



Dairy Farmers of Canada

NAFTA AND CANADIAN DAIRY SECTOR

April 2018

TABLE OF CONTENTS

03

Methodology & Objective

04

Conclusions

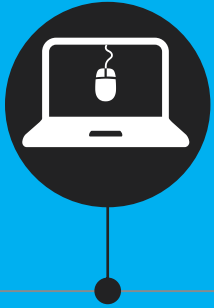
06

Results

12

Profile of Respondents

METHODOLOGY & OBJECTIVE



Online survey

- Omnibus web
- **Field:** April 26th to 27th



- Canada
- Adults of 18 years of age and more



n=1, 000

Representative of the national population*, distributed as follows:

- ☐ British Colombia: n=136
- ☐ Alberta: n=112
- ☐ Prairies: n=65
- ☐ Ontario: n=384
- ☐ Quebec: n=235
- ☐ Atlantic: n=68



Objective

- In line with the NAFTA renegotiation, DFC would like to assess Canadians' points of view with regard to the position of the Canadian government.

*Respondent bases reported are weighted



CONCLUSIONS

Conclusions

The majority of Canadians believe the Canadian dairy sector should be defended and that the government should make more efforts in that direction

3 Canadians out of 4 agree that the Canadian dairy sector should be defended in the context of the NAFTA renegotiation. Almost half of all Canadians (46%) totally agree with this statement.

- Ontarians and Quebecers are more likely to think so.

Three quarters (75%) of the Canadian population also believe that the federal government should make more efforts to defend the interests of the Canadian dairy sector in the context of the NAFTA renegotiation. Almost half of the population (48%) believe the government should make much more efforts.

- Respondents from Ontario and Quebec are more inclined to believe the government should make more efforts in defending the Canadian dairy sector's interests.

The ability of the government to protect the Canadian dairy industry is likely to impact Canadians' votes in the upcoming election

6 Canadians out of 10 declare that the extent to which the federal government will protect the interests of Canada's dairy industry will have an impact on their vote in the upcoming election. A quarter of respondents state that it will affect their vote a lot.

9 Canadians out of 10 believe U.S dairy products should be subject to the same norms as Canadian ones

7 Canadians out of 10 totally agree that U.S. dairy products coming into Canada should be subject to the same standards as Canadian dairy products and that this should be part of the terms of the new NAFTA agreement.

