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# Understanding Americans' views on key issues of interest to Canadians

Executive Summary

**Prepared for Global Affairs Canada**

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This public opinion research report presents the results of an online survey conducted by Léger Marketing Inc. on behalf of Global Affairs Canada. The quantitative research study was conducted with 3,183 Americans who can speak English or Spanish residing in different regions of the United States between March 2 to March 27, 2023.

Cette publication est aussi disponible en français sous le titre : ***La compréhension de points de vue des Américains sur des questions présentant un intérêt majeur pour les Canadiens***

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## Executive Summary

Leger is pleased to present Global Affairs Canada with this report on findings from the quantitative survey designed to learn about Americans' views on key issues of interest to Canadians. This report was prepared by Léger Marketing Inc. who was contracted by Global Affairs Canada (contract number CW2248833 awarded November 25, 2022).

## Background and Objectives

A literature review of Public Opinion Research (POR) on Canada-U.S. relations reveals a substantial number of studies that focus on comparing Canadians' and Americans' views on specific policies/events/issues and broad values. While some studies have regional and demographic disaggregates available, others do not. Conversely, there is limited research of Americans' attitudes towards Canada or Canadian policies/events/issues beyond broad trends (i.e., overall favourable/unfavourable impression) or very high-profile issues (e.g., trucker convoy, NAFTA/CUSMA). What's more, much of this POR is freely available via public sources. However, POR on communications, advocacy language and techniques (such as resonance of certain terminology and the effectiveness of advocacy campaigns) is lacking. Hence, POR on these gaps will be most useful in helping Canada achieve its proactive and reactive advocacy objectives in its relationship with the United States.

The purpose of this research is to provide evidence-based data and key insights to guide the ongoing development and deployment of advocacy messaging and other advocacy tools for use by Canada's diplomatic network in the United States.

While this is the main purpose, the study is also aimed at generating ideas to support Canadian advocacy objectives in the U.S and possible initiatives leading to a better understanding of Americans' views on priority Canadian policy positions such as trade, security, energy and the environment. Key objectives include:

- Measuring the effectiveness of Canada's U.S.-facing advocacy messaging on priority themes in different wording/terminology formulations. This would involve testing existing messaging on issues related to themes like energy, trade, security, the environment, and diversity and inclusion to discover what resonates with the target audience, including whether messages are:
  - clear, credible and relevant to the target audiences;
  - appealing to, and appropriate for, the cultural and emotional sensitivities of the audience;
  - memorable in the minds of the audience; and,
  - able to motivate the audience to action.
- Exploring the perceptions, knowledge, and understanding of Americans on various bilateral issues, such as energy, trade, security and the environment to develop effective communication strategies.
- Creating a demographic and geographic segmentation of the respondents.

## Methodology

This public opinion research was conducted via online surveys, using Computer Aided Web Interviewing (CAWI) technology. Because the study was conducted with Americans in the United States, Léger partnered with National Opinion Research Centre (NORC), an American market research company, to conduct data collection. Fieldwork for the survey was carried out from March 2 to March 27, 2023. A total of 3,183 Americans aged 18 and over with demographic characteristics reflective of the American population were surveyed. The sample was drawn randomly from NORC's AmeriSpeak® panel and the overall response rate for the survey was 22.7%.

In order to comply with the best market research practices in the United States, AmeriSpeak® was responsible for data weighting. Using data from the most recent American census, results were weighted within each region by gender, age, race/ethnicity, and education status to ensure the best possible representativeness of the sample within each region and overall. The weight of each region was adjusted to be equivalent to its actual weight in relation to the distribution of the American population. The weighting factors are presented in detail in the appendix of this report.

A pre-test of 44 interviews was completed before launching data collection to validate the programming of the questionnaire in both English and Spanish.

Léger adheres to the most stringent guidelines for quantitative research. This survey was conducted in accordance with the Standards for the [Conduct of Government of Canada Public Opinion Research for online surveys](#).

A complete methodological description is provided in the Appendices section of this document (please see Appendix A).

