



Canada This Month

The Politics of

Responding to Trump

Federal Government Report

Public Opinion Research

Release Date: Jan 27, 2026

Field Dates: Jan 02 to Jan 13, 2026

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Study Overview



Building on findings from previous waves, this report tracks January data about Canadians' vote intentions, approval of the federal government, and opinions of leadership in the context of **Managing US Relations**.

Key Findings

1

The federal race remains highly competitive (Liberals 41% vs. Conservatives 39%), but the age divide is stark; Conservatives lead among middle-aged voters (44% vs. 35%), Liberals dominate seniors (47% vs. 35%), and younger Canadians remain a true battleground (38% vs. 37%). In terms of stance toward the US, Hawks are the most likely to vote NDP, those conflicted between hawkish and dovish approaches are the most likely to vote Liberal, and those unlikely to support any policy stance (“Uncommitted”), are the most likely to vote Conservative.

2

On the issue of responding to Donald Trump, both the Liberal federal government and the CPC have lost more than 10-points in approval since the election. In both cases, voters have become more uncertain rather than more negative. The Liberals do best among older voters. The CPC does better among younger voters.

3

Carney still ahead on handling Trump as Conservative support erodes. While evaluations of Carney’s leadership has worsened since post-election, Carney still holds a 17-point advantage over Poilievre on managing Canada–U.S. relations. Net approval of the CPC and Poilievre’s response to Trump has dropped 15 points since early April and is now negative at -11pts, driven largely by rising uncertainty rather than outright opposition.

4

Affordability gains further ground over responding to Trump among voters. Since post-election, the share of voters prioritizing a response to Trump has fallen six points (13% now vs. 19%), while affordability has further solidified its position as the top issue (41% now vs. 38%). Voters who prioritize responding to Trump are more likely to support the Liberals, whereas those who prioritize affordability are more likely to support the Conservatives. Issue priorities also vary by age, with younger Canadians significantly more likely to prioritize affordability.

Key Voter Segments

Key Segmentations: We use attitudinal clusters to explore opinions within groups that share common motivations. Detailed definitions and results for each segment are included in the appendix.

Political Value Clusters

We group Canadians into six “values” clusters based on 4 key political values:

- Populist Conservatives** (12%) - Believe government should listen to common sense, not experts, and trust the profit system.
- Deferential Conservatives** (11%) - Support government decisions based on affordability and trust expert guidance over public opinion.
- Business Liberals** (24%) - Champion equal opportunity and public need, favoring expertise in policy decisions.
- Left Liberals** (16%) - Balance equal opportunity with wealth redistribution while respecting both experts and common sense.
- Core Left** (17%) - Believe the profit system brings out the worst in people and government should redistribute wealth
- Pay-as-you-go Moderates** (20%) - Want government spending based on affordability but support creating equal opportunity.

Economic Gap

The economic gap segmentation divides Canadians by their outlook on their economic future, splitting them into four groups:

- Canadian Dream Achievers** (24%) - Optimistic Canadians who believe hard work still leads to success.
- Canadian Dream Strugglers** (32%) - Believe in the dream but find it increasingly difficult to get ahead.
- Ambivalent** (21%) - Uncertain about whether opportunity exists or if hard work pays off anymore.
- Alienated** (23%) - Don't believe in the Canadian Dream and feel the system doesn't work

Time For Change

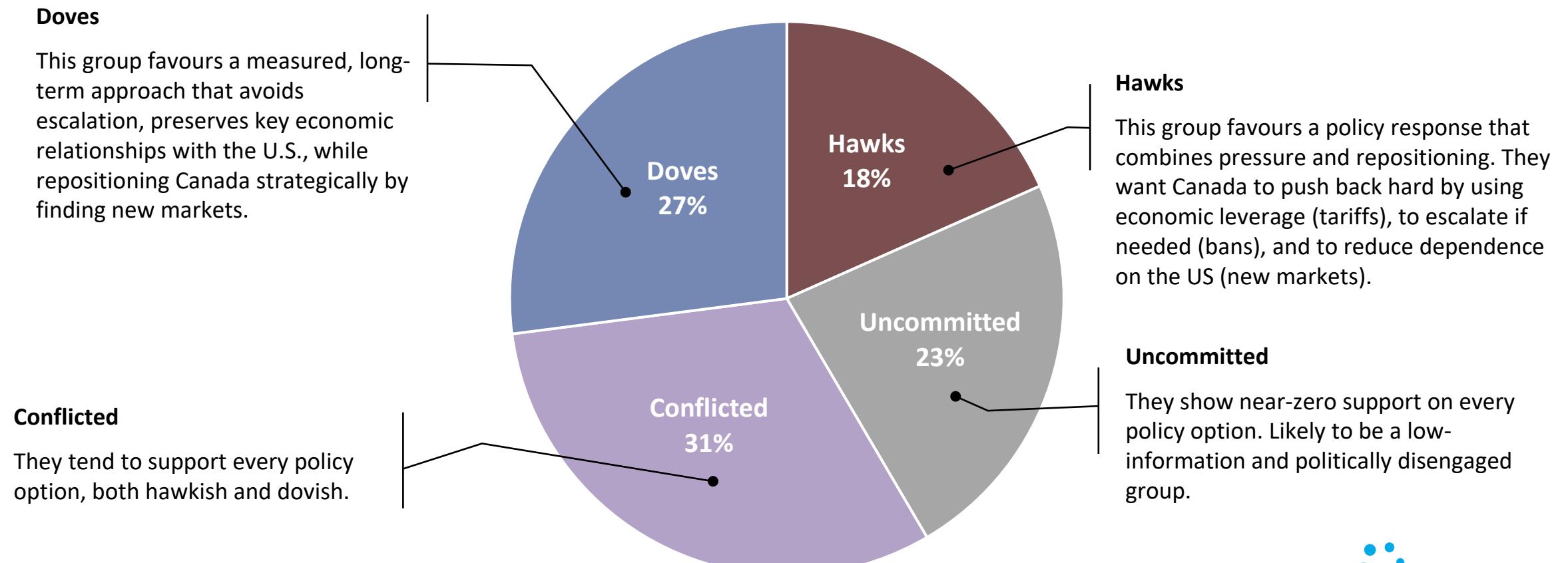
This segmentation separates Canadians by their views on the incumbent government. Is it time for a change, and is there a better alternative than the current government? This creates six groups:

- Core Liberals** (24%) - Strongly support the LPCs and don't want change.
- Soft Liberals** (10%) - Lean toward LPCs but aren't firmly committed.
- Time for Change Liberals** (13%) - Want change but still see LPCs as the best option to govern.
- Uncertain** (10%) - Conflicted about whether it's time for a change at all
- Soft anti-Liberals** (21%) - Want change and don't see LPCs as the best government option
- Hostile** (21%) - Strongly oppose LPCs and are eager for change

Stance toward U.S. Clusters:

Canadians are more likely to be Doves (27%) than Hawks (18%)

Respondents' opinions on different ways in which the Canadian government can respond to the tariff threats posed by Donald Trump (reciprocal measures, not responding at all, being patient, finding other partners, or completely severing exports) were used to create four clusters that reflect how Canadians differ in their views on the stance the federal government should take.



Stance toward U.S. Segmentation

| Core Stance toward U.S. Items by the Stance toward U.S. Segmentation | Total | Hawks | Conflicted | Uncommitted | Doves | |
|---|----------------------------|---------|------------|-------------|---------|-----|
| | (n=1500) | (n=275) | (n=471) | (n=348) | (n=406) | |
| Since US tariffs on Canadian goods will raise the cost of living in the US, Canada should be patient and wait for US consumers and businesses to put pressure on Trump to remove those tariffs | Agree | 56% | 0% | 100% | 11% | 82% |
| | Neither agree nor disagree | 19% | 44% | 0% | 37% | 8% |
| | Disagree | 15% | 49% | 0% | 18% | 8% |
| | Don't know | 10% | 7% | 0% | 34% | 2% |
| The only way to make a bully like Trump back down is to match his tariffs on Canadian products with our own tariffs on American products , even if that raises prices for Canadian consumers. | Agree | 42% | 69% | 70% | 7% | 20% |
| | Neither agree nor disagree | 22% | 12% | 10% | 37% | 30% |
| | Disagree | 26% | 16% | 19% | 25% | 44% |
| | Don't know | 10% | 3% | 2% | 31% | 6% |
| Donald Trump's tariff threat has highlighted the need for Canada to increase the amount we export overseas and to reduce our economic dependence on the US . | Agree | 75% | 95% | 95% | 14% | 92% |
| | Neither agree nor disagree | 11% | 2% | 3% | 40% | 3% |
| | Disagree | 6% | 2% | 2% | 16% | 3% |
| | Don't know | 7% | 1% | <1% | 30% | 1% |
| If the US imposes tariffs on Canadians exports to the US, some people have suggested that Canada cut off exports of key Canadian products , such as car parts, electricity or oil and gas. | Agree | 52% | 83% | 98% | 13% | 10% |
| | Neither agree nor disagree | 18% | 5% | <1% | 33% | 33% |
| | Disagree | 18% | 9% | 1% | 25% | 39% |
| | Don't know | 12% | 2% | <1% | 29% | 18% |
| Given the jobs and long-term economic benefits created by Canada's oil and gas exports, we should be careful not to take actions in the short run that could hurt our long-term relationship. | Support | 51% | 41% | 58% | 22% | 75% |
| | Neither support nor oppose | 23% | 23% | 21% | 34% | 14% |
| | Oppose | 15% | 29% | 17% | 11% | 7% |
| | Don't know | 11% | 7% | 4% | 33% | 4% |

Stance toward U.S. BY Value Cluster: Populist and Diferential Conservatives are more likely to be Doves

| Stance toward U.S. Clusters | Value Clusters | | | | | | |
|-----------------------------|----------------|---------------------------|------------------------------|----------------------|---------------|-----------|----------------------------|
| | Total | Populist Conservatives | Deferential Conservatives | Business Liberals | Left Liberals | Core Left | Pay-as-you-go Moderates |
| | (n=1,500) | (n=182) | (n=163) | (n=356) | (n=241) | (n=250) | (n=307) |
| Hawks | 18% | 17% | 16% | 20% | 19% | 26% | 13% |
| Conflicted | 31% | 27% | 31% | 34% | 35% | 29% | 29% |
| Uncommitted | 23% | 17% | 19% | 19% | 22% | 20% | 37% |
| Doves | 27% | 39% | 33% | 27% | 24% | 25% | 21% |

Stance toward U.S. BY Time for a Change: Core LPC more likely to be Conflicted or Doves; Hostile are more likely to be Doves

| | | Time for Change Liberals | | | | | |
|-----------------------------|-----------|--------------------------|----------|-----------------|-----------|---------------|---------|
| Stance toward U.S. Clusters | Total | Core LPC | Soft LPC | Time for change | Uncertain | Soft anti-LPC | Hostile |
| | (n=1,500) | (n=360) | (n=155) | (n=193) | (n=149) | (n=322) | (n=321) |
| Hawks | 18% | 21% | 21% | 13% | 10% | 22% | 18% |
| Conflicted | 31% | 39% | 32% | 48% | 14% | 32% | 20% |
| Uncommitted | 23% | 6% | 22% | 18% | 56% | 25% | 29% |
| Doves | 27% | 33% | 26% | 22% | 20% | 21% | 33% |

Federal Vote

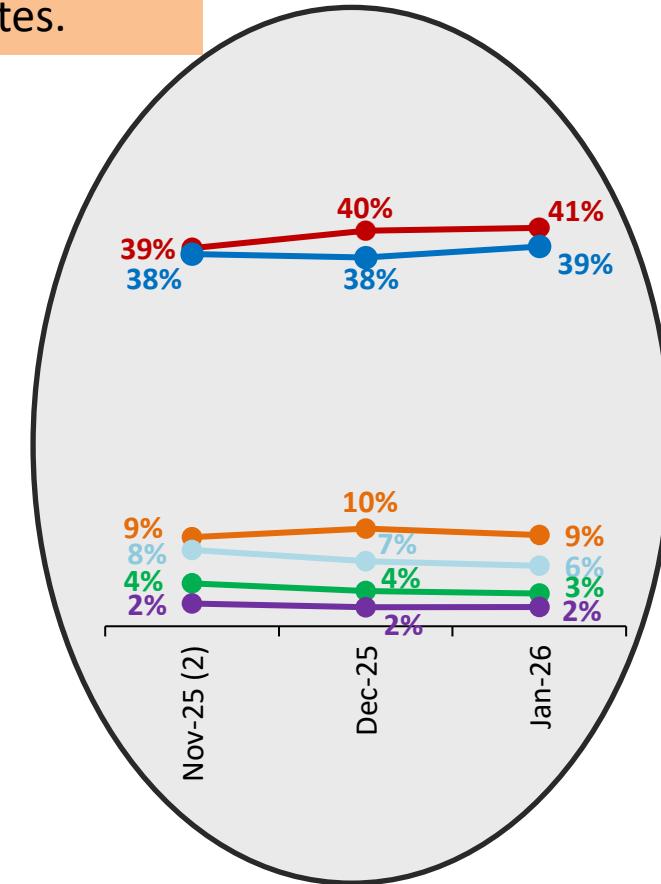
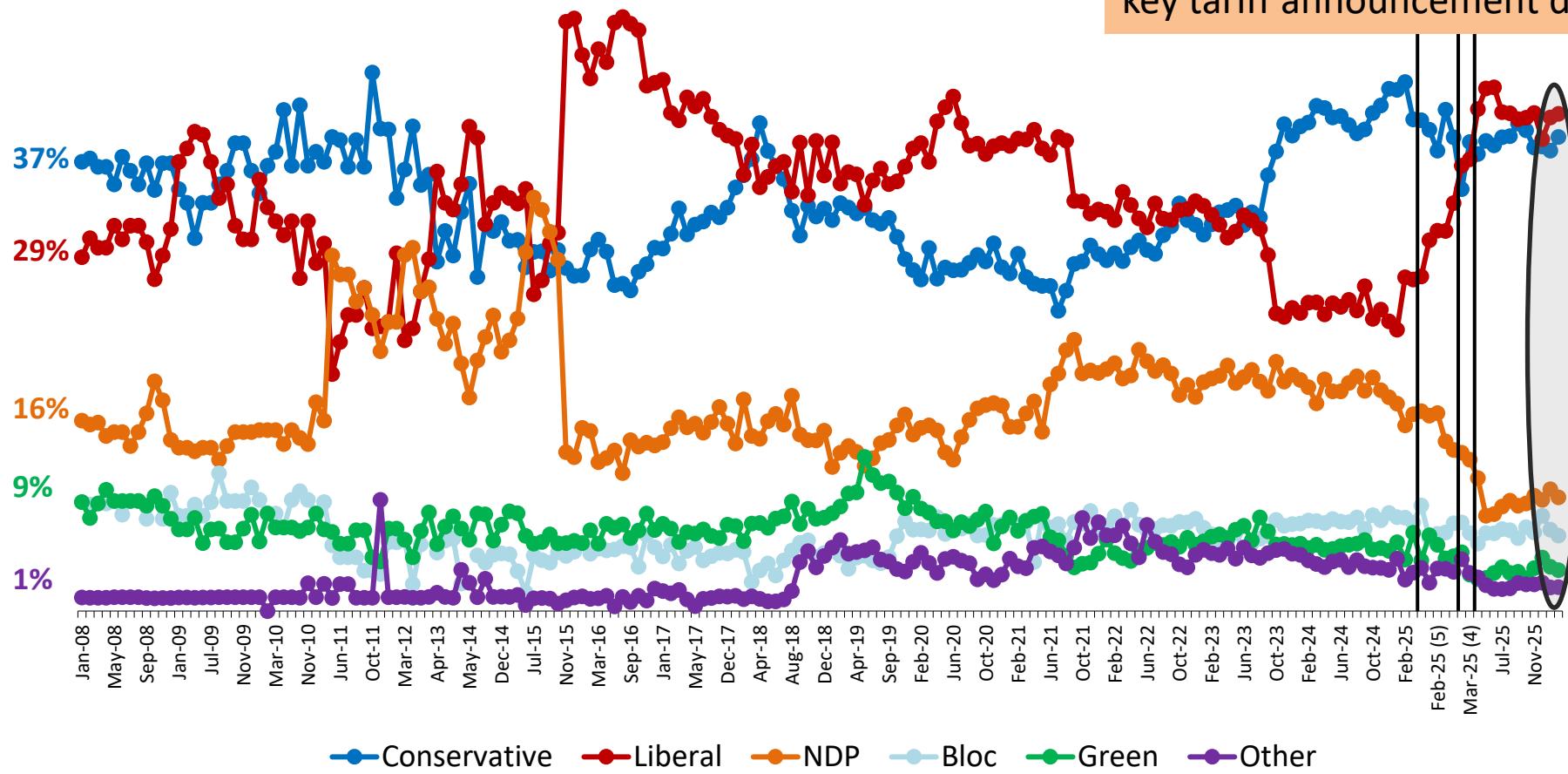
Federal Decided Vote Tracking: Liberals (41%) maintain the lead in federal decided vote, holding a two-point advantage over Conservatives

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If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**
[only decided voters; n=1,305]

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



Federal Vote BY Stance toward US: Conflicted are the most likely to vote Liberal; Uncommitted, to vote Conservative; Hawks, to vote NDP

