

# Majority of Canadians concerned or somewhat concerned about Trump saying trade dispute will cost Canadians a lot of money; are ready to boycott the U.S. if there is a trade war

Part 1 of 2 – Survey Summary

submitted by Nanos to The Globe and Mail, CTV News, July 2018  
(Submission 2018-1227/1229)



# Summary

A majority of Canadians are concerned or somewhat concerned about Trump saying the trade dispute will cost Canadians a lot of money and if there is a trade war between the two countries, a majority of Canadians are likely or somewhat likely to stop travelling to the U.S. , boycott U.S. made goods and stop shopping at U.S. retailers in Canada.

- **A majority of Canadians are concerned or somewhat concerned about Trump's claim that the trade dispute will cost Canadians a lot of money** – When asked if they were concerned about Trump's claim that the trade dispute will cost Canadians a lot of money, over seven in ten Canadians say that they are concerned (38%) or somewhat concerned (35%) about Trump's claim. Just over one in four say they are somewhat not concerned (14%) or not concerned (12%) about it. One per cent are unsure.
- **Nearly three in four Canadians are likely or somewhat likely to stop travelling to the United States in response to a trade war between the two countries** – When asked how likely they were to curtail or stop travelling to the United States if there is a trade war between the two countries, a majority of Canadians say they are likely (57%) or somewhat likely (16%) to do so. One in four say they are somewhat unlikely (8%) or unlikely (17%) to curtail or stop travelling to the United States in the case of a trade war. Two per cent are unsure.
- **Just over seven in ten Canadians are likely or somewhat likely to boycott U.S. made goods in response to a trade war between the two countries** – The majority of Canadians say they are likely (43%) or somewhat likely (29%) to boycott U.S. made goods if there is a trade war between the two countries. Twenty-six per cent say they are somewhat unlikely (10%) or unlikely (16%) to do so. Two per cent are unsure.
- **Majority of Canadians are likely or somewhat likely to stop shopping at US retailers in Canada in response to a trade war between the two countries** – When asked how likely they were to stop stopping at US retailers in Canada if there is a trade war between the two countries, nearly seven in ten Canadians say they are likely (43%) or somewhat likely (25%) to stop. Close to three in ten say they are somewhat unlikely (13%) or unlikely (16%) to stop shopping at US retailers in Canada. Three per cent are unsure.
- **Seven in ten Canadians support or somewhat support government aid to steel and aluminum companies affected by US tariffs** – When asked their level of support for the government providing financial aid to the steel and aluminum companies affected by US tariffs, seven in ten Canadians say they would support (39%) or somewhat support (31%) this decision. Twenty-four per cent say they would somewhat oppose (13%) or oppose (11%) this. Six per cent are unsure.
- **Just over half of Canadians support or somewhat support the government providing financial aid to automobile companies affected by US tariffs** – Fifty one per cent of Canadians say they would support (17%) or somewhat support (34%) the government providing financial aid to automobile companies affected by US tariffs, while 42 per cent say they would somewhat oppose (21%) or oppose (21%) this decision. Six per cent are unsure.

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 26<sup>th</sup> and 28<sup>th</sup>, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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.

The research was commissioned by The Globe and Mail and CTV News and was conducted by Nanos Research.



