

# Canadian Views on Defence, Security, and Sovereignty:

Foundations and potential fault lines

Implementing Canada's Defence Industrial Strategy  
Canadian Global Affairs Institute

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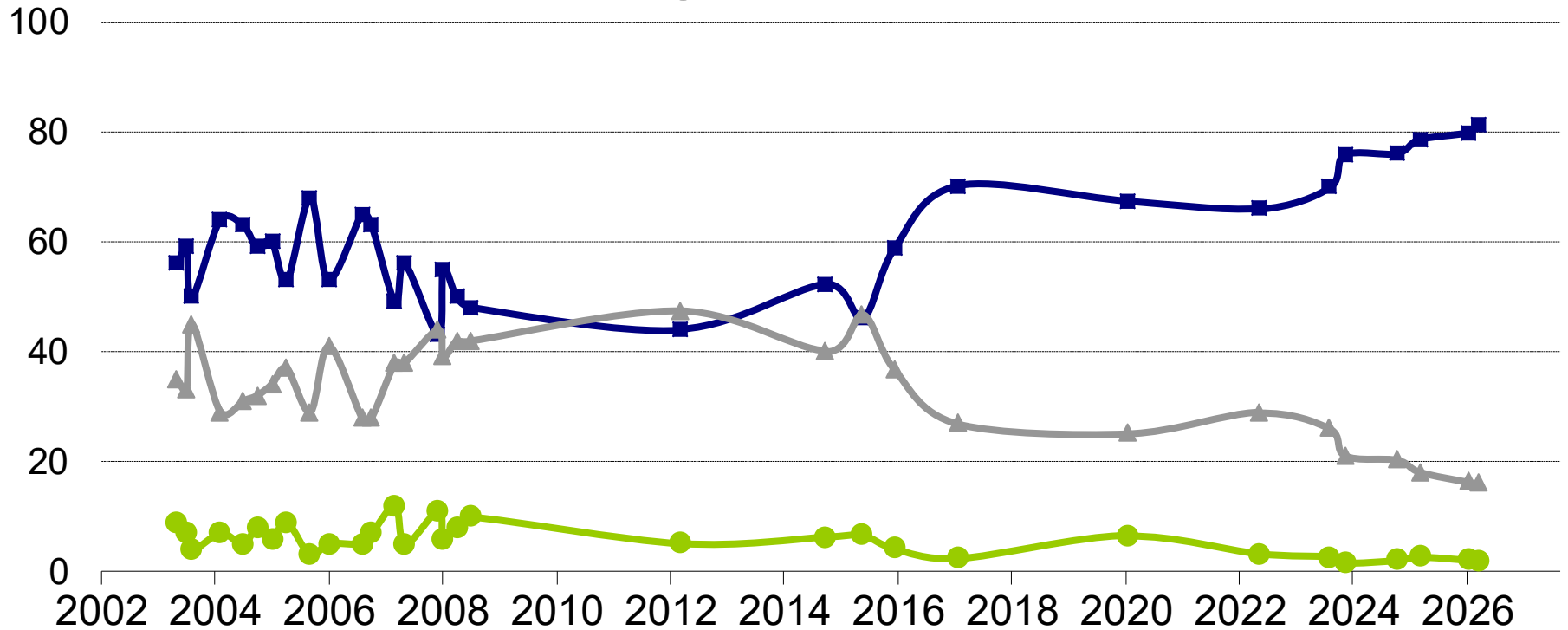


# Perceived danger in the world

- » In the past 18 months, Canada has transformed in ways that would have been unthinkable just a couple of years ago
  - Political landscape transformed dramatically in the period of one month (early 2025)
  - Propelled by twin forces of security and sovereignty
- » The perception that the world is growing more dangerous has never been higher
- » Threat perceptions not only elevated; they have also shifted in composition
  - Non-traditional threats such as cyberattacks, artificial intelligence, and economic coercion now rank above traditional military threats

# Perceived danger in the world

**Q.** From your own point of view, do you feel that, overall, the world is safer, more dangerous, or about the same as it was five years ago?



