

Analyzing the 2025 Canadian Federal Election

A data-driven analysis of what happened

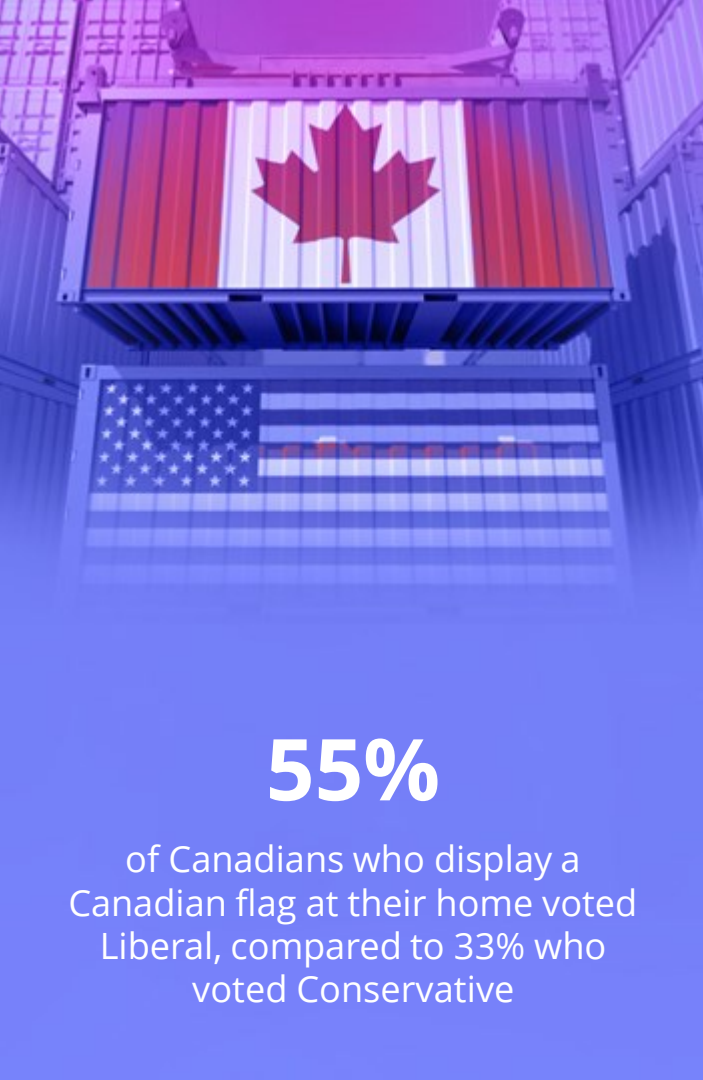


Methodology

- This report analyzes data from several sources, to paint a comprehensive picture of what happened during the 2025 Canadian federal election. Specific sources of data used include:

Election Tracking	Election Results	Post-Election Survey
<ul style="list-style-type: none">• Nightly tracking fielded by PoliSci's sister company Pollara during the 2025 federal election.• In total, n=12,837 interviews collected via online panels, live-interviewer telephone surveys, and IVR.• Data was weighted by gender, age, education, and language within regions.	<ul style="list-style-type: none">• Final validated riding-by-riding vote totals public on the Elections Canada website.	<ul style="list-style-type: none">• A survey fielded by PoliSci's sister company Pollara between May 16th and 20th, 2025.• In total, n=3,400 interviews were collected via online panels.• Quotas were set by gender, age, and language within regions, and results were weighted by self-reported 2025 vote.

- The margin of error will vary slide-to-slide, as much of this analysis looks at sub-populations of various sample sizes.



55%

of Canadians who display a Canadian flag at their home voted Liberal, compared to 33% who voted Conservative

The Ballot Question

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- Trump loomed large over the federal election and was a major factor in Carney's victory. **In a hypothetical scenario where Kamala Harris is president, the Conservatives lead by 5 points.**
 - On leadership attributes, Carney led Poilievre by 18 points on "best to deal with the economic fallout from tariffs" and 18 points on "best to deal with Donald Trump". This advantage was driven both by confidence in Carney and concerns about Poilievre.
- Poilievre was trusted more than Carney on "affordability" and voters were more likely to feel Poilievre understood what they were going through. As a result, voters feeling greater financial pressures moved more to the Conservatives. **Even after controlling for age, the Conservatives performed better among voters with kids and with mortgages.**
 - This partly explains why the Liberal vote stalled in the Toronto suburbs, despite making gains elsewhere in Ontario.



50%

of blue collar workers voted Conservative, compared to 31% who voted Liberal and 7% who voted NDP

Voter Demographics

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- The Conservatives found success among groups of voters more focused on affordability than Trump, **winning men under 50 and blue collar workers in every part of the country.** They won the vote among private sector unions.
- Nationally, the Liberals won among racialized voters by 13 points, and performed better among racialized than non-racialized voters in all of Canada's largest urban centres.
 - That said, their margin over the Conservatives still declined among most ethnocultural groups. Notably, **the Liberal lead among South Asian voters declined from 16 points in 2021 to 4 points in 2025.**
- The Conservatives expanded their lead over the Liberals among Jewish voters and won Hindu voters by 14 points, after tying the Liberals among them in 2021.
- The Liberals pulled over around six-in-ten provincial NDP voters in each of the four western provinces, along with one-third of Ford voters in Ontario, and the majority of CAQ voters in Quebec.

Media Consumption

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A person is shown from the chest up, holding a newspaper. The image is overlaid with a semi-transparent blue filter. The newspaper's masthead at the top reads 'Wap-dap, da-da-di-da-da'. The main headline on the left page starts with a large 'G' and mentions 'Aufmerksamkeit der Erwachsenen'. The right page has a smaller headline about 'Jugendlichen'.

25%

of 18-to-34 year olds heard about the election via Tik-Tok, nearly as many as who heard about it via TV news reports (30%)

- The Liberals performed better among older voters than younger voters in all parts of the country, except Alberta and Saskatchewan. While the “Trump vs. affordability” dynamic was the biggest cause of this, divergent media consumption habits might also have been a factor.
- Indeed, **young voters and old voters experienced the election completely differently:**
 - Among seniors 75% learned about the election via TV news, and 23% still relied on print newspapers. Very few got election news from social media.
 - Meanwhile, voters under 35 were just as likely to get their election news via Tik-Tok (25%) and Instagram (23%), as they were via more mainstream sources like TV news (30%), electronic newspapers (24%), and radio news (15%).
- Racialized voters also tended to lean more heavily on social media for election news (especially Instagram, Tik Tok, and X).



