

The Five Canadas at a Crossroads (Part I)

A changing political landscape

October 27, 2026

ECO INSIGHTS

EcoAnalytics

A project of MakeWay

Agenda, Part I

Today's webinar

- Welcome, project overview & objectives
- Revisiting the Five Canadas of Climate Change: Does the segmentation framework still hold? What's changed?
- Understanding the current moment: What issues are Canadians prioritizing?
- Implications and discussion: What do findings mean for ENGOs and what questions should we investigate next?

Part II (date TBC): Experimental findings, communications tips, and recommendations

Research overview, objectives

Overview

The project centred on a national survey of 3,069 Canadians, co-designed by EcoAnalytics' NGO members, and conducted September 15–23, 2026.

The aim? To understand the changing public opinion landscape and identify promising approaches to environmental communications.

Objectives

1. **Revisit the Five Canadas.** Understand how key audiences and attitudes have evolved since 2023.
2. **Assess this moment.** Examine how Canadians are thinking about economic uncertainty, nation-building, and the relationship between development & environmental protection.
3. **Identify promising communications.** Test arguments, counter arguments, and frames that could build broader support for environmental protection in the current context.

Sampling and fielding

Fielding dates: September 15–23, 2026

National online survey of adults aged 18+ across Canada's ten provinces

- Designed to support comparison with the 2023 CA-MAP study
- Final sample = 3,069

Quotas set for age, gender, region and education (ensuring working class sample as in 2023)

Further weighted to regional-level census population characteristics to enhance representativeness

Executive summary: A changing political and public opinion landscape

- **The Five Canadas remain, but their profiles have evolved.** The broader audience structure persists, while climate concern has softened, conservative attitudes have strengthened, and the political middle has been reconfigured.
- **Canada's political landscape has shifted.** Liberal support has surged across much of the segmentation, while affordability, economic security, and independence from the United States have become central concerns.
- **Support for energy development (i.e. electricity, oil & gas) is broad**: This extends well beyond traditionally conservative audiences, including Canadians who remain highly concerned about climate change.
- **Canadians see compatibility, but prioritize growth when forced to choose.** Most believe economic development and environmental protection can generally go hand in hand; but economic growth takes precedence in the current context.

A changing public opinion landscape

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Questions asked in revisiting the Five Canadas

The Five Canadas were developed from EcoAnalytics' CA-MAP national survey (fall 2023).

Questions we asked this time:

- Does the same five-segment structure still emerge from the 17 original criteria and does it still perform well?
- Are the segments substantively the same, or have their defining attitudes and characteristics changed?
- What does the moveable middle look like in 2026?

Our analysis let the data speak

As well as repeating the original 17 segmentation indicators, our analysis did the following:

1. **Let the 2026 data speak:** We tested a new model with varying number of classes using the 2026 responses, allowing the audience profiles to emerge from the current data rather than imposing their 2023 definitions

2. **Tested continuity with the original framework:** We compared the updated profiles with the original segmentation and used multi-group latent class analysis to examine the extent to which the profiles remained consistent

3. **Identified how the segments have evolved:** We examined how each group's attitudes, values, and defining characteristics have changed since 2023, identifying what remains stable and what has shifted.

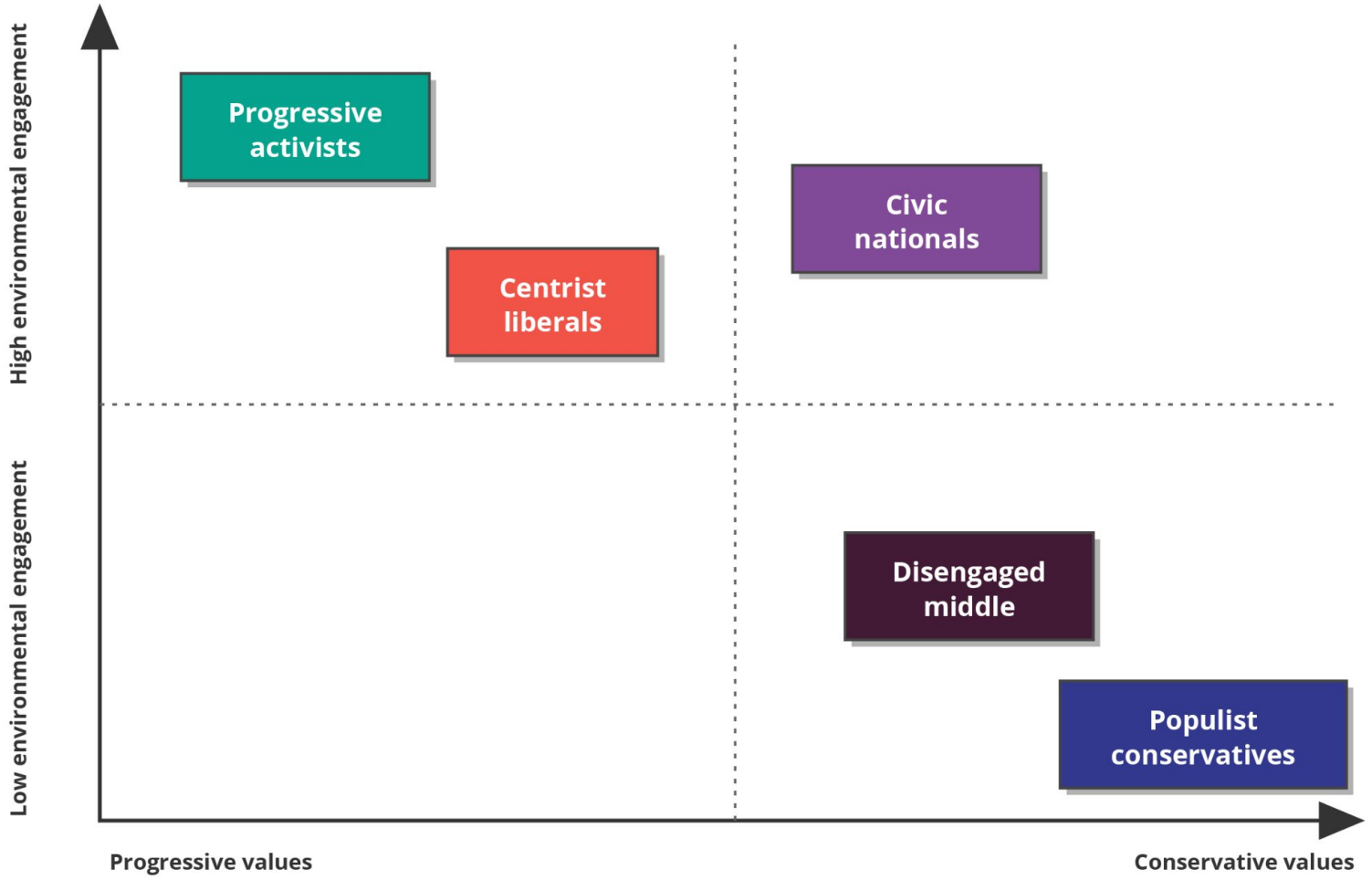
Segmentation criteria



- Climate beliefs
- Emotion
- Identity
- Political and social values

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Political and environmental values

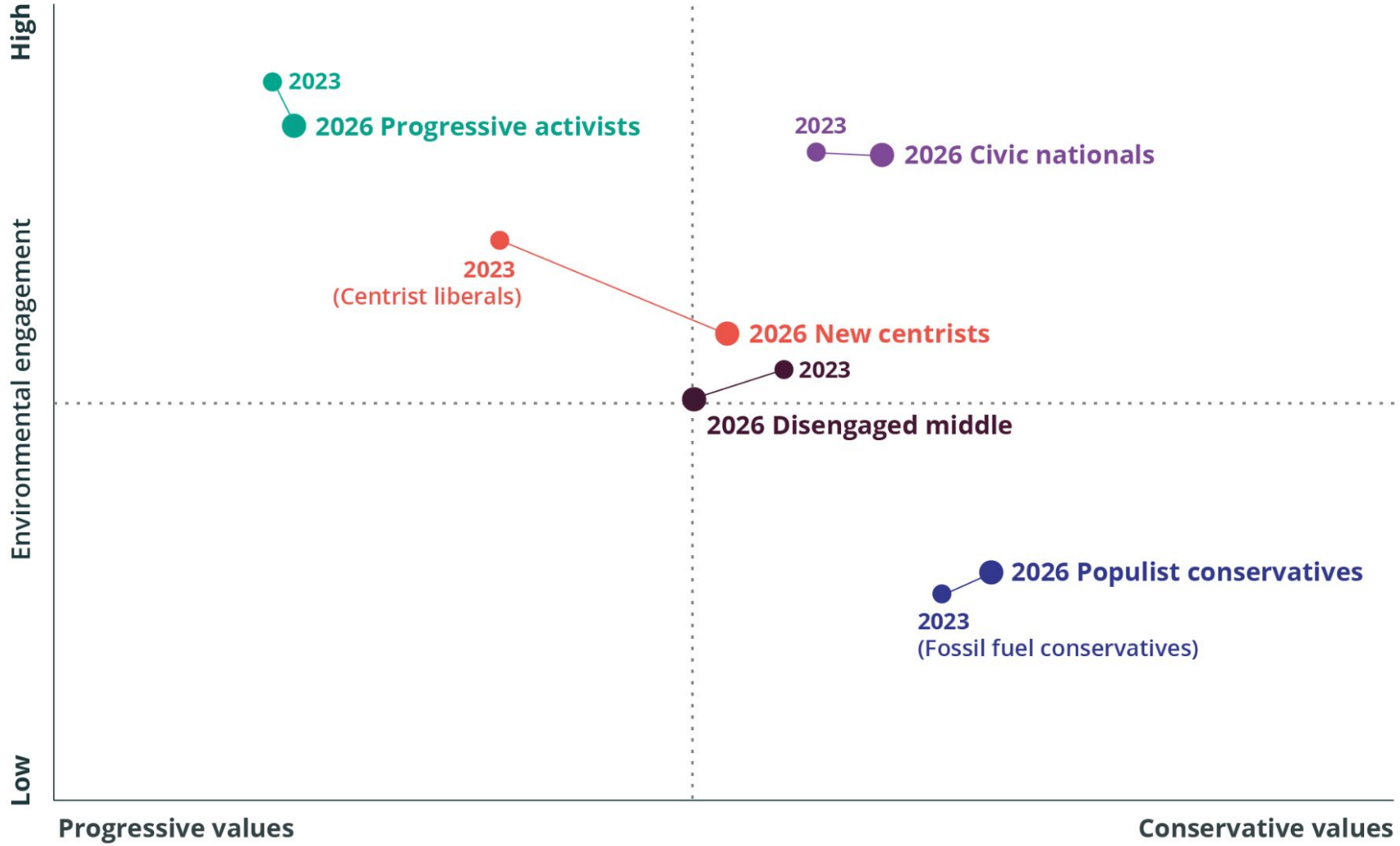


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Five segments still, but profiles have evolved

