

Canada This Month

Memorandum of Understanding
Deep Dive

Public Opinion Research
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Field Dates: Nov. 27 to Dec. 01, 2025

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Key Findings

- 1 Awareness and engagement with the MOU vary across the country and partisan lines.** While only 27% of Canadians are familiar with the MOU, awareness jumps to 39% in Alberta and 40% Populist Conservatives, while Left Leaning and Eastern Canada remain far less engaged and more uncertain. This is a recurring pattern in which support is driven by conservative-aligned groups, while skepticism comes from left-leaning segments and Quebec.
- 2 The first impression is mildly positive and is regionally and ideologically driven.** Among those who have heard of MOU, 42% say it sounds like a good thing, rising to a majority among Albertans (55%), Conservatives (51%), and Business Liberals (51%). In contrast, Quebecers (37%), British Columbians (39%), and left-leaning are more hesitant.
- 3 The economic argument, along with advancing energy policy and building mutual trust, forms the core support narrative for the MOU.** More than six-in-ten Canadians (63%) agree the MOU strengthens the economy and reduces our dependence on the United States, with support exceeding 70% among Populist Conservatives, Differential Conservatives, and Business Liberals.
- 4 Climate commitments, Indigenous consultation, and interprovincial fairness form the core resistance narrative.** Nearly four-in-ten (39%) believe the MOU sacrifices climate commitments, a view that rises sharply among NDP (57%), Bloc (57%), and Core Left (50%) segments, while majorities also object to BC (55%) and Indigenous groups (52%) being excluded.
- 5 The MOU has not shifted the federal government's approval.** Satisfaction with the federal government was up early in November before settling back to a modest +2 NET score.

Segmentations

Party ID

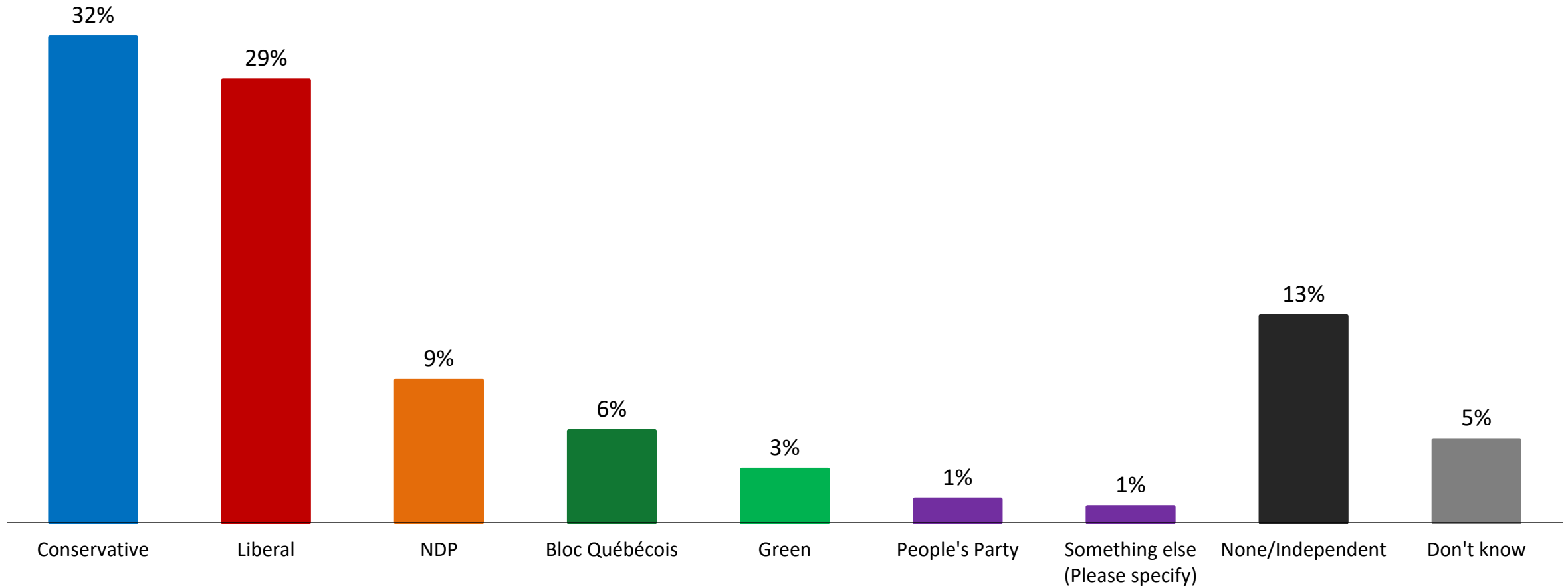
Federal Party ID: Most Canadians identify as Conservatives (32%) or Liberals (29%)

6



Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...

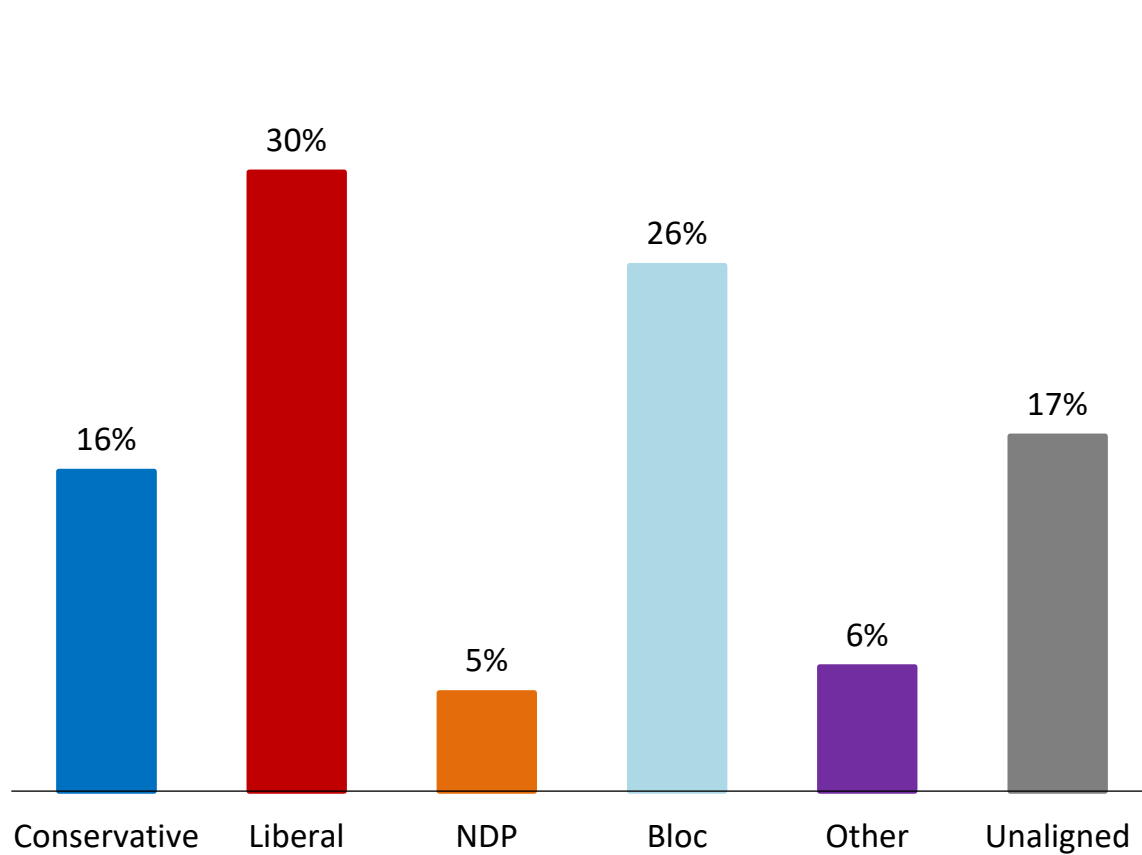
[asked of all respondents; n=1,250]



Federal Party ID (Quebec vs. ROC): In QC more identify as liberals than Bloc (5-point lead); in ROC more identify as Conservatives than Liberals⁷

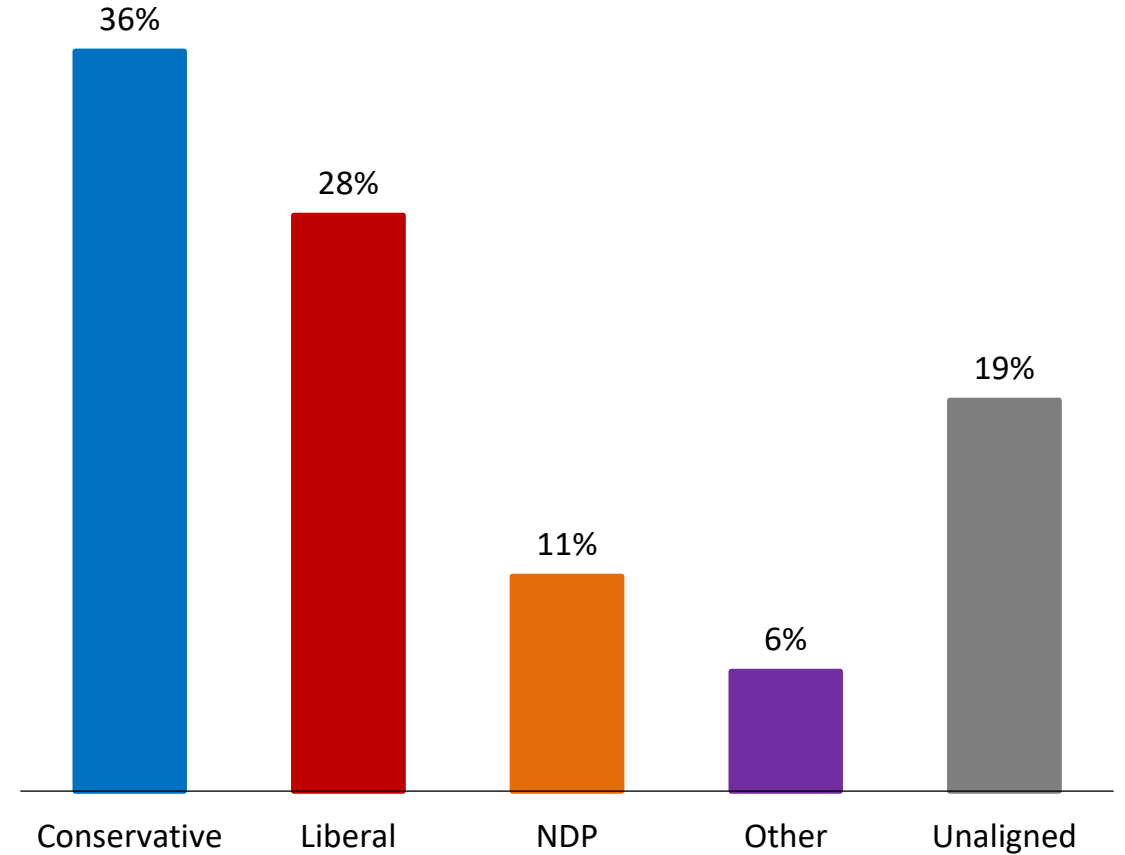
Party ID: Quebec

[Respondents in Quebec; n=288]



Party ID: Rest of Canada

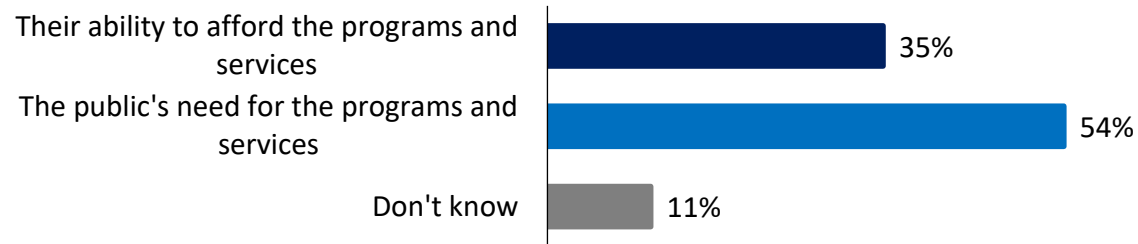
[Respondents in the rest of Canada; n=962]



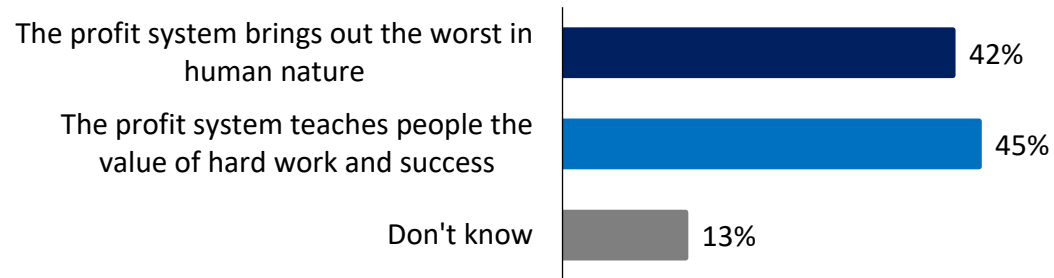
Value clusters

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

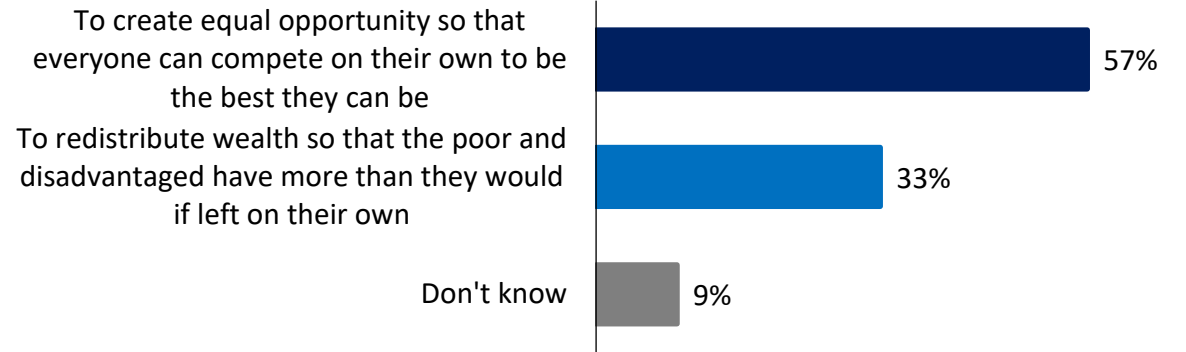
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?
[asked of all respondents; n=1,250]



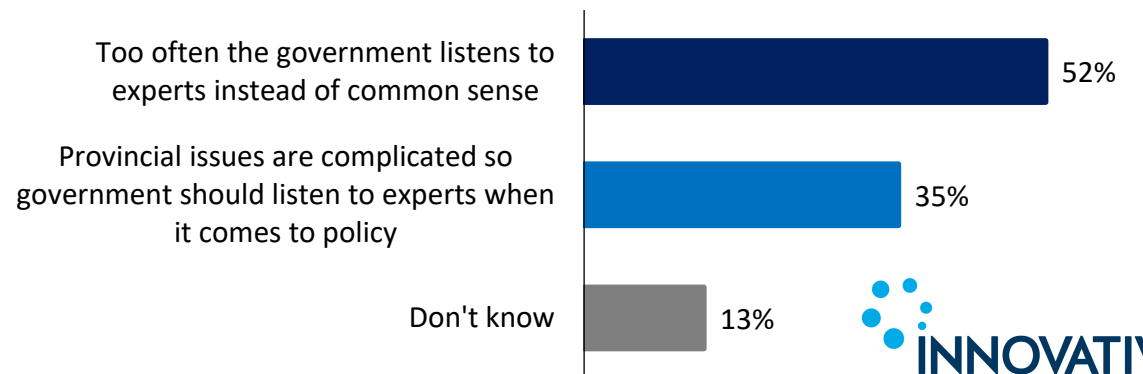
Q Which of the following statements comes closest to your view?
[asked of all respondents; n=1,250]



Q Is the main role of government to...?
[asked of all respondents; n=1,250]



Q When it comes to government decision making, which of the following statements is closest to your view?
[asked of all respondents; n=1,250]

