

# Understanding Voter Sentiments for The 2026 Municipal

How Economic Fear, Political  
and Societal Trends are  
Impacting Voter Behaviours

**Leger**

**Andrew Enns, Executive Vice-President**

April 29 – May 1, 2026



PRESENTED TO:



**LOWER MAINLAND**  
LOCAL GOVERNMENT ASSOCIATION

# Presentation **Outline**

**Leger**

**1** Introduction  
to Leger



**2** The Issue  
Environment



**3** US Relations



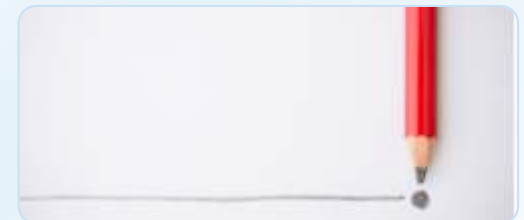
**4** National &  
Provincial Politics



**5** Municipal Politics



**6** AI Adoption



**7** Conclusions

# A little bit about Leger

8

offices in **Canada** coast to coast and the **USA**, and over

**300**

employees, including

**235**

consultants.

Last year, we conducted

**5,626,037**

online surveys and

**249,523**

telephone surveys.

LEO is the **largest proprietary online panel**, with over

**500,000**

members in North America.

- Most Accurate Polling Firm In Canada
- Largest and Best Panel in Canada
- 100+ Press Releases and Pollster Media Dominance
- One-stop Shop-Full Service
- Efficient Operational Structure

# Belief in Conspiracy Theories

Canada vs United States

**% BELIEVE Presented**

	Total CANADA 	DIFFERENTIAL Between Liberal & Conservatives 	Total USA 
Evidence of <b>alien contact</b> is being <b>hidden from the public</b>	39%	+8%	+7
<b>John F. Kennedy's</b> assassination was a <b>cover-up</b>	35%	+13%	+12
<b>COVID-19</b> was created as a <b>biological weapon</b> in a lab	35%	+9%	15
Scientists have found a <b>cure for cancer</b> , but <b>government &amp; pharmaceutical</b> companies <b>withhold it</b>	24%	+21%	+13
<b>Governments</b> are <b>hiding the truth</b> about the <b>harmfulness of vaccines</b> from the public	31%	+28%	+10
<b>Global warming &amp; climate change</b> are naturally occurring processes that are <b>not the result of human activity</b>	30%	+3%	+5
There is a <b>secretive global elite</b> working behind the scenes to <b>establish a single world government</b>	29%	+21%	+12
The <b>addition of fluoride</b> to city water supplies <b>causes cancer and other health problems</b>	21%	+16%	+12
The <b>9/11 attacks</b> were <b>planned by the government</b>	20%	+9%	+7
The <b>2020 US election</b> was <b>rigged and stolen</b> from Donald Trump	18%	+12%	+17
The <b>United States</b> runs <b>secret bioweapon laboratories</b> in <b>Ukraine</b>	17%	+5%	+7
The <b>visible streaks left by aircraft</b> in the sky are actually <b>chemicals intentionally sprayed</b> for various undisclosed purposes, <b>known as chemtrails</b>	16%	+9%	+11
The <b>lunar landings</b> are a <b>hoax</b>	14%	+6%	+5
Popular <b>politicians and celebrities</b> have been <b>cloned and replaced</b> by identical copies	9%	+1%	+9
The <b>earth is flat</b>	5%	-1%	+3



Q5Z. How much do you personally believe or disbelieve the following statements?

Base: All respondents

# Implications

#1

**Institutional trust is materially eroded.**

It signals a broad skepticism of authority—public and private—now Brand trust now operates in a low-confidence environment.

#2

**Facts alone are no longer persuasive.** Data competes with identity, ideology, and emotion. Communications strategies built solely on rational evidence are structurally disadvantaged.

#3

**Reputational risk can spread fast.** Conspiracy ecosystems accelerate misinformation and can scale globally and challenge PR containment

#4

**Employee culture is not immune.** Beliefs exist inside the workforce not just the market. Internal comm's, leadership credibility, and policy compliance (e.g., health, safety, DEI) are all impacted.

#5

**Authenticity is now a strategic asset.** Transparent leadership, consistent behavior, and values-based leadership are competitive differentiators.

# What is on the Minds of Canadians?



*“The **economic fears**, driven by uncertainty south of the border, compounded with persistent inflation and global conflicts that occasionally spill-over here at home and you have a recipe for a great deal of public pessimism ”*

# Most Important Issue Facing Canadians



(Ranked 1&2)

	FEB 2025 (n=1,548)	JUN 2025 (n=1,603)	SEP 2025 (n=2,452)	JAN 2026 (n=2,622)
Healthcare	41%	37%	35%	40%
Housing affordability/ accessibility	42%	42%	38%	38%
Inflation	38%	34%	32%	35%
Tariffs/Trump	0	32%	35%	31%
Immigration	23%	20%	23%	20%
Taxes	20%	17%	16%	16%
Poverty	17%	15%	13%	15%
Homelessness	19%	15%	15%	14%
Government debt	16%	12%	13%	14%
Climate change	16%	16%	16%	13%

Statistically significantly higher/lower than previous wave

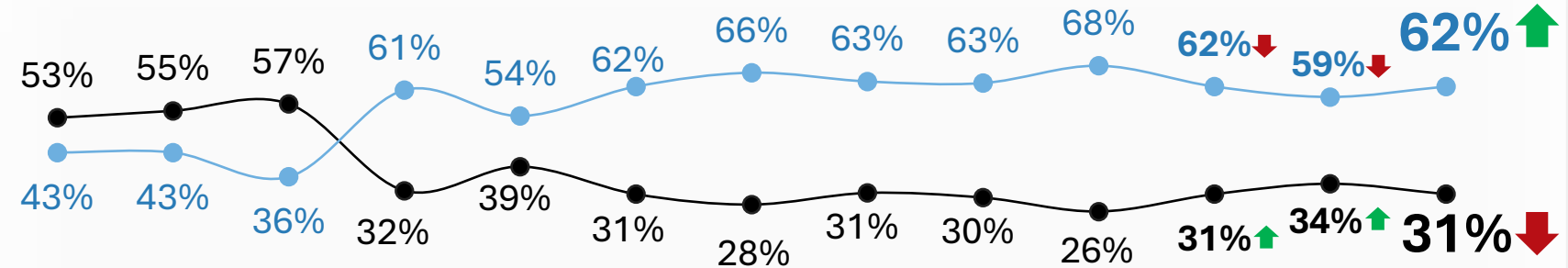
# Current Economic Perceptions

Economic confidence for the country and for households are at **all-time lows**.

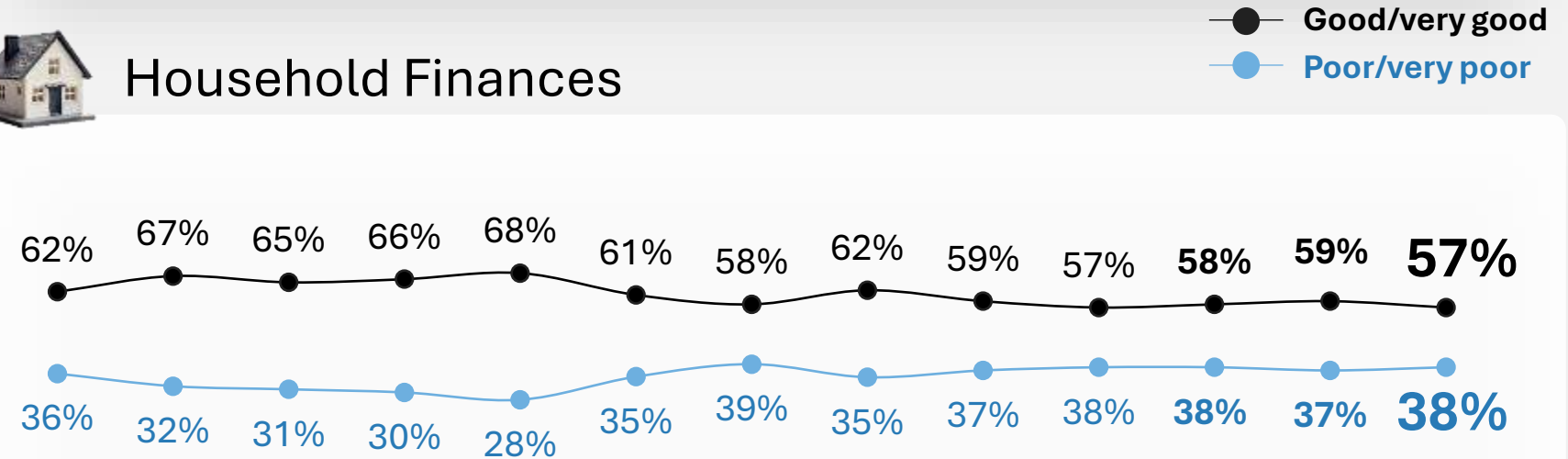
Leger Economic Confidence Study.  
Base: 2,622 Canadian adults aged 18+  
Q. How would you describe the economic conditions in Canada today? How would you describe your own household's finances today?



## Canada Economy



## Household Finances



Mar 2017    Jan 2019    Feb 2020    Feb 2021    Jan 2022    Jan 2023    Sep 2023    Jan 2024    Jul 2024    Jan 2025    Jun 2025    Sep 2025    **JAN 2026**

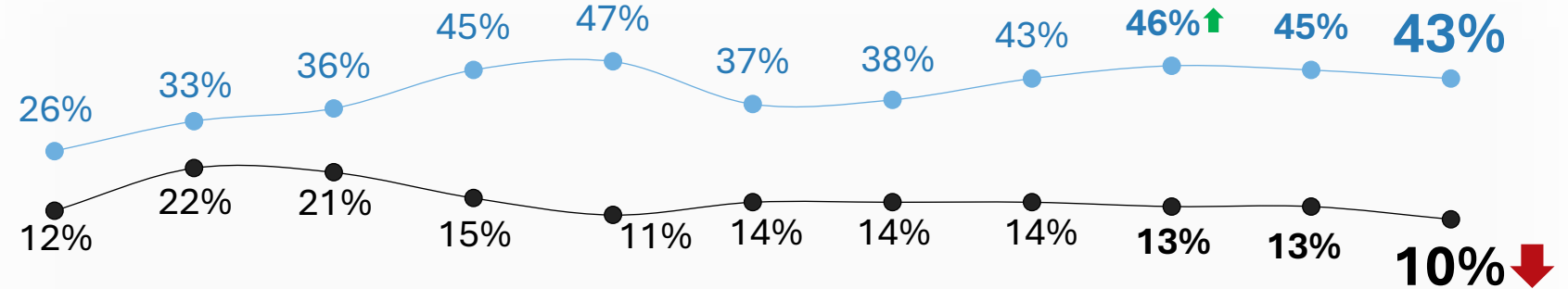
# Future Economic Confidence

Future economic confidence shows **a bleak outlook**

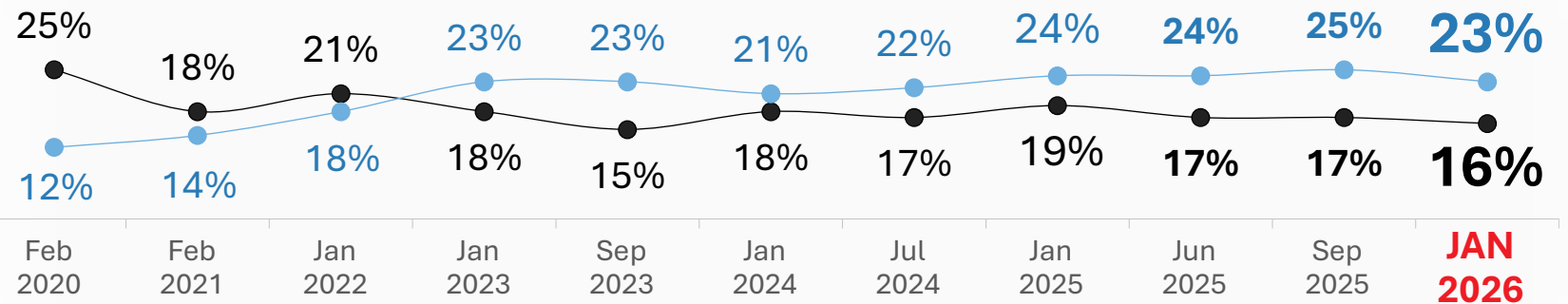
- **46%** are living paycheque to paycheque
- **50%** believe we are in a recession



## Canada Economy



## Household Finances



● Improve  
● Decline

Economic Confidence Study. Base: 2,622 Canadian adults aged 18+.

