REPORT TO THE DEPARTMENT OF EXTERNAL AFFAIRS ON ATTITUDES TOWARD THE CANADA - U.S. FREE TRADE AGREEMENT

MAY 1988

#3009

Decima Research

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I. INTRODUCTION

Decima Research is pleased to present this report to the Department of External Affairs (DEA) on the results of the May 1988 nation-wide survey of Canadians' attitudes toward the Canada-U.S. Free Trade Agreement (FTA). The objective of this survey is to monitor the evolution of Canadian public opinion toward the FTA, since the deal was signed in January of this year. To facilitate the tracking analysis, reference is made throughout this report to the results of several previous surveys of Canadians' opinions on free trade, which were conducted for the Department by Decima Research.

The survey upon which this report is based was conducted May 7 to May 12 among a randomly selected sample of 1,500 Canadians drawn disproportionately to the national population. The sample was constructed in this manner so as to facilitate reliable analysis on a province-by-province basis.

Consequently, some of the provinces are "over-represented" in the total sample of 1,500 interviews. Nation-wide results for the Canadian population as a whole are reported on the basis of results for a proportionate, weighted sample of 857 cases. Results for a sample of this size are accurate to within ±3.3%, 95 out of 100 times.

This report is structured in a similar manner to those previously completed for the Department of External Affairs dealing with the free trade issue. The report begins with a discussion of Canadians' attentiveness to, understanding of and familiarity with the FTA. It continues with an analysis of levels of public support and opposition to the deal, followed by the perceived economic, political and independence effects of the deal, as well as the anticipated need for federal government assistance to business and individuals in order to facilitate change. Assessments of the federal government's management of the issue and perceptions of the various free trade opinion leaders are also explored.

Where applicable, regional differences in opinion regarding free trade issues are explored. Major socio-demographic differences in opinion are also summarized.

II. THE FTA — ATTENTIVENESS, UNDERSTANDING AND SUPPORT

A. Attentiveness to and Understanding of the FTA

Although the free trade deal has been at "centre stage" of the political theatre for a number of months now, the number of Canadians indicating they are closely following the discussions on the Agreement has declined since October 1987 (46% in May 1988 vs 56% in October 1987). As shown in Table 1, the current level of attentiveness to the free trade discussions is only slightly higher than that recorded in the summer of 1987.

Table 1

ATTENTIVENESS AND UNDERSTANDING OF THE FTA

	JUNE 1987 %	AUGUST 1987 %	OCTOBER 1987 %	MAY 1988 %
FOLLOW DISCUSSIONS ON FREE TRADE				
Closely	41	42	56	46
Not closely	59	59	43	53
UNDERSTAND THE ISSUE AS WELL AS YOU'D LIKE TO				
Yes	24	25	N/A	28
No	76	75	N/A	72

Also found in Table 1 is Canadians' reported level of understanding of the free trade issue. Despite the federal government's efforts to inform the public of the Agreement's contents and anticipated effects, the data show that there has not been any change over the past year in the number of Canadians who feel they understand the issue to their satisfaction. In fact, fewer than three-in-ten (28%) acknowledge that they understand the trade deal as well as they would like and views do not differ significantly across the various regions of the country.

B. Familiarity with the Contents of the Agreement

Reported levels of familiarity with the contents of the Free Trade Agreement is not high (Table 2). In fact, two-thirds (68%) say they are not familiar with what is contained within the Agreement. This number has remained relatively stable over the last six months, despite the wide media coverage given the issue.

Table 2

FAMILIARITY WITH THE CONTENTS OF THE CANADA-U.S. FREE TRADE AGREEMENT

* Key: I) Wave I Nov.12-19, 1987 II) Wave II Nov. 25-Dec. 4 1987 III) Wave III Dec. 8-16, 1987

	OCTOBER 1987 %	NOVEMBER/DECEMBER I %	II %	III %	MAY 1988 %
FAMILIARITY WITH WHAT IS CONTAINED IN AGREEMENT					
Very familiar	5	4	3	2	3
Familiar	31	31	28	28	28
Not familiar	52	53	55	55	51
Not familiar at all	11	12	14	14	17

* Key applies to all tables throughout the report.

Regional differences in levels of familiarity with the content of the FTA are evident. As found last winter, the May survey results show that residents of Quebec (33%) and British Columbia (36%) are among those expressing the most familiarity with what is contained in the FTA. On the other hand, Atlantic Canadians are among the least familiar with the contents of the Agreement (21%). Reported levels of familiarity in Ontario and the Prairies do not differ significantly from the national average.

Given the low level of reported familiarity with the contents of the FTA, it is not surprising to find that most Canadians (69%) disagree with the proposition, "The federal government has provided the Canadian people with enough information about the Free Trade Agreement." Only one-quarter (26%) of the public believe the government has provided adequate information about the trade deal. While a majority in all provinces believe the government has not provided enough information, this sentiment is especially prevalent among residents of British Columbia (75%) and Ontario (74%).

C. Support/Opposition to the Free Trade Agreement

Overall levels of support for the Canada-U.S. FTA have remained relatively stable over the past year (Table 3). As such, a slim majority (51%) continue to express support for the free trade initiative. There have been some changes along regional lines, however.

Table 3

SUPPORT FOR FREE TRADE BY REGION

	JUNE 1987 %	AUGUST 1987 %	OCTOBER 1987 %	NOV/DEC I %	NOV/DEC II %	NOV/DEC III %	MAY 1988 %	CONFIDENCE INTERVAL ±%
GOOD IDEA/SUPPORT FREE TRADE AGREEMENT								
National average	50	50	48	46	46	51	51	3.4
British Columbia	63	52	57	62	59	64	45	8.7
Prairies	47	50	49	44	49	50	50	5.8
Ontario	41	37	37	33	32	35	40	5.8
Balance of Ontario	38	34	35	33	32	32	39	6.8
Toronto	47	43	42	33	32	42	42	10.3
Quebec	52	64	59	56	55	65	67	5.8
Atlantic region	51	45	49	48	48	49	51	5.0

As shown in Table 3, residents of Quebec continue to express above-average levels of support for the FTA. Although support levels have not changed since December among Quebec residents, there has been a significant increase in support over the last year. In contrast, this most recent survey shows a decline in public support for the Agreement in British Columbia, given that the level of support among British Columbians measured in the May survey is at the lowest level of support measured since June of 1987.

Support for the FTA has not changed significantly in the Atlantic region or the Prairies over the past year. After having bottomed out in mid-Fall at 32% support among Torontonians, there were signs of recovery in December 1987 in Torontonians' support for the FTA. The May 1988 survey data show that this apparent recovery was sustained over the next six months such that the level of support among Torontonians is consistent with the Ontario average. Residents of Ontario do, however, continue to express lower levels of support than the national average (40% vs 51%).

It is also notable that respondents who are familiar with the deal's contents are more supportive of the deal than those who are not familiar at all with the contents.

D. Likelihood of Changing Opinion

Given that overall levels of support for the FTA have remained relatively stable over the past year, it is not surprising to find that most Canadians (56%) believe themselves to be "not very likely" or "not at all likely" to change their current opinions on this issue. While a majority in all regions of the country report that they are unlikely to change their opinions regarding the Agreement, Ontario residents are the most steadfast in their views and Quebecers are least so (61% and 50% of residents of these provinces respectively say they are not likely to change their views).

In order to measure support volatility, a new variable was created by combining responses to the questions dealing with support for free trade and the likelihood of changing opinion on this issue. The following summarizes how the "Volatility of Support" variable was derived, indicating the various categories of supporter/opponent and describing the views held by those respondents included within each category.

DERIVATION OF VOLATILITY OF SUPPORT VARIABLE

CATEGORY		OPINIONS
Hard Supporter	--	Strongly support Free Trade Agreement and not at all likely/not very likely to change opinion. Support Agreement and not at all likely to change opinion.
Supporter	--	Strongly support Free Trade Agreement and somewhat/very likely to change opinion. Support Agreement and not very/somewhat/very likely to change opinion.
Opponent	--	Strongly oppose Free Trade Agreement and somewhat/very likely to change opinion. Oppose Agreement and not very/somewhat/very likely to change opinion.
Hard Opponent	--	Strongly oppose Free Trade Agreement and not likely at all/not very likely to change opinion. Oppose Agreement and not likely at all to change opinion.

Table 4 shows the distribution of respondents across the various categories of the "Volatility of Support" variable, on the basis of aggregate national data.

Table 4

VOLATILITY OF SUPPORT FOR THE FTA

	MAY 1988 %
Supporter	40
Hard supporter	11
Opponent	28
Hard opponent	15
No opinion	7

It is notable that one-in-five Ontario residents (20%) can be classified as hard opponents of the FTA, while fewer than one-in-ten Quebecers (8%) fall into this category. The number of hard supporters and opponents does not vary greatly from the national average across the other regions of the country. A disproportionate number of Quebec residents can be identified as supporters (59%), while a below-average number is found in Manitoba (29%).

Crosstabular analysis reveals that those with "hardened" views toward the Free Trade Agreement report greater personal involvement in the issue than average. Hard supporters and opponents are more likely to closely follow free trade discussions (62% and 59%, respectively), feel that they understand the issues at stake (43% and 42%, respectively), and say they are familiar with the contents of the Agreement (47% and 49%, respectively). Even among these people who reveal a higher than average degree of personal involvement with the issue, less than half of either group (hard supporters or hard opponents) feel they understand the free trade issue as well as they would like, or claim to be familiar with its contents.

III. ANTICIPATED EFFECTS OF FREE TRADE

A. Overall Economic Effects

Data from the October 1987 survey indicated that Canadians strongly held the view that the Americans "got a better deal than Canada." And opinions have not changed over the past six months (from 61% in October 1987 to 59% in May 1988). Three-in-ten (31%) continue to feel that the free trade deal is fair and balanced for both countries, while 7% say that "Canada got a better deal than the Americans." Ontario residents are the most likely to feel that the Americans received the better deal (67%). Apart from the question of the relative attractiveness of the Agreement for Canada and the United States, the more pertinent issue is whether the FTA is perceived to be beneficial for Canada.

It is noteworthy that the majority of Canadians believe that the Free Trade Agreement will have a positive effect on the national economy, on the economy of their province, and on individuals' own personal economic well-being. Table 5 presents the aggregate data on these measures. The table also shows that Canadians' expectations regarding the economic benefits likely to accrue from passage of the FTA have not changed since the winter of 1987.

Table 5

PERCEIVED ECONOMIC EFFECTS OF CANADA-U.S. FREE TRADE

	PERCENTAGE SAYING GOOD THING			
	November/December			
	I %	II %	III %	May 1988 %
THE FREE TRADE AGREEMENT IS A GOOD THING FOR...				
The Canadian economy	53	56	58	58
Your provincial economy	53	55	57	57
Economic well-being of you and your family	56	55	59	60

As found in past surveys, perceptions of the economic effects of the free trade deal are strongly related to overall levels of support for the Agreement. In fact, statistical analysis reveals that perceptions of the economic effects of free trade remain an almost perfect predictor of whether the respondent supports or opposes the Agreement (Table 6).

Table 6

FREE TRADE AGREEMENT: RELATIONSHIPS BETWEEN PERCEIVED ECONOMIC EFFECTS AND OVERALL SUPPORT

THE FREE TRADE AGREEMENT IS A GOOD THING FOR...	GAMMA WITH OVERALL SUPPORT*
The Canadian economy	0.920
Your provincial economy	0.881
Economic well-being of You and your family	0.914

* The larger the Gamma statistic the more closely associated the two attributes, with a perfect correlation being +1.0 or -1.0. The plus/minus sign indicates the direction of association.

Quebec residents remain the most optimistic about the economic benefits of free trade for the nation (73%), for their province (71%) and for themselves (71%). Residents of Ontario, on the other hand, continue to be sceptical about the economic benefits to be accrued from the Agreement (47% say it will be a good thing for Canada's economy; 46% think it will be a good thing for the Ontario economy; and 50% see it as a good thing for the economic well-being of themselves and their families.

Among British Columbians, the number saying they think free trade will be a good thing economically appears to have declined since the Fall of 1987. As compared to the October 1987 results, the May data show that fewer British Columbians think the FTA will be a good thing for the national economy (51% vs 69% in October 1987), for the provincial economy (48% vs 64%), or for their own personal economic situations (54% vs 71%).

Overall, views of the longer term economic effects of the FTA are also positive. A majority of the public (52%) agree with the proposition, "Over the long run the Canada - U.S. free trade deal will help to secure Canada's economic future." While 38% disagree with this statement, one-in-ten express uncertainty regarding the long-term benefits of free trade. Not surprisingly, Quebec residents are considerably more optimistic than Ontarians in their long-term expectations of the Agreement (Quebec: 64% agree; Ontario: 42% agree).

A partial explanation for the optimism held by the public about the economic effects of the Agreement can be found in the number agreeing with the following statement: "I am satisfied that the government will provide an appropriate amount of assistance to those harmed by the effects of free trade." Half of Canadians (52%) believe the government will assist those negatively affected by the Agreement; four-in-ten (39%) take the opposite viewpoint. Ontario residents are the least likely to expect the government to provide a buffer to those who may be harmed by the Agreement (56%).

There is widespread agreement among Canadians (72%) that, in order to take advantage of the new opportunities which the Free Trade Agreement can provide, the "important thing now is to start planning." Indeed, this sentiment is found across all regions of the country. It is also particularly evident among the Agreement's supporters, 88% of whom feel the "important thing now is to start planning on how to take advantage of the new opportunities the Free Trade Agreement can provide." Even a majority (55%) of those who claim to oppose the FTA also feel this way. Moreover, twice as many hard supporters (92%) as hard opponents (45%) agree with the statement.

The fact that even a sizable proportion of those people who oppose the deal agree that the public should now be planning to take advantage of the new opportunities the FTA can provide is of some significance. It suggests that irrespective of where they stand on the issue, Canadians appear to believe that it is now important to be "getting on with the job" of exploring and seizing whatever opportunities the FTA may bring for Canada.

B. Specific Anticipated Effects

As in previous surveys conducted for the Department of External Affairs on Canadians' attitudes concerning the FTA, respondents were asked to consider a number of possible outcomes or consequences of free trade between Canada and the United States. Specifically, they were presented with a series of statements about "what might happen now that there is a Free Trade Agreement between Canada and the United States" and were asked to indicate the extent to which they think these outcomes are likely to occur. Responses to these statements are shown in Table 7, along with previous data collected over the course of 1987.