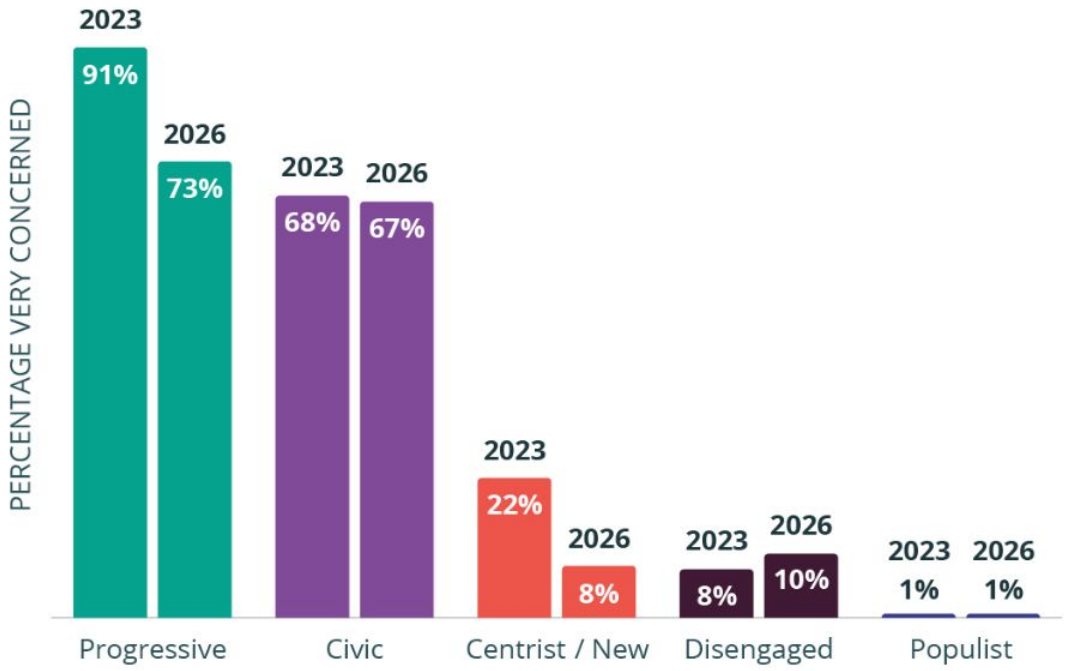
- **Continuity in the broader structure:** Five distinct audiences continue to emerge: four retain enough of their defining characteristics to keep their original names: Progressive activists, Civic nationals, Disengaged middle, and Populist conservatives
- **Shifts within the profiles:** Climate concern has softened across several segments, while conservative social and political attitudes have become more pronounced
- **Middle segments change most:** The most significant changes are found in two of the middle segments. The former Centrist liberals are now better described as New Centrists, reflecting their more conservative outlook. The Disengaged middle has become more consistently disengaged with environmental and social issues and now accounts for a smaller share of the electorate

Values of all segments have shifted

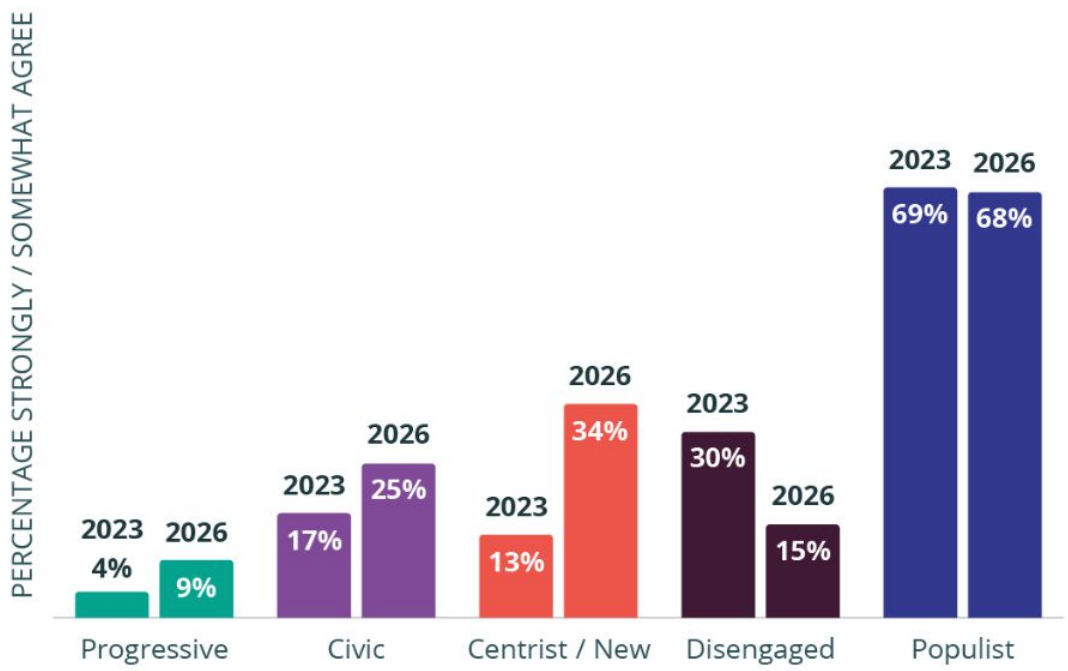


Softening of climate concern

How concerned are you, if at all, about climate change?

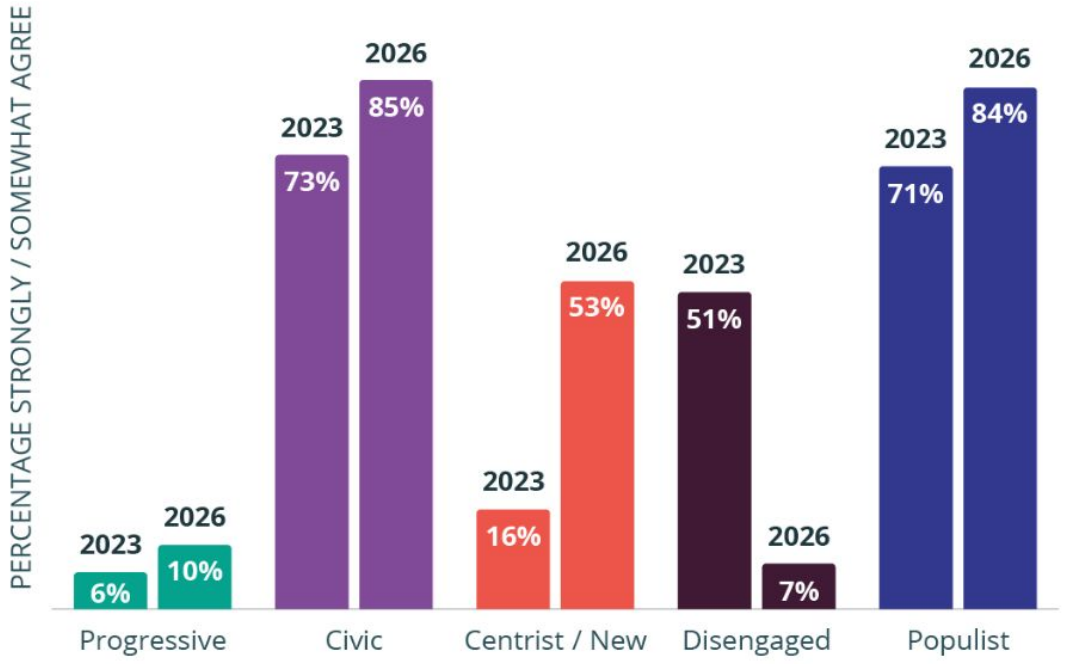


Agree/disagree: I'd rather enjoy my life than worry about my impact on climate change

