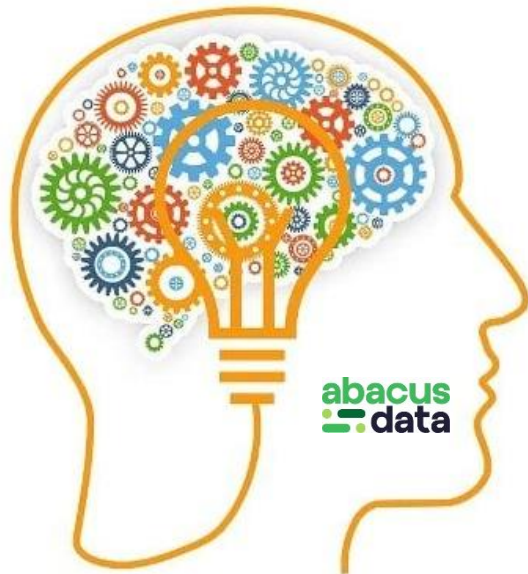




Policy and politics: What's next for Canadian businesses?

■■■
The better the question. The better the answer.
The better the world works.

CANADA'S MOST SOUGHT AFTER AND INFLUENTIAL VOICE IN EXPLAINING PUBLIC OPINION, POLITICAL BEHAVIOUR, AND OUR SOCIETY IN CANADA.



Founded in 2010

16 Research Professionals

Official pollster for the
Toronto Star

Located in Ottawa, Toronto, Halifax
London, Hamilton and Edmonton

SOME OF THE BRANDS AND ORGANIZATIONS WHO TRUST US

ASSOCIATION
MÉDICALE
CANADIENNE



CANADIAN
MEDICAL
ASSOCIATION

Google

sysco
At the heart of
food and service

airbnb

FOOD, HEALTH &
CONSUMER PRODUCTS
OF CANADA

FHCP

Government
of Canada

Canada

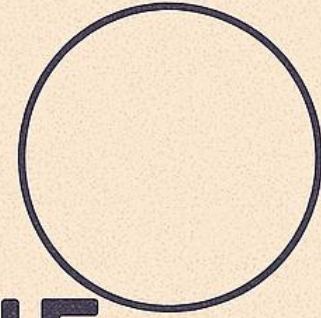
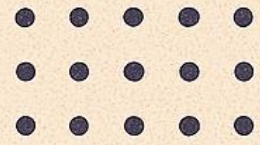


**Loblaw
Companies
Limited**

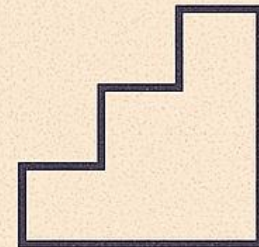
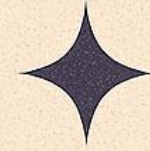
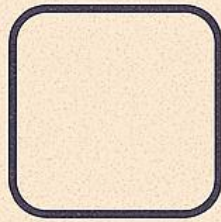


Public Service Alliance of Canada
Alliance de la Fonction publique du Canada





**IDENTIFYING THE
UNMET NEEDS
OF CONSUMERS
IS WHAT WE DO
BEST.**









**A SCARCITY
MINDSET**



**RAPID POPULATION
GROWTH**



**AN AGING
POPULATION**



**A HOUSING
AFFORDABILITY
CRISIS**

WHAT DOES A SCARCITY MINDSET LOOK LIKE?

מחירי שירותי **מחירי שירותי**





79%

SAY **DONALD TRUMP**
IS CREATING STRESS
ABOUT THE FUTURE OF CANADA

SCARCITY → PRECARITY



**A PRECARIETY
MINDSET**

WHAT DOES A PRECARITY MINDSET LOOK LIKE?

● ●

● ●



68%

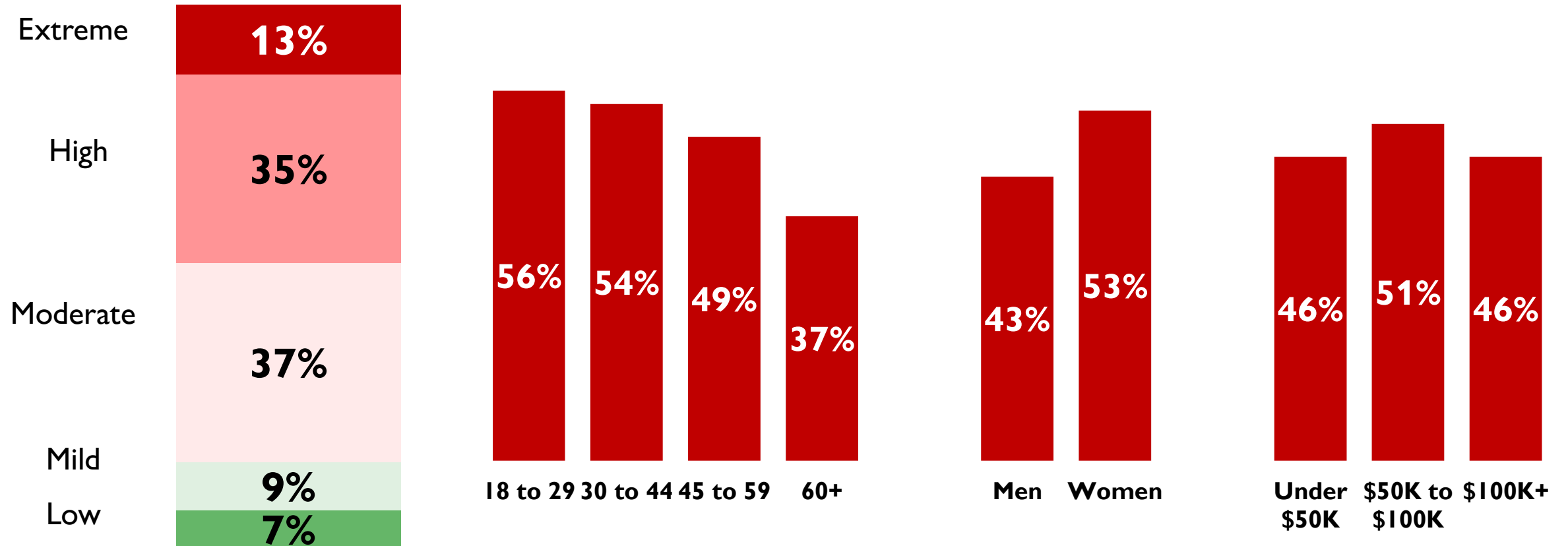
Worried about their ability to **afford basic needs** over next 6 months.

