



The Canadian Political Landscape

November 2024

Don Guy

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strategic insights

Setting the table

- The next few years are likely to see significant political change for Canada, including:
 - A potential new federal government
 - An aggressive nationalist government in Quebec
 - The return of the Trump presidency poses significant threats to Canada in the form of tariffs, NAFTA renegotiations, and the potential collapse of multilateral organizations
 - International conflicts roiling over into domestic politics



In the future, should governments be listening to scientific experts to a greater or lesser extent in policy-making?

- **Greater**
- **Lesser**
- **Don't know**





Canadian pundits suggested the pandemic would lead to increased social and government trust

Instead, like much of the western world, the opposite has happened, leaving Canada more than divided than ever in many respects, including how best to manage the economic recovery.

Some 58% of Canadians say that you can't be too careful around other people, compared to 34% who say that you can trust most people.

Only 46% say in the future we should be listening to scientific experts to a greater extent in policy making.

Only 42% say in the future we should have government intervention in the economy to a much greater extent.

Electoral Outcomes

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During Covid

Four provincial elections and one federal election returned five incumbent governments, with three minorities being elevated to majority in BC, New Brunswick and Newfoundland & Labrador, and the Ontario PCs and federal Liberals increasing seats.

Since Covid

Change in Nova Scotia, New Brunswick, Manitoba

Severely reduced majorities of popular governments in BC and Saskatchewan





Economic Outlook

Top Concerns: Health care and cost of housing are top concerns

September 2024 graphed



| | | | | | VERY CONCERNED | | |
|--|----|-----|-----|-----|----------------|----------|-----------|
| | | | | | Mar 2024 | Dec 2023 | Sept 2023 |
| Health care | 7% | | 31% | 61% | 61% | 61% | 60% |
| Cost of housing | 3% | 10% | 28% | 60% | 65% | 60% | 59% |
| Inflation | 9% | | 34% | 56% | 62% | 61% | 64% |
| Level of taxation | 3% | 12% | 32% | 52% | 53% | 49% | 45% |
| Economy | | 11% | 42% | 46% | 53% | 52% | 51% |
| Gap between the rich and everyone else | 3% | 13% | 37% | 46% | 48% | 48% | 46% |
| Gun violence | 8% | 16% | 32% | 45% | 47% | 46% | 43% |
| Interest rates | 3% | 14% | 39% | 43% | 50% | 49% | 50% |
| Poverty and homelessness | | 10% | 45% | 43% | 50% | 45% | 42% |
| Shrinking middle class | 4% | 16% | 39% | 42% | 39% | 36% | 39% |
| Long-term care | 3% | 14% | 41% | 41% | 42% | 41% | 37% |
| Government debt | 4% | 21% | 36% | 40% | 36% | 35% | 31% |

Data <2% not labeled



How concerned are you about the following issues? (September 2024, n=1500)

Lower Concerns: Increasing attention towards opioid crisis

8

September 2024 graphed



NOT CONCERNED AT ALL NOT VERY CONCERNED SOMEWHAT CONCERNED VERY CONCERNED

VERY CONCERNED

Mar 2024 Dec 2023 Sept 2023

| | | | | | | | |
|-------------------------------------|-----|-----|-----|-----|-----|-----|-----|
| Environment | 3% | 17% | 44% | 35% | 37% | 47% | 44% |
| Climate change | 13% | 18% | 34% | 35% | 39% | 43% | 40% |
| Natural disasters by climate change | 11% | 16% | 40% | 33% | 38% | 40% | 43% |
| Opioid crisis | 5% | 25% | 38% | 32% | 29% | 26% | 28% |
| Level of crime in my community | 5% | 27% | 36% | 32% | 34% | 34% | 32% |
| Political situation in the US | 8% | 25% | 38% | 29% | 29% | 23% | 22% |
| Racism in society | 8% | 23% | 40% | 28% | 32% | 34% | 32% |
| Primary and secondary education | 6% | 21% | 46% | 28% | - | - | - |
| Canada's national security | 4% | 25% | 42% | 28% | 29% | 31% | 30% |
| Unemployment | 5% | 24% | 44% | 27% | 29% | 30% | 24% |
| Labour shortages | 6% | 24% | 45% | 26% | 27% | 28% | 26% |
| National unity | 9% | 30% | 38% | 24% | 23% | 20% | 18% |
| Gender equality | 22% | 29% | 30% | 19% | 21% | 21% | 21% |
| University education | 16% | 37% | 31% | 17% | - | - | - |
| Indigenous reconciliation | 19% | 34% | 32% | 15% | 19% | 16% | 15% |



How concerned are you about the following issues? (Base: All respondents with some split sampling N=488-1500)

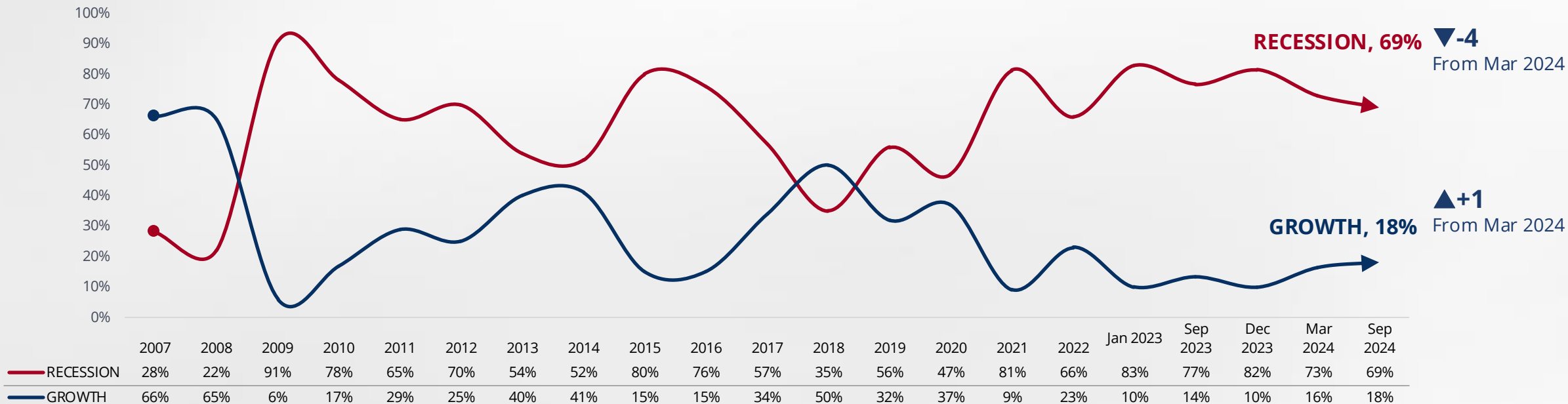
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Which of the following best describes how you feel about Canada's economy. Is the economy in a recession or a period of growth?

