



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

## Final Report

**Prepared for Global Affairs Canada**

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Canada 



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Aussi disponible en français sous le titre : ***Approfondir la compréhension des perspectives des Canadiens et des Américains sur les enjeux majeurs qui concernent le Canada***

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## Executive summary

### A. Background and objectives

Global Affairs Canada is dedicated to developing and implementing policies and programs informed by thorough analysis and evidence. This includes public opinion research (POR), consultations, and engagement with Canadians and international stakeholders. The department plays a key role in fostering the development and application of international law in Canada's foreign relations. Given the extensive and vital Canada-U.S. relationship, it is essential for Canada to:

- Understand the perspectives of both Canadian and American public on key issues.
- Explore perceptions of our shared allies and international organizations.
- Reflect on past efforts and identify likely areas of interest for the immediate future.

Of note, there is limited research on Canadians' & Americans' attitudes towards Canada or Canadian policies/events/issues beyond broad trends (e.g., support for trade) or high-profile issues such as the Canada-United States-Mexico Agreement (CUSMA). Because of these gaps, public opinion research is being commissioned to help support the development of a communications and advocacy strategy that will resonate with stakeholders in Canada and the United States and which supports Canada's global role as it intersects with U.S. national interests.

The research will provide key information on the public environment in Canada and the United States as it relates to Canadian issues of interest in the bilateral relationship. The results of this study will help support the development of communications and policies that resonate with the Canadian and American public on key issues of interest for both countries.

### B. Methodology

#### Canada:

The survey is comprised of 1,532 Canadians, 18 years of age and older. The survey was conducted across Canada. The survey sample was drawn from the Nanos Research Insights Lab, a probability online panel. It contains about 48,000 Canadians who were randomly recruited to join the panel by RDD land and cell-lines with live agents. The sample drawn is probabilistic in nature and can be extrapolated to the Canadian population.

Results are weighted to population proportions for region, age, and gender from the 2021 Census.

All respondents self-administered the survey online. The randomly recruited probability sample has a margin of error of +/-2.5% at a 95% confidence interval.

The fieldwork was conducted between March 16<sup>th</sup> and 22<sup>nd</sup>, 2025. Details on the rate of participation can be found in Appendix A and the questionnaire is provided in Appendix B.

#### U.S.:

The survey is comprised of 1,870 Americans, 18 years of age and older. The survey was conducted across the U.S.. The survey sample was drawn from the National Opinion Research Centre (NORC) AmeriSpeaks Panel, a probability online panel in the U.S. The panel currently contains approximately 66,000 panelists who were randomly selected from the NORC National Frame and other address-based sample (ABS)



frames and recruited by mail, telephone and in-person field interviews. The sample drawn is probabilistic in nature and can be extrapolated to the U.S. population.

Results are weighted to U.S. population proportions for region, age, and gender from the most recent Census.

All respondents self-administered the survey online. The randomly recruited probability sample has a margin of error of +/-2.3% at a 95% confidence interval.

The fieldwork was conducted between April 17th to 21st, 2025. Details on the rate of participation can be found in Appendix A and the questionnaire is provided in Appendix B.

## C. Key findings

### A. Priority issues for Canadians and Americans

When asked about their top priority issues today, Canadians most often selected a lack of affordable housing (38%), healthcare (34%), disinformation (30%) and climate change (25%) as their top issues. For Americans disinformation (31%), healthcare (29%) and a lack of affordable housing (24%) are the top issues. Gun violence is much more likely to be selected as a top priority by Americans (21%) compared to Canadians (4%), as was racism (Canada: 3%; U.S.: 13%), while Canadians are more likely to be concerned about climate change (25% compared to 17% of Americans).

Canadians were more likely to select increasing trade between Canada and the U.S. as a top issue (Canada: 16%; U.S.: 3%) or strengthening the security of the Canada-U.S. border (Canada: 13%; U.S.: 2%).

Of note, Americans are less likely to say gun violence is a top priority now (21%), compared to 2023 (33%). They are also less likely to say crime is a top priority now (16%), compared to 2023 (27%). There is an increase in those who note immigration as a top priority (23%, not mentioned in 2023), along with fentanyl (10%), (not mentioned in 2023). Disinformation also saw an increase (31%, up from 24% in 2023).

### B. General trade

#### Closer trading relationship with other countries

In terms of how likely they would support Canada/the United States having a closer trading relationship with another country, Canadians and Americans would both be most supportive of their country having a closer trading relationship with another country if its goods are most competitively priced on the global market (Canada: 86% much more likely/somewhat more likely to support; U.S.: 78%) or if its goods have less impact on the environment than another trading partner (Canada: 76%; U.S.: 69%). These are followed by three in five Canadians who would be more supportive of Canada having a closer relationship with another country if its goods came from a close neighbour of Canada (60%), and seven in ten Americans saying the same regarding goods from a close U.S. neighbour (68%). Just over half of Canadians (54%) and Americans (53%) would support a closer trading relationship, provided that workers on both sides belong to the same labour unions.



## Canada and U.S. trade relationship

Canadians and Americans are much more likely to strongly or somewhat agree that trade between each other provides economic benefits (Canada: 82%; U.S.: 83%). Canadians (64%) are more than twice as likely as Americans (31%) to agree that Canada should periodically impose tariffs on U.S. imports to protect Canadian national security. Americans are significantly more likely to agree that Canada is their most secure and reliable trading partner than Canadians are to agree with the same statement about the United States (Canada: 35%; U.S.: 67%).

Canadians are more likely to say the Canada-U.S. trade relationship has a negative (67%) rather than a positive impact (13%) on the Canadian economy. Americans are divided on how they think this relationship impacts the American economy, with about three in ten each who say there is a negative (30%), positive (30%) or no impact (32%).

Additionally, most Canadians say they are concerned about the trade relationship between the U.S. and Canada (83%), while just over one in two Americans say the same (53%).

When asked what specific concerns they have about the current Canada-U.S. trade relationship, Canadians are most concerned about increase in costs/prices (15%) and confusion/instability/irrational decisions (14%). Americans are most concerned about loss of friendly relationship/ally (17%) and increase in costs/prices (16%). Of note, 17% of Americans have no concerns (compared to 1% of Canadians).

Top perceived benefits for Canada from the current Canada-U.S. trade relationship are: being in close proximity/nearby/convenient (14%), the relationship being mutually beneficial for Canada and the U.S. (11%), the U.S. buying Canadian goods and products/resources/big market (10%), and finding a new trade relationship/allies (9%). Of note, 16% say there are no benefits.

For Americans, the top perceived benefits of the current Canada-U.S. trade relationship are: having a friendly relationship/allies (12%), the relationship being mutually beneficial/buy each other's goods and products (11%), access to more resources/products (10%), and lower prices/cheaper costs (9%). Of note, 18% of Americans say there are no benefits.

Regarding downsides to Canada in terms of the current Canada-U.S. trade relationship, Canadians most often mention overreliance on the U.S. (25%), followed by instability/continual changes/uncertainty (19%) and increase in costs/prices (15%). On the other hand, Americans are most likely to say increase in costs/prices (18%), followed by loss of friendly relationship/ally (13%) and negative impact on the U.S. economy/businesses/suppliers (10%). Of note, 16% of Americans say there are no downsides.

## C. Tariffs

### Support for imposing tariffs

Canadians are close to four times more likely to support Canada imposing retaliatory tariffs on U.S. goods (72%) than Americans are on the U.S. imposing tariffs on Canadian goods (20%). One in two



Americans oppose imposing tariffs (51%), while just over one in ten oppose imposing retaliatory tariffs (12%).

Compared to 2023, Americans' support for imposing tariffs on Canada has gone down in all situations tested, including if they contribute to higher housing costs for American homebuyers (14%, down from 21%), if they result in job losses in their local community (12%, down from 21%) and if they support jobs in their community (66%, down from 79%).

### **Views on trade and tariffs between Canada and the U.S.**

Both Canadians and Americans are much more likely to disagree (score of 0-3 out of 10) rather than agree (score of 7-10 out of 10) that Canada should become part of the U.S. (Canada: 88% disagree ; U.S.: 71% disagree), that Canada "owes" the U.S. (Canada: 84% disagree; U.S.: 59% disagree) and that the U.S. subsidizes Canada (Canada: 78% disagree; U.S.: 36% disagree).

A similar proportion of both Canadians and Americans agree that they will have to pay more for things like groceries and gas if tariffs are imposed on the U.S. by Canada or vice versa (Canada: 69% agree; U.S.: 58% agree), and that free trade between the two countries has lowered the cost of goods for consumers in their country (Canada: 55% agree; U.S.: 43% agree).

Canadians have a relatively higher level of trust than Americans in their federal government (Canada: 49% agree; U.S.: 14% agree) or mainstream media (Canada: 44% agree; U.S.: 16% agree) to provide accurate information on Canada-U.S. relations, while both have a similarly low level of trust in social media (Canada: 8% agree; U.S.: 5% agree).

### **Potential impacts on support for imposing tariffs**

More than eight in ten Canadians would strongly or somewhat support continuing to impose retaliatory tariffs on imports from the U.S. if they support jobs in their local community (83%), while around one in two each would support continuing to impose these tariffs even if they increase taxes on Canadian businesses (54%) or consumers (51%), contribute to higher housing costs for Canadian homebuyers (49%) or result in job losses in their local community (48%).

Americans' appetite for continuing to impose tariffs on imports from Canada is much lower, with close to one in ten that supports maintaining tariffs to some extent even if they increase taxes on American businesses (16%), lead to higher housing costs in the U.S. (12%) or result in job losses (11%) or higher taxes on U.S. consumers (11%). However, support for sustaining tariffs rises significantly if they supported jobs in their local community (57%).

### **D. Buy American [U.S. ONLY]**

Americans are slightly more likely to support (31%) rather than oppose (19%) Buy American policies for government contracts knowing they could lead to potential delays and increased costs to the government, while one in three are neutral. However, in terms of Buy American policies for state governments, Americans are twice as likely to prefer that state government contracts be open to American companies from outside that state to ensure the state receives the best value for money



(54%) rather than only be open to American companies from that state to protect local businesses (25%).

## E. CUSMA/USMCA

### Views on CUSMA/USMCA agreement

Canadians are more likely than Americans to strongly agree or agree that free trade between Canada, the U.S. and Mexico provides benefits to businesses from their country (Canada: 92%; U.S.: 77%) or citizens from their country (Canada: 90%; U.S.: 79%), while Americans are more likely to agree to one extent or another that Canada and the U.S. should further increase trade and integrate their economies through trade agreements (Canada: 56%; U.S.: 78%).

About two in three Canadians and Americans each think it is important for the Canadian and U.S. governments to renew free trade agreements between themselves and Mexico in 2026 (Canada: 69%; U.S.: 67%).

### Views on Canada and U.S. being allies and partners

Most Canadians and Americans strongly or somewhat agree that the two countries are essential partners for each other, although Americans are more likely to agree (85%) than Canadians (74%). However, Canadians are significantly less likely to agree that the U.S. is Canada's best friend and ally (40%) than Americans' are to agree to the reverse (73%).

Compared to 2023, Americans who have an opinion are now noticeably more likely to agree that Canada is the U.S.'s best friend and ally (82%, up from 72% in 2023). Views on Canada being an essential partner for the U.S. are marginally up (91% strongly agree/somewhat agree, compared to 86% in 2023).

## F. Border Security

### Border issues of concern

The top issue of concern for Canadians in relation to the Canada-U.S. border is firearms (Canada: 41%, U.S.: 3%), followed by human trafficking and smuggling (Canada: 20%, U.S.: 21%) and organized crime (13%). Americans are more concerned about illegal drugs (U.S.: 22%, Canada: 10%) and human trafficking (U.S.: 21%, Canada: 20%), while more than one in three say they are not concerned about any of them (36% Americans; 11% of Canadians).

### Management of Canada-U.S. border

A majority of Canadians and Americans strongly agree or agree that the way the Canada-U.S. border is currently managed enables smooth travel (Canada: 81%; U.S.: 72%) and trade between the countries (Canada: 81%; U.S.: 72%), including contributing to the economy of their country (Canada: 73%; U.S.: 66%).





There was less agreement that the border contributes to reducing crime in both countries (Canada: 48%; U.S.: 42%) or that it encourages illegal immigration into their country (Canada: 44%; U.S.: 30%). Canadians are more likely to agree than Americans that the border poses a threat to the national security of their country (Canada: 38%; U.S.: 27%), while Americans are more likely to agree that the border contributes to fentanyl trafficking in the U.S. (Canada: 19%; U.S.: 38%), although this is a minority opinion.

### **Safety and security of border**

Both Canadians and Americans were more likely to strongly agree or agree that the U.S. is a major source of fentanyl into Canada (Canada: 60%; U.S.: 24%) than they were to agree that Canada is a major source for the U.S. (Canada: 12%; U.S.: 18%), and Americans were more likely to agree that Canada is doing a good job of securing the Canada-U.S. border (58%) than Canadians were to agree about the reverse (38%).

Close to four in five Americans agree to one extent or another that the Canada-U.S. border is safer than the U.S.-Mexico border.

### **Canada's Border Security Plan**

Canadians are significantly more likely to report having heard of Canada's new border security plan (87%) than Americans (28%).

About three in five Canadians and Americans think the measures proposed in Canada's border plan will deter people a great deal or somewhat from crossing into the U.S. irregularly or undetected (Canada: 60%; U.S.: 61%), although of note, close to one in five Americans are unsure what impact the measures will have (19%; 7% of Canadians).

A majority of Canadians and Americans support or somewhat support the overall goals of Canada's Border Plan, although Canadians are slightly more likely to support this than Americans (Canada: 81%; U.S.: 72%). In terms of their support for Canada increasing the use of various technologies to manage the Canada-U.S. border, both Canadians and Americans are similarly supportive of app or web-based forms (Canada: 78%; U.S.: 75%), electronic gates (Canada: 71%; U.S.: 74%) and facial recognition/biometrics (Canada: 68%; U.S.: 70%). Canadians are more likely to support Canada increasing the use of drones to manage the border (82%) than Americans are (68%).

## **G. Government Communications on Canada-U.S. Issues [Canada Only]**

### **Top sources of information**

Canadians most often selected TV as the source they typically go to for news (66%), followed by newspaper (51%), radio (45%) and social media (40%). In terms of the specific social media channels, they use most frequently, they most often rank Facebook first (29%), followed by YouTube (21%) and Instagram (10%).



## Canadian government communications on Canada-U.S. issues

Canadians are more than twice as likely to say the Government of Canada is doing a good job (55%) rather than a poor job (21%) at informing the Canadian public about Canada-U.S. trade relations. They are similarly more likely to have a great deal of confidence (56%) rather than no confidence (26%) in the government handling Canada-U.S. relations.

### H. Cross-Border Supply Chains [U.S. Only]

Americans are more likely to think that the Canadian economy is important or somewhat important to the U.S. economy (83%) as compared to the Mexican economy (75%).

### I. Collaboration

#### Impact of U.S. government

Canadians are significantly more likely than Americans to think the current U.S. government will have a negative or a somewhat negative impact on Canada-U.S. relations (Canada: 90%; U.S.: 60%), with four in five Canadians saying it will have an outright negative impact (80%; U.S.: 45%). Less than 1% of Canadians and 1 % of Americans think the current U.S. government will have no impact, and just 6% Canadians believe that the impact will be positive or somewhat positive vs. 24% of Americans.

#### Top sources of news and information

Both Canadians and Americans most often report going to TV for news or information about Canada-U.S. relations (Canada: 65%; U.S.: 54%). Canadians also often report going to newspapers (50%), radio (41%) or social media (37%), while Americans often report having social media as a source (34%) or a newspaper (26%). Of note, 12% of Americans report they do not go to any of these sources for news or information about Canada-U.S. relations, compared to just 2% of Canadians.

#### Canada-U.S. relationship

In terms of the Canada-U.S. Relationship, both Canadians (63%) and Americans (47%) rank trade and economic cooperation as the top areas they think both countries should prioritize in their relationship. Canadians rank Environmental and climate policies second (12%), whereas Americans were more likely that Canadians to rank border security second (21% Americans, 9% Canadians).

Canadians most often select “each other’s customers” in terms of what best describes the relationship between the U.S. and Canada (25% Canadians; 11% of Americans), while Americans most often select “allies” as the best descriptor (32% Americans; 18% of Canadians). Americans were also more likely to select the descriptor “good neighbours” than Canadians (24% Americans; 13% of Canadians), while Canadians were more likely to say none of the listed descriptors describe the relationship (16% Canadians; 3% of Americans). Comparing tracking data available for the U.S., Americans with an opinion are now less likely to describe the relationship between the U.S. and Canada as “good neighbours” (27%, down from 42% in 2023).



## **J. Arctic Security [CANADA ONLY]**

About three in four Canadians agree that Canada should invest more resources into Arctic security (75%) and that Canada's arctic is at risk from foreign enemies (75%). They are three times more likely to disagree (45%) rather than agree (13%) that Canada is doing an adequate job of securing its Arctic lands.

## **K. Energy [U.S. ONLY]**

Americans are much more likely to oppose rather than support a tariff on Canadian energy, if it means an increase in costs for the U.S. (56% oppose; 10% support) or results in increasing imports to the U.S. from countries like Russia or Venezuela (60% oppose; 7% support).

## **L. Travel**

Canadians are more likely to report crossing the border into the U.S. by land (6% regularly; 63% occasionally) than Americans are to report crossing the border into Canada (1% regularly; 25% occasionally). 72 % of Americans report they never cross the border into Canada by land, compared to 30 % of Canadians. Among those who report crossing the border by land at least occasionally, nearly all describe the experience as easy or somewhat easy (93% of Canadians; 91% of Americans).

A majority of Canadians report they are aware that the Government of Canada provides travel advice for Canadians, including those currently in the U.S. (84%), while just under one in five report they were not aware of this (16%).

## **M. Advice for Elected Officials**

In terms of Canada-U.S. relations, Canadians are most likely to advise elected officials to not back down and stand up to the U.S. (35%). This was followed by the advice: to work on the relationship/keep the peace/cooperate (16%), remain fair/level headed (14%), and use this as an opportunity for Canada/make things better (11%).

In terms of U.S.-Canada relations, Americans are most likely to advise elected officials to work on the relationship/keep the peace and cooperate (46%). This was followed by the advice: to remain fair/level headed (16%), ensure fair deal for the U.S. (13%) and abolish the tariffs (13%).

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## D. Contract value

The contract value was \$162,720.00 including HST.

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For more information, contact Global Affairs Canada at [POR-ROP@international.gc.ca](mailto:POR-ROP@international.gc.ca)

## E. Political neutrality statement and contact information

This certification is to be submitted with the final report submitted to the Project Authority.

I hereby certify, as a Representative of Nanos Research, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Government of Canada's Policy on Communications and Federal Identity and Directive on the Management of Communications. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, party standings with the electorate, or ratings of the performance of a political party or its leaders.

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## About this report

This report begins with an executive summary outlining key findings and conclusions, followed by a detailed analysis of the quantitative results. Two detailed sets of “banner tables” is provided under separate cover; this presents results for all survey questions by key segments such as region, age, gender, income and education, etc. for both Canada and the U.S.

The quantitative results are expressed as percentages unless otherwise noted. The base size is the total sample of n=1532 Canadians and n=1870 Americans, unless otherwise specified. However, those who opted not to respond to a question are excluded.

Detailed findings are presented in the sections that follow. Overall results are presented in the main portion of the narrative and are typically supported by graphic or tabular presentation of results. Results for the proportion of respondents in the sample who either said “don’t know” or did not provide a response may not be indicated in the graphic representation of the results in all cases, particularly where they are not sizable (e.g., 10% or less). Net results cited in the text may not exactly match individual results shown in the charts due to rounding. Results may not add to 100% due to rounding or multiple responses.

For comparisons with the previous wave of data, tables with tracking data do not include those that say “don’t know/I have no opinion.”

The bullets under the charts also note any significant differences between sub-groups of respondents in different demographic groups.

Key demographic patterns of interest are described throughout the report, as follows: gender, age, province/territory or state, income, ethnicity, immigration status and education.

Only demographic differences that are significantly different are presented.

Details of the methodology and sample characteristics can be found in Appendix A. The final survey instrument can be found in Appendix B.



## Detailed findings

### A. Priority issues for Canadians and Americans

Canadians most often selected a lack of affordable housing (38%), healthcare (34%), disinformation (30%) and climate change (25%) as the issues that are a priority for them, and the top issues for Americans were disinformation (31%), healthcare (29%) and a lack of affordable housing (24%). Gun violence was much more frequently selected as a top priority by Americans (21%) compared to Canadians (4%), as was racism (Canada: 3%; U.S.: 13%), while Canadians are more likely to be concerned about climate change (25% compared to 17% of Americans).

Canadians were more likely to select increasing trade between Canada and the U.S. as a top issue (Canada: 16%; U.S.: 3%) or strengthening the security of the Canada-U.S. border (Canada: 13%; U.S.: 2%).

Of note, Americans are less likely to say gun violence is a top priority now (21%), compared to 2023 (33%). They are also less likely to say crime is a top priority now (16%), compared to 2023 (27%). There is an increase in those who note immigration as a top priority (23%, not mentioned in 2023), along with fentanyl (10%), not mentioned in 2023). Disinformation also saw an increase (31%, up from 24% in 2023).

*Q – Which do you think is a priority issue for you today? [RANDOMIZE][SELECT A MAX OF 3]*

**Table 1 – Priority Issues**

Issue	Canada (n=1532)*	U.S. (n=1867)*
Lack of affordable housing	38%	24%
Health care	34%	29%
Disinformation (false information) in the news	30%	31%
Climate change	26%	17%
Budget deficit	21%	15%
Misinformation (incorrect information) in the news	18%	22%
Immigration	18%	22%
Increasing trade between Canada and U.S./between the U.S. and Canada	16%	3%
Crime	14%	16%
Homelessness	14%	12%
Strengthening the security of the Canada-U.S. border/U.S.-Canada border	13%	2 %
Lack of good jobs	7%	10%
Gun violence	4%	21%
Fentanyl	4%	10%



Racism	3%	13%
Labor shortage	3%	1%
Terrorism	2%	7%
Other	18%	14%
Unsure	< 1%	1%

Base: Total sample, n=1,532 Canadians and n=1,867 Americans.

\*NOTE: Based on up to three mentions. Total may exceed 100%

**Table 2 – Priority Issues – U.S. Tracking [HAVE AN OPINION ONLY]**

Issue	2023 (n=3,183)*	2025 (n=1843)*
Health care	32%	29%
Lack of affordable housing	23%	24%
Gun violence	33%	21%
Racism	20%	13%
Crime	27%	16%
Labor shortage	7%	1%
Climate change	27%	17%
Budget deficit	19%	15%
Terrorism	11%	7%
Disinformation (false information) in the news	24%	31%
Misinformation (incorrect information) in the news	19%	22%
Homelessness	18%	12%
Lack of good jobs	9%	10%
Increasing trade between the U.S. and Canada	3%	3%
Strengthening the security of the U.S.-Canada border**	-	2%
Immigration**	-	23%
Fentanyl**	-	10%
Other	3%	12%

Base: Total sample, n=1843 Americans (excluding those that are unsure).

\*NOTE: Based on up to three mentions. Total may exceed 100%

\*\*NOTE: Response options added for the 2025 wave



## Significant demographic differences in terms of priority issues include:

### Canada

#### Region:

- Canadians from British Columbia are more likely to say “Lack of affordable housing” (44%) than those from Manitoba/Saskatchewan (26%). They are also more likely to say “Climate change” (36%) than those from Ontario (23%), Manitoba/Saskatchewan (17%) and Alberta (19%).
- Canadians from Manitoba/Saskatchewan are more likely to say “Crime” (31%) than those from Ontario (16%), Atlantic Canada (10%), Quebec (7%), and British Columbia (14%).
- Canadians from Manitoba/Saskatchewan are more likely to say “Fentanyl/drugs” (10%) than those from Ontario (3%) and Quebec (2%).
- Residents of Quebec (7%) and Ontario (6%) are more likely to say “Gun violence” than those from British Columbia (1%).
- Canadians from Quebec are more likely to say Disinformation (false information) in the news (36%) than those from Ontario (27%). They are also more likely to say “Labour shortage” (6%) than those from Ontario (2%).

#### Age:

- Canadians aged 55 plus are more likely to say the following are issues of priority:
  - Health care (40%) compared to those aged 35 to 54 (32%) and 18 to 34 (28%)
  - Disinformation (false information) in the news (33%) compared to those aged 35 to 54 (26%)
  - Strengthening the security of the Canada-U.S. border (16%) compared to those aged 18 to 34 (8%)
- Canadians aged 18 to 34 are more likely to say the following are issues of priority
  - Lack of affordable housing (47%) compared to those aged 35 to 54 (37%) and 55 plus (33%)
  - Immigration (20%) compared to those aged 55 plus (14%). Canadians aged 35 to 54 (21%) are also more likely than those aged 55 plus to say immigration is a priority issue for them

#### Gender:

- Women are more likely to say the following are issues of priority than men:
  - Health care (39% vs. 28%)
  - Lack of affordable housing (41% vs. 35%)
  - Strengthening the security of the Canada-U.S. border (15% vs. 11%)
- Men are more likely to say the following are issues of priority than women:
  - Crime (17% vs. 12%)
  - Budget deficit (27% vs. 15%)
  - Immigration (21% vs. 15%)





#### Education:

- Those who report having an education of high school or less (22%) or college/some university (17%) are more likely to say “Crime” than those who report having a bachelor’s degree or more (12%).
- Canadians who report having a bachelor’s degree or more are more likely to say “Climate change” (31%) than those who have a high school diploma or less (11%) or those who report going to college or some university (20%).

#### Income:

- Those who report being in the income brackets of \$60,000 to \$100,000 (21%) and over \$100,000 (25%) are more likely to say “Budget deficit” than those that report having an income under \$40,000 and \$40,000 to \$60,000 (10% each).
- Canadians who report having an income over \$100,000 (19%), between \$60,000 and \$100,000 (18%) and between \$40,000 and \$60,000 (22%) are more likely to say “Immigration” than those who report an income under \$40,000 (7%).