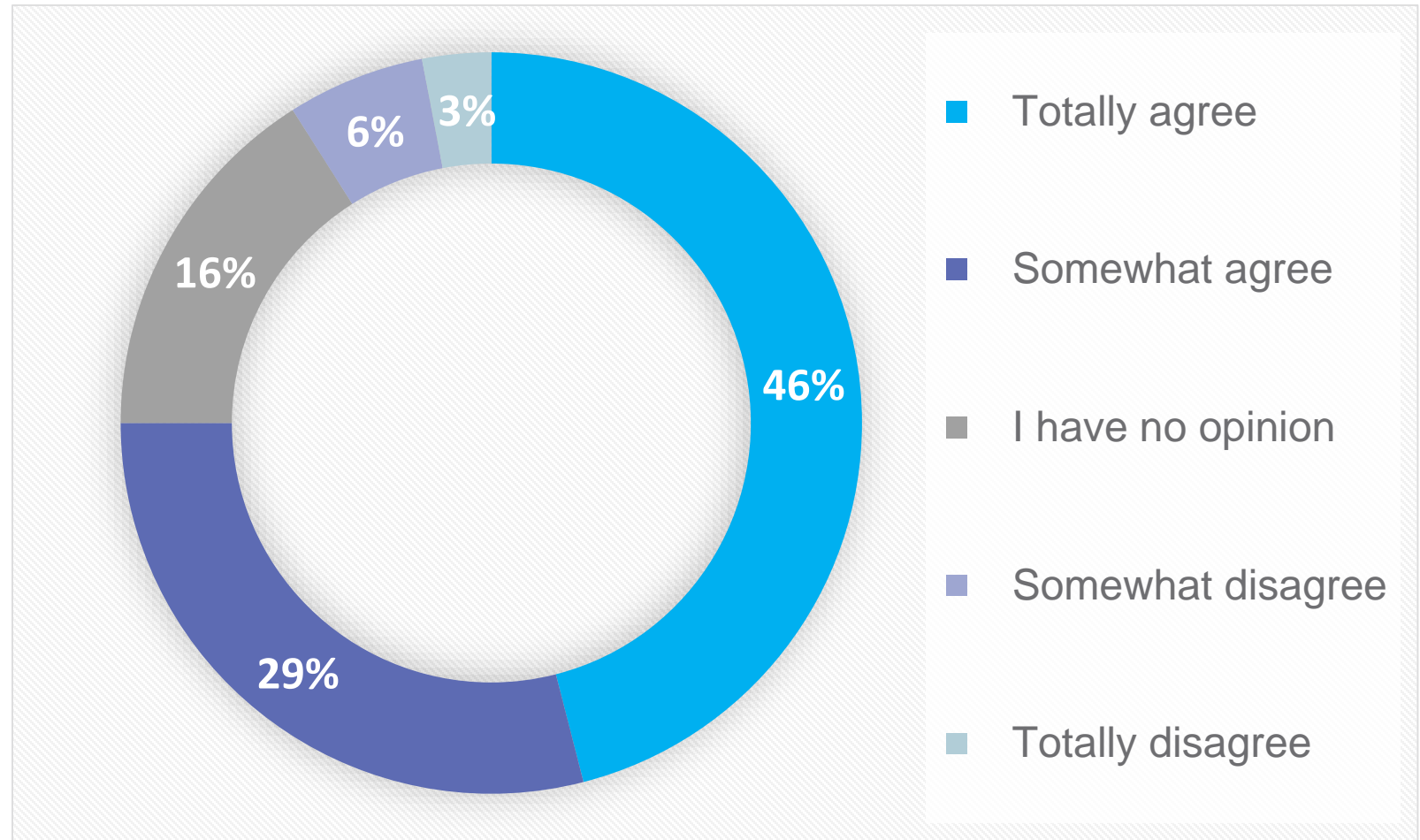
8 Canadians out of 10 (results of top 2 box) share Canadian dairy farmers' concerns with regard to the NAFTA renegotiation and the potential concessions that could result from this renegotiation.



RESULTS

Agreement with the defense of the Canadian dairy sector

Net agree:
75%



Base: Among all respondents (n=1000)

Agreement with the defense of the Canadian dairy sector



	TOTAL	REGION						GENDER		AGE			EDUCATION				HOUSEHOLD'S COMPOSITION	
		BC	AB	MB/SK	ON	QC	ATL	M	F	18-34	35-54	55+	<HS	HS	Post Sec	Univ. Grad	Kids	No kids
		A	B	C	D	E	F	G	H	K	L	M	N	O	P	Q	R	S
Base	1000	136	112	65	384	235	68	486	514	273	340	387	87	367	392	154	246	754
NET: AGREE	75%	66%	68%	78%	78% _A	79% _A	74%	79% _H	72%	65%	75% _K	83% _{KL}	70%	73%	78%	78%	76%	75%
Totally agree	46%	38%	33%	47%	45%	59% _{ABD}	50%	50% _H	43%	26%	49% _K	59% _{KL}	45%	44%	49%	47%	44%	47%
Somewhat agree	29%	28%	35% _E	31%	33% _E	20%	24%	29%	29%	39% _{LM}	26%	24%	25%	29%	29%	31%	32%	28%
Somewhat disagree	6%	7%	9%	5%	4%	6%	10%	6%	6%	8%	5%	5%	2%	8%	5%	7%	5%	6%
Totally disagree	3%	3%	5%	2%	3%	3%	1%	4%	2%	1%	4% _K	4%	4%	2%	4%	5% _O	3%	3%
I have no opinion	16%	25% _{DE}	18%	16%	14%	11%	15%	11%	20% _G	26% _{LM}	16% _M	8%	25% _Q	18% _Q	14%	10%	16%	16%

Base: Among all respondents (n=1000)

