



**Canada This Month
MOU**

Public Opinion Research
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Study Overview



Building on findings from previous waves, this report tracks March 2026 data about:

- **Memorandum of understanding**
- **Approval process for natural resource development projects**
- **Alberta grievances**

Key Findings

- 1 The MOU has growing awareness but remains polarizing and Albertans are most invested.** Casual awareness of the MOU rose 7 points (from 32% in '25 to 39% '26), with 66% having at least heard of it, but only 27% are truly familiar. Those who know it best are most likely to view it favourably (57% good), while casual awareness skews toward mixed impressions (42% “mix of good and bad”). AB leads familiarity (34%) and positive reception (43% good vs. 35% in BC).
- 2 Alberta grievances are real but softening; the MOU is doing some work.** Unchanged since Nov. '25, 69% of Albertans still feel the province has been treated unfairly by Ottawa. Overall net grievances improved by 9 points since Nov., driven by a 10-point rise in the share who believe Alberta has always been treated fairly.
- 3 Canadians are warming to the natural resource approval process and want it faster.** Net effectiveness of the approval process improved 4 points to +8, with 42% saying it works well. However, 34% say the federal government is moving too slow on reform, majority among Conservatives (55%). 31% say the pace is right. 62% Liberals are satisfied with direction.

Segmentations

Segmentation Summary

Key Segmentation: We use attitudinal clusters to explore opinions within groups that share common motivations

Political Value Clusters

We group Canadians into six “values” clusters based on 4 key political values:

1. **Populist Conservatives** (12%) - Believe government should listen to common sense, not experts, and trust the profit system.
2. **Deferential Conservatives** (10%) - Support government decisions based on affordability and trust expert guidance over public opinion.
3. **Business Liberals** (23%) - Champion equal opportunity and public need, favoring expertise in policy decisions.
4. **Left Liberals** (17%) - Balance equal opportunity with wealth redistribution while respecting both experts and common sense.
5. **Core Left** (18%) - Believe the profit system brings out the worst in people and government should redistribute wealth
6. **Pay-as-you-go Moderates** (20%) - Want government spending based on affordability but support creating equal opportunity.

Economic Gap Clusters

We group Canadians into four “economic” clusters based on two key attitudes:

1. **Achievers** (22%) - The system is working for them. Believe opportunity exists in their province and feel confident that hard work still pays off.
2. **Strugglers** (31%) - Getting ahead is becoming increasingly hard. Believe opportunity exists in principle, but feel that no matter how hard they work, getting ahead is becoming increasingly out of reach.
3. **Ambivalent** (22%) - Checked out from the system. Neither convinced that opportunity exists nor that hard work is futile.
4. **Alienated** (24%) – Locked out and let down on every front. Reject the idea that opportunity exists and firmly believe that hard work no longer pays off.

Federal Party ID

We group Canadians into six “9” based on their self-identifying with one of the following:

1. **Conservative** (31%)
2. **Liberal** (30%)
3. **NDP** (8%)
4. **Bloc Québécois** (6%)
5. **Green/Other** (5%)
6. **Unaligned** (20%)

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



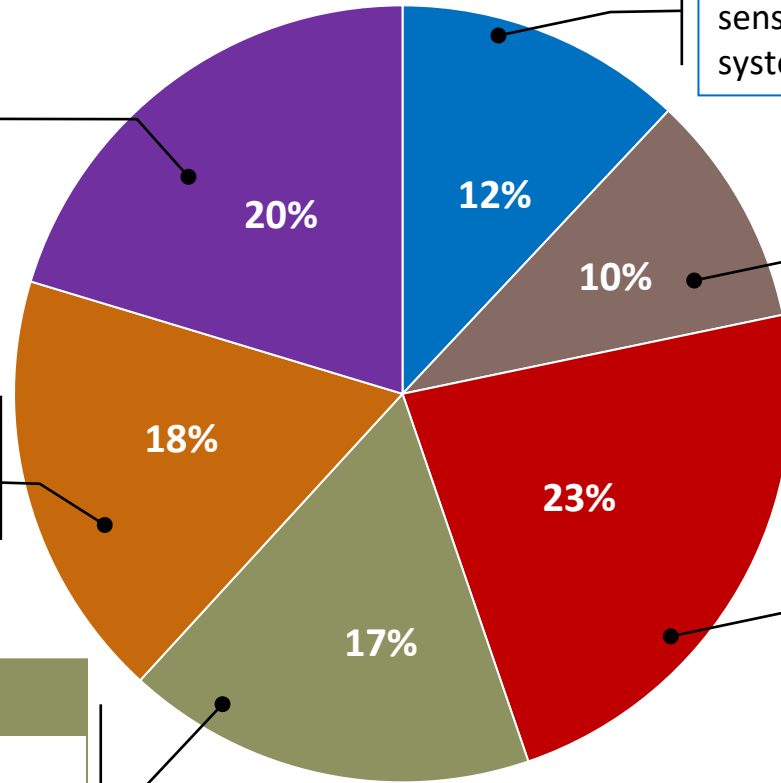
Clusters are based on 4 basic values: equal opportunity versus redistribution; trust in the profit system; whether spending should be based on ability to afford or public need; and whether government should listen to experts or common sense.

[asked of all respondents nationally; n=2000]

Pay-as-you-go Moderates
 Want government spending based on affordability but support creating equal opportunity.

Core Left
 Believe the profit system brings out the worst in people and government should redistribute wealth

Left Liberals
 Balance equal opportunity with wealth redistribution while respecting both experts and common sense.



Populist Conservatives
 Believe government should listen to common sense, not experts, and trust the profit system.

Deferential Conservatives
 Support government decisions based on affordability and trust expert guidance over public opinion.

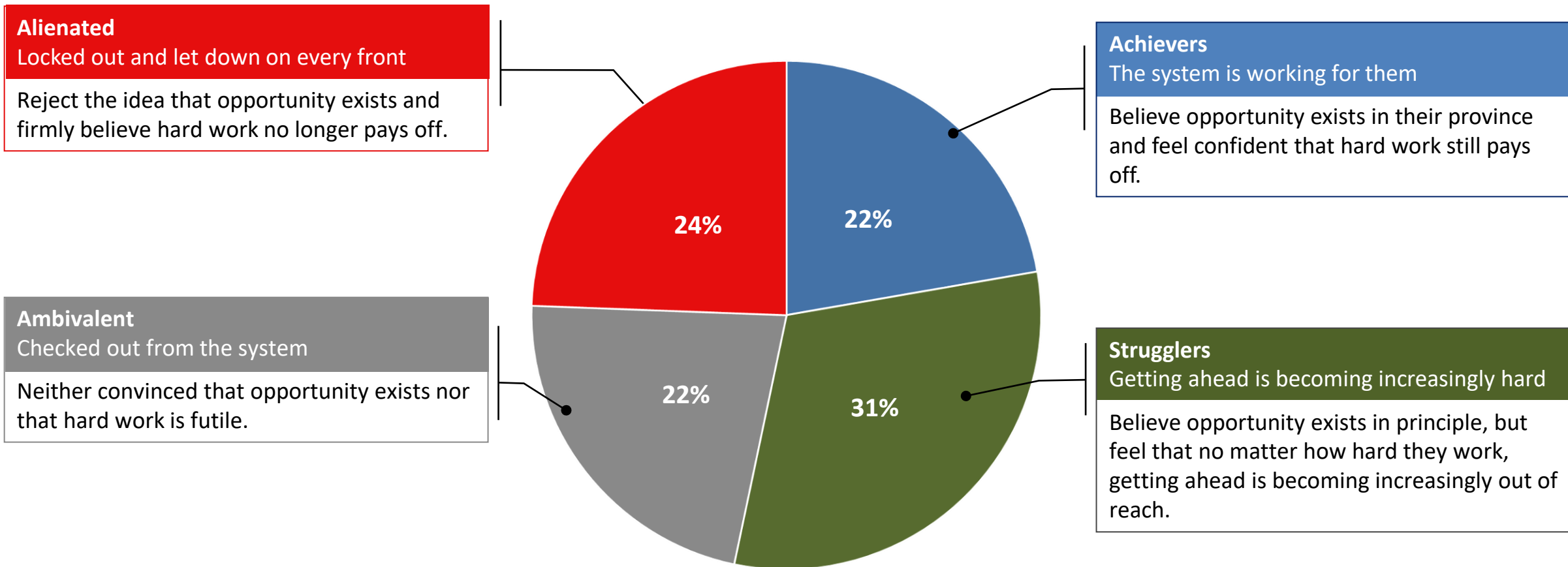
Business Liberals
 Champion equal opportunity and public need, favoring expertise in policy decisions.

Economic Gap Segmentation: Canadians are almost equally split between four economic segments, around 1-in-4 belonging to each



Gap segmentation: Agree with 'Here in [your province] you can be anything you want if you are willing to work for it' BY Agree with 'No matter how hard I work, every year it seems more difficult to get by'.

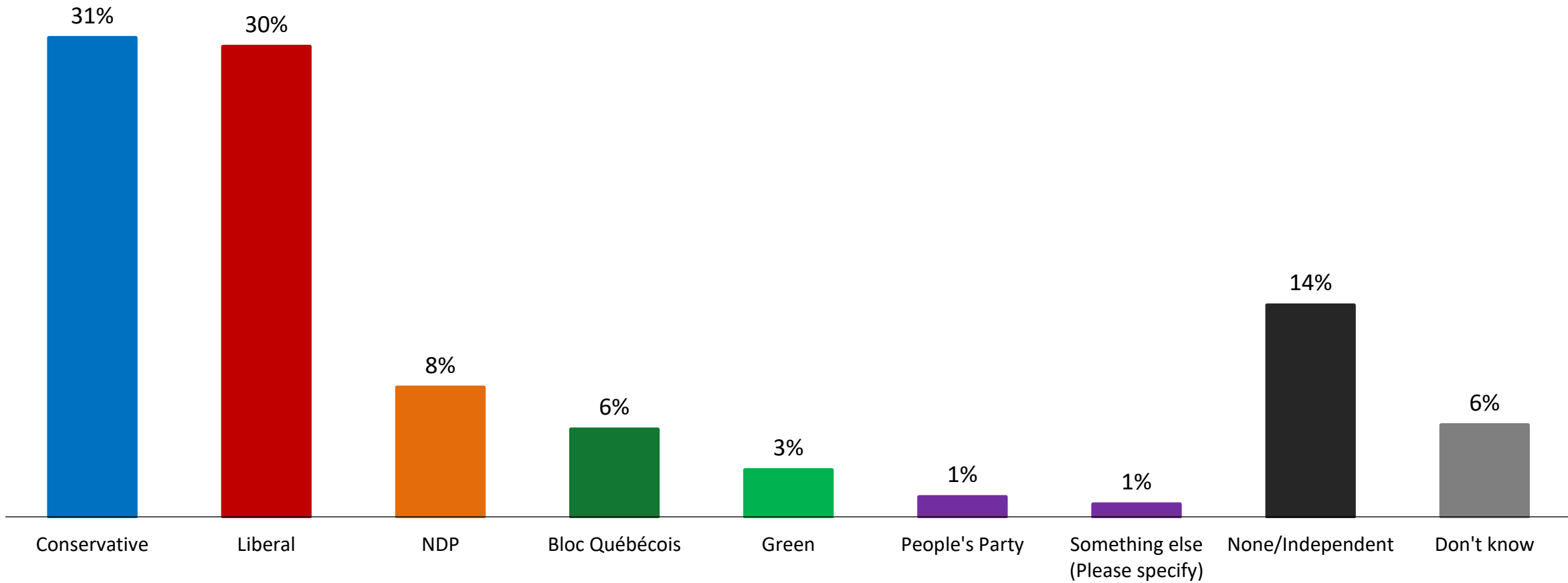
[asked of all respondents nationally; n=1,500]



Federal Party ID: Plurality of Canadians identify as conservatives (31%)¹⁰ or liberals (30%)



