Majority of Canadians want the Canadian government to create an environment that encourages Canadian jobs in the aerospace industry and to keep Canada's aerospace industry competitive

AIAC Survey Summary - DRAFT

submitted by Nanos to Aerospace Industries Association of Canada, November 2018 (Submission 2018-1313)

Summary

More than nine in ten Canadians support or somewhat support the government creating an environment that encourages Canadian jobs in the aerospace industry and keeps Canada's industry competitive

More than nine in ten Canadians support or somewhat support the Canadian government creating an environment that encourages Canadian jobs in the aerospace industry, and that keeps Canada's aerospace industry competitive, as well as the use of Canadian sub contractors and partner firms for work done in Canada. A majority of Canadians agree or somewhat agree that Canada's aerospace industry is a driver of future economic growth and an important contributor to Canadian research and development, as well as creating the types of jobs that we need in the future. More than one in three Canadians say a federal political party including a cohesive strategy for Canada's aerospace industry in their platform would make them more likely to vote for the party, while six in ten say it would make no difference.

- **More than nine in ten Canadians support or somewhat support the Canadian government creating an environment that encourages Canadian jobs in the aerospace industry** – A majority of Canadians support (65%) or somewhat support (28%) the Government creating an environment that encourages more Canadian jobs in the aerospace industry, while three per cent somewhat oppose this and one per cent oppose it. Three per cent are unsure.

- **A majority of Canadians support or somewhat support the Canadian government creating an environment that keeps Canada's aerospace industry competitive** – Over nine in ten Canadians support (60%) or somewhat support (31%) the Government of Canada creating an environment that keeps Canada's aerospace industry competitive in the global marketplace, whole four per cent somewhat oppose this and one per cent oppose it. Four per cent are unsure.

- **Over nine in ten Canadians support or somewhat support the use of Canadian sub contractors and partner firms for aerospace work conducted in Canada** – The vast majority of Canadians support (71%) or somewhat support (23%) that Canadian sub contractors and Canadian partner firms should be used for aerospace work performed in Canada, such as the maintenance of aircraft and ships as much as possible. Two per cent somewhat oppose this, while one per cent oppose it. Three per cent are unsure.

Summary

More than one in three Canadians say they would be more likely to vote for a federal political party that included a cohesive strategy to grow Canada's aerospace presence in their policy platform

- **More than eight in ten Canadians agree or somewhat agree that Canada's aerospace industry is an important contributor to Canadian research and development** – A majority of Canadians agree (53%) or somewhat agree (35%) that Canada's aerospace industry is an important contributor to Canadian Research and Development, while four per cent somewhat disagree and one per cent disagree. Seven per cent are unsure.

- **Close to eight in ten Canadians agree or somewhat agree that Canada's aerospace industry is a driver of future economic growth** – Most Canadians agree (35%) or somewhat agree (43%) that Canada's aerospace industry is a driver of future economic growth, while eight per cent somewhat disagree and three per cent disagree with this. Eleven per cent are unsure.

- **Nearly nine in ten Canadians agree or somewhat agree that jobs in Canada's aerospace industry are the type we need in the future** – A majority of Canadians agree (48%) or somewhat agree (38%) that jobs in Canada's aerospace industry are the types of jobs that we need in the future, while five per cent somewhat disagree and three per cent disagree with this. Six per cent are unsure.

- **More than six in ten Canadians say a federal political party including a cohesive strategy to grow Canada's aerospace presence in their policy platform would make no difference to how they vote in the next election** – Asked how it would impact their vote in the next federal election if a federal political party offered a policy platform that included a cohesive strategy to maintain and grow Canada's global aerospace presence, 61 per cent of Canadians say it would make no difference. More than one in three (35%) say they would be more likely to vote for that party, while four per cent say they would be less likely to do so.

