

Canadians want an open and transparent process to select next jet fighter

Lockheed Martin Survey Summary - DRAFT

submitted by Nanos to Lockheed Martin, June 2016
(Submission 2016-871)





Having an open and competitive procurement process key

– Ability to assert Arctic sovereignty most important element in new jet

Asked to rate the importance of various possibilities related to the Canadian government's decision to acquire new jet fighters, Canadians considered selecting a fighter jet that is best at asserting sovereignty over the country's North the most important, closely followed by selecting a jet with the most advanced technology. Canadians believed having an open and transparent selection process of new fighter jets to be of highest importance, followed by having a competitive selection process. Canadians would have an overall negative impression of the Government of Canada if it sole sourced the acquisition of new jet fighters to one company without competition, and believe the country would have an overall poor value for tax dollar for that reason. A majority of Canadians believe it is urgent or somewhat urgent to select replacements of its aging fighter jets.

Important Selection Factors

- **A majority of Canadians believe selecting a jet fighter that is best at asserting sovereignty over Canada's North is extremely important** – Sixty seven percent of Canadians think selecting a fighter that is the best at asserting sovereignty over Canada's North is of high importance, while almost one in four Canadians (23%) believe it is somewhat important. Seven percent consider this not at all important and three percent are unsure.
- **Two in three Canadians think selecting a fighter with the most advanced technology is very important** – Sixty five percent of Canadians consider selecting a jet fighter that has the most advanced technology extremely important, while more than one in four Canadians (27%) believe this is somewhat important. Six percent see this as not at all important and two percent are unsure.
- **Six out of ten Canadians consider the selection of a jet fighter that has the greatest positive impact on Canadian jobs of highest importance** – Fifty eight percent of Canadians believe selecting a fighter with the greatest positive impact on jobs in Canada is extremely important, and one third (33%) see this as somewhat important. Nine percent think this is not at all important, while one percent is unsure.
- **Four out of ten Canadians believe it is important to select fighter jets that are the same as the country's allies** – Thirty nine percent of Canadians consider selecting a jet fighter that is the same as most of Canada's allies extremely important, followed by more than one third of Canadians (36%) who believe this is of average importance. One fifth of Canadians (21%) see this as not at all important, while four percent are unsure.

Views on the Procurement Process

- **One fifth of Canadians believe selecting a fighter at the lowest cost is of high importance** – Twenty percent of Canadians consider selecting fighter jets that is the lowest cost is extremely important and while more than half of Canadians (54%) see this as somewhat important. One in four Canadians (24%) consider this not at all important, and two percent are unsure.
- **A large majority of Canadians think the selection process of new fighter jets being open and transparent is extremely important** – Eight out of ten Canadians (79%) believe having an open and transparent selection process is of high importance, followed by nearly one fifth of Canadians (18%) who consider this somewhat important. Two percent see this as not at all important and one percent is unsure.
- **Seven in ten Canadians consider having a competitive selection process of new jet fighters of high importance** – Sixty nine percent of Canadians think having a competitive selection process is extremely important, while one in four (26%) see this as somewhat important. Four percent believe this is not at all important, and two percent are unsure.
- **Three out of ten Canadians believe having a selection process of fighters done as quickly as possible is extremely important** – Twenty nine percent of Canadians see having a quick selection process extremely important, compared to almost half of Canadians (49%) who think this is somewhat important. One fifth of Canadians (20%) believe this is not at all important, and two percent are unsure.
- **Majority of Canadians would have a negative or somewhat negative impression of the Government of Canada if it sole sourced the acquisition of new jets to one company** – More than eight out of ten Canadians would have a negative (53%) or somewhat negative (29%) impression of the Government of Canada if it sole sourced the acquisition of new jet fighters to one company without competition. One in ten Canadian would have a positive (three percent) or somewhat positive (eight percent) impression of the Canadian government for doing this, while seven percent are unsure.

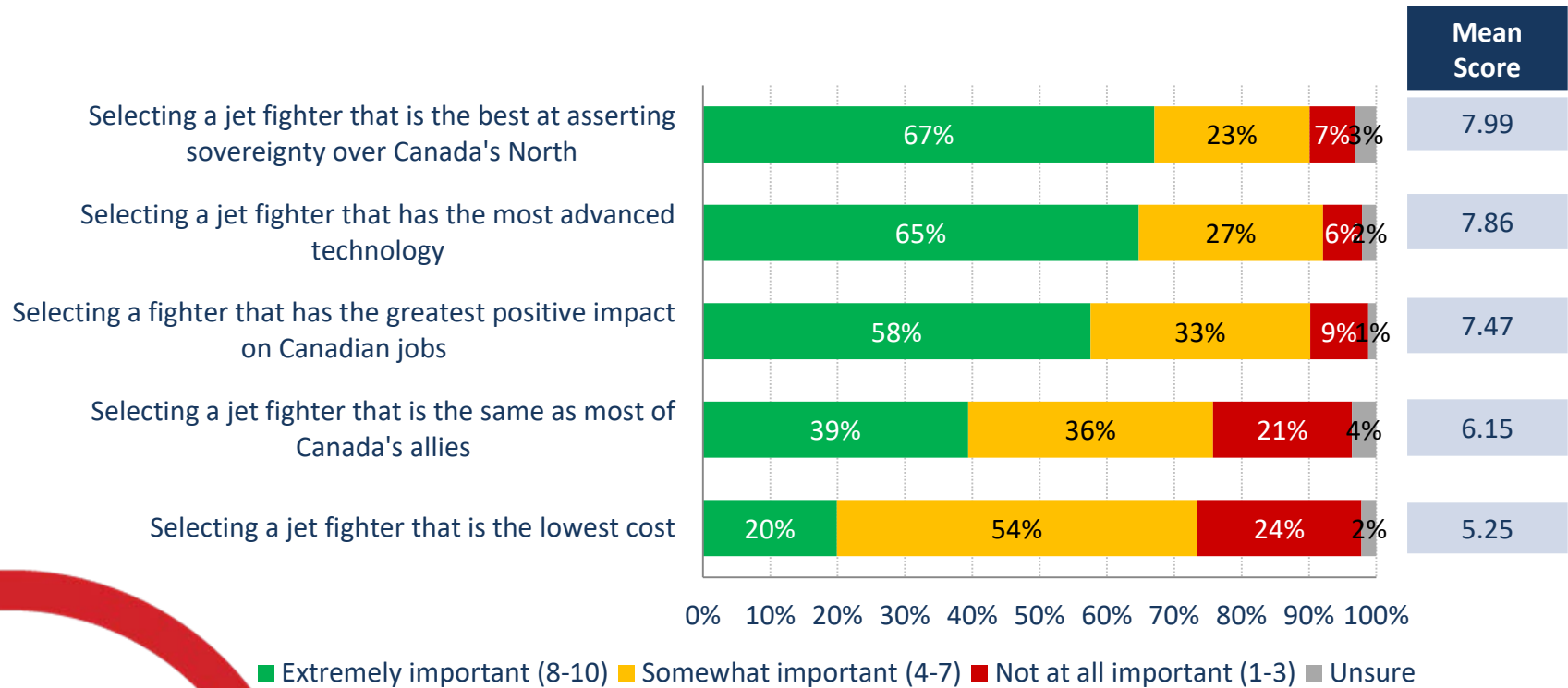
- **Six out of ten Canadians believe Canada would get poor or very poor value for tax dollars if it sole sourced the acquisition of new jets to one company** – Nearly sixty percent of Canadians think the country would get poor (30%) or very poor (29%) value for tax dollar if it sole sourced the acquisition of new fighter jets to one company without competition, while one fifth of Canadians (21%) believe Canada would get average value for tax dollars. One in ten Canadian think Canadian would get good (six percent) or very good (three percent) value for tax dollar, while eleven percent are unsure.
- **Majority of Canadians think it is urgent or somewhat urgent for the Canadian government to select a replacement for its aging jets** – Nearly two thirds of Canadians believe it urgent (16%) or somewhat urgent (47%) for the Government of Canada to select new jet fighters, while one third of Canadians think it is not urgent (14%) or somewhat not urgent (19%). Four percent are unsure.

