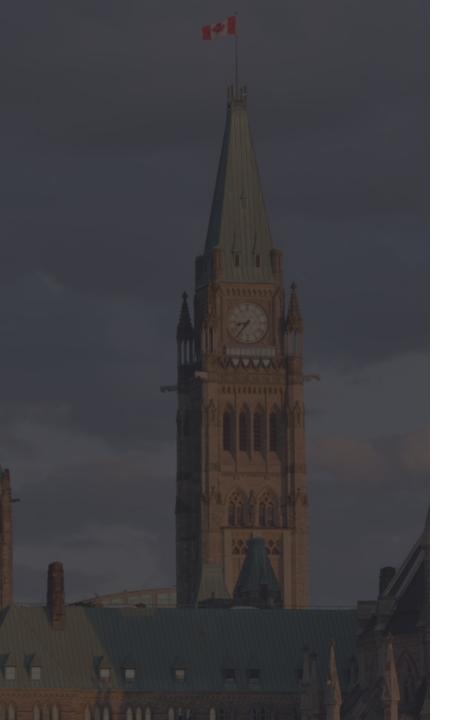
Positive views on the performance of the federal government and international reputation break records with 17-year lows – Tracking Study.





The research gauged the views of Canadians on the current federal government, the direction of the country, the relationship between the federal and provincial governments, and Canada's international reputation.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,006 Canadians, 18 years of age or older, between December 27th to 29th, 2023 as part of an omnibus survey. The margin of error for this survey is ±3.1 percentage points, 19 times out of 20.

The research was conducted by Nanos Research.

Key Findings

1

FEDERAL PERFORMANCE

Canadians are seven times more likely to describe the current government's performance as very poor (37%) rather than very good (five per cent), marking a 17-year low of positive views (five per cent very good; 18% somewhat good) and a decline of 10 percentage points since 2022.

2

INTERNATIONAL REPUTATION

The proportion of Canadians who say Canada's international reputation has improved is at an all-time low (three per cent, the smallest proportion since six per cent in 2021), with 13 times more Canadians saying it has not improved (39%) rather than improved (three per cent) in the past year.

3

FED-PROV RELATIONS

to have negative rather than positive views on relations between the federal government and the provincial governments over the past year, with about one in two who say relations have not improved (32%) or somewhat not improved (23%) compared to just over one in ten who say they have improved (one per cent) or somewhat improved (12%).



DIRECTION OF COUNTRY

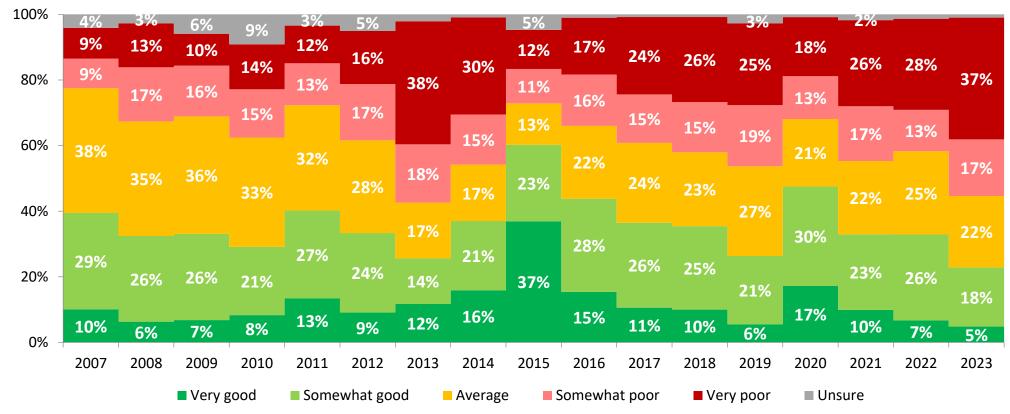
An increased proportion of Canadians say Canada is heading in the wrong direction (49%), a nine-percentage point increase since 2022 and the second highest proportion saying Canada is headed in the wrong direction since tracking began, while 31 per cent think it is moving in the right direction (40% in 2022).



Performance of the federal government – Tracking

Q - Would you describe the performance of the current Federal Liberal Government led by Prime Minister Justin Trudeau as very good, somewhat good, average, somewhat poor or very poor?

