

Tracking Perceptions on US-Canada Relations

Canadian-American Annual Survey Summary – Year 11

*by Nanos, January 2016
(Submission 2015-699)*



The Nanos-UB North American Monitor

Year 11 of Tracking

In 2005, Nanos Research, in partnership with the State University of New York at Buffalo embarked on a co-operative research initiative. The objective of the initiative was to add to the unfolding dialogue and discussion on Canada-US relations in a manner that engaged stakeholders, institutions, and entrepreneurs in a direct fashion. Now in its eleventh wave of tracking, the current wave of research is based on the opinions of 1,000 Canadians and 1,000 Americans. Parallel questions on bi-national issues are tracked by means of a hybrid telephone and online random sample of Canadians in the month of August, and a random representative online sample of Americans conducted in the month of December.

A Nanos RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians was conducted between August 20th and 23rd, 2015 as part of an omnibus survey. Participants were randomly recruited by telephone (land- and cell-lines) and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted using the latest Census data. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20. Between December 19th and 23rd, 2015, a random representative online survey of 1,000 Americans was conducted. Results were statistically checked and weighted using the latest Census data.

The comparative countries tested in the research grid are based on the top trading partners common to both countries, including: Britain; Japan; France; Germany; China; and, Mexico. This initiative is intended as a mechanism through which Canadian and American regional and national stakeholders and institutions can (i) measure ongoing public opinion on issues relevant to the Canada-US relationship; and, (ii) continue the dialogue among key national, state and provincial government and business stakeholders.



Americans and Canadians see the British as representing their values; however, international cooperation between the US and Canada on the rise

The Nanos-UB North American Monitor has been tracking the sentiment of Canadians and Americans for eleven years. A look at the data trends suggests changing perceptions of the bi-national relationship.

In the last year Canadians now see Britain as the closest to them in terms of family values for the first time since tracking began, their opinions of Americans as closest continuing to fall, after a two-way tie between the United States and the United Kingdom in 2014.

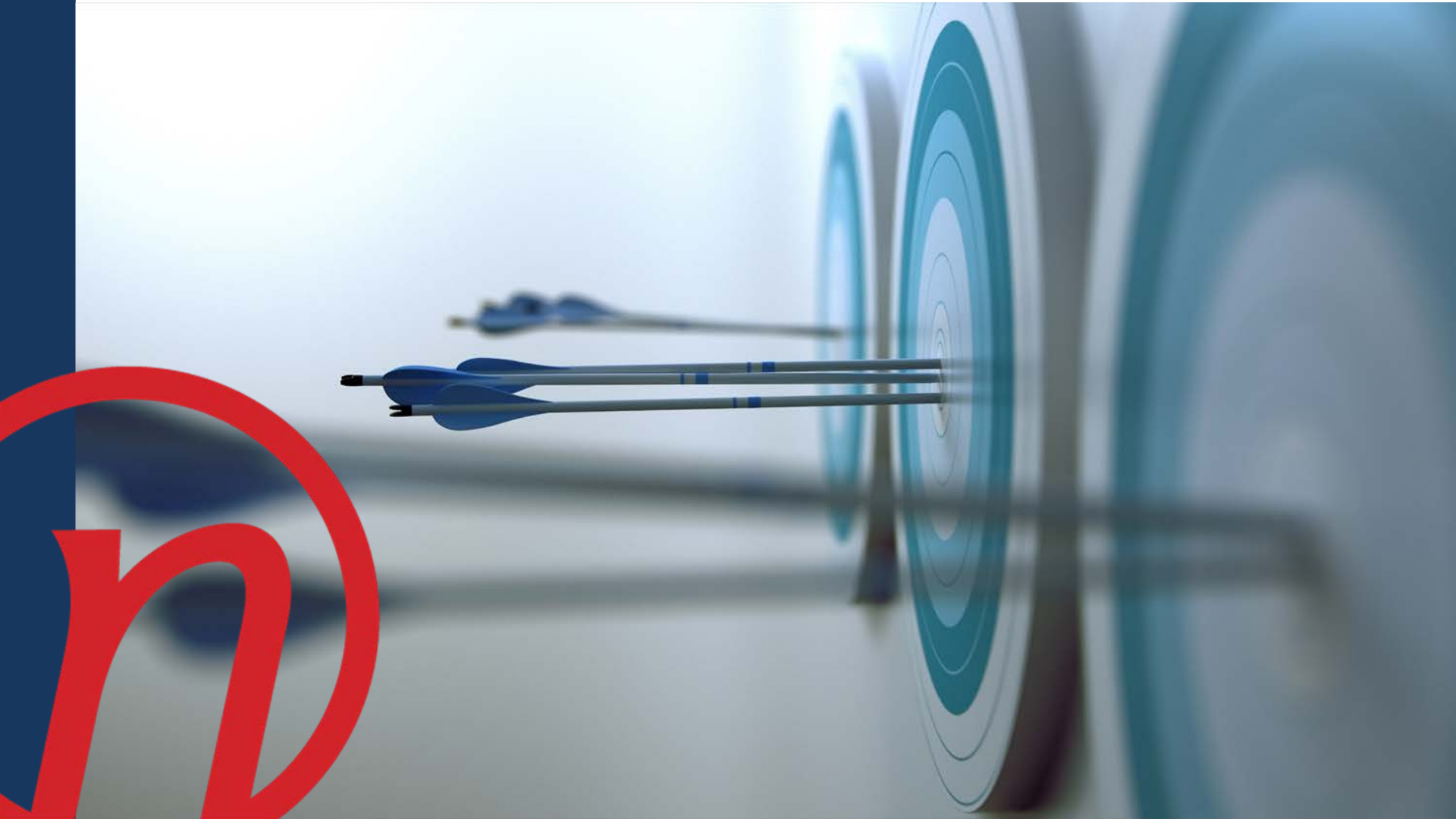
Americans, when asked about which country is closest in terms of business values narrowly chose Britain for the first time since tracking began, with Canada as a close second.

Though over the past few years there has been erosion in support in both the United States and Canada for closer cooperation on national security, there has been a move towards more cooperation in the last year for both nations. Regarding border security, while the decline seen since the beginning of tracking continues to persist in Canada (2005 – 75%; 2015 – 56%) there has been an upswing among Americans, and support for closer cooperation has increased in the last year.

While closer cooperation on anti-terror measures between the two nations is increasing in the US, the appetite in Canada remains stagnant and unchanged since 2014. However, moving towards an integrated energy policy to reduce dependence on Middle Eastern oil has seen an increase in support in both countries.

Bi-National Tracking Numbers

North American Monitor – Tracking perceptions on US-Canada relations
Any use of this research data should identify it as a “Nanos/UB Survey”



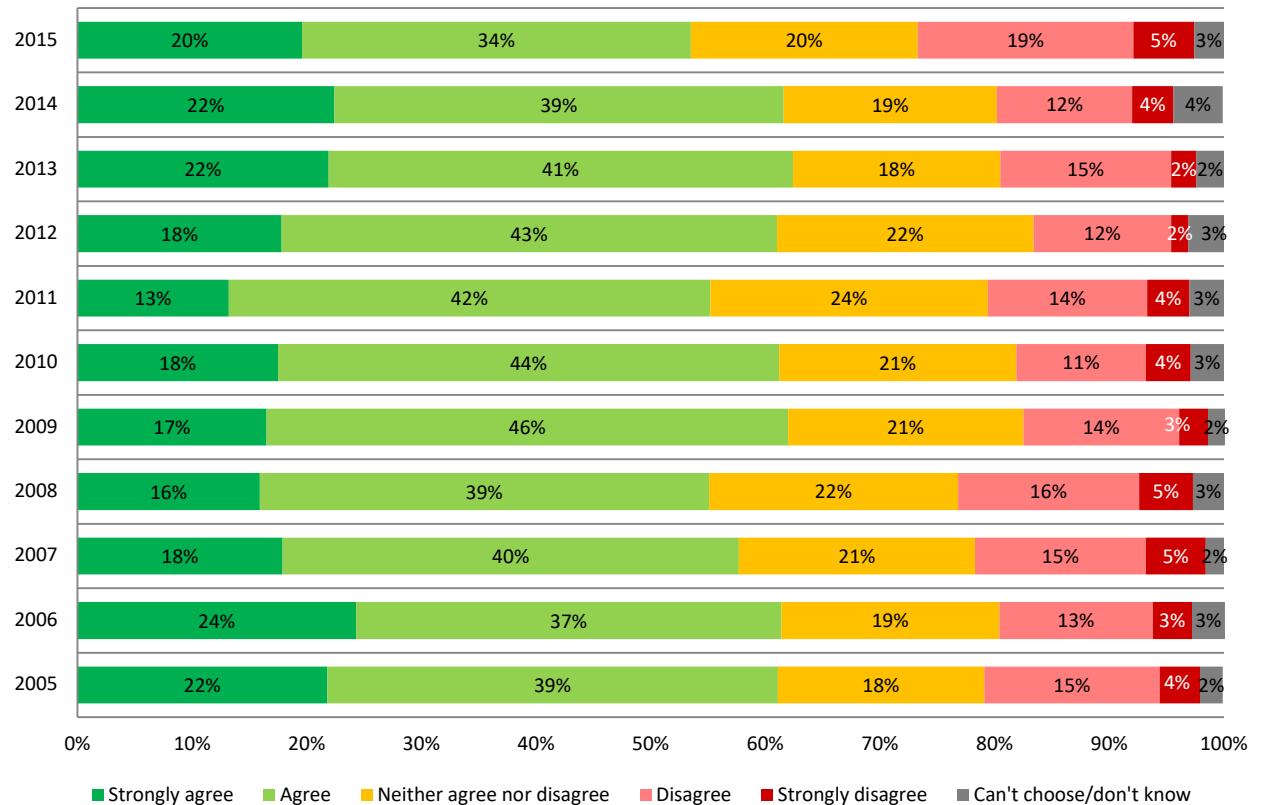
Following Interests

Question: Canada should follow its own interests, even if this leads to conflict with other nations. Do you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree?

