

“

*Build, baby,
build*

”

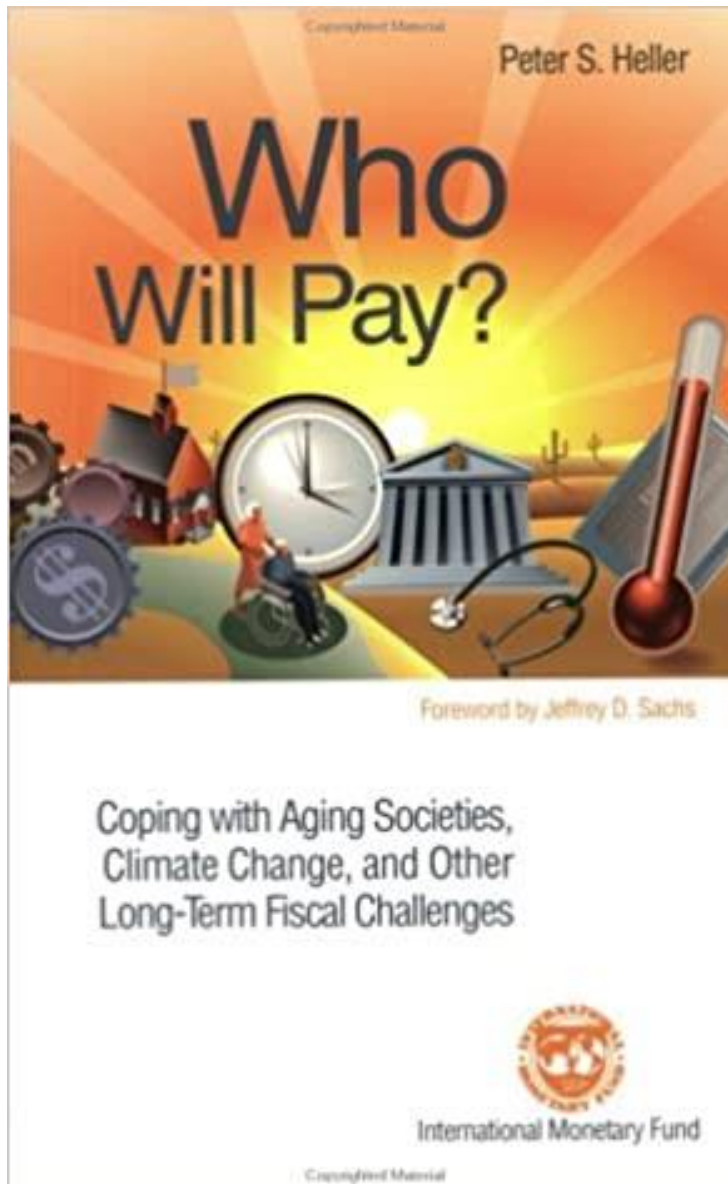
A Moment Too Good to Lose

CCRE Roundtable

Presentation
Date: June, 2025

The Fundamentals

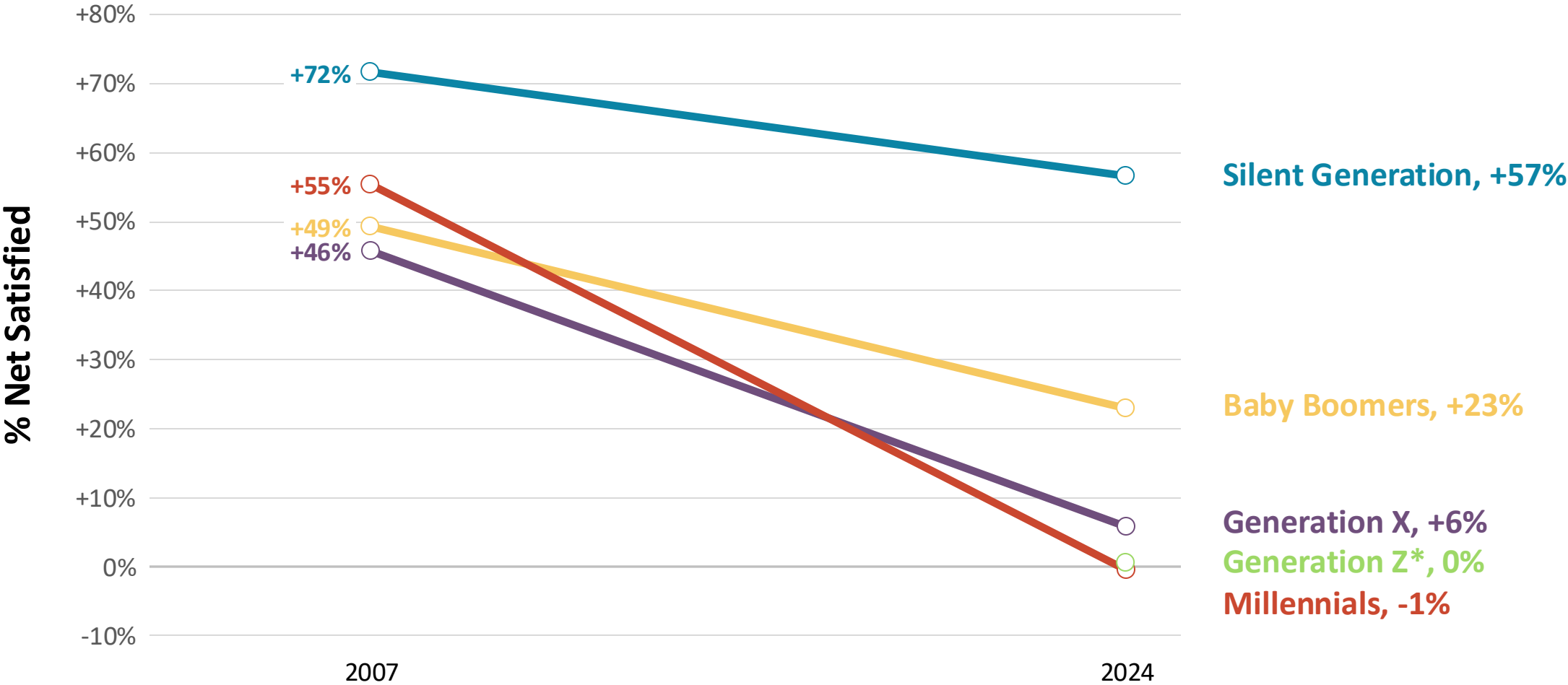
We left off on fundamental challenges that are changing Canadian realities



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.

The politics of scarcity is also focusing us more on materialist concerns

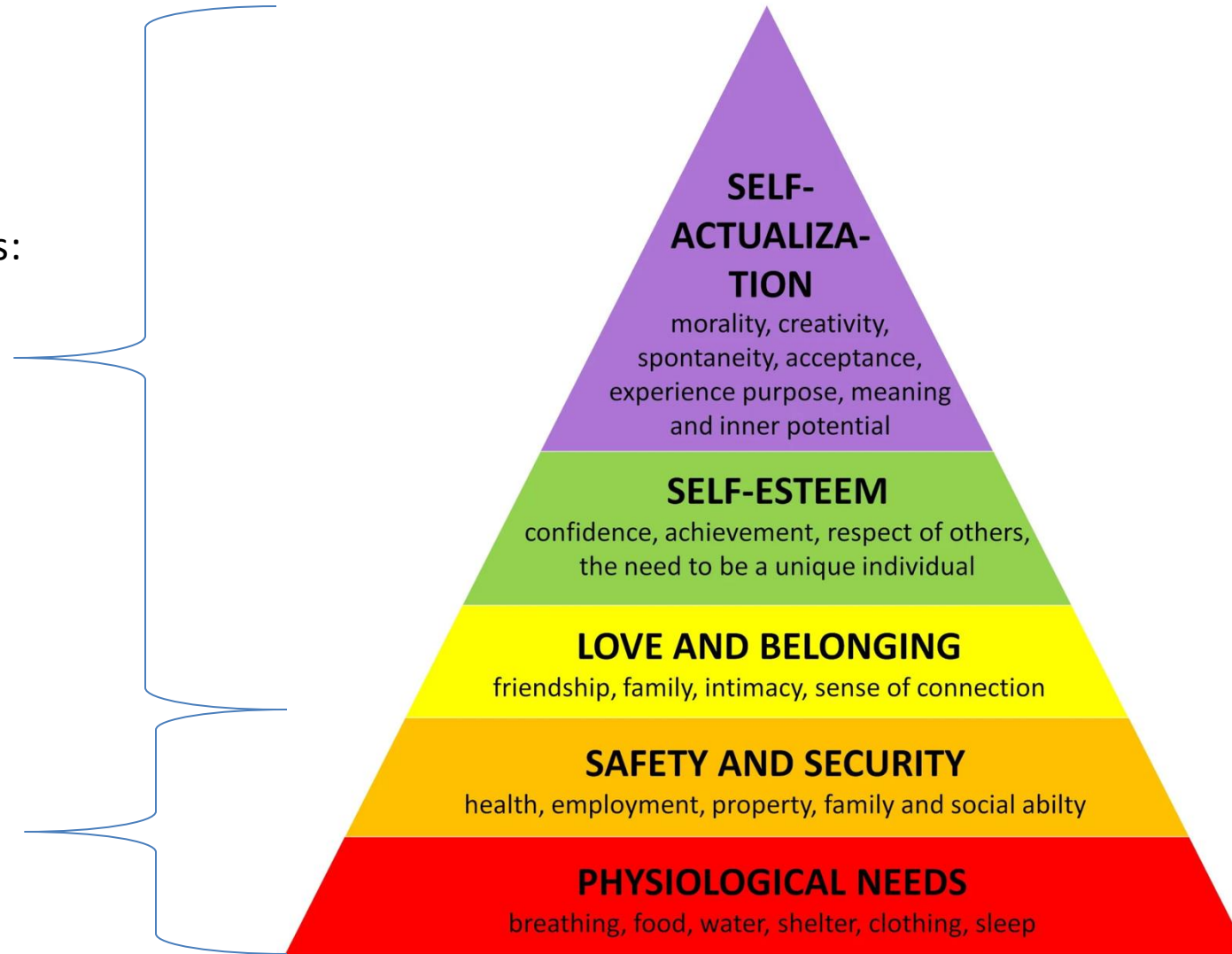
5

Post Materialism Issues:

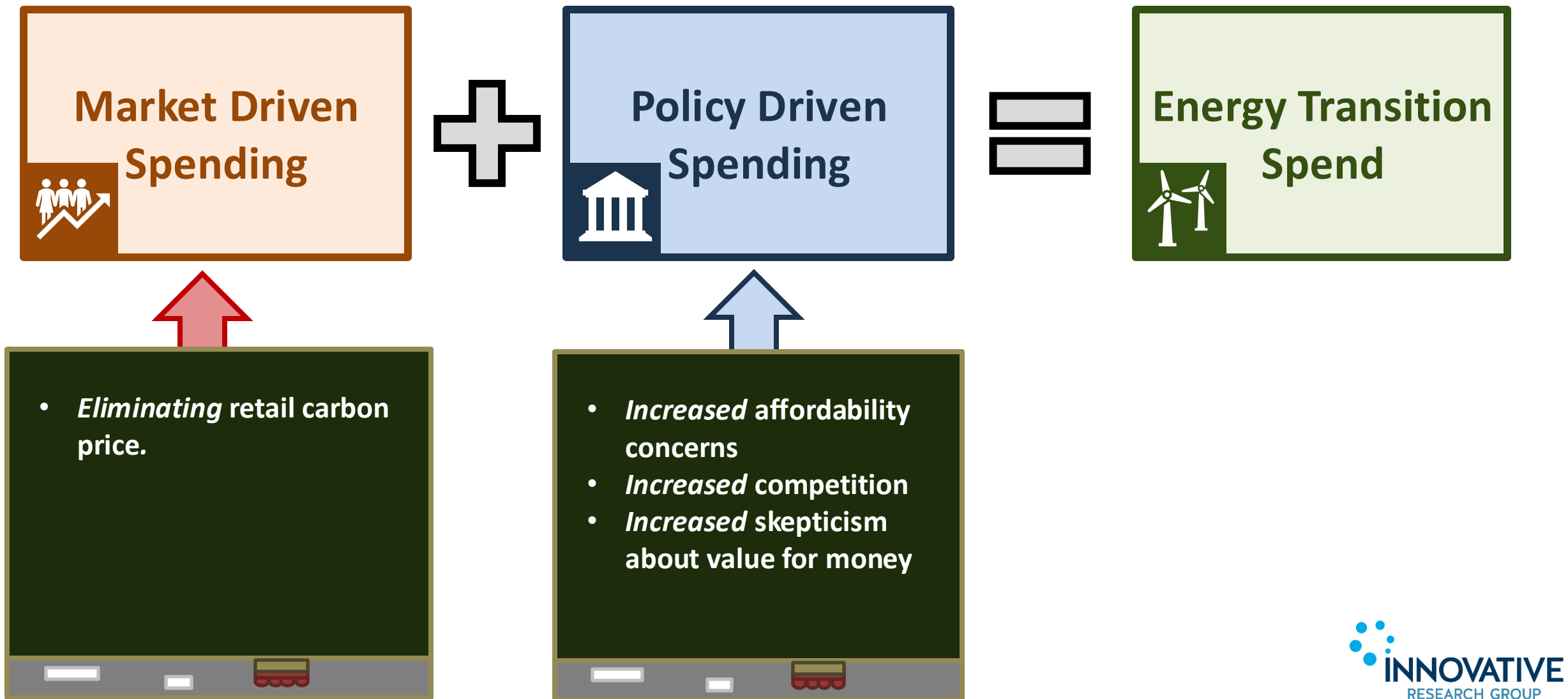
- Reconciliation
- Gender Equity
- Environment

Materialist Issues:

- Affordability
- Housing
- Safety



Those changes are impacting energy transition math



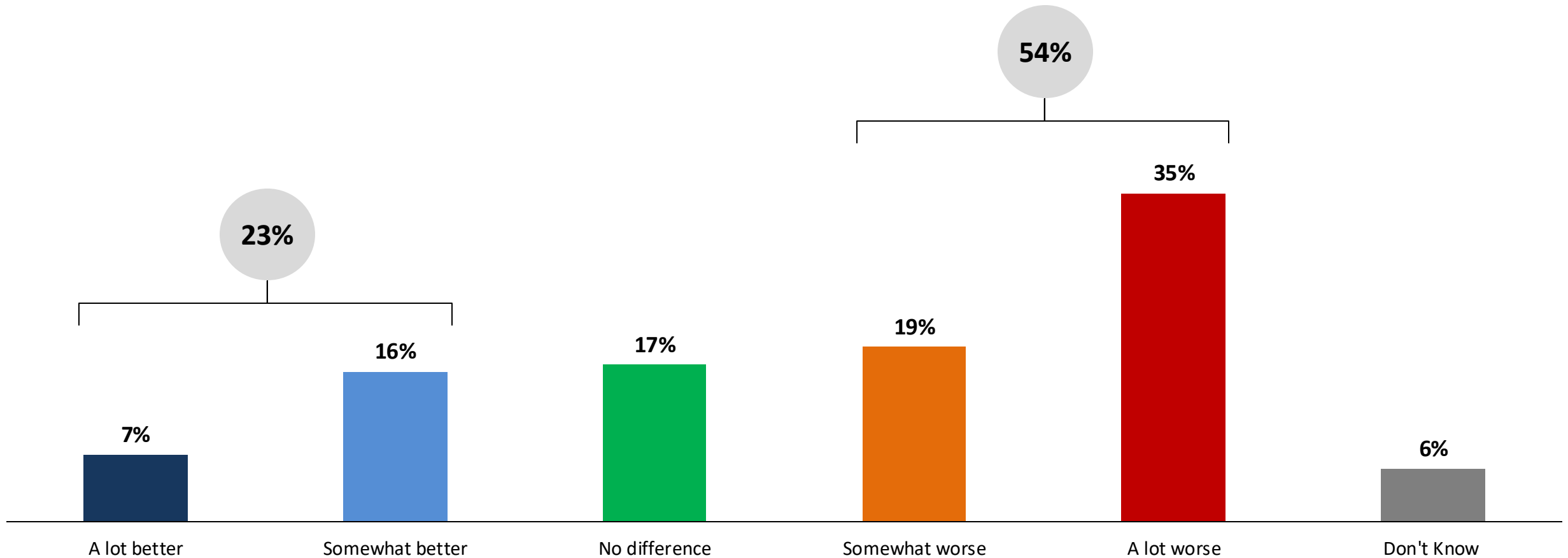
How Did We Get Here?

January - Setting the Stage

Trudeau Attitude:

Over half think that Trudeau has made things worse for them

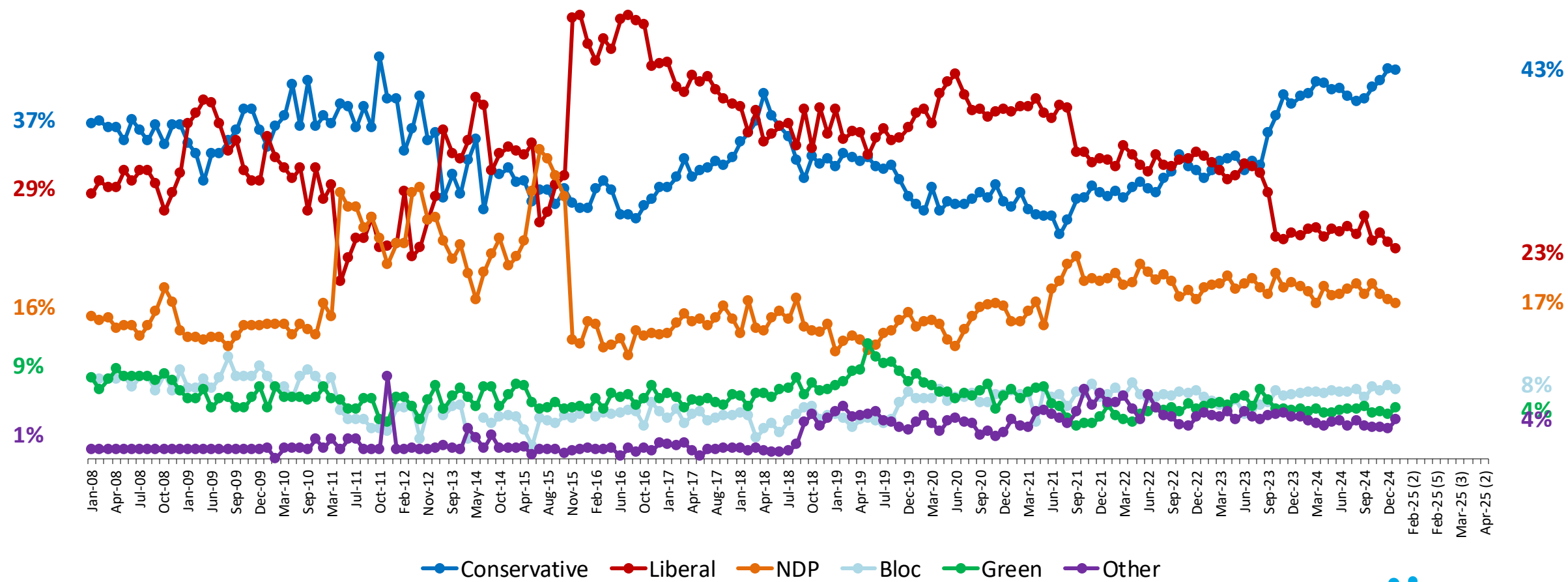
Q As you probably have heard, Justin Trudeau has resigned as Prime Minister. After serving as Prime Minister for the past 9 years, do you think Justin Trudeau has made things better or worse for people like you in Canada?
[asked of all respondents, n=1,000]



Federal Decided Vote Tracking: CPC leads by 20-points in January

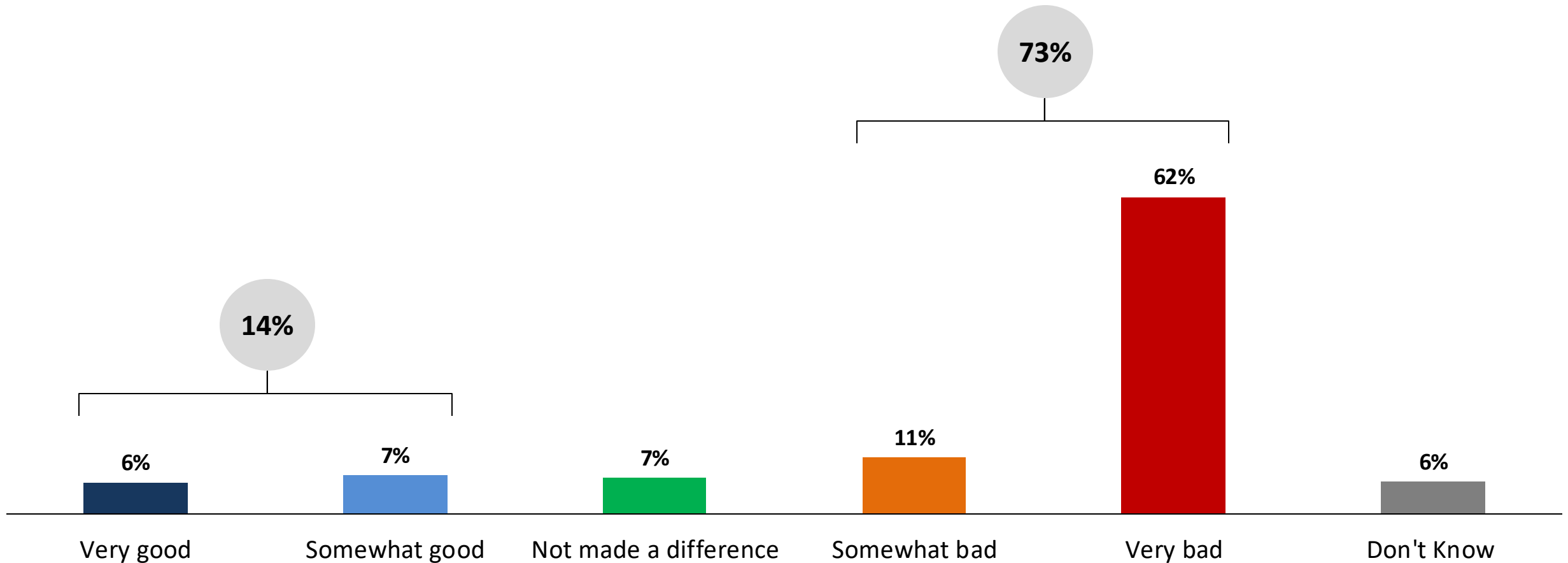


If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? [DECIDED]
[asked only decided voters; n=912]



Trump shocks Canadians with 51st State comment

Q Donald Trump has suggested Canada become the 51st state in the United States. Do you think Canada joining the United States would be a good thing for Canada or a bad thing for Canada?
[asked of all respondents, n=1,000]



Best Leader for Canada-US Relations: Those who are excited prefer Poilievre but those afraid prefer Trudeau

