A majority of Canadians would look favourably or somewhat favourably on politicians who defend Canada's dairy sector in NAFTA negotiations

Dairy Farmers of Canada Survey Summary – Report 2 of 2

submitted by Nanos to Dairy Farmers of Canada, August 2018
(Submission 2018-1250)

NANOS

DAIRY FARMERS
OF CANADA
QUALITY MILK
LES PRODUCTEURS
LAITIERS DU CANADA
LAIT DE QUALITÉ

TM/MC

Summary

A majority of Canadians would look favourably or somewhat favourably upon politicians who defend Canada's dairy sector during NAFTA negotiations, and just over half of Canadians say they would be less likely to vote for politicians who supported abandoning the supply management system.

Nearly eight in ten Canadians would look favourably or somewhat favourably on politicians who defend Canada's dairy sector in NAFTA negotiations

- **Almost four in five Canadians would look favourably or somewhat favourably on politicians who defend Canada's dairy sector in NAFTA negotiations** – Nearly four in five Canadians would look favourably (50%) or somewhat favourably (29%) on a politician who defends Canada's dairy sector in the NAFTA negotiations against the United States, while eight percent say somewhat unfavourably and six per cent unfavourably. Eight per cent are unsure.

- **More than half of Canadians say they are less likely to vote for federal candidates who would support abandoning supply management** – More than half (56%) of Canadians say they are less likely to vote for federal candidates who would support abandoning supply management in order to get a NAFTA deal with US President Donald Trump, while 14 per cent say they would be more likely to vote for such a candidate. One in five (20%) say this would have no impact on their vote and nine per cent are unsure.

- **Canadians most frequently say Donald Trump has varied reasons for targeting supply management** – Asked why US President Donald Trump has been targeting the Canadian supply management system, 43 per cent of Canadians say it is for all listed reasons, while 19 per cent say he wants more US dairy products sold in Canada, 17 per cent say he wants to undermine the negotiating position of the Canadian government on NAFTA, six per cent say he wants the US to exercise control over Canadian agriculture, five per cent say he wants to keep his name in the news, four per cent say he has a philosophical opposition to supply management. Four per cent are unsure.
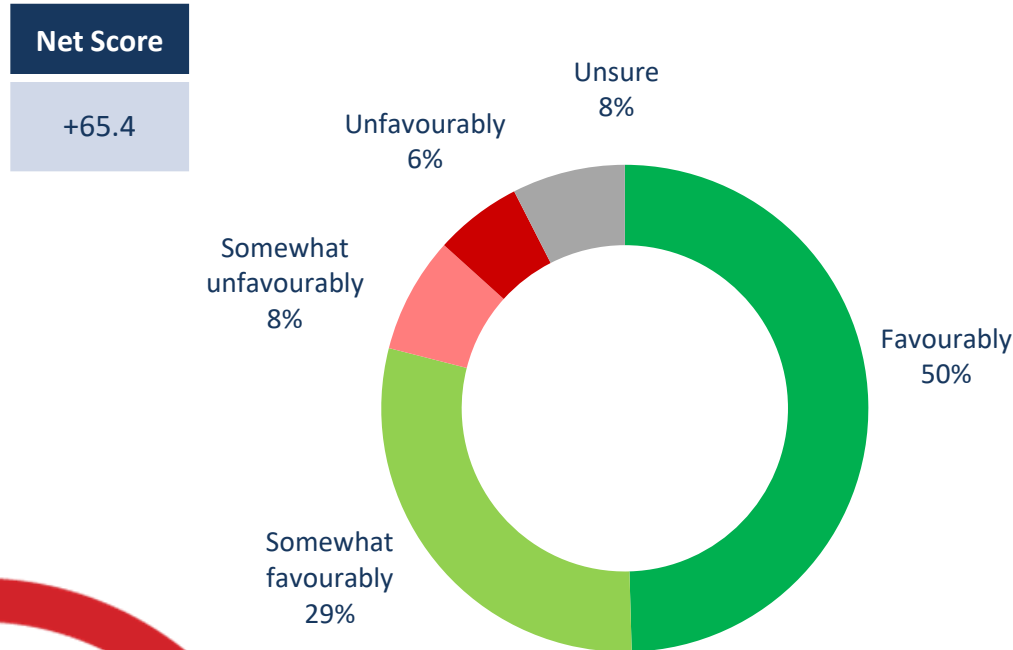
Summary