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Canadians on whether Canada should follow its own interests...



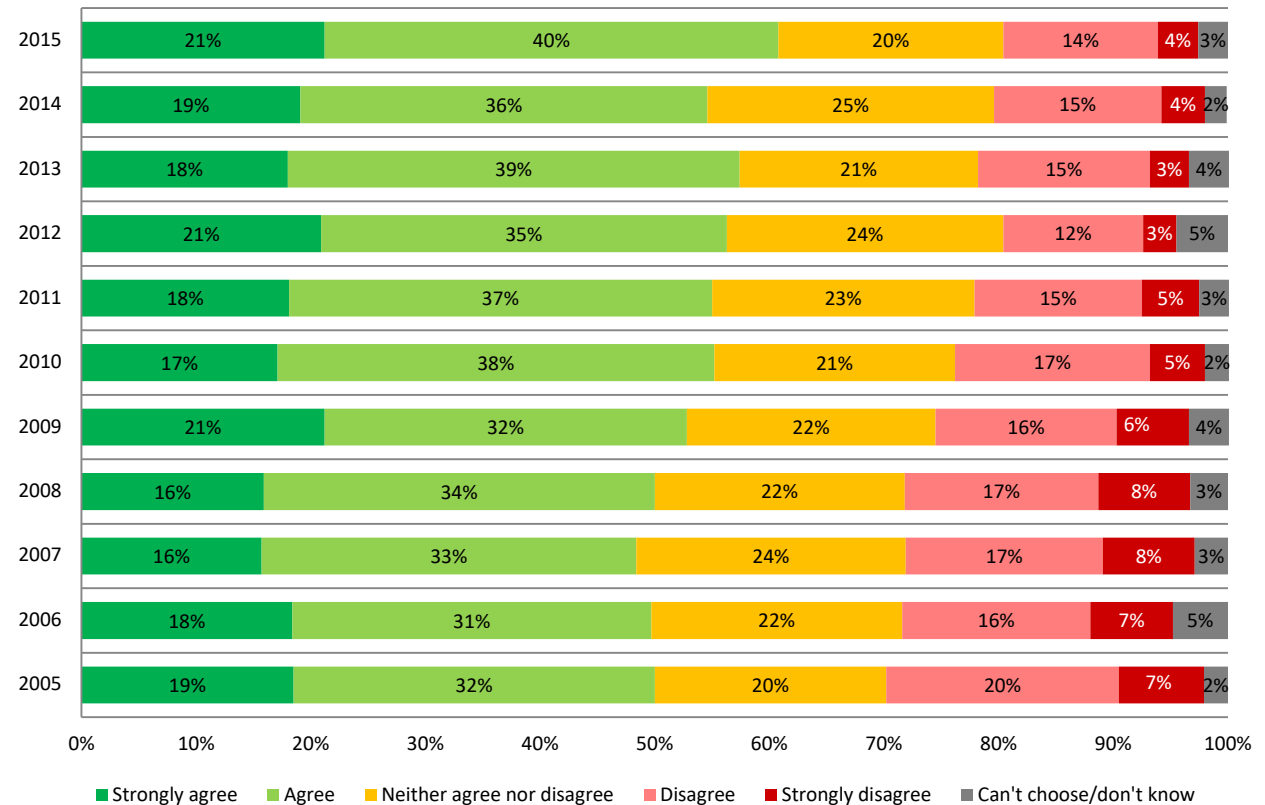
Following Interests

Question: The US should follow its own interests, even if this leads to conflict with other nations. Do you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree?

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Americans on whether the US should follow its own interests...



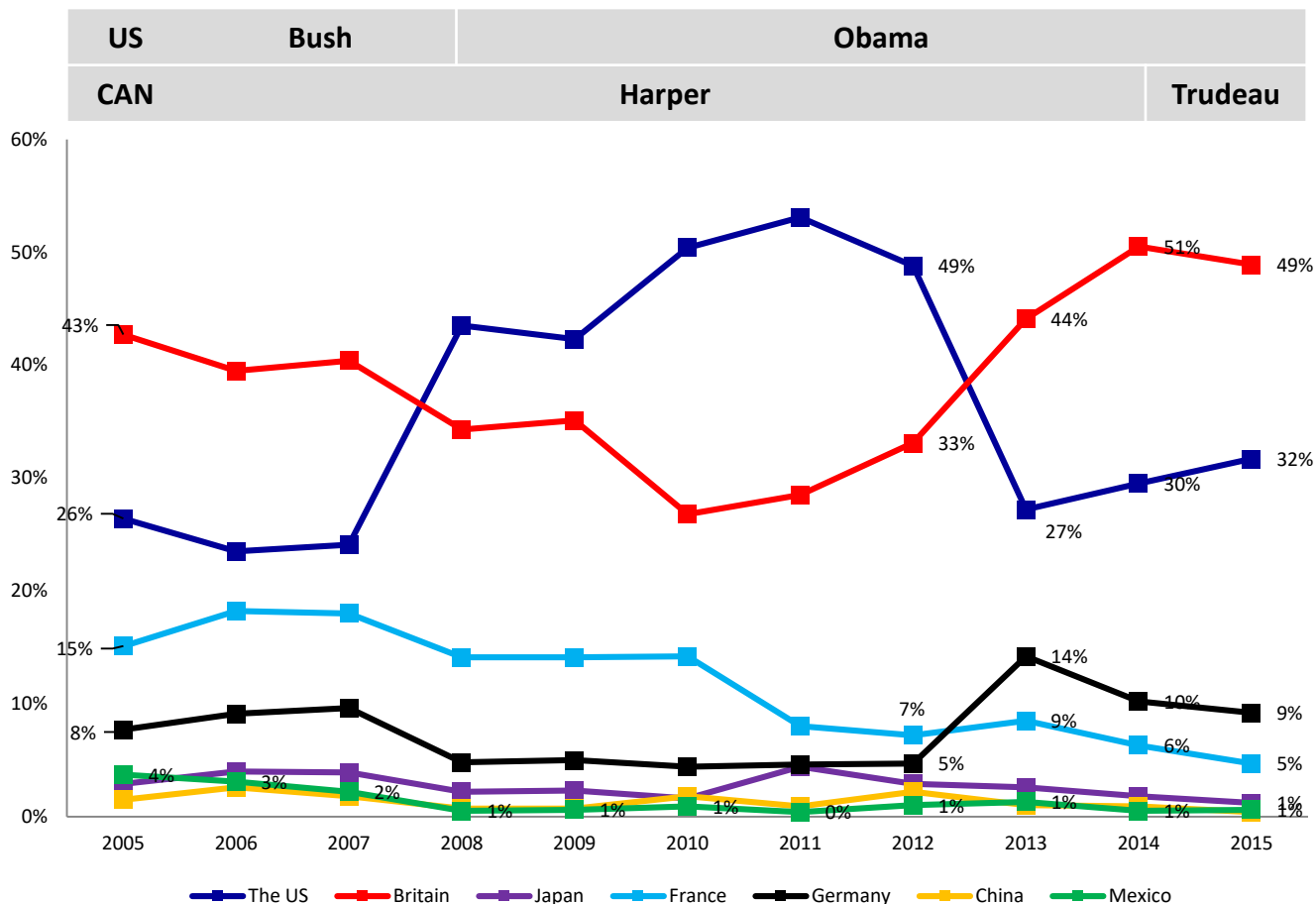
Human Rights

Question: Thinking about Canada in relation with the countries below, could you please identify the first and second ranked countries that are closest with Canada in terms of human rights?
[ROTATE]

Data displayed represents first ranked responses.

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Canadians on which country is closest in terms of human rights...