70%

Likely to **delay major life decisions** due to financial uncertainty



Precarity Index by Demographics



Scarcity is about *short-term survival*.

Precarity is about *long-term uncertainty*

Scarcity is about *fear of losing access to the basics.*

Precarity is about *fear that foundational systems might collapse in the future.*

Scarcity is about *not having enough*.

Precarity is about *not knowing whether anything will hold*.

Are we ready to respond to the change that's coming?
How do we create more certainty for people?



A Canadian flag is shown waving on a flagpole against a cloudy sky. The flag features a red field with a white square in the center, containing a red maple leaf. The flagpole is white and has a gold finial at the top.

**How did the shift in
mindset impact the
election?**

**SCARCITY CREATED A DEEP
DESIRE FOR POLITICAL CHANGE.**

**INCUMBENT
GOVERNMENTS WERE IN
TROUBLE EVERYWHERE**



FAIRNESS FOR EVERY GENERATION

**UNE CHANCE ÉQUITABLE POUR
CHAQUE GÉNÉRATION**



PRIME MINISTER
PREMIER MINISTRE

12%

**Believe the Liberals
deserve to be re-elected.**

CURRENT FEDERAL VOTE INTENTION

THE WEEK JUSTIN TRUDEAU ANNOUNCED HIS RESIGNATION

NATIONAL

CONSERVATIVE

47%

LIBERAL

20%

NDP

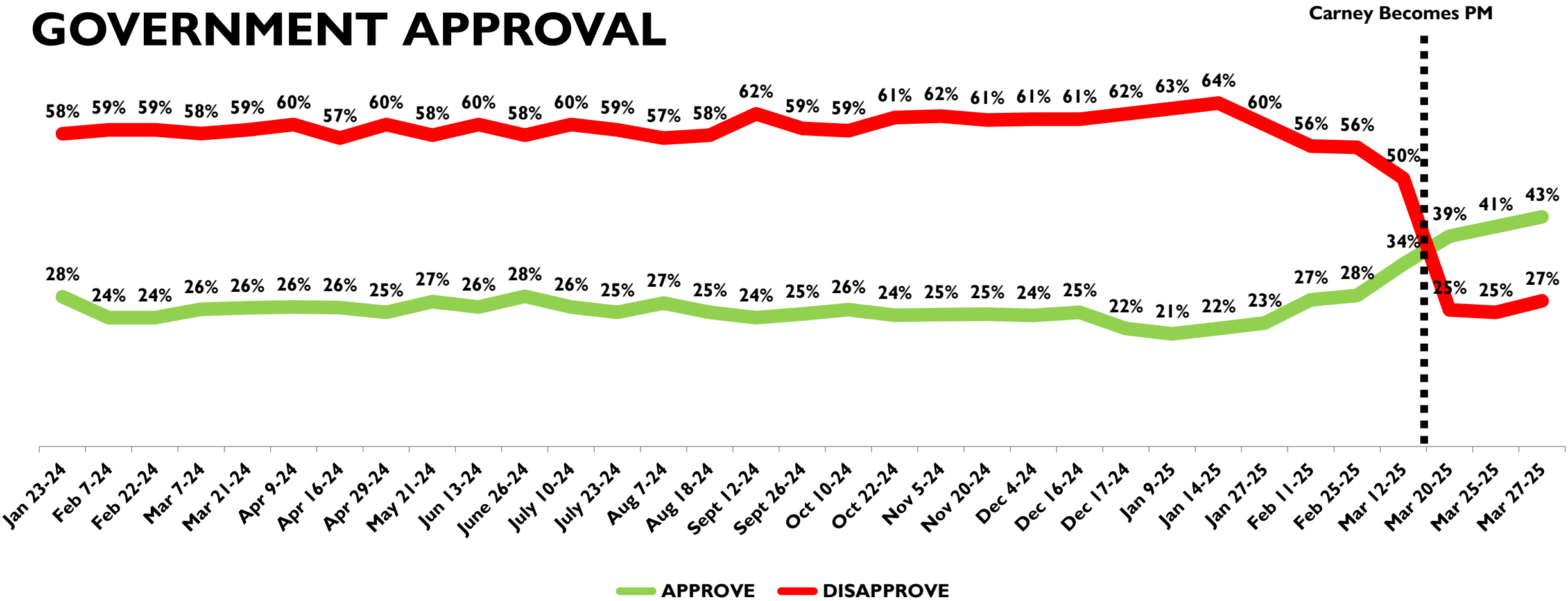
17%



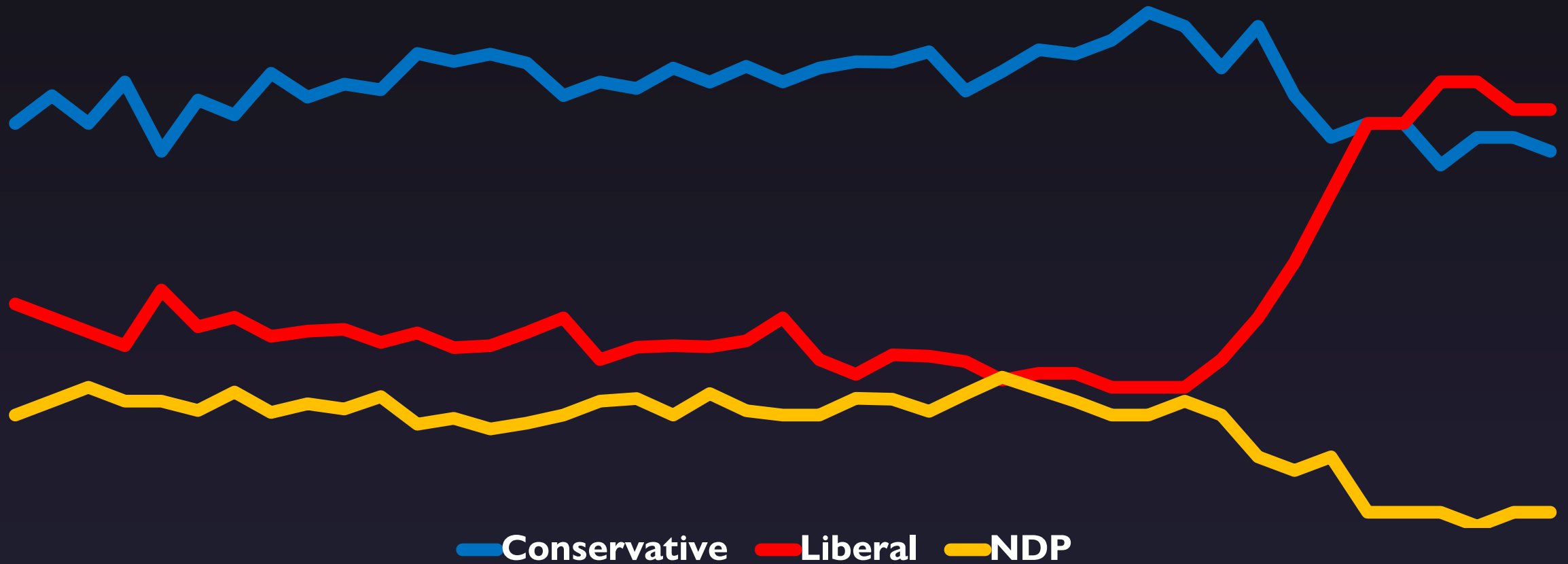


OVERALL, DO YOU APPROVE OR DISAPPROVE OF THE JOB THE FEDERAL GOVERNMENT LED BY MARK CARNEY IS DOING?