## Overview of the Findings

### Understanding the U.S.' relationship with other countries

- Canada came out at the top of the list of countries that are considered friends to the U.S. (96%), along with Australia (92%), the U.K (92%) and France (91%). Respondents also consider it as the most trusted country when it comes to the U.S. working with other countries on a variety of issues (86%).
- The majority of respondents (91%) were more likely to support the United States having a closer trading relationship with another country, if its goods came from closer to the U.S. instead of from far away or overseas, (89%) prefer trading with another country that have the most competitively priced goods followed by 88% who support trading with another country with better environmental standards.
- A vast majority of respondents were more likely to respect another country's different position on an issue if that country shares the same values with the U.S. (87%).

### Understanding the U.S.' position in North America

- When collaborating with its neighbors, nearly two-thirds of respondents preferred a North American or a U.S.-Canada-Mexico approach (34% and 30%, respectively).
- A vast majority of respondents agreed that Canada is an essential partner for the U.S. (86%), ahead of Mexico (70%). Almost three-quarters of respondents also agreed that Canada is the U.S.' best friend and ally (72%).
- Around one in five Americans were familiar with the Canada-U.S.-Mexico Agreement (CUSMA).
- Gun violence (33%) and health care (32%) are considered today's top priority issues, followed by crime (27%) and climate change (27%).

#### **Understanding Americans' attitudes towards Buy America**

- A vast majority of respondents support Buy America (87%), but most were also supportive of expanding Buy America to include Canada (81%).
- Respondents are more likely to support Buy America even if it were opposed by large businesses or industry groups (63%), foreign government (61%). Similarly, support for Buy America is high if it contributed to local job growth but caused job losses in other U.S. regions (54%). On the other hand, it would suffer from low support if it slowed down state government services (28%), cost the state government a lot more money (28%), and if it caused job losses in the local community (17%).

#### **Understanding Americans' attitudes towards Canada**

- A considerable proportion of Americans were not able to say whether things in Canada were headed in the right or wrong direction (42%). However, the same proportion indicated that things were on the right track (41%). Over half (53%) said their opinion of Canada has not changed in the past 5 years, while less than one in five said it has gotten worse (18%), and a little over one in ten said it has improved (13%).
- A relative majority of respondents (42%) preferred to refer to the relationship between Canada and the U.S. as "good neighbors".
- A majority of respondents agreed that Canada is the U.S.' closest global partner on the environment, trade, and border measures (73% agreed with each field), energy (72%), advancing global values (71%), and security and defense (70%).
- Almost three in four respondents agreed that it is appropriate for U.S. lawmakers to consider potential negative impacts on other countries (73%) and Canada (71%) when making decisions.
- Around three in four also agreed that it is appropriate for Canada to prioritize its own needs (76%), but that the two countries should still make special allowances for each other (73%).
- At least eight in ten Americans agreed with every statement regarding the need for collaboration between Canada and the U.S. in various fields.

#### **Understanding Americans' attitudes towards Canada-U.S. collaboration**

- A majority of respondents would support periodical tariffs on imports from Canada if they supported local jobs (79%), but less than half would support them if they resulted in tariffs on exported American goods (41%), and only one in five people would support them if they resulted in local job losses (20%) or caused a trade war with Canada (18%).

