

# Canadians opinions on the impact of international trade agreements on the Canadian economy

Nanos Trade Survey Summary

submitted by Nanos to Nanos, February 2017  
(Submission 2017-979)





# Impressions on positive impact of trade agreements up

A majority of Canadians believe that the Canadian economy is better off because of the free trade agreement between Canada and the United States and because of NAFTA. More than half of Canadians also think that potential free trade agreements with the countries that make up the EU and the Asia Pacific countries that make up the TPP would have a positive or somewhat positive impact on the Canadian economy.

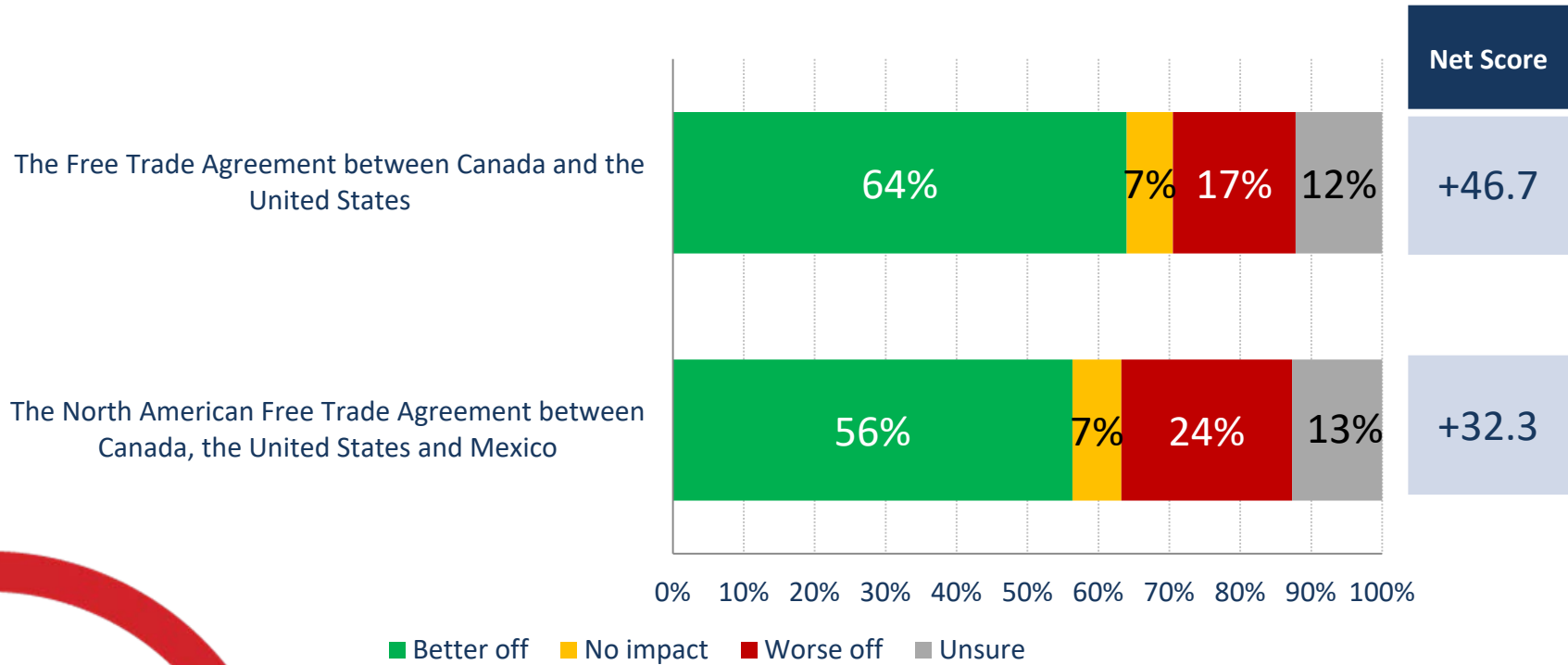
- **Majority of Canadians think the Canadian economy is better off because of the Free Trade Agreement between Canada and the United States** – Canadians are almost twice as likely to say that they think the Canadian economy is better off because of the Free Trade Agreement with the US in 2017 (64%) than they were in 2012 (33%). Seven per cent of Canadians think there has been no impact, while just under one in five said the Canadian economy is worse off (17%) in 2017. Twelve per cent are unsure.
- **Just over one half of Canadians think the Canadian economy is better off because of the North American Free Trade Agreement between Canada, the United States and Mexico** – A majority of Canadians believe the Canadian economy is better off (56%) because of NAFTA. Just over three in ten believe that NAFTA has either had no impact (seven per cent) or that the economy is worse off (24%). Thirteen per cent are unsure. Canadians were relatively more likely to say that the economy was better off if they lived in the prairies (66%) and Quebec (64%), as opposed to Ontario (48%) or British Columbia (51%).
- **Majority of Canadians think that a free trade agreement with the countries that make up the EU would have a positive or somewhat positive effect on the Canadian economy** – More than seven in ten Canadians think that a free trade agreement with the countries that make up the EU would have a positive (42%) or somewhat positive (35%) impact on the Canadian economy. Just under two in ten Canadians believe that it would have a neutral (11%), somewhat negative (four per cent), or negative (three per cent) impact on the Canadian economy. Six per cent of Canadians are unsure.
- **More than half of Canadians believe that a free trade agreement with the Asia Pacific countries that make up the Trans-Pacific Partnership would have a positive or somewhat positive effect on the Canadian economy** – Just under three in five Canadians believe that a new free trade agreement with the Asia Pacific countries that make up the TPP would have a positive (30%) or somewhat positive (28%) impact on the Canadian economy. Three in ten Canadians believe that it would have a neutral (12%), somewhat negative (12%) or negative (ten per cent) impact on the Canadian economy. Eight per cent are unsure.

