



# Canada This Month Pre-Budget

Public Opinion Research  
Release Date: October 29th  
Field Dates: October 16, 2025 to October 27, 2025

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# Study Overview



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

- **Federal Vote, RSH, Leadership, Reaction to Trump**
- **Expected impact of the Nov 4<sup>th</sup> Federal Budget**
- **Government spending**
- **Spending priorities**

# Key Findings

1

**A majority (54%) favour reducing spending and paying down the national debt**, vs 30% who want an increase in spending to provide for better services. Only 45% support more social spending when trade-offs are explicit (issues like health care, poverty and homelessness)

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2

**Pre-budget awareness and outlook remain low and wary**, with only 29% recalling hearing about the upcoming budget, and 37% expecting it will have a direct impact on them personally. This perceived personal impact is sharply negative, with the NET impact score of -44. 36% are uncertain of its impact.

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3

**When priorities are explicit, as in paired-choice testing, health care funding outranks housing, deficit control**, and budget balance as the top spending priority. Defence is at the bottom of the priority list.

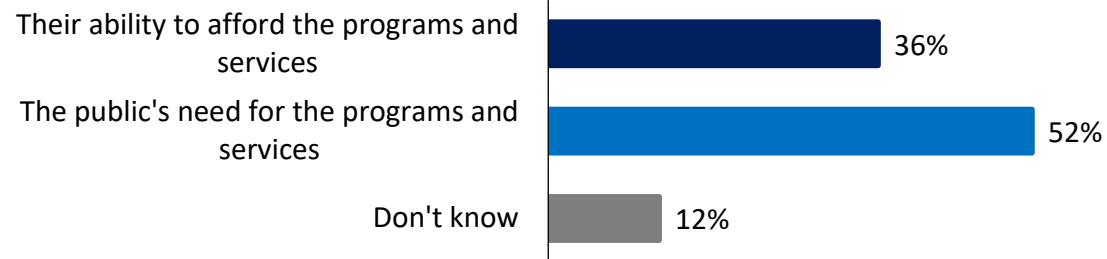
# Segmentations

# Value Clusters

# Core Political Values: Nearly 3-in-5 think the main role of govt is to create equal opportunity, and 52% think spending should be needs-based

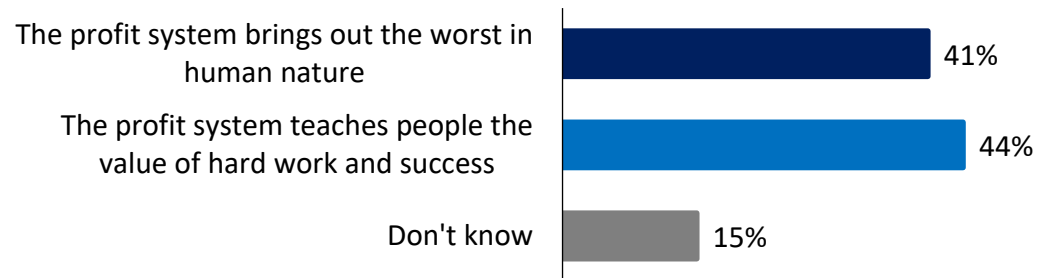
**Q** When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?

[asked of all respondents; n=2500]



**Q** Which of the following statements comes closest to your view?

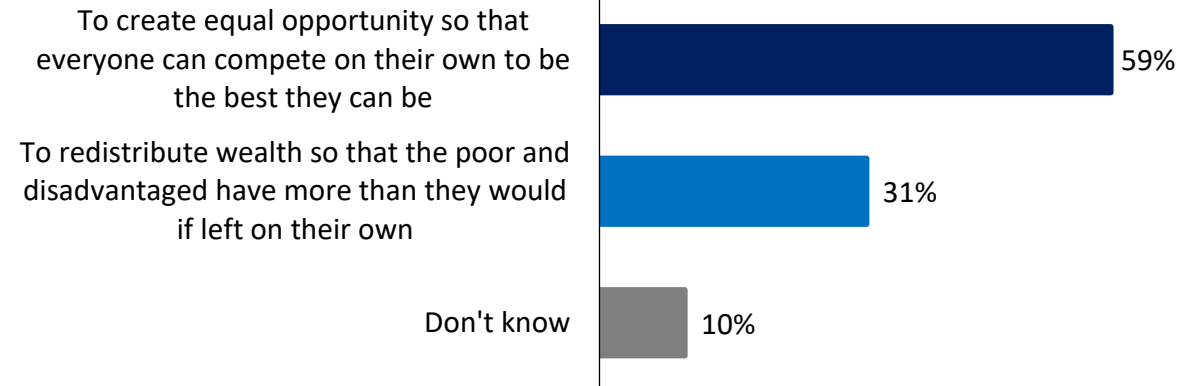
[asked of all respondents; n=2500]



Current data: October 2025

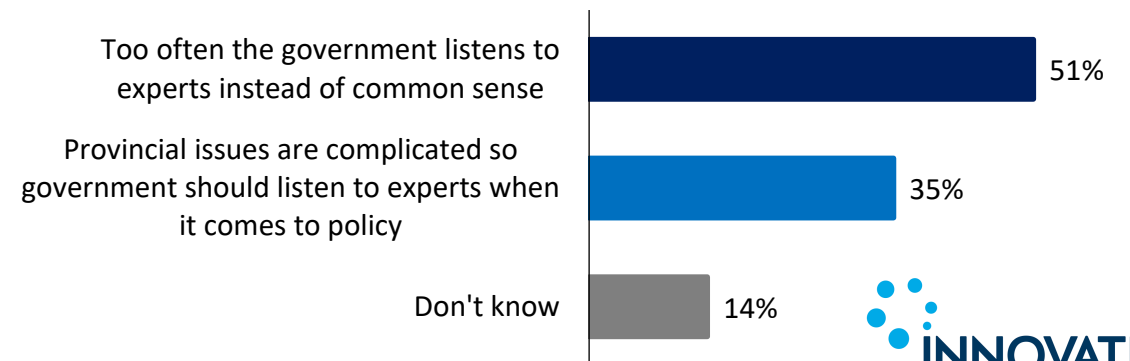
**Q** Is the main role of government to...?

[asked of all respondents; n=2500]



**Q** When it comes to government decision making, which of the following statements is closest to your view?

[asked of all respondents; n=2500]

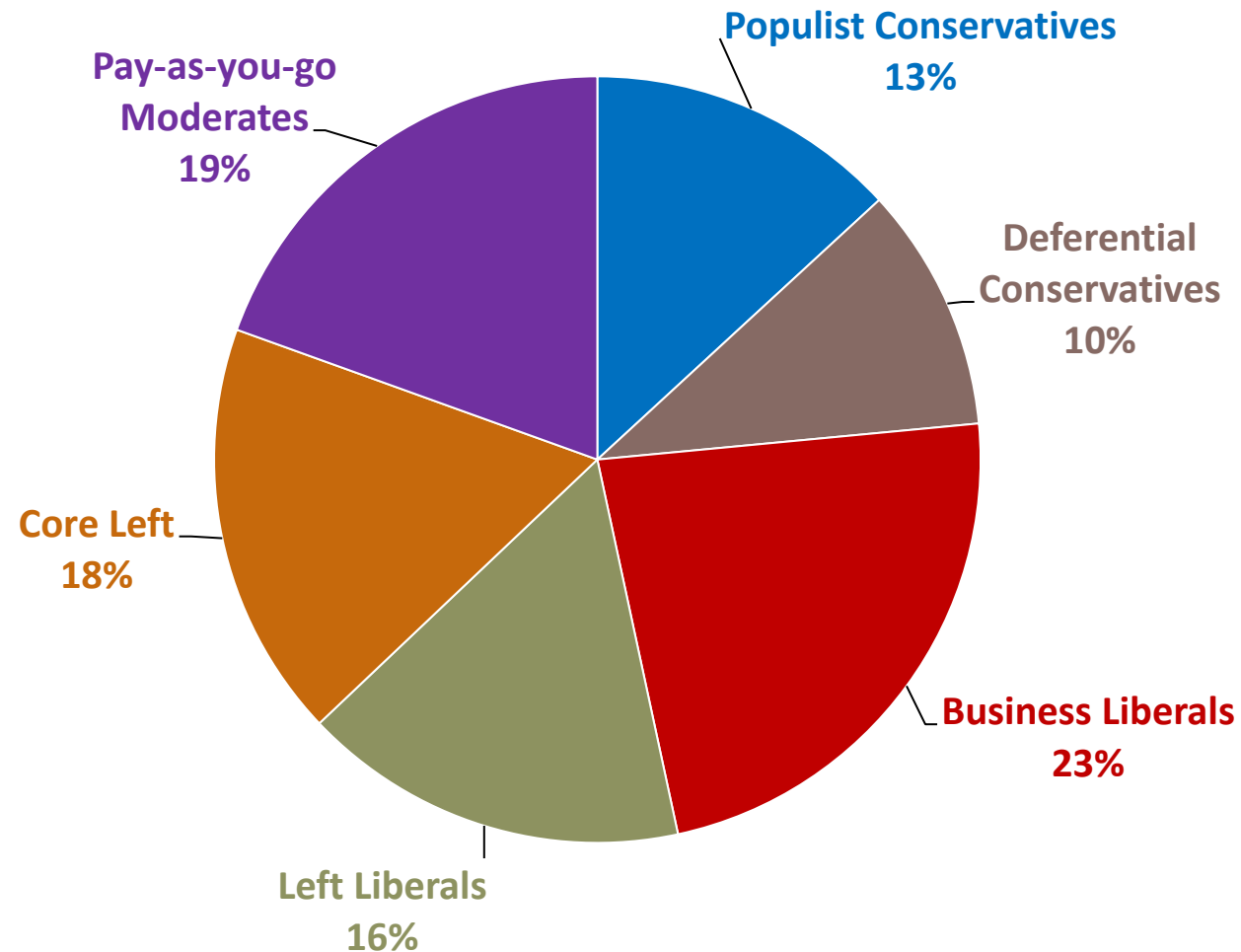


# Value Clusters: Nearly 1-in-4 Canadians are Business Liberals, while almost 1-in-5 are Pay-as-you-go Moderates



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=3,000]



# Defining Value Clusters: Business Liberals think spending should be needs-based, while Pay-as-you-go Moderates prioritize ability to afford