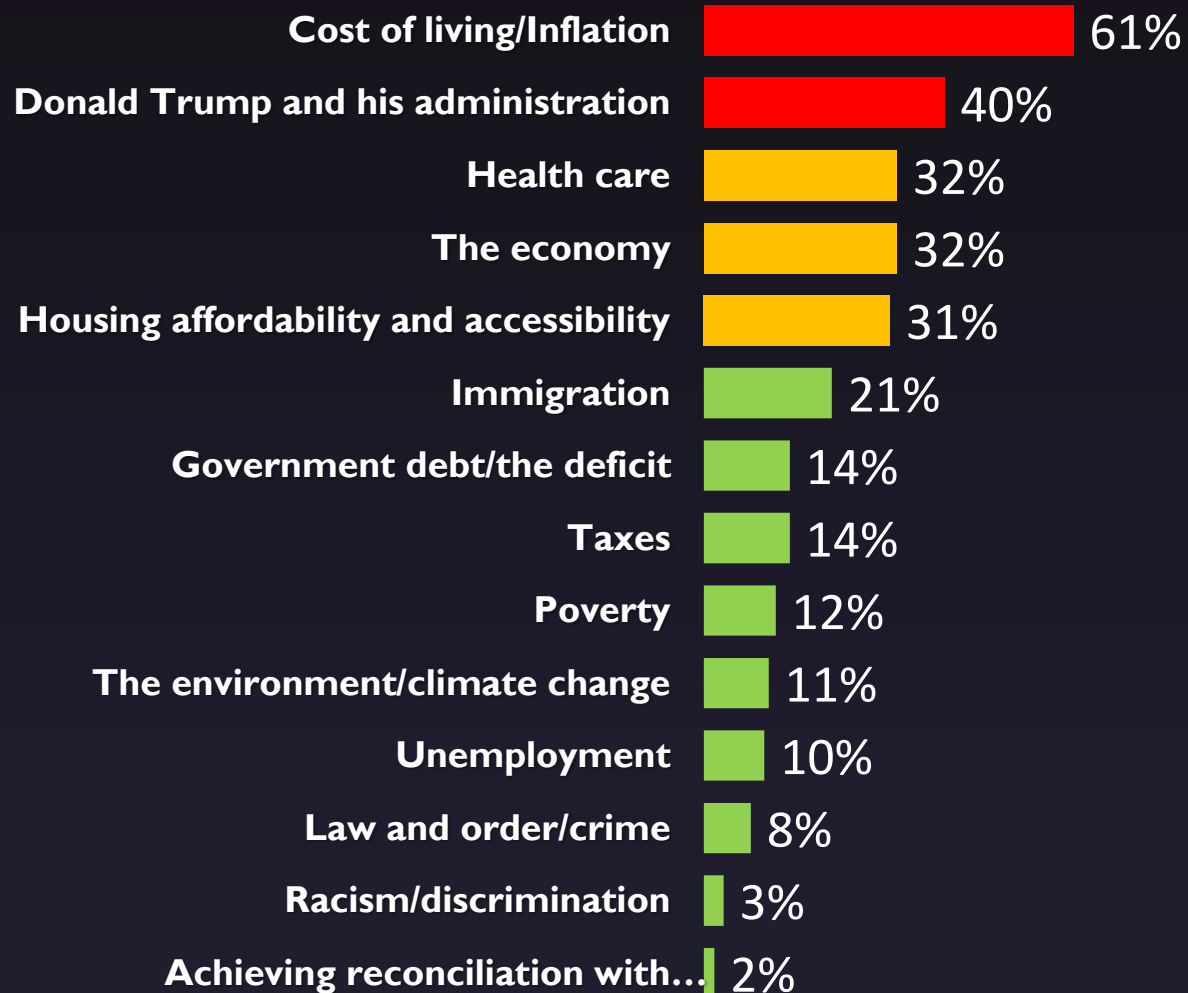
GOVERNMENT APPROVAL



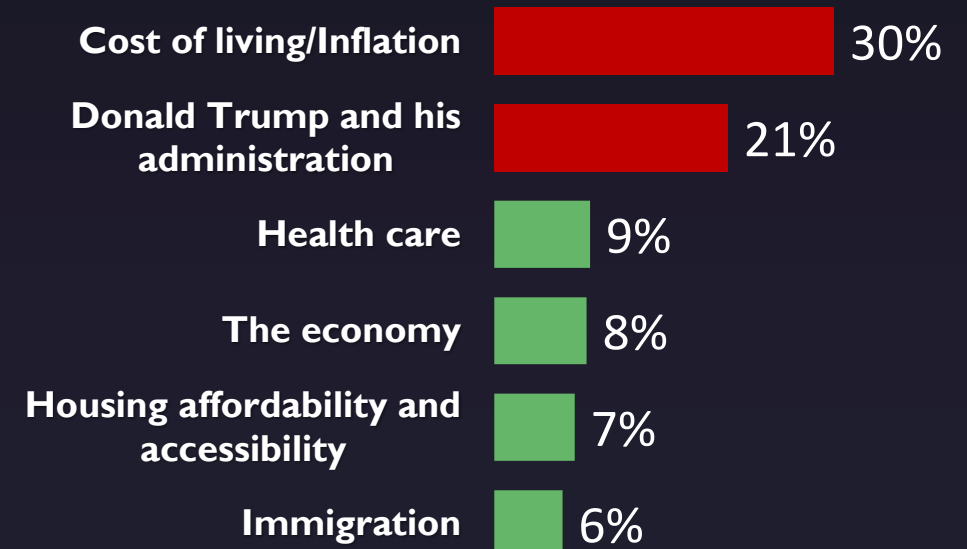
CURRENT FEDERAL VOTE INTENTION



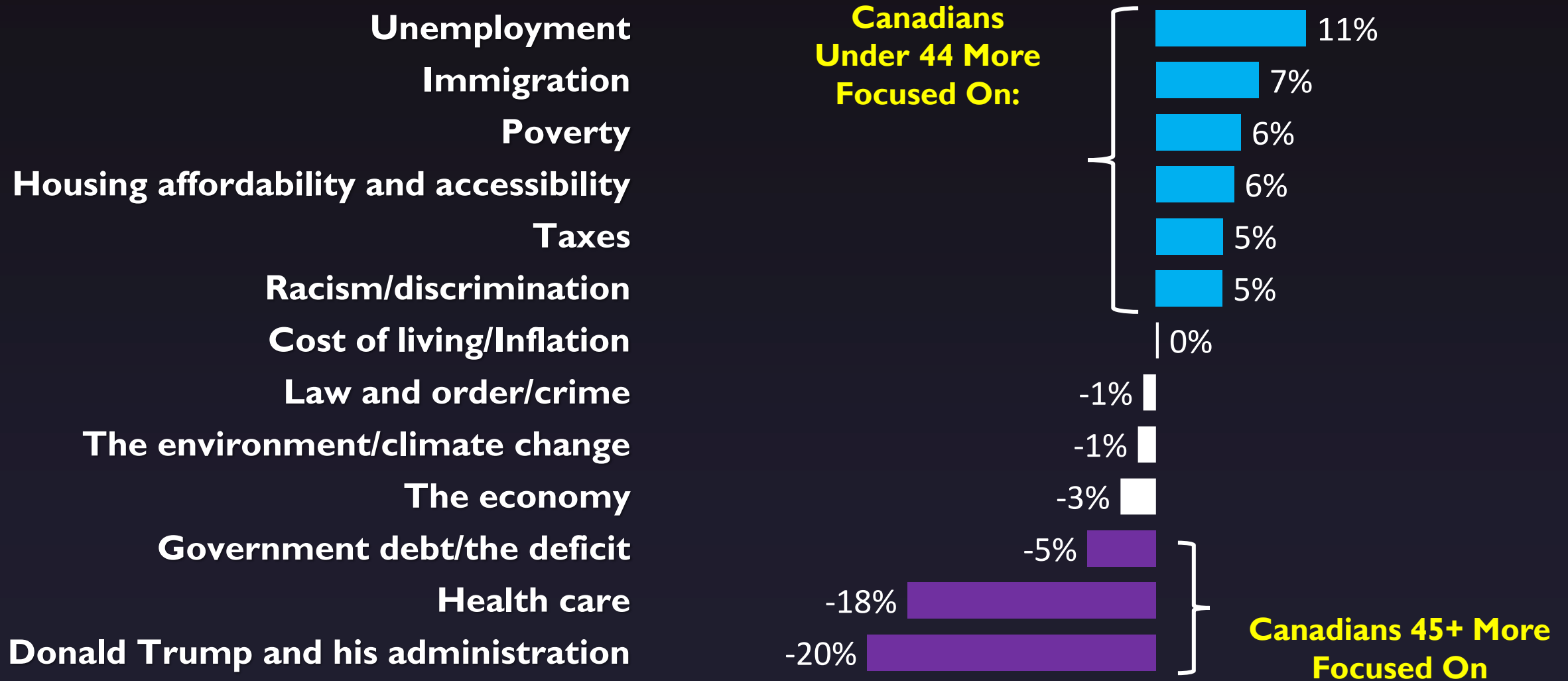
THE TOP ISSUES



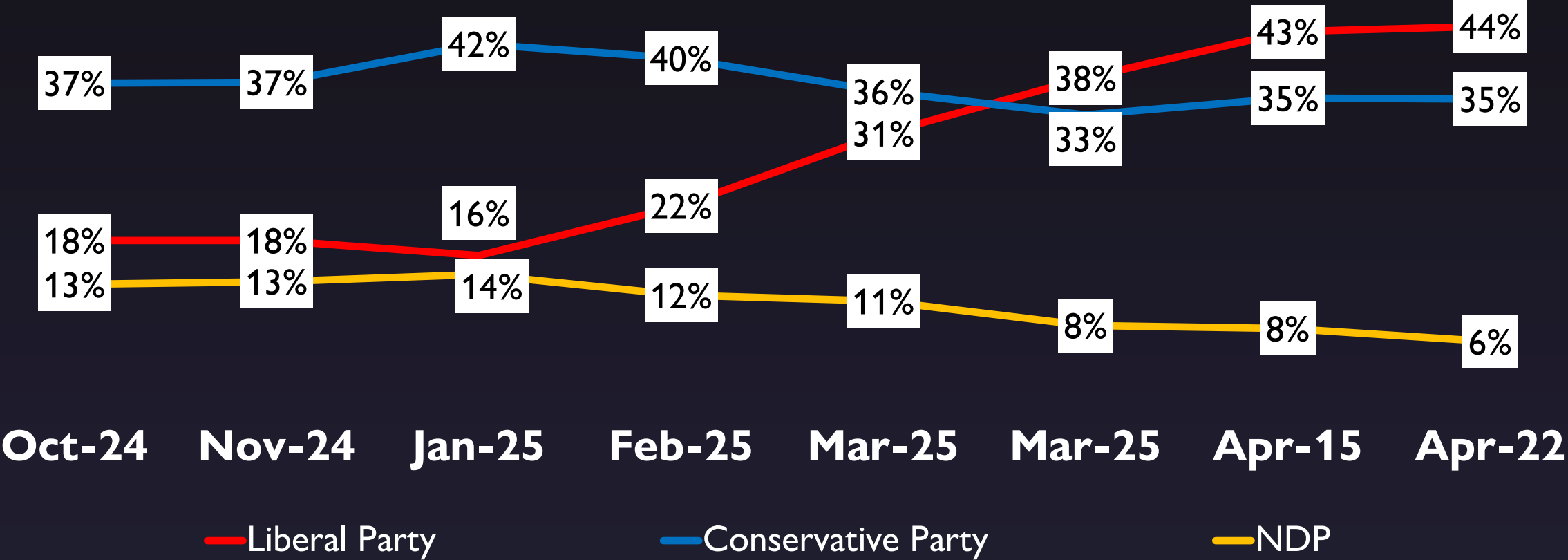
THE TOP ISSUE



THE TOP ISSUES – Younger vs. Older



PARTY MOST TRUSTED ON THE ECONOMY



PARTY BEST ABLE TO HANDLE...

	Liberals	Conservatives
Make the CDN economy more competitive	44% <input checked="" type="checkbox"/>	35%
Protect Canada's interests against Trump	46% <input checked="" type="checkbox"/>	34%
Develop infrastructure that promotes growth	40% <input checked="" type="checkbox"/>	36%
Manage federal deficit/debt	38%	38%
Keep taxes as low as possible	29%	41% <input checked="" type="checkbox"/>

Which of the following is **MORE** likely to decide your vote?

55%

Party best able to deliver
a **change in direction**
and policy.

+11 SINCE START

45%

Party best able to handle
impact of **Donald**
Trump's decisions

-11 SINCE START

If there is a federal election later this year, which of the following is **MORE** likely to decide your vote?