These observations are based on a hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 26th, 2016. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada. Individuals were randomly called using random digit dialling with a maximum of five call backs. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

This study was commissioned by Lockheed Martin.

Acquiring new fighter jets

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

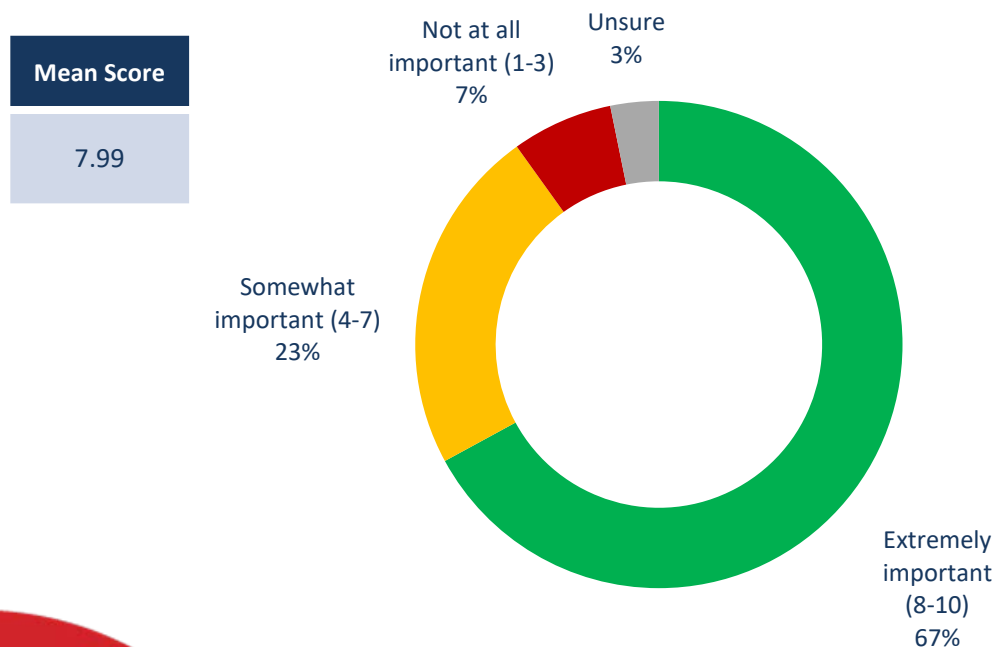


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Fighter best at asserting sovereignty over Canada's North

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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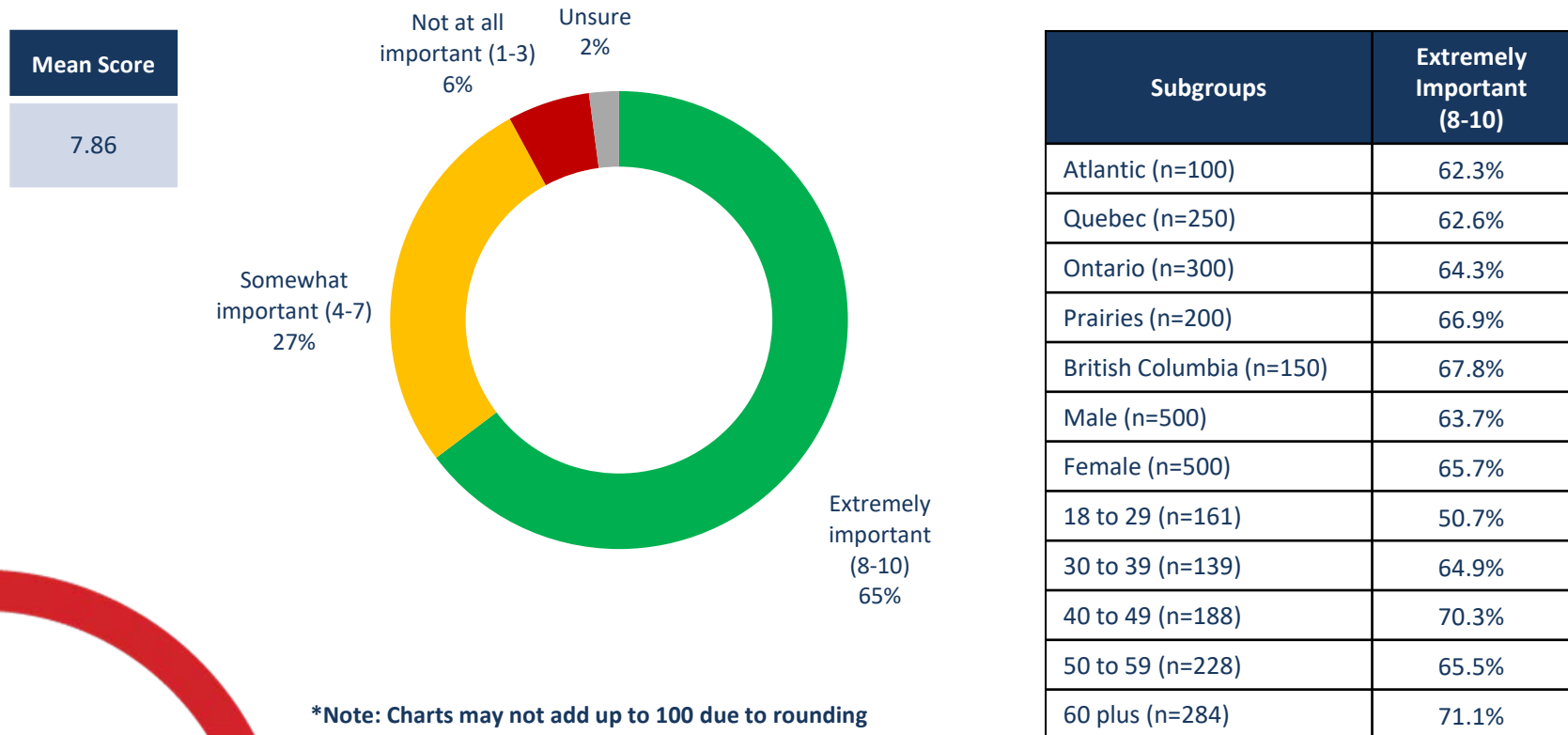
QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Selecting a jet fighter that is the best at asserting sovereignty over Canada's North

Subgroups	Extremely Important (8-10)
Atlantic (n=100)	68.5%
Quebec (n=250)	62.5%
Ontario (n=300)	68.4%
Prairies (n=200)	66.4%
British Columbia (n=150)	71.5%
Male (n=500)	71.7%
Female (n=500)	62.4%
18 to 29 (n=161)	56.7%
30 to 39 (n=139)	62.4%
40 to 49 (n=188)	68.4%
50 to 59 (n=228)	67.7%
60 plus (n=284)	77.4%