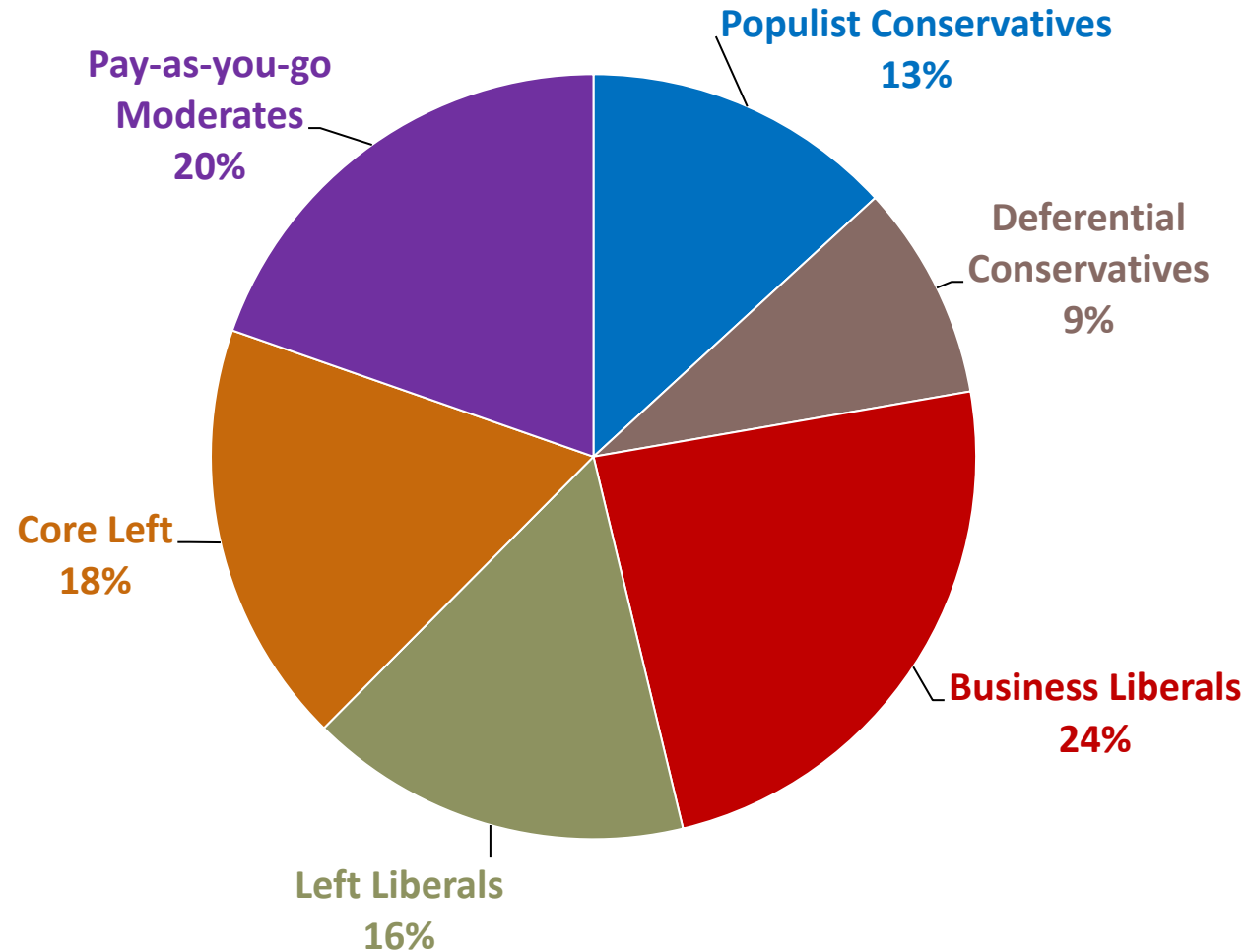


Value clusters: Nearly 1-in-4 Canadians are Business Liberals, while 1-in-5 are Pay-as-you-go Moderates



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=1,250]



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	91%	89%	0%	0%	0%	77%
	Public Need	0%	0%	95%	92%	91%	0%
Is the main role of government to...?	Create equal opportunity	98%	74%	65%	96%	0%	34%
	Redistribute wealth	0%	20%	26%	0%	96%	40%
When it comes to government decision making...	Rely on common sense	100%	0%	47%	54%	42%	55%
	Listen to experts	0%	85%	44%	33%	42%	20%
The profit system...	Brings out the worst in human nature	0%	0%	0%	88%	87%	62%
	Teaches value of hard work and success	90%	92%	94%	0%	0%	11%

Federal Government

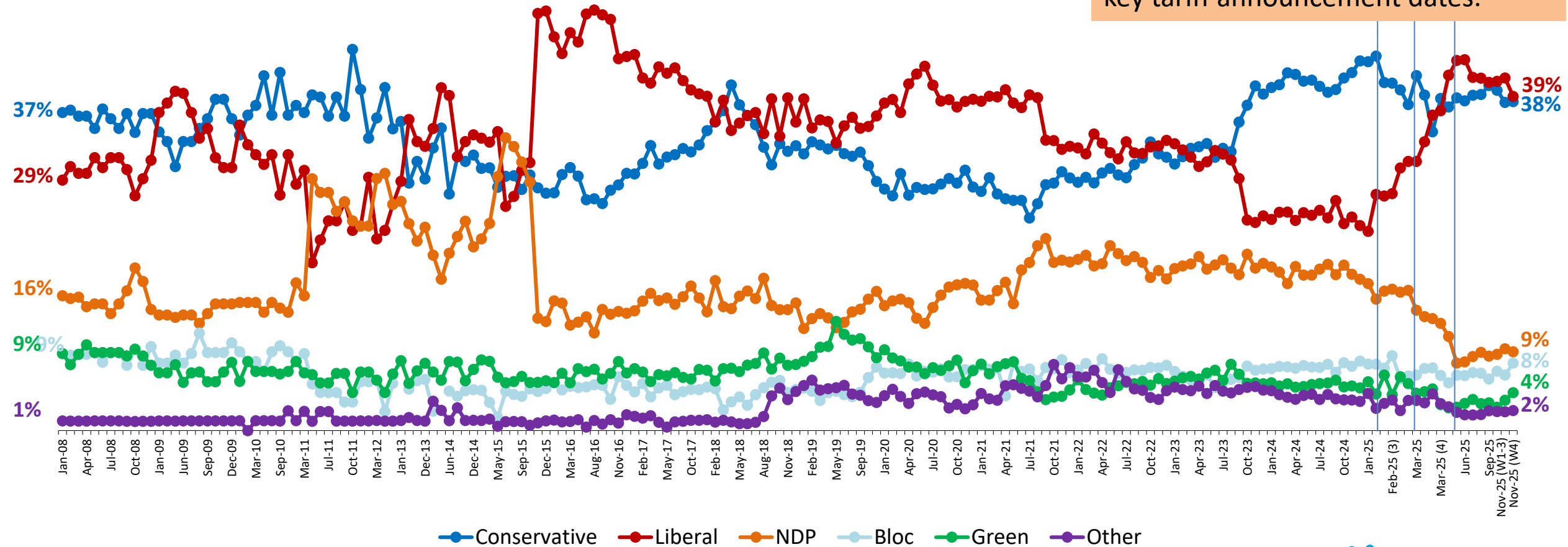
Federal Decided Vote Tracking: Liberals and Conservatives are statistically tied at 39% vs 38% respectively



If a federal election were held today, which party would you vote for? In that case, which party do you lean toward slightly? **[DECIDED]**

[only decided voters; n=1,110]

Feb 1st, March 4th and April 2nd are key tariff announcement dates.



Decided Vote by REGION: Liberals lead in Eastern Canada; Conservatives lead from the Prairies westward; BC is statistically tied¹⁴

Decided vote by REGION

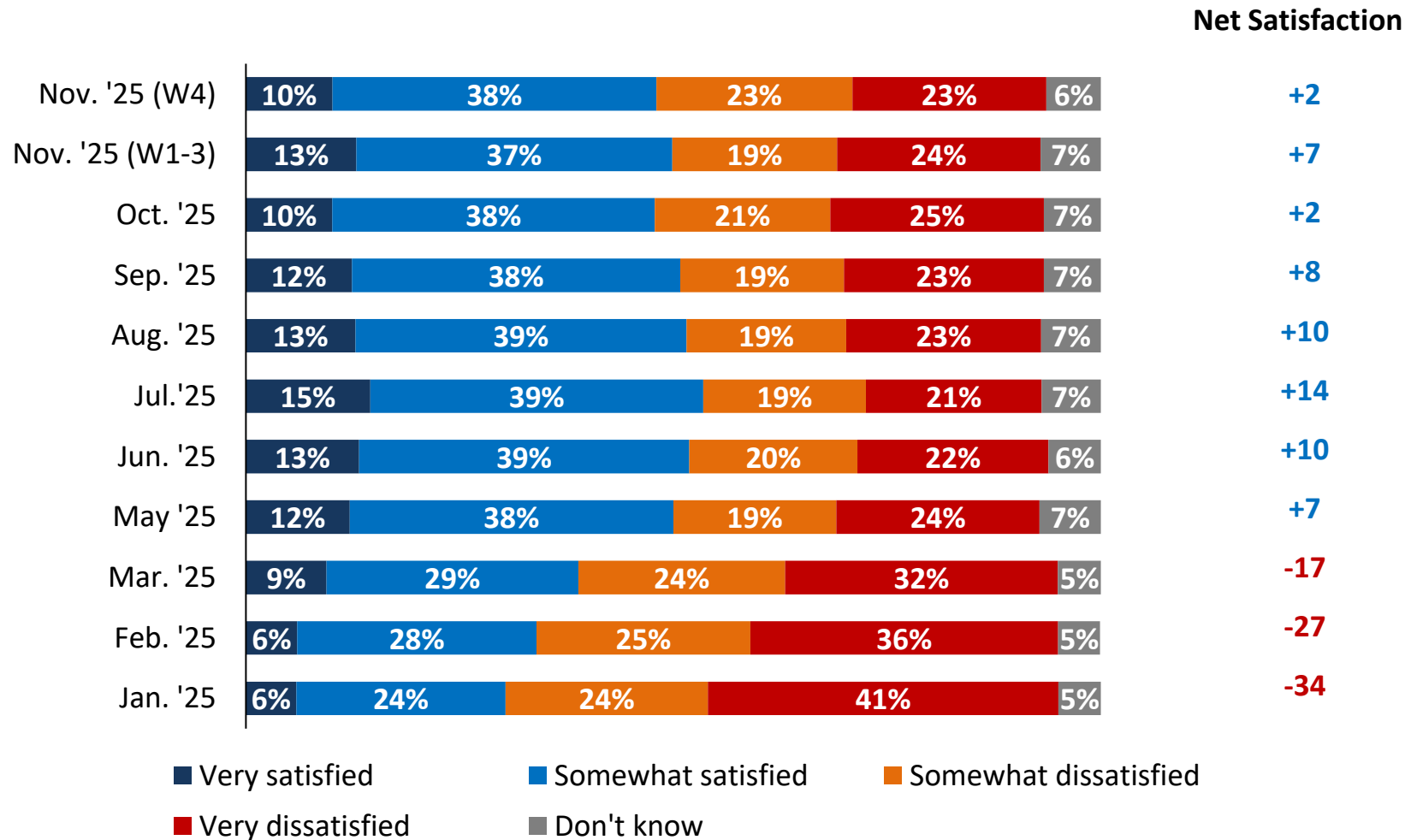
		REGION					
Decided Vote		BC	AB	Prairies	ON	QC	Atlantic
		(N=158)	(N=125)	(N=75)	(N=428)	(N=253)	(N=71)
	Conservative	41%	57%	51%	40%	21%	31%
	Liberal	36%	26%	26%	45%	36%	48%
	NDP	15%	9%	15%	9%	4%	6%
	Bloc	0%	0%	0%	0%	34%	0%
	Green	6%	3%	7%	4%	2%	12%
	Other	2%	5%	1%	2%	2%	3%

Overall Federal Satisfaction Tracking: Net satisfaction increased by 5 points in first three weeks of Nov. '25 , but decreased back to +2 in W4



Generally speaking, how satisfied are you with the performance of the FEDERAL government in Canada?
Would you say you are...?

[asked of all respondents; n=1,250, oversamples in AB, BC, QC]



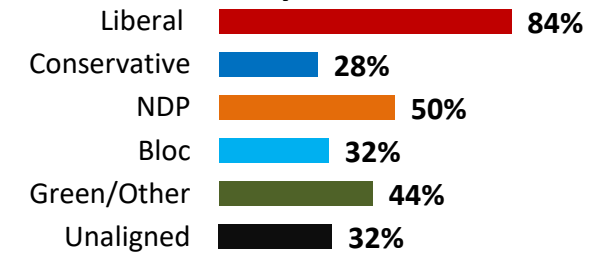
Segmentation

Those who say 'Satisfied'

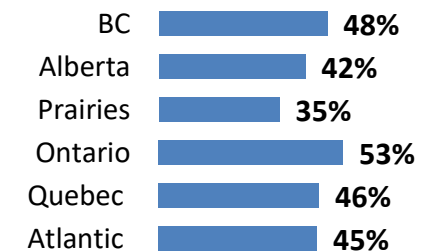
Age



Party ID



Region



Value clusters



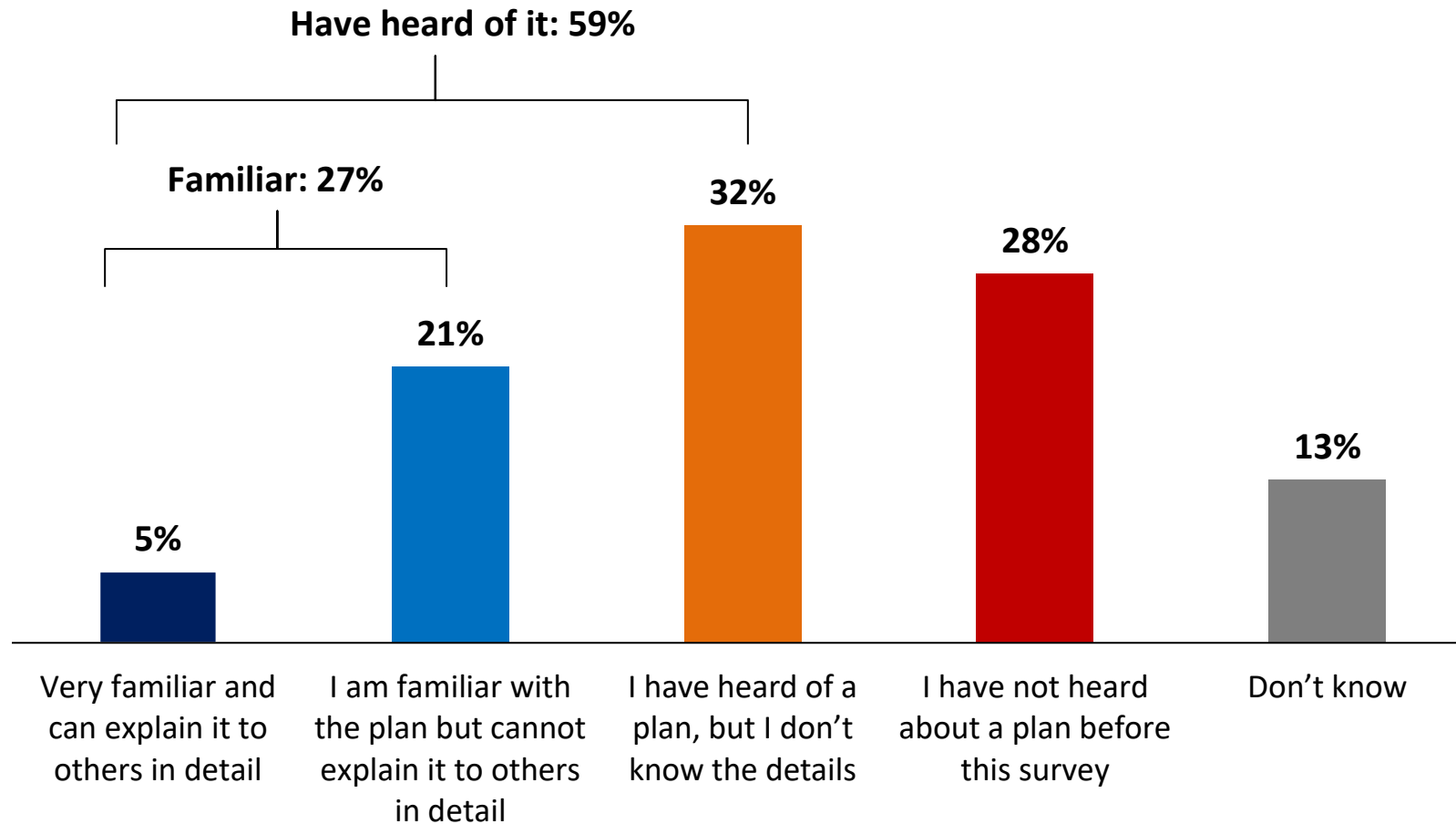
MOU – First Impression

Familiarity: 27% are familiar with the MOU, with most attention on it in Alberta (39%) and among Populist Conservatives (40%)¹⁷



How familiar are you with the just-announced Memorandum of Understanding between the federal and Alberta governments on how to develop Alberta's energy sector and make Canada an energy superpower?

