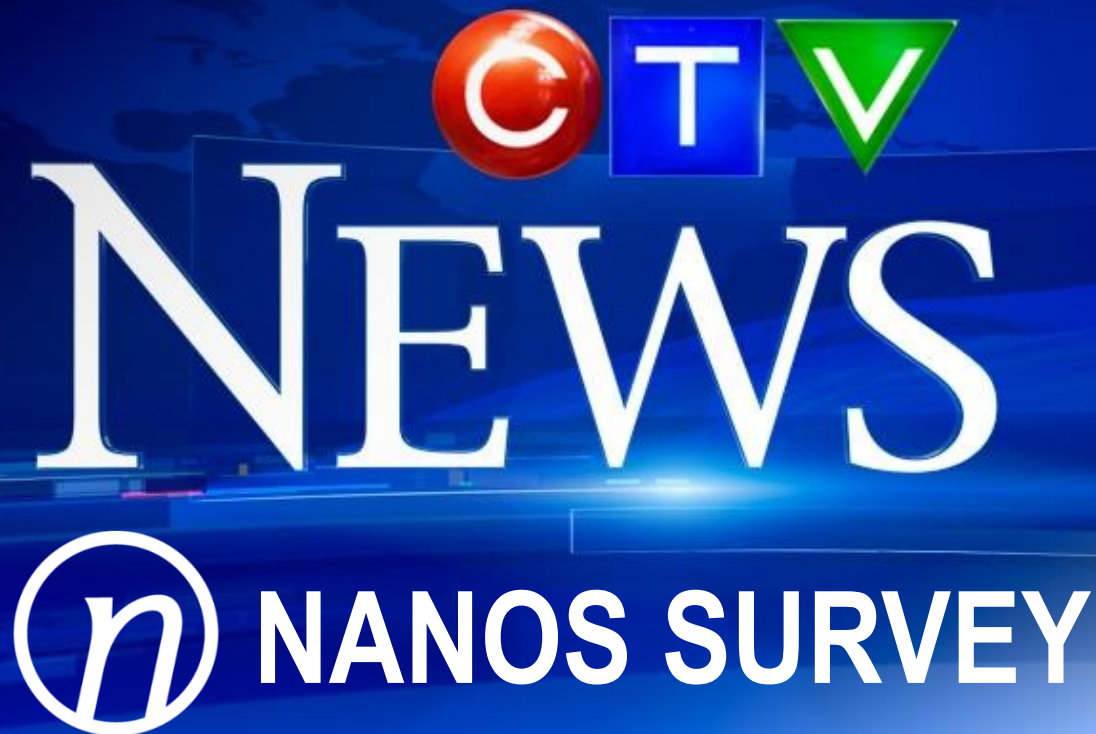


Views of Canadians on the economy and the country's relationship with the USA

National survey released December, 2016
Project 2016-939





Canadians believe defence spending should be increased and that the economy is better off because of NAFTA

Canadians have mixed feelings on whether the Trump Administration will continue to treat Canada as the closest friend and ally of the US. Canadians are ready to pay a fair share with NATO and think the potential Keystone XL pipeline approval would be good news for Canada. However, Canadians are generally against making special provisions to accept illegal aliens deported from the United States.

- **Canadians have mixed feelings on whether the Trump Administration will continue to treat Canada as the United States' closest friend and ally** – Over two fifths of Canadians disagree (22%) or somewhat disagree (22%) that the Trump Administration will continue to treat Canada as the United States' closest friend and ally, while another two fifths agree (14%) or somewhat agree (27%) with this. Fifteen per cent of Canadians are unsure.
- **Over six in ten Canadians agree or somewhat agree that the country should increase defence spending so that it pays its fair share of military costs as part of NATO** – More than six in ten Canadians agree (28%) or somewhat agree (35%) that Canada should increase defence spending in order to pay its fair share of military costs as part of NATO, while just over three in ten Canadians disagree (11%) or somewhat disagree (21%) with this. Five per cent of Canadians are unsure.
- **Close to two thirds of Canadians agree or somewhat agree the approval by the United States of the Keystone XL pipeline which connects the oil sands to the US market would be beneficial for Canada** – Over six in ten Canadians agree (38%) or somewhat agree (25%) the approval by the United States of the Keystone XL pipeline which connects the oil sands to the US market would be good news for Canada. Three in ten Canadians disagree (18%) or somewhat disagree (14%) with this, while six per cent are unsure.
- **A majority of Canadians disagree or somewhat disagree with Canada making special provisions to accept illegal aliens who may be deported from the United States** – Six in ten Canadians disagree (43%) or somewhat disagree (18%) with Canada making special provisions to welcome illegal aliens who may be deported from the United States, while just over two in ten agree (10%) or somewhat agree (22%) with this. Seven per cent of Canadians are unsure.
- **Close to six in ten Canadians believe the Canadian economy is better off because of NAFTA** – Fifty-seven per cent of Canadians think the Canadian economy is better off because of the North American Free Trade Agreement between Canada, the United States and Mexico, while 20 per cent say it is worse off and six per cent say it had no impact. This represents an increase of nearly 30 points for 'better off' since 2012.

