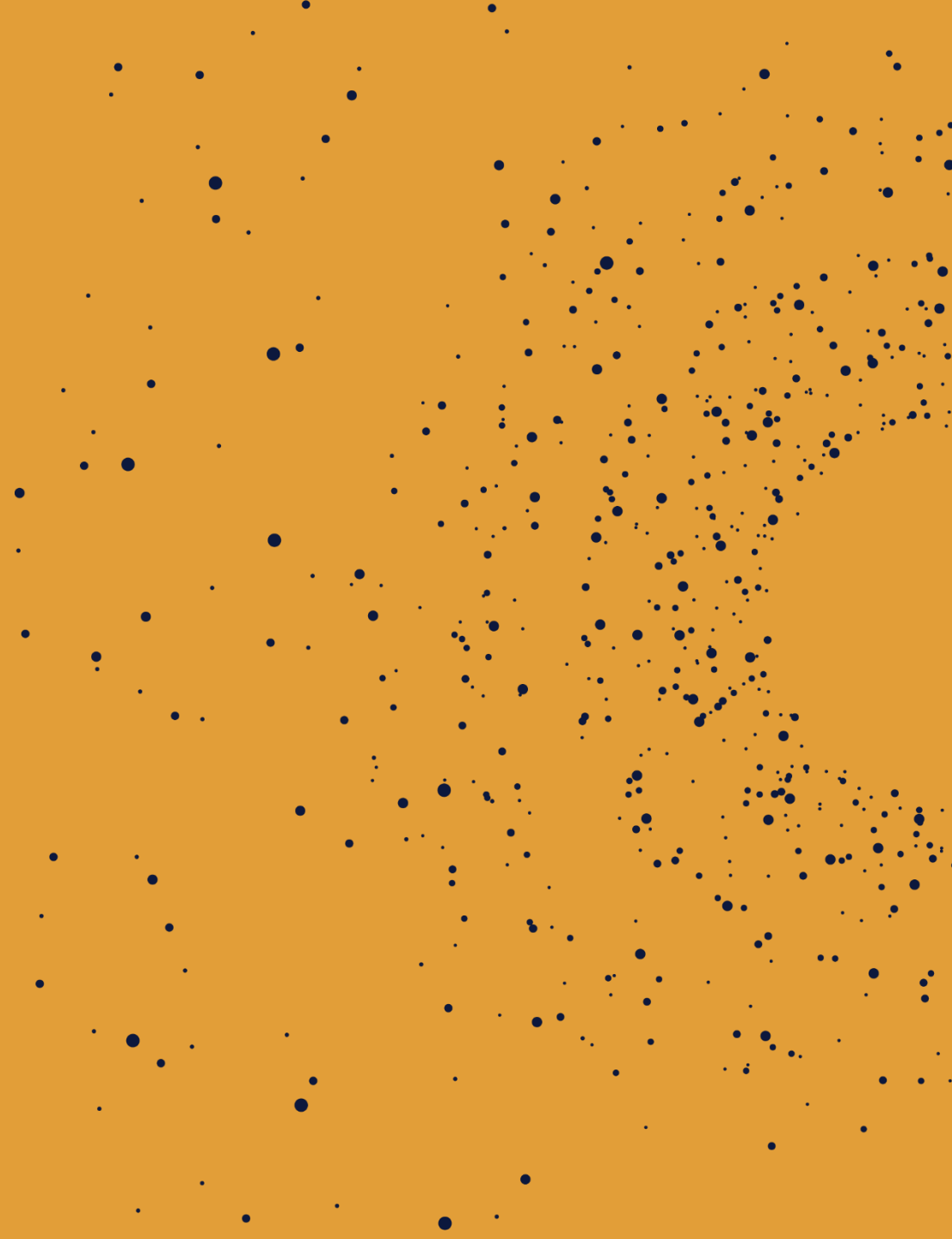




# A New Political Era

# **A New Chapter in Canadian Politics**



A man with a shocked or angry expression is shouting with his mouth wide open and hands raised. He is wearing a tan jacket over a light blue shirt. The background is a wall with several round analog clocks. One clock on the left has a small black label below it that says "LONDON".

**I'M MAD AS HELL**

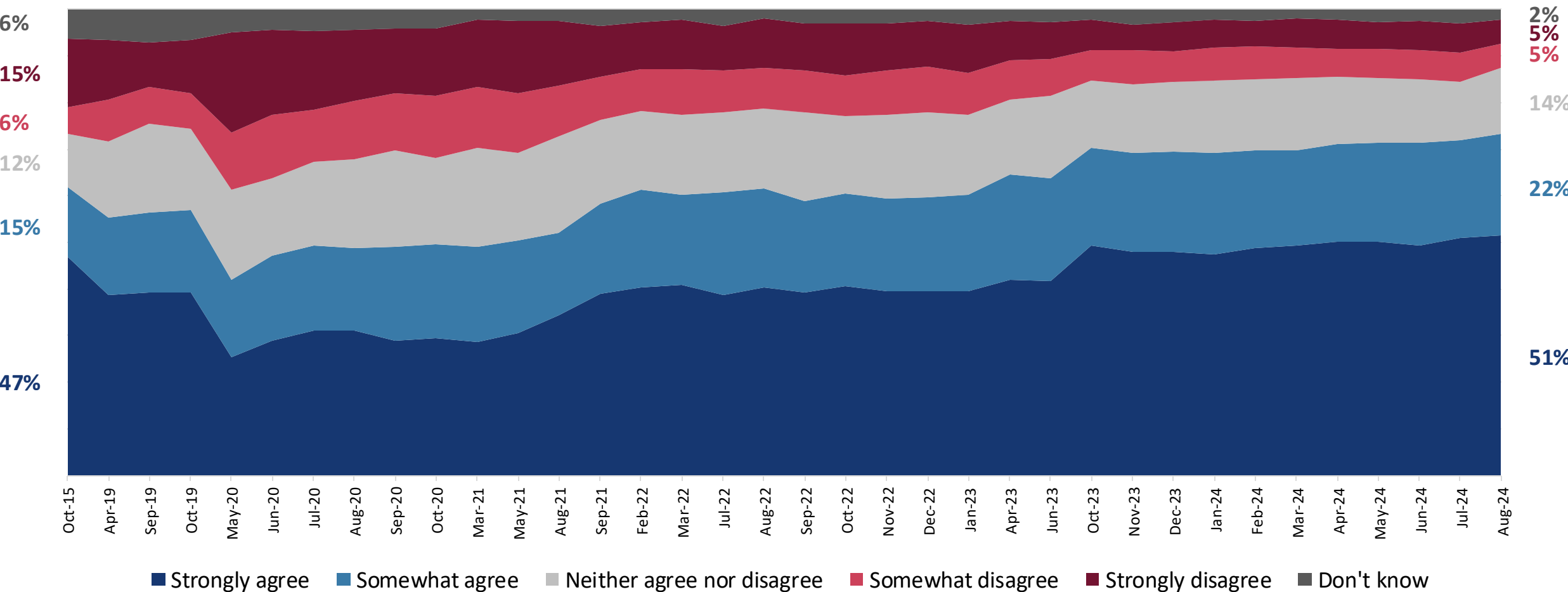
**AND I'M NOT GOING TO TAKE THIS ANYMORE!**

# National Time for Change Attitudes – Statement 1 (Tracking):

Time for Change now higher than ever recorded at 73%



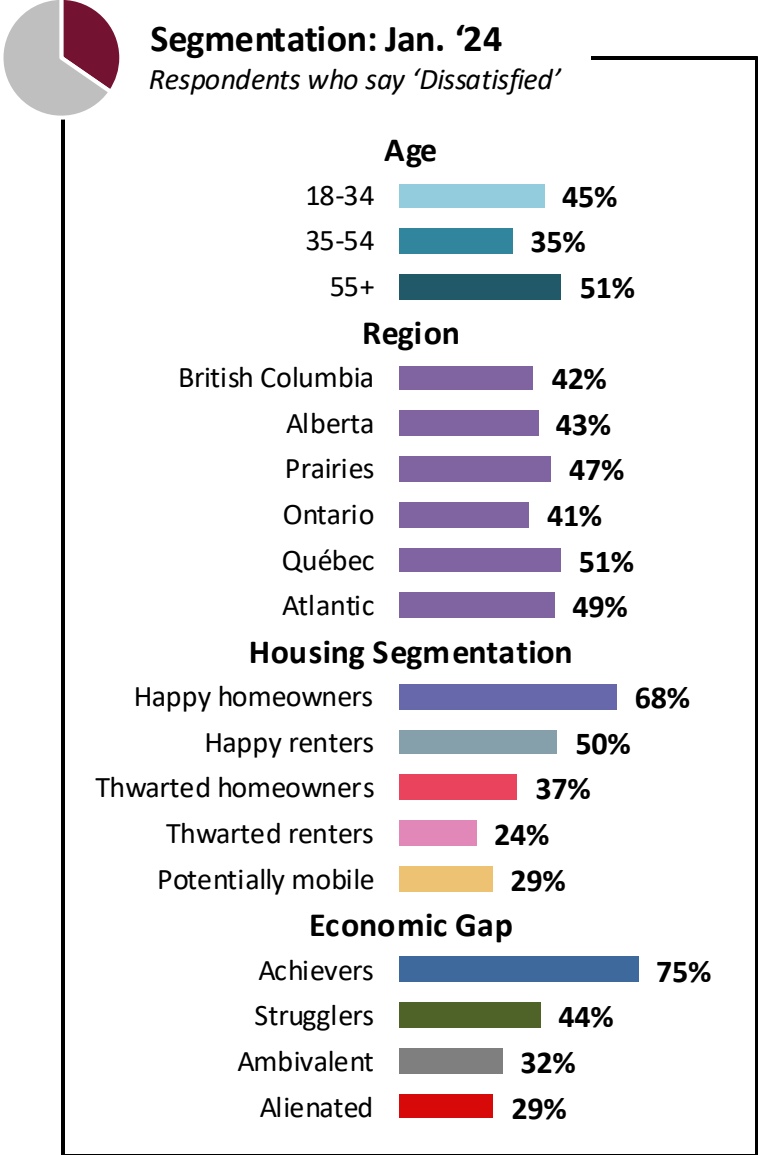
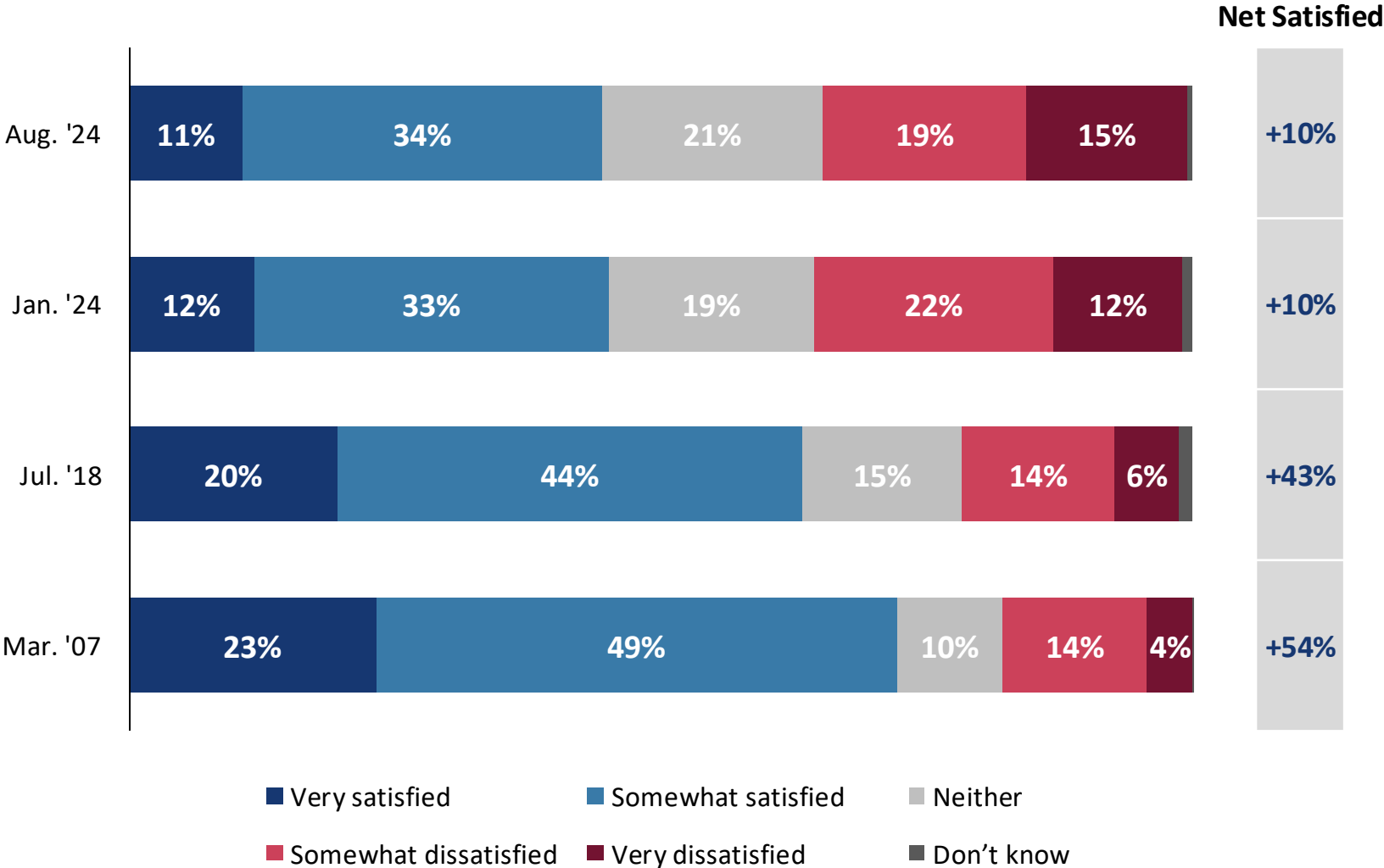
Do you agree or disagree with the following statements? - *It is time for a change in government here in Canada.*  
[asked of all respondents, n=3,000]



# Satisfaction with Standard of Living:

Net satisfaction with standard of living same as in Jan. '24, higher among Achievers and happy homeowners

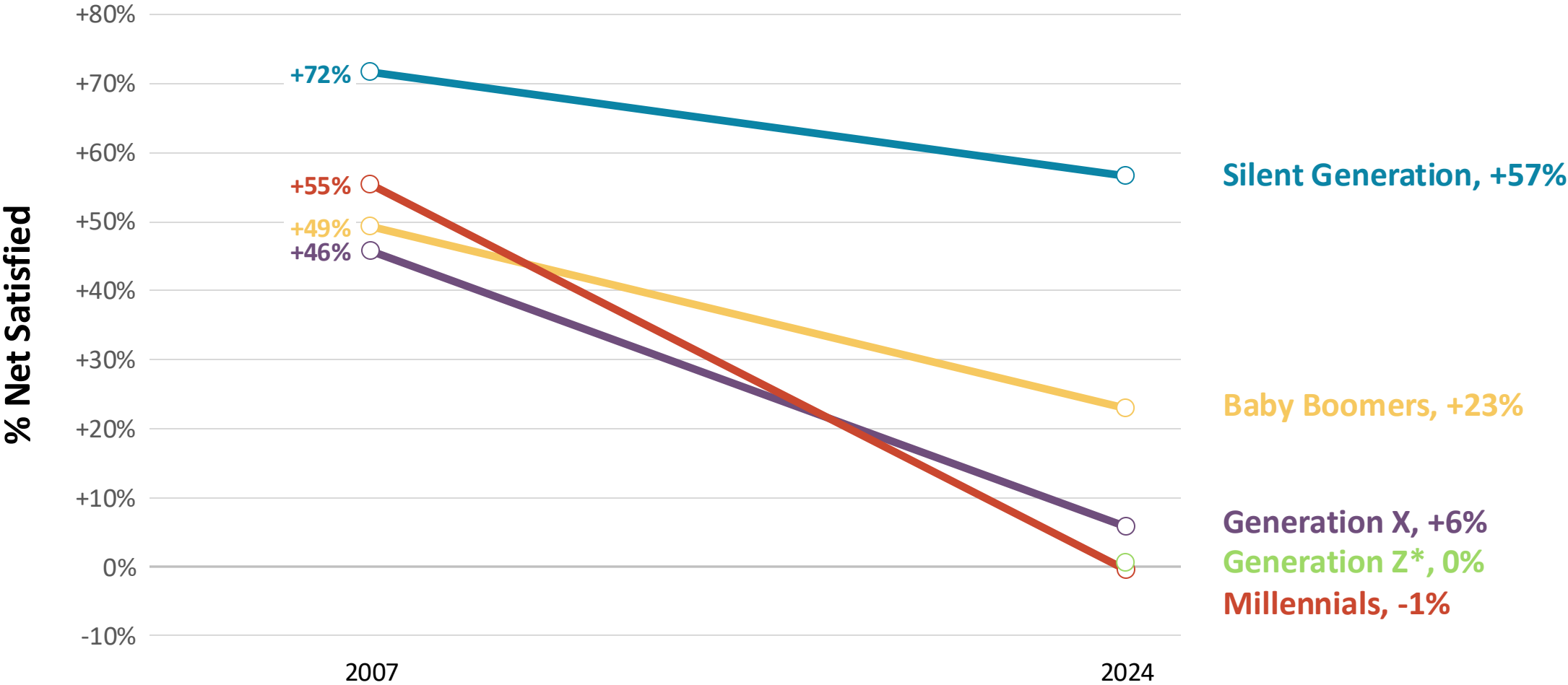
Q How satisfied are you with your current standard of living?  
[asked of all respondents, n=1,000]



# Satisfaction with Standard of Living Plummetts



How satisfied are you with your current standard of living?  
[asked of all respondents, January 2024 n=1,500]

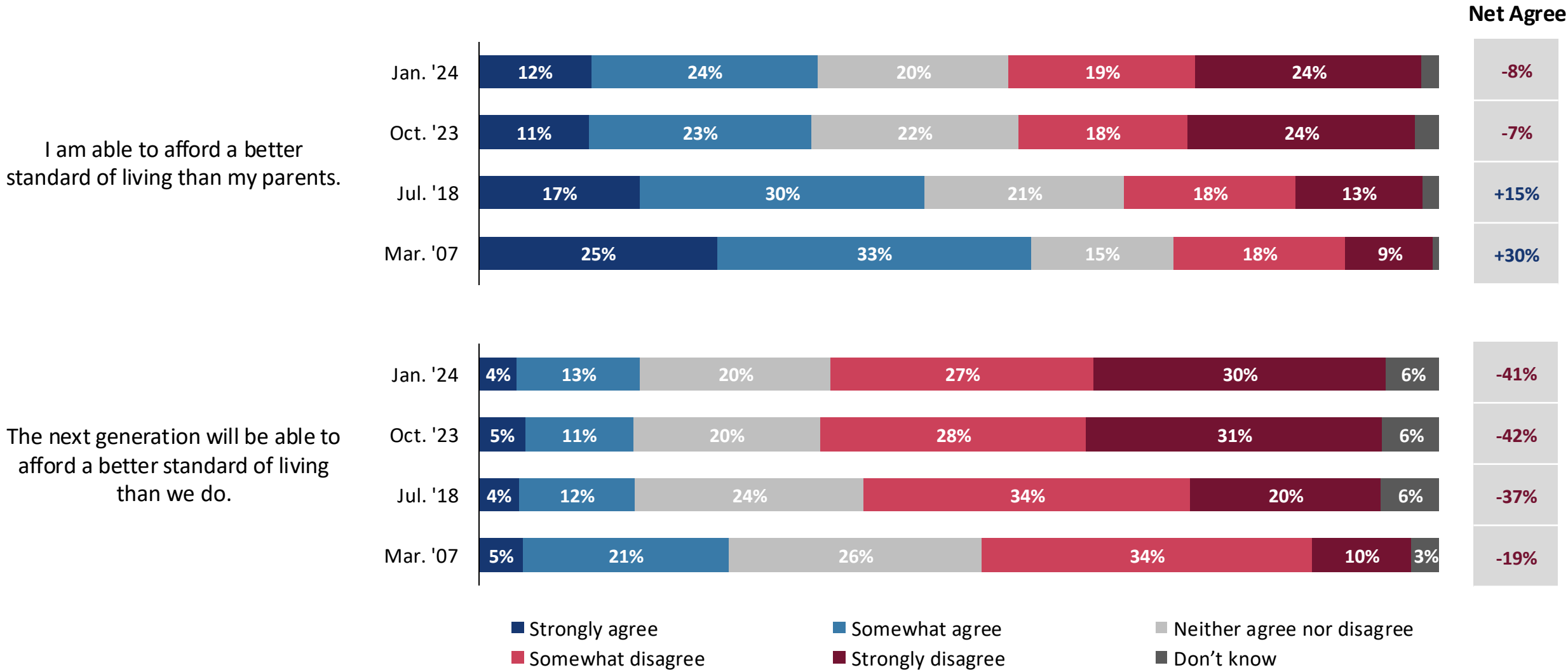


\*The group was not included in the 2007 survey because respondents were under the age of 18.

# Economic Outlook:

Net satisfaction with both statements steady since Oct. '23, but down since past years

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



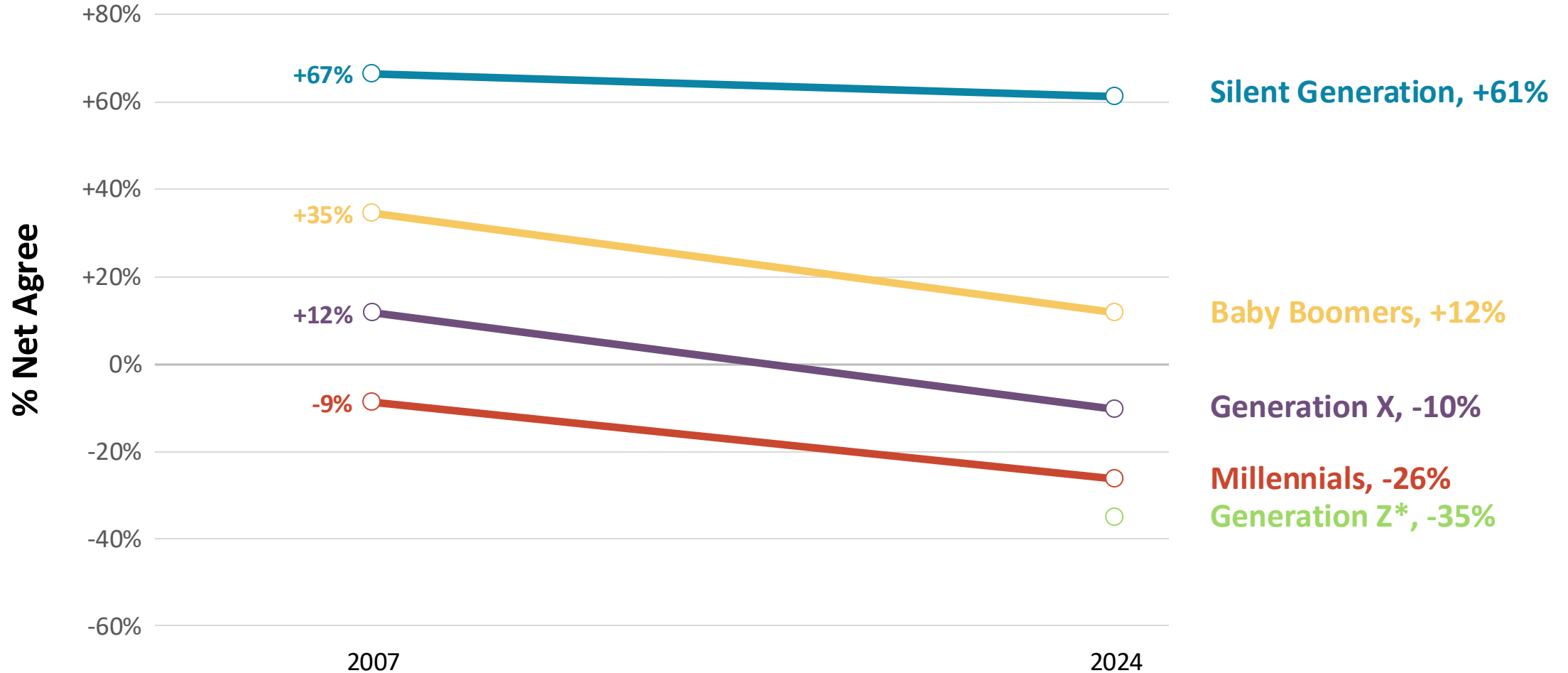
# Comparison to Past Generation by Generational Cohorts:

Net agreement to the statement decreased relatively equally for all generations except Silent Generation



Do you agree or disagree with the following statement:  
[asked of all respondents, n=1,500]

I am able to afford a better standard of living than my parents.



\*The group was not included in the 2007 survey because respondents were under the age of 18.

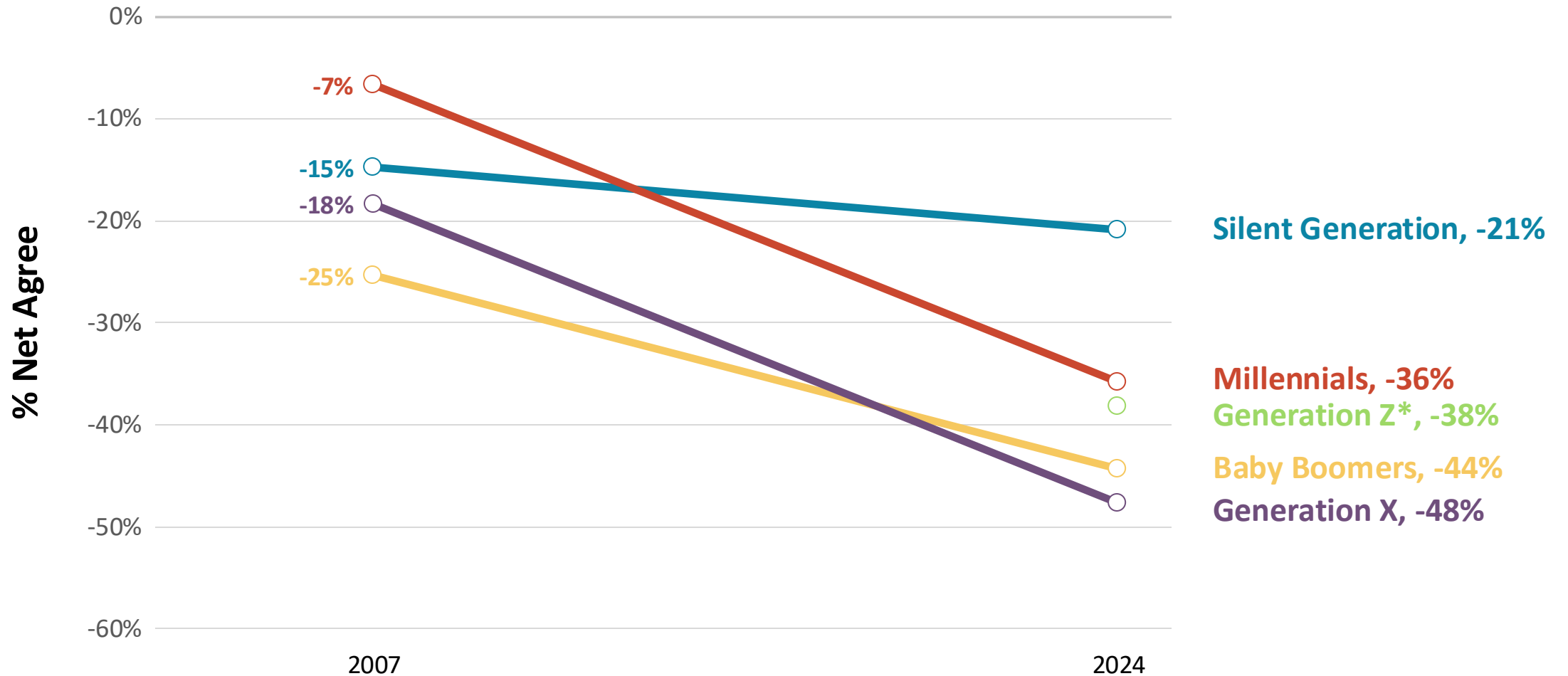
# Comparison to Past Generation by Generational Cohorts:

Net agreement to the statement decreased sharply for younger generations



Do you agree or disagree with the following statement:  
[asked of all respondents, n=1,500]

The next generation will be able to afford a better standard of living than we do.



