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CANADA

**2025 SPRING
SERIES**

Ballot Questions

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For Survey Research

Environics Institute

For Survey Research

The Environics Institute for Survey Research was established by Michael Adams in 2006 with a mandate to conduct in-depth public opinion and social research on the issues shaping Canada's future. It is through such research that Canadians can better understand themselves and their changing society.

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As part of its Focus Canada public opinion research program (launched in 1976), the Environics Institute examined the ballot questions for the April 2025 federal election by asking which issue mattered most to voters. The survey is based on telephone interviews conducted (via landline and cellphones) with 2,000 Canadians between May 5 and 18, 2025. A sample of this size drawn from the population produces results accurate to within plus or minus 2.2 percentage points in 19 out of 20 samples.

For more information about this research, contact [Andrew Parkin](#).

Contents

Introduction	<u>1</u>
Most important election issue	<u>3</u>
Differences between older and younger voters	<u>6</u>

Introduction

When discussing elections, political analysts and commentators often focus on what they call the “ballot question” - the main issue that voters have on their minds when they decide which party or leader to support. Political parties try to steer the ballot question in a direction that highlights their strengths, as well as the weaknesses of their opponents. But, sometimes, events conspire to shift ballot questions in sudden and unexpected ways.

This is what occurred in the run-up to the 2025 Canadian federal election. Until the start of the new year, the frame of the election appeared set: voters would be asked to choose the party that would respond best to the issue of the cost of living, which had come to the fore following a period of rising prices and escalating housing costs. This issue clearly favoured the opposition Conservative Party. This framing, however, was disrupted by two developments in January: the resignation of Prime Minister Justin Trudeau and the second inauguration of U.S. President Donald Trump.

Upon his return to the White House, President Trump began to impose tariffs on Canadian exports to the U.S., and to express his preference for Canada to become his country’s 51st state. Soon afterwards, the governing Liberal Party chose Mark Carney as their new leader, and as Canada’s new prime minister. The election campaign was then launched with the Liberal Party attempting to re-set the ballot question in terms of which leader would be best able to push back against the U.S. president’s aggressive agenda.



To explore how these events affected the April 2025 federal election, the spring Focus Canada survey asked voters to identify which issue was the most important to them personally in choosing which party to support.

The results show that, while many voters were motivated by their concerns about Canada-U.S. relations and the American president, these issues did not completely displace economic ones. Alongside these issues, leadership was also an important factor. The relative importance of each of these issues, however, varied significantly among different groups of voters. Economic and affordability issues appealed more to Conservative Party supporters, while Liberal Party supporters were more focused on relations with the United States. There was also a significant difference in the preoccupations of different generations, with younger voters being much more focused on the economy and the cost of living.

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Most important election issue

Here are the answers to the question about which issue was most important for voters in choosing which party to support. The question was open-ended, meaning that people could answer in their own words rather than selecting from a list of possible items. Only one answer was allowed; while voters might have had many concerns, the survey asked them to name the single one that was most important in making their choice.

TABLE 1

Most important election issue¹

Which issue was the most important to you personally in choosing which party to vote for in this federal election?

Issue	%	Issue	%
The economy / unemployment / cost of living / inflation	25	Taxes	2
Canada-U.S. relations / U.S. tariffs / keeping Canada independent	17	Regional issues / regional identity	2
Leadership: liked the leader of the party I voted for	12	My local candidate	2
Leadership: disliked the leader of another party	8	Government spending / deficit and debt	1
Health care	4	Crime	1
Housing affordability / availability	3	Energy policy	1
Climate change / environment	3	Other issue	14
Immigration	2	Don't know	5