Q. Over the next six months, do you expect the Canadian economy to improve, remain the same, or decline?

Q. Over the next six months, do you expect your own household's finances to improve, remain the same, or decline?

# Patriotism on the Rise, and Shopping Patterns Impacted

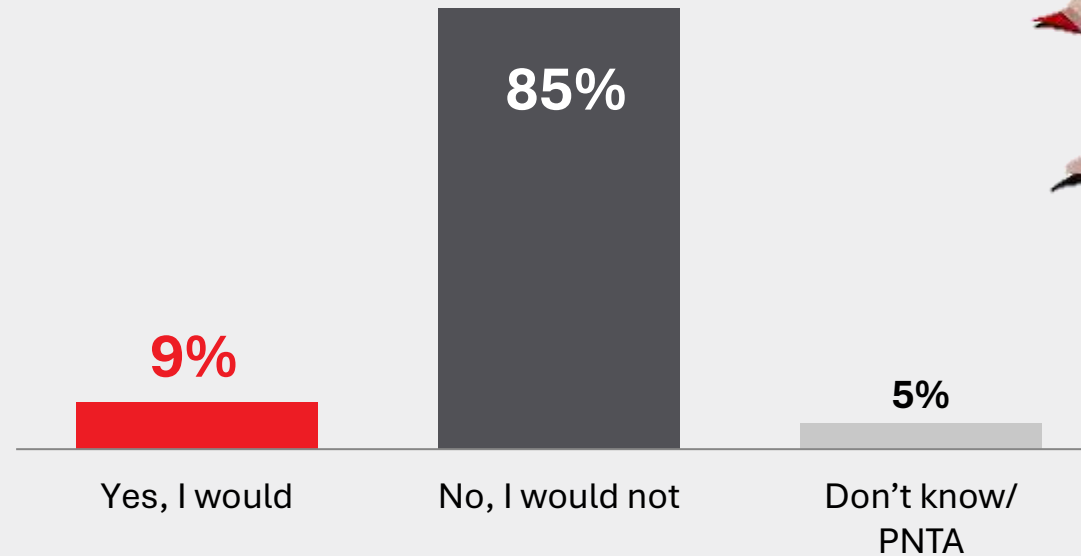


*“The announcement of **Trump/Tariffs** and insinuations of the **51st state enraged** Canadians, changed our political landscape and unleashed a deluge of consumer purchase patterns & choices that will **continue** to have a **dramatic impact** on businesses on both sides.”*

# On Canada Becoming the 51<sup>st</sup> State...



Interest in becoming **the 51<sup>st</sup> state**



Q. Would you or would you not like Canada to become the 51st state of the United States?

Base: All respondents (n=1,599)

# Overall Impression of President Donald Trump



Total  
**CANADA**

Total  
**USA**

	Total <b>CANADA</b>	Total <b>USA</b>
<i>Weighted n=</i>	<b>1,534</b>	<b>1,006</b>
<i>Unweighted n=</i>	<b>1,534</b>	<b>1,006</b>
Favourable*	<b>10%</b>	<b>36%</b>
Unfavourable	<b>81%</b>	<b>53%</b>

# Perception of the United States/Canada as an **Ally**, **Neutral**, or **Enemy**



Total  
**CANADA**



Total  
**USA**

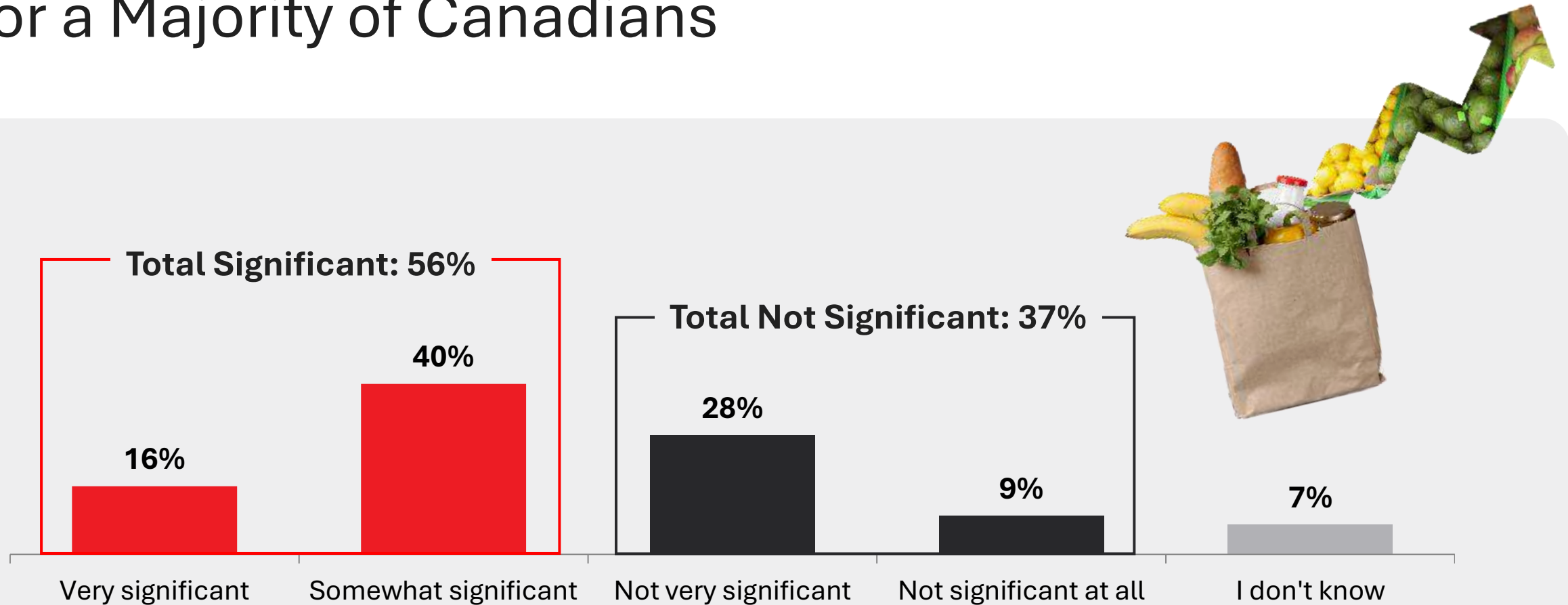
	<i>Weighted n=</i> <i>Unweighted n=</i>	<b>1,534</b> <b>1,534</b>	<b>1,007</b> <b>1,007</b>
An <b>ally</b>		<b>31%</b>	<b>56%</b>
A neutral country		25%	29%
An <b>enemy</b> country		<b>27%</b>	<b>1%</b>
DK / Refusal		16%	14%

**China: 36%**  
**Russia: 60%**

Base: All respondents

Q. Do you consider the United States/**Canada** to be an ally, a neutral country, or an enemy country?

# Tariffs are Hitting Home for a Majority of Canadians



Q. Still thinking about the tariffs imposed by the US, how significant has the impact been on your household?  
Please include your financial situation along with actions or changes you have taken personally in response to the situation with the US.

Base: All respondents (n=1,519) (December 2025)

# Examples of Actual Spending Changes:



U.S. fresh orange juice import value dropped from about **US\$12 million in June 2024** to **~US\$5.78 million in June 2025**.

In May and **June 2025**, wine exports from the USA to Canada were down **90% compared to June 2024**.



Sales of U.S. spirits in Canada dropped **66.3%** between early March and end of April in 2025, while overall spirits sales fell **~12.8%**.



In **July 2025**, Canadian-resident return trips *by air* from the United States were down **25.8%** compared with July 2024.



Forward bookings between Canada and the U.S. are reported to be **down by ~70-75%** compared to the same period last year.

320,000 seats across Canada-U.S. routes have been removed in schedule filings (for flights through to October) in response to lower demand



