



Canada This Month Pipelines

Public Opinion Research
Release Date: October 24th
Field Dates: October 6th to 13th, 2025

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Key Findings

1

Over half of Canadians (54%) support building new pipelines in their provinces; this support has increased by 20 points since 2016. Similarly, 51% support Danielle Smith's proposal to build a new pipeline going from Alberta across the north coast of BC.

2

More than half (55%) of British Columbians support building a new oil pipeline in their province. This is above Quebec (39%) but well below support for pipelines in Alberta (71%) and the Prairies (63%). Whether it is a general reference to transporting oil or a specific mention of building a pipeline in your province, support remains above 55% across all provinces except Quebec (39%). Support slightly drops across all provinces, even in Alberta (by 5 points), when Danielle Smith's proposal is explicitly mentioned.

3

Support varies by political identity and value clusters. Populist (82%) and Deferential Conservatives (70%) express the highest support for new pipelines. This support drops among Pay-as-you-go Moderates (51%) and among Left Liberals (47%). Core Left respondents are the most opposed. These divisions are consistent across multiple pipeline questions.

4

More pragmatic attitudes, captured in concerns about the economy and affordability, are overshadowing environmental issues. The environment, which ranked fourth among Canadians' most important issues in August '24, has fallen to eighth place in October '25, far behind the cost of living, housing, and health care.

5

Public reactions vary depending on who endorses a pipeline. Prime Minister Mark Carney's (38%) and 'Your Provincial Premier's' (39%) support have the most substantial effect and slightly less if it is Pierre Poilievre's support (34%). The likelihood to support if the 'Provincial Premier' supports is highest in Alberta and lowest in Quebec.

Segmentations

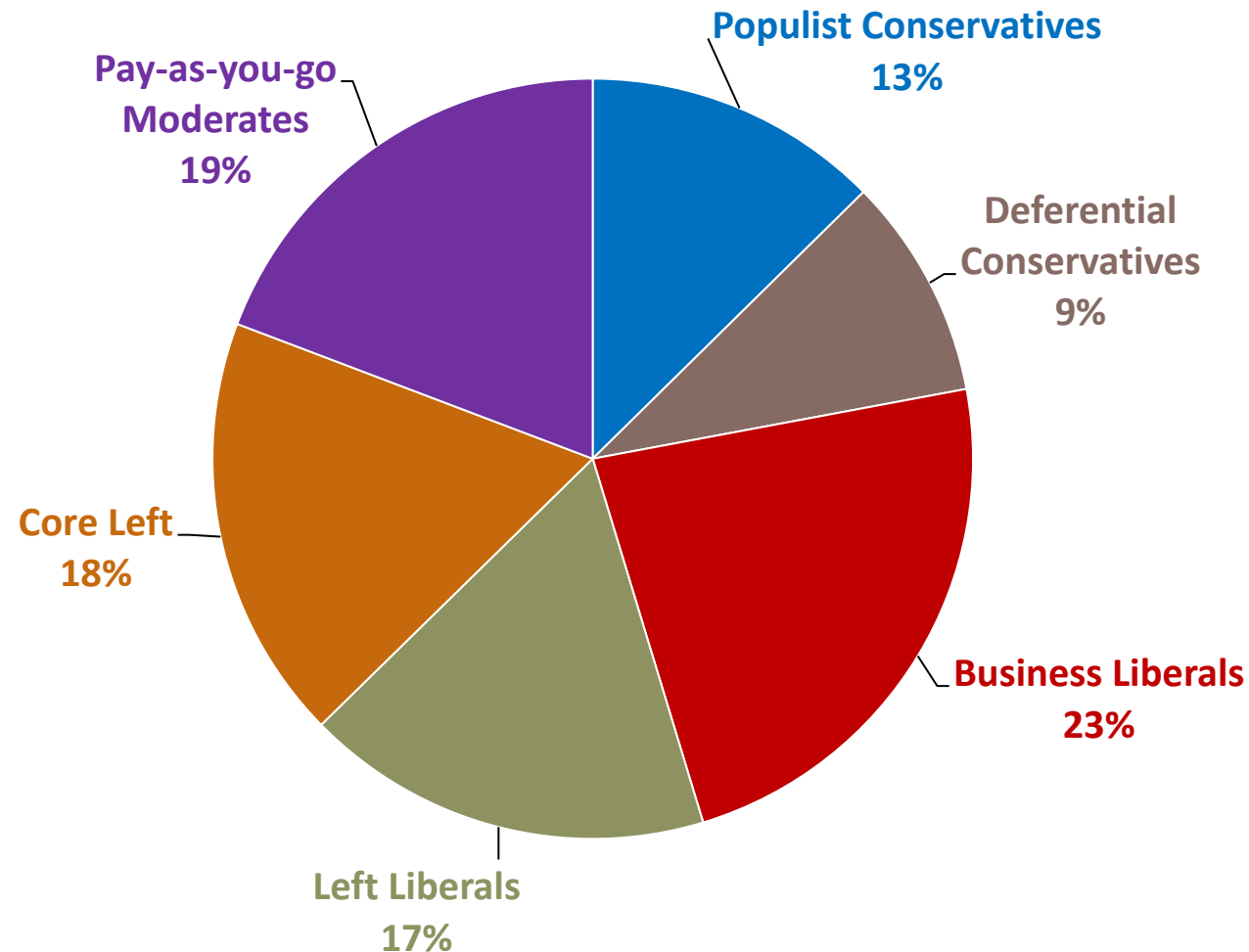
Value Clusters

Value Clusters: Nearly 1-in-4 Canadians are Business Liberals, while almost 1-in-5 are Pay-as-you-go Moderates

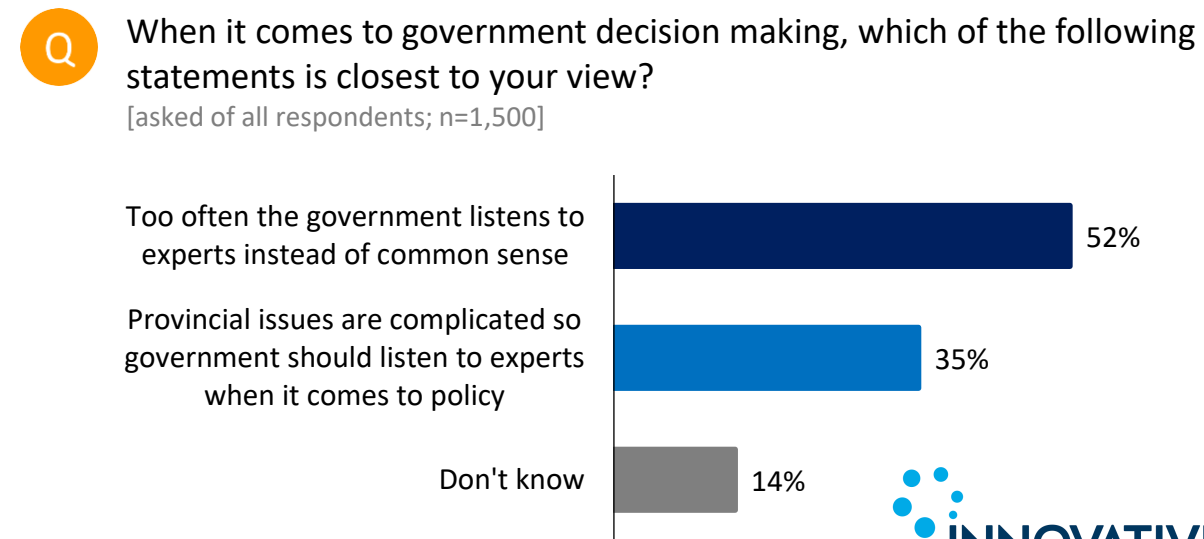
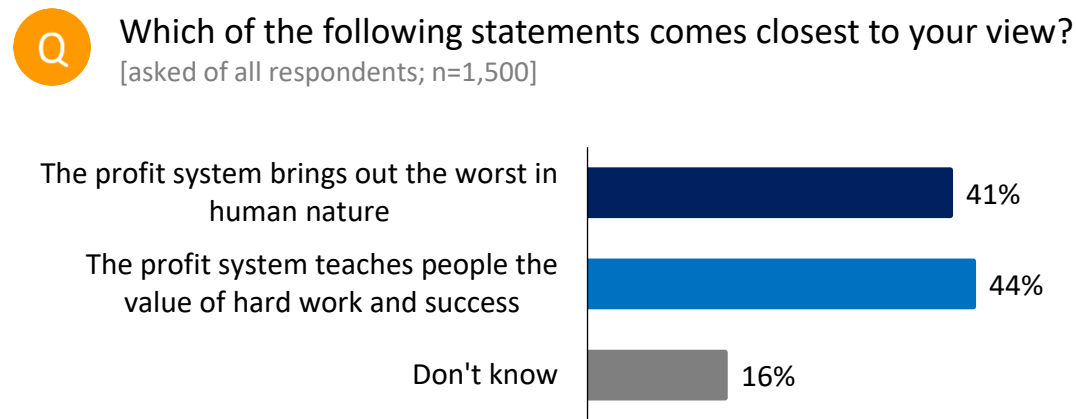
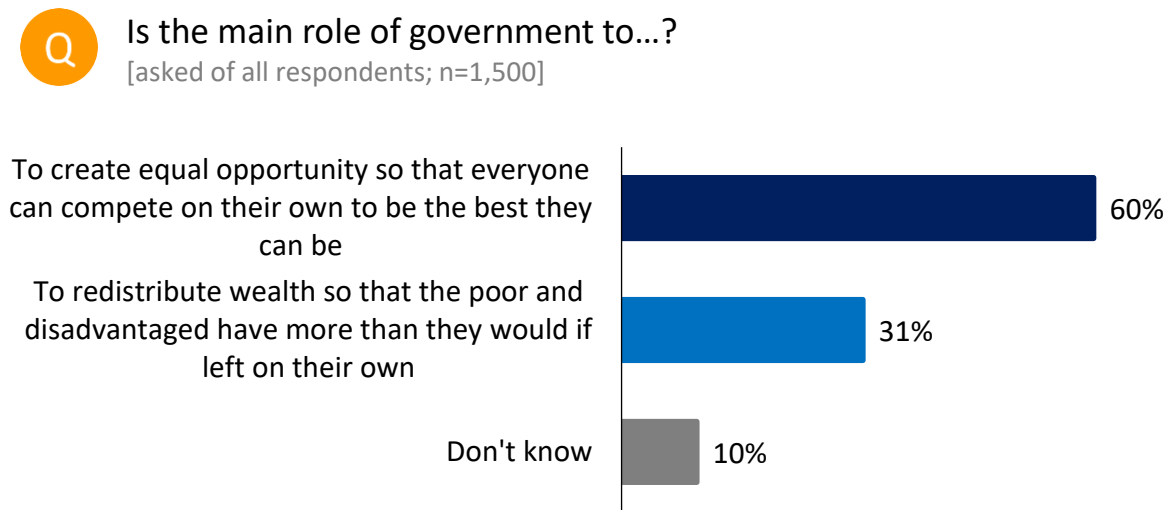
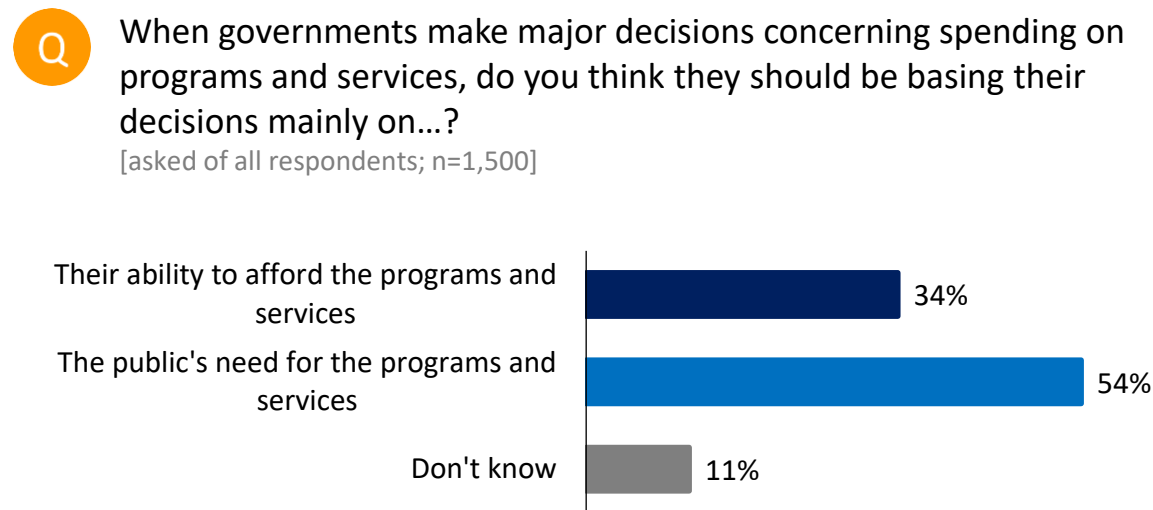


Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

[asked of all respondents; n=3,000]



Core Political Values: 3-in-5 think the main role of govt is to create equal opportunity, and 54% think spending should be needs-based



Defining Value Clusters: Business Liberals think spending should be needs-based, while Pay-as-you-go Moderates prioritize ability to afford

Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
Governments should base decisions on...	Ability to afford	93%	90%	0%	0%	0%	73%
	Public Need	0%	0%	96%	87%	94%	0%
Is the main role of government to...?	Create equal opportunity	99%	76%	71%	97%	0%	35%
	Redistribute wealth	0%	18%	22%	0%	95%	33%
When it comes to government decision making...	Rely on common sense	100%	0%	45%	58%	49%	51%
	Listen to experts	0%	89%	45%	27%	41%	19%
The profit system...	Brings out the worst in human nature	0%	0%	0%	81%	83%	61%
	Teaches value of hard work and success	92%	93%	93%	0%	0%	8%

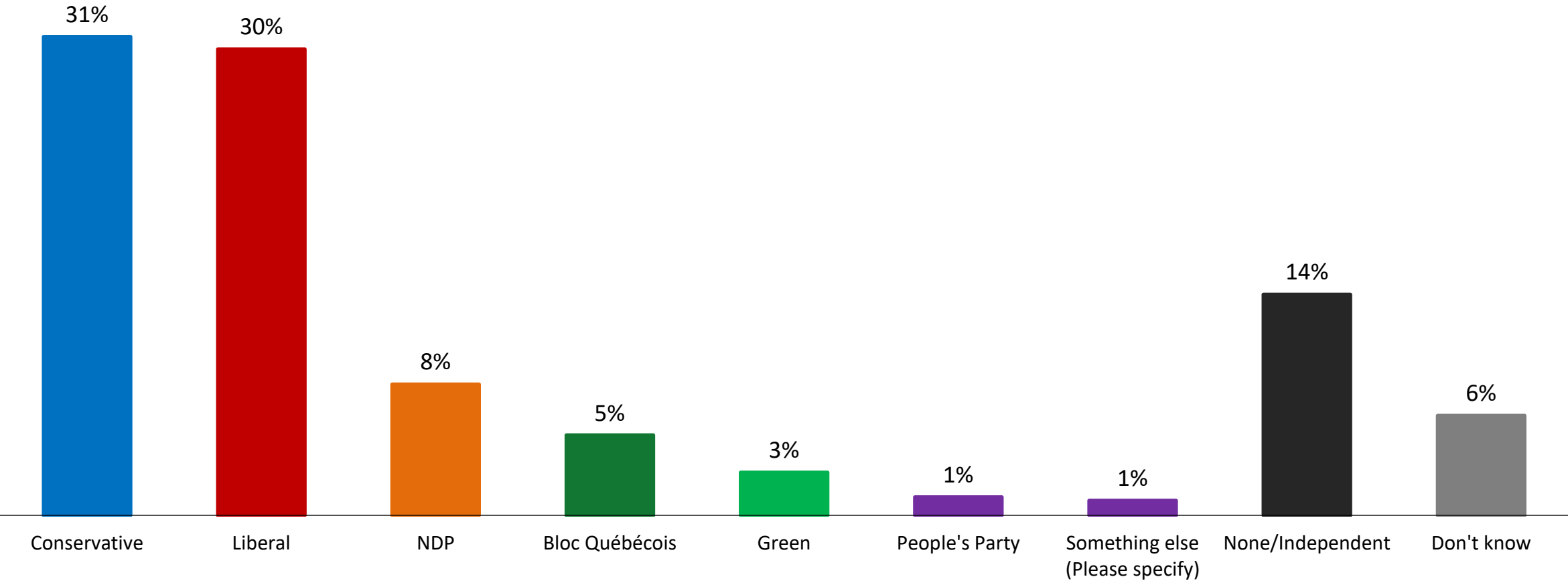
Note: Current data: October 2025

Party ID

Federal Party ID: Most Canadians identify as conservatives (31%) and liberals (30%)



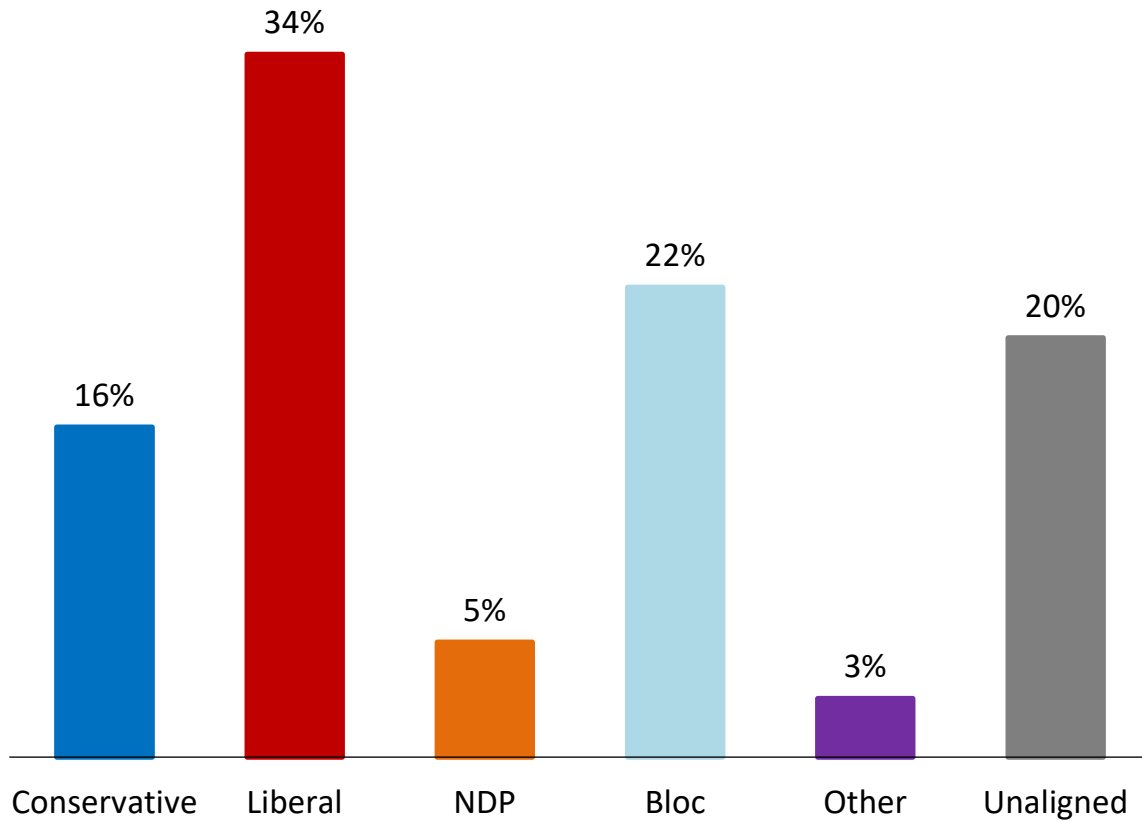
Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[asked of all respondents; n=1500]



Federal Party ID (QC vs. ROC): In QC more identify as liberals than Bloc (12-point lead). In the ROC more identify as conservatives than as liberals

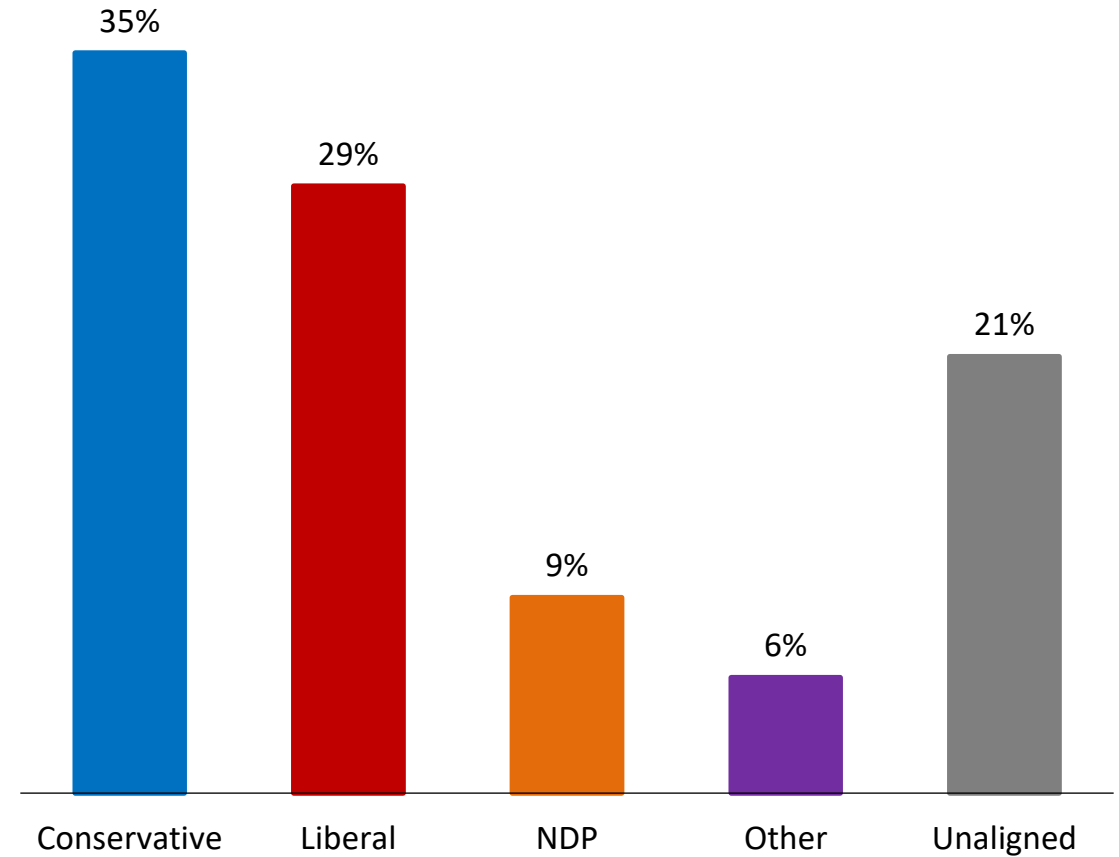
Party ID: Quebec

[Respondents in Quebec; n=345]



Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1155]



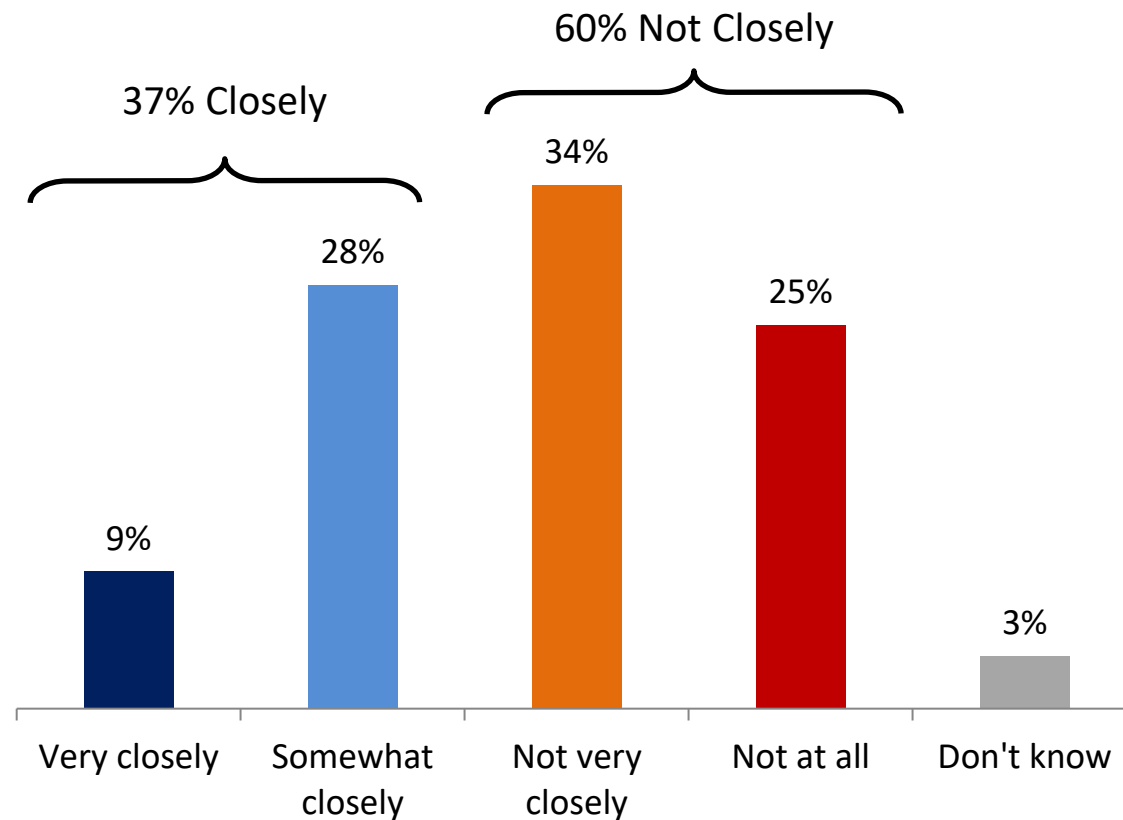
Oil Access

New Oil Pipelines: Only 37% have been following the debate closely, while 60% have not been keeping up with the debate



How closely have you been following the debate over the construction of new oil pipelines in Canada?

