Canadians give Mark Carney the advantage over Pierre Poilievre on negotiating with President Trump; two in three are concerned about a possible recession in the next year.

THE GLOBE AND MAIL*

LA PRESSE

NANOS

The objective of the research was to gauge the views of Canadians on the most significant issue influencing voter decisions in the upcoming federal election, the level of patriotism and feelings around the future of the Canada-US relations. The research also gauged the level of concern of a possible recession and President Trump threatening to make Canada the 51st State of the US, the level of support for Canada imposing dollar for dollar counter tariffs on US goods entering Canada and the views on the politician that would do the best job negotiating with US President Donald Trump.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,223 Canadians, 18 years of age or older, between March 29th and April 3rd , 2025 as part of an omnibus survey. The margin of error for this survey is ±2.8 percentage points, 19 times out of 20. An oversample was conducted in Quebec for a total of 402 interviews (n=207 in Greater Montreal; n=195 in rest of Quebec).

The statistical tabulations including the unweighted and weighted number of interviews can be accessed [here](#).

This study was commissioned by the Globe and Mail and La Presse, and the research was conducted by Nanos Research.

About the Research

KEY FINDINGS

1

MARK CARNEY HAS ADVANTAGE OVER POILIEVRE AND OTHER LEADERS ON NEGOTIATING WITH PRESIDENT TRUMP
More than three in five Canadians (62%) think Mark Carney would do the best job at negotiating with US President Donald Trump, while one in four believe Pierre Poilievre would do the best job (24%). Bernier, Blanchet and Singh each received one per cent, while fewer than one per cent each think Elizabeth May or Jonathan Pedneault would do the best job. Five per cent believe there is no difference. Residents of the Greater Montreal Area are more likely to think Mark Carney would do the best (72%) than residents of the rest of Quebec (61%).

2

TWO IN THREE CANADIANS ARE CONCERNED ABOUT A POSSIBLE RECESSION; LESS CONCERNED ABOUT PRESIDENT TRUMP'S 51ST STATE THREATS
Two thirds of Canadians (66%) say they are concerned about a possible recession in the next 12 months (score of 7-10; mean of 7.2), while one in four (26%) are neutral (score of 4-6) and seven per cent are not concerned (score of 0-3). In terms of concern about President Trump threatening to make Canada the 51st state of the US, just over one in two (51%) are concerned (mean of 5.8), while three in ten are not concerned (30%) and one in five are neutral (18%). Greater Montreal residents are more likely to be concerned about President Trump's threats (mean of 6.0) than the rest of Quebec (mean of 5.0).

3

MAJORITY ARE ANXIOUS ABOUT THE FUTURE OF CANADA-US RELATIONS
Just under two in three Canadians (63%) say they feel anxious about the future of Canada-US relations (score of 7-10; mean of 6.7), while one in four feel neutral (24%; score of 4-7) and just over one in ten say they do not feel anxious (13%; score of 0-3). Residents of Greater Montreal are more likely to say they are anxious about this (61%) than those in the rest of Quebec (48%).

4

MOST CANADIANS SUPPORT DOLLAR FOR DOLLAR COUNTER TARIFFS ON US GOODS
Just over three in four Canadians would support (52%) or somewhat support Canada imposing dollar for dollar counter tariffs on US goods entering Canada since US President Donald Trump imposed tariffs on Canadian goods, with outright support declining 10 percentage points since February 2025 (62%). Close to one in five would oppose (10%) or somewhat oppose this (eight per cent). Greater Montreal residents are marginally more likely to support or somewhat support this (77%) than residents of the rest of Quebec (69%).

KEY FINDINGS, CONT'D

5

MORE THAN SEVEN IN TEN CANADIANS REPORT THEY HAVE AVOIDED PURCHASING US FOOD PRODUCTS OR OTHER AMERICAN GOODS SINCE DIPLOMATIC TENSIONS BEGAN
In terms of what actions they have taken, if any, since the diplomatic tensions with the US started about a month ago, a majority of Canadians report they have either avoided purchasing American food products (74%) or other American goods (70%) where possible. Other actions included avoided shopping at American chains (34%), cancelling a planned trip to the US (28%) or cancelled subscriptions to American streaming platforms (12%). Close to one in five report they have not taken any action (17%).

