

Canadians on the relationship between Canada and the US

National survey released February 2017
Project 2017-964A

THE GLOBE AND MAIL 

 NANOS SURVEY



Majority support or somewhat support possible trade war with the US

Most Canadians support or somewhat support the Canadian government maintaining the commitment to dramatically reduce methane emissions and Canada having a trade war with the U.S if new tariffs are put on Canadian goods that are entering the U.S. Over half of Canadians oppose or somewhat oppose the government reducing tax rates on corporations. Finally, the majority of Canadians are confident or somewhat confident that Canada can protect its economic interests if the NAFTA is renegotiated.

- **Over seven out of ten Canadians support or somewhat support the government maintaining the commitment to dramatically reduce methane emissions** – Seven out of ten Canadians support (49%) or somewhat support (22%) the Canadian government maintaining the commitment to dramatically reduce methane emissions from the oil and gas sector in Canada even if the U.S does not reduce its methane emissions. More than one out of four Canadians somewhat oppose (ten per cent) or oppose (17%) this. Two per cent are unsure.
- **More than half of Canadians oppose or somewhat oppose the government reducing tax rates on corporations to mirror the expected lower corporate taxes** – More than one out of two Canadians oppose (32%) or somewhat oppose (22%) the Canadian government reducing tax rates on corporations to mirror the expected lower corporate taxes to be introduced by President Trump in the United States. Two out of five Canadians support (19%) or somewhat support (21%) this. Seven per cent are unsure.
- **Almost six out of ten Canadians support or somewhat support Canada having a trade war with the U.S if new tariffs are put on Canadian goods entering the U.S** – Nearly three out of five Canadians support (25%) or somewhat support (33%) having a trade war with the U.S if the U.S puts new tariffs on Canadian good entering their country. Over one out of three Canadians oppose (18%) or somewhat oppose (17%) this. Eight per cent are unsure.
- **The majority of Canadians are confident or somewhat confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated** – Close to six out of ten Canadians are confident (17%) or somewhat confident (40%) that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated, while four out of ten Canadians are not confident (16%) or somewhat not confident (24%). Three per cent are unsure.

These observations are based on 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 January 28th and February 1st, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 the Globe and Mail.

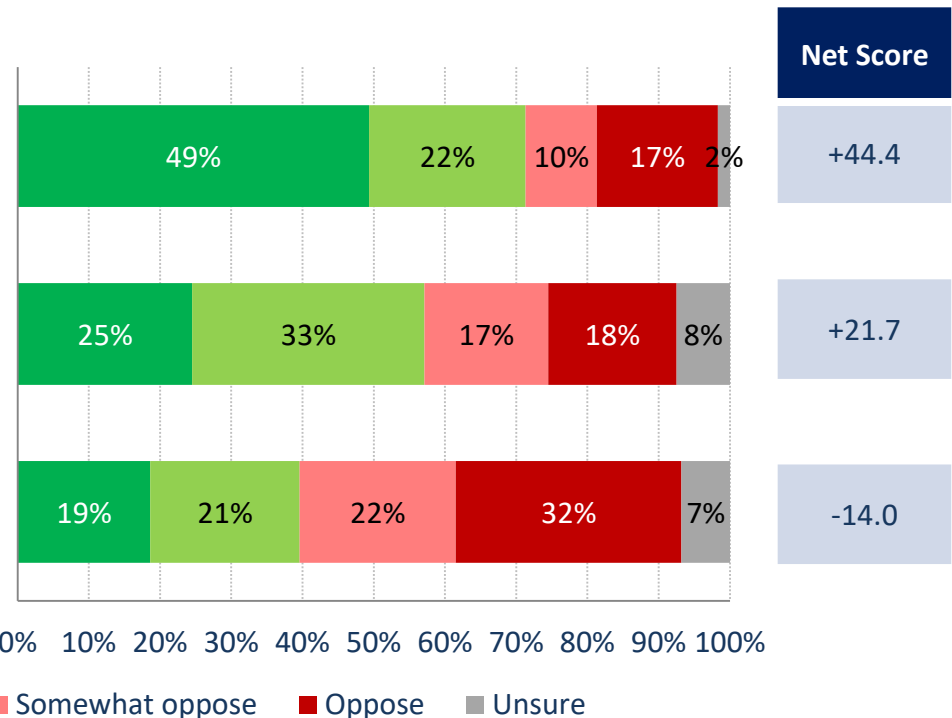
Support for relations between Canadian government and US

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

The Canadian government maintaining its commitment to dramatically reduce methane emissions from the oil and gas sector in Canada even if the U.S. does not reduce its methane emissions?

