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Canadian Attitudes towards International Trade

Final Report

Prepared for the Global Affairs Canada

Supplier name: EKOS Research Associates

Contract number: 08873-190541/001/CY

Contract Award Date: January 21, 2020

Delivery date: March 12, 2020

Registration number: 072-19

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Canada 

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March 2020

This report summarizes results from a survey of 2,089 Canadians.

Cette publication est aussi disponible en français sous le titre: Attitudes des Canadiens à l'égard du commerce international

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Catalogue number: FR5-174/2020E-PDF

International Standard Book Number (ISBN): 978-0-660-35882-6

Related publications (registration number: POR 072-19):

Catalogue Number: FR5-174/2020F-PDF (Final Report, French)
ISBN: 978-0-660-35883-3

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EXECUTIVE SUMMARY

This research took place between February 6 and February 19, 2020, before the majority of Canada's actions to prevent the spread of COVID-19 were announced. Canada's efforts to control and mitigate the spread of the virus have resulted in travel restrictions, temporary border restrictions, and could have further implications on international business development activities. These efforts could affect public attitudes toward trade. All results must be viewed with this in mind. We propose ongoing POR to continue to gauge public attitudes over time.

Background and Methodology

In alignment with the Trade Diversification Strategy, Global Affairs Canada (GAC) is pursuing efforts to help Canada diversify its trade abroad. This strategy includes efforts to advance an inclusive approach to trade that seeks to ensure that the benefits and opportunities from trade are more widely shared among all Canadians. In support of these efforts, a baseline survey of Canadians was conducted to provide trade communicators with a clear view of public attitudes toward trade, to help inform messaging and communications (including products such as speeches, interview briefs, news releases, and social media).

This research involved a survey of 2,089 Canadians 18 years of age and older. Fieldwork took place from February 6 to February 19, 2020. The survey was conducted primarily online using our probability-based online panel, Probit. However, to help with coverage of Canadians who do not have internet access, some interviews were conducted by telephone. In total, 1,588 cases were collected online and 501 were collected by telephone. Survey results were weighted based on Statistics Canada data according to age, gender, and region to ensure the sample is representative of the Canadian general public aged 18 years and over. The margin of error associated with the total sample is +/- 2.1 percentage points, 19 times out of 20.

Survey Findings

Outlined below are key findings from this study. The remainder of this report describes survey results in more detail.

General Trade Issues

Results suggest that international trade is a popular topic in the media. Fully three-quarters of respondents (75 per cent) recall hearing news about international trade, an 11-point increase from 2001. The plurality of these respondents recall news related to the Canada-United States-Mexico Agreement (CUSMA).

When respondents were asked to rate the importance of various goals in Canada's approach to international trade, economic issues top the list, with nine in ten respondents rating job creation (93 per cent), support for Canadians businesses (90 per cent), and innovation (90 per cent) as key priorities. However, other trade goals are also assigned high importance by Canadians: more than eight in ten assign a high degree of importance to ensuring that Canada's environmental and health standards are respected (88 per cent), supporting Canada's agricultural sector (85 per cent), protecting Canadian intellectual property (85 per cent), ensuring that everyone benefits from trade (82 per cent), and diversifying Canada's export markets (82 per cent). Canadians attach comparatively less importance to promoting gender equality (64 per cent), offering consumers the widest possible choice of products and services at the lowest prices (62 per cent), and increasing foreign direct investment in Canada (55 per cent).

Results suggest Canadians are generally familiar with Canada's key trading partners. When asked to identify the five leading markets for Canadian exports, the vast majority of respondents (86 per cent) recognize the United States as Canada's largest export market, while three-quarters (75 per cent) see China as an important market. Just over four in ten cited Mexico (45 per cent) and Europe (42 per cent) as key markets for Canadian exports. One-third (32 per cent) listed the United Kingdom, while one-quarter (26 per cent) mentioned Japan.

When asked to identify Canada's two largest export sectors, seven in ten (70 per cent) listed natural resources/energy and half (50 per cent) mentioned agricultural products.

Benefits of International Trade

Results suggest Canadians widely feel that trade has become more important over the past ten years. Roughly eight in ten respondents (83 per cent) say trade has grown in importance, while just three per cent believe it is becoming less important.

However, results also reveal that Canadians are divided on who primarily benefits from international trade. Just over half of respondents (54 per cent) believe that trade benefits most Canadians in the form of jobs, tax revenue, and a better selection of good and services. Four in ten

(42 per cent), however, hold the more negative view that the benefits of international trade are enjoyed almost exclusively by large corporations and wealthy investors.

That said, when asked to rate the extent to which various groups benefit from international trade, Canadians are much more likely to identify large businesses as the biggest winners. Indeed, nine in ten Canadians (91 per cent) say large businesses benefit to a great extent from international trade, whereas just under half feel that small- to medium-sized enterprises and community businesses benefit to the same extent (47 per cent and 46 per cent, respectively). Four in ten (38 per cent) feel they personally benefit from international trade and only one-third believe women or youth have benefited from international trade (32 per cent each). Even fewer feel LGBTQ2 communities or Indigenous people have benefitted from trade (18 per cent each).

Canada's Brand

When asked to identify the qualities for which Canadian products are best known internationally, two-thirds (68 per cent) say our products are best known for their high quality. Just over half (55 per cent) say Canadian goods are defined by Canada's fair labour practices, while just over four in ten (44 per cent) say the country's environmental standards underlie Canada's reputation. Only one in eight (13 per cent) believe that Canadian products have a reputation for low prices.

Roughly two-thirds of Canadians (64 per cent) say country of origin is a major factor in their decision to purchase a particular product, while one in five (19 per cent) say it affects their decision to a moderate extent. Just one in seven (15 per cent) feel they are not influenced by a product's country of origin.

Trade Opportunities

Results suggest respondents are only moderately worried about the impact of trade on international environmental standards. Just half (51 per cent) are of the view that increased international trade is likely to result in countries lowering their environmental standards to be more competitive, while one-quarter (25 per cent) disagree. Tracking reveals a steady decrease in agreement with this statement over the past 20 years (51 per cent, down from 62 per cent in 1999).

Results also suggest that international trade is widely seen as an opportunity for Canada to promote a number of social goals. About two-thirds of Canadians see trade as a good way to promote environmental responsibility (65 per cent) and respect for labour rights (64 per cent). More

than six in ten say trade is an effective means to foster respect for human rights (62 per cent) and trade opportunities for all (60 per cent).

Knowledge of Trade and Canada's Free Trade Agreements

When asked whether more free trade is a good thing or a bad thing for Canada, six in ten respondents (61 per cent) say it is a good thing, while only one in ten (ten per cent) think it is a bad thing. Tracking reveals a 13-point increase in support for free trade over the last three years.

When asked, unprompted, which countries they believe Canada should be trying to tie itself to more in terms of trade, one-quarter of respondents (24 per cent) believe Canada should tie itself more to Europe, and slightly fewer (22 per cent) say the United States. About one in six believe Canada should increase trade with China and the United Kingdom (16 per cent each), and slightly fewer (12 per cent) say India.

Respondents were asked, unprompted, what impact the Canada-United States-Mexico Agreement (CUSMA) will have on Canadians. Responses vary and do not centre on any one theme, suggesting limited understanding of the agreement. One in seven (15 per cent) say there will be no significant impacts, while one in ten (ten per cent) believe the economy (in general) will benefit. Just under one in ten foresee negative impacts on the agricultural sector, more dependence on the U.S., or unspecified positive impacts (seven per cent each). A significant proportion of respondents – 30 per cent – did not provide a response, again suggesting a lack of understanding of the agreement.

Canadians were also asked for their awareness and views on two recently signed trade agreements: the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), and the Comprehensive Economic and Trade Agreement (CETA). Results reveal a general lack of familiarity with both agreements, but those who are familiar express positive views about the agreements.

When asked to rate how familiar they are with the CPTPP, most respondents indicate they are either not very (40 per cent) or not at all (30 per cent) familiar with it. Just one-quarter (26 per cent) say they are somewhat familiar with the agreement, and an even smaller proportion (two per cent) say they are very familiar with it. Despite limited awareness of the CPTPP, those who are familiar with the agreement express favourable views: over half (51 per cent) believe it has had a somewhat positive impact on Canada, and one in five (22 per cent) believe it has a very positive impact.

Results reveal that awareness of CETA is also fairly limited. Most respondents are either not very familiar (39 per cent) or not at all familiar (28 per cent) with this agreement. About one-quarter (28 per cent) say they are somewhat familiar with the agreement, and just four per cent are very familiar with it. As with CPTTP, despite low awareness, those familiar with the agreement express very favourable views about it: over half (54 per cent) of those who express familiarity with the agreement say CETA's impact on Canada has been somewhat positive, and three in ten (30 per cent) say its impacts have been very positive. Just one in ten of these respondents (11 per cent) say the impacts have been negative.

Direct Impact on Canadians

Consistent with other findings, results reveal positive impressions of the impacts of international trade, both within Canada and abroad. Significantly, fully three-quarters (75 per cent) believe Canada's international trade has had a positive impact on the development of Canadian technology and innovation, and six in ten (60 per cent) say it has had a positive impact on the number of jobs in Canada. Just over half (54 per cent) say Canadians' quality of life has improved as a result of international trade, while just under half (46 per cent) feel environmental standards in Canada and abroad have improved because of trade. A further four in ten (40 per cent) believe Canada's international trade has had a positive impact on improving working conditions abroad.

Results also reveal Canadians believe that international trade personally benefits them. When asked whether they feel they currently benefit from international trade, about six in ten (63 per cent) say yes, while only one-quarter (26 per cent) say no. Among those who feel they are benefitting from trade, eight in ten (81 per cent) say they enjoy a broader selection of goods and services, while more than half cite job creation (58 per cent), economic benefits (56 per cent), and lower prices (51 per cent) as personal benefits from international trade. Among those who do not feel they have benefited from international trade, roughly four in ten cite the inferior quality of foreign-made products (41 per cent), comparatively higher prices for imported products (39 per cent), environmental concerns (37 per cent), and fears of job losses within Canada (36 per cent).¹

Most Canadians (61 per cent) say they are familiar with programs offered by the federal government intended to help companies do business abroad. When asked to elaborate on their response, however, the majority of these respondents (61 per cent) were unable to name a specific

¹ It should be noted that these questions were asked toward the end of the survey. Earlier questions – particularly those that deal with the perceived impact of international trade on the prices and variety of consumer goods – may have impacted responses.

program. Among those able to provide a response, Export Development Canada (12 per cent) and the Business Development Bank of Canada (eight per cent) were mentioned most often.

Conclusions and Implications

Canadians hold generally positive views of international trade. On most of the indicators tested, respondents see trade as beneficial to Canada, particularly when it comes to fostering innovation and stimulating job growth. Indeed, fully three-quarters (75 per cent) believe Canada's international trade has had a positive impact on the development of Canadian technology and innovation. Furthermore, the vast majority of Canadians believe that trade has become more important in recent years, and are open to further expanding trade. Most Canadians feel they personally benefit from trade, with the perceived benefits centred on improved choice, lower prices, and better job opportunities.

One potential problem area, however, is the perception that the benefits of international trade are enjoyed to a much greater degree by large corporations and the rich. Canadians are divided on whether the benefits from international trade are filtering down through the economy, and respondents express serious doubts as to whether Canada's more marginalized communities – particularly Indigenous and LGBTQ2 Canadians – are benefitting from trade. Nevertheless, most Canadians see trade as an avenue to promote trade opportunities for these groups, as well as other social goals.

When it comes to considering Canada's approach to trade, respondents put forward a number of important considerations, particularly economic issues such job creation, support for Canadian businesses, and innovation. However, protections for health and environmental standards, protecting intellectual property, ensuring a more equitable division of the benefits of trade, and diversifying Canada's markets are also top-tier priorities.

Given the level of media attention to renegotiating NAFTA, it is not surprising that recall of news related to international trade is up from 2001, with the bulk of the subject matter pertaining to CUSMA. Familiarity with Canada's other recently signed trade agreements – CETA, and CPTPP – is relatively low, however, among those who are familiar with the agreements, clear majorities are optimistic about their impacts.

Implications

Perhaps the most interesting finding is that Canadians remain unified and bullish about international trade. There is remarkable stability in positive attitudes to trade and globalization. If anything, these attitudes have improved somewhat in recent years. If protectionism and anti-

globalization are currently sweeping parts of the Western world, they do not seem to have found much traction in Canada; there is no evidence that enthusiasm for international trade is diminishing.

Canadians like international trade mainly because of the economic benefits it brings. They also recognize other benefits, and there are a number of goals that they would like to see linked to trade, such as the environment, labour, and women's issues. However, these objectives are ultimately subordinate to economic issues.

Perceptions of trade are dominated by CUSMA. Canadians are widely supportive of CUSMA and while they do not seem to believe the agreement will bring many benefits beyond those provided by NAFTA, they do not see any obvious downsides to the agreement. In other words, Canadians seem pleased with how the deal was negotiated.

Fluency on international trade is mixed. Canadians recognize the role of the United States, but seem to overestimate the demand for Canadian exports in China relative to markets such as Europe and the United Kingdom.

Canadians see trade as primarily benefitting big business (indeed, when respondents were asked about the benefits of trade, there was a huge drop-off when the scope of the question shifted to small businesses). Interestingly, Canadians do not appear too bothered by this apparent lack of equity; they seem to acknowledge that economic growth in this country is inextricably linked to the performance of our larger companies, although they do express some concerns that the benefits of international trade are not being shared by all Canadians.

1. Background and Methodology

1.1 BACKGROUND AND OBJECTIVES

In alignment with the Trade Diversification Strategy, Global Affairs Canada (GAC) is pursuing efforts to help Canada diversify its trade abroad. This strategy includes efforts to advance an inclusive approach to trade that seeks to ensure that the benefits and opportunities from trade are more widely shared among all Canadians.

While Global Affairs Canada has conducted public opinion research (POR) with key stakeholders in the past, these studies were primarily done to inform program delivery to small and medium sized enterprises. Only a series of small, intermittent studies have been undertaken with the general population.

A baseline survey was conducted to provide trade communicators with a clear view of Canadians' understanding and attitudes toward trade, to help inform messaging and communications (including products such as speeches, interview briefs, news releases, and social media).

The research objectives were as follows:

- To determine Canadians' level of understanding and interest of general trade issues;
- To determine the level of understanding of the benefits of trade, including foreign direct investment;
- To determine Canadians' views on trade with various countries and sectors;
- To determine the level of understanding of inclusive trade elements (women, indigenous, LGBTQ2) and sustainable development (labour, environmental protections);
- To determine Canadians' awareness of Canada's free trade agreements;
- To determine Canadians' awareness of government programs, services and agencies; and
- To determine how Canadians feel directly impacted by international trade.