#### United States

##### Region:

- Americans from the South are more likely to say “Lack of affordable housing” (27%) and “Fentanyl” (12%) than those from the Midwest (19% and 7%, respectively). Americans from the South (24%) are also more likely to say “Gun violence” than those from the West (15%). They are more likely to say “Racism” (17%) than those from the Northeast (9%) and the West (10%).
- Americans from the Northeast (18%), Midwest (18%) and West (24%) are more likely to say “Climate change” than those from the South (11%).
- Americans from the West are more likely to say “Homelessness” (18%) than those from the Midwest (8%) and the South (9%). They are also more likely to say “Increasing trade between the U.S. and Canada” (5%) than those from the South (2%).

##### Age:

- Americans aged 18 to 34 are more likely to say “Lack of affordable housing” (41%) and “Lack of good jobs” (18%) than those aged 35 to 54 (25% and 12%, respectively) and 55 plus (14% and 4%, respectively). Americans aged 18 to 34 (21%) are also more likely to say “Climate change” than older Americans aged 55 plus (14%).
- Americans aged 34 to 55 (37%) and 55 plus (32%) are more likely to say “Disinformation (false information) in the news” compared to Americans aged 18 to 34 (20%).
- Americans aged 34 to 55 (23%) and 55 plus (27%) are more likely to say “Immigration” compared to Americans aged 18 to 34 (14%).
- Americans aged 55 plus are more likely to say “Terrorism” (11%) than those aged 18 to 24 (3%) and 35 to 54 (4%). They are also more likely to say “Budget deficit” (18%) and “Crime” (18%) than those aged 18 to 34 (12% for both issues).



## Gender:

- Americans who identify as female are more likely than men to select the following as top issues:
  - Health care (32% vs. 26%)
  - Lack of affordable housing (27% vs. 21%)
  - Gun violence (26% vs. 15%)
  - Racism (16% vs. 10%)
- Americans who identify as male are more likely than women to select the following as top issues:
  - Budget deficit (18% vs. 13%)
  - Disinformation (false information) in the news (33% vs. 28%)
  - Misinformation (incorrect information) in the news (27% vs. 17%)
  - Immigration (25% vs. 20%)

## Education:

- Americans who report having high school or equivalent education are more likely to say the following than those with a bachelor's degree or more:
  - Lack of affordable housing (27% vs. 19%), and those with some college/associate's degree are also more likely to say this (26%) than those with a bachelor's degree or more.
  - Homelessness (13% vs. 9%), and those with some college/associate's degree are also more likely to say this (14%) than those with a bachelor's degree or more.
  - Lack of good jobs (14% vs. 6%)
  - Immigration (25% vs. 19%)
  - Fentanyl (15% vs. 6%), and those with some college/associate's degree are also more likely to say this (11%) than those with a bachelor's degree or more.
- Americans who report having high school or equivalent education are also more likely to say "Gun violence" (24%) compared to those with some college/associate's degree (17%).
- Americans who report having some college/associate's degree are more likely to say "Crime" (19%) compared to those with a bachelor's degree or more (13%).
- Americans who report having a bachelor's degree or more are more likely to say the following than those with a high school degree or equivalent:
  - Climate change (25% compared to 10% for those with a high school or equivalent education). They are also more likely to say this than those who report having some college/associate's degree (13%).
  - Budget deficit (19% vs. 11%)
  - Disinformation (false information) in the news (37% vs. 24%)
  - Misinformation (incorrect information) in the news (25% vs. 18%)
  - President Trump and U.S. administration (6% vs. 1%). They are also more likely to say this than those who report having some college/associate's degree (3%).



## Income:

- Americans making less than \$30,000 (33%) and between \$30,000 and \$60,000 (30%) are more likely to say “Lack of affordable housing” compared to those making between \$60,000 and \$100,000 (17%) and over \$100,000 (19%).
- Americans making less than \$30,000 (16%) and between \$30,000 and \$60,000 (12%) are more likely to say “Fentanyl” compared to those making over \$100,000 (7%). Lower income Americans making less than \$30,000 are also more likely to say this compared to those making between \$60,000 and \$100,000 (8%).
- Americans making less than \$30,000 (14%) and between \$30,000 and \$60,000 (12%) are more likely to say “Lack of good jobs” compared to those making between \$60,000 and \$100,000 (6%). Lower income Americans making less than \$30,000 are also more likely to say this compared to those making \$100,000 or more (8%).
- Lower income Americans making less than \$30,000 are more likely to say “Homelessness” compared to those making \$100,000 or more (9%).
- Americans making between \$30,000 and \$60,000 (24%) are more likely to say “Gun violence” compared to those making between \$60,000 and \$100,000 (16%).
- All income groups are more likely to say Misinformation (incorrect information) in the news (between 23% and 25%) than those with an income under \$30,000 (13%).
- Those making between \$60,000 and \$100,000 (19%) and over \$100,000 (21%) are more likely to say “Climate change” than those making less than \$30,000 and between \$30,000 and \$60,000 (12% each).
- Those making between \$60,000 and \$100,000 and over \$100,000 (37% each) are more likely to say “Disinformation (false information) in the news” than those making less than \$30,000 (19%) and between \$30,000 and \$60,000 (26%).

## Immigration status:

- Those born in the United States are more likely to say the following are priority issues than those born outside the United States:
  - Climate change (18% vs. 9%)
  - Homelessness (13% vs. 3%)
  - Fentanyl (10% vs. 4%)
  - President Trump and U.S. administration (4% vs less than 1%)
- Those not born in the United States are more likely to say the following are priority issues than those born in the United States:
  - Gun violence (28% vs. 20%)
  - Disinformation (false information) in the news (41% vs. 31%)
  - Lack of good jobs (16% vs. 9%)
  - Strengthening the security of the U.S.-Canada border (8% vs. 2%)
  - Tariffs/trades (4% vs. less than 1%)



## B. General trade

### Closer trading relationship with other countries

Both Canadians and Americans would be most supportive of their country having a closer trading relationship with another country if its goods are most competitively priced on the global market (Canada: 86% much more likely/somewhat more likely to support; U.S.: 78%) or if its goods have less impact on the environment than another trading partner (Canada: 76%; U.S.: 69%). Three in five Canadians would be more supportive of Canada having a closer relationship with another country if its goods came from a close neighbour of Canada (60%), while seven in ten Americans say the same about goods from a close U.S. neighbour (68%). Just over one in two Canadians and Americans each would be swayed by its workers being part of the same labour union as their workers (Canada: 54%; U.S.: 53%).

*Q – How likely would you support Canada/the United States having a closer trading relationship with another country if...[RANDOMIZE]*

**Table 3.1 – Support for Canada/the U.S. Having a Closer Trading Relationship with Other Countries – NET MORE LIKELY**

<b>Much more likely/Somewhat more likely</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1861)</b>
...its goods are the most competitively priced on the global market?	86%	78%
...its goods have less impact on the environment than another trading partner?	76%	69%
...its goods come from a close neighbour of Canada/the U.S. instead of from far away or overseas?	60%	68%
...its workers are part of the same labour unions as Canadian/American workers?	54%	53%

*Base: All Canadian respondents, n=1532 and all American respondents, n=1861.*



*Q – How likely would you support Canada having a closer trading relationship with another country if...[RANDOMIZE]*

**Table 3.2 – Support for Canada Having a Closer Trading Relationship with Other Countries**

Statements (n=1532)	...its workers are part of the same labour unions as Canadian workers?	...its goods come from a close neighbour of Canada instead of from far away or overseas?	...its goods have less impact on the environment than another trading partner?	...its goods are the most competitively priced on the global market?
Much more likely	20%	21%	38%	44%
Somewhat more likely	34%	39%	39%	43%
Somewhat less likely	8%	12%	7%	4%
Much less likely	9%	9%	5%	2%
Don't know/no opinion	29%	20%	12%	8%
<b>NET More likely</b>	<b>54%</b>	<b>60%</b>	<b>76%</b>	<b>86%</b>

*Base: All Canadian respondents, n=1532.*

*Q – How likely would you support the United States having a closer trading relationship with another country if...[RANDOMIZE]*

**Table 3.3 – Support for the U.S. Having a Closer Trading Relationship with Other Countries**

Statements (n=1861)	...its workers are part of the same labour unions as American workers?	...its goods come from a close neighbour of the U.S. instead of from far away or overseas?	...its goods have less impact on the environment than another trading partner?	...its goods are the most competitively priced on the global market?
Much more likely	17%	24%	30%	33%
Somewhat more likely	35%	44%	39%	45%
Somewhat less likely	8%	7%	8%	6%
Much less likely	6%	2%	4%	2%
Don't know/no opinion	34%	23%	19%	14%
<b>NET More likely</b>	<b>53%</b>	<b>68%</b>	<b>69%</b>	<b>78%</b>

*Base: All American respondents, n=1861.*



**Table 3.4 – Support for the U.S. Having a Closer Trading Relationship with Other Countries - TRACKING  
[HAVE AN OPINION ONLY]**

<b>Much more likely/Somewhat more likely</b>	<b>2023 (n=3183)</b>	<b>2025 (n=1626)</b>
...its workers are part of the same labour unions as American workers?	79%	79%
...its goods come from a close neighbour of the U.S. instead of from far away or overseas?*	91%	89%
...its goods have less impact on the environment than another trading partner?**	87%	85%
...its goods are the most competitively priced on the global market?	88%	90%

*Base: All American respondents, n=1626 [HAVE AN OPINION ONLY].*

*\*2023 question wording: ...goods came from closer to the U.S. instead of from far away or overseas?*

*\*\*2023 question wording: ...goods were better for the environment than another trading partner?*

## **Canada**

**Net likelihood (much more likely/somewhat more likely) of supporting closer trading ties with another country is higher among the following subgroups if:**

### **Its workers are part of the same labour unions as Canadian workers**

- Residents of Ontario (59%) compared to Alberta (46%).
- Women (57%) compared to men (51%).
- Those with a household income of \$60,000 to \$100,000 (59%) compared to those with a household income of \$100,000 or more (50%).

### **Its goods come from a close neighbour of Canada instead of from far away or overseas**

- No significant demographic differences.

### **Its goods have less impact on the environment than another trading partner**

- Residents of Quebec (81%) and British Columbia (83%) compared to Atlantic Canada (68%), Manitoba/Saskatchewan (67%), and Alberta (68%).
- Women (81%) compared to men (72%).
- Those with a bachelor's degree or more education (81%) compared to those with college-level education or some university (73%) or high school or less (65%).



### **Its goods are the most competitively priced on the global market**

- No significant demographic differences.

### **U.S.:**

**Net likelihood (much more likely/somewhat more likely) of supporting closer trading ties with another country is higher among the following subgroups if:**

### **Its workers are part of the same labour unions as American workers**

- Americans from the Northeast (57%), the Midwest (56%) and the West (56%) compared to the South (47%).
- Americans aged 18 to 34 (59%) compared to those aged 55 plus (48%).
- Those with an income of \$30,000 to \$60,000 (56%) compared to those with less than \$30,000 (48%).

### **Its goods come from a close neighbour of the U.S. instead of from far away or overseas**

- Americans from the Midwest (74%) compared to Americans from the South (65%).
- Those with a bachelor's degree or more (71%) compared to some college/associate's degree (64%).

### **Its goods have less impact on the environment than another trading partner**

- Women (72%) compared to men (66%).
- Americans aged 18 to 34 (76%) compared to those aged 55 plus (65%).
- Those with a bachelor's degree or more (75%) compared to some college/associate's degree (64%) and high school or equivalent (67%).
- Those with an income of \$100,000 or more (74%) compared to less than \$30,000 (63%).

### **Its goods are the most competitively priced on the global market**

- Americans from the Northeast (84%) compared to the South (75%) and the West (77%).
- Men (83%) compared to women (73%).
- Americans aged 55 plus (80%) compared to those aged 18 to 34 (73%).
- Those born in the U.S. (79%) compared to outside the U.S. (69%).
- Those with a bachelor's degree or more (84%) compared to some college/associate's degree (77%) and high school or equivalent (71%).
- Those with an income higher than \$100,000 (84%) compared to less than \$30,000 (66%).

### **Canada and U.S. trade relationship**

A majority of both Canadians and Americans strongly or somewhat agree that trade between the two countries provides their country with economic benefits (Canada: 82%; U.S.: 83%). Canadians are more than twice as likely to agree that Canada periodically needs to impose tariffs on U.S. imports to protect Canadian national security than Americans are to agree with the reverse (Canada: 64%; U.S.: 31%). Additionally, Americans are much more likely to agree that Canada is their most secure and reliable



trading partner than Canadians are to agree with the same statement about the U.S. (Canada: 35%; U.S.: 67%).

Americans with an opinion are now less likely to agree (37%) that the U.S. periodically needs to impose tariffs on imports from Canada to protect American national security than in the 2023 wave of research (53%).

Canadians are significantly more likely to say the Canada-U.S. trade impact has a negative (67%) rather than a positive impact (13%) on the Canadian economy, while Americans are divided in terms of how they think the relationship impacts the U.S. economy, with about three in ten each who say there is a negative (30%), positive (30%) or no impact (32%).

Additionally, a significant majority of Canadians say they are concerned about the current Canada-U.S. trade relationship (83%), while just over one in two Americans say the same (53%).

Asked what specific concerns they have about the current Canada-U.S. trade relationship, Canadians are most concerned about increase in costs/prices (15%) and confusion/instability/irrational decisions (14%). Americans are most concerned about loss of friendly relationship/ally (17%) and increase in costs/prices (16%). Of note, 17% of Americans have no concerns (compared to 1% of Canadians).

Top perceived benefits for Canada from the current Canada-U.S. trade relationship are being in close proximity/nearby/convenient (14%), the relationship being mutually beneficial for Canada and the U.S. (11%), the U.S. buying Canadian goods and products/resources/big market (10%) and finding a new trade relationship/allies (9%). Of note, 16% say there are no benefits.

For Americans, the top perceived benefits of the current Canada-U.S. trade relationship are having a friendly relationship/allies (12%), the relationship being mutually beneficial/buy each other's goods and products (11%), access to more resources/products (10%) and lower prices/cheaper costs (9%). Of note, 18% of Americans say there are no benefits.

Regarding downsides to Canada in terms of the current Canada-U.S. trade relationship, Canadians most often mention overreliance on the U.S. as a downside of the current trade relationship (25%), followed by instability/continual changes/uncertainty (19%) and increase in costs/prices (15%). On the other hand, Americans are most likely to say there is an increase in costs/prices (18%), followed by loss of friendly relationship/ally (13%) and negative impact on the U.S. economy/businesses/suppliers (10%). Of note, 16% of Americans say there are no downsides.





Q – Do you agree or disagree with the following statements? [RANDOMIZE]

**Table 4.1 – Agreement with Statements about Canada/U.S. Trade Relationship – NET AGREE**

<b>Strongly/Somewhat agree</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1868)</b>
Trade between Canada and the U.S. provides economic benefits to Canada/Trade between the U.S. and Canada provides economic benefits to the U.S.	82%	83%
Canada periodically needs to impose tariffs on imports from the U.S. to protect Canadian national security/The U.S. periodically needs to impose tariffs on imports from Canada to protect American national security	64%	31%
The U.S. is Canada's most secure and reliable trading partner/Canada is America's most secure and reliable trading partner	35%	67%

Base: All Canadian respondents, n=1532 and all American respondents, n=1868.

**Table 4.2 – Agreement with Statements about Canada/U.S. Trade Relationship – Canada Only**

Statements (n=1532)	The U.S. is Canada's most secure and reliable trading partner	Trade between Canada and the U.S. provides economic benefits to Canada	Canada periodically needs to impose tariffs on imports from the U.S. to protect Canadian national security
Strongly agree	17%	46%	34%
Somewhat agree	18%	37%	30%
Somewhat disagree	23%	8%	15%
Strongly disagree	39%	7%	11%
Don't know/no opinion	2%	2%	9%
<b>NET Agree</b>	<b>35%</b>	<b>82%</b>	<b>64%</b>

Base: All Canadian respondents, n=1532.

**Table 4.3 – Agreement with Statements about Canada/U.S. Trade Relationship – U.S. Only**

Statements (n=1868)	Canada is America's most secure and reliable trading partner	Trade between the U.S. and Canada provides economic benefits to the U.S.	The U.S. periodically needs to impose tariffs on imports from Canada to protect American national security
Strongly agree	35%	49%	9%
Somewhat agree	33%	34%	22%
Somewhat disagree	11%	6%	23%
Strongly disagree	2%	2%	31%
Don't know/no opinion	19%	9%	16%
<b>NET Agree</b>	<b>67%</b>	<b>83%</b>	<b>31%</b>

Base: All American respondents, n=1868.



**Table 4.4 – Agreement with Statements about Canada/U.S. Trade Relationship – U.S. TRACKING  
[HAVE AN OPINION ONLY]**

<b>Strongly/Somewhat agree</b>	<b>2023 (n=3183)</b>	<b>2025 (n=1626)</b>
Canada is America's most secure and reliable trading partner	80%	83%
The U.S. periodically needs to impose tariffs on imports from Canada to protect American national security	53%	37%

*Base: All American respondents, n=1626 [HAVE AN OPINION ONLY].*

#### **Canada:**

**Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:**

#### **The U.S. is Canada's most secure and reliable trading partner**

- Residents of Manitoba/Saskatchewan (47%) and Alberta (47%) compared to residents of Quebec and British Columbia (28% each).
- Men (41%) compared to women (30%).
- Canadians aged 18 to 34 (42%) and 35 to 54 (39%) compared to those aged 55 plus (27%).
- Those with an income of \$100,000 or more (38%) compared to under \$40,000 (27%).
- Those with an education of high school or less (44%) compared to those with a bachelor's degree or more (32%).

#### **Trade between Canada and the U.S. provides economic benefits to Canada**

- Residents of Ontario (87%), Manitoba/Saskatchewan (85%), Alberta (83%), British Columbia and Atlantic Canada (82%) compared to Quebec (72%).
- Men (88%) compared to women (77%).
- Canadians aged 35 to 54 (87%) compared to those aged 55 plus (79%).
- Incomes of \$100,000 (87%) or more compared to incomes under \$40,000 (67%) and \$40,000 to \$60,000 (75%).

#### **Canada periodically needs to impose tariffs on imports from the U.S. to protect Canadian national security**

- Residents of British Columbia (68%) and Ontario (67%) compared to residents of Alberta (55%).
- Women (68%) compared to men (60%).
- Canadians aged 55 plus (68%) compared to those aged 18 to 34 (61%).



## U.S.:

**Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:**

### **Canada is America's most secure and reliable trading partner**

- Men (73%) compared to women (62%).
- Americans aged 55 plus (74%) compared to those aged 35 to 54 (62%) and 18 to 34 (63%).
- Those with a bachelor's degree or more (72%) compared to high school or equivalent (61%).
- Those with an income of \$100,000 or more (74%) compared to less than \$30,000 (59%).

### **Trade between the U.S. and Canada provides economic benefits to the U.S.**

- Those with a bachelor's degree or more (88%) compared to high school or equivalent (76%).
- Those with an income of \$100,000 or more (90%) compared to less than \$30,000 (71%).

### **The U.S. periodically needs to impose tariffs on imports from Canada to protect U.S. national security**

- Men (35%) compared to women (27%).
- Americans aged 55 plus (37%) compared to those aged 35 to 54 (30%) and 18 to 34 (20%).

*[CANADA] Q – On a scale from 0 to 10, where 0 is a very negative impact and 10 is a very positive impact, what level of impact do you think the current Canada-U.S. trade relationship has on the Canadian economy?*

*[U.S.] Q – On a scale from 0 to 10, where 0 is a very negative impact and 10 is a very positive impact, what level of impact do you think the current U.S.-Canada trade relationship has on the U.S. economy?*

**Table 5 – Impact of Current Canada-U.S. Trade Relationship on Economy**

Impact	Canada (n=1532)	U.S. (n=1865)
Mean	2.9	4.9
Negative impact (0-3)	67%	30%
Neutral (4-6)	19%	32%
Positive impact (7-10)	13%	30%
I don't know/I have no opinion	1%	8%

*Base: All Canadian respondents, n=1532 and American respondents, n=1865.*

## **Canada:**

**Net positive impact is higher among the following subgroups:**

- No significant differences between subgroups.


**United States:**
**Net positive impact is higher among the following subgroups:**

- Residents of the Northeast (36%) and the Midwest (34%) compared to the South (28%).
- Men (33%) compared to women (27%).

*[CANADA] Q – On a scale from 0 to 10, where 0 is not concerned at all and 10 is a very concerned, how concerned or not concerned are you about the current Canada-U.S. trade relationship?*

*[U.S.] Q – On a scale from 0 to 10, where 0 is not concerned at all and 10 is a very concerned, how concerned or not concerned are you about the current U.S.-Canada trade relationship?*

**Table 6 – Concern About Current Canada-U.S. Trade Relationship**

Concern	Canada (n=1532)	U.S. (n=1864)
Mean	8.3	6.6
Not concerned (0-3)	5%	17%
Neutral (4-6)	12%	26%
Very concerned (7-10)	83%	53%
I don't know/I have no opinion	<1%	4%

*Base: All Canadian respondents, n=1532 and American respondents, n=1864.*

**Canada:**
**Net concern is higher among the following subgroups:**

- No significant differences between subgroups.

**United States:**
**Net concern is higher among the following subgroups:**

- Residents of the West (58%) compared to those from the South (50%).
- Education of a bachelor's degree (63%) compared to some college or an associate's degree (52%) or high school (41%).
- Income over \$100,000 (63%) compared to between \$60,000 and \$100,000 (54%), \$40,000 and \$60,000 (48%) and under \$40,000 (41%).



Q – What specific concerns do you have about the current Canada-U.S. trade relationship, if any? [OPEN]

**Table 7.1 – Specific Concerns About Current Canada-U.S. Trade Relationship (Canada)**

Concern	Canada (n=1428)
Increase in costs/prices	15%
Confusion/instability/irrational decisions	14%
Trade war/tariffs/economic warfare	10%
Loss of jobs	10%
Negative impact of tariffs on Canadian economy/businesses/suppliers	9%
Too reliant on U.S./U.S. products	8%
Annexation/war/aggression	8%
Loss of respect for U.S./negative perceptions of U.S.	6%
Loss of friendly relationship/ally	4%
Lack of control/depends on U.S. administration	3%
Misinformation/disinformation on trade relationship	3%
Negative impact on supply chain/availability of products	2%
Potential retaliation against Canada	1%
None/no concerns	1%
Other	7%
No Comment	1%



**Table 7.2 – Specific Concerns About Current Canada-U.S. Trade Relationship (U.S.)**

<b>Concern</b>	<b>U.S. (n=1446)</b>
None/no concerns	17%
Loss of friendly relationship/ally	17%
Increase in costs/prices	16%
Tariffs	11%
U.S. administration/impact of administration	7%
We rely on Canada/need their products and business	4%
Negative impact on U.S. economy/businesses/suppliers	5%
Negative impact on U.S. image/perceptions of U.S.	3%
Potential retaliation	3%
Negative impact on supply chain/availability of products	3%
Other	13%
Not Sure	3%

*Base: All Canadian respondents, n=1428 and American respondents, n=1446.*

#### **Canada:**

##### **Key demographic differences:**

- Residents of Quebec (22%) are more likely to say “Increase in costs/prices” than those from Ontario (11%) and British Columbia (9%).
- Canadians from Atlantic Canada (15%) are more likely to say “Too reliant on U.S./U.S. products” compared to those from Ontario (6%).
- Those from Ontario (12%) are more likely to say “Loss of jobs” than those from Alberta (3%).
- Canadians aged 18 to 34 (21%) are more likely to say “Increase in costs/prices” compared to those aged 55 plus (11%).
- Canadians aged 55 plus are more likely to say, “Loss of respect for U.S./negative perceptions of U.S.” (9%) compared to those aged 18 to 34 (2%) and 35 to 54 (4%).

#### **United States:**

##### **Key demographic differences:**

- Americans in the South (22%) are more likely to say “None/no concerns” than those in the Midwest (14%) and in the West (12%).
- Men (13%) are more likely than women (9%) to say “Tariffs.” Men (8%) are also more likely to say “U.S. administration/impact of U.S. administration” compared to women (5%).
- Women (19%) are more likely to say “Increase in costs/prices” than men (13%).
- Americans aged 18 to 34 (23%) are more likely to say “Increase in costs/prices” than those aged 55 plus (13%).



- Americans aged 55 plus are more likely to say “Tariffs” (13%) compared to those aged 34 to 55 (7%).
- Americans aged 55 plus are more likely to say “We rely on Canada/need their products and business” (5%) compared to those aged 18 to 34 (2%).
- Those born outside the US (28%) are more likely to say “Increase in costs/prices” compared to those born in the US (15%). They are also more likely to say “Negative impact on U.S. economy/businesses/suppliers” (13% compared to 5%) and “We rely on Canada/need their products and business” (9% compared to 4%).
- Those born in the US (18%) are more likely to say “None/no concerns” compared to those born outside the US (9%).
- Americans holding a bachelor’s degree or more (23%) and those who have some college/associate’s degree (18%) are more likely to say “Loss of friendly relationship/ally” than those with a high school education (8%).
- Those with a high school education are more likely to say “Increase in costs/prices” (20%) than those with a bachelor’s degree or more (13%).
- Those with a high school education (28%) are more likely to say “None/no concerns” compared to those with some college/associate’s degree (17%) and those with a bachelor’s degree or more (9%). Those with some college/associate’s degree are also more likely to say this than those with a bachelor’s degree or more.
- Reported incomes under \$30,000 are more likely to say “Increase in costs/prices” (22%) than those making \$100,000 or more (12%).
- Reported incomes over \$100,000 (24%) or between \$60,000 and \$100,000 (17%) are more likely to say “Loss of friendly relationship/ally” than those making under \$30,000 (8%). Reported incomes over \$100,000 are also more likely to say this than those making between \$60,000 and \$100,000.





