

“

”

Setting the Stage

CCRE Kananaskis 2025

Presentation
Date: October, 2025

A Mandate for Change

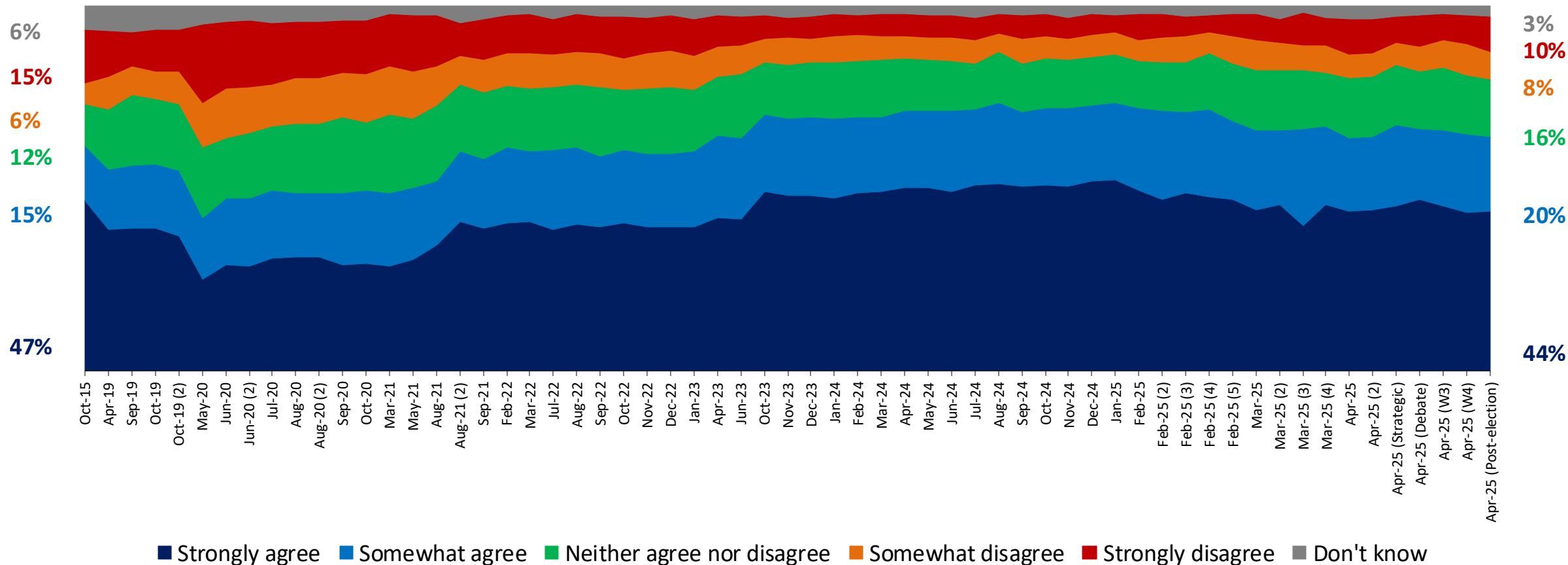
Time for Change Liberals Tracking:

After peaking in W3 of April, time for change trends back to the end of march levels (64%)



Please indicate whether you agree or disagree with the following statements. - It was time for a change in government here in Canada

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



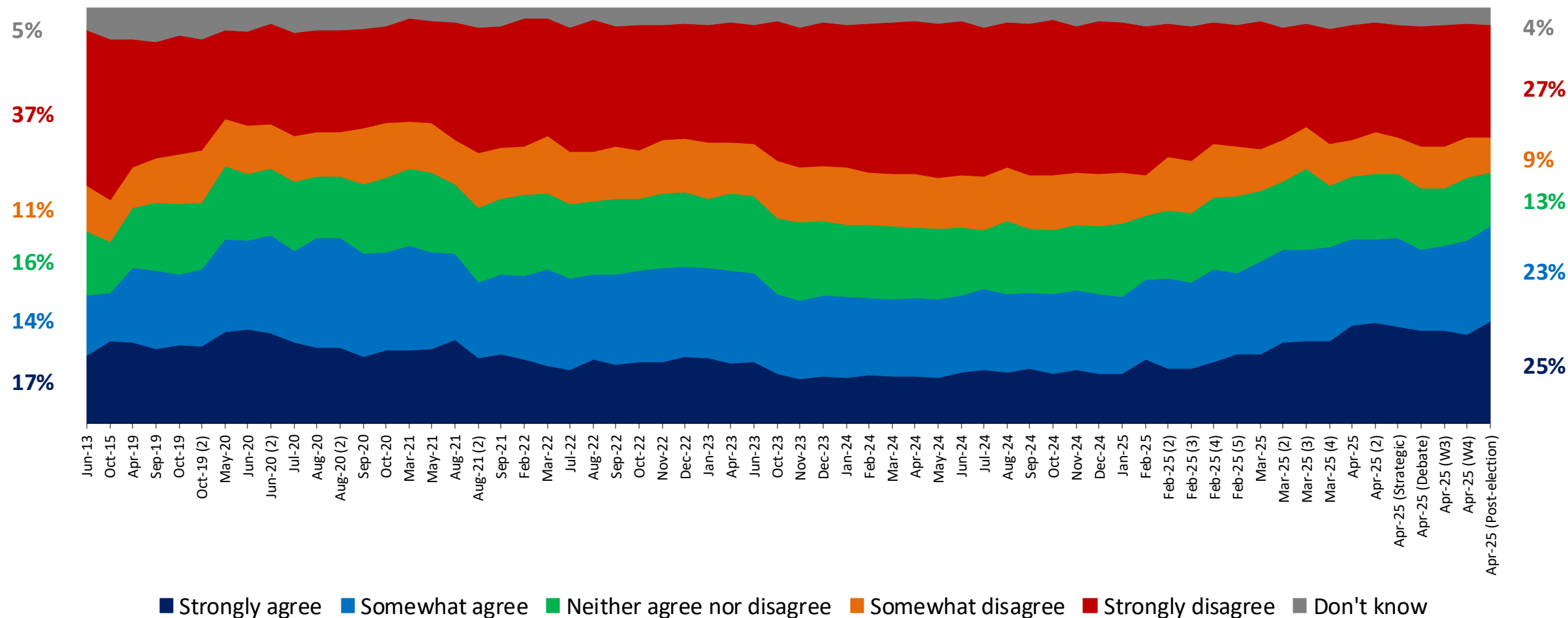
Time for Change Liberals Tracking:

Agreement that the Liberals are the best party to form government is at 48% - all time high



Please indicate whether you agree or disagree with the following statements. - In the last election, I felt the Liberal Party had their problems, but they were still the best party to form government.

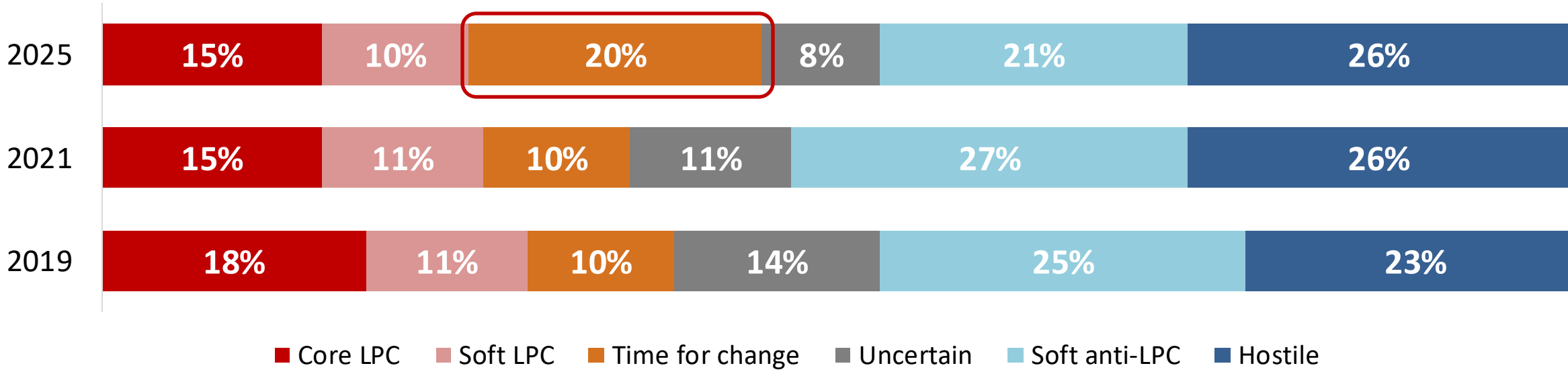
[asked of all respondents; n=2,000]



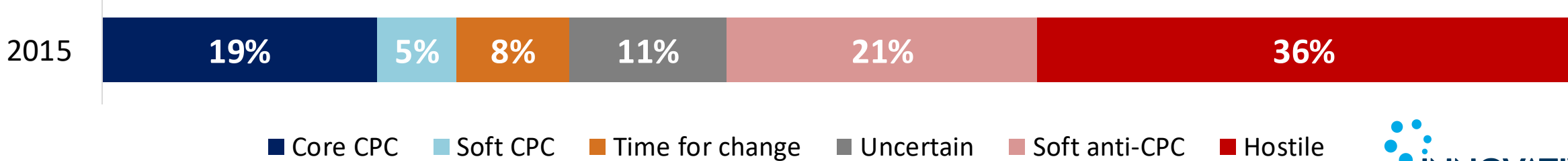
Time for Change Liberals: Voters who believe it's time for a change but ALSO believe the Liberals are the best option

Time for Change segmentation BY Election

Liberal incumbent



Conservative incumbent



Vote by Time for Change:

Conservatives lead among Soft anti-LPC and Hostile segments, while Liberals lead in all other groups

Thinking about the choices available in your riding, which party's candidate did you vote for? [Don't know excluded]

[only decided voters; n=1,696]

Time for Change

Vote (Col%)	Core LPC	Soft LPC	Time for change	Uncertain	Soft anti-LPC	Hostile
	(N=289)	(N=201)	(N=397)	(N=75)	(N=295)	(N=440)
Conservative	2%	7%	24%	21%	57%	88%
Liberal	88%	74%	58%	50%	22%	1%
NDP	5%	8%	8%	15%	8%	3%
Bloc	4%	8%	6%	9%	10%	5%
Green	1%	2%	2%	3%	1%	1%
Other	0%	2%	2%	1%	2%	2%

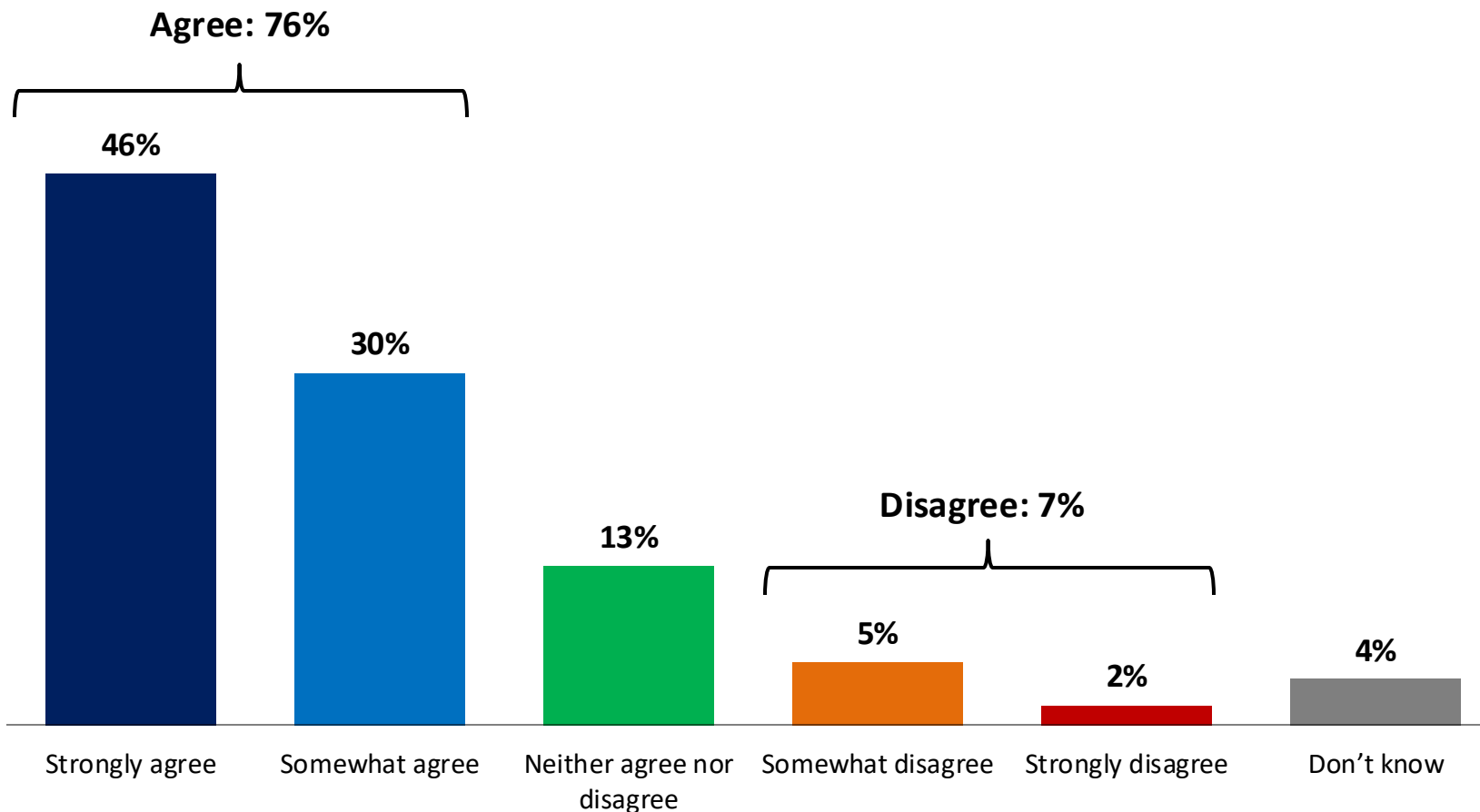
Note: Current data: April 2025

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"

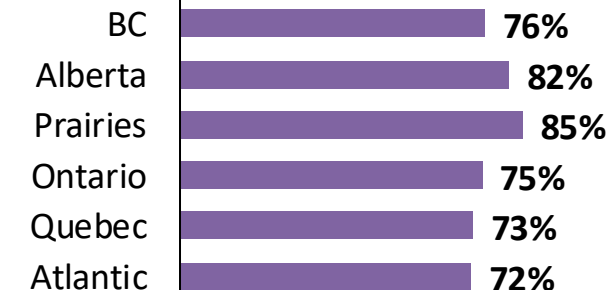
Gender



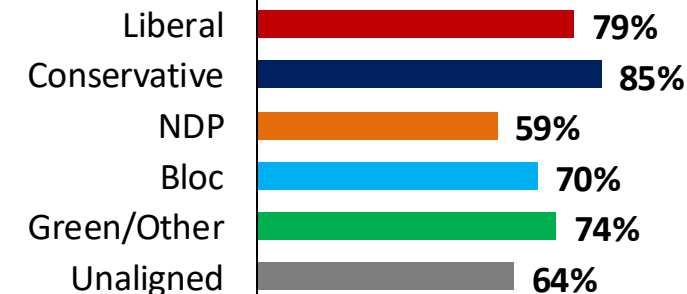
Age



Region



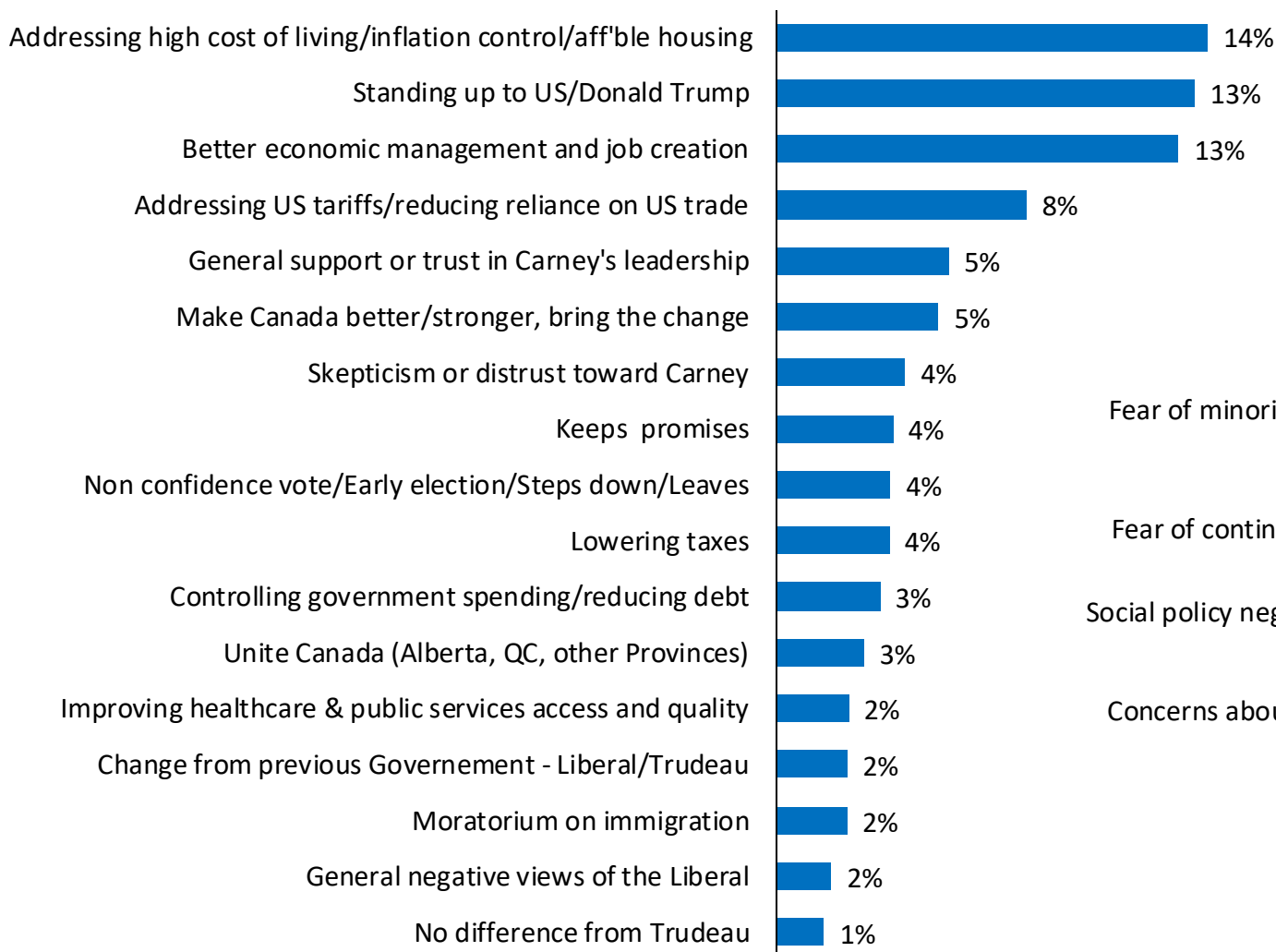
Party ID



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



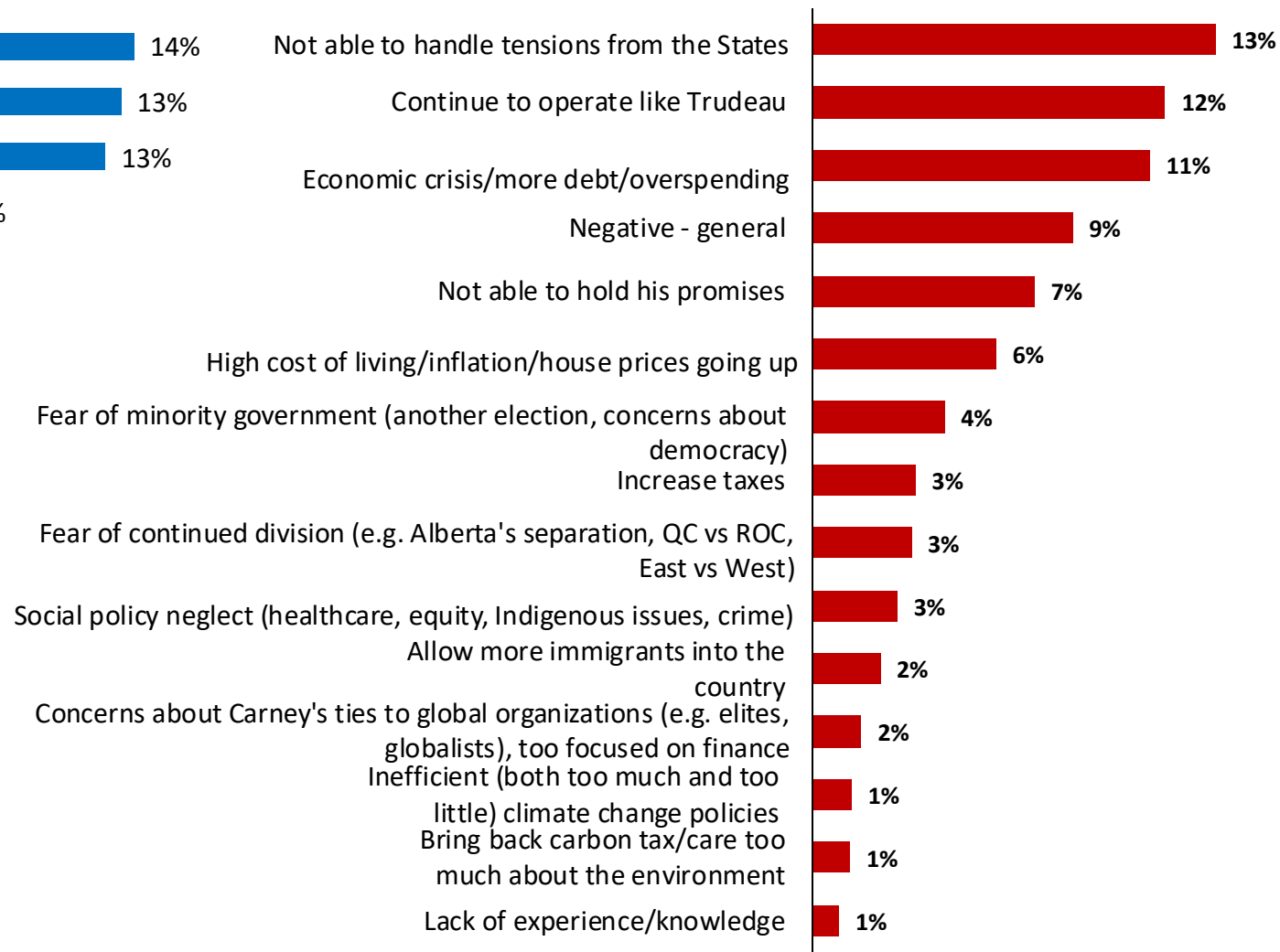
What is your greatest **hope** for Prime Minister Mark Carney and the newly elected Liberal government?[OPEN ENDED] [n=1,000]