[asked of all respondents, n=1,250, oversamples in AB, BC, QC]



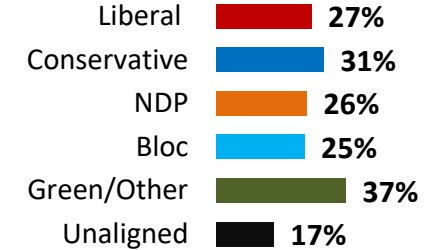
Segmentation

Respondents who say 'Familiar'

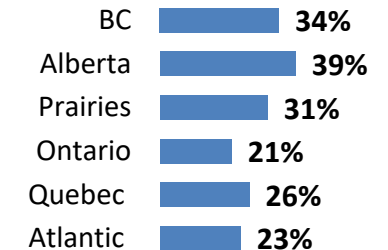
Age



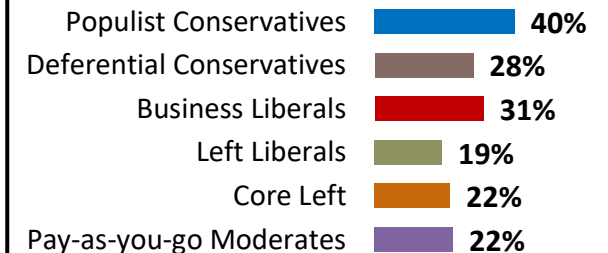
Party ID



Region



Value clusters

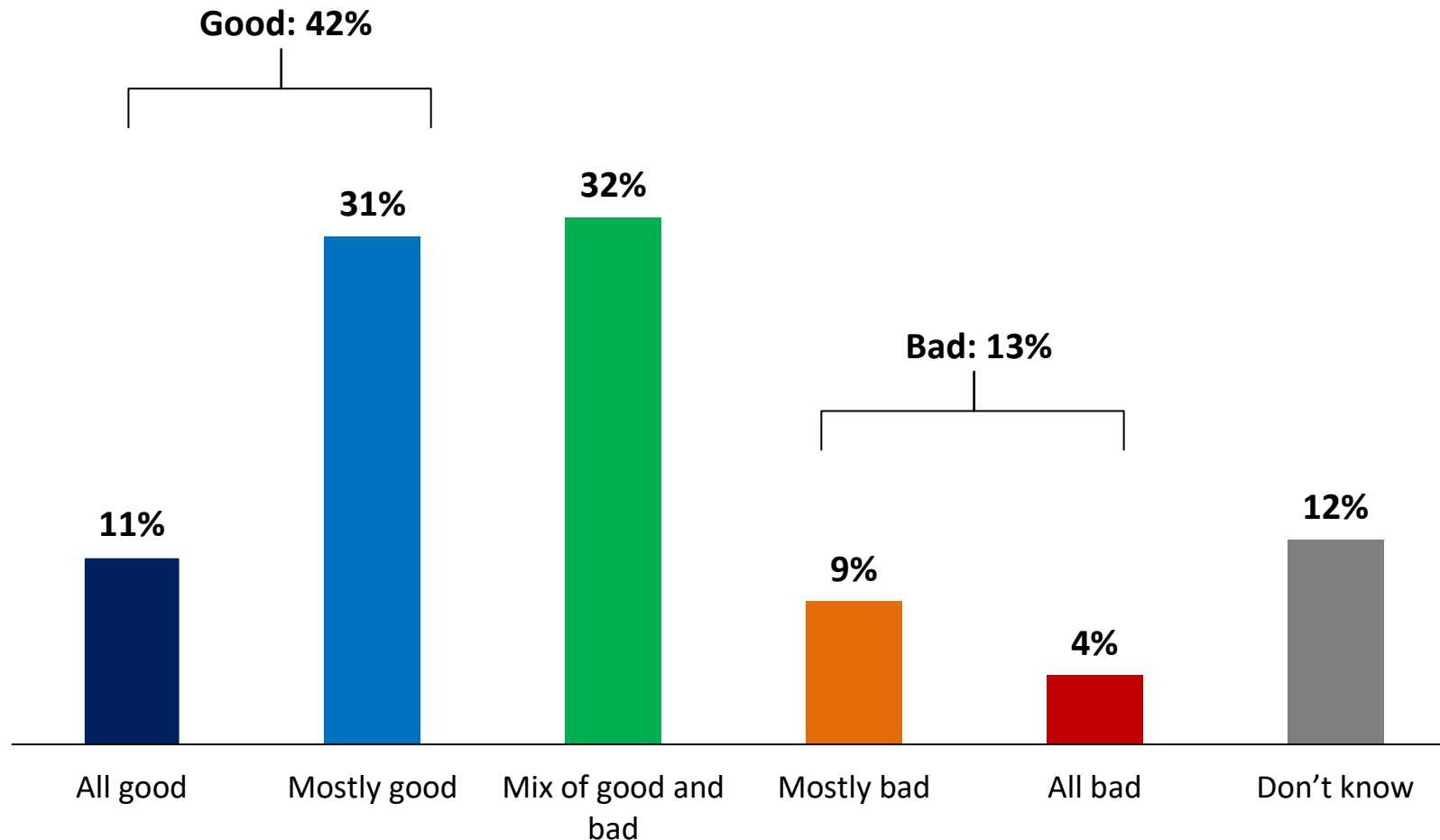


First Impression: 42% have mostly “good” impression, among which are 55% of Albertans vs 39% of British Columbians and 37% of Quebeckers¹⁸



From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that “have heard of” MOU, n=738, oversamples in AB, BC, QC]



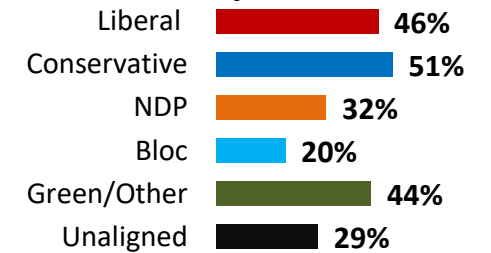
Segmentation

Respondents who say MOU sounds 'Good'

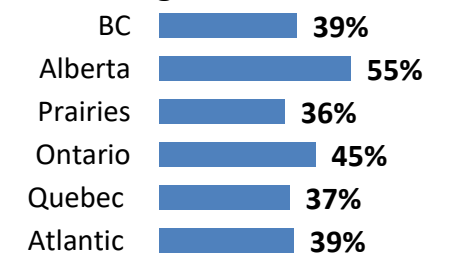
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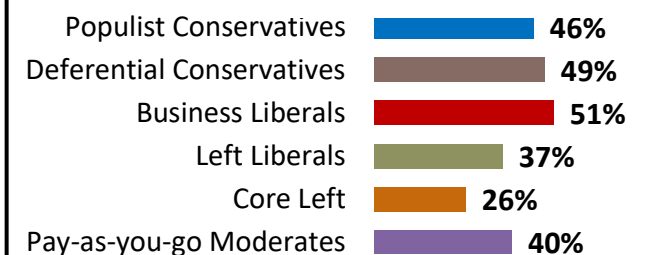
Party ID



Region



Value clusters



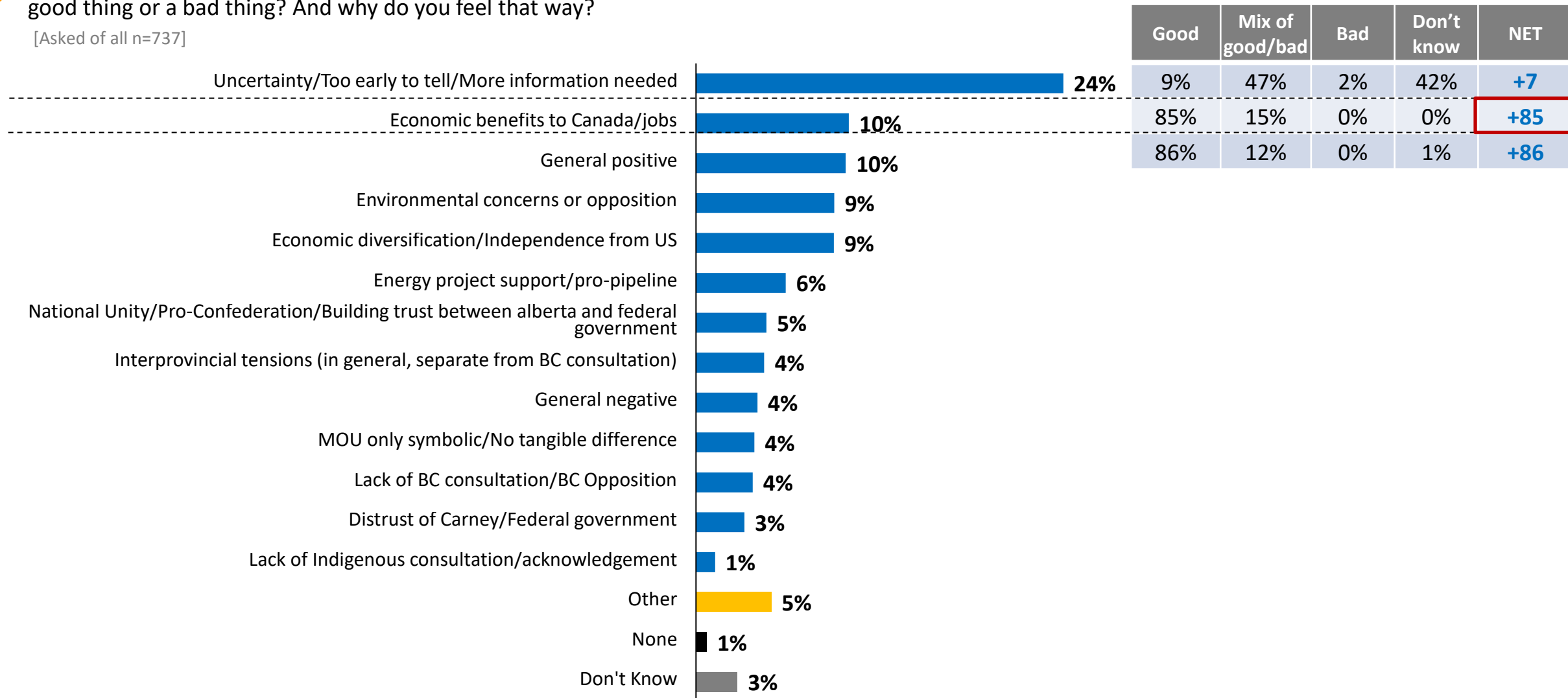
Impact of RSH on MOU (National): 1-in-4 are uncertain; those who have RSH of economic benefits are more likely to have positive views

Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[Asked of all n=737]

Impact by RSH



Note: 'Bad Respondent' (<1%) not shown.

MOU opinions (Verbatims)



From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[Asked of all n=737]

Uncertainty/Too early to tell/More information needed

"Because I mostly heard the pros instead of cons but once I have enough info, I will decide."

"Because it may pose new opportunities but some of those might not be good ones."

"Good because it can benefit Canada and bad because it may be more expensive than people think."

Economic benefits to Canada/jobs

"Economically, if implemented, it could create jobs, investment, export growth, and perhaps new industries (carbon capture, clean energy, data-centres, etc.)."

"Canada needs to increase GDP per capital that is not solely based on flipping real estate."

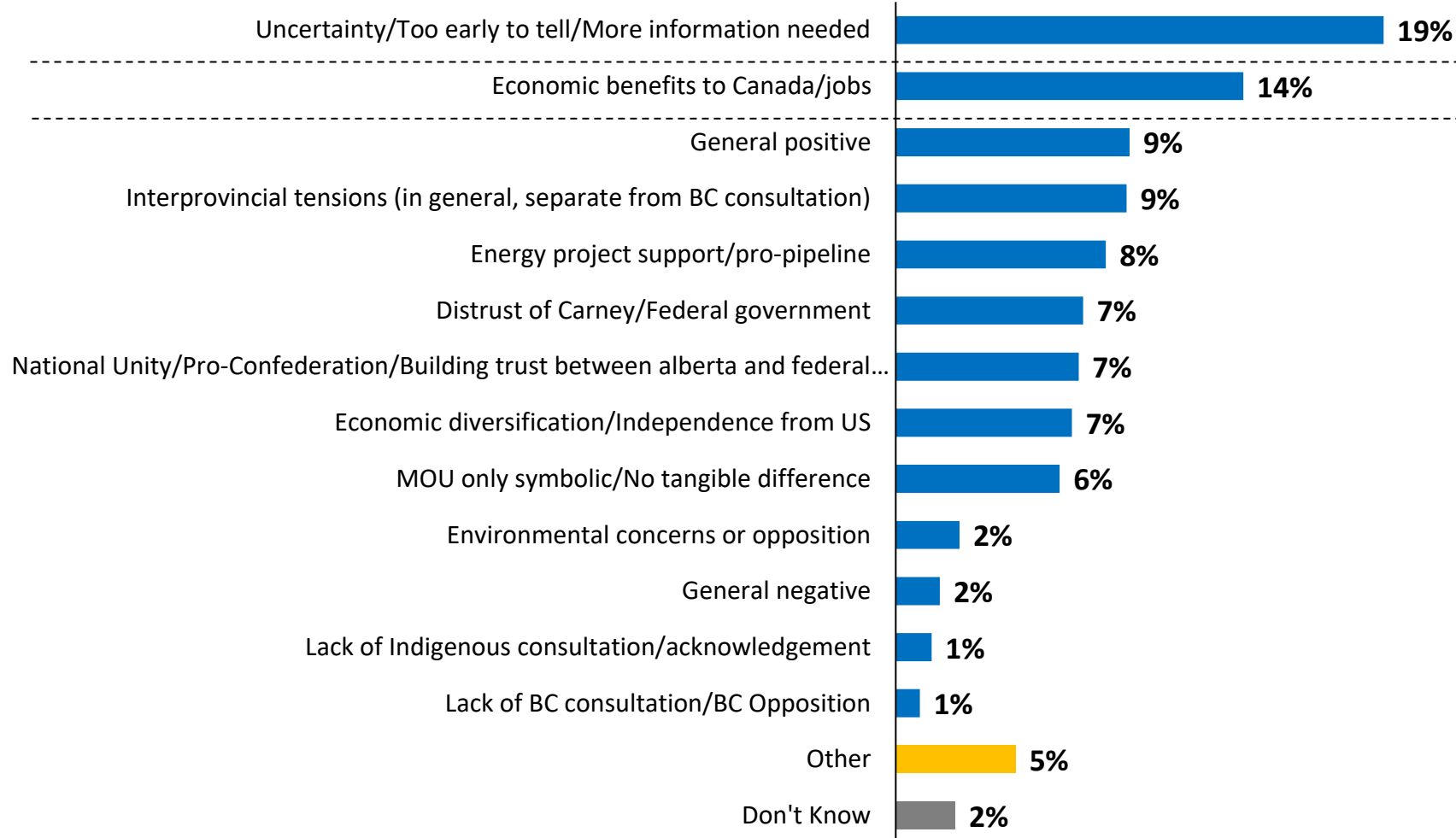
"Canada needs to develop something for our disastrous debt incurred by the irresponsible liberals."

