NDP supporters rank each other as their second choice

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

Second Choice	First Choice				
	Conservative 1st Choice	Liberal 1st Choice	NDP 1st Choice	Bloc 1st Choice	Green 1st Choice
	(N=691)	(N=727)	(N=152)	(N=119)	(N=64)
	Conservative 2nd Choice	20%	13%	12%	12%
	Liberal 2nd Choice	19%	42%	30%	29%
	NDP 2nd Choice	7%	32%	12%	16%
	Bloc 2nd Choice	3%	3%		3%
	Green 2nd Choice	5%	17%	7%	0%
	Other 2nd Choice	13%	6%	3%	15%
Undecided		25%	12%	21%	18%
WNV/None		28%	8%	15%	6%

**Note:** 'Other' in Combined Vote not shown due to insufficient sample size.

Current data: July 2025

# Combined Vote by Value Cluster: Left Liberals and Differential Conservatives are divided between Liberals and Conservatives

		Value Clusters					
		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
		(N=268)	(N=210)	(N=467)	(N=330)	(N=336)	(N=389)
Federal Combined Vote	Conservative	65%	41%	30%	33%	17%	33%
	Liberal	20%	37%	48%	36%	43%	28%
	NDP	3%	3%	5%	8%	18%	7%
	Bloc	3%	9%	7%	4%	6%	7%
	Green	2%	2%	3%	3%	4%	3%
	Other	2%	1%	2%	1%	1%	3%
	Undecided DK	5%	5%	4%	10%	7%	13%
	Would not vote/None	1%	2%	2%	5%	4%	7%

Note: Current data: July 2025

# Combined Vote by Gender and Age: Men are split between Liberals and Conservatives; those aged 55+ are more likely to be Liberal

Gender and Age

Federal Combined Vote	Men	Women	18-34	35-54	55+
	(N=971)	(N=1019)	(N=533)	(N=651)	(N=816)
Conservative	38%	31%	33%	37%	34%
Liberal	37%	36%	35%	30%	42%
NDP	6%	8%	10%	9%	5%
Bloc	6%	6%	5%	6%	7%
Green	4%	3%	4%	4%	2%
Other	2%	2%	2%	2%	1%
Undecided DK	5%	9%	9%	8%	6%
Would not vote/None	2%	4%	3%	4%	3%

Note: Current data: July 2025



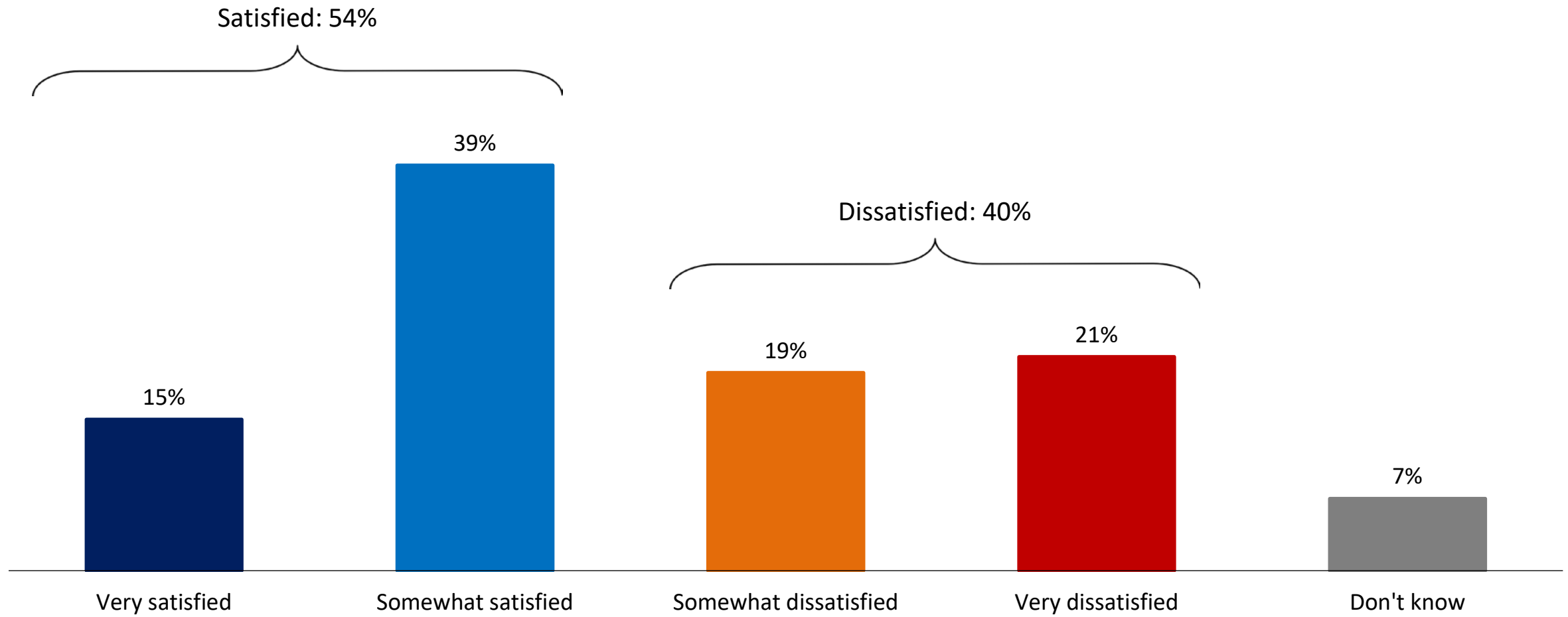
# **Federal Government Approval**

# Federal Satisfaction: Over half are satisfied with the performance of the federal government in Canada while 40% are dissatisfied



Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada? Would you say you are...?