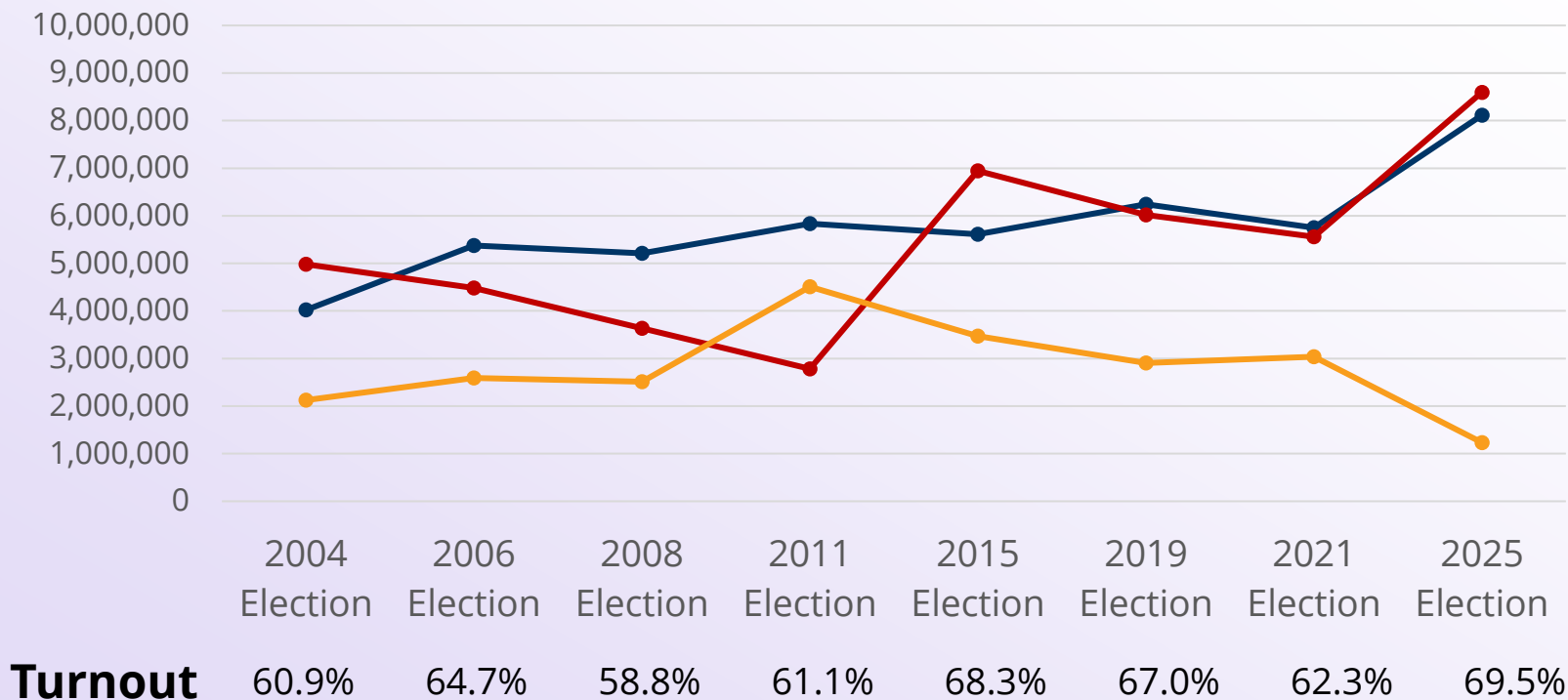
What Happened?

The NDP collapsed everywhere, while the Liberals and Conservatives both rose in all provinces. However, there were localized trends at play – especially in Ontario, where the Conservatives lost support in Ottawa, and the Liberals struggled in the Toronto suburbs (especially York Region).

The Liberals tended to make their biggest gains in areas with the NDP/Greens were previously strong, such as the Victoria region and Urban Saskatchewan.

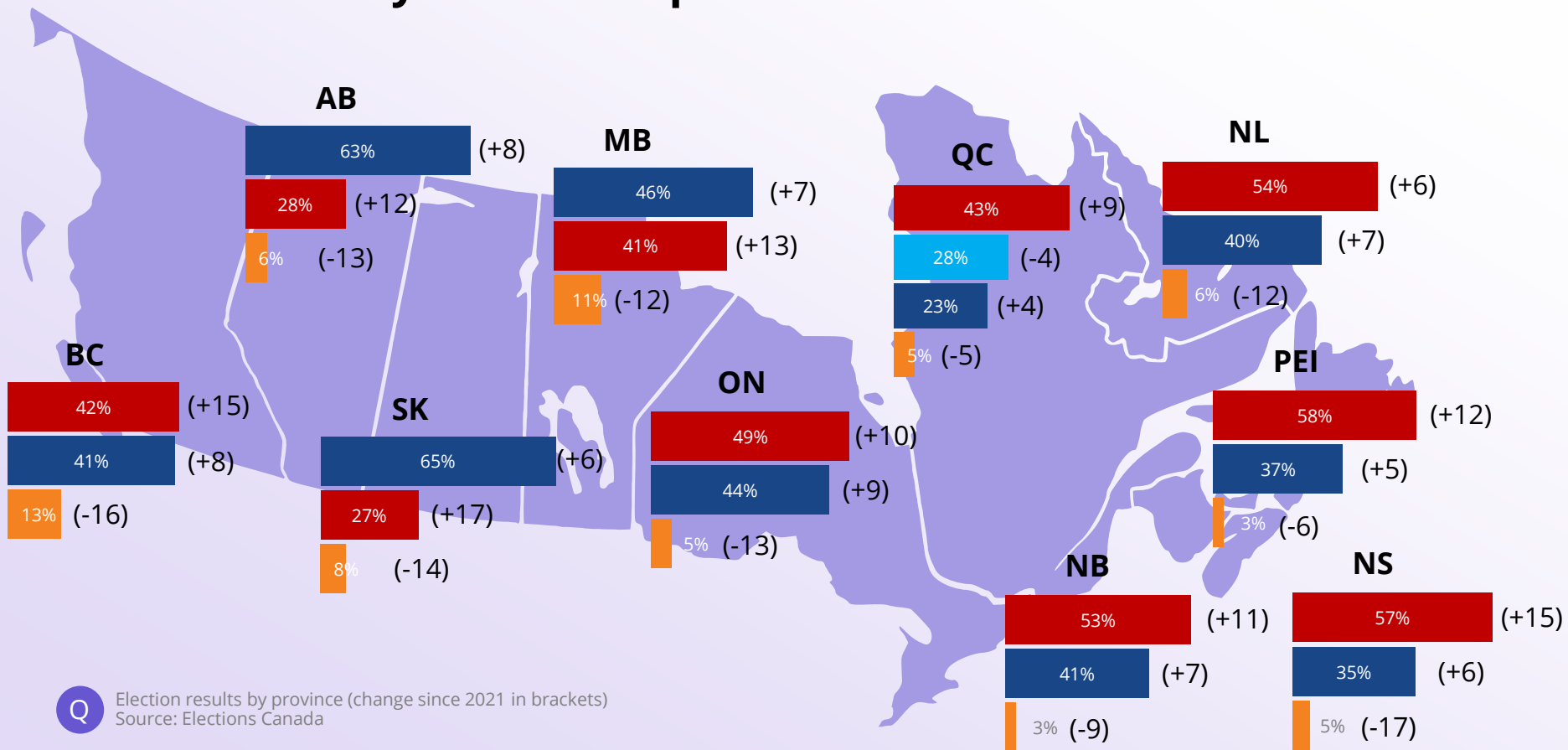
Historical Context: Votes Per Party Each Election Since Conservative Party Merger

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Conservative vote rose in all provinces, but Liberals rose faster than them everywhere except Newfoundland & Labrador

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Liberal vote jumped in most parts of Ontario – but not in the Toronto suburbs

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Change in vote percentage from 2021 to 2025

	Lib Swing	CPC Swing	NDP Swing
Ottawa	+18	-1	-13
Rest of Eastern Ontario	+16	+5	-13
Toronto Core	+12	+9	-15
Toronto Outer (Etobicoke, Scarborough, and north of the 401)	+1	+12	-9
Durham Region	+10	+8	-14
York Region	-4	+14	-6
Peel Region	0	+13	-10
Halton Region	+6	+7	-8
GTA Shadows (Barrie, KW, and nearby areas)	+13	+7	-13
Hamilton-Niagara	+11	+12	-15
Southwest Ontario (Sarnia, London, Oxford and areas south of there)	+15	+11	-16
Northern Ontario	+14	+12	-18

The Conservatives took a big step forward in Ontario, winning 43.8% of the vote, their best showing there since 2011.