Would you describe the performance of the current Federal Conservative Government led by Prime Minister Stephen Harper as very good, somewhat good, average, somewhat poor or very poor? (2007-2014 waves)



^{*}Weighted to the true population proportion.



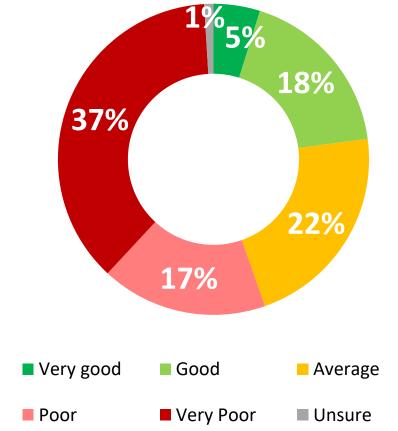
^{*}Charts may not add up to 100 due to rounding.

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Performance of the federal government

Canadians are 7x more likely

to describe the federal government's performance as very poor (37%) rather than very good (five per cent), with positive views reaching an all-time tracking low. Twenty-two per cent describe the performance of the government as average.

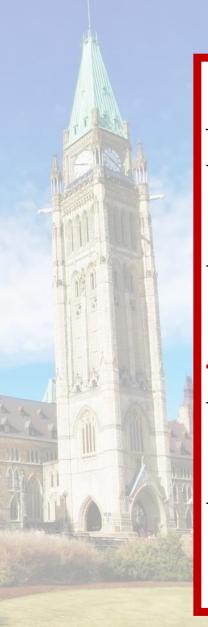


^{*}Weighted to the true population proportion.

Q - Would you describe the performance of the current Federal Liberal Government led by Prime Minister Justin Trudeau as very good, somewhat good, average, somewhat poor or very poor?



^{*}Charts may not add up to 100 due to rounding.



Performance of the federal government by demographics

Q - Would you describe the performance of the current Federal Liberal Government led by Prime Minister Justin Trudeau as very good, somewhat good, average, somewhat poor or very poor?

	Ve	ery good/somewhat good		
Atlantic (n=106)	Quebec (n=255)	Ontario (n=339)	Prairies (n=195)	BC (n=111)
32.4%	22.5%	25.1%	13.5%	24.6%
Men (n=557)	Women (n=447)	18 to 34 (n=192)	35 to 54 (n=320)	55 plus (n=494)
20.0%	25.6%	20.6%	20.7%	26.1%
		Average		
Atlantic (n=106)	Quebec (n=255)	Ontario (n=339)	Prairies (n=195)	BC (n=111)
15.7%	32.6%	21.8%	15.9%	13.8%
 Men (n=557)	Women (n=447)	18 to 34 (n=192)	35 to 54 (n=320)	55 plus (n=494)
18.5%	24.8%	22.6%	22.8%	20.4%



Performance of the federal government by demographics continued

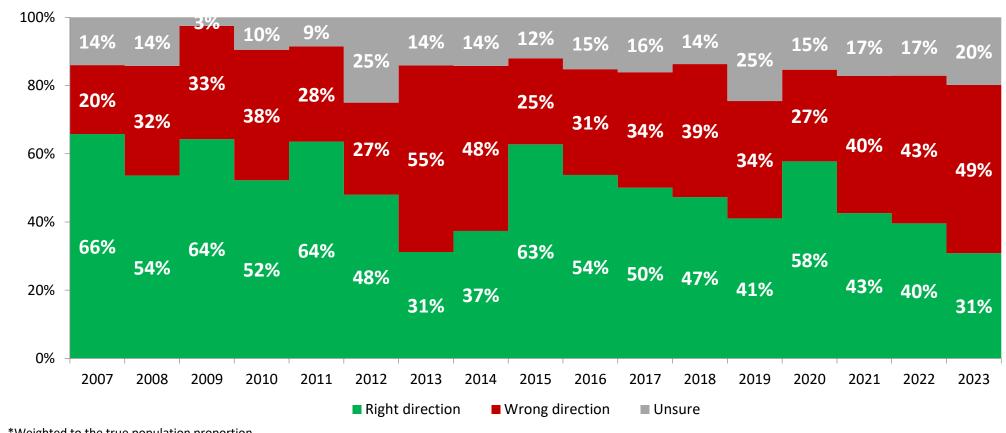
Q - Would you describe the performance of the current Federal Liberal Government led by Prime Minister Justin Trudeau as very good, somewhat good, average, somewhat poor or very poor?