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

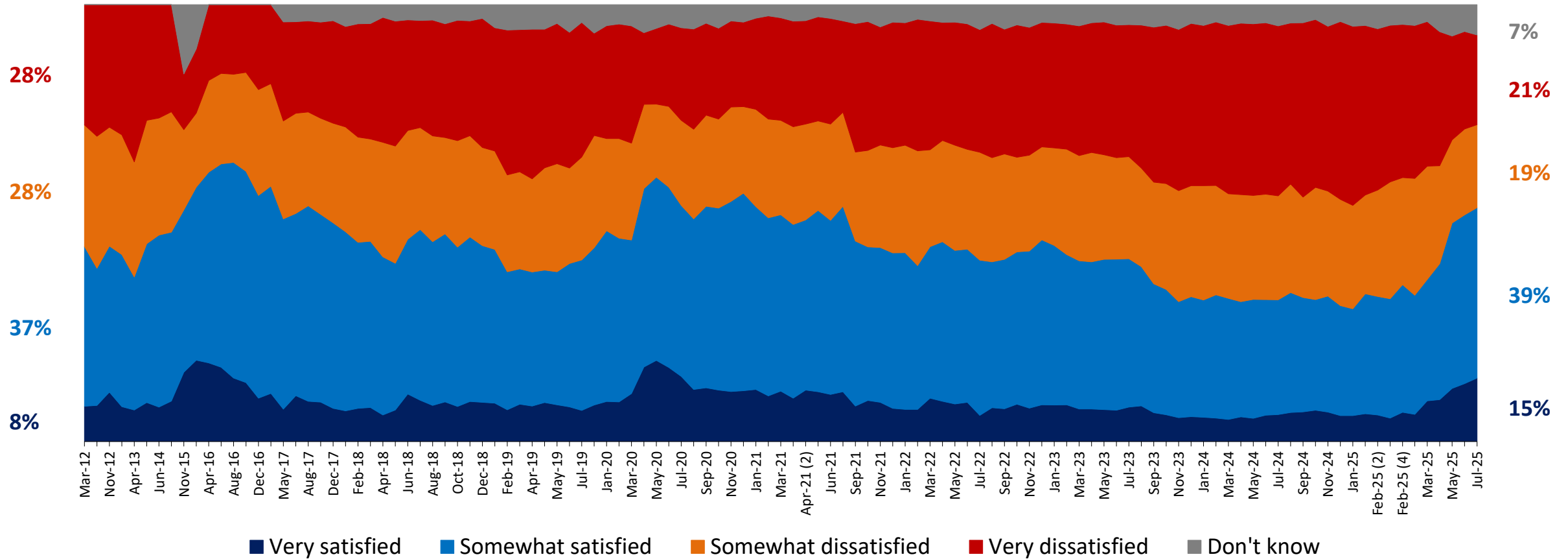


# Federal Satisfaction Tracking: Satisfaction has been steadily increasing since the end of February, now at 54%, a 13-point increase since March



Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada? Would you say you are...?

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

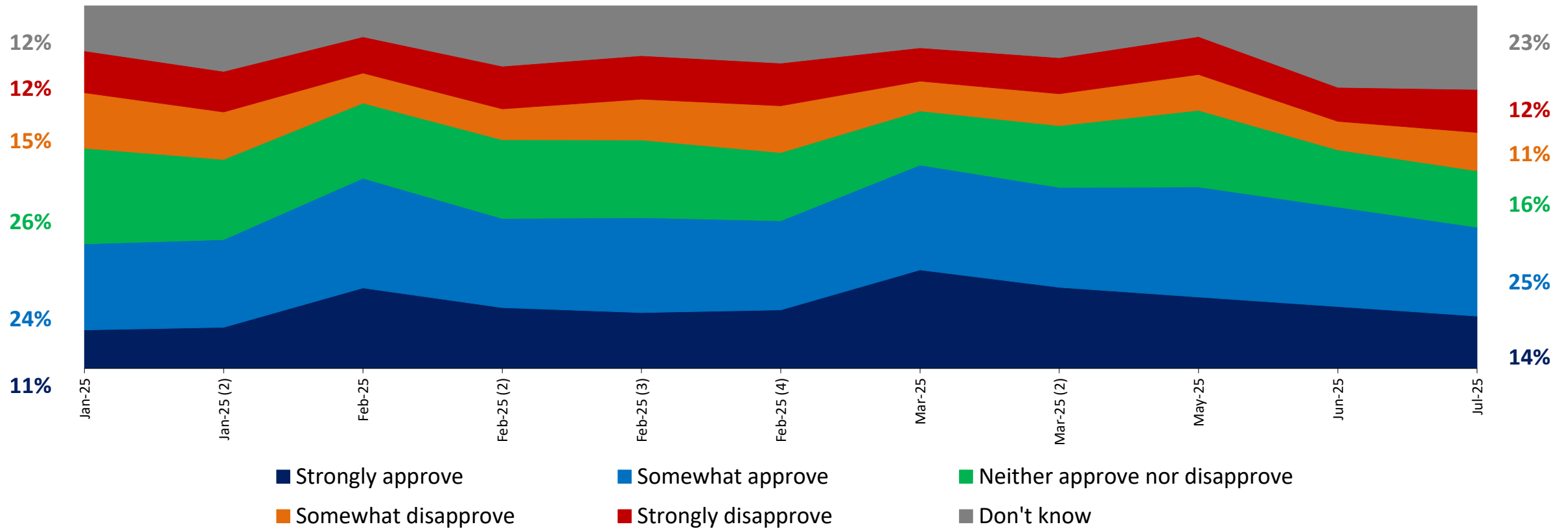


# Federal Government's Approval: Approval further drops 5% since the end of June, now at 39% with 23% unsure



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]



