

TRADE CROSSROADS

An exploration of Americans' views of NAFTA



August 2017

LIVINGSTON
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Study Methodology

- The survey was conducted online by Harris Poll on behalf of Livingston International June 28-30, 2017
- 2,264 U.S. adults ages 18 and older polled
 - 184 Blue Collar Workers*
 - 358 White Collar Workers**
 - 1,169 Unemployed***
 - 1,095 Employed

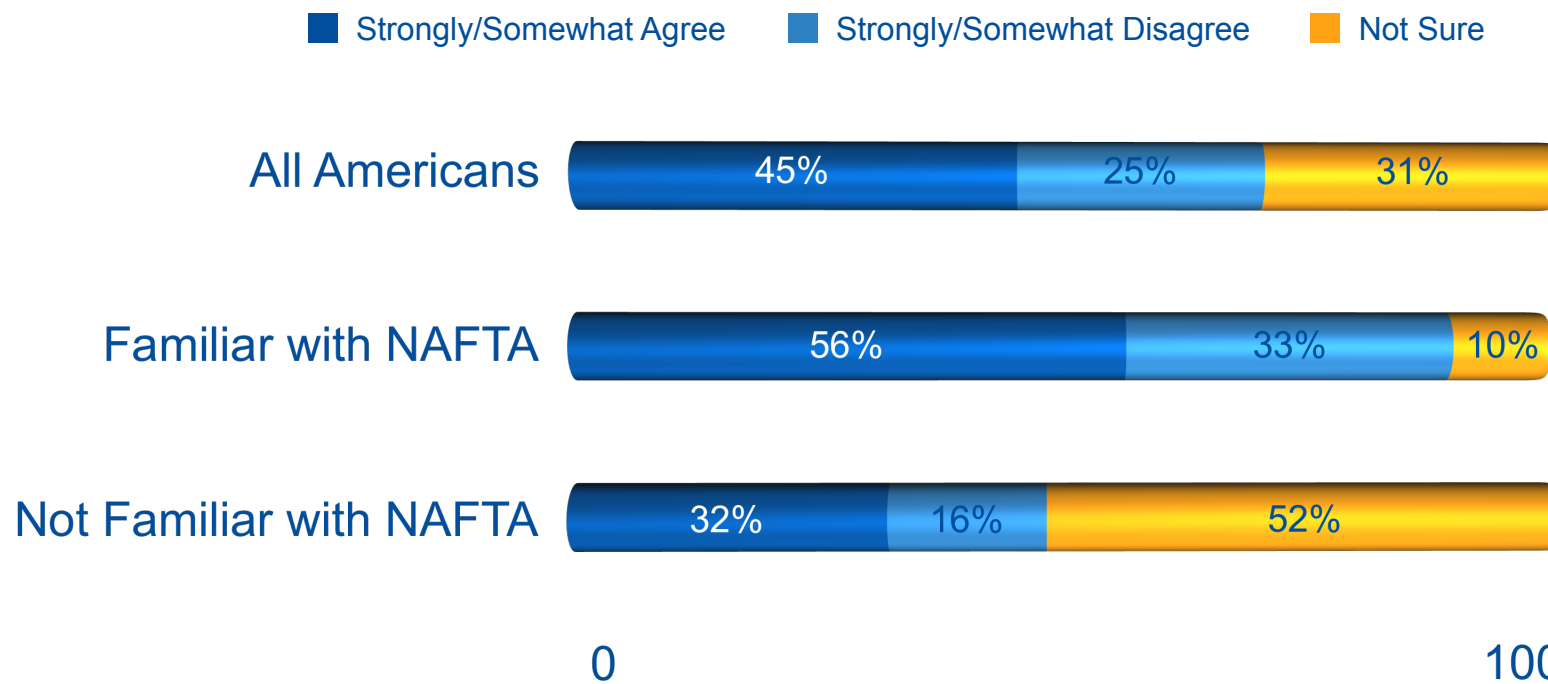
* Blue Collar workers are defined as employed Americans who work in agriculture/ agrifood, apparel, automotive, construction/infrastructure, energy/natural resources, food processing/manufacturing, or transportation/logistics

** White Collar workers are defined as employed Americans who work in health care/ pharma, professional/financial services, or IT/telecommunications