[asked of all respondents, n=1,500]



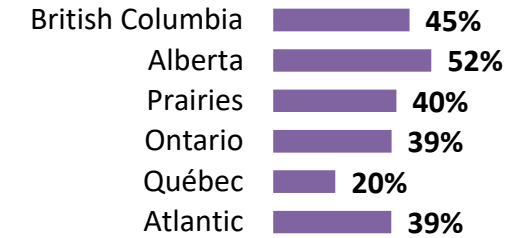
Segmentation: Sep. '25

Respondents who say 'Closely'

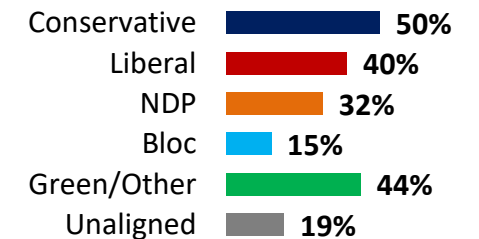
Age



Region



Federal Party ID



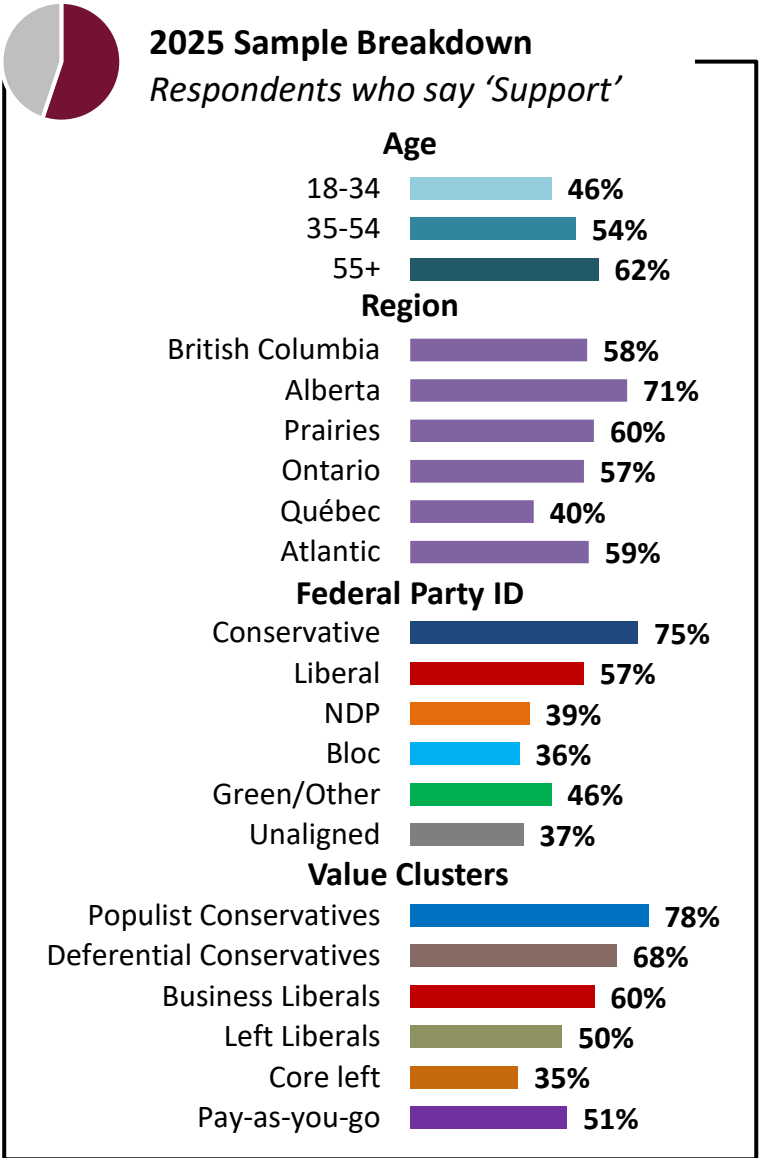
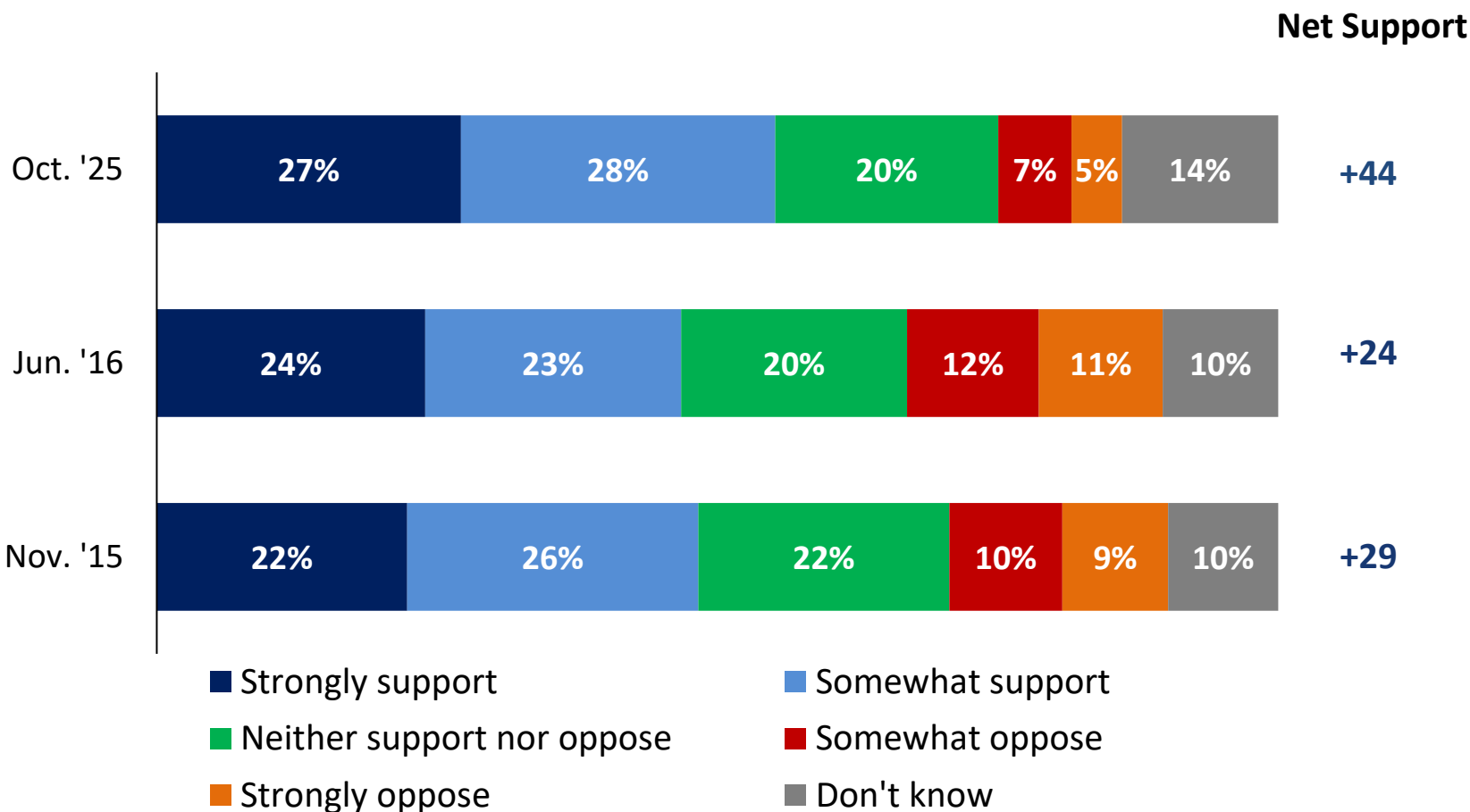
Value Clusters



Support for Transporting Oil: Net support has increased 20 points since 2016; highest support among Conservatives and those aged 55+

Q Do you support or oppose creating new ways of transporting Western Canadian oil to international markets?

[asked of all respondents, n=1,500]

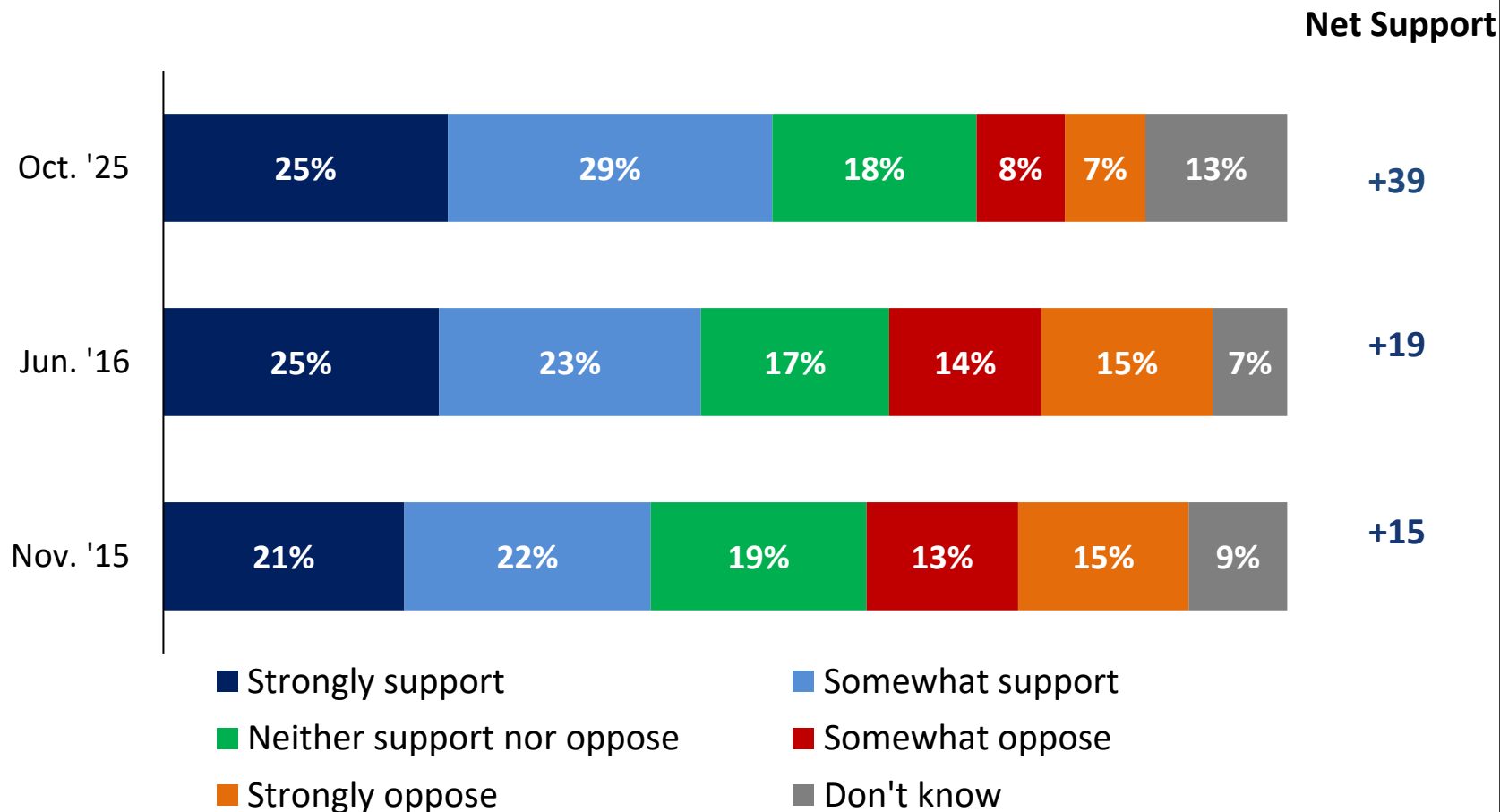


Support for New Pipelines: Net support for new oil pipelines in provinces has increased 20 points since 2016, with Conservatives much more likely to support

Q

One option for transporting Western Canadian oil to international markets is building new pipelines. Generally speaking, would you support or oppose a proposal to build a new oil pipeline in your province?