Canada having a trade war with the U.S. if the U.S. puts new tariffs on Canadian goods entering the U.S.?

The Canadian government reducing tax rates on corporations to mirror the expected lower corporate taxes to be introduced by President Trump in the United States?

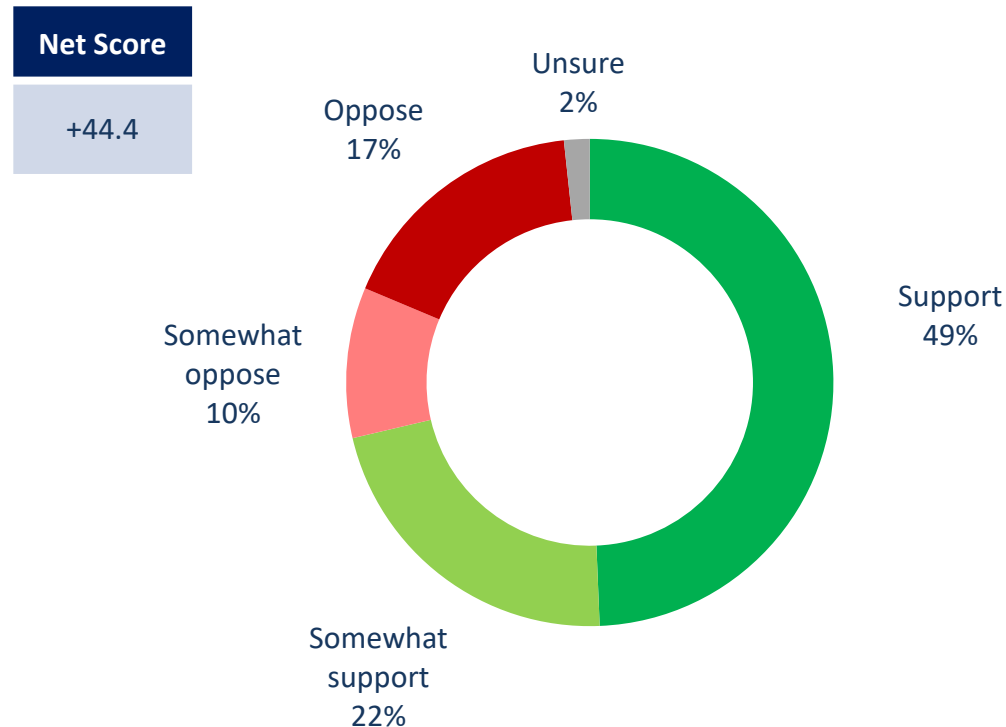


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

Reducing methane emissions

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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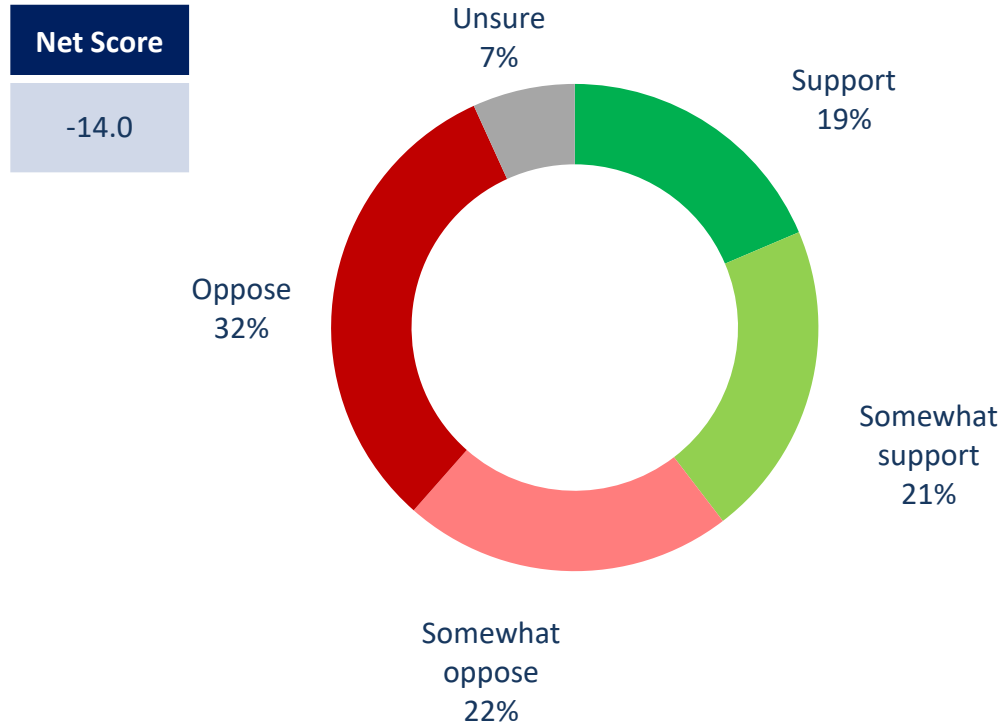
Subgroups	Support/ Somewhat support
Atlantic (n=100)	79.8%
Quebec (n=250)	81.9%
Ontario (n=300)	67.1%
Prairies (n=200)	57.4%
British Columbia (n=150)	75.5%
Male (n=484)	62.7%
Female (n=516)	79.7%
18 to 29 (n=174)	73.8%
30 to 39 (n=149)	75.0%
40 to 49 (n=209)	72.7%
50 to 59 (n=222)	66.2%
60 plus (n=246)	70.1%