- **Recession**
- **Period of Growth**
- **Don't know**



Perceptions of Canada's Economy: 69% believe Canada is in recession, down 4 pts from March





69%

Believe Canada is in a recession

Expect the current recession to last for:

| | |
|--------------------|-----|
| 6 Mths or less | 4% |
| 7 Mths to a year | 16% |
| 13 Mths to 18 Mths | 24% |
| 19 Moths to 2 yrs | 16% |
| Over 2 years | 21% |
| Don't Know | 19% |

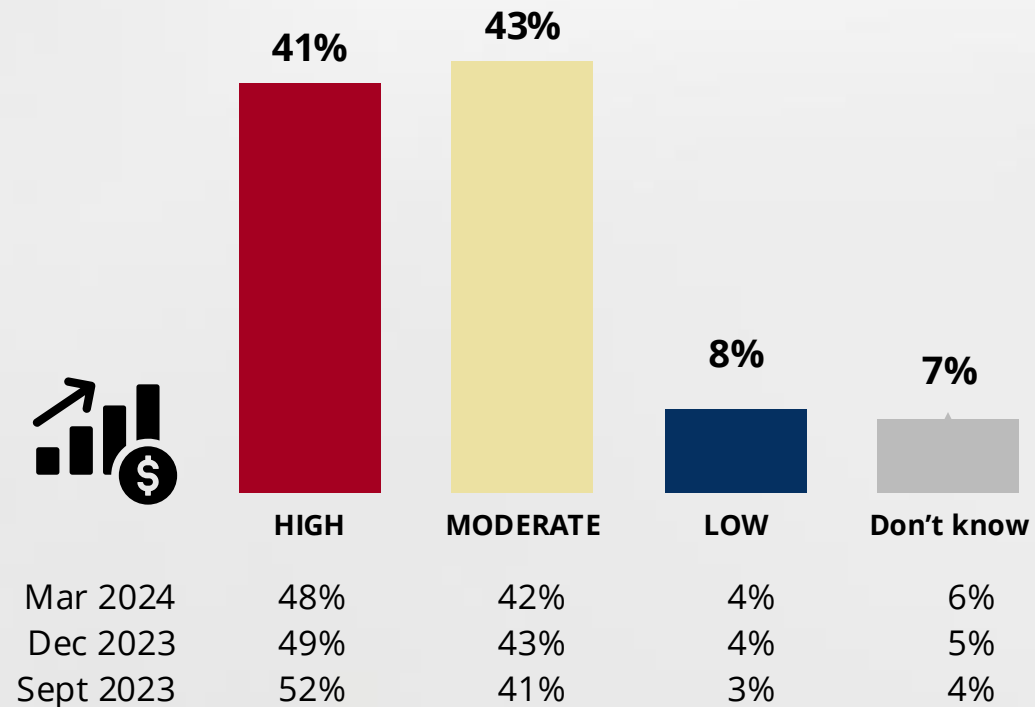
18%

Believe Canada is in a period of growth

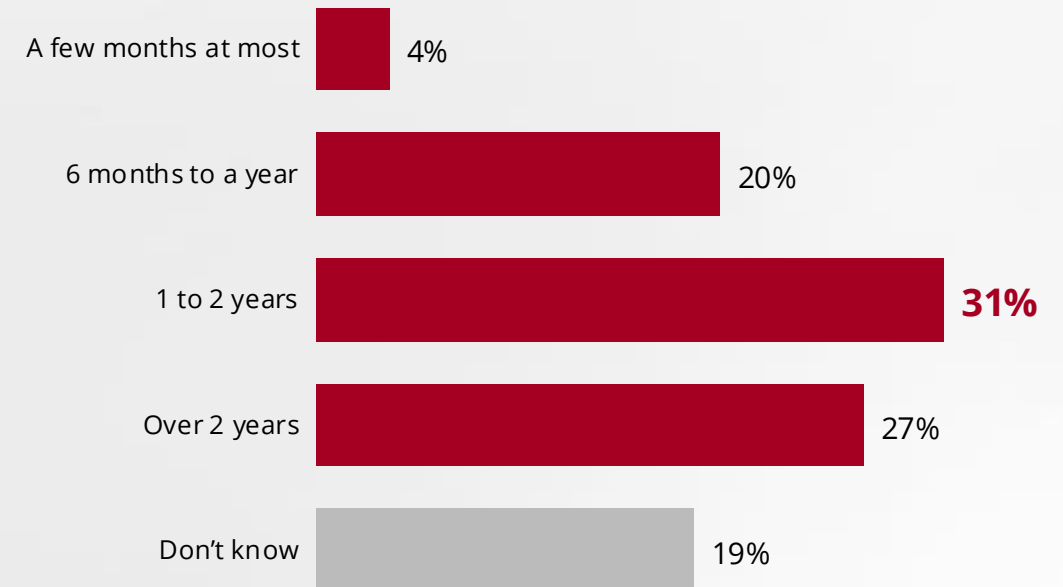
Inflation Perceptions: 41% believe Canada is in a period of high inflation, down significantly from March

- Among those that believe Canada is in a high period of inflation, one third (31%) believe it will last 1-2 years and 27% feel it will last over 2 years.

Perception of current level of inflation in Canada



Expect the current period of high inflation to last for...



Do you believe Canada is currently in a period of high inflation, moderate inflation, or low inflation?
(September 2024, n=1500)

How long do you expect the current period of high inflation to last for? (Base: [Responded HIGH INFLATION])

Governments are wearing blame for inflation – but so is big business

% who feel each of these groups deserves “most of the blame” for high inflation in Canada over the past few years



53%

Blame price gouging
by companies for high
inflation



How much blame do each of the following hold for the current high level of inflation in Canada? (September 2024, n=1500)

