Léger-Datagotchi

Report on Coffee-Transport Dynamics

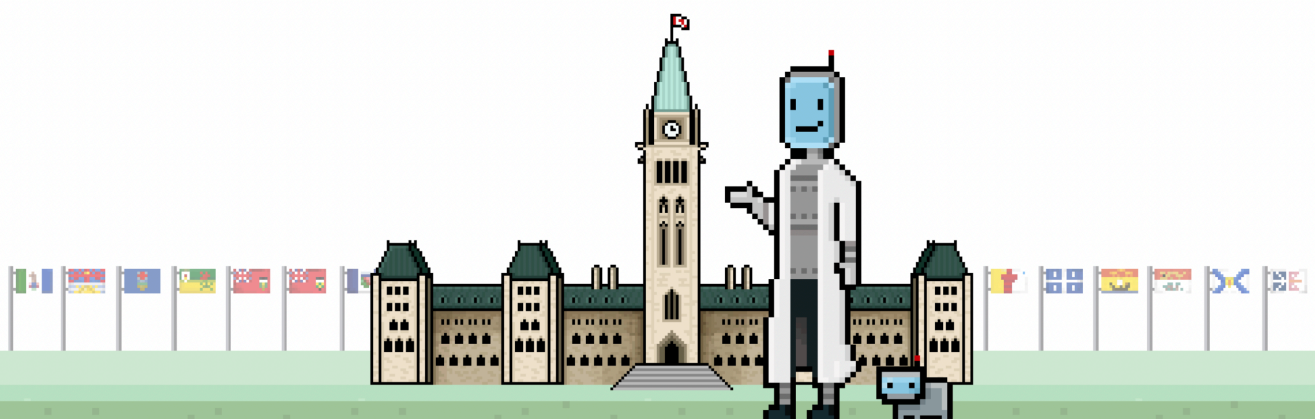**Leger**

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The Coffee Battle in Canada

The map illustrates the regional dominance of coffee chains across Canada, revealing a significant geographic divide. Tim Hortons largely dominates in rural regions and in the eastern part of the country, affirming its status as a national symbol with more than 60% of