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For Survey Research

2025 SERIES

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The Environics Institute for Survey Research was established by Michael Adams in 2006 with a mandate to conduct in-depth public opinion and social research on the issues shaping Canada's future. It is through such research that Canadians can better understand themselves and their changing society.

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The Confederation of Tomorrow surveys give voice to Canadians about the major issues shaping the future of the federation and their political communities. They are conducted annually by an association of the country's leading public policy and socio-economic research organizations.

The 2025 study consists of a survey of 5,391 adults, conducted between May 1 and June 16, 2025 (92% of the responses were collected between May 6 and May 29); 90% of the responses were collected online. The remaining responses were collected by telephone (both landline and cell phone) from respondents living in the North or on First Nations reserves, or from francophone respondents in New Brunswick.

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Background

While each level or “order” of government in Canada has its own area of jurisdiction, in practice, governments must work together to address most of the major issues facing the country. Progress in improving health care, expanding the supply of housing, addressing climate change, or facilitating energy exports relies, to a great extent, on ongoing federal-provincial or territorial cooperation, as well as the involvement of Indigenous governments which are increasingly exercising jurisdiction in these areas. Just a few years ago, the COVID-19 pandemic compelled governments to come together to coordinate their emergency measures. And in 2025, federal, provincial and territorial governments have met several times to discuss the response to the economic threats posed by new tariffs against Canadian exports imposed by the United States.

Reaching agreement between federal and provincial or territorial governments, across provinces and territories, and between Indigenous and non-Indigenous governments is often difficult. And citizens, hoping for progress, can be left frustrated when negotiations proceed slowly or break down.

Two main political events since the start of this year have affected the context in which the relations between governments in Canada are evolving. First, as mentioned, the imposition of U.S. tariffs, combined with the American president’s threats against Canada’s independence, have created a new sense of urgency. Second, the change of prime minister following the resignation of Justin Trudeau and the selection of Mark Carney as his successor, has led to a shift of both policy and leadership style at the federal level.

How have these events affected the public’s perception of the state of intergovernmental relations in the country? The latest survey finds that these events have been followed by a significant improvement in the public’s sense of how well their governments are working together. At the same time, after three consecutive years of increases, the proportion trusting neither the federal nor their provincial government to make the right decisions in several key policy areas has fallen.



Key Findings

- Just over one in two (52%) now say that the **federal and provincial governments are working very or somewhat well together** – an increase of 13 percentage points since 2024. The proportion that says they are not working well together has fallen to 41 percent, a drop of 13 points.
- **The improvement** in the public's assessment of the state of intergovernmental relations **has occurred in every region of the country** (with the exception of the North, where opinions were much more positive and have remained so).
- Among individual provinces, **the improvement since 2024 is largest in Saskatchewan**, where the proportion saying that the federal and provincial governments are working well together more than doubled.
- Despite this improvement, the proportion saying that the federal and provincial **governments are not working well together** still outweighs the proportion that says they are in two provinces: **Quebec and Alberta**.
- In the three provinces where the proportion saying that governments are not working well together is higher than average – Saskatchewan, Quebec, and Alberta – **opinions are more negative overall only because of the more negative views of their older residents**.
- Across the **Prairies, supporters of the provincial conservative parties (UCP, Saskatchewan Party or the Manitoba PCs) are much more likely to give a negative assessment** to intergovernmental relations than a positive one. This is not the case for the supporters of the Ontario PC Party, who are more likely to view relations positively than negatively.
- A plurality of Canadians **trusts the federal government more to manage trade relations with other countries**. The proportion trusting the federal government more in this area is higher than in the other four areas covered in the survey. In this area, there is relatively little variation in opinions across regions.
- After three consecutive years of increases, there has been a **drop in the proportions trusting neither the federal nor their provincial government** to deal with other key issues such as health care, climate change, immigration or the economy.

