Strong support for free trade as Canadians resist concessions.

National Survey | Summary
Conducted by Nanos for the Chicago Council on Global Affairs
Field: May 31 to June 2, 2026
Submission 2026-3039

THE CHICAGO COUNCIL ON GLOBAL AFFAIRS

NANOS

METHODOLOGY

The research gauged the views of Canadians on the importance of relationships with other parties to the Canadian economy, the impact of USMCA on the Canadian economy, and their preferred path forward for Canadian leaders as it relates to USMCA and Canada-U.S. relations.

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1044 Canadians, 18 years of age or older, from May 31 to June 2, 2026, as part of an omnibus survey. The sample included both land- and cell-lines across Canada. 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 randomly called using random digit dialing with a maximum of five call backs.

The margin of error for this survey is ±3.0 percentage points, 19 times out of 20.

This study was commissioned by the Chicago Council on Global Affairs, and the research was conducted by Nanos Research.

Full data tables with weighted and unweighted number of interviews is here.

Tables within the report that have significant differences are highlighted in yellow.

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

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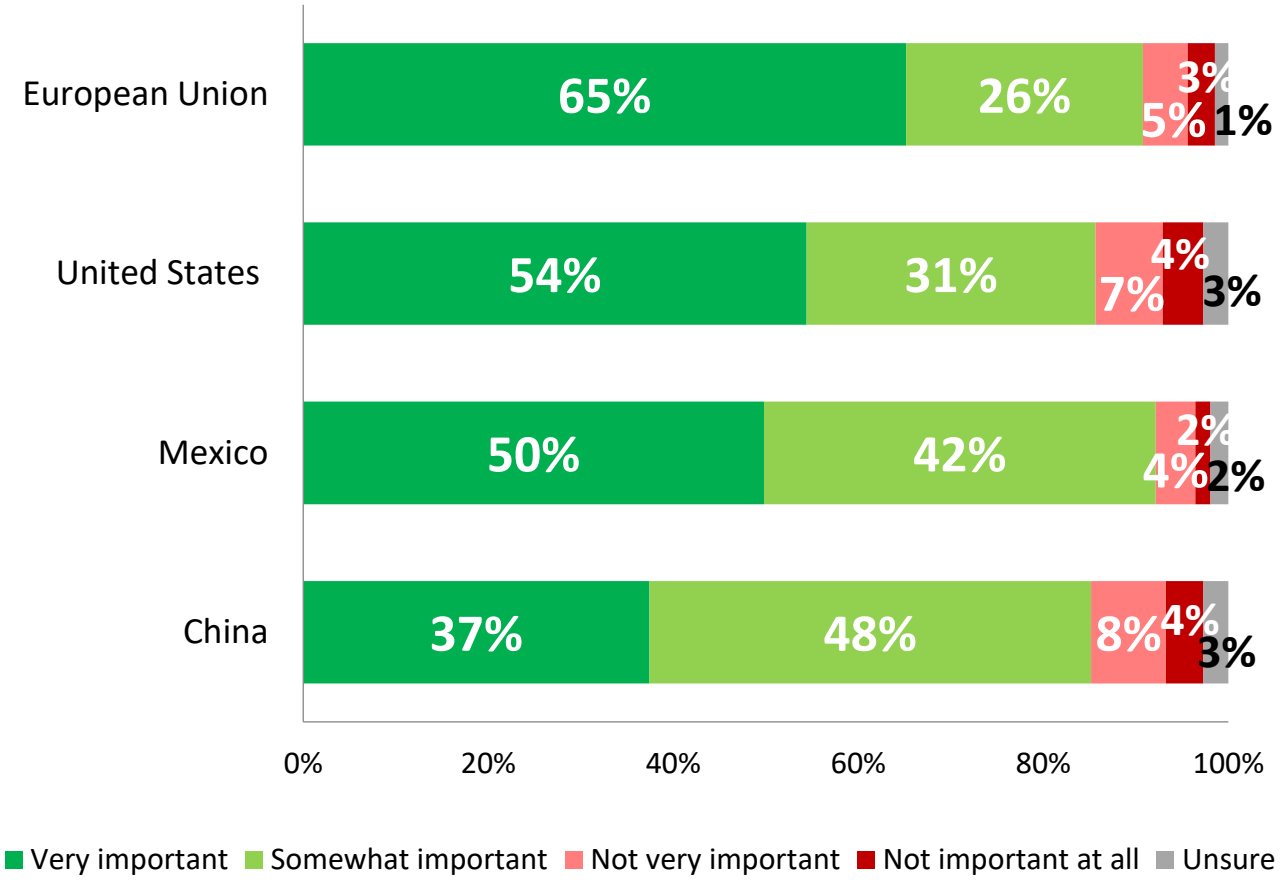
Q - How important are relationships with the countries listed below to the Canadian economy? [RANDOMIZE]



*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Views on the importance of relationships with various countries to the Canadian economy

Most Canadians

view relationships with each tested country as important to one extent or another to the Canadian economy. Canadians are more likely to view a relationship with the European Union as very important than they are to report this view for any of the other countries tested.