6

A SLIM MAJORITY OF CANADIANS FEEL MORE PATRIOTIC ABOUT CANADA COMPARED TO A YEAR AGO
Close to three in five Canadians say they feel more patriotic about Canada compared to a year ago (57%), while one in three feel as patriotic (34%) and less than one in ten feel less patriotic (eight per cent). Ontario residents are more likely to feel more patriotic (61%) than residents of the Prairies (48%).
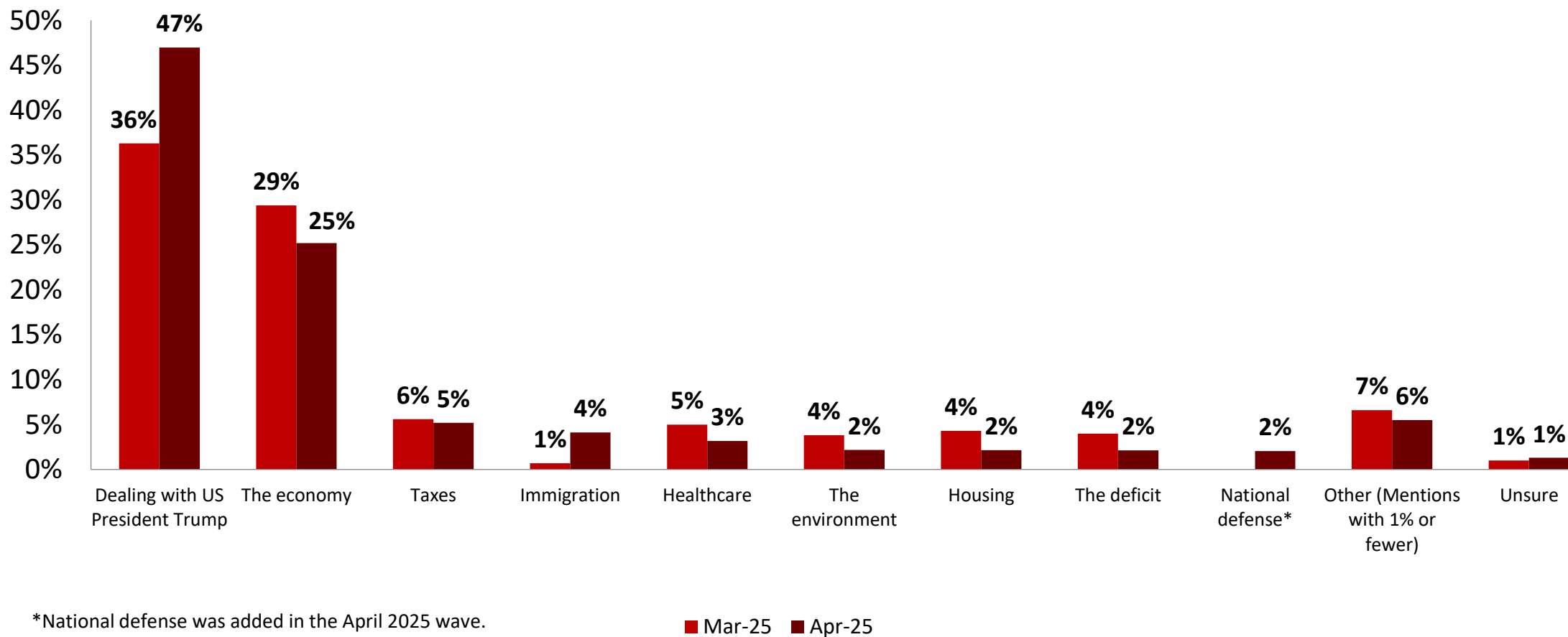
7

DEALING WITH US PRESIDENT TRUMP INCREASINGLY THE TOP ISSUE FOR CANADIANS IN UPCOMING ELECTION
Asked what is the most important issue that will influence how they vote in the upcoming federal election, close to one in two say dealing with US President Trump (47%; up 10 percentage points since February), while one in four say the economy is their top issue (25%). Other issues were taxes (five per cent), immigration (four per cent) and healthcare (three per cent). Greater Montreal residents are marginally more likely to say dealing with President Trump is their top issue for the election (53%) than residents of the rest of Quebec (44%).

