

ASIA PACIFIC

POINTS OF VIEW

OPINION PANEL

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Canada-China Free Trade Agreement

July 2012



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Background

- ◆ In this Points of View survey, the Asia Pacific Foundation of Canada asks Canadians who are engaged in Asia to consider different dimensions of Canada-Asia relations when it comes to negotiations for a potential Canada-China Free Trade Agreement (FTA). This includes:
 - Gauging priority countries for Canada's trade and investment.
 - Examining views on the pace of pursuing closer trade relations with China
 - Gauging possible impact of Canada-China free trade agreement on Canadian companies and on Canada's relations with other countries
 - Examining arguments in favour of and against Canada negotiating a free trade agreement with China
 - Determining key benefits of a Canada-China free trade agreement
 - Examining current barriers to trade with China
 - Determining support levels for possible Canadian actions in trade negotiations to make gains in a free trade agreement with China

- ◆ Points of View Asia Pacific findings provide private and public sector stakeholders who are engaged in Asia with insights from this unique audience of Asia practitioners whose "close to the ground" perspectives can help inform decision making.

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Key Findings



Key Findings

◆ Building economic trade relations with China is a Priority

- A majority of Asia practitioners (55%) believe Canada is moving too slowly in establishing economic and political relations with China. A third think we're moving at about the right pace. Few feel Canada is moving too quickly.
- Close to half of Asia practitioners (47%) see China as the top priority country for Canada as far as negotiations for a free trade agreement are concerned, three times higher than any other country.
 - Significantly fewer single out Japan (16%), India (15%), the European Union (11%), and South Korea (10%). At 2%, Thailand is very much out of the picture.

◆ Canada-China FTA seen to have positive impact

- More than 6-in-10 Asia practitioners believe that signing a free trade agreement with China would have a positive impact on Canada's relations with other Asian countries. They are less convinced of the impact on relations with our more traditional partners – the U.S. and the European.
 - Opinion is more divided on the impact of a Canada-China FTA on Canada-U.S. relations (38% positive, 33% neutral, 25% negative), and generally neutral when it comes to the European Union (50% neutral).
- Canadians engaged in Asia leave little doubt that a Canada-China FTA would lead to an increase in the level of activity their company or organization conducts in China – 66% state there would be an increase (including 20% who see a “significant increase”).



Key Findings

- ◆ **Key argument in favour of Canada-China FTA: The Chinese market offers significant trade and investment opportunities Canada cannot and should not ignore.**
 - A significant majority of Asia practitioners (90%) agree that China is the largest market in Asia, and that it makes sense for Canada as a trading nation to build a special relationship with China.
 - Indeed, by far, most feel Canada is not taking full advantage of the trade and investment opportunities with China; 86% agree that while China is Canada’s #2 trading partner, it represents only 7% of our total trade.
 - Over 4-in-10 Asia practitioners select these as the two most compelling of seven arguments in favour of Canada seeking to negotiate a free trade agreement with China.
 - Significantly, most Canadians engaged in Asia (74%) also believe a Canada-China FTA could secure an early advantage for access to the Chinese market ahead of other countries (e.g. the U.S. and European Union) seeking a similar deal with China.
 - 7-in-10 also believe that Canadian manufacturers would benefit from a closer Canada-China economic relationship through opportunities to build and expand their activities in China.
 - Interestingly, while most Asia practitioners (70%) feel a Canada-China FTA would help increase Canada’s political and diplomatic influence in the Asia region as a whole, far fewer – 50% – believe it would heighten our influence with the Chinese in other areas of our relationship (e.g. human rights).

Key Findings

- ◆ **Key argument against a Canada-China FTA: Concerns that FTA would put Canadian businesses at a disadvantage relative to Chinese companies.**
 - Close to half of Asia practitioners (46%) agree that, with a Canada-China FTA, Canadian businesses would not be competing on a level playing field, because Chinese economic system is not based on market forces. 44% single this point out as the most compelling of eight arguments against an FTA with China, well above all other arguments tested.
 - Almost as many Asia practitioners (39%) believe that an FTA with China would favour Chinese businesses over Canadian ones, because it's so much easier for Chinese businesses to invest in Canada.
 - Many Canadians engaged in Asia cite the following potential negative consequences of a Canada-China FTA:
 - The influx of cheap Chinese goods that would hurt Canadian manufacturers (32%).
 - The possibility that government-controlled Chinese companies would own a significant share of Canada's resource development (28%).



