

# Canadian Attitudes on Free Trade with the U.S.

Public Opinion Research  
Field Dates: November 22<sup>nd</sup> to December 3<sup>rd</sup>, 2024

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# Survey Methodology



**These are the results of an online survey conducted between November 22nd to December 3rd, 2024.**

**Method:** This online survey was conducted using INNOVATIVE's Canada 20/20 national research panel with additional respondents from Lucid, a leading provider of online samples. Each survey is administered to a series of randomly selected samples from the panel and weighted to ensure that the overall sample's composition reflects that of the actual Canadian population according to Census data to provide results that are intended to approximate a probability sample.

**Sample Size:** n=2,390 Canadian citizens, 18 years or older. The results are nationally weighted to n=1,000 based on Census data from Statistics Canada.

**Field Dates:** November 22nd to December 3rd, 2024.

**Weighting:** Results for Canada are weighted by age, gender, region, education, and self-reported federal past vote to ensure that the overall sample's composition reflects that of the actual population according to Census data, in order to provide results that are intended to approximate a probability sample. Weighted and unweighted frequencies are reported in the table.

**Margin of Error:** This is a representative sample. However, since the online survey was not a random probability-based sample, a margin of error cannot be calculated. Statements about margins of sampling error or population estimates do not apply to most online panels.

**Note:** Graphs may not always total 100% due to rounding values rather than any error in data. Sums are added before rounding numbers.

	Unweighted (n)	Unweighted (%)	Weighted (n)	Weighted (%)
<b>Men 18-34</b>	255	10.7%	133	13.3%
<b>Men 35-54</b>	364	15.2%	158	15.8%
<b>Men 55+</b>	537	22.5%	195	19.5%
<b>Women 18-34</b>	268	11.2%	131	13.1%
<b>Women 35-54</b>	422	17.7%	166	16.6%
<b>Women 55+</b>	537	22.5%	213	21.3%
<b>Region</b>				
<b>BC</b>	442	18.5%	140	14.0%
<b>AB</b>	402	16.8%	112	11.2%
<b>Prairies</b>	111	4.6%	64	6.4%
<b>ON</b>	783	32.8%	386	38.6%
<b>QC</b>	505	21.1%	230	23.0%
<b>Atlantic</b>	147	6.2%	67	6.7%

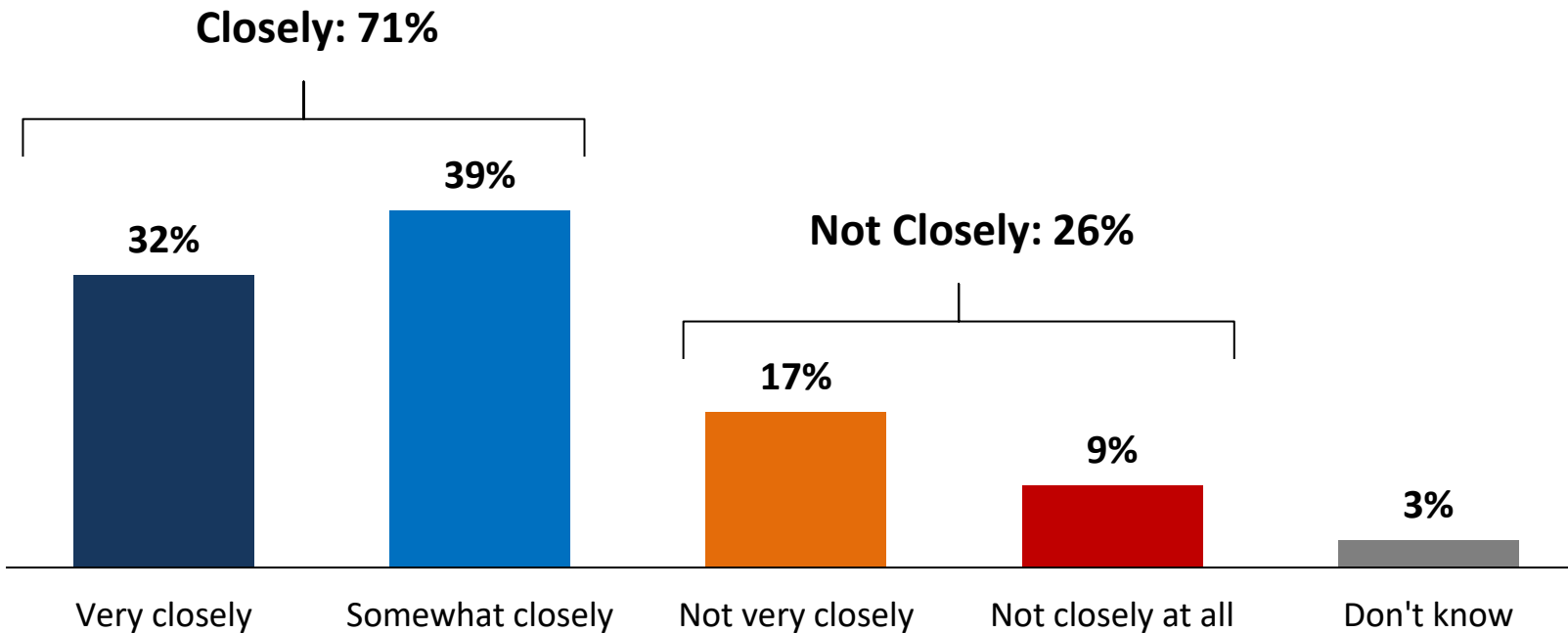
# Trump Attitudes

# Engagement with US Election Results: Nearly 3-in-4 (71%) of Canadians followed the U.S. elections closely



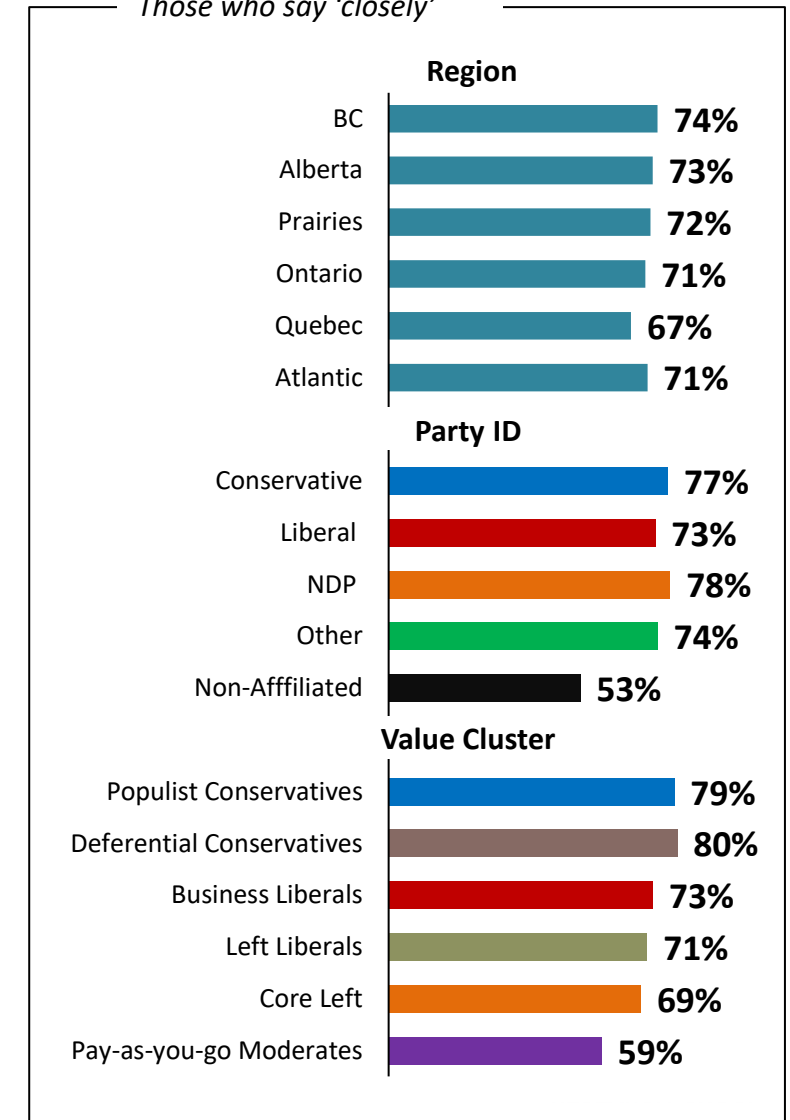
How closely did you follow the news about Donald J. Trump winning the 2024 US presidential election?

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'closely'

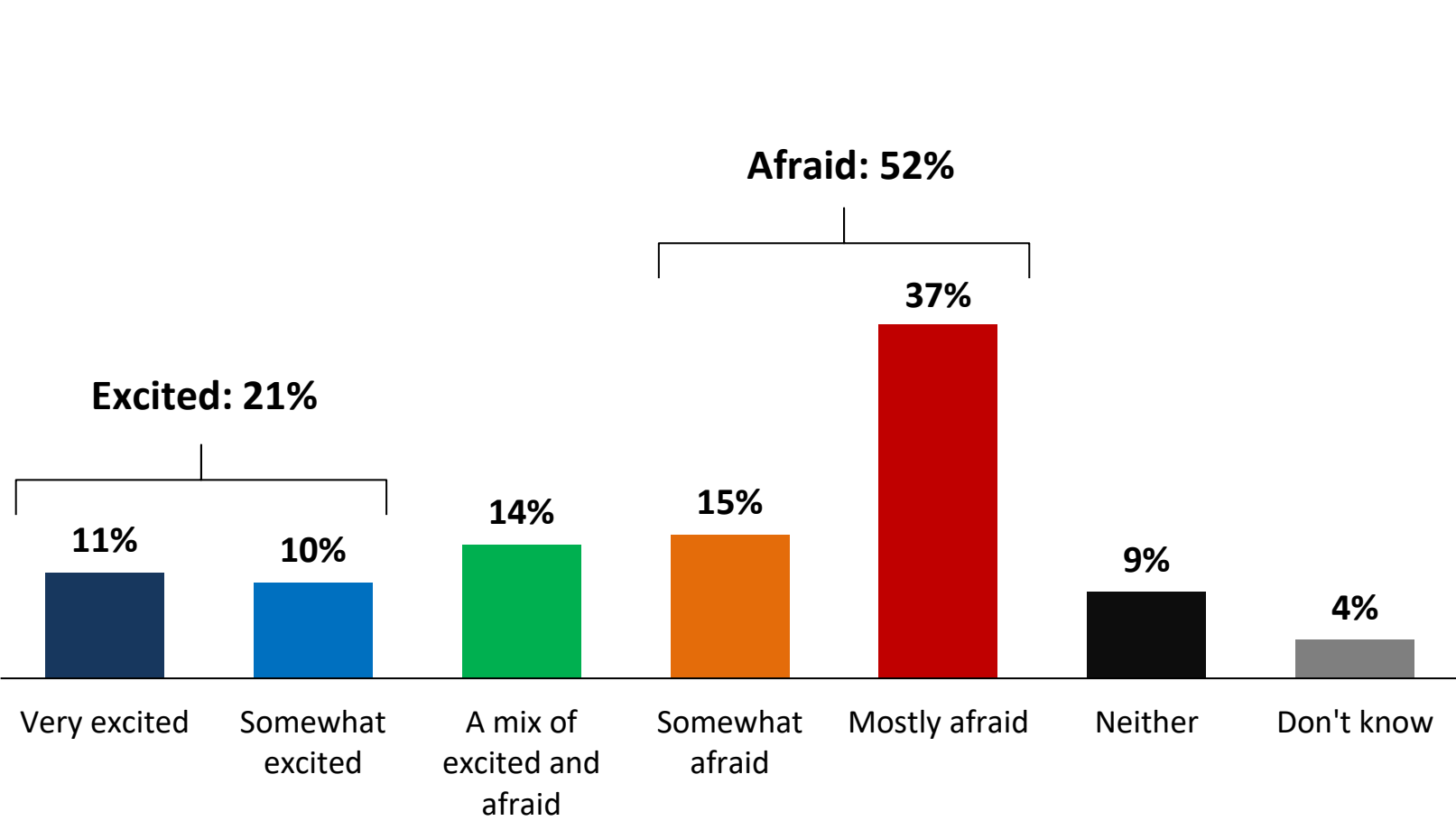


# Attitude Towards President-Elect Trump: Over half (52%) say Trump's election as the president left them feeling afraid; Conservatives less so



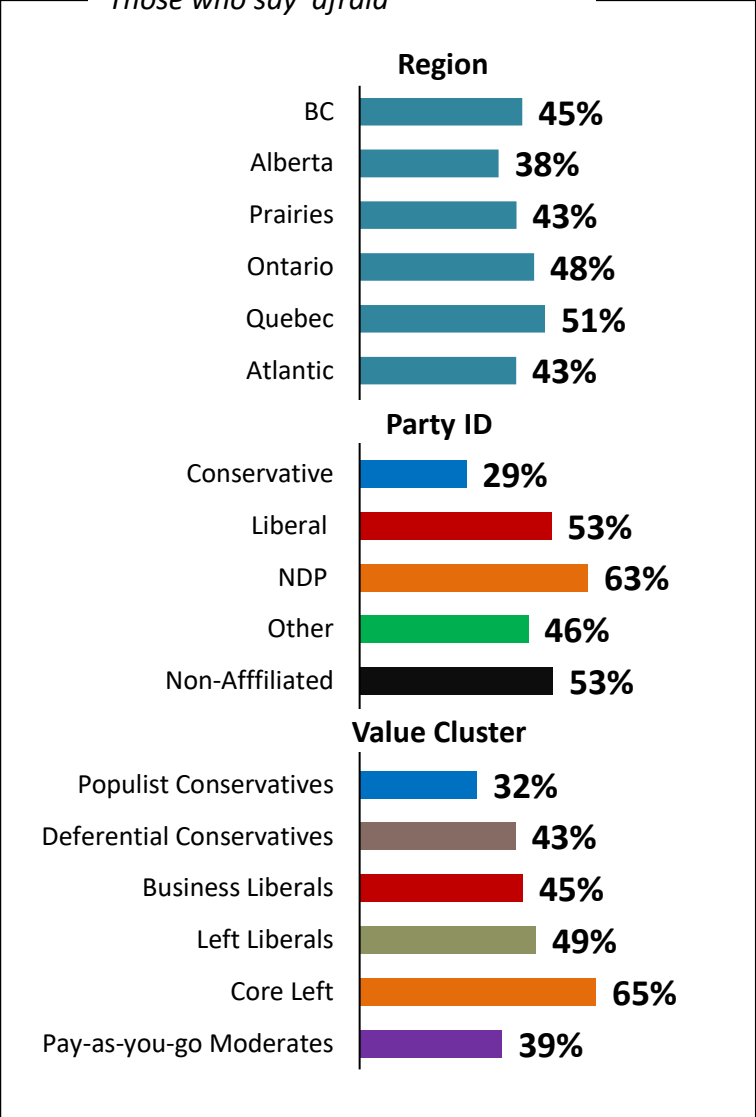
Does Donald J. Trump's election as the US President leave you feeling excited or afraid?

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'afraid'



# Best Leader for Canada-US Relations: Across most segmentation, more say Poilievre is more equipped in handling Canada-US relations

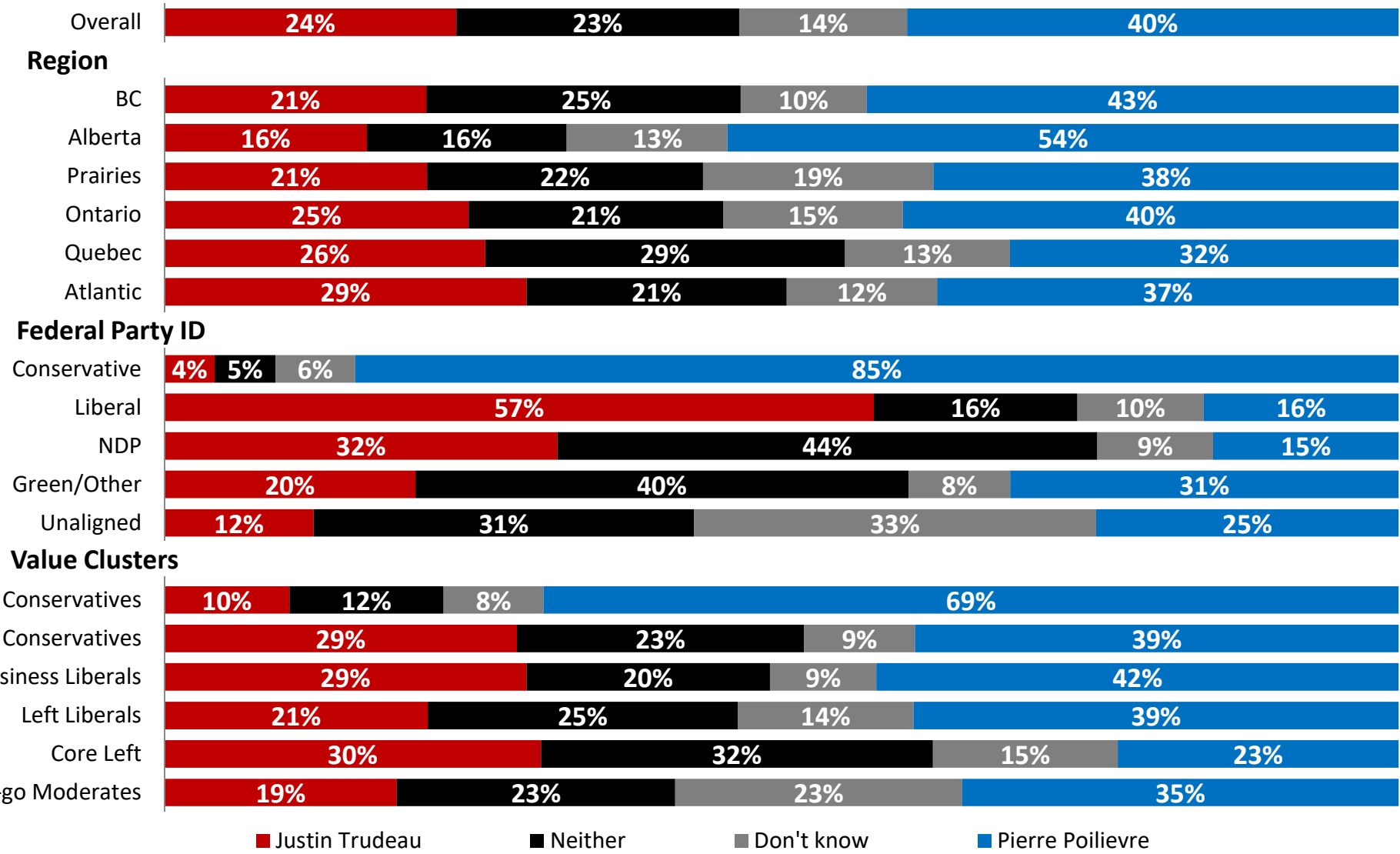
Which of the following leaders do you believe is more equipped to handle Canada-US relations during Trump's renewed presidency? BY Segmentation



Justin Trudeau



Pierre Poilievre



■ Justin Trudeau ■ Neither ■ Don't know ■ Pierre Poilievre

# Best Leader for Canada-US Relations: Those who are excited prefer Poilievre but those afraid prefer Trudeau

Which of the following leaders do you believe is more equipped to handle Canada-US relations during Trump's renewed presidency? BY Attitude Towards Trump