■ More dangerous

▲ About the same

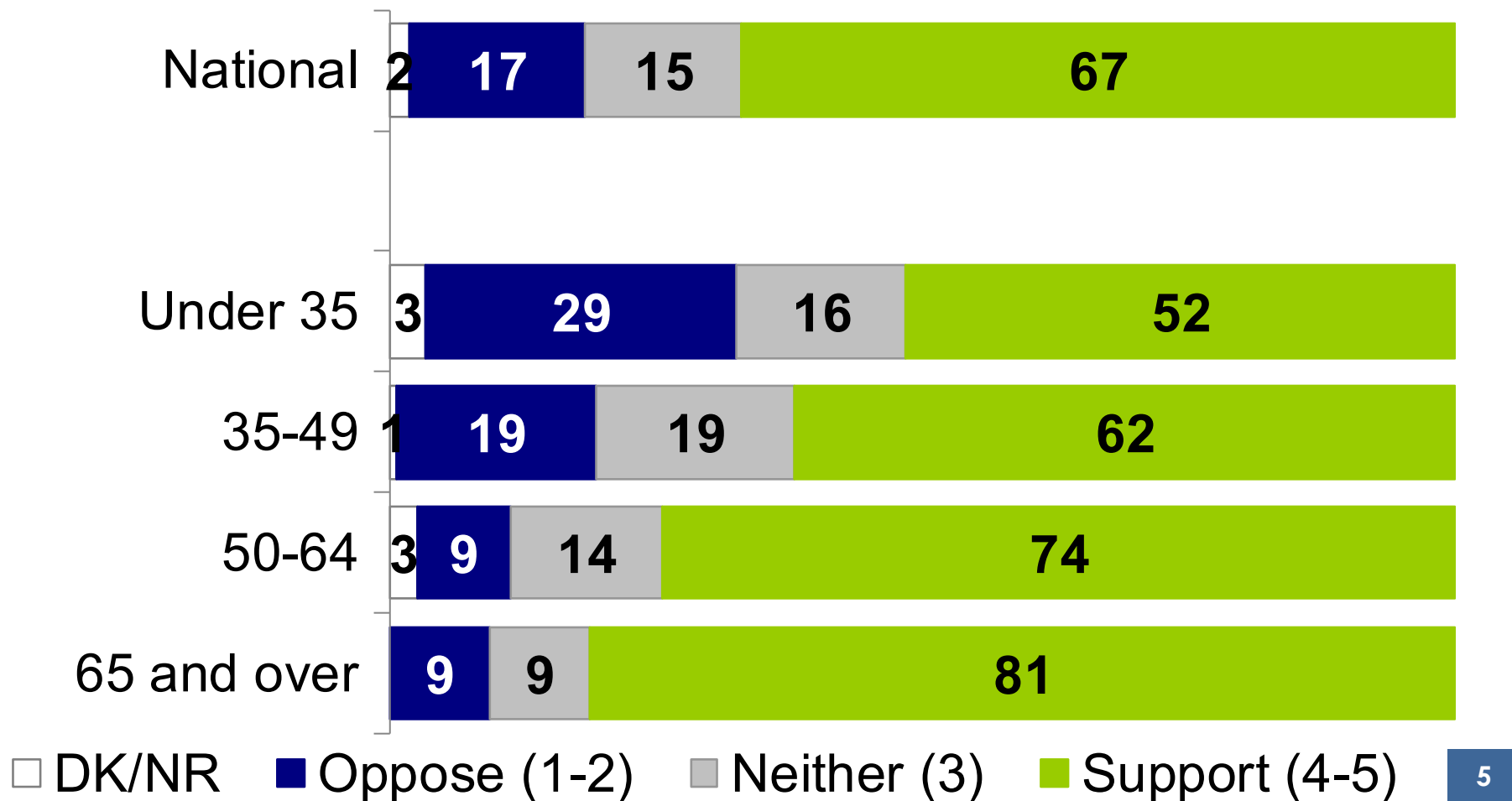
● Safer

# Views on defence spending

- » This new Canadian zeitgeist has boosted support for defence spending to previously unimaginable levels
  - Vast majority agree Canada has critical role in defence of both Arctic and North America
  - Three-quarters say growing the defence industry should be a top priority
  - By a 12-to-1 margin, Canadians say Canada should be spending more – not less – on its military
  - Two-thirds support the 5% spending target
- » Largely transcends partisan boundaries (though comparatively lower among NDP)
- » Support lower among youth and those of lower socioeconomic status

# Support for 5% spending target

**Q.** To what extent do you support or oppose the Government of Canada's commitment to spend 5% of GDP on defence by 2035?