Fighter having most advanced technology

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

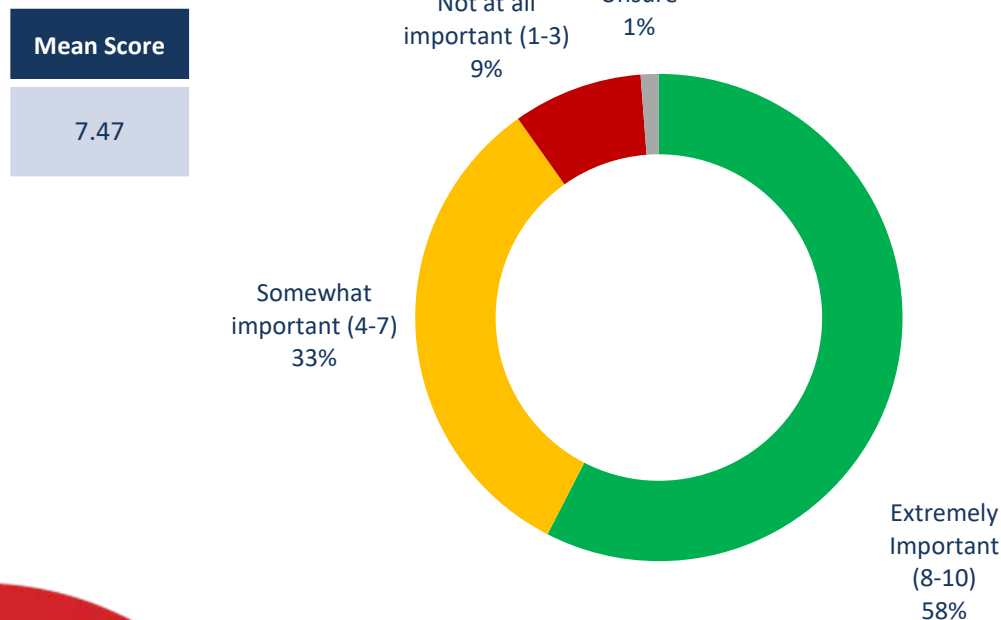


QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Selecting a jet fighter that has the most advanced technology

Fighter with positive impact on Canadian jobs

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Extremely Important (8-10)
Atlantic (n=100)	56.7%
Quebec (n=250)	68.0%
Ontario (n=300)	55.0%
Prairies (n=200)	49.5%
British Columbia (n=150)	56.2%
Male (n=500)	56.5%
Female (n=500)	58.4%
18 to 29 (n=161)	53.9%
30 to 39 (n=139)	53.2%
40 to 49 (n=188)	57.7%
50 to 59 (n=228)	63.4%
60 plus (n=284)	59.0%

***Note:** Charts may not add up to 100 due to rounding

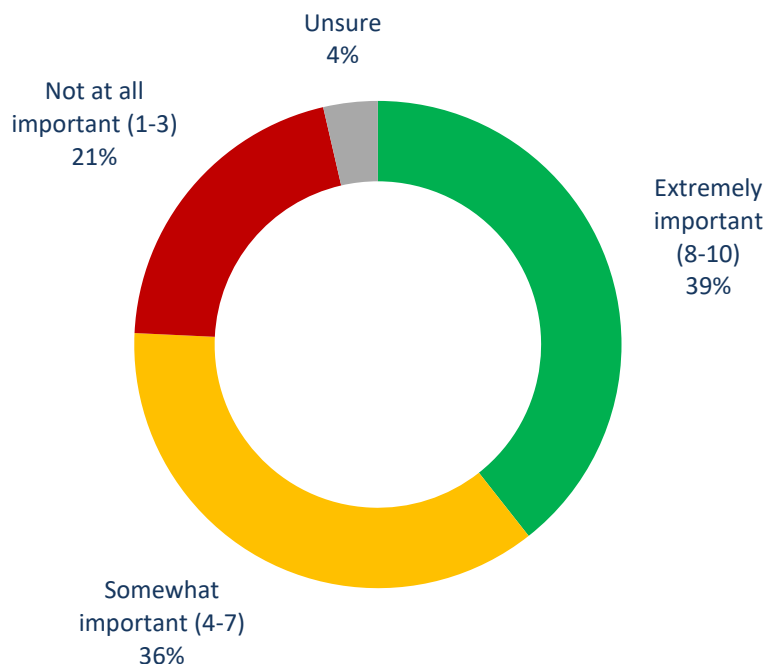
QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Selecting a fighter that has the greatest positive impact on Canadian jobs

Same fighter as Canada's allies

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Mean Score
6.15



*Note: Charts may not add up to 100 due to rounding

Subgroups	Extremely Important (8-10)
Atlantic (n=100)	49.1%
Quebec (n=250)	37.6%
Ontario (n=300)	36.7%
Prairies (n=200)	44.8%
British Columbia (n=150)	33.7%
Male (n=500)	43.6%
Female (n=500)	35.1%
18 to 29 (n=161)	27.3%
30 to 39 (n=139)	34.2%
40 to 49 (n=188)	46.4%
50 to 59 (n=228)	39.4%
60 plus (n=284)	47.0%

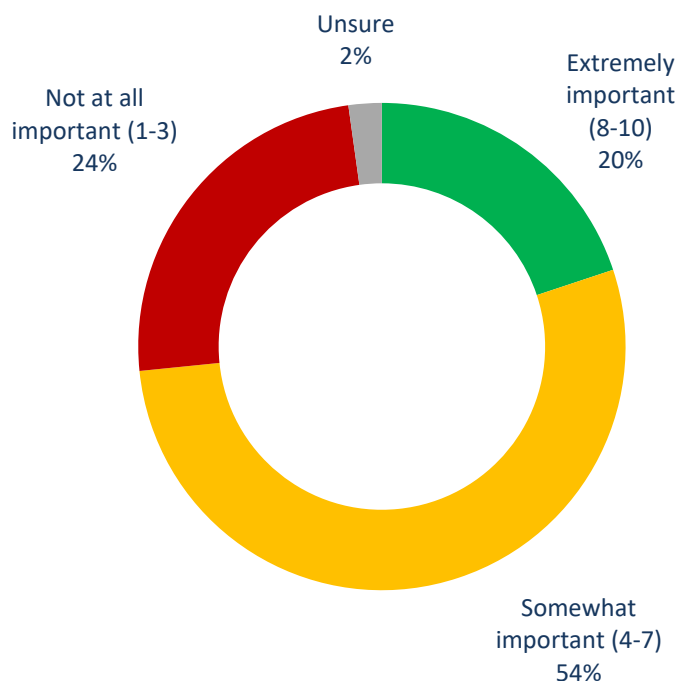
QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Selecting a jet fighter that is the same as most of Canada's allies

Fighter that is the lowest cost

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Mean Score
5.25



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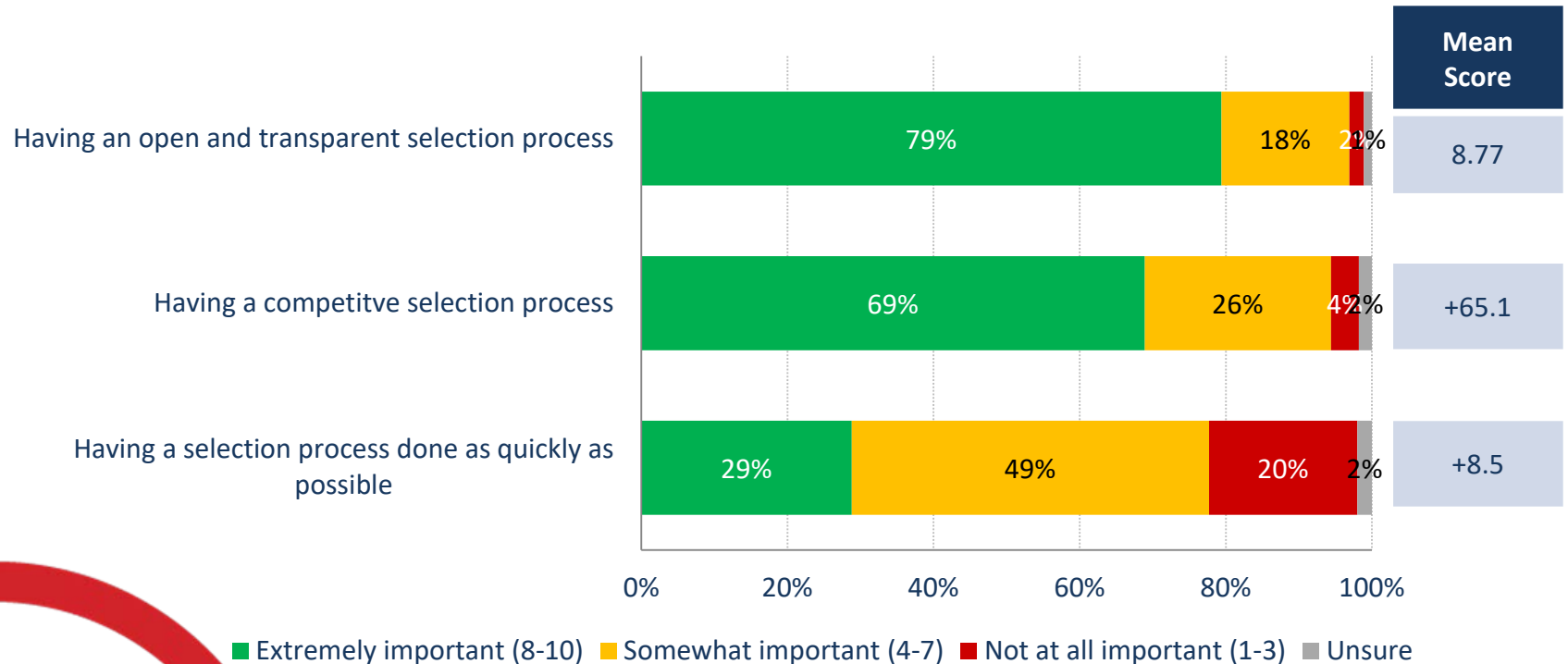
Subgroups	Extremely Important (8-10)
Atlantic (n=100)	18.0%
Quebec (n=250)	30.1%
Ontario (n=300)	16.2%
Prairies (n=200)	13.8%
British Columbia (n=150)	20.1%
Male (n=500)	20.5%
Female (n=500)	19.2%
18 to 29 (n=161)	22.9%
30 to 39 (n=139)	17.8%
40 to 49 (n=188)	19.7%
50 to 59 (n=228)	19.6%
60 plus (n=284)	19.3%