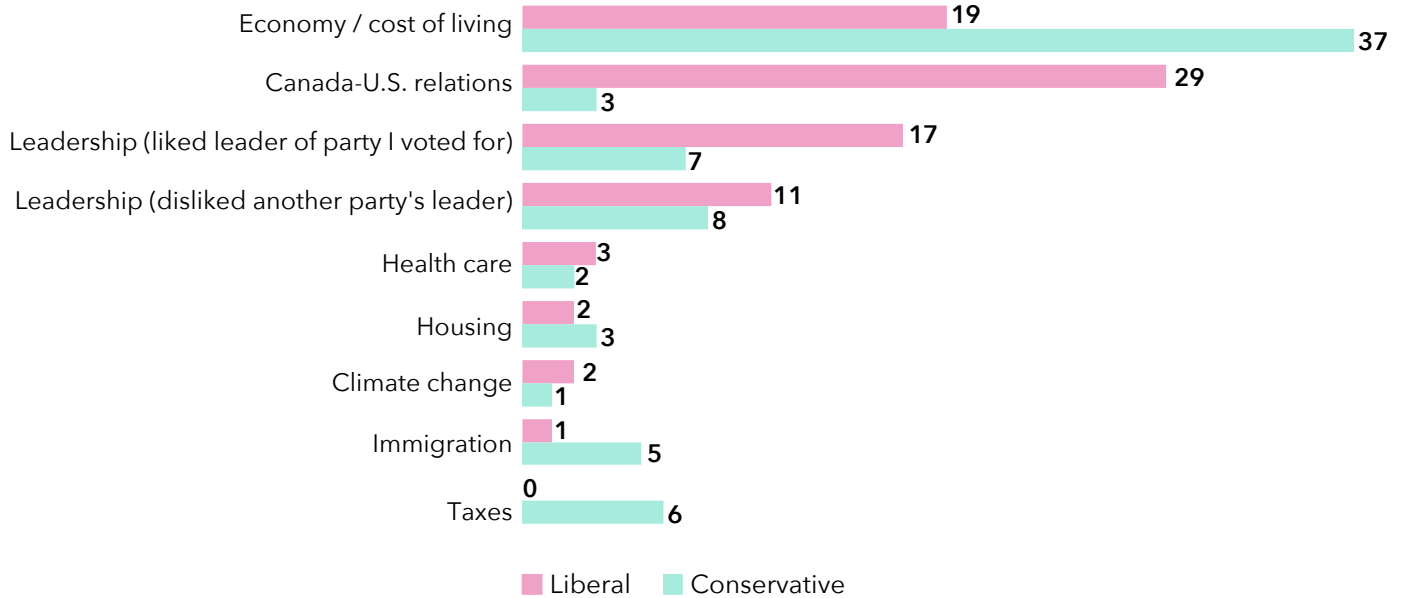
Overall, the issue most likely to be mentioned as most important by voters is the economy or the cost of living (25%). This is followed by Canada-U.S. relations (17%) and the positive appeal of the leader of the party they supported (12%). A total of one in five (20%) mention leadership, combining both the positive appeal of the leader they supported and the negative appeal of the leader of another party.

¹ This question was asked to those who said they voted in the federal election held on April 28, 2025. As is typically the case with public opinion surveys, the proportion of people who say they voted is higher than the actual turnout.

FIGURE 1

Which issue was the most important to you personally in choosing which party to vote for in this federal election?

Top mentions, by party voted for



Not surprisingly, however, the answers vary significantly depending on which party a person voted for. Liberal Party voters are more likely to mention Canada-U.S. issues (29%) than economic or cost of living issues (19%) as the one that was most important to them personally in choosing which party to vote for. The opposite is true for Conservative Party voters, who are much more likely to mention economic or cost of living issues (37%) than Canada-U.S. relations (3%).

Leadership was also more important to those who voted Liberal. The proportion of Liberal Party voters who say they were motivated by the fact that they liked their party's leader (17%) is twice the comparable proportion for Conservative Party voters (7%). Liberal Party voters (11%) are about as likely as Conservative Party voters (8%) to say their vote was motivated by a dislike for another party's leader. Combined, however, this means that leadership was the main reason behind the choice of 27 percent of Liberal Party voters, compared to 15 percent of Conservative Party voters.