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 November 3rd and 7th, 2018 as part of an omnibus survey. 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 Aerospace Industries Association of Canada and the research was conducted by Nanos Research.
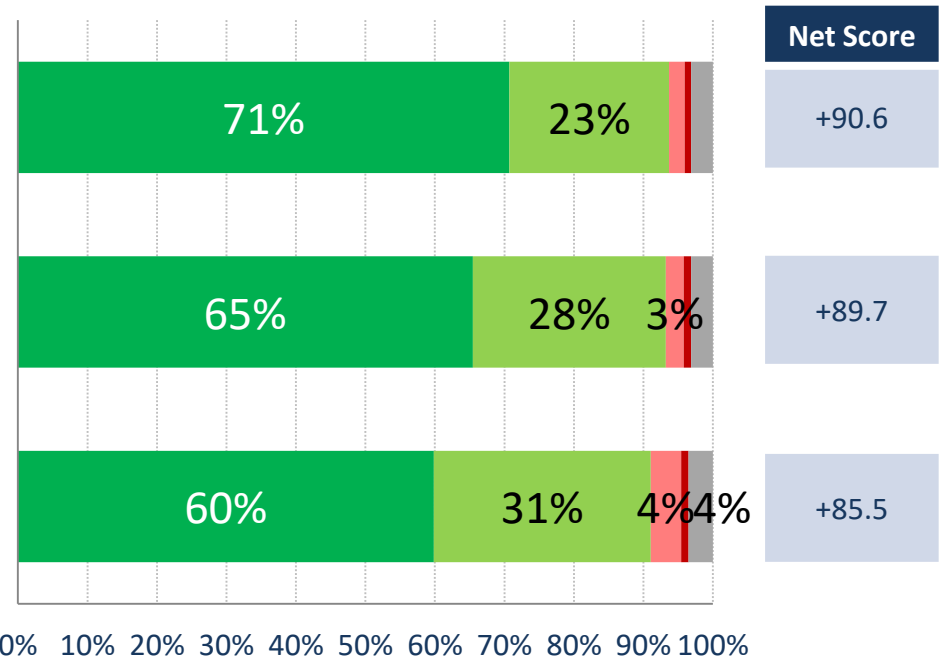
Support for aerospace industry in Canada

	Net Score
As much as possible, Canadian sub contractors and Canadian partner firms should be used for aerospace work performed in Canada, such as the maintenance of aircraft and ships.	+90.6
The Government of Canada creating an environment that encourages more Canadian jobs in the aerospace industry.	+89.7
The Government of Canada creating an environment that keeps Canada's aerospace industry competitive in the global marketplace.	+85.5

As much as possible, Canadian sub contractors and Canadian partner firms should be used for aerospace work performed in Canada, such as the maintenance of aircraft and ships. — 71% / 23%

The Government of Canada creating an environment that encourages more Canadian jobs in the aerospace industry. — 65% / 28% / 3%

The Government of Canada creating an environment that keeps Canada's aerospace industry competitive in the global marketplace. — 60% / 31% / 4% / 4%

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Support ■ Somewhat support ■ Somewhat oppose ■ Oppose ■ Unsure
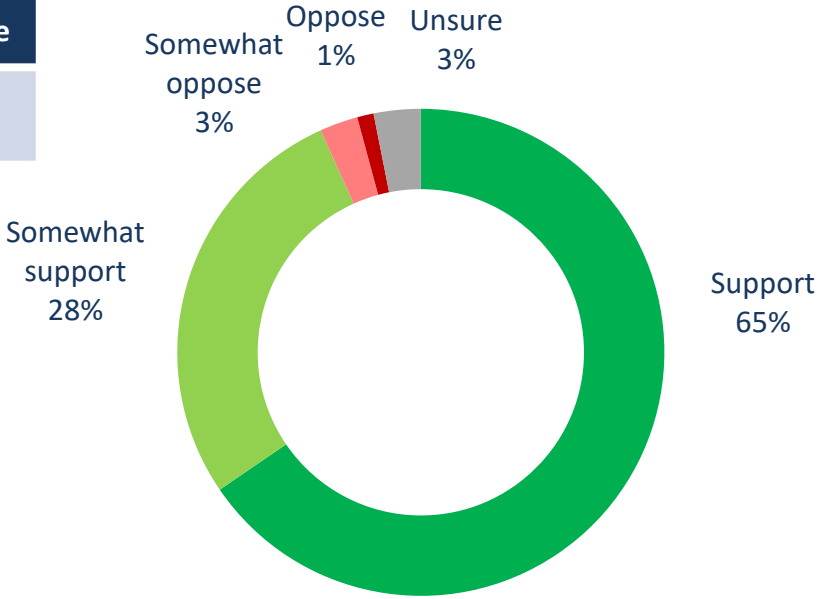
*Note: Charts may not add up to 100 due to rounding

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

Canadian government encouraging more aerospace industry jobs

Net Score
+89.7

Oppose 1%
Unsure 3%
Somewhat oppose 3%
Somewhat support 28%
Support 65%

Subgroups	Support/ Somewhat support
Atlantic (n=100)	96.4%
Quebec (n=250)	92.7%
Ontario (n=300)	95.9%
Prairies (n=200)	88.0%
British Columbia (n=150)	93.9%
Male (n=549)	94.3%
Female (n=451)	92.2%
18 to 34 (n=237)	92.6%
35 to 54 (n=344)	92.0%
55 plus (n=419)	94.8%

*Weighted to the true population proportion.

