

Canadian confidence in Canada's ability to protect its economic interests in NAFTA renegotiations up from 2017

National survey released February, 2018
Project 2018-1154A



THE GLOBE AND MAIL 

 NANOS SURVEY

Summary

A slight majority of Canadians agree or somewhat that Canada holds a lot of leverage or bargaining power that will protect Canadian interests and say that Canada will have a better outcome from the NAFTA negotiations if it forms a united front with Mexico. Over half of Canadians are confident or somewhat confident that if NAFTA were to be renegotiated, Canada could protect its economic interests.

- **Majority of Canadians are confident or somewhat confident that Canada can protect its economic interests if NAFTA is renegotiated** – Just under six in ten Canadians are confident (15%) or somewhat confident (42%) that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated, while nearly four in ten Canadians are not confident (17%) or somewhat not confident (22%). Four per cent are unsure. The frequency of Canadians who are confident or somewhat confident is up slightly from 2017 (confident: 13%, somewhat confident: 33%).
- **Half of Canadians agree or somewhat agree that Canada has a lot of leverage in negotiations to protect its interests** – When asked about their level of agreement that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests, 13 per cent of Canadians say they agree and 38 per cent say that they somewhat agree, while just over two in five Canadians say they disagree (13%) or somewhat disagree (30%). Six per cent are unsure.
- **One in two Canadians say that Canada will be able to negotiate a better outcome from the NAFTA if it forms a united front with Mexico** – When asked which option will help Canada negotiate a better outcome from the NAFTA negotiations, 51 per cent of Canadians say it is better if Canada forms a united front with Mexico to support and defend each other's interests, while 37 per cent of say that it is better for Canada to solely pursue its own interests. Twelve per cent are unsure.

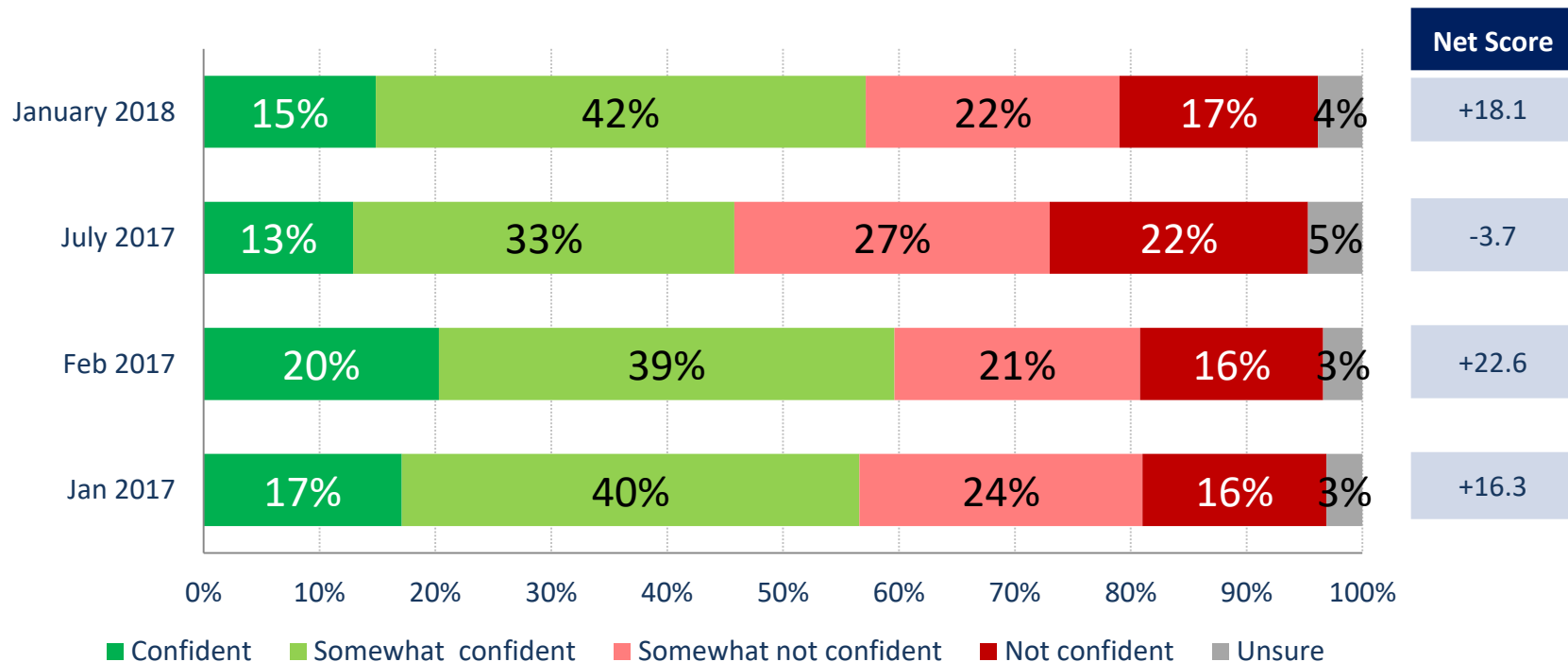
These observations are based on a Nanos RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, conducted between January 28th and February 1st, 2018 as part of an omnibus survey. Participants were randomly recruited by telephone using 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 the Globe and Mail and the research was conducted by Nanos Research.