	Ve	ery poor/somewhat poor		
Atlantic (n=106)	Quebec (n=255)	Ontario (n=339)	Prairies (n=195)	BC (n=111)
51.9%	43.2%	52.8%	69.7%	59.5%
Men (n=557)	Women (n=447)	18 to 34 (n=192)	35 to 54 (n=320)	55 plus (n=494)
61.3%	48.0%	56.1%	54.8%	53.0%
		Unsure		
Atlantic (n=106)	Quebec (n=255)	Ontario (n=339)	Prairies (n=195)	BC (n=111)
-	1.7%	0.3%	0.9%	2.0%
Men (n=557)	Women (n=447)	18 to 34 (n=192)	35 to 54 (n=320)	55 plus (n=494)
0.2%	1.7%	0.7%	1.7%	0.6%



© NANOS RESEARCH Direction of the country – Tracking

Q - Would you say that Canada as a country is moving in the right direction or the wrong direction?



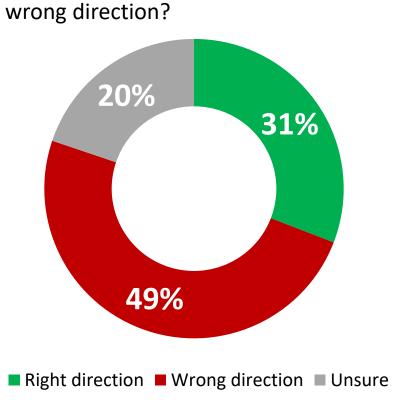
^{*}Weighted to the true population proportion.



^{*}Charts may not add up to 100 due to rounding.

Direction of the country

Q – Would you say that Canada as a country is moving in the right direction or the



	Atlantic	Quebec	Ontario	Prairies	BC
	(n=106)	(n=255)	(n=339)	(n=195)	(n=111)
rection	38.3%	31.4%	32.0%	22.9%	33.4%
Right direction	Men	Women	18 to 34	35 to 54	55 plus
	(n=557)	(n=447)	(n=192)	(n=320)	(n=494)
	28.0%	33.5%	27.8%	29.5%	33.8%
	Atlantic	Quebec	Ontario	Prairies	BC
	(n=106)	(n=255)	(n=339)	(n=195)	(n=111)
irectior	42.8%	43.0%	47.8%	59.4%	54.7%
Wrong direction	Men	Women	18 to 34	35 to 54	55 plus
	(n=557)	(n=447)	(n=192)	(n=320)	(n=494)
	55.3%	43.8%	51.6%	54.1%	44.1%

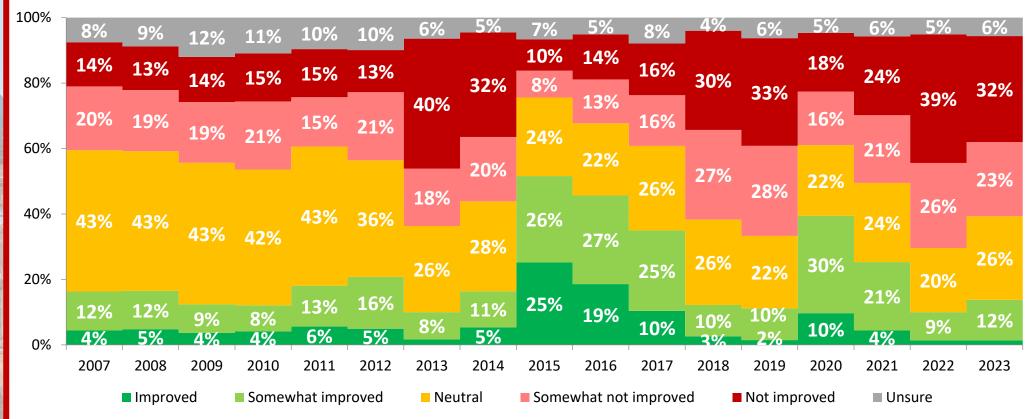


^{*}Weighted to the true population proportion.

^{*}Charts may not add up to 100 due to rounding.

