



Themes Of the 45th Federal Election

2025-03-26

About Pallas Data

Pallas Data is a market research firm based in Toronto, ON. We are experienced researchers and data experts committed to delivering the best value to our clients by leveraging the highest industry standards and our leading expertise. Our mission is to harness data to empower our clients with accurate and actionable insights and analysis, enabling them to make informed decisions that drive growth and maximize their competitive advantage.

For more information, please contact:

Dr. Joseph Angolano, founder and CEO

Email: joseph@pallas-data.ca

Telephone: (647)-894-1552

Methodology

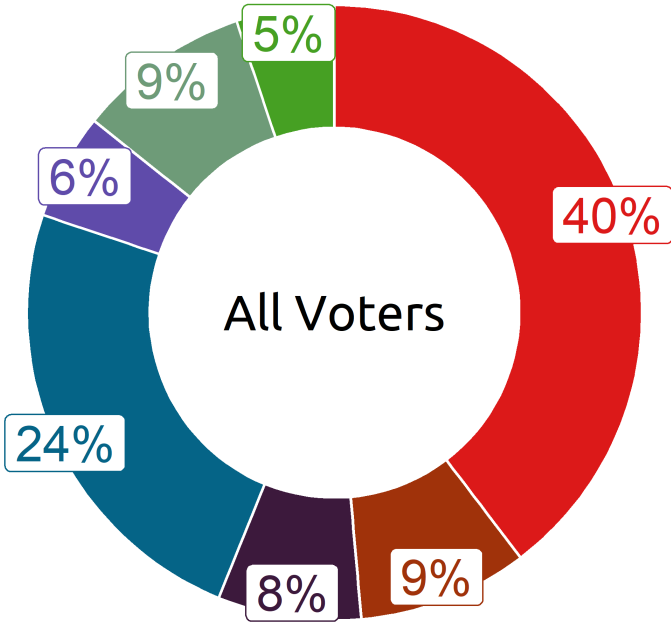
The analysis in this report is based on results of a survey conducted on March 22nd, 2025 among a sample of 1225 adults, 18 years of age or older, living in Canada and are eligible to vote in federal elections. The survey was conducted using automated telephone interviews using Interactive Voice Recording technology (IVR). Respondents were interviewed on landlines and cellular phones. The sample was weighted by age, gender, and region according to the 2021 Census. The survey is intended to represent the adult population in Canada.

The margin of error for the poll is $\pm 2.8\%$, at the 95% confidence level. Margins of error are higher in each subsample.

Totals may not add up to 100% due to rounding.

Top Issue

What issue do you think is the most important in the upcoming federal election?