[asked of all respondents, n=1,500]



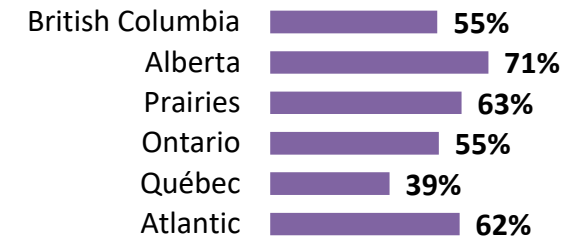
2025 Sample Breakdown

Respondents who say 'Support'

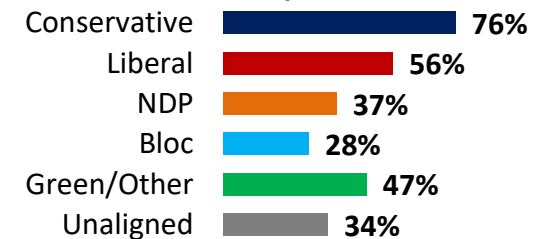
Age



Region



Federal Party ID

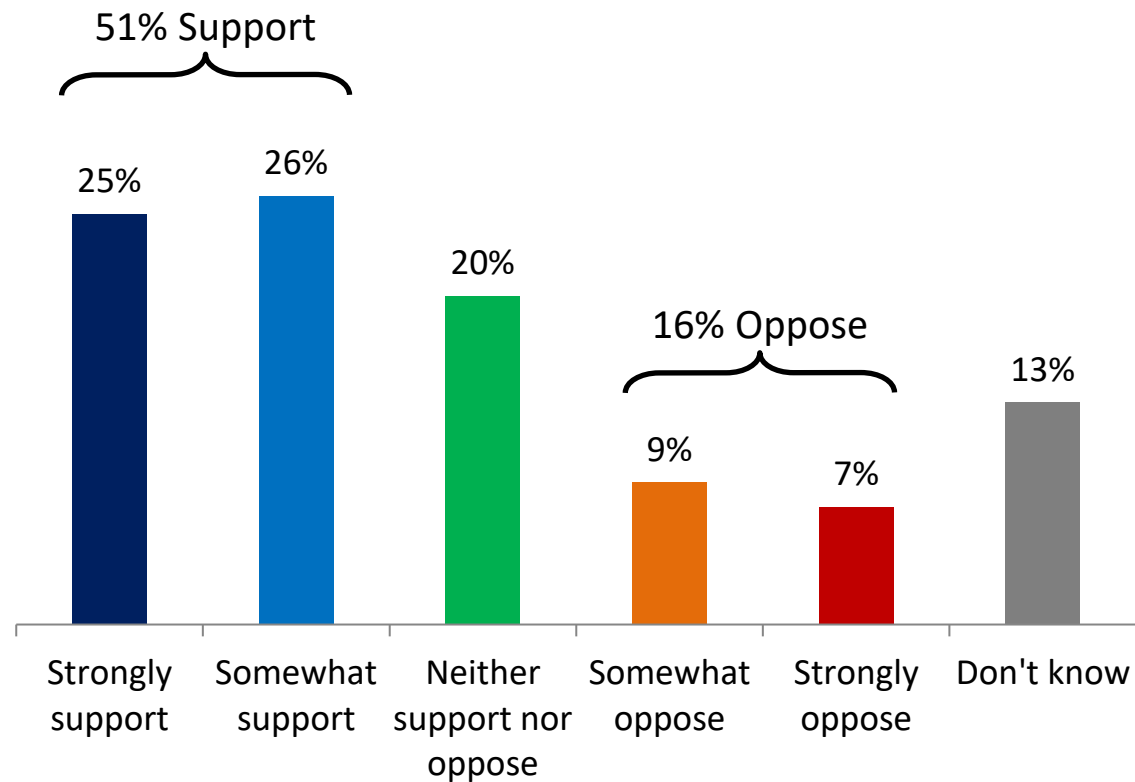


Value Clusters



New Pipeline: Almost Over half (51%) support the plan to build a new pipeline; those in the Quebec region are less likely to support

Q Danielle Smith, the Premier of Alberta, has announced a new plan to propose the building of a new pipeline under the aegis of the Federal government's Major Projects Office. The pipeline would start in Alberta and then run across to the north coast of British Columbia, to ship to markets overseas. Do you support or oppose the construction of this pipeline?
[asked of all respondents, n=1,500]



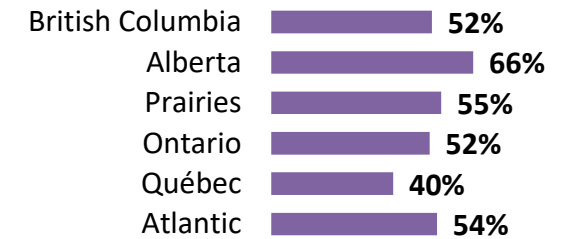
2025 Sample Breakdown

Respondents who say 'Support'

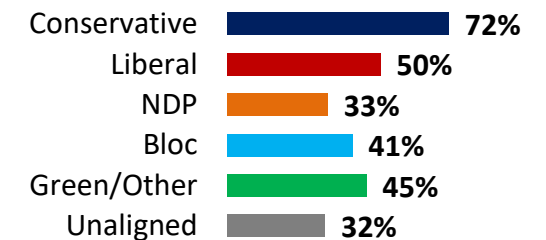
Age



Region



Federal Party ID



Value Clusters



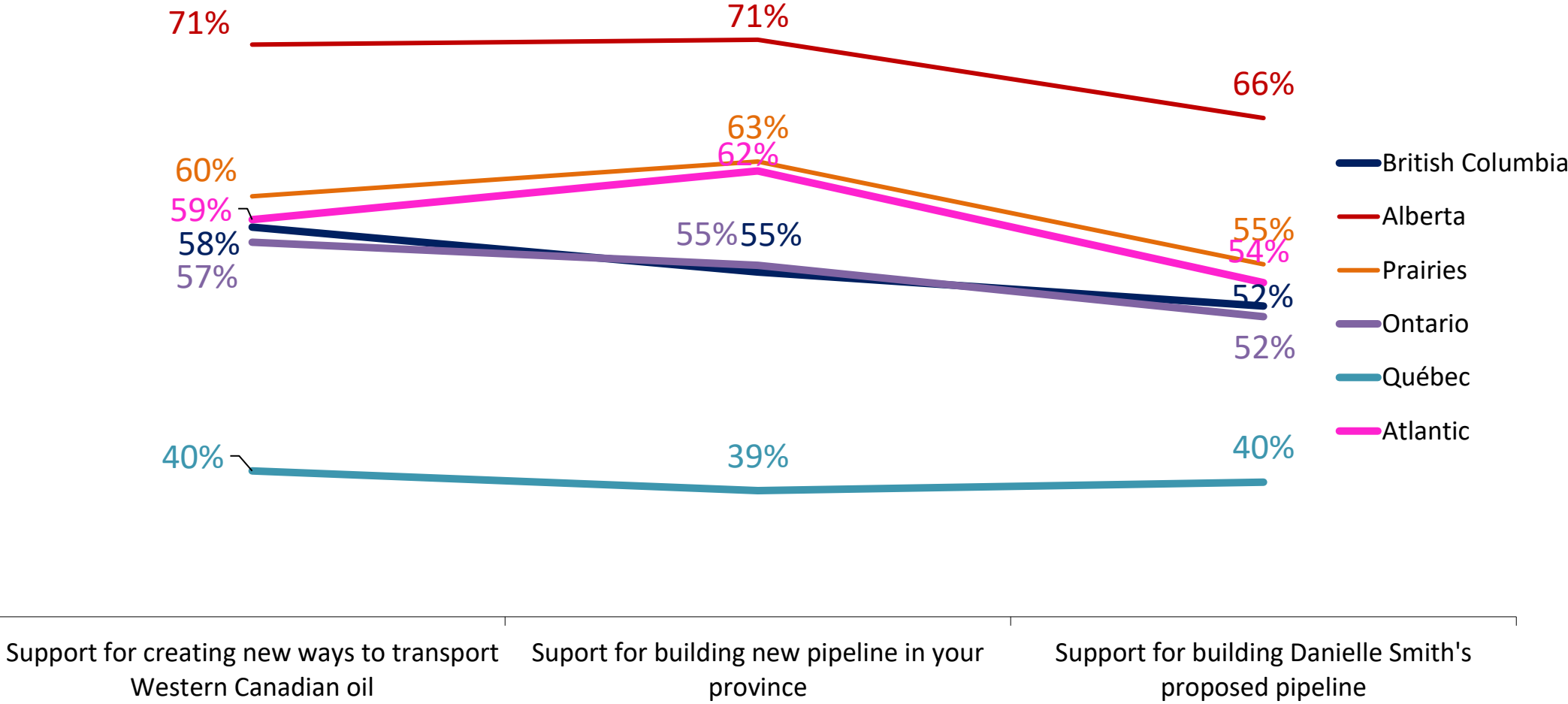
New Pipeline: Alberta region more likely to strongly support, BC largely on board with Smith’s proposed pipeline

		Region					
		BC	AB	Prairies	ON	QC	Atlantic
		(N=210)	(N=167)	(N=98)	(N=579)	(N=345)	(N=101)
Pipeline Support	Strongly support	23%	46%	31%	24%	15%	28%
	Somewhat support	30%	20%	24%	27%	25%	26%
	Neither support nor oppose	16%	12%	20%	19%	27%	19%
	Somewhat oppose	10%	7%	6%	7%	13%	8%
	Strongly oppose	15%	6%	4%	7%	4%	7%
	Don't know	7%	8%	14%	15%	17%	12%
Support		52%	66%	55%	52%	40%	54%

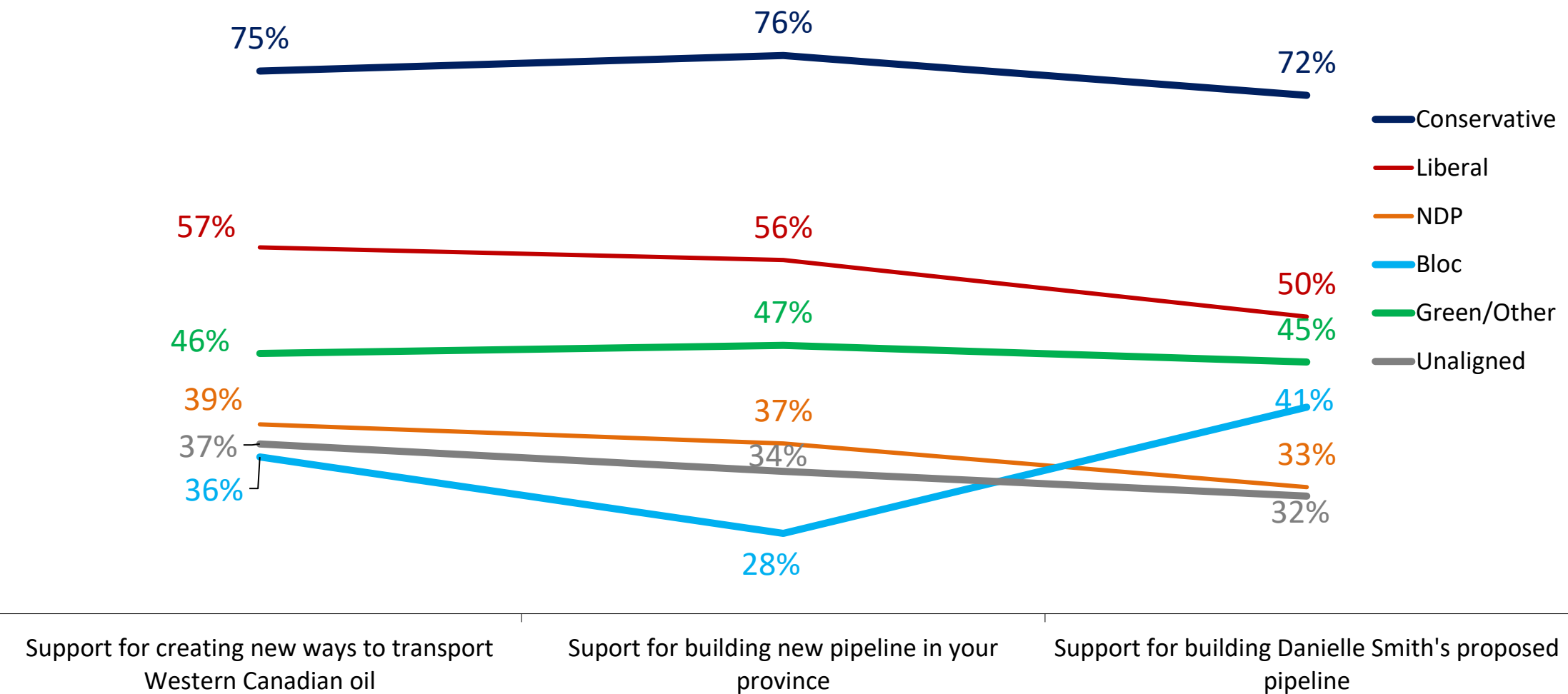
New Pipeline: Populist Conservatives are more supportive of the pipeline, while Core Left state the opposite

		Value Clusters					
		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
		(N=189)	(N=142)	(N=349)	(N=260)	(N=272)	(N=288)
Pipeline Support	Strongly support	55%	32%	27%	18%	8%	21%
	Somewhat support	22%	30%	29%	27%	21%	26%
	Neither support nor oppose	10%	23%	18%	23%	22%	22%
	Somewhat oppose	4%	6%	9%	10%	14%	7%
	Strongly oppose	4%	2%	5%	8%	16%	5%
	Don't know	4%	7%	13%	14%	18%	19%