- **Canadians most often say Maxime Bernier has varied reasons for leading the charge against supply management or that he has multiple reasons, respectively** – Factoring in 'all of the above', Canadians say the top drivers for Maxime Bernier leading the charge against the Canadian supply management system are his philosophical opposition to supply management and wanting to undermine Andrew Scheer. Twenty-seven per cent say it is because he has a philosophical opposition to supply management, while 26 per cent of Canadians say it is for all listed reasons, 13 per cent say he wants to undermine Conservative Leader Andrew Scheer, a supporter of supply management. Eight per cent think he wants to give more leverage to big business over farmers, and five per cent say he wants to keep his name in the news. Nineteen per cent are unsure.

Impressions of Canadian politicians who defend Canada's Dairy Sector in NAFTA renegotiations

Net Score
+65.4

Donut chart:
- Favourably 50%
- Somewhat favourably 29%
- Somewhat unfavourably 8%
- Unfavourably 6%
- Unsure 8%

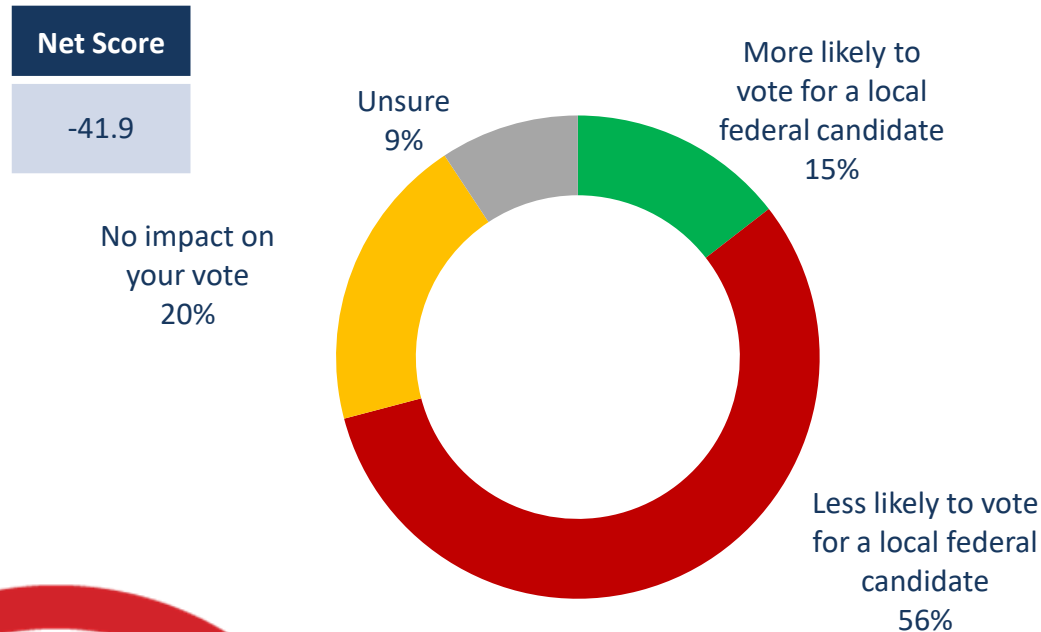| Subgroups	Favourably/ Somewhat favourably
Atlantic (n=100)	82.6%
Quebec (n=250)	83.6%
Ontario (n=300)	81.4%
Prairies (n=200)	66.0%
British Columbia (n=150)	81.2%
Male (n=508)	73.6%
Female (n=492)	84.1%
18 to 34 (n=192)	78.1%
35 to 54 (n=349)	77.9%
55 plus (n=459)	80.4%

*Weighted to the true population proportion.

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

QUESTION – Would you look favourably, somewhat favourably, somewhat unfavourably or unfavourably on a politician who defends Canada's dairy sector in the NAFTA negotiations against the United States?