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

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following? [RANDOMIZE]
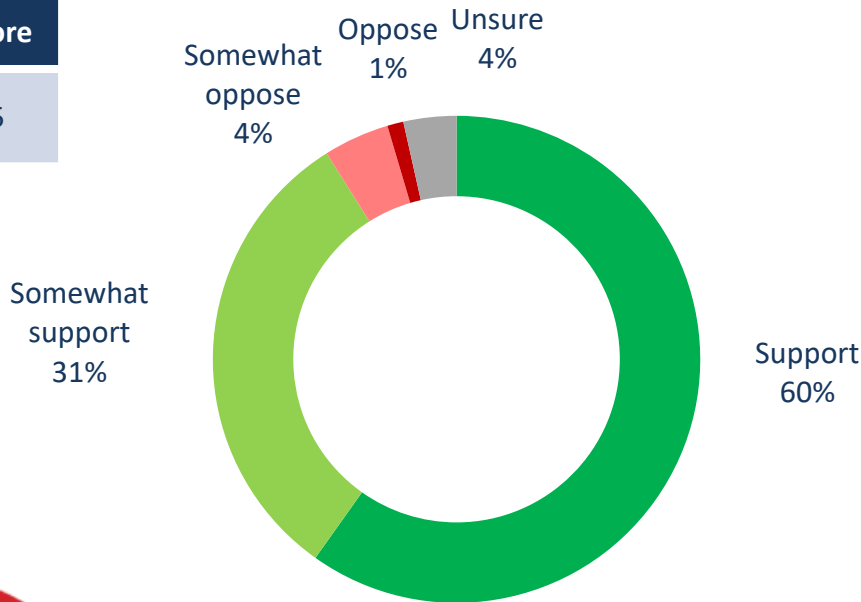
The Government of Canada creating an environment that encourages more Canadian jobs in the aerospace industry.

Canadian government keeping Canada's aerospace industry competitive

Net Score
+85.5

Oppose 1%
Unsure 4%
Somewhat oppose 4%
Somewhat support 31%
Support 60%

Subgroups	Support/ Somewhat support
Atlantic (n=100)	93.0%
Quebec (n=250)	92.6%
Ontario (n=300)	92.1%
Prairies (n=200)	87.3%
British Columbia (n=150)	90.1%
Male (n=549)	92.0%
Female (n=451)	90.0%
18 to 34 (n=237)	89.8%
35 to 54 (n=344)	89.5%
55 plus (n=419)	93.3%

*Weighted to the true population proportion.

*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 Government of Canada creating an environment that keeps Canada's aerospace industry competitive in the global marketplace.

Involvement of Canadian companies in aerospace work performed in Canada

Net Score
+90.6

Somewhat oppose 2%
Oppose 1%
Unsure 3%

Somewhat support 23%

Support 71%

Subgroups	Support/ Somewhat support
Atlantic (n=100)	95.2%
Quebec (n=250)	95.2%
Ontario (n=300)	93.1%
Prairies (n=200)	92.0%
British Columbia (n=150)	93.6%
Male (n=549)	94.0%
Female (n=451)	93.5%
18 to 34 (n=237)	90.6%
35 to 54 (n=344)	93.3%
55 plus (n=419)	96.4%