Change in federal-provincial relations – Tracking

Q - On a scale of 1 to 5, where 1 is not improved and 5 is improved, how would you rate the relationship between the federal government and the provincial governments over the past year?

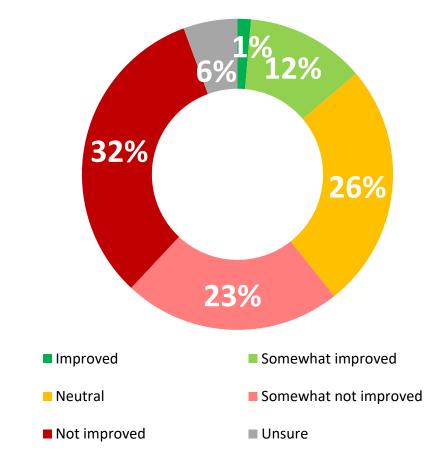


^{*}Weighted to the true population proportion.



^{*}Charts may not add up to 100 due to rounding.





^{*}Weighted to the true population proportion.

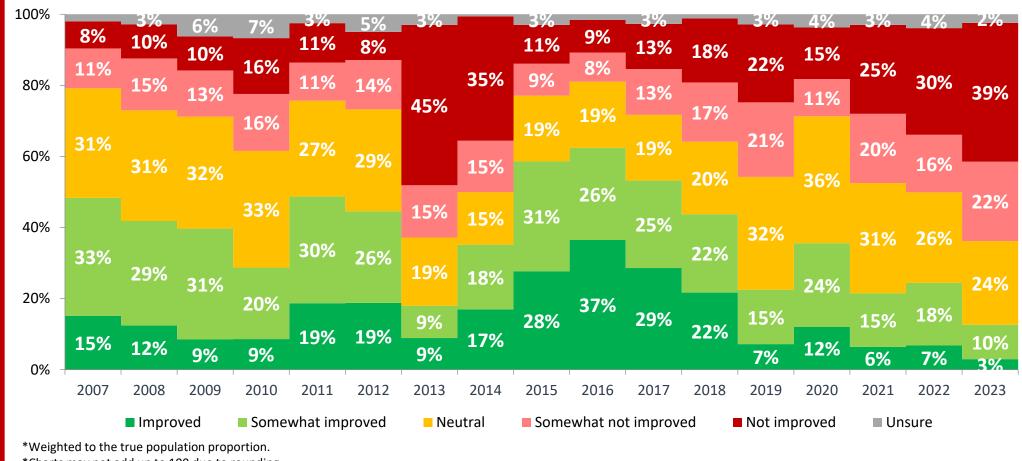
Q – On a scale of 1 to 5, where 1 is not improved and 5 is improved, how would you rate the relationship between the federal government and the provincial governments over the past year?



^{*}Charts may not add up to 100 due to rounding.

Change in the international reputation of Canada – Tracking

Q – On a scale of 1 to 5, where 1 is not improved and 5 is improved, how would you rate Canada's reputation around the world over the past year?

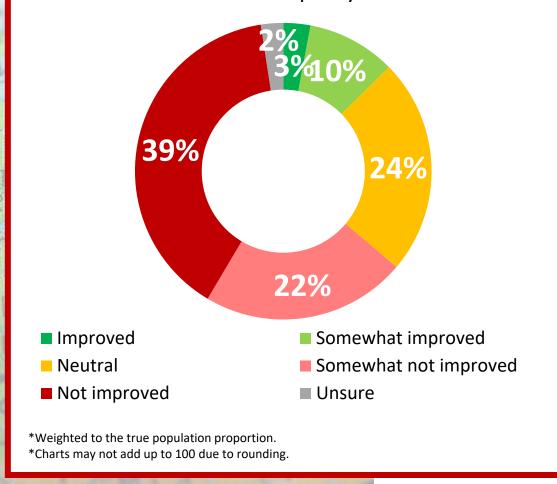


^{*}Charts may not add up to 100 due to rounding.



