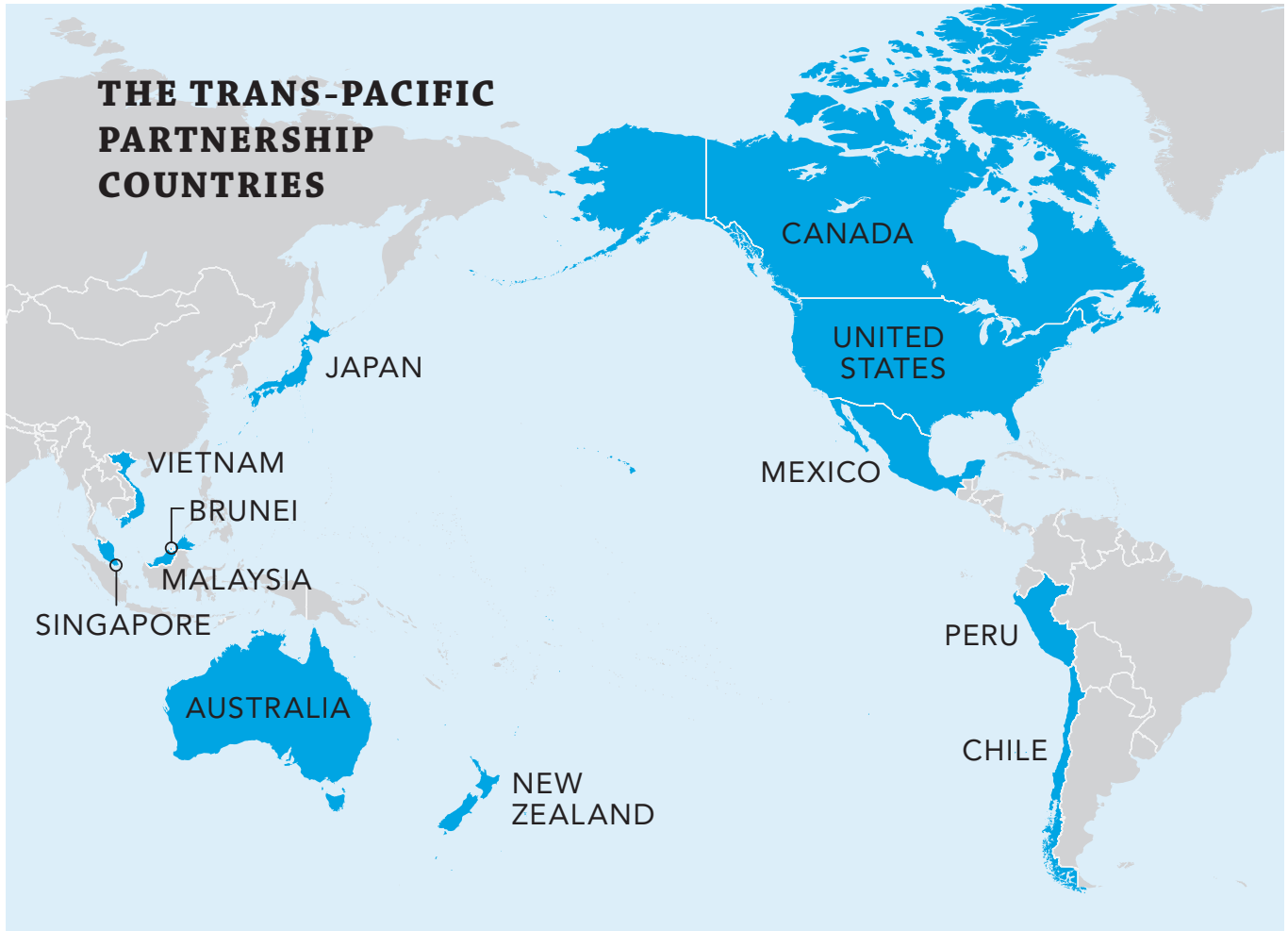


OCTOBER 2015

2015 NATIONAL OPINION POLL

CANADIAN VIEWS ON THE TRANS-PACIFIC PARTNERSHIP

THE TRANS-PACIFIC PARTNERSHIP COUNTRIES



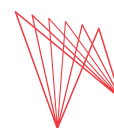


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EXECUTIVE SUMMARY

The Trans-Pacific Partnership (TPP) will have a significant impact on the Canadian economy, and may catalyze a shift in our country's global economic engagement with Asia.

Canadians will see a period of increased scrutiny of the TPP as Parliament debates the benefits and drawbacks of approving and implementing the final agreement. It is into this discussion that the Asia Pacific Foundation of Canada releases its *2015 National Opinion Poll: Canadian Views on the Trans-Pacific Partnership*.

Our findings reveal that Canadians are increasingly polarized toward the TPP. The Canadian public is divided on the agreement, with 41% of poll respondents supporting the TPP, and 38% opposing the deal. Similarly, 33% of Canadians think the TPP will be good for the economy, while 31% think it will be harmful. What is striking, however, is the higher level of expressed opposition to the TPP since APF Canada's polling on this topic three years ago.

The soft support for the TPP is not because Canadians are against free trade agreements (66% support signing free trade agreements in general). And it is not because they are against free trade agreements with countries in the TPP zone. In fact, there is strong support for agreements with nine of the 11 TPP countries, with support particularly high for some of the larger signatories, such as Australia (77%), the U.S. (77%) and Japan (70%). Clearly, there is a gap between Canadians' strong support for trade and free trade agreements generally, and their soft support for the TPP specifically.

One potential explanation for soft support for the agreement is that Canadians have limited knowledge of the TPP, its participants and its particulars. For example, 38% of respondents correctly identified intellectual property rights as a component of the TPP, while only 20% of respondents were aware that China is not a signatory to the agreement. This could indicate that Canadians are still learning about the content and countries involved in the agreement during the current 'discovery' phase.

Overall, the *2015 National Opinion Poll: Canadian Views on the Trans-Pacific Partnership* suggests Canadians' attitudes toward the TPP have yet to align with their positive attitudes toward trade in general. There are some issues that give Canadians pause, but reminding Canadians that the TPP countries include trusted international partners, outlining the opportunities that exist in the agreement, and explaining the potential risks of being left on the outside will help earn Canadians' support for the Trans-Pacific Partnership.

ABOUT THE ASIA PACIFIC FOUNDATION OF CANADA

The Asia Pacific Foundation of Canada (APF Canada) is a not-for-profit organization focused on Canada's relations with Asia. Our mission is to be **Canada's catalyst for engagement with Asia and Asia's bridge to Canada.**

A leader in research and analysis on Canada-Asia relations for over 30 years, APF Canada partners with government, business leaders, academics, and opinion makers in Canada and across the Asia Pacific region to offer clear, specific, and actionable policy advice.

Established by an Act of Parliament in 1984, APF Canada's thematic priorities include: promoting trade, investment, and innovation; mobilizing energy assets; building skills and competencies; and, understanding Asia now.

ABOUT THE NATIONAL OPINION POLL

Since 2004, the Asia Pacific Foundation of Canada has been conducting regular nationwide surveys to assess Canadians' attitudes toward Canada-Asia relations.

Our most recent survey focuses on the issue of the Trans-Pacific Partnership (TPP). The survey looks at what Canadians know about the TPP, what effects they think the agreement will have on the country's economy, and what Canadians think about international trade and trade agreements more broadly. We hope that our findings will contribute to an ongoing national debate about the TPP, identifying critical knowledge gaps and shedding light on how Canadians view the tough trade-offs that accompany large-scale economic agreements.

METHODOLOGY

The Asia Pacific Foundation of Canada commissioned EKOS Research Associates to conduct a survey of 1,554 Canadian adults who are participants in the Probit online survey panel.

The survey was conducted from September 9 to September 17, 2015. The margin of error—which measures sampling variability—is +/- 2.5% for the entire sample. The median completion time for the survey was 9.5 minutes. The results have been statistically weighted by EKOS according to the current census data on age, gender, and region to ensure that the sample is representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding.