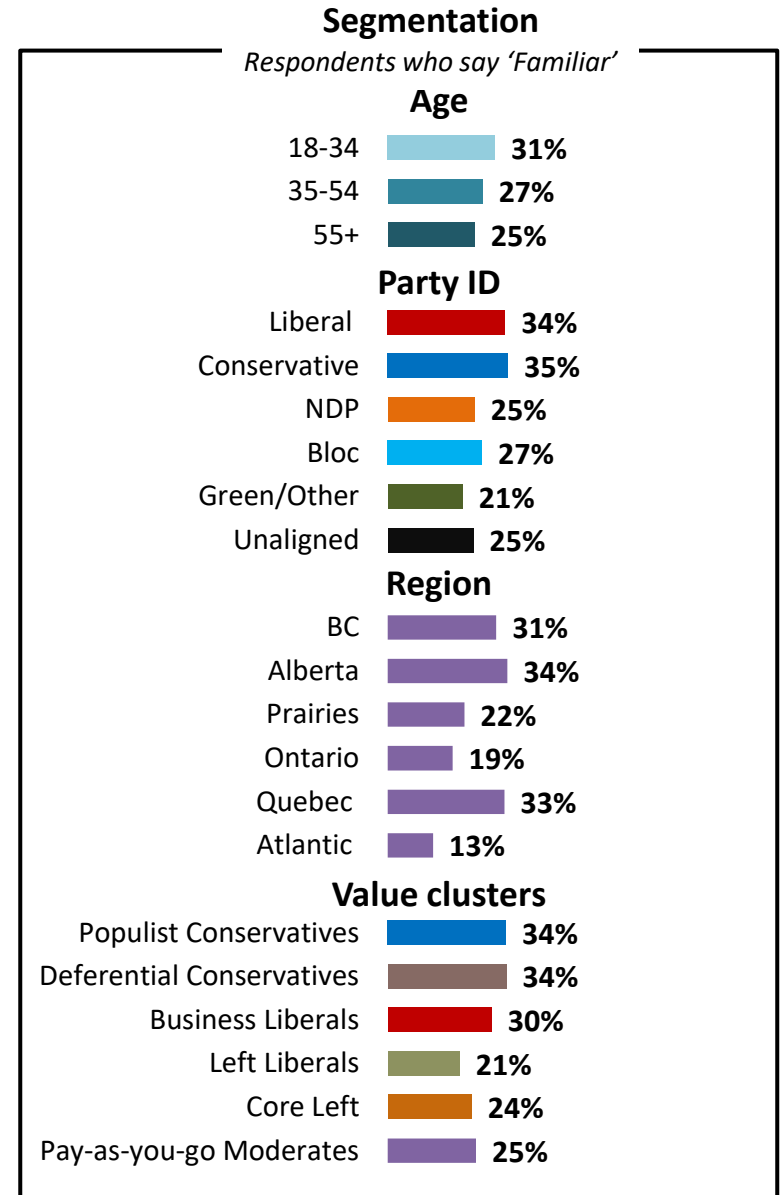
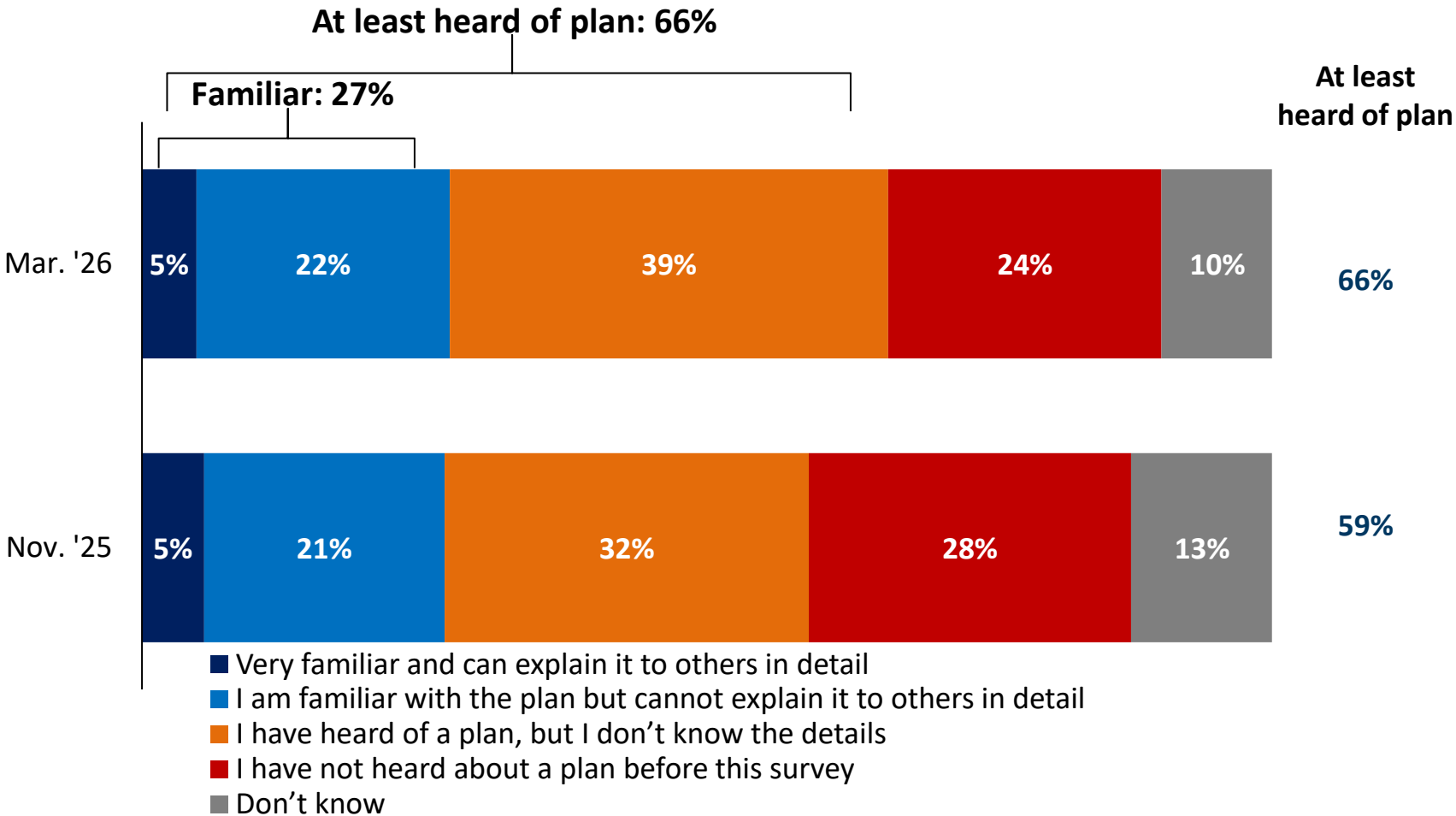
Thinking about politics in Canada, generally speaking, do you usually think of yourself as a...
[asked of all respondents nationally; n=2000]



Memorandum of Understanding

Familiarity: 27% are familiar with the MOU, but 66% have at least heard of plan, a 7% increase in casual awareness since Nov. '25

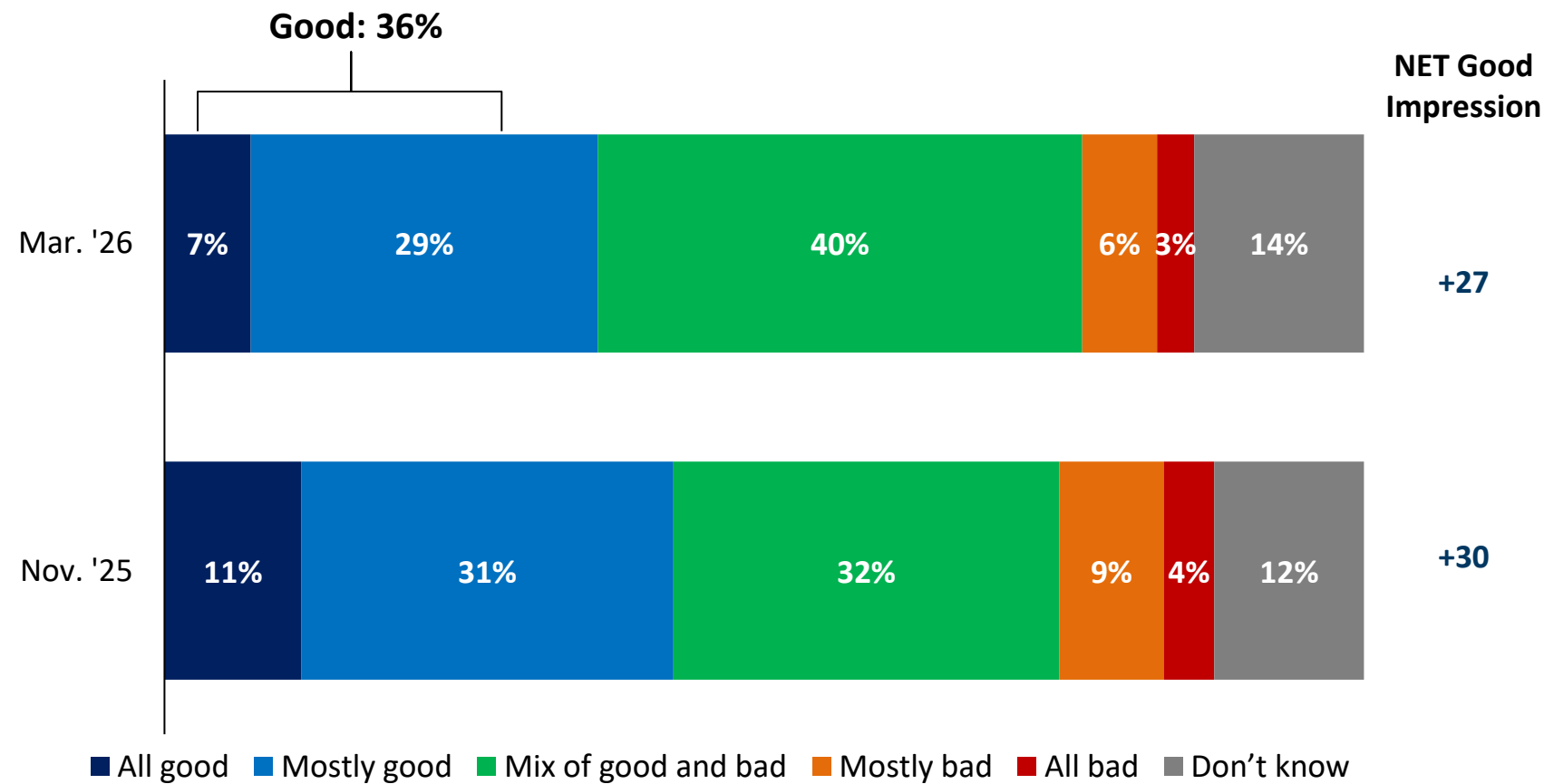
Q How familiar are you with the Memorandum of Understanding between the federal and Alberta governments announced on November 27, 2025 on how to develop Alberta's energy sector and make Canada an energy superpower?
 [asked of all respondents nationally, n=2,000]



Impression: 8% increase in those with mixed feelings about MOU; 36% have "good" impression; 43% AB's vs 35% BC's with good impression

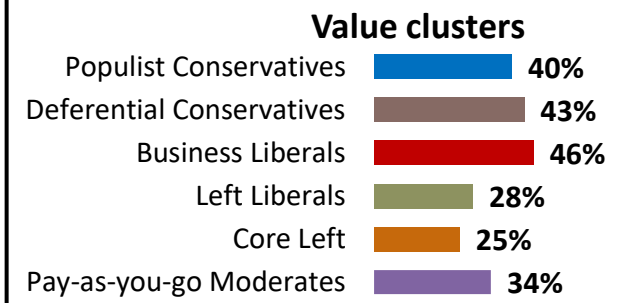
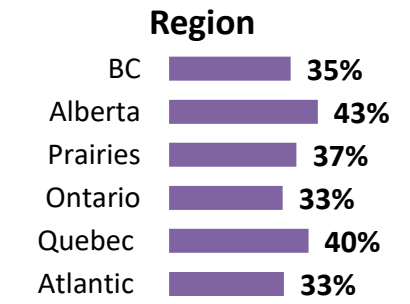
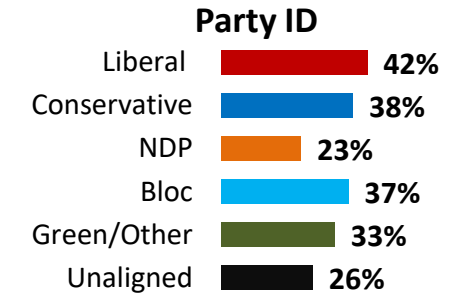
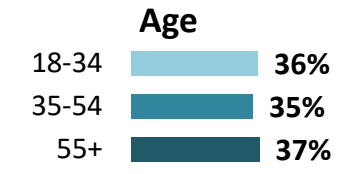
Q Asked in Mar. '26: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing? [asked of those that "have heard of" MOU, n=1,319]

Asked in Nov. '25: 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 nationally, n=738]



Segmentation

Respondents who say MOU sounds 'Good'



MOU Familiarity: Those who have only heard about the plan, are most likely to see it as “a mix of good and bad” (42%) and “mostly good” (25%)



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?