There are some differences between men and women when it comes to the issue that was most important in deciding which party to vote for. Men (28%) are somewhat more likely than women (22%) to mention the economy or the cost of living. Women (18%) are as likely as men (16%) to mention Canada-U.S. relations, but are slightly more likely to mention either health care or climate change (a total of 9% of women mention one of these two issues, compared to 4% of men). Similar proportions of men (20%) and women (19%) mention leadership, though women tend to mention the positive appeal of the leader they voted for, while men tend to mention dislike of another party's leader.



Younger voters are more than twice as likely as older voters to mention the economy or the cost of living as their most important issue.

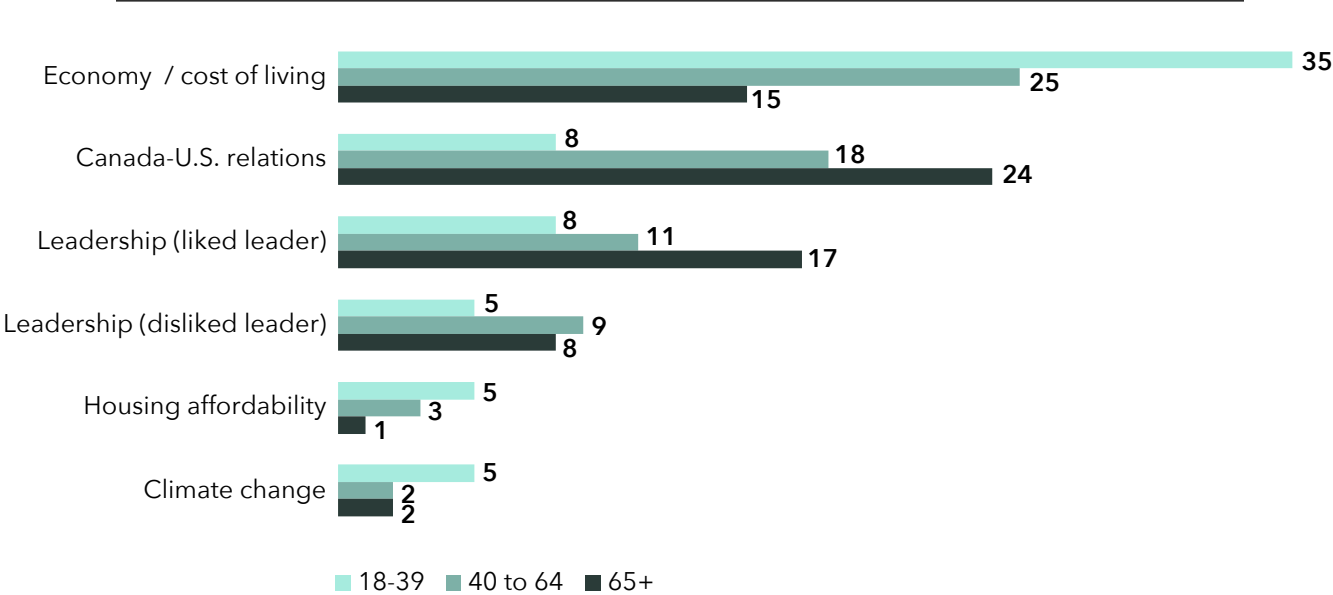
Differences between older and younger voters

Differences among age groups are even more striking than those between men and women. Younger voters (those between the ages of 18 and 39) are more than twice as likely as older voters (age 65 and older) to mention the economy or the cost of living as their most important issue (35%, compared to 15%). By contrast, older voters are three times more likely than younger voters to mention Canada-U.S. relations (24%, compared to 8%). Older voters are also twice as likely as younger voters to mention the positive appeal of the leader they supported (17%, compared to 8%).

FIGURE 2

Which issue was the most important to you personally in choosing which party to vote for in this federal election?