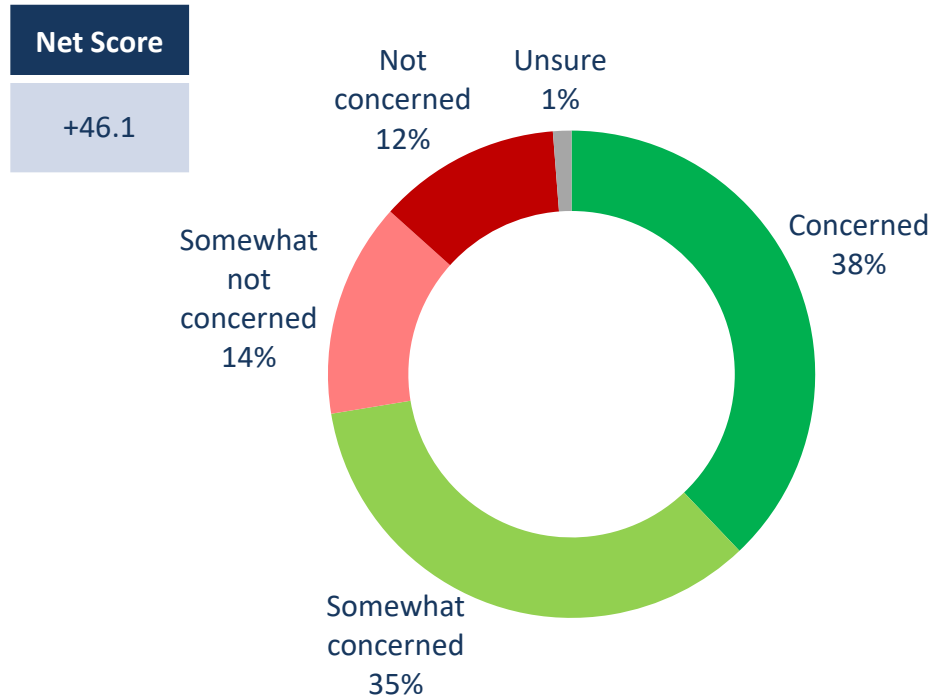
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# Concern with Trumps claims about the trade dispute

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



Subgroups	Concerned/ Somewhat concerned
Atlantic (n=100)	72.2%
Quebec (n=250)	73.8%
Ontario (n=300)	72.8%
Prairies (n=200)	72.8%
British Columbia (n=150)	68.8%
Male (n=520)	68.9%
Female (n=480)	75.8%
18 to 34 (n=178)	62.2%
35 to 54 (n=329)	76.1%
55 plus (n=493)	76.3%

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

**QUESTION** – Are you concerned, somewhat concerned, somewhat not concerned or not concerned about Trump's claim that the trade dispute is going to cost Canadians a lot of money?