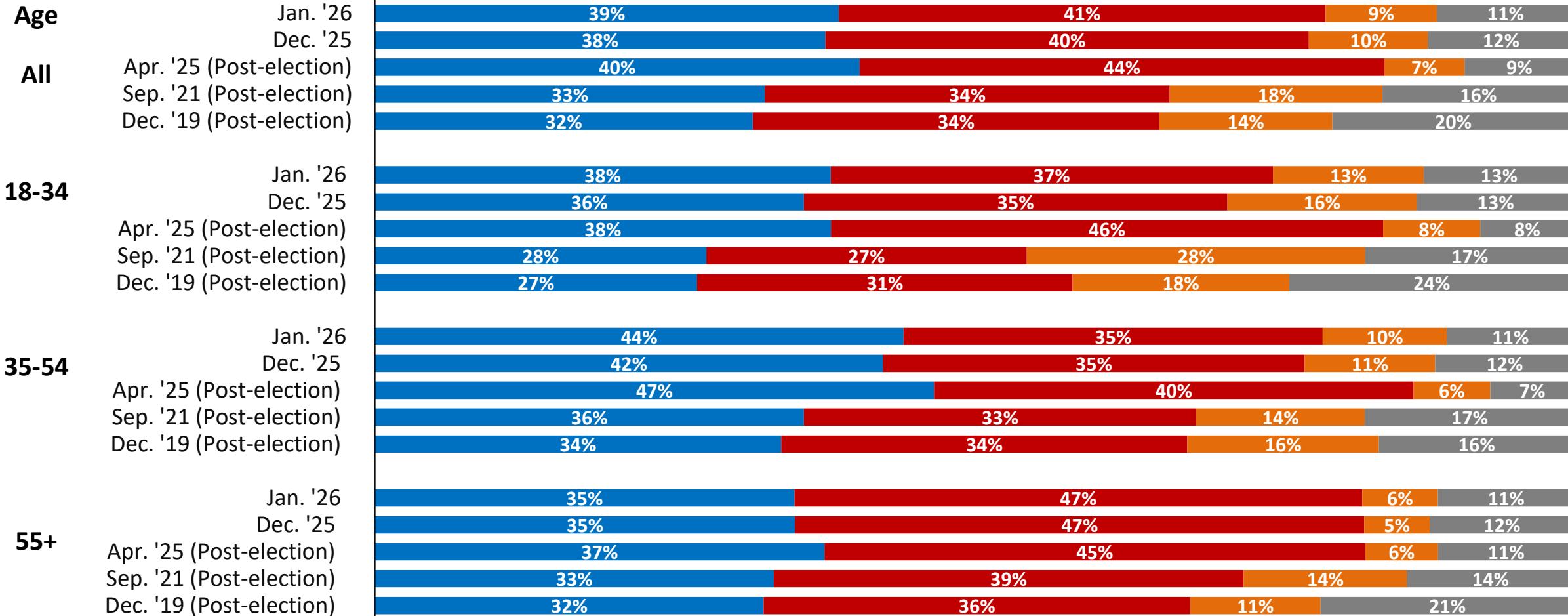
Stance toward U.S. Clusters

| Decided Federal Vote | Stance toward U.S. Clusters | | | | |
|----------------------|-----------------------------|---------|------------|-------------|---------|
| | Total | Hawks | Conflicted | Uncommitted | Doves |
| | (n=1,305) | (n=247) | (n=434) | (n=251) | (n=373) |
| Conservative | 39% | 35% | 32% | 50% | 41% |
| Liberal | 41% | 38% | 47% | 30% | 43% |
| NDP | 9% | 15% | 11% | 9% | 4% |
| Bloc | 6% | 7% | 6% | 5% | 6% |
| Green | 3% | 3% | 3% | 3% | 4% |
| Other | 2% | 2% | 1% | 3% | 2% |

Federal Vote Tracking: Conservatives lead Liberals among middle-aged Canadians; Liberals hold a clear advantage with older voters ¹⁴



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED] BY Age
 [only decided voters; n=1,305]



■ Conservative ■ Liberal ■ NDP ■ Other

Decided Vote by Value Cluster: Populist Conservatives and PAYG moderates most likely to vote Conservative, others Liberal

15

| | Value Clusters | | | | | |
|--------------|---------------------------|------------------------------|-------------------|---------------|-----------|----------------------------|
| | Populist Conservatives | Deferralial Conservatives | Business Liberals | Left Liberals | Core Left | Pay-as-you-go Moderates |
| | (n=356) | (n=247) | (n=671) | (n=463) | (n=485) | (n=428) |
| Conservative | 70% | 38% | 32% | 33% | 22% | 41% |
| Liberal | 21% | 44% | 48% | 42% | 45% | 35% |
| NDP | 2% | 5% | 7% | 12% | 19% | 13% |
| Bloc | 4% | 9% | 7% | 5% | 8% | 7% |
| Green | 1% | 3% | 4% | 5% | 4% | 3% |
| Other | 2% | 1% | 2% | 3% | 1% | 2% |

Decided Vote by Gender: Men and women are equally likely to vote for ¹⁶ the Conservative and Liberal party

| Federal Decided Vote | Gender | |
|----------------------|----------------|------------------|
| | Men (n=656) | Women (n=644) |
| Conservative | 40% | 38% |
| Liberal | 41% | 40% |
| NDP | 7% | 11% |
| Bloc | 6% | 6% |
| Green | 3% | 3% |
| Other | 2% | 2% |

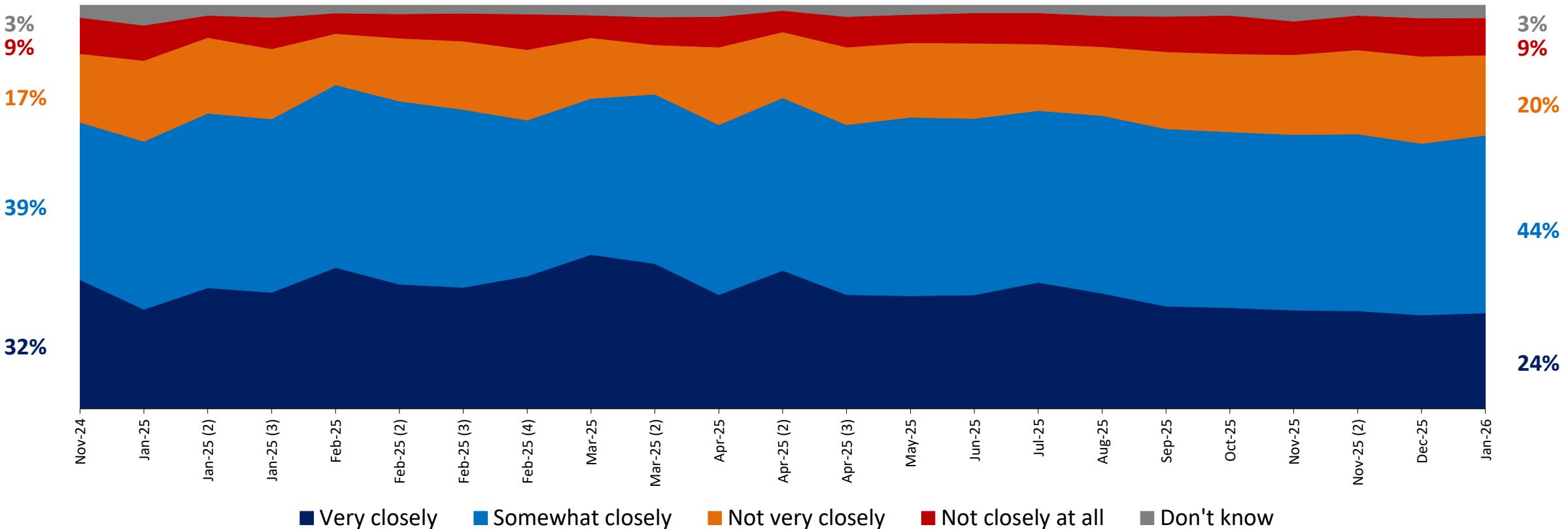
Reaction to Trump

Engagement with U.S.-Canada Relationship: Engagement remains statistically steady after dropping in September 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=1,500]



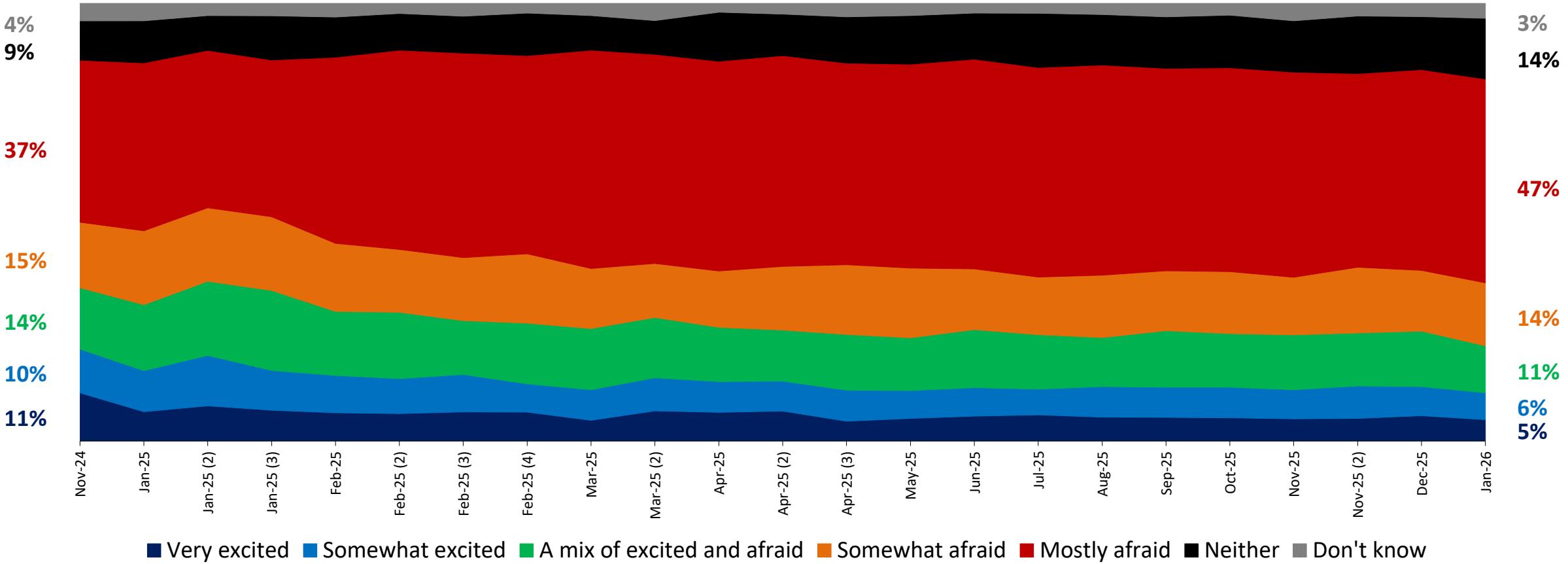
Current data: January 2026

Note: Question wording in Jan.'25 W3 and Nov.'24 was "How closely are you following the news about Donald J. Trump becoming the President of the United States?" Question wording in Jan. '25 W4 was "How closely are you following the news about the relationship between Canada and the U.S. now that Donald J. Trump is becoming the President of the United States?"

Attitude Towards President Trump: About 2-in-3 say they are afraid about Trump's election as president; consistent with previous waves



Does Donald J. Trump's election as the US President leave you feeling [TA_P]?
 [asked of all respondents; n=1,500]

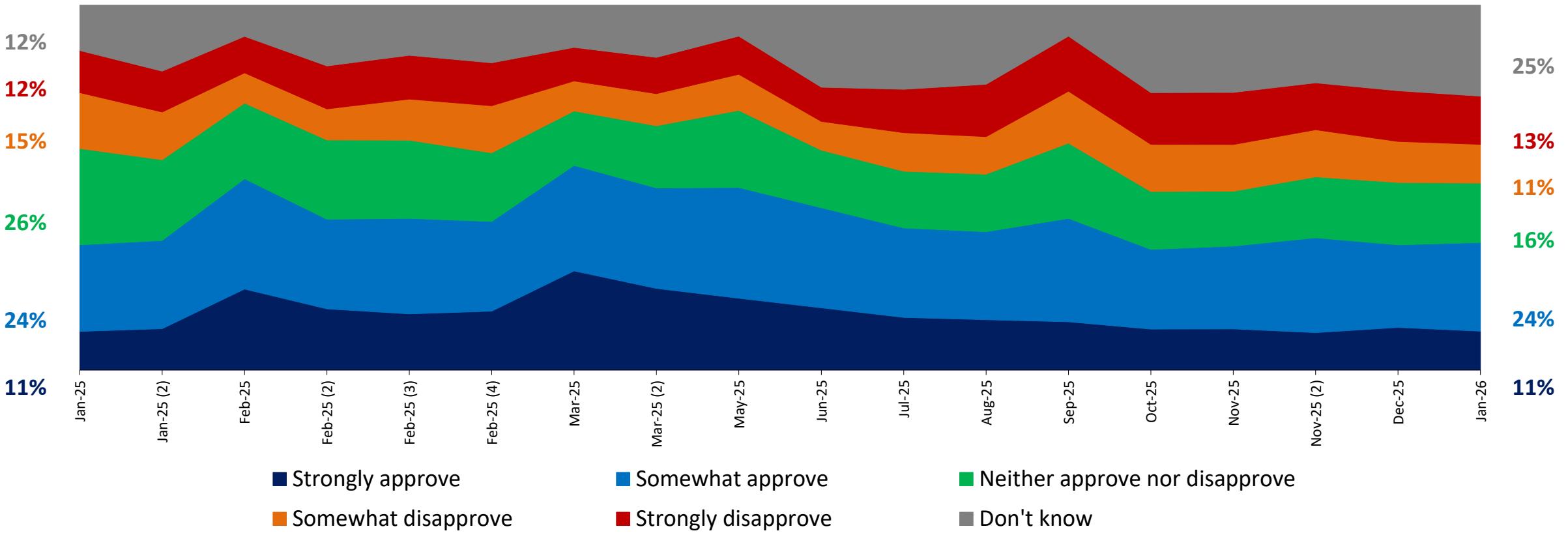


■ Very excited ■ Somewhat excited ■ A mix of excited and afraid ■ Somewhat afraid ■ Mostly afraid ■ Neither ■ Don't know

Federal Trump Response Approval: 35% say they approve of the way the fed. gov't is responding; consistent with Dec. wave but down since Mar.²⁰

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=1,500]

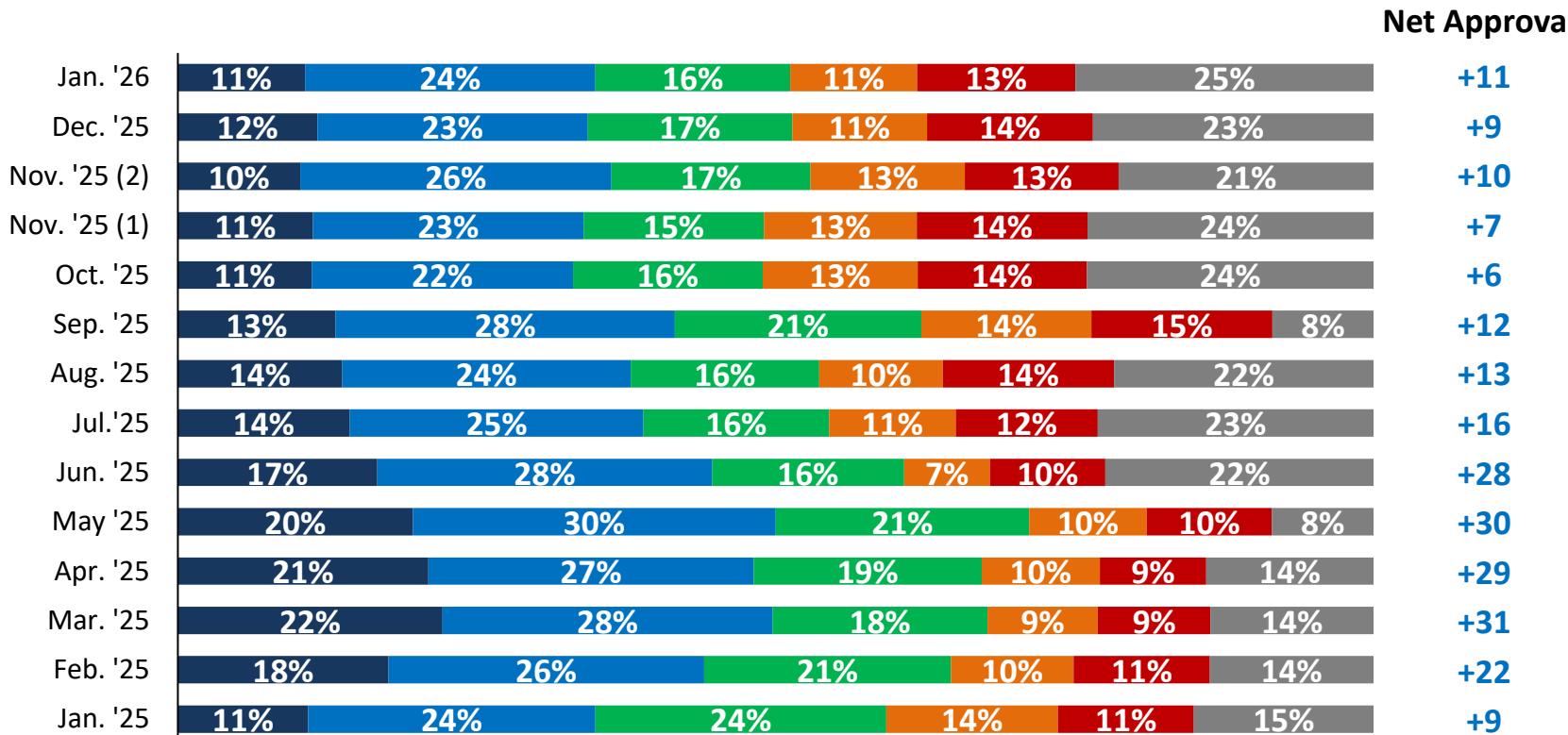


Federal Govt Approval: Net approval of the federal gov.'s Trump has slipped 18 points since April 2025, now at +11 points



Now thinking about the federal government, do you approve or disapprove of the way the Federal government is responding to issues resulting from Donald Trump's presidency?