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 January 28<sup>th</sup> and February 1<sup>st</sup>, 2017. 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  $\pm 3.1$  percentage points, 19 times out of 20.

This study was sponsored by Nanos Research.

# Impact of free trade agreements

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup> 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



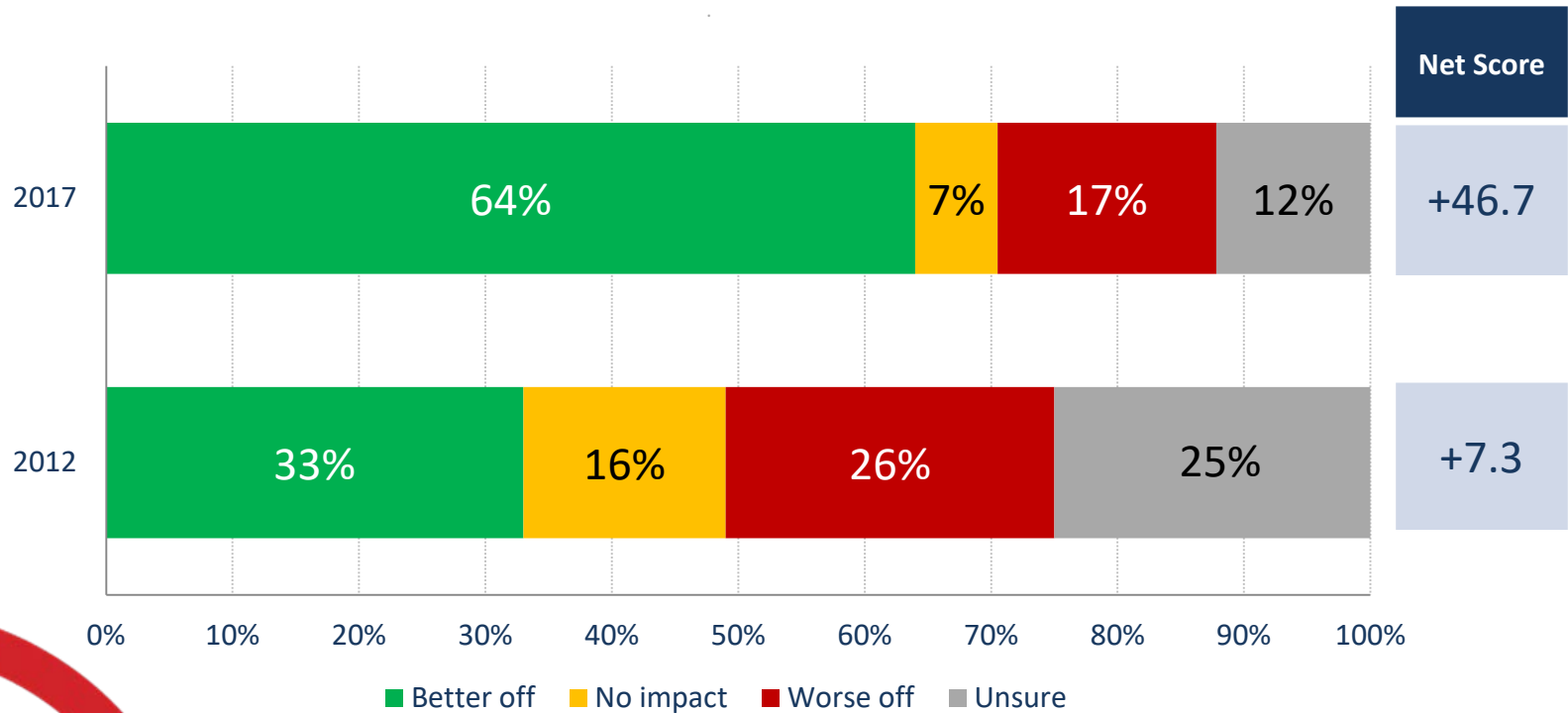
**\*Note: Charts may not add up to 100 due to rounding**

**QUESTION** - Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING]

# Free Trade Agreement between Canada and the US

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, online random survey, September 10<sup>th</sup> and 11<sup>th</sup>, 2012, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