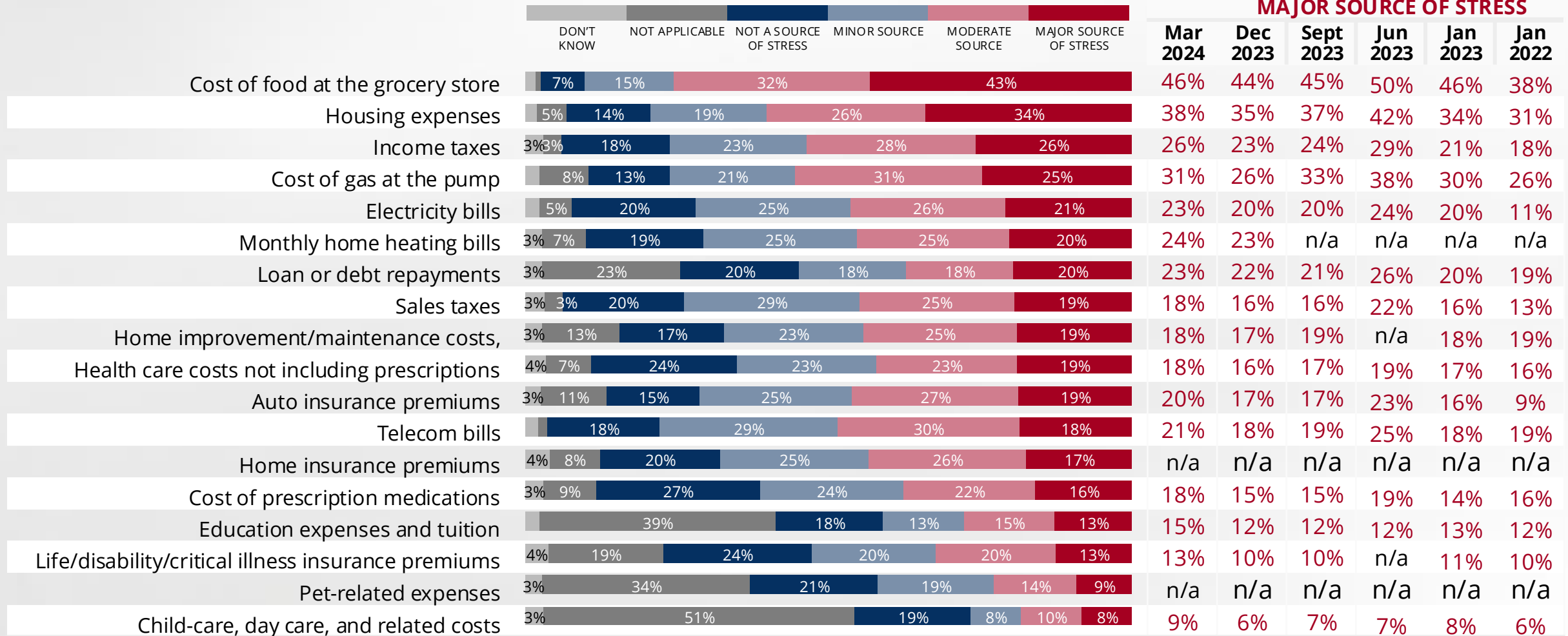
Pressure Points: Some decline in levels of stress felt by groceries, housing, and gas

1

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September 2024 graphed

MAJOR SOURCE OF STRESS



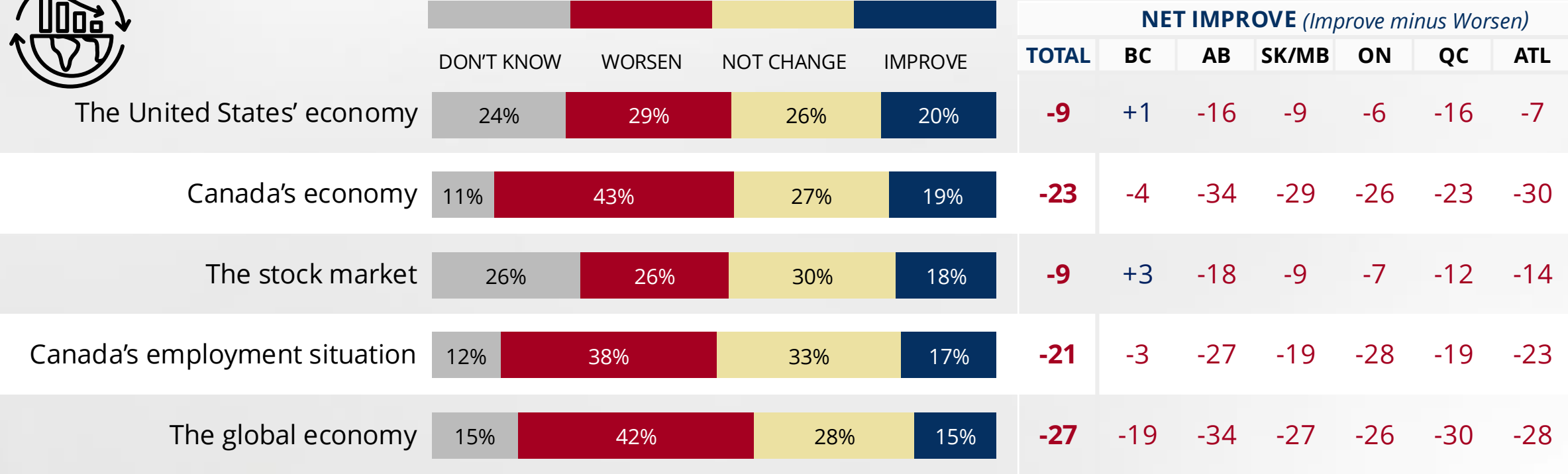
Data <2% not labeled



For each of the following items related to the cost of living, please indicate if it is a major source of stress, a moderate source of stress, a minor source of stress, or not a source of stress at all for you and your household. (September 2024, n=1500)

Expectations: Over twice as many expect Canada's economy to worsen than improve

- Expectations are similar to March.
- British Columbians are more optimistic in their outlook.



Thinking about the cost of living and your personal financial situation, are you...

- **Falling behind**
- **Just getting by**
- **Getting ahead**
- **Financially secure**
 - **Don't know**

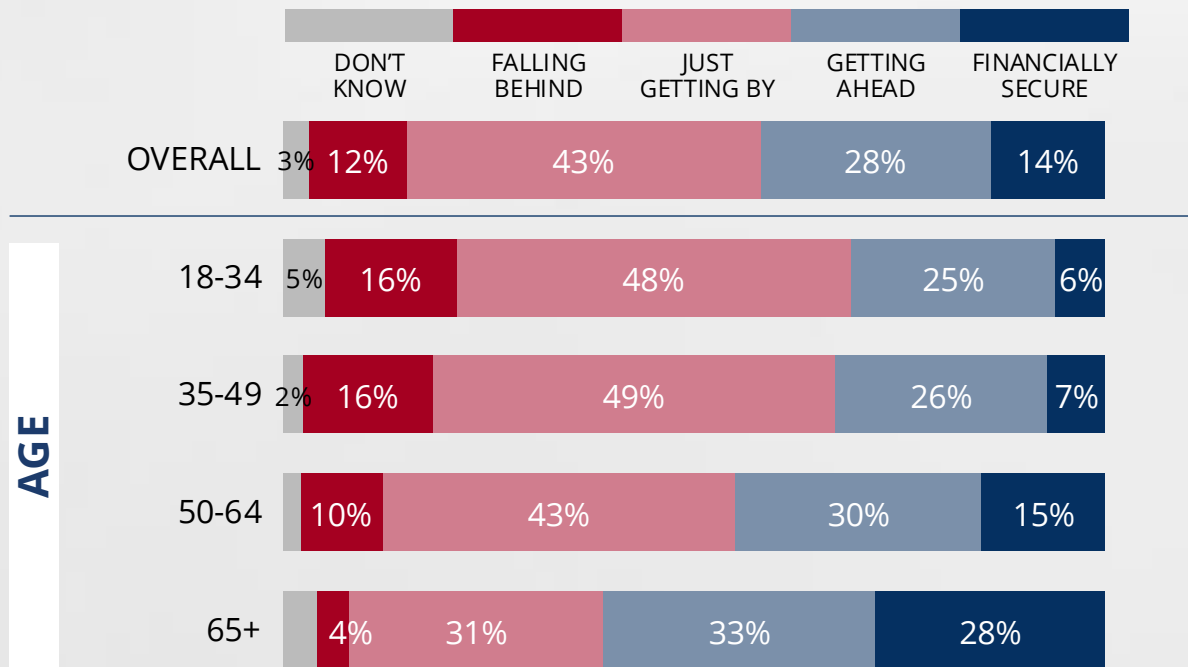


Personal Finances: Majority of Canadians still feel they are either barely managing or falling behind financially, rising by 3 pts