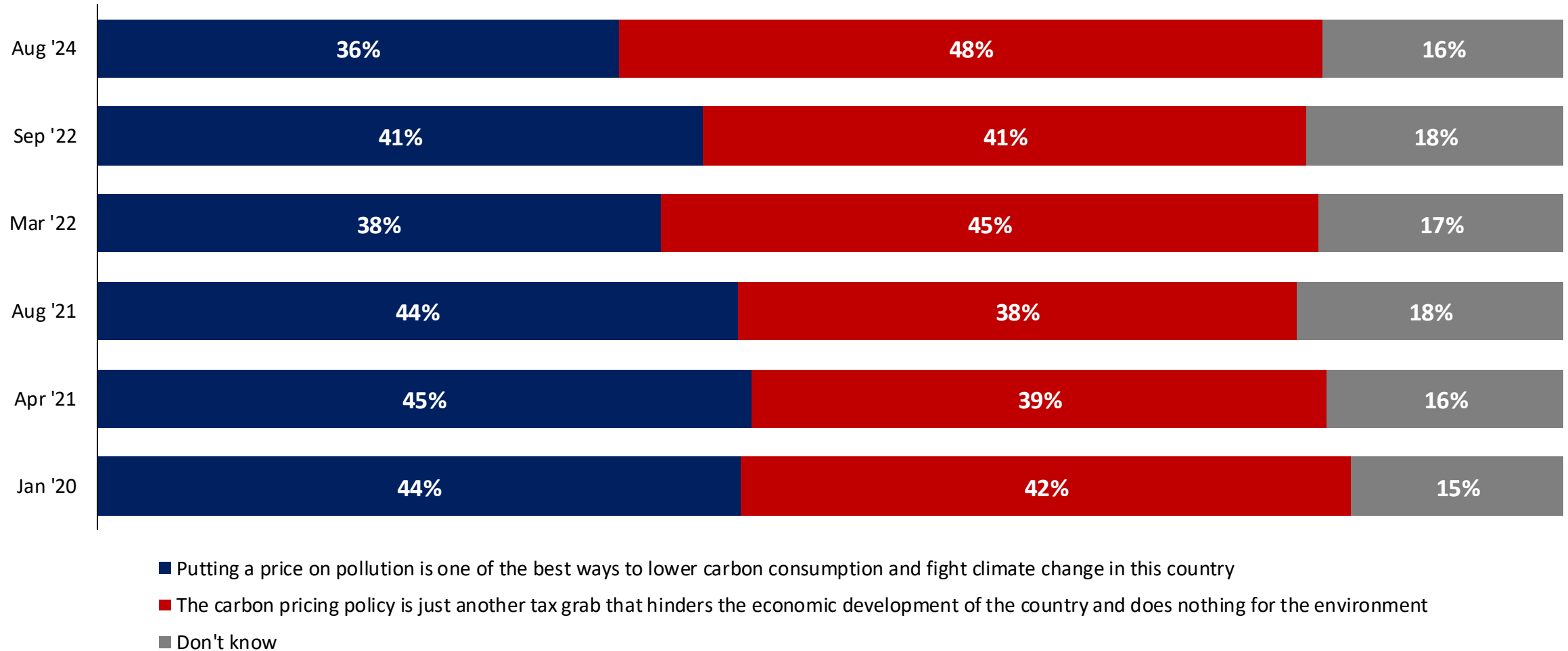
\*The group was not included in the 2007 survey because respondents were under the age of 18.

# This is driving a shift from post material concerns to more focus on materialism

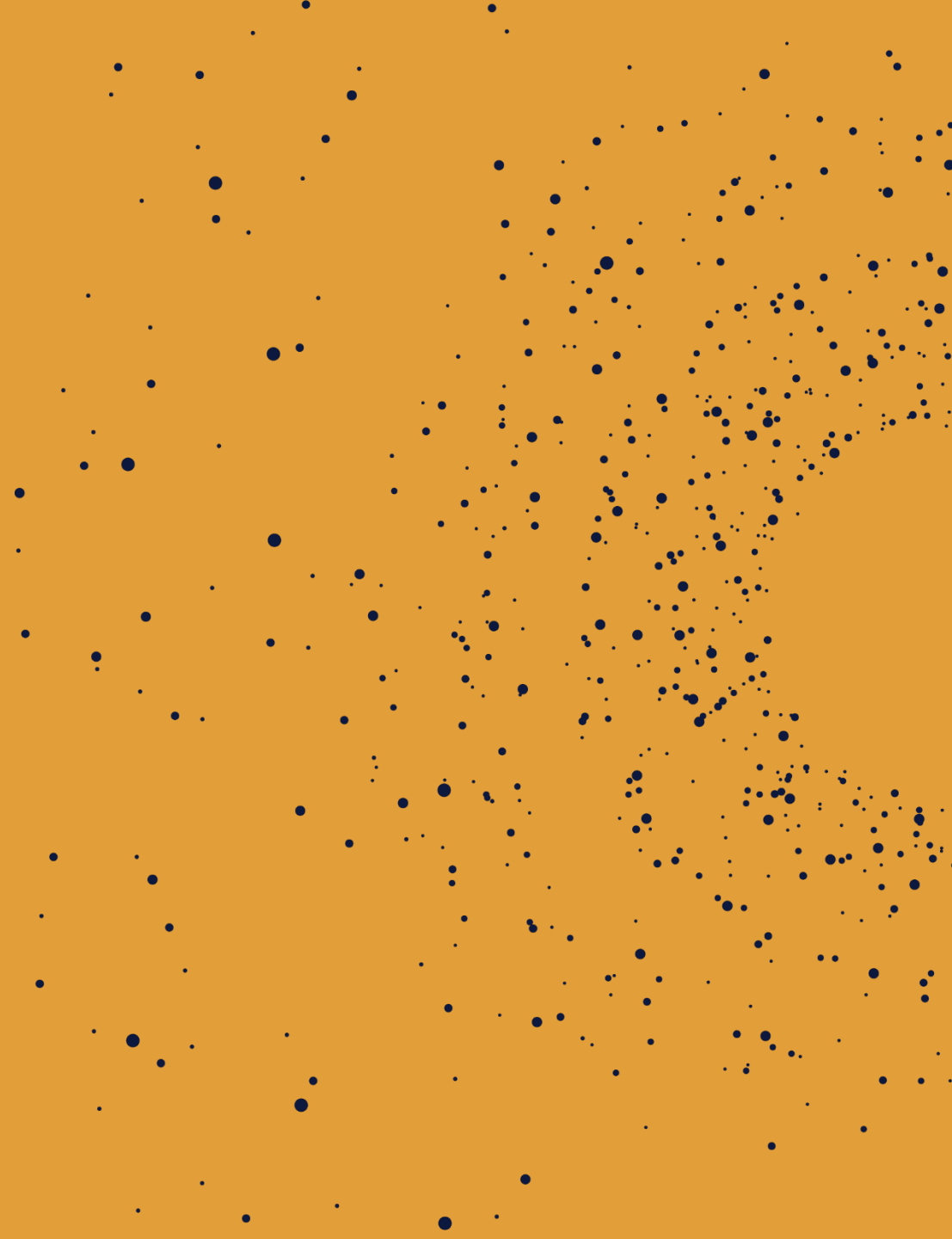


Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?

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



# Housing Experience

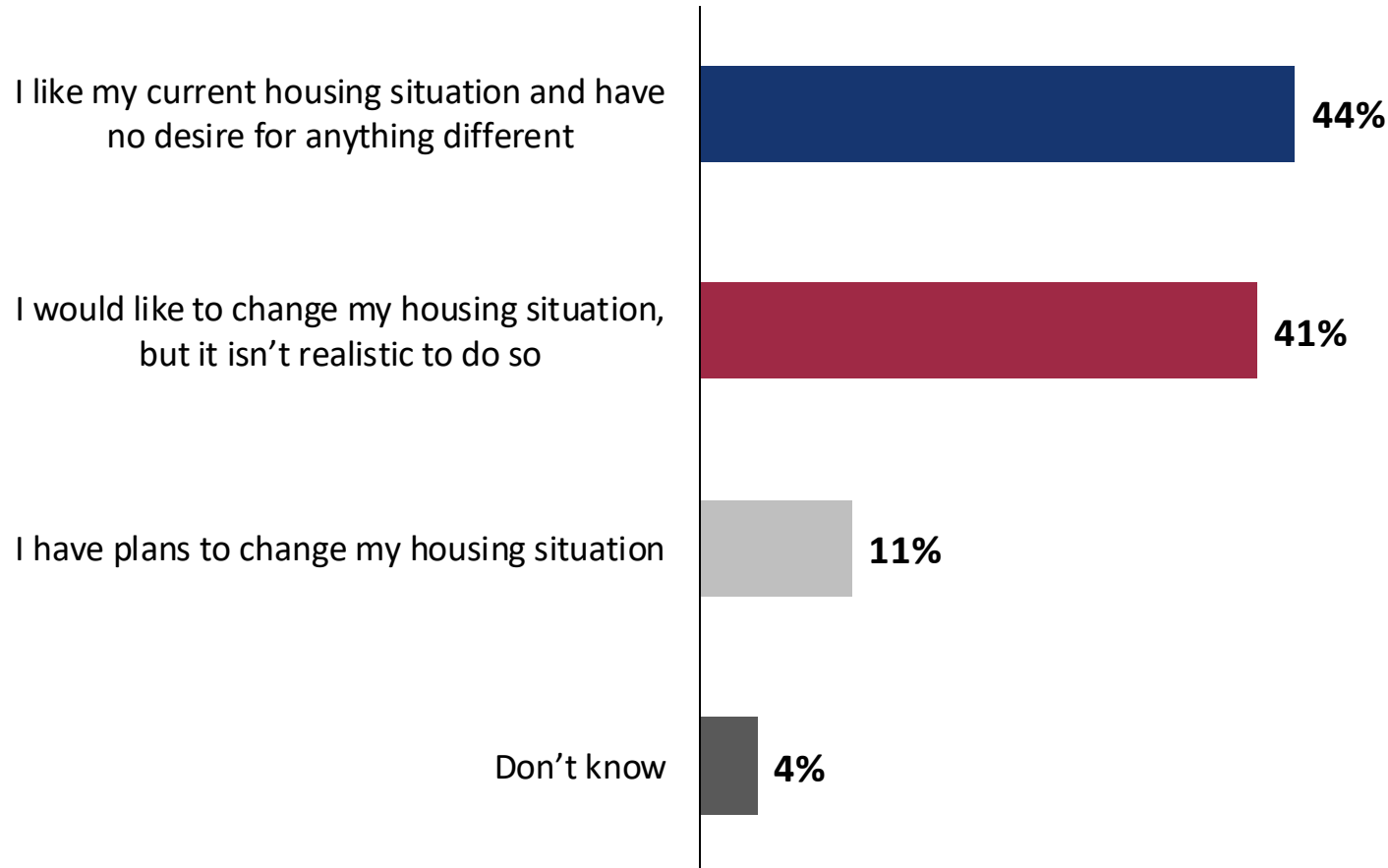


# Housing Situation Outlook:

41% would like to change their housing situation, but it isn't realistic to do so; young people more likely to say so



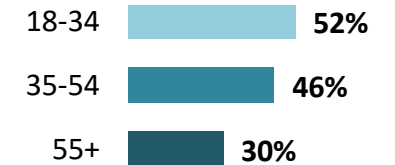
We would like to share three statements that reflect what we hope for in our housing situation, and what we expect when we consider our situation. Please indicate which of these statements best reflects your point of view.  
[asked of all respondents, n=1,000]



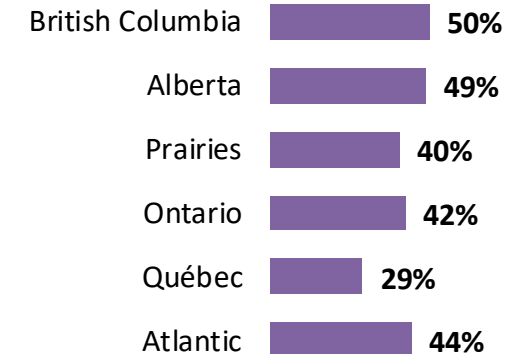
## Segmentation: Aug. '24

Respondents who say 'Not realistic'

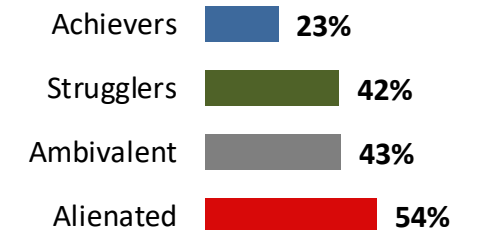
### Age



### Region



### Economic Gap



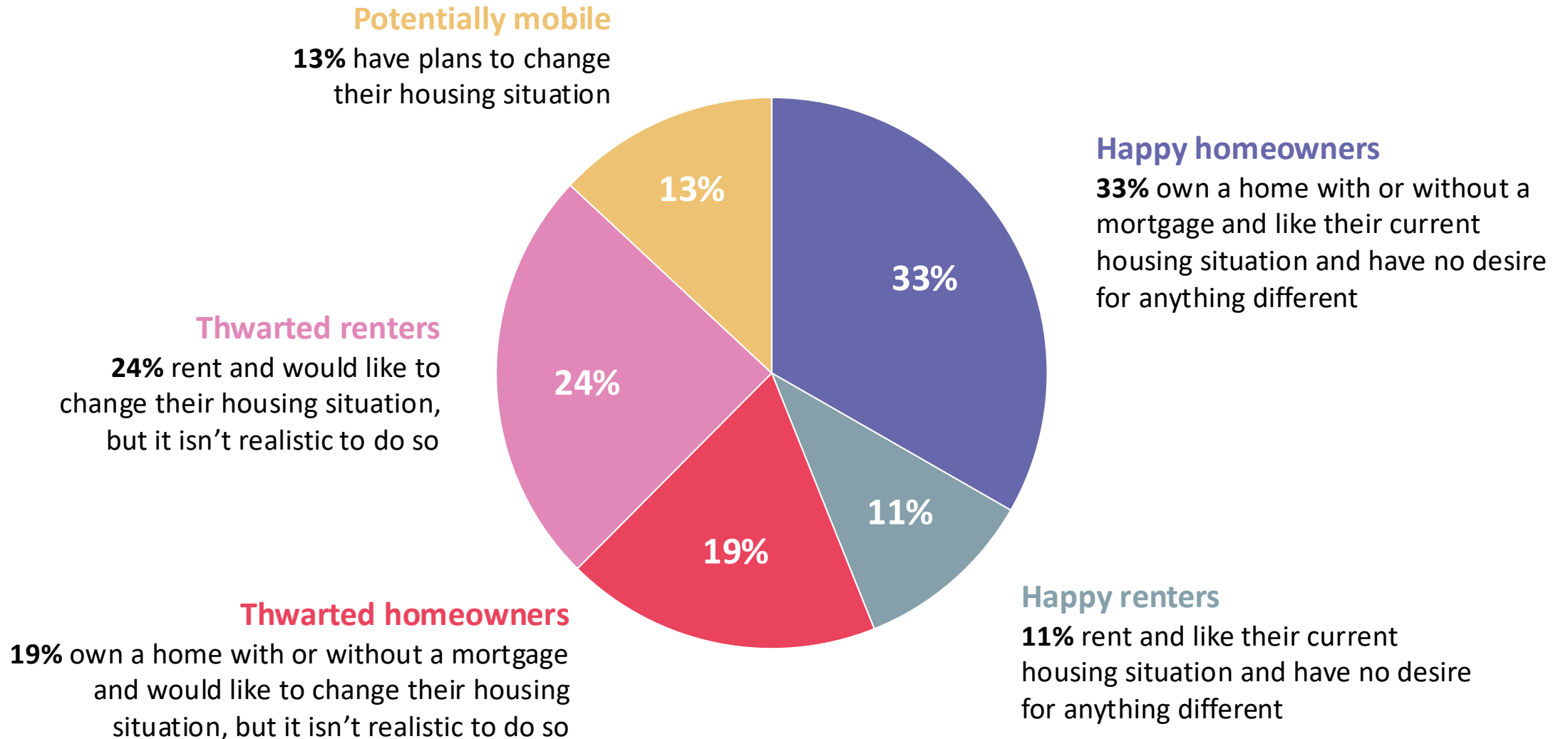
# Housing Segmentation:

1-in-3 qualify as happy homeowners; 1-in-4 are thwarted renters



Housing Segmentation:

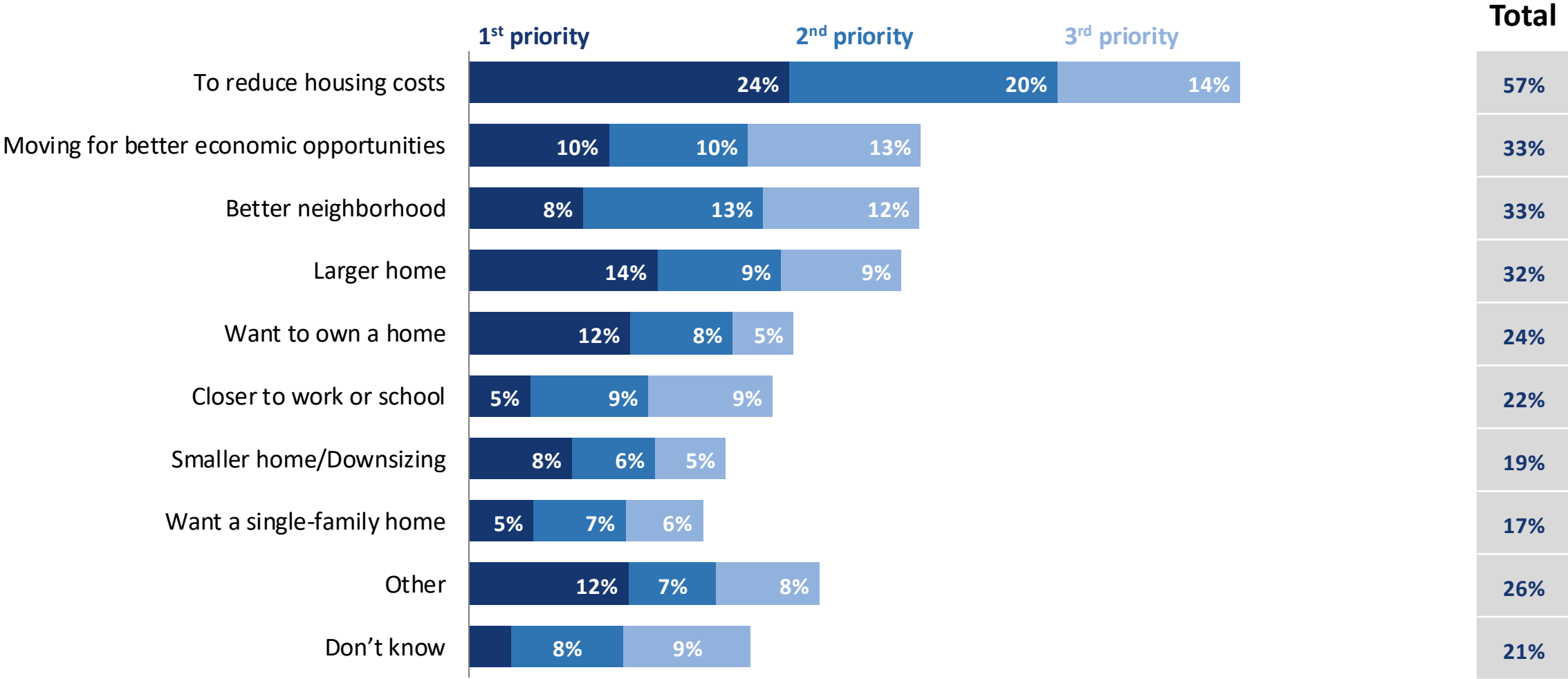
[asked of all respondents, n=854]



# Motives for Change:

Reducing housing costs is a top reason for change with over 57% saying it is among top three priorities

Q Which of the following is the most important reason you would like to change your current situation?  
[asked of those who would like to change their housing situation, but it is not realistic to do so, n=409]

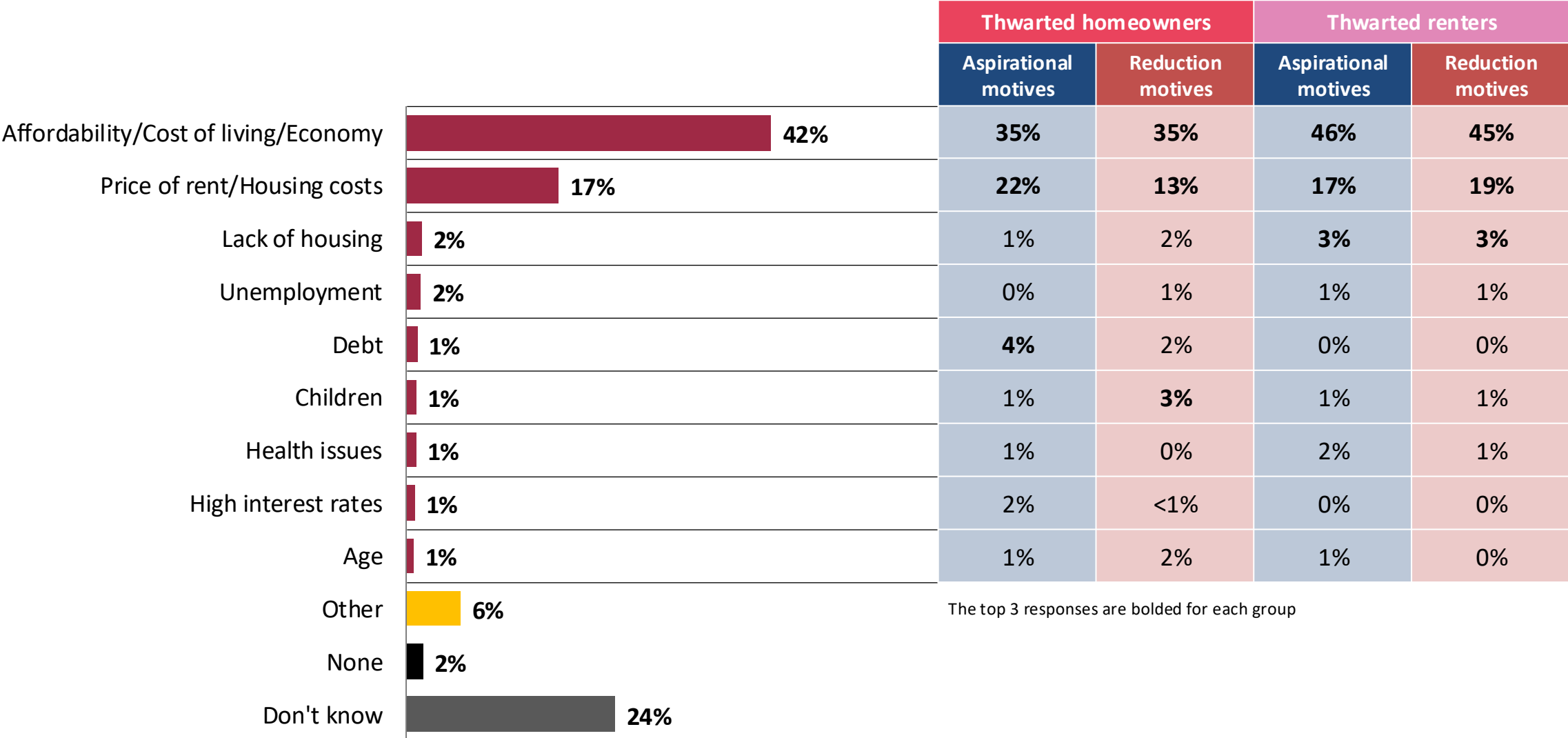


**Note:** Respondents who say *Don't know* are not asked to name further priorities.

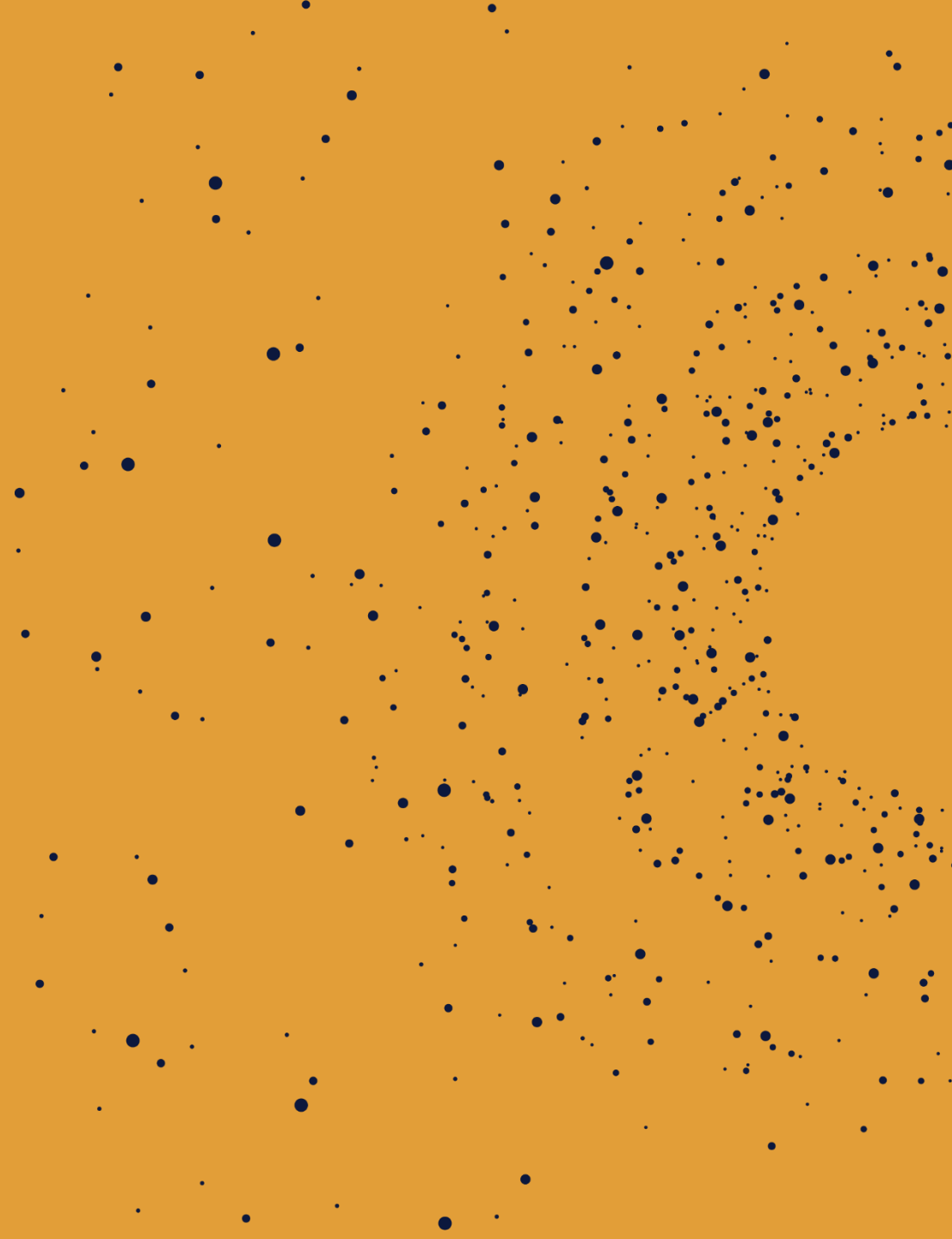
# Barriers to Change by Housing Segmentation and Motives for Change:

Affordability and price of rent top two barriers holding nearly 60% back

Q Is there anything in particular holding you back from changing your housing situation?  
[asked of those who would like to change their housing situation, but it is not realistic to do so, n=409]



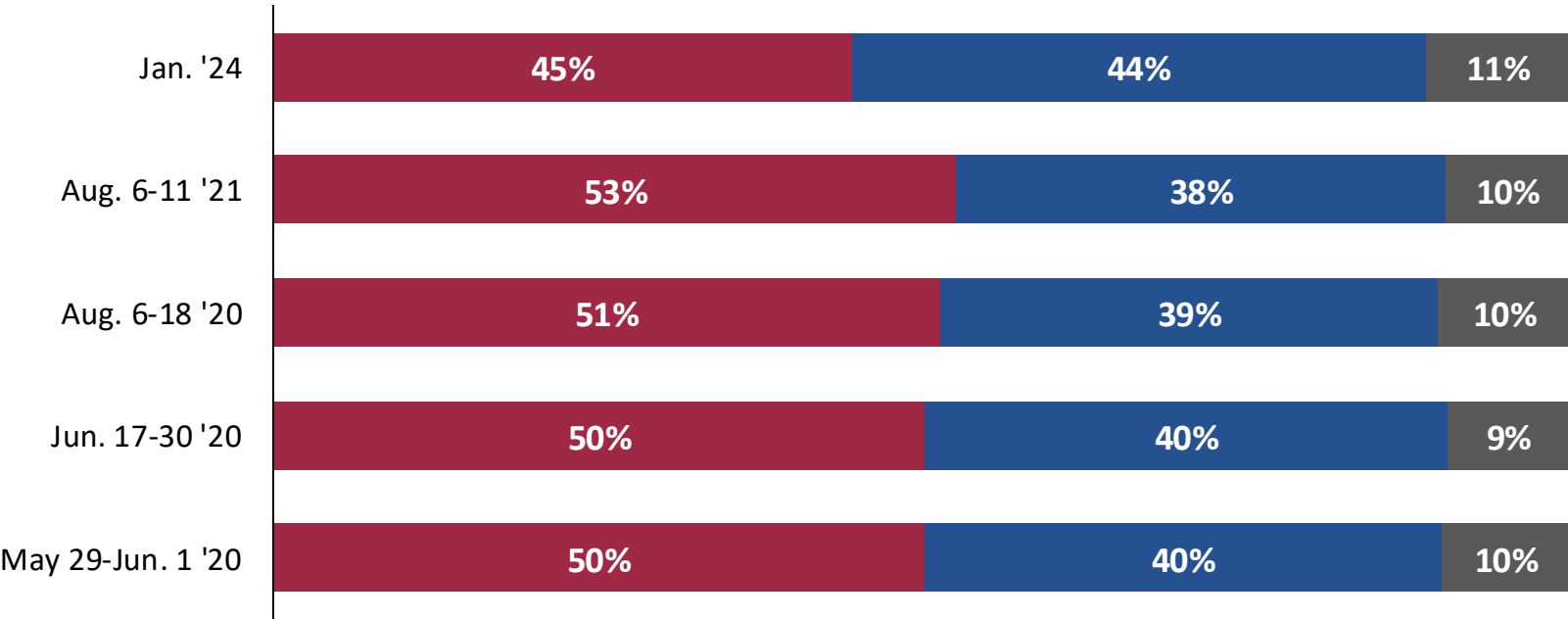
# Economic Attitudes



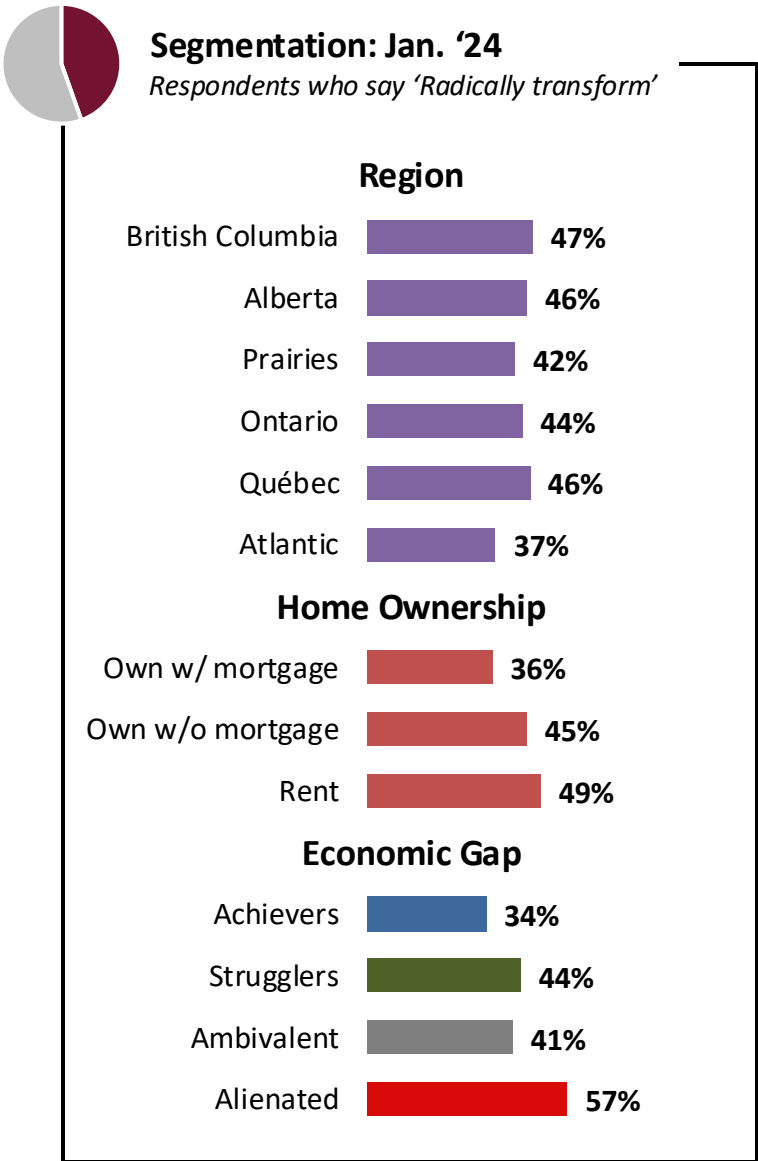
# Transforming the Economy:

The share of those saying 'radically transform' down by 8 points since 2021, highest among Alienated

Q During the COVID-19 pandemic, there emerged a discussion about the government's general approach to the economy. Which of the following comes closest to your point of view?  
[asked of all respondents, n=1,500]

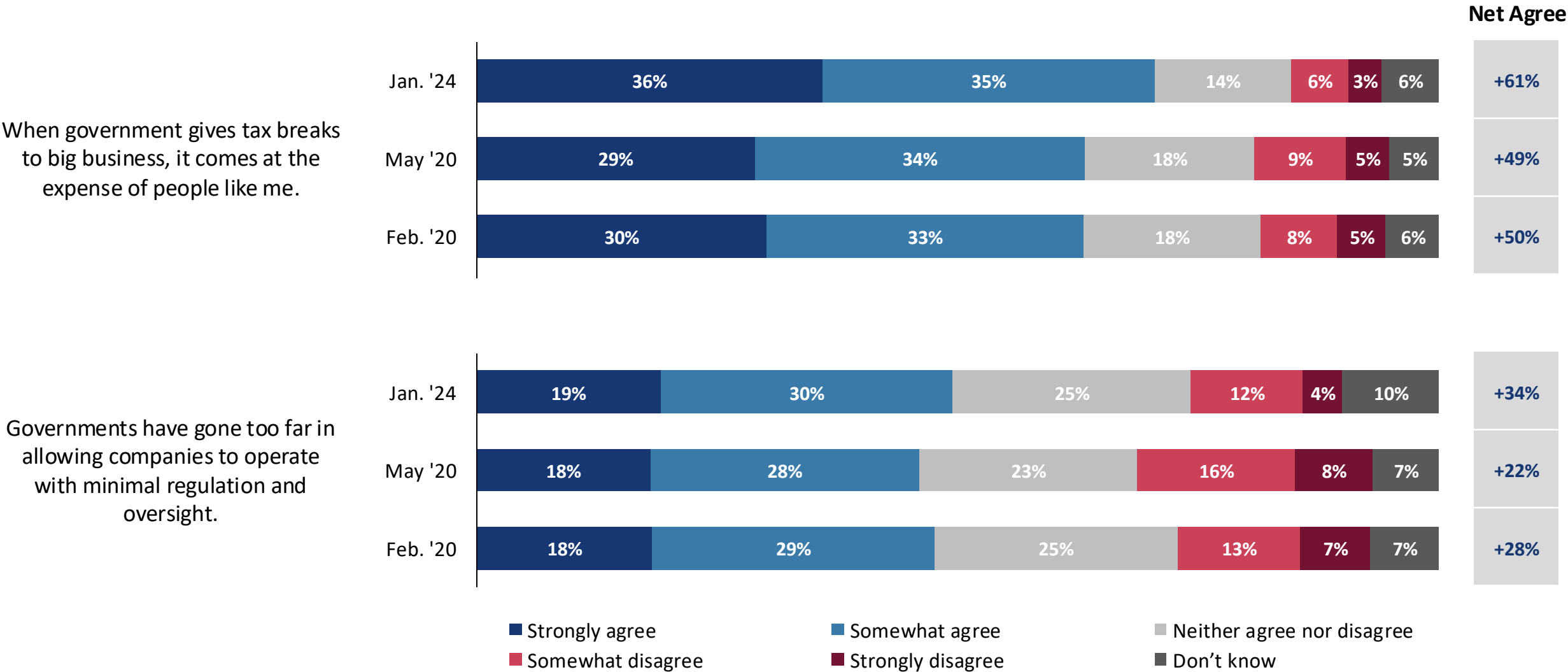


- The COVID-19 pandemic showed that we need to radically transform our economy to work differently in the future
- There is always room for improvement, but the economy was working pretty well before the COVID-19 pandemic
- Don't know



# It is not a given that the political response to the standard of living crisis will be pro-business

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



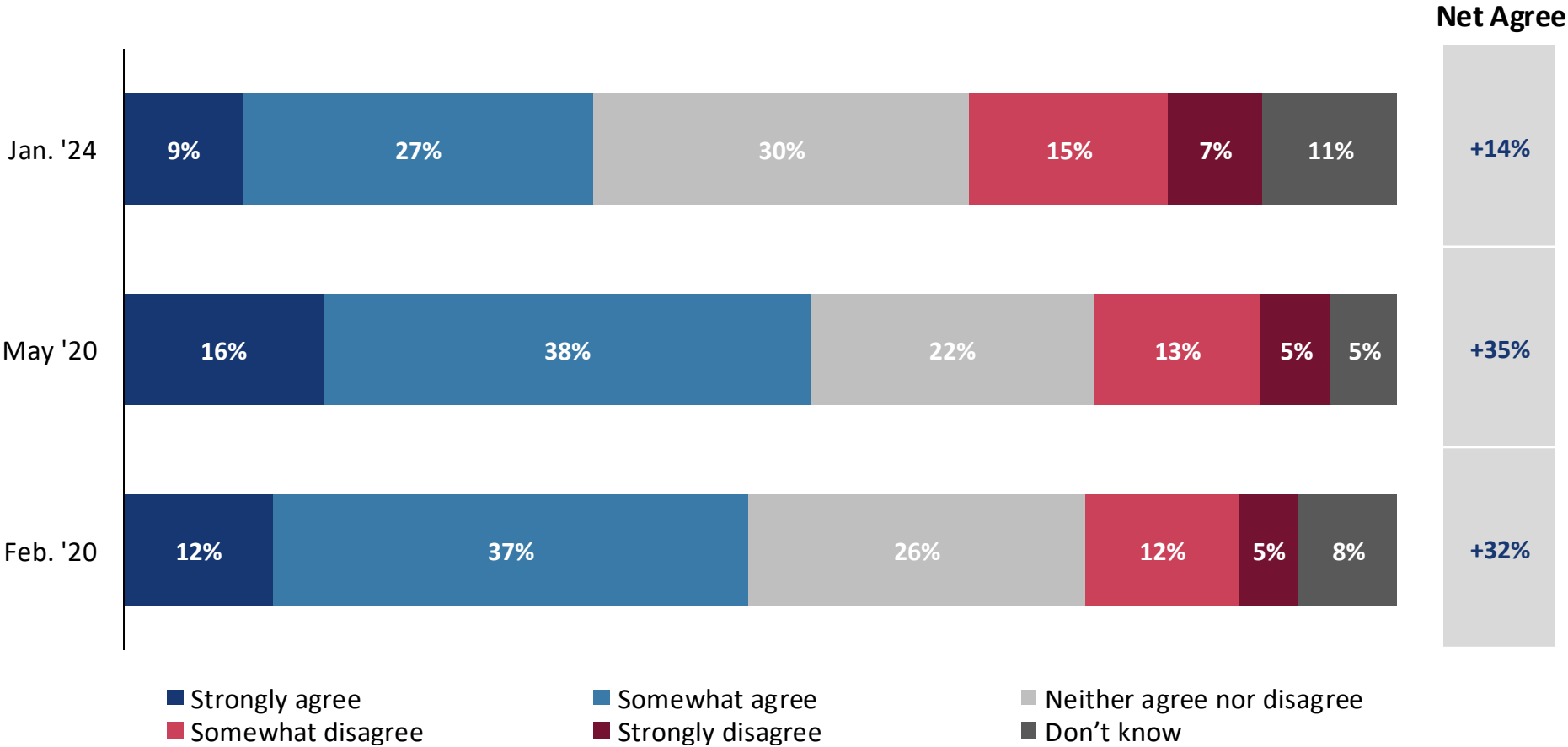
# Economic Attitudes (Part 1):

More people now believe that most government economic programs do more harm than good



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

On the whole, our free enterprise economic system works pretty well.



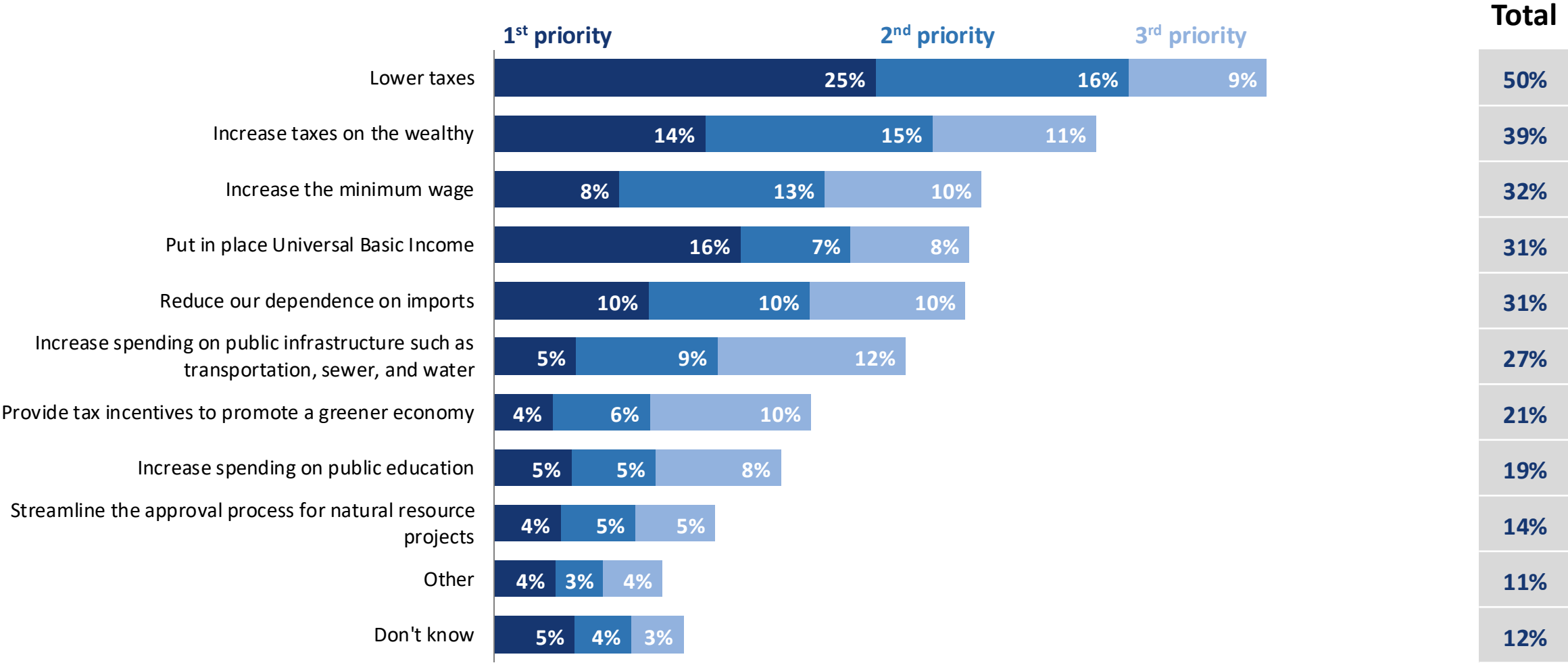
# Top Policy Initiatives:

## Lowering taxes is a top policy priority, followed by increasing taxes on the wealthy



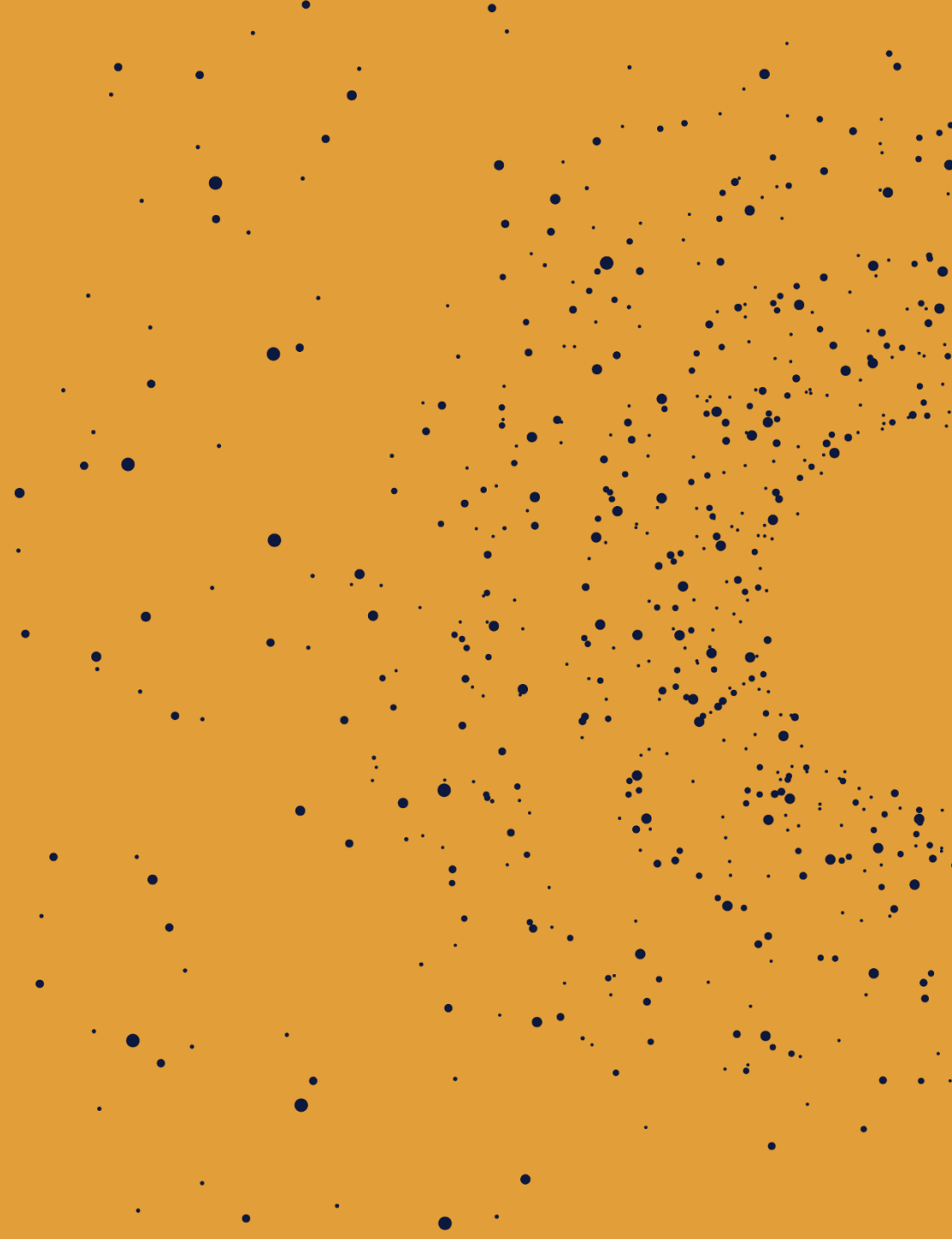
When we talk about transformation, which of the following is the most important change to you? And which is the second most important to you? And which is the third most important to you?

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



**Note:** No response not shown. Respondents who say *Don't know* are not asked to name further priorities.

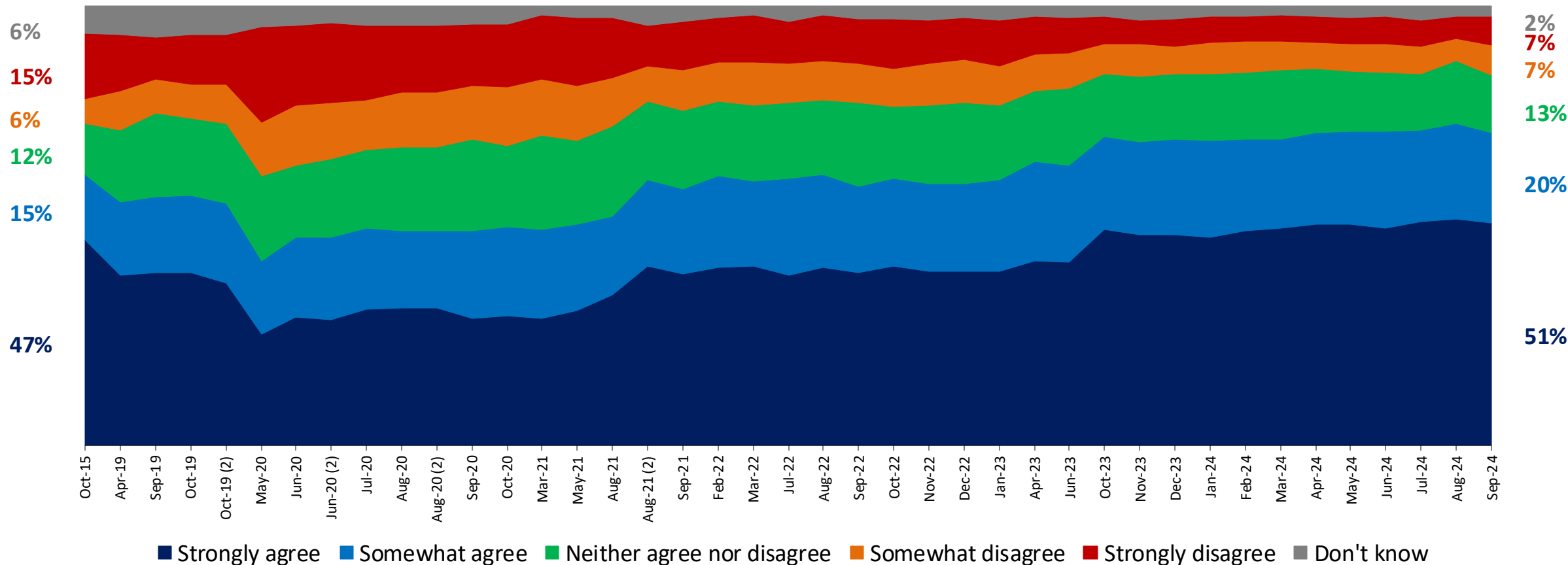
# Federal Implications



# Time for Change Tracking:



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=2000]

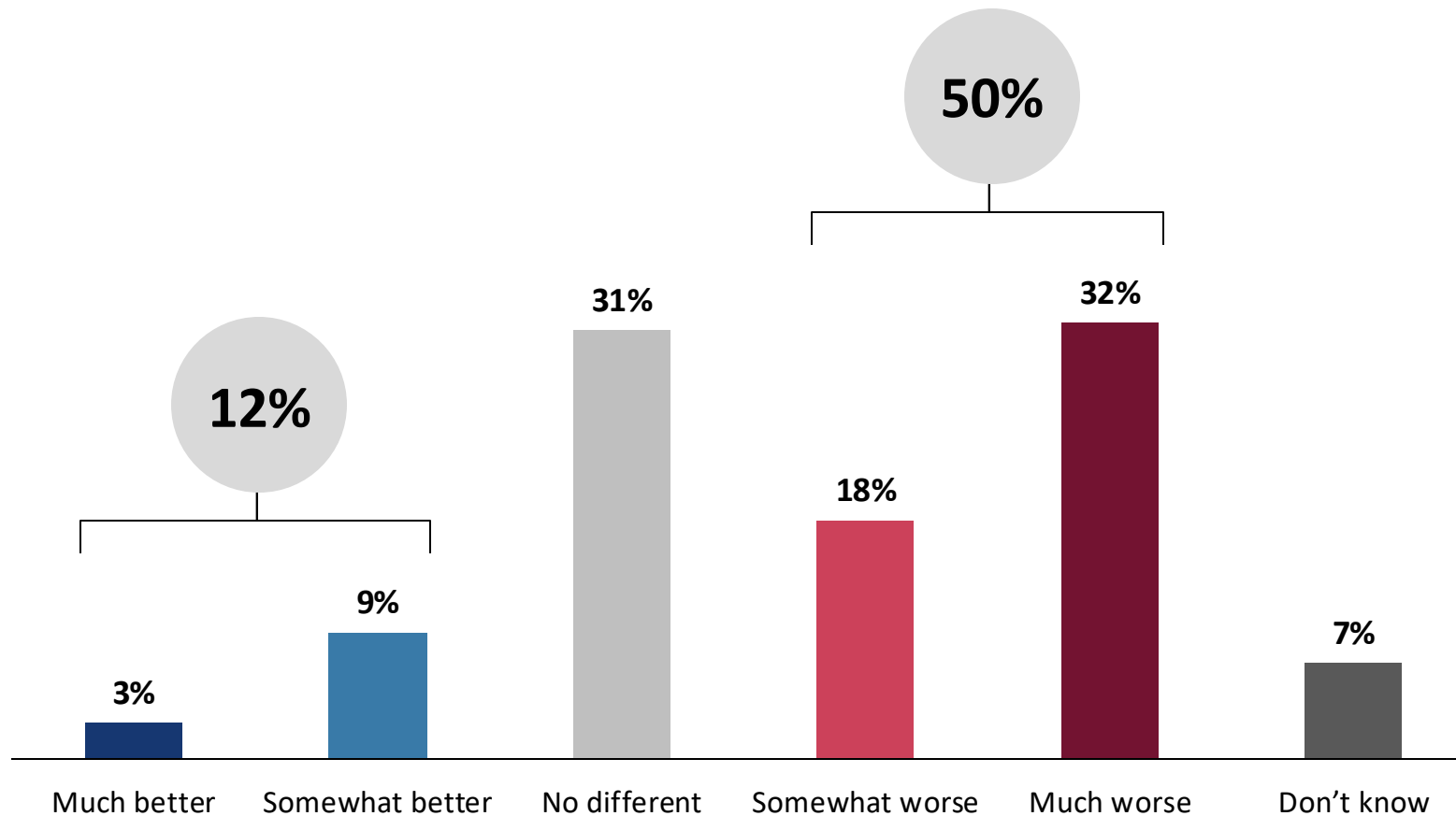


# Half Say Feds Making Things Worse for Them, Only 12% Say Better



Overall, do you think this federal government is making things better or worse for people like you?