Table 7

ANTICIPATED EFFECTS OF FREE TRADE -- AGGREGATE RESULTS

PERCENTAGE SAYING SOMEWHAT LIKELY/VERY LIKELY

	August 1987 %	October 1987 %	November/December I %	November/December II %	November/December III %	May 1988 %
Whether Canada and the U.S. will become more similar in many ways	82	79	77	78	80	76
Whether we will be able to maintain current government programs such as UI and health insurance	66	72	69	67	71	67
Whether American influence on our books, magazines, films and other parts of our culture will increase	72	71	68	71	68	67
Whether prices for most consumer good in Canada will generally be lower	66	71	66	69	71	66
Whether our economy will become so closely tied to the U.S. economy that we will gradually lose our ability to make our own decisions	68	63	64	63	59	62
Whether the U.S. will keep to the terms of the agreement	54	60	52	53	58	55
Whether overall there will be more jobs gained than lost in Canada	54	51	47	50	51	49
Whether many American companies will close their plants in Canada	41	38	41	41	39	39
Whether Canadians will have higher incomes than they do now	32	26	23	27	24	26

Major findings to note regarding the public's expectations of the effects the FTA will have on Canada include the following:

- Most Canadians (66%) continue to expect that consumer prices will be lower as a result of the Free Trade Agreement; however, only one-in-four (26%) are convinced that Canadians will have higher incomes than they do now;

- Canadians also express some doubts about the economic benefits to be derived from the Agreement. Fewer than half the population believe that overall there will be more jobs gained than lost in Canada (49%) and that the poorer regions of the country will be better off under the deal than they otherwise would be (39%);

- On the question of Canada's national identity, three-quarters (76%) believe that the similarities between Canada and the United States will increase, and 67% expect American influence on Canadian culture to grow. At the same time, the number of people expecting increased American pressure on cultural industries has been decreasing over the past year;

- It is also important to note that two-thirds of Canadians (66%) agree with the statement, "Canada may become more like the States in some areas, but Canadians themselves will not become like Americans as a result of free trade." This would suggest that while similarities between Canada and the United States are expected to increase as a result of free trade, a majority of Canadians do not think this will extend to the individual level and erase individual Canadians' sense of identity as Canadians;

- Most Canadians (59%) continue to question the ability of Canada to remain economically independent from the United States. Notably, however, the number who believe the Canadian economy "will become so closely tied to the U.S. economy that we will gradually lose our ability to make our own decisions" continues to decline (from 68% in October 1987);

o Evidence that many Canadians do not really know what will happen under the Free Trade Agreement with the United states continues to appear. While many fear the loss of Canadian independence, most (71%) also think that Canada "will be able to maintain current government programs such as unemployment insurance and health insurance"; and

o The data also provide evidence of scepticism regarding the intentions of the United States, as only a slim majority (55%) consider it likely that the Americans will keep to the terms of the Agreement, and four-in-ten (39%) believe that many American companies will close their plants in Canada.

In order to determine which of the various possible outcomes or consequences have the greatest impact on the public's overall assessment of the Free Trade Agreement, a technique known as multiple regression analysis was employed. Measures of correlation between perceived likelihood of each consequence and general support for the free trade deal are shown in Table 8.

Table 8

ANTICIPATED EFFECTS OF FREE TRADE -- CORRELATION ANALYSIS

	CORRELATION GAMMA					CORRELATION COEFFIECIENT				
	Oct. 1987	Nov./Dec. I	Nov./Dec. II	Nov./Dec. III	May 1988	Oct. 1987	Nov./Dec. I	Nov./Dec. II	Nov./Dec. III	May 1988
Whether Canada and the U.S. will become similar in many ways	.257	-.314	-.341	-.443	-.280	--	NS	*	*	NS
Whether we will be able to maintain current government programs such as UI and health insurance	.459	.551	.525	.550	.574	.069	.179	.123	.092	.106
Whether American influence on our books, magazines, films and other parts of our culture will increase	-.322	-.300	.359	-.419	-.252	-.048	NS	-.057	-.078	NS
Whether prices for most consumer goods in Canada will generally be lower	.324	.320	.306	.336	.389	.076	.079	.060	.046	.083
Whether our economy will become so closely tied to the U.S. economy that we will gradually lose our ability to make our own decisions	-.648	-.708	-.702	-.739	-.715	-.201	-.200	-.205	-.258	-.253

Table 8 -- continued

	CORRELATION GAMMA					CORRELATION COEFFIECIENT				
	Oct. 1987	Nov./Dec. I	Nov./Dec. II	Nov./Dec. III	May 1988	Oct. 1987	Nov./Dec. I	Nov./Dec. II	Nov./Dec. III	May 1988
Whether the U.S. will keep to the terms of the agreement	.466	.552.	.556	.546	.516	.055	.094	.107	.079	.066
Whether overall there will be more jobs gained than lost in Canada	.622	.662	.630	.632	.690	.181	.224	.174	.175	.176
Whether many American companies will close their plants in Canada	-.292	-.337	-.388	-.427	-.331	NS	***	--	--	NS
Whether Canadians will have higher incomes than they do now	.462	.534	.560	.526	.537	.057	.109	.153	.145	.061

* Each issue statement was correlatd with overall support for the free trade agreement. the larger the Gamma statistic, the more closely associated the two attributes

** The standardized regression co-efficient indicates the nature of the relationship between each possible consequence and overall support for the free trade agreement. The larger the number, the more closely associated that particular variable is to attitudes toward the free trade agreement.

*** Indicates that the relationship between the independent variable and attitudes about the free trade agreement is statistically insignificant.

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The multiple regression analysis employed in this study shows that the correlation between those who support/oppose the Agreement and the perceived economic and independence effects of the trade deal have remained relatively stable, on average, since the Fall of 1987. The analysis also reveals:

1. The most important factor affecting assessments of the Free Trade Agreement continues to be "whether our economy will become so closely tied to the United States' economy that we will gradually lose our ability to make our own decisions. Public concern over whether or not Canada will be able to maintain current government programs such as unemployment insurance and health insurance is also an especially important factor affecting support for the deal;

2. Of second most importance, in terms of anticipated consequences affecting support for the Agreement, are expectations regarding the loss or gain of Canadian jobs; and

3. Other major factors affecting support for free trade are Canadians' concerns about whether or not the United States will keep to the terms of the Agreement and whether or not prices for consumer goods in Canada will generally be lower with the deal in force.

Other items affecting support for the Free Trade Agreement, in order of importance, are whether:

- Canadians will have higher incomes than they do now;
- American influence on our books, magazines, films, and other parts of our culture will increase; and
- Canada and the U.S. will become similar in many ways.

C. Regional Differences in Anticipated Effects

As found in past surveys, the public's expectations regarding the effects which the FTA will have on Canada not only vary in intensity, but also vary along regional lines. These variations, which are most apparent among residents of Ontario, Quebec and the Prairie provinces, are summarized below.

Ontario -- Many of the attitudinal differences found between Ontario residents and the national average in past surveys persist. For example:

- Ontarians remain among the most convinced that American companies will close their plants in Canada (45% versus 39% nationally), although the number of Ontarians seeing this as a likely consequence of the Free Trade Agreement has declined since December 1987 (from 50% to 45% in May);

- While half of all Canadians (49%) view it as likely that there will be more jobs gained than lost under the Agreement, Ontarians remain less convinced that this will occur (41%), and their views have not changed significantly over the last six months;

- Ontarians are also more likely to foresee Canada losing the ability to make its own economic decisions (66% versus 62%) and to think it unlikely that Canada will be able to maintain its current government programs (36% versus 31% nationally).

- Ontarians also continue to express more doubts than Canadians overall about whether the Americans will keep to the terms of the deal. Currently, half (49%) of the residents of this province say it is unlikely the U.S. will keep to the terms agreed upon (versus 43% nationally).

Quebec -- Residents of this province remain among the most optimistic in their views of the anticipated effects the free trade deal will have on the Canadian economy. More specifically, Quebecers are more likely than Canadians on average to expect both a greater number of jobs to be gained than lost (59% versus 49%) and higher incomes (33% versus 26%) under the terms of the Agreement. On the other hand, Quebecers are less likely to view the Agreement as affecting the nature of Canada; 37% say it is unlikely that American influence over our culture will increase (versus 32% nationally), while three-quarters believe Canada will be able to maintain current government programs (versus 67% nationally).

Prairies -- As found in previous studies, residents of the Prairie provinces think it unlikely that many American companies will close their plants in Canada (72% versus 59% nationally).

D. Effect of Free Trade on Canadian Business Sectors and Regional Development

1. Effect on business sectors

As in past surveys, Canadians were again presented with a list of various industries and asked whether each of the industries identified would do better or worse under the terms of the Free Trade Agreement. Responses to these questions are found in Table 9 , along with the results gathered in the Winter of 1987.

As shown this table, only the oil and gas industry is expected to do better under the terms of the Free Trade Agreement by a majority of Canadians (56%), and views concerning this industry's ability to compete have remained relatively stable since the Winter of 1987. On the other hand, most Canadians remain convinced that the wine industry (55%) and the agricultural and farming industry (56%) will be worse off as a result of the deal. Views as to the effect of the FTA on the fish and fish products industry and on the cultural industries also remain unchanged.

Two major changes have occurred over the last few months in the public's expectations of the effects the trade deal will have on Canadian businesses. First, there has been a gradual increase in the number of people expecting the car and car parts industry to be better off because of the Agreement (from 29% in October 1987 to 44% currently). Second, in contrast to the automobile industry, the number saying the wood and paper products industry will be better off has declined (from 59% in October 1987 to 47% currently).

The anticipated effects of the FTA on each industrial sector examined continue to be strongly related to general support for the Free Trade Agreement, as reflected in the Gamma measures of association. Support for the trade deal is currently most strongly associated with the anticipated effects of its passage on the agricultural and farming industry, and the strength of this relationship has increased since December 1987. On the other hand, the association between between overall support and the expected effect of the Agreement on the automotive industry, although still strong, has weakened considerably over the past few months.

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Table 9

EFFECT OF FREE TRADE ON CANADIAN BUSINESS

	BETTER				WORSE				NO EFFECT				CORRELATION GAMMA			
	Nov./Dec.			May	Nov./Dec.			May	Nov./Dec.			May	Nov./Dec.			May
	I	II	III	1988	I	II	III	1988	I	II	III	1988	I	II	III	1988
	%	%	%	%	%	%	%	%	%	%	%	%				
Wood and paper products	48	47	51	47	45	44	41	45	5	7	7	7	.496	.484	.485	.447
Oil and gas industry	56	55	57	56	35	34	33	32	7	9	8	10	.451	.530	.483	.452
Fish and fish products	41	42	43	43	47	44	44	43	10	11	11	12	.575	.475	.540	.485
Film, books, and magazines	37	35	41	40	47	48	42	46	14	15	15	13	.381	.348	.399	.275
Wine industry	29	26	31	30	58	58	56	55	7	9	9	13	.330	.362	.237	.320
Agriculture and farming	33	36	35	33	57	53	55	56	8	10	9	9	.535	.567	.530	.585
Cars and car parts	31	30	36	44	59	56	50	42	9	11	12	12	.491	.496	.543	.376

On a regional basis, residents of Ontario remain the most pessimistic about the effects of the FTA on the car and car parts industry. Their views have moderated considerably, however, from two-thirds believing the effects to be negative in the Fall of 1987 to just over half (52%) currently. On the other hand, Ontarians' expectations regarding the wine industry have remained stable over the past few months, as two-thirds (68%) remain convinced that this industry will do worse under the terms of the Agreement (versus 55% nationally).

There appears to have been a diminution in the extent of difference between the attitudes of Quebecers and those of Canadians overall regarding the likely effects of the FTA on various industries. While Quebecers previously were more likely to assess the FTA as having a positive effect on the automotive industry than were Canadians in general in December 1987, the May survey results show that this difference no longer exists. Nonetheless, residents of Quebec remain uncertain as to the effects the FTA will have on the wine industry. Roughly equal numbers say this industry will be worse off (28%) or not affected (25%), while 45% believe it will benefit from the deal.

The views of British Columbia residents, as revealed in the May survey results, appear to have grown more negative over the past few months. In particular, they are considerably more pessimistic than are Canadians on average, in their opinions on the effects the FTA will have on the wine industry (77%), the fish and fish products industry (56%), and the agricultural and farming industry (71%).

2. Regional development

As discussed in a previous section, the anticipated effects of the FTA on provincial economies varies across the different regions of the country. In addition, a majority (58%) of the Canadian public agree with the proposition, "I'm concerned that free trade is only going to increase tensions among regions and groups in Canada." Views on this issue have not changed since December 1987.

Concern over the FTA increasing regional tensions is widespread, as views do not differ across the provinces. Support for the FTA, however, is related to respondents' opinions concerning the effect of the FTA on regional tensions in Canada. That is, the greater the likelihood that a respondent thinks an increase in regional tensions is a possible result of the trade deal, the greater the likelihood that they would oppose the FTA.

As the above analysis indicates, Canadians' attitudes toward the Canada-U.S. Free Trade Agreement are strongly linked to their expectations of the tangible economic benefits which the deal will produce -- for the country, for their province and for themselves. It can be assumed that the benefits accruing from the FTA are likely to be unevenly felt across the regions of the country and perhaps within different time frames following ratification of the FTA in both Canada and the United States. In light of this, another avenue of inquiry pursued in the survey questionnaire was the effects on support levels across regions under a scenario in which the Agreement were to benefit other regions more than that in which the respondent resides.

To explore this, respondents were asked if they would support the FTA if the deal were to benefit Canada as a whole, but their own province would benefit less than the rest of the country. One-in-four say they would continue to favour the Agreement even if their province of residence were to benefit less; however, the number indicating support has declined since June 1987 (52%). On the other hand, the number who would oppose the Agreement if it was of relatively less benefit for their province than for Canada as a whole has grown from 48% to 58%.

Table 10 shows that the number of Canadians who claim they would support the FTA even if their province were to benefit less than the rest of Canada has declined in every region of the country over the past year.

Table 10

FREE TRADE SUPPORT IF AGREEMENT BENEFITS CANADA MORE THAN YOUR PROVINCE (% SUPPORT)

	JUNE 1987 %	MAY 1988 %
Canada	51	41
British Columbia	63	54
Prairies	52	46
Ontario	54	44
Quebec	44	30
Atlantic	50	36

While the decline in the number claiming to support the FTA under these circumstances has declined across the board, the most notable declines have occurred among residents of Quebec (from 44% to 30%) and among Atlantic Canadians (from 50% to 36%). In contrast to the more pessimistic outlook evident in other survey findings discussed in the preceding pages, British Columbia residents appear to be the most "altruistic" in terms of supporting the FTA (Table 10), irrespective of the relative benefits for British Columbia. Residents of B.C. are more likely than those in other provinces or Canadians on average to support the FTA, if it "were to benefit Canada as a whole, but your own province were to benefit less than the rest of Canada."