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Views on the importance of a relationship with the European Union to the Canadian economy

Q – How important are relationships with the countries listed below to the Canadian economy? [RANDOMIZE] **European Union**

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Very important	65.1%	67.0%	64.1%	65.2%	60.9%	71.0%	62.4%	68.0%	63.5%	63.4%	67.6%
Somewhat important	25.6%	22.1%	27.3%	26.5%	28.3%	18.6%	26.7%	24.4%	25.1%	25.7%	25.9%
Not very important	4.8%	5.7%	3.7%	3.7%	7.6%	5.9%	7.1%	2.8%	5.9%	5.6%	3.6%
Not important at all	2.9%	0.8%	2.8%	3.1%	3.3%	3.2%	3.2%	2.8%	2.1%	4.1%	2.5%
Unsure	1.5%	4.4%	2.0%	1.4%	-	1.3%	0.7%	2.0%	3.4%	1.2%	0.4%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Views on the importance of a relationship with the United States to the Canadian economy

Q – How important are relationships with the countries listed below to the Canadian economy? [RANDOMIZE] **United States**

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Very important	54.4%	45.7%	51.6%	56.4%	56.5%	54.8%	61.4%	48.1%	56.5%	56.3%	51.5%
Somewhat important	31.2%	32.2%	34.8%	30.3%	29.2%	30.1%	26.2%	36.3%	30.0%	30.0%	33.0%
Not very important	7.3%	12.6%	5.1%	6.9%	8.9%	7.1%	7.4%	7.0%	5.3%	7.0%	8.7%
Not important at all	4.4%	4.3%	4.6%	3.7%	3.7%	6.7%	3.5%	4.9%	4.4%	4.0%	4.7%
Unsure	2.7%	5.1%	3.8%	2.6%	1.7%	1.3%	1.5%	3.7%	3.8%	2.7%	2.0%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Views on the importance of a relationship with Mexico to the Canadian economy

Q – How important are relationships with the countries listed below to the Canadian economy? [RANDOMIZE] **Mexico**

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Very important	49.8%	46.5%	49.8%	50.0%	49.7%	50.9%	49.7%	49.7%	40.3%	48.4%	57.1%
Somewhat important	42.3%	44.3%	41.3%	42.7%	43.1%	41.2%	42.9%	42.1%	46.3%	43.4%	39.0%
Not very important	4.3%	2.7%	5.6%	4.0%	3.3%	4.9%	4.0%	4.6%	5.9%	5.4%	2.4%
Not important at all	1.6%	0.8%	1.2%	1.2%	4.0%	0.8%	2.5%	0.8%	3.1%	1.0%	1.2%
Unsure	1.9%	5.7%	2.0%	2.0%	-	2.1%	0.9%	2.8%	4.4%	1.9%	0.4%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Views on the importance of a relationship with China to the Canadian economy

Q –How important are relationships with the countries listed below to the Canadian economy? [RANDOMIZE] **China**