*** Unemployed is defined as Americans who are not currently employed full-time, part-time, or self-employed.

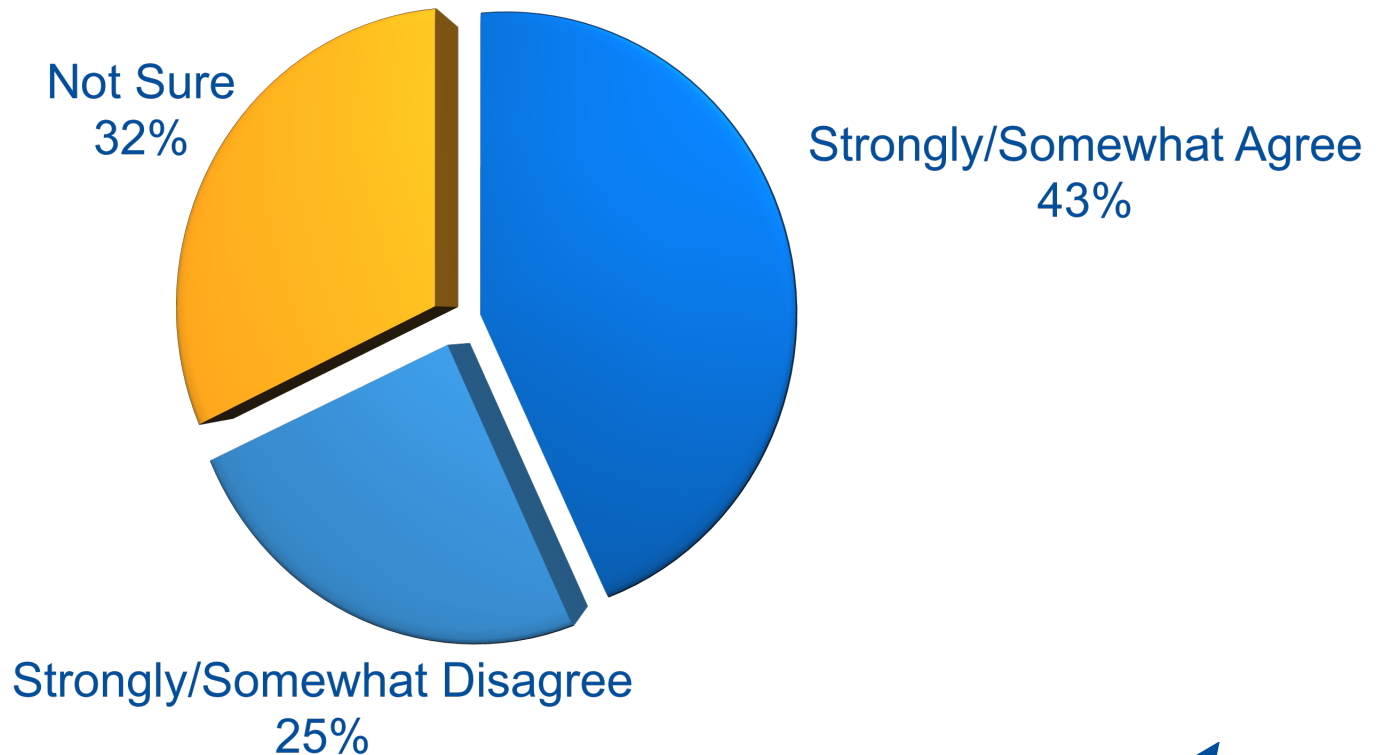
A majority of Americans familiar with NAFTA (56%) believe it has contributed to economic growth; one-third disagree

NAFTA has greatly influenced growth in the U.S. economy over the past 20 years



Almost half of Americans (43%) believe NAFTA has contributed to the growth of the knowledge economy

NAFTA has played an influential role in the growth of America's knowledge economy



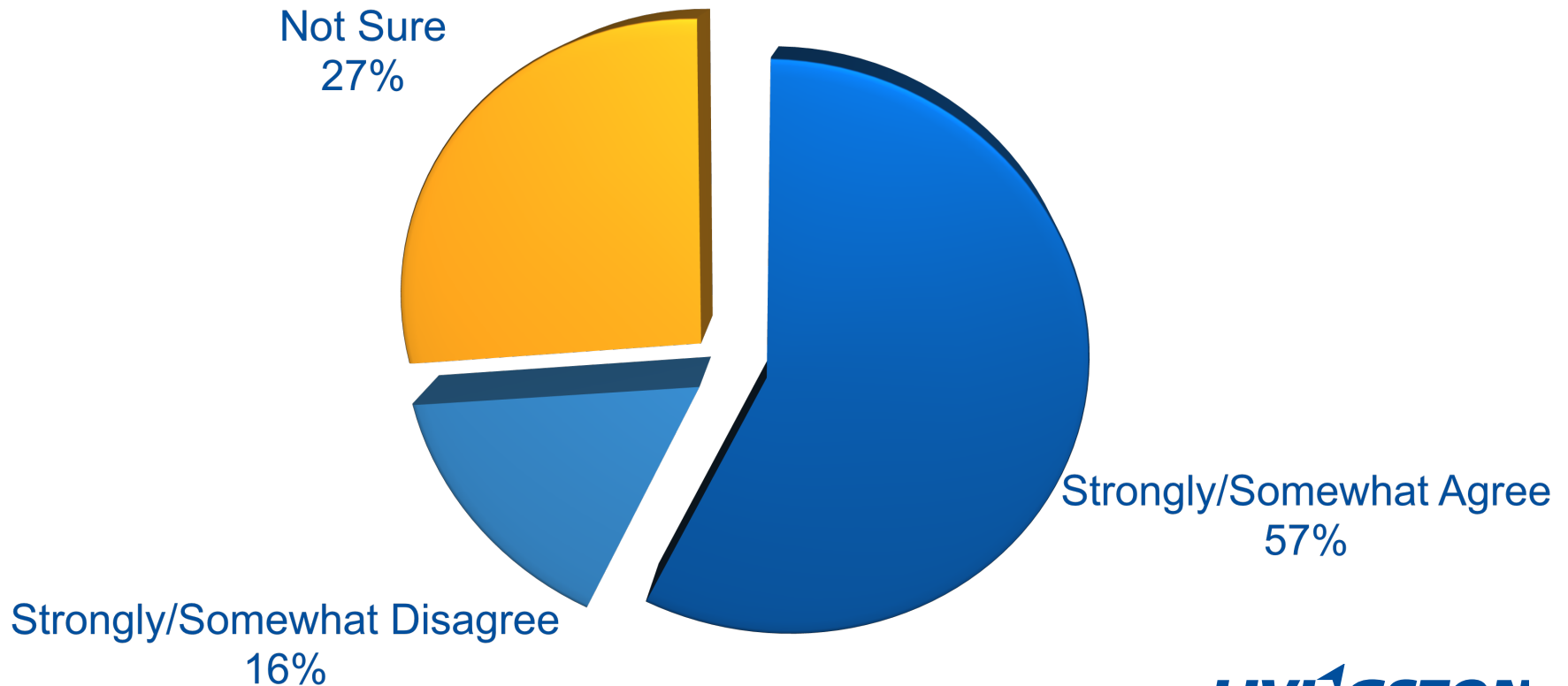
How much do you agree or disagree with each of the following statements about NAFTA?

NAFTA has played an influential role in the growth of America's knowledge economy (i.e., professional services, engineering, biotech, information technology, etc.).