Protecting Canada's economic interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2018, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.
 Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.
 Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, February 25th to 28th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.
 Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

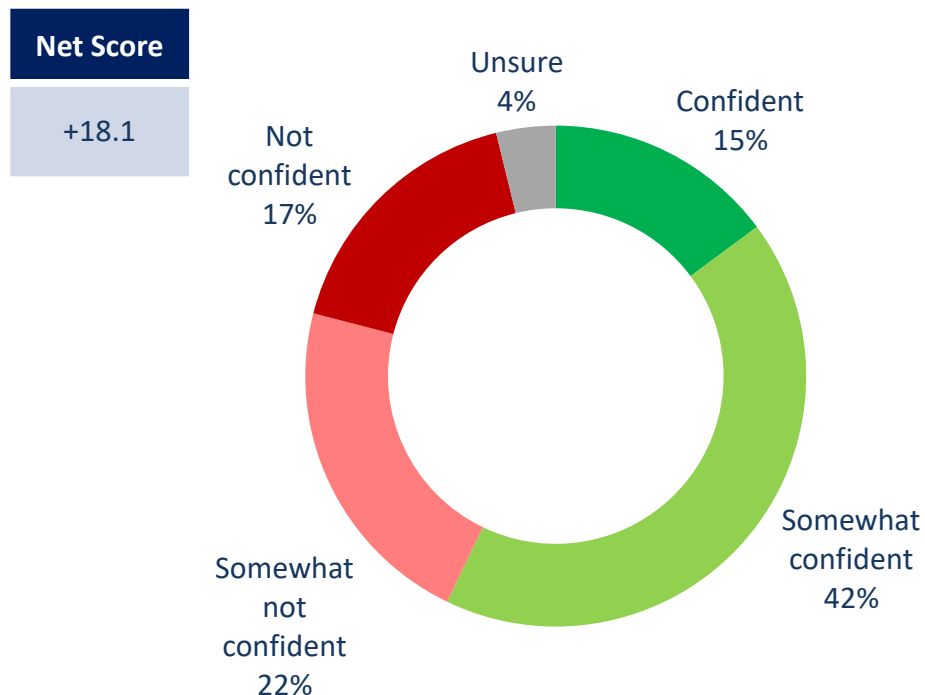


***Note: Charts may not add up to 100 due to rounding**

QUESTION – Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?