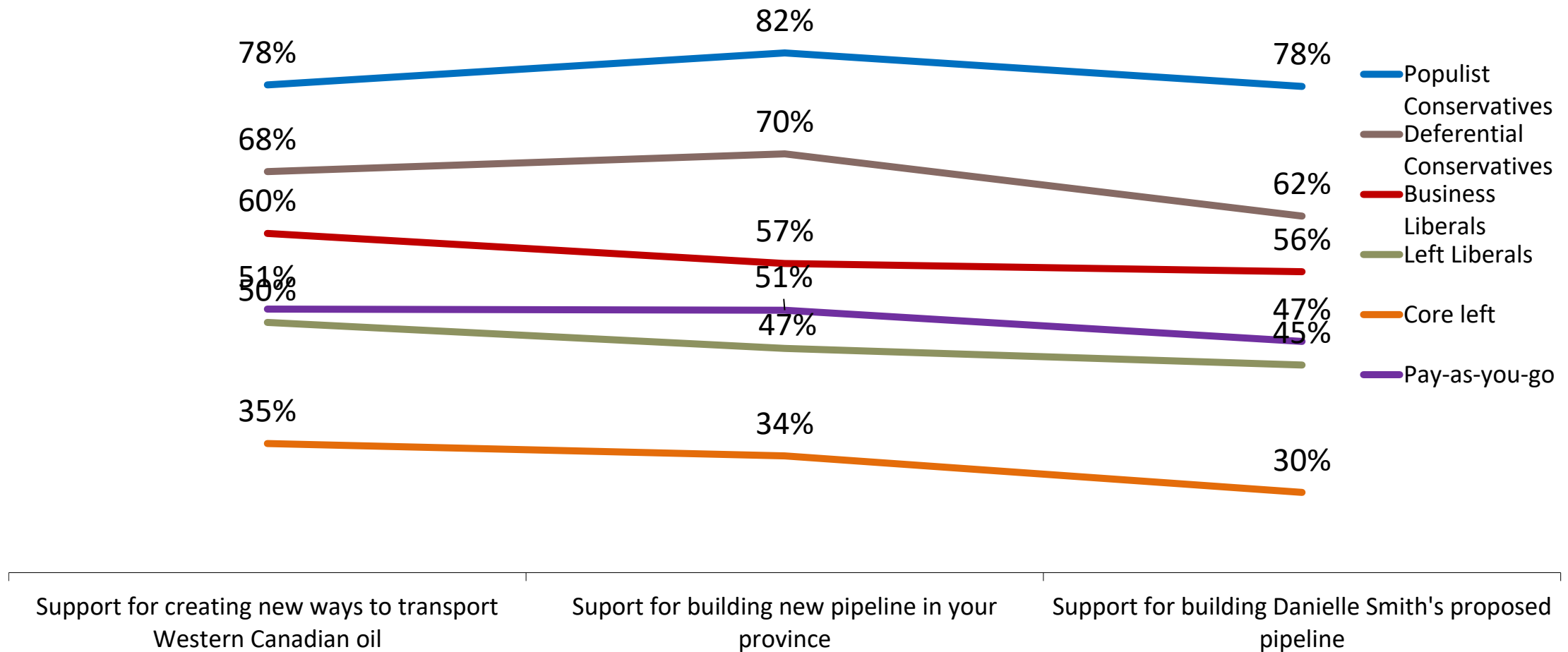
Support for Pipeline By Region: Support remains above 52% across all provinces except Quebec; slightly drops for Danielle Smith's proposal



Support for Pipeline by Party ID: Support is around 20-points higher among Conservatives (72%+) than Liberals (50%+)



Support for Pipeline by Value Clusters: Highest support among Populist and Deferential Conservatives, followed by Business Liberals and PAYGM

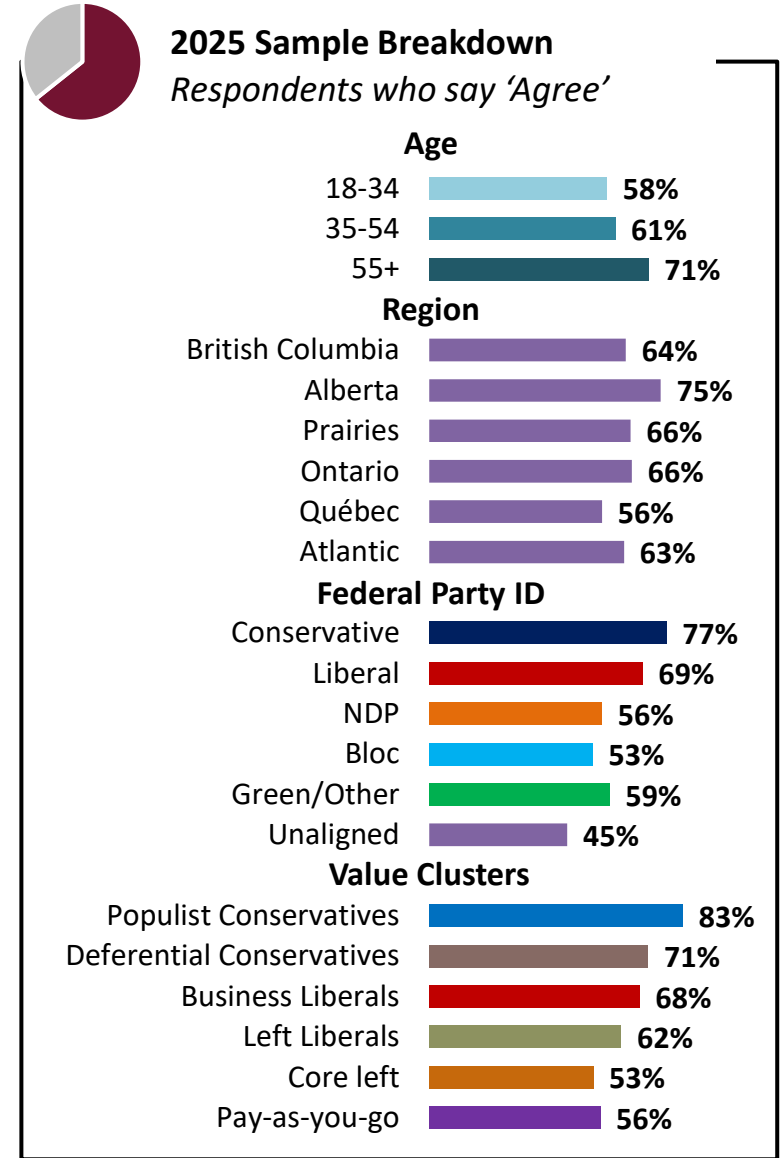
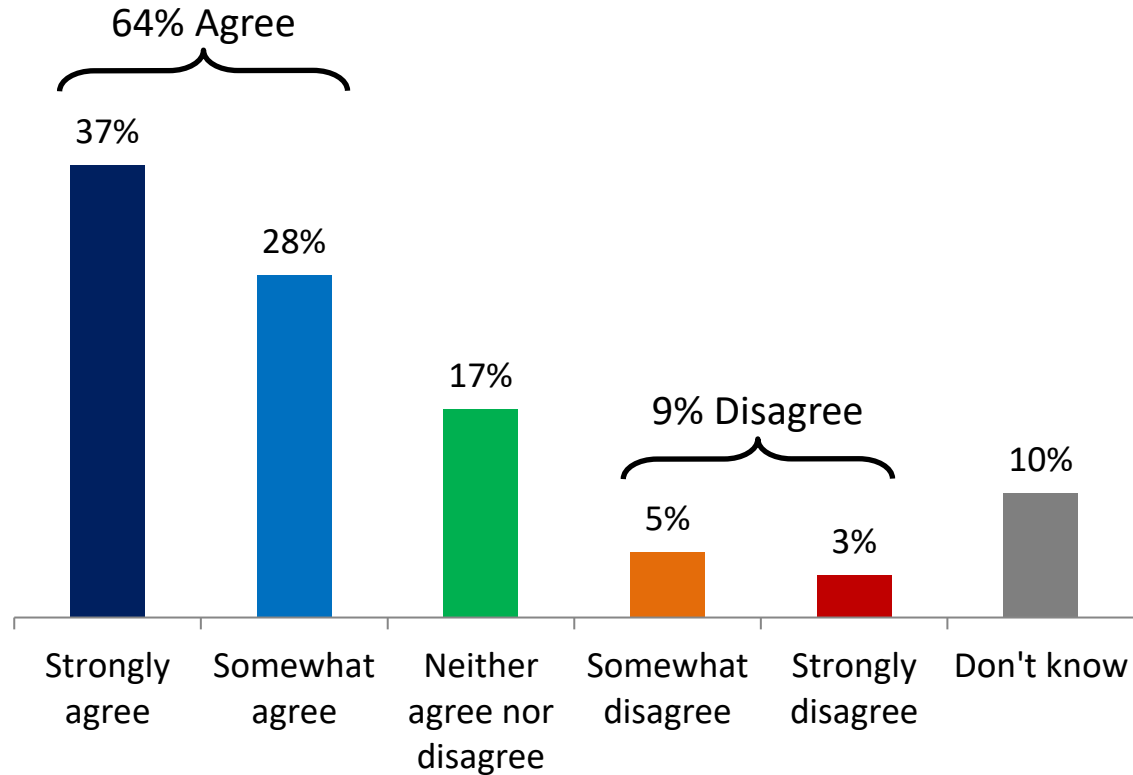


Focus on Oil Pipelines

Reducing US Dependence: Nearly 2-in-3 agree new pipelines will help reduce US dependency; highest agreement among Conservatives (77%) in Alberta (75%)

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]

It is important to build new oil pipelines as part of our efforts to reduce our dependence on the United States



Reducing US Dependence: Importance of US independence most prevalent in Alberta, followed by Ontario region

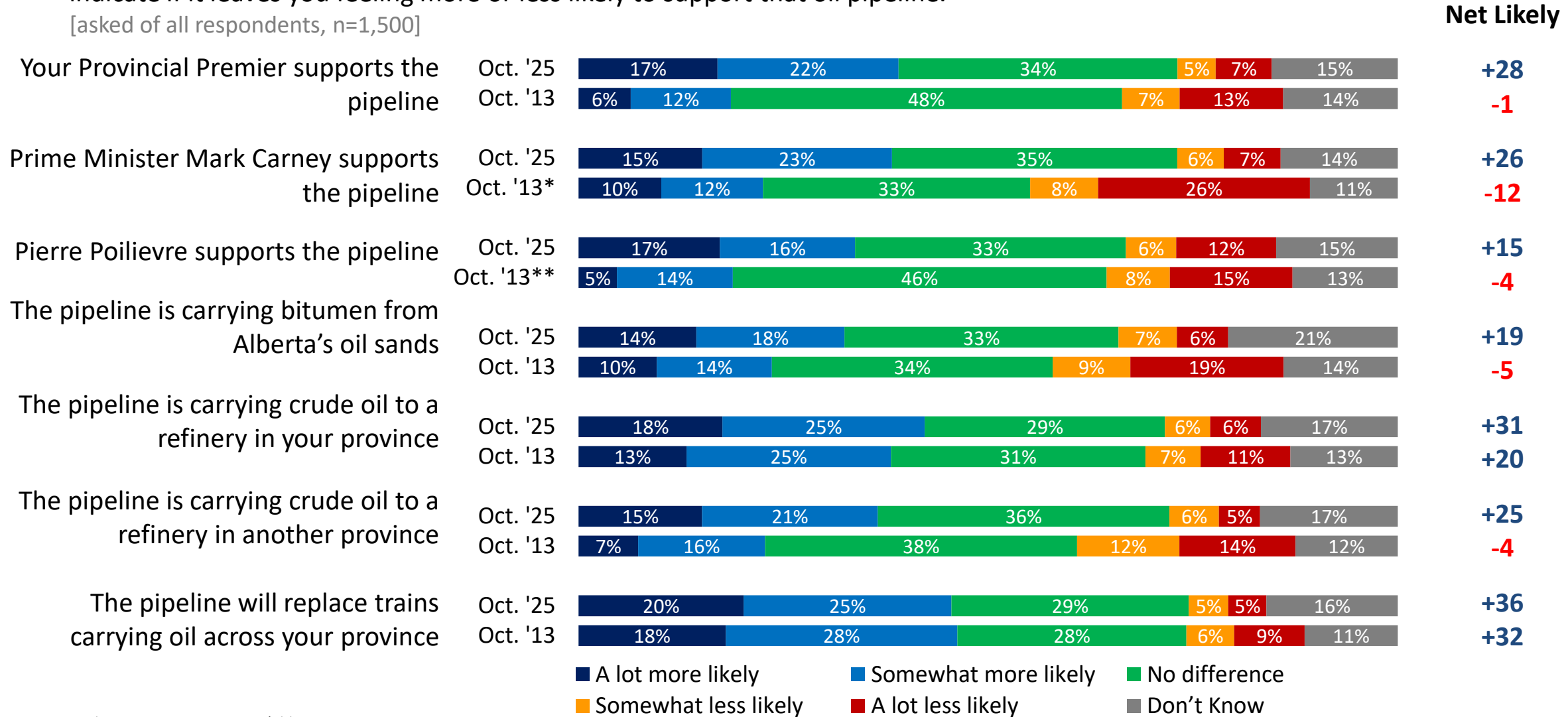
		Region					
		BC	AB	Prairies	ON	QC	Atlantic
		(N=210)	(N=167)	(N=98)	(N=579)	(N=345)	(N=101)
Pipeline Support	Strongly support	37%	51%	38%	39%	24%	40%
	Somewhat support	27%	25%	27%	27%	32%	24%
	Neither support nor oppose	15%	14%	18%	16%	20%	21%
	Somewhat oppose	6%	3%	2%	5%	7%	6%
	Strongly oppose	6%	1%	1%	4%	4%	1%
	Don't know	8%	6%	14%	10%	13%	9%

Reducing US Dependence: Populist Conservatives are more supportive of the pipeline, relatively low opposition from all value clusters

		Value Clusters					
		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
		(N=189)	(N=142)	(N=349)	(N=260)	(N=272)	(N=288)
Pipeline Support	Strongly support	62%	44%	39%	30%	25%	30%
	Somewhat support	21%	27%	29%	33%	28%	26%
	Neither support nor oppose	9%	14%	18%	16%	18%	22%
	Somewhat oppose	2%	4%	4%	8%	7%	5%
	Strongly oppose	2%	2%	1%	3%	8%	3%
	Don't know	4%	8%	8%	10%	13%	15%