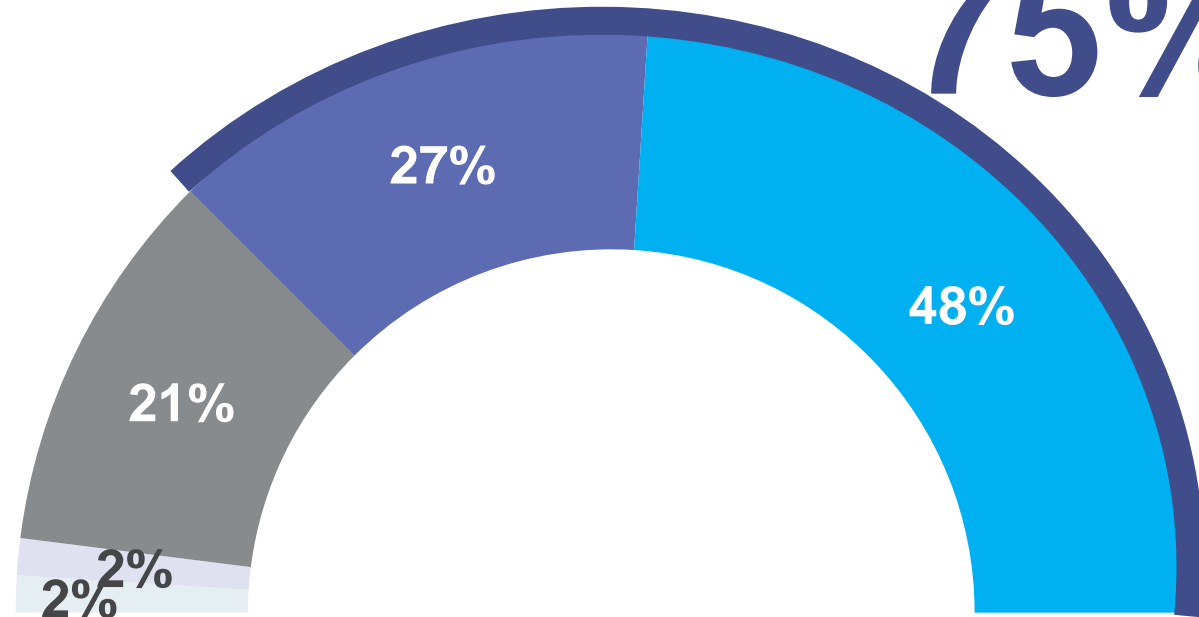


Q1. During the NAFTA renegotiation, the U.S. objects to the policy system of the dairy sector in Canada. Meanwhile the Canadian government claims that Canada already imports more dairy products from the U.S. than what it exports to the U.S.. To what extent do you agree that the Canadian dairy sector should be defended?

Expected level of efforts from the government to defend the Canadian dairy sector

Make more efforts
75%

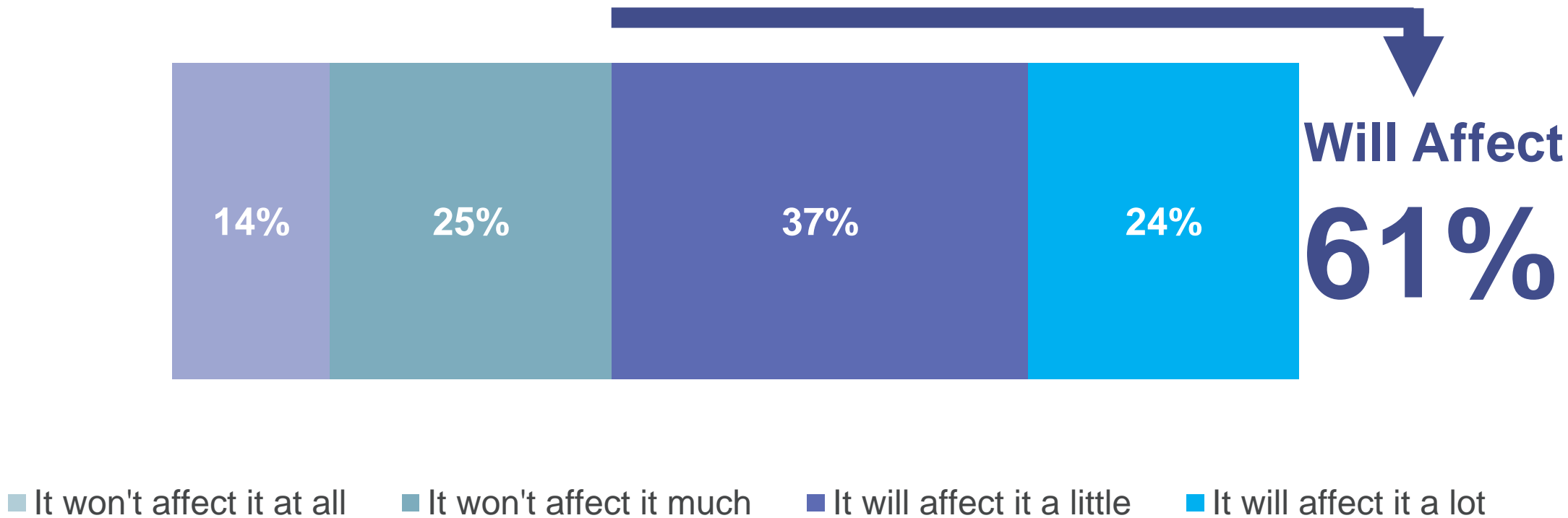
- Should make much less efforts
- Should make a bit less efforts
- Makes enough efforts
- Should make a bit more efforts
- Should make much more efforts



