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Statement of Political Neutrality

I hereby certify as Senior Officer of that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications - Appendix C (Appendix C: Mandatory Procedures for Public Opinion Research).

Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leaders.


Signed:  PUBLISHER

Table of Contents

Summary Findings	3
Methodology.....	4
Detailed Findings.....	5
Canada U.S. Trade.....	5
Areas of Cooperation between Canada and the U.S. (top three).....	6
First Priority.....	6
Second Priority.....	7
Third Priority.....	9
Perceptions of Canada	10
Appendix One	12
Canada-U.S Decision-Makers Survey Questionnaire	12

Table of Figures

Figure 1: <i>Do you believe that free trade between the United States and Canada has had a positive or negative impact on the United States?</i>	5
Figure 2: <i>Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017 (top area)?</i>	6
Figure 3: <i>Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017 (second area)?</i>	7
Figure 4: <i>Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 20179 (third area)?</i>	9
Figure 5: Levels of Agreement Statements about Canada.....	10

Executive Summary

Summary findings

The key objectives of this research were: to better understand how the strategies and related messaging of the North American Branch resonate with the target audience; to establish a baseline on how Canadian policies on the environment, trade and security are perceived by the target audience, and; to obtain data that will inform new processes in future advocacy campaigns in the United States (U.S.).

American decision-makers hold very positive views about Canada-U.S. trade with close to all survey respondents expressing the view that Canada-U.S. trade has been positive and close to three-quarters of respondents saying trade has been very positive.

Survey participants were then asked to prioritize three choices about areas of cooperation between Canada and the U.S. The environment is the most important top priority item for cooperation. By over a two-to-one margin, survey respondents choose environment/climate change over the next top priority counter-terrorism and security cooperation, followed by trade agreements and the flow of goods across the border.

When asked for their second choice, the environment remains top of the pile, statistically tied with energy and trade agreements. Only as a third choice does the environment take a back seat to counter-terrorism and security, together with energy followed by trade agreements.

When asked about levels of agreement with statements made about Canada, the results are overwhelmingly positive in most cases. Nearly all surveyed agree that “Canada is a vital trading partner for the U.S.” with over eight-in-10 saying they strongly agree. Likewise, nearly all respondents agree that “Canada is a trusted security and defense partner” with close to nine-in-10 expressing strong agreement.

While close to nine-in-10 agree with the statement “the rules governing trade between the U.S. and Canada are fair”, the proportion of respondents saying they strongly agree with it falls by 31 points when compared with previous statements. In a similar fashion, eight-in-10 agree with the statement “the United States’ northern border with Canada is secure.” However, just over one half strongly agree with this statement.

Agreement with the statement “Canada offers compelling investment opportunities” (at 76% overall) is quite shallow by comparison, as under three-in-10 strongly agree with it. This is considerably lower than for any other statement. Only those that strongly agree would

seriously consider investing themselves, or recommend to others that Canada is a good place to invest.

Three-quarters believe that environmental considerations factor into Canada's political decision-making, though only one-third strongly agree. Finally, close to seven-in-10 believe that "Canada is the most important energy supplier to the U.S." with only one third in strong agreement.

The total cost of the research was \$24,998 (CAD). The planned use of the two waves was to measure the efficacy of the advocacy campaign on the environment, trade and security with Canada's largest trading partner. Additionally, it would have established linkages between the advocacy campaign and shifts in the public perceptions of U.S. decision-makers.

The results from the first wave reveal an overwhelming positive attitude towards trade and some of the progressive items that Canada has recently proposed in the renegotiation of the North American Free Trade Agreement. This suggests that the survey sample (target audience) did not target those who were neutral or somewhat opposed to free trade, as had been outlined in the contract. As a result, the contract was cancelled before the second wave commenced. The findings of this report are from the first wave only, which makes any assessment about the efficacy of the advocacy campaign impossible.

Methodology

Global Affairs Canada commissioned Foreign Policy (FP) magazine to conduct an online survey of its readership, which is comprised of American senior policy makers, media leaders, academics, think tank leaders and other influential stakeholders. The full readership (Universe) consists of 1.2 million users. A series of screening questions were asked up front to ensure that the sample matched the target audience.