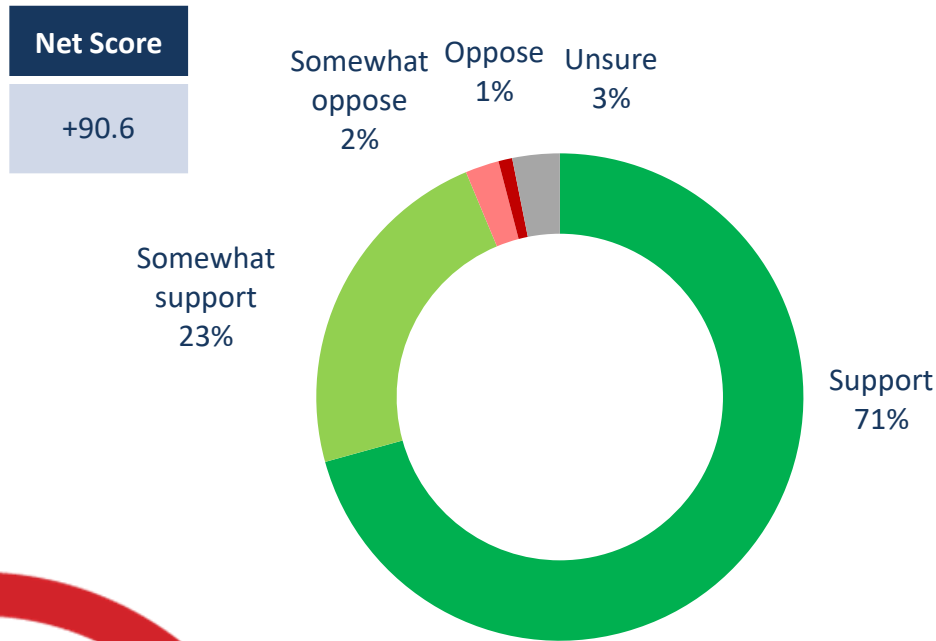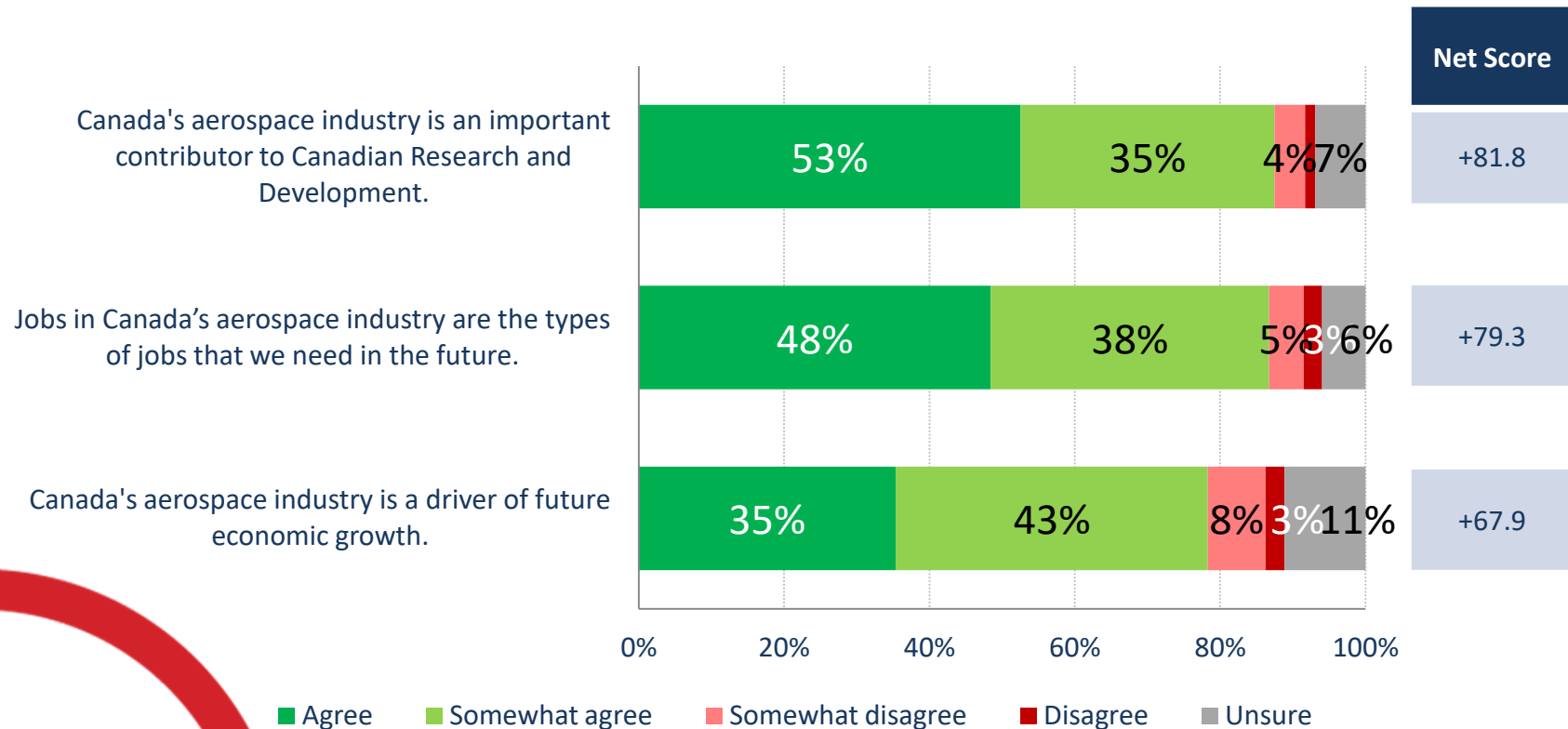*Weighted to the true population proportion.

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

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

As much as possible, Canadian sub contractors and Canadian partner firms should be used for aerospace work performed in Canada, such as the maintenance of aircraft and ships.

Role of the Canadian aerospace industry in the future

	Net Score
Canada's aerospace industry is an important contributor to Canadian Research and Development. — 53% Agree, 35% Somewhat agree, 4% Somewhat disagree, 1% Disagree, 7% Unsure	+81.8
Jobs in Canada's aerospace industry are the types of jobs that we need in the future. — 48% Agree, 38% Somewhat agree, 5% Somewhat disagree, 3% Disagree, 6% Unsure	+79.3
Canada's aerospace industry is a driver of future economic growth. — 35% Agree, 43% Somewhat agree, 8% Somewhat disagree, 3% Disagree, 11% Unsure	+67.9

Legend: ■ Agree ■ Somewhat agree ■ Somewhat disagree ■ Disagree ■ Unsure

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

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Importance of Canadian aerospace industry to research and development