[asked of all respondents; Jan. '26 n=1,500; Dec. '25 n=3,000; Oct. '25 n=2,500; Sep. '25 n=3,000; Aug. '25 n=3,000; Jul. '25 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]



█ Strongly approve
█ Neither approve nor disapprove
█ Strongly disapprove

█ Somewhat approve
█ Somewhat disapprove
█ Don't know

Segmentation Those who say 'Approve'

Gender



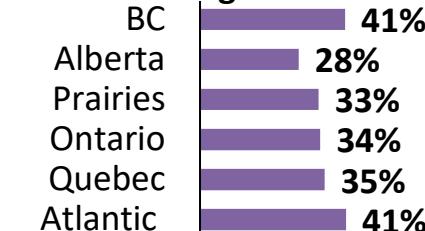
Age



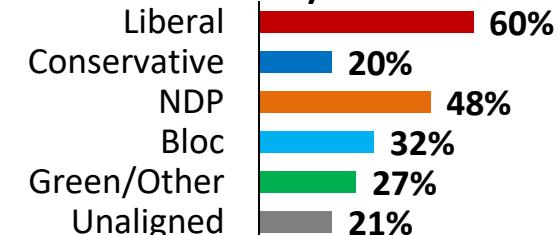
Economic Gap



Region



Party ID

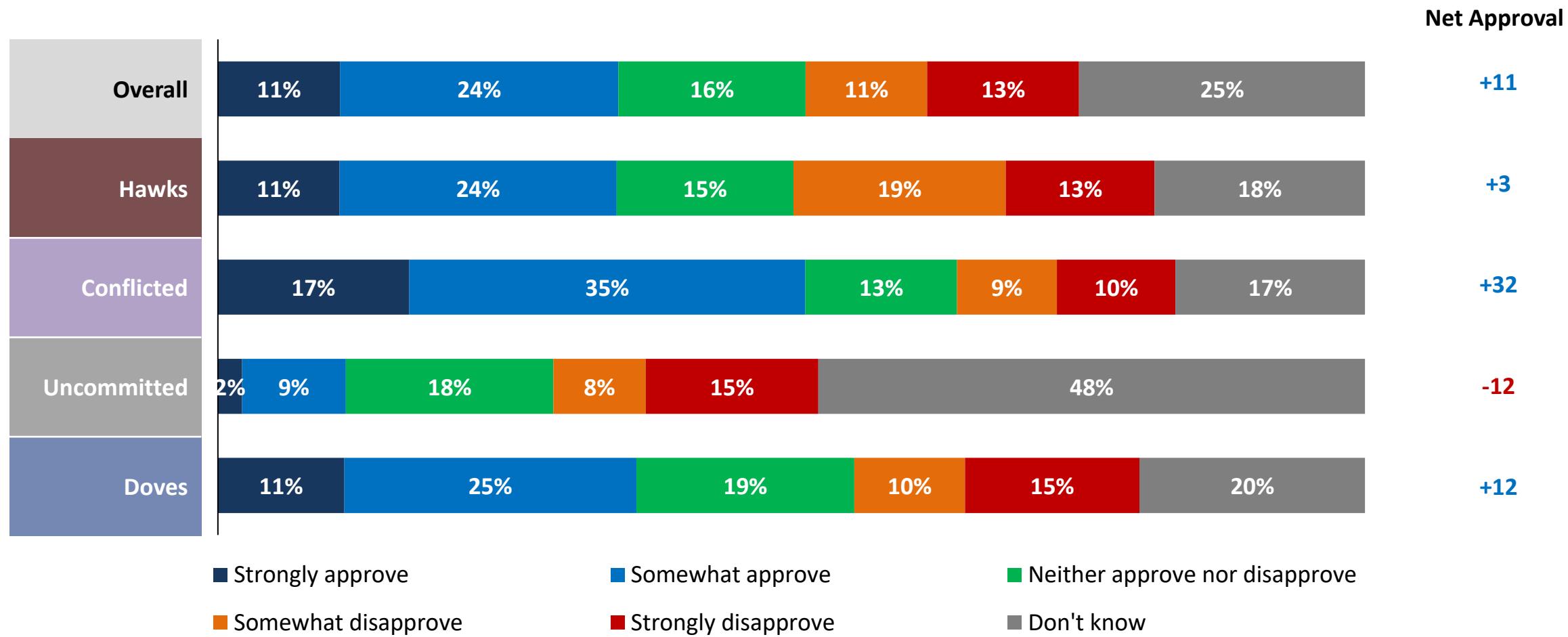


Federal Govt Approval: Net Approval is highest among Conflicted, lowest among Uncommitted, and only marginally positive among Hawks



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? **BY Stance Toward U.S. Cluster**

[asked of all respondents; Jan. '26 n=1,500; Dec. '25 n=3,000; Oct. '25 n=2,500; Sep. '25 n=3,000; Aug. '25 n=3,000; Jul. '25 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]

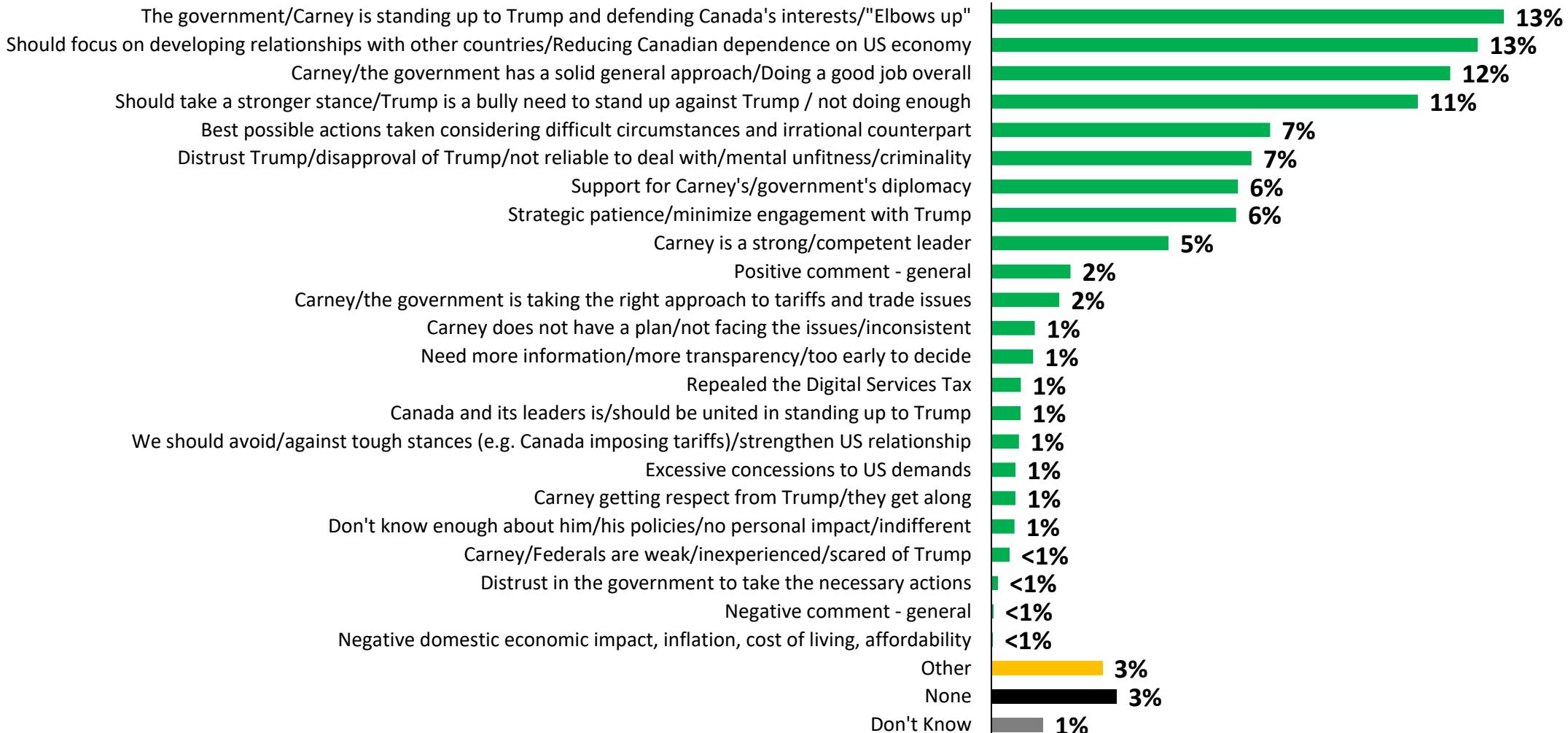


Federal Gov't Response to Trump's Presidency - Approve: Among those who approve, 13% say is because of the gov't standing up to Trump²³

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? [OPEN END]

[Asked of all respondents; Those who said approve; n=495]



Note: 'Bad respondent' (1%) not shown.

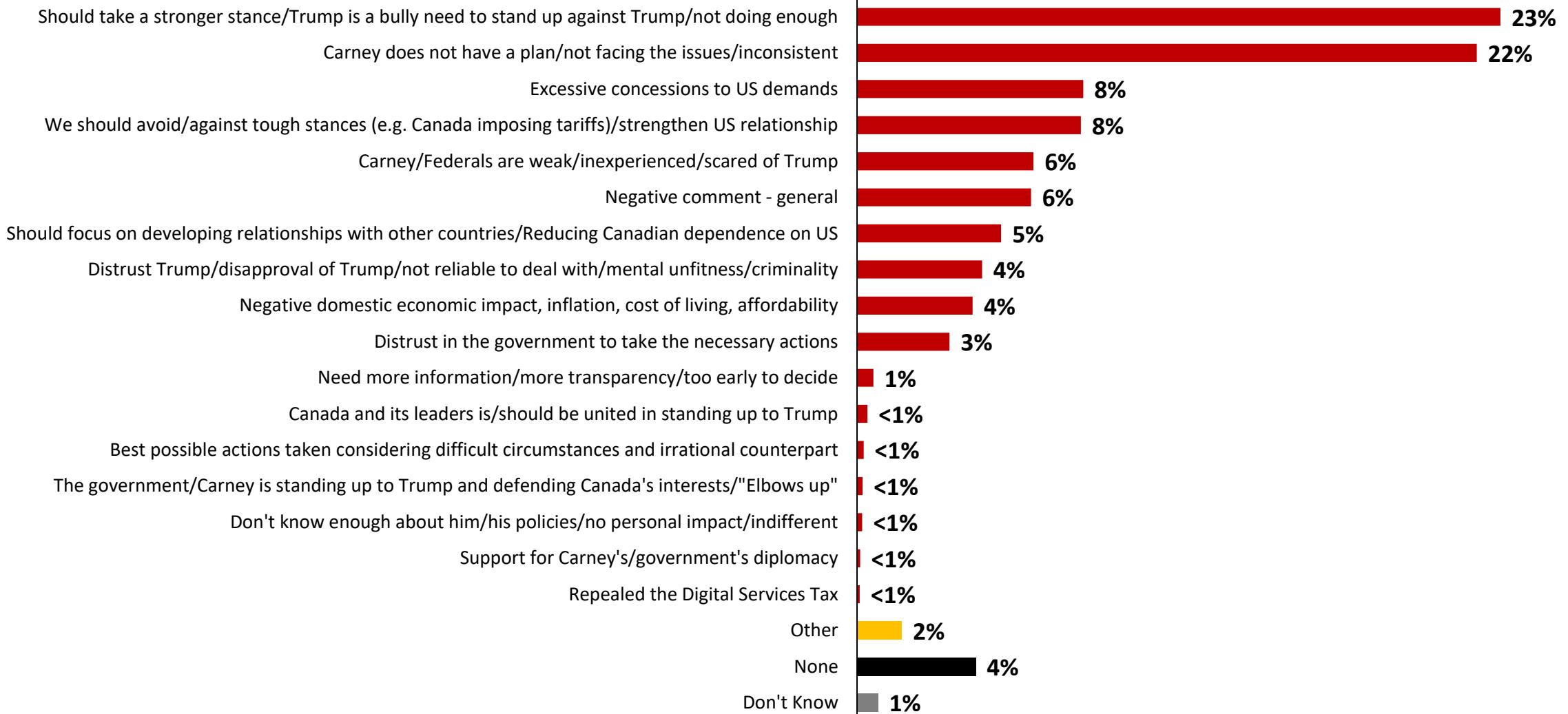
Note: Negative themes generally represent respondents explaining why they only "Somewhat" rather than "Strongly" approve.

Federal Gov't Response to Trump's Presidency – Disapprove: Out of those who disapprove, 23% think Carney 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? [OPEN END]

[Asked of all respondents; Those who said disapprove; n=339]



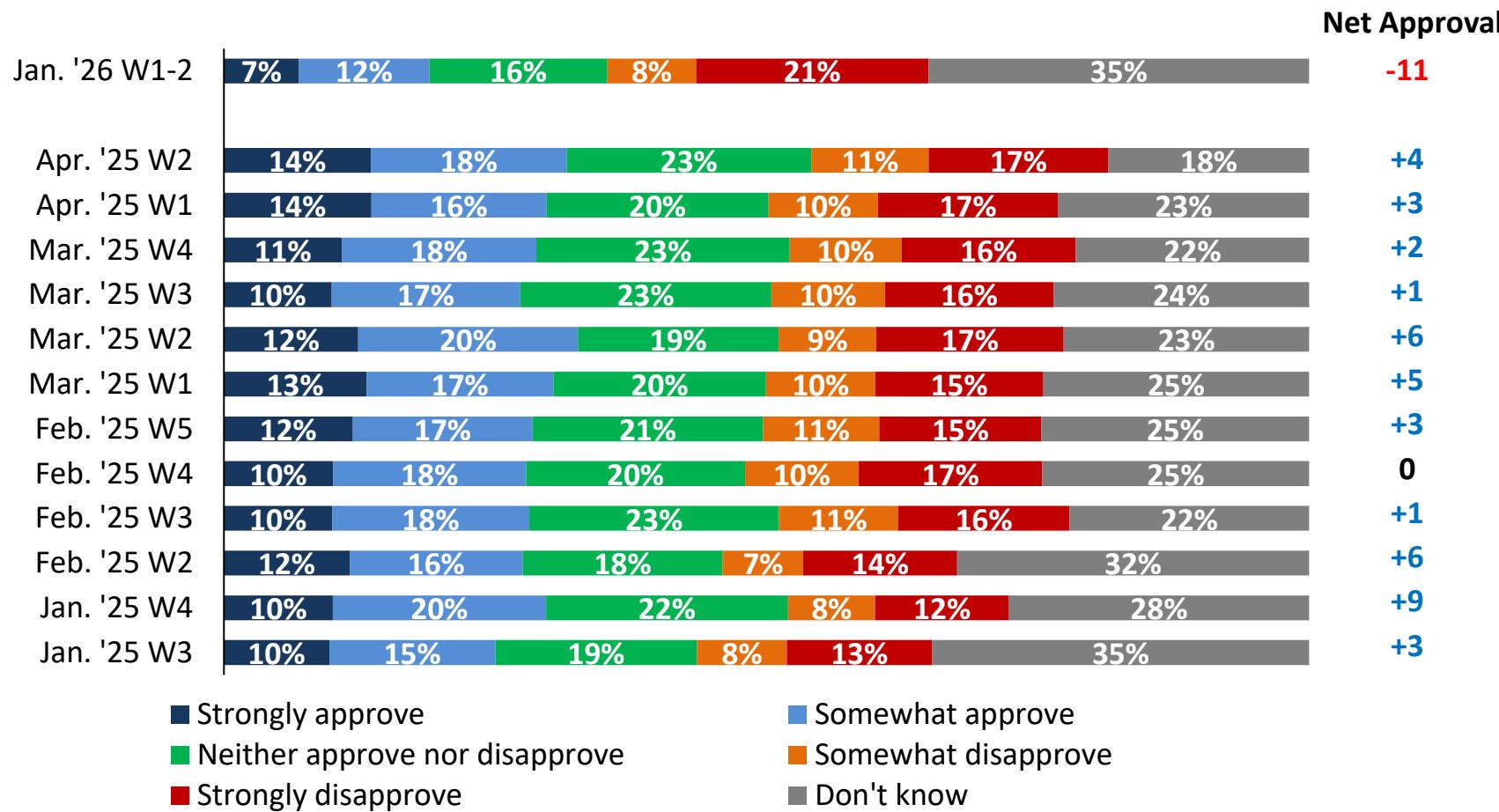
Note: 'Bad respondent' (1%) not shown.