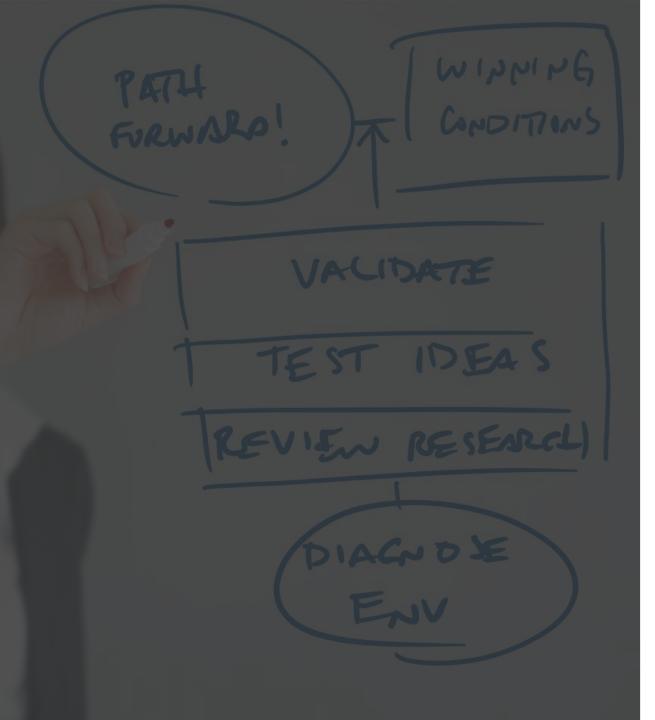
Change in the international reputation of Canada

Q – On a scale of 1 to 5, where 1 is not improved and 5 is improved, how would you rate Canada's reputation around the world over the past year?



ıat	Atlantic	Quebec	Ontario	Prairies	BC
	(n=106)	(n=255)	(n=339)	(n=195)	(n=111)
omewk	10.7%	15.4%	14.4%	7.9%	10.1%
Improved/ Somewhat	Men	Women	18 to 34	35 to 54	55 plus
improved	(n=557)	(n=447)	(n=192)	(n=320)	(n=494)
<u>E</u>	11.0%	14.2%	11.0%	10.0%	15.8%
hat not	Atlantic	Quebec	Ontario	Prairies	BC
	(n=106)	(n=255)	(n=339)	(n=195)	(n=111)
omew	54.2%	56.2%	60.9%	71.6%	62.2%
Not improved/ Somewhat not	Men	Women	18 to 34	35 to 54	55 plus
improved	(n=557)	(n=447)	(n=192)	(n=320)	(n=494)
Not in	65.5%	57.5%	61.3%	62.2%	60.8%





Nanos conducted an RDD dual frame (land- and celllines) hybrid telephone and online random survey of 1,006 Canadians, 18 years of age or older, between December 27th and 29th, 2023 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,006 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was conducted by Nanos Research.

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

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,021 Canadians, 18 years of age or older, between December 19th to 22nd, 2022 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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.

Nanos conducted an RDD dual frame (land-and cell-lines) hybrid telephone and online random survey of 1,005 Canadians, 18 years of age or older, between December 22nd to 23rd, 2021 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,048 Canadians, 18 years of age or older, between December 27th to 30th, 2020 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,010 Canadians, 18 years of age or older, between December 22nd and 29th, 2019 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between November 30th and December 5th, 2018 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. This study is a joint initiative between Nanos Research and the Institute for Research on Public Policy.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between December 27^{th} and 29^{th} , 2017 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20. This study is a joint initiative between Nanos and the Institute for Research on Public Policy.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between December 16^{th} and 19^{th} , 2016 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.The research was conducted for the Institute for Research on Public Policy.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between December 18th and 21st, 2015 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20. The research was conducted for the Institute for Research on Public Policy.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians between November 15^{th} and 18^{th} , 2014 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20. The research was conducted for the Institute for Research on Public Policy .

National Nanos RDD Crowdsource random survey of 1,000 Canadians conducted between December 14^{th} and 16^{th} , 2013 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

Element	Description	Element	Description					
Research sponsor	Nanos Research	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					
Population and Final Sample Size	1,006 Randomly selected individuals.		disclosure.					
Source of Sample	Nanos Probability Panel	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					
Type of Sample	Probability		data.					
Margin of Error	± 3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.					
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Demographics	illes, and individuals without internet access could not participate.					
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	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.					
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.	Estimated Response Rate	Ten percent, consistent with industry norms.					
Fieldwork/Validation	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.					
Number of Calls	Maximum of five call backs to those recruited.		Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, legislative priorities,					
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Question Content	immigration, mortgages, temporary foreign workers, and affordable housing policies.					
Field Dates	December 27 th to 29 th , 2023.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.					
Language of Survey	The survey was conducted in both English and French.	Research/Data Collection Supplier	Nanos Research					
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/	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.					