QUESTION – Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important. [RANDOMIZE Q1 to Q5]

Selecting a jet fighter that is the lowest cost

New jet fighters selection process

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



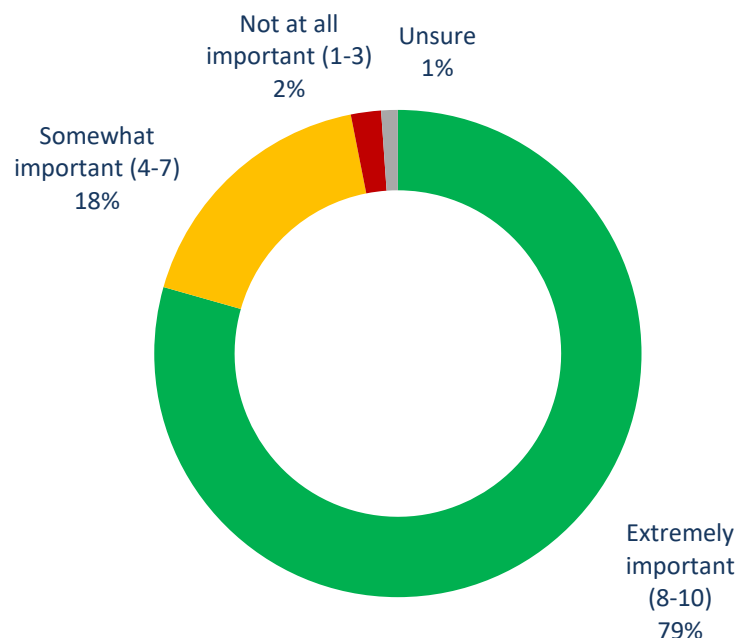
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important [ROTATE Q6 to Q8]

Open and transparent selection process

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+77.4



Subgroups	Extremely Important (8-10)
Atlantic (n=100)	79.3%
Quebec (n=250)	87.4%
Ontario (n=300)	81.2%
Prairies (n=200)	72.4%
British Columbia (n=150)	71.6%
Male (n=500)	76.2%
Female (n=500)	82.6%
18 to 29 (n=161)	73.4%
30 to 39 (n=139)	76.1%
40 to 49 (n=188)	81.7%
50 to 59 (n=228)	81.0%
60 plus (n=284)	83.7%

*Note: Charts may not add up to 100 due to rounding

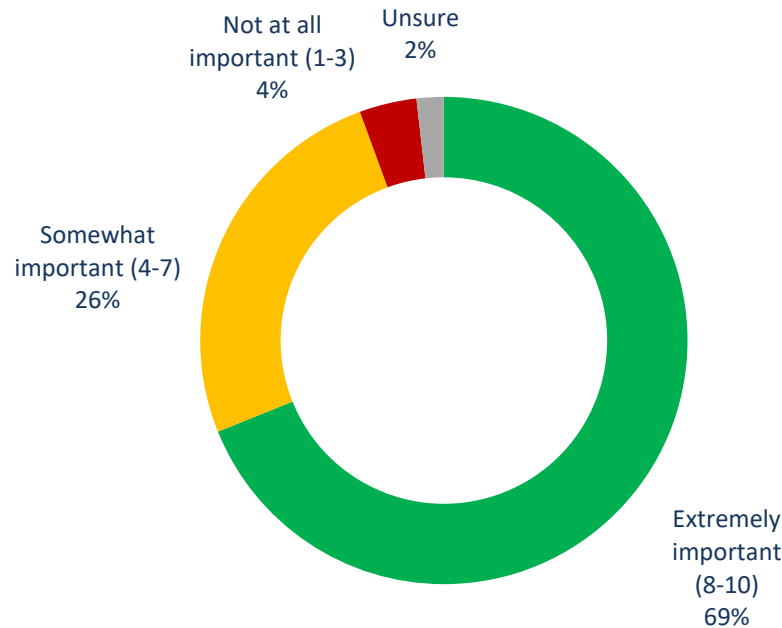
QUESTION – Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important [ROTATE Q6 to Q8]

Having an open and transparent selection process

Competitive selection process

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+65.1



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QUESTION – Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important [ROTATE Q6 to Q8]

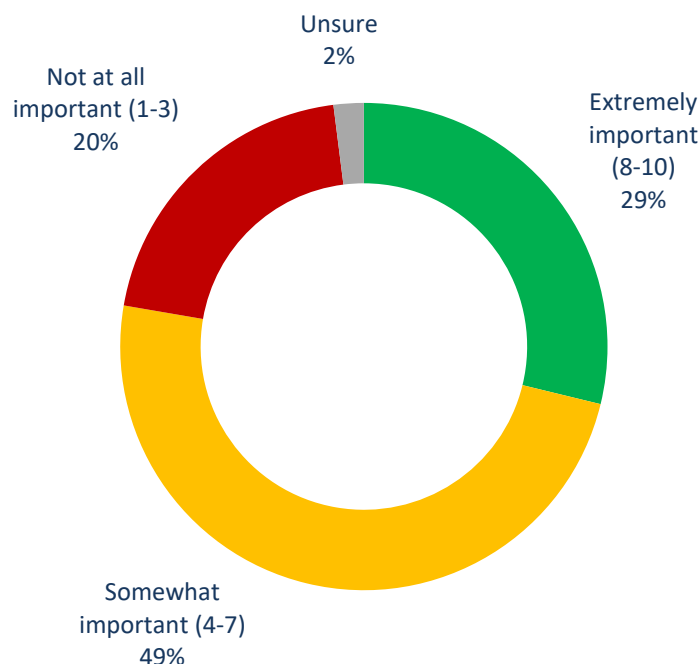
Having a competitive selection process

Subgroups	Extremely Important (8-10)
Atlantic (n=100)	63.8%
Quebec (n=250)	71.9%
Ontario (n=300)	72.1%
Prairies (n=200)	63.1%
British Columbia (n=150)	69.2%
Male (n=500)	67.6%
Female (n=500)	70.4%
18 to 29 (n=161)	57.3%
30 to 39 (n=139)	64.7%
40 to 49 (n=188)	72.4%
50 to 59 (n=228)	74.0%
60 plus (n=284)	75.0%