Key Findings

- ◆ **Key benefit of a Canada-China FTA: Create a rules-based system that brings clarity, reduced arbitrariness in decisions, and fairer treatment for Canadian businesses**
 - Broadly speaking, Asia practitioners view a Canada-China FTA as an opportunity to create a more appealing, consistent, and predictable environment in which they can do business. For them, the top three key benefits an FTA could bring include:
 - Three-quarters (76%) believe it could ensure Canadian goods would not be excluded from the Chinese market due to the application of arbitrary and discriminatory technical rules and standards.
 - A similar number – 73% – think an FTA with China would help set up a rules-based system where Canadian businesses would have recourse to remedies if they were excluded from the market.
 - And, close to 7-in-10 believe Canadian businesses would have their rights protected in China, with commitments to being treated the same as domestic Chinese businesses.
 - Further, Asia practitioners see benefits in the form of clearer rules for Chinese investment in Canada both more generally (65%), and particularly for the country’s state-owned enterprises (65%).



Key Findings

- ◆ **Key barriers to Canadian trade and investment in China: Negative effects of rules and regulations that discriminate, and limited avenue for recourse**
 - More than 7-in-10 Asia practitioners perceived three significant barriers to Canadian trade and investment in China:
 - Intellectual property rules (83%)
 - Weak dispute settlement mechanisms (79%)
 - Chinese government regulations that discriminate against foreign companies (72%)
 - A second tier of barriers relate directly to a lack of access to the Chinese market:
 - Restrictions of Canadian foreign investment in China (63%)
 - Lack of access to Chinese government procurement contracts (60%)

- ◆ **Asia practitioners willing to relax visa requirements for Chinese skilled workers, but resistant to liberalization on government procurement, investment from state-owned enterprises, and anti-dumping.**
 - A solid majority of Asia practitioners (66%) would support Canada relaxing its visa requirements to permit the free flow of skilled and professional workers move between the two countries,
 - However, they're significantly less supportive of concessions that give greater access to Chinese companies into the Canadian market:
 - Opening access to bid on Canadian governments' contracts at all levels (40% oppose)
 - Being flexible with rules for Chinese state-owned enterprises' investing in Canada (47% oppose)
 - Relaxing anti-dumping penalties on Chinese products coming into Canada (65% oppose)



Key Findings

General Observations

- ◆ From these key findings, we make the following general observations about how Asia practitioners perceive the idea of Canada negotiating a free trade or enhanced economic cooperation agreement with China:
 - First, the overall reaction of Asia practitioners to closer economic relations with China is overwhelmingly positive. This is most evident when one compares the overall level of agreement with the multiple arguments in favour of and against a Canada-China FTA (73% vs. 27%, respectively, on average). It also surfaces in the degree to which Asia practitioners believe such an agreement would offer major/moderate benefits to Canada across a wide range of areas touching Canadian trade and investment in China (63%, on average).

These overall positive trends are all the more important given that 80% of those surveyed have business or professional activities in Greater China, and 50% have on-the-ground operations there. They therefore reflect the views of people “in-the-know”, that is, business people and professionals who have the knowledge and experience of China, and see the potential that exists from building a closer economic relationship with Asia’s largest market. Importantly, however, there are no substantial differences in views on a Canada-China FTA among Asia practitioners without any direct business or professional connection to China *per se*, which suggests they may see opportunities for themselves to move into China, or expect positive trickle down impacts on their activities elsewhere in Asia.



Key Findings

General Observations (cont.)

- Second, it is quite clear from the findings that Asia practitioners perceive the idea of a Canada-China FTA as a practical and concrete way for Canada to take advantage of China's increasing global economic importance, and to do so early enough to position Canada favourably in Asia for the foreseeable future.

However, they are concerned about the potential impact a free trade agreement would have on Canadian businesses, notably the increased competition manufacturers would face with the influx of Chinese products and investments. They are also concerned about Chinese investments in our country's natural resource development, particularly from state-owned enterprises.