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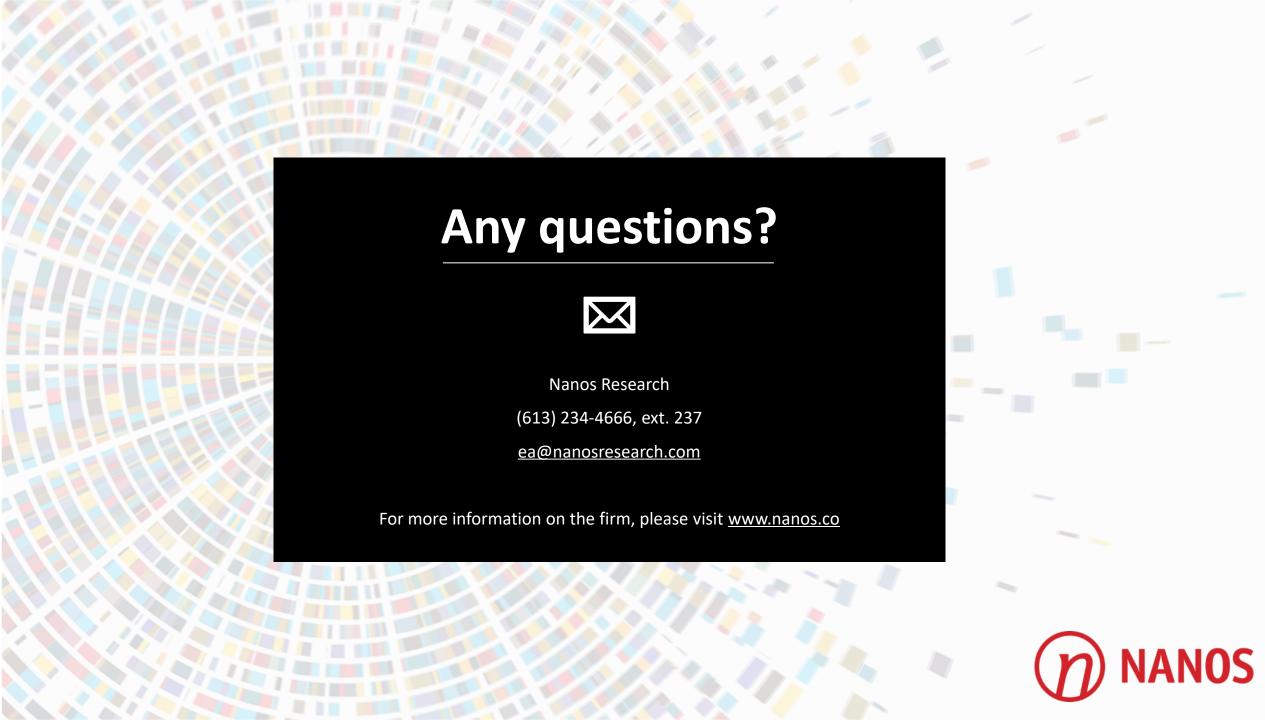


dimap

This international joint venture between <u>dimap</u> and <u>Nanos</u> 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

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





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2023-2523 - Nanos - Mood of Canada - STAT SHEET

					Reg	ion				Gender			Age	
			Canada 2023-					British			0.1			
			12	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	Other	18 to 34	35 to 54	55 plus
Question - Would you describe the performance of the current Federal Liberal Government led by Prime Minister Justin Trudeau as	Total	Unwgt	1006	106	255	339	195	111	557	447	2	192	320	494
		N												
		Wgt N	1002	67	232	389	175	139	490	510	2	267	324	411
	Very good	%	4.8	9.7	2.7	6.0	3.1	5.0	3.2	6.4		2.9	5.4	5.7
very good, somewhat good,	Somewhat good	%	18.1	22.7	19.8	19.1	10.4	19.6	16.8	19.1		17.8	15.3	20.4
average, somewhat poor or very poor?	Average	%	21.7	15.7	32.6	21.8	15.9	13.8	18.5	24.8		22.6	22.8	20.4
	Somewhat poor	%	17.3	21.2	22.6	16.1	15.1	12.6	17.2	17.4		13.4	16.4	20.5
	Very poor	%	37.1	30.7	20.6	36.7	54.6	47.0	44.2	30.5		42.7	38.4	32.5
	Undecided/unsure	%	1.0	0.0	1.7	0.3	0.9	2.0	0.2	1.7		0.7	1.7	0.6