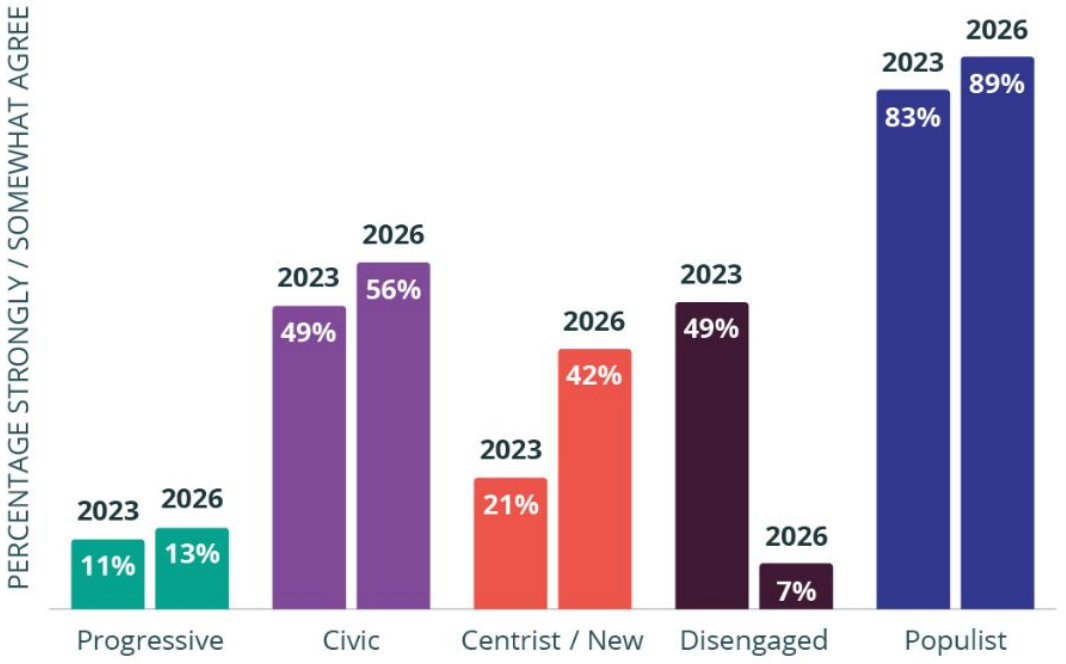


Conservative values harden

Agree/Disagree: I worry about becoming a minority in my own country



Agree/Disagree: The government interferes far too much in our everyday lives

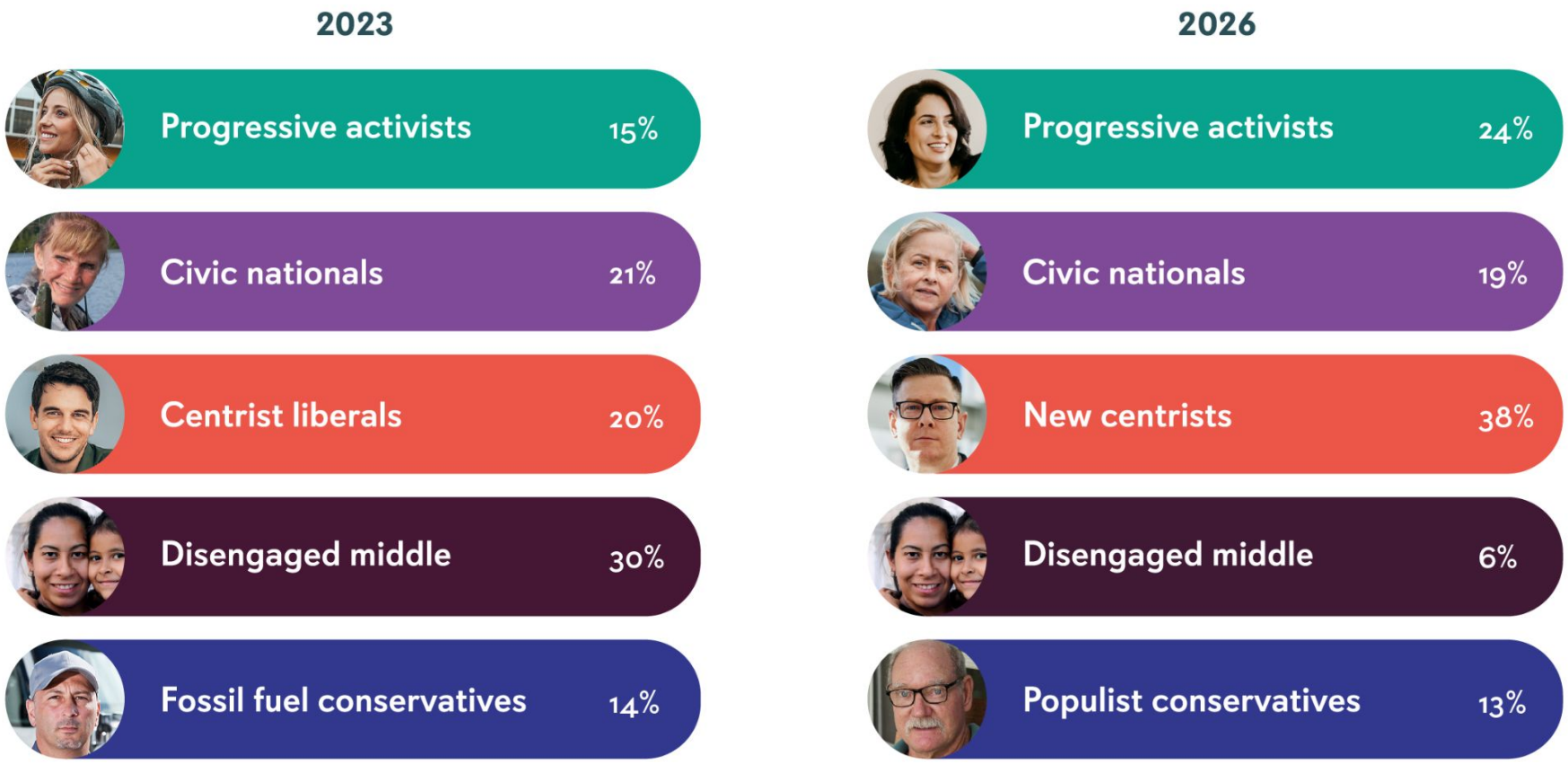


Five Canadas: Continuity and change

Profile	What remains	What has evolved
Progressive activists	Strong climate concern and progressive social values	Softer climate concern (73% now very concerned, down from 91%), with progressive values mostly intact.
Civic nationals	High climate concern combined with conservative social and political values	More worry about becoming a minority (84%, up from 71%), preference for common sense over experts (74%, up from 70%) and agreement that government interferes too much (89%, up from 83%). Agreement that wealthy insiders take more than their fair share also rises (72%, up from 66%).
New centrists	Moderate climate concern, situated between the more environmentally engaged and sceptical audiences	Markedly more conservative outlook: More worry about becoming a minority (53%, up from 16%), preference for common sense over experts (39%, up from 18%) and agreement that government interferes too much (42%, up from 21%). Less intense climate concern (8% very concerned, down from 22%).
Disengaged middle	Low engagement and weakly expressed positions	Neutrality increasingly dominates: 86%, up from 48%, neither agree nor disagree that climate change's effects are exaggerated.
Populist conservatives	Lowest climate concern and strongly conservative social and political values	Stable climate scepticism (1% very concerned), alongside stronger minority concerns (84%, up from 71%) and opposition to government interference (89%, up from 83%).

Comparing two audience landscapes

Segment shares reflect the profiles estimated separately in 2023 and 2026. Differences should not be interpreted as direct growth or decline of identical groups.

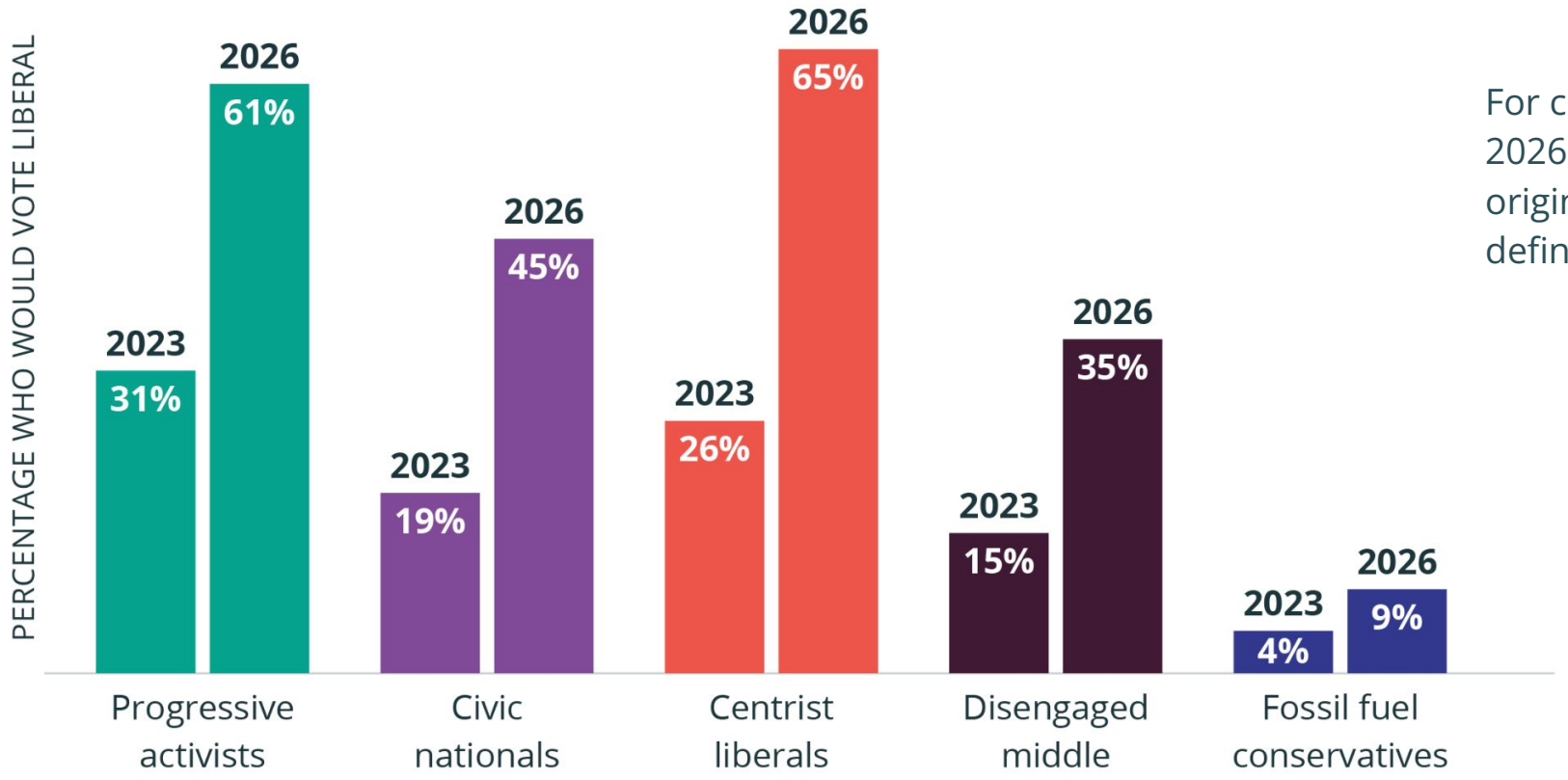


What distinguishes this moment

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Surging support for federal Liberals