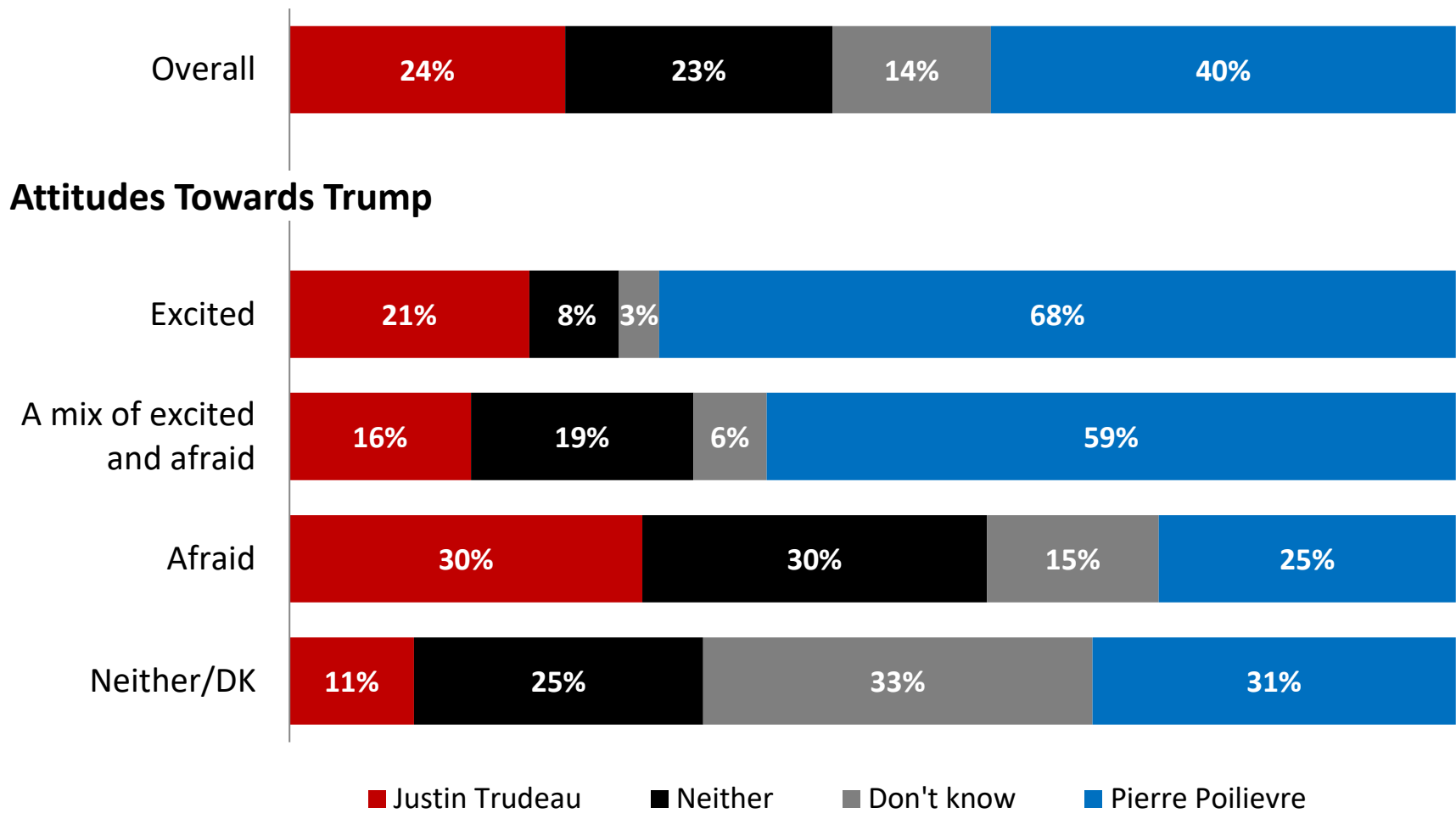


Justin Trudeau



Pierre Poilievre

## Attitudes Towards Trump



■ Justin Trudeau ■ Neither ■ Don't know ■ Pierre Poilievre

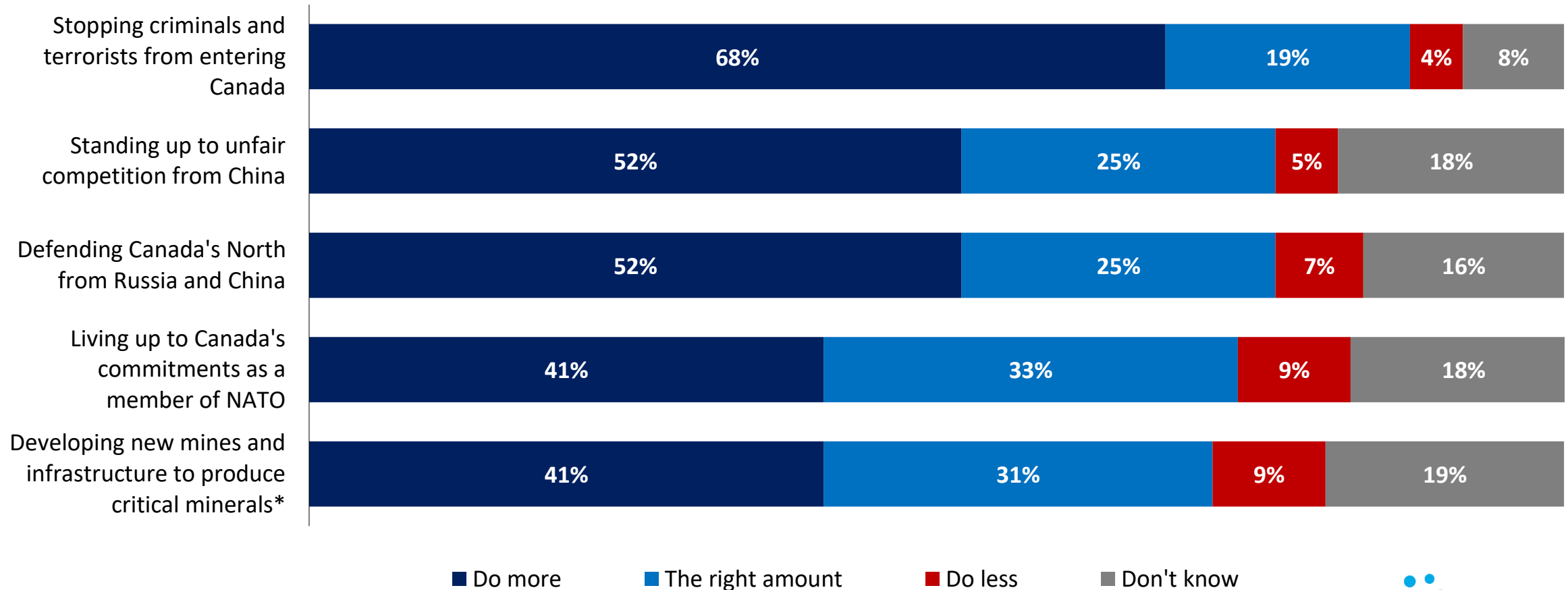


# Issues

# Efforts on Issues: A majority (68%) of Canadians say we need to 'do more' to stopping criminals and terrorists from entering Canada

Now, we have a few questions about the recent US presidential election.

Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues.



\*Note: Question text has been truncated to provide a description; full question text is "Developing new mines and infrastructure to produce critical minerals needed for high tech and the energy transition"

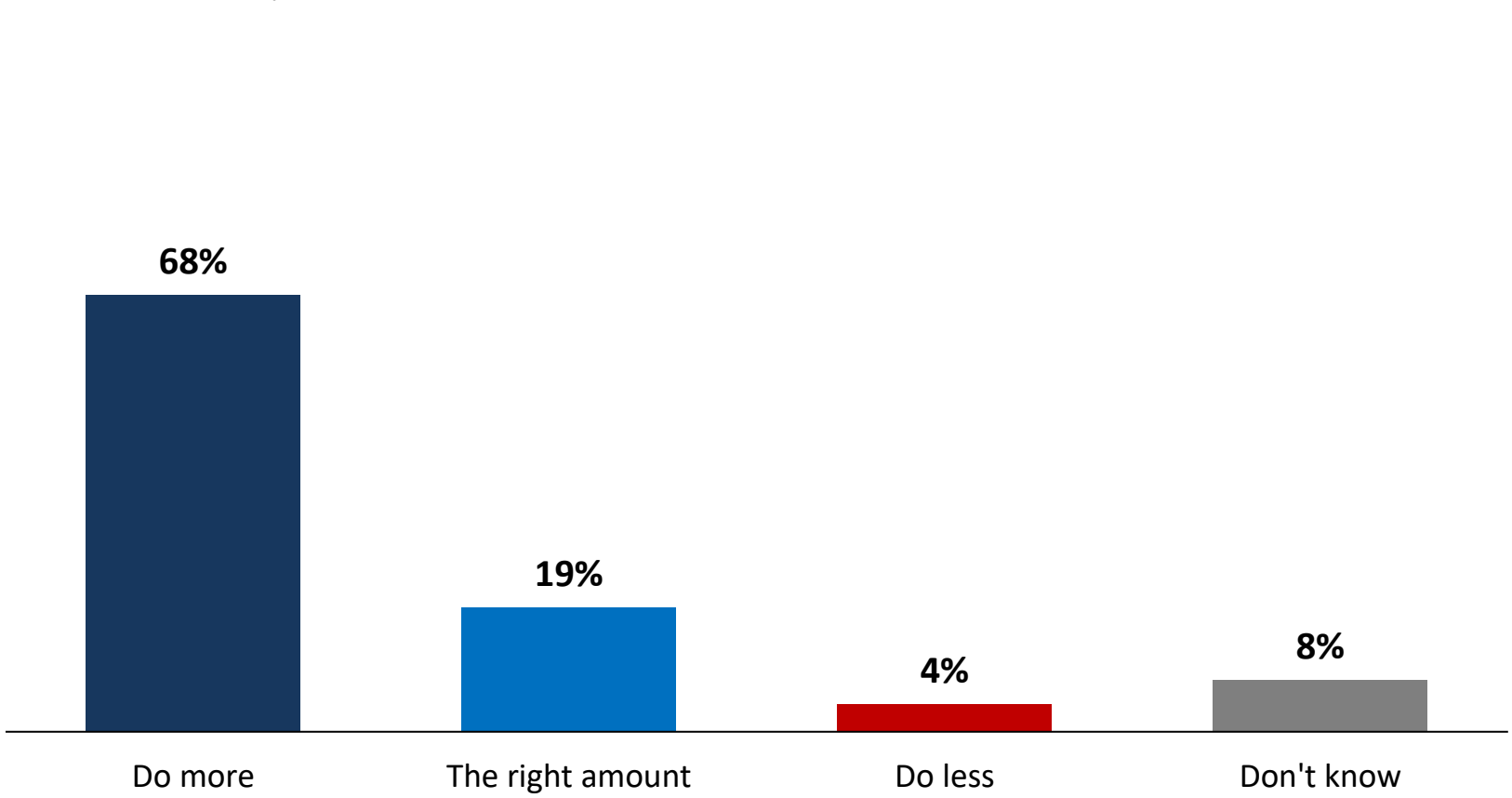
# Stopping Criminals/Terrorists from Entering: Over 2-in-3 (68%) say we need to do more; highest among Conservatives



Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues:

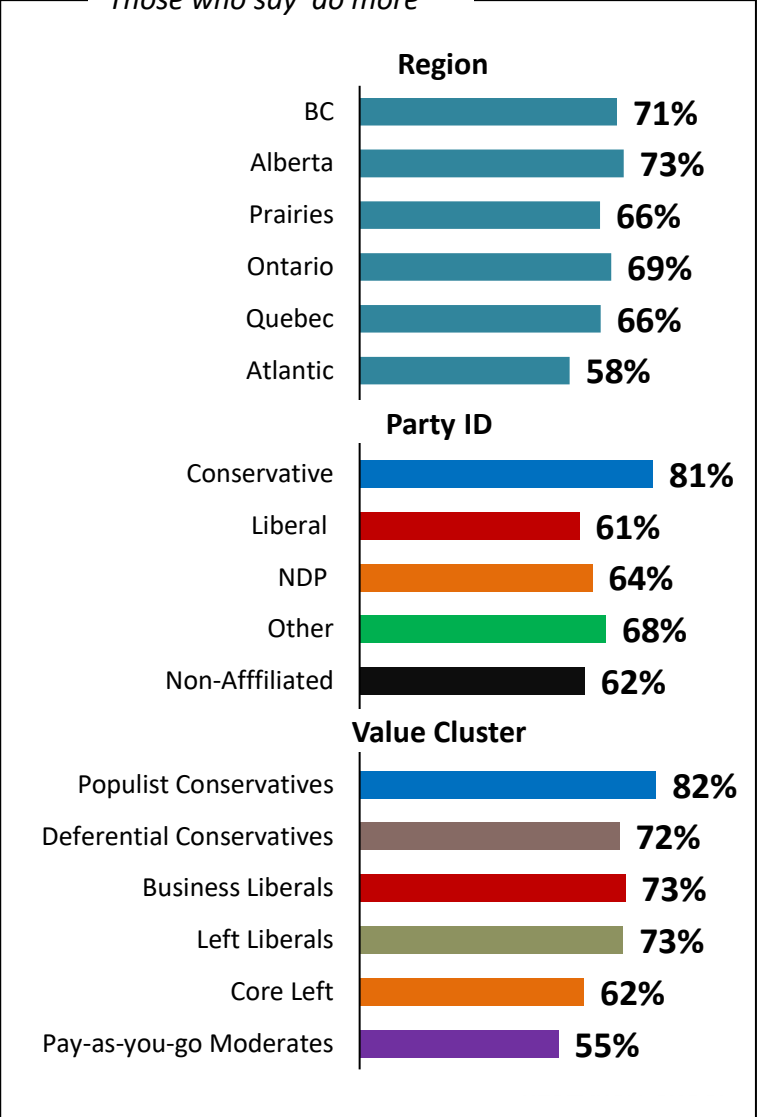
## Stopping criminals and terrorists from entering Canada

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'do more'



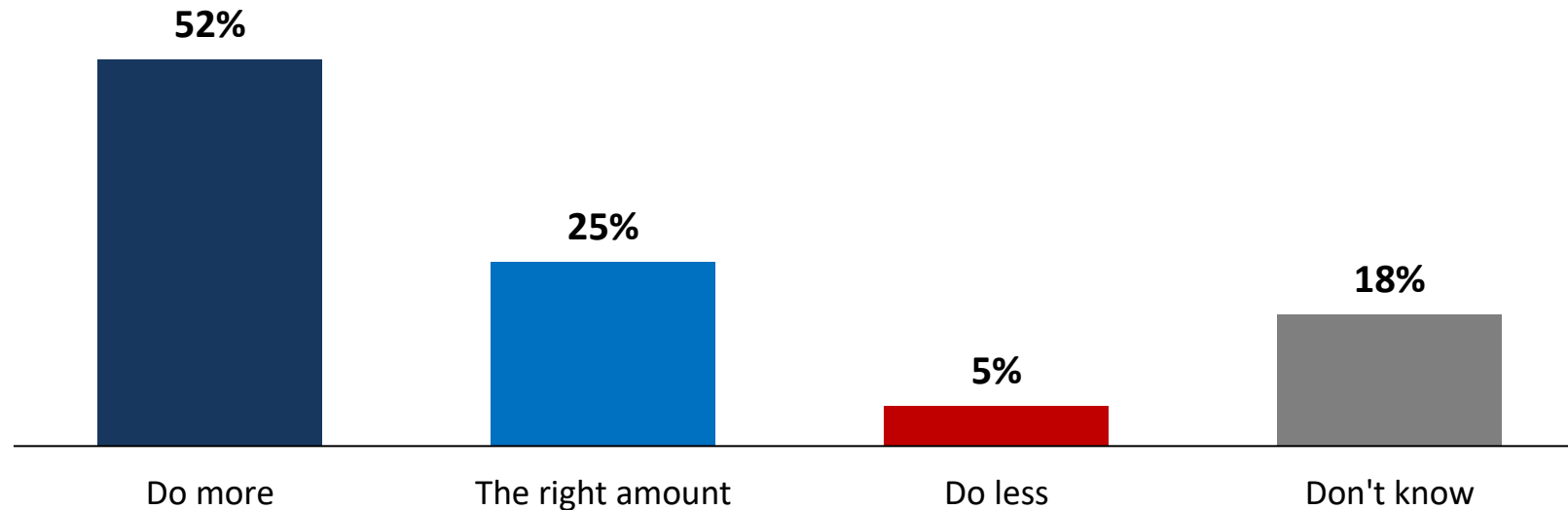
# Unfair Competition: Over half (52%) of Canadians say we need to do more in standing up to unfair competition from China



Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues:

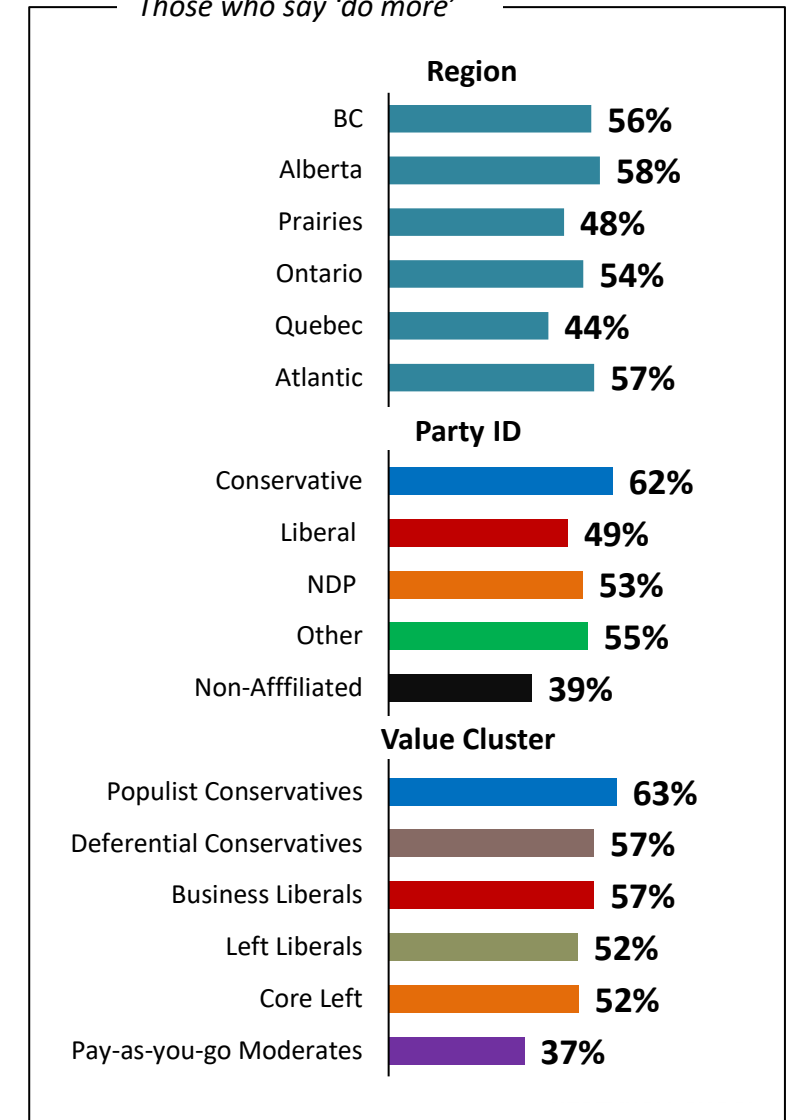
## Standing up to unfair competition from China

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'do more'



