

The Canadian Political Landscape

November 2024

Don Guy

pollara
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

During Covid

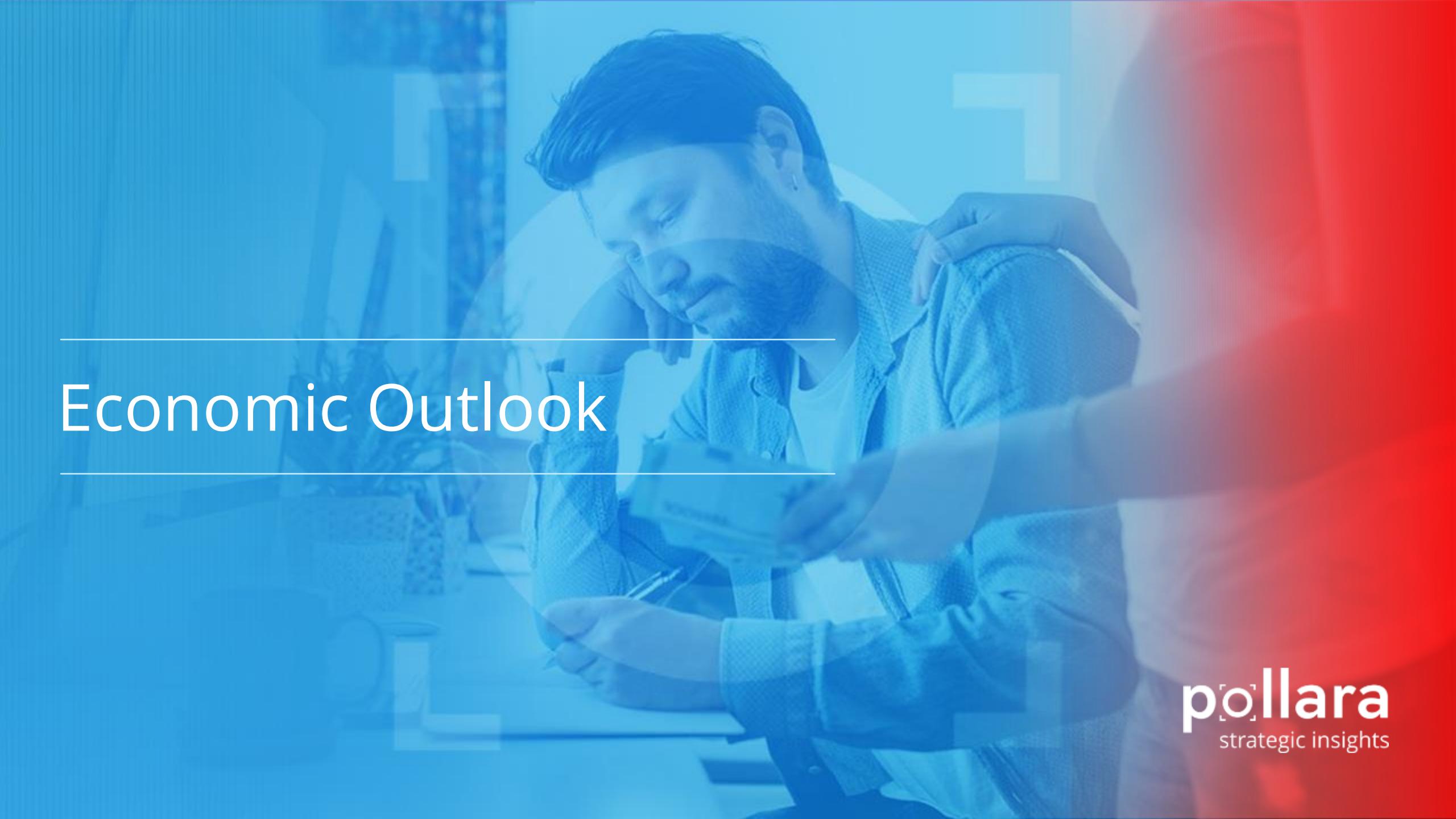
Four provincial elections and one federal election returned five incumbent governments, with three minorities being elevated to majority in BC, New Brunswick and Newfoundland & Labrador, and the Ontario PCs and federal Liberals increasing seats.