Pierre Poilievre and the Conservatives' Approach: Canadians are net negative (-11) on the CPC's response to Trump, with uncertainty rising

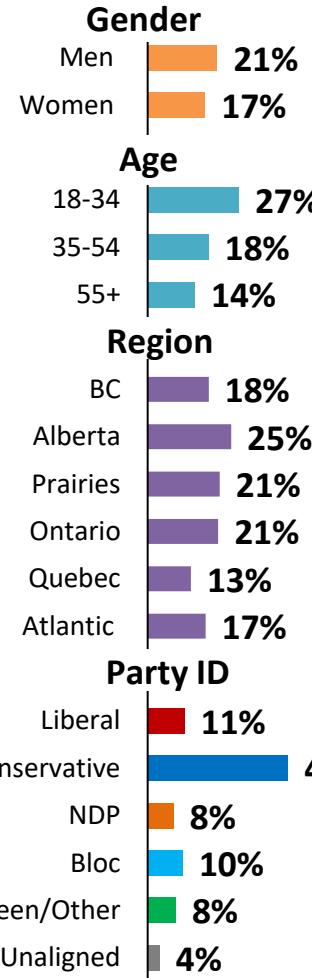
Q

Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency?

[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000; Mar. '25 W3 n=1,000; Mar. '25 W4 n=1,000; Apr. '25 W1 n=1,000; Apr. '25 W2 n=1,000; Jan. '26 W1-2 n=1,500]



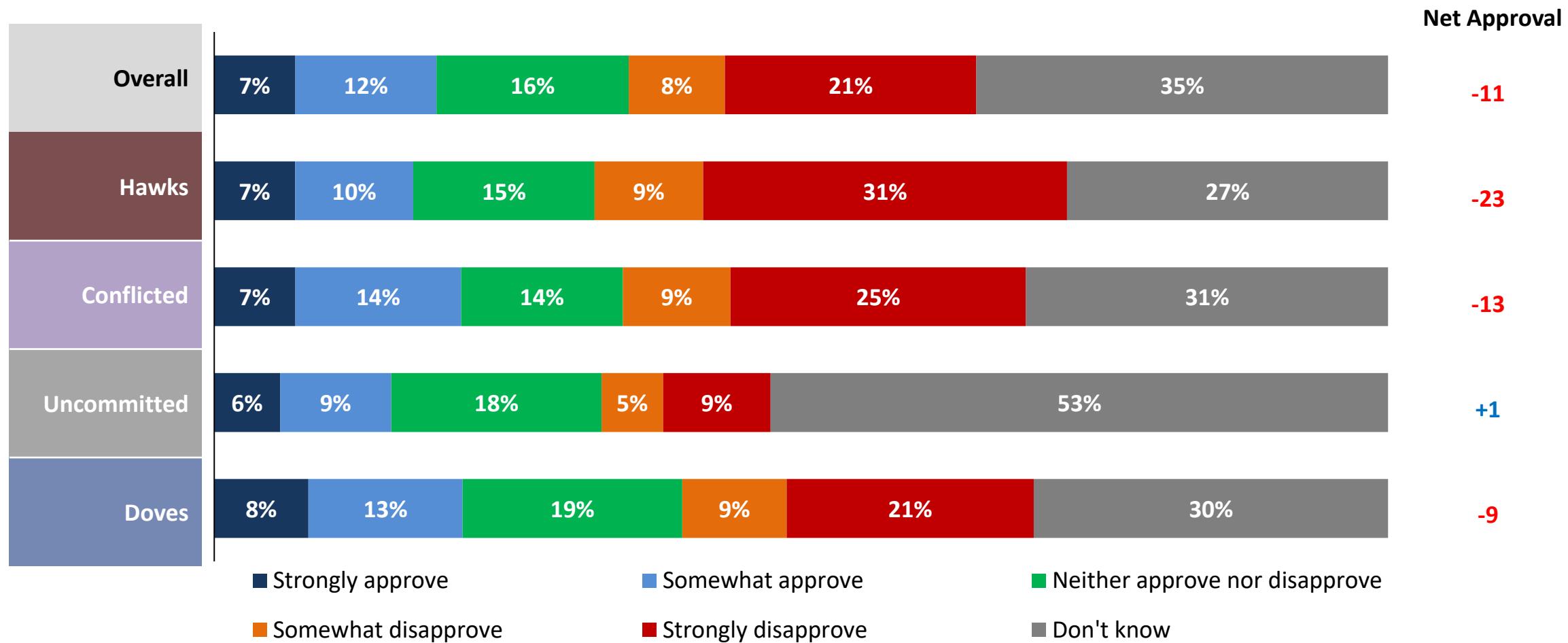
Segmentation
Those who say 'Approve'



Pierre Poilievre and the Cons.' Approach: Net Approval is negative across the board except among Uncommitted; lowest among Hawks



Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency? **BY Stance Toward U.S. Cluster**
 [Asked of all respondents; n=1,500]

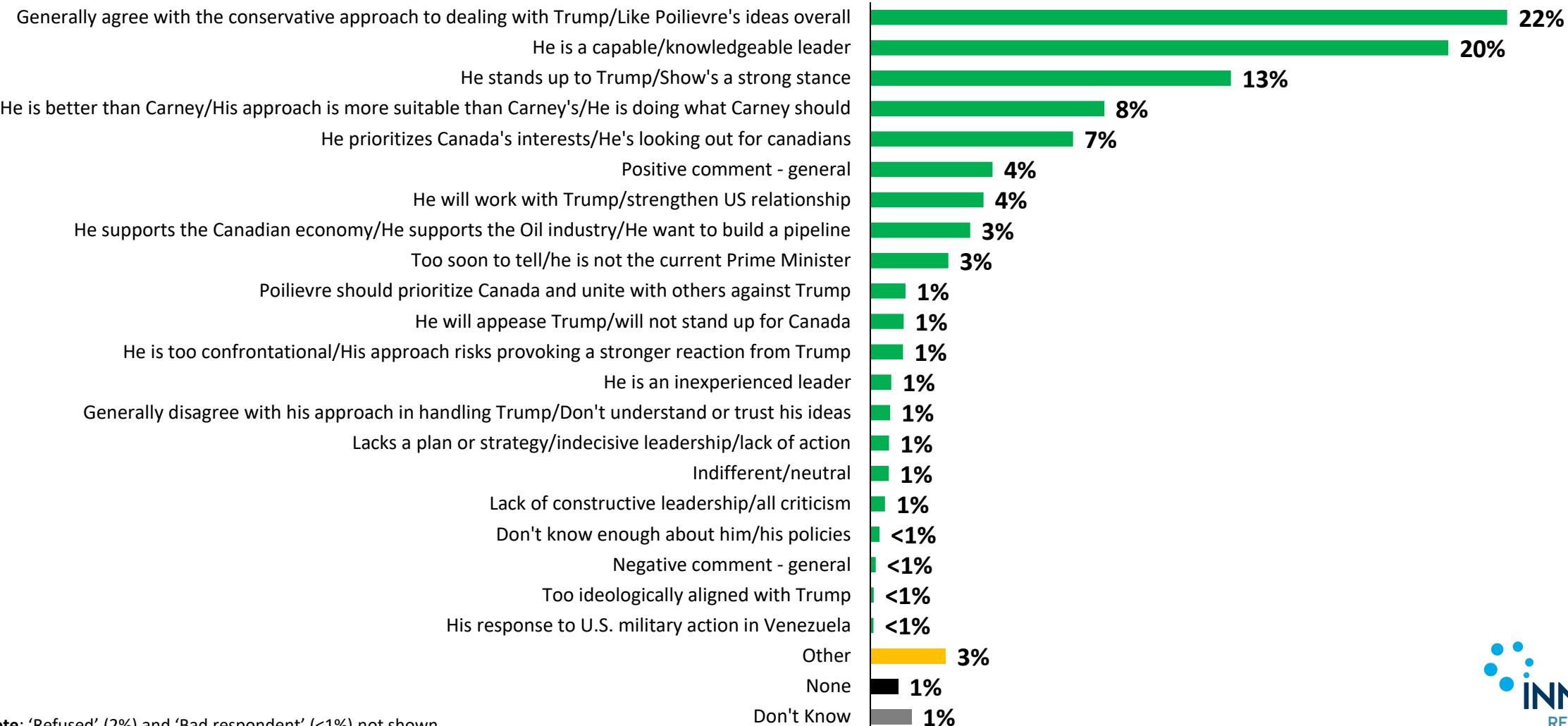


Poilievre/the Conservatives' Approach - Approve: 22% of those who approve agree with Poilievre's ideas overall; 20% say he's a capable leader

Q

Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency? And why do you say that? [OPEN END]

[Asked of all respondents; Those who said approve; n=263]



Note: 'Refused' (2%) and 'Bad respondent' (<1%) not shown.

Note: Negative themes generally represent respondents explaining why they only "Somewhat" rather than "Strongly" approve.

Poirievre/the Conservatives' Approach - Approve: Top words point to positive perceptions around leadership, capability, and strength

Q

Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency? And why do you say that? [OPEN END]

[Asked of all respondents; Those who said approve; n=263]

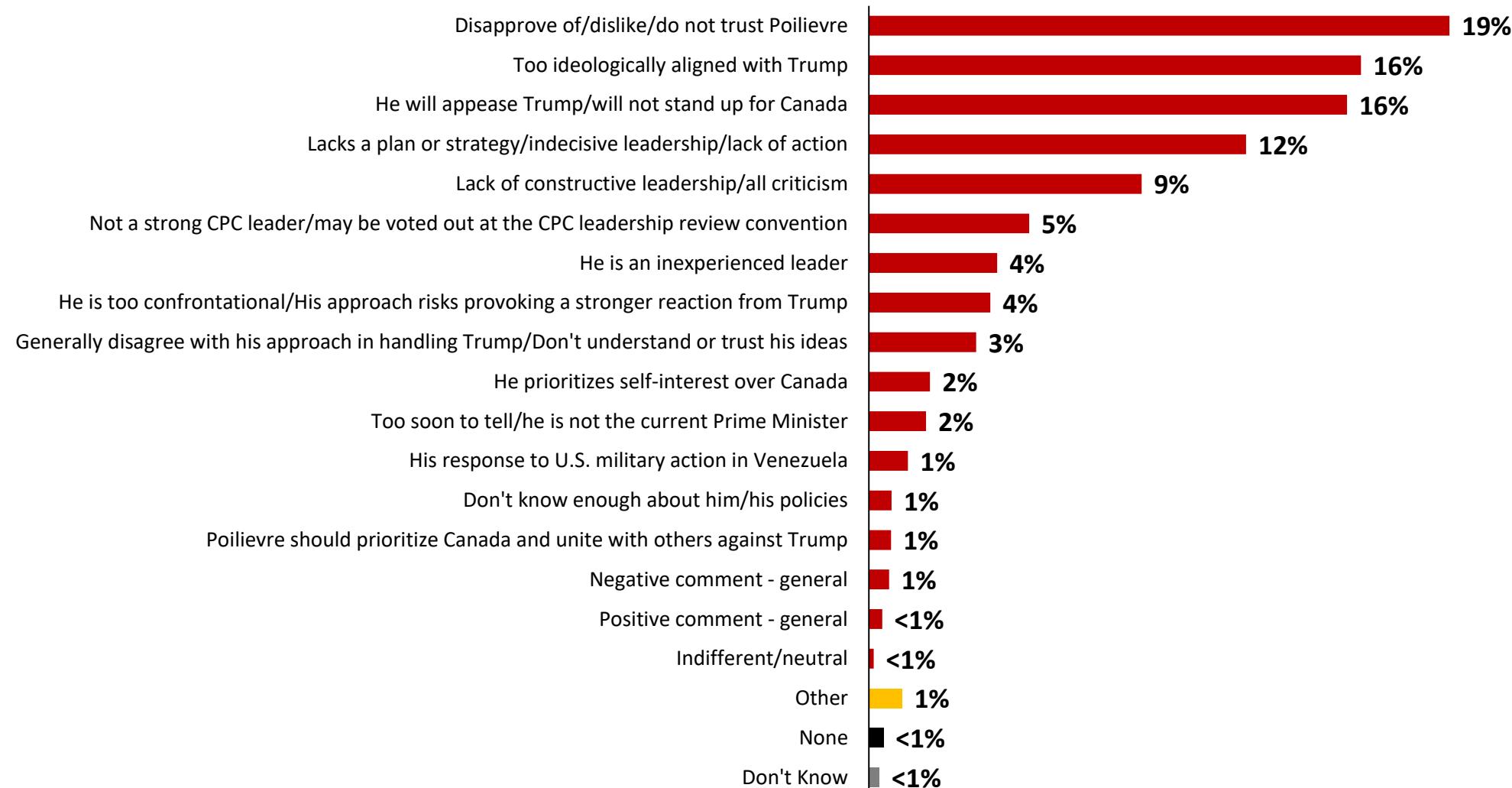


Poilievre/the Conservatives' Approach - Disapprove: Among those who disapprove, 19% cite a lack of trust in/disapproval of Poilievre²⁹

Q

Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency? And why do you say that? [OPEN END]

[Asked of all respondents; Those who said disapprove; n=424]



Poilievre/the Conservatives' Approach - Disapprove: Top words signal negative perceptions are related to harshness and weakness ³⁰

Q

Do you approve or disapprove of the way Pierre Poilievre and the Conservative Party is responding to issues resulting from Donald Trump's presidency? And why do you say that? [OPEN END]

[Asked of all respondents; Those who said disapprove; n=424]



**Best Leader for
Canada-US Relations**

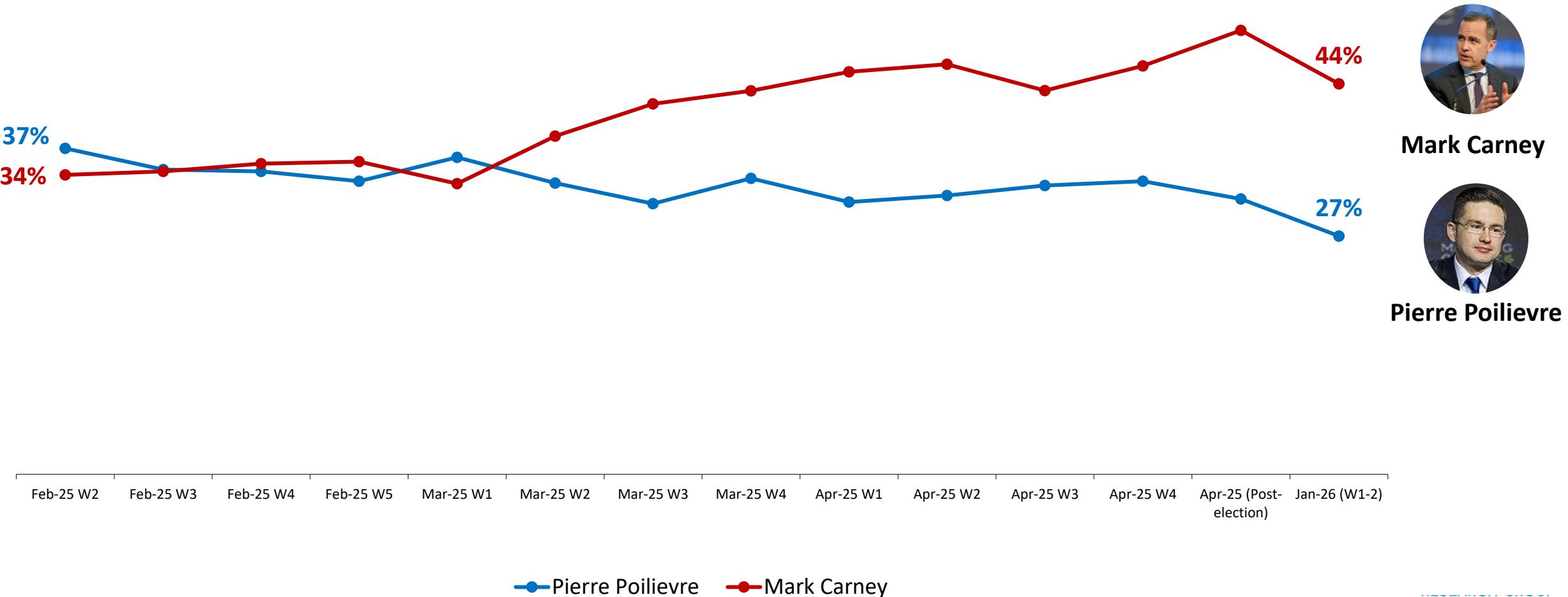
Best Leader for Canada-US Relations Tracking:

Carney 17-points ahead of Poilievre

Q

Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency?