electoral districts under its influence. Conversely, Starbucks is mainly established in major urban centers such as Vancouver and certain parts of Toronto, demonstrating an urban-rural divide in consumer preferences. McDonald's, on the other hand, finds its strongholds in intermediate zones and certain suburbs, reflecting a positioning strategy between the two other giants.
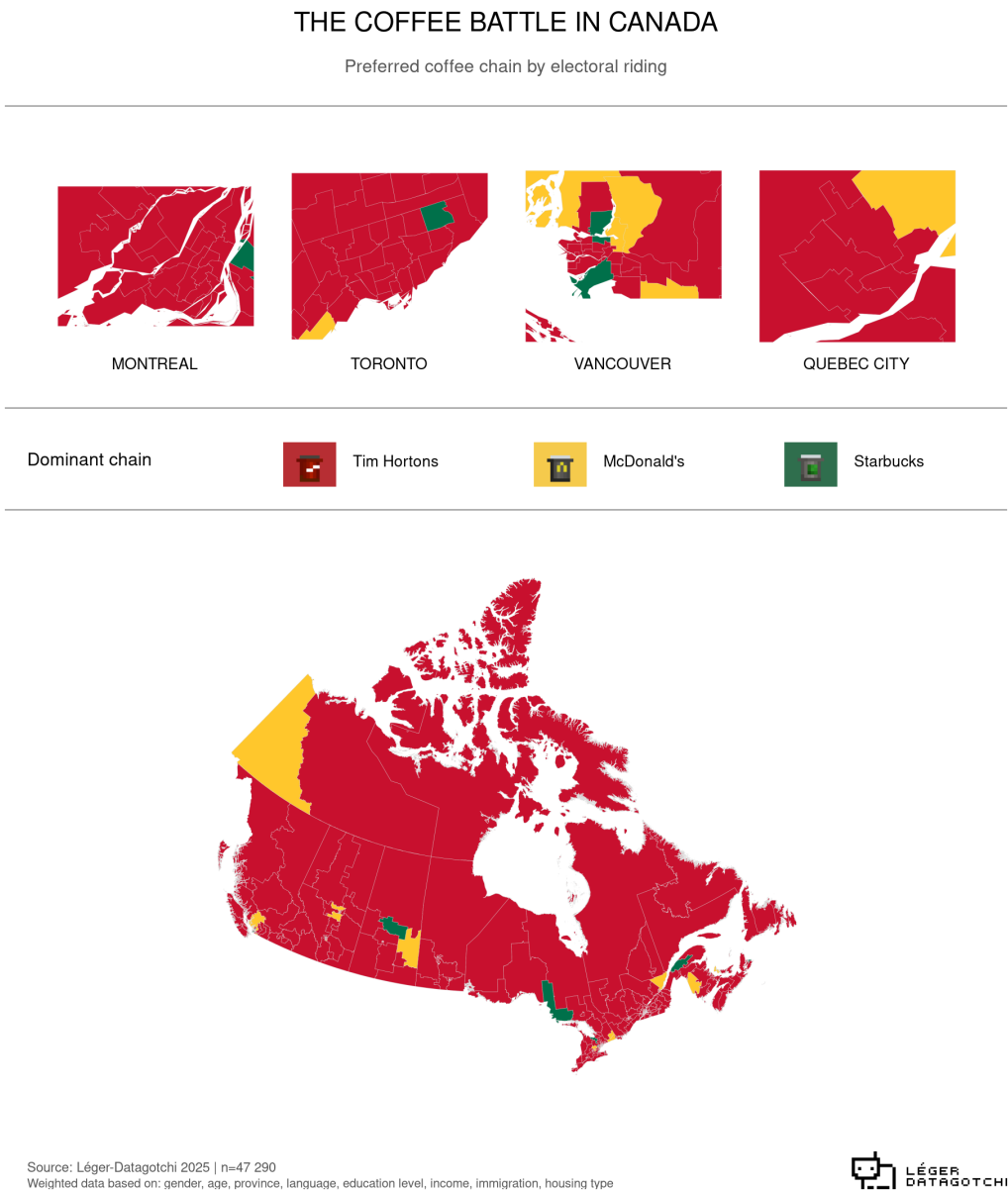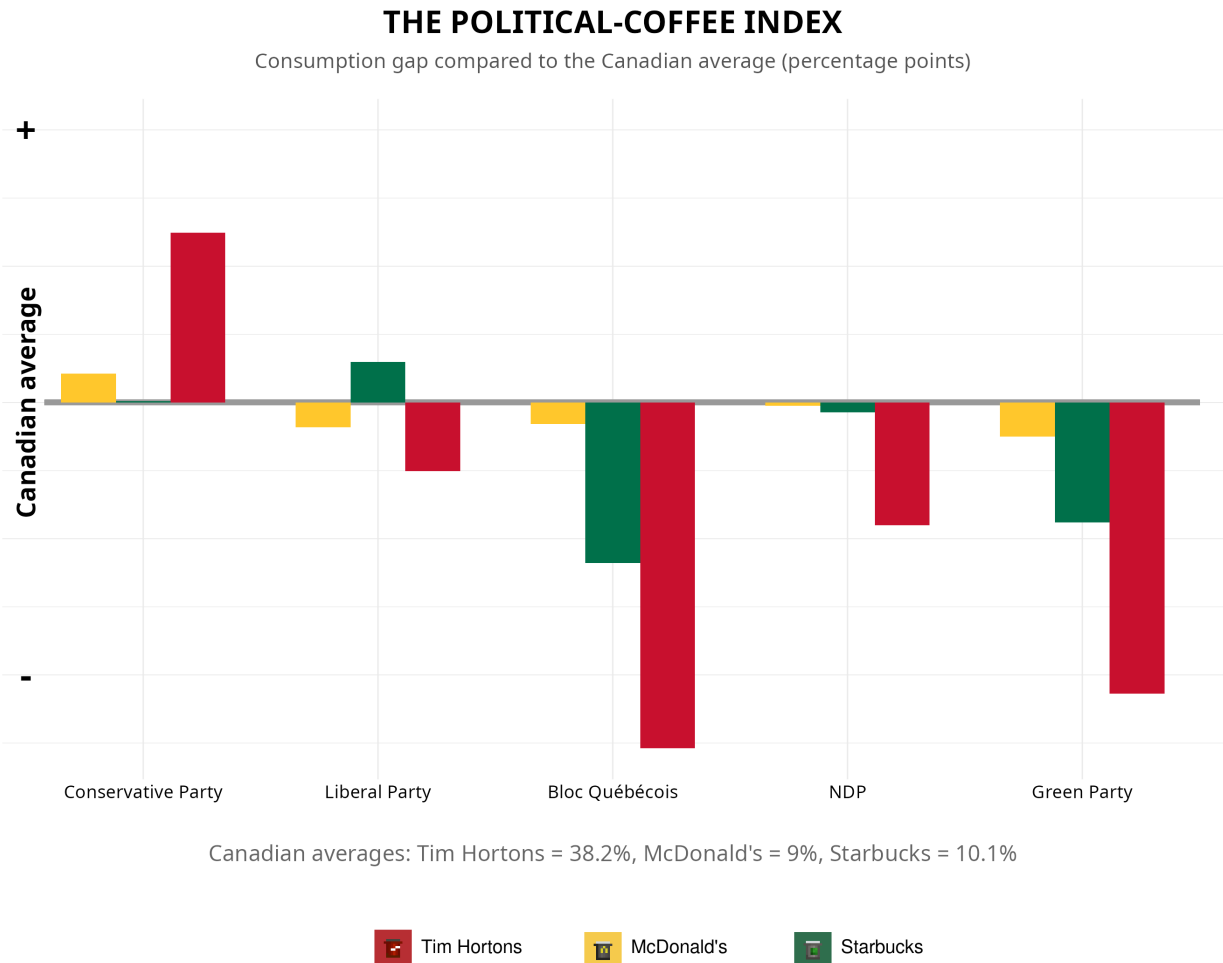