However, their results in Ontario were not uniform. They made big gains in York Region and Peel Region, but lost support in Ottawa (with more modest gains elsewhere in Eastern Ontario).

Ridings with Large **Liberal** Vote Swings: Liberal vote jumped in most parts of Ontario – but not in the Toronto suburbs

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Ridings where Liberal vote percentage rose the most	Increase in Lib vote
Saskatoon—University	+31
Regina—Lewvan	+29
Esquimalt—Saanich—Sooke	+28
Victoria	+27
West Vancouver—Sunshine Coast—Sea to Sky Country	+27
Saskatoon South	+26
Vancouver Granville	+25
Similkameen—South Okanagan—West Kootenay	+24
Fredericton—Oromocto	+24
Elgin—St. Thomas—London South	+24

Ridings where Liberal vote percentage fell the most	Decrease in Lib vote
Brampton West	-8
Vaughan-Woodbridge	-8
King-Vaughan	-7
Markham-Thornhill	-6
Mount Royal	-6
Scarborough-Woburn	-6
Etobicoke North	-6
Ponoka-Didsbury*	-5
Thornhill	-5
Surrey Newton	-4



Ridings where Liberal voter percentage rose and fell the most

Source: Elections Canada

NOTES: Liberals did not run a candidate in Ponoka

Ridings with Large **Conservative** Vote Swings: CPC ate into Liberal margins in Surrey, but lost support around Quebec City

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Riding where CPC vote percentage rose the most	Increase in CPC vote
Surrey Newton	+29
Kapuskasing—Timmins—Mushkegowuk	+24
Surrey Centre	+23
Brampton West	+22
Sudbury East—Manitoulin—Nickel Belt	+22
Winnipeg North	+21
Vaughan—Woodbridge	+20
Dartmouth—Cole Harbour	+20
Windsor West	+20
Northwest Territories	+19

Ridings where CPC vote percentage fell the most	Decrease in CPC vote
Québec Centre*	-18
Richmond—Arthabaska	-13
Louis-Saint-Laurent—Akiawenhrahk	-6
Chicoutimi—Le Fjord	-5
Carleton	-5
Louis-Hébert	-4
Acadie—Annapolis	-3
Abbotsford—South Langley	-2
Portneuf—Jacques-Cartier	-2
Fredericton—Oromocto	-2



Ridings where Conservative voter percentage rose and fell the most

Source: Elections Canada

* Conservatives did not run a candidate in Quebec Centre

Unlike Ontario provincial election, NDP incumbents did not hold their vote

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- In comparison, in the Ontario provincial election, NDP support rose 3 points in ridings where an NDP incumbent was running again, despite their vote falling province-wide.

	All ridings	NDP-held ridings with incumbent	NDP-held ridings with no incumbent running
2021	16%	45%	16%
2025	6%	32%	5%
Change	-10	-13	-11



NDP vote by incumbency status
Source: Elections Canada



The background features a group of six diverse individuals walking towards the camera on a city street. The image is overlaid with a blue tint. Above each person is a circular graphic containing a numerical value, likely representing a poll result or sentiment score. From left to right, the values are 5.2, 5.1, 5.2, 9.0, 4.5, and 9.5. The circular graphics have a partial arc at the top, suggesting a progress or gauge-like scale.

What Drove Votes?

“Tariffs” might not have been the top issue on election polls, but confidence in Carney over Poilievre on the “Trump file” was the thing that moved the most votes towards the Liberals.

Meanwhile, the Conservative vote was driven by anti-Liberal sentiment, fuelled by cost of living pressures.

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A word cloud of terms associated with the Liberal Party. The most prominent word is 'Liberal'. Other visible words include 'Slogans', 'Worsened', 'Way', 'Tactics', 'Aligned', 'Values', 'Afraid', 'Temperament', 'Squandering', 'Lies', 'Cynicism', 'Terror', 'Clouded', 'Way', 'Tactics', 'Aligned', 'Values', 'Afraid', 'Temperament', 'Squandering', 'Lies', 'Cynicism', 'Terror', 'Clouded'.

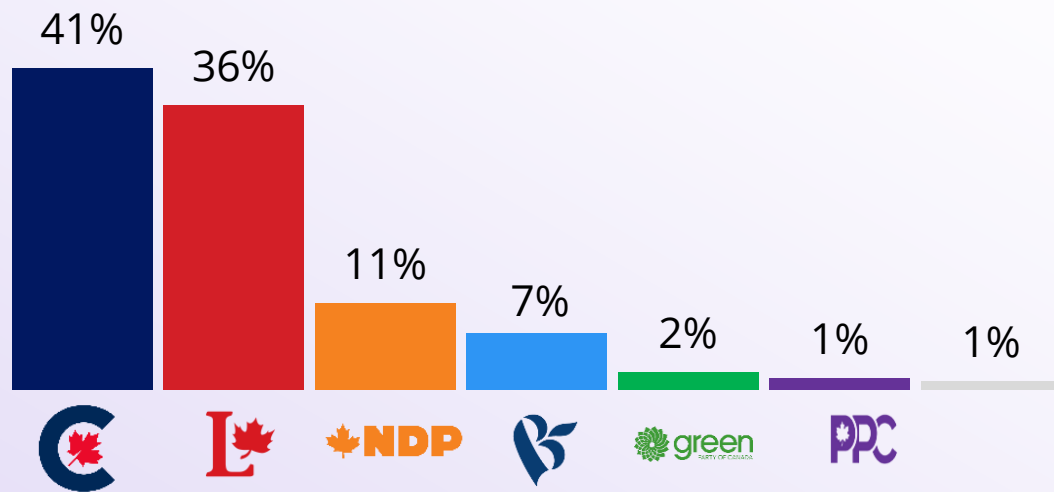


Q Why has your opinion of Mark Carney/Pierre Poilievre improved/worsened lately? [ASKED OPEN ENDED]
Source: Pollara election tracking (among those who say their impression of Carney improved: n=2,108, among those who say their impression of Poilievre worsened: n=2,113)

With Trump removed from the equation, Conservatives win

- In a scenario where Kamala Harris was US President rather than Donald Trump, the Conservatives hold most of their support, but the Liberals bleed support to the NDP.

Vote Intent: If Kamala Harris was President...



Imagine a world where Kamala Harris was President of the United States, rather than Donald Trump. If this was the case, who would you have voted for?
Source: Pollara post-election survey (n=3,400)

Carney more trusted than Poilievre on Trump/tariffs by a wide margin, but neither leader *connected* with voters

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Which of the party leaders do each of the following words best describe?
Source: Pollara election tracking (n=6,619)

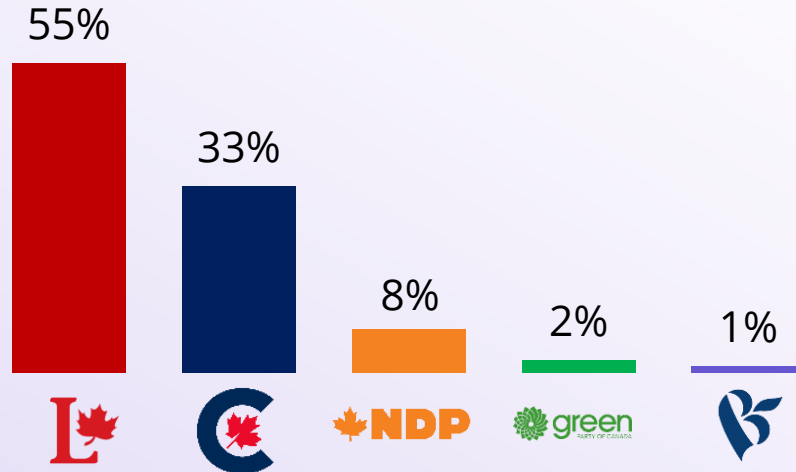


Liberals rode wave of Canadian nationalism

18

- Polling during the campaign showed the Liberals leading by 22 points among voters who have a Canadian flag publicly displayed at their home.