Top mentions, by age group

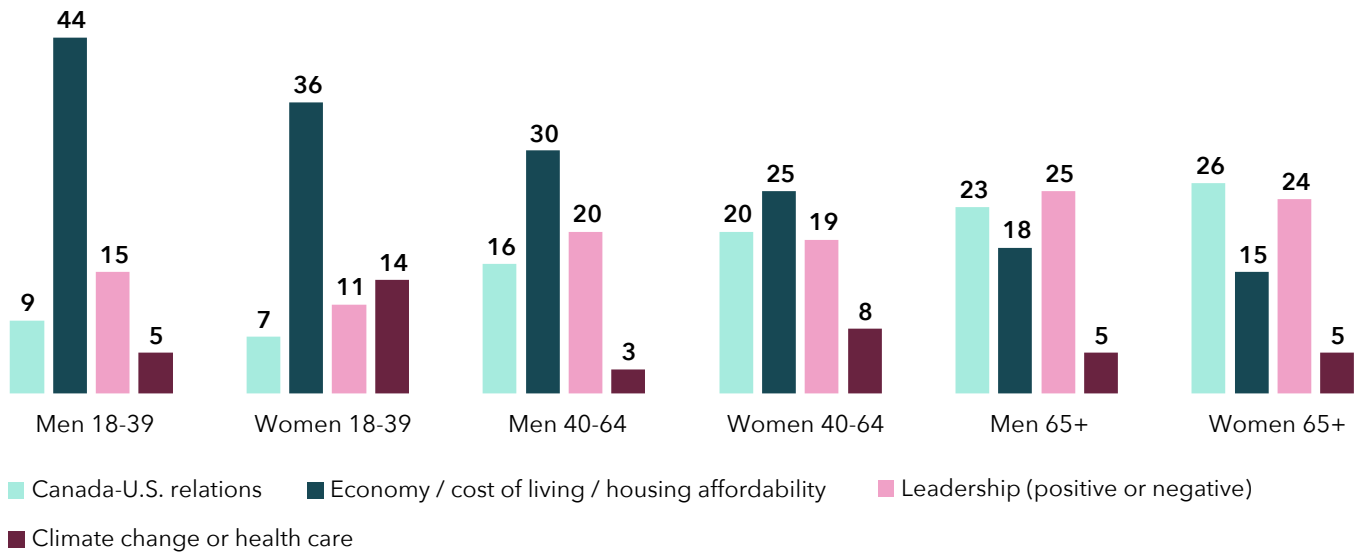


Issues relating to the economy and the cost of living are particularly important to younger men. This difference is even more stark if we include housing affordability in this group of economic concerns: 44 percent of men age 18 to 39 say these issues were most important to them personally in choosing which party to vote for in this federal election. Among younger men, the economy, the cost of living or housing affordability clearly overshadow concerns about Canada-U.S. relations or party leadership.

FIGURE 3

Which issue was the most important to you personally in choosing which party to vote for in this federal election?

Top mentions, by gender and age group



The opposite is true for older men: men age 65 and older are much more likely to mention concerns about Canada-U.S. relations or party leadership (a total of 48%) than they are to mention the economy, the cost of living or housing affordability (18%).

Economic and affordability issues are also more likely to be mentioned by younger women. However, a larger proportion of younger women (14%) also mention issues relating to climate change or health care.

In the end, then, the election was defined by competing ballot questions that varied in their appeal to different groups of voters, rather than a single issue overshadowing all others. Of particular interest are the concerns of younger voters, perhaps particularly those of younger men. The new Liberal government would be wise to find a way to ensure that their concerns about the economy, the cost of living and housing affordability are assuaged – and not sidelined – during the period dominated by the response to the trade war triggered by the U.S. president. Should the current tensions with the U.S. government fade or be resolved, the next election is likely to centre on affordability and the ability of younger voters to get ahead, which may come to benefit the opposition in the way that was expected before that framing was disrupted by the political events of January 2025.



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