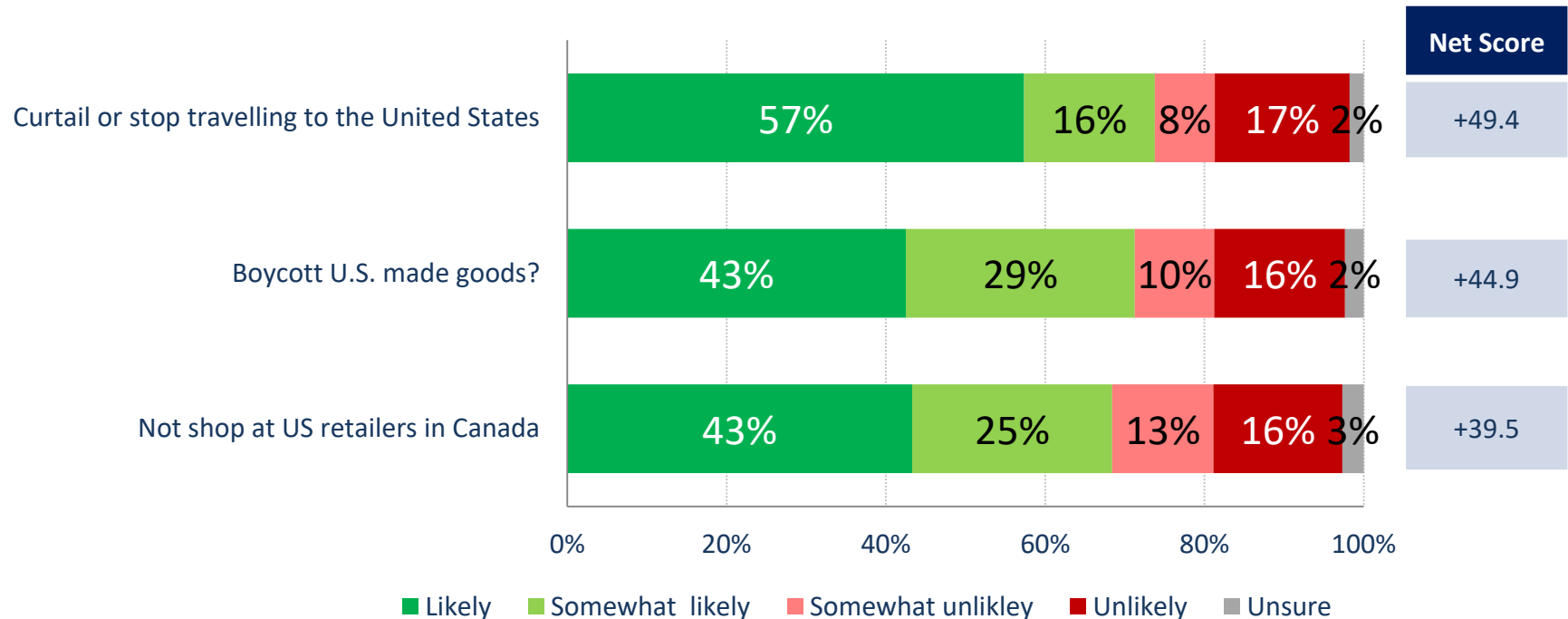


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# Impact of US – Canada trade war

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm$  3.1 percentage points plus or minus, 19 times out of 20.



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

**QUESTION** – Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]



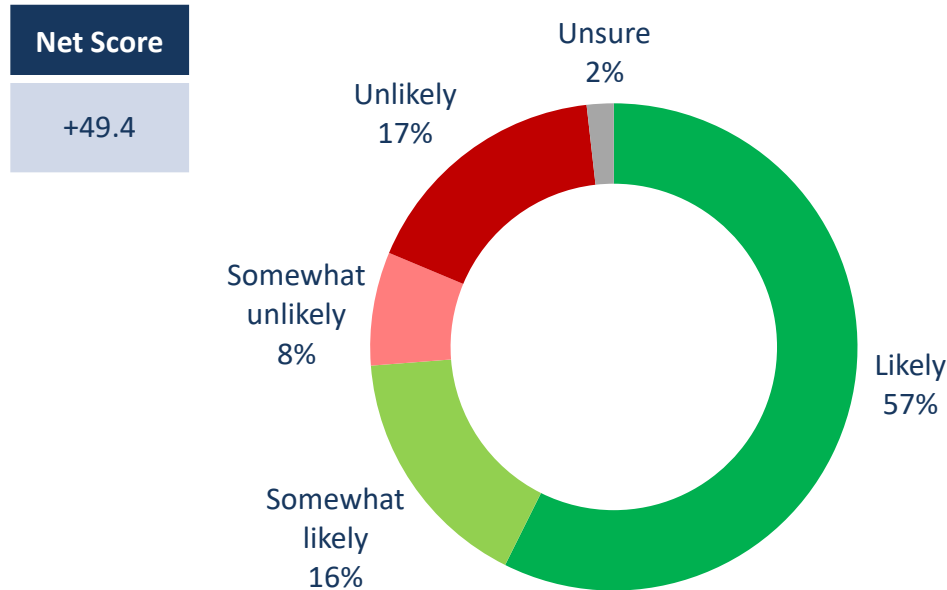
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# Curtailment or stopping travel to US

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



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

Subgroups	Likely/ Somewhat likely
Atlantic (n=100)	74.4%
Quebec (n=250)	82.4%
Ontario (n=300)	75.3%
Prairies (n=200)	58.5%
British Columbia (n=150)	76.3%
Male (n=520)	69.6%
Female (n=480)	77.8%
18 to 34 (n=178)	73.1%
35 to 54 (n=329)	71.2%
55 plus (n=493)	76.4%