- The proportion of **Indigenous Peoples trusting their Indigenous health organization** more to manage the health care system is up slightly since 2024.
- Since 2024, the proportion **trusting neither government to address climate change has fallen** by seven percentage points. This change follows the removal of the federal consumer carbon tax after the change of prime minister earlier this year.
- In Canada outside of Quebec, the proportion **trusting neither government to manage immigration and refugee settlement has declined** by nine points.



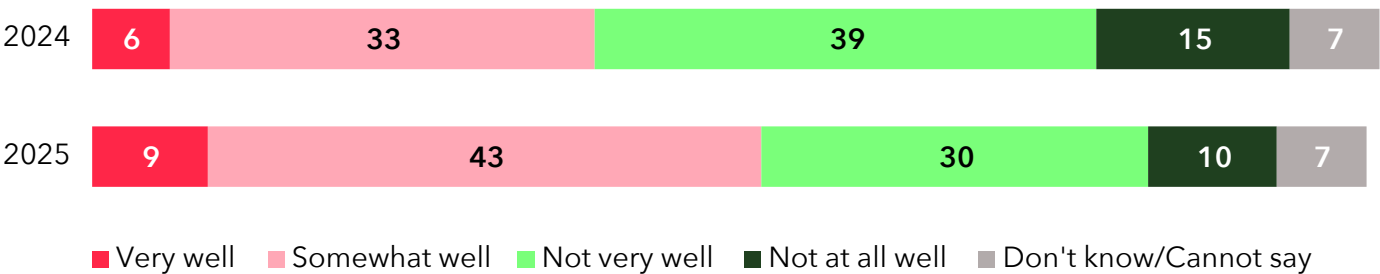
Working together

Over the past year, there has been a significant improvement in the public’s sense of how well their governments are working together.

In 2024, Canadians were more likely to say their governments are *not* working well together (54%) than to say that they are (39%). In 2025, the reverse is true. Just over one in two (52%) now say that the federal and provincial governments are working very or somewhat well together – an increase of 13 percentage points. The proportion that says they are not working well together (either not very well or not well at all) has fallen to 41 percent, a drop of 13 points.

Indigenous Peoples (56%) are slightly more likely than the Canadian average (52%) to say that federal and provincial or territorial governments are working well together.

Figure 1
Are governments working well together?
2024 – 2025



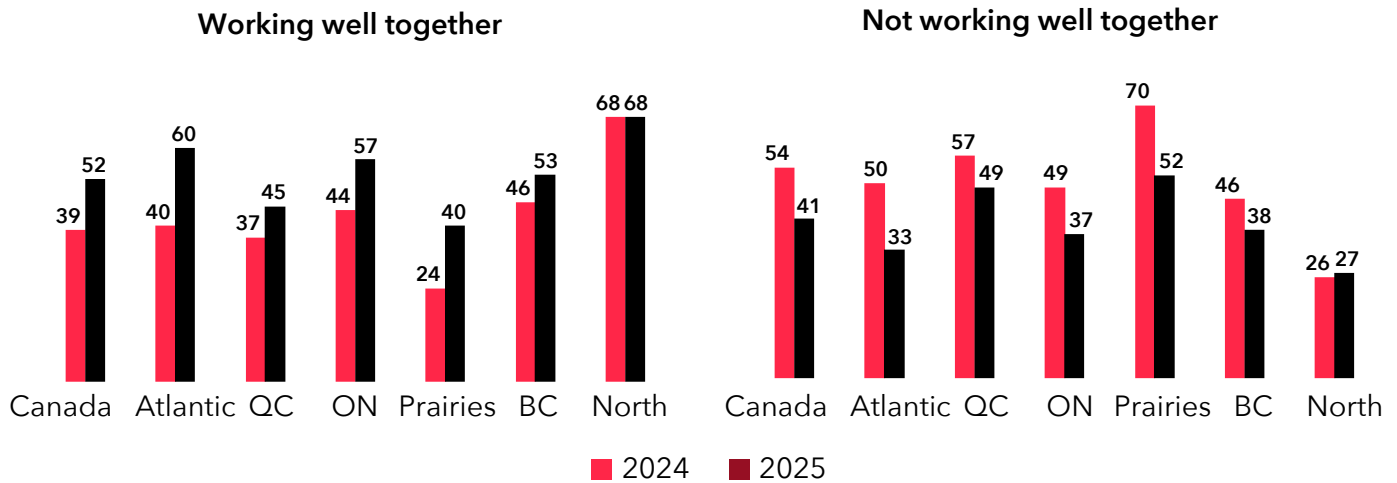
Do you think the federal and provincial governments are working very well together, somewhat well, not very well or are they not working at all well together?