Since Covid

Change in Nova Scotia, New Brunswick, Manitoba

Severely reduced majorities of popular governments in BC and Saskatchewan





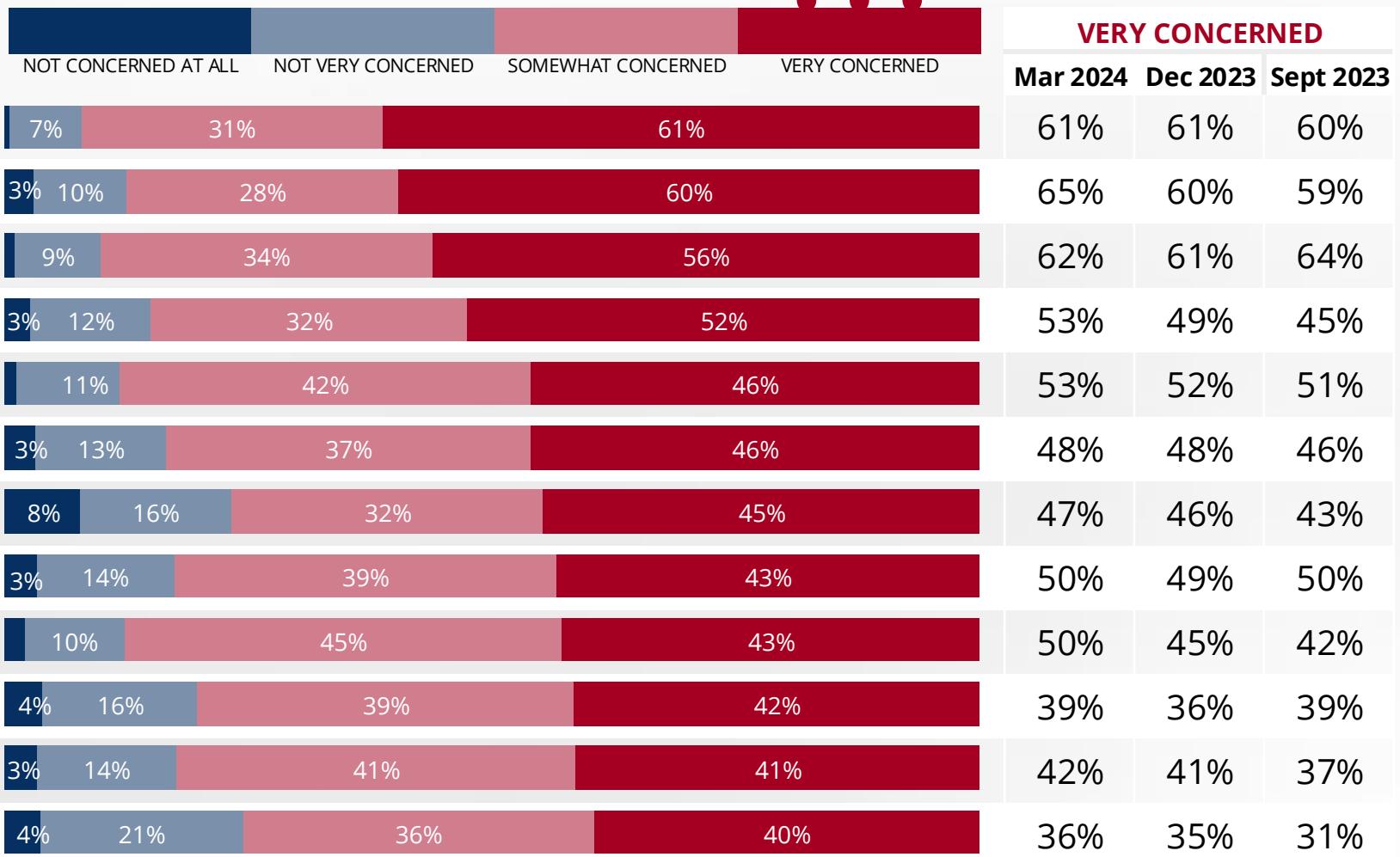
Economic Outlook

pollara
strategic insights

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

7

September 2024 graphed



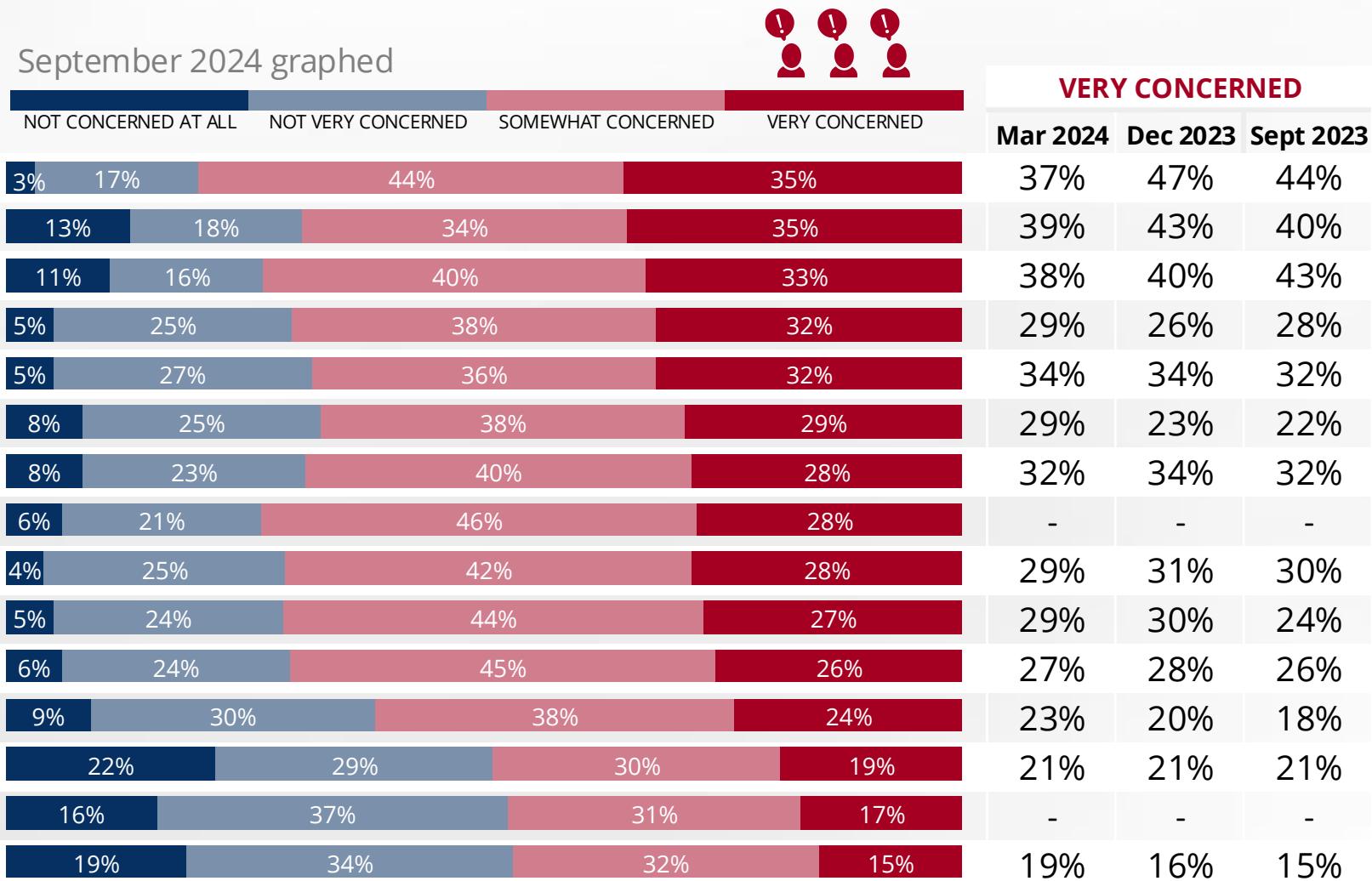
Data <2% not labeled



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

Lower Concerns: Increasing attention towards opioid crisis

8

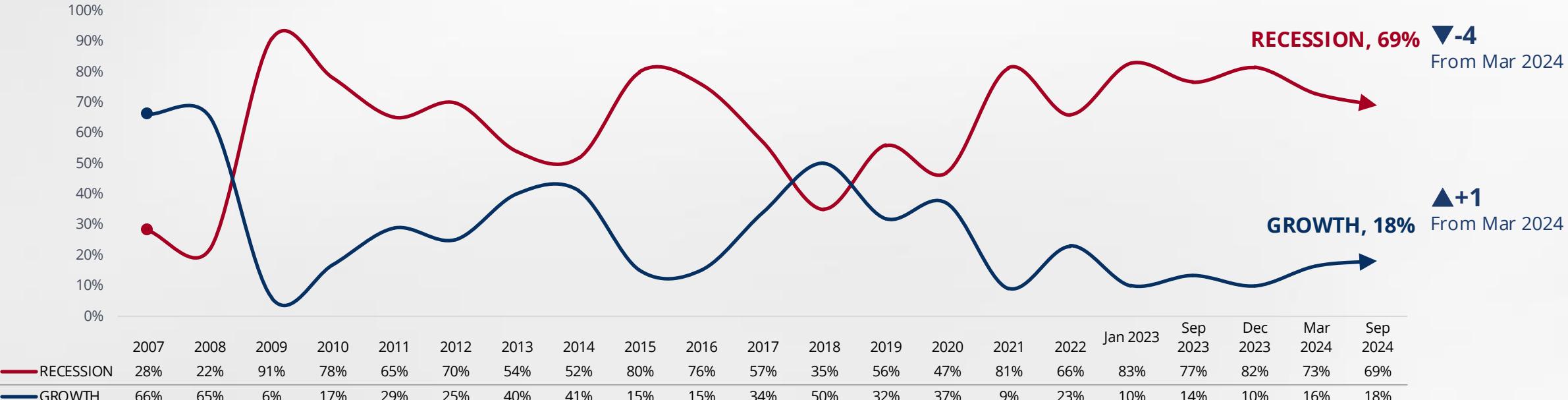


How concerned are you about the following issues? (Base: All respondents with some split sampling N=488-1500)