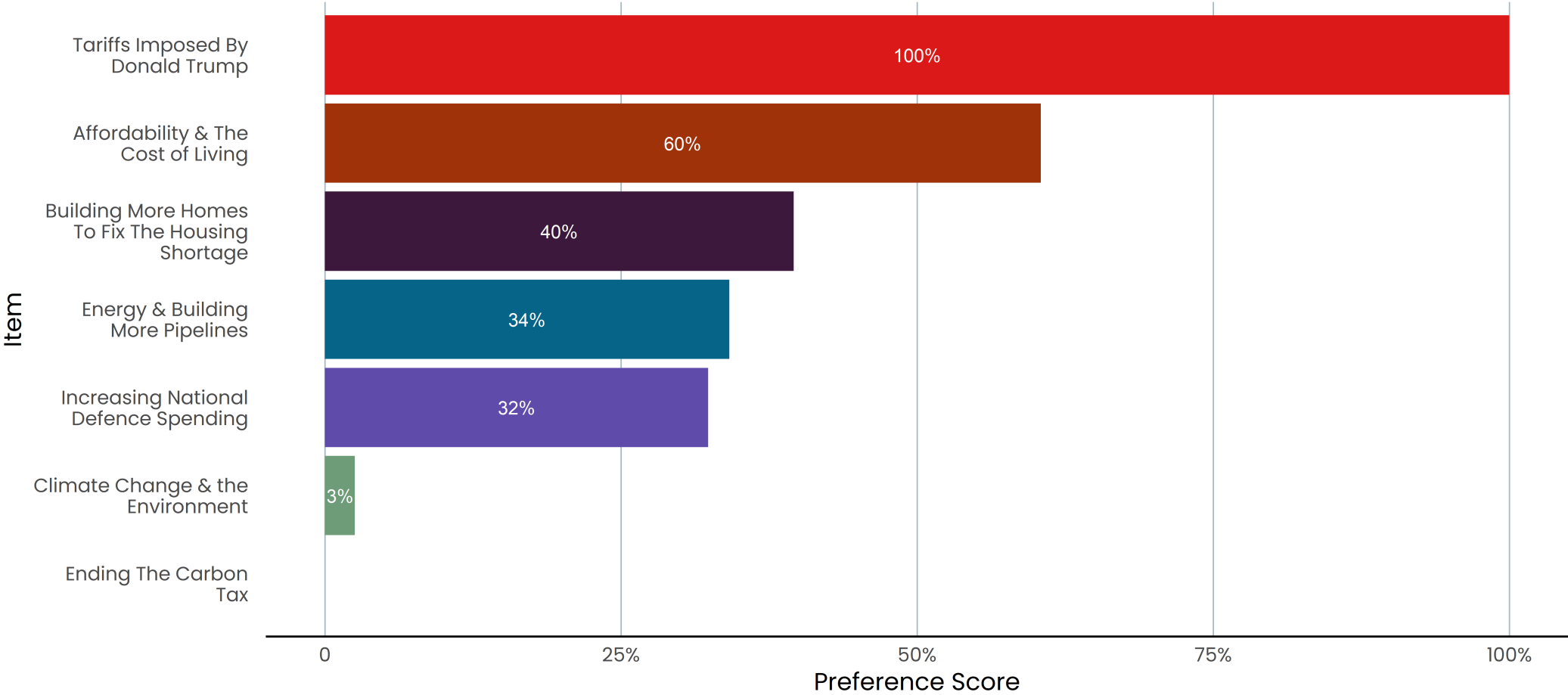


- Response
- Tariffs Imposed By Donald Trump
 - Building More Homes To Fix The Housing Shortage
 - Increasing National Defence Spending
 - Affordability & The Cost of Living
 - Ending The Carbon Tax
 - Energy & Building More Pipelines
 - Climate Change & the Environment

Top Issue: MaxDiff Analysis

What issue do you think is the most/least important in the upcoming federal election?

MaxDiff Analysis



MaxDiff Analysis: What is it?

We used a MaxDiff analysis to figure out what issues really matter to Canadians in this election. MaxDiff asks respondents to pick their most important and least important issue.

MaxDiff forces respondents to make trade-offs between items, which reveals true preferences more effectively than rating scales. This prevents the “everything is important” problem where respondents rate all items highly.

In this case, the Trump tariffs is the dominant issue, with affordability coming in as a strong second issue. Building more homes, energy & pipelines, and increasing national defence spending with relatively balanced most/least selections.