Support for New Pipelines: All statements have gained net support throughout the years; likelihood to support if PM is supporting it has increased the most

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]

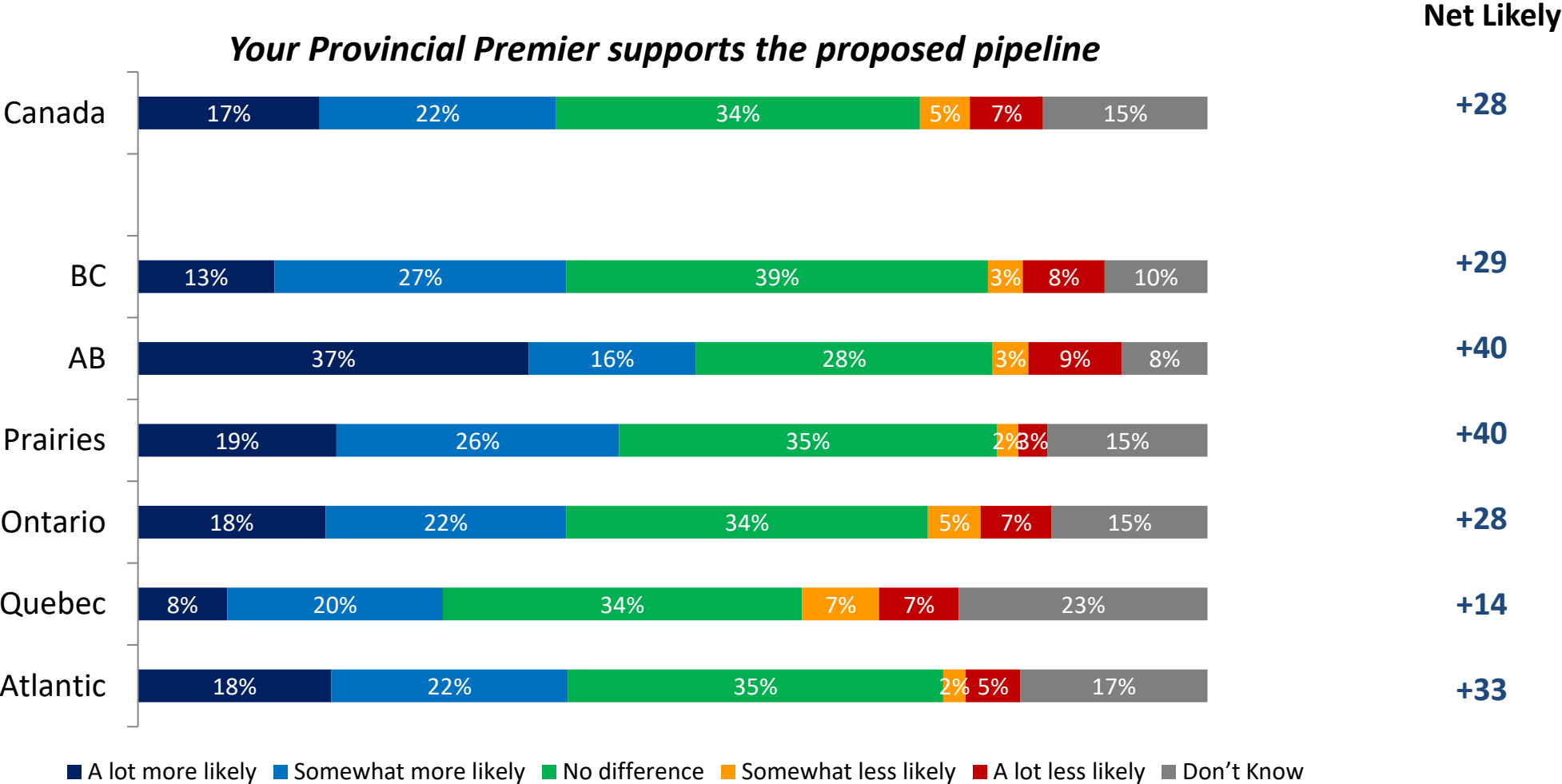


Note: In 2013 *Prime Minister Harper | **Justin Trudeau

Support for New Pipelines: Likelihood to support if Provincial Premier supports

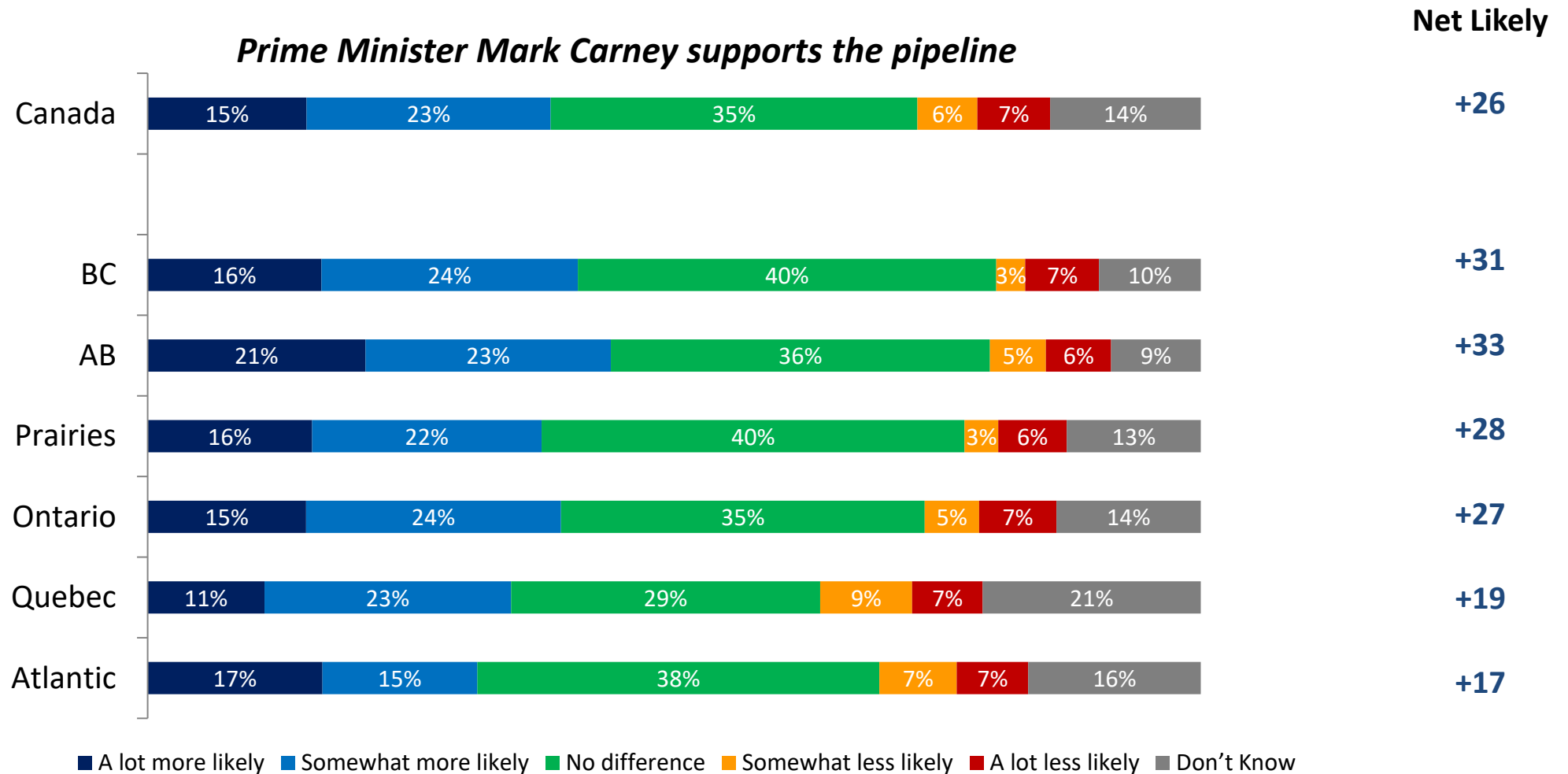
is highest in Alberta and lowest in Quebec

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



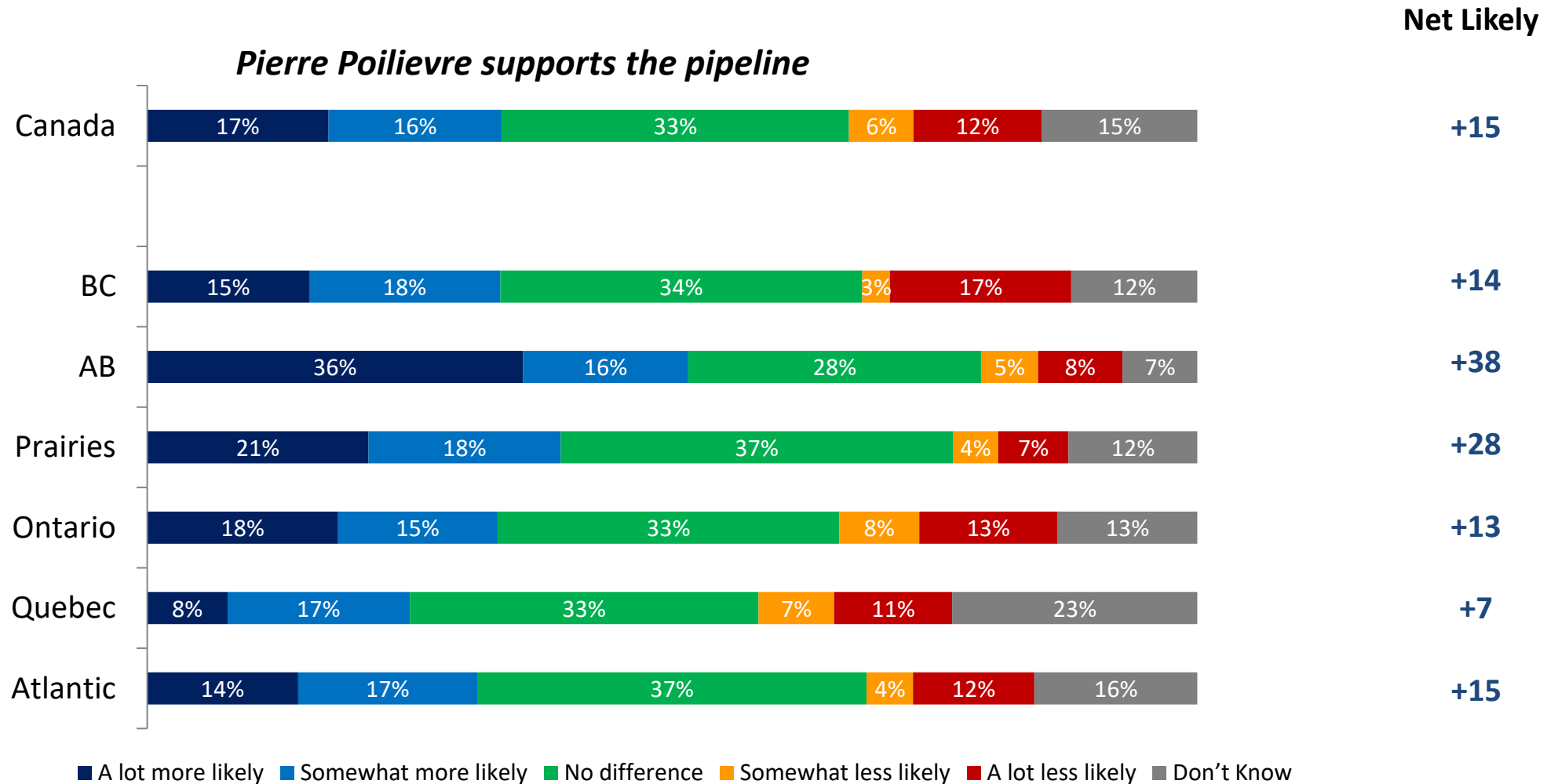
Support for New Pipelines: Support from Carney leaves those in AB more likely to support oil pipelines, while those in Atlantic least likely