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 November 26th and 30th, 2016 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

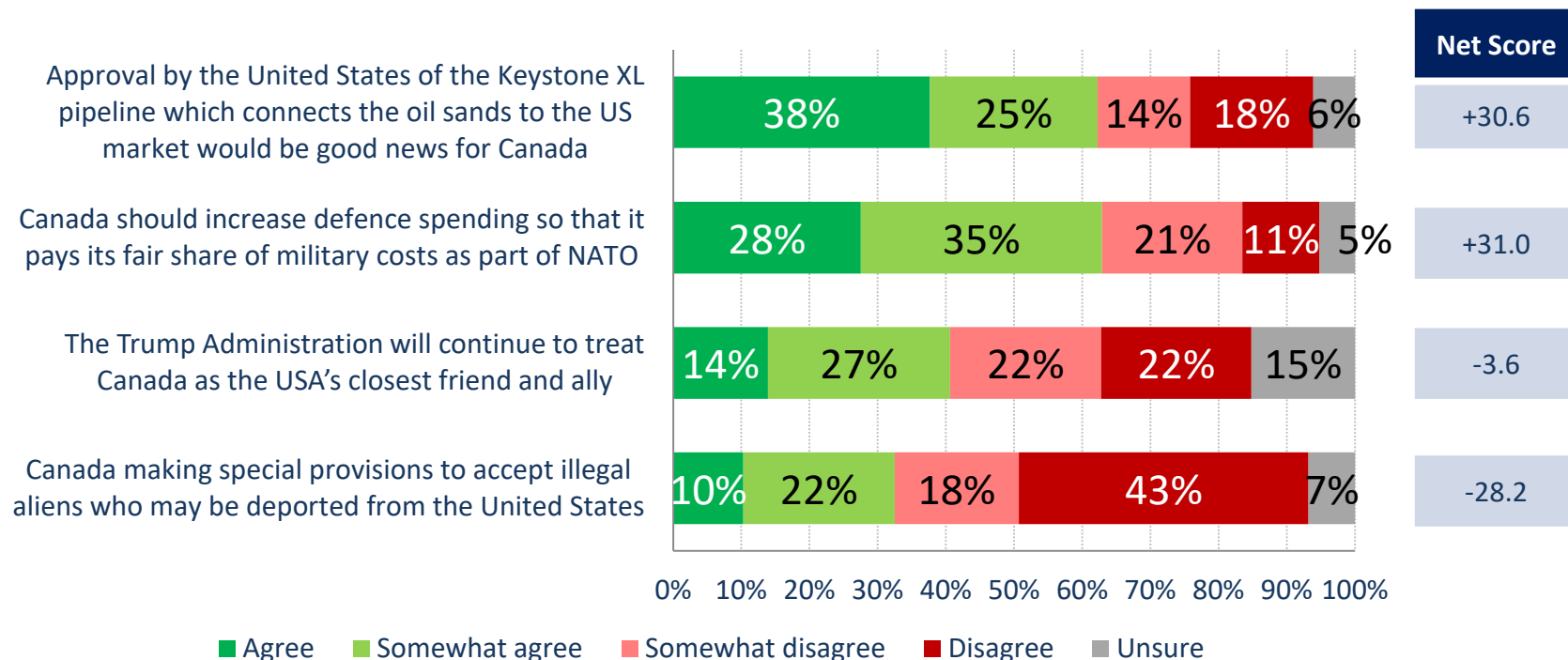
This study was commissioned by CTV News.