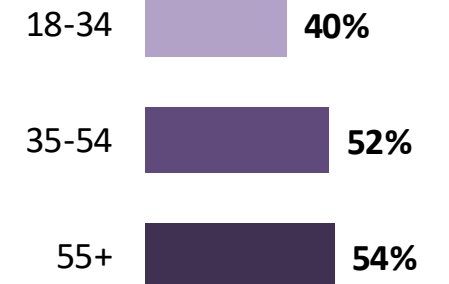
[asked of all respondents, March 2024, n=1,500]



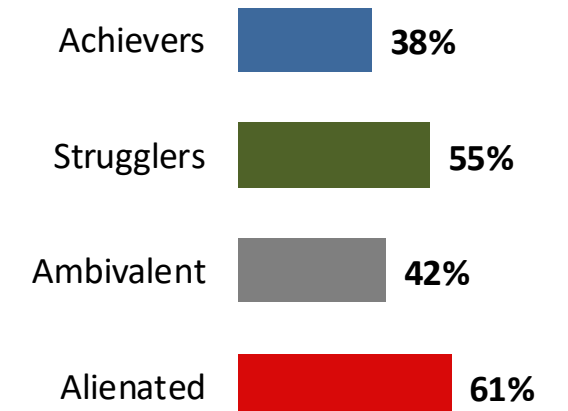
**Segmentation: Mar. '24**

*Respondents who say 'Worse'*


## Age

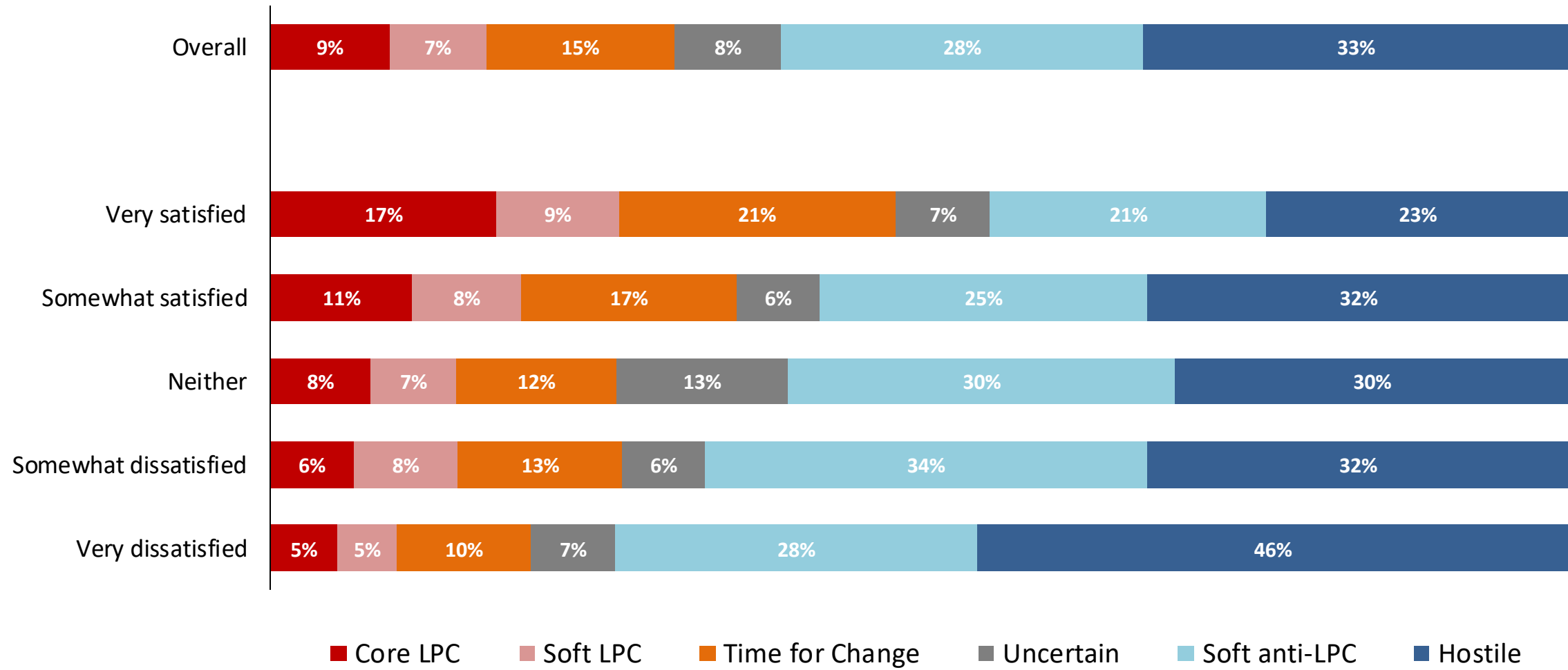


## Economic Gap



# Satisfaction with Standard of Living drives federal vote

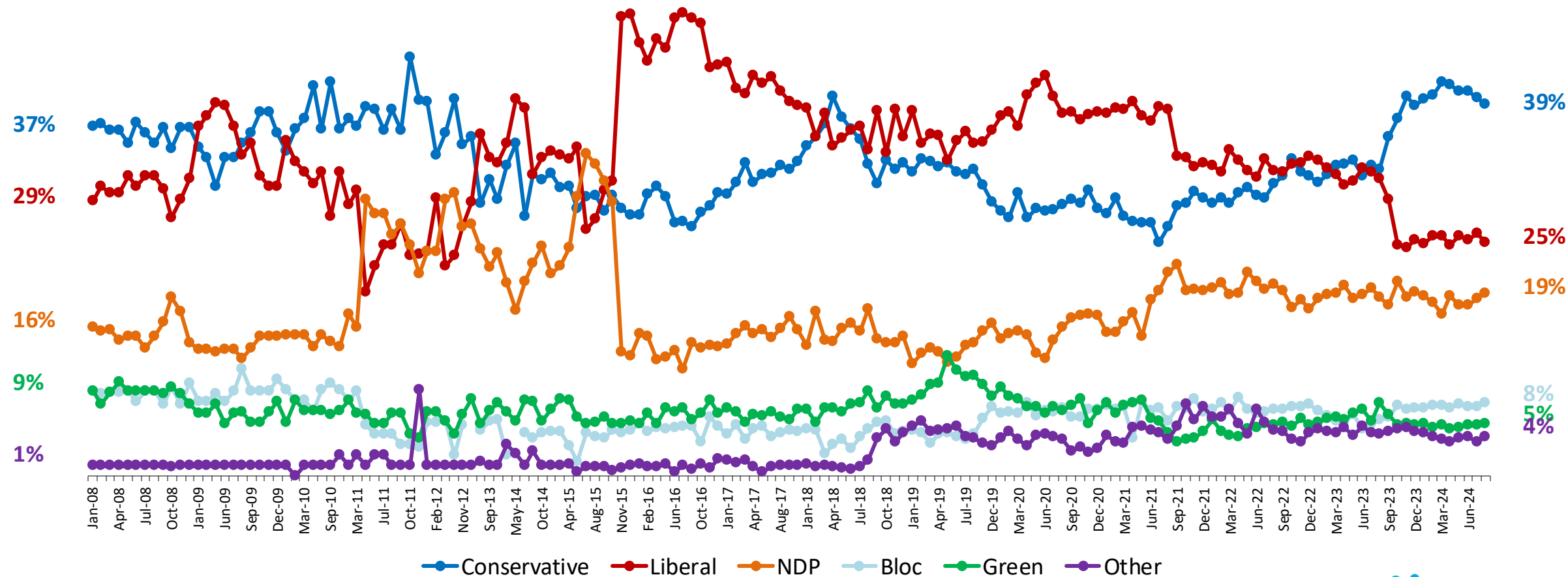
 National Time for Change  
[asked of all respondents, n=1,000]



# Federal Decided Vote Tracking:



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=2652]



# Combined Vote by Value Cluster:

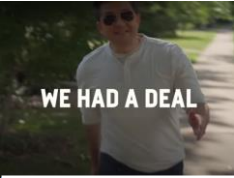



		Value Clusters					
		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
		(N=268)	(N=213)	(N=431)	(N=292)	(N=373)	(N=422)
Federal Combined Vote	Conservative	67%	39%	34%	28%	16%	34%
	Liberal	11%	25%	30%	21%	31%	18%
	NDP	4%	9%	13%	21%	28%	16%
	Bloc	3%	10%	8%	4%	5%	5%
	Green	3%	3%	4%	8%	6%	6%
	Other	4%	4%	3%	3%	3%	3%
	Undecided DK	7%	9%	8%	8%	7%	12%
Would not vote/None		2%	1%	2%	6%	4%	5%

**Note:** Current data: September 2024





# Poilievre 2023 vs Trudeau 2015 (English):

Conservative ads are comparable to the Liberals' best ads of 2015 on most measures

## 2023 Conservative Ads (English)

NET SCORES				
	CPC Ad 1 "We had a deal"	CPC Ad 2 "Putting the pieces back together"	CPC Ad 3 "Meet Pierre Poilievre"	CPC Ad 4 "You earned it"
	n=400	n=418	n=398	n=431
Impression	+49%	+46%	+48%	+42%
Credibility	+36%	+37%	+47%	+29%
Someone like me	+34%	+30%	+19%	+31%
Perceived Party Vote Impact	+16%	+15%	+15%	+17%
Hopeful (net)	+25%	+32%	+28%	+28%
Angry (net)	-10%	-17%	-13%	-9%
% who have seen/heard ad	19%	13%	28%	19%

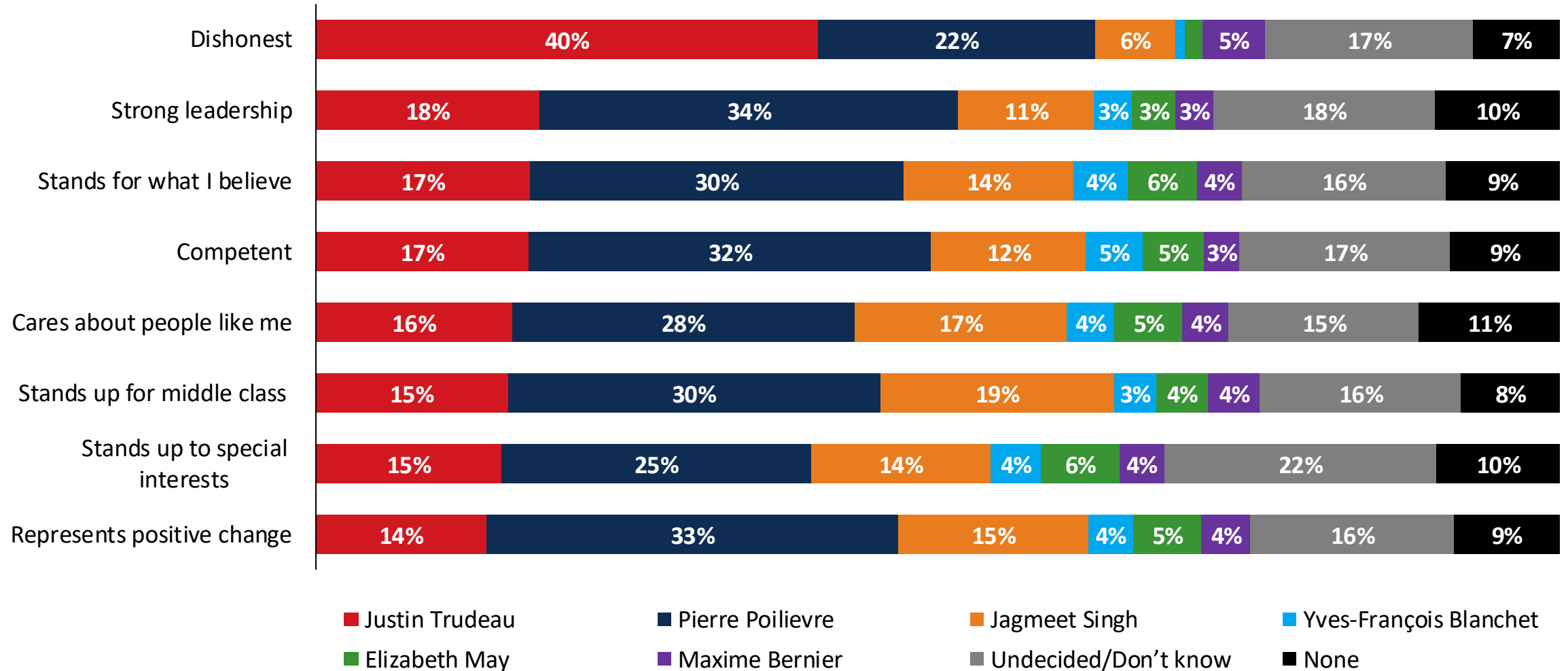
## 2015 Liberal Ads (English)

			
Liberal Ad 1 "Ready"	Liberal Ad 2 "Real Change Now!"	Liberal Ad 3 "Ready to lead"	Liberal Ad 4 "Harder to get ahead"
+53%	+47%	+44%	+38%
+45%	+36%	+40%	+36%
+34%	+28%	+28%	+18%
+29%	+22%	+20%	+10%
N/A	+32%	+29%	N/A
N/A	-1%	-4%	N/A
20%	37%	68%	20%

# Poilievre dominates all positive leader attributes



Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...  
[asked of all respondents; n=1,000]



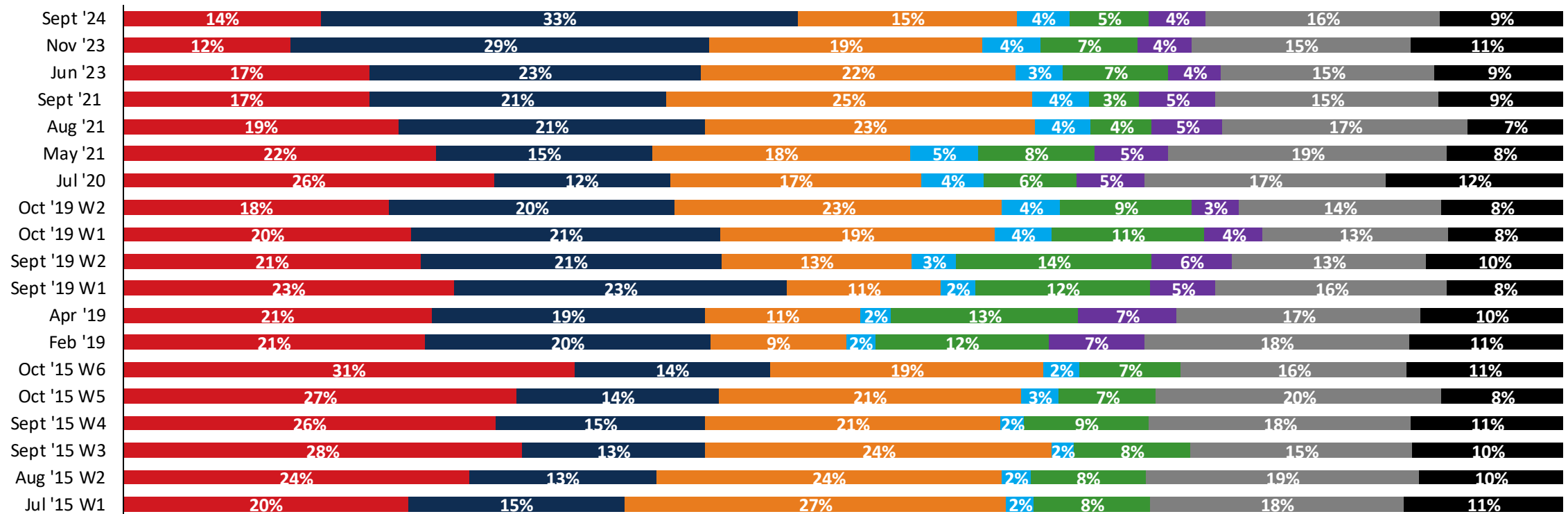
# Poilievre now dominates on represents positive change

Q

Now we are going to provide you with a list of different words or phrases that describe some political leaders. For each word or phrase, please indicate who it **best** describes...

## Represents positive change

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



■ Justin Trudeau

■ Pierre Poilievre

■ Jagmeet Singh

■ Yves-François Blanchet

■ Elizabeth May

■ Maxime Bernier

■ Undecided/Don't know

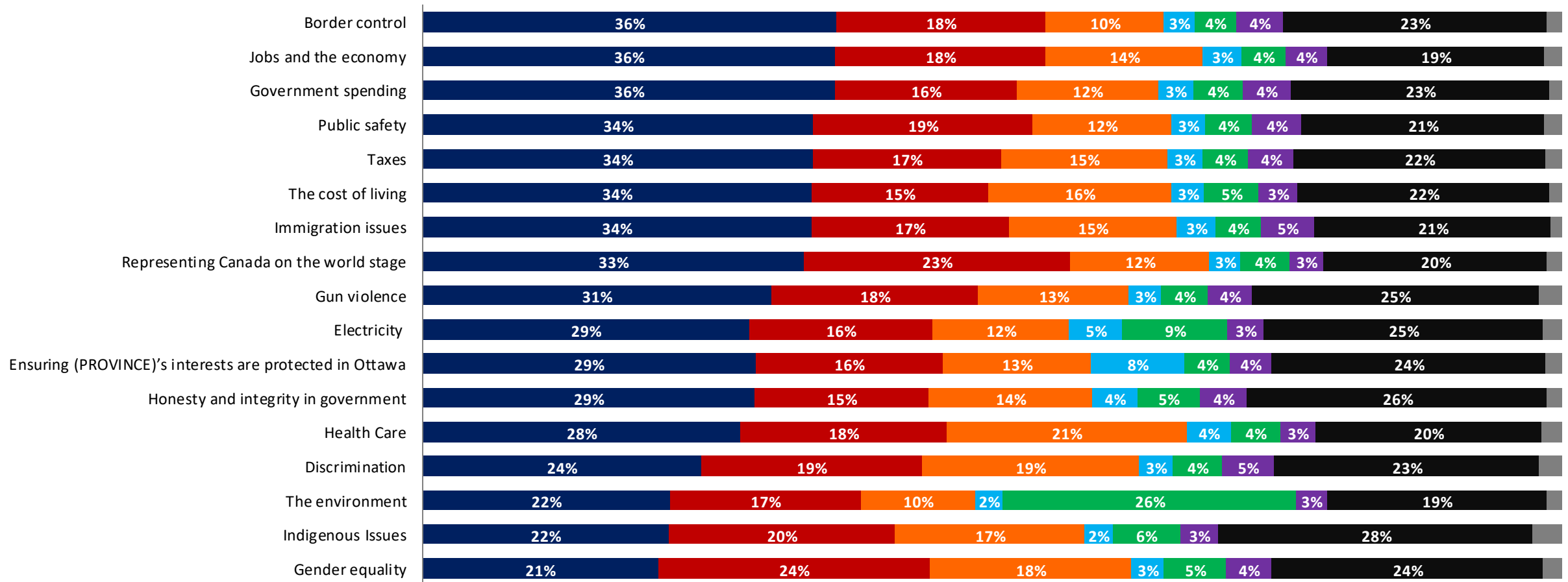
■ None

# Trudeau has dragged the Liberal Party down with him



Now we are going to provide you with a list of issues. For each of these issues, please tell me which party you think would do a better job, or if you think none of the parties would do a good job on that issue. How about .... ?

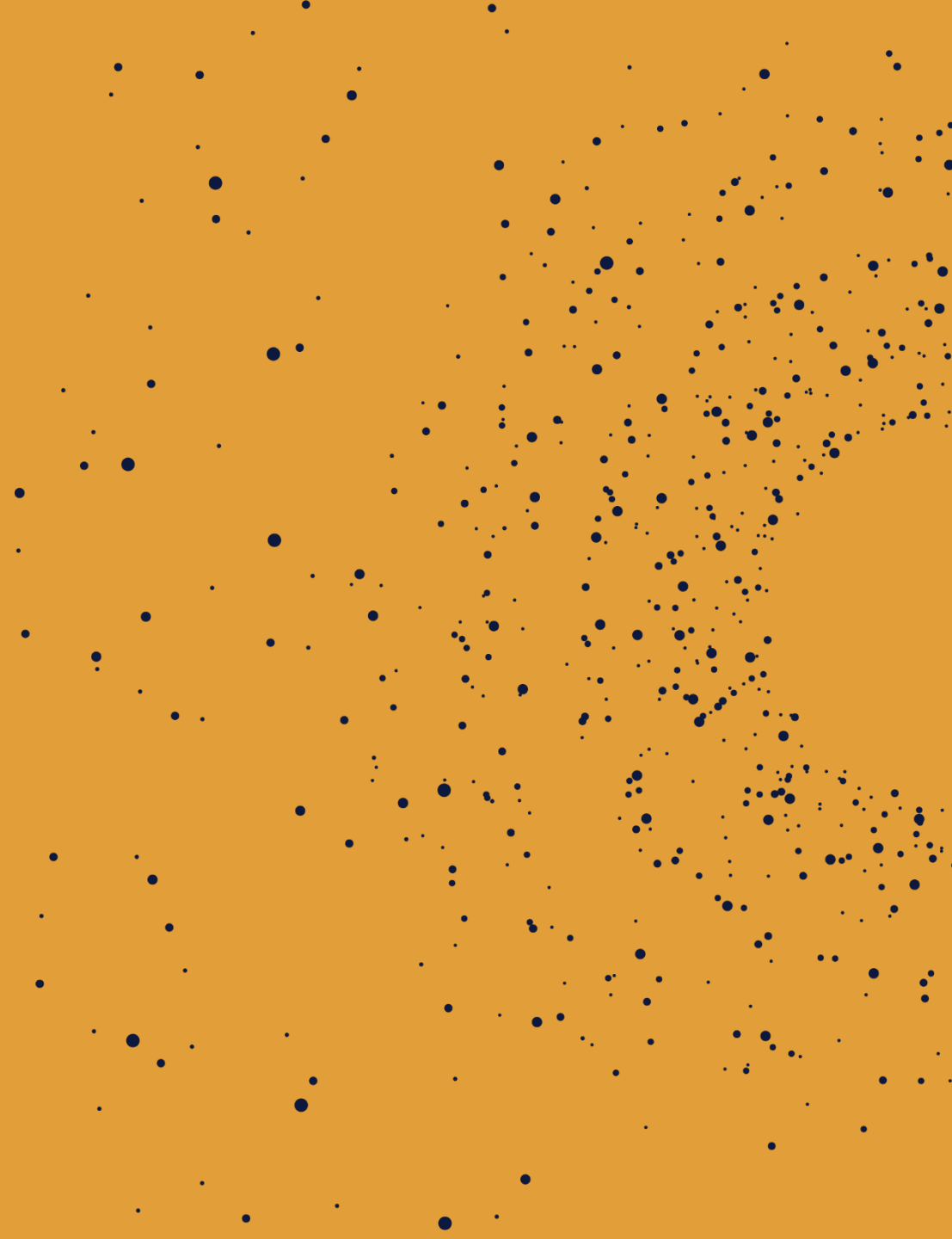
[asked of all respondents; n=1,000]



■ Conservative Party ■ Liberal Party ■ NDP ■ Bloc Quebecois ■ Green Party ■ People's Party ■ Maverick Party ■ None ■ Other party

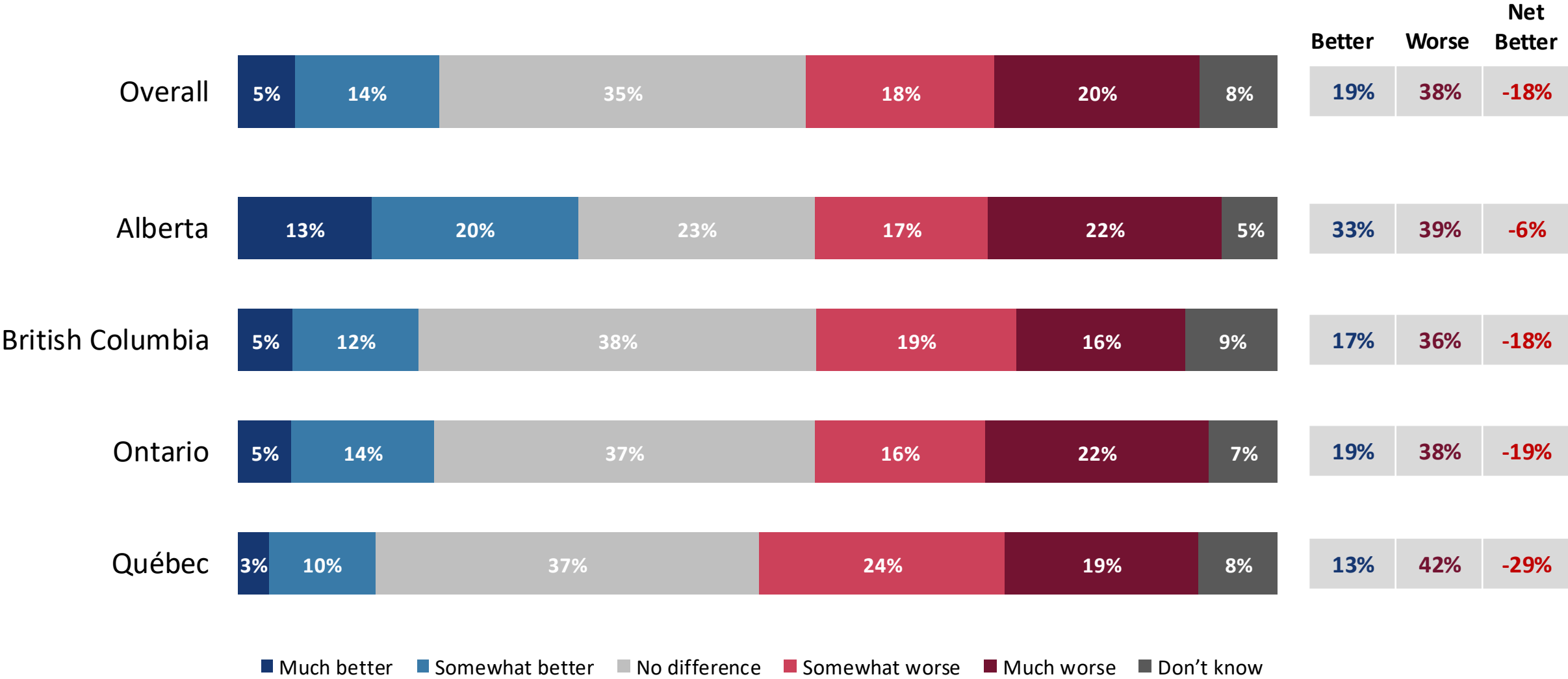
Note: Until Sept. '24 'Gender equality' wording was 'Women's equality'.