Issues influencing vote

Q – What is the most important issue that will influence how you vote in the upcoming federal election? [RANDOMIZE] (Select one)

Issue	Mar-25	Apr-25
Dealing with US President Trump	36%	47%
The economy	29%	25%
Taxes	6%	5%
Immigration	1%	4%
Healthcare	5%	3%
The environment	4%	2%
Housing	4%	2%
The deficit	4%	2%
National defense*		2%
Other (Mentions with 1% or fewer)	7%	6%
Unsure	1%	1%

*National defense was added in the April 2025 wave.

■ Mar-25 ■ Apr-25

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 29th to April 3rd, 2025, n=1223, accurate 2.8 percentage points plus or minus, 19 times out of 20.
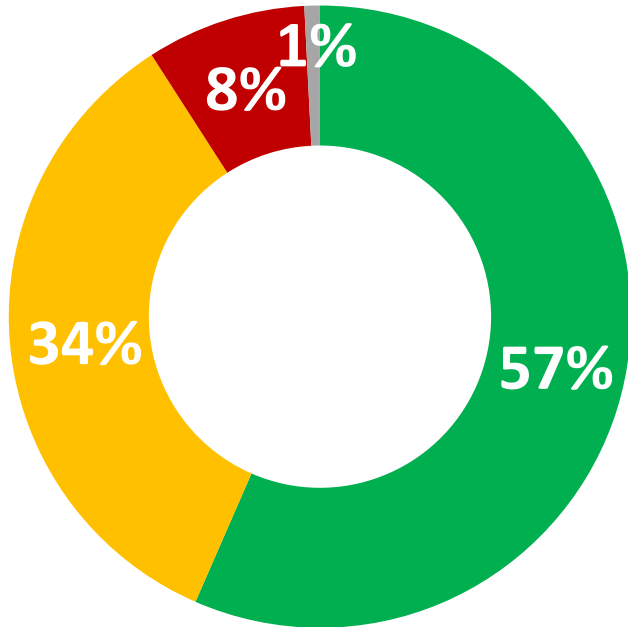
Issues influencing vote – by demographics

Q – What is the most important issue that will influence how you vote in the upcoming federal election? [RANDOMIZE](Select one)

	2025-04 (n=1223)	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)	Men (n=652)	Women (n=570)	18-34 (n=201)	35-54 (n=441)	55 plus (n=581)
Dealing with US President Trump	47.0%	55.1%	52.6%	44.1%	52.1%	33.5%	43.4%	41.9%	51.8%	36.1%	45.3%	55.4%
The economy	25.2%	14.6%	23.4%	19.7%	25.3%	32.9%	26.6%	27.1%	23.4%	26.0%	30.2%	20.8%
Taxes	5.2%	6.2%	1.6%	4.3%	3.9%	10.3%	5.7%	6.8%	3.7%	9.3%	5.4%	2.4%
Immigration	4.1%	2.1%	4.4%	7.4%	3.8%	4.7%	2.4%	5.0%	3.3%	4.8%	5.0%	3.0%
Healthcare	3.2%	7.2%	3.5%	2.7%	3.2%	3.5%	1.0%	2.6%	3.8%	3.9%	3.2%	2.7%
The environment	2.2%	1.1%	2.2%	4.6%	2.8%	0.4%	1.2%	2.2%	2.1%	3.5%	1.0%	2.3%
Housing	2.1%	1.0%	2.5%	1.7%	0.9%	2.2%	6.1%	2.7%	1.6%	4.9%	1.4%	1.0%
The deficit	2.1%	1.4%	2.0%	3.4%	1.2%	2.0%	4.2%	2.4%	1.9%	1.5%	2.0%	2.6%
National defense	2.0%	1.2%	0.8%	2.4%	2.4%	3.2%	0.9%	2.7%	1.4%	1.1%	2.8%	2.1%
Other	4.6%	5.6%	4.7%	7.5%	3.3%	5.3%	4.4%	4.8%	4.4%	3.9%	2.9%	6.4%
Unsure	1.3%	4.5%	2.3%	0.8%	-	1.7%	2.5%	1.0%	1.6%	2.8%	0.6%	0.9%