1.2 METHODOLOGY

This research involved a survey of 2,089 Canadians 18 years of age and older. Fieldwork took place from February 6 to February 19, 2020. The survey was conducted primarily online using our probability-based online panel, *Probit*. However, to help with coverage of Canadians

who do not have internet access, some interviews were conducted by telephone. In total, 1,588 cases were collected online and 501 were collected by telephone. Survey results were weighted based on Statistics Canada data according to age, gender, and region to ensure the sample is representative of the Canadian general public aged 18 years and over. The margin of error associated with the total sample is +/-2.1 percentage points, 19 times out of 20.

Below we provide more detail on the methodology associated with both the online and telephone components of the research.

Probit Panel (Online Sample)

We used our probability-based online panel, *Probit*, for the online completions. *Probit* is an online research panel that has been designed by EKOS to provide statistically representative data. Our panel offers complete coverage of the Canadian population (Internet, phone, cell phone), random recruitment (participants are recruited randomly, they do not opt themselves into our panel), and equal probability sampling. All respondents to our panel are recruited by telephone using random digit dialling, and their demographic information is confirmed by live interviewers.

The distribution of the recruitment process for our panel mirrors the actual population in Canada (as defined by Statistics Canada). As such, our panel can be considered representative of the general public (survey results from our online panel support confidence intervals and margin of error estimates, which is unique in Canada). The overall panel size is roughly 90,000 Canadian households. Random stratified samples are drawn from the panel database for individual research assignments.

Telephone Sample

EKOS relies on Survey Sample for the sample requirements of our telephone surveys. The software uses the most up-to-date directories as they become available and is updated quarterly. It samples by Random Digit Dial (RDD) methodology and checks its samples against published phone lists to divide the sample into "Directory Listed" (DL) and "Directory Not Listed" (DNL) RDD components. The flexibility of this software allows one to sample within specific regions or cities. One can sample according to population representativeness or stipulate stratification parameters, as required. Once the sample is determined for a specific survey, the numbers are imported into our Computer Assisted Telephone Interview (CATI) system and quotas are set for individual characteristics.

We completed 501 telephone interviews, and 1,588 cases were collected online. Results were weighted by region, gender, and age to ensure that the sample is representative of the Canadian population 18 years of age and older. Outlined below is the sample breakdown and margin of error (MOE) across province/territory, age, gender, income, educational attainment, and minority group.

Margin of Error by Province/Territory		
Province/Territory	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
British Columbia	n=261	6.1%
Alberta	n=237	6.4%
Saskatchewan	n=61	12.7%
Manitoba	n=71	11.7%
Ontario	n=829	3.4%
Quebec	n=480	4.5%
New Brunswick	n=39	15.9%
Nova Scotia	n=57	13.1%
Prince Edward Island	n=12	29.5%
Newfoundland	n=26	19.6%
Territories	n=8	37.0%

Margin of Error by Age		
Age	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
18-34 years	n=409	4.9%
35-49 years	n=573	4.1%
50-64 years	n=586	4.1%
65 years or older	n=493	4.4%

Margin of Error by Gender		
Gender	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
Male	n=1003	3.1%
Female	n=1057	3.0%
Other	n=10	32.7%

Margin of Error by Income		
Income	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
Under \$20,000	n=95	10.1%
Between \$20,000 and \$39,999	n=221	6.6%
Between \$40,000 and \$59,999	n=284	5.8%
Between \$60,000 and \$79,999	n=251	6.2%
Between \$80,000 and \$99,999	n=264	6.0%
Between \$100,000 and \$149,999	n=381	5.0%
\$150,000 or above	n=308	5.6%

Margin of Error by Educational Attainment		
Educational attainment	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
Grade 8 or less	n=8	37.0%
Some high school	n=54	13.5%
High School diploma or equivalent	n=328	5.4%
Registered Apprenticeship or other trades certificate or diploma	n=100	9.8%
College, CEGEP or other non-university certificate or diploma	n=452	4.6%
University certificate or diploma below Bachelor's level	n=176	7.4%
Bachelor's degree	n=566	4.1%
Post graduate degree above bachelor's level	n=382	5.0%

Margin of Error by Minority Group		
Minority group	Sample size	Margin of error (+/-, 19 times out of 20)
Overall	n=2,089	2.1%
A person with a disability	n=214	6.7%
A member of a visible minority group	n=164	7.7%
An Indigenous person	n=46	14.6%
A member of the LGBTQ2 community	n=133	8.5%
None of the above	n=1521	2.5%

Response Rate

The telephone response rate for this survey was 7.1 per cent. The response rate is calculated by dividing the in-scope responding (713) by the total (functional) sample (9,987) – see table below.

	Total Numbers Attempted	14,215
	Invalid numbers	4,228
	Blocked	91
	Business	183
	Duplicate	3
	Invalid	3,951
U	Unresolved	6,031
	No answer	
	Callbacks	6,031
IS	In-scope – Not responding	3,243
	Household refusal	
	Respondent refusal	3,243
	Selected respondent not available	
	Qualified respondent break-off	
R	In-scope – Responding	713
	Language problem	130
	Quota filled	39
	Other disqualify	16
	Completed interviews	528
	Total (U + IS + R)	9,987
	RESPONSE RATE (R divided by Total)	7.1%

The online response rate for this survey was 24.8 per cent. The online response rate is calculated as follows: a total of 6,329 email invitations were sent out, and 23 bounced back, for a total of 6,306 valid emails. A total of 1,561 cases were completed, so dividing 1,561 by 6,306 results in a response rate of 24.8 per cent.

2. General Trade Issues

2.1 RECALL OF NEWS RELATED TO INTERNATIONAL TRADE

Results suggest that international trade is a popular topic in the media. When asked if they could recall hearing any news about international trade, fully three-quarters of respondents (75 per cent) indicated yes, while one in five (20 per cent) said no. Tracking from 2001 reveals an 11-point increase in recall of news related to international trade.

- Men are more likely to remember hearing news pertaining to international trade (81 per cent, compared to 70 per cent of women).
- Recall rises progressively with both age (84 per cent among those ages 65 and over, compared to 70 per cent of those under 35) and educational attainment (82 per cent among university graduates, compared to 63 per cent among high school educated).
- Regionally, recall is highest in British Columbia (86 per cent) and lowest in Quebec (61 per cent).

Among those who remember hearing about international trade in the news, nearly half (46 per cent) specifically recall news related to the Canada-United States-Mexico Agreement (CUSMA). Other common responses include news about China (eight per cent) and news pertaining to relations between China and the United States (six per cent).

Recall of news related to international trade

Q. Do you recall any news in recent months on issues related to international trade?

February 2020



BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

April 2001



BASE: Canadians; March 28 to April 6, 2001, n=1,204, MOE +/- 2.8%, 19 times out of 20

☐ DK/NR

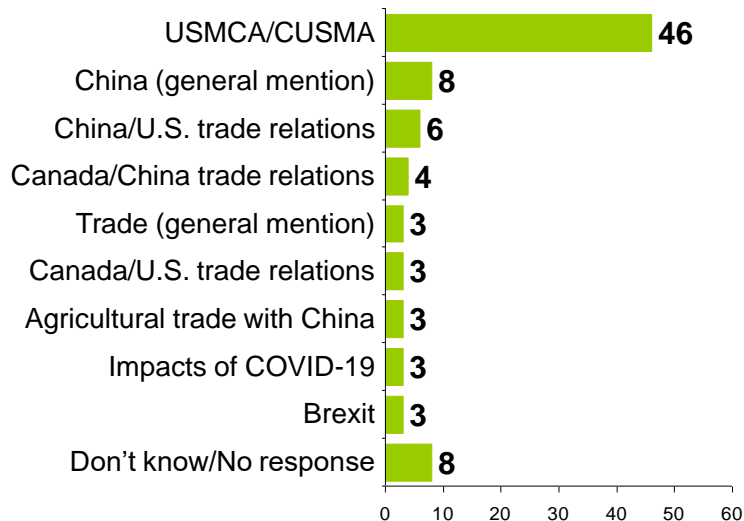
☒ No

☒ Yes

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Subject of news recalled

Q. [IF YES] If yes, what was the topic of the report? [OPEN]



Note: Only those responses selected by at least 3% displayed above

Copyright 2020
No reproduction without permission **BASE:** Heard news related to trade; February 6-19, 2020, n=1,591, MOE +/- 2.5%, 19 times out of 20

2.2 IMPORTANCE OF KEY INTERNATIONAL TRADE GOALS

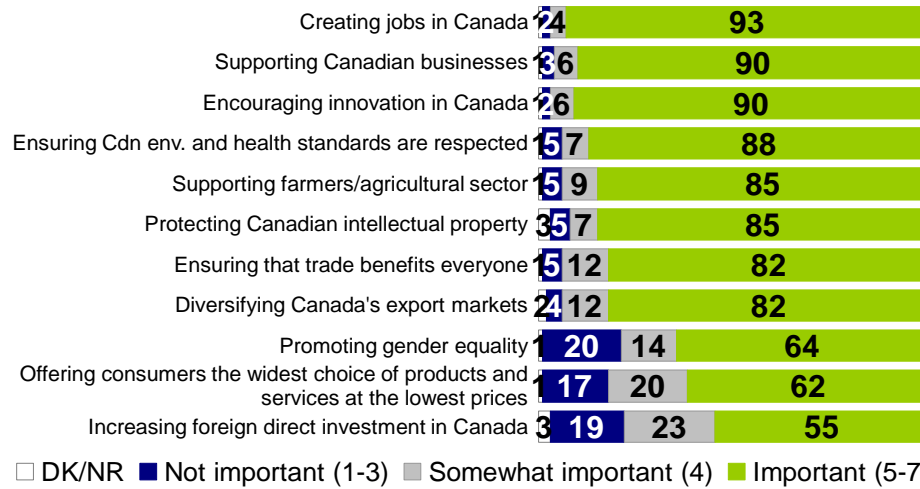
Respondents were presented a list of potential goals for Canada's approach to international trade and asked to rate the importance of each once. Economic issues top the list, with nine in ten respondents rating job creation (93 per cent), support for Canadians businesses (90 per cent), and innovation (90 per cent) as key priorities. More than eight in ten also assign a high degree of importance to ensuring that Canada's environmental and health standards are respected (88 per cent), supporting Canada's agricultural sector (85 per cent), protecting Canadian intellectual property (85 per cent), ensuring that everyone benefits from trade (82 per cent), and diversifying Canada's export markets (82 per cent).

Canadians attach comparatively less importance to promoting gender equality (64 per cent), offering consumers the widest possible choice of products and services at the lowest prices (62 per cent), and increasing foreign direct investment in Canada (55 per cent).

- Women are more likely to place importance on supporting farmers (90 per cent, compared to 80 per cent of men), enforcing environmental standards (92 per cent versus 83 per cent), and ensuring gender equality (73 per cent versus 56 per cent).
- Seniors (i.e., those 65 and over) place more importance on promoting gender equality (72 per cent, compared to 64 per cent on average), and increasing foreign direct investment (65 per cent versus 55 per cent). The perceived importance of ensuring Canada's trade policies benefit everyone rises progressively with age (from 77 per cent among those under 35 to 88 per cent among those 65 and over), as does emphasis on diversifying Canada's export markets (from 73 per cent to 91 per cent).
- Propensity to prioritize lowering prices and broadening consumer choice declines with educational attainment (from 71 per cent among high school graduates to 57 per cent among those who have completed university).
- Regionally, residents of Quebec are more concerned with promoting gender equality (75 per cent rate it as important), while residents of Alberta and the Prairies are comparatively less likely to see this goal as a priority (53 per cent and 50 per cent, respectively).
- Those who identify as visible minorities are more likely to say offering consumers the widest choice at the lowest prices is an important goal (75 per cent, compared to 62 per cent on average).

Importance of key international trade goals

Q. In your opinion, how important are the following goals when considering Canada's approach to international trade?



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

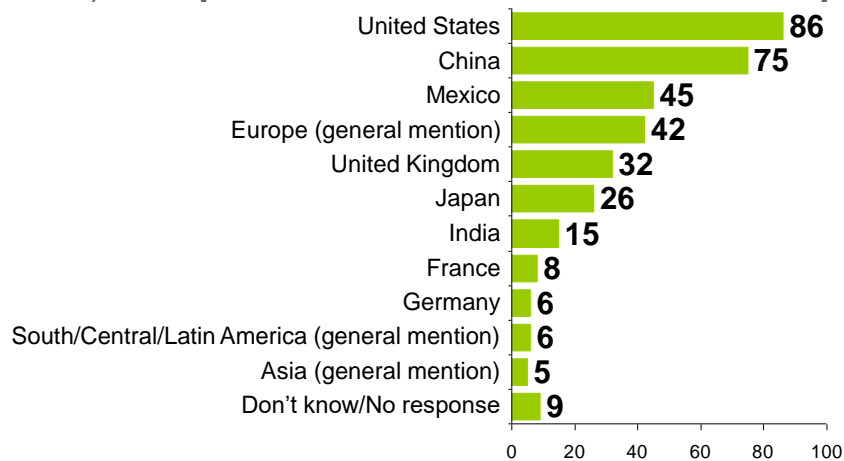
2.3 MOST IMPORTANT MARKETS FOR CANADIAN EXPORTS

Results suggest Canadians are generally familiar with Canada's key trading partners. When asked to identify the five leading markets for Canadian exports, the vast majority of respondents (86 per cent) recognize the United States as Canada's largest export market, while three-quarters (75 per cent) see China as an important market. Just over four in ten cited Mexico (45 per cent) and Europe (42 per cent) as key markets for Canadian exports. One-third (32 per cent) listed the United Kingdom, while one-quarter (26 per cent) mentioned Japan.

- Residents of British Columbia are more likely to see Japan as a key export market (35 per cent, compared to 26 per cent nationally), while residents of Quebec are more likely to identify France (23 per cent versus eight per cent).
- Men, university-educated, and those 65 years and older are most likely to provide five responses to this question.

Most important markets for Canadian exports

Q. Please tell me the top five most important markets/countries for Canadian exports over the last few years? [OPEN/UP TO FIVE RESPONSES ACCEPTED]



Note: Only those responses selected by at least 5% displayed above

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

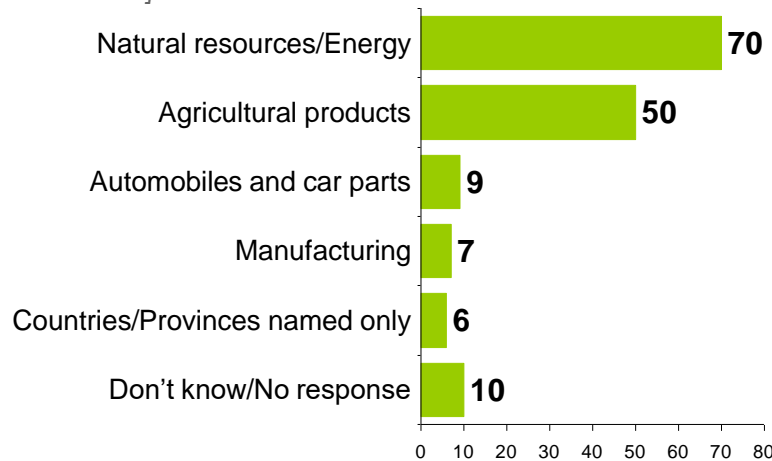
2.4 CANADA'S LARGEST EXPORT SECTORS

Respondents were further asked to identify Canada's two largest export sectors. Responses centre on Canada's resource sectors, with seven in ten listing natural resources/energy (70 per cent), and half (50 per cent) mentioning agricultural products. Other common responses include the automobile industry (nine per cent) and manufacturing (seven per cent).