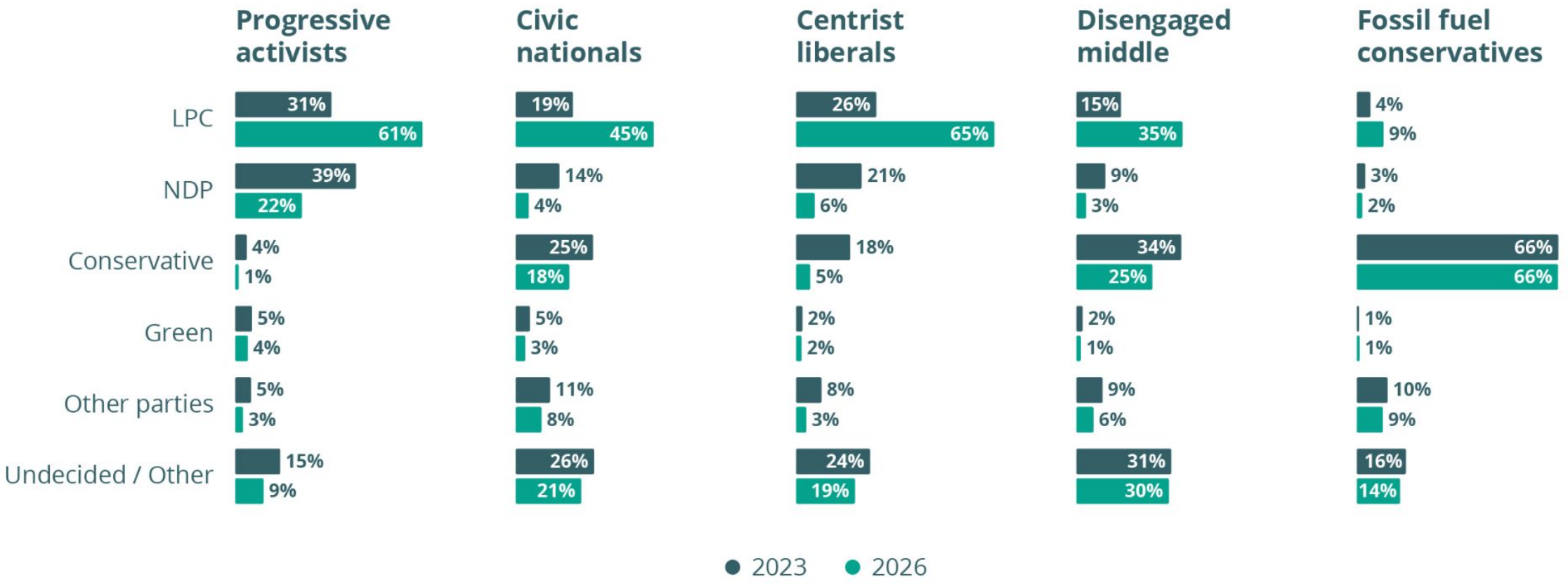
Overall support governing party rose from 19% in 2023 to 43% in 2026



For comparability, the 2026 results use the original 2023 segment definitions

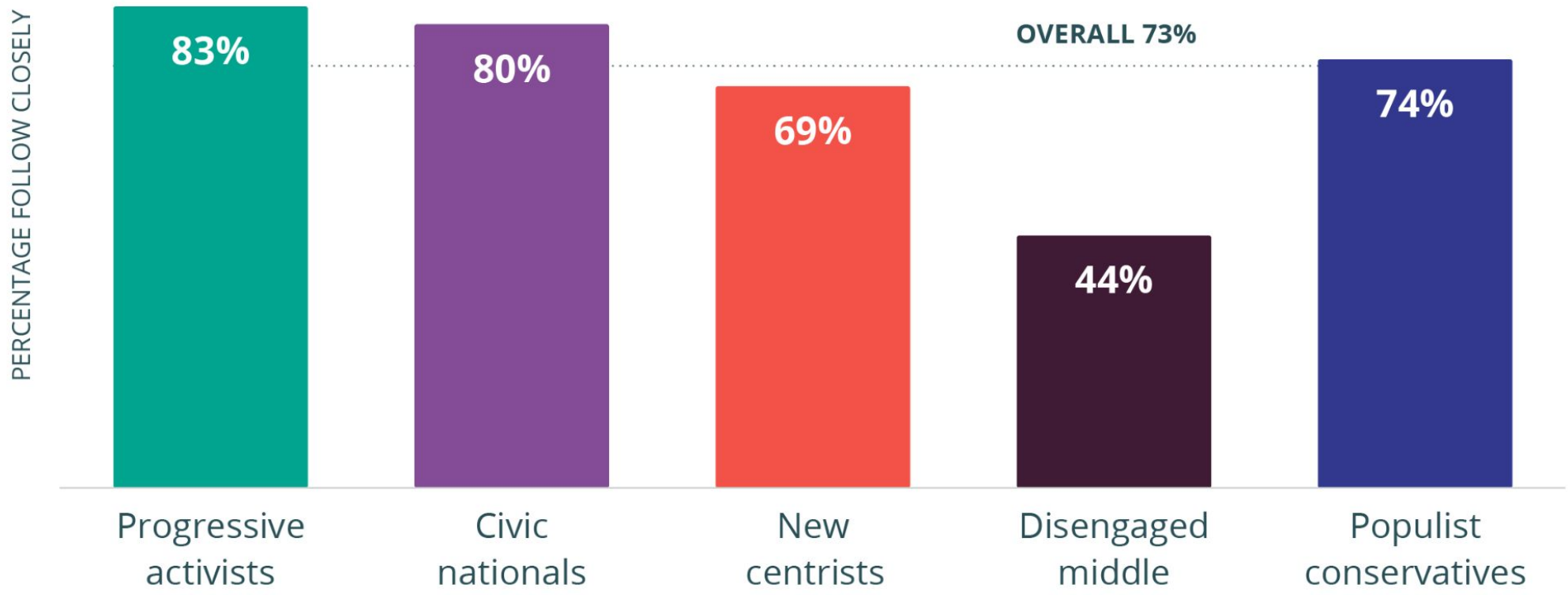
Liberal coalition grew at NDP's expense, mostly

For comparability, the 2026 results use the original 2023 segment definitions



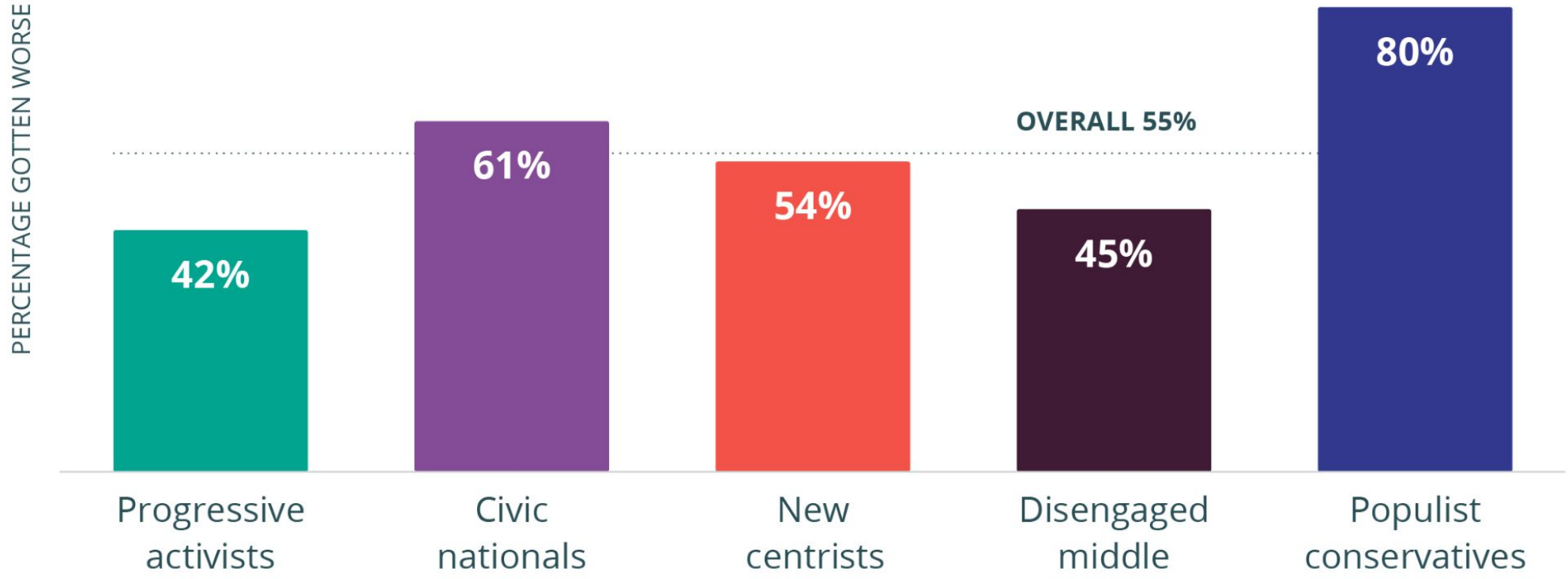
Trump and trade are salient across audiences

How closely have you been following news about Canada's trade war with the United States?