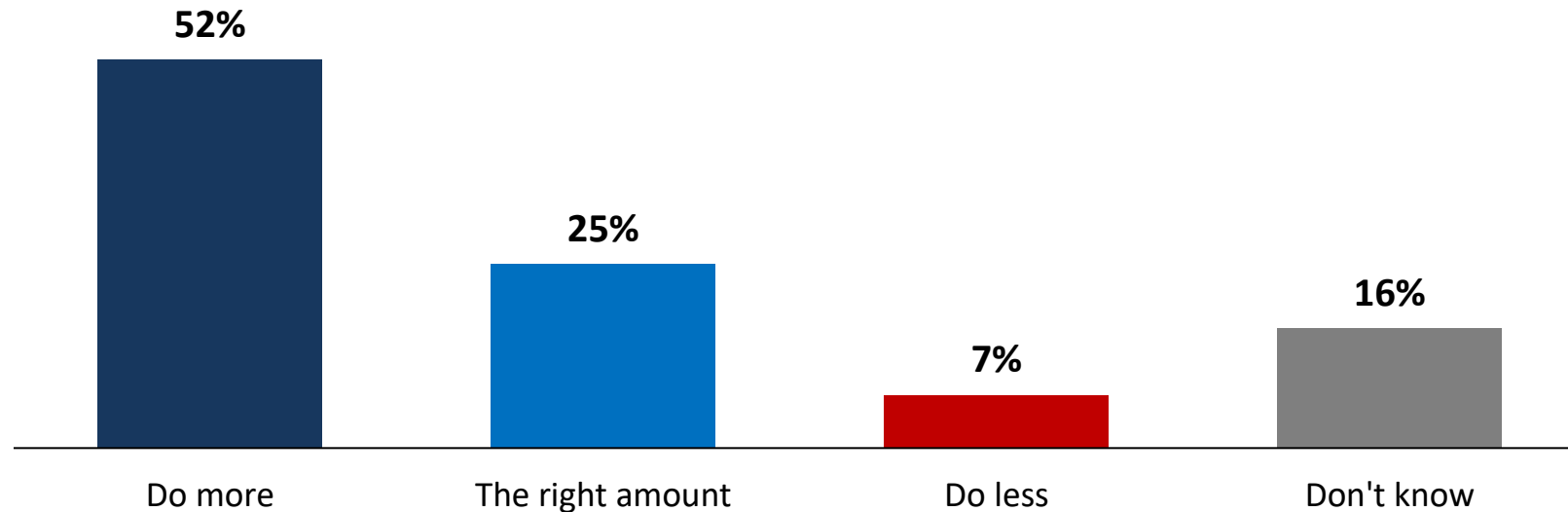
# Defending Canada: Compared to other regions, the Atlantic are more likely to say we need to do more to defend Canada's North



Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues:

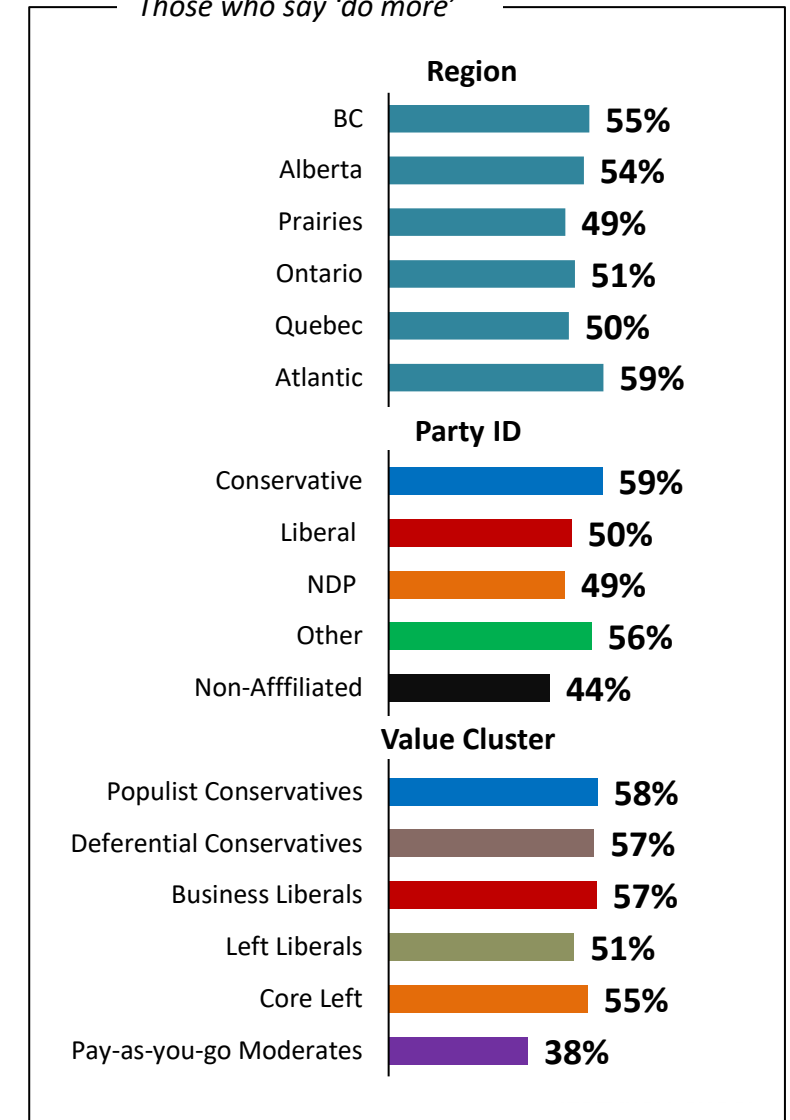
## Defending Canada's North from Russia and China

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'do more'



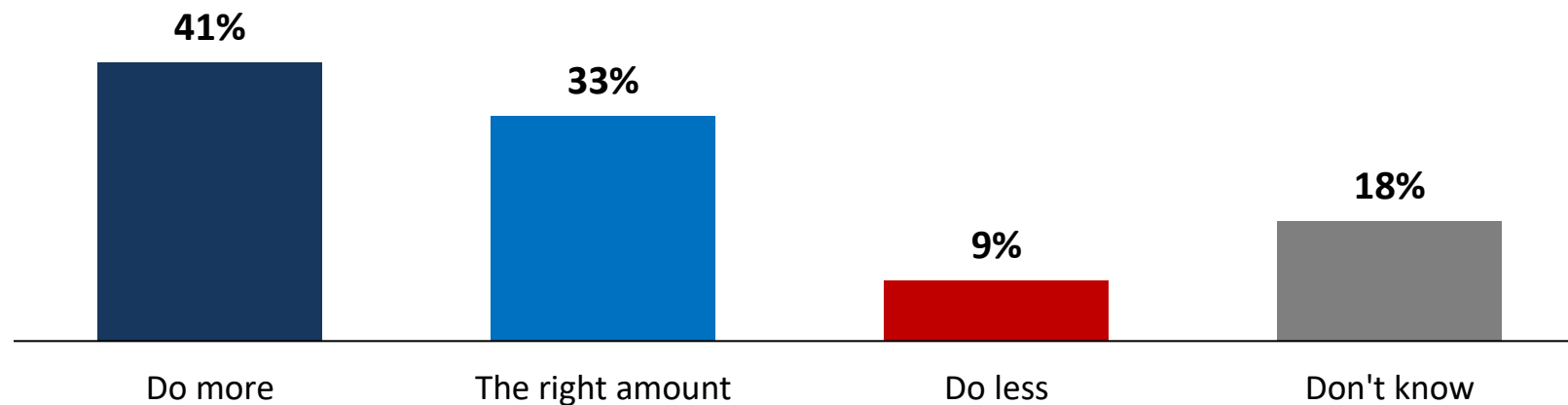
# Commitments to NATO: Compared to other regions, Atlantic are more likely to say we need to do more on Canada's commitment to NATO



Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues:

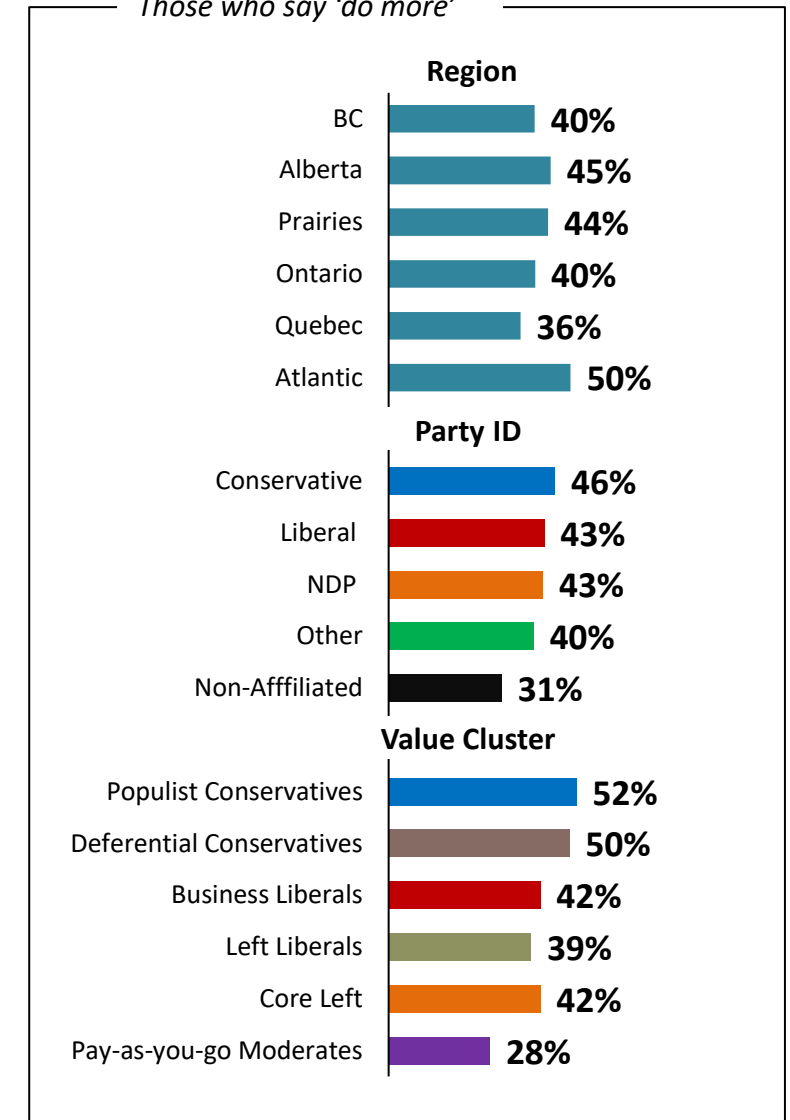
## Living up to Canada's commitments as a member of NATO

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'do more'



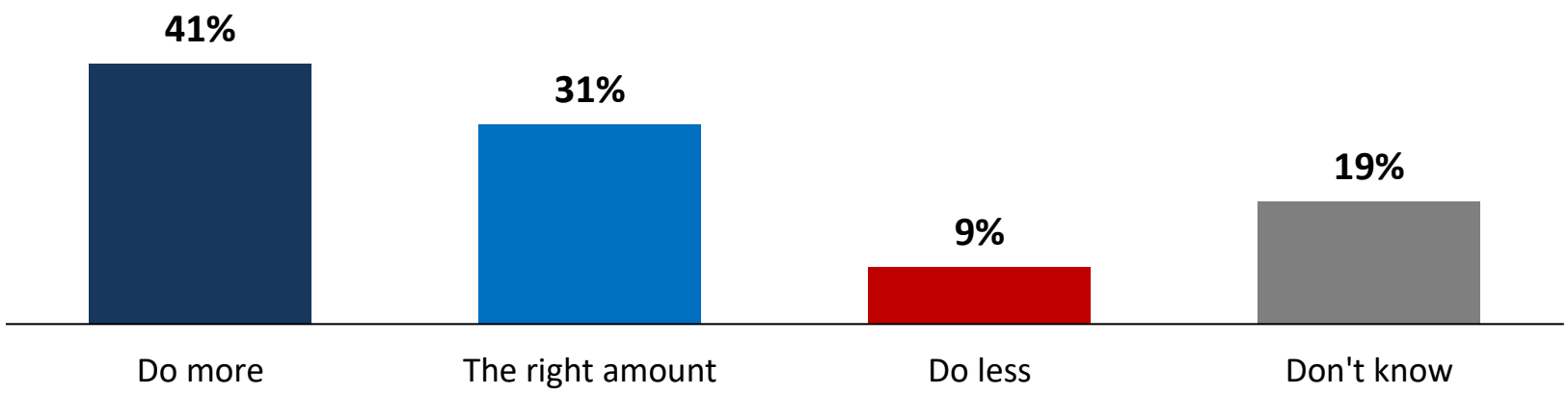
# Mines and Infrastructure: Conservatives are more likely to say we need<sup>15</sup> to develop new mines and infrastructure



Please indicate whether you feel Canada needs to do more, do less, or whether Canada is making about the right amount of effort now regarding each of the following issues:

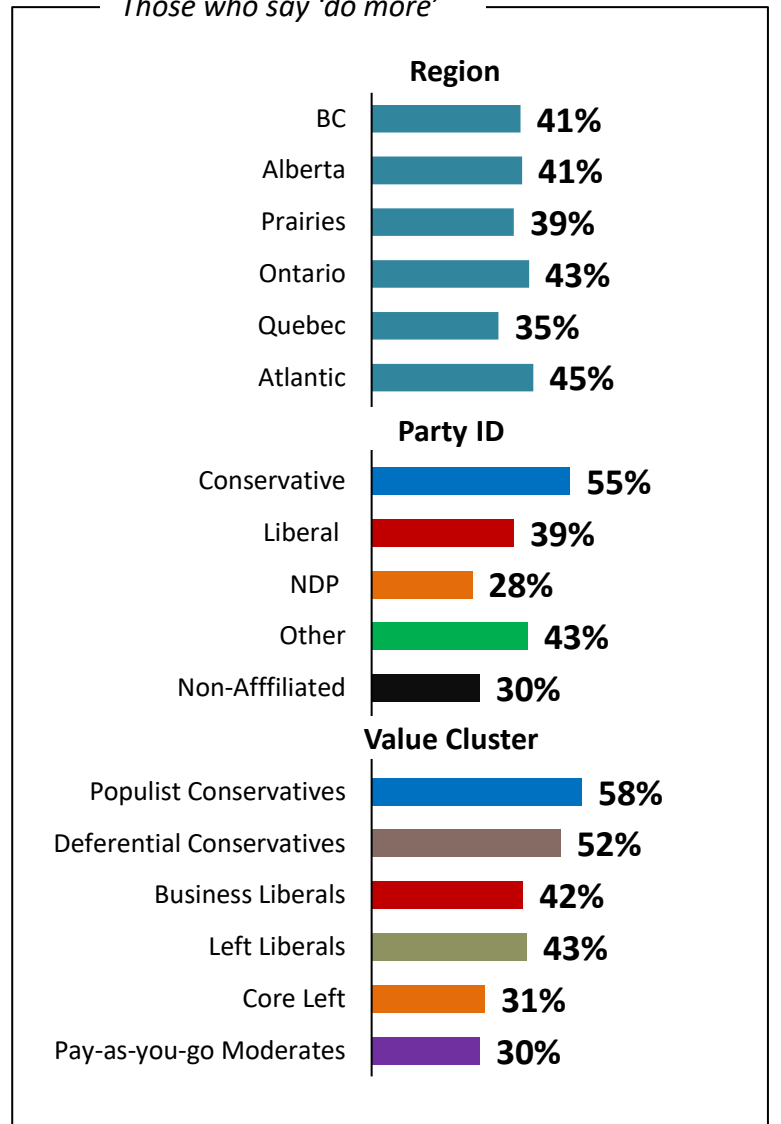
## Developing new mines and infrastructure to produce critical minerals needed for high tech and the energy transition

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'do more'



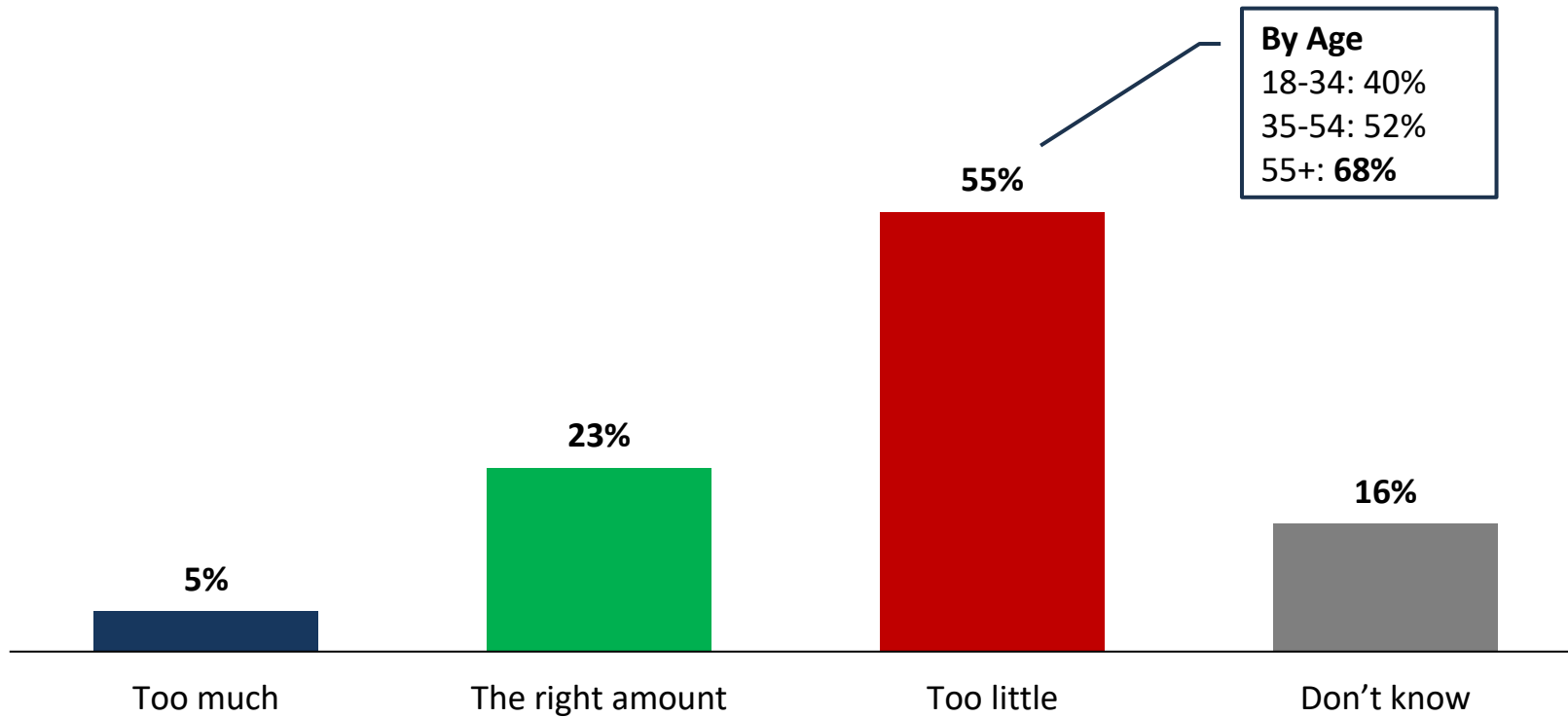
# Illegal Border Crossings: More than half of Canadians believe efforts to prepare for potential increases in illegal border crossings are inadequate



Donald Trump has promised to deport millions of people who immigrated to the US illegally. Many experts fear that this may result in a large increased of illegal border crossings into Canada by immigrants in the US who fear deportation.

Do you feel the Canadian federal government is doing too much, too little or the right amount to prepare for an increase in illegal border crossings from the US to Canada?