The numbers on California produce are not yet available



# Changing Politics at the Local and National Level

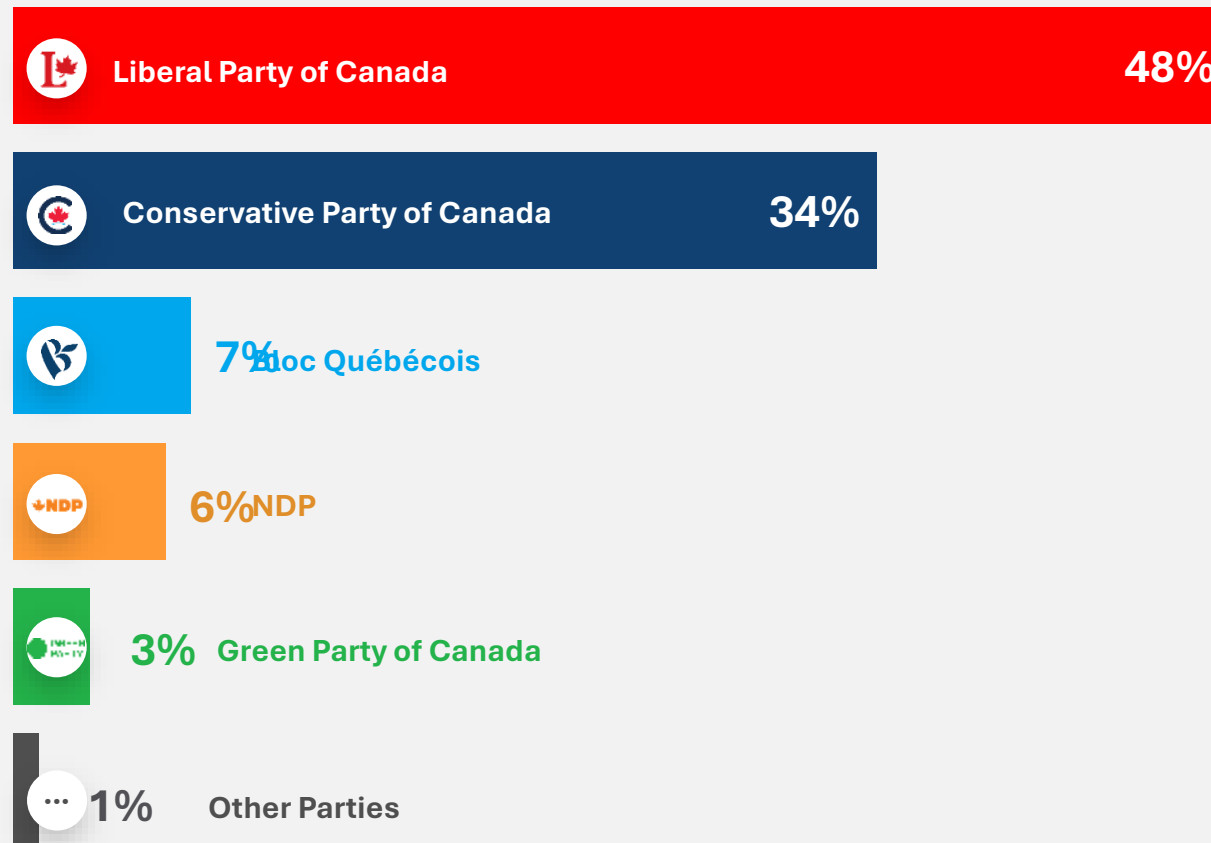


*“**Carney's performance** this far has **been steady**—topped by his speech in Davos. But changes are occurring at the provincial level as the Conservatives elect a new leader and Eby’s trending lower”*

# Voting Intentions - Federal Elections (1/2)

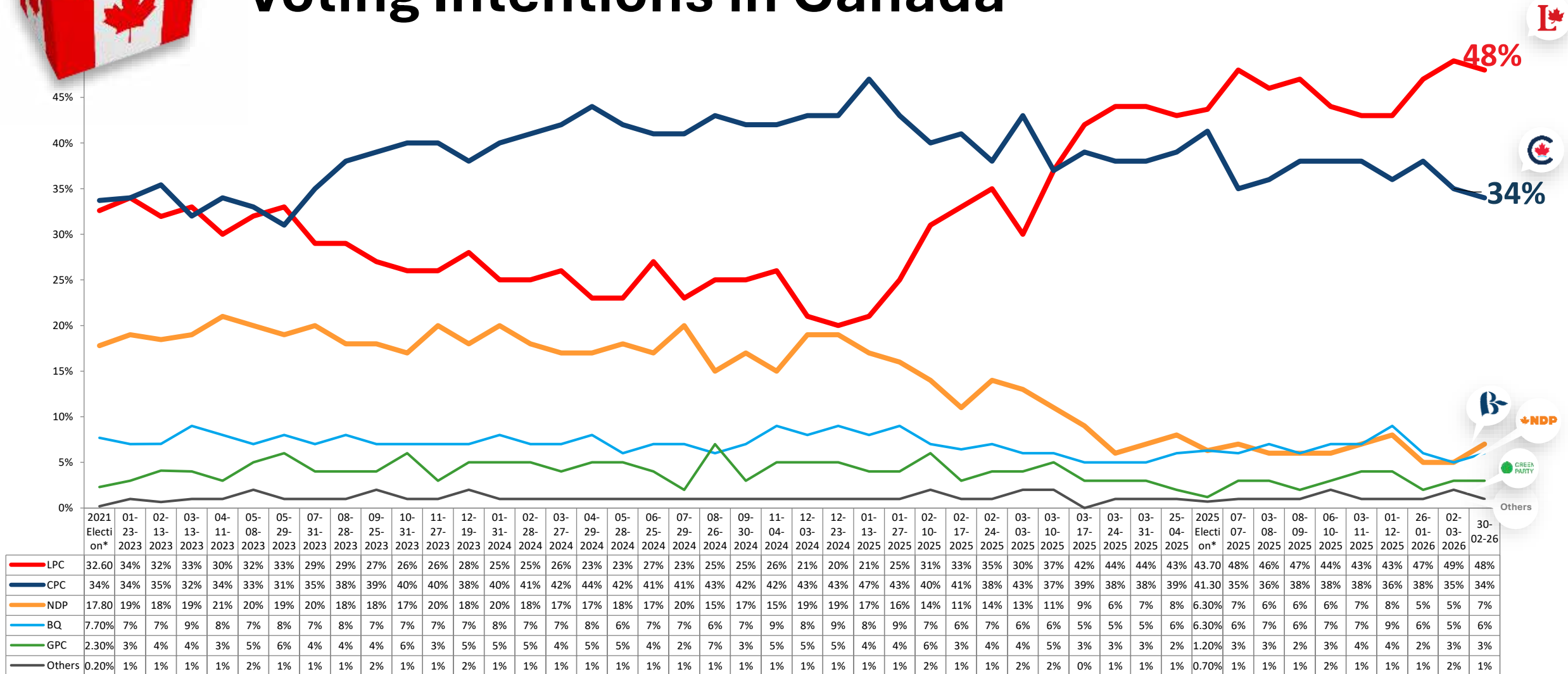
**Q1.** If federal elections were held today, for which political party would you be most likely to vote? Would it be for...?

Base: Decided voters (n=1,381) except for the Bloc Québécois, Quebecers only



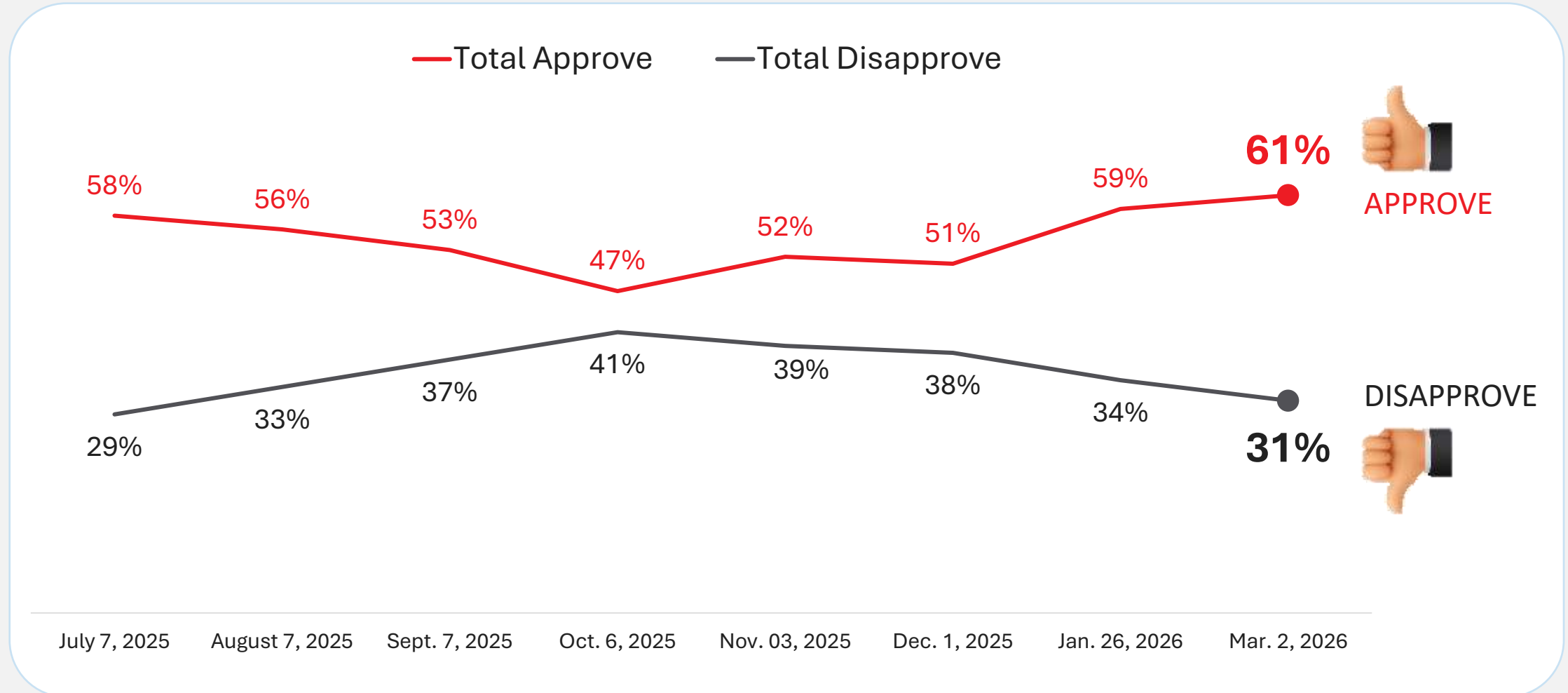


# Evolution of Voting Intentions in Canada



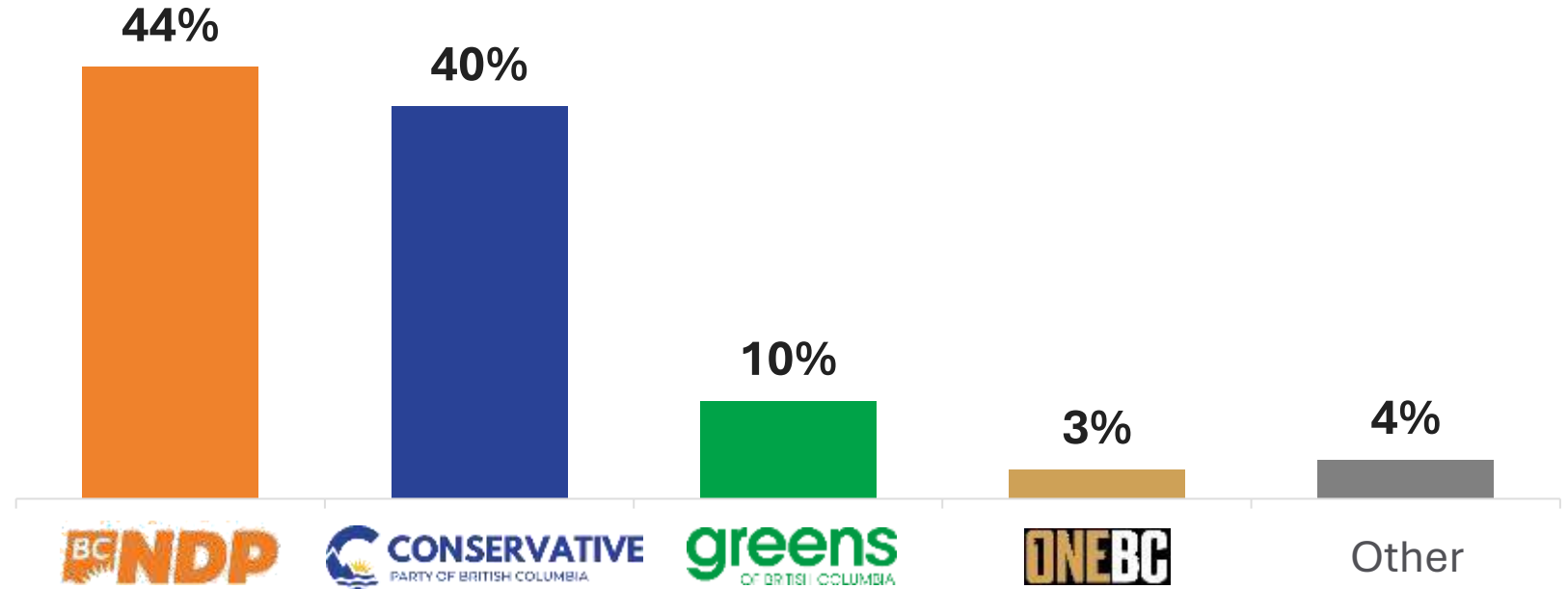
\*Official results from Elections Canada