Base: All Respondents (n=2,264)

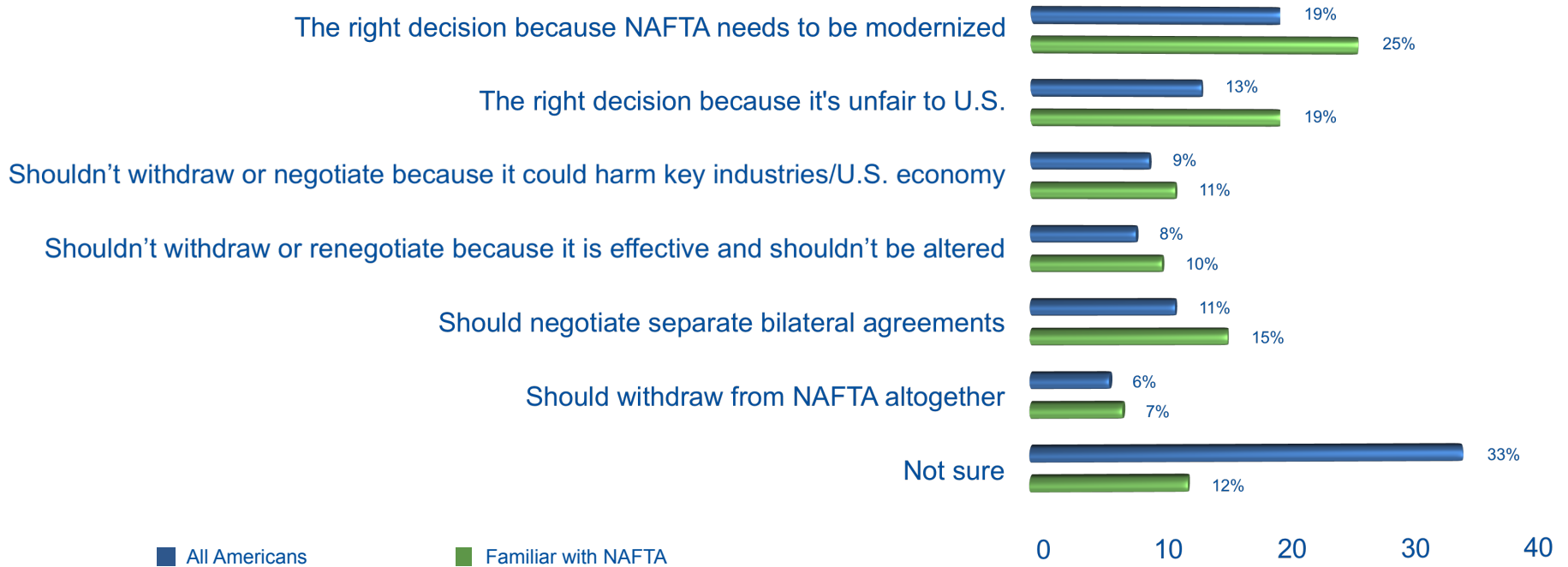
Majority of Americans (57%) believe a NAFTA withdrawal will lead to inflation; majority increases to 69% among those familiar with NAFTA

A U.S. withdrawal from NAFTA will likely result in the price of everyday goods going up



Less than 1 in 10 of both Americans overall (6%) and those familiar with NAFTA (7%) believe the U.S. should withdraw from the agreement; about one-third of all Americans (32%) and 44% of those familiar with NAFTA believe the USTR made the right choice to renegotiate, but only 13% and 19% respectively believe the agreement is unfair to the U.S.

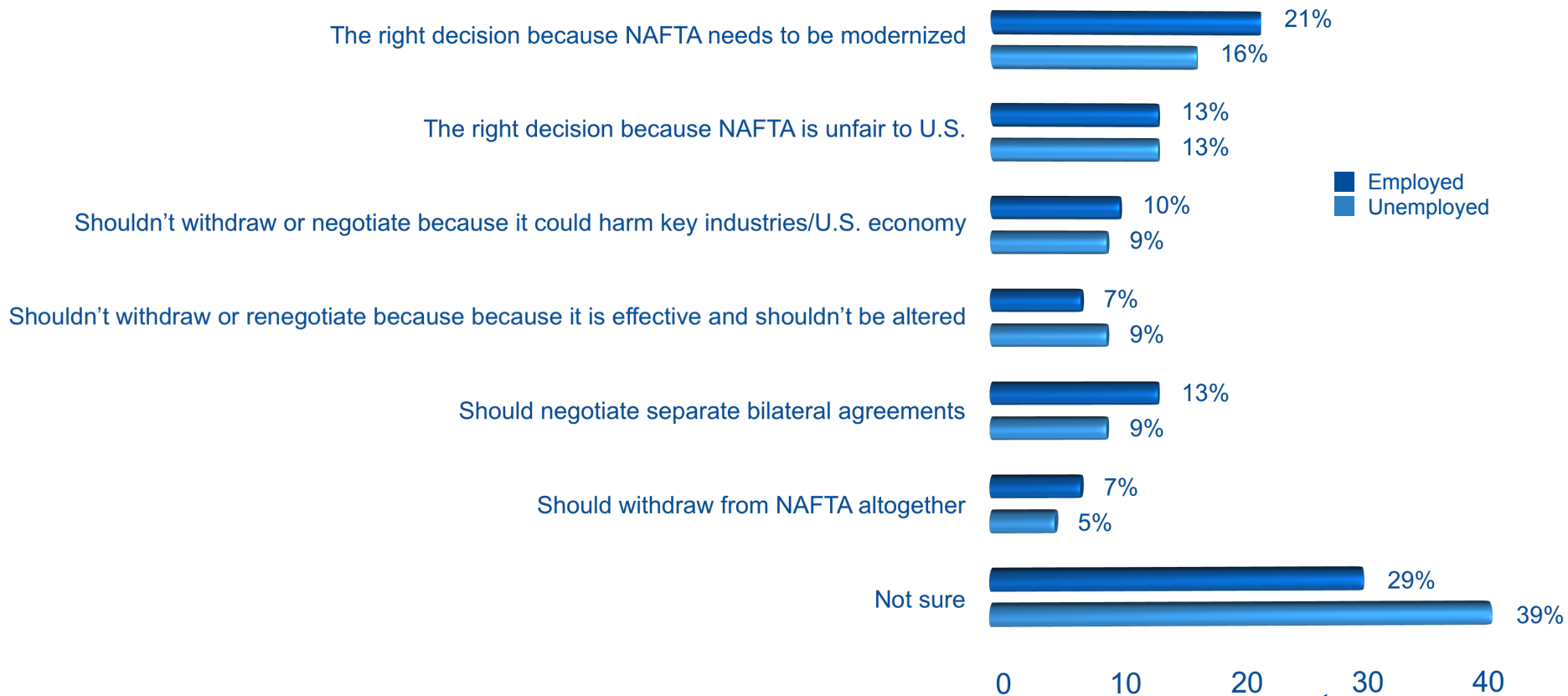
How do you feel about the USTR decision to renegotiate NAFTA?