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

The Canadian government maintaining its commitment to dramatically reduce methane emissions from the oil and gas sector in Canada even if the U.S. does not reduce its methane emissions?

Reducing tax rates on corporations

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Oppose/ Somewhat oppose
Atlantic (n=100)	53.5%
Quebec (n=250)	55.1%
Ontario (n=300)	49.4%
Prairies (n=200)	51.3%
British Columbia (n=150)	62.7%
Male (n=484)	45.6%
Female (n=516)	61.3%
18 to 29 (n=174)	57.9%
30 to 39 (n=149)	55.9%
40 to 49 (n=209)	52.8%
50 to 59 (n=222)	51.3%
60 plus (n=246)	51.3%

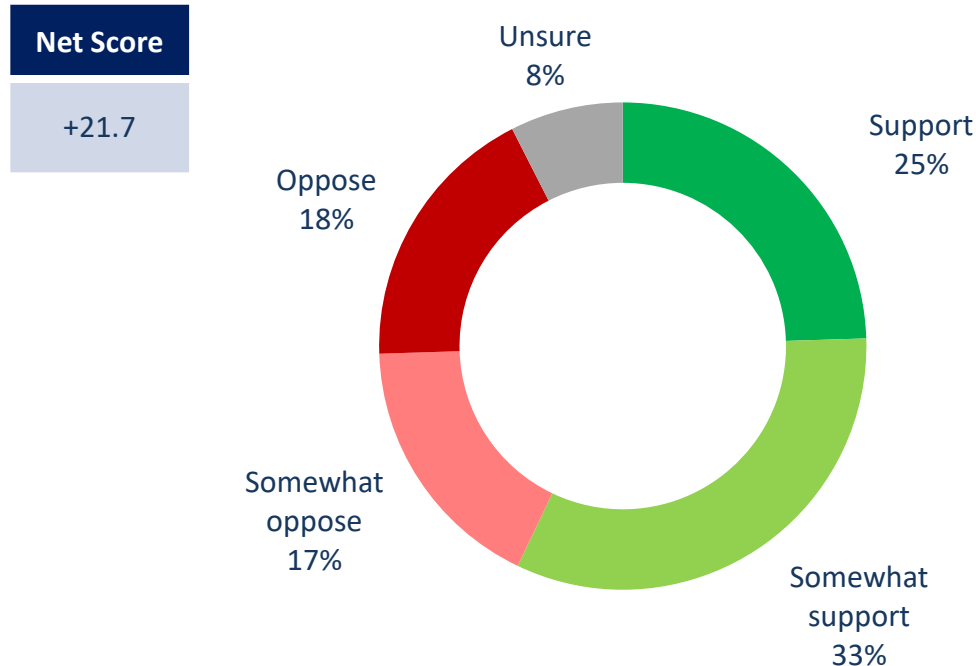
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

The Canadian government reducing tax rates on corporations to mirror the expected lower corporate taxes to be introduced by President Trump in the United States?