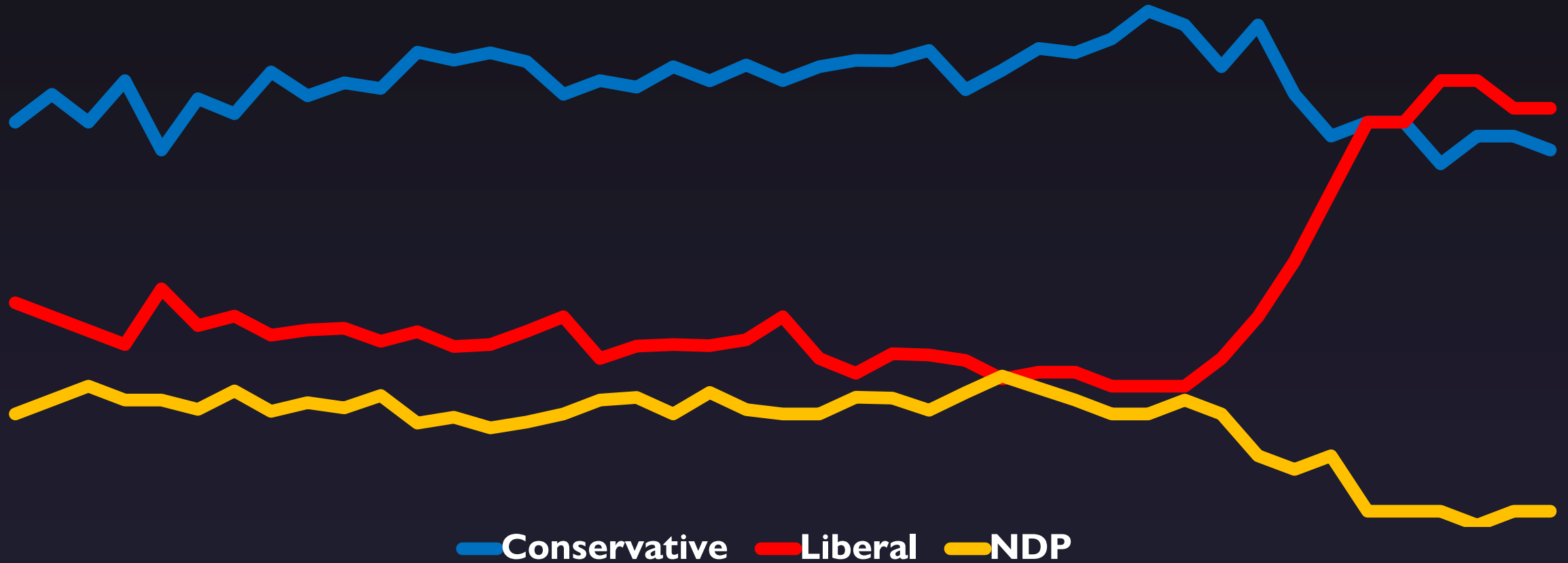
TRUMP

LIBERAL	61%
CONSERVATIVE	23%
NDP	8%

CHANGE

CONSERVATIVE	57%
LIBERAL	30%
NDP	5%

CURRENT FEDERAL VOTE INTENTION



FEDERAL ELECTION RESULTS

NATIONAL

LIBERAL	44%
CONSERVATIVE	41%
NDP	6%
BQ	6%
GREEN	1%
PEOPLE'S	1%

FEDERAL ELECTION RESULTS

	BC	AB	PRAIRIES	ON	QC	ATLANTIC
LIBERAL	42%	28%	34%	49%	42%	54%
CONSERVATIVE	41%	64%	56%	44%	23%	38%
NDP	13%	6%	11%	5%	4%	4%