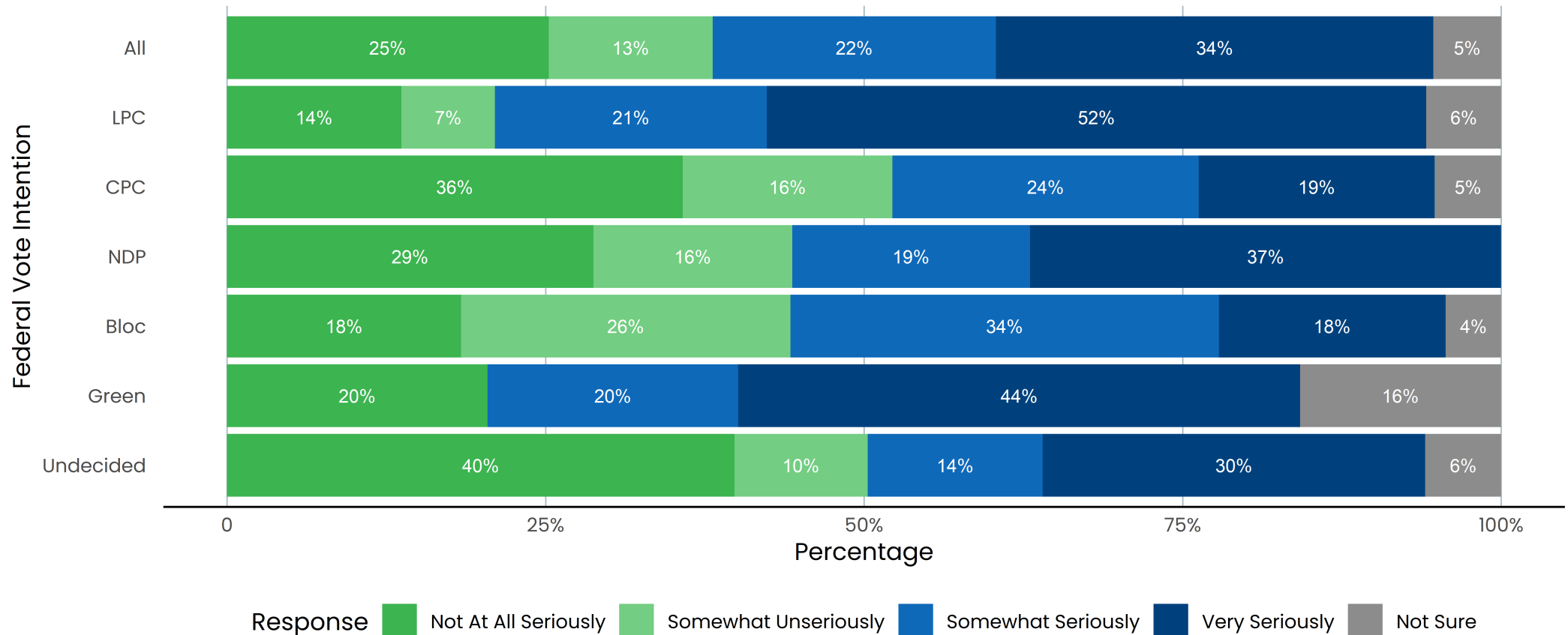
Climate change, the environment, and the carbon tax were chosen as least important far more than often than most important.

The large gap between the top and bottom issues suggests a strongly polarized set of preferences.

Canadians Take Trump Threats Seriously

How seriously do you take President Donald Trump's talk about annexing Canada and making it the 51st state?