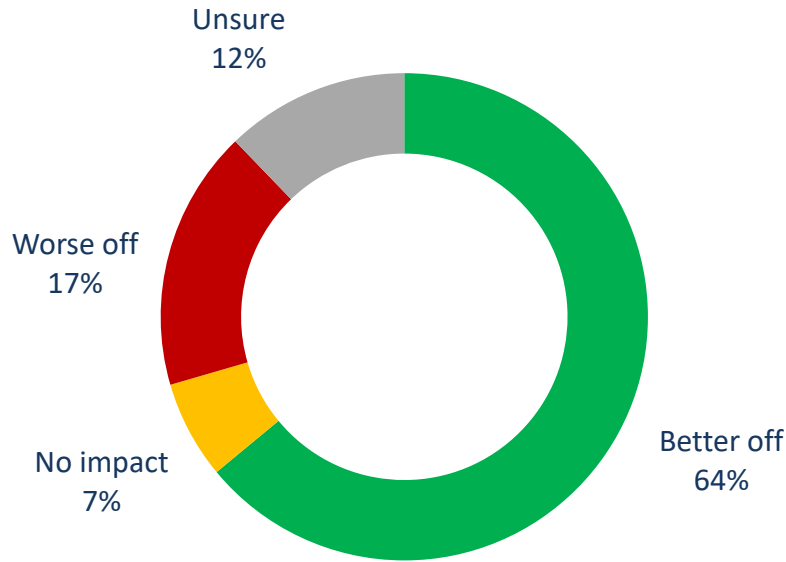
**QUESTION** - Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING]

**The Free Trade Agreement between Canada and the United States**

# Free Trade Agreement between Canada and the US

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

**Net Score**  
+46.7



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

Subgroups	Better off
Atlantic (n=100)	63.2%
Quebec (n=250)	70.6%
Ontario (n=300)	60.5%
Prairies (n=200)	64.1%
British Columbia (n=150)	60.5%
Male (n=484)	72.1%
Female (n=516)	56.3%
18 to 29 (n=174)	61.3%
30 to 39 (n=149)	64.6%
40 to 49 (n=209)	66.5%
50 to 59 (n=222)	60.0%
60 plus (n=246)	66.7%

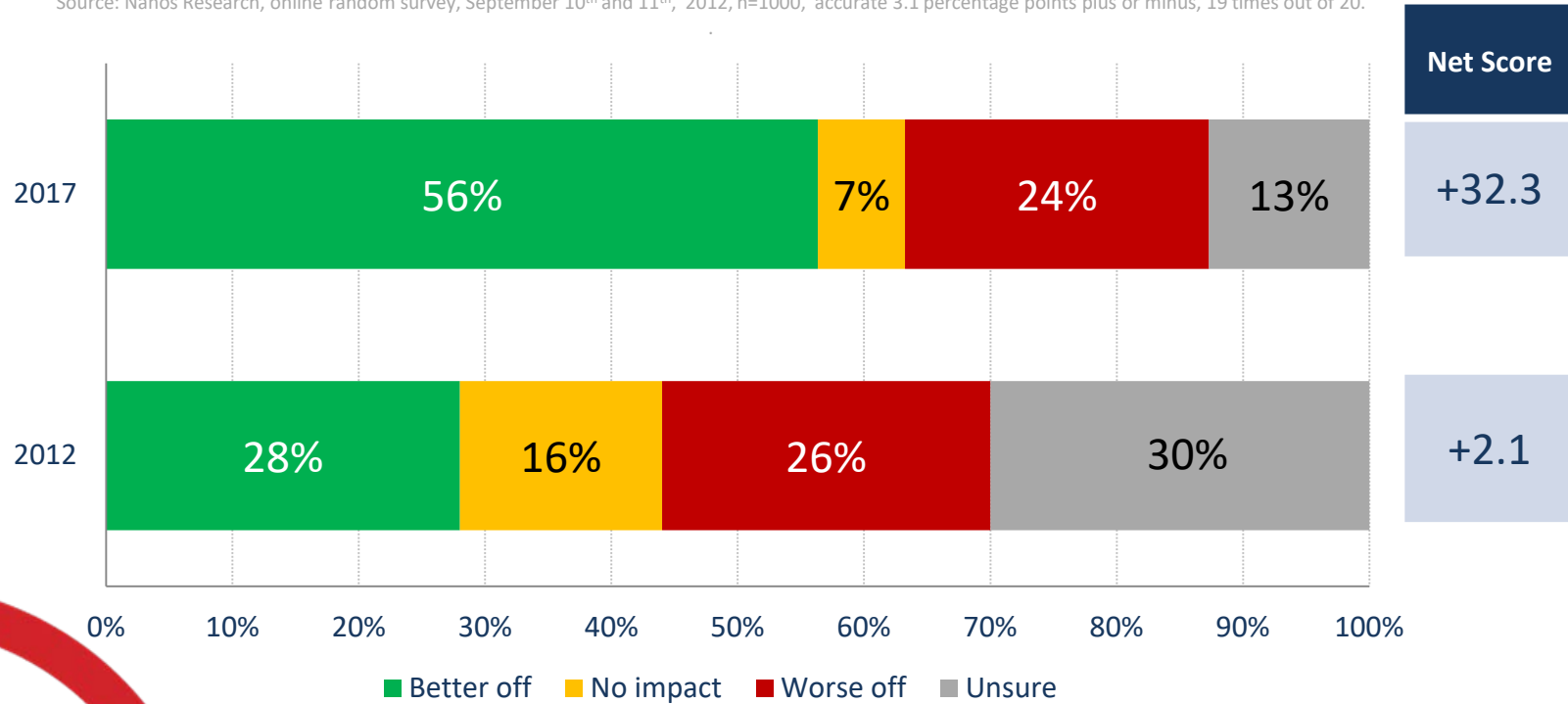
**QUESTION** - Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING]

**The Free Trade Agreement between Canada and the United States**

# The North American Free Trade Agreement

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, online random survey, September 10<sup>th</sup> and 11<sup>th</sup>, 2012, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