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

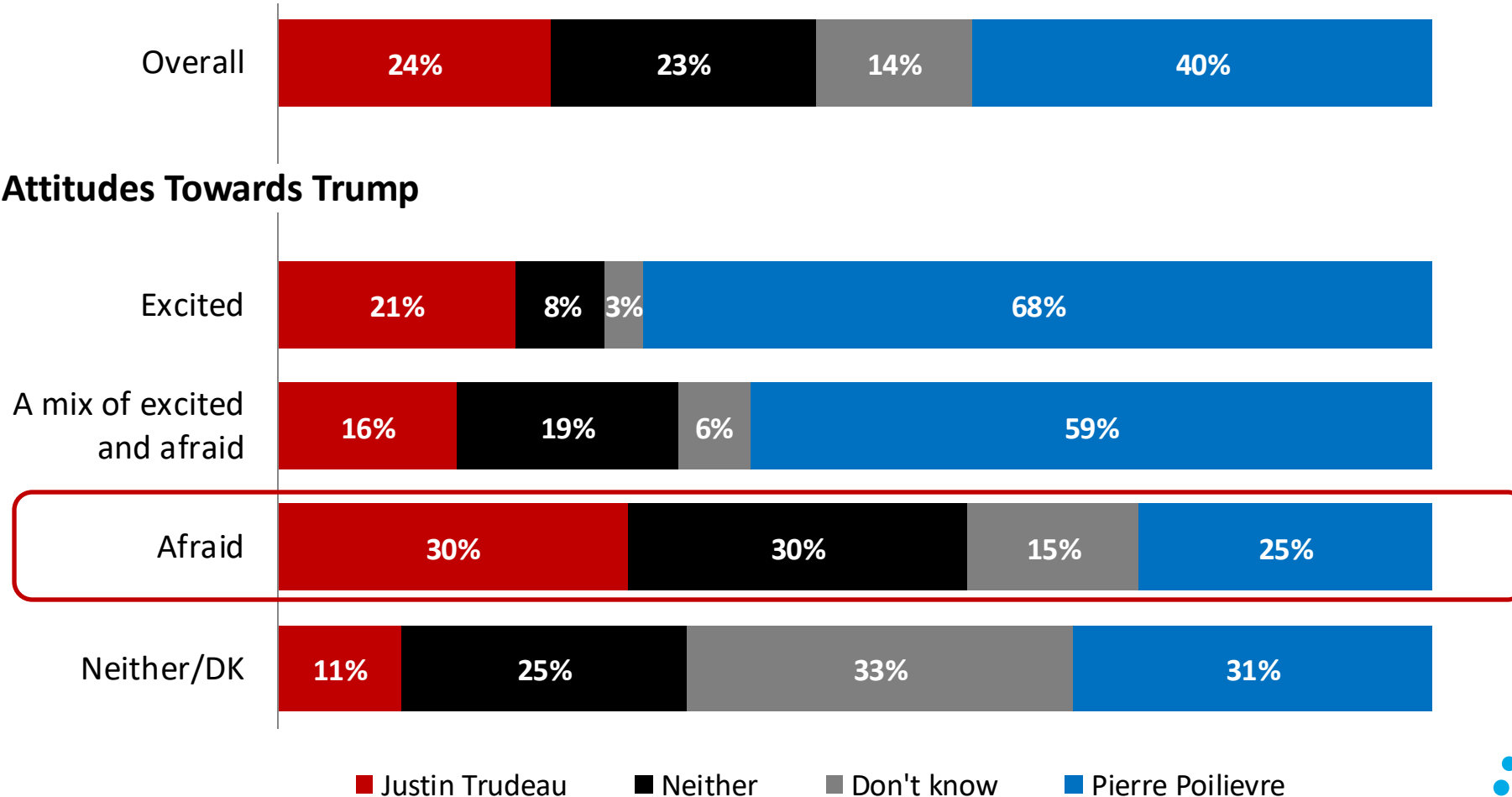


Justin Trudeau



Pierre Poilievre

Attitudes Towards Trump

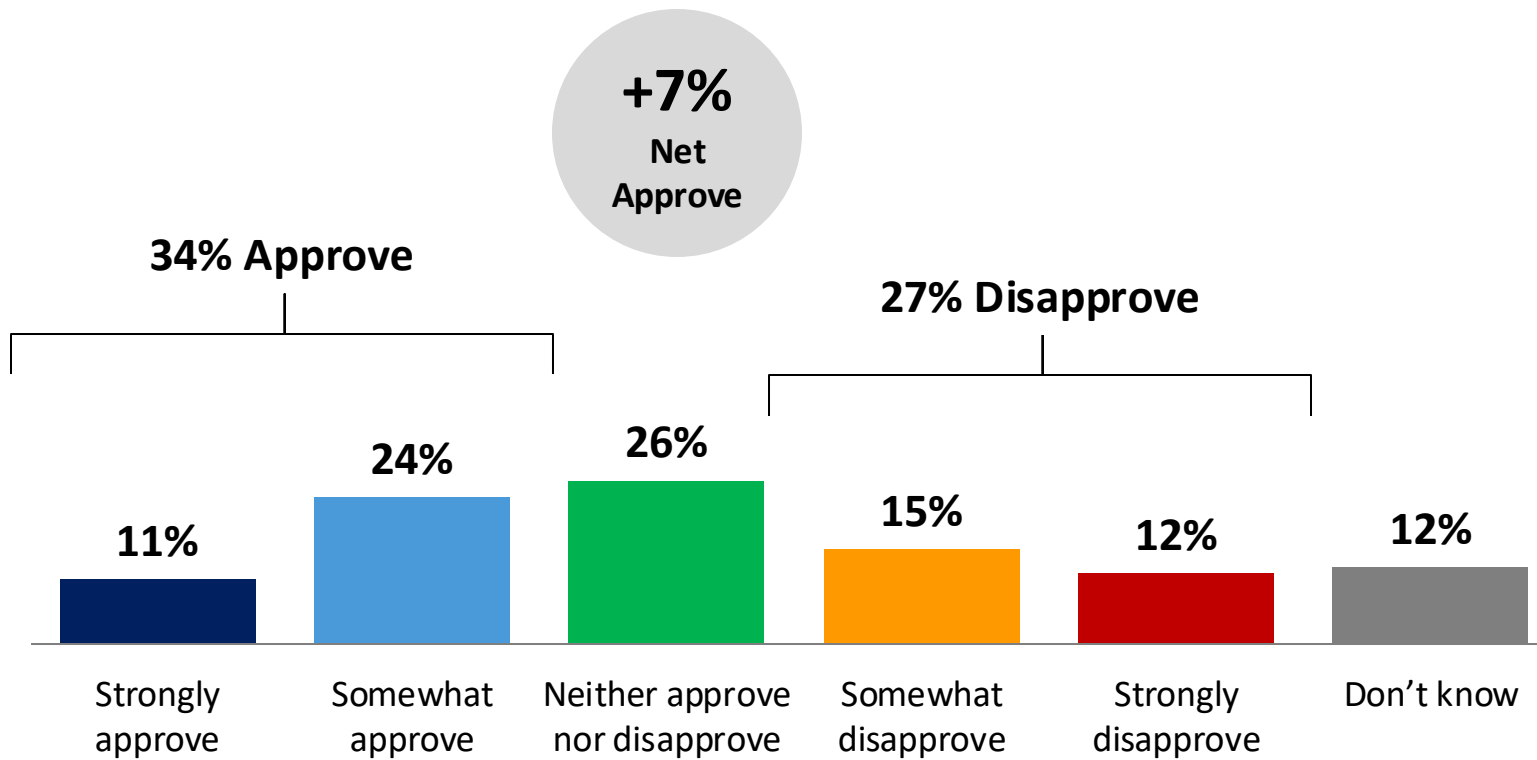


January Federal Trump Approval:

Canadians appear divided in their approval for the federal government's approach

Q

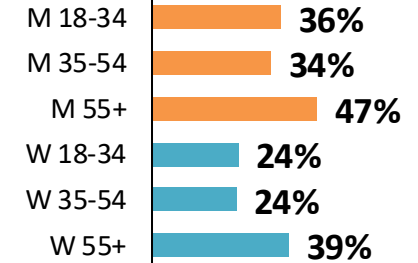
Now thinking about the federal government do you approve or disapprove of the way the Federal government is responding to issues resulting from Donald Trump's presidency?
[asked of all respondents; n=1,000]



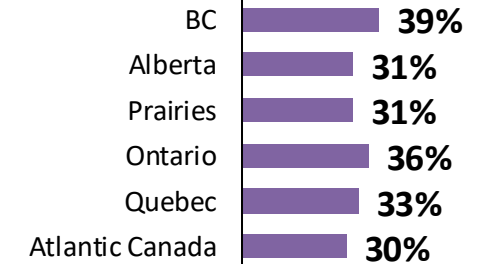
Segmentation

Those who say 'Approve'

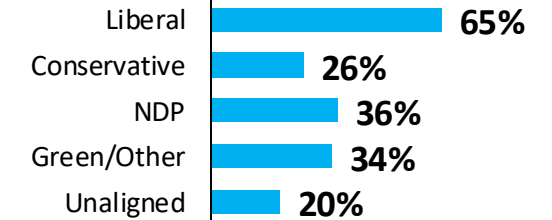
Age-Gender



Region



Party ID



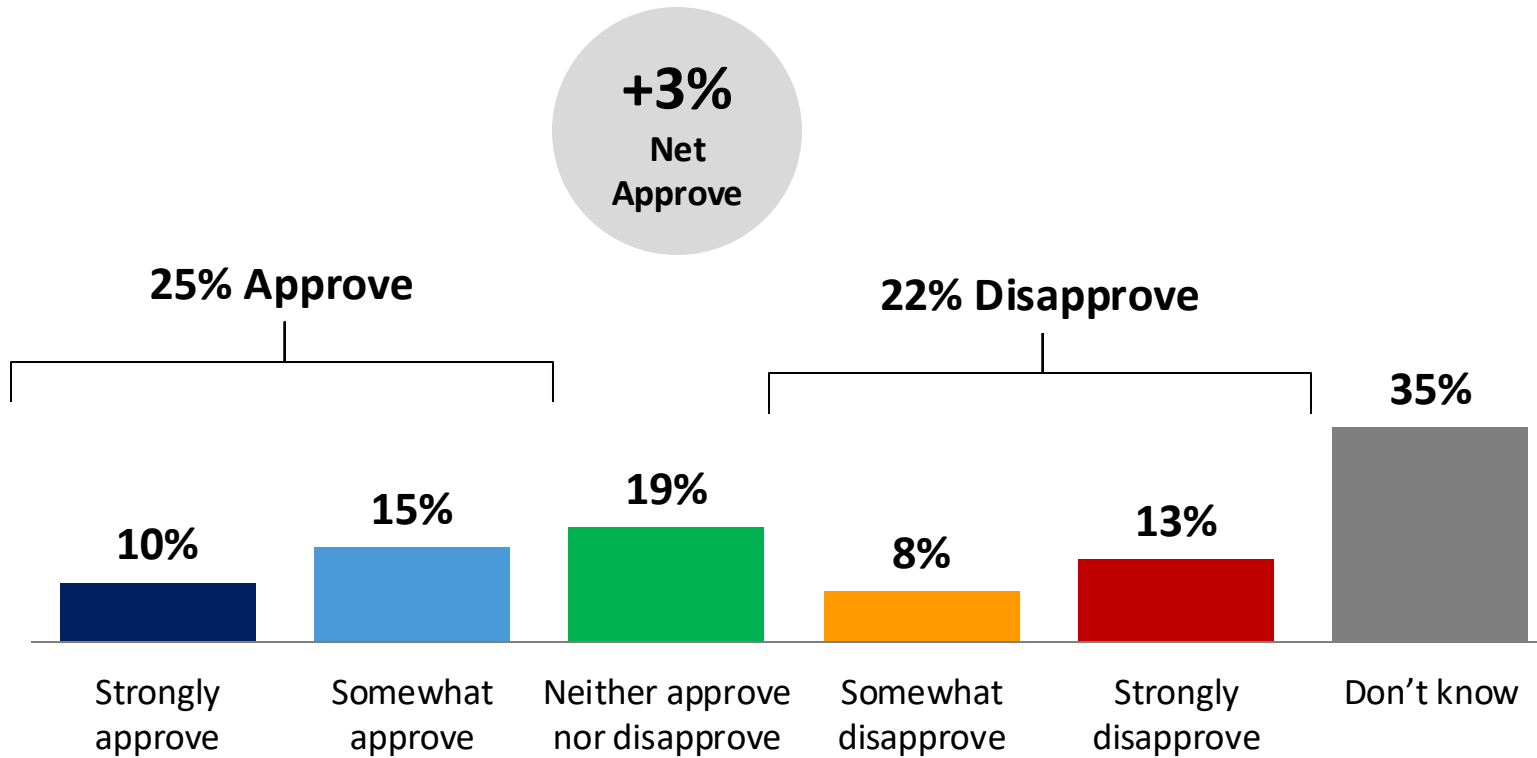
Pierre Poilievre and the Conservatives' Trump Approval:

Overall approval for Poilievre's approach is slightly lower than that of the federal government

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?

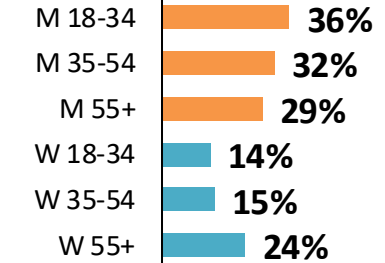
[asked of all respondents; n=1,000]



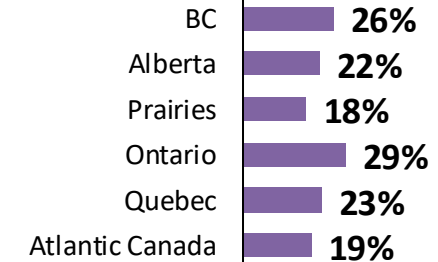
Segmentation

Those who say 'Approve'

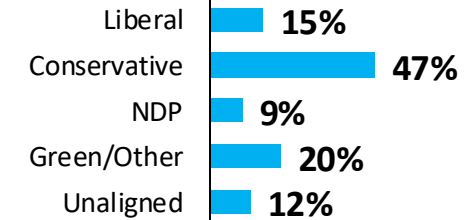
Age-Gender



Region



Party ID



February to Mid-March: Tariff Showdowns

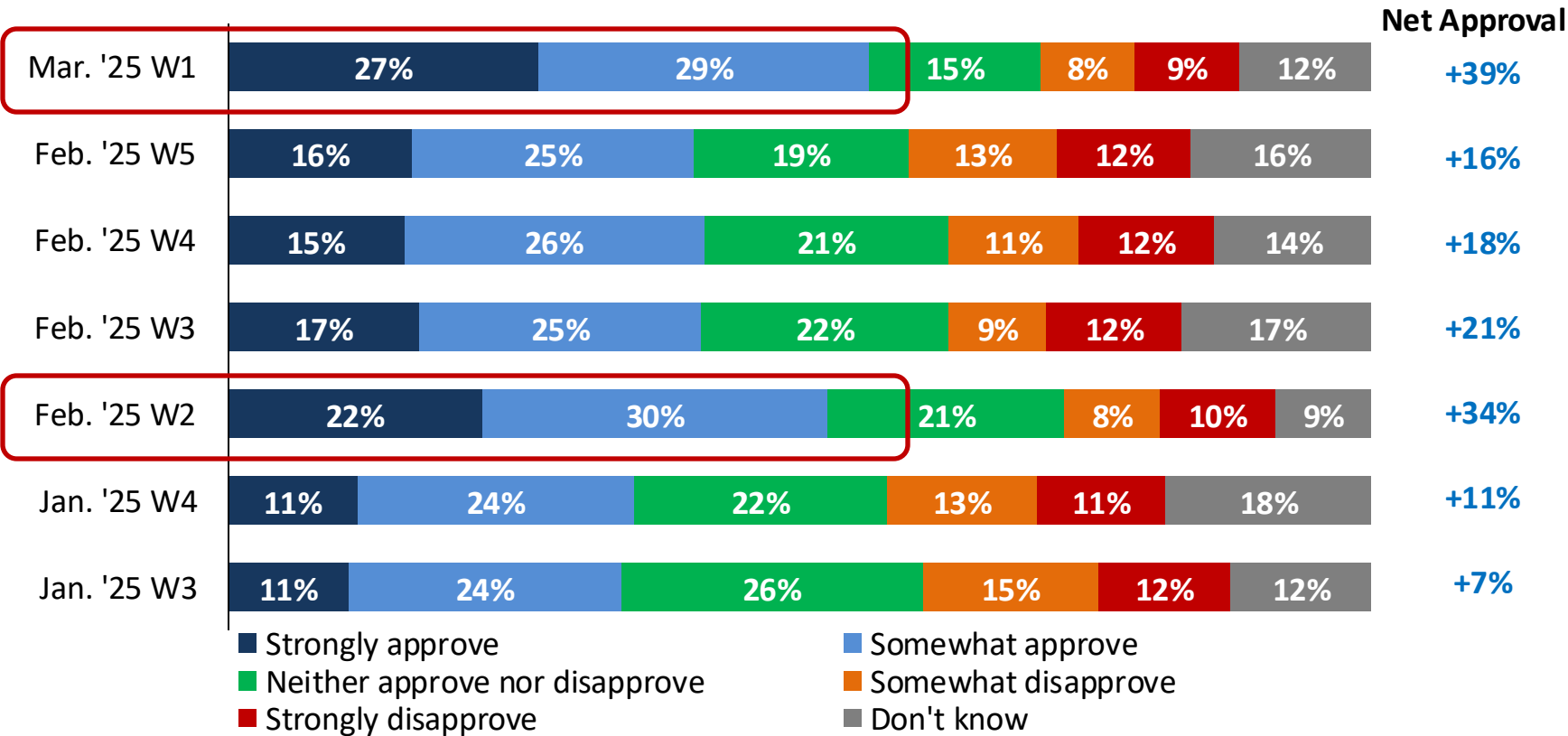
Federal Leadership Approval:

After March 6th's delaying of tariffs, net approval of the Federal government is up 23 points

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?

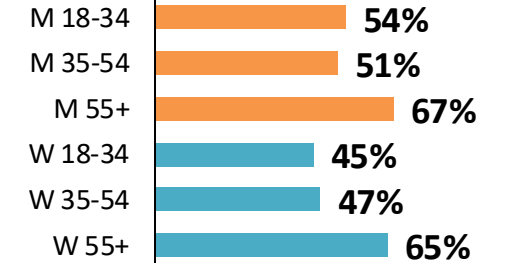
[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000]



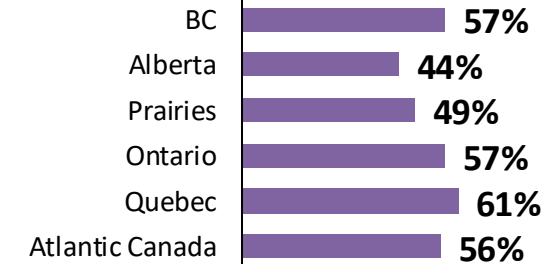
Segmentation

Those who say 'Approve'

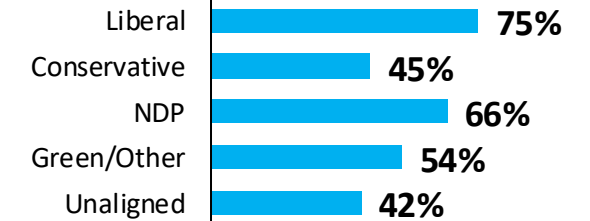
Age-Gender



Region



Party ID



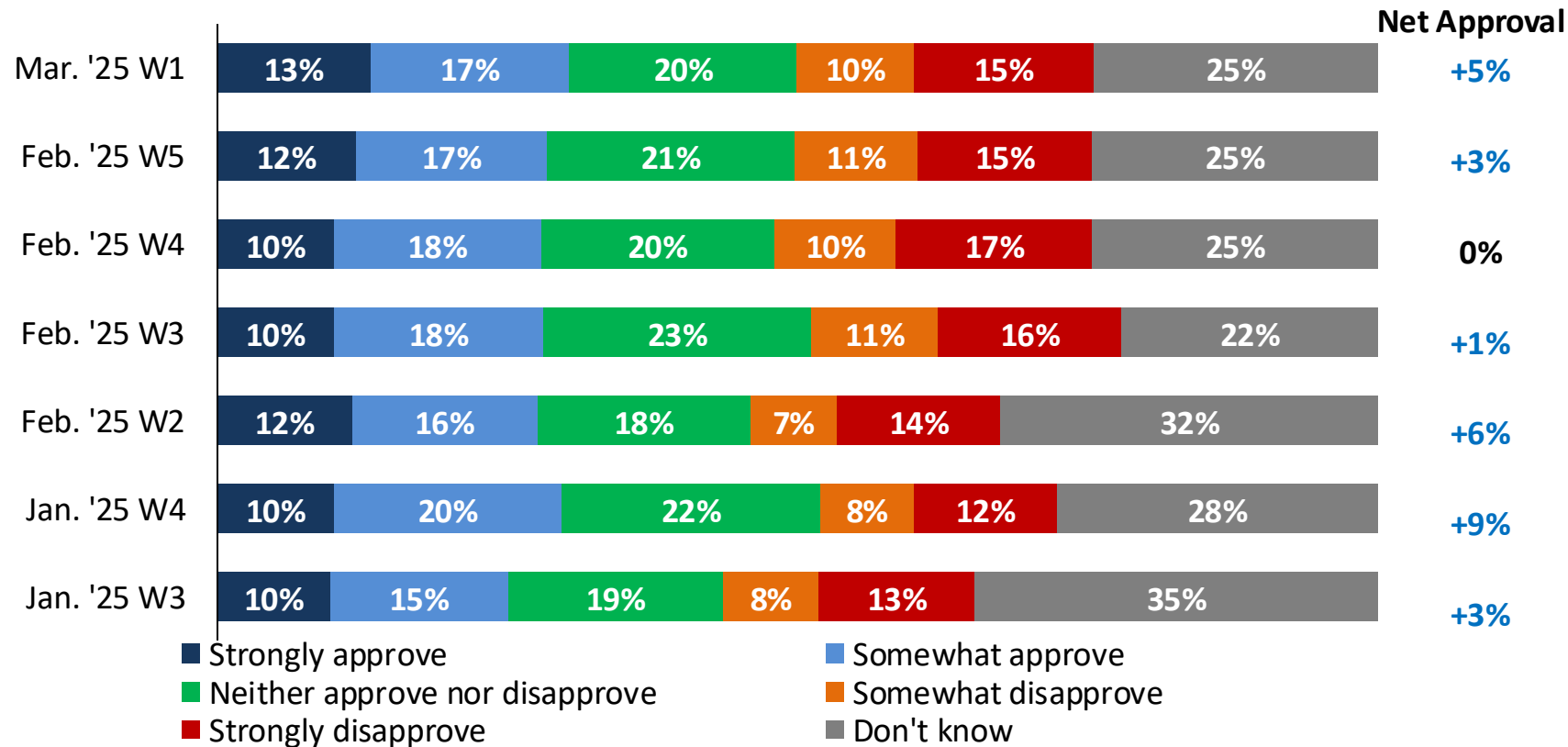
Pierre Poilievre and the Conservatives' Approach:

Net approval is marginally steady at 5 points, coming mainly from men under 54 and not crossing party lines.

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?