- Compared to women, men are more likely to mention natural resources and energy (75 per cent, compared to 66 per cent of women).
- The likelihood of identifying Canada's agricultural sector rises with age (from 43 per cent among those under the age 35 to 58 per cent among those ages 65 and over).
- Residents of Saskatchewan and Manitoba are more apt to cite agricultural products (69 per cent, compared to 50 per cent nationally).

Canada's largest export sectors

Q. Which sectors do you think make up the largest part of Canada's exports? [OPEN/UP TO TWO RESPONSES ACCEPTED]



Note: Only those responses selected by at least 5% displayed above

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

3. Benefits of International Trade

3.1 IMPORTANCE OF INTERNATIONAL TRADE

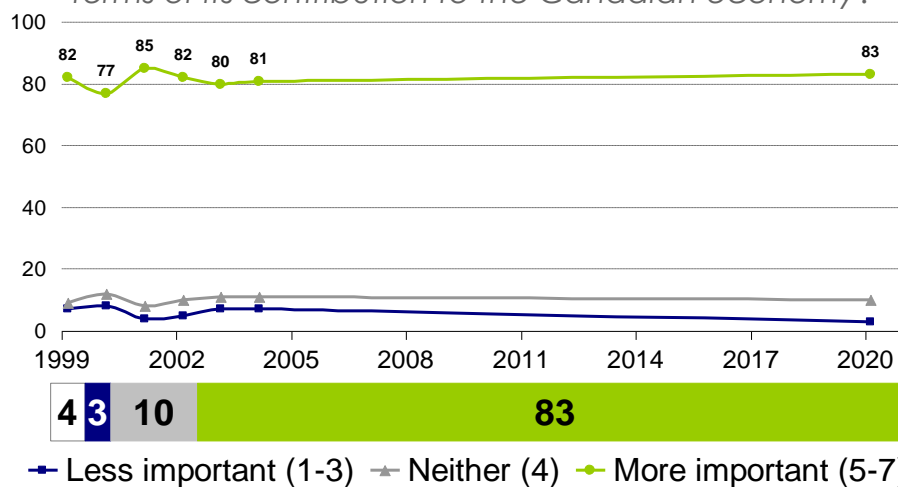
Results suggest Canadians widely feel that trade has become more important over the past ten years. Roughly eight in ten respondents (83 per cent) say trade has grown in importance, while just three per cent believe it is becoming less important. Ten per cent say trade is neither more nor less important than it was a decade ago. Tracking reveals that these results have remained largely stable over the past 20 years.

- The likelihood of saying trade has become more important in recent years rises with age (from 79 per cent among those under 35 to 90 per cent among those ages 65 and over).

Those who believe trade has become more important over the past 10 years were asked, unprompted, to elaborate on their answer. These respondents offered a variety of reasons, including increased globalization (13 per cent), growing interdependence between countries (11 per cent), the economic benefits of trade (eight per cent), the need for more diverse markets (seven per cent), and our economic dependence on trade (seven per cent).

Importance of international trade

Q. Over the past 10 years, do you think international trade has become less important or more important in terms of its contribution to the Canadian economy?

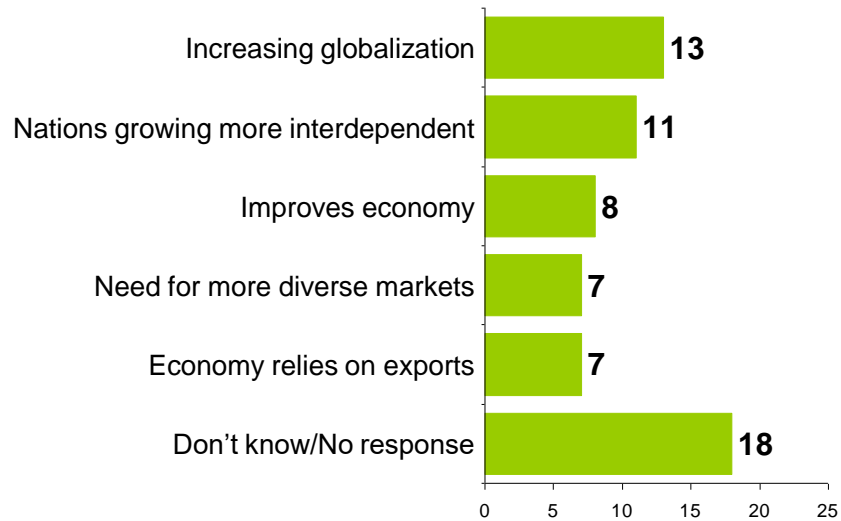


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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Reasons for growing importance of trade

Q. [IF MORE IMPORTANT] Why do you feel this way? [OPEN]



Note: Only those responses selected by at least 7% displayed above

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BASE: Says trade is more important; February 6-19, 2020, n=1,742, MOE +/- 2.4%, 19 times out of 20

3.2 PERCEIVED BENEFICIARIES OF TRADE

Results reveal that Canadians are divided on who primarily benefits from international trade. Just over half of respondents (54 per cent) believe that trade benefits most Canadians in the form of jobs, tax revenue, and a better selection of good and services. Four in ten (42 per cent), however, hold the more negative view that the benefits of international trade are enjoyed almost exclusively by large corporations and wealthy investors. These findings are unchanged from 2001.

- The perspective that trade benefits Canadians at all levels of society becomes more common with age (45 per cent among those under the age of 35, compared to 67 per cent among those ages 65 and over). Conversely, the likelihood of holding the view that trade serves mainly the interests of the wealthy diminishes with age (from 51 per cent among those under 35 to 31 per cent among those 65 and over).
- Regionally, Alberta residents are more apt to say trade brings far-reaching benefits (65 per cent, compared to 54 per cent on average), while Quebecers are comparatively more likely to say these benefits are concentrated among those at the top (52 per cent versus 42 per cent).
- Those who identify as LGBTQ2 are more likely to say trade disproportionately benefits those at the top of Canada's socioeconomic ladder (62 per cent, compared to 42 per cent on average).

Perceived beneficiaries of trade

Q. Which of the following two statements is closest to your point of view?

February 2020



BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

April 2001



BASE: Canadians; March 28 to April 6, 2001, n=1,204, MOE +/- 2.8%, 19 times out of 20

☐ DK/NR

- The benefits from international trade go mostly to large corporations and wealthy investors, with little left over for average Canadians
- The benefits from international trade filter down through the economy and most Canadians benefit through jobs, taxes companies pay, and a better selection of goods available to consumers

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3.3 IMPACTS OF INTERNATIONAL TRADE

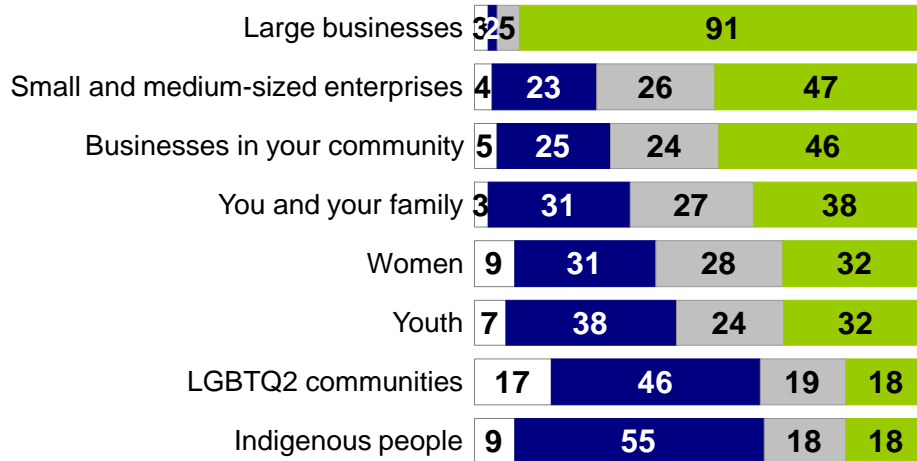
Results further suggest Canadians feel that trade overwhelmingly benefits large corporations, but offers far fewer benefits to Canada's more marginalized communities. When asked to rate the extent to which various groups benefit from international trade, nine in ten respondents (91 per cent) say large businesses benefit to a great extent. Just under half feel that small- to medium-sized enterprises and community businesses benefit to the same extent (47 per cent and 46 per cent, respectively). Four in ten (38 per cent) feel they personally benefit from international trade, and only one-third believe women or youth have benefited from international trade (32 per cent each). Very few feel LGBTQ2 communities or Indigenous people have benefitted from trade (18 per cent each).

Tracking reveals a six-point increase since 2004 in the proportion of Canadians who believe large businesses enjoy considerable benefits from international trade.

- Men are consistently more likely to say that all groups benefit from international trade. For example, 52 per cent say community businesses enjoy substantial benefits from trade, compared to 42 per cent of women.
- Residents of Alberta are more likely to say that international trade contributes to the well-being of local businesses (56 per cent versus 46 per cent on average), average Canadians (51 per cent versus 38 per cent), and Indigenous people (29 per cent versus 18 per cent).

Impacts of international trade

Q. To what extent would you say that international trade benefits each of the following within Canada?



□ DK/NR ■ Little extent (1-3) ■ Moderate extent (4) ■ Great extent (5-7)

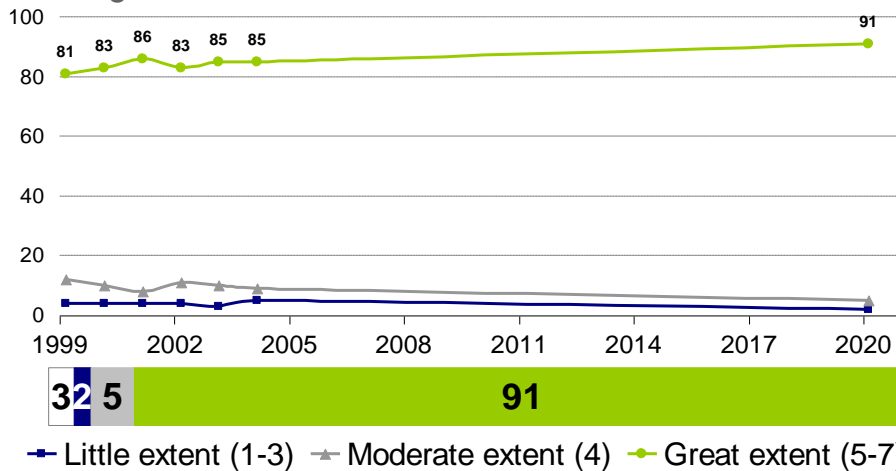
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: Large businesses

Q. To what extent would you say that international trade benefits each of the following within Canada?

Large businesses



■ Little extent (1-3) ■ Moderate extent (4) ■ Great extent (5-7)

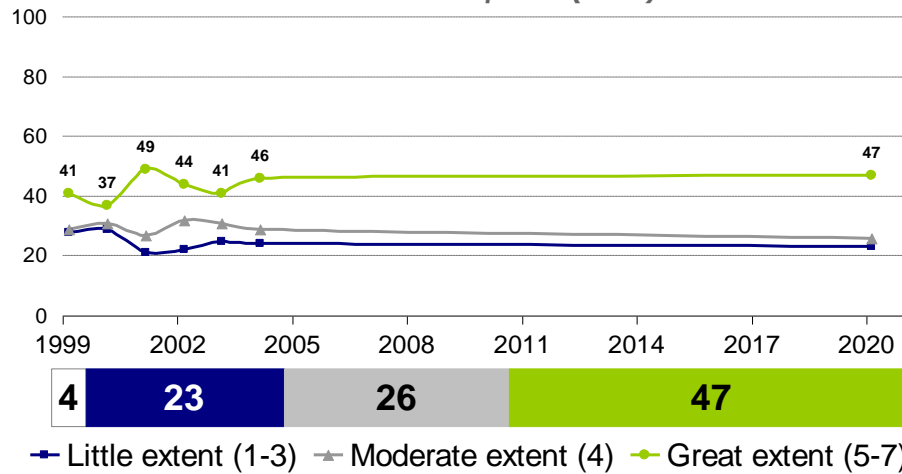
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: SMEs

Q. To what extent would you say that international trade benefits each of the following within Canada?

Small and medium-sized enterprises (SMEs)



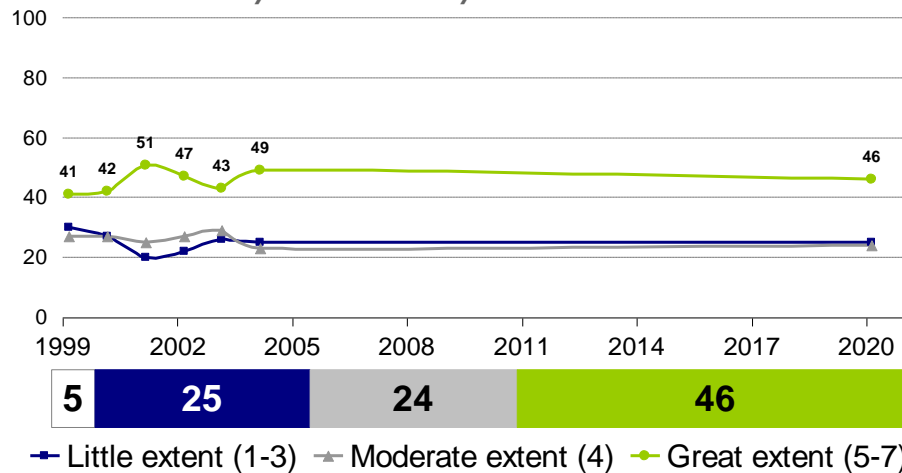
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: Local businesses

Q. To what extent would you say that international trade benefits each of the following within Canada?

Businesses in your community



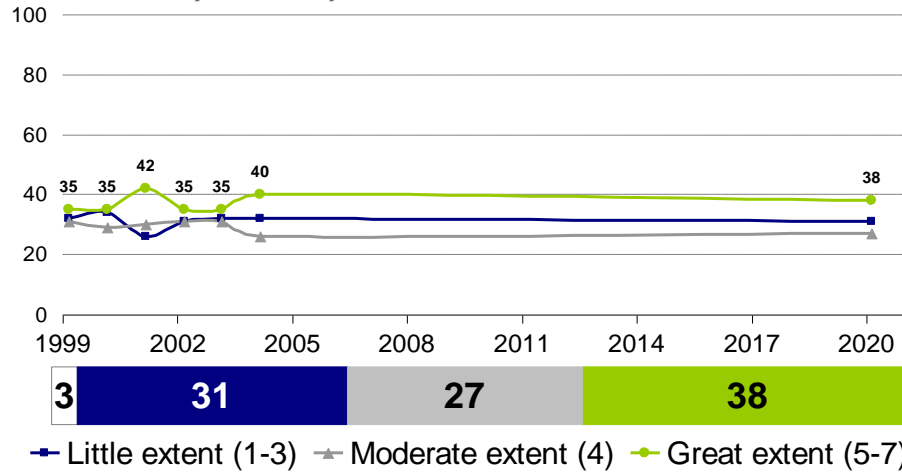
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: Individual Canadians

Q. To what extent would you say that international trade benefits each of the following within Canada?

You and your family



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

3.4 IMPACTS OF INTERNATIONAL INVESTMENTS

Respondents were asked about the perceived benefits of Canadian investments in other countries and about the impacts of foreign investments in Canada. Over half of respondents (52 per cent) say Canadians benefit significantly from investments abroad, while one-quarter (23 per cent) say the country benefits to a moderate extent. One in five (19 per cent) say Canadians enjoy few – if any – benefits from Canadian businesses investing in other countries.