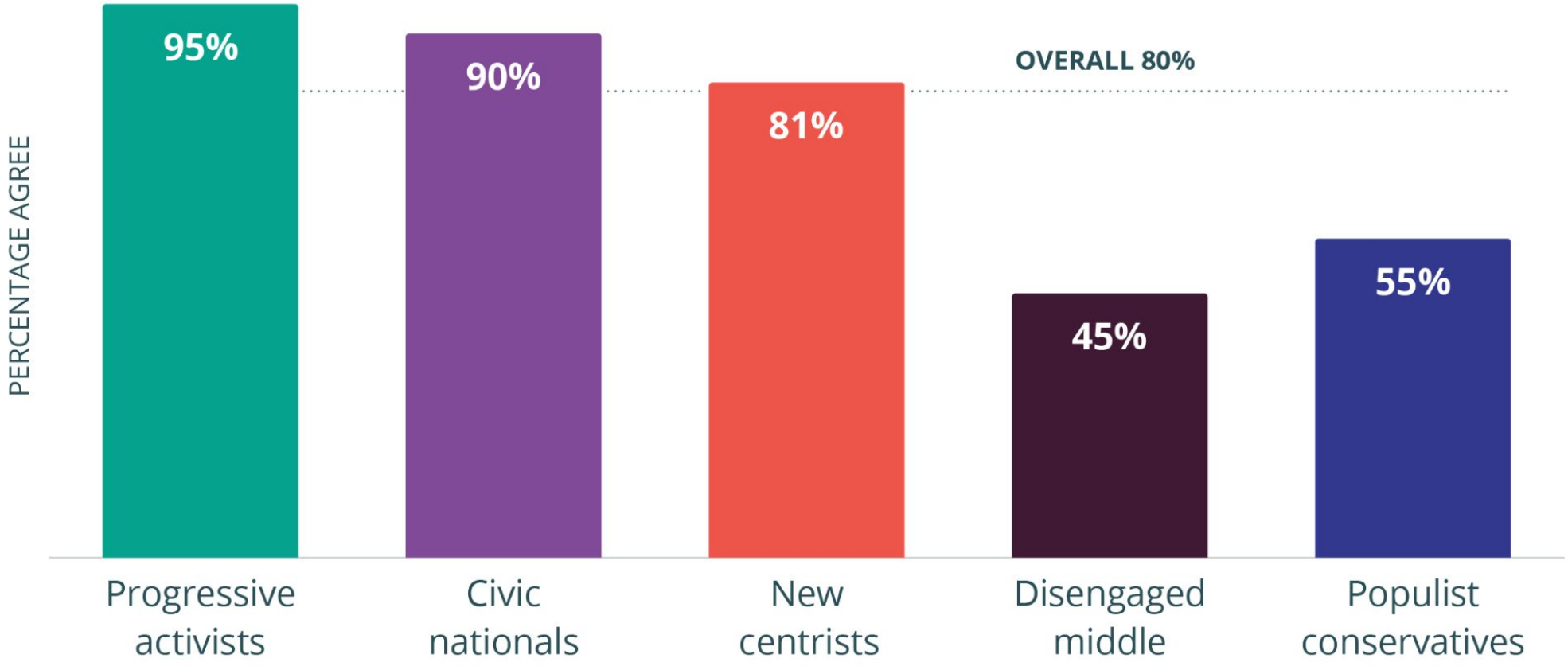
Shared economic pessimism

Thinking about the Canadian economy overall, compared with one year ago, would you say it has gotten worse?



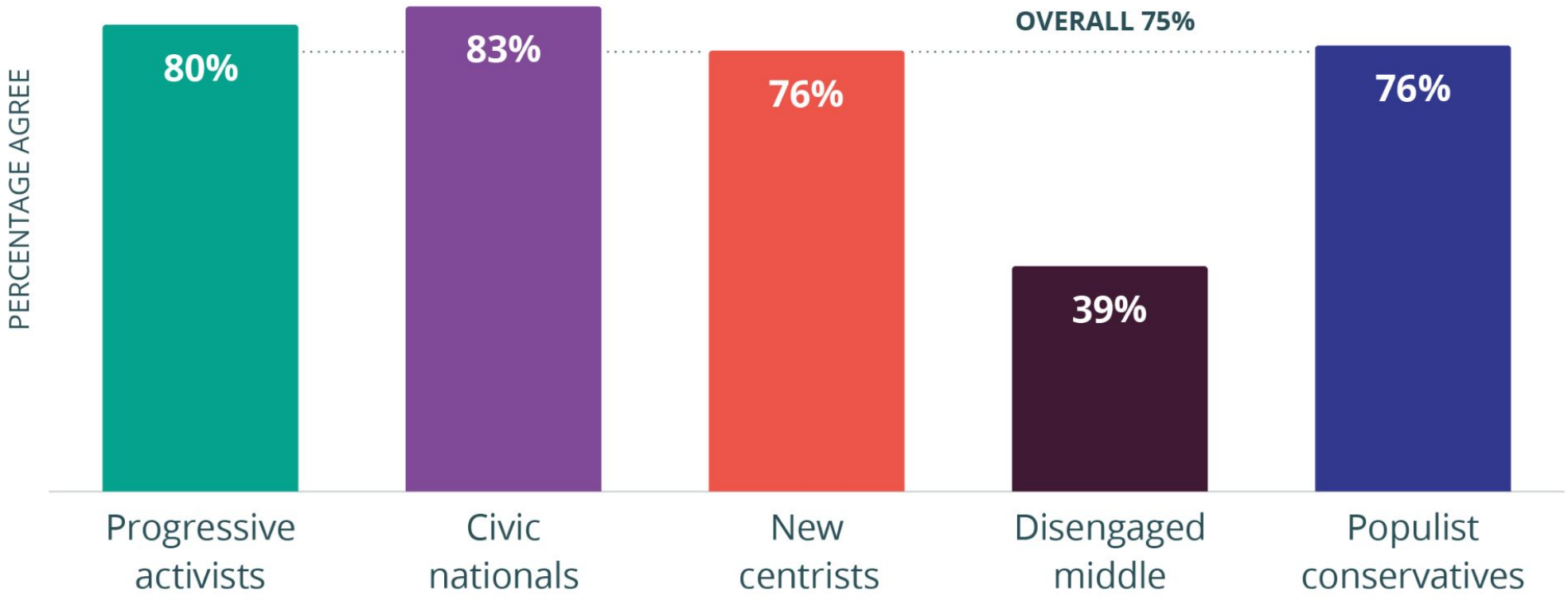
More economic independence appeals to us

Agree/Disagree: Canada needs to become more economically independent from the United States



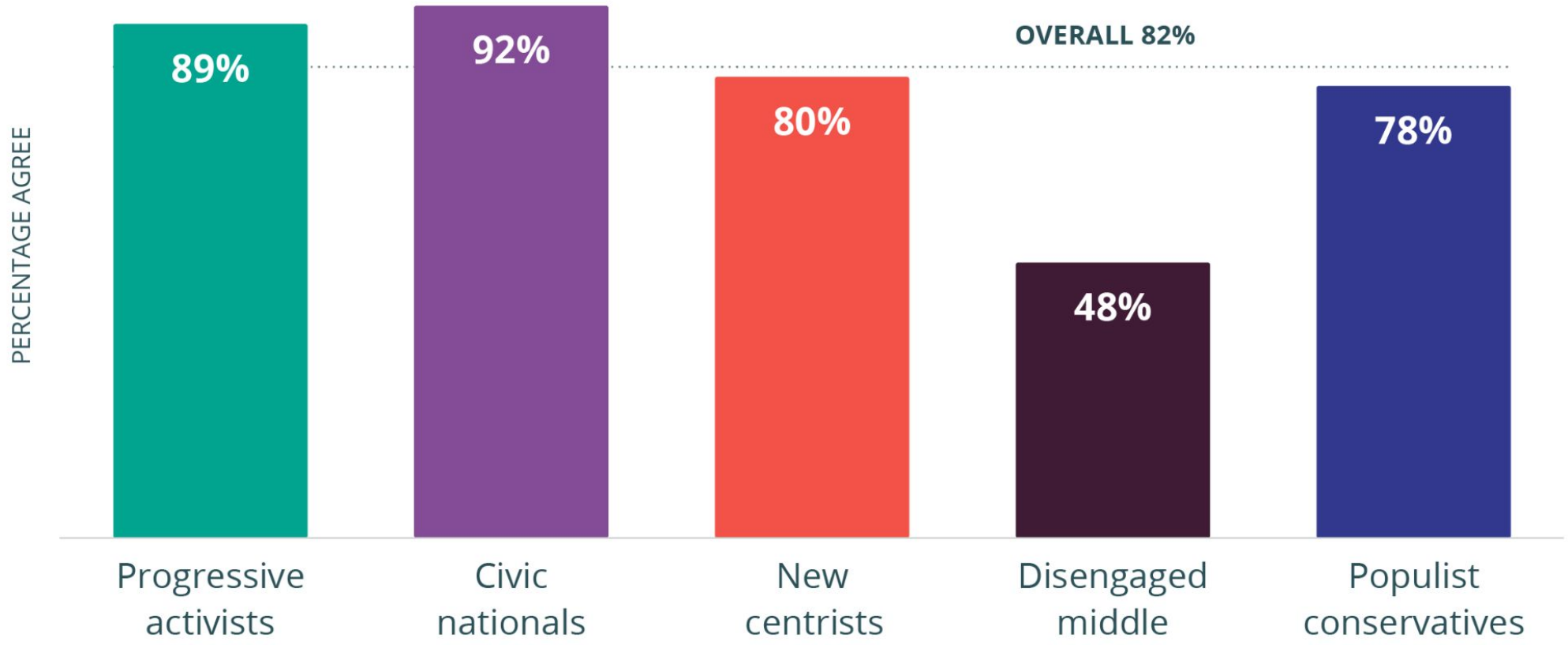
Broad support for development

Agree/Disagree: Large economic development projects are essential to Canada's prosperity