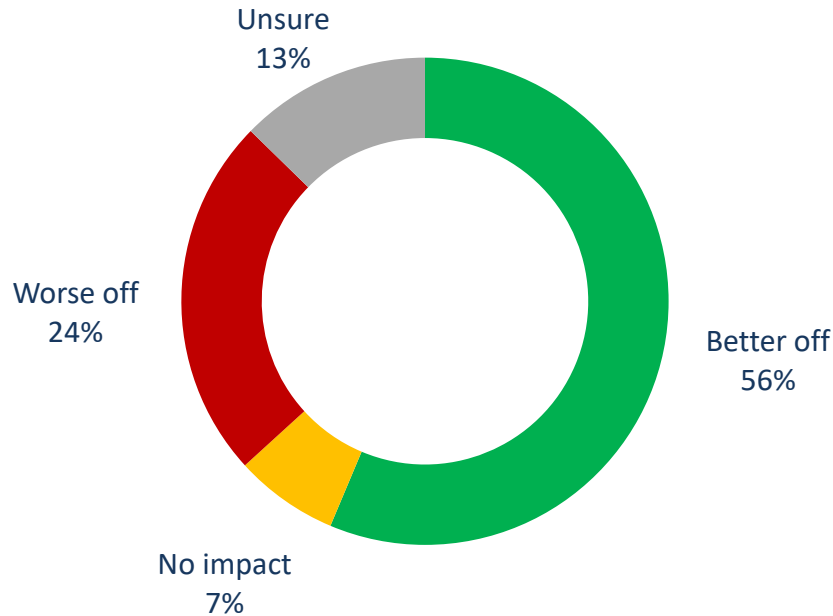
**QUESTION** - Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING]

**The North American Free Trade Agreement between Canada, the United States and Mexico**

# The North American Free Trade Agreement

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

**Net Score**  
+32.3



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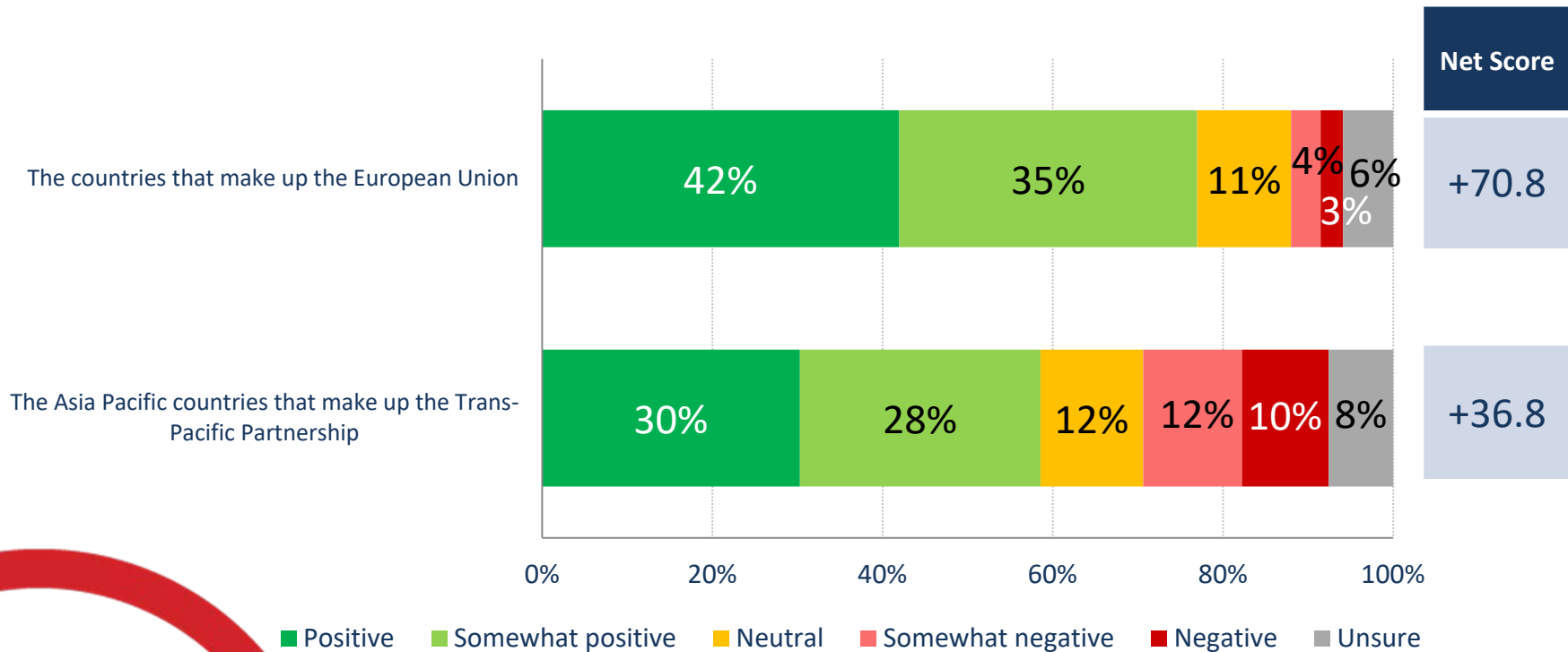
Subgroups	Better off
Atlantic (n=100)	52.8%
Quebec (n=250)	64.1%
Ontario (n=300)	47.7%
Prairies (n=200)	65.8%
British Columbia (n=150)	51.0%
Male (n=484)	58.7%
Female (n=516)	54.3%
18 to 29 (n=174)	57.0%
30 to 39 (n=149)	55.9%
40 to 49 (n=209)	57.6%
50 to 59 (n=222)	52.0%
60 plus (n=246)	58.6%