Protecting Canada's economic interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2018, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Confident/ Somewhat confident
Atlantic (n=100)	62.7%
Quebec (n=250)	65.5%
Ontario (n=300)	52.7%
Prairies (n=200)	52.9%
British Columbia (n=150)	54.1%
Male (n=496)	56.8%
Female (n=504)	57.5%
18 to 34 (n=221)	54.7%
35 to 54 (n=365)	53.8%
55 plus (n=414)	61.7%

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

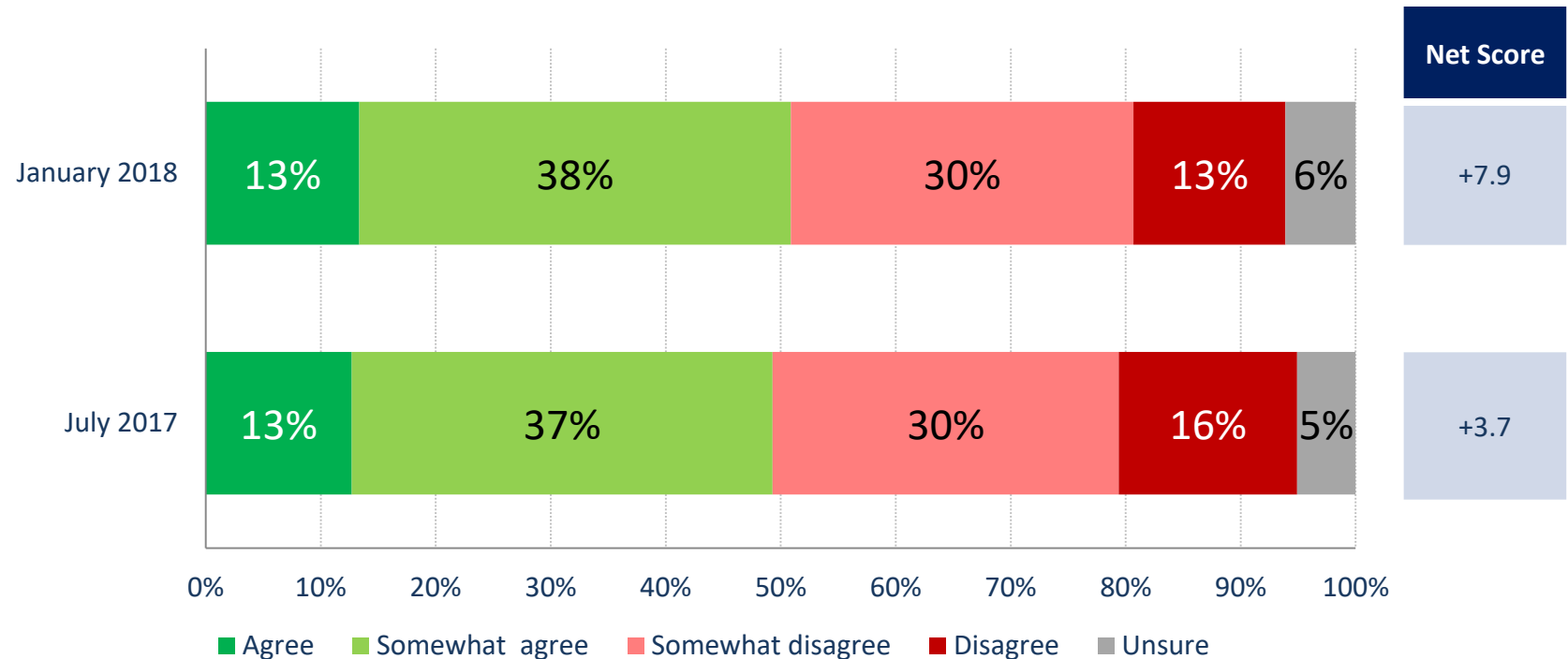
QUESTION – Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?