TOP RESPONSES

THE GLOBE AND MAIL

LA PRESSE

NANOS

Change in feelings of patriotism over the past year

57% More, 34% The same, 8% Less, 1% Unsure

Legend: More | The same | Less | Unsure

More	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)
	62.7%	54.7%	51.1%	60.8%	47.9%	58.7%
	Men (n=652	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)	
	52.7%	60.4%	52.9%	56.8%	58.8%	

Less	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)
	-	6.5%	8.3%	5.7%	18.5%	8.2%
	Men (n=652	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)	
	9.9%	6.8%	13.1%	7.5%	5.8%	

*Weighted to the true population proportion.
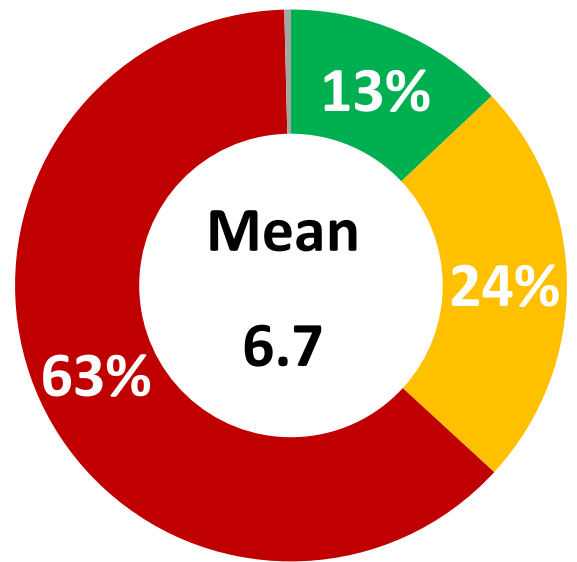*Charts may not add up to 100 due to rounding.

Q – Do you feel more patriotic, less patriotic or as patriotic about Canada compared to a year ago?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 29th to April 3rd, 2025, n=1223, accurate 2.8 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL   LA PRESSE   NANOS

Concerns about the direction of Canada–U.S. relations

Q – On a scale from 0 to 10 where 0 is not at all anxious and 10 is extremely anxious, how anxious are you about the future of Canada-US relations?

Mean 6.7

13%
24%
63%

- ■ Not anxious (0-3)
- ■ Neutral (4-6)
- ■ Anxious (7-10)
- ■ Unsure

Mean	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)
	7.2	6.5	5.9	7.1	6.2	6.7
	Men (n=652)	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)	
	6.4	7.0	6.3	6.6	7.0	

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 29th to April 3rd, 2025, n=1223, accurate 2.8 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL*   LA PRESSE   n NANOS

Concerns related to the economy and Canada-US relations

President Trump threatening to make Canada the 51st state of the United States

| 30% | 18% | 51% |

A possible recession in the next 12 months

| 7% | 26% | 66% |

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Not concerned (0-3)　■ Neutral (4-6)　■ Concerned (7-10)　■ Unsure

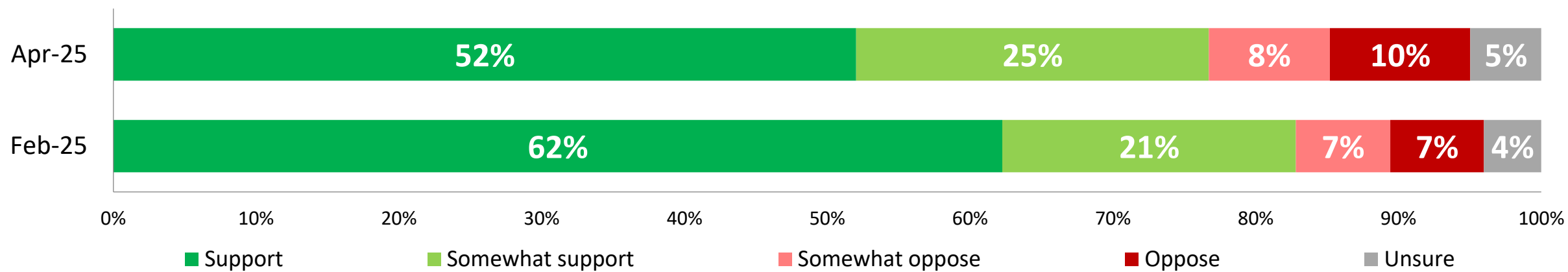| Mean		2025-04 (n=1223)	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)	Men (n=652)	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)
	A possible recession in the next 12 months	7.2	7.2	7.0	7.1	7.5	7.0	7.0	7.1	7.3	7.3	7.2	7.2
	President Trump threatening to make Canada the 51st State of the United States	5.8	6.8	6.0	5.0	6.4	4.4	5.7	5.2	6.3	5.2	5.7	6.2