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Detailed Findings

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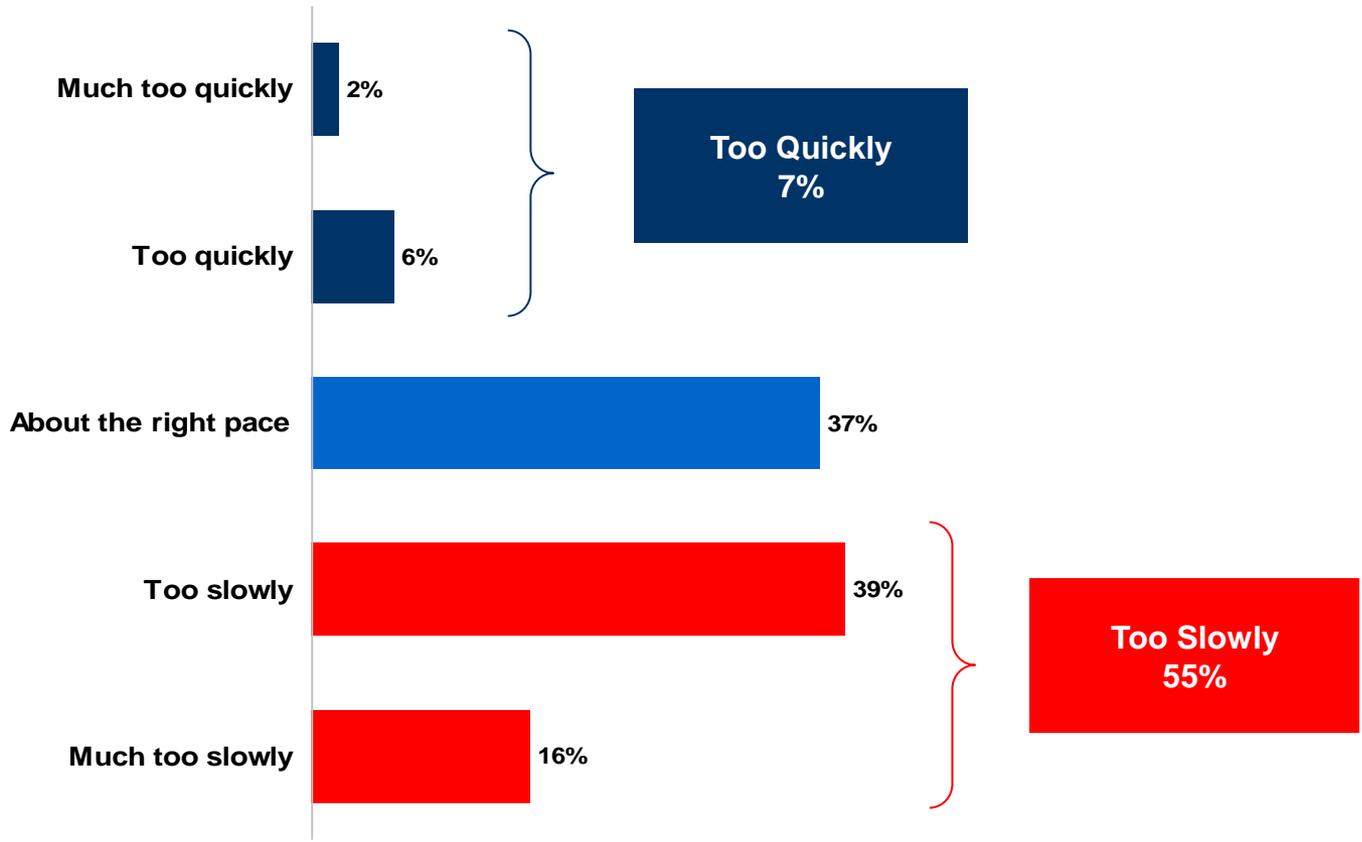


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Perceptions of Canada's Current Economic Relations with China

Perceptions of Pace of Canada Establishing Economic/Political Relations with China

Canadians engaged in Asia believe Canada is moving too slowly in establishing economic and political relations with China. Very few feel that Canada is acting too quickly in establishing closer relations.

