

# A majority of Canadians say Canada should strongly defend the dairy sector in NAFTA negotiations

Dairy Farmers of Canada Survey Summary – Report 1 of 2

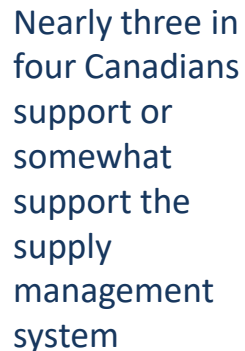
submitted by Nanos to Dairy Farmers of Canada, August 2018

(Submission 2018-1250)



TM/MC

# Summary



Nearly three in four Canadians support or somewhat support the supply management system

The majority of Canadians say they either support or somewhat support the supply management system. Almost two in three Canadians think the government should strongly defend the dairy sector during NAFTA negotiations and just under half of Canadians say the government should defend Canadian farmers and supply management during NAFTA negotiations in the face of targeting from US President Donald Trump rather than make concessions, abandon supply management or ignore the President.

- **Nearly three quarters of Canadians support or somewhat support the supply management system** – Asked their level of support for the general objectives of the supply management system, nearly three in four Canadians say they either support (44%) or somewhat support (29%) it; while 10 per cent either oppose or somewhat oppose it, respectively. Seven per cent are unsure.
- **Canadians most often say the government should defend Canadian farmers and supply management** – Asked what the Canadian government should do in response to US President Donald Trump's targeting of Canadian farmers and the supply management system, nearly half (49%) say the government should defend farmers and supply management, followed by 19 per cent who said they should make concessions but preserve the system, 17 per cent who said ignore Donald Trump and 10 per cent who said abandon supply management. Four per cent were unsure.
- **Almost two in three Canadians say Canada should defend its dairy sector strongly** – Asked to rate on a scale of 1 to 10, where 1 is not at all defend and 10 very strongly defend, how strongly the Canadian government should defend the interests of the Canadian dairy sector in the NAFTA renegotiations, Canadians gave a mean rating of 7.7 out of 10. Nearly two thirds, (62%) said strongly (a rating of eight to 10), 25 per cent gave a neutral rating (a rating of four to seven) and ten per cent said do not defend at all (a rating of one to three). Three per cent are unsure.

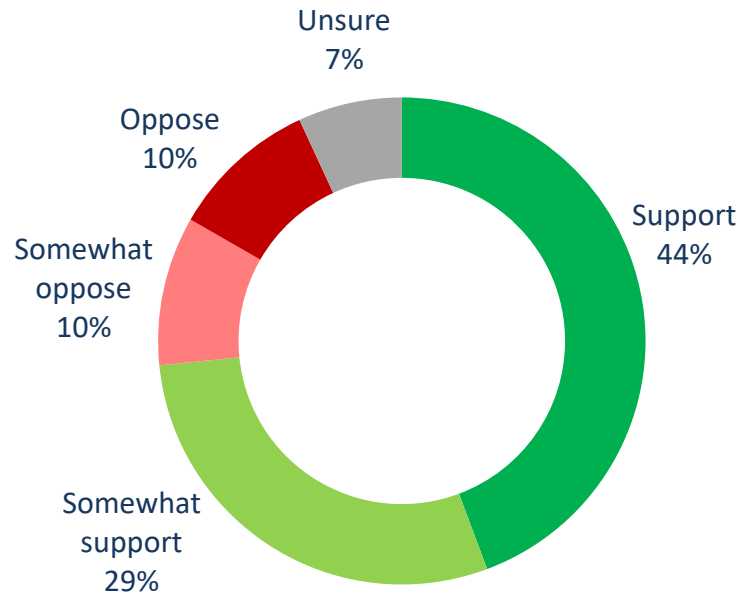
These observations are based on an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between July 30<sup>th</sup> and August 5<sup>th</sup>, 2018 as part of an omnibus survey. The margin of error for a random survey of 1,000 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

This study was commissioned by the Dairy Farmers of Canada and the research was conducted by Nanos Research.

# Support for supply management system

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30<sup>th</sup> and August 5<sup>th</sup>, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

**Net Score**  
**+53.6**



Subgroups	Support/ Somewhat support
Atlantic (n=100)	75.8%
Quebec (n=250)	76.2%
Ontario (n=300)	74.9%
Prairies (n=200)	64.2%
British Columbia (n=150)	76.1%
Male (n=508)	68.0%
Female (n=492)	78.5%
18 to 34 (n=192)	70.7%
35 to 54 (n=349)	70.9%
55 plus (n=459)	77.3%