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Q – On a scale from 0 to 10 where 0 is not at all concerned and 10 is extremely concerned, how concerned are you about the following: [ROTATE]

THE GLOBE AND MAIL　LA PRESSE　NANOS

Support for next steps after President Trump imposed tariffs on Canadian goods

	Apr-25	Feb-25
Support	52%	62%
Somewhat support	25%	21%
Somewhat oppose	8%	7%
Oppose	10%	7%
Unsure	5%	4%

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

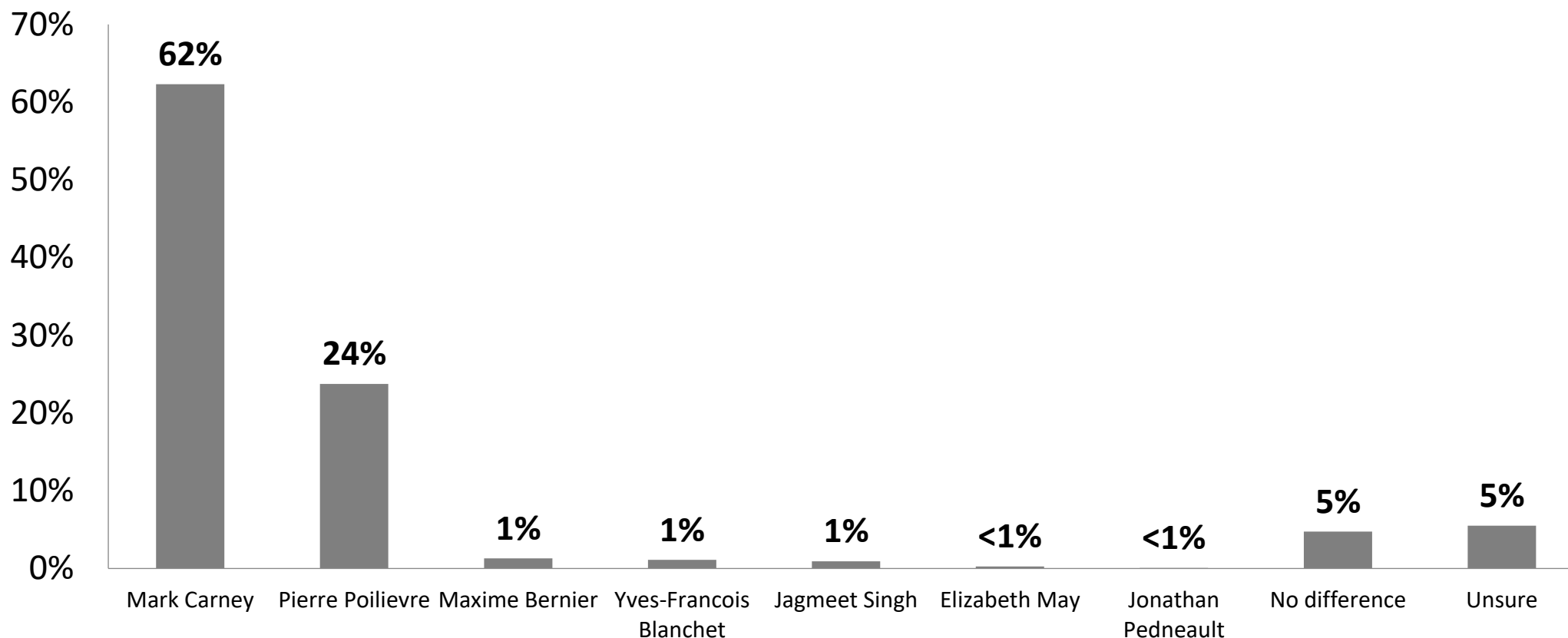|	2025-04 (n=1223)	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)	Men (n=652)	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)
Support/ somewhat support	76.7%	76.7%	76.8%	68.6%	81.8%	71.9%	75.1%	75.3%	78.0%	73.6%	76.1%	79.2%