Bargaining power in negotiations to protect Canadian interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2018, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

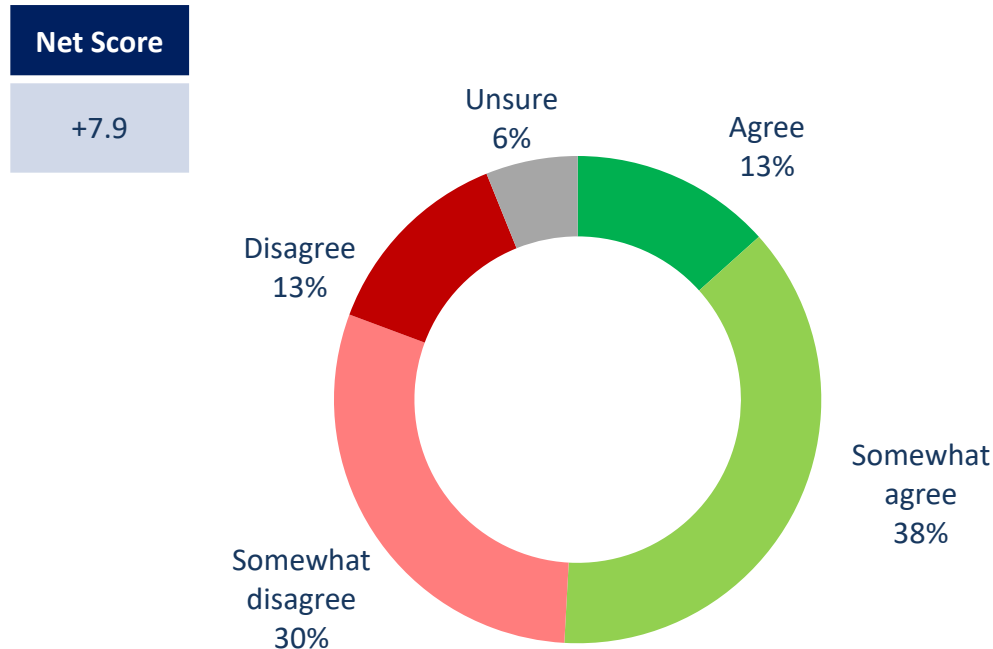


***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests?

Bargaining power in negotiations to protect Canadian interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2018, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	58.8%
Quebec (n=250)	50.0%
Ontario (n=300)	49.5%
Prairies (n=200)	50.7%
British Columbia (n=150)	50.2%
Male (n=496)	51.4%
Female (n=504)	50.4%
18 to 34 (n=221)	51.0%
35 to 54 (n=365)	50.9%
55 plus (n=414)	50.8%