FIGURE 1 – The Coffee Battle in Canada

The Coffee-Politics Index

The coffee-politics index graph reveals a fascinating correlation between partisan preferences and coffee consumption habits. Conservative voters display a marked affinity for Tim Hortons (+8.2 points above the national average), illustrating the symbolic attachment to traditional Canadian values that this chain represents. In contrast, supporters of progressive parties such as the NDP and the Green Party show a significant preference for Starbucks (respectively +4.6 and +5.9 points), a chain associated with a more cosmopolitan image. The Bloc Québécois presents a distinct profile with above-average McDonald's consumption, which could reflect Quebec's cultural particularities. This distribution reveals how everyday consumption choices surprisingly align with political values, transforming coffee into a marker of social identity in Canada.

THE POLITICAL-COFFEE INDEX

Consumption gap compared to the Canadian average (percentage points)

Canadian averages: Tim Hortons = 38.2%, McDonald's = 9%, Starbucks = 10.1%

■ Tim Hortons   ■ McDonald's   ■ Starbucks

Source: Léger-Datagotchi 2025 | n=47 290
Weighted data based on: gender, age, province, language, education level, income, immigration, housing type

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FIGURE 2 – Coffee-Politics Index

The graph presents coffee consumption by political affiliation across three different chains, with distinct vertical scales for each chain. For Tim Hortons (scale from 0% to 50%), CPC supporters are the largest consumers (about 44%), followed by the LPC (about 36%), the NDP (about 33%), the Green Party (about 27%), and finally the BQ which shows the lowest consumption (about 25%). For McDonald's (scale from 0% to 20%), the distribution is more uniform across parties. The CPC comes slightly ahead (about 10%),