# Approval of Prime Minister Carney's Performance to Date – Trended



# Provincial Voting Intentions

(Among Decided Voters –  
April 6, 2026)

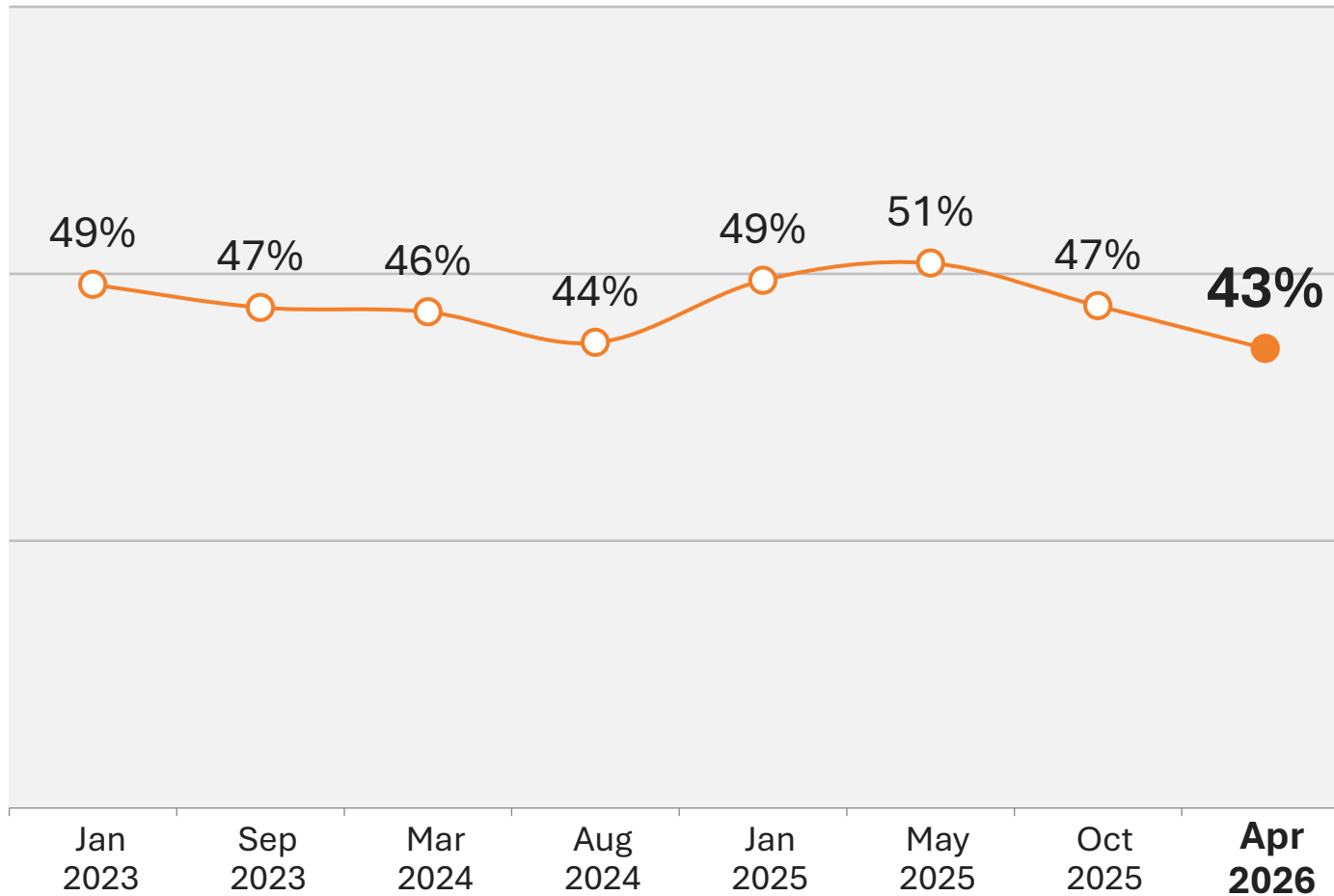


	Total	GENDER		AGE			REGION			FEDERAL VOTE		
		Men	Women	18-34	35-54	55+	Metro Van	Van Island	Rest of BC	Liberal	CPC	NDP
BC NDP	44%	41%	46%	43%	42%	45%	49%	40%	35%	76%	5%	88%
Conservative Party of BC	40%	43%	37%	36%	47%	37%	38%	36%	47%	12%	89%	1%
Green Party	10%	8%	11%	13%	7%	9%	8%	14%	10%	7%	2%	10%
OneBC	3%	5%	1%	5%	1%	4%	3%	1%	4%	2%	4%	1%
Other	4%	3%	4%	3%	3%	5%	2%	9%	4%	4%	<1%	-

% Statistically significantly higher than total

% Statistically significantly lower than total

# Eby's Current Leader Approval Rating is Dropping



David Eby

## Approval Ratings on Key Files Is Dropping

Indigenous Issues	34%
Crown Corps	30%
Taxes	22%
Deficits	8%
Homelessness	14%

# BC Conservative Leadership Race...

## Favourability among British Columbians

% Very / Somewhat Favourable	PROVINCIAL VOTE			
	NDP	Conservative	Green	OneBC
<b>Caroline Elliott</b>	8%	22%	13%	14%
<b>Kerry Lynne Findlay</b>	10%	22%	18%	19%
<b>Peter Milobar</b>	10%	22%	18%	23%
<b>Iain Black</b>	8%	19%	15%	1%
<b>Yuri Fulmer</b>	6%	13%	14%	11%
<b>*Warran Hamm</b>	7%	13%	14%	11

## Impact on Voting Conservative in next election

% Much / Somewhat more likely to vote for	PROVINCIAL VOTE			
	NDP	Conservative	Green	OneBC
<b>Caroline Elliott</b>	7%	19%	9%	17%
<b>Kerry Lynne Findlay</b>	6%	19%	13%	22%
<b>Peter Milobar</b>	7%	17%	9%	23%
<b>Iain Black</b>	7%	17%	9%	4%
<b>Yuri Fulmer</b>	4%	13%	16%	10%
<b>*Warran Hamm</b>	5%	10%	5%	-

\*Was in the race at the time of the survey (Early April 2026)

% Statistically significantly higher than total  
% Statistically significantly lower than total

# Municipal Voters

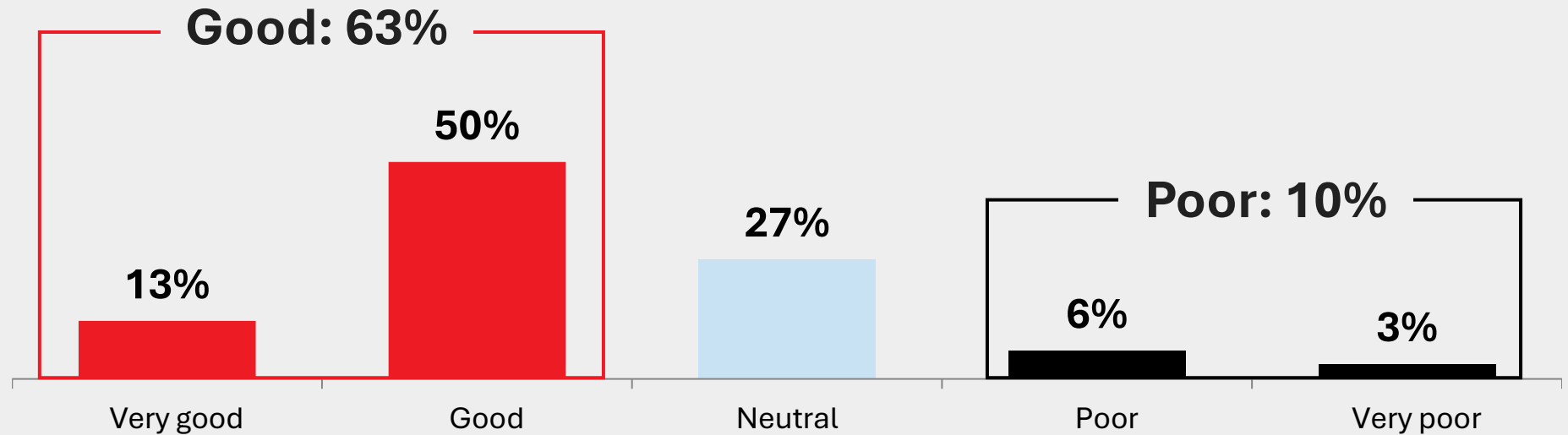
*“Municipal voters are stressed and don’t feel they are getting ahead—a volatile mix for incumbents”*