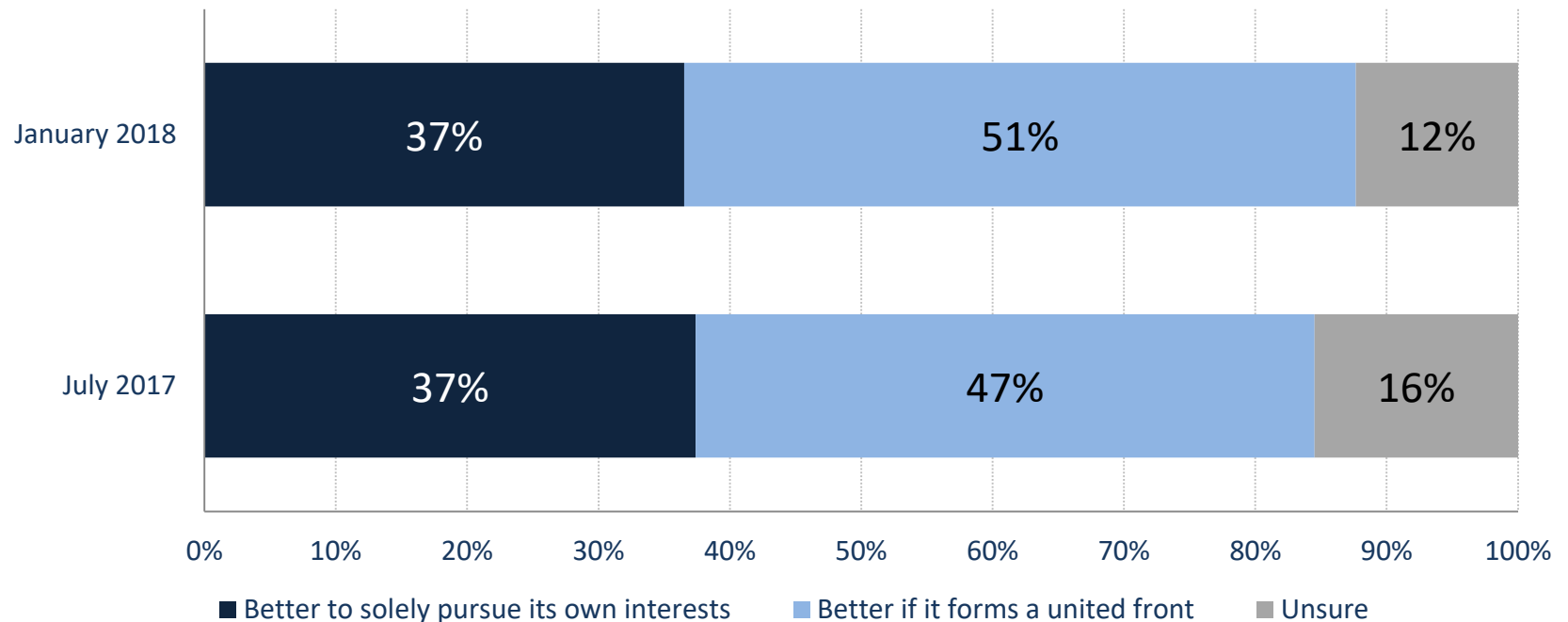
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you agree, somewhat agree, somewhat disagree or disagree that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests?

Canada pursuing own interests or pursuing united front with Mexico in upcoming NAFTA negotiations

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 2018, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23rd to 26th, 2017, n=1000, accurate ± 3.1 percentage points plus or minus, 19 times out of 20.

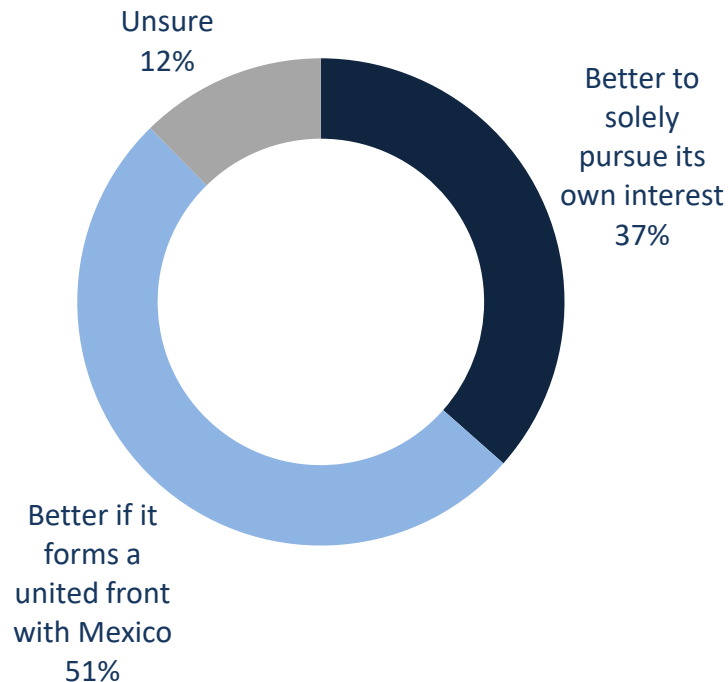


***Note:** Charts may not add up to 100 due to rounding

QUESTION – Will Canada will be able to negotiate a better outcome from the NAFTA negotiations if it solely pursues this country's self-interests or if it forms a united front with Mexico to support and defend each other's interests?