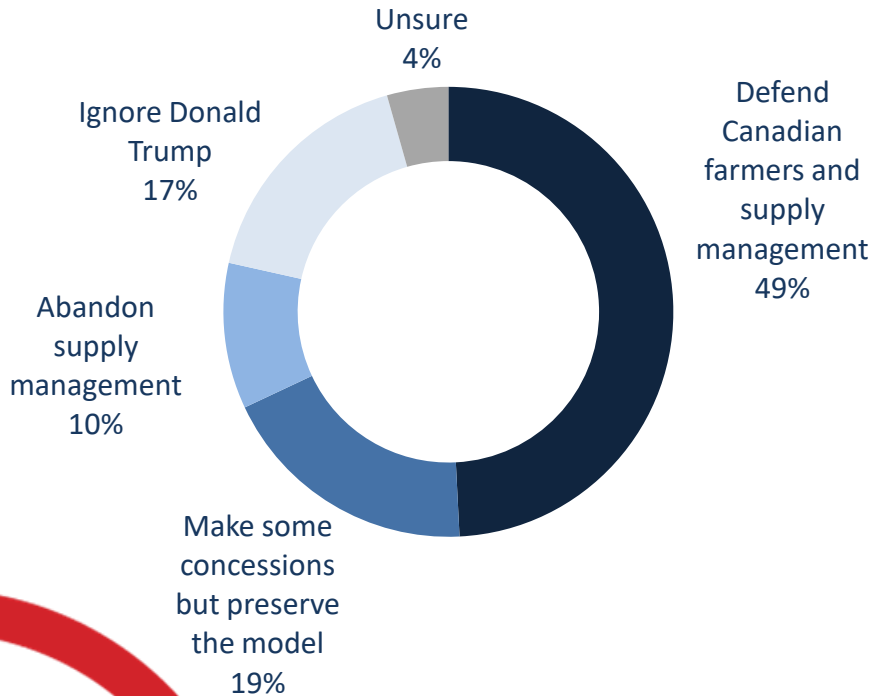
\*Weighted to the true population proportion.

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

**QUESTION** – As you may know, supply management is a system by which Canada's dairy, poultry, and chicken farmers work to ensure a stable supply of their products, lessening price fluctuations, while ensuring a stable income for Canadian farmers. Do you support, somewhat support, somewhat oppose or oppose the general objectives of this system?

# Canadian response to US targeting of Canadian farmers

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30<sup>th</sup> and August 5<sup>th</sup>, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Defend Canadian farmers and supply management
Atlantic (n=100)	61.2%
Quebec (n=250)	52.8%
Ontario (n=300)	54.0%
Prairies (n=200)	37.6%
British Columbia (n=150)	41.2%
Male (n=508)	40.6%
Female (n=492)	57.5%
18 to 34 (n=192)	55.2%
35 to 54 (n=349)	46.2%
55 plus (n=459)	47.7%

\*Weighted to the true population proportion.

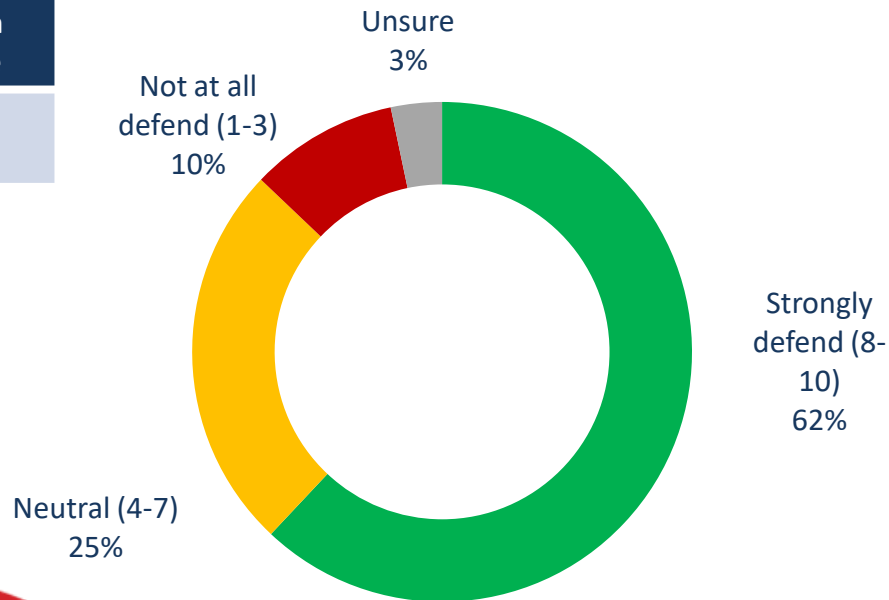
**\*Note:** Charts may not add up to 100 due to rounding

**QUESTION** – During the NAFTA renegotiation, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do? [RANDOMIZE]

# Impressions on how strongly Canada should protect its dairy sector in NAFTA Renegotiations

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 30<sup>th</sup> and August 5<sup>th</sup>, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Mean Score
7.7



Subgroups	Mean Score
Atlantic (n=100)	8.1
Quebec (n=250)	8.3
Ontario (n=300)	7.8
Prairies (n=200)	6.7
British Columbia (n=150)	7.7
Male (n=508)	7.3
Female (n=492)	8.2
18 to 34 (n=192)	7.7
35 to 54 (n=349)	7.6
55 plus (n=459)	7.9

\*Weighted to the true population proportion.