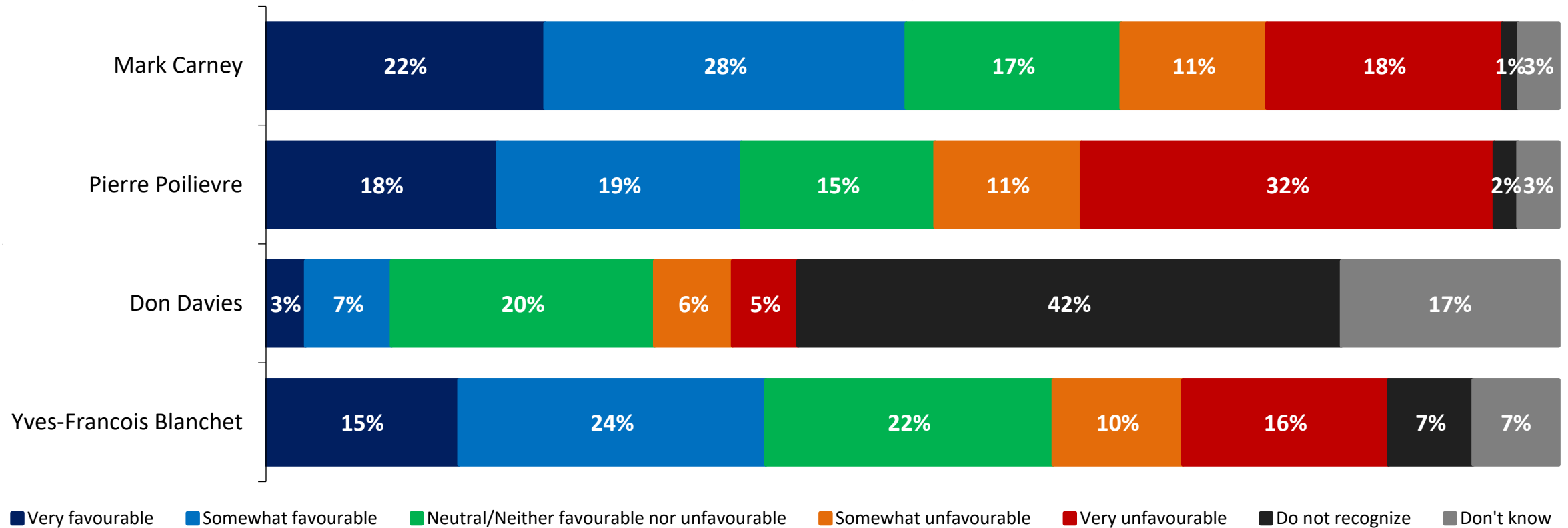
# Leadership

# Leader Favourables: Carney leads at 50% favourability, followed by Blanchet at 39%, and Poilievre at 37%



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=2,000]

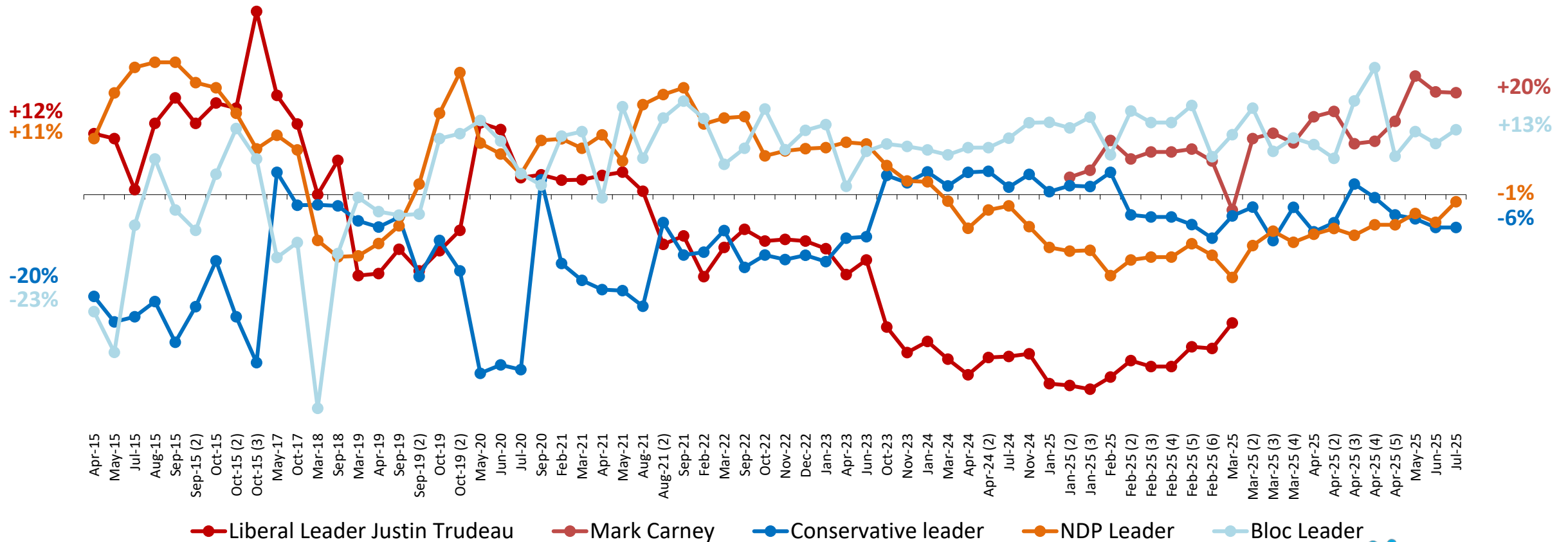


# Party Leader NET Favourables Tracking: All leader tracking remains steady since beginning of June; Carney leads Blanchet by 7 points



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=2,000]