FP completed 1,039 interviews with its registered user base using a pop-up system between February 07 and March 08, 2017. The sample remained unweighted, as it closely matched the profile of the readership the department hoped to capture. The sample is also one of non-probability and the results cannot be extrapolated to any broader population.

Detailed Findings

Canada-U.S. Trade

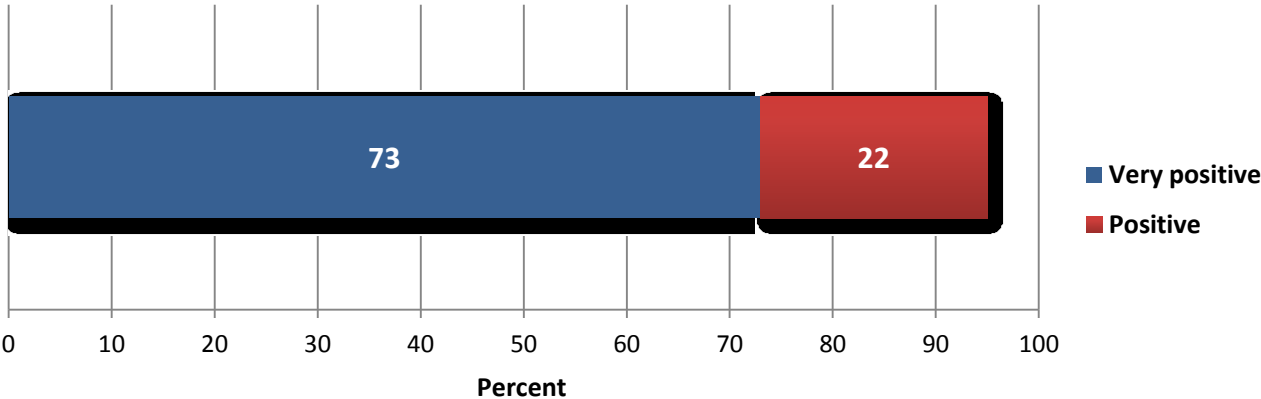
While 95% say that trade between the U.S. and Canada has been positive for America, nearly three quarters of respondents (73%) believe that the trading relationship has been very positive.

Survey respondents who work in academia, industry, non-governmental organizations (NGOs) and media (75%) are more inclined than those in advertising and marketing (62%) and public service (government), at 67%, to say that free trade between Canada and the U.S. has been very positive. Those respondents with a postgraduate university education (76%) are also more likely than those with an undergraduate degree or less (69%) to view free trade as very positive.

Respondents who travel to Canada yearly (76%) tend to view Canada-U.S. free trade very positively, at 76%. Citizens of the U.S. (73%) lean more towards a very positive view of trade between both countries than non-citizens, at 64%.

Figure 1

Do you believe that free trade between the United States and Canada has had a positive or negative impact on the United States?