KEY FINDINGS

CANADIANS ARE DIVIDED ON THE TPP

Approximately two-fifths (41%) of Canadians support the prospective trade agreement, while an almost equal proportion of Canadians (38%) oppose the agreement. Placed in the context of previous polls about Canadian attitudes toward the TPP, these findings indicate the public is increasingly divided on the trade agreement.

CANADIANS ANTICIPATE SOME GOOD, SOME BAD OUTCOMES FROM THE TPP

Opinion is currently divided on whether the TPP will be good or bad for Canada's economy.

Overall, one-third (33%) of Canadians think the agreement will be good for the economy, almost one-third (31%) think it will be bad for the economy, and 15% think the TPP will be neither good nor bad for Canada's economy.

In terms of specific outcomes, Canadians see the TPP having a mix of positive and negative impacts. On the one hand, a majority of respondents think the TPP will lead to job loss (61%).

On the other hand, majorities also anticipate lower prices for consumers (53%), agree that the TPP will lessen Canadian dependence on the U.S. market (60%), and see the TPP leading to friendlier relations with other countries (65%).

CANADIANS SUPPORT FREE TRADE AGREEMENTS WITH THE COUNTRIES IN THE TPP

Canadians view themselves as in favour of free trade.

66% of respondents say they support signing free trade agreements with other countries in general. A majority (52%) says international trade has helped the Canadian economy overall, with 33% saying international trade has hurt the Canadian economy.

There is strong support for trade agreements with the specific countries in the TPP zone. For nine of the 11 TPP countries, a majority of Canadians support a free trade agreement. Support is particularly high for FTAs with some of the larger TPP signatories, such as Australia (77%), the U.S. (77%) and Japan (70%). There is clearly a gap between Canadians' strong support for trade and free trade agreements generally, and their soft support for the TPP specifically.

CANADIANS HAVE LIMITED KNOWLEDGE OF THE TPP

Results show that Canadians have limited knowledge of the TPP.

In three of the four knowledge questions, the most common answer was “don’t know.” In particular, Canadians are unclear as to which countries are in the TPP. For instance, more Canadians incorrectly identify China as a country in the TPP (35%) than those that correctly identify China as not being in the TPP (20%). Those who have the most knowledge of the TPP also tend to be the most supportive of the agreement.

SUPPORT FOR THE TPP IS LIKELY TO GROW

Canadians support international trade and free trade agreements.

In almost all cases, Canadians strongly support signing bilateral FTAs with the member countries of the TPP. This suggests that Canadians’ attitudes toward the TPP have yet to align with their positive attitudes toward trade in general.

One reason support for the TPP lags behind support for trade in general is simply Canadians’ lack of knowledge about the agreement. This is understandable. The negotiations themselves were secret, and the public has had limited exposure to the potential content of the agreement. Press coverage has only recently picked up as the negotiating countries approached a final agreement. Citizens are still learning what the TPP is.

Perhaps most importantly, there remains some mystery about who is in the TPP zone. Canadians have a tendency to prefer trade and trade agreements with countries they trust. On that score, the TPP contains many countries Canadians respect and trust, but Canadians have yet to make this connection. While education as to what is in the TPP will provide important information allowing Canadians to make informed assessments of the agreement, clearing up the issue of who is participating is likely to shift undecided Canadians toward support.

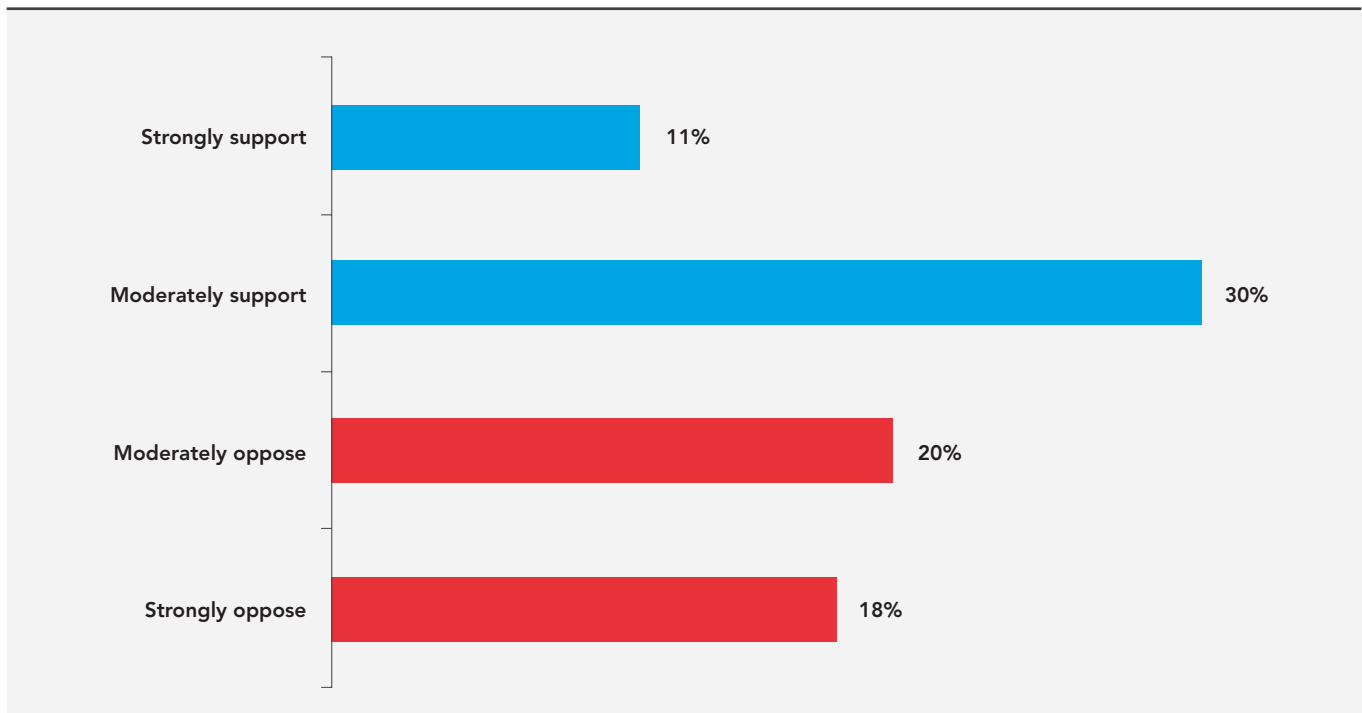
SURVEY RESULTS

SECTION 1 – SUPPORT FOR THE TPP

Canadians are split on their views toward the Trans-Pacific Partnership. Approximately two-fifths (41%) of Canadians support the recently signed regional trade agreement, while an almost equal proportion of Canadians (38%) oppose it.

Opposition tends to be more intense than support—almost one-fifth (18%) express “strong opposition” to the TPP, while only 11% express “strong support.”