Human Rights

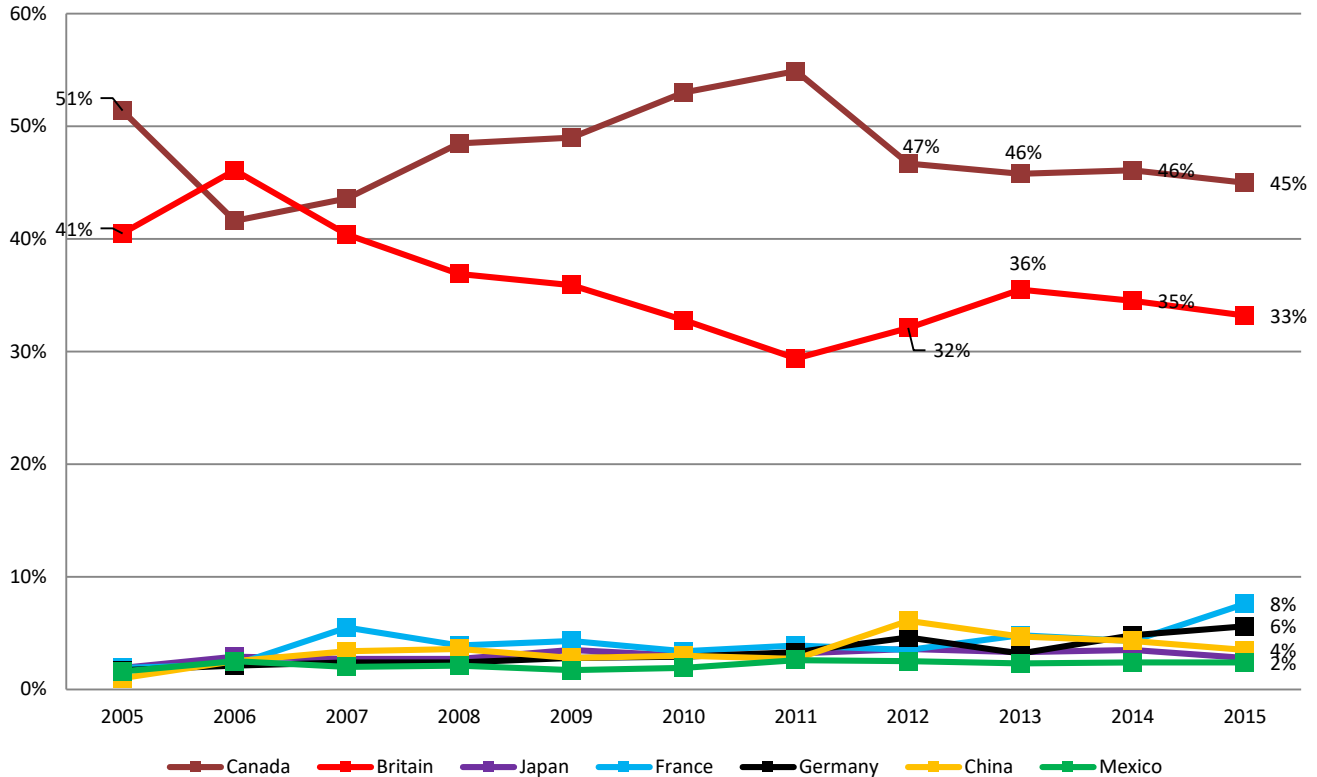
Question: Thinking about the US in relation with the countries below, could you please identify the first and second ranked countries that are closest with the United States in terms of human rights?
[ROTATE]

Data displayed represents first ranked responses.

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Americans on which country is closest in terms of human rights...

US	Bush	Obama	
CAN	Harper		Trudeau



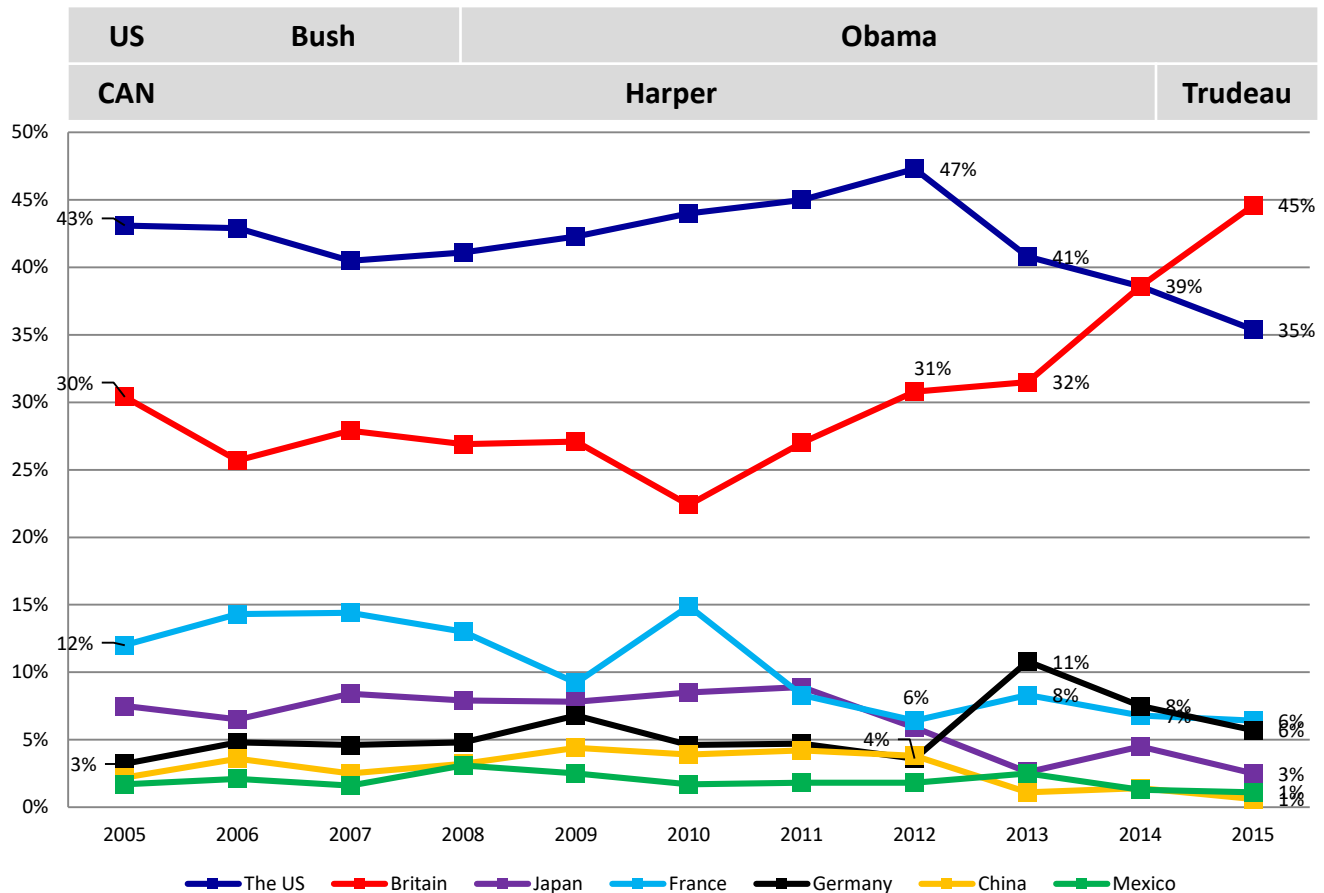
Family Values

Question: Thinking about Canada in relation with the countries below, could you please identify the first and second ranked countries that are closest with Canada in terms of family values?
[ROTATE]

Data displayed represents first ranked responses.

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Canadians on which country is closest in terms of family values...



