

Canadian Attitudes to the Defence Industry

January 31, 2024



Methodology

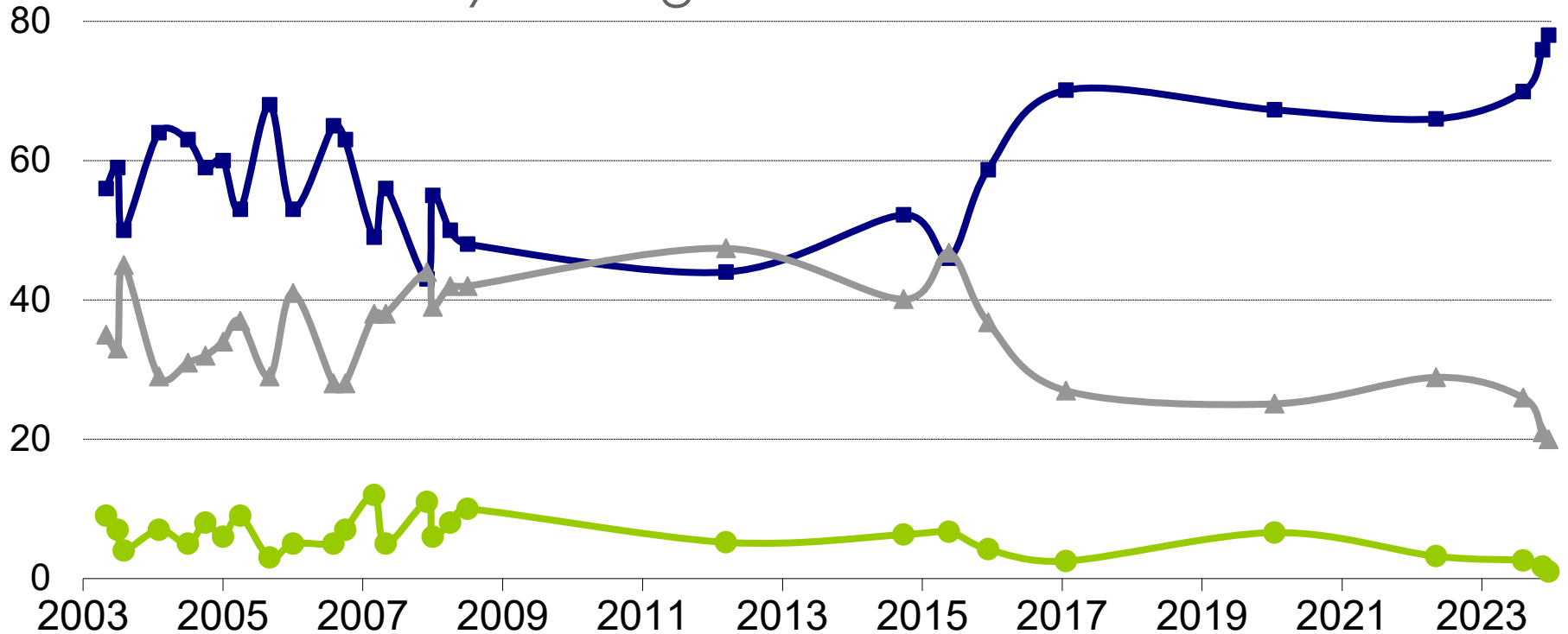
- » This study was conducted online using EKOS' probability-based research panel, *Probit*
- » The field dates for this survey are December 6-15, 2023
- » In total, a random sample of 2,608 Canadian adults aged 18+ responded to the survey
- » The margin of error associated with the total sample is ± 1.9 percentage points, 19 times out of 20
- » All the data have been statistically weighted by age, gender, and region



- 1. Gauging the Public Mood**
- 2. Perceptions and importance of Canada's Defence Industry**
- 3. Defence Spending and Procurement**
- 4. Canada's Reputation Abroad**
- 5. International Relations: U.S, AUKUS, Military Exports, Ukraine**
- 6. Cyber Threats**
- 7. Conclusions**

1. Gauging the public mood

Q. From your own point of view, do you feel that, overall, the world is safer, more dangerous, or about the same as it was five years ago?



■ More dangerous

▲ About the same

● Safer

2. Perceptions of Canada's Defence Industry

Q. How familiar are you with each of the following industries?

The oil and gas industry



The automobile industry



The high-tech industry



The mining industry



The defence industry



The commercial aerospace industry



DK/NR
 Not at all familiar
 Not very familiar
 Somewhat familiar
 Extremely familiar