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Very important	37.4%	34.9%	31.4%	41.6%	32.7%	42.8%	39.3%	35.5%	42.5%	38.7%	33.1%
Somewhat important	47.7%	48.1%	54.0%	44.2%	52.8%	40.4%	45.0%	50.7%	45.6%	42.9%	52.9%
Not very important	8.1%	8.6%	7.1%	8.1%	9.7%	7.6%	8.9%	7.4%	5.1%	11.1%	7.7%
Not important at all	4.0%	1.6%	3.6%	4.2%	3.4%	6.4%	5.1%	3.1%	3.3%	4.9%	3.9%
Unsure	2.7%	6.8%	4.0%	1.9%	1.4%	2.8%	1.7%	3.3%	3.6%	2.5%	2.3%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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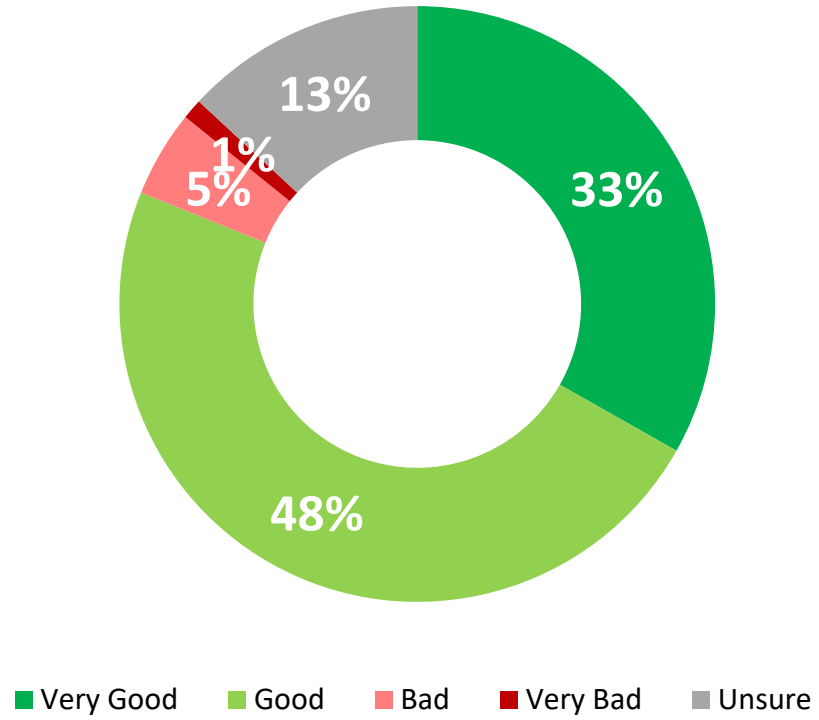
Impact of USMCA on the Canadian economy

Q – Overall, do you think the US-Mexico-Canada free trade agreement, also known as USMCA, is good or bad for the Canadian economy?



Canadians are far more likely

to believe USMCA has been either very good or good than very bad or bad for the Canadian economy. A notable 13 per cent of Canadians are unsure whether it has been good or bad.

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Impact of USMCA on the Canadian economy – By demographics

Q – Overall, do you think the US-Mexico-Canada free trade agreement, also known as USMCA, is good or bad for the Canadian economy?

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Very Good	33.2%	25.4%	41.9%	34.0%	25.7%	30.1%	36.9%	29.7%	27.1%	33.2%	37.2%
Good	47.9%	56.0%	42.4%	47.4%	55.5%	44.6%	48.9%	47.0%	45.2%	48.1%	49.4%
Bad	4.7%	5.2%	3.8%	3.9%	4.7%	8.0%	4.9%	4.3%	6.2%	6.0%	2.7%
Very Bad	1.1%	1.3%	1.3%	0.7%	-	3.4%	1.6%	0.7%	1.5%	0.8%	1.1%
Unsure	13.1%	12.1%	10.6%	14.0%	14.1%	13.9%	7.6%	18.3%	20.0%	11.8%	9.6%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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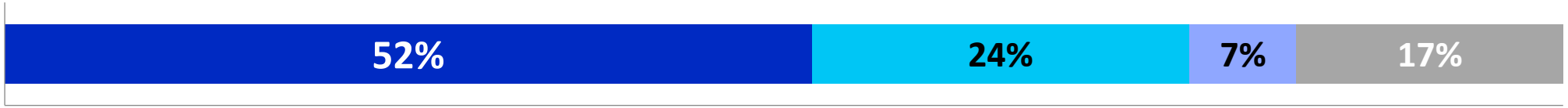
Preferred path forward for Canada with USMCA

Q – Which of these statements comes closest to your own point of view? [RANDOMIZE]



- Canada should continue to be a member of USMCA under the current terms
- Canada should do whatever is necessary to renegotiate the terms of USMCA even if the trade agreement is not as favourable as the previous agreement
- Canada should leave the USMCA
- Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

3 in 4 Canadians express desire for a trade agreement with the United States and Mexico, whether Canada should continue to be a member of USMCA under current terms or renegotiate even if the agreement is not as favourable. Of note, Canadians are two times more likely to prefer maintaining the current terms of the agreement than renegotiation.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Preferred path forward for Canada with USMCA – By demographics

Q – Which of these statements comes closest to your own point of view? [RANDOMIZE]