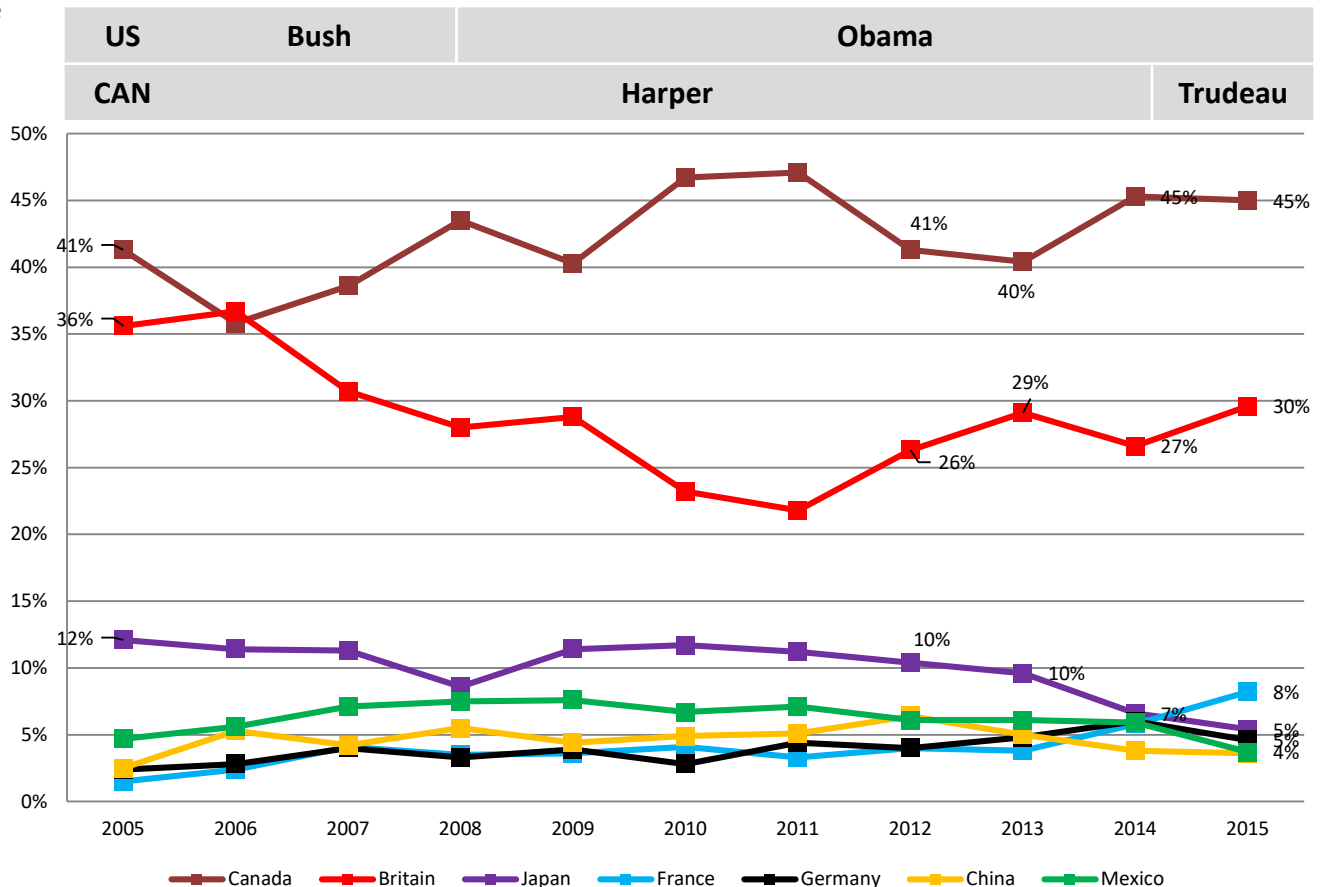
Family Values

Question: Thinking about the US in relation with the countries below, could you please identify the first and second ranked countries that are closest with the United States in terms of family values?
[ROTATE]

Data displayed represents first ranked responses.

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Americans on which country is closest in terms of family values...



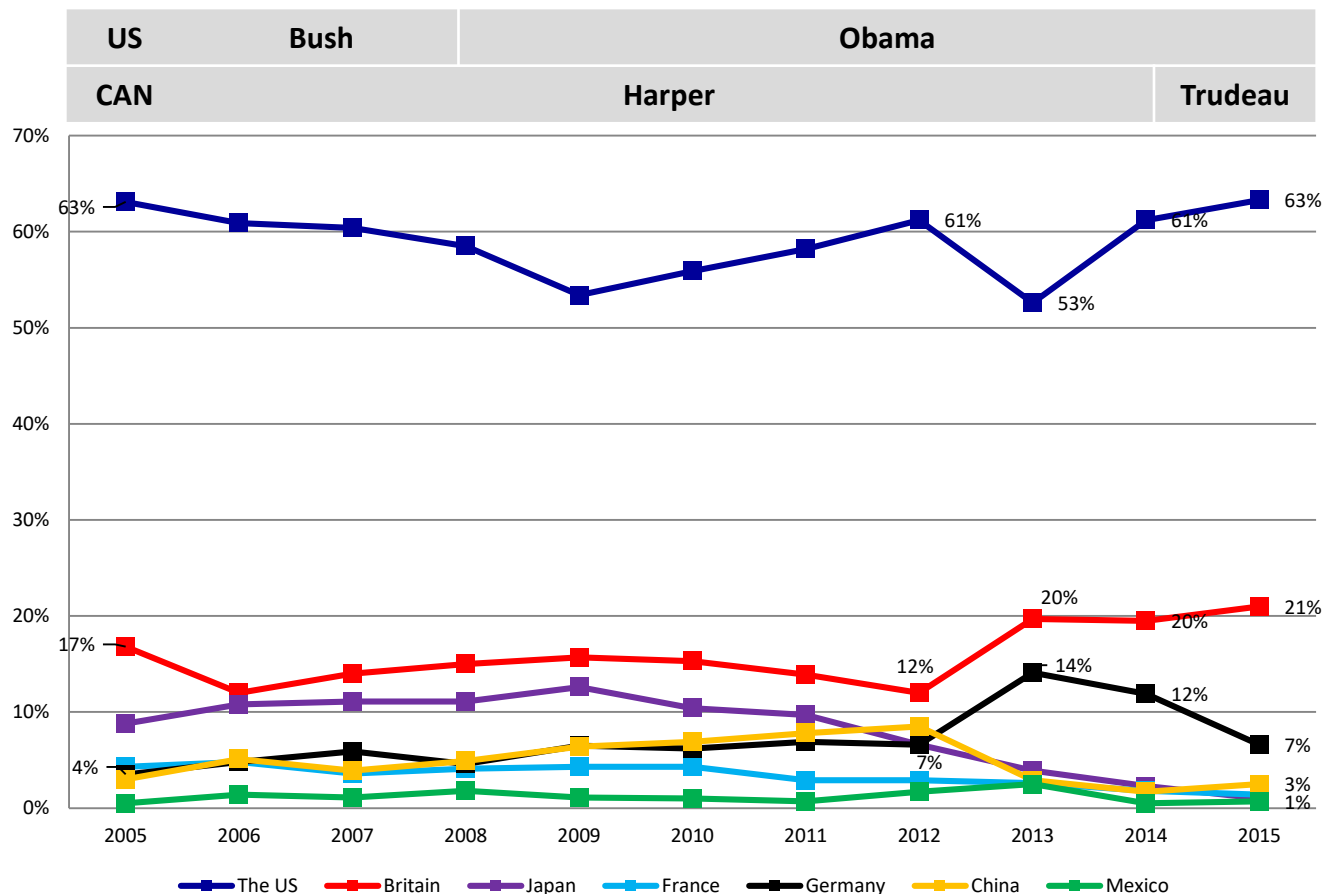
Business Values

Question: Thinking about Canada in relation with the countries below, could you please rank the top two countries that are closest with Canada in terms of business values? [ROTATE]

Data displayed represents first ranked responses.

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Canadians on which country is closest in terms of business values...



Business Values

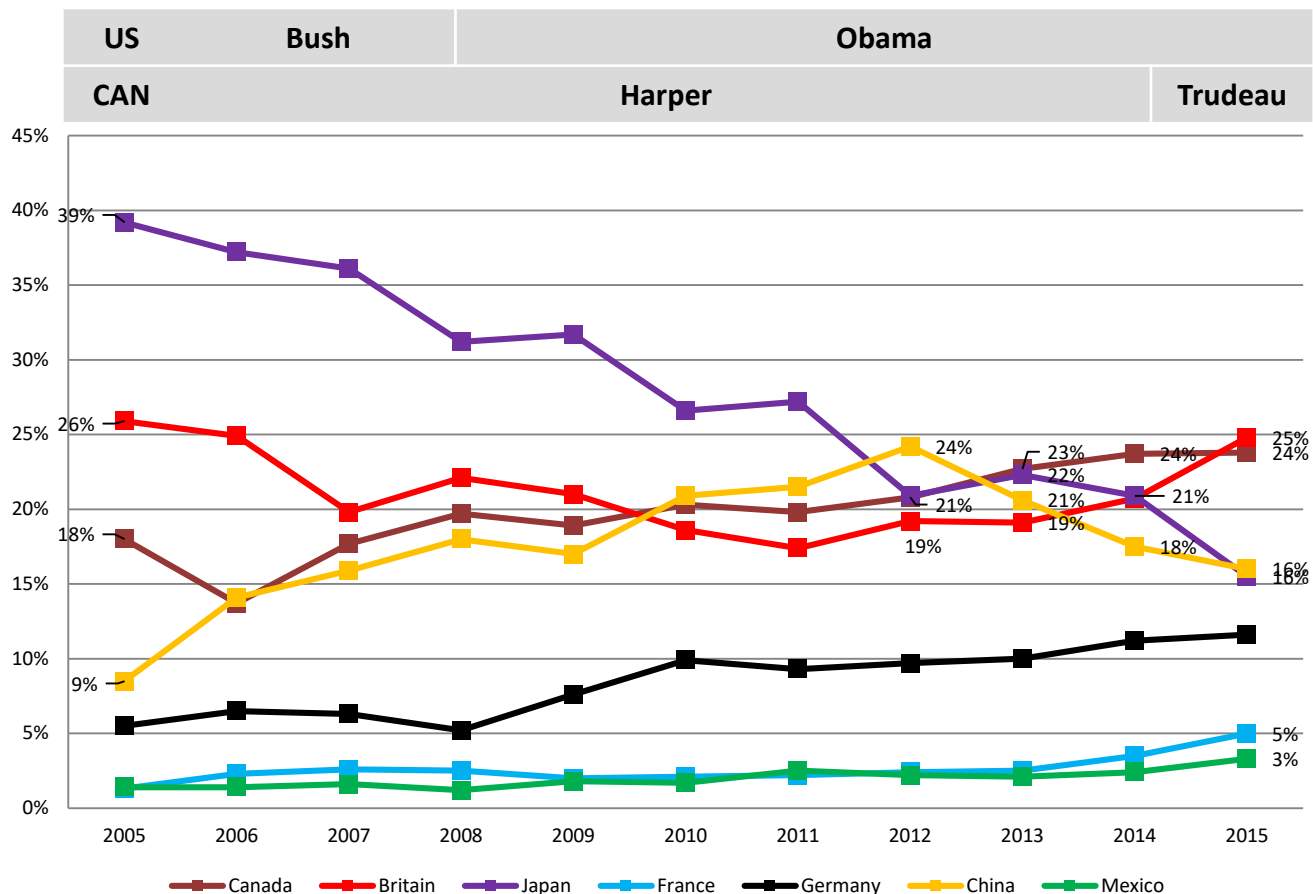
Question: Thinking about the US in relation with the countries below, could you please rank the top two countries that are closest with the United States in terms of business values? [ROTATE]

