

THE NEW CANADIAN POLITICAL LANDSCAPE

Lord Ashcroft KCMG PC
October 2026



Lord Ashcroft Polls
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METHODOLOGICAL NOTE

10,098 adults in Canada were interviewed online between 31 July and 17 August 2026. Results have been weighted to be representative of all adults in Canada. Full data tables are available at LordAshcroftPolls.com

Sixteen focus groups were held between 27 July and 7 August 2026 in British Columbia, Alberta, Quebec and Ontario. Participants were drawn from a range of social, ethnic and political backgrounds, and included both French and English speakers. The research included equal numbers of men and women.

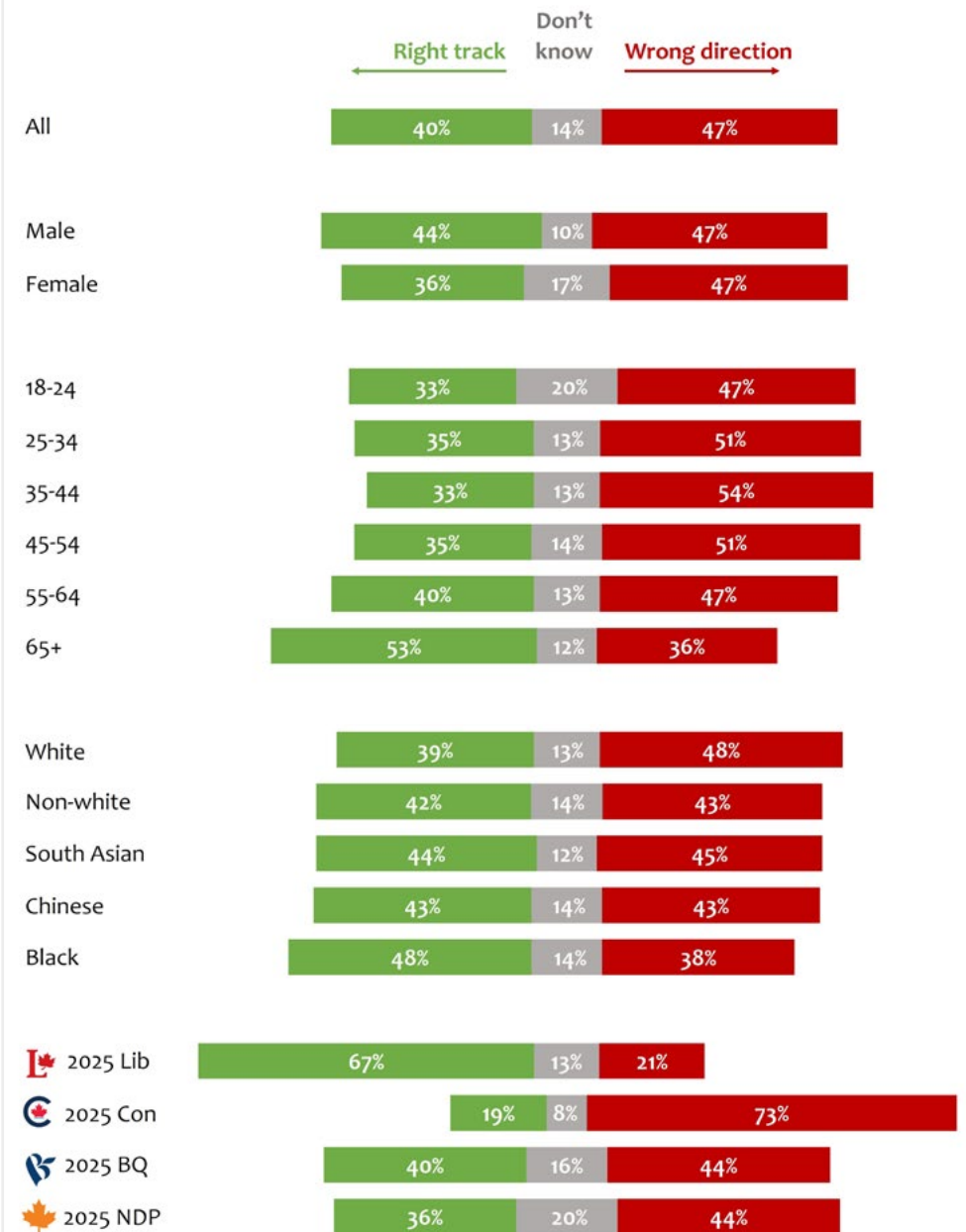


THE STATE OF THE NATION

RIGHT TRACK OR WRONG DIRECTION?

Canadians said the country was **heading in the wrong direction**, by a seven-point margin. Just over two thirds of 2025 Liberal voters said Canada was on the right track, with just under three quarters of Conservative voters taking the opposite view. Those aged 65 or over were the only age group more likely than not to say the country was on the right track. Men were more upbeat than women, and non-white Canadians more positive than whites; black respondents were the demographic group most likely of all to say Canada was heading in the right direction.

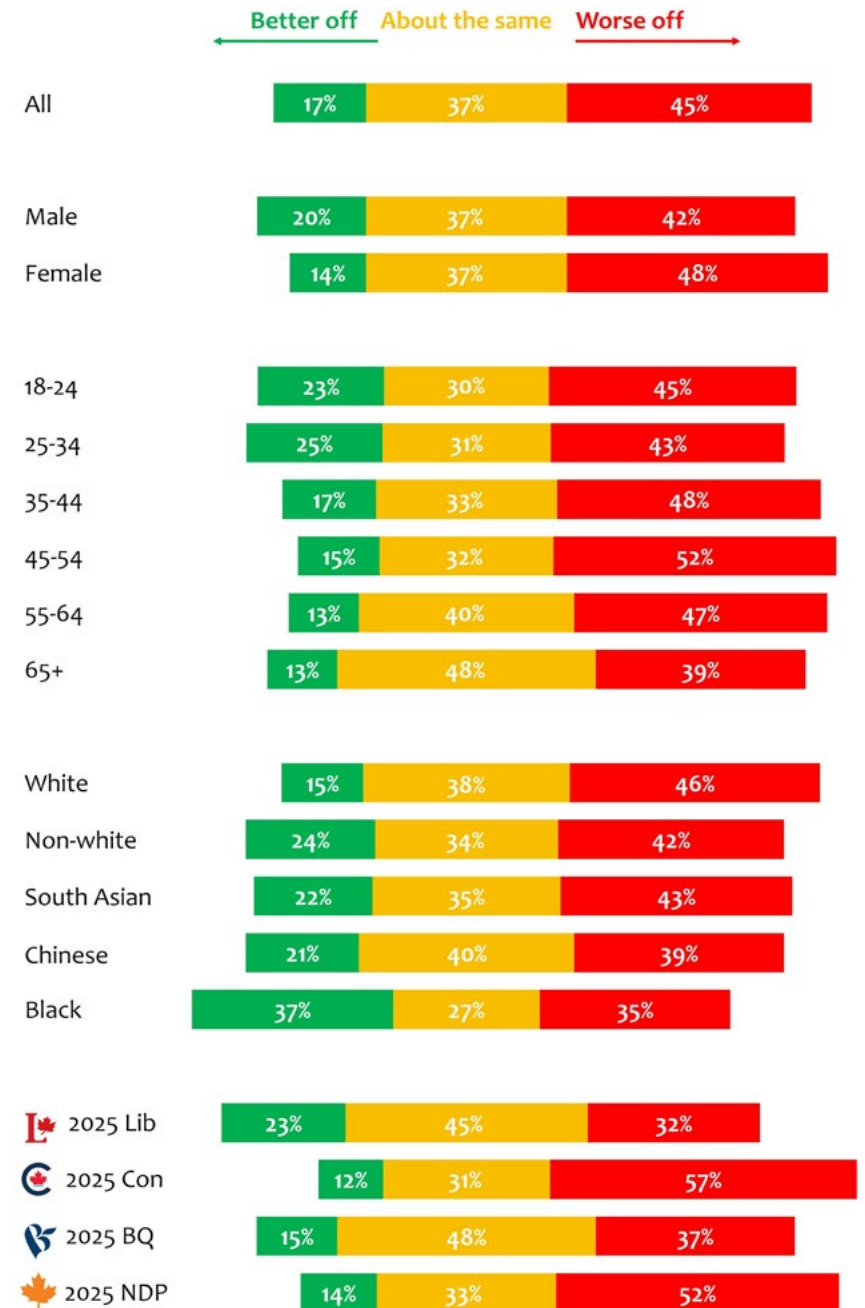
Do you think Canada today is on the right track, or is it heading in the wrong direction?



BETTER OR WORSE OFF?

Compared to a year ago, Canadians said they felt **worse off rather than better off** by 45% to 17%, with 37% saying they felt about the same. Younger voters and those who voted Liberal in 2025 were the most likely to say they felt better off, with Conservatives, NDP voters and those aged 45-54 the most likely to say the opposite. Black Canadians were again the most positive, being the only group more likely to say they are better off than the opposite.

Do you feel better or worse off than you did a year ago, or about the same?

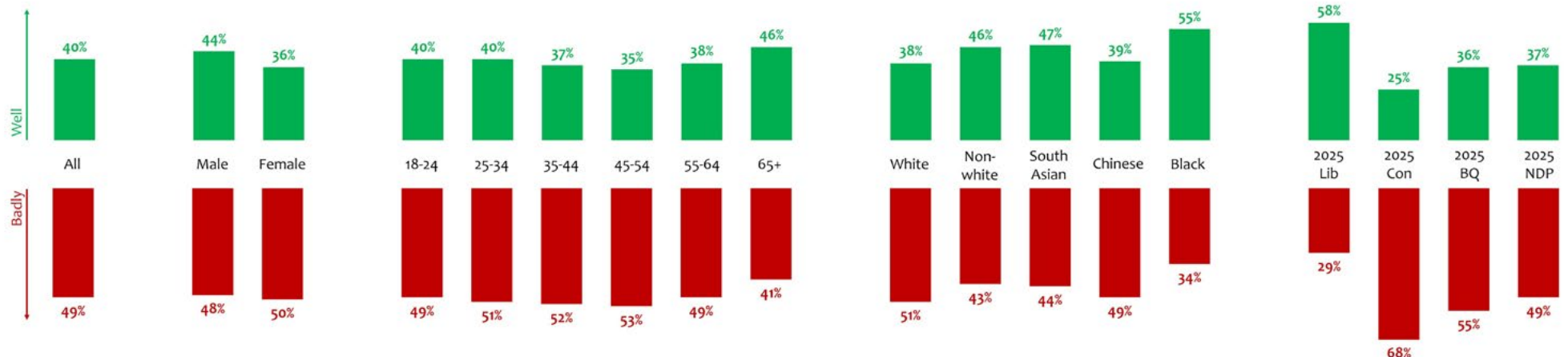


ECONOMIC OPTIMISM

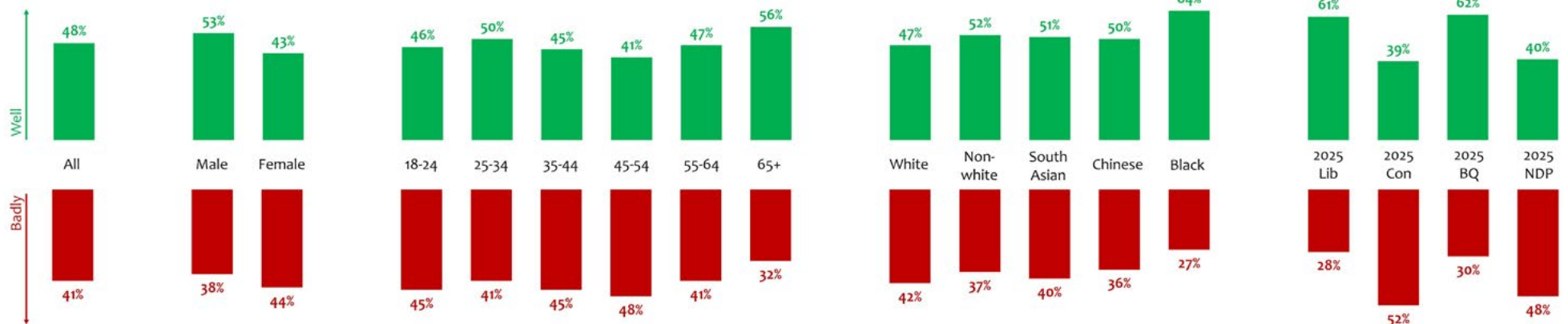
Respondents were more likely to say they expected the **Canadian economy over the next year to fare badly** for the country as a whole rather than well. However, the reverse was true when we asked how the economy would fare for them personally. All groups were more optimistic about the economy for themselves than for Canada as a whole.

How do you think the Canadian economy over the next year will fare for...

... Canada as a whole?



... you personally?



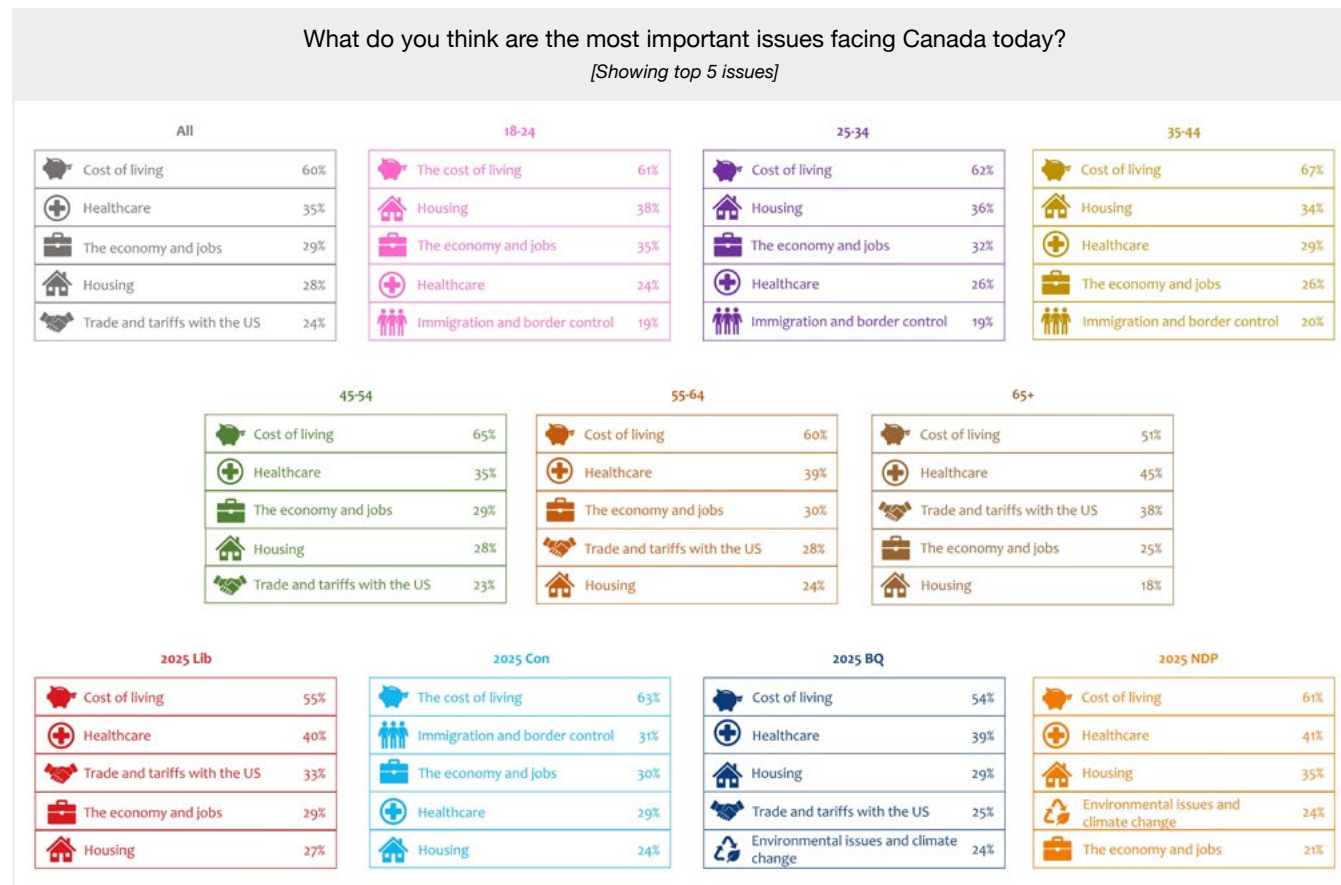
ISSUES AND POLICIES

MOST IMPORTANT ISSUES

The cost of living was chosen as the **most important issue facing Canada** across age groups and party supporters, but there was some variation between other issues of concern. Housing was the second most important issue for voters up to the age of 44, replaced by healthcare for those aged 45 and over. Healthcare was also in second place for 2025 Liberal, BQ and NDP voters, while Conservative voters were more likely to name immigration and border control and the economy and jobs (the latter also taking third place for voters up to the age of 34). US tariffs and trade were among the top four for Liberal and BQ voters, and climate change and the environment were in the top five for those who had voted BQ or NDP.

