



Concern about US relations/Trump increasing.

Nanos Weekly Tracking, ending July 11, 2025
(released July 15, 2025)



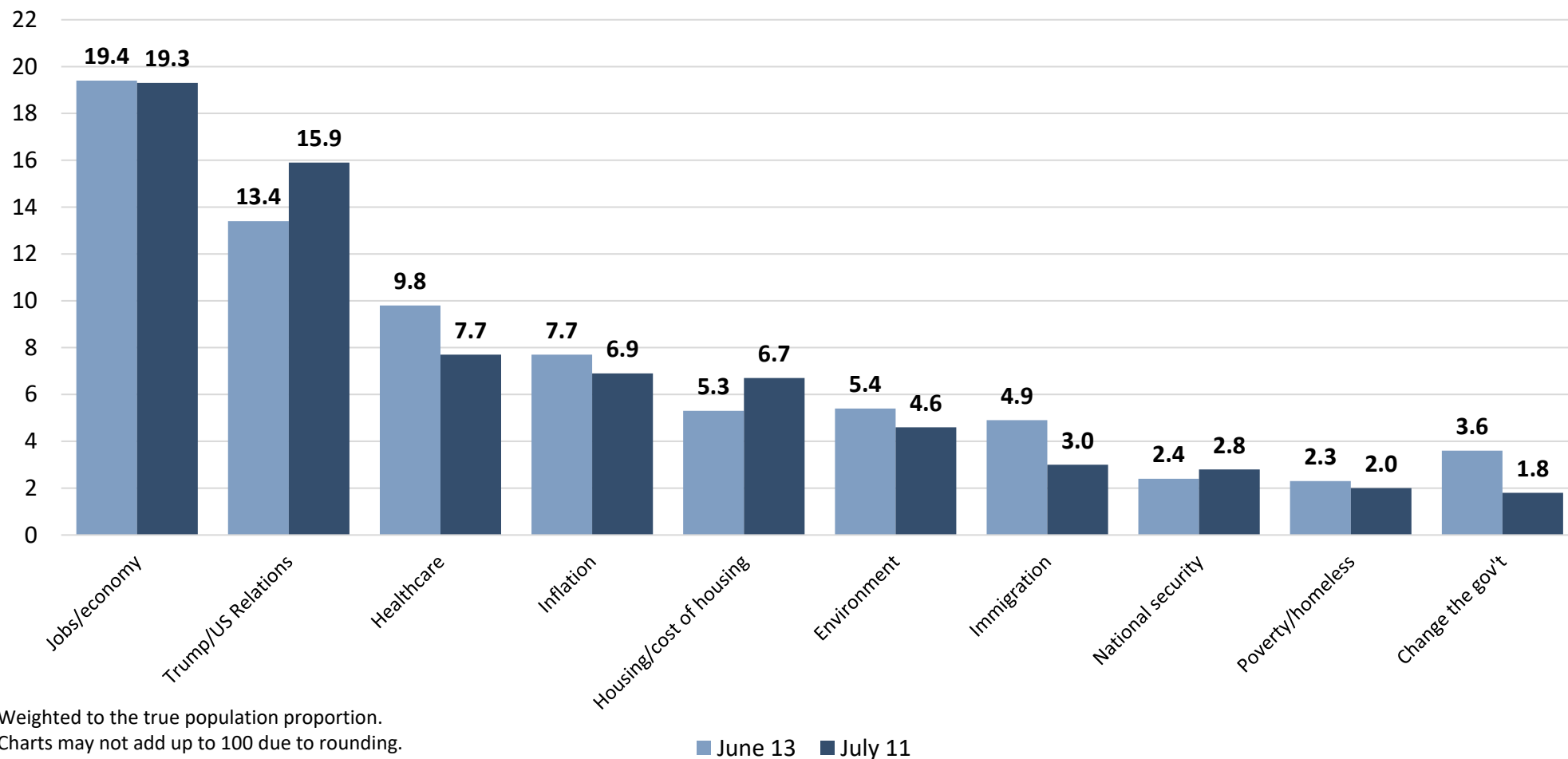
Nanos tracks unprompted issues of concern every week. To access full weekly national and regional tracking visit the Nanos subscriber [data portal](#).

“ The top two issues of concern among Canadians are jobs/the economy and US relations/Trump. Of note, concern about US relations/Trump has been on the upswing over the past four weeks. The Carney Liberals continue to have a double-digit lead over the Poilievre Conservatives. ”

***Nik Nanos
Chief Data Scientist***

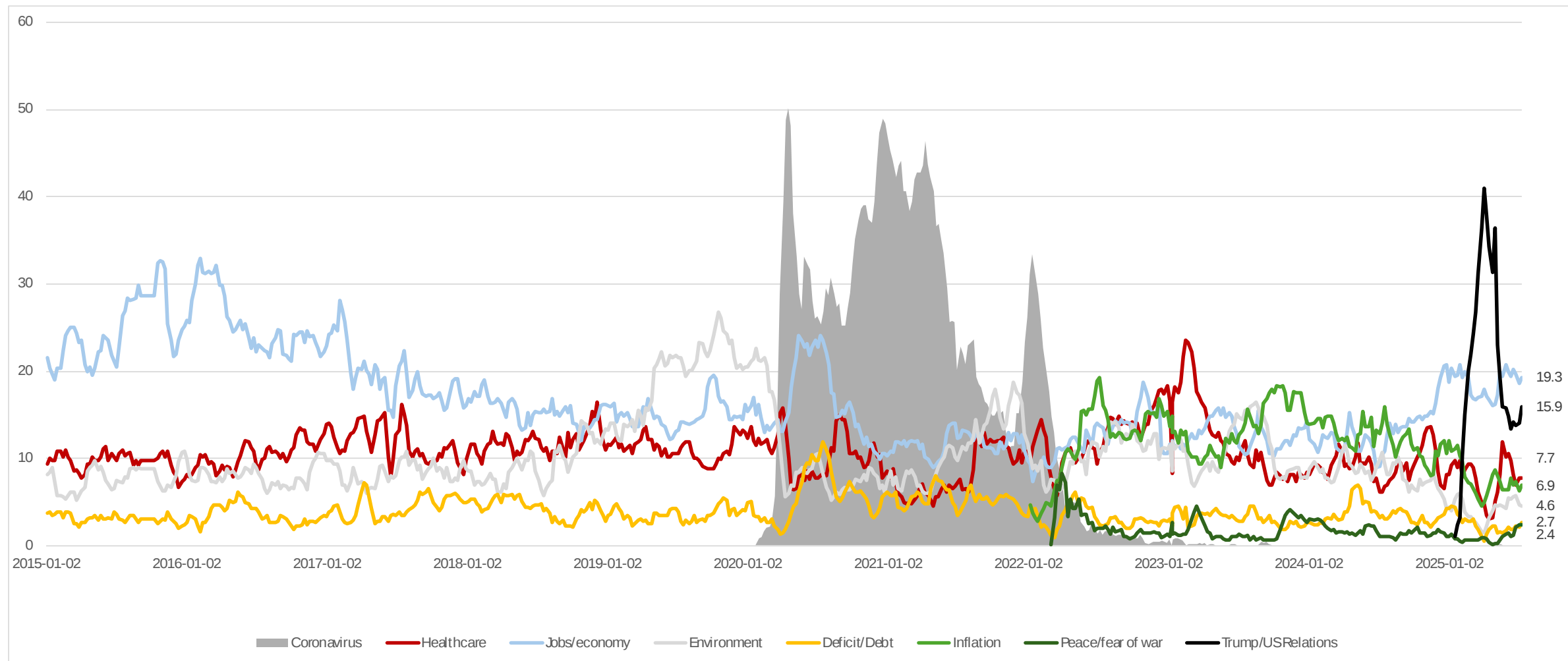
WEEKLY TOP TEN ISSUES – FOUR WEEK CHANGE

Question: What is your most important NATIONAL issue of concern? [UNPROMPTED]



Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.

LONGITUDINAL ISSUE TRACKING – LONG TERM



1,047 random interviews recruited from an RDD land- and cell-line sample of Canadians aged 18 years and over, ending July 11, 2025. The data is based on a four-week rolling average where each week the oldest group of 250 interviews is dropped and a new group of 250 is added. A random survey of 1,047 Canadians is accurate 3.0 percentage points, plus or minus, 19 times out of 20.