Vote Intent: Among those who have a Canadian flag publicly



If a federal election was today, who would you vote for or lean towards?
Do you have a Canadian flag publicly displayed at your home? (e.g. in a window, on your lawn, hanging from house) | Source: Pollara Election Tracking Mar 28-Apr 3 (Among those who have a Canadian Flag publicly displayed at home: n=151)

The Conservatives performed better among voters feeling financial pressures (such as kids + mortgage)

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- Even when controlling for age effects, the Conservatives performed better among voters with kids under 18 living at home than among those with no kids at home. This holds true when looking at both men and women.
- Similarly, voters still paying down their mortgage were much more likely to vote Conservative than voters of the same age who had paid off their mortgage. The one exception to this was seniors.
- Overall, **the Conservatives led by 9 points among voters with kids who were still paying down their mortgage.**

Age	Kids	No Kids
18-34	CPC +4	Lib +2
35-49	CPC +7	Lib +3
50-64	Tie	Lib +8

Age	Own - with mortgage	Own - mortgage paid	Renting
18-34	CPC +10	Tie	Lib +2
35-49	CPC +7	Lib +4	Tie
50-64	Lib +1	Lib +8	Lib +9
65+	Lib +21	Lib +10	Lib +22



If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=10,973)

NOTE: tracking figures have been adjusted to reflect the final election results



Who Voted for Whom?

The Liberal vote surged among older voters due to Trump. They still won most racialized voter groups, but saw their support decline significantly from last election, notably among South Asian voters. Their vote also fell among Hindu and Jewish voters.

The Conservative vote was very much “boots not suits”, as they won the blue collar vote in every region, but lost among white collar workers. They made big gains from the NDP among private sector unions.

Liberals performed better among older voters than younger voters everywhere except Alberta and Saskatchewan

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- Nationally, the Conservatives won 18-to-34 year old men by 12 points, and 35-to-49 year old men by 20 points.

	Men <50	Men 50+	Women <50	Women 50+
National	CPC +16	Lib +2	Lib +7	Lib +18
British Columbia	CPC +23	CPC +3	LIB +9	LIB +19
Alberta	CPC +37	CPC +42	CPC +28	CPC +32
Saskatchewan	CPC +53	CPC +50	CPC +24	CPC +41
Manitoba	CPC +24	CPC +15	LIB +1	LIB +17
Ontario	CPC +14	LIB +2	LIB +13	LIB +17
Quebec	CPC +3	LIB +28	LIB +14	LIB +38
Atlantic Canada	CPC +5	LIB +18	LIB +19	LIB +43



If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=10,973)

NOTE: tracking figures have been adjusted to reflect the final election results

Conservatives won blue collar vote in all parts of the country

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	Employment type		Racial identity	
	White collar	Blue Collar	White	Racialized
National	LIB +11	CPC +19	Tie	LIB +13
British Columbia	LIB +3	CPC +20	CPC +1	LIB +14
Alberta	CPC +23	CPC +40	CPC +37	CPC +22
Saskatchewan	CPC +32	CPC +59	CPC +41	CPC +14
Manitoba	LIB +14	CPC +54	CPC +7	LIB +5
Ontario	LIB +8	CPC +21	Lib +1	LIB +15
Quebec	LIB +26	CPC +11	LIB +18	LIB +32
Atlantic Canada	LIB +11	CPC +14	LIB +15	LIB +34

If a federal election was today, who would you vote for or lean towards?

Survey respondents self-identified as blue collar or white collar based on the following definitions: "A white collar job – that is, working in an office environment (this would include office jobs being done remotely now)", "A blue collar job – that is, working in a factory, construction, plumber, etc"

Source: Pollara election tracking (Decided voters: n=10,973)

NOTE: tracking figures have been adjusted to reflect the final election results



While Liberal support was not as strong in 2025 as in 2021 among racialized voters, this was still a relative strength

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- Nationally, the Liberals always perform better among racialized voters, in part because these voters tend to live in the large urban centres where the Liberals do well. However, even *within* these large urban centres, the Liberals polled better among racialized than non-racialized voters.
- Among both white and racialized voters, Liberal support was highest among seniors.

Gap in Liberal support between racialized and non-racialized voters

In **Montreal**: Liberal support was **12 points higher** among racialized voters

In **Toronto**: Liberal support was **5 points higher** among racialized voters

In the **905**: Liberal support was **5 points higher** among racialized voters

In **Calgary & Edmonton**: Liberal support was **5 points higher** among racialized voters

In the **Lower Mainland**: Liberal support was **9 points higher** among racialized voters



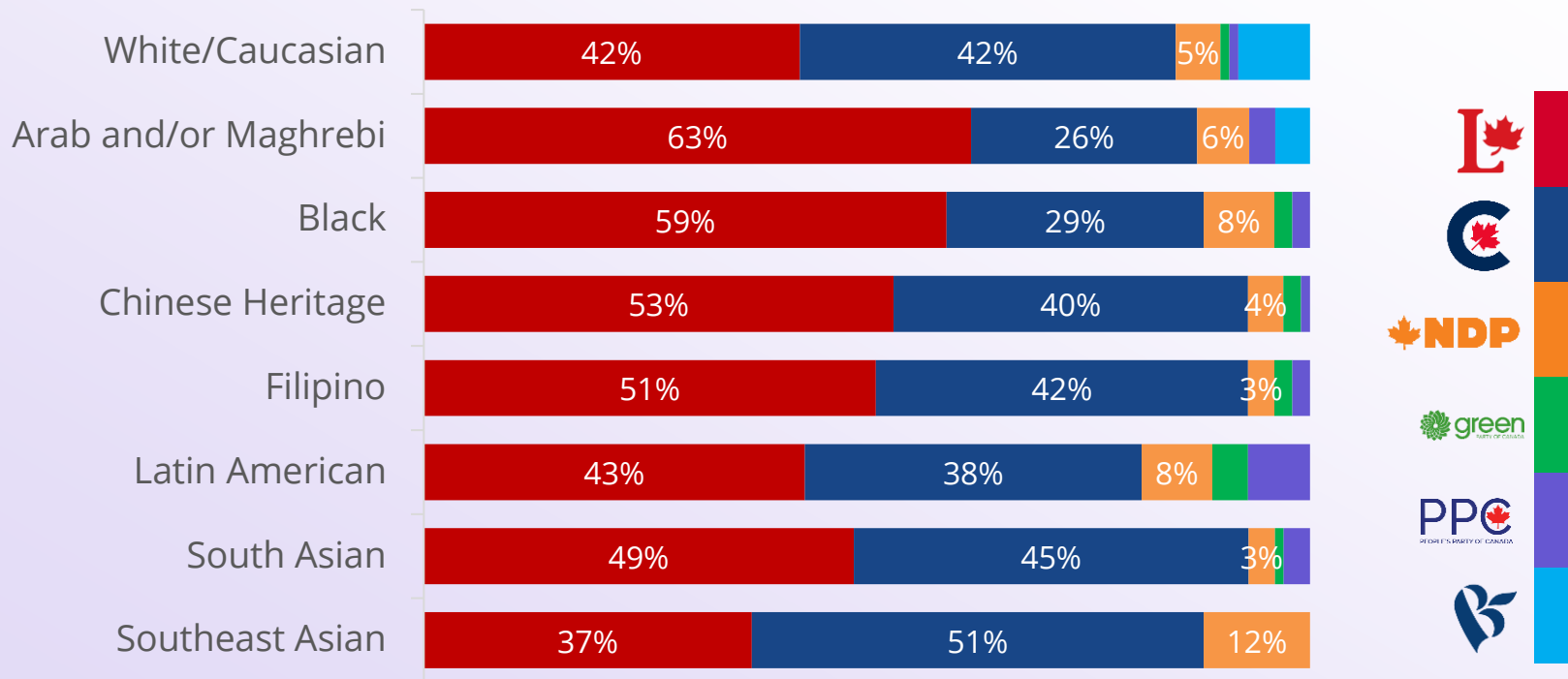
If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (n=12,837)