NANOS SURVEY

The economy and Canada's relationship with the USA

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



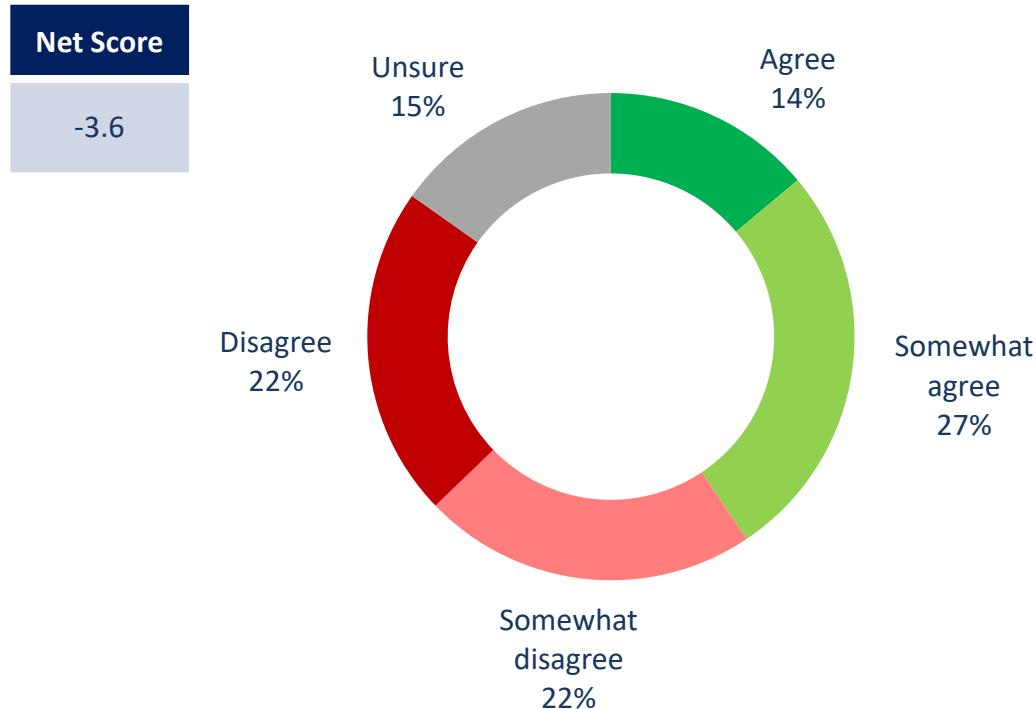
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following: [RANDOMIZE]



Canada-USA relationship

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Disagree/ Somewhat disagree
Atlantic (n=100)	54.7%
Quebec (n=250)	41.1%
Ontario (n=300)	41.9%
Prairies (n=200)	42.0%
British Columbia (n=150)	49.8%
Male (n=513)	36.6%
Female (n=487)	51.4%
18 to 29 (n=175)	48.2%
30 to 39 (n=163)	41.3%
40 to 49 (n=202)	44.9%
50 to 59 (n=204)	44.9%
60 plus (n=256)	42.2%