Q – What is your most important NATIONAL issue of concern? [UNPROMPTED]

1,047 random interviews recruited from and RDD land- and cell-line sample of Canadians aged 18 years and over, ending July 11, 2025. The data is based on a four-week rolling average where each week the oldest group of 250 interviews is dropped and a new group of 250 is added. A random survey of 1,047 Canadians is accurate 3.0 percentage points, plus or minus, 19 times out of 20

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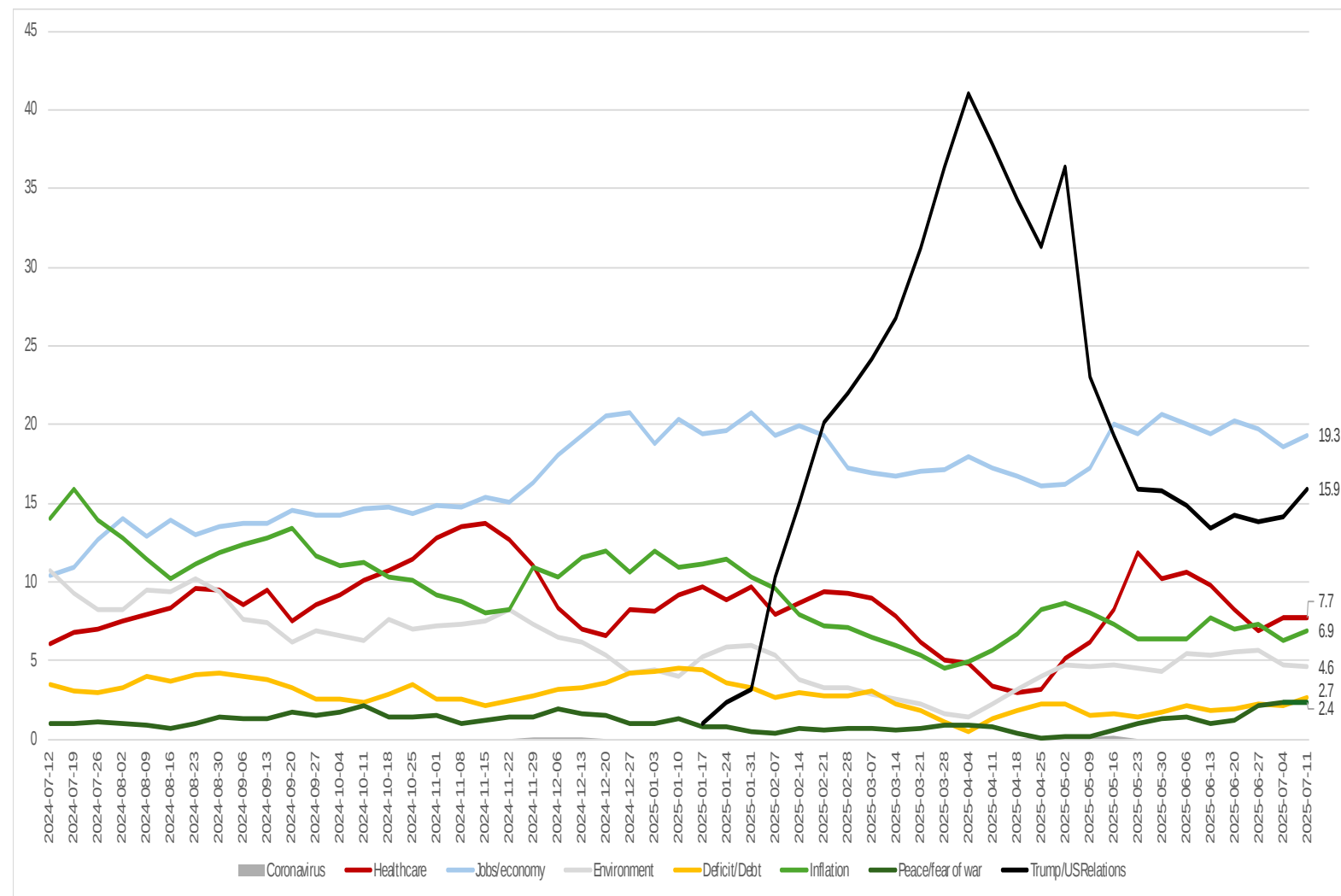
Website: www.nanos.co

Methodology: www.nanos.co/method

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Q – What is your most important NATIONAL issue of concern? [UNPROMPTED]

LONGITUDINAL ISSUE TRACKING – ONE YEAR TREND



*Weighted to the true population proportion.

*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.



NON-SUBSCRIBER REPORT

Every week Nanos captures the political pulse of the nation and is the authoritative go to data source. Here are this week's Nanos political tracking highlights. Play with the data at the interactive Nanos portal at <http://www.nanos.co/dataportal> > ballot tracking > issue tracking > policy tracking > cut the data by region and demographics and see the trend lines. Subscribe today > gain unlimited access to the Nanos data portals and tracking for \$5 a month.

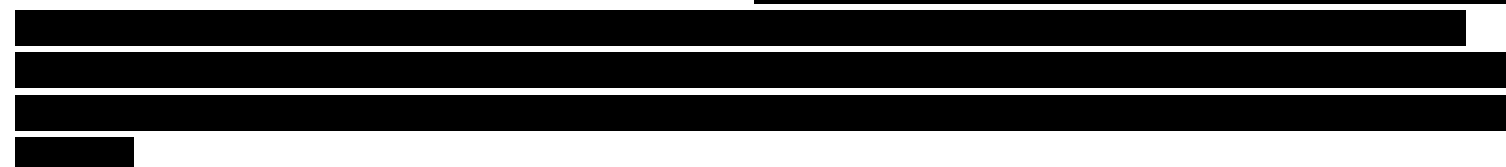
Ballot – The latest Nanos federal ballot tracking has the Liberals at 44.5 per cent, the Conservatives at 33.8 the NDP at 11.1 per cent, the Bloc at 5.9 per cent, the Green Party at 2.1 per cent and the Peoples Party at 1.9 per cent.

Accessible Voters – Asked whether they would consider voting for each of the federal parties, [REDACTED]



Nanos Party Power Index – The Nanos Index which is a composite of a series of measures including ballot and leadership impressions has the Liberals at 61.7 points, followed by the Conservatives at 45.8 points, the NDP with 32.7 points, the Greens 26.8 points, the People's Party 20.8 points and the BQ 36.5 points (QC only).

Qualities of a Good Political Leader – More than seven in ten [REDACTED]



Preferred Prime Minister – Nanos tracking has Carney as the preferred choice as PM at 52.1 per cent of Canadians followed by Poilievre (25.2%), Davies (1.8%), May (1.8%) and Bernier (1.4%). Fifteen per cent of Canadians were unsure whom they preferred.

Visit the live [Nanos data portal](#) where you can dynamically chart ballot, preferred PM and Nanos Index numbers by region, gender and age. The methodology for the weekly tracking is posted [here](#). PDFs of the polling reports are on the Nanos website.

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AT A GLANCE

RAPPORT POUR LES NON-ABONNÉS

Chaque semaine, Nanos capte le pouls politique de la nation et est une source de données incontournable. Voici les points saillants du suivi politique de Nanos cette semaine. Jouez avec les données du portail interactif Nanos à <http://www.nanos.co/dataportal> > suivi du scrutin > suivi des enjeux > suivi des politiques > examinez les données par région et démographie et voyez les lignes de tendance. **Abonnez-vous dès maintenant** > obtenez un accès illimité aux portails de données et au suivi Nanos pour 5 \$ par mois.

Scrutin – Selon le plus récent suivi de scrutin fédéral Nanos, les libéraux bénéficient de l'appui de 44,5 pour cent des Canadiens, suivi des conservateurs avec 33,8 pour cent, du NPD avec 11,1 pour cent, du BQ avec 5,9 pour cent, des verts avec 2,1 pour cent et du Parti Populaire du Canada avec 1,9 pour cent.

Électeurs accessibles – Lorsqu'on leur a demandé s'ils considéreraient voter pour chacun des partis fédéraux, [REDACTED]

[REDACTED]

Indice de puissance politique Nanos – Selon l'Indice Nanos, qui est composé d'une série de mesures incluant les préférences de votes et les impressions des chefs des partis, les libéraux ont 61,7 points, suivi des conservateurs avec 45,8 points, du NDP avec 32,7 points, des verts avec 26,8 points, du Parti Populaire du Canada avec 20,8 points et du BQ avec 36,5 points (QC seulement).

Qualités d'un bon leader politique – Plus de sept Canadiens sur dix [REDACTED]

[REDACTED]

Premier ministre préféré – Selon le suivi Nanos, Carney est le choix préféré comme Premier ministre de 52,1 pour cent des Canadiens, suivi de Poilievre (25,2 %), Davies (1,8 %), May (1,8 %) et Bernier (1,4 %). Quinze pour cent des Canadiens étaient incertains de leur préférence.

Visitez le portail de données courantes de Nanos où vous pouvez interagir avec les graphiques du scrutin, du PM préféré et de l'Indice Nanos et filtrer par région, sexe et âge. La méthodologie pour le suivi hebdomadaire est publiée ici. Les fichiers PDF des rapports des sondages se trouvent sur le site Web de Nanos.