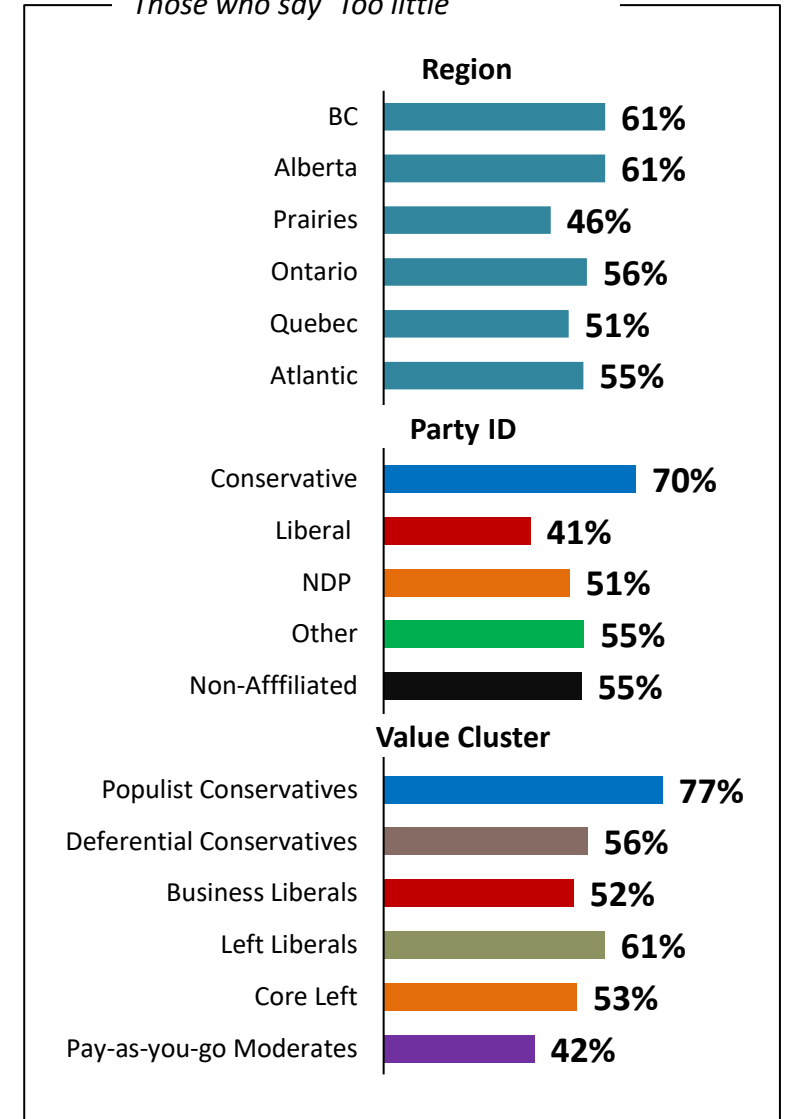
[asked of all respondents; n=1,000]



**By Age**  
 18-34: 40%  
 35-54: 52%  
 55+: 68%

## Segmentation

Those who say 'Too little'





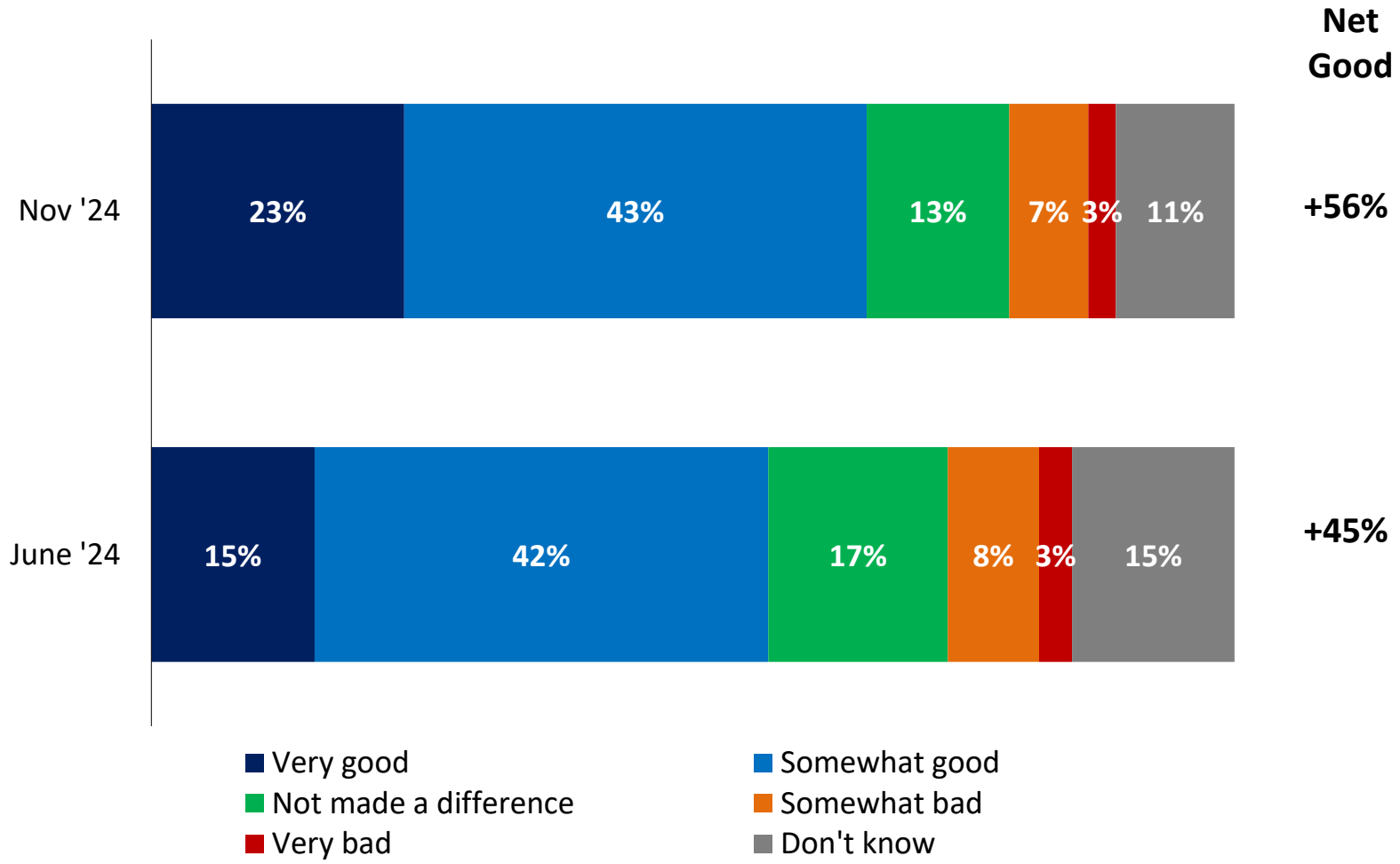
# Free Trade Agreement

# Free Trade Agreement: Since June, more Canadians think free trade with the U.S. is a good thing



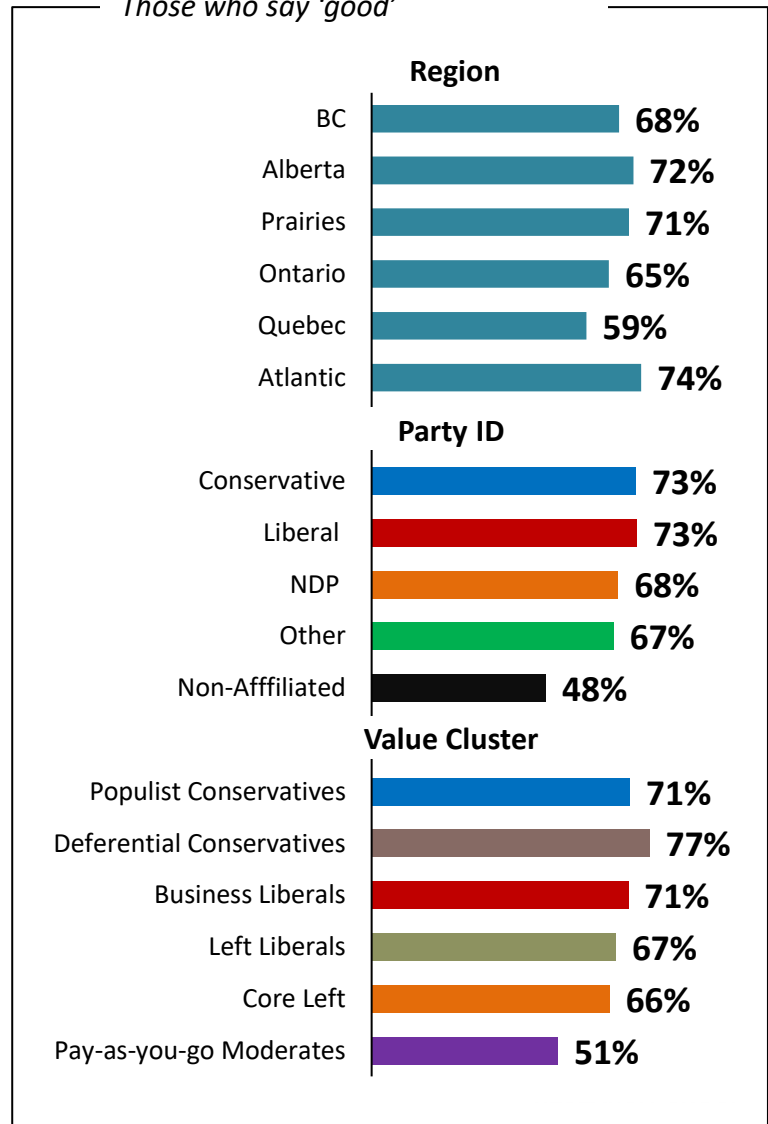
Canada currently has a free trade agreement with the United States. Do you think free trade with the United States has generally been a good thing for Canada or a bad thing for Canada?

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'good'



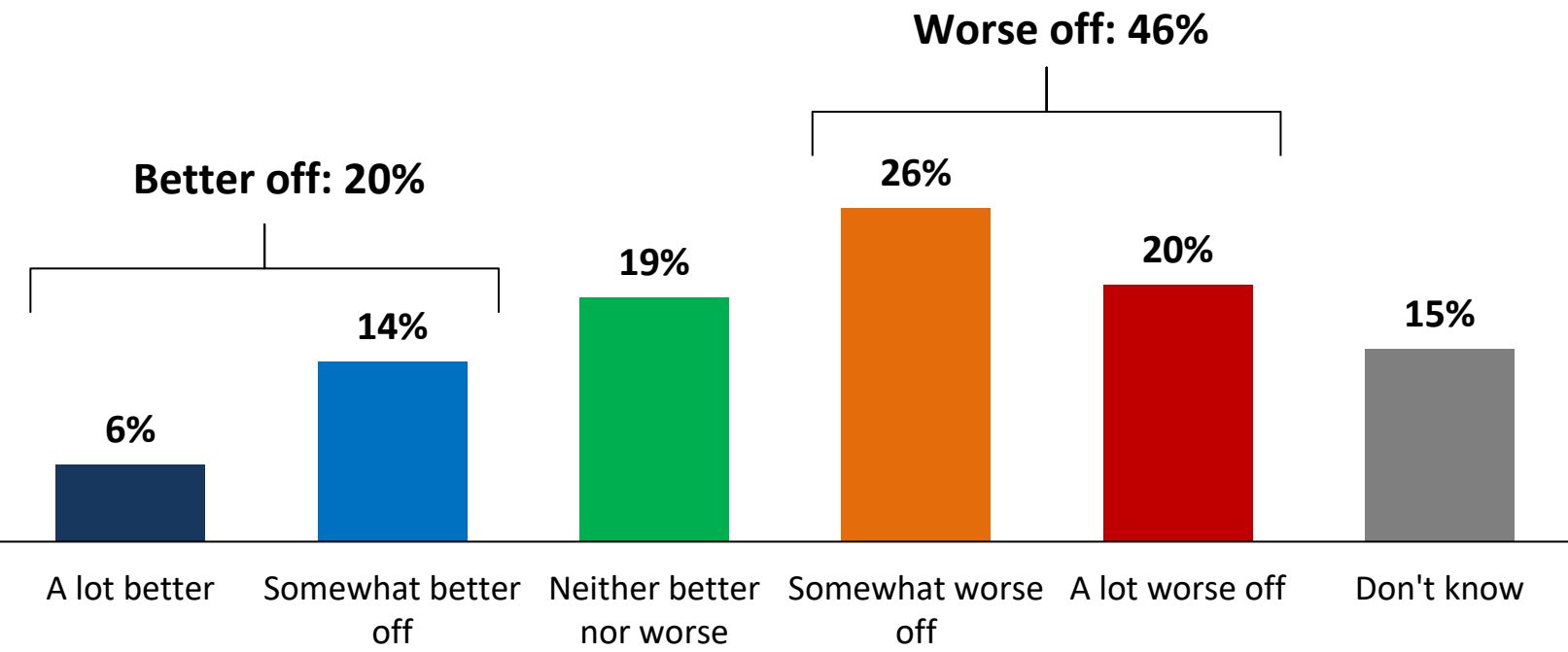
# Re-negotiating the Free Trade Agreement: Nearly half (46%) think re-negotiating the free trade agreement will leave Canada worse off



Canada's current free trade agreement with the US also includes Mexico. It is expected the new Trump administration will seek to renegotiate this agreement in 2026 when the agreement provides for a review.

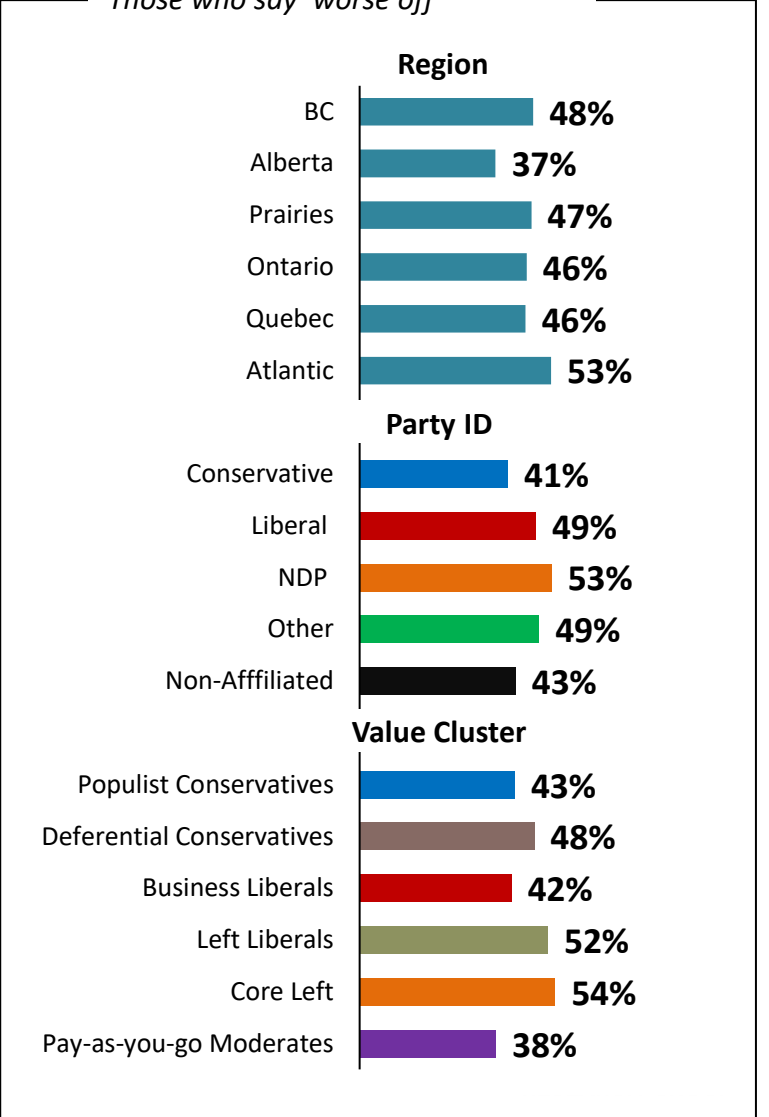
If the new American administration led by Donald Trump re-opens the current free trade agreement, do you think Canada will be better off or worse off than it is now?

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'worse off'



# Tariffs: An overwhelming majority (76%) of Canadians are concerned about the possibility of increased tariffs on goods exported to the U.S.

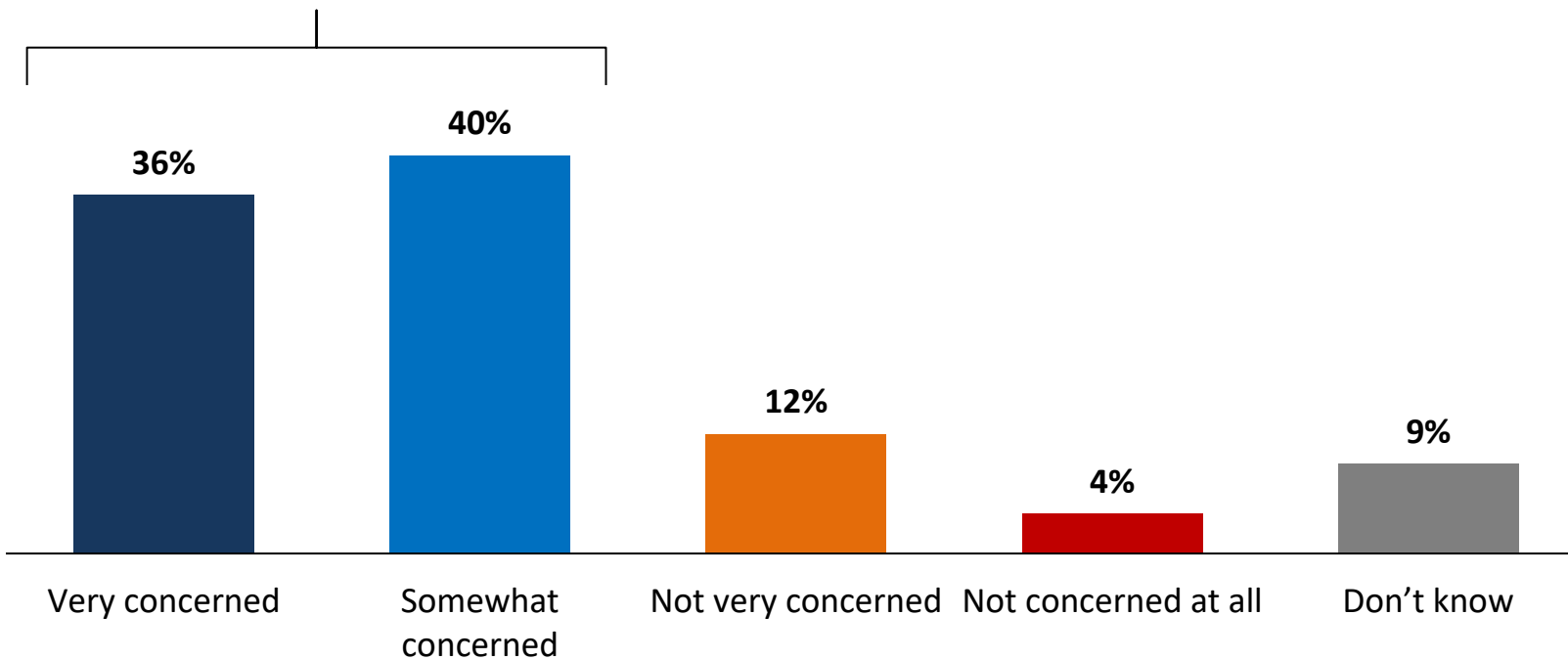


During this election campaign, Trump has indicated he would consider pursuing trade policies that include the imposition of tariffs on foreign imports. This could potentially lead to higher tariffs on Canadian exports to the US.

How concerned are you about the potential for increased tariffs on Canadian goods exported to the US?