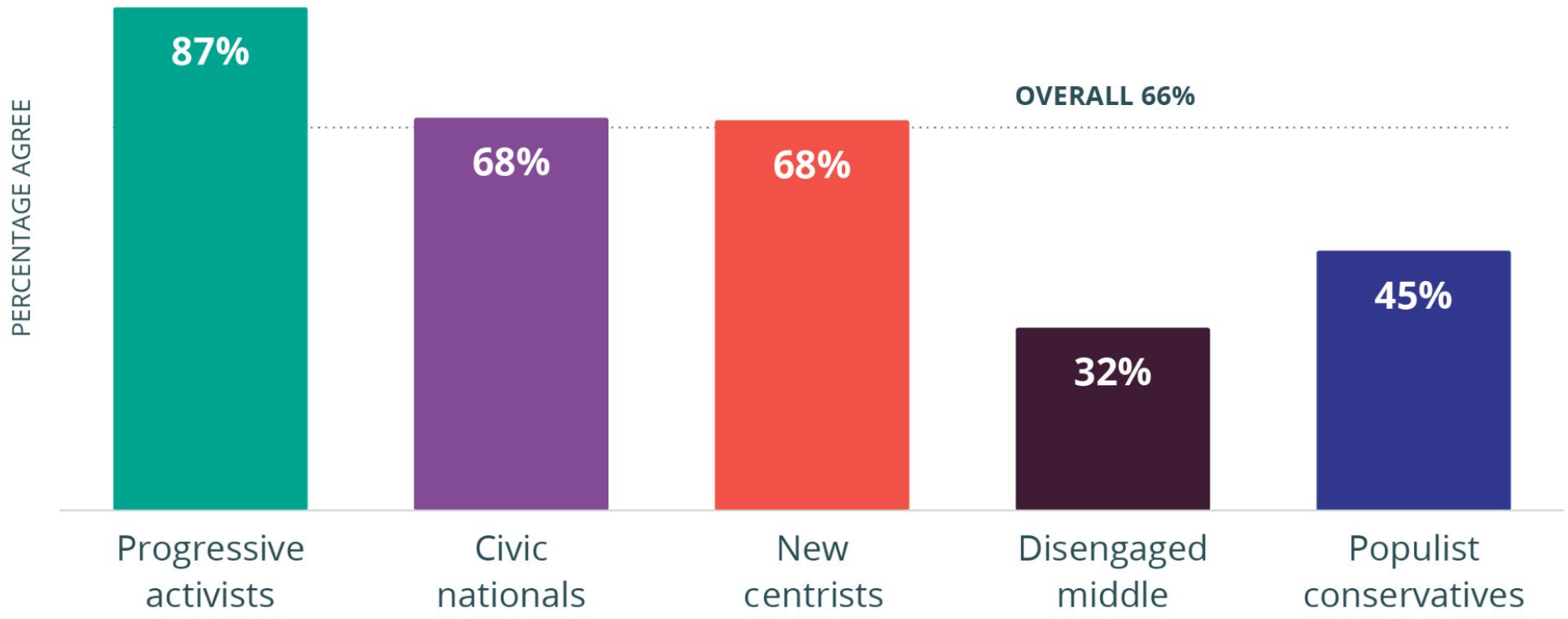
A sense of global insecurity

Agree/Disagree: The world has become more dangerous and unpredictable in recent years



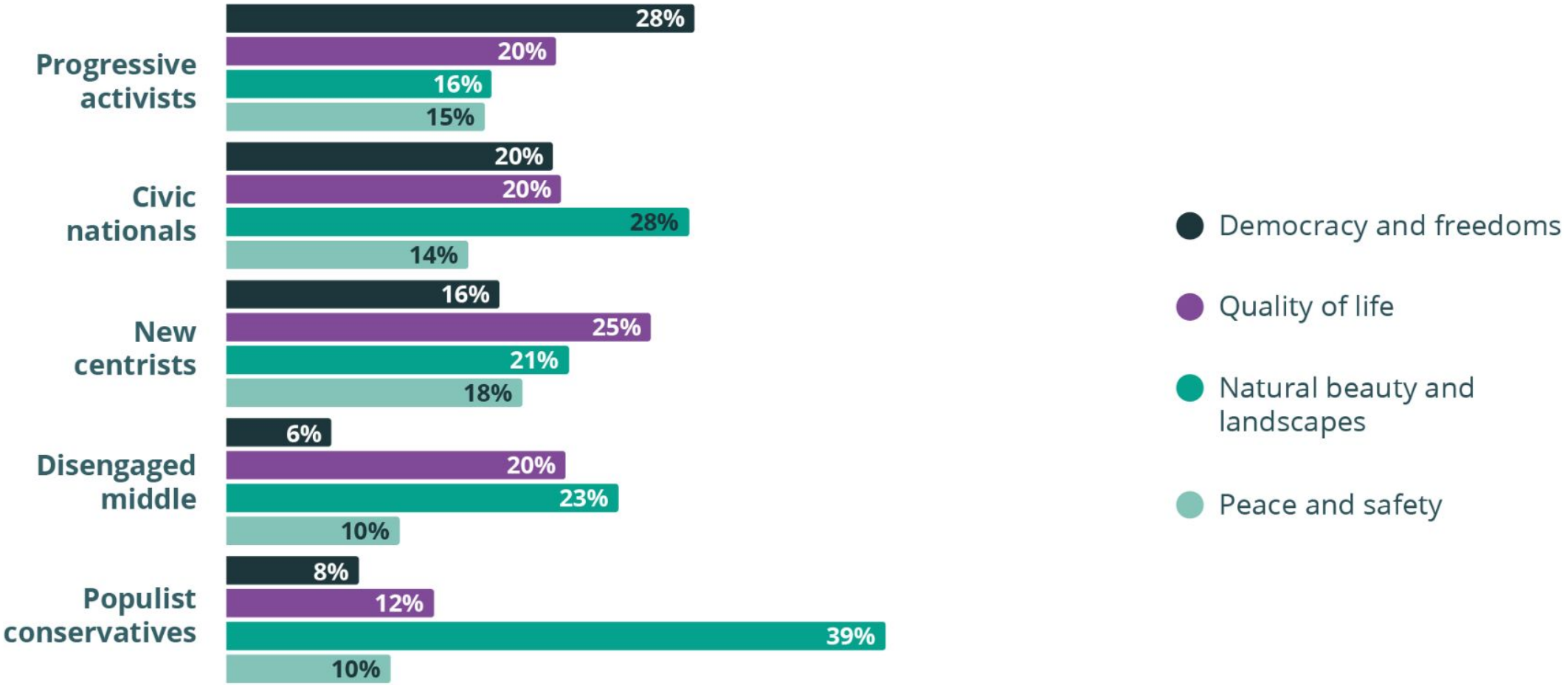
Canadians see more common ground than division

Agree/Disagree: Canadians have more in common than what divides us



Sources of pride in Canada vary

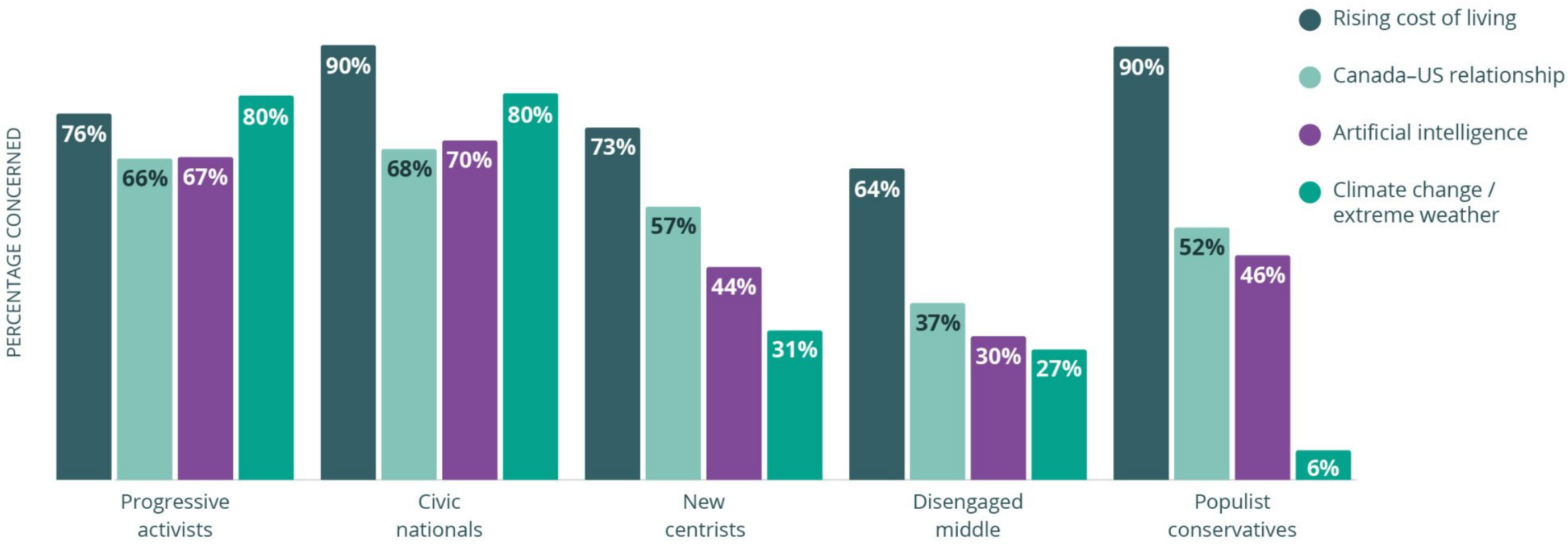
When you think about Canada, what makes you most proud?