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

Current data: July 2025

Note: Results for Yves-Francois Blanchet for Quebec respondents only

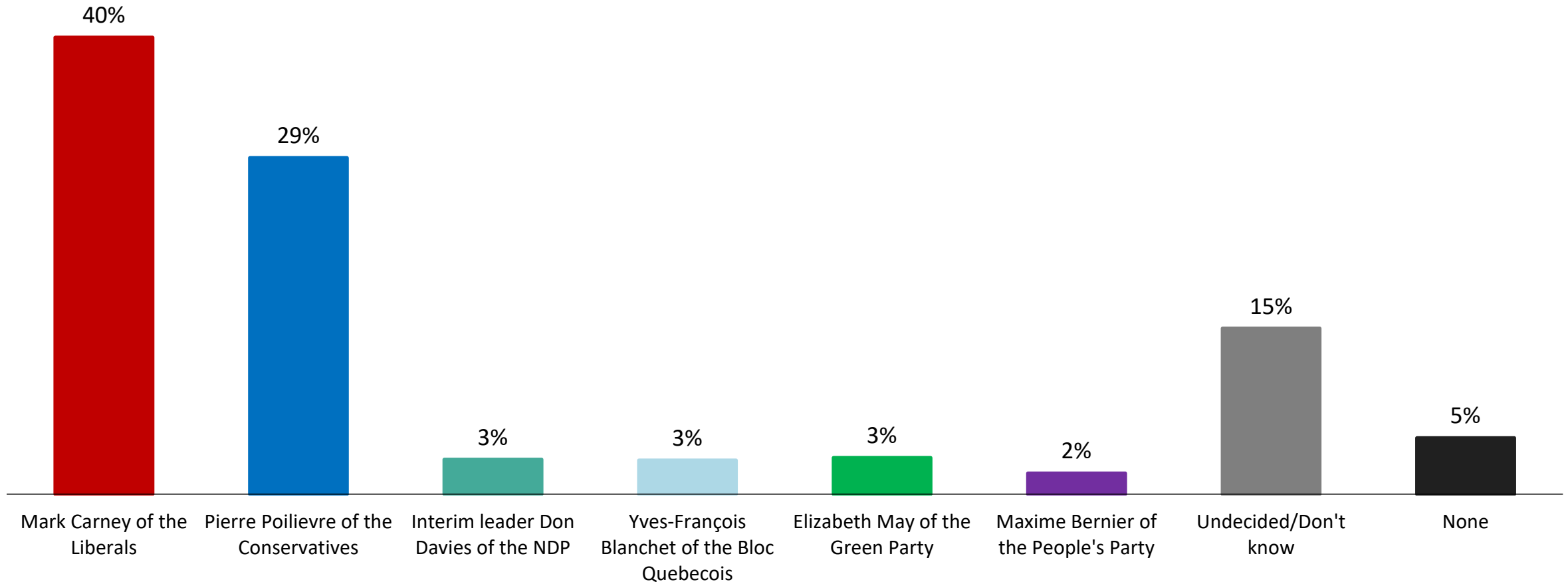


# Best Prime Minister: Mark Carney viewed as best option for PM by 40% of respondents; Poilievre follows at 29%



Which of the following party leaders would make the best Prime Minister of Canada?

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

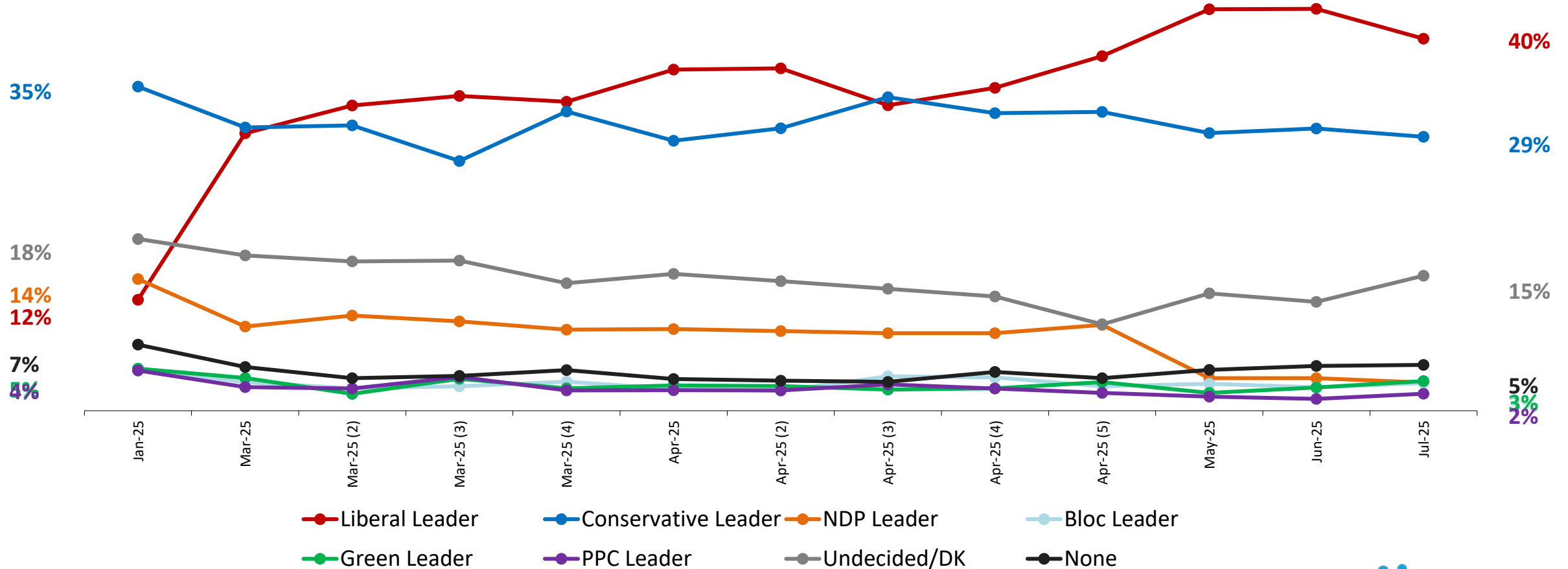


# Best Prime Minister Tracking (Raw): Carney sees a slight decline since June but still lead the Polievre by 11 points



Which of the following party leaders would make the best Prime Minister of Canada?