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

**QUESTION** – On a scale of 1 to 10, where 1 is not at all defend and 10 very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy sector in the NAFTA renegotiations?





# 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 July 30<sup>th</sup> and August 5<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 Dairy Farmers of Canada and was conducted by Nanos Research.

This is Report 1 of 2. Report 2 contains questions related to the political impact of support for supply management.

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



# Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Dairy Farmers of Canada	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	±3.1percentage 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	Nine 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.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This was module five of an omnibus survey. Previous modules were about unprompted issues of national concern, NATO/Russia and carbon tax, Trudeau, asylum seekers and interest rates. This is Report 1 of 2 – Report 2 contains questions related to the political impact of supporting supply management.
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	July 30 <sup>th</sup> and August 5 <sup>th</sup> , 2018.	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.
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>		



# 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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Tabulations



## 2018-1250 – Dairy Farmers July – Support for Supply Management - STAT SHEET

			Region						Gender		Age		
			Canada 2018-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – As you may know, supply management is a system by which Canada’s dairy, poultry, and chicken farmers work to ensure a stable supply of their products, lessening price fluctuations, while ensuring a stable income for Canadian farmers. Do you support, somewhat support, somewhat oppose or oppose the general objectives of this system?	Total	Unwgt N	1000	100	250	300	200	150	508	492	192	349	459
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	44.3	47.0	40.2	49.4	39.5	45.4	39.5	48.9	42.7	39.5	49.6
	Somewhat support	%	29.1	28.8	36.0	25.5	24.7	30.7	28.5	29.6	28.1	31.4	27.7
	Somewhat oppose	%	9.9	10.6	9.4	11.0	10.1	8.0	13.1	6.9	9.3	9.3	10.8
	Oppose	%	9.8	6.0	5.6	7.0	20.6	10.7	13.6	6.2	8.5	13.2	7.8
	Unsure	%	6.9	7.6	8.8	7.1	5.2	5.3	5.4	8.4	11.5	6.6	4.1

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 July 30<sup>th</sup> and August 5<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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## 2018-1250 – Dairy Farmers July – Support for Supply Management - STAT SHEET

			Region						Gender		Age		
			Canada 2018-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – During the NAFTA renegotiation, US President Donald Trump has been targeting Canadian farmers and the supply management system. What should the Canadian government do?	Total	Unwgt N	1000	100	250	300	200	150	508	492	192	349	459
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Defend Canadian farmers and supply management	%	49.2	61.2	52.8	54.0	37.6	41.2	40.6	57.5	55.2	46.2	47.7
	Make some concessions but preserve the model	%	18.8	16.1	14.1	20.2	22.3	21.0	22.6	15.1	12.8	16.9	24.6
	Abandon supply management	%	10.5	0.9	6.4	9.3	22.5	10.1	14.9	6.2	8.7	14.3	8.4
	Ignore Donald Trump	%	17.1	15.8	21.5	14.0	13.3	22.2	18.4	15.9	17.0	19.6	15.1
	Unsure	%	4.4	6.0	5.2	2.5	4.3	5.6	3.4	5.3	6.3	3.0	4.2

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			Region						Gender		Age		
			Canada 2018-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – On a scale of 1 to 10, where 1 is not at all defend and 10 very strongly defend, how strongly should the Canadian government defend the interests of the Canadian dairy sector in the NAFTA renegotiations?	Total	Unwgt N	1000	100	250	300	200	150	508	492	192	349	459
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
		Mean	7.7	8.1	8.3	7.8	6.7	7.7	7.3	8.2	7.7	7.6	7.9
	Not at all defend (1)	%	4.8	2.7	0.8	3.8	10.0	7.7	6.8	2.8	3.6	6.7	3.9
	2	%	1.7	0.0	1.4	1.0	5.3	0.0	1.7	1.7	0.4	2.9	1.6
	3	%	3.1	1.2	2.7	3.4	5.5	1.4	4.0	2.2	4.6	3.1	2.1
	4	%	2.9	1.9	1.4	3.4	4.5	3.2	4.7	1.2	1.8	2.8	3.9
	5	%	5.3	5.2	4.6	5.7	6.2	4.6	7.2	3.5	4.2	4.9	6.5
	6	%	5.8	7.3	6.0	6.3	3.5	6.2	6.5	5.0	7.5	4.0	6.2
	7	%	11.1	12.0	12.3	10.9	11.2	9.1	12.3	10.0	12.7	11.2	10.1
	8	%	15.8	16.6	12.9	17.7	16.0	15.8	15.0	16.6	19.3	15.3	13.8
	9	%	9.2	12.7	8.4	8.6	7.1	11.9	7.6	10.7	7.9	9.3	10.0
	Very strongly defend (10)	%	37.0	37.6	46.6	36.5	25.8	36.5	31.9	41.9	30.6	38.2	40.3
	Unsure	%	3.3	2.7	2.7	2.8	4.9	3.5	2.2	4.4	7.5	1.7	1.7

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