Issue salience

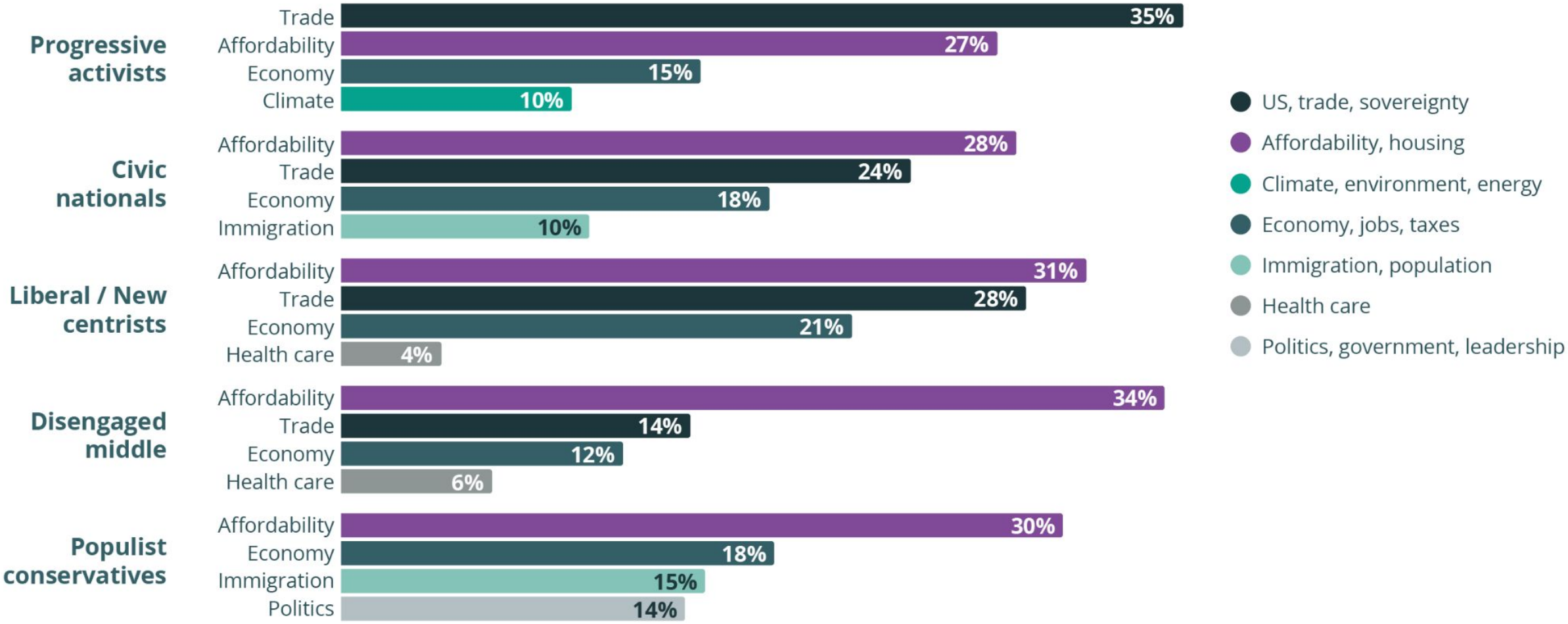
Affordability leads for most segments

How concerned are you, if at all, with each of the following?



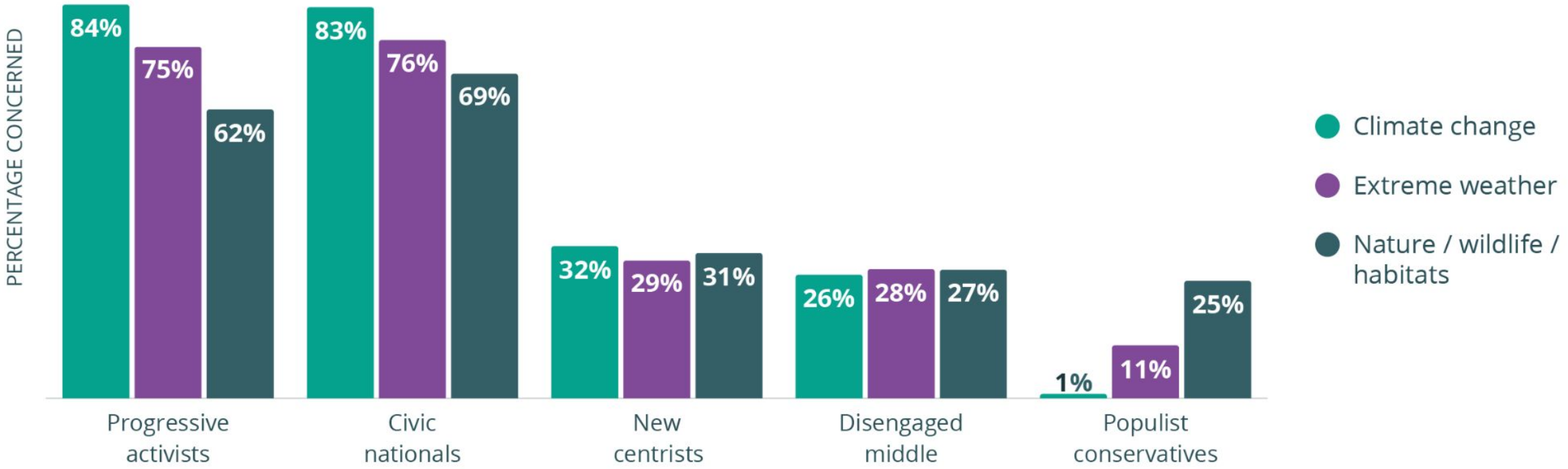
Economic issues are top of mind

In your opinion, what is the most important issue facing Canada today? *Unprompted*



Three segments differentiate climate, weather, nature

How concerned are you, if at all, with each of the following?

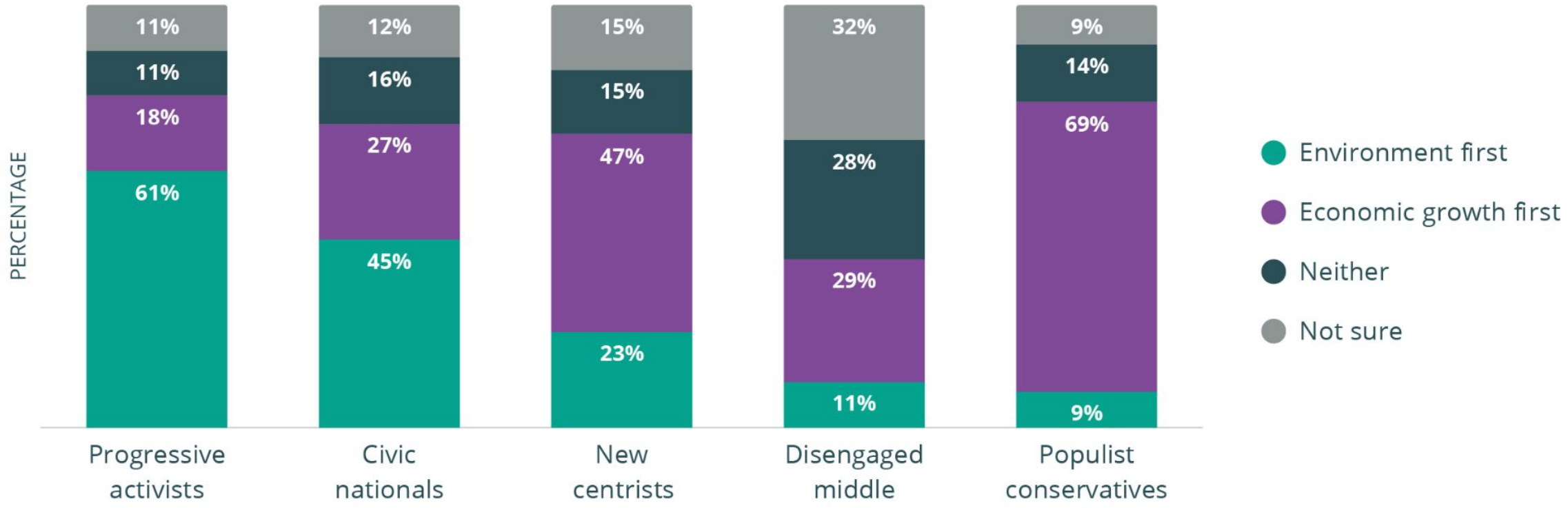


Environmental protection & growth

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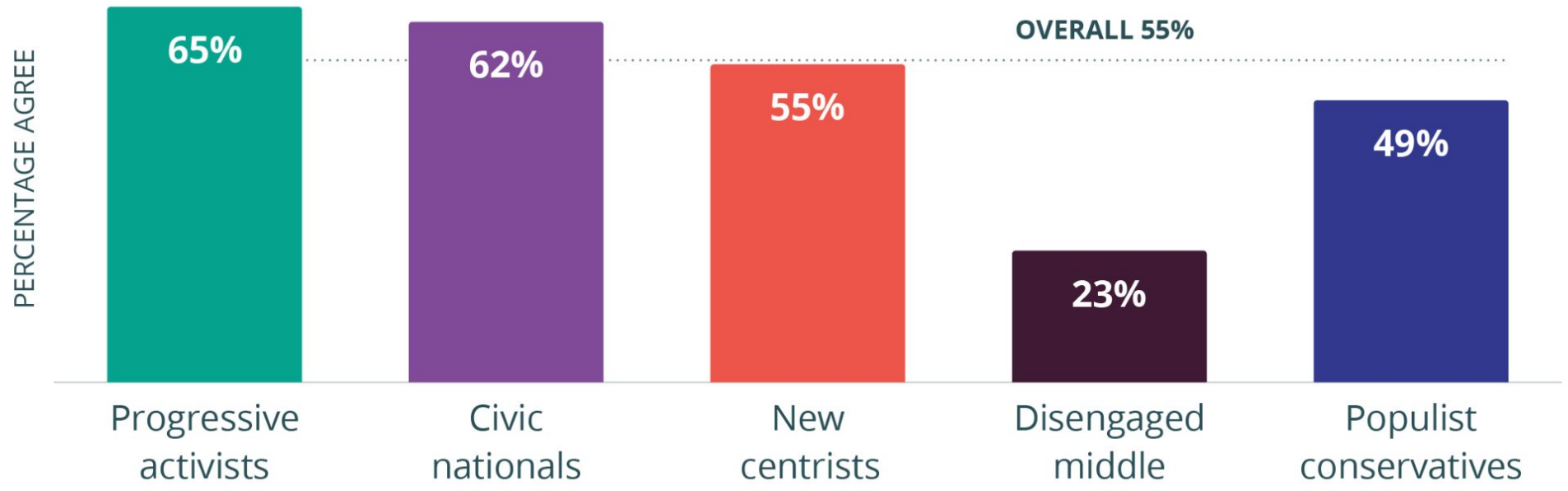
Growth wins out over environment, generally

If economic growth and environmental protection were to come into conflict, which of the following comes closer to your own view?