Foreign investments within Canada elicit even more favourable reactions. Seven in ten (72 per cent) feel the country benefits greatly from these investments, and only ten per cent say the benefits of foreign investments are of little to no consequence.

Impacts of international investments

Canadian investments abroad

Q. *To what extent do you think Canadian businesses investing in other countries benefits Canada?*



Foreign investments in Canada

Q. *Using the same scale to what extent do you think international businesses investing in Canada benefits the Canadian economy?*



□ DK/NR ■ Low extent (1-3) ■ Moderate extent (4) ■ Great extent (5-7)

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

4. Canada's Brand

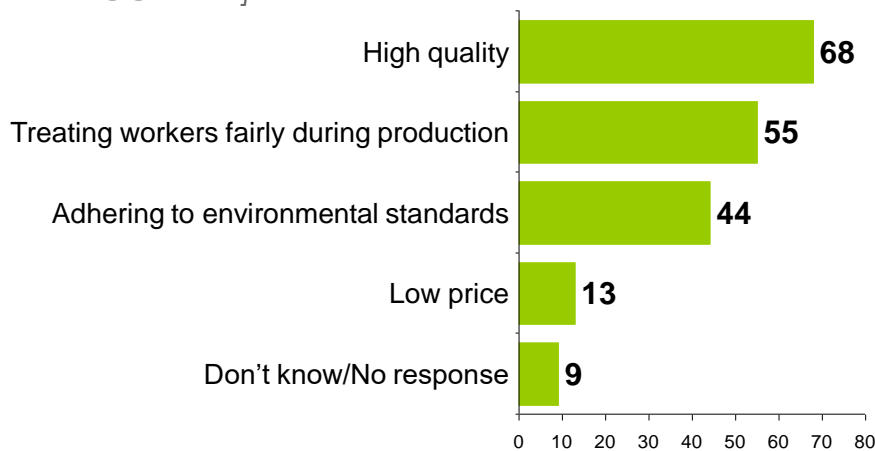
4.1 REPUTATION OF CANADIAN PRODUCTS

Respondents were asked to identify the qualities for which they feel Canadian products are best known internationally. Two-thirds (68 per cent) say they are best known for their high quality. Just over half (55 per cent) say Canadian goods are defined by Canada's fair labour practices, while just over four in ten (44 per cent) say the country's environmental standards underlie Canada's reputation. Only one in eight (13 per cent) believe that Canadian products have a reputation for low prices. Nine per cent offered no response.

- The likelihood of citing the comparatively higher quality of Canadian products rises with age (from 62 per cent among those under the age of 35 to 77 per cent among those ages 65 and over).
- The perception that Canadian products are best known for the strict environmental standards to which they adhere is more prevalent in Alberta (57 per cent, compared to 44 per cent nationally).

Reputation of Canadian products

Q. *In your opinion, what are Canadian products best known for internationally? [MULTIPLE RESPONSES ACCEPTED]*



Note: Only those responses selected by at least 5% displayed above

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

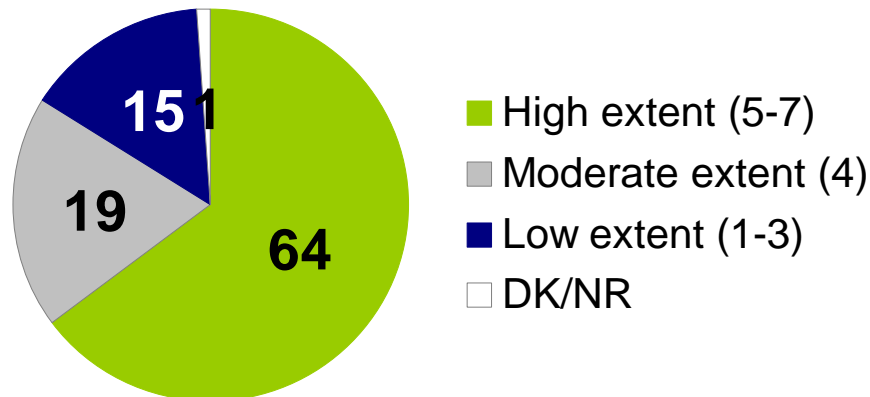
4.2 WEIGHT OF COUNTRY OF ORIGIN IN PURCHASING DECISIONS

Results suggest the country in which a product is produced is a major factor in consumer purchasing decisions. Roughly two-thirds of Canadians (64 per cent) say country of origin is a major factor in their decision to purchase a particular product, while one in five (19 per cent) say it affects their decision to a moderate extent. Just one in seven (15 per cent) say they are not influenced by a product's country of origin.

- The importance of country of origin on purchasing decisions rises progressively with age (55 per cent of those under the age of 35 say it is a major factor, compared to 72 per cent among those ages 65 and over).

Weight of country of origin in purchasing decisions

Q. *To what extent does the origin of the country which produces or manufactures a product affect your decision to purchase the product?*



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

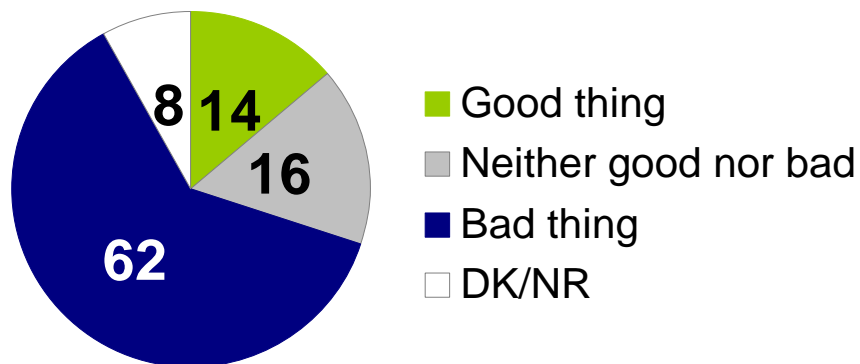
4.3 VIEWS ON PROTECTIONISM

Respondents were presented with a brief description of protectionism and asked whether they considered growing protectionist sentiments to be a good thing or a bad thing for Canada. Results reveal that most Canadians (62 per cent) feel protectionism is a bad thing. Just one in seven (14 per cent) believe protectionism to be a good thing, and roughly the same proportion (16 per cent) hold neither a positive nor negative view on the matter.

- The perspective that the rise protectionism is a bad thing is relatively more common among those ages 65 and over (71 per cent, compared to 62 per cent on average) and men (66 per cent, compared to 57 per cent of women).
- Disapproval of growing protectionist sentiments rises with educational attainment (from 50 per cent among high school graduates to 68 per cent among the university educated).

Views on protectionism

Q. *Many people talk about the rise of protectionism in the United States and Europe which, among other things, includes growing opposition to trade and globalization. Overall, do you think this rise of protectionism is a good thing or a bad thing for Canada?*



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

5. Trade Opportunities

5.1 IMPACT OF TRADE ON ENVIRONMENTAL STANDARDS

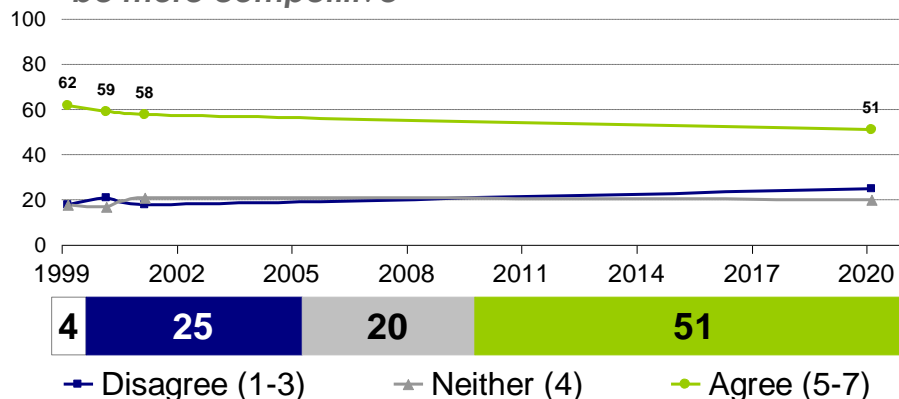
Results suggest respondents are only moderately worried about the impact of trade on international environmental standards. When asked whether they agree or disagree that increased international trade is likely to result in countries lowering their environmental standards to be more competitive, only half (51 per cent) agree this is the case, while one-quarter (25 per cent) disagree. Tracking reveals a steady decrease in agreement with this statement over the past 20 years (51 per cent, down from 62 per cent in 1999).

- Respondents who identify as LGBTQ2 are significantly more likely to worry about the likelihood of increased international trade resulting in countries lowering their environmental standards to be more competitive (68 per cent, compared to 51 per cent on average).

Impact of trade on environmental standards

Q. Please tell me the extent to which you agree or disagree with each of the following statement:

I worry increased international trade is likely to result in countries lowering their environmental standards to be more competitive



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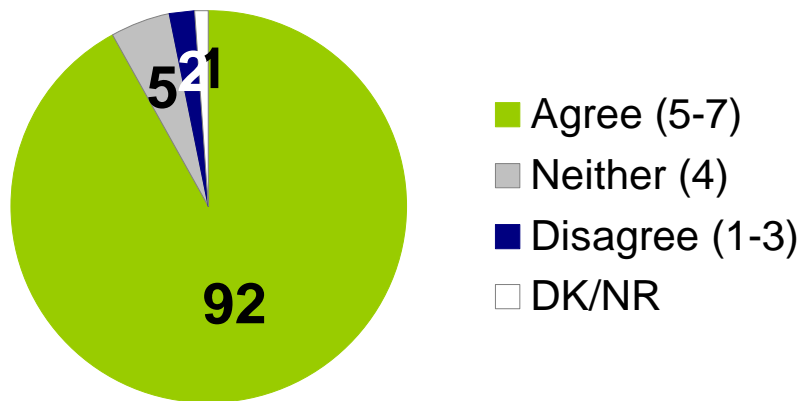
5.2 IMPORTANCE OF CANADIAN INTERESTS

Not surprisingly, respondents feel Canada should protect its own interests in matters of international trade. When asked whether they agree or disagree that Canada should consider the interests of Canadians in its approach to international trade, an overwhelming majority (92 per cent) say we should, while disagreement is virtually non-existent (two per cent).

Importance of Canadian interests

Q. Please tell me the extent to which you agree or disagree with each of the following statement:

Canada should consider the interests of Canadians in its approach to international trade



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5.3 INTERNATIONAL TRADE AND SOCIAL ISSUES

Results suggest that international trade is widely seen as an opportunity for Canada to promote a number of social goals. About two-thirds of Canadians see trade as a good way to promote environmental responsibility (65 per cent) and respect for labour rights (64 per cent). Slightly fewer say trade is an effective means to foster respect for human rights (62 per cent) and trade opportunities for all (60 per cent).

- Women are more likely than men to agree international trade is a good way for Canada to promote respect for labour rights (69 per cent, compared to 59 per cent of men) and human rights (67 per cent versus 57 per cent).
- Respondents who are 65 years of age or older are more likely to see international trade as an avenue for Canada to promote trade opportunities for all (69 per cent, compared to 60 per cent on average).

International trade as a promotional tool

Q. Please tell me the extent to which you agree or disagree with each of the following statements:

International trade is a good way for Canada to promote...



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

6. Knowledge of Trade and Canada's Free Trade Agreements

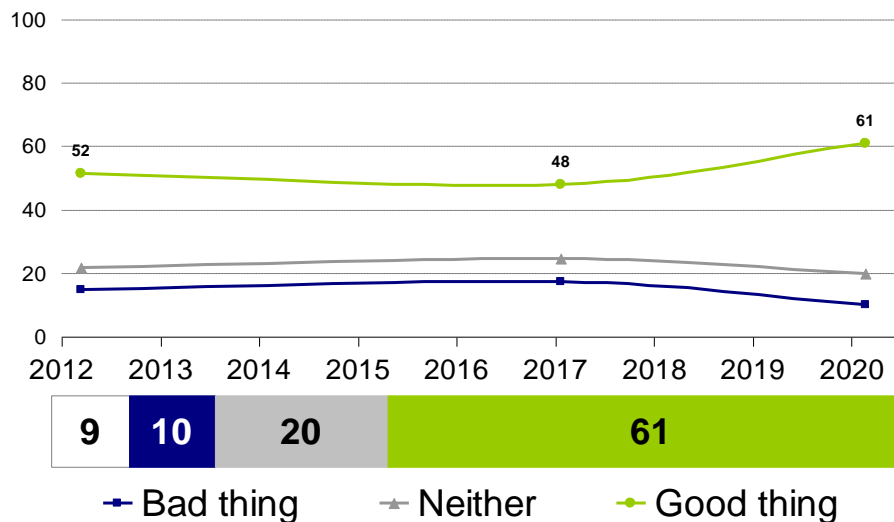
6.1 SUPPORT FOR FREE TRADE

Results suggest Canadians are generally supportive of free trade. When asked whether more free trade is a good thing or a bad thing for Canada, six in ten (61 per cent) say it is a good thing, and only one in ten (ten per cent) think it is a bad thing. Tracking reveals a 13-point increase in support for free trade over the last three years.

- Men are more apt to see free trade as a good thing (69 per cent, compared to 61 per cent on average).
- Residents of Alberta and those ages 65 and over are both more likely to see the benefits of free trade (72 per cent and 71 per cent, respectively, compared to 61 per cent on average).