[asked of all respondents, Feb. '25 W2, W3, W4, W5 each n=1,200; Mar. '25 W1, W2, W3, W4 each n=1,200; Apr. '25 W1, W2 each n=1,200; Apr. '25 W3 n=1,200, W4=2,000, W(post election) n=2,000]



Best Leader for Canada-US Relations:

Conflicted are more likely to say Carney is best equipped

Q

Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency? **BY Stance Toward U.S. Cluster**

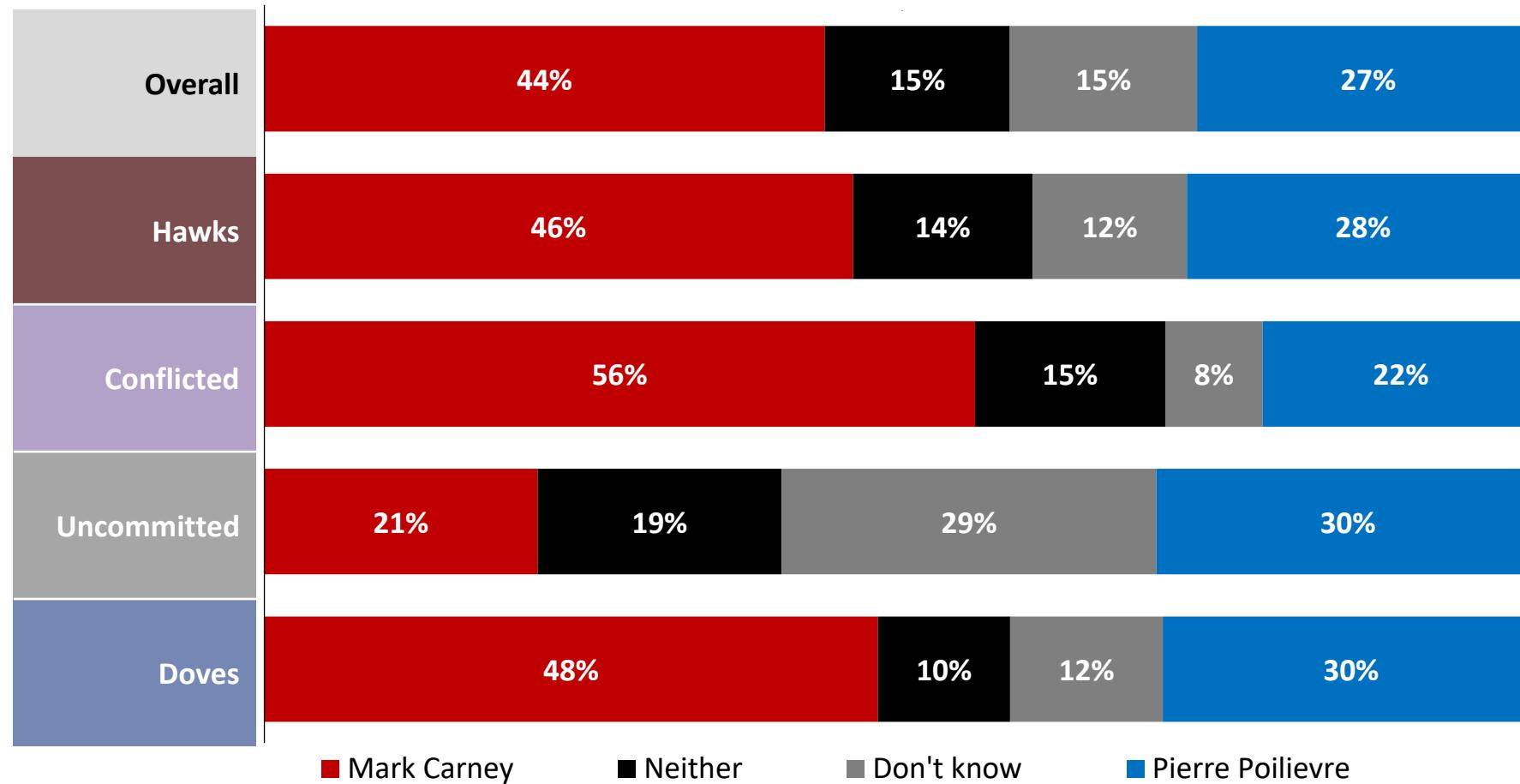
[Asked of all respondents; n=1,500]



Mark Carney



Pierre Poilievre



Best Leader for Canada-US Relations: Among those who are afraid, Carney is ahead of Poilievre by 40 pts on handling Canada-US relations

Q

Which of the following leaders do you believe is best equipped to handle Canada-US relations during Trump's renewed presidency? BY ATTITUDE TOWARDS TRUMP

[asked of all respondents, Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000; Mar. '25 W2 n=1,000; Jan. '26 W1-2 n=1,500]

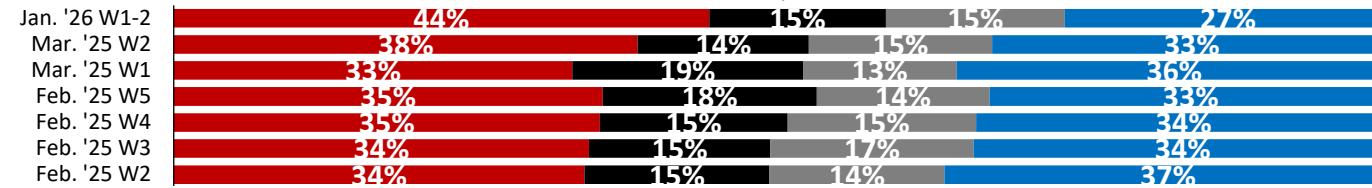


Mark Carney

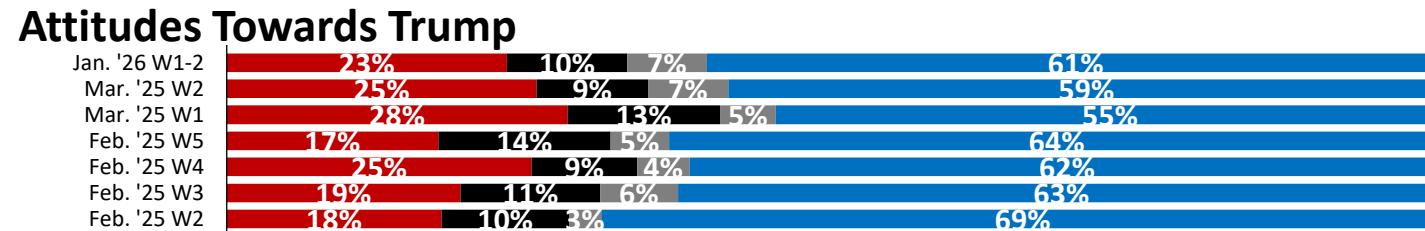


Pierre Poilievre

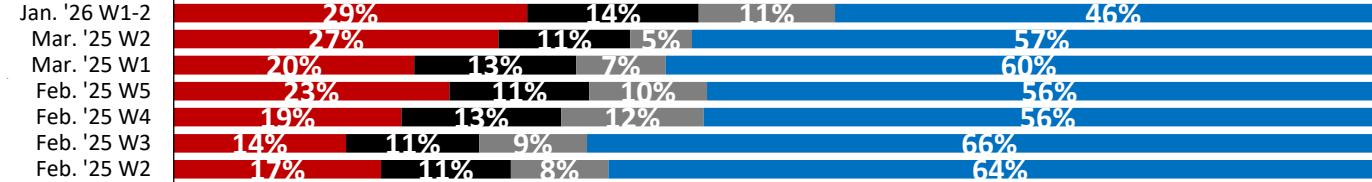
Overall



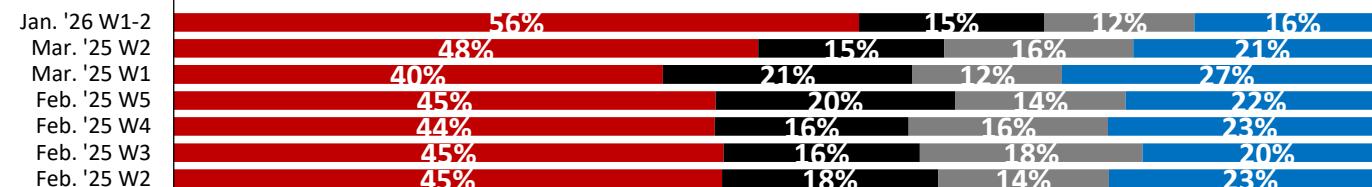
Excited



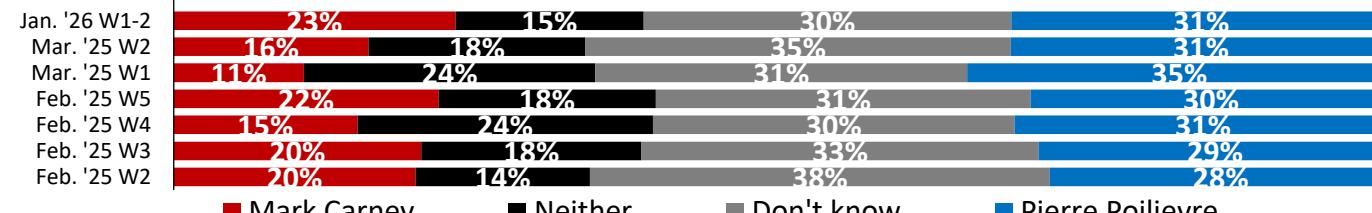
A mix of excited and afraid



Afraid



Neither/DK



■ Mark Carney

■ Neither

■ Don't know

■ Pierre Poilievre

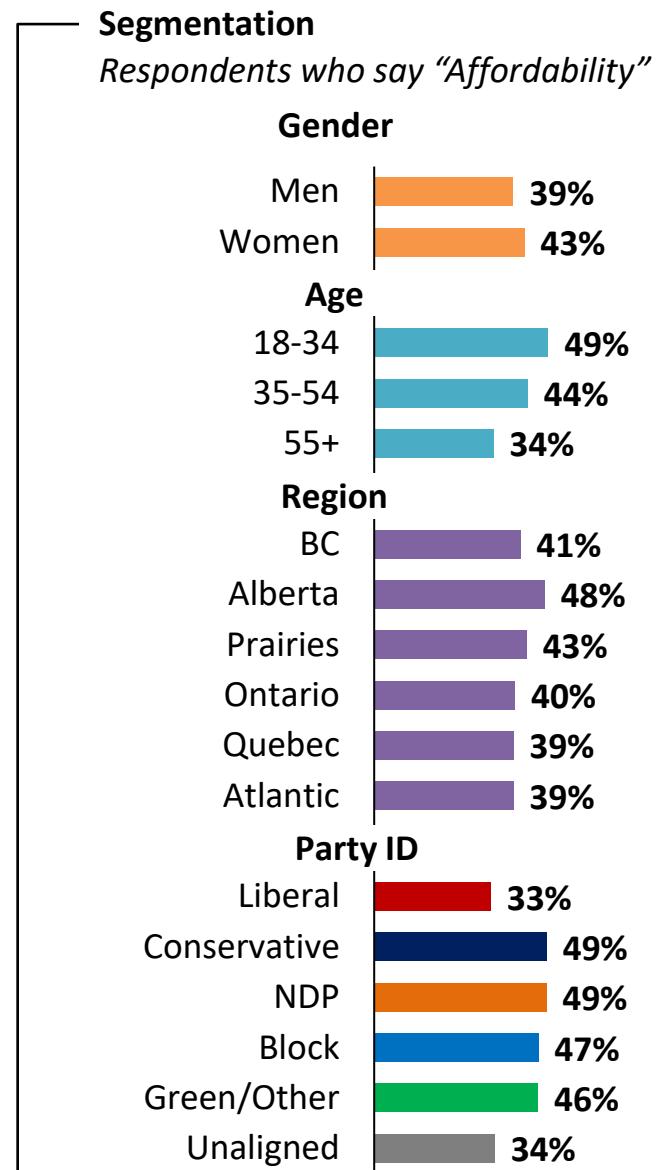
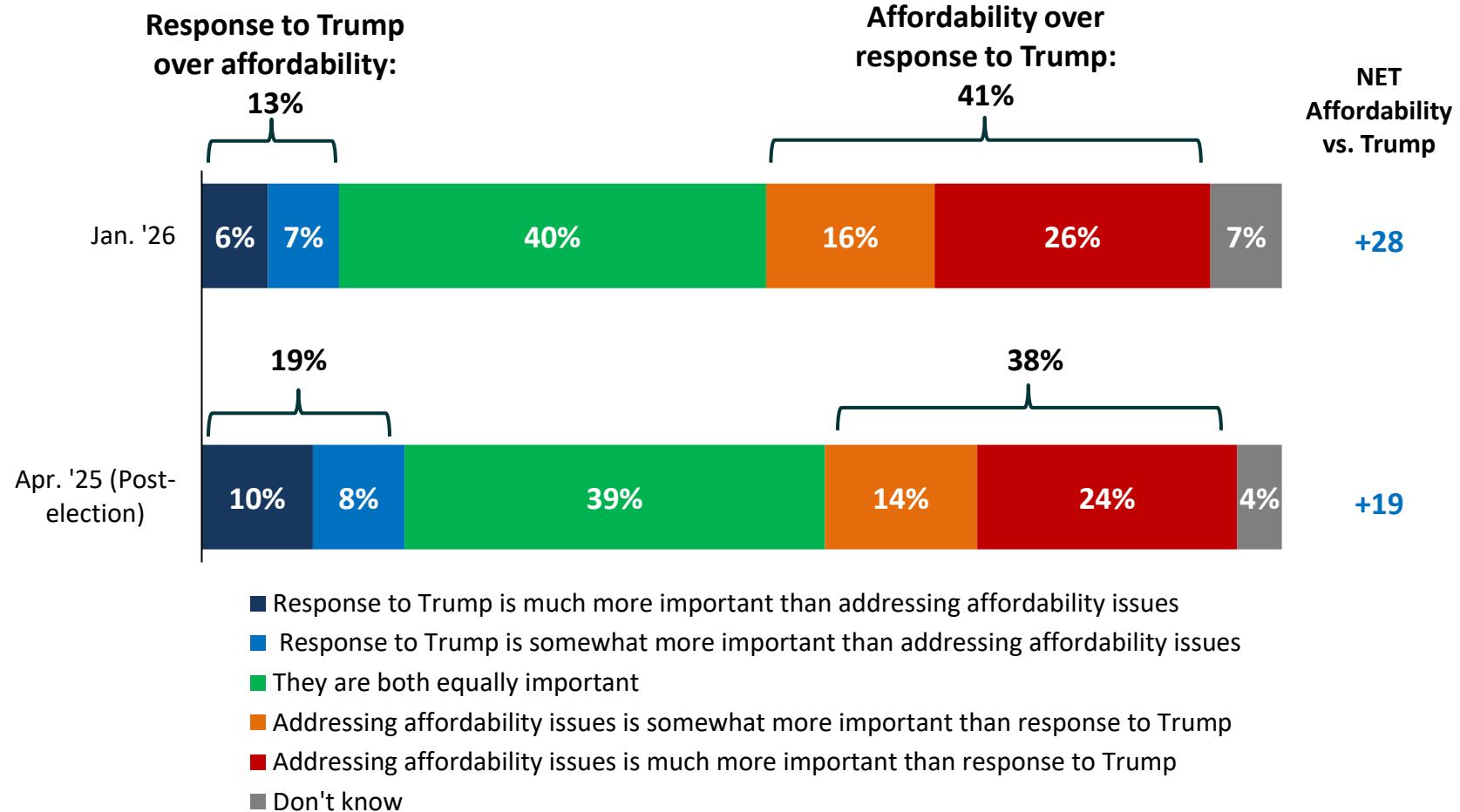
Issues & Priorities

U.S. Relations vs. Affordability: Net importance of affordability vs. Trump has increased by 9 points since post-election; now at +28

Q

In thinking about **federal politics**, when it comes to choosing the best party, what is more important to you? Managing Canada's response to Donald Trump OR Addressing affordability issues in housing and the cost of living.

[asked of all respondents; Apr. '25 n=2,000; Jan. '26 n=1,500]

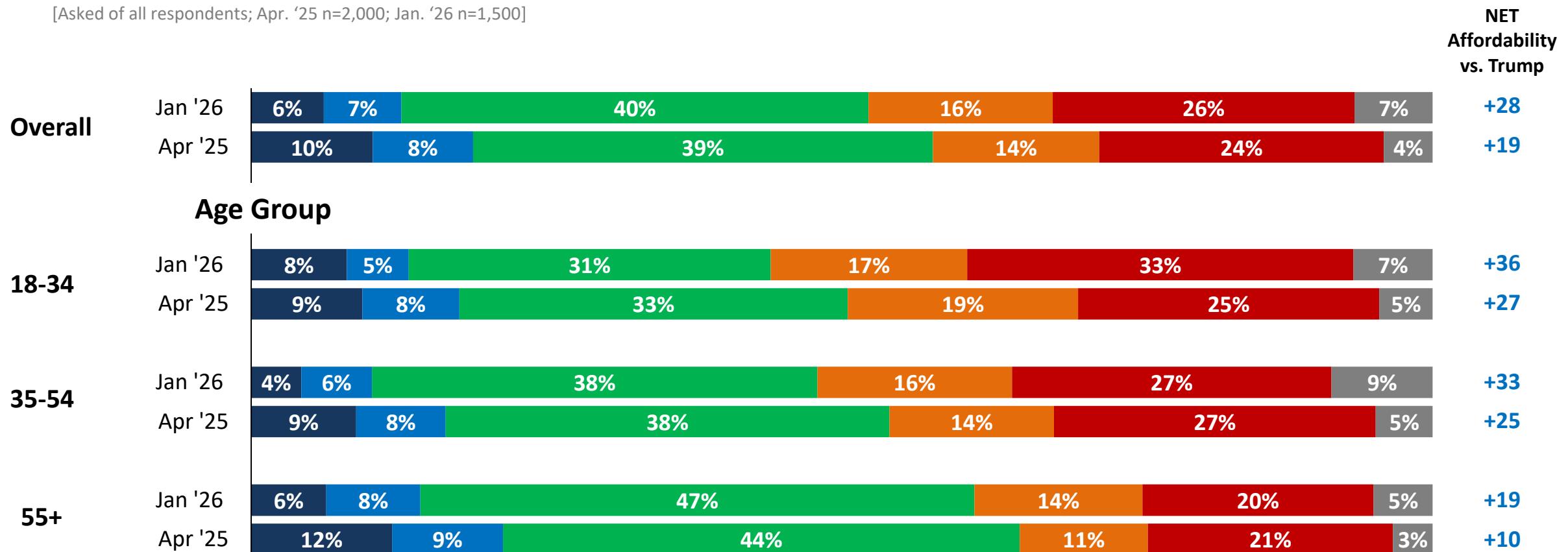


U.S. Relations vs. Affordability: The increase in affordability's relative importance relative to Trump is consistent across age segments

Q

In thinking about **federal politics**, when it comes to choosing the best party, what is more important to you? Managing Canada's response to Donald Trump OR Addressing affordability issues in housing and the cost of living **BY Age**

[Asked of all respondents; Apr. '25 n=2,000; Jan. '26 n=1,500]



- Response to Trump is much more important than addressing affordability issues
- They are both equally important
- Addressing affordability issues is much more important than response to Trump

- Response to Trump is somewhat more important than addressing affordability issues
- Addressing affordability issues is somewhat more important than response to Trump
- Don't know

U.S. Relations vs. Affordability: Those who prioritize Trump more likely to vote Liberal; Those who prioritize affordability, Conservative

Q

Decided Vote BY In thinking about this election, when it comes to choosing the best party, what is more important to you?