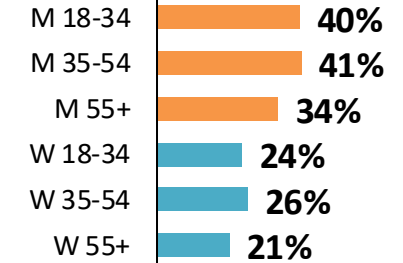
[asked of all respondents, Jan. '25 W3 n=1,000; Jan. '25 W4 n=500; Feb. '25 W2 n=1,000; Feb. '25 W3 n=1,000; Feb. '25 W4 n=1,000; Feb. '25 W5 n=1,000; Mar. '25 W1 n=1,000]



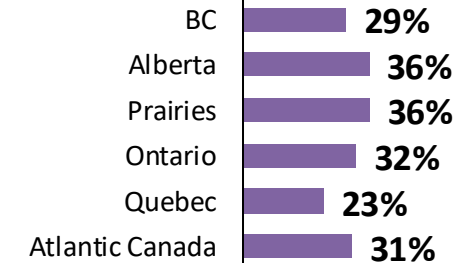
Segmentation

Those who say 'Approve'

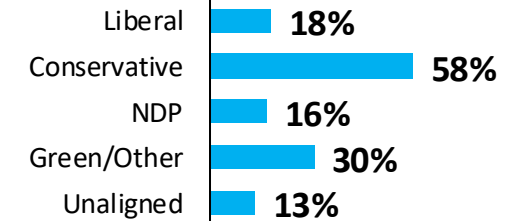
Age-Gender



Region



Party ID



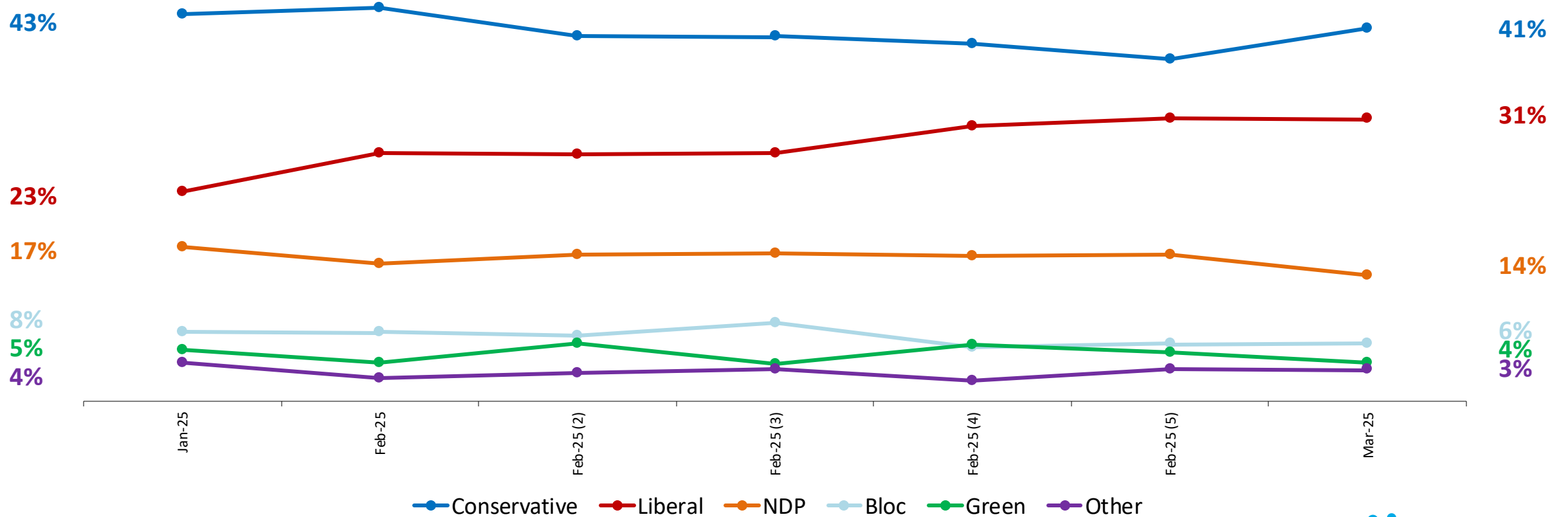
Early March Federal Decided Vote Tracking:

Conservative support bounces up for the first time in recent tracking, Liberals stay stagnant



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=906]



Leadership to Election

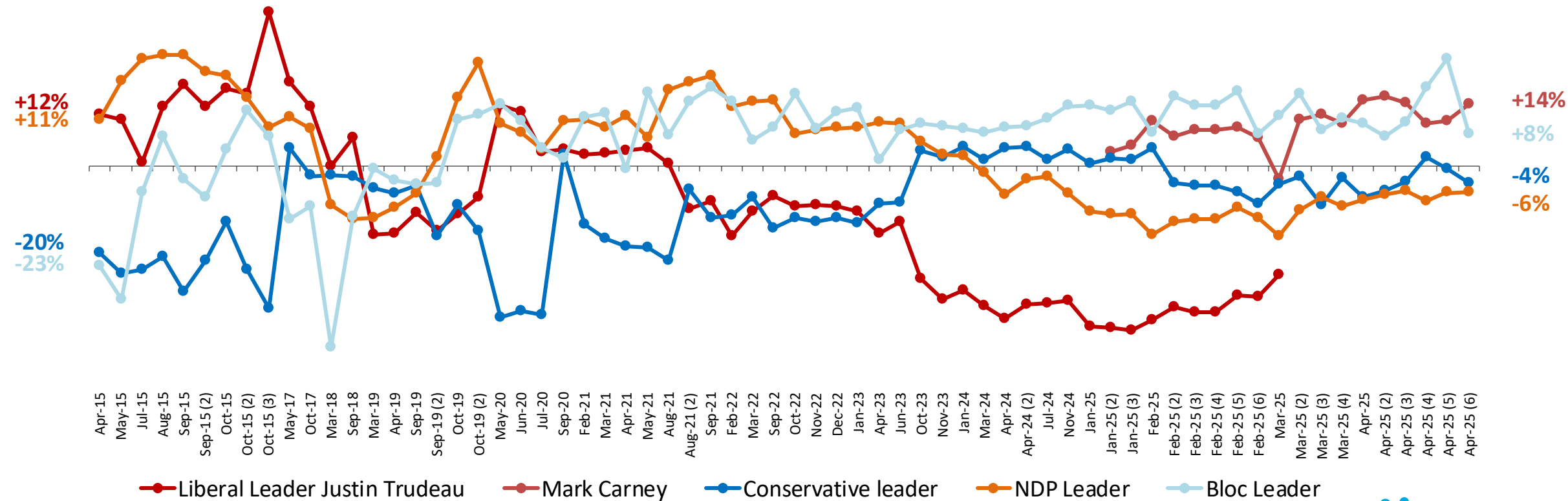
Party Leader NET Favourables Tracking:

Carney and Blanchet remain the only leaders with net positive ratings



Now we are going to provide you with several names of public figures. Please indicate whether you have heard of that person and, if so, whether you have a favourable or unfavourable impression of that person. If you do not recognize the name, just indicate that.

[asked of all respondents; n=0]

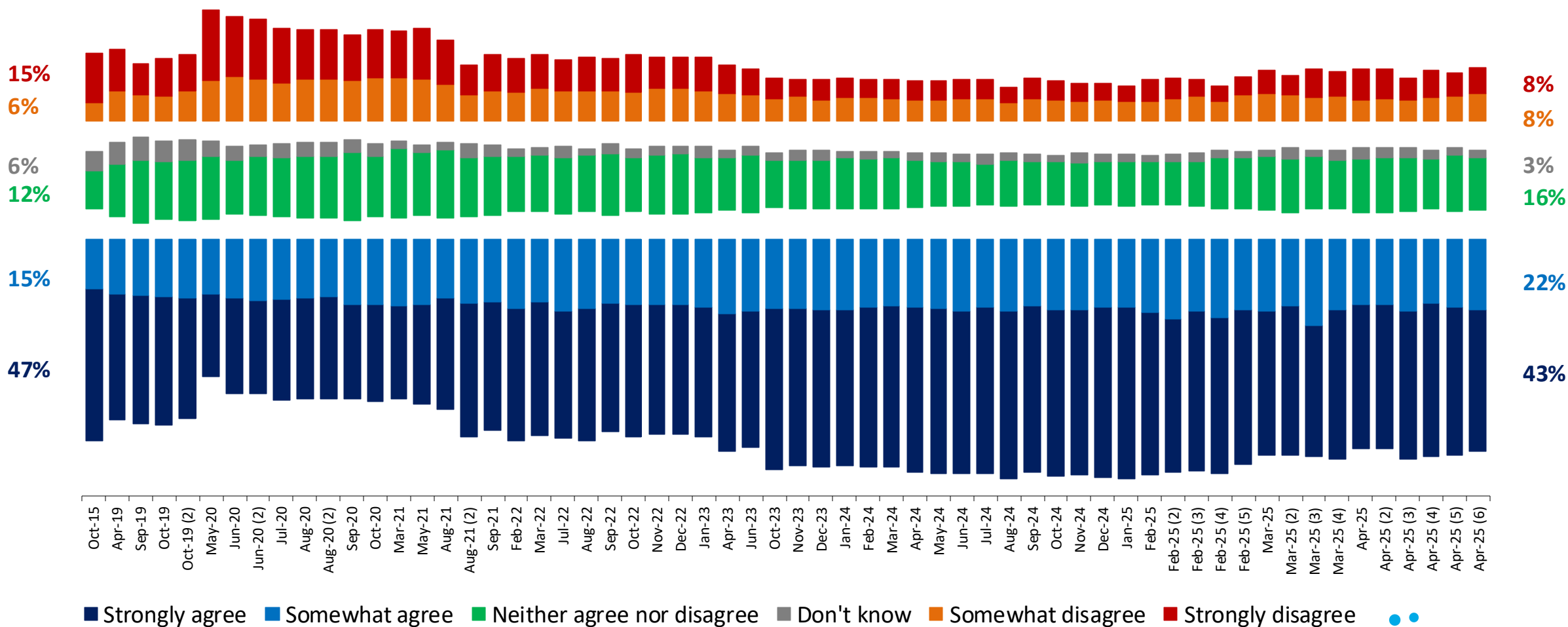


Time for Change: Agreement that it is time for a change remains high



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

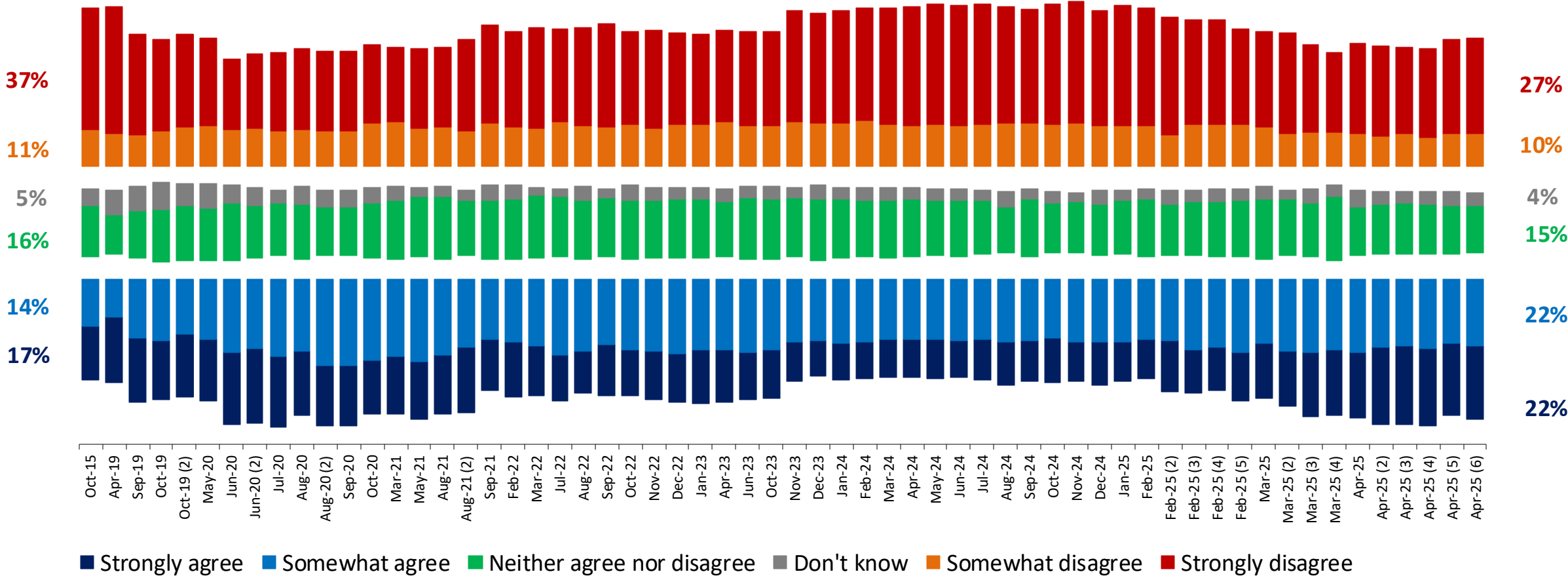
[asked of all respondents; n=1300]



Best of a Bad Lot: However, Canadians were more willing to say the Liberals are still best to form government



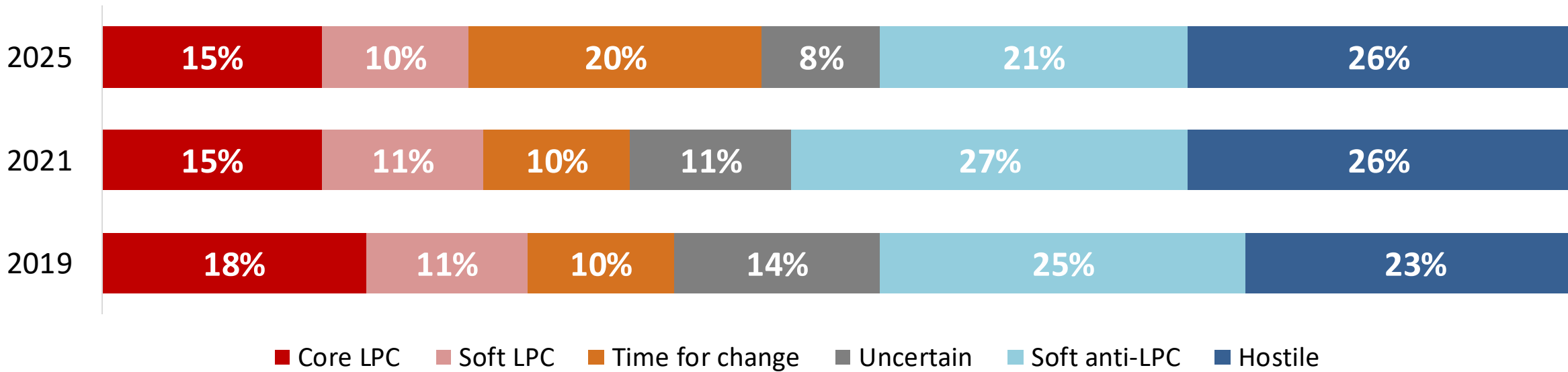
Do you agree or disagree with the following statements? - The Liberals may have their problems but they are still the best party to form government
[asked of all respondents; n=1300]



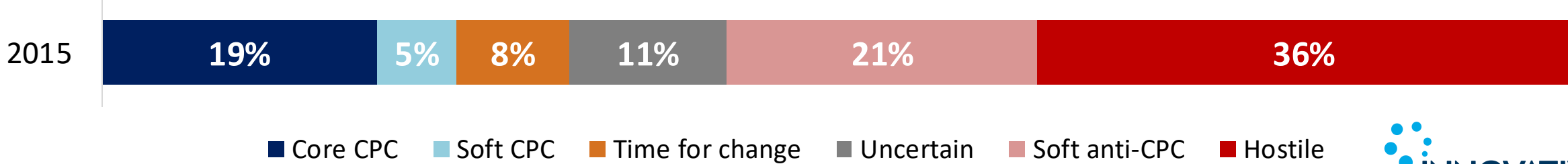
Time for Change Segmentation: And compared to the last 3 elections, there are twice as many conflicted “Time for change” voters

Time for Change segmentation BY Election

Liberal incumbent



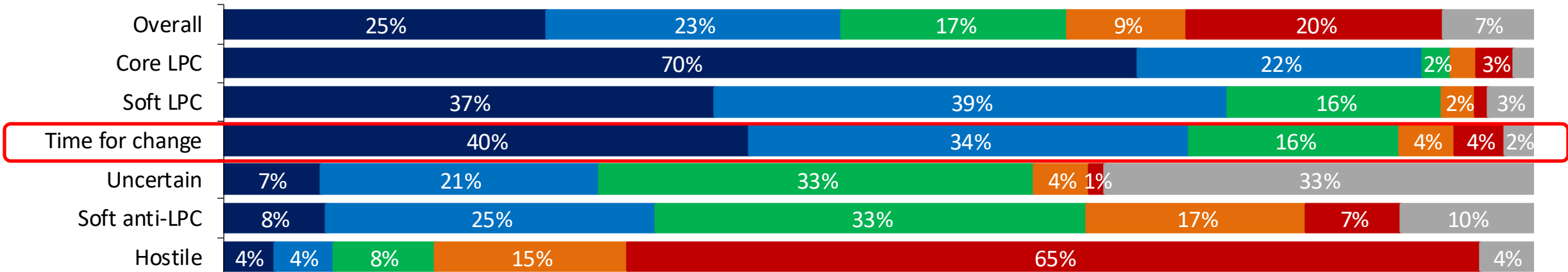
Conservative incumbent



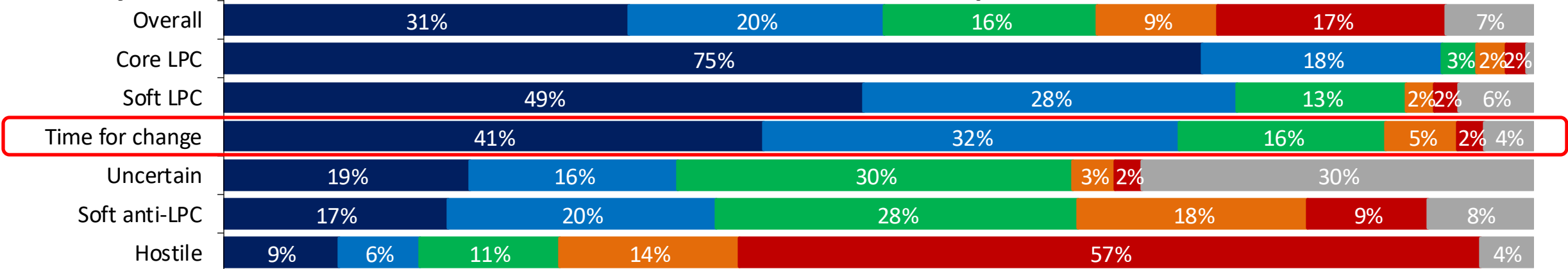
Among this key battleground segment, over 70% agree both that Carney is uniquely equipped and Poilievre is too much like Trump

Q Do you agree or disagree with the following statements?
[data from April 2025 Election Survey (April 15th-20th, 2025); asked of all respondents; n=2000]

Mark Carney’s experience leaves him uniquely equipped to lead Canada at this time



The way Pierre Poilievre talks and acts is too much like Donald Trump for me



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

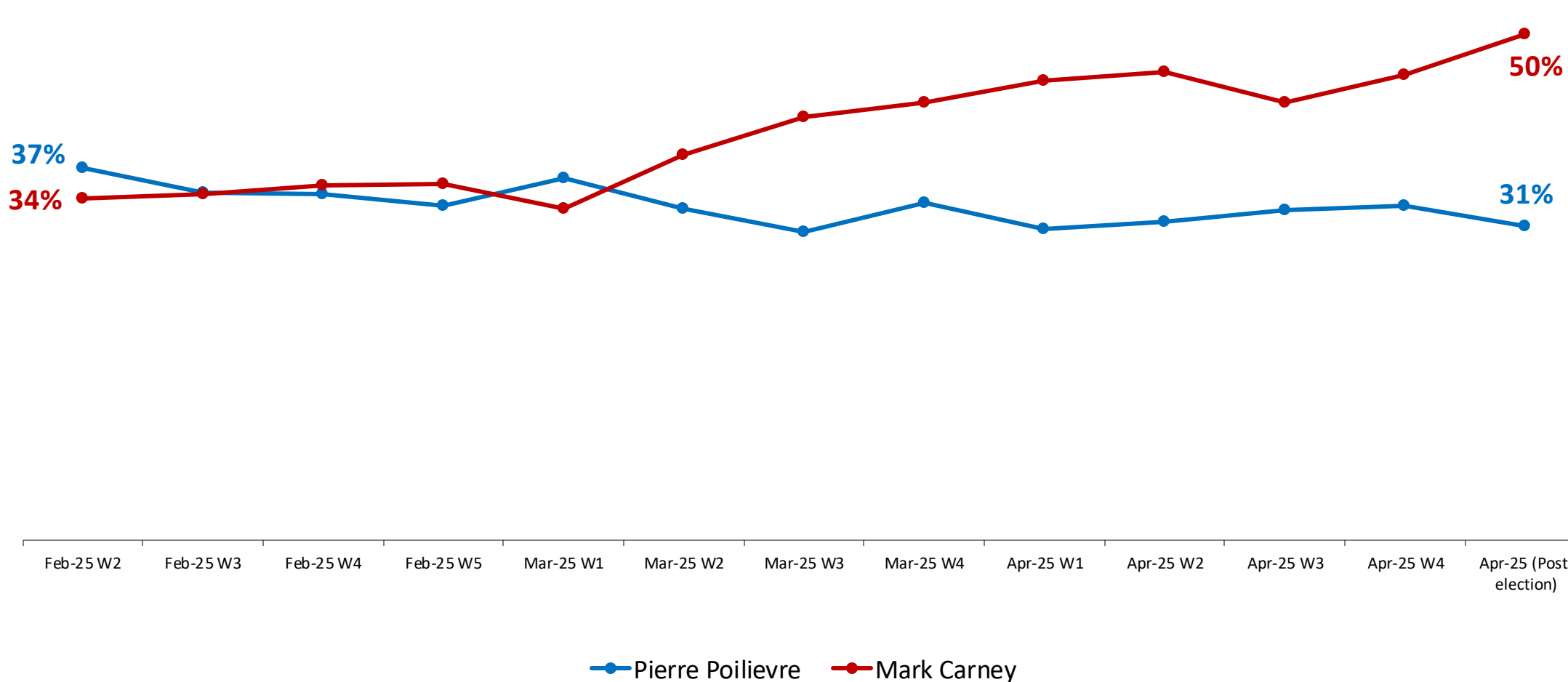
Best Leader for Canada-US Relations Tracking:

Carney 19-points ahead of Poilievre



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]



Mark Carney



Pierre Poilievre

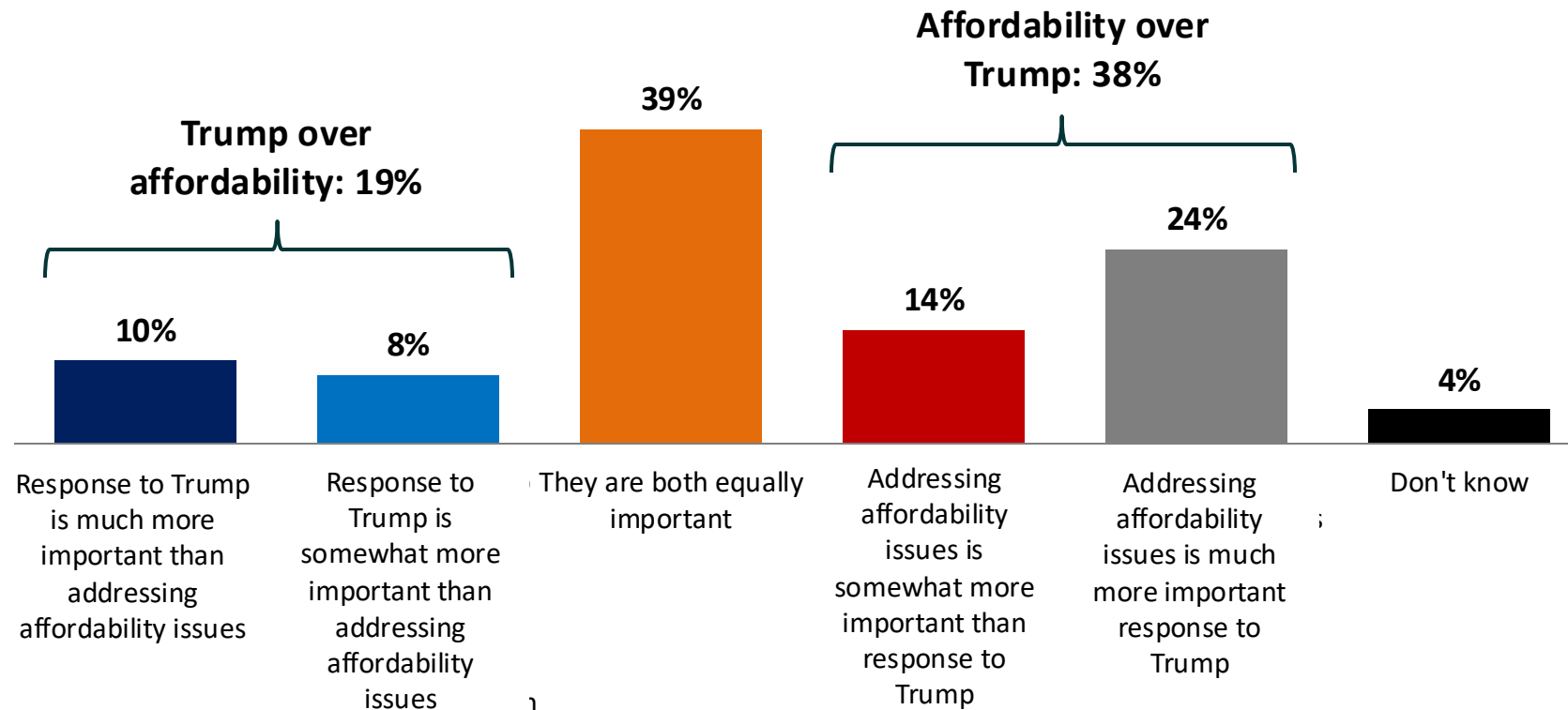
Voter Priorities: U.S. Relations vs. Affordability

Plurality (39%) see both equal; among the rest, those who prioritize affordability lead by 19 points

Q

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.