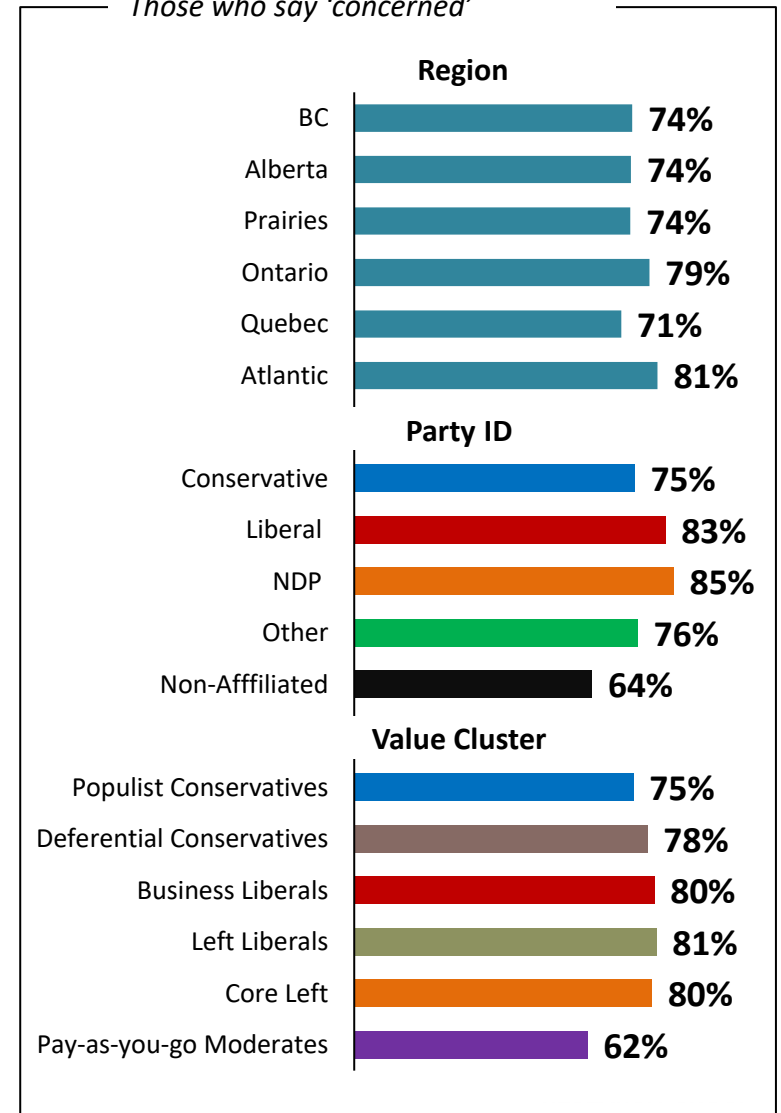
[asked of all respondents; n=1,000]

**Concerned: 76%**



## Segmentation

*Those who say 'concerned'*



# New Free Trade Agreement Items

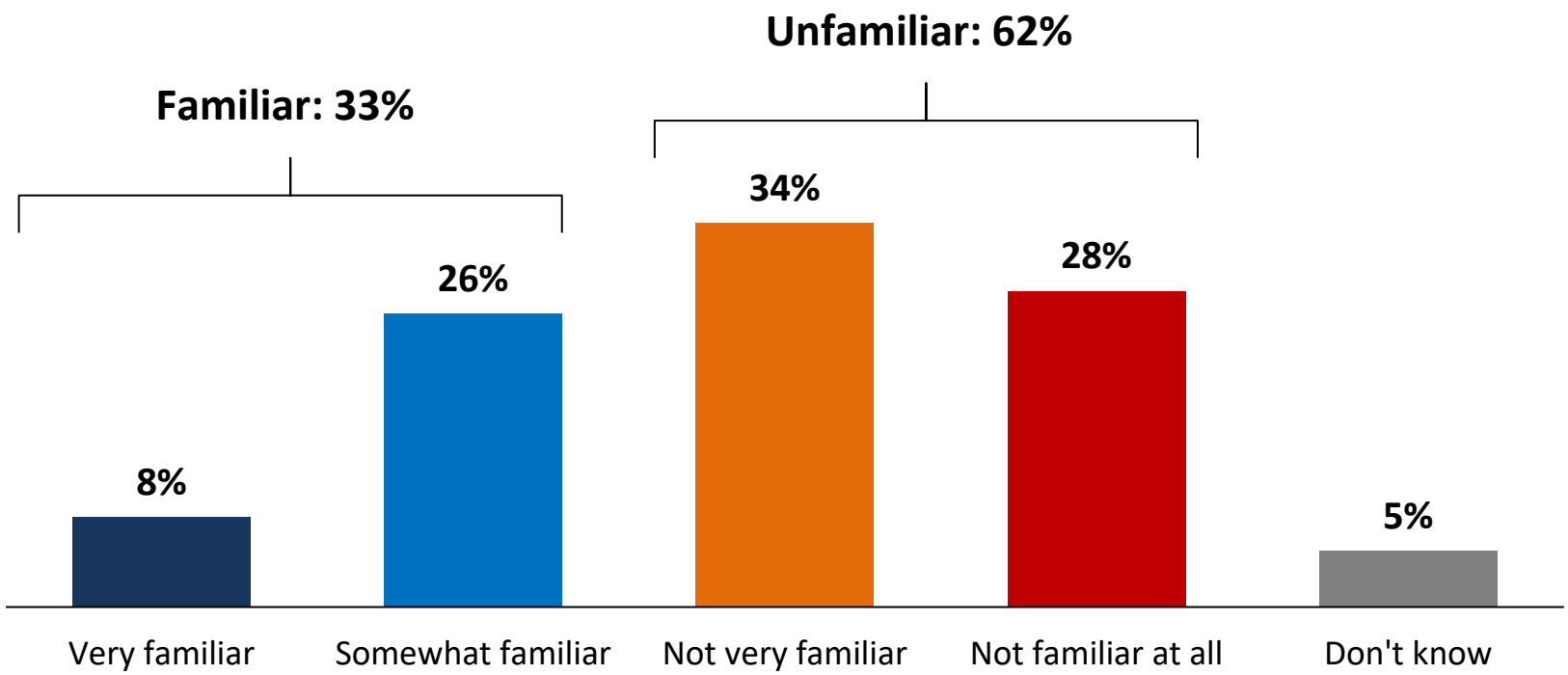
# Familiarity with Supply Management: Only one third of Canadians are familiar with supply management



Supply management is a system that allows specific farming sectors (such as dairy, poultry and eggs) to limit the supply of their products to what Canadians are expected to consume in order to ensure predictable, stable prices. Supporters say this is a good way to protect family farms. Opponents say this forces consumers to pay more than is necessary for groceries.

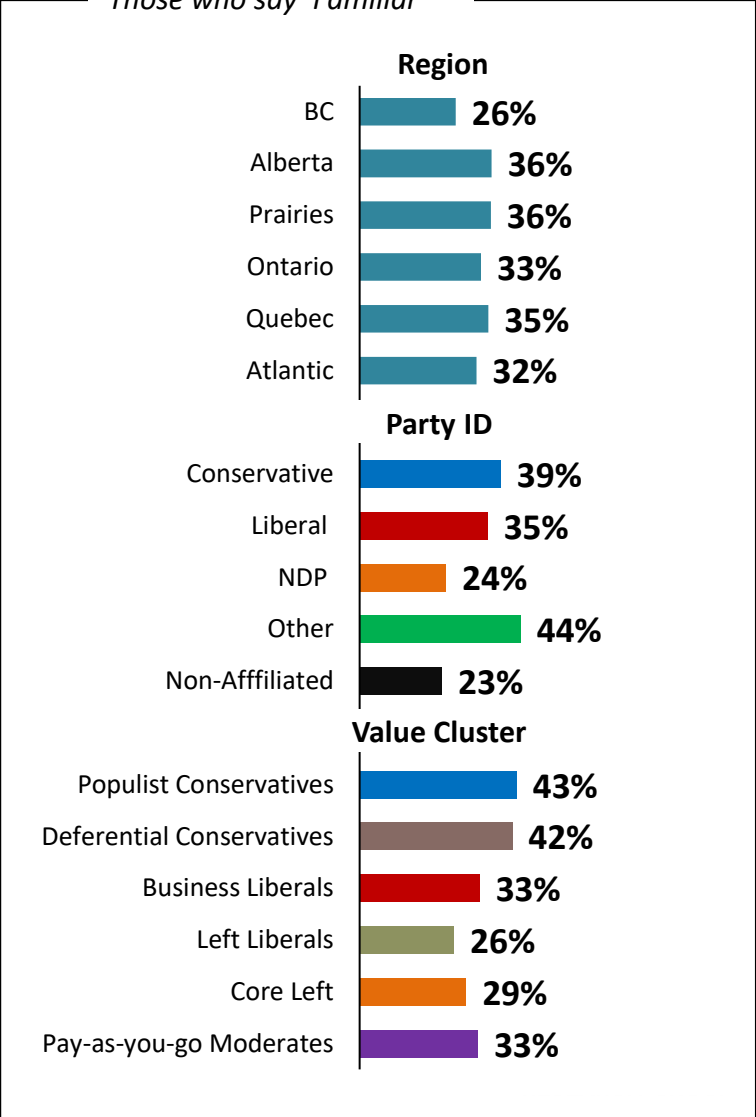
How familiar are you with Canada's supply management system?

[asked of all respondents; n=1,000]



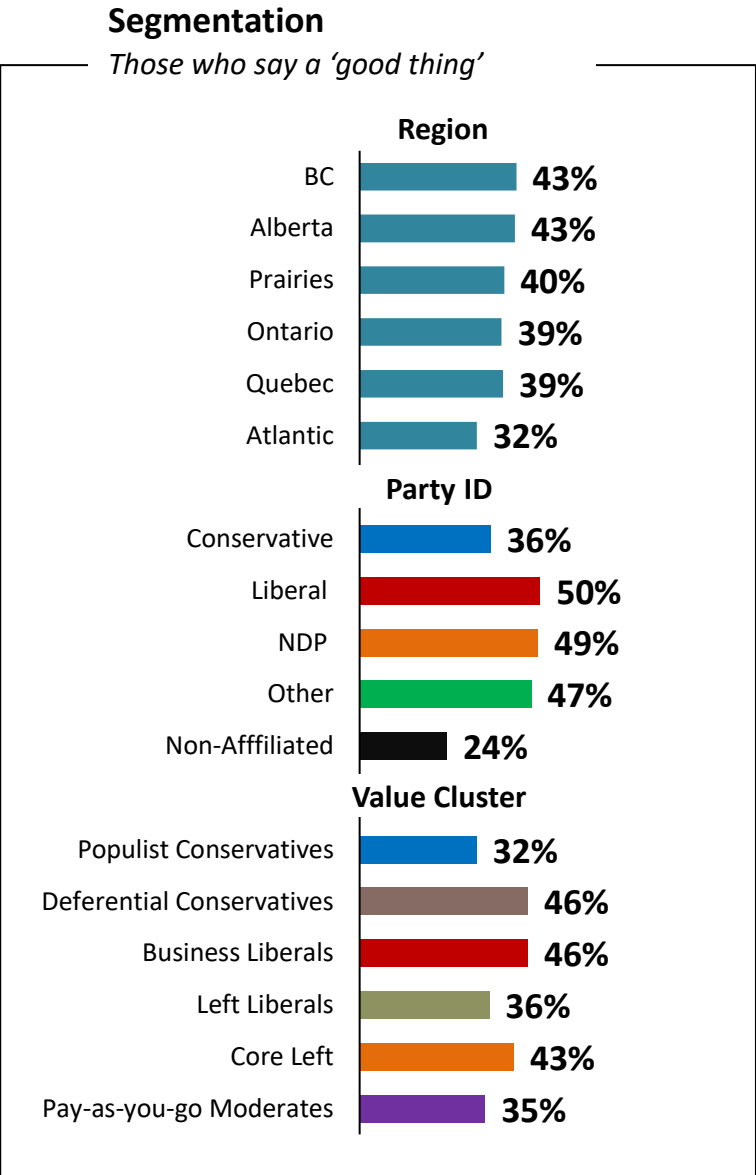
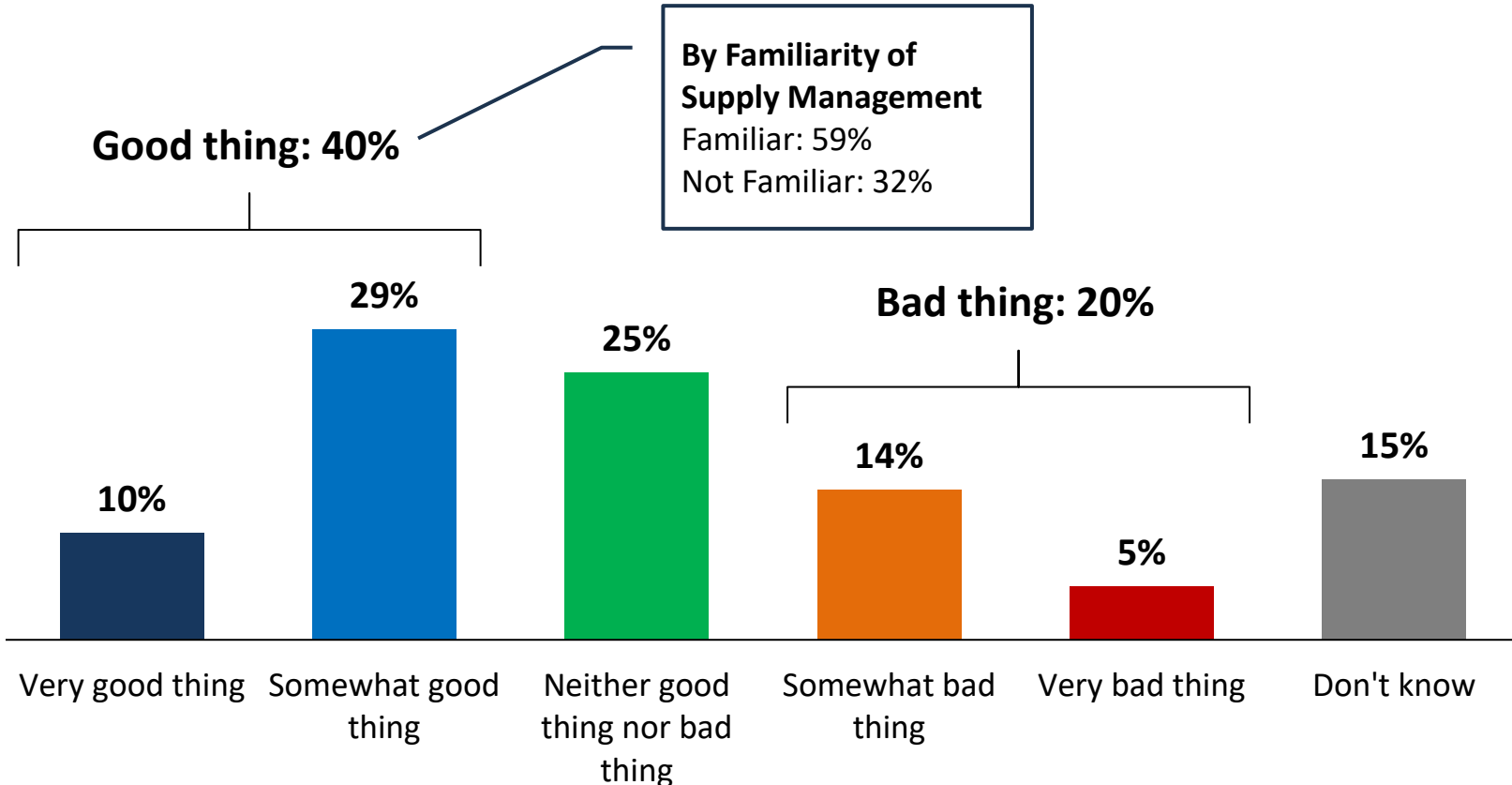
### Segmentation

Those who say 'Familiar'



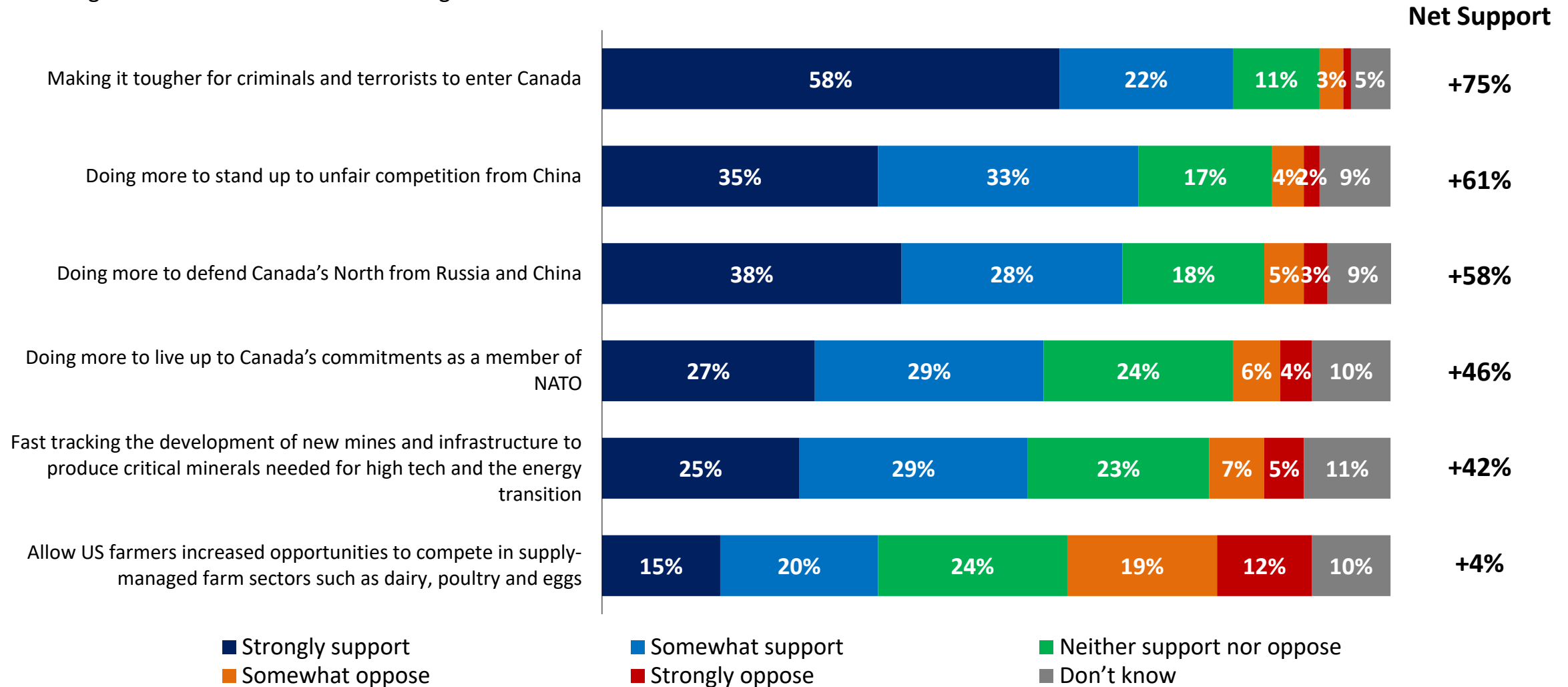
# Attitude Towards Supply Management: 2-in-5 support think supply management sounds like a good thing; highest among Liberal partisans

**Q** Does supply management sound like a good thing or a bad thing to you?  
 [asked of all respondents; n=1,000]



# New Free Trade Agreement: Making it tougher for criminals/terrorists enter Canada' has the highest support <sup>24</sup>

Now we are going to show a list of things the US will likely be seeking from Canada. For each of these items, please indicate if you support or oppose including those items in a new free trade agreement with the US.