Impact of RSH on MOU (Alberta): 19% are still uncertain about how they feel; 14% think it will bring economic benefits

Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[Asked of all n=120]



Impact by RSH

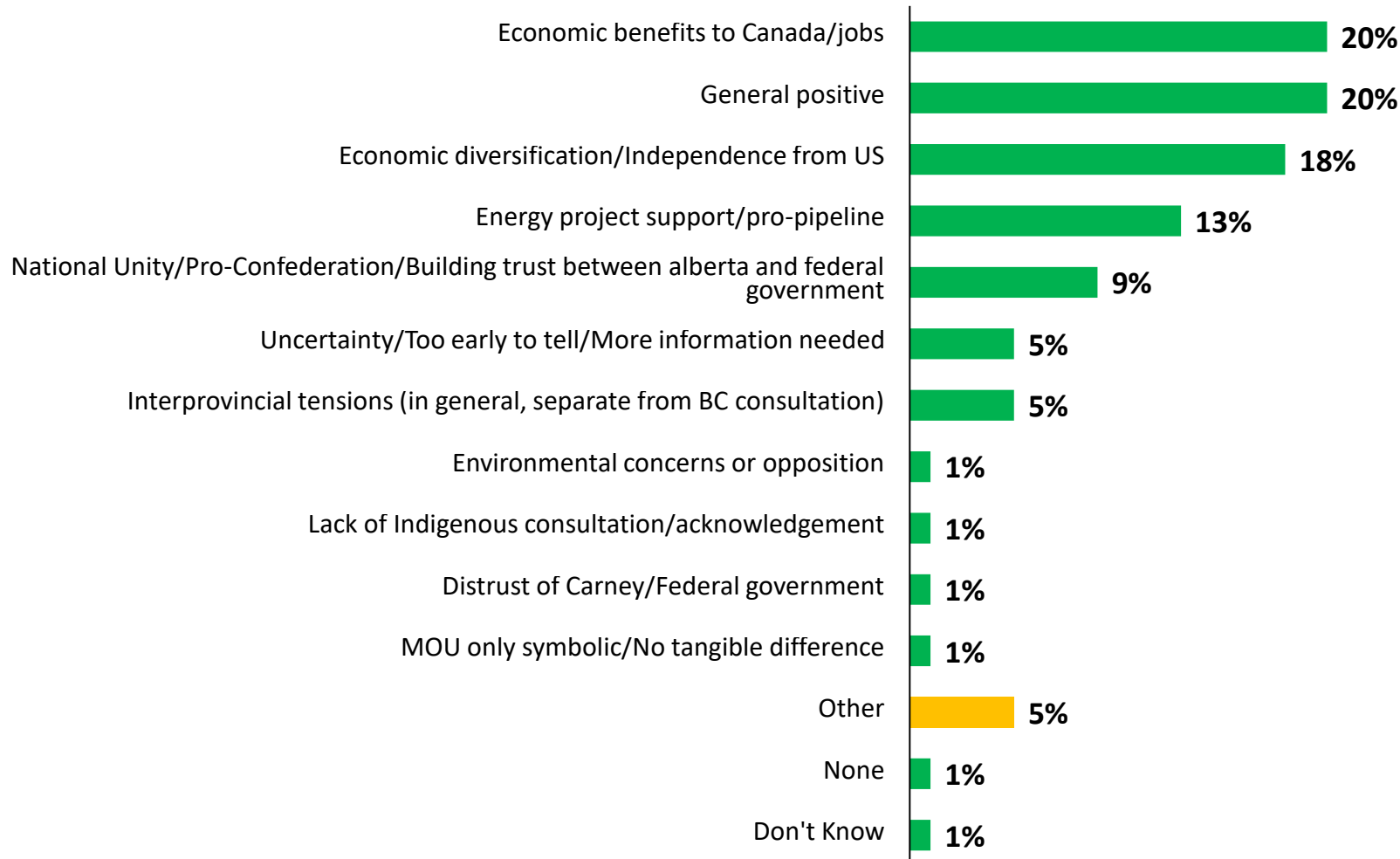
Good	Mix of good/bad	Bad	Don't know	NET
17%	59%	0%	24%	+17
75%	25%	0%	0%	+75
83%	17%	0%	0%	+83

Reasons for Positive Impressions of MOU (National): Among those who say MOU is a good thing, 1-in-5 mention Canada's economy

Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[those who recall RSH MOU and say it is a "good" thing n=313]

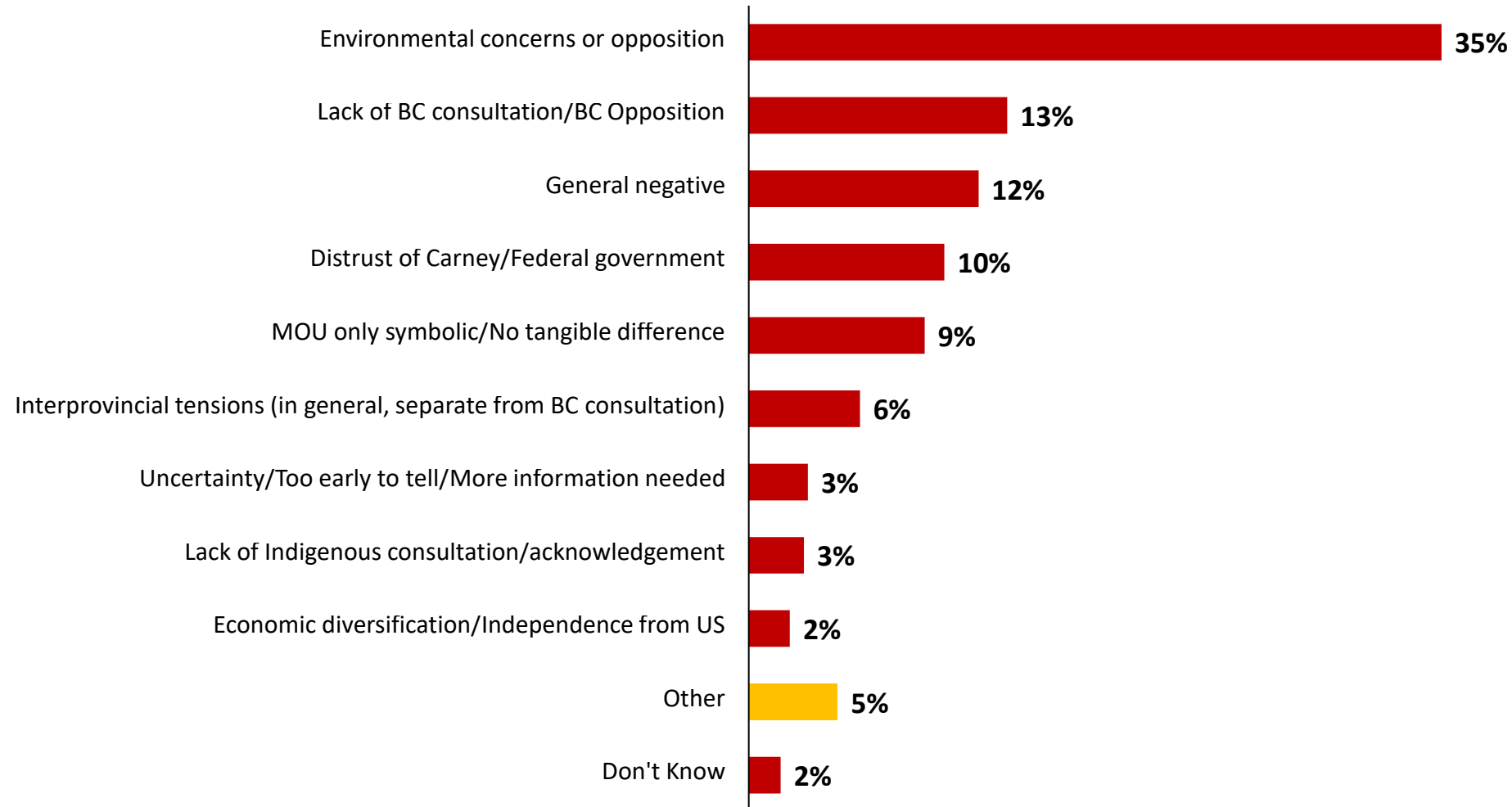


Reasons for Negative Impressions of MOU (National): Over one-third of those who think MOU is a bad thing have environmental concerns

Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[those who recall RSH MOU and say it is a “bad” thing n=95]



Note: 'Bad Respondent' (1%) not shown.

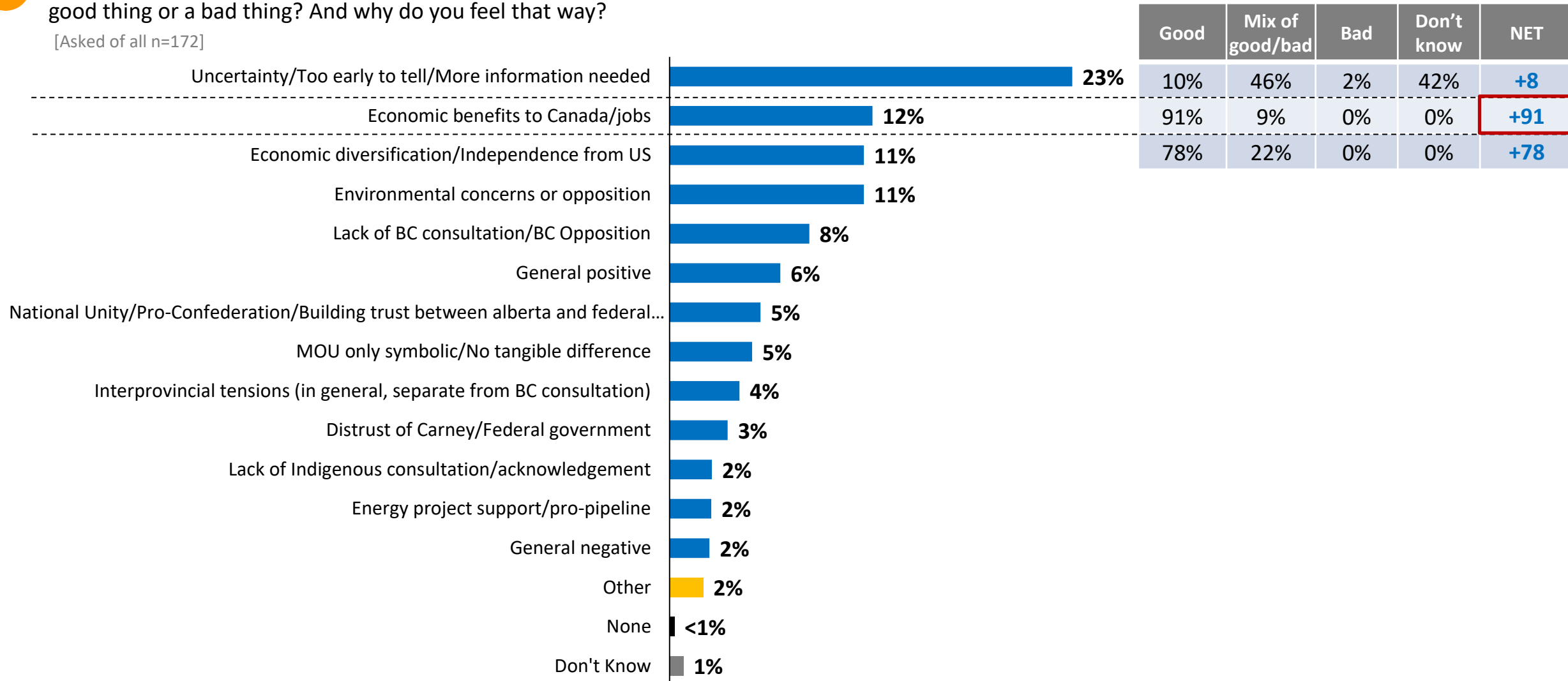
Impact Of RSH On MOU (BC): 1-in-4 are uncertain; while 12% see it as economic improvements, 91% of whom say it's good

Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[Asked of all n=172]

Impact by RSH



Impact Of RSH On MOU (QC): Uncertainty about MOU, is the top-mentioned, followed by environmental concerns with -57 net impact

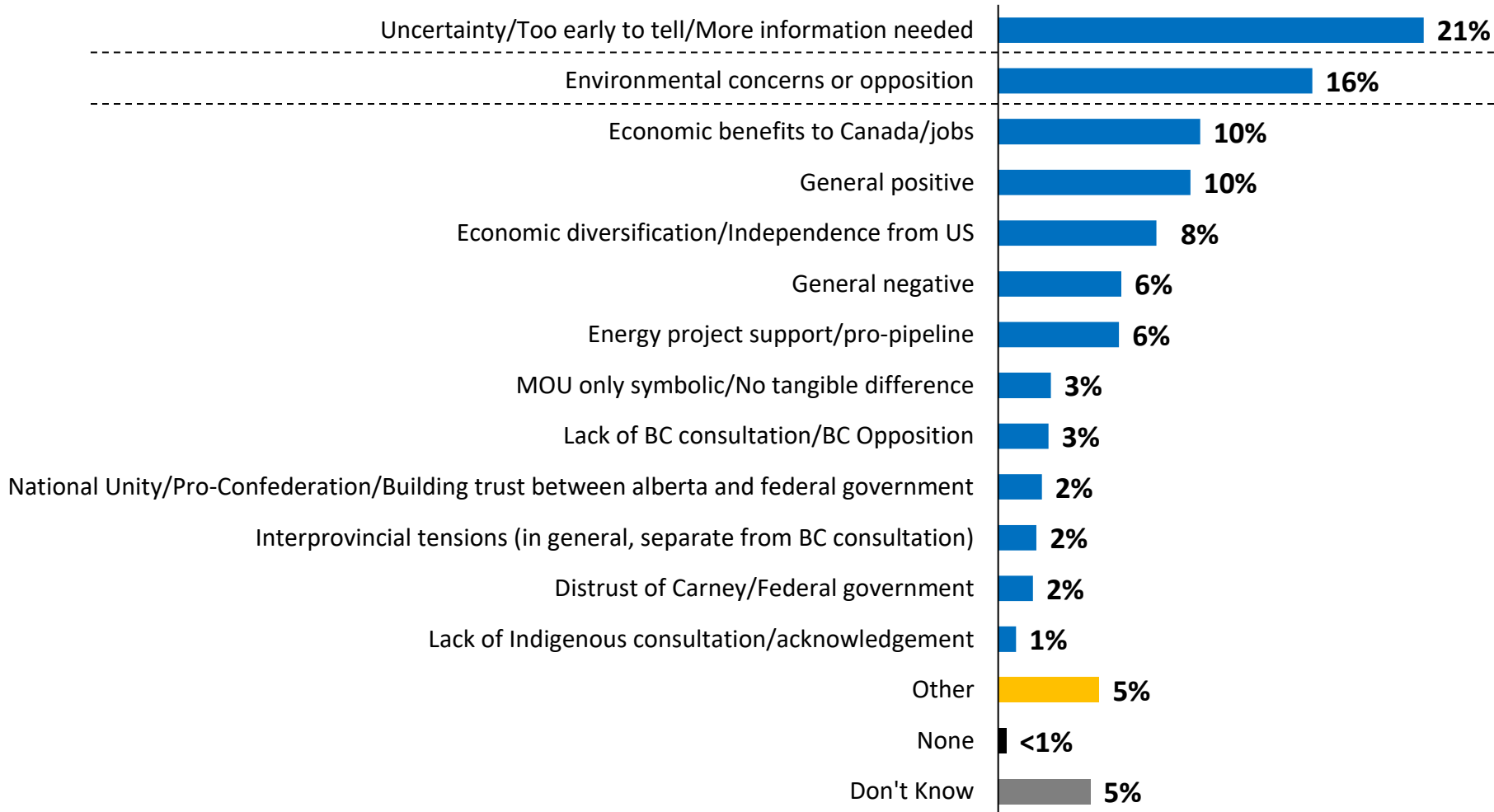
Q

From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing? And why do you feel that way?

[Asked of all n=239]

Impact by RSH

Good	Mix of good/bad	Bad	Don't know	NET
5%	46%	4%	45%	+1
4%	34%	61%	0%	-57
72%	28%	0%	0%	+72



Note: 'Bad Respondent' (1%) not shown.

MOU – Aided Perception

Aided Recall – Description of the MOU

Prime Minister Mark Carney and the federal government, together with Premier Danielle Smith and the Alberta government, have announced a Memorandum of Understanding (MOU) how to develop Alberta's energy sector and make Canada an energy superpower. Some of the details include:

Ottawa designating a proposed new private sector financed and built bitumen pipeline as a project of "national interest," which triggers powers under C-5, the Building Canada Act that Carney's government passed in June.

- That designation means the pipeline — and possibly the tankers associated with transporting the oil — could be exempted from some federal environmental laws.
- The agreement will advance the development of Pathways Plus, the world's largest carbon capture, utilisation and storage project which will allow Alberta to export some of lowest carbon-intensity oil in the world.
- The agreement includes a commitment to an industrial carbon price.
- The agreement includes a plan to reduce methane emissions by 75% over the next decade.
- The agreement includes initiatives to enable Alberta to build and operate competitive nuclear generation and improved electricity interties with BC and Saskatchewan. This will help better supply low-carbon, low-cost electricity across all three provinces which, in turn, can help power new data centres and increased AI computing capacity.