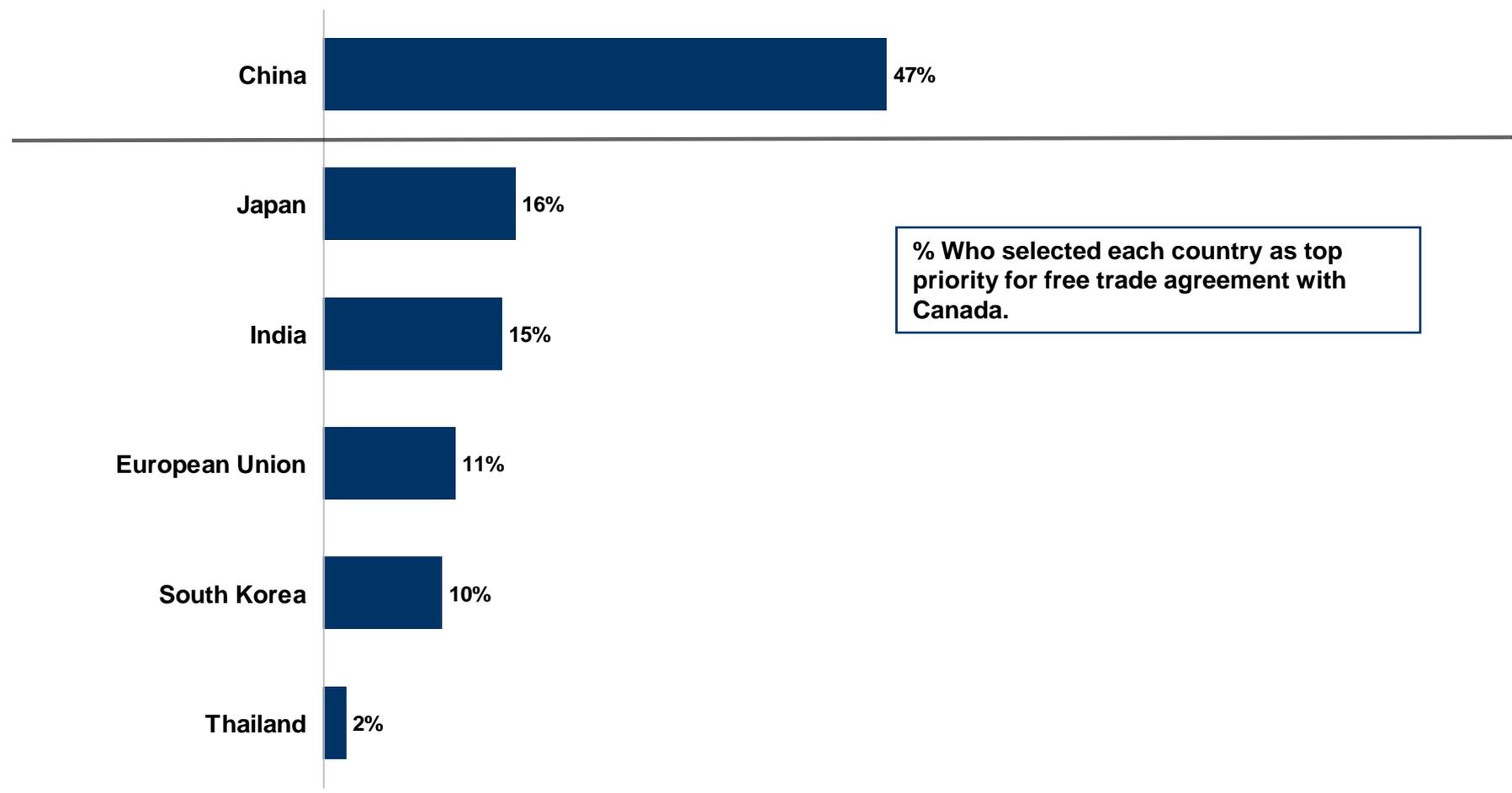


Base: (n=465)

Q.2 : Thinking specifically about China. Do you think Canada is moving too quickly or too slowly in trying to establish closer economic and political relations with China, or is it moving at about the right pace?

Country That Canadian Government Should Target as a Top Priority for Free Trade Agreement

Canadians engaged in Asia are much more likely to want the Canadian government to target China as the top priority for negotiating a free trade agreement.



% Who selected each country as top priority for free trade agreement with Canada.

Base: (n=451)

Q.1 : Which **one** of the following countries do you think the Canadian government should give top priority to in seeking to negotiate a free trade agreement, or something similar, such as an enhanced economic and trade cooperation agreement?

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Arguments For and Against a Canada-China Free Trade Agreement



Arguments For Canada-China FTA: Overview

- ◆ Asia practitioners are strongly convinced by many arguments in favour of a Canada-China free trade agreement. On average, 73% strongly or moderately agree with each of seven arguments tested.
- ◆ Two reasons related to **trade and investment opportunities** in a Canada-China FTA stand out from the rest:
 - 90% agree that China is the largest market in Asia, and that it makes sense for Canada as a trading nation to build a special relationship with China.
 - 86% agree that while China is Canada's #2 trading partner, it represents only 7% of our total trade. In essence, we're not taking full advantage of the opportunities.
 - Over 4-in-10 Asia practitioners select these as the two most compelling of the seven arguments in favour of Canada seeking to negotiate a free trade agreement with China.
- ◆ However, most Canadians engaged in Asia also have a **sense of urgency** about moving closer to China:
 - 74% believe a Canada-China FTA could secure an early advantage for access to the Chinese market ahead of other countries (e.g. the U.S. and European Union) seeking a similar deal with China; 65% say we need to act now, because the opportunity won't last forever.
- ◆ There are also strong sentiments that Canada would extract **benefits for business and for Canada's influence** in Asia:
 - 73% agree that Canadian manufacturers would benefit from a closer Canada-China economic relationship through opportunities to build and expand their activities in China.
 - 70% feel a Canada-China FTA would help increase Canada's political and diplomatic influence in the Asia region as a whole; far fewer – 50% – believe it would heighten our influence with the Chinese in other areas of our relationship (e.g. human rights).

Level of Agreement with Arguments IN FAVOUR of a Canada-China FTA



Base: (n varies from 429 to 433)

Q.3 : Recently, the Chinese government offered Canada the opportunity to enter into discussions about a free trade or enhanced trade and economic cooperation agreement between the two countries. Would you agree or disagree with each of the following arguments in favour of a potential Canada-China of this kind?