Selection process done as quickly as possible

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+8.5



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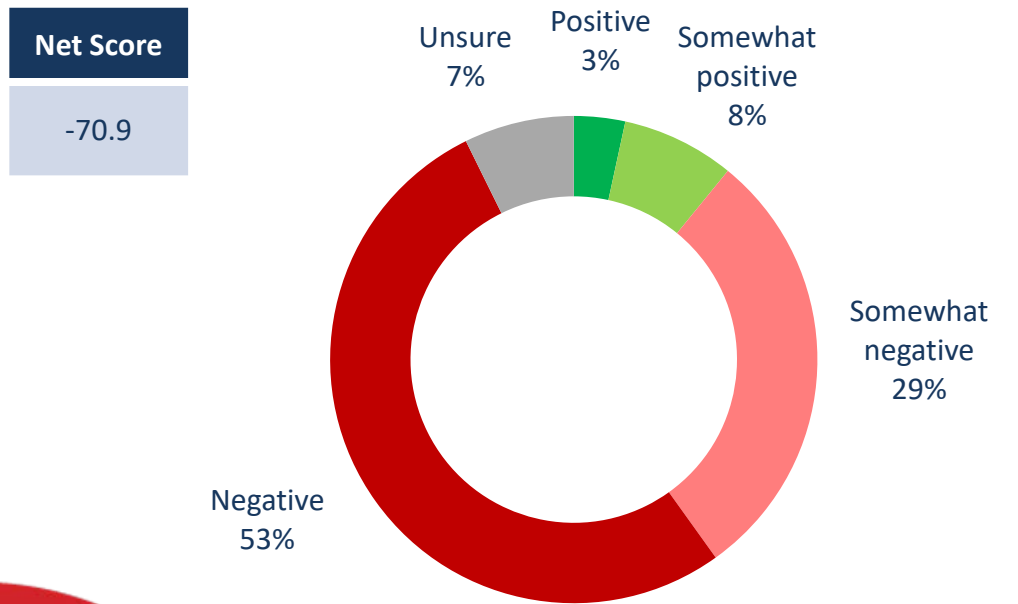
Subgroups	Extremely Important (8-10)
Atlantic (n=100)	34.8%
Quebec (n=250)	25.9%
Ontario (n=300)	29.4%
Prairies (n=200)	30.0%
British Columbia (n=150)	26.7%
Male (n=500)	29.0%
Female (n=500)	28.6%
18 to 29 (n=161)	17.3%
30 to 39 (n=139)	22.8%
40 to 49 (n=188)	34.1%
50 to 59 (n=228)	29.9%
60 plus (n=284)	37.4%

QUESTION – Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important [ROTATE Q6 to Q8]

Having a selection process done as quickly as possible

Sourcing fighter acquisition without competition

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

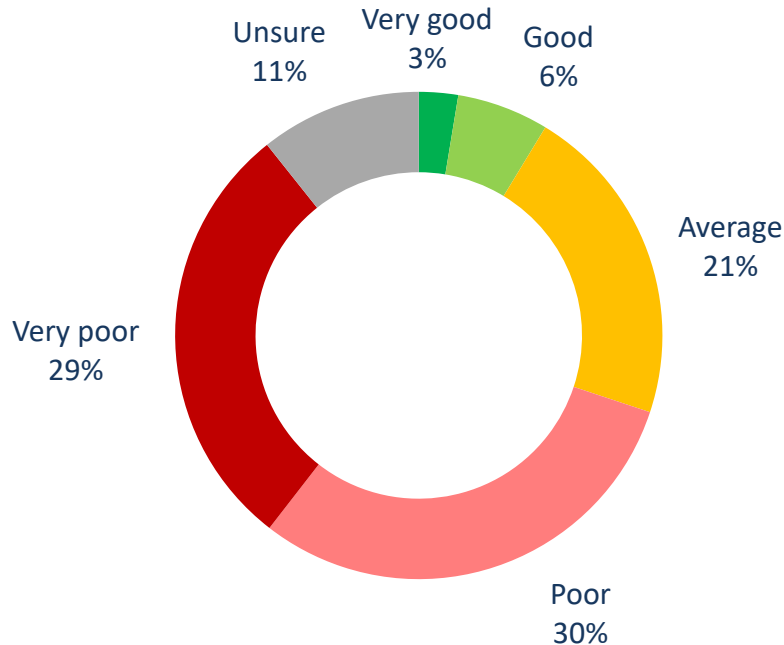
Subgroups	Positive/ somewhat positive
Atlantic (n=100)	13.9%
Quebec (n=250)	12.9%
Ontario (n=300)	8.7%
Prairies (n=200)	12.4%
British Columbia (n=150)	7.9%
Male (n=500)	14.0%
Female (n=500)	7.8%
18 to 29 (n=161)	9.7%
30 to 39 (n=139)	15.2%
40 to 49 (n=188)	10.1%
50 to 59 (n=228)	9.1%
60 plus (n=284)	10.8%

QUESTION – Would you have a positive, somewhat positive, somewhat negative or negative impression of the Government of Canada if it sole sourced the acquisition of new jet fighters to one company without competition?

Value for tax dollars if no competition for acquisition

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
-50.5



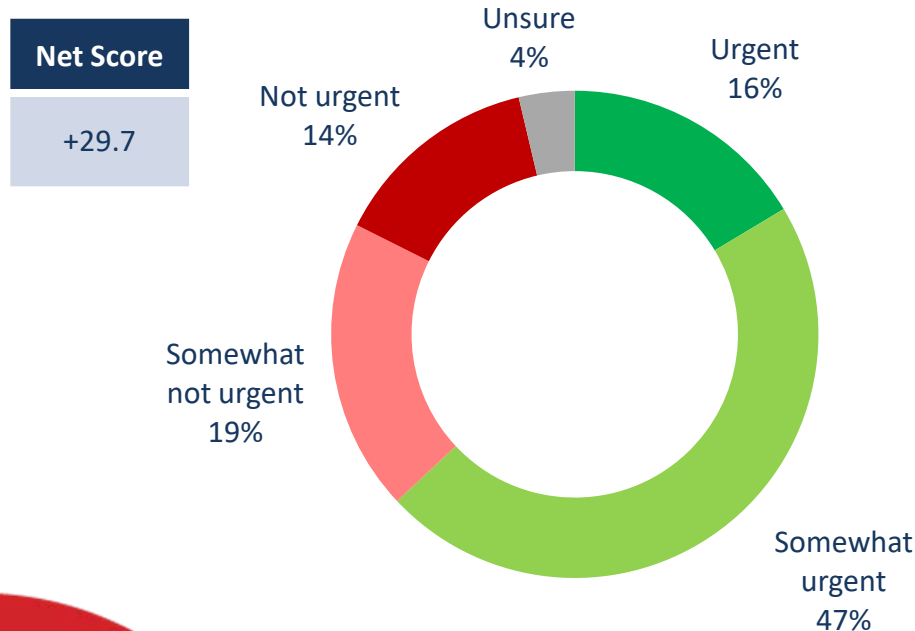
***Note: Charts may not add up to 100 due to rounding**

Subgroups	Very good/ good
Atlantic (n=100)	12.4%
Quebec (n=250)	10.7%
Ontario (n=300)	6.8%
Prairies (n=200)	8.3%
British Columbia (n=150)	7.5%
Male (n=500)	10.8%
Female (n=500)	6.6%
18 to 29 (n=161)	7.8%
30 to 39 (n=139)	9.9%
40 to 49 (n=188)	7.4%
50 to 59 (n=228)	7.0%
60 plus (n=284)	10.9%

QUESTION – Do you think Canada would get very good, good, average, poor, or very poor value for tax dollars if it sole sourced the acquisition of new jet fighters to one company without competition?