Core Political Values by Value Clusters

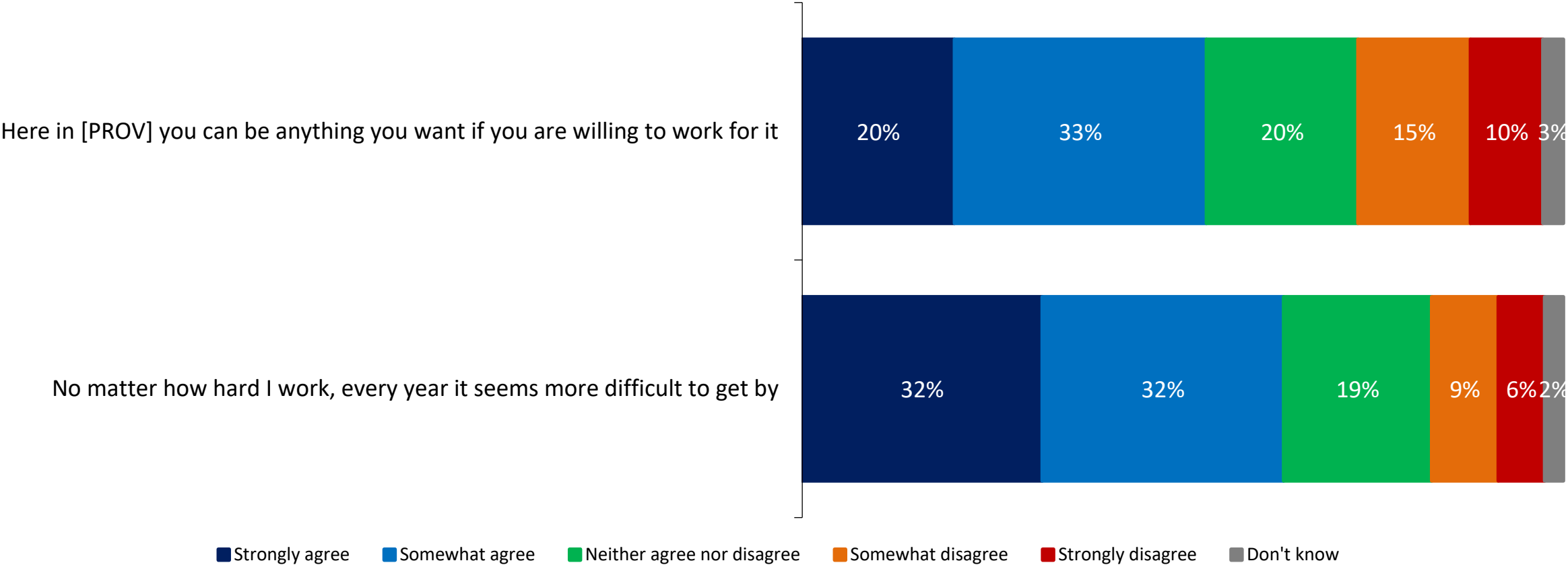
| Column %                                       |                                        | Populist Conservatives | Deferential Conservatives | Business Liberals | Left Liberals | Core Left | Pay-as-you-go Moderates |
|------------------------------------------------|----------------------------------------|------------------------|---------------------------|-------------------|---------------|-----------|-------------------------|
| Governments should base decisions on...        | Ability to afford                      | 94%                    | 90%                       | 0%                | 0%            | 0%        | 72%                     |
|                                                | Public Need                            | 0%                     | 0%                        | 95%               | 86%           | 92%       | 0%                      |
| Is the main role of government to...?          | Create equal opportunity               | 99%                    | 76%                       | 67%               | 97%           | 0%        | 36%                     |
|                                                | Redistribute wealth                    | 0%                     | 19%                       | 26%               | 0%            | 96%       | 32%                     |
| When it comes to government decision making... | Rely on common sense                   | 100%                   | 0%                        | 45%               | 58%           | 49%       | 50%                     |
|                                                | Listen to experts                      | 0%                     | 88%                       | 46%               | 26%           | 41%       | 20%                     |
| The profit system...                           | Brings out the worst in human nature   | 0%                     | 0%                        | 0%                | 83%           | 86%       | 61%                     |
|                                                | Teaches value of hard work and success | 92%                    | 94%                       | 92%               | 0%            | 0%        | 7%                      |

Note: Current data: October 2025

# Economic Gap

# Segmentation Attitudes: Over half (53%) say you can be anything you want; 64% say it is more difficult to get by every year

Q Do you agree or disagree with the following statements? -  
[asked of all respondents; n=2500]

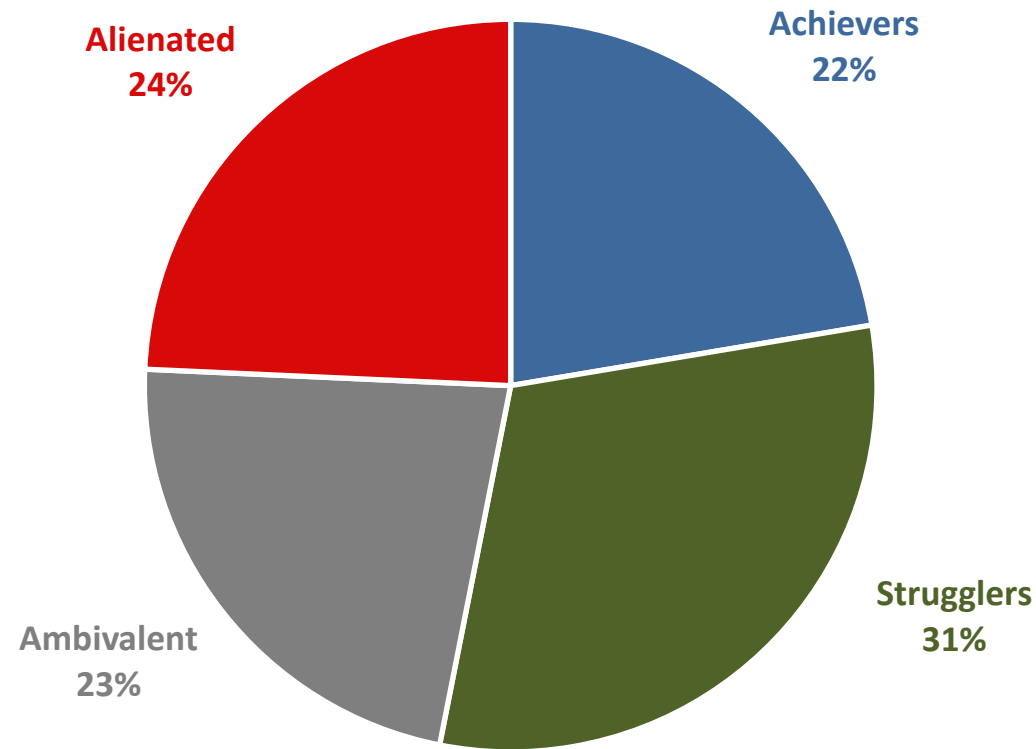


# Economic Gap Segmentation: Nearly 1-in-3 (31%) are strugglers, followed by alienated (24%)



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=3000]



# Decided Vote by Economic Gap: No statistically significant differences in Liberal and Conservative support across economic segments

|                      |              | Economic Gap |            |            |           |
|----------------------|--------------|--------------|------------|------------|-----------|
| Federal Decided Vote |              | Achievers    | Strugglers | Ambivalent | Alienated |
|                      |              | (N=520)      | (N=715)    | (N=449)    | (N=534)   |
|                      | Conservative | 41%          | 40%        | 38%        | 37%       |
|                      | Liberal      | 45%          | 37%        | 40%        | 40%       |
|                      | NDP          | 4%           | 7%         | 9%         | 14%       |
|                      | Bloc         | 6%           | 10%        | 7%         | 3%        |
|                      | Green        | 2%           | 3%         | 3%         | 3%        |
|                      | Other        | 1%           | 2%         | 4%         | 2%        |

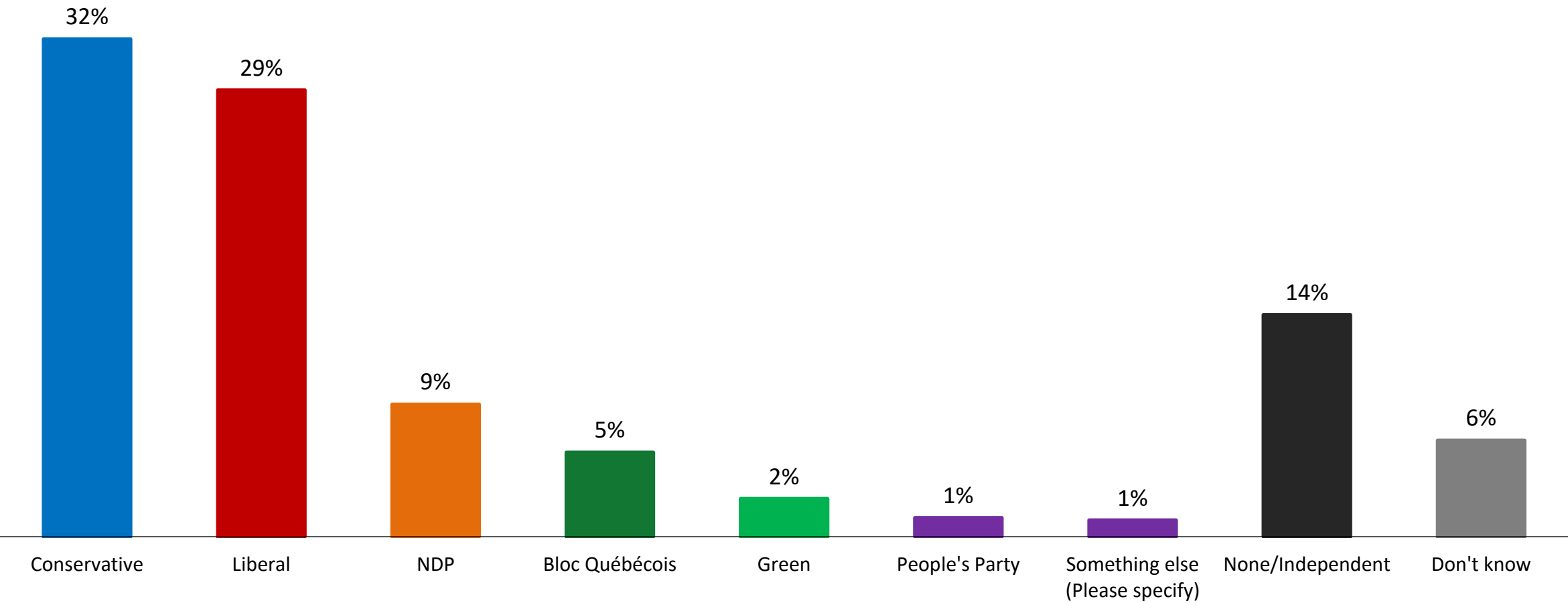
**Note:** Current data: October 2025

# Party ID

# Federal Party ID: Most Canadians identify as conservatives (32%) and liberals (29%)



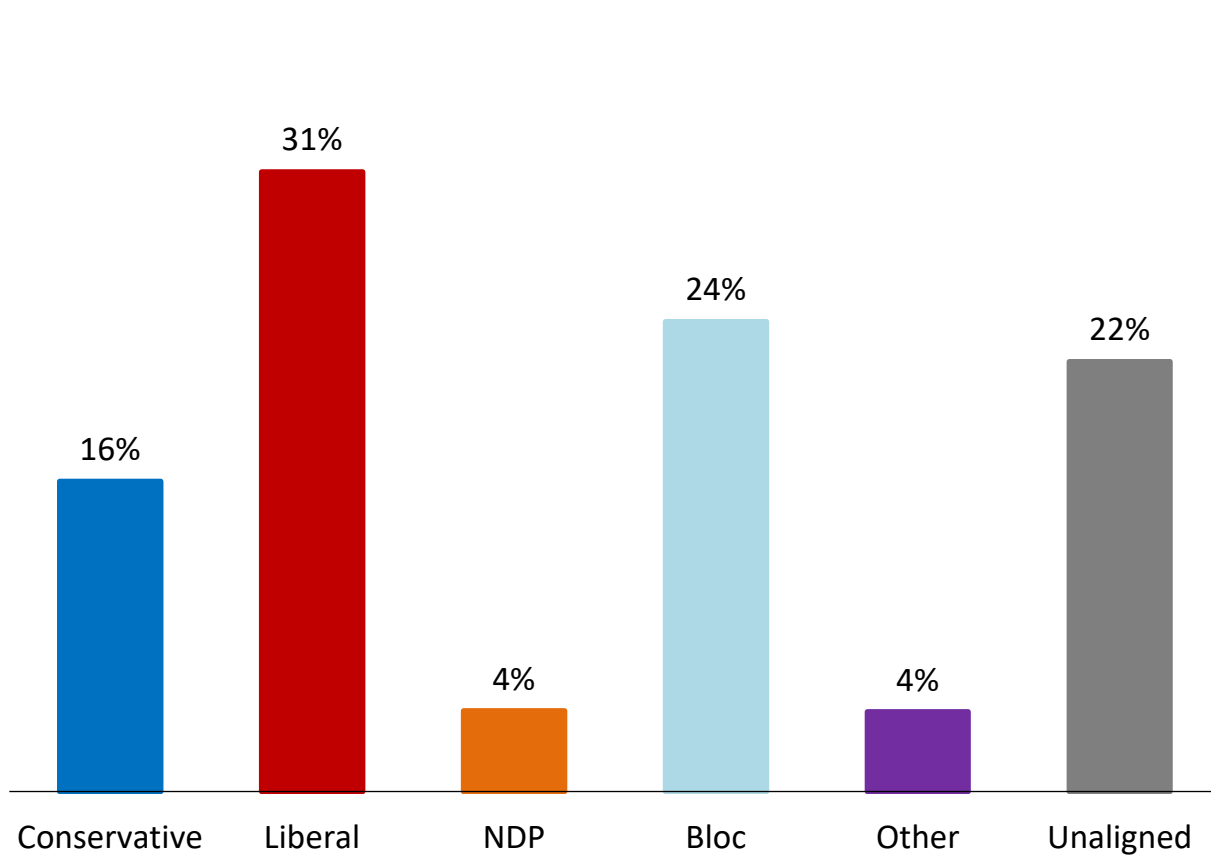
Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...  
[asked of all respondents; n=2500]