Support for free trade

Q. Is more free trade a good thing or a bad thing for Canada?



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

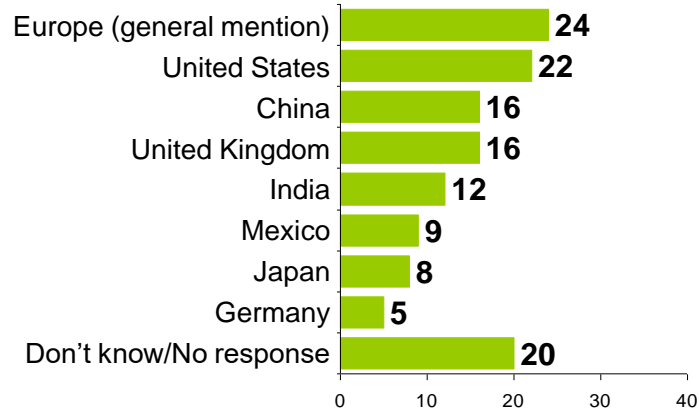
6.2 POTENTIAL FOR MORE TRADE

When asked, unprompted, which countries they believe Canada should be trying to tie itself to more in terms of trade, one-quarter of respondents (24 per cent) believe Canada should tie itself more to Europe, and slightly fewer (22 per cent) say the United States. About one in six believe Canada should increase trade with China and the United Kingdom (16 per cent each), and slightly fewer (12 per cent) say India. Other common responses include Mexico (nine per cent), Japan (eight per cent), and Germany (five per cent).

- Men are much more likely to view China as a trading partner with more potential (21 per cent, compared to 11 per cent of women).
- The likelihood of identifying the United States as a trading partner with more potential diminishes with educational attainment (29 per cent among high school educated, compared to 18 per cent of university graduates). Conversely, a preference for expanding trade with Europe rises with education (from 16 per cent to 27 per cent).
- Residents of Alberta are more likely to say Canada should tie itself more to the United States (31 per cent, compared to 22 per cent nationally).

Potential for more trade

Q. Over the last few decades, Canada has been opening up trade with many countries. Which countries do you believe Canada should be trying to tie itself to more?
[OPEN/UP TO TWO RESPONSES ACCEPTED]



Note: Only those responses selected by at least 5% displayed above

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

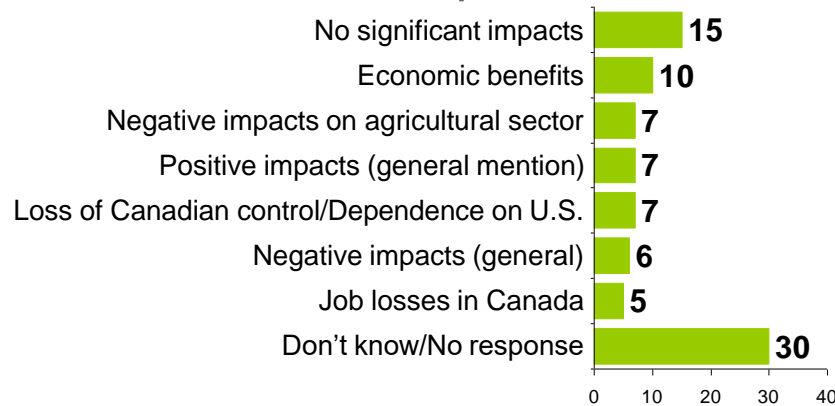
6.3 IMPACTS OF CUSMA

Respondents were asked, unprompted, what impact the Canada-United States-Mexico Agreement (CUSMA) will have on Canadians. Responses vary and do not centre on any one theme, suggesting Canadians have limited understanding of the agreement. One in seven (15 per cent) say there will be no significant impacts, while one in ten (ten per cent) believe the economy (in general) will benefit. Just under one in ten foresee negative impacts on the agricultural sector, more dependence on the U.S., or unspecified positive impacts (seven per cent each). A significant proportion of respondents – 30 per cent – did not provide a response, again suggesting a lack of understanding of the agreement.

- Men are more likely to say CUSMA would have no significant impacts on Canadians (20 per cent, compared to 11 per cent of women).
- The likelihood of saying the new trade agreement will have no appreciable impacts rises with education (from ten per cent among the high school educated to 18 per cent among university graduates).

Impacts of CUSMA

Q. As you may know, Canada, the United States, and Mexico recently signed the Canada-US-Mexico agreement on free trade, which is intended to replace NAFTA. What do you think will be the impact of this new NAFTA on Canadians? [OPEN/UP TO TWO RESPONSES ACCEPTED]



Note: Only those responses selected by at least 5% displayed above

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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

6.4 AWARENESS AND ATTITUDES TO CPTPP AND CETA

Canadians were also asked for their awareness and views on two recently signed trade agreements: the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), and the Comprehensive Economic and Trade Agreement (CETA).

Results reveal a general lack of familiarity with both agreements, but positive views are expressed about the agreements among those familiar with the agreements.

6.4.1 Awareness and attitudes to CPTPP

When asked to rate how familiar they are with the CPTPP, most respondents indicate they are either not very (40 per cent) or not at all (30 per cent) familiar with it. Just one-quarter (26 per cent) say they are somewhat familiar with the agreement, and an even smaller proportion (two per cent) say they are very familiar with it.

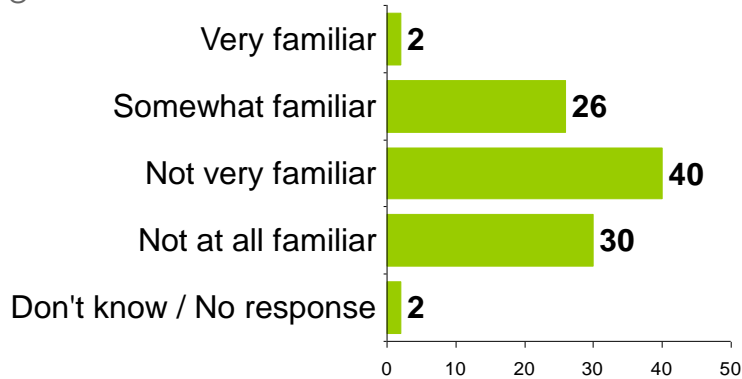
- Self-rated familiarity with the CPTPP is highest among men (40 per cent say they are somewhat or very familiar with the agreement, compared to 19 per cent of women).
- Familiarity with CPTPP increases with respondents' level of education (from 19 per cent among high school educated to 33 per cent among university graduates).
- Residents of Quebec are least likely to be familiar with CPTPP (16 per cent, compared to 28 per cent on average).
- Respondents who were not born in Canada are more likely to say they are familiar with the agreement (37 per cent, compared to 27 per cent among those born in Canada).

Despite limited awareness of the CPTPP, those who are familiar with the agreement express favourable views: over half (51 per cent) believe it has had a somewhat positive impact on Canada, and one in five (22 per cent) believe it has a very positive impact.

- Views of the CPTPP grow more positive with age (from 66 per cent among those under 35 to 87 per cent among those ages 65 and over).

Familiarity with CPTPP

Q. As you may know, Canada recently signed the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), a free trade agreement between Canada and 10 other countries in the Asia-Pacific region. How familiar are you with this agreement?

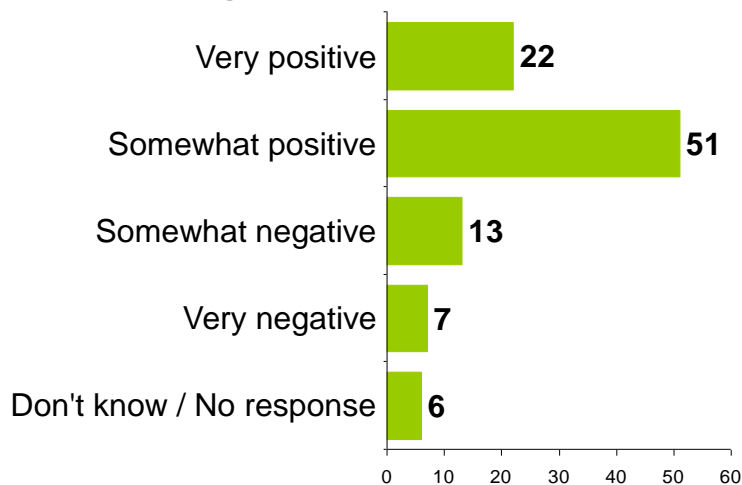


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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Views on CPTPP

Q. [IF VERY/SOMEWHAT FAMILIAR] Based on what you know, would you say the CPTPP's impact on Canada is positive or negative?



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BASE: Familiar with CPTPP; February 6-19, 2020, n=603, MOE +/- 4.0%, 19 times out of 20

6.4.2 Awareness and attitudes to CETA

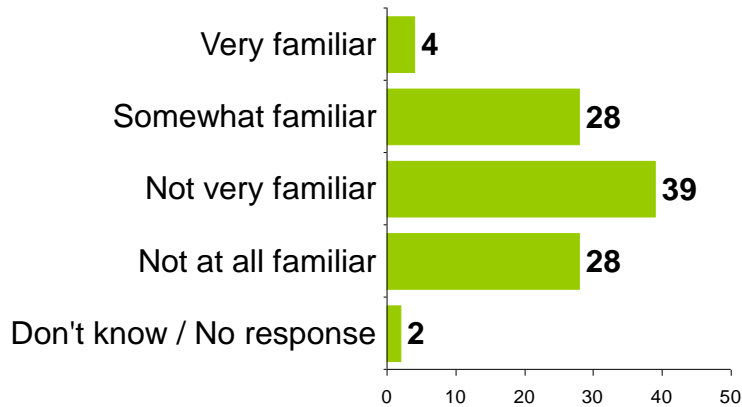
Results reveal that awareness of CETA is also fairly limited. Most respondents are either not very familiar (39 per cent) or not at all familiar (28 per cent) with this agreement. About one-quarter (28 per cent) say they are somewhat familiar with the agreement, and just four per cent are very familiar with it.

- Similar to CPTTP, men are much more likely to say they are familiar with CETA (43 per cent say they are somewhat or very familiar, compared to 21 per cent of women).
- Familiarity with CETA increases with respondents' level of education (from 22 per cent among high school educated to 37 per cent among university graduates).
- Regionally, familiarity with the agreement is lowest in Quebec (22 per cent, compared to 32 per cent nationally).
- Respondents who were not born in Canada are more likely to be familiar with CETA (42 per cent, compared to 31 per cent of Canadian-born respondents).

As with the CPTTP, despite low awareness, those familiar with the agreement express favourable views about it: over half (54 per cent) of those who express familiarity with the agreement say CETA's impact on Canada has been somewhat positive, and three in ten (30 per cent) say its impacts have been very positive. Just one in ten of these respondents (11 per cent) say the impacts have been negative.

Familiarity with CETA

Q. As you may know, Canada recently signed the Comprehensive Economic and Trade Agreement (CETA), a free trade agreement between Canada, the European Union and its members states. How familiar are you with this agreement?

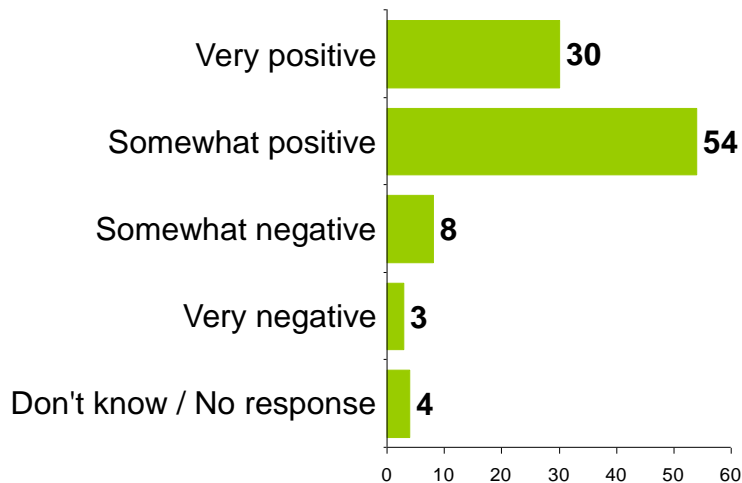


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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Views on CETA

Q. [IF VERY/SOMEWHAT FAMILIAR] Based on what you know, would you say CETA's impact on Canada is positive or negative?



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BASE: Familiar with CETA; February 6-19, 2020, n=676, MOE +/- 3.8%, 19 times out of 20

7. Awareness of Government Programs

7.1 AWARENESS OF GOC PROGRAMS

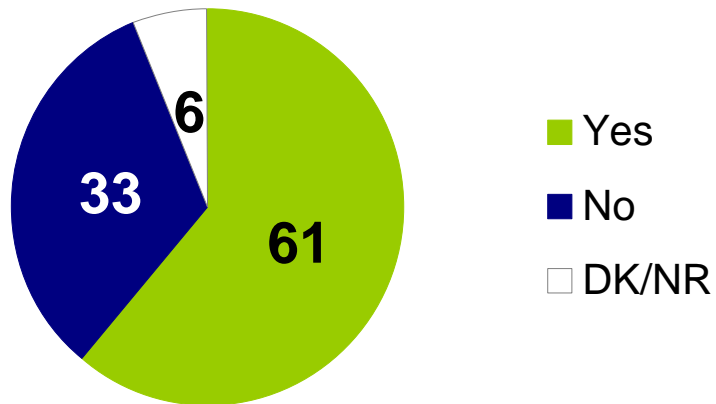
Results reveal that Canadians indicate fairly high levels of familiarity with programs offered by the federal government intended to help companies do business abroad. Fully six in ten respondents (61 per cent) say they are aware of these programs, and one-third (33 per cent) say they are not.

- Men are much more likely than women to say they are aware of these programs (70 per cent, compared to 53 per cent of women).
- Self-rated awareness of these programs rises progressively with age (from 51 per cent among those under 35 to 70 per cent among those ages 65 and over).
- Awareness also tends to increase with educational attainment (from 49 per cent among high school educated to 68 per cent among university graduates).
- Residents of Quebec are somewhat more familiar with these programs (69 per cent, compared to 61 per cent nationally).

When asked to elaborate on their response, however, the majority of respondents (61 per cent) who say they are familiar with these programs were unable to name a specific program. Among those able to provide a response, Export Development Canada (12 per cent) and the Business Development Bank of Canada (eight per cent) were mentioned most often.