Women were notably more likely than men to choose the cost of living (by 64% to 56%) and healthcare (by 39% to 30%), while men were slightly more likely to choose the economy, tax, government borrowing and tariffs.

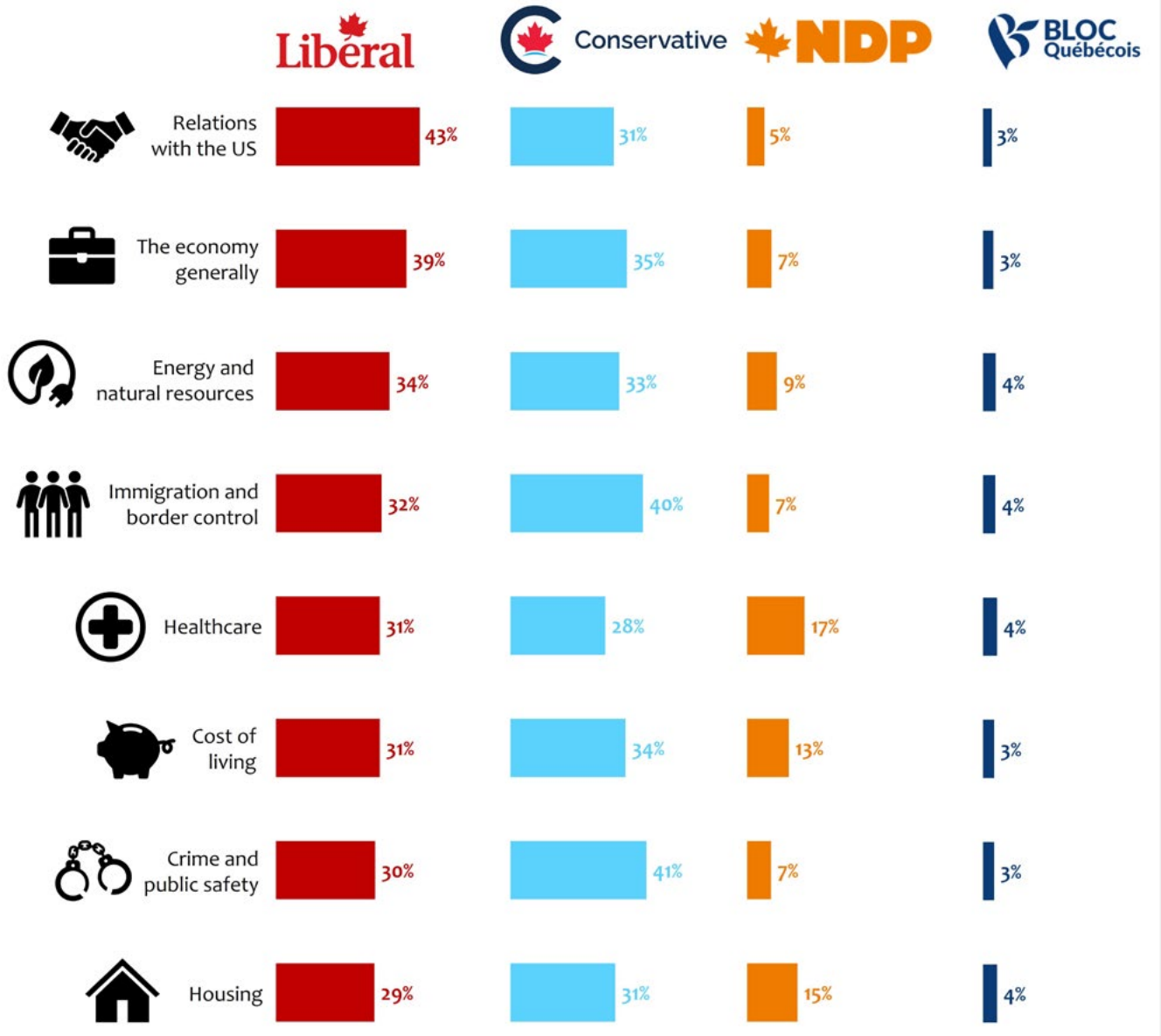
Non-white respondents were notably more likely than white respondents to choose the economy (by 35% to 26%), crime (by 17% to 12%) and housing (by 32% to 27%), and less about trade and tariffs (21% vs. 25%).



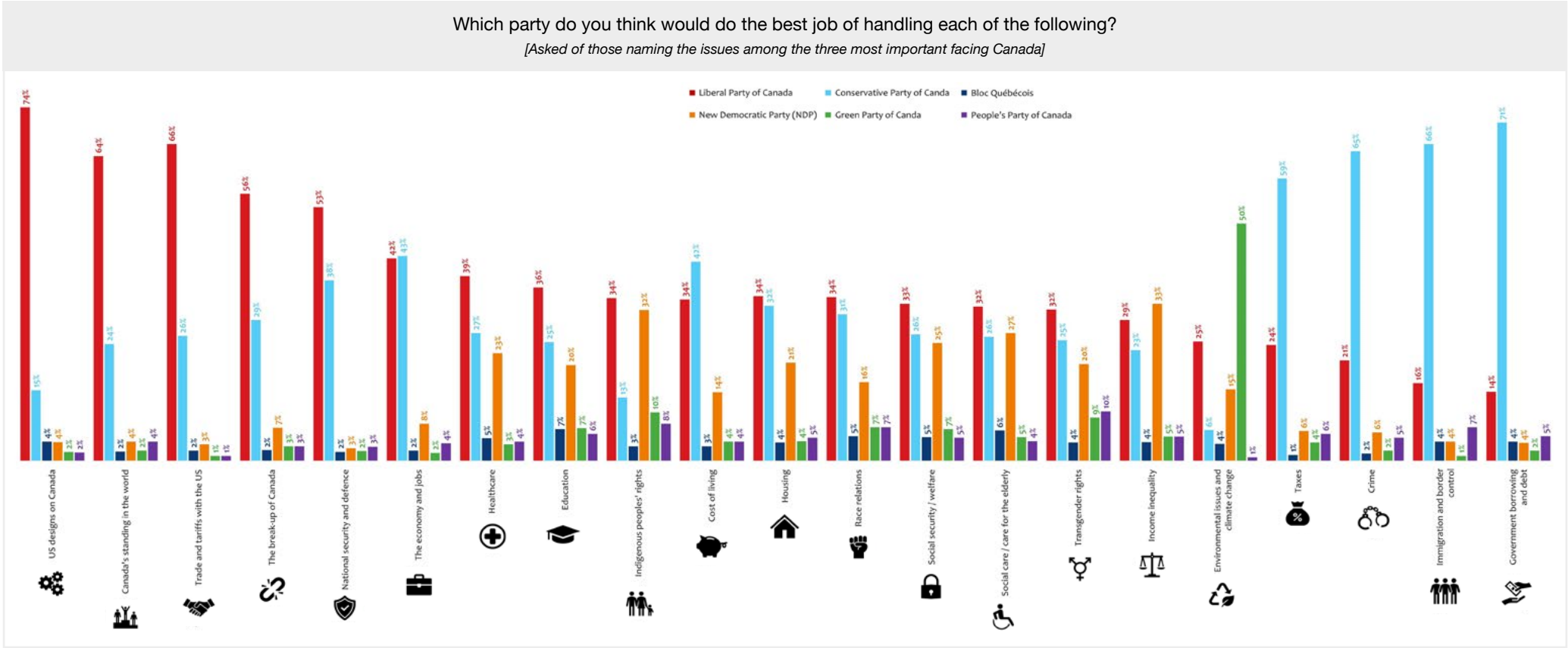
BEST PARTY ON ISSUES

Voters as a whole said the **Liberals would do the best job** on handling relations with the US (by 12 points), the economy (by 4 points), healthcare (by 3 points) and energy and natural resources (by 1 point). They put the Conservatives ahead on crime and public safety (by 11 points), immigration and border control (by 8 points), the cost of living (by 3 points) and housing (by 2 points).

Regardless of how you intend to vote, which party do you think would do the best job of handling each of the following?

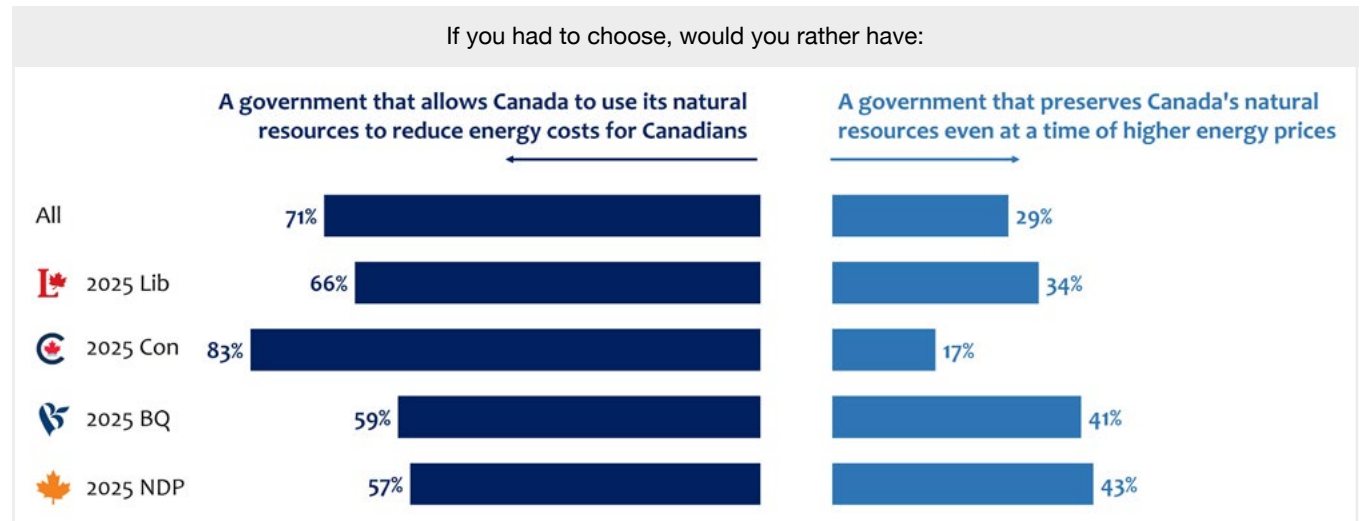


However, when we asked people which party would best handle the three issues they themselves considered the three most important, a different picture emerged. The Liberals had a substantial lead on handling US designs on Canada, Canada's standing in the world, US tariffs and trade, the potential break up of Canada, and (to a lesser extent) national security, health, education and indigenous people's rights – among voters who named those issues as priorities. The Conservatives registered similar leads – among those who considered the issue important – on taxes, crime, immigration, government borrowing and debt and, by a smaller margin, the cost of living. The economy was the most tightly contested issue among those who named it as a priority.



ENERGY AND NATURAL RESOURCES

In our poll, there was a strong preference for **allowing Canada to use its natural resources** to reduce energy costs rather than preserving them. Two thirds of 2025 Liberal voters took this view, along with more than eight in ten Conservatives. NDP voters were the most likely to favour preserving Canada's natural resources, but a majority still preferred using them to keep down energy costs.



Participants in our focus groups, including Liberal voters themselves, had **mixed views about the west coast oil pipeline**. Some saw it as a welcome and overdue investment that would promote energy independence and economic resilience, while others – particularly those who had switched from the NDP in 2025 – worried about the environmental impact and the effect on First Nations.

“I know sometimes it doesn’t seem like the woke option, but I feel like a lot of people don’t think about the alternative being to buy from countries like Saudi Arabia where they have terrible human rights issues. I also think there are ways to get oil here where indigenous people are partners and there is responsible stewardship of the land. And with gas being like \$1.80, it’s really important to have our own supply.” [Lib, BC]

“If they’d done it a hundred years ago, a pipeline from BC back to Ontario, we wouldn’t need anyone else. We would be the monopoly and everyone would have to come to us, like they do right now with Iran. No-one had the audacity to get the premiers together and say, we’re all going to work together.” [NDP-Lib switcher, ON]

“I think it can be pushed too far in the future. But at the moment it does seem like it’s needed.” [Lib, BC]

“I think there needs to be more talks among the indigenous people about the treaties in the areas where they’re putting the pipelines. I get that it’s a jobs thing, but there needs to be better relationships and agreements with that. So I don’t really like that about the Liberals, that they’re just like, ‘yeah no worries, we’re just going to do it’.” [Lib, BC]

“We’ll have to shift to renewable energy at some point because there’s finite resources. But also, the pipeline is going through land that is unceded so there’s a whole other issue about consent from the First Nations.” [NDP-Lib switcher, BC]



ECONOMIC INDEPENDENCE

More broadly, participants welcomed the **drive to make Canada more economically self-sufficient** by developing domestic energy, seeking new international trade partners and promoting interprovincial trade – though many felt this was long overdue and regretted that it had taken the Trump presidency to force action on this front. There were some concerns about having too close a relationship with China, however.