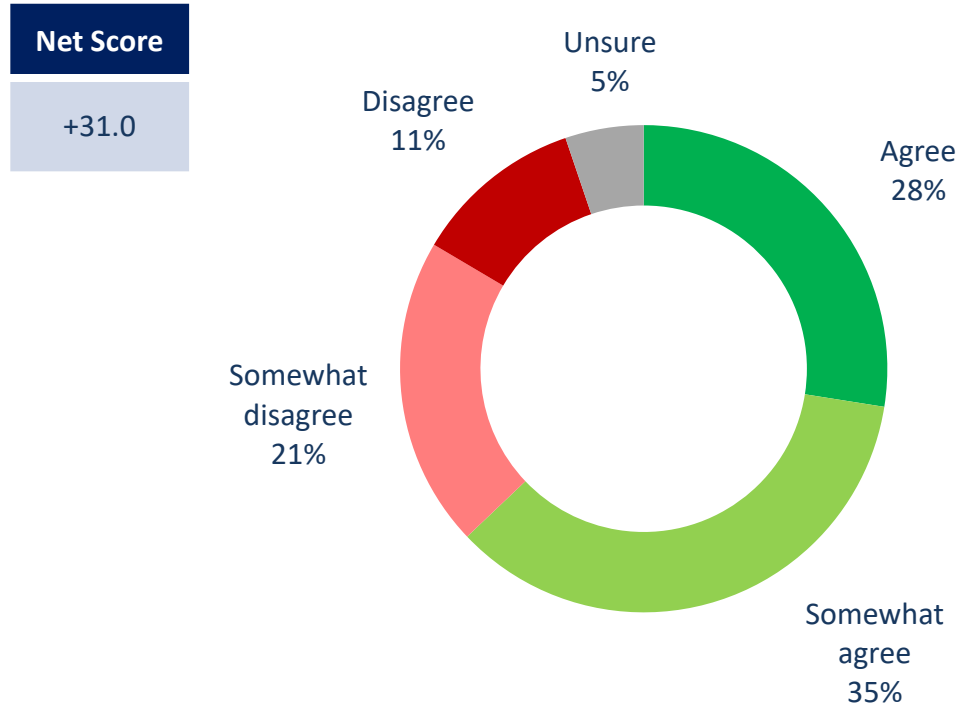
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following: [RANDOMIZE]

The Trump Administration will continue to treat Canada as the USA's closest friend and ally

Canada's defense spending

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	61.6%
Quebec (n=250)	54.6%
Ontario (n=300)	65.5%
Prairies (n=200)	70.3%
British Columbia (n=150)	62.5%
Male (n=513)	72.5%
Female (n=487)	53.8%
18 to 29 (n=175)	53.6%
30 to 39 (n=163)	60.3%
40 to 49 (n=202)	64.8%
50 to 59 (n=204)	63.1%
60 plus (n=256)	69.9%

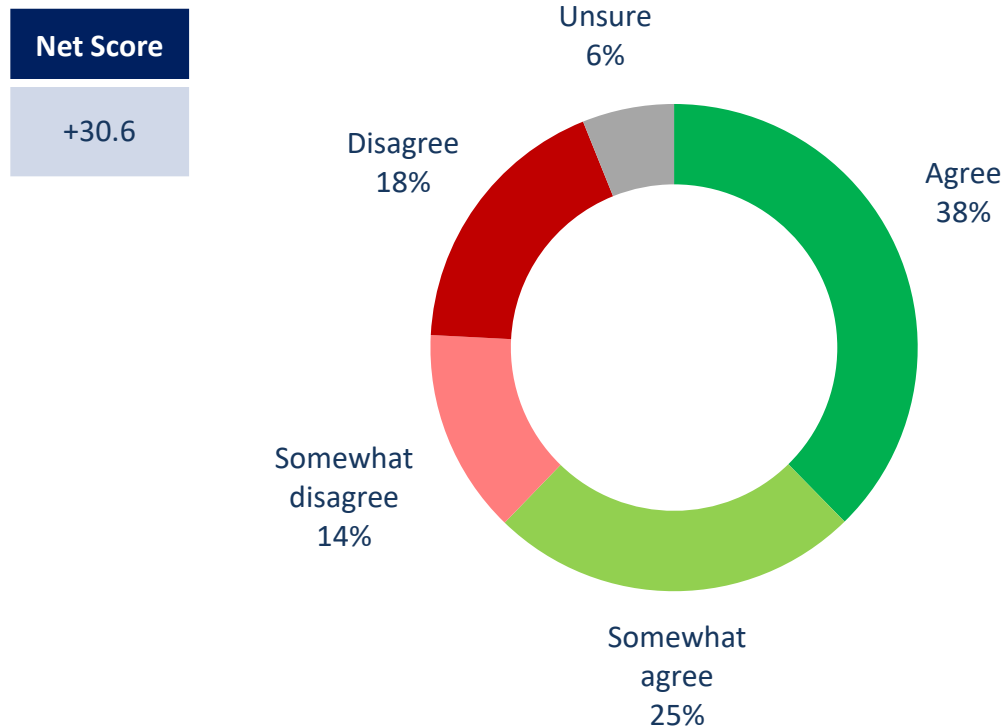
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following: [RANDOMIZE]