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



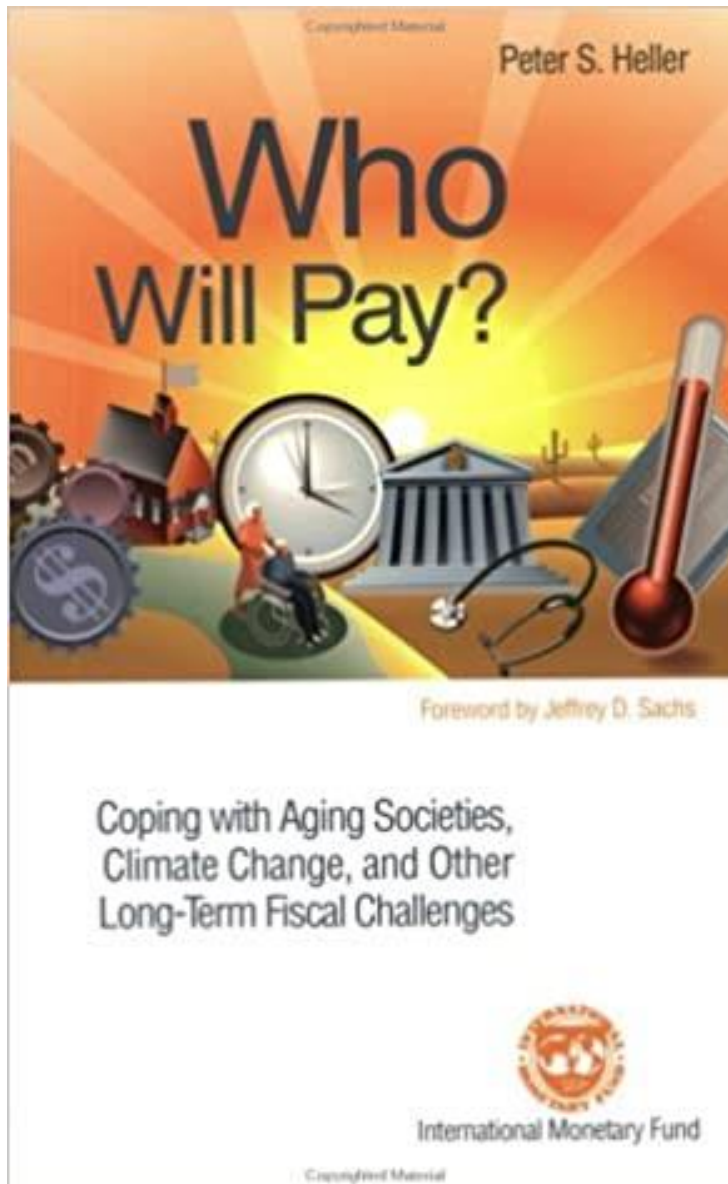
What is your greatest **fear** about Prime Minister Mark Carney and the newly elected Liberal government?[OPEN-ENDED] [n=1,000]



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

The Generational Challenge

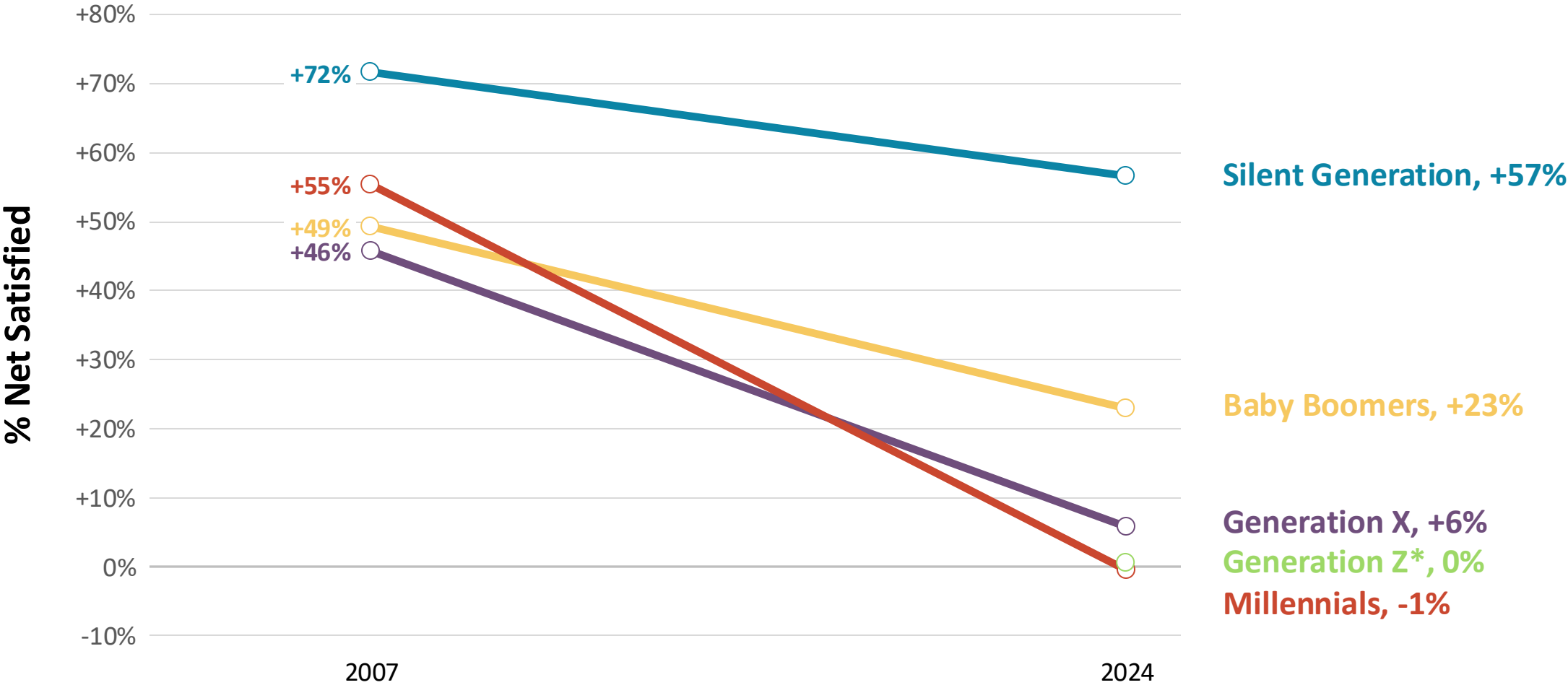
We left off on fundamental challenges that are changing Canadian realities



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.

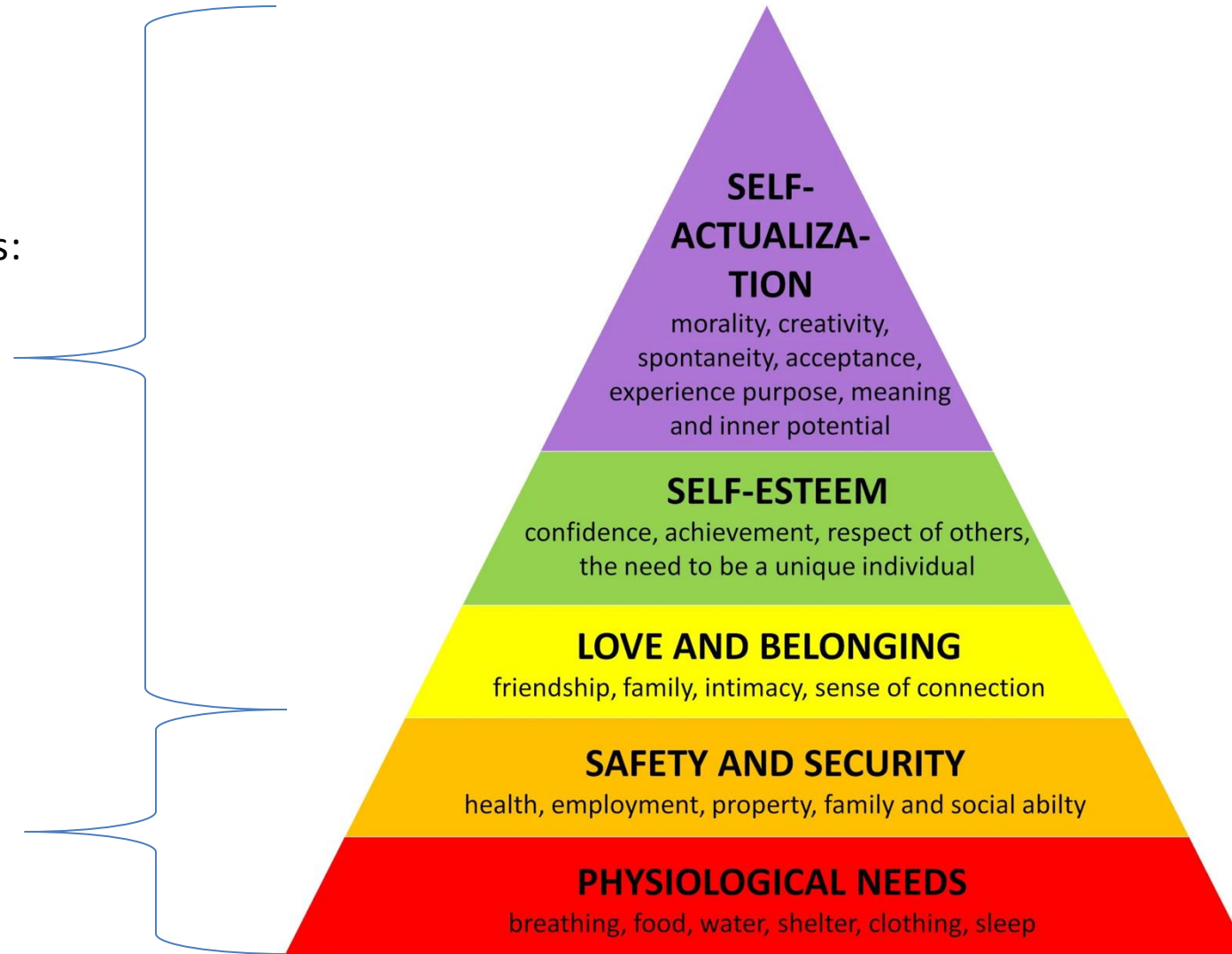
The politics of scarcity is also focusing us more on materialist concerns

Post Materialism Issues:

- Reconciliation
- Gender Equity
- Environment

Materialist Issues:

- Affordability
- Housing
- Safety



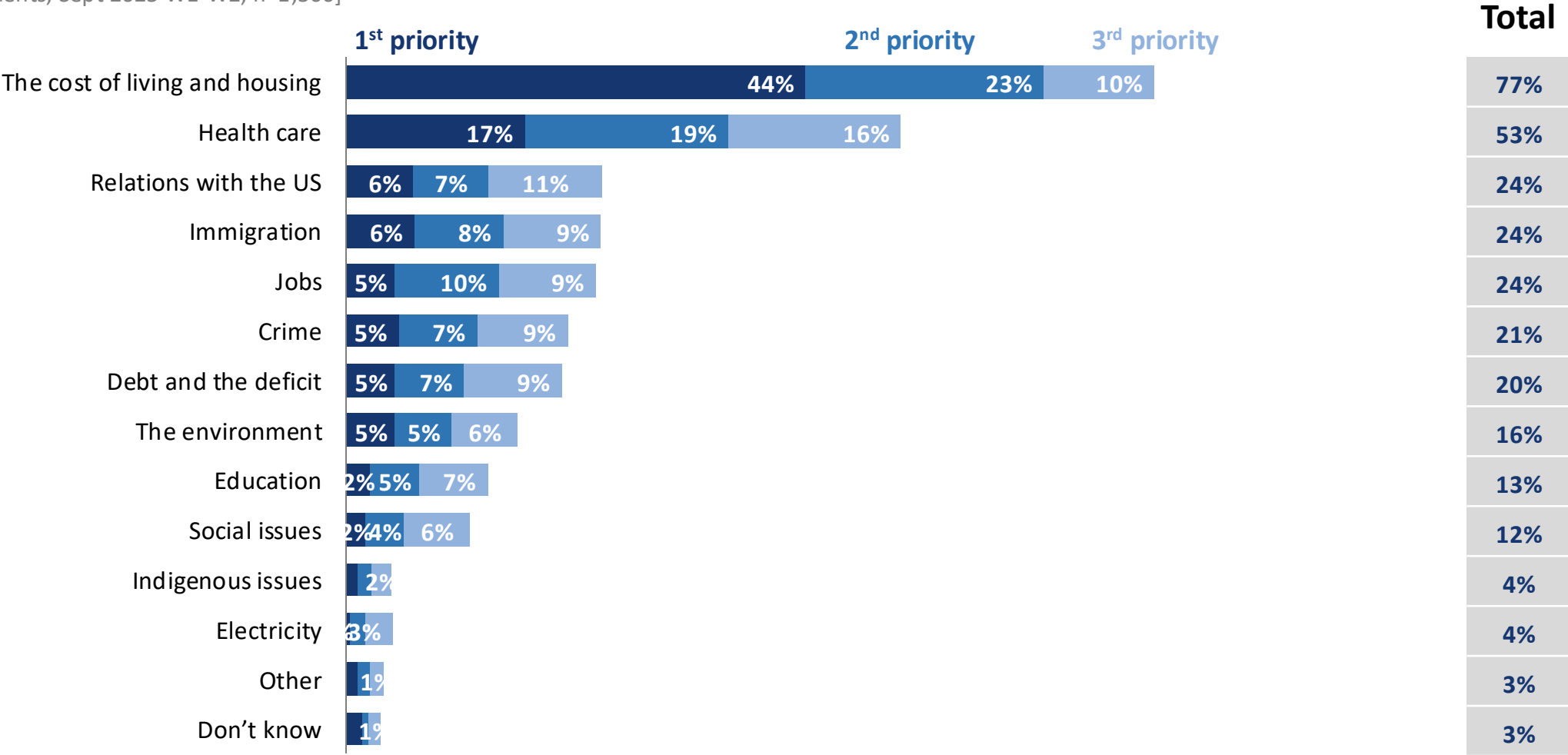
Top of Mind:

The cost of living and housing is a top priority, with 2-in-5 in agreement; health care comes in second



Which of the following issues is the most important issue to you? And which is the second most important to you?
And which is the third most important to you?

[asked of all respondents, Sept 2025 W1-W2, n=1,500]



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

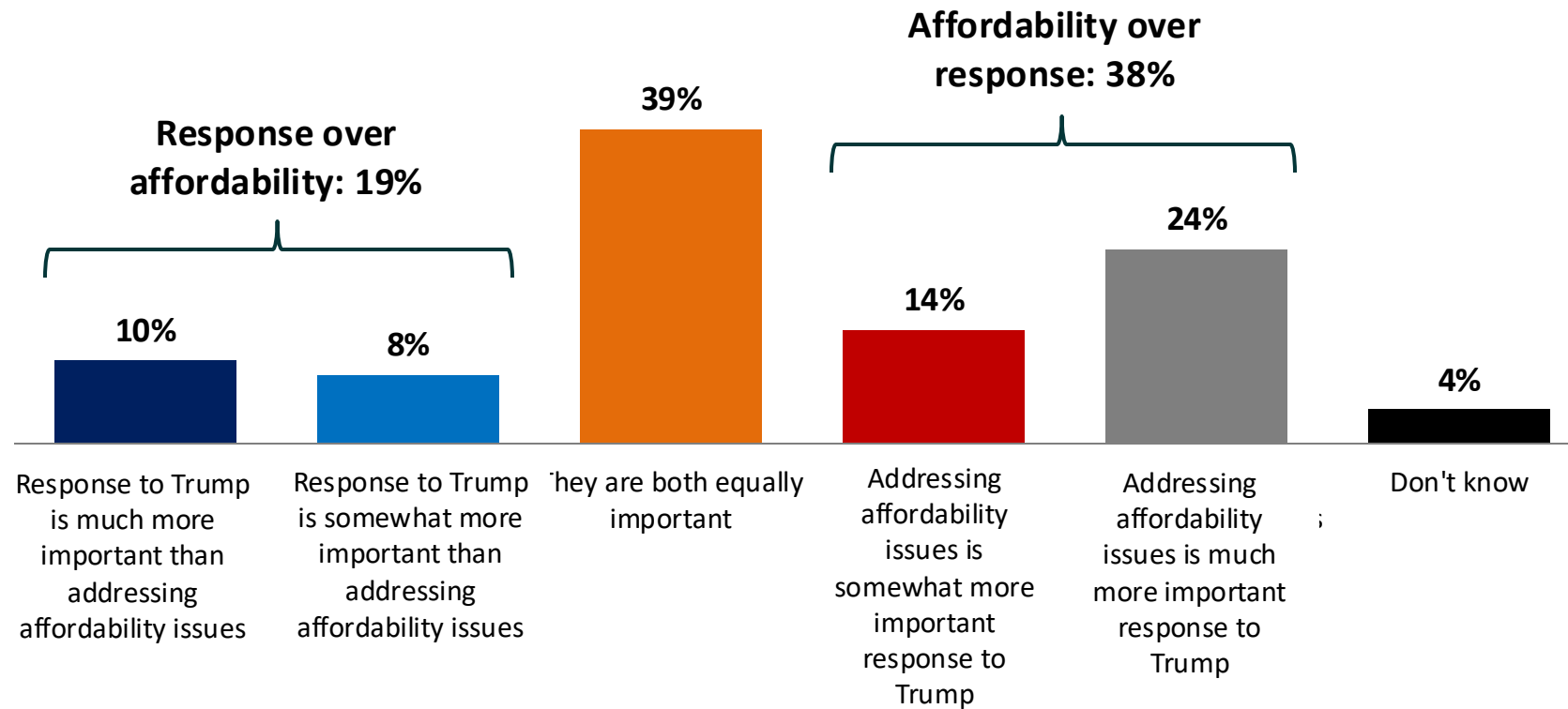
Voter Priorities: U.S. Relations vs. Affordability

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 "Affordability"