Trading with the U.S.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Support/ Somewhat support
Atlantic (n=100)	61.4%
Quebec (n=250)	56.2%
Ontario (n=300)	56.4%
Prairies (n=200)	55.6%
British Columbia (n=150)	59.4%
Male (n=484)	54.2%
Female (n=516)	59.9%
18 to 29 (n=174)	55.8%
30 to 39 (n=149)	57.5%
40 to 49 (n=209)	63.0%
50 to 59 (n=222)	56.1%
60 plus (n=246)	54.3%

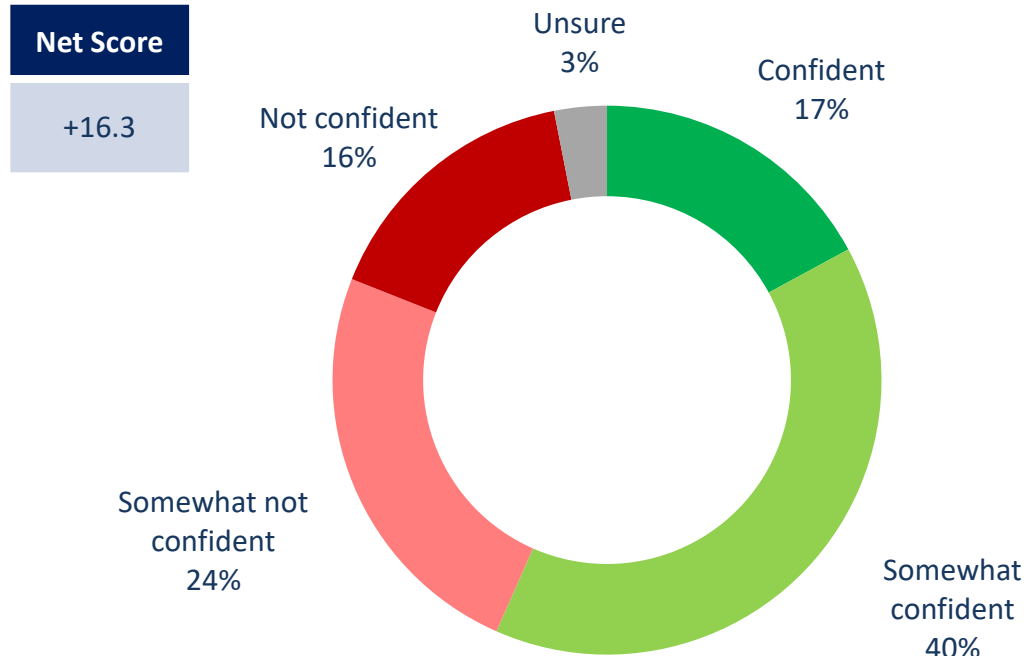
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

Canada having a trade war with the U.S. if the U.S. puts new tariffs on Canadian goods entering the U.S.?

Protecting Canada's economic interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Confident/ Somewhat confident
Atlantic (n=100)	60.2%
Quebec (n=250)	58.5%
Ontario (n=300)	54.2%
Prairies (n=200)	53.9%
British Columbia (n=150)	59.2%
Male (n=484)	57.9%
Female (n=516)	55.2%
18 to 29 (n=174)	49.8%
30 to 39 (n=149)	55.4%
40 to 49 (n=209)	56.1%
50 to 59 (n=222)	58.9%
60 plus (n=246)	60.9%

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

QUESTION – Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?



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 January 28th to February 1st, 2017 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 The Globe and Mail 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	Globe and Mail	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	13 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 three of an omnibus survey. The previous modules related to unprompted top national issues of concern, international trade and voting for the political party.
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	January 28 th to February 1 st , 2017.		
Language of Survey	The survey was conducted in both English and French.		