Canada should increase defense spending so that it pays its fair share of military costs as part of NATO

Approval of the Keystone XL pipeline

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	63.1%
Quebec (n=250)	54.4%
Ontario (n=300)	59.1%
Prairies (n=200)	78.6%
British Columbia (n=150)	59.1%
Male (n=513)	74.5%
Female (n=487)	50.6%
18 to 29 (n=175)	55.5%
30 to 39 (n=163)	56.4%
40 to 49 (n=202)	61.4%
50 to 59 (n=204)	63.7%
60 plus (n=256)	70.3%

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

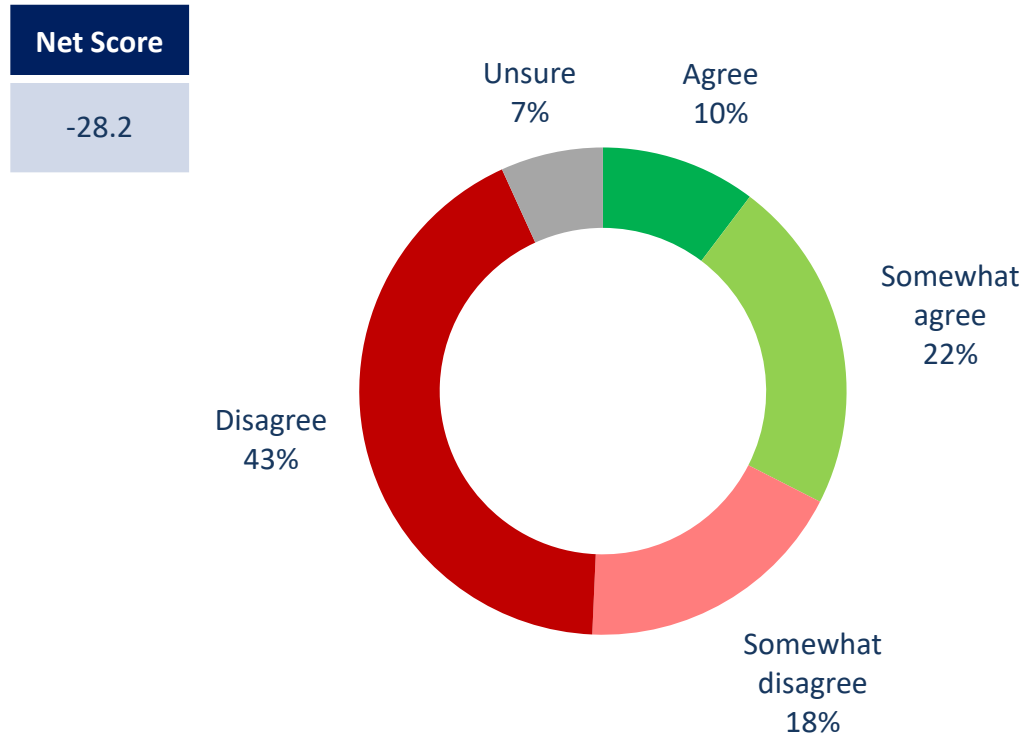
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following: [RANDOMIZE]

Approval by the United States of the Keystone XL pipeline which connects the oil sands to the US market would be good news for Canada



Acceptance of illegal aliens

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Disagree/ Somewhat disagree
Atlantic (n=100)	55.4%
Quebec (n=250)	62.5%
Ontario (n=300)	58.7%
Prairies (n=200)	65.3%
British Columbia (n=150)	58.8%
Male (n=513)	63.4%
Female (n=487)	58.0%
18 to 29 (n=175)	55.5%
30 to 39 (n=163)	63.9%
40 to 49 (n=202)	58.0%
50 to 59 (n=204)	58.7%
60 plus (n=256)	65.8%