2. Perceptions of Canada's defence industry

Q. *Would you say that your attitudes towards Canada's defence industry are...?*

December 2023



BASE: Canadians; December 6-15, 2023, n=2,608, MOE +/- 1.9%, 19 times out of 20

November 2017



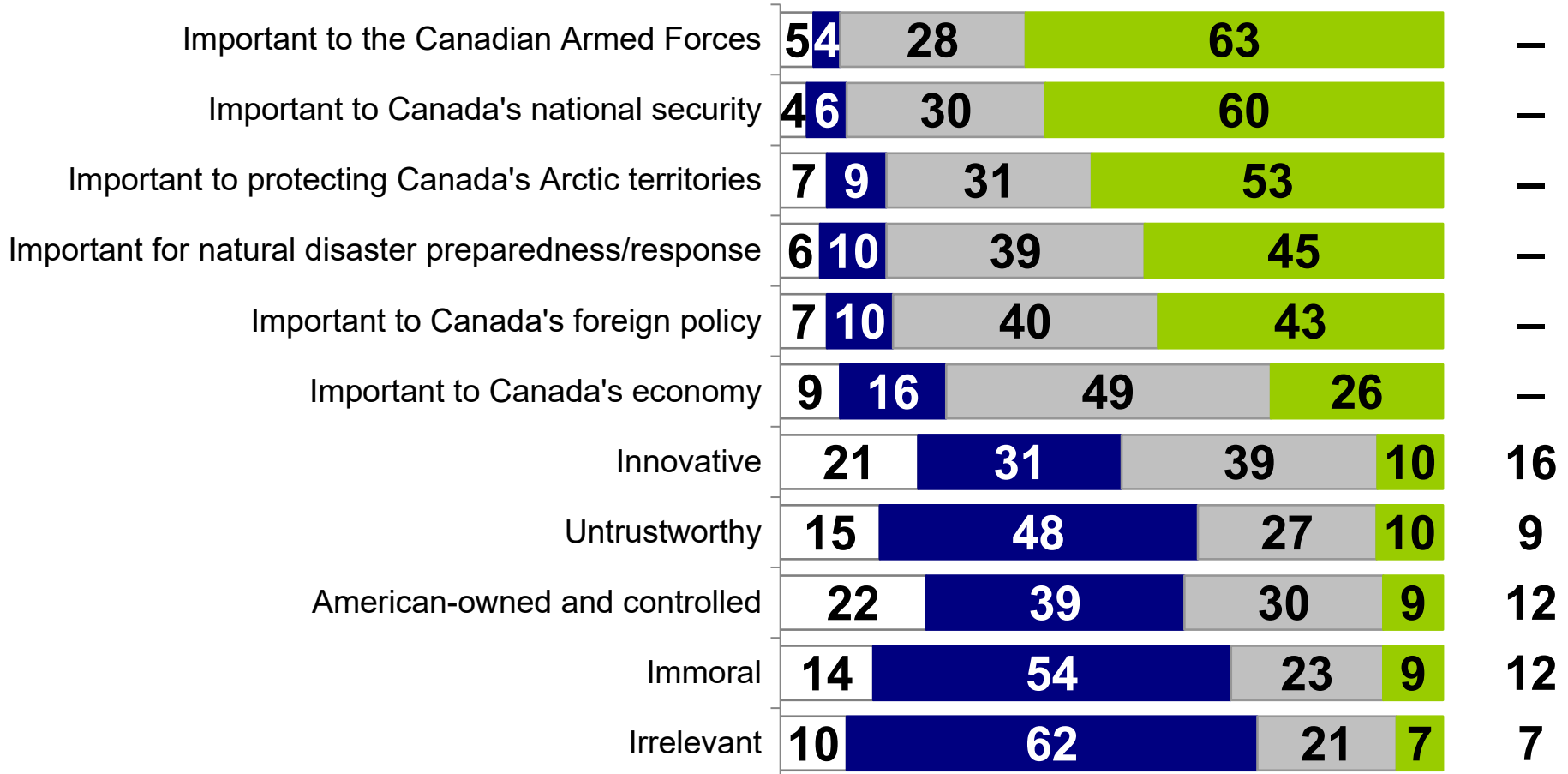
BASE: Canadians; October 24 and November 3, 2017, n=2,537, MOE +/- 1.9%, 19 times out of 20

- DK/NR
- Very negative
- Somewhat negative
- Somewhat positive
- Very positive

2. Perceptions of Canada's defence industry

Q. Please indicate whether you think each of the following terms describes Canada's defence industry completely, describes it somewhat or doesn't describe it at all

2017
% describes completely



□ DK/NR ■ Does not describe at all ■ Describes somewhat ■ Describes completely

2. Importance of key Canadian industries

Q. When it comes to Canada's economy and jobs, how important do you think each of the following industries are?

The oil and gas industry



The automobile industry



The high-tech industry



The mining industry



The defence industry



The commercial aerospace industry



DK/NR
 Not at all important
 Not very important
 Somewhat important
 Extremely important

2. Domestic importance of defence industry

Q. Please indicate whether you agree or disagree with each of the following statements:

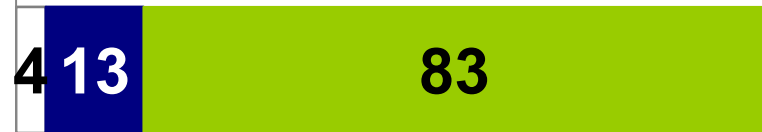
For national security reasons, some defence technologies and services should be produced in Canada, for Canada



Innovations in defence technology can benefit the rest of the economy



It is important that Canada has a strong and successful defence industry



Canada should have a defence industry that is independent from the United States



Canada can buy any defence equipment or technology it needs from companies in allied nations like the U.S. or Britain



Canada produces world-leading defence products and services



DK/NR Somewhat/Strongly disagree Somewhat/Strongly agree

2. Tracking domestic importance

Q. Please indicate whether you agree or disagree with each of the following statements:

It is important that Canada has a strong and successful defence industry

December 2023



BASE: Canadians; December 6-15, 2023, n=2,608, MOE +/- 1.9%, 19 times out of 20

November 2017



BASE: Canadians; October 24 and November 3, 2017, n=2,537, MOE +/- 1.9%, 19 times out of 20

- DK/NR
- Strongly disagree
- Somewhat disagree
- Somewhat agree
- Strongly agree

2. Domestic importance of defence industry

Q. Please indicate whether you agree or disagree with each of the following statements:

The growth and health of Canada's defence industry should be an important part of any kind of defence review or refreshed policy



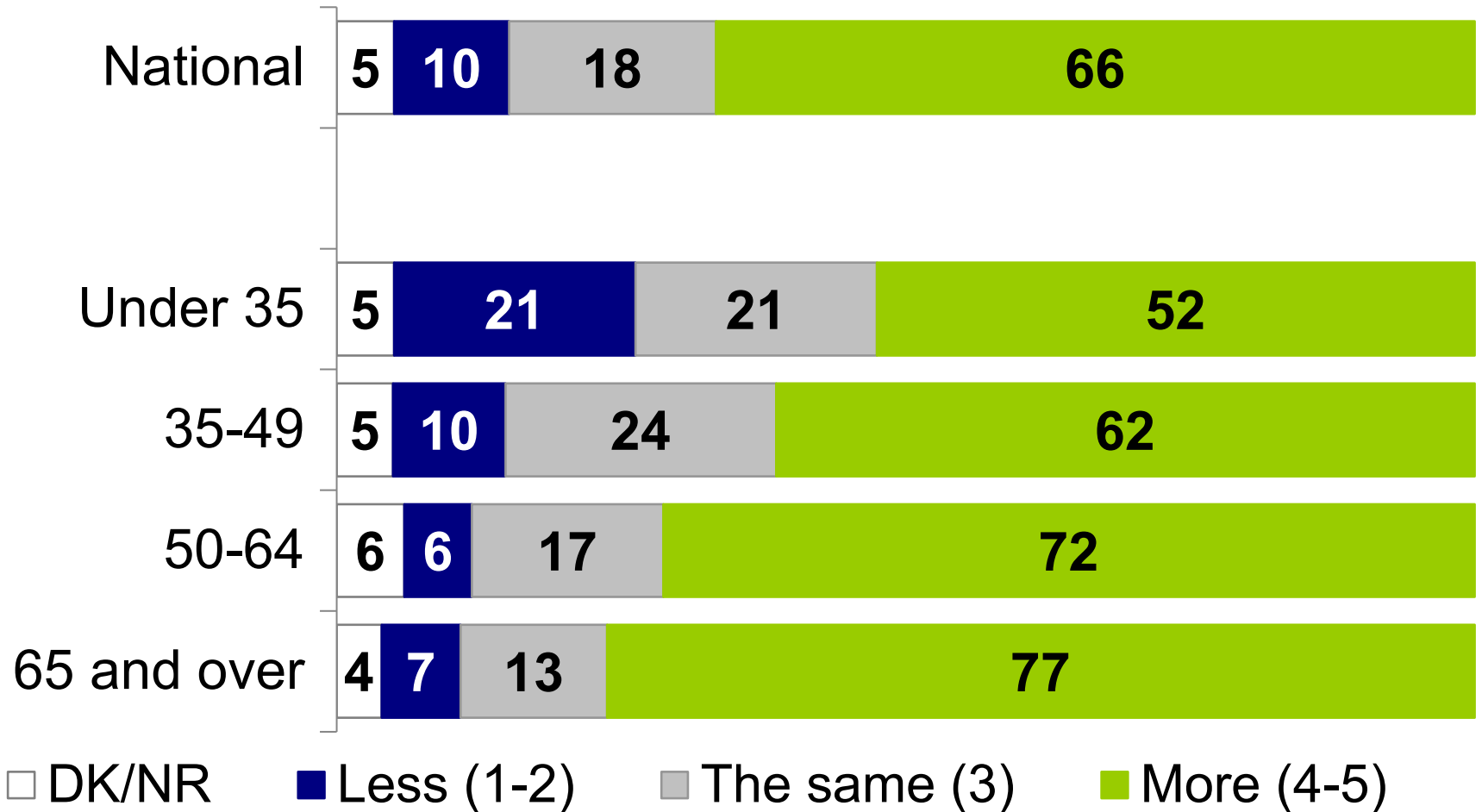
The growth and health of Canada's defence industry should be a priority for the Canadian government