April 2026



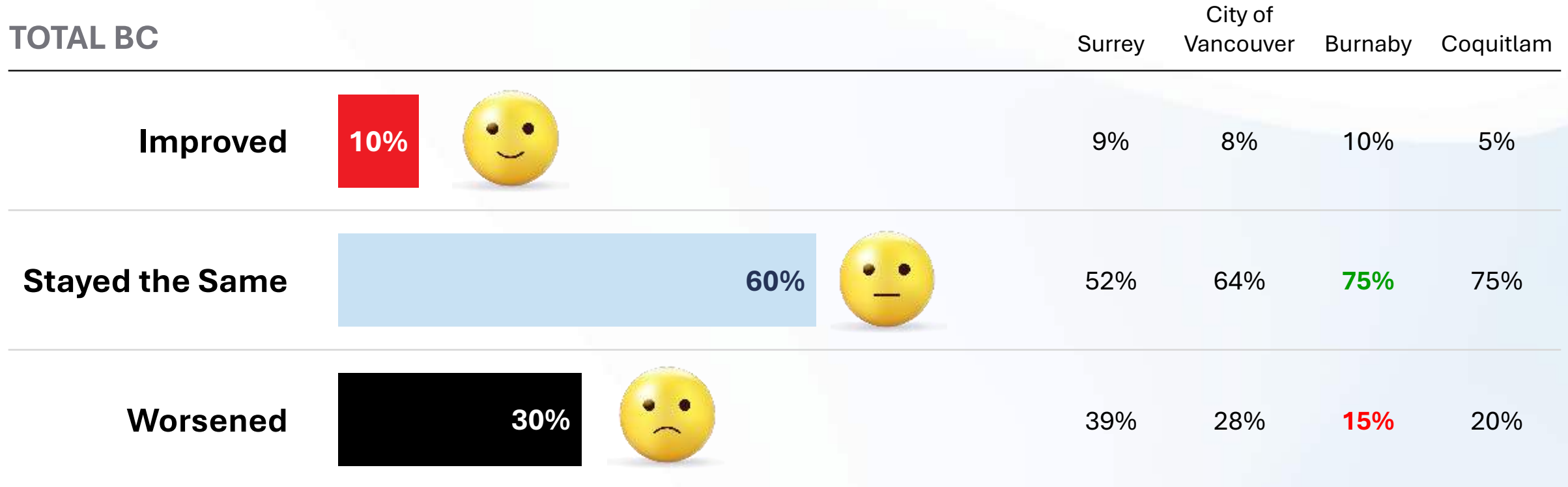
# Quality of Life

TOTAL BC



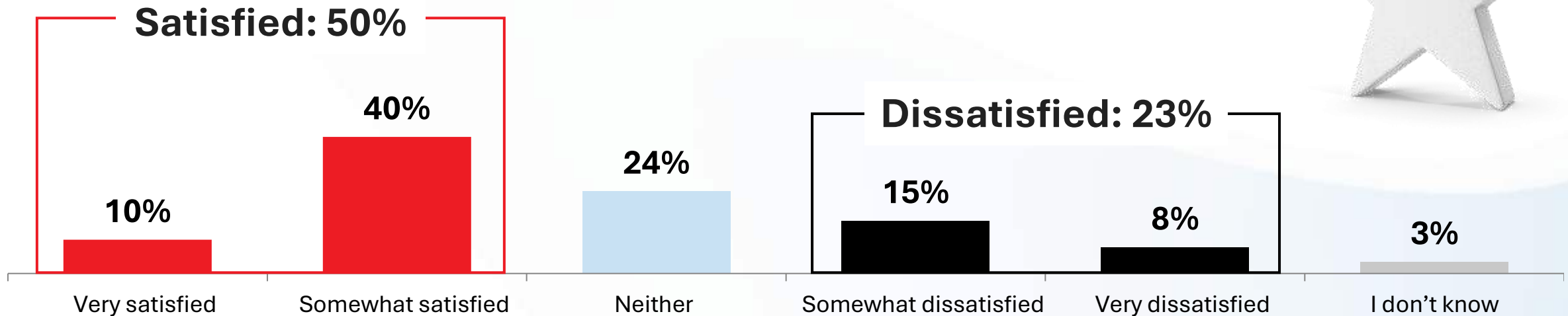
	Surrey	City of Vancouver	Burnaby	Coquitlam
<b>TOTAL GOOD</b>	<b>59%</b>	<b>52%</b>	<b>66%</b>	<b>66%</b>
Very good	8%	13%	5%	7%
Good	51%	39%	61%	59%
<b>TOTAL POOR</b>	<b>8%</b>	<b>14%</b>	<b>12%</b>	<b>2%</b>
Poor	4%	10%	9%	2%
Very Poor	4%	3%	3%	-
Neutral	34%	34%	22%	32%

# How Quality of Life has Changed



# Satisfaction with Overall Quality of Services and Programs

TOTAL BC



	Surrey	City of Vancouver	Burnaby	Coquitlam
<b>TOTAL SATISFIED</b>	<b>52%</b>	<b>49%</b>	<b>49%</b>	<b>52%</b>
Very satisfied	11%	5%	11%	2%
Somewhat satisfied	41%	43%	38%	50%
<b>TOTAL DISSATISFIED</b>	<b>22%</b>	<b>24%</b>	<b>13%</b>	<b>10%</b>
Somewhat dissatisfied	13%	13%	10%	8%
Very dissatisfied	10%	11%	3%	3%
Neither	20%	25%	34%	31%
Don't know	6%	3%	3%	6%

Q. How satisfied are you with the OVERALL quality of services and programs provided by your municipality?

# Value from Tax Dollars

51%

Poor/Fair Value

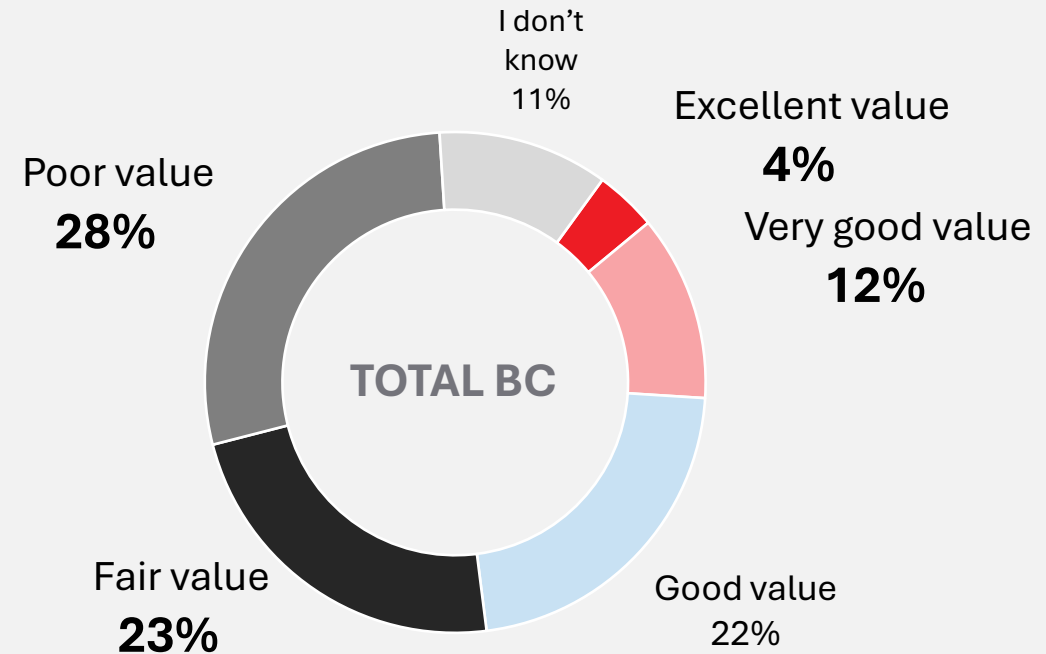
16%

Excellent/very good

Q. Please rate the value you feel you receive from your municipal property tax dollars.

% Statistically significantly higher than total

% Statistically significantly lower than total

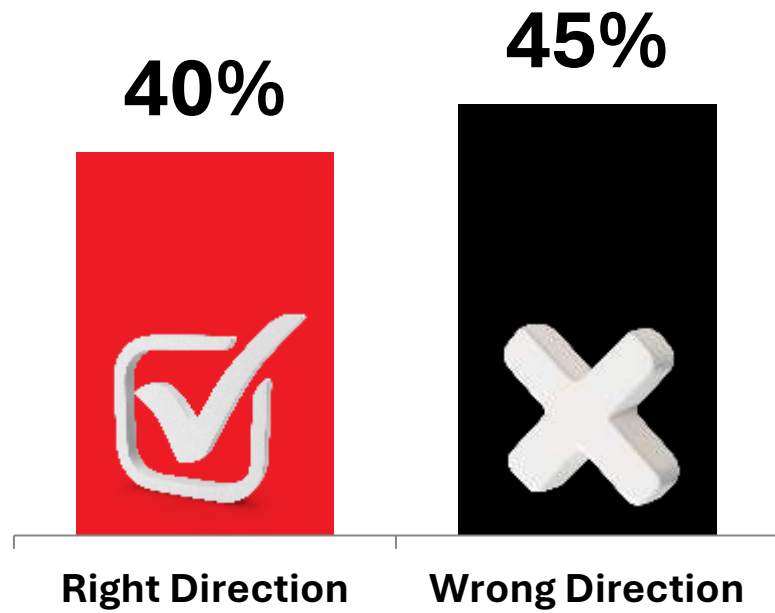


	Surrey	City of Vancouver	Burnaby	Coquitlam
<b>TOTAL EXCELLENT/VERY GOOD</b>	<b>17%</b>	<b>19%</b>	<b>9%</b>	<b>9%</b>
Excellent value	1%	4%	-	2%
Very good value	16%	15%	9%	6%
<b>TOTAL FAIR/POOR</b>	<b>43%</b>	<b>52%</b>	<b>47%</b>	<b>46%</b>
Fair value	23%	25%	18%	25%
Poor value	20%	27%	29%	21%
Good value	18%	23%	36%	37%
Don't know	22%	6%	8%	8%

# Are We Going in the Right Direction?

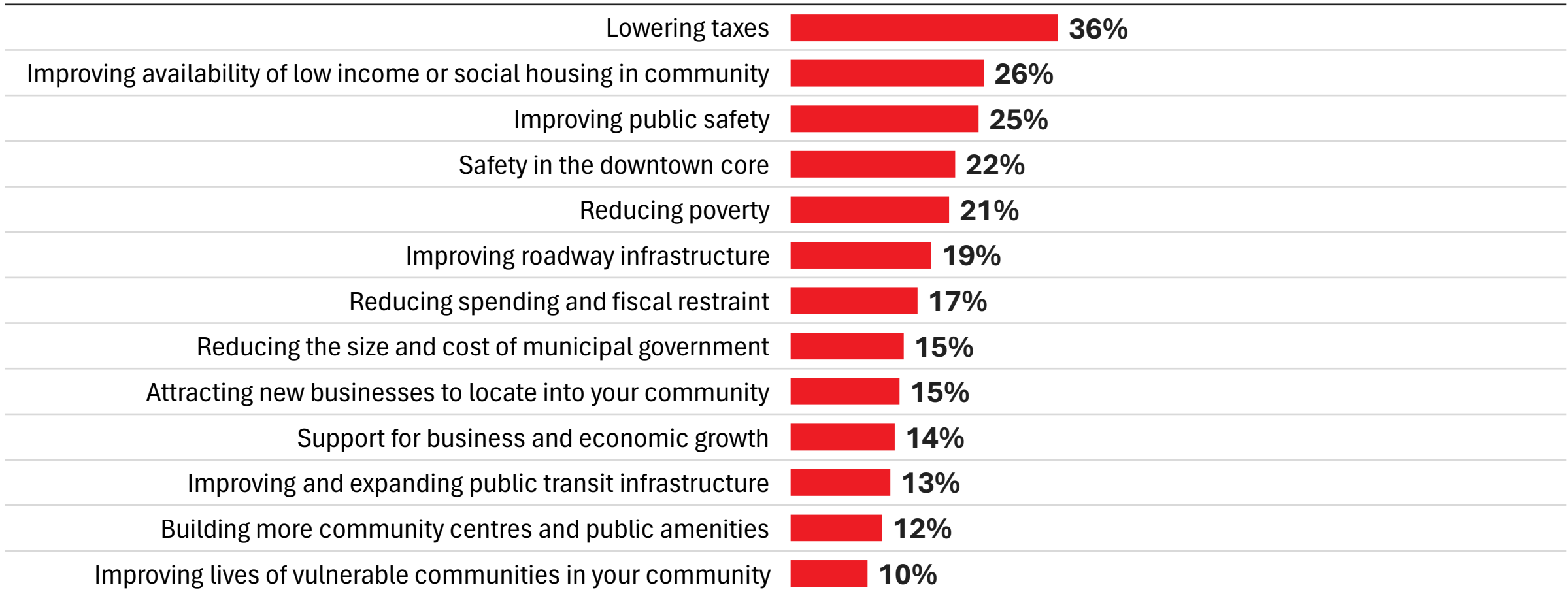
It's a mixed verdict

TOTAL BC (2026)



