

AUGUST 2016

2016 NATIONAL OPINION POLL

CANADIAN VIEWS ON ASIA



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ABOUT THE ASIA PACIFIC FOUNDATION OF CANADA

The Asia Pacific Foundation of Canada (APF Canada) has been a leader in research and analysis on Canada's relations with Asia for more than three decades. Our mission is to be Canada's catalyst for engagement with Asia and Asia's bridge to Canada. We do this by offering clear, specific, and actionable policy advice and leadership based on sound research and analysis.

APF Canada is dedicated to strengthening ties between Canada and Asia with a focus on expanding economic relations through trade, investment and innovation; promoting Canada's expertise in offering solutions to Asia's climate change, energy, food security, and natural resource management challenges; building Asia skills and competencies among Canadians, including young Canadians; and, improving Canadians' general understanding of Asia and its growing global influence.

Engaged in research and convening, APF Canada has developed strong ties with policy-makers, business leaders, academics, and opinion makers in Canada and throughout the Asia Pacific region.

ABOUT THE NATIONAL OPINION POLL: CANADIAN VIEWS ON ASIA

For 12 years, the Asia Pacific Foundation of Canada has been conducting regular nation-wide surveys to assess Canadians' attitudes toward, and perceptions of, Canada-Asia relations. Unique in its construction and its objectives, the Foundation's National Opinion Poll (NOP) has been instrumental in drawing a portrait of Canadians' perspectives on Asia and the region's increasing relevance to Canada's prosperity. With a large sample of over 3,500 Canadians, the National Opinion Poll serves as a valuable source of information about how Canadians feel about the rise of Asia.

The 2016 survey provides fresh data on Canadian views on Asia showing an increased belief that Canada is a part of the Asia Pacific region; and second, this awareness translates into increased support for policies that encourage economic and cultural engagement with Asian partners.

METHODOLOGY

The Asia Pacific Foundation of Canada commissioned EKOS Research Associates to conduct a survey of 3,526 Canadian adults who are participants in the Probit online survey panel.

The survey was conducted from June 28 to July 21, 2016. The margin of error – which measures sampling variability – is +/- 1.6% for the entire sample. The results have been statistically weighted by EKOS according to current Statistics Canada census data on age, gender, and region to ensure that the sample is representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding.

SURVEY OVERVIEW

Canadians feel more **connected** and **positive** toward Asia than they did two years ago, when attitudes were at a historic low. They are also more **optimistic** about future economic relations with the region. They view Asia as a priority, which is in line with the current federal government's focus on the region, as seen in its recent overtures to India, South East Asian nations, and China.

Across a number of key metrics – from trade agreements to collaboration on education – Canadian support for co-operation with Asian partners has increased. And in the case of China – Canada's largest trading partner in Asia and its second largest globally – Canadians report having more positive feelings towards the country than they did in 2014. Nearly half of Canadians (49%) see the growing importance of China as more of an opportunity than a threat as compared to 2014, when 41 per cent made this assessment. In line with a recent poll by Teck Resources, our poll finds that 50 per cent of Canadians say they could probably be persuaded to support a closer economic relationship with China if more information was available.

Meanwhile, Canadians today feel more connected to the Asia Pacific region than they did in 2014. Over one-third (34%) of Canadians consider Canada part of the Asia Pacific region, up from 22 per cent in 2014. This feeling of belonging to the Asia Pacific region translates into increased support for Canadian policies that advance engagement with Asia. Close to half (48%) of Canadians think that strengthening economic and political relations with Asia should be Canada's top foreign priority, up from 37 per cent in 2014. In particular, out of a range of issues that the government could focus on, Canadians ranked as the highest priority "addressing marine and air pollution" (40%) followed by "water and water management

systems” (38%). Support for cultural exchanges and education on Asia has also jumped in the past two years – up from 53 per cent to 69 per cent for exchanges, and from 43 per cent to 59 per cent for education.

Overall, Canadians are more optimistic about Asia, its growth, and Canada’s relationships with its member economies than they were two years ago. In 2014, for example, only 46 per cent of Canadians said Asia was important to their province’s prosperity; in 2016, that number jumped to 60 per cent. On the trade front specifically, almost half (46%) of Canadians support a free trade agreement (FTA) with China, up from 36 per cent in 2014. Support for FTAs is even higher for Japan (2016: 72%; 2014: 56%), India (2016: 55%; 2014: 38%), and the Association of Southeast Asian Nations (2016: 54%; 2014: 37%).

While optimism informs much of Canadian views on Asia in 2016, there are some aspects of engagement with Asia that Canadians continue to find disconcerting, particularly in connection with the Chinese government’s policies at home and abroad. Nearly half of Canadians (46%) believe there will be a significant military conflict in the Asia Pacific in the next 10 years (slightly up from 43% in 2014), with 65 per cent of Canadians citing China’s growing military power as a threat to the region (up from 60% in 2014).

And while Canadians are relatively positive on private investment from Asia, they remain distrustful of foreign state-owned enterprises (SOEs) investing in Canada. That feeling is highest with China (only 11% support investment by Chinese SOEs in Canada), followed by Malaysia (13%) and India (20%).

But perhaps most significantly, Canadians hold strong and consistent views on human rights issues in Asia, with half of Canadians (51%) willing to risk lost commercial opportunities if human rights concerns exist with a potential partner in Asia. Canadians are broadly supportive of Canada incorporating the promotion of human rights into foreign policy. Three-quarters (76%) say Ottawa should raise human rights issues, rather than

leave these issues as a local concern for countries to address on their own. In the specific case of human rights in China, the percentage of Canadians who believe human rights are improving in China is trending downward, with 35 per cent of Canadians saying it's getting better, compared with 39 per cent who felt things were improving in 2014. The survey responses reveal that in defining human rights, Canadians tend to be more concerned about political as opposed to economic and social rights.

The survey results reflect a knowledgeable public that recognizes both opportunities and challenges in deepening our relationship with Asia. The takeaway for the federal government is that it has a green light to move forward on developing a constructive and sustainable Asia strategy. However, there is a flashing red light on the road ahead: Canadians feel commercial engagement with Asia must factor in a wider commitment to promoting human rights and democracy in the region.

This will be no easy task and will require a sophisticated and nuanced approach.

KEY FINDINGS

SUPPORT FOR ENGAGEMENT WITH ASIA IS ON THE RISE

Canadian attitudes toward Asia have warmed since the Asia Pacific Foundation of Canada's 2014 survey. Canadians are feeling more connected to the Asia Pacific region than they were two years ago, with one-third (34%) of Canadians identifying Canada as part of the Asia Pacific region, up from just 22 per cent in 2014.

Canadians also view Asia as increasingly important to their economic prosperity. In 2014, for example, only 46 per cent of Canadians said Asia was important to their province's prosperity; in 2016, that number jumped to 60 per cent.

This feeling of belonging to the Asia Pacific and a growing recognition of the region's importance to Canada's future translate into increased support for policy engagement with Asia across a range of touch points. Support for provincial trade offices in Asia, for instance, is 61 per cent, up from 45 per cent in 2014. Likewise, support for placing emphasis on teaching Asian history and culture in schools is 59 per cent, up from 43 per cent in 2014.

We see clear evidence of optimism in Canada's relations with Asia in our 2016 National Opinion Poll. A turnover in government and political messaging may be playing a role in shaping Canadians' increasingly positive and proactive attitudes toward the Asia Pacific.

SUPPORT FOR TRADE AGREEMENTS IN ASIA REMAINS HIGH

The protectionist, anti-trade rhetoric dominating the 2016 U.S. election has not found a foothold in Canada. Donald Trump has made criticism of trade agreements a key plank in his election platform, and Hillary Clinton has backtracked on her prior support of the Trans-Pacific Partnership (TPP) agreement. But according to our survey results, Canada remains a country of resolute free traders.

Almost half (46%) of Canadians support a free trade agreement with China, up from 36 per cent in 2014. Support for an FTA is even higher for Japan (2016: 72%; 2014: 56%), India (2016: 55%;

2014: 38%), and the Association of Southeast Asian Nations (2016: 54%; 2014: 37%).

On the TPP specifically, negative political campaigning in the U.S. is not significantly influencing Canadian opinion. In an APF Canada survey from September 2015, almost equal numbers of Canadians supported and opposed the agreement (support: 41%; oppose: 38%). Close to a year of criticism in the U.S. has had no effect – our 2016 poll shows support is up to 44 per cent, while opposition is steady at 37 per cent.

Similarly, three-quarters (75%) of all Canadians say they support free trade agreements in general. This is higher than the share of Canadians who supported trade agreements in 2015 (66%) and 2014 (68%).

And finally, Canadians are no longer split on the Canada-South Korea free trade agreement. When APF Canada asked Canadians about an FTA with South Korea in 2014, before the agreement was officially completed, 41 per cent offered support for a deal and an equal number opposed the FTA. Now that the deal is ratified and implemented, APF Canada asked if the Canada-South Korea FTA was a good idea or a bad idea. In APF Canada's 2016 survey, half (52%) said the deal was a good idea, and only 17 per cent said it was a bad idea.

EDUCATIONAL COLLABORATION HAS STRONG NATIONAL SUPPORT

While Canada has been behind its friendly competitors like the U.S. and Australia in supporting Asia-connected educational programs in the Asia Pacific and at home, our 2016 poll indicates this is not due to a lack of public support.

Canadians strongly (69%) support efforts by universities in their home provinces to increase exchanges and education ties to Asian schools.

There is also majority support for placing more emphasis on Asia in the classrooms of provincial education systems. Fifty nine per cent of Canadians support increased content focused on Asia, up from 43 per cent in 2014.

In Atlantic Canada, 74 per cent of respondents support increasing the number of student exchanges. On the other side of the country, British Columbia is the most in favour of emphasizing education about Asia in the provincial education system, with 63 per cent of respondents supporting Asian content in the classroom, and more than 50 per cent supporting teaching Asian languages to high-school students.

CANADA'S RELATIONSHIP WITH CHINA IS COMPLEX, MULTI-FACETED

Canadians' views on China are increasingly optimistic on economic matters. Canadians have warmed on China since 2014, with almost half (49%) agreeing that China's rise is an opportunity more than a threat (43% disagreed), up from 41 per cent in 2014 (when 47% disagreed).

Canadians are also open to a closer economic relationship with China. Twenty per cent say they are supportive of Canada having a closer economic relationship with China, while half (50%) say they would be open to persuasion on closer co-operation if they had more information. This result is

consistent with a January 2016 Teck Resources-commissioned poll finding that 46 per cent of Canadians would be open to a closer relationship with China if they had more information.¹

Canadians are relatively optimistic about the Canada-China relationship, with approximately one-quarter (24%) of Canadians saying the relationship is improving, almost half (46%) saying it is staying the same, and only 16 per cent saying the relationship is worsening.

Canadians see the economic opportunity in China, but they continue to be apprehensive about the Chinese government's policies at home and abroad. Approximately two-thirds (65%) of Canadians see China's growing military power as a threat to the Asia Pacific region. Almost half (46%) of Canadians worry that China's increasing presence in Canada is a threat to the country's values and way of life. And only 35 per cent view the human rights situation in China as having improved over the last 10 years.

CANADIANS REMAIN CONCERNED OVER HUMAN RIGHTS AND REGIONAL SECURITY ISSUES

Close to half (48%) of Canadians think that strengthening economic and political relations with Asia should be Canada's top foreign policy priority, up from 37 per cent in 2014. However, Canadians are more comfortable engaging with Asia on some issues than others. Although most Canadians think a military conflict in the Asia Pacific will affect Canadian security, only four in 10 Canadians agree that we should commit to being

more involved in regional security initiatives.

When it comes to human rights, however, Canadians are broadly supportive of Ottawa incorporating the promotion of human rights into foreign policy. Three-quarters (76%) say the government should raise human rights issues, rather than leaving these issues as a local concern for countries to address on their own. Also, most Canadians are willing to risk lost commercial opportunities, to some degree, if human rights concerns exist – 51 per cent say Canada can afford to stop doing business with Asia over human rights concerns.

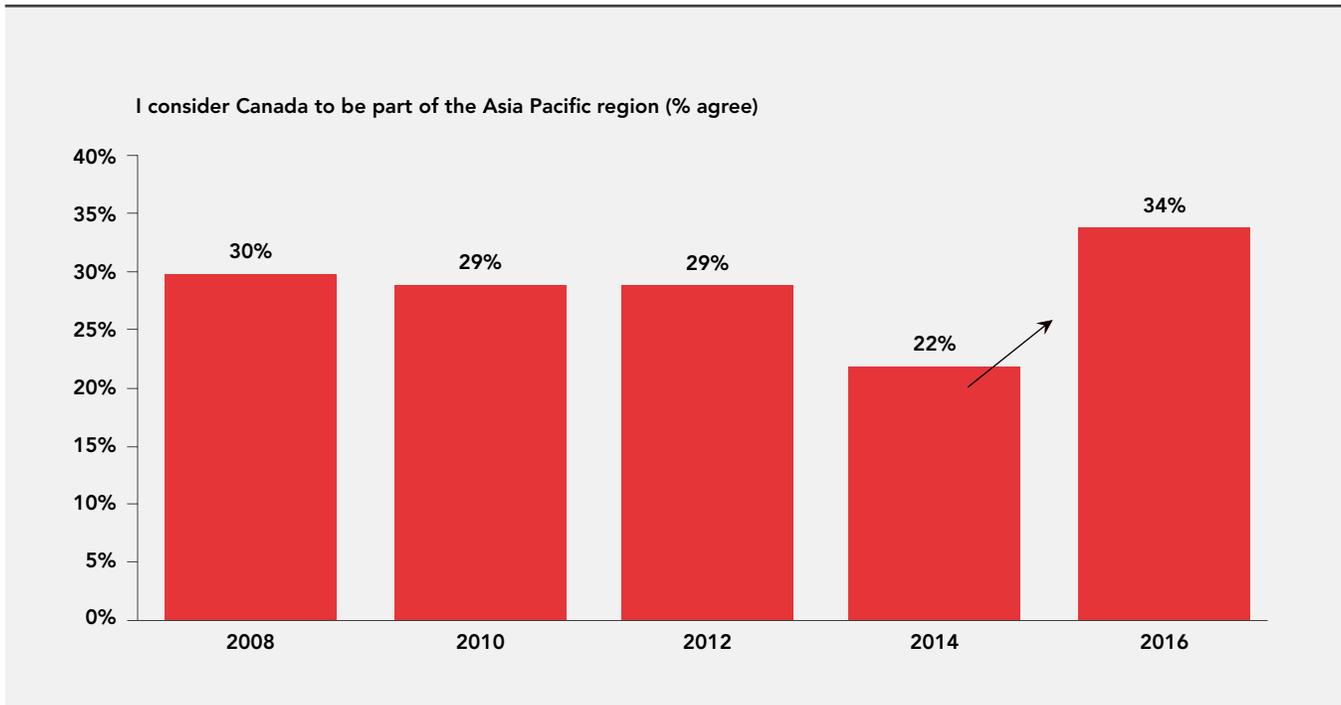
Not surprisingly, a majority (59%) of Canadians agree that promoting democracy in Asia should be a major priority for the Government of Canada.

ASIA PACIFIC IDENTITY AND INFORMATION

Increasingly globalized, Canadians demonstrate a greater sense of connectivity to and understanding of the Asia Pacific and its member economies than they did in 2014.

Agreement with the statement “I consider Canada to be part of the Asia Pacific region” has varied from a high of 39 per cent in 2006 to a low of 18 per cent in 2013. In 2016, 34 per cent of respondents answered that Canada is part of the Asia Pacific region, close to the historical high.