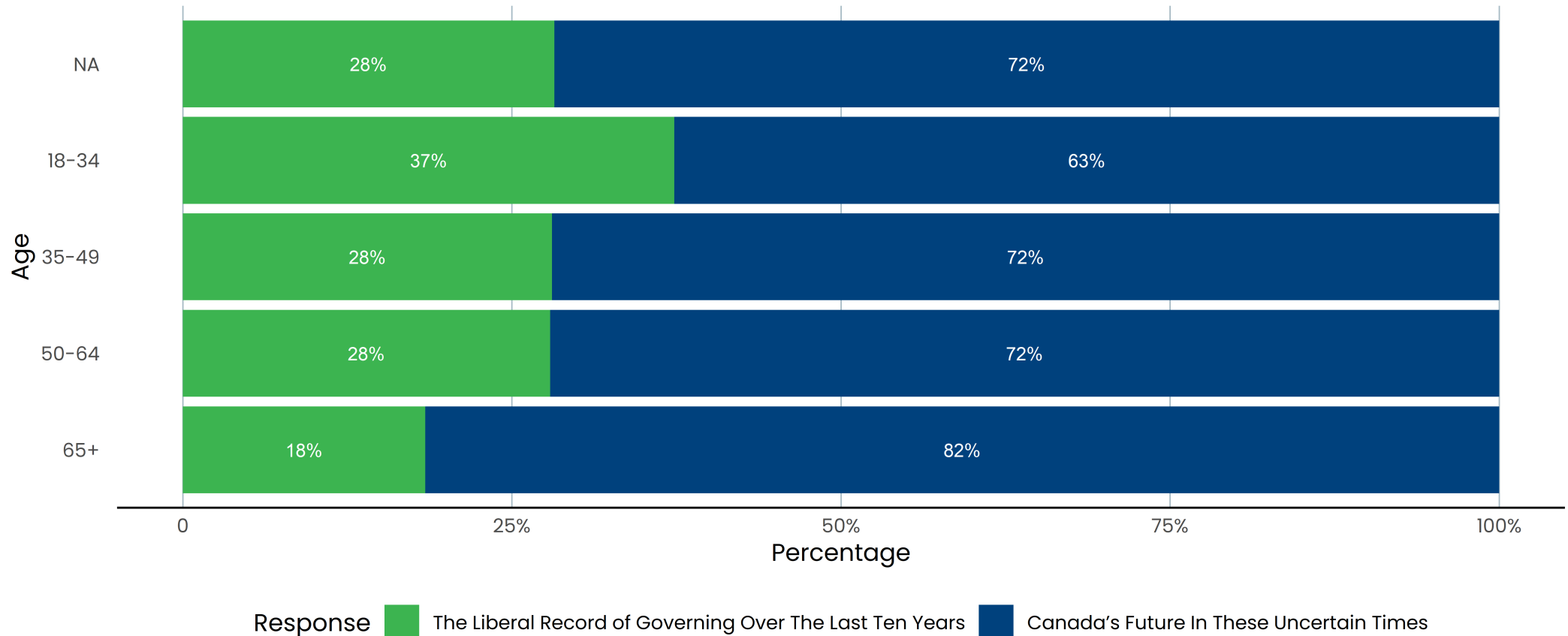
broken out by federal vote intention



Let's Talk About the Future, Not The Past

If you had to choose, which of the following themes do you think the upcoming federal election should be about?