Also worth highlighting is the Ontario number. Ontarians have consistently emerged in the free trade attitude surveys conducted as being the least supportive. The above data indicate that, despite this sentiment, many Ontarians (though a minority in the May survey) appear to be prepared to support the FTA if it is in the national interest, as distinct from being in the interests of the province of Ontario specifically.

IV. ECONOMIC AND INDEPENDENCE ISSUES

A. Overview

The analysis of anticipated effects or consequences of the FTA from the preceding section of this report reveals that the views of Canadians regarding the trade deal are essentially based on two considerations:

1. **Economic Effects** -- the perceived effects of the Agreement on the national and provincial economies, as well as on personal economic situations, particularly as this relates to job opportunities; and

2. **Canadian Independence and Identity Concerns** -- whether Canadians can retain their ability to make their own decisions, and maintain their national character.

The analysis which follows examines Canadians' perceptions of the Free Trade Agreement and the anticipated effects of the deal for Canada, in terms of the above two considerations.

B. Jobs and American Investment

Both supporters and opponents of free trade between Canada and the U.S. generally agree that by eliminating tariffs and reducing other trade barriers between the two countries, increased American investment in Canada will likely occur. However, these two groups do not agree on whether or not this would be a good thing for the country; supporters of the Agreement see this as beneficial as it would lead to a greater number of new jobs, while opponents fear the loss of Canadian autonomy.

As shown in Table 11, just over half the public (56%) believe job creation is more important than limiting American influence on the Canadian economy; however, the number holding this view has declined somewhat since the end of 1987. On the other hand, there has been no change over the past few months in the number reporting that increased job creation is not as important as limiting American influence, and this is due to increased uncertainty as to whether job creation or limiting American influence is the most important consideration.

Table 11

JOBS AND AMERICAN INVESTMENT

	JUNE 1987 %	AUGUST 1987 %	OCTOBER 1987 %	NOV/DEC I %	NOV/DEC II %	NOV/DEC III %	MAY 1988 %
The jobs which many be created by increased American investment in Canada are not as important as limiting American influence in the Canadian economy	41	41	39	38	35	35	36
The jobs created by increased American investment in Canada are more important than limiting American influence in the Canadian economy	59	57	59	58	62	62	56

Regional differences on the question of whether job creation or limiting American influence on the Canadian economy is more important have largely dissipated. Unlike the December 1987 findings, residents of British Columbia (down from 68% to 60%) and the Atlantic region (down from 68% to 59%) no longer differ from the national average in the importance they attach to creating new jobs.

C. Free Trade and Canadian Independence

Public perceptions of the effects of the FTA on Canadian independence have remained relatively stable since October 1987. As such, respondents are divided in their views as to whether the trade deal will strengthen or weaken Canada's ability to play an independent role in the world (Table 12).

Table 12

FREE TRADE AND CANADIAN INDEPENDENCE

	OCTOBER 1987 %	NOV/DEC I %	NOV/DEC II %	NOV/DEC III %	MAY 1988 %
INDEPENDENCE					
The Free Trade Agreement will...					
Strengthen Canada's economy and thus enable it to continue to play an independent role in the world	43	38	40	42	42
Tie Canada so closely to the U.S. that it will weaken our ability to play an independent role in the world	56	61	59	58	56

A slight majority (56%) continue to believe that the FTA will "tie Canada so closely to the U.S. that it will weaken our ability to play an independent role in the world." At the same time, a sizeable minority (42%) also continue to believe that, in strengthening Canada's economy, the Agreement will enable Canada to continue to play an independent role in the world. It is evident from the data presented in Table 11 that public opinion on this question no longer appears to be in flux such that, on balance, a majority of Canadians anticipate that the FTA will inhibit Canada's ability to play an independent role in the world.

Ontario residents are somewhat more likely to believe that the trade deal will weaken Canada's ability to act independently (61%). There are few other regional differences of note on this question.

Not surprisingly, and as found in previous surveys, general support for the FTA is strongly related to the perceived effects of the deal on Canadian independence. The vast majority of opponents of the Agreement (82%) say it will weaken Canadian independence, while most supporters (64%) believe that Canada will continue to play an independent role in the world.

The public is also largely divided in their views of the effects the FTA will have on Canada's identity. Four-in-ten (43%) are opposed to the deal because of a belief that it will end some government measures which are designed to protect the national identity and make Canadians different from Americans. A slim majority of 55%, however, say Canada's identity is now strong enough that it no longer requires as much protection through government measures. Opponents of the Agreement are the most likely to express doubts about Canada's ability to maintain its identity under the terms of the Agreement (75%).

V. ANTICIPATED NEED FOR GENERAL GOVERNMENT ASSISTANCE

A. Individuals

One of the main issues involved in debates concerning the FTA concerns the possible adjustments which some individuals in Canada may have to make once the Agreement has been passed into law. Indeed, most Canadians (59%) disagree with the statement, "All the discussions about free trade may matter to businesses, but free trade won't make any difference to the average Canadian worker."

A majority of Canadians (62%) believe that individual Canadians will require a great deal (25%) or some (37%) federal government assistance to adjust to the effects of free trade with the U.S. While one-in-four (23%) think Canadians will need a little federal assistance, only 15% say no federal assistance will be required to deal with the changes.

Regionally, residents of Quebec are the most likely to say a great deal of federal assistance will be required to help individuals adjust to the changes required under the FTA (35%). Conversely, a disproportionate number of residents of the Prairie provinces say no federal assistance will be necessary (22%).

While a majority believe that Canadians will require assistance to help them adjust to the changes free trade with the United States will bring about, most (55%) do not believe that the federal government will provide enough help to those in need of it. One-third (35%) think the federal government will provide enough assistance to those negatively affected as a result of the trade deal.

British Columbians are among the most likely to say the federal government will not provide enough assistance (68%), while almost half of Quebecers (47%) believe the government will provide adequate assistance. Not surprisingly, views regarding the government assistance question are strongly related to overall support for the FTA. In other words, those supportive of the trade deal are among the most likely to say the federal government will provide enough assistance to those negatively affected by the Agreement (49%), and opponents of the Agreement are the most likely to say government assistance will be inadequate (69%).

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B. Businesses

1. Amount of assistance needed

In comparison to the perceived need for individual assistance, the public is even more convinced that Canadian businesses will require federal government assistance to adjust to the effects of the trade deal. In fact, more than seven-in-ten feel businesses will need a great deal (29%) or some (44%) federal assistance. Only 27% feel that Canadian businesses will require only a little or no federal assistance. The perceived need for federal assistance is found across all regions of the country.

The public is largely divided in their opinions as to whether or not the federal government will provide enough help to those Canadian businesses that may be negatively affected by the changes brought about by the implementation of the FTA. While 43% say there will be enough assistance, 48% think the assistance will be inadequate. Residents of British Columbia (56%) and Ontario (58%) express the greatest doubts about the adequacy of the amount of government assistance to be provided, while Quebec residents are most likely to say there will be enough assistance (55%). As would be expected, supporters of the FTA are much more likely than opponents to say the federal government will be providing adequate help to businesses to help them adjust to the changes involved (58% and 23%, respectively).

2. Type of assistance

Various options are available to the federal government in terms of providing assistance to Canadian businesses to help them adjust to the terms of the FTA. Among those who believe the federal government has a role in providing at least some assistance to business sectors in Canada, most (55%) favour the government actively co-operating with businesses in sharing the costs of finding new customers in the United States. A significant minority (41%) believe, however, that the government should provide information and advice about new opportunities for doing business across the border.

A majority in all regions of the country are in favour of the government providing financial assistance to businesses. In fact, both supporters (54%) and opponents (57%) of the FTA feel that government financial assistance will be necessary to help businesses locate opportunities in the U.S.

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A majority in all regions of the country are in favour of the government providing financial assistance to businesses. In fact, both supporters (54%) and opponents (57%) of the FTA feel that government financial assistance will be necessary to help businesses locate opportunities in the U.S.

VI. FEDERAL GOVERNMENT MANAGEMENT

Respondents were presented with a number of "issue statements" concerning the federal government's management and objectives in regard to the conduct of the free trade talks and overall management of the free trade issue. Responses provide an indication of the public's perceptions as to how the federal government has handled the negotiations, whether it is prepared for the changes anticipated under free trade and whether the free trade initiative is seen as an isolated one, or as part of a broader plan for Canada's economic development. Aggregate results appear in Table 13. The importance of these attitudes in terms of their relationship to overall support for the FTA is highlighted by the Gamma statistic.

The data reveal that most Canadians remain convinced that the FTA is a part of a government plan "...to improve Canada's trading situation with countries around the world." This view is widespread across the country. In fact, even among those who oppose the trade deal, a significant number (42%) acknowledge that the government is attempting to improve the country's trading situation and this number has grown over the past few months (from 28% in December 1987). As previously suggested, while many Canadians oppose the FTA, even opponents are increasingly willing to acknowledge that the government had good intentions and motives in attempting to reach a trade agreement with the United States.

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Table 13

PERCEPTIONS OF FEDERAL GOVERNMENT MANAGEMENT AND OBJECTIVES REGARDING FREE TRADE

	PERCENTAGE AGREE				GAMMA CORRELATION			
	Nov/Dec			May	Nov/Dec			May
	I %	II %	III %	1988 %	I	II	III	1988
I see the free trade deal with the American as part of a general effort by the government to improve Canada's trade situation with countries around the world	63	59	63	63	.676	.647	.689	.511
From what I've heard or read, Canada gave away too much to the Americans in the Free Trade Agreement	63	60	57	58	-.591	-.670	-.641	-.573
I'm concerned that free trade is only going to increase tensions among regions and groups in Canada	59	58	56	58	-.524	-.615	-.615	-.463
I think the government has a good idea of how to deal with the changes the Free Trade Agreement will bring in Canada	45	47	50	44	.675	.708	.714	.535

With regard to the management of the adjustment issue, the Canadian public is divided in their views as to whether or not the "government has a good idea of how to deal with the changes the Free Trade Agreement will bring into Canada." Indeed, the number agreeing that the government has a good idea of how to deal with and is prepared for the changes the FTA will bring has declined since the Winter of 1987 (from 50% to 44%). Residents of Quebec (56%) and Atlantic Canada (54%) remain the most convinced that the government is prepared to cope with the changes involved, while Ontario residents remain least likely to accept this position (33%). In addition, supporters of the FTA are considerably more likely than opponents to agree that the government is prepared (64% versus 21%, respectively).

While there is no consensus regarding the government's knowledge of how to deal with the changes the FTA will bring, most (58%) agree the trade deal will increase tensions among the various regions and groups in Canada. As discussed in a previous section, this view is widespread across the country.

A majority of Canadians (58%) also continue to agree that "Canada gave away too much to the Americans in the Free Trade Agreement." However, the number agreeing with this proposition has declined slightly from that measured in the first wave of the November/December 1987 survey. Regional differences on this question are not apparent. It is interesting to note that while opponents of the FTA overwhelmingly agree that Canada gave away too much (80%), supporters of the deal are divided in their views (41% agree; 44% disagree).

Canadians' expectations about whether or not the FTA would be passed by the Canadian Parliament and the U.S. Congress were also ascertained. The plurality (41%) feel that if it is not passed, it has been a worthwhile effort to improve Canada's economic prospects. Roughly equal numbers would be upset that Canada wasted time and energy trying to get a deal (18%), would be happy because they think free trade is a bad thing for Canada (19%), and would be pleased because this particular deal is not good enough (21%).

On a regional basis, Quebec residents would be more likely than the national average to say it was a worthwhile effort if the free trade deal falls through (54%). Few other differences along provincial lines are evident. Views do differ significantly, however, in terms of overall support for the FTA. As shown in Table 14, hard supporters of the trade deal disproportionately say they would be upset that Canada wasted time and energy on the initiative, while a plurality of hard opponents would be happy because they feel free trade is bad for Canada. In addition, both supporters and hard supporters are more likely to say it was a worthwhile effort, and both opponents and hard opponents are more likely to say this particular deal is not good enough.

Table 14

VOLATILITY OF SUPPORT AND OPINIONS IF FTA FALLS THROUGH

	THIS DEAL NOT GOOD ENOUGH %	HAPPY/FT BAD FOR CANADA %	WORTHWHILE EFFORT %	CANADA WASTED TIME %
Canadian average	22	19	41	18
Hard supporter	2	4	62	31
Support	10	6	63	22
Opponent	36	30	20	12
Hard opponent	36	49	4	9

If the Canada-U.S. Free Trade Agreement does not come into effect, almost equal numbers say that the reason would be because not enough Canadian political leaders (21%) and not enough American political leaders could agree (23%) on this particular deal. The majority (55%), however, do not lay responsibility on one country alone, but say that neither American nor Canadian political leaders could agree that the particular FTA which was negotiated is a good agreement. Perceived responsibility for the lack of an agreement does not vary significantly across the various regions of the country.

Given that the Free Trade Agreement must be passed into law by the end of this year or it will not take effect, Canadians were asked whether or not they think there has been enough public debate on this issue. While three-in-ten (32%) say a final decision regarding the deal should occur as enough public debate has taken place, most (76%) say the consequences of free trade are so important that Canadians should take as much time as necessary for further discussions. This viewpoint is widely held by Canadians across all regions of Canada. In addition, a majority of both supporters and opponents of the FTA agree that as much time as necessary should be taken to fully debate the issue (57% and 78%, respectively).

VII. FREE TRADE OPINION LEADERS

One of the findings evident from attitudes toward federal government management of the free trade initiative is that Canadians do not think that they have been provided with enough information about the Free Trade Agreement. Previous research also shows that many Canadians feel that they need more information about the details of a free trade deal and its possible consequences. The question then becomes where or to what source or spokesperson Canadians are most likely to turn to as a source of this information. To ascertain this, respondents were asked the following question:

> Thinking about the various people whose opinions you respect on the Free Trade Agreement, whose opinion are you relying on most in making up your mind about the Free Trade Agreement since it was signed...?

Results show that Canadians are likely to turn to a variety of sources for information pertaining to the FTA. A plurality (31%), however, continue to identify the news media, followed by economists and other specialists (22%) and business leaders (15%). One-in-ten or fewer mention federal (10%) or provincial (7%) government leaders, or labour leaders (9%). Opinions have not changed significantly since the Fall of 1987, although the public is somewhat less likely to look to provincial government leaders for their information on free trade issues.