BQ	-		-	-	28%	-

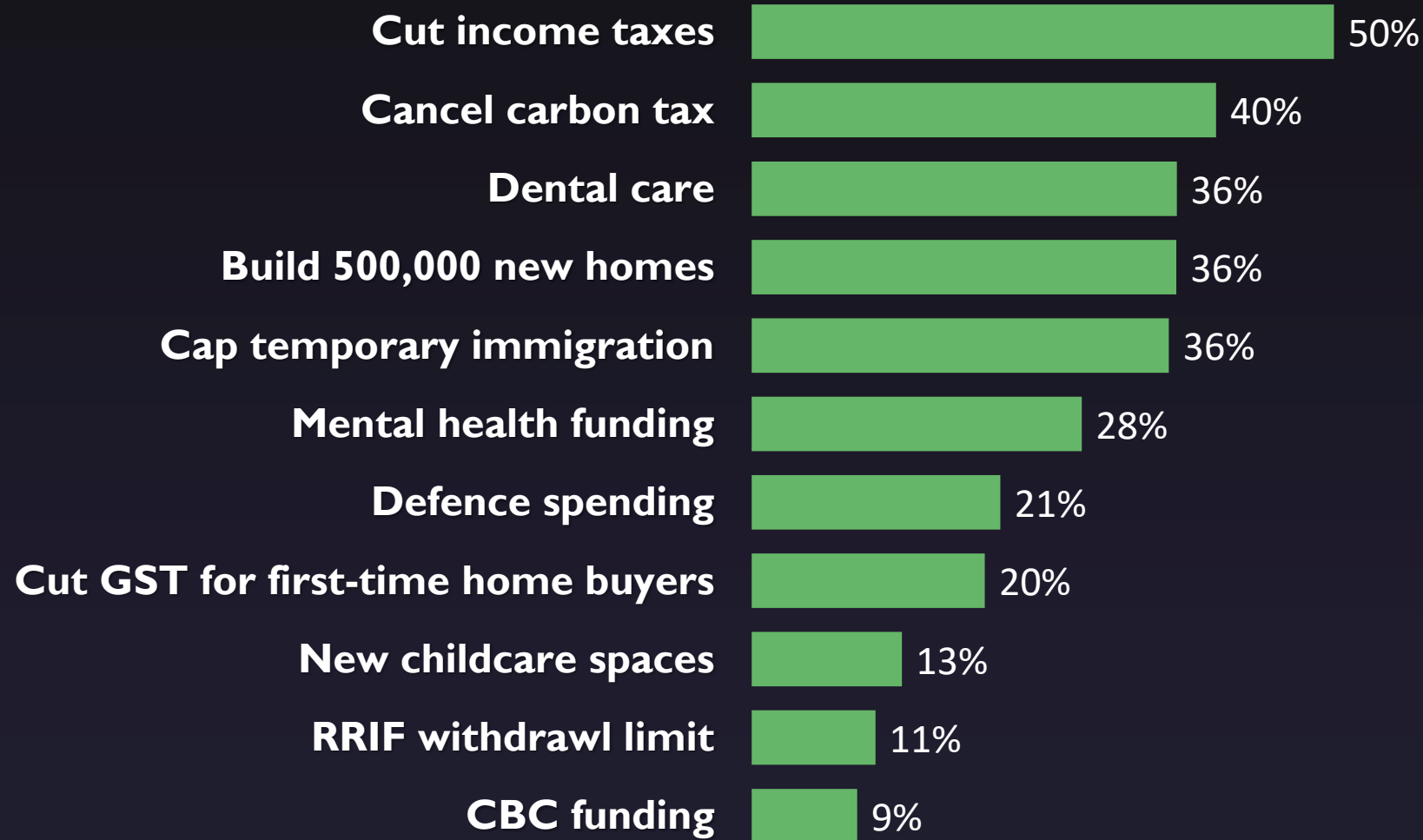
VOTE CHOICE BY AGE/GENDER

	18 to 29	30 to 44	45 to 59	60+
LIBERAL	46%	40%	40%	49%
CONSERVATIVE	39%	46%	43%	38%
NDP	7%	7%	8%	5%
BQ	5%	5%	8%	6%

A Canadian flag is shown waving on a flagpole against a dark, cloudy sky. The flag features a red field with a white square in the center, containing a red maple leaf. The text is overlaid on the right side of the flag.