[CANADA] Q – What are the benefits to Canada in terms of the current Canada-U.S. trade relationship, if any? [OPEN]

[U.S.] Q – What are the benefits to the U.S. in terms of the current U.S.-Canada trade relationship, if any? [OPEN]

**Table 8.1 – Benefits From Current Canada-U.S. Trade Relationship (Canada)**

<b>Benefit</b>	<b>Canada (n=1397)</b>
None/no benefits	16%
Close proximity/near by/convenient	14%
Mutually beneficial for Canada and U.S.	11%
U.S. buys our goods and products/resources/large market	10%
Finding new trade relationships/allies	9%
United Canadians/brought us together	5%
Leading to increased interprovincial trade	5%
Buying more local products/goods	4%
Lower prices/cheaper costs	3%
Other	19%
Not Sure	3%
No Comment	2%

**Table 8.2 – Benefits From Current Canada-U.S. Trade Relationship (U.S.)**

<b>Benefit</b>	<b>U.S. (n=1336)</b>
None/no benefits	19%
Friendly relationship/allies	12%
Mutually beneficial/buy each others' goods and products	11%
Access to more resources/products	10%
Lower prices/cheaper costs	9%
Close proximity/near by/convenient	8%
Tourism/benefits U.S. cities	1%
Other	15%
Not Sure	14%

Base: All Canadian respondents, n=1397 and American respondents, n=1336.

**Canada:****Key demographic differences:**

- Residents of Quebec (25%) are more likely to say “Close proximity/near by/convenient” than those from Ontario (8%) and British Columbia (11%).
- Residents of Ontario (13%) and British Columbia (15%) are more likely to say “Mutually beneficial for Canada and U.S.” than those from Quebec (6%).
- Residents of Atlantic Canada (13%), Ontario (11%) and British Columbia (11%) are more likely to say “Finding new trade relationships/allies” than those from Quebec (4%).
- Residents of Ontario and British Columbia (7% each) are more likely to say “Leading to increased interprovincial trade” than those from Quebec (1%).
- Women (18%) are more likely to say “None/no benefits” than men (14%).
- Men (12%) are more likely to say “U.S. buys our goods and products/resources/large market” than women (8%).
- Canadians aged 55 plus (20%) are more likely to say “None/no benefits” than those aged 35 to 54 and 18 to 34 (13% each).
- Those aged 35 to 54 (13%) are more likely to say “Mutually beneficial for Canada and U.S.” than those aged 18 to 34 (7%).
- Canadians with high school or less education (25%) are more likely to say “None/no benefits” than those with a bachelor’s degree or more education (13%).
- Those with a bachelor’s degree or more education (12%) are more likely to say “U.S. buys our goods and products/resources/large market” than those with high school education or less (3%).

**United States:****Key demographic differences:**

- Americans from the Northeast (15%) are more likely to say “Access to more resources/products” than those from the South (8%).
- Americans from the West (12%) are more likely to say “Close proximity/near by/convenient” than those from the South (6%).
- Men (21%) are more likely to say “None/no benefits” than women (16%).
- Americans aged 35 to 54 are more likely to say “Access to more resources/products” (15%) than those aged 18 to 34 and 55 plus (8% each).
- Americans aged 55 plus are more likely to say “None/no benefits” (22%) than those aged 35 to 54 (13%).
- Those born outside the US (24%) are more likely to say “Access to more resources/products” than those born in the US (9%).
- Those born in the US (10%) are more likely to say “Lower prices/cheaper costs” than those born outside the US (3%).
- Americans with a bachelor’s degree or more (15%) and those with some college or an associate’s degree (9%) are more likely to say “Access to more resources/products” than those with high school education or less (5%).
- Americans with an income of \$100,000 or more (13%) are more likely to say “Access to more resources/products” than those with an income under \$30,000 (5%).



*[CANADA] Q – What are the downsides to Canada in terms of the current Canada-U.S. trade relationship, if any? [OPEN]*

*[U.S.] Q – What are the downsides to the U.S. in terms of the current U.S.-Canada trade relationship, if any? [OPEN]*

**Table 9.1 – Downsides From Current Canada-U.S. Trade Relationship (Canada)**

<b>Downside</b>	<b>Canada (n=1408)</b>
Overreliance on U.S.	25%
Instability/continual changes/uncertainty	19%
Increase in costs/prices	15%
Negative impact on Canadian economy/businesses/suppliers	12%
Job losses	8%
Loss of friendly relationship/ally	3%
None/no downsides	2%
Loss of goods/products	1%
Other	13%
Not Sure	1%
No Comment	1%

**Table 9.2 – Downsides From Current Canada-U.S. Trade Relationship (U.S.)**

<b>Downside</b>	<b>U.S. (n=1278)</b>
None/no downsides	16%
Increase in costs/prices	18%
Loss of friendly relationship/ally	13%
Negative impact on U.S. economy/businesses/suppliers	10%
Trade imbalance/deficit	6%
Negative impact on U.S. image/perceptions of U.S.	5%
Potential retaliation	3%
Loss of tourism/hurts U.S. cities	3%
Loss of goods/products	2%
Other	11%
Not sure	15%

*Base: All Canadian respondents, n=1408 and American respondents, n=1278.*

**Canada:****Key demographic differences:**

- Men (30%) are more likely to say “Overreliance on U.S.” compared to women (19%).
- Women (22%) are more likely to say “Instability/continual changes/uncertainty” than men (17%). They are also more likely to say “Increase in costs/prices” (17%) compared to men (13%).
- Canadians aged 18 to 34 (30%) and 35 to 54 (26%) are more likely to say “Overreliance on U.S.” compared to those aged 55 plus (20%).
- Canadians aged 55 plus (14%) and 34 to 55 (13%) are more likely to say “Negative impact on Canadian economy/businesses/suppliers” compared to those aged 18 to 34 (8%).
- Those with household incomes of \$100,000 or more (27%) are more likely to say “Overreliance on U.S.” compared to those who make under \$40,000 (10%).
- Canadians with household incomes under \$40,000 (24%) are more likely to say “Increase in costs/prices” than those with incomes of \$100,000 or more (13%).
- Canadians with a bachelor’s degree or more (28%) are more likely to say “Overreliance on U.S.” compared to those with college/some university (21%) and those with high school education or less (11%).
- Those with a bachelor’s degree or more (23%) are more likely to say “Instability/continual changes/uncertainty” compared to those with high school education or less (9%).

**United States:****Key demographic differences:**

- American men (20%) are more likely to say “None/no downsides” compared to women (13%). They are also more likely to say “Negative impact on U.S. economy/businesses/suppliers” (13%) than women (8%).
- Americans born in the US (13%) are more likely to say “Loss of friendly relationship/ally” than those born outside the US (5%).
- Those born outside the US (18%) are more likely to say “Negative impact on U.S. economy/businesses/suppliers” than those born in the US (10%).
- Americans with a bachelor’s degree or more (17%) are more likely to say “Loss of friendly relationship/ally” than those with high school or equivalent education (8%). Of note, those with high school education or less are more likely to say they are not sure (24%) compared to those with some college/associate’s degree (14%) or a bachelor’s or more education (8%).



## C. Tariffs

### Support for imposing tariffs

Canadians are close to four times more likely to support Canada imposing retaliatory tariffs on U.S. goods (72%) than Americans are to support the U.S. imposing tariffs on Canadian goods (20%). One in two Americans oppose imposing tariffs (51%), while just over one in ten oppose imposing retaliatory tariffs (12%).

*[CANADA] Q – On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose Canada imposing retaliatory tariffs on U.S. goods?*

*[U.S.] Q – On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose the U.S. imposing tariffs on Canadian goods?*

**Table 10 – Support for Imposing Tariffs/Retaliatory Tariffs on Canada or U.S. Goods**

Support	Canada (n=1532)	U.S. (n=1867)
Mean	7.7	3.5
Oppose (0-3)	12%	51%
Neutral (4-6)	14%	22%
Support (7-10)	72%	20%
I don't know/I have no opinion	2%	7%

*Base: All Canadian respondents, n=1532 and American respondents, n=1867.*

Among Canadian respondents, support for imposing tariffs/retaliatory tariffs on American goods is higher among the following subgroups:

- Women (77% support (7-10); mean score of 8.0 out of 10) compared to men (67% support (7-10); mean score of 7.3 out of 10).
- Those aged 55 plus (77% support (7-10); mean score of 8.1 out of 10) compared to those aged 18 to 34 (66% support (7-10); mean score of 7.4 out of 10).

Among American respondents, support for imposing tariffs/retaliatory tariffs on Canadian goods is higher among the following subgroups:

- Men (24% support (7-10); mean score of 3.5 out of 10) compared to women (16% support (7-10); mean score of 3.4 out of 10).
- Those aged 55 plus (23% support (7-10); mean score of 3.8 out of 10) compared to those aged 18 to 34 (13% support (7-10); mean score of 2.8 out of 10).



### Views on trade and tariffs between Canada and the U.S.

Both Canadians and Americans are much more likely to disagree (score of 0-3 out of 10) rather than agree (score of 7-10 out of 10) that Canada should become part of the U.S. (Canada: 88% disagree ; U.S.: 71% disagree), that Canada “owes” the U.S. (Canada: 84% disagree; U.S.: 59% disagree) and that the U.S. subsidizes Canada (Canada: 78% disagree; U.S.: 36% disagree).

A similar proportion of both Canadians and Americans agree that they will have to pay more for things like groceries and gas if tariffs are imposed on Canada by the U.S. or vice versa (Canada: 69% agree; U.S.: 58% agree), and that free trade between the two countries has lowered the cost of goods for consumers in their country (Canada: 55% agree; U.S.: 43% agree).

Canadians have a relatively higher level of trust than Americans in their federal government (Canada: 49% agree; U.S.: 14% agree) or mainstream media (Canada: 44% agree; U.S.: 16% agree) to provide accurate information on Canada-U.S. relations, while both have a similarly low level of trust in social media (Canada: 8% agree; U.S.: 5% agree).

*Q – On a scale from 0 to 10, where 0 is completely disagree and 10 is completely agree, to what extent do you agree or disagree with the following statements? [RANDOMIZE]*

**Table 11.1 – Views on Trade and Tariffs Between Canada and the U.S. – Mean Scores**

Mean (0-10)	Canada (n=1532)	U.S. (n=1863)
I will have to pay more for things like groceries and gas if tariffs are imposed on the U.S. by Canada/on Canada by the U.S.	7.6	7.2
Free trade between Canada and the U.S. has lowered the cost of goods for Canadian consumers/American consumers	6.6	6.4
I trust the federal government to provide me with accurate information about Canada-U.S. relations	5.7	3.0
I trust mainstream media to provide me with accurate information about Canada-U.S. relations	5.3	3.2
I am worse off today compared to 4 years ago	5.1	5.2
Free trade between Canada and the U.S. has cost Canada jobs/U.S. jobs	4.0	3.6
I trust social media to provide me with accurate information about Canada-U.S. relations	2.2	2.1
The U.S. subsidizes Canada	1.6	3.6
Canada “owes” the U.S.	1.2	2.5
Canada should become part of the U.S.	0.8	1.8

*Base: All Canadian respondents, n=1532 and American respondents, n=1863.*

**Table 11.2 – Views on Trade and Tariffs Between Canada and the U.S. – Canada**

Statement	Mean	Disagree (0-3)	Neither agree nor disagree (4-6)	Agree (7-10)	I don't know/I have no opinion
I will have to pay more for things like groceries and gas if tariffs are imposed on the U.S. by Canada	7.6	8%	18%	69%	4%
Free trade between Canada and the U.S. has lowered the cost of goods for Canadian consumers	6.6	13%	24%	55%	8%
I trust the federal government to provide me with accurate information about Canada-U.S. relations	5.7	27%	22%	49%	2%
I trust mainstream media to provide me with accurate information about Canada-U.S. relations	5.3	31%	23%	44%	1%
I am worse off today compared to 4 years ago	5.1	36%	25%	36%	3%
Free trade between Canada and the U.S. has cost Canada jobs	4.0	43%	25%	20%	11%
I trust social media to provide me with accurate information about Canada-U.S. relations	2.2	71%	19%	8%	1%
The U.S. subsidizes Canada	1.6	78%	10%	7%	5%
Canada “owes” the U.S.	1.2	84%	8%	6%	3%
Canada should become part of the U.S.	0.8	88%	5%	6%	2%

Base: All Canadian respondents, n=1532.

Net agreement (Agree (7-10)) is higher among the following subgroups:

**Free trade between Canada and the U.S. has lowered the cost of goods for Canadian consumers**

- Men (62%) compared to women (49%).
- Those with a bachelor's degree or more (59%) compared to those with high school or less (44%).
- Those with an income of \$100,000 or more (60%) compared to those with an income of less than \$40,000 (39%) and \$40,000 to \$60,000 (43%).

**I am worse off today compared to 4 years ago**

- Those from Alberta (51%), the Atlantic region (42%) and Manitoba/Saskatchewan (44%) compared to residents of Quebec (26%).


**I will have to pay more for things like groceries and gas if tariffs are imposed on the U.S. by Canada**

- Canadians with an income of \$60,000 - \$100,000 (71%) and \$100,000 or more (70%) compared to those with an income of under \$40,000 (51%).

**I trust mainstream media to provide me with accurate information about Canada-U.S. relations**

- Those from Quebec (57%) compared to those from Manitoba/Saskatchewan (27%) and Alberta (38%).
- Canadians aged 55 plus (52%) compared to those aged 18 to 34 (33%).
- Those with an income of \$100,000 or more (46%) compared to those with an income less than \$40,000 (35%).
- Those with a bachelor's degree or more (49%) compared to those with high school or less (34%).

**I trust the federal government to provide me with accurate information about Canada-U.S. relations**

- Canadians aged 55 plus (56%) compared to those aged 18 to 34 (42%).
- Those with an income of \$100,000 or more (50%) and \$60,000 to \$100,000 (52%) compared to those with an income of less than \$40,000 (40%).
- Those with a bachelor's degree or more (56%) compared to those with high school or less (33%).

**Table 11.3 – Views on Trade and Tariffs Between the U.S. and Canada – U.S.**

Statement	Mean	Disagree (0-3)	Neither agree nor disagree (4-6)	Agree (7-10)	I don't know/I have no opinion
I will have to pay more for things like groceries and gas if tariffs are imposed on Canada by the U.S.	7.2	12%	19%	58%	11%
Free trade between the U.S. and Canada has lowered the cost of goods for American consumers	6.4	13%	23%	42%	21%
I am worse off today compared to 4 years ago	5.2	33%	25%	38%	3%
Free trade between the U.S. and Canada has cost the U.S. jobs	3.6	41%	21%	16%	22%
The U.S. subsidizes Canada	3.6	35%	21%	13%	30%
I trust mainstream media to provide me with accurate information about U.S.-Canada relations	3.2	58%	24%	16%	2%
I trust the federal government to provide me with accurate information about U.S.-Canada relations	3.0	57%	25%	14%	5%
Canada "owes" the U.S.	2.5	59%	14%	12%	15%





I trust social media to provide me with accurate information about U.S.-Canada relations	2.1	72%	21%	5%	3%
Canada should become part of the U.S.	1.8	71%	12%	10%	8%

Base: All American respondents, n=1861.

Net agreement (Agree (7-10)) is higher among the following subgroups:

**Free trade between the U.S. and Canada has lowered the cost of goods for American consumers**

- Men (51%) compared to women (34%).
- Those born outside the U.S. (61%) compared to those born in the U.S. (42%).
- Those with a bachelor's degree or more (54%) compared to those with college/some university (38%) or high school or less (32%).
- Those with an income of \$100,000 or more (51%) compared to those with an income of less than \$30,000 (33%) and \$30,000 to \$60,000 (38%).

**I am worse off today compared to 4 years ago**

- Those born outside the U.S. (52%) compared to those born in the U.S. (37%).

**I trust the federal government to provide me with accurate information about U.S.-Canada relations**

- Those born outside the U.S. (29%) compared to those born in the U.S. (12%).



### Derived importance of agreement with statements versus support for implementing tariffs on goods

The Pearson Correlation score indicates the relationship between support for Canada or the U.S. implementing tariffs on goods to agreement with various statements about trade between the two countries. A value of +1 is a total positive linear correlation, 0 is no linear correlation, and -1 is a total negative linear correlation.

**Table 12.1 – Drivers of Support for Imposing Retaliatory Tariffs on American Goods – Canada**

Statement	Mean	Pearson Score
I will have to pay more for things like groceries and gas if tariffs are imposed on the U.S. by Canada	7.6	-0.168
Free trade between Canada and the U.S. has lowered the cost of goods for Canadian consumers	6.6	-0.025
I trust the federal government to provide me with accurate information about Canada-U.S. relations	5.7	+0.548
I trust mainstream media to provide me with accurate information about Canada-U.S. relations	5.3	+0.426
I am worse off today compared to 4 years ago	5.1	-0.302
Free trade between Canada and the U.S. has cost Canada jobs	4.0	+0.092
I trust social media to provide me with accurate information about Canada-U.S. relations	2.2	-0.139
The U.S. subsidizes Canada	1.6	-0.458
Canada “owes” the U.S.	1.2	-0.455
Canada should become part of the U.S.	0.8	-0.526

The variables have scores between -0.526 and +0.548. These scores indicate that there are negative and positive linear correlations with the statements and support for Canada imposing retaliatory tariffs on American goods. The strongest positive correlation is found with trusting the federal government to provide accurate information about Canada-U.S. relations (+0.548) and the strongest negative correlation is found with the statement “Canada should become part of the U.S.” (-0.526).

**Table 12.2 – Drivers of Support for Imposing Tariffs on Canadian Goods – U.S.**

Statement	Mean	Pearson Score
I will have to pay more for things like groceries and gas if tariffs are imposed on Canada by the U.S.	7.2	-0.634
Free trade between the U.S. and Canada has lowered the cost of goods for American consumers	6.4	-0.465
I am worse off today compared to 4 years ago	5.2	-0.288
Free trade between the U.S. and Canada has cost the U.S. jobs	3.6	+0.519
The U.S. subsidizes Canada	3.6	+0.715
I trust mainstream media to provide me with accurate information about U.S.-Canada relations	3.2	-0.310
I trust the federal government to provide me with accurate information about U.S.-Canada relations	3.0	+0.511
Canada “owes” the U.S.	2.5	+0.664
I trust social media to provide me with accurate information about U.S.-Canada relations	2.1	+0.022
Canada should become part of the U.S.	1.8	+0.413

The variables have scores between -0.634 and +0.715. These scores indicate that there are negative and positive linear correlations with the statements and support for the U.S. imposing tariffs on Canadian goods. The strongest positive correlation is found with the statement “U.S. subsidizes Canada” (+0.715) and the strongest negative correlation is found with the statement “I will have to pay more for things like groceries and gas if tariffs are imposed on Canada by the U.S.” (-0.634).



### Potential impacts on support for imposing tariffs

More than eight in ten Canadians would strongly or somewhat support continuing to impose retaliatory tariffs on imports from the U.S. if they support jobs in their local community (83%), while around one in two each would support continuing to impose these tariffs even if they increase taxes on Canadian businesses (54%) or consumers (51%), contribute to higher housing costs for Canadian homebuyers (49%) or result in job losses in their local community (48%).

Americans' appetite for continuing to impose tariffs on imports from Canada is much lower, with close to one in ten each who support continuing to impose tariffs to some extent even if they increase taxes on American businesses (16%), lead to higher housing costs in the U.S. (12%) or result in job losses (11%) or higher taxes on U.S. consumers (11%). Close to three in five would support continuing the tariffs if they supported jobs in their local community (57%).

Compared to 2023, Americans' support for imposing tariffs on Canada has gone down in all tested situations, including if they contribute to higher housing costs for American homebuyers (14%, down from 21%), if they result in job losses in their local community (12%, down from 21%) and if they support jobs in their community (66%, down from 79%).

*[CANADA] Q – Canada is imposing retaliatory tariffs on imports from the United States in response to the U.S. imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these retaliatory tariffs if...[RANDOMIZE]*

*[U.S.] Q – The United States is imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these tariffs if...[RANDOMIZE]*

**Table 13.1 – Support for Imposing Tariffs/Retaliatory Tariffs – NET SUPPORT**

<b>Strongly/Somewhat support with imposing retaliatory tariffs/tariffs if...</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1866)</b>
...they support jobs in your local community?	83%	57%
...if they increase taxes for Canadian/American businesses?	54%	16%
...if they increase taxes for Canadian/American consumers?	51%	11%
... they contribute to higher housing costs for Canadian/American homebuyers?	49%	12%
...they result in job losses in your local community?	48%	11%

*Base: All Canadian respondents, n=1532 and American respondents, n=1866.*



[CANADA] Q – Canada is imposing retaliatory tariffs on imports from the United States in response to the U.S. imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these retaliatory tariffs if...[RANDOMIZE]

**Table 13.2 – Support for Imposing Retaliatory Tariffs on the U.S. – Canada Only**

<b>Statements (n=1532)</b>	<b>... they contribute to higher housing costs for Canadian homebuyers?</b>	<b>...if they increase taxes for Canadian businesses?</b>	<b>...if they increase taxes for Canadian consumers?</b>	<b>...they result in job losses in your local community?</b>	<b>...they support jobs in your local community?</b>
Strongly support	20%	23%	21%	20%	54%
Somewhat support	28%	32%	30%	28%	29%
Somewhat oppose	22%	20%	18%	24%	7%
Strongly oppose	24%	21%	27%	24%	6%
Don't know/no opinion	5%	5%	4%	4%	5%
<b>NET Support</b>	<b>49%</b>	<b>54%</b>	<b>51%</b>	<b>48%</b>	<b>83%</b>

Base: All Canadian respondents, n=1532.

Net support (strongly support/somewhat support) is higher among the following subgroups:

**Support for retaliatory tariffs on the U.S. if they contribute to higher housing costs for Canadian homebuyers**

- Canadians aged 55 plus (54%) compared to those aged 18 to 34 (42%).
- Those with an income of \$60,000-\$100,000 (54%) and \$100,000 or more (50%) compared to those with an income under \$40,000 (36%).
- Those with a bachelor's degree or more (54%) compared to those with college/some university (44%) or high school or less (30%).

**Support for retaliatory tariffs on the U.S. if they increase taxes for Canadian businesses**

- Those from British Columbia (62%) compared to those from Alberta (48%).
- Canadians aged 55 plus (59%) compared to those aged 18 to 34 (49%).
- Those with a bachelor's degree or more (58%) compared to those with high school or less (38%).

**Support for retaliatory tariffs on the U.S. if they increase taxes for Canadian consumers**

- Those from British Columbia (58%) and the Atlantic region (57%) compared to those from Quebec (43%).
- Canadians aged 55 plus (56%) compared to Canadians aged 18 to 34 (46%).
- Those with a bachelor's degree or more (57%) compared to those with high school or less (33%) or college/some university (46%).

**Support for retaliatory tariffs on the U.S. if they result in job losses in your local community**

- Those from British Columbia (52%), the Atlantic region (51%) and Ontario (51%) compared to those from Alberta (41%).
- Canadians aged 55 plus (54%) compared to those aged 18 to 34 (38%).



- Those with a bachelor's degree or more (52%) compared to those with high school or less (33%) or college/some university (44%).

#### **Support for retaliatory tariffs on the U.S. if they support jobs in your local community**

- Those with a bachelor's degree or more (86%) compared to those with high school or less (66%).

[U.S.] Q – The United States is imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these tariffs if...[RANDOMIZE]

**Table 13.3 – Support for Imposing Tariffs on Canada – U.S. Only**

<b>Statements (n=1866)</b>	<b>... they contribute to higher housing costs for American homebuyers?</b>	<b>...if they increase taxes for American businesses?</b>	<b>...if they increase taxes for American consumers?</b>	<b>...they result in job losses in your local community?</b>	<b>...they support jobs in your local community?</b>
Strongly support	4%	4%	4%	3%	19%
Somewhat support	9%	12%	7%	8%	38%
Somewhat oppose	18%	25%	19%	19%	14%
Strongly oppose	60%	47%	62%	59%	16%
Don't know/no opinion	10%	12%	8%	11%	13%
<b>NET Support</b>	<b>12%</b>	<b>16%</b>	<b>11%</b>	<b>11%</b>	<b>57%</b>

Base: All American respondents, n=1863.

Net support (strongly support/somewhat support) is higher among the following subgroups:

#### **Support for imposing tariffs on Canada if they contribute to higher housing costs for American homebuyers**

- Men (16%) compared to women (9%).
- Those born outside the U.S. (21%) compared to those born in the U.S. (12%).

#### **Support for imposing tariffs on Canada if they support jobs in your local community**

- Those with a high school diploma (65%) compared to those with a bachelor's degree or more (50%).

**Table 13.4 – Support for Imposing Tariffs on Canada – U.S. TRACKING [HAVE AN OPINION ONLY]**

<b>Strongly/Somewhat support with imposing tariffs if...</b>	<b>2023 (n=3,183)</b>	<b>2025 (n=1693)</b>
... they contribute to higher housing costs for American homebuyers?*	21%	14%
...they result in job losses in your local community?	21%	12%
...they support jobs in your local community?	79%	66%

*Base: All American respondents, n=1693 [HAVE AN OPINION ONLY].*

*\*2023 question wording: The United States currently imposes tariffs on imports of certain kinds of Canadian lumber. Would you support or oppose continuing these tariffs if...they contribute to higher housing costs for American homebuyers?*

## **D. Buy American [U.S. ONLY]**

Americans are slightly more likely to support (31%) rather than oppose (19%) Buy American policies for government contracts knowing they could lead to potential delays and increased costs to the government, while one in three are neutral. However, in terms of Buy American policies for state governments, Americans are twice as likely to prefer that state government contracts be open to American companies from outside that state to ensure the state receives the best value for money (54%) rather than only be open to American companies from that state to protect local businesses (25%).

*At the state level, many U.S. states provide preferential treatment to U.S. companies for government contracts. These are often termed as Buy American policies.*

*Q – On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose Buy American policies for government contracts knowing they could lead to potential delays and increased costs to the government?*

**Table 14 – Support for Buy American Policies**

<b>Support</b>	<b>U.S. (n=1866)</b>
Mean	5.5
Oppose (0-3)	19%
Neutral (4-6)	32%
Support (7-10)	31%
I don't know/I have no opinion	18%

*Base: All American respondents, n=1866.*

Support for Buy American policies for government contracts knowing they could lead to potential delays and increased costs to the government are higher among the following subgroups:



- Men (38% support (7-10); mean score of 5.8 out of 10) compared to women (24% support (7-10); mean score of 5.1 out of 10).
- Those aged 55 plus (36% support (7-10); mean score of 5.7 out of 10) compared to those aged 18 to 34 (19% support (7-10); mean score of 4.8 out of 10).
- Those with a household income of \$100,000 or more (38% support (7-10); mean score of 5.9 out of 10) compared to those with a household income of less than \$30,000 (17% support (7-10); mean score of 4.6 out of 10).