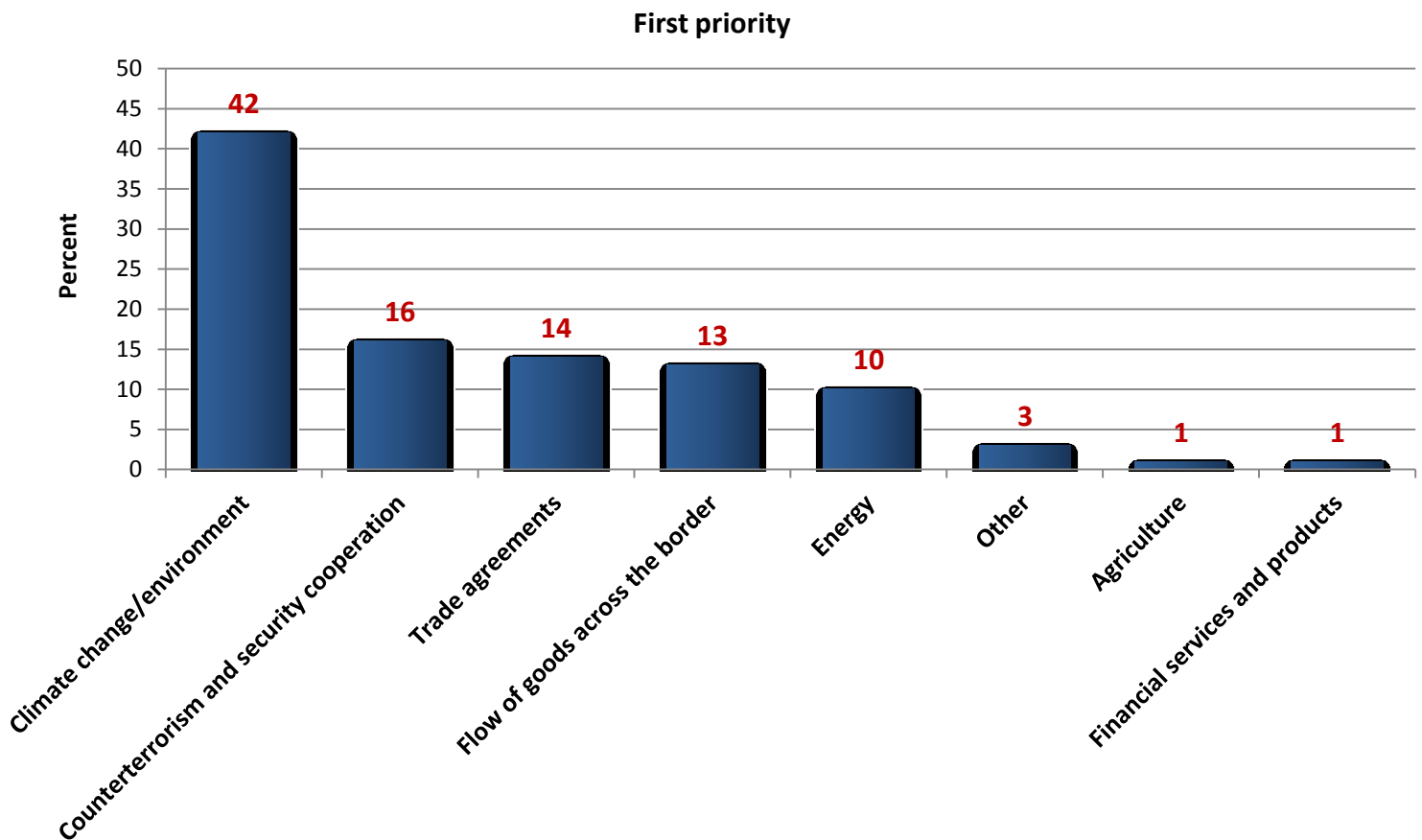
Areas of Cooperation between Canada and the U.S. (top three)

First Priority

When asked about first priorities in areas of cooperation, respondents are far more likely to cite the environment, at 42%, followed by counterterrorism and security (16%), trade agreements (14%), the flow of goods across the border (13%) and energy (10%).

Figure 2

Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017?



Those working in academia, the media and advertising/marketing are more inclined to view the environment as a top priority, at 51%, whereas those working for government or industry tend to be less enthusiastic by a significant margin (35%). Levels of education have no difference among them, but those who do not conduct business with Canada, at 44%, are more animated about the environment than those who do (34%).

Those in government and industry are most apt to see counterterrorism and security cooperation as a first choice priority over those working in academia, media,