Data displayed represents first ranked responses.

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Americans on which country is closest in terms of business values...



Inspecting Goods

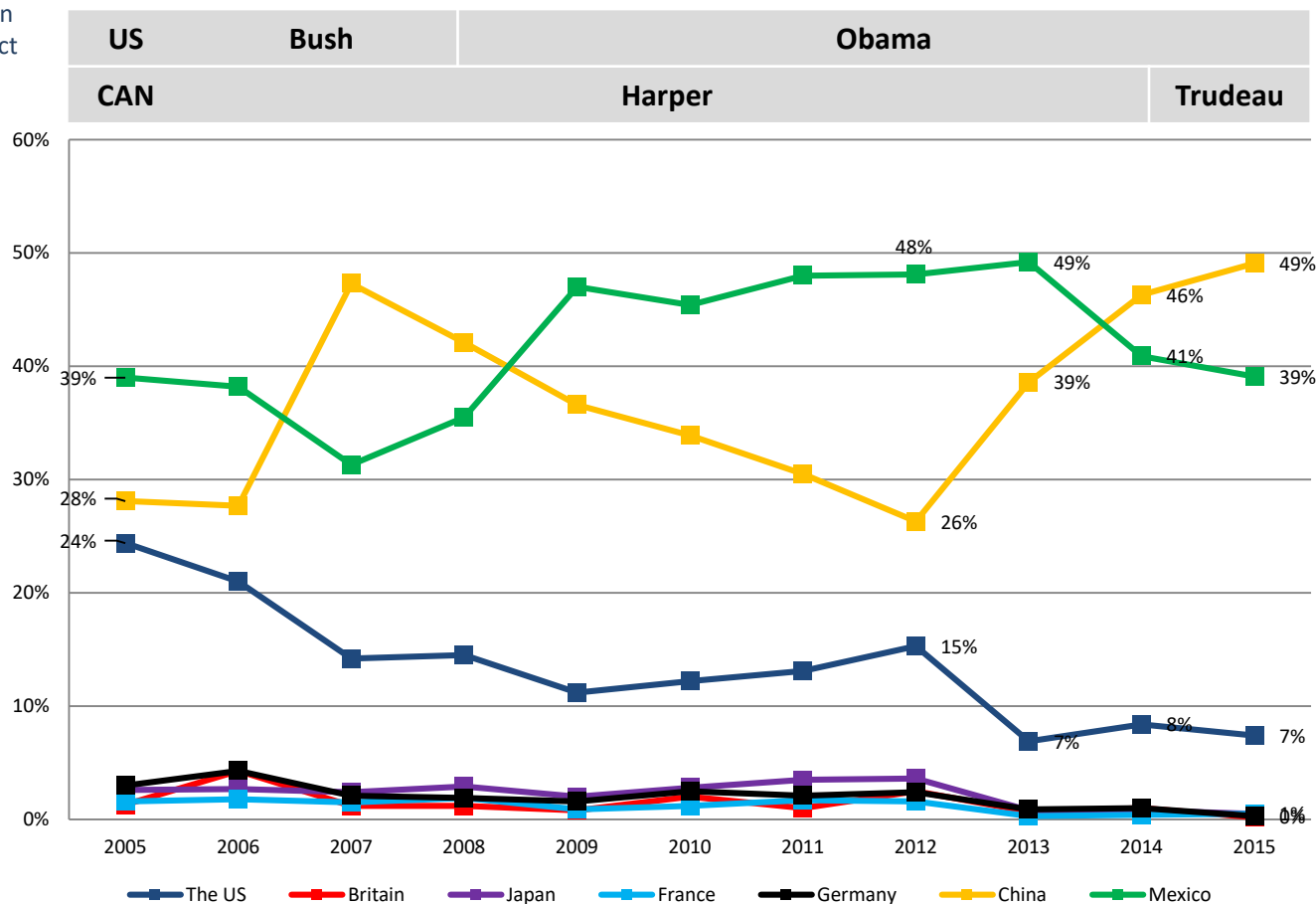
Question: Thinking about when a package or a shipping container of goods enters Canada from one of the countries below, please rank the first and second country that Canadian customs officials should thoroughly inspect the shipment. [ROTATE]

Data displayed represents first ranked responses.

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Canadians on Close Inspections of Goods from...



Inspecting Goods

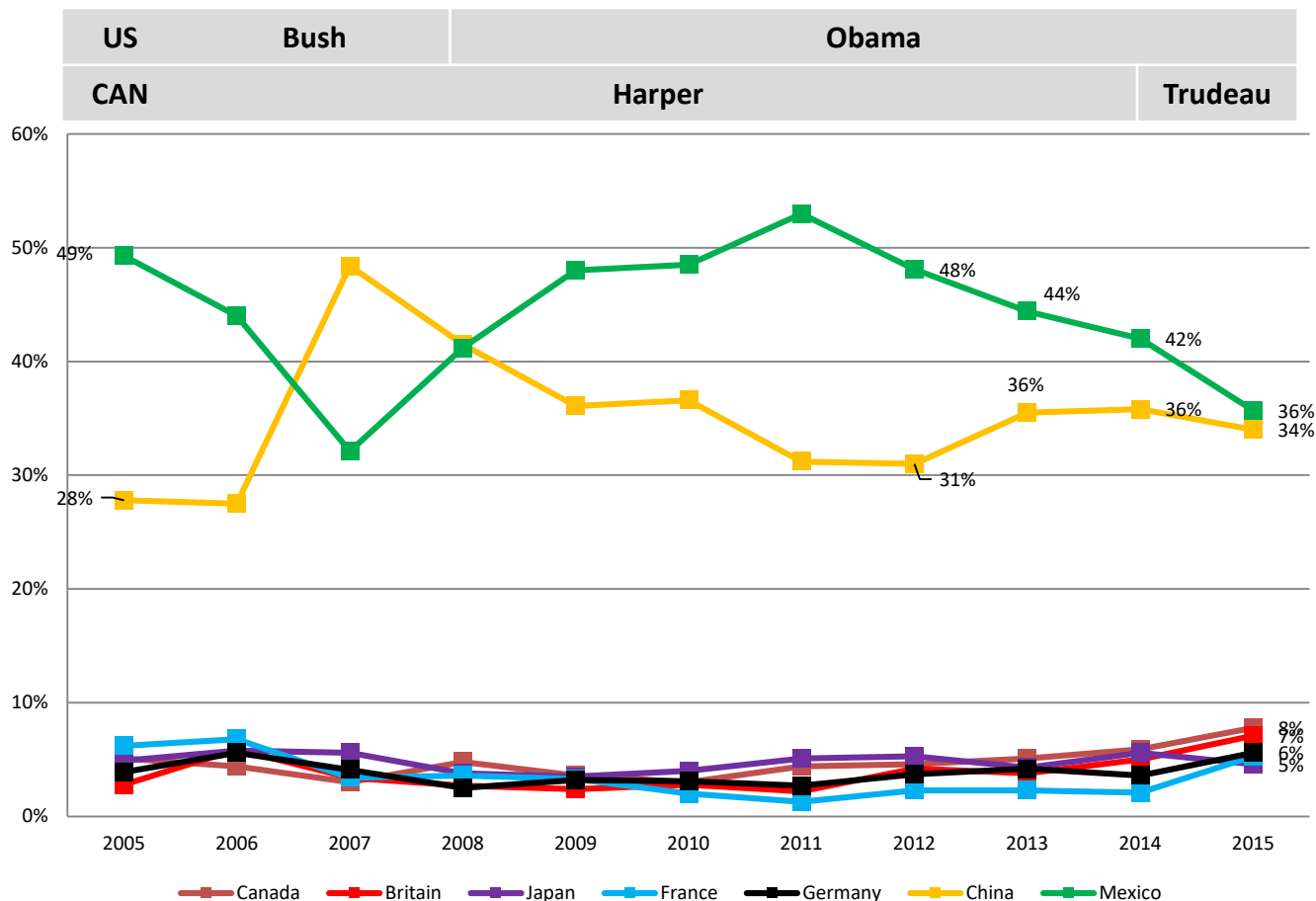
Question: Thinking about when a package or a shipping container of goods enters the United States from one of the countries below, please rank the first and second country that American customs officials should thoroughly inspect the shipment. [ROTATE]