U.S. trade representative Robert Lighthizer has given Congress notice that the U.S. intends to renegotiate the terms of NAFTA. Which one of the following statements best describes your opinion on this decision? Base: All Respondents (n=2,264), Very/Somewhat Familiar With NAFTA (n=1,164)

While 39% of unemployed Americans aren't sure whether the USTR made the right choice to renegotiate NAFTA, the bulk of those who think it was the right choice thinks so because it's an opportunity to modernize the agreement

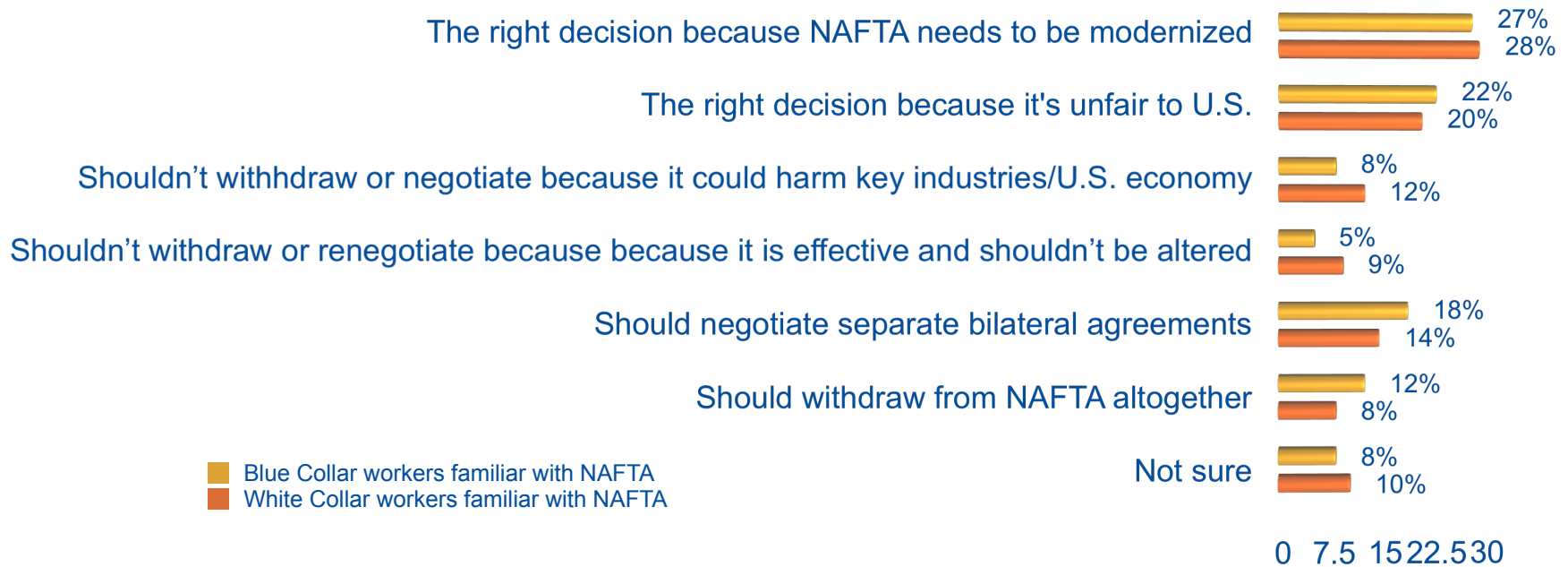
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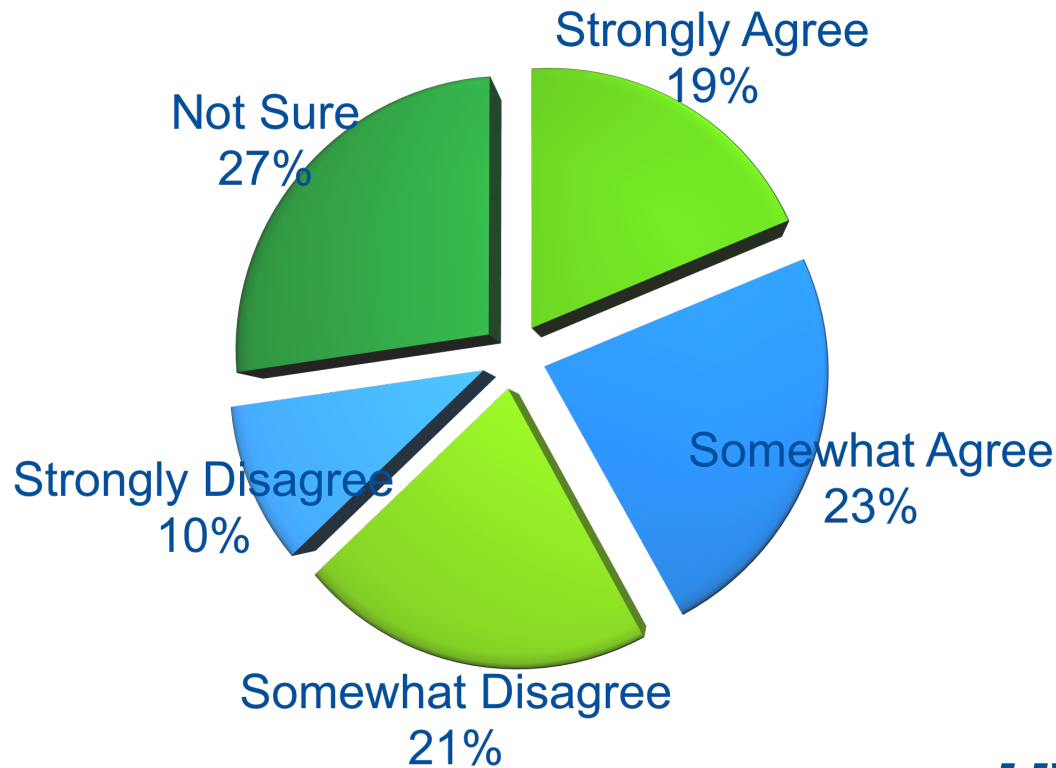
Less than one quarter of blue collar workers who are familiar with NAFTA (22%) believe the trade deal is unfair to the U.S. and only 12% believe the U.S. should withdraw altogether