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followed by the NDP (about 7-8%), then the BQ and the LPC at similar levels (about 6-7%), and finally the Green Party (about 5-6%). For Starbucks (scale from 0% to 10%), the LPC clearly dominates (about 38%), followed by the NDP (about 32%), the CPC (about 30%), the Green Party (about 19%), and finally the BQ which shows the lowest consumption (about 14%).
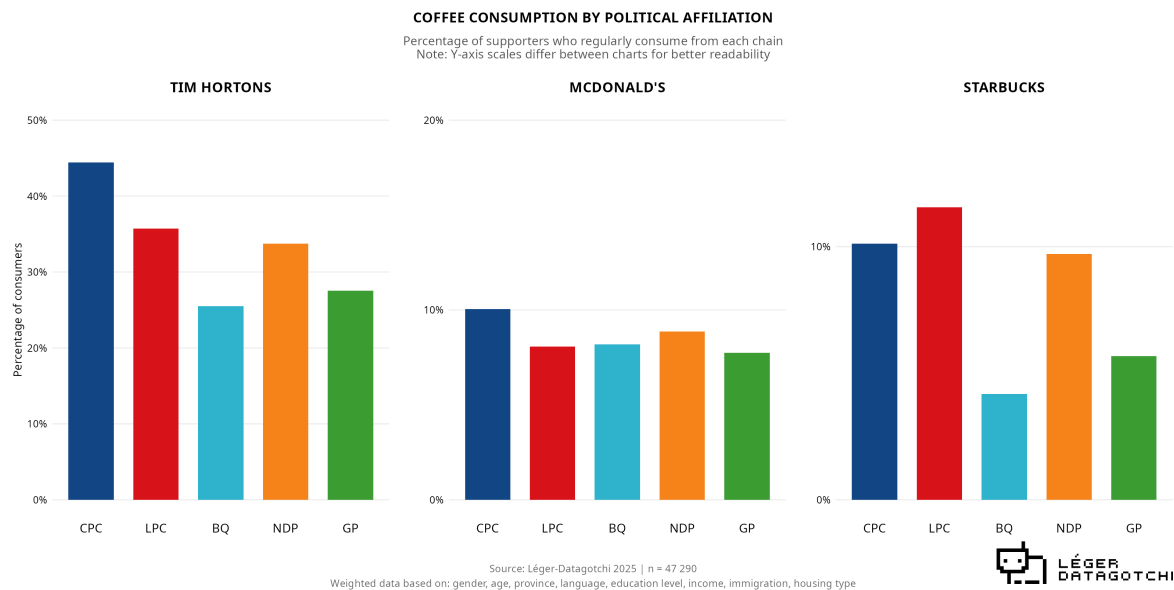
COFFEE CONSUMPTION BY POLITICAL AFFILIATION
Percentage of supporters who regularly consume from each chain
Note: Y-axis scales differ between charts for better readability

Source: Léger-Datagotchi 2025 | n = 47 290
Weighted data based on: gender, age, province, language, education level, income, immigration, housing type

FIGURE 3 – Coffee-Politics Index (Triple Analysis)

The Transport Battle in Canada

This map illustrates the regional dominance of transportation modes across Canada, revealing a significant geographic divide. Cars predominantly dominate in rural regions and in the eastern part of the country, affirming their status as the primary means of transportation with the majority of electoral districts under their influence, represented in blue on the map. Conversely, public transportation is mainly established in major urban centers such as Toronto and certain parts of Montreal and Vancouver, demonstrating an urban-rural divide in travel preferences. Motorcycles, meanwhile, find their strongholds in the northern part of the country, particularly in territories such as Nunavut and the Northwest Territories, perhaps reflecting specific regional preferences or geographic constraints. There are also some areas where walking (in yellow) is the dominant mode, particularly visible in certain parts of Vancouver and Manitoba, while SUVs (in red) are preferred in certain regions of Quebec, notably in western Montreal.