Table 15

FREE TRADE OPINION LEADERS

	AUGUST 1987 %	OCTOBER 1987 %	NOV/DEC I %	NOV/DEC II %	NOV/DEC III %	MAY 1988 %
WOULD CONSIDER MOST THE OPINION OF...						
Economists and other specialists	40	25	23	22	21	22
Business leaders	20	15	14	13	15	15
News media	13	29	32	30	32	31
Federal government leaders	9	11	9	10	12	10
Provincial government leaders	6	11	11	12	11	7
Labour leaders	8	6	6	6	6	9

Opinions regarding free trade opinion leaders do not vary greatly across the country, although British Columbia residents are somewhat more likely to look to labour leaders for guidance (13%), and Atlantic Canadians disproportionately mention federal government leaders (18%). In addition, free trade supporters are more likely to look to business leaders (21%), while opponents of the initiative are more likely to rely on labour leaders (16%).

When respondents were further probed for their specific views regarding business leaders, most (61%) say they would primarily rely on information provided by businesses known throughout Canada when making up their minds about the Free Trade Agreement. The number relying on businesses with a national profile has fallen since August 1987 (from 74%). There has been an increase in the number who say they consider the views of people who run businesses known mainly in the area where they live to be most important (from 25% to 33%). Attitudes toward business leaders do not vary greatly depending on region of residence or level of support for the FTA.

VIII. MAJOR DEMOGRAPHIC DIFFERENCES

As found in previous research, the main differences of opinion on the Free Trade Agreement based on demographic characteristics relate to sex, age and education. The following section examines these differences.

A. Sex

A considerable "gender gap" between the two sexes continues to exist in terms of attitudes toward the Canada-U.S. Free Trade Agreement. Men remain more supportive than women, both in extent and intensity, of the trade deal, and are more optimistic regarding the potential economic benefits for the country.

The most prominent differences between men and women are as follows:

- Men continue to express a greater understanding than women of the FTA (34% versus 22%, respectively). In addition, men claim more familiarity than women with the contents of the Agreement (38% versus 26%, respectively);

- Men are more likely than women to believe that the trade deal will benefit both the national (64% versus 52%) and provincial economies (63% versus 50%), as well the economic situations of individual Canadians (66% versus 54%). Views have not changed greatly over the past few months. A partial explanation for this difference lies in perceptions of the long-term effects of the FTA for Canada. Men (58%) tend to agree that the deal will help to secure Canada's economic future, while women are divided on this issue (46% agree; 44% disagree);

- In terms of specific effects which the FTA will have on Canada, men are more likely than women to foresee increased job creation, lower consumer prices, higher incomes for average Canadians, and help for poorer regions of the country. On the other hand, women express greater doubts about Canada's ability to maintain social programs and to make "our own economic decisions." As well, men's and women's views toward the effect of the FTA on Canada's international role also differ, with women being more likely than men to say the deal will weaken Canada's ability to play an independent role in the world (60% versus 52% respectively);

- Men remain more optimistic than women about the prospects for resource industries -- such as the oil, forestry, fishing and, agricultural and farming industries. However, the sexes no longer differ in their views of the FTA's expected effects on the automotive, cultural and beer industries. It is notable that women remain less likely than men to say that the wine industry will be worse off under the trade deal;

- In terms of federal government assistance, women are more likely than men to say that both businesses and individuals will require a great deal of assistance to adjust to the changes brought about by the FTA. However, these two groups do not differ in their views of whether or not the federal government will provide an adequate amount of assistance to those negatively affected by the deal. Views on this issue are divided; and

- As found in previous research, women remain more likely than men to rely on information from the news media when forming their opinions toward the FTA. Men, on the other hand, tend to look to business leaders as their primary source of information.

B. Age

The most outstanding generational gaps occur between those over 55 years of age and those under age 25. In general, older Canadians tend to express greater opposition to the Free Trade Agreement, while support for the deal is more evident among the country's youth.

Attitudinal differences along generational lines are as follows:

- Young people under 25 years of age are among the least attentive to discussions concerning free trade issues, while older Canadians are among the most likely to claim they closely follow the free trade debate (35% versus 67%, respectively). In addition, those over 55 years of age are significantly more likely than those under 25 to report that they are familiar with the contents of the Agreement, and to feel they understand the debate as well as they would like to;

- Levels of support/opposition for the FTA are more volatile among younger than older Canadians. Over half (55%) of those under 25 years indicate that it is likely that they would change their opinion about the deal, while most older citizens (66%) say they are not likely to change their views;

- The elderly are more pessimistic than the young about the effects of the Agreement on the national and provincial economies, and the economic situations of average Canadians. In addition, older Canadians are less likely to foresee an increase in job creation, and express greater doubts about the country's ability to maintain its social programs;

- In terms of the effects of the FTA on specific industries, age differences have largely dissipated, with two exceptions. Young people are considerably more optimistic than the elderly about the consequences of the FTA for the wine and fishing industries; and

- Those over 55 years of age also attach greater importance than the young to Canada's independence; the elderly are among the most likely to say limiting American influence in Canada is more important than increasing job creation opportunities.

C. Education

Well-educated Canadians tend to express greater support than average for the free trade initiative. Nonetheless, this group continues to express concern about the effects the FTA will have on Canada's independence and cultural identity.

More specifically, differences on the basis of educational attainment are as follows:

- The university educated are more likely than average to report that they closely follow the free trade discussions and are familiar with the contents of the Agreement; however, they do not differ in their reported understanding of the issues involved;

- o The well-educated remain more supportive of the Free Trade Agreement, in both extent and intensity. A partial explanation for this finding is that this group disproportionately views the trade deal as being a good thing for the national economy and for the economic situations of individual Canadians. In addition, they tend to express greater optimism about the anticipated effects of the Agreement, in terms job creation, lower prices and higher incomes;

- o With regard to specific sectors, the university educated are more likely than average to say the oil, forest and fishing industries will be better off as a result of the Agreement; however, they express above-average pessimism concerning the wine, automotive and cultural industries;

- o The higher educated also express disproportionate concern about the effects of the FTA on Canada's sovereignty, as this group remains more likely than average to say the jobs that would be created under the terms of the Agreement are not as important as limiting American influence in Canada;

- o Although the university educated are less likely, on average, to foresee individual Canadians requiring a great deal of federal government assistance to adjust to the trade deal, they are among the most likely to disagree that "Free trade won't make any difference to the average Canadian worker." Indeed, they are among the most convinced that the important thing is to start planning now on how to take advantage of the new opportunities the agreement will provide; and

- o Not surprisingly, the university educated are more likely than average to rely on information provided by economists and other specialists (31%), and business leaders (22%), when forming their opinions of the trade issue.

IX. SUMMARY AND CONCLUSIONS

This segment of the report presents a summary of the main conclusions and findings which emerge from the May 1988 survey. They are grouped below according to the various topic areas explored in this report.

Attentiveness To, Understanding Of and Support For the FTA

- Despite the wide media coverage given to the Free Trade Agreement, less than half the public report that they are closely following the discussions concerning the deal. Given this, it is not surprising to find that most Canadians continue to say they are not familiar with what is contained in the trade deal between Canada and the United States. In addition, fewer than three-in-ten claim they understand the deal as well as they would like.

- Overall levels of support for the FTA have not changed significantly over the past year, as a slim majority continue to favour Canada signing this Agreement. In terms of support volatility, 10% of Canadians can be classified as hard supporters, since they are unlikely to waver in their support for the trade deal, and 15% can be classified as hard opponents. As such, the vast majority of Canadians acknowledge that there is some possibility that their views toward the Agreement might change.

- On a regional basis, residents of Quebec continue to express above-average levels of support for the FTA, and Ontario residents remain less supportive of the deal. It is also notable that a disproportionate number of hard opponents to the Agreement can be found in Ontario. Views of the Agreement have changed in British Columbia over the past few months and, as a result, current levels of support for the Agreement in this province are the lowest measured over the past year.

Anticipated Effects of Free Trade

- Although the public continues to say the Americans "got a better deal than Canada," most believe the Agreement will have positive effects on the national and provincial economies, as well as on the economic situations of the average Canadian. In addition, views of the long-term effects of the Agreement are also positive; a majority of Canadians agree that the FTA will help to secure Canada's economic future.

o Most Canadians (66%) continue to expect consumer prices to be lower under the terms of the Agreement; however, they are less optimistic of the FTA's effect on personal incomes (26% say they will be higher).

o Uncertainty is also expressed about the specific economic benefits the country will receive; less than half believe increased job creation will result (49%) and the poorer regions of the country will be better off as a result of free trade (39%).

o Concern is also expressed about issues relating to Canada's independence and identity. Most believe that American influence in Canada's culture will grow (67%) and that the two countries will become more alike (76%). A majority of the public (59%) also question Canada's ability to remain economically independent from the U.S.

o The most important consequence for the public in terms of affecting their levels of support for the FTA continues to be whether the Agreement would tie the Canadian economy so closely to the U.S. economy that Canada would gradually lose its ability to make its own decisions. Next in importance remains the anticipated effects of free trade on job creation in Canada.

Effect of Free Trade on Canadian Business Sectors and Regional Development

o A majority of Canadians continue to say the oil and gas industry would be better off under the terms of the Agreement, while most remain convinced that the wine, and agricultural and farming industries would be hurt. The public's views of the effects of the FTA on the fishing, beer and cultural industries are divided.

o Since the end of 1987, there has been an increase in the number saying the automotive industry will be better off after the free trade deal is signed (from 29% to 44%). In contrast, the number saying the wood and paper products industry will be better off has declined (from 59% to 47%).

o Canadians (58%) fear the FTA will increase regional tensions in Canada. Evidence to support this view is found in the fact that most (58%) would oppose the Agreement if their province of residence were to receive fewer benefits than the rest of the country, and the number holding this view has increased over the past while (from 48% in December 1987).

Economic and Independence Issues

o A slim majority of Canadians (56%) continue to hold the view that the number of new jobs that would be created under the terms of the FTA is more important than limiting American influence on the Canadian economy. However, uncertainty as to whether job creation or limiting American influence is the most important has grown over the past few months.

o The public remains largely divided in their views of whether the FTA would strength or weaken Canada's ability to play an independent role in the world. In addition, while a slim majority (55%) are confident that Canada's identity is strong enough to not need government protection, a significant number (43%) fear the loss of government measures which are designed to protect the national identity and make Canadians different from the Americans.

Anticipated Need for General Government Assistance

o Canadians are convinced that both individuals (62%) and businesses (73%) will require federal government assistance to adjust to the effects of the Free Trade Agreement. However, uncertainty is expressed regarding the adequacy of the expected federal assistance.

o With regard to specific types of assistance to be provided to Canadian businesses, a majority across all regions of the country are in favour of the government actively co-operating with businesses in sharing the costs of finding new customers in the United States.

Federal Government Management

- o Canadians continue to view the federal government's actions regarding the FTA as "part of a general effort to improve Canada's trading situation with countries around the world."

- o However, the public's views of whether or not the government is prepared to handle the changes involved with the signing of the Agreement are divided. In fact, the number saying the government is prepared to deal with the changes has declined since the end of 1987 (from 50% to 44%).

- o If the Agreement is not passed by the Canadian Parliament and the U.S. Congress, a plurality (41%) feel that that it has been a worthwhile effort to improve Canada's economic prospects. However, roughly equal numbers would be upset that Canada wasted time and energy trying to get a deal, would be happy because they think free trade is a bad thing for Canada, or would be happy because this deal was not good enough. In addition, the majority (55%) would say that both Canadian and U.S. politicians could not agree on this particular deal, and the primary responsibility for failure to reach Agreement does not lie with one country alone.

- o Three-quarters of the public say that because the consequences of free trade are so important for the country, Canadians should take as much time as necessary for further debates on the issue.

Free Trade Opinion Leaders

- o Canadians continue to turn to a variety of sources for their information about free trade issues, but are relying on certain sources to help them make up their minds on the trade deal more than they are on others. In particular, a plurality (31%) continue to rely on the news media, followed by economists and other specialists, and business leaders. The number relying on provincial government leaders has declined since the end of 1987.

- Specific views toward the business community reveal that Canadians remain more likely to rely on transnational businesses for information on free trade issues; however, there has been an increase in the number who assign the greatest importance to the views of people who run local businesses (from 25% to 33%).

TECHNICAL APPENDIXES

APPENDIX

A. SURVEY OVERVIEW

Decima Research is pleased to present to the Department of External Affairs, the results of a nation-wide study of public attitudes toward the Canada-U.S. Free Trade Agreement.

Senior Research Consultant and principal investigator for this study was David MacMartin who was assisted in the various phases of research and analysis by Greg Ebel.

1. Sample Selection

The population consists of all Canadian residents 18 years of age and older. Male and female respondents were selected in the same proportion as the general population, on a 50/50 sex quota. A total of 1,500 interviews were completed.

Effective survey research must be based on a sample truly representative of the universe of interest. A multi-stage sampling technique was employed to gather the data for this study. The essential feature of this procedure is that individual respondents are predetermined by the selection procedure itself. That predetermination is made by careful examination of a series of controlled choices.

The sampling technique produced a systematic random sample with probability of selection disproportionate to size at the National level. The first step in the sampling procedure was the division of Canada into strata or "regions," i.e., (Table A).

Table A

SAMPLE STRATA

	PERCENTAGE OF POPULATION	PPS N	DPS N	WEIGHTS	WEIGHTED N
REGIONS					
British Columbia	11.3	172	136	.7120	97
Alberta	9.2	140	111	.7120	79
Saskatchewan	4.0	60	100	.3430	34
Manitoba	4.2	63	100	.3620	36
Balance of Ontario	26.7	405	229	1.0000	229
Toronto CMA	8.8	132	106	.7107	75
Quebec	26.5	390	318	.7150	227
New Brunswick	2.9	43	100	.2460	25
Nova Scotia	3.5	52	100	.2990	30
Prince Edward Island	.5	8	100	.0440	4
Newfoundland	2.3	35	100	.2000	20
		1500	1500		857

Table A presents the percentage of the total population of Canada represented in each region, followed by the proportionate number of cases in each region (PPS). The third column presents the disproportionate sample actually completed (DPS) followed by the weights used in each region. The fifth column represents the number of cases in each strata after the weighting was applied.

Within each of these regions, a sampling procedure was employed which is based upon mapping the linkage between the geographic location of individual telephone exchanges and Statistics Canada's fundamental building block for the census -- the enumeration area (EA).

Telephone companies divide their service regions into smaller areas served by a single switching centre. Within each switching centre area, all telephone numbers begin with the same two digits. We refer to these mutually exclusive exchange areas as NNXs (NNX representing the first three digits of a telephone number). Using census data, together with maps showing the geographic boundaries of NNXs, it is possible to determine exact population figures for each NNX and determine the appropriate number of respondents to be surveyed in each NNX.

Primary sampling units (groups of NNXs) and secondary sampling units (individual NNXs) were selected on the basis of probability proportionate to population size. Telephone numbers were then generated using a computerized random number generation program employing random start and fixed interval methods.