# Provincial Implications

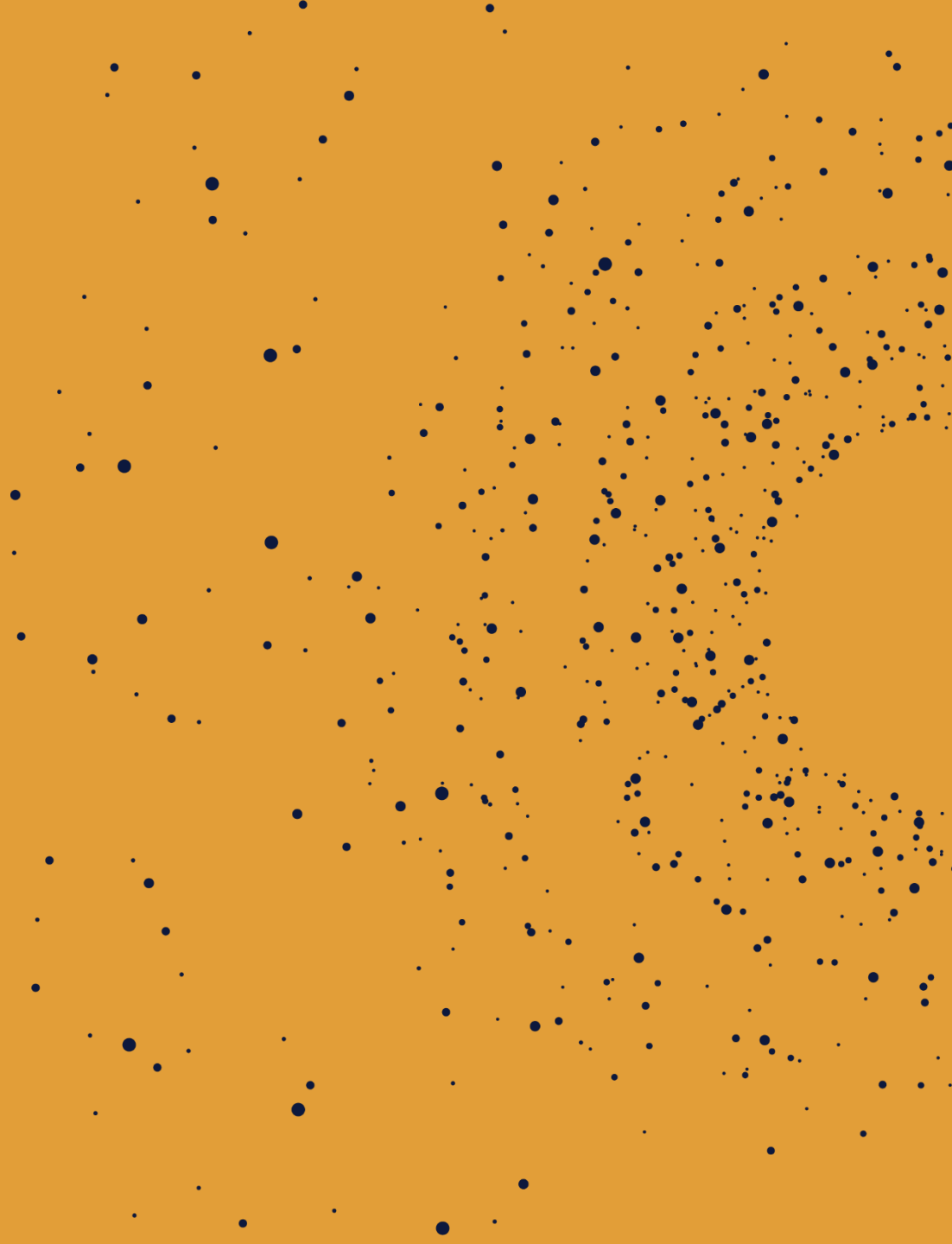


# Most Provincial Governments Seen to Make Things Worse, Not Better

Q Overall, do you think this provincial government is making things better or worse for people like you?  
[asked of all respondents; n=1,500]



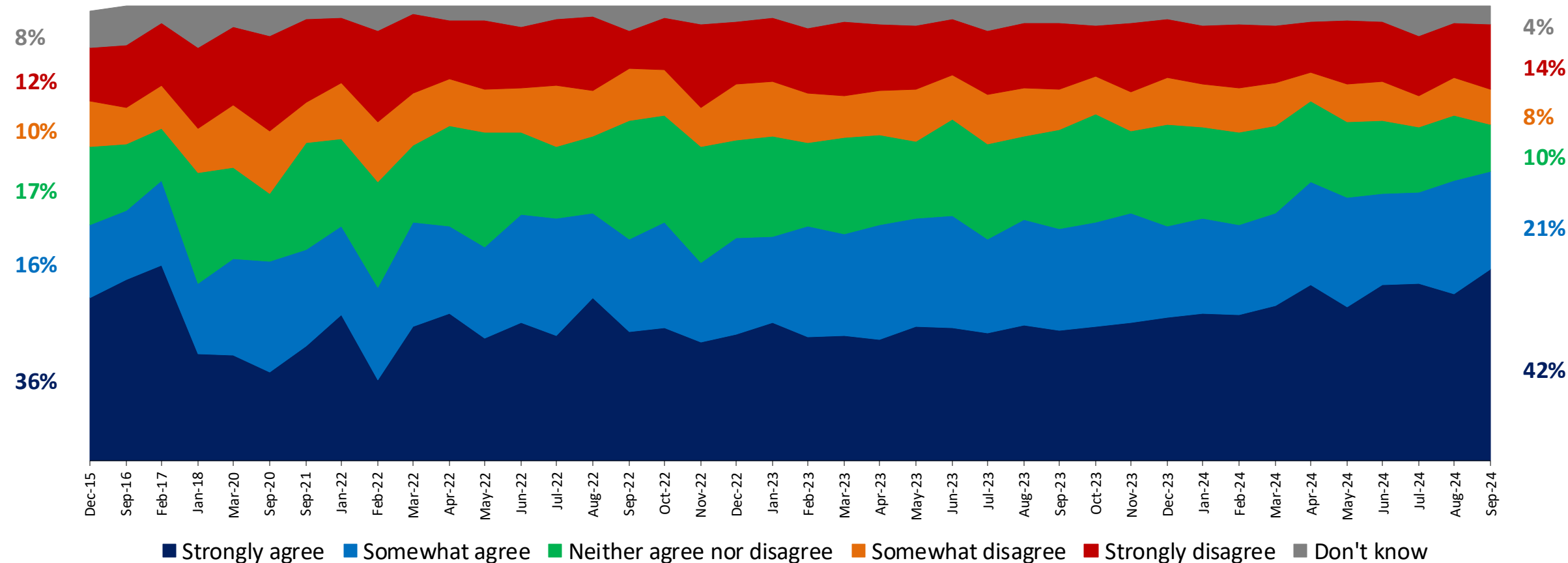
BC



# BC Time for Change Tracking: Those who strongly agree is up 5 pts from last month<sup>34</sup> last month



Do you agree or disagree with the following statements? - It is time for a change in government here in British Columbia  
[asked of all respondents; n=650]

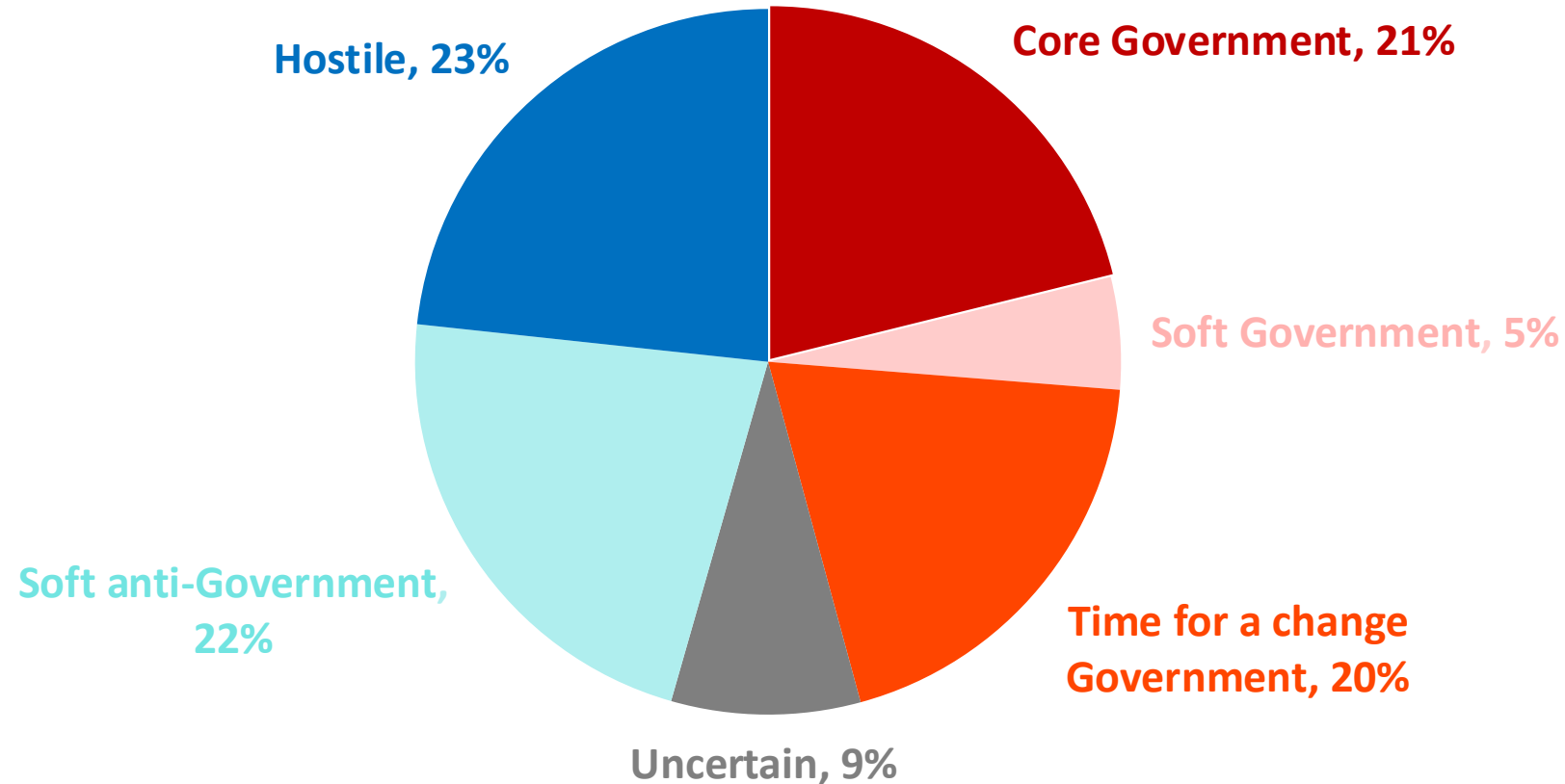


# Time for Change Segmentation: 1-in-5 (20%) of British Columbians are Time for Change, 23% are Hostile and another 22% are Soft anti-gov't <sup>35</sup>



Time for Change segmentation: Agree with 'The BC NDP 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 BC'.

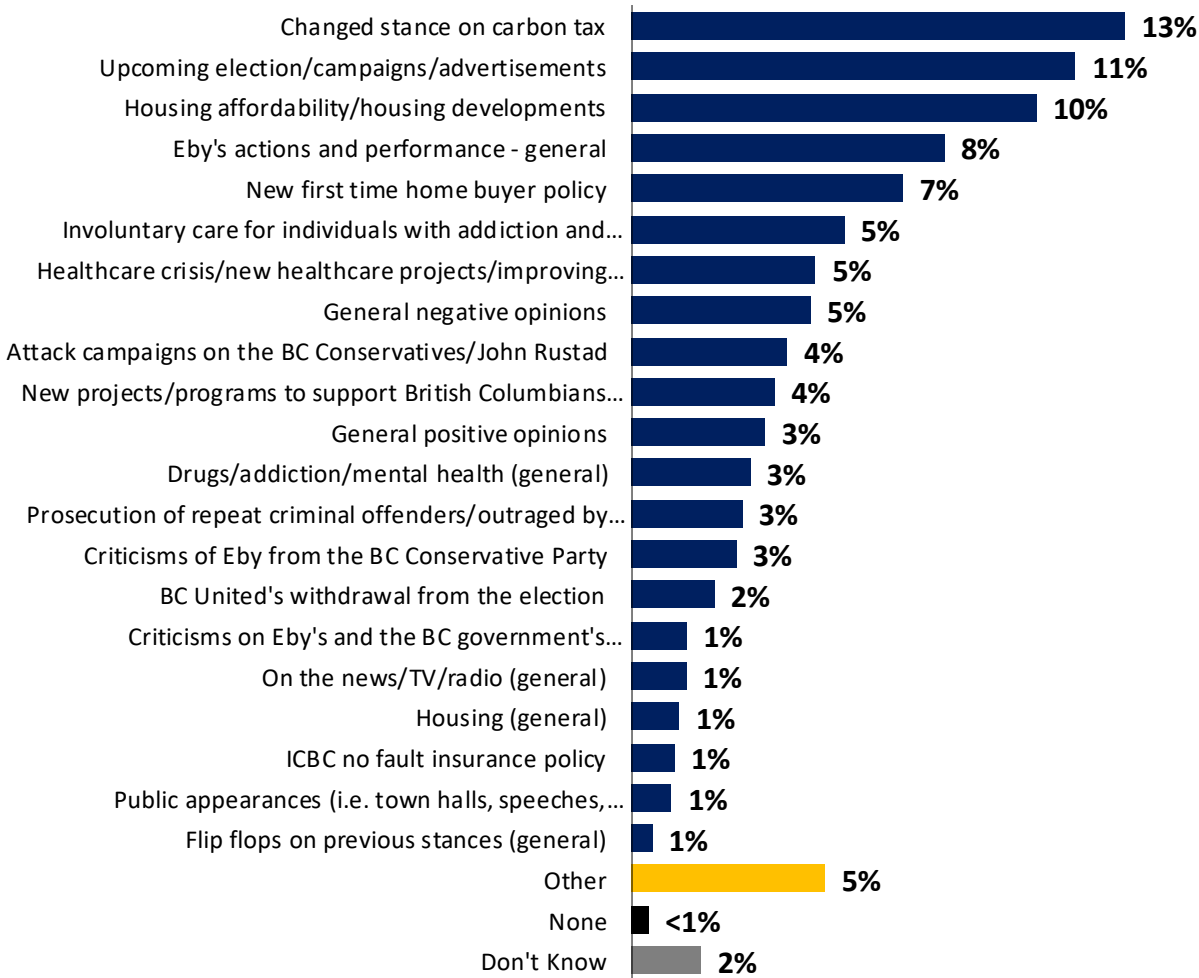
[asked of all respondents; n=650]



# BC Read, Seen, Heard: Eby's shift on the carbon tax is the top mention this month, having a negative impact at -10%

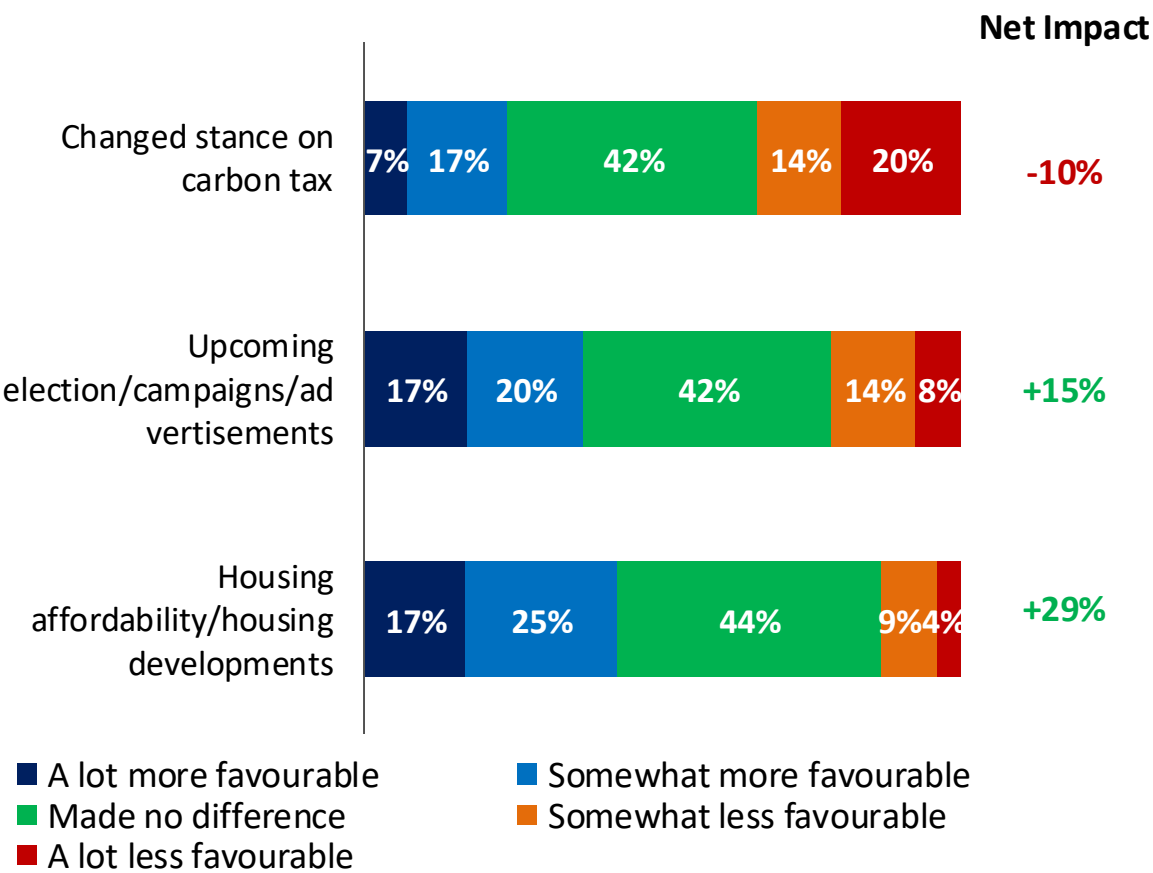
Q And what have you read, seen or heard about British Columbia's Premier David Eby and the provincial government in the last few days? Please be specific.

[asked of those who have RSH; n=226]



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 British Columbia's Premier David Eby and the provincial government, or did it make no difference? BY TOP 3 RSH ISSUES

[asked of those who have RSH; n=226]



NOTE: Refused (1%) not shown. A few of the responses have been shortened for brevity. \*This indicates a n-size equal to or less than 30. Please treat results with caution.

# Combined Vote by Week: BC Conservatives had the lead in the first two weeks, though the NDP rebounded in the last two weeks

Combined vote by Week

Combined Vote	Week	
	Weeks 1-2	Weeks 3-4
	(N=402)	(N=248)
	BC Conservative	42%
	NDP	33%
	Green	11%
	Other	2%
	Undecided/DK	8%
	Would not vote/None	4%
		10%
		4%

# Combined Vote BY Past Liberal Vote: 42% of those who voted for the BC Liberals 'less than half of the time' would vote for the Conservatives



If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**

BY In the past provincial elections in BC, how often did you vote for the BC Liberals?

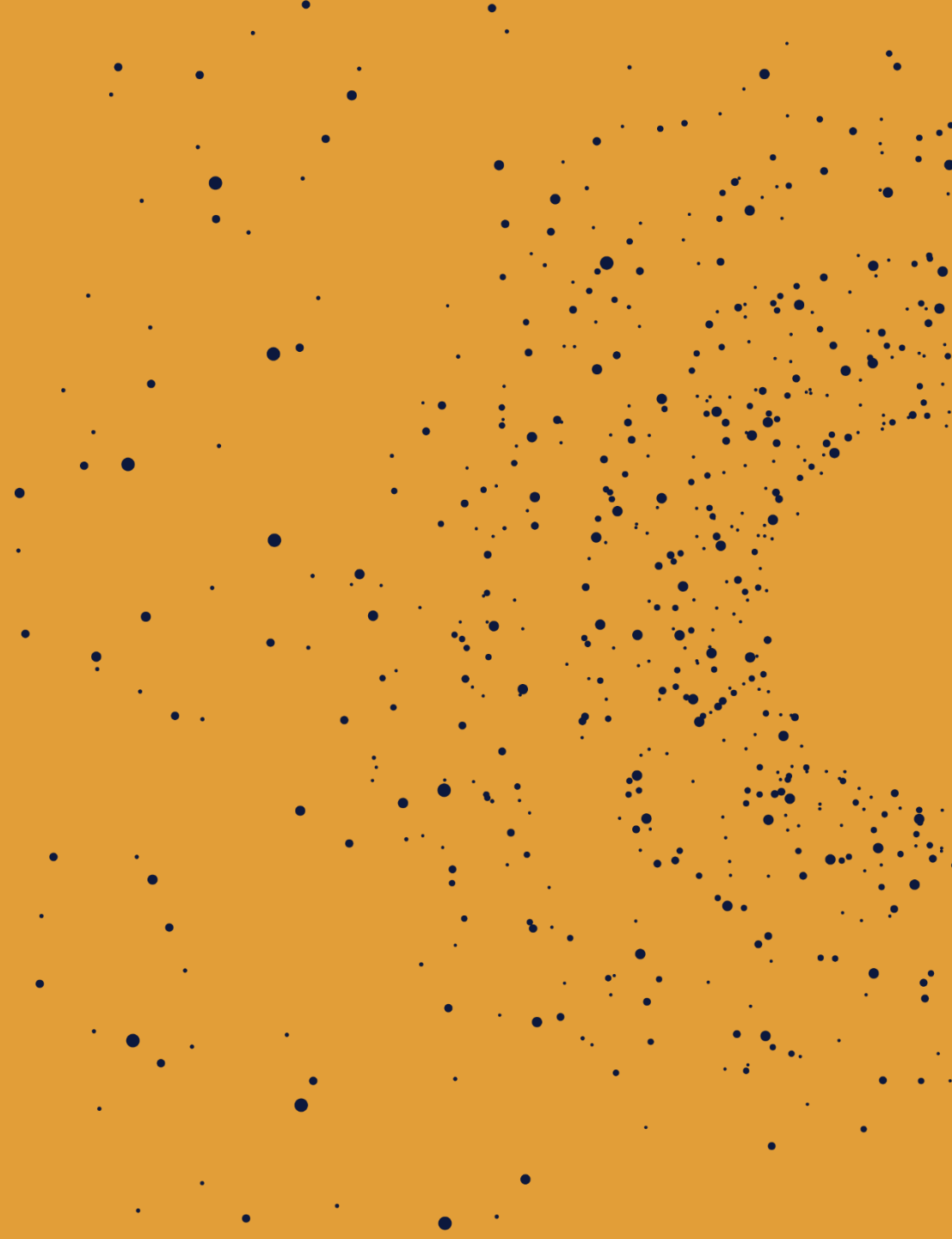
[asked of all respondents; n=650]

## Past Liberal Vote

Provincial Combined Vote

		Past Liberal Vote						
		All of the time	Most of the time	About half of the time	Less than half of the time	Never	I was not eligible to vote in a previous BC election	Don't know
		(N=96)	(N=91)	(N=72)	(N=72)	(N=240)	(N=48)	(N=31)
Provincial Combined Vote	BC Conservative	64%	50%	37%	42%	32%	20%	9%
	NDP	21%	24%	33%	45%	44%	40%	9%
	Green	10%	16%	18%	7%	11%	10%	13%
	Other	3%	3%	1%	0%	1%	4%	0%
	Undecided/DK	3%	7%	6%	6%	5%	19%	56%
	Would not vote/None	0%	0%	4%	0%	6%	7%	14%

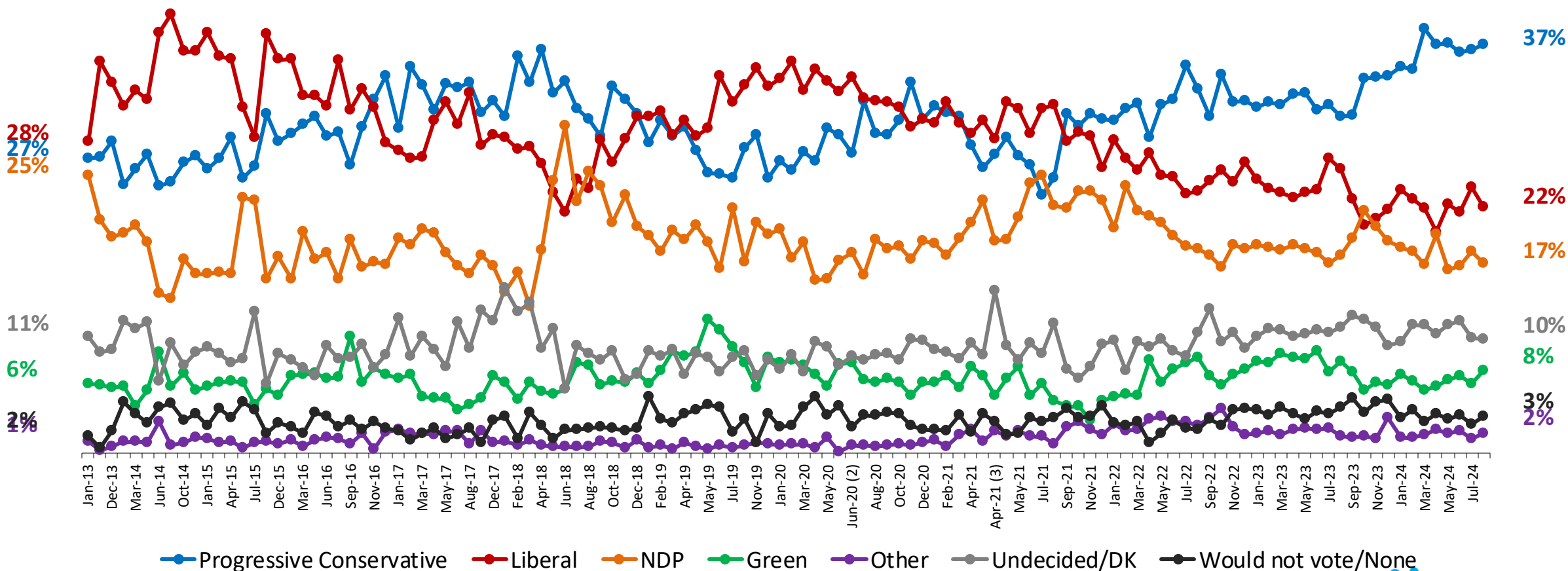
**Ontario**



# Ontario Vote Tracking:



If a provincial election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[Vote + Lean]**  
[asked of all respondents; n=2000]