Expected level of efforts from the government to defend the Canadian dairy sector

	TOTAL	REGION						GENDER		AGE			EDUCATION				HOUSEHOLD'S COMPOSITION	
		BC	AB	MB/SK	ON	QC	ATL	M	F	18-34	35-54	55+	<HS	HS	Post Sec	Univ. Grad	Kids	No kids
		A	B	C	D	E	F	G	H	K	L	M	N	O	P	Q	R	S
Base	1000	136	112	65	384	235	68	486	514	273	340	387	87	367	392	154	246	754
NET: MAKE EFFORTS	75%	64%	71%	72%	74%_A	83%_{ABD}	77%	71%	78%_G	63%	79%_K	79%_K	74%	72%	78%_Q	72%	75%	74%
Should make much more efforts	48%	37%	46%	44%	48%	55%_A	49%	48%	47%	22%	51%_K	63%_{KL}	46%	51%_Q	48%_Q	40%	41%	50%
Should make a bit more efforts	27%	27%	25%	29%	26%	28%	29%	23%	31%_G	40%_{LM}	28%_M	16%	28%	21%	30%_O	31%_O	34%_S	25%
Makes enough efforts	21%	29%_E	22%	27%_E	21%_E	14%	20%	22%	20%	33%_{LM}	18%	15%	23%	23%	19%	19%	20%	21%
Should make a bit less efforts	2%	5%_E	3%	1%	2%	1%	2%	3%_H	1%	3%	1%	2%	-	3%_P	1%	5%_P	3%	2%
Should make much less efforts	2%	3%	4%	1%	3%	2%	1%	4%_H	1%	2%	2%	4%	2%	2%	2%	4%_P	2%	3%

Stated impact on Canadians' votes of the government's ability to protect the interests of Canada's dairy industry



Base: All respondents (n=1000)
Q3. To what extent will the federal government's ability to protect the interests of Canada's dairy industry in the NAFTA renegotiation with the United States affect your vote in the upcoming election?

Stated impact on Canadians' votes of the government's ability to protect the interests of Canada's dairy industry