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

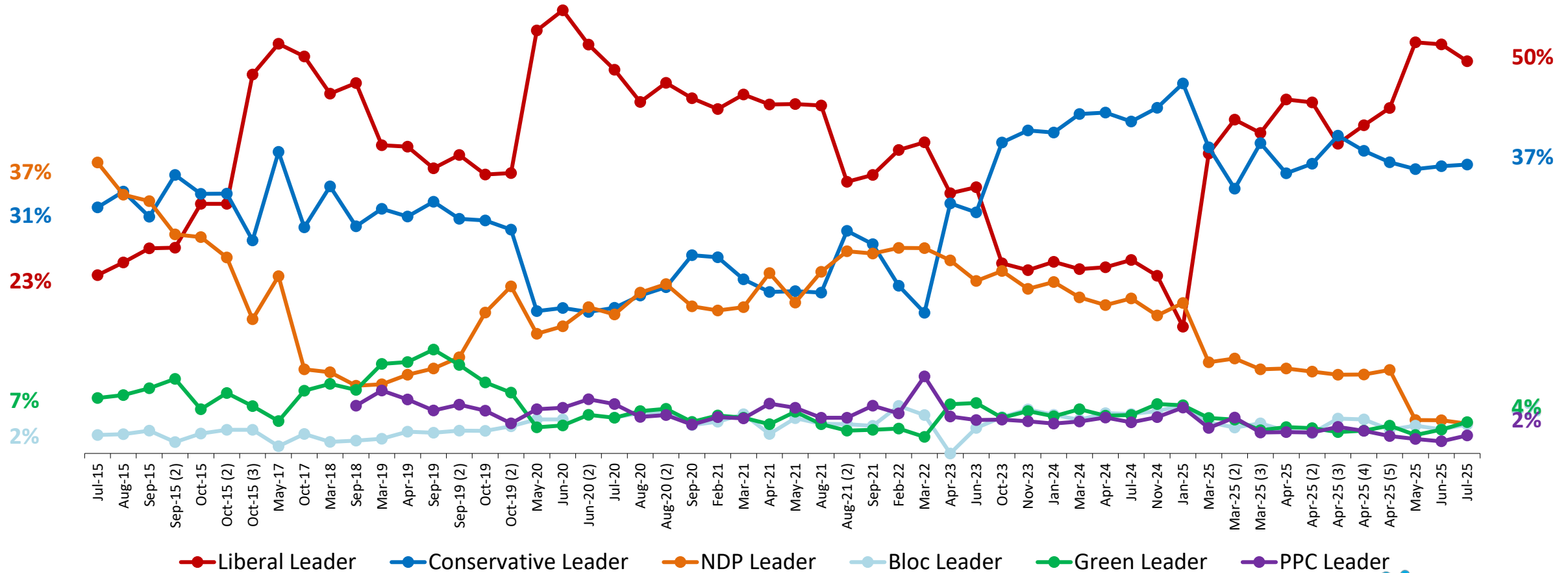


# Best Prime Minister Tracking (Decided): Half of all decided voters (50%) believe that Carney makes the best PM



Which of the following party leaders would make the best Prime Minister of Canada?

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



# Best Prime Minister by Party ID: 83% of Liberal voters believe that Carney is the best PM

		Federal Party Identification					
		Conservative	Liberal	NDP	Bloc	Other	Unaligned
		(N=626)	(N=592)	(N=170)	(N=116)	(N=112)	(N=384)
Best Prime Minister	Liberal Leader	13%	83%	43%	26%	19%	27%
	Conservative Leader	75%	6%	5%	13%	16%	11%
	NDP Leader	1%	1%	25%	1%	3%	1%
	Bloc Leader	1%	0%	1%	39%	3%	1%
	Green Leader	0%	2%	4%	0%	32%	2%
	PPC Leader	2%	1%	0%	1%	9%	2%
	Undecided/DK	6%	6%	17%	15%	11%	42%
None	3%	1%	4%	5%	7%	15%	

Note: Current data: July 2025

# Best Prime Minister by Quebec vs Rest of Canada: Mark Carney seen as best option for PM in QC and ROC, leads Poilievre by 26% in QC

Quebec vs Rest of Canada

Best Prime Minister

	Quebec	Rest of Canada
	(N=460)	(N=1540)
<b>Liberal Leader</b>	43%	39%
<b>Conservative Leader</b>	17%	33%
<b>NDP Leader</b>	2%	3%
<b>Bloc Leader</b>	13%	0%
<b>Green Leader</b>	2%	4%
<b>PPC Leader</b>	2%	2%
<b>Undecided/DK</b>	14%	15%
<b>None</b>	7%	4%

**Note:** Current data: July 2025

# Best Prime Minister by Region: Carney outpaces Poilievre for best option for PM in all regions except AB and Prairies

		Region					
		BC	AB	Prairies	ON	QC	Atlantic
		(N=280)	(N=224)	(N=130)	(N=772)	(N=460)	(N=134)
Best Prime Minister	Liberal Leader	43%	31%	34%	41%	43%	41%
	Conservative Leader	25%	44%	39%	32%	17%	31%
	NDP Leader	5%	2%	3%	3%	2%	3%
	Bloc Leader	0%	0%	0%	0%	13%	0%
	Green Leader	5%	2%	3%	4%	2%	2%
	PPC Leader	2%	4%	0%	2%	2%	0%
	Undecided/DK	14%	12%	16%	15%	14%	17%
	None	5%	5%	6%	4%	7%	5%

Note: Current data: July 2025

# Best Prime Minister by Age: Carney leads age groups 35+, groups 18-34 seen as a battleground

Best Prime Minister	Age		
	18-34	35-54	55+
	(N=533)	(N=651)	(N=816)
Liberal Leader	32%	35%	49%
Conservative Leader	31%	31%	27%
NDP Leader	5%	4%	1%
Bloc Leader	3%	2%	4%
Green Leader	5%	4%	2%
PPC Leader	3%	2%	1%
Undecided/DK	17%	15%	12%
None	4%	7%	4%

Note: Current data: July 2025

# Best Prime Minister by Gender: Poilievre trails Carney for best PM among both men and women respondents

Best Prime Minister	Gender	
	Men	Women
	(N=971)	(N=1019)
	40%	40%
	33%	26%
	3%	3%
	3%	3%
	3%	3%
	2%	2%
	12%	17%
	4%	6%

**Note:** Current data: July 2025



# Best Prime Minister by Values Clusters: Carney seen as best PM option across all value clusters except Populist Conservatives