Impression: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that “have heard of” MOU nationally, n=1,319]

Familiarity

		Total (n=1319)	Very familiar and can explain it to others in detail (n=96)	I am familiar with the plan but cannot explain it to others in detail (n=448)	I have heard of a plan, but I don’t know the details (n=775)
Impression	All good	7%	24%	10%	4%
	Mostly good	29%	33%	35%	25%
	Mix of good and bad	40%	21%	41%	42%
	Mostly bad	6%	8%	6%	6%
	All bad	3%	11%	4%	2%
	Don’t know	14%	2%	4%	21%
	GOOD	36%	57%	45%	29%
BAD	9%	20%	10%	8%	

Impression BY Combined Vote (BC): Plurality (44%) of BC Con's see it as mostly good, while 49% of NDP and everyone else as a mix of good/bad



Impression: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that "have heard of" MOU in BC, n=432]

BC Combined Vote

		Total (n=432)	BC Conservative (n=191)	NDP (n=161)	Everyone else (n=81)
Impression	All good	7%	11%	1%	7%
	Mostly good	28%	33%	28%	19%
	Mix of good and bad	44%	37%	49%	49%
	Mostly bad	7%	5%	7%	12%
	All bad	4%	3%	6%	3%
	Don't know	10%	11%	9%	10%
	GOOD	35%	44%	29%	26%
	BAD	11%	8%	13%	15%

Impression BY Combined Vote (Alberta): NDP (43%) voters are nearly as positive about MOU as UCP (48%) voters



Impression: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that "have heard of" MOU in AB, n=326]

Combined Alberta Vote

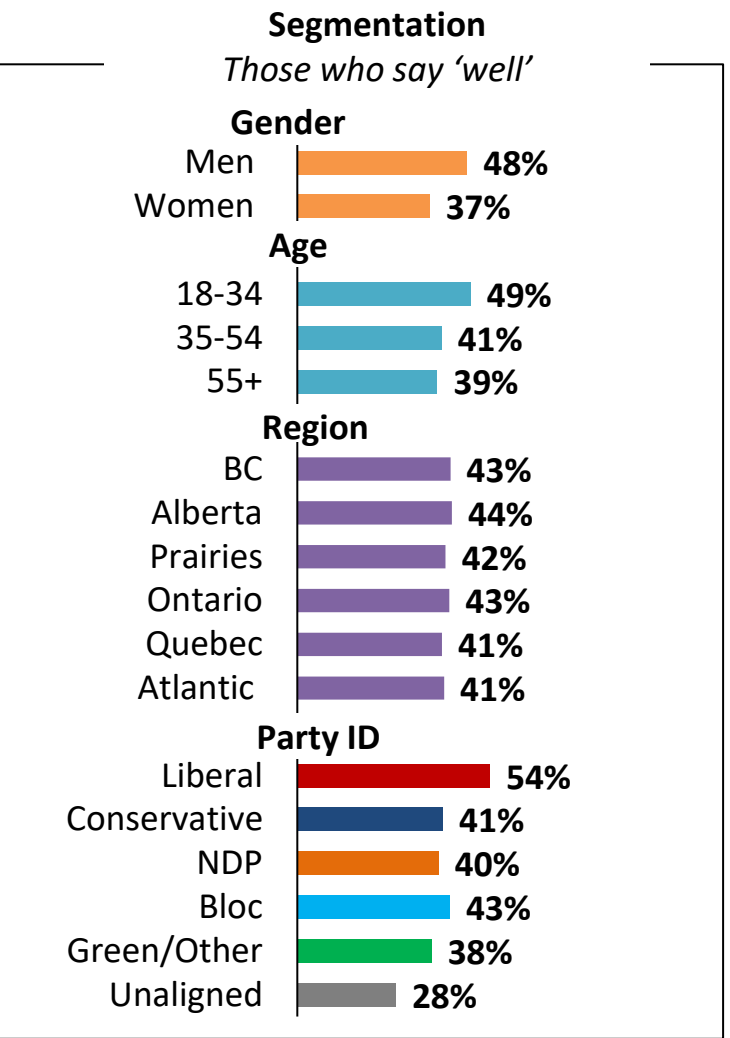
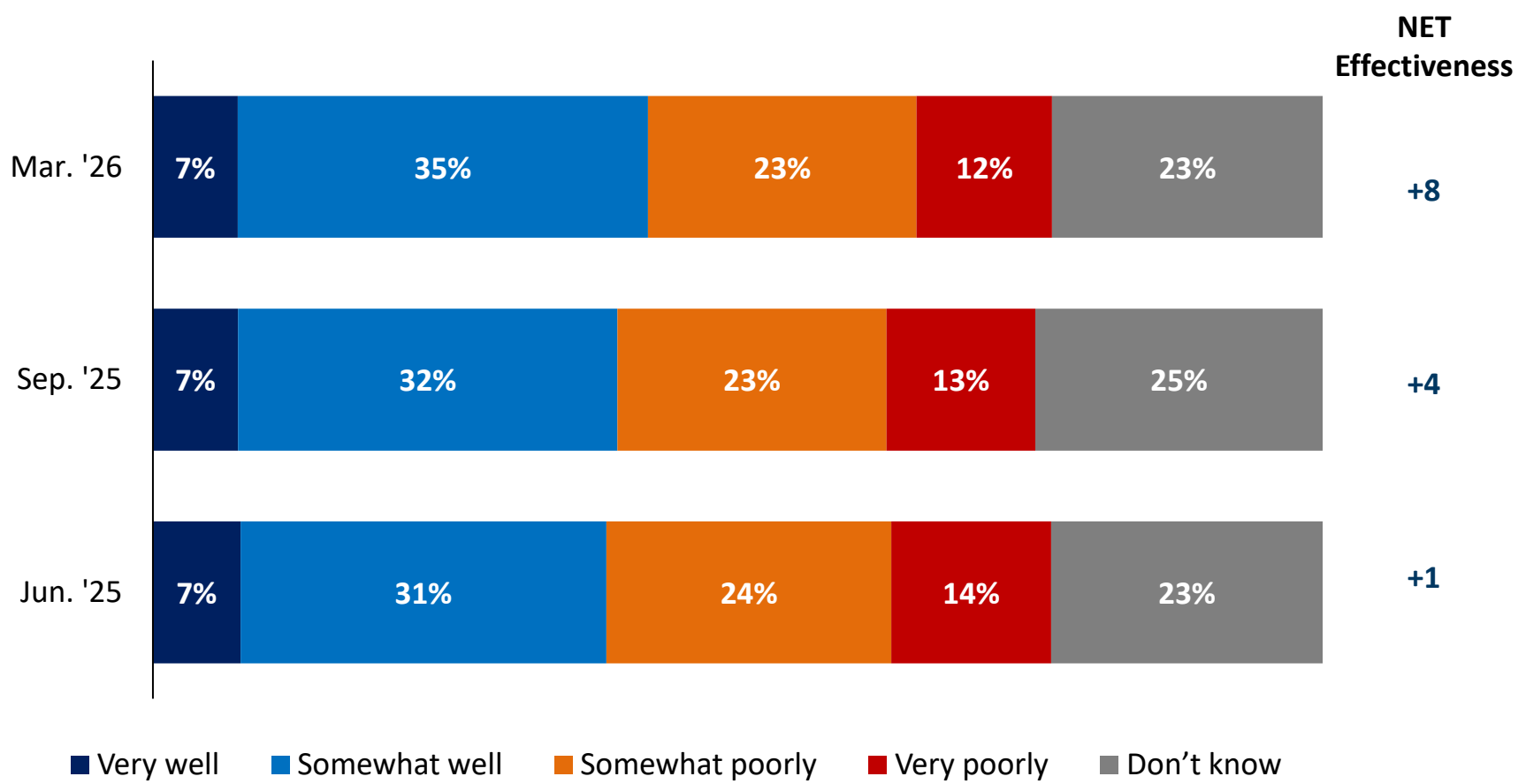
		Total (n=326)	United Conservative Party (n=155)	NDP (n=90)	Everyone else (n=81)
Impression	All good	7%	11%	5%	3%
	Mostly good	36%	37%	38%	30%
	Mix of good and bad	37%	34%	35%	43%
	Mostly bad	5%	6%	2%	6%
	All bad	4%	4%	2%	5%
	Don't know	12%	8%	18%	14%
	GOOD	43%	48%	43%	32%
	BAD	9%	10%	4%	10%

Approval Process

For natural resource development projects

Effectiveness of Approval Process: 42% believe the approval process works well, 35% it works poorly; 4-point increase in net effectiveness

Q Thinking about the current approval process for natural resource development projects like pipelines, mines, or forestry, how well do you think the current system works?
 [asked of all respondents nationally, n=2,000]

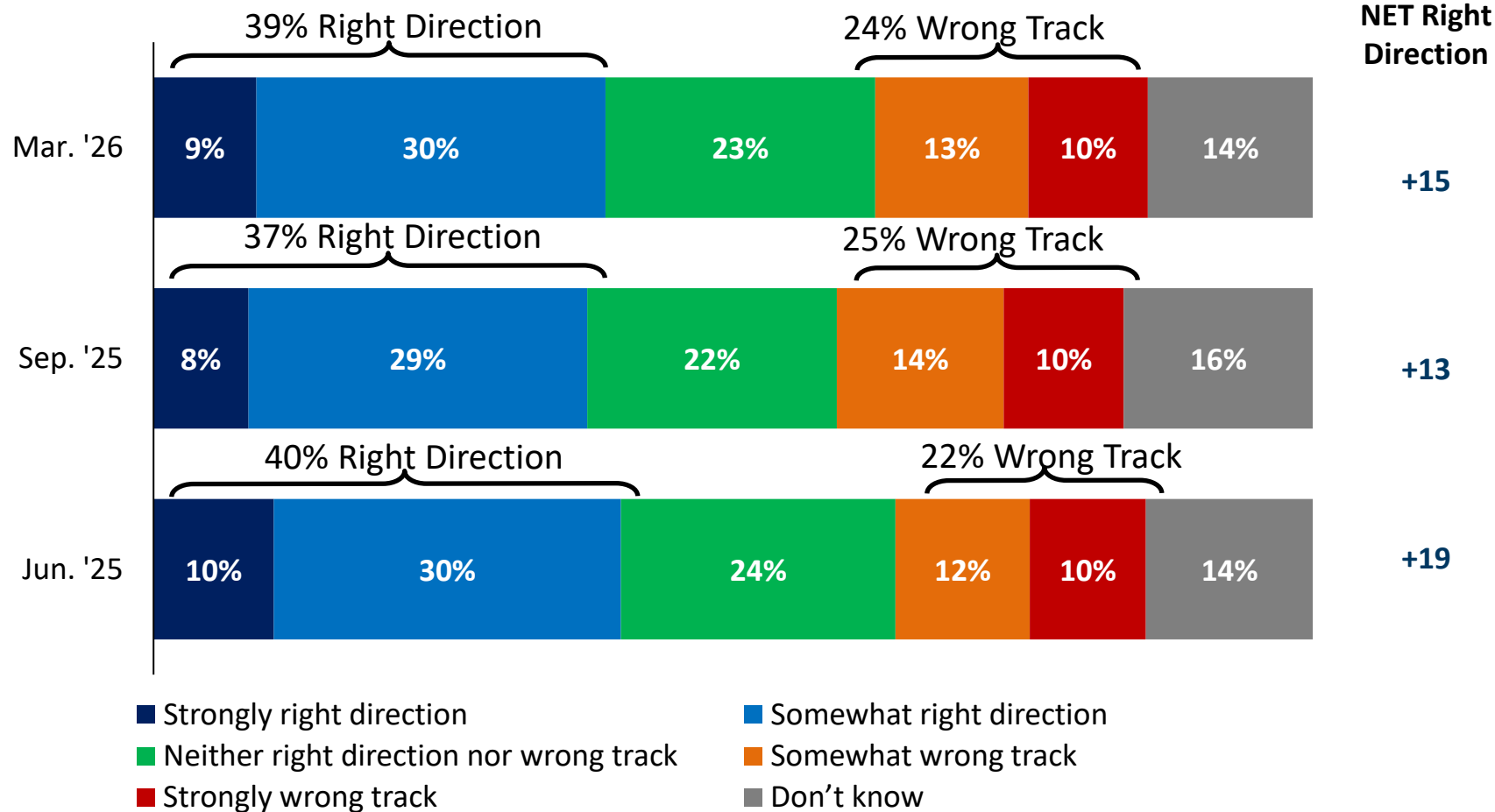


Direction of Approval Process: Almost 2-in-5 believe gov't is headed in the right direction; 27+ point gap between Liberals and others



Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?