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

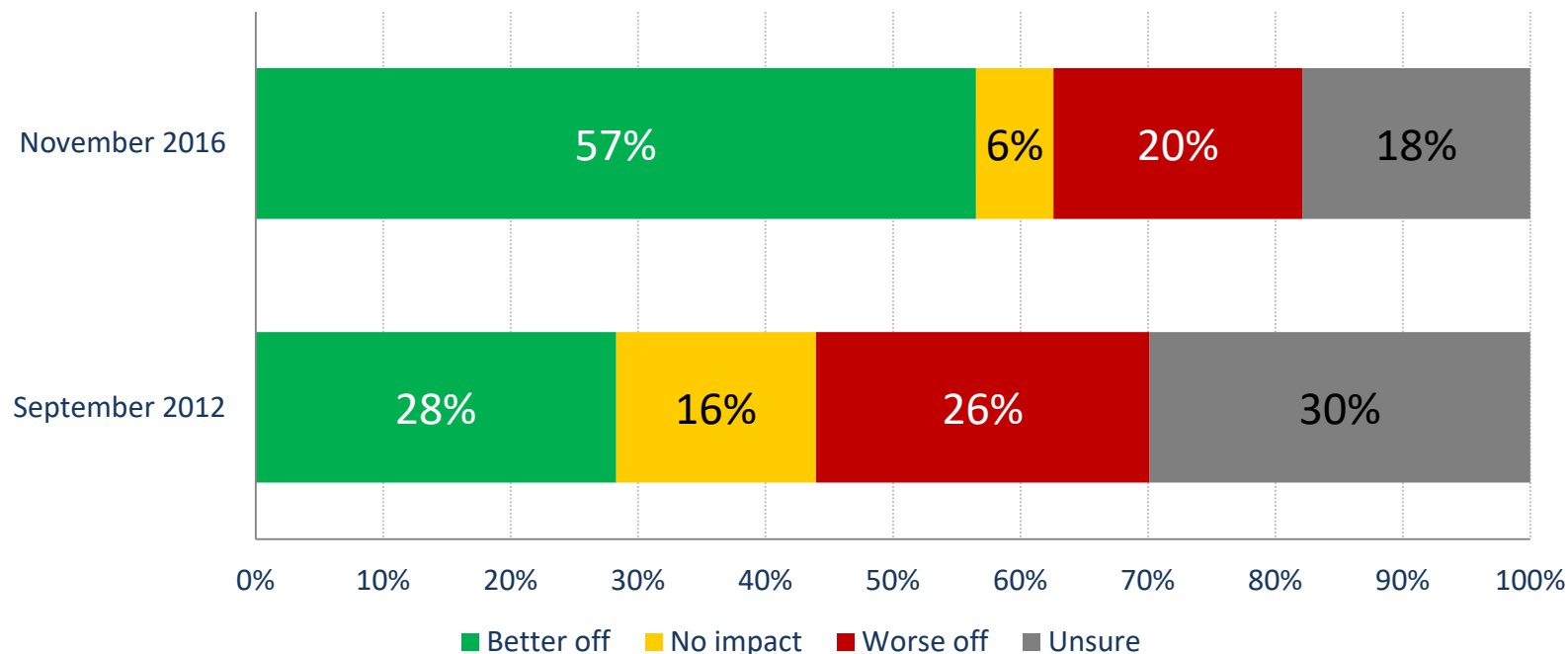
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following: [RANDOMIZE]

Canada making special provisions to accept illegal aliens who may be deported from the United States

NAFTA's impact on the economy

Source: Nanos Survey, 2012-09 (Canada n=1000)

