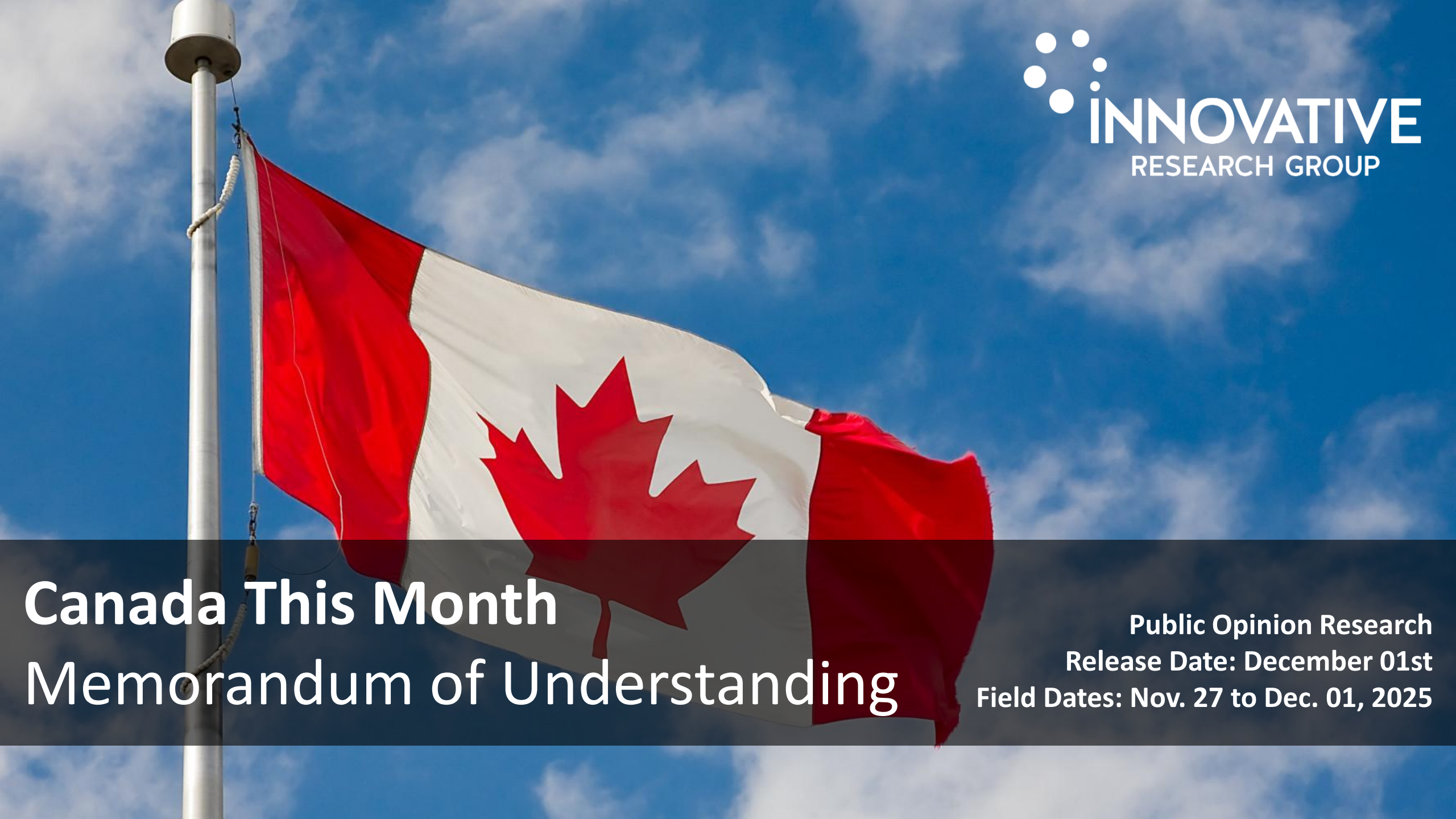




Canada This Month Memorandum of Understanding

Public Opinion Research
Release Date: December 01st
Field Dates: Nov. 27 to Dec. 01, 2025

Table of Contents

Key Findings	3
MOU – First Impression	4
MOU – Aided Impression	7
MOU Attitudes	14
Methodology	16

Key Findings

1

Most Canadians are not paying much attention to the MOU. 27% Canadians say they are familiar with the MOU, with engagement highest in Alberta (40%) and British Columbia (34%). Awareness is notably driven by the Populist Conservative value cluster; 40% say they are aware.