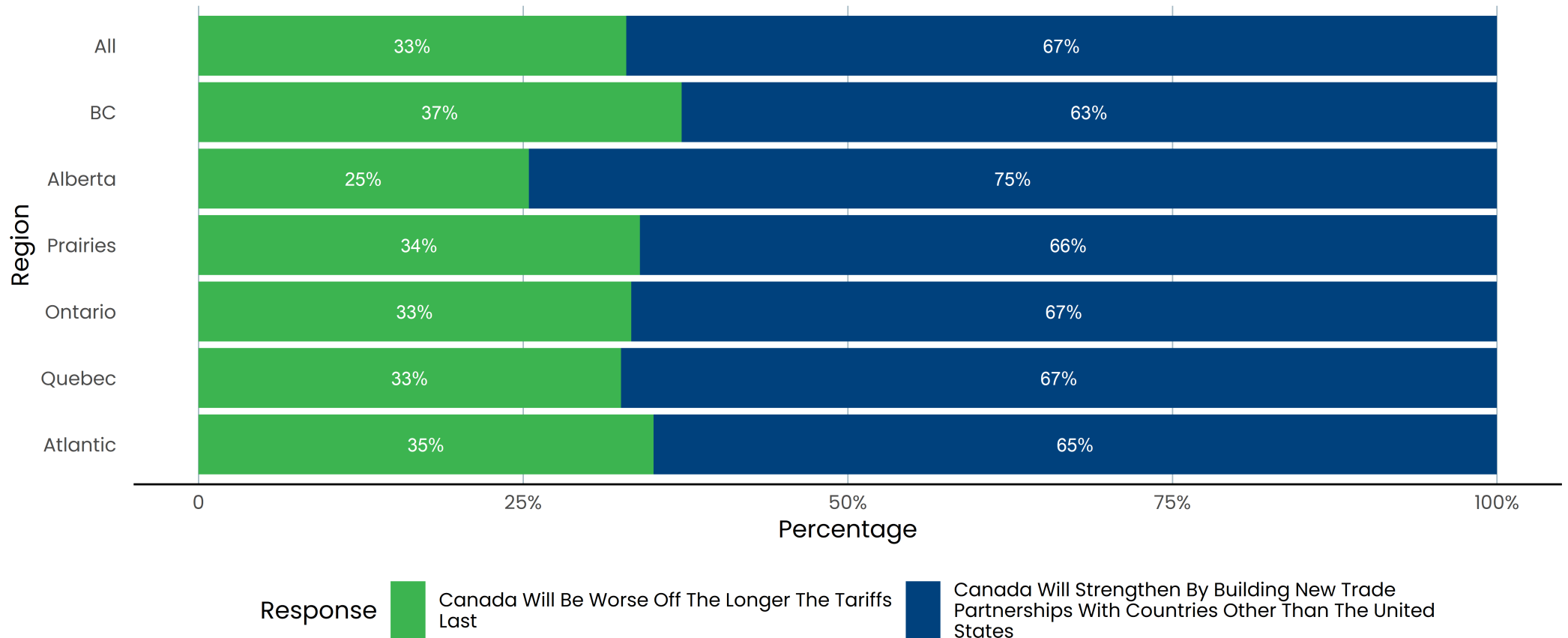
broken out by age group



Canada Can Get Out Of This Better

Again if you had to choose, which statement most closely matches your thoughts about the impact the tariffs will have on the Canadian economy?

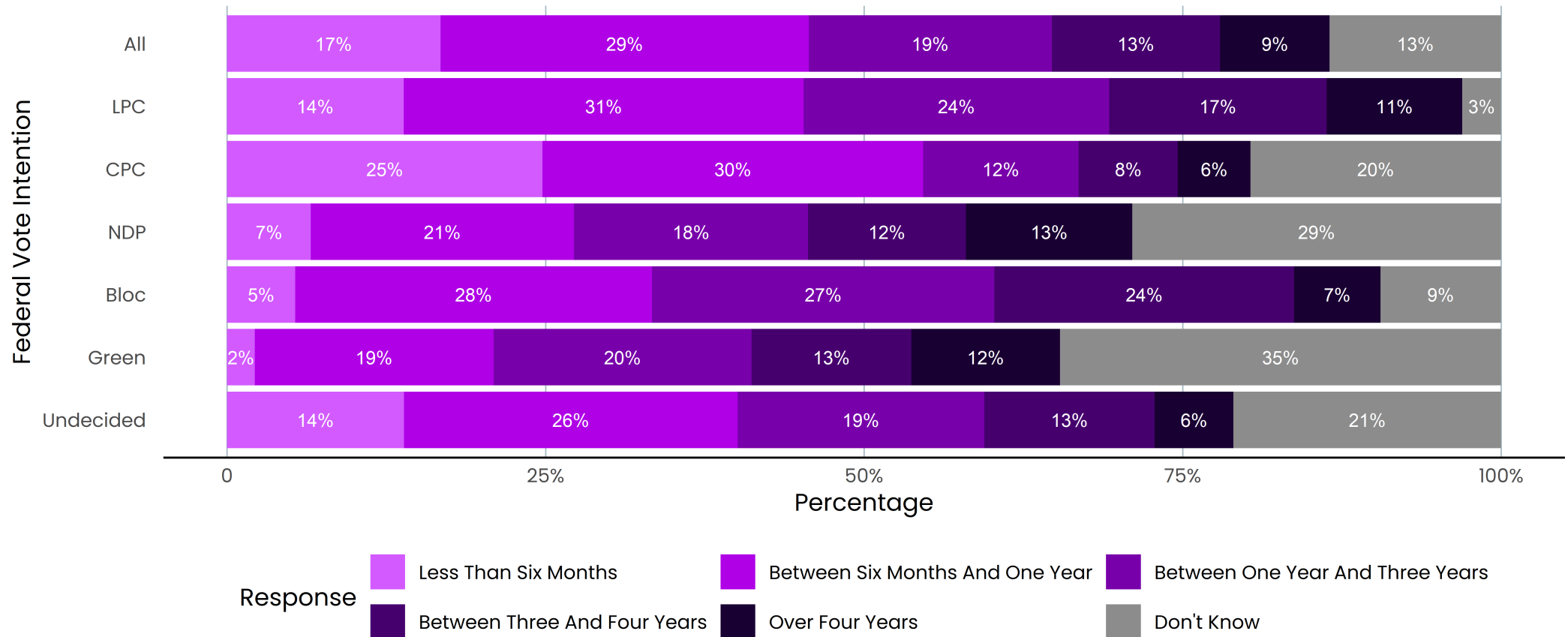
broken out by age group



Canadians Expect Tariffs To Last

How seriously do you take President Donald Trump's talk about annexing Canada and making it the 51st state?