“If we refined our own oil, we’d be doing so much better. It would be a game changer for Canada. Why do we have to send it to the states and then buy it back from them?” [Lib, BC]

“In terms of how dependent we are on our neighbour, it’s an eye-opener how hard it is to this day to do interprovincial trade. My brother-in-law is a butcher and to sell meat to Quebec, there is so much red tape. We’ve been talking for 15 months about interprovincial trade and it’s still not happening.” [Lib, ON]

“It sucks that this is the impetus for it. We’re scrambling to get it rather than having it from the beginning.” [Lib, BC]

“I think Canada would just have slept through this phase like it has done in the past. It sometimes takes someone like Trump to wake people up. Sometimes pain is a good thing, to make some changes. I don’t think Canadian leadership has got the aggression to make big changes. I don’t think it would have changed within our lifetimes.” [Lib, AL]

“When Trump came in we realised we’d put all our eggs in one basket. Carney has gone outside to build relationships with countries that we wouldn’t normally be trading with. We see that in our grocery stores. Bananas from Ecuador! They usually come from the States.” [NDP-Lib switcher, BC]

“Just because we’re in this situation doesn’t mean we should be headless chickens and fish for any options that are available. We should still consider, like, who is a wise ally? Is the People’s Republic of China a good ally? I’m not so sure.” [Lib, AL]

IMMIGRATION

There was widespread agreement that the Carney government was right to take a **more restrictive approach to immigration** – though some argued that the new approach only looked restrictive in comparison to Trudeau's.

“It's one thing to be promising immigrants what the country can provide. And it's another reality what the country can actually provide. Why are we bringing more people in if people here can't even find housing?” [Lib, BC]

“It's essential to slow down immigration. We can't find housing. Hospitals are overflowing. The infrastructure is falling to pieces. We can't even help our own people and we're telling other people to come here and we'll help you.” [Lib, BQ]

“I have a 17 year-old son who's having a hard time finding jobs, even Tim Horton's, McDonald's. It's hard to get in because of these temporary workers.” [Lib, BC]

“If immigration were at 2010 levels, it would be centrist to tone it down a bit. But he went batshit crazy with the immigration and the response should be to really dial it back to minus. It went way too far under Trudeau.” [Lib, ON]



THREATS TO CANADA

For Canadians as a whole, and for 2025 Liberal, BQ and NDP voters, **the most serious threat to Canada** was currently the prospect of a trade war with the US. This was in second place for 2025 Conservatives, for whom immigration was a more serious threat. The risk of a new economic and financial crisis was second for Canadians as a whole, and was in the top three for Liberal, Conservative and NDP voters. Climate change was fourth overall, followed very closely by loss of jobs to robotics, AI and machine learning. Among those aged 18-24, AI was in third place after an economic crisis and a US trade war, ahead of immigration and climate change.

Which three of the following do you think pose the most serious threat to Canada?

All

	A trade war with the US	47%
	The risk of a new economic and financial crisis	38%
	Immigration	32%
	Climate change	25%
	Loss of jobs to robotics, AI & machine learning	24%
	US designs on Canada	21%

2025 Lib

	A trade war with the US	55%
	The risk of a new economic and financial crisis	35%
	Climate change	34%
	US designs on Canada	28%
	Loss of jobs to robotics, AI & machine learning	23%
	Division and polarisation in society	18%

2025 Con

	Immigration	49%
	A trade war with the US	44%
	The risk of a new economic and financial crisis	43%
	Loss of jobs to robotics, AI & machine learning	22%
	Foreign interference in Canadian politics	18%
	Mental health issues	17%

2025 BQ

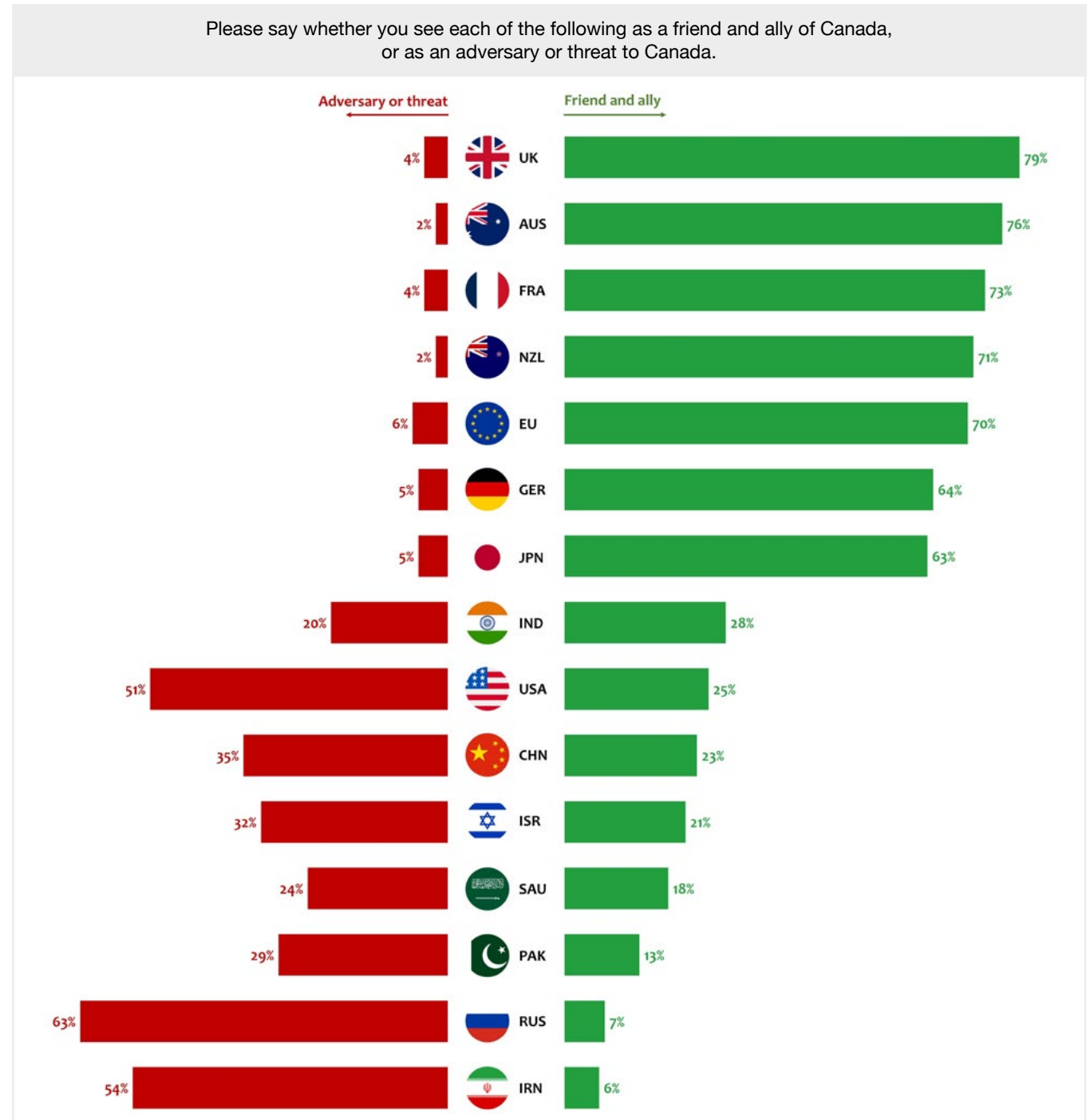
	A trade war with the US	57%
	Climate change	42%
	US designs on Canada	39%
	Immigration	35%
	The risk of a new economic and financial crisis	30%
	Inequality in society	21%

2025 NDP

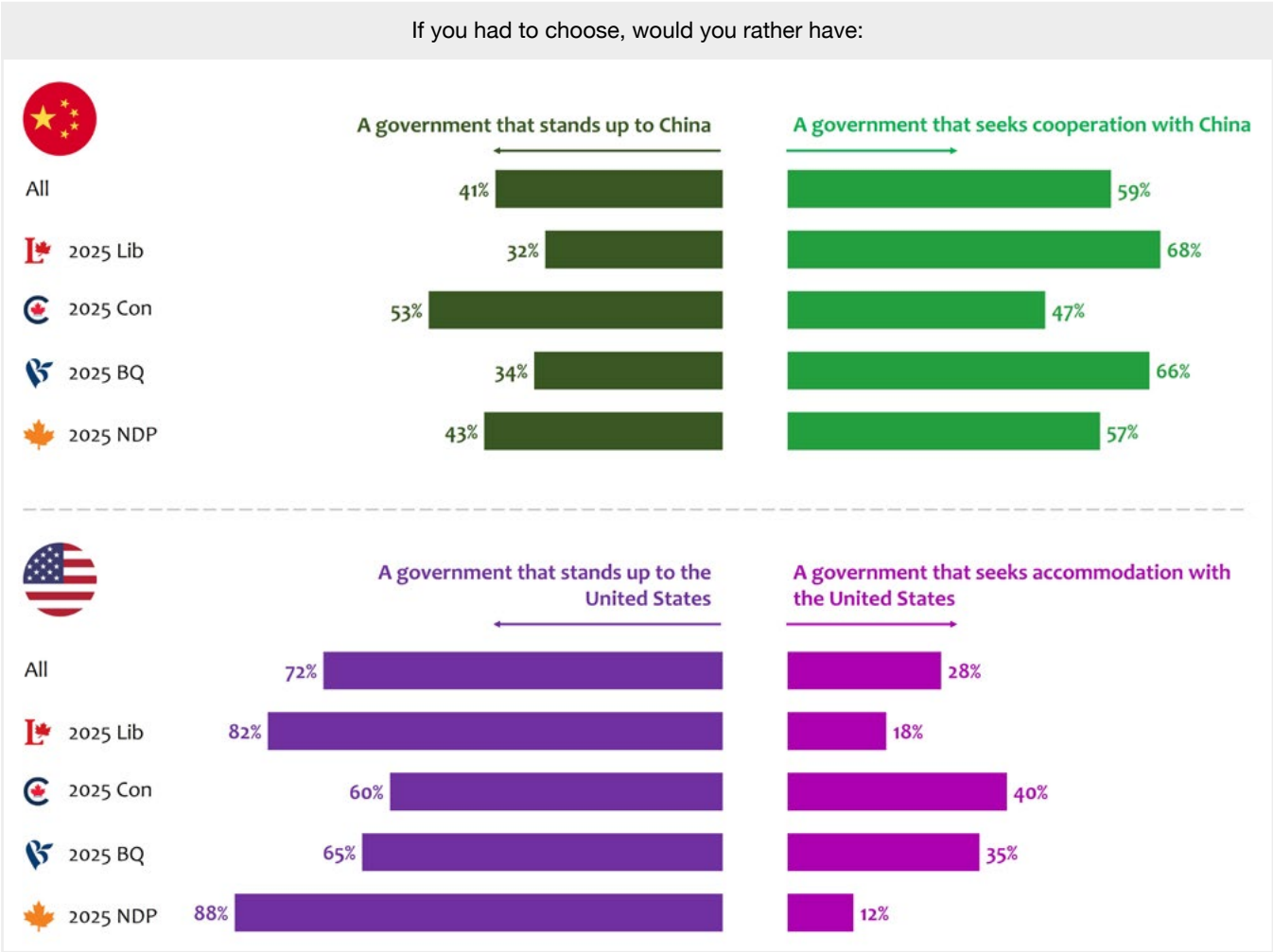
	A trade war with the US	41%
	Climate change	37%
	The risk of a new economic and financial crisis	36%
	Loss of jobs to robotics, AI & machine learning	26%
	Inequality in society	24%
	Mental health issues	24%

ALLIES AND ADVERSARIES

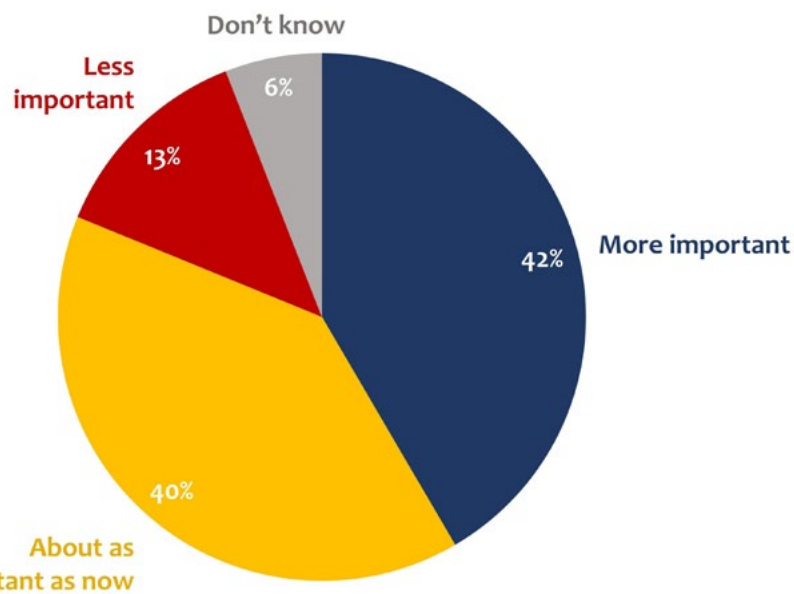
The UK, Australia and France were most likely to be seen as friends and allies of Canada, while Russia, Iran and the US were the most likely to be seen as an adversary or threat. In 2022, Canadians saw the US as an ally by 73% to 23%; four years later they are seen as an adversary by 51% to 25%. Women rated the US as a threat by a 41-point margin, compared to 11 points among men, and those aged 65+ did so by 47 points, compared to 9 points among 25-34s (the margin among 18-24s was 28 points). Those who voted Conservative in 2025 were the only group more likely to call the US an ally than an adversary (by a 4-point margin); 2025 Liberals say the US is an adversary by a 47-point margin.



Canadians were much more likely to say they wanted a government that stands up to the US as to say the same in respect of China. 2025 Conservatives were the only group in which a majority wanted to stand up to China rather than seek cooperation (and only by 53% to 47%). Conservatives were also the most likely to want to seek accommodation with the US, but still preferred to stand up to their southern neighbour by a 20-point margin.



By the time of the next federal election in 2029, Donald Trump will no longer be President of the United States. Do you think managing Canada's relationship with the United States will be more important, less important, or about as important as it is now in deciding how you vote?



Even though Donald Trump will not be president of the US in 2029, more than eight in ten thought the issues of managing relations with the US would be at least as important in deciding their vote in Canada's next federal election as it is now: 40% said the issue would be as important as it is now, with a further 42% saying it would be even more important.

This view was echoed in our focus groups. While a few were optimistic ("maybe when Trump leaves, things should quiet down a little bit"), most thought the same tensions would be present for the foreseeable future. Some added that their own view of the US had changed permanently, or noted a new spirit of patriotism or even nationalism in Canada.

"I think a lot of us have changed. If I'm looking for a bottle of wine, it's not coming from California. I'm avoiding the US section anyway. So even if things get better and they stop tariffing, I'm not going back." [Con, AL]

"Trump is a symptom. There are still thousands who have supported him. There are people in power, judicial, executive, legislative, and they're not going away any time soon. And if America can switch so quickly, I think we need to maintain our independence financially, economically, politically." [NDP-Lib switcher, BC]

"Trump winning a second time proves we can't trust them. Even if Pete Buttigieg or Kamala Harris is president in 2028, what's going to stop President JD Vance doing the exact same thing in 2032?" [NDP, ON]

"I think Carney has reawakened that nationalism in Canada that seemed to have petered out or gotten beaten down. I love it." [NDP-Lib switcher, BC]

There were mixed views about Carney's method dealing with President Trump, even within the Liberal voting coalition. Some liked his composed demeanour, but others said they would like to see a more combative approach.