2. Field Procedures

The questionnaires were printed, consecutively numbered, and assembled into field packs of three interviews two males and one female or two females and one male. This procedure ensured that the 50/50 sex quota would be met by preselecting males and females before the interviewing began.

The interviews took place between May 7th and May 12th, 1988. Weekday interviewing was conducted between the hours of 5:30 and 10:00 p.m. Weekend interviewing was conducted between the hours of 10:00 a.m. and 5:00 p.m. The questionnaire contained 58 questions and took approximately 19 minutes to complete. Fifteen percent (15%) of all interviews were monitored while in progress for procedure and content from an extension monitor. All interviews were carefully edited as soon as they were completed to ensure that no questions were omitted and that skip-patterns were followed correctly.

Experienced telephone interviewers were used to collect the data. A briefing was held by the Field Supervisor and the Research Analyst was present to answer questions or clarify procedures. The Field Supervisor first read the questionnaire to the interviewers, thereby ensuring that pronunciation would be correct and uniform, and second, interviewer-respondent role-playing was used to illustrate skip and rotation patterns. The interviewers then had an opportunity to ask questions.

On the first day in the field, the Research Analyst listened to the interviewers on an extension monitor. The monitor prevents the interviewer and respondent from knowing they are being listened to. This ensured that the skip and rotation patterns were followed correctly and that there were no questions causing interviewers any particular difficulty. When an error was caught, the interviewer was briefed again and the respondent was called back in order to correct the questionnaire.

3. Coding

The questionnaires were coded and the data were entered by experienced Decima personnel. The following standard procedures were followed:

o An initial briefing;
o Supervision of trained staff; and
o Verification of 15% of each coder's work.

Using the first 25% of completed questionnaires in each stratum, codes were constructed for the open-end questions by sorting and writing out the responses into independent categories. The Research Analyst checked all categories for completeness and consistency.

4. Data Processing

The entry and processing of the data were carried out on-site using Decima's Digital PDP 11/44 computer. Decima's interactive software system, designed specifically for survey analysis, has a robust data entry facility, which permits cleaning of the data, including out-of-range values and skip-pattern errors, as well as other logic errors. The fully cleaned data were then summarized into aggregate tables. Further analysis of the data included crosstabulation tables, measures of association, regression analysis, and factor analysis.

5. Confidence Limits and Validation

The sample of 857 cases produces results which are accurate for the population of Canada as a whole within ±3.4 percentage points 95 out of 100 times.

B. INTERVIEW SCHEDULE

A. Are you 18 years of age or older and a Canadian resident?

YES (CONTINUE)..A
NO (ASK TO SPEAK TO ELIGIBLE RESPONDENT, IF STILL "NO,"
THANK AND TERMINATE)...B

B. Have I reached you at your home phone number?

YES (CONTINUE)..A
NO (ASK TO SPEAK TO ELIGIBLE RESPONDENT, IF STILL "NO,"
THANK AND TERMINATE)...B

C. Do you, or does anyone in your family or household work in the following kinds of business...a market research firm, advertising agency, public relations firm, or the news media?

YES (THANK AND TERMINATE -- RECORD INCIDENCE ON CALL
RECORD SHEET)...A
NO (CONTINUE)...B

Note 1: Responses may not sum to 100% due to rounding throughout the Technical Appendixes.

2: (*) denotes a percentage value greater than 0 but less than 0.5 throughout the Technical Appendixes.

1. How closely would you say you have been following the discussions about free trade with the United States? Would you say you've been following these discussions...(READ LIST)?

NOT CLOSELY AT ALL	1	(14%)
NOT VERY CLOSELY	2	(39%)
CLOSELY	3	(35%)
VERY CLOSELY	4	(11%)
NO OPINION (VOLUNTEERED)	5	(*)

2. Regardless of how closely you may have been following the discussions about free trade, do you feel that you understand the issue as well as you would like?

YES	1	(28%)
NO	2	(72%)
NO OPINION (VOLUNTEERED)	3	(*)

3. Would you say you are very familiar, familiar, not too familiar, or not familiar at all with what is contained in the Free Trade Agreement between Canada and the United States?

NOT FAMILIAR AT ALL	1	(17%)
NOT TOO FAMILIAR	2	(51%)
FAMILIAR	3	(28%)
VERY FAMILIAR	4	(3%)
NO OPINION (VOLUNTEERED)	5	(0%)

As you probably know, the Canada-U.S. free trade negotiations have resulted in a Free Trade Agreement.

4. Generally speaking, do you strongly support, support, oppose, or strongly oppose the Free Trade Agreement that was reached by Canada and the United States?

STRONGLY OPPOSE	1	(11%)
OPPOSE	2	(32%)
SUPPORT	3	(46%)
STRONGLY SUPPORT	4	(5%)
NO OPINION (VOLUNTEERED)	5	(6%)

5. And how likely do you think it is that you would change the opinion you have now about the Canada-U.S. Free Trade Agreement...very likely, somewhat likely, not very likely, or not likely at all?

NOT LIKELY AT ALL	1	(22%)
NOT VERY LIKELY	2	(34%)
SOMEWHAT LIKELY	3	(35%)
VERY LIKELY	4	(6%)
NO OPINION (VOLUNTEERED)	5	(3%)

6. If you had to guess, would you say that Canada got a better deal than the Americans, that the Americans got a better deal than Canada, or do you think that the free trade deal is fair and balanced for both countries?

CANADA GOT A BETTER DEAL THAN THE AMERICANS	1	(7%)
THE AMERICANS GOT A BETTER DEAL THAN CANADA	2	(59%)
THE FREE TRADE DEAL IS FAIR AND BALANCED	3	(31%)
NO OPINION (VOLUNTEERED)	4	(3%)

I'd like you to tell me for each of the following whether you think that a trade agreement is a very good, good, bad, or very bad thing. How about in terms of its effect on...(READ AND ROTATE ITEMS 7 TO 9)

7. The Canadian economy?

VERY BAD	1	(7%)
BAD	2	(32%)
GOOD	3	(51%)
VERY GOOD	4	(7%)
NO OPINION (VOLUNTEERED)	5	(3%)

8. Your provincial economy?

VERY BAD	1	(7%)
BAD	2	(32%)
GOOD	3	(49%)
VERY GOOD	4	(7%)
NO OPINION (VOLUNTEERED)	5	(4%)

9. Economic well-being of you and your family?

VERY BAD	1	(4%)
BAD	2	(27%)
GOOD	3	(54%)
VERY GOOD	4	(6%)
NO OPINION (VOLUNTEERED)	5	(9%)

END OF ROTATION

I am going to read you a list of statements various people have made about what might happen now that there is a Free Trade Agreement between Canada and the United States. For each one, I'd like you to tell me whether you think it is very likely, somewhat likely, somewhat unlikely, or very unlikely that this will result? The first one is...(READ AND ROTATE STATEMENTS 10-19)

10. Overall, there will be more jobs gained than lost in Canada.

VERY UNLIKELY	1	(20%)
SOMEWHAT UNLIKELY	2	(30%)
SOMEWHAT LIKELY	3	(35%)
VERY LIKELY	4	(14%)
NO OPINION (VOLUNTEERED)	5	(2%)

11. Prices of many goods imported from the United States into Canada will be lower.

VERY UNLIKELY	1	(12%)
SOMEWHAT UNLIKELY	2	(21%)
SOMEWHAT LIKELY	3	(47%)
VERY LIKELY	4	(19%)
NO OPINION (VOLUNTEERED)	5	(1%)

12. We will be able to maintain current government programs such as unemployment insurance and health insurance.

VERY UNLIKELY	1	(14%)
SOMEWHAT UNLIKELY	2	(17%)
SOMEWHAT LIKELY	3	(43%)
VERY LIKELY	4	(24%)
NO OPINION (VOLUNTEERED)	5	(3%)

13. Many American companies will close their plants in Canada.

VERY UNLIKELY	1	(20%)
SOMEWHAT UNLIKELY	2	(40%)
SOMEWHAT LIKELY	3	(25%)
VERY LIKELY	4	(14%)
NO OPINION (VOLUNTEERED)	5	(2%)

14. Our economy will become so closely tied to the American economy that we will gradually lose our ability to make our own economic decisions.

VERY UNLIKELY	1	(14%)
SOMEWHAT UNLIKELY	2	(24%)
SOMEWHAT LIKELY	3	(29%)
VERY LIKELY	4	(33%)
NO OPINION (VOLUNTEERED)	5	(1%)

15. Canadians will have higher incomes than they do now.

VERY UNLIKELY	1	(29%)
SOMEWHAT UNLIKELY	2	(43%)
SOMEWHAT LIKELY	3	(20%)
VERY LIKELY	4	(6%)
NO OPINION (VOLUNTEERED)	5	(2%)

16. The poorer regions of the country would be better off under the Free Trade Agreement than they otherwise would be.

VERY UNLIKELY	1	(24%)
SOMEWHAT UNLIKELY	2	(34%)
SOMEWHAT LIKELY	3	(32%)
VERY LIKELY	4	(8%)
NO OPINION (VOLUNTEERED)	5	(3%)

17. American influence on our books, magazines, films and other parts of our culture will increase.

VERY UNLIKELY	1	(9%)
SOMEWHAT UNLIKELY	2	(23%)
SOMEWHAT LIKELY	3	(37%)
VERY LIKELY	4	(30%)
NO OPINION (VOLUNTEERED)	5	(2%)

18. Canada and the United States will become more similar in many ways.

VERY UNLIKELY	1	(8%)
SOMEWHAT UNLIKELY	2	(16%)
SOMEWHAT LIKELY	3	(43%)
VERY LIKELY	4	(33%)
NO OPINION (VOLUNTEERED)	5	(1%)

19. The United States will keep to the terms of the agreement.

VERY UNLIKELY	1	(19%)
SOMEWHAT UNLIKELY	2	(24%)
SOMEWHAT LIKELY	3	(40%)
VERY LIKELY	4	(15%)
NO OPINION (VOLUNTEERED)	5	(2%)

END OF ROTATION

20. Some people say we should not have free trade because it will mean the end of some of those government measures which protect Canada's identity and make us different from the United States.

Other people say that we should be confident enough about the Free Trade Agreement because Canada's identity is now strong enough that it no longer needs as much protection through government measures.

Thinking of these two points of view, which <u>one</u> best reflects your own?

SHOULD NOT HAVE FREE TRADE	1	(45%)
SHOULD BE CONFIDENT	2	(53%)
NO OPINION (VOLUNTEERED)	3	(2%)

21. Some people say that the jobs which may be created by free trade with the U.S. are not as important as limiting American influence in Canada.

Other people say that the jobs which may be created by freer Canada-U.S. trade are more important than limiting American influence in the Canadian economy.

Thinking of these two points of view, which <u>one</u> best reflects your own?

JOBS NOT AS IMPORTANT AS LIMITING INFLUENCE	1	(36%)
JOBS MORE IMPORTANT THAN LIMITING INFLUENCE	2	(56%)
NO OPINION (VOLUNTEERED)	3	(8%)
NO OPINION (VOLUNTEERED)	4	(1%)

22. Some people say that the Free Trade Agreement will strengthen Canada's economy and thus enable it to continue to play an independent role in the world.

Other people say that the Free Trade Agreement will tie Canada so closely to the United States that it will weaken our ability to play an independent role in the world.

Thinking of these two points of view, which one best reflects your own?

WILL STRENGTHEN ABILITY TO PLAY INDEPENDENT ROLE	1	(42%)
WILL WEAKEN ABILITY TO PLAY INDEPENDENT ROLE	2	(56%)
NO OPINION (VOLUNTEERED)	3	(2%)

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23. Thinking about the various people whose opinions you respect on the Free Trade Agreement, whose opinion are you relying on most in making up your mind about the Free Trade Agreement since it was signed...economists and other specialists, business leaders, labour leaders, federal government leaders, your provincial government leaders or the news media?

ECONOMISTS AND OTHER SPECIALISTS	1	(22%)
BUSINESS LEADERS	2	(15%)
LABOUR LEADERS	3	(9%)
FEDERAL GOVERNMENT LEADERS	4	(10%)
PROVINCIAL GOVERNMENT LEADERS	5	(7%)
NEWS MEDIA	6	(31%)
NO OPINION (VOLUNTEERED)	7	(6%)

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24. Thinking specifically about business leaders, of the following, whose opinion would you consider or rely on most in making up your mind about free trade...the people who run businesses which are well-known throughout Canada, or people who run businesses known mainly in the area where you live?

BUSINESSES WELL-KNOWN THROUGHOUT CANADA	1	(61%)
BUSINESSES KNOWN MAINLY IN LOCAL AREA	2	(33%)
NO OPINION (VOLUNTEERED)	3	(5%)
NO OPINION (VOLUNTEERED)	4	(1%)

Now, I'm going to read you a list of statements various people have made at one time or another. I'd like you to tell me how you personally feel about each statement by giving me a number between -5 and +5, where -5 means you totally disagree with the statement and +5 means you totally agree with the statement. Many people's opinions fall somewhere in between these two points depending on how they feel about the statement. The first statement is...(ROTATE STATEMENTS 25 - 34...READ FIRST STATEMENT...REPEAT SCALE INSTRUCTIONS IF REQUESTED) Where would you place yourself on this scale?