Data displayed represents first ranked responses.

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Americans on Close Inspections of Goods from...



Questioning Visitors

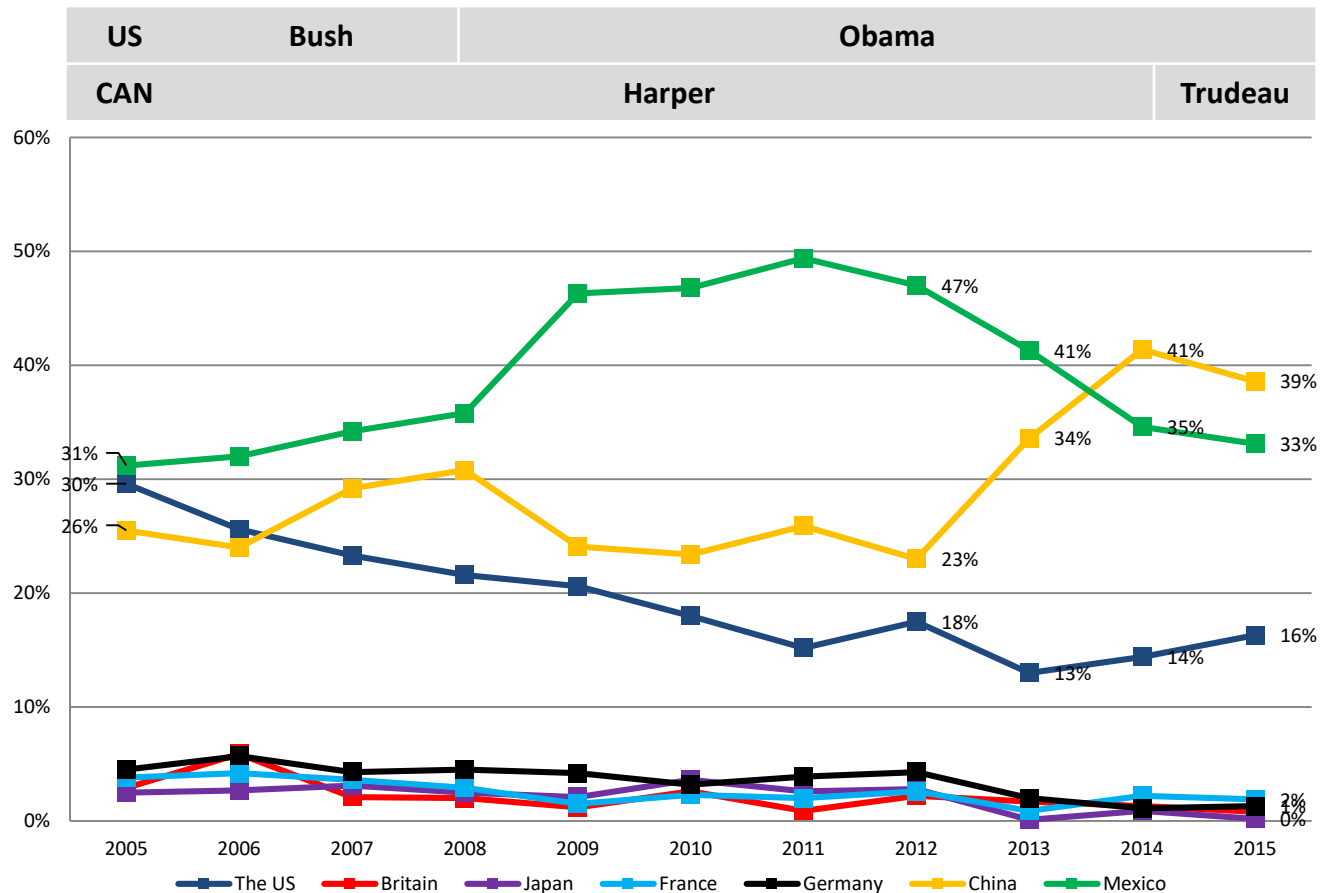
Question: Thinking about when a visitor from one of the countries below arrives at the Canadian border, please rank the first and second country whose visitors Canadian customs officials should question most thoroughly. [ROTATE]

Data displayed represents first ranked responses.

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Canadians on Questioning Visitors from...



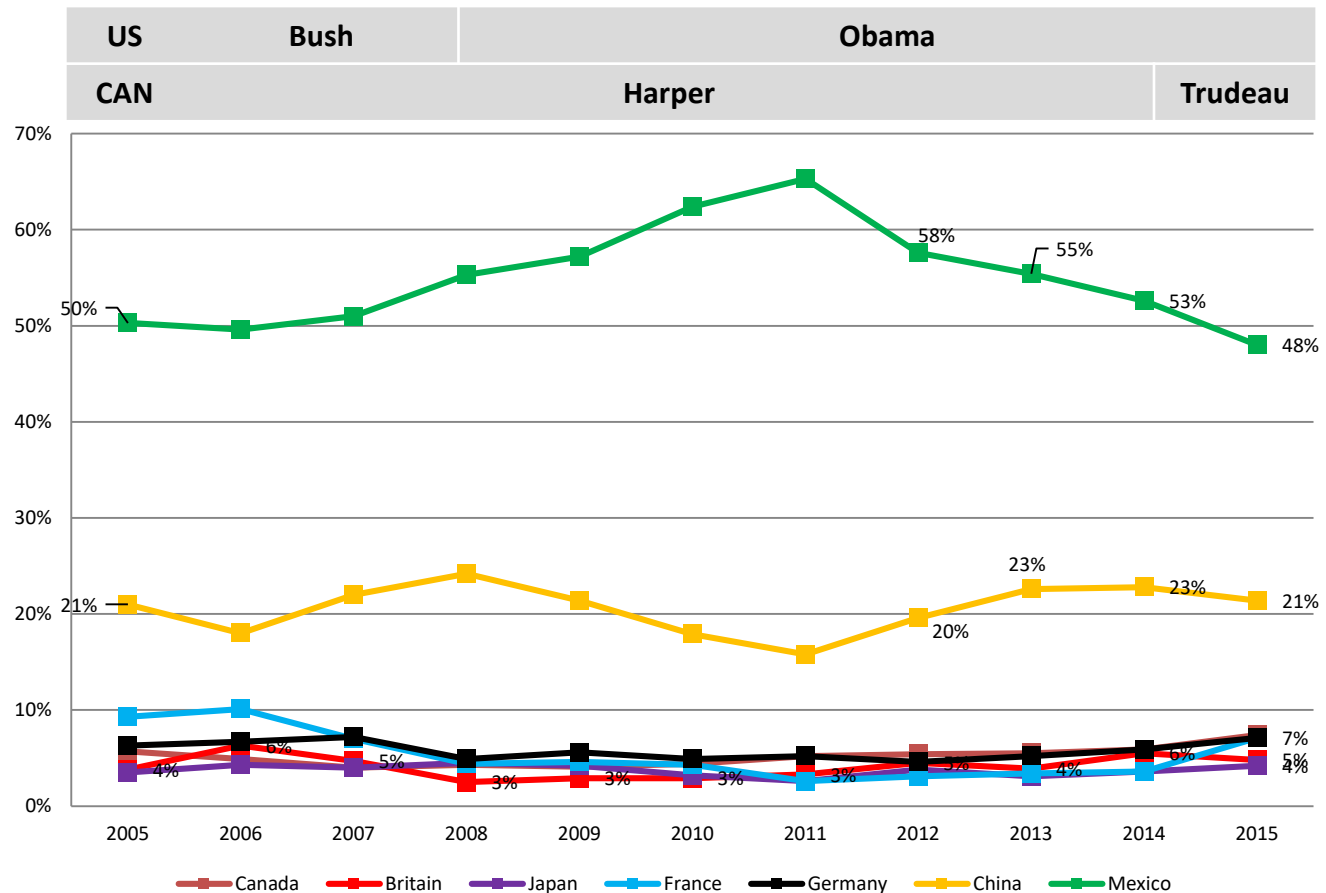
Questioning Visitors

Question: Thinking about when a visitor from one of the countries below arrives at the US border, please rank the first and second country whose visitors American customs officials should question most thoroughly. [ROTATE]

Data displayed represents first ranked responses.