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



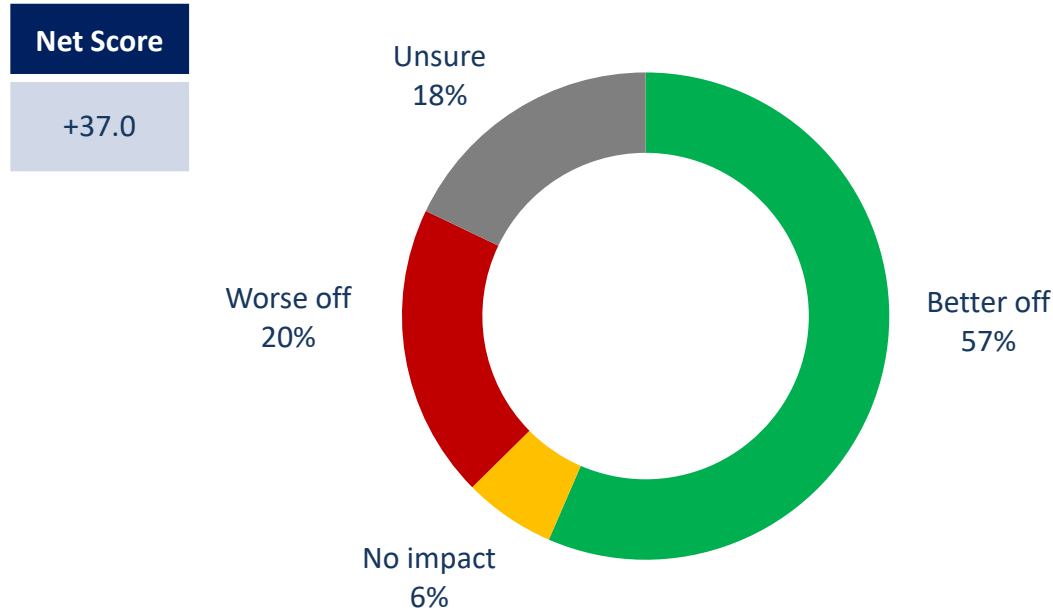
***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you think the Canadian economy is better off, worse off or there has been no impact because of the North American Free Trade Agreement between Canada, the United States and Mexico?



NAFTA's impact on the economy

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, November 26th to 30th, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Better off
Atlantic (n=100)	47.7%
Quebec (n=250)	60.9%
Ontario (n=300)	52.7%
Prairies (n=200)	59.5%
British Columbia (n=150)	58.8%
Male (n=513)	62.6%
Female (n=487)	50.8%
18 to 29 (n=175)	51.9%
30 to 39 (n=163)	53.7%
40 to 49 (n=202)	53.6%
50 to 59 (n=204)	54.3%
60 plus (n=256)	65.3%

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

QUESTION – Do you think the Canadian economy is better off, worse off or there has been no impact because of the North American Free Trade Agreement between Canada, the United States and Mexico

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 November 26th and 30th, 2016 as part of an omnibus survey. 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 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 data presented in this research is part of a joint project by CTV News and Nanos Research.

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

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	CTV News	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
Final Sample Size	1,000 Randomly selected individuals.	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.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	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.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	14 percent, consistent with industry norms.
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.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Demographics (Other)	Age, gender, education, income	Question Content	This was module two of an omnibus survey. The previous module included a question about the top unprompted issue of national concern.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Number of Calls/	Maximum of five call backs.	Survey Company	Nanos Research
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	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.
Field Dates	November 26 th to 30 th , 2016.		
Language of Survey	The survey was conducted in both English and French.		



NANOS SURVEY

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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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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info@nanosresearch.com



Tabulations



2016-939 – CTV/Nanos Survey – CTV November - STAT SHEET

Question - Do you agree, somewhat agree, somewhat disagree or disagree with the following [RANDOMIZE]

		Region							Gender		Age				
							British Columbia								
		Canada 2016-11	Atlantic Canada	Quebec	Ontario	Prairies			Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The Trump Administration will continue to treat Canada as the USA's closest friend and ally	Total	Unwgt N	1000	100	250	300	200	150	513	487	175	163	202	204	256
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Agree	%	13.9	14.0	16.5	11.5	15.3	12.5	17.7	10.4	11.6	18.4	14.0	16.5	11.0
	Somewhat agree	%	26.7	19.4	28.2	28.4	31.4	19.2	32.7	21.0	26.9	24.9	27.5	24.1	28.9
	Somewhat disagree	%	22.2	31.5	22.8	20.0	15.4	28.6	21.6	22.8	22.7	18.9	23.6	21.2	23.8
	Disagree	%	22.0	23.2	18.3	21.9	26.6	21.2	15.0	28.6	25.5	22.4	21.3	23.7	18.4
	Unsure	%	15.2	12.1	14.1	18.1	11.2	18.5	13.0	17.3	13.4	15.4	13.6	14.5	18.0

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 November 26th and 30th, 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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2016-939 – CTV/Nanos Survey – CTV November - STAT SHEET

Question - Do you agree, somewhat agree, somewhat disagree or disagree with the following [RANDOMIZE]