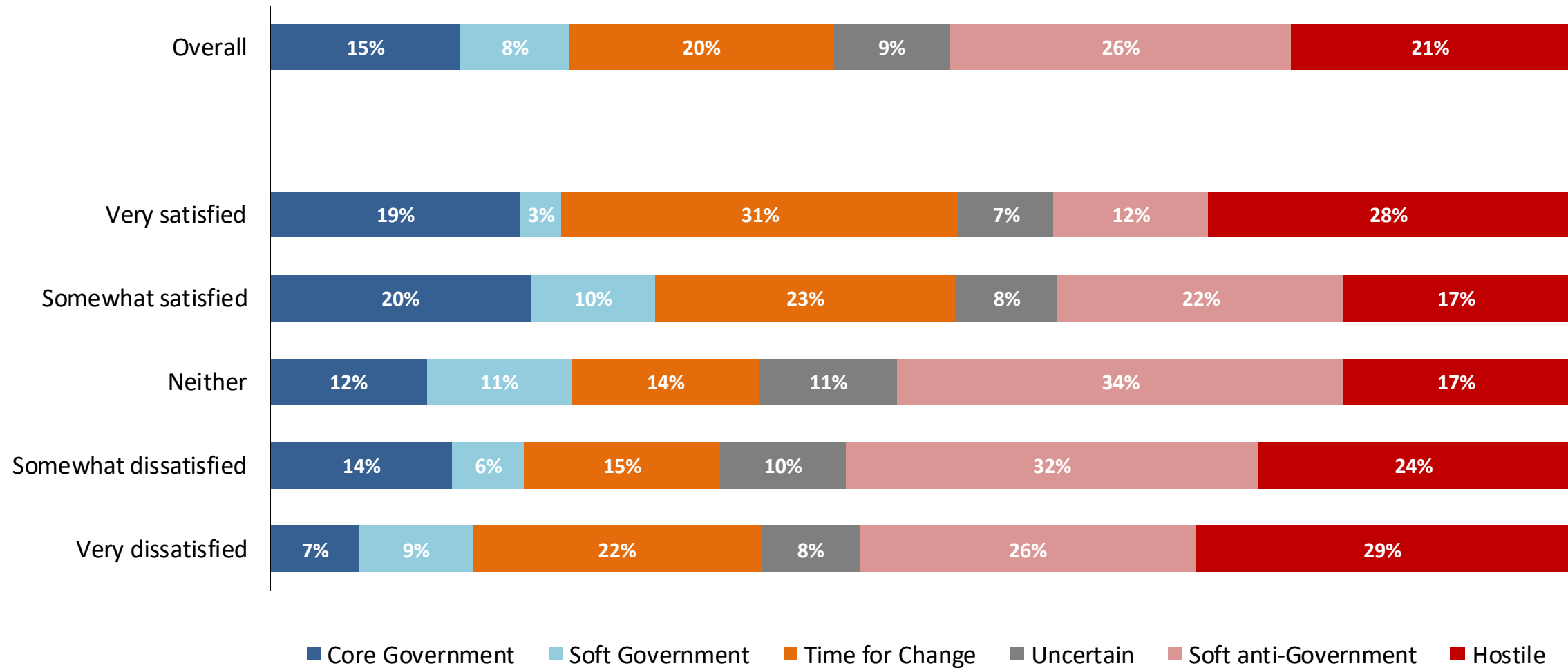


# Satisfaction with Standard of Living by Provincial Time for Change:

Weaker connection than federal, but more satisfied still more likely to support the government



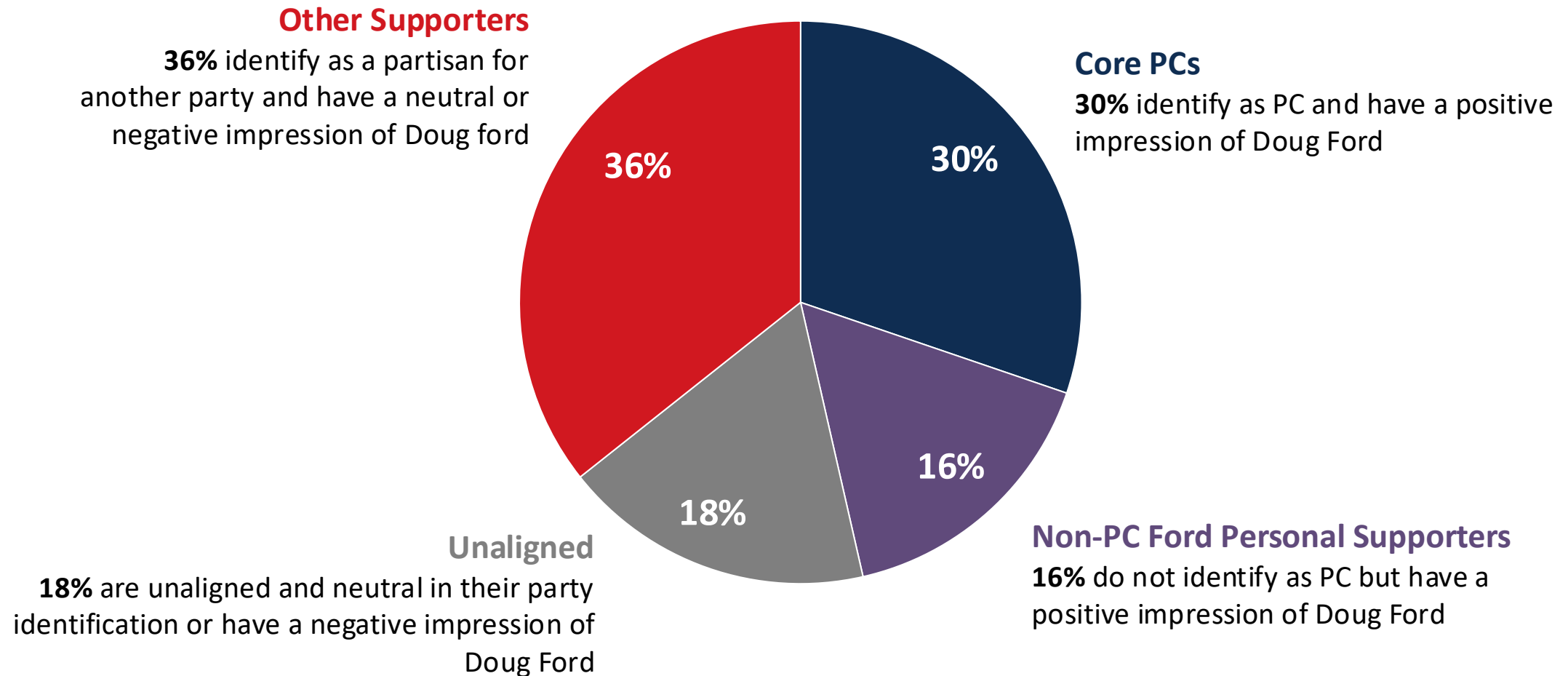
Provincial Time for Change  
[asked of all respondents in Ontario, n=1,000]



# Doug Ford Personal Vote Segmentation:

1-in-3 are Core PCs, while 36% support other parties

Q Respondents are grouped based on their party identification and impression of Doug Ford  
[asked of all respondents in Ontario, n=1,000]

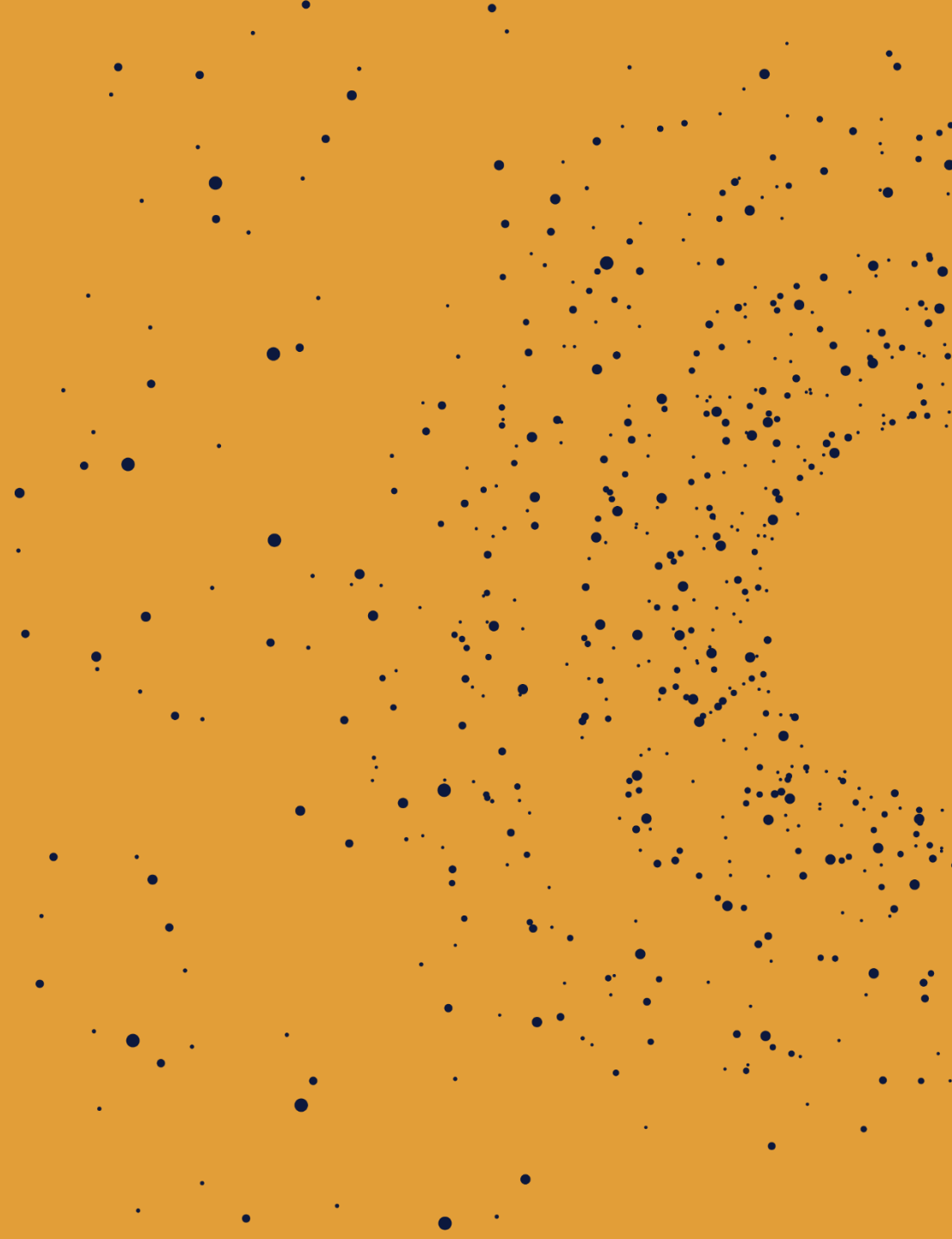


# Combined Vote by Doug Ford Personal Vote Segmentation:

1-in-3 of Non-PC Ford Personal Supporters are Liberal voters

	Core PCs	Non-PC Ford Personal Supporters	Unaligned	Other Supporters
Liberal	3%	32%	7%	38%
Progressive Conservative	86%	44%	9%	5%
NDP	4%	12%	12%	35%
Green	2%	8%	8%	13%
Other	1%	1%	7%	1%
Undecided/Don't know	2%	4%	38%	8%
Would not vote/None	1%	0%	19%	<1%

# Canadian and US Views on Environment and Energy Transition

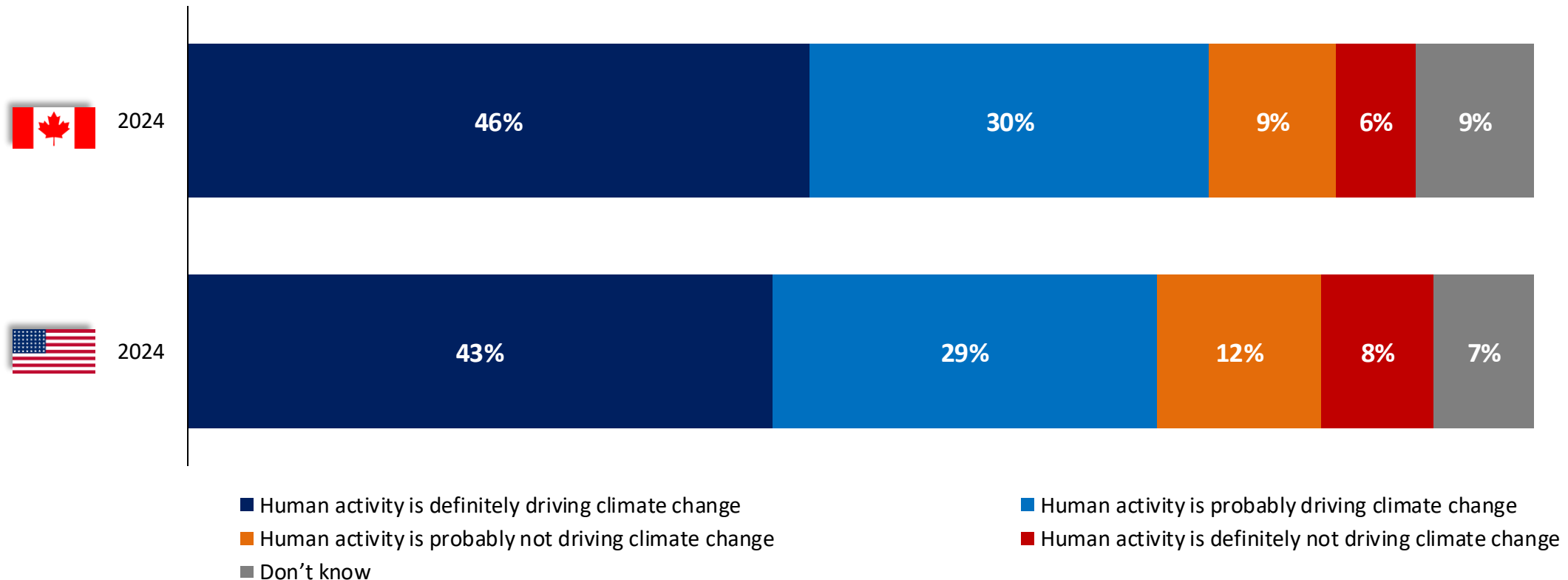


# Climate Change: Both Canadians (76%) and Americans (72%) believe that human activity is the cause of climate change

Q

Thinking about your own personal view, do you believe that...

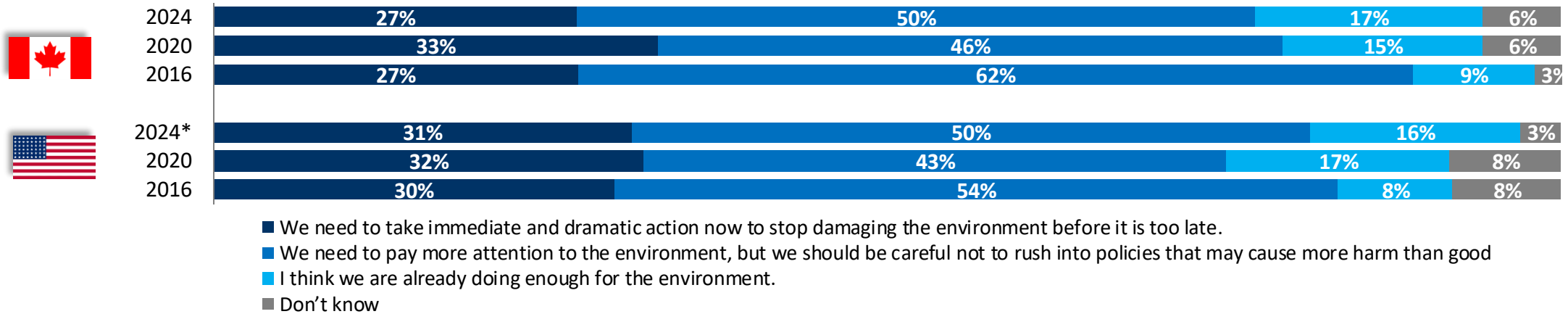
[asked of all respondents; Canada n=1,500, United States n=2,000]



# Environment: In 2024, both Canadians and Americans prioritize the economy over the environment; a 9-point rise since 2016 among Americans

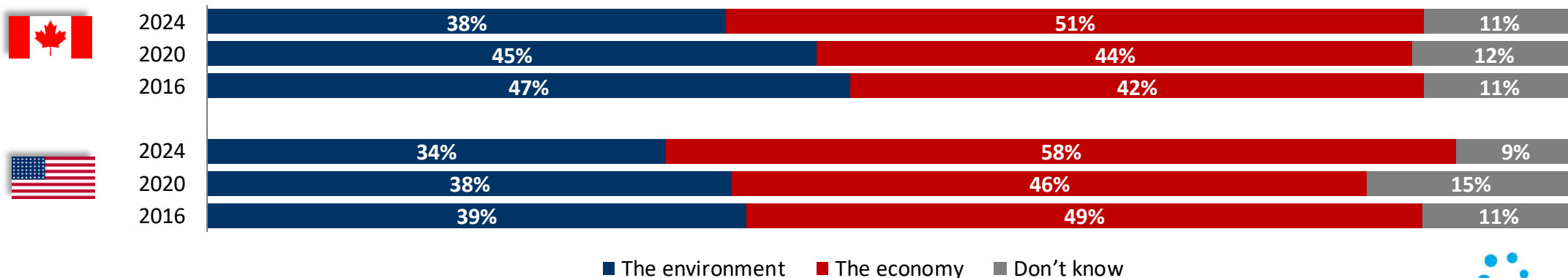
Q Which of the following statements best describes your personal point of view?

[asked of all respondents; Canada n=1,500, United States n=2,000]



Q When it comes to trade-offs between the environment and the economy, which is more important to you?

[asked of all respondents; Canada n=1,500, United States n=2,000]



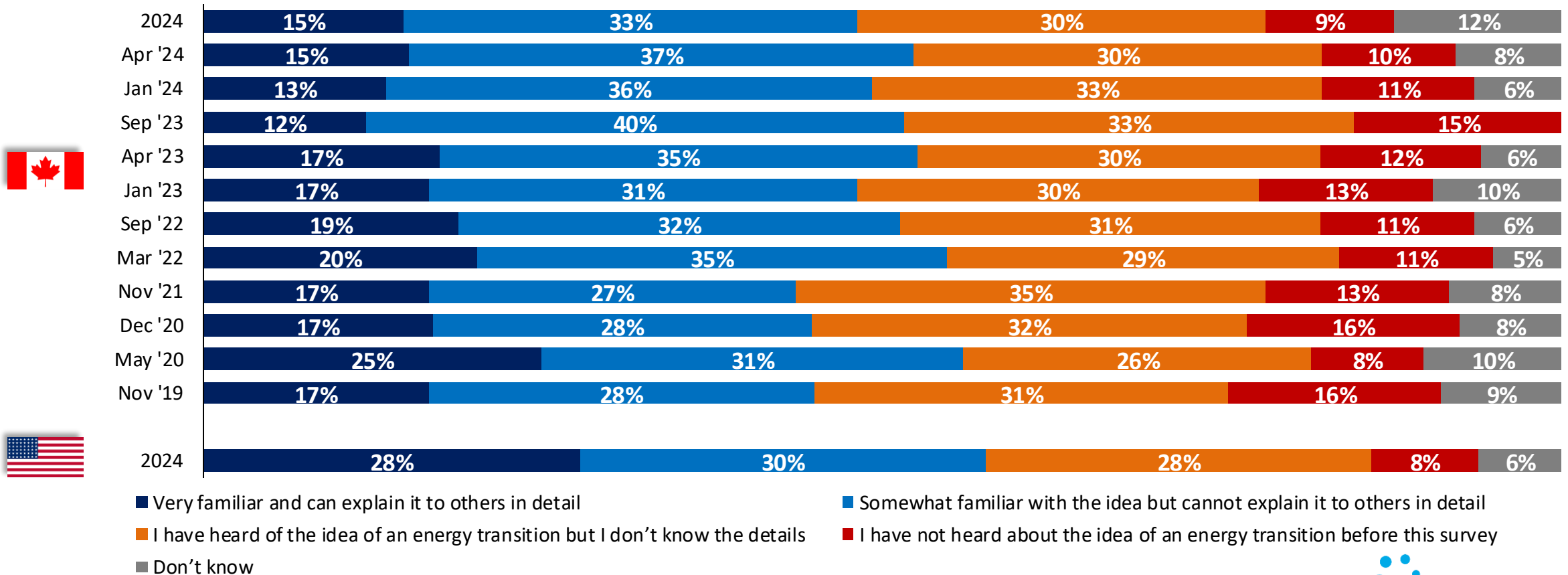
# Energy Transition Familiarity: in 2024, more Americans (58%) are familiar with the energy system transition idea than Canadians (48%)



One issue people have been talking about lately is the idea that [COUNTRY] and the world may be transitioning from its current energy system that depends highly on carbon-based fossil fuels like coal, oil and gas to a lower-carbon energy system.

How familiar are you with the idea of transitioning from its current energy system that depends highly on carbon-based fuels to a lower-carbon energy system?

[asked of all respondents; Canada n=1,500, United States n=2,000]



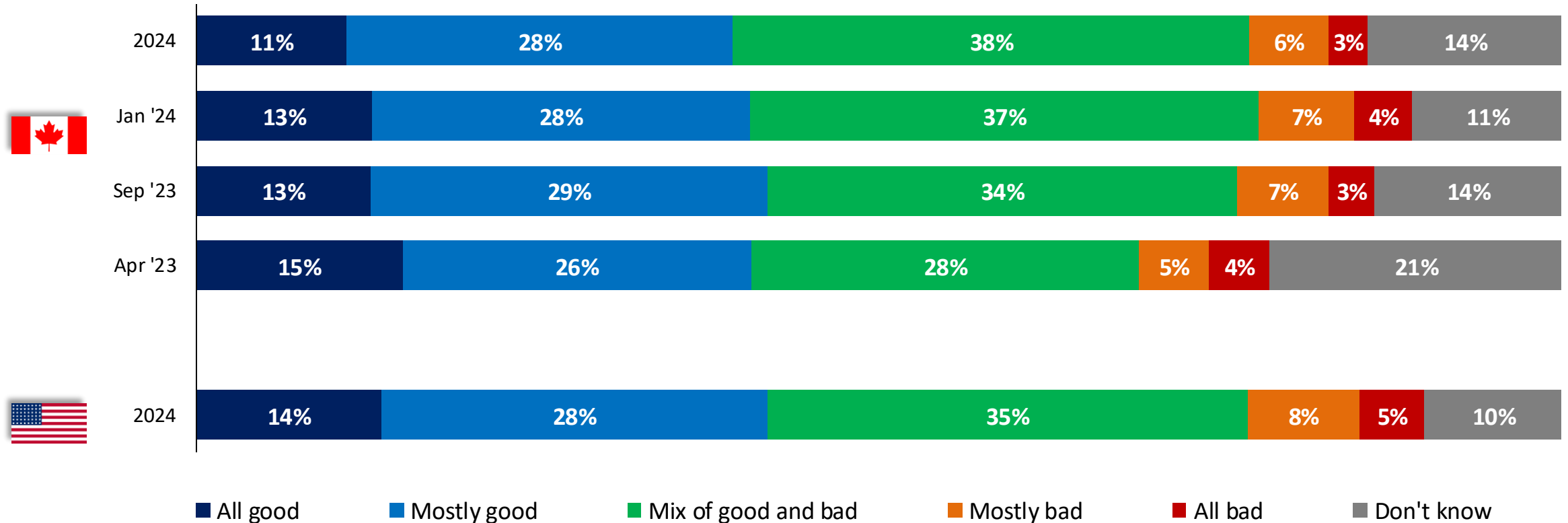
**NOTE:** "Don't know" was not included as an option when asked in September 2023. In addition, wording for two response options are slightly different from November 2019 to April 2023 i.e. "Very familiar and can explain it to others in detail" was "I understand the details and can explain them to others" while "Somewhat familiar with the idea but cannot explain it to others" was "I am familiar with the idea of an energy transition but cannot explain it to others".

# Energy Transition Impression: Compared to Canadians (39%), slightly more Americans (42%) say energy transition sounds like a good thing



From what you know or based on your first impression, does energy transition sound like a good thing or a bad thing?

[asked of all respondents; Canada n=1,500, United States n=2,000]



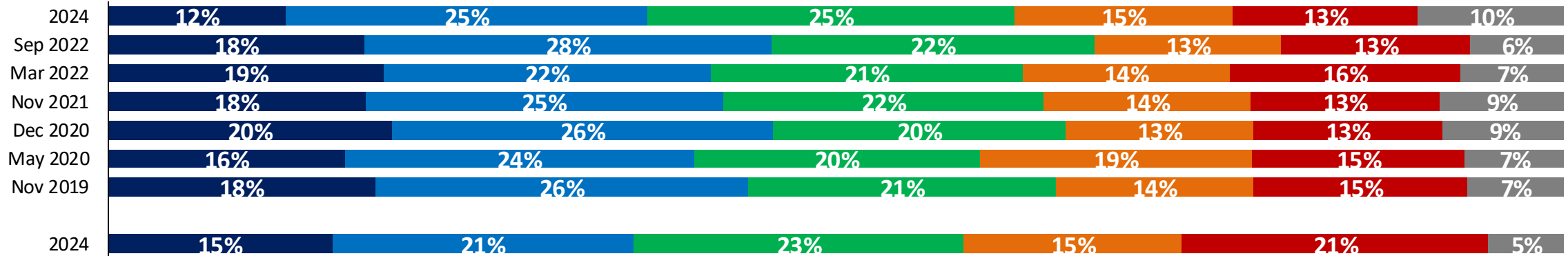
# Pro-Energy Transition: More Americans than Canadians agree that the world is facing a climate emergency



Do you agree or disagree with the following statements?

