

The majority of Canadians think that a trade war between Canada and the United States is likely or somewhat likely; more than half say negotiations should continue over the high tariffs and hope the U.S changes its mind

National survey released March, 2018
Project 2018-1186c



CTV
NEWS

NANOS SURVEY

Summary

The majority of Canadians think that a trade war between Canada and the United States over NAFTA and other bilateral trade issues is likely or somewhat likely in the next two years and over half say that Canada's response to the high tariffs threats should be to continue the negotiations and hope the U.S. changes its mind.

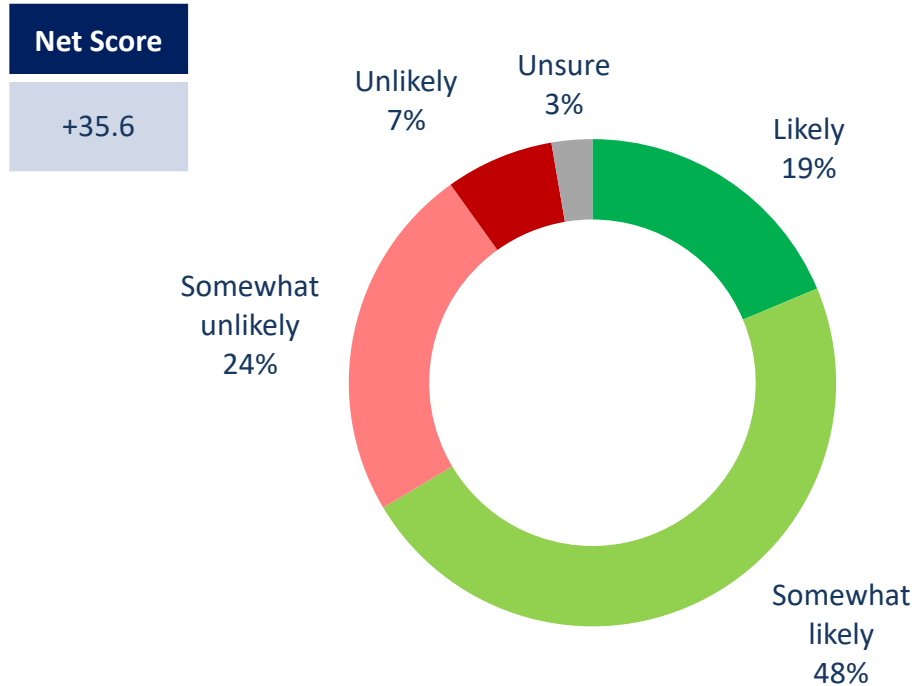
- **Two thirds of Canadians think a trade war between Canada and the United States over NAFTA and other bilateral trade issues is likely or somewhat likely in the next two years** – When asked about the likelihood of a trade war between Canada and the United States over NAFTA and other bilateral trade issues, two in three of Canadians say that it is likely (19%) or somewhat likely (48%). Three out of ten Canadians think it is somewhat unlikely (24%) or unlikely (7%). Three per cent are unsure.
- **Just over half Canadians say Canada should continue the negotiations and hope the U.S. changes its mind regarding the high tariffs on steel and aluminum**– When asked about Canada's response to high tariffs on foreign steel and aluminum recently imposed by the US President Donald Trump, the majority of Canadians think Canada should continue negotiations and hope the U.S. changes its mind (54%). More than a quarter (26%) say Canada should raise tariffs on U.S. products in retaliation for the U. S. tariffs. Nine per cent think Canada should break off talks on NAFTA in protest of the tariffs and four per cent think that Canada should give the US enough concessions on NAFTA to end the tariffs. Six per cent are unsure.

These observations are based on a Nanos RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, conducted between March 7th and 12th, 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.

This study was commissioned by CTV News and the research was conducted by Nanos Research.

Likelihood of a Canada-U.S trade war

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 7th to 12th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



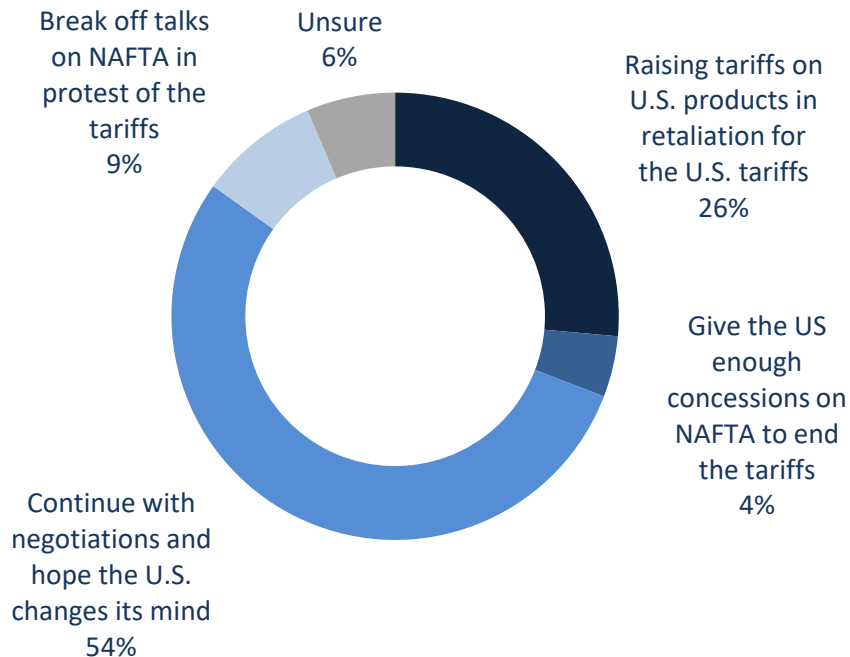
Subgroups	Likely/ Somewhat likely
Atlantic (n=100)	68.0%
Quebec (n=250)	64.1%
Ontario (n=300)	67.0%
Prairies (n=200)	64.7%
British Columbia (n=150)	70.6%
Male (n=510)	64.7%
Female (n=490)	68.2%
18 to 34 (n=214)	67.4%
35 to 54 (n=376)	68.6%
55 plus (n=410)	63.9%

