

Majority of Canadians like Trudeau's comments that Canada won't be pushed around

Part 2 of 2 – Survey Summary

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



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NEWS

Summary

When asked about the relationship between Canada and the United States, a majority of Canadians say Trudeau's announcement that Canada would not be pushed around by the U.S. was a good idea and approve or somewhat approve Trudeau's handling of trade relations with Donald Trump.

- **A majority of Canadians say that ongoing diplomatic outreach is an effective or somewhat effective way to change the U.S. position on tariffs and trade** – When asked if Canada's ongoing outreach to lawmakers and businesses in the United States is an effective strategy to change the U.S. position on tariffs and trade, more than half of Canadians say it is an effective (15%) or somewhat effective (41%) strategy, while 32 per cent say this is somewhat ineffective (18%) or ineffective (14%). Twelve per cent are unsure.
- **A majority of Canadians say Trudeau's statement following the G7 summit was a good or somewhat good idea** – Three in four Canadians say that Trudeau's statement following the G7 summit that Canada would not be pushed around by the U.S. was a good (53%) or somewhat good (23%) idea. Twenty-two per cent think this announcement was a bad (13%) or a somewhat bad (nine per cent) idea. Three per cent are unsure.
- **A majority of Canadians are confident or somewhat confident that Canada can protect its economic interests if NAFTA is renegotiated** – Just over six in ten Canadians say they are confident (19%) or somewhat confident (42%) that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated. Over one in three are somewhat not confident (22%) or not confident (14%) that Canada can do so. Three per cent are unsure.
- **Just over seven in ten Canadians approve or somewhat approve of Justin Trudeau's handling of trade relations with Donald Trump** - When asked about Justin Trudeau's handling of trade relations with Donald Trump, 71 per cent of Canadians say they approve (39%) or somewhat approve (32%) of it. One in four Canadians somewhat disapprove (nine per cent) or disapprove (17%) of it. Four per cent are unsure.

These observations are based on a 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 26th and 28th, 2018 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.

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

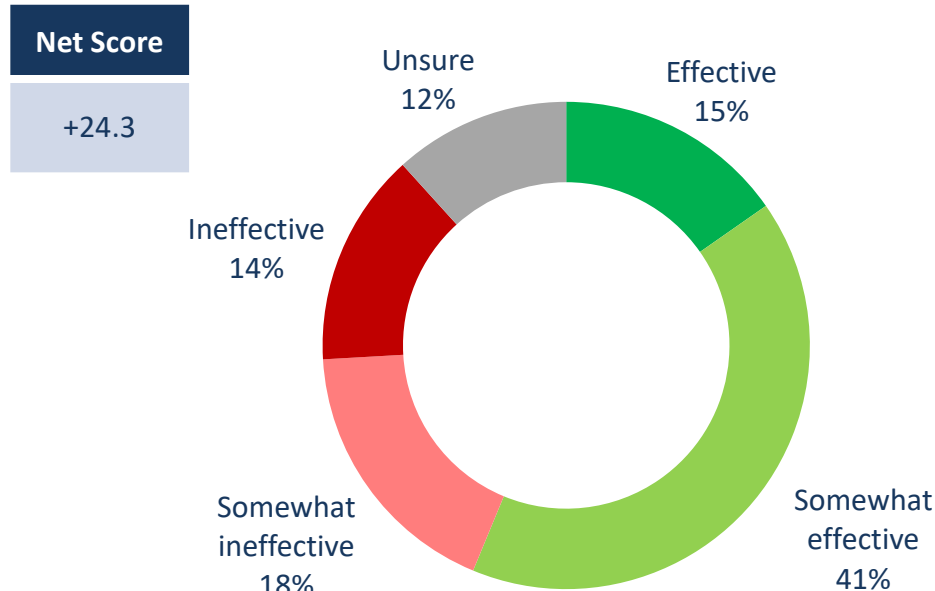


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 **NANOS SURVEY**

Effectiveness of Canadian diplomatic strategies

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



Subgroups	Effective/ Somewhat effective
Atlantic (n=100)	61.5%
Quebec (n=250)	57.1%
Ontario (n=300)	58.6%
Prairies (n=200)	49.0%
British Columbia (n=150)	56.2%
Male (n=520)	58.1%
Female (n=480)	54.4%
18 to 34 (n=178)	54.3%
35 to 54 (n=329)	47.6%
55 plus (n=493)	65.2%

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

QUESTION – Is Canada’s ongoing diplomatic outreach to lawmakers and businesses in the United States an effective, somewhat effective, somewhat ineffective, or ineffective way to change the U.S. position on tariffs and trade?