Canadians feel more connected with the Asia Pacific



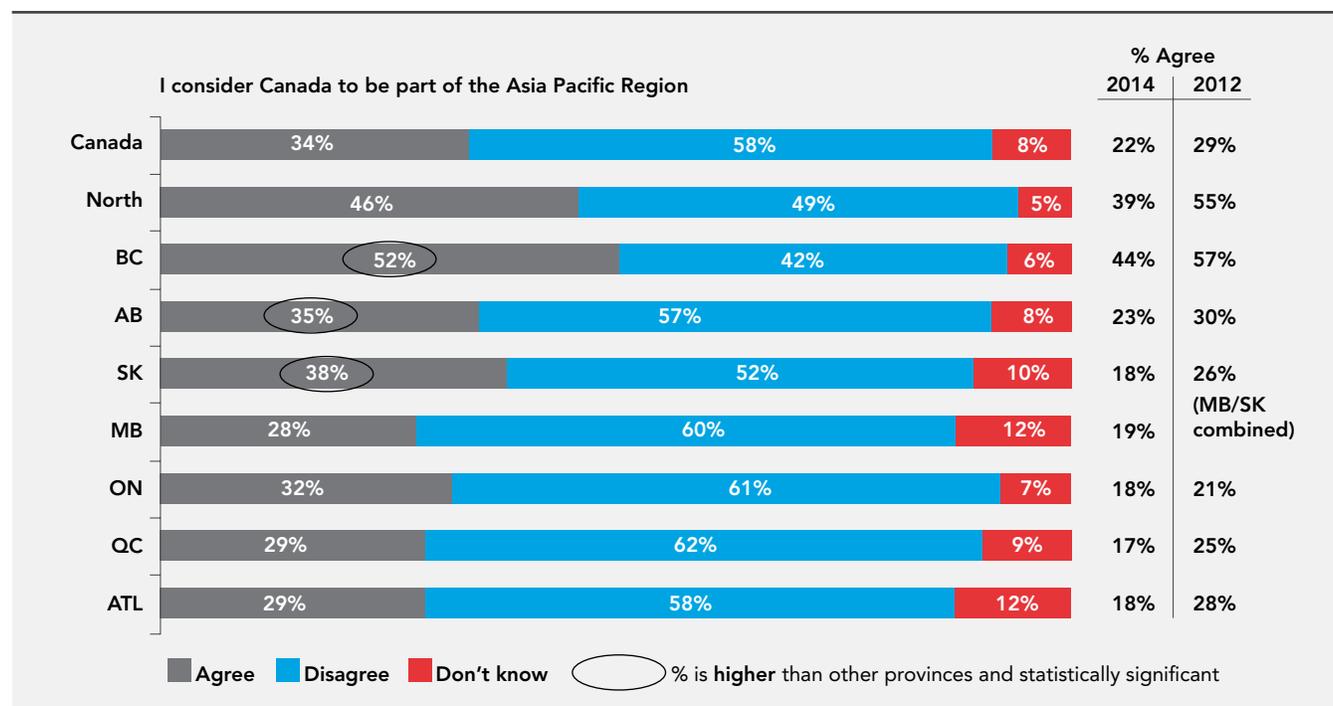
Base: All respondents: 2008 (n = 1,058), 2010 (n = 2,903), 2012 (n = 3,179), 2014 (n = 3,487), 2016 (n = 3,526)

Q7: Do you agree or disagree with the following statement: “I consider Canada to be part of the Asia Pacific region”?

Similar to past surveys, residents of British Columbia have the strongest attachment to the region, with over half (52%) agreeing that Canada is part of the Asia Pacific. Notably, residents of Saskatchewan exhibit significantly stronger

attachment to the Asia Pacific region than they have in the past, with agreement jumping from 18 per cent to 38 per cent. This could reflect Saskatchewan’s burgeoning economic ties with Asia, particularly in the area of agricultural goods.²

British Columbia most likely to consider Canada a part of the Asia Pacific



Base: All respondents: 2012 (n = 3,179), 2014 (n = 3,487), 2016 (n = 3,526)

Q7: Do you agree or disagree with the following statement: "I consider Canada to be part of the Asia Pacific region"?

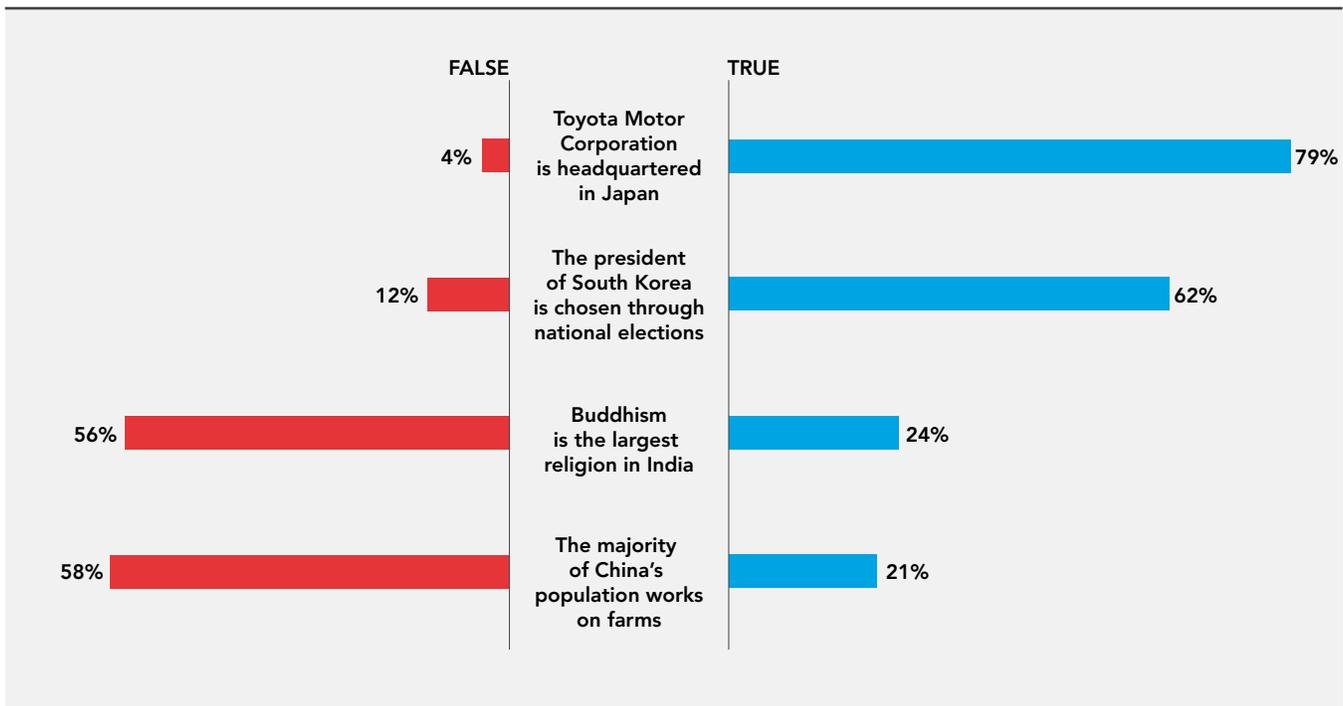
The Asia Pacific is a politically, economically, and culturally diverse region. To gauge Canadians’ general knowledge of the region’s countries and cultures, APF Canada posed a short series of true and false questions about four of Canada’s major Asia partners: China, India, Japan, and South Korea.

Overall, Canadians performed respectably on our pop quiz. Most Canadians (58%) correctly identify as false the statement, “The majority of China’s population works on farms.” China is a rapidly urbanizing country, with United Nations data showing that the proportion of Chinese living in urban areas rose from 26 per cent in 1990 to

54 per cent in 2014, and most Canadians recognize the change that has occurred.³

Japanese companies play a large role in the Canadian market, with Toyota and Honda regularly ranking among the top-selling automakers in the country. It is perhaps not surprising, then, that four-fifths (79%) of Canadians correctly identify as true the statement, “Toyota Motor Corporation is headquartered in Japan.” This underlying knowledge of Japan’s auto industry no doubt contributes to Canadians positive views of Japanese investment, which is widely perceived as bringing new technologies to the country.⁴

Most Canadians have a base of accurate information about Asian countries



Base: All respondents: (n = 3,526)

Q2: Please indicate whether you think each of the following statements about Asia are true or false

In APF Canada’s 2012 survey, more Canadians associated South Korea with the term “authoritarian” than they did “free.”⁵ This is consistent with the common mistake of confusing the Koreas. There was minimal Korean confusion in the 2016 survey. Over half (62%) of Canadians correctly identify as “true” the statement, “The president of South Korea is chosen through national elections.” Only 12 per cent responded “False.” Some may still be confusing South Korea with its North Korean neighbour, which functions as a single-party regime with an unofficial system of hereditary succession. Nonetheless, a small minority of Canadians make this mistake.

Just prior to Indian Prime Minister Modi’s visit to Canada in 2015, the Angus Reid Institute found that 88 per cent of Canadians correctly identify Hinduism as one of the country’s two biggest faith groups.⁶ Knowledge of India’s religious composition does appear to be widespread within Canada. Over half (56%) of respondents correctly identify as “False” the statement “Buddhism is the largest religion in India.” Buddhism originated in India, but most Canadians know it is not the country’s largest faith group in the contemporary era.

Most Canadians have a base of accurate information about Asian countries

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
Toyota Motor Corporation is headquartered in Japan	% Agree	79%	81%	80%	79%	80%	76%	80%	77%	75%
	% Disagree	4%	4%	4%	5%	6%	4%	4%	4%	5%
The president of South Korea is chosen through national elections	% Agree	62%	65%	68%	66%	60%	52%	65%	57%	53%
	% Disagree	12%	13%	10%	12%	12%	15%	9%	17%	15%
The majority of China's population works on farms	% Agree	21%	28%	20%	21%	17%	20%	21%	24%	16%
	% Disagree	58%	61%	59%	24%	61%	56%	57%	58%	61%
Buddhism is the largest religion in India	% Agree	25%	25%	15%	21%	24%	29%	19%	37%	27%
	% Disagree	60%	60%	65%	57%	52%	49%	60%	48%	47%

 % is **higher** than other provinces and statistically significant
 % is **lower** than other provinces and statistically significant

Base: All respondents: (n = 3,526)

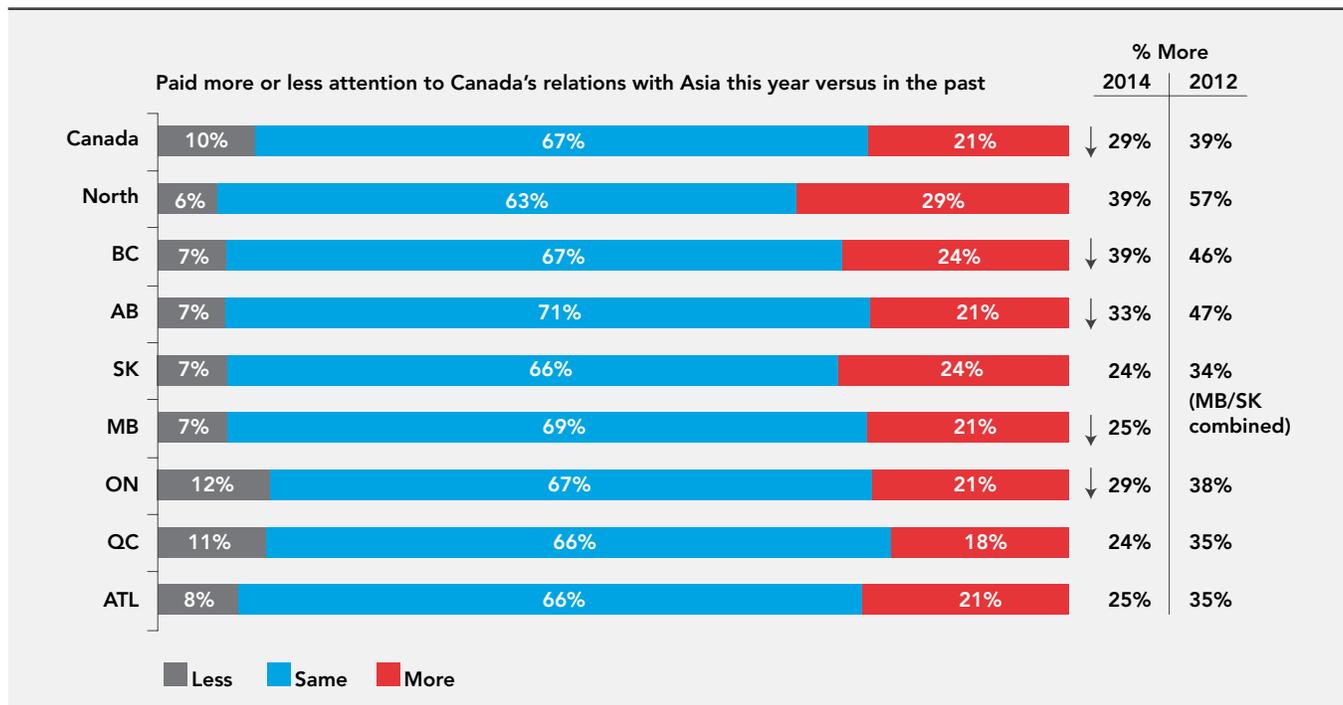
Q2: Please indicate whether you think each of the following statements about Asia are true or false

News about Asia is only a modest part of the world coverage provided by Canadian news outlets and programs. Trends and events affect the attention Canadians pay to the news. Over the past several years, APF Canada has observed a decline in the percentage of Canadians responding “more” to the question, “Generally speaking, in the past year, would you say you’ve paid more attention or less attention to Canada’s relations with Asia than you have in the past?” Between 2012 and 2014, the “more” group dropped from 39 per cent to 29 per cent. Though it would be unrealistic for

Canadians to say “more” year on year, this decline was one indicator of changes in this consumption of Asia news.

This downward trend in the “more” group was apparent again in 2016. Only 21 per cent indicated they had paid more attention to Asia coverage this year than the last. By far the most common response (67%) was, “About the same amount.” Whether this reflects actual trends in coverage is difficult to say.

Canadians paid as much attention to Canada’s relationship with Asia as they have in the past

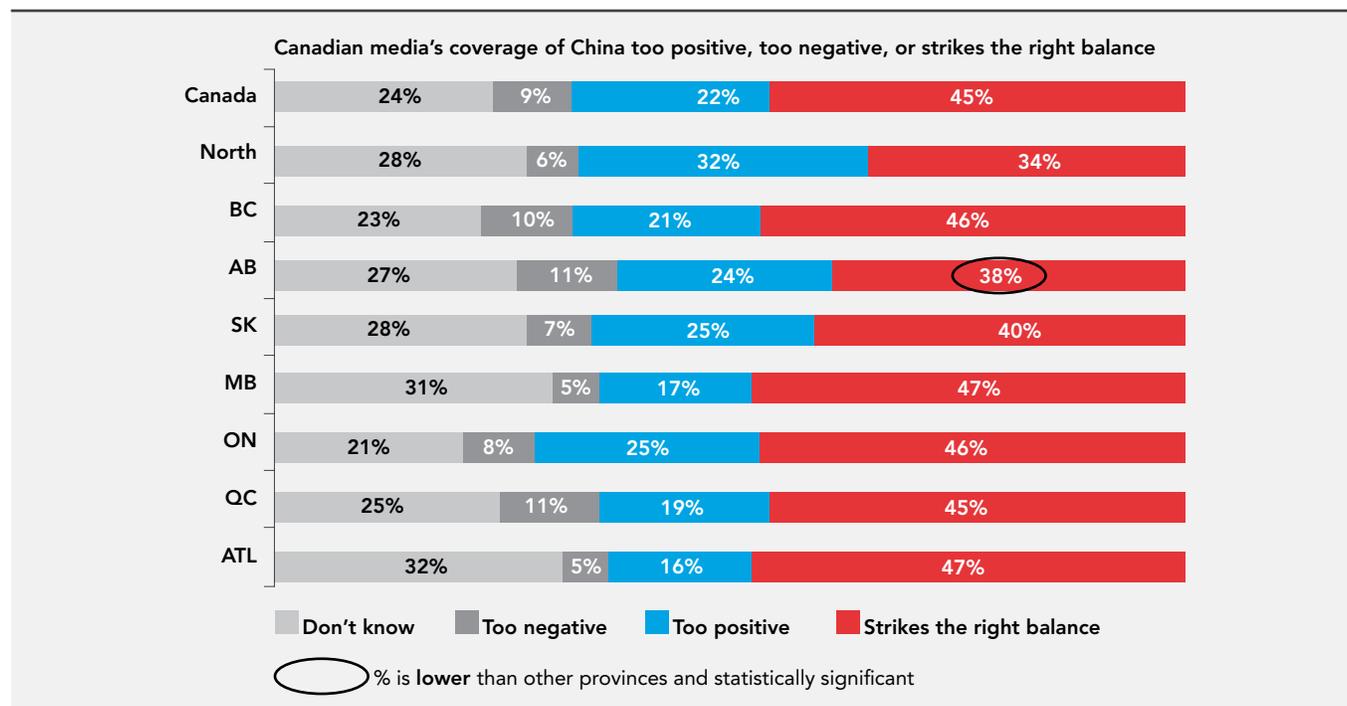


Base: All respondents: 2012 (n = 3,179), 2014 (n = 3,487), 2016 (n = 3,526)
 Q3: Generally speaking, in the past year, would you say you’ve paid more attention or less attention to Canada’s relations with Asia than you have in the past?
 Arrows indicate statistically significant year-on-year change

Going beyond questions about trends, APF Canada’s 2016 survey also included a question about the fairness of coverage toward China. Respondents were asked “Do you think the Canadian media’s coverage of China is too negative, too positive, or strikes the right balance?” On the whole, Canadians

perceive their country’s media as acting fairly. Almost half (45%) said the media “Strikes the right balance.” Only nine per cent said the media is “Too negative.” Approximately 22 per cent responded that Canadian coverage is “Too positive.”