DK/NR Disagree (1-2) Agree (3-4)

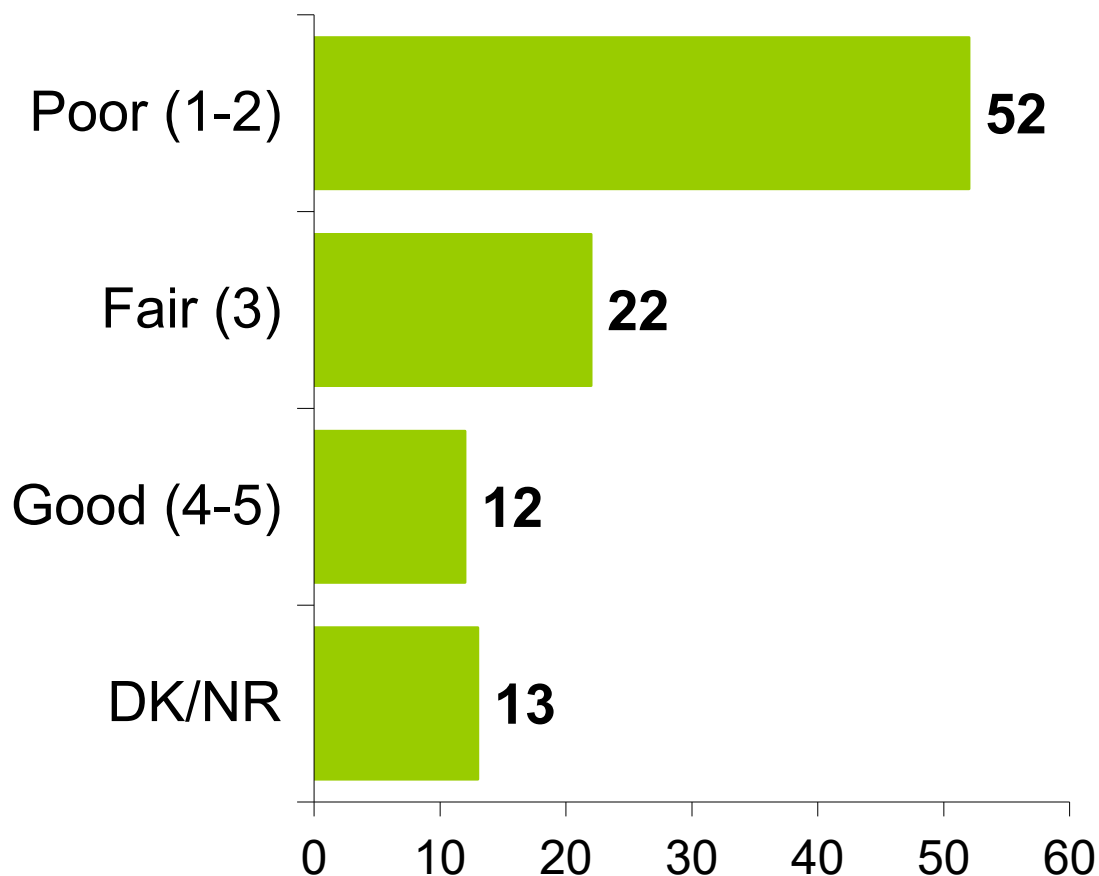
3. Attitudes to Canadian defence spending

Q. All things considered, do you believe Canada should be spending more, less, or about the same amount as it is now when it comes to national defence?



3. Approval of GoC defence procurement

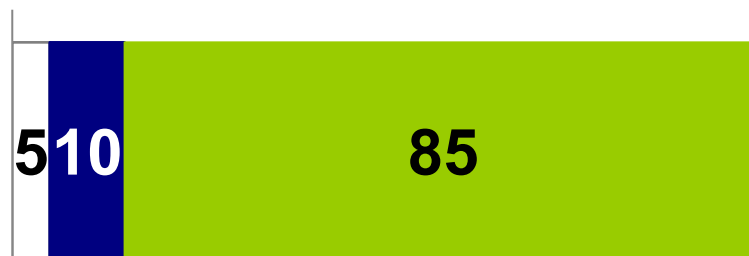
Q. How well do you think the Government of Canada does when it comes to acquiring the necessary equipment for Canada's national defence and security needs?