The improvement in the public’s assessment of the state of intergovernmental relations has occurred in every region of the country, with the exception of the North, where opinions were much more positive and have remained so. In regions outside of the North, the increase since 2024 in the proportion saying that the federal and provincial governments are working well together is largest in Atlantic Canada (up 20 percentage points) and the Prairies (up 16 points). The increase is smallest in Quebec (up 8 points) and B.C. (7 points).

Figure 2

Are governments working well together?

2024 - 2025, by region



Do you think the federal and provincial governments are working very well together, somewhat well, not very well or are they not working at all well together?

Among individual provinces, the improvement since 2024 is largest in Saskatchewan, where the proportion saying that the federal and provincial governments are working well together more than doubled, from 19 to 47 percent (an increase of 28 points). There were also large increases in Nova Scotia (up 24 points) and New Brunswick (up 21 points).

Despite this improvement, in two provinces, the proportion saying that the federal and provincial governments are not working well together still outweighs the proportion that says they are. In Quebec, the negative view outweighs the positive one by just three percentage points. In Alberta, there is a much larger 25-point gap (although this is smaller than the 53-point gap registered in 2024).

Figure 3

Are governments working well together?

2025, by province

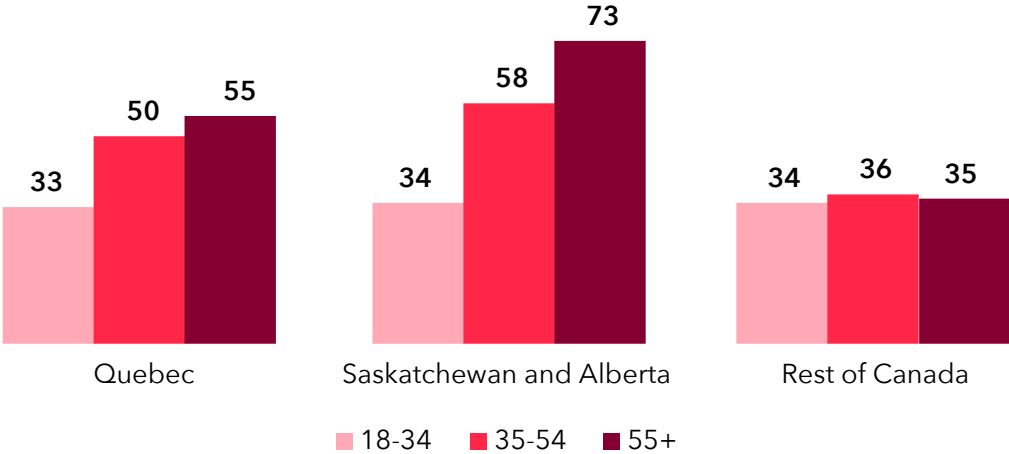


Do you think the federal and provincial governments are working very well together, somewhat well, not very well or are they not working at all well together?



There are important differences in opinions among age groups, but mainly in the three provinces where the proportion saying that governments are not working well together is higher than average: Saskatchewan, Quebec, and Alberta. Across all regions, about one in three of those age 18 to 34 give this negative assessment of intergovernmental relations. However, the proportion of those age 55 and older holding this view ranges from 35 percent outside these three provinces, to 55 percent in Quebec, and to 73 percent in Saskatchewan and Alberta (combined). In other words, opinions in Saskatchewan, Quebec, and Alberta are more negative overall only because of the more negative views of their older residents.

Figure 4
Federal and provincial governments are not working well together
2025, by age group and region



Do you think the federal and provincial governments are working very well together, somewhat well, not very well or are they not working at all well together?