[asked of all respondents; n=2,000]



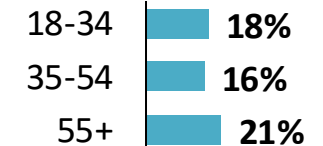
Segmentation

Respondents who say "Trump"

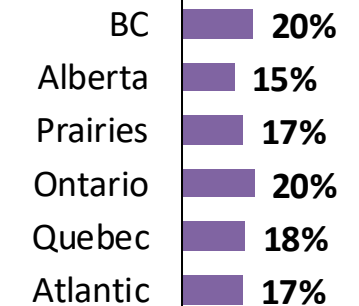
Gender



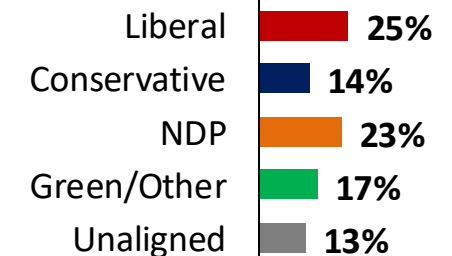
Age



Region



Party ID



Voter Priorities: U.S. Relations vs. Affordability

Majority of those who prioritize a response to Trump vote Liberal



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=1,696]

| Column % | Response to Trump is much more important than addressing affordability issues (N=197) | Response to Trump is somewhat more important than addressing affordability issues (N=157) | They are both equally important (N=676) | Addressing affordability issues is somewhat more important than response to Trump (N=238) | Addressing affordability issues is much more important than response to Trump (N=397) |
|--------------|---|---|---|---|---|
| Conservative | 23% | 25% | 33% | 54% | 59% |
| Liberal | 62% | 64% | 49% | 33% | 26% |
| NDP | 6% | 5% | 8% | 6% | 6% |
| Bloc | 6% | 3% | 8% | 4% | 6% |
| Green | 1% | 1% | 2% | 2% | 1% |
| PPC | 1% | 0% | 1% | 1% | 1% |
| Other | 1% | 1% | 1% | 1% | 0% |

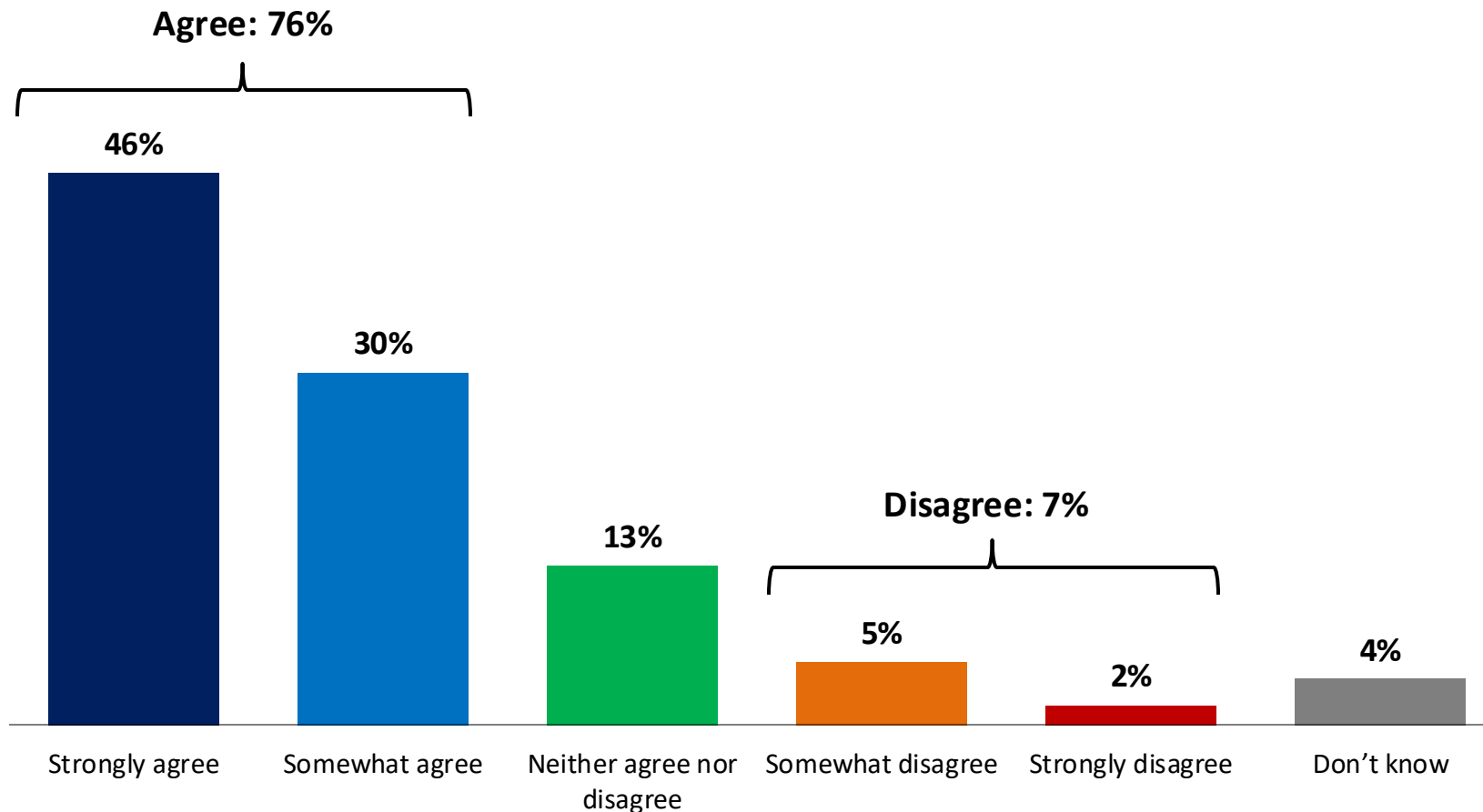
A Mandate for Change

Canadians are looking for change

Q

Thinking about whether the new Carney government should be similar or different to the previous Trudeau-led government, please indicate if you agree or disagree with the following statement:
Carney needs to enact very different policies from Trudeau for Canada to be successful.

[asked of all respondents; W1 n=1,000]



Segmentation

Respondents who say "Agree"

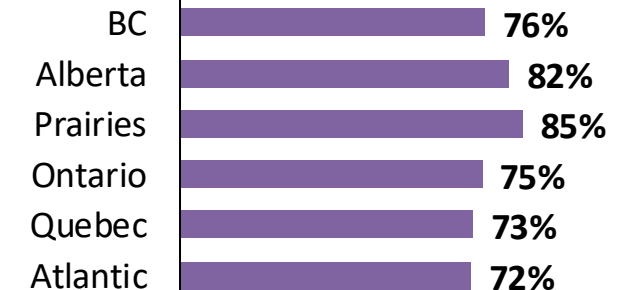
Gender



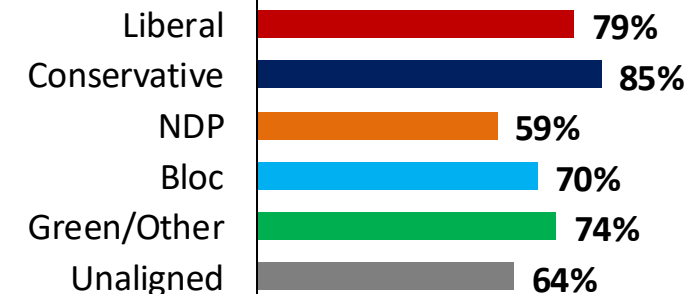
Age



Region



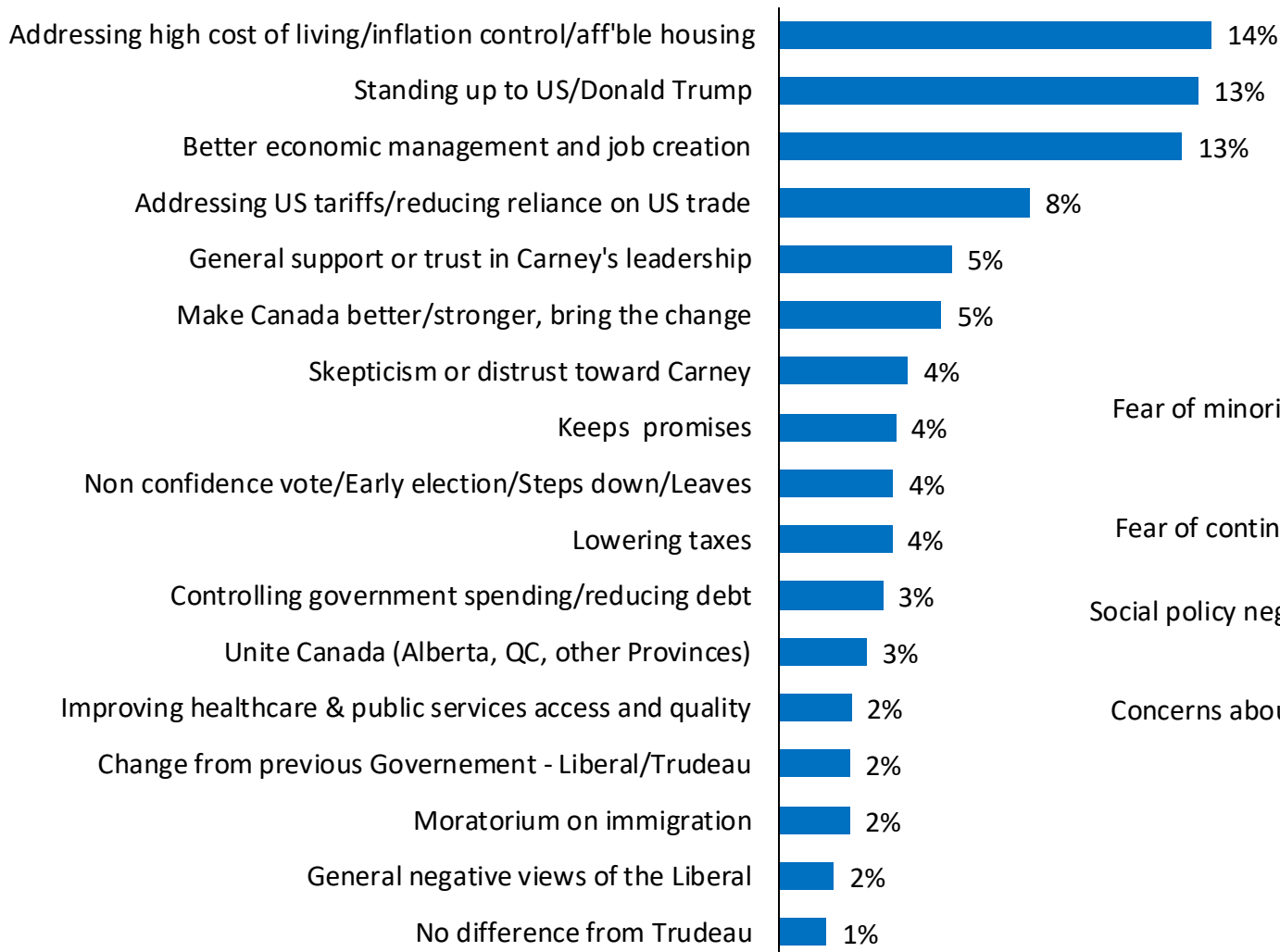
Party ID



Canadians want a stronger economy that delivers a better, more affordable standard of living



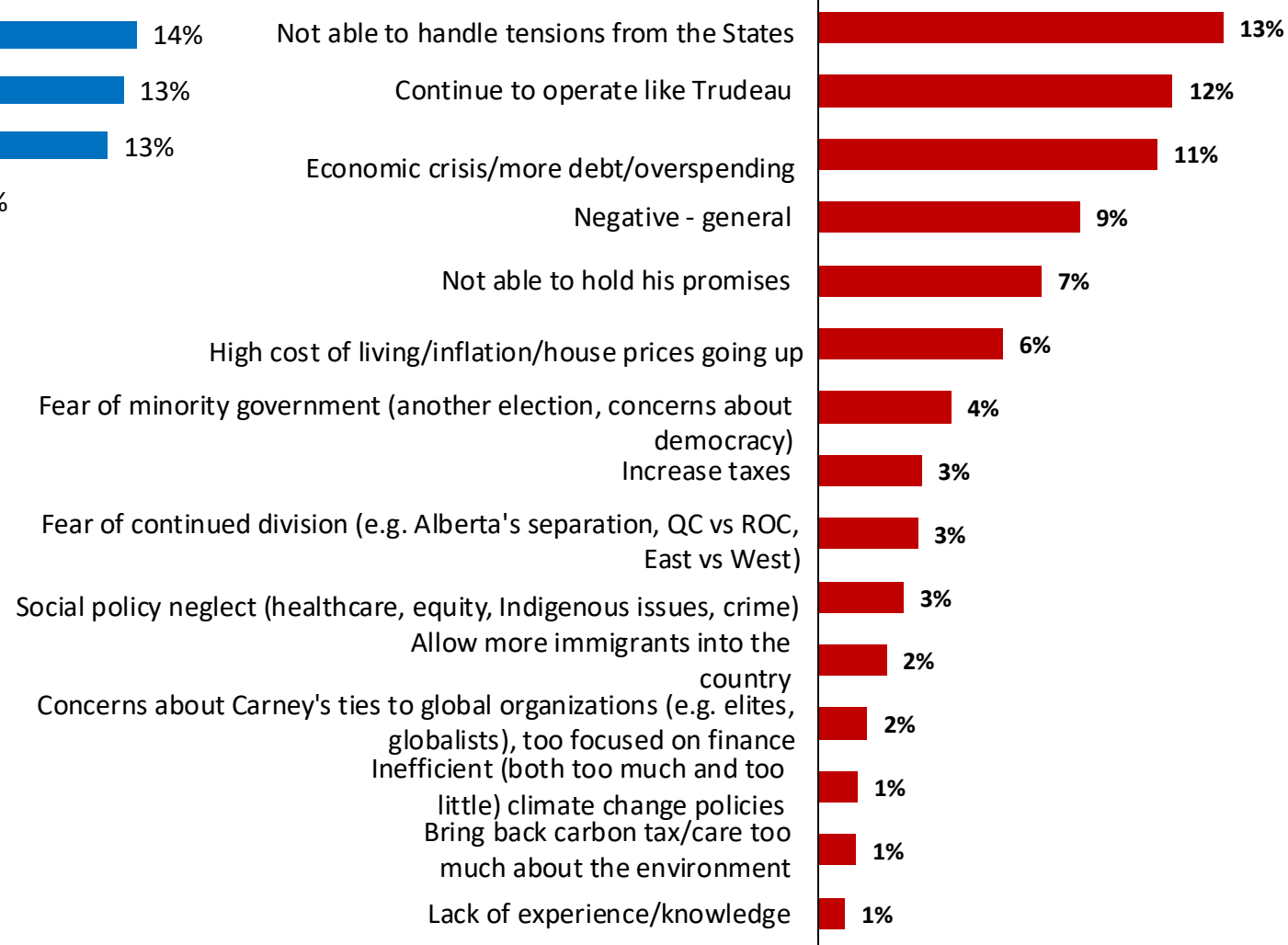
What is your greatest **hope** for Prime Minister Mark Carney and the newly elected Liberal government?[OPEN ENDED] [n=1,000]



Note: 'Other' (6%), None (2%), DK (3%), 'Refused' (<1%) and 'Bad Respondent' (<1%) not shown.



What is your greatest **fear** about Prime Minister Mark Carney and the newly elected Liberal government?[OPEN-ENDED] [n=1,000]

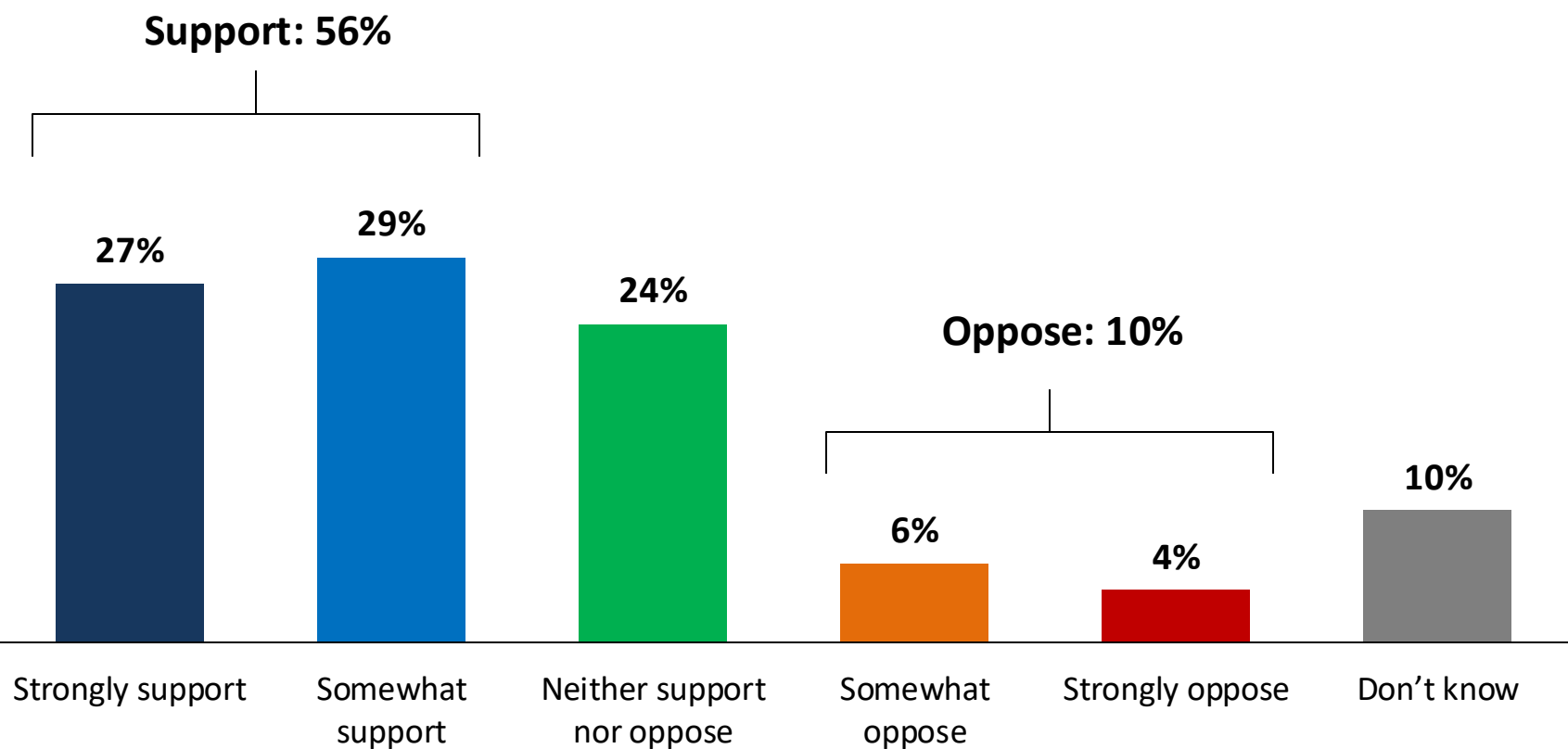


Note: : 'Other' (5%), None (10%), DK (5%), 'Refused' (<1%), 'Bad Respondent' (<1%) not shown.

A Different Kind of PM

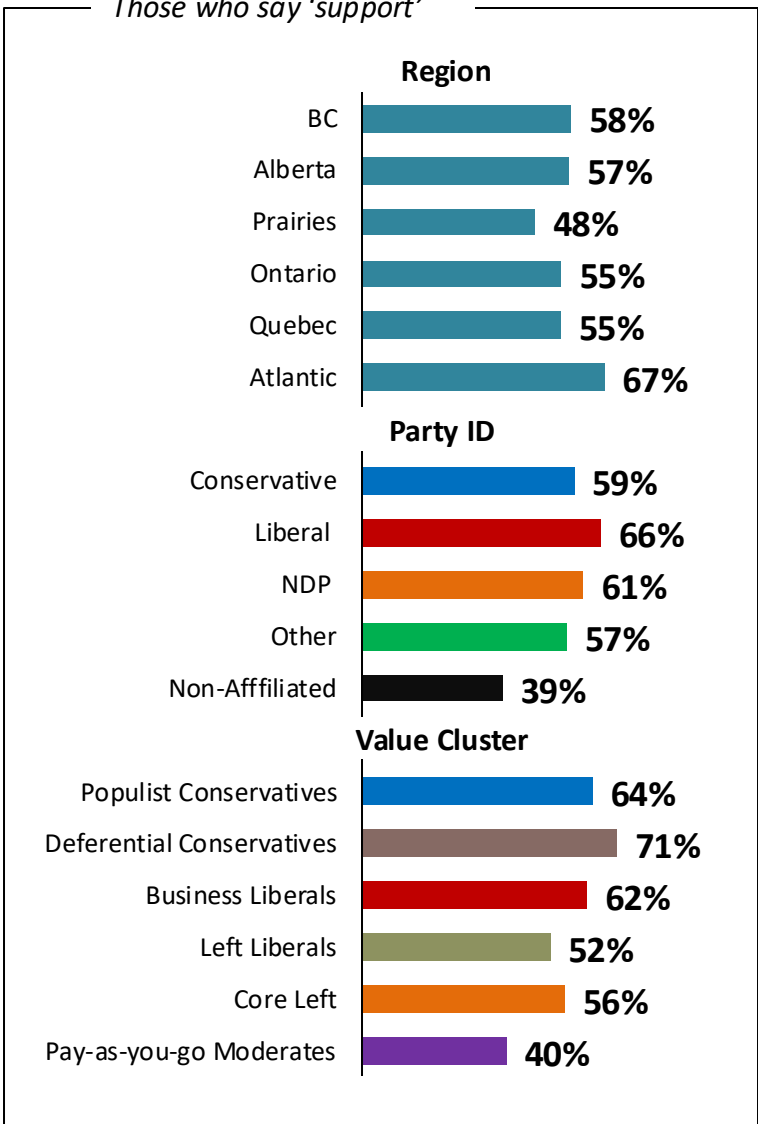
While most Canadians (56%) support the notion of Canada living up to its commitment as a member of NATO³²

Q For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:
Doing more to live up to Canada's commitments as a member of NATO
[asked of all respondents; Nov. '2024 n=1,000]



Segmentation

Those who say 'support'