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**

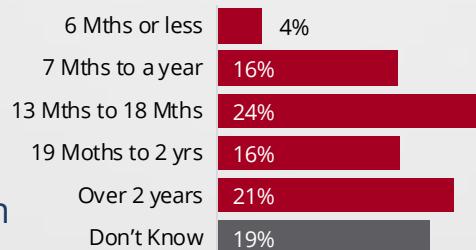
Perceptions of Canada's Economy: 69% believe Canada is in recession, down 4 pts from March



69%

Believe Canada is in a recession

Expect the current recession to last for:



18%

Believe Canada is in a period of growth



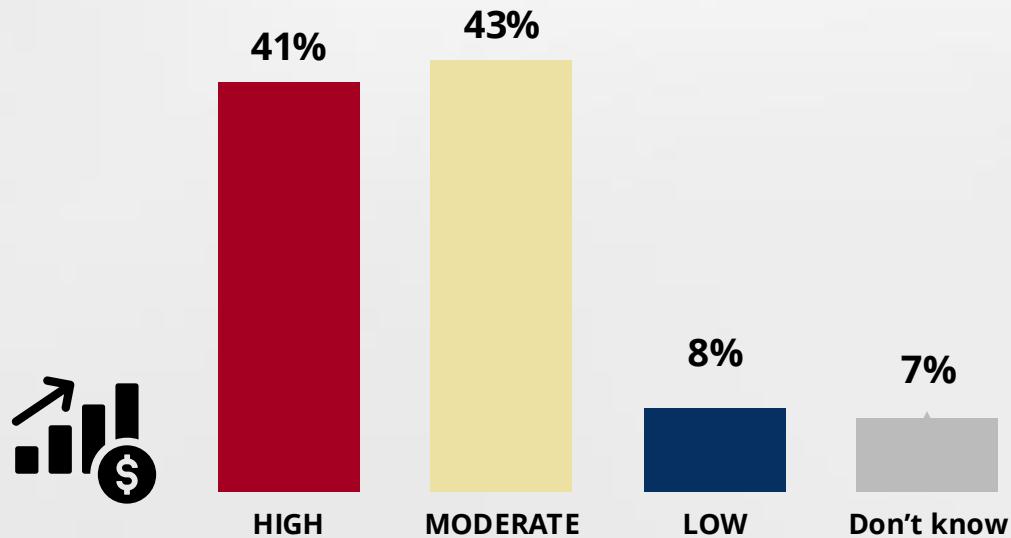
Which of the following best describes how you feel about Canada's economy. Is the economy in a ...
(September 2024, n=1500) Not Shown In Chart: 13% Don't Know
How much longer do you expect the current recession to last for?

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

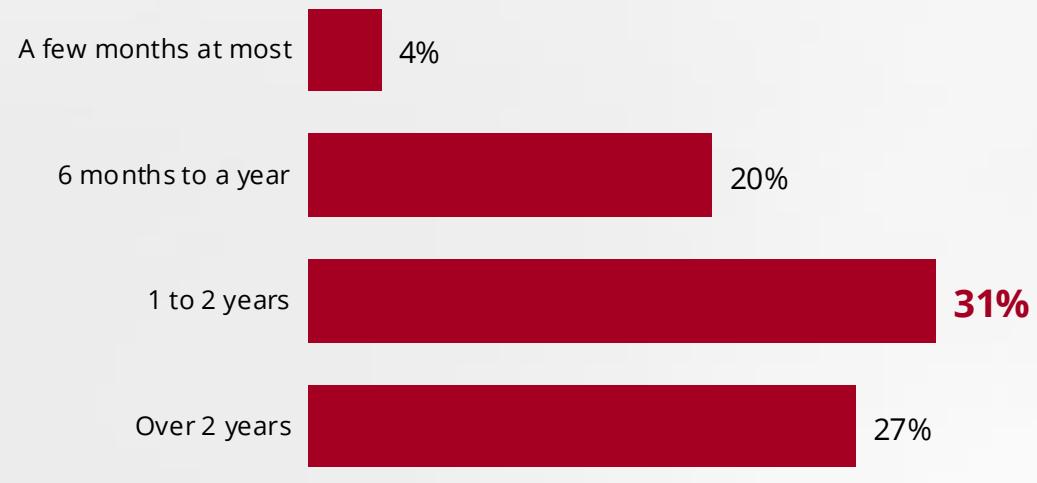
- Among those that believe Canada is in a high period of inflation, one third (31%) believe it will last 1-2 years and 27% feel it will last over 2 years.

11
1

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])