# Federal Party ID (QC vs. ROC): In QC more identify as liberals than Bloc (7-point lead); in the ROC more identify as conservatives than as liberals

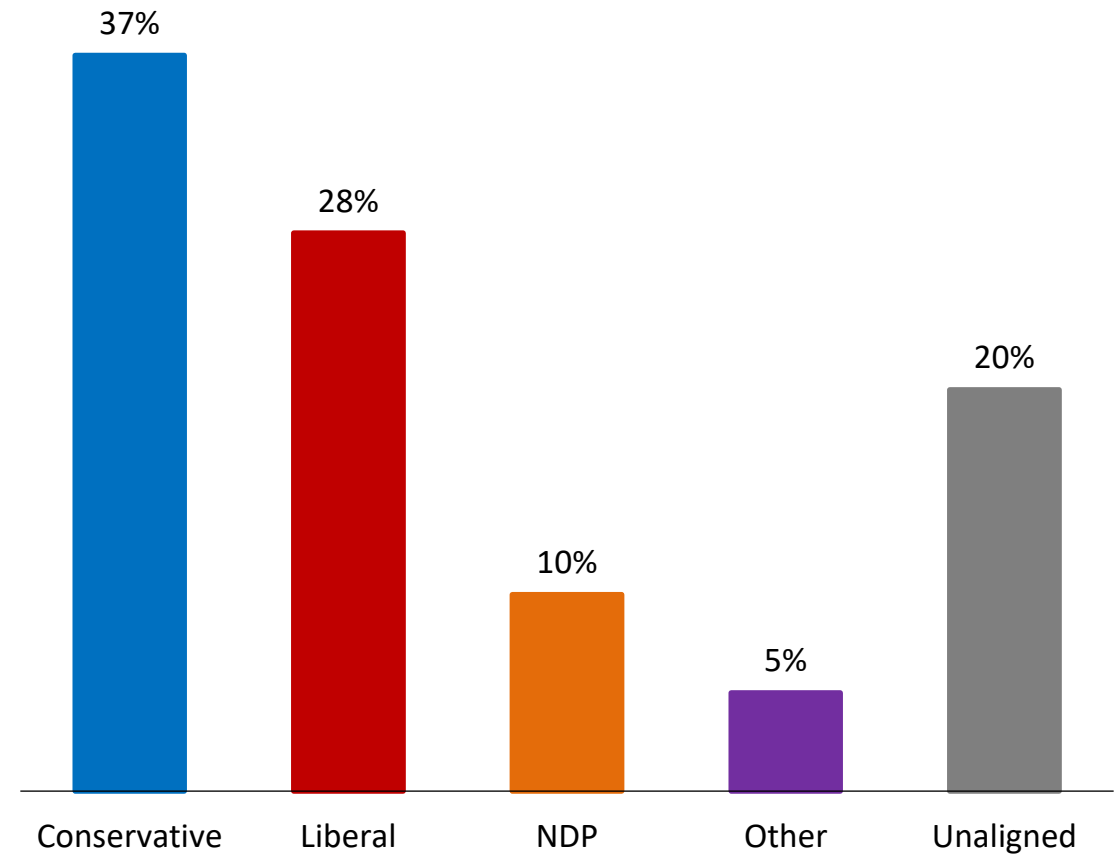
## Party ID: Quebec

[Respondents in Quebec; n=575]



## Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1925]



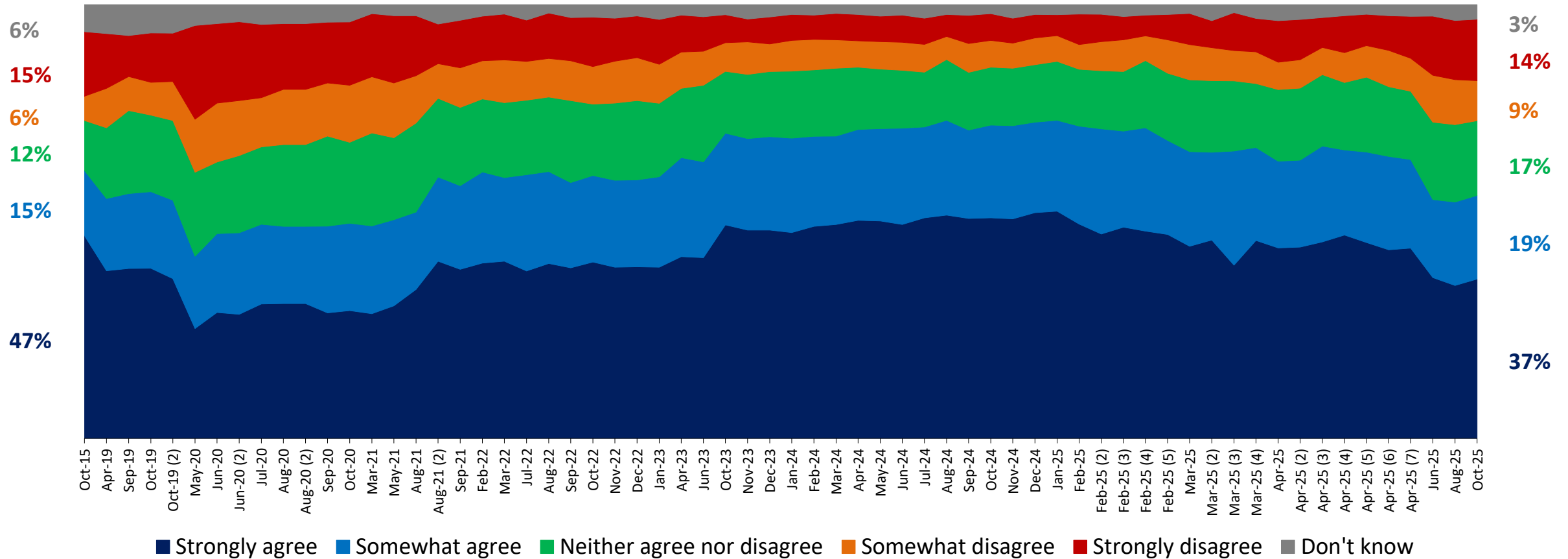
**Time For Change**

# Time for Change Tracking: Agreement on 'Time for a change' remains statistically unchanged since June (at 56%)



Do you agree or disagree with the following statements? - It is time for a change in government here in Canada

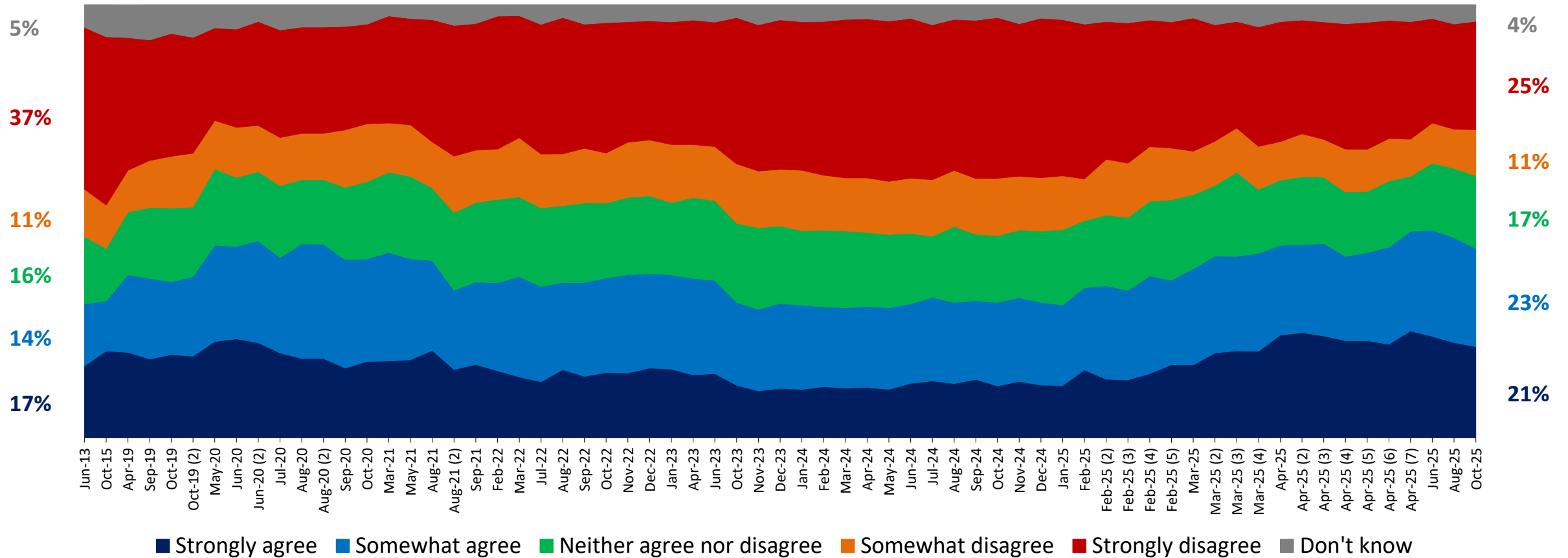
[asked of all respondents; n=2500]



# Time for Change Tracking: 44% of Canadians believe Liberals are the best party to govern a decrease since the peak of 48% in June



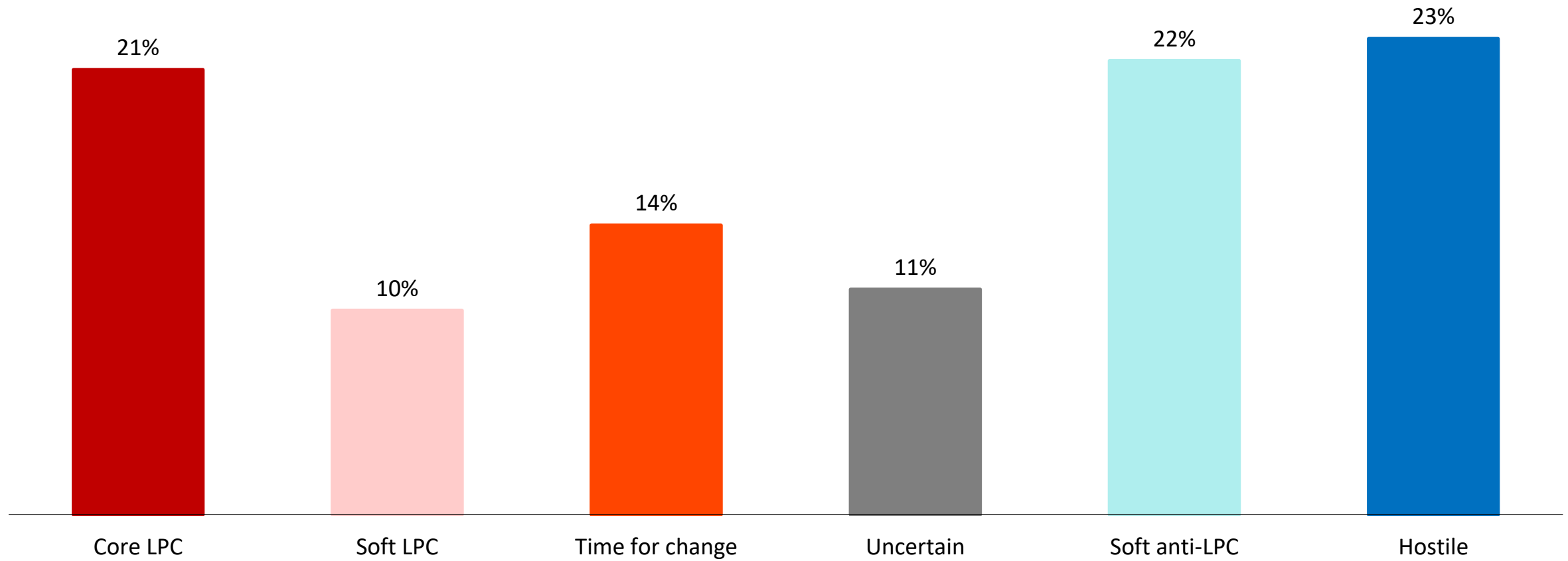
Do you agree or disagree with the following statements? - The Liberals may have their problems but they are still the best party to form government  
[asked of all respondents; n=2500]