Canada pursuing own interests or pursuing united front with Mexico in upcoming NAFTA negotiations

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28th to February 1st, 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

Subgroups	Better if it forms a united front with Mexico
Atlantic (n=100)	53.6%
Quebec (n=250)	52.7%
Ontario (n=300)	45.6%
Prairies (n=200)	50.1%
British Columbia (n=150)	59.4%
Male (n=496)	48.5%
Female (n=504)	53.7%
18 to 34 (n=221)	52.6%
35 to 54 (n=365)	50.5%
55 plus (n=414)	50.6%

QUESTION – Will Canada will be able to negotiate a better outcome from the NAFTA negotiations if it solely pursues this country's self-interests or if it forms a united front with Mexico to support and defend each other's interests?



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 28th to February 1st, 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 the Globe and Mail 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	Globe and Mail	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 (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.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	11 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 three of an omnibus survey. The preceding modules related to top issues of national concern, federal job funding, Olympics, and trade agreements.
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	January 28 th to February 1 st , 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.



Tabulations

2018-1154A – Globe and Mail/Nanos Survey – January Omnibus NAFTA – STAT SHEET

			Region						Gender		Age		
			Canada 2018-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?	Total	Unwgt N	1000	100	250	300	200	150	496	504	221	365	414
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Confident	%	14.8	14.1	14.6	15.2	14.8	15.2	16.0	13.7	16.8	12.9	15.2
	Somewhat confident	%	42.3	48.6	50.9	37.5	38.1	38.9	40.8	43.8	37.9	40.9	46.5
	Somewhat not confident	%	21.9	22.2	19.0	22.5	23.7	22.9	22.1	21.7	24.5	24.4	17.9
	Not confident	%	17.1	11.0	11.6	19.7	21.2	19.9	18.4	16.0	15.9	18.5	16.8
	Unsure	%	3.8	4.1	4.0	5.1	2.3	3.0	2.8	4.8	4.9	3.2	3.6

			Region						Gender		Age		
			Canada 2018-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Do you agree, somewhat agree, somewhat disagree or disagree that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests?	Total	Unwgt N	1000	100	250	300	200	150	496	504	221	365	414
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	13.4	14.2	11.4	15.2	11.9	14.4	13.3	13.4	16.1	11.9	12.7
	Somewhat agree	%	37.5	44.6	38.6	34.3	38.8	35.8	38.1	37.0	34.9	39.0	38.1
	Somewhat disagree	%	29.8	26.4	33.0	27.5	28.3	33.3	29.0	30.6	29.0	30.8	29.6
	Disagree	%	13.2	9.9	8.7	15.0	18.7	12.1	15.1	11.5	15.3	12.3	12.6
	Unsure	%	6.1	4.8	8.3	8.1	2.3	4.4	4.6	7.6	4.8	6.0	7.1

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 28th and February 1st, 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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2018-1154A – Globe and Mail/Nanos Survey – January Omnibus NAFTA – STAT SHEET

			Region						Gender		Age		
			Canada 2018-01	Atlantic	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Will Canada will be able to negotiate a better outcome from the NAFTA negotiations if it solely pursues this country's self-interests or if it forms a united front with Mexico to support and defend each other's interests?	Total	Unwgt N	1000	100	250	300	200	150	496	504	221	365	414
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Better to solely pursue its own interests	%	36.5	34.3	35.0	40.9	39.6	27.8	42.4	30.9	34.1	35.2	39.4
	Better if it forms a united front	%	51.1	53.6	52.7	45.6	50.1	59.4	48.5	53.7	52.6	50.5	50.6
	Unsure	%	12.3	12.2	12.3	13.6	10.3	12.8	9.1	15.5	13.2	14.3	10.0

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