[asked of all respondents nationally, n=2,000]



Segmentation

Those who say 'right direction'

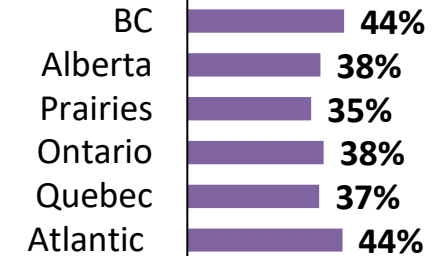
Gender



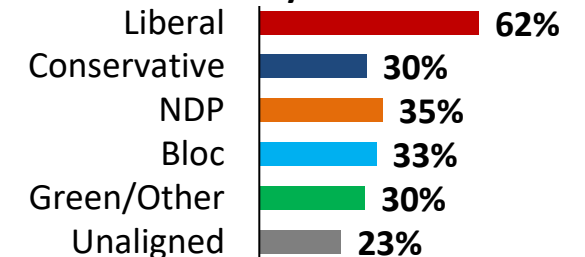
Age



Region



Party ID



Approval Process by Economic Gap: Majority of Achievers asses process²⁰ as going in the right direction, Alienated most likely to say wrong track

		Economic Gap				
		Total	Achievers	Strugglers	Ambivalent	Alienated
% Col		(n=2000)	(n=445)	(n=621)	(n=446)	(n=488)
Approval Process	Strongly right direction	9%	15%	9%	6%	5%
	Somewhat right direction	30%	39%	33%	25%	23%
	Neither right direction nor wrong track	23%	19%	24%	31%	20%
	Somewhat wrong track	13%	9%	13%	11%	19%
	Strongly wrong track	10%	6%	11%	5%	19%
	Don't know	14%	12%	10%	22%	15%

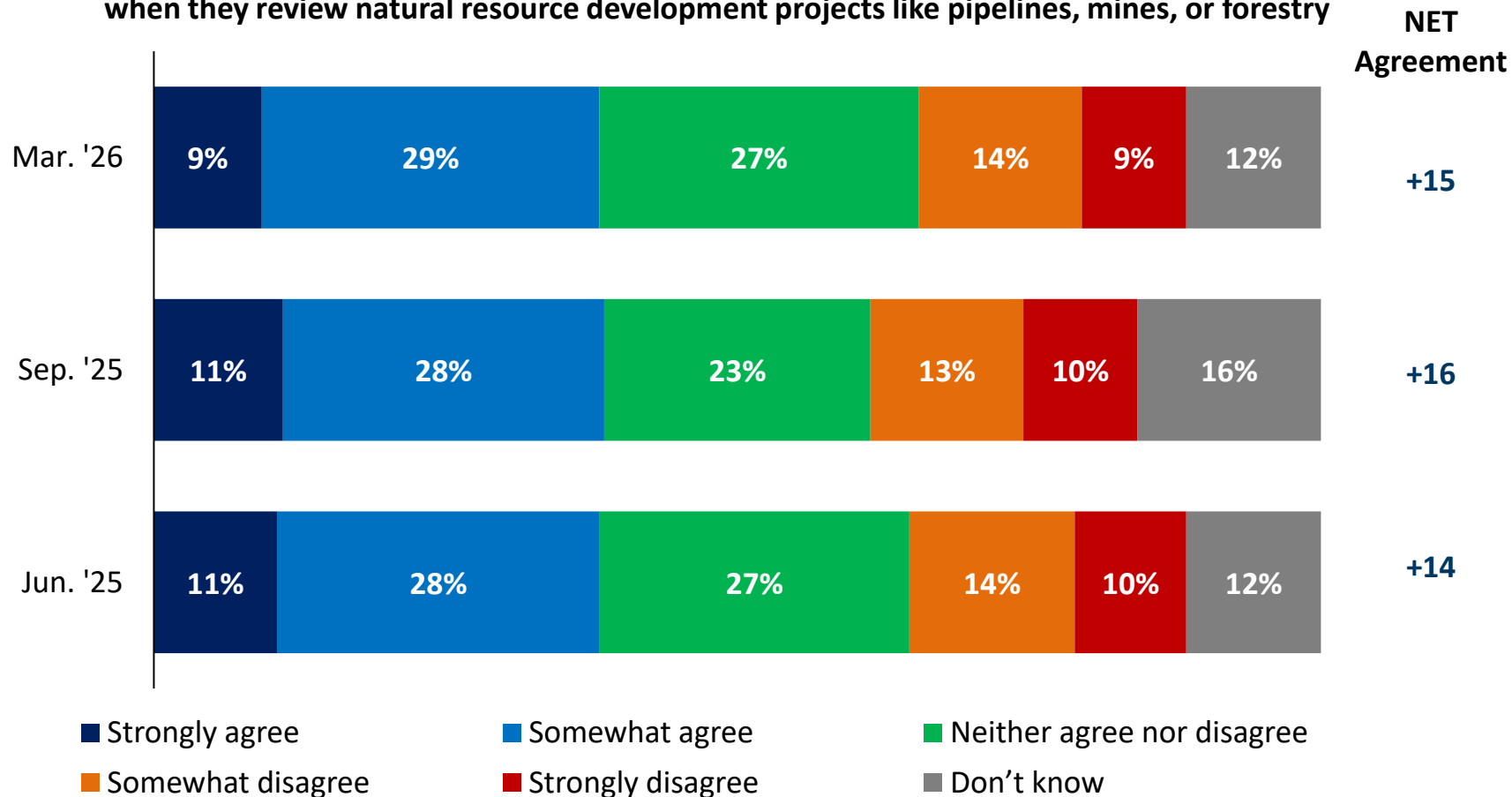
Note: Changes to how project approval works in Canada were introduced to support economic growth and job creation, offering indirect relief to Canadian struggling with rising costs. The data shows that one third of Strugglers see the process as somewhat going in the right direction. 38% of Alienated see it as on the wrong track.

Protecting Public Interest: 38% agree that gov't, and regulators protect public interest; no large regional differences ²¹

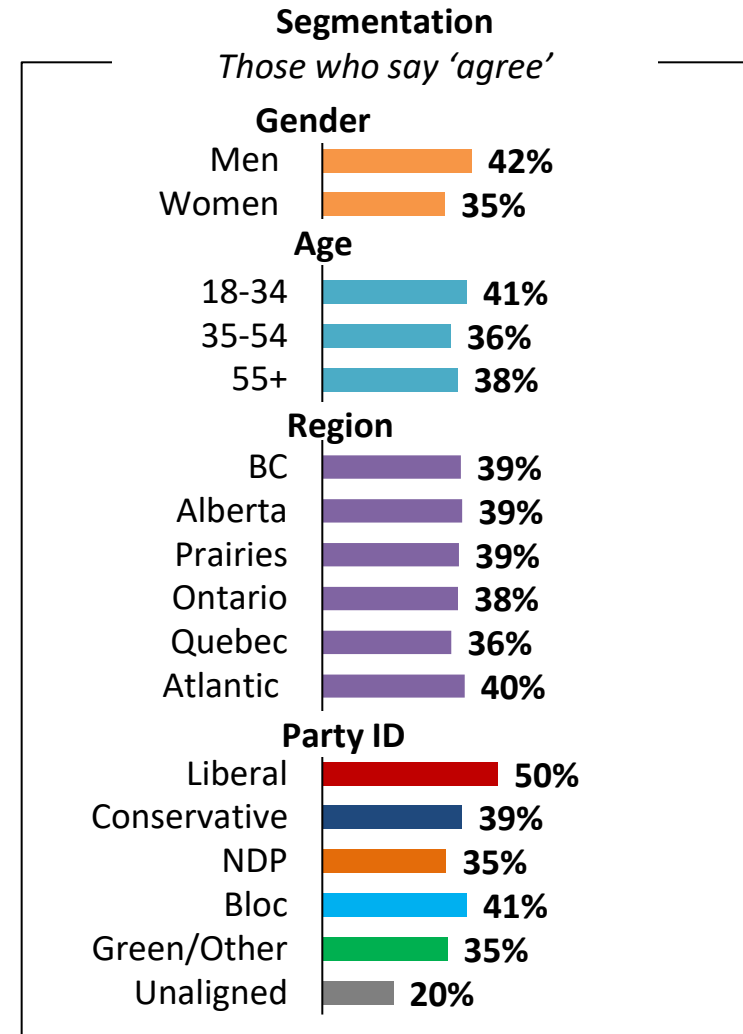


Thinking of the current approval process for natural resource development projects like pipelines, mines, or forestry, do you agree or disagree with the following statements:
[asked of all respondents nationally, n=2,000]

Government and regulators in this province do a *good job of protecting the public interest* when they review natural resource development projects like pipelines, mines, or forestry



Current data: March 2026



Approval Process by Protecting Public Interest: Among those disagreeing w/ fed's protecting public interests, 44% think process is on a wrong track



Protecting public interest: Government and regulators in this province do a good job of protecting the public interest when they review natural resource development projects like pipelines, mines, or forestry

Approval process: Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track? [asked of all respondents nationally, n=2,000]

Protecting Public Interest

		Total	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
		(n=2000)	(n=185)	(n=579)	(n=547)	(n=279)	(n=179)	(n=231)
Approval Process	Strongly right direction	9%	32%	10%	4%	6%	7%	4%
	Somewhat right direction	30%	25%	47%	27%	26%	12%	15%
	Neither right direction nor wrong track	23%	15%	22%	38%	20%	12%	11%
	Somewhat wrong track	13%	12%	11%	13%	25%	14%	6%
	Strongly wrong track	10%	12%	4%	7%	11%	44%	6%
	Don't know	14%	4%	6%	12%	11%	10%	58%
	Right direction	39%	58%	58%	31%	32%	19%	19%

Projects Getting Built: 44% agree that projects that are important for the economy are getting built; 4-point increase since Sep. '25.