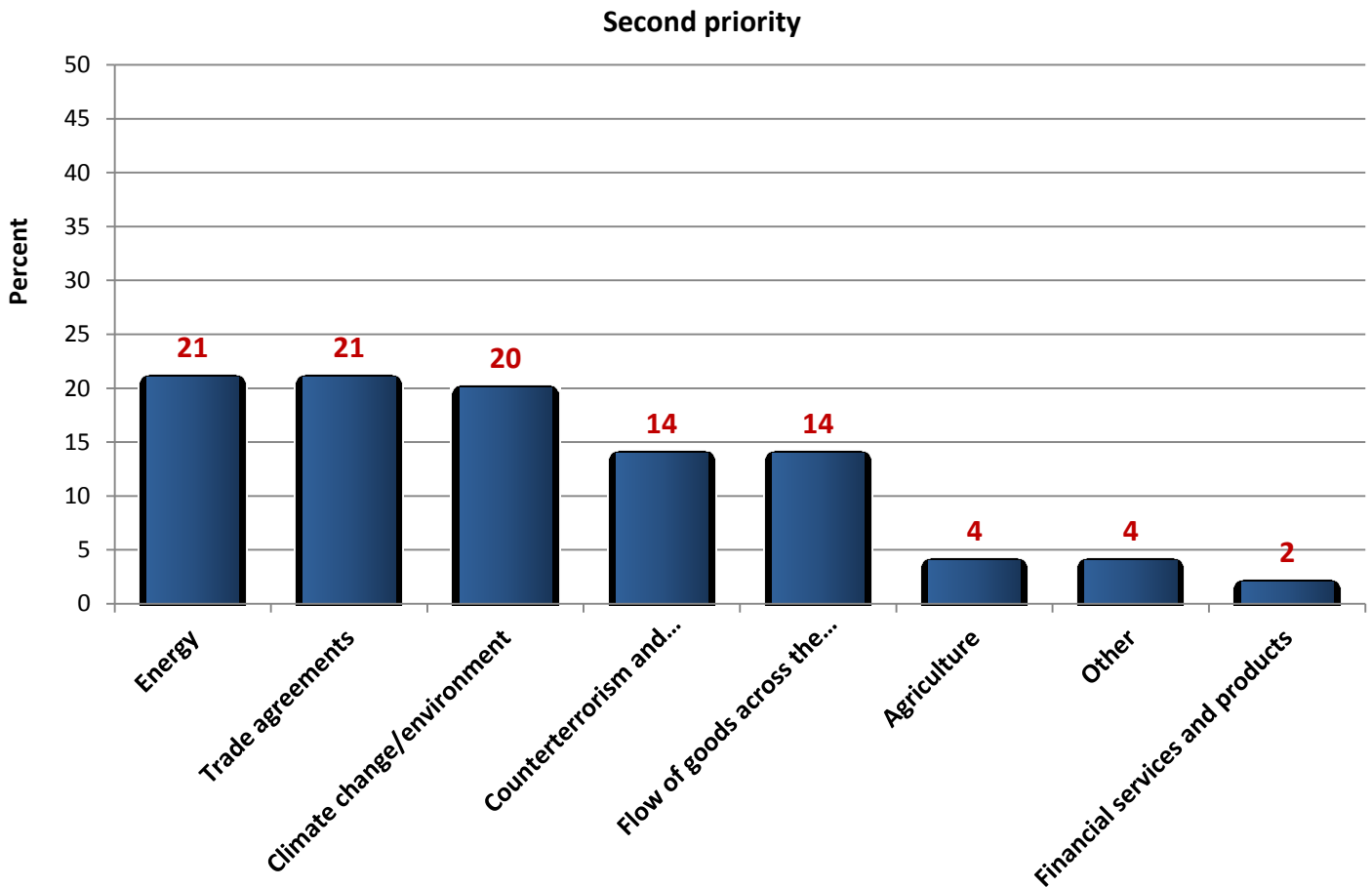
advertising/marketing and NGOs. Respondents working in media (5%) are the least likely to perceive the flow of goods across the border as a first-choice priority, whereas the other vocational groups are more likely to view it as important (14%).

Second Priority

As a second priority, energy and trade agreements are tied in top spot (21% each), followed by the environment (20%), counterterrorism/security with the flow of goods across the border are tied in third spot, at 14% each, and agriculture is at 4%.

Figure 3

Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017?



Survey respondents working in the field of advertising/marketing are most likely, at 26%, to cite energy as their second priority; however, those working in the public sector are least likely to view energy this way (19%).

While there is little variation across the vocational sub-groups on trade agreements, those who travel to Canada daily-to-bi-annually, at 13%, are significantly less inclined to cite trade agreements as a second tier priority than those who identify travel to Canada as non-applicable in the survey, at 25%.