Canadians are divided on the TPP



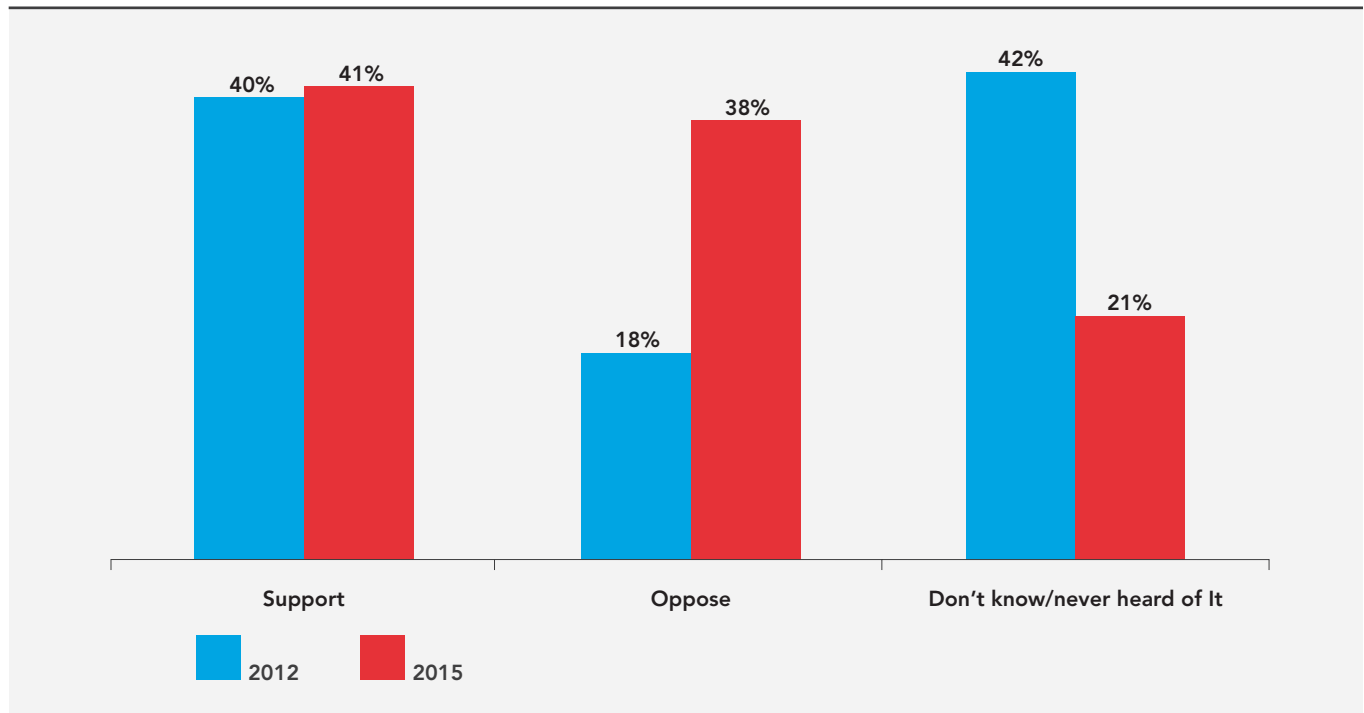
Base: All respondents (n = 1,554)

Q4: Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada's government approving the TPP?

Placed in the context of previous polls about Canadian attitudes toward the TPP, these findings indicate increasing polarization. Within APF Canada’s surveys, the expressed level of support has remained steady over time; in APF Canada’s *2012 National Opinion Poll on Canadians’ Attitudes Towards Asia*, 40% supported the TPP, close to the

finding of 41% from 2015.¹ What has changed is the proportion of Canadians now expressing opposition to the agreement. In the same 2012 APF Canada poll, one-fifth (18%) said they were opposed to Canada entering TPP negotiations, well below the two-fifths (38%) opposing the agreement in 2015.

Canadians are increasingly skeptical of the TPP



Base: All respondents (2015: n = 1,554; 2012: n = 3,129)
 Q4: [2015] Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada’s government approving the TPP?
 Q16: [2012] Based on what you have read, seen, heard and know about the Trans-Pacific Partnership to what degree do you support or oppose Canada joining the TPP?

Some of the shift can potentially be explained by alterations in question wording, but the trend is also apparent in surveys completed by the Angus Reid Institute (ARI). In a survey completed in the spring of 2015, ARI found that 41% supported the TPP, and just 11% of Canadians said they were opposed to Canada joining the TPP.² A similar survey in September of this year found that

support had dropped to 33%, and opposition had risen to 21%.³

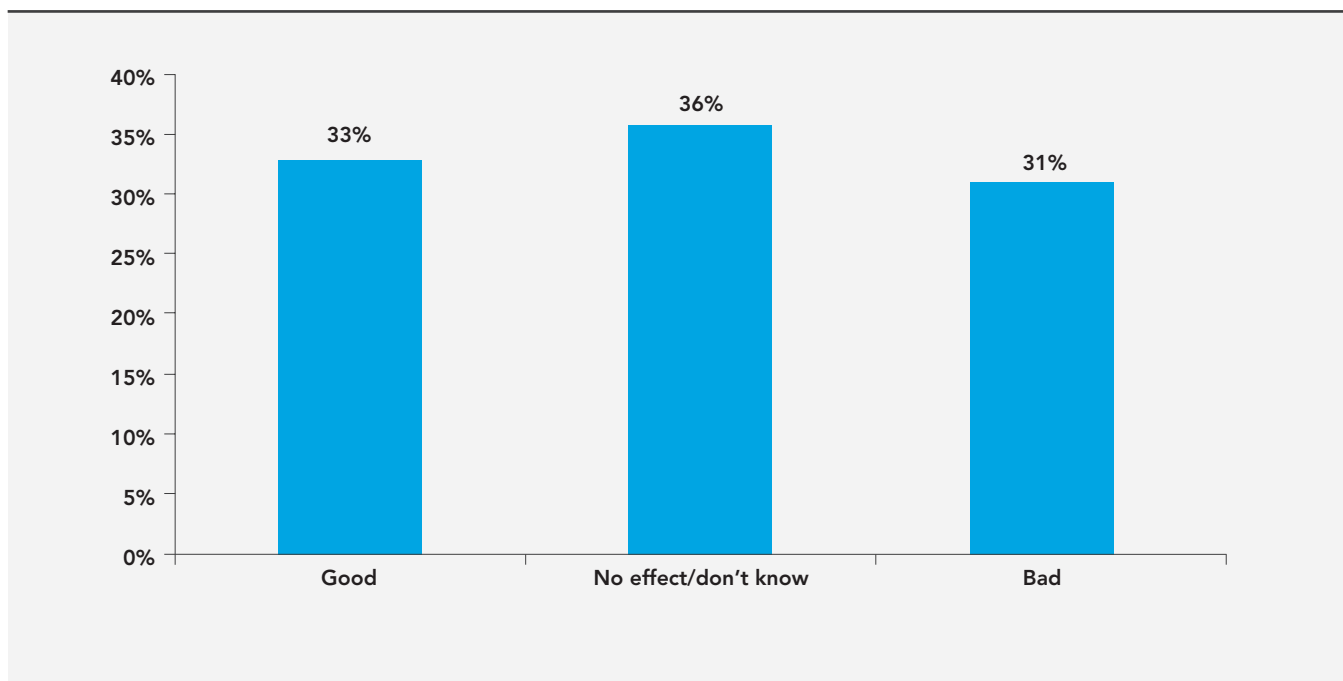
APF Canada’s 2015 survey largely confirms trends from previous polls. First, there is a strong base of support for the TPP, and opposition has to date not outpaced support. Second, the level of opposition to the agreement has increased over time.

SECTION 2 - EFFECTS OF THE TPP

Canadians are increasingly split regarding the impact they feel the TPP will have on Canada’s economy. Opinion is currently divided on whether the TPP will be good or bad for Canada’s economy. One-third (33%) of Canadians think

the agreement will be good for the economy, almost one-third (31%) think it will be bad for the economy, and 15% think the TPP will be neither good nor bad for Canada’s economy.

Canadians split on whether the TPP will be good or bad for the country’s economy



Base: All respondents (n = 1,554)

Q6: Do you think the Trans-Pacific Partnership would be good or bad for Canada’s economy?