*Q – Thinking of Buy American policies for state governments, which of these two statements is closer to your view [ROTATE]*

**Table 15 – Views on Buy American Policies for State Governments**

Statement	U.S. (n=1861)
State government contracts should be open to American companies from outside that state to ensure the state receives the best value for money	54%
State government contracts should only be open to American companies from that state to protect local businesses	25%
Unsure	21%

*Base: All American respondents, n=1861.*

Preference for state government contracts being open to American companies from outside that state to ensure the state receives the best value for money is higher among the following subgroups:

- Americans in the West (66%) compared to respondents in the Northeast (56%), the Midwest (53%) and the South (47%).
- Men (61%) compared to women (48%).
- Americans aged 55 plus (61%) compared to those aged 35 to 54 (52%) and those aged 18 to 34 (45%).
- Those registered to vote at their current address (56%) compared to those not currently registered to vote (35%).
- Those with a bachelor's degree or more (66%) compared to those with some college/an associate's degree (55%) and those with a high school or equivalent education level (40%).
- Those with a household income of \$100,000 or more (68%) compared to those with a household income of \$60,000 to under \$100,000 (55%), \$30,000 to under \$60,000 (49%) and less than \$30,000 (37%).





## E. CUSMA/USMCA

### Views on CUSMA/USMCA

Canadians are more likely than Americans to strongly agree or agree that free trade between Canada, the U.S. and Mexico provides benefits to businesses from their country (Canada: 92%; U.S.: 77%) or citizens from their country (Canada: 90%; U.S.: 79%), while Americans are more likely to agree to some extent that Canada and the U.S. should further increase trade and integrate their economies through trade agreements (Canada: 56%; U.S.: 78%).

About two in three Canadians and Americans each think it is important for the Canadian and U.S. governments to renew the free trade agreement between themselves and Mexico in 2026 (Canada: 69%; U.S.: 67%).

*[CANADA] Q – As you may know, the Canada-United States–Mexico Agreement (CUSMA) between Canada, the United States of America, and Mexico is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be renewed in 2026. Do you agree or disagree with the following statements? [RANDOMIZE]*

*[U.S.] Q – As you may know, the United States–Mexico–Canada Agreement (USMCA) between the United States of America, Mexico, and Canada is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be reviewed in 2026. Do you agree or disagree with the following statements? [RANDOMIZE]*

**Table 16.1 – Agreement with Statements About CUSMA/USMCA – NET AGREE**

<b>Strongly/Somewhat agree</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1868)</b>
Free trade between Canada, the U.S., and Mexico provides benefits to Canadian/ U.S. businesses	92%	77%
Free trade between Canada, the U.S., and Mexico provides benefits to Canadian/ U.S. citizens.	90%	79%
[CANADA] Canada and the U.S. should further integrate their economies through trade agreements/[U.S.] Canada and the U.S. should further increase trade with each other and link their economies through trade agreements	56%	78%

*Base: All Canadian respondents, n=1532 and American respondents, n=1868.*



*[CANADA] Q – As you may know, the Canada-United States–Mexico Agreement (CUSMA) between Canada, the United States of America, and Mexico is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be renewed in 2026. Do you agree or disagree with the following statements? [RANDOMIZE]*

**Table 16.2 – Agreement with Statements About CUSMA – Canada Only**

<b>Statements (n=1532)</b>	<b>Free trade between Canada, the U.S., and Mexico provides benefits to Canadian businesses</b>	<b>Free trade between Canada, the U.S., and Mexico provides benefits to Canadian citizens.</b>	<b>Canada and the U.S. should further integrate their economies through trade agreements</b>
Strongly agree	52%	51%	25%
Somewhat agree	40%	40%	30%
Somewhat disagree	3%	4%	20%
Strongly disagree	2%	3%	19%
Don't know/no opinion	3%	4%	6%
<b>NET Agree</b>	<b>92%</b>	<b>90%</b>	<b>56%</b>

*Base: All Canadian respondents, n=1532.*

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

**Free trade between Canada, the U.S., and Mexico provides benefits to Canadian businesses**

- Those with a bachelor's degree (94%) compared to those with a high school diploma or less (84%).

**Canada and the U.S. should further integrate their economies through trade agreements**

- Residents of Quebec (65%) compared to residents of British Columbia (42%).
- Men (64%) compared to women (48%).



[U.S.] Q – As you may know, the United States–Mexico–Canada Agreement (USMCA) between the United States of America, Mexico, and Canada is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be reviewed in 2026. Do you agree or disagree with the following statements? [RANDOMIZE]

**Table 16.3 – Agreement with Statements About USMCA – U.S. Only**

Statements (n=1866)	Free trade between the U.S., Canada and Mexico provides benefits to U.S. businesses	Free trade between the U.S., Canada and Mexico provides benefits to U.S. citizens.	Canada and the U.S. should further increase trade with each other and link their economies through trade agreements
Strongly agree	41%	41%	38%
Somewhat agree	36%	38%	40%
Somewhat disagree	8%	7%	5%
Strongly disagree	2%	2%	2%
Don't know/no opinion	13%	12%	15%
<b>NET Agree</b>	<b>77%</b>	<b>79%</b>	<b>78%</b>

Base: All American respondents, n=1866.

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

**Free trade between the U.S., Canada and Mexico provides benefits to U.S. businesses**

- Those born outside the U.S. (88%) compared to those born in the U.S. (77%).
- Those with a bachelor's degree (87%) compared to those with a high school diploma (66%) or some college/associate's degree (76%).
- Those with an income of \$100,000 or more (88%) compared to those with an income of under \$30,000 (64%), \$30,000 to \$60,000 (75%), and \$60,000 to \$100,000 (76%).

**Free trade between the U.S., Canada and Mexico provides benefits to U.S. citizens.**

- Those born outside the U.S. (92%) compared to those born in the U.S. (79%).
- Those with a bachelor's degree (89%) compared to those with a high school diploma (70%) or some college/associate's degree (76%).
- Those with an income of \$100,000 or more (87%) compared to those with an income under \$30,000 (66%), \$30,000 to \$60,000 (78%), and \$60,000 to \$100,000 (79%).



### Canada and the U.S. should further increase trade with each other and link their economies through trade agreements

- Men (83%) compared to women (72%).
- Those with a bachelor's degree (87%) compared to those with a high school diploma (65%) or some college/associate's degree (79%).
- Those with an income of \$100,000 or more (87%) compared to those with an income under \$30,000 (59%), \$30,000 to \$60,000 (78%), and \$60,000 to \$100,000 (79%).

*[CANADA] Q – On a scale from 0 to 10, where 0 is not important at all and 10 is very important, how important or unimportant do you think it is for the Canadian Government to renew a free trade agreement with the United States and Mexico in 2026?*

*[U.S.] Q – On a scale from 0 to 10, where 0 is not important at all and 10 is very important, how important or unimportant do you think it is for the U.S. Government to continue its free trade agreement with Canada and Mexico in 2026?*

**Table 17 – Importance of Renewing/Continuing Free Trade Agreement in 2026**

Importance	Canada (n=1532)	U.S. (n=1865)
Mean	7.5	7.9
Not important (0-3)	10%	4%
Neutral (4-6)	18%	20%
Important (7-10)	69%	67%
I don't know/I have no opinion	4%	9%

*Base: All Canadian respondents, n=1532 and American respondents, n=1865.*

Net importance (score of 7-10 out of 10) is higher among the following subgroups:

#### Canada

- Men (73%) compared to women (65%).
- Those with a bachelor's degree or more (71%) compared to those with high school or less (59%).
- Those with a household income over \$100,000 (70%) compared to those with a household income under \$40,000 (60%).

#### U.S.

- Those from the West (74%) and the Northeast (72%) compared to those from the South (61%).
- Those with a household income of \$100,000 or more (76%) compared to those with a household income of less than \$30,000 (54%).
- Those with a bachelor's degree or more (77%) compared to those with a high school education (58%).



## Views on Canada and U.S. being allies and partners

Most Canadians and Americans strongly or somewhat agree that the two countries are essential partners for each other, although Americans are more likely to agree (85%) than Canadians (74%). However, Canadians are significantly less likely to agree that the U.S. is Canada's best friend and ally (40%) than Americans are to agree to the reverse (73%).

Compared to 2023, Americans with an opinion are now noticeably more likely to agree that Canada is the U.S.'s best friend and ally (83%, up from 72%). Views on Canada being an essential partner for the U.S. are marginally up among Americans with an opinion (91% strongly agree/somewhat agree, compared to 86% in 2023).

*Q – To what extent do you agree or disagree with the following statements. [ROTATE]*

**Table 18.1 – Agreement with Statements About Canada and the U.S. – NET AGREE**

<b>Strongly/Somewhat agree</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1859)</b>
The U.S. is an essential partner for Canada/Canada is an essential partner for the U.S.	74%	85%
The U.S. is Canada's best friend and ally/Canada is the U.S.'s best friend and ally	40%	73%

*Base: All Canadian respondents, n=1532 and American respondents, n=1859.*

*Q – To what extent do you agree or disagree with the following statements. [ROTATE]*

**Table 18.2 – Agreement with Statements About Canada and the U.S. – Canada Only**

<b>Statements (n=1532)</b>	<b>The U.S. is Canada's best friend and ally</b>	<b>The U.S. is an essential partner for Canada</b>
Strongly agree	17%	33%
Somewhat agree	23%	41%
Somewhat disagree	26%	14%
Strongly disagree	31%	10%
Don't know/no opinion	3%	2%
<b>NET Agree</b>	<b>40%</b>	<b>74%</b>

*Base: All Canadian respondents, n=1532.*

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

### The U.S. is Canada's best friend and ally

- Those from Alberta (51%) compared to those from Quebec (34%) and British Columbia (31%).
- Men (47%) compared to women (33%).
- Canadians aged 18 to 34 (47%) compared to those aged 55 plus (34%).
- Those with a high school diploma or less (48%) compared to those with a bachelor's degree (37%).



### The U.S. is an essential partner for Canada

- Men (79%) compared to women (70%).
- Those with an income of \$100,000 or more (80%) compared to those with an income under \$40,000 (61%), \$40,000 to \$60,000 (67%), and \$60,000 to \$100,000 (68%).

Q – To what extent do you agree or disagree with the following statements. [ROTATE]

**Table 18.3 – Agreement with Statements About Canada and the U.S. – U.S. Only**

Statements (n=1859)	Canada is the U.S.'s best friend and ally	Canada is an essential partner for the U.S.
Strongly agree	36%	50%
Somewhat agree	36%	35%
Somewhat disagree	12%	8%
Strongly disagree	3%	1%
Don't know/no opinion	12%	6%
<b>NET Agree</b>	<b>73%</b>	<b>85%</b>

Base: All American respondents, n=1859.

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

#### Canada is the U.S.'s best friend and ally

- Men (78%) compared to women (68%).
- Americans aged 55 plus (80%) compared to those aged 18 to 34 and 35 to 54 (67% each).
- Those with a bachelor's degree (79%) compared to those with a high school diploma (67%) or some college/associate's degree (71%).
- Those with an income of \$100,000 or more (82%) compared to those with an income under \$40,000 (64%) and \$40,000 to \$60,000 (69%).

#### Canada is an essential partner for the U.S.

- Those with a bachelor's degree (91%) compared to those with a high school diploma (78%).
- Those with an income of \$100,000 or more (93%) compared to those with an income under \$30,000 (74%) and \$30,000 to \$60,000 (83%).

Q – To what extent do you agree or disagree with the following statements. [ROTATE]

**Table 18.4 – Agreement with Statements About Canada and the U.S. – U.S. TRACKING [HAVE AN OPINION ONLY]**

Strongly/Somewhat agree	2023 (n=3,183)	2025 (n=1761)
Canada is the U.S.'s best friend and ally	72%	83%
Canada is an essential partner for the U.S.	86%	91%

Base: All American respondents, n=1761 [HAVE AN OPINION ONLY].



## F. Border Security

### Border issues of concern

The top issue of concern for Canadians in relation to the Canada-U.S. border is firearms (Canada: 41%, U.S.: 3%), followed by human trafficking and smuggling (Canada: 20%, U.S.: 21%) and organized crime (13%). Americans are more concerned about illegal drugs (U.S.: 22%, Canada: 10%) and human trafficking (US: 21%, Canada: 20%), while more than one in three say they are not concerned about any of them (36% Americans; 11% of Canadians).

*Q – Which of the following issues are you most concerned about in relation to the Canada-U.S./U.S.-Canada border? [ROTATE][SELECT ONE]*

**Table 19 – Issues of Concern Related to Canada-U.S. Border**

Issue	Canada (n=1522)	U.S. (n=1844)
Firearms	41%	3%
Human trafficking and smuggling	20%	21%
Organized crime	13%	4%
Illegal drugs	10%	22%
None of the above/none are a concern	11%	36%
Other	5%	2%
I don't know/have no opinion	2%	12%

*Base: All Canadian respondents, n=1522 and American respondents, n=1844.*

The following are significant demographic differences observed:

#### Canada

- Residents of Quebec are more likely to be more concerned about human trafficking and smuggling (30%) than those from Ontario (16%), Alberta (16%) and British Columbia (16%). Residents of Ontario are more likely to be concerned about firearms (49%) compared to residents of Manitoba/Saskatchewan (25%) or Alberta (35%).
- Women (22%) are more likely than men (17%) to be concerned about human trafficking and smuggling.
- Canadians aged 55 plus (48%) are more likely to be concerned about firearms than those 18 to 34 (32%) and 35 to 54 (39%).
- Those with a bachelor's degree are more likely to be concerned about firearms (44%) than those with college/some university (37%).
- Those born in Canada are more likely to be concerned about firearms (42%) than those born outside of Canada (34%).
- Those born outside of Canada are more likely to be concerned about organized crime (19%) than those born in Canada (12%).



## U.S.

- Men (25%) are more likely than women (19%) to be concerned about illegal drugs.
- Americans aged 55 plus (27%) are more likely to be concerned about illegal drugs than those aged 18 to 34 (15%) and 35 to 54 (19%).
- Those with a bachelor's degree or more (47%) are more likely to not be concerned about any of the issues presented than those with a high school degree (27%) or some college/associate's degree (32%).
- Those with a high school education are more likely to be concerned about illegal drugs (23%) than those with some college or an associate degree (17%) or a bachelor's degree or more (17%).
- Those with an income of \$30,000 to \$60,000 (30%) are more likely to report being concerned about illegal drugs than those with an income of less than \$30,000 (17%), \$60,000 to \$100,000 (21%) and \$100,000 or more (20%).
- Americans aged 18 to 34 (38%) and 35 to 54 (44%) are more likely to say they are not concerned about any of the issues presented compared to those aged 55 plus (30%).





## Management of Canada-U.S. border

A majority of Canadians and Americans strongly agree or agree that the way the Canada-U.S. border is currently managed enables smooth travel (Canada: 81%; U.S.: 72%) and trade between the countries (Canada: 81%; U.S.: 72%), as well as that the border contributes to the economy of their country (Canada: 73%; U.S.: 66%).

There was less agreement that the border contributes to reducing crime in both countries (Canada: 48%; U.S.: 42%) or that it encourages illegal immigration into their country (Canada: 44%; U.S.: 30%). Canadians are more likely to agree than Americans that the border poses a threat to the national security of their country (Canada: 38%; U.S.: 27%), while Americans are more likely to agree that the border contributes to fentanyl trafficking in the U.S. (Canada: 19%; U.S.: 38%), although this is a minority opinion.

*[CANADA] Q – Thinking about the border between Canada and the United States, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]*

*[U.S.] Q – Thinking about the northern border between the United States and Canada, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]*

**Table 20.1 – Agreement with Statements About Canada-U.S. Border – NET AGREE**

<b>Strongly/Somewhat agree</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1857)</b>
The border enables smooth travel between the countries	81%	72%
The border enables smooth trade between the countries	81%	72%
The border contributes to the Canadian economy/The border contributes to the U.S. economy	73%	66%
The border contributes to reducing crime in both countries	48%	42%
The border encourages illegal immigration into Canada/The border encourages illegal immigration into the U.S.	44%	30%
The border poses a threat to national security in Canada	38%	21%
The border contributes to fentanyl trafficking in the U.S.	19%	38%
The border poses a threat to national security in the U.S.	-	27%

*Base: All Canadian respondents, n=1532 and American respondents, n=1857.*



*Q – Thinking about the border between Canada and the United States, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]*

**Table 20.2 – Agreement with Statements About Canada-U.S. Border – Canada Only**

Statements (n=1532)	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	NET Agree	Don't know/no opinion
The border poses a threat to national security in Canada	10%	28%	32%	24%	<b>38%</b>	7%
The border contributes to the Canadian economy	28%	44%	12%	2%	<b>73%</b>	14%
The border encourages illegal immigration into Canada	14%	30%	28%	22%	<b>44%</b>	6%
The border enables smooth trade between the countries	32%	49%	10%	3%	<b>81%</b>	7%
The border enables smooth travel between the countries	31%	51%	11%	3%	<b>81%</b>	4%
The border contributes to reducing crime in both countries	12%	35%	26%	13%	<b>48%</b>	14%
The border contributes to fentanyl trafficking in the U.S.	7%	11%	21%	53%	<b>19%</b>	8%

*Base: All Canadian respondents, n=1532.*

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

**The border poses a threat to national security in Canada**

- Canadians from British Columbia (43%) compared to those from Quebec (32%).
- Those who have an income of \$40,000 to \$60,000 (45%) compared to those who have an income of under \$40,000 (32%).

**The border contributes to the Canadian economy**

- Canadians from Ontario (77%) compared to those from Manitoba/Saskatchewan (64%).
- Those with a bachelor's degree or more (74%) compared to those with a high school diploma (65%).

**The border encourages illegal immigration into Canada**

- Residents of Alberta (52%) compared to Ontario (42%).
- Men (50%) compared to women (39%).
- Canadians aged 35 to 54 (49%) compared to those aged 18 to 34 (41%) and 55 plus (42%).

**The border enables smooth trade between the countries**

- Those with an income of \$100,000 or more (82%) compared to those with an income of \$30,000 or under (73%).

**The border enables smooth travel between the countries**



- Those with an income of \$100,000 or more (84%) compared to those with an income of \$30,000 or under (72%).

#### The border contributes to fentanyl trafficking in the U.S.

- Those with a high school diploma or less (27%) compared to those with a bachelor's degree (17%).
- Those born outside of Canada (27%) compared to those born in Canada (17%).

*Q – Thinking about the northern border between the United States and Canada, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]*

**Table 20.3 – Agreement with Statements About Canada and the U.S. – U.S. Only**

Statements (n=1857)	Strongly Agree	Somewhat Agree	Somewhat Disagree	Strongly Disagree	NET Agree	Don't know/no opinion
The border poses a threat to national security in the U.S.	8%	20%	25%	32%	<b>27%</b>	16%
The border poses a threat to national security in Canada	3%	18%	27%	30%	<b>21%</b>	23%
The border contributes to the U.S. economy	26%	40%	11%	2%	<b>66%</b>	21%
The border encourages illegal immigration into the U.S.	8%	23%	24%	30%	<b>30%</b>	16%
The border enables smooth trade between the countries	29%	44%	8%	2%	<b>72%</b>	18%
The border enables smooth travel between the countries	30%	43%	10%	3%	<b>72%</b>	15%
The border contributes to reducing crime in both countries	12%	30%	19%	8%	<b>42%</b>	32%
The border contributes to fentanyl trafficking in the U.S.	12%	26%	17%	21%	<b>38%</b>	25%

*Base: All American respondents, n=1857.*

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

#### The border poses a threat to national security in the U.S.

- Those from the South (32%) compared to the Northeast (19%).
- Americans aged 55 plus (33%) compared to those aged 18 to 34 (19%).
- Those with some college or associate's degree (32%) compared to those with a bachelor's degree or more (22%).

#### The border poses a threat to national security in Canada

- Those from the South (27%) compared to the Midwest (17%), the West (17%) and the Northeast (17%).



### **The border contributes to the U.S. economy**

- Men (71%) compared to women (61%).
- Americans aged 55 plus (70%) compared to those aged 18 to 34 (61%) and 35 to 54 (63%).
- Those with a bachelor's degree or more (71%) compared to those with a high school diploma (61%).
- Those with an income of \$100,000 or more (72%) compared to those with an income of less than \$30,000 (57%).

### **The border encourages illegal immigration into the U.S.**

- Those from the South (34%) compared to the Northeast (25%).
- Men (35%) compared to women (25%).
- Americans aged 55 plus (37%) compared to those aged 18 to 34 (22%).
- Those born outside the U.S. (38%) compared to those born in the U.S. (30%).
- Those with a high school diploma (35%) compared to those with a bachelor's degree or more (24%).
- Those with an income of \$100,000 or more (78%) compared to those with an income of \$60,000 to \$100,000 (70%) and less than \$30,000 (64%).

### **The border enables smooth trade between the countries**

- Americans aged 55 plus (75%) compared to those aged 18 to 34 (63%).
- Those born outside the U.S. (84%) compared to those born in the U.S. (72%).
- Those with a bachelor's degree or more (80%) compared to those with a high school diploma (65%).
- Those with an income of \$100,000 or more (78%) compared to those with an income of \$60,000 to \$100,000 (70%) and less than \$30,000 (64%).

### **The border enables smooth travel between the countries**

- Men (77%) compared to women (68%).
- Americans aged 55 plus (77%) compared to those aged 18 to 34 (65%).
- Those born outside the U.S. (82%) compared to those born in the U.S. (73%).
- Those with a bachelor's degree or more (81%) compared to those with a high school diploma (63%).
- Those with an income of \$100,000 or more (82%) compared to those with an income of \$60,000 to \$100,000 (70%), \$30,000 to \$60,000 (72%) and less than \$30,000 (60%).

### **The border contributes to reducing crime in both countries**

- Those born outside the U.S. (52%) compared to those born in the U.S. (41%).

### **The border contributes to fentanyl trafficking in the U.S.**

- Americans aged 55 plus (45%) compared to those aged 18 to 34 (27%).
- Those with a high school education (43%) compared to those with a bachelor's degree or more (31%).
- Those with an income of \$30,000 to \$60,000 (45%) compared to those with an income of less than \$30,000 (35%), \$60,000 to \$100,000 (37%) or \$100,000 or more (35%).



## Safety and security of border

Both Canadians and Americans were more likely to strongly agree or agree that the U.S. is a major source of fentanyl coming into Canada (Canada: 60%; U.S.: 24%) than they were to agree that Canada is a major source for the U.S. (Canada: 12%; U.S.: 18%), and Americans were more likely to agree that Canada is doing a good job of securing the Canada-U.S. border (58%) than Canadians were to agree about the reverse (38%).

Close to four in five Americans agree to some extent that the Canada-U.S. border is safer than the U.S.-Mexico border.

*Q – To what extent do you agree or disagree with the following statements? [RANDOMIZE]*

**Table 21.1 – Agreement with Statements About Security and Safety of Canada-U.S. Border – NET AGREE**

<b>Strongly/Somewhat agree</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1864)</b>
The U.S. is a major source of fentanyl into Canada	60%	24%
The U.S. is doing a good job of securing the Canada-U.S. border/Canada is doing a good job of securing the U.S.-Canada border	38%	58%
Canada is a major source of fentanyl to the U.S.	12%	18%
The U.S.-Canada border is safer than the U.S.-Mexico border	-	79%

*Base: All Canadian respondents, n=1532 and American respondents, n=1864.*

*Q – To what extent do you agree or disagree with the following statements? [RANDOMIZE]*

**Table 21.2 – Agreement with Statements About Security and Safety of Canada-U.S. Border – Canada Only**

<b>Statements (n=1532)</b>	<b>The U.S. is doing a good job of securing the Canada-U.S. border</b>	<b>Canada is a major source of fentanyl to the U.S.</b>	<b>The U.S. is a major source of fentanyl into Canada</b>
Strongly agree	5%	5%	25%
Somewhat agree	33%	7%	36%
Somewhat disagree	31%	13%	13%
Strongly disagree	18%	68%	9%
Don't know/no opinion	13%	7%	18%
<b>NET Agree</b>	<b>38%</b>	<b>12%</b>	<b>60%</b>

*Base: All Canadian respondents, n=1532.*

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:



### The U.S. is doing a good job of securing the U.S.-Canada border

- Those from Manitoba/Saskatchewan (50%) compared to Canadians overall (38%).
- Men (44%) compared to women (34%).
- Those with an income of \$100,000 or more (41%) compared to those with an income under \$40,000 (30%).

### The U.S. is a major source of fentanyl into Canada

- Those from the Atlantic region (64%), Ontario (66%), Manitoba/Saskatchewan (70%) compared to those from Quebec (50%).
- Canadians aged 55 plus (64%) and 35 to 54 (63%) compared to those aged 18 to 34 (50%).
- Those born in Canada (62%) compared to those born outside of Canada (49%).

Q – To what extent do you agree or disagree with the following statements? [RANDOMIZE]

**Table 21.3 – Agreement with Statements About Security and Safety of U.S.-Canada Border – U.S. Only**

Statements (n=1864)	Canada is doing a good job of securing the U.S.-Canada border	The U.S.-Canada border is safer than the U.S.-Mexico border	Canada is a major source of fentanyl to the U.S.	The U.S. is a major source of fentanyl into Canada
Strongly agree	21%	38%	3%	6%
Somewhat agree	37%	40%	14%	18%
Somewhat disagree	12%	6%	17%	13%
Strongly disagree	4%	2%	24%	12%
Don't know/no opinion	26%	14%	41%	50%
<b>NET Agree</b>	<b>58%</b>	<b>79%</b>	<b>18%</b>	<b>24%</b>

Base: All American respondents, n=1864.

Net agreement (strongly agree/somewhat agree) is higher among the following subgroups:

### Canada is doing a good job of securing the U.S.-Canada border

- Those with a bachelor's degree or more (61%) compared to those with a high school education (55%).