How do you feel about the USTR decision to renegotiate NAFTA?



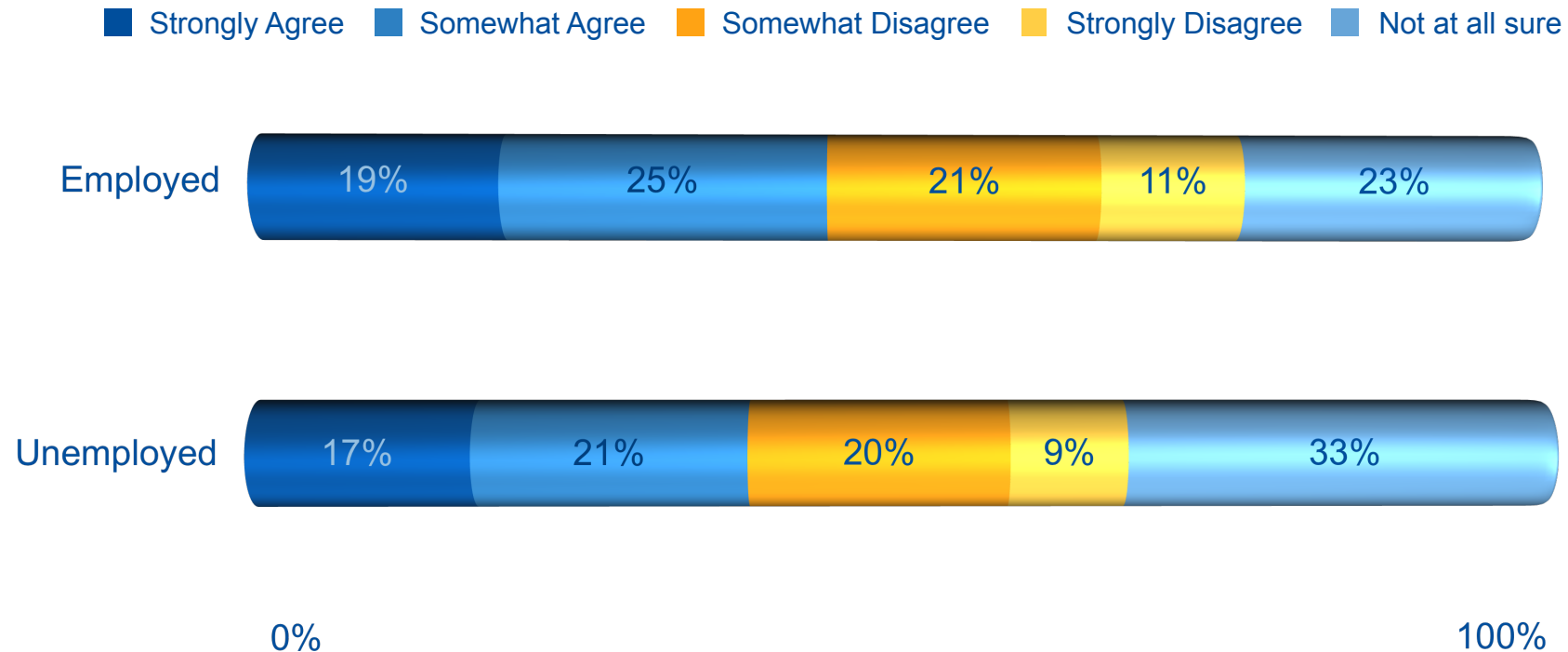
Less than half of Americans (42%) hold NAFTA accountable for lost manufacturing jobs

NAFTA is primarily responsible for the loss of American manufacturing jobs to other countries



Less than half of unemployed Americans (44%) hold NAFTA accountable for lost manufacturing jobs