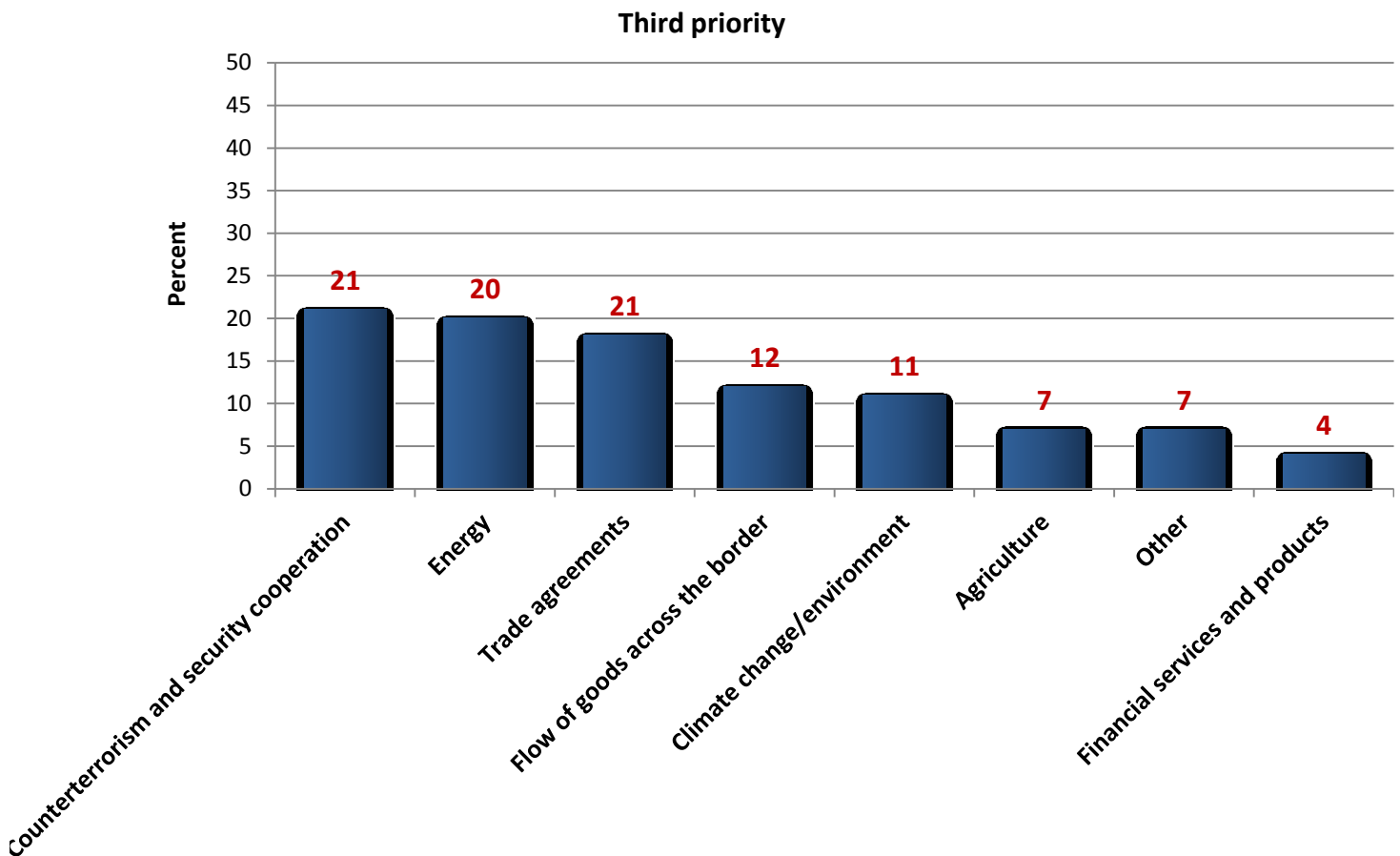
Climate change/environment is highest among the NGO sub-group as a second priority (29%), whereas it is only at 19% for the other vocational sub-groups.

Third Priority

One-in-five respondents choose counterterrorism and security as their top third choice, at 21%. This is closely followed by energy (20%) and trade agreements (18%). The flow of goods across the border is at 12%, with the environment on its tail, at 11%, and agriculture down at 7%.

Figure 4

Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017?