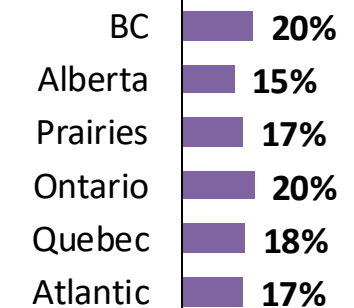
Gender



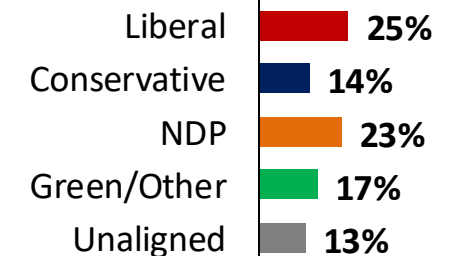
Age



Region



Party ID



Voter Priorities: U.S. Relations vs. Affordability

Majority of those who prioritize a response to Trump vote Liberal

Q

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 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%

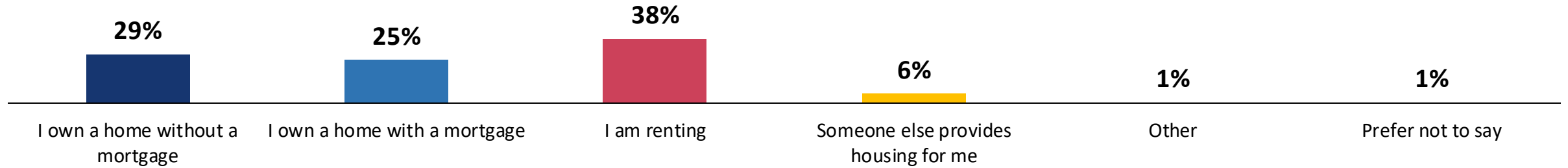
Housing Segmentation Attributes:

Over half (54%) own a home with or without mortgage, while 38% are renting



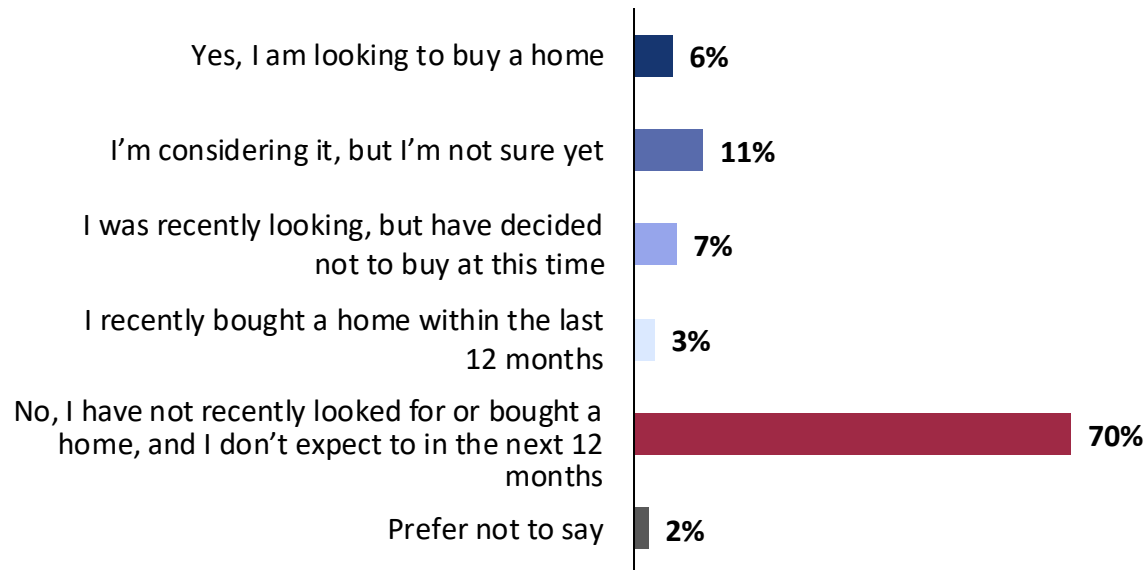
Which of the following best applies to your current situation?

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



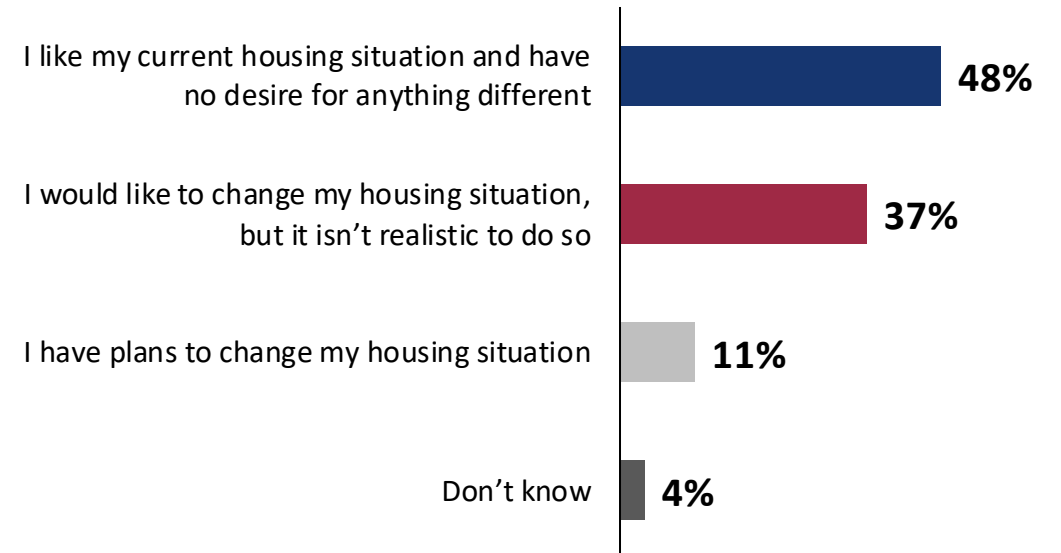
Are you currently looking to buy a home within the next 12 months, or have you done so in the past 12 months?

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



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=1,500]



Housing Segmentation:

Just over 1-in-3 qualify as happy homeowners; almost 1-in-5 are thwarted homeowners

Q

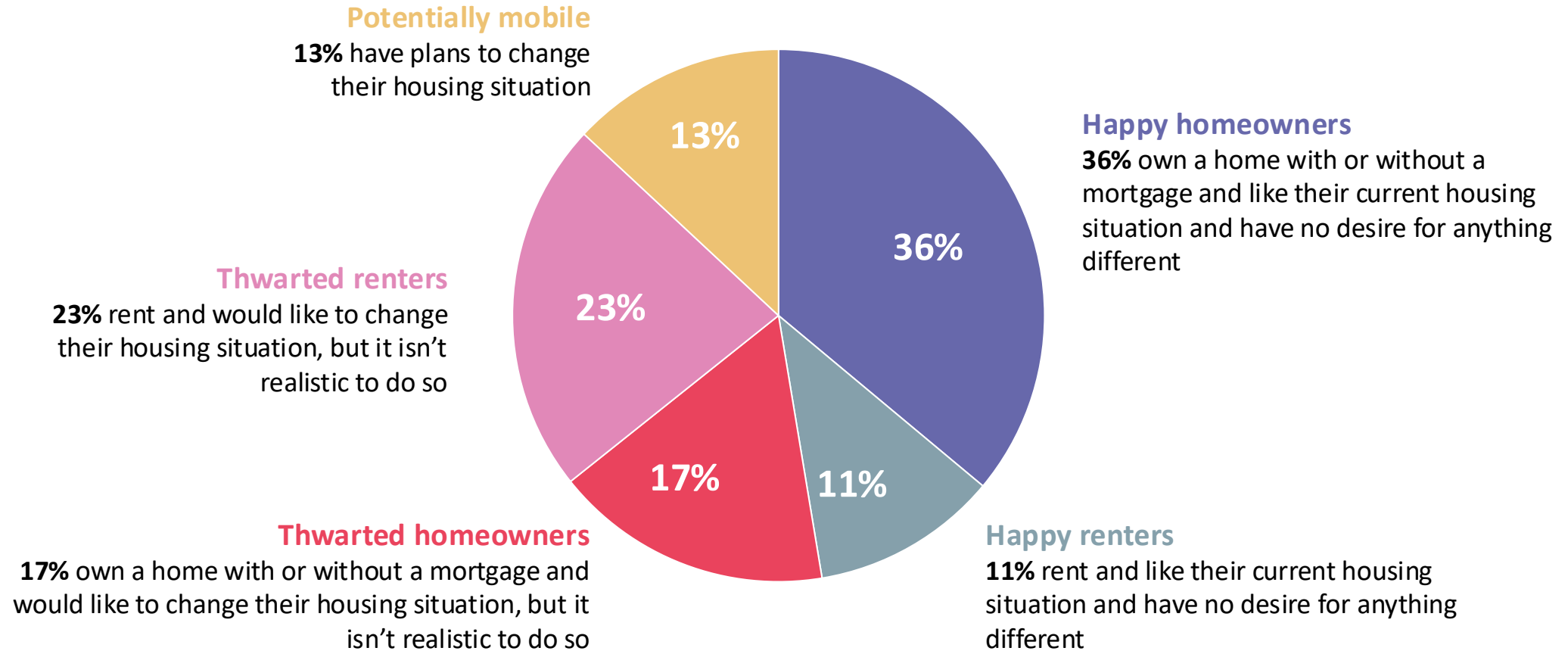
Housing Segmentation – the following 3 questions were used to create the segmentation:

Which of the following best applies to your current situation?

Are you currently looking to buy a home within the next 12 months, or have you done so in the past 12 months?

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, Sept 2025 W1-W2, n=1,282]



Housing Segmentation by Age and Region:

Happy homeowners in Ontario lower than national average, higher among Baby Boomers/Silent Generation

Q Housing Segmentation by Age and Region:
[asked of all respondents, Sept 2025 W1-W2, n=1,282]

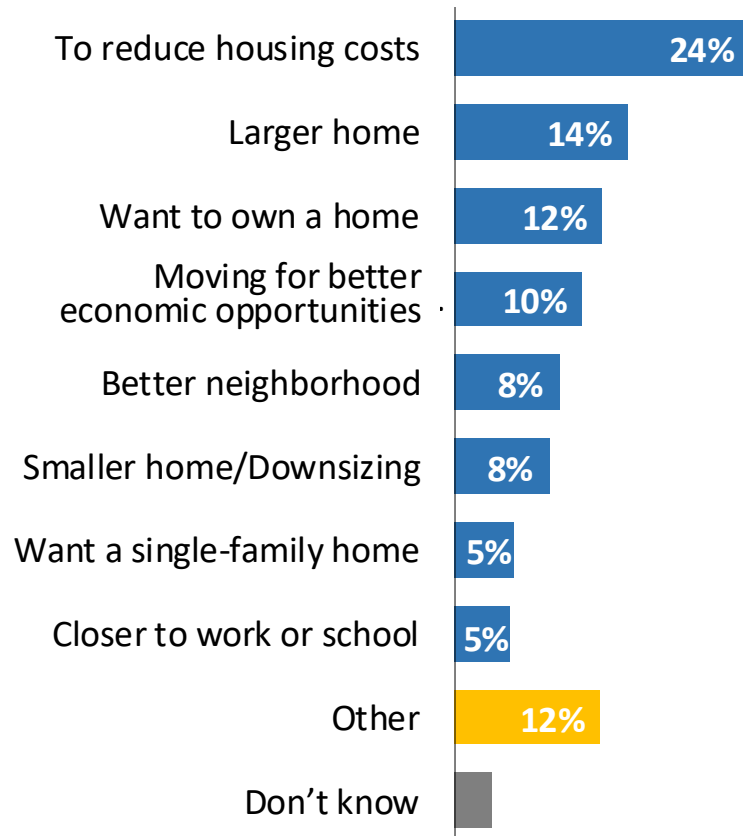
		Generation			
	Overall	Gen Z (18-24)	Millennials (25-44)	Gen X (45-64)	Boomers/ Silent (65+)
Happy homeowners	36%	16%	22%	35%	50%
Happy renters	11%	8%	9%	11%	14%
Thwarted homeowners	17%	17%	20%	17%	14%
Thwarted renters	23%	40%	31%	25%	14%
Potentially mobile	13%	19%	19%	12%	9%

Motives for Change:

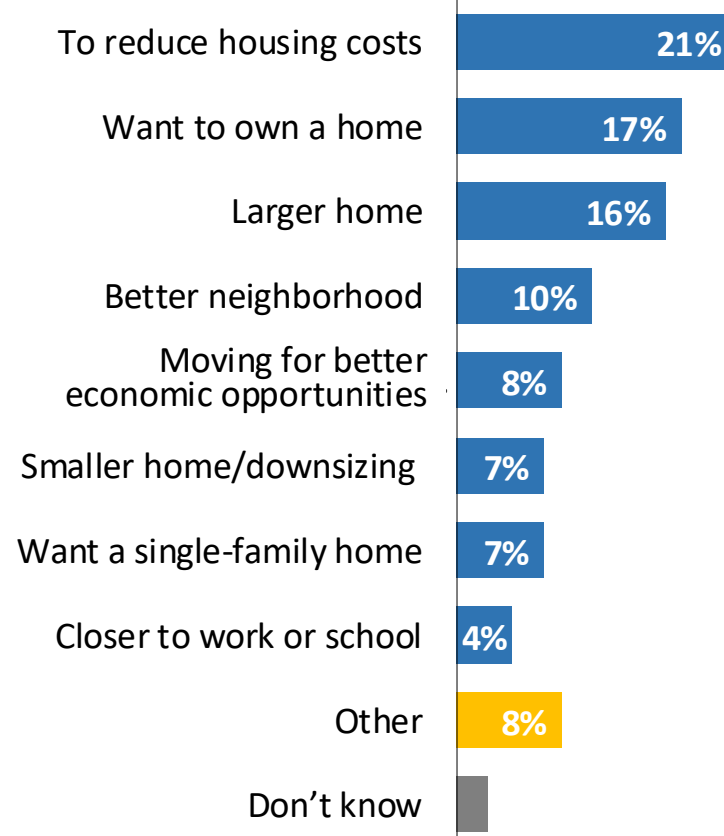
Reducing housing costs remains a top reason for change, with over 1-in-5 saying so

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=555]

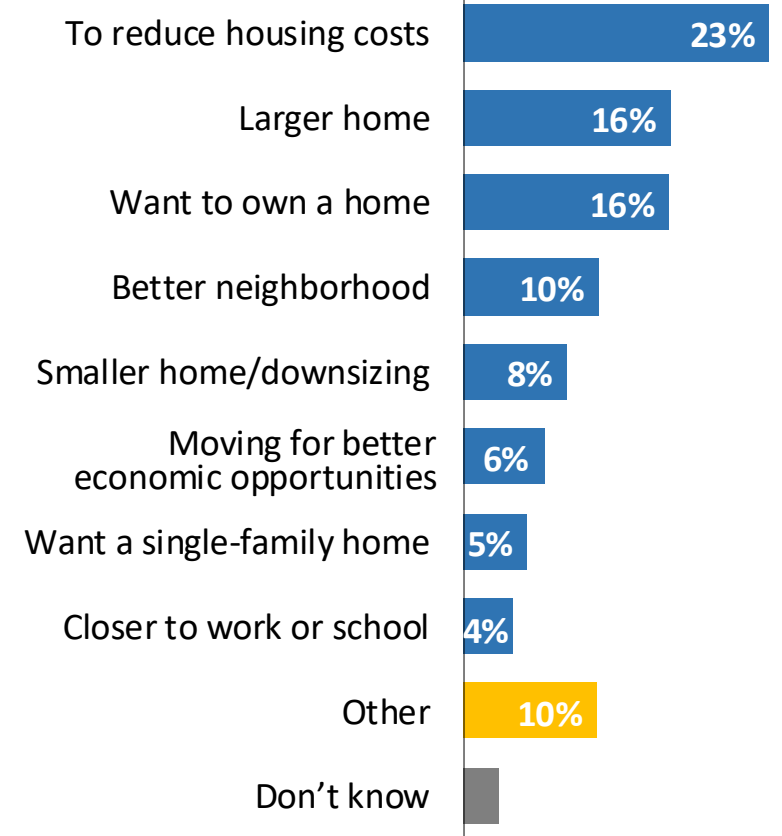
Aug. '24



Apr. '25



Sep. '25

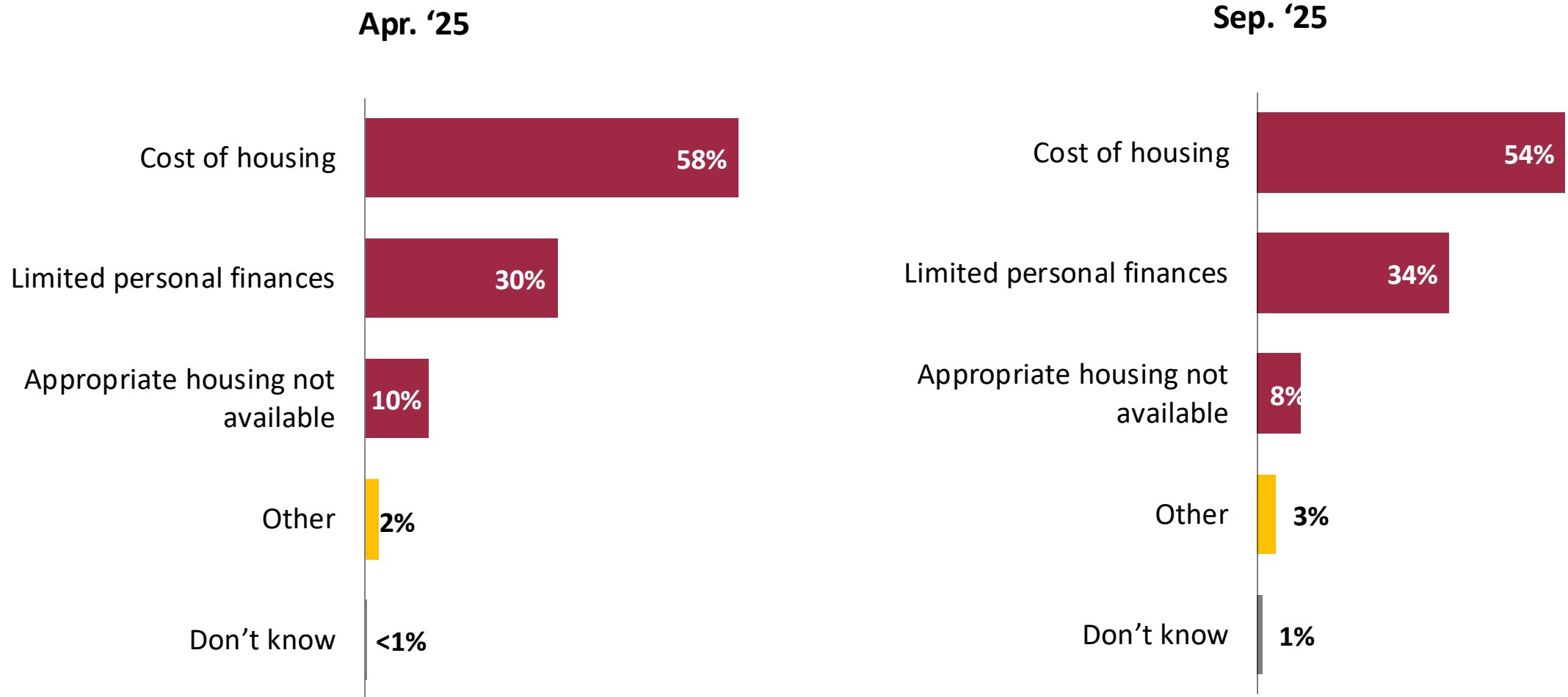


Barriers to Change:

More than half cite cost of housing as the most important reason, followed by limited personal finances (34%)



Which of the following is the most important reason that is 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=555]



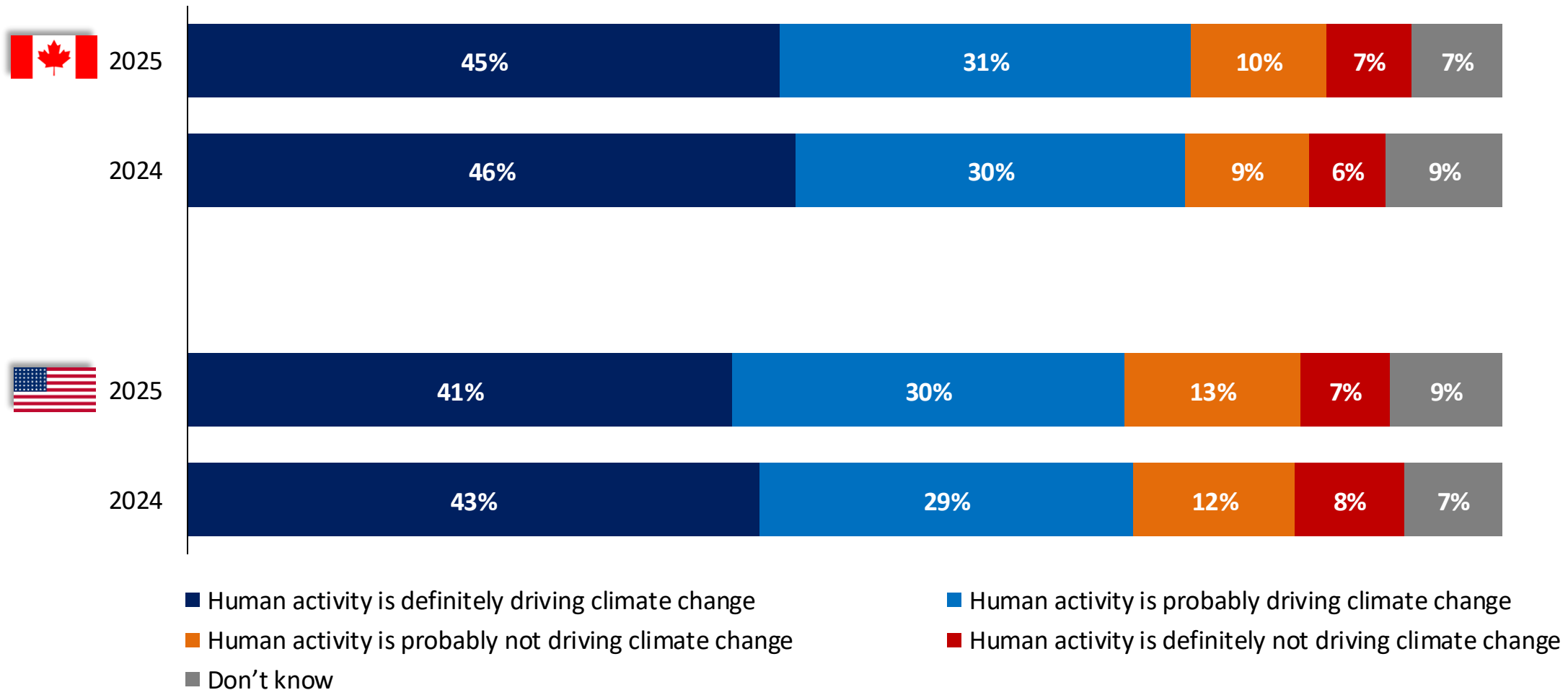
The Impact on Energy Issues

While We Continue To Care About Climate Change ...