Canadians think the media strike the right balance when covering China



Base: All respondents: (n = 3,526)

Q4: Do you think the Canadian media's coverage of China is too negative, too positive, or strikes the right balance?

PERCEPTIONS OF ASIAN COUNTRIES AND RELATIONSHIPS

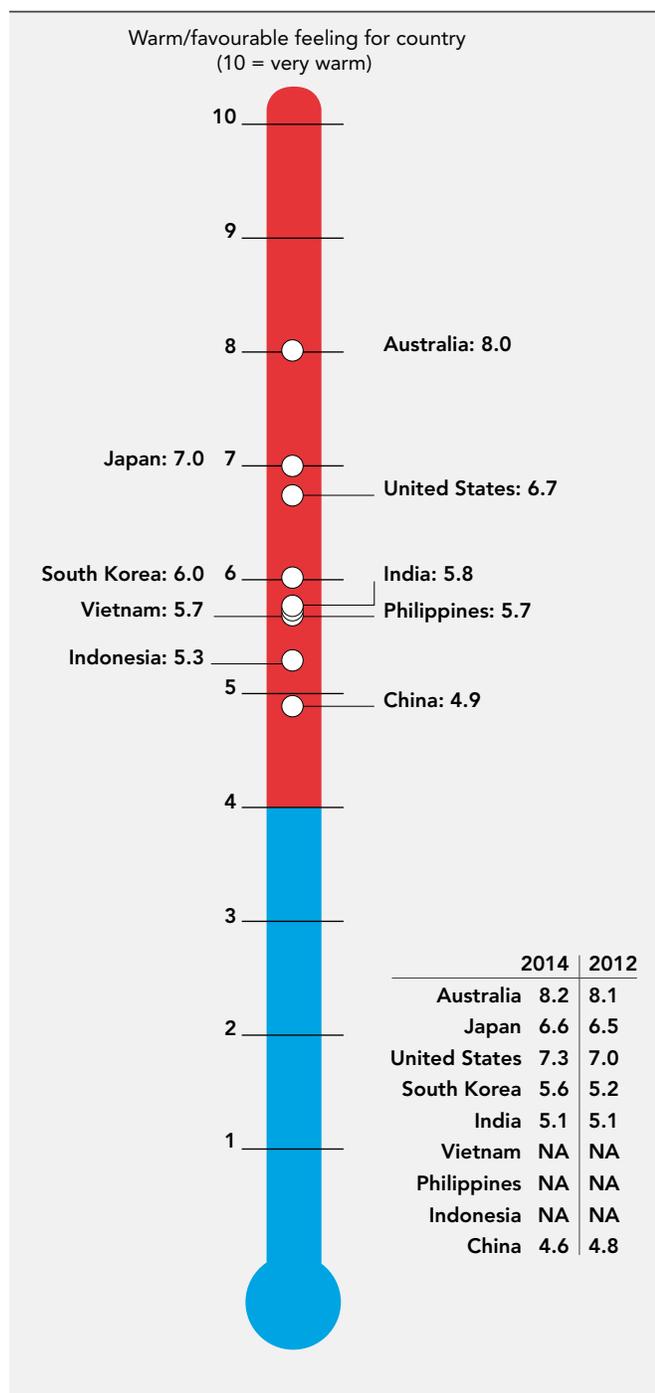
Canadians see the rapid growth of Asian economies more as an opportunity than a threat, and are prepared to support closer relations given more information on Asian partners and partnerships.

Although the feelings Canadians have toward Asian countries tend to be relatively consistent over time, we see a “warming” in the 2016 results compared

to previous surveys. APF Canada asked a battery of 1-to-10 “feeling thermometer” questions about Asian countries, with 10 indicating “warm” feelings and 1 indicating “cold” feelings.

Canadians have the “warmest” feelings for Australia, at an average of eight out of 10. Japan and South Korea elicit the next most positive results, at seven and six, respectively.

Canadians feeling warmer toward Asian countries



Base: All respondents: 2012 (n = 3,129), 2014 (n = 3,487), 2016 (n = 3,526)

Q5: Please rate your feelings towards some countries, with ten meaning a very warm, favourable feeling, one meaning a very cold, unfavourable feeling, and five meaning not particularly warm or cold. You can use any number from one to ten: the higher the number the more favourable your feelings are toward that country.

NA: No data available

For the first time, APF Canada has included the three largest countries in Southeast Asia: Philippines, Vietnam, and Indonesia. Canadians tend to be lukewarm on these countries. Out of 10, average feeling thermometer scores were 5.7 for both the Philippines and Vietnam, and 5.3 for Indonesia.

Feelings toward the two largest countries in Asia – China and India – are similar to those for Southeast Asia. India received an average feeling thermometer score of 5.8, an increase from 5.1 in 2014. China was the lowest, receiving a score of 4.9. Though Canadians’ feelings toward China are “cooler” than other countries in the survey, the result was significantly higher than the 4.6 outcome from 2014, and marked the “warmest” evaluation for China since the question was introduced in 2010.

Canadians generally have positive feelings toward Asia; Quebec especially has warmer feelings toward Asia

Feelings toward select countries from 1 (negative) to 10 (positive)									
	CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
Australia	8.03	7.88	7.79	8.20	8.04	8.11	8.09	7.96	8.06
Japan	7.01	7.07	7.18	6.96	6.80	6.92	6.96	7.11	6.80
United States	6.77	6.17	6.24	6.83	6.70	6.78	6.80	7.08	6.70
South Korea	6.02	6.21	6.25	6.03	5.49	5.82	6.14	5.84	5.95
India	5.77	6.21	5.79	5.53	5.47	5.77	5.73	5.94	5.97
Vietnam	5.72	6.19	5.74	5.46	5.25	5.51	5.60	6.17	5.62
Philippines	5.72	6.20	5.89	5.73	5.68	6.14	5.68	5.61	5.74
Indonesia	5.29	5.42	5.33	5.13	5.05	5.26	5.20	5.50	5.38
China	4.89	4.64	4.74	4.72	4.54	5.14	4.76	5.30	4.97

 % is **higher** than other provinces and statistically significant
 % is **lower** than other provinces and statistically significant

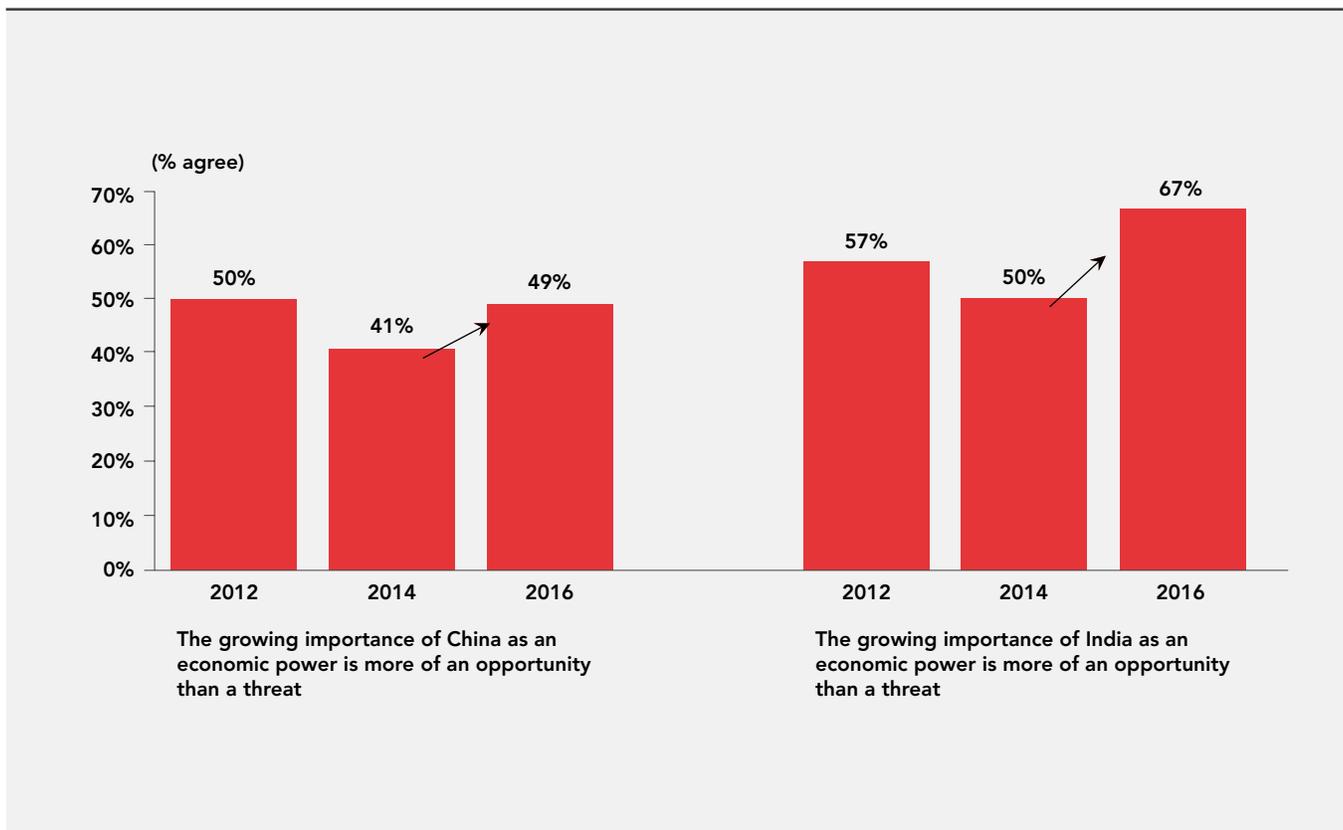
Base: All respondents: (n = 3,526)

Q5: Please rate your feelings towards some countries or regions.

Canadians tend to view the growing economic power of large Asian countries as more of an opportunity than a threat. Almost half (49%) of Canadians agreed with the statement, “The growing importance of China as an economic power is more of an opportunity than a threat.”

This is a significant increase from the 41 per cent of Canadians who shared that sentiment in 2014. Similarly, two-thirds (67%) agree that “the growing importance of India as an economic power is more of an opportunity than a threat.”

Canadians increasingly positive on economic power of India and China

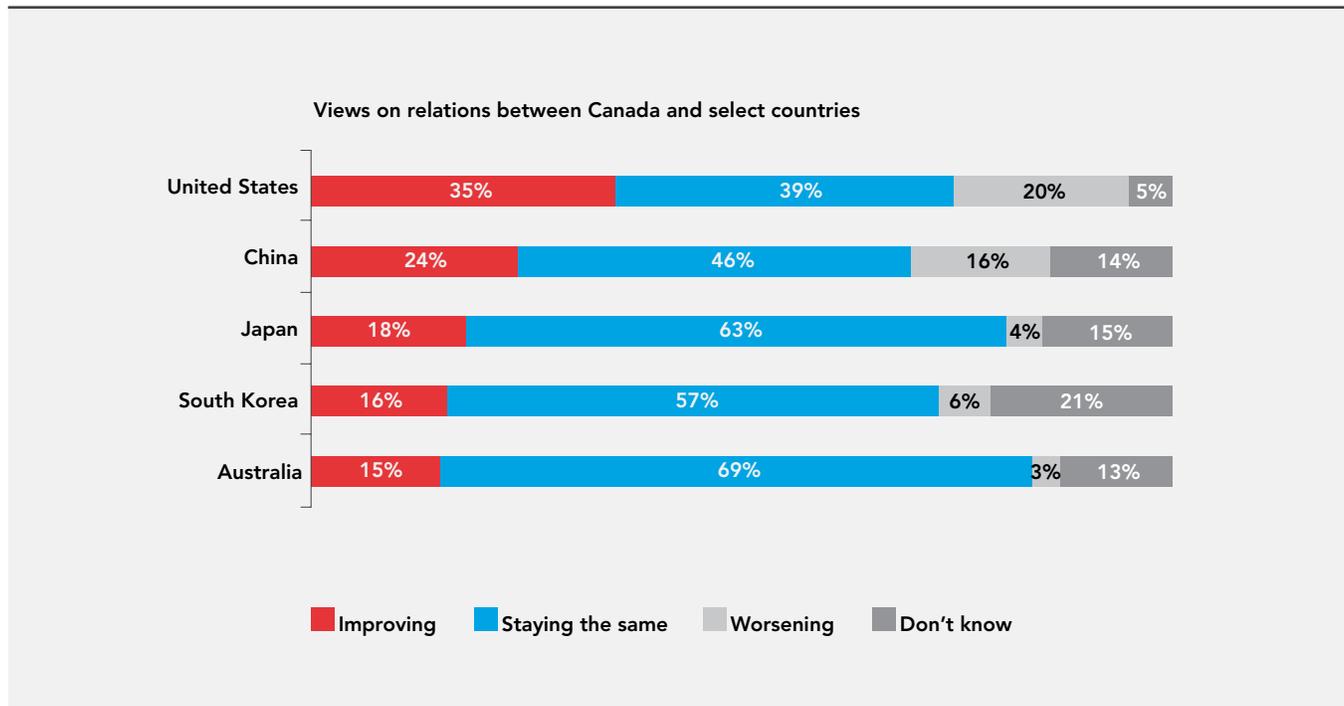


Base: All respondents: 2012 (n = 3,129), 2014 (n = 3,487), 2016 (n = 3,526)
 Q8: Do you agree or disagree with the following statements about Canada’s relations with Asian countries?

New this year, APF Canada asked, “In your opinion, are relations between Canada with the following countries improving, worsening or staying about the same?” The most common answer was “staying

the same.” This was also true for the assessment of relations with Australia (69%), Japan (63%), and South Korea (57%).

Canadians feel relations with Asia Pacific countries are staying the same or improving



Base: All respondents: (n = 3,526)

Q6: In your opinion, are relations between Canada with the following countries improving, worsening or staying about the same?

Respondents were more split on relations with China, with just under half (46%) responding “staying the same.” Indeed, there are signs of optimism about the relationship with China, with almost one quarter (24%) responding relations

are improving. Just 16 per cent think relations are worsening. By way of comparison, 20 per cent of Canadians think relations with the U.S. are worsening, 35 per cent see improvement, and 39 per cent say relations are staying the same.