**QUESTION** - Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING]

**The North American Free Trade Agreement between Canada, the United States and Mexico**

# Potential impacts of new free trade agreements

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

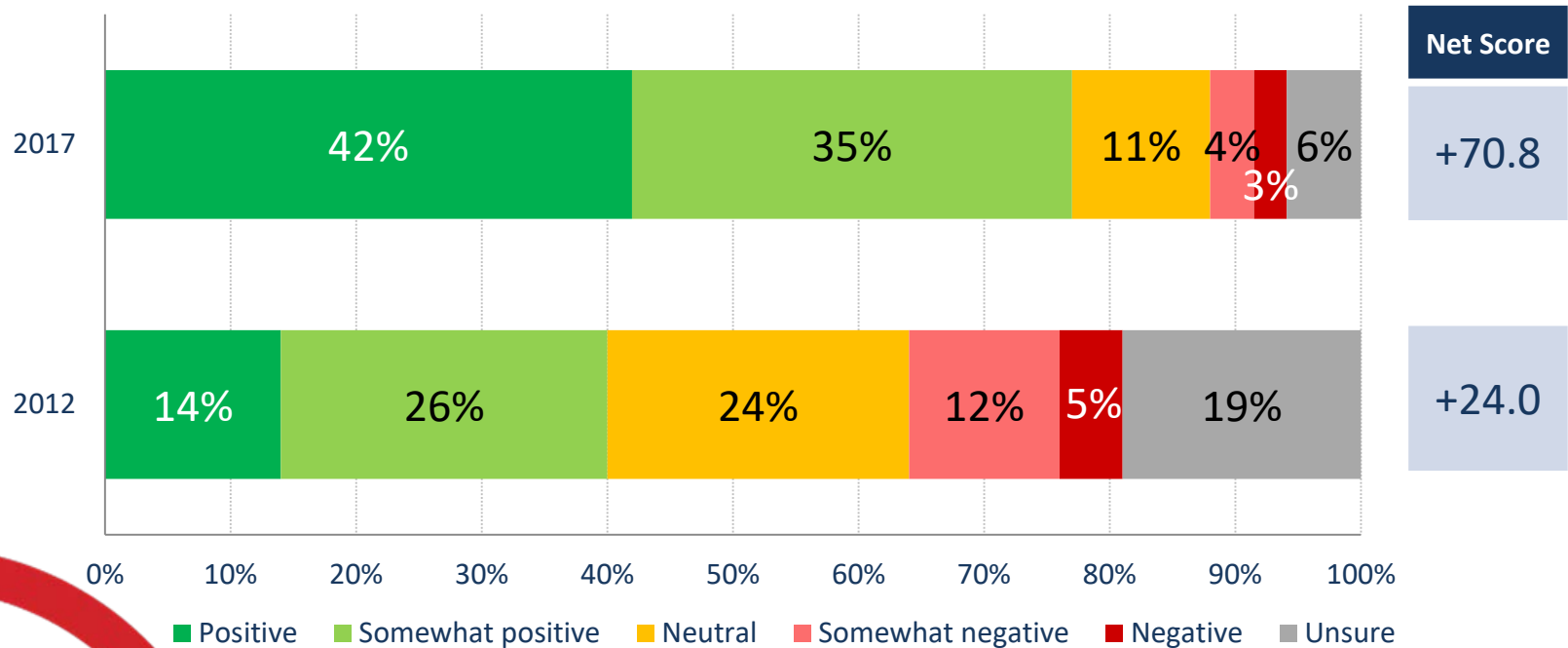
**QUESTION** – Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING]



# Impact of free trade agreements with the EU

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, online random survey, September 10<sup>th</sup> and 11<sup>th</sup>, 2012, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

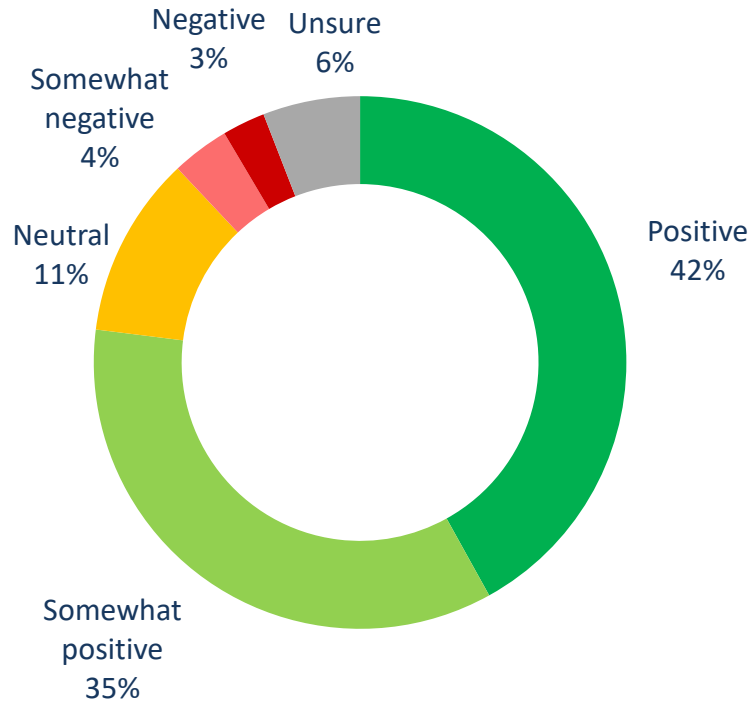
**QUESTION** – Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING]