2

Based on initial familiarity only, the first impression is moderately positive. Of those who are familiar, 42% believe the MOU “sounds like a good thing,” including a majority of Albertans (54%). Support is more cautious among British Columbians (39%) and Quebecers (37%).

3

Support is lower on “aided awareness”. All respondents are asked to react after being shown a brief description based on the federal government release. After reading the details, support remains positive but is 7 points lower than the initial impression. We are not seeing initial support go down but rather those who were not initially familiar are not as positive. That said, 22% say the announcement is not what they expected.

4

More than 6 in 10 Canadians say the agreement is a good way to build a stronger Canada. 58% say the agreement will help Alberta and the federal government build mutual trust and 57% say it is a necessary compromise to move forward on energy policy.

5

Process a bigger issue than climate compromises. Over half say it was wrong not to include BC 55% and another 52% say it was wrong not to include Indigenous people. Just 39% say the MOU sacrifices too much on Canada’s climate commitments.

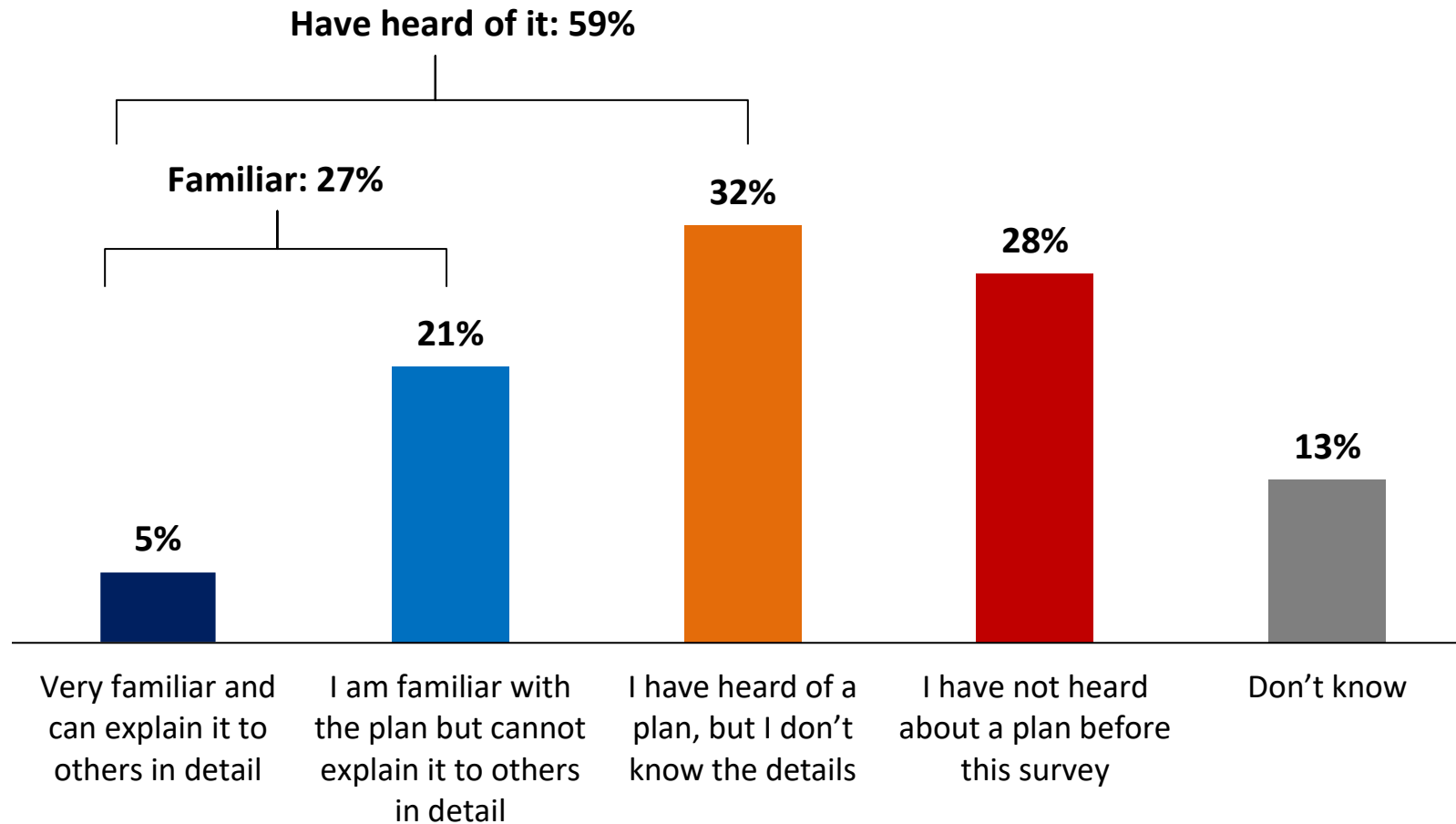
MOU – First Impression

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



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]



Segmentation

Respondents who say 'Familiar'

Age

18-34	23%
35-54	27%
55+	29%

Party ID

Liberal	27%
Conservative	31%
NDP	26%
Bloc	25%
Green/Other	37%
Unaligned	17%

Region

BC	34%
Alberta	40%
Prairies	31%
Ontario	21%
Quebec	26%
Atlantic	23%

Values Clusters

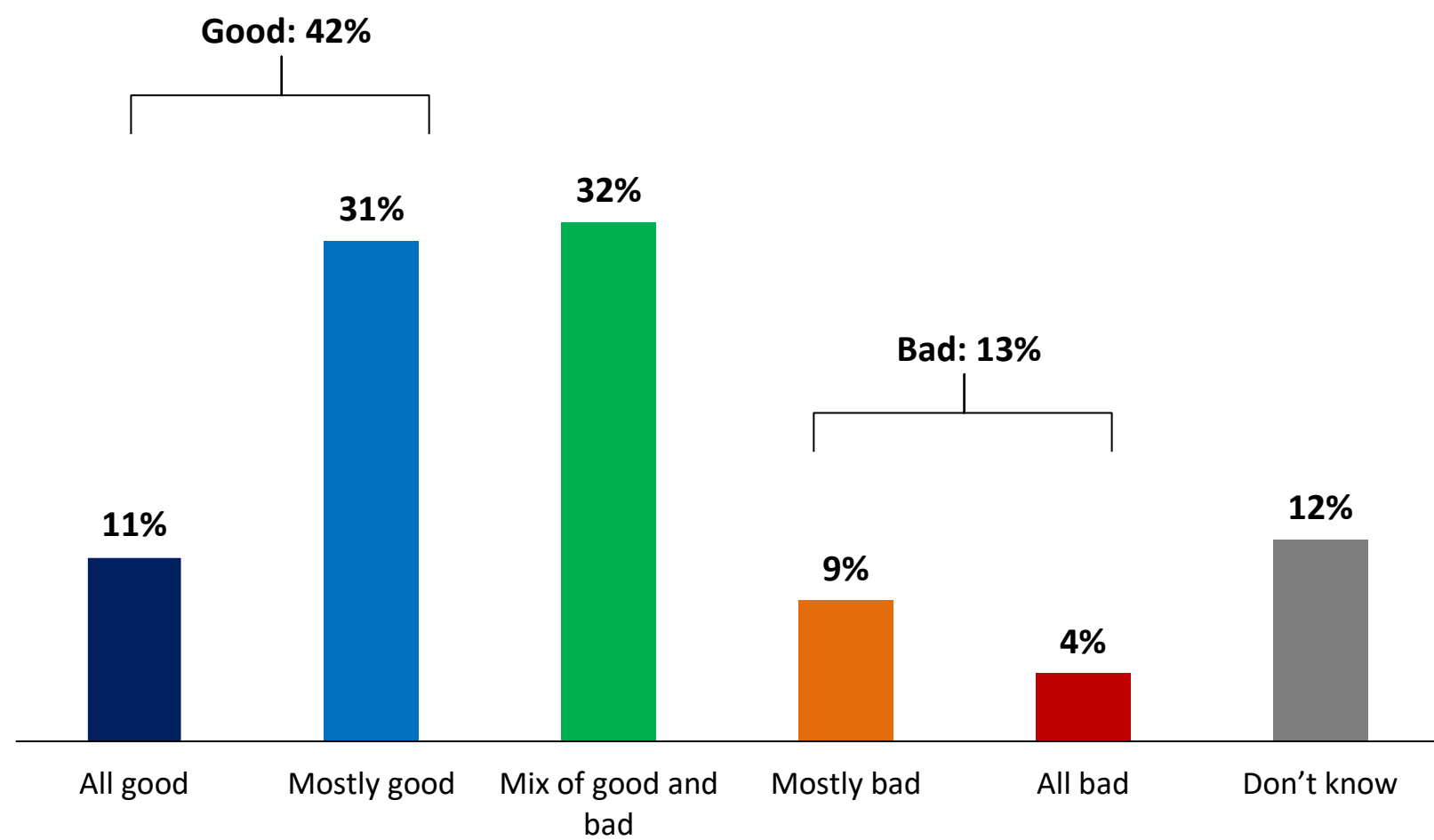
Populist Conservatives	40%
Deferential Conservatives	28%
Business Liberals	31%
Left Liberals	19%
Core Left	22%
Pay-as-you-go Moderates	22%