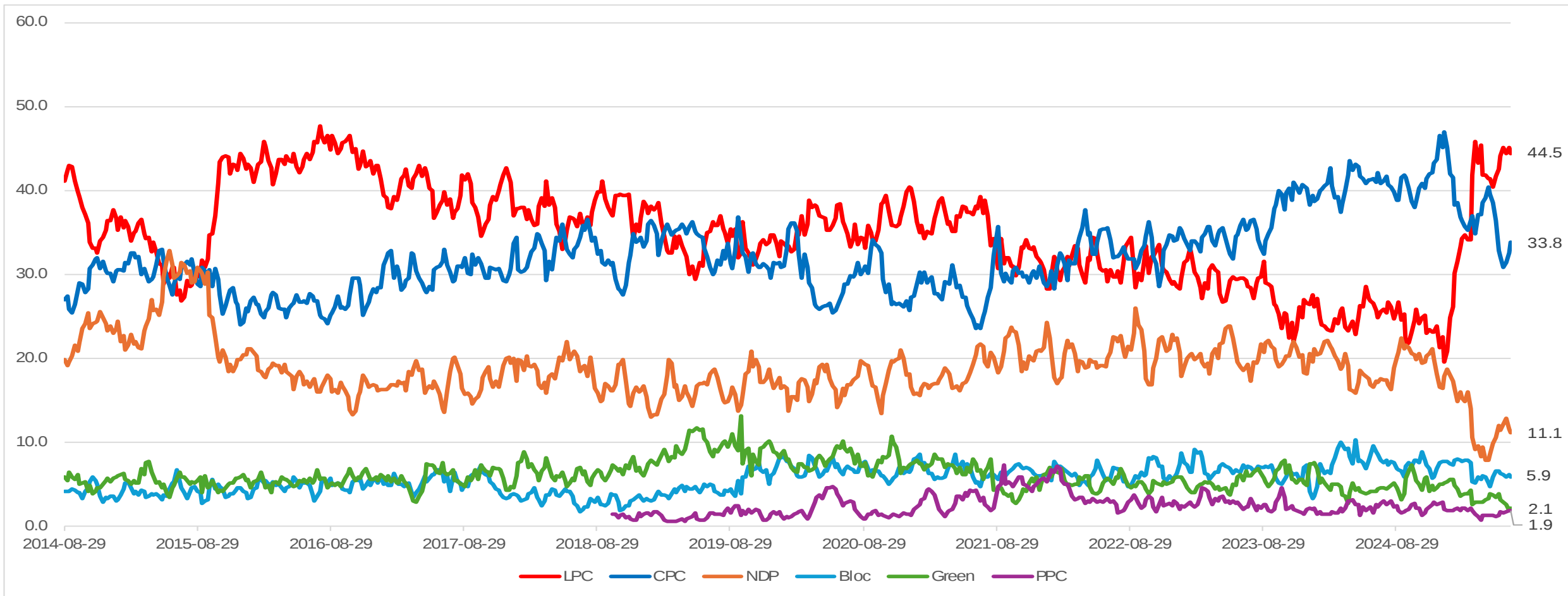
Contactez: Nik Nanos, Chef des données

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APERÇU

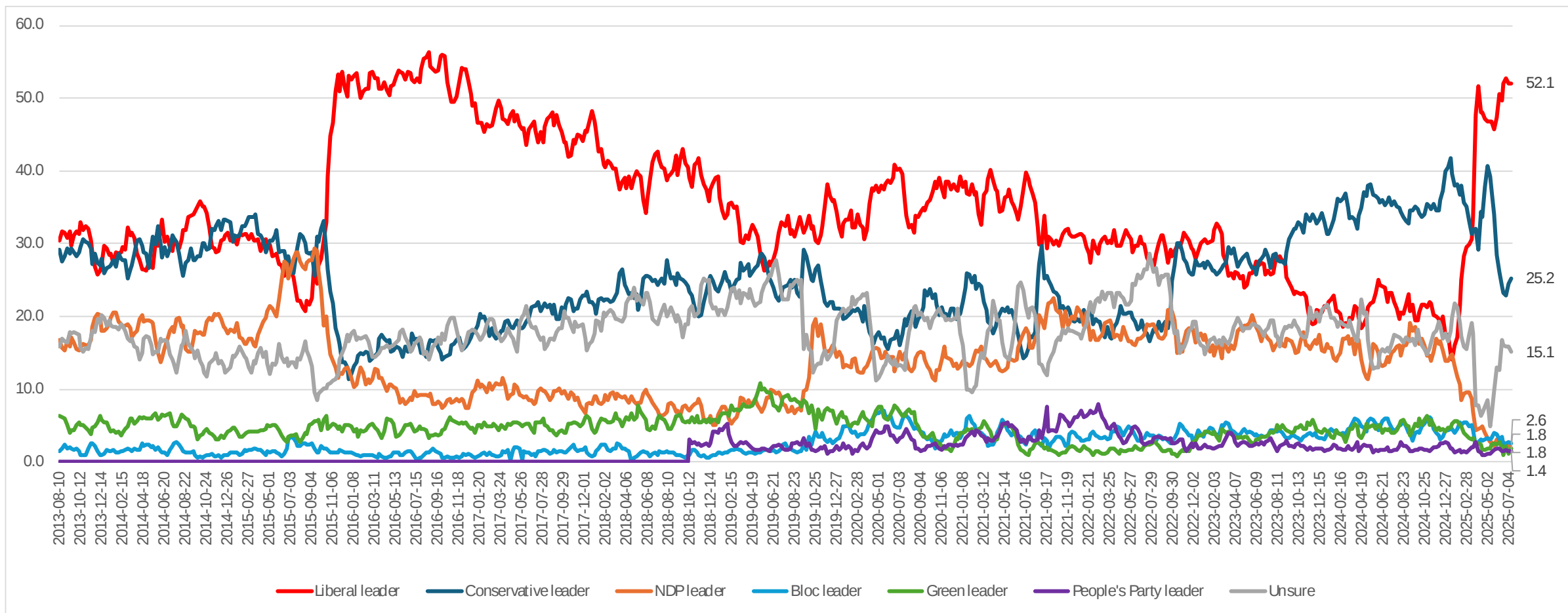
Ballot – LONG TERM

National – Weekly Tracking
(Ending July 11, 2025, n=870)



Question: For those parties you would consider voting for federally, could you please rank your **top two current local** preferences? [Unprompted] [1ST CHOICE, 2ND CHOICE RANK]

**National – Weekly Tracking – Preferred Prime Minister First Ranked Choice
(Ending July 11, 2025, n=1,047)**

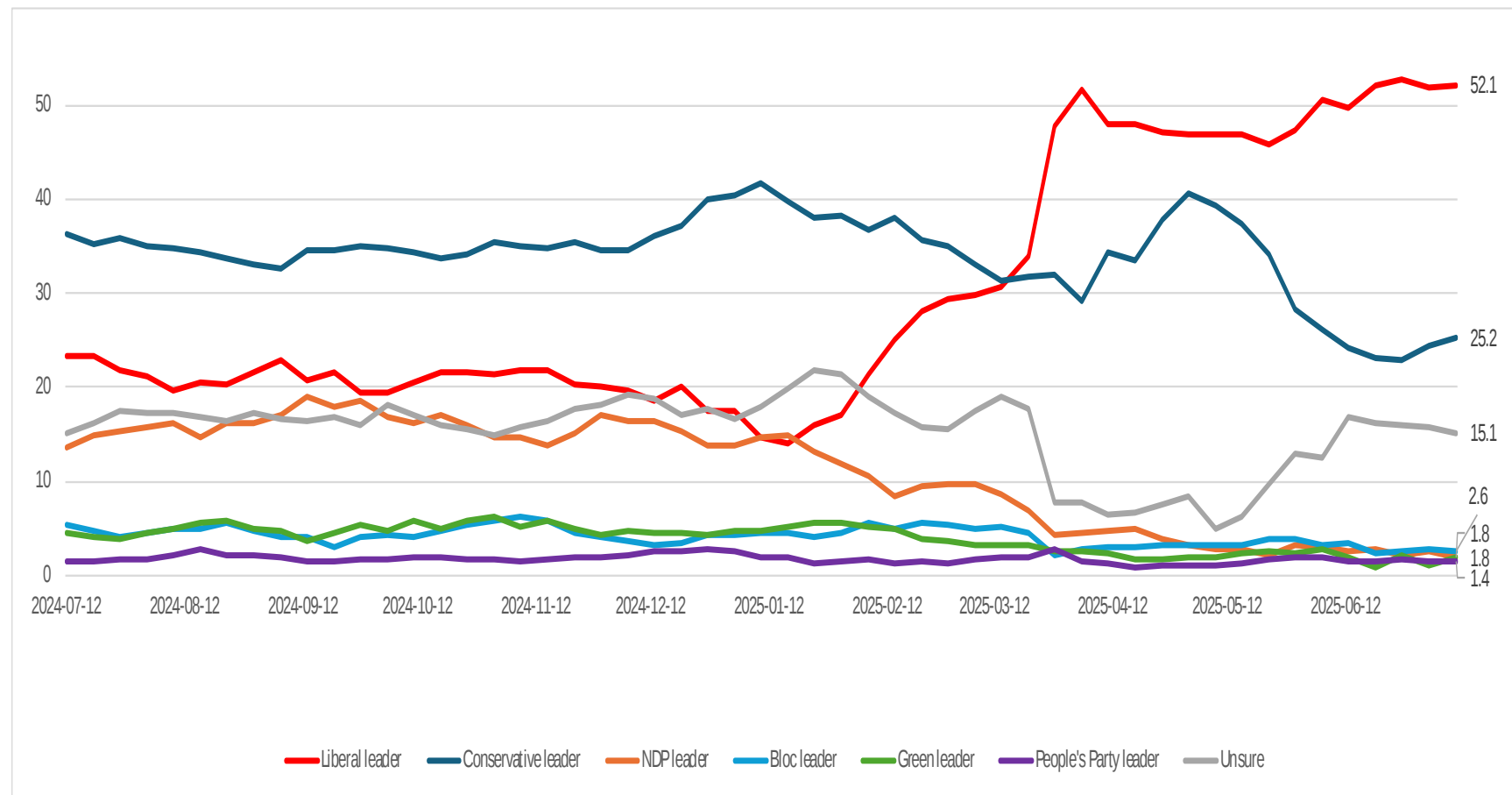


Question: Of the current federal political party leaders, could you please rank your top two current local preferences for Prime Minister? [ROTATE PARTY LEADERS]