Net Score

+81.8

Agree
53%

Somewhat
agree
35%

Somewhat
disagree
4%

Disagree
1%

Unsure
7%

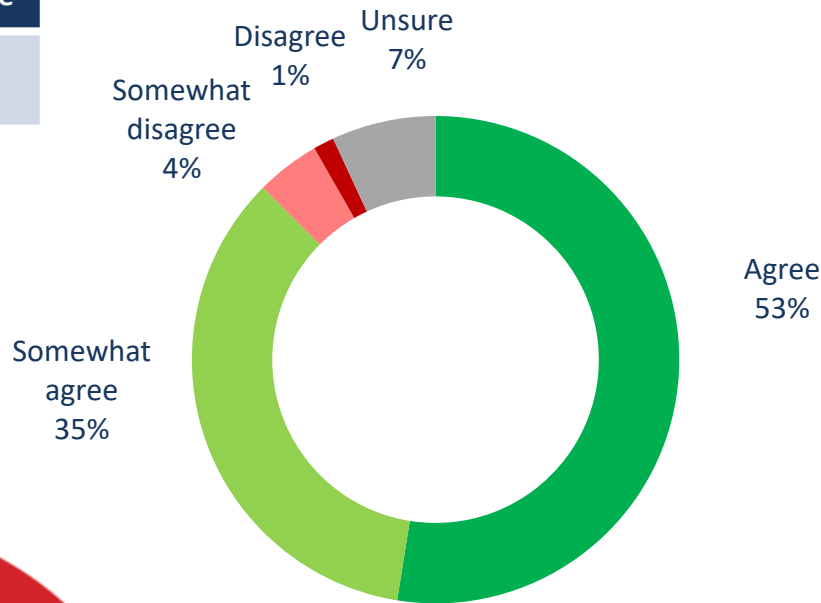| Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	89.0%
Quebec (n=250)	87.9%
Ontario (n=300)	92.9%
Prairies (n=200)	80.6%
British Columbia (n=150)	84.0%
Male (n=549)	89.0%
Female (n=451)	86.0%
18 to 34 (n=237)	87.0%
35 to 54 (n=344)	84.9%
55 plus (n=419)	90.0%

*Weighted to the true population proportion.

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

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Canada's aerospace industry is an important contributor to Canadian Research and Development.

Canadian aerospace industry drives economic growth

Net Score

+67.9

Unsure
11%

Disagree
3%

Somewhat
disagree
8%

Agree
35%

Somewhat
agree
43%

Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	79.4%
Quebec (n=250)	81.2%
Ontario (n=300)	81.8%
Prairies (n=200)	71.2%
British Columbia (n=150)	75.2%
Male (n=549)	81.0%
Female (n=451)	75.6%
18 to 34 (n=237)	72.3%
35 to 54 (n=344)	78.6%
55 plus (n=419)	82.3%

*Weighted to the true population proportion.

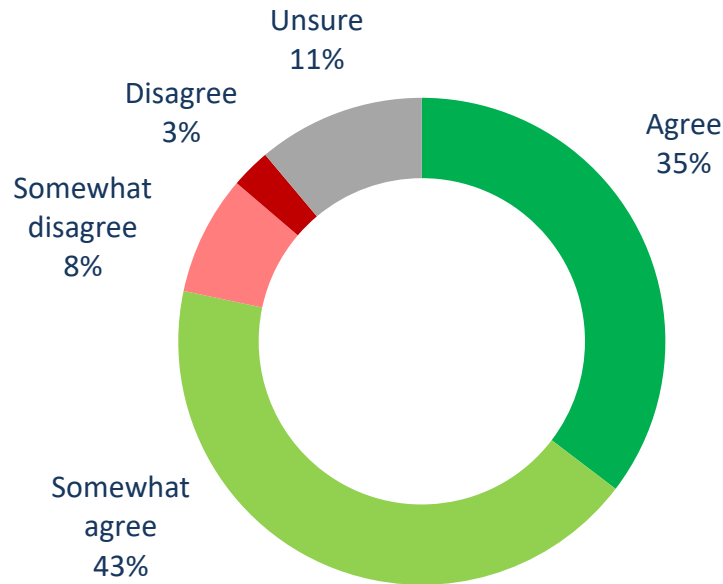***Note: Charts may not add up to 100 due to rounding**
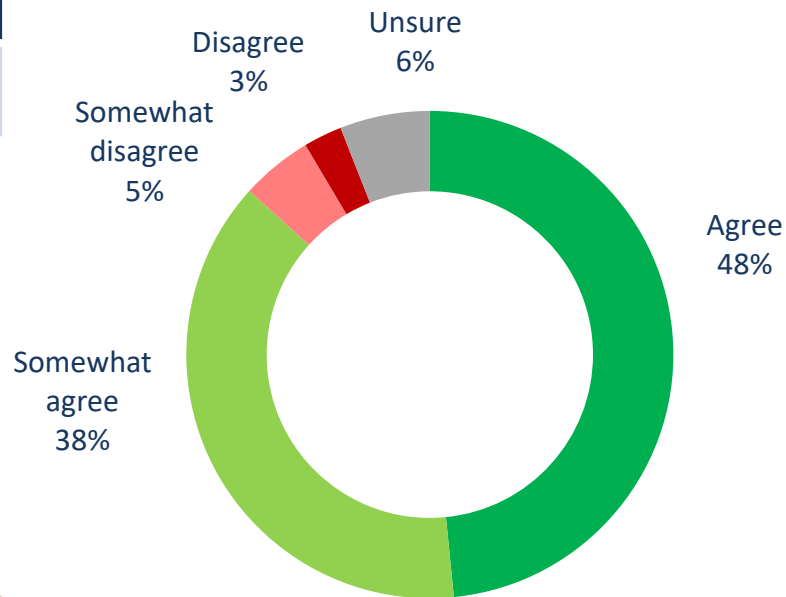
QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Canada's aerospace industry is a driver of future economic growth.