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

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

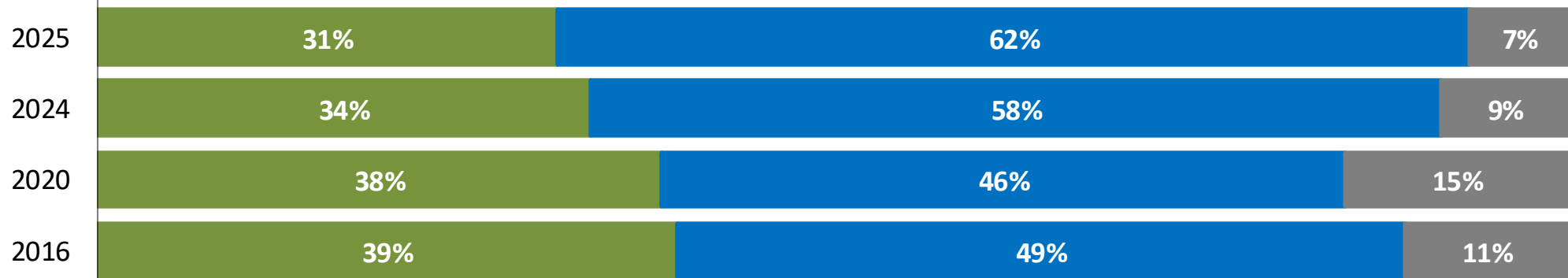
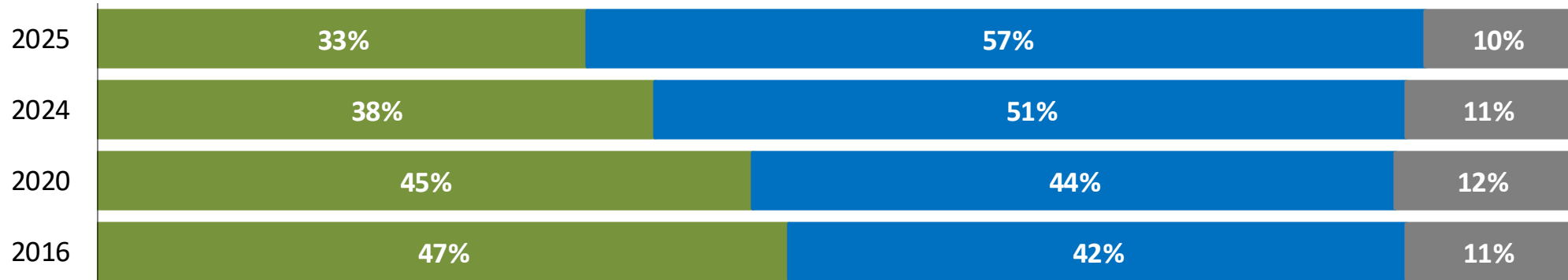


Our Priorities Are Changing



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]



■ The environment ■ The economy ■ Don't know

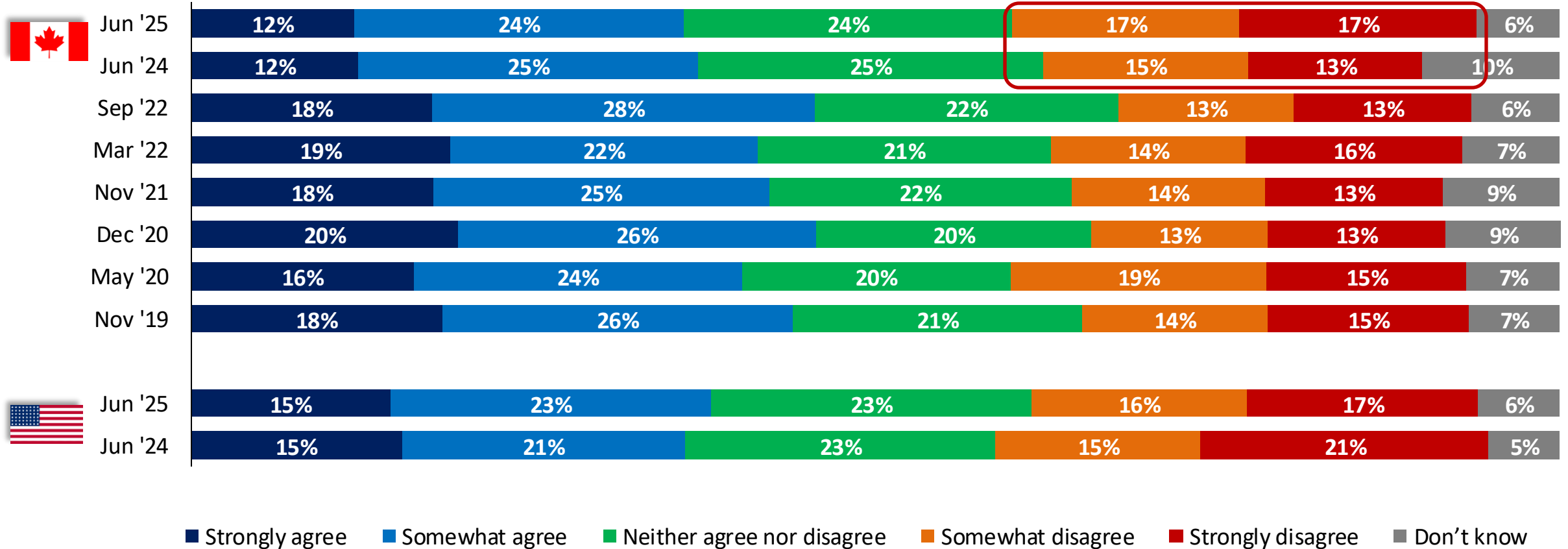
Pro-Energy Transition: 38% of US and 36% of CA agree on phasing out fossil fuels; 34% disagree, with Canadian disagreement up 6 points



Do you agree or disagree with the following statements?

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



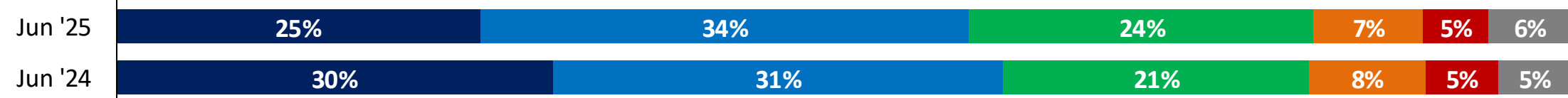
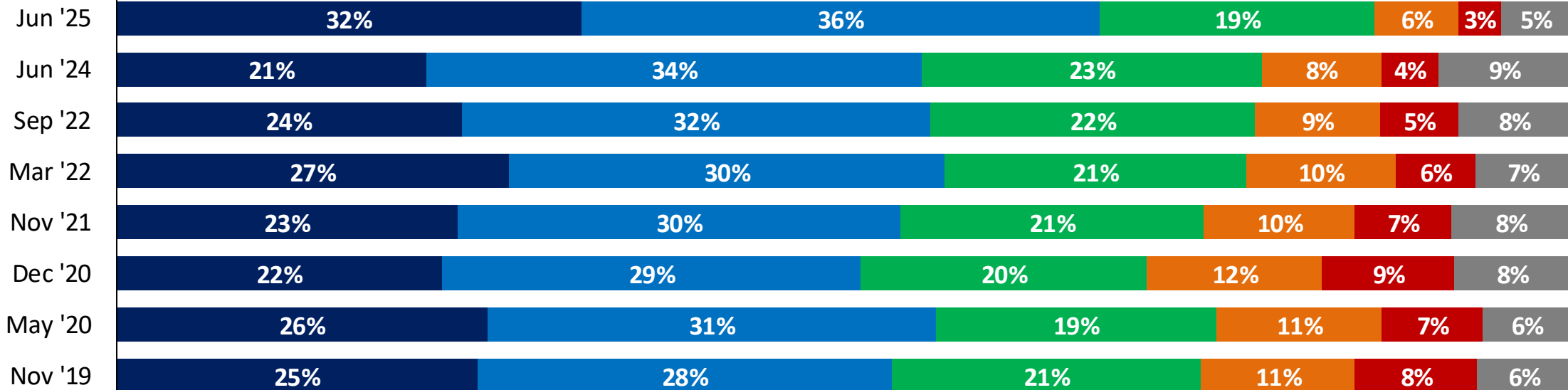
Pro-Oil: 68% of Canadians agree with responsibly developing oil and gas,²⁵ 12-pt jump since 2024; strong agreement down 5 pts for Americans



Do you agree or disagree with the following statements?

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

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: Those who live in BC and AB are more likely to agree with the responsible development and export of Canadian oil and gas

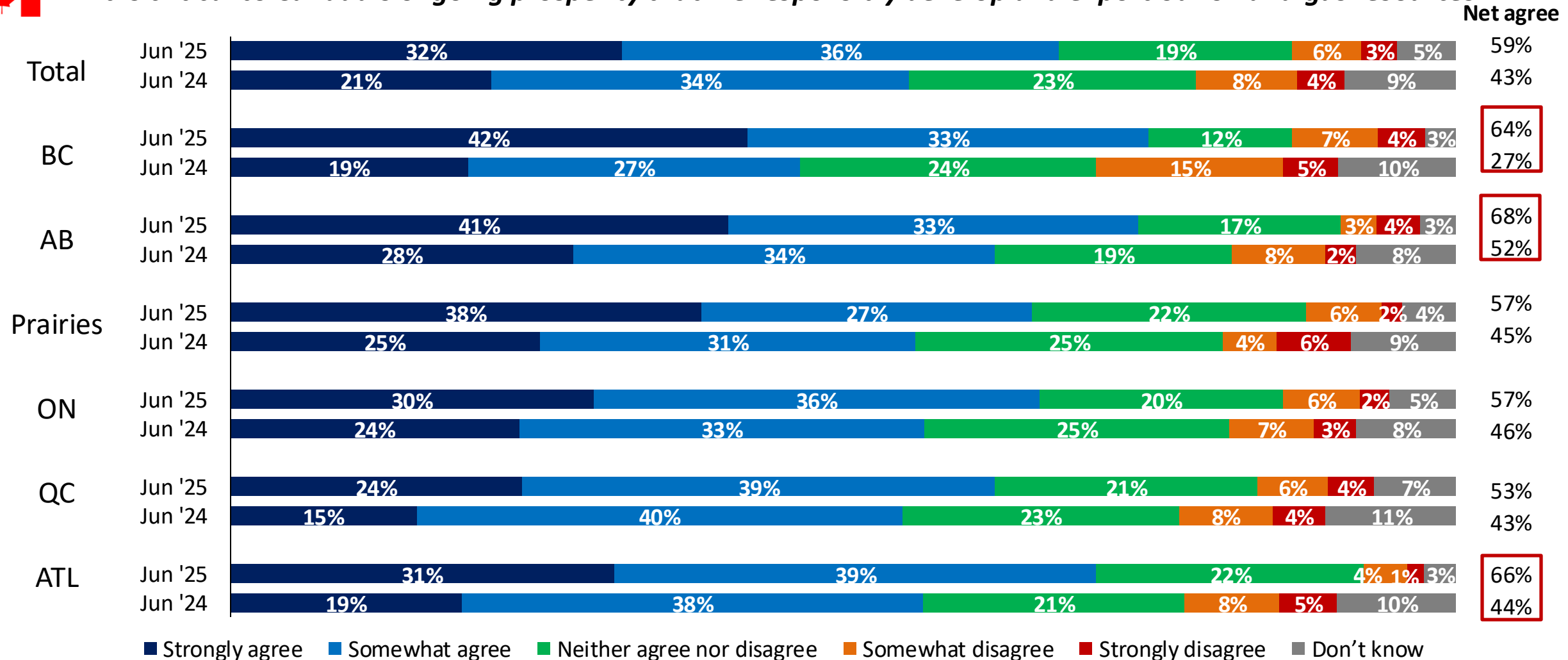


Do you agree or disagree with the following statements?

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



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

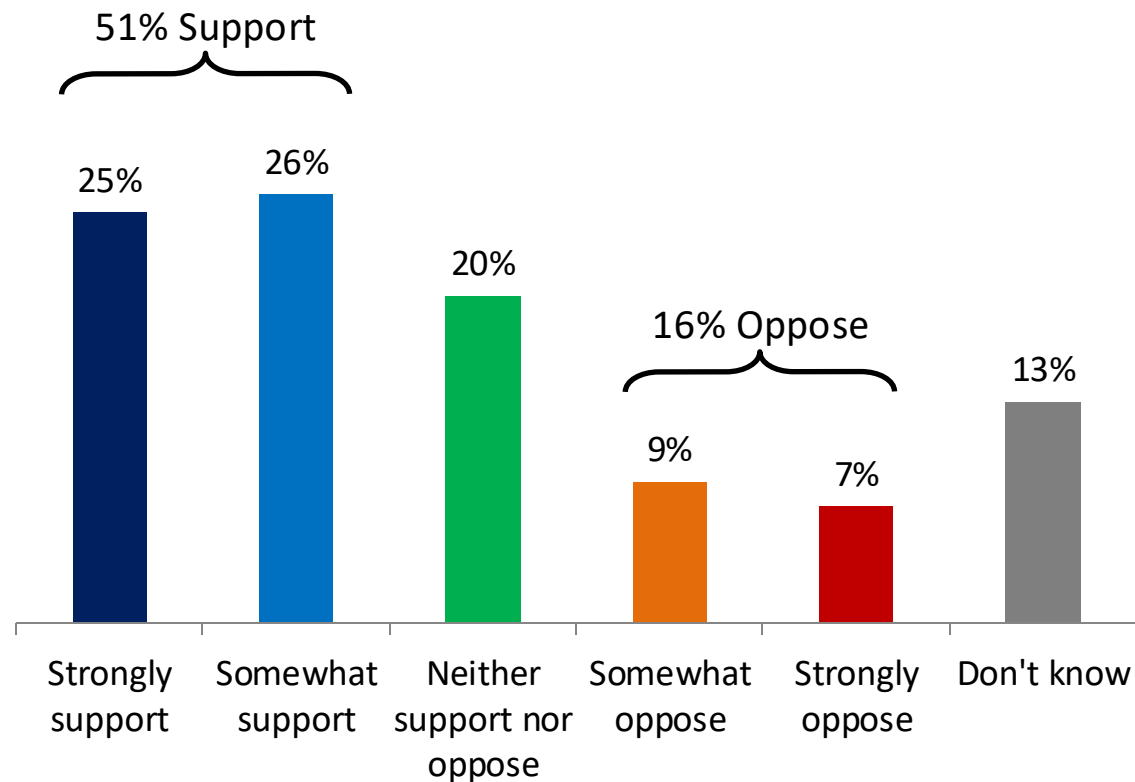


New Pipeline: Almost Over half (51%) support the plan to build a new pipeline; those in the Quebec region are less likely to support

Q

Danielle Smith, the Premier of Alberta, has announced a new plan to propose the building of a new pipeline under the aegis of the Federal government's Major Projects Office. The pipeline would start in Alberta and then run across to the north coast of British Columbia, to ship to markets overseas. Do you support or oppose the construction of this pipeline?

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



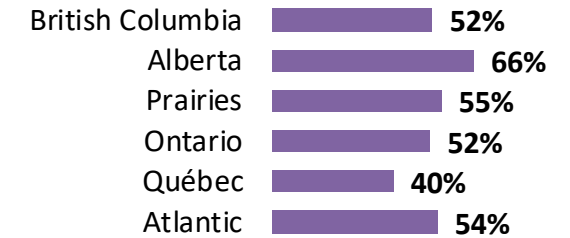
2025 Sample Breakdown

Respondents who say 'Support'