Most think growth and protection can go hand in hand

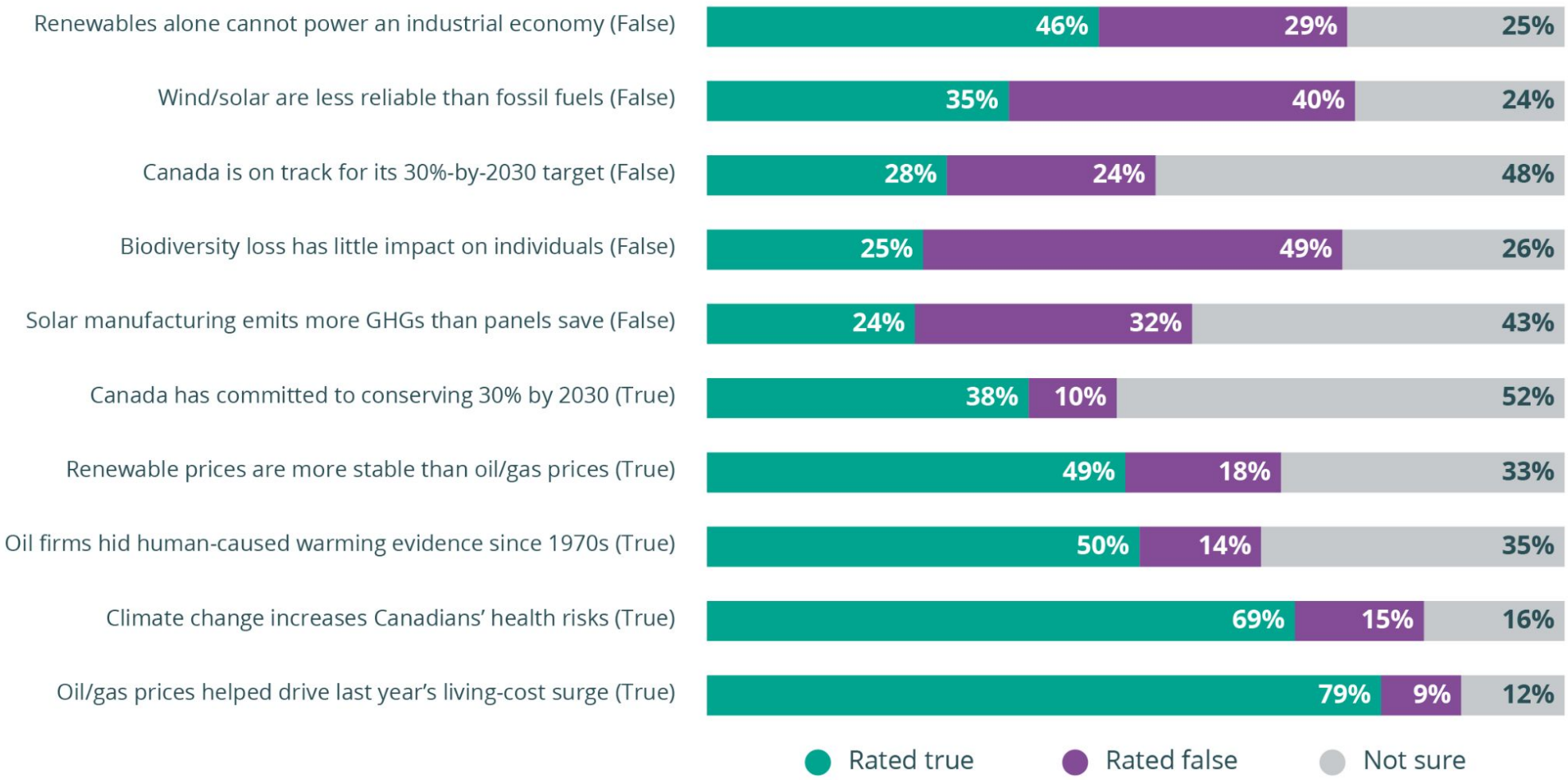
Agree/Disagree: Economic growth and environmental protection can generally go hand in hand



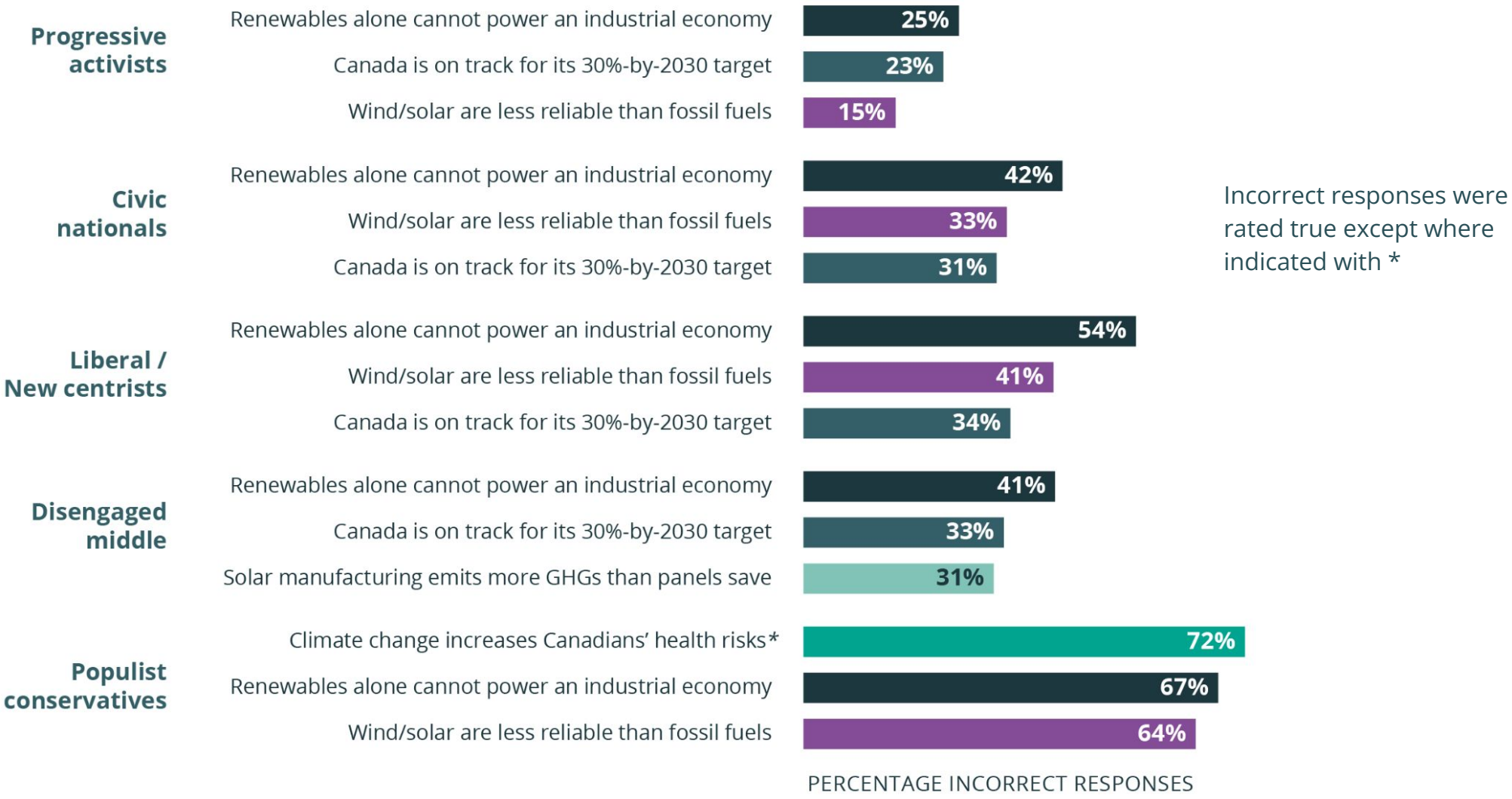
Knowledge and trust

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Information gaps abound



Top information gaps by segment



Incorrect responses were rated true except where indicated with *

Discussion

Implications for environmental advocacy

1. **Protect the base, but recognize changing priorities.** Progressive activists and Civic nationals remain a core environmental constituency, but economic security, affordability, and Canadian sovereignty matter to them, too. Environmental communications need to acknowledge these shared concerns.

2. **Develop a distinct strategy for New centrists.** The political middle has become more opinionated, conservative and economically oriented. New centrists remain within reach of advocates but don't mistake them for less committed environmentalists.

3. **Play an inside game.** Don't concede the nation-building narrative. Economic independence and major development resonate across audiences. Position environmental protection as part of building a stronger, resilient Canada, not as an alternative to it.

4. **Connect environmental priorities to what Canadians value:** natural landscapes, quality of life, democracy and long-term prosperity offer entry points for connecting environmental protection to national identity & shared concerns.

Stay tuned for next webinar

This discussion of updating the Five Canadas segmentation and describing distinguishing features of the moment Canadians are living in, sets the stage for the second part of this presentation.

Next up, after the Questions, we look closely at what the survey results say about delivering on the strategies mentioned in the previous slide.

We'll explore how attitudes to large-scale economic development are influenced by information about impacts of development, environmental safeguards and competing arguments.

And we'll look at useful strategic frames for communicators working in this changed context.

Questions?



ARIANA KAMINSKI VIA UNSPLASH

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