# Time for Change Segmentation: Nearly 1-in-3 (23%) are Hostile, followed by Soft anti-LPC (22%)



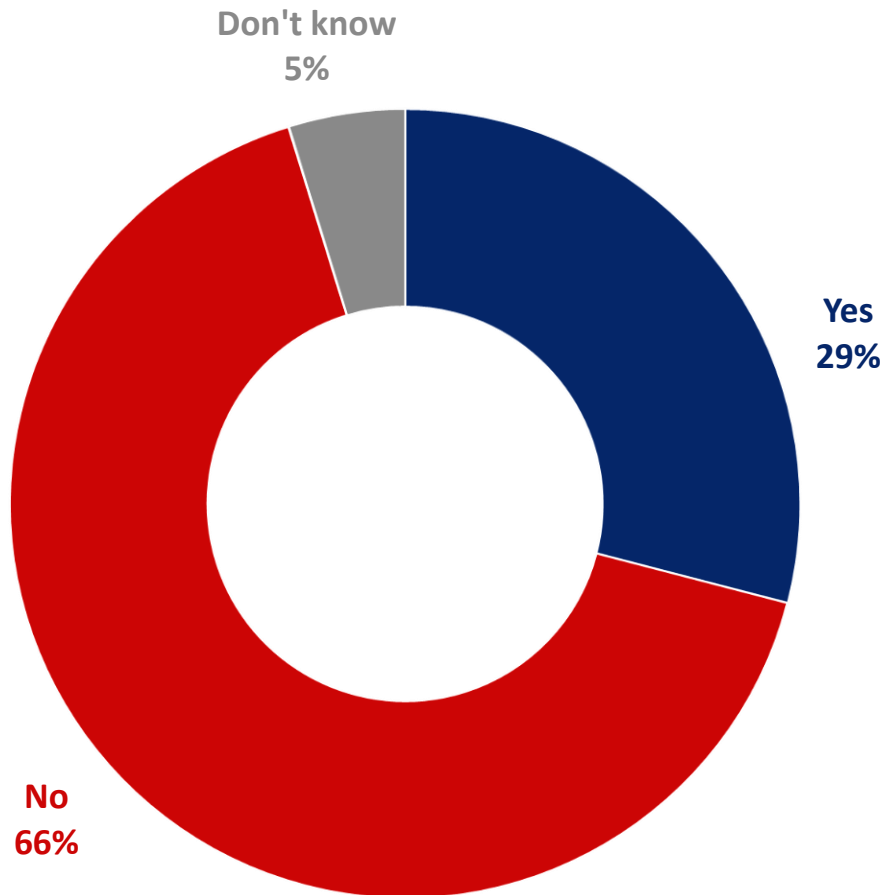
Time for Change segmentation: Agree with 'The Liberals may have their problems but they are still the best party to form government' BY Agree with 'It is time for a change in government here in Canada'.  
[asked of all respondents; n=2500]



# **Anticipating Federal Budget**

# Read, Seen, Heard Budget: 29% recall RSH about the federal budget, 66% don't

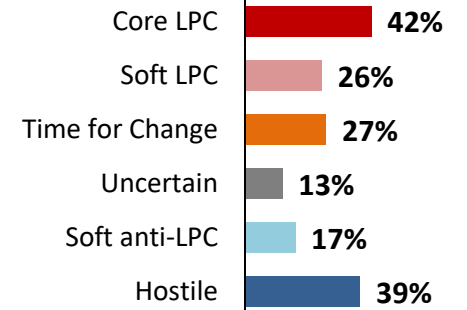
**Q** Have you read, seen or heard anything about the federal budget that will be presented in Parliament on Tuesday, November 4th, 2025?  
[asked of all respondents, n=1,000]



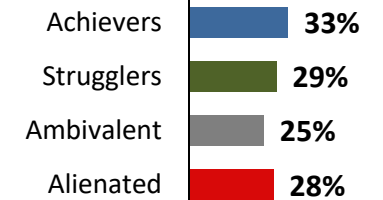
## Segmentation

*Respondents who say 'Yes'*

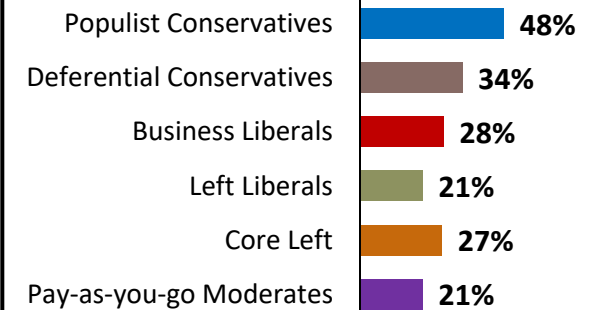
### Time for Change



### Economic Gap



### Values Clusters

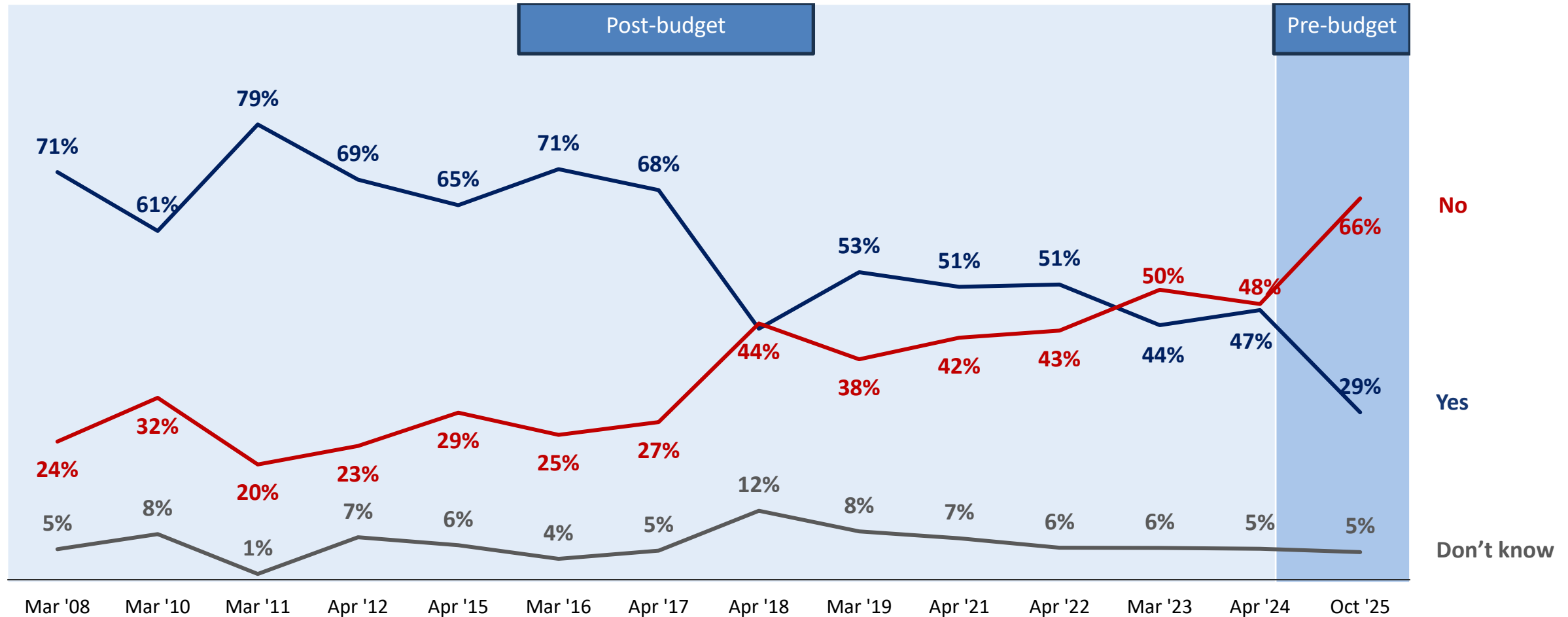


# Read, Seen, Heard Budget (Tracking): Pre-budget attention is significantly lower compared to post-budget



Have you read, seen or heard anything about the federal budget **that will be presented in** Parliament on Tuesday, November 4th, 2025?

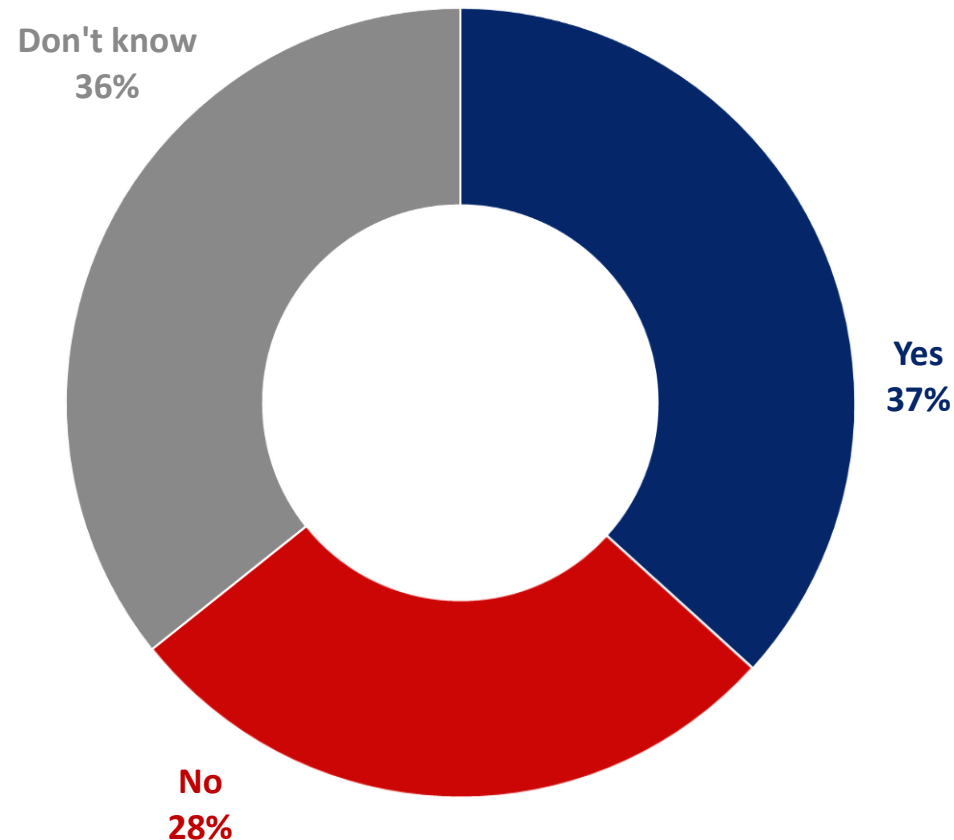
[asked of all respondents, n=1,000]



# **Expected Impact of the Federal Budget**

# Personal Impact: 37% say the federal budget will directly impact their personal situation and 36% don't know; 55% of Populist Conservatives agree

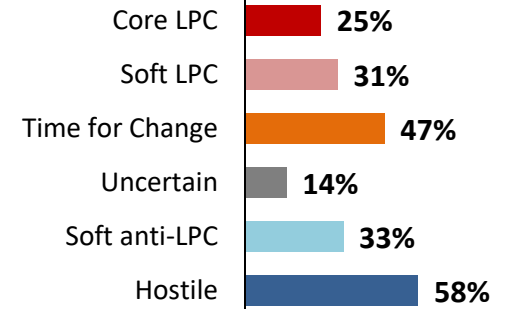
**Q** Do you think your own personal situation will be directly impacted by the new Liberal federal budget?  
[asked of all respondents, n=1,000]