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



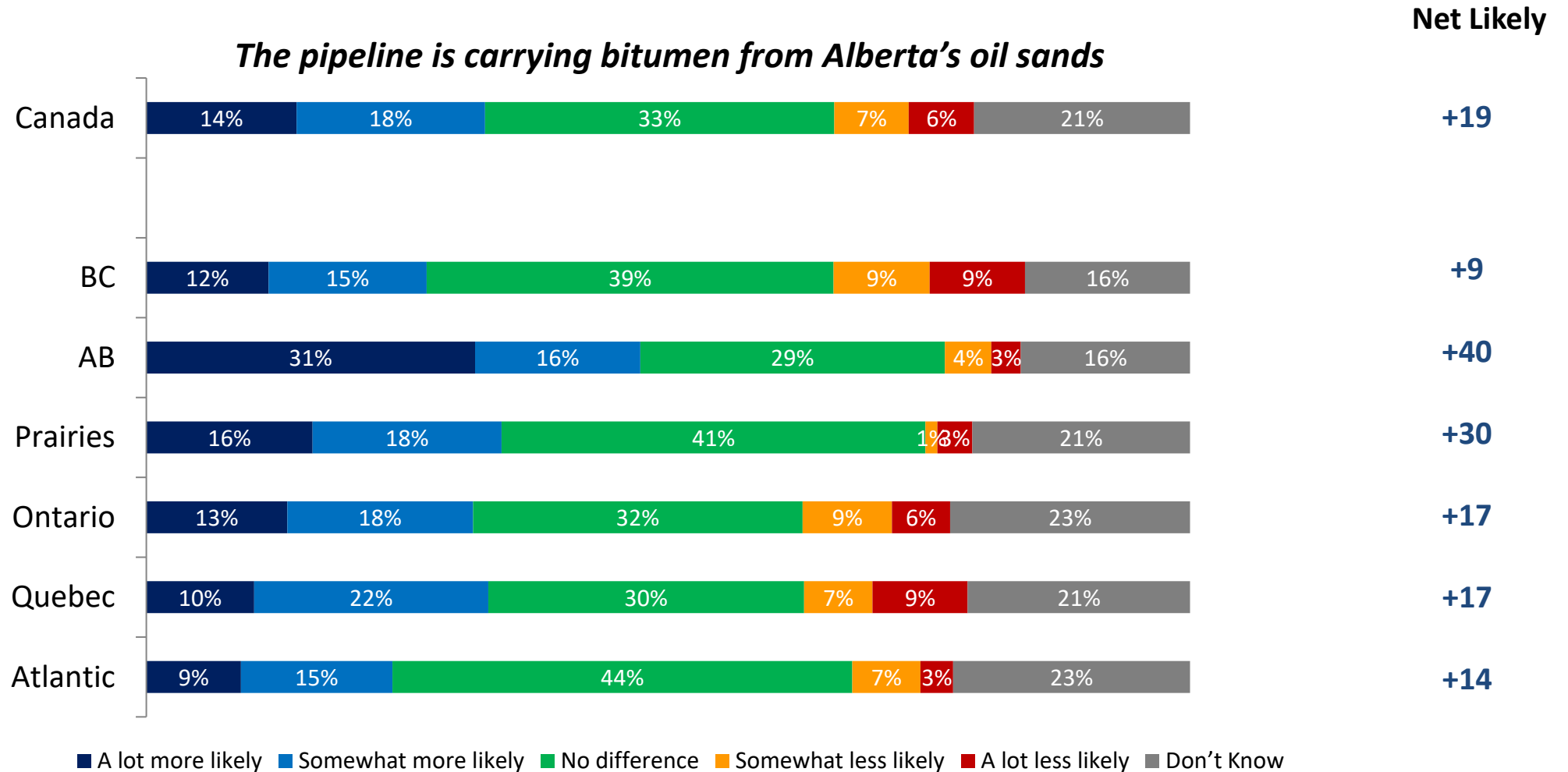
Support for New Pipelines: Support from Poilievre (+15) results in a lower net likely than support from Carney (+26)

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



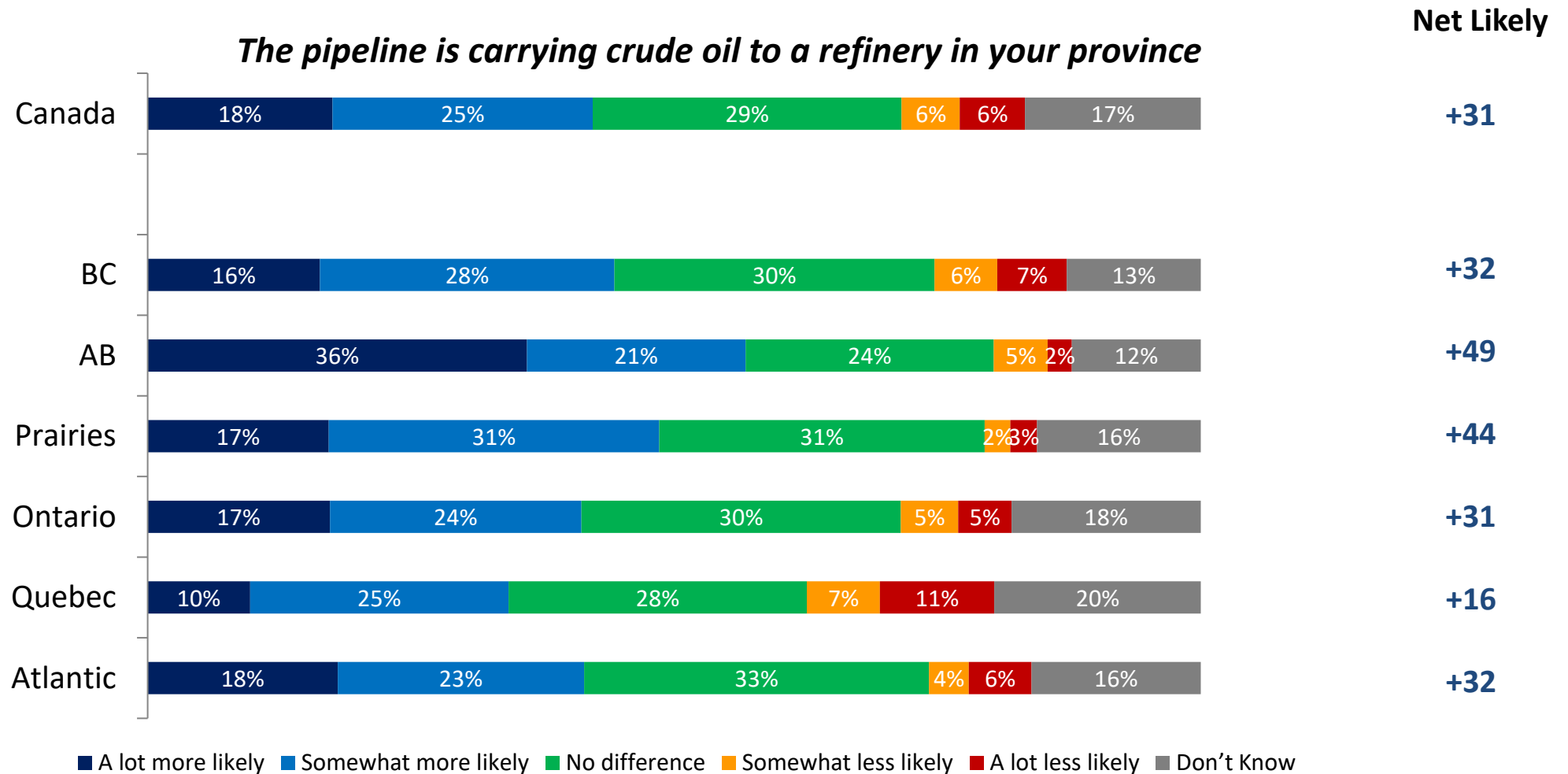
Support for New Pipelines: Alberta shows the highest net support, followed distantly by Prairies; BC is least likely to support

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



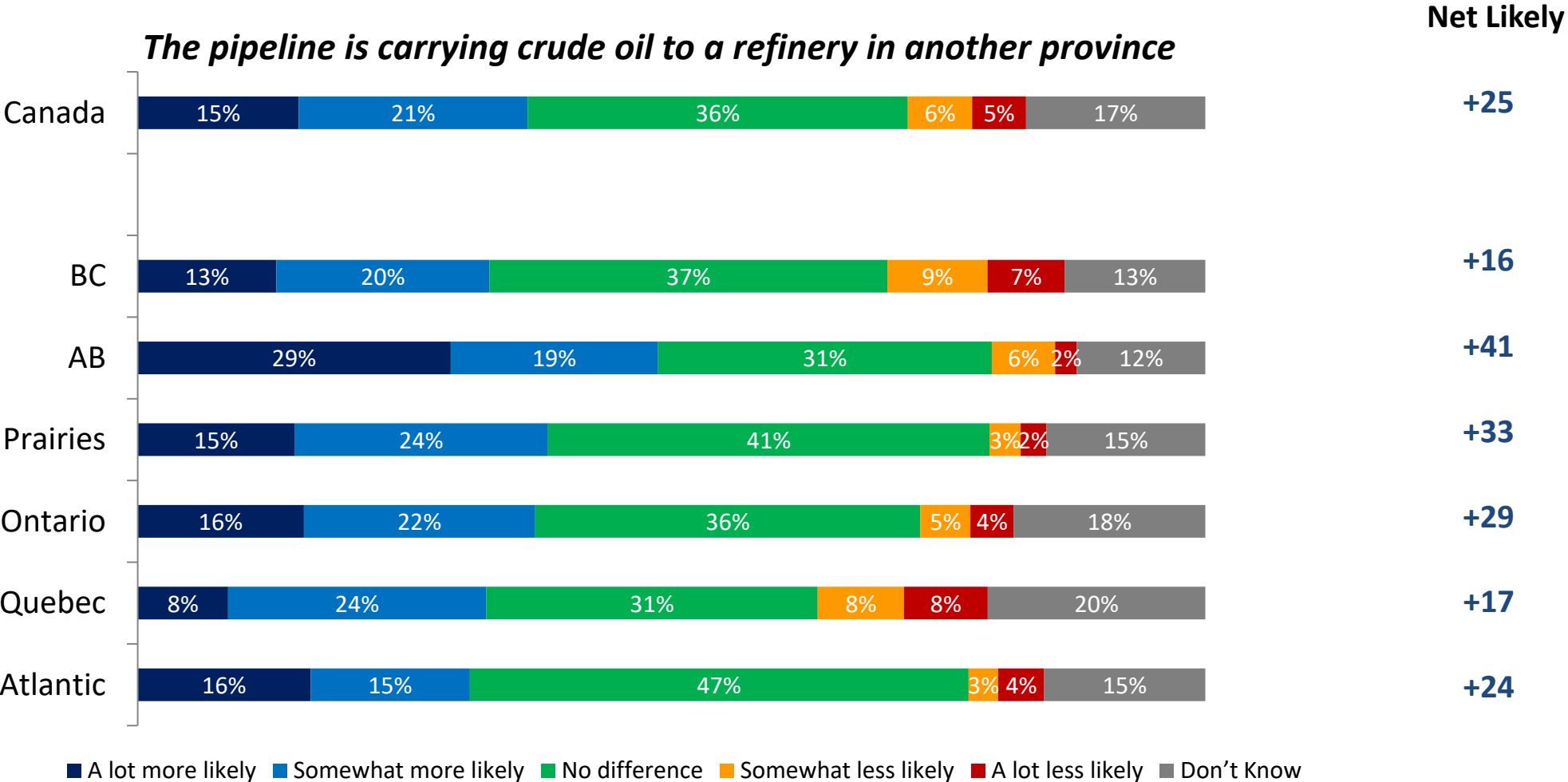
Support for New Pipelines: Statement on carrying crude oil to the province's refinery sees the most support in AB and Prairies; less support in Quebec

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



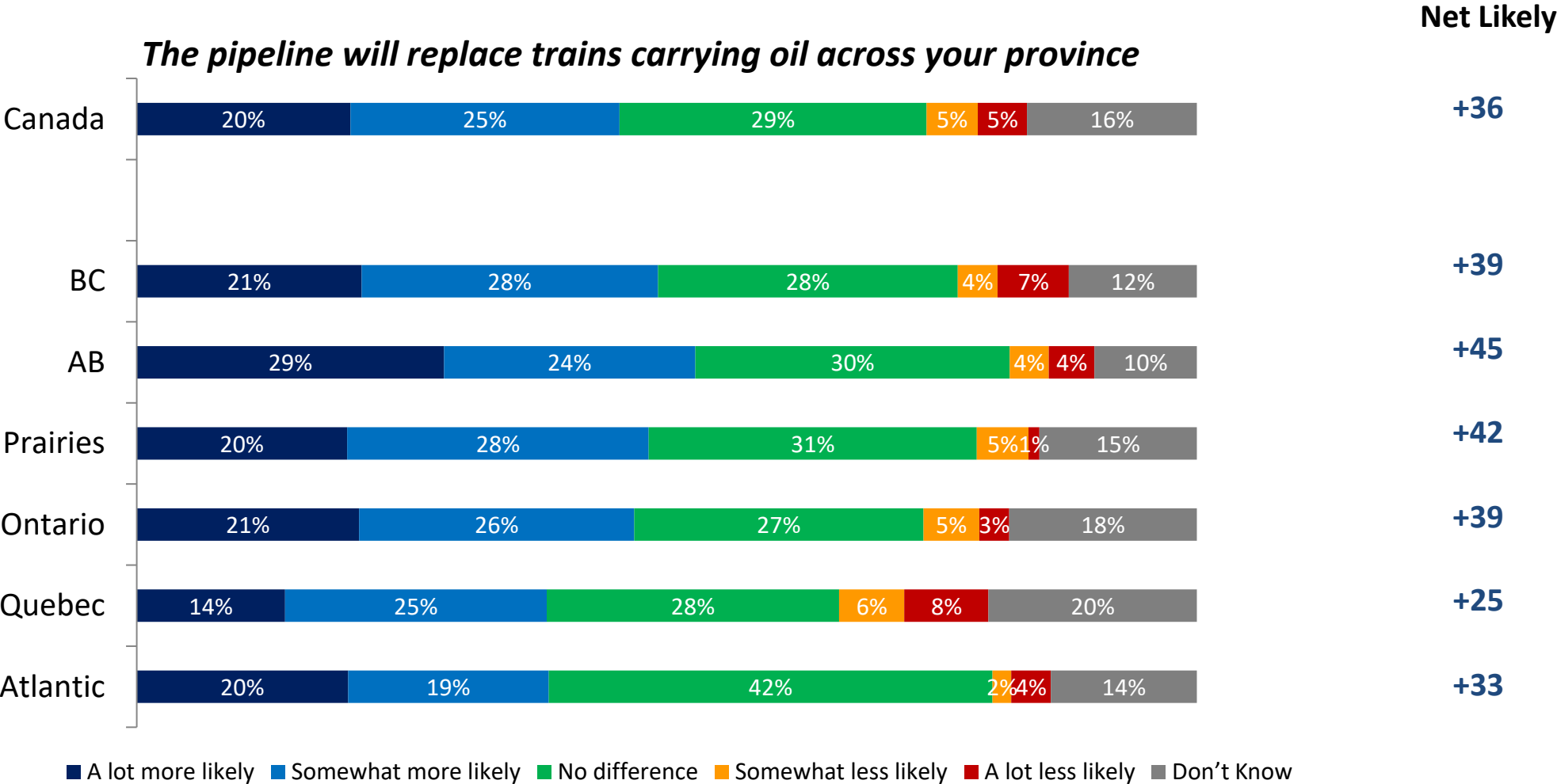
Support for New Pipelines: Support for carrying crude oil to other provinces has lowest net support in BC (+16) and Quebec (+17)