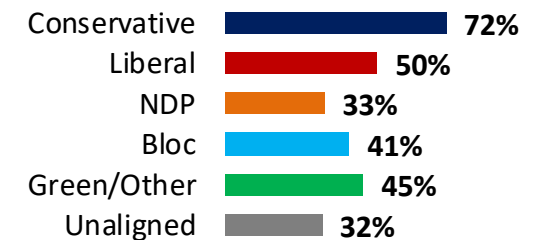
Age



Region



Federal Party ID



Economic Gap



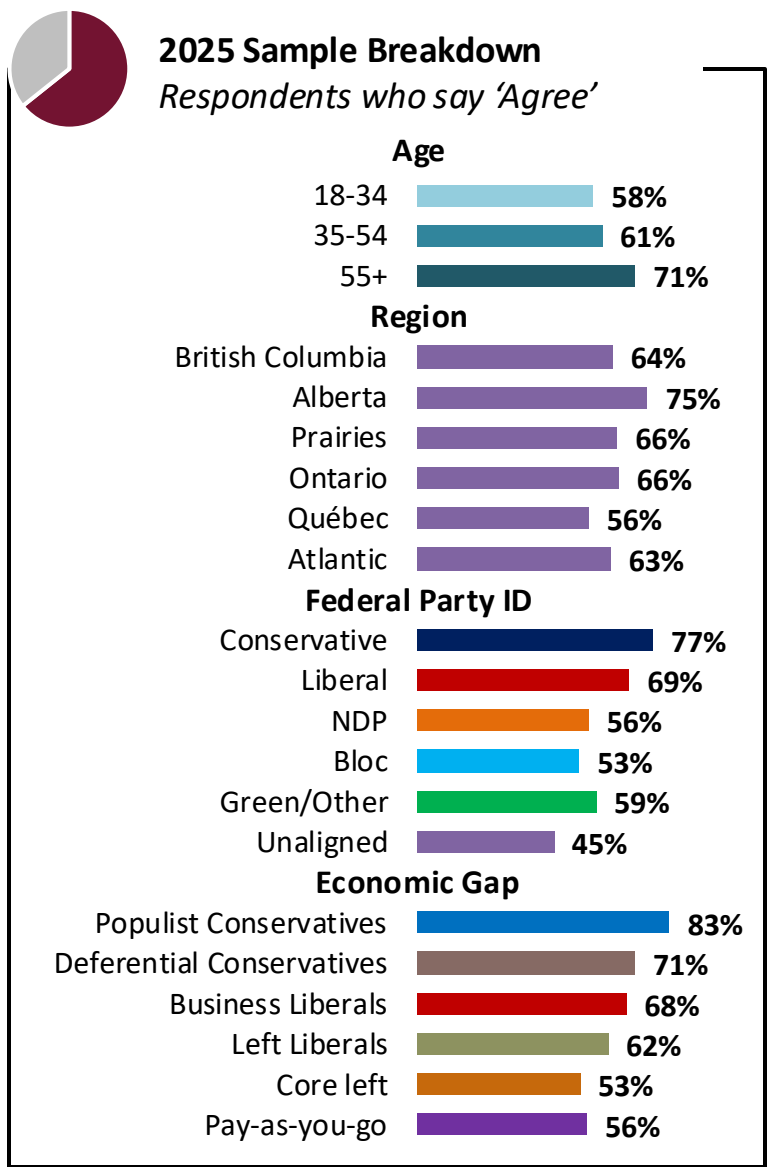
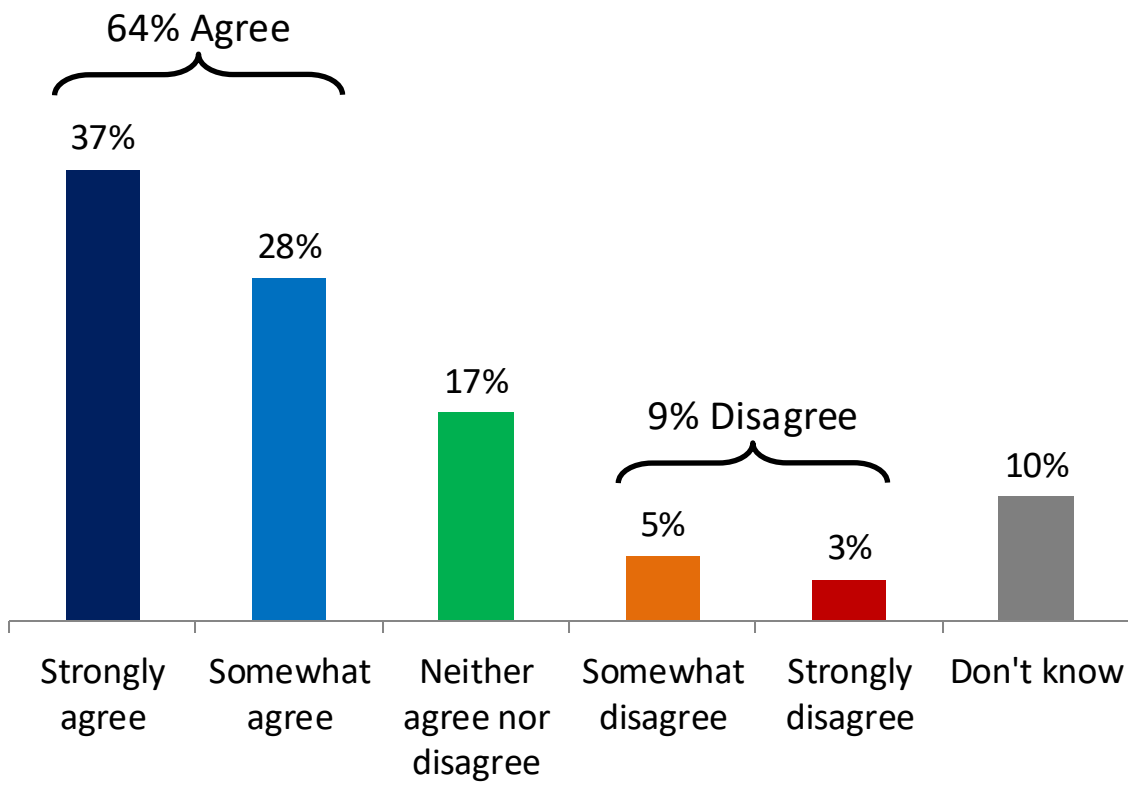
New Pipeline: Alberta region more likely to strongly support, while BC most likely to strongly oppose

		Region					
		BC	AB	Prairies	ON	QC	Atlantic
		(N=210)	(N=167)	(N=98)	(N=579)	(N=345)	(N=101)
Pipeline Support	Strongly support	23%	46%	31%	24%	15%	28%
	Somewhat support	30%	20%	24%	27%	25%	26%
	Neither support nor oppose	16%	12%	20%	19%	27%	19%
	Somewhat oppose	10%	7%	6%	7%	13%	8%
	Strongly oppose	15%	6%	4%	7%	4%	7%
	Don't know	7%	8%	14%	15%	17%	12%

Reducing US Dependence: Nearly 2-in-3 agree new pipelines will help reduce US dependency; highest agreement among Conservatives (77%) in Alberta (75%)

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]

It is important to build new oil pipelines as part of our efforts to reduce our dependence on the United States



What About Trump?

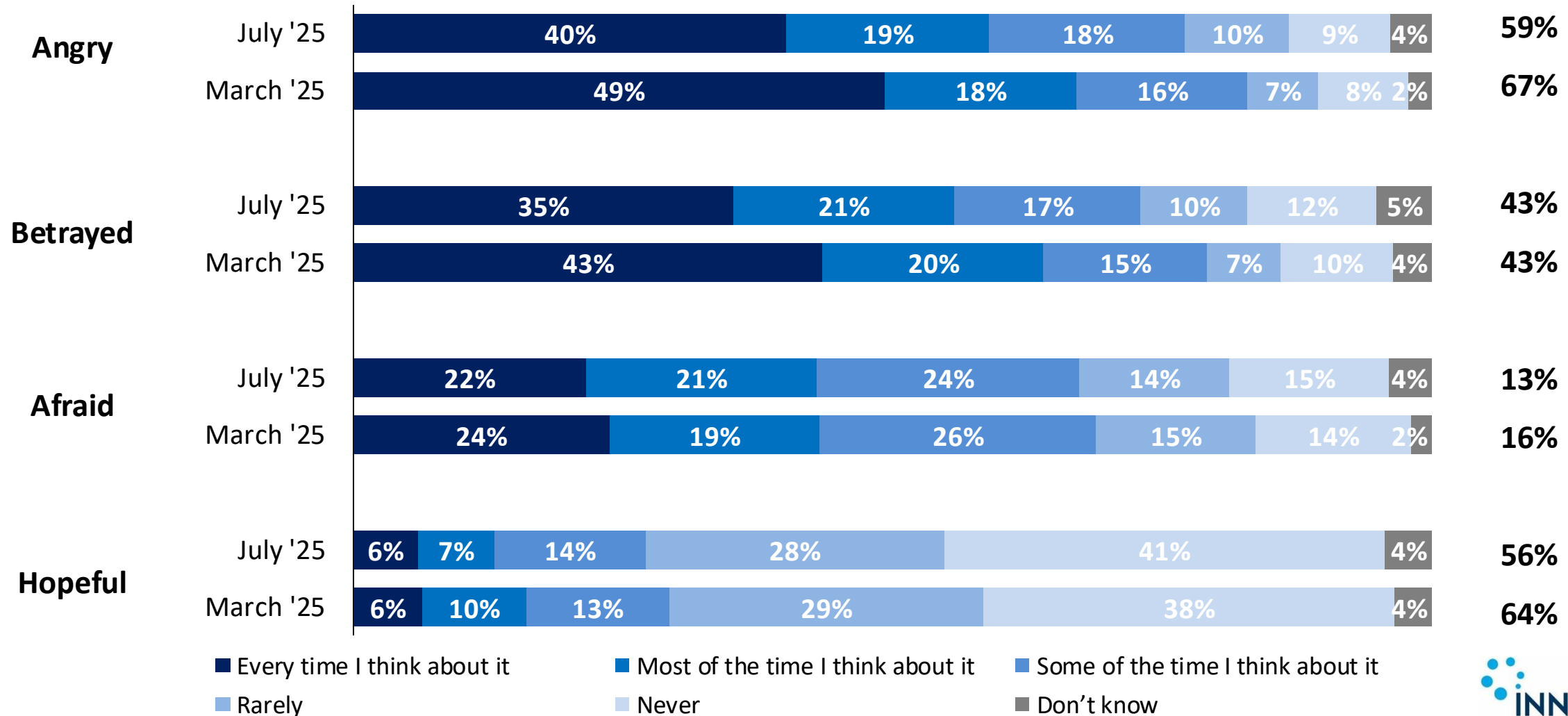
Trump Emotions: Majorities still feel angry and betrayed, although down from March levels

Q

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

[Asked of all respondents; March n=1000; July n=2,000]

**Every time +
Most of the time**



Trump Emotions BY Segmentation: Across segments, Canadians feel angry and betrayed; Men 18-54 feel the most hopeful.

Q

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

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

Every time + Most of the time	Age-Gender					
	M 18-34	M 35-54	M 55+	W 18-34	W 35-54	W 55+
Angry	43%	50%	69%	53%	57%	73%
Betrayed	44%	47%	68%	41%	55%	68%
Afraid	38%	33%	38%	50%	45%	52%
Hopeful	22%	20%	10%	12%	10%	8%

Note: CTM July '25 data

Vote by Age:

Middle-aged are more likely to have voted/would have voted Conservative

Thinking about the choices available in your riding, which party's candidate did you vote for? [Don't know excluded]

[only decided voters; n=1,696]

Vote (Col%)	Age		
	18-34	35-54	55+
	(N=413)	(N=522)	(N=761)
Conservative	38%	47%	37%
Liberal	46%	40%	45%
NDP	8%	6%	6%
Bloc	4%	5%	8%
Green	2%	1%	1%
Other	2%	1%	2%

Note: Current data: April 2025

Dealing with Trump

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

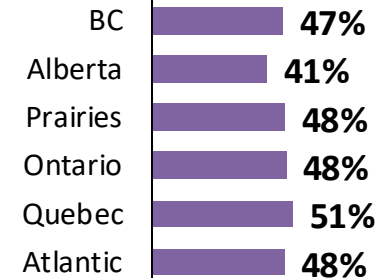
Segmentation

Standing up to bullying approach

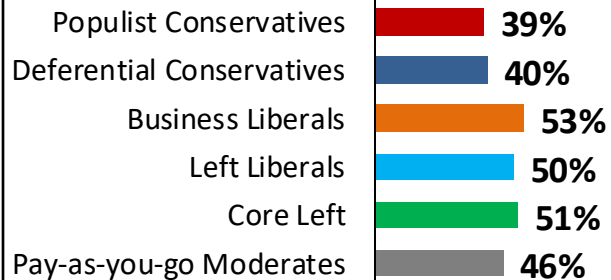
Age/Gender



Region

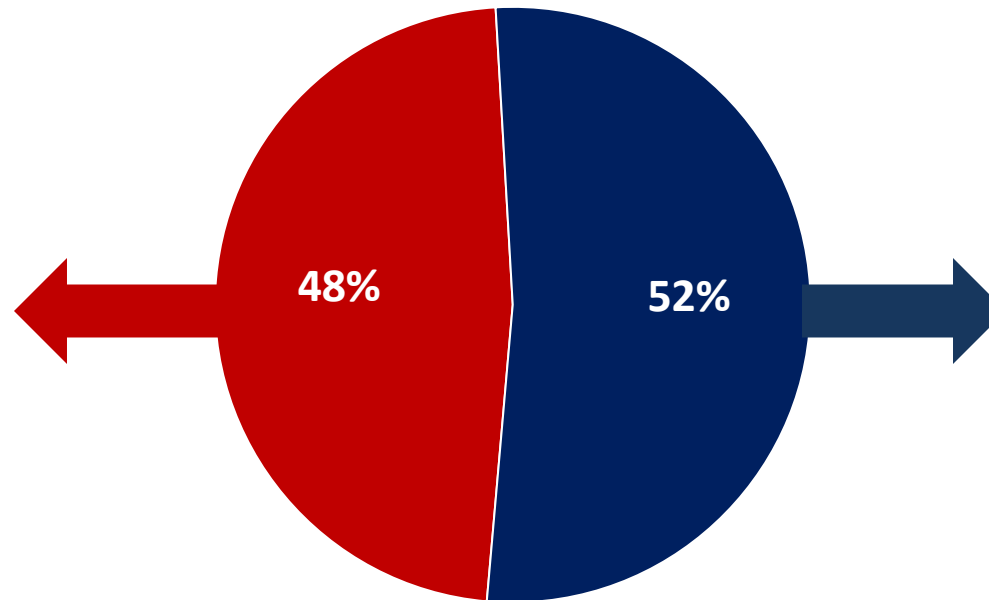


Value Clusters



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

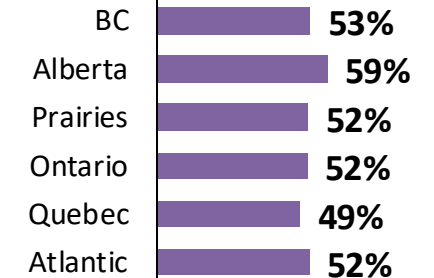
Segmentation

Not getting stuck into unproductive fights

Age/Gender



Region



Value Clusters



Tariff Action

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

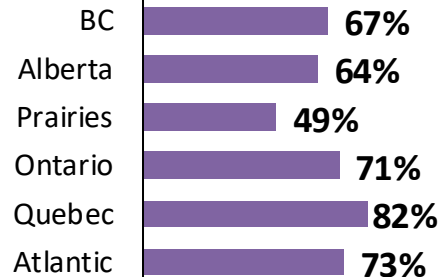
Segmentation

Responding with counter-tariffs

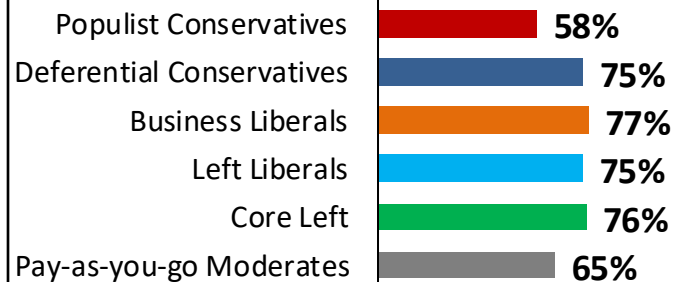
Age/Gender



Region

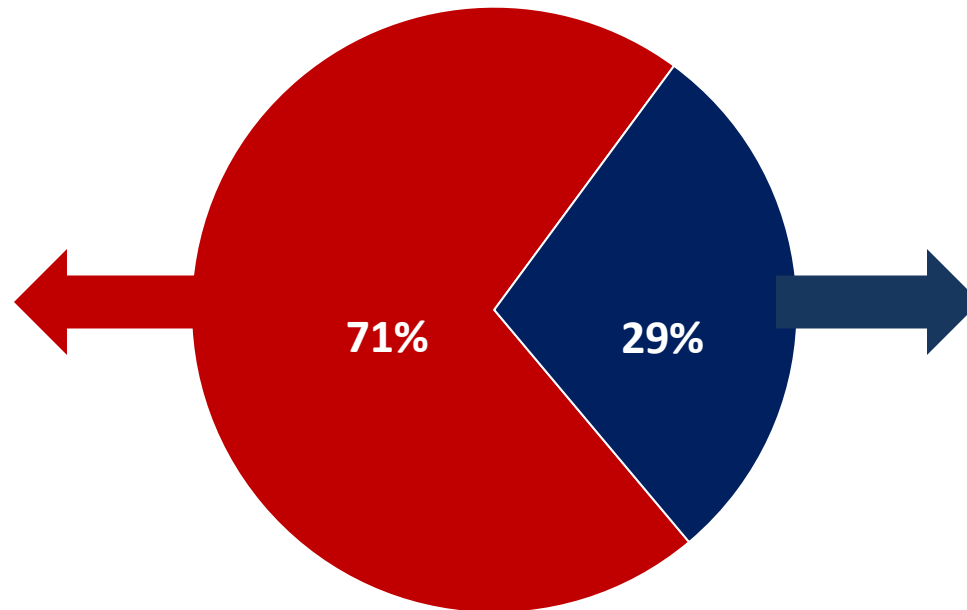


Value Clusters



Which of these two statements is closer to your view:

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

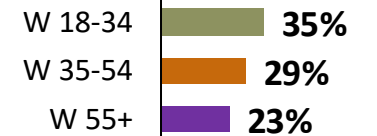


- It is important to respond with counter-tariffs or other action when the Trump administration attacks Canada with tariffs
- There is no reason to engage in tit-for-tat retaliation with the Trump administration on trade, since it just means Canadians pay more

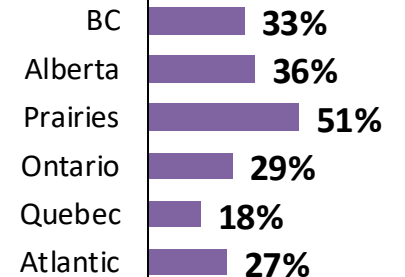
Segmentation

Not engaging in tit-for-tat

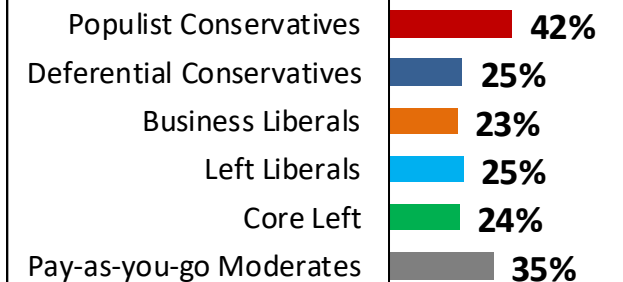
Age/Gender



Region



Value Clusters



Two-Horse Race:

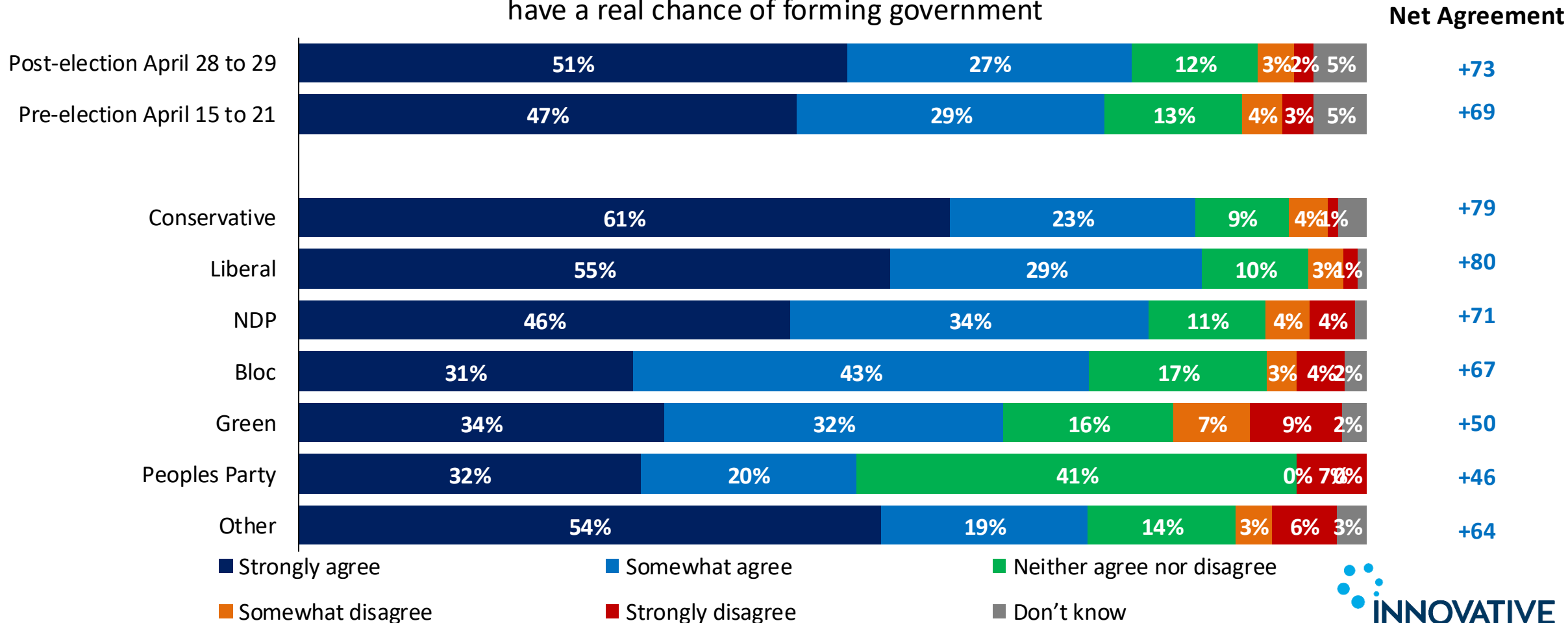
Most Canadians agree this election is a two-horse race; Highest among LPC and CPC identifiers