**What does this mean
for the new
government and
public policy?**

WHAT THREE SHOULD IT DO FIRST?





When it comes to dealing with the Trump administration, what approach do you think Canada should follow?

RECOMMENDED APPROACH IN DEALING WITH THE TRUMP ADMINISTRATION

**Work to convince the administration
to reduce or remove tariffs without
any retaliation**



43%

**Fight back with counter tariffs or other
forms of retaliation**



46%

Don't know



11%

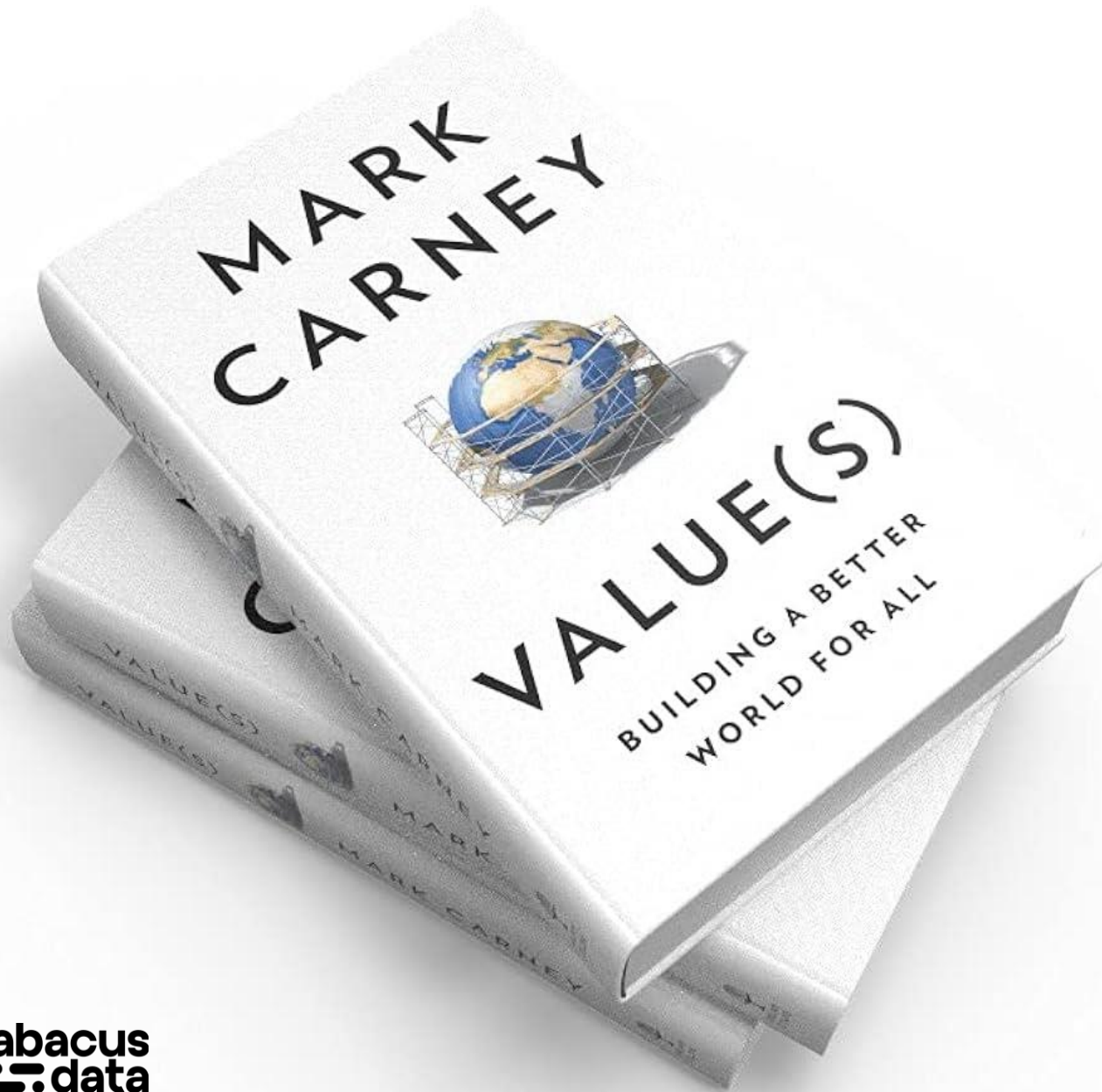
[Base] n=1,979



THE LOGIC | ABACUS DATA



The Logic



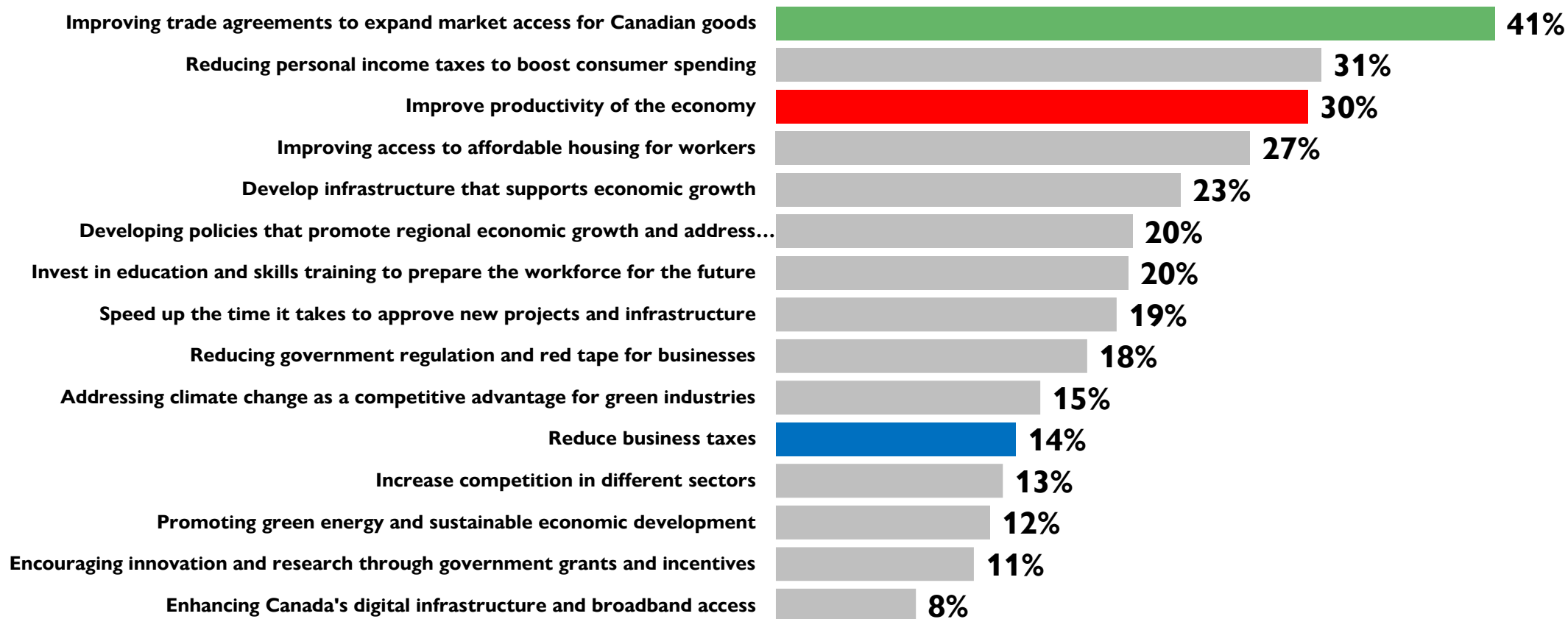
What *Value(s)* suggests about Carney's government...

1. Decarbonization as a central imperative.
2. Long-term investment in resilience and infrastructure.
3. Market design with social and environmental value in mind.
4. Fair transition & affordability.
5. Data, transparency, and accountability.



Below are some things governments in Canada could do to help grow the economy and make Canada more competitive and attractive to growing businesses. Please select the three you think are most important to growing the economy and making Canada more competitive.

HELPING GROW THE ECONOMY AND MAKING CANADA MORE COMPETITIVE



[Base] n=1,682



WHERE TO NEXT?

Questions?

Get in touch to learn more.



David Coletto

CEO and Founding Partner | Abacus Data

Infinitely curious, passionate, and eternally optimistic – three words to describe David Coletto, the founder, chair, and CEO of Abacus Data. Since launching in 2010, Coletto has grown Abacus Data into one of Canada's most respected, full-service market research and strategy firms. Coletto is one of Canada's best known and most respected public opinion analysts, pollsters, and social researchers. He is also one of Canada's leading experts on generational change and was recently named one of the Top 100 Most Influential People in Canadian politics by The Hill Times.

With a career spanning over two decades, Coletto is the official pollster of the Toronto Star and has worked with many of the world's most respected brands, associations, corporations, and non-profits. In his timely, data-driven keynote presentations, he delivers strategic insights, customized to his audiences and the industries they serve. He has worked with or spoken to a variety of clients including: Google, Airbnb, TD Bank, Interac, Canadian Medical Association, Government of Canada, Dairy Farmers of Canada, WorkSafe BC, Imperial Oil, BMW, and the LCBO, among others. He is also frequently called upon by local, national and international news organizations to assess public, helped elect the Mayors of Ottawa and Vancouver, and advised political leaders at all levels of government.