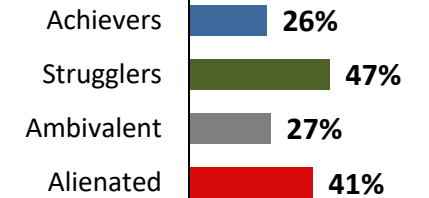
## Segmentation

*Respondents who say 'Yes'*

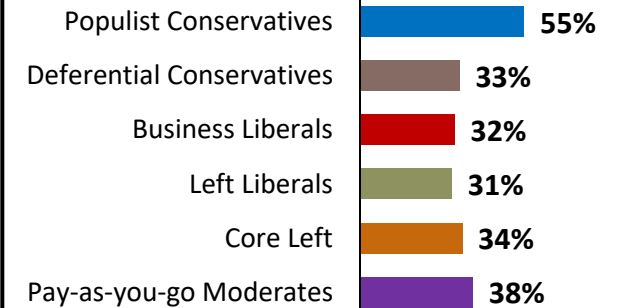
### Time for Change



### Economic Gap

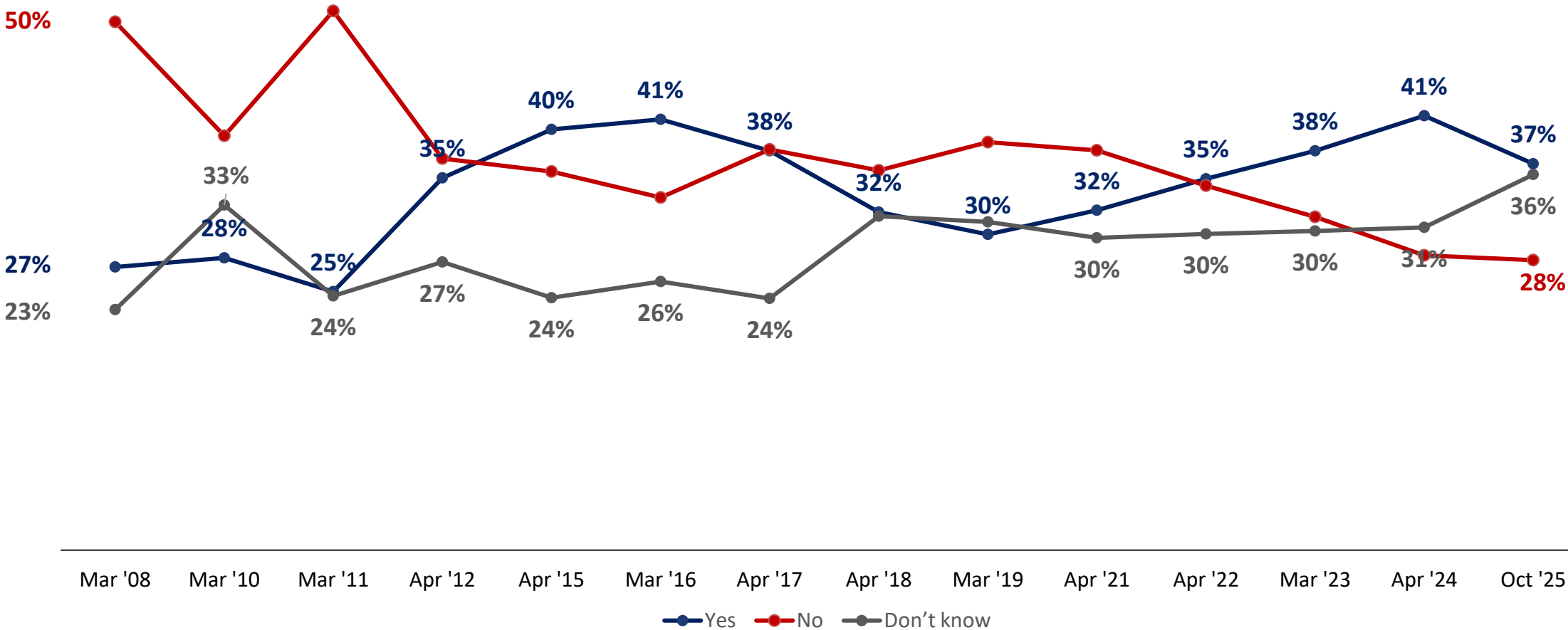


### Values Clusters



# Personal Impact (Tracking): Uncertainty is at its peak (36%); only 28% anticipate no impact

Q Do you think your own personal situation will be directly impacted by the new Liberal federal budget?  
[asked of all respondents, n=1,000]

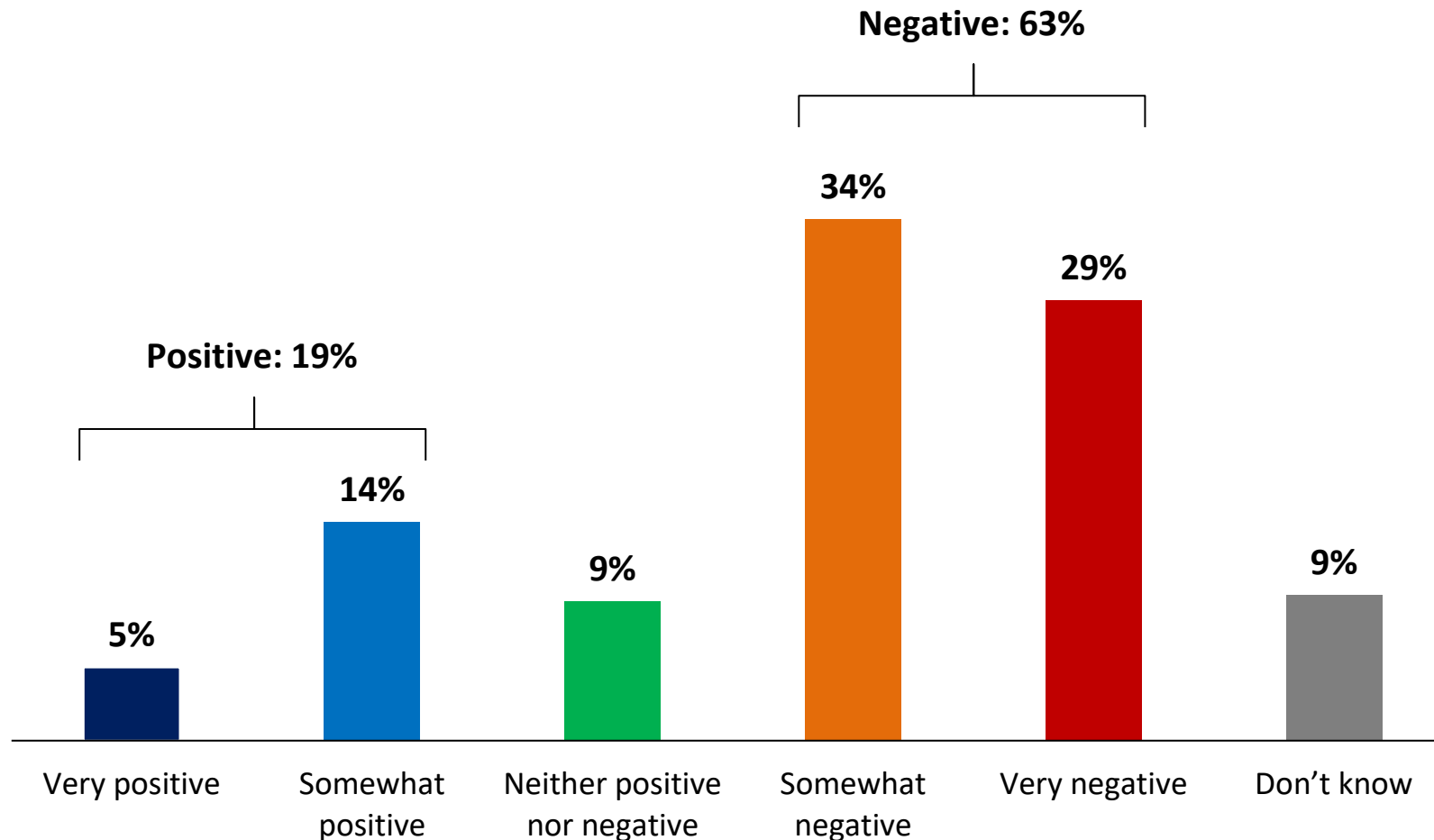


# Type of Impact: More than 3-in-5 say the federal budget will have a negative personal impact; Hostile and Populist Conservatives most likely to say 'negative'



Would that be a positive or a negative impact?

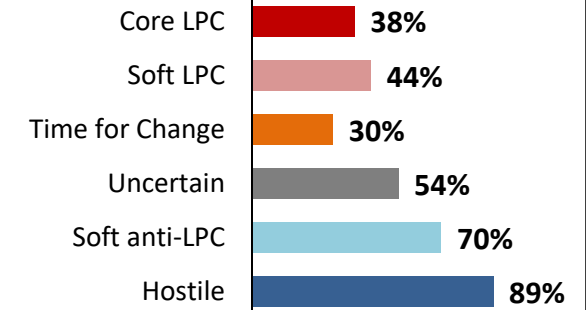
[asked of those who feel they would be impacted, n=367]



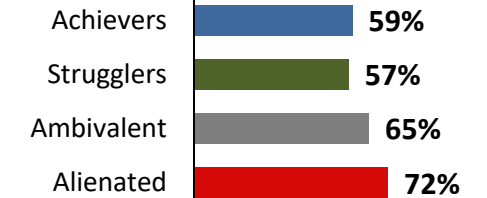
## Segmentation

*Respondents who say 'Negative'*

### Time for Change



### Economic Gap

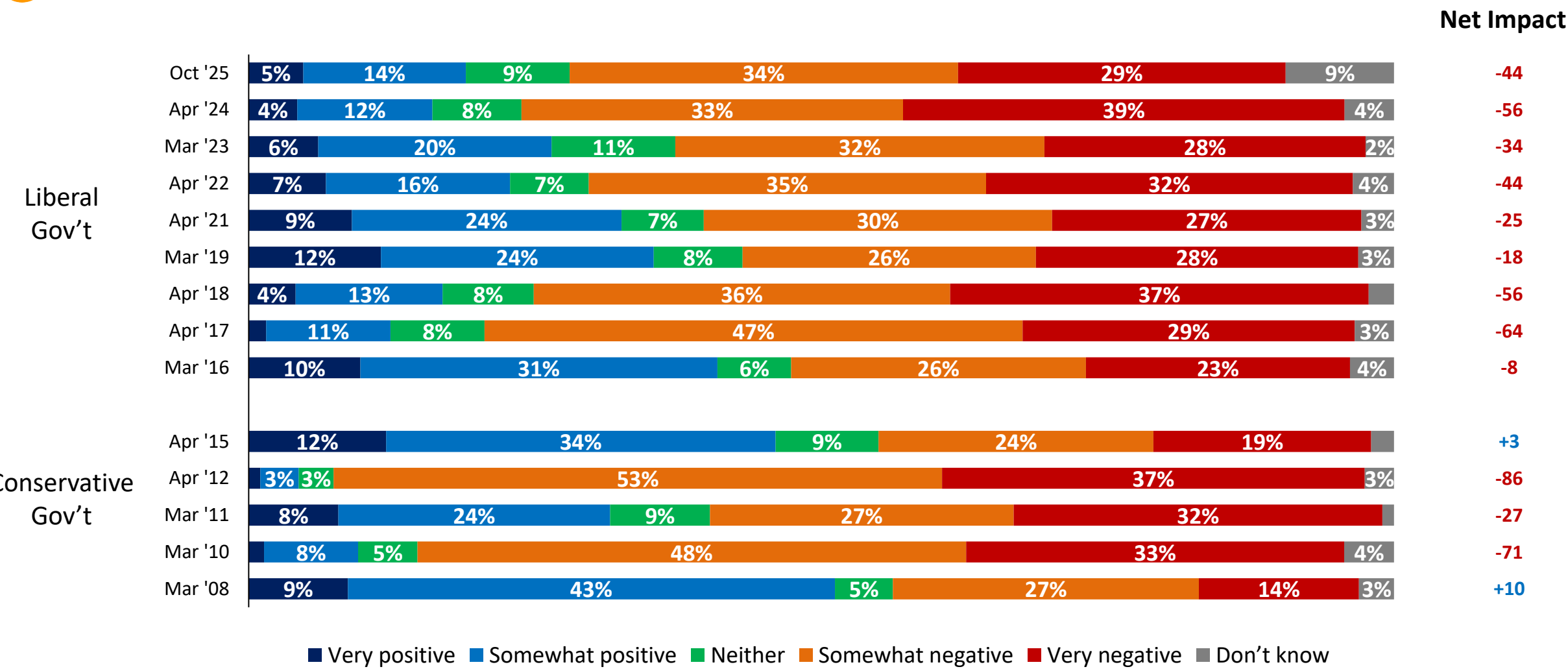


### Values Clusters



# Type of Impact (Tracking): Similarly to 2022, net impact has declined now at -44

Q Would that be a positive or a negative impact?  
[asked of those who feel they would be impacted, n=367]