“He could get more sound bites if he reacted, but I feel like he's just ignoring him like a toddler having a tantrum. We've all had to deal with that before, and I think he's handling it well.” [Lib, AL]

“He can't control Trump. I don't think anybody can. We seem to get killed with everything – the tariffs, the Georgie Howe Bridge. We built the bridge, then Trump says, 'oh, we'll take half the money', and that's how it is.” [NDP-Lib switcher, ON]

“I would like to see more proactiveness in terms of the tariffs that we're constantly being threatened with. Instead of letting Trump flap in his face, he should be like, no, that's not happening. Just be more public.” [Lib, QU]

“The economy is running on neutral now. As a citizen who voted for him, I expected him to be better and go head-to-head with Mr Trump. We're Canada, we're strong, we have a lot of stuff that they don't have.” [Lib, QU]



PARTIES AND LEADERS

MARK CARNEY AND THE LIBERAL GOVERNMENT

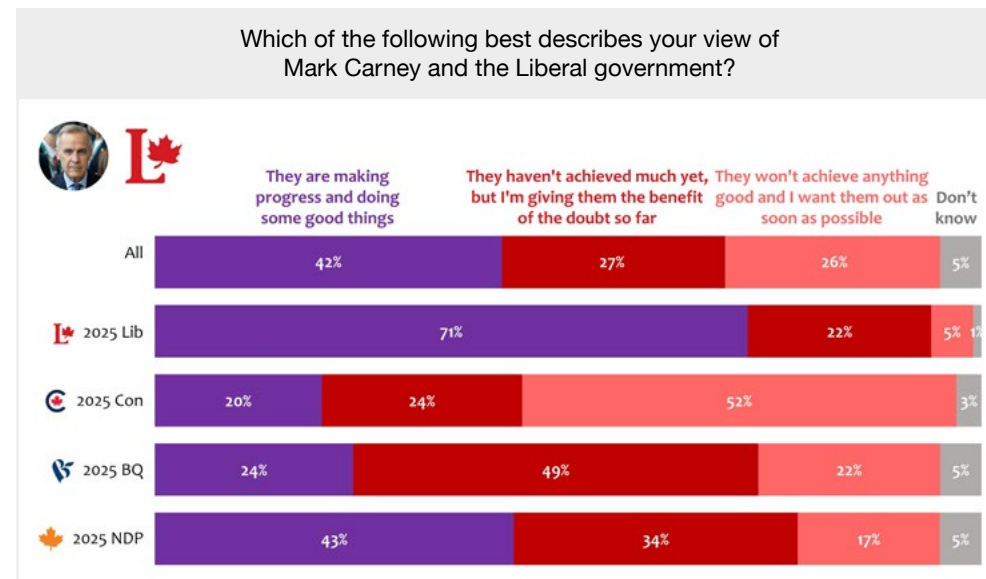
Canadians had a **generally positive view of Mark Carney and the Liberal government**. Overall, 42% – including one in five 2025 Conservative voters, nearly a quarter of BQ voters and more than four in ten NDP voters, as well as more than seven in ten of those who voted Liberal – said they were making progress and doing some good things. A further 27% said they hadn't achieved much yet but they were still giving them the benefit of the doubt. Only just over a quarter – including only just over half of Conservatives – said the government would achieve nothing good and they wanted them out as soon as possible.

Asked what the Carney government had done since taking office, our focus groups talked about negotiating with the US over tariffs and other demands, international trade deals, domestic energy infrastructure, encouraging economic self-sufficiency, restricting immigration, promoting co-operation between provinces and fostering Canadian nationalism or patriotism. Many spoke of Carney's calm, measured approach and said he was the right leader at the right time.

“He's about being independent, trying to build up systems that make our country more prosperous from the inside.” [Lib, BC]

“The deck of cards he was handed was bad. He's trying to make the best of it. He's trying to clean house a little bit.” [Lib, QU]

“He seems very reliable. His communication skills are nice. It seems like he can have good, productive discussions with other world leaders. It seems like he's got some stability.” [Lib, AL]



However, some said they had been disappointed with the pace of progress, especially on the domestic economy, the cost of living, housing, crime, or decisions on specific issues such as the condo developer bailout and the Georgie Howe Bridge.

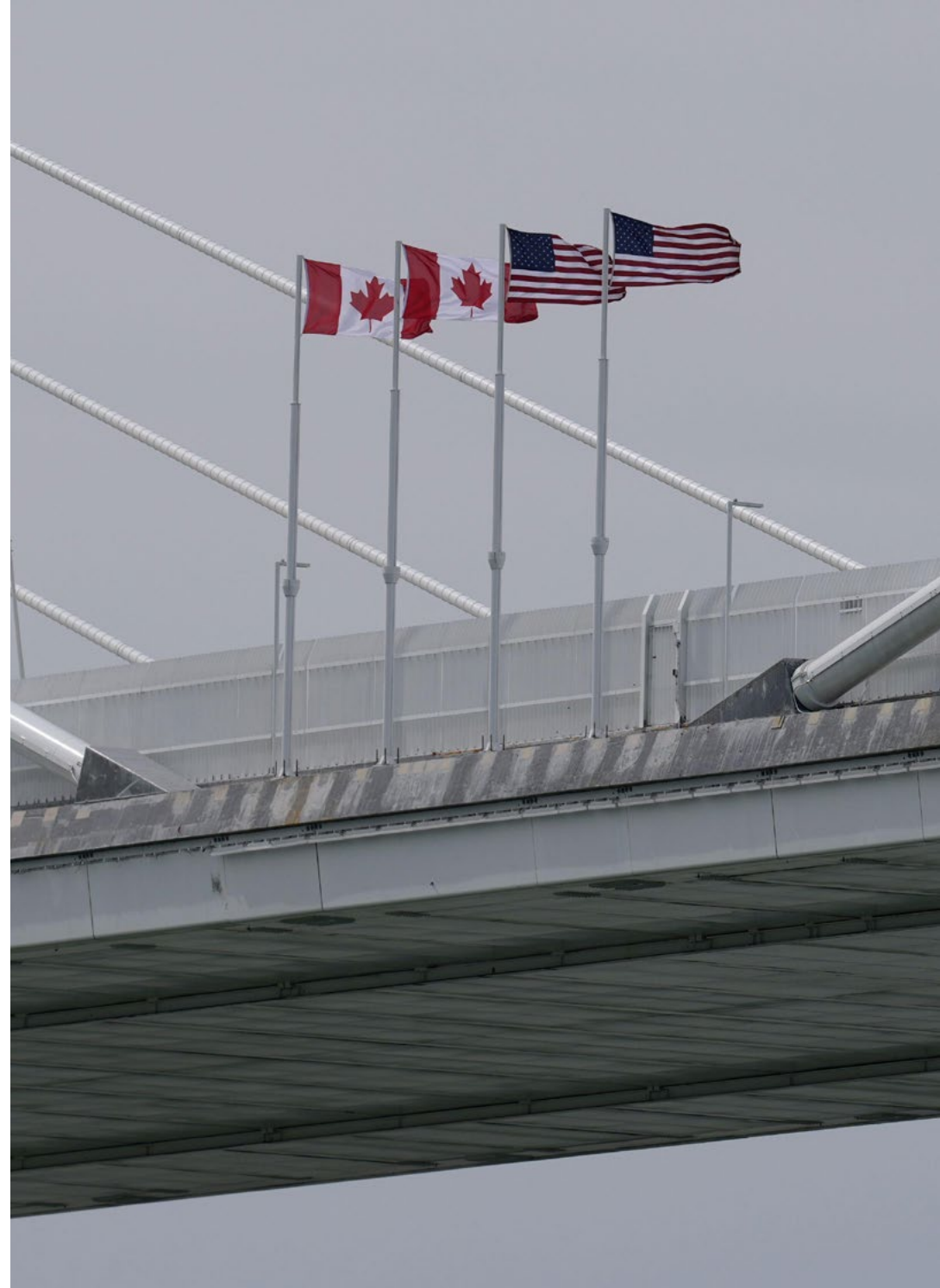
“I would say I’m pretty lenient with him because of all that’s going on with the US. I’m pretty confident with what he’s doing so far.” [Lib, ON]

“I want to be reasonable because these things take so long. At the same time, am I ever going to be able to afford a house and live the life I want to live?” [Lib, ON]

“I think he should deliver that stuff now. Forget the US, deliver something how domestically that doesn’t depend on everyone else. He had a great idea to eliminate barriers to trade between provinces. It’s harder to trade between provinces than it is with other countries. So his idea around that was awesome, but just deliver something so we can see something tangible.” [Lib, ON]

“I want to see more improvements. It’s slower than I was thinking. They talked about it pretty strong during the election. Things like affordability, housing. The cost of living is just too much.” [NDP-Lib switcher, BC]

“It’s disappointing to me because it’s been a year or more since the election and there haven’t been any important results. If there were elections tomorrow I don’t know what I would do.” [BQ-Lib switcher, QU]



Participants from all political backgrounds observed that Carney was adopting **more centrist policies than Trudeau**, whether on energy, tax, the environment, immigration, or his approach to social and cultural issues. Some Liberal voters were comfortable with this, trusted Carney not to go too far or regarded it as a price worth paying for keeping the Conservatives out of office. However, several longstanding Liberals and switchers from the NDP were concerned about the direction of travel.

“It’s a balance, which I feel the country requires.” [Lib, BC]

“Some of my parents’ generation are leaning Liberal, but hearing it from Carney they’re like ‘OK, maybe we do need that to happen.’” [Lib, BC]

“I knew he was going to be that way and that’s OK with me. As long as the other stuff stays in play, we’re not losing human rights, right to choose and all that stuff still stays, and he’s given me no indication that that stuff is going anywhere.”
[NDP-Lib switcher, BC]

“He’s been pretty moderate in terms of just doing what needs to be done so far but some of it has maybe been an overcorrection. I feel like the environmental stuff has completely gone by the wayside and he’s just focused on the economy. Which I’m not completely upset about, but it feels like we’re undoing a lot of progress.” [Lib, ON]

“I think towards the end of Trudeau and Jagmeet Singh’s tenure, the pendulum had swung way too far for most people’s comfort. I think this brings us back to a little bit more normalcy and everyday people, where most people can say ‘I’m pretty comfortable with where we’re at’.” [NDP-Lib switcher, BC]

“I’d very much like him not to be doing most of that. But if my alternative is Pierre Poilievre as prime minister, that’s not a choice.” [NDP-Lib switcher, ON]



In our focus groups, participants who had **switched from the NDP to the Liberals** in 2025 usually gave two main reasons. One was that the NDP was not offering what Canada needed at the time, especially on the economy and the perceived US threat. The other was the threat of a Conservative victory, prompting a tactical vote for the Liberals.

“It wasn’t what we needed right now. We needed jobs, we needed better financial backing. They were regurgitating a lot of super-liberal things, but we didn’t need that right now. We needed to make money and spend money.”

[NDP-Lib switcher, ON]

“I saw what was happening in the US and the rise of the right wing, and I was scared of Pierre Poilievre and his radicalness. Voting Liberal was completely strategic for me. I didn’t entirely believe in their platform, I was more aligned with the NDP, but I sided with that in order not to split the vote between the NDP and the Liberals.” [NDP-Lib switcher, BC]

“I felt like we were very weak and when Trump said we were going to be one state, I thought, oh no. In 2021 I wasn’t really concerned about security.” [NDP-Lib switcher, BC]

A few said they could see themselves going **back to the NDP in future elections** if political circumstances were different. However, a number of other left-leaning voters said they would need a lot of convincing that the party had strong enough leadership and credible policies.

“If there’s not the threat of a Conservative win, I would probably vote differently. I would want a lot more from any party I would vote for when there’s no threat of a Conservative win.”

[NDP-Lib switcher, BC]

“If Avi Lewis does become a strong voice and make a name for himself, then I can see myself voting NDP again. But I don’t know what he’s up to, really.” [NDP-Lib switcher, BC]

“I don’t see the NDP as a federal power for the longest time. Provincially, yes. But they have a lot to learn internationally and with business, industrial stuff, the finances.”

[NDP-Lib switcher, QU]

PARTY AND LEADER RATINGS

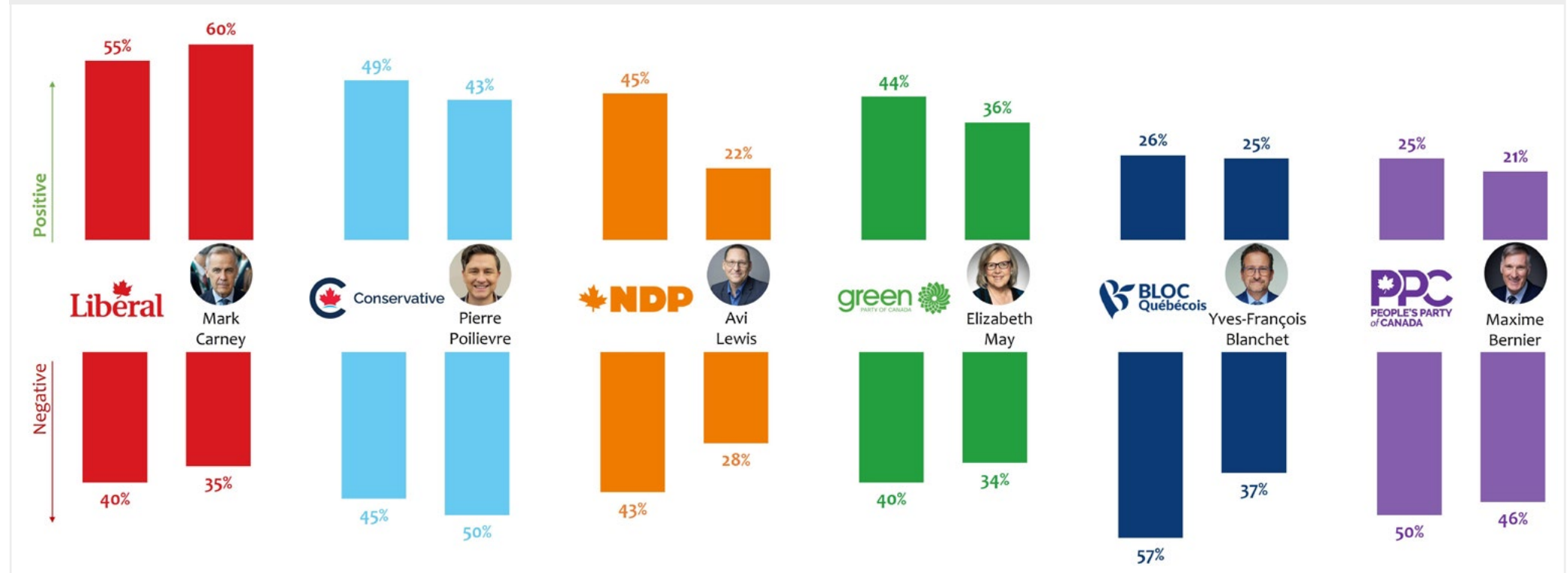
Canadians were more likely to have a net positive view of Mark Carney (+25%) than of the Liberal party (+15%). The reverse was true for Pierre Poilievre (−7%) and the Conservatives (+4%). Some 8.5% of the electorate rate the Conservative party positively but its leader negatively, and more than three quarters of this group prefer Carney as prime minister when forced to choose.