Managing Canada's response to Donald Trump OR Addressing affordability issues in housing and the cost of living.

[only decided voters; n=1,305]

| Column % | Response to Trump is much more important than addressing affordability issues (n=89) | Response to Trump is somewhat more important than addressing affordability issues (n=92) | They are both equally important (n=531) | Addressing affordability issues is somewhat more important response to Trump (n=214) | Addressing affordability issues is much more important than response to Trump (n=336) |
|----------------------------|--|--|---|--|---|
| Jan '26 | | | | | |
| Conservative | 41% | 28% | 33% | 39% | 51% |
| Liberal | 51% | 50% | 49% | 37% | 26% |
| NDP | 4% | 9% | 9% | 11% | 10% |
| Bloc | 3% | 6% | 6% | 8% | 6% |
| Other | 1% | 7% | 4% | 5% | 7% |
| | (n=197) | (n=157) | (n=676) | (n=238) | (n=397) |
| Apr '25 (Post-election) | | | | | |
| Conservative | 23% | 25% | 33% | 54% | 59% |
| Liberal | 62% | 64% | 49% | 33% | 26% |
| NDP | 6% | 5% | 8% | 6% | 6% |
| Bloc | 6% | 3% | 8% | 4% | 6% |
| Other | 2% | 2% | 3% | 3% | 3% |

Methodology

Survey Methodology – National



These are the results of an online survey conducted between January 02, 2026, and January 13, 2026.

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= 2,249 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: January 02, 2026, to January 13, 2026

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data, in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

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

| | Unweighted (n) | Unweighted (%) | Weighted (n) | Weighted (%) |
|-------------------------|-------------------|-------------------|-----------------|-----------------|
| Men 18-34 | 242 | 10.8% | 203 | 13.6% |
| Men 35-54 | 358 | 16% | 237 | 15.9% |
| Men 55+ | 507 | 22.6% | 287 | 19.2% |
| Women 18-34 | 234 | 10.5% | 196 | 13.1% |
| Women 35-54 | 391 | 17.5% | 249 | 16.7% |
| Women 55+ | 507 | 22.6% | 320 | 21.4% |
| | | | | |
| British Columbia | 332 | 14.8% | 208 | 13.9% |
| Alberta | 282 | 12.5% | 166 | 11.1% |
| Prairies | 170 | 7.6% | 100 | 6.7% |
| Ontario | 783 | 34.8% | 579 | 38.6% |
| Québec | 520 | 23.1% | 345 | 23% |
| Atlantic | 162 | 7.2% | 101 | 6.7% |

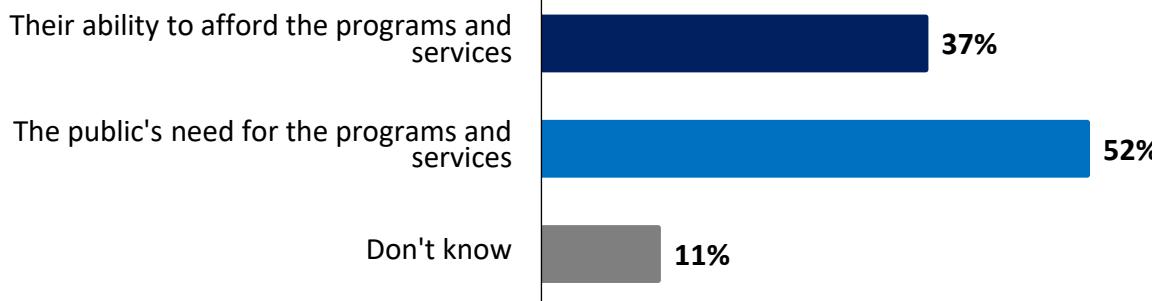
Appendices

Value Clusters

Core Political Values: Over half (52%) believe government should base spending decisions on public need for programs and services

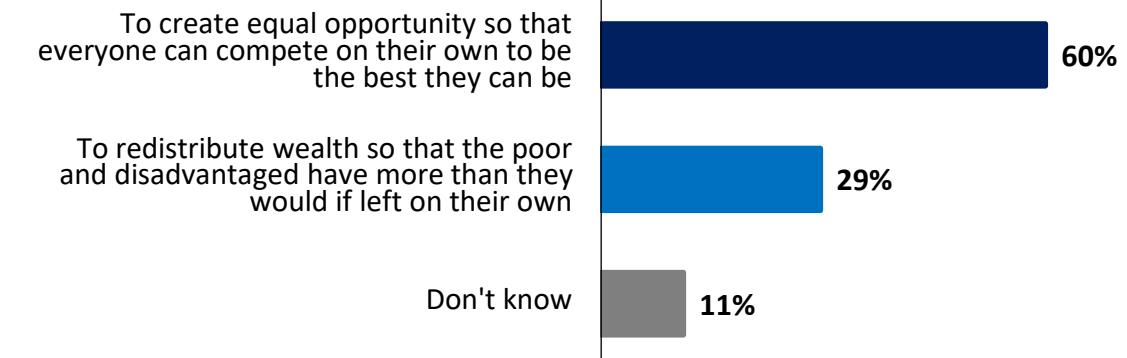
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?

[asked of all respondents; n=1,500]



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

[asked of all respondents; n=1,500]



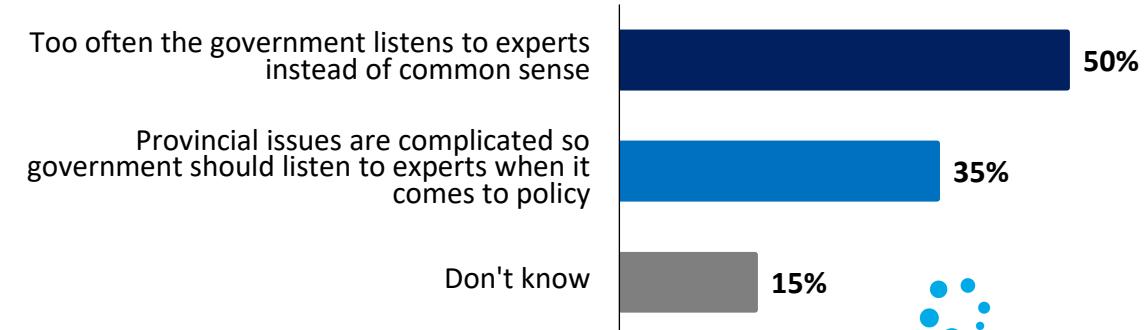
Q Which of the following statements comes closest to your view?

[asked of all respondents; n=1,500]



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

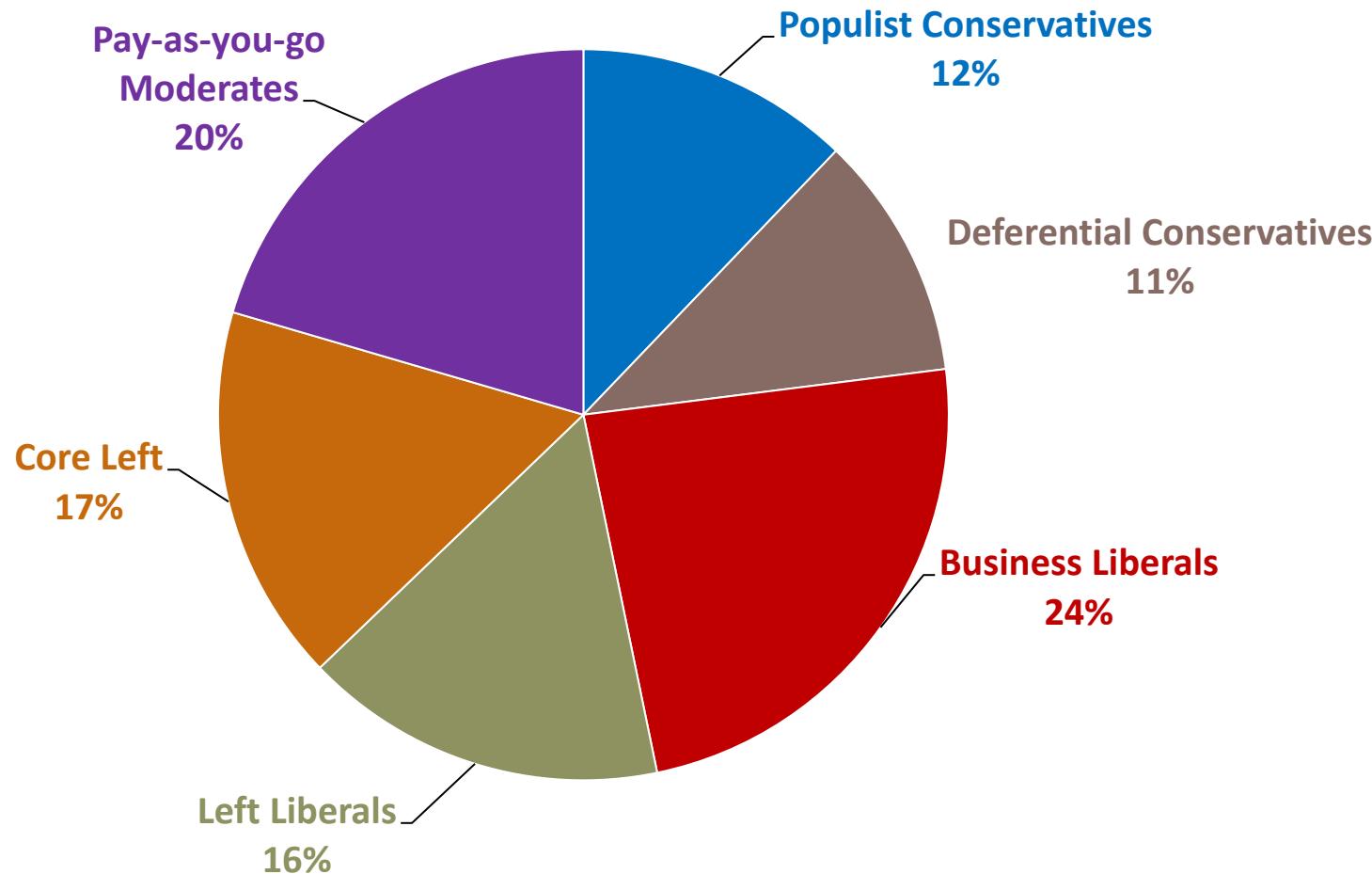
[asked of all respondents; n=1,500]



Value Clusters: A plurality of Canadians are Business Liberals (24%), followed by PAYG Moderates (20%) and the Core Left (17%)

Q

Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.
[asked of all respondents; n=1,500]



Defining Value Clusters: About 90% of both Liberal and Core Left Canadians believe government decisions should be public-need based

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 | 96% | 89% | 0% | 0% | 0% | 75% |
| | Public Need | 0% | 0% | 96% | 89% | 90% | 0% |
| Is the main role of government to...? | Create equal opportunity | 99% | 75% | 68% | 96% | 0% | 39% |
| | Redistribute wealth | 0% | 20% | 23% | 0% | 93% | 31% |
| When it comes to government decision making... | Rely on common sense | 100% | 0% | 45% | 58% | 42% | 51% |
| | Listen to experts | 0% | 87% | 43% | 26% | 45% | 20% |
| The profit system... | Brings out the worst in human nature | 0% | 0% | 0% | 84% | 85% | 64% |
| | Teaches value of hard work and success | 94% | 92% | 90% | 0% | 0% | 8% |

Note: Current data: January 2026

Economic Gap

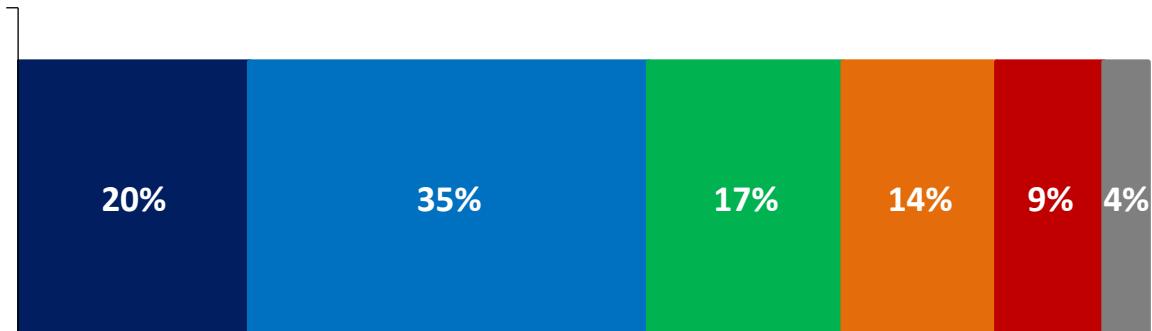
Segmentation Attitudes: Majority of Canadians (56%) believe they can⁴⁷ be anything they want in their province if they work for it



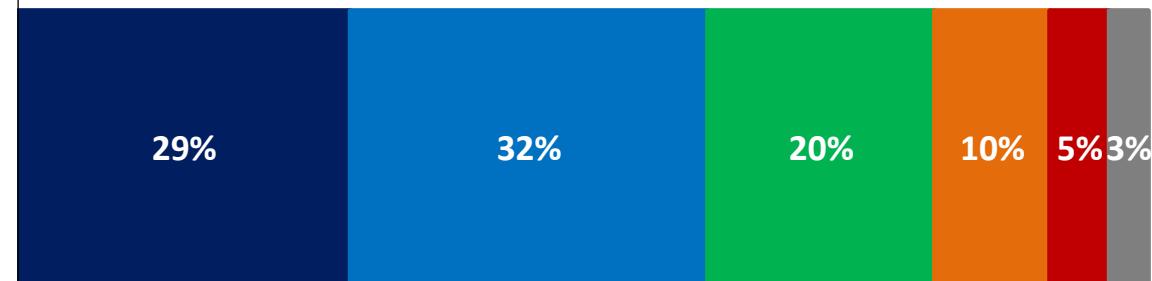
Do you agree or disagree with the following statements? -

[asked of all respondents; n=1,500]

