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## **Executive Summary**

*Ce sommaire est également disponible en français*

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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

## Executive Summary

### Summary findings

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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

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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.