Poilievre's net favourability was close to neutral or positive among voters up to the age of 44, but declined steeply to a net -29% among those aged 65+. Support for Carney ran the other way, from around +20% among under-35s to +40 among the oldest group. While Poilievre scored a marginal net positive rating among men (+1%), his rating among women was −14%. By contrast, Carney enjoys a small advantage among women.

Poilievre achieved more positive scores among non-white Canadians overall (+2%) than among white Canadians (−10%) and was clearly positive among South Asian (+12%) and black respondents (+10%), though negative among Chinese Canadians (−8%). However, this does not translate into party preference: the same groups record far higher numbers for both Carney and the Liberals.

The PM was also a less polarising figure than his opponent. While Poilievre is rated −64% by Liberal voters, Carney is only rated −33% among Conservatives.

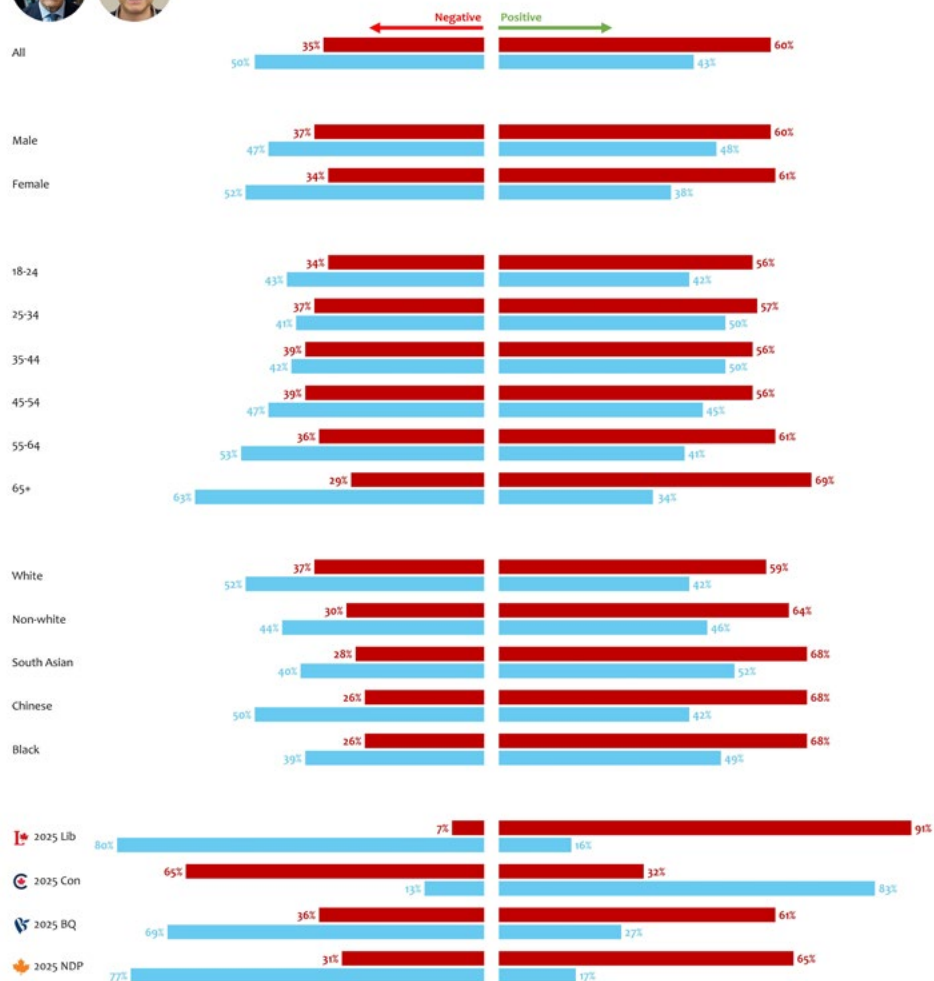
How positive or negative do you feel about each of the following?



How positive or negative do you feel about each of the following?



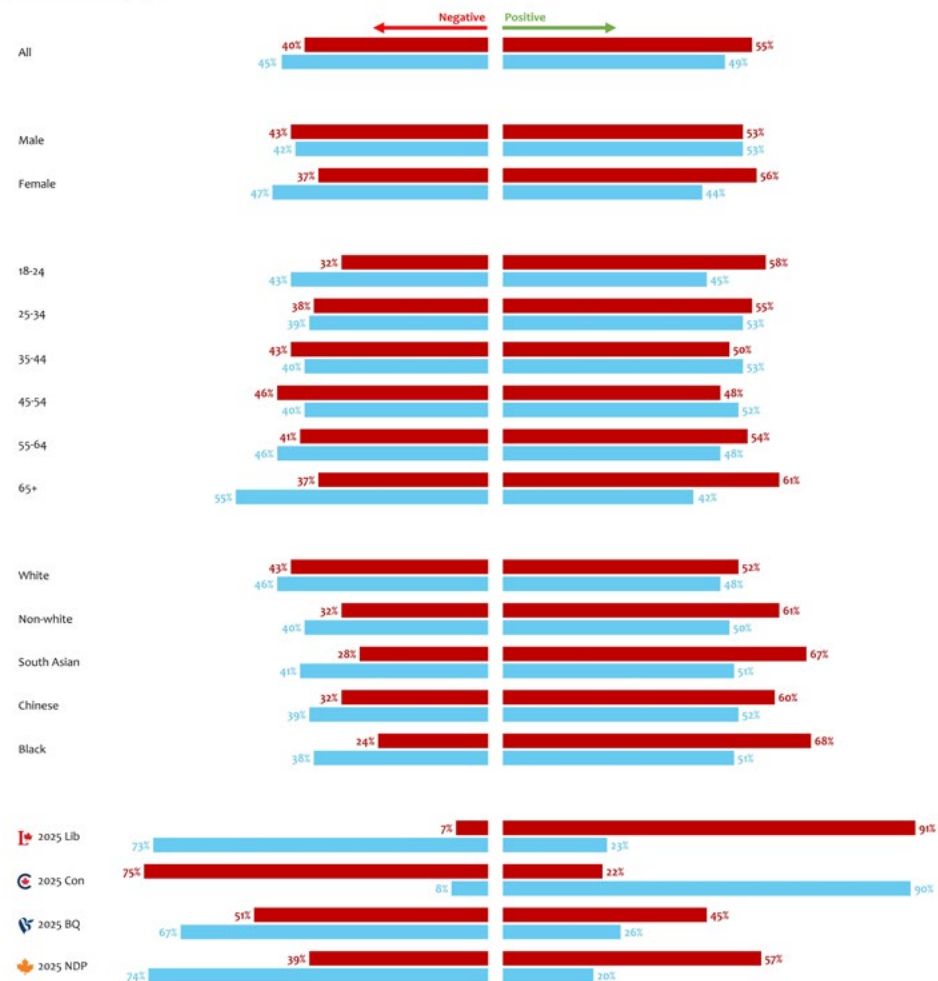
Mark Carney Pierre Poilievre



How positive or negative do you feel about each of the following?

Liberal Conservative

Liberal Party of Canada Conservative Party of Canada



In our focus groups, **wavering voters who decided on the Liberals usually mentioned Mark Carney** as a decisive factor. They liked his financial and international experience and the fact that he was not a career politician, and tended to see him as a better match for President Trump. Some also noted that they would have found it hard to vote for Justin Trudeau again, but saw Carney as a more moderate, centrist and competent figure.

“Considering the status of our country economically last year, inflation, the job market, I think we needed someone that was economically focused and that was Carney.” [Lib, BC]

“I was looking at my options, and I found the best one would be this guy that would be able to stand up against the US that has more pedigree in terms of who he is.” [Lib, BC]

“It was getting harder and harder to vote Liberal, but it was easier to vote for Carney than Trudeau because he’s like a businessman.” [Lib, ON]

“Carney is almost like a Conservative. He’s as close to a Conservative as you can get. So it was easier for me because he straddled the line.” [Lib, ON]

“There was the financial background, and there was just something very trustworthy about the gentleman.” [Lib, ON]

“I felt like with Carney it was a fresh start. He was the right person at the right time.” [Lib QU]

“They were in the middle of a trade war, tariffs, and I’m obviously going to pick the counterweight to Trump. I felt like the Conservatives with Pierre were too aligned with the American side. You wanted to protect Canadian sovereignty so you’re going to go with Mark Carney, who was an economist. The background sort of made sense.” [Lib, QU]

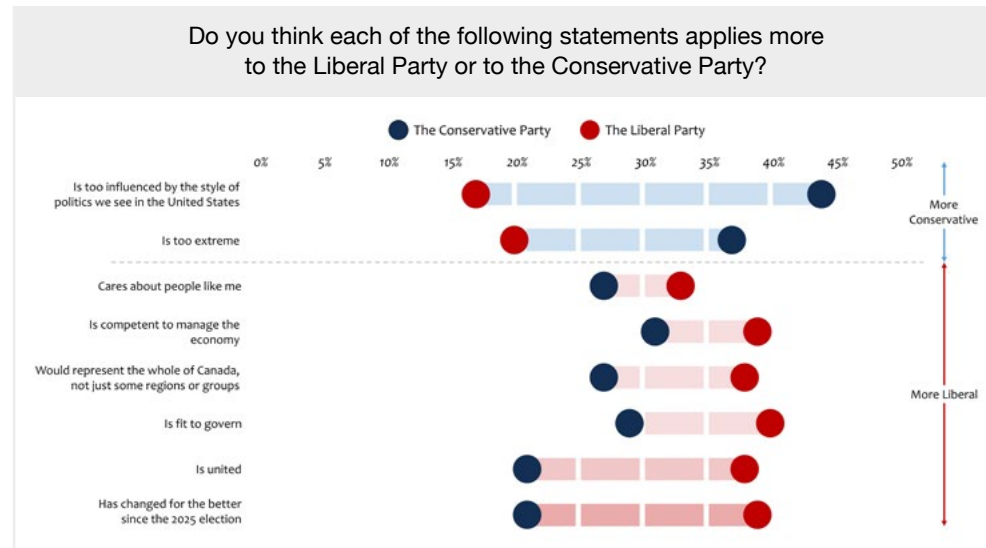
“He wasn’t a career politician. He was involved in politics, but on the fringe. And he had a particularly strong hand in guiding the economy at the Bank of Canada and in the UK.”
[NDP-Lib switcher, BC]

“The country needed some fiscal savvy, or we were going to hit a wall. And he didn’t look much like a politician.”
[BQ-Lib switcher, QU]

“Trudeau was looking for publicity and was trying to keep certain groups happy in terms of demography, religion – doing things which are to their benefit but don’t necessarily benefit everyone else. Carney is probably trying to please at least 70% of the population, as opposed to, I don’t know, 25%.”
[NDP-Lib switcher, ON]

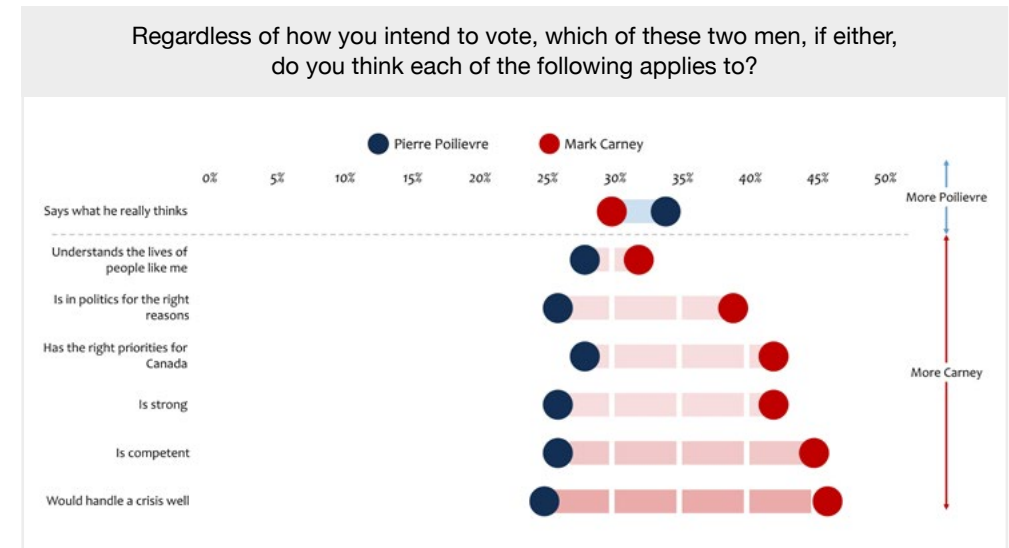
PARTY ATTRIBUTES

On **specific attributes**, the Liberals were more likely than the Conservatives to be seen as competent to manage the economy, to be fit to govern, to represent the whole of Canada and – especially – to be united and to have changed for the better since the last election. The Liberals also led on “cares about people like me”, though only 33% thought this was true of the party. The Conservatives were more likely to be seen as too extreme (though only 37% said this description applied) and – especially – too influenced by US-style politics. Just under half (43%) of Canadians thought this latter description was true of the Conservatives, including nearly one in five (19%) of the party’s 2025 voters.