There are also differences among supporters of different parties, but the pattern of these differences varies across regions and provinces.

In some provinces, supporters of the political party forming the provincial government are more likely than supporters of the party forming the official opposition to say that governments are working well together. This is the case:

- **In British Columbia**, where 64 percent of NDP supporters say that governments are working well together, compared to 39 percent of B.C. Conservative Party supporters.
- **In Manitoba**, where 59 percent of NDP supporters say that governments are working well together, compared to 42 percent of Progressive Conservative Party supporters.¹
- **In Ontario**, where 56 percent of Progressive Conservative Party supporters say that governments are working well together, compared to 47 percent of NDP supporters. In Ontario, however, supporters of the provincial Liberal Party (71%) are even more likely than supporters of the governing party to say relations are positive.

¹ The subsample size for PC supporters in Manitoba is very small (88) and should be treated with caution.

Quebec appears as one exception to this pattern, as supporters of the official opposition Quebec Liberal Party (69%) are more likely to say that governments are working well together than are supporters of the governing Coalition Avenir Québec (58%). However, supporters of the Parti Québécois, which is currently leading in the public opinion polls, are much less likely to hold this view (32%).

The situation is different in Saskatchewan and Alberta. In those two provinces, supporters of the governing party are less likely than supporters of the party forming the official opposition to say that the federal and provincial governments are working well together. In Saskatchewan, 38 percent of Saskatchewan Party supporters hold this view, compared to 50 percent of NDP supporters. In Alberta, only 22 percent of United Conservative Party supporters hold this view, compared to 37 percent of NDP supporters.

The situation in the Prairies forms an interesting contrast to that in Ontario. Across the Prairies, supporters of the provincial conservative parties (UCP, Saskatchewan Party or the Manitoba PCs) are much more likely to give a negative assessment to intergovernmental relations (68%) than a positive one (27%). This is not the case for the supporters of the Ontario PC Party, who are more likely to view relations positively (56%) than negatively (40%).

Across the Prairies, supporters of the provincial conservative parties (UCP, Saskatchewan Party or the Manitoba PCs) are much more likely to give a negative assessment to intergovernmental relations than a positive one. This is not the case for supporters of the Ontario PC Party.

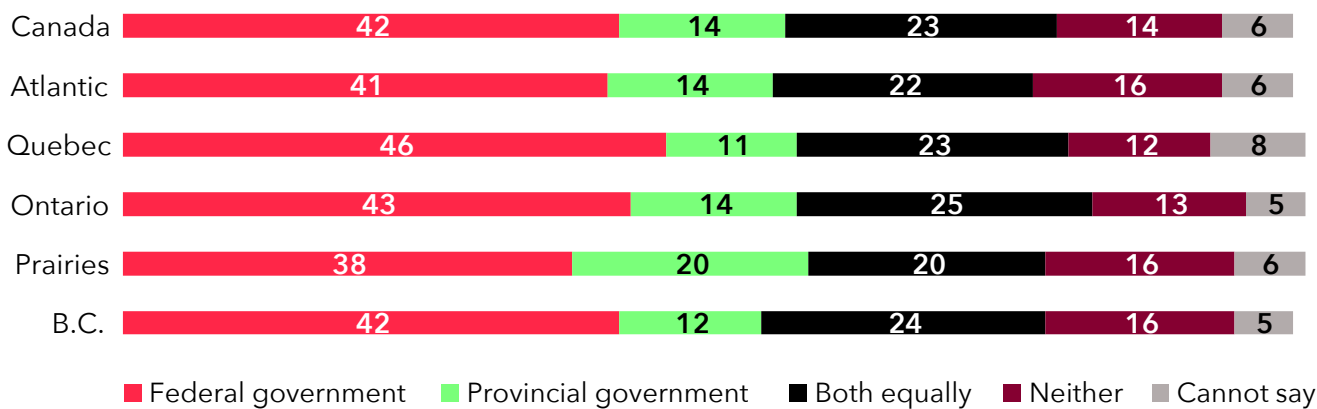
Interestingly, views of NDP supporters are similar in both cases. In the Prairies, 45 percent of NDP supporters (across the three provinces) say that governments are working well together, compared to 50 percent who say they are not. Among NDP supporters in Ontario, the respective proportions are 47 and 49 percent.