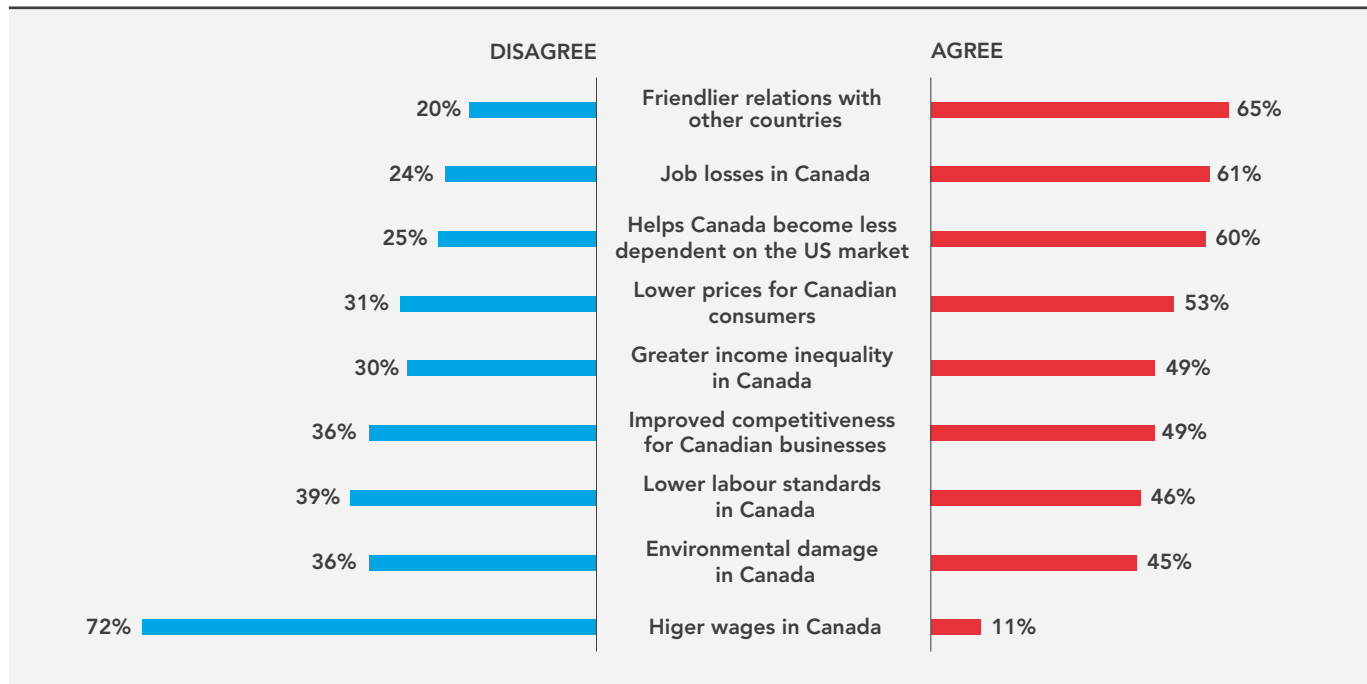
The divide on the potential impact of the TPP is recent. For instance, a 2012 poll by Nanos found that 43% of Canadians thought that a free trade agreement with the TPP nations would have a positive impact on our economy, and only 18% associated the deal with negative impacts.⁴ Likewise, a *Canadian Business* poll found that 55% of Canadians agreed that the TPP would be good for Canada’s economy and 29% disagreed.⁵ Although a precise comparison cannot be made because of question wording, APF Canada’s 2015 survey suggests opinion about the benefits and drawbacks of the TPP are now more divided than in the past.

To understand why Canadians may be for or against the TPP, and why they think it may be

good or bad for the country’s economy, we asked a series of follow-up questions about the potential outcomes of the agreement.

Many Canadians see both economic benefits and costs to the new trade agreement. Over three-fifths (61%) agree that the TPP will lead to job losses in Canada, more than twice the proportion (24%) who disagree. Only 11% of Canadians agree that the TPP will lead to higher wages, while 72% disagree. Further, half (49%) of Canadians agree that the TPP will lead to greater income inequality; only one-third (30%) disagree. There is a relatively even split on labour standards, with 46% agreeing that the TPP will lead to lower labour standards in Canada, and 39% disagreeing.

Canadians see the TPP as having both benefits and drawbacks for the country



Base: All respondents (n = 1,554)

Q7: Do you agree or disagree that signing the Trans-Pacific Partnership helps Canada become less dependent on the US market?

Q8: Do you agree or disagree that the Trans-Pacific Partnership will lead to each of the following?

Nonetheless, Canadians do anticipate some beneficial economic outcomes from the TPP. Half (53%) of respondents agreed that the TPP will lead to lower prices for Canadian consumers; just one-third (31%) disagreed. And, when respondents are asked about business competitiveness, half (49%) agreed that the TPP would lead to increased competitiveness for Canadian businesses, while one-third (36%) disagreed. When asked whether signing the TPP helps Canada become less dependent on the U.S. market, three-fifths (60%) expressed agreement, and only one-quarter (25%) disagreed.

Beyond the potential economic impacts of the agreement, respondents also see benefits and

drawbacks the deal may have on Canada's environment and our relations with the outside world. A little under half (45%) of respondents agreed that the TPP would lead to environmental damage in Canada; approximately one-third (36%) disagreed with the statement.

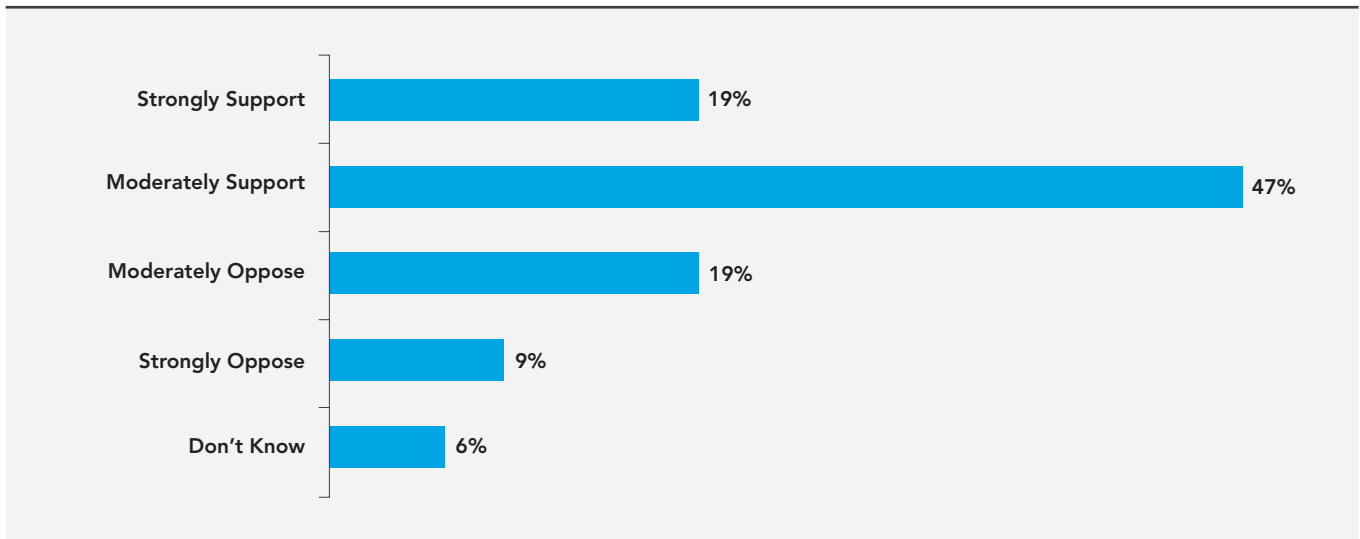
Though Canadians see potential for an environmental cost in their own country, they also see closer trading ties improving Canada's relations with the world; two-thirds (65%) agreed that the TPP would lead to "friendlier relations with other countries;" only 20% disagreed. For most Canadians, strengthening trade ties with a country is synonymous with improving diplomatic relations.

SECTION 3 - SUPPORT FOR TRADE

Canadians' support for the TPP is modest compared to the country's overall support for trade and free trade agreements. Two-thirds (66%) of respondents said they support free trade agreements (FTAs) between Canada and other countries in general. Less than one-third (28%) oppose FTAs with other countries. This

closely matches findings from APF Canada's 2014 *National Opinion Poll*, which found that 68% of Canadians support the Canadian government entering into free trade agreements with other countries.⁶ In this light, most Canadians instinctively think of themselves as free traders.