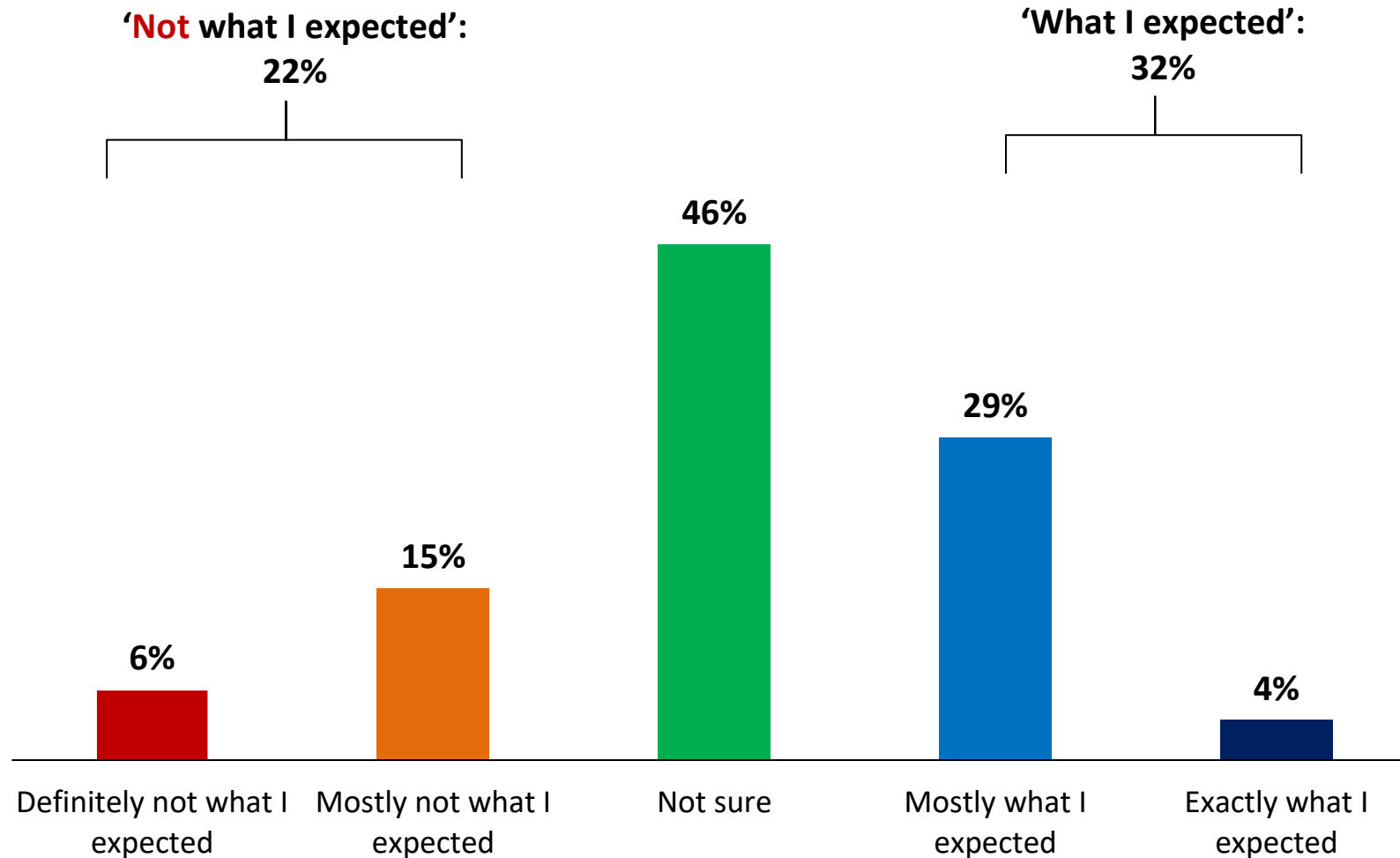
Once some Indigenous consultation and negotiations with B.C. take place, Alberta, as the current proponent of this pipeline, will present its plan to the Major Projects Office (MPO) for expedited review by July 1, 2026.

MOU Living to Expectations: 32% what was announced matches expectations, particularly among Differential Conservatives (41%)



Based on what you have just read, is this what you expected to see announced in the agreement?

[asked of all, n=1,250, oversamples in AB, BC, QC]



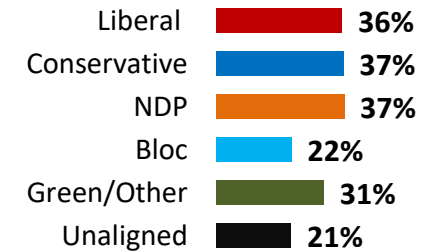
Segmentation

Respondents who say MOU is "What I expected"

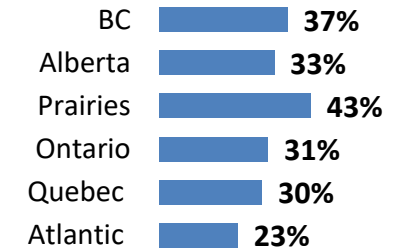
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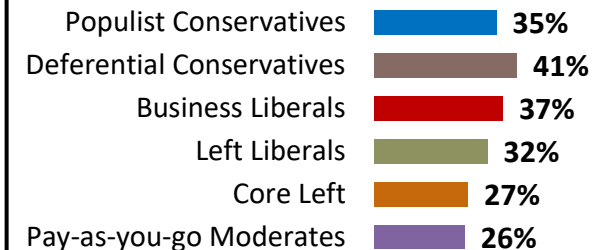
Party ID



Region



Value clusters

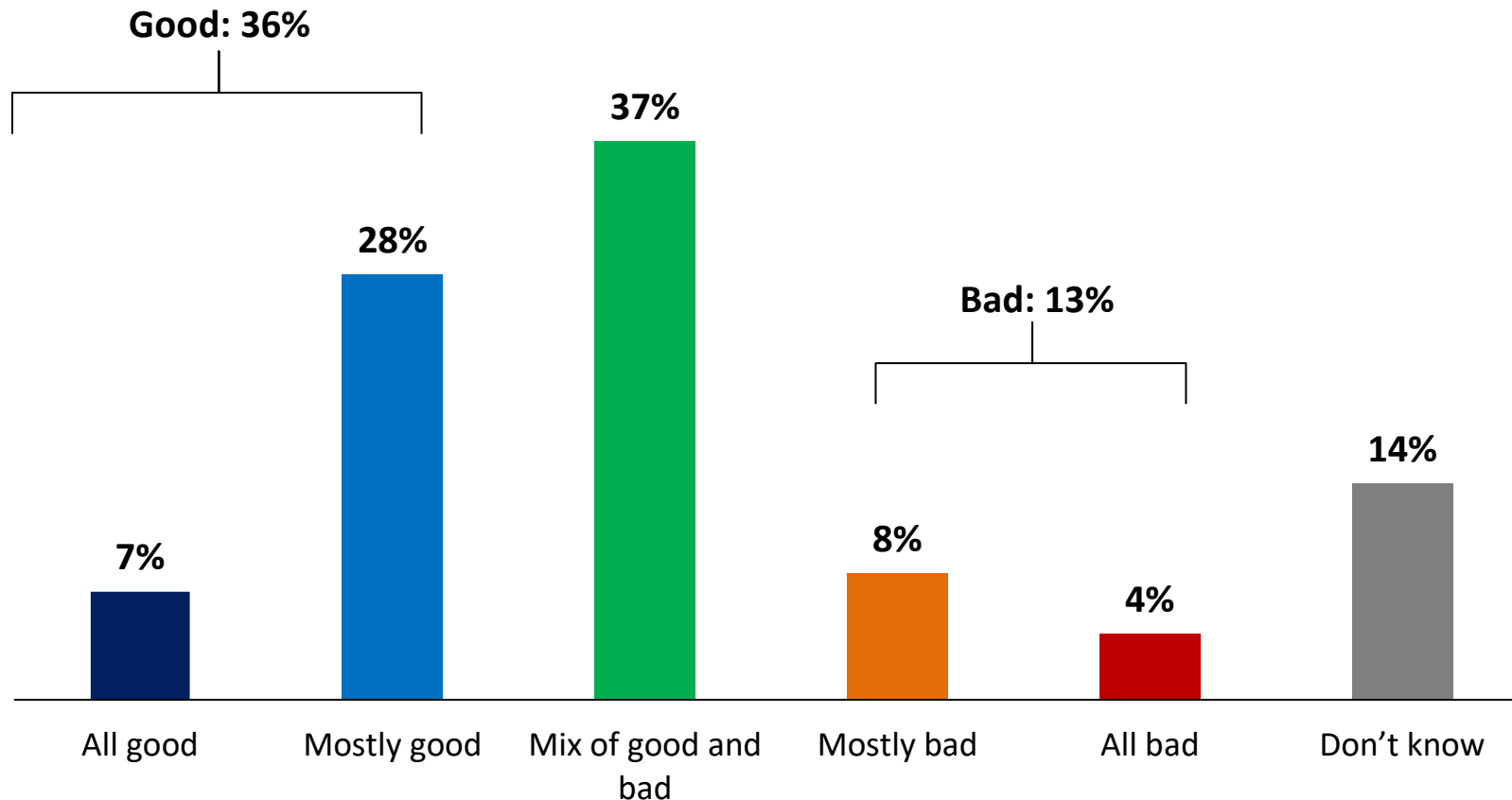


Aided Impression: After hearing the details about the MOU, 36% of Canadians say that the MOU sounds like a good thing



Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?

[asked of all respondents, n=1,250, oversamples in AB, BC, QC]



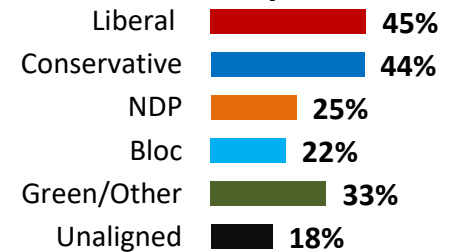
Segmentation

Aided Impression MOU sounds 'Good'

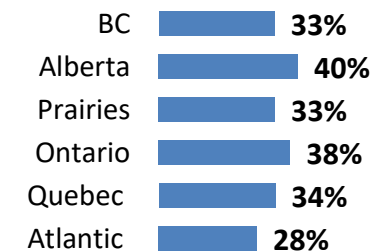
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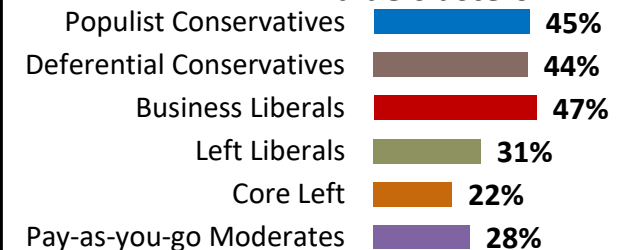
Party ID



Region



Value clusters



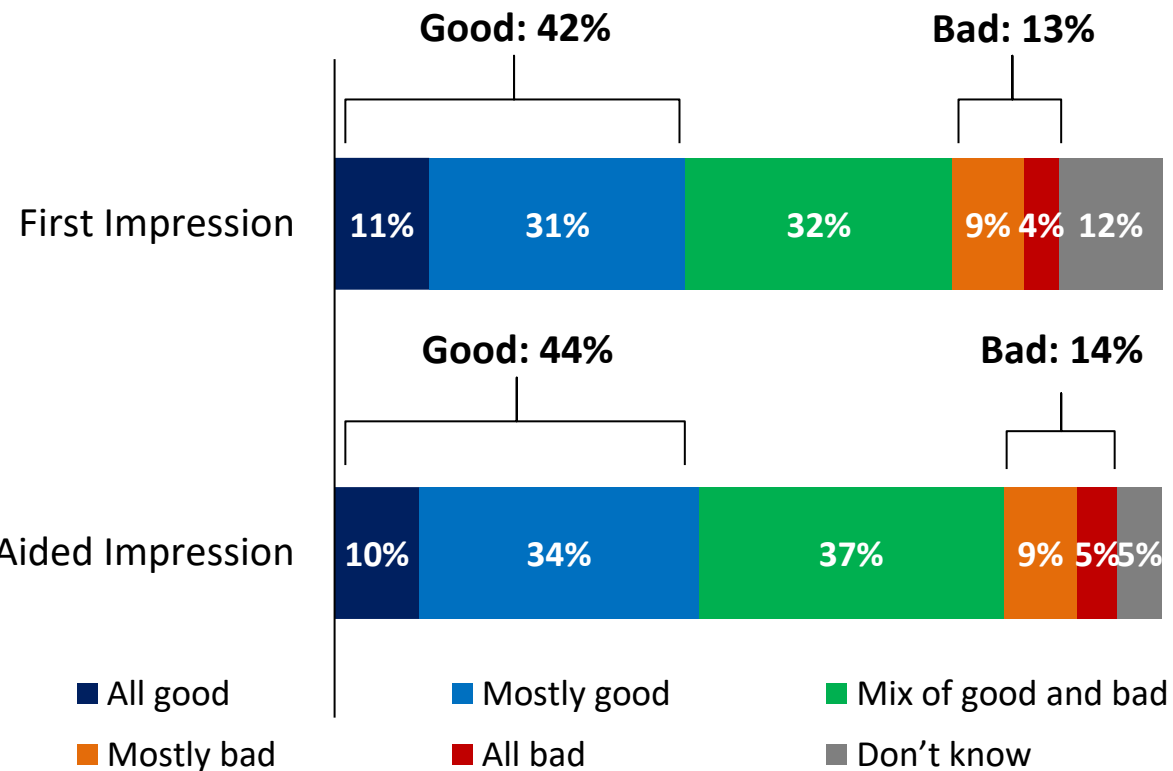
MOU Impression: Those who have **not** heard of MOU are less likely to view it positively, even after learning more about it than those who have



First Impression: From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

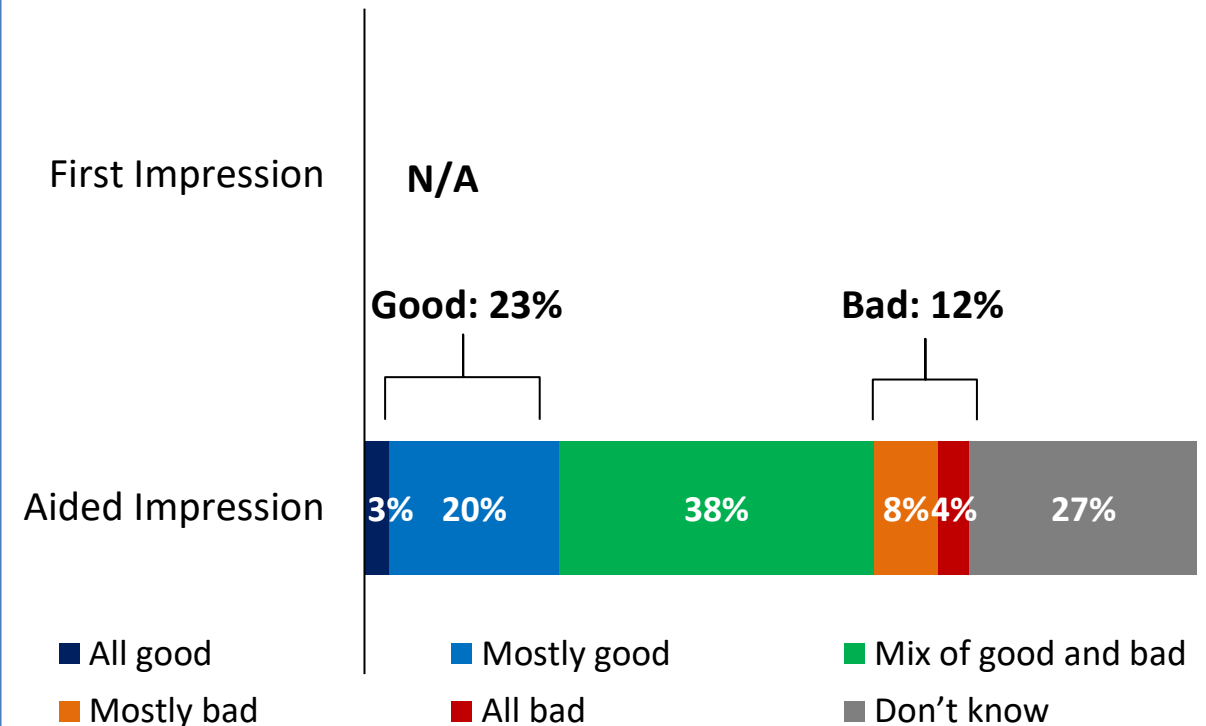
Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?

Those who have heard of MOU prior to the survey



[those that "have heard of" MOU, n=737]

Those who have **not** heard of MOU prior to the survey



[those that have not heard of MOU, n=513]

Aided Impression BY Political Party (Alberta): UCP voters more likely to see it as a good thing than others, who are most likely to see it as a mix



From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

[oversamples in AB n=200]

Combined Alberta Vote

Aided Impression

	The United Conservative Party of Alberta (n=76)	Everyone else (n=124)
All good	8%	11%
Mostly good	40%	23%
Mix of good and bad	28%	45%
Mostly bad	12%	6%
All bad	3%	1%
Don't know	9%	14%
GOOD	48%	34%
BAD	15%	7%

Aided Impression BY Political Party (BC): Close balance of 'good' (33%), 'bad' (26%), and 'mix of good and bad' (33%) among BC's NDP



From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

[oversamples in BC n=250]

Combined BC Vote

Aided Impression		NDP of BC (n=82)	Everyone else (n=168)
	All good	5%	6%
	Mostly good	29%	28%
	Mix of good and bad	33%	40%
	Mostly bad	17%	6%
	All bad	9%	4%
	Don't know	8%	16%
	GOOD	33%	33%
	BAD	26%	10%

MOU Familiarity: Those who did not hear about the plan, once learning³⁴ more about it, are most likely to see it as “mix of good and bad”/“good”



Familiarity: How familiar are you with the just-announced Memorandum of Understanding between the federal and Alberta governments on how to develop Alberta’s energy sector and make Canada an energy superpower?

Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?

[asked of all respondents, n=1,250]

		Familiarity				
Aided Impression		Very familiar and can explain it to others in detail (n=69)	I am familiar with the plan but cannot explain it to others in detail (n=266)	I have heard of a plan, but I don’t know the details (n=402)	I have not heard about a plan before this survey (n=356)	Don’t know (n=157)
	All good	25%	14%	5%	3%	2%
	Mostly good	32%	36%	33%	20%	21%
	Mix of good and bad	25%	34%	41%	41%	31%
	Mostly bad	6%	10%	9%	8%	7%
	All bad	12%	4%	4%	4%	2%
	Don’t know	0%	2%	9%	23%	37%
	GOOD	56%	50%	38%	23%	23%
	BAD	18%	14%	13%	13%	9%

MOU Impression: Just over 1-in-5 who said ‘Mix of good and bad’ for their first impression, say ‘Mostly good’ after given description of MOU



First Impression: From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that are “familiar” with the MOU, n=737]

Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?

[asked of all respondents, n=737]

First Impression

Aided Impression

	All good (n=84)	Mostly good (n=228)	A mix of good and bad (n=237)	Mostly bad (n=64)	All bad (n=31)	Don't know (n=92)
All good	57%	10%	1%	1%	3%	2%
Mostly good	28%	65%	22%	5%	1%	23%
Mix of good and bad	10%	19%	65%	38%	18%	37%
Mostly bad	0%	4%	6%	38%	21%	11%
All bad	3%	<1%	2%	14%	57%	2%
Don't know	2%	2%	4%	3%	0%	25%
GOOD	85%	75%	23%	6%	4%	25%
BAD	3%	4%	8%	52%	78%	13%

MOU Expectations: Those who say that what was announced matches expectations are most likely to have mixed impression about MOU (41%)



MOU Living to Expectations: Based on what you have just read, is this what you expected to see announced in the agreement?

Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?

[asked of all respondents, n=1,250]

		Expectations		
		Not what I expected (n=271)	Not sure (n=405)	What I expected (n=575)
Aided Impression	All good	7%	15%	2%
	Mostly good	32%	40%	18%
	Mix of good and bad	37%	31%	41%
	Mostly bad	13%	7%	7%
	All bad	8%	5%	2%
	Don't know	3%	2%	29%
	GOOD	39%	55%	20%
	BAD	21%	12%	9%

MOU – Attitudes

MOU Attitudes and Impact: Net agree is highest for the statement that MOU is a good way to build a stronger Canadian economy³⁸

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250]

Net Agreement

This agreement is **a good way to build a stronger Canadian economy** and reduce our dependence on the United States.



The deal will **help the Alberta and the Federal** government build mutual trust.



This agreement is a necessary compromise to move forward on **energy policy**.



It was wrong for the federal government to come to an agreement that has such major impacts on BC **without bringing BC** to the table.



It was wrong for the federal government to come to an agreement that has such major **impacts on indigenous peoples** without bringing them to the table.



The deal will **increase political tensions** between Alberta and other provinces.



The MOU sacrifices too much on Canada's **climate commitments**.

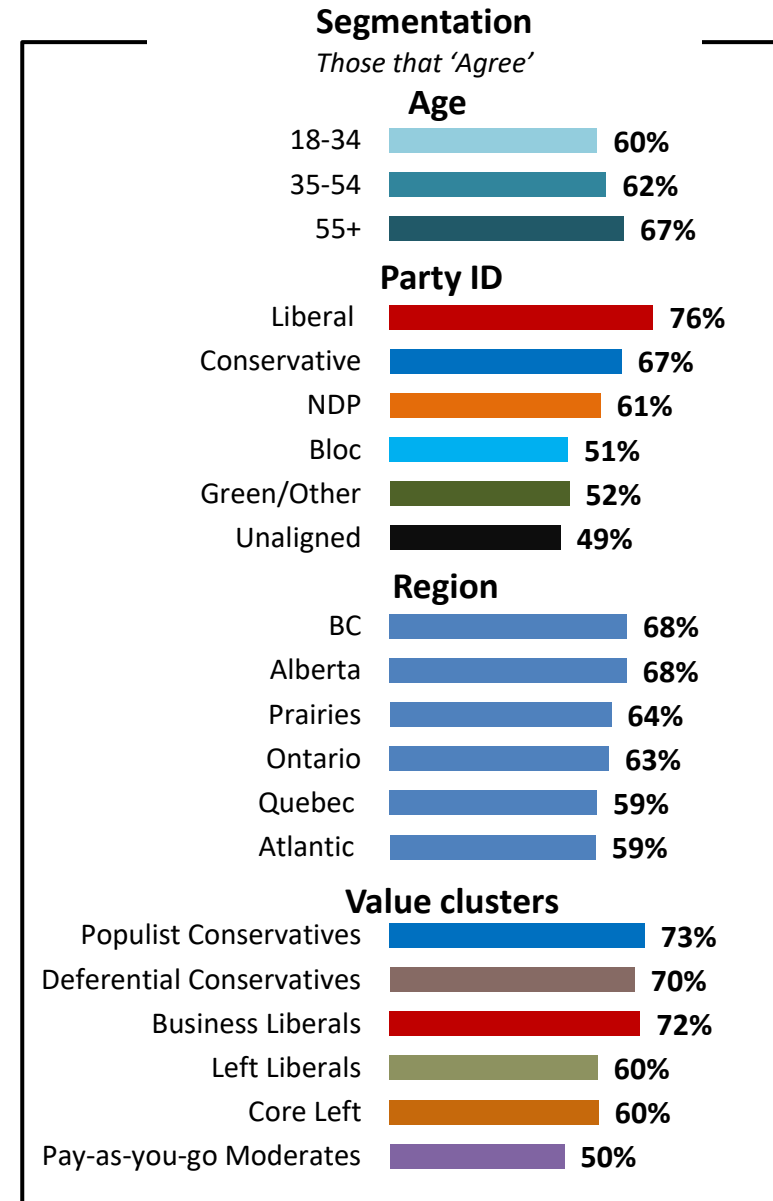
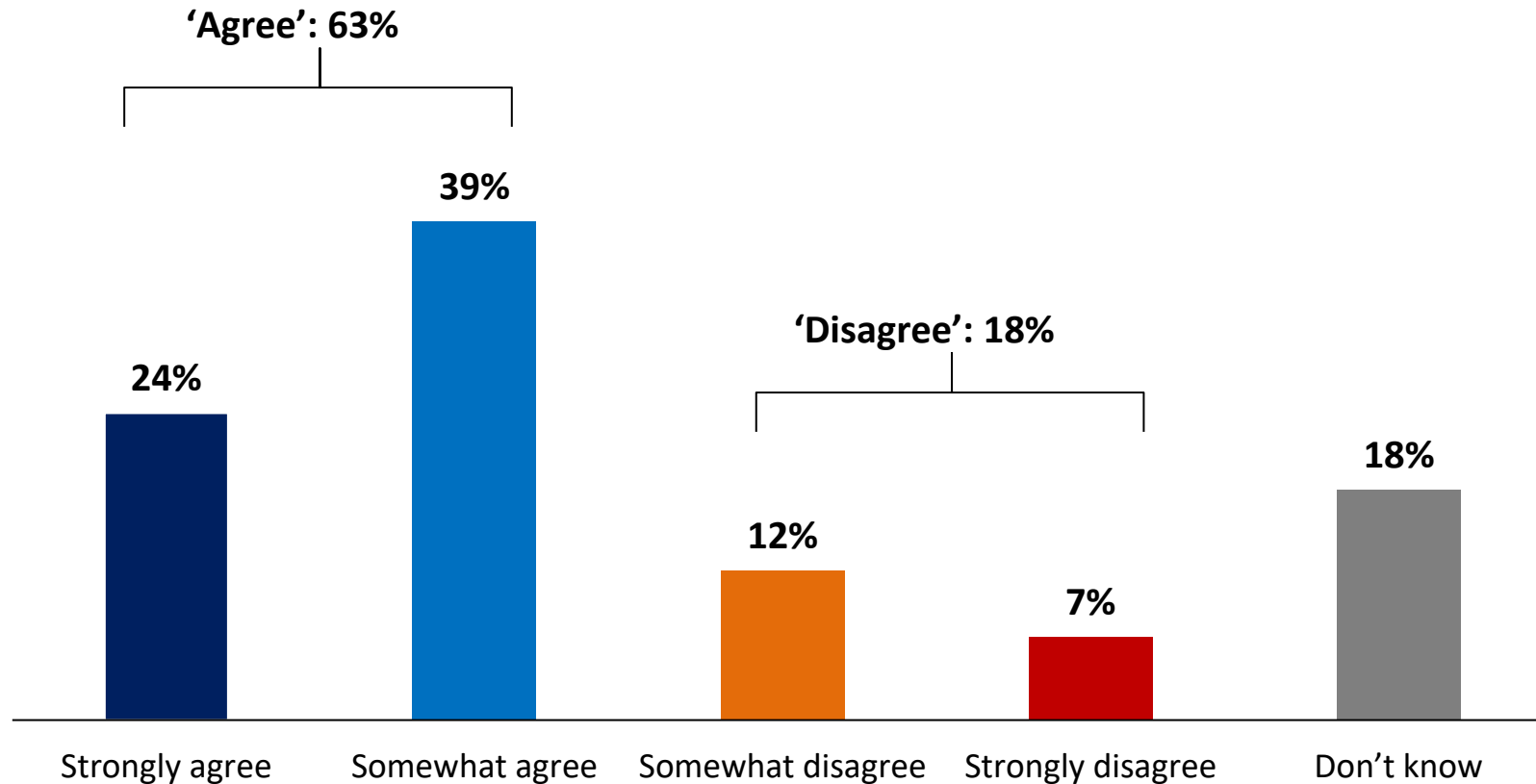


■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know

MOU Build Stronger Canadian Economy: Agreement with this is highest³⁹ among Liberals (76%) and among conservative value clusters

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

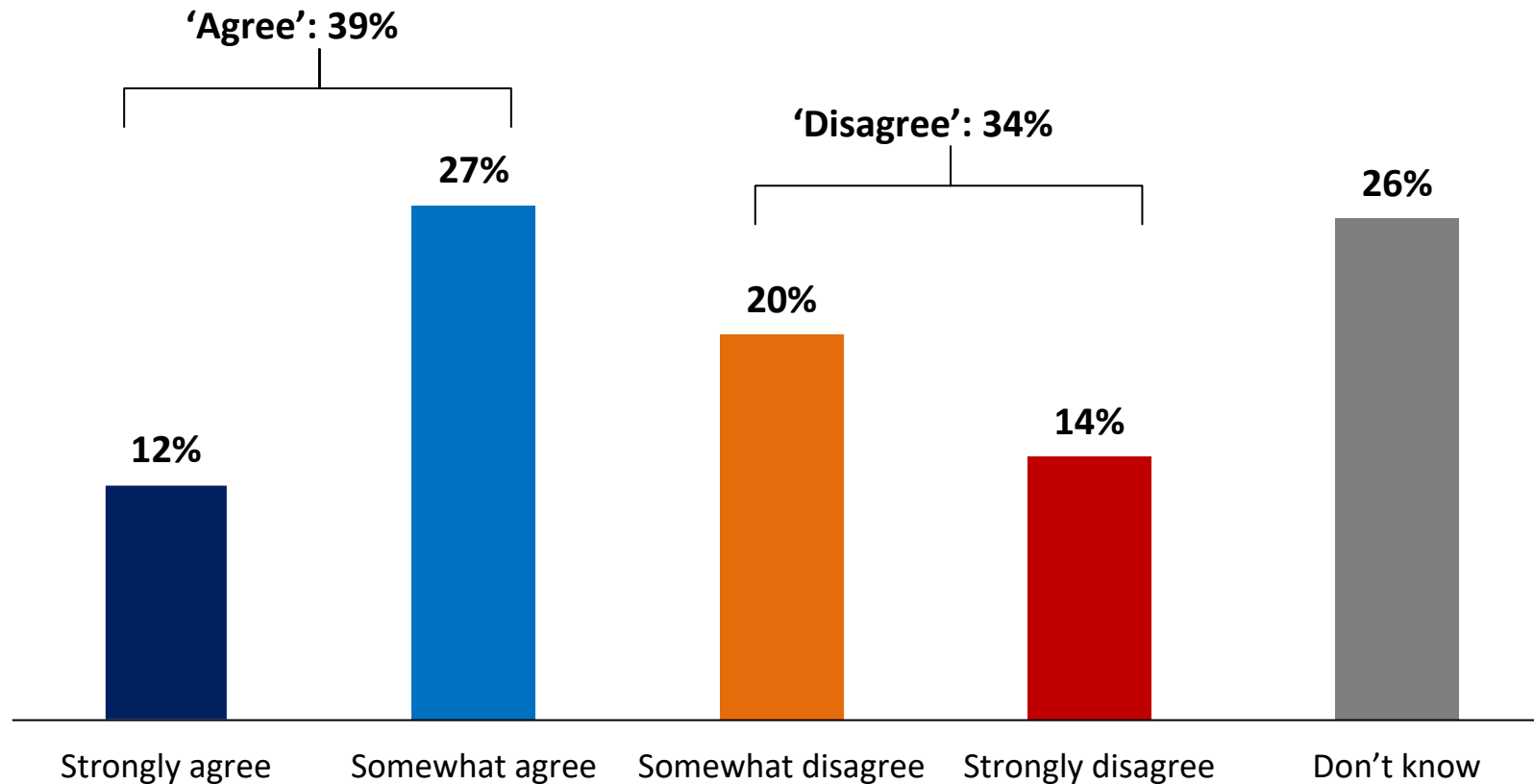
*This agreement is a good way to **build a stronger Canadian economy and reduce our dependence on the United States.***



MOU Sacrificing on Climate Commitments: Nearly 2-in-5 (39%) agree that MOU sacrifices too much on Canada's climate commitments

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

*The MOU sacrifices too much on Canada's **climate commitments***



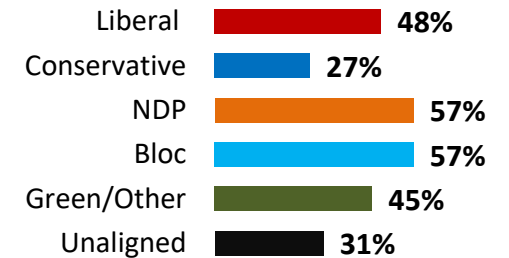
Segmentation

Those that 'Agree'

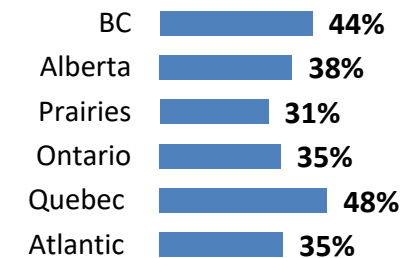
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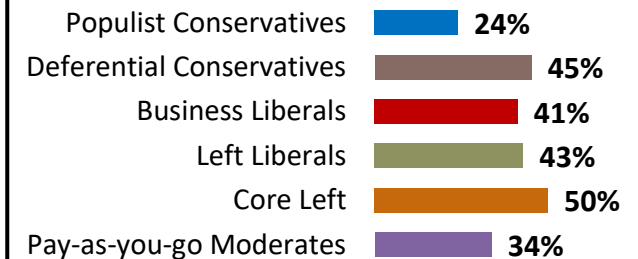
Party ID