**QUESTION** – Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

**Curtail or stop travelling to the United States?**

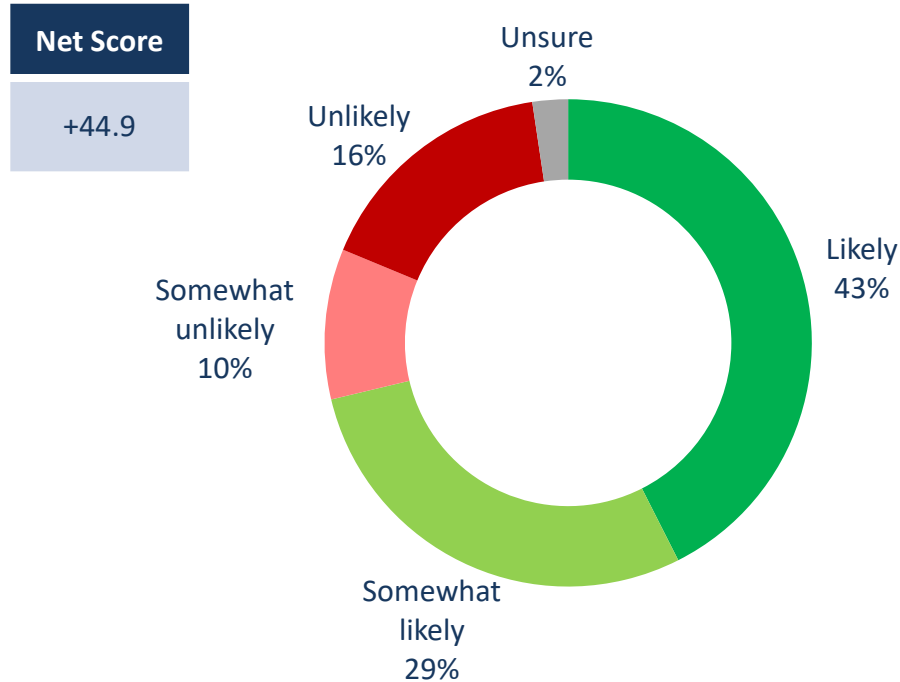


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# Boycott US made goods

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



Subgroups	Likely/ Somewhat likely
Atlantic (n=100)	76.3%
Quebec (n=250)	80.7%
Ontario (n=300)	70.6%
Prairies (n=200)	57.4%
British Columbia (n=150)	71.8%
Male (n=520)	66.8%
Female (n=480)	75.5%
18 to 34 (n=178)	64.3%
35 to 54 (n=329)	68.2%
55 plus (n=493)	78.8%