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]



Support for New Pipelines: Pipeline replacing trains has a wide range of support from all regions ³³

Q The next set of questions is about things you might hear about an oil pipeline proposed for your province. For each statement, please indicate if it leaves you feeling more or less likely to support that oil pipeline.
[asked of all respondents, n=1,500]

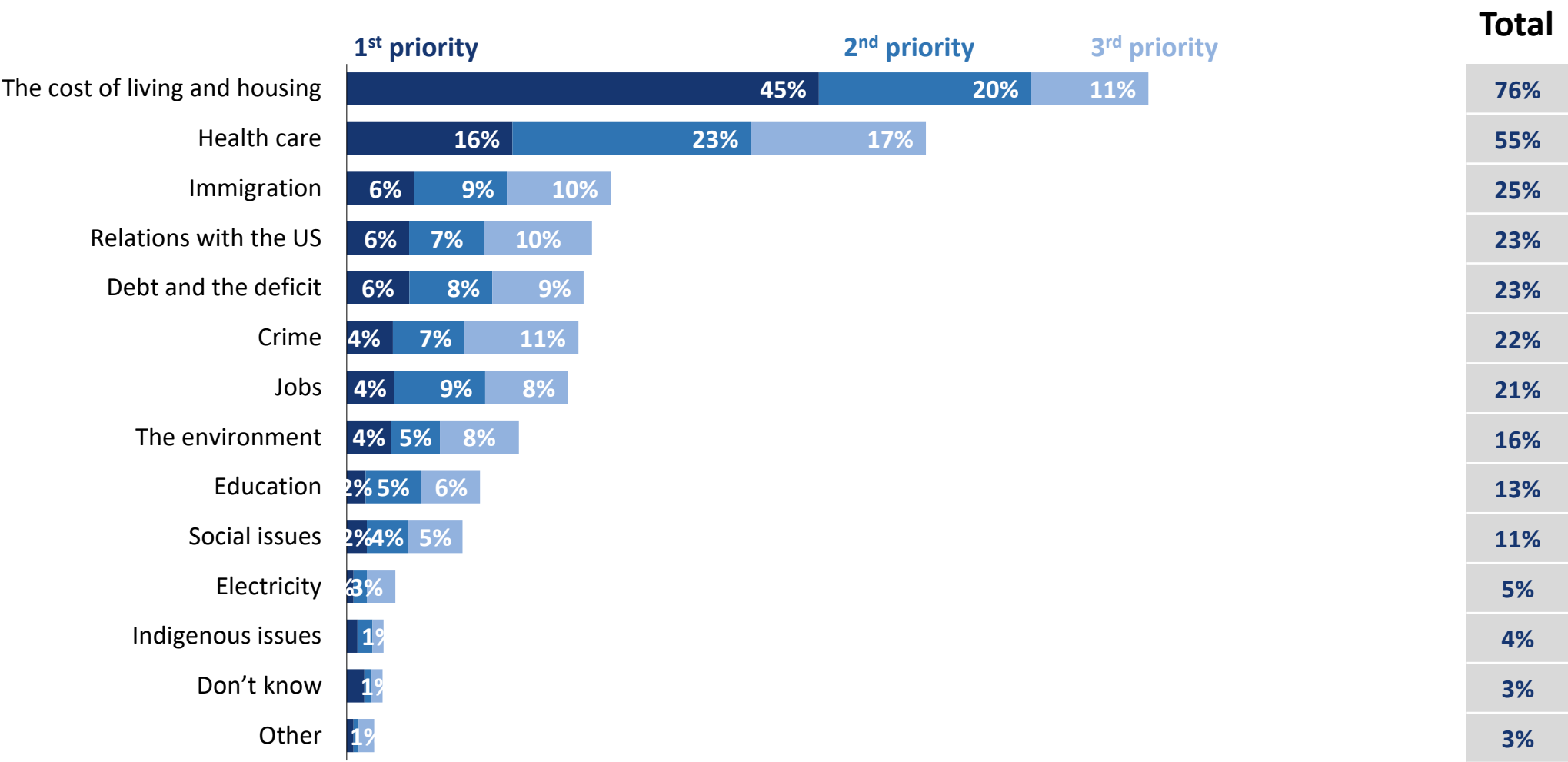


Top of Mind

Top of Mind: The cost of living and housing is a top priority; health care comes as a second



Which of the following issues is the most important issue to you? And which is the second most important to you? And which is the third most important to you?
[asked of all respondents, Oct 2025 W1-W2, n=1,500]



Note: No response not shown. Respondents who say *Don't know* are not asked to name further priorities.

Top of Mind – Tracking: Cost of living and health care remain at top issues; Environment drops from the third place in '24 to the eighth in '25.

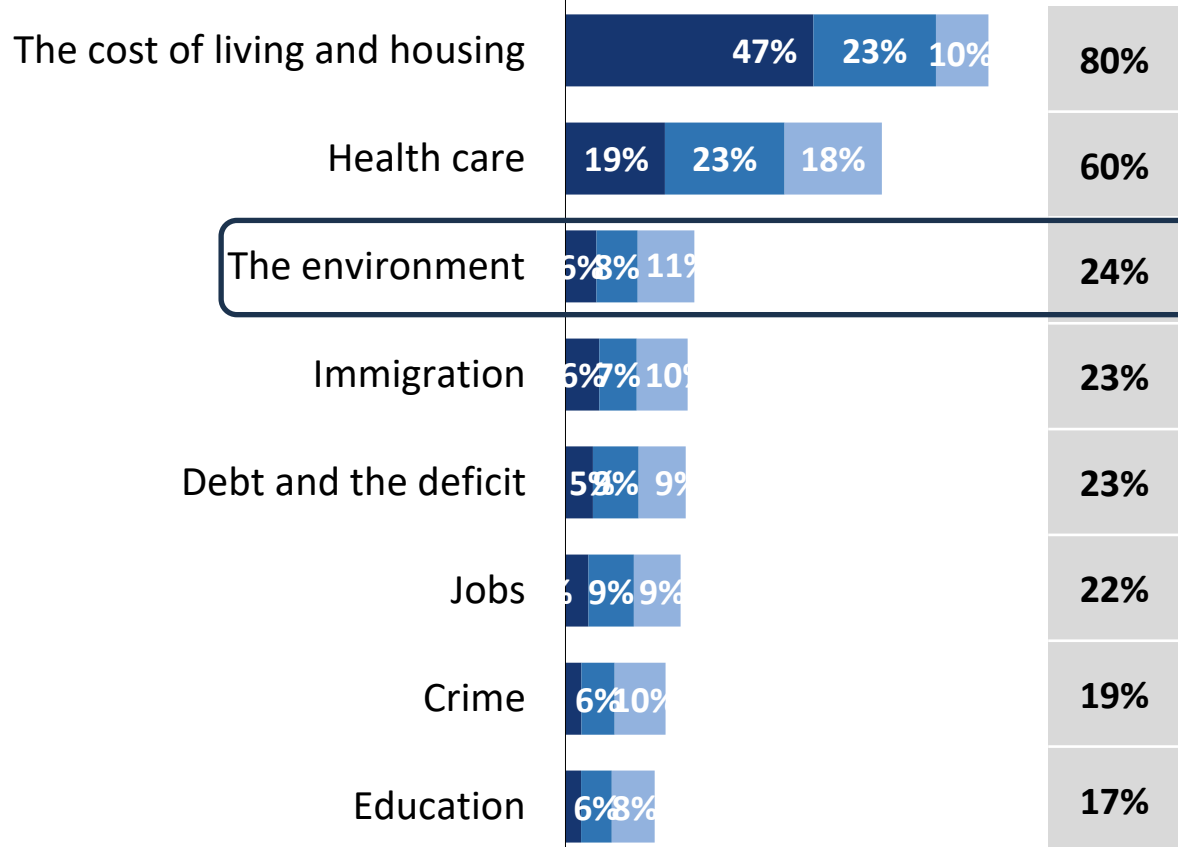


Which of the following issues is the most important issue to you? And which is the second most important to you? And which is the third most important to you?

[asked of all respondents, n=1,500]

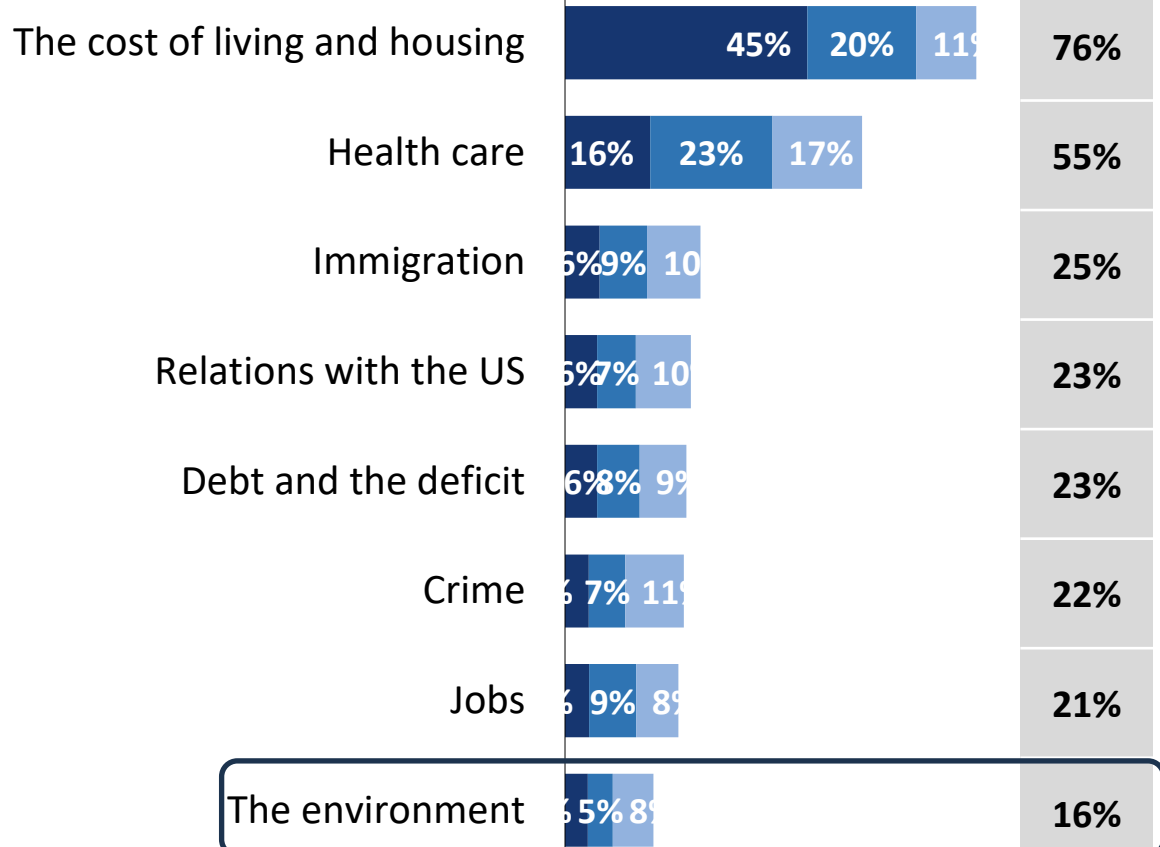
Aug. '24

1st priority 2nd priority 3rd priority Total



Oct. '25

1st priority 2nd priority 3rd priority Total



Methodology

Survey Methodology – National



These are the results of an online survey conducted between October 6th and October 13th, 2025.

Method: This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

Sample Size: n=2,093 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,500 based on Census data from Statistics Canada.

Field Dates: October 6th and October 13th, 2025.

Weighting: Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data, in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

Margin of Error: This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

Note: Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
Men 18-34	226	10.8%	201	13.4%
Men 35-54	297	14.2%	237	15.8%
Men 55+	522	25.0%	291	19.5%
Women 18-34	210	10.1%	193	12.9%
Women 35-54	363	17.4%	252	16.8%
Women 55+	470	22.5%	322	21.5%
British Columbia	339	16.2%	210	14.0%
Alberta	251	12.0%	167	11.1%
Prairies	173	8.3%	98	6.5%
Ontario	785	37.5%	579	38.6%
Québec	386	18.4%	345	23.0%
Atlantic	159	7.6%	101	6.7%



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Building Understanding.