Region



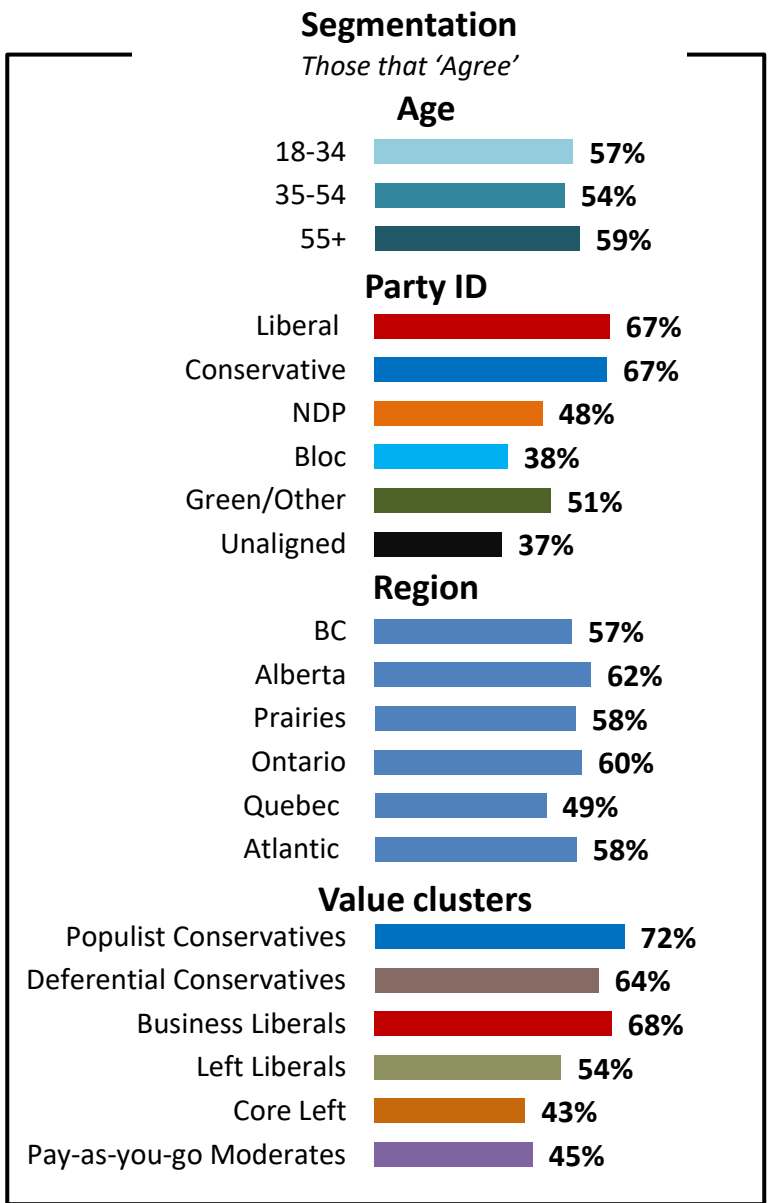
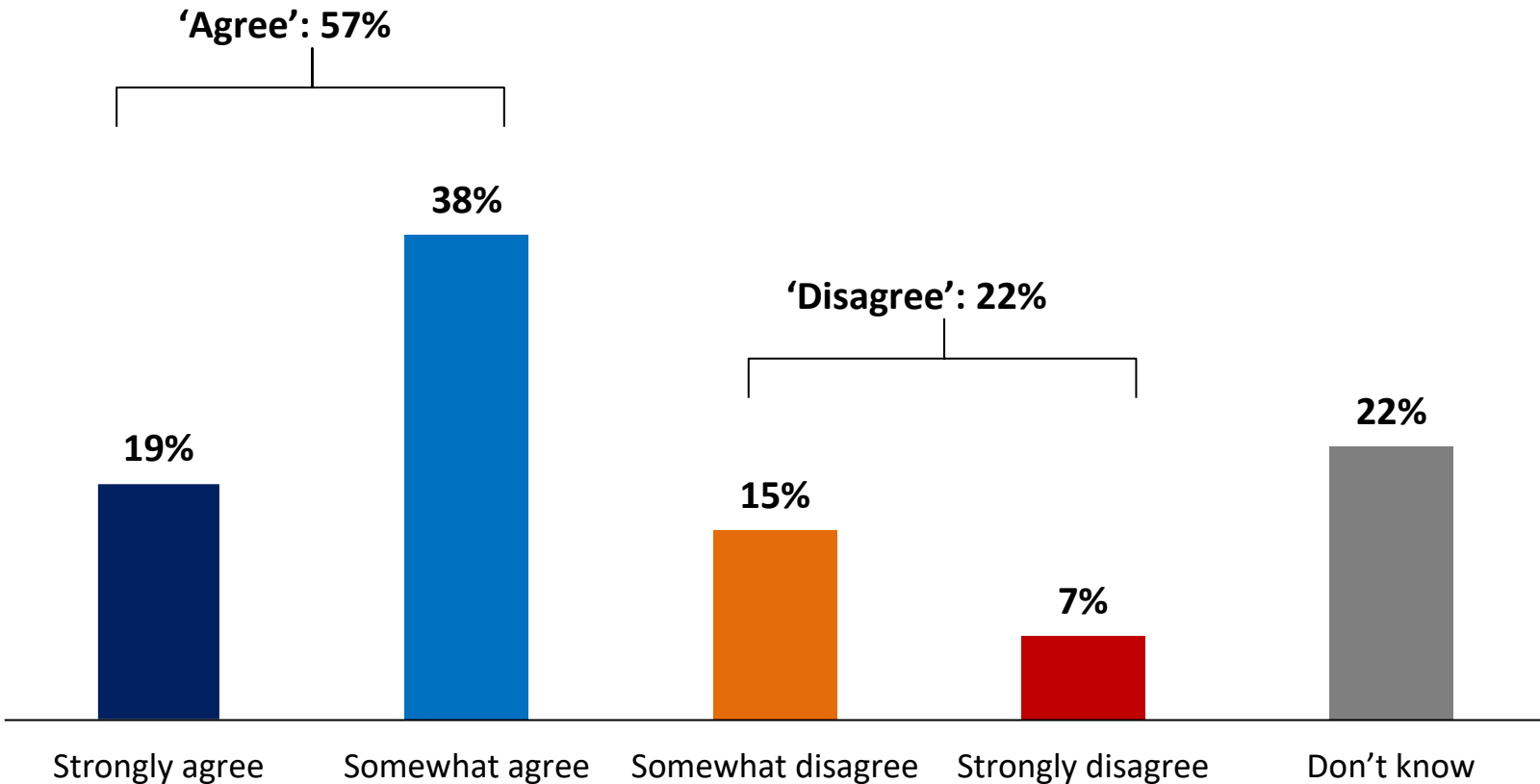
Value clusters



MOU Moving Forward on Energy Policy: Almost 3-in-5 (57%) agree that MOU is a necessary compromise; highest among Populist Conservatives

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

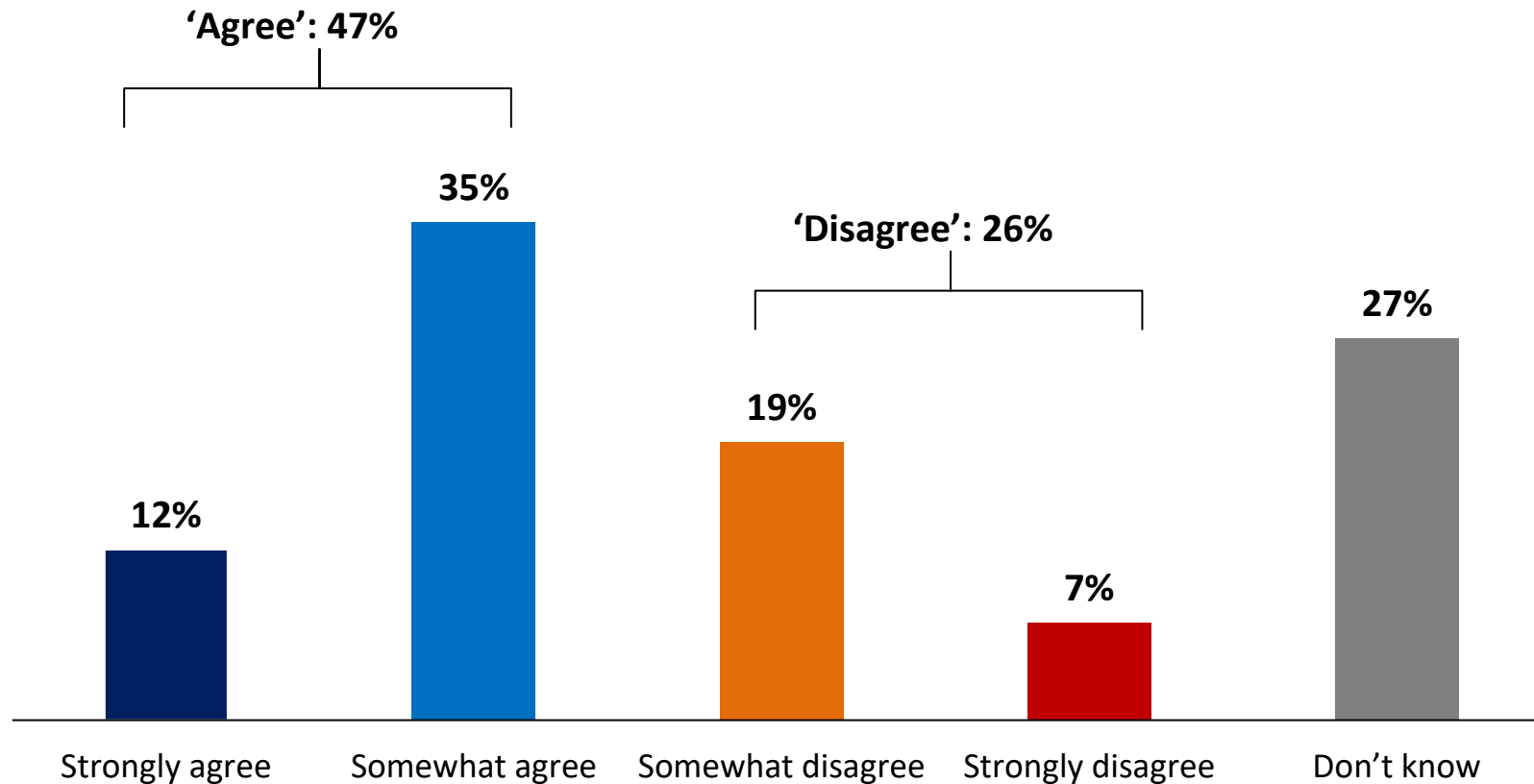
*This agreement is a necessary compromise to **move forward on energy policy**.*



MOU Increasing Provincial Tensions: Almost half (47%) agree that the deal will increase political tensions between Alberta and other provinces

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

*The deal will **increase political tensions** between Alberta and other provinces.*



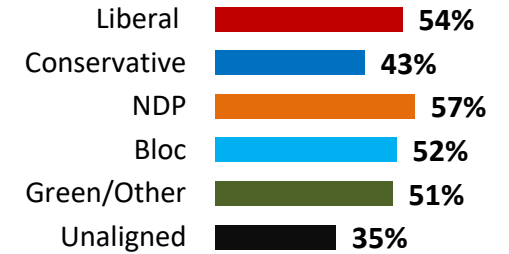
Segmentation

Those that 'Agree'

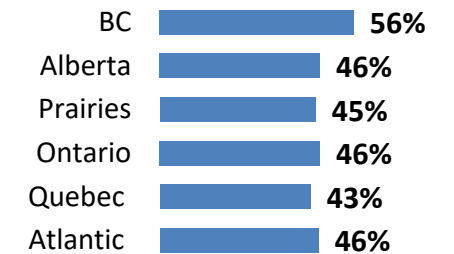
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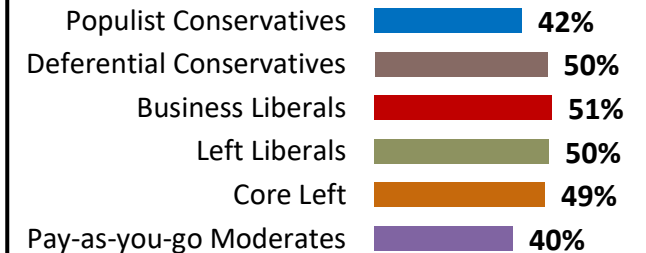
Party ID



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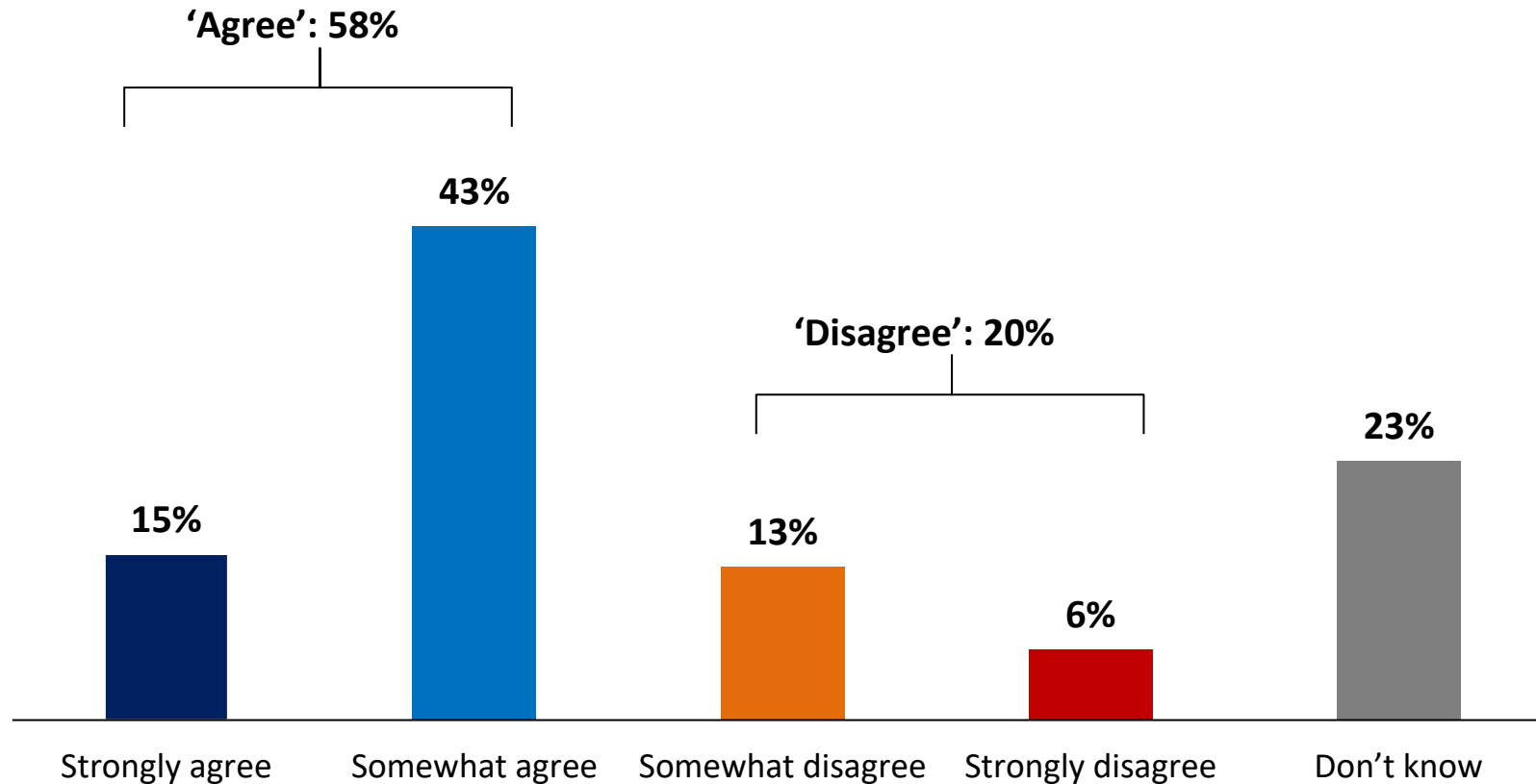
Value clusters



MOU Building Mutual Trust: Nearly 3-in-5 agree that the deal will help the Alberta and the Federal government build mutual trust

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

*The deal will help the **Alberta and the Federal government** build mutual trust.*



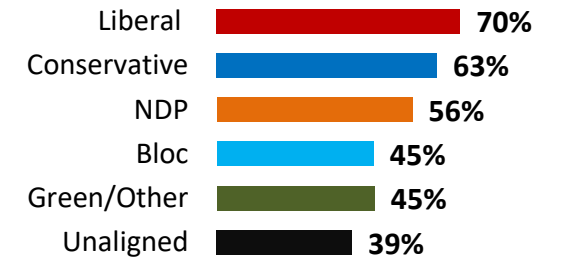
Segmentation

Those that 'Agree'