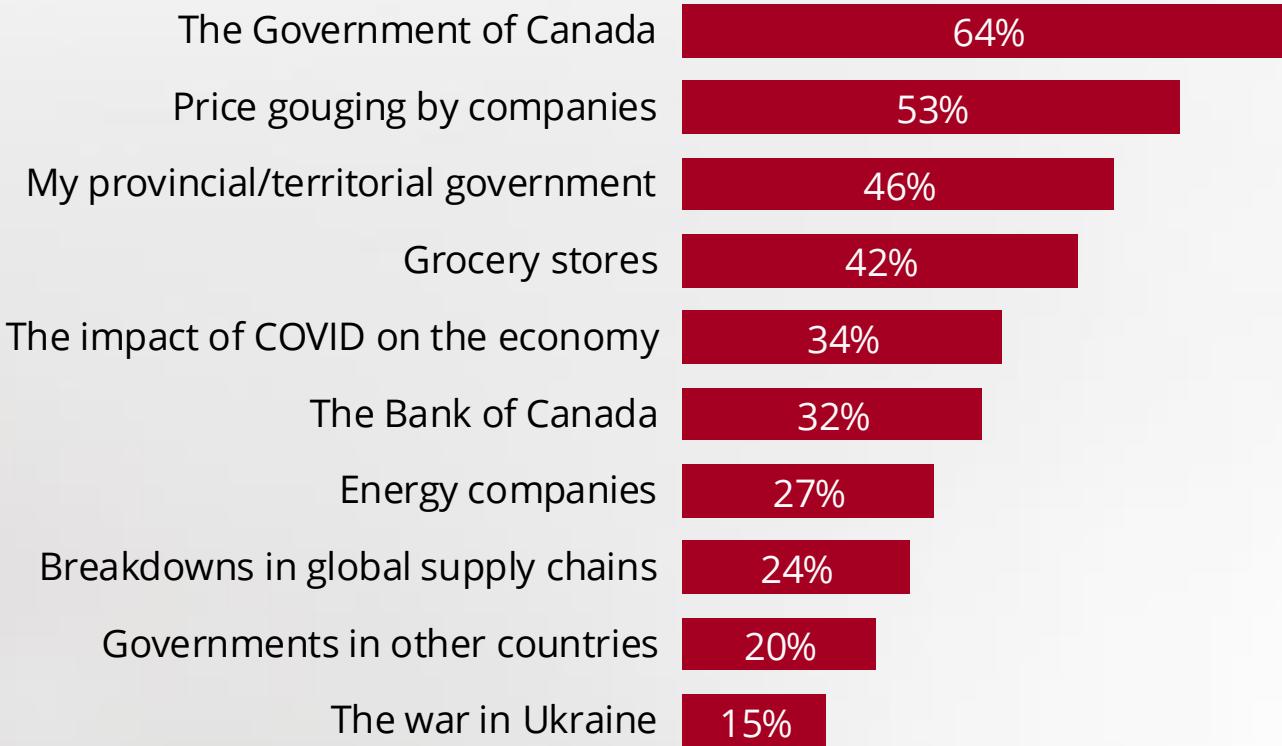
53%

Blame price gouging
by companies for high
inflation

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

12

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



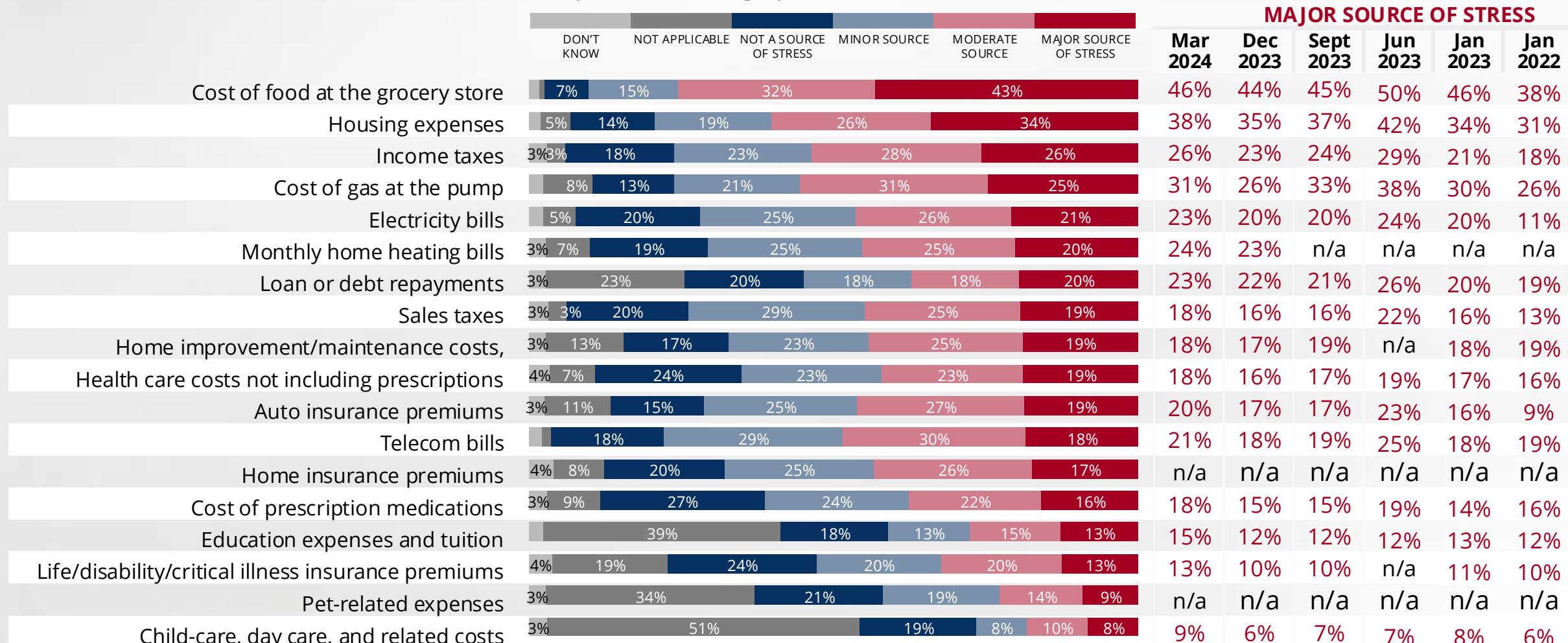
How much blame do each of the following hold for the current high level of inflation in Canada? (September 2024, n=1500)

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

1

3

September 2024 graphed



Data <2% not labeled

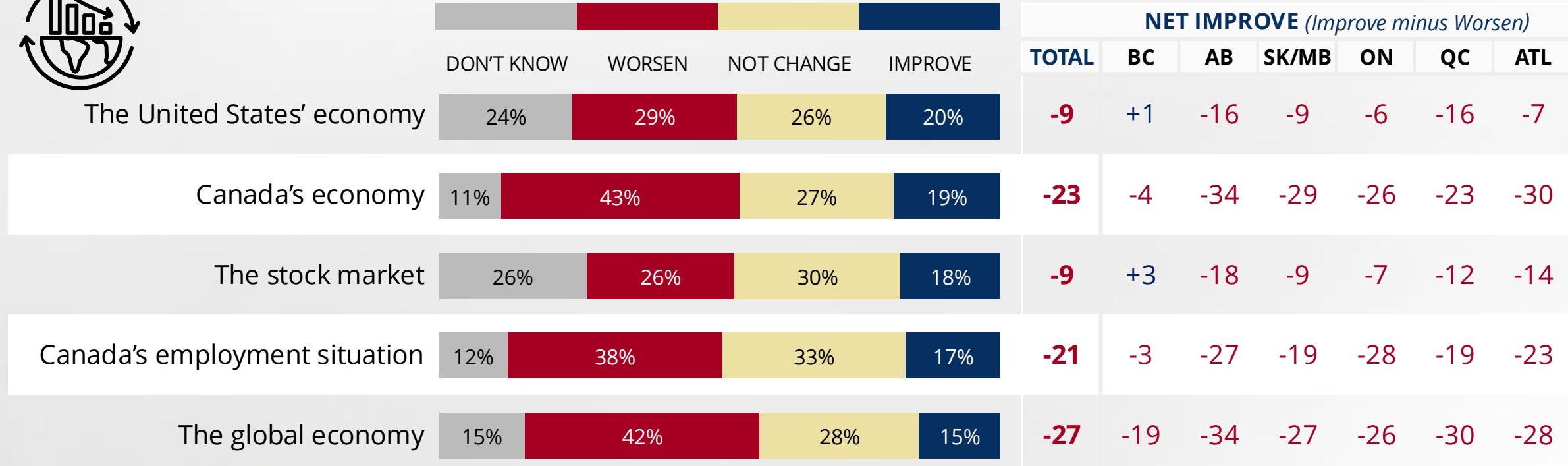


For each of the following items related to the cost of living, please indicate if it is a major source of stress, a moderate source of stress, a minor source of stress, or not a source of stress at all for you and your household. (September 2024, n=1500)

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

14
1
4

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



Over the next twelve months, do you expect each of the following to improve, worsen, or not change?
(September 2024, n=1500)