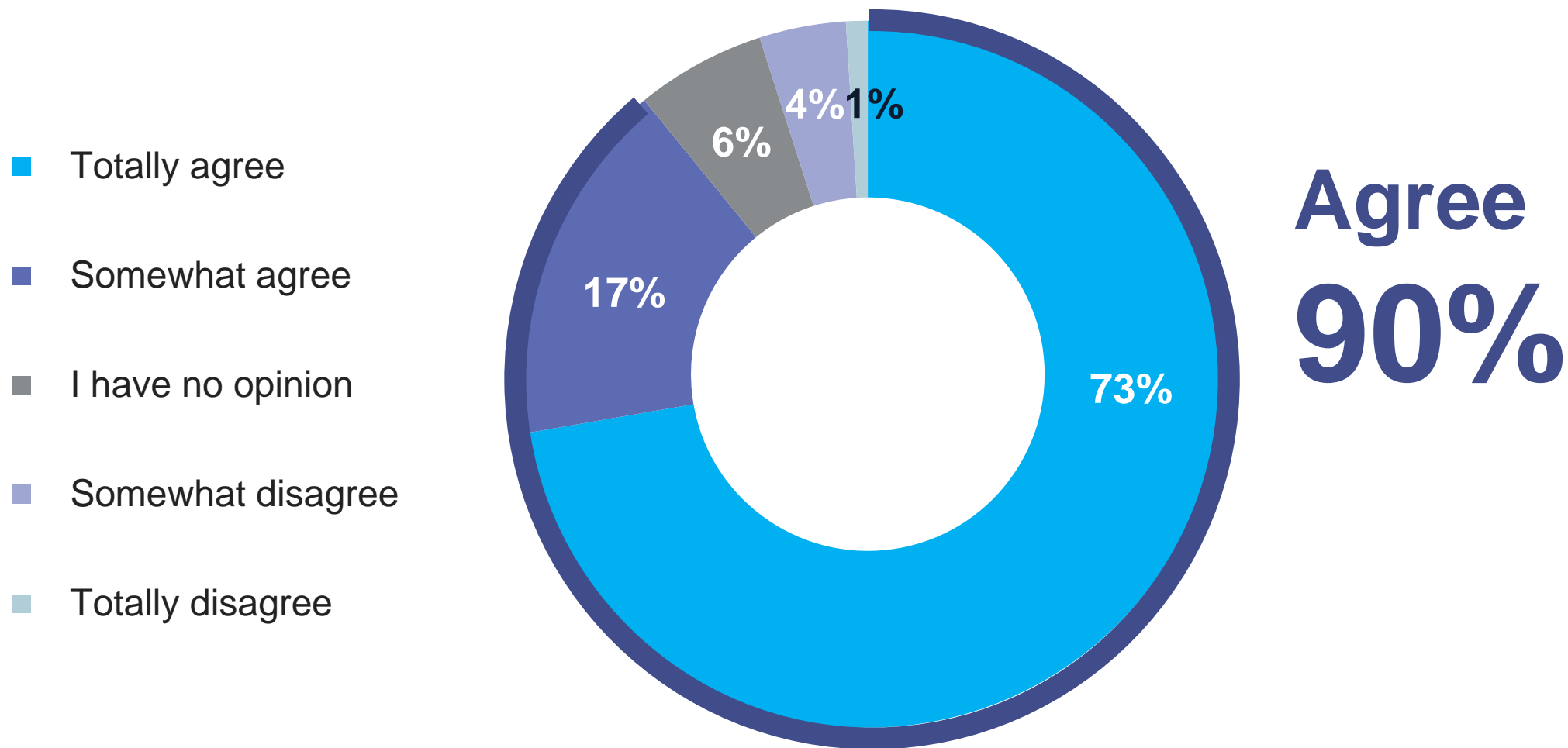


	TOTAL	REGION						GENDER		AGE			EDUCATION				HOUSEHOLD'S COMPOSITION	
		BC	AB	MB/SK	ON	QC	ATL	M	F	18-34	35-54	55+	<HS	HS	Post Sec	Univ. Grad	Kids	No kids
		A	B	C	D	E	F	G	H	K	L	M	N	O	P	Q	R	S
Base	1000	136	112	65	384	235	68	486	514	273	340	387	87	367	392	154	246	754
NET: AFFECT	61%	54%	62%	53%	61%	65%_A	65%	64%	59%	58%	65%	60%	53%	61%	64%	58%	67%_s	59%
It will affect it a lot	24%	24%	28%	18%	22%	26%	24%	28%_H	20%	19%	23%	28%_K	21%	23%	25%	25%	25%	23%
It will affect it a little	37%	30%	34%	35%	39%	39%	41%	36%	39%	39%	42%_M	32%	32%	38%	39%	33%	42%	36%
It won't affect it much	25%	28%	18%	29%	24%	25%	29%	22%	27%	30%_M	24%	22%	31%	24%	24%	26%	25%	25%
It won't affect it at all	14%	19%_{EF}	20%_{EF}	18%_F	14%	9%	6%	14%	14%	12%	11%	18%_L	17%	14%	13%	17%	8%	16%_R



Base: All respondents (n=1000)
 Q3. To what extent will the federal government's ability to protect the interests of Canada's dairy industry in the NAFTA renegotiation with the United States affect your vote in the upcoming election?