First Impression: 42% have mostly a good impression, among which are 54% of Albertans vs 39% of British Columbians and 37% of Quebecers



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 "have hear of it" with the MOU, n=738]



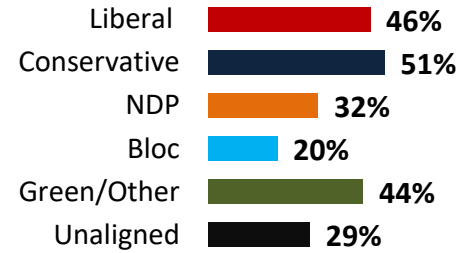
Segmentation

Respondents who say MOU sounds 'Good'

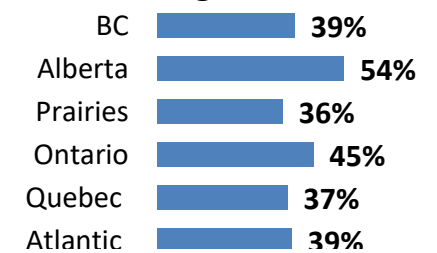
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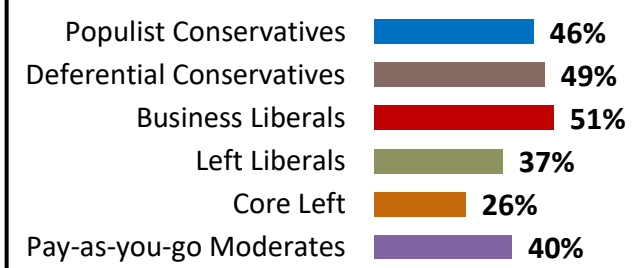
Party ID



Region



Values Clusters



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.