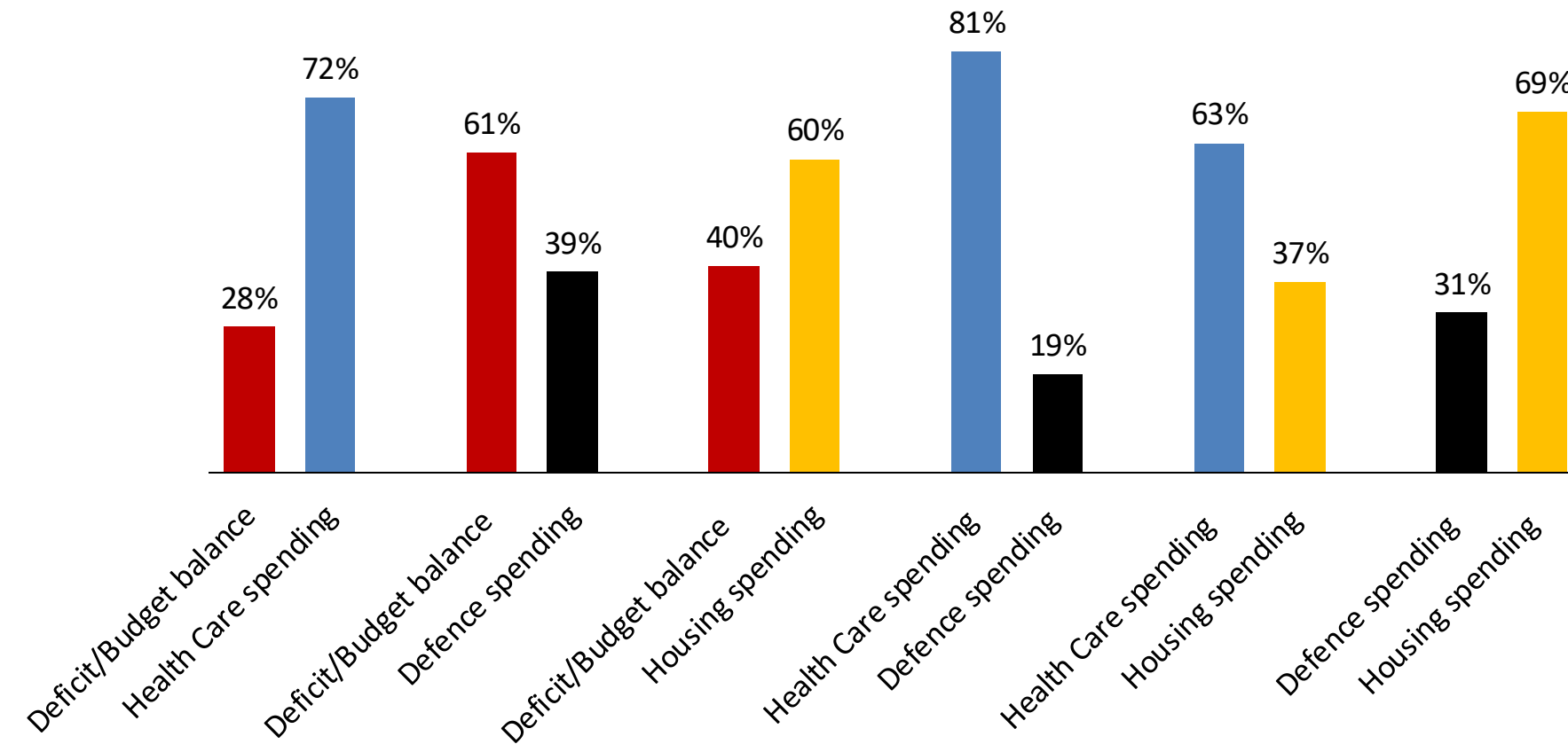


They are not willing to pay for it when faced with other priorities



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

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



| Spending | # of wins out of total |
|------------------------|------------------------|
| Health Care | 3/3 |
| Housing | 2/3 |
| Deficit/Budget Balance | 1/3 |
| Defence | 0/3 |

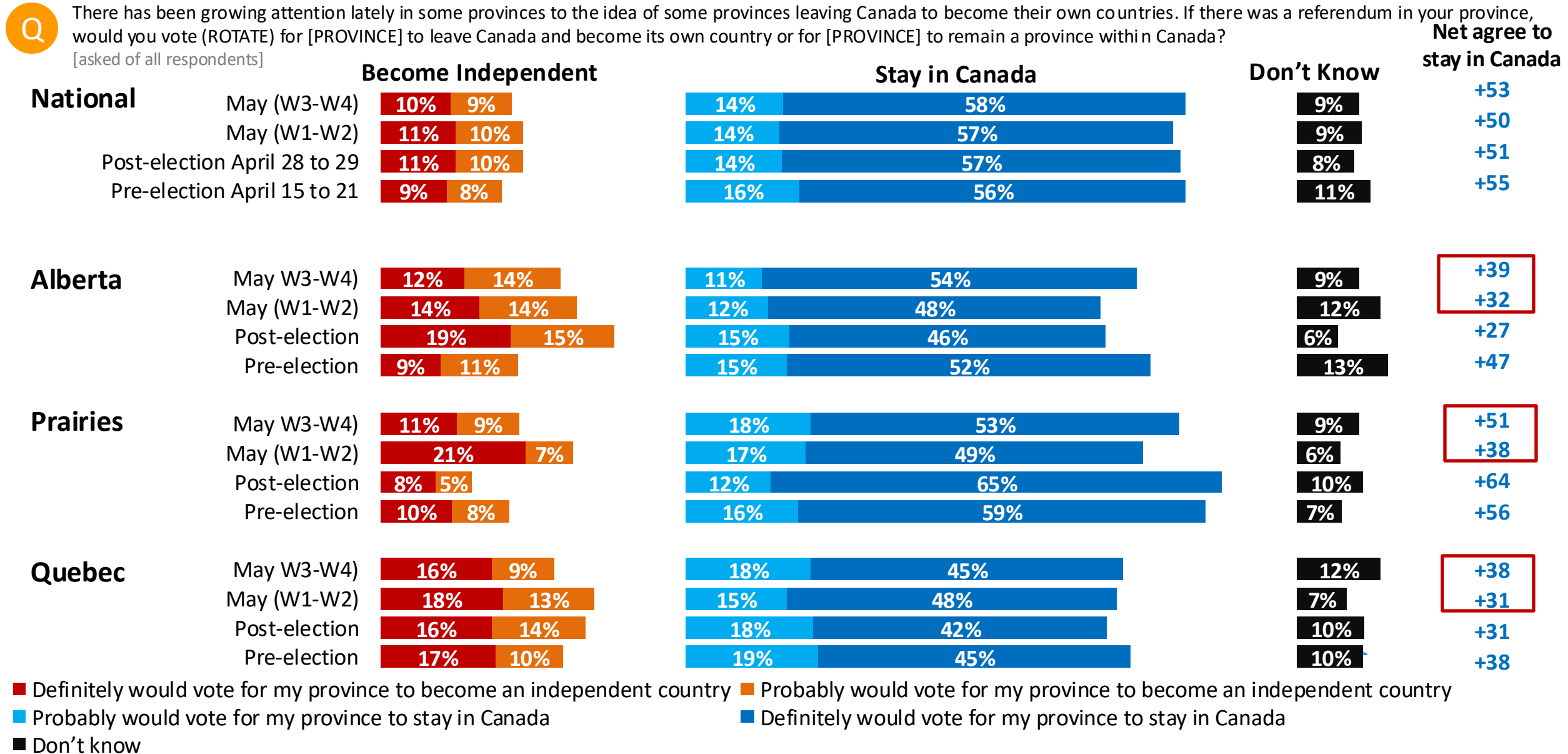
Carney Getting Early Good Marks

35

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]



Support for Separatism Easing since Election

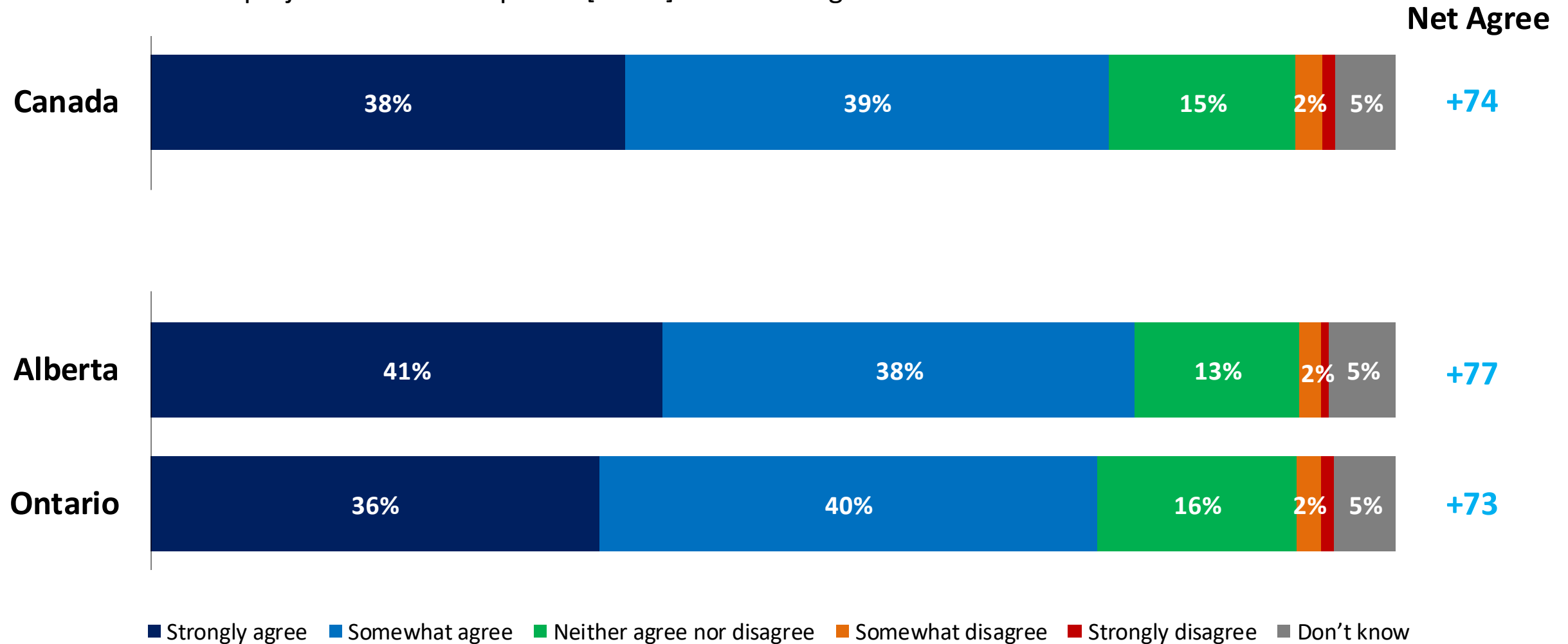


Build Baby Build

Now is the time for infrastructure



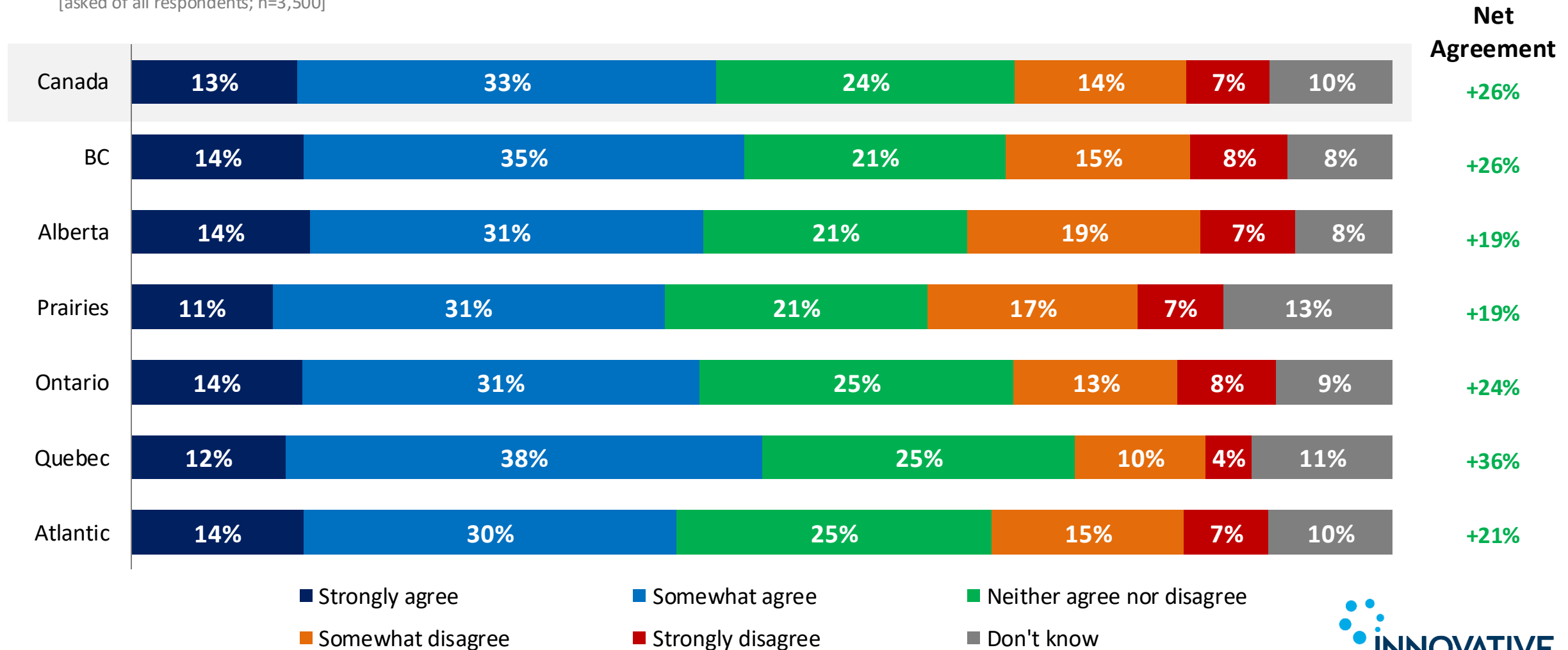
To what extent do you agree or disagree with the following statements? - Now is a good time to focus on infrastructure projects that can help with [PROV]'s economic growth.



But ... early warning signs

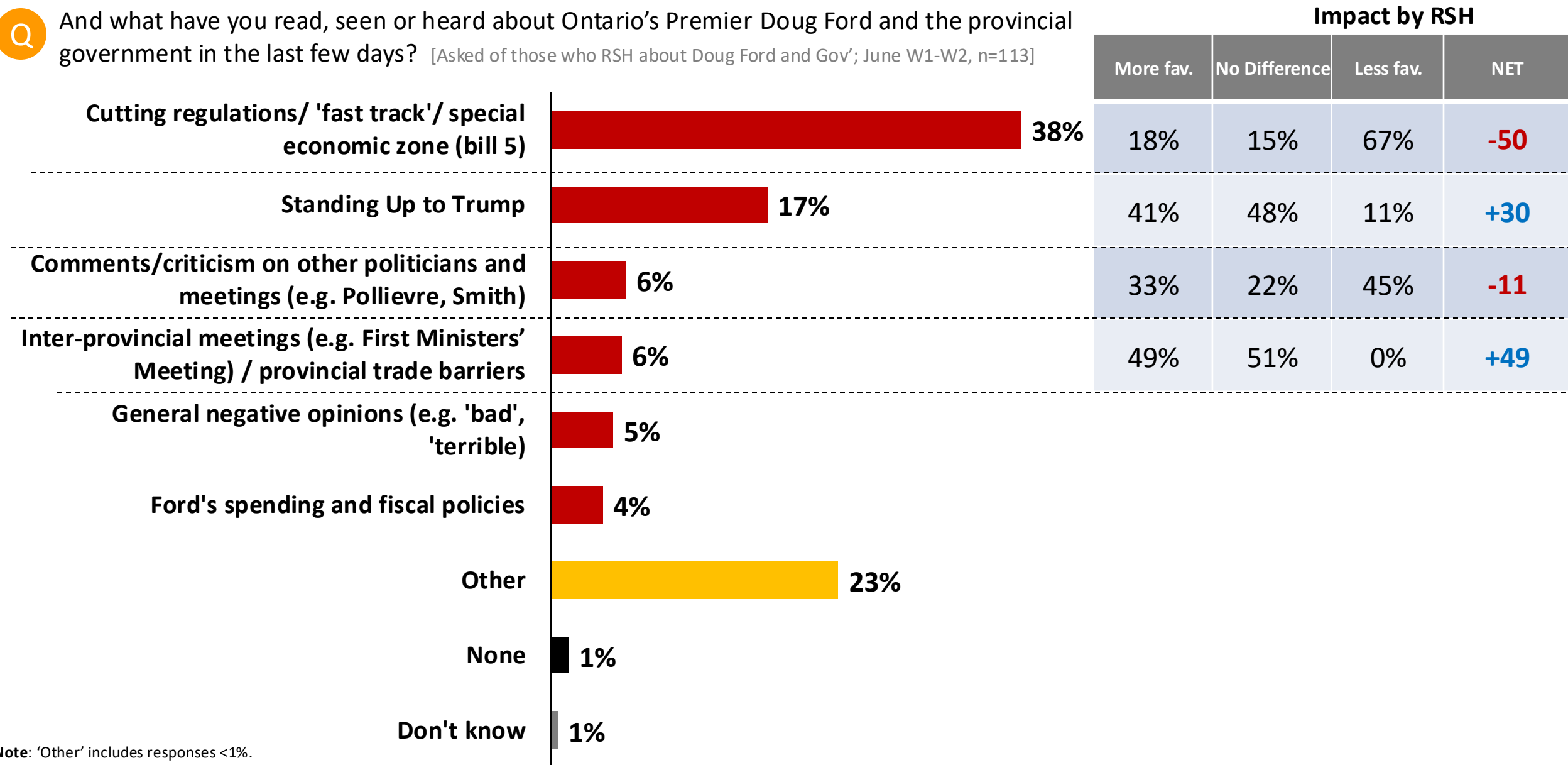
Projects Getting Built by Region: Atlantic slightly below average

Q Thinking of the regulatory organizations that approve the types of projects that we have mentioned in this survey, do you agree with the following statements: ***Projects that are important for the economy are getting built BY REGION***
[asked of all respondents; n=3,500]



Mentions of fast track bill drives negative impact in Ontario public debate

Q And what have you read, seen or heard about Ontario’s Premier Doug Ford and the provincial government in the last few days? [Asked of those who RSH about Doug Ford and Gov’; June W1-W2, n=113]



Note: 'Other' includes responses <1%.

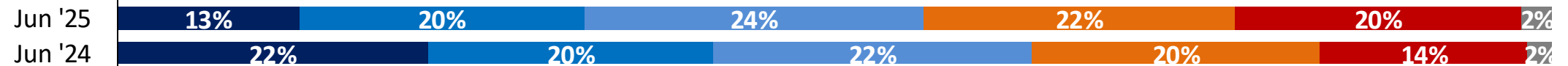
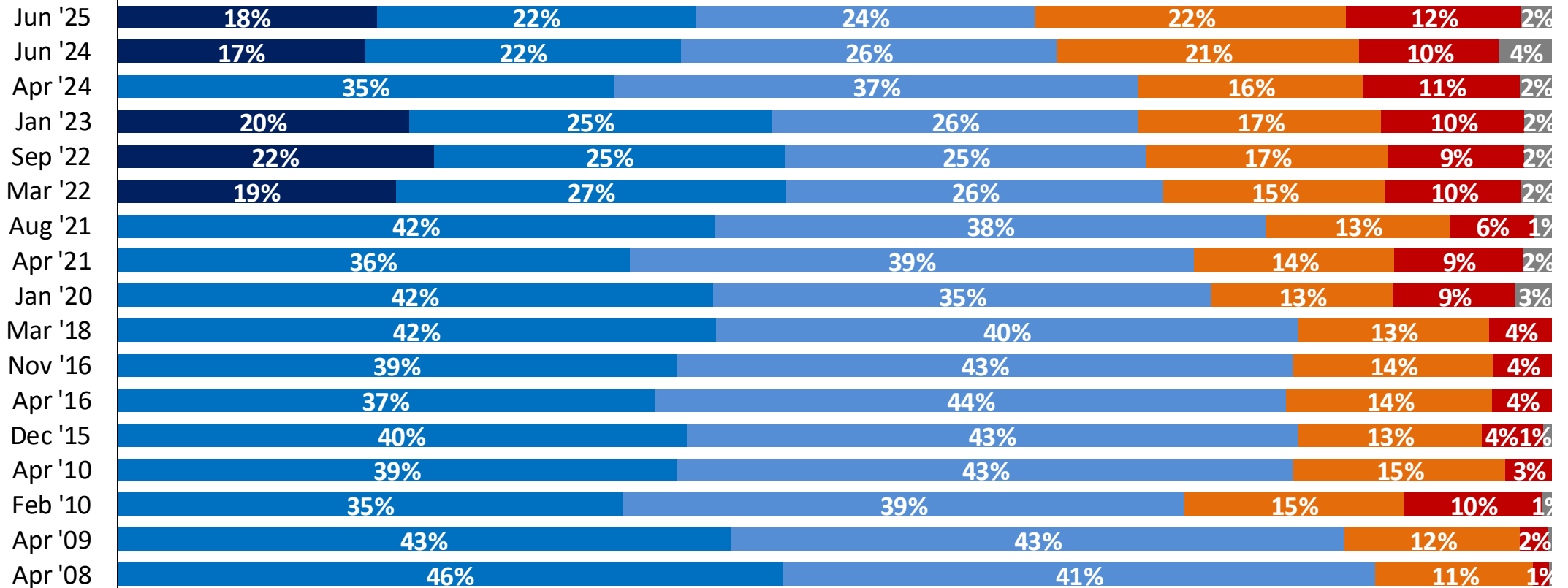
Feelings Towards Energy Transition

Concern with Climate Change: Share of those at least somewhat concerned drops 7 points for Canadians and drops 8 points for Americans



How concerned are you about climate change?

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



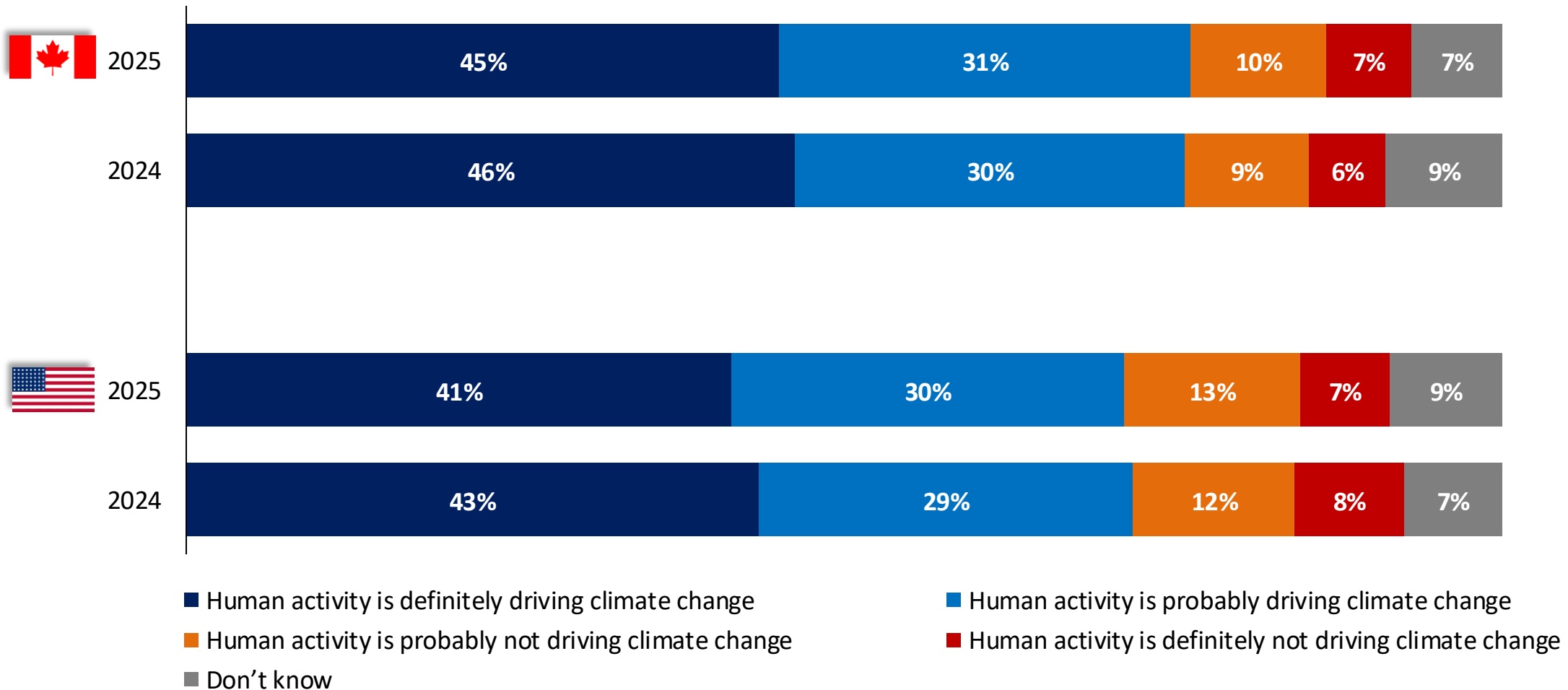
■ Extremely concerned ■ Very concerned ■ Somewhat concerned ■ Not very/A little bit concerned ■ Not concerned at all ■ Don't know

NOTE: For tracking in Canada, prior to 2010, the term "global warming" was used in place of "climate change." Prior to 2024, results only show who believe climate change is occurring. 'Extremely concerned' was recently added in March 2022.