Most Canadians believe relations with other countries are staying the same or improving

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
United States	% Improving	35%	33%	30%	25%	31%	33%	34%	46%	36%
	% Worsening	20%	28%	23%	31%	25%	21%	24%	12%	20%
	% Staying the same	39%	35%	41%	38%	39%	25%	41%	37%	38%
China	% Improving	24%	21%	26%	19%	20%	23%	23%	27%	22%
	% Worsening	16%	35%	20%	19%	19%	13%	17%	12%	16%
	% Staying the same	46%	29%	41%	47%	47%	44%	48%	47%	43%
Japan	% Improving	18%	24%	16%	16%	18%	18%	17%	22%	16%
	% Worsening	4%	2%	2%	4%	5%	3%	4%	4%	3%
	% Staying the same	63%	61%	67%	63%	62%	59%	65%	61%	59%
South Korea	% Improving	16%	18%	13%	15%	11%	15%	15%	19%	12%
	% Worsening	6%	2%	4%	6%	9%	7%	5%	10%	7%
	% Staying the same	57%	54%	60%	57%	59%	54%	60%	51%	52%
Australia	% Improving	15%	12%	13%	15%	18%	16%	15%	17%	14%
	% Worsening	3%	0%	3%	3%	4%	2%	3%	2%	2%
	% Staying the same	69%	78%	70%	68%	68%	65%	70%	67%	67%
Russia	% Improving	8%	11%	8%	8%	7%	10%	8%	8%	10%
	% Worsening	57%	63%	54%	59%	55%	51%	60%	54%	54%
	% Staying the same	23%	21%	24%	22%	23%	21%	22%	25%	20%

○ % is higher than other provinces and statistically significant
 ○ % is lower than other provinces and statistically significant

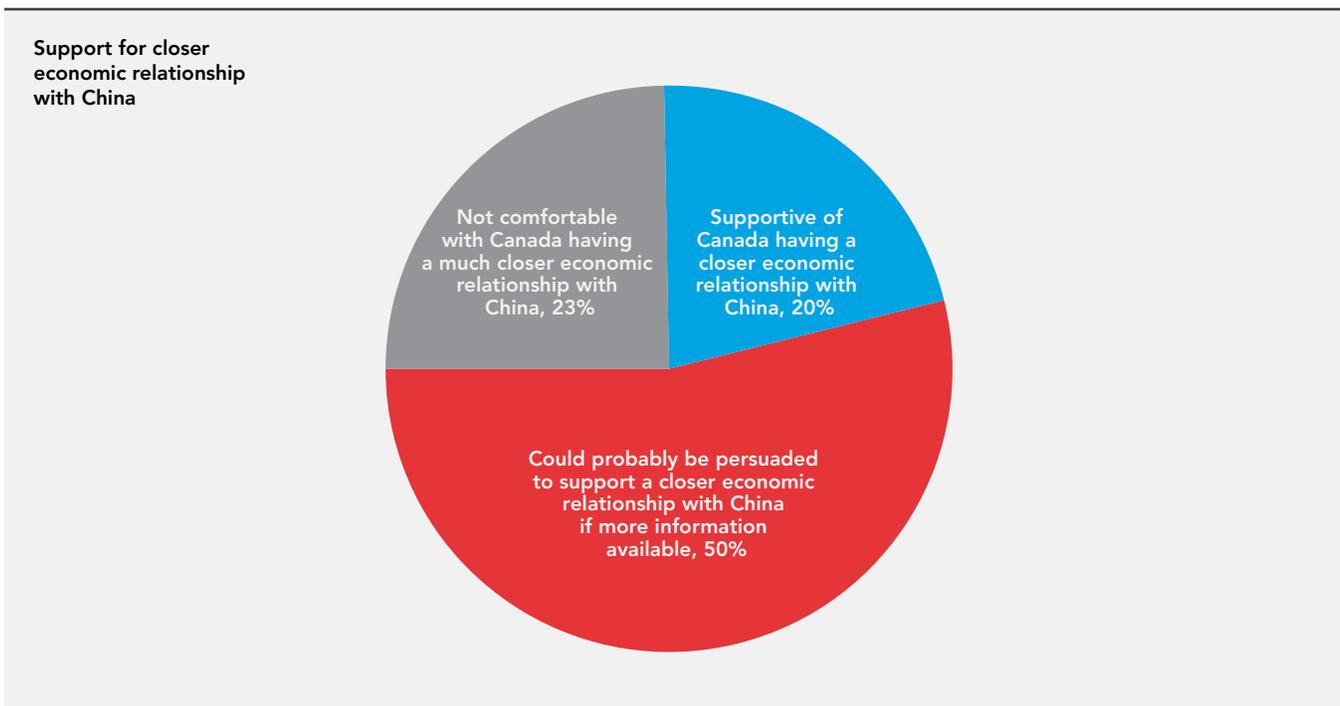
Base: All respondents: (n = 3,526)

Q6: In your opinion, are relations between Canada with the above countries improving, worsening or staying about the same?

Canadians are also willing to consider a closer economic relationship with China. A slightly modified version of a 2016 Teck Resources survey question was included in this year’s APF Canada poll, asking respondents which view on relations with China was closest to their own: “I’m supportive of Canada having a closer economic relationship

with China,” “I could probably be persuaded to support a closer economic relationship with China if I knew more about what was involved,” and, “I simply don’t think I can get comfortable with Canada having a much closer economic relationship with China.”⁷

Canadians could support closer economic relationship with China with more information available



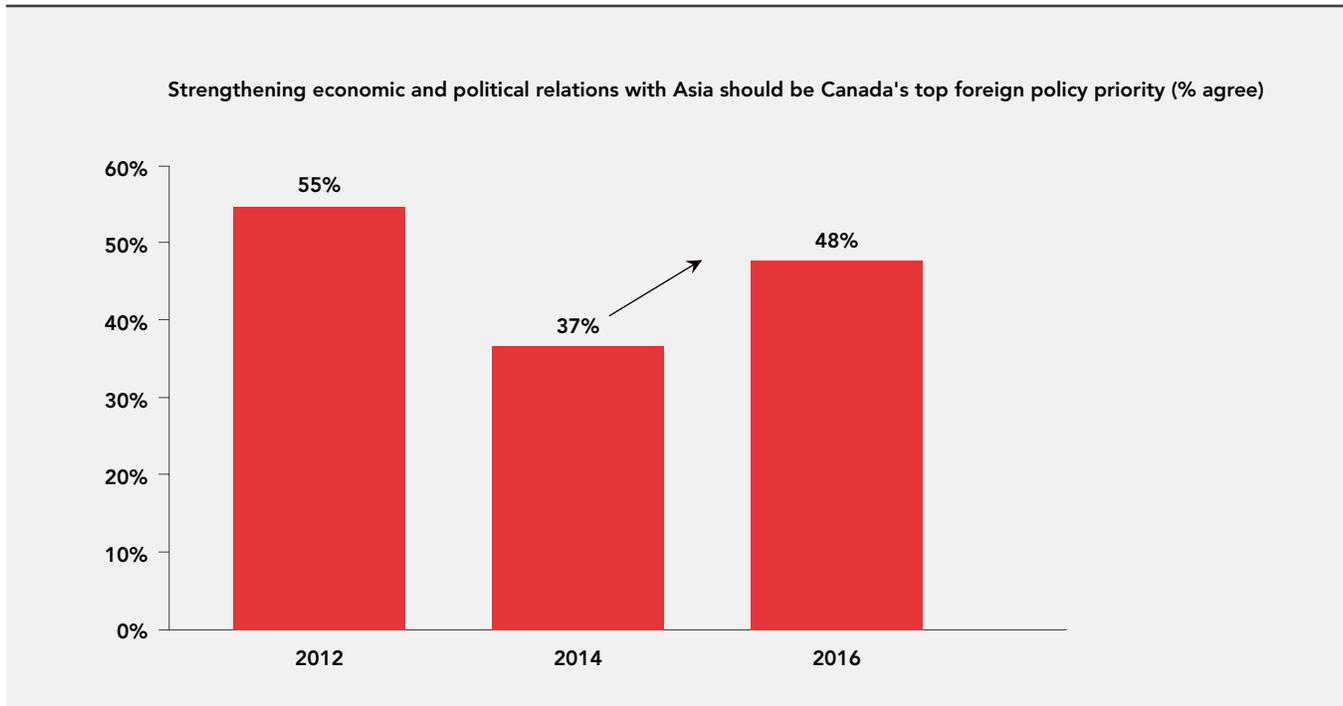
Base: All respondents (n = 3,526)
Q12: Which of the following views is closer to yours?

Half of Canadians (50%) say they are open to persuasion. This echoes the Teck survey, which found 46 per cent indicating they could be convinced of a closer relationship with China. The number saying they support closer ties (20%) is almost equal to that saying they cannot get comfortable with a closer relationship with China (23%). Again, this finding is similar to the earlier Teck poll.

The growing perception of opportunity and the optimism around relations underpin a rebound

in Canadians’ views on the importance of economic and political relations with Asia. Between 2012 and 2014, the percentage of Canadians expressing agreement with the statement “Strengthening economic and political relations with Asia should be Canada’s top foreign policy priority” dropped from 55 per cent to 37 per cent. In 2016, agreement with the statement was back up to 48 per cent, close to the historical average.

Rebound in Asia's importance as Canada's top foreign policy priority



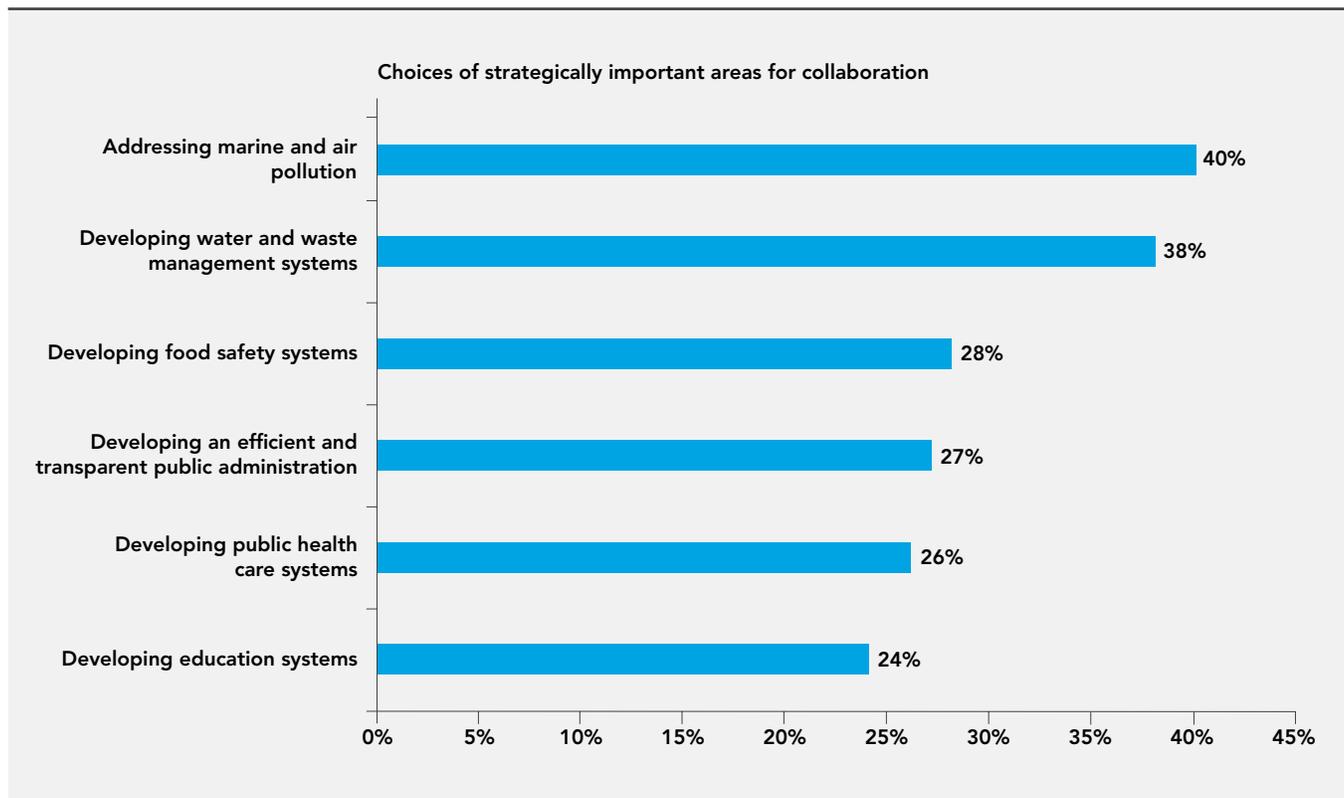
Base: All respondents: 2012 (n = 3,179), 2014 (n = 3,487), 2016 (n = 3,526)

Q8: Do you agree or disagree with the following statements about Canada's relations with Asian countries?

Canadians view Asia as a priority, but what should the Government of Canada focus on? Canada has a variety of strengths in the areas of governance, development, and non-traditional security. Our survey respondents were provided with a list of six areas of commercial and policy expertise and asked to select two priority areas. Highest on the list were options that addressed environmental concerns. Forty per cent of Canadians prioritized “Addressing marine and air pollution.” Next, 38

per cent ranked “Water and water management systems” as a priority. After these two top areas of focus, 28 per cent selected “Developing food safety systems,” and 27 per cent chose “Developing an efficient and transparent public administration.” One-quarter indicated Canada should prioritize social services, including “Developing public health care systems” (26%) and “Developing education systems” (24%).

Canadians believe Canada should focus on environmental concerns when collaborating with Asian partners



Base: All respondents: (n = 3,526)

Q29: Canada has commercial and policy expertise in many areas. From the list, please select two areas you think are most strategically important for Canada to focus on when collaborating with Asian partners.

VIEWS OF CANADA-ASIA ECONOMIC RELATIONS

Canadians recognize the increasing importance of economic partnerships in Asia, and encourage the Government of Canada to enhance two-way engagement to facilitate increased trade and investment.

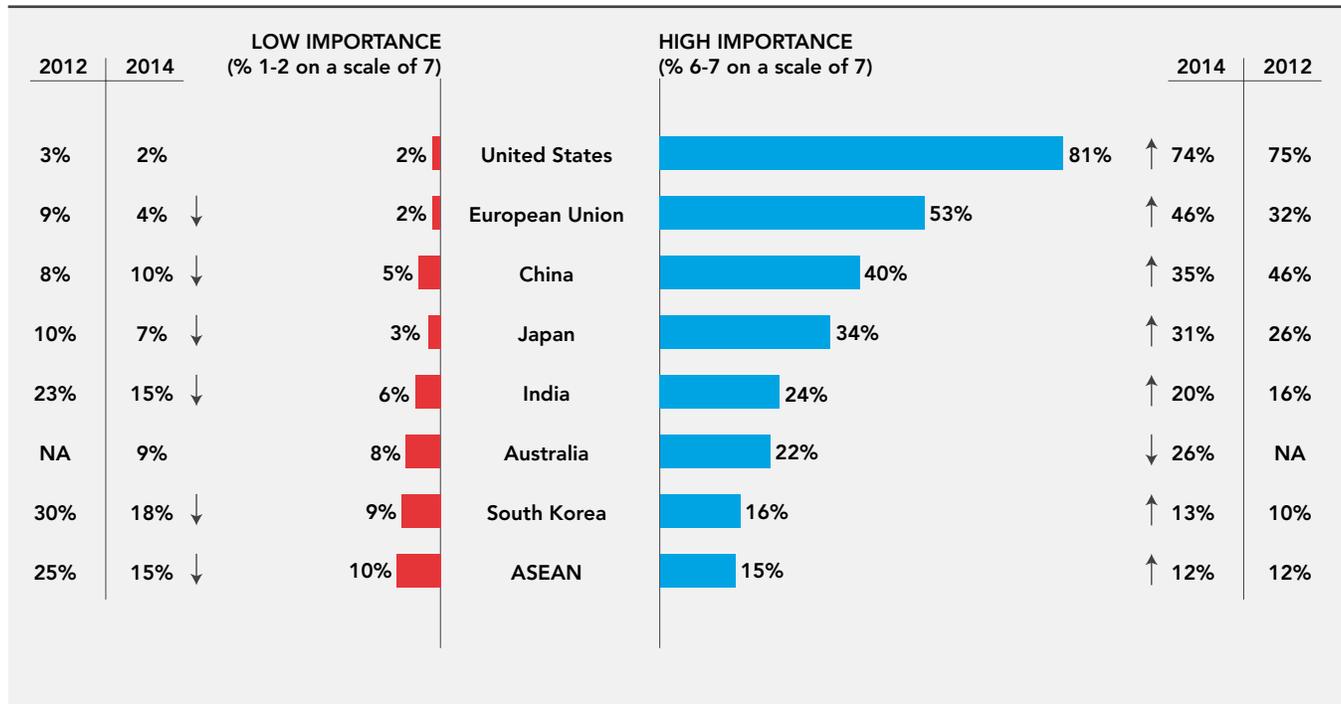
In 2014, APF Canada found that Canadians generally viewed Asia Pacific countries as important to Canada's prosperity compared to other emerging markets in Latin America and Africa, but viewed partners in Asia as less important than traditional partners like the European Union and the United States.

Compared to those 2014 results, however, Canadians are now seeing economic partners in the Asia

Pacific as increasingly important to Canada's prosperity. Respondents were provided with a 1-to-7 scale for a battery of countries, with 7 indicating a country of highest importance to Canada's prosperity, and 1 indicating lowest importance.

Consistent with past years, Canadians ranked China as the most important economic partner in Asia. Approximately 40 per cent rate the country as "highly important" (6 or 7), up from 35 per cent in 2014. One-third (34%) rate Japan as highly important – again, up somewhat from 31 per cent in 2014. India was rated "highly important" by 24 per cent, South Korea by 16 per cent, and 15 per cent rate the Association of Southeast Asian Nations as "highly important."