Necessity of Canadian aerospace jobs in the future

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, November 3rd to 7th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score

+79.3

Unsure 6%

Disagree 3%

Somewhat disagree 5%

Somewhat agree 38%

Agree 48%

Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	92.3%
Quebec (n=250)	86.9%
Ontario (n=300)	91.1%
Prairies (n=200)	80.5%
British Columbia (n=150)	82.3%
Male (n=549)	90.8%
Female (n=451)	82.9%
18 to 34 (n=237)	80.3%
35 to 54 (n=344)	85.9%
55 plus (n=419)	91.8%

*Weighted to the true population proportion.

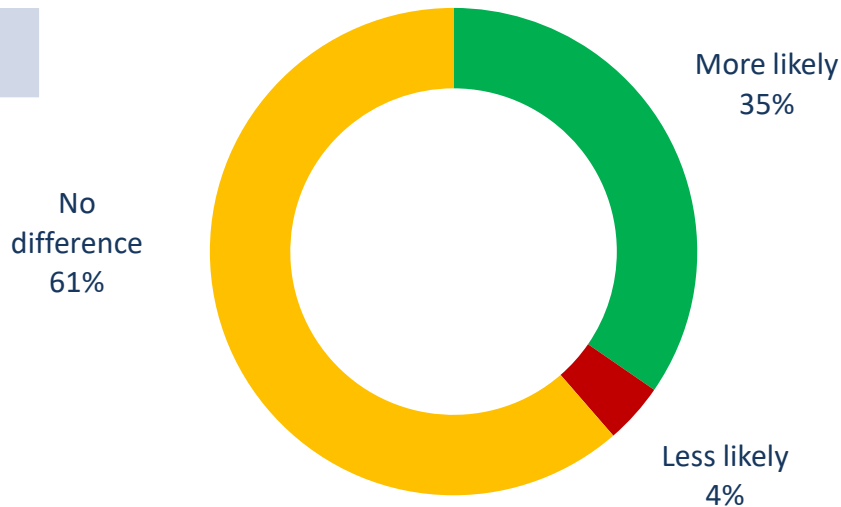***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree with the following statements? [RANDOMIZE]

Jobs in Canada's aerospace industry are the types of jobs that we need in the future.

Importance of Canadian aerospace policy in the next federal election

Net Score

+30.6

More likely
35%

No
difference
61%

Less likely
4%

Subgroups	No difference
Atlantic (n=100)	62.9%
Quebec (n=250)	55.7%
Ontario (n=300)	59.2%
Prairies (n=200)	68.3%
British Columbia (n=150)	65.1%
Male (n=549)	54.8%
Female (n=451)	67.7%
18 to 34 (n=237)	67.3%
35 to 54 (n=344)	64.8%
55 plus (n=419)	54.2%

*Weighted to the true population proportion.