### The U.S.-Canada border is safer than the U.S.-Mexico border

- Men (84%) compared to women (74%).
- Americans aged 55 plus (83%) and 35 to 54 (79%) compared to those aged 18 to 34 (71%).
- Those with a bachelor's degree or more (84%) compared to those with a high school education (73%).
- Those with an income of \$100,000 or more (81%) or \$60,000 to \$100,000 (82%) compared to those with an income of less than \$30,000 (73%).

### Canada is a major source of fentanyl to the U.S.

- Americans aged 55 plus (22%) compared to those aged 18 to 34 (11%).

### The U.S. is a major source of fentanyl into Canada



- Those from the West (29%) compared to those from the Northeast (18%).
- Americans aged 18 to 34 (30%) compared to those aged 55 plus (19%).

## Canada's Border Security Plan

Canadians are significantly more likely to report having heard of Canada's new border security plan (87%) than Americans (28%).

About three in five Canadians and Americans each think the measures proposed in Canada's border plan will deter people a great deal or somewhat from crossing into the U.S. irregularly or undetected (Canada: 60%; U.S.: 61%), although of note, close to one in five Americans are unsure what impact the measures will have (19%; 7% of Canadians).

A majority of Canadians and Americans support or somewhat support the overall goals of Canada's border plan, although Canadians are slightly more likely to support them than Americans (Canada: 81%; U.S.: 72%). In terms of their support for Canada increasing the use of various technologies to manage the Canada-U.S. border, both Canadians and Americans are similarly supportive of app- or web-based forms (Canada: 78%; U.S.: 75%), electronic gates (Canada: 71%; U.S.: 74%) and facial recognition/biometrics (Canada: 68%; U.S.: 70%). Canadians are more likely to support Canada increasing the use of drones to manage the border (82%) than Americans are (68%).

*In December 2024, the Canadian government announced a plan to strengthen border security. This plan includes an investment of \$1.3 billion and aims to increase border security, disrupt the fentanyl trade, provide new tools to law enforcement, among others. The measures in the plan include enhanced surveillance technologies, increased border patrols and a joint strike force between Canada and the U.S. and additional intelligence gathering and analysis.*

*Q – Prior to today, had you heard or not heard about Canada's new border security plan?*

**Table 22 – Awareness of Canada's Border Security Plan**

Awareness	Canada (n=1530)	U.S. (n=1864)
Heard	87%	28%
Not heard	13%	72%

*Base: All Canadian respondents, n=1530 and American respondents, n=1864.*

Awareness of Canada's border security plan is higher among the following subgroups:

### Canada

- Canadians from the Atlantic region (93%) and Ontario (89%) compared to residents of Quebec (81%).
- Men (90%) compared to women (83%).
- Those aged 55 plus (93%) compared to those aged 18 to 34 (78%) and those aged 35 to 54 (86%).

Awareness of Canada's new border security plan is also higher among Canadians aged 35 to 54 than among Canadians aged 18 to 34.



- Those with an income of \$100,000 or more (89%) compared to those with an income under \$40,000 (78%) and those with an income of \$40,000 to just under \$60,000 (81%).
- Those with a bachelor's degree or more (89%) compared to those with a high school education or less (80%).
- Those born in Canada (88%) compared to those born outside of Canada (82%).

**U.S.**

- Men (38%) compared to women (19%).
- Americans aged 55 plus (32%) and 35 to 54 (28%) compared to those aged 18 to 34 (18%).
- Those with an income of \$100,000 or more (37%) \$60,000 to \$100,000 (30%) and \$30,000 to \$60,000 (25%) compared to those with an income under \$30,000 (14%)
- Those with a bachelor's degree or more (36%) or some college/associate's degree (26%) compared to those with a high school education or less (19%).

*Q – To what extent do you think the measures proposed in Canada's Border Plan will deter people from crossing into the U.S. irregularly or undetected?*

**Table 23 – Impact of Border Security Plan on Deterring People Crossing into U.S. Irregularly/Undetected**

<b>Impact</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1863)</b>
A great deal	12%	16%
Somewhat	48%	44%
Not very much	27%	18%
Not at all	6%	3%
Unsure	7%	19%
<b>NET Impact</b>	<b>60%</b>	<b>60%</b>

*Base: All Canadian respondents, n=1532 and American respondents, n=1863.*

Net impact (a great deal/somewhat) is higher among the following subgroups:

**Canada**

- Canadians aged 55 plus (68%) compared to those aged 18 to 34 (52%)

**U.S.**

- Those in the Northeast (68%), the Midwest (63%) and the West (63%) compared to respondents in the South (55%)
- Those aged 55 plus (65%) compared to those aged 18 to 34 (56%)
- Those with a bachelor's degree or more (64%) compared to those with high school or equivalent education (56%)
- Those with a household income of \$100,000 or more (65%) compared to those with a household income of less than \$30,000 (54%).





Q – To what extent do you support or oppose the overall goals of Canada's Border Plan?

**Table 24 – Support for Canada's Border Security Plan**

Level of support	Canada (n=1532)	U.S. (n=1843)
Support	37%	36%
Somewhat support	45%	36%
Somewhat oppose	8%	4%
Oppose	3%	2%
Unsure	8%	23%
<b>NET Support</b>	<b>81%</b>	<b>72%</b>

Base: All Canadian respondents, n=1532 and American respondents, n=1843.

Net support (support/somewhat support) is higher among the following subgroups:

#### Canada

- Canadians aged 55 plus (89%) and 35 to 54 (81%) compared to those aged 18 to 34 (69%).

#### U.S.

- Men (77%) compared to women (68%).
- Americans aged 55 plus (77%) and 35 to 54 (72%) compared to those aged 18 to 34 (62%).
- Those with an income of \$100,000 or more (79%), \$60,000 to \$100,000 (76%), and \$30,000 to \$60,000 (75%) compared to those with an income under \$30,000 (54%).
- Those with a bachelor's degree or more (79%) or some college/associate's degree (73%) compared to those with a high school education or less (63%).

Q – To what extent do you support or oppose Canada increasing the use of the following types of technology to manage the Canada-U.S. border? [RANDOMIZE]

**Table 25.1 – Support for Use of Various Technologies to Manage Border – NET SUPPORT**

Support/Somewhat support	Canada (n=1532)	U.S. (n=1860)
App or web-based forms (including customs declarations, submission of traveller information)	78%	75%
Facial recognition technology/biometrics	68%	70%
Electronic gates	71%	74%
Drones	82%	68%

Base: All Canadian respondents, n=1532 and American respondents, n=1860.



*Q – To what extent do you support or oppose Canada increasing the use of the following types of technology to manage the Canada-U.S. border? [RANDOMIZE]*

**Table 25.2 – Support for Use of Various Technologies to Manage Border – Canada Only**

Statements (n=1532)	App or web-based forms	Facial recognition technology/biometrics	Electronic gates	Drones
Support	44%	40%	39%	55%
Somewhat support	34%	28%	32%	27%
Somewhat oppose	10%	14%	9%	7%
Oppose	6%	13%	7%	6%
Unsure	6%	5%	14%	5%
<b>NET Support</b>	<b>78%</b>	<b>68%</b>	<b>71%</b>	<b>82%</b>

*Base: All Canadian respondents, n=1532.*

Net support (support/somewhat support) is higher among the following subgroups:

**Facial recognition technology/biometrics**

- Those aged 55 plus (75%) and 35 to 54 (71%) compared to Canadians aged 18 to 34 (54%).

**App or web-based forms**

- Those with an income of \$100,000 or more (81%), \$60,000 to \$100,000 (79%), and \$40,000 to \$60,000 (77%) compared to those with an income under \$40,000 (63%).

**Electronic gates**

- Canadians from Quebec (75%) compared to those from British Columbia (60%).
- Men (75%) compared to women (67%).
- Those with an income of \$100,000 or more (73%), \$60,000 to \$100,000 (70%), and \$40,000 to \$60,000 (71%) compared to those with an income under \$40,000 (62%).

**Drones**

- Men (87%) compared to women (78%).
- Those aged 55 plus (86%) and 35 to 54 (84%) compared to those aged 18 to 34 (73%).



Q – To what extent do you support or oppose Canada increasing the use of the following types of technology to manage the Canada-U.S. border? [RANDOMIZE]

**Table 25.3 – Support for Use of Various Technologies to Manage Border – U.S. Only**

Statements (n=1860)	App or web-based forms	Facial recognition technology/biometrics	Electronic gates	Drones
Support	42%	39%	41%	36%
Somewhat support	33%	32%	34%	32%
Somewhat oppose	5%	11%	7%	10%
Oppose	4%	9%	3%	7%
Unsure	16%	10%	15%	15%
<b>NET Support</b>	<b>75%</b>	<b>70%</b>	<b>74%</b>	<b>68%</b>

Base: All American respondents, n=1860.

Net support (support/somewhat support) is higher among the following subgroups:

#### App or web-based forms

- Those from the West (84%) compared to those from the South (72%), the Midwest (75%) and the Northeast (72%).
- Americans aged 55 plus (78%) and 35 to 54 (78%) compared to those aged 18 to 34 (66%).
- Those with a bachelor's degree or more (85%) compared to those with some college/associate's degree (72%) or a high school education (66%).
- Those born outside the U.S. (87%) compared to those born in the U.S. (75%).
- Those with an income of \$100,000 or more (87%), \$60,000 to \$100,000 (77%), and \$30,000 to \$60,000 (72%) compared to those with an income under \$30,000 (58%).

#### Facial recognition technology/biometrics

- Americans aged 55 plus (81%) and 35 to 54 (70%) compared to those aged 18 to 34 (51%).
- Those born outside the U.S. (82%) compared to those born in the U.S. (70%).
- Those with an income of \$100,000 or more (79%), \$60,000 to \$100,000 (75%), and \$30,000 to \$60,000 (67%) compared to those with an income under \$30,000 (56%).

#### Electronic gates

- Those from the West (82%) compared to those from the South (72%), the Midwest (74%) and the Northeast (71%).
- Men (78%) compared to women (71%).
- Americans aged 55 plus (78%) and 35 to 54 (75%) compared to those aged 18 to 34 (67%).
- Those with a bachelor's degree or more (80%) or some college/associate's degree (75%) compared to those with or a high school education (68%).
- Those with incomes of \$100,000 or more (80%), \$60,000 to \$100,000 (77%) and \$30,000 to \$60,000 (73%) compared to those with a lower income (Under \$30,000; 63%).

#### Drones

- Men (75%) compared to women (62%).



- Americans aged 55 plus (77%) and 35 to 54 (68%) compared to those aged 18 to 34 (51%).
- Those with a bachelor's degree or more (73%) compared to those with a high school education (61%).
- Those with incomes of \$100,000 or more (78%), \$60,000 to \$100,000 (72%) and \$30,000 to \$60,000 (65%) compared to those with a lower income (Under \$30,000; 52%).

## G. Government Communications on Canada-U.S. Issues [CANADA ONLY]

### Top sources of information

Canadians most often selected TV as the source they typically go to for news (66%), followed by newspaper (51%), radio (45%) and social media (40%). In terms of the specific social media channels they use most frequently, they most often rank Facebook first (29%), followed by YouTube (21%) and Instagram (10%).

*Q – What source(s) do you typically go to for news? (Please select all that apply) [RANDOMIZE]?*

**Table 26 – Top Sources for News**

Source	Canada (n=1478)
TV	66%
Newspaper	51%
Radio	45%
Social media	40%
Word of mouth	11%
Other	11%
None	2%

*Base: All Canadian respondents, n=1478*

*Q – Please rank the top three social media channels you use the most frequently (maximum three) [RANDOMIZE]?*

**Table 27 – Top Social Media Channels**

Social media channel	Rank 1 (n=1451)	Rank 2 (n=1075)	Rank 3 (n=775)
Facebook	29%	23%	14%
YouTube	21%	21%	17%
Instagram	10%	15%	15%
Twitter/X	8%	6%	8%
Reddit	6%	6%	8%
WhatsApp	4%	6%	8%
TikTok	3%	4%	6%



LinkedIn	3%	8%	11%
Bluesky	3%	5%	3%
Telegram	1%	1%	1%
Snapchat	<1%	1%	1%
Another social media application	3%	3%	6%
None, do not use social media	11%	1%	2%

Base: All Canadian respondents, n=1441.

### Canadian government communications on Canada-U.S. issues

Canadians are more than twice as likely to say the Government of Canada is doing a good job (55%) rather than a poor job (21%) at informing the Canadian public about Canada-U.S. trade relations and are similarly more likely to have a great deal of confidence (56%) rather than no confidence (26%) in the government handling Canada-U.S. relations.

*Q – On a scale from 0 to 10, where 0 is a very poor job and 10 is a very good job, how well a job has the Government of Canada been doing at informing the Canadian public about Canada-U.S. trade relations?*

**Table 28 – Performance of Federal Government Informing Public on Canada-U.S. Relations**

Perceived performance	Canada (n=1532)
Mean	6.2
Poor job (0-3)	21%
Neutral (4-6)	21%
Good job (7-10)	55%
I don't know/I have no opinion	3%

Base: All Canadian respondents, n=1532.

The perceived performance of the federal government informing the public on Canada-U.S. relations is lower among the following subgroups:

- Canadians from Manitoba/Saskatchewan (34% say poor job (0-3); mean score of 5.3 out 10) and Alberta (27% score 0-3; mean score of 5.4 out of 10) compared to residents of Quebec (14% score 0-3; mean score of 6.6)
- Men (25% say poor job (0-3); mean score of 5.8 out 10) compared to women (18% score 0-3; mean score of 6.6 out of 10)
- Canadians aged 18 to 34 (24% say poor job (0-3); mean score of 5.6 out of 10) compared to those aged 55 plus (17% say poor job (0-3); mean score of 6.6. out of 10).
- Those with a high school education or less (26% say poor job (0-3); mean score of 5.4 out 10) compared to those with a bachelor's degree or more (20% say poor job (0-3); mean score of 6.4 out 10).



*Q – On a scale from 0 to 10, 0 is no confidence at all and 10 is a great deal of confidence, how much confidence do you have in the federal government to handle trade relations with the U.S.?*

**Table 29 – Confidence in Federal Government to Handle Canada-U.S. Relations**

<b>Level of confidence</b>	<b>Canada (n=1532)</b>
Mean	6.0
No confidence (0-3)	26%
Neutral (4-6)	17%
Great deal of confidence (7-10)	56%
I don't know/I have no opinion	1%

*Base: All Canadian respondents, n=1532.*

The perceived confidence in the federal government to handle Canada-U.S. relations is lower among the following subgroups:

- Canadians from Manitoba/Saskatchewan (34% say no confidence (0-3); mean score of 5.1 out 10) and Alberta (41% score 0-3; mean score of 4.6 out of 10) compared to residents of Quebec (18% score 0-3; mean score of 6.4)
- Men (32% say no confidence (0-3); mean score of 5.5 out 10) compared to women (20% score 0-3; mean score of 6.4 out of 10)
- Those with a high school education or less (30% say no confidence (0-3); mean score of 5.2 out 10) compared to those with a bachelor's degree or more (24% score 0-3); mean score of 6.2 out 10).



## H. Cross-Border Supply Chains [U.S. ONLY]

Americans are more likely to think the Canadian economy is important or somewhat important to the U.S. economy (83%) than they are to think the Mexican economy is important (75%).

*Q – How important or unimportant do you think the Canadian economy is to the U.S. economy?*

*Q – How important or unimportant do you think the Mexican economy is to the U.S. economy?*

**Table 30 – Importance of Canadian and Mexican Economies to U.S. Economy**

Level of importance to U.S. economy	Canadian Economy	Mexican Economy
Important	45%	39%
Somewhat important	39%	36%
Somewhat unimportant	7%	12%
Unimportant	2%	4%
Unsure	8%	9%
<b>NET Importance</b>	<b>83%</b>	<b>75%</b>

*Base: All American respondents, n=1862.*

Belief that the Canadian economy is important or somewhat important is higher among the following subgroups:

- Those who have a household income of \$100,000 or more (89%) and \$60,000 to \$100,000 (87%) compared to those with an income of less than \$30,000 (72%).
- Those with a bachelor's degree or more (91%) or some college or an associate's degree (83%) compared to those with a high school education (75%).
- Americans aged 55 plus (86%) compared to those aged 18 to 34 (78%).

Belief that the Mexican economy is important or somewhat important is higher among the following subgroups:

- Those from the West (82%) compared to those from the Midwest (71%).
- Those born outside the U.S. (85%) compared to those born in the U.S. (75%).
- Those who have a household income of \$100,000 or more (83%) compared to those with an income of less than \$30,000 (62%).
- Those with a bachelor's degree or more (84%) compared to those with some college or an associate's degree (73%) or a high school education (66%).



## I. Collaboration

### Impact of the U.S. government

Canadians are significantly more likely than Americans to think the current U.S. government will have a negative or somewhat negative impact on Canada-U.S. relations (Canada: 90%; U.S.: 60%), with four in five Canadians saying it will have an outright negative impact (80%; U.S.: 45%). Less than 1% of Canadians think the current U.S. government will have no impact (1% of Americans), and just 6% believe the impact will be positive or somewhat positive (24% of Americans).

*[CANADA] Q – What type of impact do you think the current U.S. government will have on Canada-U.S. relations?*

*[U.S.] Q – What type of impact do you think the current U.S. government will have on U.S.-Canada relations?*

**Table 31 – Impact of U.S. Government on Canada-U.S. Relations**

Level of impact	Canada (n=1532)	U.S. (n=1859)
Positive	2%	8%
Somewhat positive	4%	16%
Somewhat negative	10%	15%
Negative	80%	45%
No impact	-	1%
Unsure	4%	15%
<b>NET Positive</b>	<b>6%</b>	<b>24%</b>
<b>NET Negative</b>	<b>90%</b>	<b>60%</b>

*Base: All Canadian respondents, n=1532 and American respondents, n=1859.*

Belief that the current U.S. government will have a net negative impact on Canada-U.S. relations is higher among the following subgroups:

#### Canada:

- Canadians aged 55 plus (95%) compared to those aged 18 to 34 (85%).
- Those with a bachelor's degree or more (91%) and some college/university (90%) compared to those with a high school education or less (82%).

#### U.S.:

- Those from the West (65%) compared to those from the South (55%).
- Those who were born outside of the U.S. (68%) compared to those born in the U.S. (60%).
- Those with a bachelor's degree or more (73%) and some college or an associate's degree (57%) compared to those with a high school education (47%).





- Those with an income of \$100,000 or more (73%) compared to those with a lower income (\$60,000 to \$100,000; 59%, \$30,000 to \$60,000; 52%, under \$30,000; 52%).

### Top sources of news and information

Both Canadians and Americans most often report going to TV for news or information about Canada-U.S. relations (Canada: 65%; U.S.: 54%). Canadians also often report going to newspapers (50%), radio (41%) or social media (37%), while Americans often report having social media (34%) or a newspaper (26%) as a source. Of note, 12% of Americans report they do not go to any of these sources for news or information about Canada-U.S. relations, compared to just 2% of Canadians.

*[CANADA] Q – What source(s) do you go to for news or information about Canada-U.S. relations? (Please select all that apply) [RANDOMIZE]*

*[U.S.] Q – What source(s) do you go to for news or information about U.S.-Canada relations? (Please select all that apply) [RANDOMIZE]*

**Table 32 – Top Sources for News on Canada-U.S. Relations**

Source	Canada (n=1482)*	U.S. (n=1793)*
TV	65%	54%
Newspaper	50%	26%
Radio	41%	20%
Social media	37%	34%
Word of mouth	9%	13%
Other	10%	8%
None	2%	12%

Base: All Canadian respondents, n=1482 and American respondents, n=1793.

\*Based on multiple mentions

The following demographic differences are observed:

#### Canada

- Residents of the Atlantic region (26%) and Quebec (25%) are less likely to go to social media for news or information about U.S.-Canada relations than Canada overall (37%).
- Residents of Quebec (51%) are more likely to get news or information about U.S.-Canada relations through the radio compared to Canada overall (41%).
- Men (40%) are more likely to turn to social media for news or information about U.S.-Canada relations than women (33%). On the other hand, women (66%) are more likely to turn to TV for news or information about U.S.-Canada relations compared to men (62%).
- Canadians aged 18 to 34 (52%) are more likely to turn to social media for news or information about U.S.-Canada relations than those aged 35 to 54 (38%) or 55 plus (25%). Canadians aged 35



to 54 (16%) are also more likely to use word of mouth than those aged 35 to 54 (6%) and 55 plus (8%).

- Canadians aged 55 plus are more likely to turn to TV (81%), newspapers (59%) and the radio (48%) than Canadians overall (65%, 50% and 41%, respectively).
- Those with an income of under \$40,000 (21%) are more likely to turn to word of mouth than Canadians overall (9%).

## U.S.

- Americans from the Northeast (30%) and the West (30%) are more likely to turn to newspapers than residents of the South (22%).
- Women are more likely to turn to social media (37%) and TV (57%) for news or information about U.S.-Canada relations than men (32% and 50%). On the other hand, men (22%) are more likely to turn to the radio for news or information about U.S.-Canada relations compared to women (18%).
- Americans aged 18 to 34 (48%) are more likely to turn to social media for news or information about U.S.-Canada relations than those aged 35 to 54 (37%) or 55 plus (25%). Americans aged 18 to 34 (20%) are also more likely to use word of mouth than those aged 55 plus (8%).
- Americans aged 55 plus are more likely to turn to TV (69%) and newspapers (30%) than Americans overall (53% and 30% respectively).
- Those born outside the U.S. (45%) are more likely to turn to social media (45%) and newspapers (36%) than those born in the U.S. (34% and 26%, respectively).
- Those with an income of under \$30,000 (21%) are more likely to turn to word of mouth than Americans overall (13%).

## Canada-U.S. relationship

In terms of the Canada-U.S. Relationship, both Canadians (63%) and Americans (47%) rank trade and economic cooperation as the top areas they think both countries should prioritize in their relationship. Canadians rank environmental and climate policies second (12%), whereas Americans were more likely than Canadians to rank border security second (21% Americans, 9% Canadians).

Canadians most often select “each other’s customers” in terms of what best describes the relationship between the U.S. and Canada (25%; 11% of Americans), while Americans most often select “allies” as the best descriptor (32%; 18% of Canadians). Americans were also more likely to select the descriptor “good neighbours” than Canadians (24%; 13% of Canadians), while Canadians were more likely to say none of the listed descriptors describe the relationship (16%; 3% of Americans). Comparing tracking data available for the U.S., Americans with an opinion are now less likely to describe the relationship between the U.S. and Canada as “good neighbours” (27% of those with an opinion, down from 42% in 2023).

*[CANADA] Q – Please rank the following areas that you think Canada and the U.S. should prioritize in their relationship, where 1 is the biggest priority, 2 is the second biggest priority and so on [RANDOMIZE]*

*[U.S.] Q – Please rank the following areas that you think the U.S. and Canada should prioritize in their relationship, where 1 is the biggest priority, 2 is the second biggest priority and so on [RANDOMIZE]*

**Table 32.1 – Priority Areas for Canada-U.S. Relationship – FIRST RANKED**

Priorities	Canada (n=1501)	U.S. (n=1782)
Trade and economic cooperation	63%	47%
Environmental and climate policies	12%	9%
Border security	9%	21%
Military and defense partnerships	7%	9%
Energy cooperation	5%	9%
Other (please specify)	-	-
Unsure	2%	3%
None of the above	3%	1%

Base: All Canadian respondents, n=1501 and American respondents, n=1782

**Table 32.2 – Priority Areas for Canada-U.S. Relationship – CANADA ONLY**

Priorities	First Ranked (n=1501)	Second Ranked (n=1414)	Third Ranked (n=1165)
Trade and economic cooperation	63%	19%	11%
Environmental and climate policies	12%	20%	16%
Border security	9%	16%	22%
Military and defense partnerships	7%	24%	24%
Energy cooperation	5%	21%	26%
Other (please specify)	<1%	<1%	<1%
Unsure	2%	<1%	1%
None of the above	3%	1%	<1%

Base: All Canadian respondents, n=1501.

**Table 32.3 – Priority Areas for U.S.-Canada Relationship – U.S. ONLY**

Priorities	First Ranked (n=1782)	Second Ranked (n=1723)	Third Ranked (n=1615)
Trade and economic cooperation	47%	25%	17%
Border security	21%	19%	14%
Environmental and climate policies	9%	15%	18%
Energy cooperation	9%	21%	28%
Military and defense partnerships	9%	19%	22%
Other (please specify)	<1%	<1%	<1%



Unsure	3%	1%	1%
None of the above	1%	<1%	1%

Base: All American respondents, n=1782.

The following demographic differences are observed:

#### Canada

- Residents of Alberta (10%) and Saskatchewan (10%) are more likely to think Canada and the U.S. should prioritize energy cooperation compared to residents in Quebec (2%).
- Women (14%) are more likely to think Canada and the U.S. should prioritize environmental and climate policies than men (10%).
- Canadians aged 35 to 54 (65%) and 55 plus (68%) are more likely to think Canada and the U.S. should prioritize trade and economic cooperation compared to those aged 18 to 34 (52%).
- Those with an income of \$100,000 or more (66%) are more likely to think Canada and the U.S. should prioritize trade and economic cooperation compared to those with an income of under \$40,000 (48%).
- Those born in Canada (64%) are more likely to think Canada and the U.S. should prioritize trade **and economic cooperation than those born outside of Canada (57%)**.

#### U.S.

- Americans from the South (27%) are more likely to think the U.S. and Canada should prioritize border security compared to residents of the Northeast (17%) and West (17%). On the other hand, those from the West (57%) are more likely to think the U.S. and Canada should prioritize trade and economic cooperation compared to those from the Midwest (47%) and South (41%).
- Men (53%) are more likely to think the U.S. and Canada should prioritize trade and economic cooperation than women (43%).
- Americans aged 18 to 34 (14%) and 35 to 54 (11%) are more likely to think the U.S. and Canada should prioritize environmental and climate policies compared to those aged 55 plus (6%). On the other hand, those aged 55 plus (26%) are more likely to think the U.S. and Canada should prioritize border security compared to those aged 18 to 34 (15%) and 35 to 54 (20%). Americans aged 55 plus (12%) are also more likely to think the U.S. and Canada should prioritize military and defence partnerships compared to those aged 35 to 54 (6%) and 18 to 34 (7%).