Managing trade relations with other countries

For the first time, the 2025 survey asked Canadians which government they trust more to make the right decisions in managing trade relations with other countries. While international trade agreements fall within the purview of the federal government, both federal and provincial leaders have been involved in developing a response to the tariffs imposed (or threatened to be imposed) by the U.S. government, and in making the case against tariffs in meetings with U.S. government representatives and in the U.S. media.

Canadians are much more likely to trust the federal government more in this area (42%) than in the other four areas covered in the survey. This is three times the proportion that trust their provincial government more (14%). About one in four (23%) trust both governments equally, and 14 percent trust neither government.

Figure 5
Which government do you trust more to make the right decisions in managing trade relations with other countries?
2025



*Which government do you trust more to make the right decisions in the following areas:
Managing trade relations with other countries? (Not asked in the territories).*

There is relatively little variation in opinions across regions. The proportion trusting the federal government more to manage international trade relations remains within a few percentage points of the national average, from a low of 38 percent in the Prairies to a high of 46 percent in Quebec.

Which government is most trusted²

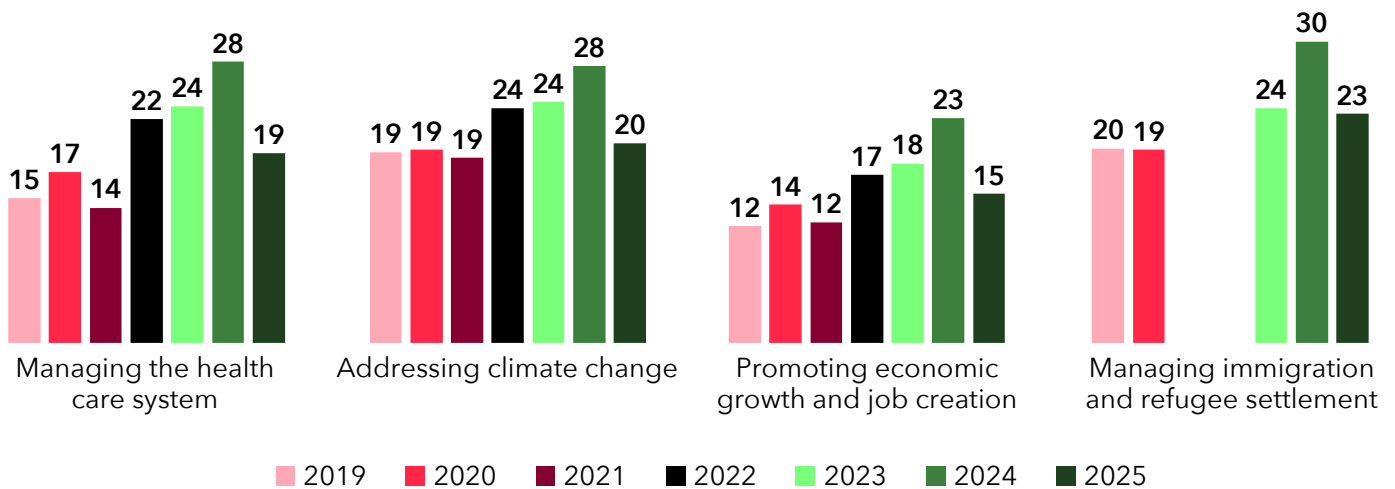
Last year, the *Confederation of Tomorrow* survey reported that Canadians were losing trust in the ability of both the federal government and their provincial governments to deal with key issues such as health care, climate change, immigration or the economy. Specifically, at that time, the annual surveys showed that a growing number of Canadians said they trusted neither level of government to address these issues.

The 2025 survey finds that this negative trend has been reversed. After three consecutive years of increases (between 2021 and 2024), the proportions trusting neither government fell between 2024 and 2025, in each of these four policy areas.

