

# Canadians prefer united front with Mexico on NAFTA talks over a solo Canadian approach

National survey released August, 2017  
Project 2017-1049B



THE GLOBE AND MAIL 



NANOS  
SURVEY

# Summary

A strong plurality of Canadians believe that Canada will be able to negotiate a better outcome from the NAFTA negotiations if it forms a united front with Mexico. Similarly, Canadians are split in their agreement of whether Canada has a lot of leverage or bargaining power in the negotiations in order to protect Canadian interests. Canadians are split almost evenly in their confidence that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated, and they are overall noticeably less confident than they were earlier in 2017.

- **Nearly half of all Canadians are not confident or somewhat not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated** – When asked about their level of confidence that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated, 27 per cent of Canadians say that they are somewhat not confident while 22 per cent say they are not confident, compared to 16 per cent not confident and 21 per cent somewhat not confident during the February 2017 wave. Under half of Canadians say they are somewhat confident (33%) or confident (13%) that Canada can protect its economic interests if NAFTA is renegotiated (20 per cent confident and 39 per cent somewhat confident in February 2017). Five per cent are unsure.
- **One out of two Canadians agrees or somewhat agrees that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests** – When asked about their level of agreement that that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests, 37 per cent say that they somewhat agree while 13 per cent say they agree with the statement. Under half of Canadians say they somewhat disagree (30 per cent) or disagree (16 per cent) that Canada has a lot of bargaining power in potential NAFTA negotiations. Five per cent are unsure.
- **Canadians believe that Canada will be able to negotiate a better outcome from the NAFTA negotiations if it forms a united front with Mexico compared to a Canada only approach** – When asked which option will help Canada negotiate a better outcome from the NAFTA negotiations, 47 per cent of respondents say it is better if Canada forms a united front with Mexico to support and defend each other's interests. On the other hand, 37 per cent of Canadians believe that it is better for Canada to solely pursue its own interest. 16 per cent are unsure.

These observations are based on a Nanos RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, conducted between July 23<sup>rd</sup> and 26<sup>th</sup>, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