**The countries that make up the European Union**

# Impact of free trade agreements with the EU

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

**Net Score**  
+70.8



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

Subgroups	Positive/ Somewhat positive
Atlantic (n=100)	79.1%
Quebec (n=250)	75.9%
Ontario (n=300)	72.3%
Prairies (n=200)	83.3%
British Columbia (n=150)	77.8%
Male (n=484)	79.8%
Female (n=516)	74.2%
18 to 29 (n=174)	79.4%
30 to 39 (n=149)	77.1%
40 to 49 (n=209)	75.5%
50 to 59 (n=222)	74.0%
60 plus (n=246)	78.1%

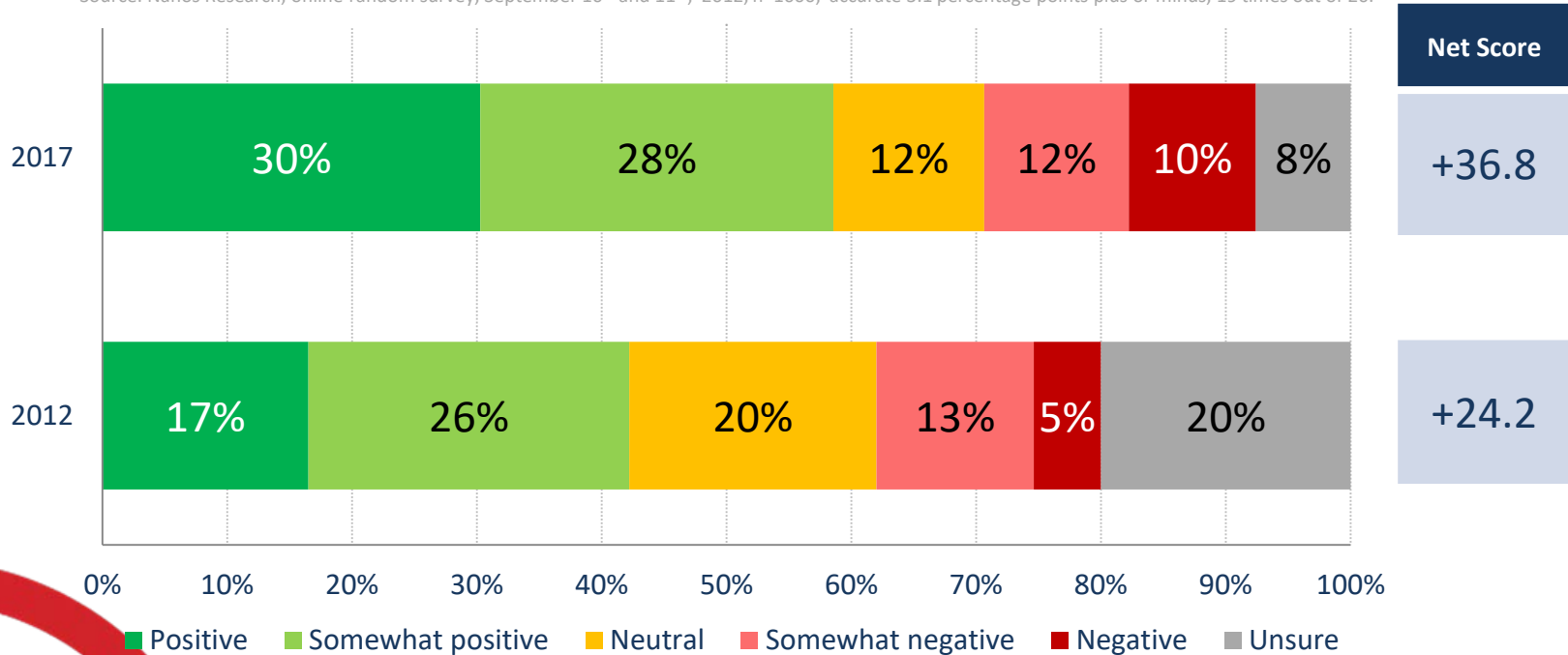
**QUESTION** – Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING]

**The countries that make up the European Union**

# Impact of free trade agreements with Asia Pacific countries

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Source: Nanos Research, online random survey, September 10<sup>th</sup> and 11<sup>th</sup>, 2012, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