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

QUESTION – If a federal political party offered a policy platform that included a cohesive strategy to maintain and grow Canada's global aerospace presence, would you be more likely to vote for the party, less likely to vote for the party or would it make no difference to your vote in the next federal election?
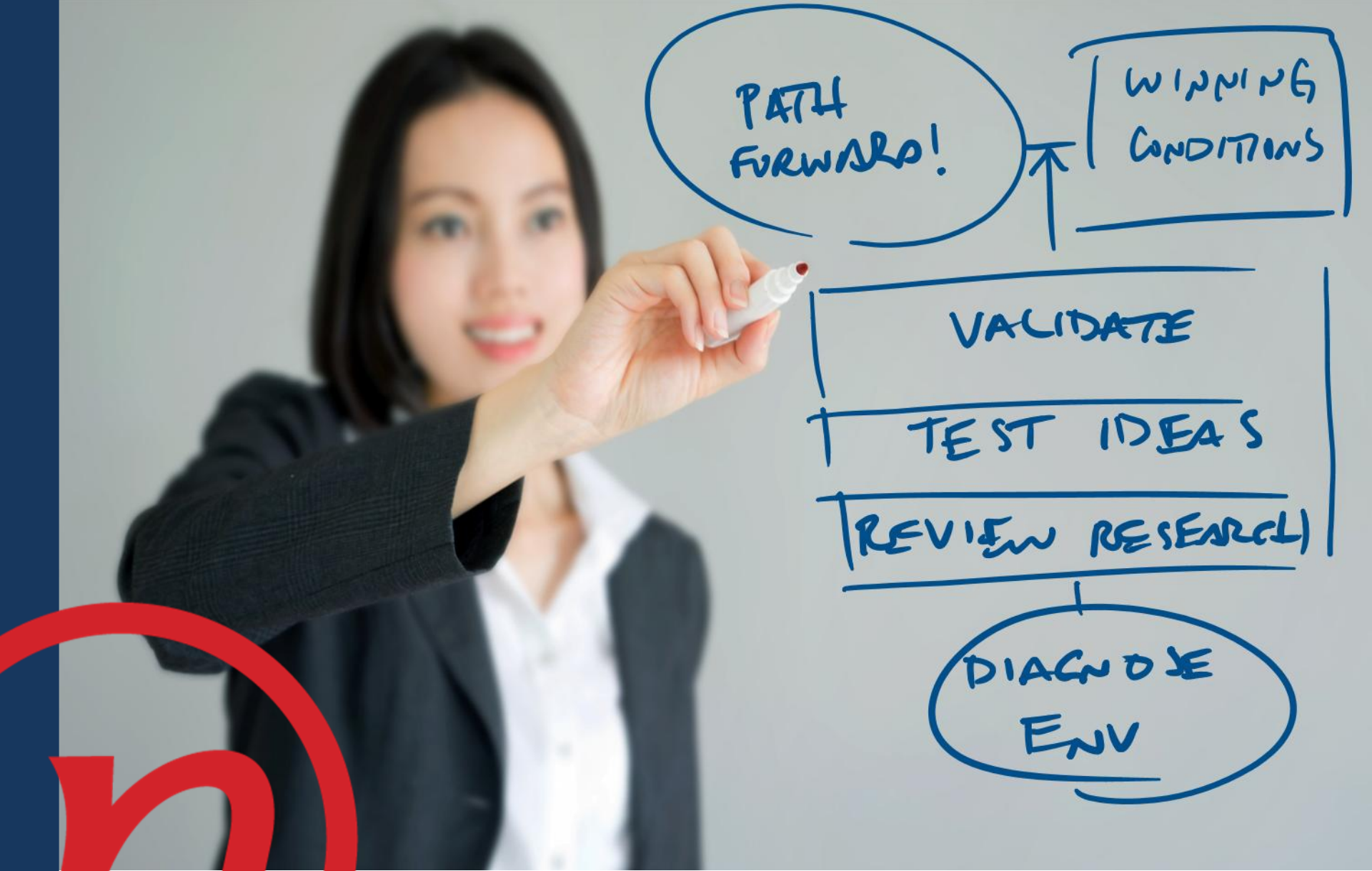
Methodology

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 November 3rd and 7th, 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 Aerospace Industries Association of Canada and was conducted by Nanos Research.

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

Technical Note

Element	Description
Organization who commissioned the research	Aerospace Industries Association of Canada
Final Sample Size	1,000 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.
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	November 3rd to 7th, 2018.
Language of Survey	The survey was conducted in both English and French.
Standards	This report meets the standards set forth by ESOMAR and AAPOR.

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 three of an omnibus survey. Previous modules included content related to mortgages, the carbon tax, feelings towards the federal government, and Saudi Arabia.
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.

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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

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

				Region					GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The Government of Canada creating an environment that encourages more Canadian jobs in the aerospace industry	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	65.5	67.3	67.0	66.8	61.7	64.1	67.9	63.1	56.7	65.8	71.3
	Somewhat support	%	27.8	29.1	25.7	29.1	26.3	29.8	26.4	29.1	35.9	26.2	23.5
	Somewhat oppose	%	2.5	2.0	2.0	1.2	5.3	2.7	2.4	2.7	2.6	2.7	2.4
	Oppose	%	1.1	0.0	0.8	1.2	2.0	1.1	1.4	0.8	0.8	1.6	0.8
	Unsure	%	3.1	1.7	4.5	1.8	4.7	2.3	1.9	4.3	4.0	3.8	2.0