3. Attitudes towards military procurement

Q. Please indicate whether you agree or disagree with each of the following statements:

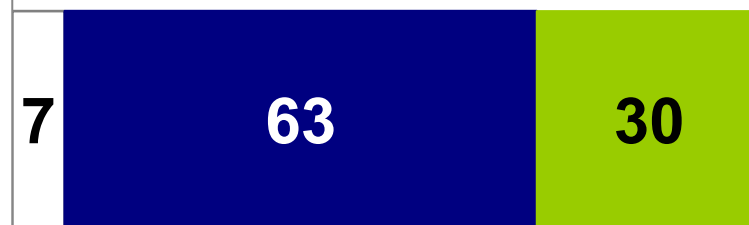
Whenever possible, the Canadian government should preference and buy Canadian-made defence equipment and services



Given the state of the world, Canada should increase its stockpiles of defence equipment



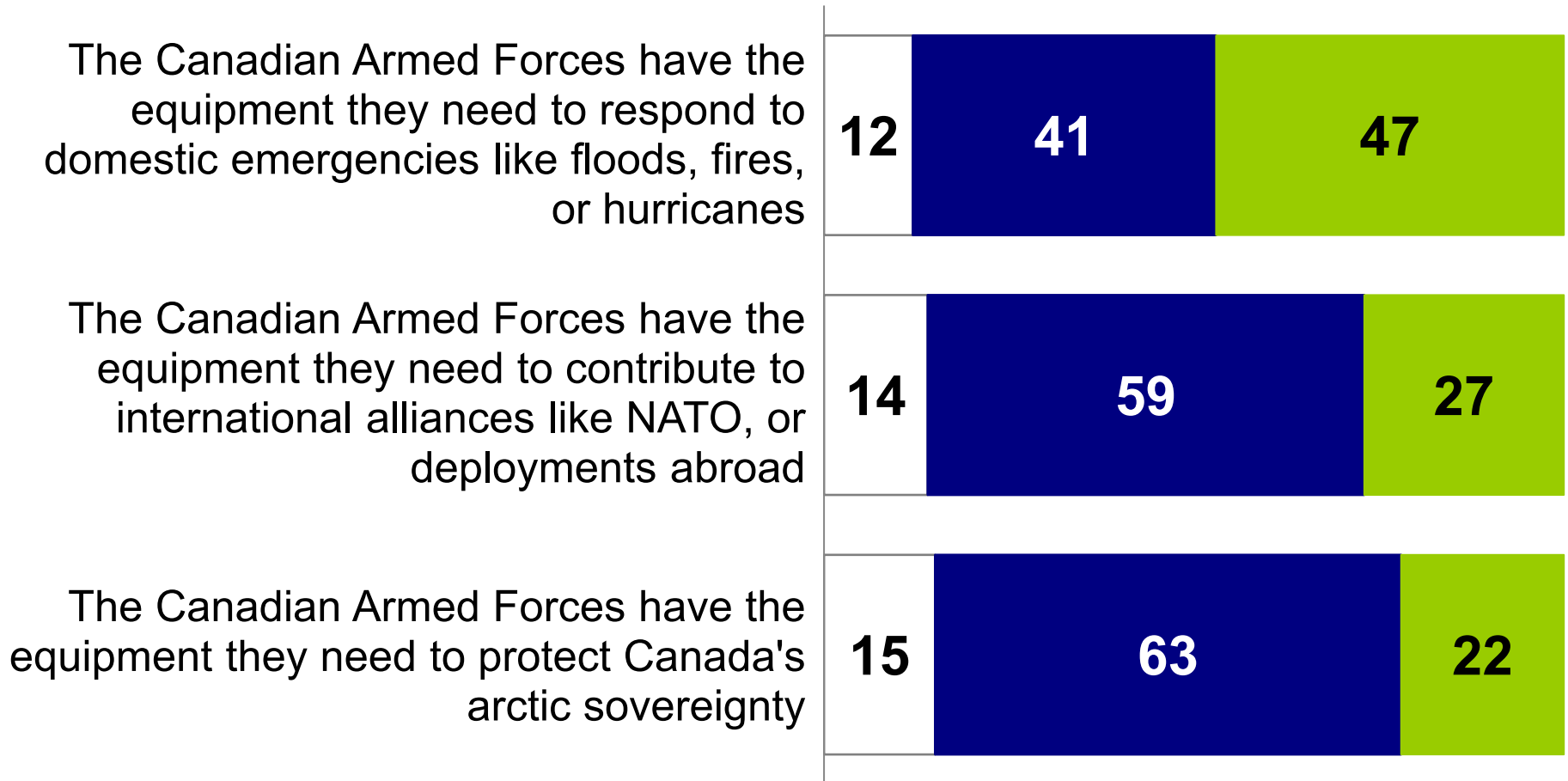
When buying military equipment, cost should be the primary consideration, not where something was made



□ DK/NR ■ Somewhat/Strongly disagree ■ Somewhat/Strongly agree

3. Perceived adequacy of CAF equipment

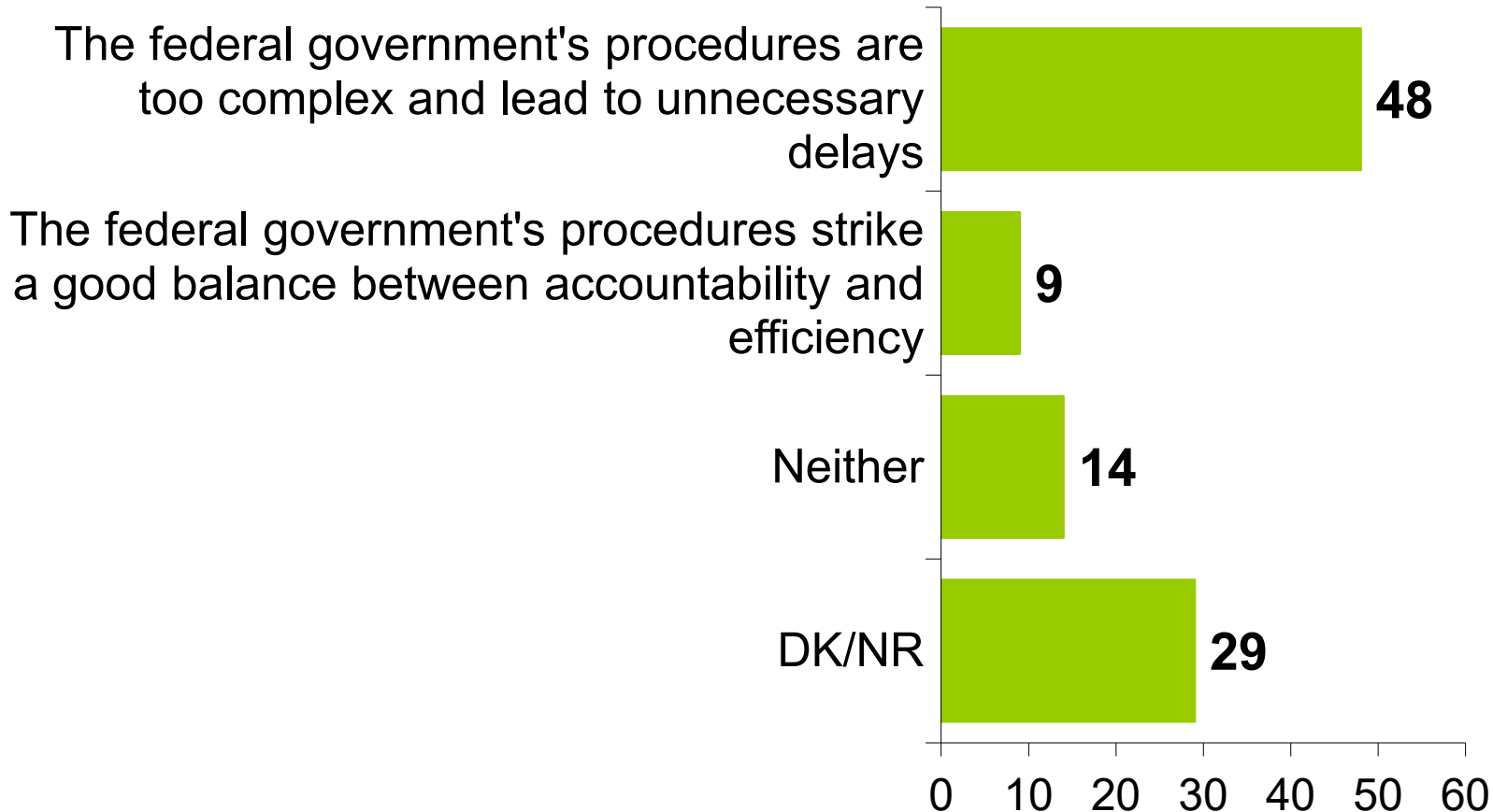
Q. Please indicate whether you agree or disagree with each of the following statements:



DK/NR Somewhat/Strongly disagree Somewhat/Strongly agree

3. Complexity of procurement procedures

Q. *When it comes to the federal government's process for acquiring equipment for Canada's national defence and security needs, which of the following statements comes closest to your own point of view?*



4. Perceptions of Canada's defence role

Q. Please indicate whether you agree or disagree with each of the following statements:

Canada has a critical role to play in the defence of the Arctic



Canada has a critical role to play in the defence of North America



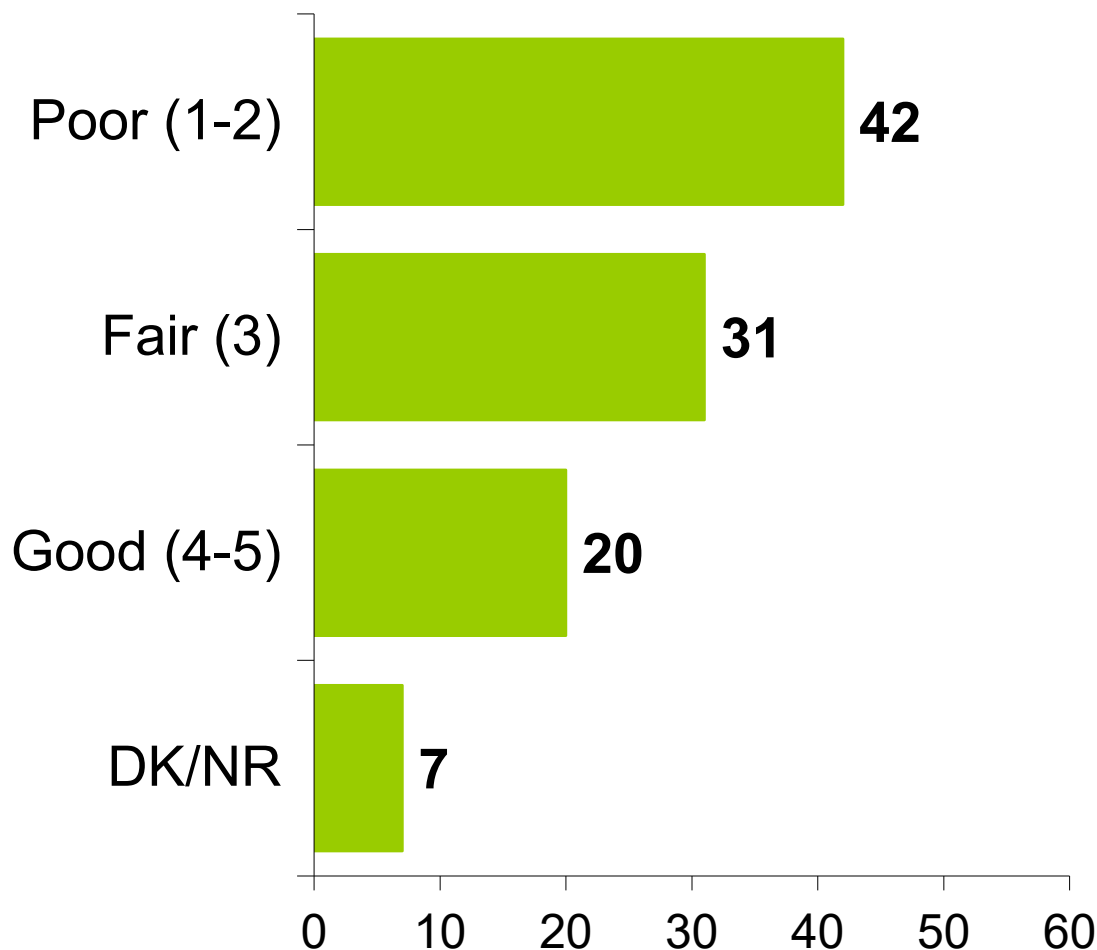
DK/NR

Disagree (1-2)

Agree (3-4)