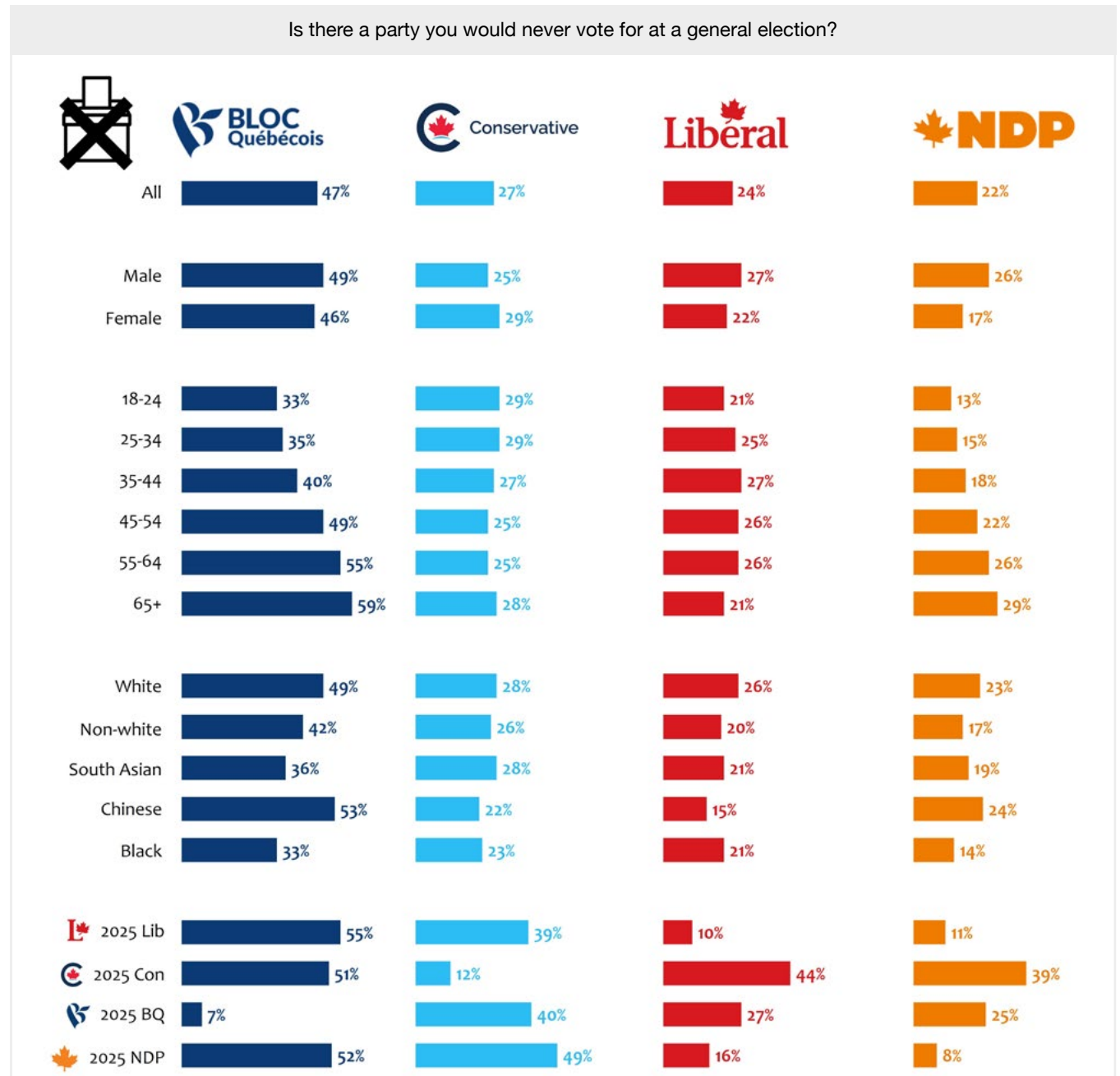
LEADER ATTRIBUTES

When we asked about the **personal attributes of the Conservative and Liberal leaders**, we found Pierre Poilievre was considered slightly more likely to say what he really thinks, while Mark Carney had a small lead when it came to understanding “the lives of people like me” (though only 32% thought this was true of him). Carney was substantially ahead when it came to being in politics for the right reasons, having the right priorities for Canada, being strong, and – especially – being competent and good in a crisis.



WHO WOULD YOU NEVER VOTE FOR?

A slightly higher proportion of voters said they would **never vote for** the Conservatives (27%) than said the same of the Liberals (24%) or the NDP (22%). Fewer than half (44%) of 2025 Conservative voters said they would never vote Liberal, and only 39% of 2025 Liberals said they would never vote Conservative. Only just over one in ten Liberals ruled out voting for the NDP, and only 16% of NDP voters ruled out the Liberals.



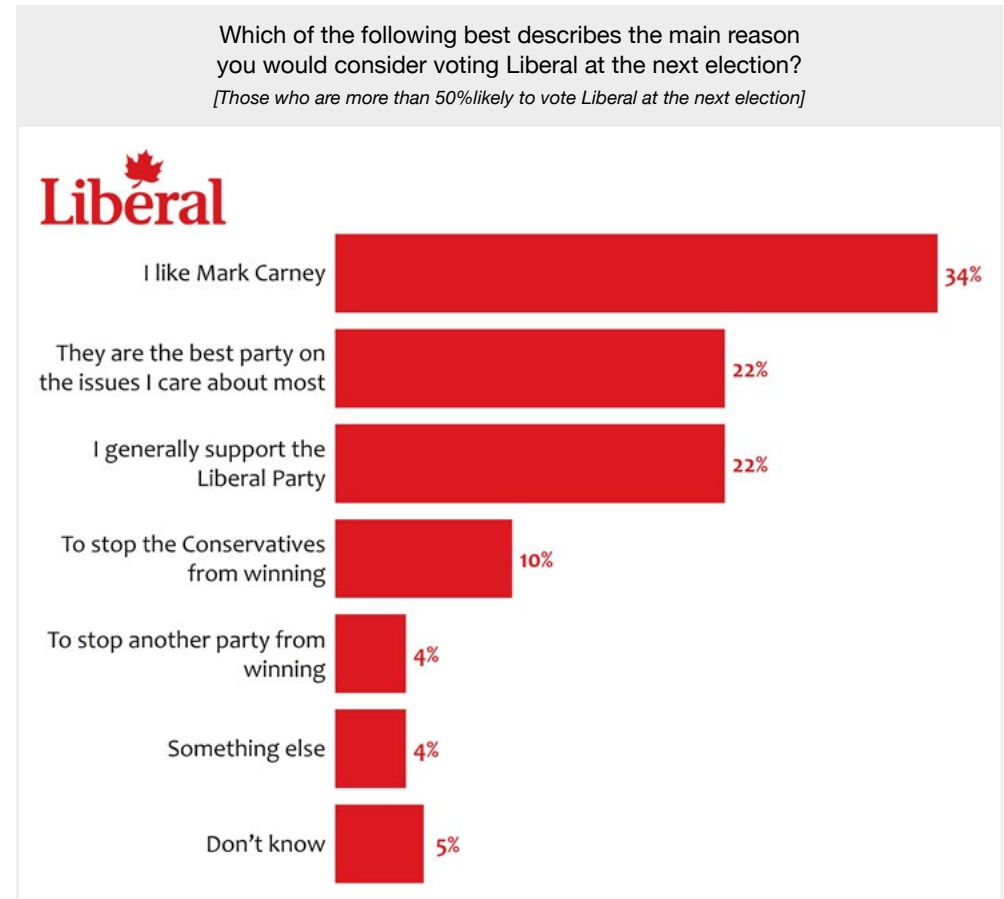
REASONS TO VOTE LIBERAL

Mark Carney himself was chosen as the biggest **reason for voting Liberal** at the next election by those putting their likelihood of doing so at 50+ out of 100. More than one in three gave this as their main reason, including four in ten of those who voted Conservative in 2025 but were now leaning towards the Liberals. Next were support for the party generally and the perception that they had the best approach to issues these voters cared about. One in ten likely Liberal voters said their main motivation was to stop the Conservatives from winning – a reason more likely to be chosen by younger Liberal-leaning voters than older ones. While younger likely Liberals voters were more likely than most to say they supported the party generally or wanted to stop the Conservatives from winning, seniors were much more likely to say they liked Mark Carney or that the Liberals were best on the issues they cared about most.

In our focus groups, **some 2025 Conservative voters said they would now consider voting Liberal**. This was usually because they were impressed with Carney, saw him as a considerable improvement on Trudeau and supported his approach to the economy.

“It’s a different landscape now. I would have to see what has changed and what more is being brought to the table that we don’t already have now that we have Carney and he’s more in the centre.” [Con, AL]

“As it is right now, I’m not saying 100%, but I’m liking what Carney is doing more than Poilievre at the moment. My biggest thing is fiscal responsibility, getting back to where we’re supposed to be at.” [Con, AL]

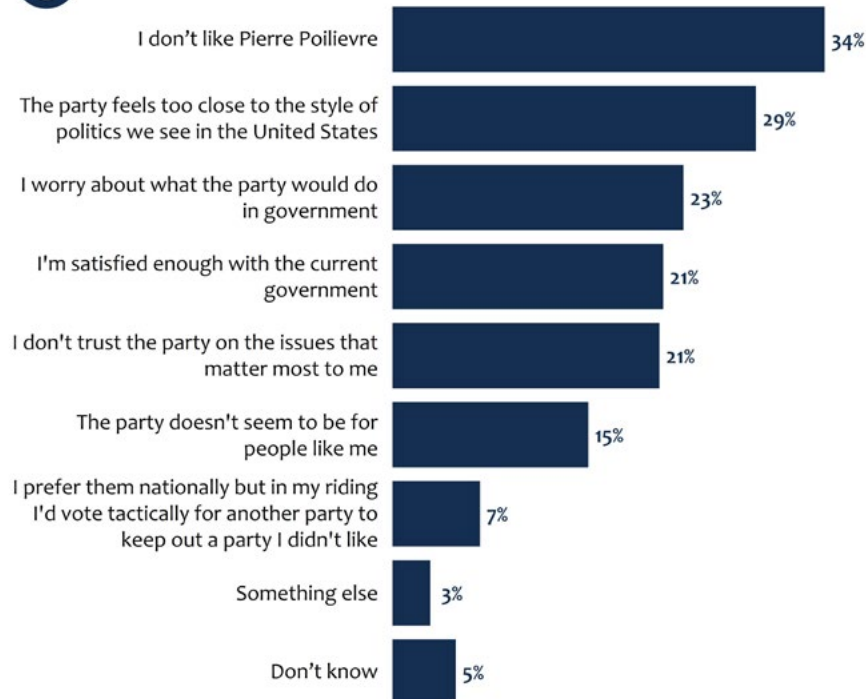


REASONS NOT TO VOTE CONSERVATIVE

We asked **potential but currently unlikely Conservative voters** – those who put their chances of voting for the party next time at 25-49 out of 100 – what put them off. Pierre Poilievre was the biggest reason, followed by a feeling that the party was too close to US-style politics. Concerns about what the party would do in government, not trusting it on the issues that matter, and satisfaction with the current Liberal government were cited by similar numbers. Fifteen per cent said the Conservatives don't seem to be for people like them, while 7 per cent said they supported the party nationally but voted tactically to stop another party in their own constituency.

You said there is some chance you would vote Conservative at the next election, but that you probably won't. Which of the following, if any, best explains why?

[Those who are 25-49% likely to vote Conservative at the next election. People could select up to two reasons]



Once again there were notable variations by age. Only around a quarter of those aged up to 34 cited Poilievre as one of their reasons not to vote Conservative, compared to nearly half (48%) of those aged 65 or over. Older voters were also more likely to say the Conservatives seemed too close to US-style politics and that they were satisfied enough with the current government. Those aged 18-34 were around three times as likely as those aged 65+ to say the Conservative party “doesn't seem to be for people like me”.

Asked what they liked about **the Conservatives at their best**, our focus group participants often talked about the party's approach to business, the economy, the public finances, and law and order.

“I don't agree with the Conservatives on everything, but they manage the wallet well. If Pierre came to power, he would reduce the debt. With the Liberals, the debt keeps going up.” [BQ, QU]

“I hated them when I was young but now I understand we have to have order, otherwise we just accept everything. We have to have some rules imposed. What I like less about the Conservatives is the religious side.” [BQ, QU]

“When my parents came here, my dad built a business out of almost nothing. So from my point of view, the Conservatives stand for the smaller guy and for the folks that are working really hard to build something in Canada and ensuring that Canadian business is successfully moving forward” [Con, AL]

As in our poll, focus group participants who had **considered but rejected the Conservatives** at the last election often said the party seemed too American – sometimes in terms of policy, but usually in terms of what they saw as a negative and aggressive campaigning style. There was also a widespread view that the party was too socially conservative and put too much emphasis on social and cultural issues rather than the economy and public services. Similar points were made about Pierre Poilievre himself.

“If he maybe just appealed to trying to get people to switch sides more in the middle, he might have done a bit better, but I felt he was doing stuff to appeal to the people who already would have voted for him. ‘This is for my Trumpers in Canada’ type of thing.” [Lib, BC]

“He was doing exactly what Trump was doing on Twitter, bashing people left, right and centre.” [Lib, QU]

“I think he was trying to give the same MAGA image as Trump. But he doesn’t really look like a MAGA guy. He looks like a soft type guy who is supposed to be on Cosmo magazine.” [Lib, ON]

“I think I’m fiscally conservative and socially liberal. If they would stop talking about same-sex marriage and all that stuff, that was decades ago, that’s already been dealt with, that would really help their case. There’s a lot of people who would probably be Conservative if they would focus on more centre issues and stop leaning into some of the hardcore right-wing people.” [Lib, AL]

“The Conservative party still goes on about all that stuff. We’re way past that. It’s been normalised, in America, in Canada. I’m more concerned with taking care of problems, tax, infrastructure, health care, all that. Forget about all that other crap.” [Lib, AL]

“I can’t remember specifics, but there were things where I was like, that sounds very American. And with the repealing of Roe versus Wade, I felt like the Conservatives might consider that as well.” [Lib, AL]

“He comes across as aggressive, someone who’s constantly trying to downplay the opposition instead of talking about actual work that should be done.” [Lib, AL]

“I don’t think he’s terrible, I just think if you could get a politician out of central casting, it would be that guy. He’s just very generic politics guy. So when Carney came in and he was not a politician, people thought ‘this guy has more substance’.” [Lib, QU]

“I found him a little argumentative. It was more an attack on their campaign versus what are you going to do? It wasn’t how they were going to change things, it was what they were doing wrong.” [Lib, ON]

“For me, he would have to do something extraordinary because he lost his seat. And to come back in a by-election, but he had to ask somebody who also worked there, who wanted to develop a career in politics, and they have just won and they have to step down to let you take their place. I find that problematic.” [Lib, QU]

Several also observed that Carney's economic credentials, combined with a more centrist policy agenda, had left **little room for the Conservatives at the last election** – but that their verdict on the government's performance would depend on delivery.

“One thing I really liked about the Conservatives is that they wanted to cut tax by 1% and give more to Canadians. But at the end of the day we have to look at the team, the policies and the expected timeline. So right now we're giving the Liberals a chance and Carney's team, and they'll be judged on grocery bills, heating costs, gas...” [Lib, QU]

“They should be conservative, as in moderate, restrained, especially economically. I don't think socially they should be conservative. I don't think that's very popular. Everyday affordability issues, they should tackle that. That is their bread and butter. They need to get back to having a vision and not being so negative all the time.” [Lib, ON]

“Carney is more like a traditional Conservative in that he's socially liberal but fiscally conservative, which used to be the recipe for the Conservatives to win. The social side of governing has always been their Achilles heel, trying to court a base that either doesn't vote or isn't big enough. But now there's a clogged lane in the fiscally conservative, socially liberal spectrum with Carney. He's definitely more right leaning than Trudeau ever was.” [Lib, ON]



Canadians as a whole said they would be **more likely rather than less likely to vote Conservative at the next election** if the party were led by someone other than Poilievre (by 34% to 14%), though with nearly half (44%) saying it would make no difference.