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

				Region					GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - The Government of Canada creating an environment that keeps Canada's aerospace industry competitive in the global marketplace	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	59.8	62.8	62.0	61.8	57.3	53.7	62.3	57.4	50.8	59.3	66.6
	Somewhat support	%	31.2	30.2	30.6	30.3	30.0	36.4	29.7	32.6	39.0	30.2	26.7
	Somewhat oppose	%	4.4	4.5	2.6	4.3	5.6	5.8	4.4	4.3	4.3	4.6	4.3
	Oppose	%	1.1	0.0	0.8	0.7	2.4	1.2	1.3	0.9	1.5	1.0	0.8
	Unsure	%	3.5	2.5	4.0	2.9	4.8	2.8	2.3	4.7	4.4	5.0	1.6

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

				Region					GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question -As much as possible, Canadian sub contractors and Canadian partner firms should be used for aerospace work performed in Canada, such as the maintenance of aircraft and ships	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	70.7	79.3	72.6	68.6	64.3	74.6	69.2	72.2	59.5	72.2	77.3
	Somewhat support	%	23.0	15.9	22.6	24.5	27.7	19.0	24.8	21.3	31.1	21.1	19.1
	Somewhat oppose	%	2.2	1.1	1.1	2.7	3.8	1.9	2.1	2.4	3.9	1.9	1.4
	Oppose	%	0.9	0.0	1.2	0.9	0.4	1.7	1.2	0.6	1.0	1.4	0.4
	Unsure	%	3.1	3.6	2.6	3.3	3.7	2.8	2.7	3.6	4.5	3.4	1.9

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Do you agree, somewhat agree, somewhat disagree or disagree with the following statements: [Randomize]

					Region				GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada's aerospace industry is an important contributor to Canadian Research and Development	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	52.5	53.0	54.5	58.2	42.9	50.2	54.9	50.2	48.1	49.8	58.0
	Somewhat agree	%	34.9	36.0	33.4	34.7	37.7	33.8	34.1	35.8	38.9	35.1	32.0
	Somewhat disagree	%	4.2	6.3	2.5	3.0	7.2	4.3	4.4	4.1	4.0	5.6	3.2
	Disagree	%	1.4	1.1	1.5	1.1	1.9	1.2	1.4	1.4	1.9	1.8	0.6
	Unsure	%	6.9	3.5	8.1	3.1	10.2	10.4	5.1	8.6	7.1	7.6	6.2

Do you agree, somewhat agree, somewhat disagree or disagree with the following statements: [Randomize]

					Region				GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canada's aerospace industry is a driver of future economic growth	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	35.4	34.6	40.8	37.1	28.1	33.0	39.2	31.6	32.0	33.3	39.5
	Somewhat agree	%	43.0	44.8	40.4	44.7	43.1	42.2	41.8	44.0	40.3	45.3	42.8
	Somewhat disagree	%	7.9	9.5	3.4	7.8	13.4	7.4	8.5	7.4	9.4	7.6	7.2
	Disagree	%	2.6	3.4	2.4	1.4	4.9	1.9	1.9	3.3	2.0	3.3	2.5
	Unsure	%	11.1	7.7	12.9	8.9	10.5	15.5	8.5	13.6	16.3	10.5	8.0

2018-1313 – Aerospace Industries Association of Canada – November STAT SHEET

Do you agree, somewhat agree, somewhat disagree or disagree with the following statements: [Randomize]

					Region				GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Jobs in Canada's aerospace industry are the types of jobs that we need in the future	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	48.4	47.6	51.8	51.1	43.0	45.2	54.5	42.6	36.8	48.2	56.7
	Somewhat agree	%	38.3	44.7	35.1	40.0	37.5	37.1	36.3	40.3	43.5	37.7	35.1
	Somewhat disagree	%	4.8	3.5	3.6	3.1	8.7	5.7	3.7	5.7	6.8	5.0	3.1
	Disagree	%	2.6	2.4	2.0	1.4	5.1	2.5	1.4	3.7	4.3	2.9	1.0
	Unsure	%	6.0	1.8	7.6	4.5	5.8	9.4	4.1	7.8	8.6	6.1	4.0

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 November 3rd and 7th, 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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					Region				GENDER		Age		
			Canada 2018-11	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - If a federal political party offered a policy platform that included a cohesive strategy to maintain and grow Canada's global aerospace presence, would you be more likely to vote for the party, less likely to vote for the party or would it make no difference to your vote in the next federal election?	Total	Unwgt N	1000	100	250	300	200	150	549	451	237	344	419
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	More likely	%	34.6	30.5	39.3	38.9	25.9	32.5	42.0	27.4	29.7	30.2	41.9
	Less likely	%	4.0	6.7	5.0	1.9	5.9	2.4	3.2	4.8	3.0	5.0	3.9
	No difference	%	61.4	62.9	55.7	59.2	68.3	65.1	54.8	67.7	67.3	64.8	54.2

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 November 3rd and 7th, 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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