*[CANADA] Q – Which of the following best describes the relationship between Canada and the United States? They are ...[RANDOMIZE][select one]*

*[U.S.] Q – Which of the following best describes the relationship between the United States and Canada? They are ...[RANDOMIZE][select one]*

**Table 33.1 – Describing Canada-U.S. Relationship**

Descriptor	Canada (n=1526)	U.S. (n=1861)
...each other's customers	25%	11%
...allies	18%	32%
...good neighbours	13%	24%
...competitors	9%	4%
...partners	8%	9%
...friends	4%	6%
...equals on the world stage	2%	3%
None of the above	16%	3%
Unsure	6%	8%

Base: All Canadian respondents, n=1526 and American respondents, n=1861.

The following demographic differences are observed:

**Canada:**

- Canadians from Quebec are more likely to describe the relationship as competitors (15%) than residents of Ontario (6%) or Alberta (5%).
- Canadians aged 55 plus (31%) are more likely to describe the relationship as each other's customers compared to those aged 18 to 34 (20%) and 35 to 54 (23%).

**U.S.:**

- Americans aged 18 to 34 (15%) are more likely to describe the relationship as partners than those aged 55 plus (6%) and 35 to 54 (9%).
- Those born outside the U.S. (17%) are more likely to describe the relationship as partners compared to those born in the U.S. (8%); while those born in the U.S. are more likely to describe it as allies (33%; compared to 19% if born outside the U.S.).
- Those who make \$100,000 or more are more likely to describe the relationship as good neighbours (28%) or allies (37%) than those who make less than \$30,000 (17% and 25%, respectively).
- Those with a bachelor's degree or more (27%) are more likely to describe the relationship as partners than those with a high school education (21%).

**Table 33.2 – Describing Canada-U.S. Relationship – U.S. TRACKING [HAVE AN OPINION ONLY]**

Descriptors	2023 (n=3183)	2025 (n=1673)
...friends	8%	7%
...good neighbours	42%	27%
...allies	30%	36%
...partners	7%	10%
...each other's customers	6%	13%
...competitors	2%	5%
...equals on the world stage	3%	4%

Base: All American respondents, n=1673 [HAVE AN OPINION ONLY].

## J. Arctic Security [CANADA ONLY]

About three in four Canadians each agree that Canada should invest more resources into Arctic security (75%) and that Canada's Arctic is at risk from foreign enemies (75%). They are three times more likely to disagree (45%) rather than agree (13%) that Canada is doing an adequate job of securing its Arctic lands.

Q – On a scale from 0 to 10, where 0 is completely disagree and 10 is completely agree, to what extent do you agree or disagree with the following statements? [RANDOMIZE]

**Table 34 – Agreement with Statements About Canada's Arctic Security**

Statements (n=1526)	Canada should invest more resources into Arctic security	Canada's arctic is at risk from foreign enemies	Canada is doing an adequate job of securing its Arctic lands
Mean	8.1	8.0	3.6
Disagree (0-3)	5%	6%	46%
Neutral (4-6)	14%	13%	30%
Agree (7-10)	75%	75%	13%
I don't know/I have no opinion	7%	6%	11%

Base: All Canadian respondents, n=1526.

No demographic differences are observed.



## K. Energy [U.S. ONLY]

Americans are much more likely to oppose rather than support a tariff on Canadian energy if it means an increase in costs for the U.S. (56% oppose; 10% support) or results in increasing imports to the U.S. from countries like Russia or Venezuela (60% oppose; 7% support).

*Q – On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, please rate to what extent you support or oppose a tariff on Canadian energy, even if it means an increase in costs for the U.S.?*

*Q – On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, please rate to what extent you support or oppose a tariff on Canadian energy, even if it means increasing imports to the U.S. from other countries like Russia or Venezuela?*

**Table 35 – Support for a Tariff on Canadian Energy**

Support	Even if results in increased costs for U.S. (n=1863)	Even if results in increasing imports to U.S. from countries like Russia or Venezuela (n=1862)
Mean	2.7 out of 10	2.3 out of 10
Oppose (0-3)	56%	60%
Neutral (4-6)	22%	18%
Support (7-10)	10%	7%
I don't know/I have no opinion	11%	15%

*Base: All American respondents, n=1863.*

No demographic differences are observed.

## L. Travel

Canadians are more likely to report crossing the border into the U.S. by land (6% regularly; 63% occasionally) than Americans are to report crossing the border by land into Canada (1% regularly; 25% occasionally). 72% of Americans report they never cross the border into Canada by land, compared to 30% of Canadians. Among those who report crossing the border by land at least occasionally, nearly all describe the experience as easy or somewhat easy (93% of Canadians; 91% of Americans).

A majority of Canadians report they are aware that the Government of Canada provides travel advice for Canadians, including those currently in the U.S. (84%), while just under one in five report they were not aware of this (16%).



*Q – Are you aware or not aware that the Government of Canada provides travel advice for Canadians, including for those travelling, living or working in the United States?*

**Table 36 – Awareness of Government of Canada Travel Advice – CANADA ONLY**

<b>Statements (n=1529)</b>	<b>Canada (n=1529)</b>
Aware	84%
Not aware	16%

*Base: All Canadian respondents, n=1529.*

*[CANADA] Q – How often do you cross the Canadian border into the U.S. by land?*

*[U.S.] Q – How often do you cross the U.S. border into Canada by land?*

**Table 37 – Frequency of Crossing Canada-U.S. Border by Land**

<b>Frequency</b>	<b>Canada (n=1532)</b>	<b>U.S. (n=1861)</b>
Regularly	6%	1%
Occasionally	63%	25%
Never	30%	72%
Unsure	2%	3%

*Base: All Canadian respondents, n=1532 and American respondents, n=1861.*





*[CANADA] Q – [IF CROSSES BORDER REGULARLY OR OCCASIONALLY] In your personal experience, how easy or difficult has it been to cross the Canadian border into the U.S.?*

*[U.S.] Q – [IF CROSSES BORDER REGULARLY OR OCCASIONALLY] In your personal experience, how easy or difficult has it been to cross the U.S. border into Canada?*

**Table 38 – Ease Crossing Canada-U.S. Border by Land**

Level of difficulty	Canada (n=1049)	U.S. (n=530)
Easy	53%	41%
Somewhat easy	40%	51%
Somewhat difficult	6%	6%
Difficult	1%	-
Unsure/do not recall	1%	2%
NET Easy	93%	92%

*Base: Canadian respondents who report regularly or occasionally crossing the border by land, n=1049 and American respondents who report regularly or occasionally crossing the border by land, n=530.*

Rating the ease of crossing the Canada-U.S. border by land as “easy” is higher among the following subgroups:

**Canada:**

- Women (58%) compared to men (49%).
- Those who were born in Canada (54%) compared to those born outside Canada (43%).

**U.S.:**

- Men (46%) compared to women (34%).



## M. Advice for Elected Officials

In terms of Canada-U.S. relations, Canadians are most likely to advise elected officials to not back down and stand up to the U.S. (35%). This was followed by the advice to work on the relationship/keep the peace/cooperate (16%), remain fair/level-headed (14%) and use this as an opportunity for Canada/make things better (11%).

In terms of U.S.-Canada relations, Americans are most likely to advise elected officials to work on the relationship/keep the peace and cooperate (46%). This was followed by remain fair/level-headed (16%), ensure fair deal for the U.S. (13%) and abolish the tariffs (13%).

*[CANADA] Q – If you had one piece of advice to elected officials on Canada-U.S. relations, what would it be? [OPEN-ENDED]*

*[U.S.] Q – If you had one piece of advice to elected officials on U.S.-Canada relations, what would it be? [OPEN-ENDED]*

**Table 39.1 – Advice for Elected Officials on Canada-U.S. Relations [CANADA]**

Advice	Canada (n=1130)
Do not back down/stand up to U.S.	35%
Work on the relationship/keep the peace/cooperate	16%
Remain fair/level-headed	14%
Use this as an opportunity for Canada/make things better	11%
Ensure fair deal for Canada	9%
Survive/help Canada make it through	6%
Avoid retaliation/no retaliatory tariffs	5%
Build up the military/spend more on defence	4%
Nothing/no advice	<1%

Base: All Canadian respondents, n=1130.

**Table 39.2 – Advice for Elected Officials on Canada-U.S. Relations [U.S.]**

Advice	U.S. (n=1100)
Work on the relationship/keep the peace/cooperate	46%
Remain fair/level-headed	16%
Ensure fair deal for the U.S.	13%
Abolish tariffs	13%



Counter/stop actions of the U.S. administration	10%
Nothing/no advice	3%

*Base: All American respondents, n=1100.*

**Canada:**

- Women (39%) are more likely than men (31%) to advise elected officials to not back down/stand up to U.S.
- Those in Alberta (21%) are more likely to advise elected officials to use this as an opportunity to make things better compared to those in Quebec (7%) and Ontario (10%).

**U.S.:**

- Those in the Northeast (56%) are more likely to advise elected officials to work on the relationship/keep the peace/cooperate compared to those in the South (41%).
- Americans aged 55 plus (17%) are more likely to advise elected officials to ensure a fair deal for the U.S. than those aged 18 to 34 (6%).
- Women (18%) are more like than men (14%) to advise elected officials to remain fair/level-headed.
- Those not born in the U.S. (59%) are more likely to advise officials to work on the relationship/keep the peace/cooperate than those born in the U.S. (45%).
- Those with an income of \$30,000 to \$60,000 (21%) are more likely to advise ensuring a fair deal for the U.S. than those at other income levels (10% less than \$30,000, 12% \$60-\$100,000, 10% 100,000 or more).



## Appendix A: Methodology

This research project is compliant with the terms of the Standards for the Conduct of Government of Canada Public Opinion Research— Online Surveys.

### Canada

Nanos Research conducted an RDD dual frame (land-and cell-lines) random hybrid telephone and online survey of 1,532 Canadians, 18 years of age and older. Respondents were recruited using the Nanos Insights Lab Probability Panel, which contains about 48,000 Canadians who were randomly recruited to join the panel by RDD land- and cell-lines with live agents. All respondents self-administered the survey online.

All Nanos surveys are registered in the CRIC Research Verification Service and contain a Research Verification Service (RVS) number. This registration number can be used to check the legitimacy of the research and provide feedback on the research.

### U.S.

Nanos subcontracted National Opinion Research Centre (NORC) at the University of Chicago to conduct the U.S. fieldwork using NORC's AmeriSpeak® Panel for the sample. 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. These sampled households are then contacted by U.S. mail, telephone, and field interviewers (face to face). The panel provides sample coverage of approximately 97% of the U.S. household population. Those excluded from the sample include people with P.O. Box only addresses, some addresses not listed in the USPS Delivery Sequence File, and some newly constructed dwellings. While most AmeriSpeak households participate in surveys by web, non-internet households can participate in AmeriSpeak surveys by telephone. Households without conventional internet access but having web access via smartphones are allowed to participate in AmeriSpeak surveys by web. AmeriSpeak panelists participate in NORC studies or studies conducted by NORC on behalf of governmental agencies, academic researchers, and media and commercial organizations.

The U.S. survey is comprised of 1,870 Americans, 18 years of age and older and was conducted across the U.S.

Nanos Research monitors ten percent of all fieldwork for quality control and assurance in accordance with the standards of CRIC, European Society for Opinion and Marketing Research and American Association for Public Opinion Research.



### Sample Characteristics

The following table outlines the weighted and unweighted sample composition for the survey.

#### Canada

Demographic	Unweighted	Weighted
Age		
18 to 34	20%	25%
35 to 54	33%	36%
55 plus	48%	39%
Gender		
Male	52%	48%
Female	47%	51%
Education		
High School diploma, equivalent or less	8%	8%
Registered Apprenticeship or other trades certificate or diploma/College, CEGEP or other non-university certificate or diploma	36%	35%
University certificate or diploma/bachelor's degree or post-graduate degree below bachelor's level	49%	50%
Total household income		
Less than \$40,000	8%	8%
\$40,000 to \$60,000	8%	8%
\$60,000 to \$100,000	26%	25%
\$100,000 or more	47%	49%
Region		
Atlantic	7%	7%
Quebec	23%	23%
Ontario	38%	39%
Manitoba/Saskatchewan	7%	6%
Alberta	11%	11%
British Columbia	14%	14%
Territories	<1%	<1%



U.S.

Demographic	Unweighted	Weighted
Age		
18 to 34	19%	23%
35 to 54	28%	32%
55 plus	54%	45%
Gender		
Male	51%	48%
Female	49%	52%
Education		
High School diploma, equivalent or less	20%	33%
Registered Apprenticeship or other trades certificate or diploma/College, CEGEP or other non-university certificate or diploma	40%	27%
University certificate or diploma/bachelor's degree or post-graduate degree below bachelor's level	40%	40%
Total household income		
Less than \$30,000	18%	20%
\$30,000 to \$60,000	25%	24%
\$60,000 to \$100,000	26%	24%
\$100,000 or more	32%	33%
Region		
Northeast	14%	17%
Midwest	27%	21%
South	34%	38%
West	25%	24%



## Screening

Once invited, participants were administered a set of screening questions to filter out anyone who was not eligible to participate in the study. For the purposes of this study the following screening criteria were applied:

- The first set of screening criteria that were applied are industry standard screening criteria. This involves several components, the first of which is age – in this case, all respondents confirmed they are 18 years of age or older at the time they are taking the survey. Any respondent who indicated they are under 18 years of age or refused to answer the question was not allowed to proceed through the survey.
- Respondents were also screened on their employment situation and the employment situation of their immediate family members/household members. The industry standards required that any respondents who indicated they are employed, or have family members employed, in the market research, advertising and/or media sectors were not allowed to proceed through the survey.

As noted, respondents who fell into any of the above categories were immediately terminated from the research/prevented from proceeding any further and they were no longer eligible to participate in the study.

## Fieldwork Dates

Fieldwork was conducted in Canada between March 16<sup>th</sup> and 22<sup>nd</sup>, 2025 and in the U.S. between April 17<sup>th</sup> and 21<sup>st</sup>, 2025.

## Margin of error

The margin of error for the random sample of 1,532 Canadians, 18 years of age and older, is 2.5 percentage points plus or minus, nineteen times out of twenty. The margin of error for the random sample of 1,870 Americans, 18 years of age and older, is 2.3 percentage points plus or minus, nineteen times out of twenty.

## Questionnaire design

Global Affairs Canada provided Nanos Research with desired topic areas for the questionnaire as well as tracking questions from the previous wave conducted in the U.S. in 2023. A separate questionnaire was designed for Canada and the U.S., with some core questions as well as unique modules for each country. Upon approval of the English questionnaires, Nanos Research translated the Canadian questionnaire into French which was then reviewed by Global Affairs Canada and translated the U.S. questionnaire into Spanish.

Nanos programmed the questionnaires into our online system, then thoroughly tested the programming in English and French in Canada and English and Spanish in the U.S. to ensure accuracy ahead of the pre-test and rollout. This procedure ensured that the survey logic accurately reflected the questionnaire and data was collected properly. The final survey questionnaires are included in Appendix B.



## Interview Duration

Interview length for the Canadian survey averaged 17 minutes and ranged from 7 to 26 minutes. For the U.S. survey it averaged 15 minutes and ranged from 7 to 25 minutes.

## Weighting Procedures

### Canada

Our sampling methodology stratified the population along three key variables which allowed triangulation of the weighting approach and yielded robust, geographic and demographic representation across the country.

The sample was stratified along three axes – by region/province, by sex and by age. Fixed completion quotas were assigned to each province, which were anchored by their population distribution relative to the national total.

In order to ensure balanced representation within each province/region, the sample was further stratified by sub-regions. This prevented over/under-sampling of geographies (ex. City of Toronto), within the provincial total.

Within each province soft gender/sex quotas were then set which approximate that area's sex distribution. The data collection allowed for a variance of +/- 5% for sex within each region, again preventing over representation by either men or women. The third stratification axis was by age category. The age categories were used to group respondents and for weighting purposes.

Each of the age categories were weighted, within their sex and their province/region, the outcome of which yielded a dataset which accurately reflects the demographic composition of the population at large.

### U.S.

The final weight variable that is delivered with the data is a product of three weights:

- *AmeriSpeak Panel Weights*: Weights developed for all panel members to account for their probability of selection into the panel recruit sample, panel recruitment non-response adjustments, and poststratification adjustments of the recruited panel to match population benchmarks.
- *Study Specific Base Weights*: Sampling weights developed for a study sample selected from the panel to account for their selection probabilities under the sample design. The base weights are a product of the AmeriSpeak Panel weights and the inverse of selection probabilities associated with sample selection from the panel.
- *Study Specific Final Weights*: These are final weights developed for all completed cases of a specific study. The final weights are adjustments of the base weights to address survey non-response through a weighting class method. Ranking adjustments are then applied to the non-response adjusted weights to align the survey sample to specific population benchmarks. The final weights may be trimmed to reduce the influence of extreme weights on survey estimates.

Since the sampling frame for this study is the AmeriSpeak Panel, which itself is a sample, the starting point of the weighting process for the study is the AmeriSpeak panel weight. To develop the panel weight, NORC first computed the panel base weight as the inverse of the probability of selection from





the NORC National Frame (the sampling frame that is used to sample housing units for AmeriSpeak) or other address-based sample frames (supplemental panel samples were selected from frames developed from the USPS Delivery Sequence Files). The sample design and recruitment protocol for the AmeriSpeak Panel involve unequal sampling rates across the sampling strata and additional subsampling of initial non-responding housing units for in-person non-response follow-up (NRFU). The panel base weights reflect all the variations in panel sample selection probabilities. The panel base weights are then adjusted to account for unknown eligibility and non-response among eligible housing units. These adjustments were conducted using weighting classes defined by some household characteristics provided by commercial data vendors, including partisan score, political party identification, the presence of young adult(s), and minority status. To produce the final household panel weights, the household-level non-response adjusted weights are post-stratified to match the number of households per census division obtained from the most recent Current Population Survey (CPS). Final household weights are assigned to each eligible adult in the recruited household. These person-level weights are then adjusted to compensate for nonresponding adults within a recruited household. Finally, the non-response adjusted person-level panel weights are raked to population totals

### Quality Controls

Prior to launching the survey, a pre-test was conducted for the Canadian survey with 24 individuals (15 English, 9 French). The purpose of the pre-test was to ensure that the content of the questionnaire was understandable, that the duration of the interview fits the target, to ensure comparability between the French and the English questionnaire, and to ensure that the logic of the survey flowed smoothly. The pre-test was completed on March 14<sup>th</sup>, 2025.

The same pre-test procedure was followed for the U.S. survey, with 20 individuals (15 English, 5 Spanish) on April 16<sup>th</sup>, 2025.

Upon completion of the pre-test, Nanos and Global Affairs Canada reviewed the findings and determined no modifications were needed and the survey was deployed to the full sample.

### Canada

#### Pre-field procedures – Online

- projects are staffed with employees best suited for the nature and subject matter of the project
- the Survey Field Manager
  - analyzes the general project summary, questionnaires, sample requirements, quota requirements and any special instructions
  - contacts the Client to clarify any grey areas
  - meticulously programs the questionnaire, incorporating all questionnaire logic and project requirements
  - extensively tests the programming to ensure that all possible scenarios are properly programmed
  - forwards the structure of the data file to the Client for approval prior to commencement of the fieldwork
  - if necessary, performs a duplication control check on the sample lists according to the Client's specifications
  - reviews or prepares the survey invitation; gets final approval from client



- if a pre-test (or “soft launch”) is requested, guides the session and provide immediate feedback on questionnaire logic, average duration, sample issues, incidence, etc. to the Client
- well documents all modifications made during the initial project stage and pre-test to support later inquiries on project specifications (questionnaire, sample and quotas)
- if required, arranges for translation of the questionnaire in the language(s) needed. For verification of translation accuracy, send the translated version(s) to the Client for their review and approval. Also, if requested, arrange a back-translation by separate translators to ensure accurate translation.

### Fieldwork procedures – Online

- Before invitation emails are sent, unique PIN numbers are tagged onto the survey links in order to identify and track survey attempts from individual respondents. With a unique PIN, each respondent can only complete the survey once.
- Project Managers oversee the validation and correction of erroneous email addresses. Log records are maintained for each email sent.
- When approximately 10% of the quota target is completed, the Computer Assisted Web Interviewing (CAWI) questionnaire is checked to ensure question wording, response codes and questionnaire logic are correctly programmed. Actual survey data is used to verify the programming.
- If there are errors or omissions due to questionnaire logic or CAWI programming, data collection is temporarily suspended while the programming is immediately corrected and re-tested.
- Data is also tested for respondent consistency, scanned for patterns (either general or within a specific case). If any record shows an illogical response or a peculiar pattern, it will be investigated, and if it is determined to be unsound, it will be removed from the completed interviews.
- Project Managers regularly check the project connection logs within the online survey system to review the connect time of all respondents who have completed a survey for each project. The connect time (duration) is monitored to find any record that may be questionable (e.g., a survey with a much lower than average duration). If such a record is found, the data for that case will be reviewed and tested, and if it is determined not to be a valid complete, it will be removed from the completed count and cumulative data
- To reduce non-response error for a web survey, a few techniques are employed.
  - Reminder emails are sent, again containing the survey link
  - Project Managers regularly check on the completion status of web questionnaires. If a partially completed web questionnaire remains uncompleted for over three (or five) days, a reminder email is sent

### U.S.

NORC applied cleaning rules to the survey data for quality control with review and guidance from Nanos Research. In total, 220 cases were removed from the final set of completed interviews.

AmeriSpeak is a probability-based panel where respondents must be chosen by the firm to join, where access to surveys is controlled by the panelist's secure log-in information through a web portal or app. E-mails, text invitations, or interview-operated telephone calls go directly to the address/number of the



recruited panelist. When being called by phone, the panelist is requested by name. AmeriSpeak surveys are programmed and panelists are invited in such a way that panelists cannot take the survey more than once, and each panelist is always identifiable based on a unique ID. For these reasons, AmeriSpeak does not face the problem of “bots,” fabricated profiles, non-invited respondents, or individuals or members of the household repeatedly and illegitimately taking the same survey.

### **Response Rate**

The response rate for the Canada survey was 13%. This was calculated using the Canadian Research Insights Council (CRIC) formula, which has been approved by the Government of Canada ( $\text{Response Rate/Participation Rate} = R/(U + IS + R)$ ). The response rate for the U.S. survey was 3%. The overall survey response rate that accounts for survey outcomes in all response stages (e.g., screener completion rate and interview completion rate), *plus* it includes panel outcome measures such as panel recruitment rate and panel retention rate. This overall rate is weighted to account for the sample design and differential inclusion probabilities of sample members. ( $WCR = SurC \times WPRet \times WPreCr$ )



## Appendix B: Survey questionnaire

### Canadian Survey

#### INTRODUCTION

*[CANADA] Thank you for your interest in participating in this 15 minute research survey on behalf of the Government of Canada. This is entirely voluntary and all the views and information you share with Nanos Research will be confidential and protected in accordance with Canada privacy laws. Thank you, in advance, for sharing your time.*

*This research project is registered with the CRIC Research Verification Service that allows you to verify its legitimacy and share your feedback. If you have feedback on this research, you can share it by going to <https://canadianresearchinsightscouncil.ca/rvs> and using the RVS code: XYZ*

A. Are you 18 years of age or older?

- ☐ Yes ☐ No (*Terminate – not qualified*)

B. Do you or does anyone in your immediate family, work in any of the following occupations?

- ☐ Market research firm (*Terminate – not qualified*)  
☐ TV, radio or news media (*Terminate – not qualified*)  
☐ Advertising company (*Terminate – not qualified*)  
☐ Political party (*Terminate – not qualified*)

1. In which province or territory do you live? [INSERT LIST]

2. Which do you think is a priority issue for you today? [RANDOMIZE][SELECT A MAX OF 3]

- |  |          |
|--|----------|
| Health care .....  | 1        |
| Lack of affordable housing .....                         | 2        |
| Gun violence .....                                       | 3        |
| Racism.....  | 4        |
| Crime .....  | 5        |
| Labor shortage.....                                      | 6        |
| Climate change .....                                     | 8        |
| Budget deficit .....                                     | 9        |
| Terrorism .....  | 10       |
| Disinformation (false information) in the news .....     | 11       |
| Misinformation (incorrect information) in the news ..... | 12       |
| Homelessness.....  | 13       |
| Lack of good jobs .....                                  | 14       |
| Increasing trade between Canada and US.....              | 15       |
| Strengthening the security of the Canada-US border ..... | 16 [NEW] |
| Immigration .....  | 17 [NEW] |
| Fentanyl .....   | 18 [NEW] |
| Other: please specify .....                              | 20       |
| Unsure .....   | 77       |

#### General Trade

How likely would you support Canada having a closer trading relationship with another country if...[RANDOMIZE]



3. ...its workers are part of the same labour unions as Canadian workers?
4. ...its goods come from a close neighbour of Canada instead of from far away or overseas?
5. ...its goods has less impact on the environment than another trading partner?
6. ...its goods are the most competitively priced on the global market?
  - Much more likely .....1
  - Somewhat more likely .....2
  - Somewhat less likely .....3
  - Much less likely .....4
  - I don't know/I have no opinion .....77

Do you agree or disagree with the following statements? [RANDOMIZE]

7. The US is Canada's most secure and reliable trading partner
8. Trade between Canada and the US provides economic benefits to Canada
9. Canada periodically needs to impose tariffs on imports from the US to protect Canadian national security
  - Strongly agree .....1
  - Somewhat agree .....2
  - Somewhat disagree .....3
  - Strongly disagree .....4
  - I don't know/I have no opinion .....77
10. On a scale from 0 to 10, where 0 is a very negative impact and 10 is a very positive impact, what level of impact do you think the current Canada-US trade relationship has on the Canadian economy?
  - 0 (very negative impact) .....0
  - 1 .....1
  - 2 .....2
  - 3 .....3
  - 4 .....4
  - 5 .....5
  - 6 .....6
  - 7 .....7
  - 8 .....8
  - 9 .....9
  - 10 (very positive impact) .....10
  - I don't know/I have no opinion .....77
11. On a scale from 0 to 10, where 0 is not concerned at all and 10 is very concerned, how concerned or not concerned are you about the current Canada-US trade relationship?
  - 0 (not concerned at all) .....0
  - 1 .....1
  - 2 .....2
  - 3 .....3
  - 4 .....4
  - 5 .....5
  - 6 .....6
  - 7 .....7
  - 8 .....8
  - 9 .....9
  - 10 (very concerned) .....10
  - I don't know/I have no opinion .....77



12. What specific concerns do you have about the current Canada-US trade relationship, if any? [OPEN]
13. What are the benefits to Canada in terms of the current Canada-US trade relationship, if any? [OPEN]
14. What are the downsides to Canada in terms of the current Canada-US trade relationship, if any? [OPEN]

#### Tariffs

15. On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose Canada imposing retaliatory tariffs on US goods?

0 (strongly oppose) .....0  
 1 .....1  
 2 .....2  
 3 .....3  
 4 .....4  
 5 .....5  
 6 .....6  
 7 .....7  
 8 .....8  
 9 .....9  
 10 (strongly support) .....10  
 I don't know/I have no opinion .....77

On a scale from 0 to 10, where 0 is completely disagree and 10 is completely agree, to what extent do you agree or disagree with the following statements? [RANDOMIZE]

16. The US subsidizes Canada
17. Canada "owes" the US
18. Canada should become part of the US
19. Free trade between Canada and the US has cost Canada jobs
20. Free trade between Canada and the US has lowered the cost of goods for Canadian consumers
21. I am worse off today compared to 4 years ago
22. I will have to pay more for things like groceries and gas if tariffs are imposed on the US by Canada
23. I trust mainstream media to provide me with accurate information about Canada-US relations
24. I trust social media to provide me with accurate information about Canada-US relations
25. I trust the federal government to provide me with accurate information about Canada-US relations

0 (completely disagree) .....0  
 1 .....1  
 2 .....2  
 3 .....3  
 4 .....4  
 5 .....5  
 6 .....6  
 7 .....7  
 8 .....8  
 9 .....9  
 10 (completely agree) .....10  
 I don't know/I have no opinion .....77

Canada is imposing retaliatory tariffs on imports from the United States in response to the US imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these retaliatory tariffs if...[RANDOMIZE]



26. ... they contribute to higher housing costs for Canadian homebuyers?  
 27. ... if they increase taxes for Canadian businesses?  
 28. ... if they increase taxes for Canadian consumers?  
 29. ...they result in job losses in your local community?  
 30. ...they support jobs in your local community?