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

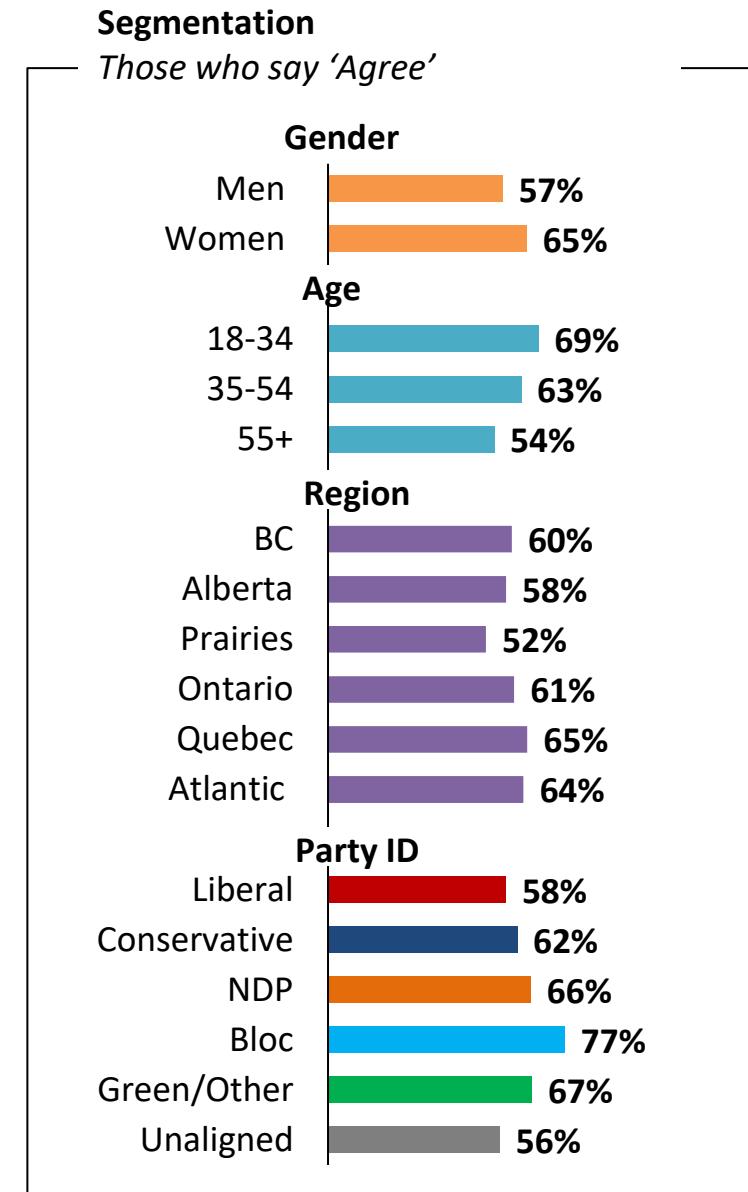
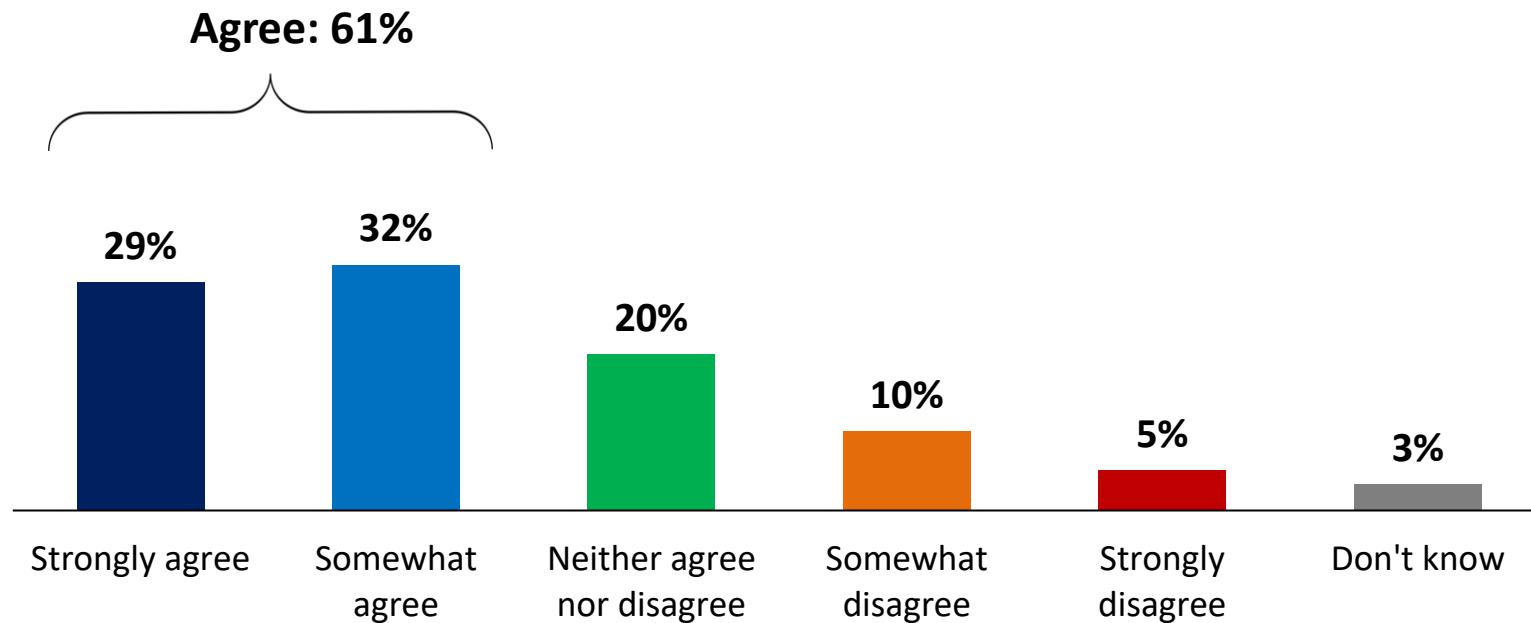
Don't know

Economic Gap Segmentation Attitudes: About 2-in-3 agree that, no matter how hard they work, it is becoming more difficult to get by



Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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

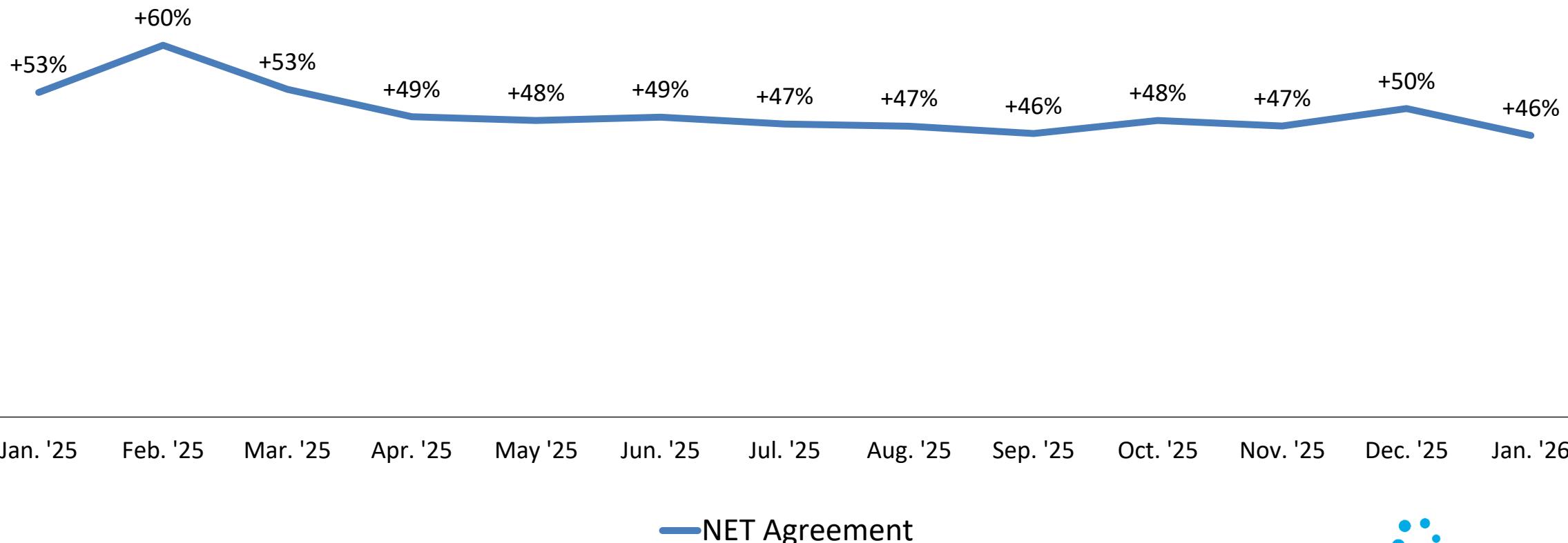


Segmentation Attitudes: Net agreement that getting by is becoming more difficult declines to September levels (+46%)



Do you agree or disagree with the following statements?
[asked of all respondents; n=1,500]

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

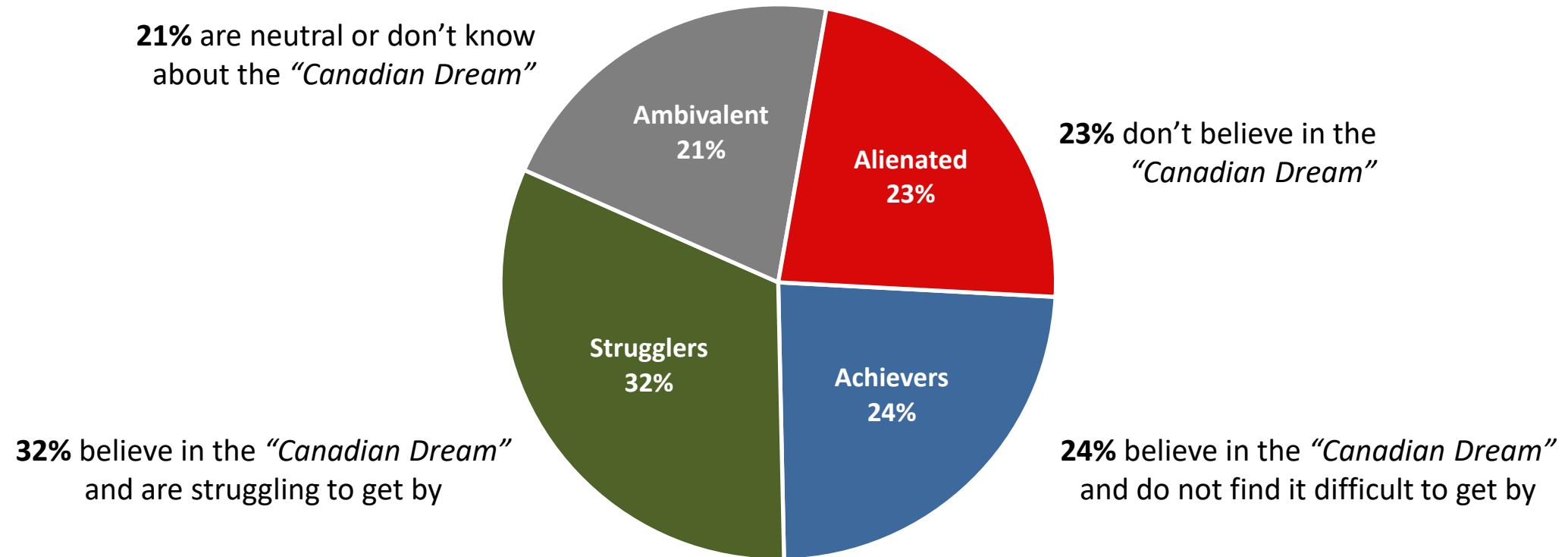


—NET Agreement

Economic Gap Segmentation: Most Canadians are in Strugglers segment¹⁰ (32%), followed by those who are Achievers (24%)

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=1,500]



Decided Vote by Economic Gap: Achievers and strugglers are split between Conservative and Liberal

51

| | Economic Gap | | | |
|--------------|--------------|------------|------------|-----------|
| | Achievers | Strugglers | Ambivalent | Alienated |
| | (n=331) | (n=444) | (n=232) | (n=299) |
| Conservative | 42% | 40% | 38% | 34% |
| Liberal | 45% | 38% | 43% | 39% |
| NDP | 6% | 8% | 8% | 16% |
| Bloc | 4% | 10% | 6% | 4% |
| Green | 1% | 4% | 4% | 4% |
| Other | 2% | 1% | 2% | 3% |

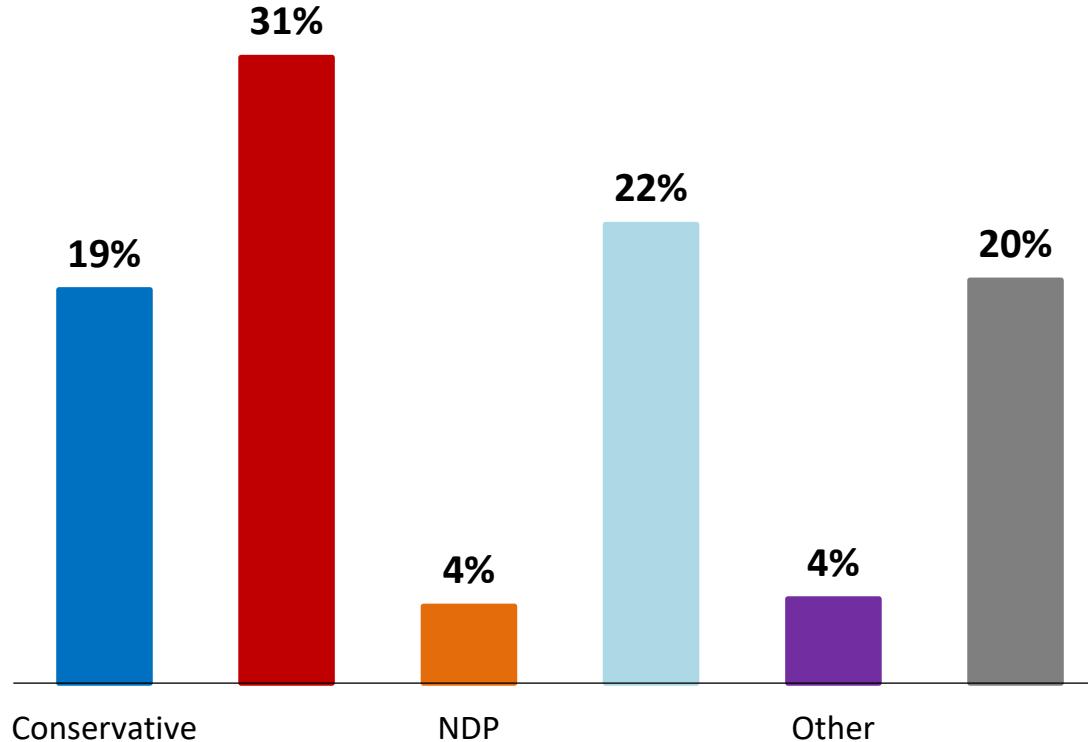
Note: Current data: January 2026

Party ID

Federal Party ID (Quebec vs. ROC): Those in Quebec are more likely to identify as Liberal (31%) than those in the Rest of Canada (27%)⁵³

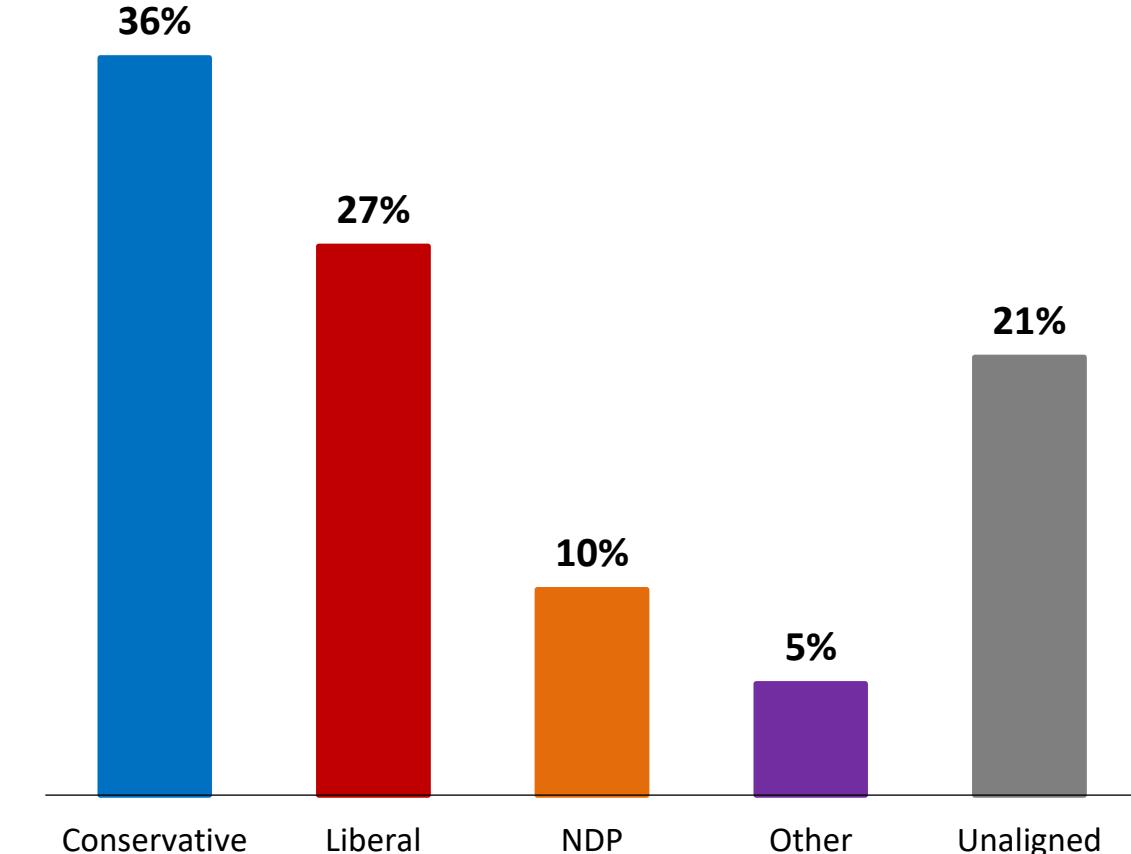
Party ID: Quebec

[Respondents in Quebec; n=345]



Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1,155]