Canadians support free trade agreements in general



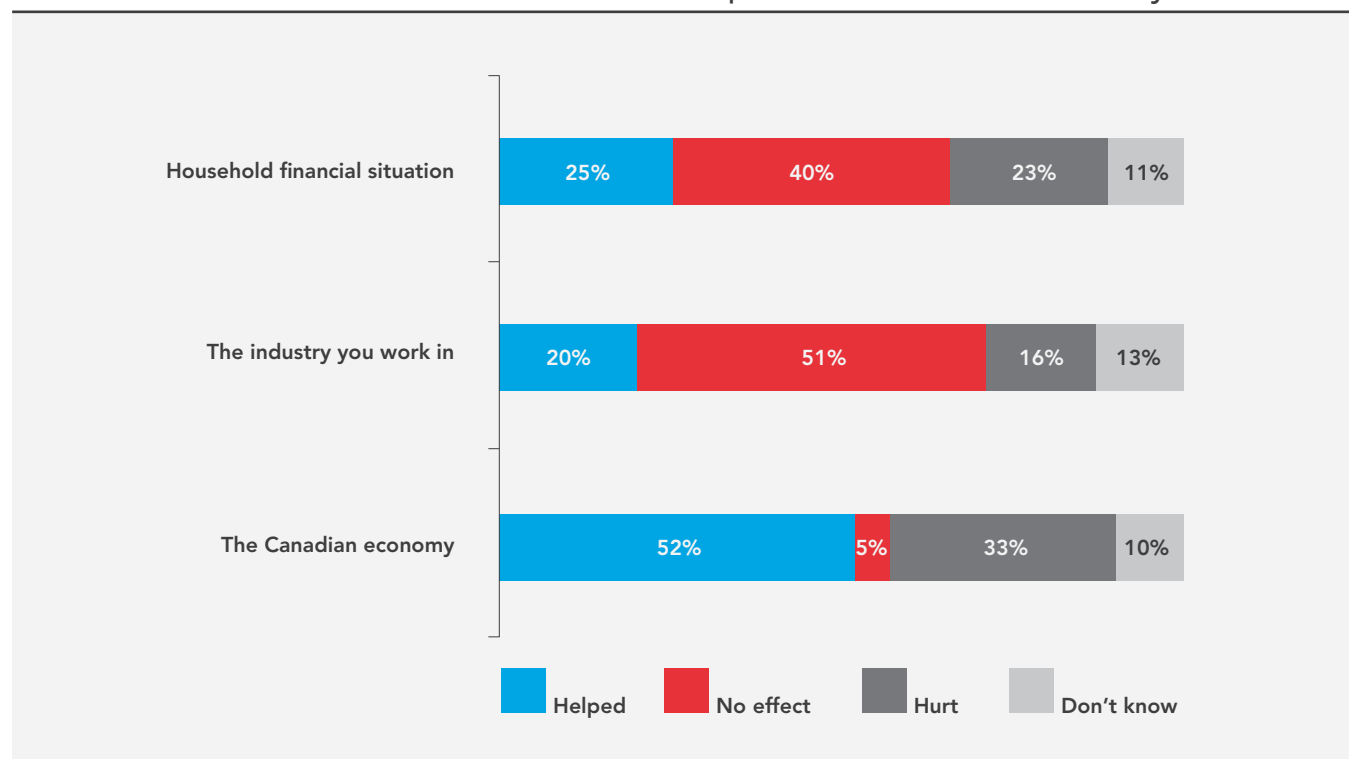
Base: All respondents (n = 1,554)

Q3: In general, do you support or oppose free trade agreements between Canada and other countries?

The high level of support for free trade agreements in general is, in part, rooted in the opinion that international trade has helped the Canadian economy. Respondents were asked whether they thought international trade helped, hurt, or had no effect on their household financial situation, the industry they work in, or the Canadian economy. A majority (52%) says that international trade has helped the Canadian economy overall, with a third (33%) saying it hurt the Canadian economy. Canadians are less likely to make a direct link between international trade and either

their household financial situation or the health of the industry they work in. An equal proportion of Canadians responded that international trade either helped (25%) or hurt (23%) their household financial situation; the largest group (40%) thought international trade had no effect on their household's financial situation. A slim majority (51%) responded that international trade had no effect on the industry they work in, with only 20% saying trade helped their industry, and 16% saying it hurt their industry.

Canadians think international trade has helped the national economy



Base: All respondents (n = 1,554)

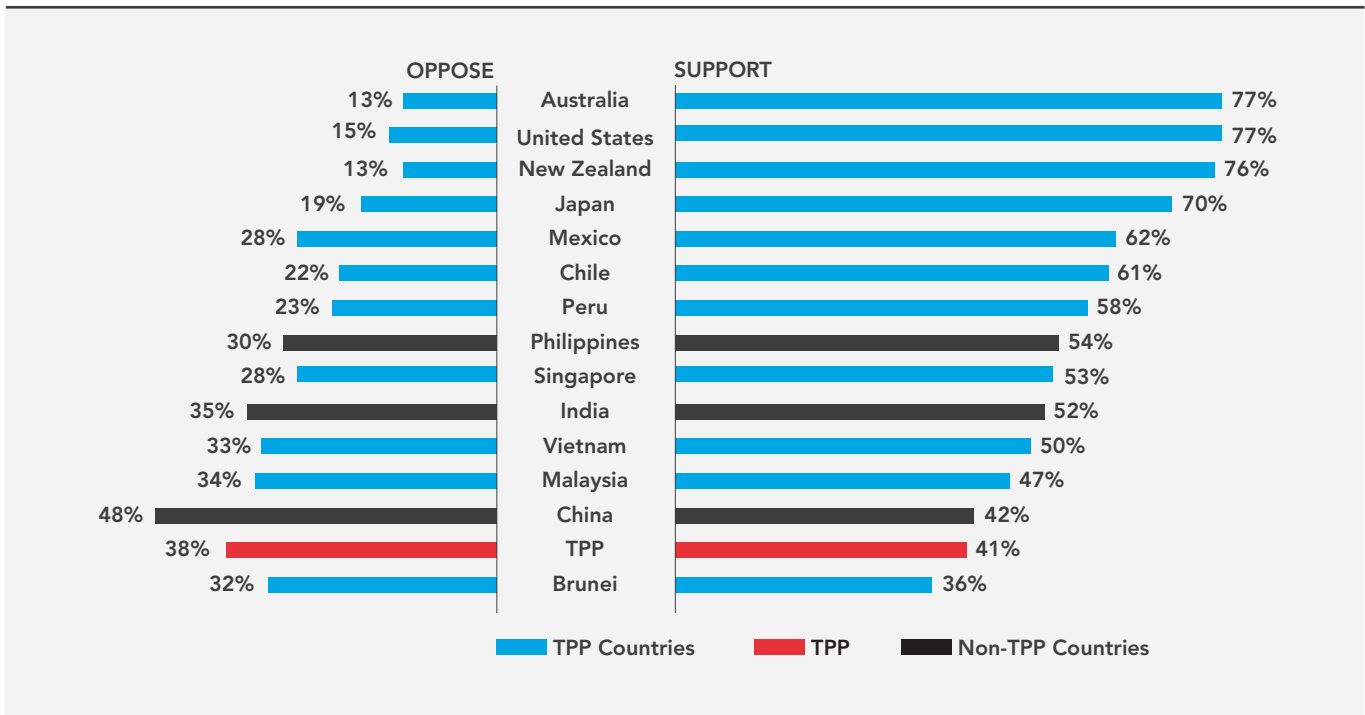
Q2: In your view, has Canada's international trade with other countries helped, hurt, or has it had no effect on each of the following:

While Canadians are divided on the TPP, there is strong support for free trade with the 11 other member countries within the TPP zone. Support is particularly high for Australia (77%), the U.S. (77%), New Zealand (76%) and Japan (70%). Likewise, there is strong support for FTAs with the TPP's Latin American countries, with majorities of Canadians supporting free trade with Mexico (62%), Chile (61%) and Peru (58%). There is also majority support for an FTA with two of the four Southeast Asian countries (Singapore: 53%; Vietnam: 50%). There is slightly less than majority (47%) support for an FTA with

Malaysia, and there is a near even split on an FTA with Brunei (support: 36%; oppose: 32%), the Southeast Asian microstate.