Strongly support .....1  
 Somewhat support .....2  
 Somewhat oppose .....3  
 Strongly oppose .....4  
 I don't know/I have no opinion .....77

#### CUSMA

As you may know, the Canada-United States–Mexico Agreement (CUSMA) between Canada, the United States of America, and Mexico is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be renewed in 2026.

Do you agree or disagree with the following statements? [RANDOMIZE]

31. Free trade between Canada, the U.S., and Mexico provides benefits to Canadian businesses  
 32. Free trade between Canada, the U.S., and Mexico provides benefits to Canadian citizens.  
 33. Canada and the U.S. should further integrate their economies through trade agreements

Strongly agree.....1  
 Somewhat agree.....2  
 Somewhat disagree .....3  
 Strongly disagree .....4  
 I don't know/I have no opinion .....77

34. On a scale from 0 to 10, where 0 is not important at all and 10 is very important, how important or unimportant do you think it is for the Canadian Government to renew a free trade agreement with the United States and Mexico in 2026?

0 (not important at all) .....0  
 1 .....1  
 2 .....2  
 3 .....3  
 4 .....4  
 5 .....5  
 6 .....6  
 7 .....7  
 8 .....8  
 9 .....9  
 10 (very important) .....10  
 I don't know/I have no opinion .....77

To what extent do you agree or disagree with the following statements. [ROTATE]

35. The U.S. is Canada's best friend and ally.  
 36. The U.S. is an essential partner for Canada

Strongly agree.....1  
 Somewhat agree.....2  
 Somewhat disagree .....3  
 Strongly disagree .....4



I don't know/I have no opinion .....77

### Border Security

37. Which of the following issues are you most concerned about in relation to the Canada-U.S. border?

[ROTATE][SELECT ONE]

- Illegal drugs..... 1
- Human trafficking and smuggling..... 2
- Organized crime ..... 3
- Firearms..... 4
- None of the above/none are a concern ..... 5
- Other (Specify)..... 20
- I don't know/I have no opinion ..... 77

Thinking about the border between Canada and the United States, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]

- 38. ... The border poses a threat to national security in Canada?
  - 39. ... The border contributes to the Canadian economy?
  - 40. ... The border encourages illegal immigration into Canada?
  - 41. ... The border enables smooth trade between the countries?
  - 42. ... The border enables smooth travel between the countries?
  - 43. ... The border contributes to reducing crime in both countries?
  - 44. ... The border contributes to fentanyl trafficking in the U.S.?
- Strongly agree.....1
  - Somewhat agree.....2
  - Somewhat disagree .....3
  - Strongly disagree .....4
  - I don't know/I have no opinion .....77

To what extent do you agree or disagree with the following statements? [RANDOMIZE]

- 45. The U.S. is doing a good job of securing the Canada-U.S. border
  - 46. Canada is a major source of fentanyl to the U.S.
  - 47. The U.S. is a major source of fentanyl into Canada
- Strongly agree.....1
  - Somewhat agree.....2
  - Somewhat disagree .....3
  - Strongly disagree .....4
  - I don't know/I have no opinion .....77

In December 2024, the Canadian government announced a plan to strengthen border security. This plan includes an investment of \$1.3 billion and aims to increase border security, disrupt the fentanyl trade, provide new tools to law enforcement, among others. The measures in the plan include enhanced surveillance technologies, increased border patrols and a joint strike force between Canada and the U.S. and additional intelligence gathering and analysis.

- 48. Prior to today, had you heard or not heard about Canada's new border security plan?
- Heard .....1
  - Not heard.....2





49. To what extent do you think the measures proposed in Canada's Border Plan will deter people from crossing into the U.S. irregularly or undetected?

A great deal .....1  
Somewhat.....2  
Not very much .....3  
Not at all .....4  
Unsure .....77

50. To what extent do you support or oppose the overall goals of Canada's Border Plan?

Support.....1  
Somewhat support .....2  
Somewhat oppose.....3  
Oppose .....4  
Unsure .....77

To what extent do you support or oppose Canada increasing the use of the following types of technology to manage the Canada-U.S. border? [RANDOMIZE]

51. App or web-based forms (including customs declarations, submission of traveller information)

52. Facial recognition technology/biometrics

53. Electronic gates

54. Drones

Support .....1  
Somewhat support .....2  
Somewhat oppose.....3  
Oppose .....4  
Unsure .....77

#### Government Communications on Canada-U.S. Issues [CANADA ONLY]

55. What source(s) do you typically go to for news? (Please select all that apply) [RANDOMIZE]

Social media ..... 1  
TV ..... 2  
Newspaper ..... 3  
Radio ..... 4  
Word of mouth ..... 5  
Other (Please specify \_\_\_\_ ) .....6  
None..... 7

56. Please rank the top three social media channels you use the most frequently (maximum three) [RANDOMIZE]

Rank

Facebook .....  
Twitter/X .....  
YouTube .....  
WhatsApp .....  
Reddit .....  
Instagram .....  
Snapchat .....  
LinkedIn .....  
Telegram .....  
TikTok .....



Bluesky.....  
Another social media application ...  
None, do not use social media .....

57. On a scale from 0 to 10, where 0 is a very poor job and 10 is a very good job, how well a job has the Government of Canada been doing at informing the Canadian public about Canada-U.S. trade relations?

0 (very poor job) .....0  
1 .....1  
2 .....2  
3 .....3  
4 .....4  
5 .....5  
6 .....6  
7 .....7  
8 .....8  
9 .....9  
10 (very good job).....10  
I don't know/I have no opinion .....77

58. On a scale from 0 to 10, 0 is no confidence at all and 10 is a great deal of confidence, how much confidence do you have in the federal government to handle trade relations with the U.S.?

0 (no confidence at all) .....0  
1 .....1  
2 .....2  
3 .....3  
4 .....4  
5 .....5  
6 .....6  
7 .....7  
8 .....8  
9 .....9  
10 (a great deal of confidence).....10  
I don't know/I have no opinion .....77

### Collaboration

59. What type of impact do you think the current U.S. government will have on Canada-U.S. relations?

Positive .....1  
Somewhat positive .....2  
Somewhat negative .....3  
Negative.....4  
No impact .....5  
Unsure .....77

60. What source(s) do you go to for news or information about Canada-U.S. relations? (Please select all that apply) [RANDOMIZE]

Social media ..... 1  
TV ..... 2  
Newspaper ..... 3  
Radio ..... 4



Word of mouth ..... 5  
 Other (Please specify \_\_\_\_\_) .....6  
 None..... 7

61. Please rank the following areas that you think Canada and the U.S. should prioritize in their relationship, where 1 is the biggest priority, 2 is the second biggest priority and so on [RANDOMIZE]

Trade and economic cooperation.....  
 Border security .....  
 Environmental and climate policies .....  
 Energy cooperation .....  
 Military and defense partnerships .....  
 Other (please specify).....  
 Unsure .....  
 None of the above.....

62. Which of the following best describes the relationship between Canada and the United States? They are ...[RANDOMIZE][select one]

...friends .....1  
 ...good neighbours .....2  
 ...allies .....3  
 ...partners .....4  
 ...each other's customers .....5  
 ...competitors.....6  
 ...equals on the world stage.....7  
 None of the above .....8  
 Unsure .....77

### Arctic Security [CANADA ONLY]

On a scale from 0 to 10, where 0 is completely disagree and 10 is completely agree, to what extent do you agree or disagree with the following statements? [RANDOMIZE]

63. Canada should invest more resources into Arctic security  
 64. Canada's arctic is at risk from foreign enemies  
 65. Canada is doing an adequate job of securing its Arctic lands

0 (completely disagree) .....0  
 1 .....1  
 2 .....2  
 3 .....3  
 4 .....4  
 5 .....5  
 6 .....6  
 7 .....7  
 8 .....8  
 9 .....9  
 10 (completely agree).....10  
 I don't know/I have no opinion .....77

### Travel

66. Are you aware or not aware that the Government of Canada provides travel advice for Canadians, including for those travelling, living or working in the United States?



- Aware .....1  
Not aware .....2
67. How often do you cross the Canadian border into the U.S. by land?  
Regularly .....1 [GO TO Q68]  
Occasionally .....2 [GO TO Q68]  
Never .....3 [SKIP TO Q69]  
Unsure .....77 [SKIP TO Q69]
68. [IF CROSSES BORDER REGULARLY OR OCCASIONALLY] In your personal experience, how easy or difficult has it been to cross the Canadian border into the U.S.?  
Easy .....1  
Somewhat easy .....2  
Somewhat difficult .....3  
Difficult .....4  
Unsure/do not recall .....77
69. If you had one piece of advice to elected officials on Canada-U.S. relations, what would it be? [OPEN-ENDED]
- Our last few questions will help us group your responses.
70. In what year were you born? \_\_\_\_
71. How do you identify your gender?  
Woman .....1  
Man .....2  
Nonbinary .....3  
Prefer not to answer .....99
72. Which of the following categories best describes your household income, that is, the income from all people living at your residence?  
Under \$20,000 .....1  
\$20,000 to just under \$40,000 .....2  
\$40,000 to just under \$60,000 .....3  
\$60,000 to just under \$80,000 .....4  
\$80,000 to just under \$100,000 .....5  
\$100,000 to just under \$120,000 .....6  
\$120,000 to just under \$150,000 .....7  
\$150,000 and above .....8  
Prefer not to answer .....99 [Unprompted]
73. Which of the following is the highest level of education you have achieved?  
Some high school .....1  
Completed high school .....2  
Some college or university .....3  
Completed college .....4  
Completed university .....5  
Completed graduate studies .....6  
Refuse/No Answer .....99



74. For verification purposes only, please enter the first three digits of your postal code: \_\_\_\_
75. Which of the following best describes yourself?
- A Canadian citizen born in Canada, and all my parents and grandparents were born in Canada .....1
  - An immigrant (born in another country) .....2
  - A first-generation Canadian citizen born in Canada (at least one parent born in another country).....3
  - A second-generation Canadian citizen born in Canada (at least one grandparent born in another country) .....5
  - Prefer not to say .....77
76. With which of the following do you best identify yourself?
- White .....1
  - South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.).....2
  - Chinese .....3
  - Black .....4
  - Filipino .....5
  - Latin American.....6
  - Arab .....7
  - Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai, etc.) .....8
  - West Asian (e.g., Iranian, Afghan, etc.) .....9
  - Korean .....10
  - Japanese .....11
  - First Nations, Metis or Inuk .....12
  - Other — specify .....20
  - Prefer not to say .....77

**Thank you very much for your time.**



## U.S. Survey (English)

### INTRODUCTION

AmeriSpeak has been hired to administer this survey on a public opinion matter. The survey takes about 15 minutes to complete, and your participation is voluntary and confidential. Please note to further protect the privacy of participants in this study, NORC has obtained a Certificate of Confidentiality. This information is available to AmeriSpeak panelists at: <https://www.amerispeak.org/privacy>.

This research project is registered with the CRIC Research Verification Service that allows you to verify its legitimacy and share your feedback. If you have feedback on this research, you can share it by going to <https://canadianresearchinsightscouncil.ca/rvs> and using the RVS code: XYZ

A. Are you 18 years of age or older?

- ☐ Yes ☐ No (Terminate – not qualified)

B. Do you or does anyone in your immediate family, work in any of the following occupations?

- ☐ Market research firm (Terminate – not qualified)  
☐ TV, radio or news media (Terminate – not qualified)  
☐ Advertising company (Terminate – not qualified)  
☐ Political party (Terminate – not qualified)

1. [TRACKING – TWEAKED WITH 3 NEW OPTIONS] Which do you think is a priority issue for you today?  
 [RANDOMIZE][SELECT A MAX OF 3]

- |  |          |
|--|----------|
| Health care .....  | 1        |
| Lack of affordable housing .....                         | 2        |
| Gun violence .....                                       | 3        |
| Racism.....  | 4        |
| Crime .....  | 5        |
| Labor shortage.....                                      | 6        |
| Climate change .....                                     | 8        |
| Budget deficit .....                                     | 9        |
| Terrorism .....  | 10       |
| Disinformation (false information) in the news .....     | 11       |
| Misinformation (incorrect information) in the news ..... | 12       |
| Homelessness.....  | 13       |
| Lack of good jobs .....                                  | 14       |
| Increasing trade between the U.S. and Canada .....       | 15       |
| Strengthening the security of the U.S.-Canada border ... | 16 [NEW] |
| Immigration .....  | 17 [NEW] |
| Fentanyl .....   | 18 [NEW] |
| Other: please specify .....                              | 20       |
| Unsure .....   | 77       |

### General Trade

[TRACKING - TWEAKED] How likely would you support the United States having a closer trading relationship with another country if...[RANDOMIZE]

2. ...its workers are part of the same labor unions as American workers?  
 3. ...its goods come from a close U.S. neighbor rather than far away or overseas?



4. ...its goods had less of a negative impact on the environment than another trading partner?
5. ...its goods are the most competitively priced on the global market?
 

Much more likely .....	1
Somewhat more likely .....	2
Somewhat less likely .....	3
Much less likely .....	4
I don't know/I have no opinion .....	77

[TRACKING] Do you agree or disagree with the following statements? [RANDOMIZE]

6. Canada is America's most secure and reliable trading partner
7. [NEW] Trade between the U.S. and Canada provides economic benefits to the U.S.
8. The U.S. periodically needs to impose tariffs on imports from Canada to protect U.S. national security
 

Strongly agree .....	1
Somewhat agree .....	2
Somewhat disagree .....	3
Strongly disagree .....	4
I don't know/I have no opinion .....	77
9. [NEW] On a scale from 0 to 10, where 0 is a very negative impact and 10 is a very positive impact, what level of impact do you think the current U.S.-Canada trade relationship has on the U.S. economy?
 

0 (very negative impact) .....	0
1 .....	1
2 .....	2
3 .....	3
4 .....	4
5 .....	5
6 .....	6
7 .....	7
8 .....	8
9 .....	9
10 (very positive impact) .....	10
I don't know/I have no opinion .....	77
10. [NEW] On a scale from 0 to 10, where 0 is not concerned at all and 10 is a very concerned, how concerned or not concerned are you about the current U.S.-Canada trade relationship?
 

0 (not concerned at all) .....	0
1 .....	1
2 .....	2
3 .....	3
4 .....	4
5 .....	5
6 .....	6
7 .....	7
8 .....	8
9 .....	9
10 (very concerned) .....	10
I don't know/I have no opinion .....	77
11. [NEW] What specific concerns do you have about the current U.S.-Canada trade relationship, if any? [OPEN]



12. [NEW] What are the benefits to the U.S. in terms of the current U.S.-Canada trade relationship, if any? [OPEN]
13. [NEW] What are the downsides to the U.S. in terms of the current U.S.-Canada trade relationship, if any? [OPEN]

### Tariffs

14. [NEW] On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose the U.S. imposing tariffs on Canadian goods?

0 (strongly oppose).....0  
 1.....1  
 2.....2  
 3.....3  
 4.....4  
 5.....5  
 6.....6  
 7.....7  
 8.....8  
 9.....9  
 10 (strongly support) .....10  
 I don't know/I have no opinion .....77

[NEW] On a scale from 0 to 10, where 0 is completely disagree and 10 is completely agree, to what extent do you agree or disagree with the following statements? [RANDOMIZE] [DRIVER ANALYSIS]

15. The U.S. subsidizes Canada  
 16. Canada "owes" the U.S.  
 17. Canada should become part of the U.S.  
 18. Free trade between the U.S. and Canada has cost the U.S. jobs  
 19. Free trade between the U.S. and Canada has lowered the cost of goods for American consumers  
 20. I am worse off today compared to 4 years ago  
 21. I will have to pay more for things like groceries and gas if tariffs are imposed on Canada by the U.S.  
 22. I trust mainstream media to provide me with accurate information about U.S.-Canada relations  
 23. I trust social media to provide me with accurate information about U.S.-Canada relations  
 24. I trust the federal government to provide me with accurate information about U.S.-Canada relations

0 (completely disagree) .....0  
 1.....1  
 2.....2  
 3.....3  
 4.....4  
 5.....5  
 6.....6  
 7.....7  
 8.....8  
 9.....9  
 10 (completely agree).....10  
 I don't know/I have no opinion .....77

[TRACKING – TWEAKED] The United States is imposing tariffs on imports from Canada. Would you support or oppose continuing to impose these tariffs if...[RANDOMIZE]





25. ... they contribute to higher housing costs for American homebuyers?  
 26. ... if they increase taxes for American businesses?  
 27. ... if they increase taxes for American consumers?  
 28. ...they result in job losses in your local community?  
 29. ...they support jobs in your local community?  
     Strongly support .....1  
     Somewhat support .....2  
     Somewhat oppose.....3  
     Strongly oppose .....4  
     I don't know/I have no opinion .....77

### Buy American Policies [U.S. ONLY]

At the state level, many U.S. states provide preferential treatment to U.S. companies for government contracts. These are often termed as Buy American policies.

30. [NEW] On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, to what extent do you support or oppose Buy American policies for government contracts knowing they could lead to potential delays and increased costs to the government?  
     0 (strongly oppose).....0  
     1.....1  
     2.....2  
     3.....3  
     4.....4  
     5.....5  
     6.....6  
     7.....7  
     8.....8  
     9.....9  
     10 (strongly support) .....10  
     I don't know/I have no opinion .....77
31. [NEW] Thinking of Buy American policies for state governments, which of these two statements is closer to your view [ROTATE]  
     State government contracts should only be open to American companies from that state to protect local businesses ..... 1  
     State government contracts should be open to American companies from outside that state to ensure the state receives the best value for money ..... 2  
     Unsure ..... 77

### USMCA

As you may know, the United States–Mexico–Canada Agreement (USMCA) between the United States of America, Mexico, and Canada is a free trade agreement among the three countries. The agreement entered into force on July 1, 2020 and replaced the previous North America Free Trade Agreement (NAFTA). It is set to be reviewed in 2026.

[NEW] Do you agree or disagree with the following statements? [RANDOMIZE]



32. Free trade between the U.S., Canada and Mexico provides benefits to U.S. businesses
33. Free trade between the U.S., Canada and Mexico provides benefits to U.S. citizens.
34. Canada and the U.S. should further increase trade with each other and link their economies through trade agreements
- Strongly agree.....1
- Somewhat agree.....2
- Somewhat disagree .....3
- Strongly disagree .....4
- I don't know/I have no opinion .....77
35. [NEW] On a scale from 0 to 10, where 0 is not important at all and 10 is very important, how important or unimportant do you think it is for the U.S. Government to continue its free trade agreement with Canada and Mexico in 2026?
- 0 (not important at all) .....0
- 1 .....1
- 2 .....2
- 3 .....3
- 4 .....4
- 5 .....5
- 6 .....6
- 7 .....7
- 8 .....8
- 9 .....9
- 10 (very important) .....10
- I don't know/I have no opinion .....77
- [TRACKING] To what extent do you agree or disagree with the following statements. [ROTATE]
36. Canada is the U.S.' best friend and ally.
37. Canada is an essential partner for the U.S.
- Strongly agree.....1
- Somewhat agree.....2
- Somewhat disagree .....3
- Strongly disagree .....4
- I don't know/I have no opinion .....77

### Border Security

38. [NEW] Which of the following issues are you most concerned about in relation to the U.S.-Canada border?
- [ROTATE][SELECT ONE]
- Illegal drugs..... 1
- Human trafficking and smuggling..... 2
- Organized crime ..... 3
- Firearms ..... 4
- None of the above/none are a concern ..... 5
- Other (Specify)..... 20
- I don't know/I have no opinion ..... 77



[TRACKING] Thinking about the northern border between the United States and Canada, to what extent do you agree or disagree that the way the border is currently managed...[RANDOMIZE]

39. ... [TWEAKED] The border poses a threat to national security in the U.S.?  
 40. ... [NEW] The border poses a threat to national security in Canada?  
 41. ... The border contributes to the U.S. economy?  
 42. ... The border encourages illegal immigration into the U.S.?  
 43. ... [NEW] The border enables smooth trade between the countries?  
 44. ... [NEW] The border enables smooth travel between the countries?  
 45. ... [NEW] The border contributes to reducing crime in both countries?  
 46. ...[NEW] The border contributes to fentanyl trafficking in the U.S.?  
     Strongly agree.....1  
     Somewhat agree.....2  
     Somewhat disagree .....3  
     Strongly disagree .....4  
     I don't know/I have no opinion .....77

[NEW] To what extent do you agree or disagree with the following statements? [RANDOMIZE]

47. Canada is doing a good job of securing the U.S.-Canada border  
 48. The U.S.-Canada border is safer than the U.S.-Mexico border  
 49. Canada is a major source of fentanyl to the U.S.  
 50. The U.S. is a major source of fentanyl into Canada  
     Strongly agree.....1  
     Somewhat agree.....2  
     Somewhat disagree .....3  
     Strongly disagree .....4  
     I don't know/I have no opinion .....77

[NEW] In December 2024, the Canadian government announced a plan to strengthen border security. This plan includes an investment of \$1.3 billion and aims to increase border security, disrupt the fentanyl trade, provide new tools to law enforcement, among others. The measures in the plan include enhanced surveillance technologies, increased border patrols and a joint strike force between Canada and the U.S. and additional intelligence gathering and analysis.

51. [NEW] Prior to today, had you heard or not heard about Canada's new border security plan?  
     Heard .....1  
     Not heard.....2
52. [NEW] To what extent do you think the measures proposed in Canada's Border Plan will deter people from crossing into the U.S. irregularly or undetected?  
     A great deal .....1  
     Somewhat.....2  
     Not very much .....3  
     Not at all .....4  
     Unsure .....77
53. [NEW] To what extent do you support or oppose the overall goals of Canada's Border Plan?  
     Support.....1  
     Somewhat support .....2  
     Somewhat oppose.....3



Oppose .....4  
Unsure .....77

[NEW] To what extent do you support or oppose Canada increasing the use of the following types of technology to manage the U.S.-Canada border? [RANDOMIZE]

54. App or web-based forms (including customs declarations, submission of traveler information)  
55. Facial recognition technology/biometrics  
56. Electronic gates  
57. Drones

Support .....1  
Somewhat support .....2  
Somewhat oppose .....3  
Oppose .....4  
Unsure .....77

### Cross-Border Supply Chains [U.S. ONLY]

58. [NEW] How important or unimportant do you think the Canadian economy is to the U.S. economy?

Important .....1  
Somewhat important .....2  
Somewhat unimportant .....3  
Unimportant .....4  
Unsure .....77

59. [NEW] How important or unimportant do you think the Mexican economy is to the U.S. economy?

Important .....1  
Somewhat important .....2  
Somewhat unimportant .....3  
Unimportant .....4  
Unsure .....77

### Collaboration

60. [NEW] What type of impact do you think the current U.S. government will have on U.S.-Canada relations?

Positive .....1  
Somewhat positive .....2  
Somewhat negative .....3  
Negative .....4  
No impact .....5  
Unsure .....77

61. [NEW] What source(s) do you go to for news or information about U.S.-Canada relations? (Please select all that apply) [RANDOMIZE]

Social media ..... 1  
TV ..... 2  
Newspaper ..... 3  
Radio ..... 4  
Word of mouth ..... 5  
Other (Please specify \_\_\_\_ ) .....6



None..... 7

62. [NEW] Please rank the following areas that you think the U.S. and Canada should prioritize in their relationship, where 1 is the biggest priority, 2 is the second biggest priority and so on [RANDOMIZE]

Trade and economic cooperation.....  
Border security .....  
Environmental and climate policies .....  
Energy cooperation .....  
Military and defense partnerships .....  
Other (please specify).....  
Unsure .....  
None of the above.....

63. [TRACKING] Which of the following best describes the relationship between the United States and Canada?