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

**QUESTION** – Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

**Boycott U.S. made goods?**

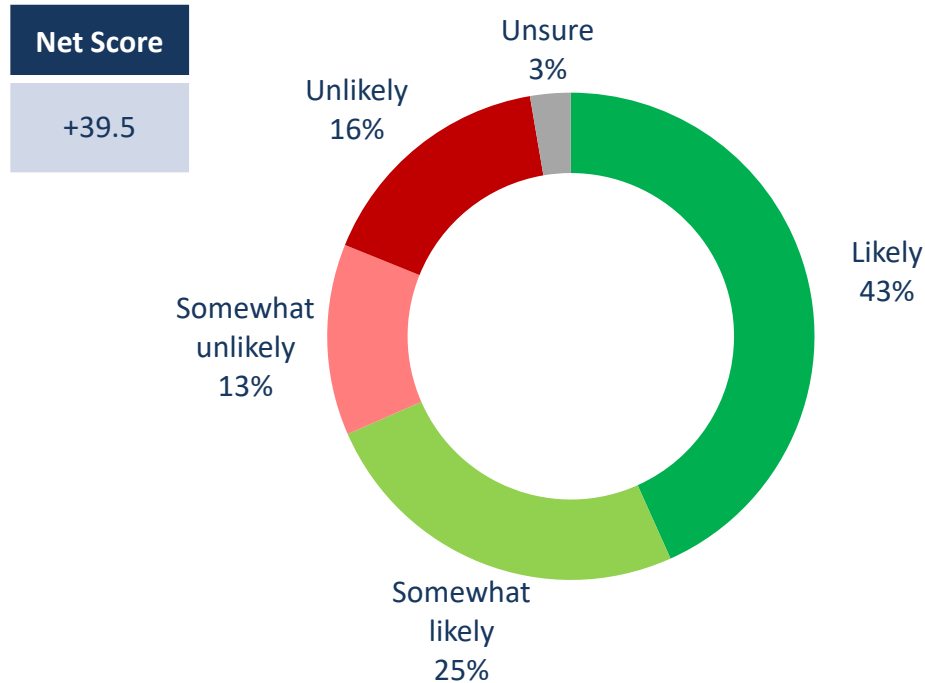


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# Stop shopping at US retailers in Canada

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



Subgroups	Likely/ Somewhat likely
Atlantic (n=100)	72.8%
Quebec (n=250)	78.9%
Ontario (n=300)	65.7%
Prairies (n=200)	57.4%
British Columbia (n=150)	68.3%
Male (n=520)	62.9%
Female (n=480)	73.8%
18 to 34 (n=178)	56.9%
35 to 54 (n=329)	67.8%
55 plus (n=493)	77.1%

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

**QUESTION** – Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

**Not shop at US retailer in Canada?**



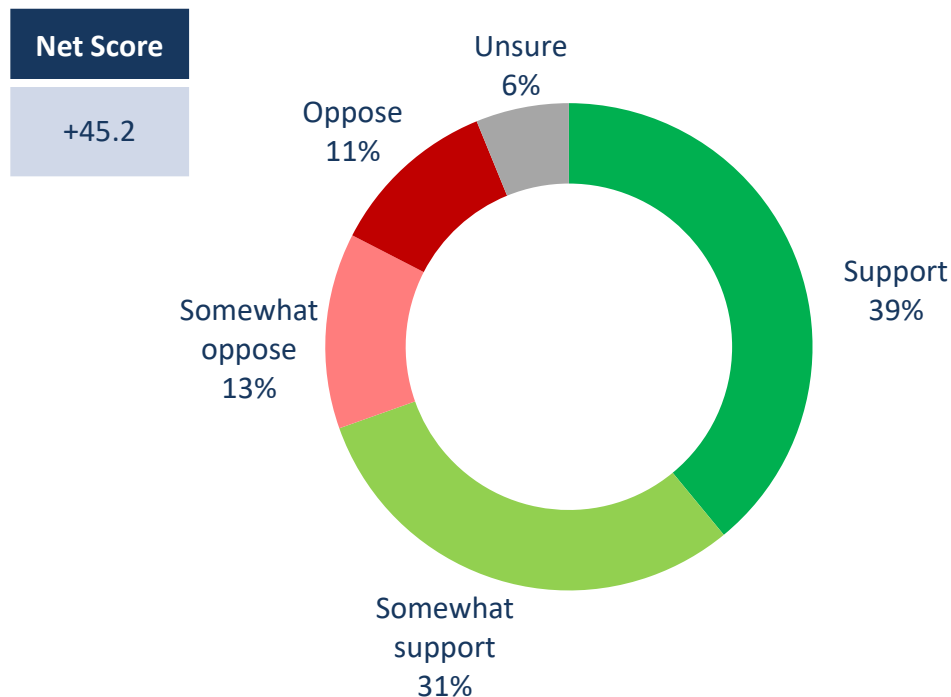
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# Support of government aid to steel and aluminium companies affected by US tariffs

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm$  3.1 percentage points plus or minus, 19 times out of 20.