Impressions on local federal candidates abandoning supply management in order to get a NAFTA deal with the US President

Net Score

-41.9

Unsure
9%

More likely to vote for a local federal candidate
15%

No impact on your vote
20%

Less likely to vote for a local federal candidate
56%

Subgroups	Less likely support a local federal candidate
Atlantic (n=100)	60.4%
Quebec (n=250)	59.8%
Ontario (n=300)	59.1%
Prairies (n=200)	45.4%
British Columbia (n=150)	57.4%
Male (n=508)	51.6%
Female (n=492)	61.1%
18 to 34 (n=192)	50.0%
35 to 54 (n=349)	58.4%
55 plus (n=459)	59.2%

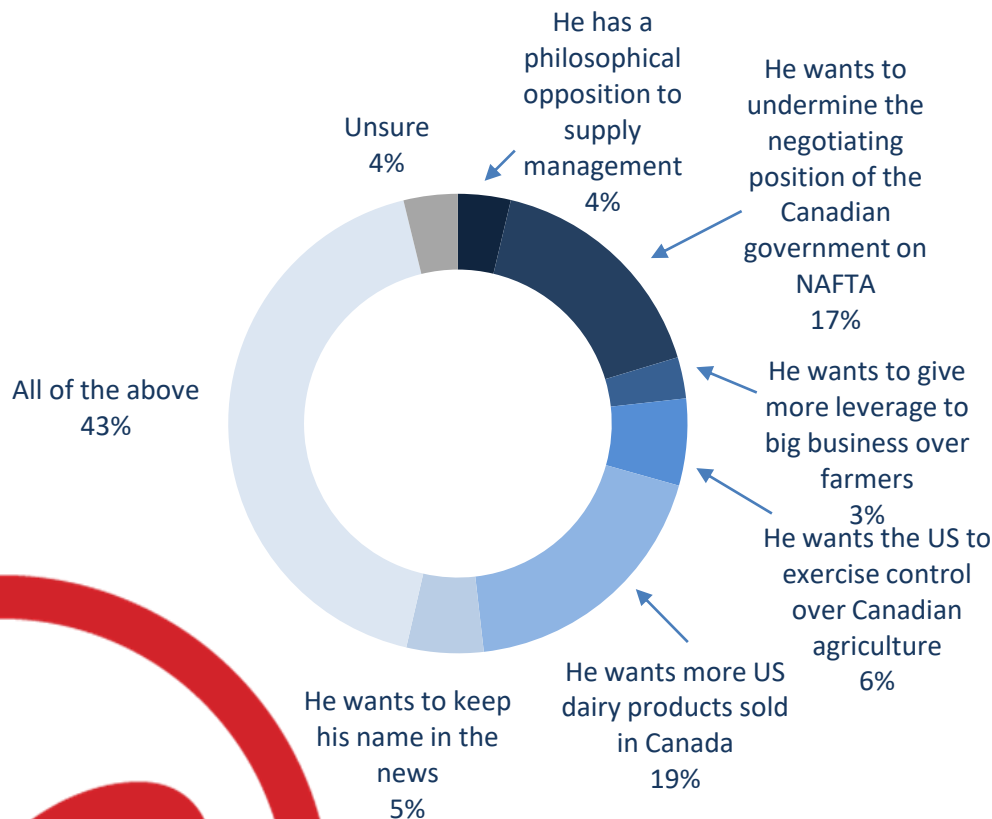*Weighted to the true population proportion.

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

QUESTION – If a local federal candidate supported abandoning supply management in order to get a NAFTA deal with US President Donald Trump, would you be more likely to vote for that local federal candidate, less likely to vote for that local federal candidate or would it have no impact on your vote?

Motivation for Donald Trump targeting the Canadian supply management system

He has a philosophical opposition to supply management
4%

He wants to undermine the negotiating position of the Canadian government on NAFTA
17%

Unsure
4%

All of the above
43%

He wants to give more leverage to big business over farmers
3%

He wants the US to exercise control over Canadian agriculture
6%

He wants to keep his name in the news
5%

He wants more US dairy products sold in Canada
19%

Subgroups	All of the above
Atlantic (n=100)	56.5%
Quebec (n=250)	42.7%
Ontario (n=300)	43.4%
Prairies (n=200)	31.5%
British Columbia (n=150)	45.8%
Male (n=508)	37.7%
Female (n=492)	47.2%
18 to 34 (n=192)	30.3%
35 to 54 (n=349)	44.0%
55 plus (n=459)	49.8%

*Weighted to the true population proportion.