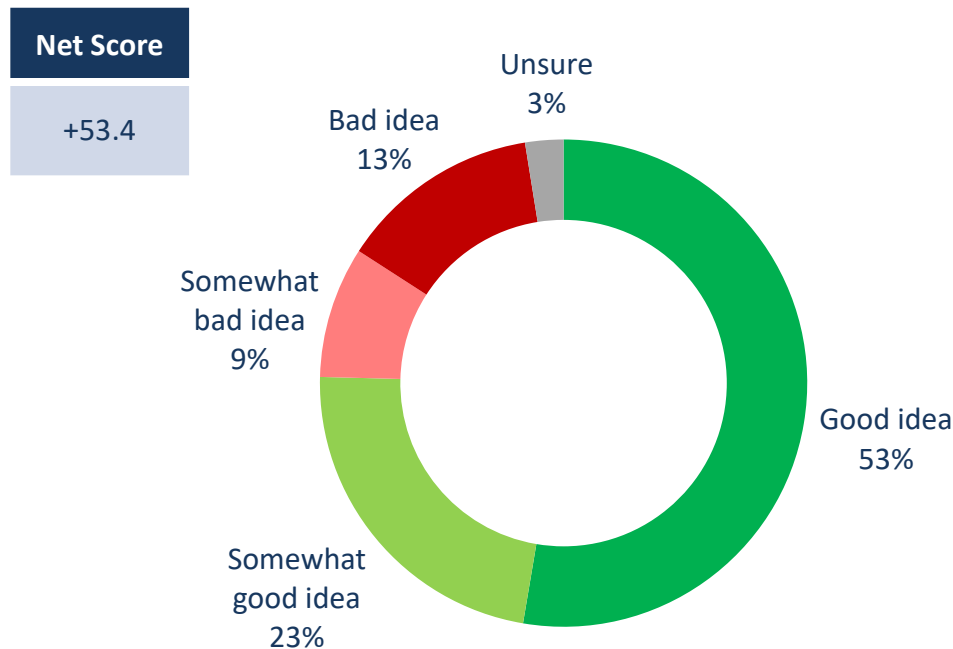


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NANOS SURVEY

Opinions on Trudeau's G7 announcement

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



Subgroups	Good idea/ Somewhat good idea
Atlantic (n=100)	81.0%
Quebec (n=250)	78.3%
Ontario (n=300)	74.1%
Prairies (n=200)	66.2%
British Columbia (n=150)	81.5%
Male (n=520)	71.5%
Female (n=480)	79.2%
18 to 34 (n=178)	77.4%
35 to 54 (n=329)	70.9%
55 plus (n=493)	78.0%

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

QUESTION – After the recent G7 summit in Canada, Trudeau said that Canada would not be pushed around by the U.S. Do you think Trudeau's announcement was a good idea, somewhat good idea, somewhat bad idea or bad idea?