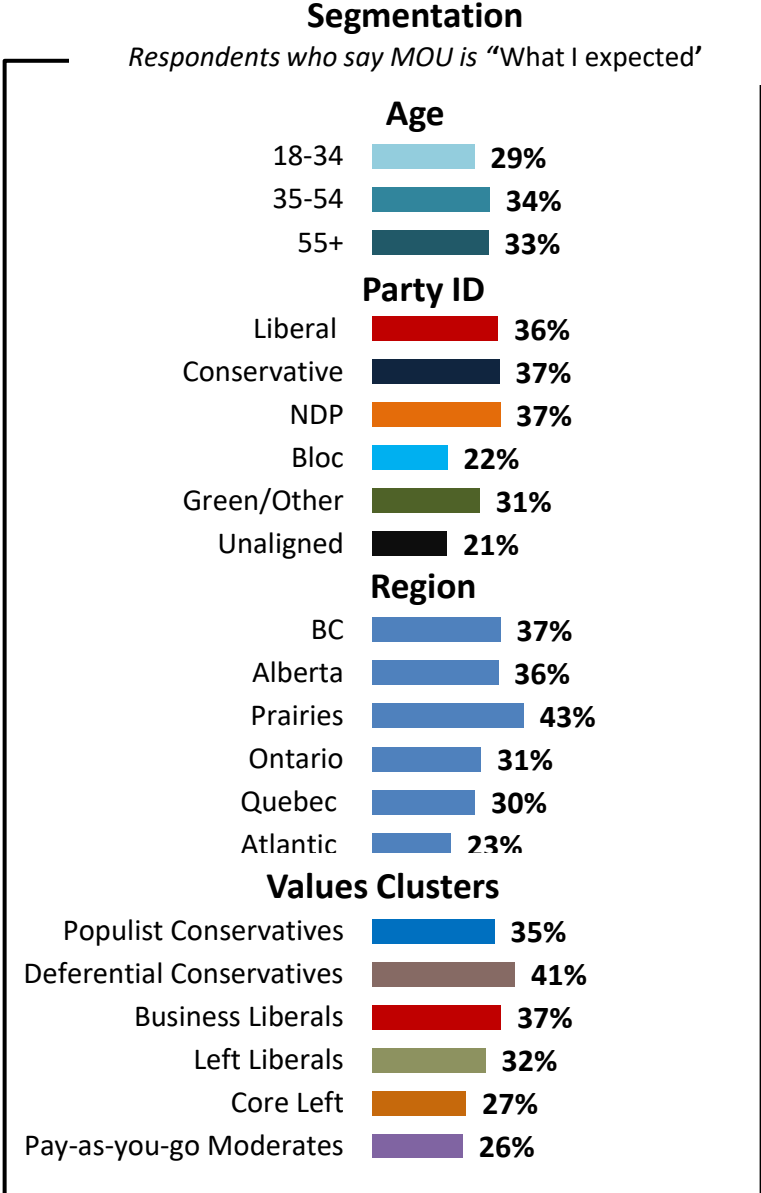
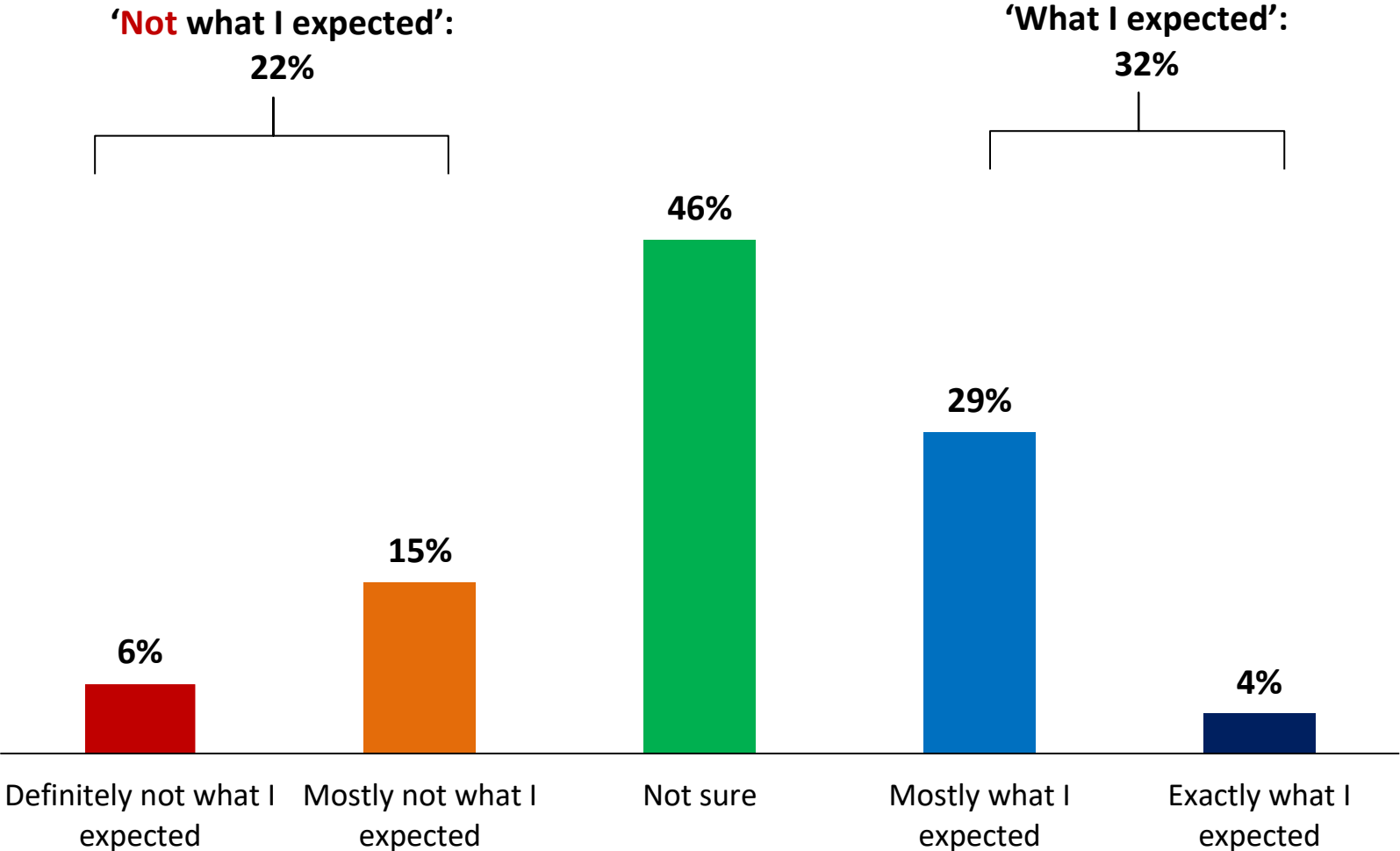
Once some Indigenous consultation and negotiations with B.C. take place, Alberta, as the current proponent of this pipeline, will present its plan to the Major Projects Office (MPO) for expedited review by July 1, 2026.