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Americans on Questioning Visitors from...



National Security

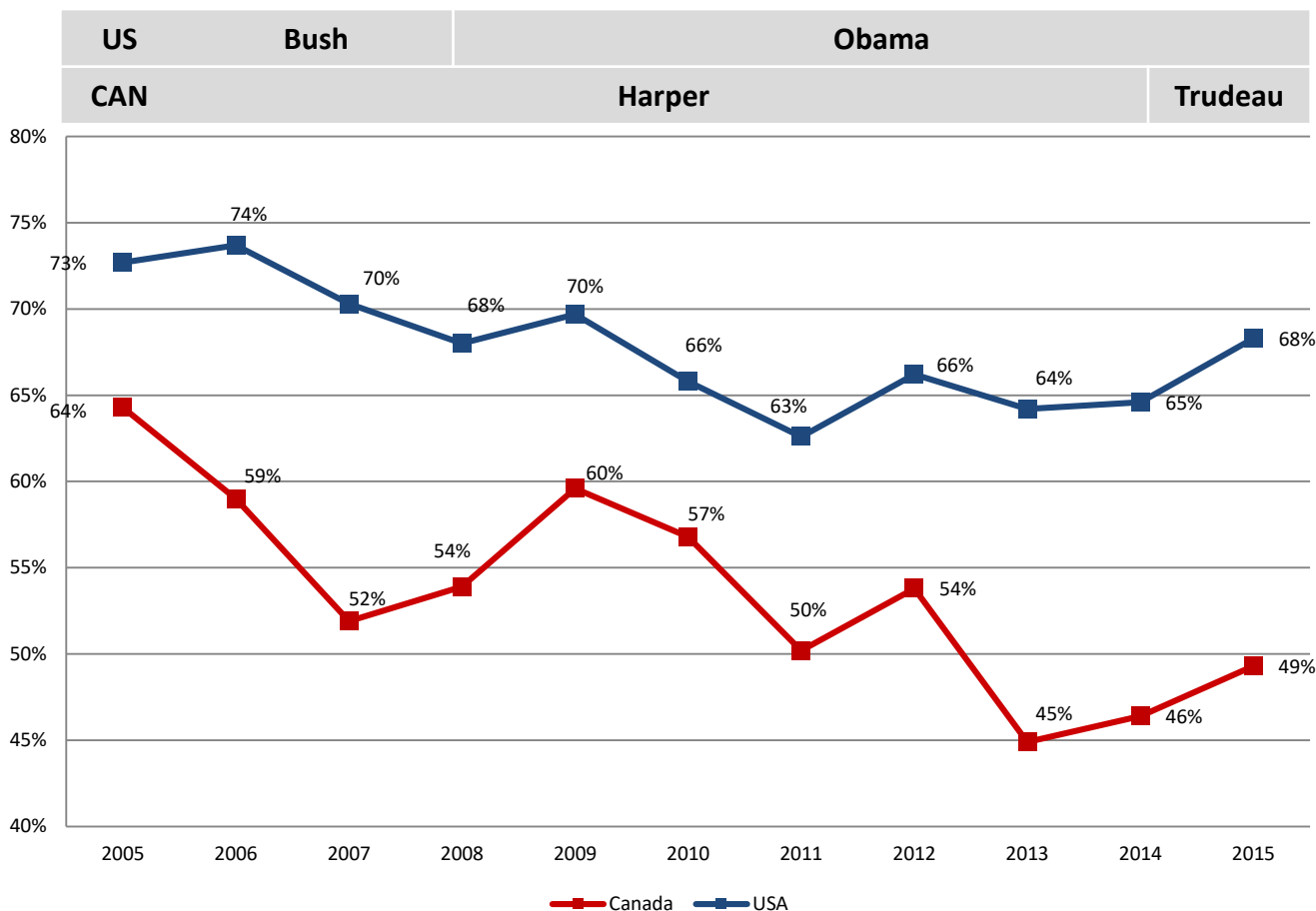
Question: In terms of national security (i.e., NATO, the United Nations), should the United States and Canada be moving towards greater and closer cooperation or should they be maintaining separate national security policies and priorities?

Data displayed represents support for much closer cooperation and somewhat closer cooperation.

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Canadians and Americans on Support for Closer Cooperation on National Security



Border Security

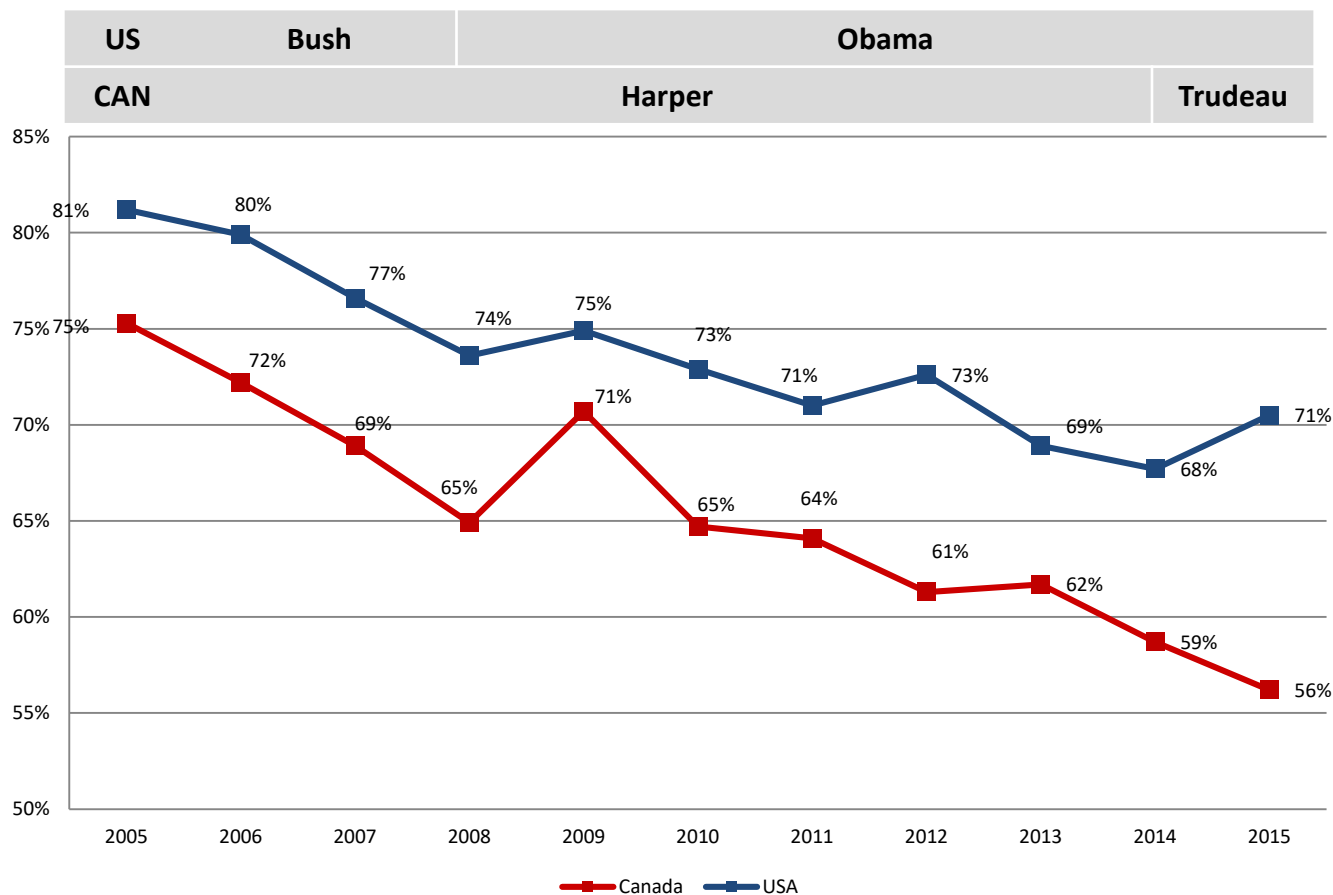
Question: In terms of border security, should the United States and Canada be moving towards greater and closer cooperation or should they be maintaining more separate policies and priorities?

Data displayed represents support for much closer cooperation and somewhat closer cooperation.