Should products coming into Canada be subjected to the same standards as Canadian dairy products?



Should products coming into Canada be subjected to the same standards as Canadian dairy products?



	TOTAL	REGION						GENDER		AGE			EDUCATION				HOUSEHOLD'S COMPOSITION	
		BC	AB	MB/SK	ON	QC	ATL	M	F	18-34	35-54	55+	<HS	HS	Post Sec	Univ. Grad	Kids	No kids
		A	B	C	D	E	F	G	H	K	L	M	N	O	P	Q	R	S
Base	1000	136	112	65	384	235	68	486	514	273	340	387	87	367	392	154	246	754
NET: AGREE	90%	92%	88%	90%	89%	89%	91%	89%	90%	83%	87%	97% _{KL}	82%	87%	93% _{NO}	93% _{NO}	86%	91% _R
Totally agree	73%	79%	66%	71%	72%	76%	72%	68%	78% _G	57%	74% _K	84% _{KL}	68%	69%	78% _O	74%	68%	75%
Somewhat agree	17%	13%	23%	19%	17%	13%	19%	21% _H	13%	26% _{LM}	13%	13%	14%	18%	15%	19%	17%	16%
Somewhat disagree	4%	-	7% _A	4% _A	3%	5% _A	5% _A	5%	3%	7% _M	4%	1%	2%	7% _P	2%	3%	6% _S	3%
Totally disagree	1%	-	-	1%	1%	1%	-	1%	-	1%	-	-	-	1%	-	1%	1%	-
I have no opinion	6%	8%	5%	6%	7%	5%	4%	5%	7%	9% _M	9% _M	2%	16% _{OPQ}	6%	5%	3%	7%	6%