Awareness of GoC programs

Q. Are you aware that the Government of Canada has programs available to help companies do business abroad?



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

8. Direct Impact on Canadians

8.1 IMPACTS OF INTERNATIONAL TRADE

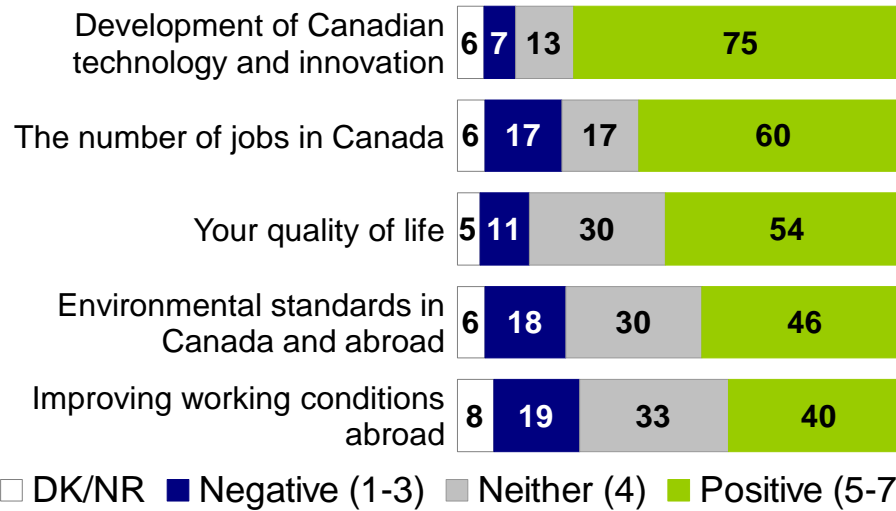
Consistent with other findings, results reveal generally positive impressions of the impacts of international trade. Significantly, fully three-quarters (75 per cent) believe Canada's international trade has had a positive impact on the development of Canadian technology and innovation, and six in ten (60 per cent) say it has had a positive impact on the number of jobs in Canada. Just over half (54 per cent) say Canadians' quality of life has improved as a result of international trade, while just under half (46 per cent) feel the same about environmental standards in Canada and abroad. A further four in ten (40 per cent) believe Canada's international trade has had a positive impact on improving working conditions abroad. Fewer than one in five respondents say international trade has had a negative impact in any of these areas.

Tracking reveals impressions about the impact of international trade on both the development of Canadian technology and innovation and the number of jobs in Canada have remained stable over the past 20 years.

- Men are more likely to say their quality of life has improved as a result of international trade (59 per cent, compared to 49 per cent of women).
- Those ages 65 and over are more apt to say international trade has had a positive impact on the number of jobs in Canada (69 per cent, compared to 60 per cent on average).

Impacts of international trade

Q. What impact do you think Canada's international trade has had on each of the following?



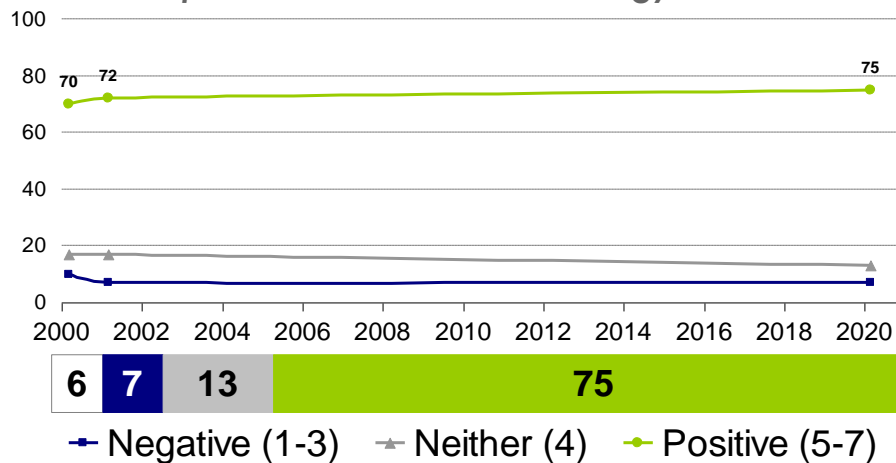
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: Dev. of Canadian technology & innovation

Q. What impact do you think Canada's international trade has had on each of the following?

Development of Canadian technology and innovation



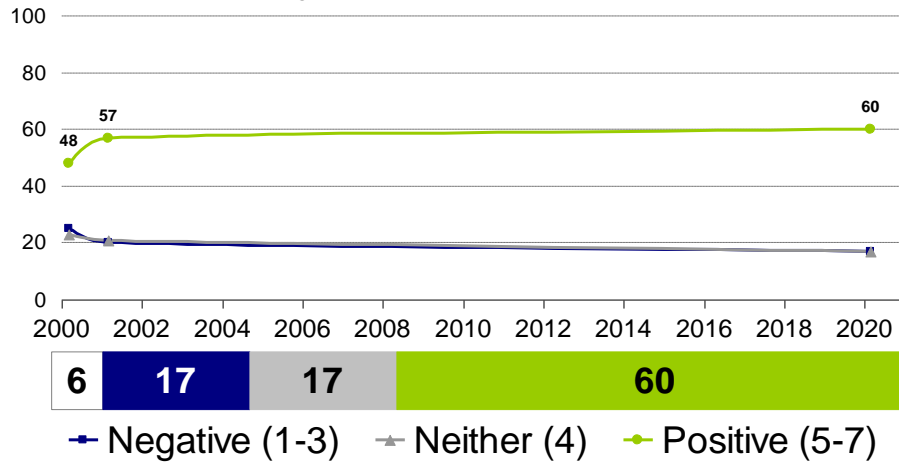
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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Impacts of international trade: The number of jobs in Canada

Q. What impact do you think Canada's international trade has had on each of the following?

The number of jobs in Canada



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

8.2 PERSONAL BENEFITS OF INTERNATIONAL TRADE

Results also reveal Canadians believe that international trade personally benefits them. When asked whether they feel they currently benefit from trade, about six in ten respondents (63 per cent) say yes, while only one-quarter (26 per cent) say no.

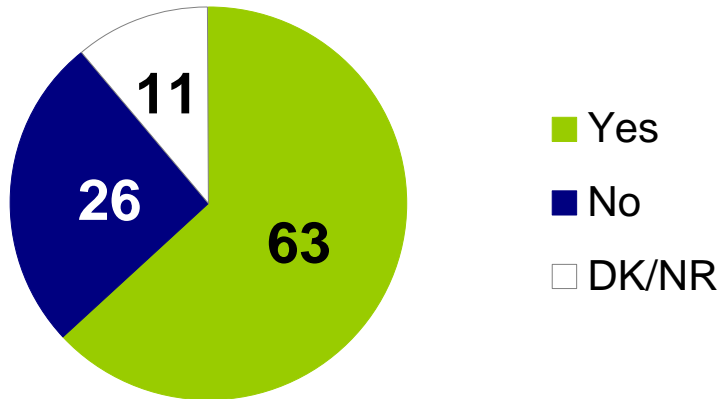
- Belief in the personal benefit of international trade increases with educational attainment; about half of high school educated respondents (53 per cent) say they benefit from trade, a figure that rises to 69 per cent among university graduates.

Among those who feel they are benefitting from trade, eight in ten (81 per cent) say they enjoy a broader selection of goods and services, and more than half cite job creation (58 per cent), economic benefits (56 per cent), and lower prices (51 per cent) as personal benefits from international trade.

Among those who do not feel they have benefited from international trade, roughly four in ten cite the inferior quality of foreign-made products (41 per cent), comparatively higher prices for imported products (39 per cent), environmental concerns (37 per cent), and fears of job losses within Canada (36 per cent). Three in ten (28 per cent) say international trade is bad for the Canadian economy in general.

Personal benefits of international trade

Q. Do you feel that you are currently benefitting from international trade?



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BASE: Canadians; February 6-19, 2020, n=2,089, MOE +/- 2.1%, 19 times out of 20

Reasons for seeing benefits to trade

Q. [IF YES] Why do you think you are benefitting from international trade? [MULTIPLE RESPONSES ACCEPTED]



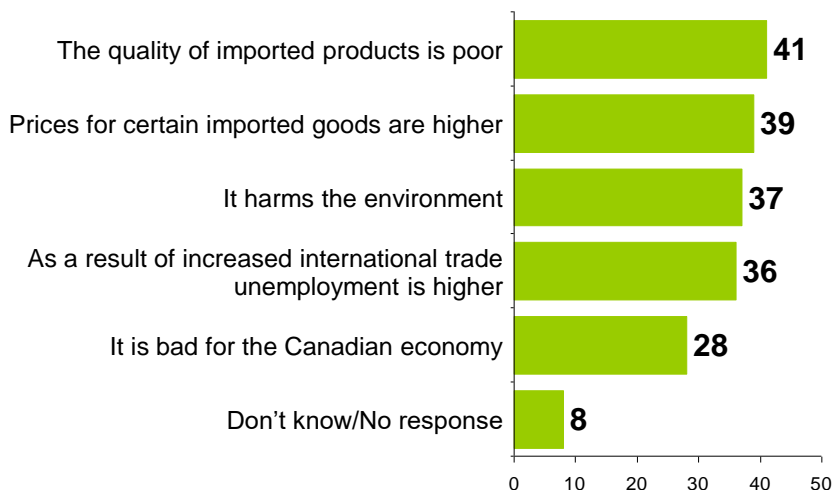
Note: Only those responses selected by at least 5% displayed above

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BASE: See benefits to trade; February 6-19, 2020, n=1,299, MOE +/- 2.7%, 19 times out of 20

Reasons for not seeing benefits to trade

Q. [IF NO] Why do you think you are NOT benefitting from international trade? [MULTIPLE RESPONSES ACCEPTED]



Note: Only those responses selected by at least 5% displayed above

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BASE: Do not see benefits to trade; February 6-19, 2020, n=1,299, MOE +/- 2.7%, 19 times out of 20

9. Conclusions and Implications

Canadians hold generally positive views of international trade. On most of the indicators tested, respondents see trade as beneficial to Canada, particularly when it comes to fostering innovation and stimulating job growth. Indeed, fully three-quarters (75 per cent) believe Canada's international trade has had a positive impact on the development of Canadian technology and innovation. Furthermore, the vast majority of Canadians believe that trade has become more important in recent years, and are open to further expanding trade. Most Canadians feel they personally benefit from trade, with the perceived benefits centred on improved choice, lower prices, and better job opportunities.

One potential problem area, however, is the perception that the benefits of international trade are enjoyed to a much greater degree by large corporations and the rich. Canadians are divided on whether the benefits from international trade are filtering down through the economy, and respondents express serious doubts as to whether Canada's more marginalized communities – particularly Indigenous and LGBTQ2 Canadians – are benefitting from trade. Nevertheless, most Canadians see trade as an avenue to promote trade opportunities for these groups, as well as other social goals.

When it comes to considering Canada's approach to trade, respondents put forward a number of important considerations, particularly economic issues such as job creation, support for Canadian businesses, and innovation. However, protections for health and environmental standards, protecting intellectual property, ensuring a more equitable division of the benefits of trade, and diversifying Canada's markets are also top-tier priorities.

Given the level of media attention to renegotiating NAFTA, it is not surprising that recall of news related to international trade is up from 2001, with the bulk of the subject matter pertaining to CUSMA. Familiarity with Canada's other recently signed trade agreements – CETA, and CPTPP – is relatively low, however, among those who are familiar with the agreements, clear majorities are optimistic about their impacts.

Key regional and demographic differences

Across the country, Canadians hold broadly positive impressions of international trade and there is no region where trade is viewed in a negative light. The relatively few significant regional differences suggest that Albertans are more apt to see benefits to trade, while Quebec residents are

somewhat more skeptical. For example, 72 per cent of Alberta residents say more free trade is a good thing, compared to 56 per cent of Quebec residents. Of particular note, 52 per cent of Quebecers feel the benefits of trade are enjoyed primarily by the wealthy, a sentiment echoed by just 33 per cent of Albertans. Quebec residents are also consistently less likely to say they are familiar with current trade issues.

Throughout the survey, men consistently score higher than women on self-rated knowledge of issues related to international trade. For instance, 43 per cent say they are familiar with CETA, compared to just 21 per cent women. Nevertheless, men and women express generally comparable attitudes on trade. Where there are differences, it is consistently men who convey a moderately more positive view of the benefits of trade. For instance, 59 per cent per cent say their quality of life has improved as a result of international trade, compared to 49 per cent of women. Women are more likely to perceive trade as a means of advancing labour and human rights and are more apt to rank support for farmers, environmental standards, and gender equality as important goals for future trade negotiations.

In general, older Canadians – particularly those ages 65 and over – hold somewhat more positive views of international trade, most notably when it comes to its impacts on jobs and the economy. For instance, 69 per cent of those 65 and over say trade has a positive impact on the number of jobs in Canada, compared to 60 per cent on average. Older Canadians are also more likely to see trade as an avenue for promoting an array of social and economic goals and they place a particular importance on diversifying Canada's export markets. They are more likely to reject the notion that the benefits of trade are enjoyed exclusively by the wealthy, and are more likely to view the rise of protectionism as a bad thing. Older Canadian are more likely to factor country of origin into their purchasing decisions, and they are more apt to hold the view that Canadian-made products are known for their superior quality. Self-rated familiarity with trade issues consistently rises with age.

Self-rated familiarity with trade issues rises with educational attainment, with university graduates consistently saying they are more familiar with Canada's various trade agreements. Canadians of all academic standings hold similar views on trade, though the university educated are more likely to say they personally benefit from trade, and are more apt to say protectionism is a bad thing. High school graduates are significantly more likely to see lowering prices and broadening consumer choice as a key priority.

Implications

Perhaps the most interesting finding is that Canadians remain unified and bullish about international trade. There is remarkable stability in positive attitudes to trade and globalization. If anything, these attitudes have improved somewhat in recent years. If protectionism and anti-

globalization are currently sweeping parts of the Western world, they do not seem to have found much traction in Canada; there is no evidence that enthusiasm for international trade is diminishing.

Canadians like international trade mainly because of the economic benefits it brings. They also recognize other benefits, and there are a number of goals that they would like to see linked to trade, such as the environment, labour, and women's issues. However, these objectives are ultimately subordinate to economic issues.

Perceptions of trade are dominated by CUSMA. Canadians are widely supportive of CUSMA and while they do not seem to believe the agreement will bring many benefits beyond those provided by NAFTA, they do not see any obvious downsides to the agreement. In other words, Canadians seem pleased with how the deal was negotiated.

Fluency on international trade is mixed. Canadians recognize the role of the United States, but seem to overestimate the demand for Canadian exports in China relative to markets such as Europe and the United Kingdom.

Canadians see trade as primarily benefitting big business (indeed, when respondents were asked about the benefits of trade, there was a huge drop-off when the scope of the question shifted to small businesses). Interestingly, Canadians do not appear too bothered by this apparent lack of equity; they seem to acknowledge that economic growth in this country is inextricably linked to the performance of our larger companies, although they do express some concerns that the benefits of international trade are not being shared by all Canadians.

APPENDIX A
QUESTIONNAIRE (ENGLISH AND FRENCH)

WINTRO

WEB INTRO

We are conducting a study on behalf of the Government of Canada to obtain the views of Canadians on a range of important issues. Please be assured that we are not selling or soliciting anything. The survey is voluntary and your responses will be kept entirely confidential and anonymous. The survey should take about 15 minutes to complete.

A few reminders before beginning:

- On each screen, after selecting your answer, click on the "Continue" button at the bottom of the screen to move forward in the questionnaire.
- If you leave the survey before completing it, you can return to the survey URL later, and you will be returned to the page where you left off. Your answers up to that point in the survey will be saved.
- If you have any questions about how to complete the survey, please call *Probit* at 866.211.8881 or send an email to online@ekos.com. Thank you in advance for your participation.

Q1A

Do you recall any news in recent months on issues related to international trade?