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

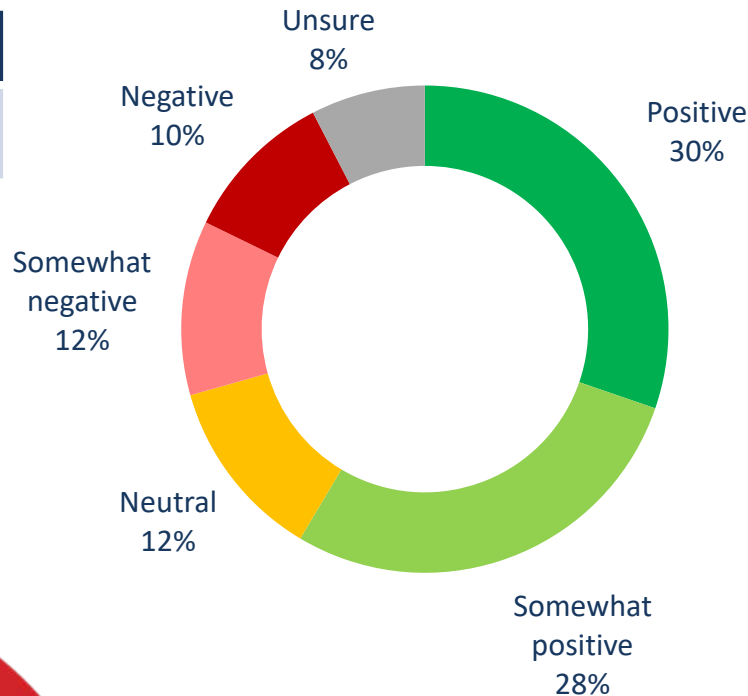
**QUESTION** – Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING]

**The Asia Pacific countries that make up the Trans-Pacific Partnership**

# Impact of new free trade agreements with Asia Pacific countries

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

**Net Score**  
+36.8

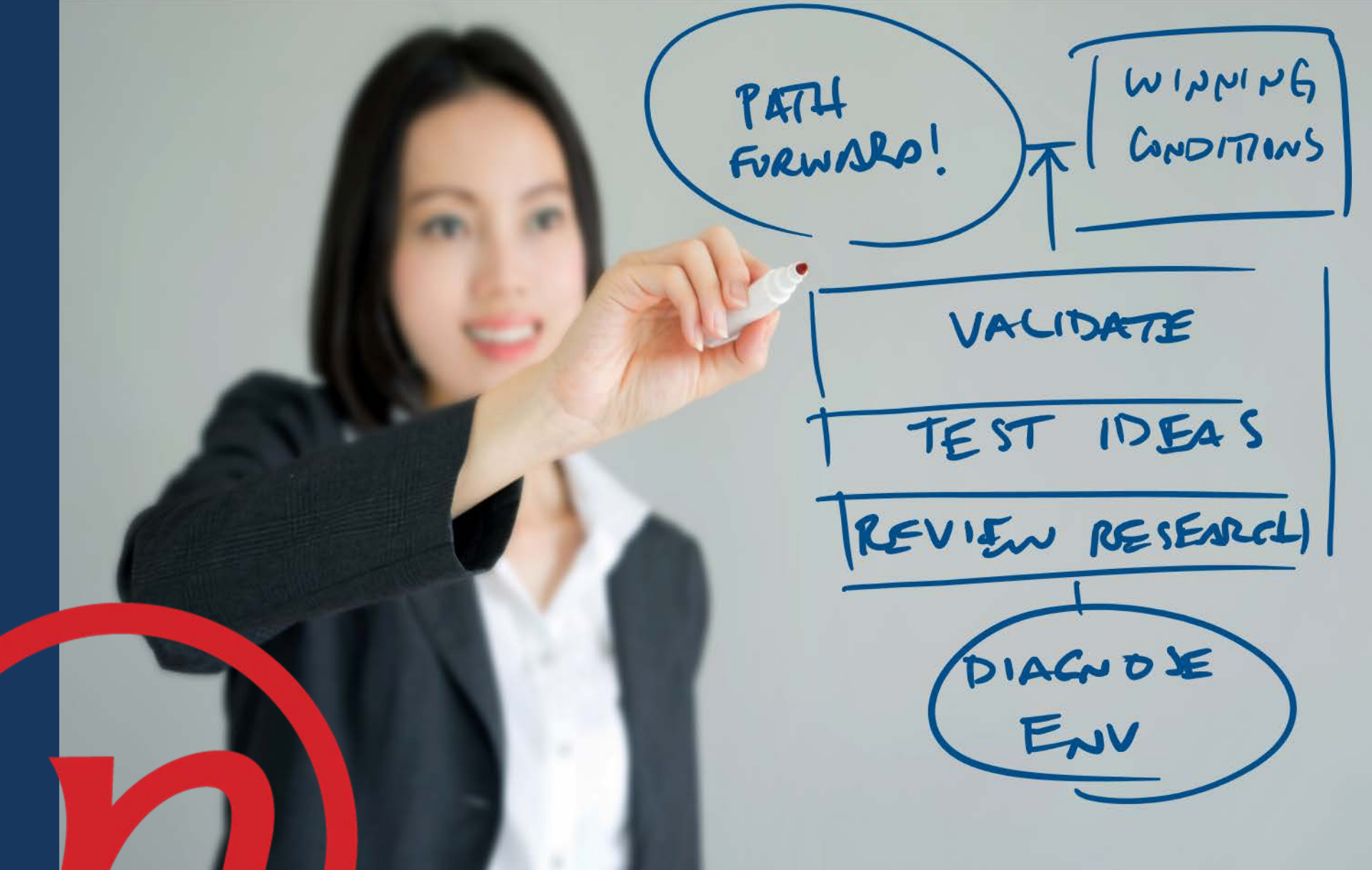


\*Note: Charts may not add up to 100 due to rounding

Subgroups	Positive/ Somewhat positive
Atlantic (n=100)	62.7%
Quebec (n=250)	55.5%
Ontario (n=300)	52.8%
Prairies (n=200)	69.1%
British Columbia (n=150)	58.8%
Male (n=484)	60.1%
Female (n=516)	57.1%
18 to 29 (n=174)	49.2%
30 to 39 (n=149)	63.7%
40 to 49 (n=209)	62.3%
50 to 59 (n=222)	56.4%
60 plus (n=246)	61.4%

**QUESTION** – Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING]

**The Asia Pacific countries that make up the Trans-Pacific Partnership**



# 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 January 28<sup>th</sup> to February 1<sup>st</sup>, 2017 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 sponsored by Nanos Research.