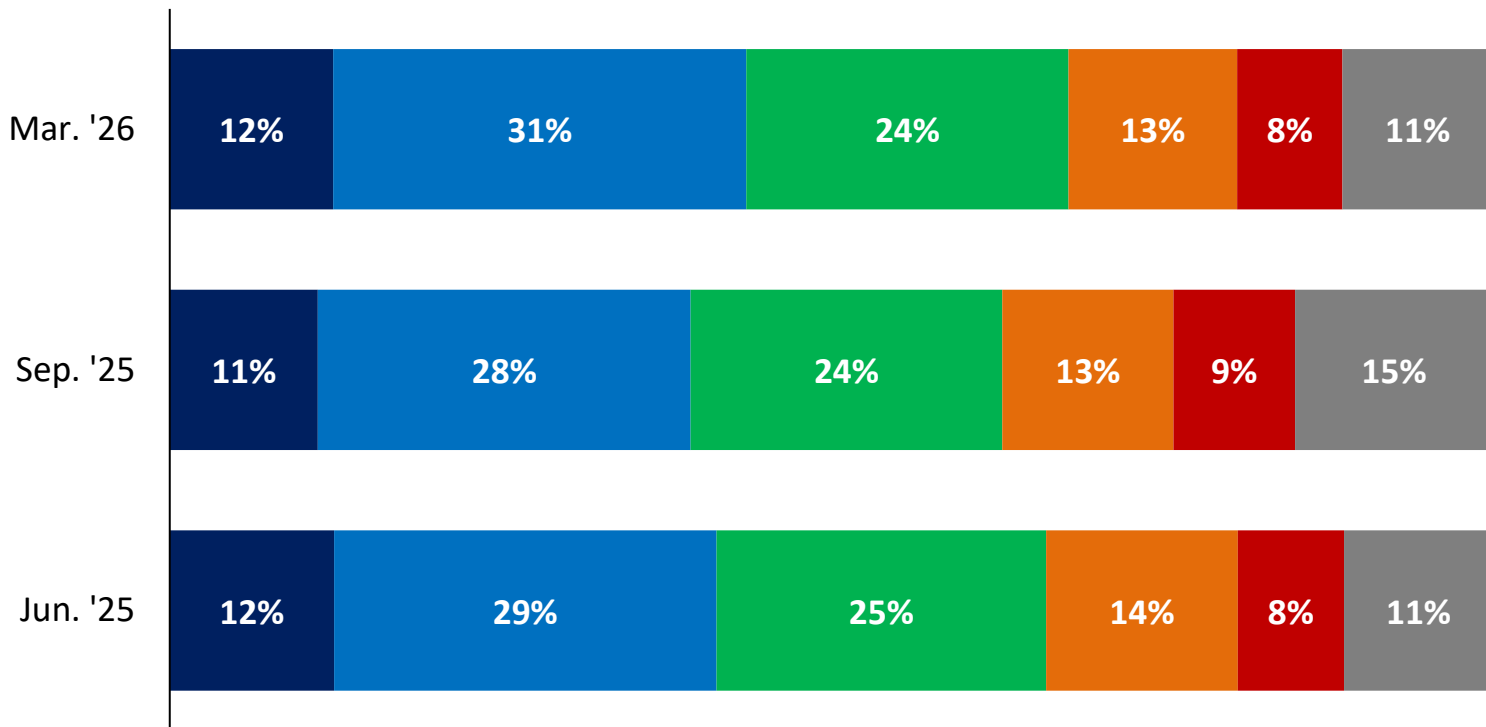


Thinking of the current approval process for natural resource development projects like pipelines, mines, or forestry, do you agree or disagree with the following statements:

[asked of all respondents nationally, n=2,000]

Projects that are important for the economy are getting built

NET Agreement



■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

Segmentation

Those who say 'agree'

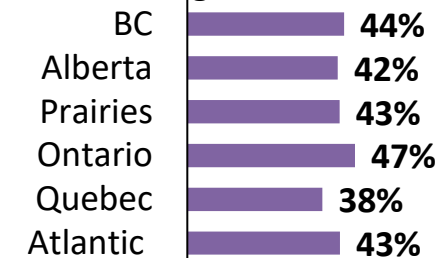
Gender



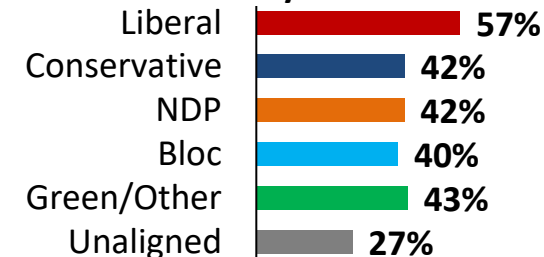
Age



Region



Party ID



Approval Process by Projects Getting Built: Among those thinking that projects are not getting built, 52% say approval process is on wrong track

Projects Getting Built: Projects that are important for the economy are getting built

Approval process: Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track? [asked of all respondents nationally, n=2,000]

Projects that are important for the economy are getting built

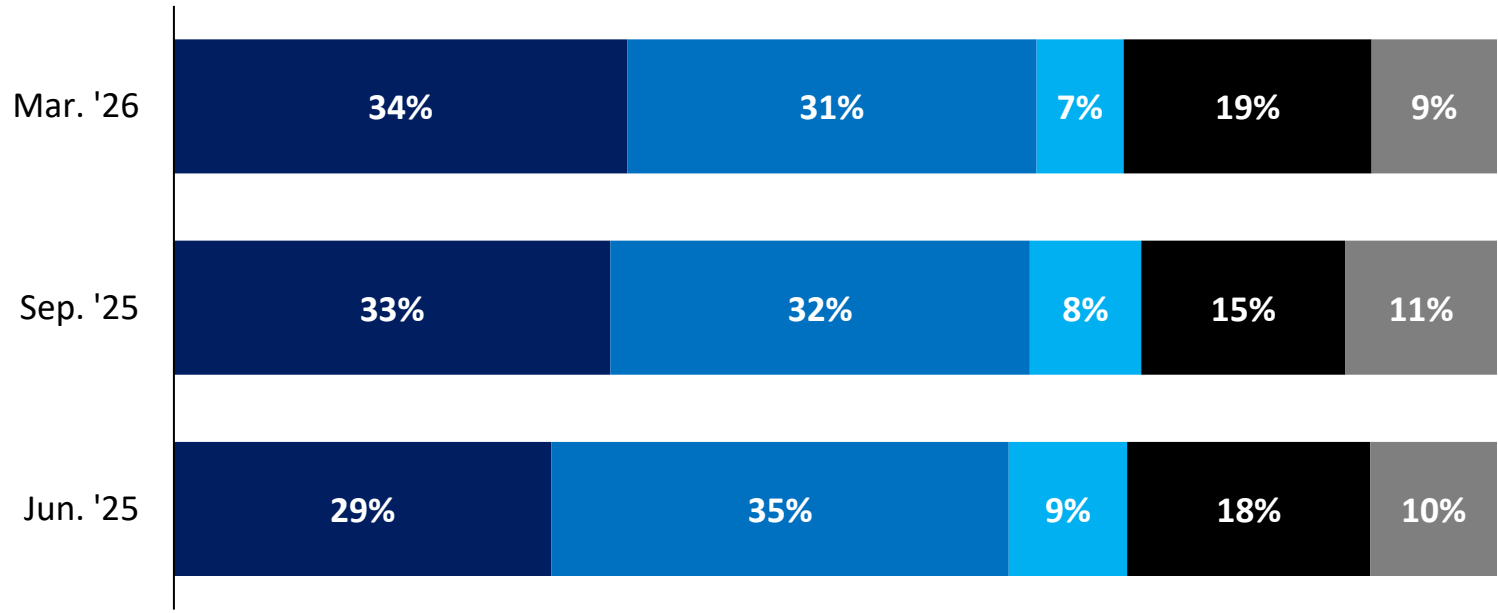
		Total	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
		(n=2000)	(n=247)	(n=625)	(n=487)	(n=255)	(n=159)	(n=227)
Approval process	Strongly right direction	9%	30%	9%	5%	5%	4%	3%
	Somewhat right direction	30%	29%	44%	27%	28%	10%	14%
	Neither right direction nor wrong track	23%	15%	25%	38%	18%	12%	11%
	Somewhat wrong track	13%	9%	12%	13%	25%	16%	6%
	Strongly wrong track	10%	12%	3%	6%	13%	52%	7%
	Don't know	14%	5%	7%	12%	10%	6%	58%
	Right direction	39%	59%	53%	32%	33%	15%	18%

Pace of Change – Fed: 31% say pace of change of gov't approval process is right, and 34% that it is too slow; majority of Con's see it as too slow



When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

[asked of all respondents nationally, n=2,000]



- The Federal government is moving too slow
- The Federal government is moving at about the right pace
- The Federal government is moving too fast
- I'm not sure
- Don't know

Segmentation

Those who say 'too slow'

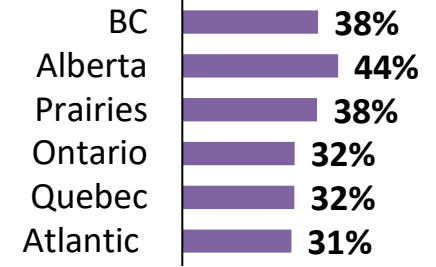
Gender



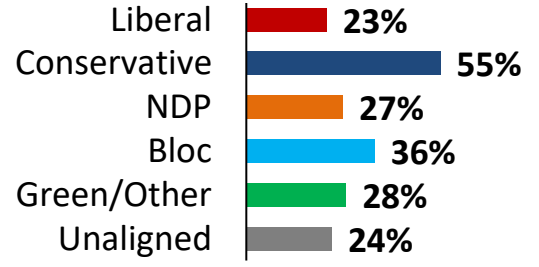
Age



Region



Party ID



Direction of Approval Process by Pace of Change: Plurality of who think²⁶ gov't is moving too slow say that federal gov't is on a wrong track (39%)



Pace of Change: When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

Direction of Approval: Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?

Pace of Change

Direction of Approval

	Total	The Federal government is moving too slow	The Federal government is moving at about the right pace	The Federal government is moving too fast	I'm not sure	Don't know
	(n=2000)	(n=685)	(n=618)	(n=132)	(n=375)	(n=189)
Strongly right direction	9%	5%	19%	6%	3%	2%
Somewhat right direction	30%	27%	51%	20%	17%	5%
Neither right direction nor wrong track	23%	23%	19%	24%	33%	18%
Somewhat wrong track	13%	20%	6%	25%	13%	5%
Strongly wrong track	10%	19%	2%	19%	7%	7%
Don't know	14%	5%	3%	7%	28%	64%
Right direction	39%	33%	70%	26%	20%	7%
Wrong track	24%	39%	7%	44%	20%	11%

Current data: March 2026

[Both questions asked of all respondents nationally, n=2,000]

Impression of MOU by Pace of Change : Plurality of those who think gov't is moving too slow (38%) have good impression of MOU



Pace of Change: When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

Impression of MOU: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

Pace of Change

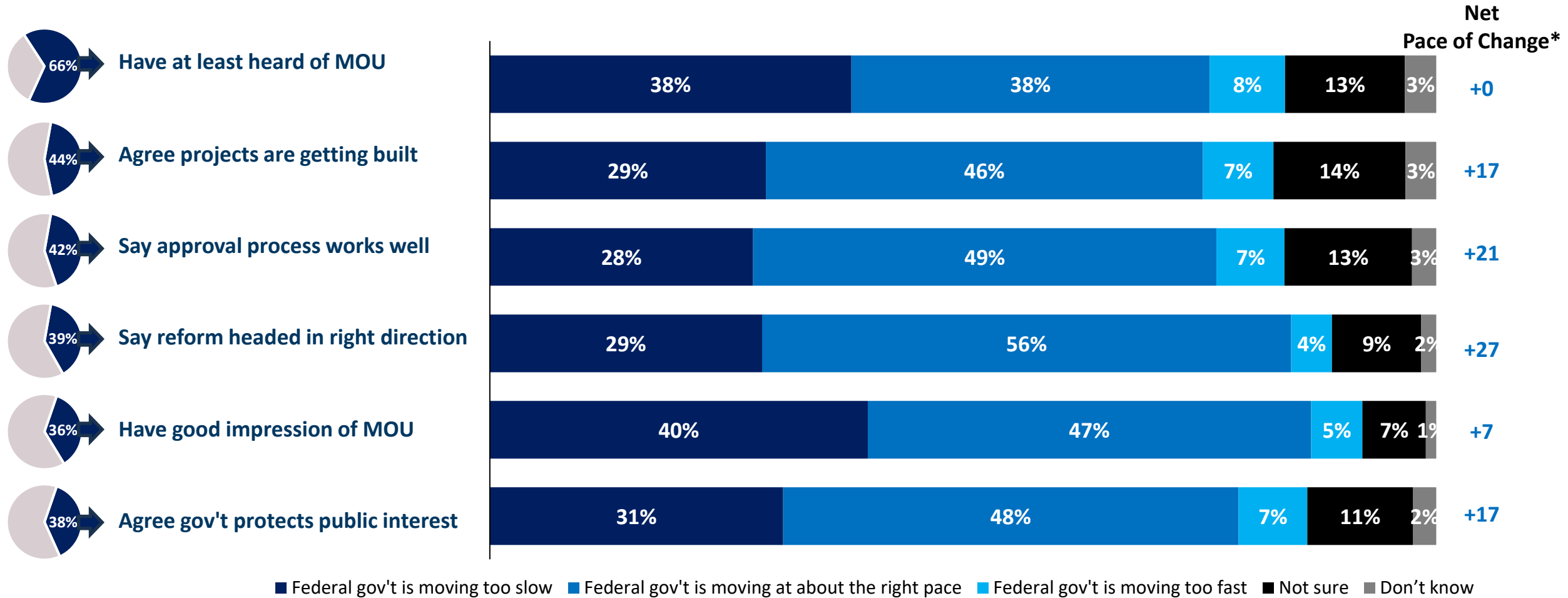
Impression of MOU

	Total	The Federal government is moving too slow	The Federal government is moving at about the right pace	The Federal government is moving too fast	I'm not sure	Don't know*
	(n=1319)	(n=504)	(n=500)	(n=105)	(n=167)	(n=44)
All good	7%	8%	9%	7%	3%	1%
Mostly good	29%	30%	36%	18%	17%	11%
Mix of good and bad	40%	39%	40%	43%	47%	27%
Mostly bad	6%	6%	4%	15%	5%	10%
All bad	3%	4%	1%	10%	2%	4%
Don't know	14%	13%	10%	8%	26%	46%
Good	36%	38%	45%	25%	19%	12%
Bad	9%	10%	5%	25%	7%	15%