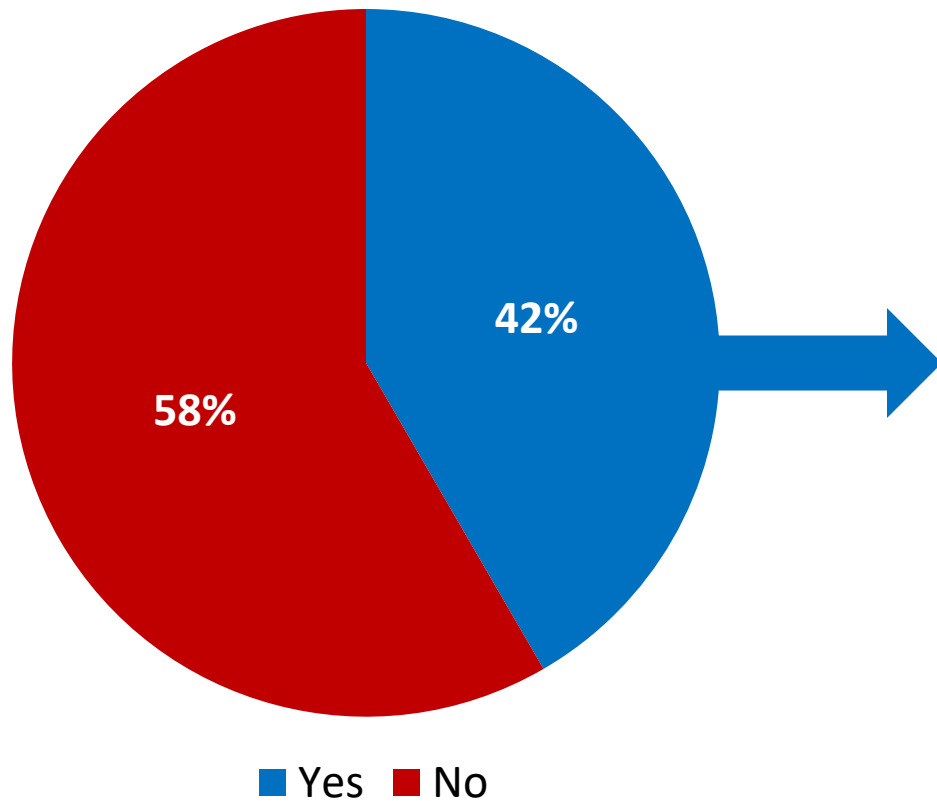
		Values Clusters					
		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
		(N=268)	(N=210)	(N=467)	(N=330)	(N=336)	(N=389)
Best Prime Minister	Liberal Leader	23%	46%	51%	38%	47%	31%
	Conservative Leader	56%	32%	27%	29%	14%	26%
	NDP Leader	1%	1%	2%	3%	6%	4%
	Bloc Leader	1%	3%	3%	2%	5%	4%
	Green Leader	2%	2%	3%	3%	5%	4%
	PPC Leader	2%	1%	2%	1%	1%	2%
	Undecided/DK	12%	10%	8%	17%	16%	23%
	None	3%	5%	3%	7%	6%	7%