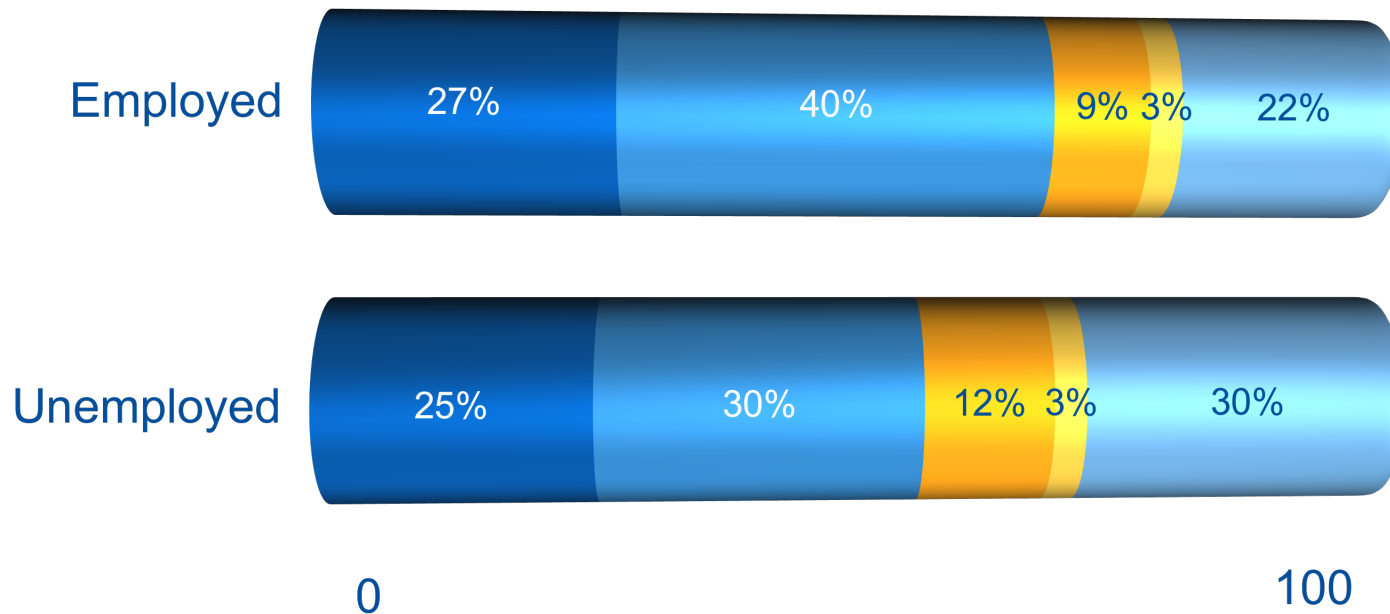
NAFTA is primarily responsible for the loss of American manufacturing jobs to other countries



Majority of employed and unemployed Americans see NAFTA as just one of many contributing factors to the loss of manufacturing jobs

NAFTA is just one of many factors responsible for the loss of American manufacturing jobs to other countries

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree ■ Not at all sure



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How much do you agree or disagree with each of the following statements about NAFTA?

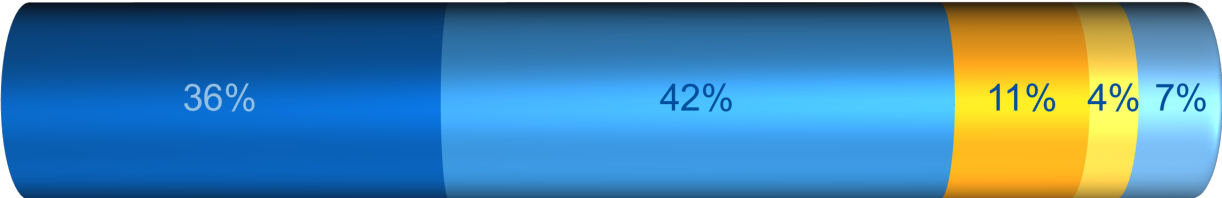
NAFTA is just *one of many factors* responsible for the loss of American manufacturing jobs (i.e., jobs related to the production of specific products such as automobiles, clothing, appliances, etc.) to workers in other countries. Base: Employed (n=1,095) and Unemployed (n=1,169)

Far more Americans familiar with NAFTA agree the trade deal is just one of many factors contributing to the flight of manufacturing jobs than agree it is a primary cause (78% vs. 50%)

NAFTA is just one of many factors responsible for the loss of American manufacturing jobs to other countries

■ Strongly Agree ■ Somewhat Agree ■ Somewhat Disagree ■ Strongly Disagree ■ Not at all sure

Familiar with NAFTA



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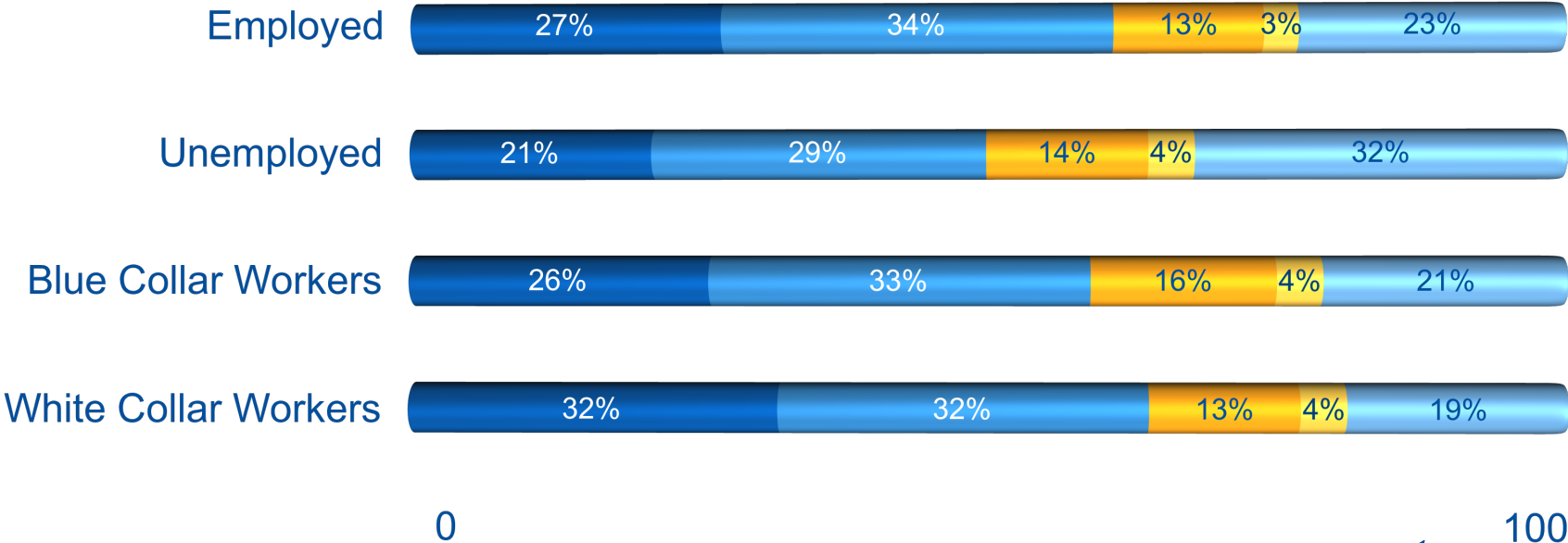
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How much do you agree or disagree with each of the following statements about NAFTA?
NAFTA is just *one of many factors* responsible for the loss of American manufacturing jobs (i.e., jobs related to the production of specific products such as automobiles, clothing, appliances, etc.,) to workers in other countries.]
NAFTA is primarily responsible for the loss of American manufacturing jobs (i.e., jobs related to the production of specific products such as automobiles, clothing, appliances, etc.,) to workers in other countries Base: Very/Somewhat Familiar With NAFTA (n=1,164)