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**

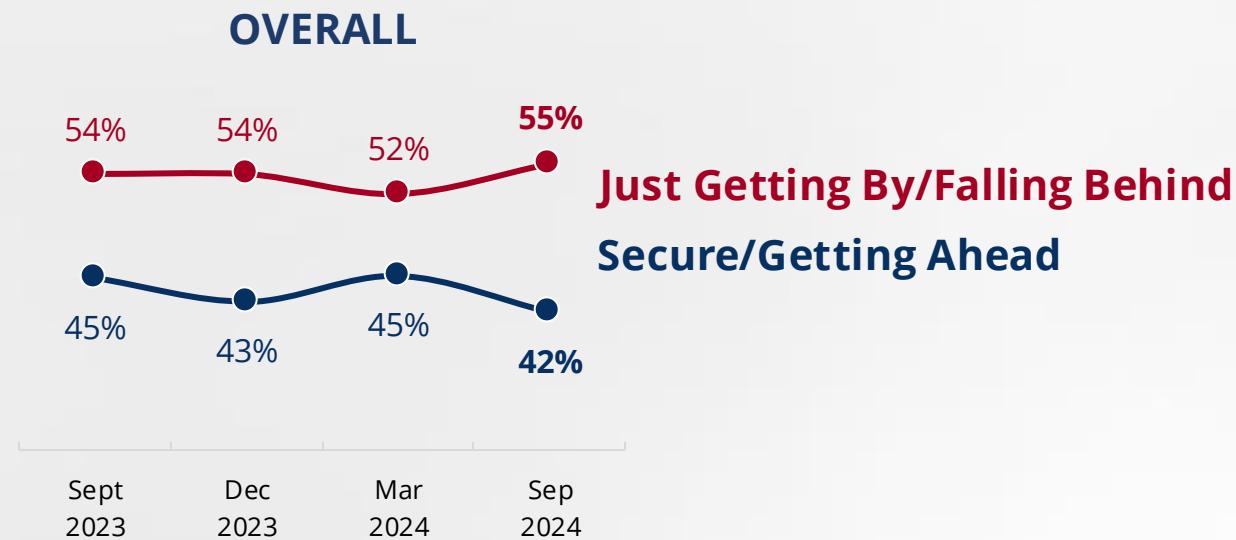
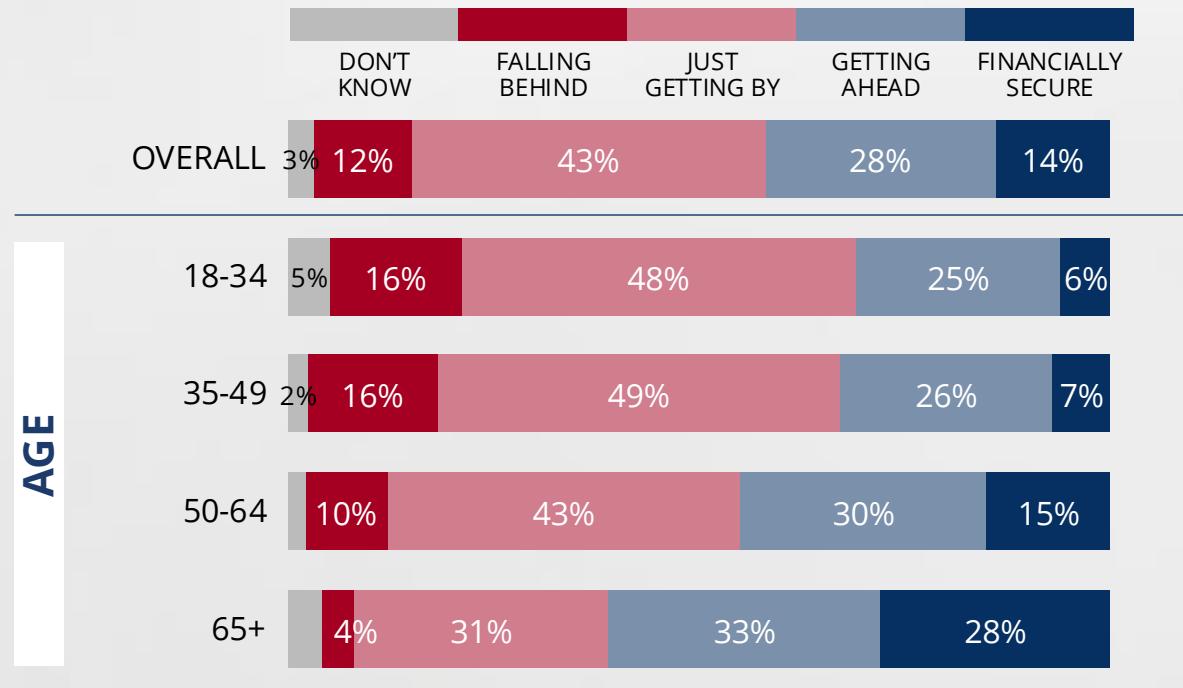


Personal Finances: Majority of Canadians still feel they are either barely managing or falling behind financially, rising by 3 pts

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.

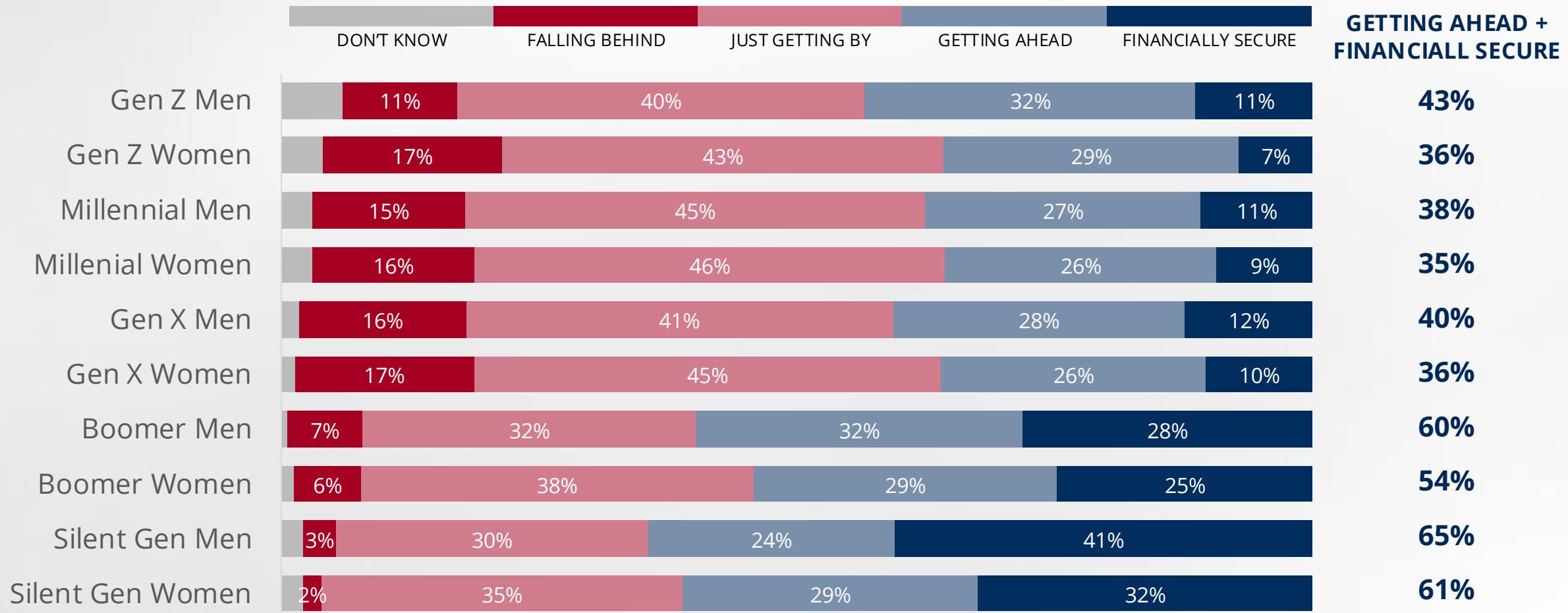
Cost of Living and Personal Financial Situation, Currently



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.