Q – Do you support, somewhat support, somewhat oppose or oppose Canada imposing dollar for dollar counter tariffs on US goods entering Canada since US President Donald Trump imposed tariffs on Canadian goods? Feb 2025 Q: Would you support, somewhat support, somewhat oppose or oppose Canada doing the following if US President Donald Trump imposes tariffs on Canadian goods: [RANDOMIZE] Impose dollar for dollar counter tariffs on US goods entering Canada

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, March 29th to April 3rd, 2025, n=1223, accurate 2.8 percentage points plus or minus, 19 times out of 20.

THE GLOBE AND MAIL* | LA PRESSE | NANOS

Opinions on which politicians would do the best job negotiating with President Trump

Q – Which of the following politicians would do the best job at negotiating with US President Donald Trump? [RANDOMIZE] [SELECT ONE]

Bar chart:
- Mark Carney: 62%
- Pierre Poilievre: 24%
- Maxime Bernier: 1%
- Yves-Francois Blanchet: 1%
- Jagmeet Singh: 1%
- Elizabeth May: <1%
- Jonathan Pedneault: <1%
- No difference: 5%
- Unsure: 5%

THE GLOBE AND MAIL · LA PRESSE · NANOS

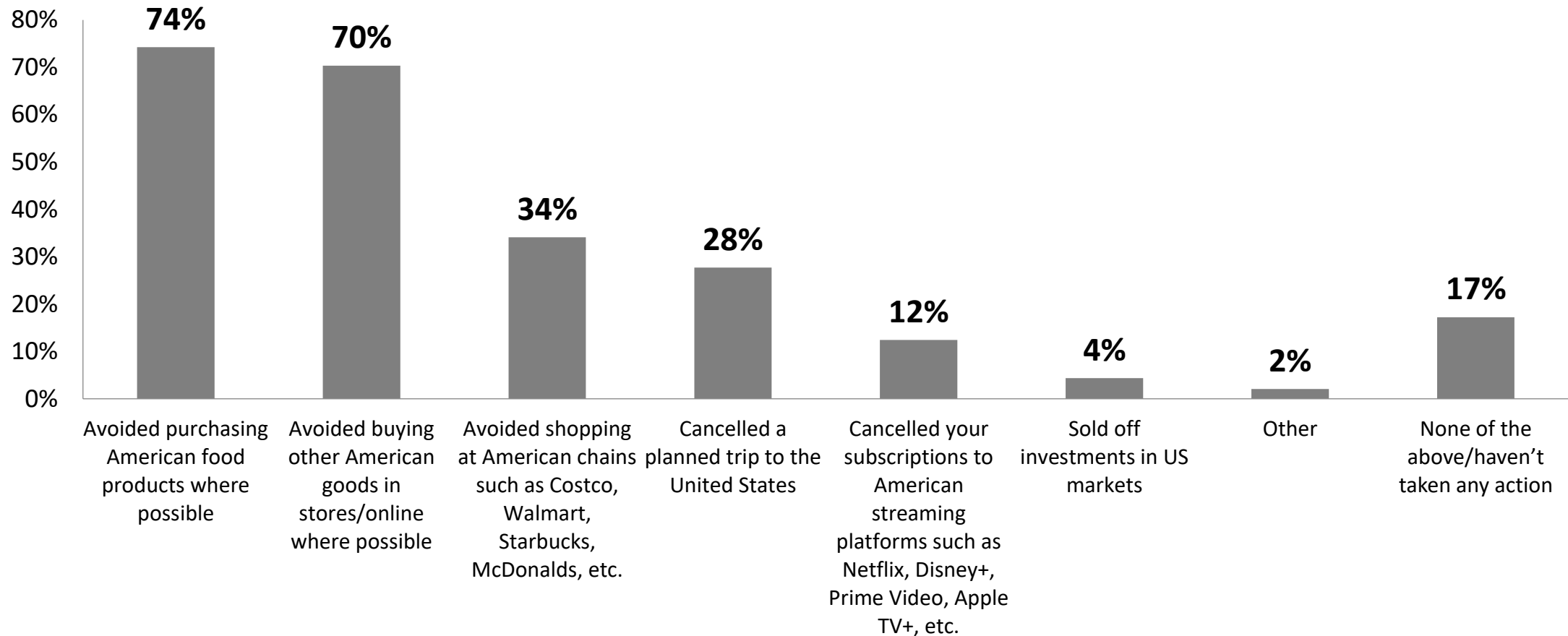# Opinions on which politicians would do the best job negotiating with the President Trump – by demographics