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

Subgroups	Support/ Somewhat support
Atlantic (n=100)	68.7%
Quebec (n=250)	79.7%
Ontario (n=300)	69.4%
Prairies (n=200)	57.2%
British Columbia (n=150)	70.1%
Male (n=520)	66.8%
Female (n=480)	72.2%
18 to 34 (n=178)	70.2%
35 to 54 (n=329)	64.6%
55 plus (n=493)	73.5%

**QUESTION** – The U.S. has imposed higher tariffs on steel and aluminum coming into the country through Canada, Mexico and the European Union. Canada responded with counter tariffs on the same metals. Do you support, somewhat support, somewhat oppose or oppose the government providing financial aid to the steel and aluminum companies affected by US tariffs?



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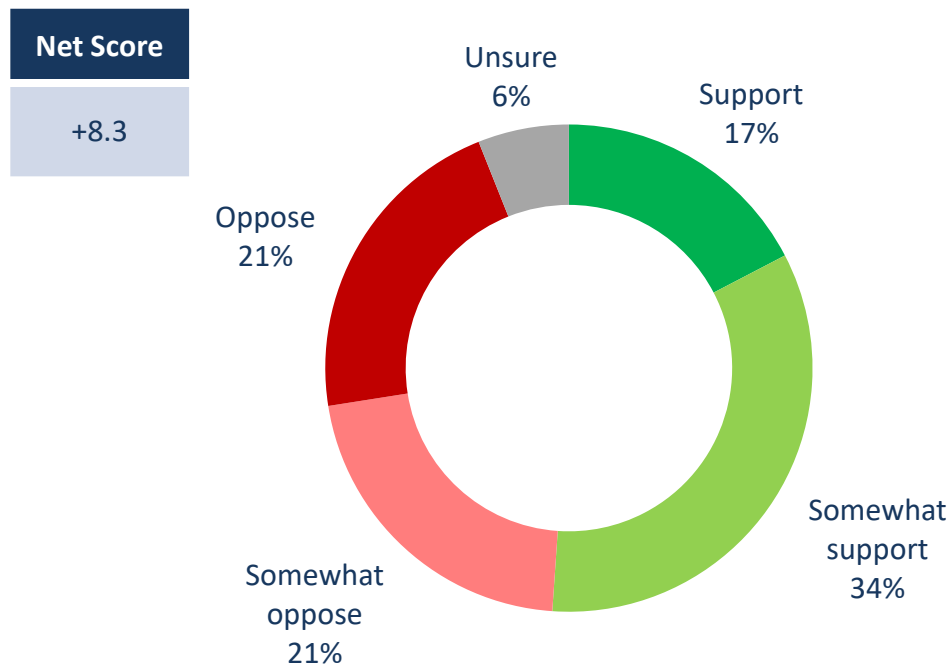


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# Support of financial aid to automobile companies affected by the tariffs

Source: The Globe and Mail/CTV/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 26<sup>th</sup> to June 28<sup>th</sup>, 2018, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



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

Subgroups	Support/ Somewhat support
Atlantic (n=100)	55.3%
Quebec (n=250)	51.6%
Ontario (n=300)	53.5%
Prairies (n=200)	41.1%
British Columbia (n=150)	55.9%
Male (n=520)	46.4%
Female (n=480)	55.6%
18 to 34 (n=178)	53.0%
35 to 54 (n=329)	43.5%
55 plus (n=493)	56.4%

**QUESTION** – If the U.S. imposes tariffs on autos imported from Canada, would you support, somewhat support, somewhat oppose or oppose the government providing financial aid to automobile companies affected by US tariffs?



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# 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 26<sup>th</sup> and June 28<sup>th</sup>, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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  $\pm 3.1$  percentage points, 19 times out of 20.

The research was commissioned by The Globe and Mail and CTV News and was conducted by Nanos Research.