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



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# Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Nanos Research	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) 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	±3.1 percentage 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 (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	13 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 included questions about the top unprompted national issues of concern, Free Trade, the Conservative leadership race, Canada-US relations, and tourism in Canada.
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	January 28 <sup>th</sup> to February 1 <sup>st</sup> , 2017.	Contact	Contact Nanos Research for more information or with any concerns or questions. <a href="http://www.nanosresearch.com">http://www.nanosresearch.com</a> Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		





# Tabulations

Confidential



2017- 979 – Nanos Trade – STAT SHEET

Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING 2012-308]

			Region						Gender		Age				
			Canada 2017-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The Free Trade Agreement between Canada and the United States.	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Better off	%	64.0	63.2	70.6	60.5	64.1	60.5	72.1	56.3	61.3	64.6	66.5	60.0	66.7
	Worse off	%	17.3	15.0	16.1	18.4	14.8	21.9	14.6	19.8	18.7	14.6	14.9	21.3	16.8
	No impact	%	6.5	6.2	3.0	7.0	11.6	4.6	6.5	6.5	5.4	5.5	5.7	9.2	6.6
	Unsure	%	12.2	15.6	10.3	14.1	9.5	13.0	6.8	17.4	14.7	15.3	13.0	9.5	9.8

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 January 28<sup>th</sup> and February 1<sup>st</sup>, 2017. 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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**2017- 979 – Nanos Trade – STAT SHEET**

**Do you think the Canadian economy is better off, worse off or has there been no impact because of the following free trade agreements [ROTATE] [TRACKING 2012-308]**

			Region						Gender		Age				
			Canada 2017-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The North	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
American Free Trade															
Agreement between Canada,		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
the United States and Mexico.															
	Better off	%	56.4	52.8	64.1	47.7	65.8	51.0	58.7	54.3	57.0	55.9	57.6	52.0	58.6
	Worse off	%	24.1	25.9	20.8	31.8	13.6	26.9	25.4	22.8	22.9	17.8	23.7	30.3	24.5
	No impact	%	6.9	4.8	3.7	5.5	13.1	7.9	6.8	6.9	5.8	9.4	5.0	8.2	6.4
	Unsure	%	12.7	16.5	11.4	15.0	7.5	14.3	9.1	16.1	14.2	17.0	13.6	9.5	10.4

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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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Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING 2012-308]

			Region						Gender		Age				
			Canada 2017-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The countries that make up the European Union.	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Positive	%	41.9	41.3	44.5	39.2	43.0	41.9	44.5	39.5	41.1	39.6	45.3	39.6	43.2
	Somewhat positive	%	35.0	37.8	31.4	33.1	40.3	35.9	35.3	34.7	38.3	37.5	30.2	34.4	34.9
	Neutral	%	11.0	7.7	12.7	11.8	9.9	10.6	9.9	12.2	6.9	11.5	12.1	12.3	12.1
	Somewhat negative	%	3.5	6.4	3.1	4.0	3.6	1.3	2.9	4.1	2.4	3.7	4.8	5.6	1.9
	Negative	%	2.6	1.8	.7	5.3	.5	3.4	3.4	1.7	3.2	1.3	2.6	3.3	2.4
	Unsure	%	5.9	5.0	7.6	6.5	2.6	7.0	4.0	7.8	8.2	6.3	5.0	4.8	5.5

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Do you think that new free trade agreements with the following groups of countries would have positive, somewhat positive, neutral, somewhat negative or negative impact on the Canadian economy [ROTATE] [TRACKING 2012-308].

			Region						Gender		Age				
			Canada 2017-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The Asia Pacific countries that make up the Trans-Pacific Partnership.	Total	Unwgt N	1000	100	250	300	200	150	484	516	174	149	209	222	246
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Positive	%	30.3	32.1	30.4	25.4	37.8	28.6	32.5	28.1	25.6	30.7	31.9	30.1	32.4
	Somewhat positive	%	28.3	30.6	25.1	27.4	31.3	30.2	27.6	29.0	23.6	33.0	30.4	26.3	29.0
	Neutral	%	12.1	13.1	13.7	11.1	11.5	11.3	12.5	11.7	7.0	13.4	12.9	13.1	13.6
	Somewhat negative	%	11.6	9.6	14.4	12.1	11.1	7.9	11.7	11.5	13.6	11.9	11.2	14.4	8.1
	Negative	%	10.2	9.2	5.7	16.2	4.9	13.2	11.1	9.3	18.6	3.6	9.6	9.2	9.1
	Unsure	%	7.6	5.4	10.6	7.9	3.5	8.9	4.7	10.3	11.5	7.4	4.0	6.9	7.8

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 January 28<sup>th</sup> and February 1<sup>st</sup>, 2017. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.