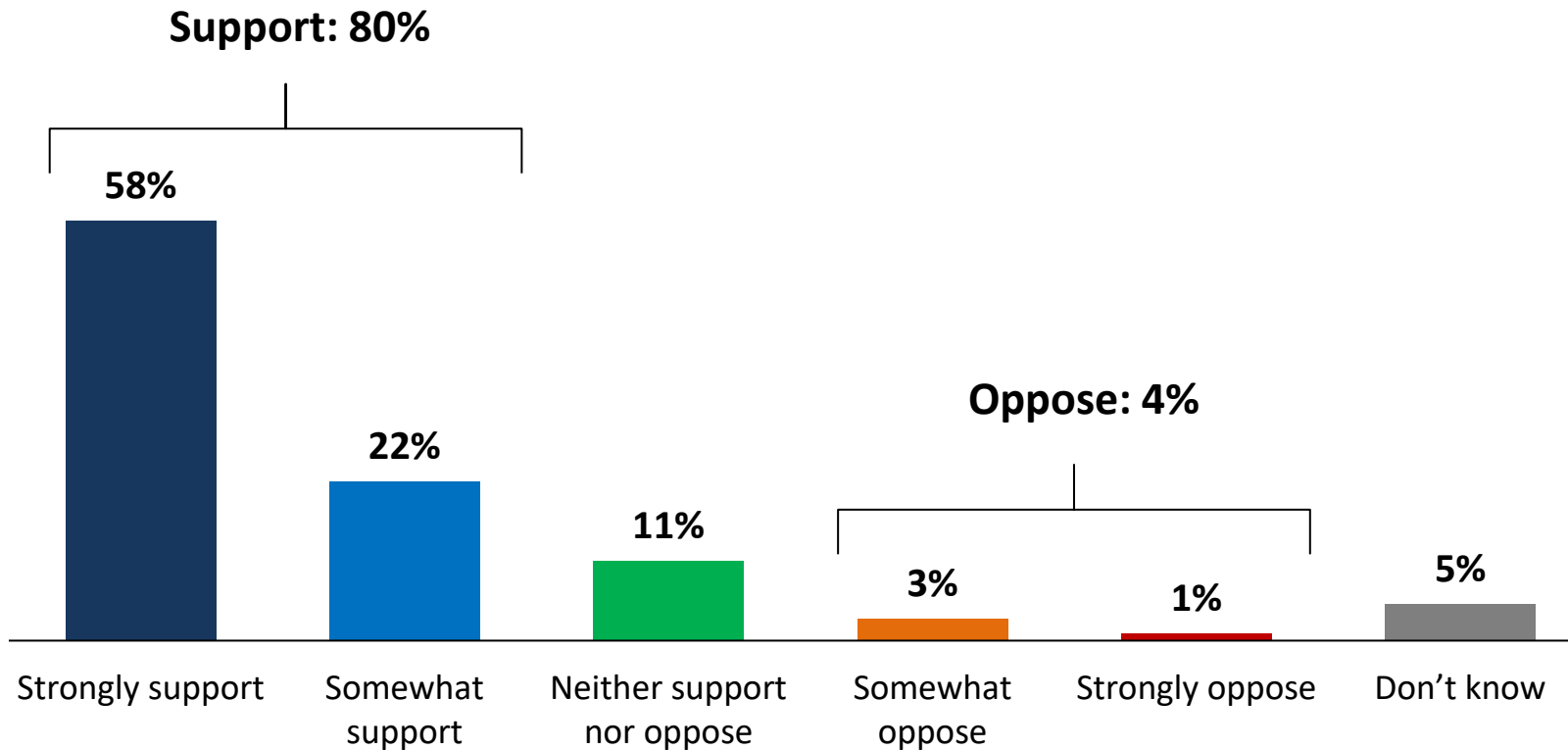
# Stricter Border Security: An overwhelming majority (80%) support tougher border control against criminal activities and terrorism



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:

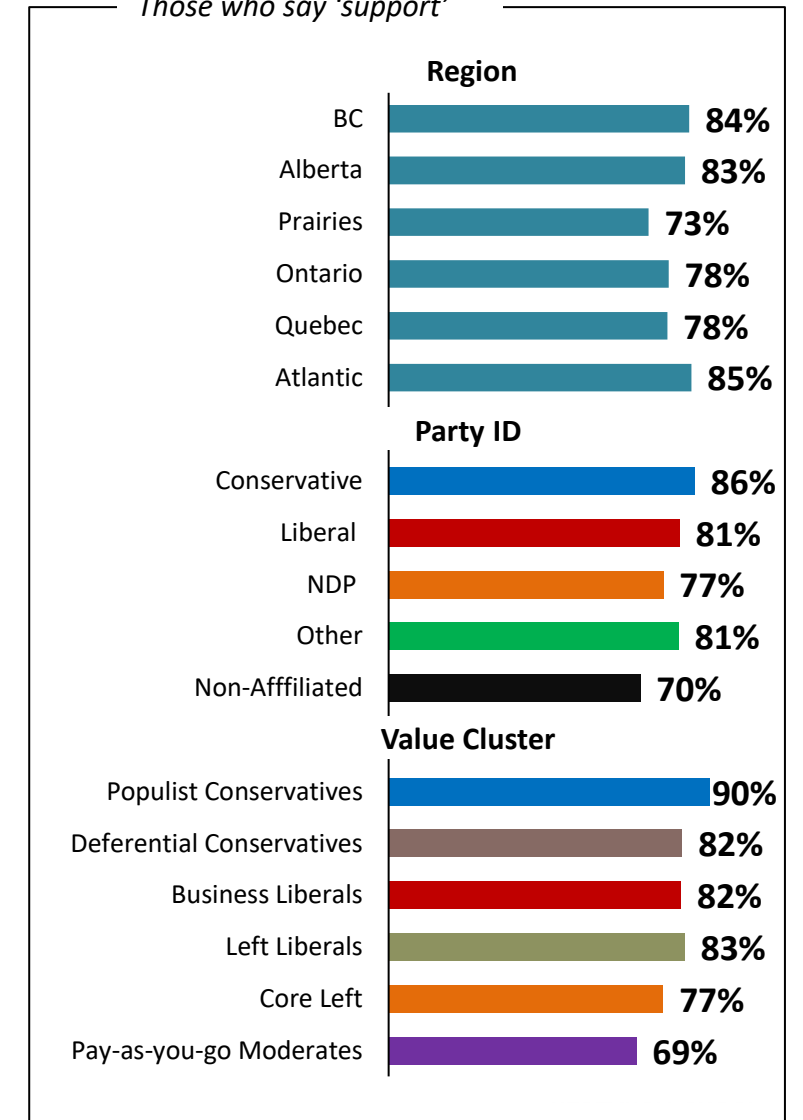
**Making it tougher for criminals and terrorists to enter Canada**

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'support'



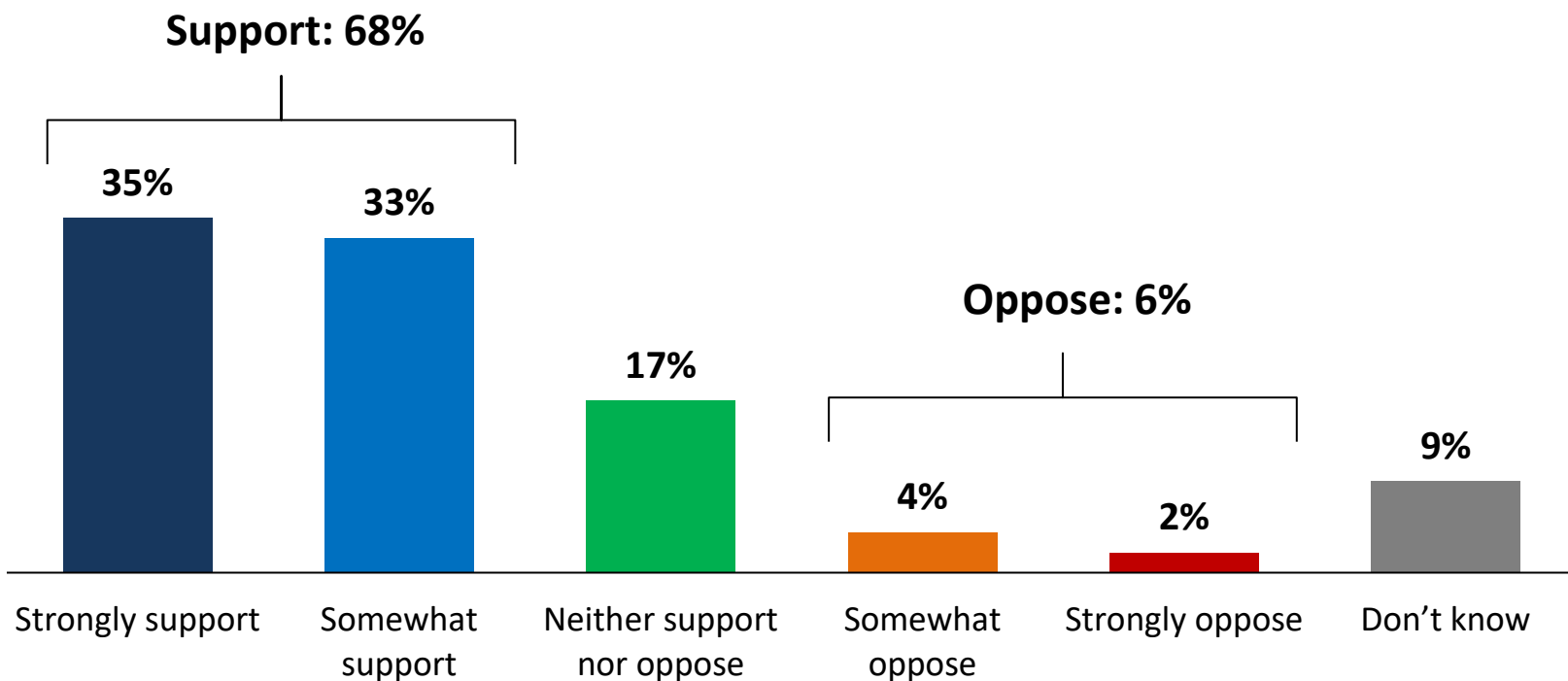
# Unfair Competition: Two thirds support stronger stance towards unfair competition from China, more so amongst Populist Conservatives



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:

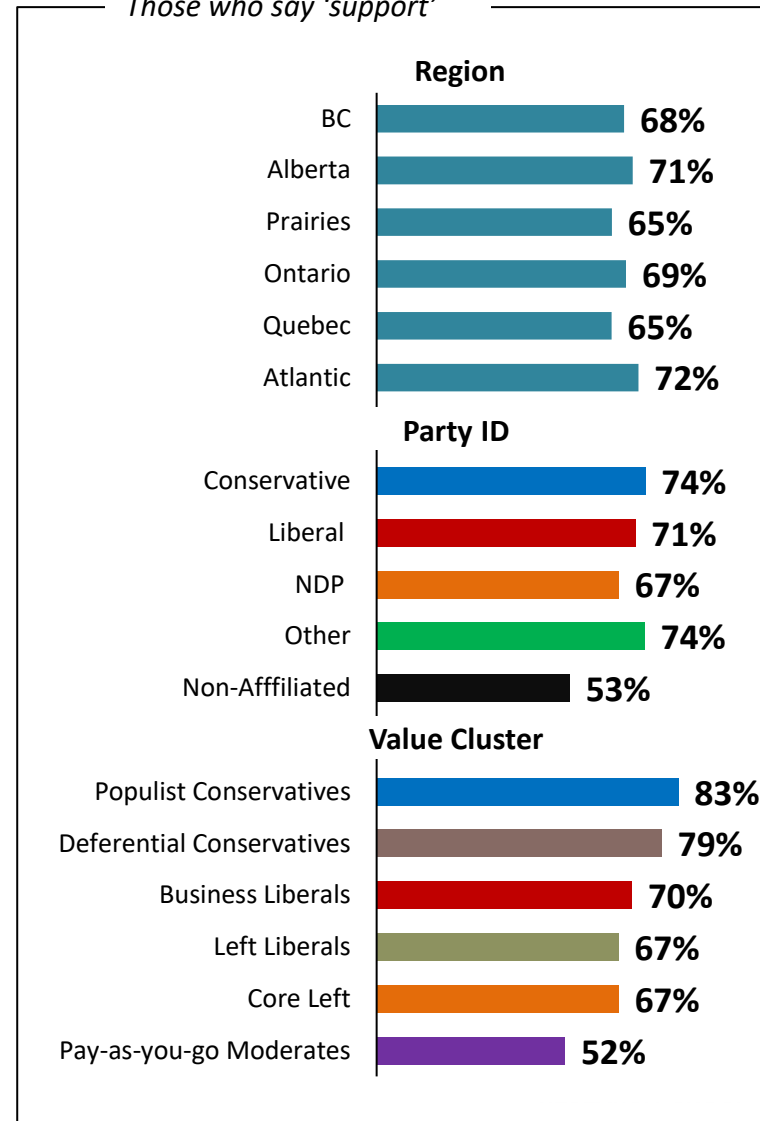
## Doing more to stand up to unfair competition from China

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'support'



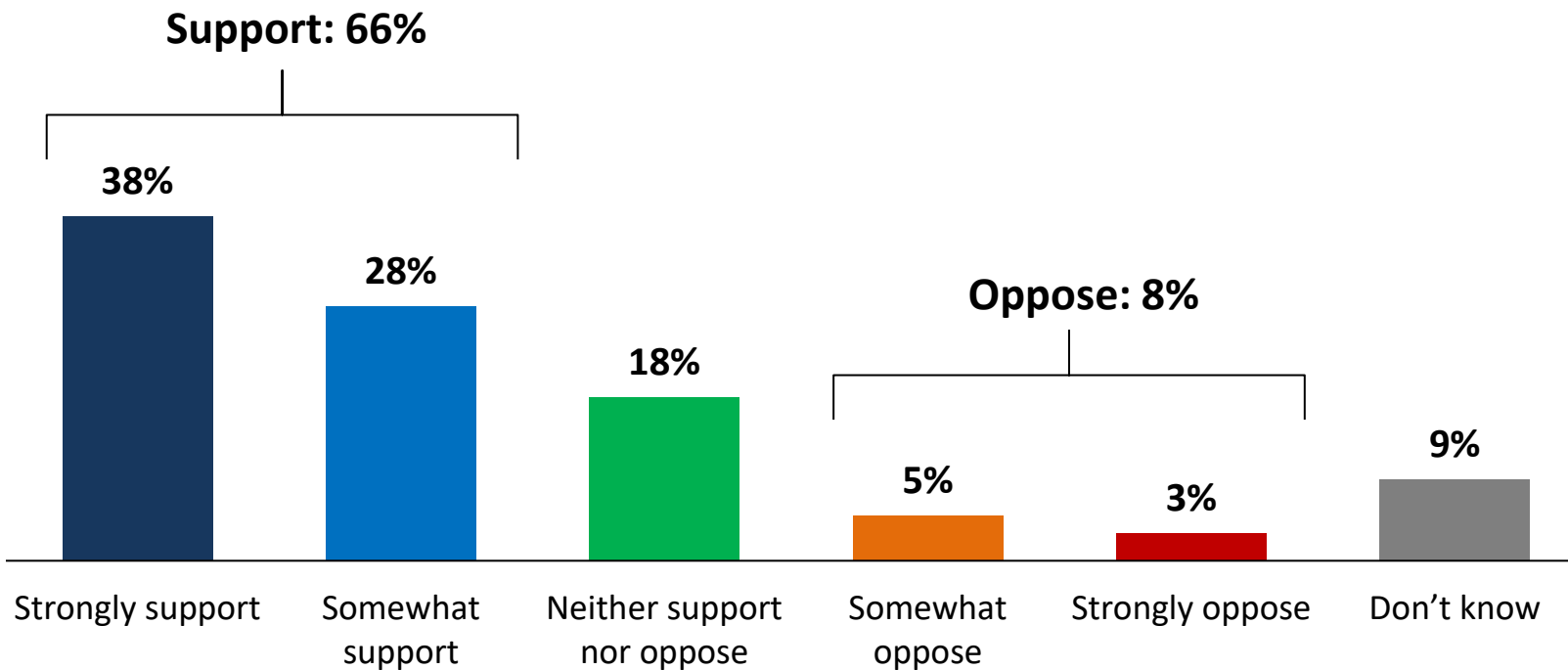
# North Border Defense: Majority of Canadians support efforts strengthening north border defense from Russia and China



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:

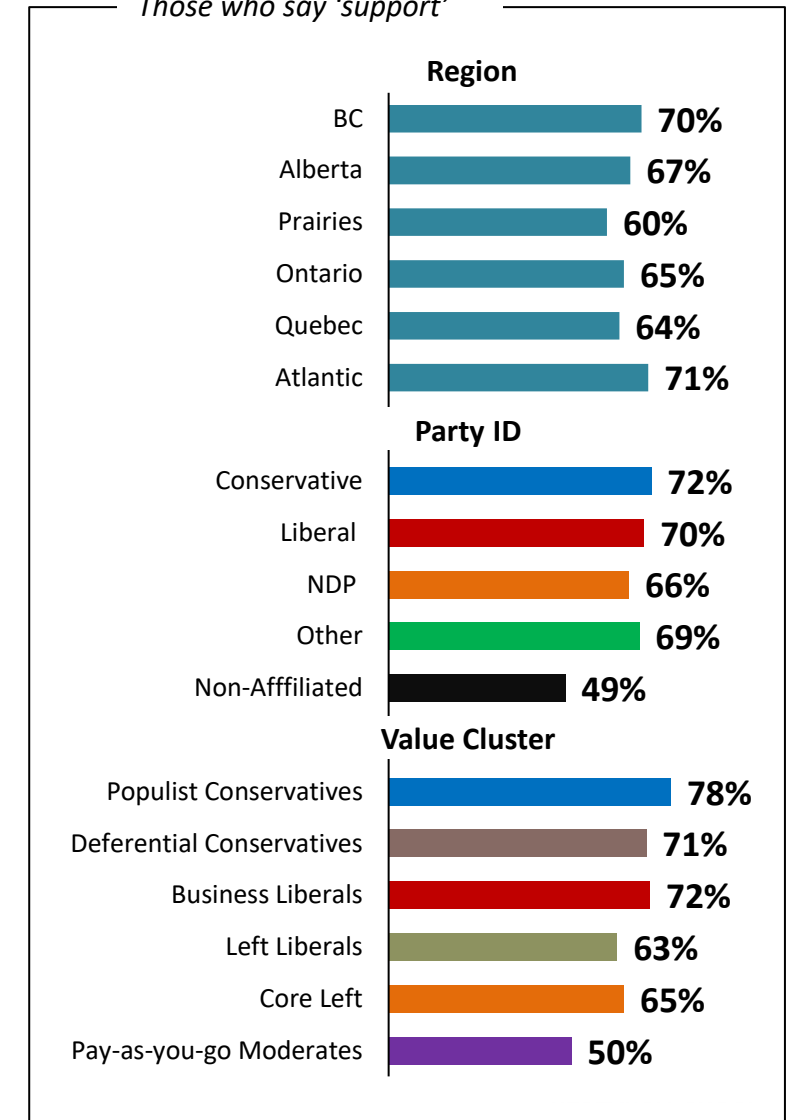
**Doing more to defend Canada's North from Russia and China**

[asked of all respondents; n=1,000]