# Type of Impact by Age: Perception of impact is more positive among younger Canadians, but net positive is still highly negative across all age groups

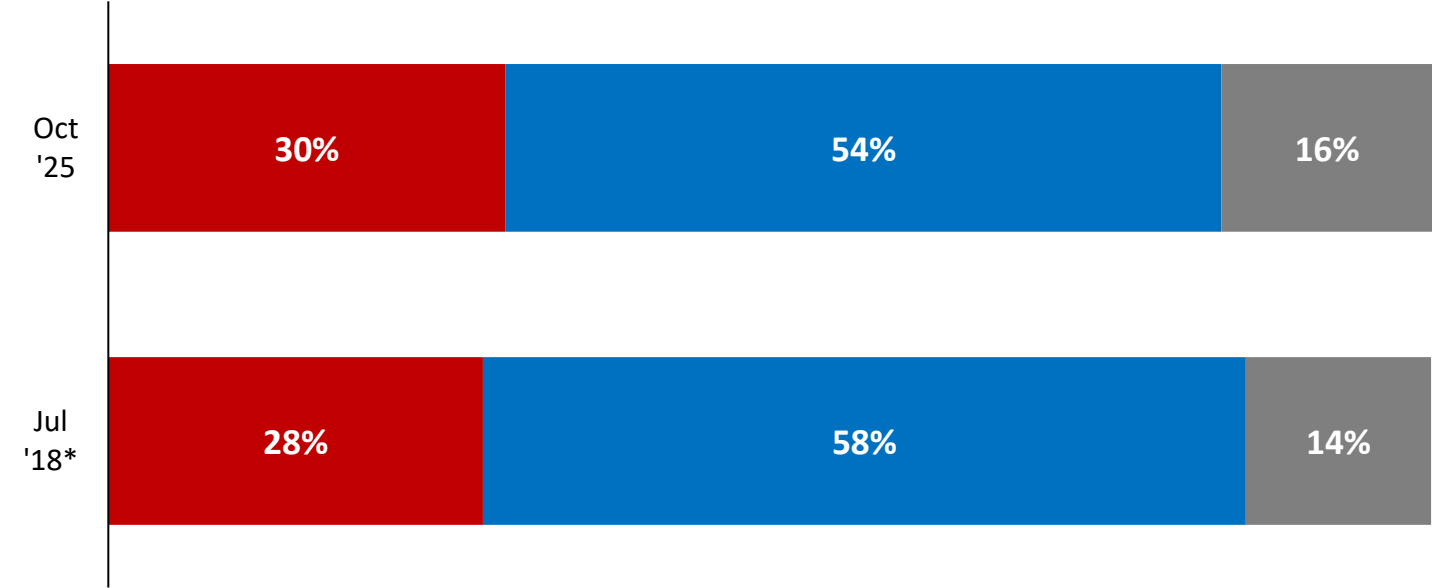
 Would that be a positive or a negative impact?  
[asked of those who feel they would be impacted, n=367]

|                   | Total | Age              |                  |                |
|-------------------|-------|------------------|------------------|----------------|
|                   |       | 18-34<br>(n=103) | 35-54<br>(n=129) | 55+<br>(n=135) |
| Very positive     | 5%    | 11%              | 4%               | 1%             |
| Somewhat positive | 14%   | 20%              | 14%              | 10%            |
| Neither           | 9%    | 11%              | 8%               | 9%             |
| Somewhat negative | 34%   | 31%              | 35%              | 35%            |
| Very negative     | 29%   | 16%              | 30%              | 37%            |
| Don't know        | 9%    | 11%              | 9%               | 9%             |
| Positive          | 19%   | 31%              | 18%              | 11%            |
| Negative          | 63%   | 47%              | 65%              | 72%            |
| Net Positive      | -44%  | -16%             | -47%             | -62%           |

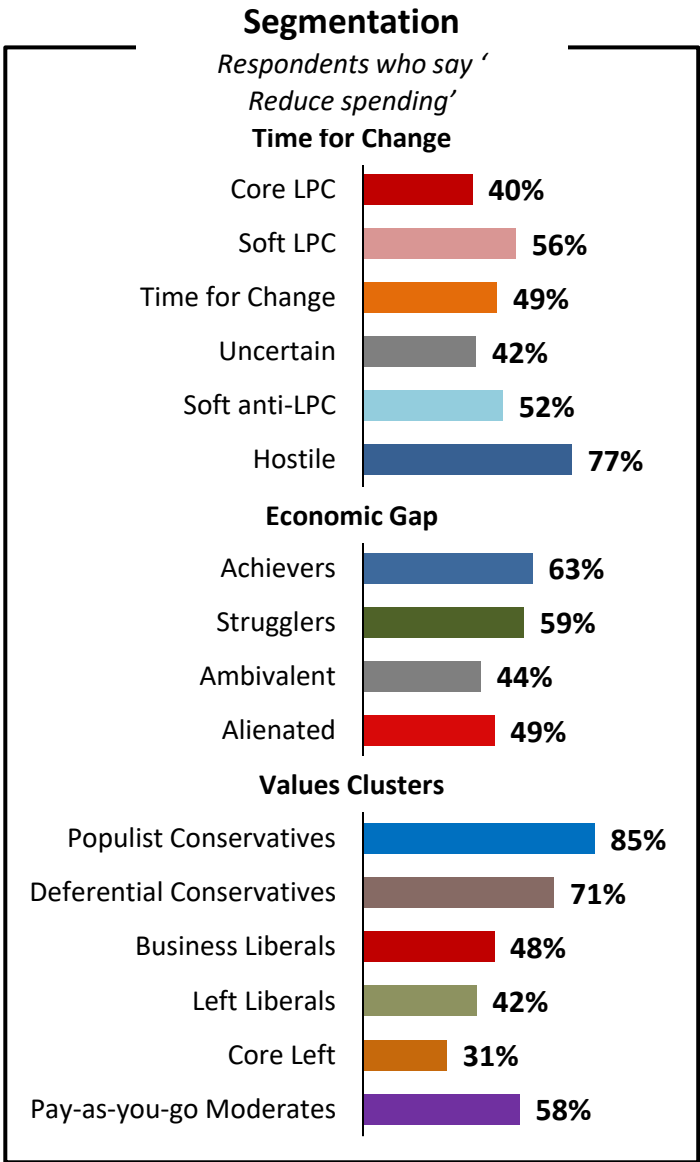
# Government Spending

# Spending: More than half want restraint, while only 30% want federal government to increase spending

**Q** In developing its annual budget, it is more important for the Federal government to ... (Rotate 1 & 2)  
[October 2025 CTM; all respondents, n=1,000]



- Increase spending to provide more and better services to Canadians
- Hold the line on the growth of government spending in order to provide room to reduce taxes and pay down the national's debt
- Don't know

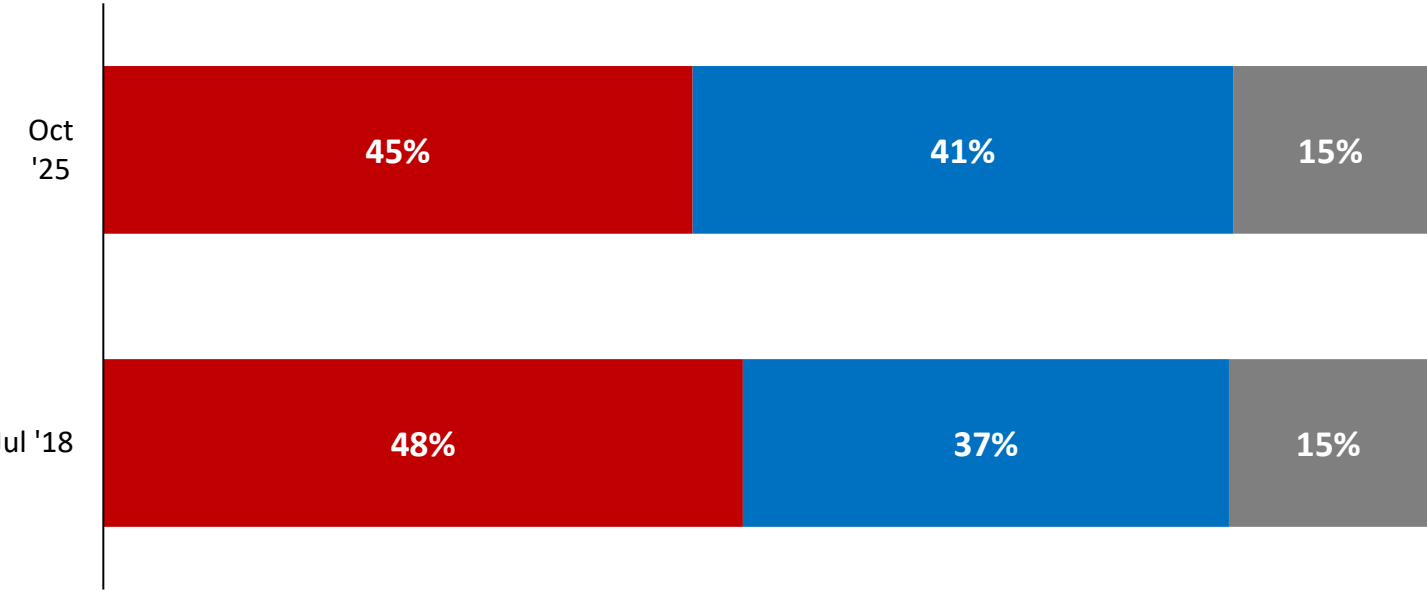


\*In July 2018 it was asked for the [PROVINCE] government instead of Federal gov't

# Spending: Response is mixed as 45% say to increase social spending, while 41% say to focus on long term economic growth



Which statement is closest to your point of view?  
[October 2025 CTM; all respondents, n=1,000]

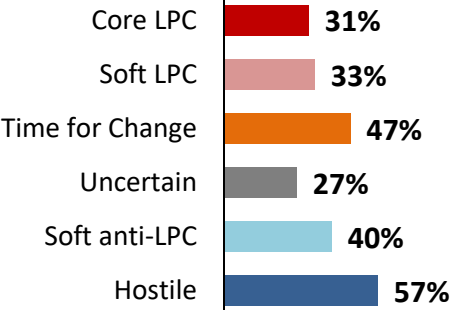


- When it comes to social issues like health care, poverty and homelessness, government needs to increase social spending now, even if other important investments have to wait
- When it comes to social issues like health care, poverty and homelessness, government needs to focus on long term economic growth first, even if that means some social spending will have to wait.
- Don't know

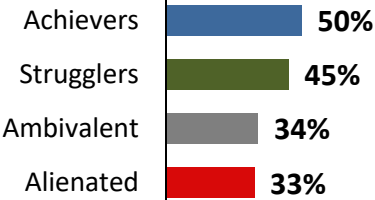
## Segmentation

Respondents who say  
'Focus on long term economic growth'