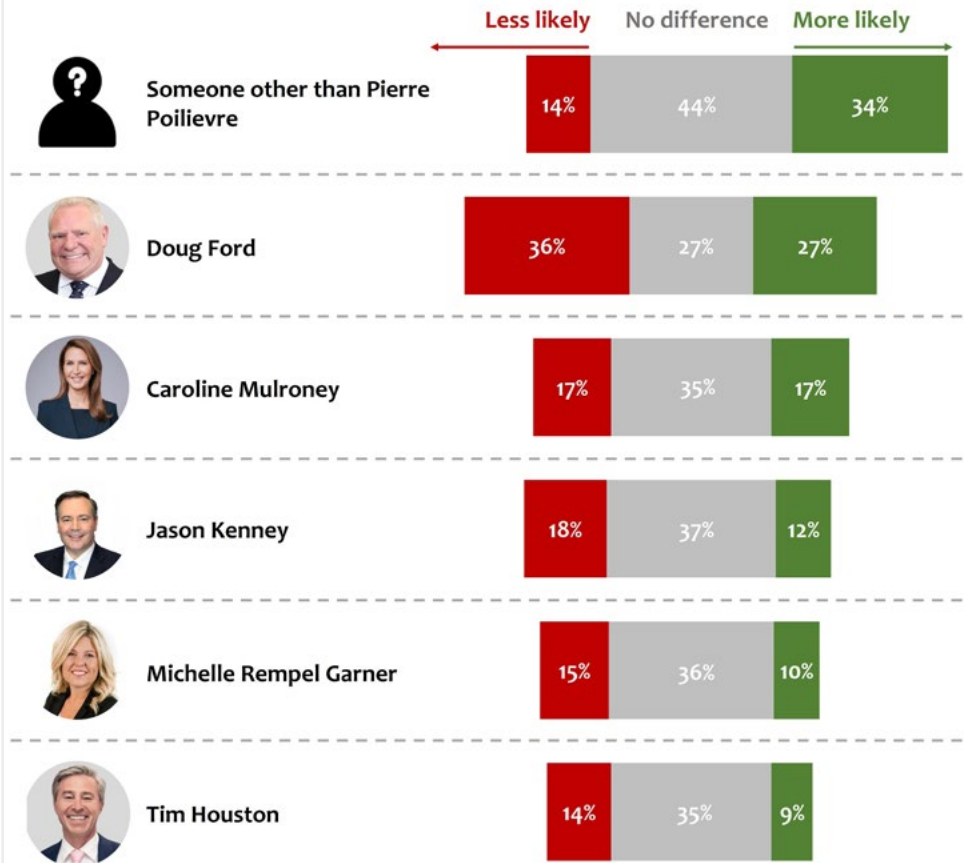
However, when we asked about specific individuals who have been suggested as potential leaders, voters as a whole said that each one would make them slightly less likely to support the party rather than more (though they were evenly divided in the case of Caroline Mulroney).

Our focus groups could think of no obvious contender for the Conservative leadership in the event that Poilievre stepped down.

“I think the big problem is that there isn’t a shining star in the Conservatives, at least no-one we’ve seen so far. And that’s why Poilievre is in the position he’s in. He would have been out as party leader after that collapse if there was anyone else.” [Con, AL]

“The list of people who could take Pierre’s place is not very long. It’s a very short list and it’s not very impressive.” [Lib, ON]

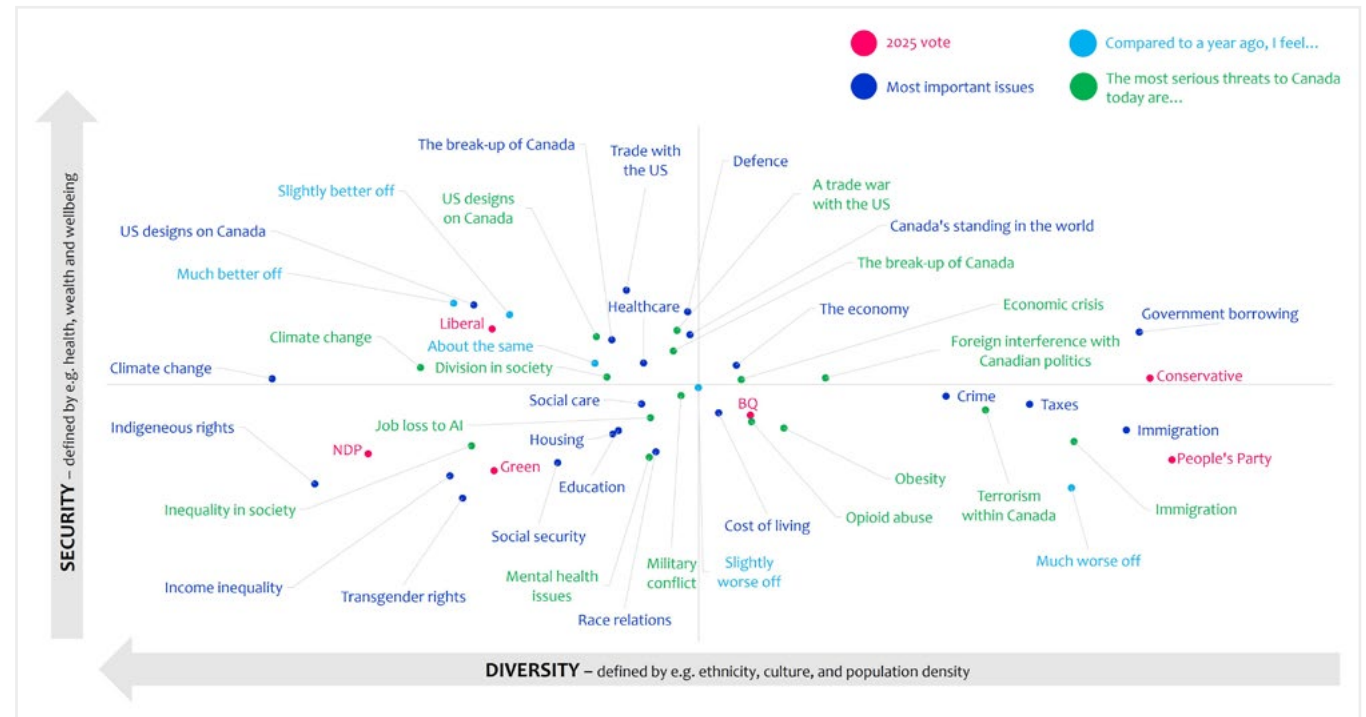
Regardless of your overall view, would you be more likely or less likely to consider voting Conservative at the next election if the party were led by any of the following, or would it make no difference?



What is the first word or phrase that comes to mind when you think of...



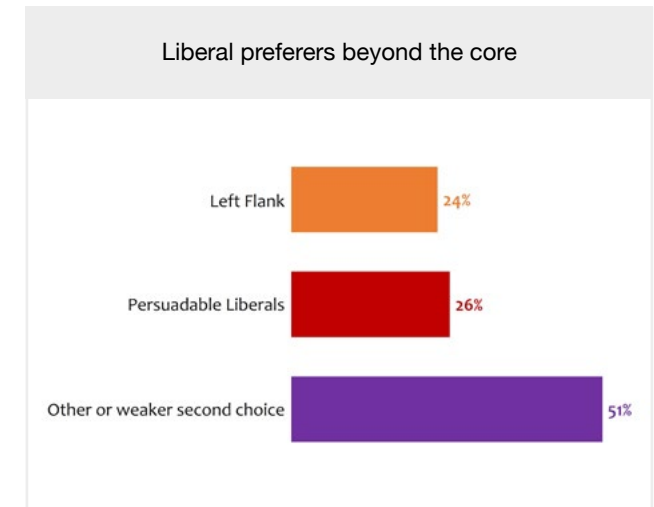
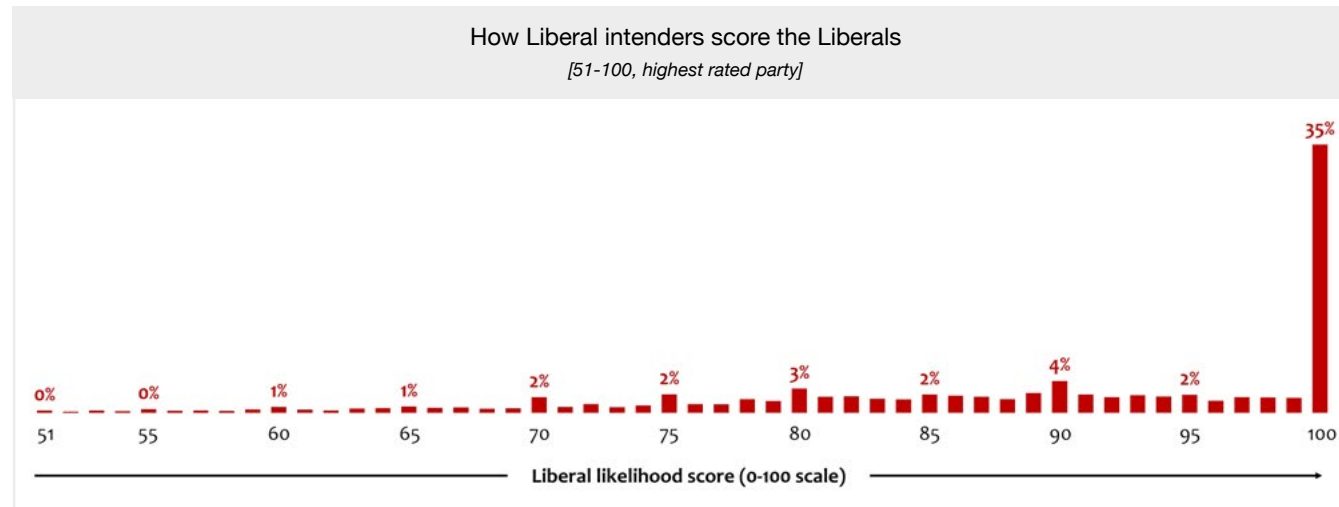
Our political map shows how different issues, attributes, personalities and opinions interact with one another. Each point shows where we are most likely to find people with that characteristic or opinion; the closer the plot points are to each other the more closely related they are. Here we see where we are most likely to find each party's 2025 voters, people who rate particular issues as important, different perceptions of the biggest threats to Canada, and which kinds of voters are most likely to say they feel better or worse off than they did a year ago.



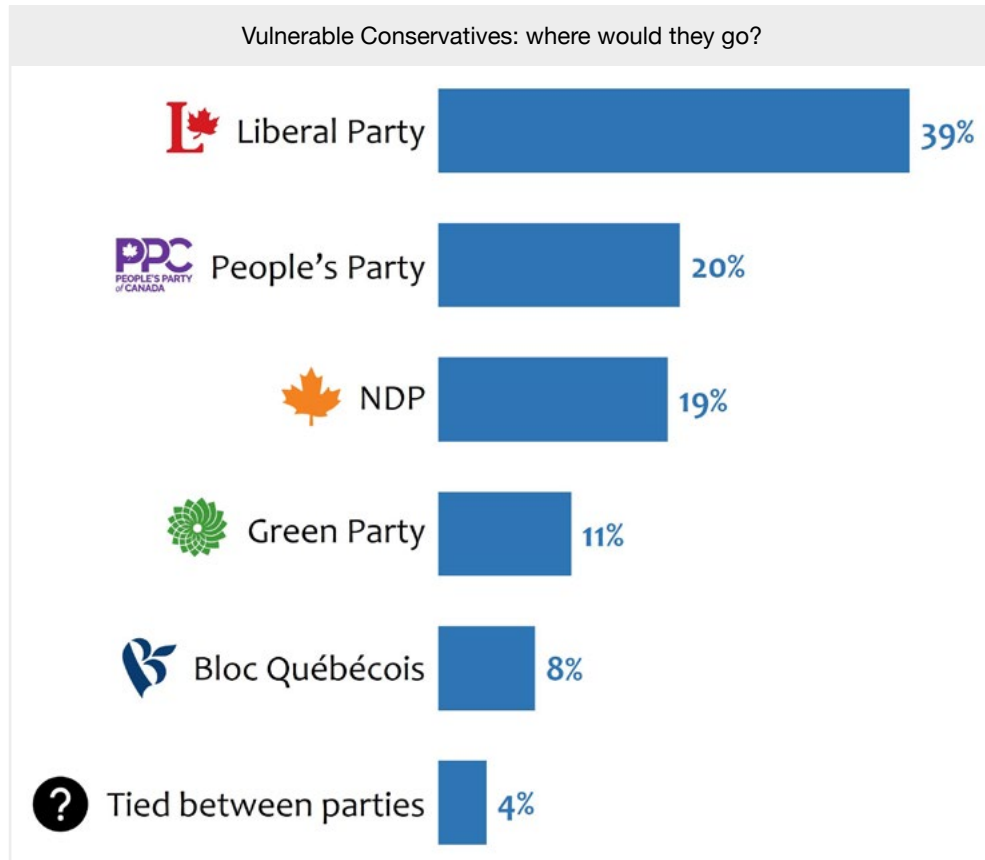
THE KEY GROUPS

At the 2025 election, left-leaning voters consolidated behind the Liberals. This meant the Conservatives lost despite polling more than 40% of the vote. If the Liberal coalition unravels, the Conservatives could win next time with a lower vote share; if it holds together and the two-party era endures, we could see a similar result to last time. Rather than predicting which of these scenarios is more likely, we can look at the types of voters who will decide.

Just over one third (35%) of current Liberal supporters say they are certain (100/100) to vote for the party at the next election. Among the rest, the threat to the Liberal party comes from two sources: those who voted Liberal in 2025 primarily to stop the Conservatives (tactical voters), and those who would consider voting Conservative but preferred Carney and his party last time (swing voters). Together, these two categories make up half the non-core Liberal vote.



The Conservatives, meanwhile, appear to be able to count on just over half of their current voters: 54% of them put their likelihood of voting for the party next time at 100/100. For the rest, the Conservatives' biggest concern is also with defections to left and right. At risk are those who are not certain of voting Conservative and have a clear second choice party which they rate at 51 or above. A plurality of these would go to the Liberals, but this category also includes those who would consider the People's Party and the NDP.



In terms of the next election, then, we have identified three critical groups:

- **Persuadable Liberals**, who put their chances of voting Liberal next time at between 51 and 99/100 and have the Conservatives as a clear second choice with a score of 25 or above. They comprise 17% of the current Liberal vote.
- **Left flank** voters, who currently put the Liberals as their most highly rated choice (up to 99/100) but who retain an allegiance to the NDP, putting that party a clear second with a rating of 60 or above. They comprise 15% of the current Liberal vote.
- **Vulnerable Conservatives**, who put their chances of voting Conservative next time between 51 and 99/100, but have a clear second choice rated at 51 or above. They constitute 32% of the current Conservative vote.