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]



MOU Impression: 42% say that MOU sounds like a good thing based on their first impression; Net good falls by 7 points when impression is aided

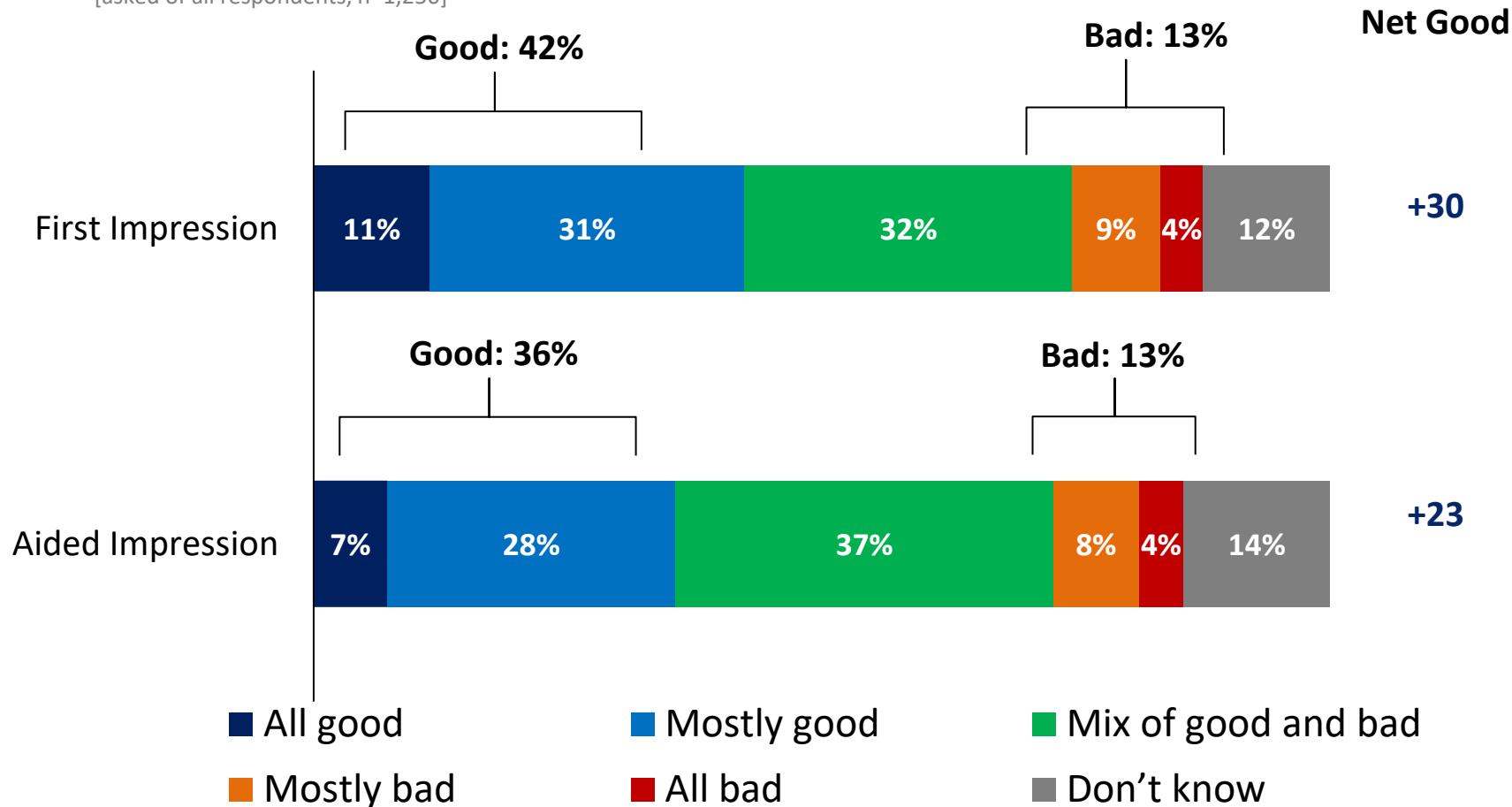


First Impression: From what you know or based on your first impression, does this Memorandum of Understanding sound like a good thing or a bad thing?

[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=1,250]



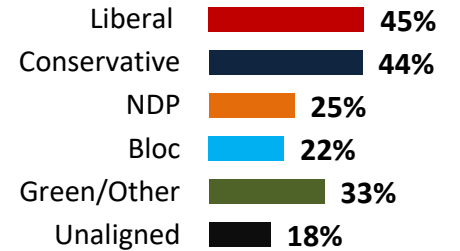
Segmentation

Aided Impression MOU sounds 'Good'

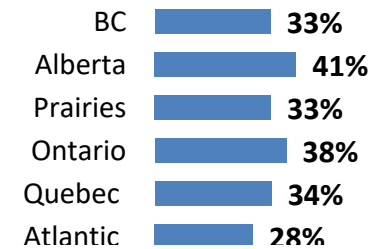
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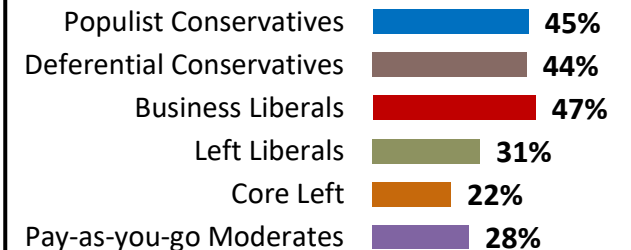
Party ID



Region



Values Clusters



MOU Impression: Those who are not familiar with the plan, once learning more about it are most likely to see it as a mix of good and bad