	Surrey	City of Vancouver	Burnaby	Coquitlam
<b>TOTAL RIGHT DIRECTION</b>	<b>43%</b>	<b>34%</b>	<b>49%</b>	<b>46%</b>
Strongly right direction	5%	1%	1%	-
Somewhat right direction	38%	33%	48%	46%
<b>TOTAL WRONG DIRECTION</b>	<b>39%</b>	<b>56%</b>	<b>37%</b>	<b>34%</b>
Somewhat wrong direction	20%	31%	23%	31%
Strongly wrong direction	19%	25%	14%	3%
Don't know	15%	10%	14%	20%

# Top Municipal Issues Track to National Top of Mind Issues of Affordability, Housing and Safety



Q. What is the number one issue facing your municipality today?

\*2022 comparable data that wording changed in 2026 and tracking should be interpreted with caution

# Top Issues x Jurisdictions

	TOTAL BC	Surrey	City of Vancouver	Burnaby	Coquitlam
Lowering taxes	36%	39%	33%	43%	32%
Improving availability of low income or social housing in community	26%	18%	22%	11%	32%
Improving public safety	25%	35%	35%	22%	31%
Safety in the downtown core	22%	17%	24%	26%	7%
Reducing poverty	21%	29%	18%	14%	23%
Improving roadway infrastructure	19%	20%	11%	20%	19%
Reducing spending and fiscal restraint	17%	19%	14%	10%	7%
Reducing the size and cost of municipal government	15%	11%	19%	14%	6%
Attracting new businesses to locate into your community	15%	14%	9%	5%	10%
Support for business and economic growth	14%	4%	14%	16%	23%
Improving and expanding public transit infrastructure	13%	14%	16%	33%	19%
Building more community centres and public amenities	12%	9%	16%	15%	14%
Improving lives of vulnerable communities in your community	10%	14%	13%	7%	8%

% Statistically significantly higher than total

% Statistically significantly lower than total

# What Community Involvement Looks Like



Frequently/Occasionally

Change from  
2022

<b>(NET) ANY*</b>	<b>97%</b>	<b>+2%</b>
Shop at local stores*	<b>89%</b>	<b>+15%</b>
Visit local parks*	<b>75%</b>	<b>+15%</b>
Vote in last municipal election*	<b>73%</b>	<b>+15%</b>
Pay your property taxes*	<b>66%</b>	<b>+8%</b>
Attended a public event in your community*	<b>47%</b>	<b>+24%</b>
Visit your local library	<b>45%</b>	-
Use the local rec centre*	<b>43%</b>	<b>+6%</b>
Volunteer in your community*	<b>33%</b>	<b>+8%</b>
Provide input via email / online or phone call to your mayor or councillor	<b>20%</b>	-
Coach a kids sports team*	<b>11%</b>	<b>+5%</b>
Attend a council meeting*	<b>10%</b>	<b>+2%</b>

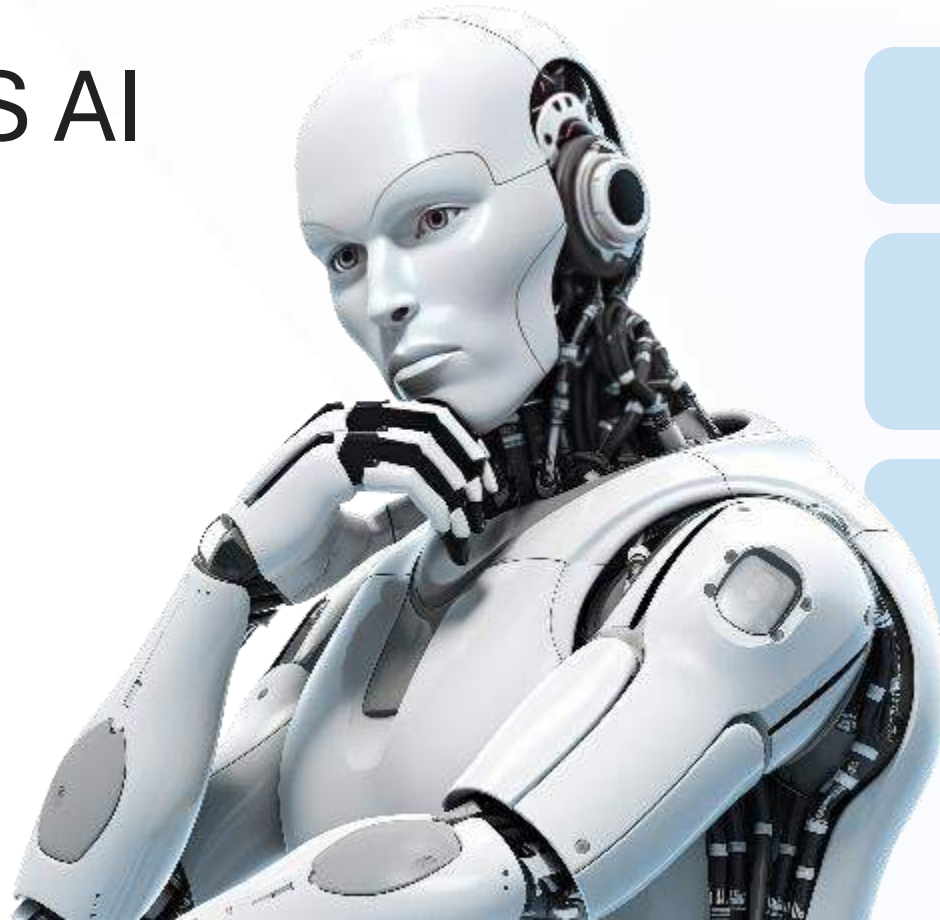
### Voting in last municipal election and community involvement

High engagement	<b>79%</b>	<b>+8%</b>
Moderate-high	<b>85%</b>	-
Moderate-low	<b>78%</b>	
Low	<b>16%</b>	<b>+5%</b>

Q. How frequently are you involved in events, activities and life in your municipality?

\*2022 comparable data that wording changed in 2026 and tracking should be interpreted with caution

# OVERALL **ADOPTION** **AND OPINIONS** TOWARDS AI

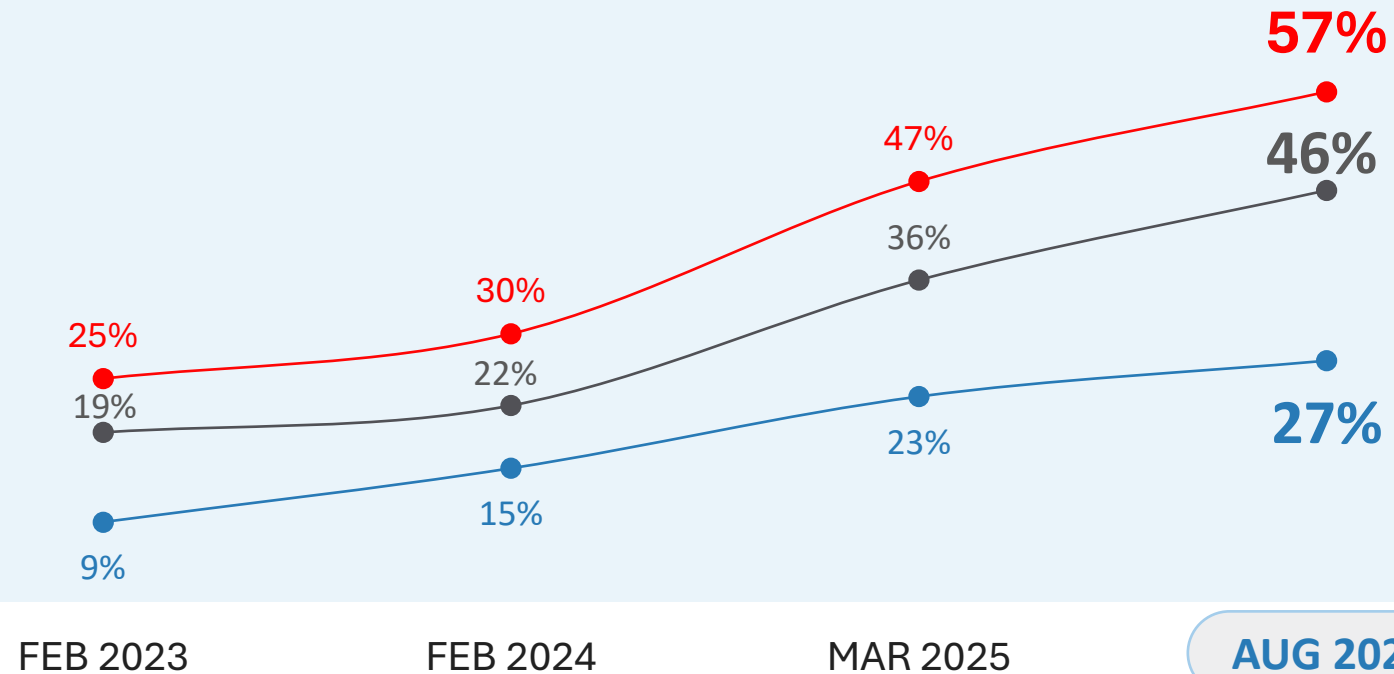


- AI adoption **accelerates**
- But **skepticism and concerns** remain about its broader social implications
- **Influence** may be **more detrimental** than beneficial to society