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



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# Technical Note

Element	Description
Organization who commissioned the research	The Globe and Mail and CTV News
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 omnibus 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 26 <sup>th</sup> to 28 <sup>th</sup> , 2018.
Language of Survey	The survey was conducted in both English and French.
Standards	This report meets the standards set forth by the MRIA which can be found here: <a href="https://mria-arim.ca/polling">https://mria-arim.ca/polling</a>

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2016) 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 (2016) 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	10 percent, consistent with industry norms.
Question Order	This research report was divided into two parts. The question order can be found in the original set of questionnaires appended at the end of this report.
Question Content	This was module one of an omnibus survey. This is report one out of two, the first report contained questions on the relationship between the U.S. and Canada.
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. <a href="http://www.nanos.co">http://www.nanos.co</a> Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.

# About Nanos

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## Tabulations

## 2018-1227/1229 – CTV/Globe/Nanos Survey – Trade War – STAT SHEET

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Are you concerned, somewhat concerned, somewhat not concerned or not concerned about Trump's claim that the trade dispute is going to cost Canadians a lot of money?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Concerned	%	37.9	39.4	31.9	38.8	46.0	34.2	35.6	40.1	27.3	40.3	43.2
	Somewhat concerned	%	34.5	32.8	41.9	34.0	26.8	34.6	33.3	35.7	34.9	35.8	33.1
	Somewhat not concerned	%	14.2	8.1	15.9	13.6	13.2	18.2	15.4	13.1	17.5	12.4	13.6
	Not concerned	%	12.1	17.7	9.4	11.9	13.6	11.5	15.0	9.4	18.1	10.5	9.5
	Unsure	%	1.2	1.9	0.8	1.7	0.4	1.5	0.7	1.7	2.2	1.0	0.7

### Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Curtail or stop travelling to the United States?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Likely	%	57.4	62.4	64.2	59.1	41.3	60.5	54.0	60.6	57.2	55.8	58.8
	Somewhat likely	%	16.4	12.0	18.2	16.2	17.2	15.8	15.6	17.2	15.9	15.4	17.6
	Somewhat unlikely	%	7.5	10.9	2.9	7.1	10.9	9.5	8.2	6.9	9.6	8.0	5.7
	Unlikely	%	16.9	10.9	14.4	16.0	26.6	14.2	21.3	12.7	14.4	19.7	16.2
	Unsure	%	1.8	3.8	0.4	1.6	4.1	0.0	0.9	2.6	2.9	1.1	1.6

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 26<sup>th</sup> and June 28<sup>th</sup>, 2018. The margin of error for a random survey of 1,000 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

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## 2018-1227/1229 – CTV/Globe/Nanos Survey – Trade War – STAT SHEET

Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Boycott U.S. made goods?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Likely	%	42.5	41.5	53.5	41.4	28.5	45.5	40.9	44.0	35.1	39.2	50.5
	Somewhat likely	%	28.8	34.8	27.2	29.2	28.9	26.3	25.9	31.5	29.2	29.0	28.3
	Somewhat unlikely	%	10.0	8.6	6.2	10.9	13.1	11.1	10.6	9.4	14.2	11.9	5.4
	Unlikely	%	16.4	13.1	11.2	16.6	24.3	16.3	20.9	12.1	19.3	17.5	13.5
	Unsure	%	2.4	1.9	1.9	1.8	5.1	0.8	1.7	3.0	2.3	2.4	2.3

Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

			Region						Gender		Age		
			Total	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Not shop at US retailers in Canada?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Likely	%	43.3	39.4	53.9	44.4	28.8	45.3	41.5	45.0	31.9	42.6	51.9
	Somewhat likely	%	25.1	33.4	25.0	21.3	28.6	23.0	21.4	28.8	25.0	25.2	25.2
	Somewhat unlikely	%	12.7	17.5	6.7	14.9	14.3	12.7	13.4	12.0	19.6	13.3	7.4
	Unlikely	%	16.2	7.8	12.8	17.1	22.8	16.7	21.5	11.1	18.4	17.6	13.5
	Unsure	%	2.7	1.9	1.5	2.2	5.4	2.4	2.3	3.1	5.1	1.4	2.1