Canadians increasingly view Asian countries as very important to Canada’s economic prosperity

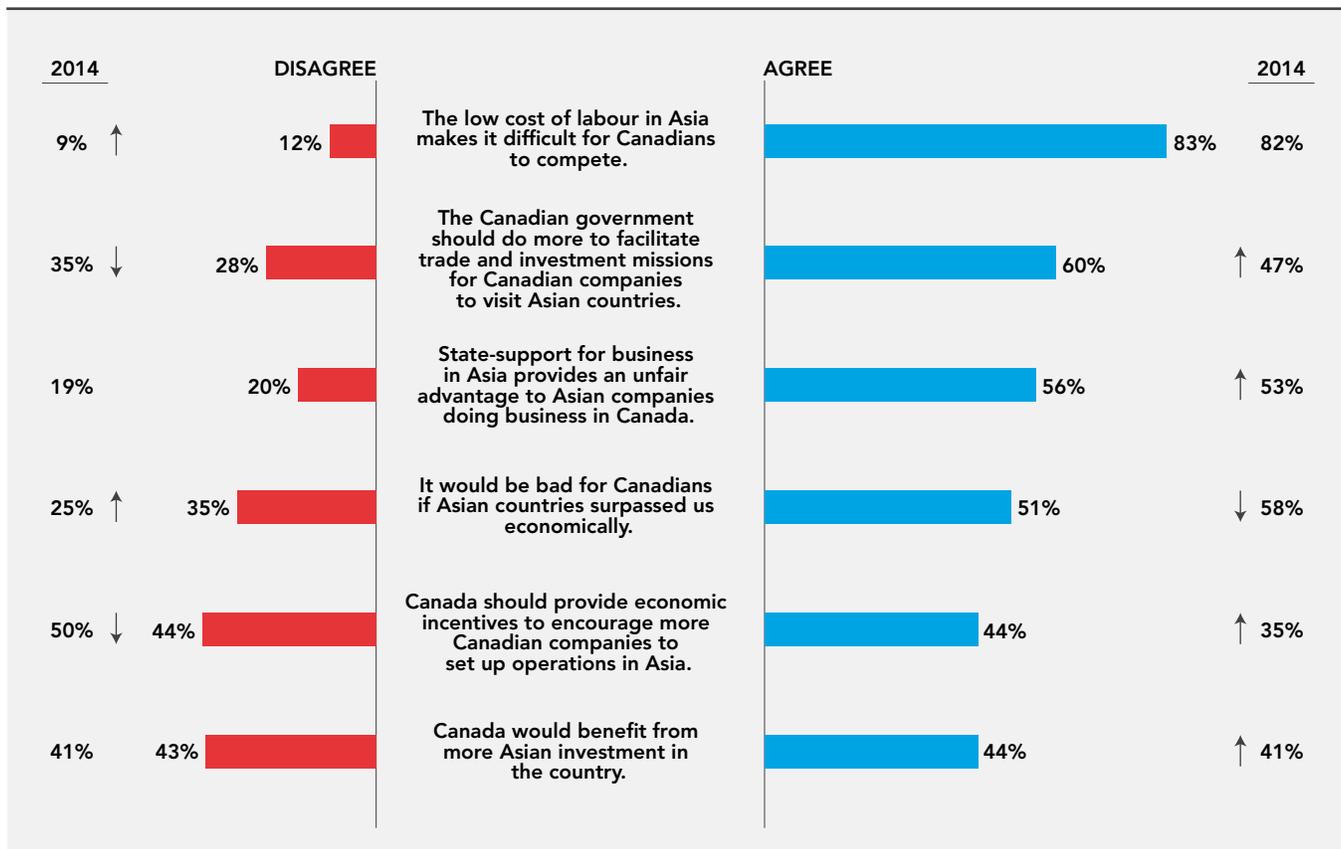


Base: All respondents: 2012 (n = 3,129), 2014 (n = 3,487), 2016 (n = 3,526)
 Q11: Generally speaking, would you say each of the following countries or regions is important or not important to Canada’s prosperity?
 NA: No data available
 Arrows indicate statistically significant year-on-year change

How do these ratings stack up against Canada’s more traditional trading partners? Australia, which is in the Asia Pacific, is rated as “highly important” by 22 per cent, a little less than in 2014 (26%). As always, the U.S. was viewed as the most important partner for Canadian prosperity, with four-fifths (81%) rating it of high importance. Interestingly, there was little movement in the perceived importance of the European Union, even though the survey was in the field following the United Kingdom’s vote to exit the political-economic union. Over half (53%) of Canadians rate the EU as highly important, up from 2014 (46%) and considerably higher than in 2012 (32%).

Although public perceptions of Asian partners’ economic importance are up a little from 2014, there is nonetheless some continued unease with Asia’s growth. Eighty-three per cent of Canadians agree with the statement, “The low cost of labour in Asia makes it difficult for Canadians to compete,” similar to the result in 2014 (82%). Over half (51%) agree that “It would be bad for Canadians if Asian countries surpassed us economically,” though this is down from 58 per cent in 2014. Furthermore, 56 per cent agree with the statement, “State-support for business in Asia provides an unfair advantage to Asian companies doing business in Canada,” up from 53 per cent in 2014. Taken together, results underline continued anxiety over competing with rising Asian partners.

Canadians are concerned about competing with low-cost labour in Asia; want government support for Canadian trade and investment missions to Asia



Base: All respondents: 2014 (n = 3,487), 2016 (n = 3,526)
 Q14: Do you agree or disagree with each of the following statements on Canada’s economic relations with Asia?
 Arrows indicate statistically significant year-on-year change.

The overall attitude, however is not defeatist or isolationist; three-fifths (60%) agree with the statement, “The Canadian government should do more to facilitate trade and investment missions for Canadian companies to visit Asian countries,” up from 47 per cent in 2014. Forty-four per cent agree that “Canada would benefit from more

Asian investment in the country,” similar to the result in 2014 (41%). Forty-four per cent agree with the statement, “Canada should provide economic incentives to encourage more Canadian companies to set up operations in Asia,” up from 35 per cent in 2014.

Quebec and Ontario are more worried than other provinces about low labour costs in Asia harming Canadian competitiveness

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
The low cost of labour in Asia makes it difficult for Canadians to compete	% Agree	83%	79%	82%	79%	81%	77%	84%	86%	82%
	% Disagree	12%	17%	14%	15%	12%	12%	11%	11%	9%
The Canadian government should do more to facilitate trade and investment missions for Canadian companies to visit Asian countries	% Agree	60%	56%	53%	60%	59%	59%	62%	62%	59%
	% Disagree	28%	37%	32%	27%	24%	22%	27%	27%	26%
State-support for business in Asia provides an unfair advantage to Asian companies doing business in Canada	% Agree	56%	61%	57%	60%	57%	48%	60%	48%	53%
	% Disagree	20%	18%	18%	21%	16%	21%	17%	29%	18%
It would be bad for Canadians if Asian countries surpassed us economically	% Agree	51%	49%	46%	50%	43%	47%	52%	54%	46%
	% Disagree	35%	44%	37%	35%	38%	37%	36%	32%	36%
Canada would benefit from more Asian investment in the country	% Agree	44%	41%	39%	46%	41%	40%	43%	49%	50%
	% Disagree	43%	53%	51%	42%	46%	38%	46%	37%	33%
Canada should provide economic incentives to encourage more Canadian companies to set up operations in Asia	% Agree	44%	44%	42%	43%	34%	38%	42%	54%	38%
	% Disagree	44%	44%	46%	44%	52%	43%	47%	37%	47%

 % is **higher** than other provinces and statistically significant
 % is **lower** than other provinces and statistically significant
 *caution: small base size in North (n = 56)

Base: All respondents: (n = 3,526)

Q14: Do you agree or disagree with each of the above statements on Canada's economic relations with Asia?

PERCEPTIONS OF ASIAN INVESTMENT IN CANADA

Canadian support for investment from Asia varies across both the country of origin and investment type; while investments from private enterprises find wide favour, when it comes to investment from state-owned enterprises, Canadians are more cautious.

In our 2016 survey we used two distinct scenarios to measure support for Asian investment. One-half

of the respondents received a question worded, “If a company, bank or investment fund controlled by a foreign government (i.e. state-owned) were trying to buy a controlling stake in a major Canadian company, how would you feel if the foreign government were...” The other half received a question worded, “If a privately owned foreign company wanted to make an investment in Canada, would you favour or oppose the investment if the company were from...” The same list of countries was used in both.

Canadians are generally opposed to investment from foreign state-owned companies

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
The government of Australia	% In favour	44%	33%	34%	46%	38%	47%	45%	50%	37%
	% Opposed	47%	64%	56%	45%	56%	41%	46%	43%	47%
The government of Japan	% In favour	32%	39%	25%	30%	26%	30%	32%	41%	27%
	% Opposed	59%	58%	65%	60%	68%	58%	60%	53%	57%
The government of South Korea	% In favour	22%	18%	18%	22%	16%	20%	23%	26%	21%
	% Opposed	68%	79%	71%	66%	77%	65%	68%	67%	63%
The government of India	% In favour	20%	12%	17%	17%	14%	21%	21%	23%	20%
	% Opposed	71%	85%	73%	74%	79%	67%	71%	70%	64%
The government of Malaysia	% In favour	13%	9%	15%	10%	8%	13%	11%	18%	13%
	% Opposed	74%	88%	75%	76%	81%	70%	76%	70%	67%
The government of China	% In favour	11%	12%	9%	9%	7%	16%	11%	14%	12%
	% Opposed	80%	85%	82%	80%	87%	73%	80%	81%	72%

 % is higher than other provinces and statistically significant
 % is lower than other provinces and statistically significant
 *caution: small base size in North (n = 27)

Base: All respondents: (n = 1,789)

Q15A: If a state-owned company were trying to buy a controlling stake in a major Canadian company, how would you feel if the foreign government were...

Canadians support investment by foreign privately owned companies; Quebec is most supportive of private investment from Asia

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
Australia	% In favour	84%	86%	82%	83%	84%	77%	87%	84%	82%
	% Opposed	7%	12%	8%	10%	8%	9%	7%	7%	5%
Japan	% In favour	77%	79%	77%	74%	70%	69%	78%	81%	74%
	% Opposed	14%	15%	13%	17%	22%	17%	15%	10%	12%
South Korea	% In favour	66%	70%	66%	66%	58%	56%	70%	65%	63%
	% Opposed	22%	21%	22%	23%	30%	25%	21%	22%	21%
India	% In favour	63%	71%	65%	60%	60%	53%	65%	65%	62%
	% Opposed	25%	20%	25%	29%	29%	28%	26%	23%	23%
Malaysia	% In favour	55%	64%	50%	53%	46%	47%	57%	58%	57%
	% Opposed	30%	27%	33%	34%	37%	31%	31%	24%	23%
China	% In favour	51%	42%	45%	43%	49%	49%	51%	58%	59%
	% Opposed	38%	52%	44%	47%	42%	34%	41%	30%	27%

 % is **higher** than other provinces and statistically significant
 % is **lower** than other provinces and statistically significant
 *caution: small base size in North (n = 29)

Base: All respondents: (n = 1,737)

Q15B: If a privately owned foreign company wanted to make an investment in Canada, would you favour or oppose the investment if the company were from...

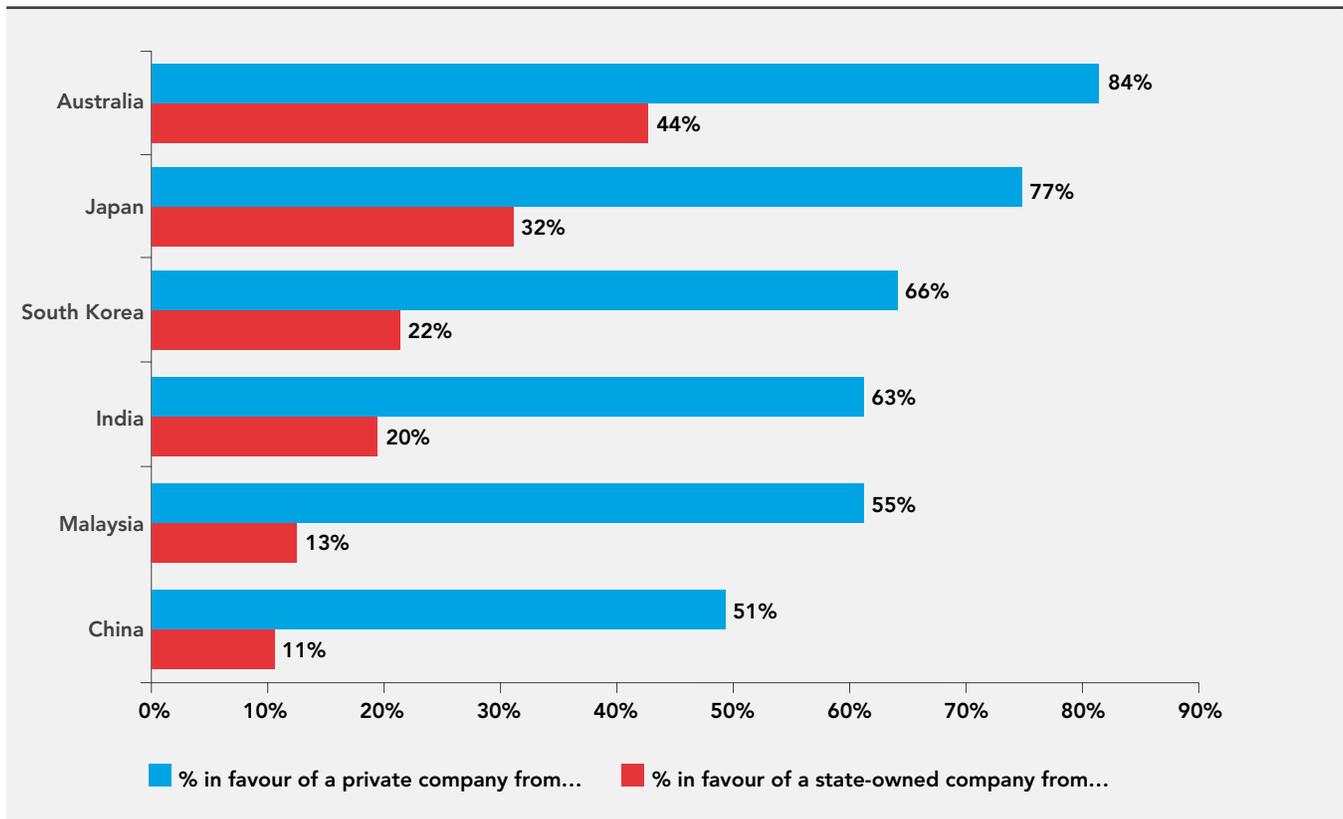
The hypothetical ‘private investment’ is supported significantly more than the hypothetical ‘state-owned investment.’ The gap in support is approximately 40 percentage points across countries. For instance, 84 per cent favour a private investment from Australia, while only 44 per cent favour a state-owned investment. No matter the country in question, there is never a majority in favour of a state-owned investment.

After Australia, Japan’s investment is the most highly favoured, at 77 per cent for private and 32 per cent for state-owned investment. This is consistent with the very positive views Canadians expressed about Japanese investment in APF

Canada’s 2015 *Canadian Views on Asian Investment* survey report.⁸ Next is South Korea, at two-thirds (66%) for private and 22 per cent for state-owned. When the hypothetical investment came from India, 63 per cent favour private investment and 20 per cent state-owned.

Canadians are more divided on investment from China and Malaysia. For China, a majority (51%) favour a private investment, while only 11 per cent favour a state-owned investment. Similarly, for Malaysia, over half (55%) favour a private investment, while 13 per cent favour a state-owned investment.