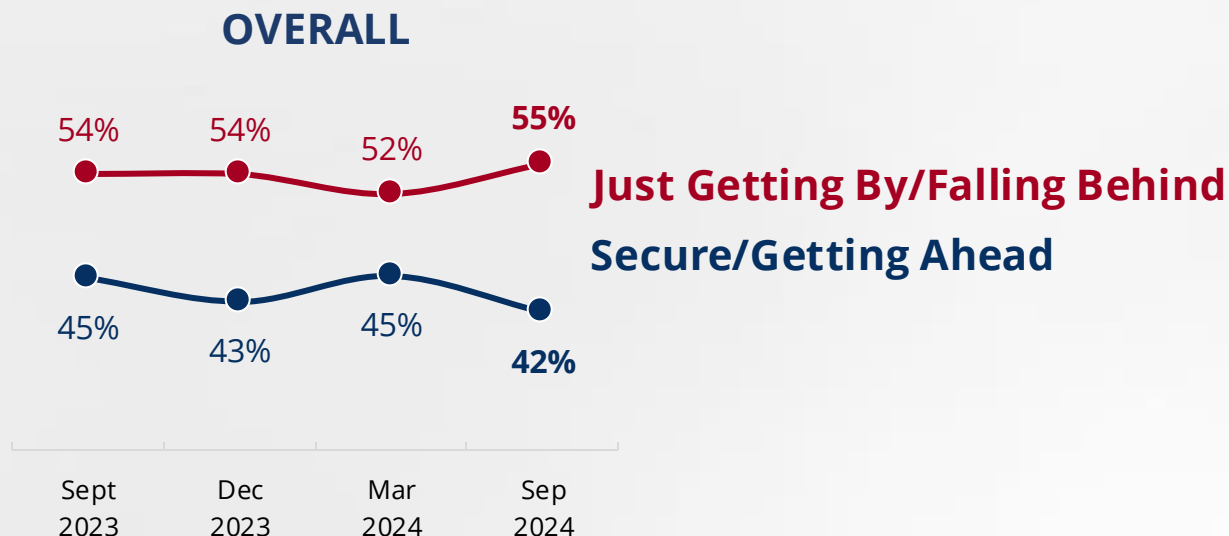
16
6

- Quebec remains the only province where a majority feel they are financially secure or getting ahead (52%).
- Seniors and those making more than 100k dollars tend to feel more confident about their financial security.

Cost of Living and Personal Financial Situation, Currently



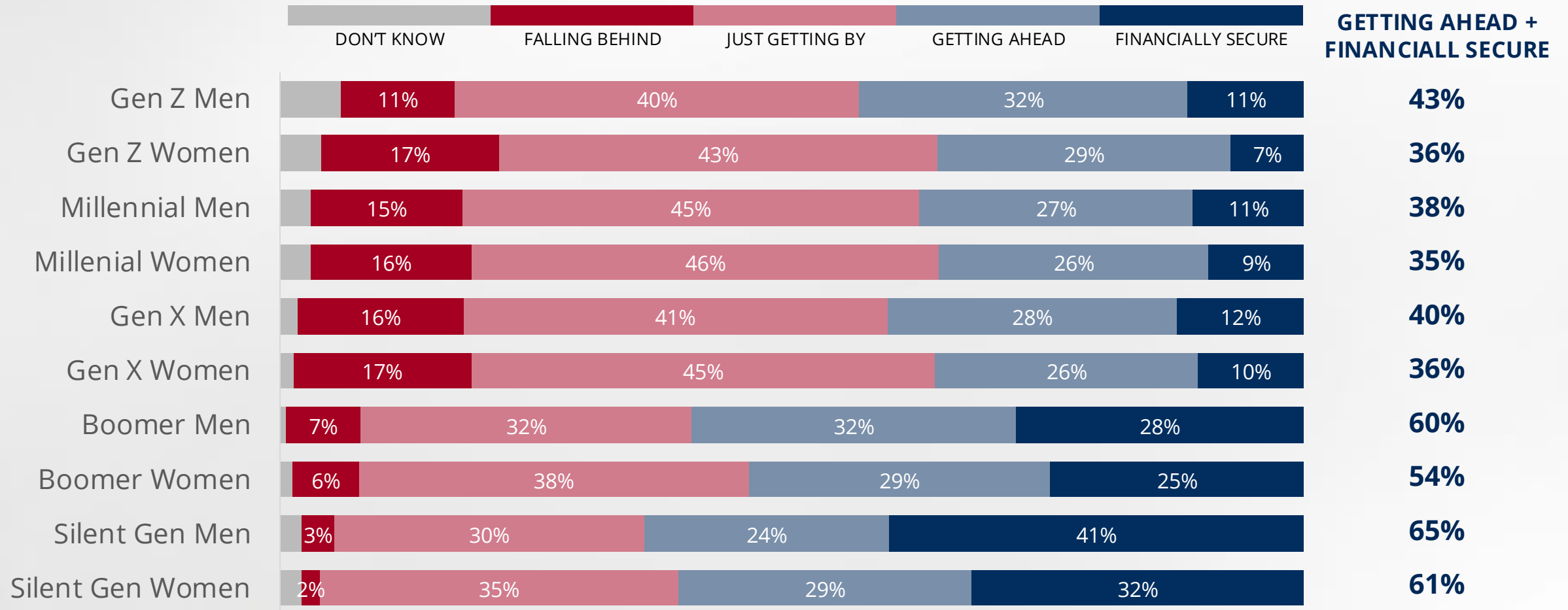
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Thinking about the cost of living and your personal financial situation, are you currently...
(September 2024, n=1500)