# Use of **AI Tools** In Canada Continues to Rise



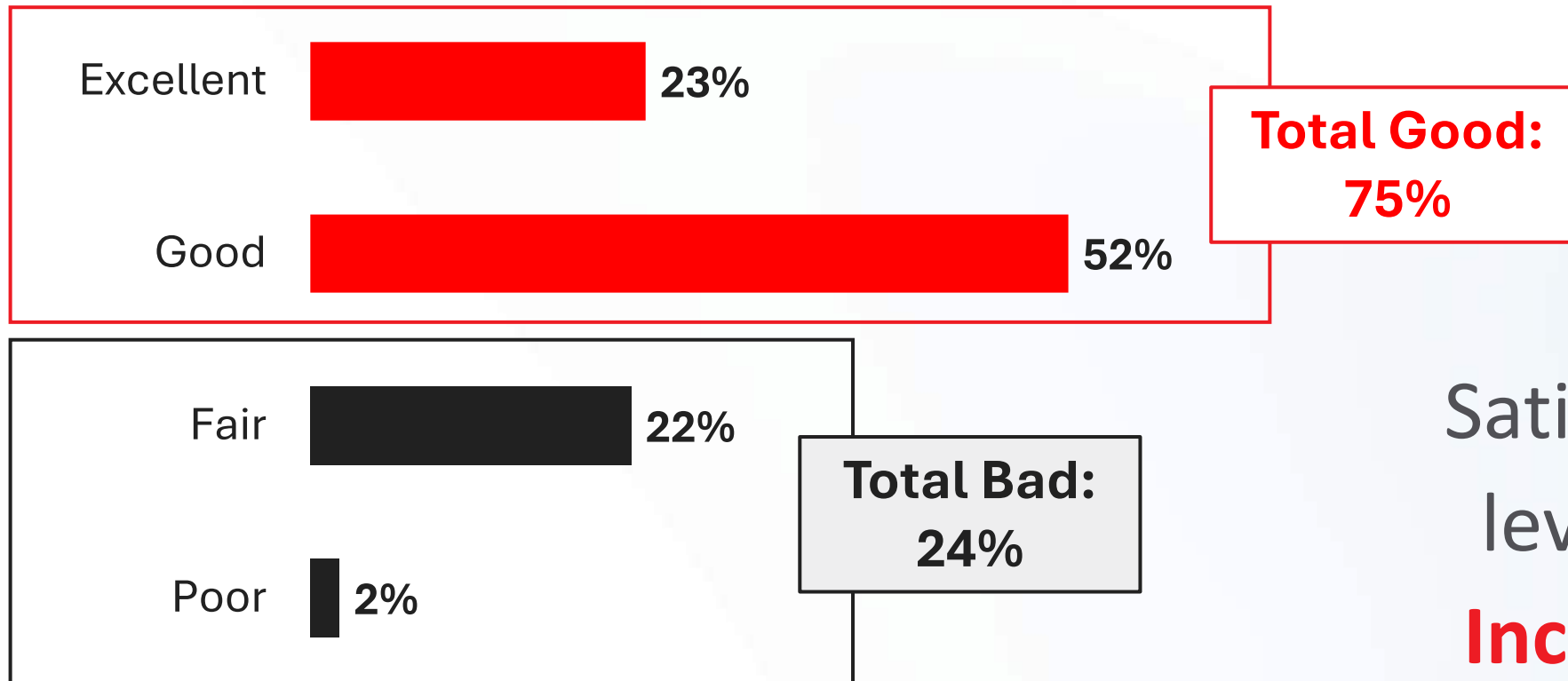
● TOTAL YES      ● YES, In a PERSONAL context      ● YES, For WORK/SCHOOL



Q. Have you ever used an AI tool?  
Base: All respondents

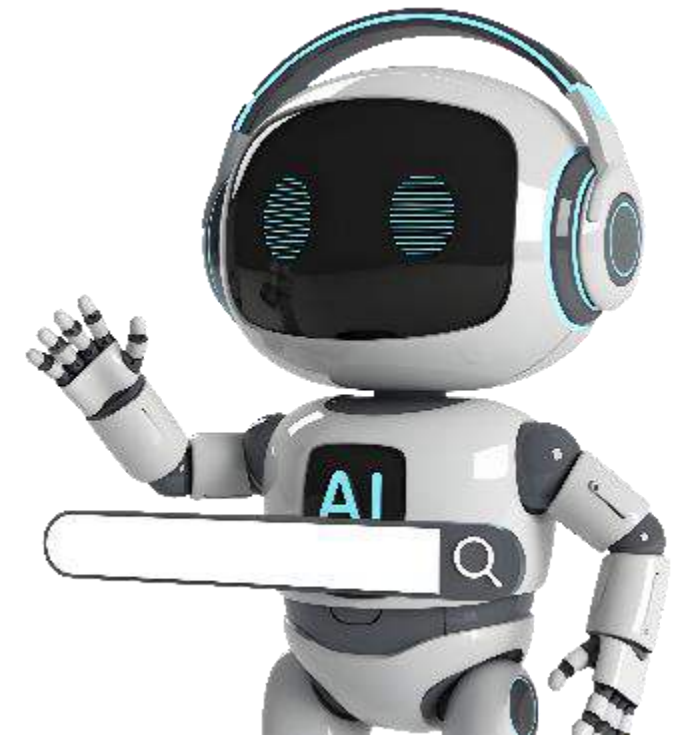
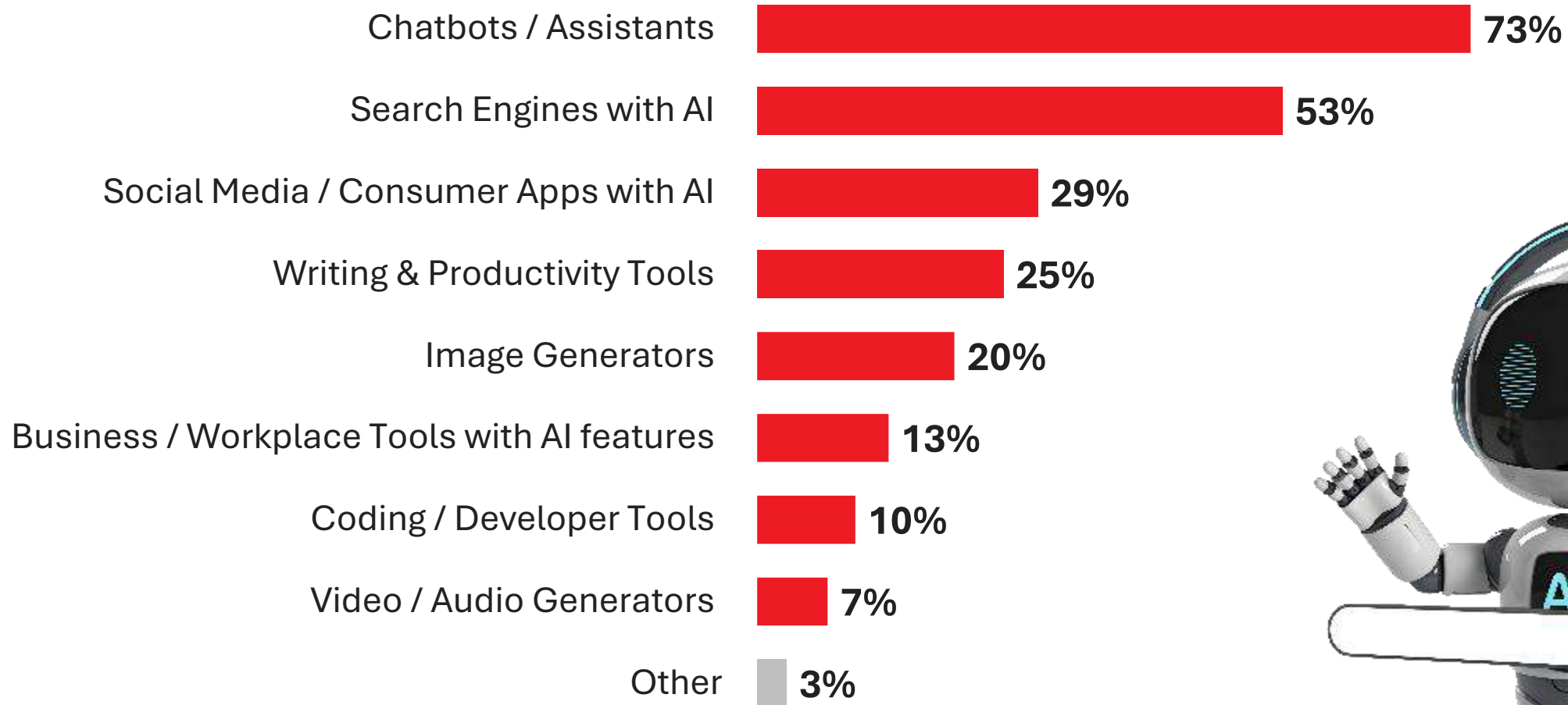
Statistically significantly **higher** than comparison group(s).  
Statistically significantly **lower** than comparison group(s).

# User Satisfaction Ratings for AI Tools



Satisfaction levels are **Increasing**

# AI Tools Tried



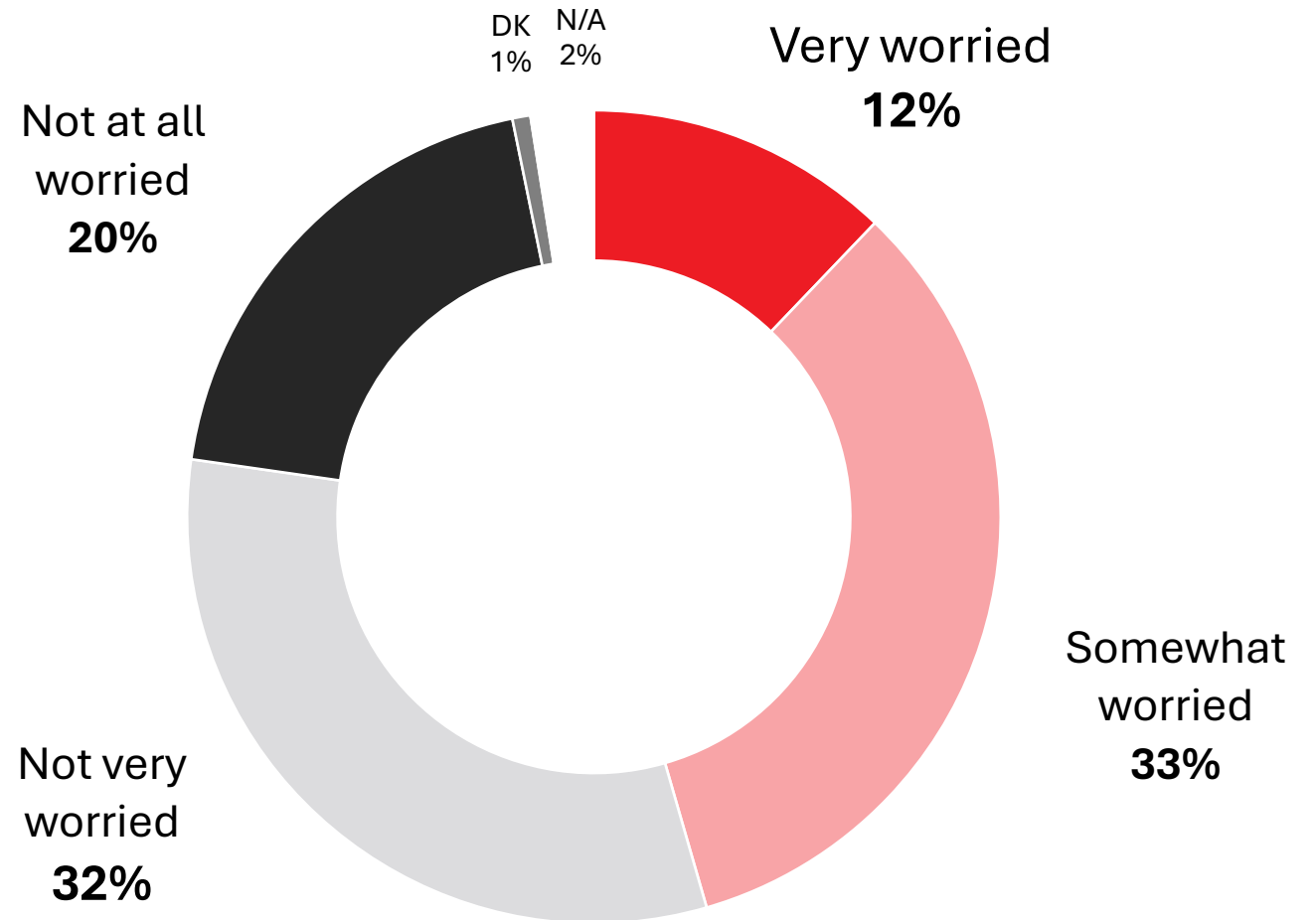
# Concerns About AI and Cognitive Abilities