Arguments Against Canada-China FTA: Overview



- ◆ Asia practitioners are not as strongly convinced by many arguments against a Canada-China free trade agreement. On average, just 27% strongly or moderately agree with each of eight arguments tested.
- ◆ Two reasons related to perceived **disadvantages to Canadian businesses** stand out from the rest:
 - 46% agree that Canadian businesses would not be competing on a level playing field in China, because the country's economic system is not based on market forces.
 - 39% agree that a free trade agreement would favour Chinese businesses over Canadians, because it's easier for Chinese businesses to invest in Canada.
- ◆ Other reasons against a Canada-China FTA that resonate somewhat with Asia practitioners are related to the negative impact on the domestic Canadian market:
 - 32% think Canadian manufacturers would be hurt by the influx of cheap Chinese goods into Canada.
 - 28% feel that a Canada-China FTA could lead to government-controlled Chinese companies owning a significant share of Canada's natural resource development.
- ◆ Some – 26% – also worry that Canada should not jump too quickly into a free trade agreement with China, because it's economic future is not that certain.

Level of Agreement on Arguments AGAINST a Canada-China FTA



Strongly Agree Moderately Agree

Canadian businesses would not be competing on level-playing field, because Chinese economic system not based on market forces.



Any FTA with China favours Chinese over Canadians, because so much easier for Chinese businesses to invest in Canada.



Under any FTA with China, Canadian manufacturers would be significantly hurt by influx of cheap Chinese goods into Canada.



FTA with China is bad idea; could lead to government-controlled Chinese companies owning significant share Canada's natural resource development.



China's future economic outlook is far from certain; we should be more cautious in focusing too much on our trade relationship with China.



I don't trust the Chinese; only reason they want FTA with Canada is to benefit from our close economic integration with the United States.



Canada's already trying to complete FTA with the European Union; we'd be taking on too much to try to do the same thing with China.



China represents only 7% of Canada's trade; have other more important priorities than trying to sign a free trade agreement with China.



Base: (n varies from 427 to 430)

Q.5 : Would you agree or disagree with each of the following arguments against a potential Canada-China free trade agreement?

Potential Benefits of Canada-China FTA: Overview



- ◆ Broadly speaking, Asia practitioners believe a Canada-China FTA would provide benefits across a broad range of areas for Canada and Canadian businesses. On average, 63% rated each of 10 possible components of an FTA with China as a major or moderate benefit .
- ◆ Topping the list are three benefits related to creating a **more consistent and predictable environment** in which to do business:
 - 76% believe it could ensure Canadian goods would not be excluded from the Chinese market due to the application of arbitrary and discriminatory technical rules and standards.
 - 73% think an FTA with China would help set up a rules-based system where Canadian businesses would have recourse to remedies if they were excluded from the market.
 - 71% feel it would help establish closer people-to-people contacts.
- ◆ In a second tier of perceived benefits, Asia practitioners see advantages emerging in the form of Canadian businesses being treated the same as domestic Chinese businesses (68%, clearer rules for Chinese investment in Canada both more generally (65%), and particularly for China's state-owned enterprises (65%).

Perceived Potential Benefits of a Canada-China FTA



■ Major Benefit ■ Moderate Benefit

Ensure Canadian goods not excluded from Chinese market due to application of arbitrary / discriminatory technical rules and standards.



Help set up improved rules-based system in China; Canadian businesses would have recourse to remedies if they were excluded from the market.



Help establish closer people-to-people contacts through business, culture, and education, with longer term benefits for both countries.



Help protect rights of Canadian businesses in China, with commitments to treat them the same as domestic Chinese businesses.



Help define clearer rules for China's state-owned enterprises' investments in Canada.



Help bring order /clarity to the rules for Chinese investment in Canada.



Help reduce the trade imbalance Canada currently has with China.



Canadian firms would gain access to Chinese government contracts.



Bring greater transparency to how the Chinese government makes decisions on trade and investment matters.



Help provide framework for rule of law in China, including standards related to corporate social responsibility (e.g. corporate governance, etc).



Base: (n varies from 415 to 421)

Q.7 : To what extent do you think each of the following is a potential benefit to Canada having a free trade agreement with China? Please rate each one on a 7-point scale where 1 means it is not very much of a benefit, and 7 means it is a major benefit. Major benefit = 6,7 out of 7; Moderate benefit = 5 out of 7)

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Canadian Government Actions in FTA Negotiations