TOTALLY DISAGREE					DEPENDS					TOTALLY AGREE
-5	-4	-3	-2	-1	0	+1	+2	+3	+4	+5

	MEAN RATING
25. Canada may become more like the States in some areas, but Canadians themselves will not become like Americans as a result of free trade.	1.58
26. I am satisfied that the government will provide an appropriate amount of assistance to those harmed by the effects of free trade.	0.69
27. From what I've heard or read, Canada gave away too much to the Americans in the Free Trade Agreement.	1.22
28. The federal government has provided the Canadian people with enough information about the Free Trade Agreement.	1.82
29. All the discussions about free trade may matter to businesses, but free trade won't make any difference to the average Canadian worker.	1.05
30. The important thing now is to start planning on how to take advantage of the new opportunities the Free Trade Agreement can provide.	2.04
31. I see the free trade deal with the Americans as part of a general effort by the government to improve Canada's trade situation with countries around the world.	1.02
32. I'm concerned that free trade is only going to increase tensions among regions and groups in Canada.	0.81
33. Over the long run the Canada-U.S. free trade deal will help to secure Canada's economic future.	0.38
34. I think the government has good idea of how to deal with the changes the Free Trade Agreement will bring in Canada.	0.21

END OF ROTATION

Now I'm going to list some Canadian businesses and I'd like you to tell me for each one whether you think the Free Trade Agreement with the United States will mean the industry will be better off, or worse off as a result. How about...(READ AND ROTATE Q35 TO Q42)

35. Oil and gas industry?

WORSE OFF......................1	(32%)
NOT AFFECTED (VOLUNTEERED)....2	(10%)
BETTER OFF.....................3	(56%)
NO OPINION (VOLUNTEERED)......4	(2%)

36. Wine industry?

WORSE OFF......................1	(55%)
NOT AFFECTED (VOLUNTEERED)....2	(13%)
BETTER OFF.....................3	(30%)
NO OPINION (VOLUNTEERED)......4	(2%)

37. Wood and paper products?

WORSE OFF......................1	(45%)
NOT AFFECTED (VOLUNTEERED)....2	(7%)
BETTER OFF.....................3	(47%)
NO OPINION (VOLUNTEERED)......4	(1%)

38. Fish and fish products?

WORSE OFF......................1	(43%)
NOT AFFECTED (VOLUNTEERED)....2	(12%)
BETTER OFF.....................3	(43%)
NO OPINION (VOLUNTEERED)......4	(2%)

39. Agriculture and farming?

WORSE OFF......................1	(56%)
NOT AFFECTED (VOLUNTEERED)....2	(9%)
BETTER OFF.....................3	(33%)
NO OPINION (VOLUNTEERED)......4	(2%)

40. Cars and car parts?

WORSE OFF......................1	(42%)
NOT AFFECTED (VOLUNTEERED)....2	(12%)
BETTER OFF.....................3	(44%)
NO OPINION (VOLUNTEERED)......4	(2%)

41. Films, books, and magazines?

WORSE OFF	1	(46%)
NOT AFFECTED (VOLUNTEERED)	2	(13%)
BETTER OFF	3	(40%)
NO OPINION (VOLUNTEERED)	4	(2%)

42. Beer industry?

WORSE OFF	1	(45%)
NOT AFFECTED (VOLUNTEERED)	2	(17%)
BETTER OFF	3	(36%)
NO OPINION (VOLUNTEERED)	4	(2%)

END OF ROTATION

43. If the Free Trade Agreement were to benefit Canada as a whole, but your own province were to benefit less than the rest of Canada, would you strongly favour, favour, oppose, or strongly oppose the agreement?

STRONGLY OPPOSE	1	(23%)
OPPOSE	2	(35%)
FAVOUR	3	(35%)
STRONGLY FAVOUR	4	(6%)
NO OPINION (VOLUNTEERED)	5	(2%)

One of the issues involved in discussions about Canada-U.S. free trade concerns the adjustments or changes which some individuals and businesses or industry sectors in Canada may have to make once the Free Trade Agreement has been passed into law...

On the basis of what you may have seen, read or heard, do you think...(READ AND ROTATE Q44 AND Q45)...will require a great deal, some, only a little, or no federal government assistance to adjust to the effects of the Free Trade Agreement?

44. Canadian businesses?

NO FEDERAL GOVERNMENT ASSISTANCE	1	(8%)
ONLY A LITTLE FEDERAL GOVERNMENT ASSISTANCE	2	(19%)
SOME FEDERAL GOVERNMENT ASSISTANCE	3	(43%)
A GREAT DEAL OF FEDERAL GOVERNMENT ASSISTANCE	4	(29%)
NO OPINION (VOLUNTEERED)	5	(1%)

45. individual Canadians?

NO FEDERAL GOVERNMENT ASSISTANCE	1	(15%)
ONLY A LITTLE FEDERAL GOVERNMENT ASSISTANCE	2	(23%)
SOME FEDERAL GOVERNMENT ASSISTANCE	3	(36%)
A GREAT DEAL OF FEDERAL GOVERNMENT ASSISTANCE	4	(25%)
NO OPINION (VOLUNTEERED)		(1%)

END OF ROTATION

As far as you are aware, will the federal government be providing enough help to those...(READ AND ROTATE Q46 AND Q47)...who may be negatively affected as a result of the Canada-U.S. Free Trade Agreement?

46. Canadian businesses?	YES	1	(42%)
	NO	2	(49%)
	NO OPINION (VOLUNTEERED)	3	(8%)
	NO OPINION	4	(1%)

47. individual Canadians?	YES	1	(35%)
	NO	2	(55%)
	NO OPINTION (VOLUNTEERED)	3	(9%)
	NO OPINION	4	(1%)

END OF ROTATION

IF ANSWER TO Q44 WAS "NO FEDERAL GOVERNMENT ASSISTANCE" (CODE 1)...
SKIP TO Q49, OTHERWISE ASK:

Thinking specifically about businesses...

48. The federal government can assist them in taking advantage of the opportunities available under Canada-U.S. free trade by providing different types of help. Which of the following types of help for businesses would you be most in favour of the federal government providing?

GIVING INFORMATION AND ADVICE ABOUT NEW OPPORTUNITIES FOR DOING BUSINESS IN THE UNITED STATES	1	(41%)
OR		
CO-OPERATING WITH BUSINESSES IN SHARING THE COSTS OF FINDING NEW CUSTOMERS IN THE U.S	2	(55%)
NO OPINION (VOLUNTEERED)	3	(4%)

49. If the Canada-U.S. Free Trade Agreement falls through and is not passed by the Canadian Parliament and the U.S. Congress, which of the following points of view would more closely reflect your own...(ROTATE)

YOU WOULD BE UPSET THAT CANADA HAS WASTED ALL THIS TIME AND ENERGY TRYING TO GET A DEAL	1	(18%)
YOU WOULD FEEL IT HAD BEEN A WORTHWHILE EFFORT TO IMPROVE CANADA'S ECONOMIC PROSPECTS EVEN IF IT DIDN'T SUCCEED	2	(41%)
YOU WOULD BE VERY HAPPY AND RELIEVED BECAUSE YOU THINK FREE TRADE WOULD BE A BAD THING FOR CANADA	3	(19%)
YOU WOULD BE PLEASED BECAUSE THIS PARTICULAR FREE TRADE AGREEMENT IS NOT GOOD ENOUGH FOR CANADA	4	(21%)
NO OPINION (VOLUNTEERED)	5	(2%)

50. Again, if the Canada-U.S. Free Trade Agreement did not come into effect, which of the following do you think would likely be most responsible for the fact that the agreement fell through... (ROTATE)

NOT ENOUGH CANADIAN POLITICAL LEADERS COULD AGREE THAT IT'S A GOOD AGREEMENT	1	(21%)
NOT ENOUGH AMERICAN POLITICAL LEADERS COULD AGREE THAT IT'S A GOOD AGREEMENT	2	(23%)
NEITHER AMERICAN NOR CANADIAN POLITICAL LEADERS COULD AGREE THAT THE FREE TRADE AGREEMENT IS A GOOD AGREEMENT	3	(55%)
NO OPINION (VOLUNTEERED)	4	(2%)

51. The Free Trade Agreement must be passed into law by the end of this year or it will not take effect.

Some people say that this is enough time to make a final decision on whether to accept the agreement because there has already been a lot of public debate about its possible consequences.

Other people say that the consequences of the Free Trade Agreement are so important that we should take as much time as necessary for further discussion even if that means missing the deadline and letting the agreement fall through.

Thinking of these two points of view, which best reflects your own?

FINAL DECISION ON ACCEPTING THE DEAL SHOULD OCCUR AS ENOUGH PUBLIC DEBATE ON THE ISSUE HAS TAKEN PLACE	1	(32%)
THE CONSEQUENCES ARE SO IMPORTANT THAT WE SHOULD TAKE AS MUCH TIME AS NECESSARY FOR FURTHER DISCUSSIONS	2	(67%)
NO OPINION (VOLUNTEERED)	3	(1%)

This survey is being conducted on behalf of the Department of External Affairs. So that we can use your responses we would like to ask you some questions that would be used for statistical purposes only. We want to assure you that your answers will be kept confidential in two ways: first, your name will not be given to the Department of External Affairs, and second, your answers will be combined with those of other participants in the survey before being given to the Department of External Affairs. This survey is registered under the Access to Information Act and the Privacy Act.

52. What is your age, please? (IF RESPONDENT REFUSES, OFFER TO READ CATEGORIES AND HAVE HIM/HER TELL YOU WHICH CATEGORY HE/SHE FALLS INTO)

18-19 YEARS	01	(4%)
20-24 YEARS	02	(10%)
25-29 YEARS	03	(14%)
30-34 YEARS	04	(14%)
35-39 YEARS	05	(13%)
40-44 YEARS	06	(11%)
45-49 YEARS	07	(8%)
50-54 YEARS	08	(6%)
55-59 YEARS	09	(5%)
60-64 YEARS	10	(5%)
65 YEARS OR OLDER	11	(11%)

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53. Which of the following income groups includes your annual household income? (READ CHOICES)

LESS THAN $ 5,000	01	(2%)
$ 5,000 - $ 9,999	02	(5%)
$10,000 - $14,999	03	(8%)
$15,000 - $19,999	04	(10%)
$20,000 - $24,999	05	(11%)
$25,000 - $29,999	06	(12%)
$30,000 - $34,999	07	(11%)
$35,000 - $39,999	08	(8%)
$40,000 - $44,999	09	(8%)
$45,000 - $49,999	10	(6%)
$50,000 AND OVER	11	(19%)

54.A Are you currently attending school, college, or university as a full-time student?

YES (SKIP TO Q56)	6*	(7%)
NO (GO TO Q55.B)	A	

IF "NO" TO Q55.A, ASK:

55.B What is the highest level of schooling that you have completed?

PUBLIC/ELEMENTARY SCHOOL (GRADE 1-8)	1	(7%)
SOME HIGH SCHOOL	2	(20%)
GRADUATED HIGH SCHOOL (GRADE 12 OR 13)	3	(27%)
VOCATIONAL/TECHNICAL/COLLEGE/CEGEP	4	(17%)
SOME UNIVERSITY	5	(7%)
GRADUATED UNIVERSITY	7	(16%)

55. Are you currently employed outside the home?

NO (SKIP TO Q59)	1*	(33%)
YES (GO TO Q57)	2	(67%)
NO OPINION (VOLUNTEERED)	3	(1%)

IF "YES" TO Q56, ASK:

56. Are you working full-time or part-time?

FULL-TIME	1	(83%)
PART-TIME	2	(17%)
NO OPINION (VOLUNTEERED)	3	(1%)

57. What is your occupation, that is what are your main job responsibilities? What type of company do you work for?

PROFESSIONAL	01	(11%)
AGRICULTURE	02	(4%)
CIVIL SERVANT	03	(5%)
OWNER/SELF EMPLOYED	04	(9%)
MANAGEMENT/EXECUTIVE	05	(8%)
CULTURAL	06	(1%)
TEACHER	07	(6%)
MEDIUM-LEVEL SERVICE	08	(10%)
LOW-LEVEL SERVICES	09	(14%)
MEDIUM-LEVEL OFFICE WORKER	10	(10%)
LOW-LEVEL OFFICE WORKER	11	(4%)
MEDIUM-LEVEL PRODUCTION WORKER	12	(10%)
LOW-LEVEL PRODUCTION WORKER	13	(5%)
HOUSEWIFE	14	(*)
STUDENT	15	(0%)
RETIRED	16	(0%)
ARMY	17	(*)
UNEMPLOYED	18	(0%)
SCIENTIFIC/TECHNICAL	19	(4%)

58. Do you, or does any other member of your family belong to a labour union?

RESPONDENT	1	(14%)
OTHER MEMBER OF FAMILY	2	(17%)
BOTH (VOLUNTEERED)	3	(4%)
NONE (VOLUNTEERED)	4	(65%)

59. Sex. (BY OBSERVATION)

MALE	1	(50%)
FEMALE	2	(50%)

60. Language (BY OBSERVATION)

ENGLISH	1	(76%)
FRENCH	2	(24%)

C. FRENCH INTERVIEW SCHEDULE

A. Avez-vous 18 ans ou plus et êtes-vous un(e) résidant(e) du Canada?

OUI (CONTINUEZ)..A
NON (DEMANDEZ À PARLER À UN(E) RÉPONDANT(E) ADMISSIBLE; SI LA RÉPONSE EST TOUJOURS "NON", REMERCIEZ ET TERMINEZ).........B

B. Vous ai-je rejoint(e) au numéro de téléphone de votre domicile?

OUI (CONTINUEZ)..A
NON (DEMANDEZ À PARLER À UN(E) RÉPONDANT(E) ADMISSIBLE; SI LA RÉPONSE EST TOUJOURS "NON", REMERCIEZ ET TERMINEZ).........B

C. Est-ce que vous, ou un autre membre de votre famille ou de votre foyer, travaillez dans le genre d'entreprise suivante...une compagnie d'études de marché, une agence de publicité, une compagnie de relations publiques, un média d'information?

OUI (REMERCIEZ ET TERMINEZ -- INSCRIVEZ L'APPEL SUR LE "RAPPORT DES APPELS")..A
NON (CONTINUEZ)..B

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1. À quel point avez-vous suivi de près les discussions sur le libre-échange avec les États-Unis? Diriez-vous que vous avez suivi ces discussions...(LISEZ LA LISTE)?

SANS AUCUNE ATTENTION	1	(14%)
SANS GRANDE ATTENTION	2	(39%)
AVEC ATTENTION	3	(35%)
AVEC BEAUCOUP D'ATTENTION	4	(11%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(*)

2. Si on ne tient pas compte de l'attention que vous avez portée aux négociations sur le libre-échange, trouvez-vous que vous comprenez cet enjeu autant que vous le voudriez?

OUI	1	(28%)
NON	2	(72%)
SANS OPINION (RÉPONSE SPONTANÉE)	3	(*)

3. Diriez-vous que vous êtes très au courant, au courant, pas très au courant ou pas au courant du tout de ce qui est contenu dans l'accord de libre-échange entre le Canada et les États-Unis?

PAS AU COURANT DU TOUT	1	(17%)
PAS TRÈS AU COURANT	2	(51%)
AU COURANT	3	(28%)
TRÈS AU COURANT	4	(3%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(0%)

Comme vous le savez sans doute, les négociations sur le libre-échange entre le Canada et les États-Unis ont abouti à un accord de libre-échange.

4. D'une façon générale, êtes-vous fortement favorable, favorable, opposé(e) ou fortement opposé(e) à l'accord de libre-échange qui a été conclu entre le Canada et les États-Unis?

FORTEMENT OPPOSÉ(E)	1	(11%)
OPPOSÉ(E)	2	(32%)
FAVORABLE	3	(46%)
FORTEMENT FAVORABLE	4	(5%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(6%)

5. Et, d'après vous, à quel point est-il probable que vous adoptiez une autre opinion que celle que vous avez maintenant sur l'accord de libre-échange entre le Canada et les États-Unis?... Est-ce très probable, assez probable, assez improbable, ou tout à fait improbable?