Figure 6

Proportion trusting neither the federal nor their provincial government to make the right decisions in each area

2019 – 2025



Which government do you trust more to make the right decisions in the following areas?

*Excluding the territories.

Generally speaking, as the proportions of Canadians trusting neither government have fallen, the proportions trusting the federal government more, their provincial government more, and both equally have all risen modestly – meaning that both levels of government have benefited somewhat from the improved public mood.

² Results in this section do not include the territories, as these survey questions were not asked in the territories each year.

Managing the health care system

Canadians are more likely to trust their provincial governments more (29%) than they are to trust the federal government more (19%) to make the right decisions in managing the health care system. One in four (24%) trust both governments equally, and 19 percent trust neither government. Since 2024, the proportion trusting neither government has fallen by nine points. The proportion trusting the federal government more has increased slightly (up 3 percentage points), while the proportion trusting their provincial government more (up 1 point) and trusting both equally (up 2 points) have changed very little.

In the Atlantic provinces, the proportion trusting neither government to make the right decisions in managing the health care system has fallen by 14 points since 2024, while the proportion trusting their provincial government more has increased by 12 points.

There has also been a larger than average drop in the proportions trusting neither government in the Prairie provinces and in Ontario (down 12 points and 10 points respectively). However, in these two cases, the proportions trusting their provincial government more did not change.³ The proportions trusting the federal government more, or both governments equally, increased slightly, as did the proportions who chose not to provide an answer.

Many Indigenous communities operate under layered federal-provincial-Indigenous arrangements, which present unique coordination challenges. In this survey, Indigenous Peoples have the option of saying whether they trust their Indigenous government or Indigenous health organization more (in addition to the other options). In 2025, 16 percent of Indigenous Peoples, and 19 percent of First Nations peoples, said they trust their Indigenous government or Indigenous health organization more to make the right decisions in managing the health care system, compared to 21 percent who trust the federal government more, 23 percent who trust their provincial (or territorial) government more, 20 percent who trust all these governments equally, and 14 percent who trust none of these governments. The proportion of Indigenous Peoples trusting their Indigenous health organization more to manage the health care system is up slightly (by 4 points) since 2024, while the proportion trusting no government is down by six points.

3 There was a one-point increase in the Prairies, which is not significant. There was no increase in Ontario.

Addressing climate change

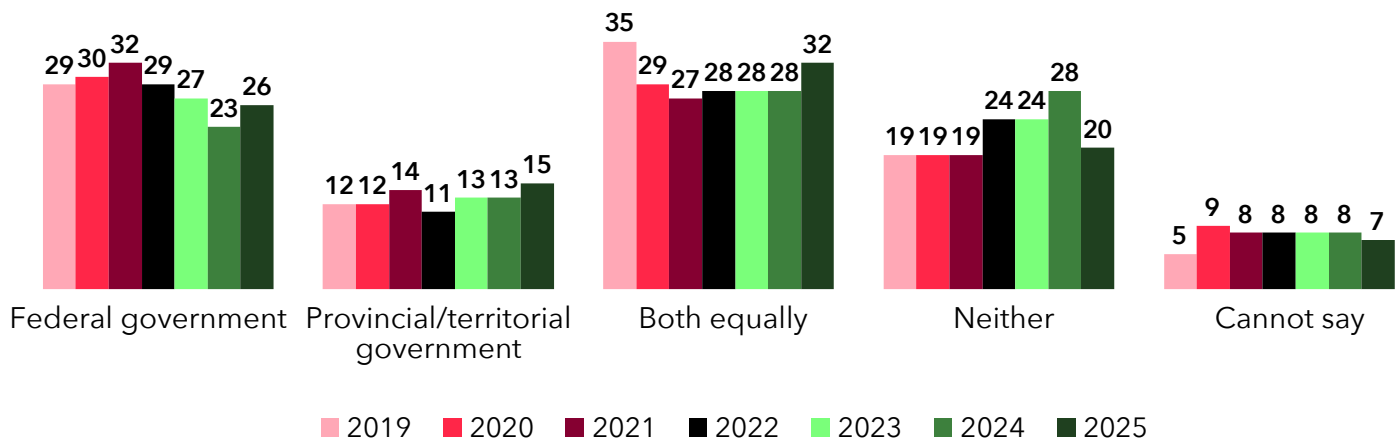
A small plurality of Canadians trusts both the federal and their provincial governments equally (32%) to make the right decisions in addressing climate change. Somewhat fewer trust the federal government more (26%) and only 15 percent trust their provincial government more. An additional 20 percent trust neither government.