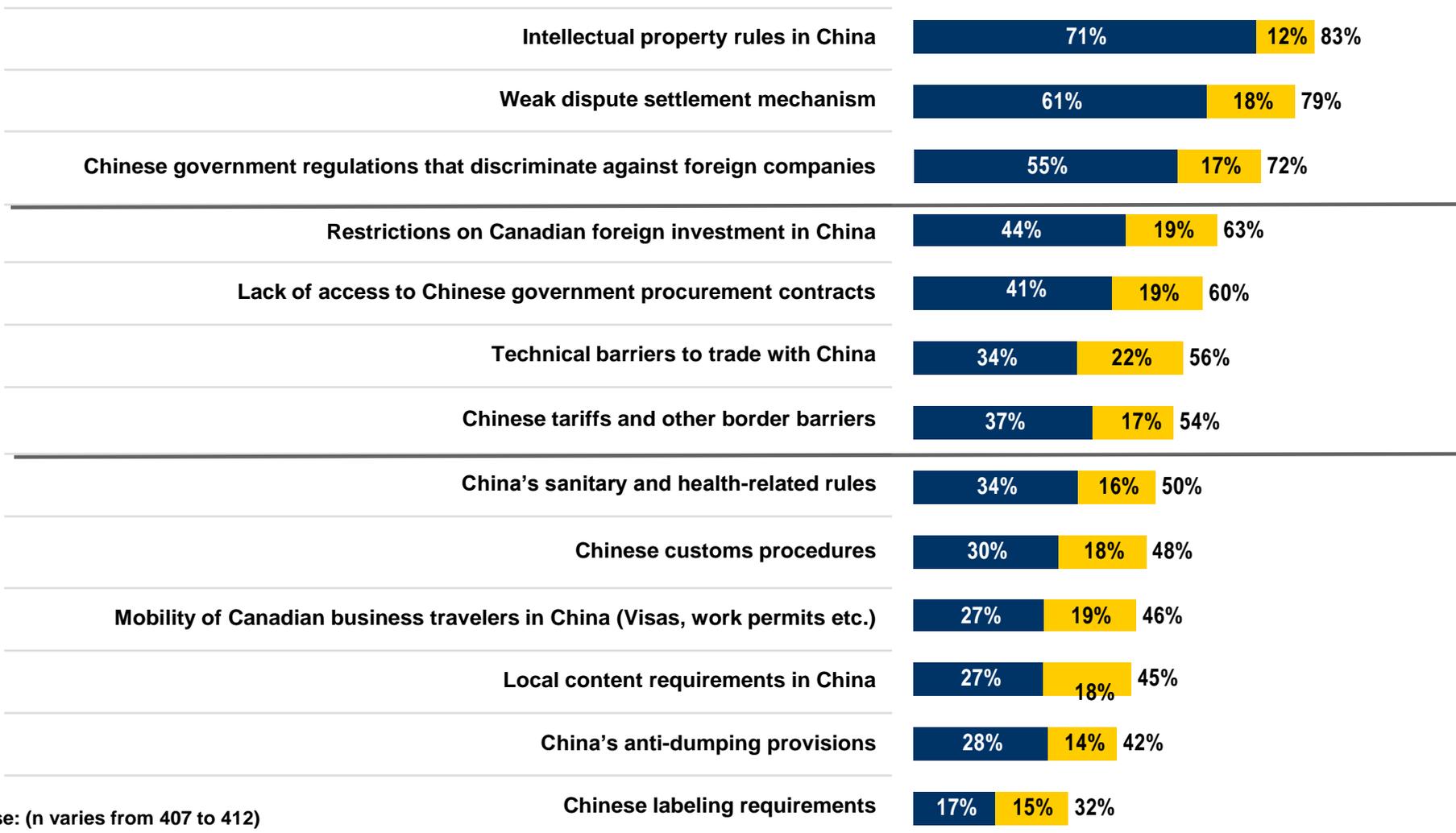
Barriers to Canadian Trade & Investment in China: Overview



- ◆ Asia practitioners single out the negative effects of **rules and regulations that discriminate**, and **limited avenue for recourse** as the most serious barriers to Canadian trade and investment in China:
 - Intellectual property rules (83%)
 - Weak dispute settlement mechanism (79%)
 - Chinese government regulations that discriminate against foreign companies (72%)
- ◆ A second tier of barriers relate directly to a **lack of access to the Chinese market**:
 - Restrictions of Canadian foreign investment in China (63%)
 - Lack of access to Chinese government procurement contracts (60%)
 - Technical barriers to trade (56%)
 - Tariffs and other border barriers (54%)



■ Major Barrier ■ Moderate Barrier



Base: (n varies from 407 to 412)

Q.9 : To what degree do you think each of the following issues is a major or minor barrier to Canadian trade and investment in China, and something Canadian negotiators should pay particular attention to in negotiating any free trade agreement with China? Please rate each one on a 7-point scale where 1 means it is only a minor barrier and 7 means it is a major barrier. (Major barrier=6,7 out of 7; Moderate barrier=5 out of 7)

Views on Canadian Gov't Actions to Make Gains in Negotiations for Canada-China FTA

Most Canadians engaged in Asia would support Canada relaxing visa requirements for skilled/professional workers if it would help Canada make gains in an FTA with China. They are much less supportive of relaxing anti-dumping penalties on Chinese products, being more flexible on rules for Chinese state-owned enterprises, and opening up access for Chinese companies to bid on Canadian government contracts.



Base: (n varies from 408 to 419)

Q.8 : In all trade negotiations, there is some give and take. To what degree would you support or oppose Canada taking the following actions in order to make gains in a free trade agreement with China?