Urgency of selecting replacement for aging fighters

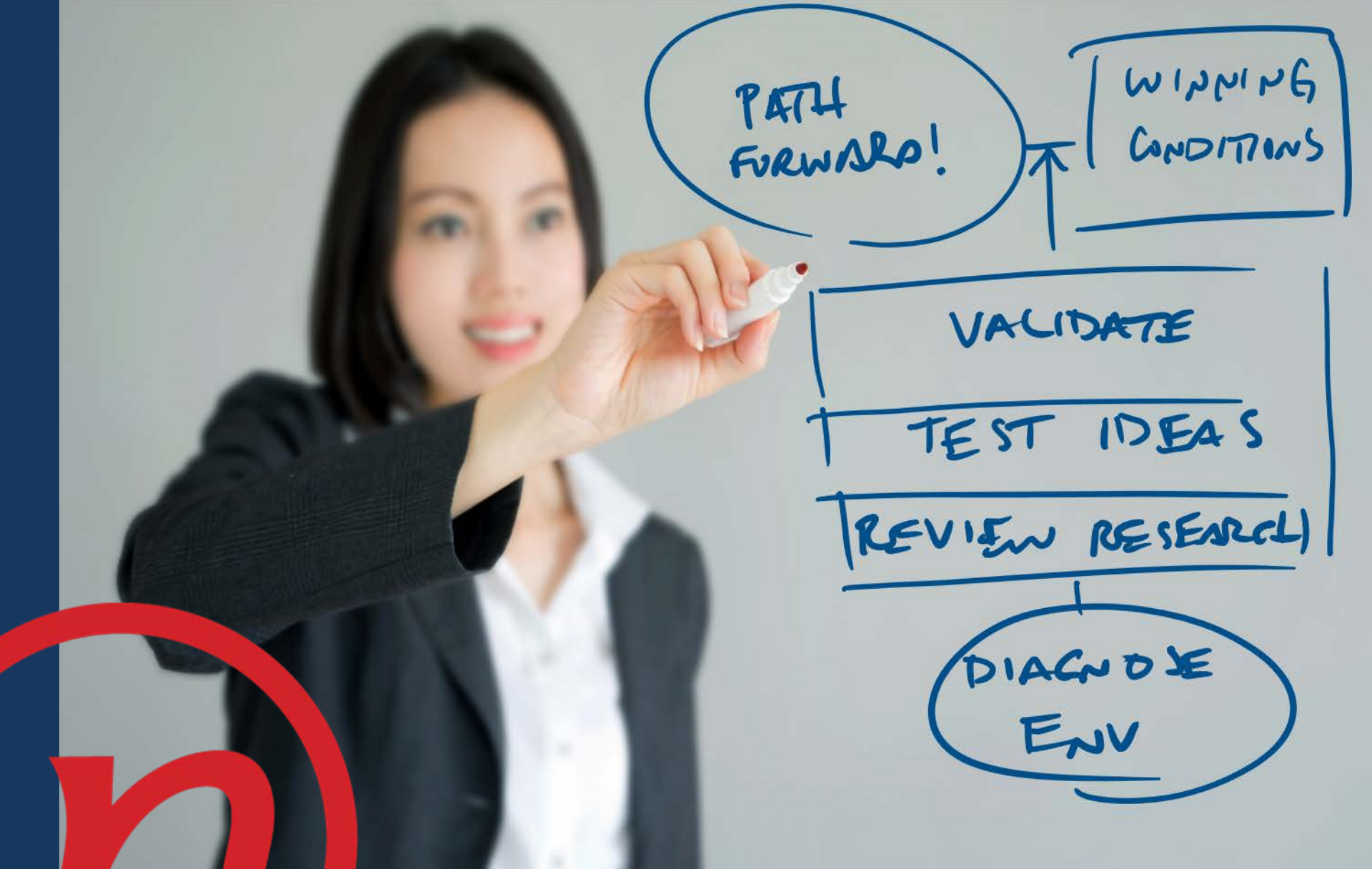
Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 26th, 2016, n=1,000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



***Note: Charts may not add up to 100 due to rounding**

Subgroups	Urgent/ somewhat urgent
Atlantic (n=100)	74.3%
Quebec (n=250)	45.8%
Ontario (n=300)	65.8%
Prairies (n=200)	70.9%
British Columbia (n=150)	67.7%
Male (n=500)	66.0%
Female (n=500)	60.1%
18 to 29 (n=161)	51.1%
30 to 39 (n=139)	64.0%
40 to 49 (n=188)	65.8%
50 to 59 (n=228)	63.6%
60 plus (n=284)	69.5%

QUESTION – Would you say from a time perspective, it is urgent, somewhat urgent, somewhat not urgent or not urgent for the Government of Canada to select a replacement for its aging jet fighters?



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 26th, 2016. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Lockheed Martin.

Note: Charts may not add up to 100 due to rounding.



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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Nik Nanos FMRIA

Chairman, Nanos Research Group
Ottawa (613) 234-4666 ext. 237
Washington DC (202) 697-9924
nnanos@nanosresearch.com

Richard Jenkins

Vice President, Nanos Research
Ottawa (613) 234-4666 ext. 230
rjenkins@nanosresearch.com

Technical Note

Element	Description
Organization who commissioned the research	Lockheed Martin
Final Sample Size	1000 Randomly selected individuals.
Margin of Error	±3.1 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct
Number of Calls	Maximum of five call backs.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	June 24 th to 26 th , 2016.
Language of Survey	The survey was conducted in both English and French.

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Estimated Response Rate	Fourteen percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	All questions asked are contained in the report.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Survey Company	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.



Tabulations

Confidential



2016-871 – LOCKHEED MARTIN CANADA - STAT SHEET

Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important.
[Randomize Questions 1 to 5]

			Region							Gender		Age				
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question 1 – Selecting a fighter that has the greatest positive impact on Canadian jobs	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284	
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239	
		Mean	7.47	7.61	7.88	7.28	7.04	7.66	7.35	7.60	7.27	7.25	7.54	7.64	7.62	
	Not at all important(1)	%	4.7	2.8	5.8	5.7	5.0	1.9	5.8	3.7	7.5	6.9	4.3	2.7	2.7	
	2	%	1.0	2.3	1.4	.5	.7	1.3	.7	1.4	.0	1.4	.5	2.8	.8	
	3	%	2.9	2.0	1.7	3.7	5.1	1.2	3.3	2.6	5.1	2.4	1.0	2.8	3.3	
	4	%	2.1	1.2	.9	3.9	2.1	1.0	3.1	1.1	3.2	2.9	1.1	1.9	1.6	
	5	%	9.2	11.1	7.0	7.3	12.0	11.9	7.9	10.5	6.2	7.2	11.7	10.2	10.4	
	6	%	9.1	7.6	5.4	9.4	11.3	12.8	9.4	8.8	14.0	8.6	8.8	4.4	9.0	
	7	%	12.2	13.8	8.8	13.8	13.3	12.5	12.3	12.2	9.0	16.0	13.2	11.3	12.2	
	8	%	16.9	16.4	15.4	19.1	16.7	15.7	17.5	16.2	13.6	14.4	19.2	21.2	16.3	
	9	%	13.0	8.1	15.6	12.1	15.8	9.8	14.0	11.9	6.9	16.1	14.2	12.6	15.1	
	Extremely important(10)	%	27.6	32.2	37.0	23.8	17.0	30.7	25.0	30.3	33.4	22.7	24.3	29.6	27.6	
	Unsure	%	1.2	2.4	1.0	.8	1.2	1.3	1.0	1.3	1.2	1.5	1.7	.5	1.0	

Nanos conducted a national RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 26th, 2016. The margin of error for a random survey of 1,000 Canadians is 3.1 percentage points, 19 times out of 20.