Current data: March 2026

[Pace of Change question was asked of all respondents nationally, n=2,000 | Impression of MOU was asked of those who "have heard of" MOU, n=1,319 | *Results should be interpreted with caution due to the small sample size]

Pace of Change Within Canadians Agreeing on Key Fast Tracking Policy Indicators: Even among supporters, a substantial number of Canadians say that gov't is moving too slowly



Have at least heard of MOU: How familiar are you with the Memorandum of Understanding between the federal and Alberta governments announced on November 27, 2025 on how to develop Alberta's energy sector and make Canada an energy superpower?

Agree projects are getting built: Projects that are important for the economy are getting built.

Say approval process works well: Thinking about the current approval process for natural resource development projects like pipelines, mines, or forestry, how well do you think the current system works?

Say reform headed in right direction: Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?

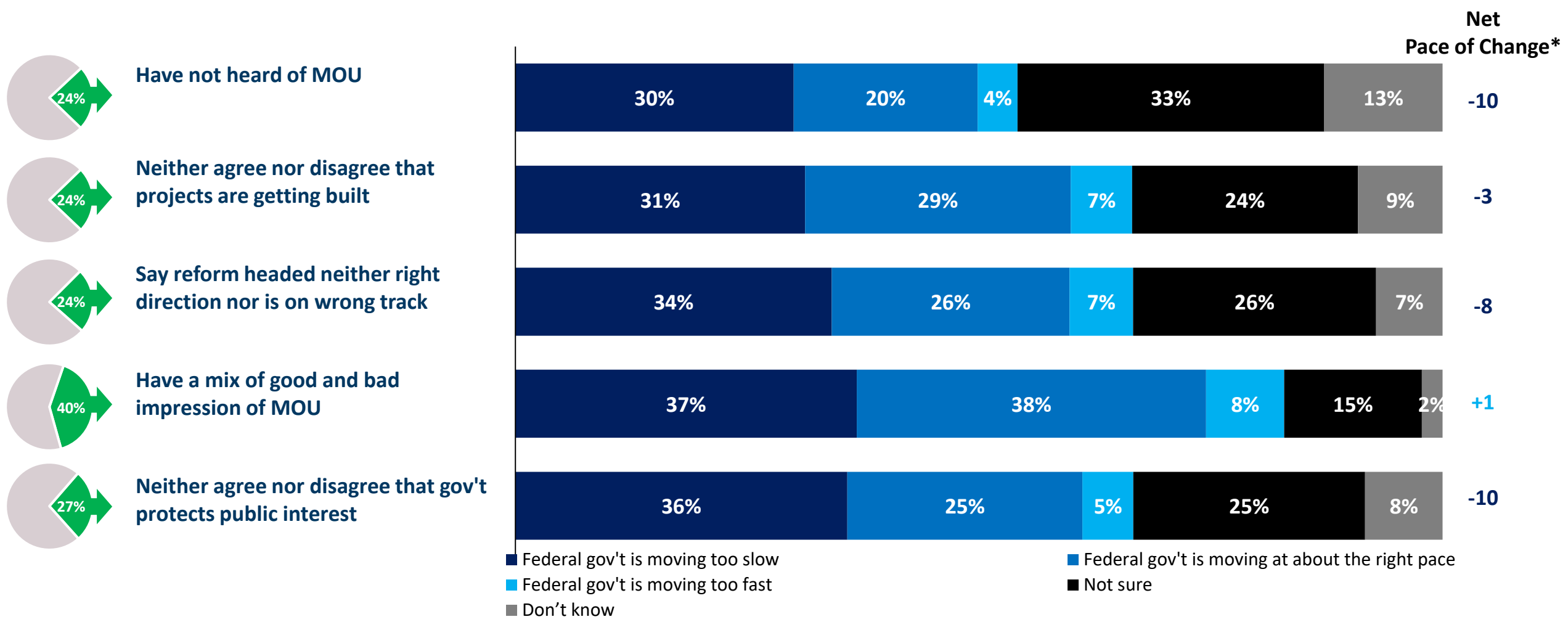
Have good impression of MOU: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

Agree gov't protects public interest: Government and regulators in this province do a good job of protecting the public interest when they review natural resource development projects like pipelines, mines, or forestry

Say gov't moving too slow on reform: When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

Current Data: March 2026 | *Difference between moving at about the right pace and moving too slowly

Pace of Change Within Persuadable Groups of Canadians on Key Fast Tracking Policy Indicators: Those that are uncertain lean toward 'too slow,' although many are unsure



Have not heard of MOU: How familiar are you with the Memorandum of Understanding between the federal and Alberta governments announced on November 27, 2025 on how to develop Alberta's energy sector and make Canada an energy superpower?
Neither agree nor disagree that projects are getting built: Projects that are important for the economy are getting built.
Say reform neither right direction nor is on the wrong track: Thinking about the Federal government's efforts to change how project approval works in Canada, would you say the Federal government is moving in the right direction or the wrong track?
Have a mix of good and bad impressions of MOU: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?
Agree gov't protects public interest: Government and regulators in this province do a good job of protecting the public interest when they review natural resource development projects like pipelines, mines, or forestry
Say gov't moving too slow on reform: When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?
Current Data: March 2026 | *Difference between moving at about the right pace and moving too slowly

Alberta's Grievances

AB's Grievances: 69% of ABs feel their province has been treated unfairly; share of those who see treatment of AB as fair has increased 10 points

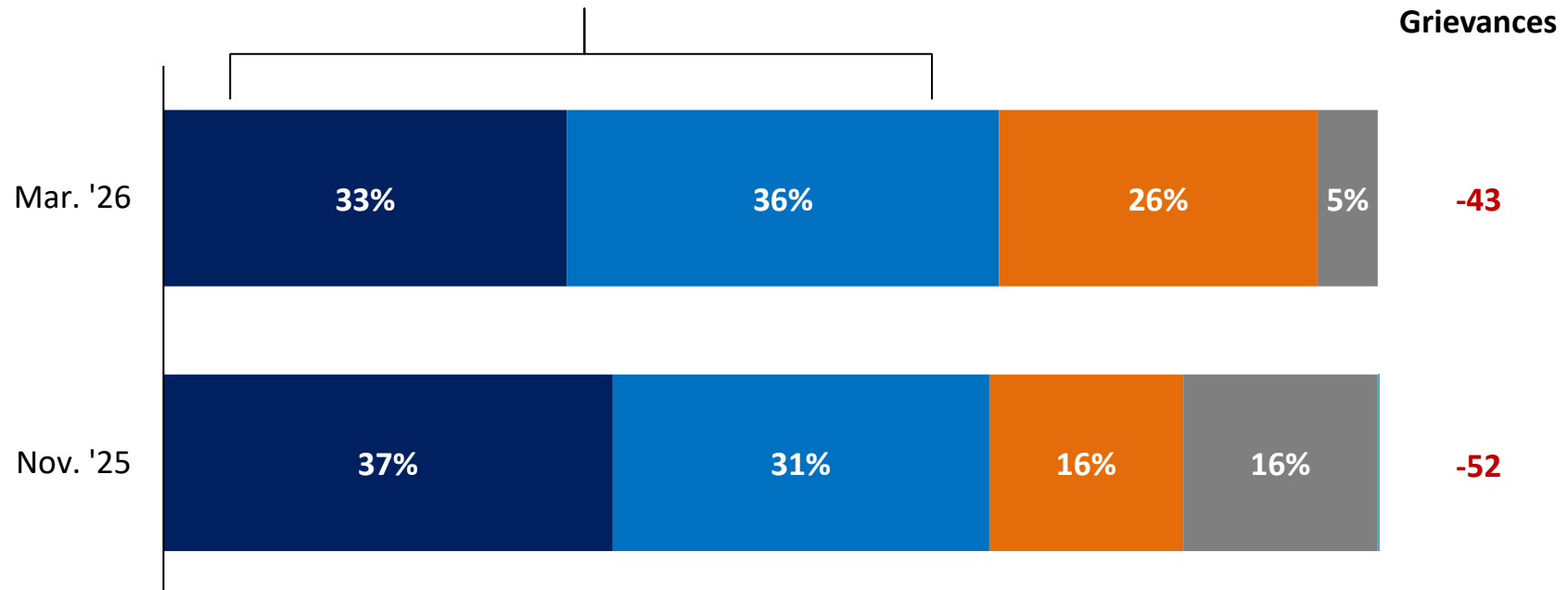


Which of the following is closer to your opinion?

[asked Only in AB, n=326]

Alberta has been treated unfairly:

69%



- Alberta has been treated unfairly by the federal government, and this MOU does not go far enough to address Alberta's concerns
- Alberta has been treated unfairly by the federal government, and this MOU is a good step towards more fairness and respect
- Alberta has always been treated fairly, and complaints about unfairness are not justified
- Don't know

Current data: March 2026

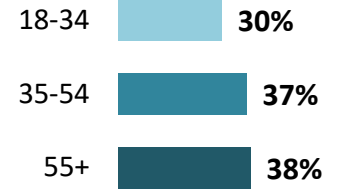
Segmentation

Respondents who say 'MOU does not go far enough'

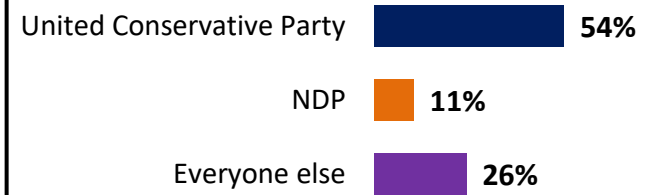
Age



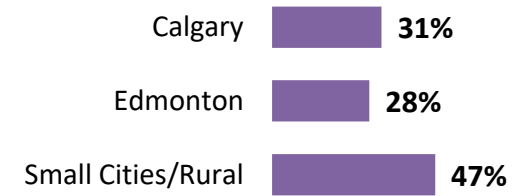
Party ID



Party ID



Region



Impression of MOU by AB's Grievances: 38% of those who think MOU does not go far enough still see it as a good thing

Grievances: Which of the following is closer to your opinion?

Q Impression: From what you know, does this Memorandum of Understanding sound like a good thing or a bad thing?

[asked of those that "have heard of" MOU in AB, n=326]

AB's Grievances: Alberta has been treated...