Views on Canadian Gov't Actions to Negotiate Side Agreements with China



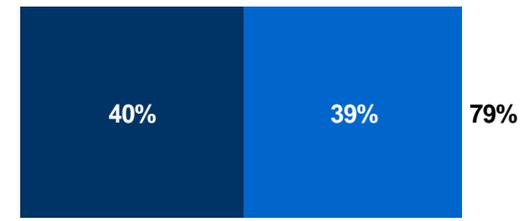
Vast majority of Canadians engaged in Asia support Canada working with China to sign side agreements on technical issues related to environmental standards and to labour standards.

Moderately Oppose **Strongly Oppose**

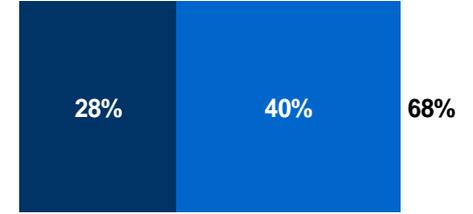
Strongly Support **Moderately Support**



Working with China to sign a side agreement on technical issues related to environmental standards.



Working with China to sign a side agreement on technical issues related to labour standards.



Base: (n varies from 408 to 419)

Q.8 : In all trade negotiations, there is some give and take. To what degree would you support or oppose Canada taking the following actions in order to make gains in a free trade agreement with China?

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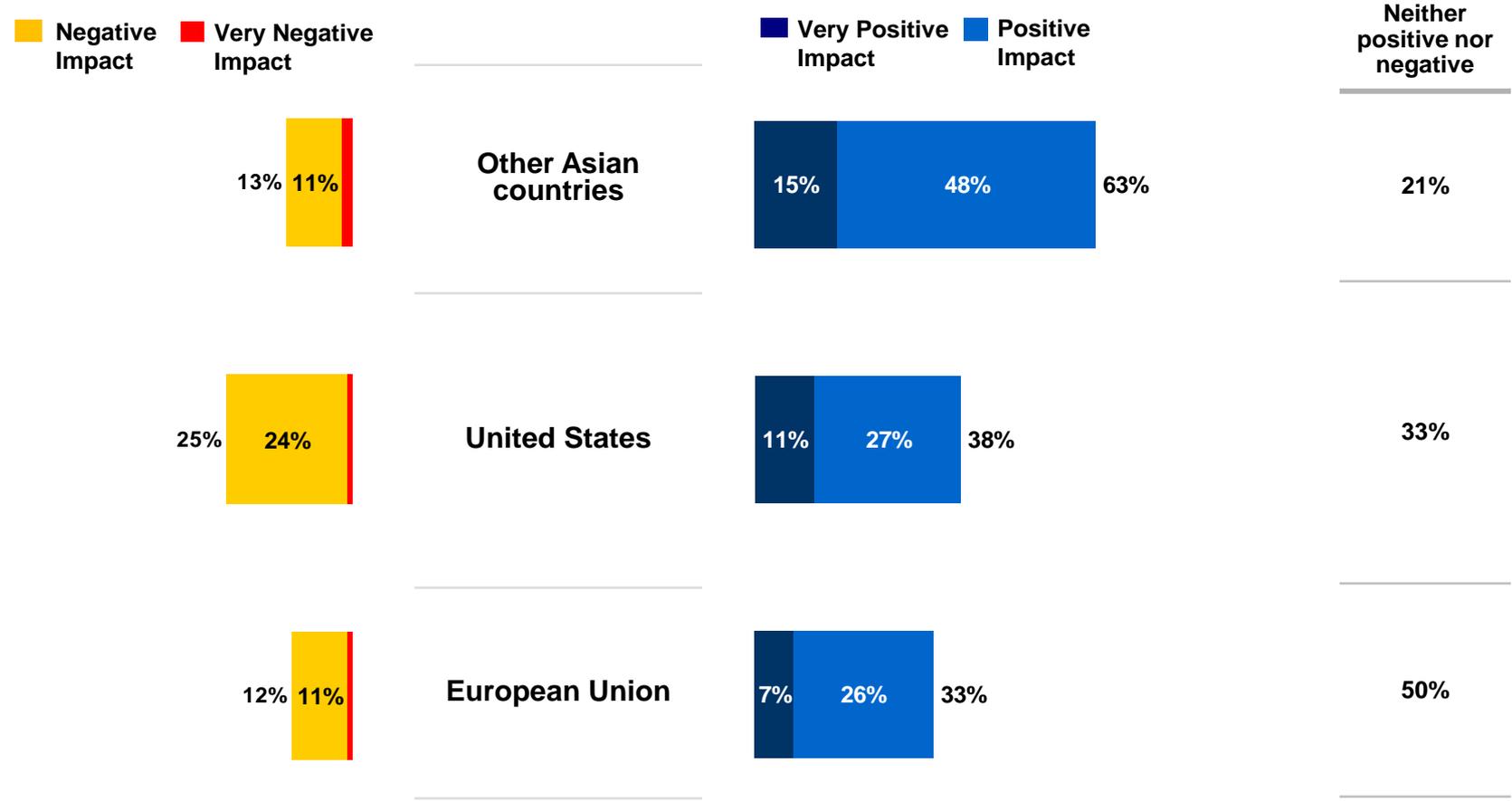