broken out by federal vote intention



Tables

What issue do you think is the most important in the upcoming federal election? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Tariffs Imposed By Donald Trump	39.7%	38.9%	40.4%	30%	26%	47.4%	56.2%	37.8%	27.9%	26.1%	43.4%	46.1%	32.7%
Building More Homes To Fix The Housing Shortage	9%	11.1%	6.9%	14.9%	6.7%	6%	7.8%	6.2%	1.7%	8.3%	9.6%	13%	9.6%
Increasing National Defence Spending	7.5%	7.5%	7.6%	11.2%	8.8%	4%	6%	10.2%	9.5%	5.2%	5.1%	10.4%	4.9%
Affordability & The Cost of Living	24%	20.4%	27.4%	30.3%	32.3%	19%	13.7%	26.5%	27.9%	33%	24%	15.4%	33.4%
Ending The Carbon Tax	5.6%	5.8%	5.4%	4.3%	5.2%	9.4%	3.3%	5.1%	13.8%	6.5%	6.1%	1.1%	4.2%
Energy & Building More Pipelines	9.1%	12.2%	6.2%	4.1%	13.5%	11.3%	8%	10.4%	17.2%	17.9%	7%	6.2%	6.4%
Climate Change & the Environment	5.2%	4.2%	6.1%	5.2%	7.6%	3%	5%	3.8%	2.1%	3%	4.8%	7.6%	8.9%
Unweighted Frequency	1225	684	541	121	216	357	531	162	97	91	433	289	153
Weighted Frequency	1225	598	627	327	297	312	289	167	139	80	470	286	84

Tables

What issue do you think is the most important in the upcoming federal election? [2]

	Current Federal Vote Intention								
	Total	LPC	CPC	NDP	Bloc	Green	PPC	Other	UD
Tariffs Imposed By Donald Trump	39.7%	62.9%	18.8%	13.3%	50.4%	36%	10.1%	0%	44.7%
Building More Homes To Fix The Housing Shortage	9%	8.6%	6.2%	26%	12.4%	8.6%	0%	0%	5.4%
Increasing National Defence Spending	7.5%	5.2%	9.7%	2.6%	15.4%	23.5%	0%	10.8%	3.9%
Affordability & The Cost of Living	24%	15.1%	33.6%	32%	10.1%	24.7%	29.5%	54.3%	27.7%
Ending The Carbon Tax	5.6%	1.2%	11.2%	0%	0.9%	2%	24%	9.4%	8.6%
Energy & Building More Pipelines	9.1%	1.4%	20.2%	2%	1.7%	0%	36.3%	12.7%	6.3%
Climate Change & the Environment	5.2%	5.6%	0.4%	24%	9.2%	5.2%	0%	12.7%	3.4%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
Weighted Frequency	1225	488	437	94	83	27	24	4	68

Tables

We're now going to read you the same list again. What issue do you think is the least important in the upcoming federal election? [MaxDiff]

	Issue	Most Count	Least Count	Net Score	Best/Worst Ratio	Scaled Score
1	Tariffs Imposed By Donald Trump	557	70	487	7.9571429	100.000000
4	Affordability & The Cost of Living	246	72	174	3.4166667	60.429836
2	Building More Homes To Fix The Housing Shortage	100	91	9	1.0989011	39.570164
6	Energy & Building More Pipelines	118	152	-34	0.7763158	34.134008
3	Increasing National Defence Spending	77	125	-48	0.6160000	32.364096
7	Climate Change & the Environment	60	344	-284	0.1744186	2.528445
5	Ending The Carbon Tax	67	371	-304	0.1805930	0.000000