Since 2024, the proportion trusting the federal government more has increased slightly (up 3 percent points), as has the proportion trusting their provincial government more (up 2 points) and trusting both equally (up 4 points), while the proportion trusting neither has fallen by eight points. These changes follow the removal of the federal consumer carbon tax after the change of prime minister earlier this year.

Figure 7

Which government do you trust more to make the right decisions in addressing climate change?

2019 - 2025



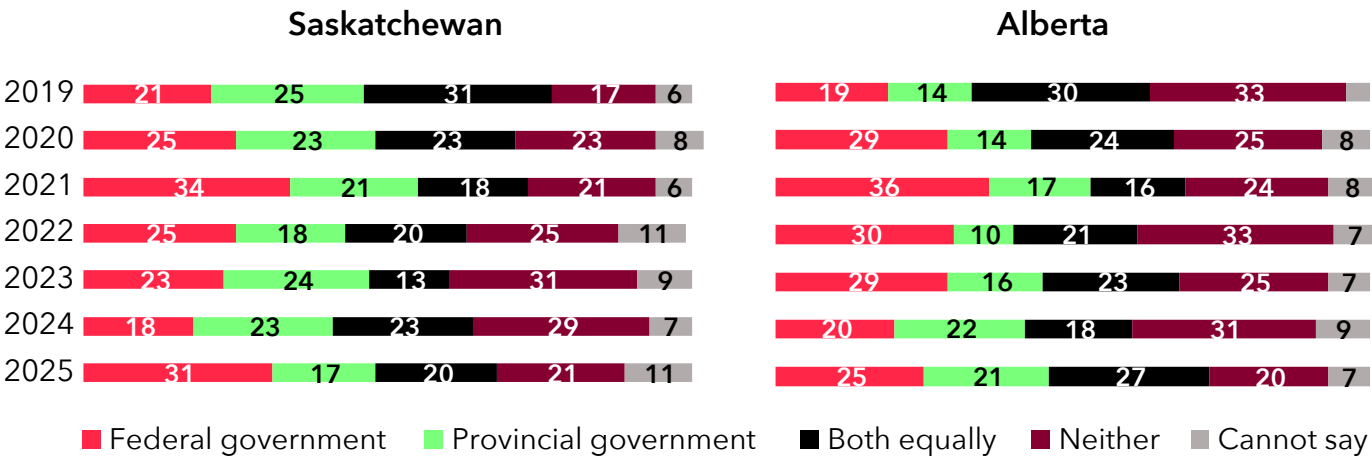
Which government do you trust more to make the right decisions in the following areas:
Addressing climate change?

*Excluding the territories.

The proportion trusting neither government to address climate change has declined most in Nova Scotia (down 10 points), Ontario (down 10 points) and Alberta (down 12 points). In Ontario and Alberta, it is the proportion that trusts both governments equally that has risen most (by 7 points and 10 points respectively). But in Nova Scotia, the main increase is seen in the proportion trusting the federal government more (up by 7 points).

It is in Saskatchewan, however, where the proportion trusting the federal government more on climate has seen the biggest increase since 2024 (up by 13 points).

Figure 8
Which government do you trust more to make the right decisions in addressing climate change?
2019 – 2025



*Which government do you trust more to make the right decisions in the following areas:
Addressing climate change?*

Among Indigenous Peoples, the proportion trusting neither government to address climate change has also fallen, by nine points (from 31% in 2024 to 22% in 2025).