Do you agree or disagree with the following statements? **BY Vote**

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

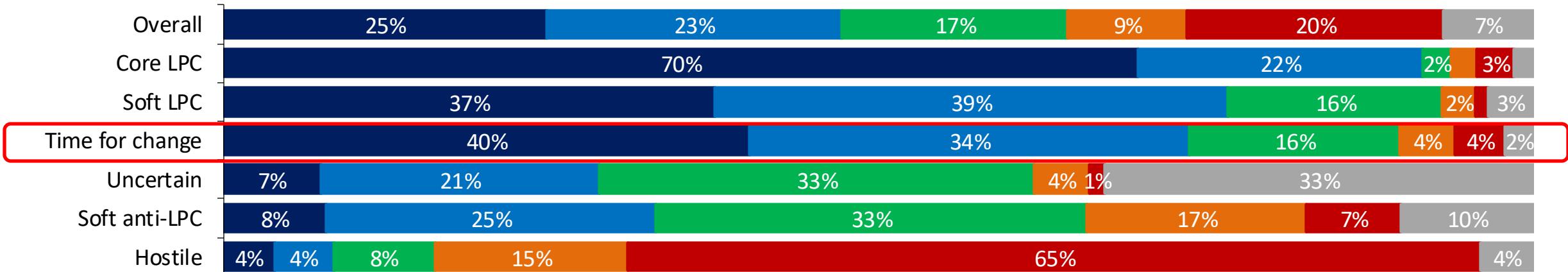
This election is really a **two-horse race**, only the Liberal and the Conservatives have a real chance of forming government



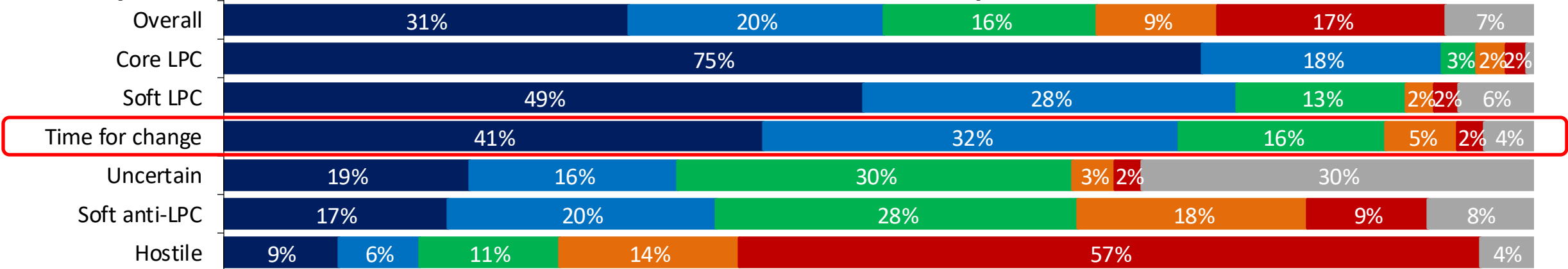
Among this key battleground segment, over 70% agree both that Carney is uniquely equipped and Poilievre is too much like Trump

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



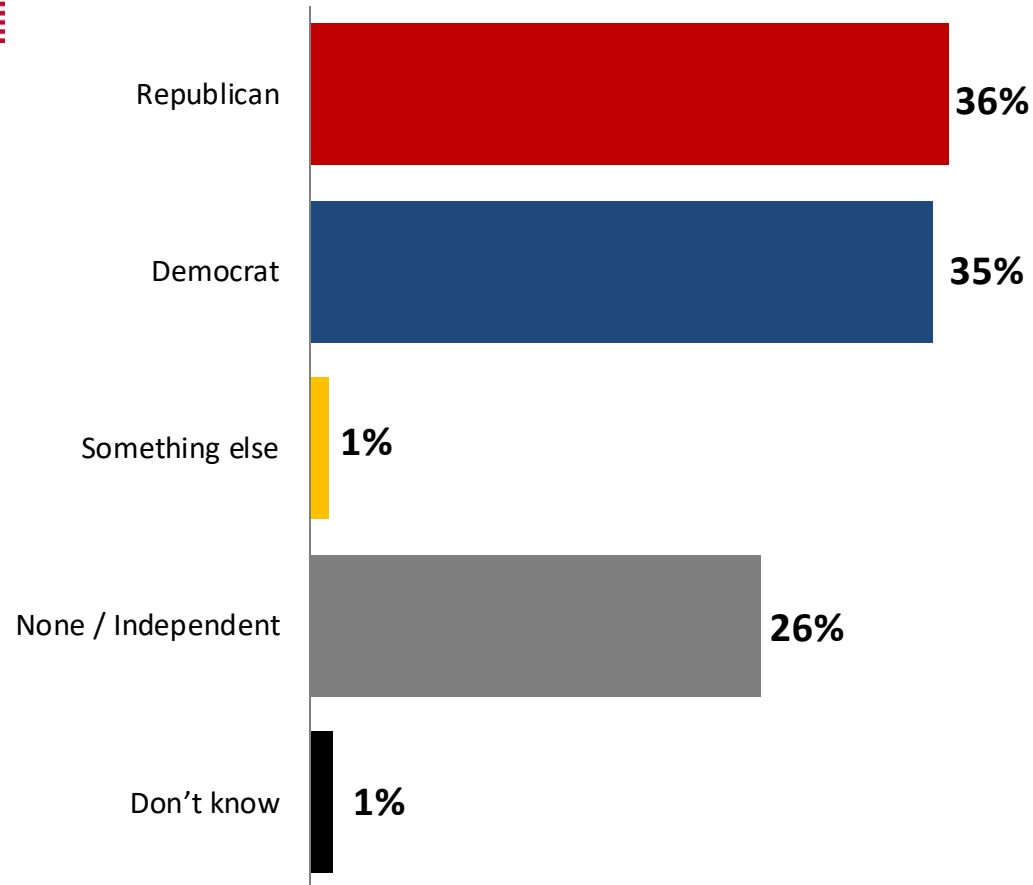
Strongly agree Somewhat agree Neither agree nor disagree Somewhat disagree Strongly disagree Don't know

Where Do We Stand in the US?

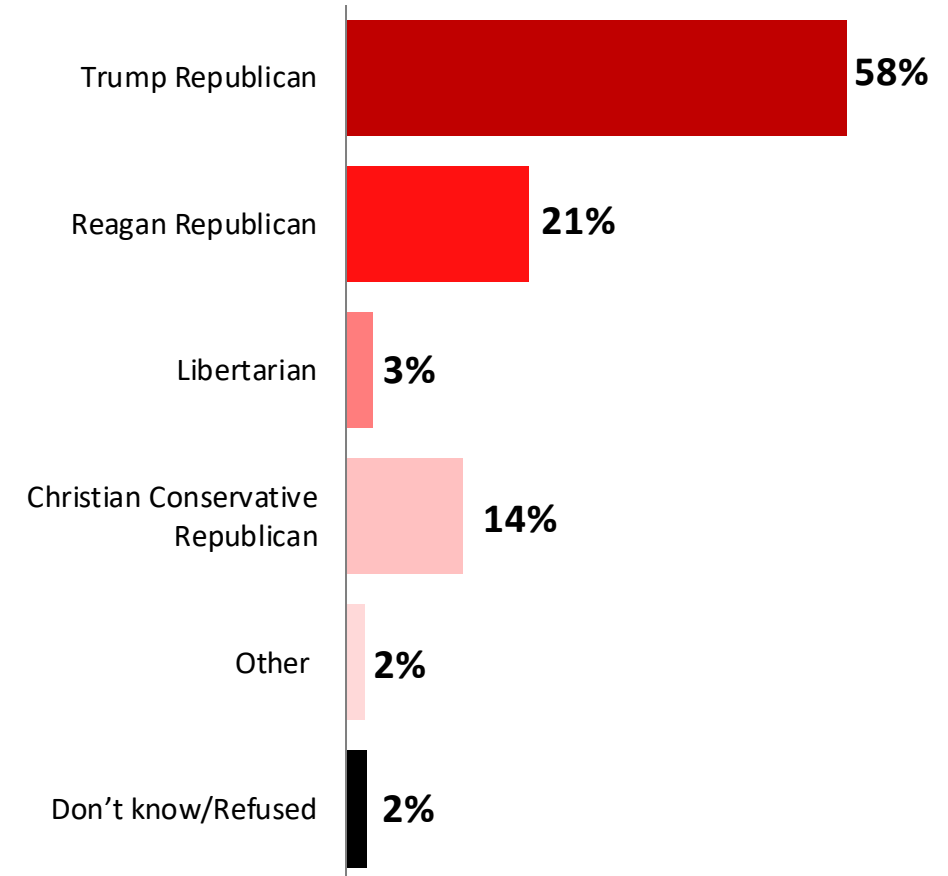
Partisan: 36% of respondents see themselves as Republican, 35% identify as Democrat; 58% of Republican respondents identify as Trump Republicans



Thinking about politics in the United States, generally speaking, do you usually think of yourself as a... [asked of all respondents; n=2,000]

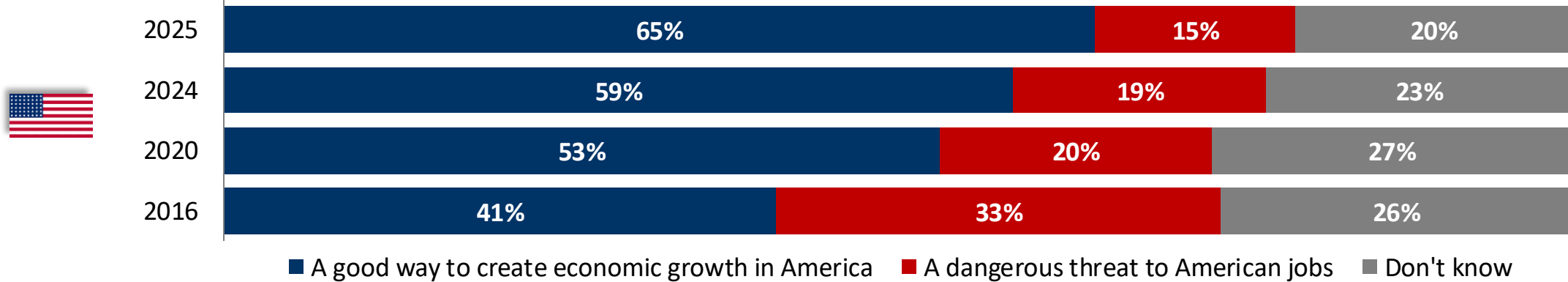


And which of the following kinds of Republican would you say best applies to you [asked of respondents who have heard of the act; United States n=1,664]

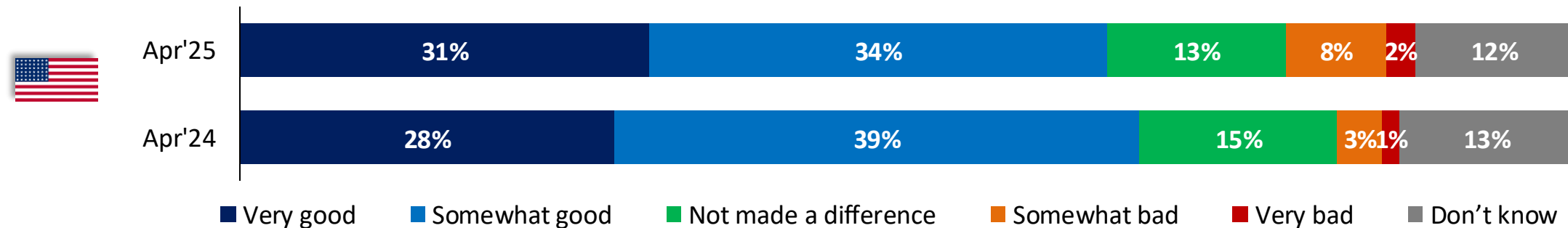


Free Trade: About 2-in-3 (65%) Americans believe FTAs are good for economic growth; 65% think free trade with Canada has been good

Q Which statement is closer to your point of view? **Free trade agreements are...**
[asked of all respondents; United States n=2,000]



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; both increasing from 2024

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=2,000]



June '25



Apr '24



■ Very good ■ Somewhat good ■ Not made a difference ■ Somewhat bad ■ Very bad ■ Don't know

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=2,000]



June '25



Apr '24

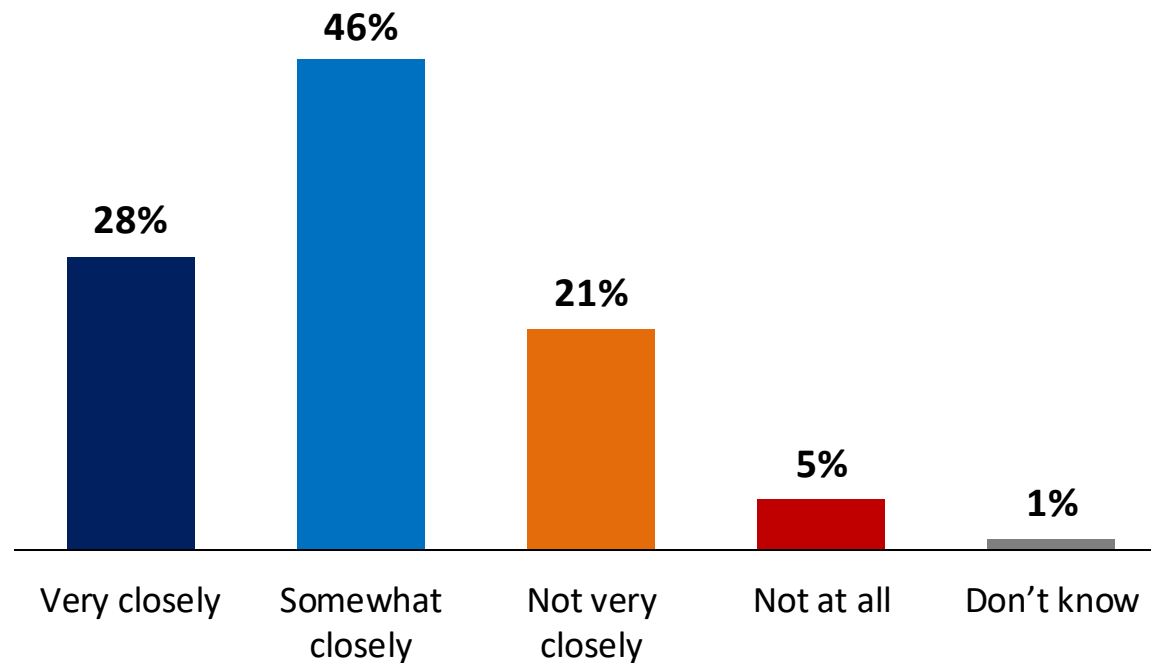


■ Very good ■ Somewhat good ■ Not made a difference ■ Somewhat bad ■ Very bad ■ Don't know

Federal Read, Seen, Heard: 73% of Americans closely follow the news about tariff policies; 35% have a very negative reaction to them

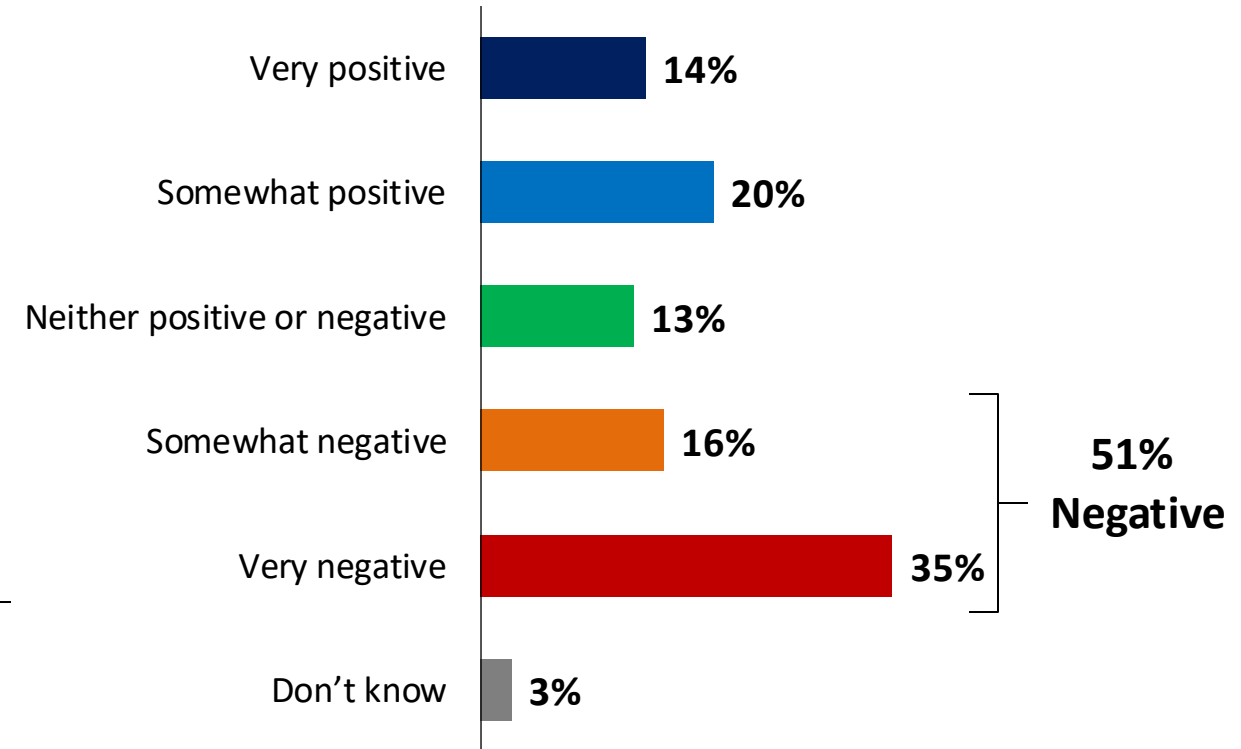
Q How closely are you following the news about President Trump's tariff policies?