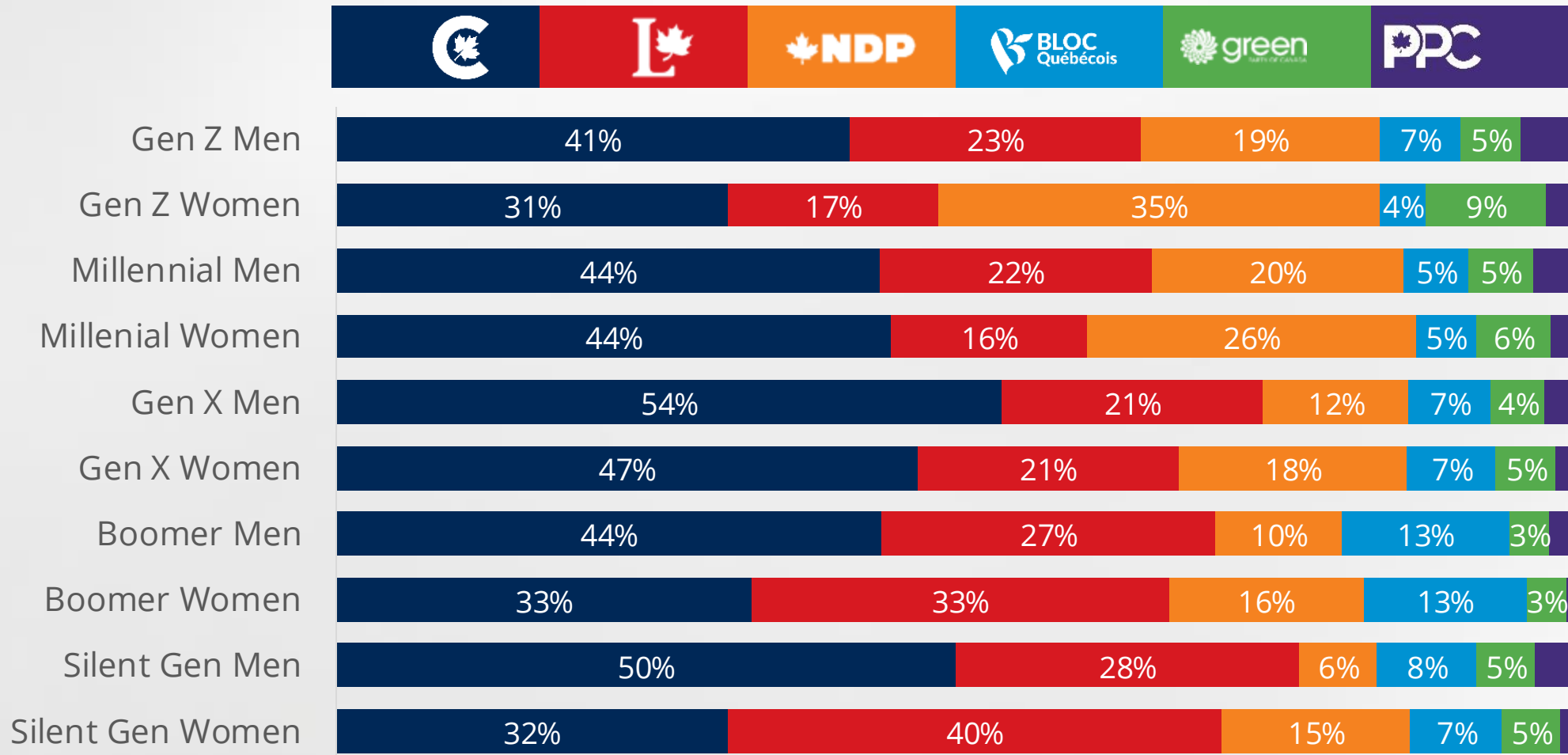
Stark contrast between self-assessed financial situation between older and younger Canadians.

17

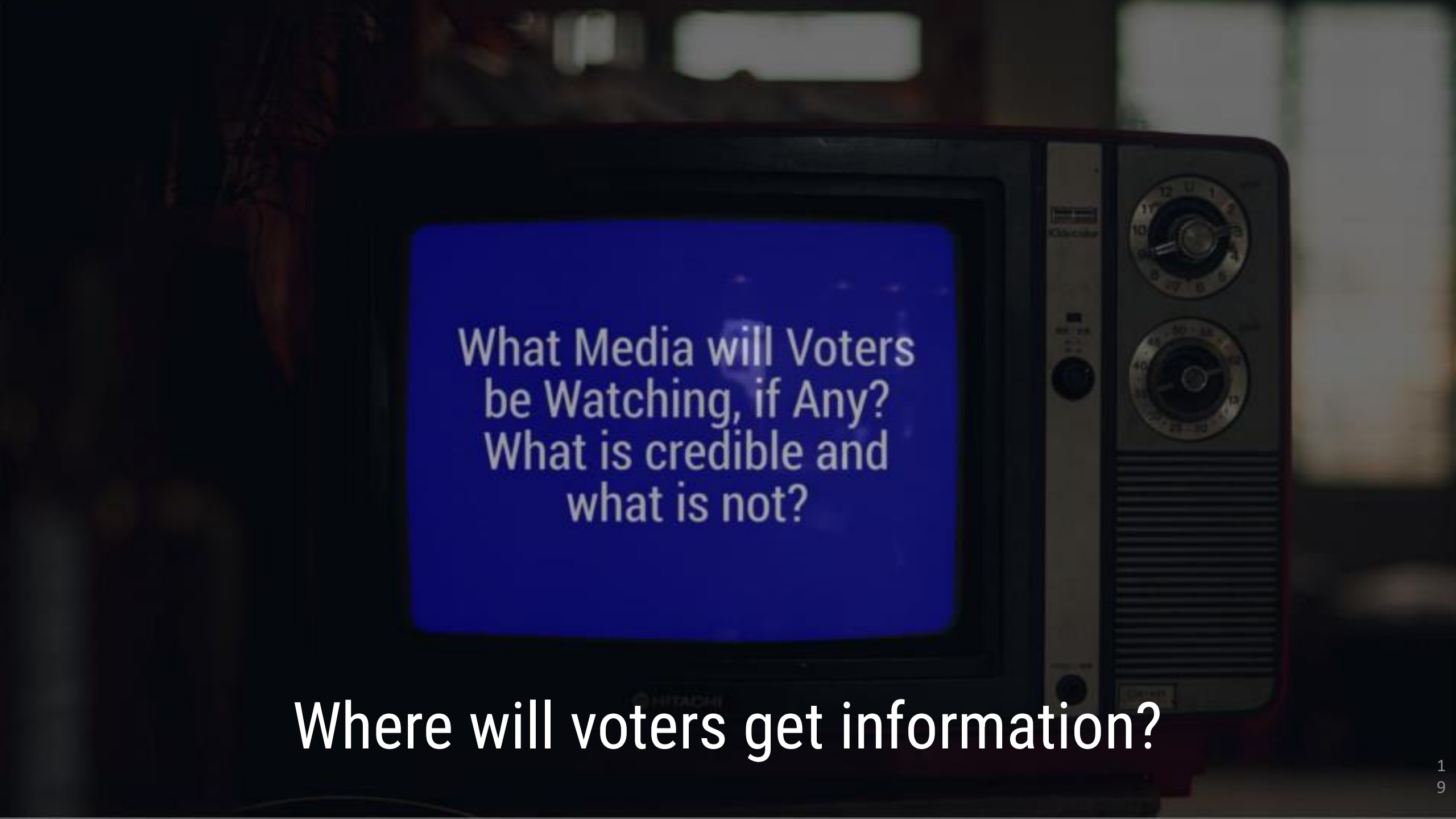


Thinking about the cost of living and your personal financial situation, are you currently... (January-June 2024, n=9524)

This has inverted historical voter patterns – young voters look right, older voters look left right now



Who would you be most likely to vote for if a federal election were held today? (Decided Vote) (January-June 2024, n=7064)

A vintage Hitachi television set is shown in a dark, dimly lit room. The screen is a solid blue color and displays white text. The television has a silver faceplate on the right side with two large circular dials and a speaker grille. The Hitachi logo is visible at the bottom center of the frame.

What Media will Voters
be Watching, if Any?
What is credible and
what is not?

Where will voters get information?