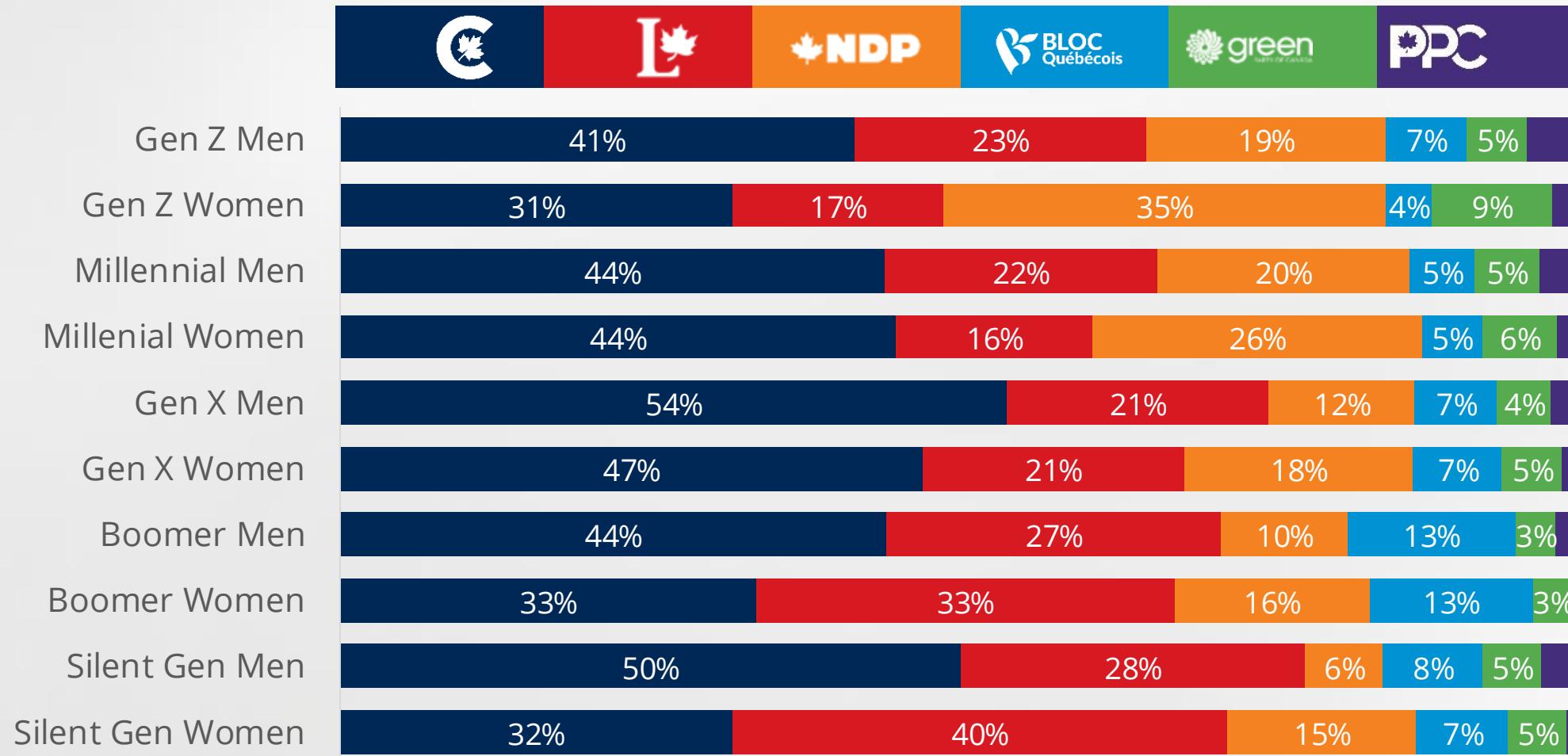
17



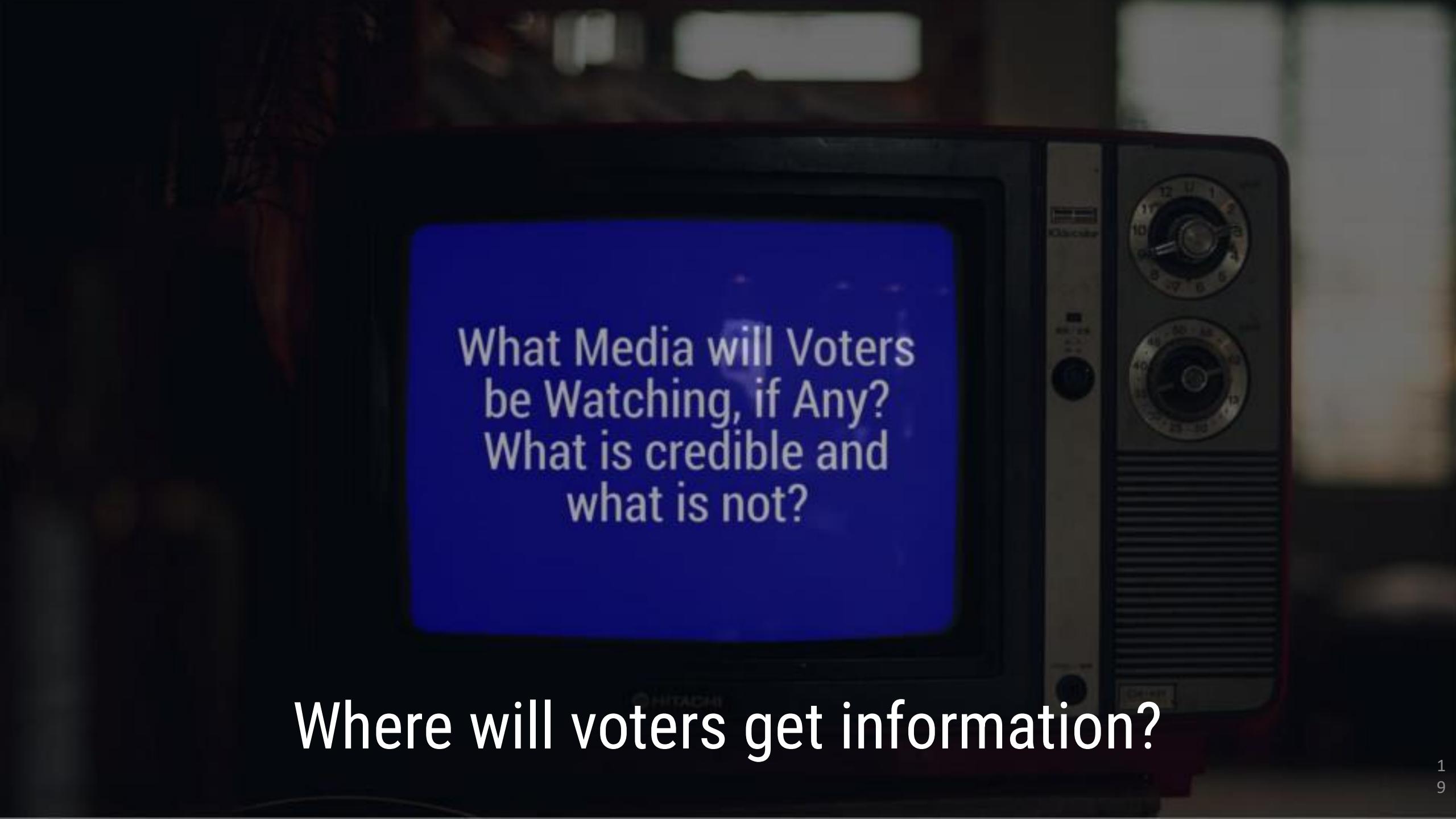
Thinking about the cost of living and your personal financial situation, are you currently... (January-June 2024, n=9524)