APF Canada also asked about support for a free trade agreement with three major Asian economies not participating in TPP negotiations: China, India and the Philippines. Majorities expressed support for an FTA with both the Philippines (54%) and India (52%). Opinion was more mixed on an agreement with China; while 42% of Canadians support an FTA with China, 48% express opposition.

Canadians support trade agreements with TPP countries



Base: All respondents (n = 1,554)

Q4: Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada's government approving the TPP?

Q5: Do you support or oppose a free trade agreement between Canada and the following countries:

SECTION 4 - KNOWLEDGE OF THE TPP

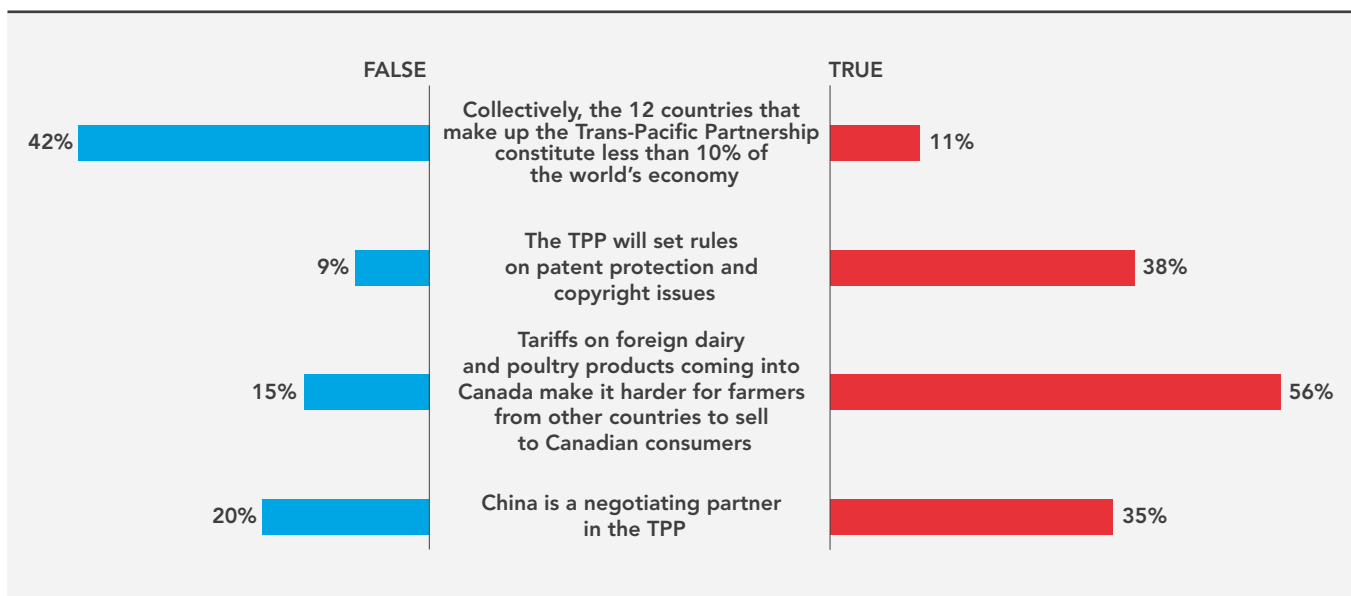
Canadians support free trade agreements with most of the countries included in the TPP. This enthusiasm is consistent with Canadians' more general support for trade and free trade agreements. Yet there is a clear gap between support for trade with TPP partners, and support for the TPP itself.

One reason this may be the case is simply that Canadians do not have a clear understanding of who is in the TPP. Past surveys indicated that Canadians may not know much about the agreement. In APF Canada's *2012 National Opinion Poll*, 31% said they had not heard of the TPP, and

a 2015 survey by the Angus Reid Institute found that almost half (48%) of respondents could not offer an opinion on the issue. A 2015 poll by Trade Justice Network, a collective of civil society groups, found that 75% of Canadians have never heard of the TPP.⁷

In APF Canada's 2015 poll, we asked a series of factual questions to probe Canadians' knowledge of the TPP. Results show that respondents' knowledge of the TPP is modest. In three of the four knowledge questions, the plurality answer was, "don't know."

Canadians' knowledge of the TPP is still low



Base: All respondents (n = 1,554)

Q1: Please indicate whether you think each of the following statements about the TPP is true or false:

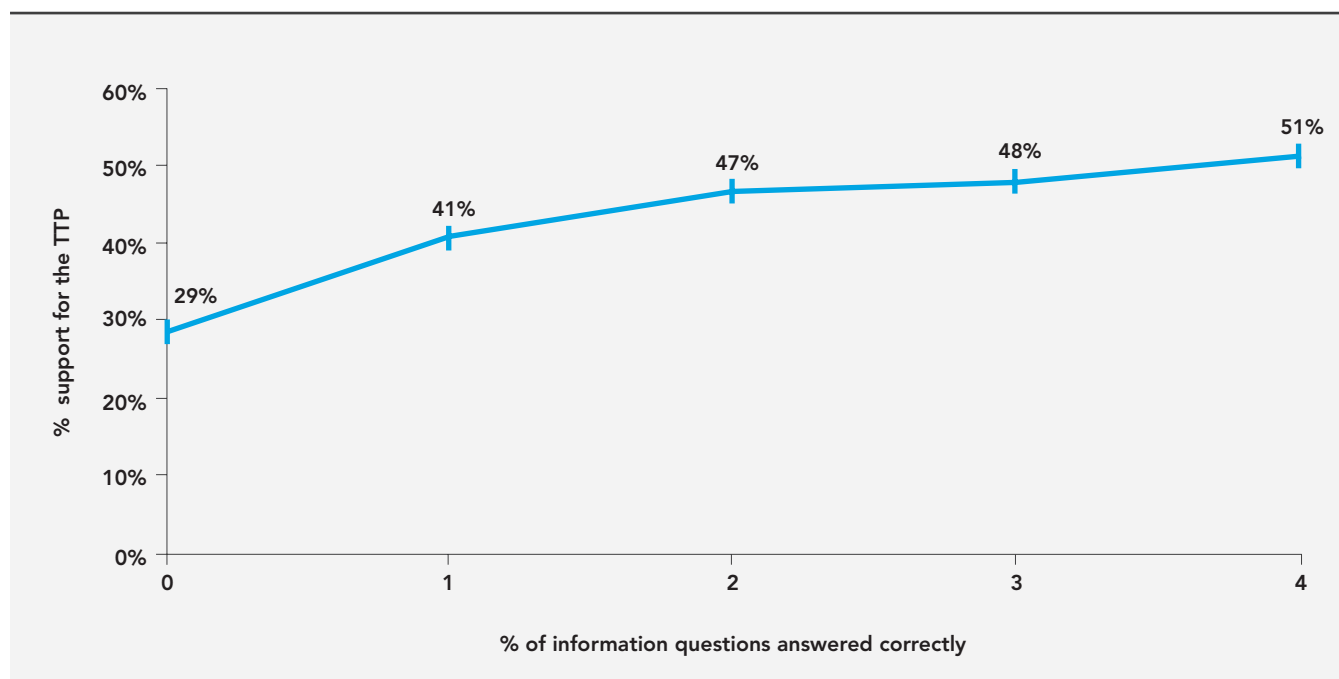
Although a large group of Canadians did not provide an answer to the knowledge questions, among those who answered the questions, respondents often knew the correct answer. 42% correctly identified as false the statement that, “Collectively, the 12 countries that make up the Trans-Pacific Partnership constitute less than 10% of the world’s economy.” The more accurate figure, frequently mentioned in the media, is that the countries within the TPP constitute approximately 40% of the world’s economy, as measured by gross domestic product. Only 11% of respondents answered this question incorrectly.