Having devoted his life to exploring what people think and feel about their work, lives, and politics, Coletto is an in-demand keynote speaker. He has spoken to thousands of people, in audiences ranging from massive national conferences to intimate briefings in boardrooms across North America and Europe. Coletto believes that by understanding what motivates and informs people's worldview, we can create a more understanding, empathetic, and action-driven world.

Coletto earned a PhD in political science from the University of Calgary. He is currently a professor in the Graduate Program of Political Management at Carleton University, where he teaches courses in polling, political marketing, and designing public affairs strategies. He also curates and writes the newsletter, "inFocus with David Coletto", which is read by thousands of business, political, and community leaders.



Steven Maynard

Managing Partner, Government and Public Sector | EY Canada

steven.maynard@ca.ey.com

Business transformation comes in all shapes and sizes. As our EY Canada Government and Public Sector Consulting Leader, Steven empowers clients to evolve for the better through enterprise-wide technology programs and modernization initiatives. He has led transformation working for Governments as well as leading transformation as an executive within Government.

For 25 years, Steven has led technology-enabled transformation programs across Financial Services, Telecommunications, Energy and Government & Public Sector. He's also driven results for clients in North and South America, Europe and the Middle East. Steven's integrated approach to connecting back-office capabilities with front-office experiences enables organizations to derive benefits right across functional units, priority areas, and teams.

He holds a Bachelor's degree in political science and economics from Mount Allison University. Steven has also earned a Master's of Business Administration, Corporate Finance & Strategy, from Queen's University. He has completed a global executive program on organizational leadership at London Business School and holds several professional designations. A big believer in community involvement, Steven's held executive and board level positions within charities and not-for-profits.



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