Politicians can no longer rely on traditional media to reach these younger voters

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Sources of News – Among Men

| Gen Z | | Millennial | | Gen X | | Boomer | | Silent Gen | |
|---------------------|-----|---------------------|-----|---------------------|-----|---------------------|-----|---------------------|-----|
| Social media | 52% | Social Media | 41% | TV | 49% | TV | 68% | TV | 78% |
| Online news sites | 27% | Newspapers (online) | 27% | Radio | 38% | Newspapers (online) | 36% | Newspapers (online) | 42% |
| TV | 24% | Websites | 26% | Websites | 35% | Radio | 35% | Radio | 36% |
| Mobile news apps | 24% | Mobile news apps | 24% | Newspapers (online) | 31% | Websites | 32% | Websites | 33% |
| Newspapers (online) | 20% | Radio | 23% | Social media | 28% | Social media | 21% | Email newsletters | 12% |

Sources of News – Among Women

| Gen Z | | Millennial | | Gen X | | Boomer | | Silent Gen | |
|---------------------|-----|---------------------|-----|---------------------|-----|---------------------|-----|--------------------|-----|
| Social media | 60% | Social Media | 43% | TV | 46% | TV | 74% | TV | 88% |
| Mobile news apps | 22% | TV | 24% | Social media | 36% | Radio | 35% | Radio | 34% |
| Newspapers (online) | 22% | Newspapers (online) | 23% | Radio | 33% | Newspapers (online) | 28% | Newspapers (print) | 29% |
| TV | 22% | Radio | 23% | Newspapers (online) | 22% | Websites | 25% | Websites | 21% |
| Websites | 17% | Websites | 19% | Websites | 22% | Social media | 18% | Email newsletters | 14% |



Generally speaking, where do you get the majority of your news on a daily basis? (May-June 2024, n=3500)

The disruption of media consumption habits has deeply disrupted the business model of voter engagement



THE MEDIAN (SWING VOTER) HAS NEVER BEEN LESS INFORMED OR ENGAGED, SO NEVER HAS HAD LESS VALUE.



INSTEAD, POLITICAL PARTIES ARE POURING RESOURCES INTO FINDING OUTLIER NON-VOTERS WHO THINK LIKE THEIR VOTERS AND TURNING THEM OUT.



SO POLITICAL PARTIES ARE EMBRACING ELECTION POLICIES AND MESSAGES DESIGNED TO APPEAL TO EXTREMES RATHER THAN COMMON GOOD.



The summer return to normal minority parliament has been a shock to the system

58%

Of Canadians are angry or annoyed towards the federal government, while only 8% feel pleased or happy about them.

- Ottawa feels very unstable.
- The NDP has withdrawn confidence to put distance between themselves and an unpopular Trudeau accord. This will also give them additional leverage on confidence votes.
- The BQ are riding the PQ's coat tails in Quebec.
- The Conservatives are playing effective psychological warfare with the Liberals – raising anxiety at every opportunity.
- Prime Minister Trudeau's personal approval levels and Liberal Party support levels are plumbing new lows for the Liberal Party of Canada in a non-election period.
- The Liberals believe that if they can hang on to the spring underlying fundamentals already improving (inflation, housing, immigration, carbon tax rebates) will give them a shot, as well as new variables – Trump, Quebec separatism, Conservative candidates.

British Columbia

- The BC Conservatives had momentum from December 2023 until the televised Leaders debate.
- At that point, the Conservatives had passed the governing NDP and were on the way to forming a majority government.
- A lacklustre presentation by John Rustad combined with effective war room attacks on Conservative candidate values brought the NDP back from the brink.
- The NDP recognize that they have had a near death experience and will return with a more aggressive agenda on affordability, housing and growth.



51%

Of Conservative voters in BC
say they voted Conservative to
send Trudeau a message

Saskatchewan

- The opposition NDP made significant gains in the year leading up to the election, as “change” sentiment rose due to a teachers strike and a health care system in crisis.
- Like David Eby, Scott Moe spent the leader’s TV debate under attack from NDP Leader Carla Beck, but he sustained the attacks.
- The NDP nearly swept Regina and Saskatoon, but stalled in the smaller cities and ran into a blue rural seat wall.

+9

Saskatchewan voters were more likely to trust the NDP on **health care**

+10

Saskatchewan voters were more likely to trust the Sask Party on **affordability**
(and +21 on **the economy**)



New Brunswick

- 3x more New Brunswickers were negative than positive towards Blaine Higgs. This was largely fuelled by a perception he had the wrong priorities and that his “my way or the highway” leadership style wasn’t working.
- Susan Holt focused on health care, while offering immediate cost of living relief to New Brunswickers. She performed well in the debates.
- The Liberals made massive gains in and around Saint John, and to a less dramatic extent in Fredericton and Moncton.