NOTE: tracking figures have been adjusted to reflect the final election results

Liberals still won among most racialized voter groups...

24



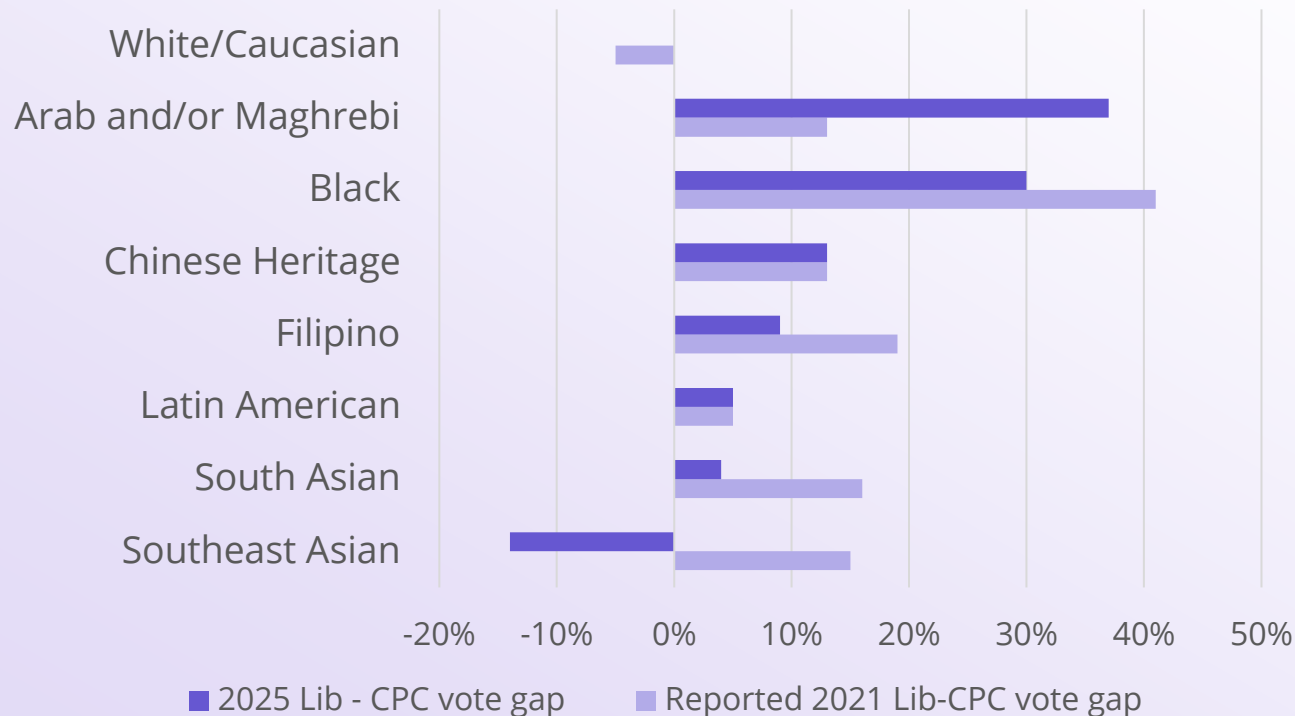
If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=10,973)

NOTE: tracking figures have been adjusted to reflect the final election results

...but by smaller margins than in the last election

25



- Based on self-reported 2021 vote, the Liberals beat the Conservatives by 16 points among **South Asians** in 2021 – but tracking showed them only ahead by 4 points in the 2025 election.
- The only group where there is evidence of the Liberal-Conservative gap widening in the Liberals' favour is with **Arab** voters (and **white** voters).



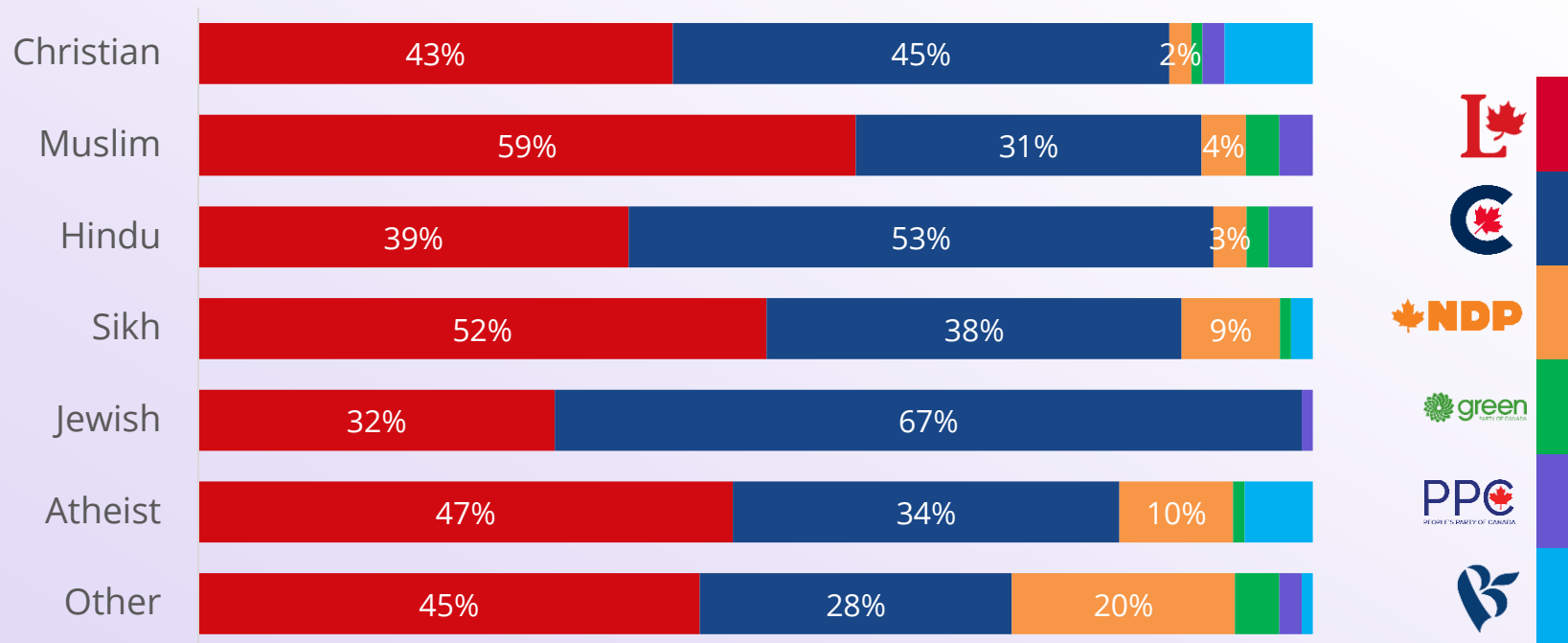
If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=10,973)