Majority of Americans (56%) and half of unemployed Americans (50%) see technological advancements, such as automation and robotics, as playing a larger role than NAFTA in the loss of manufacturing jobs

Technological advancements have played a greater role than NAFTA in the loss of American manufacturing jobs

■ Strongly Agree
 ■ Somewhat Agree
 ■ Somewhat Disagree
 ■ Strongly Disagree
 ■ Not at all sure

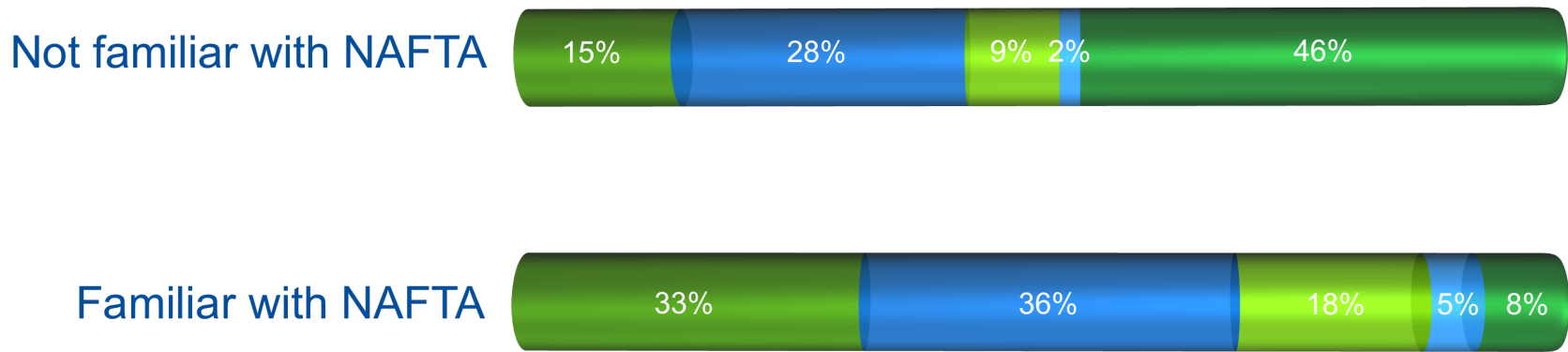


How much do you agree or disagree with each of the following statements about NAFTA?
 Technological advancements, such as automation and robotics, have played a greater role than NAFTA in the loss of American manufacturing jobs (i.e., jobs related to the production of specific products such as automobiles, clothing, appliances, etc.). Base: Employed (n=1,095), Unemployed (n=1,169), Blue Collar Workers (n=184), and White Collar Workers (n=358)

More than two-thirds of those familiar with NAFTA (67%) believe technological advancement has played a greater role in the loss of manufacturing jobs than NAFTA

Technological advancements have played a greater role than NAFTA in the loss of American manufacturing jobs

■ Strongly Agree
 ■ Somewhat Agree
 ■ Somewhat Disagree
 ■ Strongly Disagree
 ■ Not at all sure