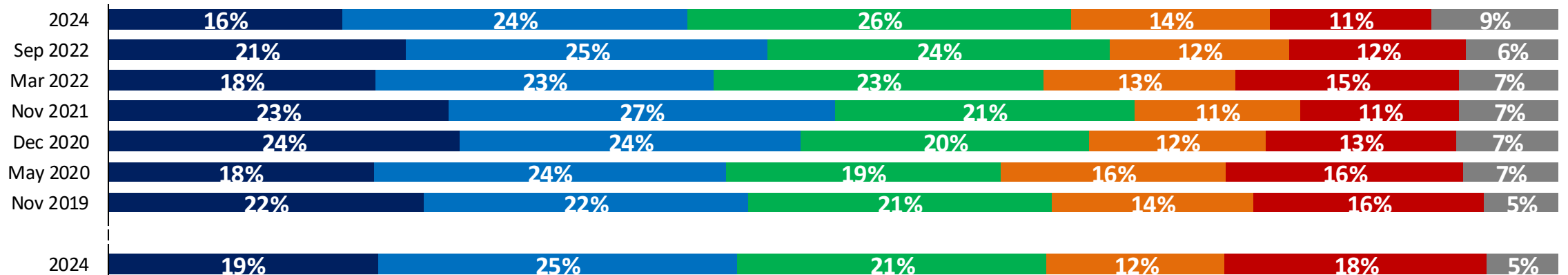
[asked of all respondents; Canada n=1,500, United States n=2,000]

**Fossil fuels should be phased out as quickly as possible to speed up the shift to a lower-carbon future even if it means job losses or paying more for energy.**



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

**The world is facing a climate emergency and it is irresponsible of [COUNTRY] to add to the problem by developing new oil and gas projects.**



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

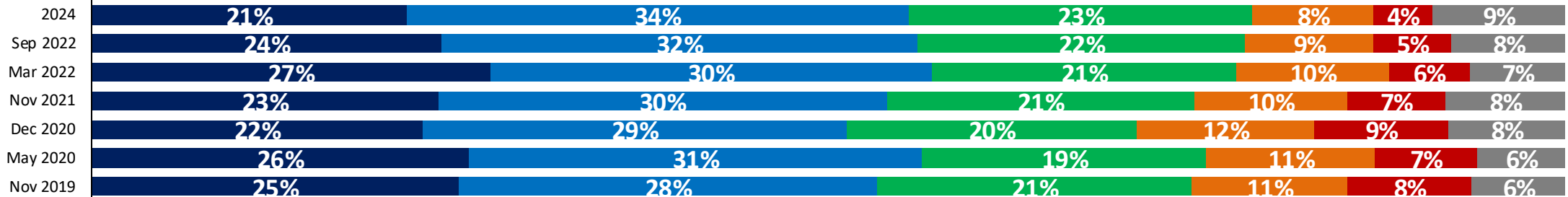
# Pro-Oil: More than half of Canadians and Americans agree that its critical for their country to responsibly develop and export oil/gas resources



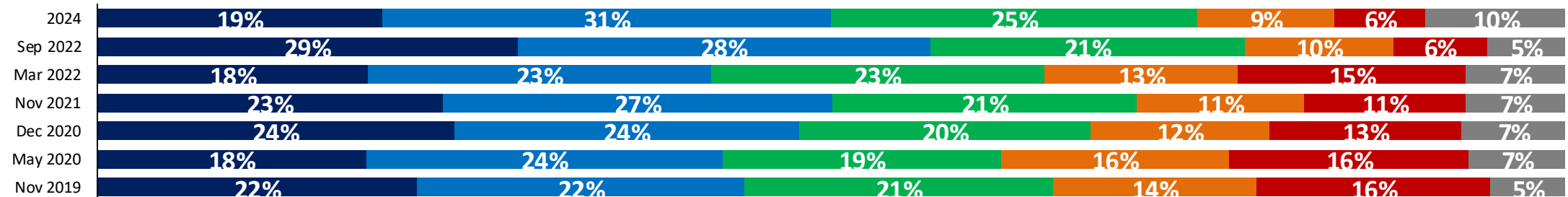
Do you agree or disagree with the following statements?

[asked of all respondents; Canada n=1,500, United States n=2,000]

*It is critical to [COUNTRY]'s' ongoing prosperity that we responsibly develop and export our oil and gas resources.*



*It makes no sense to leave [COUNTRY]'s oil and gas in the ground because if [COUNTRY] doesn't meet the global demand, another country will.*



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

# Climate Change Belief: Increasing numbers of Canadians feel that forest fires are proof of climate change<sup>51</sup>

**Q** Do you agree or disagree with the following statement: **The fire in [Jasper, 2024 or Fort McMurray 2016] is proof that climate change is happening**

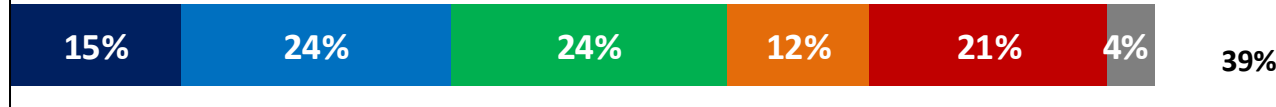
[asked of all respondents; n=1,000 in Canada and n= 300 in Alberta]

## Canada

Jasper 2024



Fort McMurray 2016



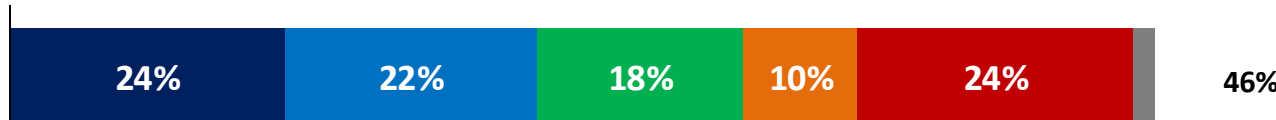
Overall Agree

57%

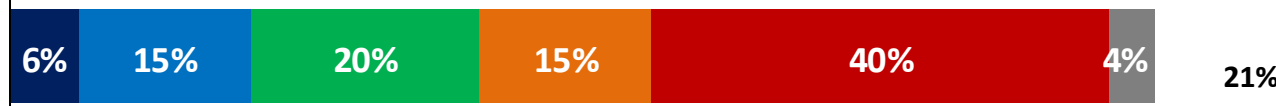
39%

## Alberta

Jasper 2024



Fort McMurray 2016



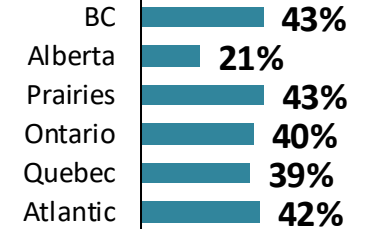
■ Strongly agree  
■ Somewhat agree  
■ Neither agree nor disagree  
■ Somewhat disagree  
■ Strongly disagree  
■ Don't know

## National Segmentation

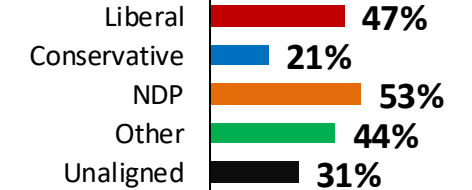
*Those who say 'Agree'*

2016

### Region

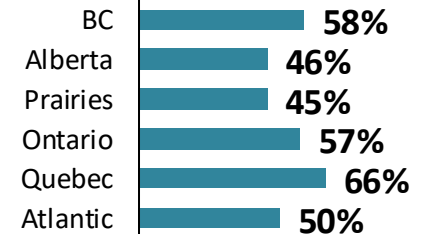


### Party ID



2024

### Region



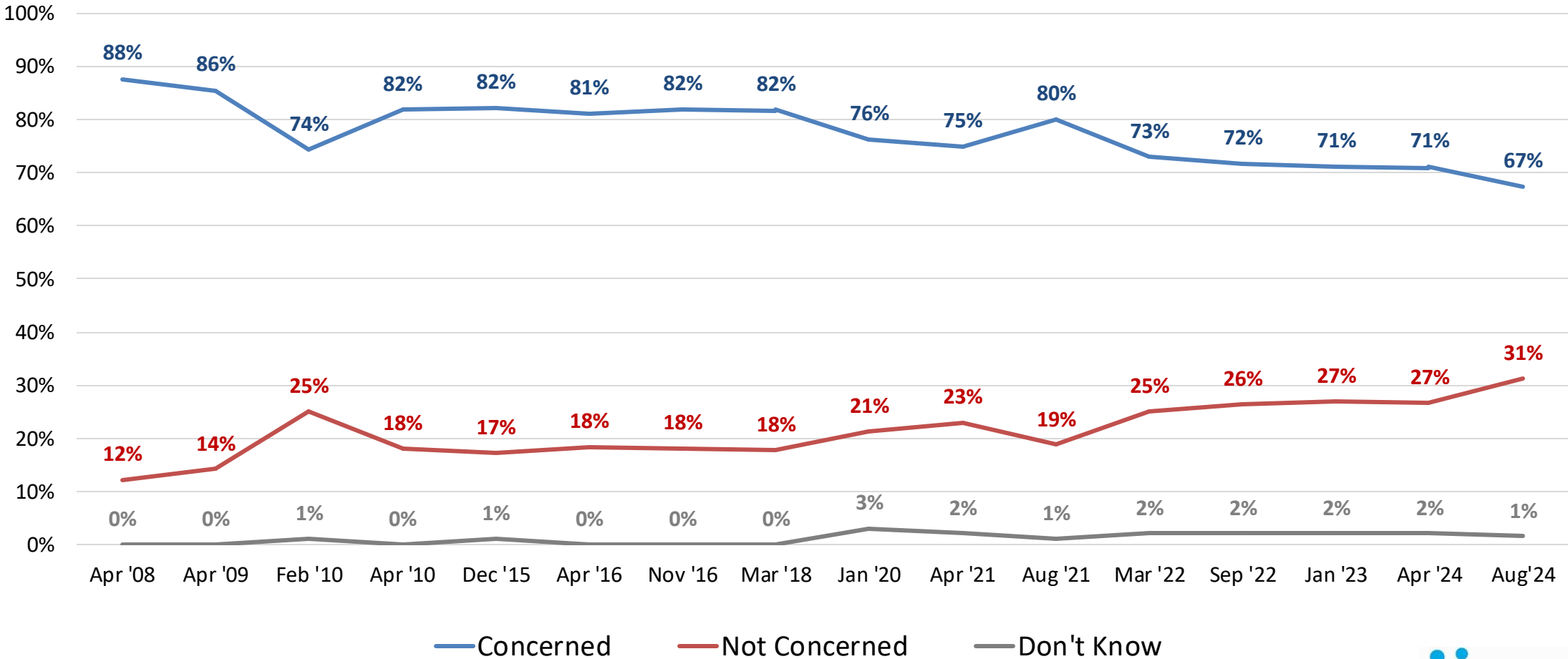
### Party ID



# Concern over Climate Change Tracking: Concern for climate change is at its lowest level, 67%, since tracking began in April 2008



How concerned are you about climate change?  
[asked of all respondents; n=1,000]



**NOTE:** Prior to 2010, the term “global warming” was used in place of “climate change”  
Prior to 2024, results only show those who believe climate change is occurring. Extremely concerned’ was recently added in March 2022.

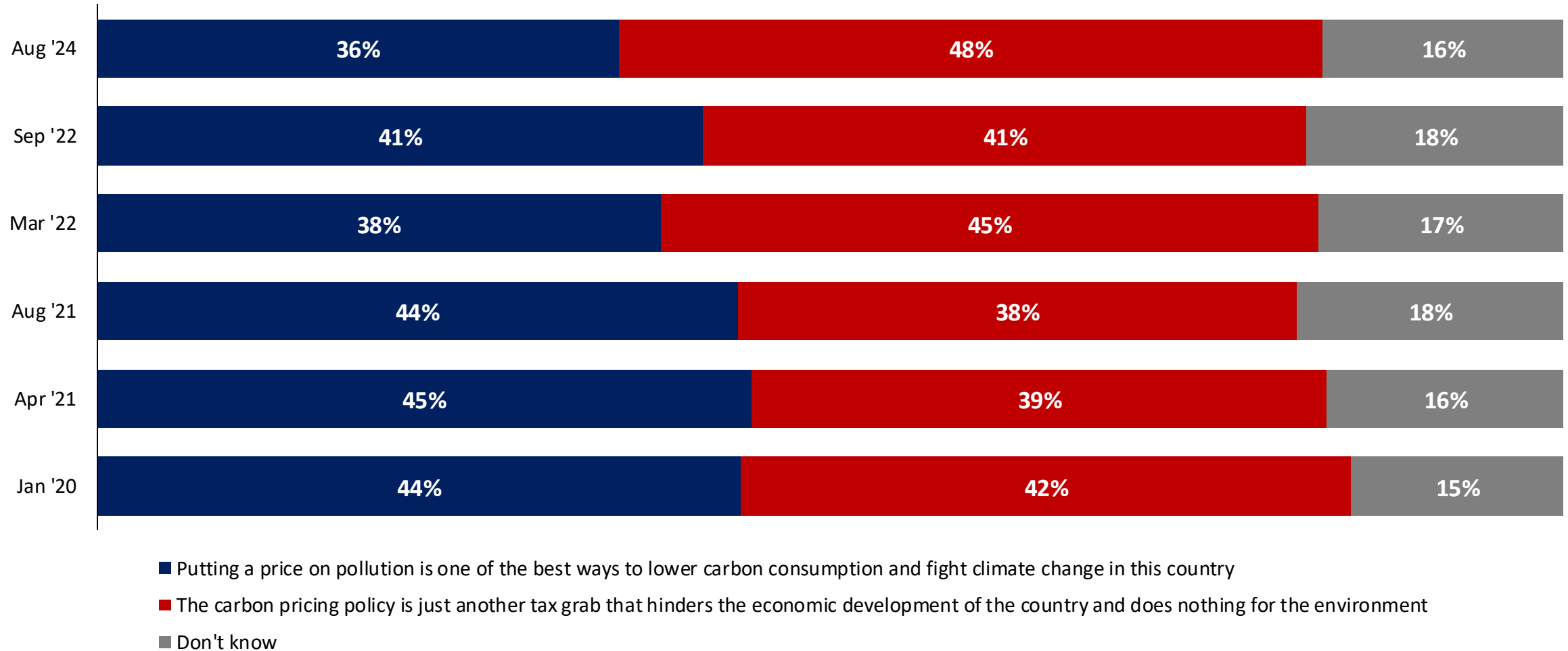


# Opinions on carbon tax tracking: Nearly half of Canadians (48%) view carbon pricing as a tax grab; highest level since tracking began



Based on what you know about the federal government's carbon pricing policy, which of the following statements is closest to your point of view?

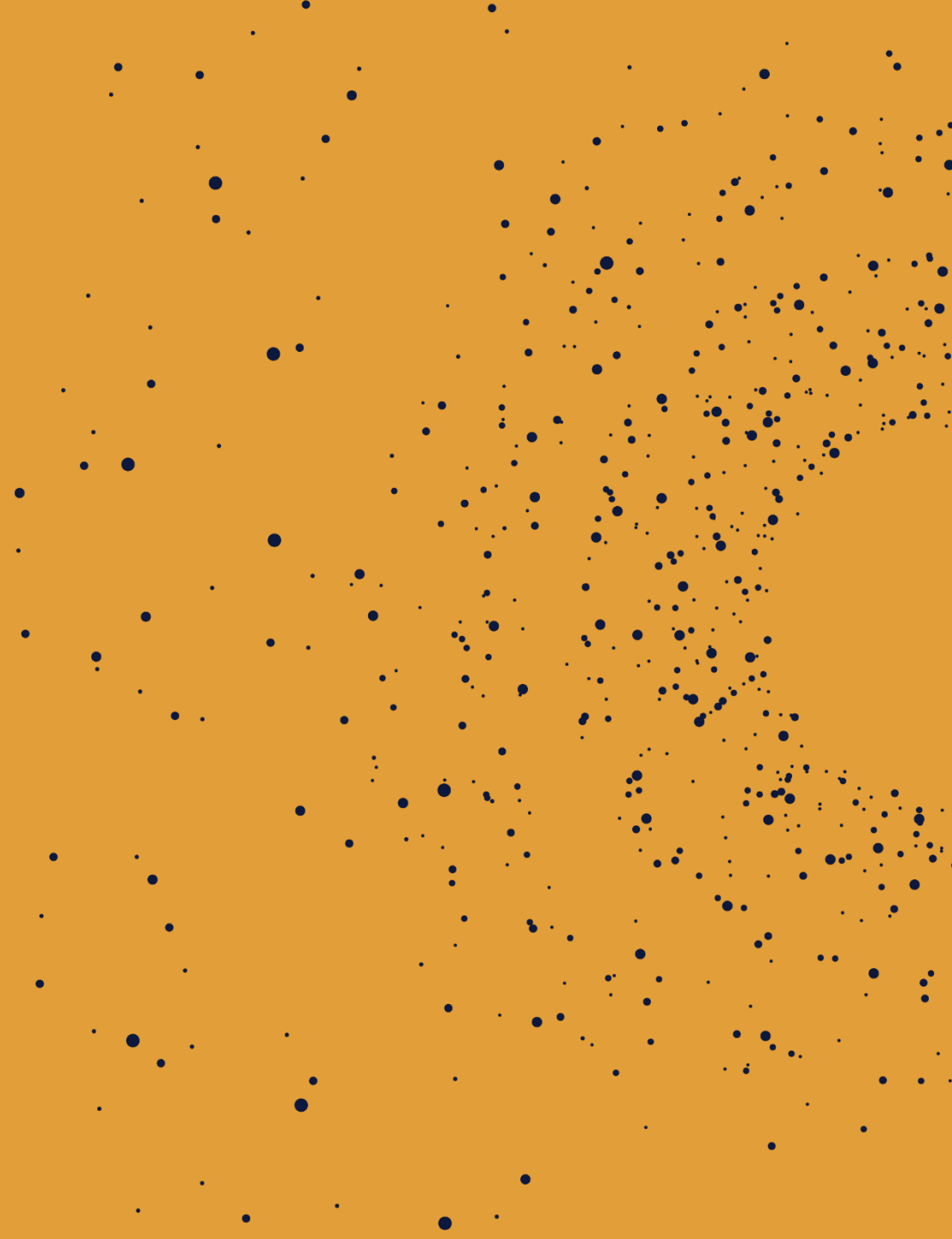
[asked of all respondents; n=1,000]





Q&A

# Health



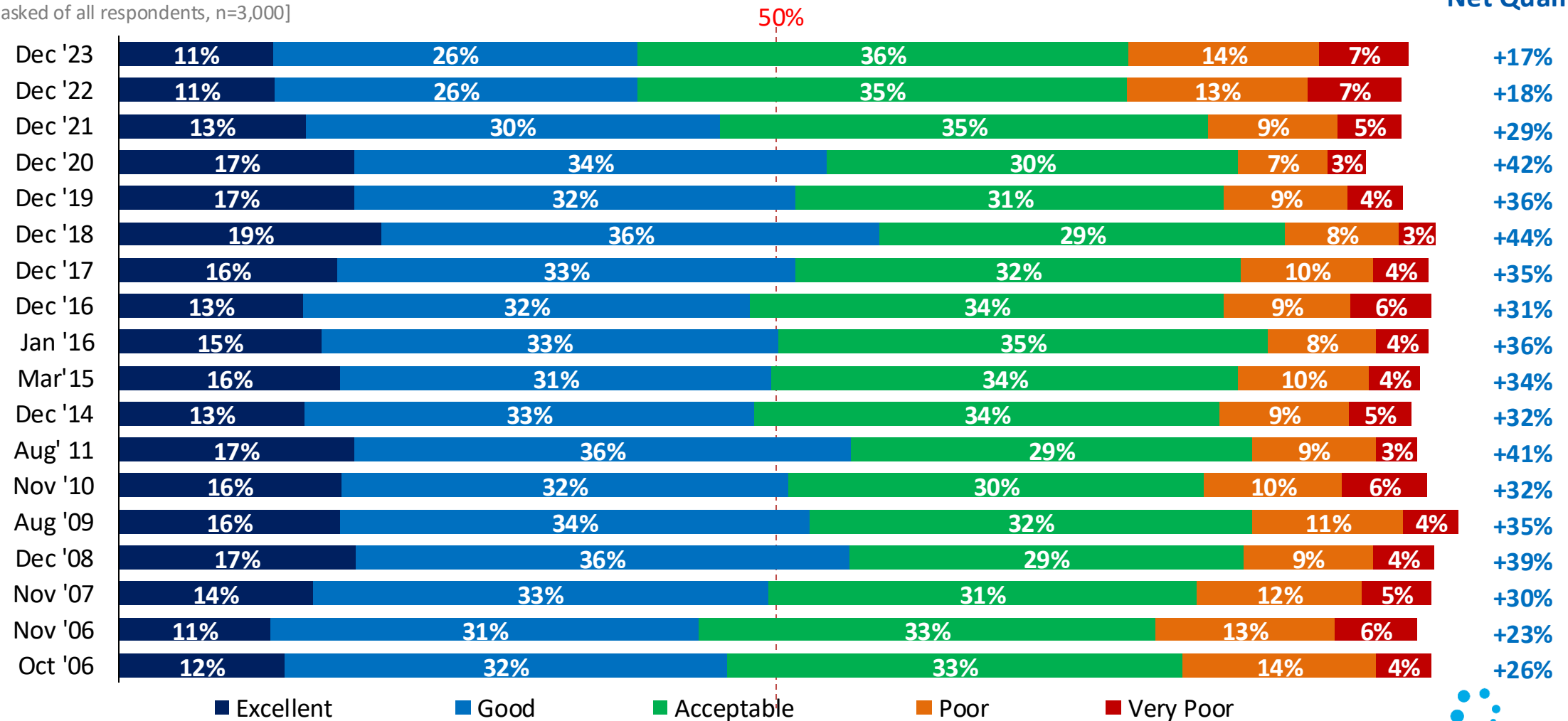
# Quality of Services: Perceived quality of care is steady with 2022, falling 25 points since December 2020

Q

Generally speaking, how would you describe the *quality* of the health care services provided to you and your family in the last 12 months?

[asked of all respondents, n=3,000]

Net Quality



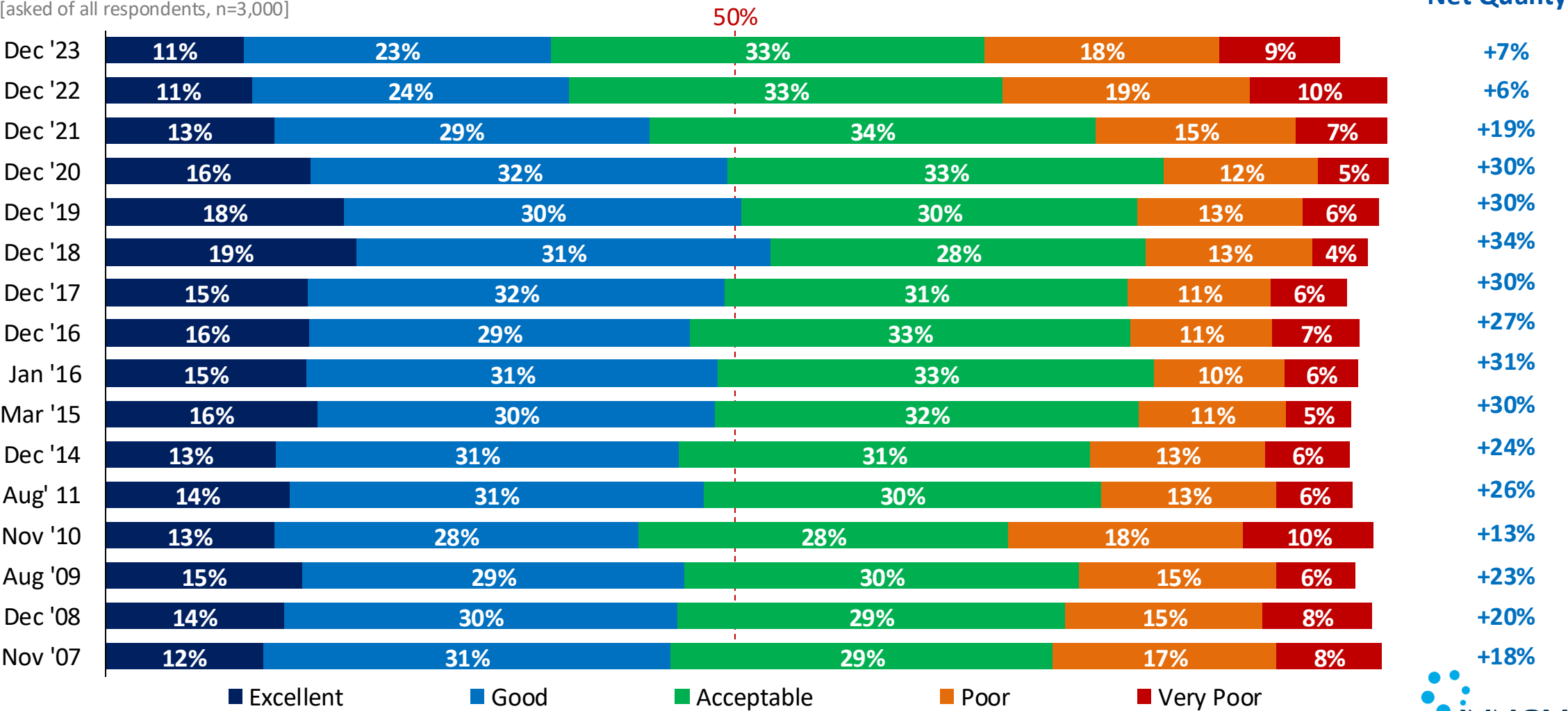
**Note:** "Don't know" and "Have not used any health care services" not shown

# Access to Services: Perceived ability to access services is steady with last year (+7%), lower than past tracking



Generally speaking, how would you describe your ability to access the health care services provided to you and your family in the last 12 months?