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2016-871 – LOCKHEED MARTIN CANADA - STAT SHEET

Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important.
[Randomize Questions 1 to 5]

			Region					Gender		Age					
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 2 – Selecting a jet fighter that is the best at asserting sovereignty over Canada's North	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	7.99	8.11	7.68	8.03	8.04	8.28	8.16	7.81	7.39	7.74	8.07	8.03	8.55
	Not at all important(1)	%	3.7	2.8	7.3	3.0	2.4	1.3	4.5	2.8	7.4	3.4	2.7	4.8	.7
	2	%	.9	1.0	.7	1.3	1.0	.5	.5	1.3	.0	1.9	1.1	.9	.8
	3	%	2.1	2.0	1.3	2.2	3.2	2.2	.8	3.5	3.3	3.3	1.5	.5	2.2
	4	%	1.9	.9	3.6	1.0	1.5	1.8	1.2	2.5	2.7	1.1	2.5	2.3	.8
	5	%	5.3	6.4	4.8	5.7	5.9	3.7	4.1	6.5	6.9	5.3	6.9	3.5	3.8
	6	%	5.9	8.5	5.5	5.3	6.2	5.9	5.4	6.5	7.1	6.1	5.3	6.7	4.9
	7	%	9.9	6.7	11.2	9.5	11.9	8.2	10.6	9.2	10.1	12.1	9.4	11.8	7.3
	8	%	16.6	14.2	14.1	19.8	13.0	20.5	17.5	15.7	18.7	21.9	14.5	15.4	13.6
	9	%	14.8	15.7	15.1	13.4	16.4	14.4	14.7	14.9	9.1	9.8	16.6	15.7	21.0
	Extremely important(10)	%	35.6	38.6	33.3	35.2	37.0	36.6	39.5	31.8	28.9	30.7	37.3	36.6	42.8
	Unsure	%	3.2	3.2	3.1	3.6	1.4	4.8	1.1	5.3	5.9	4.5	2.1	1.8	1.8

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Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important.
[Randomize Questions 1 to 5]

			Region					Gender		Age					
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 3 – Selecting a jet fighter that has the most advanced technology	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	7.86	7.77	7.78	7.78	7.97	8.06	7.77	7.94	7.15	7.96	8.19	7.96	8.01
	Not at all important(1)	%	2.9	2.0	4.4	3.3	1.7	2.1	3.4	2.5	5.2	2.9	2.0	2.2	2.4
	2	%	.9	3.0	.8	.7	.8	.5	.8	1.0	1.9	1.6	.0	.0	1.1
	3	%	2.0	3.3	.8	2.7	1.5	2.3	2.3	1.7	3.4	.6	.6	2.1	2.9
	4	%	1.9	2.2	1.6	2.1	2.7	.7	2.1	1.7	3.3	.8	1.7	2.1	1.6
	5	%	6.4	3.8	6.9	7.2	6.2	6.3	5.7	7.1	8.7	7.0	3.6	6.7	6.4
	6	%	5.8	3.7	6.0	6.9	5.1	5.8	6.4	5.2	9.0	2.2	6.9	5.1	5.2
	7	%	13.2	18.0	15.4	10.0	12.4	13.8	13.9	12.5	14.9	17.0	12.7	14.9	8.3
	8	%	20.1	19.4	20.2	19.2	22.3	19.5	20.6	19.7	17.1	21.5	21.5	19.9	20.8
	9	%	15.2	14.5	13.3	16.7	16.4	14.6	15.7	14.7	12.1	12.2	18.1	15.2	17.6
	Extremely important(10)	%	29.3	28.4	29.1	28.4	28.2	33.7	27.4	31.3	21.5	31.2	30.7	30.4	32.7
	Unsure	%	2.1	1.7	1.5	2.8	2.9	.8	1.6	2.6	2.9	3.1	2.2	1.4	1.0

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Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important.
[Randomize Questions 1 to 5]

			Region						Gender		Age				
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 4 – Selecting a jet fighter that is the same as most of Canada's allies	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	6.15	6.59	5.83	6.17	6.41	5.99	6.37	5.92	5.05	5.92	6.51	6.28	6.84
	Not at all important(1)	%	13.3	7.8	17.5	12.1	14.4	11.1	12.2	14.5	26.7	14.9	8.6	11.5	6.2
	2	%	2.8	3.6	3.4	2.1	2.4	3.6	2.2	3.5	1.2	1.6	3.9	4.0	3.3
	3	%	4.5	3.8	4.7	4.9	2.0	7.5	4.2	4.9	7.1	5.2	5.4	2.6	2.6
	4	%	4.4	5.0	1.9	6.7	4.5	3.6	4.4	4.4	3.8	5.2	5.5	2.9	4.5
	5	%	10.9	12.3	11.6	9.5	10.3	12.4	10.3	11.5	12.5	12.1	9.2	12.3	9.1
	6	%	9.3	8.2	10.6	9.2	7.9	10.0	9.6	9.1	8.6	8.3	7.9	9.0	12.1
	7	%	11.7	8.5	7.8	15.2	12.2	12.7	11.4	12.0	9.5	13.1	11.0	13.9	11.7
	8	%	16.7	21.3	19.2	15.3	15.6	13.7	18.3	15.1	12.3	15.0	18.7	17.7	19.2
	9	%	10.0	17.4	5.9	9.6	13.1	8.9	11.3	8.8	6.8	8.2	14.8	10.2	9.8
	Extremely important(10)	%	12.6	10.4	12.5	11.8	16.1	11.1	14.0	11.2	8.2	11.0	12.9	11.5	18.0
	Unsure	%	3.6	1.7	4.9	3.8	1.5	5.4	2.2	5.1	3.4	5.4	2.1	4.3	3.5

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Thinking about the decision to acquire new fighter jets, please rate the importance of each of the following where 1 is not at all important and 10 is extremely important.
[Randomize Questions 1 to 5]

			Region						Gender		Age				
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question5 – Selecting a jet fighter that is the lowest cost	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	5.25	5.29	5.86	5.00	4.85	5.24	5.22	5.28	5.25	5.34	5.36	5.11	5.19
	Not at all important(1)	%	9.2	8.8	8.0	9.9	9.8	9.5	9.8	8.7	12.8	6.9	7.9	9.1	9.1
	2	%	5.7	2.7	4.4	6.5	6.5	7.0	6.2	5.1	5.6	6.0	4.7	7.3	5.2
	3	%	9.5	11.1	4.7	11.6	13.8	6.6	10.8	8.2	8.8	8.3	9.9	10.4	9.8
	4	%	11.5	16.6	11.7	11.1	11.4	8.9	11.0	12.0	11.3	12.1	10.8	9.6	13.3
	5	%	21.9	18.7	19.2	23.0	22.4	25.8	20.6	23.2	17.5	21.7	23.7	26.8	20.7
	6	%	10.7	9.4	10.2	10.8	12.8	9.5	8.9	12.5	10.0	11.7	10.9	9.2	11.5
	7	%	9.4	13.1	10.0	8.5	8.4	9.0	10.3	8.4	9.1	13.1	9.2	6.3	9.4
	8	%	7.6	5.4	10.6	5.6	5.7	10.9	7.8	7.4	8.3	7.3	6.3	7.4	8.6
	9	%	4.9	4.1	8.6	4.0	4.4	1.6	4.9	4.8	4.2	5.1	3.7	5.1	6.1
	Extremely important(10)	%	7.4	8.5	10.9	6.6	3.7	7.6	7.8	7.0	10.4	5.4	9.7	7.1	4.6
	Unsure	%	2.2	1.7	1.9	2.5	1.3	3.4	1.7	2.6	2.0	2.3	3.2	1.7	1.6

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Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important
[Randomize Questions 6 to 8]

			Region							Gender		Age				
			Canada 2016–06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question 6 – Having an open and transparent selection process	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284	
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239	
		Mean	8.77	8.71	9.20	8.78	8.35	8.60	8.55	8.98	8.55	8.49	8.88	8.82	9.02	
	Not at all important(1)	%	.8	.8	.9	.7	1.1	.5	1.0	.6	.4	2.5	.0	1.4	.3	
	2	%	.6	.9	.8	.5	.7	.0	.8	.3	.7	.0	1.4	.5	.2	
	3	%	.6	.0	.0	1.6	.8	.0	1.2	.0	.0	2.1	.7	.4	.3	
	4	%	1.1	2.6	.8	.3	1.3	2.1	1.4	.8	1.3	1.4	.4	2.1	.6	
	5	%	4.5	2.0	2.3	4.6	7.6	5.7	5.9	3.1	8.3	3.8	2.5	4.5	3.6	
	6	%	4.1	8.9	1.1	2.7	6.4	5.3	4.0	4.1	6.8	3.4	4.4	.7	4.4	
	7	%	7.8	3.8	6.0	7.4	9.0	12.8	8.0	7.6	8.2	10.3	7.3	8.3	5.9	
	8	%	11.1	13.2	8.7	10.9	14.1	9.9	12.5	9.7	11.2	11.1	11.6	11.1	10.5	
	9	%	14.6	13.6	9.1	19.8	15.8	12.5	15.5	13.7	11.5	19.9	16.3	13.3	13.0	
	Extremely important(10)	%	53.7	52.5	69.6	50.5	42.5	49.2	48.2	59.2	50.7	45.1	53.8	56.6	60.2	
	Unsure	%	1.1	1.7	.7	1.0	.6	2.0	1.4	.7	1.0	.5	1.6	1.3	1.0	