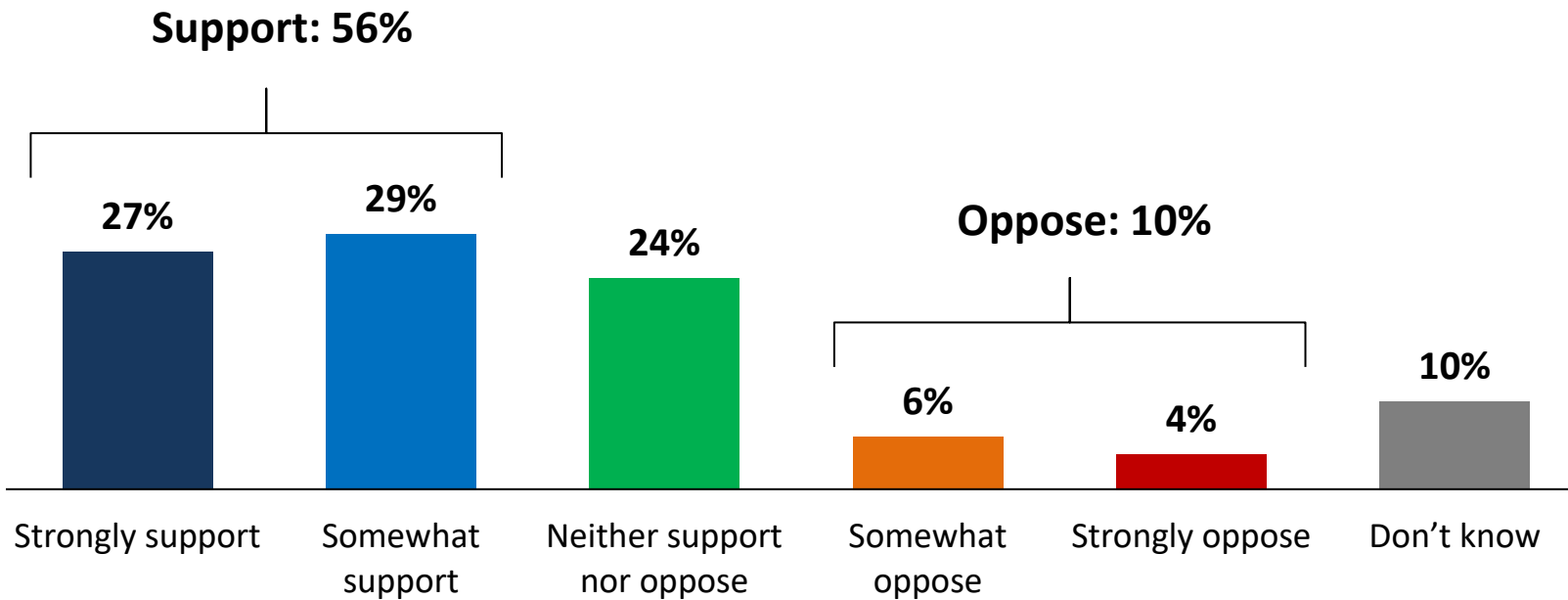
## Segmentation

Those who say 'support'



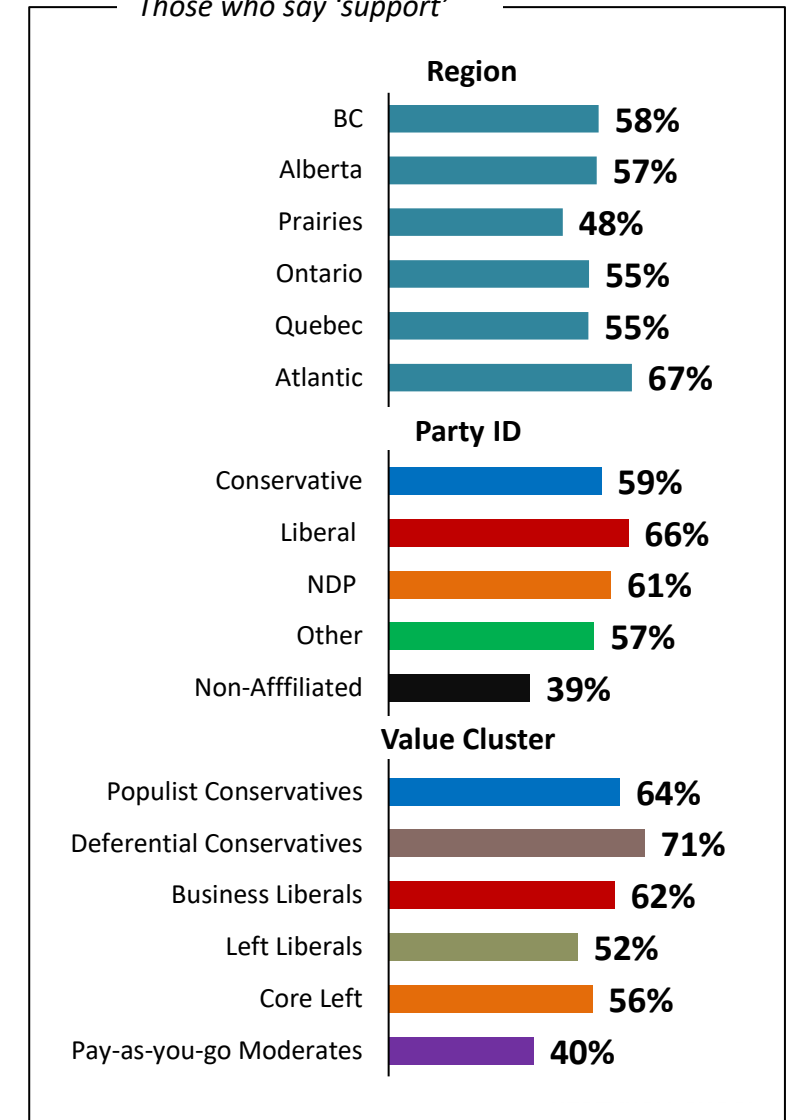
# NATO Commitment: Most Canadians (56%) support the notion of Canada living up to its commitment as a member of NATO

**Q** For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:  
**Doing more to live up to Canada's commitments as a member of NATO**  
 [asked of all respondents; n=1,000]



## Segmentation

Those who say 'support'



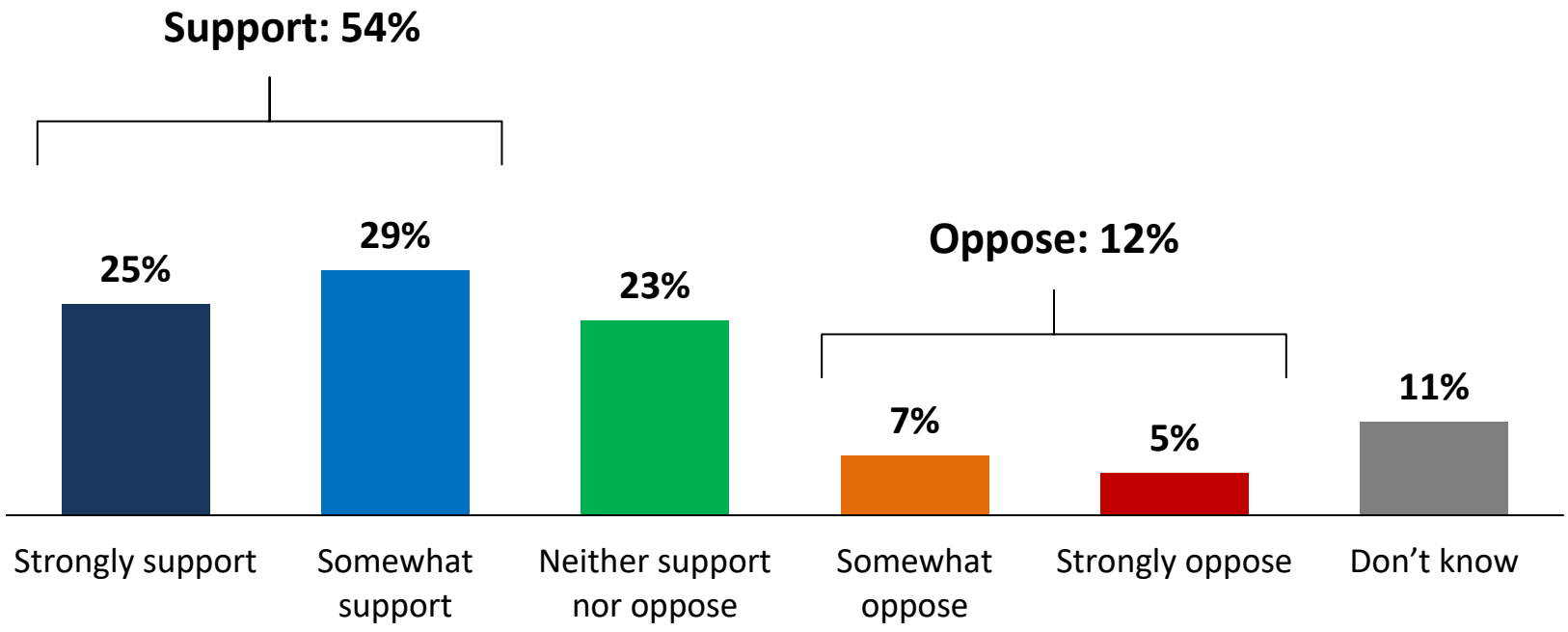
# Mining: More than half of Canadians support fast tracking infrastructure development critical for high tech and the energy transition



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:

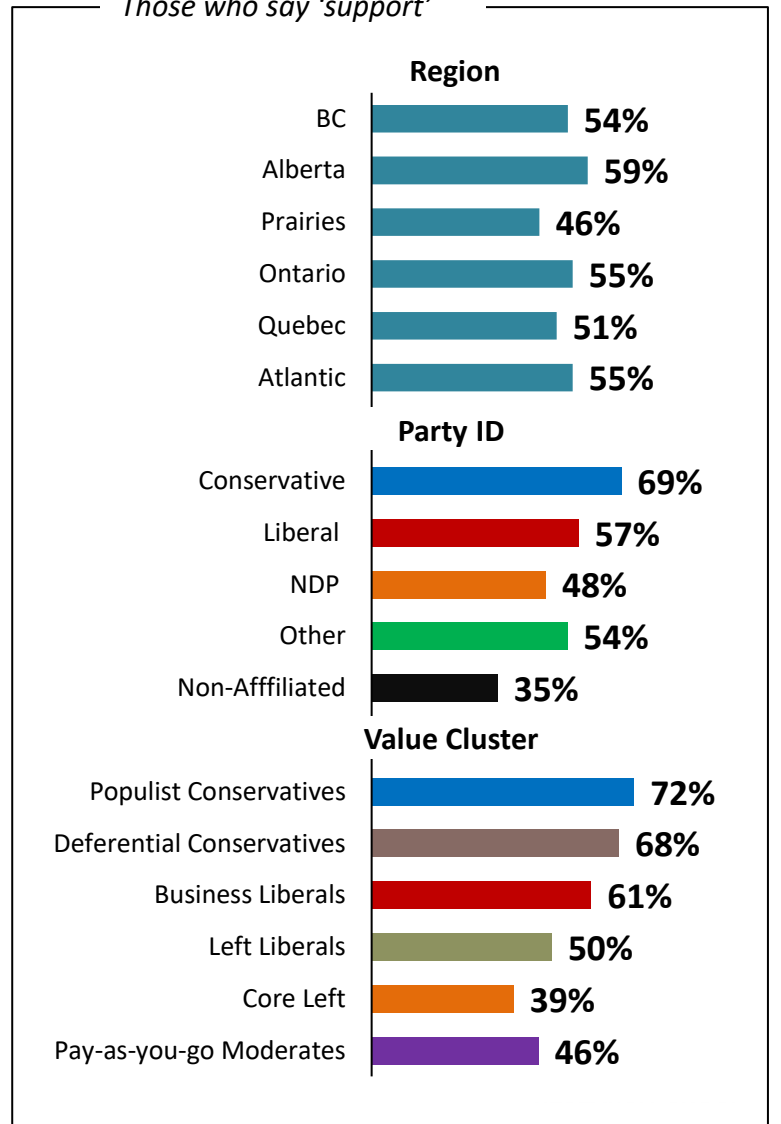
**Fast tracking the development of new mines and infrastructure to produce critical minerals needed for high tech and the energy transition**

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'support'



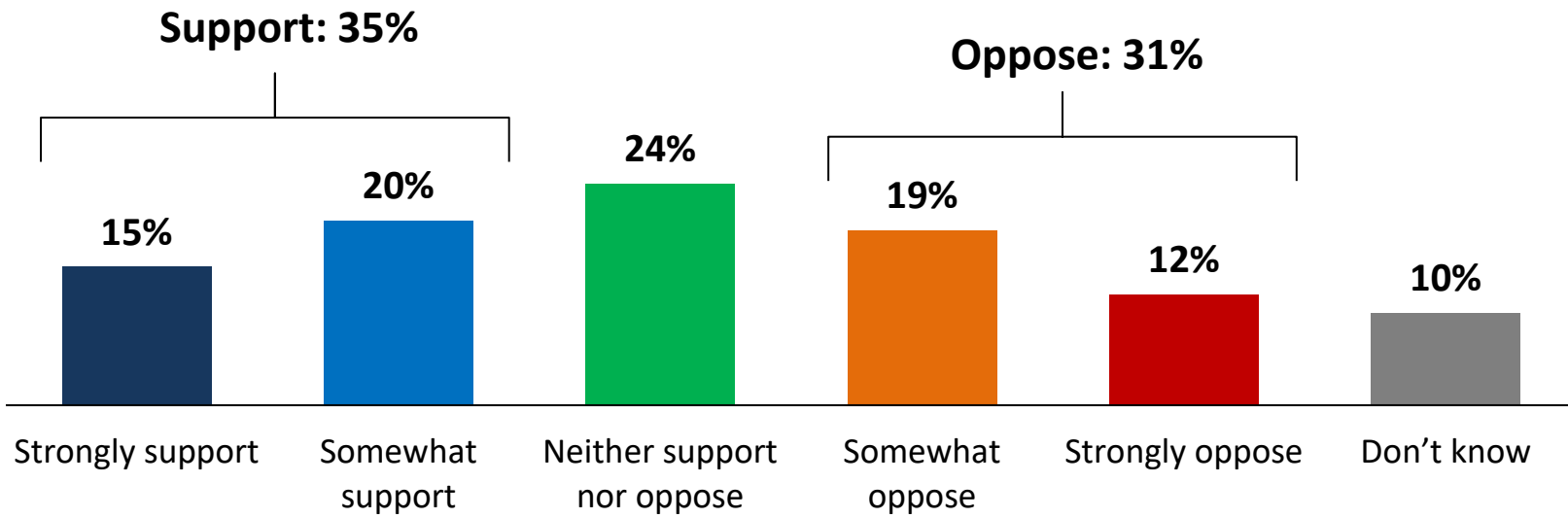
# Supply Management: Opinions are mixed on whether Canada should open supply-managed sectors or not



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US.:

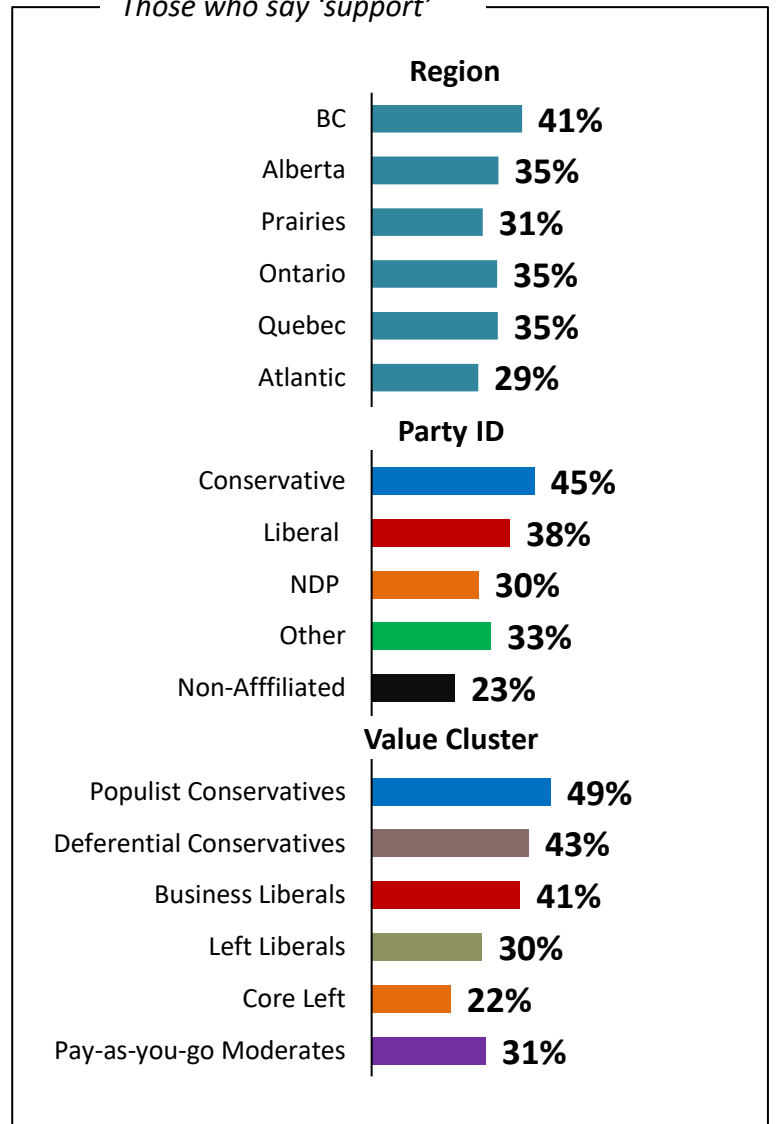
**Allow US farmers increased opportunities to compete in supply-managed farm sectors such as dairy, poultry and eggs**

[asked of all respondents; n=1,000]



## Segmentation

Those who say 'support'



# New Free Trade Agreement: The 55+ demographic tend to support most free trade items, except for opening supply-managed farm sectors



For each of these items, please indicate if you support or oppose including those items in a new free trade with the US BY Segmentation

[asked of all respondents; n=1,000]

% Net Support	Age			Familiarity with Supply Management		Attitudes towards Trump	
	18-34	35-54	55+	Familiar	Not Familiar	Excited	Afraid
Making it tougher for criminals and terrorists to <b>enter Canada</b>	+61%	+74%	+86%	+78%	+76%	+82%	+78%
Doing more to stand up to <b>unfair competition</b> from China	+48%	+56%	+74%	+70%	+60%	+66%	+65%
Doing more to <b>defend Canada's North</b> from Russia and China	+44%	+51%	+73%	+64%	+57%	+61%	+64%
Doing more to live up to Canada's commitments as a <b>member of NATO</b>	+39%	+40%	+56%	+57%	+43%	+46%	+53%
Fast tracking the development of new mines and infrastructure to produce <b>critical minerals</b> needed for high tech and the energy transition	+38%	+39%	+47%	+51%	+39%	+59%	+37%
<b>Allow US farmers increased opportunities</b> to compete in supply-managed farm sectors such as dairy, poultry and eggs	+21%	+8%	-10%	+19%	-4%	+36%	-12%

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# Additional Issues



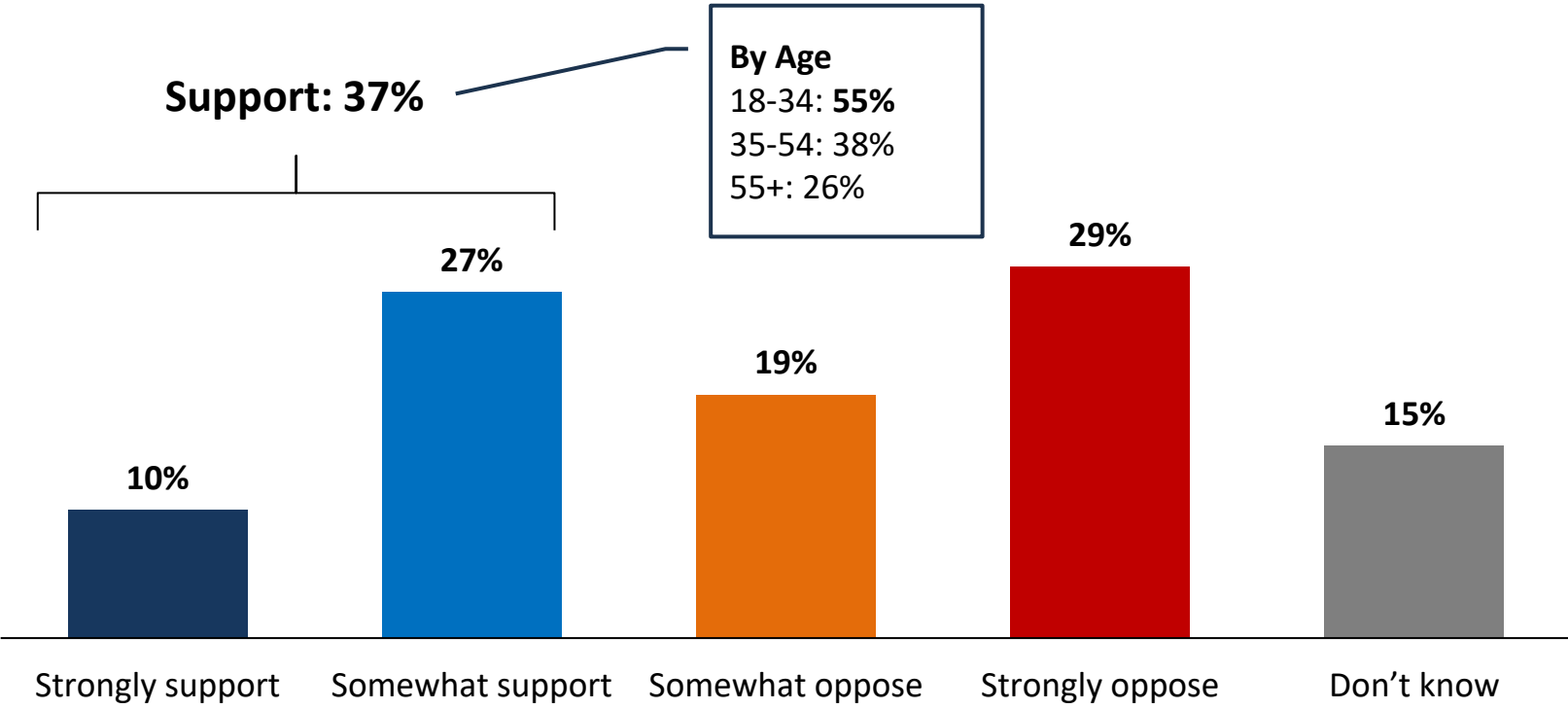
# Water Supply: Support for exporting water to the U.S. increases further eastward from BC; younger demographics more likely to support this



States like California have faced ongoing water shortage issues due to drought and other environmental factors, leading to increased concerns about water management in the western US. During his election campaign, Donald Trump suggested addressing California's water shortage by diverting water from regions like British Columbia.