**46%**

Total Worried

**51%**

Total Not Worried



# Trust in AI Tools is Generally Low

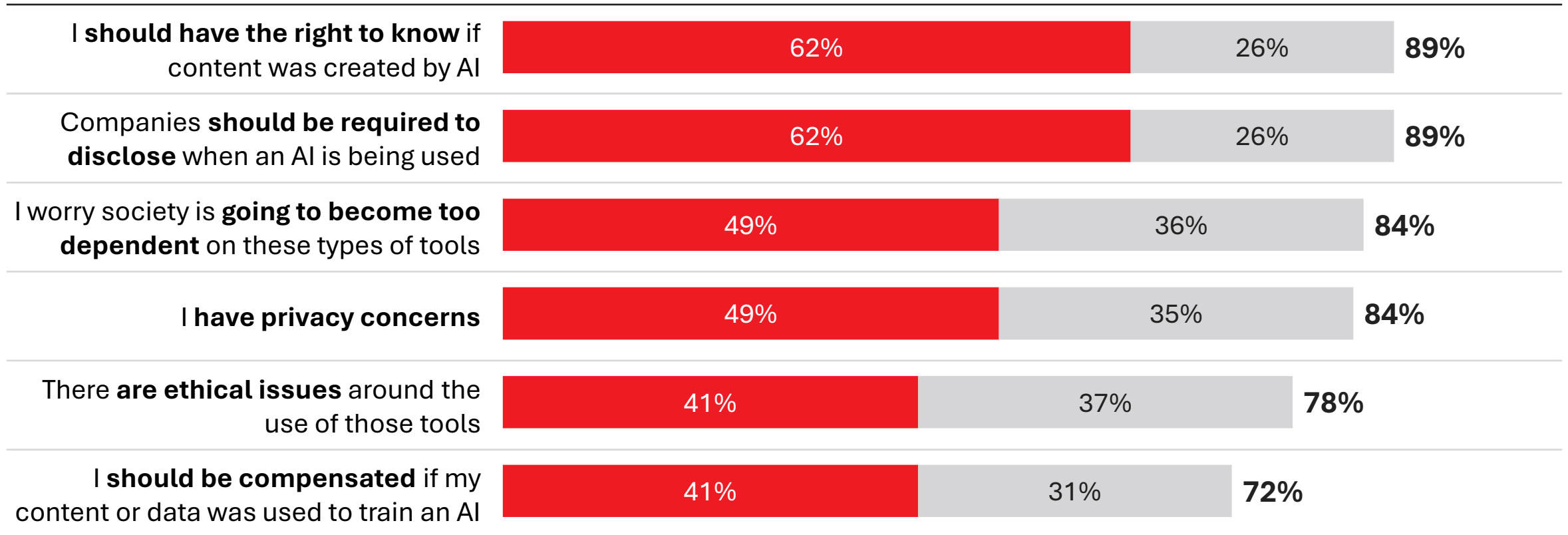
## Overall Trust

	MAR 2025	AUG 2025	Differential of Trust
Completing tasks at home <i>(e.g., adjusting the thermostat, playing music, vacuuming, etc.)</i>	53%	64%	+11
Teaching, tutoring or helping with education	-	48%	-
Answering clinical, health, or medical questions for you/family	34%	36%	+2
Providing medical advice or treatment recommendations	-	32%	-
Providing investment or money management advice	-	32%	-
Giving legal advice	-	31%	-
Offering mental health support or counselling	-	25%	-
Teaching your child(ren) <i>(replacing their teacher)</i>	14%	18%	+4

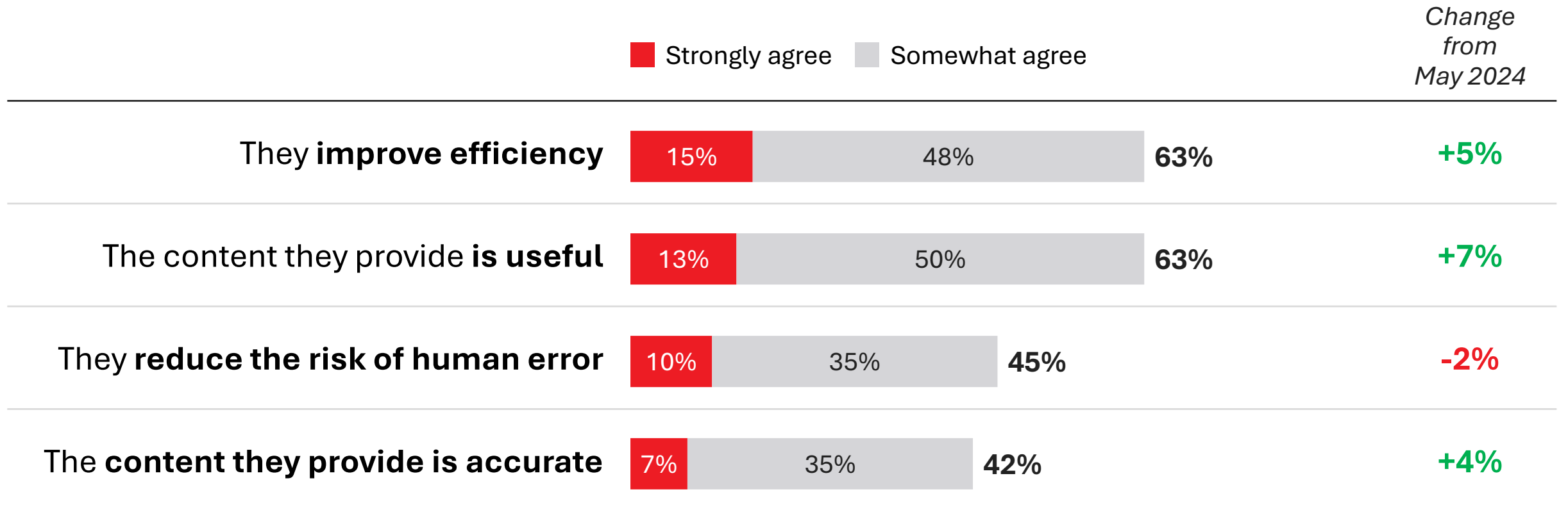
Q. To what extent would you trust an AI tool in each of the following situations?  
Base: All respondents

# Opinions on AI Tools (Personal Rights & Privacy Concerns)

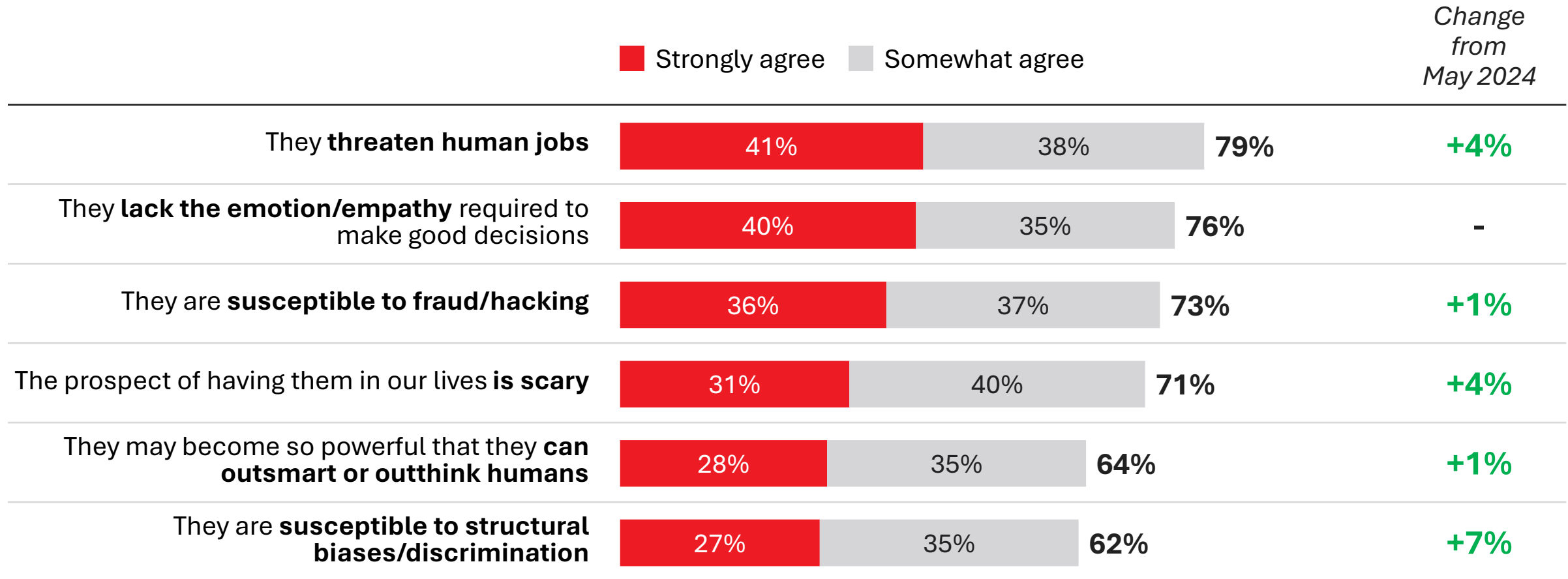
■ Strongly agree ■ Somewhat agree



# Opinions on AI Tools (Positive)



# Opinions on AI Tools (Negative)



# Overall Takeaways

#1

Overall **consumer sentiment is not optimistic**, and there's no catalyst on the horizon to change that.

#2

**The tariff issue dominates the public agenda**, but consumers are becoming slightly weary of it, and the top issues that have been resurrected are inflation/housing and social issues.

#3

**Anti-American sentiment** as a result of **Trump/Tariffs** have had a **dramatic** impact on consumer **purchasing intentions** and shows no sign of abating.

#4

Canada shines on the world stage, and **Carney is responsible for that**. Majority in the Commons means stability at the national level.

#5

**David Eby's** approval ratings have fallen due to his fiscal management, Indigenous affairs, and other issues. New leadership across aisle could change the political dynamic.

#6

Voters in this Fall's **municipal elections** are not in a complacent mood. Open to a 'change' argument, but there is value in the stability of remaining with an incumbent.

# Free Resources/Downloads from Leger



Canadians & Charitable Giving



Economic Confidence Report Card



Impact of Trump on Investing



Federal Voting Intentions



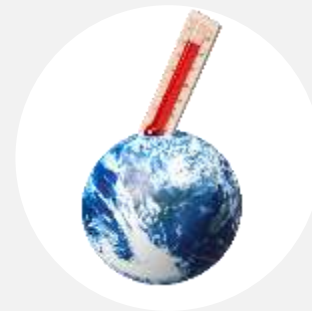
WOW



2023 Youth Study



Reputation



Digital Canadian



Newcomers to Canada



Government Report Card

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