



Italian Perceptions of Comprehensive Economic and Trade Agreement (CETA) and the Reputation of Canadian Products

EXECUTIVE SUMMARY

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Ce rapport est aussi disponible en français

This public opinion research report presents the results of an online survey conducted by Leger Marketing Inc. on behalf of Global Affairs Canada. The research study was conducted in January 2021 with 2,000 Italians.

Cette publication est aussi disponible en français sous le titre *Perceptions des italiens à l'égard de l'accord économique et commercial global (AECG) entre le Canada et l'Union européenne et de la réputation des produits canadiens*.

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1. Executive Summary

Leger is pleased to present to Global Affairs Canada this report on the results of a quantitative survey on Italian perceptions of Canada and the Comprehensive Economic Trade Agreement (CETA).

This report was prepared by Leger, which was mandated by Global Affairs Canada (contract No. 08283-190680/001/CY, granted on February 14, 2020, and that has a value of 78,044.02\$), in partnership with its counterpart: BVA-Doxa.

1.1 Background and objectives

The Canada-European Union Comprehensive Economic Trade Agreement (CETA) is a sensitive issue for Canada in Italy, where various sectorial players (particularly in the agricultural sector) are trying to influence political actors to limit the access of Canadian products to the Italian market or to induce them to reject the agreement. At the heart of this campaign, led by Italian actors against the free trade agreement, is the reputation of Canadian products, particularly agri-food products (including wheat), and Canadian brands.

It is in this highly contentious context that Global Affairs Canada commissioned a survey of the general population in Italy to explore Italians' perceptions of Canada, in general, but also of Canadian products and the safety of Canadian agri-food products.

This study will support the Government of Canada's efforts to diversify its economic and trading partners. The ratification of the CETA is done individually by the EU member states. So far, more than half of the member states have ratified the agreement. Given the provisional application (it is currently being applied on a provisional basis), Canadians benefit already from the agreement.

Specifically, the research focused on the following key objectives:

- To determine whether Italians are for or against the CETA, and why;
- To understand Italian perceptions of Canadian food products, including agri-food;
- To determine whether Italians feel that Canadian agri-food products are safe to consume; and
- To understand Italian perceptions of Canada, and Canadians more generally.

1.2 Methodology

To achieve the goals of the study, a quantitative research plan based on a hybrid telephone methodology (landline and cellphone) was developed. Telephone surveys were completed using computer-assisted telephone interviewing (CATI) technology. Data collection for this survey took place between January 14 and 31, 2021. A total sample of 2,000 Italians ages 18 and over living in all regions of Italy were surveyed. The overall response rate for the survey was 21.22%.

Particular attention was paid to ensure that the distribution of respondents was representative of the general population, while ensuring that a minimum number of respondents from each region of the country was surveyed. Using data from the most recent Italian census, the results were weighted according to age, gender, and region.

Since survey respondents were randomly selected, the sample collected has the characteristics of a probability sample. The results of this survey are representative of the state of opinion of the Italian population. The margin of error for a probability sample of this size is $\pm 2.19\%$, and that is 19 times out of 20 (confidence interval of 95%).

Details of the methodology and the survey questionnaire have been appended to this document (please refer to [Appendix A: Detailed research methodology](#) and [Appendix B: Survey questionnaire](#)).

1.3 Overview of the study findings

1.3.1 General perception of Canada

While most Italians are unfamiliar with Canadian geography, 3 out of 10 respondents have some connection to Canada (whether having visited themselves or knowing friends and family who have visited), and approximately one quarter have plans to visit or do business with Canada. Younger respondents (ages 18 to 34), particularly, have stronger relationships with Canada and are more interested in visiting or doing business.

Canada's image has its strengths and weaknesses. Beyond the traditional and clichéd perceptions of Canada, namely large open spaces and beautiful landscapes, Italians have identified some of the core values of the Canadian identity, such as our vibrant economy (particularly standing out in terms of its cutting-edge technology, and education and research), high standard of living, commitment to the environment, and its multicultural society. Indeed, one of Canada's most distinguishing traits is its social model – more than 9 in 10 respondents agreed that Canada is socially innovative, respectful, and tolerant in terms of diversity. Despite this, Canada was not seen as strongly as being a feminist country; perceptions were also weaker with regards to its arts and culture scene.

Respondents were quite split on whether Canada shares more similarities or differences with the United States. While just over half of Italians felt that Canada is more similar to Europe than the US, approximately half also felt that Canada and the US share many similarities in terms of lifestyle and culture.

Without a doubt, Canada has a power of attraction among the Italians, as the highest-rated country out of 15, with a score that exceeded even Italy's (third behind Canada and Germany).

1.3.2 Perceptions of international trade

Italians largely recognize the benefits of international trade, frequently agreeing that Italy needs to increase its exports. It is a strong sign, then, that Canada is seen as an important economic partner for Italy and was considered the most reliable economic partner for Italy in a post-COVID world. Ultimately, more than 4 in 5 respondents were in favour of increasing trade between Italy and Canada.

Pharmaceuticals, maple syrup, and grains and wheat were the products that Italians are most interested in, as well as the products that garnered the highest confidence ratings amongst respondents (in addition to textiles and clothing). Overall, Canadian food products were considered the third safest, behind German and French food exports (Canada was the preferred oil importer, however).

While Italians are largely in favour of international trade agreements, and with increasing its exports, there is some apprehension: approximately half of the respondents indicated that foreign imports should be limited and are concerned about the impact of free trade agreements on Italy's job market.

1.3.3 Perceptions of CETA

Italy's opinion of CETA continues to develop, with only 1 in 5 respondents having heard of CETA prior to the survey and a lack of familiarity amongst those who had heard of it. Although there is some support for CETA (28%), Italians need to know more in order to feel that the trade agreement is good for Italy's economy – 70% were ultimately unable to say whether they support or oppose it. Knowing more about the benefits of CETA, approximately three-quarters of respondents agreed that CETA has much to offer to both Italy and Canada. Further improving perceptions of CETA is the knowledge that there are strict requirements for health and safety, that it opens up the possibility for temporary work in Canada, and the recognition of Italian agri-food geographical indications.

Finally, this quantitative study revealed an appetite for more information on CETA, particularly regarding the advantages for Italian consumers, export opportunities for Italy, and health regulations and issues. The most trustworthy and credible sources of information are agricultural producers, the Canadian government, and farmers' associations.

1.4 Use of results

The results of this research will enable Global Affairs Canada to update and adjust its messages to ensure that its awareness and communication strategies will have a positive impact on the target audience upon ratification of the CETA.

1.5 Notes on the interpretation of research findings

The observations expressed in this document do not reflect those of Global Affairs Canada. This report was drawn up by Leger based on research conducted specifically for this project. The results of this quantitative study are of a probabilistic nature and can be generalized to the entire Italian population.

Additional Information

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1.6 Declaration of political neutrality and contact information

I hereby certify, as Senior Officer of Leger, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the [Policy on Communications and Federal Identity](#) and of the [Directive on the Management of Communications](#).

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

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