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]

Aided Impression \ Familiarity	Familiarity				
	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%

MOU Impression: Nearly 2-in-5 who said ‘Don’t know’ for their first impression, say ‘Mix of good and bad’ 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=738]

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=738]

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%

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



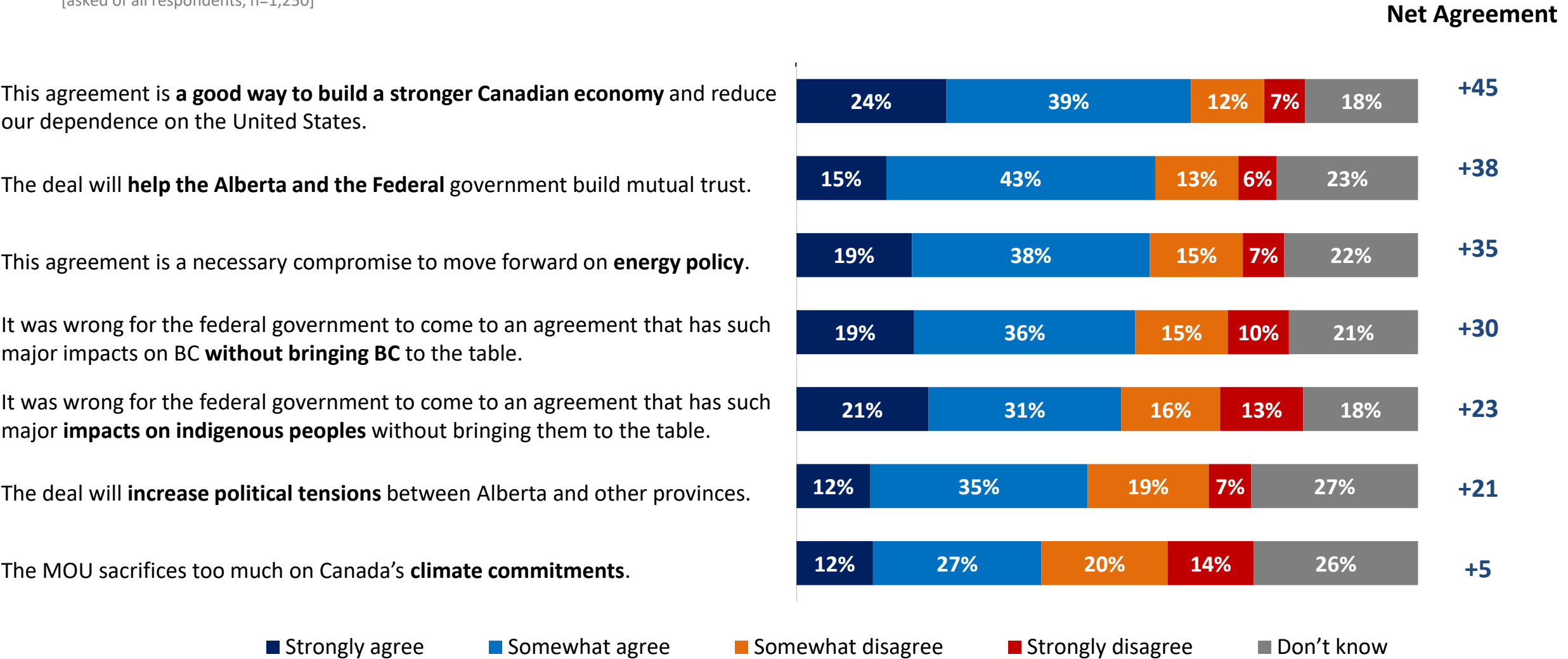
MOU Living to Expectations: Based on what you have just read, is this what you expected to see announced in the agreement?
Aided Impression: And from this description and anything else you may have read, seen or heard, does MOU sound like a good thing or a bad thing?
[asked of all respondents, n=1,250]

Expectations \ Aided Impression	Not what I expected (n=271)	Not sure (n=405)	What I expected (n=575)
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%

MOU – Attitudes

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

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



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.