Canadians show a strong preference for foreign investment from private companies over state-owned companies



Base: All respondents (n = 1,789)

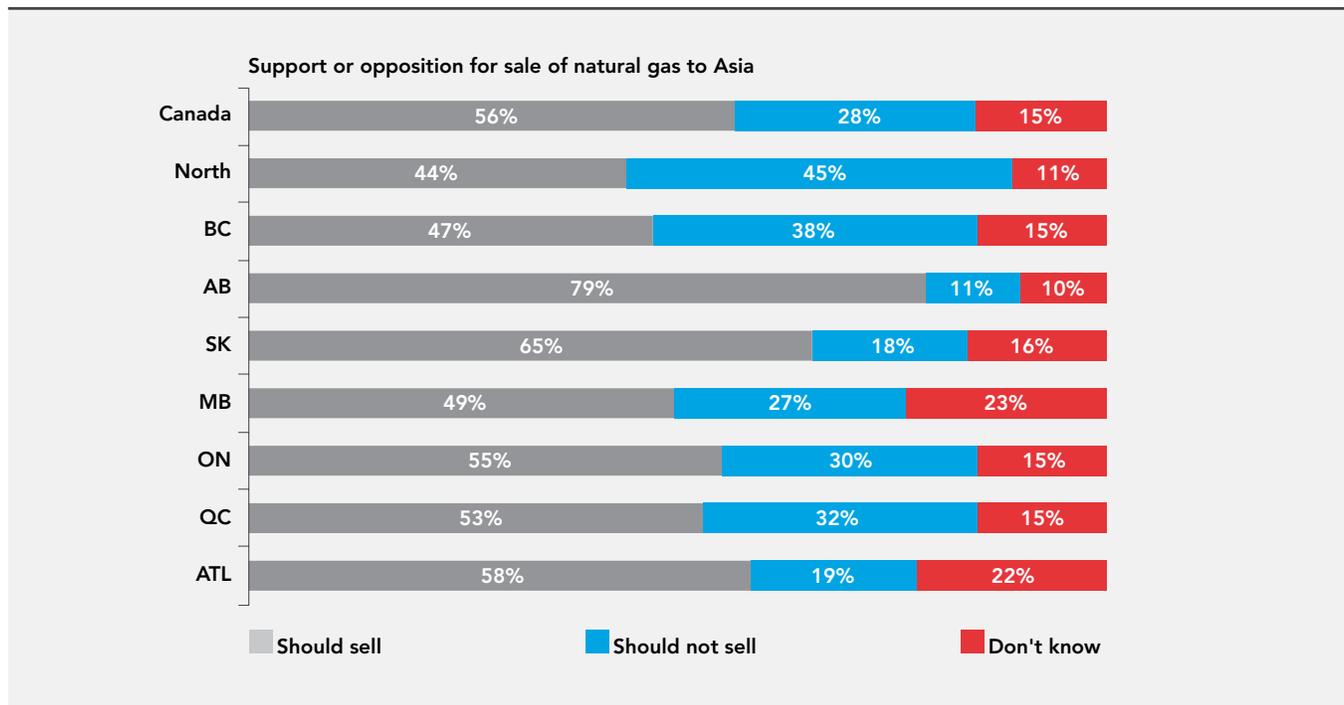
Q15: If a state-owned or private company were trying to buy a controlling stake in a major Canadian company, how would you feel if the company were from or the foreign government were...

Investment flows from both countries have been in the news recently, particularly in British Columbia. The Malaysian state-owned energy company Petronas has been in protracted negotiations over a natural gas project that would see the company ship gas to Asian markets. Chinese investment has made waves in recent years, but has been a particularly hot topic in connection with residential real estate.

Two questions were asked to explore these issues further. First, respondents were provided succinct

arguments both for and against selling natural gas to Asia, and asked which response reflected their view: either “Canada should not sell natural gas to Asia,” or “Canada should sell natural gas to Asia.” A majority (56%) think “Canada should sell natural gas to Asia,” while about one-quarter (28%) think “Canada should not sell natural gas to Asia.” Canadians broadly support the idea of selling natural gas to Asia, with older, higher-educated, higher-income, and male respondents expressing the greatest support.

Support for sale of natural gas to Asia is highest in Alberta, lowest in the Territories

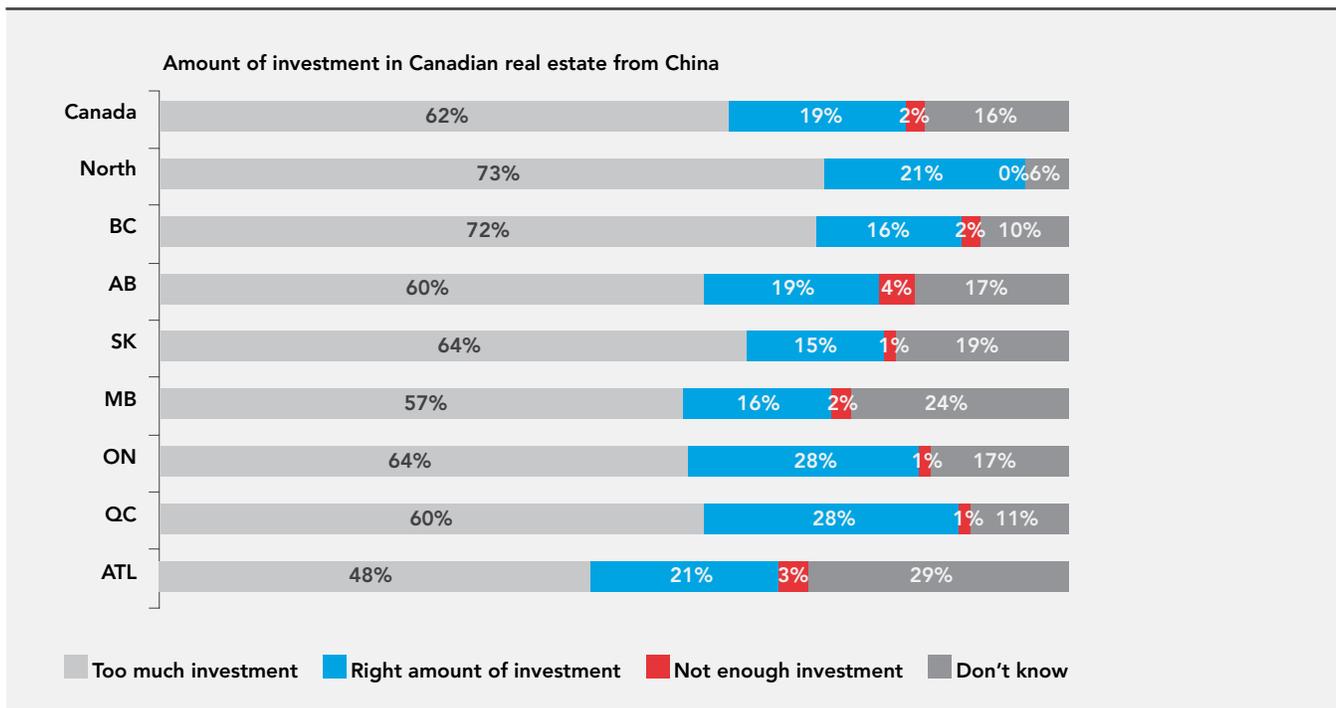


Base: All respondents: (n = 3,526)
 Q20: Which statement best reflects your view on the sale of natural gas to Asia?

Second, respondents were asked about Chinese investment in the Canadian real estate sector. Our question came from a 2015 survey of Australians conducted by the Lowy Institute, and asked, “Overall, do you think the Canadian government is allowing too much investment, allowing about the right amount of investment, or not allowing enough investment in Canadian residential real estate from China?”⁹ Sixty-two per cent indicated the government is “allowing too much investment,” 19 per cent said, “allowing about the right amount

of investment,” and just two per cent, “not allowing enough investment.” This breakdown was similar to the results from the Lowy Institute poll, which found that 70 per cent of Australians felt the government was allowing too much investment, 21 per cent felt it was the right amount, and just three per cent said it was not allowing enough investment. Not surprisingly, B.C. is the region with one of the highest proportions (72%) selecting “allowing too much investment,” no doubt influenced by rising housing prices in Metro Vancouver.

Canadians are generally concerned about the level of Chinese investment in Canadian real estate



Base: All respondents: (n = 3,526)

Q13: Overall, do you think the Canadian government is allowing too much investment, allowing about the right amount of investment, or not allowing enough investment in Canadian residential real estate from China?

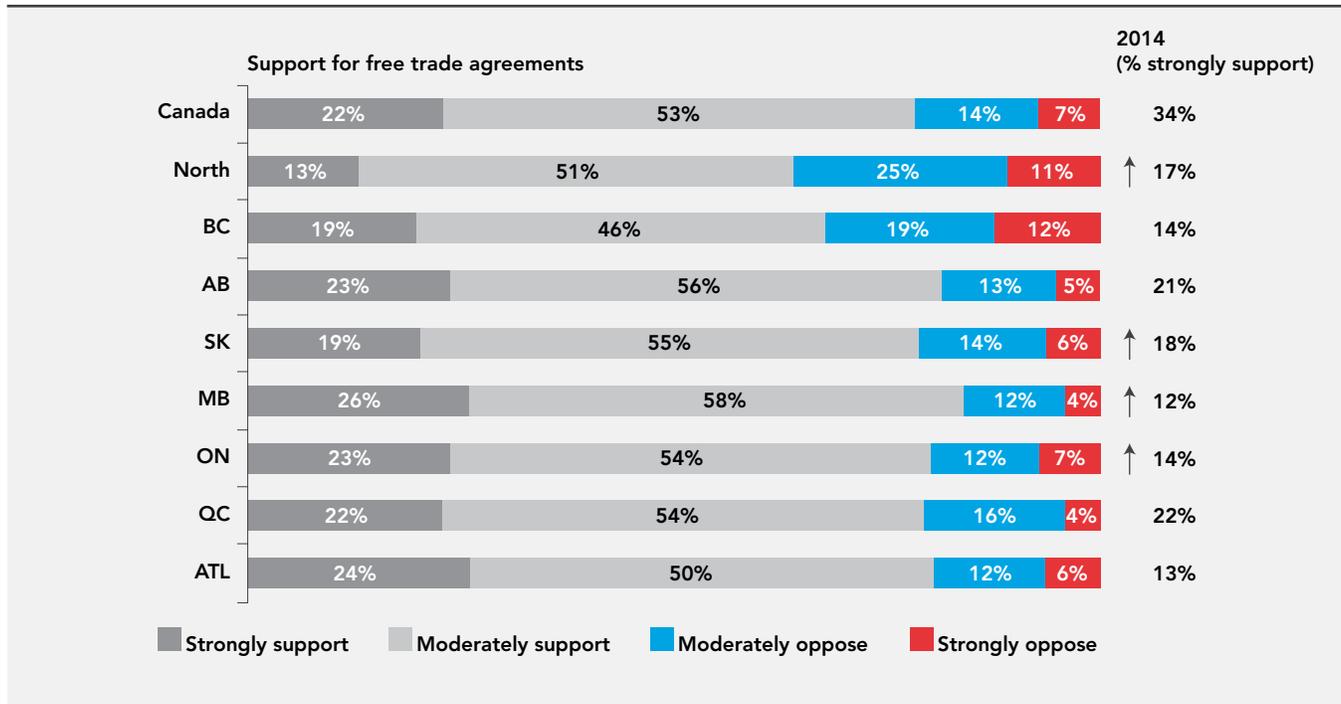
VIEWS TOWARD TRADE

A nation of free traders, Canadians welcome FTAs with partners in Asia, with views on a possible FTA with China more positive than they were in 2014.

The goal of increasing trade ties with Asian countries was a significant part of the Prime Minister’s mandate letter to the Minister of International Trade, Chrystia Freeland, with India and China

identified as key, fast-growing markets.¹⁰ But what does the Canadian public think of international trade agreements? Despite the recent talk of a public backlash against trade, especially in the U.S., there was little evidence of this sentiment in our poll results. Three quarters (75%) of Canadians say they support free trade agreements in general, a number higher than our polls in 2015 (66%) and 2014 (68%).

Canadians increasingly support free trade agreements



Base: All respondents: 2014 (n = 3,487), 2016 (n = 3,526)
 Q16: In general, do you support or oppose free trade agreements between Canada and other countries?
 Arrows indicate statistically significant year-on-year change.
 Respondents who answered “do not know” are excluded from this table; therefore totals do not necessarily add up to 100.

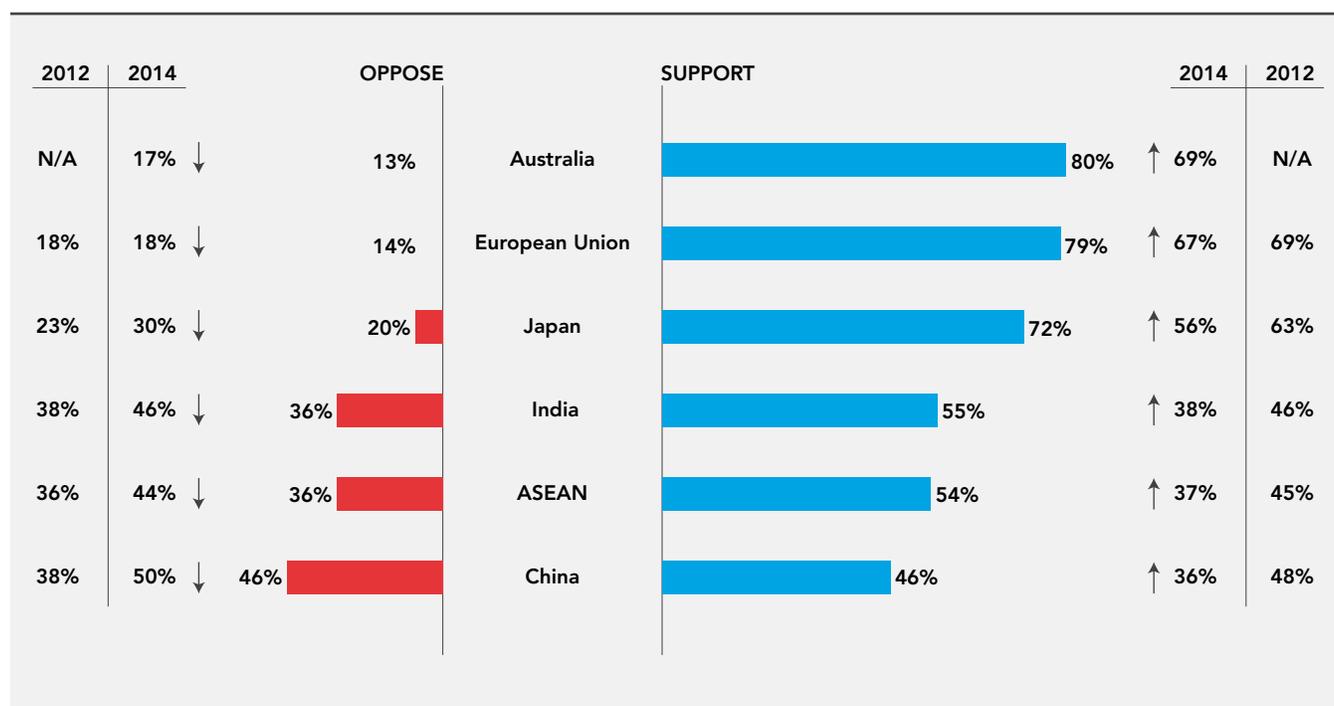
Turning to individual partners, support for trade agreements is as high as it has been. Four-fifths (80%) of Canadians support a free trade agreement with Australia. This is similar to results from past surveys. Canada’s trade agreement with the European Union has faced some procedural challenges, most recently with the United Kingdom’s vote to exit the EU. Despite these bumps in the road, Canadian opinion remains solidly behind an agreement, with 79 per cent supporting an FTA with the EU.

After Australia and the EU, Japan garners the next highest level of support as a potential free trade partner. Almost three-quarters (72%) express support for a Canada-Japan FTA. This is similar

to our 2015 survey (70%), and much higher than in 2014 (56%). There is also a majority of support for an FTA with India (55%) and the Association of Southeast Asian Nations (54%). Both of these indicators are up significantly from 2014, when they stood at 38 per cent for India and 37 per cent for ASEAN.

Views on China were more divided. Forty-six per cent express support for a Canadian FTA with China, while 46 per cent express opposition. While division exists, views on a possible FTA with China are more positive than they were in 2014, when 50 per cent opposed and 36 per cent supported.