TRANSPORTATION BATTLE IN CANADA

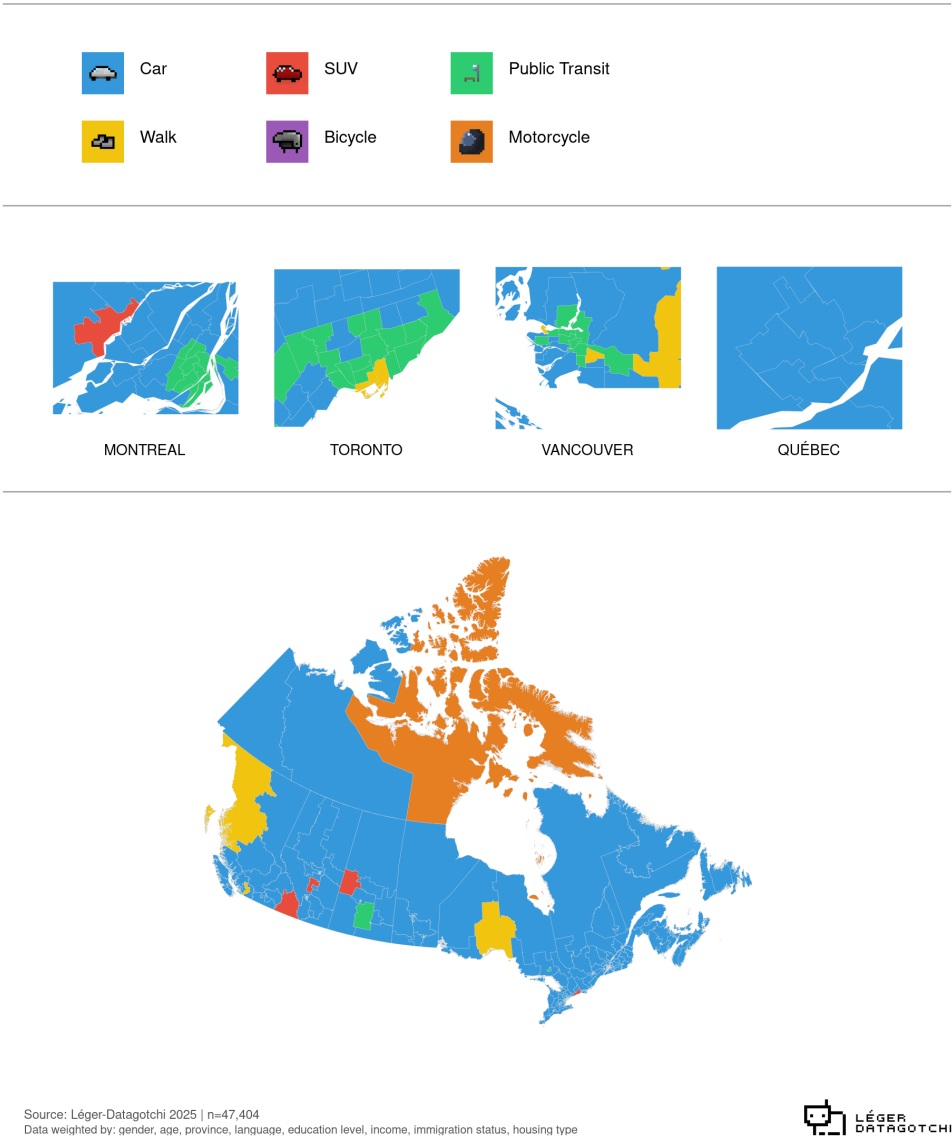Preferred transportation mode by electoral district

FIGURE 4 – The Transport Battle in Canada

The Transport-Politics Index

This graph illustrates the relationship between transportation preferences and political affiliations in Canada, revealing significant ideological divides. The Conservative Party seems to show an overrepresentation of car drivers compared to the national average, while underrepresenting public transportation users and pedestrians. Conversely, the Bloc Québécois seems to present a deficit of public transportation users, offset by a slight overrepresentation of car and SUV drivers, perhaps reflecting the specific geographic realities of Quebec. The NDP and the Green Party, meanwhile, seem to attract more pedestrians and cyclists, with an underrepresentation of car drivers in the NDP. The national average indicates that cars remain dominant (47%), followed by public transportation (24.8%) and walking (13.8%).