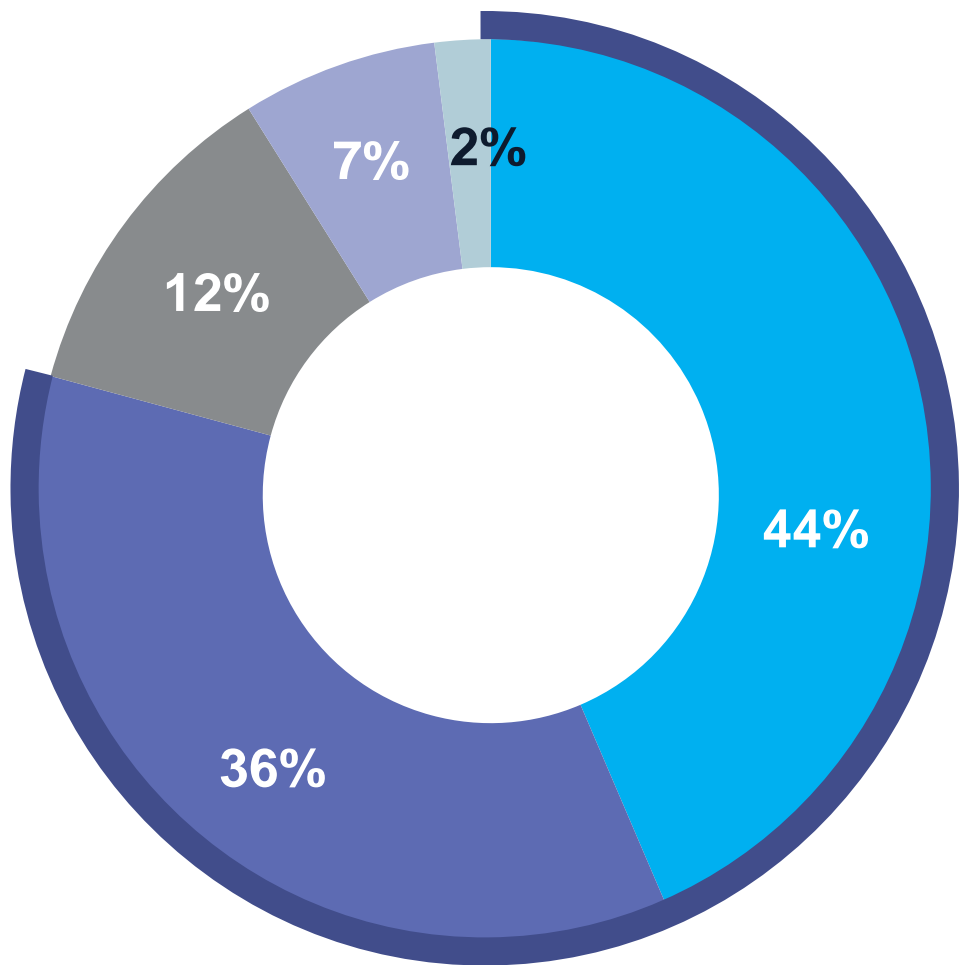


Base: All respondents (n=1000)

Q4. Do you believe that U.S. dairy products coming into Canada should be subject to the same standards, including those on quality (e.g. ban on growth hormones, environmental standards, animal health), as Canadian dairy products and that this should be part of the terms of the new NAFTA agreements?

Propensity to share Canadian dairy farmers' concerns regarding the NAFTA renegotiations

- I fully share their concerns
- I partially share their concerns
- I have no opinion
- I partially disagree with these concerns
- I completely disagree with these concerns



**80%
Share
Canadian
dairy farmers'
concerns**

Propensity to share Canadian dairy farmers' concerns regarding the NAFTA renegotiations



	TOTAL	REGION						GENDER		AGE			EDUCATION				HOUSEHOLD'S COMPOSITION	
		BC	AB	MB/SK	ON	QC	ATL	M	F	18-34	35-54	55+	<HS	HS	Post Sec	Univ. Grad	Kids	No kids
		A	B	C	D	E	F	G	H	K	L	M	N	O	P	Q	R	S
Base	1000	136	112	65	384	235	68	486	514	273	340	387	87	367	392	154	246	754
NET: CONCERN	80%	80%	77%	82%	79%	78%	83%	79%	79%	67%	80%_K	86%_{KL}	66%	78%_N	83%_N	80%_N	78%	79%
I fully share their concerns	44%	37%	40%	45%	41%	52%_{AD}	47%	42%	45%	24%	44%_K	56%_{KL}	45%	42%	47%_Q	37%	38%	45%
I partially share their concerns	36%	43%_E	37%	37%	38%_E	26%	36%	37%	34%	43%_M	36%	30%	21%	36%_N	36%_N	43%_{NP}	40%	34%
I partially disagree with these concerns	7%	4%	9%	10%	5%	9%	8%	9%_H	5%	13%_{LM}	6%	4%	6%	9%	6%	7%	7%	7%
I completely disagree with these concerns	2%	1%	2%	1%	2%	2%	-	3%_H	1%	2%	1%	3%	-	1%	2%	4%_O	2%	2%
I have no opinion	12%	14%	11%	8%	14%	11%	9%	9%	15%_G	18%_M	13%_M	7%	29%_{OPQ}	12%	9%	9%	14%	11%








Base: All respondents (n=1000)
 Q5. Canadian dairy farmers are concerned that the NAFTA renegotiations with the United States and Mexico may result in concessions that could endanger Canadian dairy production. To what extent do you share the concerns of producers?



PROFILE OF RESPONDENTS

Profile of respondents

	n= 1000	
	Total	
	Gender	
	Men	49%
	Women	51%
	Generation	
	18-34	27%
	35-54	34%
	55+	39%
	Avg.	48
	Income	
	<\$50,000	41%
	\$50,000+	47%
	No answer	12%

n= 1000	
Total	
	
Education	
<HS	9%
HS	37%
Post Sec	39%
Univ. Grad	15%
	
Market	
Alberta	11%
British Columbia	14%
Ontario	38%
Quebec	24%
Prairies	6%
Atlantics	7%

Contact Ipsos:

Sébastien Dallaire

Vice President, Ipsos Public Affairs

Sebastien.Dallaire@ipsos.com

(514)-904-4324