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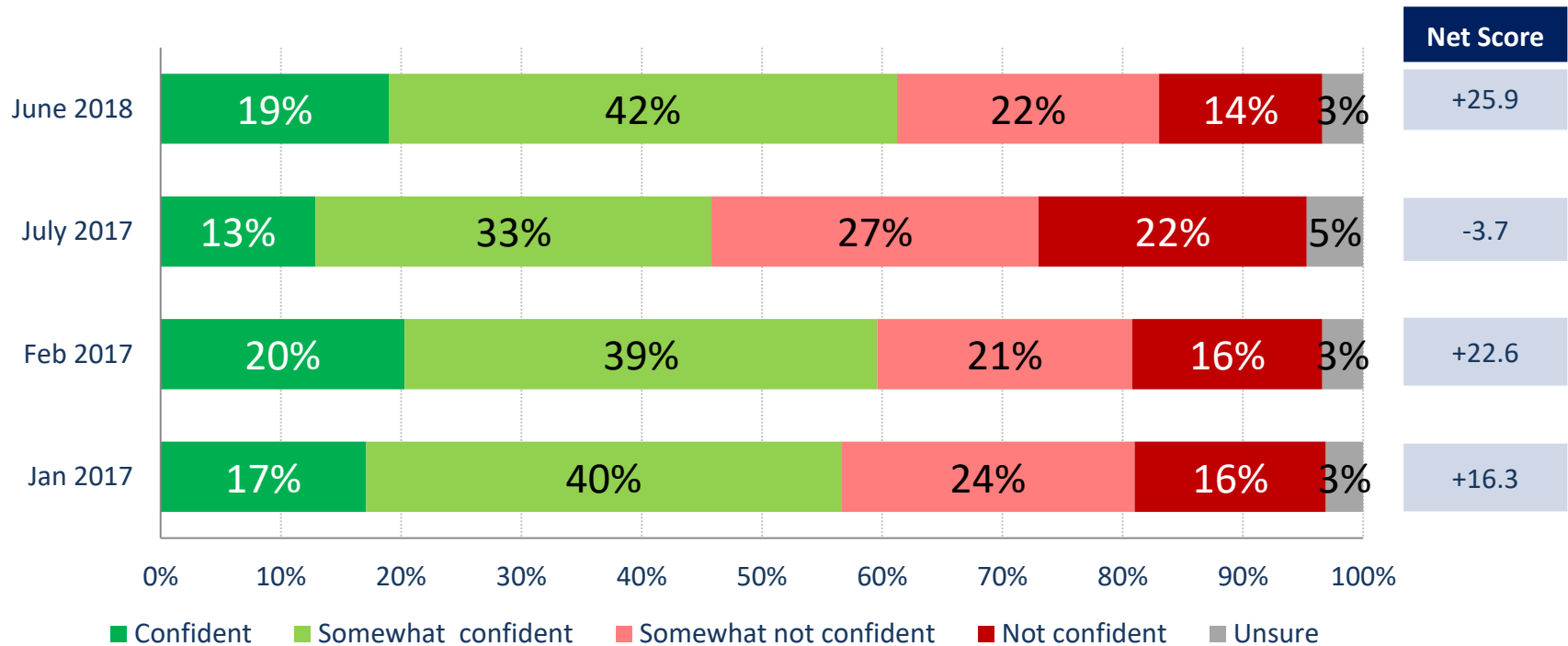
Protecting Canada's economic interests

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

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, February 25th to 28th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

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.



***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?

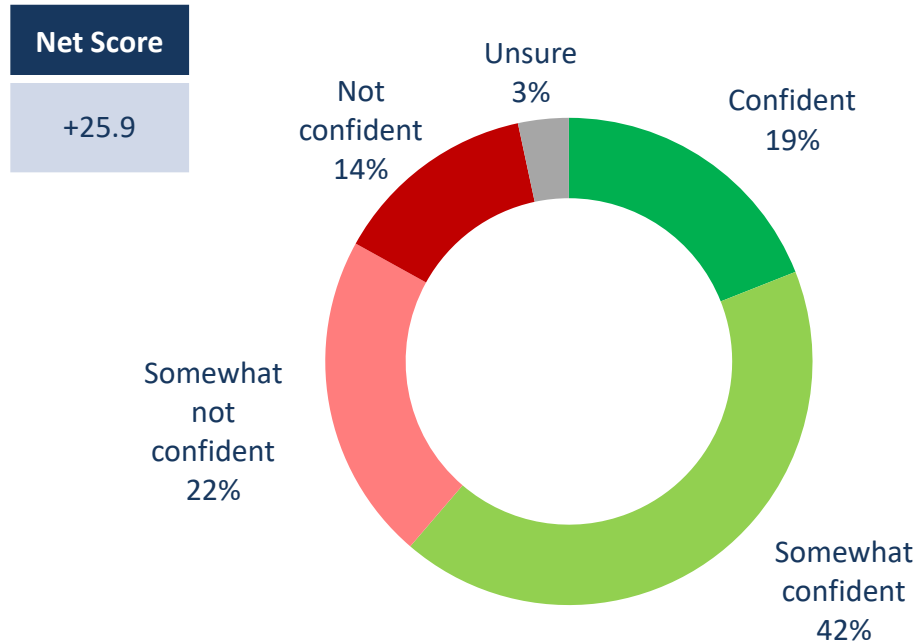


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NANOS SURVEY

Protecting Canada's economic interests

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



Subgroups	Confident/ Somewhat confident
Atlantic (n=100)	66.4%
Quebec (n=250)	61.2%
Ontario (n=300)	64.3%
Prairies (n=200)	52.1%
British Columbia (n=150)	64.2%
Male (n=520)	59.9%
Female (n=480)	62.6%
18 to 34 (n=178)	63.8%
35 to 54 (n=329)	58.2%
55 plus (n=493)	62.2%