There was a similar background question about intellectual property rights, one of the most discussed policy issues in coverage of the TPP.⁸ Two-fifths (38%) correctly identified as true the statement, “The TPP will set rules on patent protection and copyright issues.” 9% incorrectly identified the statement as false.

Supply management has figured prominently in coverage of the TPP. The only question a majority of Canadians correctly answered was, “Tariffs on foreign dairy and poultry products coming into Canada make it harder for farmers from other countries to sell to Canadian consumers.” Over half (56%) correctly responded that the statement was true, and only 15% said the statement was false.

There are clear signs of confusion about the partners within the TPP. When provided with the statement, “China is a negotiating partner in the TPP,” one-third (35%) of respondents said true, while only one fifth (20%) correctly identified the statement as false. Out of all of the knowledge questions asked, respondents were least likely to answer this question correctly. The result helps shed some light on why Canadians are more supportive of trade agreements with specific TPP member states than they are the TPP itself: they remain unsure of the set of “Partners” in the “Trans-Pacific Partnership.”

The most informed Canadians express the highest support for the TPP



Base: All respondents (n = 1,554)

Q4: Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada's government approving the TPP?

Note: Information scale constructed from number of accurate answers provided in Q.1

Given Canadians' general support for trade, it is not surprising that those respondents with the most knowledge of the TPP were also those most supportive of the agreement. Each respondent was categorized by how many questions they correctly answered. For those who did not identify any correct answers—typically those answering “don't know” to all four questions—only 29%

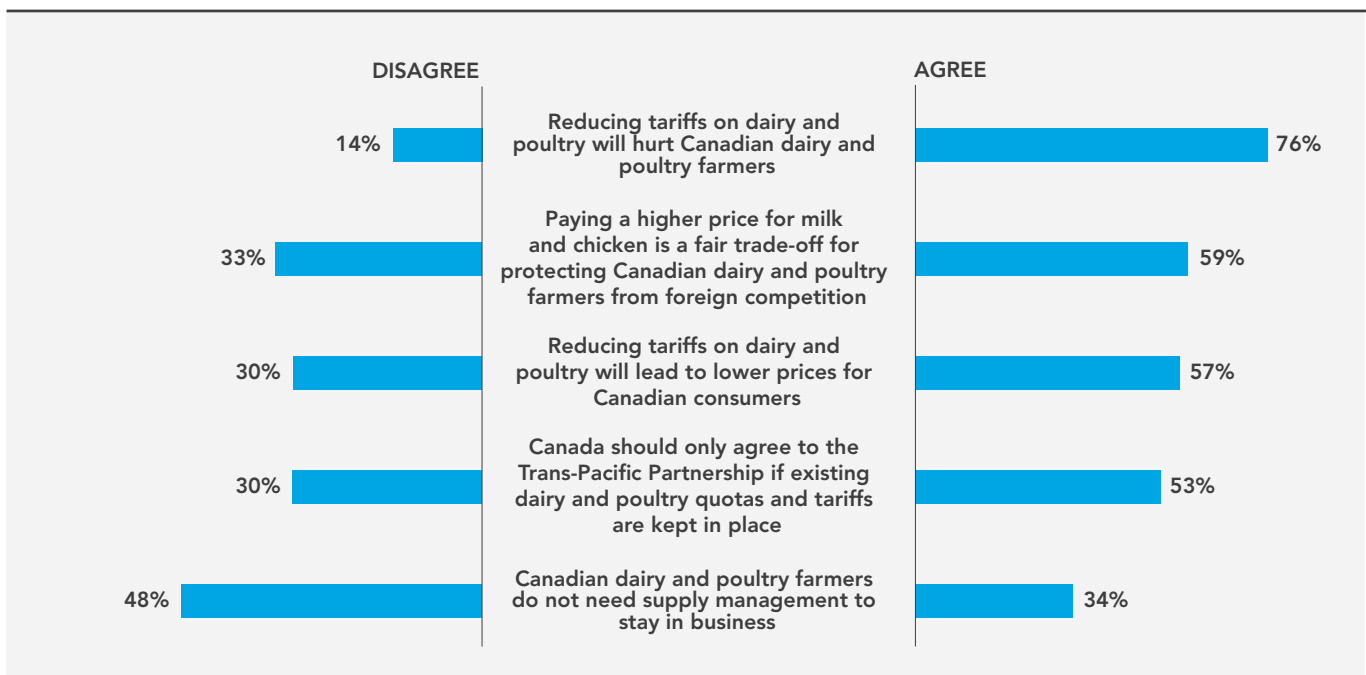
offered support for the TPP. Among those with the highest knowledge of the TPP—those who answered all four questions correctly—a majority (51%) offered support for the agreement. In general, those who have the most knowledge of the TPP tend to be the most supportive of the agreement.

SECTION 5 - SUPPLY MANAGEMENT

In all of the coverage of the TPP within Canada, no issue has received more attention than that of supply management, a system of government tariffs, quotas, and price controls that govern the production and sale of certain agricultural products, including dairy and poultry. Canada’s TPP partners want access to the country’s agricultural

markets, just as Canadian agricultural exporters want access to our partners’ markets. Many farmers in supply-managed sectors fear they will lose out if the system is changed. Since supply management is so prominent within the Canadian coverage of TPP, we probed opinions on Canadian attitudes toward the issue.

Canadians have positive views of the supply management system



Base: All respondents (n = 1,554)

Q9: Do you agree or disagree with the following statements about supply management in Canada?

In general, respondents think the supply management system helps Canadian dairy and poultry farmers. Three quarters of Canadians (76%) agree that reducing tariffs on dairy and poultry will hurt Canadian dairy and poultry farmers. While Canadians overwhelmingly think farmers under

supply management benefit from protection, they are more split on whether farmers need the system to survive. Half (48%) disagreed with the statement, “Canadian dairy and poultry farmers do not need supply management to stay in business,” and one-third (34%) expressed agreement.

Canadians are aware that shifting away from a supply-managed system will likely benefit consumers. Over half (57%) of respondents expressed agreement with the statement, “Reducing tariffs on dairy and poultry will lead to lower prices for Canadian consumers.” About half as many (30%) respondents disagreed with the statement.

Taking the interests of the producer and consumer into consideration, most Canadians are still positively inclined toward supply management. Three fifths (59%) expressed agreement with the statement, “Paying a higher price for milk and chicken is a fair trade-off for protecting Canadians dairy and poultry farmers from foreign competition.” One third (33%) expressed disagreement. Furthermore, a majority of Canadians (53%) expressed agreement with the statement, “Canada should only agree to the Trans-Pacific Partnership if existing dairy and poultry quotas and tariffs are kept in place.” Again, only one third (30%) expressed disagreement.

One finding that stands out in the results is the relatively strong support for supply management in Quebec. Compared to the rest of Canada, respondents in Quebec were more likely to think dairy farmers require supply management to stay in business, more willing to pay higher prices if it meant protection for farmers, and more willing to tie their support for the TPP to the protection of supply management.

Overall, our findings on supply management reinforce a 2012 poll done by *Canadian Business*, which found Canadians have “strong support for Canada’s supply management system for dairy and poultry producers despite our strong belief in the importance of joining the Trans-Pacific Partnership.”⁹ For all their support for free trade agreements, Canadians are sympathetic to the well-being of those farmers worried about dismantling the supply management system.

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CONCLUSION

On October 5, 2015, the 12 countries involved in the TPP announced they had arrived at an agreement during the chief negotiators' meeting in Atlanta. *The New York Times* called it “the largest regional trade accord in history.”¹⁰ When implemented, the TPP will have an important impact on the Canadian economy, not the least of which will be more fully orienting the country's trading relations toward the economies of the Asia Pacific region.