Climate Change: Share of Canadians and Americans who believe that human activity is the cause of climate change remains stable

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

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

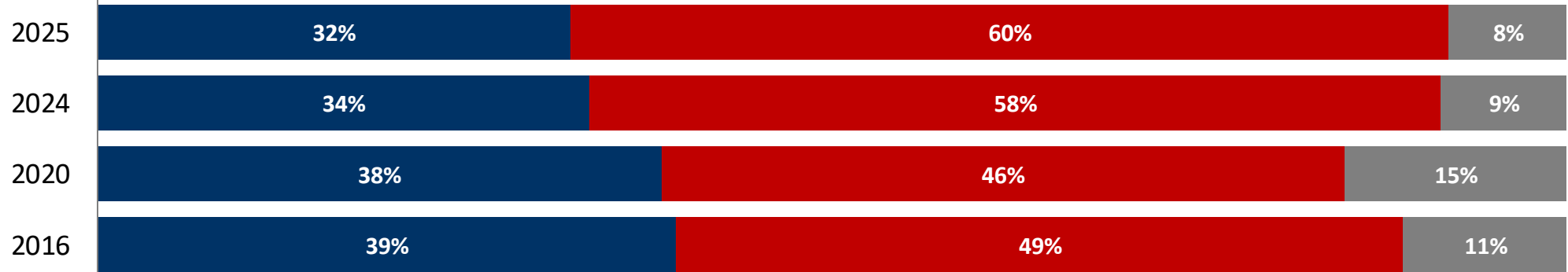
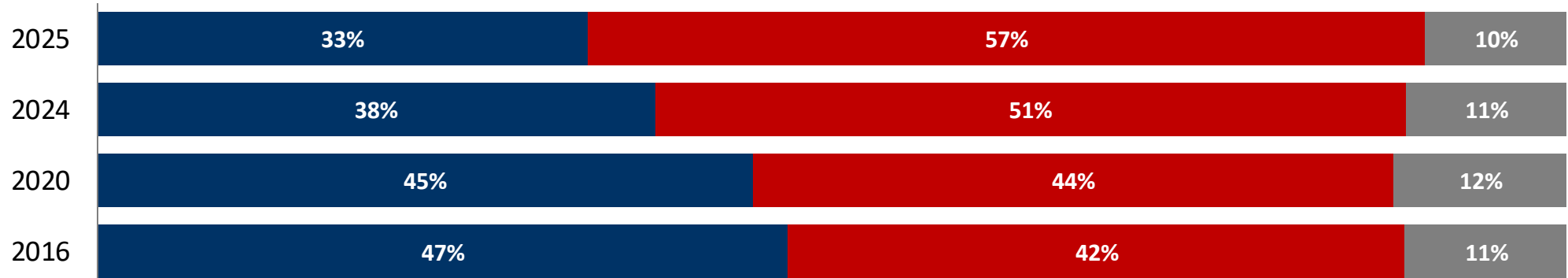


Environment: Share of Canadians prioritizing the economy up 6 points; American trend remains stable since last year



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=1,000]



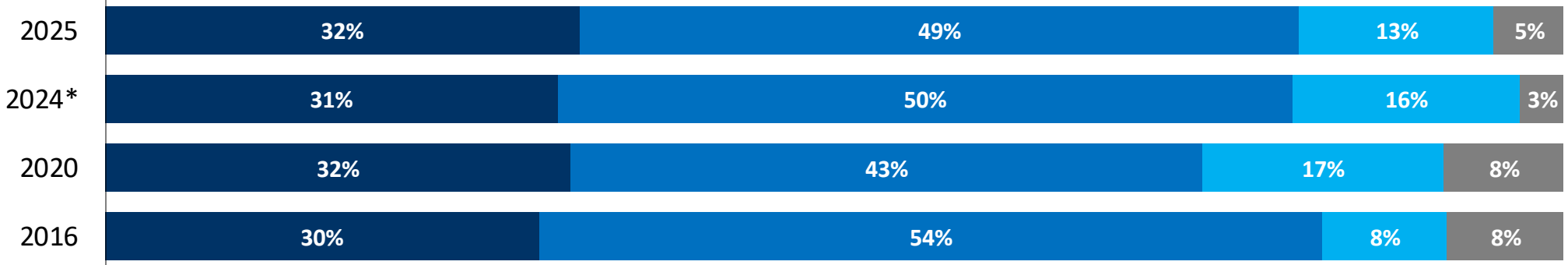
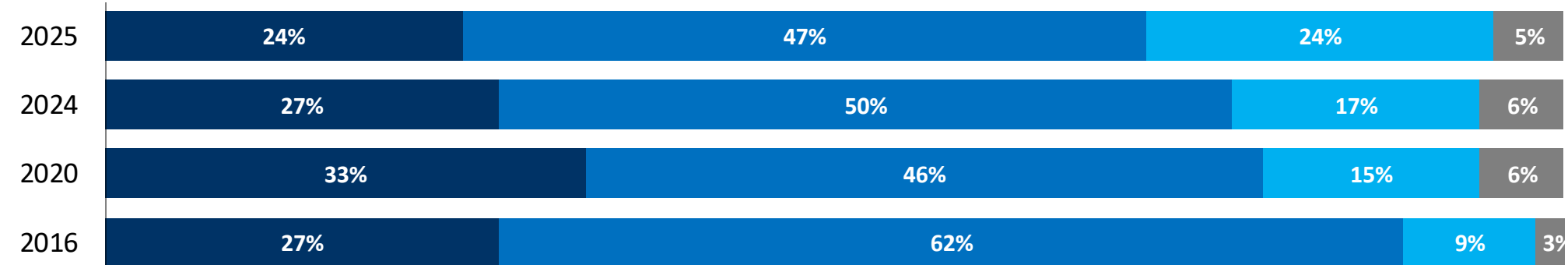
■ The environment ■ The economy ■ Don't know

Environment: More Canadians say “we are doing enough for the environment” while share of Americans saying so decreased in 2025



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

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



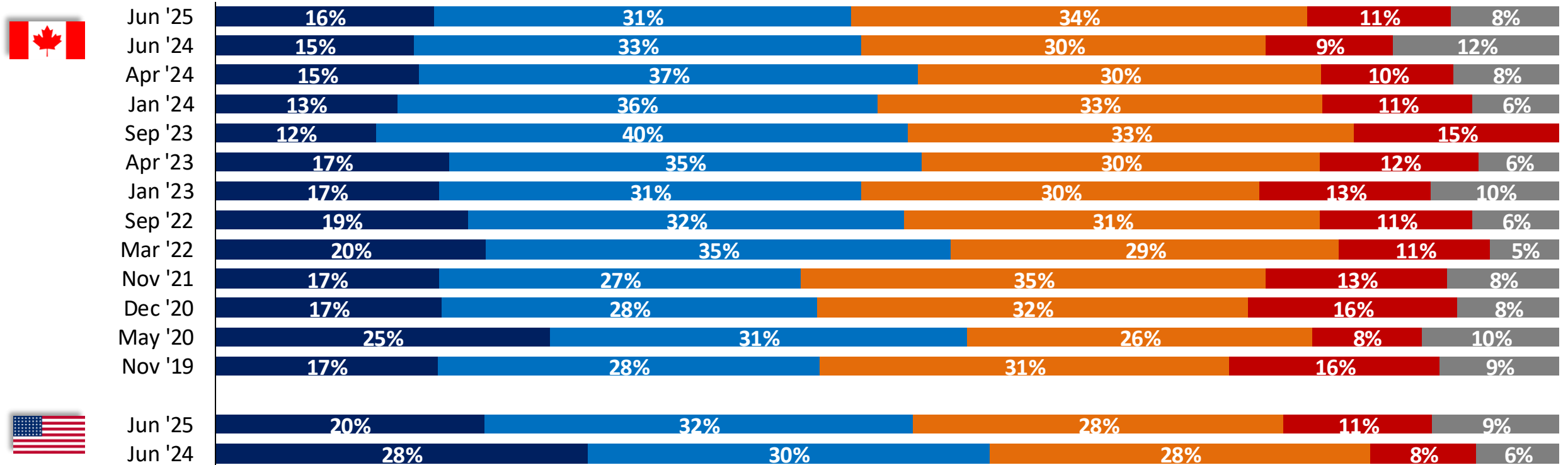
- We need to take immediate and dramatic action now to stop damaging the environment before it is too late.
- We need to pay more attention to the environment, but we should be careful not to rush into policies that may cause more harm than good.
- I think we are already doing enough for the environment.
- Don't know

Energy Transition Familiarity: Familiarity with energy transition is stable for Canadians while familiarity drops 6 points for Americans

Q 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=1,000]



- I understand the details and can explain them to others
- I am familiar with the idea of an energy transition but cannot explain it to others
- I have heard of the idea of an energy transition but I don't know the details
- I have not heard about the idea of an energy transition before this survey
- Don't know

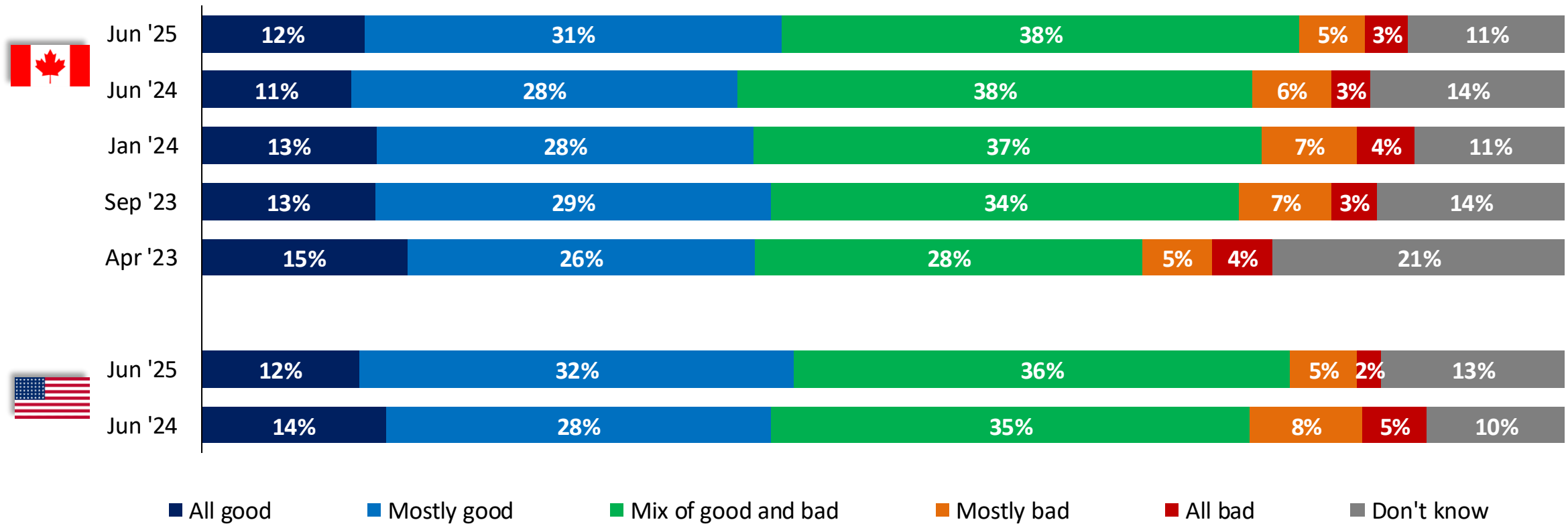
NOTE: "Don't know" was not included as an option when asked in September 2023. In addition, wording for two response options are slightly different from November 2019 to April 2023 i.e. "Very familiar and can explain it to others in detail" was "I understand the details and can explain them to others"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

Energy Transition Impression: 43% of Canadians and Americans say ET sounds like a good thing, 4-point jump for Canadians compared to 2024



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=1,000]



Exploring Energy Transition Attitudes

However, for most people, the issue of an energy transition away from fossil fuels is complex. Some Canadians and Americans agree with positions from both sides of the debate. In this survey, we asked respondents to agree or disagree with three oil-friendly statements, two transition-friendly statements and two neutral statements.

| Pro-Oil Statements | Pro-Transition Statements |
|--|--|
| It is critical to [COUNTRY] 's ongoing prosperity that we responsibly develop and export our oil and gas resources. | 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. |
| [COUNTRY] is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources. | 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. |
| 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. | |
| Neutral Statements | |
| It is important to me that [COUNTRY] is self-sufficient in energy. | I don't care where we get energy from so long as it is at the lowest price. |

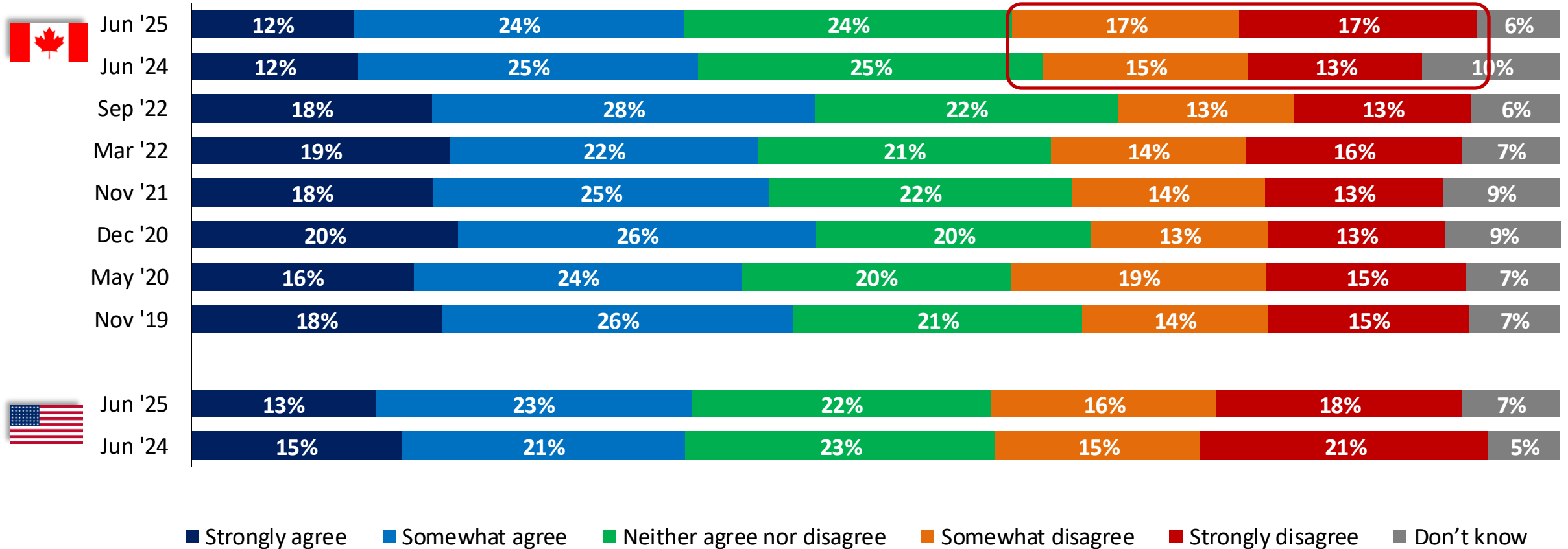
Pro-Energy Transition: 37% of US and 36% of CA agree on phasing out fossil fuels; 34% disagree, with Canadian disagreement up 6 points



Do you agree or disagree with the following statements?

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

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.



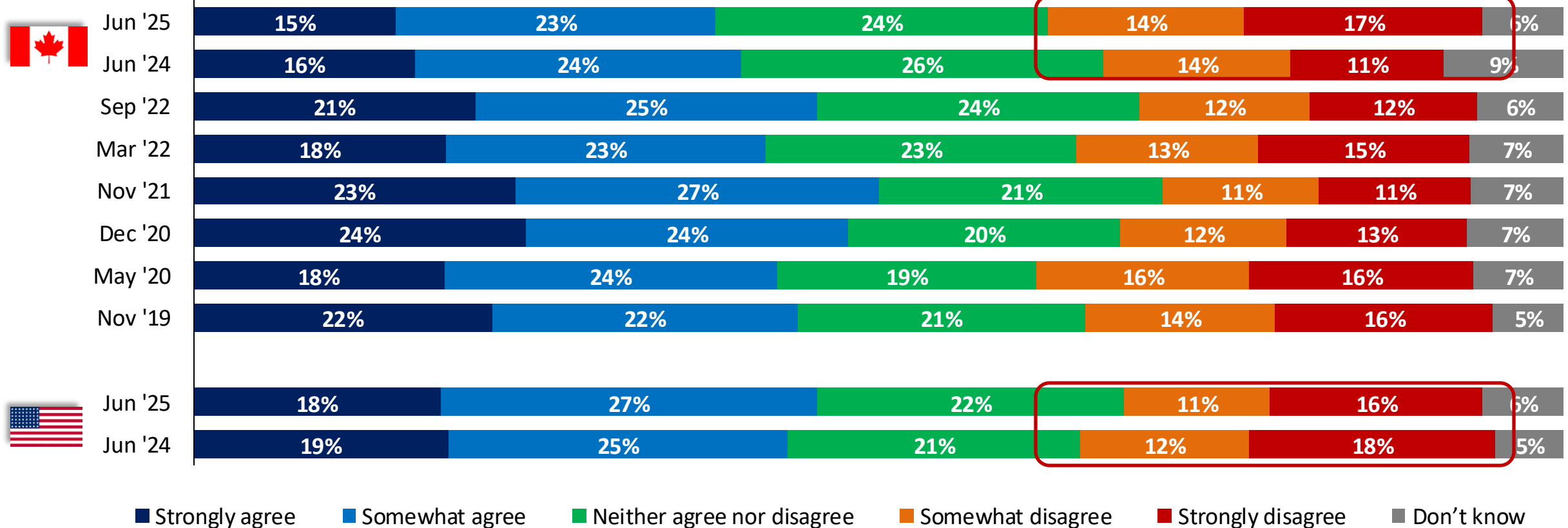
Pro-Energy Transition: Agree/disagree gap in Canada increases toward disagreement, while US gap narrows toward agreement



Do you agree or disagree with the following statements?

[asked of all respondents; Canada n=1,500; United States n=,1000]

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.



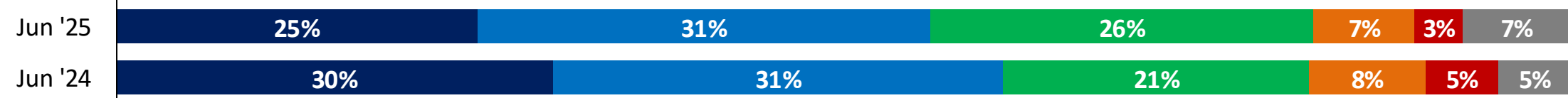
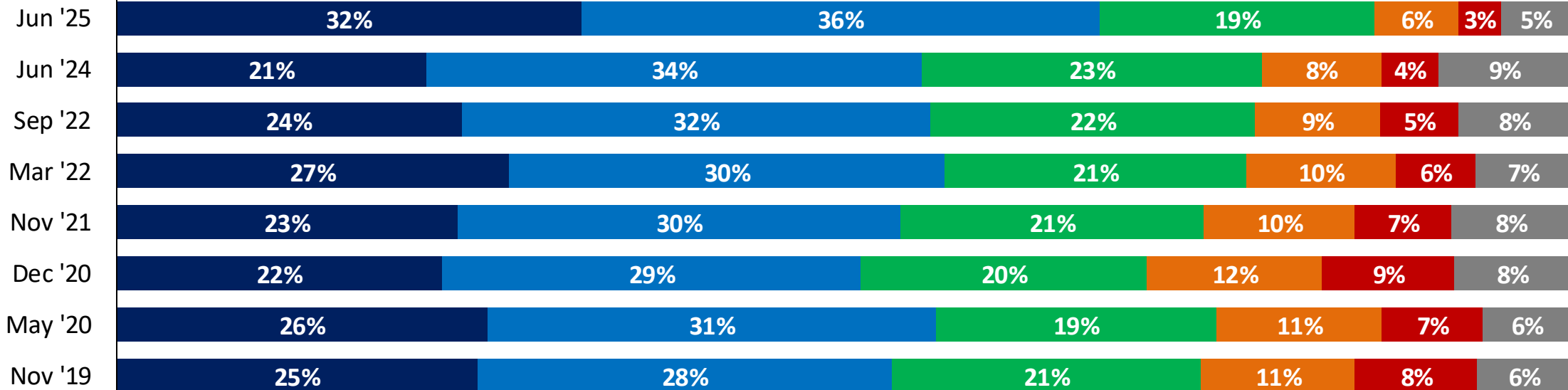
Pro-Oil: 68% of Canadians agree with responsibly developing oil and gas,⁵² 13-pt jump since 2024; strong agreement down 5 pts for Americans



Do you agree or disagree with the following statements?

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

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



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

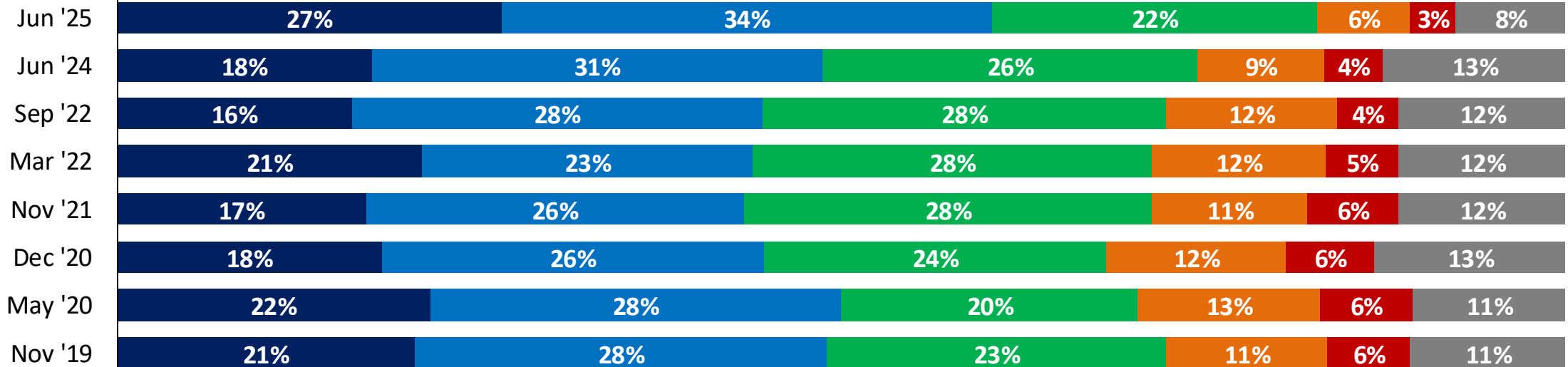
Pro-Oil: Canada sees an 11-pt jump while America sees a 7-pt decline since 2024



Do you agree or disagree with the following statements?

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

[COUNTRY] is one of the most responsible countries in the world when it comes to how we develop and export our oil and gas resources



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

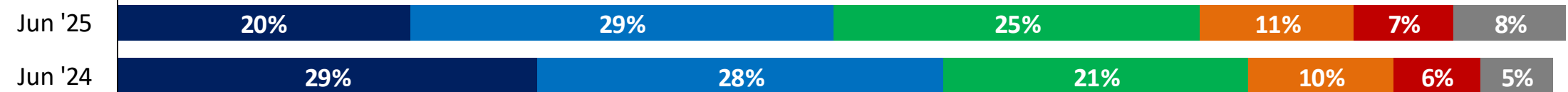
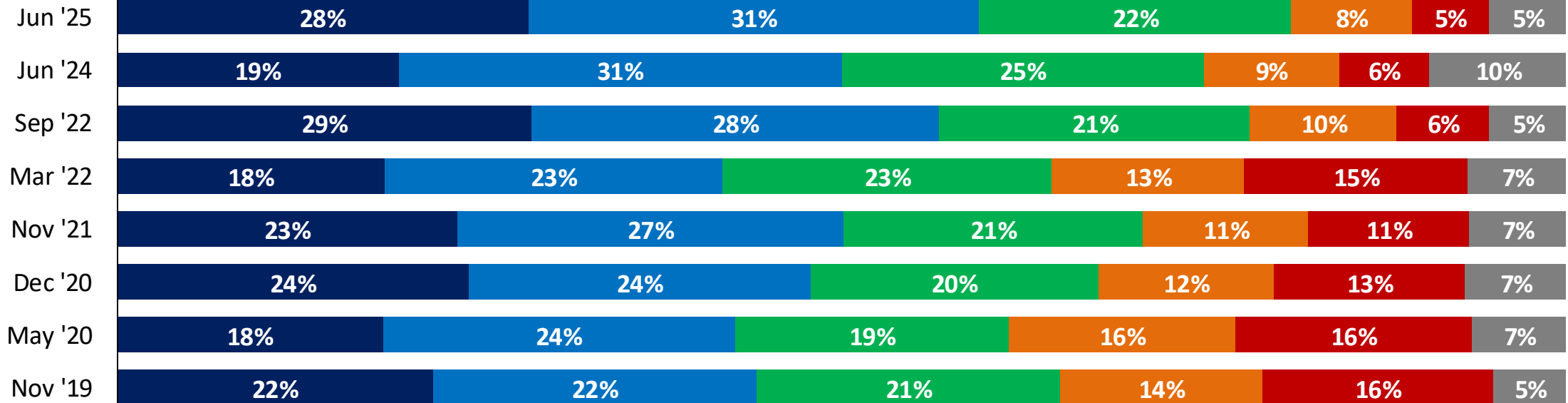
Pro-Oil: Agreement on 'it makes no sense to leave oil and gas in the ground' jumps 9 pts for Canada while decreasing 8 pts for Americans



Do you agree or disagree with the following statements?