***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?

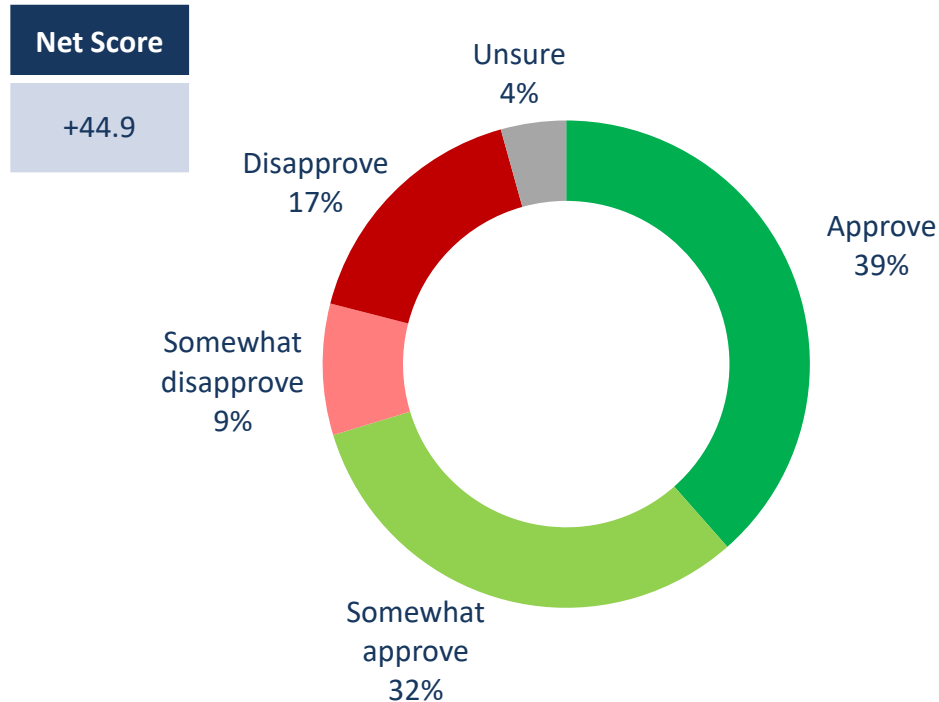


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NANOS SURVEY

Trudeau handling of trade relations with Trump

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



Subgroups	Approve/ Somewhat approve
Atlantic (n=100)	75.3%
Quebec (n=250)	76.7%
Ontario (n=300)	72.6%
Prairies (n=200)	54.7%
British Columbia (n=150)	72.4%
Male (n=520)	66.4%
Female (n=480)	74.1%
18 to 34 (n=178)	70.2%
35 to 54 (n=329)	64.8%
55 plus (n=493)	75.2%

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

QUESTION – Do you approve, somewhat approve, somewhat disapprove, or disapprove of Justin Trudeau’s handling of trade relations with Donald Trump?



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NANOS SURVEY



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 26th and 28th, 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 ± 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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 **NANOS SURVEY**

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	The Globe and Mail and CTV News	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
Final Sample Size	1000 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 lines 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 (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.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	10 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	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.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This was module one of an omnibus survey. This is report two of two, the second report contains questions on the US-Canada trade war.
Number of Calls	Maximum of five call backs.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	June 26 th to June 28 th , 2018.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
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: https://mria-arim.ca/polling		

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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North America Toll-free