- The majority of respondents are opposed to imposing tariffs on imports of certain kinds of Canadian lumber, if they contribute to higher housing costs for American homebuyers (77%) and if they add a tax on American businesses and consumers (74%). Similarly, just over half of respondents are opposed to imposing tariffs on certain kinds of Canadian lumber, if the US cannot produce enough lumber at home to meet its own demand (56%).
- Collaboration between the U.S. and Canada is seen as important in all areas of defense: maintaining continental (86%) and border (85%) security, defending North America (85%), promoting world peace and stability (84%), and maintaining U.S. national security (83%).
- A majority of respondents also agreed that the two countries need to closely coordinate their responses to global challenges presented by countries such as China, Russia, and Iran (85%), that Canada contributes sufficiently in the NORAD (80%), and in defending the Arctic (78%).
- Regarding the management of their shared border, both Canada and the U.S. got similar ratings: around seven in ten considered that Canada's (72%) and the U.S.' (69%) management of the border contributes to the U.S. economy, and between a fifth and a third of respondents had a negative perception of the countries' management of the border.
- A vast majority of respondents agreed that Canada develops its natural resources more responsibly than other countries (84%).
- As far as energy is concerned, a majority of respondents would support importing more energy from Canada, if it supported new jobs (87%), increased U.S. national security (85%), meant reducing imports from other countries like Saudi Arabia or Russia (82%), and even if it required new infrastructure (75%). A little less than half would support more energy imports from Canada, if it produced more greenhouse gas emissions (48%).
- Terminology-wise, terms like "energy infrastructure" and "energy imports" were preferred to "pipelines" and "oil and gas imports" as they had less of a negative connotation. 84% and 83% of respondents stated they would support building more energy infrastructure between the two countries and increasing energy imports from Canada.
- Seven in ten agreed that the U.S. could learn from Canada with respect to working with racialized communities (70%).

#### **MaxDiff analyses – argument and message evaluation**

- Two MaxDiff analyses were conducted to respond to different objectives. The first one was aimed at determining the key arguments that resonate with U.S. citizens regarding collaboration between the United States and Canada. Four out of the six arguments obtained fairly similar scores: defence cooperation (23), jobs (21), climate change (20), and energy (19). Diversity and inclusion were twice (11) less important than defence, and unique product supplies (6) scored the lowest.
- The second MaxDiff analysis helped determine the importance of several messages pertaining to U.S.-Canada collaboration and conflict resolution. The top argument was *“Canada firmly believes that a mutually acceptable agreement - one that brings stability and predictability to the sector - is in the best interests of both countries and remains the best outcome to the dispute”* with an

importance score of 37, four times more important than the last argument *“If we continue down this road, Canada will have no choice but to retaliate against the United States”* with a score of 9.

## **Notes on Interpretation of the Research Findings**

The views and observations expressed in this document do not reflect those of Global Affairs Canada. This report was compiled by Leger based on the research conducted specifically for this project.

Funded and operated by NORC at the University of Chicago, AmeriSpeak® is a probability-based panel designed to be representative of the U.S. household population. Randomly selected U.S. households are sampled using area probability and address-based sampling, with a known, non-zero probability of selection from the NORC National Sample Frame. While the AmeriSpeak® panel is meant to be representative of the U.S. population, it is not probabilistic; the results cannot be inferred to the general population of the United States.

Respondents were randomly selected from the NORC probability panel ensuring that the sample closely resembles the actual population of the United States. The margins of sampling error cannot be calculated for surveys using internet panel. Respondents for this survey were selected from among those who have volunteered to participate/registered to participate in online surveys. The data have been weighted to reflect the demographic composition of the target population. Detailed information about the weighting process is presented in annex A.1.

In this report, all results are expressed as percentages unless otherwise noted. Percentages may not always add up to 100% due to rounding or multiple mentions. The mention “Skipped” in graphs refers to the proportion of respondents who skipped the question on the survey.

Subgroup differences are reported when they are statistically significant at the 95% confidence level. When a subgroup is reported as being more or less likely to have given a particular response, this means the result for the subgroup was significantly different compared with the combined result for all other subgroups combined. For example, if respondents aged 18 to 24 were more likely to give a particular response, it is in comparison to the result for all other respondents aged 25 and older. These significant differences are presented in bullet points under the global results. States were grouped into four categories (Midwest, West, Northeast and South) according to the U.S. Census Bureau. Further details are provided in the appendix.

## **Contract value**

The contract value for this study was \$144,065.96 (including HST)

## **Political Neutrality Statement and Contact Information**

Leger certifies that the final deliverables fully comply with the Government of Canada’s political neutrality requirements outlined in the Policy on Communications and Federal Identity and the Directive on the Management of Communications.

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

A handwritten signature in blue ink, appearing to read "Christian Bourque".

Signed:

Christian Bourque, Senior Researcher

Léger