				Region						Gender			Age	
			Canada 2023- 12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	Other	18 to 34	35 to 54	55 plus
Question - Would you say	Total	Unwgt N	1006	106	255	339	195	111	557	447	2	192	320	494
that Canada as a country is		Wgt N	1002	67	232	389	175	139	490	510	2	267	324	411
moving in the right direction or the wrong direction?	Right direction	%	30.9	38.3	31.4	32.0	22.9	33.4	28.0	33.5		27.8	29.5	33.8
of the wrong direction:	Wrong direction	%	49.3	42.8	43.0	47.8	59.4	54.7	55.3	43.8		51.6	54.1	44.1
	Unsure	%	19.8	18.8	25.6	20.3	17.7	11.9	16.7	22.7		20.5	16.4	22.1

					Reg	ion				Gender			Age	
			Canada 2023- 12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	Other	18 to 34	35 to 54	55 plus
Question - On a scale of 1 to 5, where 1 is not improved and 5 is improved, how would you rate the	Total	Unwgt N	1006	106	255	339	195	111	557	447	2	192	320	494
		Wgt N	1002	67	232	389	175	139	490	510	2	267	324	411
		Mean	2.2	2.1	2.5	2.4	1.6	2.2	2.1	2.3		2.1	2.2	2.3
relationship between the		Median	2.0	2.0	2.0	2.0	1.0	2.0	2.0	2.0		2.0	2.0	2.0
federal government and the	Not improved	%	32.4	37.6	14.7	28.6	62.2	32.6	38.6	26.4		37.3	32.8	28.9
provincial governments over	Somewhat not improved	%	22.7	21.9	36.2	19.5	14.5	19.6	20.6	24.7		18.3	22.5	25.6
the past year?	Neutral	%	25.5	21.7	30.3	26.9	13.5	30.8	22.5	28.4		24.2	25.1	26.7
	Somewhat improved	%	12.4	8.1	11.1	17.8	5.3	10.6	14.0	10.9		9.8	15.0	12.0
	Improved	%	1.4	2.4	2.0	1.7	0.3	0.5	0.8	1.9		1.2	0.5	2.2
	Unsure/Undecided	%	5.6	8.4	5.7	5.6	4.2	5.9	3.5	7.7		9.1	4.1	4.6



2023-2523 - Nanos - Mood of Canada - STAT SHEET

				Region						Gender		Age		
			Canada 2023-					British						
			12	Atlantic	Quebec	Ontario	Prairies	Columbia	Male	Female	Other	18 to 34	35 to 54	55 plus
Question – On a scale of 1 to	Total	Unwgt N	1006	106	255	339	195	111	557	447	2	192	320	494
5, where 1 is not improved		Wgt N	1002	67	232	389	175	139	490	510	2	267	324	411
and 5 is improved, how would you rate Canada's		Mean	2.1	2.3	2.3	2.1	1.8	2.0	2.0	2.2		2.1	2.1	2.2
reputation around the world		Median	2.0	2.0	2.0	2.0	1.0	2.0	2.0	2.0		2.0	2.0	2.0
over the past year?	Not improved	%	39.0	26.1	26.0	40.1	53.3	46.2	45.8	32.7		36.2	43.9	37.1
	Somewhat not improved	%	22.3	28.0	30.2	20.8	18.3	16.0	19.7	24.8		25.2	18.3	23.7
	Neutral	%	23.5	29.4	25.0	23.1	19.1	25.2	22.2	24.8		24.5	26.7	20.5
	Somewhat improved	%	9.7	6.4	12.4	11.7	4.5	7.7	8.6	10.8		7.8	6.8	13.2
	Improved	%	2.9	4.3	3.0	2.7	3.4	2.4	2.4	3.5		3.1	3.2	2.6
1	Unsure/Undecided	%	2.4	5.8	3.4	1.7	1.4	2.5	1.3	3.5		3.2	1.2	2.9