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

18



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



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

20

Sources of News – Among Men

Gen Z	Millennial	Gen X	Boomer	Silent Gen
Social media	52%	Social Media	41%	TV
Online news sites	27%	Newspapers (online)	27%	Radio
TV	24%	Websites	26%	Websites
Mobile news apps	24%	Mobile news apps	24%	Newspapers (online)
Newspapers (online)	20%	Radio	23%	Social media
			28%	Social media
				21%
				Email newsletters
				12%

Sources of News – Among Women

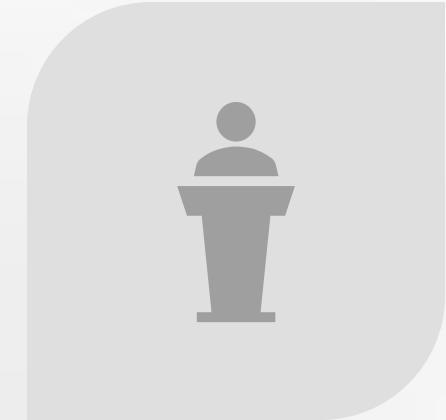
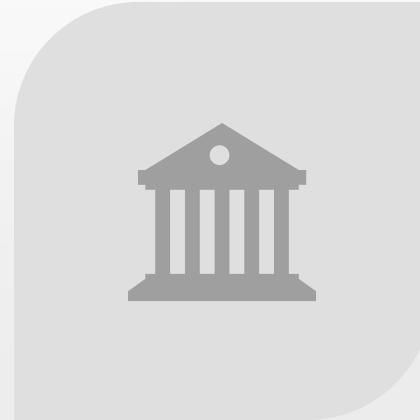
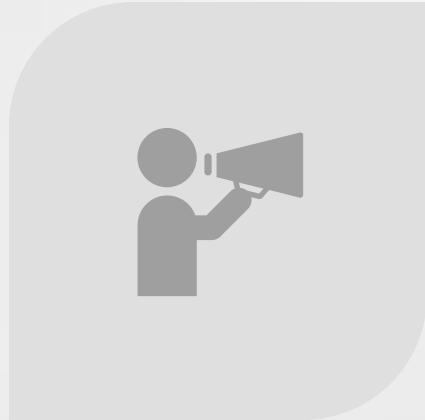
Gen Z	Millennial	Gen X	Boomer	Silent Gen
Social media	60%	Social Media	43%	TV
Mobile news apps	22%	TV	24%	Social media
Newspapers (online)	22%	Newspapers (online)	23%	Radio
TV	22%	Radio	23%	Newspapers (online)
Websites	17%	Websites	19%	Newspapers (online)
			22%	Websites
				Social media
			22%	Social 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

21



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.

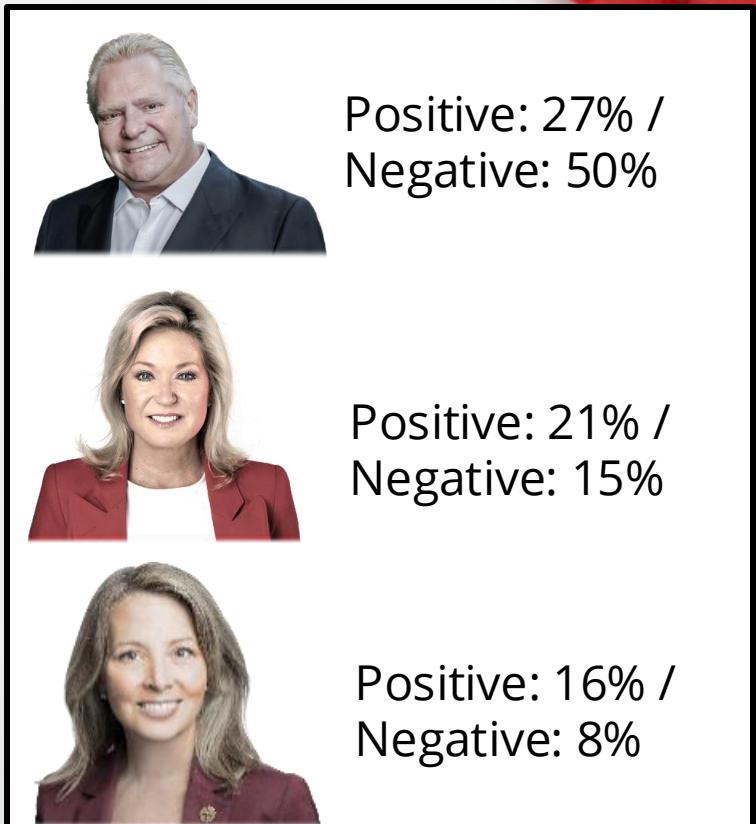
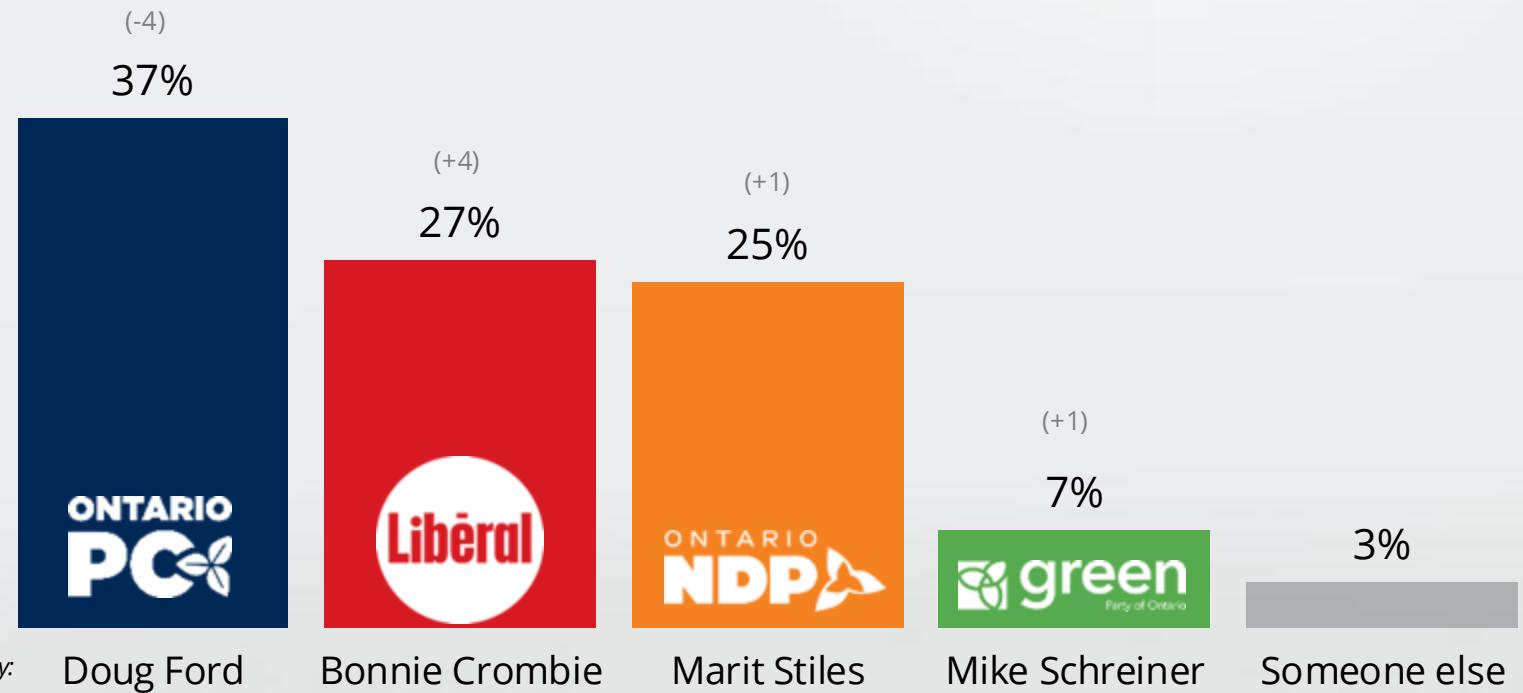
+15