PREFERRED PM – ONE YEAR

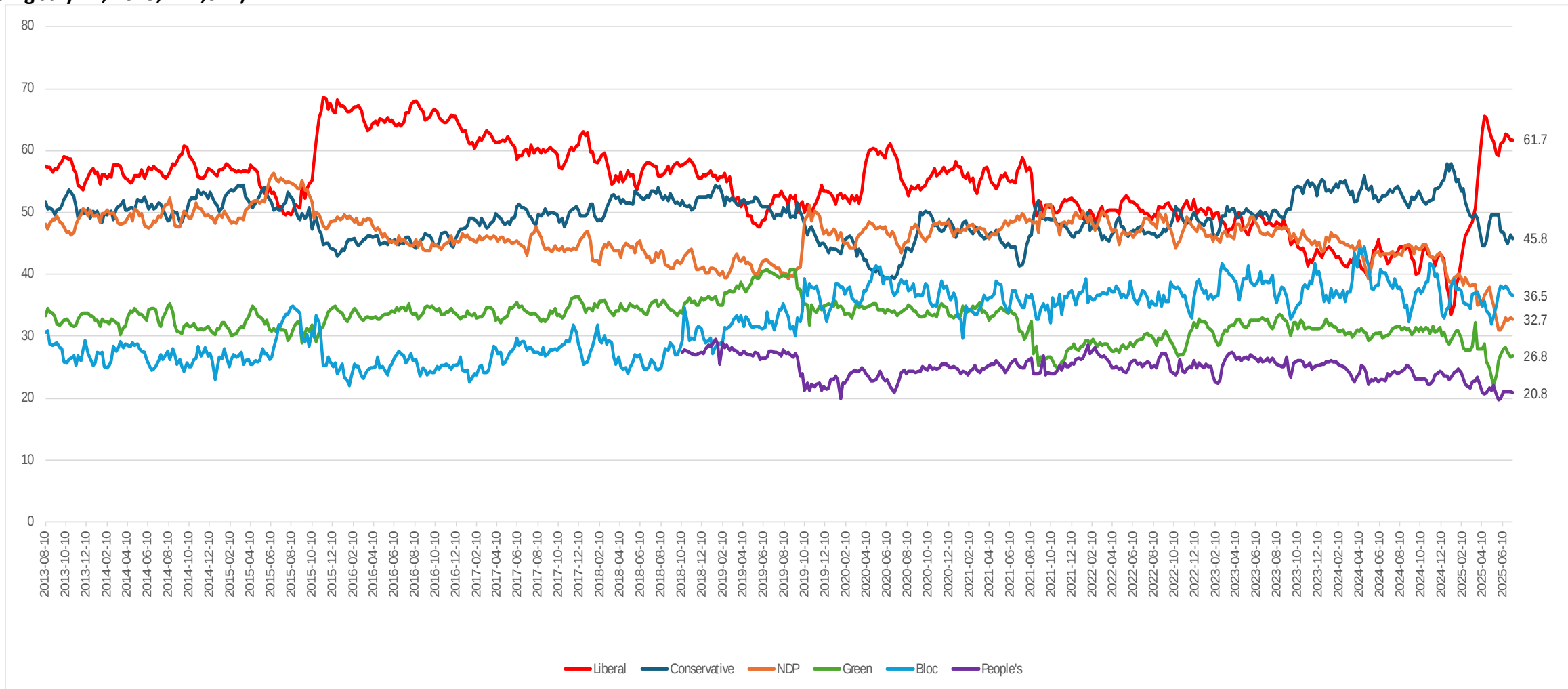
National – Weekly Tracking – Preferred Prime Minister First Ranked Choice
(Ending July 11, 2025, n=1,047)

Question: Of the current federal political party leaders, could you please rank your top two current local preferences for Prime Minister? [ROTATE PARTY LEADERS]



PARTY POWER INDEX – LONG TERM

National – Weekly Tracking – Preferred Prime Minister First Ranked Choice
(Ending July 11, 2025, n=1,047)



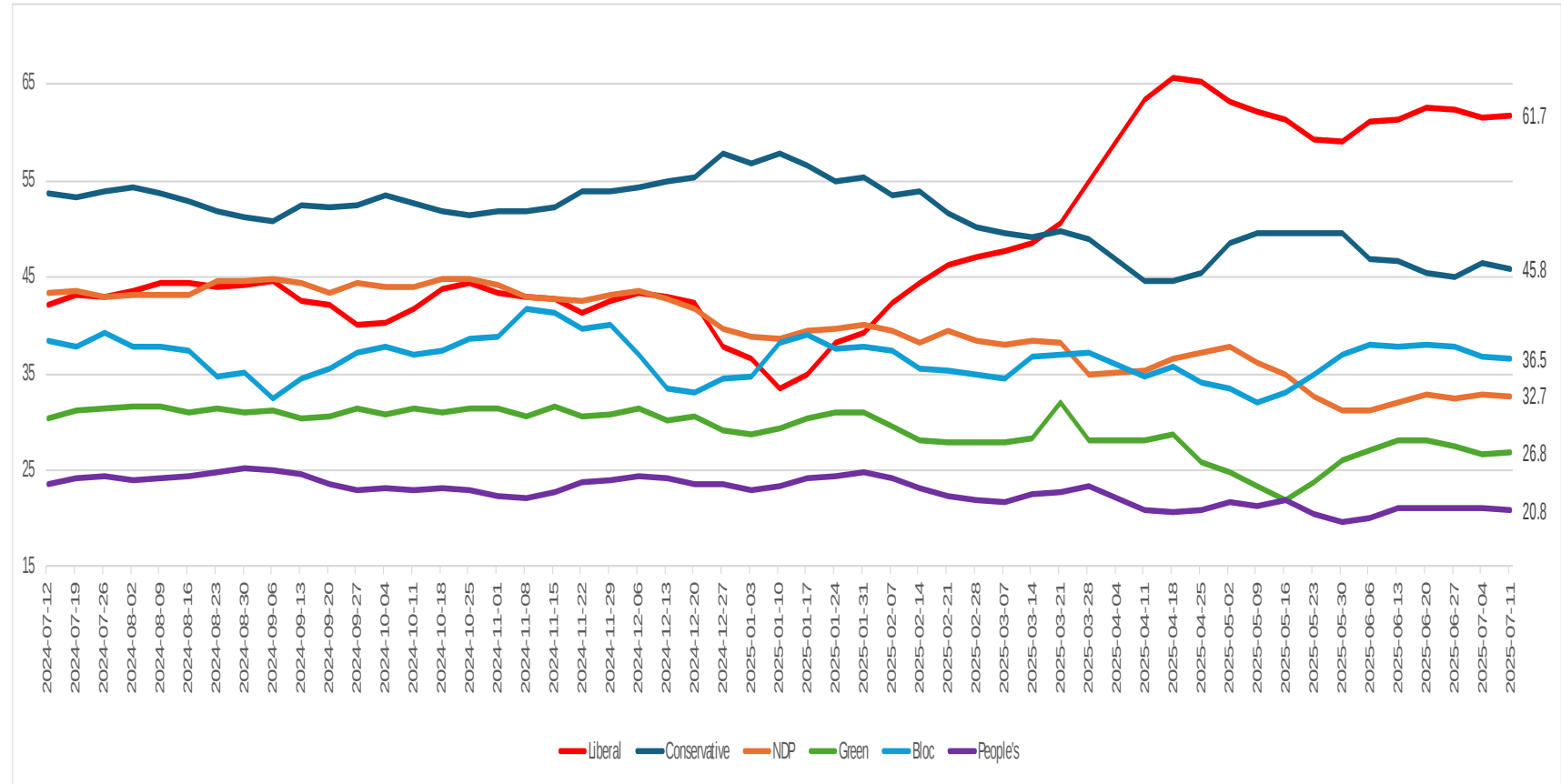
The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.