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Canadians and Americans on Support for Closer Cooperation on Border Security



Anti-Terrorism

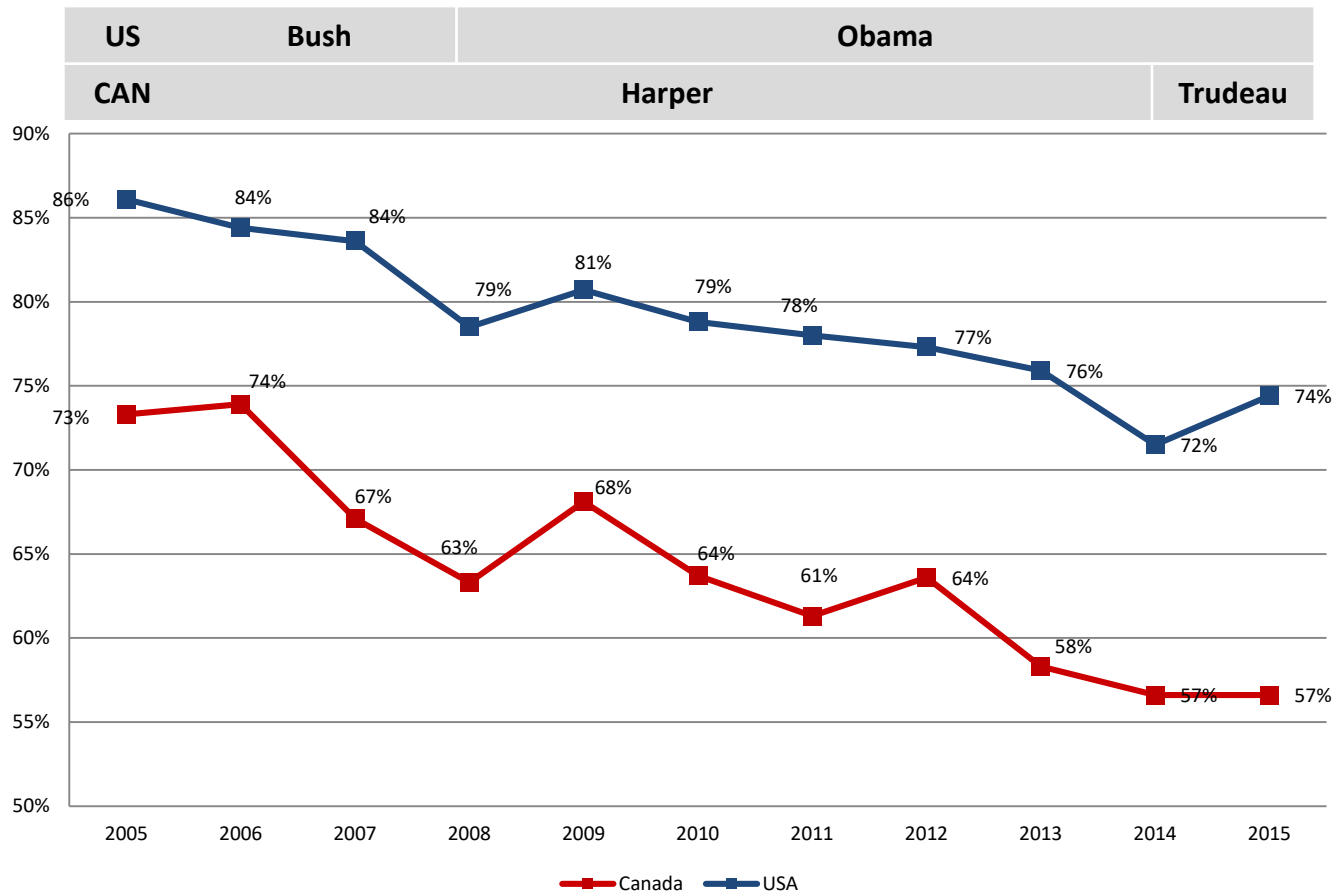
Question: In terms of anti-terrorism measures, should the United States and Canada be moving towards greater and closer cooperation or should they be maintaining more separate policies and priorities?

Data displayed represents support for much closer cooperation and somewhat closer cooperation.

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Canadians and Americans on Support for Closer Cooperation on Anti-Terrorism Measures



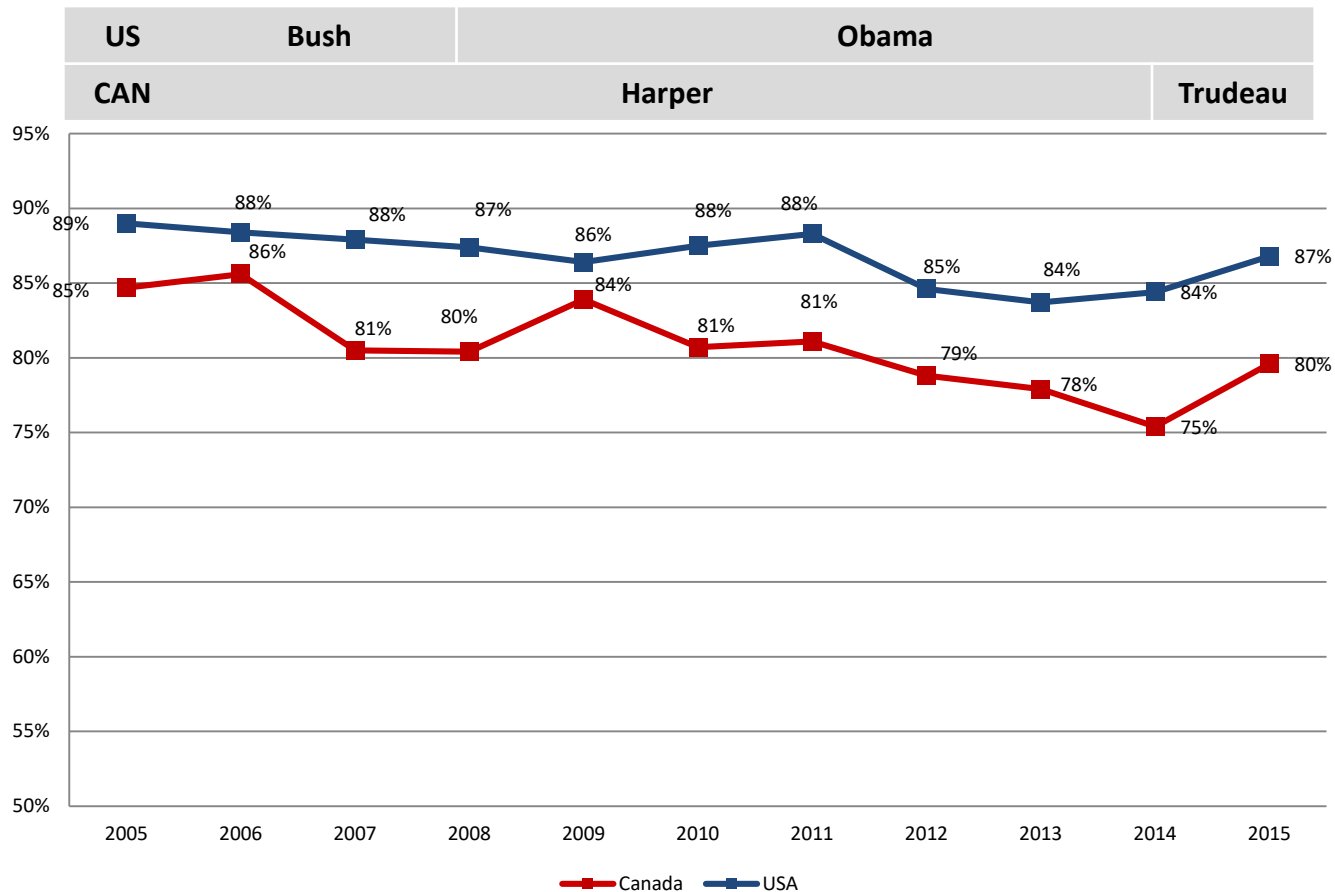
Energy Policy

Question: In your opinion, how important or unimportant is it for the United States and Canada to work together to develop an integrated energy policy to remove any dependence on Middle East oil? It is very important, somewhat important, somewhat unimportant or very unimportant?

Data displayed represents responses “very important” and “somewhat important.”

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Canadians and Americans on Importance of Developing an Integrated Energy Policy





Methodology

Methodology

The Nanos-UB North American Monitor is conducted by the Nanos Research Corporation, which is headquartered in Canada and operates both in Canada and the United States. Parallel questions on bi-national issues are tracked by means of a hybrid telephone and online random sample of Canadians in the month of August, and a random representative online sample of Americans conducted in the month of December.

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Between December 19th and 23rd, 2015, a random representative online survey of 1,000 Americans was conducted. Results were statistically checked and weighted using the latest Census data.

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



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Tabulations

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