TOUT À FAIT IMPROBABLE	1	(22%)
ASSEZ IMPROBABLE	2	(34%)
ASSEZ PROBABLE	3	(35%)
TRÈS PROBABLE	4	(6%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(3%)

6. Si vous deviez deviner, diriez-vous que le Canada a fait une meilleure affaire que les Américains, que les Américains ont fait une meilleure affaire que le Canada, ou croyez-vous que l'accord de libre-échange est juste et bien partagé entre les deux pays?

LE CANADA A FAIT UNE MEILLEURE AFFAIRE QUE LES AMÉRICAINS	1	(7%)
LES AMÉRICAINS ONT FAIT UNE MEILLEURE AFFAIRE QUE LE CANADA	2	(59%)
L'ACCORD DE LIBRE-ÉCHANGE EST JUSTE ET BIEN PARTAGÉ	3	(31%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(3%)

J'aimerais que vous me disiez si selon vous, pour chacune des réalités suivantes, un accord commercial est une très bonne chose, une bonne chose, une mauvaise chose ou une très mauvaise chose. Qu'en est-il, en ce qui concerne l'effet que cela aura sur...(LISEZ ET ALTERNEZ L'ORDRE DES ITEMS 7 À 9)

7. L'économie canadienne?

TRÈS MAUVAISE	1	(7%)
MAUVAISE	2	(32%)
BONNE	3	(51%)
TRÈS BONNE	4	(7%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(3%)

8. Votre économie provinciale?

TRÈS MAUVAISE	1	(7%)
MAUVAISE	2	(32%)
BONNE	3	(49%)
TRÈS BONNE	4	(7%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(4%)

9. Le bien-être financier de vous-même et de votre famille?

TRÈS MAUVAISE..1 (4%)
MAUVAISE...2 (27%)
BONNE..3 (54%)
TRÈS BONNE...4 (6%)
SANS OPINION (RÉPONSE SPONTANÉE).................................5 (9%)

FIN DE L'ALTERNANCE

Je vais vous lire une liste de déclarations faites par différentes personnes à propos de ce qui peut arriver maintenant qu'il y a un traité de libre-échange entre le Canada et les États-Unis. Pour chacune d'elles, j'aimerais que vous me disiez si vous croyez qu'il est très probable, assez probable, assez improbable ou très improbable que cela se produise. Voici la première déclaration... (LISEZ LA LISTE ET ALTERNEZ L'ORDRE DES DÉCLARATIONS 10 À 19)

10. Dans l'ensemble, il y aura plus d'emplois gagnés que d'emplois perdus au Canada.

TRÈS IMPROBABLE..1 (20%)
ASSEZ IMPROBABLE...2 (30%)
ASSEZ PROBABLE...3 (35%)
TRÈS PROBABLE..4 (14%)
SANS OPINION (RÉPONSE SPONTANÉE).................................5 (2%)

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11. Le prix de beaucoup de biens de consommation importés des États-Unis par le Canada sera plus bas.

TRÉS IMPROBABLE..1 (12%)
ASSEZ IMPROBABLE...2 (21%)
ASSEZ PROBABLE...3 (47%)
TRÈS PROBABLE..4 (19%)
SANS OPINION (RÉPONSE SPONTANÉE).................................5 (1%)

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12. Nous pourrons maintenir les programmes gouvernementaux actuels, tels que l'assurance-chômage et l'assurance-maladie.

TRÈS IMPROBABLE..1 (14%)
ASSEZ IMPROBABLE...2 (17%)
ASSEZ PROBABLE...3 (43%)
TRÈS PROBABLE..4 (24%)
SANS OPINION (RÉPONSE SPONTANÉE).................................5 (3%)

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13. De nombreuses compagnies américaines fermeront leurs usines au Canada.

TRÈS IMPROBABLE..1 (20%)
ASSEZ IMPROBABLE...2 (40%)
ASSEZ PROBABLE...3 (25%)
TRÈS PROBABLE..4 (14%)
SANS OPINION (RÉPONSE SPONTANÉE).........................5 (2%)

14. Notre économie deviendra tellement étroitement liée à l'économie américaine que nous perdrons progressivement notre capacité de prendre nos propres décisions d'ordre économique.

TRÈS IMPROBABLE..1 (14%)
ASSEZ IMPROBABLE...2 (24%)
ASSEZ PROBABLE...3 (29%)
TRÈS PROBABLE..4 (33%)
SANS OPINION (RÉPONSE SPONTANÉE).........................5 (1%)

15. Les Canadien(ne)s auront un revenu plus élevé qu'actuellement.

TRÈS IMPROBABLE..1 (29%)
ASSEZ IMPROBABLE...2 (43%)
ASSEZ PROBABLE...3 (20%)
TRÈS PROBABLE..4 (6%)
SANS OPINION (RÉPONSE SPONTANÉE).........................5 (2%)

16. Les régions plus pauvres du pays seraient dans une meilleure position si l'accord du libre-échange était adopté que s'il ne l'était pas.

TRÈS IMPROBABLE..1 (24%)
ASSEZ IMPROBABLE...2 (34%)
ASSEZ PROBABLE...3 (32%)
TRÈS PROBABLE..4 (8%)
SANS OPINION (RÉPONSE SPONTANÉE).........................5 (3%)

17. L'influence américaine sur nos livres, nos revues, nos films et sur d'autres traits de notre culture sera plus importante.

TRÈS IMPROBABLE..1 (9%)
ASSEZ IMPROBABLE...2 (23%)
ASSEZ PROBABLE...3 (37%)
TRÈS PROBABLE..4 (30%)
SANS OPINION (RÉPONSE SPONTANÉE).........................5 (2%)

18. Le Canada et les États-Unis deviendront plus semblables de bien des façons.

TRÈS IMPROBABLE..1 (8%)
ASSEZ IMPROBABLE...2 (16%)
ASSEZ PROBABLE...3 (43%)
TRÈS PROBABLE..4 (33%)
SANS OPINION (RÉPONSE SPONTANÉE).............................5 (1%)

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19. Les États-Unis s'en tiendront aux termes de l'entente.

TRÈS IMPROBABLE..1 (19%)
ASSEZ IMPROBABLE...2 (24%)
ASSEZ PROBABLE...3 (40%)
TRÈS PROBABLE..4 (15%)
SANS OPINION (RÉPONSE SPONTANÉE).............................5 (2%)

FIN DE L'ALTERNANCE

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20. Certains disent que nous ne devrions pas avoir le libre-échange parce que cela signifiera la fin de certaines mesures gouvernementales qui protègent l'identité du Canada et nous rendent différents des États-Unis.

D'autres disent que nous devrions être assez confiants au sujet du traité de libre-échange parce que l'identité du Canada est maintenant assez forte pour ne plus avoir besoin d'autant de protection par des mesures gouvernementales.

De ces deux points de vue, lequel correspond le plus au vôtre?

NE DEVRIONS PAS AVOIR LE LIBRE-ÉCHANGE.......................1 (45%)
DEVRIONS ÊTRE CONFIANTS.......................................2 (53%)
SANS OPINION (RÉPONSE SPONTANÉE).............................3 (2%)

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21. Certaines personnes disent que les emplois qui peuvent être créés par le libre-échange entre le Canada et les États-Unis ne sont pas aussi importants que la limitation de l'influence américaine sur l'économie canadienne.

D'autres disent que les emplois qui peuvent être créés par la libéralisation des échanges entre le Canada et les États-Unis sont plus importants que la limitation de l'influence américaine sur l'économie canadienne.

De ces deux points de vue, lequel correspond le plus au vôtre?

LES EMPLOIS NE SONT PAS AUSSI IMPORTANTS QUE
LA LIMITATION DE L'INFLUENCE..............................1 (36%)
LES EMPLOIS SONT PLUS IMPORTANTS QUE
LA LIMITATION DE L'INFLUENCE..............................2 (56%)
SANS OPINION (RÉPONSE SPONTANÉE)..............................3 (8%)
SANS OPINION..............................4 (1%)

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22. Certains disent que l'accord de libre-échange va renforcer l'économie canadienne et lui permettra ainsi de continuer à jouer un rôle indépendant sur la scène mondiale.

D'autres disent que l'accord de libre-échange liera si fortement le Canada aux États-Unis que notre capacité de jouer un rôle indépendant sur la scène mondiale sera affaiblie.

De ces deux points de vue, lequel correspond le plus au vôtre?

RENFORCERA LA CAPACITÉ DE JOUER UN RÔLE INDÉPENDANT..............1 (42%)
AFFAIBLIRA LA CAPACITÉ DE JOUER UN RÔLE INDÉPENDANT..............2 (56%)
SANS OPINION (RÉPONSE SPONTANÉE)..............................3 (2%)

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23. En pensant aux différentes personnes dont vous respectez l'opinion sur l'accord de libre-échange, sur l'opinion de qui vous basez-vous le plus pour vous faire une idée sur l'accord de libre-échange depuis sa signature...les économistes et autres spécialistes, les chefs d'entreprises, les chefs syndicaux, les dirigeants du gouvernement fédéral, les dirigeants de votre gouvernement provincial ou les médias d'information?

LES ÉCONOMISTES ET AUTRES SPÉCIALISTES..............................1 (22%)
LES CHEFS D'ENTREPRISES..............................2 (15%)
LES CHEFS SYNDICAUX..............................3 (9%)
LES DIRIGEANTS DU GOUVERNEMENT FÉDÉRAL..............................4 (10%)
LES DIRIGEANTS DE VOTRE GOUVERNEMENT PROVINCIAL..............................5 (7%)
LES MÉDIAS D'INFORMATION..............................6 (31%)
SANS OPINION (RÉPONSE SPONTANÉE)..............................7 (6%)

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24. En pensant spécifiquement aux chefs d'entreprises, sur l'opinion de qui vous basez-vous ou vous fiez-vous le plus pour vous faire une idée sur le libre-échange...les gens qui dirigent des entreprises bien connues à travers le Canada, ou les gens qui dirigent des entreprises surtout connues dans la région où vous vivez?

ENTREPRISES BIEN CONNUES À TRAVERS LE CANADA	1	(61%)
ENTREPRISES SURTOUT CONNUES LOCALEMENT	2	(33%)
SANS OPINION (RÉPONSE SPONTANÉE)	3	(5%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(1%)

Je vais maintenant vous lire une liste de déclarations que diverses personnes ont faites à un moment ou à un autre, et je voudrais que vous m'indiquiez ce que vous pensez personnellement de chacune de ces déclarations, en me donnant un chiffre de +5 à -5. Une note de -5 veut dire que vous êtes en désaccord complet avec la déclaration et +5 que vous êtes tout à fait d'accord avec cette déclaration. L'opinion de la plupart des gens se situe quelque part entre ces deux extrêmes, selon ce qu'ils en pensent. Voici la première déclaration...(ALTERNEZ L'ORDRE DES DÉCLARATIONS 25 À 34...LISEZ LA PREMIÈRE...RÉPÉTEZ LES EXPLICATIONS SUR L'ÉCHELLE SI NÉCESSAIRE.) Où vous situez-vous sur cette échelle?

DÉSACCORD COMPLET — CELA DÉPEND — TOUT À FAIT D'ACCORD

-5 -4 -3 -2 -1 0 +1 +2 +3 +4 +5

	ÉVALUATION
25. Le Canada deviendra peut-être plus semblable aux États-Unis dans certains secteurs, mais les Canadien(ne)s eux-mêmes/elles-mêmes ne deviendront pas comme les Américain(e)s par suite du libre-échange.	1.58
26. Je suis convaincu(e) que le gouvernement apportera suffisamment d'aide à ceux/celles qui sont affectés négativement par les effets du libre-échange.	-0.69
27. D'après ce que j'ai lu ou entendu, le Canada en a trop donné aux Américains dans le traité de libre-échange.	1.22
28. Le gouvernement fédéral a offert assez de renseignements aux Canadiens sur l'accord de libre-échange.	-1.82

29.	Toutes les discussions au sujet du libre-échange peuvent avoir de l'importance pour les entreprises, mais le libre-échange ne fera aucune différence pour le travailleur/la travailleuse canadien(ne) ordinaire.	-1.05
30.	La chose importante maintenant est de commencer à planifier comment profiter des nouvelles occasions que le libre-échange peut procurer.	2.04
31.	Je vois le traité de libre-échange avec les Américains comme faisant partie de l'ensemble des efforts faits par le gouvernement pour améliorer la situation commerciale du Canada avec les autres pays du monde.	1.02
32.	Je crains que le libre-échange ne fasse qu'accroître les tensions entre différentes régions et différents groupes au Canada.	0.81
33.	À la longue, l'accord de libre-échange entre le Canada et les États-Unis aidera à garantir l'avenir économique du Canada.	0.38
34.	Je crois que le gouvernement a une bonne idée des moyens à prendre pour réagir aux changements qu'entraînera le traité de libre-échange au Canada.	-0.21

FIN DE L'ALTERNANCE

Maintenant, je vais vous énumérer certaines entreprises canadiennes et j'aimerais que vous me disiez, pour chacune d'elles, si vous croyez que l'accord de libre-échange avec les États-Unis signifiera que cette industrie connaîtra une meilleure situation ou une situation pire dans le futur. Qu'en est-il...(LISEZ ET ALTERNEZ L'ORDRE DE Q35 - 42)

35. De l'industrie du pétrole et du gaz?

SITUATION PIRE	1	(32%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(10%)
SITUATION MEILLEURE	3	(56%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(2%)

36. De l'industrie du vin?

SITUATION PIRE	1	(55%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(13%)
SITUATION MEILLEURE	3	(30%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(2%)

37. Des produits du bois et du papier?

SITUATION PIRE	1	(45%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(7%)
SITUATION MEILLEURE	3	(47%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(1%)

38. Des pêcheries et des produits de la pêche?

SITUATION PIRE	1	(43%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(12%)
SITUATION MEILLEURE	3	(43%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(2%)

39. De l'agriculture et de l'élevage?

SITUATION PIRE	1	(56%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(9%)
SITUATION MEILLEURE	3	(33%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(2%)

40. De l'automobile et des pièces d'automobiles?

SITUATION PIRE	1	(42%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE)	2	(12%)
SITUATION MEILLEURE	3	(44%)
SANS OPINION (RÉPONSE SPONTANÉE)	4	(2%)

41. Du cinéma, des livres et des revues?

SITUATION PIRE..1 (46%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE).............2 (13%)
SITUATION MEILLEURE...3 (40%)
SANS OPINION (RÉPONSE SPONTANÉE)................................4 (2%)

42. De l'industrie de la bière?

SITUATION PIRE..1 (45%)
NE SERAIT PAS INFLUENCÉE (RÉPONSE SPONTANÉE).............2 (17%)
SITUATION MEILLEURE...3 (36%)
SANS OPINION (RÉPONSE SPONTANÉE)................................4 (2%)

FIN DE L'ALTERNANCE

43. Si l'accord de libre-échange profitait au Canada dans son ensemble, mais que votre propre province en profitait moins que le reste du Canada, seriez-vous fortement favorable, favorable, opposé(e), ou fortement opposé(e) à l'accord?