[Asked of all respondents; United States n=2,000]



Q 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=2,000]

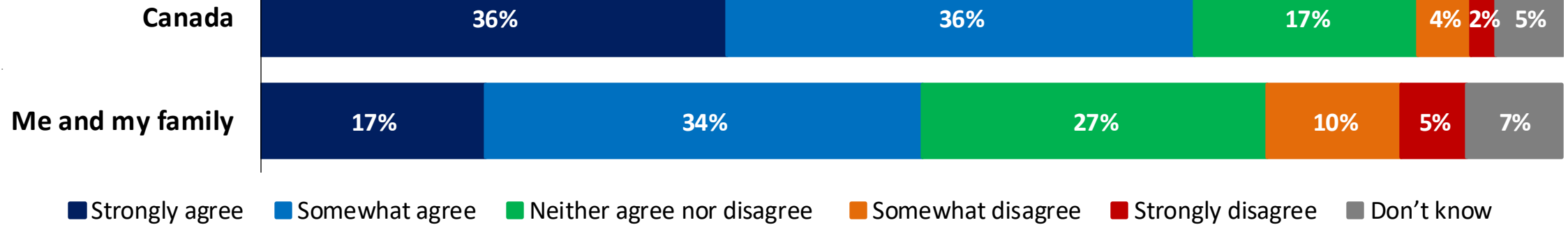


Impact of Tariffs: 72% of Canadians and 53% of Americans think Trump's trade policies will have a serious impact on their countries



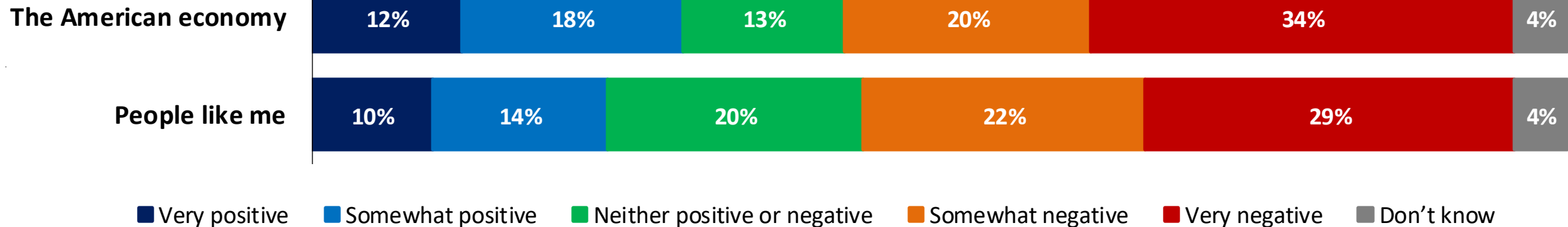
Do you agree or disagree with the following statements? *The Trump Administration's trade policies will have a serious impact on...*

[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=2,000]



Tariffs BY Voting Habits: Nearly 3-in-4 Republicans say tariffs will benefit America long-term; highest among Trump/Christian Republicans⁴⁴

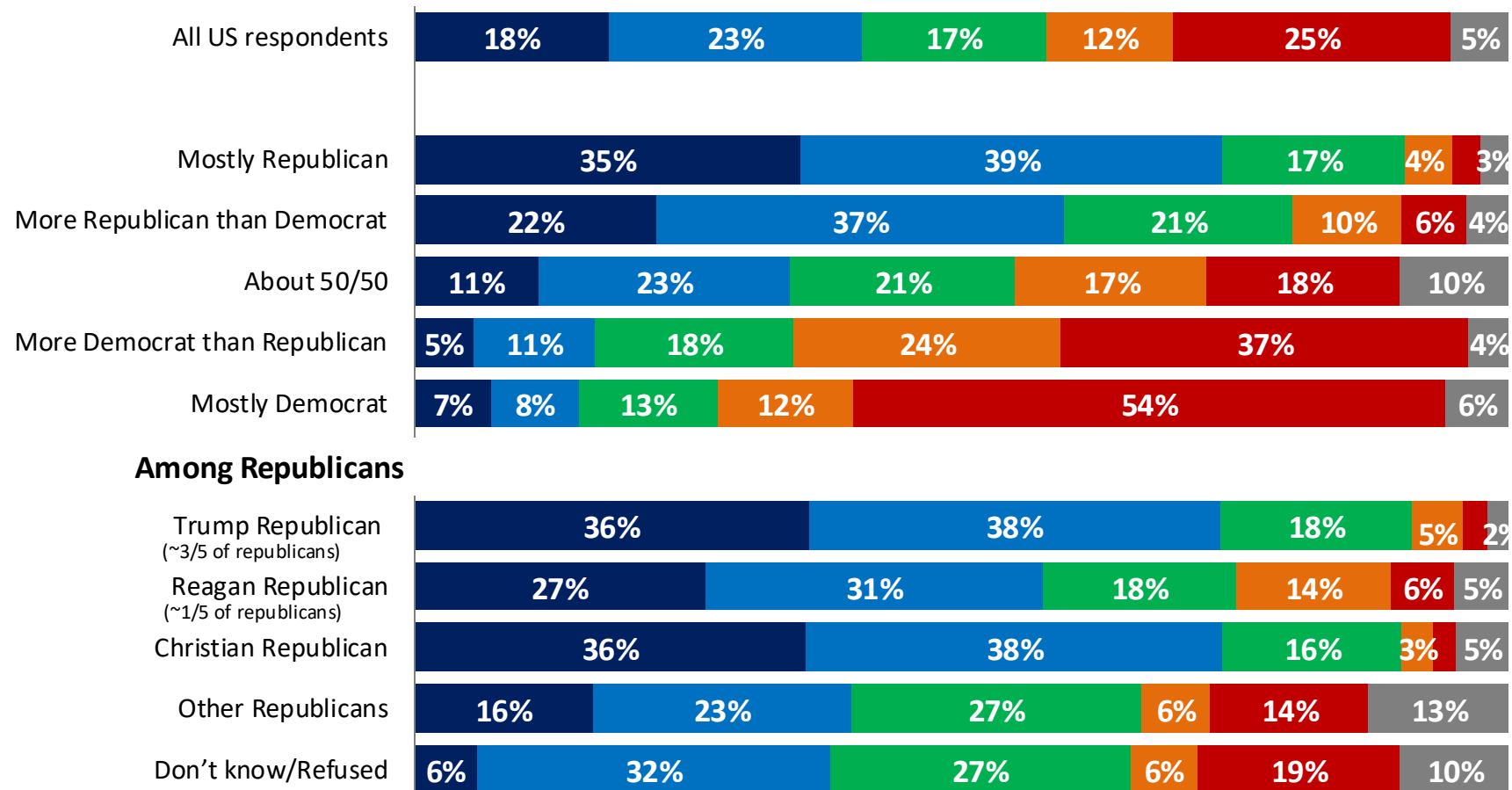


Would you agree or disagree with the statement that “Tariffs will hurt in the short run but are good for America in the long run”?

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



“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

What About Electricity?

Electricity Bill:

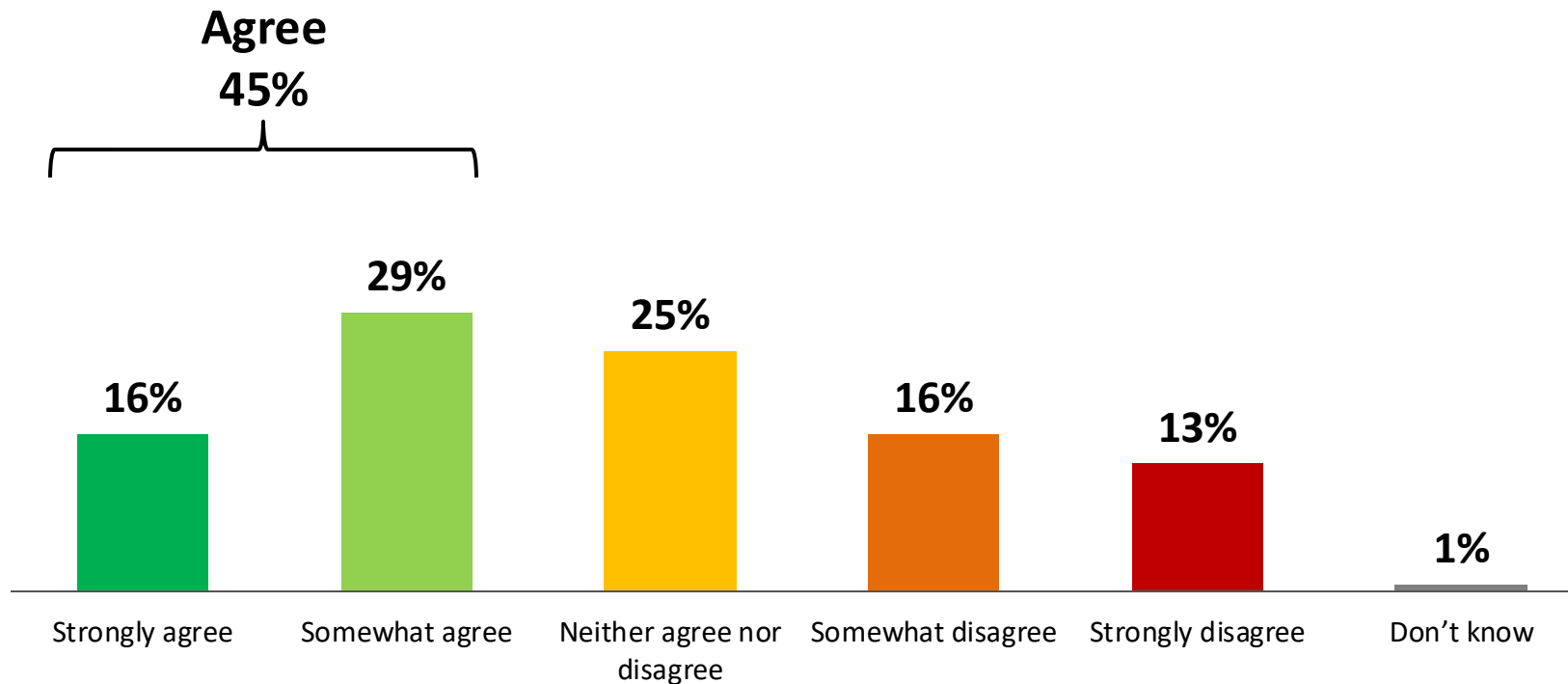
45% agree their electricity bill significantly impacts their finances; higher among younger Canadians

Q

Do you agree or disagree with the following statement?

My electricity bill has a major impact on my finances and requires I do without other important priorities

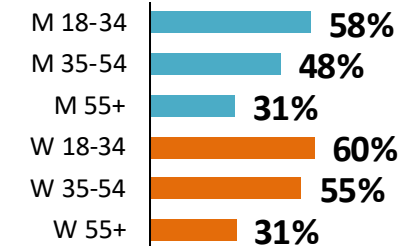
[asked of all respondents; n=2,000]



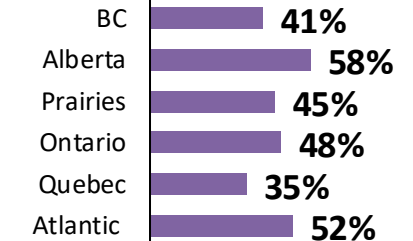
Segmentation

Those who say 'agree'

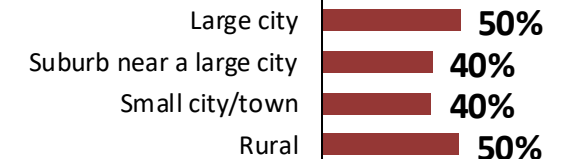
Age-Gender



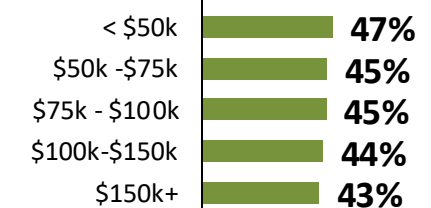
Region



Community Type



Income



Electricity Service:

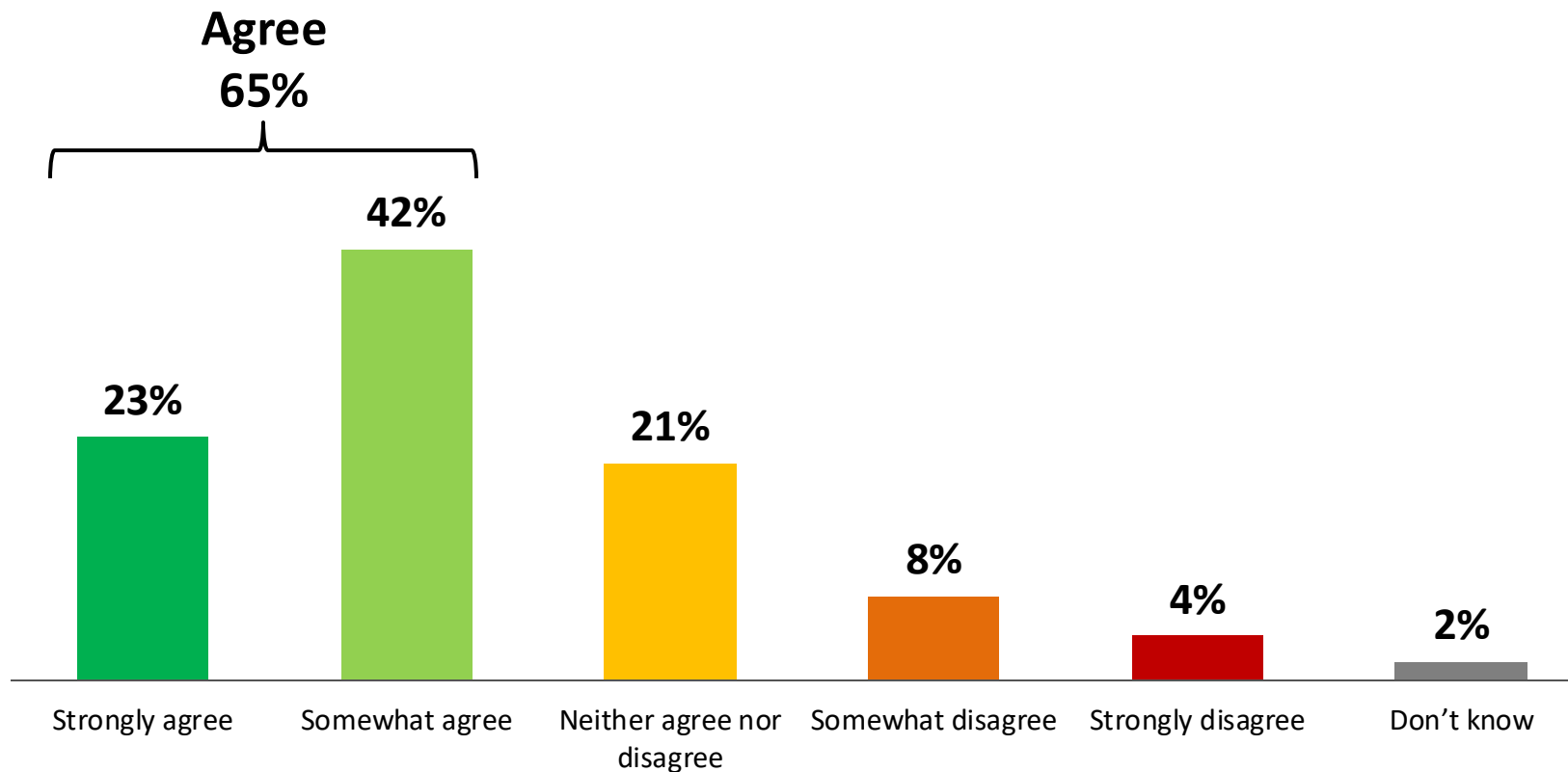
65% agree their province's electricity system serves them well



Do you agree or disagree with the following statement?

Customers are well served by the electricity system in [PROVINCE].

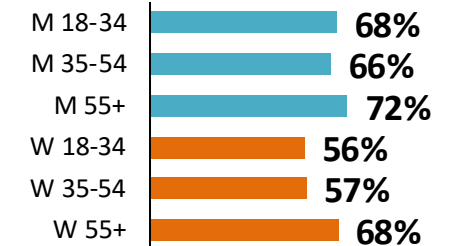
[asked of all respondents; n=2,000]



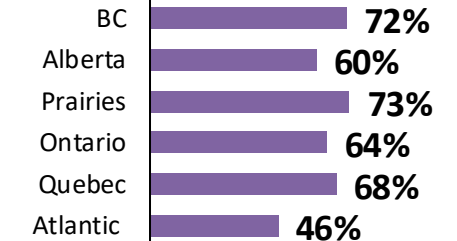
Segmentation

Those who say 'agree'

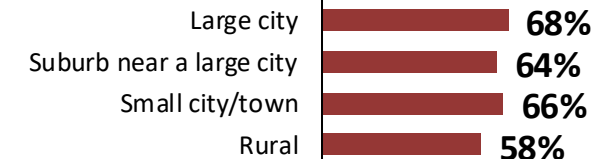
Age-Gender



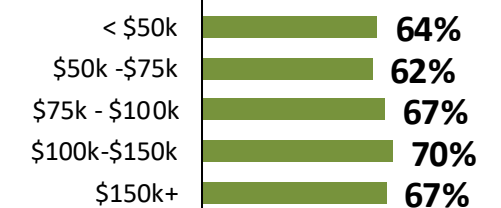
Region



Community Type



Income



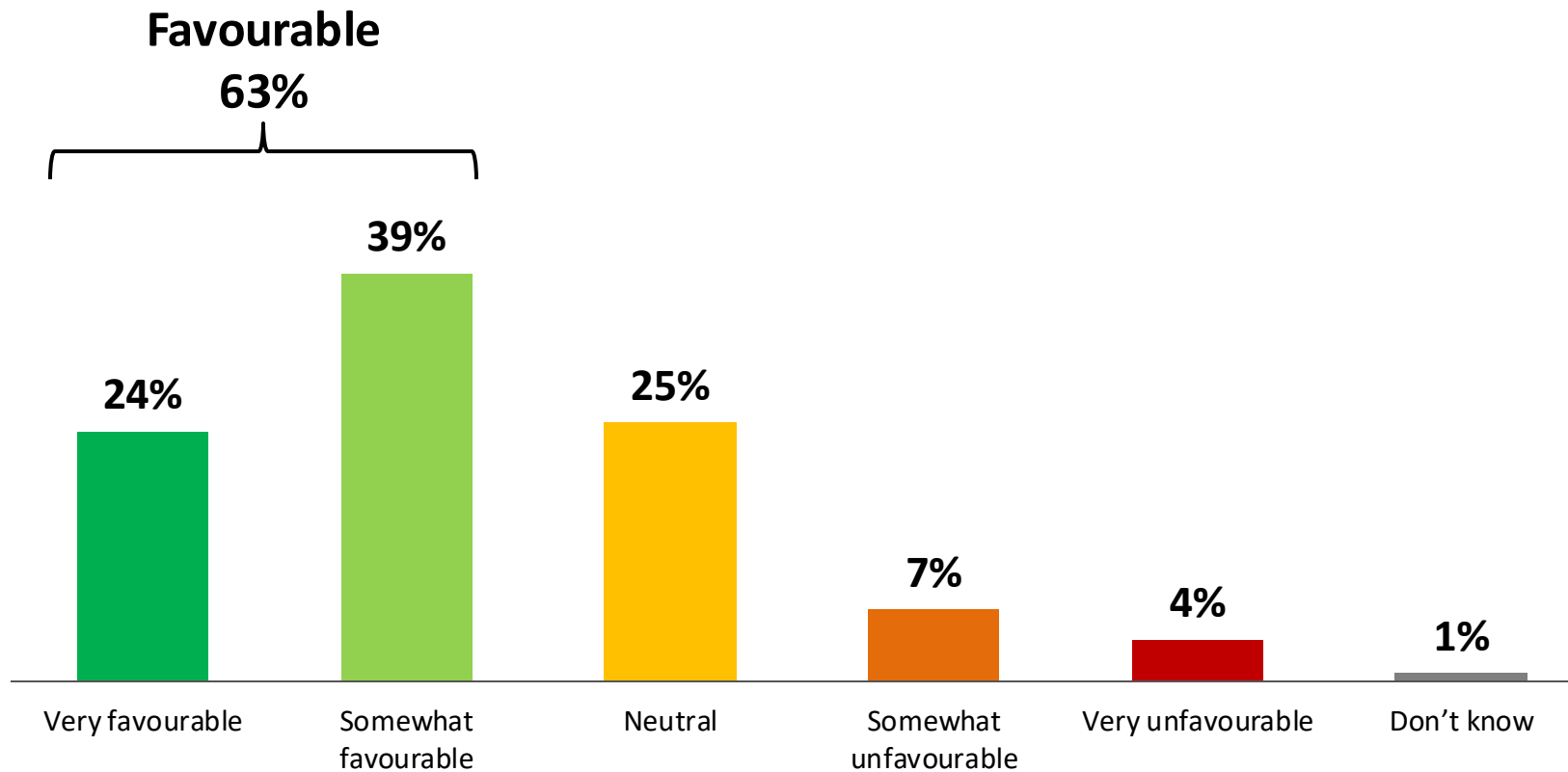
Utility Impression:

63% favorable impression of their electricity provider; highest in large cities vs. lowest in rural areas



Thinking about the company that sends you your electricity bill, would you say your overall impression of this company is....