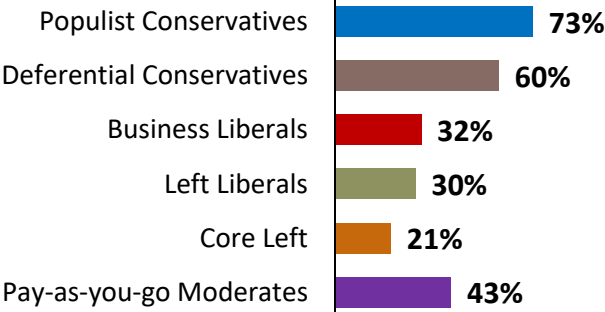
### Time for Change



### Economic Gap



### Values Clusters



\*In July 2018 it was asked for the [PROVINCE] government instead of Federal gov't

Spending: Largest dissonance between wanting to hold the line on spending while at the same time spending on social programs, is among BL and LL

Canada – October 2025 CTM

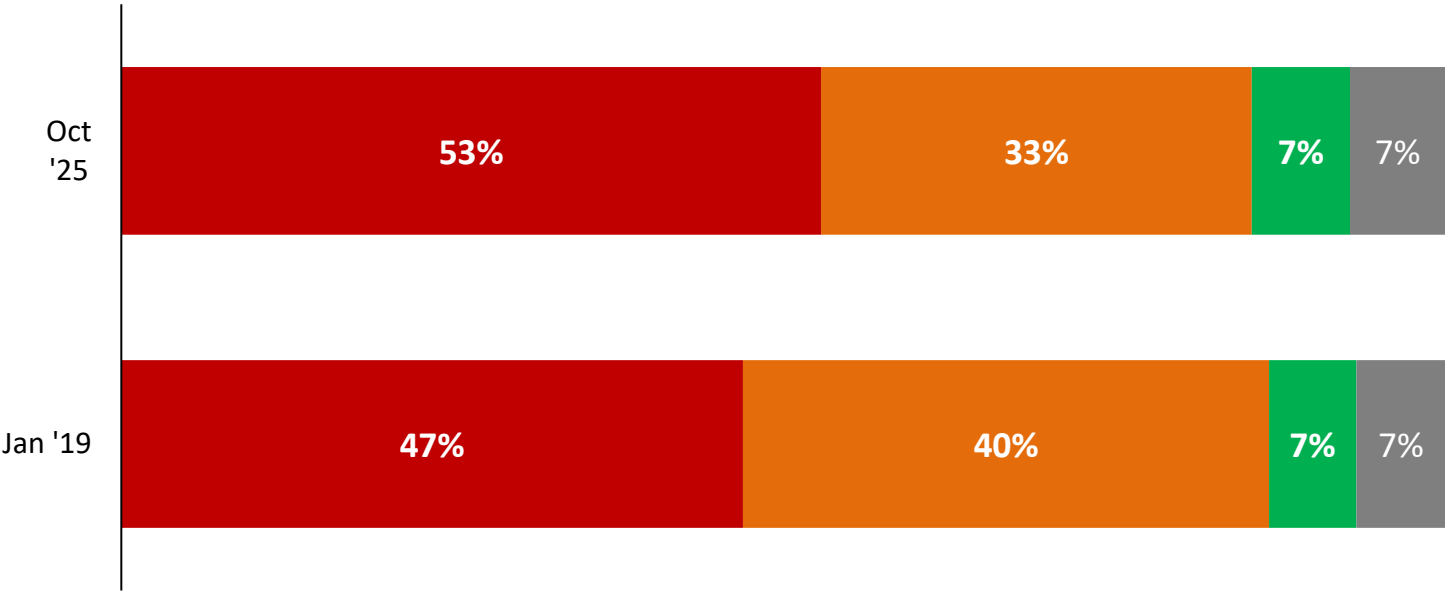
|                                                    |                                                                 | Populist<br>Conservatives<br>(PC) | Deferential<br>Conservatives<br>(DC) | Business<br>Liberals<br>(BL) | Left<br>Liberals<br>(BL) | Core<br>Left<br>(CL) | Pay-as-you-go<br>Moderates<br>(PAYGM) |
|----------------------------------------------------|-----------------------------------------------------------------|-----------------------------------|--------------------------------------|------------------------------|--------------------------|----------------------|---------------------------------------|
| In developing<br>budget...                         | Increase spending for<br>more/better services                   | 10%                               | 19%                                  | 38%                          | 36%                      | 51%                  | 19%                                   |
|                                                    | Hold the line on spending<br>for tax cuts or debt<br>reduction  | 85%                               | 71%                                  | 48%                          | 42%                      | 31%                  | 58%                                   |
|                                                    | NET<br>prefer spending                                          | -76                               | -52                                  | -10                          | -6                       | +20                  | -39                                   |
| Which comes<br>closest to your<br>point of view... | Spend on social issues now,<br>even if other things wait        | 21%                               | 29%                                  | 56%                          | 54%                      | 67%                  | 31%                                   |
|                                                    | Hold off on social issues;<br>focus on economic growth<br>first | 73%                               | 60%                                  | 32%                          | 30%                      | 21%                  | 43%                                   |
|                                                    | NET<br>prefer spending                                          | -52                               | -32                                  | +24                          | +24                      | +46                  | -12                                   |

\*In July 2018 it was asked for the [PROVINCE] government instead of Federal gov't

# Political Alienation: Majority (85%) say government wastes a lot or some of the money; only 7% say they don't waste very much of it

Q Do you think the people in government waste a lot of the money we pay in taxes, waste some of it, or don't waste very much of it?

[October 2025 CTM; all respondents, n=1,000]

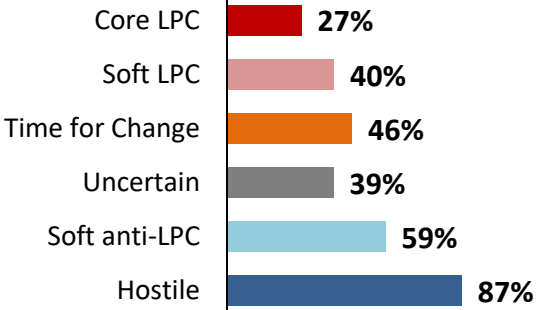


■ Waste a lot of the money ■ Waste some of it ■ Don't waste very much of it ■ Don't know

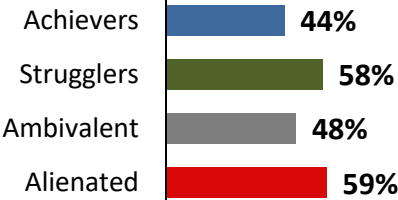
## Segmentation

Respondents who say 'Waste a lot of the money'

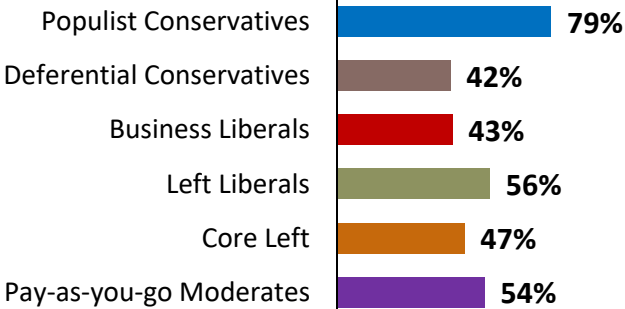
### Time for Change



### Economic Gap



### Values Clusters

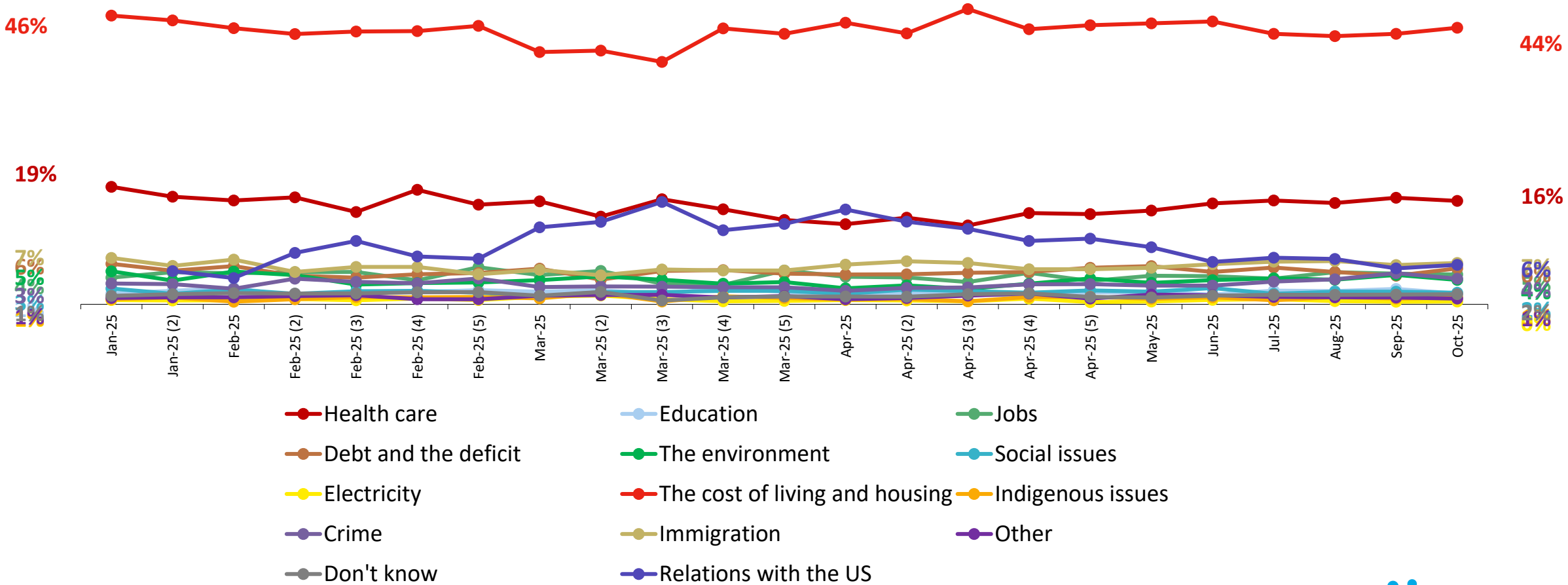


\*In July 2018 it was asked for the [PROVINCE] government instead of Federal gov't

# Spending Priorities

# Most Important Issue Tracking: Top tracking issues remain the cost of living and housing. Health care, and relations with the US fall far behind

Q Which of the following issues is the most important issue to you?  
[asked of all respondents; n=2500]