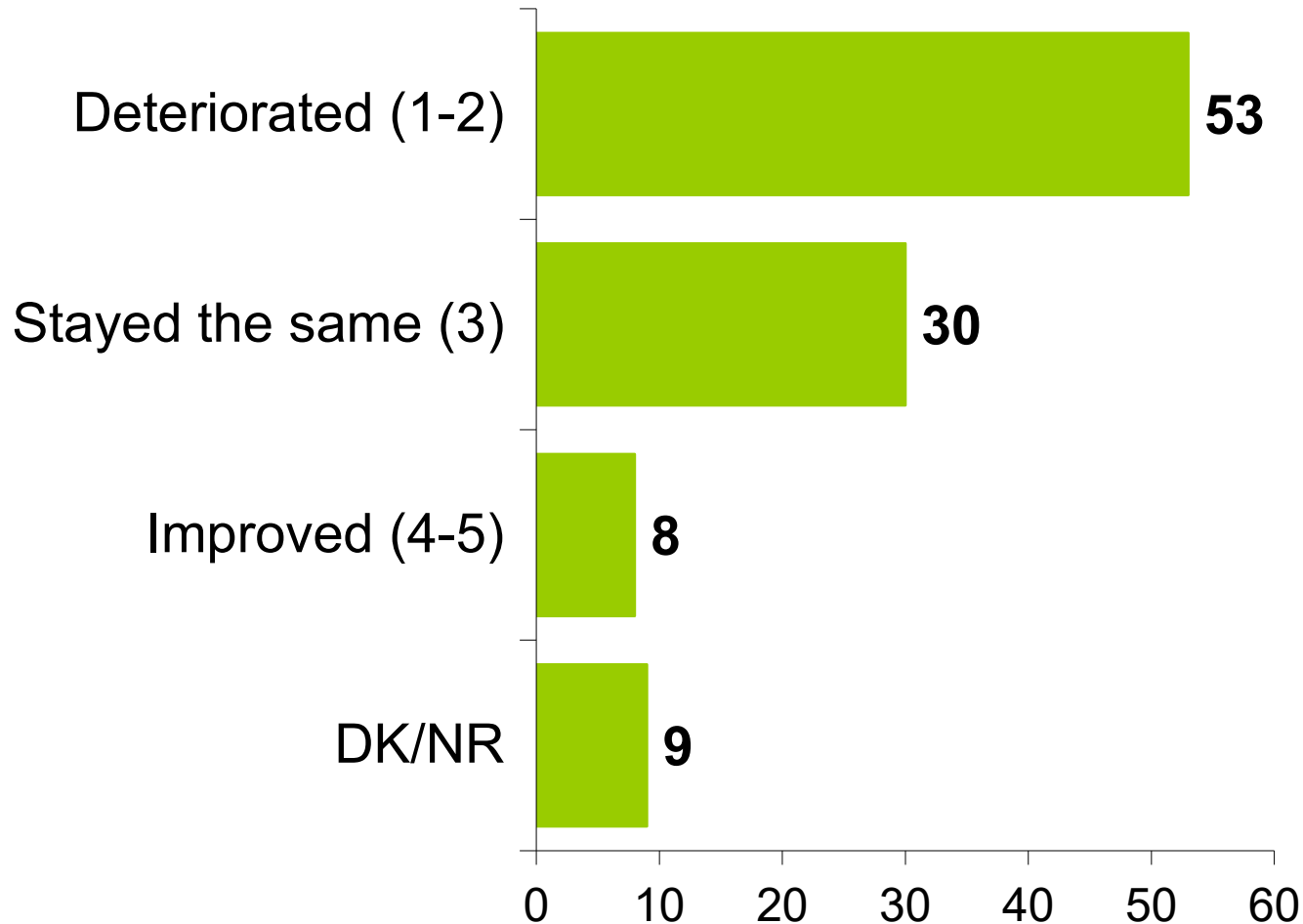
4. Canada's reputation abroad

Q. *Would you say that our closest allies consider Canada's international reputation when it comes to defence to be...?*



4. Perceived trend in Canada's reputation

Q. *And would you say Canada's international reputation when it comes to defence and security has improved or deteriorated over the past five years?*



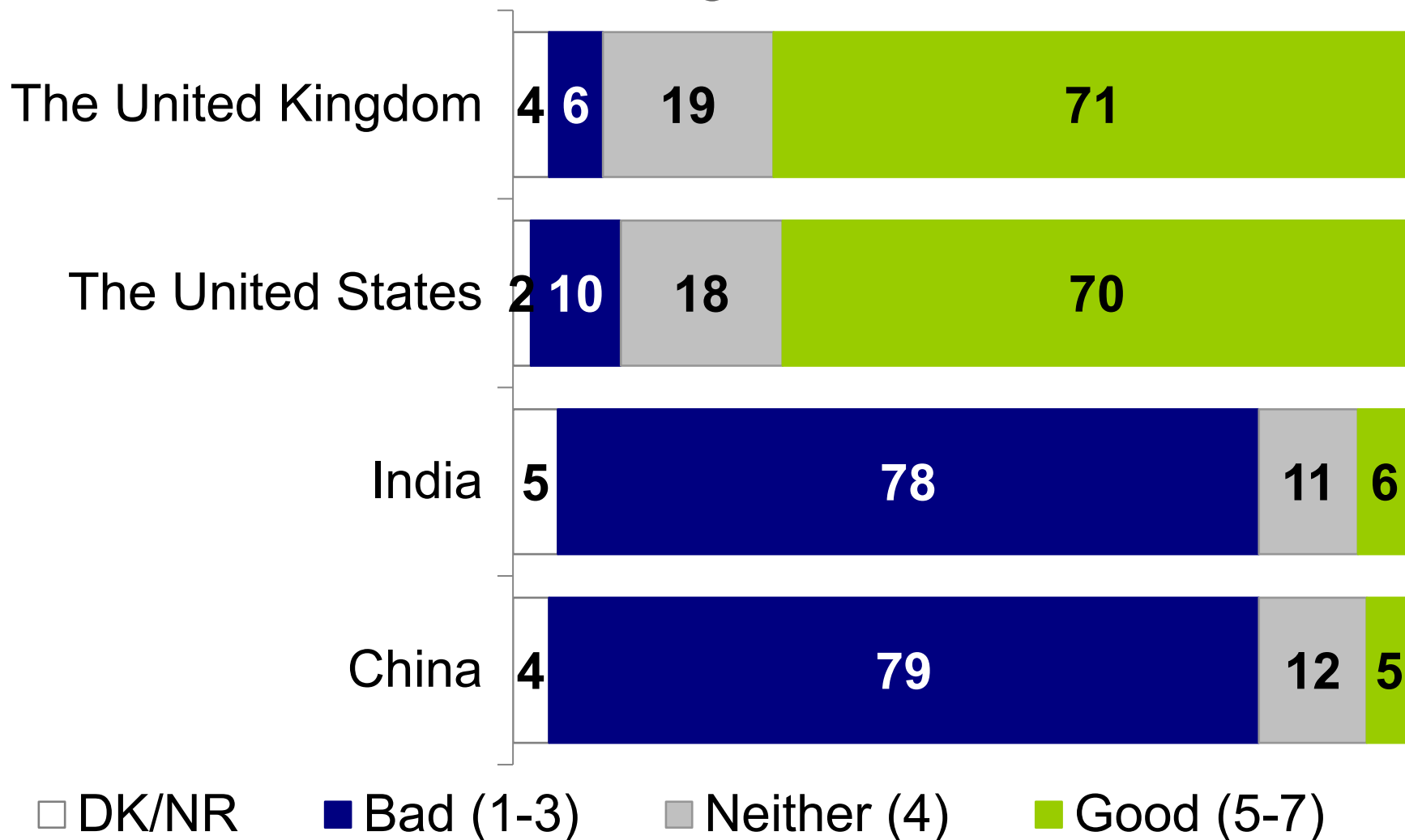
4. Attitudes to Canada's reputation abroad