They are ...[RANDOMIZE][select one]

...friends.....1  
...good neighbors .....2  
...allies .....3  
...partners .....4  
...each other's customers .....5  
...competitors.....6  
...equals on the world stage.....7  
None of the above .....8  
Unsure .....77

#### Energy [U.S. ONLY]

64. [NEW] On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, please rate to what extent you support or oppose a tariff on Canadian energy, even if it means an increase in costs for the U.S.?

0 (strongly oppose).....0  
1.....1  
2.....2  
3.....3  
4.....4  
5.....5  
6.....6  
7.....7  
8.....8  
9.....9  
10 (strongly support) .....10  
I don't know/I have no opinion .....77

65. [NEW] On a scale from 0 to 10, where 0 is strongly oppose and 10 is strongly support, please rate to what extent you support or oppose a tariff on Canadian energy, even if it means increasing imports to the U.S. from other countries like Russia or Venezuela?

0 (strongly oppose).....0  
1.....1  
2.....2  
3.....3  
4.....4



5.....	5
6.....	6
7.....	7
8.....	8
9.....	9
10 (strongly support) .....	10
I don't know/I have no opinion .....	77

## Travel

66. [NEW] How often do you cross the U.S. border into Canada by land?
- |                    |                  |
|--------------------|------------------|
| Regularly .....    | 1 [GO TO Q67]    |
| Occasionally ..... | 2 [GO TO Q67]    |
| Never .....        | 3 [SKIP TO Q68]  |
| Unsure .....       | 77 [SKIP TO Q68] |
67. [NEW][IF CROSSES BORDER REGULARLY OR OCCASIONALLY] In your personal experience, how easy or difficult has it been to cross the U.S. border into Canada?
- |                            |    |
|----------------------------|----|
| Easy.....                  | 1  |
| Somewhat easy.....         | 2  |
| Somewhat difficult .....   | 3  |
| Difficult .....            | 4  |
| Unsure/do not recall ..... | 77 |
68. [NEW] If you had one piece of advice to elected officials on U.S.-Canada relations, what would it be? [OPEN-ENDED]

Our last few questions will help us group your responses.

69. [U.S. VERSION] Which of the following best describes yourself?
- An American citizen born in the U.S., and all my parents and grandparents were born in the U.S. ....1
  - An immigrant (born in another country) .....2
  - A first-generation American citizen born in the U.S. (at least one parent born in another country) .....3
  - A second-generation American citizen born in the U.S. (at least one grandparent born in another country) .....5
  - Prefer not to say .....77
70. [U.S. VERSION] With which of the following do you best identify yourself?
- White .....1
  - South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.) .....2
  - Chinese .....3
  - Black .....4
  - Filipino .....5
  - Latin American .....6
  - Arab .....7
  - Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai, etc.) .....8
  - West Asian (e.g., Iranian, Afghan, etc.) .....9
  - Korean .....10
  - Japanese .....11
  - Indigenous .....12
  - Other — specify .....20
  - Prefer not to say .....77
71. [ASK U.S. ONLY] Are you currently registered to vote at your current address, registered at a different address or not currently registered?
- Registered at current address .....1
  - Registered at a different address .....2
  - Not currently registered .....3
  - I am not eligible to vote .....4
  - Not Sure .....77

Thank you for taking the time to answer this survey. The survey was done on behalf of the Government of Canada. Your answers will remain anonymous and the information you provide will be administered according to the requirements of the Privacy Act, the Access to Information Act, and any other pertinent legislation.

**Thank you very much for your time.**

## U.S. Survey (Spanish)

### INTRODUCTION

AmeriSpeak ha sido contratada para administrar esta encuesta sobre un tema de opinión pública. La encuesta dura unos 15 minutos y su participación es voluntaria y confidencial. Para proteger aún más la privacidad de los participantes en este estudio, NORC ha obtenido un Certificado de Confidencialidad. Esta información está a disposición de los panelistas de AmeriSpeak en: <https://www.amerispeak.org/privacy>.

Este proyecto de investigación está registrado en el Servicio de Verificación de Investigación de CRIC, que te permite verificar su legitimidad y compartir tu opinión. Si tienes comentarios sobre esta investigación, puedes compartirlos ingresando a <https://canadianresearchinsightscouncil.ca/rvs> y usando el código RVS: XYZ.

A. Tiene 18 años o más?

- ☐ Sí ☐ No (*Terminate – not qualified*)

B. ¿Usted o alguien de su familia inmediata trabaja en alguna de las siguientes ocupaciones?

- ☐ Empresa de investigación de mercado (*Terminate – not qualified*)  
☐ Televisión, radio o medios de comunicación (*Terminate – not qualified*)  
☐ Empresa de publicidad (*Terminate – not qualified*)  
☐ Partido político (*Terminate – not qualified*)

1. ¿En qué provincia, territorio o estado vive? [INSERT LIST]

2. [TRACKING – TWEAKED WITH 3 NEW OPTIONS] ¿Cuál cree que es un asunto prioritario para usted hoy? [RANDOMIZE][SELECT A MAX OF 3]

- |  |          |
|--|----------|
| La asistencia médica .....   | 1        |
| Falta de vivienda asequible .....  | 2        |
| Violencia armada .....   | 3        |
| Racismo .....  | 4        |
| Crimen .....   | 5        |
| Escasez de trabajadores .....  | 6        |
| Cambio climático .....   | 8        |
| Déficit presupuestario .....   | 9        |
| Terrorismo .....   | 10       |
| Desinformación (información falsa) en las noticias.....                    | 11       |
| Desinformación (información incorrecta) en las noticias.....               | 12       |
| Personas sin hogar.....  | 13       |
| Falta de buenos empleos.....   | 14       |
| Aumento del comercio entre EE. UU y Canadá. ....                           | 15       |
| Fortalecimiento de la seguridad en la frontera entre EE. UU y Canadá. .... | 16 [NEW] |
| Inmigración.....   | 17 [NEW] |
| Fentanilo.....   | 18 [NEW] |
| Otro: especifique .....  | 20       |
| No estoy seguro/a .....  | 77       |



**General Trade**

[TRACKING - TWEAKED]

¿Qué tan probable sería que usted apoye el que Estados Unidos tuviera una relación comercial más estrecha con otro país si...[RANDOMIZE]

3. ...sus trabajadores estuvieran afiliados a los mismos sindicatos que los estadounidenses?
4. ...sus productos vinieran de un vecino cercano de EE. UU. en lugar de venir de lejos o del extranjero?
5. ...sus productos tuvieran menos impacto negativo en el medio ambiente que los de otros socios comerciales?
6. ...sus productos tuvieran los precios más competitivos del mercado mundial?
  - Mucho más probable .....1
  - Algo más probable .....2
  - Algo menos probable .....3
  - Mucho menos probable .....4
  - No lo sé/No tengo opinión .....77

[TRACKING] ¿Está usted de acuerdo o en desacuerdo con las siguientes afirmaciones? [RANDOMIZE]

7. Canadá es el socio comercial más seguro y confiable de Estados Unidos
8. [NEW] El comercio entre los EE. UU. y Canadá proporciona beneficios económicos para los EE. UU.
9. EE. UU. necesita imponer periódicamente aranceles a las importaciones procedentes de Canadá para proteger la seguridad nacional de EE. UU.
  - Estoy totalmente de acuerdo .....1
  - Estoy algo de acuerdo .....2
  - Estoy algo en desacuerdo.....3
  - Estoy totalmente en desacuerdo ....4
  - No lo sé/No tengo opinión .....77
10. [NEW] En una escala del 0 al 10, donde 0 es un impacto muy negativo y 10 es un impacto muy positivo, ¿qué nivel de impacto cree usted que tiene la actual relación comercial entre EE. UU. y Canadá en la economía de EE. UU.?
  - 0 (impacto muy negativo).....0
  - 1.....1
  - 2.....2
  - 3.....3
  - 4.....4
  - 5.....5
  - 6.....6
  - 7.....7
  - 8.....8
  - 9.....9
  - 10 (impacto muy positivo).....10
  - No lo sé/No tengo opinión .....77
11. [NEW] En una escala del 0 al 10, donde 0 significa "nada preocupado/a" y 10 significa "muy preocupado/a", ¿qué tan preocupado/a o no preocupado/a está usted por la actual relación comercial entre EE. UU. y Canadá?
  - 0 (nada preocupado/a).....0
  - 1.....1
  - 2.....2
  - 3.....3
  - 4.....4
  - 5.....5
  - 6.....6
  - 7.....7

- 8.....8  
 9.....9  
 10 (muy preocupado/a).....10  
 No lo sé/No tengo opinión .....77

12. [NEW] ¿Qué preocupaciones específicas tiene usted sobre la actual relación comercial entre EE. UU. y Canadá, si es que tiene alguna? [OPEN]
13. [NEW] ¿Cuáles son los beneficios para EE. UU. en términos de la actual relación comercial entre EE. UU. y Canadá, si es que hay alguno? [OPEN]
14. [NEW] ¿Cuáles son las desventajas para EE. UU. en términos de la actual relación comercial entre EE. UU. y Canadá, si es que hay alguna? [OPEN]

### Tariffs

15. [NEW] En una escala del 0 al 10, donde 0 significa "me opongo totalmente" y 10 significa "apoyo totalmente", ¿en qué medida apoya o se opone a que EE. UU. imponga aranceles a los productos canadienses?

- 0 (me opongo totalmente) .....0  
 1.....1  
 2.....2  
 3.....3  
 4.....4  
 5.....5  
 6.....6  
 7.....7  
 8.....8  
 9.....9  
 10 (apoyo totalmente).....10  
 No sé/No tengo opinión .....77

[NEW] En una escala del 0 al 10, donde 0 significa "totalmente en desacuerdo" y 10 significa "totalmente de acuerdo", ¿en qué medida está usted de acuerdo o en desacuerdo con las siguientes afirmaciones? [RANDOMIZE] [DRIVER ANALYSIS]

16. EE. UU. subsidia a Canadá
17. Canadá le "debe" a EE. UU.
18. Canadá debería convertirse en parte de EE. UU.
19. El libre comercio entre EE. UU. y Canadá ha costado empleos a EE. UU.
20. El libre comercio entre EE. UU. y Canadá ha reducido el costo de los productos para los consumidores estadounidenses
21. Estoy peor hoy en comparación con hace 4 años
22. Tendré que pagar más por cosas como alimentos y gasolina si EE. UU. impone aranceles a Canadá
23. Confío en los medios de comunicación tradicionales para proporcionarme información precisa sobre las relaciones entre EE. UU y Canadá.
24. Confío en las redes sociales para proporcionarme información precisa sobre las relaciones entre EE. UU y Canadá.
25. Confío en el gobierno federal para proporcionarme información precisa sobre las relaciones entre EE. UU y Canadá.
- 0 (totalmente en desacuerdo).....0  
 1.....1  
 2.....2  
 3.....3  
 4.....4  
 5.....5  
 6.....6  
 7.....7  
 8.....8

- 9.....9  
 10 (totalmente de acuerdo) .....10  
 No lo sé/No tengo opinión .....77

[TRACKING – TWEAKED] Estados Unidos está imponiendo aranceles a las importaciones procedentes de Canadá. ¿Apoyaría o se opondría a continuar imponiendo estos aranceles si...

[RANDOMIZE]

26. ... contribuyen a aumentar los costos de vivienda para los compradores de viviendas estadounidenses?  
 27. ... aumentan los impuestos para las empresas estadounidenses?  
 28. ... aumentan los impuestos para los consumidores estadounidenses?  
 29. ...resultan en la pérdida de empleos en su comunidad local?  
 30. ...apoyan los empleos en su comunidad local?  
     Apoyaría totalmente .....1  
     Apoyaría algo.....2  
     Me opondría algo .....3  
     Me opondría totalmente.....4  
     No lo sé/No tengo opinión .....77

### Buy American Policies [U.S. ONLY]

A nivel estatal, muchos estados de EE. UU. otorgan un trato preferencial a las empresas estadounidenses para los contratos gubernamentales. Estos a menudo se denominan políticas "Compra Estadounidense".

31. [NEW] En una escala del 0 al 10, donde 0 significa "me opondría totalmente" y 10 significa "apoyaría totalmente", ¿en qué medida apoya o se opone usted a las políticas Compra Estadounidense para los contratos gubernamentales, sabiendo que podrían generar posibles retrasos y mayores costos para el gobierno?  
     0 (me opondría totalmente).....0  
     1.....1  
     2.....2  
     3.....3  
     4.....4  
     5.....5  
     6.....6  
     7.....7  
     8.....8  
     9.....9  
     10 (apoyaría totalmente).....10  
     No lo sé / No tengo opinión .....77
32. [NEW] Pensando en las políticas Compra Estadounidense para los gobiernos estatales, ¿cuál de estas dos afirmaciones se acerca más a su opinión? [ROTATE]  
     Los contratos gubernamentales estatales deberían estar abiertos solo a empresas estadounidenses de ese estado para proteger a los negocios locales .....1  
     Los contratos gubernamentales estatales deberían estar abiertos a empresas estadounidenses de fuera de ese estado para asegurar que el estado reciba el mejor valor por su dinero.....2  
     No estoy seguro/a .....77

### USMCA

Como es posible que sepa, el Tratado entre México, Estados Unidos y Canadá (T-MEC) entre los Estados Unidos de América, México y Canadá es un acuerdo de libre comercio entre los tres países. El acuerdo entró en vigor el 1 de julio de 2020 y reemplazó al anterior Tratado de Libre Comercio de América del Norte (TLCAN). Se revisará en 2026.

[NEW] ¿Está usted de acuerdo o en desacuerdo con las siguientes afirmaciones? [RANDOMIZE]

33. El libre comercio entre EE. UU., Canadá y México proporciona beneficios para las empresas de EE. UU.
34. El libre comercio entre EE. UU., Canadá y México proporciona beneficios para los ciudadanos de EE. UU.
35. Canadá y EE. UU. deberían aumentar aún más el comercio entre sí y vincular sus economías a través de acuerdos comerciales
- Estoy totalmente de acuerdo .....1
- Estoy algo de acuerdo .....2
- Estoy algo en desacuerdo.....3
- Estoy totalmente en desacuerdo ....4
- No lo sé/No tengo opinión .....77
36. [NEW] En una escala del 0 al 10, donde 0 significa "no es importante en absoluto" y 10 significa "muy importante", ¿qué tan importante o no importante cree que es para el gobierno de EE. UU. continuar su acuerdo de libre comercio con Canadá y México en 2026?
- 0 (no es importante en absoluto) ....0
- 1 .....1
- 2 .....2
- 3 .....3
- 4 .....4
- 5 .....5
- 6 .....6
- 7 .....7
- 8 .....8
- 9 .....9
- 10 (muy importante) .....10
- No lo sé/No tengo opinión .....77

[TRACKING] ¿En qué medida está usted de acuerdo o en desacuerdo con las siguientes afirmaciones? [ROTATE]

37. Canadá es el mejor amigo y aliado de Estados Unidos
38. Canadá es un socio esencial para Estados Unidos
- Estoy totalmente de acuerdo .....1
- Estoy algo de acuerdo .....2
- Estoy algo en desacuerdo.....3
- Estoy totalmente en desacuerdo ....4
- No lo sé/No tengo opinión .....77

### Border Security

39. [NEW] ¿Cuál de los siguientes problemas le preocupa más en relación con la frontera entre EE. UU y Canadá.? [ROTATE][SELECT ONE]
- Drogas ilegales..... 1
- Tráfico de personas y contrabando ..... 2
- Crimen organizado ..... 3
- Armas de fuego ..... 4
- Ninguno de los anteriores/ninguno es una preocupación ..... 5
- Otro (Especifique)..... 20
- No lo sé/No tengo opinión ..... 77

[TRACKING] Si considera la frontera norte entre Estados Unidos y Canadá, ¿en qué medida está usted de acuerdo o en desacuerdo en que la forma en la cual la frontera está actualmente administrada...[RANDOMIZE]

40. ... [TWEAKED] La frontera representa una amenaza para la seguridad nacional de EE. UU.?
41. ... [NEW] La frontera representa una amenaza para la seguridad nacional de Canadá?
42. ... La frontera contribuye a la economía de EE. UU.?
43. ... La frontera fomenta la inmigración ilegal en Estados Unidos?
44. ... [NEW] La frontera facilita el comercio fluido entre los países?
45. ... [NEW] La frontera facilita los viajes fluidos entre los países?
46. ... [NEW] La frontera contribuye a reducir el crimen en ambos países?
47. ...[NEW] La frontera contribuye al tráfico de fentanilo en EE.UU.?  
 Totalmente de acuerdo.....1  
 Algo de acuerdo .....2  
 Algo en desacuerdo.....3  
 Totalmente en desacuerdo .....4  
 No lo sé/No tengo opinión .....77

[NEW] ¿En qué medida está de acuerdo o en desacuerdo con las siguientes afirmaciones? [RANDOMIZE]

48. Canada está haciendo un buen trabajo asegurando la frontera entre EE. UU. y Canadá
49. La frontera entre EE. UU. y Canadá es más segura que la frontera entre EE. UU. y México
50. Canadá es una fuente importante de fentanilo para EE. UU.
51. EE. UU. es una fuente importante de fentanilo para Canadá  
 Estoy totalmente de acuerdo .....1  
 Estoy algo de acuerdo .....2  
 Estoy algo en desacuerdo.....  
 Estoy totalmente en desacuerdo ....4  
 No lo sé/No tengo opinión .....77

[NEW] En diciembre de 2024, el gobierno canadiense anunció un plan para fortalecer la seguridad fronteriza. Este plan incluye una inversión de \$1.3 mil millones y tiene como objetivo aumentar la seguridad fronteriza, interrumpir el comercio de fentanilo, proporcionar nuevas herramientas a las fuerzas del orden, entre otros. Las medidas del plan incluyen tecnologías avanzadas de vigilancia, aumento de patrullas fronterizas, una fuerza de tarea conjunta entre Canadá y EE. UU., y recopilación y análisis adicional de inteligencia.

52. [NEW] Antes de hoy, ¿había oído o no oído hablar del nuevo plan de seguridad fronteriza de Canadá?  
 He oído .....1  
 No he oído .....2
53. [NEW] ¿En qué medida cree usted que las medidas propuestas en el Plan Fronterizo de Canadá disuadirán a las personas de cruzar irregularmente o sin ser detectadas hacia EE. UU.?  
 En gran medida .....1  
 Algo .....2  
 No mucho .....3  
 Para nada .....4  
 No lo sé .....77

54. [NEW] ¿En qué medida apoya o se opone a los objetivos generales del Plan Fronterizo de Canadá?

- Apoyaría .....1
- Apoyaría algo .....2
- Me opondría algo .....3
- Me opondría .....4
- No estoy seguro/a .....77

[NEW] ¿En qué medida apoya o se opone usted a que Canadá aumente el uso de los siguientes tipos de tecnología para gestionar la frontera entre EE. UU. y Canadá? [RANDOMIZE]

55. Formularios basados en aplicaciones o web (incluyendo declaraciones de aduanas, envío de información del viajero)

56. Tecnología de reconocimiento facial / biométricos

57. Puertas electrónicas

58. Drones

- Apoyaría .....1
- Apoyaría algo.....2
- Me opondría algo .....3
- Me opondría .....4
- No estoy seguro/a .....77

### Cross-Border Supply Chains [U.S. ONLY]

59. [NEW] ¿Qué tan importante o no importante cree que es la economía canadiense para la economía de EE. UU.?

- Importante .....1
- Algo importante .....2
- Algo no importante .....3
- No importante .....4
- No estoy seguro/a .....77

60. [NEW] ¿Qué tan importante o no importante cree que es la economía mexicana para la economía de EE. UU.?

- Importante .....1
- Algo importante .....2
- Algo no importante .....3
- No importante .....4
- No estoy seguro/a .....77

### Collaboration

61. [NEW] ¿Qué tipo de impacto cree que tendrá el gobierno actual de EE. UU. en las relaciones entre EE. UU. y Canadá?

- Positivo .....1
- Algo positivo .....2
- Algo negativo .....3
- Negativo .....4
- Sin impacto .....5
- No estoy seguro/a .....77

62. [NEW] ¿Qué fuente(s) utiliza para obtener noticias o información sobre las relaciones entre EE. UU. y Canadá?  
(Seleccione todas las que apliquen) [RANDOMIZE]
- |                         |   |
|-------------------------|---|
| Redes sociales .....    | 1 |
| Televisión .....        | 2 |
| Periódico .....         | 3 |
| Radio .....             | 4 |
| De boca a boca .....    | 5 |
| Otro (especifique ____) | 6 |
| Ninguna.....            | 7 |
63. [NEW] Clasifique las siguientes áreas que cree que EE. UU. y Canadá deberían priorizar en su relación, donde 1 es la mayor prioridad, 2 es la segunda mayor prioridad, y así sucesivamente [RANDOMIZE]
- |   |       |
|---|-------|
| Cooperación comercial y económica.....        | _____ |
| Seguridad fronteriza .....                    | _____ |
| Políticas medioambientales y climáticas ..... | _____ |
| Cooperación energética .....                  | _____ |
| Alianzas militares y de defensa .....         | _____ |
| Otra (especifique).....                       | _____ |
| No estoy seguro/a .....                       | _____ |
| Ninguna de las anteriores.....                | _____ |
64. [TRACKING] ¿Cuál de las siguientes opciones describe mejor la relación entre los Estados Unidos y Canadá? Son...  
[RANDOMIZE][seleccione una]
- |  |    |
|--|----|
| ...amigos.....                         | 1  |
| ...buenos vecinos .....                | 2  |
| ...aliados.....                        | 3  |
| ...socios .....                        | 4  |
| ...clientes el uno del otro .....      | 5  |
| ...competidores.....                   | 6  |
| ...iguales en el escenario mundial.... | 7  |
| Ninguna de las anteriores.....         | 8  |
| No estoy seguro/a .....                | 77 |

### Energy [U.S. ONLY]

65. [NEW] En una escala del 0 al 10, donde 0 significa "me opondría totalmente" y 10 significa "apoyaría totalmente", ¿en qué medida apoya o se opone a un arancel sobre la energía canadiense, incluso si esto significa un aumento en los costos para EE. UU.?
- |                                 |    |
|---------------------------------|----|
| 0 (me opondría totalmente)..... | 0  |
| 1.....                          | 1  |
| 2.....                          | 2  |
| 3.....                          | 3  |
| 4.....                          | 4  |
| 5.....                          | 5  |
| 6.....                          | 6  |
| 7.....                          | 7  |
| 8.....                          | 8  |
| 9.....                          | 9  |
| 10 (apoyaría totalmente).....   | 10 |
| No lo sé/No tengo opinión ..... | 77 |

66. [NEW] En una escala del 0 al 10, donde 0 significa "me opondría totalmente" y 10 significa "apoyaría totalmente", ¿en qué medida apoya o se opone a un arancel sobre la energía canadiense, incluso si esto significa aumentar las importaciones a EE. UU. desde otros países como Rusia o Venezuela?

0 (me opondría totalmente).....0  
 1.....1  
 2.....2  
 3.....3  
 4.....4  
 5.....5  
 6.....6  
 7.....7  
 8.....8  
 9.....9  
 10 (apoyaría totalmente).....10  
 No lo sé/No tengo opinión .....77

### Travel

67. [NEW] ¿Con qué frecuencia cruza la frontera de EE. UU. hacia Canadá por tierra?

Regularmente .....1 [GO TO Q67]  
 Ocasionalmente.....2 [GO TO Q67]  
 Nunca .....3 [SKIP TO Q68]  
 No estoy seguro/a .....77 [SKIP TO Q68]

68. [NEW][IF CROSSES BORDER REGULARLY OR OCCASIONALLY] Según su experiencia personal, ¿qué tan fácil o difícil ha sido cruzar la frontera de EE. UU. hacia Canadá?

Fácil.....1  
 Algo fácil .....2  
 Algo difícil .....3  
 Difícil .....4  
 No lo sé/No recuerdo .....77

69. [NEW] Si tuviera un consejo para los funcionarios electos sobre las relaciones entre EE. UU. y Canadá, ¿cuál sería?  
 [OPEN-ENDED]

Nuestras últimas preguntas nos ayudarán a agrupar sus respuestas.

70. [U.S. VERSION] ¿Cuál de las siguientes opciones describe mejor su situación?

Un/a ciudadano/a estadounidense nacido/a en EE. UU., y todos mis padres y abuelos nacieron en EE. UU. .... 1  
 Un/a inmigrante (nacido/a en otro país)..... 2  
 Un/a ciudadano/a estadounidense de primera generación nacido/a en EE. UU. (al menos un padre nacido en otro país)3  
 Un/a ciudadano/a estadounidense de segunda generación nacido/a en EE. UU. (al menos un abuelo nacido en otro país) ..... 5  
 Prefiero no decirlo..... 77



71. [U.S. VERSION] ¿Con cuál de las siguientes opciones se identifica mejor?

Blanco/a.....	1
Surasiático/a (por ejemplo, indio/a, pakistaní, ceilanés/a, etc.)	2
Chino/a .....	3
Negro/a .....	4
Filipino/a.....	5
Latinoamericano/a .....	6
Árabe .....	7
Sudeste Asiático/a (por ejemplo, vietnamita, camboyano/a, laosiano/a, tailandés/a, etc.)	8
Asia Occidental (por ejemplo, iraní, afgano/a, etc.)	9
Coreano/a .....	10
Japonés/a .....	11
Indígena .....	12
Otro/a — especifique .....	20
Prefiero no decir.....	77

72. [ASK U.S. ONLY] ¿Está registrado/a usted para votar en su domicilio actual, está registrado/a en otro domicilio o no está registrado/a?

Registrado/a en mi domicilio actual.....	1
Registrado/a en otra dirección.....	2
No estoy registrado/a.....	3
No puedo votar.....	4
No estoy seguro/a.....	77

Gracias por tomarse el tiempo de responder esta encuesta. La encuesta se ha realizado en nombre del Gobierno de Canadá. Sus respuestas permanecerán anónimas y la información que proporcione se administrará de acuerdo con los requisitos de la Ley de Privacidad, la Ley de Acceso a la Información y cualquier otra legislación pertinente.

**Muchas gracias por su tiempo.**