Before the TPP can be implemented, however, it must be approved by the participating states. In Canada, the government has said the decision to approve the TPP will rest with Parliament. Canadians should expect to see a period of increased scrutiny of the TPP as Parliament discusses the relative merits of the TPP's provisions, and debates the benefits and drawbacks of approving and implementing the final agreement.



In the lead up to the parliamentary debate, proponents and opponents of the TPP will be taking their case to the Canadian public. For those in favour of the TPP, it will be important to align Canadians' views on the TPP with their broader support for international trade and trade agreements in general. There are some issues that give Canadians pause about the agreement, such as the desire to support the perceived interests of dairy farmers. These issues will require careful attention and management. The opportunities that exist in the agreement, and the potential risks of being left on the outside, are also important to spell out.

Proponents should also take the time to explain who Canada's “Partners” in the Trans-Pacific Partnership will be. Most Canadians are positively inclined to trade and trade agreements, and this is particularly true for engagement with trusted partners. For the most part, Canadians are enthusiastic to economically engage the countries that make up the TPP, but they remain unclear who is included in the agreement. Proponents of the agreement will have an easier time making their economic case to the Canadian public once they have reminded Canadians the TPP countries include many of Canada's trusted international partners.

APPENDIX

Albertans best understand the economic magnitude of the TPP



		CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
Collectively, the 12 countries that make up the Trans-Pacific Partnership constitute less than 10% of the world's economy	True	11%	12%	6%	15%	10%	12%	15%
	False	42%	44%	47%	43%	42%	41%	34%
The TPP will set rules on patent protection and copyright issues	True	38%	42%	41%	37%	43%	28%	33%
	False	9%	8%	7%	6%	8%	13%	11%
Tariffs on foreign dairy and poultry products coming into Canada make it harder for farmers from other countries to sell to Canadian consumers	True	56%	58%	56%	61%	57%	53%	49%
	False	15%	14%	9%	14%	15%	17%	13%
China is a negotiating partner in the TPP	True	35%	34%	32%	33%	37%	34%	40%
	False	20%	23%	18%	23%	19%	20%	13%

	% is higher than other provinces and statistically significant
	% is lower than other provinces and statistically significant

Base: All respondents (n = 1,554)

Q1: Please indicate whether you think each of the following statements about the TPP is true or false:



Canadians living in Western provinces are more likely to see international trade as helping the economy

		CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
Your household's financial situation	Helped	25%	28%	35%	32%	24%	20%	25%
	No Effect	40%	34%	39%	39%	38%	47%	46%
	Hurt	23%	25%	18%	17%	28%	22%	14%
The industry you work in	Helped	20%	25%	29%	26%	19%	17%	12%
	No Effect	51%	42%	48%	51%	51%	54%	64%
	Hurt	16%	19%	9%	14%	18%	16%	10%
The Canadian economy	Helped	52%	53%	66%	55%	49%	50%	55%
	No Effect	5%	3%	4%	7%	2%	9%	6%
	Hurt	33%	34%	21%	30%	39%	30%	29%
		 % is higher than other provinces and statistically significant  % is lower than other provinces and statistically significant						

Base: All respondents (n = 1,554)

Q2: In your view, has Canada's international trade with other countries helped, hurt, or has it had no effect on each of the following:

Ontario is the province least supportive of the TPP

		CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
To what degree do you support or oppose Canada's government approving the TPP?	Support	41%	40%	48%	46%	37%	44%	46%
	Oppose	38%	47%	31%	33%	43%	33%	27%
In general, do you support or oppose free trade agreements between Canada and other countries?	Support	66%	57%	74%	70%	63%	67%	75%
	Oppose	28%	37%	21%	21%	31%	25%	20%
		 % is higher than other provinces and statistically significant  % is lower than other provinces and statistically significant						



Base: All respondents (n = 1,554)

Q3: In general, do you support or oppose free trade agreements between Canada and other countries?

Q4: Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada's government approving the TPP?

Alberta is the province most supportive of signing free trade agreements, while Ontario is the least supportive

		CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
Australia	Support	77%	74%	84%	74%	76%	76%	76%
	Oppose	13%	19%	8%	12%	14%	13%	7%
United States	Support	77%	71%	80%	77%	78%	79%	78%
	Oppose	15%	25%	12%	12%	16%	13%	9%
New Zealand	Support	76%	75%	84%	74%	75%	74%	74%
	Oppose	13%	18%	7%	11%	14%	15%	9%
Japan	Support	70%	73%	78%	70%	67%	72%	68%
	Oppose	19%	21%	14%	15%	22%	18%	15%
Mexico	Support	62%	58%	72%	71%	55%	69%	58%
	Oppose	28%	35%	20%	16%	34%	22%	25%
Chile	Support	61%	61%	67%	62%	57%	65%	60%
	Oppose	22%	27%	17%	17%	25%	20%	17%
Peru	Support	58%	60%	64%	61%	54%	60%	60%
	Oppose	23%	27%	19%	15%	26%	22%	15%
Philippines	Support	54%	57%	60%	64%	51%	50%	56%
	Oppose	30%	32%	27%	18%	31%	34%	23%
Singapore	Support	53%	57%	63%	59%	49%	53%	51%
	Oppose	28%	32%	23%	19%	31%	29%	20%
India	Support	52%	54%	58%	55%	49%	52%	54%
	Oppose	35%	38%	32%	29%	38%	34%	26%
Vietnam	Support	50%	50%	57%	59%	47%	51%	50%
	Oppose	33%	37%	29%	21%	36%	33%	26%
Malaysia	Support	47%	49%	51%	58%	44%	46%	48%
	Oppose	34%	39%	34%	23%	36%	36%	25%
China	Support	42%	33%	49%	45%	38%	47%	51%
	Oppose	48%	59%	44%	40%	52%	43%	34%
Brunei	Support	36%	36%	42%	42%	35%	35%	40%
	Oppose	32%	41%	30%	23%	33%	32%	22%



 % is higher than other provinces and statistically significant
 % is lower than other provinces and statistically significant

Base: All respondents (n = 1,554)

Q5: Do you support or oppose a free trade agreement between Canada and the following countries:

The Prairie provinces are the most likely to view the TPP as good for Canada's economy

	CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
Good for Canada's economy	33%	30%	42%	39%	30%	31%	39%
Neither good nor bad for Canada's economy	15%	12%	15%	18%	14%	18%	15%
Bad for Canada's economy	31%	39%	25%	24%	35%	29%	23%



 % is higher than other provinces and statistically significant
 % is lower than other provinces and statistically significant

Base: All respondents (n = 1,554)

Q6: Do you think the Trans-Pacific Partnership would be good or bad for Canada's economy?

Quebec has the most positive perception of supply management

		CANADA	BC/YUKON	ALBERTA	SK/MB	ONTARIO	QUEBEC	ATLANTIC
Reducing tariffs on dairy and poultry will hurt Canadian dairy and poultry farmers	Agree	76%	83%	73%	76%	75%	78%	70%
	Disagree	14%	10%	17%	18%	14%	13%	12%
Paying a higher price for milk and chicken is a fair trade-off for protecting Canadian dairy and poultry farmers from foreign competition	Agree	59%	59%	58%	52%	59%	65%	54%
	Disagree	33%	34%	35%	38%	35%	27%	30%
Reducing tariffs on dairy and poultry will lead to lower prices for Canadian consumers	Agree	57%	59%	64%	60%	54%	57%	52%
	Disagree	30%	27%	25%	27%	32%	31%	24%
Canada should only agree to the Trans-Pacific Partnership if existing dairy and poultry quotas and tariffs are kept in place	Agree	53%	50%	43%	50%	51%	62%	51%
	Disagree	30%	36%	33%	33%	32%	24%	26%
Canadian dairy and poultry farmers do not need supply management to stay in business	Agree	34%	34%	37%	37%	35%	29%	37%
	Disagree	48%	44%	43%	48%	46%	58%	39%

 % is higher than other provinces and statistically significant
 % is lower than other provinces and statistically significant

Base: All respondents (n = 1,554)

Q9: Do you agree or disagree with the following statements about supply management in Canada:



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