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

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



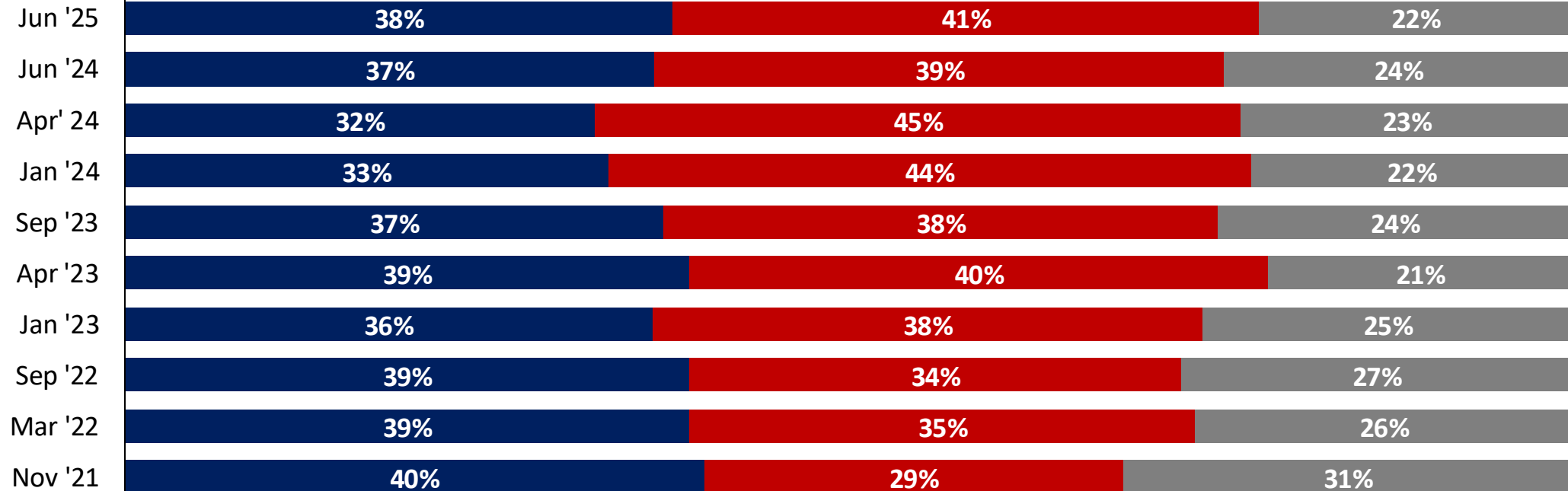
■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

Energy Transition: Share of Americans with negative views on energy transition fell by 6 points since 2024

Q

Based on what you know about an energy transition, which of the following statements is closest to your point of view?

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



- Government policies to accelerate the transition away from oil and gas show that Canada/United States is a leader on climate change and help make the world better for future generations.
- Government policies to accelerate the transition away from oil and gas risk increasing the cost of living and losing jobs in Canada/United States, and aren't likely to have a significant impact on climate change.
- Don't know

Energy Trade

Neutral Statements: Strong support for Canada to be self-sufficient in energy is up 11 points while dropping 8 points for America since 2024



Do you agree or disagree with the following statements?

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

It is important to me that [COUNTRY] is self-sufficient in energy



Jun '25

51%

32%

12%

3%

1%

2%

Jun '24

40%

36%

15%

2%

1%

6%



Jun '25

42%

32%

17%

3%

2%

2%

Jun '24

50%

34%

11%

2%

1%

2%

I don't care where we get energy from so long as it is at the lowest price



Jun '25

14%

21%

26%

22%

15%

3%

Jun '24

13%

22%

29%

19%

12%

6%



Jun '25

14%

23%

22%

20%

18%

4%

Jun '24

12%

22%

22%

23%

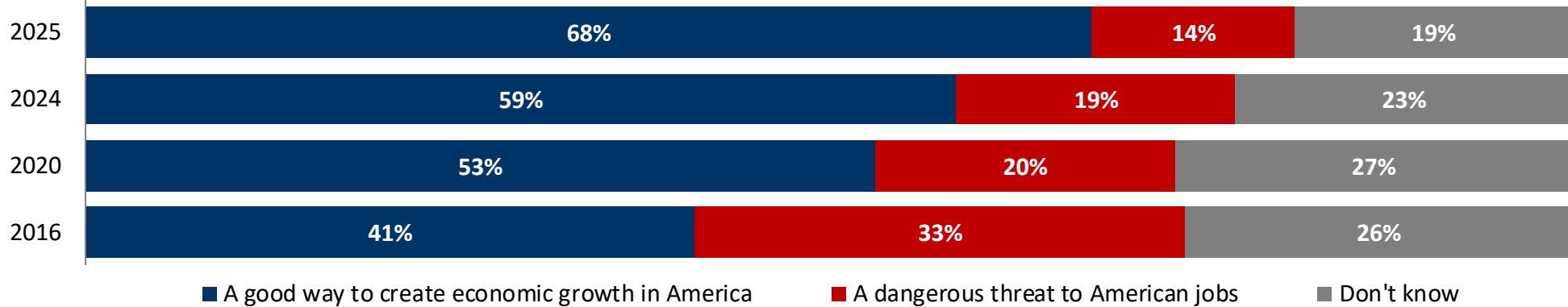
18%

3%

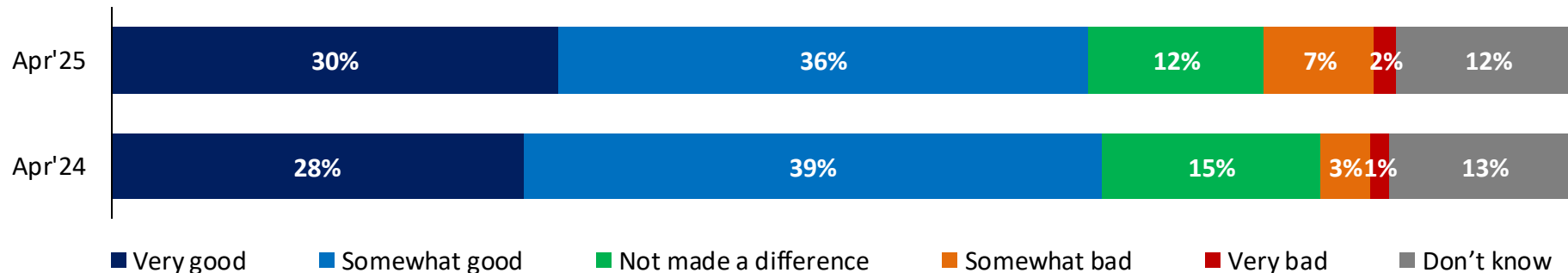
Strongly agree
Somewhat agree
Neither agree nor disagree
Somewhat disagree
Strongly disagree
Don't know

Free Trade: About 2-in-3 (68%) Americans believe FTAs are good for economic growth; 66% think free trade with Canada has been good

Q Which statement is closer to your point of view? **Free trade agreements are...**
[asked of all respondents; United States n=1,000]



Q The United States currently has a free trade agreement with Canada. **Do you think free trade with Canada has generally been a good thing for America or a bad thing for America?**
[asked of all respondents; United States n=1,000]

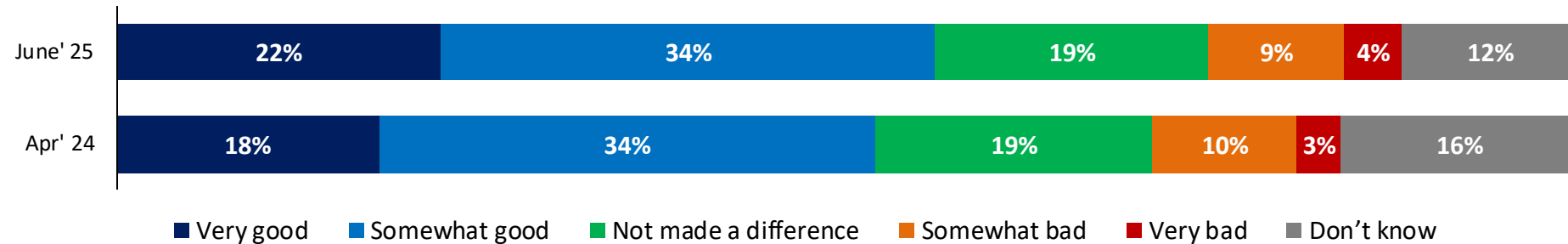


Free Trade: Over half of Americans think importing electricity and oil from Canada is a good thing for the US; 4-point increase from Apr'24

Q

The United States currently imports electricity from Canada. ***Do you think importing electricity from Canada has generally been a good thing for America or a bad thing for America?***

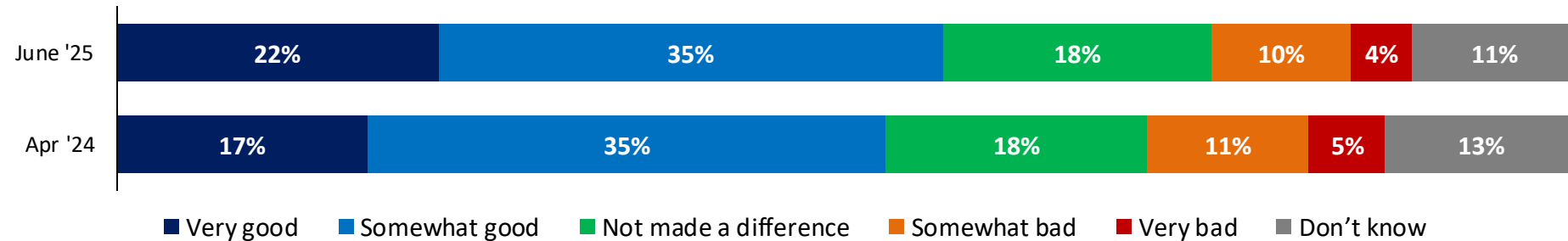
[asked of all respondents; United States n=1,000]



Q

The United States currently imports oil from Canada. ***Do you think importing oil from Canada has generally been a good thing for America or a bad thing for America?***

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



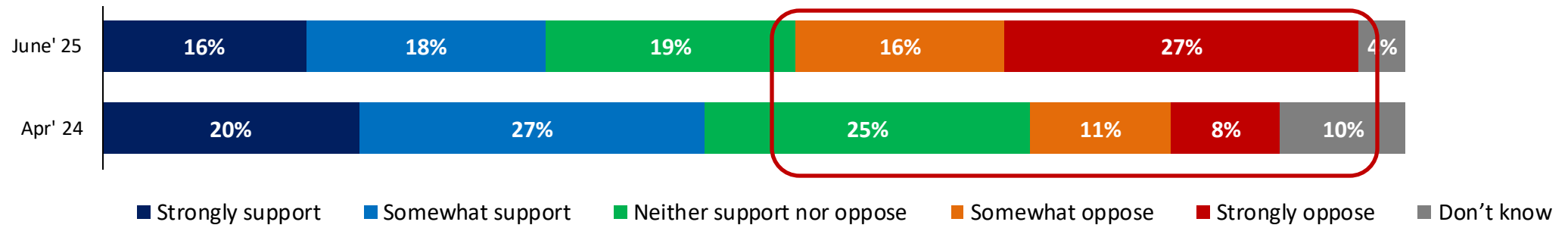
Free Trade: Strong opposition to a 10% tariff increase on foreign and Canadian imports has nearly or fully tripled since April 2024

Q

Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

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

Raise tariffs on all foreign imports by 10% across the board

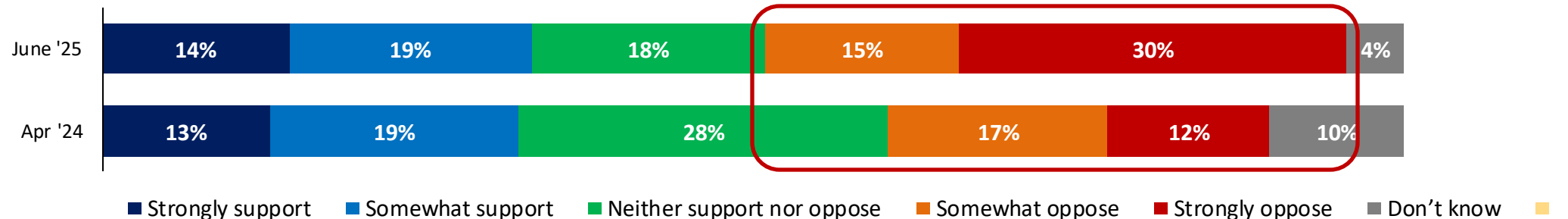


Q

Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

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

Raise tariffs on imports from Canada by 10% across the board

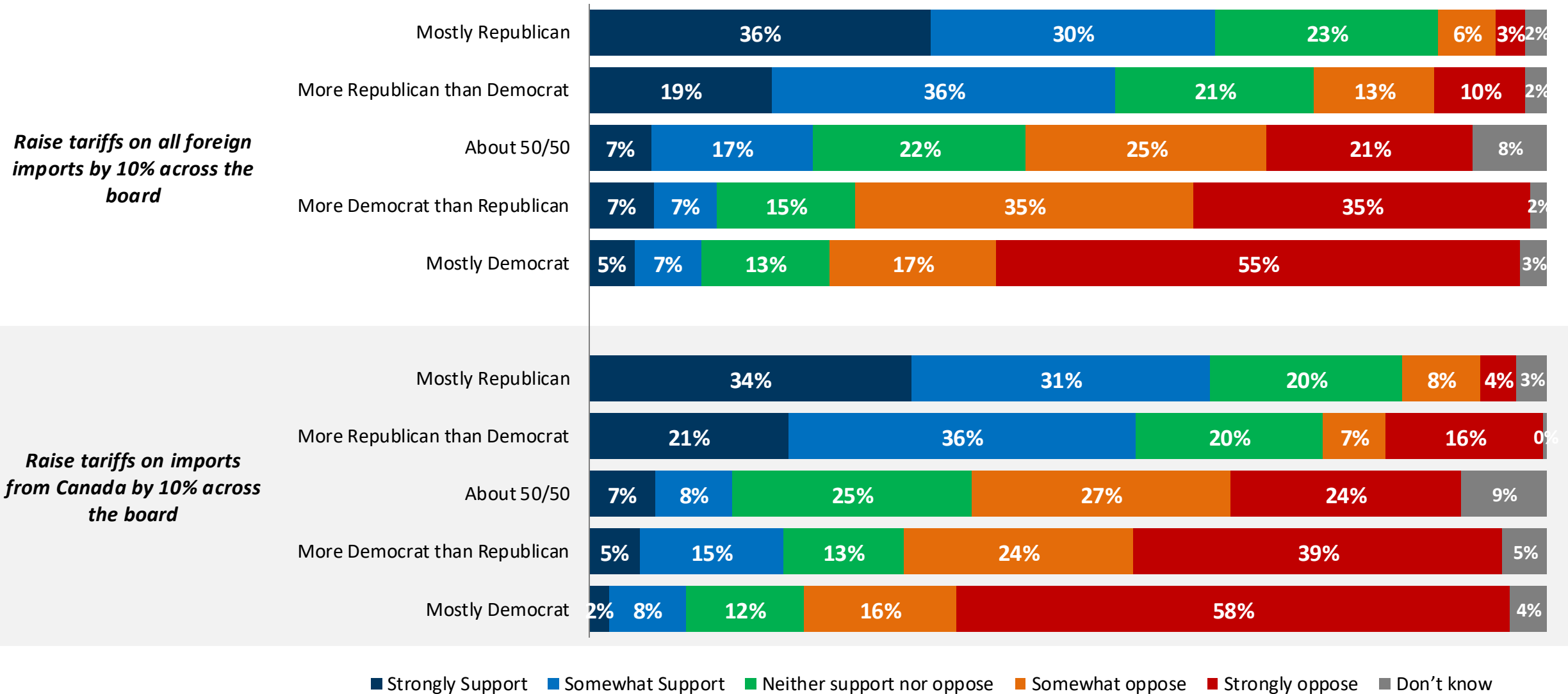


Trade Policies BY Voting Habits: More Republican voters support than oppose a 10% tariff on imports from Canada; most Democrats oppose



Below is a list of policies the federal government could adopt. For each policy, please indicate if you support or oppose that.

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



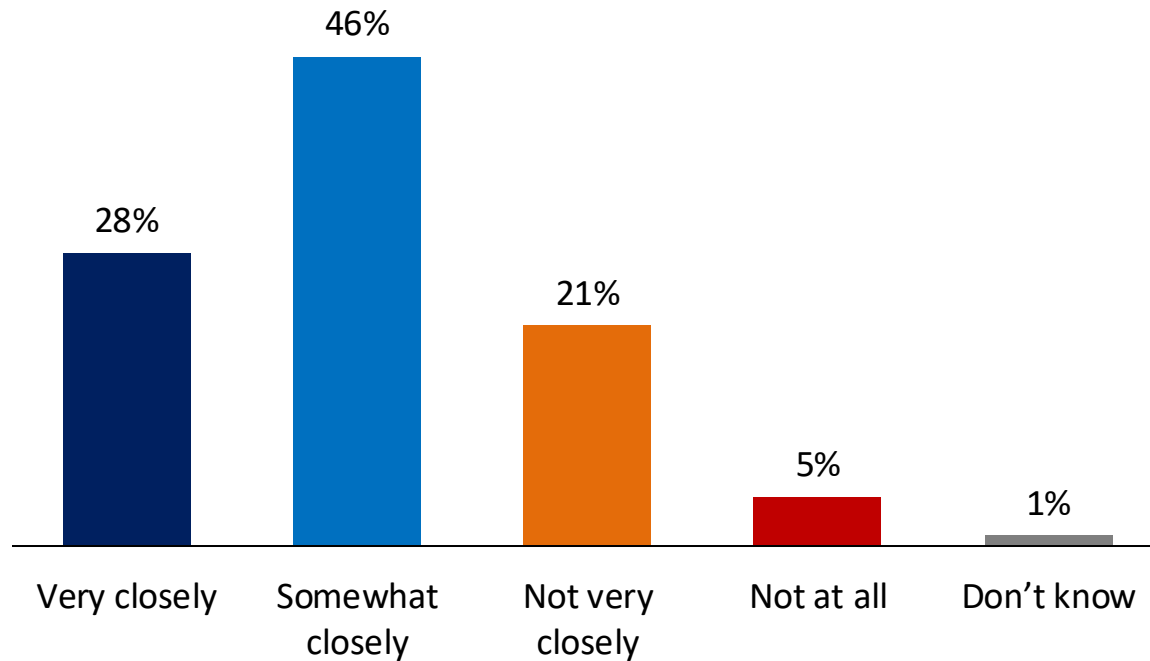
US Tariff Reactions

Federal Read, Seen, Heard: 73% of Americans have closely follow the news about tariff policies; 37% have a very negative reaction to them



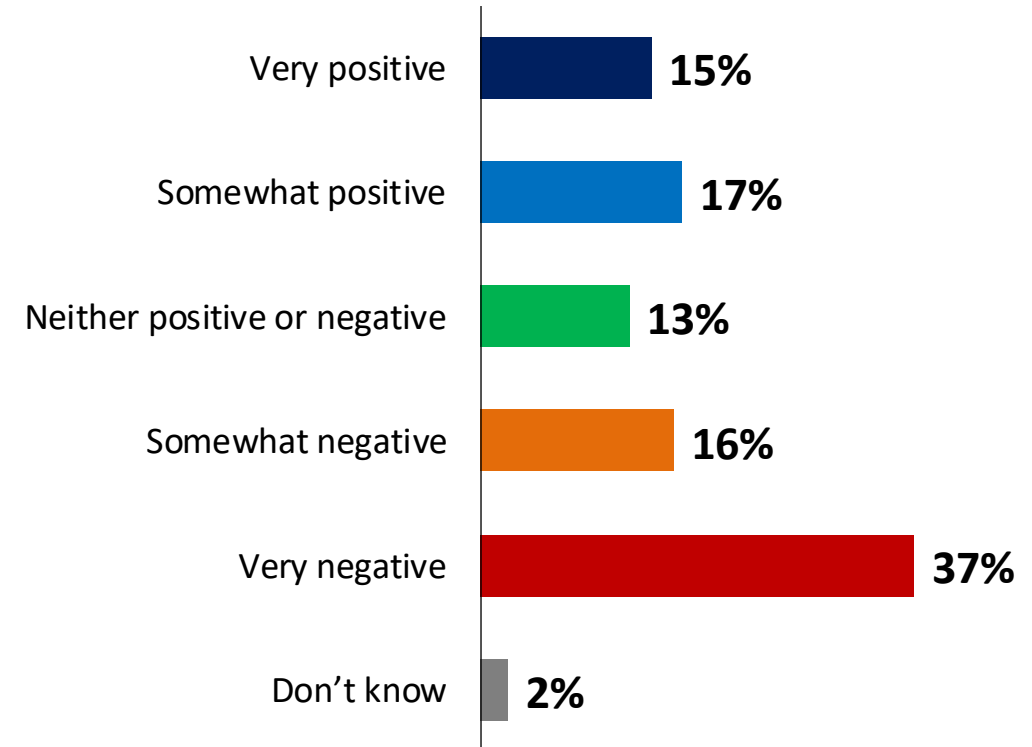
How closely are you following the news about President Trump's tariff policies?

[Asked of all respondents; United States n=1,000]



From what you have read, seen or heard, do you have a positive or negative reaction to President Trump's tariff policies?

[Asked of those who have RSH; United States n=1,000]

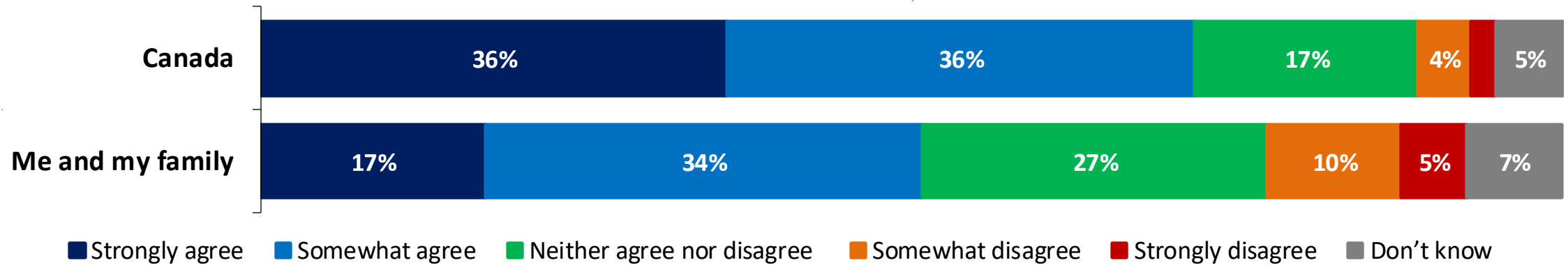


Impact of Tariffs: 72% of Canadians and only 27% of Americans think Trump's trade policies will have a serious impact on their countries



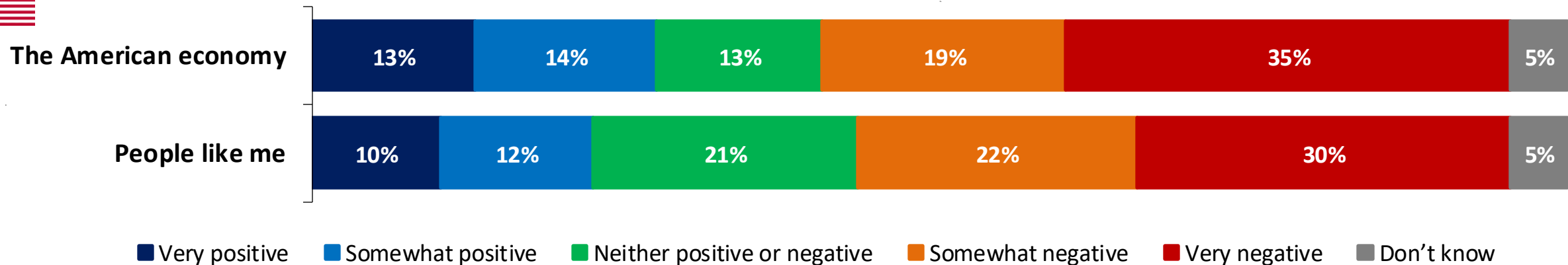
Do you agree or disagree with the following statements? *The Trump Administration's trade policies will have a serious impact on...*

[asked of all respondents; Canada May '25 W1+W2 n=1,500]



In your opinion are *President Trump's tariff policies* having a (rotate) negative or positive (end rotation) impact on....