NOTE: tracking figures have been adjusted to reflect the final election results (and actual 2021 vote)

Liberals won Muslim, Sikh, and Atheist voters by large margin, with Conservatives winning among Jewish and Hindu voters

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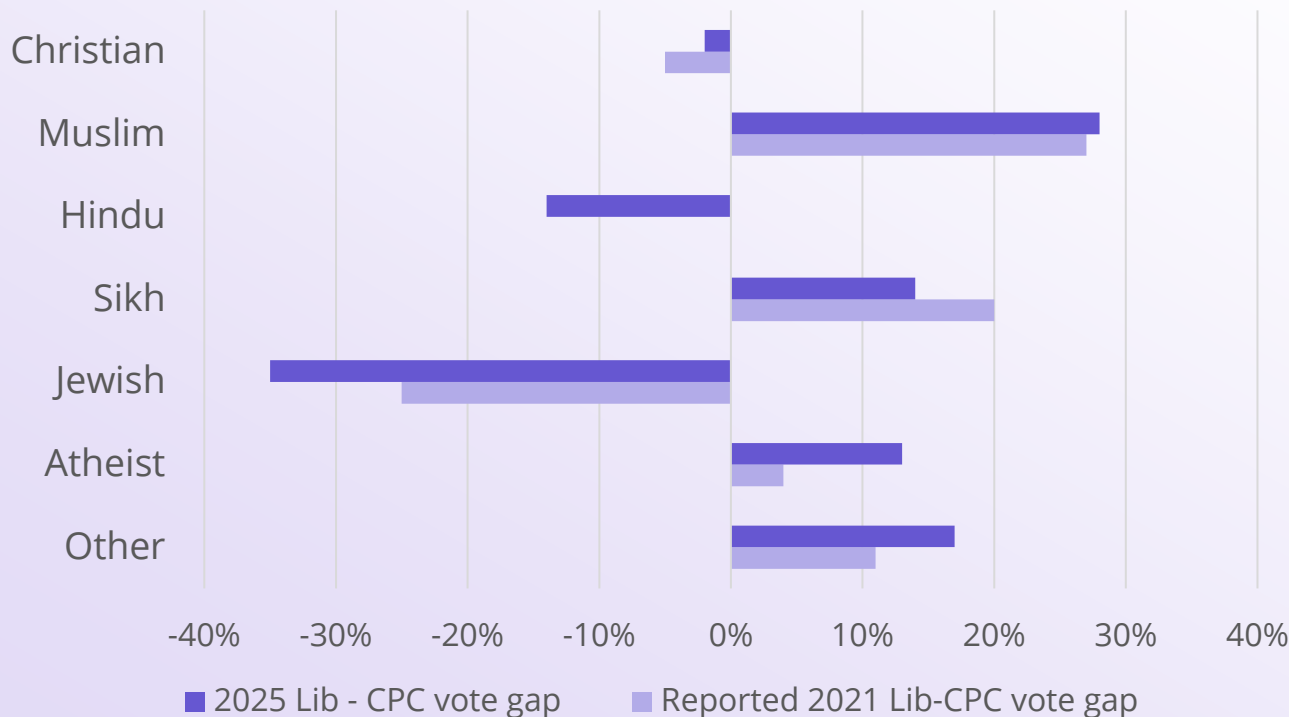
If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=5,448)

NOTE: tracking figures have been adjusted to reflect the final election results

Conservatives improved their support significantly among Jewish and Hindu voters

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- The Liberals and Conservatives tied among **Hindu** voters in 2021 (based on self-reported vote), but the Conservatives won by 14 points in 2025.
- The Conservative lead among **Jewish** voters widened from 25 points in 2021 to 35 points in 2025.
- The Liberals held a large advantage among **Muslim** voters in both the 2021 (+27) and 2025 (+28) elections.



If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=5,448)

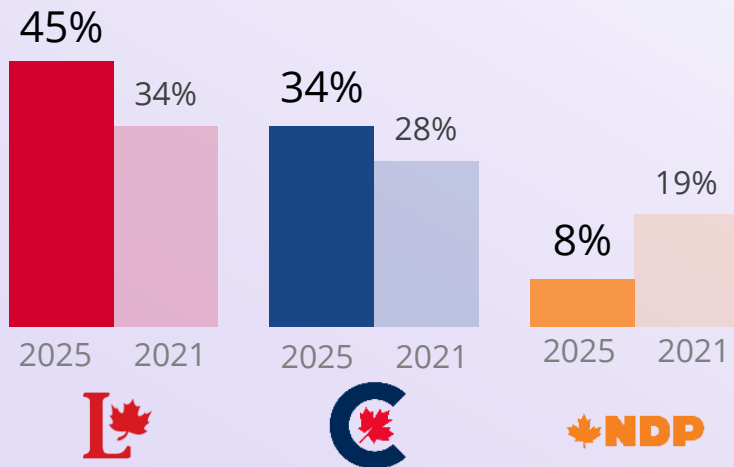
NOTE: tracking figures have been adjusted to reflect the final election results (and actual 2021 vote)

The NDP's union vote crumbled, with the Conservatives gaining more among private sector unions and Liberals gaining more among public sector unions

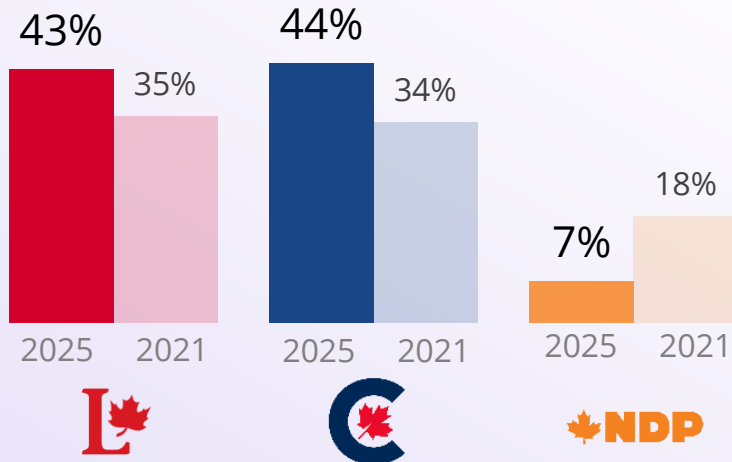
28

- The Liberal vote rose 11 points among public sector unions and 8 points among private sector unions between 2021 and 2025.
- The Conservative vote rose 10 points among private sector unions and 6 points among public sector unions.