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

QUESTION – US President Donald Trump has been targeting the Canadian supply management system. What, in your opinion, is his MAIN motivation? [RANDOMIZE]

Motivations for Maxime Bernier leading the charge against supply management

He has a philosophical opposition to supply management
27%

He wants to undermine Conservative Leader Andrew Scheer, a supporter of supply management

13%

He wants to give more leverage to big business over farmers
8%

He wants to keep his name in the news
7%

All of the above
26%

Unsure
19%
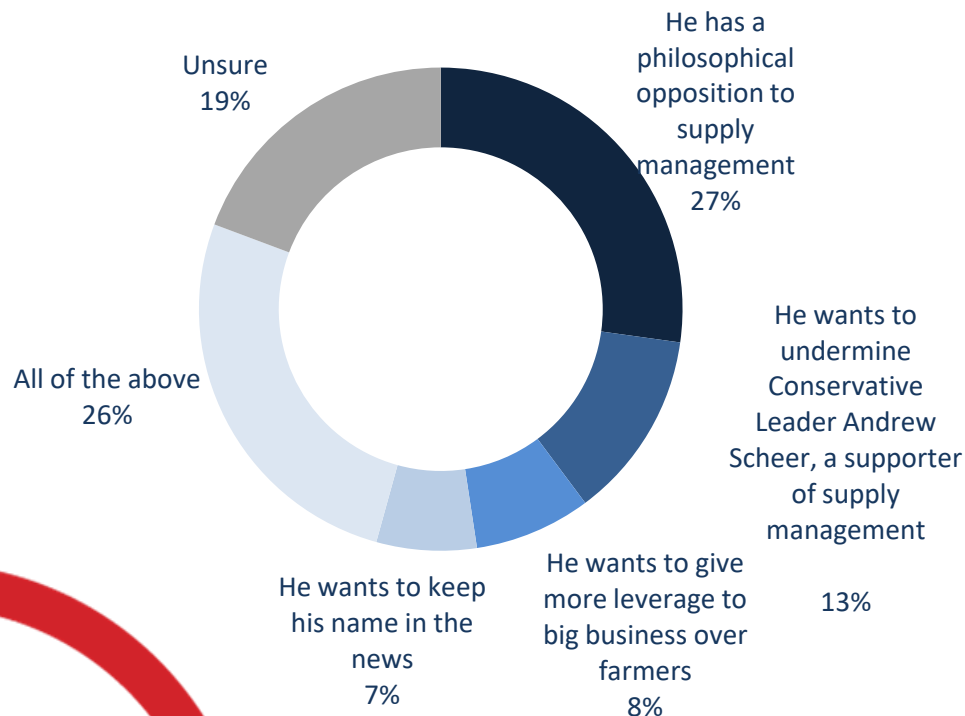
Subgroups	He has a philosophical opposition to supply management
Atlantic (n=100)	19.0%
Quebec (n=250)	26.9%
Ontario (n=300)	26.1%
Prairies (n=200)	34.0%
British Columbia (n=150)	26.5%
Male (n=508)	37.0%
Female (n=492)	17.8%
18 to 34 (n=192)	25.4%
35 to 54 (n=349)	27.7%
55 plus (n=459)	28.1%

*Weighted to the true population proportion.