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.



Tabulations



2017-964 – Globe and Mail/Nanos Survey – Canada and the US – STAT SHEET

Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

			Region						Gender		Age				
			Canada 2017-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The Canadian government maintaining its commitment to dramatically reduce methane emissions from the oil and gas sector in Canada even if the U.S. does not reduce its.	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Support	%	49.4	55.2	55.3	46.3	39.2	55.4	41.7	56.7	51.6	54.4	51.9	44.7	46.2
	Somewhat support	%	22.0	24.6	26.6	20.8	18.2	20.1	21.0	23.0	22.2	20.6	20.8	21.5	23.9
	Somewhat oppose	%	10.0	9.9	6.6	10.9	13.0	9.6	12.6	7.4	8.6	4.9	10.4	13.5	11.2
	Oppose	%	17.0	9.0	10.0	19.6	28.0	14.2	22.8	11.4	16.0	17.3	15.1	19.0	17.4
	Unsure	%	1.7	1.2	1.6	2.4	1.6	.6	1.9	1.5	1.6	2.7	1.8	1.3	1.3

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random omnibus survey of 1,000 Canadians, 18 years of age or older, between January 28th and February 1st, 2017.
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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2017-964 – Globe and Mail/Nanos Survey – Canada and the US – STAT SHEET

Do you support, somewhat support, somewhat oppose or oppose the following [RANDOMIZE]

			Region					Gender		Age					
			Canada 2017-01												
				Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
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		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Support	%	18.6	13.2	16.4	20.8	22.3	16.2	25.3	12.2	13.0	20.5	22.2	19.6	18.2
	Somewhat support	%	21.0	22.2	17.8	23.5	21.6	19.5	24.6	17.5	20.6	13.6	18.7	24.5	24.7
	Somewhat oppose	%	21.9	28.5	23.3	18.2	22.3	22.1	19.5	24.2	22.0	22.8	19.8	21.8	22.9
	Oppose	%	31.7	25.0	31.8	31.2	29.0	40.6	26.1	37.1	35.9	33.1	33.0	29.5	28.4
	Unsure	%	6.8	11.1	10.7	6.2	4.8	1.5	4.5	9.0	8.5	10.0	6.2	4.6	5.8

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			Region						Gender		Age				
			Canada 2017-01												
				Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Canada having a trade war with the U.S. if the U.S. puts new tariffs on Canadian goods entering the U.S.	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Support	%	24.5	22.7	22.4	24.8	24.9	28.0	25.5	23.5	23.3	24.4	30.1	21.4	23.5
	Somewhat support	%	32.6	38.7	33.8	31.6	30.7	31.4	28.7	36.4	32.5	33.1	32.9	34.7	30.8
	Somewhat oppose	%	17.4	14.9	19.2	17.0	16.7	17.5	18.4	16.4	16.2	17.0	15.0	18.0	19.7
	Oppose	%	18.0	16.9	18.3	18.0	19.5	16.3	22.8	13.5	17.4	15.3	15.2	18.1	22.1
	Unsure	%	7.5	6.8	6.4	8.6	8.2	6.8	4.7	10.1	10.6	10.2	6.8	7.9	3.8

2017-964 – Globe and Mail/Nanos Survey – Canada and the US – STAT SHEET

			Region						Gender		Age				
			Canada 2016-12	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Confident	%	17.1	20.0	17.1	16.9	17.3	15.1	17.7	16.4	18.6	18.1	18.4	13.8	16.6
	Somewhat confident	%	39.5	40.2	41.4	37.3	36.6	44.1	40.2	38.8	31.2	37.3	37.7	45.1	44.3
	Somewhat not confident	%	24.4	23.7	26.5	24.3	23.1	23.3	21.7	26.9	31.7	24.4	27.3	19.2	20.7
	Not confident	%	15.9	13.3	11.5	18.3	19.9	15.0	18.9	13.1	15.5	15.8	13.3	19.9	15.5
	Unsure	%	3.1	2.8	3.6	3.2	3.1	2.5	1.4	4.8	3.1	4.5	3.4	2.1	3.0

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