Q – Which of the following politicians would do the best job at negotiating with US President Donald Trump? [RANDOMIZE] [SELECT ONE]

	2025-04 (n=1223)	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)	Men (n=652)	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)
Mark Carney	62.3%	69.2%	71.7%	61.0%	69.0%	40.8%	60.7%	57.2%	67.2%	54.5%	60.4%	68.9%
Pierre Poilievre	23.8%	14.7%	7.2%	16.8%	21.1%	45.9%	27.3%	29.0%	18.8%	28.6%	26.2%	18.7%
Maxime Bernier	1.3%	2.4%	3.3%	1.1%	1.2%	0.5%	0.4%	1.8%	0.8%	2.6%	1.4%	0.4%
Yves-Francois Blanchet	1.1%	-	2.2%	6.6%	0.3%	-	-	1.1%	1.1%	1.0%	1.7%	0.7%
Jagmeet Singh	0.9%	-	0.6%	1.1%	1.4%	-	1.2%	1.1%	0.8%	1.4%	-	1.3%
Elizabeth May	0.3%	-	-	0.4%	-	0.7%	0.5%	0.3%	0.2%	0.5%	0.2%	0.2%
Jonathan Pedneault	0.1%	-	0.6%	-	-	-	-	0.1%	-	0.3%	-	-
No difference	4.8%	3.4%	8.3%	8.7%	3.0%	7.7%	0.4%	5.3%	4.3%	6.3%	3.4%	4.9%
Unsure	5.5%	10.4%	6.1%	4.3%	4.0%	4.3%	9.4%	4.2%	6.8%	4.9%	6.7%	4.9%

THE GLOBE AND MAIL LA PRESSE NANOS

© NANOS RESEARCH

Actions taken since the diplomatic tensions with the US started about a month ago

Q – Since the diplomatic tensions with the US started about a month ago, which of the following actions have you done, if any? [RANDOMIZE][SELECT AS MANY AS APPLY]

Category	Percentage
Avoided purchasing American food products where possible	74%
Avoided buying other American goods in stores/online where possible	70%
Avoided shopping at American chains such as Costco, Walmart, Starbucks, McDonalds, etc.	34%
Cancelled a planned trip to the United States	28%
Cancelled your subscriptions to American streaming platforms such as Netflix, Disney+, Prime Video, Apple TV+, etc.	12%
Sold off investments in US markets	4%
Other	2%
None of the above/haven't taken any action	17%

THE GLOBE AND MAIL | LA PRESSE | NANOS

Actions taken since the diplomatic tensions with the US started about a month ago – by region

Q – Since the diplomatic tensions with the US started about a month ago, which of the following actions have you done, if any? [RANDOMIZE][SELECT AS MANY AS APPLY]

TOP RESPONSES	2025-04 (n=1223)	Atlantic (n=92)	Greater Montreal (n=207)	Rest of Quebec (n=195)	Ontario (n=356)	Prairies (n=213)	BC (n=160)
Avoided purchasing American food products where possible	74.2%	75.6%	77.3%	82.0%	78.3%	61.0%	69.9%
Avoided buying other American goods in stores/online where possible	70.3%	73.8%	77.3%	71.6%	71.5%	59.1%	72.7%
Avoided shopping at American chains such as Costco, Walmart, Starbucks, McDonalds, etc.	34.1%	35.7%	33.4%	32.0%	36.8%	27.9%	35.9%
Cancelled a planned trip to the United States	27.7%	24.1%	26.2%	27.9%	29.8%	20.4%	33.9%
Cancelled your subscriptions to American streaming platforms such as Netflix, Disney+, Prime Video, Apple TV+, etc.	12.4%	14.0%	20.2%	21.6%	8.4%	8.5%	13.7%
Sold off investments in US markets	4.4%	4.1%	4.0%	2.9%	5.1%	3.9%	4.4%
Other	2.1%	-	1.7%	1.2%	2.6%	2.4%	2.3%
None of the above/haven't taken any action	17.2%	13.0%	14.6%	12.0%	14.4%	29.3%	18.6%