	Total	unfairly by the federal government, and this MOU does not go far enough to address Alberta's concerns	unfairly by the federal government, and this MOU is a good step towards more fairness and respect	fairly, and complaints about unfairness are not justified	Don't know*
	(n=326)	(n=116)	(n=108)	(n=85)	(n=16)
All good	7%	4%	12%	4%	5%
Mostly good	36%	34%	44%	33%	9%
Mix of good and bad	37%	40%	33%	38%	31%
Mostly bad	5%	6%	1%	8%	5%
All bad	4%	6%	2%	4%	0%
Don't know	12%	10%	7%	13%	50%
Good	43%	38%	56%	37%	14%
Bad	9%	12%	3%	11%	5%

Current data: March 2026

[*Results should be interpreted with caution due to the small sample size]

Direction of Approval Process by AB's Grievances: 40% who think MOU does not go far enough also think approval process is on wrong track

Grievances: Which of the following is closer to your opinion?



Approval process: Would you say the Federal government is moving in the right direction or on the wrong track?

[asked of those that "have heard of" MOU in AB, n=326]

AB's Grievances: Alberta has been treated...

Direction of Approval Process

	Total	unfairly by the federal government, and this MOU does not go far enough to address Alberta's concerns	unfairly by the federal government, and this MOU is a good step towards more fairness and respect	fairly, and complaints about unfairness are not justified	Don't know*
	(n=326)	(n=116)	(n=108)	(n=85)	(n=16)
Strongly right direction	9%	2%	9%	19%	9%
Somewhat right direction	37%	27%	44%	46%	15%
Neither right direction nor wrong track	22%	25%	25%	15%	20%
Somewhat wrong track	11%	11%	10%	14%	7%
Strongly wrong track	14%	29%	8%	3%	7%
Don't know	6%	5%	5%	3%	41%
Right direction	47%	30%	53%	65%	24%
Wrong track	25%	40%	17%	17%	14%

Current data: March 2026

[*Results should be interpreted with caution due to the small sample size]

Pace of Change BY AB's Grievances: 50% and more of Albertans with grievances see approval process as moving too slow

Grievances: Which of the following is closer to your opinion?

Pace of change: When thinking about how quickly the Federal government is trying to change how project approval works in Canada, which of the following is closest to your view?

[asked of those that "have heard of" MOU in AB, n=326]

AB's Grievances: Alberta has been treated...

	Total	unfairly by the federal government, and this MOU does not go far enough to address Alberta's concerns	unfairly by the federal government, and this MOU is a good step towards more fairness and respect	fairly, and complaints about unfairness are not justified	Don't know*
	(n=326)	(n=116)	(n=108)	(n=85)	(n=16)
Pace of Change					
The Federal government is moving too slow	47%	66%	50%	22%	22%
The Federal government is moving at about the right pace	34%	14%	35%	58%	36%
The Federal government is moving too fast	5%	4%	4%	7%	0%
I'm not sure	11%	13%	9%	10%	19%
Don't know	3%	2%	2%	3%	22%

Current data: March 2026

[*Results should be interpreted with caution due to the small sample size]

Methodology

Survey Methodology Nationally – March 06 to March 31, 2026



These are the results of an online survey conducted between March 06 and March 31, 2026.

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= 5,224 Canadian citizens, 18 years or older. The results are nationally weighted to n= 2,000 based on Census data from Statistics Canada.

Field Dates: March 06 to March 31, 2026.

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	469	9%	263	13.2%
Men 35-54	776	14.9%	316	15.9%
Men 55+	1,252	24%	389	19.5%
Women 18-34	527	10.1%	262	13.1%
Women 35-54	915	17.6%	332	16.7%
Women 55+	1,273	24.4%	431	21.6%
Region				
British Columbia	805	15.4%	280	14%
Alberta	572	10.9%	222	11.1%
Prairies	750	14.4%	131	6.6%
Ontario	1,646	31.5%	772	38.6%
Québec	1,006	19.3%	460	23%
Atlantic	445	8.5%	134	6.7%

Survey Methodology BC – March 06 to March 31, 2026



These are the results of an online survey conducted between March 06 and March 31, 2026.

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=805 BC citizens, 18 years or older. The results are nationally weighted to n=600 based on Census data from Statistics Canada.

Field Dates: March 06 to March 31, 2026.

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	69	8.6%	77	12.9%
Men 35-54	128	16%	93	15.6%
Men 55+	204	25.5%	120	20%
Women 18-34	66	8.2%	78	13%
Women 35-54	125	15.6%	98	16.4%
Women 55+	209	26.1%	132	22%
Region				
Lower Mainland and Fraser Valley	488	60.8%	358	59.7%
Vancouver Island and Sunshine Coast	159	19.8%	111	18.5%
Interior and North	156	19.4%	130	21.7%

Survey Methodology AB – March 06 to March 31, 2026



These are the results of an online survey conducted between March 06 and March 31, 2026.

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=572 Albertan citizens, 18 years or older. The results are nationally weighted to n=400 based on Census data from Statistics Canada.

Field Dates: March 06 to March 31, 2026.

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	57	10%	66	14.7%
Men 35-54	71	12.5%	77	17.2%
Men 55+	145	25.4%	77	17.1%
Women 18-34	65	11.4%	65	14.5%
Women 35-54	102	17.9%	82	18.2%
Women 55+	130	22.8%	82	18.2%
Region				
British Columbia	327	17.7%	174	13.9%
Alberta	190	10.3%	139	11.1%
Prairies	102	5.5%	84	6.7%

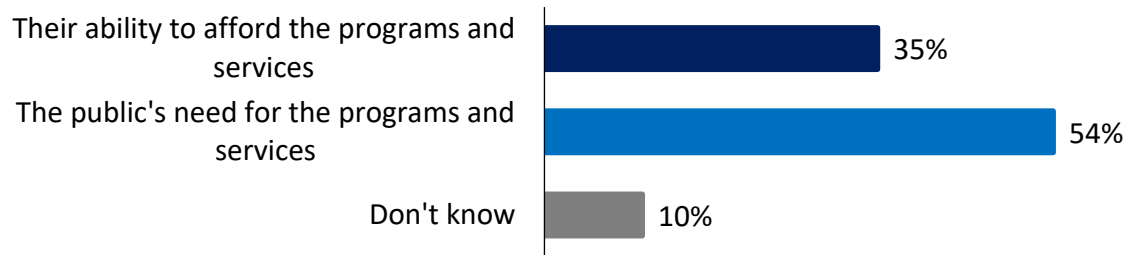
Appendices

Value clusters

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

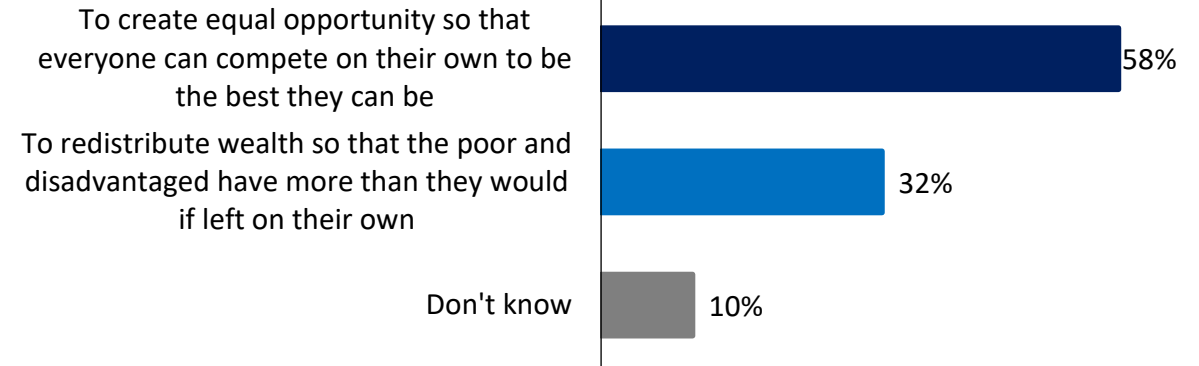
Q When governments make major decisions concerning spending on programs and services, do you think they should be basing their decisions mainly on...?

[asked of all respondents nationally; n=2000]



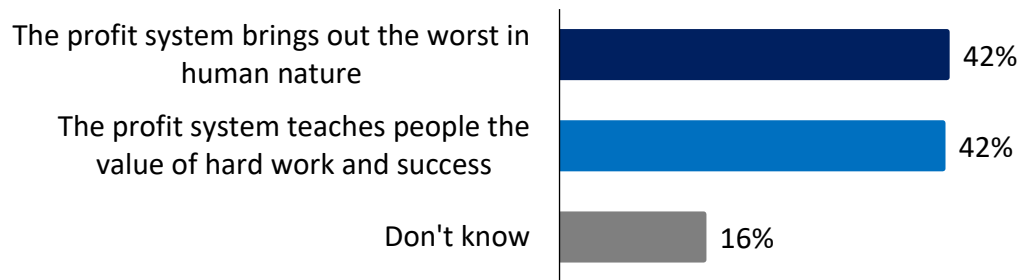
Q Is the main role of government to...?

[asked of all respondents nationally; n=2000]



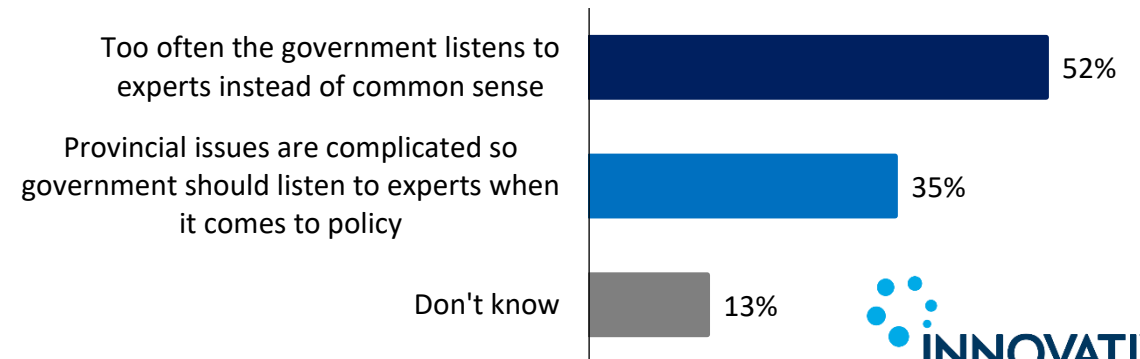
Q Which of the following statements comes closest to your view?

[asked of all respondents nationally; n=2000]



Q When it comes to government decision making, which of the following statements is closest to your view?