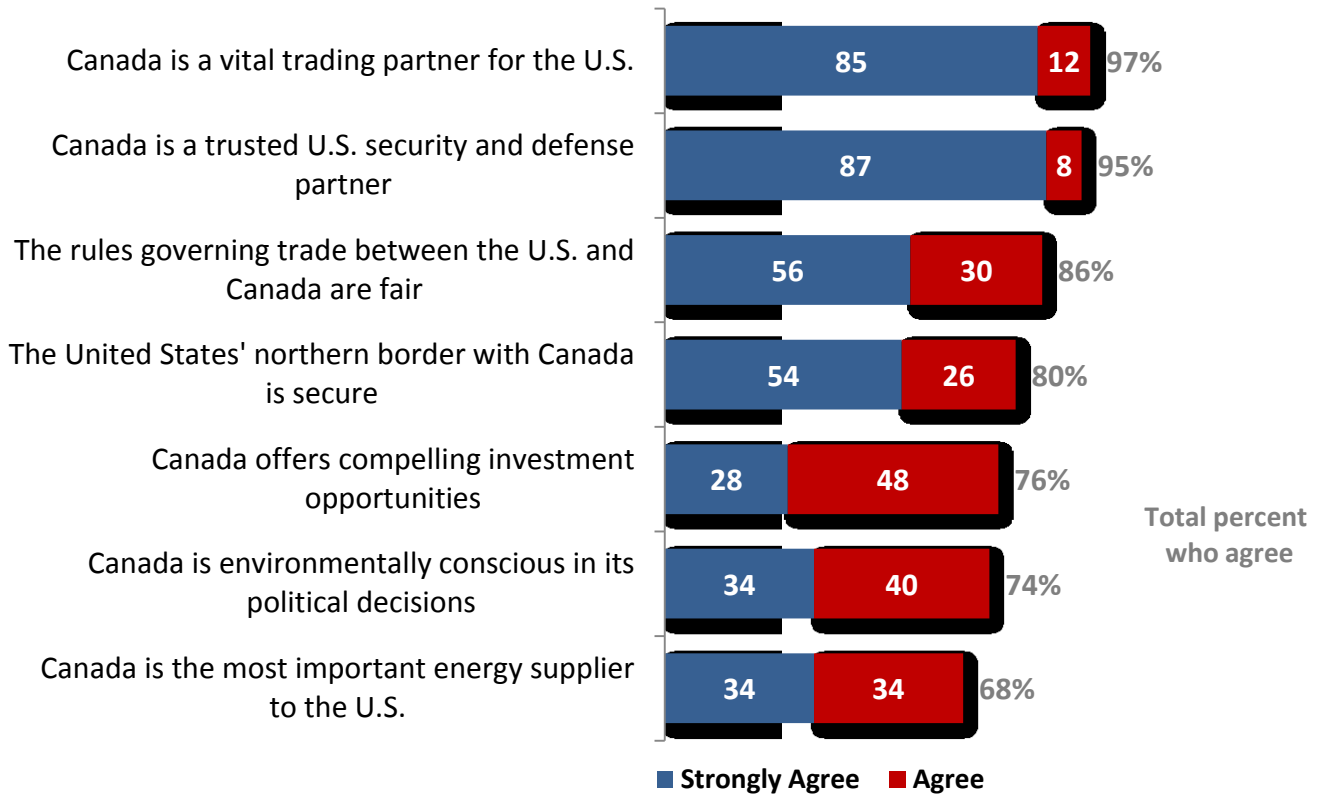
Non U.S. citizens are far more likely to cite energy as their third choice, at 36%, than U.S. citizens (20%).

Survey respondents working in advertising/marketing (8%) are significantly less inclined than the other vocational sub-groups (20%) to mention trade deals as their third choice priority.

Perceptions of Canada

Figure 5

Levels of Agreement Statements about Canada



Respondents were provided with a series of statements and asked to what level they agree or disagree with each one.

The results reveal that 97% believe that Canada is a vital trading partner for the U.S., with 85% agreeing strongly. Respondents working in marketing/advertising are most apt to strongly agree (92%) with this statement, followed by those in media (88%), academia (87%), the public sector (85%) with NGOs and industry at 83% each. Those who travel to Canada daily are more likely to strongly agree (93%) that Canada is a vital trading partner than those who travel yearly, never, or say non-applicable, at 84%.

Ninety-five per cent agree with the statement that “Canada is a trusted U.S. security and defense partner”, with 87% agreeing strongly. Non U.S. citizens (93%) are also more inclined than U.S. citizens (87%) to strongly agree that Canada is a trusted partner on defence and security issues. Additionally, those working in media (97%) tend to register a strongly agree than those in the other vocational groups, at 87%.

Close to nine-in-10 (86%) agree that “the rules governing trade between the U.S. and Canada are fair”, with 56% agreeing strongly. Respondents working in media and NGOs, at 63%, are more likely to assign very strong agreement with the fair trade rules statement compared to 55% for the other vocational groups.