© NANOS RESEARCH

THE GLOBE AND MAIL   LA PRESSE   NANOS

Actions taken since the diplomatic tensions with the US started about a month ago – by age and gender

Q – Since the diplomatic tensions with the US started about a month ago, which of the following actions have you done, if any? [RANDOMIZE][SELECT AS MANY AS APPLY]

TOP RESPONSES	2025-04 (n=1223)	Men (n=652)	Women (n=570)	18 to 34 (n=201)	35 to 54 (n=441)	55 plus (n=581)
Avoided purchasing American food products where possible	74.2%	69.1%	79.1%	68.4%	71.6%	80.1%
Avoided buying other American goods in stores/online where possible	70.3%	65.3%	75.1%	64.3%	69.0%	75.3%
Avoided shopping at American chains such as Costco, Walmart, Starbucks, McDonalds, etc.	34.1%	29.3%	38.6%	30.3%	35.2%	35.7%
Cancelled a planned trip to the United States	27.7%	28.5%	27.0%	31.6%	26.6%	26.0%
Cancelled your subscriptions to American streaming platforms such as Netflix, Disney+, Prime Video, Apple TV+, etc.	12.4%	12.9%	11.8%	12.8%	12.9%	11.8%
Sold off investments in US markets	4.4%	4.7%	4.1%	4.9%	4.9%	3.6%
Other	2.1%	1.8%	2.3%	1.5%	2.4%	2.2%
None of the above/haven't taken any action	17.2%	21.2%	13.5%	20.2%	20.2%	12.9%

THE GLOBE AND MAIL*   LA PRESSE   (n) NANOS

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,223 Canadians, 18 years of age or older, between March 29th and April 3rd, 2025, as part of an omnibus survey. An oversample was conducted in Quebec for a total of 402 interviews (n=207 in Greater Montreal; n=195 in rest of Quebec).

Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for this survey is ±2.8 percentage points, 19 times out of 20.

This study was commissioned by the Globe and Mail and La Presse, and the research was conducted by Nanos Research.

Full data tables with weighted and unweighted number of interviews is [here](.).

Note: Charts may not add up to 100 due to rounding

METHODOLOGY

Element	Description
Research sponsor	The Globe and Mail and La Presse
Population and Final Sample Size	1223 Randomly selected individuals.
Source of Sample	Nanos Probability Panel
Type of Sample	Probability
Margin of Error	±2.8 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online
Number of Calls	Maximum of five call backs to those recruited.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	March 29th to April 3rd, 2025.
Language of Survey	The survey was conducted in both English and French.
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.
Stratification	By age and gender using the latest Census information (2021) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample. An oversample was conducted in Quebec for a total of 402 interviews (n=207 in Greater Montreal; n=195 in rest of Quebec).
Estimated Response Rate	Thirteen percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, and views on the upcoming federal election.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Research/Data Collection Supplier	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Tabulations	By region, age and gender

TECHNICAL NOTE

As one of North America's premier market and public opinion research firms, we put strategic intelligence into the hands of decision makers. The majority of our work is for private sector and public facing organizations and ranges from market studies, managing reputation through to leveraging data intelligence.   Nanos Research offers a vertically integrated full service quantitative and qualitative research practice to attain the highest standards and the greatest control over the research process. www.nanos.co

This international joint venture between dimap and Nanos brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion. www.nanosdimap.com

Ethic Strategies was created by the founding partners of PAA Advisory and the Nanos Research Corporation, both recognized leaders in research, advocacy, and advisory. Ethic provides bespoke strategic counsel, advice, and communications strategies to organizations facing serious issues. www.ethicstrategies.com

ABOUT NANOS

Any questions?

✉

Nanos Research

(613) 234-4666, ext. 237

ea@nanosresearch.com

For more information on the firm, please visit www.nanos.co

NANOS

NANOS IS YOUR GO-TO HIGH-STAKES RESEARCH PARTNER.

Delivering world-class solutions since 1987,
we are the leader in high velocity data insights and visualization.

Market | Consumer| Reputation| Policy| Insight

For more information about our services, please visit us at:
www.nanos.co