Note: Current data: July 2025

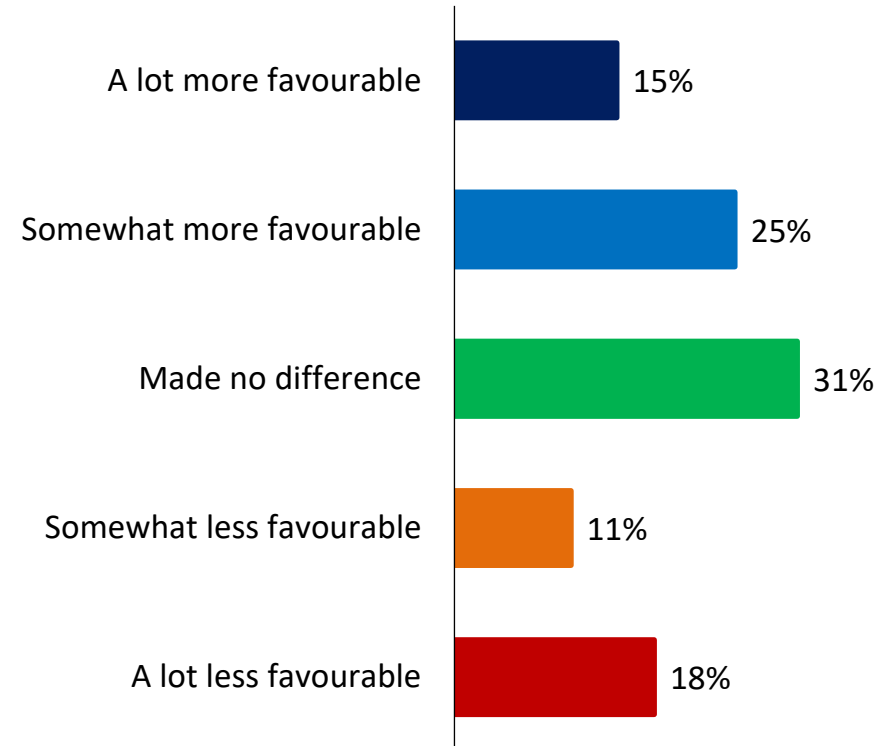
# **PM's Read, Seen, Heard**

# 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]



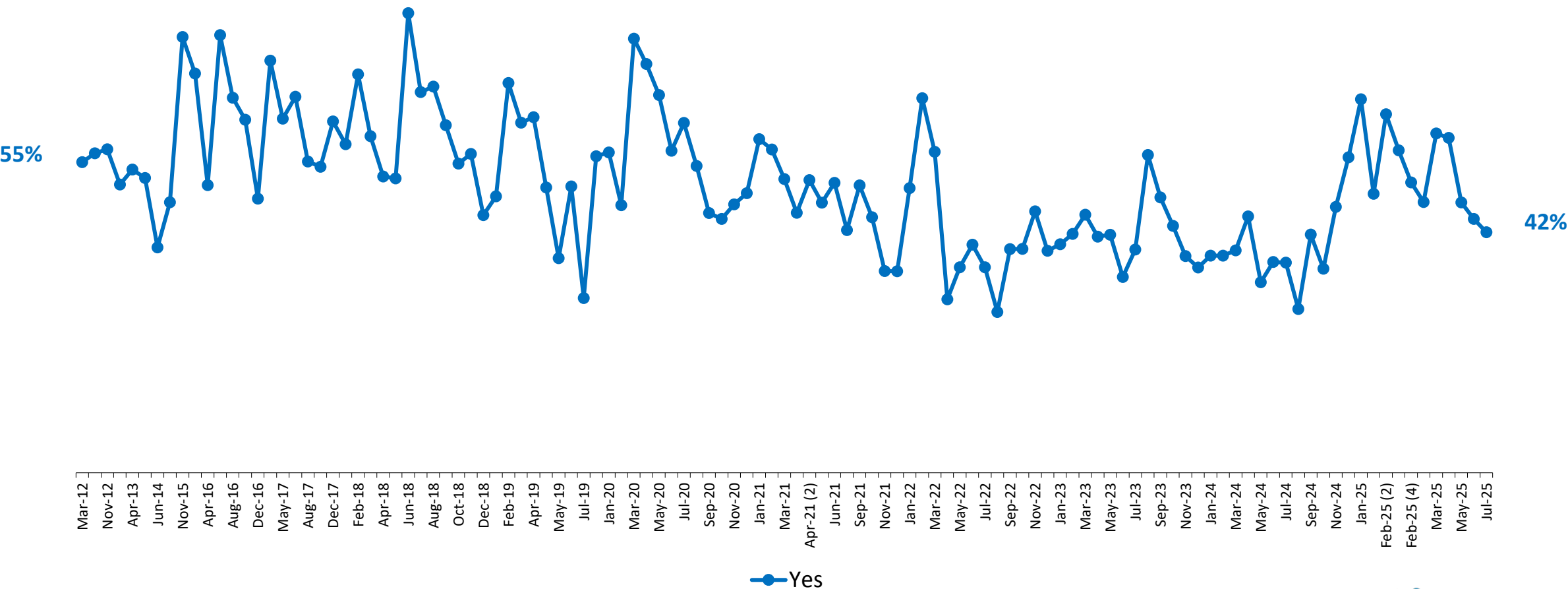
**Q** Did what you read, see or hear leave you feeling a lot more favourable, somewhat more favourable, somewhat less favourable or a lot less favourable towards Canada's Prime Minister and the Federal government?  
[asked of those who have RSH; n=849]



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



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]

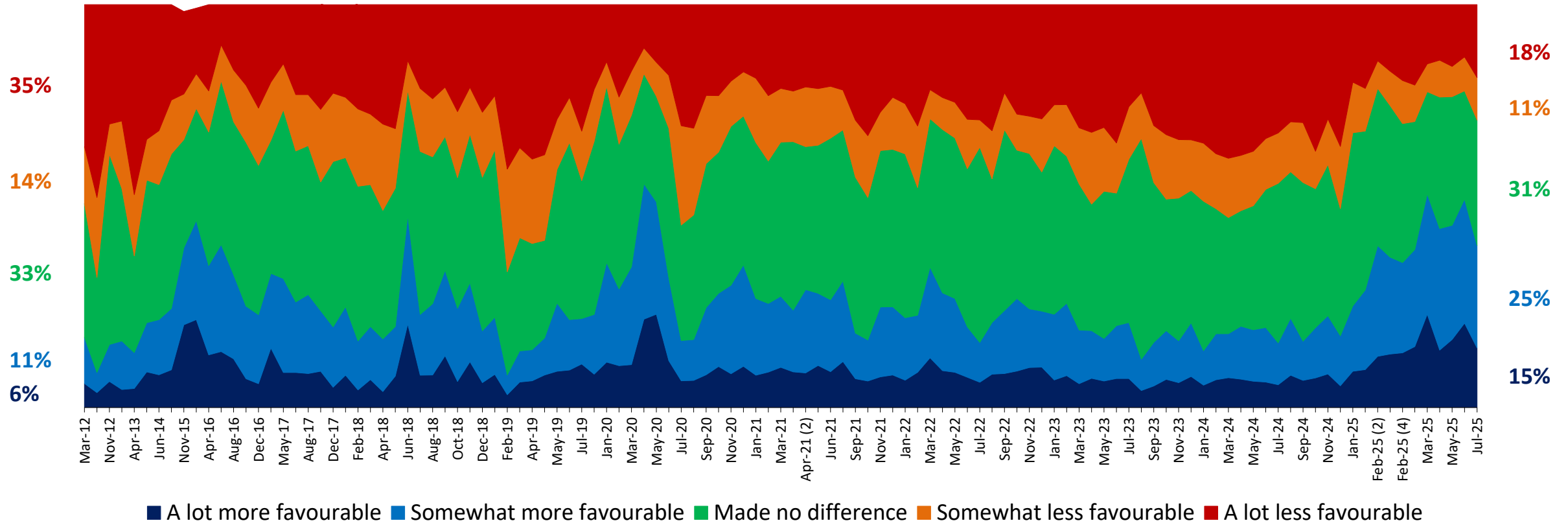


# Federal Read, Seen, Heard, Impact Tracking: Net favourability is 19 points lower than in June and at 12% is close to February levels



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]