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



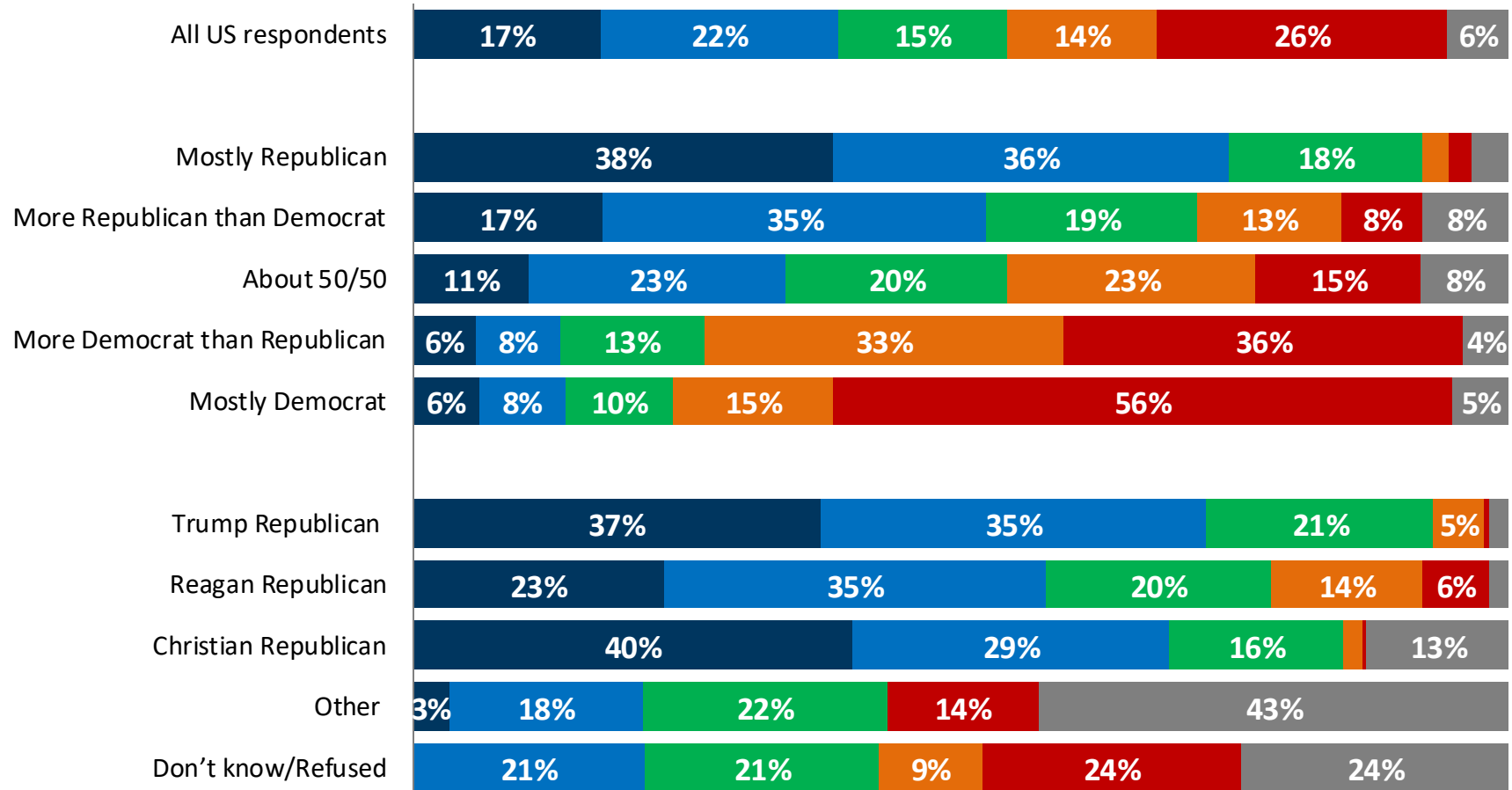
Tariffs BY Voting Habits: 3-in-4 Republicans think tariffs will be good for America in the long run; highest among Trump Republicans



Would you agree or disagree with the statement that “Tariffs will hurt in the short run but are good for America in the long run”?

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

“Tariffs will hurt in the short run but are good for America in the long run”



■ Strongly agree ■ Somewhat agree ■ Neither agree or disagree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

Note: N size for Libertarian too small (n<10) - excluded

Canadian Trump Reactions Update

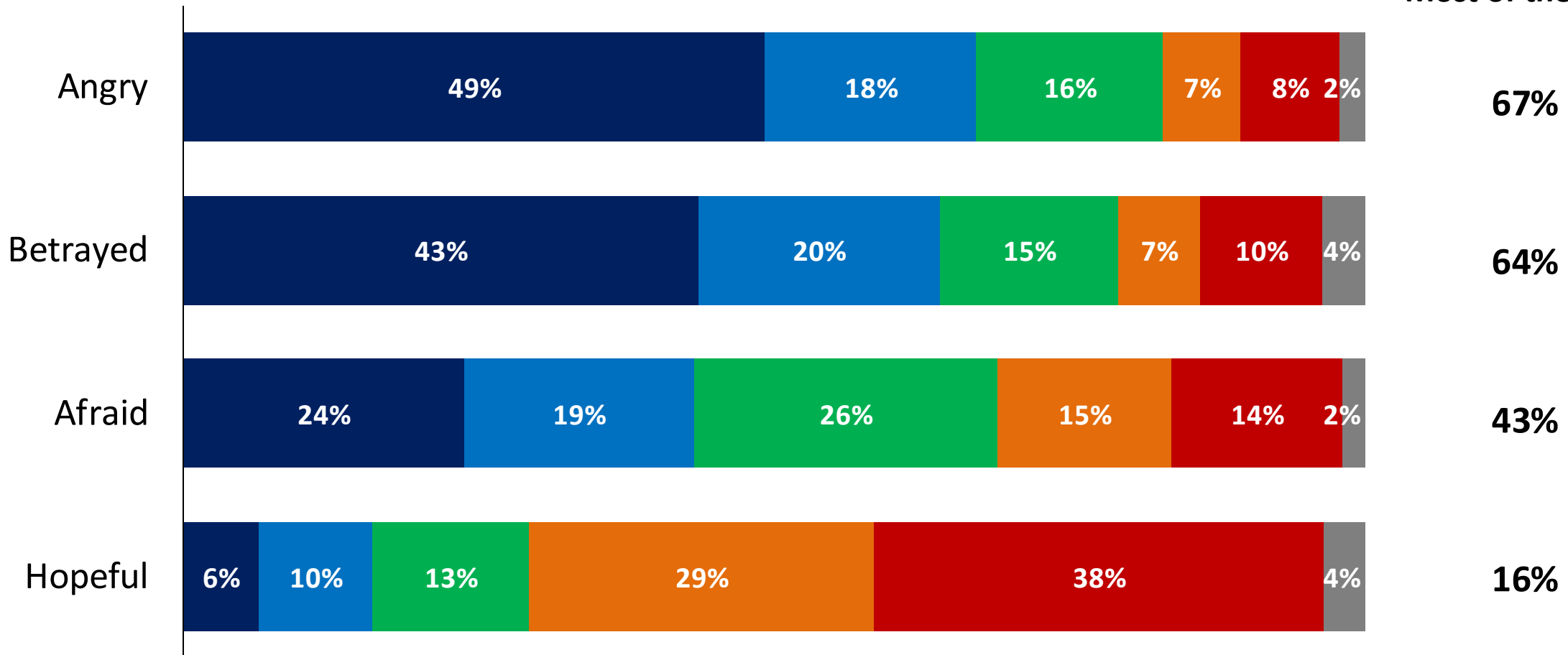
Trump Emotions: Majority of Canadians feel angry and betrayed about the way Trump is treating Canada. ⁶⁷

Q

When you think about the way President Trump is treating Canada, how often have you felt...?

[Asked of all respondents; March 2025 n=1,000]

**Every time +
Most of the time**



■ Every time I think about it

■ Rarely

■ Most of the time I think about it

■ Never

■ Some of the time I think about it

■ Don't know

Tariff Action

Nearly 3-in-4 (71%) agree it's important to respond with actions such as counter-tariffs to Trump's attacks

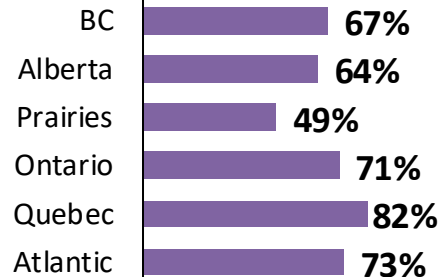
Segmentation

Responding with counter-tariffs

Age/Gender



Region

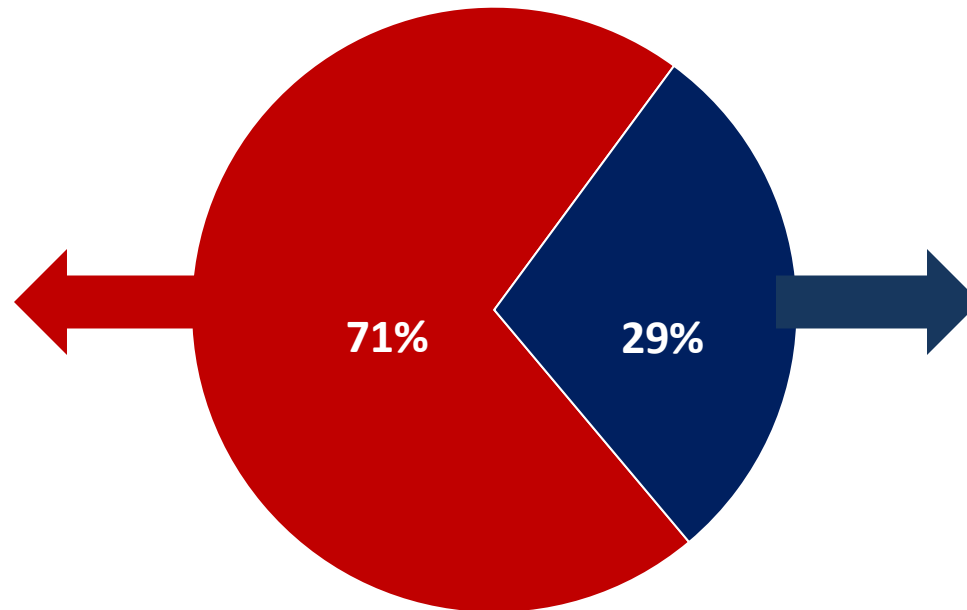


Value Clusters



Which of these two statements is closer to your view:

[asked of all respondents; May 2025 n=1,500]

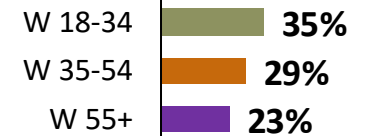


- It is important to respond with counter-tariffs or other action when the Trump administration attacks Canada with tariffs
- There is no reason to engage in tit-for-tat retaliation with the Trump administration on trade, since it just means Canadians pay more

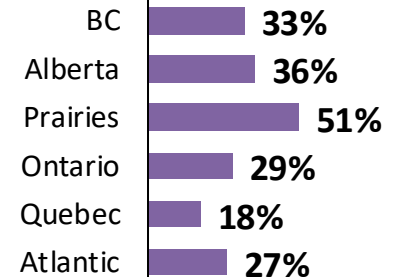
Segmentation

Not engaging in tit-for-tat

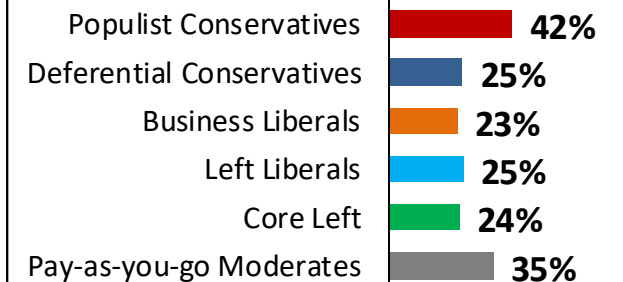
Age/Gender



Region



Value Clusters



Dealing with Trump

52% believe Canada should focus on its own interests rather than engage in disputes with the U.S

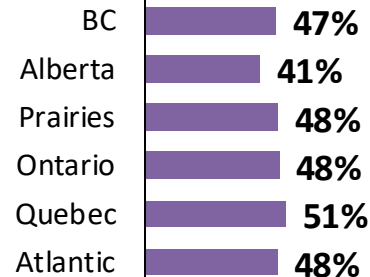
Segmentation

Standing up to bullying approach

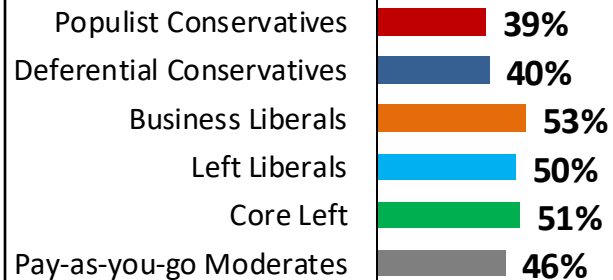
Age/Gender



Region

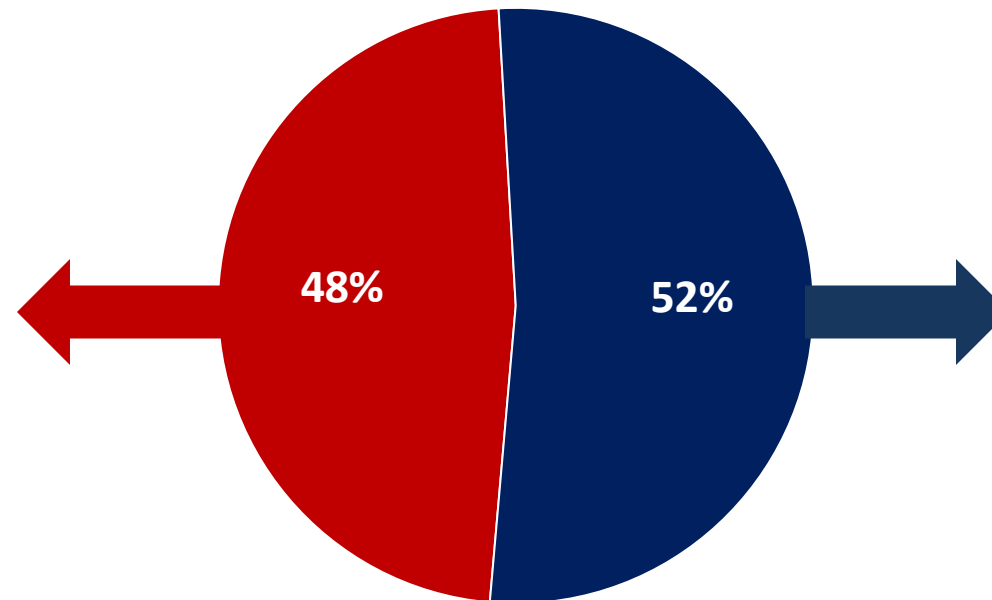


Value Clusters



Which of these two statements is closer to your view:

[asked of all respondents; May 2025 n=1,500]



- The only effective way to deal the Trump Administration's bullying approach is to stand up to them
- The Canadian government needs to focus on Canada's interests and not get sucked in to unproductive fights just because of something the Trump Administration said

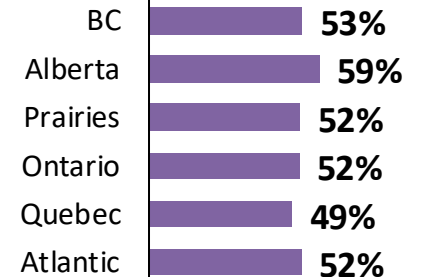
Segmentation

Not getting stuck into unproductive fights

Age/Gender



Region



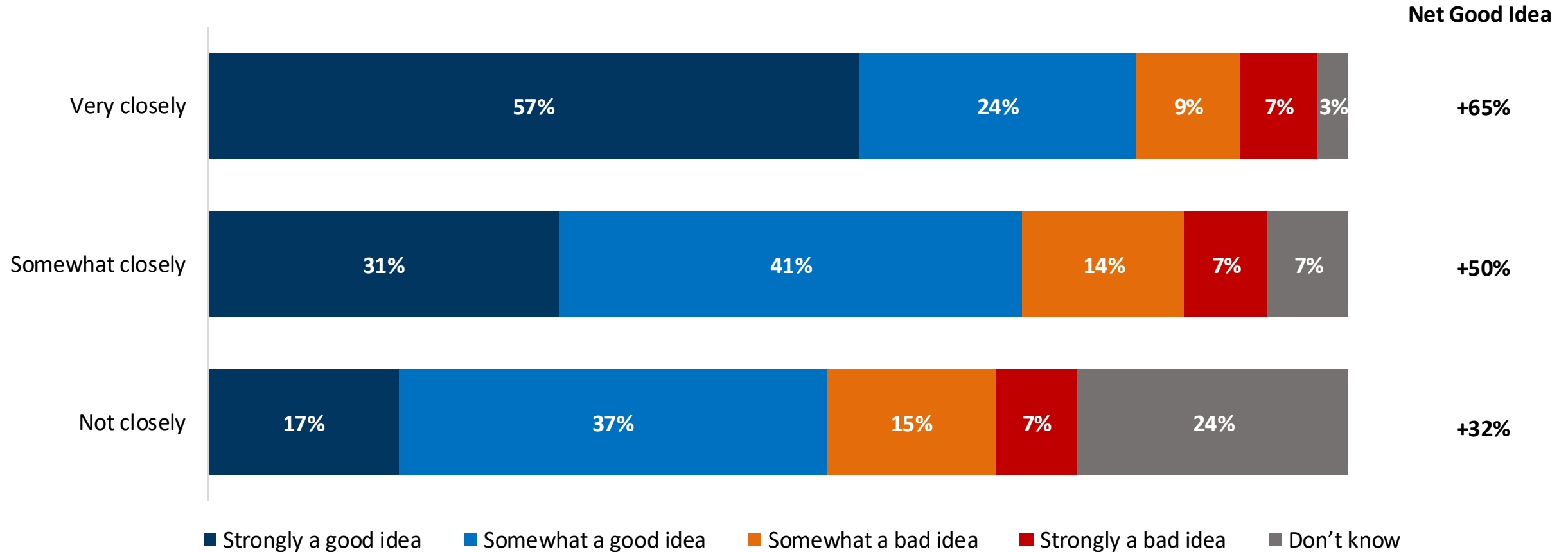
Value Clusters



Attitude Towards The Surcharge by Engagement with News:

81% of Canadians who follow the news very closely think it's a good idea

Q Do you think Doug Ford's initial plan to impose a 25% surcharge on electricity exports to the US is (ROTATE GOOD OR BAD) a good idea or a bad idea? **BY** How closely have you been following these developments?
[asked of all respondents; March 2025 n=1,000]



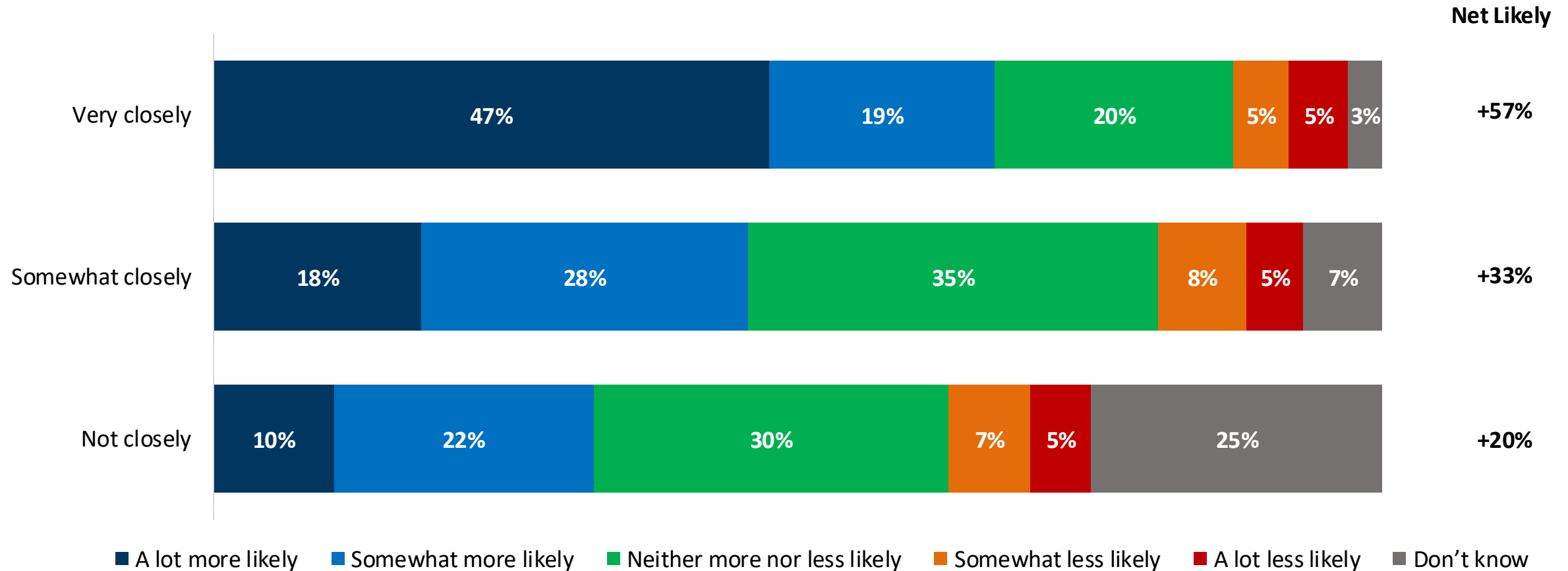
'Not closely' is a sum of 'Not very closely' and 'Not closely at all.'

Support For Retaliatory Actions by Engagement with News:

67% of Canadians who follow the news very closely are likely to support future Canadian retaliatory actions

Q Do these events leave you feeling (ROTATE MORE OR LESS) more likely or less likely to support future Canadian retaliatory actions against US tariffs on Canadian goods? **BY** How closely have you been following these developments?

[asked of all respondents; March 2025 n=1,000]



'Not closely' is a sum of 'Not very closely' and 'Not closely at all.'

Where does this leave us?

- 1. Carney has a change mandate – EVEN AMONG LIBERALS**
- 2. Canadians want Carney to stand up to Trump by building a stronger Canadian economy that provides a more affordable life.**
- 3. So far Canadians like what they are seeing from Carney.**
- 4. Canadians embrace ‘Build Baby Build’ idea at a high level. But initial reaction to Ontario ‘fast track’ bills shows risk remains.**
- 5. Energy transition remains positive, but support for fossil fuels stronger than ever.**
- 6. While trade is not a ‘bottom up’ issue in the US, so far Trump is keeping his base on board.**
- 7. Canadians want to hit back, putting pressure on governments to do things that could make Canada a target in the US.**



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Building Understanding.