PARTY POWER INDEX – ONE YEAR

National – Weekly Tracking – Preferred Prime Minister First Ranked Choice
(Ending July 11, 2025, n=1,047)

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.



Party Power Index Tracking – Liberals

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

Contact: Nik Nanos

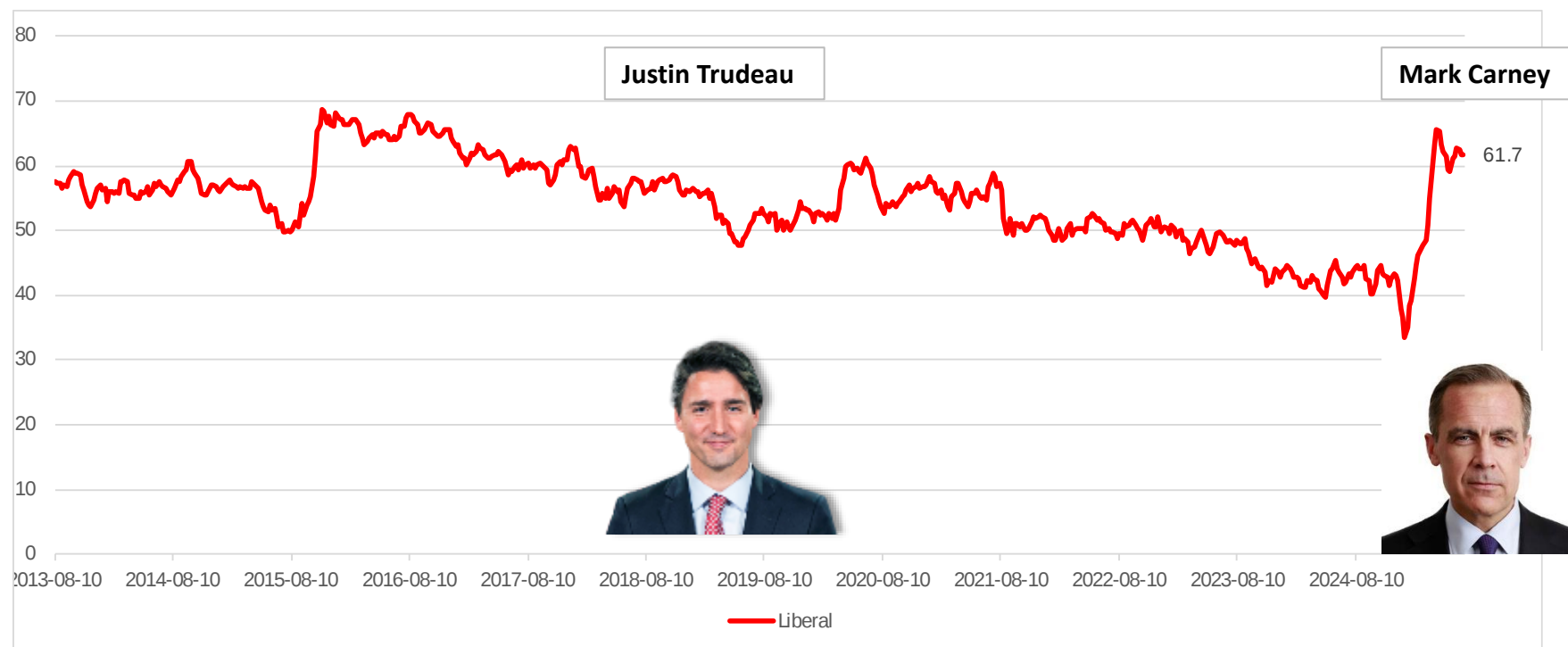
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Liberal



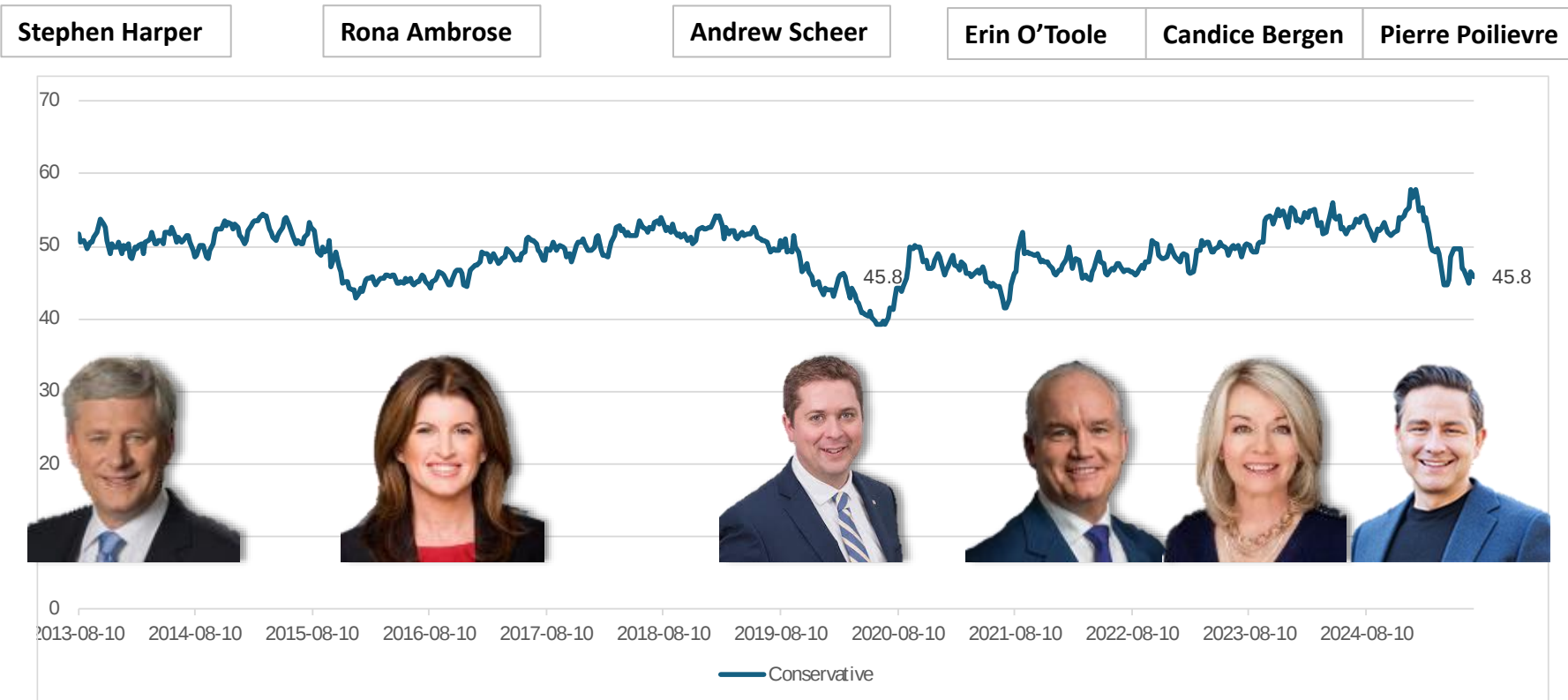
Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Party Power Index Tracking – Conservatives