Canadian support for free trade agreements has grown

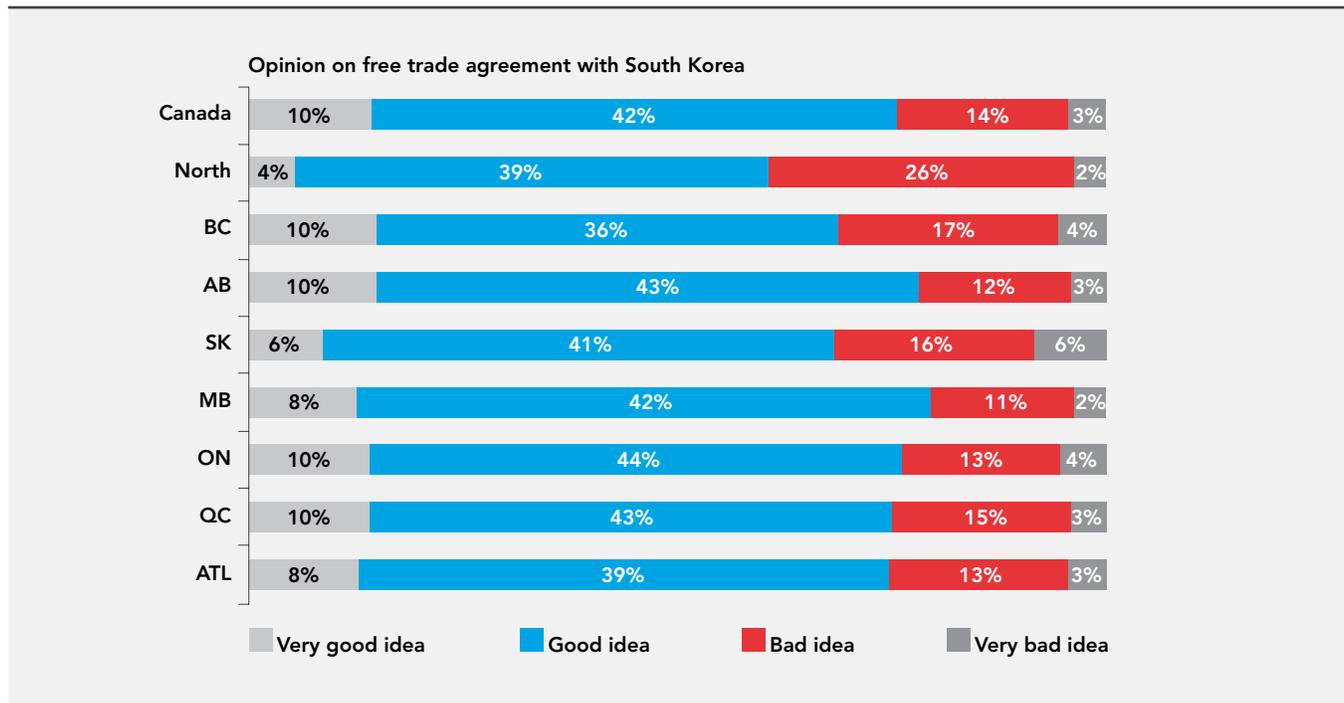


Base: All respondents: 2012 (n = 3,129), 2014 (n = 3,487), 2016 (n = 3,526)
 Q17: Do you support or oppose the Canadian government entering into a free trade agreement with each of the following countries or regional associations
 NA: No data available
 Arrows indicate statistically significant year-on-year change

Shortly after APF Canada’s 2014 survey was complete, Canada and South Korea announced the completion of the Canada-Korea Free Trade Agreement. At that point, support and opposition to the agreement was equally divided, both at 41 per cent. In 2016, respondents were reminded

of the trade deal and asked, “Do you think it was a good idea or a bad idea for Canada to sign this agreement?” Two years on, there is less division on the merits of the agreement. Half (52%) think the agreement was a good idea and only 17 per cent said it was a bad idea.

Canadians felt that entering into the free trade agreement with South Korea was a good idea



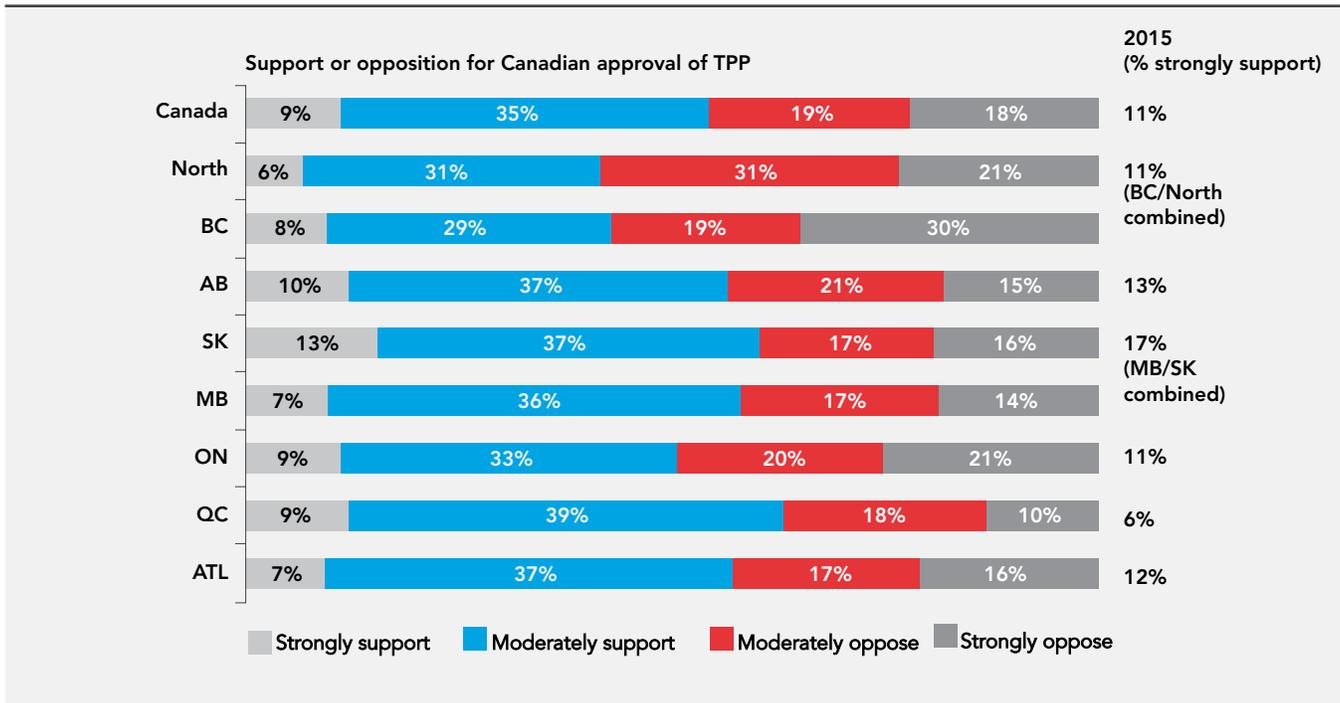
Base: All respondents: (n = 3,526)

Q18: Canada entered into a free trade agreement with South Korea in 2014. Do you think it was a good idea or a bad idea for Canada to sign this agreement? Respondents who answered “do not know” are excluded from this table; therefore totals do not necessarily add up to 100.

On the Trans-Pacific Partnership, opinions remain divided, though support has ticked up slightly. Forty-four per cent express support for the

agreement, while 37 per cent indicated opposition. In contrast, results from 2015 had support at 41 per cent and opposition at 38 per cent.

Canadian support for the TPP has grown slightly since 2015



Base: All respondents: 2015 (n = 1,554), 2016 (n = 3,526)

Q19: Based on what you have read, seen, heard or know about the Trans-Pacific Partnership (i.e. the proposed regional free trade agreement among Asia Pacific countries), to what degree do you support or oppose Canada's government approving the TPP?

Respondents who answered "do not know" are excluded from this table; therefore totals do not necessarily add up to 100.

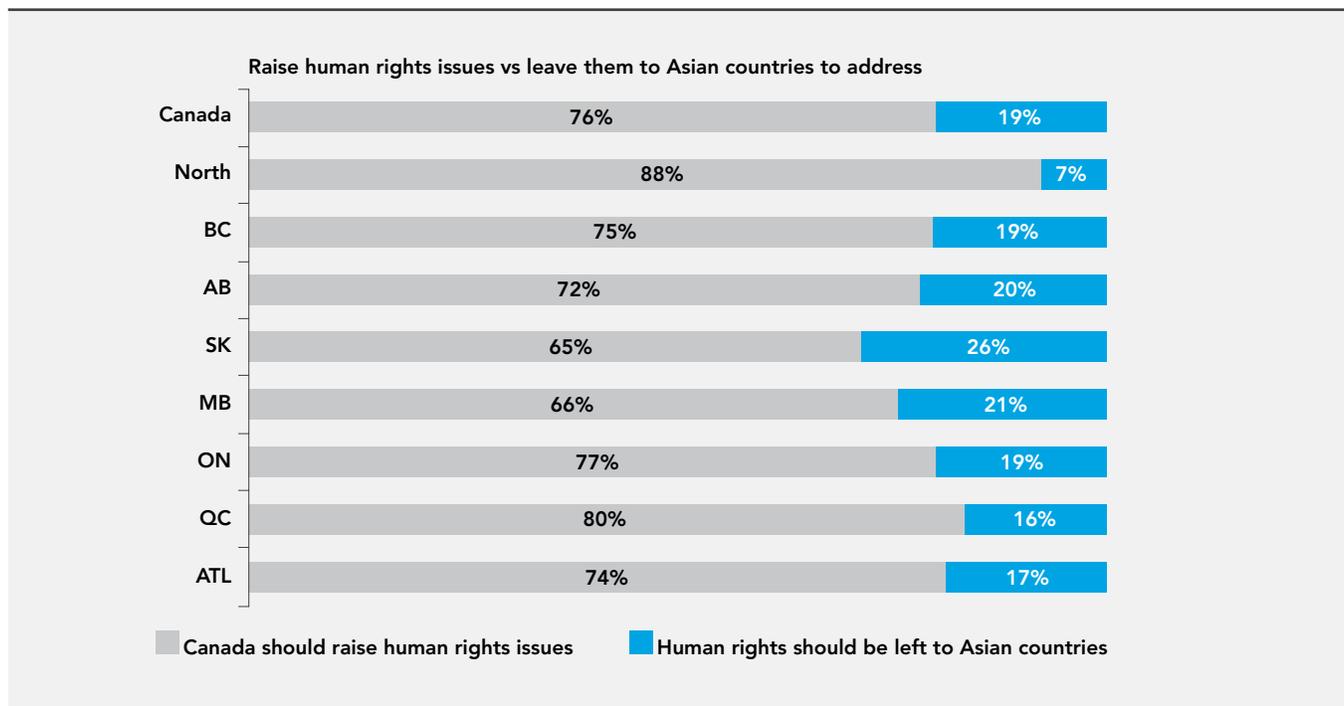
PROMOTING HUMAN RIGHTS

Canadians are willing to sacrifice economic gains at home if it means supporting human rights in the Asia Pacific.

The role of human rights promotion has been in the Canadian news recently, with Prime Minister Justin Trudeau noting the need for work on human

rights and governance in China when discussing the possibility of an FTA.¹¹ During Indian Prime Minister Modi’s visit to Canada in 2015, a Sikh group filed a complaint against the visiting PM to the Attorney General of Canada regarding a deadly riot that occurred under his watch.¹² These human rights issues and others have animated public debate about Canada’s relations with Asia.

Canadians believe that Canada should raise human rights issues in its relations with Asian countries



Base: All respondents: 2016 (n = 3,526)

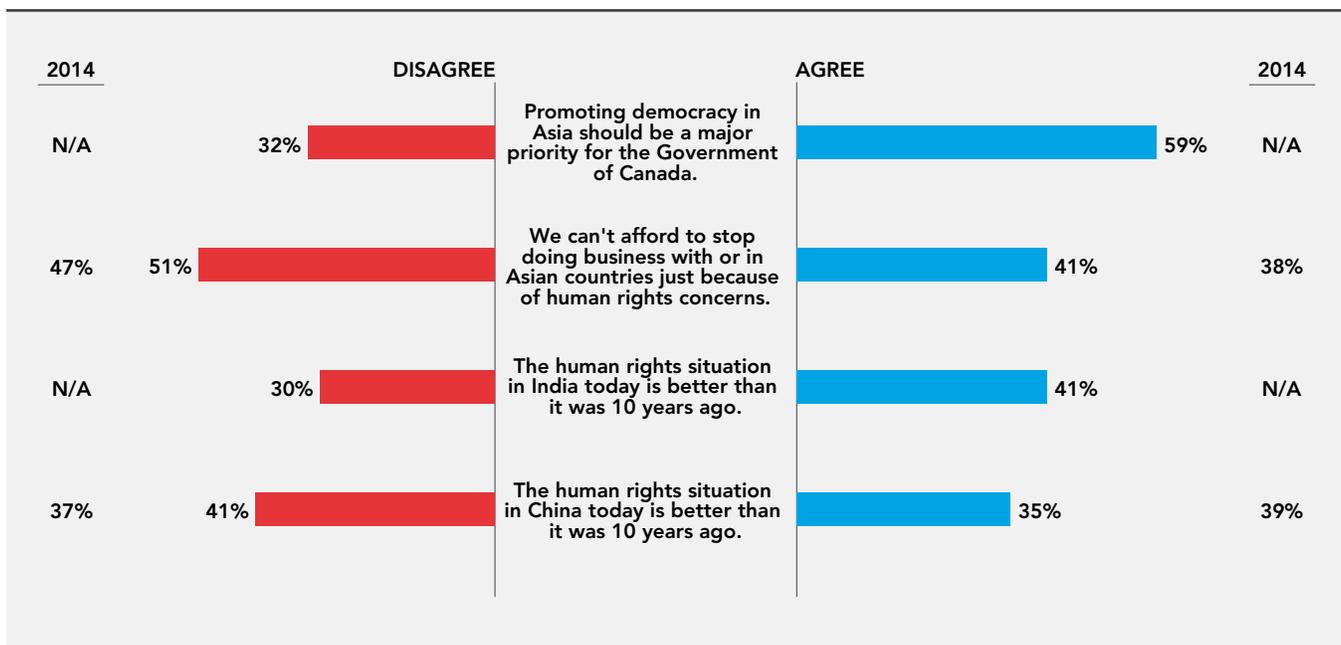
Q25: Do you think Canada should raise human rights issues in its relations with Asian countries or do you think human rights issues are more of a local concern that should be left to Asian countries to address themselves?

Respondents who answered “do not know” are excluded from this table; therefore totals do not necessarily add up to 100.

Canadians do express concern for human rights, and see rights promotion as an important piece of Canadian foreign policy. When asked to agree or disagree with the statement, “We can’t afford to stop doing business with or in Asian countries just because of human rights concerns,” a majority (51%) disagreed. Furthermore, a majority (59%) agree with the statement, “Promoting democracy in Asia should be a major priority for the Government of Canada.” Together, these responses indicate a willingness to promote political rights abroad, even if it interferes with commercial relations.

It is often concerns over human rights that colour Canadians’ mood about a country. Approximately one-third (35%) agreed with the statement, “The human rights situation in China today is better than it was 10 years ago.” This was down from 39 per cent in 2014, and significantly below the result of 47 per cent in 2010. Canadians are a little more optimistic on India; 41 per cent agree that, “The human rights situation in India today is better than it was 10 years ago.” Only 30 per cent disagree.

Canadians agree that promoting democracy in Asia should be a major priority for the Government of Canada



Base: All respondents: 2014 (n = 3,487), 2016 (n = 3,526)
 Q24: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries in the area of human rights?
 NA: No data available

Some argue that countries like Canada and China do not always agree on human rights issues because they have divergent understandings of the concept of “human rights.” Where Canadians emphasize political rights, like freedom of speech and political association, Chinese officials emphasize issues of development and material well-being. For example, during Chinese foreign minister Wang Yi’s dispute this summer with a Canadian reporter’s question about political rights, he asked, “Do you know that China has lifted more than 600 million people out of poverty?”¹³

To explore this possible disconnect, respondents were provided with a list of human rights and asked to select which ones they considered “fundamental.” The list was modified from a similar survey question conducted in 2009 by the United Kingdom-based Equality and Human Rights Commission.¹⁴

Eighty-nine per cent selected “Being able to express your views freely” as a fundamental human right. A significantly lower number, 77 per cent, indicated that “Being guaranteed an adequate standard of living, such as food, health care and housing” is a fundamental human right. Compared to socio-economic rights, Canadians closely associate human rights with political rights, like free speech and voting.

Just as important as Canadians’ concerns over political trends in China is their anxiety about the effect of China’s rising power here in Canada. Respondents were asked to agree or disagree with the statement “China’s growing economic presence in Canada is a direct threat to Canadian values and way of life.” Canadians were split on this question, with 46 per cent agreeing and 48 per cent disagreeing.

CANADA-ASIA SECURITY ISSUES

Canadians have a gloomy outlook on Asia Pacific security, but they are also reluctant to get involved.