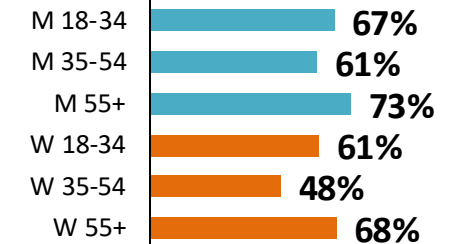
[asked of all respondents; n=2,000]



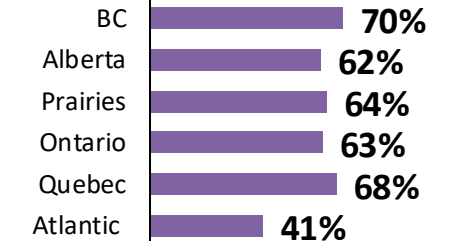
Segmentation

Those who say 'favourable'

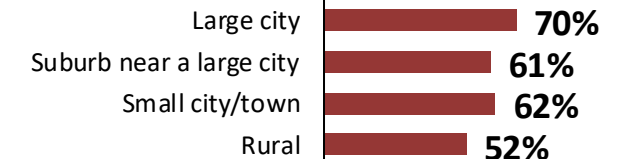
Age-Gender



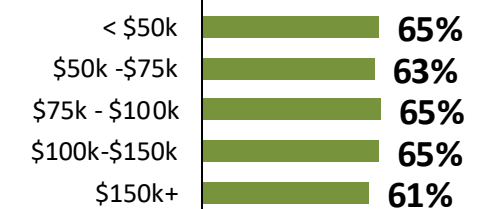
Region



Community Type

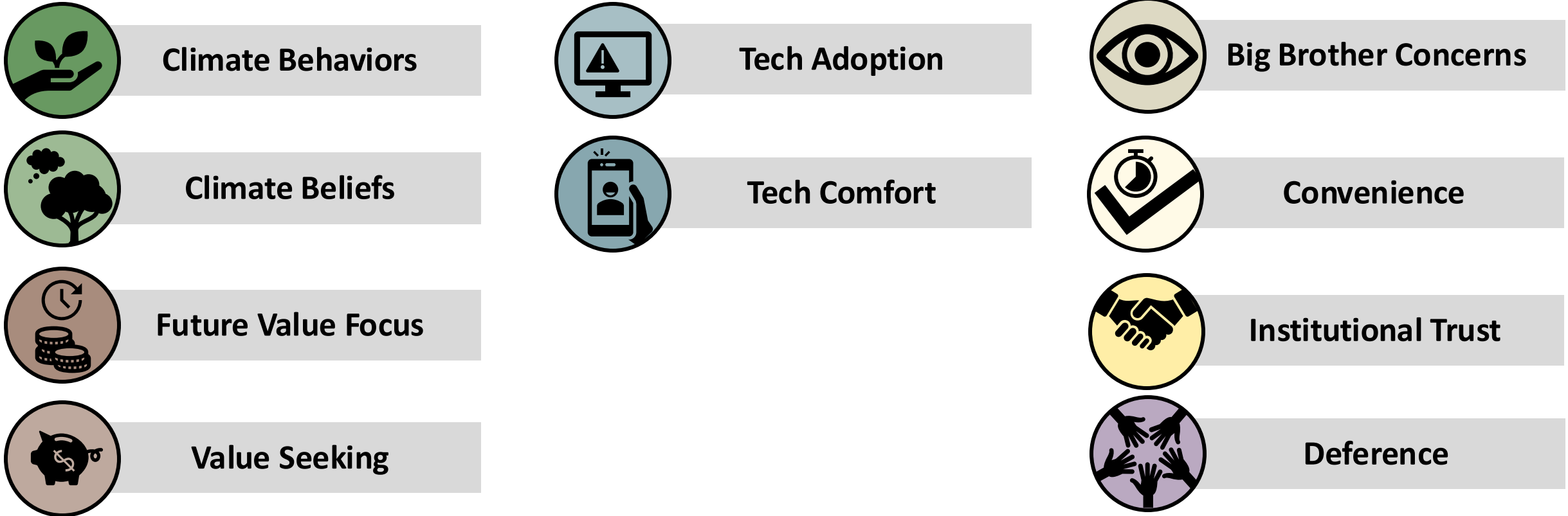


Income



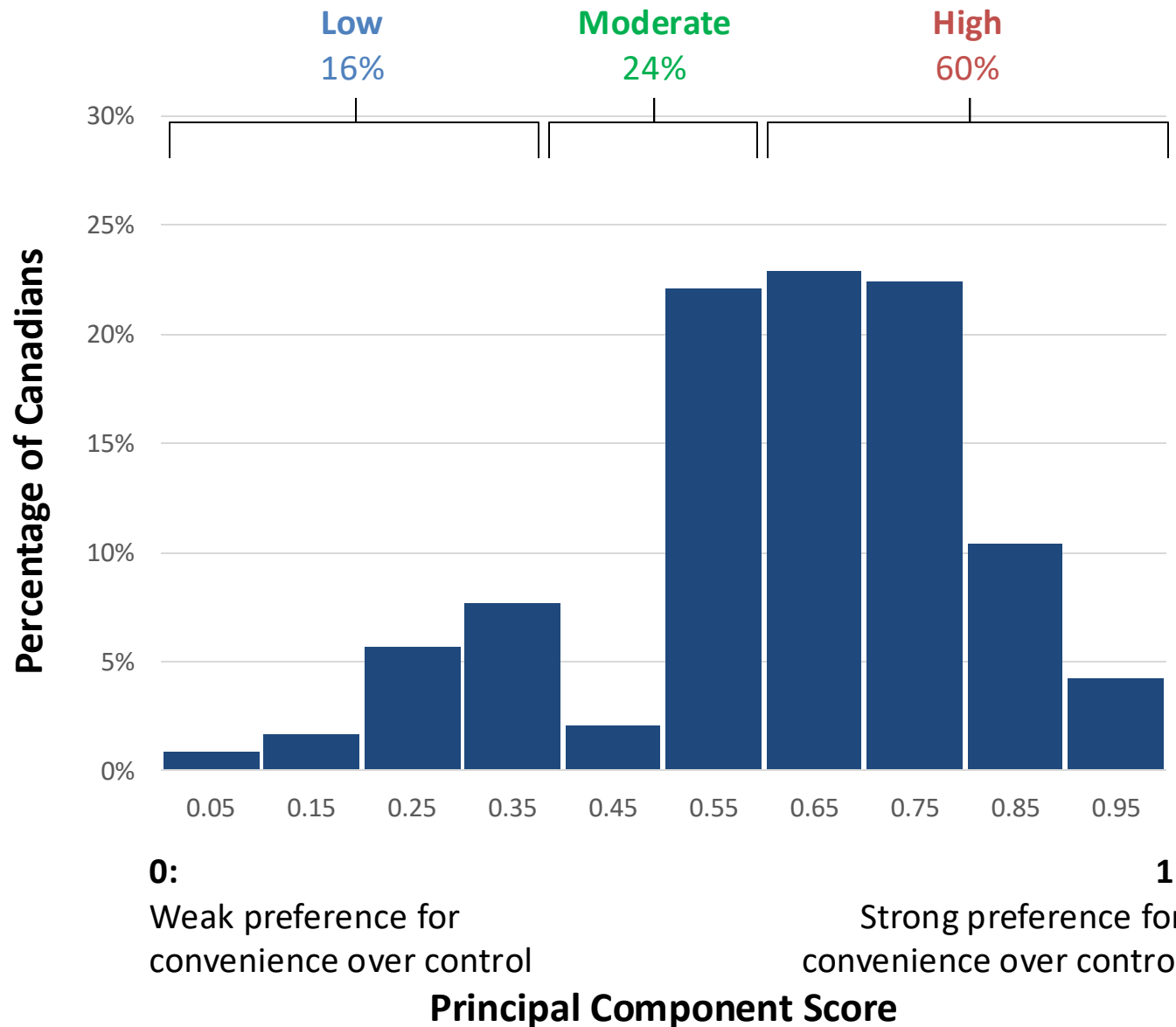
Underling Dimensions

Our analysis indicates that the 22 motivational items we included in our model boiled down to ten underlying dimensions.



Convenience:

Canadians tend to prefer convenience over control



Convenience Dimension

This dimension is based on how strongly people agree with two statements*:

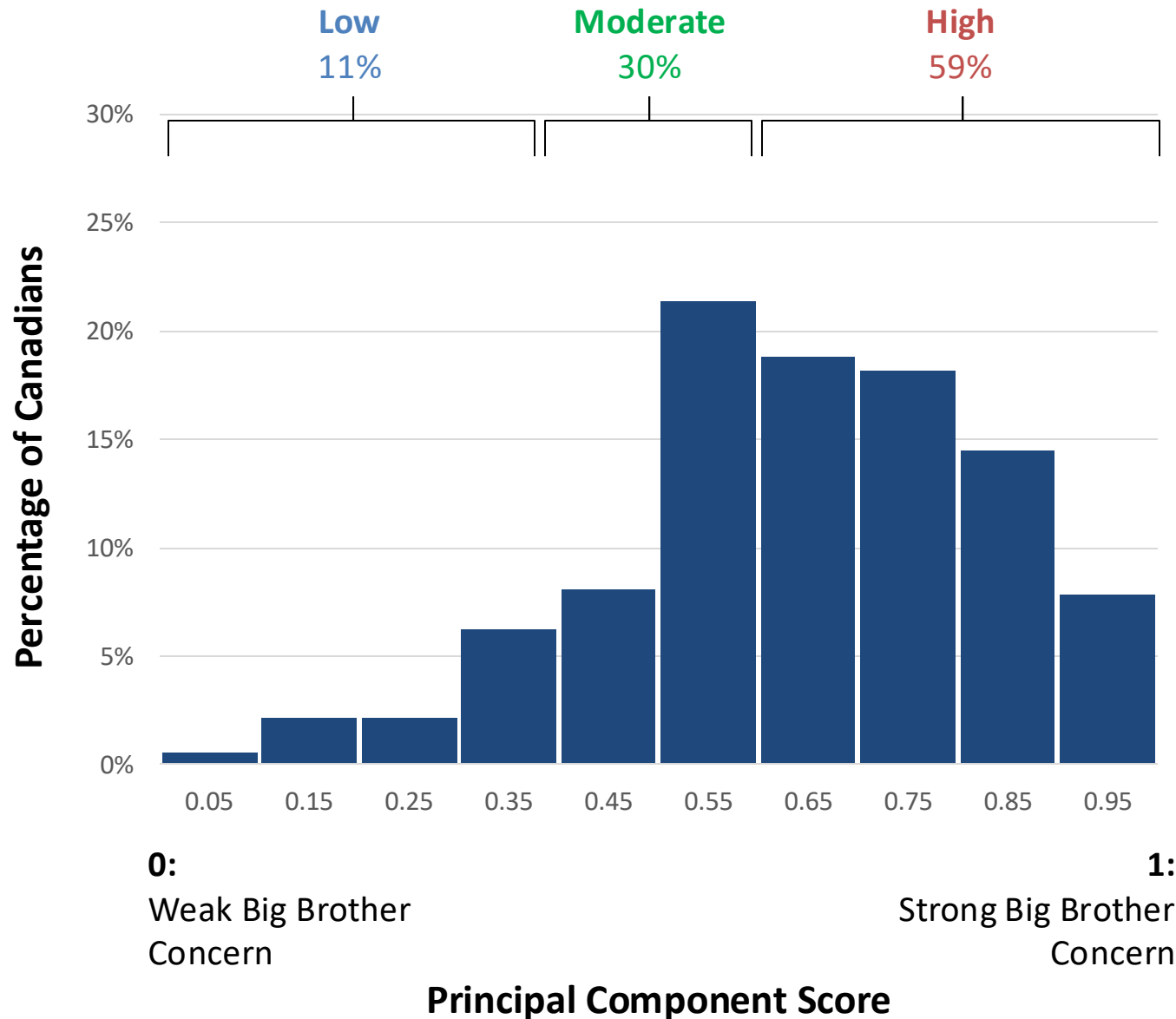
- “I value convenience more than being fully in control of every decision” and
- “I would rather set things up once and let them run automatically, instead of having to manage them myself.”

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note:** Three variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Big Brother Concern:

But Canadians are concerned about control and decision-making by technology



Big Brother Concern Dimension

This dimension is based on how strongly people agree with two statements*:

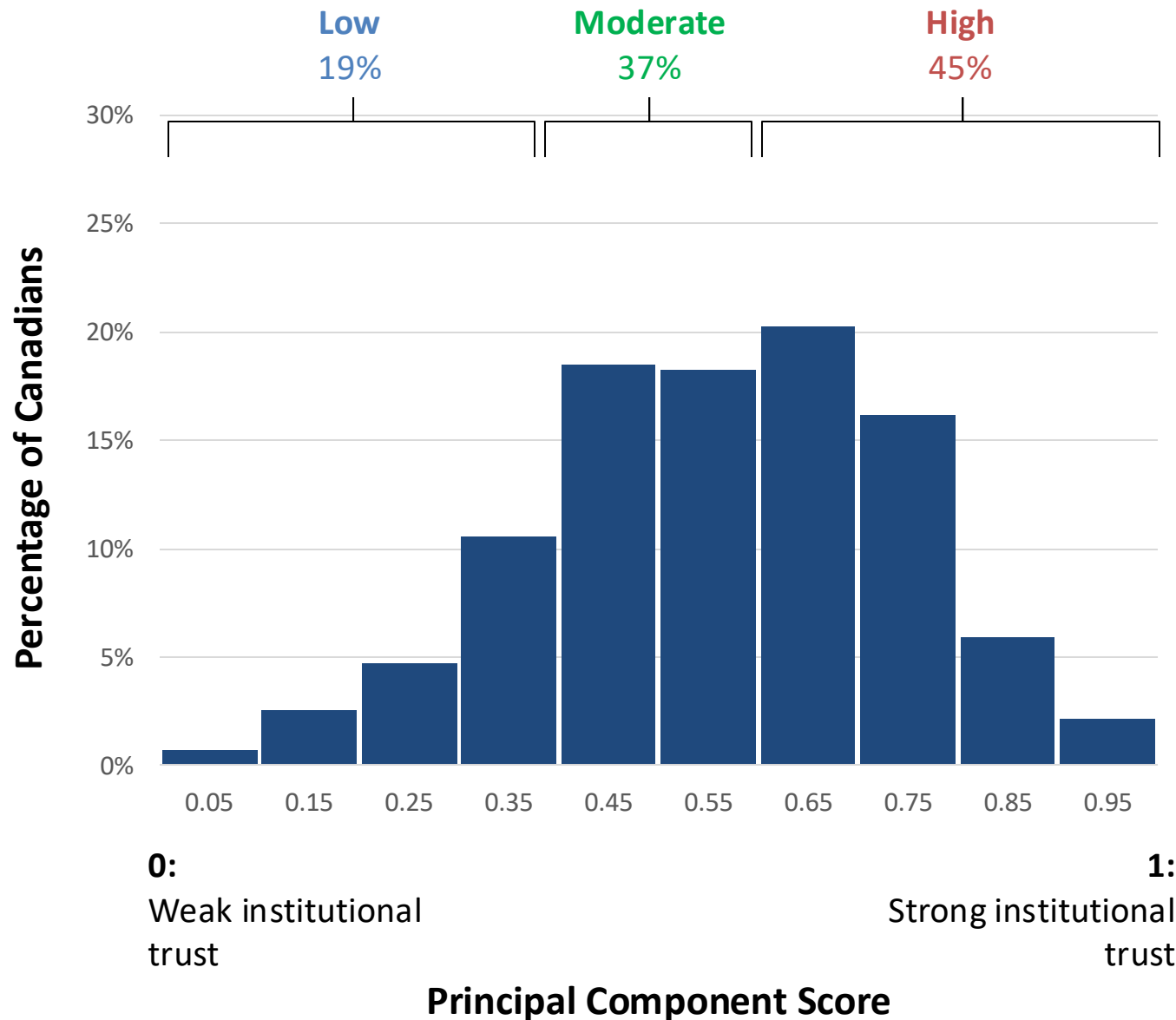
- “I do not like the idea of companies or organizations controlling things in my home” and
- “It bothers me when I feel that technology is making decisions on my behalf.”

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note:** Three variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Institutional Trust:

Canadians tend to trust institutions



Institutional Trust Dimension

This dimension is based on how strongly people agree with two statements*:

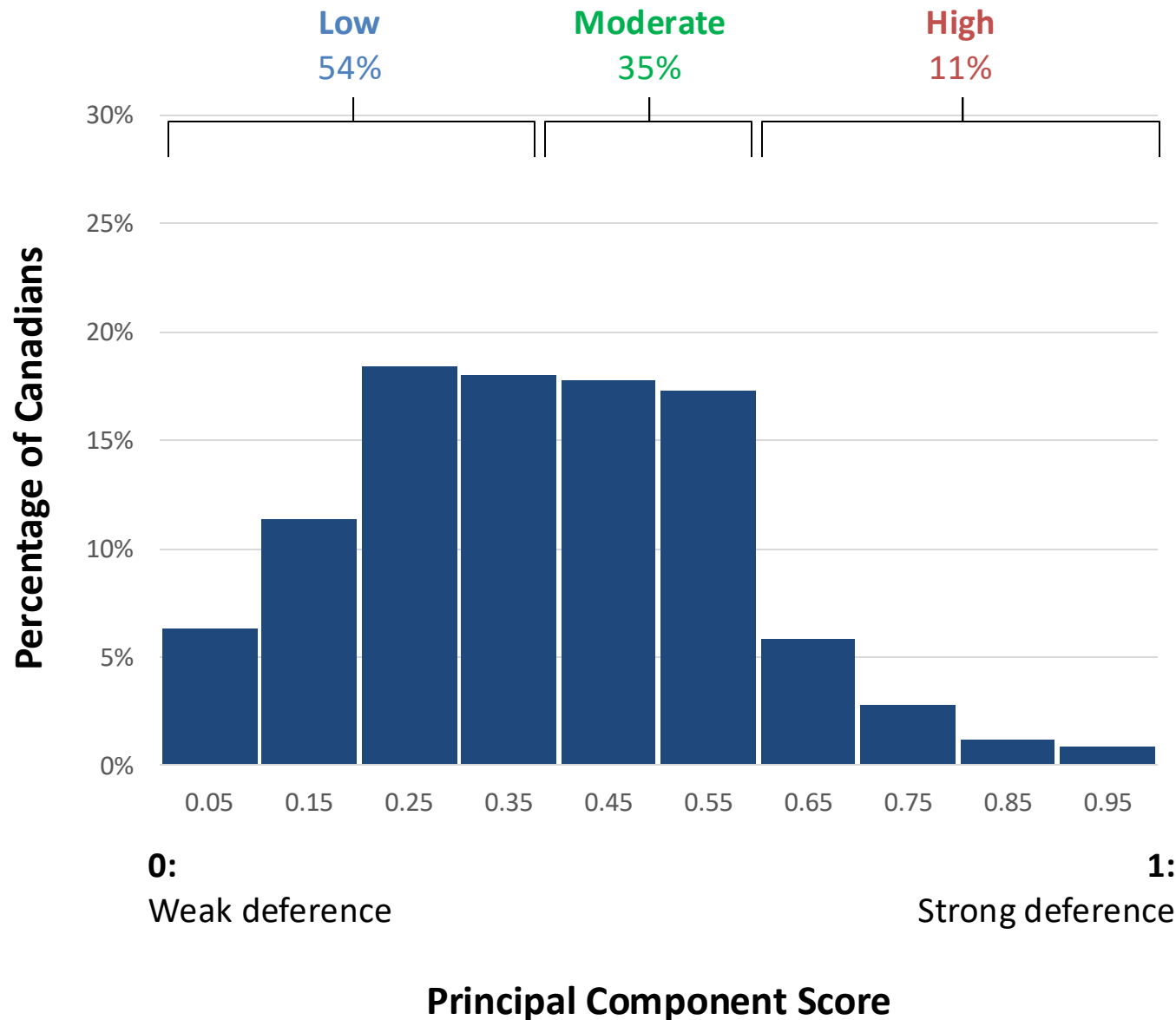
- “I usually follow recommendations from government or other authorities when deciding what to do” and
- “I believe organizations generally act in the best interest of society.”

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

* **Note:** Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Deference:

... but Canadians tend not to be deferential



Deference Dimension

This dimension is based on how strongly people agree with two statements*:

- “I prefer to make up my own mind, even if it means going against official advice” [Reverse-coded] and
- “I sometimes worry that big organizations or government want too much control over people’s lives.” [Reverse-coded]

Those with a score of at least 0.4 are labelled **Low**, those with a score above 0.6 are labelled **High**, and those in the middle are labelled as **Moderate**.

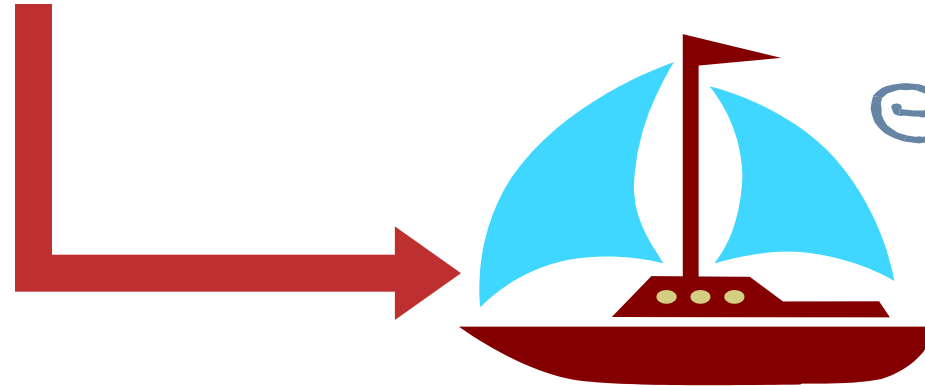
* **Note:** Four variables were included in the PCA, but we report the two variables that contribute the most to the PC here.

Define or Be Defined

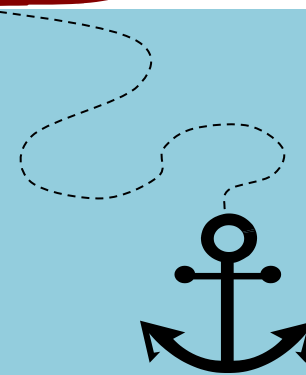
How Opinions Form and Change

High Engagement

The Little Red Boat is affected by the winds of public debate and the current of underlying change.



it's affected by the winds
= Public Debate



Anchors
= Values

Low Engagement

Framing Is Critical

<https://archive.org/details/leading-questions-yes-prime-minister>

Where does this leave us?

- 1. We live in time driven by deep emotions.**
- 2. Energy issues can easily evoke those emotions.**
- 3. Will you react to events or drive events?**



For more information, please contact:

Greg Lyle

President

(416) 642-6429

glyle@innovativeresearch.ca

Building Understanding.