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

Contact: Nik Nanos
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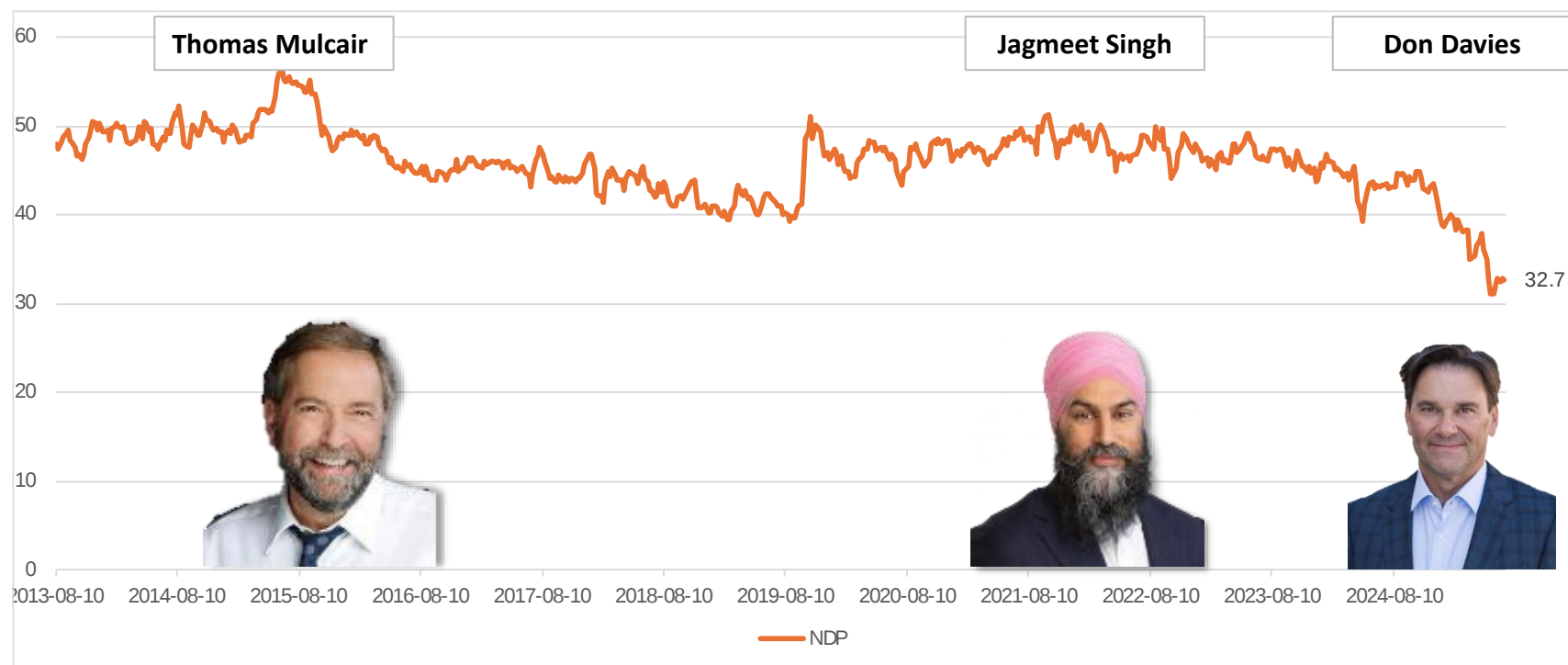
Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Party Power Index Tracking – NDP

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

Contact: Nik Nanos
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Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.



Party Power Index Tracking – Bloc

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

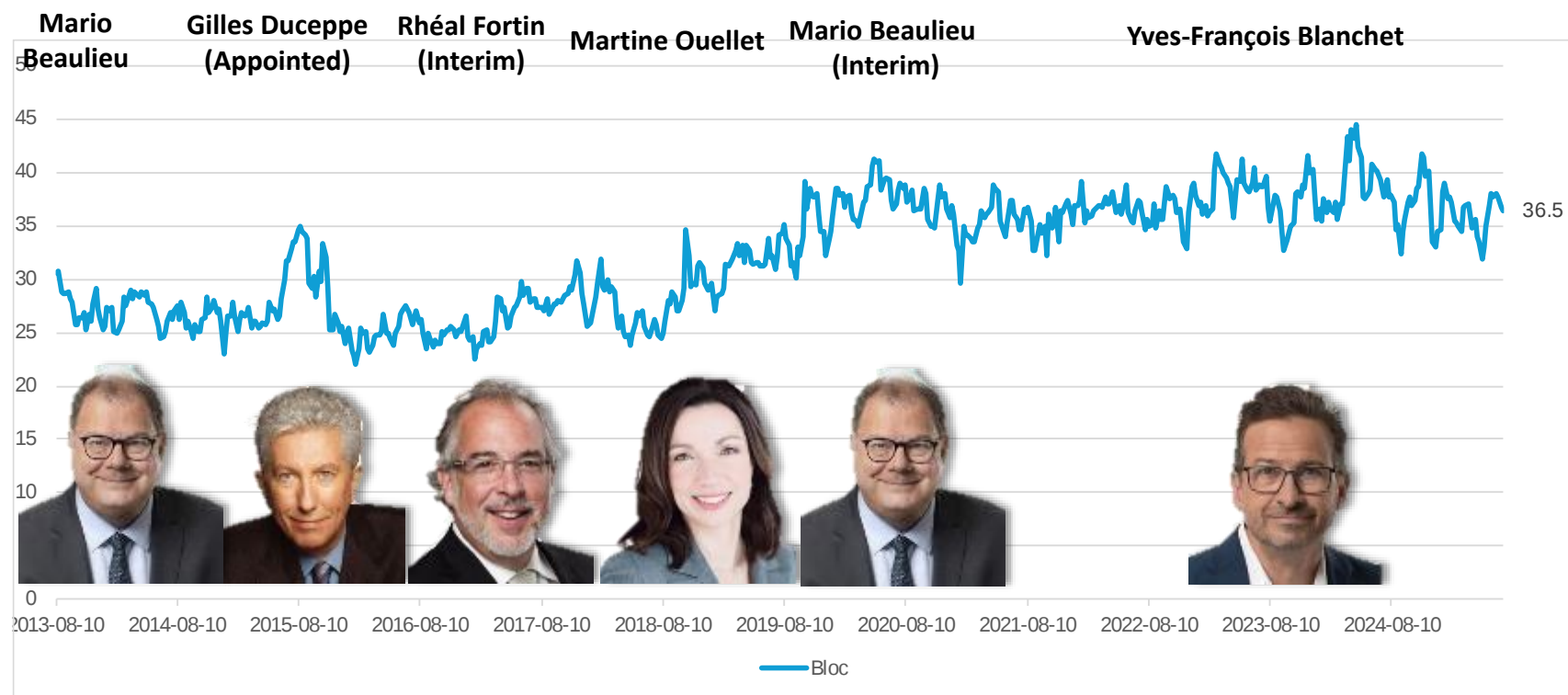
Contact: Nik Nanos

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Washington DC: (202) 697-9924

nik@nanos.co

Subscribe to the Nanos data portals to get access to detailed demographic and regional breakdowns.



Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.

Party Power Index Tracking – Green Party

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

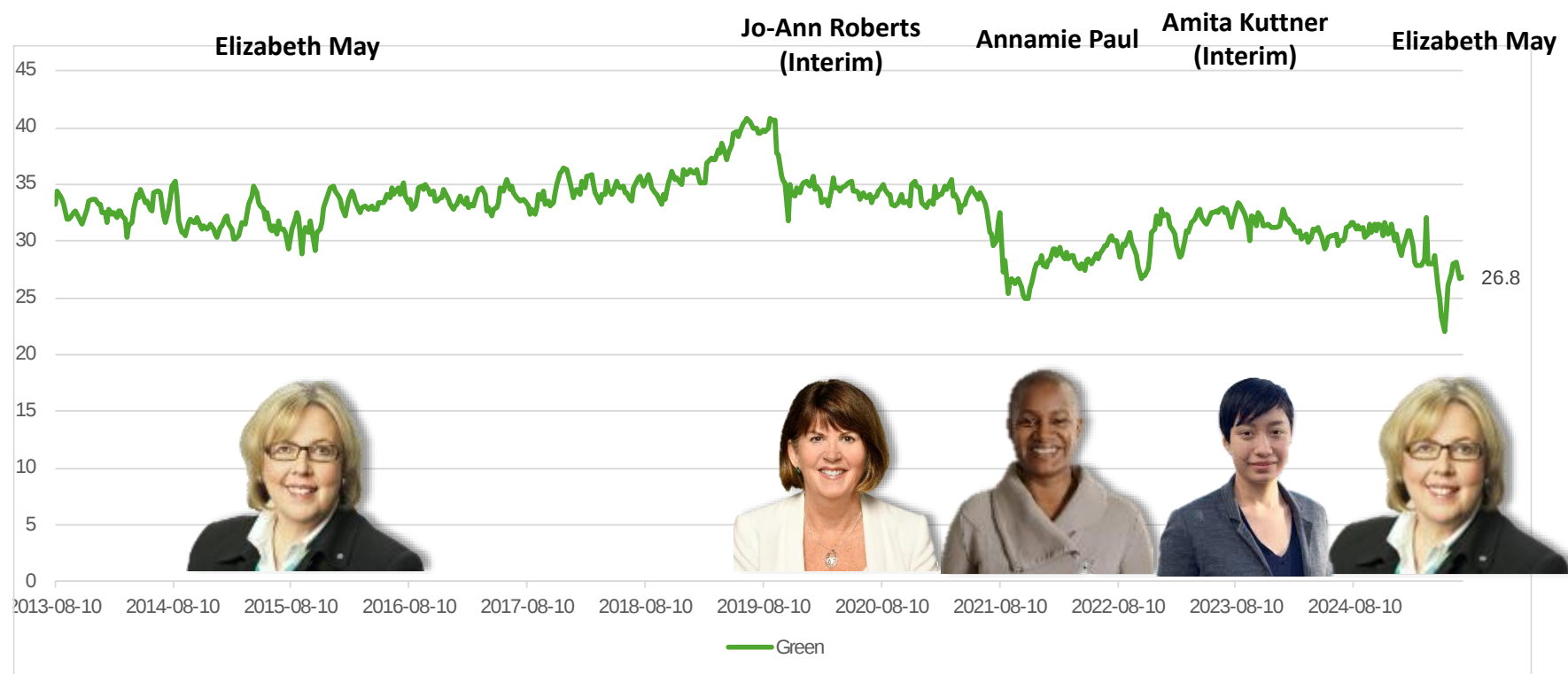
Contact: Nik Nanos

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Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.