1.888.737.5505

info@nanosresearch.com



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 **NANOS SURVEY**



Tabulations

2018-1227/1229 – CTV/Globe/Nanos Survey – Relationship with US - STAT SHEET

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Is Canada's ongoing diplomatic outreach to lawmakers and businesses in the United States an effective, somewhat effective, somewhat ineffective, or ineffective way to change the U.S. position on tariffs and trade?	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
	Effective	%	15.3	18.8	16.7	16.4	11.0	14.1	16.4	14.2	12.5	13.9	18.5
	Somewhat effective	%	41.0	42.7	40.4	42.2	38.0	42.1	41.7	40.2	41.8	33.7	46.7
	Somewhat ineffective	%	17.8	12.9	22.4	18.3	18.0	12.7	15.9	19.7	16.5	20.2	16.7
	Ineffective	%	14.2	14.5	6.9	12.8	22.2	18.2	16.7	11.8	14.5	17.2	11.3
	Unsure	%	11.7	11.1	13.6	10.4	10.8	12.9	9.2	14.1	14.7	15.0	6.7

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
After the recent G7 summit in Canada, Trudeau said that Canada would not be pushed around by the U.S. Do you think Trudeau's announcement was a good idea, somewhat good idea, somewhat bad idea or bad idea?	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
	Good idea	%	52.7	56.6	54.0	54.8	38.7	62.1	52.1	53.2	50.6	48.6	57.7
	Somewhat good idea	%	22.7	24.4	24.3	19.3	27.5	19.4	19.4	26.0	26.8	22.3	20.3
	Somewhat bad idea	%	8.7	8.3	10.9	6.6	10.9	6.7	8.2	9.2	9.1	9.6	7.6
	Bad idea	%	13.3	8.8	8.3	16.7	20.0	9.2	17.8	9.0	11.7	15.5	12.6
	Unsure	%	2.5	1.8	2.5	2.6	2.8	2.6	2.5	2.6	1.8	4.0	1.8

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2018-1227/1229 – CTV/Globe/Nanos Survey – Relationship with US - 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 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	520	480	178	329	493
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Confident	%	19.0	22.3	18.8	22.0	15.6	15.7	21.8	16.3	23.2	16.7	18.1
	Somewhat confident	%	42.3	44.1	42.4	42.3	36.5	48.5	38.1	46.3	40.6	41.5	44.1
	Somewhat not confident	%	21.8	17.3	26.0	22.0	23.5	14.7	22.1	21.4	20.8	24.0	20.4
	Not confident	%	13.6	13.4	7.3	11.1	22.6	17.3	15.5	11.8	12.4	14.3	13.8
	Unsure	%	3.4	2.9	5.4	2.7	1.8	3.7	2.4	4.3	3.0	3.4	3.6

			Region						Gender		Age		
			Canada 2018-06	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Do you approve, somewhat approve, somewhat disapprove, or disapprove of Justin Trudeau's handling of trade relations with Donald Trump?	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
	Approve	%	38.5	49.7	35.3	45.2	26.3	39.2	37.5	39.5	38.2	32.1	44.3
	Somewhat approve	%	31.8	25.6	41.4	27.4	28.4	33.2	28.9	34.6	32.0	32.7	30.9
	Somewhat disapprove	%	8.7	5.5	7.9	7.0	12.9	10.0	7.9	9.5	7.9	10.4	7.8
	Disapprove	%	16.7	13.9	7.6	17.3	30.3	14.1	22.2	11.4	17.4	19.4	13.8
	Unsure	%	4.3	5.3	7.8	3.0	2.2	3.5	3.5	5.1	4.5	5.5	3.2

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 June 26th and June 28th, 2018. 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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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 ± 3.1 percentage points, 19 times out of 20.
Budget: Monthly Budget

1. Is Canada's ongoing diplomatic outreach to lawmakers and businesses in the United States an effective, somewhat effective, somewhat ineffective, or ineffective way to change the U.S. position on tariffs and trade?

Effective	1
Somewhat effective	2
Somewhat ineffective	3
Ineffective	4
Unsure.....	77

2. After the recent G7 summit in Canada, Trudeau said that Canada would not be pushed around by the U.S. Do you think Trudeau's announcement was a good idea, somewhat good idea, somewhat bad idea or bad idea?

Good idea	1
Somewhat good idea.....	2
Somewhat bad idea	3
Bad idea	4
Unsure.....	77

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. 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? [Tracking July 2017]

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. Do you approve, somewhat approve, somewhat disapprove, or disapprove of Justin Trudeau's handling of trade relations with Donald Trump?
- | | |
|---------------------------|----|
| Approve | 1 |
| Somewhat approve | 2 |
| Somewhat disapprove | 3 |
| Disapprove | 4 |
| Unsure..... | 77 |