[asked of all respondents, n=3,000]



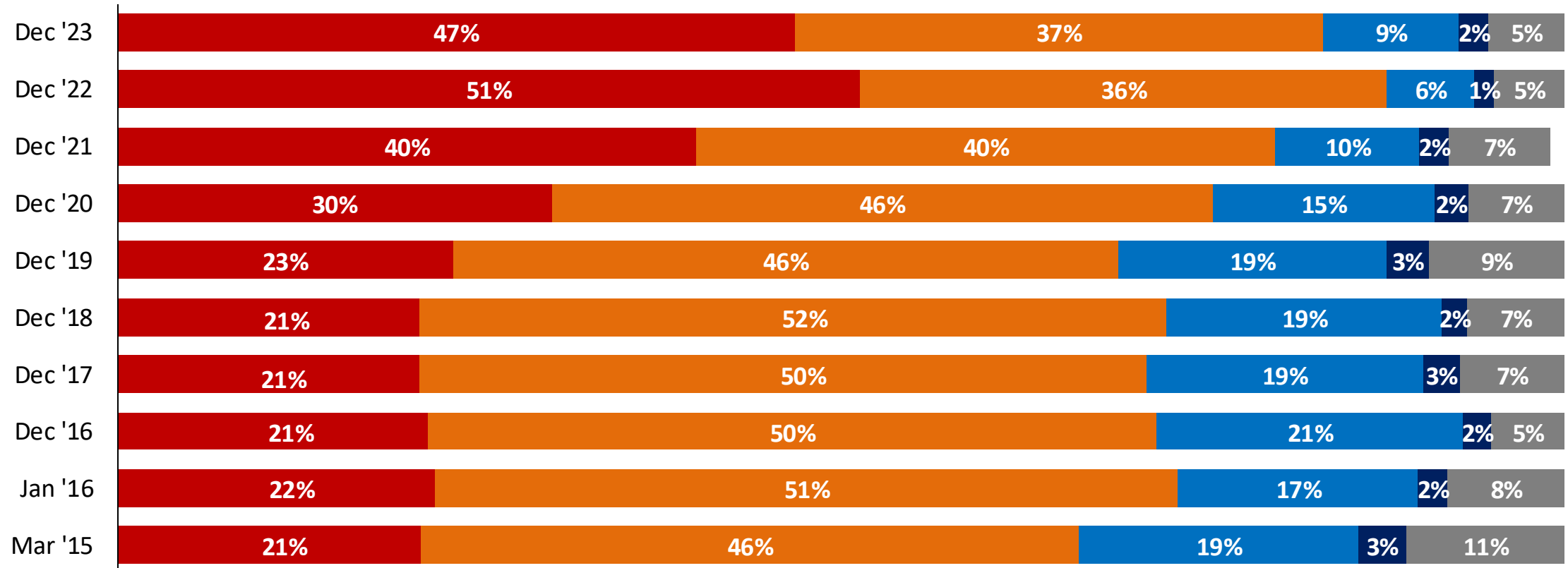
Note: "Don't know" and "Have not used any health care services" not shown

# System in Crisis: Belief that the system is in a real state of crisis is down 5 points after going up significantly in 2021



There has been a lot of talk about the state of the health care system in [PROVINCE] lately. Which one of the following four statements best reflects your own opinion:

[asked of all respondents in W1 and W2, n=1,500]



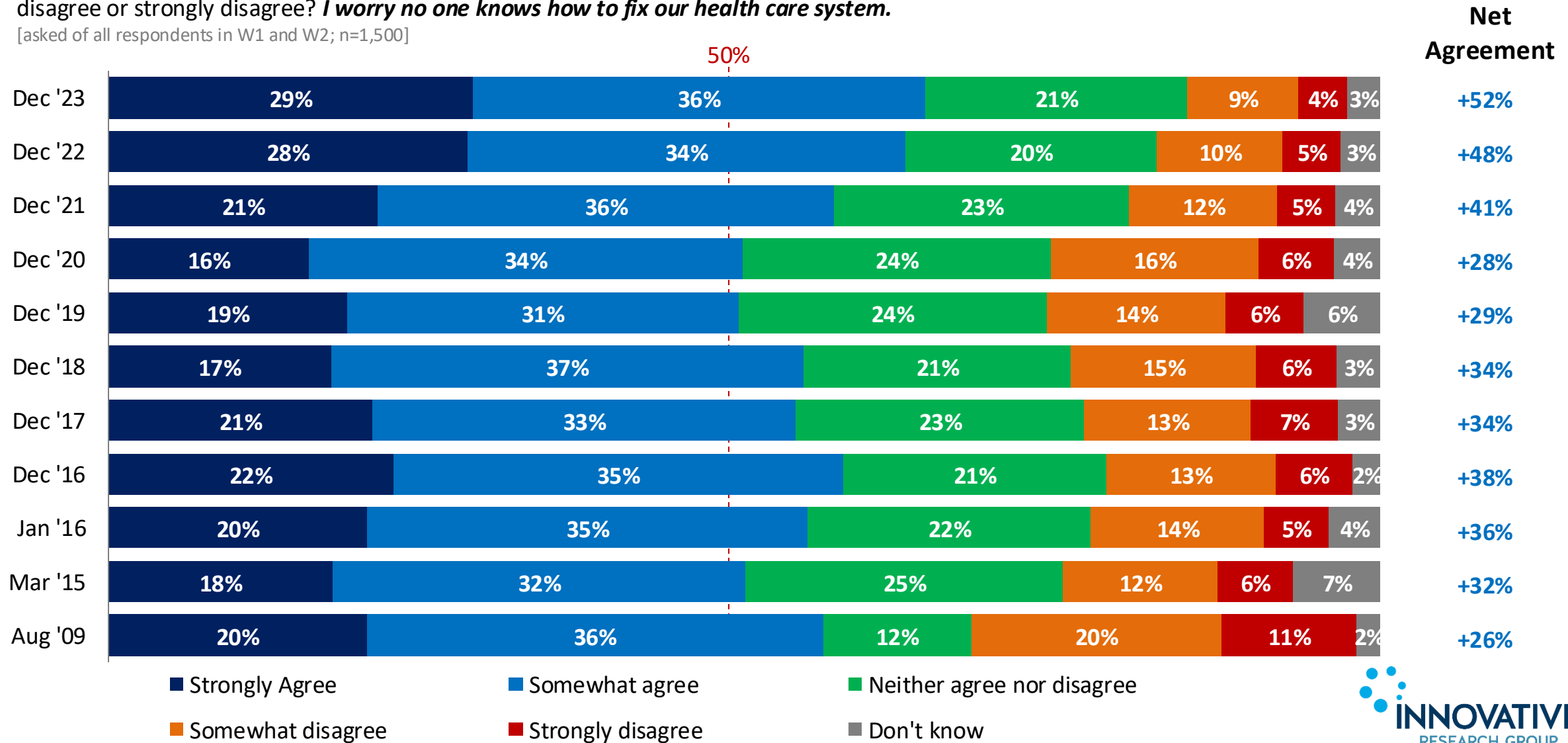
- The health care system is in a real state of crisis
- There are serious problems with our health care system, but it is not a crisis yet
- There are problems in our health care system, but they are not that serious
- There are no real problems in our health care system
- Don't know

# Worry No One Can Fix It: With a net of +52%, worry that no one knows how to fix the system continues to rise to the highest recorded

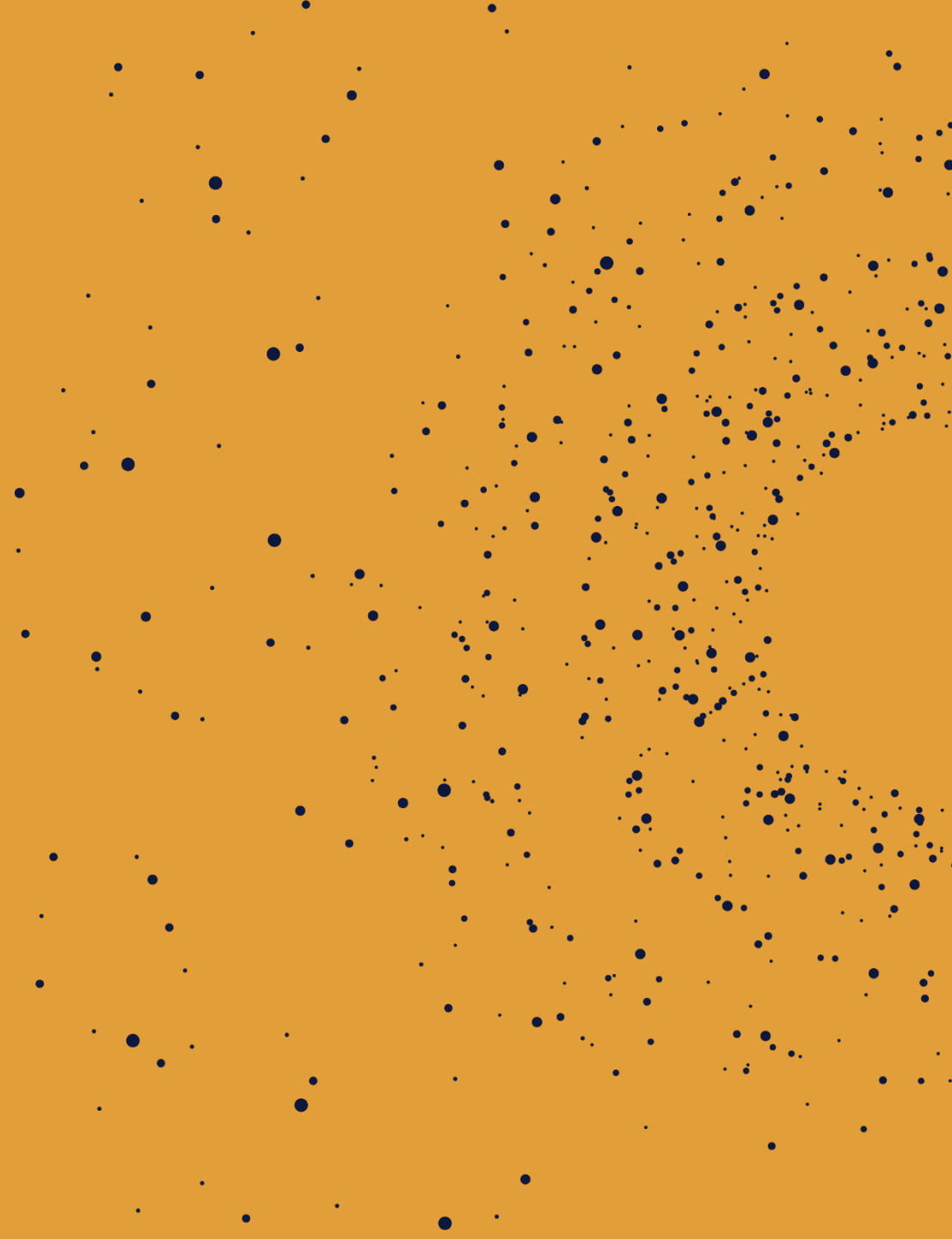


For each of the following statements about health care please indicate if you strongly agree, somewhat agree, somewhat disagree or strongly disagree? ***I worry no one knows how to fix our health care system.***

[asked of all respondents in W1 and W2; n=1,500]



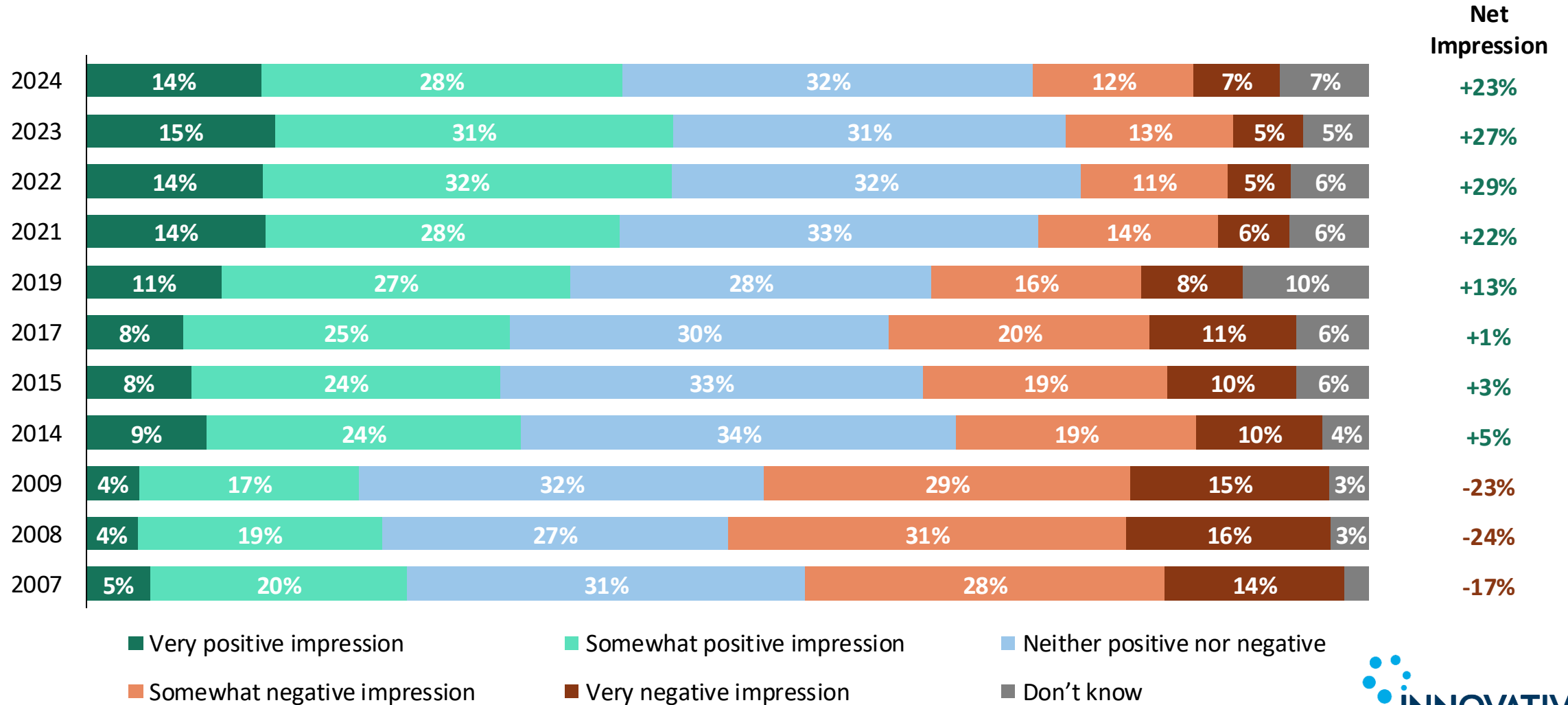
**Indigenous**



# Impression:

Net impression on Indigenous peoples' organizations down 5 pts at +23%

**Q** When you think of Canada's Indigenous peoples' groups or organizations in general, do you have a...?  
[asked of all respondents, n=2,000]

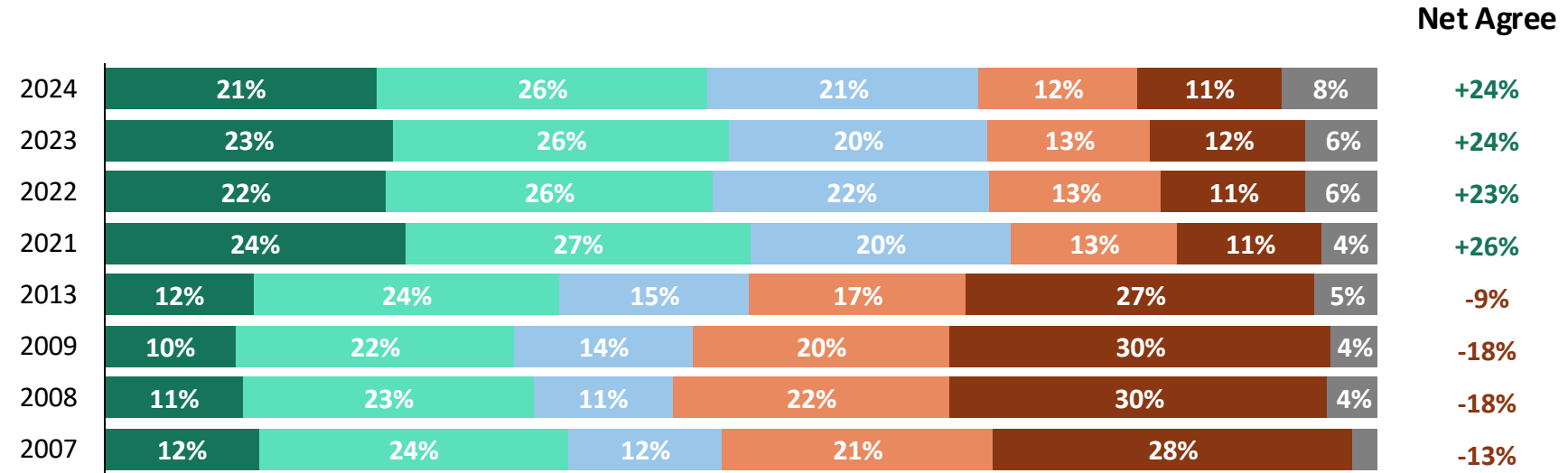


# Attitudes and Values – Rights:

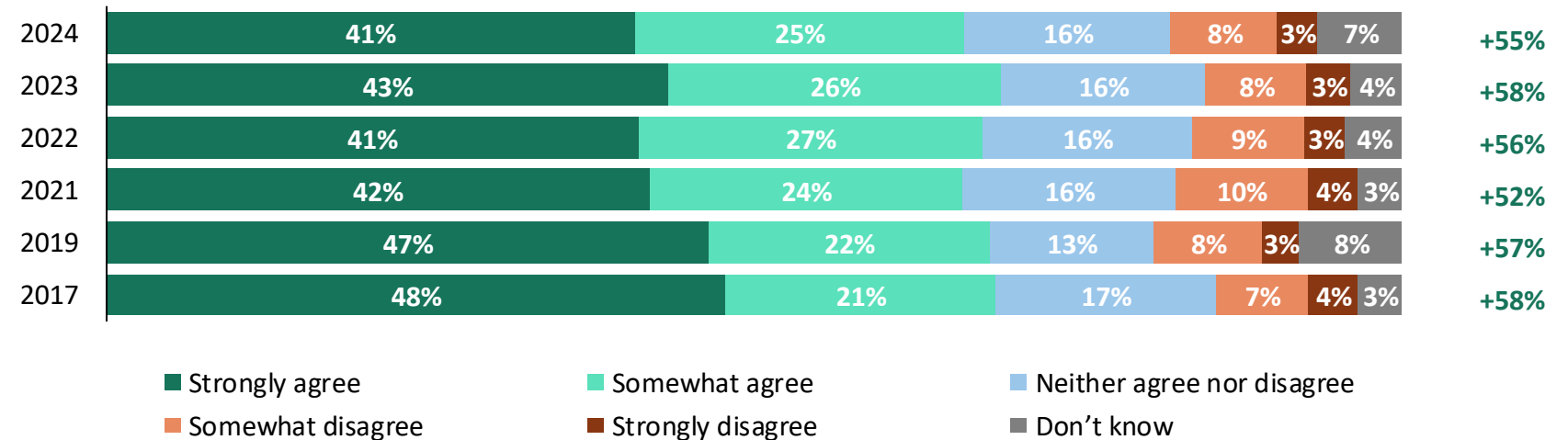
Attitudes around rights have been relatively stable over the past few years

**Q** Please indicate if you agree or disagree with the following statements about the UN declaration:  
[asked of all respondents, n=2,000]

Indigenous peoples should have the rights and status they need to protect their culture and heritage, even if it means they may have certain rights other Canadians do not have.



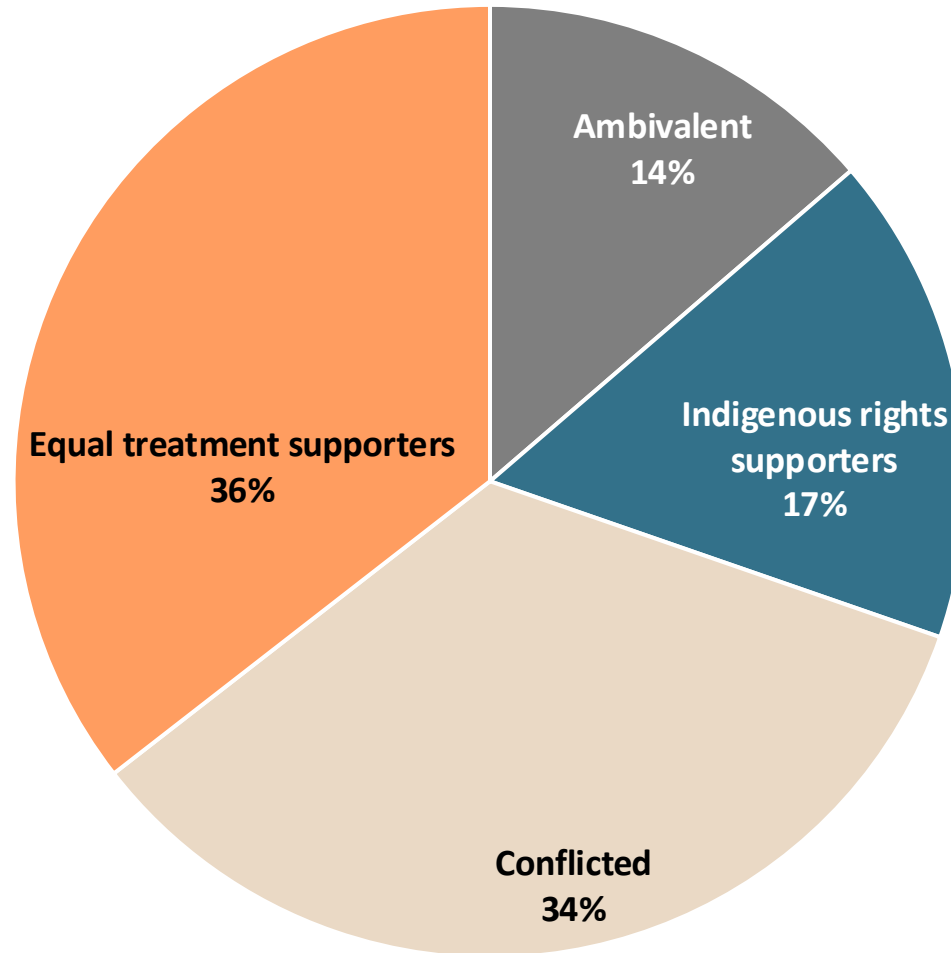
Canada's Indigenous peoples should have the same rights as any other Canadian, no more and no less.



# Indigenous Attitudes Segmentation:

Most Canadians are either *equal treatment supporters* (36%) or *conflicted* (34%)

Based on the two statements “Canada’s Indigenous peoples should have the same rights as any other Canadian, no more and no less” and “Indigenous peoples should have the rights and status they need to protect their culture and heritage, even if it means they may have certain rights other Canadians do not have,” we have segmented the population by their attitudes towards Indigenous rights.



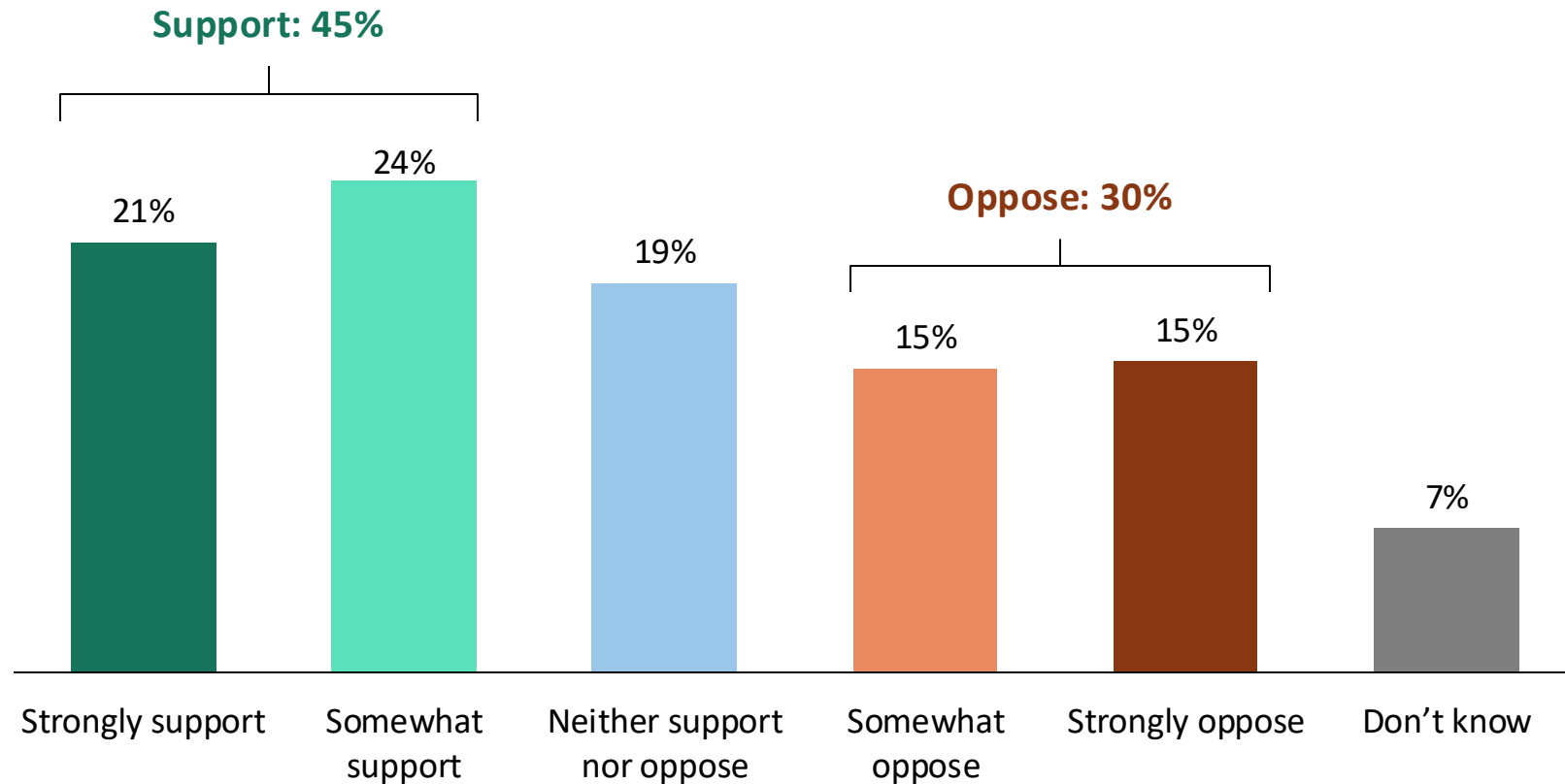
# Restrictions on Mining Permits:

A plurality (45%) support restrictions on mining permits while 30% oppose; support is highest among *Core Left*



Earlier this year, the BC government announced an interim order placing restrictions on previously-issued mining permits in two BC First Nation traditional territories. These measures prevented mineral developers and prospectors to exercise their permit rights without the consent of the respective Nations. Do you support or oppose the BC government's interim order of placing restrictions on mining permits unless local First Nations agree to the activities?

[only asked of BC respondents, n=278]



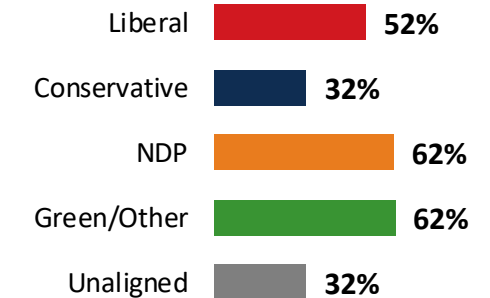
## Segmentation: 2024

Respondents who say 'Support'

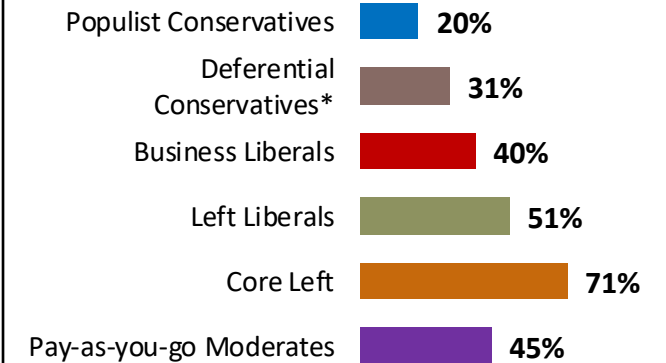
### Indigenous Ancestry



### Federal Party ID



### Value Cluster



**NOTE:** \*This indicates a n-size equal to or less than 30. Please treat results with caution.



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**Building Understanding.**