Tables

We're now going to read you the same list again. What issue do you think is the least important in the upcoming federal election? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Tariffs Imposed By Donald Trump	6%	5%	6.9%	4.8%	7.6%	5.6%	5.9%	7.3%	7.5%	9.1%	6.3%	4%	2.5%
Building More Homes To Fix The Housing Shortage	6.4%	6.9%	5.9%	4.2%	5.1%	8%	8.5%	5.4%	11.2%	4.6%	6.2%	5.7%	5.3%
Increasing National Defence Spending	11.2%	11.6%	10.9%	14.9%	12.4%	7.5%	10%	17.7%	8%	10.2%	10.8%	9.9%	11.8%
Affordability & The Cost of Living	4.8%	4.2%	5.4%	4.5%	1.2%	4.4%	9.3%	6.6%	5.1%	1.9%	5.2%	3.8%	4.9%
Ending The Carbon Tax	28.6%	27.1%	30.1%	26.2%	26.6%	30%	31.8%	20.8%	10.4%	25%	31.4%	35.6%	38.2%
Energy & Building More Pipelines	12.6%	8.3%	16.6%	11.2%	12.8%	12.8%	13.8%	15.2%	9.5%	11.7%	9.4%	18.4%	11.4%
Climate Change & the Environment	30.4%	37%	24.1%	34.2%	34.2%	31.7%	20.7%	27.1%	48.3%	37.5%	30.7%	22.5%	25.9%
Unweighted Frequency	1225	684	541	121	216	357	531	162	97	91	433	289	153
Weighted Frequency	1225	598	627	327	297	312	289	167	139	80	470	286	84

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We're now going to read you the same list again. What issue do you think is the least important in the upcoming federal election? [2]

	Total	Current Federal Vote Intention							
		LPC	CPC	NDP	Bloc	Green	PPC	Other	UD
Tariffs Imposed By Donald Trump	6%	1.6%	9.1%	8.9%	0%	28.5%	18.7%	23.6%	5.7%
Building More Homes To Fix The Housing Shortage	6.4%	6.9%	8%	0.8%	3.5%	3.3%	2%	0%	7.1%
Increasing National Defence Spending	11.2%	11.6%	9.3%	22.5%	5.5%	14.5%	0%	67%	11.6%
Affordability & The Cost of Living	4.8%	5.6%	3.4%	2.2%	5.8%	6.5%	2.9%	0%	11.4%
Ending The Carbon Tax	28.6%	42%	8.5%	47.7%	43%	21.9%	5.5%	0%	30.7%
Energy & Building More Pipelines	12.6%	18.7%	4.3%	14.1%	27.3%	22.6%	0%	0%	3.8%
Climate Change & the Environment	30.4%	13.7%	57.5%	3.7%	14.9%	2.5%	71%	9.4%	29.6%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
Weighted Frequency	1225	488	437	94	83	27	24	4	68

Tables

How seriously do you take President Donald Trump's talk about annexing Canada and making it the 51st state? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Not At All Seriously	25.3%	28.6%	22.1%	30.3%	22.9%	23.5%	23.9%	20%	34.8%	27.8%	24.4%	24.5%	24.7%
Somewhat Unseriously	12.9%	15.5%	10.4%	14.4%	14%	12.8%	10.1%	11.7%	9.2%	14.2%	10.1%	19.8%	11.9%
Somewhat Seriously	22.2%	21.2%	23.2%	19%	25.8%	21.4%	23.2%	18.5%	23.6%	24%	22.3%	22.8%	23.4%
Very Seriously	34.3%	30.4%	38.1%	25.8%	33.4%	40%	38.8%	40.7%	24.1%	28.7%	38.3%	29.7%	37.7%
Not Sure	5.3%	4.3%	6.3%	10.5%	4%	2.3%	4%	9.1%	8.3%	5.3%	4.9%	3.3%	2.3%
Unweighted Frequency	1225	684	541	121	216	357	531	162	97	91	433	289	153
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How seriously do you take President Donald Trump's talk about annexing Canada and making it the 51st state? [2]