[asked of all respondents nationally; n=2000]



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

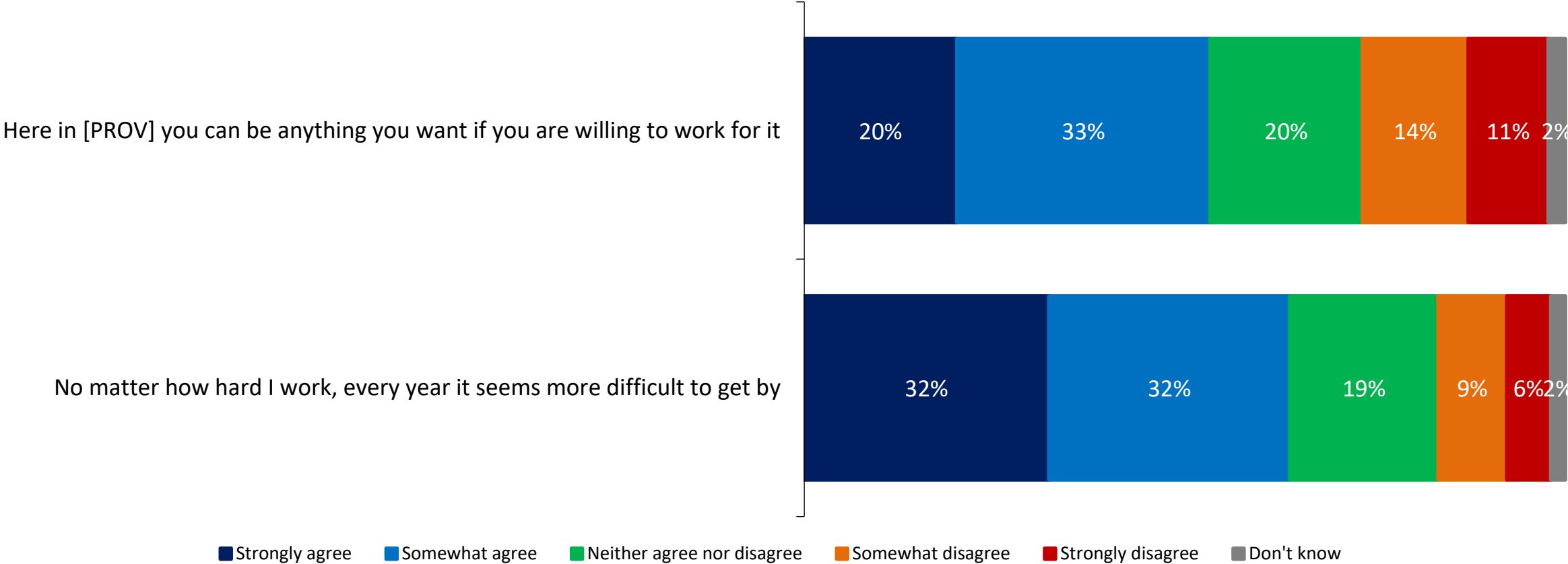
Core Political Values by Value Clusters

Column %		Populist Conservatives	Deferential Conservatives	Business Liberals	Left Liberals	Core Left	Pay-as-you-go Moderates
Governments should base decisions on...	Ability to afford	94%	88%	0%	0%	0%	77%
	Public Need	0%	0%	95%	91%	93%	0%
Is the main role of government to...?	Create equal opportunity	99%	74%	64%	96%	0%	39%
	Redistribute wealth	0%	19%	26%	0%	97%	31%
When it comes to government decision making...	Rely on common sense	100%	0%	45%	63%	48%	51%
	Listen to experts	0%	91%	44%	26%	41%	19%
The profit system...	Brings out the worst in human nature	0%	0%	0%	85%	84%	63%
	Teaches value of hard work and success	88%	91%	91%	0%	0%	7%

The Economic Gap

Segmentation Attitudes:

Q Do you agree or disagree with the following statements? -
[asked of all respondents; n=2000]

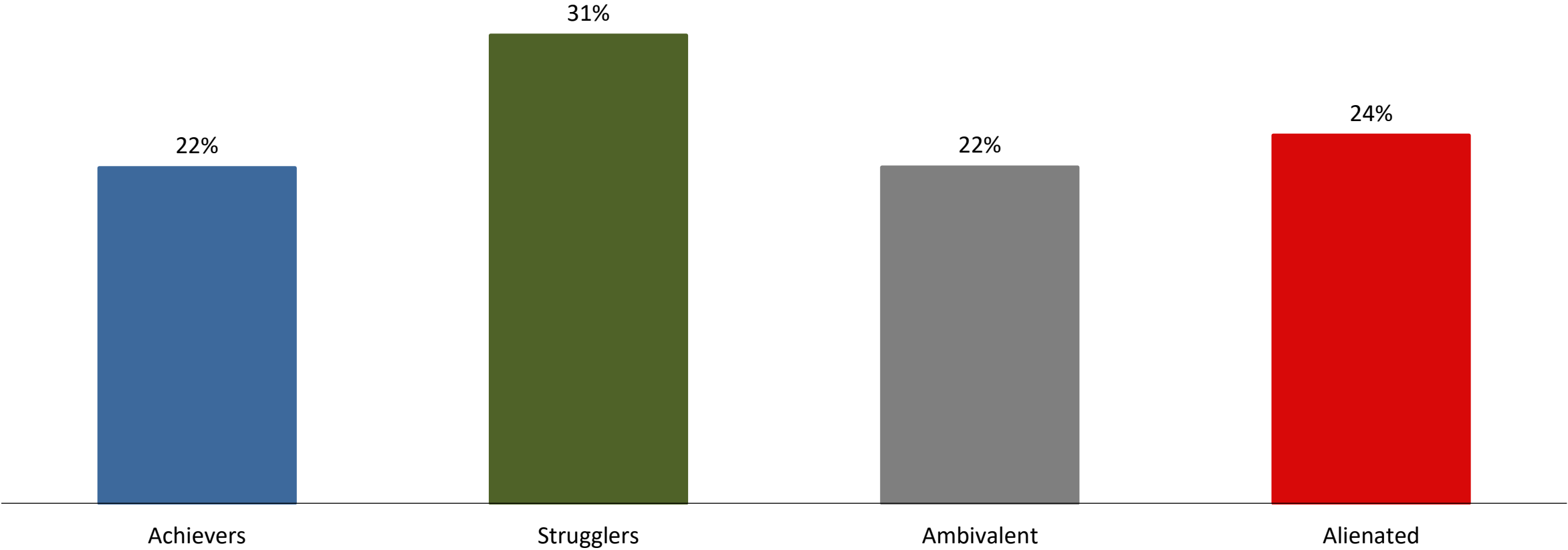


Economic Gap Segmentation:



Gap segmentation: Agree with 'Here in [PROVINCE] you can be anything you want if you are willing to work for it' BY Agree with 'No matter how hard I work, every year it seems more difficult to get by'.

[asked of all respondents; n=2000]



Decided Vote by Economic Gap:

		Economic Gap			
		Achievers	Strugglers	Ambivalent	Alienated
		(N=414)	(N=574)	(N=364)	(N=426)
Federal Decided Vote	Conservative	34%	40%	32%	38%
	Liberal	51%	38%	49%	36%
	NDP	5%	9%	11%	14%
	Bloc	6%	9%	5%	4%
	Green	3%	3%	2%	4%
	Other	1%	1%	1%	4%

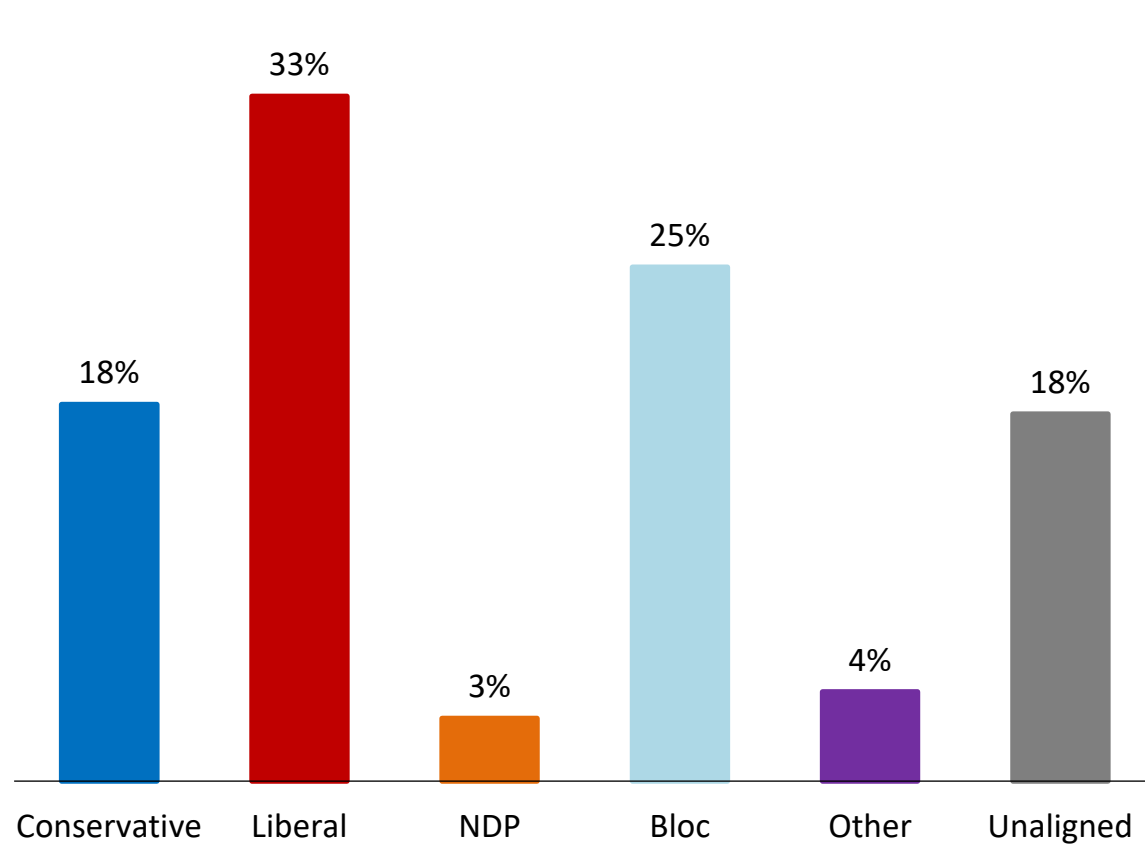
Note: Current data: March 2026

Party ID

Federal Party ID (Quebec vs. ROC): In QC more identify as liberals than Bloc (8-point lead); in ROC more identify as conservatives than liberals ⁴⁸

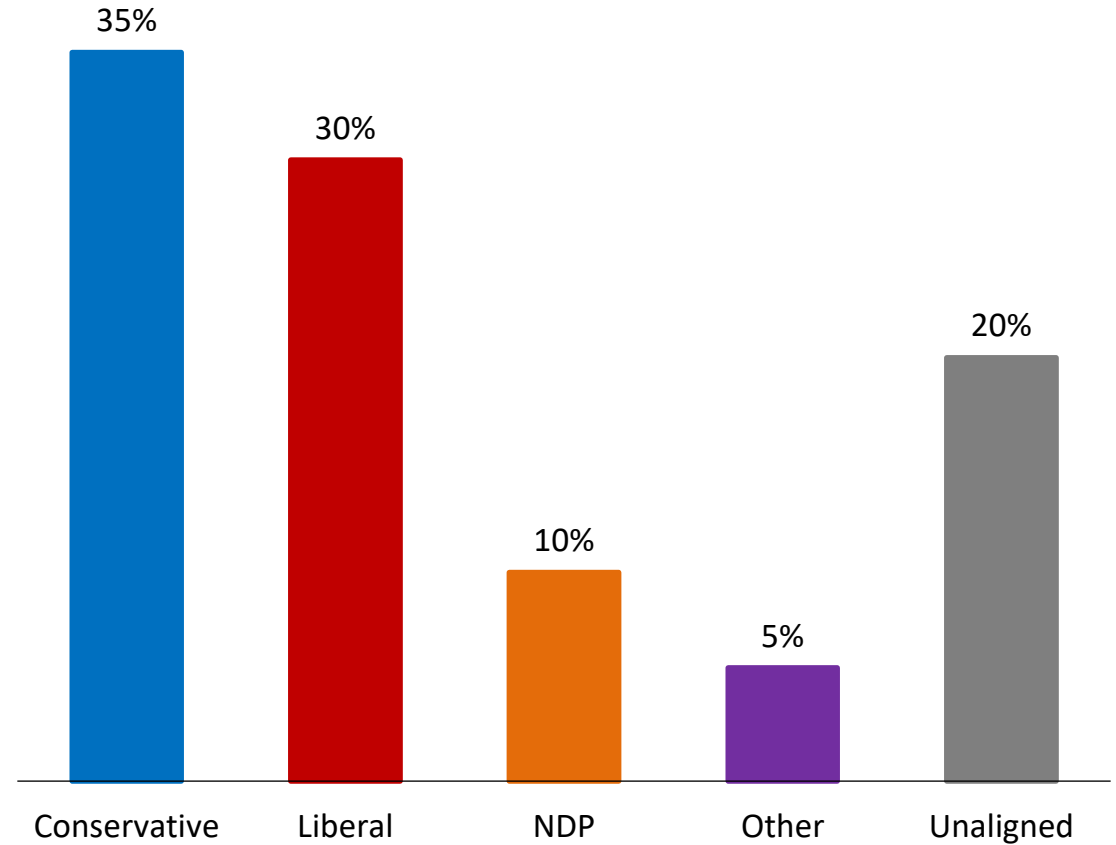
Party ID: Quebec

[Respondents in Quebec; n=460]



Party ID: Rest of Canada

[Respondents in the rest of Canada; n=1540]





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Building Understanding.