This is where these groups, and other important voter types, appear on our political map:

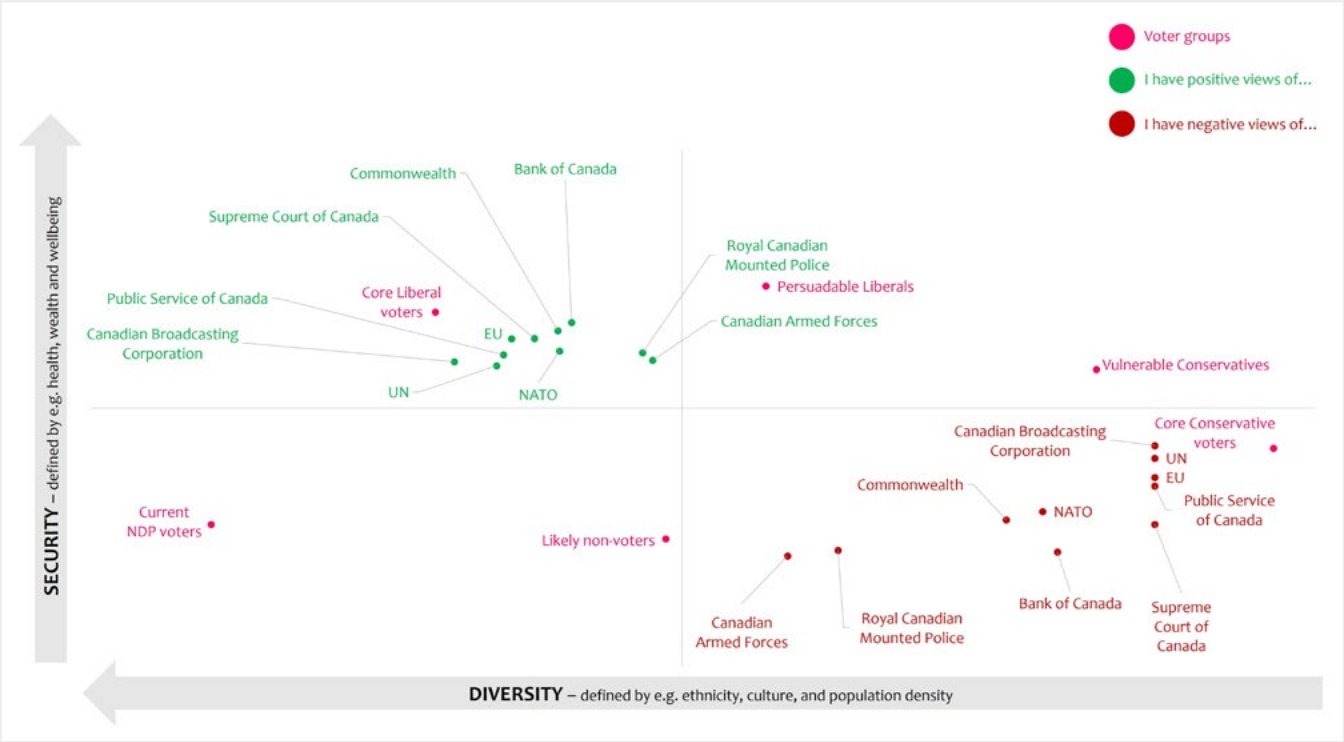
Here we see that core Liberal voters are at around the “10.30” position, with the party’s two vulnerable groups about 90 minutes in either direction: the Left Flank at “9 o’clock” and the Persuadable Liberals just after “12 o’clock”, in roughly the same territory as 2025 Conservative voters who now lean towards the Liberals. It is also clear that the Liberal voting coalition covers a lot more ground than the Conservatives: Vulnerable Conservatives are at around “2.30”, very close to the party’s core vote. Unsurprisingly, the Left Flank is diametrically opposite the Conservative vote on the map. For the Conservatives to chase these voters would be futile; their importance lies in their potential to divide the Carney coalition.

On the whole, the Conservatives are at around “3 o’clock” on the map. This is also where we find the voters who lean towards the party having voted Liberal in 2025. This suggests they are not making inroads into other parts of the map, but picking up voters we might expect to return to the fold. To expand their coalition, the Conservatives will need to decide between appealing to voters further in the bottom right quadrant towards “6 o’clock”, and gaining ground in the top right quadrant between “12.00” and “1.30”.



Pushing towards the bottom left would be difficult for at least two reasons. First, pushing towards the bottom left would mean fighting the NDP on their home territory, for voters who are the most resistant to the Conservatives (and, at the bottom of the map, those who are least likely to vote at all). Second, it would mean building support among voters who have negative views of all Canadian institutions, which even if successful would make for a very unstable governing coalition.

A more fruitful strategy would seek to gain ground in the top right quadrant, where we find both the Vulnerable Conservatives at risk of peeling away from the coalition, and the Persuadable Liberals, who might be brought on board. This territory is also where we find the voters most likely to be concerned about issues on which the Conservatives could make progress.



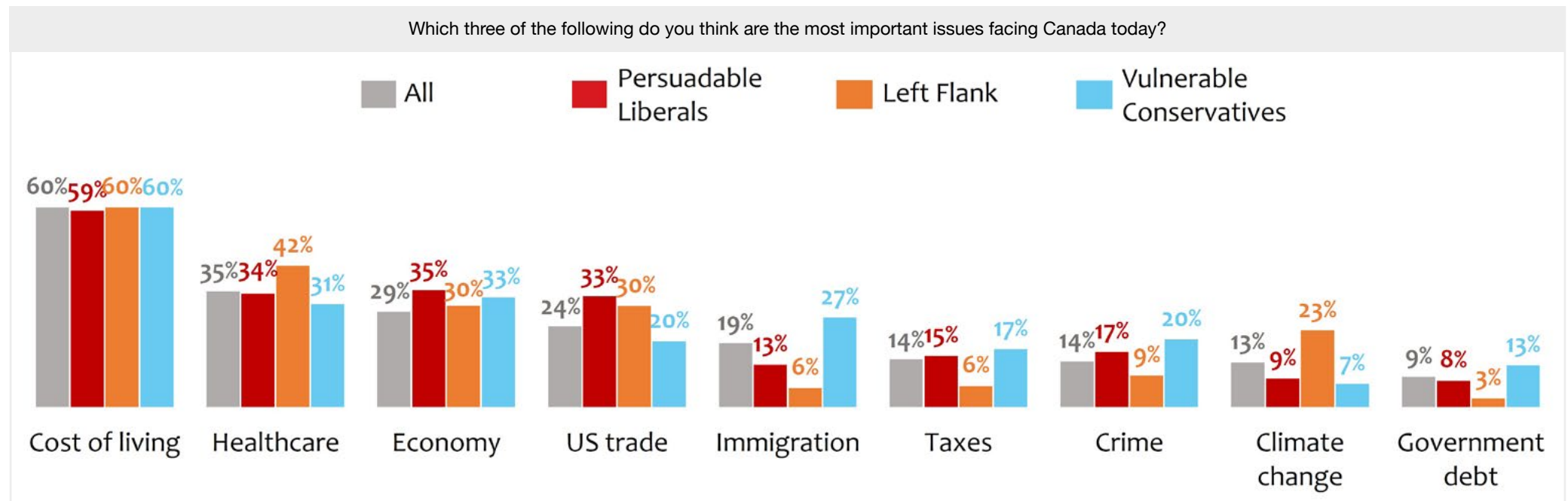
THE KEY ISSUES

As we saw in an earlier chapter, Canadians name the cost of living as the most important issue facing the country. As well as being chosen in the top three priorities by 60% of all voters, it is named by 59% of Persuadable Liberals, 60% of the Left Flank and 60% of Vulnerable Conservatives. Below we also see the equivalent scores for eight other issues.

As we can see, Persuadable Liberals are especially concerned about trade with the US. In this group who prioritise this issue, 89% currently consider the Liberals the best party to deal with it; only 9% say the Conservatives would handle it more effectively. With more than four fifths of the population saying US relations will be at least as important an issue in 2029 as it is now, the question is not likely to fade with time.

In Australia as well as Canada, incumbent governments pulled off upset victories by framing their national elections as referendums on President Trump's trade policies and portraying the centre-right party as a proxy for the Americans. Allowing the Liberals to repeat the trick would give them the opportunity to galvanise the Carney coalition and leave the Conservatives trapped at their previous ceiling, inviting the same result.

There are other issues on which the Conservatives could help disrupt the Liberal voting coalition and expand their own vote. On climate change, for example, the priorities of the Persuadable Liberals differ from those of the Left Flank. If the national discussion shifts to areas where the government will not go far enough to satisfy the left, including tactical former NDP voters, cracks could begin to open up in its coalition. On taxes and crime, the Persuadable Liberals are closer in outlook to the Vulnerable Conservatives than the left. If the Conservatives can win permission to talk about these issues among these voters, they could start to make headway.



THE LEADERSHIP QUESTION

Some have suggested that replacing Pierre Poilievre is the key to a successful Conservative challenge at the next election. Could this make the difference? Overall, it is true that while Carney polls better than the Liberals, the Conservative party polls better than its leader. The effect is more pronounced among the key voter groups (especially Persuadable Liberals).

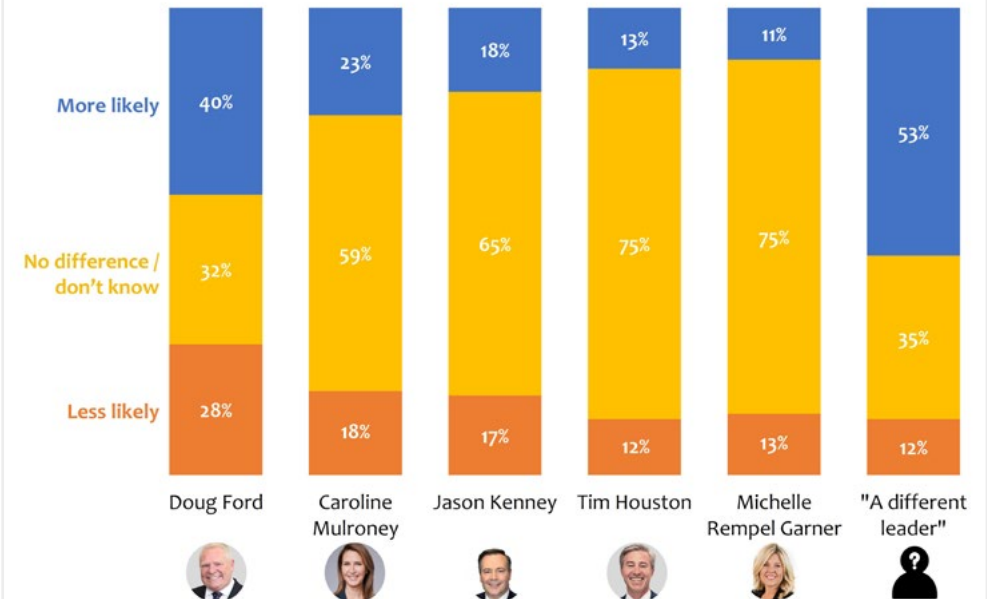
However, switching leadership would bring its own risks. When we asked people whether the Conservatives changing leader would increase, decrease or make no difference to their chances of voting for the party next time, 45% of Vulnerable Conservatives and 40% of the Left Flank said it would make them more likely to back the party. At the same time, 12% of Vulnerable Conservatives and 11% of the Left Flank said a change would make them less likely to vote Conservative.

In contrast, however, more than half (53%) of Persuadable Liberals said they would be more likely to vote Conservative under a different leader, as against 12% who said they would be less likely. However, only 17% of Persuadable Liberals say they would be “much more likely” to switch their vote; the other 36% are only “somewhat” more likely to do so.

Introducing actual names into the equation is also revealing. Among Persuadable Liberals, the more-likely to less-likely ratio shrinks from 5-1 to less than 2-1. Indeed, any named alternative trades potential gains among target groups with losses among the base.

Regardless of your overall view, would you be more likely or less likely to consider voting Conservative at the next election if the party were led by any of the following, or would it make no difference?

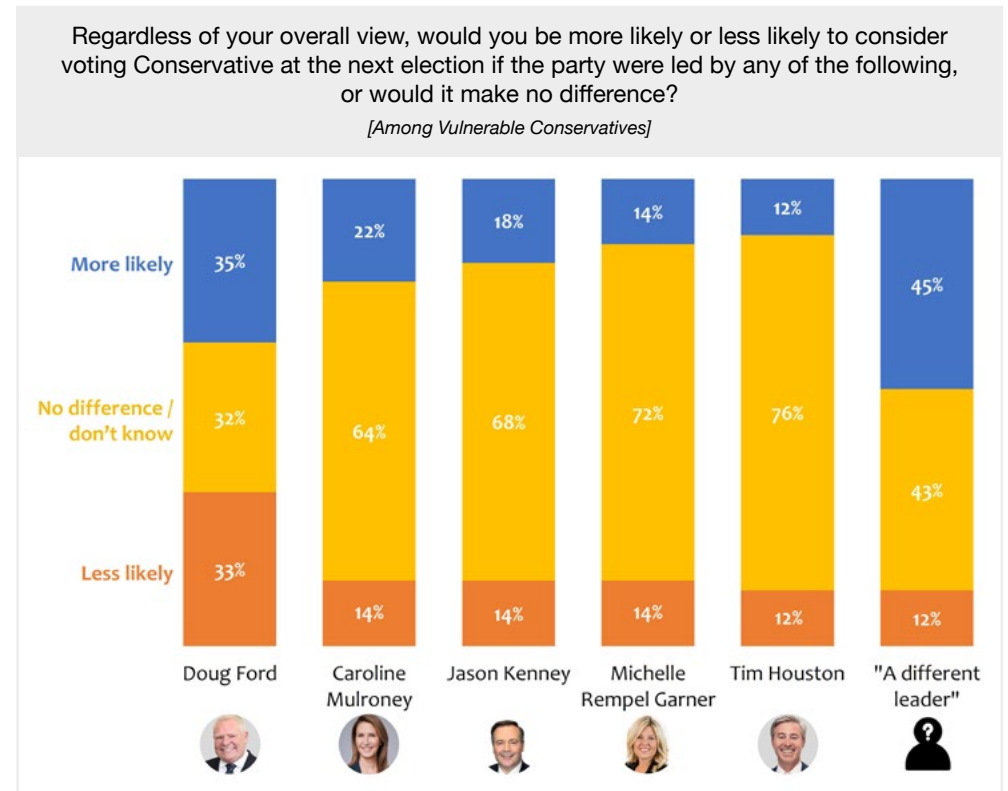
[Among Persuadable Liberals]



Doug Ford is the best-known figure included in the question and has potentially strong credentials on dealing with the Trump tariffs. If these figures indicate a potential net positive (albeit with only a minority saying they would be more likely to switch to the Conservatives under his leadership), we can also see how Vulnerable Conservatives react to the same question.

Vulnerable Conservatives divide fairly evenly on all of the theoretical putative leaders named. When the disruption and infighting associated with a leadership contest are taken into account, these voters may end up feeling no more positive about the Conservative party than they did before.

To complete the picture, core Conservative voters are more likely to say they would be less inclined to vote for the party under each of these theoretical contenders than that they would be more likely to do so. Changing leader could therefore mean alienating core supporters while at best standing still among softer voters and potential converts. The costs are therefore clearer than the uncertain reward.



ABOUT LORD ASHCROFT

LORD ASHCROFT KCMG PC is an international businessman, philanthropist, author and pollster. He is a former treasurer and deputy chairman of the UK Conservative Party. He is also honorary chairman and a former treasurer of the International Democracy Union. He is founder and chairman of the board of trustees of Crimestoppers, vice-patron of the Intelligence Corps Museum, chairman of the trustees of Ashcroft Technology Academy, a senior fellow of the International Strategic Studies Association, former chancellor of Anglia Ruskin University and a former trustee of Imperial War Museums.

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- Hopes and Fears: Trump, Clinton, the Voters and the Future
- Well, You Did Ask: Why the UK Voted to Leave the EU
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