Public Sector Unions



Private Sector Unions



If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (Decided voters: n=5,448)

NOTE: tracking figures have been adjusted to reflect the final election results (and actual 2021 vote)



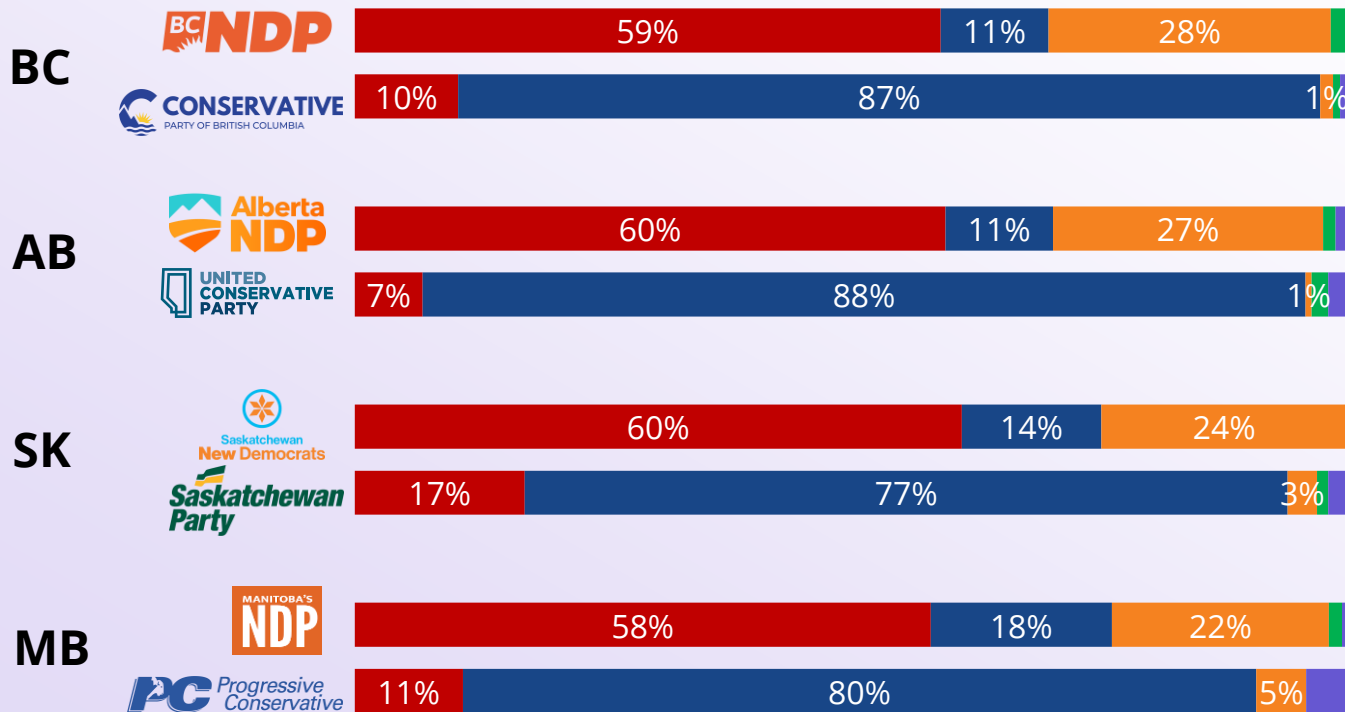
What role did provincial political dynamics play?

Carney won the majority of provincial NDP voters across the four western provinces and the majority of CAQ voters in Quebec.

While Poilievre generally converted provincial conservatives, Ontario stands out as a notable exception, as one-third of Ford voters voted Carney.

Federal vote by provincial vote in the west

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- The federal Liberals consistently took 58%-to-60% of the provincial NDP vote in BC, Alberta, Saskatchewan, and Manitoba.
- Meanwhile, the federal Conservatives won 77%-to-88% to the vote from the provincial conservative party across the west.



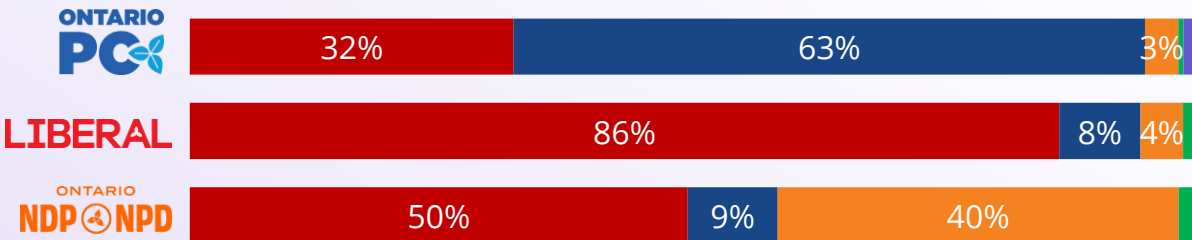
If a federal election was today, who would you vote for or lean towards?

Source: Pollara election tracking (BC: n=1,907, Alberta: n=1,717, Saskatchewan: n=756, Manitoba n=908)

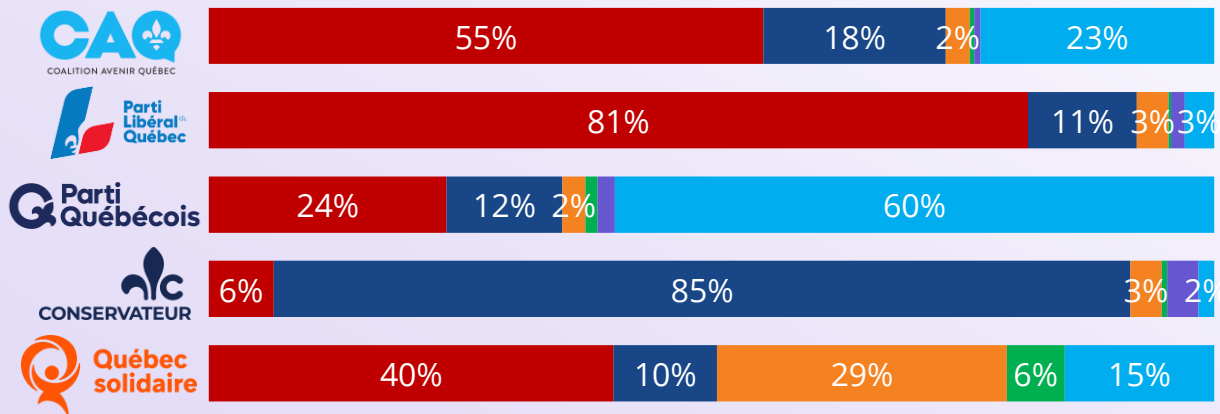
Federal vote by provincial vote in Central Canada

31

ON



QC



- The federal Liberals took one-third (32%) of Doug Ford's vote in Ontario, significantly higher than the share of the 6%-to-17% of the provincial conservative vote they got in the other 5 provinces polled.



If a federal election was today, who would you vote for or lean towards?
Source: Pollara election tracking (Ontario: n=3,314, Quebec: n=2,582)



Where did people get their news?

Younger and older voters experienced two completely different elections. Older voters were more engaged, relying on traditional media (especially TV) for election news, while young people relied more on social media.