Yes.....	1	->Q1B
No	2	
Don't know/No response.....	99	

Q1B

If... Q1A = 1

If yes, what was the topic of the report?

Please specify:	77
Don't know/No response.....	99

PQ2

In your opinion, how important are the following goals when considering Canada's approach to international trade? Please use a 7-point scale where 1 is not at all important, 7 is very important and the mid-point 4 is somewhat important.

Q2A

Creating jobs in Canada		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2B

Promoting gender equality		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2C

Ensuring Canadian environmental and health standards are respected		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2D

Ensuring that trade benefits everyone		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2E

Offering consumers the widest choice of products and services at the lowest prices		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2F

Supporting Canadian businesses		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2G

Encouraging innovation in Canada		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2H

Protecting Canadian Intellectual property		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2I

Diversifying Canada's export markets		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2J

Supporting farmers/agricultural sector		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

Q2K

Increasing foreign direct investment in Canada		
Not at all important 1	1	
2	2	
3	3	
Somewhat important 4	4	
5	5	
6	6	
Very important 7	7	
Don't know/ No response	99	S

PQ3

Please tell me the top five most important markets/countries for Canadian exports over the last few years?

Q3

First		
United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q3A [0,1]

Second		
United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q3B [0,1]

Third		
United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q3C [0,1]

Fourth		
United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q3D [0,1]

Fifth		
United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

PQ4

Which sectors do you think make up the largest part of Canada's exports?

Q4

Largest		
Natural Resources/Energy	1	I
Manufacturing	2	I
Agricultural Products.....	3	I
Automobiles and car parts	4	I
Hi-tech	5	I
Education	6	I
Clean/environmental technology	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q4A [0,1]

Second largest		
Natural Resources/Energy	1	I
Manufacturing	2	I
Agricultural Products.....	3	I
Automobiles and car parts	4	I
Hi-tech	5	I
Education	6	I
Clean/environmental technology	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q5

Over the past 10 years, do you think international trade has become less important or more important in terms of its contribution to the Canadian economy? Please use a 7-point scale where 1 is much less important, 7 is much more important and the mid-point 4 is neither.

Much less important 1	1
2	2
3	3
Neither 4	4
5	5
6	6
Much more important 7	7
Don't know/ No response.....	99

Q6

Why do you feel this way?

Please specify:	77
Don't know/No response.....	99

Q7

Which of the following two statements is closest to your point of view?

The benefits from international trade filter down through the economy and most Canadians benefit through jobs, taxes companies pay, and a better selection of goods available to consumers.....	1	
OR	2	N
The benefits from international trade go mostly to large corporations and wealthy investors, with little left over for average Canadians.....	3	
Don't know/No response.....	99	

PQ8

To what extent would you say that international trade benefits each of the following within Canada? Please use a 7-point scale where 1 is to no extent whatsoever, 7 is to a great extent and the mid-point 4 is to a moderate extent.

Q8A

Large businesses		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8B

Businesses in your community		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8C

Small and medium-sized enterprises (SMEs)		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8D

You and your family		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8E

Women		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8F

Indigenous people		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8G

LGBTQ2 communities		
No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q8H

Youth

No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	S

Q9

To what extent do you think Canadian businesses investing in other countries benefits Canada?
Please use a 7-point scale where 1 is to no extent whatsoever, 7 is to a great extent and the mid-point 4 is to a moderate extent.

No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	

Q10

Using the same scale to what extent do you think international businesses investing in Canada benefits the Canadian economy?

No extent whatsoever 1	1	
2	2	
3	3	
Moderate extent 4	4	
5	5	
6	6	
Great extent 7	7	
Don't know/ No response	99	

Q11 [1,5]

In your opinion, what are Canadian products best known for internationally?

Select all that apply

High quality	1	
Adhering to environmental standards	2	
Treating workers fairly during production.....	3	
Low price.....	4	
Other (Please specify).....	77	
Don't know/No response.....	99	X

Q12

To what extent does the origin of the country which produces or manufactures a product affect your decision to purchase the product? Please use a 7-point scale where 1 is to no extent whatsoever, 7 is to a great extent and the mid-point 4 is to a moderate extent.

No extent whatsoever 1	1
2	2
3	3
Moderate extent 4	4
5	5
6	6
Great extent 7	7
Don't know/ No response.....	99

Q13

Many people talk about the rise of protectionism in the United States and Europe which, among other things, includes growing opposition to trade and globalization. Overall, do you think this rise of protectionism is a good thing or a bad thing for Canada?

Bad thing	1
Neither good nor bad	2
Good thing	3
Don't know/No response.....	99

PQ14

Please tell me the extent to which you agree or disagree with each of the following statements using a 7-point scale where 7 means strongly agree, 1 means strongly disagree and the mid-point 4 means neither.

Q14A

I worry increased international trade is likely to result in countries lowering their environmental standards to be more competitive

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q14B

Canada should consider the interests of Canadians in its approach to international trade

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q14C

International trade is a good way for Canada to promote trade opportunities for all (notably women, indigenous, Small and medium-sized enterprises (SMEs))

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q14D

International trade is a good way for Canada to promote environmental responsibility

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q14E

International trade is a good way for Canada to promote respect for labour rights

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q14F

International trade is a good way for Canada to promote respect for human rights

Strongly disagree 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Strongly agree 7	7	
Don't know/ No response	99	S

Q16

Is more free trade a good thing or a bad thing for Canada?

Bad thing	1	
Neither good nor bad	2	
Good thing	3	
Don't know/No response	99	

PQ17

Over the last few decades, Canada has been opening up trade with many countries. Which countries do you believe Canada should be trying to tie itself to more?

Q17

First selection:

United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

Q17A [0,1]

Second selection:

United States.....	1	I
United Kingdom	2	I
China	3	I
Japan	4	I
Mexico	5	I
India.....	6	I
Germany	7	I
Other (Please specify).....	77	
Don't know/ No response.....	99	X

PQ18

As you may know, Canada, the United States, and Mexico recently signed the Canada-US-Mexico agreement on free trade, which is intended to replace NAFTA. What do you think will be the impact of this new NAFTA on Canadians?

Q18

Answer 1:

77	77	
Don't know/ No response.....	99	X

Q18A [0,1]

Answer 2:

77	77	
Don't know/ No response	99	X

Q19

As you may know, Canada recently signed the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), a free trade agreement between Canada and 10 other countries in the Asia-Pacific region. How familiar are you with this agreement?

Very familiar	1	->Q20
Somewhat familiar.....	2	->Q20
Not very familiar	3	
Not at all familiar.....	4	
Don't know/No response.....	99	

Q20

If... Q19 = 1 or Q19 = 2

Based on what you know, would you say the CPTPP's impact on Canada is positive or negative?

Very positive	1
Somewhat positive.....	2
Somewhat negative.....	3
Very negative.....	4
Don't know/No response.....	99

Q21

As you may know, Canada recently signed the Comprehensive Economic and Trade Agreement (CETA), a free trade agreement between Canada, the European Union and its members states. How familiar are you with this agreement?

Very familiar	1	->Q22
Somewhat familiar.....	2	->Q22
Not very familiar	3	
Not at all familiar.....	4	
Don't know/No response.....	99	

Q22

If... Q21 = 1 or Q21 = 2

Based on what you know, would you say CETA's impact on Canada is positive or negative?

Very positive	1
Somewhat positive.....	2
Somewhat negative.....	3
Very negative.....	4
Don't know/No response.....	99

Q23A

Are you aware that the Government of Canada has programs available to help companies do business abroad?

Yes.....	1	->Q23B
No	2	
Don't know/No response.....	99	

Q23B

If... Q23A = 1

If yes, which programs are you aware of?

Please specify:	77
Don't know/No response.....	99

PQ24

What impact do you think Canada's international trade has had on each of the following? Please use a 7-point scale where 1 is an extremely negative impact, 7 is an extremely positive impact and the mid-point 4 means neither.

Q24A

Development of Canadian technology and innovation	
Extremely negative impact 1	1
2	2
3	3
Neither 4	4
5	5
6	6
Extremely positive impact 7	7
Don't know/ No response	99

S

Q24B

The number of jobs in Canada	
Extremely negative impact 1	1
2	2
3	3
Neither 4	4
5	5
6	6
Extremely positive impact 7	7
Don't know/ No response	99

S

Q24C

Environmental standards in Canada and abroad

Extremely negative impact 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Extremely positive impact 7	7	
Don't know/ No response	99	S

Q24D

Improving working conditions abroad		
Extremely negative impact 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Extremely positive impact 7	7	
Don't know/ No response	99	S

Q24E

Your quality of life		
Extremely negative impact 1	1	
2	2	
3	3	
Neither 4	4	
5	5	
6	6	
Extremely positive impact 7	7	
Don't know/ No response	99	S

Q25A

Do you feel that you are currently benefitting from international trade?

Yes	1	->Q25B
No	2	->Q25C
Don't know/No response	99	

Q25B [1,7]

If... Q25A = 1

If yes, why do you think you are benefitting from international trade?

Select all that apply

There is a wider choice for consumers	1	
Imported products are cheaper.....	2	
It is good for the Canadian economy	3	
Trade with countries outside Canada can create jobs	4	
Imported products are better quality	5	
Your job depends on international trade.....	6	
Other (Please specify).....	77	
Don't know/No response.....	99	X

Q25C [1,6]

If... Q25A = 2

If no, why do you think you are not benefitting from international trade?

Select all that apply

The quality of imported products is poor.....	1	
Prices for certain imported goods are higher	2	
As a result of increased international trade unemployment is higher	3	
It harms the environment	4	
It is bad for the Canadian economy	5	
Other (Please specify).....	77	
Don't know/No response.....	99	X

DEMIN

These last few questions will be used for statistical purposes only.

QGENDR

Are you...?

Male.....	1	
Female	2	
Other	3	
Prefer not to answer	99	

QPROV

What province or territory do you live in?

British Columbia.....	1
Alberta	2
Saskatchewan	3
Manitoba.....	4
Ontario	5
Quebec	6
New Brunswick	7
Nova Scotia	8
Prince Edward Island.....	9
Newfoundland	10
Yukon	11
Northwest Territories.....	12
Nunavut	13
Prefer not to say.....	99

QEDUC

What is the highest level of schooling that you have completed?

Grade 8 or less	1
Some high school.....	2
High School diploma or equivalent	3
Registered Apprenticeship or other trades certificate or diploma.....	4
College, CEGEP or other non-university certificate or diploma	5
University certificate or diploma below Bachelor's level	6
Bachelor's degree	7
Post graduate degree above bachelor's level.....	8
Prefer not to answer	99

Q26

To the best of your knowledge, does anyone in your household work for a company that is involved in international trade?

Yes.....	1
No	2
Don't know/No response.....	99

QAGE

In which of the following age categories do you belong?

18-34 years	1
35-49 years	2
50-64 years	3
65 years or older	4
Prefer not to answer.....	99

QINC

What is your annual household income from all sources before taxes?

Under \$20,000	1
Between \$20,000 and \$39,999.....	2
Between \$40,000 and \$59,999.....	3
Between \$60,000 and \$79,999.....	4
Between \$80,000 and \$99,999.....	5
Between \$100,000 and \$149,999.....	6
\$150,000 or above	7
Prefer not to answer.....	99

Q27 [1,4]

Do you consider yourself to be any of the following?

Select all that apply

A person with a disability	1	
A member of a visible minority group.....	2	
An Indigenous person	3	
A member of the LGBTQ2 community.....	4	
None of the above.....	5	X
Don't know / Prefer not to answer	99	X

QBORN

In what country were you born?

Canada	1
Outside Canada, please specify:	77
Refused.....	98
Don't know	99

THNK

Thank you very much for taking the time to complete this survey.

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WINTRO

WEB INTRO

Nous menons une étude pour le compte du gouvernement du Canada afin de connaître les points de vue de Canadiens et de Canadiennes sur un éventail d'enjeux importants. Sachez que nous ne faisons pas de vente ni de sollicitation pour quoi que ce soit. Le sondage est effectué sur une base volontaire, et vos réponses demeureront entièrement anonymes et confidentielles. Il vous faudra environ 15 minutes pour y répondre.

Quelques rappels avant de commencer:

- Sur chaque écran, après avoir sélectionné votre réponse, cliquez sur le bouton « Continuer » au bas de l'écran pour vous déplacer vers l'avant dans le questionnaire.
- Si vous quittez le sondage avant d'avoir terminé, vous pourrez y revenir plus tard au moyen de l'adresse URL et vous obtiendrez la page où vous étiez en quittant. Les réponses que vous aurez données jusque-là auront été sauvegardées.
- Pour toute question sur la façon de remplir le questionnaire, veuillez téléphoner à Probit, au numéro 866.211.8881, ou envoyer un courriel à online@ekos.com. Nous vous remercions à l'avance de votre participation.

Q1A

Vous souvenez-vous d'une nouvelle qui traitait de questions liées au commerce international au cours des derniers mois?

Oui	1	->Q1B
Non	2	
Je ne sais pas/Pas de réponse	99	

Q1B

If... Q1A = 1

Si oui, quel était le sujet du reportage?

Veuillez préciser :	77
Je ne sais pas/Pas de réponse	99

PQ2

Selon vous, à quel point les objectifs suivants sont-ils importants lors de l'examen de l'approche qu'adopte le Canada en matière de commerce international? Veuillez utiliser une échelle de sept

points où 1 signifie que cela n'est pas du tout important, 7 que cela est extrêmement important et le point milieu, 4, que cela est moyennement important.

Q2A

Créer des emplois au Canada		
Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2B

Promouvoir l'égalité des sexes		
Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2C

Assurer le respect des normes canadiennes liées à la santé et à l'environnement		
Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2D

Veiller à ce que le commerce profite à tout le monde

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2E

Offrir aux consommateurs le plus grand choix de produits et de services aux prix les plus bas

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2F

Soutenir les sociétés canadiennes

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2G

Encourager l'innovation au Canada

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2H

Protéger la propriété intellectuelle canadienne

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2I

Diversifier les marchés d'exportation du Canada

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2J

Soutenir les agriculteurs et le secteur agricole

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q2K

Augmenter les investissements directs étrangers au Canada

Pas du tout important 1	1	
2	2	
3	3	
Moyennement important 4.....	4	
5	5	
6	6	
Extrêmement important 7	7	
Je ne sais pas/ Pas de réponse	99	S

PQ3

Quels sont les cinq principaux marchés et pays pour les exportations canadiennes au cours des dernières années?

Q3

Premier		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q3A [0,1]

Deuxième		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q3B [0,1]

Troisième		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q3C [0,1]

Quatrième		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q3D [0,1]

Cinquième		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

PQ4

Selon vous, quels secteurs représentent la plus grande part des exportations canadiennes?