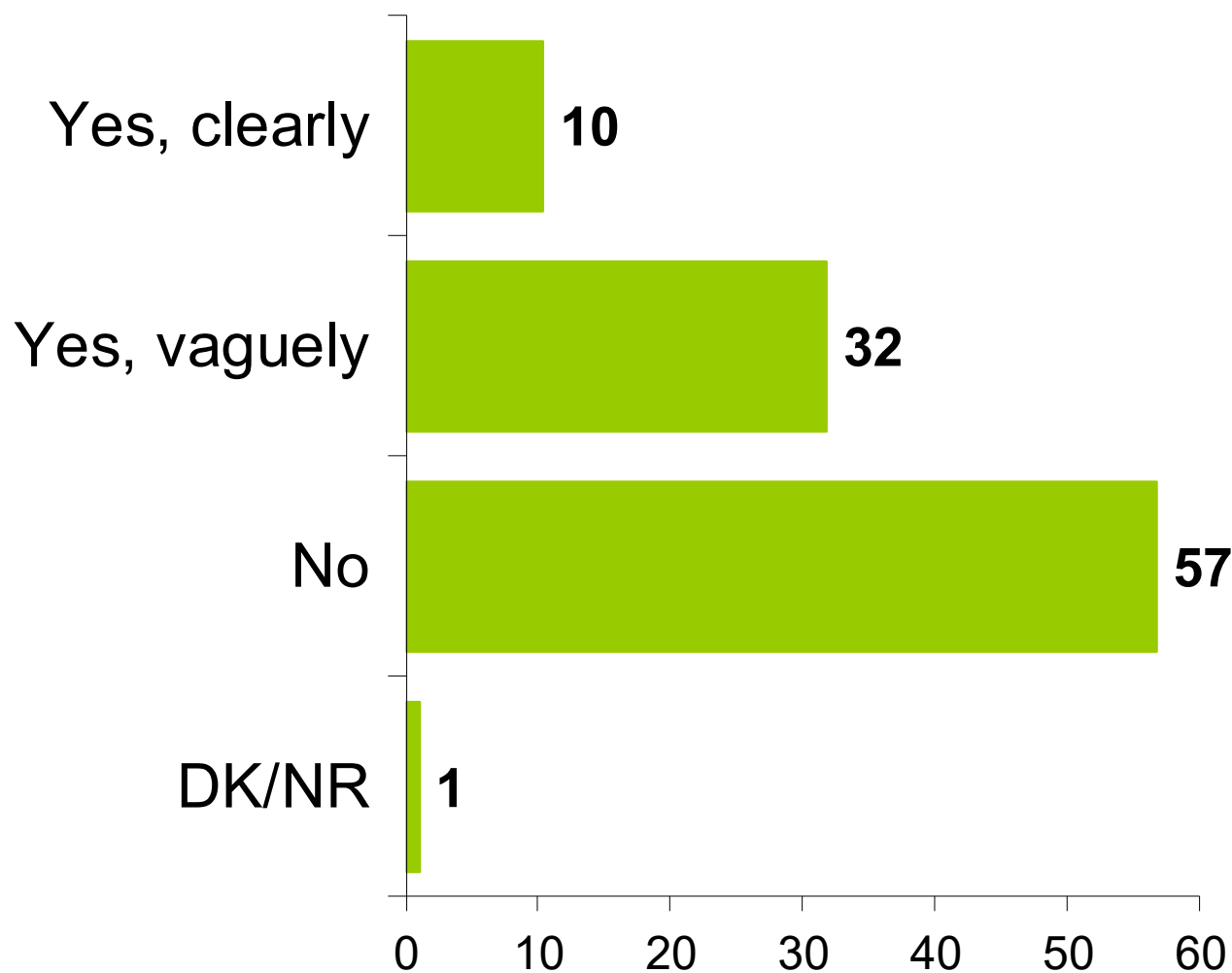


# Support for building key capabilities

- » Limited familiarity with Canada's Defence Industrial Strategy (loosely informed permission)
- » Broad support for increasing Canada's capacity to build all of the military capabilities tested, with armoured vehicles and fighter jets coming out as top priorities
  - AI weapons systems, meanwhile, rank last
  - We will need to watch this issue given the rapidity of advances in AI and the effectiveness of drones in conflicts such as Ukraine and Iran
- » Canadian perceptions of what kind of equipment needed grounded in 20<sup>th</sup>-century outlook on defence (will change)
- » Canadians broadly support arms exports to traditional allies, reject notion that arms sales to authoritarian regimes are necessary