TRANSPORT-POLITICAL INDEX

Deviation from national average transportation preference (% points)

National averages: Car = 47%, SUV = 10.5%, Public Transit = 24.8%, Walking = 13.8%, Bicycle = 2.4%, Motorcycle = 1.6%

Legend:
- Car
- SUV
- Public Transit
- Walk
- Bicycle
- Motorcycle

Source: Léger-Datagotchi 2025 | n=47,404
Data weighted by: gender, age, province, language, education level, income, immigration status, housing type
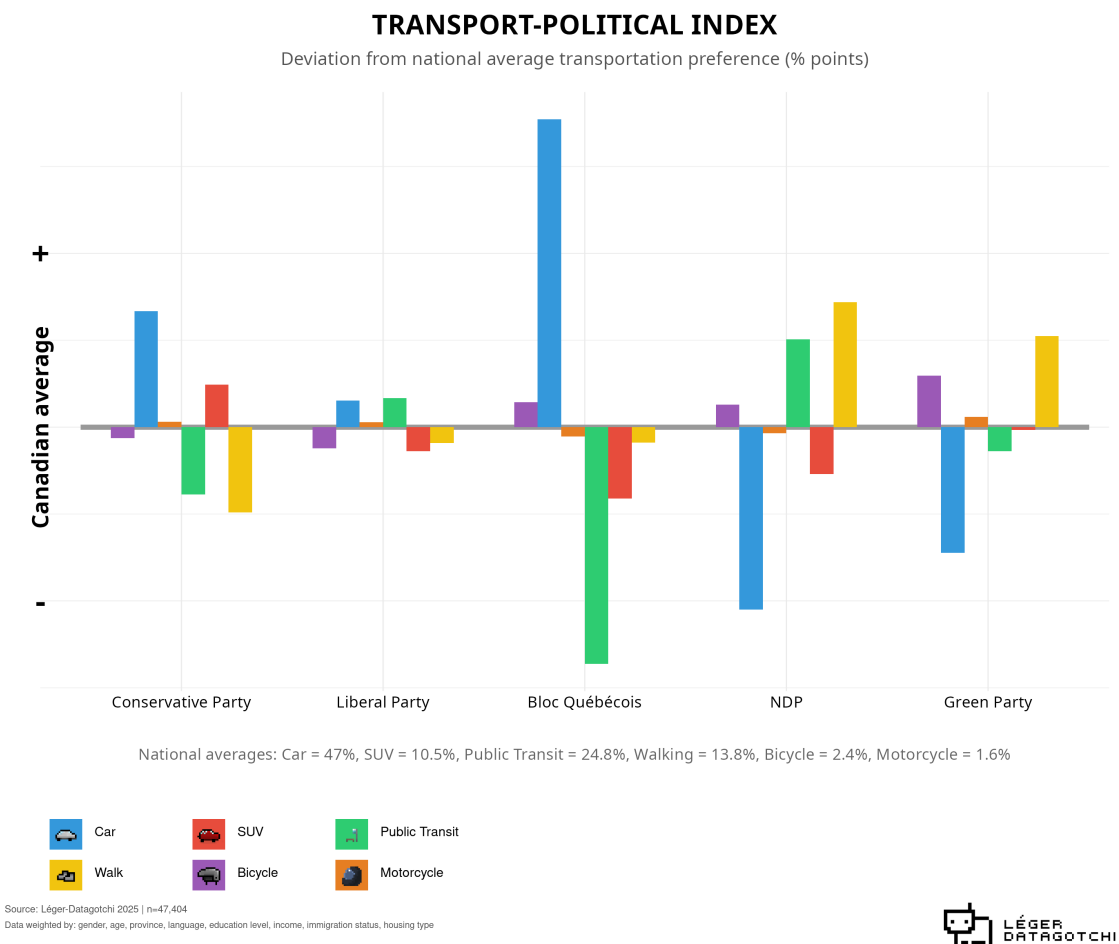
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FIGURE 5 – Transport-Politics Index