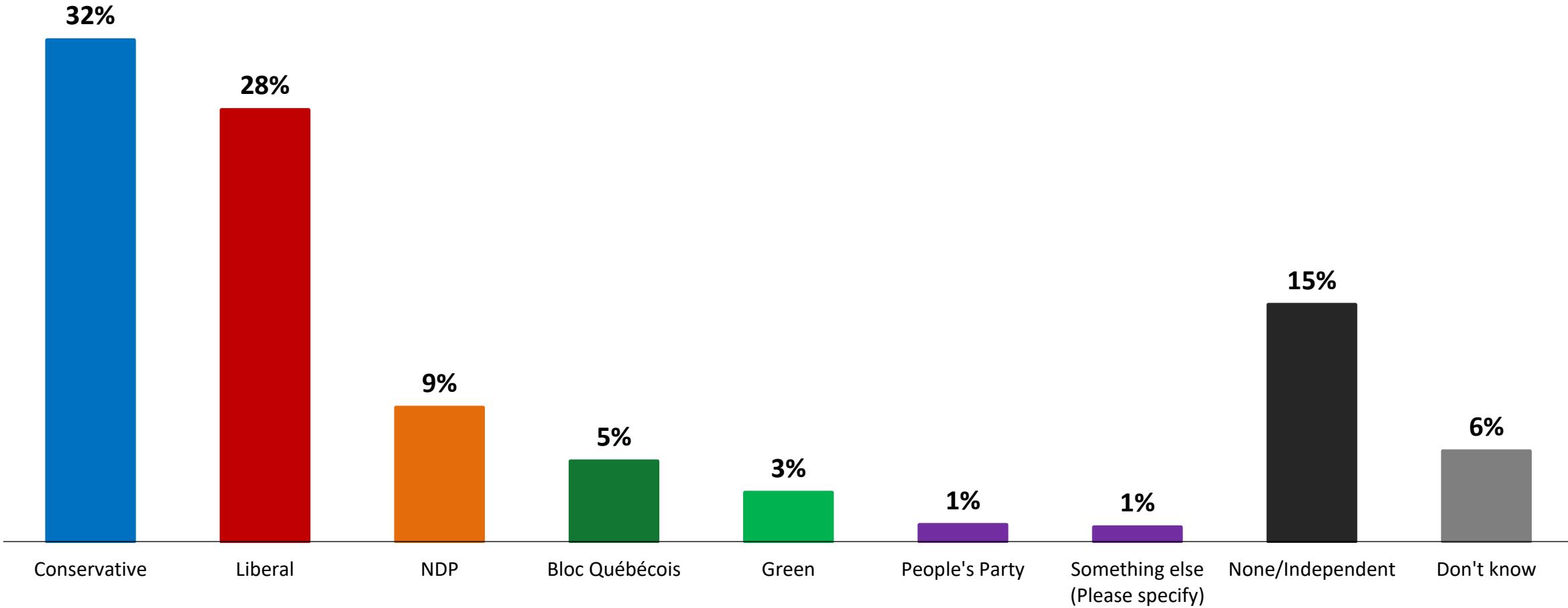


Federal Party ID: A plurality of Canadians (31%) identify themselves as ⁵⁴ Conservative and hold a 4-point lead on Liberals (28%)



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

[asked of all respondents; n=1,500]

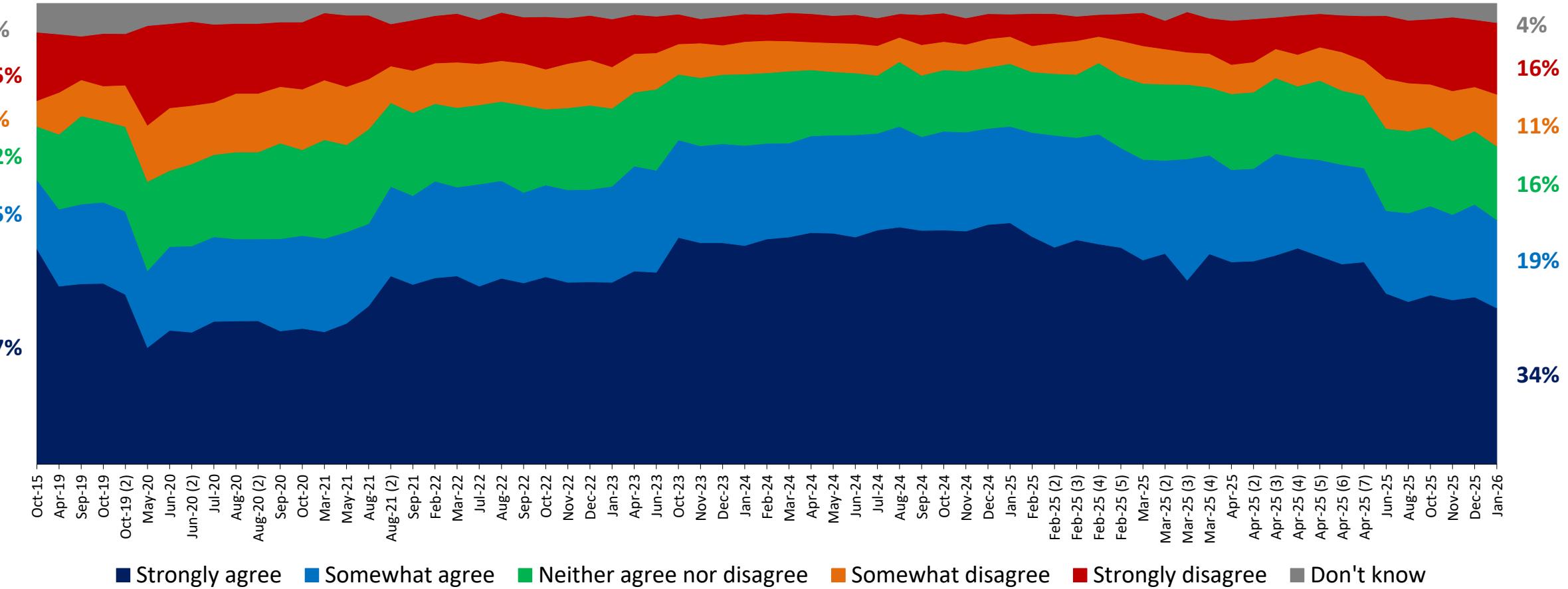


Time For Change

Time for Change Tracking: Agreement that it's time for government change remains steady after dip in April 2025

Q

Do you agree or disagree with the following statements? - It is time for a change in government here in Canada
 [asked of all respondents; n=1,500]

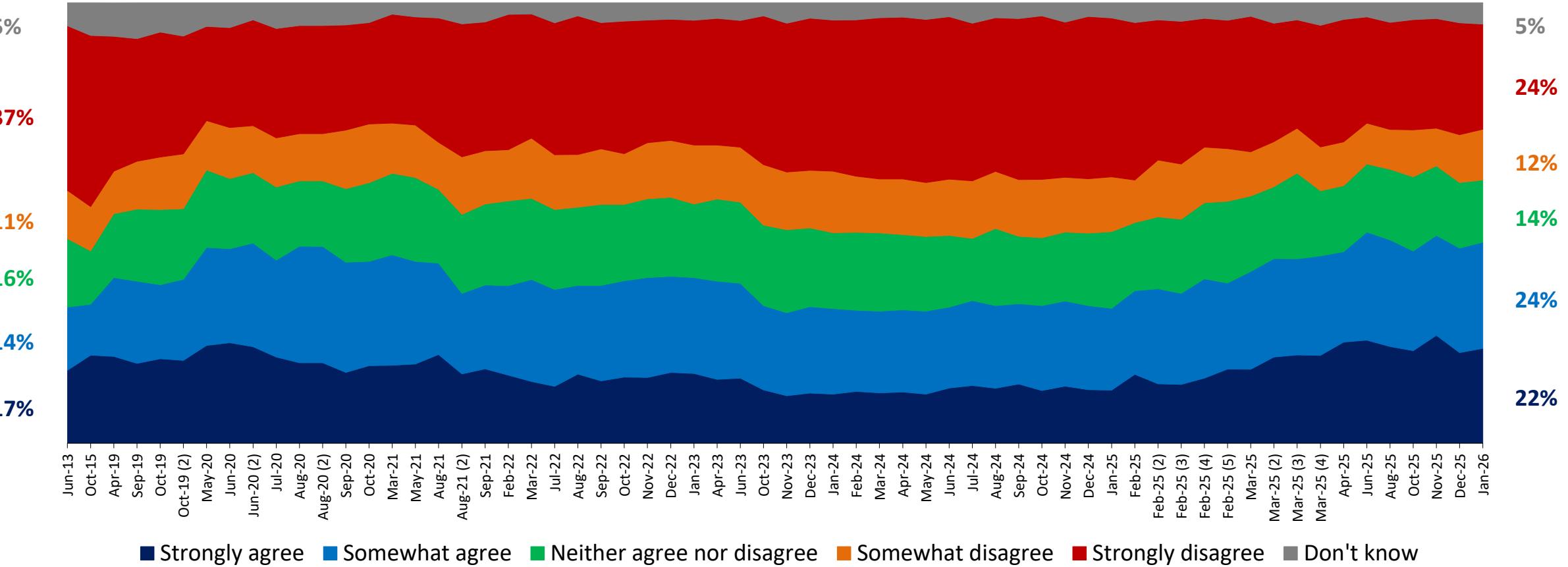


Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree Don't know

Time for Change Tracking: Agreement that Liberal is the best party for Canada has remained steady since June'25, now at 46%

Q

Do you agree or disagree with the following statements? - The Liberals may have their problems but they are still the best party to form government
 [asked of all respondents; n=1,500]

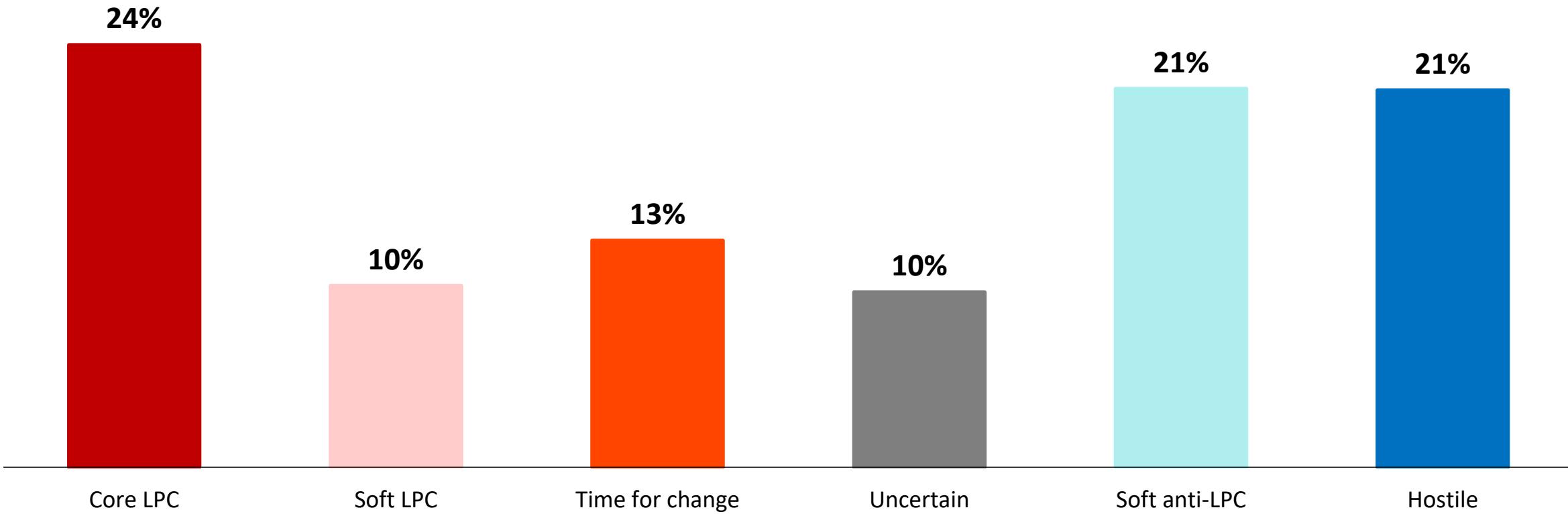


■ Strongly agree ■ Somewhat agree ■ Neither agree nor disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

Time for Change Segmentation: Canadians are most likely to fall into Core left (24%), followed by Soft anti-LPC (21%) and Hostile (21%)



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=1,500]



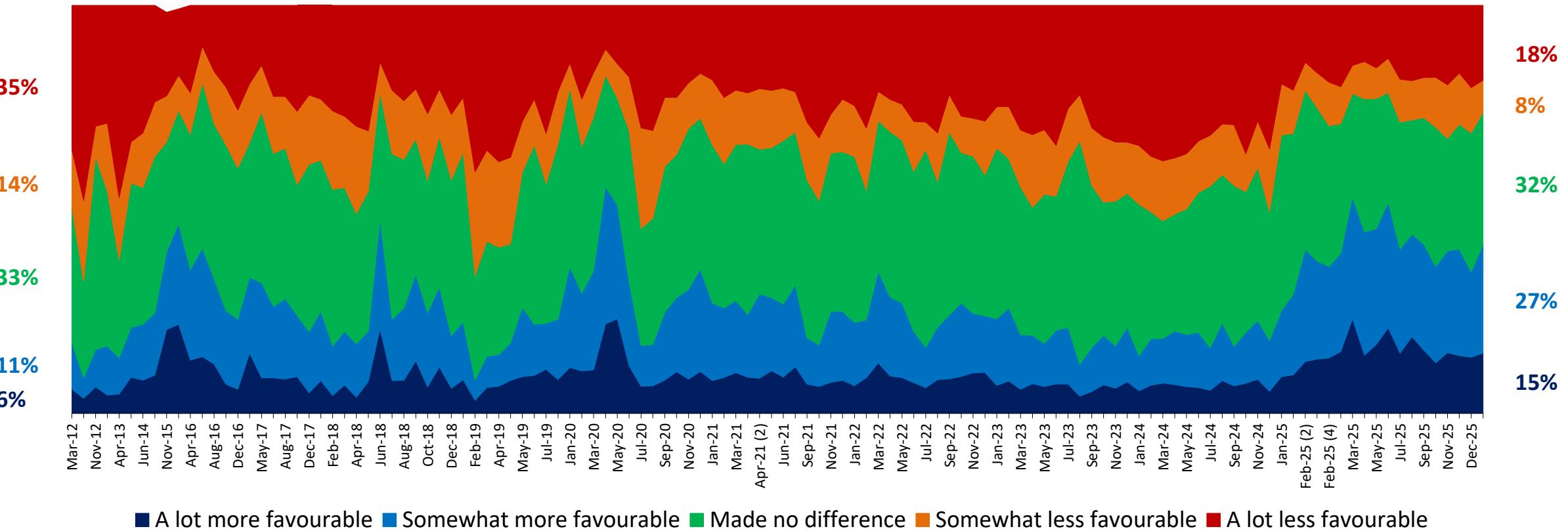
RSH and Federal Satisfaction

Federal Read, Seen, Heard, Impact Tracking: Over 2-in-5 Canadians felt more favourable towards government after what they RSH

60

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=566]

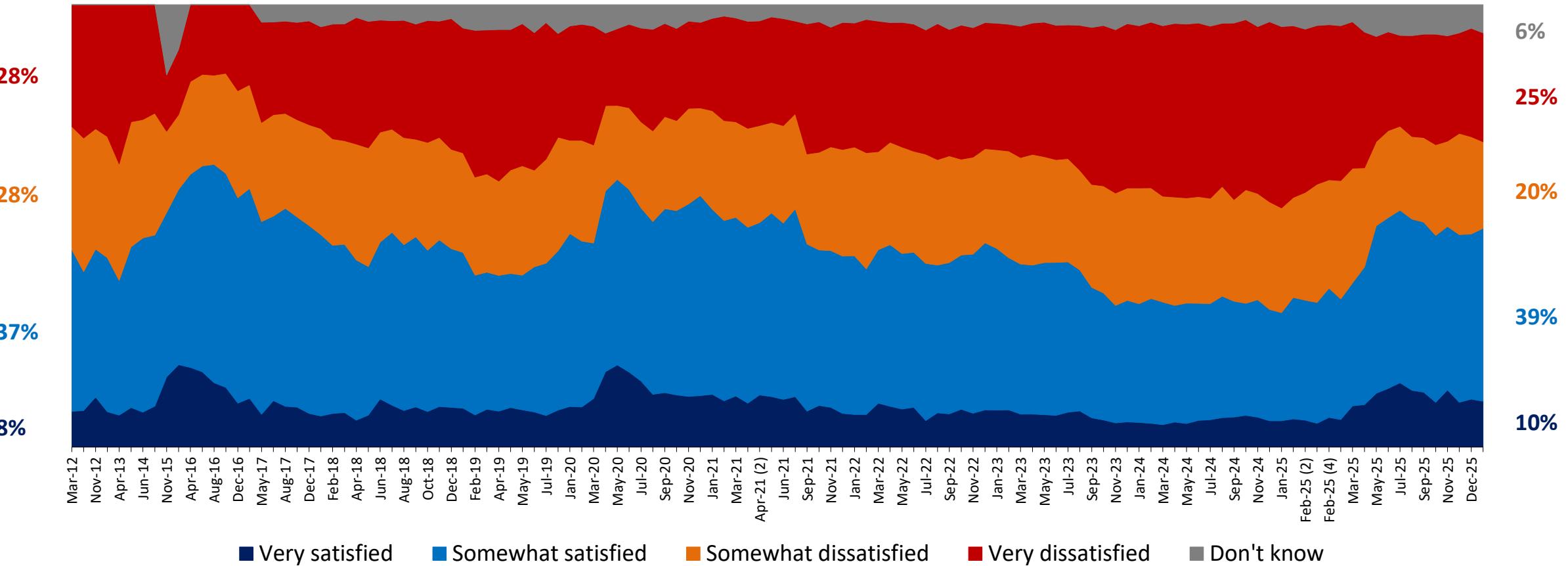


■ A lot more favourable ■ Somewhat more favourable ■ Made no difference ■ Somewhat less favourable ■ A lot less favourable

Federal Satisfaction Tracking: Satisfaction with the performance of the ⁶¹ federal government (49%) remains steady

Q

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=1,500]





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Building Understanding.