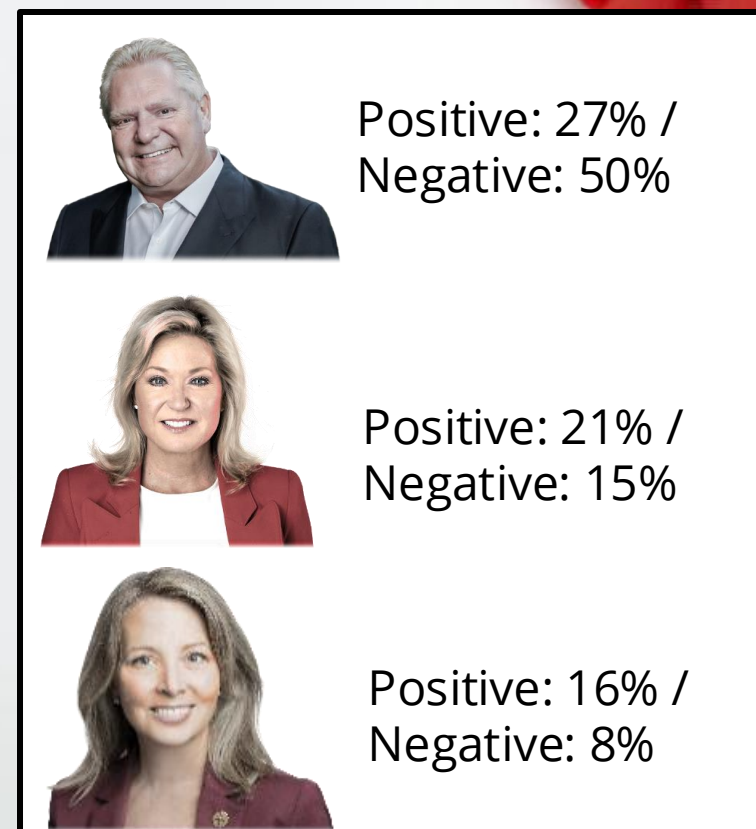
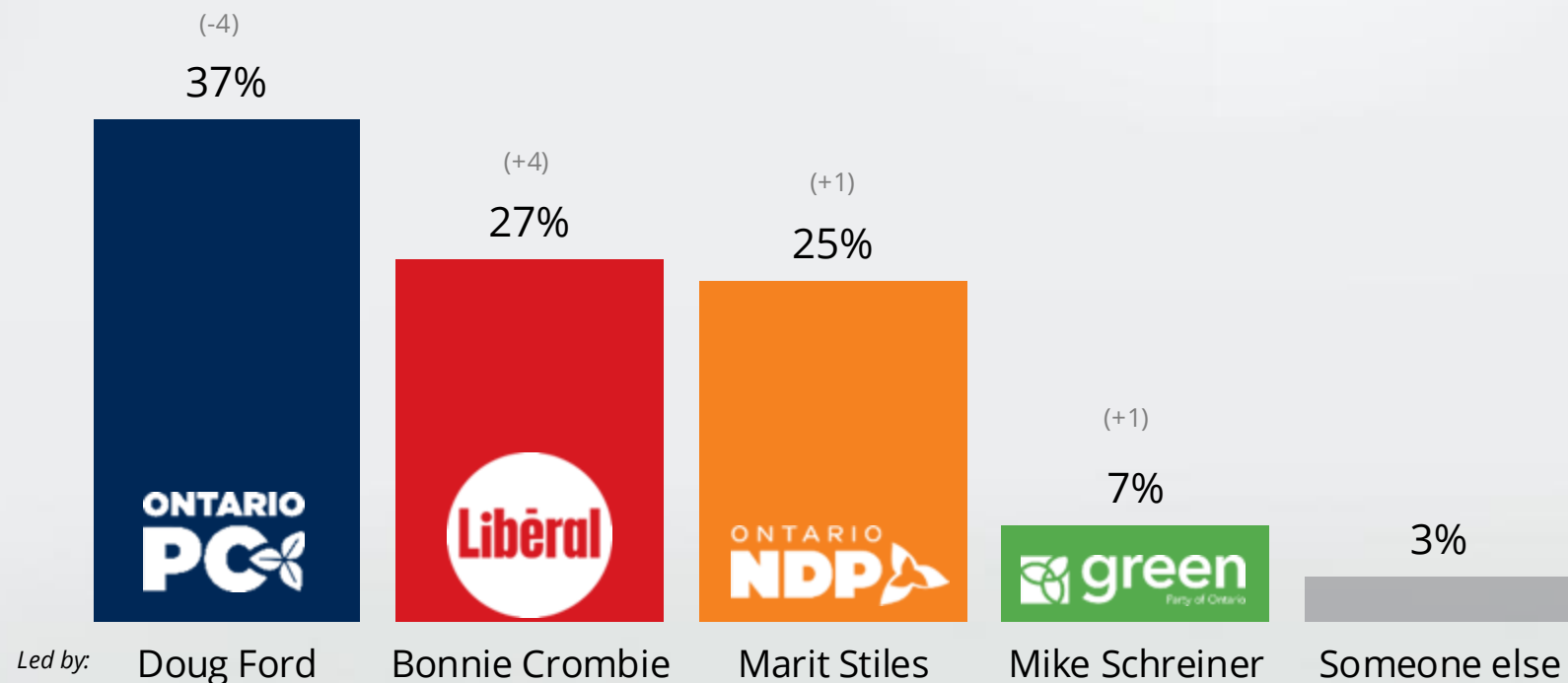
+15

New Brunswick voters were more likely to feel Susan Holt rather than Blaine Higgs “has the right priorities”



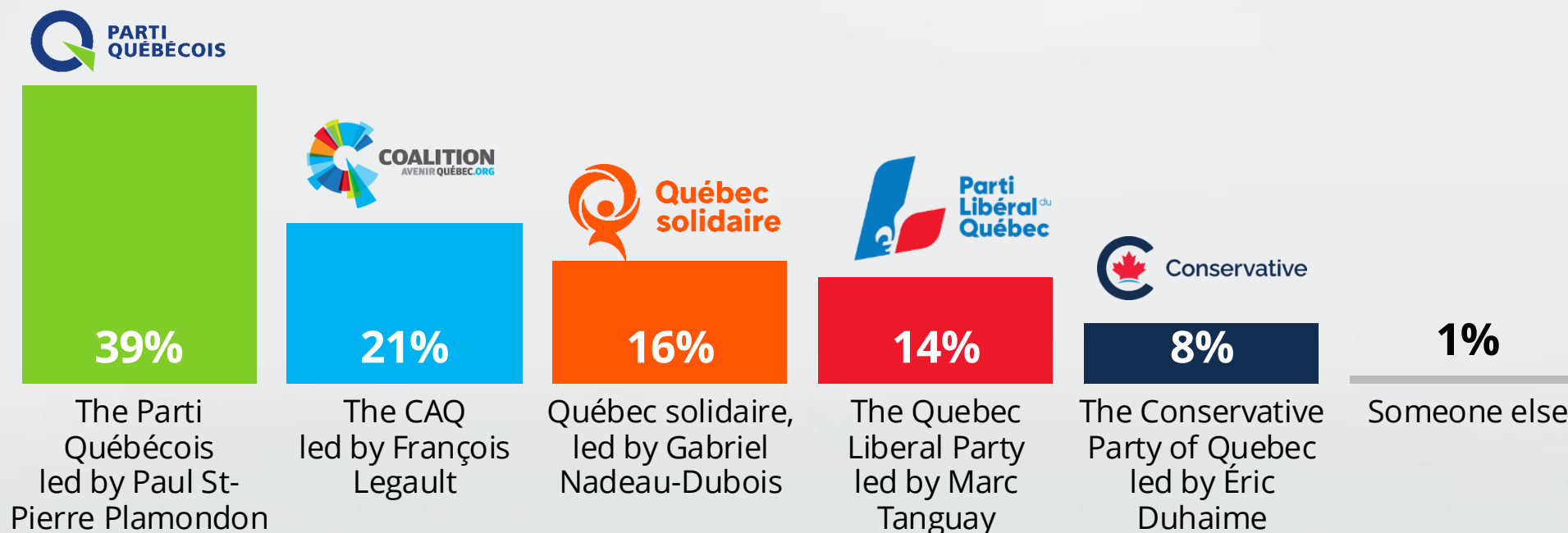
Ontario

- The next scheduled election is June 4th, 2026, but the Ford team has signalled that an early 2025 election is likely.



Quebec

- The next scheduled election is October 5th, 2026.
- Legault has fallen out of favour, and the PQ has led every single poll over the past year.
- The Quebec Liberals have not capitalized on the CAQ's struggles, but Pablo Rodriguez's arrival on the scene could shake up the landscape.