Q. Please indicate whether you agree or disagree with each of the following statements:



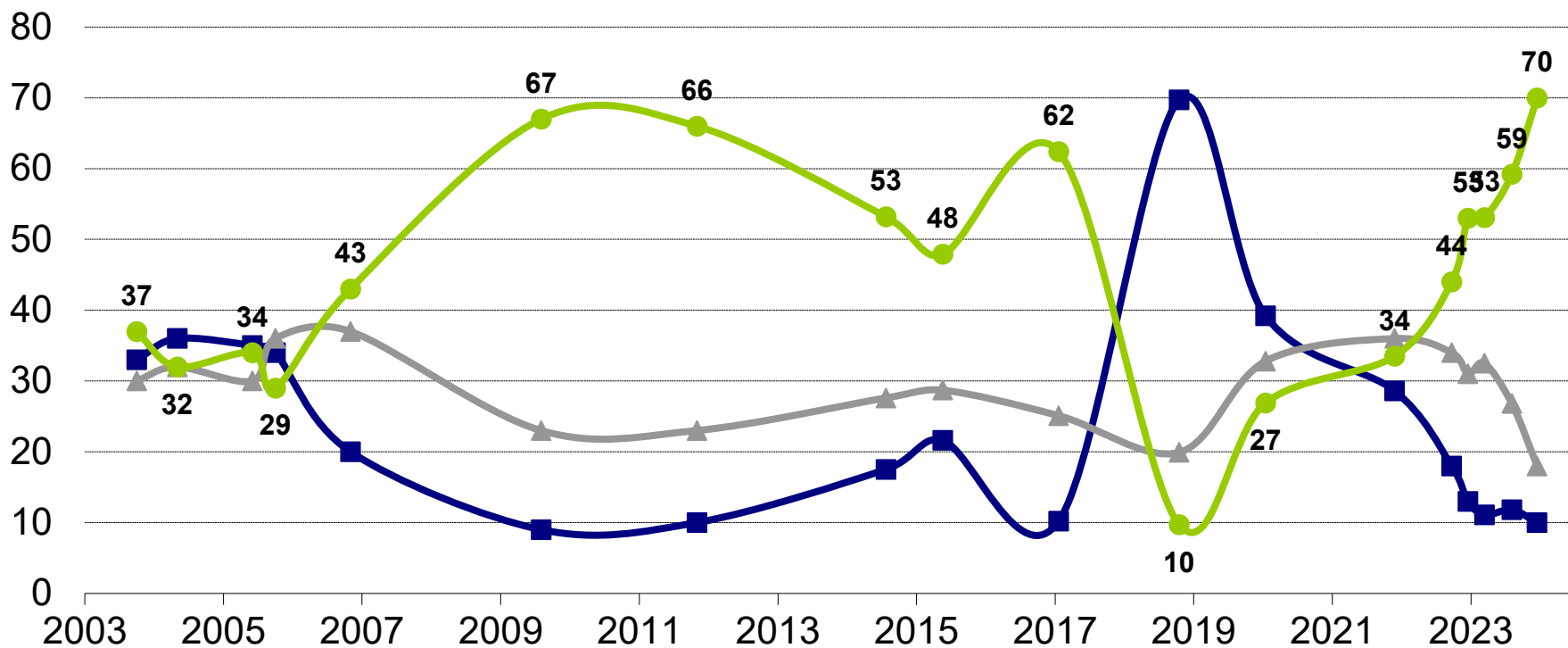
5. Perceived state of international relations

Q. How would you currently describe relations between Canada and the following countries?



5. Tracking state of Canada-U.S. relations

Q. How would you currently describe relations between Canada and the United States?



■ Bad (1-3)

▲ Neither (4)

● Good (5-7)

5. Attitudes to military equipment exports

Q. Please indicate whether you agree or disagree with each of the following statements:

Canada has an important role to play in supplying Ukraine with Canadian-made military equipment and support



The Canadian government has a role in promoting the sale of Canadian defence products and services internationally



The Canadian government can be trusted to properly monitor and regulate the export of Canadian military goods and services abroad



Canada should not be in the business of selling military equipment abroad

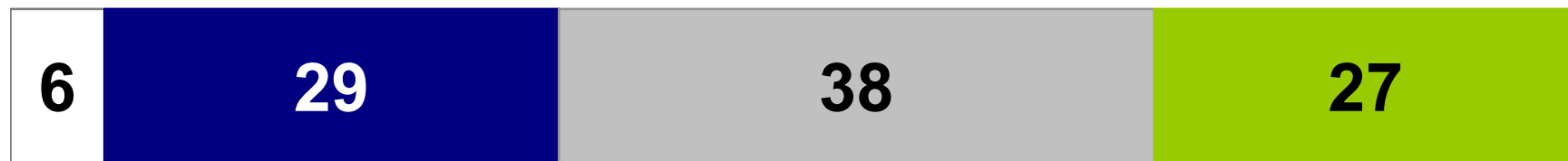


DK/NR Somewhat/Strongly disagree Somewhat/Strongly agree

5. Adequacy of Canadian aid to Ukraine

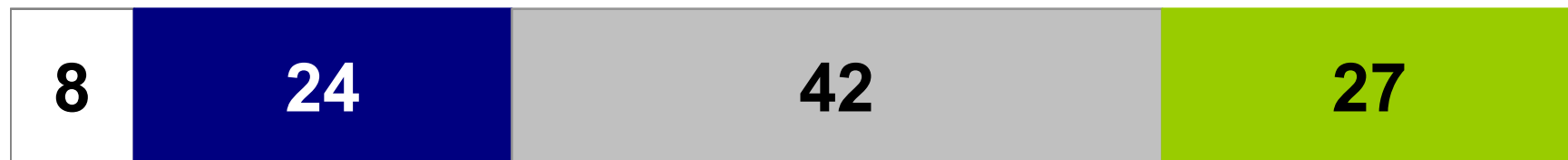
Q. Do you believe the Government of Canada has done too much, too little, or just the right amount to support Ukraine in its conflict with Russia?