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

QUESTION – In Canada, Conservative MP and former Leadership candidate Maxime Bernier is leading the charge against supply management. What, in your opinion, is his MAIN motivation? [RANDOMIZE]
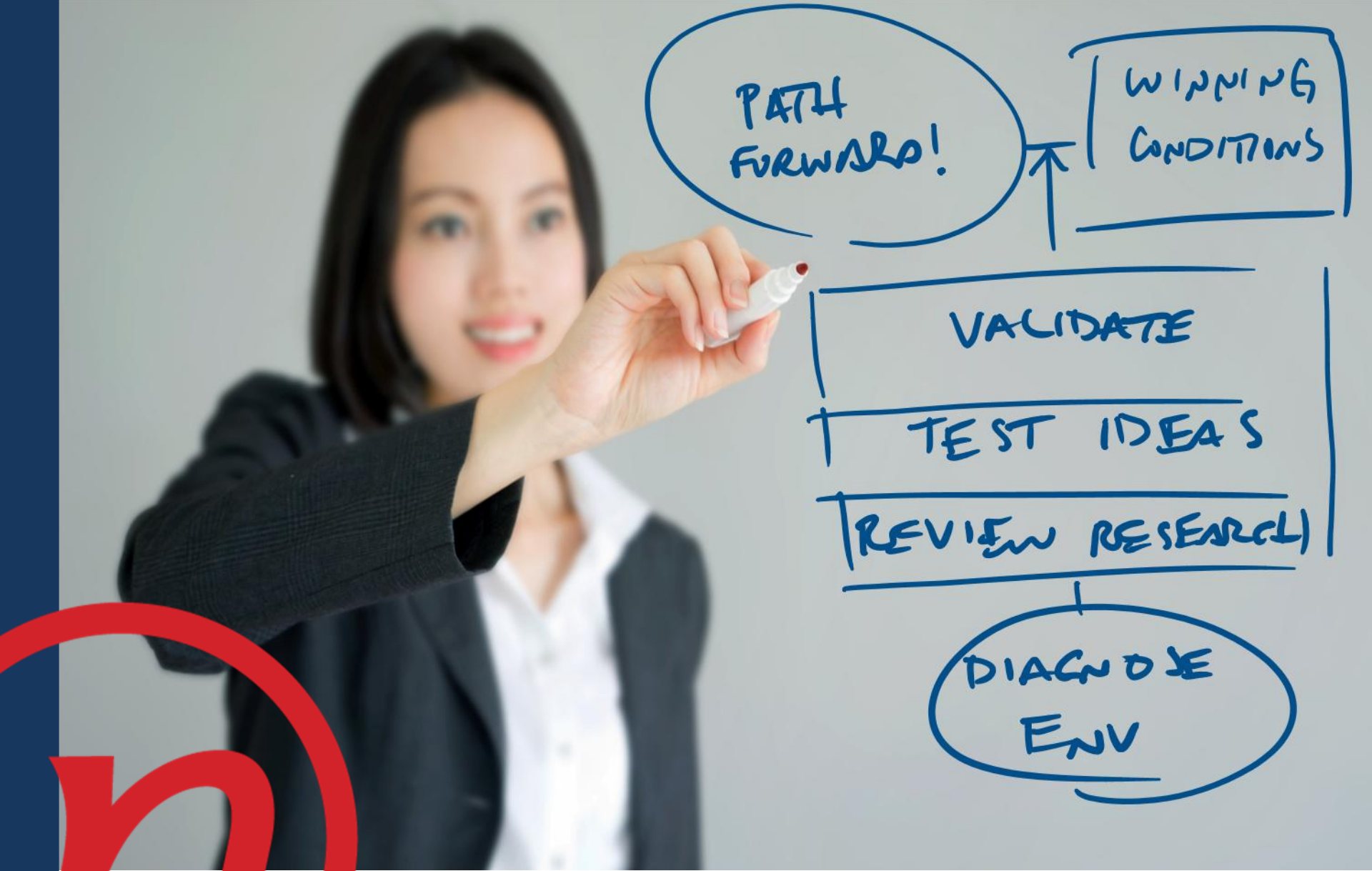
Methodology

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 30th and August 5th, 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 Dairy Farmers of Canada and was conducted by Nanos Research.

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

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

Technical Note

Element	Description
Organization who commissioned the research	Dairy Farmers of Canada
Final Sample Size	1000 Randomly selected individuals.
Margin of Error	±3.1percentage 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	July 30th and August 5th, 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: https://mria-arim.ca/polling

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	Nine percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
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 2 of 2. Report 1 contains questions related to support for supply management.
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. http://www.nanos.co Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.