	Current Federal Vote Intention								
	Total	LPC	CPC	NDP	Bloc	Green	PPC	Other	UD
Not At All Seriously	25.3%	13.7%	35.8%	28.8%	18.4%	20.5%	44.4%	18.8%	39.8%
Somewhat Unseriously	12.9%	7.3%	16.5%	15.6%	25.8%	0%	26.2%	10.8%	10.5%
Somewhat Seriously	22.2%	21.3%	24%	18.7%	33.6%	19.7%	13.2%	0%	13.7%
Very Seriously	34.3%	51.8%	18.5%	37%	17.8%	44.1%	8.6%	70.3%	30%
Not Sure	5.3%	5.9%	5.2%	0%	4.4%	15.8%	7.6%	0%	6%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
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If you had to choose, which of the following themes do you think the upcoming federal election should be about? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
The Liberal Record of Governing Over The Last Ten Years	28.2%	35.8%	21%	37.4%	28.1%	27.9%	18.4%	21.4%	30.8%	34%	32.2%	24.1%	23.7%
Canada's Future In These Uncertain Times	71.8%	64.2%	79%	62.6%	71.9%	72.1%	81.6%	78.6%	69.2%	66%	67.8%	75.9%	76.3%
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	Current Federal Vote Intention								
	Total	LPC	CPC	NDP	Bloc	Green	PPC	Other	UD
The Liberal Record of Governing Over The Last Ten Years	28.2%	7.6%	53.8%	14.1%	30.8%	13.2%	68.5%	18.8%	21%
Canada's Future In These Uncertain Times	71.8%	92.4%	46.2%	85.9%	69.2%	86.8%	31.5%	81.2%	79%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
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Again if you had to choose, which statement most closely matches your thoughts about the impact the tariffs will have on the Canadian economy? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Canada Will Be Worse Off The Longer The Tariffs Last	32.9%	38.3%	27.8%	35.3%	36.5%	30%	29.9%	37.2%	25.5%	34%	33.3%	32.5%	35%
Canada Will Strengthen By Building New Trade Partnerships With Countries Other Than The United States	67.1%	61.7%	72.2%	64.7%	63.5%	70%	70.1%	62.8%	74.5%	66%	66.7%	67.5%	65%
Unweighted Frequency	1225	684	541	121	216	357	531	162	97	91	433	289	153
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	Current Federal Vote Intention								
	Total	LPC	CPC	NDP	Bloc	Green	PPC	Other	UD
Canada Will Be Worse Off The Longer The Tariffs Last	32.9%	27.3%	40.6%	25.5%	23.6%	37.2%	73%	34.9%	29.6%
Canada Will Strengthen By Building New Trade Partnerships With Countries Other Than The United States	67.1%	72.7%	59.4%	74.5%	76.4%	62.8%	27%	65.1%	70.4%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
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How long do you think this trade dispute between the United States and Canada will last? [1]

	Total	Gender		Age				Region					
		Male	Female	18-34	35-49	50-64	65+	BC	Alberta	Prairies	Ontario	Quebec	Atlantic
Less Than Six Months	16.8%	18.8%	14.8%	15.3%	17.3%	18.5%	16%	14.8%	27.8%	15.4%	16.2%	12%	23%
Between Six Months And One Year	28.9%	33.9%	24.2%	27.4%	25.2%	31.9%	31.3%	20.4%	35.8%	40.2%	27.3%	28.1%	35.4%
Between One Year And Three Years	19.1%	21.2%	17%	14.2%	16.2%	21.5%	25%	21.7%	14.5%	20.3%	16.5%	24.2%	17.1%
Between Three And Four Years	13.2%	13%	13.3%	7.9%	14.9%	15.3%	15.1%	10.4%	5.9%	17.3%	12.6%	18.9%	11.3%
Over Four Years	8.6%	10.2%	7.1%	8.5%	9.4%	8.6%	7.8%	12.2%	3.1%	3.3%	11.3%	6.3%	8.6%
Don't Know	13.5%	2.9%	23.5%	26.7%	16.9%	4.2%	4.8%	20.6%	12.9%	3.5%	16.1%	10.6%	4.6%
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Less Than Six Months	16.8%	13.9%	24.8%	6.6%	5.4%	2.2%	33.9%	12.7%	13.9%
Between Six Months And One Year	28.9%	31.4%	29.9%	20.7%	28%	18.7%	16.9%	20.3%	26.2%
Between One Year And Three Years	19.1%	24%	12.2%	18.4%	26.9%	20.3%	19.6%	12.7%	19.4%
Between Three And Four Years	13.2%	17.1%	7.8%	12.4%	23.5%	12.5%	3.2%	0%	13.4%
Over Four Years	8.6%	10.6%	5.7%	13.1%	6.8%	11.7%	12.1%	9.4%	6.2%
Don't Know	13.5%	3.1%	19.7%	28.9%	9.5%	34.6%	14.3%	44.9%	21%
Unweighted Frequency	1225	537	399	79	82	23	22	6	77
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