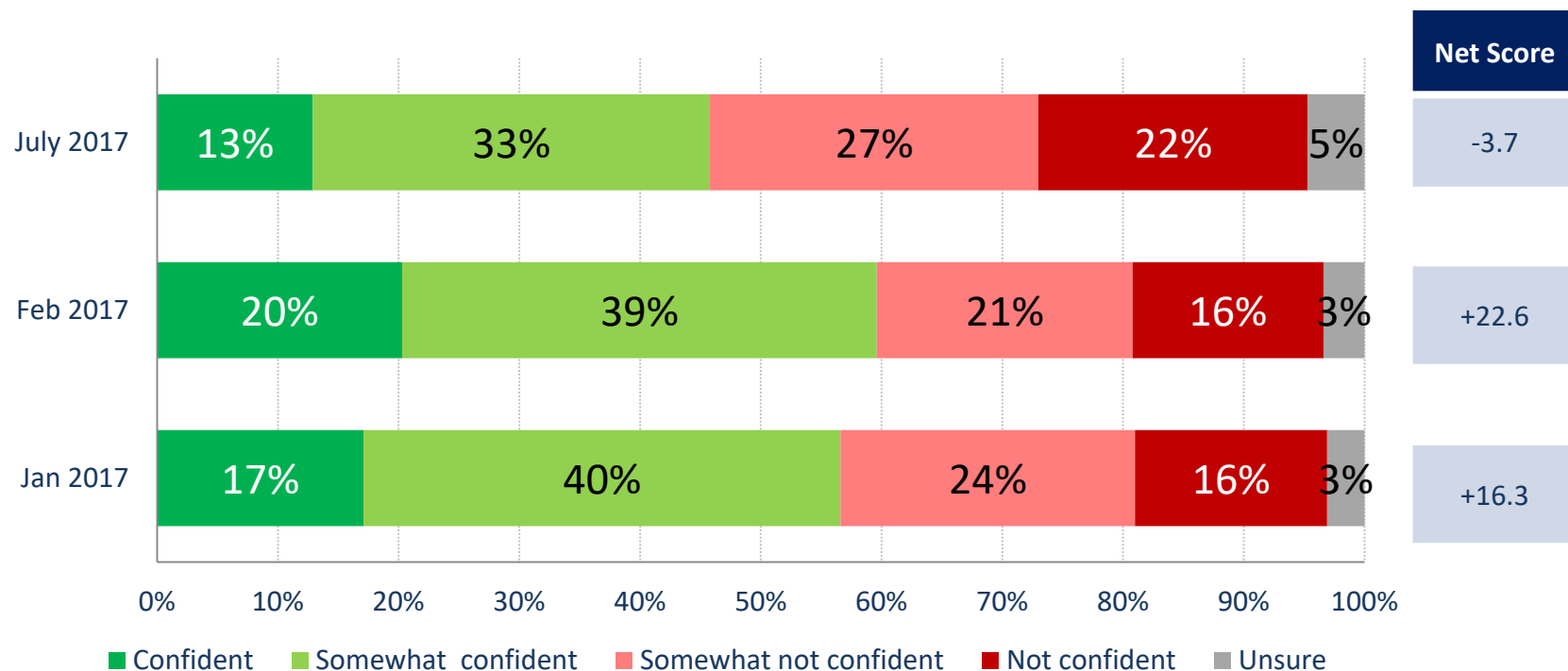


# Protecting Canada's economic interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23<sup>rd</sup> to 26<sup>th</sup>, 2017, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, February 25<sup>th</sup> to 28<sup>th</sup>, 2017, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 28<sup>th</sup> to February 1<sup>st</sup>, 2017, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



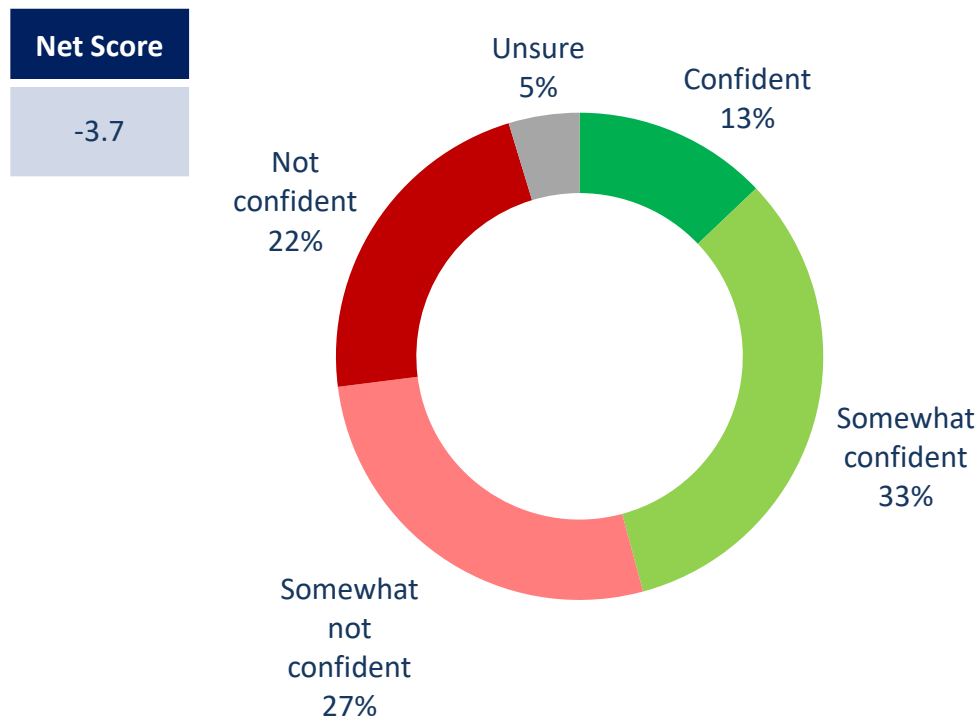
**\*Note: Charts may not add up to 100 due to rounding**

As you may have heard, the United States government recently released a list of objectives that shows how it wants to renegotiate NAFTA on terms more favourable for the U.S.

**QUESTION** – Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?

# Protecting Canada's economic interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23<sup>rd</sup> to 26<sup>th</sup>, 2017, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



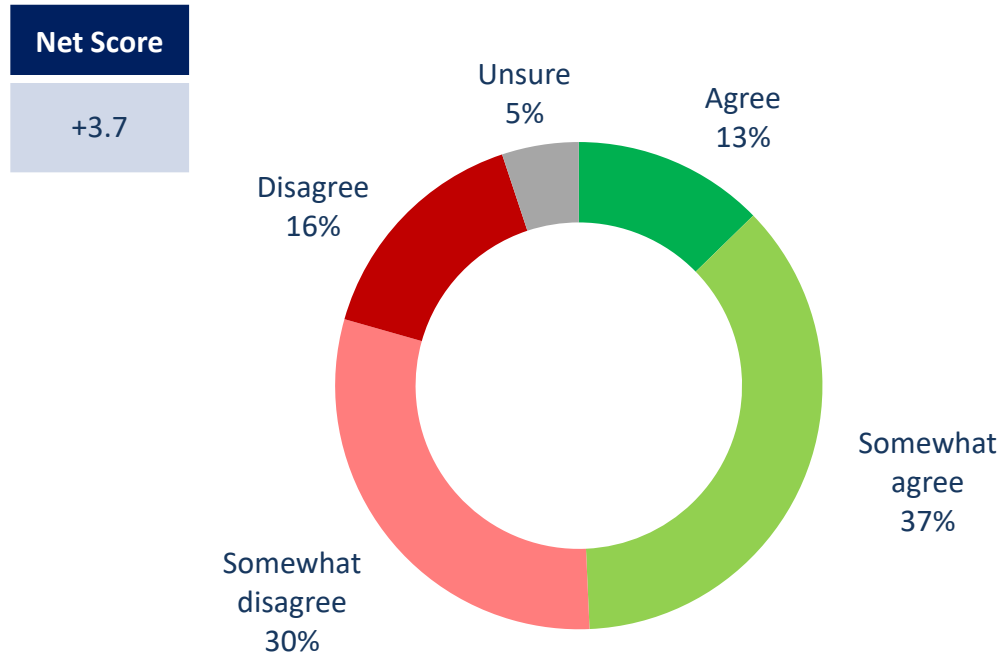
**\*Note:** Charts may not add up to 100 due to rounding