# Familiarity with Defence Industrial Strategy

**Q.** Have you heard of the Defence Industrial Strategy?



# Perceptions of Canada's defence industry

- » By a two-to-one margin, Canadians hold a positive impression of Canada's defence industry
  - Positive impressions rise progressively with age
  - Impressions markedly improved from 2023
- » Overwhelming support for a strong, successful, and independent defence industry
  - Support consistently high across the political spectrum and across different demographic groups

# Importance of Canada's defence industry

**Q.** Please indicate whether you agree or disagree with each of the following statements:

For national security reasons, some defence technologies and services should be produced in Canada, for Canada



Canada should have a defence industry that is independent from the United States



Innovations in defence technology can benefit the rest of the economy



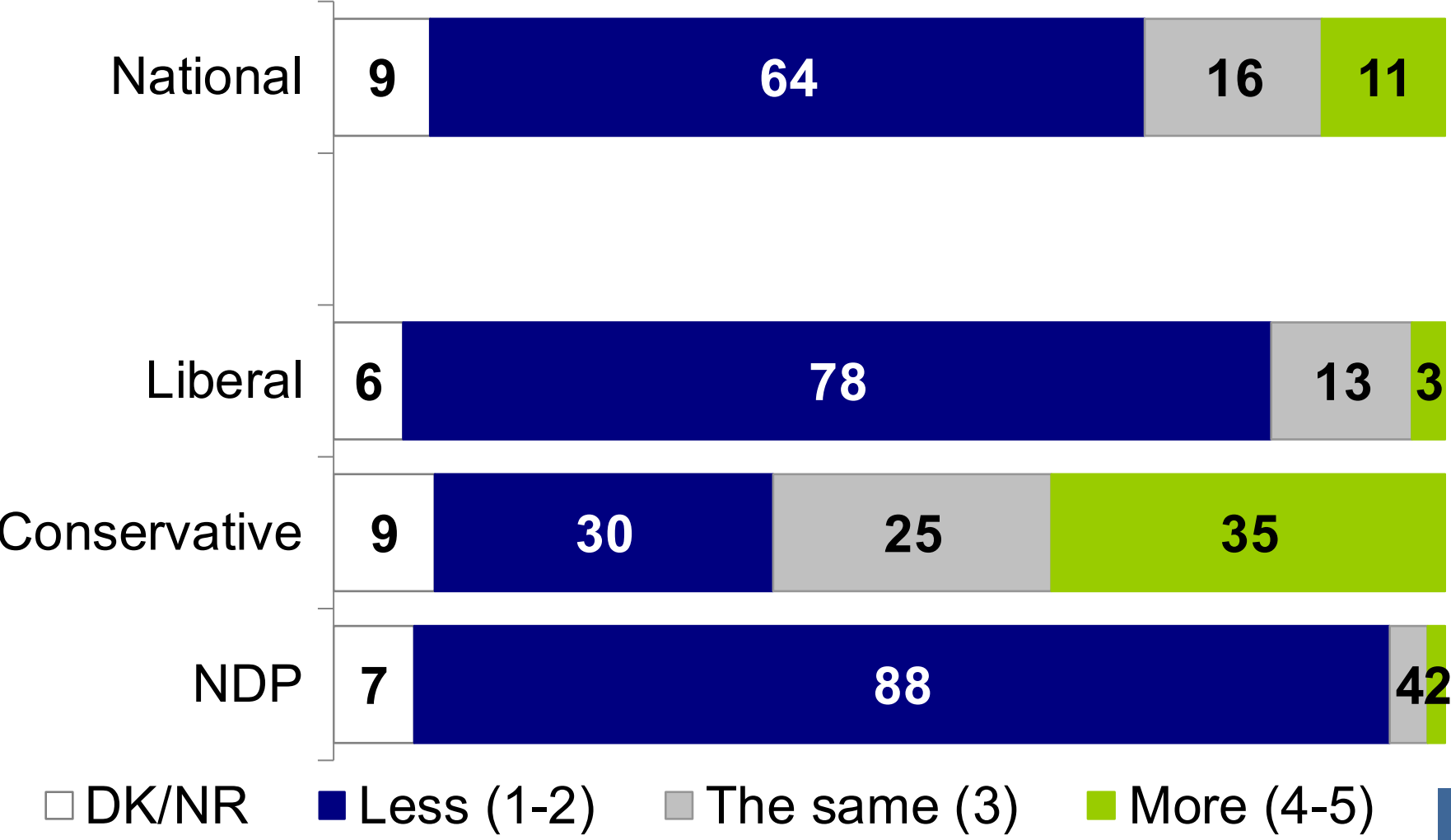
DK/NR    Somewhat/Strongly disagree    Somewhat/Strongly agree   **9**