Promoting economic growth and job creation

As is the case with addressing climate change, a small plurality of Canadians trusts both the federal and their provincial governments equally (32%) to make the right decisions in promoting economic growth and job creation. Slightly fewer trust their provincial government more (26%), and fewer again trust the federal government more (20%). An additional 15 percent trusts neither government, a decline of seven percentage points since 2024.

As the proportion trusting neither government to promote economic growth and job creation has declined, the proportion trusting the federal government more has increased in some provinces, notably in Saskatchewan (up 10 points) and Alberta (up 7 points). Despite this change, residents in these two provinces remain the most likely to trust their provincial governments more in this area (32% and 36% respectively).

In Newfoundland and Labrador and in Nova Scotia, the decline in the proportion trusting neither government was accompanied by an increase in the proportion trusting their provincial government more (up by 11 and 6 points respectively).



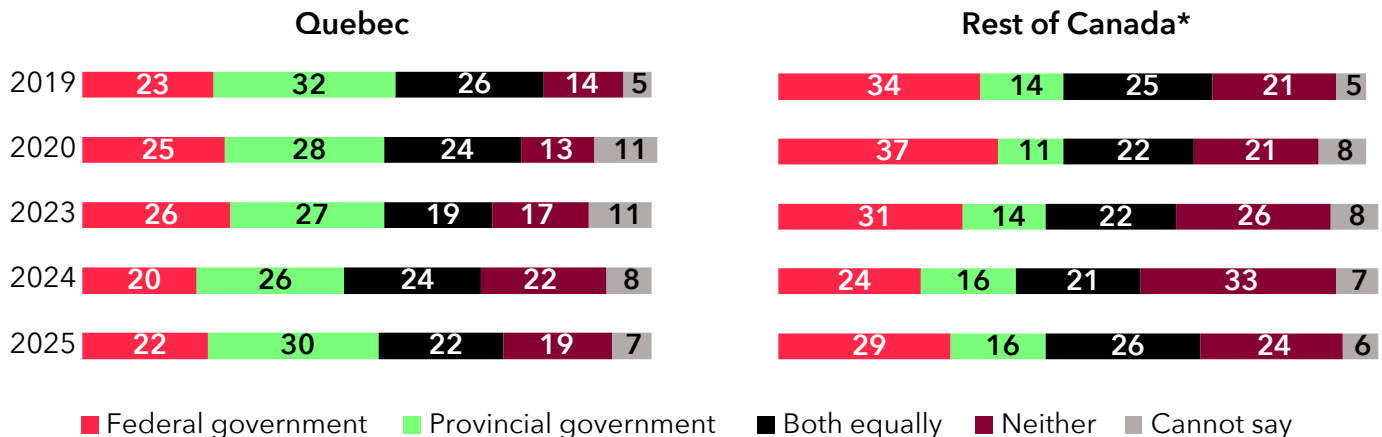
Managing immigration and refugee settlement

When it comes to which government is trusted more to make the right decisions in managing immigration and refugee settlement, views across the country as a whole are fairly evenly divided: 27 percent trust the federal government more, 19 percent trust their federal government more, 25 percent trust both governments equally, and 23 percent trust neither government. However, there remains a difference in opinion between Quebec and the rest of Canada. In Quebec, where the provincial government plays a larger role in immigration policy, residents are somewhat more likely to trust their provincial government more (30%) than they are to trust the federal government more (22%). Outside Quebec, the reverse is true, with only 16 percent trusting their provincial government more and 29 percent trusting the federal government more.

Figure 9

Which government do you trust more to make the right decisions in managing immigration and refugee settlement?

2019 - 2025



Q.25d: Which government do you trust more to make the right decisions in the following areas:
Managing immigration and refugee settlement?

*Excluding the territories.

There has been relatively little change in opinions in Quebec since 2024; in that province, the proportion trusting neither government has fallen only modestly, by four percentage points. The drop in the proportion trusting neither government is larger in Canada outside Quebec (down 9 points). Outside of Quebec, the proportions trusting the federal government more, and the proportions trusting both governments equally, are both up by five points.



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