Subgroups	Not confident/ Somewhat not confident
Atlantic (n=100)	36.0%
Quebec (n=250)	53.3%
Ontario (n=300)	50.8%
Prairies (n=200)	50.1%
British Columbia (n=150)	49.0%
Male (n=511)	49.1%
Female (n=489)	50.1%
18 to 29 (n=163)	46.7%
30 to 39 (n=164)	53.9%
40 to 49 (n=195)	52.4%
50 to 59 (n=225)	50.4%
60 plus (n=253)	46.3%

**QUESTION** – Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?

# Bargaining power in negotiations to protect Canadian interests

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23<sup>rd</sup> to 26<sup>th</sup>, 2017, n=1000, accurate ±3.1 percentage points plus or minus, 19 times out of 20.



**\*Note:** Charts may not add up to 100 due to rounding

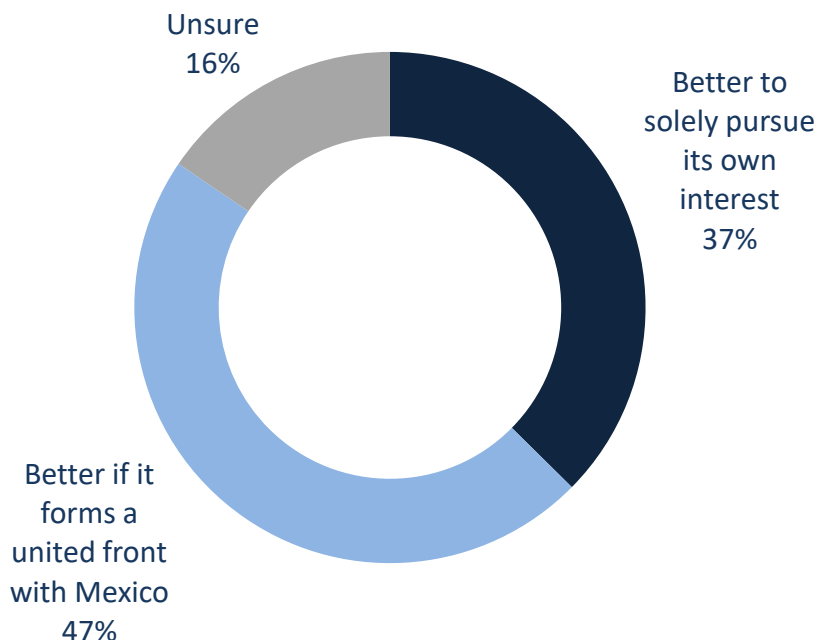
Subgroups	Agree/ Somewhat agree
Atlantic (n=100)	62.3%
Quebec (n=250)	46.4%
Ontario (n=300)	50.2%
Prairies (n=200)	44.4%
British Columbia (n=150)	50.3%
Male (n=511)	48.5%
Female (n=489)	50.1%
18 to 29 (n=163)	47.2%
30 to 39 (n=164)	48.4%
40 to 49 (n=195)	46.6%
50 to 59 (n=225)	49.3%
60 plus (n=253)	53.3%

**QUESTION** – Do you agree, somewhat agree, somewhat disagree or disagree that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests?



# Canada pursuing own interests or pursuing united front with Mexico in upcoming NAFTA negotiations

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, July 23<sup>rd</sup> to 26<sup>th</sup>, 2017, n=1000, accurate  $\pm 3.1$  percentage points plus or minus, 19 times out of 20.