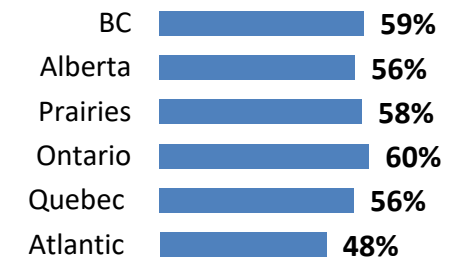
Age



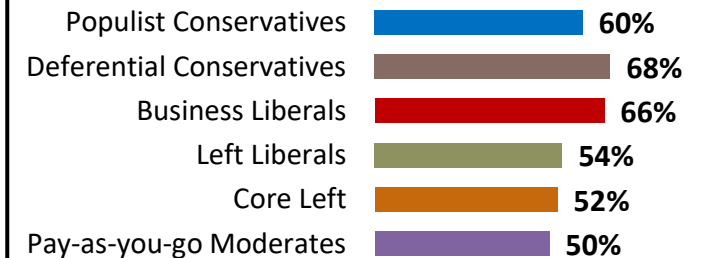
Party ID



Region



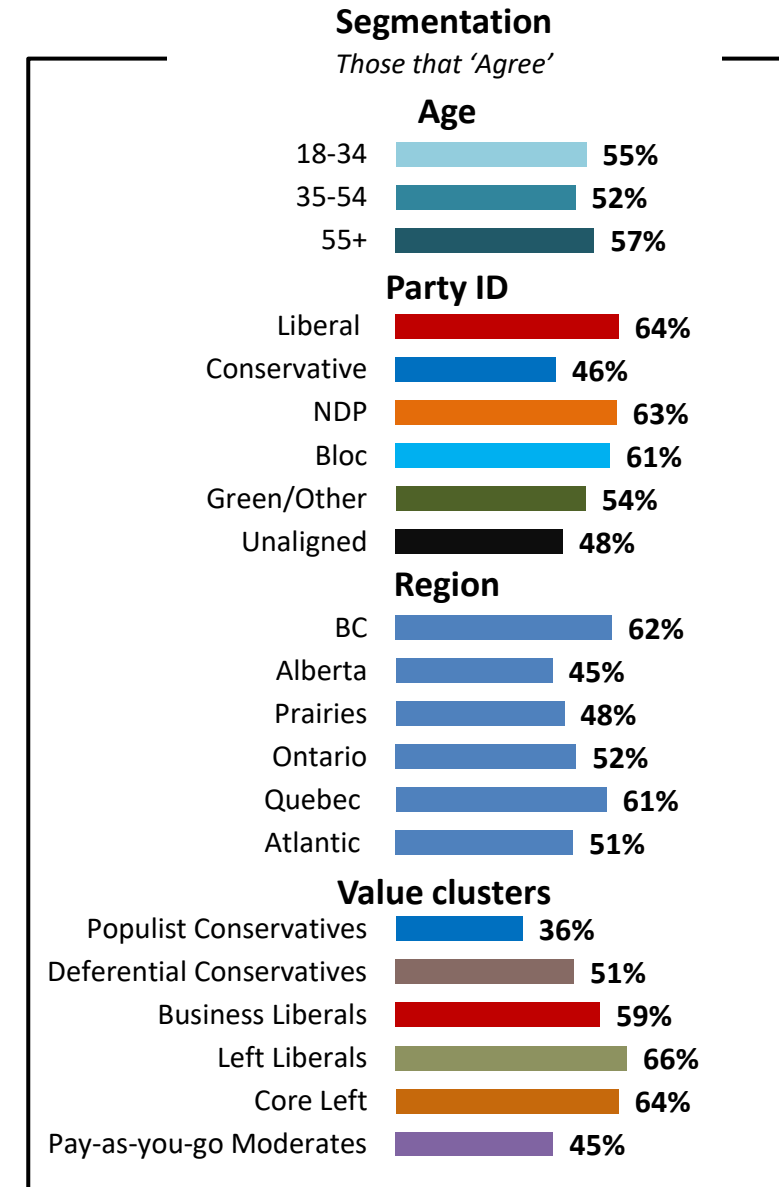
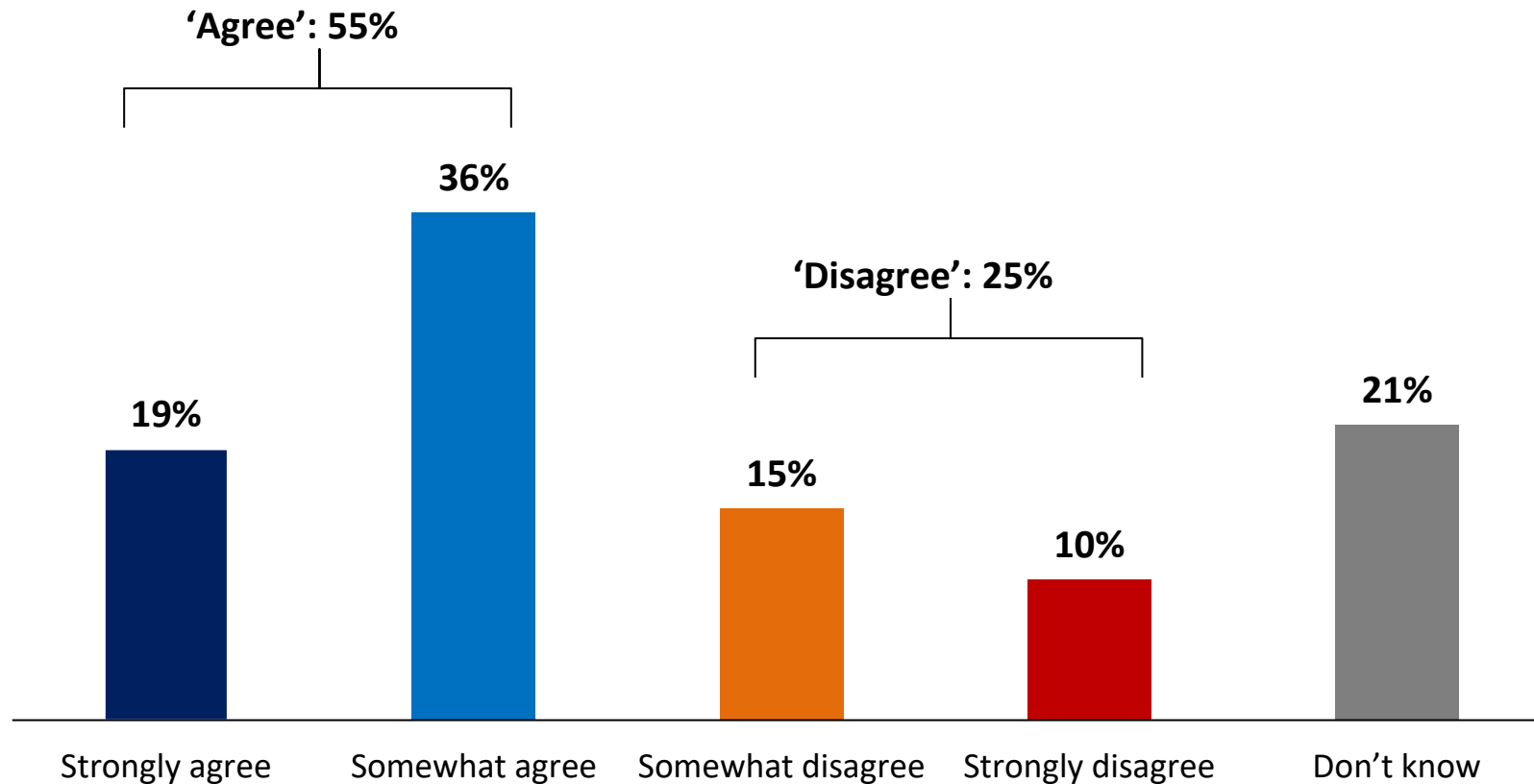
Value clusters



MOU Impact on BC: Over half (55%) agree that it was wrong not to bring BC to the table; highest agreement among liberals (64%) & Left-leaning

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

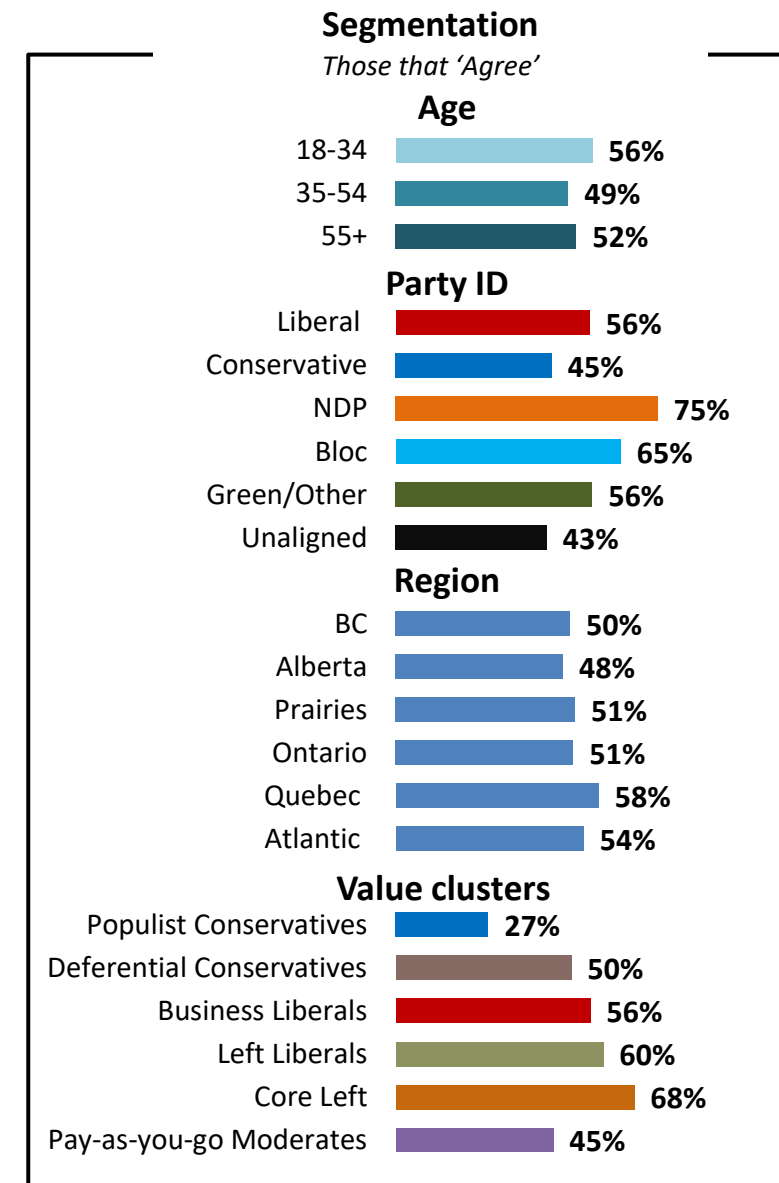
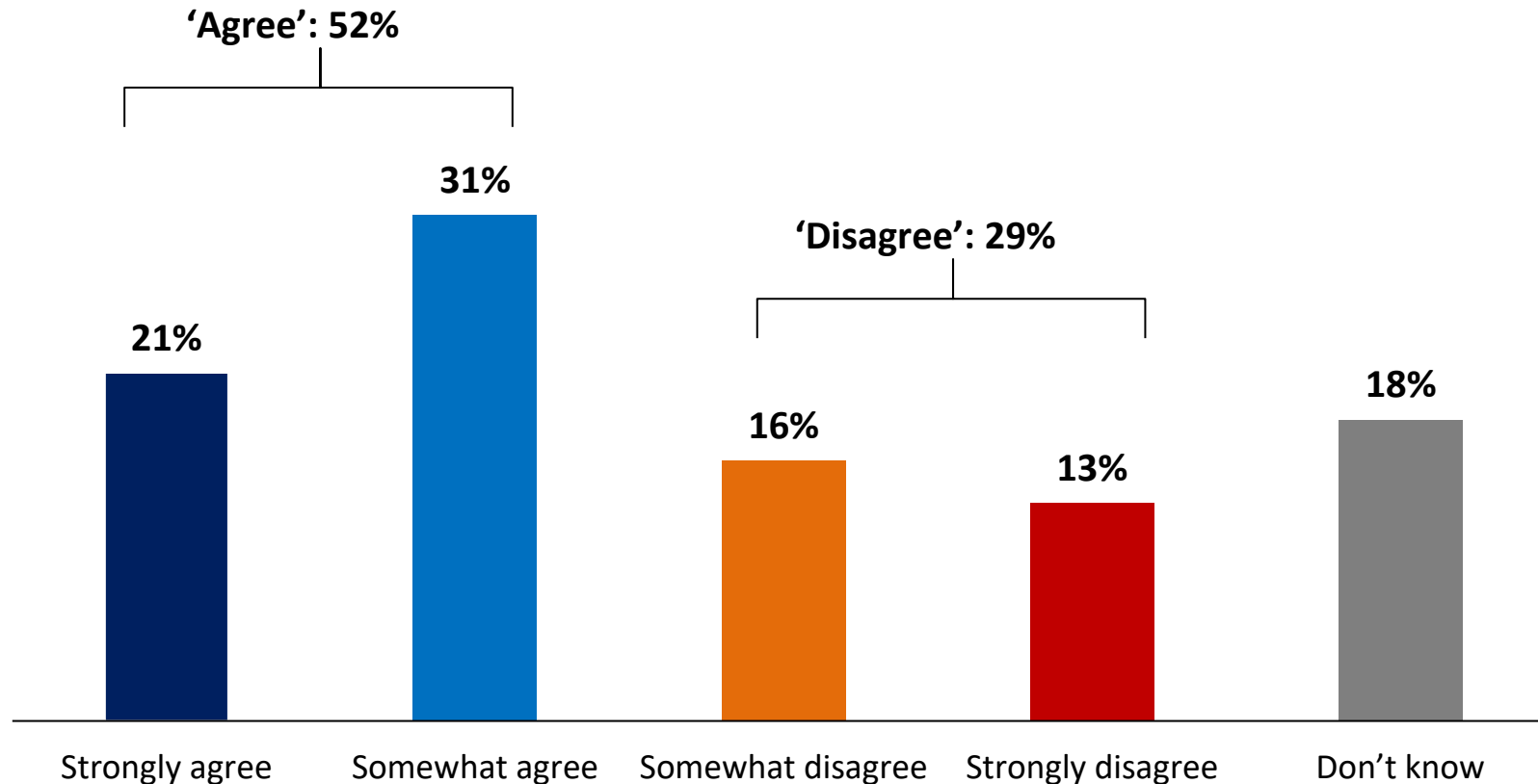
*It was wrong for the federal government to come to an agreement that has such major impacts on BC **without bringing BC to the table.***



MOU Impact on Indigenous People: Half (52%) agree that it was wrong to not bring indigenous people to the table; highest among NDP

Q Do you agree or disagree with the following statements about the proposed MOU?
[asked of all respondents, n=1,250, oversamples in AB, BC, QC]

*It was wrong for the federal government to come to an agreement that has such major **impacts on indigenous peoples** without bringing them to the table.*



Support Narrative For MOU: The economic argument, moving forward on energy policy, and building mutual trust form core support narrative



Do you agree or disagree with the following statements about the proposed MOU?

Based on what you have just read, is this what you expected to see announced in the agreement?

[asked of all respondents, n=1,250]

MOU Expectations

MOU Attitudes

	Not what I expected n=271	What I expected n=405
This agreement is a good way to build a stronger Canadian economy and reduce our dependence on the United States.	64%	81%
The deal will help the Alberta and the Federal government build mutual trust.	58%	76%
This agreement is a necessary compromise to move forward on energy policy.	57%	75%
It was wrong for the federal government to come to an agreement that has such major impacts on indigenous peoples without bringing them to the table.	66%	53%
It was wrong for the federal government to come to an agreement that has such major impacts on BC without bringing BC to the table.	63%	59%
The deal will increase political tensions between Alberta and other provinces.	58%	52%
The MOU sacrifices too much on Canada's climate commitments.	56%	40%

Methodology

Survey Methodology – November 27 to December 1, 2025



These are the results of an online survey conducted between November 27, 2025 to December 1, 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=1,846 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,250 based on Census data from Statistics Canada.

Field Dates: November 27, 2025 to December 1, 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	193	167	10.5%	13.4%
Men 35-54	281	199	15.3%	15.9%
Men 55+	409	239	22.2%	19.2%
Women 18-34	219	165	11.9%	13.2%
Women 35-54	301	208	16.4%	16.7%
Women 55+	437	270	23.8%	21.6%
British Columbia	327	174	17.7%	13.9%
Alberta	190	139	10.3%	11.1%
Prairies	102	84	5.5%	6.7%
Ontario	618	483	33.5%	38.6%
Québec	489	288	26.5%	23.0%
Atlantic	120	84	6.5%	6.7%



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Building Understanding.