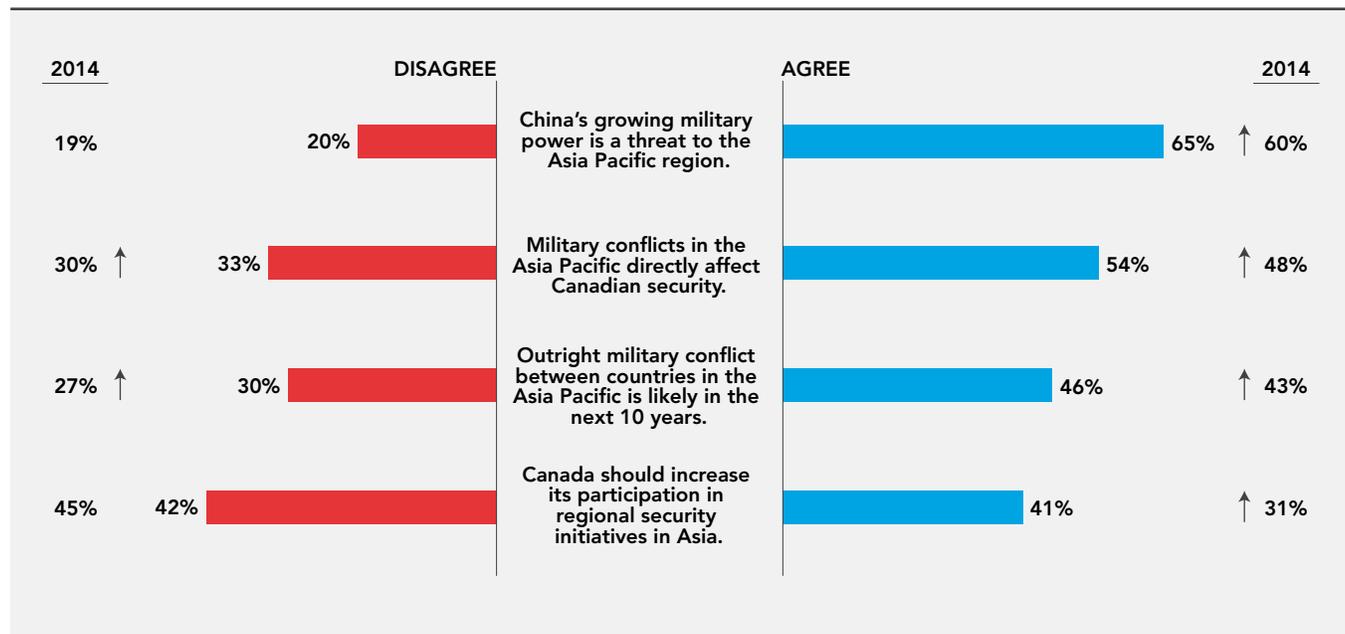
The recent international tribunal ruling on claims to islands and shoals in the South China Sea underlines the occasionally tense security situation in East and Southeast Asia. As China’s economic and military power has expanded, it has also increasingly come into disputes with its neighbours, though the disagreements have not escalated into open conflict as of yet.

Consistent with previous years, Canadians identify Asia Pacific security as a growing problem, but prefer to keep their distance from disputes. Sixty-

five per cent agree that “China’s growing military power is a threat to the Asia Pacific region,” up slightly from 60 per cent in 2014. Canadians are also pessimistic about the region’s powers getting along. Forty-six per cent of Canadians agreed with the statement, “Outright military conflict between countries in the Asia Pacific is likely in the next 10 years,” while only 30 per cent disagreed.

A majority (54%) agree that “Military conflicts in the Asia Pacific directly affect Canadian security.” Nonetheless, only 41 per cent agree that “Canada should increase its participation in regional security initiatives in Asia.” Agreement is higher than it was in 2014 (31%), but still lower than the percentage of Canadians who disagreed with increasing Canadian participation (42%) in the region.

Canadians are increasingly concerned about military conflicts in the Asia Pacific



Base: All respondents: 2014 (n = 3,474), 2016 (n = 3,526)
 Q28: Do you agree or disagree with each of the following statements about Canada’s relations with Asian countries?
 Arrows indicate statistically significant year-on-year change

PROVINCIAL PERSPECTIVES

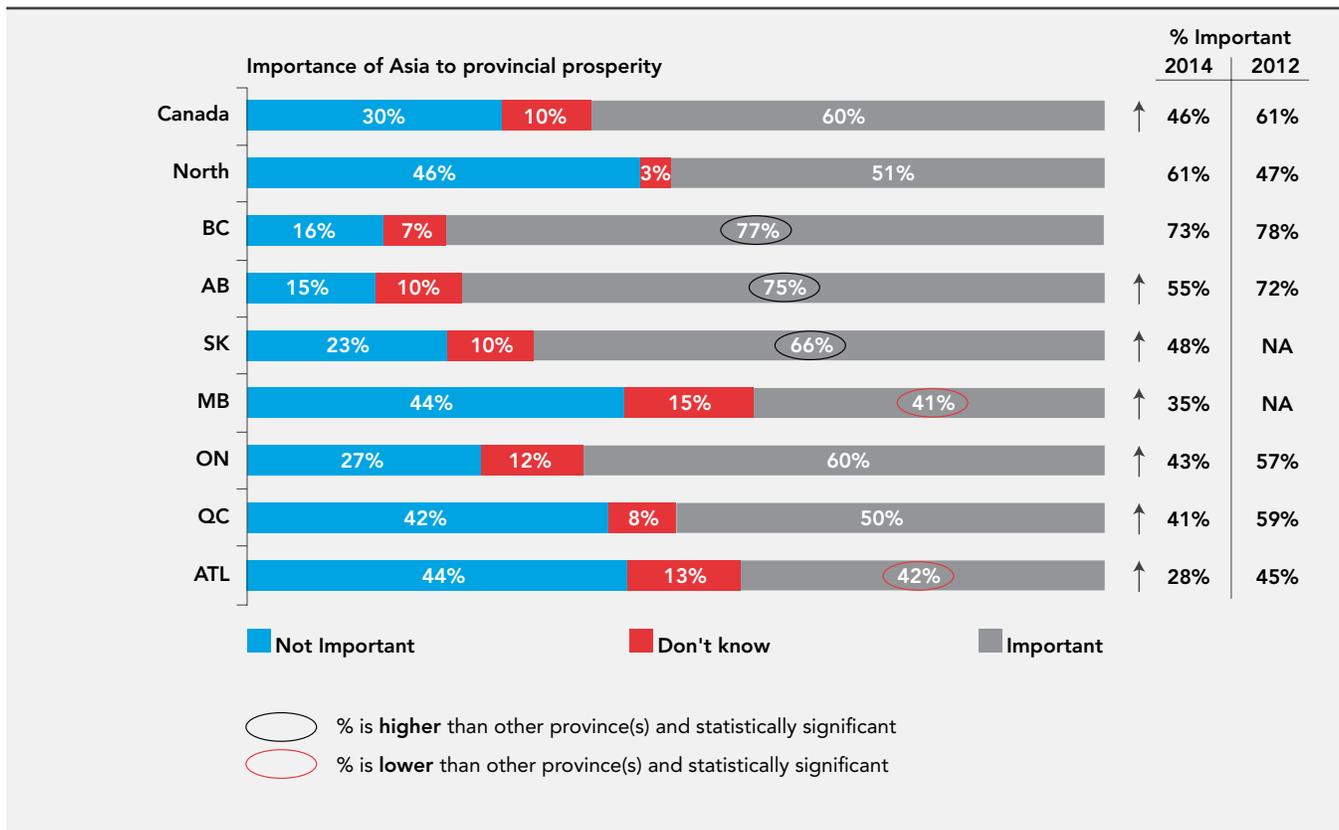
Canadians recognize the growing importance of Asia to the prosperity of their home provinces, and support increased educational connectivity in particular.

Canada’s provinces have been increasingly at the forefront of our country’s engagement with Asian partners. Premiers and provincial ministers regularly travel to the region, and several of the larger provinces have set up offices to facilitate

trade and investment. Educational institutions have also been busy recruiting students, setting up internship programs, and signing partnership agreements.

In line with the crucial role played by provinces, respondents were asked, “Generally speaking, would you say that Asia is important or not important for your province’s prosperity?” Sixty per cent responded that Asia is important to their province’s prosperity. This is up significantly from 46 per cent in 2014.

Canadians generally feel that Asia is important for their province’s prosperity



Base: All respondents: 2012 (n = 3,129), 2014 (n = 3,487), 2016 (n = 3,526)
 Q21: Generally speaking, would you say that Asia is important or not important for your province's prosperity?
 NA: No data available
 Arrows indicate statistically significant year-on-year change.

Canadians more likely to see Asian countries or regions as important for Canada’s prosperity

		CANADA	NORTH	BC	AB	SK	MB	ON	QC	ATL
United States	% High (6-7)	81%	84%	77%	80%	73%	73%	84%	82%	82%
	% Low (1-2)	2%	4%	2%	1%	2%	1%	2%	2%	1%
European Union	% High (6-7)	53%	46%	41%	50%	47%	50%	56%	58%	54%
	% Low (1-2)	2%	5%	2%	2%	2%	2%	2%	3%	2%
China	% High (6-7)	40%	40%	39%	42%	30%	34%	39%	43%	39%
	% Low (1-2)	5%	7%	6%	6%	8%	4%	5%	4%	3%
Japan	% High (6-7)	34%	45%	31%	36%	30%	32%	36%	37%	28%
	% Low (1-2)	3%	7%	2%	2%	3%	3%	3%	2%	2%
India	% High (6-7)	24%	32%	23%	24%	21%	21%	27%	23%	24%
	% Low (1-2)	6%	8%	5%	6%	9%	7%	5%	7%	4%
Australia	% High (6-7)	22%	17%	18%	23%	26%	26%	24%	21%	21%
	% Low (1-2)	8%	26%	8%	7%	6%	6%	9%	8%	5%
South Korea	% High (6-7)	16%	14%	16%	17%	12%	15%	16%	16%	15%
	% Low (1-2)	9%	10%	8%	11%	10%	10%	8%	9%	9%
Ass. of Southeast Asian Nations (e.g. Indonesia, Vietnam, the Philippines)	% High (6-7)	15%	21%	15%	14%	10%	17%	16%	18%	14%
	% Low (1-2)	10%	8%	9%	10%	8%	9%	10%	8%	9%

 % is higher than other provinces and statistically significant
 % is lower than other provinces and statistically significant
 *caution: small base size in North (n = 56)

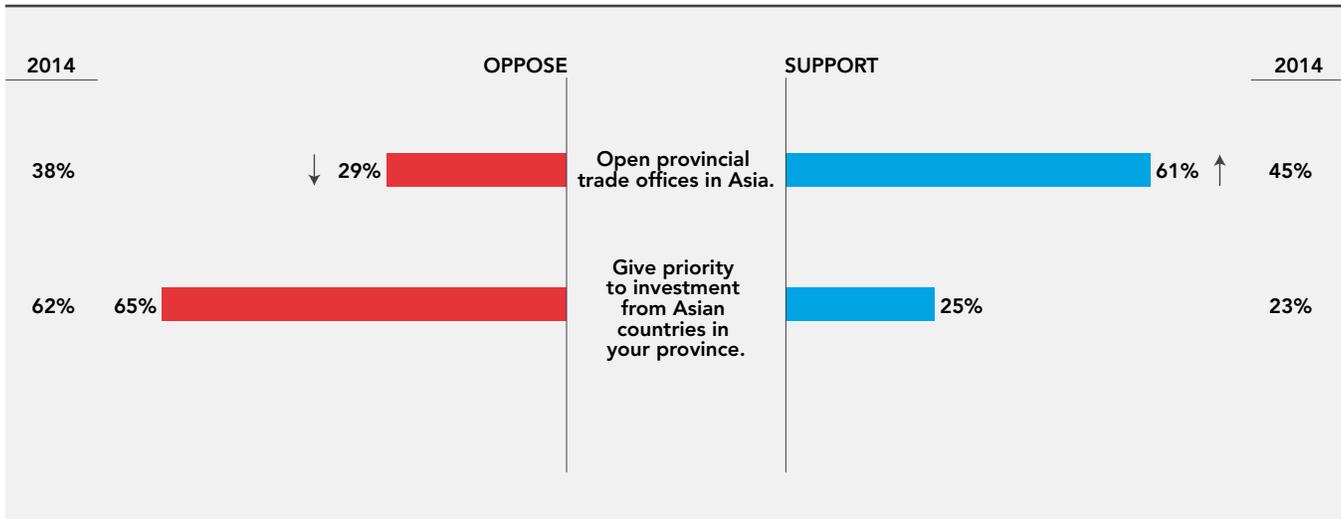
Base: All respondents: (n = 3,526)

Q11: Generally speaking, would you say each of the above countries or regions is important or not important to Canada’s prosperity?

Some aspects of provincial engagement with Asia win more support than others. A majority (61%) support opening provincial trade offices in Asia, up from 45 per cent in 2014. Few Canadians (25%)

support giving priority to investment from Asian countries, although this number is up from 2014 (23%).

Canadians show growing support for trade and investment policies that strengthen ties with Asia

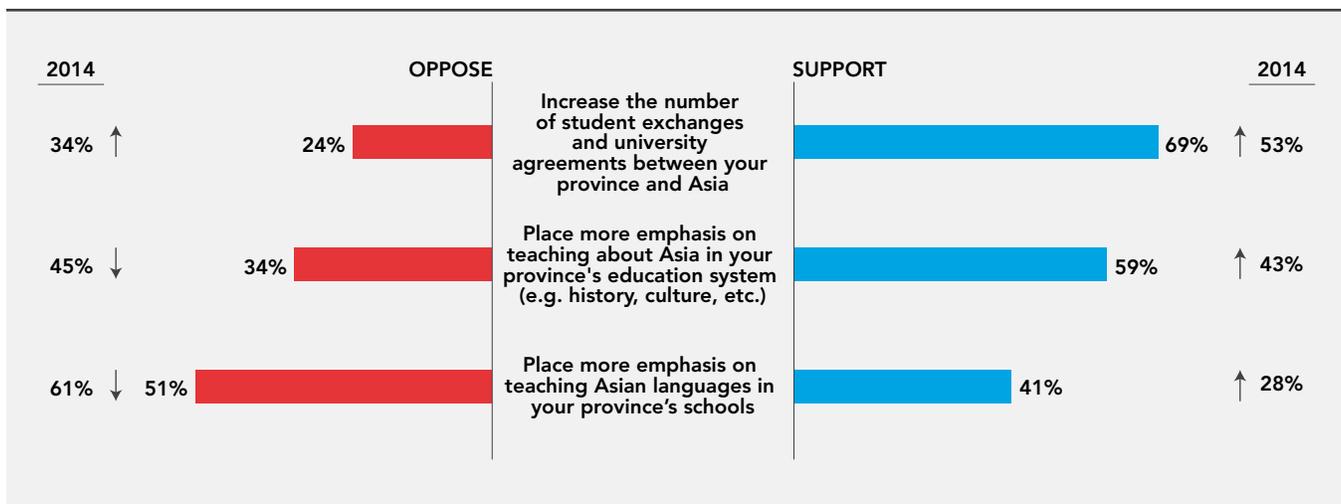


Base: All respondents: 2014 (n = 3,487), 2016 (n = 3,526)
 Q22a_b: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?
 Arrows indicate statistically significant year-on-year change

Canada has been behind peer countries like Australia and the U.S. in supporting educational exchange programs. Our poll indicates this is not due to a lack of public support. Canadians strongly (69%) support their provincial universities' efforts to increase student exchanges and education ties with Asian schools.

There is also majority support for placing more emphasis on teaching about Asia in the provincial education system. Fifty nine per cent would support increased educational content focused on Asia, up from 43 per cent in 2014. Canadians are more divided on placing more emphasis on teaching Asian languages in schools, however; only 41 per cent support emphasis on Asian languages, while a majority (51%) oppose.

Canadians have shown increased support for cultural exchanges and education on Asia



Base: All respondents: 2014 (n = 3,487), 2016 (n = 3,526)
 Q22c_e: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?
 Arrows indicate statistically significant year-on-year change

IMPLICATIONS FOR CANADA

Opinion toward economic engagement with Asian countries has bounced back from the historically low levels we saw two years ago. Whatever the reasons for the souring of opinion in our 2014 survey, the conditions have not been sustained. Canadians view Asia as a priority, which is in line with the current government's emphasis on India and China, as found in the public mandate letters to new federal ministers.

And although there is much sound and fury about trade, relations with China, and the TPP coming from politicians in the U.S., APF Canada data does not indicate any protectionist backlash in Canada.

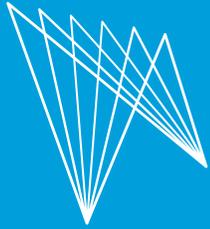
Canadians are supportive of trade agreements, and pursuing new opportunities for economic partnerships abroad remains broadly popular. As opinion on the South Korea trade agreement shows, these trade deals tend to get less controversial and more popular with time.

Canadians' continued support for trade does not mean they are exclusively interested in commercial matters, however. There is also broad support for infusing the promotion of human rights into Canada's foreign policy in Asia.

Our 2016 poll results reflect a public that wants a government that can multi-task across a range of core policy issues, and is open to the development of a mature relationship with Asia: one that is nuanced and takes into account Canadian values and national interests.

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