**\*Note:** Charts may not add up to 100 due to rounding

Subgroups	United front
Atlantic (n=100)	48.2%
Quebec (n=250)	45.3%
Ontario (n=300)	44.7%
Prairies (n=200)	46.6%
British Columbia (n=150)	54.5%
Male (n=511)	46.0%
Female (n=489)	48.0%
18 to 29 (n=163)	51.0%
30 to 39 (n=164)	45.1%
40 to 49 (n=195)	48.6%
50 to 59 (n=225)	44.3%
60 plus (n=253)	46.2%

**QUESTION** – Will Canada will be able to negotiate a better outcome from the NAFTA negotiations if it solely pursues this country's self-interests or if it forms a united front with Mexico to support and defend each other's interests?



Methodology



# Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between July 23<sup>rd</sup> and 26<sup>th</sup>, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is  $\pm 3.1$  percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

Note: Charts may not add up to 100 due to rounding.



# Technical Note

Element	Description
Organization who commissioned the research	Globe and Mail
Final Sample Size	1,000 Randomly selected individuals.
Margin of Error	±3.1 percentage points, 19 times out of 20.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.
Demographics (Other)	Age, gender, education, income
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct
Number of Calls/	Maximum of five call backs.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.
Field Dates	July 23 <sup>rd</sup> to 26 <sup>th</sup> , 2017.
Language of Survey	The survey was conducted in both English and French.

Element	Description
Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line could not participate.
Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Estimated Response Rate	Sixteen percent, consistent with industry norms.
Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Question Content	This was module two of an omnibus survey. The previous module asked about the top national unprompted issue of concern.
Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Survey Company	Nanos Research
Contact	Contact Nanos Research for more information or with any concerns or questions. <a href="http://www.nanosresearch.com">http://www.nanosresearch.com</a> Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.



# About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



# Tabulations

### 2017-1049B – Globe and Mail/Nanos Survey – NAFTA Negotiations - STAT SHEET

As you may have heard, the United States government recently released a list of objectives that shows how it wants to renegotiate NAFTA on terms more favourable for the U.S.

			REGION						Gender		Age				
			Canada 2017-07	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Are you confident, somewhat confident, somewhat not confident or not confident that Canada can protect its economic interests if the North America Free Trade Agreement is renegotiated?	Total	Unwgt N	1000	100	250	300	200	150	511	489	163	164	195	225	253
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Confident	%	12.9	18.3	7.1	15.2	14.6	11.8	14.6	11.2	12.9	12.2	12.5	11.2	14.7
	Somewhat confident	%	32.9	37.3	35.8	30.9	29.4	34.0	33.6	32.3	32.0	29.7	31.5	35.1	35.0
	Somewhat not confident	%	27.2	17.2	34.3	23.4	25.3	32.3	27.1	27.4	23.2	29.2	26.5	27.6	29.2
	Not confident	%	22.3	18.8	19.0	27.4	24.8	16.7	22.0	22.7	23.5	24.7	25.9	22.8	17.1
	Unsure	%	4.7	8.3	3.8	3.1	5.9	5.2	2.7	6.5	8.4	4.2	3.6	3.3	4.0

			REGION						Gender		Age				
			Canada 2017-07	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Do you agree, somewhat agree, somewhat disagree or disagree that Canada has a lot of leverage or bargaining power in the negotiations to protect Canadian interests?	Total	Unwgt N	1000	100	250	300	200	150	511	489	163	164	195	225	253
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Agree	%	12.7	18.8	10.3	14.6	11.8	10.3	11.7	13.7	15.3	10.0	11.1	15.7	11.5
	Somewhat agree	%	36.6	43.5	36.1	35.6	32.6	40.0	36.8	36.4	31.9	38.4	35.5	33.6	41.8
	Somewhat disagree	%	30.1	26.1	35.2	23.1	35.3	31.5	32.4	27.9	34.3	29.3	29.8	28.5	28.9
	Disagree	%	15.5	10.3	15.6	20.7	12.7	12.4	15.5	15.6	11.8	15.6	21.9	17.8	12.1
	Unsure	%	5.1	1.3	2.9	6.0	7.7	5.7	3.5	6.5	6.8	6.6	1.7	4.3	5.7

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**2017-1049B – Globe and Mail/Nanos Survey – NAFTA Negotiations - STAT SHEET**

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			Canada 2017-07	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Will Canada be able to negotiate a better outcome from the NAFTA negotiations if it solely pursues this country's self-interests or if it forms a united front with Mexico to support and defend each other's interests?	Total	Unwgt N	1000	100	250	300	200	150	511	489	163	164	195	225	253
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Better to solely pursue its own interest	%	37.4	36.2	41.6	39.6	38.4	25.8	41.7	33.4	32.6	36.5	37.9	40.8	39.0
	Better if it forms a united front with Mexico	%	47.1	48.2	45.3	44.7	46.6	54.5	46.0	48.0	51.0	45.1	48.6	44.3	46.2
	Not sure	%	15.5	15.6	13.1	15.7	15.0	19.7	12.3	18.6	16.4	18.4	13.5	14.9	14.9

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