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 – Political Impact – STAT SHEET

			Canada 2018-07	Region					Gender		Age		
				Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question – Would you look favourably, somewhat favourably, somewhat unfavourably or unfavourably on a politician who defends Canada's dairy sector in the NAFTA negotiations against the United States?	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
	Favourably	%	49.5	52.7	45.6	55.2	41.2	53.6	45.2	53.6	46.0	49.4	52.0
	Somewhat favourably	%	29.4	29.9	38.0	26.2	24.8	27.6	28.4	30.5	32.1	28.5	28.4
	Somewhat unfavourably	%	7.7	5.1	6.3	8.3	12.7	4.1	10.6	5.0	4.5	9.9	8.0
	Unfavourably	%	5.8	0.9	2.6	4.8	12.5	7.7	8.1	3.7	4.8	7.8	4.9
	Unsure	%	7.5	11.4	7.6	5.6	8.7	6.9	7.8	7.2	12.6	4.3	6.7

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 30th and August 5th, 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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2018-1250 – Dairy Farmers July – Political Impact – 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 – If a local federal candidate supported abandoning supply management in order to get a NAFTA deal with US President Donald Trump, would you be more likely to vote for that local federal candidate, less likely to vote for that local federal candidate or would it have no impact on your vote?	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
	More likely support a local federal candidate	%	14.5	8.9	9.6	14.1	24.7	13.4	19.8	9.3	12.1	17.9	13.1
	Less likely support a local federal candidate	%	56.4	60.4	59.8	59.1	45.4	57.4	51.6	61.1	50.0	58.4	59.2
	No impact on your vote	%	19.8	23.0	19.7	19.3	20.3	18.1	21.2	18.4	23.6	16.2	20.3
	Unsure	%	9.3	7.7	10.9	7.6	9.6	11.1	7.4	11.2	14.3	7.5	7.4

					Region					Gender		Age		
			Canada 2018-07	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - US President Donald Trump has been targeting the Canadian supply management system. What, in your opinion, is his MAIN motivation? [Randomize]	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
	He has a philosophical opposition to supply management	%	3.7	0.8	3.3	2.0	7.6	4.7	4.2	3.3	2.5	5.2	3.4
	He wants to undermine the negotiating position of the Canadian government on NAFTA	%	16.6	12.3	17.5	18.2	20.1	10.1	19.6	13.7	19.2	13.5	17.5
	He wants to give more leverage to big business over farmers	%	2.9	2.5	1.8	3.7	2.4	4.2	1.5	4.3	4.8	3.1	1.5
	He wants the US to exercise control over Canadian agriculture	%	6.1	2.9	7.9	4.4	7.9	6.6	5.7	6.6	6.9	7.0	4.9
	He wants more US dairy products sold in Canada	%	18.8	12.5	20.4	17.2	22.0	19.3	23.2	14.6	19.6	21.8	15.7
	He wants to keep his name in the news	%	5.4	7.9	3.9	6.8	3.4	6.2	5.5	5.3	9.2	3.2	4.6
	All of the above	%	42.5	56.5	42.7	43.4	31.5	45.8	37.7	47.2	30.3	44.0	49.8
	Unsure	%	3.8	4.7	2.4	4.4	5.0	3.0	2.7	4.9	7.5	2.2	2.7

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 30th and August 5th, 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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2018-1250 – Dairy Farmers July – Political Impact – 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 - In Canada, Conservative MP and former Leadership candidate Maxime Bernier is leading the charge against supply management. What, in your opinion, is his MAIN motivation? [Randomize]	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
	He has a philosophical opposition to supply management	%	27.2	19.0	26.9	26.1	34.0	26.5	37.0	17.8	25.4	27.7	28.1
	He wants to undermine Conservative Leader Andrew Scheer, a supporter of supply management	%	12.6	11.2	12.1	13.5	12.5	12.9	10.3	14.8	11.5	12.7	13.4
	He wants to give more leverage to big business over farmers	%	7.8	8.1	8.9	6.5	7.7	8.3	6.6	8.9	13.1	6.7	5.0
	He wants to keep his name in the news	%	6.7	11.4	7.6	6.0	5.6	5.0	8.3	5.2	6.8	7.0	6.4
	All of the above	%	26.4	26.9	31.5	25.5	19.2	28.7	24.5	28.1	18.8	26.2	31.8
	Unsure	%	19.3	23.5	13.0	22.3	21.0	18.6	13.2	25.1	24.4	19.7	15.4

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 30th and August 5th, 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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