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Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important
[Randomize Questions 6 to 8]

			Region					Gender		Age					
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 7 – Having a selection process done as quickly as possible	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	5.92	6.54	5.36	6.03	6.12	5.94	5.88	5.95	5.29	5.66	6.09	5.98	6.43
	Not at all important(1)	%	9.0	5.8	14.0	8.3	7.6	6.2	10.6	7.4	9.9	12.7	8.4	7.8	7.1
	2	%	4.6	3.6	8.2	3.0	3.9	3.4	4.1	5.1	6.4	3.7	3.7	5.4	3.9
	3	%	6.7	4.9	6.7	7.2	5.0	9.3	5.9	7.5	8.7	5.3	7.5	6.1	5.7
	4	%	6.7	7.9	6.9	6.8	4.2	8.3	6.3	7.0	8.8	4.1	6.3	6.6	7.0
	5	%	13.8	9.1	14.9	14.5	13.9	13.8	13.7	14.0	15.5	15.6	13.9	14.5	10.6
	6	%	13.9	10.8	10.1	13.3	18.8	17.2	14.0	13.9	17.8	15.0	12.2	14.7	10.7
	7	%	14.5	20.6	11.1	16.1	15.8	11.0	14.7	14.3	13.3	18.2	11.3	13.8	16.1
	8	%	10.5	7.8	9.7	11.0	13.6	8.6	11.8	9.2	6.9	8.7	12.1	12.7	11.9
	9	%	6.2	8.8	6.9	6.1	6.1	3.7	5.3	7.2	4.2	7.4	9.1	3.7	6.5
	Extremely important(10)	%	12.1	18.2	9.3	12.3	10.3	14.4	11.9	12.2	6.2	6.7	12.9	13.5	19.0
	Unsure	%	2.0	2.5	2.0	1.5	.9	4.1	1.8	2.2	2.2	2.7	2.5	1.3	1.4

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Thinking about the process to select new jet fighters, please rate the importance of each where 1 is not at all important and 10 is extremely important
[Randomize Questions 6 to 8]

			Region					Gender		Age					
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 8 – Having a competitive selection process	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
		Mean	8.22	8.14	8.27	8.27	8.06	8.29	8.07	8.37	7.76	7.96	8.40	8.43	8.47
	Not at all important(1)	%	2.1	1.6	3.3	2.7	1.1	.5	2.6	1.5	4.5	2.7	1.2	1.6	.7
	2	%	.6	1.0	.3	.9	.6	.0	.7	.5	.7	.6	.0	1.3	.5
	3	%	1.1	1.3	.8	1.8	1.0	.0	1.6	.5	.5	2.4	.9	.5	1.1
	4	%	.9	2.0	.3	.8	.3	2.2	1.3	.6	.6	.0	1.4	1.3	1.2
	5	%	5.7	4.1	5.0	5.4	5.6	8.6	6.3	5.0	8.8	6.6	3.2	3.1	6.5
	6	%	5.9	4.2	6.6	3.2	10.3	5.3	5.2	6.6	9.5	3.2	7.0	5.4	4.1
	7	%	13.0	19.1	10.6	11.2	17.0	11.3	13.3	12.8	15.4	17.6	12.8	10.9	9.5
	8	%	16.1	16.4	14.6	15.3	18.1	17.6	17.2	15.1	14.1	18.8	16.6	16.6	15.2
	9	%	15.3	9.0	19.0	17.2	11.4	15.0	16.0	14.7	8.0	17.9	17.6	15.1	17.9
	Extremely important(10)	%	37.5	38.4	38.3	39.6	33.6	36.6	34.4	40.6	35.2	28.0	38.2	42.3	41.9
	Unsure	%	1.8	2.8	1.1	1.9	.9	3.0	1.5	2.0	2.6	2.2	1.1	1.7	1.4

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			Region						Gender		Age				
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 9 – Would you have a positive, somewhat positive, somewhat negative or negative impression of the Government of Canada if it sole sourced the acquisition of new jet fighters to one company without competition?	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Positive	%	3.4	3.8	4.0	2.7	3.4	3.5	4.4	2.4	2.9	6.9	3.4	.3	3.6
	Somewhat positive	%	7.5	10.1	8.9	6.0	9.0	4.4	9.6	5.4	6.8	8.3	6.7	8.8	7.2
	Somewhat negative	%	29.2	24.8	31.7	26.3	31.9	30.1	27.2	31.3	31.3	27.2	30.5	29.2	27.8
	Negative	%	52.6	48.1	47.6	59.6	51.0	52.1	51.2	54.0	45.7	52.3	51.5	56.4	57.0
	Unsure	%	7.3	13.2	7.8	5.3	4.7	9.9	7.7	6.9	13.2	5.4	8.0	5.3	4.5

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			Region						Gender		Age				
			Canada 2016-06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 10 – Do you think Canada would get very good, good, average, poor, or very poor value for tax dollars if it sole sourced the acquisition of new jet fighters to one company without competition?	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Very good	%	2.6	2.0	3.0	1.9	3.6	2.6	2.8	2.4	2.4	2.4	2.9	2.4	2.8
	Good	%	6.1	10.4	7.7	4.9	4.7	4.9	8.0	4.2	5.4	7.5	4.5	4.6	8.1
	Average	%	21.4	28.0	19.9	19.1	23.2	21.8	23.0	19.8	20.9	25.2	23.9	16.8	20.5
	Poor	%	30.4	21.4	30.2	30.9	31.9	34.0	29.7	31.2	28.7	24.5	32.0	34.6	31.6
	Very poor	%	28.8	23.5	32.9	30.0	26.5	26.0	27.7	29.9	31.5	29.2	24.8	31.2	27.8
	Unsure	%	10.7	14.7	6.4	13.3	10.1	10.7	8.9	12.4	11.0	11.2	11.8	10.3	9.2

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			Region						Gender		Age				
			Canada 2016–06	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question 11 – Would you say from a time perspective, it is urgent, somewhat urgent, somewhat not urgent or not urgent for the Government of Canada to select a replacement for its aging jet fighters?	Total	Unwgt N	1000	100	250	300	200	150	500	500	161	139	188	228	284
		Wgt N	1000	100	250	300	200	150	500	500	205	169	208	178	239
	Urgent	%	16.4	21.6	7.8	20.3	18.4	16.5	20.5	12.3	10.0	17.6	19.0	14.8	19.7
	Somewhat urgent	%	46.6	52.7	38.0	45.5	52.5	51.2	45.5	47.8	41.1	46.4	46.8	48.8	49.8
	Somewhat not urgent	%	19.4	12.2	27.3	17.8	13.6	21.7	16.8	22.0	21.4	19.9	17.8	17.8	19.8
	Not urgent	%	13.9	10.9	23.3	13.2	11.1	5.7	14.6	13.3	22.8	11.4	11.9	15.0	9.2
	Unsure	%	3.7	2.5	3.6	3.1	4.3	4.8	2.7	4.7	4.6	4.7	4.5	3.5	1.5

Nanos conducted a national RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 26th, 2016. The margin of error for a random survey of 1,000 Canadians is 3.1 percentage points, 19 times out of 20.

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