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# 2018-1227/1229 – CTV/Globe/Nanos Survey – Trade War – STAT SHEET

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
The U.S. has imposed higher tariffs on steel and aluminum coming into the country through Canada, Mexico and the European Union. Canada responded with counter tariffs on the same metals. Do you support, somewhat support, somewhat oppose or oppose the government providing financial aid to the steel and aluminum companies affected by US tariffs?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	39.0	37.5	58.9	36.9	24.1	31.0	39.3	38.8	40.2	36.1	40.8
	Somewhat support	%	30.5	31.2	20.8	32.5	33.1	39.1	27.5	33.4	30.0	28.5	32.7
	Somewhat oppose	%	13.0	11.8	9.6	13.6	17.3	12.6	14.7	11.3	12.5	15.6	11.0
	Oppose	%	11.3	12.0	4.4	10.9	19.7	11.5	14.8	7.8	9.4	13.1	11.0
	Unsure	%	6.2	7.5	6.2	6.2	5.8	5.7	3.7	8.6	8.0	6.6	4.5

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
If the U.S. imposes tariffs on autos imported from Canada, would you support, somewhat support, somewhat oppose or oppose the government providing financial aid to automobile companies affected by US tariffs?	Total	Unwgt N	1000	100	250	300	200	150	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	17.4	24.3	15.2	17.2	13.1	22.3	16.2	18.4	19.7	14.7	18.0
	Somewhat support	%	33.7	31.0	36.4	36.3	28.0	33.6	30.2	37.2	33.3	28.8	38.4
	Somewhat oppose	%	21.4	14.0	25.3	23.2	20.2	18.0	21.7	21.2	18.3	24.8	20.6
	Oppose	%	21.4	22.7	16.0	18.6	33.3	19.6	27.6	15.5	21.5	25.8	17.6
	Unsure	%	6.0	7.9	7.1	4.7	5.4	6.5	4.2	7.8	7.3	5.9	5.3

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## Questionnaire





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 **NANOS SURVEY**

**Client:** 2018-1229/27 CTV and Globe June  
**Field:** Nanos Canada Omnibus, NATIONAL n=1,000. Randomly recruited by telephone, dual frame land- and cell-line RDD sample with live agents, administered online.  
**Accuracy:** Margin of error  $\pm 3.1$  percentage points, 19 times out of 20.  
**Budget:** Monthly Budget

Redacted Questions will be released within in seven days.

1. 
2. 
3. Are you concerned, somewhat concerned, somewhat not concerned or not concerned about Trump's claim that the trade dispute is going to cost Canadians a lot of money?  
 Concerned.....1  
 Somewhat concerned .....2  
 Somewhat not concerned .....3  
 Not concerned .....4  
 Unsure.....77

Are you likely, somewhat likely, somewhat unlikely or unlikely to do each of the following if there is a trade war between the two countries? [ROTATE]

4. Curtail or stop travelling to the United States?
5. Boycott U.S. made goods?
6. Not shop at US retailers in Canada?  
 Likely.....1  
 Somewhat likely .....2  
 Somewhat unlikely.....3  
 Unlikely .....4  
 Unsure.....77

7.

[REDACTED]

The U.S. has imposed higher tariffs on steel and aluminum coming into the country through Canada, Mexico and the European Union. Canada responded with counter tariffs on the same metals.

8. Do you support, somewhat support, somewhat oppose or oppose the government providing financial aid to the steel and aluminum companies affected by US tariffs?
9. If the U.S. imposes tariffs on autos imported from Canada, would you support, somewhat support, somewhat oppose or oppose the government providing financial aid to automobile companies affected by US tariffs?

10.

[REDACTED]