Party Power Index Tracking – People's Party

The Nanos Party Power Index Tracking for Canada is based on a composite of the following public opinion measures: the national ballot, which party individuals would consider voting for, the top two choices for Prime Minister, and whether each party leader has good leadership qualities.

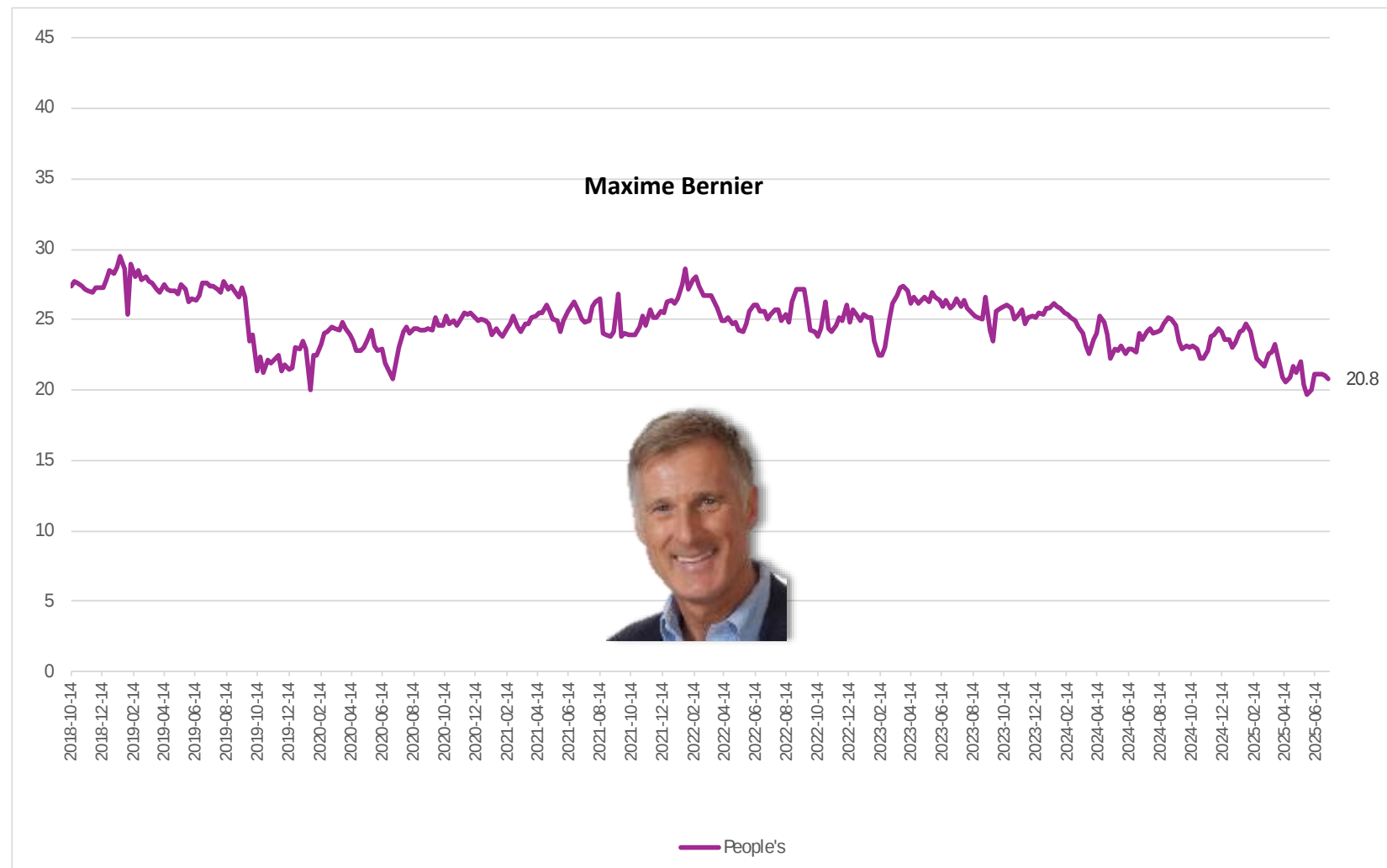
Contact: Nik Nanos

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Source: Nanos Research, RDD dual frame (land- and cell-lines) telephone survey, weekly tracking ending July 11, 2025, n=1,047, accurate 3.0 percentage points plus or minus, 19 times out of 20.



The Weekly Nanos Tracking is produced by the Nanos Research Corporation, headquartered in Canada, which operates in Canada and the United States. The data is based on random interviews with 1,047 Canadian consumers (recruited by RDD land- and cell-line sample), using a four-week rolling average of 250 respondents each week, 18 years of age and over. The random sample of 1,047 respondents may be weighted using the latest census information for Canada. The interviews are compiled into a four-week rolling average of 1,047 interviews where each week, the oldest group of 250 interviews is dropped and a new group of 250 interviews is added.

A random survey of 1,047 respondents in Canada is accurate 3.0 percentage points, plus or minus, 19 times out of 20. This report is based on the four waves of tracking ending July 11, 2025.

Since voters are not actually able to make a choice between elections, it is interesting to think about party strength and support more broadly. The Nanos Party Power Index fills this need by incorporating more information than just current vote preference.

The Nanos Party Power Index is a weekly composite measurement of federal party brands based on four questions about the federal parties and their leadership. The questions include:

- a ballot question that captures the 1st and 2nd vote preferences;
- a measure of whether the respondent would consider voting for the party;
- the 1st and 2nd preferences for Prime Minister of the current federal leaders; and,
- whether the respondent believes each current leader has the quality to be a good leader.

The views of 1,047 respondents are compiled into a diffusion brand index for each party that goes from 0 to 100, where 0 means that the party has no brand strength and 100 means it has maximum brand strength. A score above 50 is an indication of brand strength for the party and its leader at this time. The important factors in this weekly tracking include the direction of the brand strength or weakness and also the brand strength of one federal party relative to another.

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



Le suivi hebdomadaire de Nanos est produit par Nanos Research Corporation. Les données sont fondées sur des entrevues aléatoires avec 1 047 consommateurs canadiens (recrutés au téléphone à l'aide de l'échantillonnage à deux trames (terrestre et cellulaire) avec des agents en direct, utilisant une moyenne mobile de quatre semaines avec 250 répondants chaque semaine, âgés de 18 ans et plus. L'échantillon aléatoire de 1 047 répondants peut être pondéré selon l'âge et le sexe en utilisant les dernières données du recensement pour le Canada. Les entrevues sont compilées en une moyenne mobile de 1 000 entrevues sur quatre semaines, où chaque semaine, le groupe de 250 Canadiens le plus anciennement interrogé est abandonné et un nouveau groupe de 250 entrevues est ajouté.

Un sondage aléatoire auprès de 1 047 Canadiens est exact à $\pm 3,0$ points de pourcentage, 19 fois sur 20. Les données présentées dans ce rapport sont basées sur la période de suivi se terminant le 11 juillet 2025.

Comme les électeurs ne sont pas en mesure de faire un choix entre les élections il est intéressant de penser à la force du parti et à son soutien à un niveau plus large. Le suivi fédéral de Nanos répond à ce besoin en incorporant plus d'informations sur les préférences politiques, au-delà de la préférence actuelle de vote.

Le suivi fédéral de Nanos est une mesure composite hebdomadaire des marques des partis fédéraux fondée sur quatre questions concernant les partis fédéraux et leur leadership. Les questions comprennent:

- une question de scrutin qui capture les préférences de premier et de second vote;
- une mesure permettant de savoir si le répondant envisagerait de voter pour un parti donné;
- la 1ère et 2ème préférence pour Premier ministre parmi les dirigeants fédéraux actuels; et,
- si le répondant croit que chaque leader actuel possède les qualités d'un bon leader.

Les opinions de 1 047 répondants sont compilées dans un indice de marque de diffusion pour chaque parti qui va de 0 à 100, où 0 signifie que le parti n'a pas de force de marque et 100 signifie qu'il a la force de marque maximale. Un score supérieur à 50 est une indication de force de marque pour ce parti et son leadership en ce moment. Les facteurs importants dans ce suivi hebdomadaire incluent la direction de la force ou de la faiblesse de marque ainsi que la force de marque d'un parti fédéral par rapport à un autre.