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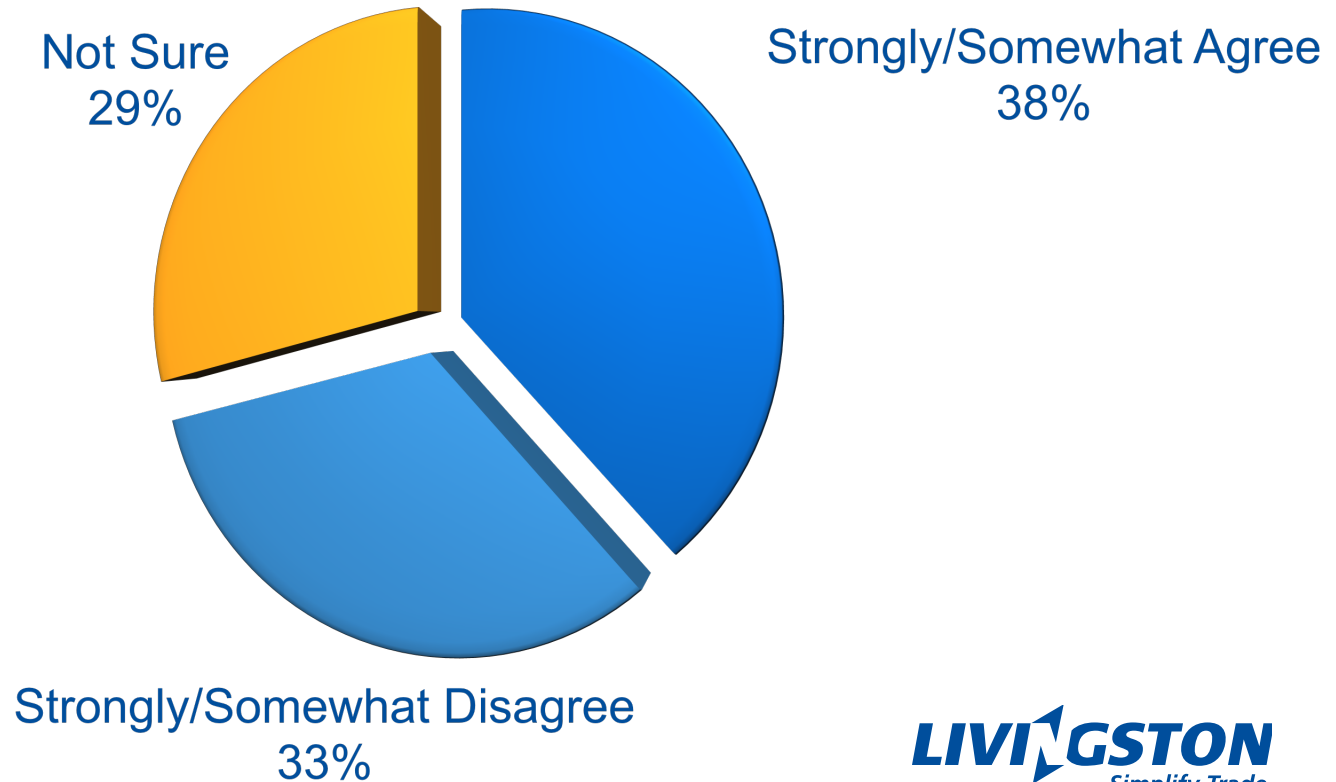


How much do you agree or disagree with each of the following statements about NAFTA?

Technological advancements, such as automation and robotics, have played a greater role than NAFTA in the loss of American manufacturing jobs (i.e., jobs related to the production of specific products such as automobiles, clothing, appliances, etc.). Base: Very/Somewhat Familiar With NAFTA (n=1,164) and Never Heard Of NAFTA/Only Know The Name (n=1,100)

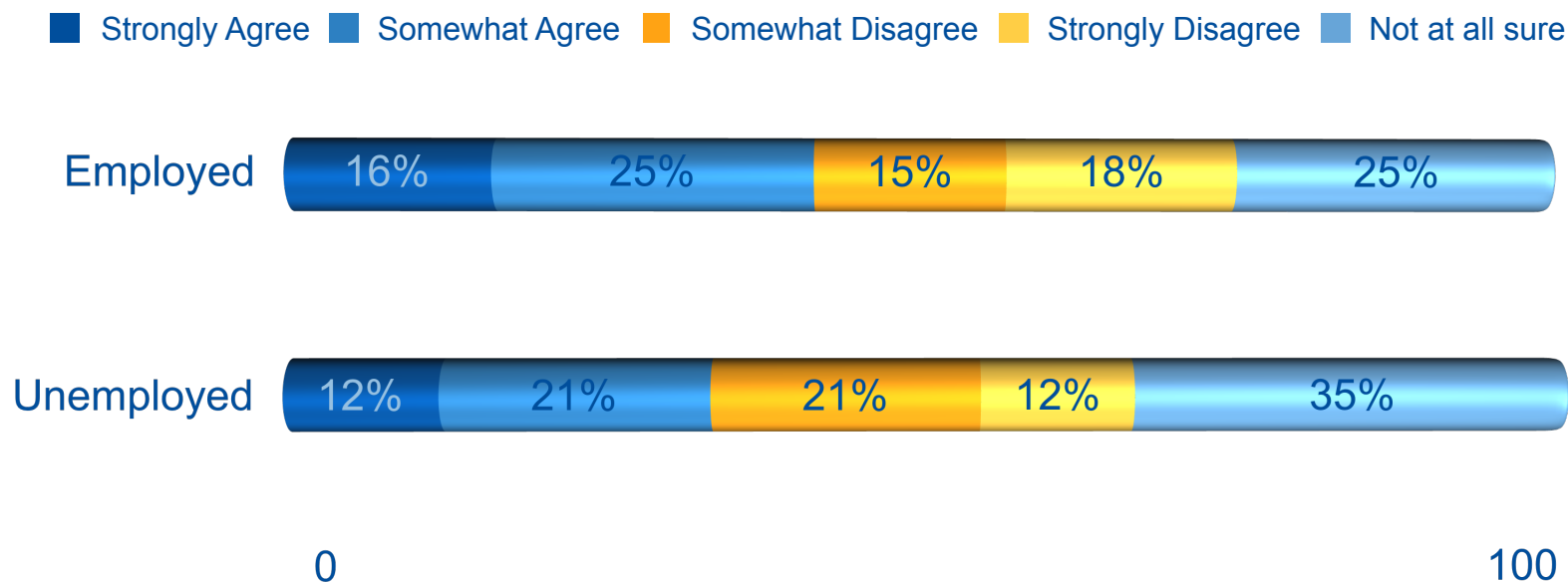
Only about one-third of Americans (38%) believe a withdrawal from NAFTA will bring back lost manufacturing jobs

A U.S. withdrawal from NAFTA will result in the return of most of the manufacturing jobs lost since NAFTA was signed



Only about one-third of unemployed Americans (32%) agree a withdrawal from NAFTA will bring back lost manufacturing jobs

A U.S. withdrawal from NAFTA will result in the return of most of the manufacturing jobs that have been lost since NAFTA was signed





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