Four-in-five (80%) state that the Canada-U.S. border is secure: over one half (54%) agree strongly. Survey respondents working in academia and with NGOs (62%) are more inclined to concur strongly than the other vocational cohorts, at 49%.

Just over three-quarters (76%) agree with the statement that “Canada offers compelling business opportunities”; however, significantly fewer survey respondents (28%) are apt to strongly agree with this statement. Those working in Industry (25%) and advertising/marketing (23%) are the least likely to strongly agree that Canada is an attractive place to invest when compared to the other vocational sub-groups, at 31%. Survey respondents currently doing business with Canada, at 24%, are less likely to strongly agree that Canada is a good investment target than those who do not have business dealings here (30%).

Almost three quarters (74%) concur with the statement that “Canada is environmentally conscious in its political decisions” with 34% in strong agreement. American citizens, at 35%, tend to strongly agree more than non-U.S. citizens, at 14%. Also, those working in advertising/marketing, at 26%, are much less inclined to strongly agree than those working in the other vocational sub-groups (36%).

Over two-thirds (68%) agree that “Canada is the most important energy supplier to the U.S.” Thirty-four per cent agree strongly with this statement. Survey respondents working either in advertising/marketing or NGOs (29%) are less likely to strongly agree with the aforementioned statement than those in the other vocational cohorts (35%).

Appendix One

Canada-U.S. Decision-Makers Survey Questionnaire

Introduction

- This survey is being undertaken by Foreign Policy Magazine on behalf of the Government of Canada, to gain a better understanding of American perceptions of Canada.
 - It is entirely voluntary, confidential, and anonymous.
 - The survey consists of eight questions and will take, on average, 12 minutes to complete.
 - Do you consent to take the survey?
1. Are you a citizen of the United States of America?
 - a) Yes, I am a citizen of the USA and currently reside in the USA.
 - b) Yes, I am a citizen of the USA, but I do not currently reside in the USA.
 - c) No I am not a citizen of the USA. → **TERMINATE**
 2. Which of the following best describes the industry that you work in or are affiliated with?
 - a) Government (all levels)
 - b) Industry (manufacturing, services, technology, etc.)
 - c) Academia
 - d) Media
 - e) Advertising and / or Marketing
 - f) Non-Governmental Organization (NGO)
 - g) Other → **TERMINATE**
 3. What is the highest level of education you have obtained?
 - a) High School Degree
 - b) Community College Certificate or Diploma
 - c) University Undergraduate Degree
 - d) University Graduate Degree
 - e) University Post-Graduate Degree
 - f) Other → **TERMINATE**
 4. Do you currently do business with Canada (i.e. Canadian companies or organizations)?
Yes/No
 5. How often do you travel to Canada?
 - a) Daily
 - b) Weekly (at least once a week)
 - c) Monthly (at least once a month)
 - d) Quarterly (at least once every 3 months)

- e) bi annual (at least once every 6 months)
 - f) Yearly (at least once a year)
 - g) Never
 - h) Not Applicable
6. Do you believe that free trade between the United States and Canada has had a positive or negative impact on the United States? [10-point scale where 1 is very negative and 10 very positive]
7. Which top 3 areas of cooperation do you think the U.S. and Canada should prioritize in 2017? Please rank them in order where 1 is the highest priority, 2 is the second-highest priority, and 3 is the third-highest priority.
- a) Trade agreements
 - b) Climate change/environment
 - c) Energy
 - d) Counterterrorism and security cooperation
 - e) Agriculture
 - f) Financial services & products
 - g) Flow of goods across the border
 - h) Some other area of cooperation? (please specify)
- [Randomize; always display h last]
8. Overall, to what extent do you agree or disagree with the following statements about Canada on a scale from 1 to 10, where 1 means strongly disagree and 10 means strongly agree?
- a) Canada offers compelling investment opportunities.
 - b) Canada is a vital trading partner for the U.S.
 - c) Canada is the most important energy supplier to the U.S.
 - d) Canada is environmentally conscious in its political decisions.
 - e) The United States' northern border with Canada is secure.
 - f) Canada is a trusted US security and defense partner.
 - g) The rules governing trade between the United States and Canada are fair.
- [Randomize]