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Canada should continue to be a member of USMCA under the current terms	51.8%	51.8%	48.5%	53.3%	47.6%	57.9%	57.5%	46.5%	43.7%	53.5%	55.6%
Canada should do whatever is necessary to renegotiate the terms of USMCA even if the trade agreement is not as favourable as the previous agreement	24.2%	20.0%	31.5%	23.0%	20.0%	23.2%	26.0%	22.8%	18.3%	24.1%	28.3%
Canada should leave the USMCA	6.9%	10.7%	7.3%	5.5%	8.7%	6.0%	7.5%	6.2%	11.1%	6.3%	4.6%
Unsure	17.1%	17.5%	12.6%	18.3%	23.6%	12.9%	9.0%	24.5%	26.9%	16.1%	11.5%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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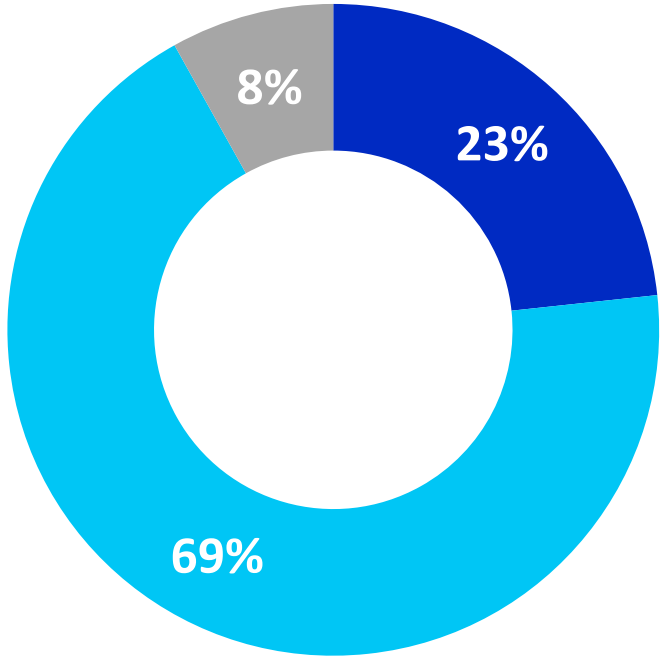
Preference regarding Canadian leaders' approach to Canada-U.S. relations

Q – Would you rather Canadian leaders: [ROTATE]



- Seek to improve relations with the United States, even if this means making concessions on trade and economic issues
- Resist making concessions on trade and economic issues, even if this means worsening relations with the United States
- Unsure

*Weighted to the true population proportion.
*Charts may not add up to 100 due to rounding.

Canadians are three times more likely

to prefer Canadian leaders resisting making concessions on trade and economic issues, even if this means worsening relationships with the U.S. than they are to favour seeking to improve relations with the U.S., even if this leads to concessions on trade and economic issues.

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

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Preference regarding Canadian leaders' approach to Canada-U.S. relations – By demographics

Q – Would you rather Canadian leaders: [ROTATE]

	Canada 2026-06 (n=1044)	Atlantic (n=100)	Quebec (n=207)	Ontario (n=353)	Prairies (n=218)	British Columbia (n=166)	Men (n=544)	Women (n=494)	18 to 34 (n=173)	35 to 54 (n=372)	55 plus (n=499)
Resist making concessions on trade and economic issues, even if this means worsening relations with the United States	68.6%	75.6%	72.3%	67.9%	62.7%	68.4%	66.0%	70.7%	62.7%	65.0%	75.3%
Seek to improve relations with the United States, even if this means making concessions on trade and economic issues	23.3%	17.9%	21.4%	24.1%	27.9%	21.6%	28.4%	18.8%	24.5%	28.2%	18.8%
Unsure	8.1%	6.4%	6.4%	8.1%	9.4%	10.0%	5.6%	10.5%	12.8%	6.8%	6.0%

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, May 31 to June 2, 2026, n=1044, accurate 3.0 percentage points plus or minus, 19 times out of 20.

TECHNICAL NOTE

Element	Description
Research sponsor	Chicago Council on Global Affairs
Population and Final Sample Size	1044 Randomly selected individuals.
Source of Sample	Nanos Insights Lab
Type of Sample	Probability
Margin of Error	±3.0 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	Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online
Number of Calls	Maximum of five call backs to those recruited.
Time of Calls	Individuals recruited were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	May 31 to June 2, 2026
Language of Survey	The survey was conducted in both English and French.
Standards	Nanos Research is a member of the Canadian Research Insights Council (CRIC) and confirms that this research fully complies with all CRIC Standards including the CRIC Public Opinion Research Standards and Disclosure Requirements. https://canadianresearchinsightscouncil.ca/standards/

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2021) 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, and individuals without internet access could not participate.
Stratification	By age and gender using the latest Census information (2021) 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	12 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	Topics on the omnibus ahead of the survey content included: views on political issues, views on economic issues, contractors, online gambling, greenhouse gas reduction targets, and MAID, pipelines, oil and gas exports and cost of living.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Research/Data Collection Supplier	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanos.co Telephone:(613) 234-4666 ext. 237 Email: info@nanosresearch.com.
Tabulations	By region, age and gender: 2026-3039 Chicago Council - formatted

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Any questions?

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