December 2023



BASE: Canadians; December 6-15, 2023, n=2,608, MOE +/- 1.9%, 19 times out of 20

November 2023



BASE: Canadians; November 3-13, 2023, n=1,060, MOE +/- 3.0%, 19 times out of 20

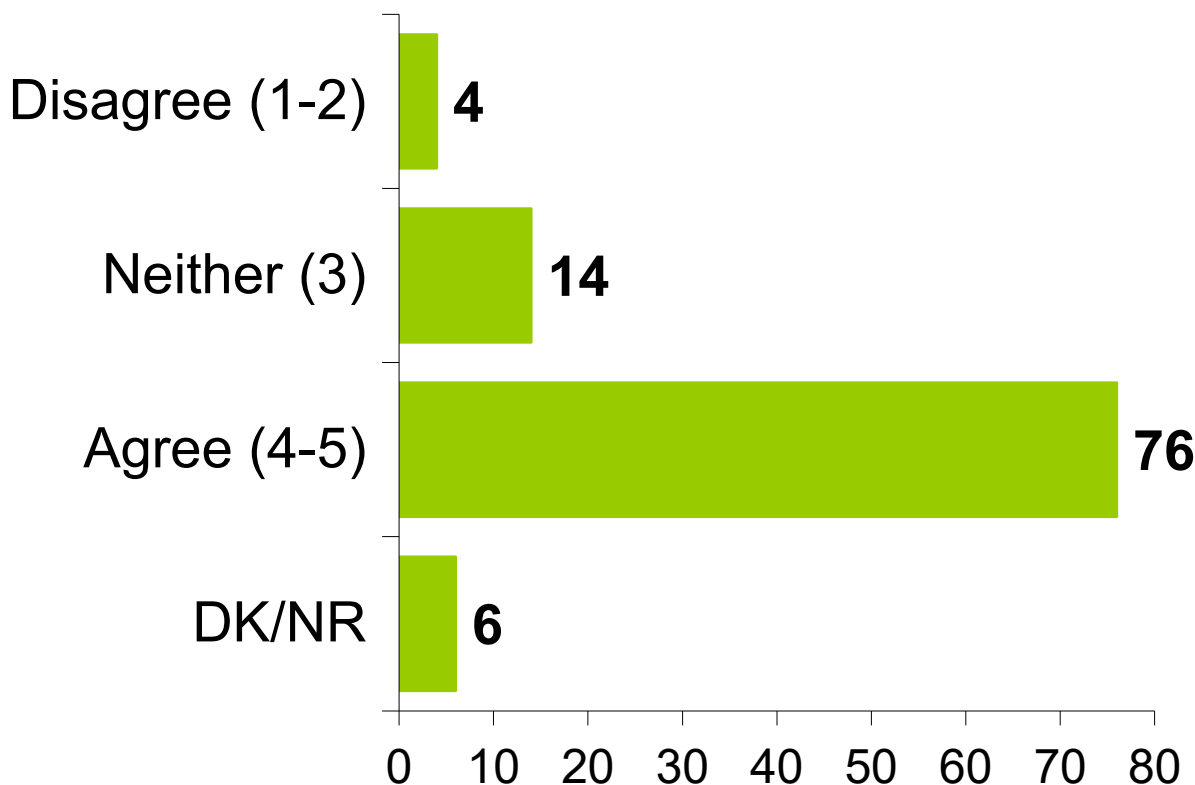
DK/NR

Too little (1-2)

5. Attitudes to AUKUS relations

Q. Please indicate whether you agree or disagree with the following statement:

When it comes to national defence, Canada should have closer relationship with AUKUS countries, that is, Australia, the United Kingdom, and the United States



6. Attitudes to cyber threats

Q. Please indicate whether you agree or disagree with each of the following statements:

Cyber-attacks pose a significant threat to Canada's critical infrastructure



Cyber-attacks pose a significant threat to the Canadian Armed Forces



Canada needs a sovereign Canadian cyber industry to defend itself against threats in cyberspace



The best way to prevent and defend against major cyber-attacks is for government and private industry to work closely together, including sharing sensitive information.



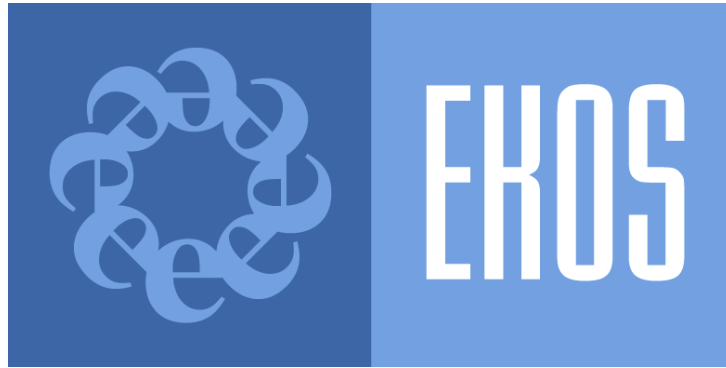
DK/NR Somewhat/Strongly disagree Somewhat/Strongly agree

7. Conclusions (i)

- » Public outlook on the defence industry shows some stable features, but also some major shifts. These are partly driven by a darker outlook on the world, linked to several key factors:
 - The pandemic laid bare the fragility of global supply chains. The ensuing rise in inflation and unaffordability has reshaped public priorities.
 - The country is seen as on the worst trajectory in decades of tracking and this outlook is being exacerbated by new forms of disinformation, including from foreign actors.
 - Wars in Ukraine and the Middle East have further reinforced these shifts in outlook.
- » Cyber security remains a huge concern. This suggests there is room for the industry to stake a bold, co-operative strategy to confront these threats.

7. Conclusions (ii)

- » While awareness of the industry has remained stable over the past six years, there have been significant rises in terms of its perceived importance.
- » There is a view that Canada's position on the world stage has eroded sharply and that our relatively poor performance is linked to problems with how our defence and security capabilities are responding to deepened challenges.
- » We have seen a sharp rise in the previous majority view that a “strong and successful” defence industry is critical in this context. Yet, the public judgement is that we are failing to provide a strong and successful defence industry.
- » Although a harder trade-off analysis suggests less enthusiasm, super majorities of Canadians think that increasing defence expenditures is a clear priority. Even on less favourable comparative testing to other higher priorities, there has been a clear rise in support for defence spending.



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