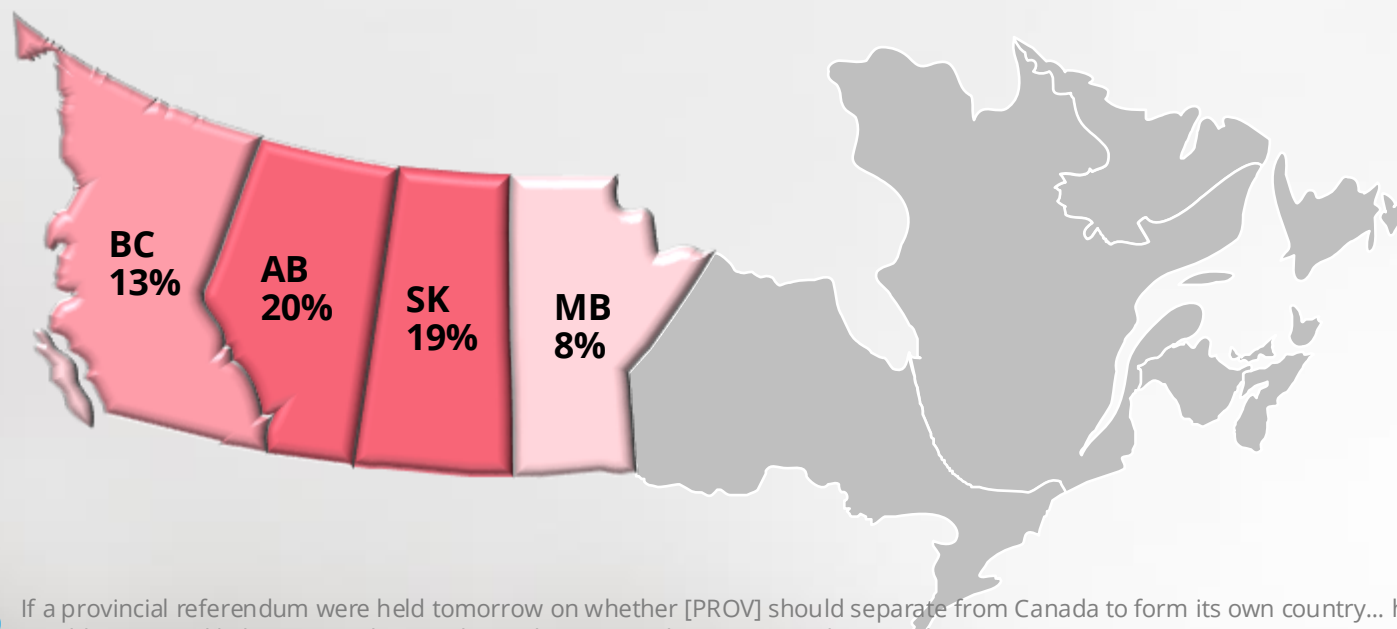


Who would you be most likely to vote for or lean towards if a provincial election were held today in Quebec? (November 2024, n=277)

Energy sector pressures risk fueling Alberta separatist sentiment

- Separatist sentiment in Alberta rises to 31% among those who work in the oil & gas industry.
- 61% of Albertans feel the oil & gas sector is very important to the province's economic future. Threats to the sector from Ottawa risk inflaming feelings of alienation.

[PROV] Should Separate From Canada and Form its Own Country



20%

of Albertans believe the province should separate from Canada and become its own country



If a provincial referendum were held tomorrow on whether [PROV] should separate from Canada to form its own country... how would you most likely vote? Is there a choice that you are leaning towards? (March 2024, n=2001)

Will a Trump Presidency be good or bad for Canada?

- **Good**
- **Bad**
- **Don't know**

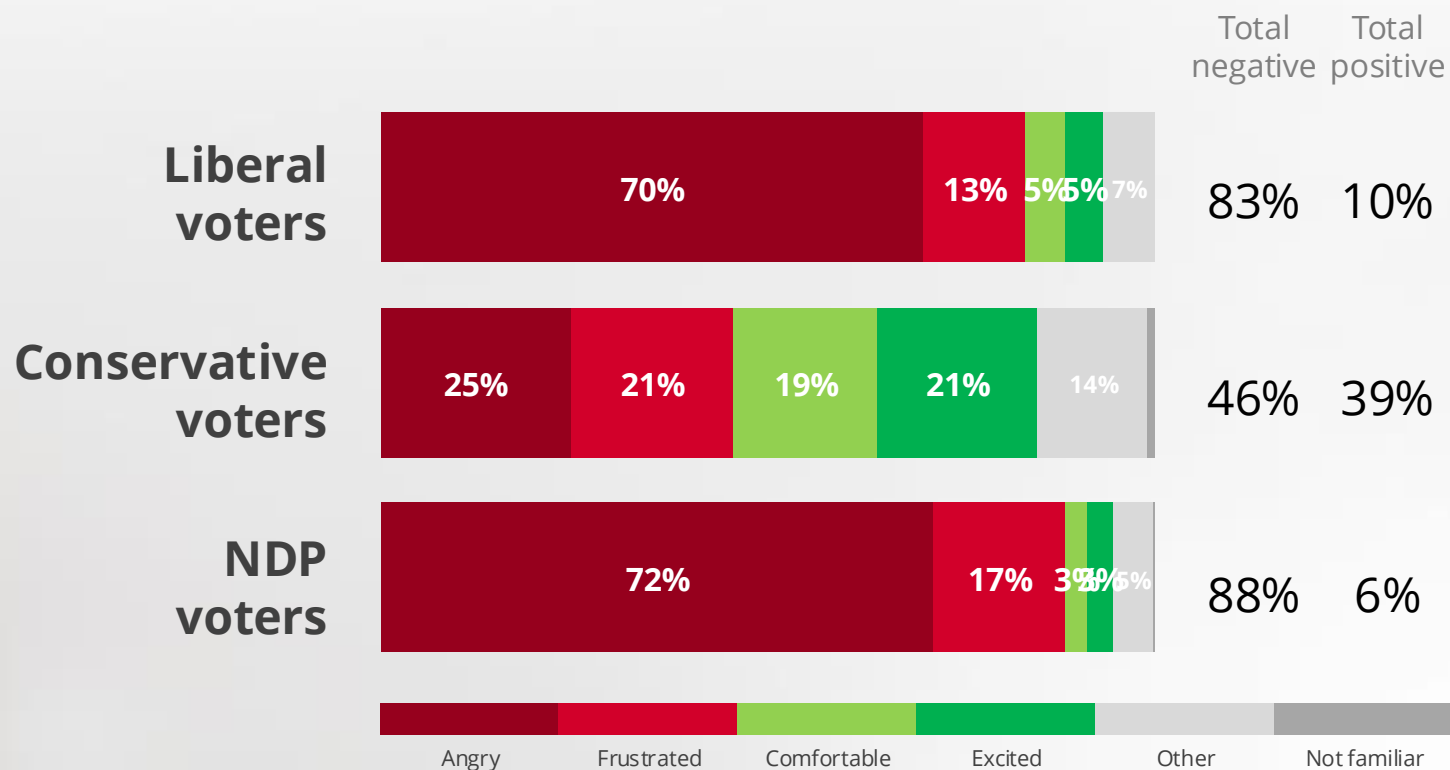


Canadians nervous about the second Trump presidency

- Canadians are largely negative towards Trump, though Conservative voters are split on how they feel.

62%

Of Canadians expect the Trump presidency will be a **bad thing** for Canada, and only 14% think it will be a good thing



How do you feel about the following people? (September 2024, n=1500)



For more information

Don Guy

dguy@pollara.com

647-962-6754

www.pollara.com

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strategic insights