FORTEMENT OPPOSÉ(E)...1 (23%)
OPPOSÉ(E)...2 (35%)
FAVORABLE...3 (35%)
FORTEMENT FAVORABLE...4 (6%)
SANS OPINION (RÉPONSE SPONTANÉE)................................5 (2%)

Lors des discussions sur l'accord de libre-échange entre le Canada et les États-Unis, on parle d'enjeux comme les ajustements ou les changements que des personnes, des entreprises ou des secteurs industriels du Canada auront peut-être à faire lorsque l'accord de libre-échange deviendra une loi...

D'après ce que vous pouvez avoir vu, lu ou entendu, pensez-vous que...(LISEZ LES Q44 ET 45 EN ALTERNANT L'ORDRE) auront besoin de beaucoup d'aide, de passablement d'aide, d'un peu d'aide seulement, ou d'aucune aide du gouvernement fédéral pour s'adapter aux effets de l'accord de libre-échange?

44. Les entreprises canadiennes?

AUCUNE AIDE DU GOUVERNEMENT FÉDÉRAL	1	(8%)
UN PEU D'AIDE SEULEMENT DU GOUVERNEMENT FÉDÉRAL	2	(19%)
PASSSABLEMENT D'AIDE DU GOUVERNEMENT FÉDÉRAL	3	(43%)
BEAUCOUP D'AIDE DU GOUVERNEMENT FÉDÉRAL	4	(29%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(1%)

45. Les Canadien(ne)s eux-mêmes/elles-mêmes?

AUCUNE AIDE DU GOUVERNEMENT FÉDÉRAL	1	(15%)
UN PEU D'AIDE SEULEMENT DU GOUVERNEMENT FÉDÉRAL	2	(23%)
PASSSABLEMENT D'AIDE DU GOUVERNEMENT FÉDÉRAL	3	(36%)
BEAUCOUP D'AIDE DU GOUVERNEMENT FÉDÉRAL	4	(25%)
SANS OPINION (RÉPONSE SPONTANÉE)	5	(1%)

FIN DE L'ALTERNANCE

Au meilleur de votre connaissance, est-ce que le gouvernement fédéral fournira assez d'aide...(LISEZ LES Q46 ET 47 EN ALTERNANT L'ORDRE) qui seront peut-être affectés négativement par l'accord de libre-échange entre le Canada et les États-Unis?

46. Aux entreprises canadiennes?

OUI	1	(42%)
NON	2	(49%)
SANS OPINION (RÉPONSE SPONTANÉE)	3	(8%)
SANS OPINION	4	(1%)

47. Aux Canadien(ne)s eux-mêmes?

OUI	1	(35%)
NON	2	(55%)
SANS OPINION (RÉPONSE SPONTANÉE)	3	(9%)
SANS OPINION	4	(1%)

FIN DE L'ALTERNANCE

SI LA RÉPONSE À Q44 EST "AUCUNE AIDE DU GOUVERNEMENT FÉDÉRAL" (CODE 1)...PASSEZ À Q49; SINON, DEMANDEZ :

Si vous pensez spécifiquement aux entreprises...

48. Le gouvernement fédéral peut les aider à tirer avantage des occasions offertes par l'accord de libre-échange entre le Canada et les États-Unis en fournissant différentes formes d'aide. Laquelle des formes d'aide suivantes aux entreprises préféreriez-vous le plus que le gouvernement fédéral fournisse?

DONNER DES RENSEIGNEMENTS ET DES CONSEILS SUR LES NOUVELLES OCCASIONS DE FAIRE DES AFFAIRES AUX ÉTATS-UNIS.........................1 (41%)

OU

COOPÉRER AVEC LES ENTREPRISES POUR PARTAGER LES FRAIS ENCOURUS POUR TROUVER DES NOUVEAUX CLIENTS AUX ÉTATS-UNIS..............................2 (55%)

SANS OPINION (RÉPONSE SPONTANÉE)..........................3 (4%)

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49. Si l'accord de libre-échange entre le Canada et les États-Unis n'aboutit pas et n'est pas adopté par le Parlement canadien et le Congrès américain, lequel des points de vue suivants serait le plus près du vôtre...(ALTERNEZ L'ORDRE)

VOUS SERIEZ DÉRANGÉ(E) PAR LE FAIT QUE LE CANADA A GASPILLÉ TOUT CE TEMPS ET TOUTE CETTE ÉNERGIE POUR ESSAYER DE CONCLURE CET ACCORD........................1 (18%)

VOUS PENSERIEZ QU'IL EN VALAIT LA PEINE D'ESSAYER D'AMÉLIORER LES PERSPECTIVES ÉCONOMIQUES DU CANADA MÊME SI CELA N'A PAS RÉUSSI...............................2 (41%)

VOUS SERIEZ TRÈS HEUREUX/HEUREUSE ET SOULAGÉ(E) PARCE QUE VOUS PENSEZ QUE LE LIBRE-ÉCHANGE NE SERAIT PAS UNE BONNE AFFAIRE POUR LE CANADA.............3 (19%)

VOUS SERIEZ CONTENT(E) PARCE QUE CET ACCORD DE LIBRE-ÉCHANGE EN PARTICULIER N'EST PAS UNE ASSEZ BONNE AFFAIRE POUR LE CANADA......................4 (21%)

SANS OPINION (RÉPONSE SPONTANÉE)...............................5 (2%)

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50. Une fois de plus, si l'accord de libre-échange entre le Canada et les États-Unis n'entrait pas en vigueur, lequel des facteurs suivants, d'après vous, serait le plus responsable du fait que l'accord n'a pas abouti...(ALTERNEZ)

PAS ASSEZ DE CHEFS POLITIQUES CANADIENS NE POUVAIENT CONVENIR QUE C'EST UN BON ACCORD....................1 (21%)

PAS ASSEZ DE CHEFS POLITIQUES AMÉRICAINS NE POUVAIENT CONVENIR QUE C'EST UN BON ACCORD....................2 (23%)

NI LES CHEFS POLITIQUES CANADIENS NI LES CHEFS POLITIQUES AMÉRICAINS NE POUVAIENT CONVENIR QUE L'ACCORD DE LIBRE-ÉCHANGE EST UN BON ACCORD....................3 (55%)

SANS OPINION (RÉPONSE SPONTANÉE)....................4 (2%)

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51. L'accord de libre-échange doit devenir une loi d'ici la fin de l'année ou il n'entrera pas en vigueur.

Certaines personnes disent que cela donne assez de temps et qu'une décision finale devrait être prise afin d'accepter l'accord ou de le refuser, vu qu'il y a eu suffisamment de discussions publiques sur cet enjeu et ses conséquences possibles.

D'autres disent que les conséquences de l'accord de libre-échange sont tellement importantes que nous devrions prendre autant de temps que nécessaire pour avoir d'autres discussions même si cela signifie manquer la date limite et laisser tomber l'accord.

Quand vous pensez à ces deux points de vue, lequel reflète le mieux le vôtre?

UNE DÉCISION FINALE DEVRAIT ÊTRE PRISE AFIN D'ACCEPTER L'ACCORD VU QU'IL Y A EU SUFFISAMMENT DE DISCUSSIONS PUBLIQUES SUR CET ENJEU....................1 (32%)

LES CONSÉQUENCES SONT TELLEMENT IMPORTANTES QUE NOUS DEVRIONS PRENDRE AUTANT DE TEMPS QUE NÉCESSAIRE POUR AVOIR D'AUTRES DISCUSSIONS....................2 (67%)

SANS OPINION (RÉPONSE SPONTANÉE)....................3 (1%)

Ce sondage est effectué pour le compte du ministère des Affaires extérieures. Afin de nous permettre de classer vos réponses, nous aimerions que vous répondiez à quelques questions d'ordre purement statistique. Nous désirons vous assurer que vos réponses seront tenues strictement confidentielles, de deux façons. D'abord, votre nom ne sera pas divulgué au ministère des Affaires extérieures. Deuxièmement, vos réponses seront combinées à celles des autres participant(e)s au sondage avant d'être remises au ministère des Affaires extérieures. Ce sondage est enregistré en vertu de la Loi sur l'accès à l'information et de la Loi sur la protection des renseignements personnels.

52. Quel âge avez-vous, s'il vous plaît? (SI LE/LA RÉPONDANT(E) REFUSE DE RÉPONDRE, OFFREZ-LUI DE LIRE LES CATÉGORIES AFIN QU'IL/ELLE PUISSE VOUS DIRE OÙ L'INSCRIRE).

18-19 ANS	01	(4%)
20-24 ANS	02	(10%)
25-29 ANS	03	(14%)
30-34 ANS	04	(14%)
35-39 ANS	05	(13%)
40-44 ANS	06	(11%)
45-49 ANS	07	(8%)
50-54 ANS	08	(6%)
55-59 ANS	09	(5%)
60-64 ANS	10	(5%)
65 ANS OU PLUS	11	(11%)

53. Dans quelle catégorie puis-je inscrire le revenu annuel de votre <u>foyer</u>? (LISEZ LA LISTE)

MOINS DE 5 000 $	01	(2%)
5 000 $ - 9 999 $	02	(5%)
10 000 $ - 14 999 $	03	(8%)
15 000 $ - 19 999 $	04	(10%)
20 000 $ - 24 999 $	05	(11%)
25 000 $ - 29 999 $	06	(12%)
30 000 $ - 34 999 $	07	(11%)
35 000 $ - 39 999 $	08	(8%)
40 000 $ - 44 999 $	09	(8%)
45 000 $ - 49 999 $	10	(6%)
50 000 $ ET PLUS	11	(19%)

54.A Fréquentez-vous actuellement une école, un collège, ou une université en tant qu'étudiant(e) à plein temps?

OUI (PASSEZ À Q55)............6* (7%)
NON (ALLEZ À Q54B)............A

SI "NON" À Q54A, DEMANDEZ :

54.B Quel est le niveau de scolarité le plus élevé que vous ayez atteint?

ÉCOLE PUBLIQUE/PRIMAIRE (ANNÉES 1 À 8)	1	(7%)
QUELQUES ANNÉES D'ÉCOLE SECONDAIRE	2	(20%)
DIPLÔME D'ÉTUDES SECONDAIRES (ANNÉES 12 OU 13)	3	(27%)
COLLÈGE PROFESSIONNEL/TECHNIQUE/CÉGEP	4	(17%)
QUELQUES ANNÉES D'UNIVERSITÉ	5	(7%)
DIPLÔME UNIVERSITAIRE	7	(16%)

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55. Travaillez-vous présentement hors de chez vous?

NON (PASSEZ À Q58)	1*	(33%)
OUI (ALLEZ À Q56)	2	(67%)
SANS OPINION (RÉPONSE SPONANÉE)	3	(1%)

SI "OUI" À Q55, DEMANDEZ :

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56. Travaillez-vous à plein temps ou à temps partiel?

PLEIN TEMPS	1	(83%)
TEMPS PARTIEL	2	(17%)
SANS OPINION (RÉPONSE SPONANÉE)	3	(1%)

57. Quelle est votre occupation, c'est-à-dire quelles sont vos principales responsabilités au travail? Pour quel genre de compagnie travaillez-vous?

DOMAINE PROFESSIONNEL	01	(11%)
AGRICULTURE	02	(4%)
FONCTIONNAIRE	03	(5%)
PROPRIÉTAIRE/À SON COMPTE	04	(9%)
DIRECTEUR(TRICE)/CADRE	05	(8%)
DOMAINE CULTUREL	06	(1%)
ENSEIGNEMENT	07	(6%)
SERVICES - NIVEAU INTERMÉDIAIRE	08	(10%)
SERVICES - NIVEAU INFÉRIEUR	09	(14%)
TRAVAIL DE BUREAU - NIVEAU INTERMÉDIAIRE	10	(10%)
TRAVAIL DE BUREAU - NIVEAU INFÉRIEUR	11	(4%)
TRAVAIL DE PRODUCTION - NIVEAU INTERMÉDIAIRE	12	(10%)
TRAVAIL DE PRODUCTION - NIVEAU INFÉRIEUR	13	(5%)
MÉNAGÈRE	14	(*)
ÉTUDIANT(E)	15	(0%)
RETRAITÉ(E)	16	(0%)
ARMÉE	17	(*)
CHÔMEUR(SE)	18	(0%)
DOMAINE SCIENTIFIQUE/TECHNIQUE	19	(4%)

58. Est-ce que vous ou un membre de votre famille faites partie d'un syndicat?

RÉPONDANT(E)	1	(14%)
AUTRE MEMBRE DE LA FAMILLE	2	(17%)
LES DEUX (RÉPONSE SPONTANÉE)	3	(4%)
AUCUN (RÉPONSE SPONTANÉE)	4	(65%)

59. Sexe. (D'APRÈS VOTRE OBSERVATION)

MASCULIN	1	(50%)
FÉMININ	2	(50%)

60. Langue. (D'APRÈS VOTRE OBSERVATION)

ANGLAIS	1	(76%)
FRANÇAIS	2	(24%)

In order to validate the sample, we compared our data for the age, categories of the population with figures provided by Statistics Canada. Table B outlines the percentage of respondents in each age, category for the sample, and the corresponding population figures. As these figures suggest, the sample drawn for this study reflects the more general characteristics of the adult population.

Table B

SAMPLE VALIDATION

	SAMPLE (n=1,500) %	UNIVERSE [1] (N=18, 759, 685) %
AGE		
18-19 years of age	4	4
20-24 years of age	10	12
25-29 years of age	14	13
30-34 years of age	14	12
35-39 years of age	13	11
40-44 years of age	11	9
45-49 years of age	8	7
50-54 years of age	6	7
55-59 years of age	5	6
60-64 years of age	5	6
65 years and olders	11	14

[1] Adult population of Canada. Source: 1981 Census of Canada Catalogue 93-101, Age, Sex and Marital Status p. 4-2 to 4-6.

It should be noted that the sample is only representative of residents in the provinces who have direct dialing telephone services. Therefore, Canadians who are accessible only by a telephone servicing a large number of people, such as senior citizen homes, hospitals, and Indian Reserves, and those who have only radio-telephone service or no telephone service at all, are automatically excluded from the sample. Any further questions the reader has about sampling should be referred to the Research Consultant.

While the most sophisticated procedures have been used to collect and analyse the information presented herein, it must be remembered that surveys are not predictions. They are designed to measure public opinion within identifiable statistical limits of accuracy at specific points in time. This survey is in no way a prediction of opinion or behaviour at any future point in time.

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