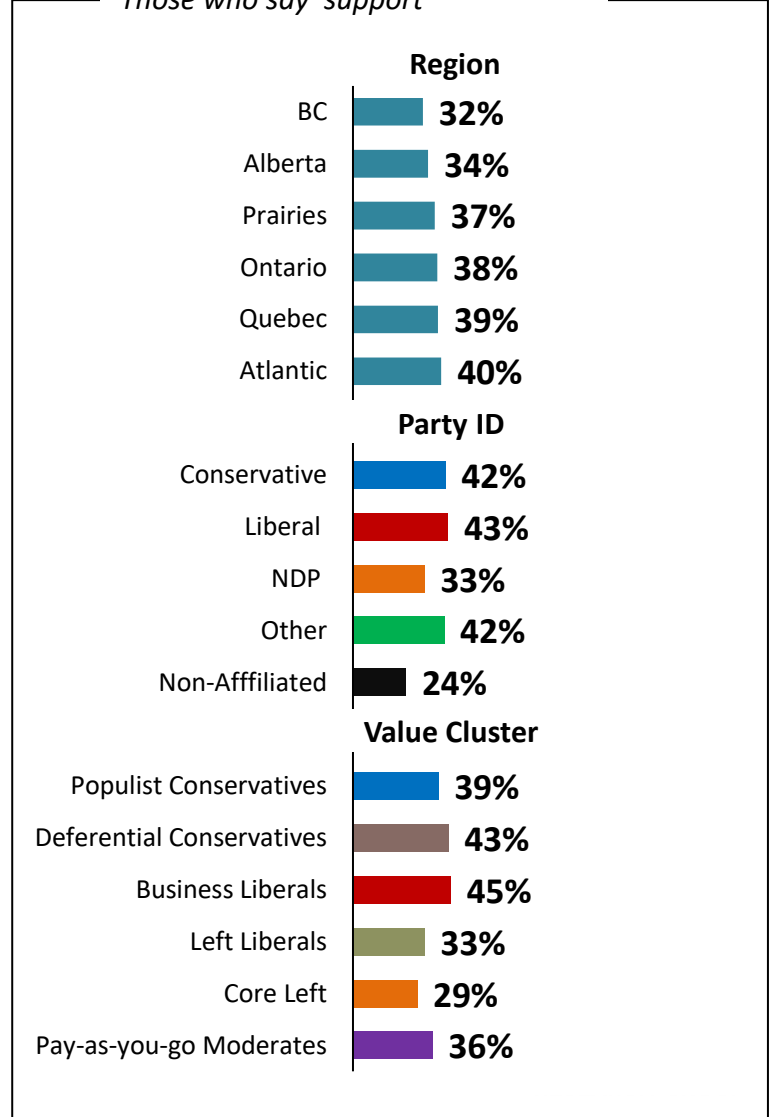
Would you support or oppose exporting Canadian water to the US to help states like California with their water shortage?

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'support'

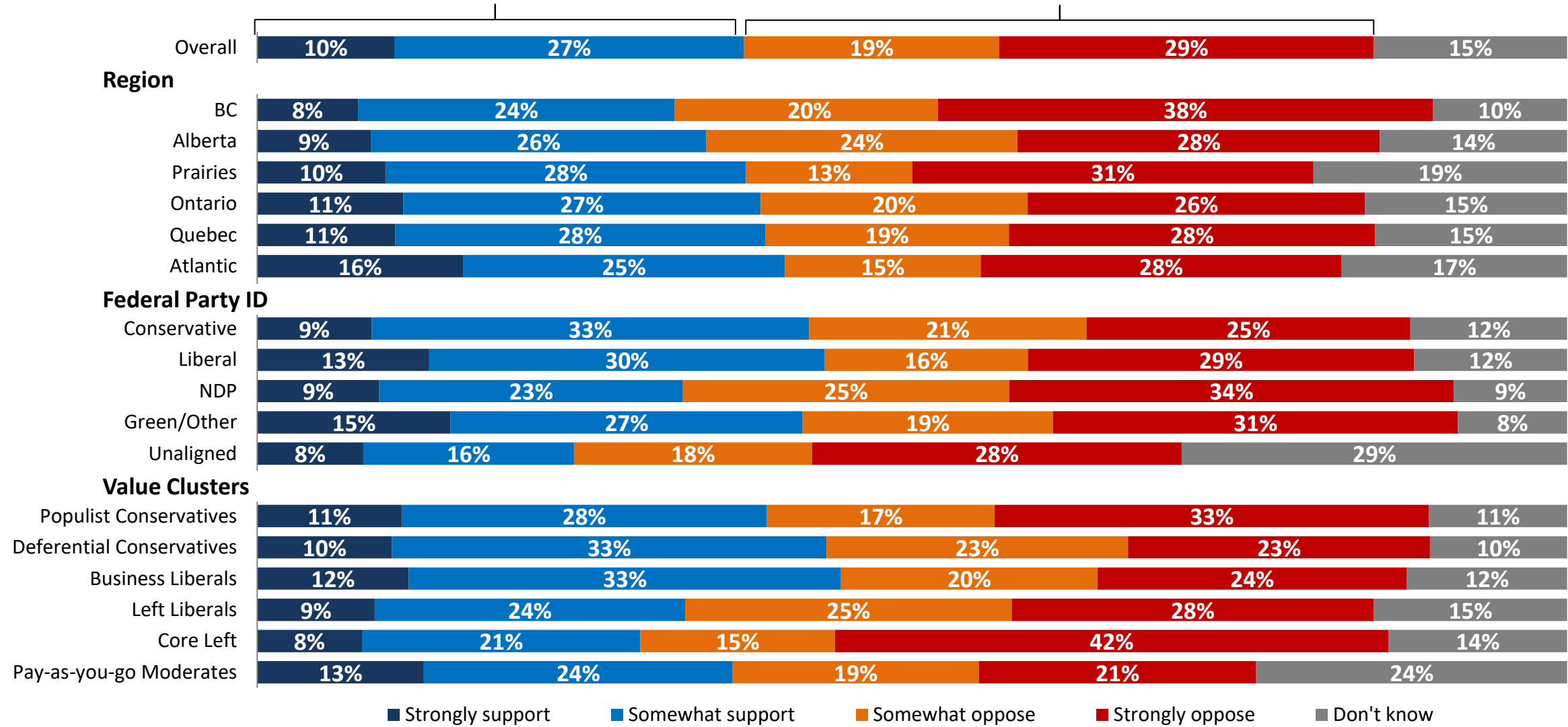


# Water Supply By Segmentation: Across most segmentations, more are opposed of exporting Canadian water to the U.S.

Would you support or oppose exporting Canadian water to the US to help states like California with their water shortage? BY Segmentation

**Support: 37%**

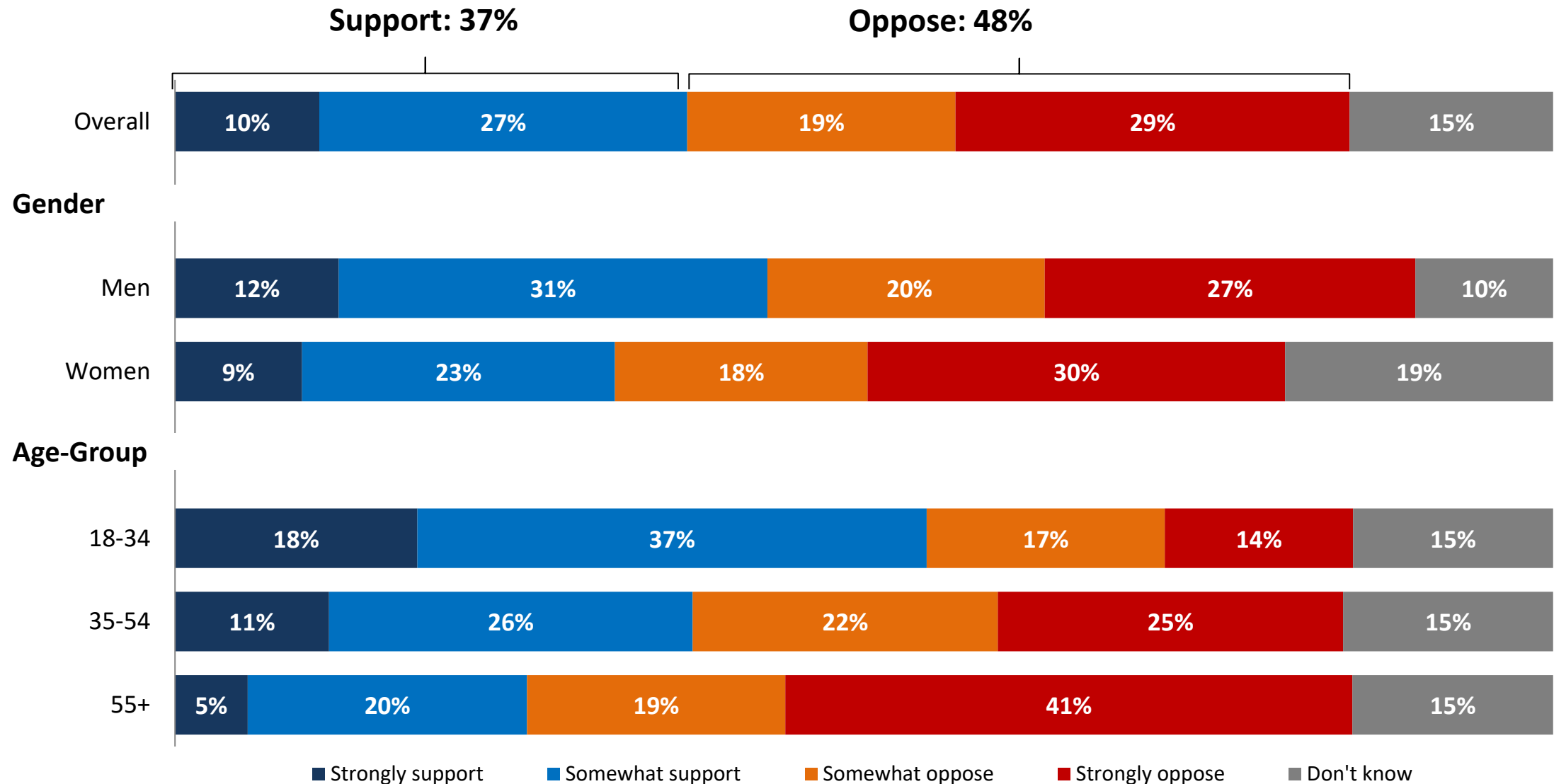
**Oppose: 48%**



■ Strongly support   
 ■ Somewhat support   
 ■ Somewhat oppose   
 ■ Strongly oppose   
 ■ Don't know

# Water Supply By Age-Gender: Younger demographics are more likely to support exporting Canadian water to the U.S.

Would you support or oppose exporting Canadian water to the US to help states like California with their water shortage? BY Segmentation



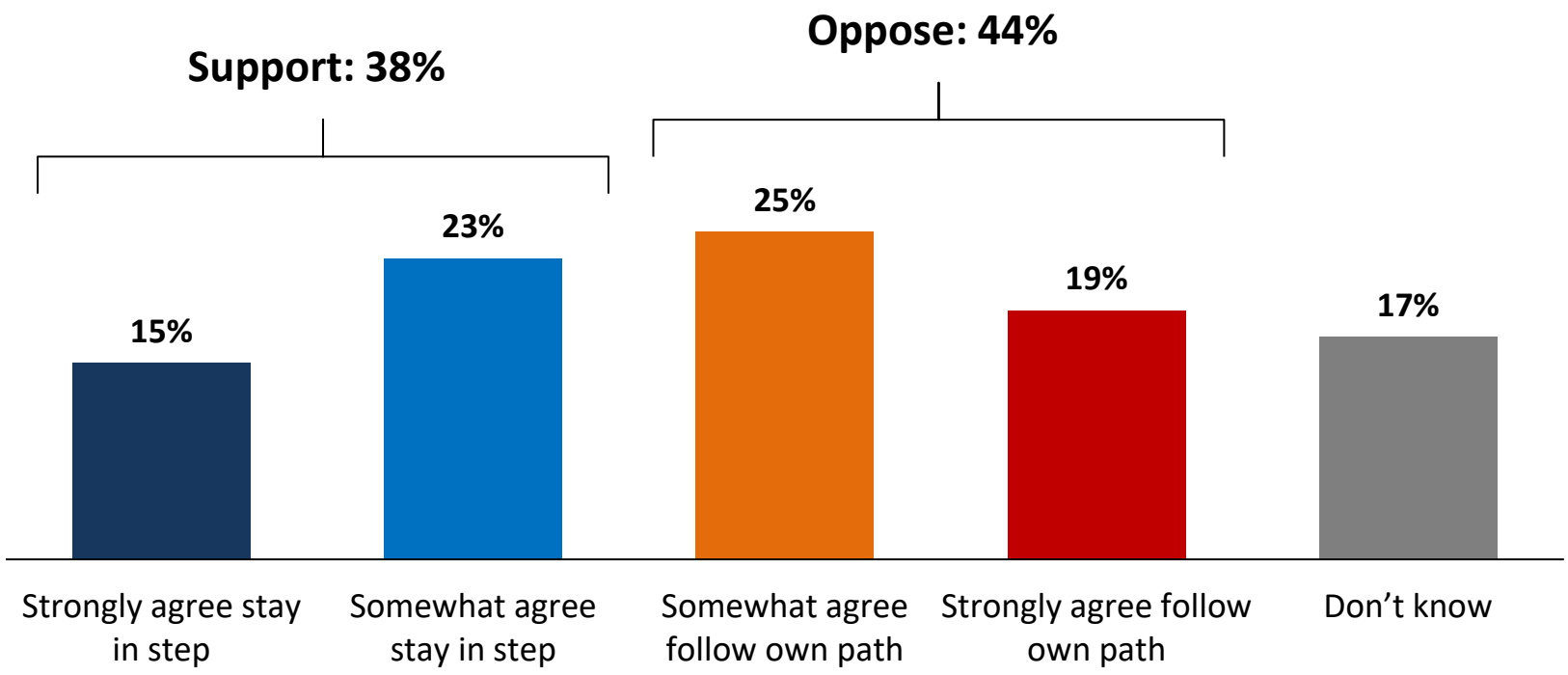
# Climate Change Initiatives: Opinions are mixed on whether Canada should align its climate change actions with those of the U.S



During his previous presidency, Trump scaled back several US climate change initiatives. Following his victory in the 2024 election, it appears likely the US will reduce its current climate action targets. One implication of this is that American businesses will not have to spend as much on reducing their climate impacts.

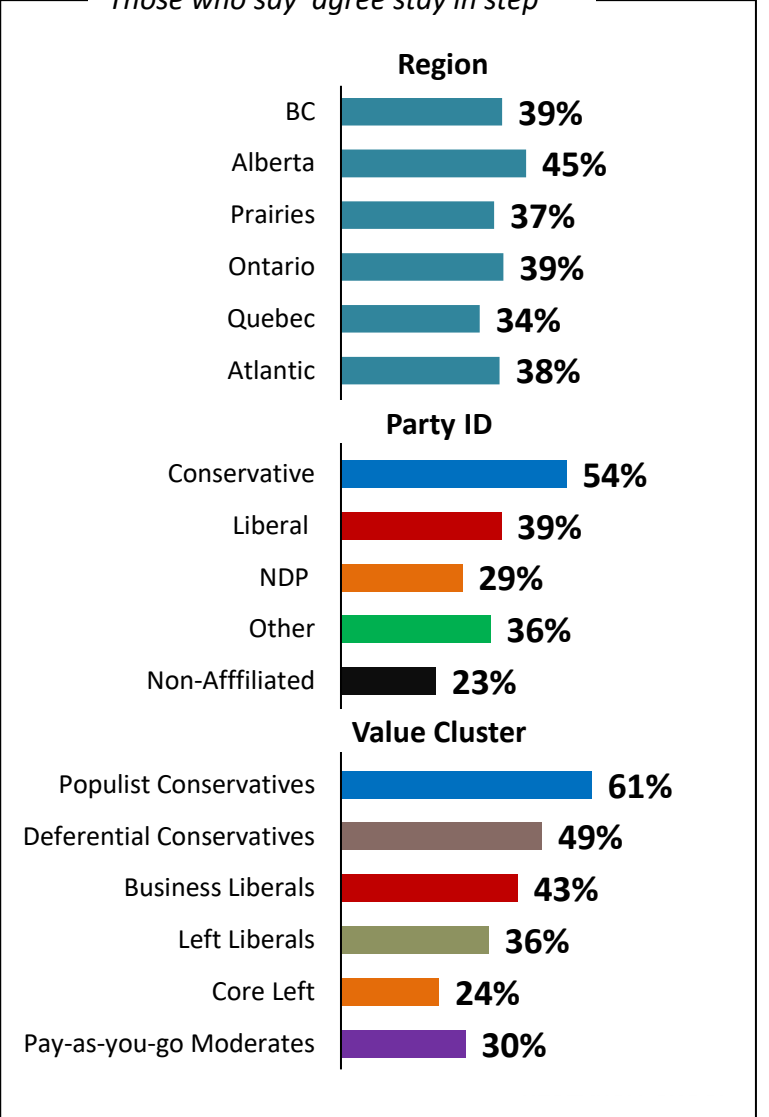
While Canada is its own country, many Canadian business directly compete with US business. Do you think Canada should generally try to stay in step with US climate change policies, or should Canada follow its own path, even if we may lose jobs and have to pay more than the US?

[asked of all respondents; n=1,000]



### Segmentation

Those who say 'agree stay in step'



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