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



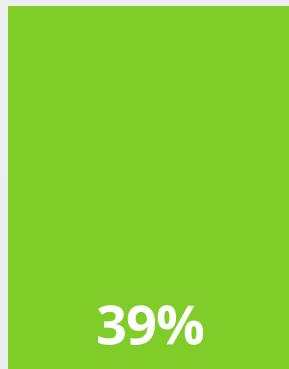
Ontario

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

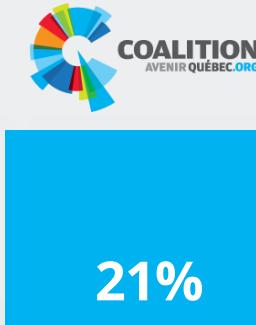


Quebec

- 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.



39%
The Parti
Québécois
led by Paul St-
Pierre Plamondon



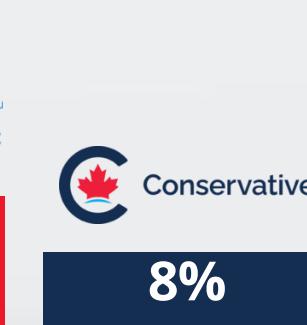
21%
The CAQ
led by François
Legault



16%
Québec solidaire,
led by Gabriel
Nadeau-Dubois



14%
The Quebec
Liberal Party
led by Marc
Tanguay



8%
The Conservative
Party of Quebec
led by Éric
Duhaime

1%
Someone else

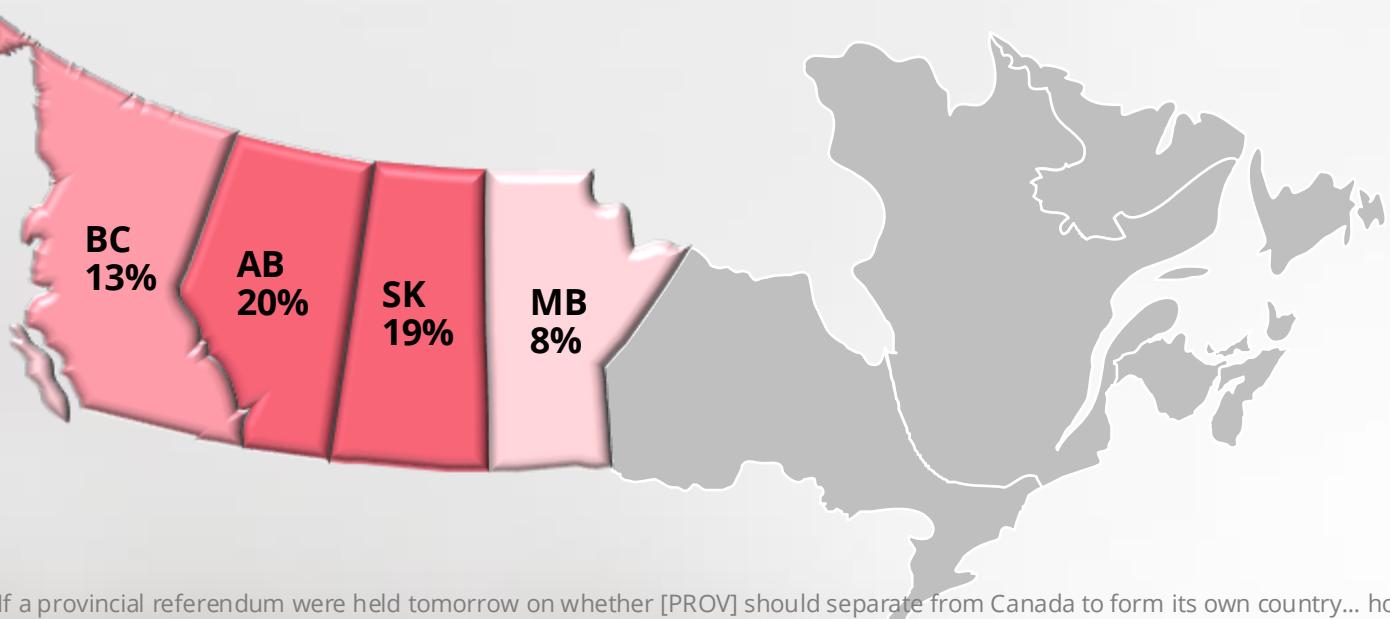


Who would you be most likely to vote for or lean towards if a provincial election were held today in Quebec? (November 2024, n=277)

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

Will a Trump Presidency be good or bad for Canada?

29

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





62%

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

Canadians nervous about the second Trump presidency

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



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

pollara
strategic insights