# Attitudes to procurement

- » Strong support for strengthening Canada's military capacity and stockpiles, broad rejection of notion that cost should be primary consideration
- » The dominant belief is that Canada should be buying less military equipment from the United States
  - Results split along partisan lines
- » Most Canadians see U.S. military technology as superior, but unsure about comparative costs
- » Canada want made-in-Canada approach
  - Receptivity to deals with other countries, particularly Europe/South Korea

# Preferred level of procurement from U.S.

**Q.** Do you believe Canada should buy less, the same amount, or more military equipment from the U.S.?



# Canada-U.S. rupture

- » Outlook on U.S. administration overwhelmingly negative
  - Results split along partisan lines
- » Majority of Canadians now view U.S. as a strategic competitor, rather than an ally
  - Shockingly, one-quarter would describe U.S. as adversary
- » Canadians divided on whether this rupture is permanent
  - Views heavily divided by disinformation and partisanship
- » Canadians may be overestimating permanence of this rupture
  - Could be shaped by economic downturn, change in U.S. political landscape, or a unified threat (China, Russia, etc.)

# Characterization of Canada-U.S. relations

**Q.** Which of the following best reflects your view on what the US is to Canada?



# Conclusions (i)

- » World has never been seen as more dangerous, alliance with U.S. “ruptured”
  - Canadians responding with strong support for a more robust defence industry
- » Canadians do not believe the country is well-equipped to meet its core defence obligations
- » Broad, cross-partisan mandate for increased defence spending and expanded domestic production, driven by concerns over security and sovereignty
  - Arctic security particularly salient issue
  - Support higher among older, affluent Canada
  - Fault lines across disinformation and generation could challenge current consensus

# Conclusions (ii)

- » Rising concern with foreign interference/artificial intelligence
  - Opportunity for defence industry?
- » Canadians overwhelmingly support prioritizing Canadian-made equipment, reducing dependence on U.S.
  - Defence expenditures likely to land better when framed as reducing reliance on foreign suppliers
  - Canadians reject cost as a primary consideration, meaning governments have latitude to prioritize domestic capacity
- » Federal government is operating with a permissive but uninformed public

# Conclusions (iii)

- » Threats to defence consensus include:
  - Generational fault lines
  - Economic trajectory (positive or negative?)
  - Incipient and largely orphaned progressive populist segment (positioning defence as reduced reliance on U.S. potential inroad)
  - Major shift in U.S. trajectory in midterms
  - Real-world questions of how to pay for this (support overwhelmingly leans to “tax anyone but me” mentality)
- » Public will expect clear, timely evidence of roll-out/tangible economic benefits



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