Q4

Plus grande part		
Ressources naturelles et énergie	1	I
Fabrication.....	2	I
Produits agricoles	3	I
Automobiles et pièces automobiles	4	I
Hautes technologies	5	I
Éducation	6	I
Technologies environnementales/propres.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q4A [0,1]

Deuxième plus grande part		
Ressources naturelles et énergie	1	I
Fabrication.....	2	I
Produits agricoles	3	I
Automobiles et pièces automobiles	4	I
Hautes technologies	5	I
Éducation	6	I
Technologies environnementales/propres.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q5

Diriez-vous qu'au cours des 10 dernières années, le commerce international est devenu moins important ou plus important en ce qui concerne sa contribution à l'économie canadienne? Veuillez répondre selon une échelle de sept points où 1 signifie beaucoup moins important, 7, beaucoup plus important et le point milieu, 4, ni l'un ni l'autre.

Beaucoup moins important 1	1
2	2
3	3
Ni l'un ni l'autre 4	4
5	5
6	6
Beaucoup plus important 7	7
Je ne sais pas/ Pas de réponse	99

Q6

Pourquoi croyez-vous cela?

Veuillez préciser :	77
Je ne sais pas/Pas de réponse	99

Q7

Lequel des deux énoncés suivants se rapproche le plus de votre point de vue?

Les avantages du commerce international percolent dans l'économie et la plupart des Canadiens en profitent par le biais d'emplois, des impôts que paient les sociétés et d'un meilleur choix de biens qui sont offerts aux consommateurs	1	
OU	2	N
Le commerce international profite principalement aux grandes entreprises et aux investisseurs riches, et il en reste peu pour les Canadiens moyens.....	3	
Je ne sais pas/Pas de réponse	99	

PQ8

D'après vous, à quel point le commerce international est-il avantageux pour chacun des aspects suivants au sein du Canada? Veuillez répondre en utilisant une échelle de sept points où 1 signifie pas du tout, 7 signifie énormément et le point milieu, 4 signifie moyennement.

Q8A

Les grandes sociétés		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8B

Les entreprises de votre collectivité		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8C

Les petites et moyennes entreprises (PME)		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8D

Vous et votre famille		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8E

Les femmes		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8F

Les Autochtones		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8G

La communauté LGBTQ		
Pas du tout 1	1	
2	2	
3	3	
Moyennement 4	4	
5	5	
6	6	
Énormément 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q8H

Les jeunes	
Pas du tout 1	1
2	2
3	3
Moyennement 4	4
5	5
6	6
Énormément 7	7
Je ne sais pas/ Pas de réponse	99 S

Q9

À quel point croyez-vous que les entreprises canadiennes qui investissent dans d'autres pays profitent au Canada? Veuillez répondre en utilisant une échelle de sept points où 1 signifie pas du tout, 7 signifie énormément et le point milieu, 4 signifie moyennement.

Pas du tout 1	1
2	2
3	3
Moyennement 4	4
5	5
6	6
Énormément 7	7
Je ne sais pas/ Pas de réponse	99

Q10

En utilisant la même échelle, dans quelle mesure croyez-vous que les entreprises internationales qui investissent au Canada profitent à l'économie canadienne?

Pas du tout 1	1
2	2
3	3
Moyennement 4	4
5	5
6	6
Énormément 7	7
Je ne sais pas/ Pas de réponse	99

Q11 [1,5]

Selon vous, pour quelle raison les produits canadiens sont-ils les plus connus à l'échelle internationale?

Choisir tout ce qui s'applique	
Haute qualité.....	1
Respect de normes environnementales	2
Traitement équitable des travailleurs pendant la production	3
Bas prix.....	4
Autre (Veuillez préciser)	77
Je ne sais pas/Pas de réponse	99 X

Q12

Dans quelle mesure l'origine du pays qui produit ou fabrique un produit influence-t-elle votre décision d'acheter le produit? Veuillez répondre en utilisant une échelle de sept points où 1 signifie pas du tout, 7 signifie énormément et le point milieu, 4 signifie moyennement.

Pas du tout 1	1
2	2
3	3
Moyennement 4	4
5	5
6	6
Énormément 7	7
Je ne sais pas/ Pas de réponse	99

Q13

Beaucoup de gens parlent de l'augmentation du protectionnisme aux États-Unis et en Europe, ce qui entraîne notamment une opposition grandissante à l'égard du commerce et de la mondialisation. En général, croyez-vous que la hausse du protectionnisme est une bonne chose ou une mauvaise chose pour le Canada?

Mauvaise chose	1
Ni bonne ni mauvaise	2
Bonne chose.....	3
Je ne sais pas/Pas de réponse	99

PQ14

Veuillez indiquer la mesure dans laquelle vous êtes d'accord ou en désaccord avec l'énoncé suivant. Veuillez répondre en utilisant une échelle de sept points où 7 signifie que vous êtes

fermement d'accord, 1 signifie que vous êtes fermement en désaccord, et le point milieu, 4, signifie que vous n'êtes ni d'accord ni en désaccord.

Q14A

Je crains que l'augmentation du commerce international entraîne les pays à baisser leurs normes environnementales pour être plus concurrentiels

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q14B

Le Canada devrait tenir compte des intérêts des Canadiens dans son approche en matière de commerce international.

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q14C

Le commerce international est un bon moyen pour le Canada de promouvoir des débouchés commerciaux pour tous (notamment les femmes, les Autochtones, les petites et moyennes entreprises (PME))

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q14D

Le commerce international est un bon moyen pour le Canada de promouvoir la responsabilité environnementale

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q14E

Le commerce international est un bon moyen pour le Canada de promouvoir le respect des droits des travailleurs

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q14F

Le commerce international est un bon moyen pour le Canada de promouvoir le respect des droits de la personne

Fermement en désaccord 1	1	
2	2	
3	3	
Ni d'accord ni en désaccord 4	4	
5	5	
6	6	
Fermement d'accord 7	7	
Je ne sais pas/ Pas de réponse	99	S

Q16

Davantage de libre échange serait-il une bonne chose ou une mauvaise chose pour le Canada?

Mauvaise chose	1	
Ni bonne ni mauvaise	2	
Bonne chose.....	3	
Je ne sais pas/Pas de réponse	99	

PQ17

Au cours des dernières décennies, le Canada a ouvert son commerce à de nombreux pays. Selon vous, avec quels pays le Canada devrait-il essayer de tisser le plus de liens?

Q17

Premier choix :

États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

Q17A [0,1]

Deuxième choix :		
États-Unis	1	I
Royaume-Uni	2	I
Chine	3	I
Japon.....	4	I
Mexique	5	I
Inde	6	I
Allemagne.....	7	I
Autre (Veuillez préciser)	77	
Je ne sais pas/ Pas de réponse	99	X

PQ18

Comme vous le savez peut-être, le Canada, les États-Unis et le Mexique ont récemment conclu l'Accord Canada–États-Unis–Mexique de libre-échange, qui vise à remplacer l'ALENA. Selon vous, quelles seront les répercussions de ce nouvel ALENA pour les Canadiens?

Q18

Réponse 1:		
77	77	
Je ne sais pas/ Pas de réponse	99	X

Q18A [0,1]

Réponse 2:		
77	77	
Je ne sais pas/ Pas de réponse	99	X

Q19

Comme vous le savez peut-être, le Canada a récemment signé l'Accord de partenariat transpacifique global et progressiste (PTPGP), un accord de libre-échange entre le Canada et dix pays de la région Asie-Pacifique. À quel point connaissez-vous bien cet accord?

Très bien	1	->Q20
Assez bien.....	2	->Q20
Pas très bien.....	3	
Pas du tout	4	
Je ne sais pas/Pas de réponse	99	

Q20

If... Q19 = 1 or Q19 = 2

Selon ce que vous savez, diriez-vous que les répercussions du PTPGP sur le Canada sont positives ou négatives?

Très positives	1
Plutôt positives	2
Plutôt négatives	3
Très négatives	4
Je ne sais pas/Pas de réponse	99

Q21

Comme vous le savez peut-être, le Canada a récemment signé l'Accord économique et commercial global entre le Canada et l'Union européenne (AECG), un accord de libre-échange entre le Canada, l'Union européenne et ses États membres. À quel point connaissez-vous bien cet accord?

Très bien	1	->Q22
Assez bien.....	2	->Q22
Pas très bien.....	3	
Pas du tout	4	
Je ne sais pas/Pas de réponse	99	

Q22

If... Q21 = 1 or Q21 = 2

D'après ce que vous savez, diriez-vous que les répercussions de l'AECG sur le Canada sont positives ou négatives?

Très positives	1
Plutôt positives	2
Plutôt négatives	3
Très négatives	4
Je ne sais pas/Pas de réponse	99

Q23A

Savez-vous que le gouvernement du Canada a des programmes dont l'objectif est d'aider des entreprises à faire des affaires à l'étranger?

Oui.....	1	->Q23B
Non.....	2	
Je ne sais pas/Pas de réponse.....	99	

Q23B

If... Q23A = 1

Le cas échéant, quels programmes connaissez-vous?

Veillez préciser :	77
Je ne sais pas/Pas de réponse	99

PQ24

D'après vous, quel impact le commerce international du Canada a-t-il dans chacun des domaines suivants? Veuillez répondre en utilisant une échelle de sept points où 1 signifie un impact extrêmement négatif, 7 signifie un impact extrêmement positif et le point milieu, 4 signifie ni l'un ni l'autre.

Q24A

Le développement de la technologie et de l'innovation au Canada	
Un impact extrêmement négatif 1	1
2	2
3	3
Ni l'un ni l'autre 4	4
5	5
6	6
Un impact extrêmement positif 7	7
Je ne sais pas/ Pas de réponse	99

S

Q24B

Le nombre d'emplois au Canada	
Un impact extrêmement négatif 1	1
2	2
3	3
Ni l'un ni l'autre 4	4
5	5
6	6
Un impact extrêmement positif 7	7
Je ne sais pas/ Pas de réponse	99

S

Q24C

Les normes environnementales au Canada et à l'étranger		
Un impact extrêmement négatif 1.....	1	
2.....	2	
3.....	3	
Ni l'un ni l'autre 4.....	4	
5.....	5	
6.....	6	
Un impact extrêmement positif 7.....	7	
Je ne sais pas/ Pas de réponse.....	99	S

Q24D

L'amélioration des conditions de travail à l'étranger		
Un impact extrêmement négatif 1.....	1	
2.....	2	
3.....	3	
Ni l'un ni l'autre 4.....	4	
5.....	5	
6.....	6	
Un impact extrêmement positif 7.....	7	
Je ne sais pas/ Pas de réponse.....	99	S

Q24E

Votre qualité de vie		
Un impact extrêmement négatif 1.....	1	
2.....	2	
3.....	3	
Ni l'un ni l'autre 4.....	4	
5.....	5	
6.....	6	
Un impact extrêmement positif 7.....	7	
Je ne sais pas/ Pas de réponse.....	99	S

Q25A

Pensez-vous que vous profitez actuellement du commerce international?		
Oui.....	1	->Q25B
Non.....	2	->Q25C
Je ne sais pas/Pas de réponse.....	99	

Q25B [1,7]

If... Q25A = 1

Le cas échéant, pourquoi pensez-vous que vous tirez profit du commerce international?

Choisir tout ce qui s'applique

- | | | |
|--|----|---|
| Il y a un plus grand choix pour les consommateurs..... | 1 | |
| Les produits importés sont moins chers..... | 2 | |
| C'est bon pour l'économie canadienne | 3 | |
| Le commerce avec des pays à l'extérieur du Canada peut créer des emplois | 4 | |
| Les produits importés sont de meilleure qualité | 5 | |
| Votre emploi dépend du commerce international | 6 | |
| Autre (Veuillez préciser) | 77 | |
| Je ne sais pas/Pas de réponse | 99 | X |

Q25C [1,6]

If... Q25A = 2

Si ce n'est pas le cas, pourquoi pensez-vous que vous ne tirez pas profit du commerce international?

Choisir tout ce qui s'applique

- | | | |
|--|----|---|
| La qualité des produits importés est médiocre..... | 1 | |
| Les prix de certaines marchandises importées sont plus élevés..... | 2 | |
| En raison de l'augmentation du commerce international, le taux de chômage est plus élevé | 3 | |
| Cela nuit à l'environnement | 4 | |
| C'est mauvais pour l'économie canadienne..... | 5 | |
| Autre (Veuillez préciser) | 77 | |
| Je ne sais pas/Pas de réponse | 99 | X |

DEMIN

Les prochaines questions ne seront utilisées qu'à des fins statistiques.

QGENDR

Êtes-vous...?

- | | | |
|-------------------------------|----|--|
| Homme | 1 | |
| Femme | 2 | |
| Autre | 3 | |
| Préfère ne pas répondre | 99 | |

QPROV

Dans quelle province ou quel territoire demeurez-vous?

Colombie-Britannique	1
Alberta	2
Saskatchewan	3
Manitoba	4
Ontario	5
Québec	6
Nouveau-Brunswick	7
Nouvelle-Écosse	8
Île-du-Prince-Édouard	9
Terre-Neuve	10
Yukon	11
Territoires du Nord-Ouest	12
Nunavut	13
Je préfère ne pas répondre	99

QEDUC

Quel est le niveau de scolarité le plus élevé que vous avez atteint?

8e année ou moins	1
Études secondaires non terminées	2
Diplôme d'études secondaires ou l'équivalent	3
Apprenti inscrit ou autre certificat ou diplôme de formation professionnelle	4
Diplômes d'études collégiales, de cégep ou autre certificat ou diplôme non universitaire	5
Certificat universitaire ou diplôme inférieur au baccalauréat	6
Baccalauréat	7
Grade universitaire supérieur au baccalauréat	8
Préfère ne pas répondre	99

Q26

À ce que vous sachiez, la compagnie pour laquelle vous travaillez fait-elle du commerce international?

Oui	1
Non	2
Je ne sais pas/Pas de réponse	99

QAGE

Auquel des groupes d'âge suivants appartenez-vous?

18 à 34 ans	1
35 à 49 ans	2
50 à 64 ans	3
65 ans ou plus	4
Préfère ne pas répondre	99

QINC

Quel est le revenu annuel de votre ménage de toutes sources avant impôts?

Moins de 20 000 \$	1
Entre 20 000 \$ et 39,999 \$	2
Entre 40 000 \$ et 59,999 \$	3
Entre 60 000 \$ et 79,999 \$	4
Entre 80 000 \$ et 99,999 \$	5
Entre 100 000 \$ et 149,999 \$	6
150 000 \$ et plus	7
Préfère ne pas répondre	99

Q27 [1,4]

Vous considérez-vous comme l'un des suivants?

Choisir tout ce qui s'applique	
Une personne ayant un handicap	1
Un membre d'une minorité visible	2
Une personne autochtone	3
Un(e) membre de la communauté LGBTQ2	4
Aucune de ces réponses	5
Je ne sais pas / Préfère ne pas répondre	99
	X
	X

QBORN

Dans quel pays êtes-vous né(e)?

Canada	1
Extérieur du Canada, veuillez préciser :	77
Je refuse de répondre	98
Je ne sais pas	99

THNK

Merci beaucoup d'avoir pris le temps de répondre à ce sondage.

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