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

QUESTION – Do you think a trade war between Canada and the United States over NAFTA and other bilateral trade issues is likely, somewhat likely, somewhat unlikely or unlikely in the next two years?

Response to U.S tariff threats

Source: CTV News/Nanos Research, RDD dual frame hybrid telephone and online random survey, March 7th to 12th, 2018, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Continue with negotiations and hope the U.S. changes its mind
Atlantic (n=100)	59.3%
Quebec (n=250)	50.2%
Ontario (n=300)	55.4%
Prairies (n=200)	52.0%
British Columbia (n=150)	56.6%
Male (n=510)	57.7%
Female (n=490)	50.4%
18 to 34 (n=214)	51.4%
35 to 54 (n=376)	54.1%
55 plus (n=410)	55.7%

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

QUESTION – As you may know, Canada is the largest foreign supplier of steel and aluminum to the US. Recently, US President Donald Trump has threatened to put high tariffs on foreign steel and aluminum entering the US until Canada and Mexico agree to a renegotiated North American Free Trade Agreement. What do you think Canada’s response should be? [RANDOMIZE]

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 March 7th and 12th, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. 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 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.

This study was commissioned by CTV News and the research was conducted by Nanos Research.

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

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	CTV	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	1,000 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 line 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 (2014) 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	Thirteen 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.
Demographics (Other)	Age, gender, education, income	Question Content	This was module two of an omnibus survey. The preceding module related to top issues of national concern
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Number of Calls/	Maximum of five call backs.	Survey Company	Nanos Research
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Field Dates	March 7 th to 12 th , 2018.		
Language of Survey	The survey was conducted in both English and French.		

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



2018-1186c – CTV/Nanos Survey – NAFTA - STAT SHEET

			Region					Gender		Age			
			Canada 2018-02	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Do you think a trade war between Canada and the United States over NAFTA and other bilateral trade issues is likely, somewhat likely, somewhat unlikely or unlikely in the next two years?	Total	Unwgt N	1000	100	250	300	200	150	510	490	214	376	410
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Likely	%	18.7	23.0	18.9	17.0	16.9	21.1	17.4	19.9	22.2	21.6	13.6
	Somewhat likely	%	47.8	45.0	45.2	50.0	47.8	49.5	47.3	48.3	45.2	47.0	50.3
	Somewhat unlikely	%	23.7	21.8	26.4	23.9	24.9	18.4	25.6	21.9	21.6	21.2	27.2
	Unlikely	%	7.2	6.4	4.5	7.2	9.3	9.2	8.4	6.0	7.8	6.8	7.0
	Unsure	%	2.7	3.8	5.0	1.9	1.2	1.8	1.3	4.1	3.1	3.3	1.8

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2018-1186c – CTV/Nanos Survey – NAFTA - STAT SHEET

			Region						Gender		Age			
			Total	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus	
Question - As you may know, Canada is the largest foreign supplier of steel and aluminum to the US. Recently, US President Donald Trump has threatened to put high tariffs on foreign steel and aluminum entering the US until Canada and Mexico agree to a renegotiated North American Free Trade Agreement. What do you think Canada's response should be? [RANDOMIZE]	Total	Unwgt N	1000	100	250	300	200	150	510	490	214	376	410	
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389	
		Raising tariffs on U.S. products in retaliation for the U.S. tariffs	%	26.4	28.3	26.9	26.4	26.1	25.0	22.3	30.4	23.9	26.5	28.1
		Give the US enough concessions on NAFTA to end the tariffs	%	4.4	4.7	2.4	5.2	6.8	2.9	6.1	2.8	3.1	3.5	6.1
		Continue with negotiations and hope the U.S. changes its mind	%	54.0	59.3	50.2	55.4	52.0	56.6	57.7	50.4	51.4	54.1	55.7
		Break off talks on NAFTA in protest of the tariffs	%	8.7	4.9	13.6	5.7	7.4	11.1	7.9	9.5	10.7	10.0	6.3
		Unsure	%	6.4	2.9	7.0	7.2	7.8	4.5	6.0	6.8	10.9	5.8	3.8

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