The graph shows that BQ (Bloc Québécois) voters are the most car-dependent (about 65%), followed by the CPC (Conservative Party) at about 53% and the LPC (Liberal Party) at 47%. The NDP and the Green Party have higher rates of public transportation use (about 30% and 23% respectively) compared to other parties. For walking, the NDP stands out with about 21% of its voters, while Green Party voters are the most numerous to use bicycles (about 5%). Motorcycle use remains marginal (less than 5%) for all parties.

TRANSPORTATION MODES USED BY POLITICAL PARTY

Percentage of voters from each party using different transportation modes

Source: Léger-Datagotchi 2025 | n=40 180
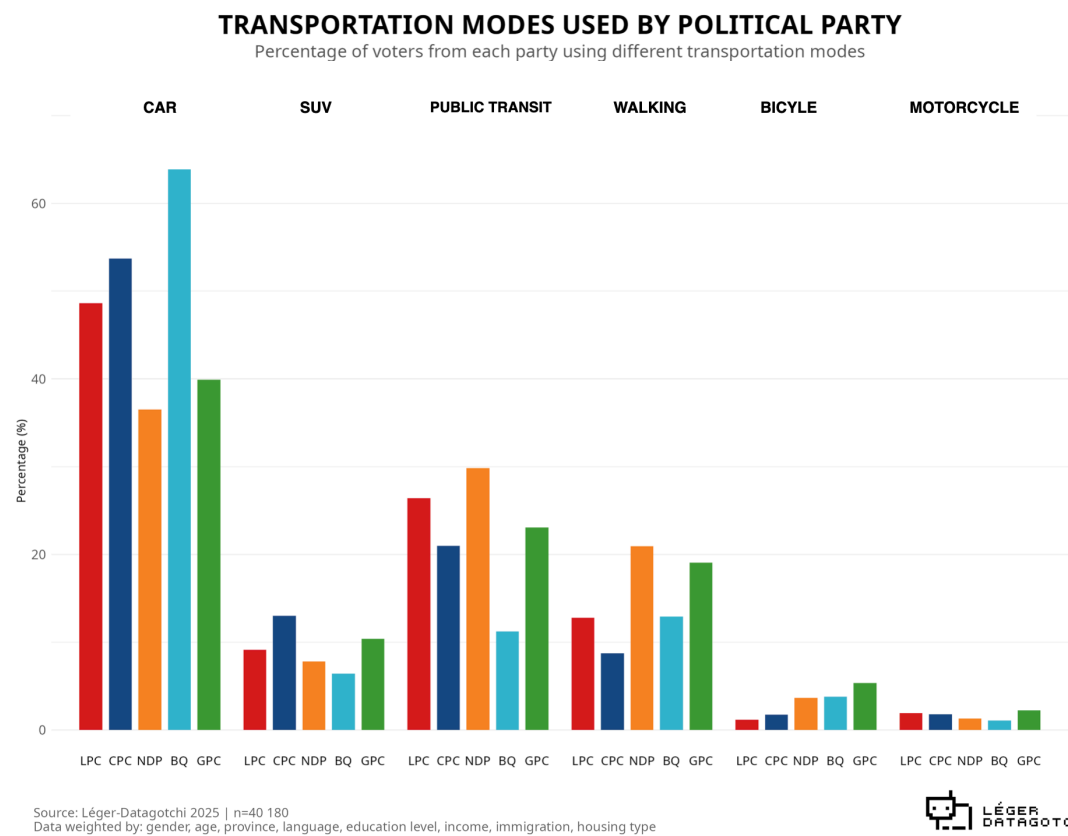Data weighted by: gender, age, province, language, education level, income, immigration, housing type

FIGURE 6 – Transport-Politics (Detailed Version)