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 disclosure.
Population and Final Sample Size	1,047 Randomly selected individuals, four week rolling average of 250 interviews a week.	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.
Margin of Error	±3.0 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line or internet could not participate.
Mode of Survey	Recruited by RDD dual frame (land- and cell-lines) telephone survey.	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.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	Six percent, consistent with industry norms.
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.	Question Order	Question order in the preceding report was asked in the following order – unprompted issue of concern, party consideration, unprompted vote preferences, preferred Prime Minister and qualities of a good political leader.
Demographics (Other)	Age, gender, education, income	Question Content	This was module one of a weekly tracking survey.
Fieldwork/Validation	Live interviews with live supervision to validate work.	Question Wording	The wording of questions is as presented in the report with a randomization of the political leaders for the question involving leader qualities.
Number of Calls	Maximum of five call backs.	Research/Data Collection Supplier	Nanos Research
Time of Calls	Local time 5:00-9:00 pm, on weekends 12:00- 6:00 pm	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.
Field Dates	Four-week period July 11, 2025	Data Tables	By region age and gender
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/		

Élément	Description	Élément	Description
Organisation qui a commandé la recherche	Nanos Research	Pondération des données	Les résultats ont été pondérés selon l'âge et le sexe en utilisant les données du dernier recensement (2021) et l'échantillon est stratifié géographiquement pour être représentatif du Canada. Voir les tableaux pour la divulgation complète de la pondération.
Taille finale de l'échantillon	1 047 répondants choisis au hasard, moyenne mobile de quatre semaines avec 250 répondants chaque semaine.	Présélection	La présélection garantit que les répondants potentiels ne travaillaient pas dans le secteur des études de marché, dans le secteur de la publicité, dans les médias ou pour un parti politique avant l'administration de l'enquête pour assurer l'intégrité des données.
Marge d'erreur	±3,0 points de pourcentage, 19 fois sur 20.	Groupes démographiques exclus	Les personnes de moins de 18 ans; les individus sans accès à lignes de téléphone n'étaient pas admissibles pour participer.
Type d'enquête	Enquête téléphonique (lignes téléphoniques terrestres et cellulaires) par génération aléatoire de numéros de téléphone (GANT).	Stratification	Par âge et sexe en utilisant les données du dernier recensement (2016) et l'échantillon est stratifié géographiquement pour être représentatif du Canada. Les régions plus petites comme le Canada Atlantique furent suréchantillonnées pour assurer un échantillon régional minimum.
Méthode d'échantillonnage	L'échantillon recruté à par des lignes terrestres et cellulaires à travers le Canada par l'entremise de génération aléatoire de numéros de téléphone (GANT).	Taux de réponse estimé	Six pourcent, en conformité avec les normes de l'industrie.
Données démographiques (captées)	Canada Atlantique, Québec, Ontario, Prairies, Colombie-Britannique; hommes et femmes; 18 ans et plus. Le code postal à six chiffres fut utilisé pour valider l'endroit géographique.	Ordre des questions	Les questions de ce rapport ont été posées dans l'ordre suivant : enjeu, considération de vote, les préférences de vote spontanées, le Premier ministre préféré et les qualités d'un bon leader politique.
Données démographiques (autres)	Âge, sexe, éducation, revenu	Contenu des questions	Ceci fait partie d'une enquête de suivi hebdomadaire et est le premier module.
Travail sur le terrain/validation	Entrevues en direct administrées par des agents et sous supervision du travail.	Formulation des questions	La formulation des questions est telle que présentée dans le rapport, les leaders politiques ont été affichés de manière aléatoire pour la question impliquant les qualités d'un bon leader.
Nombre d'appels	Maximum de cinq rappels.	Compagnie de recherche	Nanos Research
Heure des appels	Heure locale 17h à 21h, fins de semaine 12h à 18h.	Contactez	Contactez Nanos Research pour de plus amples renseignements ou si vous avez des questions ou des préoccupations. http://www.nanos.co Téléphone : (613) 234-4666 x 237 Courriel : info@nanosresearch.com.
Dates du travail sur le terrain	Période de quatre semaines terminant le 11 juillet 2025.		
Langue de l'enquête	L'enquête a été menée en français et en anglais.		
Standards	Ce rapport dépasse les normes établies par CRIC, ESOMAR et AAPOR.		

QUESTION AND WEIGHTING

The results are weighted by region, age and gender using the latest Census information (2021) and the sample is geographically stratified to ensure a distribution across all regions of Canada. To see examples this week's weighting details, please find page 2 of the tabulations attached at the end of the report. Questions in the political module are asked in the following order:

Question 1 — What is your most important NATIONAL issue of concern? [OPEN]
[UNPROMPTED]

For each of the following political parties, please tell me if you would consider or not consider voting for it [RANDOMIZE ORDER]

Question 2 — Liberal Party of Canada

Question 3 — Conservative Party of Canada

Question 4 — New Democratic Party of Canada

Question 5 — Bloc Québécois [QC ONLY]

Question 6 — Green Party of Canada

Question 7 — People's Party of Canada

Question 8 — For those parties you would consider voting for federally, could you please rank your top two current local preference?*[UNPROMPTED]

Question 9 — Of the current federal political party leaders, could you please rank your top two current local preferences for Prime Minister? [RANDOMIZE PARTY LEADERS]

Mark Carney

Pierre Poilievre

Don Davies

Yves-François Blanchet [QC ONLY]

Elizabeth May

Maxime Bernier

Unsure

For each of the following federal political party leaders, do you think they have or do not have the qualities to be a good political leader? [RANDOMIZE PARTY LEADERS]

Question 10 — Mark Carney

Question 11 — Pierre Poilievre

Question 12 — Don Davies

Question 13 — Yves-François Blanchet [QC ONLY]

Question 14 — Elizabeth May

Question 15 — Maxime Bernier



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nanos dimap analytika



This international joint venture between [dimap](http://www.dimap.com) and [Nanos](http://www.nanos.co) 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

EthicStratēgies

Ethic Strategies was created by the founding partners of [PAA Advisory](http://www.paaadvisory.com) and the [Nanos Research Corporation](http://www.nanos.co), 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

Nanos Poll compared to 2021 Election Results

Party	Saturday 18 th & Sunday 19 th	Sunday 19 th Only ELECTION CALL	Election Results	Variance from ELXN CALL
 Conservative	32.0%	31.2%	33.7%	-2.5
 Libéral	31.5%	32.4%	32.6%	-0.2
 NDP	19.0%	17.5%	17.8%	-0.3
 BLOC Québécois	7.3%	7.5%	7.6%	-0.1
 PPC PEOPLE'S PARTY OF CANADA	5.1%	6.6%	4.9%	+1.7
 green PARTY OF CANADA	4.6%	4.5%	2.3%	+2.2
Other	0.5%	0.3%	1.1%	-0.8
Decided Voters	n=1,513	n=766		
Margin of Error 19 times out of 20	±2.5	±3.6		

Question: If a FEDERAL election were held today, could you please rank your top two current local voting preferences? [First ranked response] Source: CTV, Globe, Nanos nightly election tracking ending September 19th, 2021.

Margin of Error for Research

Factoring the margin of error for the national random sample administered by Nanos, Liberal support may be as high as 36.0% or as low as 28.8%. Likewise, support for the Conservatives may be as high as 34.8% or as low as 27.6%.

Key Takeaways

All of the Nanos estimates were within the reported margin of error for the election call.

Both the Sat/Sun sample and the Sunday only election call samples showed a tight race which manifested itself in the final result.

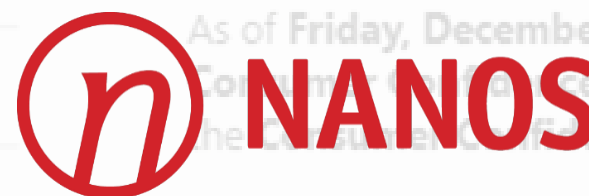
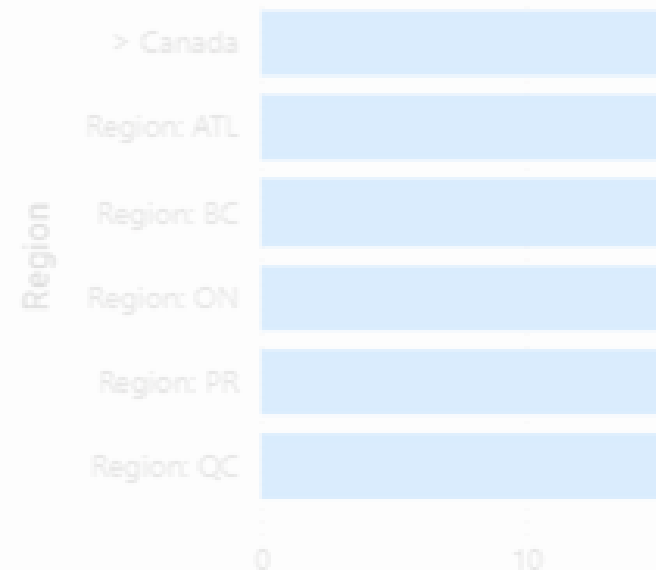
The total error for the six parties plus others is 7.8 for an average error of about 1.1 percent.

Learn more about the Nanos Data Portal service offering. Subscribe today to the Economic, Issue & Sentiment Tracking Portal or the Federal Political Tracking Portal.

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Consumer Confidence Index
Expectations Index
Pocketbook Index
Confidence Index
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