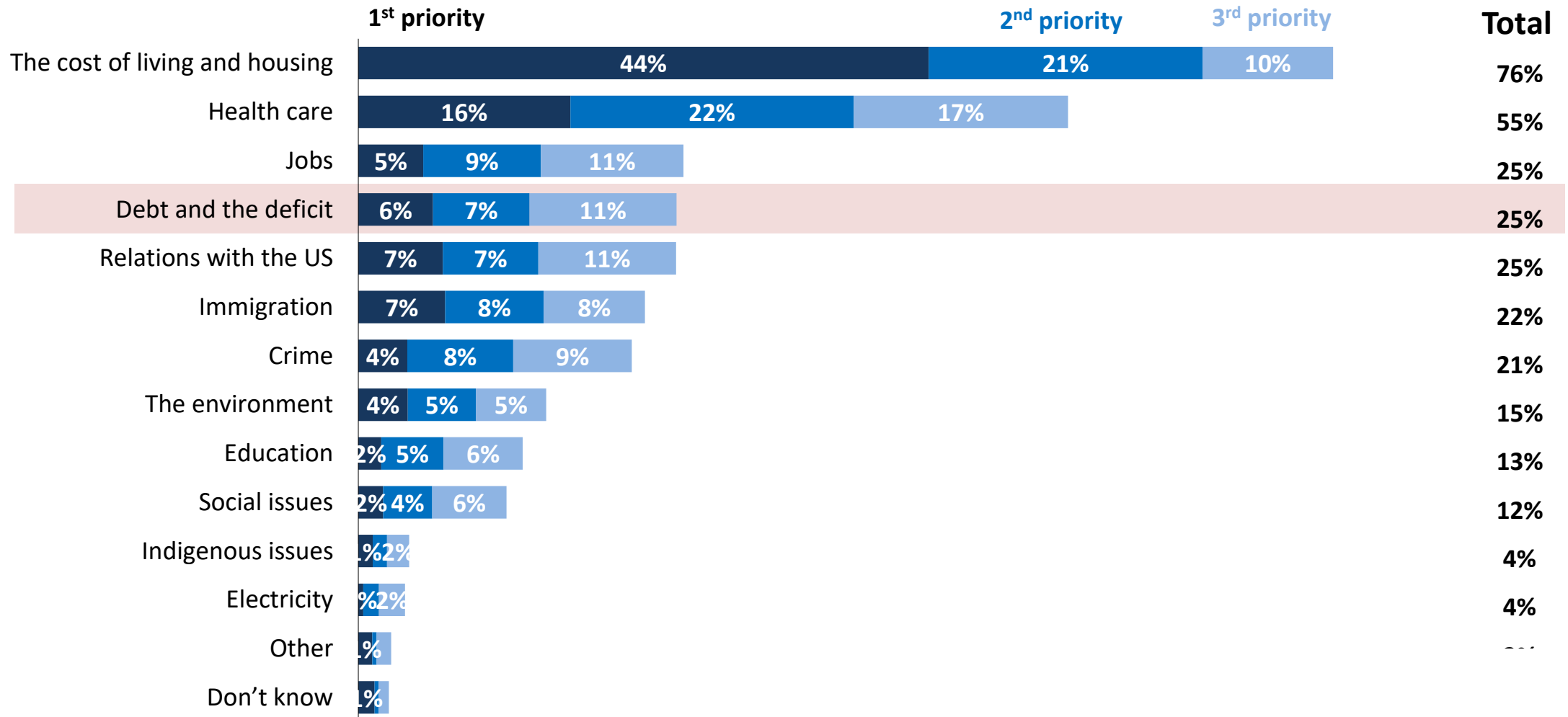


# Top Issues: The cost of living and housing, health care are top-tier issues followed by jobs, and debt and the deficit as second-tier issues



Which of the following issues is the most important issue to you?

[asked of all respondents, CTM2505 W3\_4 n=1,000]



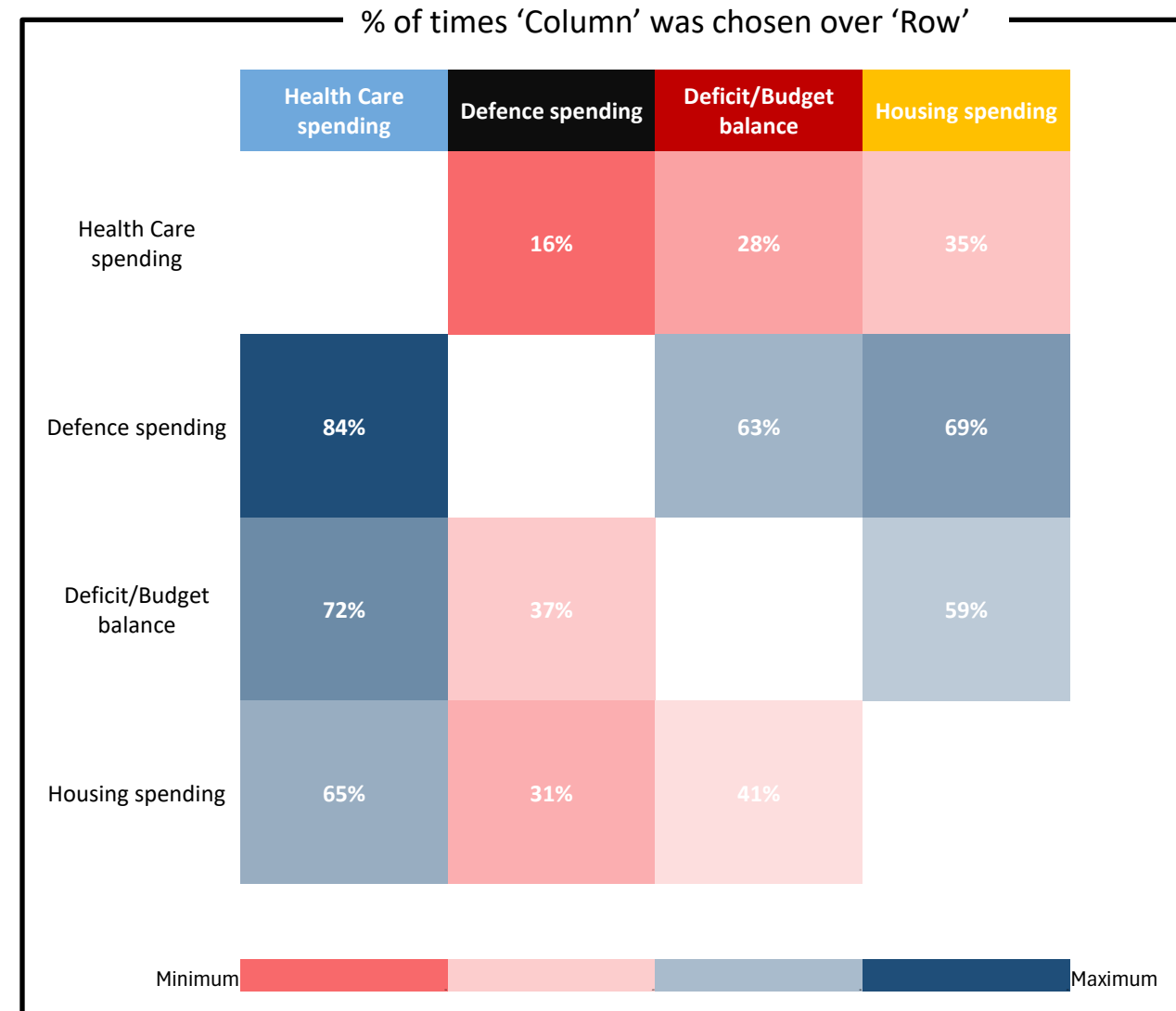
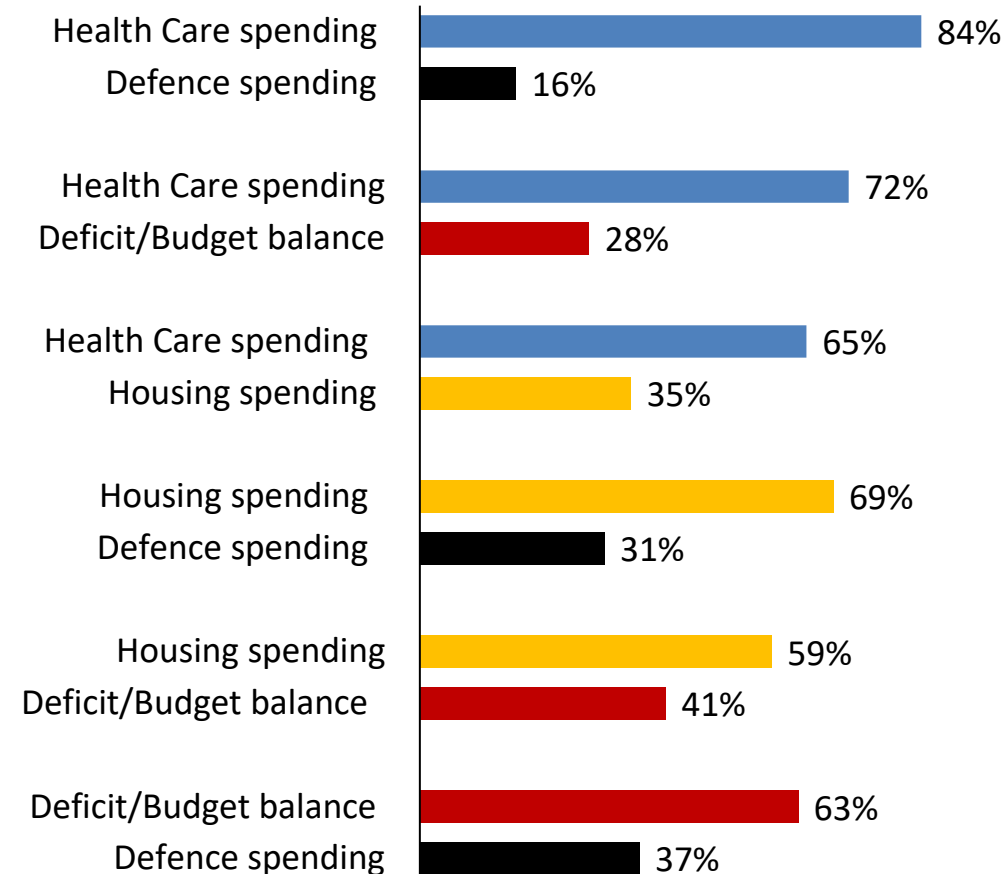
NOTE: 'No response' not shown.

# Federal Spending: Spending on health care is perceived as the most important, followed by housing, and deficit/budget balance



Thinking about federal government spending, please choose which of the following is more important in each pairing.

[asked of all respondents W3\_4 n=1,000]



# Methodology

# Survey Methodology - October 06<sup>th</sup> to 27<sup>th</sup> '25.



**These are the results of an online survey conducted between October 06, 2025 to October 27, 2025.**

**Method:** This online survey was conducted using INNOVATIVE’s Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. 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=4,106 Canadian citizens, 18 years or older. The results are nationally weighted to n=2,500 based on Census data from Statistics Canada.

**Field Dates:** October 06, 2025 to October 27, 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<br>(n) | Unweighted<br>(%) | Weighted<br>(n) | Weighted<br>(%) |
|------------------|-------------------|-------------------|-----------------|-----------------|
| Men 18-34        | 422               | 10.3%             | 335             | 13.5%           |
| Men 35-54        | 549               | 13.4%             | 396             | 15.9%           |
| Men 55+          | 1,087             | 26.6%             | 482             | 19.4%           |
| Women 18-34      | 411               | 10.1%             | 326             | 13.1%           |
| Women 35-54      | 643               | 15.7%             | 415             | 16.7%           |
| Women 55+        | 977               | 23.9%             | 535             | 21.5%           |
|                  |                   |                   |                 |                 |
| British Columbia | 625               | 15.2%             | 351             | 14%             |
| Alberta          | 512               | 12.5%             | 279             | 11.1%           |
| Prairies         | 305               | 7.4%              | 162             | 6.5%            |
| Ontario          | 1,553             | 37.8%             | 965             | 38.6%           |
| Québec           | 794               | 19.3%             | 575             | 23%             |
| Atlantic         | 317               | 7.7%              | 168             | 6.7%            |

# Survey Methodology – October 16<sup>th</sup> to 27<sup>th</sup> '25.



**These are the results of an online survey conducted between October 16, 2025 to October 27, 2025.**

**Method:** This online survey was conducted using INNOVATIVE’s Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. 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=2,001 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

**Field Dates:** October 16, 2025 to October 27, 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<br>(n) | Unweighted<br>(%) | Weighted<br>(n) | Weighted<br>(%) |
|------------------|-------------------|-------------------|-----------------|-----------------|
| Men 18-34        | 195               | 133               | 9.8%            | 13.4%           |
| Men 35-54        | 252               | 158               | 12.7%           | 16.0%           |
| Men 55+          | 559               | 193               | 28.1%           | 19.4%           |
| Women 18-34      | 200               | 128               | 10.1%           | 12.9%           |
| Women 35-54      | 279               | 164               | 14.0%           | 16.5%           |
| Women 55+        | 504               | 216               | 25.3%           | 21.8%           |
|                  |                   |                   |                 |                 |
| British Columbia | 284               | 140               | 14.2%           | 14.0%           |
| Alberta          | 256               | 112               | 12.8%           | 11.2%           |
| Prairies         | 132               | 65                | 6.6%            | 6.5%            |
| Ontario          | 763               | 386               | 38.1%           | 38.6%           |
| Québec           | 408               | 230               | 20.4%           | 23.0%           |
| Atlantic         | 158               | 67                | 7.9%            | 6.7%            |



For more information, please contact:

**Greg Lyle**

**President**

(416) 642-6429

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

**Report Contributors:**

**Pallavi Sodhi**, Consultant

**Marina Mandic**, Manager, Omnibus Research Services

**Building Understanding.**