			Region						Gender		Age				
			Canada 2016-11	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Canada should increase defence spending so that it pays its fair share of military costs as part of NATO	Total	Unwgt N	1000	100	250	300	200	150	513	487	175	163	202	204	256
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Agree	%	27.5	26.5	18.6	29.7	37.0	25.7	37.3	18.1	26.6	22.2	28.0	32.5	27.5
	Somewhat agree	%	35.4	35.1	36.0	35.8	33.3	36.8	35.2	35.7	27.0	38.1	36.8	30.6	42.4
	Somewhat disagree	%	20.6	22.0	28.3	15.8	16.0	22.7	14.2	26.7	21.7	20.7	23.9	19.0	18.7
	Disagree	%	11.3	10.7	12.4	12.6	8.9	10.6	10.6	12.0	19.2	11.9	7.6	11.7	7.5
	Unsure	%	5.2	5.7	4.7	6.1	4.9	4.2	2.7	7.6	5.4	7.2	3.8	6.3	4.0

2016-939 – CTV/Nanos Survey – CTV November - STAT SHEET

Question - Do you agree, somewhat agree, somewhat disagree or disagree with the following [RANDOMIZE]

			Region							Gender		Age				
			British													
			Canada 2016-11	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus	
Question - Approval by the	Total	Unwgt N	1000	100	250	300	200	150	513	487	175	163	202	204	256	
United States of the																
Keystone XL pipeline which		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265	
connects the oil sands to the																
US market would be good	Agree	%	37.7	41.6	27.8	33.7	55.3	35.8	49.2	26.7	31.3	34.8	34.4	41.3	43.8	
news for Canada.																
	Somewhat agree	%	24.6	21.5	26.6	25.4	23.3	23.3	25.3	23.9	24.2	21.6	27.0	22.4	26.5	
	Somewhat disagree	%	13.6	13.8	19.8	12.3	7.3	14.2	10.1	16.9	13.8	15.2	16.5	14.3	10.0	
	Disagree	%	18.1	18.2	21.1	19.1	8.4	23.8	12.4	23.4	25.0	20.3	15.2	15.5	15.4	
	Unsure	%	6.1	4.8	4.7	9.5	5.7	3.0	2.9	9.1	5.7	8.2	6.9	6.5	4.2	

2016-939 – CTV/Nanos Survey – CTV November - STAT SHEET

Question - Do you agree, somewhat agree, somewhat disagree or disagree with the following [RANDOMIZE]

			Region						Gender		Age				
			Canada 2016-11	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Canada making special provisions to accept illegal aliens who may be deported from the United States.	Total	Unwgt N	1000	100	250	300	200	150	513	487	175	163	202	204	256
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Agree	%	10.3	15.3	11.8	8.5	10.1	8.4	10.4	10.3	19.1	5.6	9.8	8.5	8.3
	Somewhat agree	%	22.2	23.9	20.9	24.7	17.1	25.4	20.7	23.7	19.6	25.9	25.3	21.9	20.0
	Somewhat disagree	%	18.2	16.3	25.1	18.8	11.5	15.8	18.6	17.8	18.6	17.6	17.7	18.1	18.7
	Disagree	%	42.5	39.1	37.4	39.9	53.8	43.0	44.8	40.2	36.9	46.3	40.3	40.6	47.1
	Unsure	%	6.8	5.4	4.8	8.1	7.5	7.4	5.5	8.0	5.9	4.5	6.8	10.8	6.0

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			Region						Gender		Age				
			Canada 2016-												
			11	Atlantic Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Do you think the Canadian economy is better off, worse off or there has been no impact because of the North American Free Trade Agreement between Canada, the United States and Mexico?	Total	Unwgt N	1000	100	250	300	200	150	513	487	175	163	202	204	256
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Better off	%	56.5	47.7	60.9	52.7	59.5	58.8	62.6	50.8	51.9	53.7	53.6	54.3	65.3
	Worse off	%	19.5	20.1	16.1	24.7	13.8	21.9	17.1	21.8	24.2	19.8	19.0	23.6	13.3
	There has been no impact	%	6.1	10.9	7.2	4.5	6.1	4.4	6.7	5.6	3.3	8.9	7.5	5.2	6.2
	Unsure	%	17.9	21.2	15.8	18.1	20.6	14.9	13.6	21.9	20.6	17.6	19.9	16.9	15.2

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 November 26th and 30th, 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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