# Impact of RSH on PM and Federal Government:

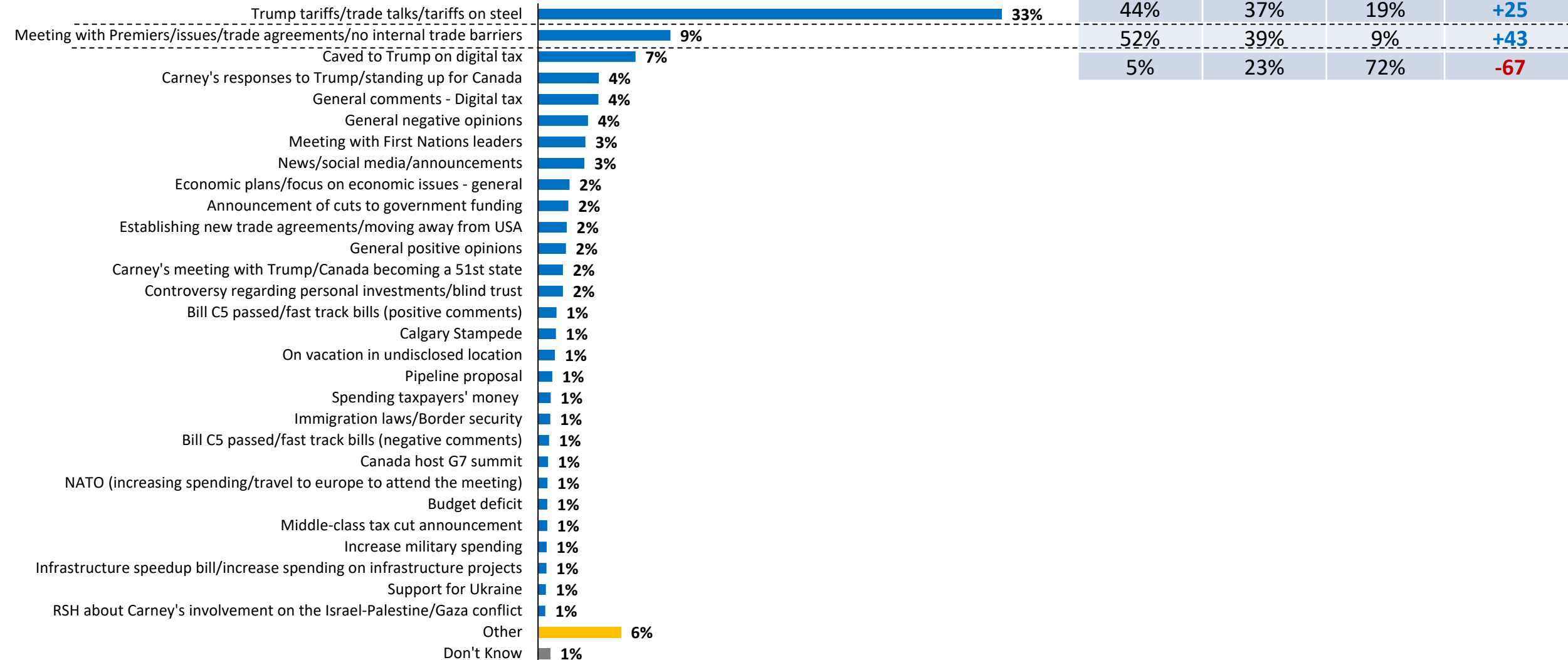
**Trump Tariffs and Carney's meeting with premiers are strongly driving favourability, while caving to Trump on digital tax drew more unfavourable reactions**



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]

## Impact by RSH



**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**



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."*

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

Top RSH words are Tariffs, Trump, Tax and Trade



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]

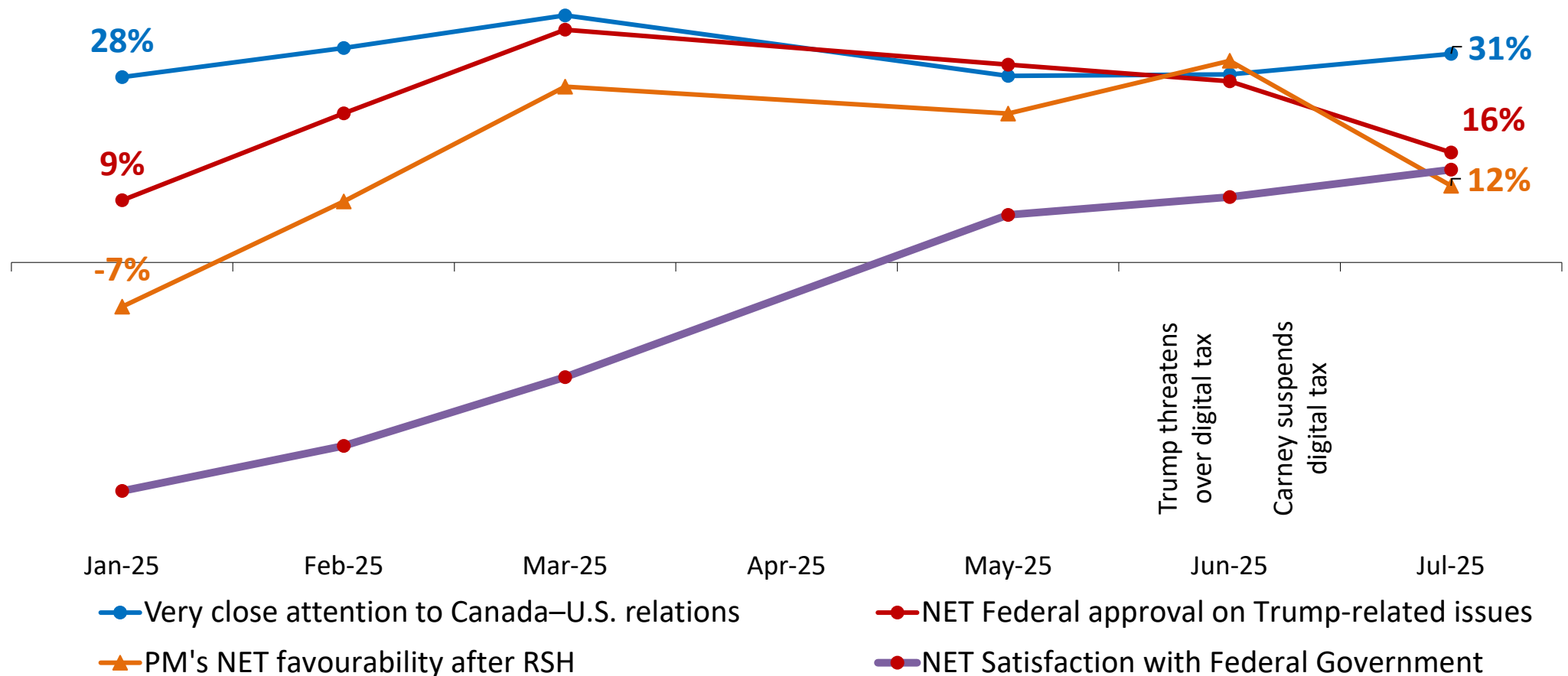




# Canada-U.S. Trade Narrative: High awareness does not translate into increased support for the governments and PM's handling of Trump



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



# 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%

For more information, please contact:

**Greg Lyle**

President

(t) 416-642-6429

(e) [glyle@innovativeresearch.ca](mailto:glyle@innovativeresearch.ca)

**Jia He**

Research Analyst

**Mesgna Mesgna**

Research Analyst

**Natalia Zuluaga**

Intern

**Marina Mandic**

Manager, Omnibus Research Services

**Building Understanding.**