Voters of all stripes got their election news from the same *types* of media during election

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Sources of election news

		2025 VOTE			
		LPC	CPC	NDP	BQ
Television news reports	52%	59%	51%	56%	59%
Newspapers (electronic)	28%	33%	26%	28%	36%
Online news sites	27%	29%	29%	26%	15%
Conversations with family, friends	24%	26%	25%	26%	23%
Radio news reports	20%	22%	22%	21%	23%
Facebook	17%	16%	20%	14%	14%
Mobile news apps	16%	16%	19%	15%	11%
Newspapers (print)	14%	16%	13%	16%	16%
Instagram	11%	12%	12%	8%	6%
Tik-Tok	10%	9%	10%	11%	10%
Advertising	10%	10%	10%	7%	12%
Candidates' websites	10%	11%	12%	10%	4%
Email newsletters	10%	10%	10%	8%	11%
Podcasts	9%	10%	13%	9%	4%
X (formerly Twitter)	9%	8%	15%	5%	3%
Pamphlets dropped by candidates	9%	11%	9%	7%	8%
Substacks	3%	3%	3%	3%	1%

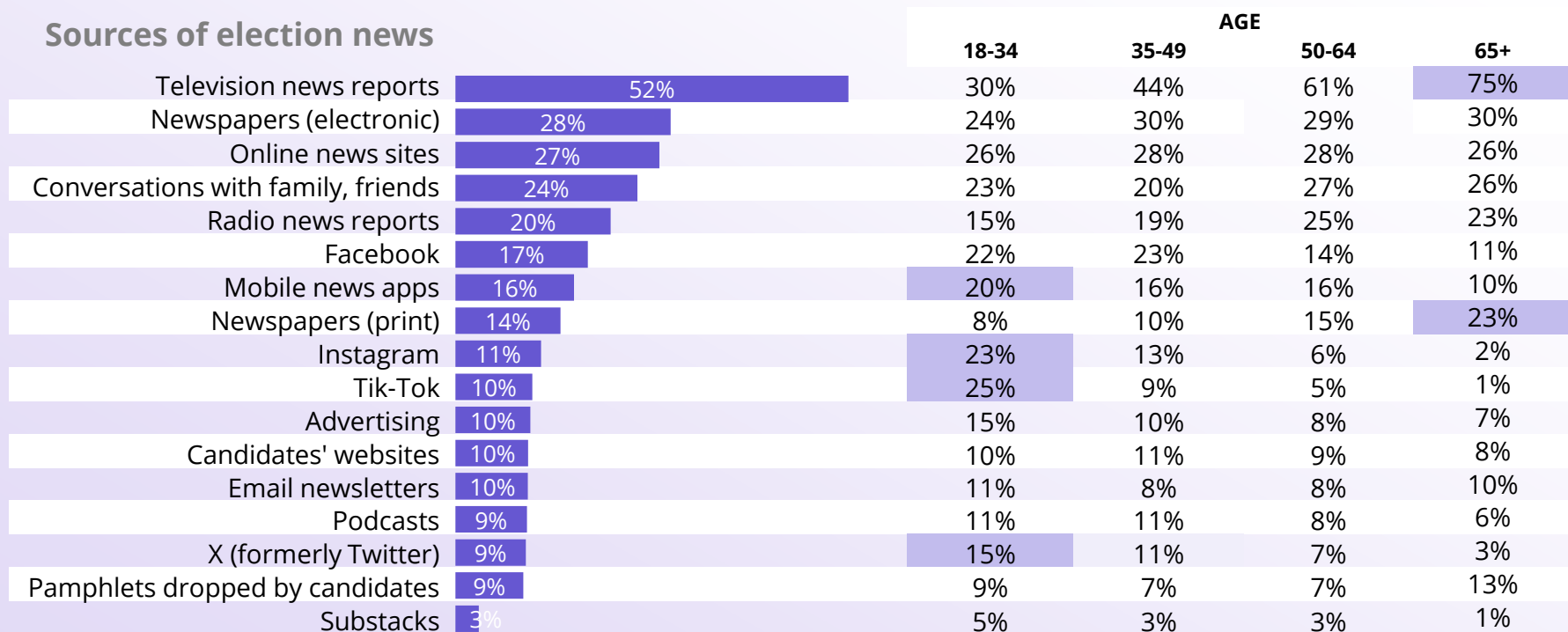


During the recent Federal Election, what were your main sources for news about the election? Select all that apply.

Source: Pollara post-election survey (n=3,400)

Older voters relied on traditional media for election news, while younger voters found more out online

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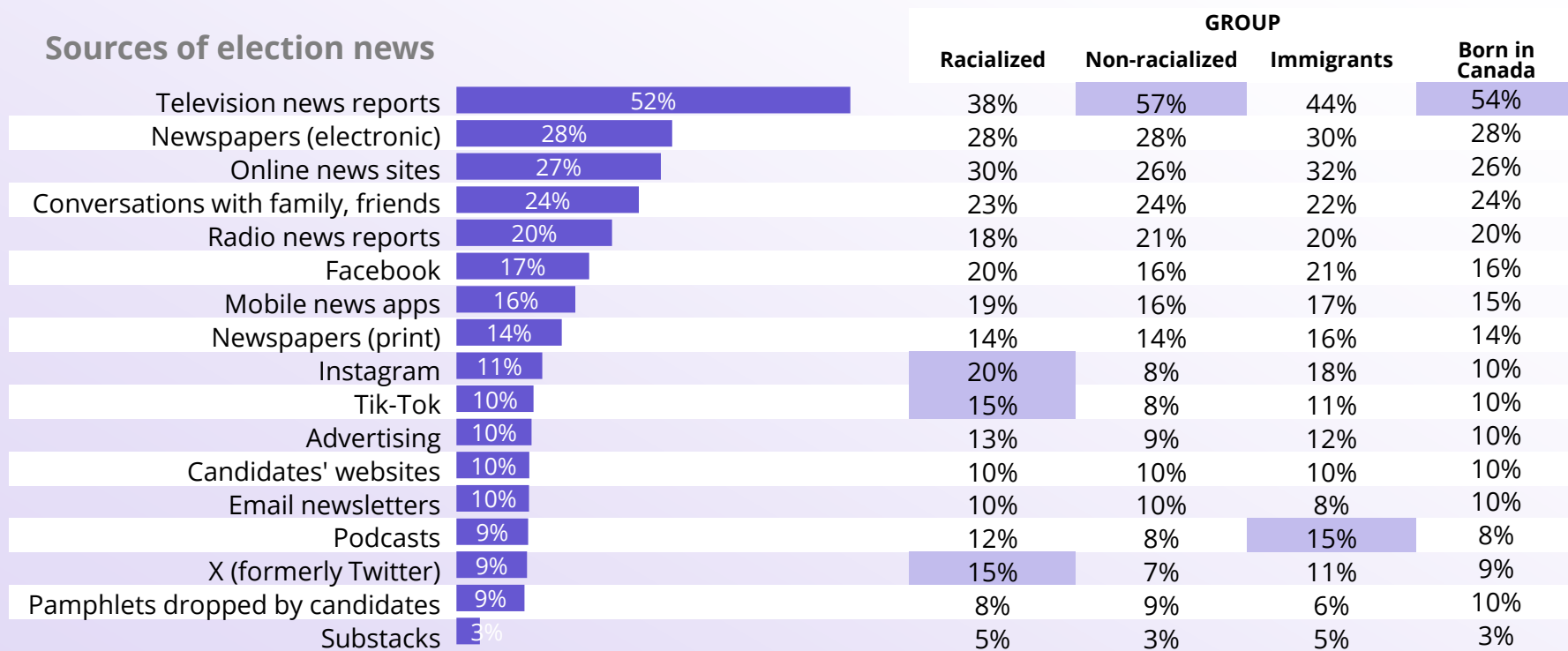


During the recent Federal Election, what were your main sources for news about the election? Select all that apply.

Source: Pollara post-election survey (n=3,400)

Racialized voters relied more on social media for their election news

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During the recent Federal Election, what were your main sources for news about the election? Select all that apply.

Source: Pollara post-election survey (n=3,400)

Analyzing the 2025 Canadian Federal Election

For questions, contact:
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