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Perceptions of Impact of Canada-China FTA

Perceptions of Impact of Canada-China FTA on Canada's Relations with Selected Countries

Most Canadians engaged in Asia fare certain that having a Free Trade Agreement with China would have a positive impact on Canada's relations with other Asian countries. They express more guarded views when it comes to relations with our traditional trading partners (U.S. and Europe) – somewhat more divided on the impact a Canada-China FTA would have on our relations with the United States (38% positive, 33% neutral, 25% negative), and generally neutral vis-à-vis Europe (50%).

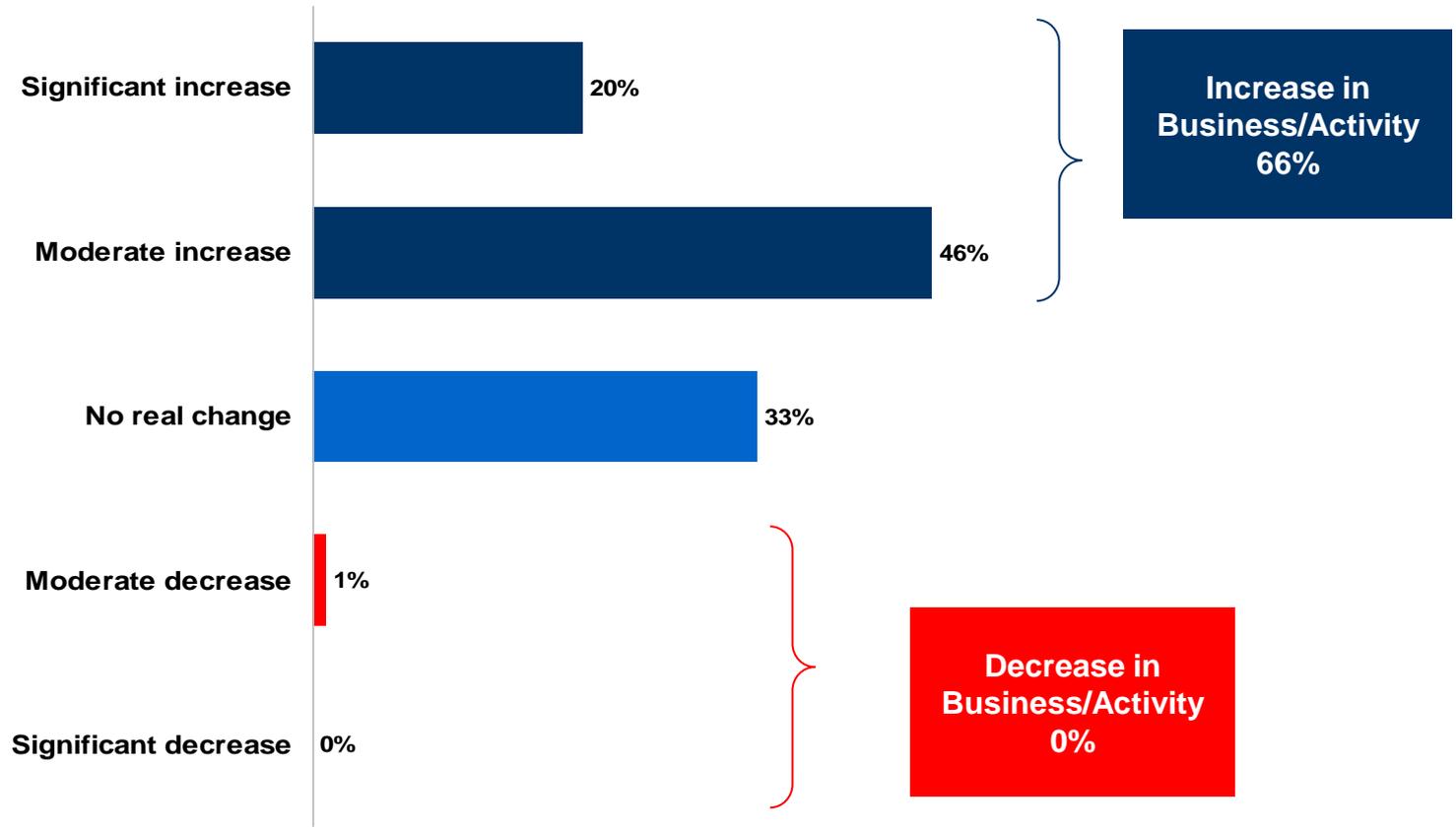


Base: (n=416)

Q.10 : Do you think having a free trade agreement with China will have an overall positive or negative impact on Canada's relations with each of the following?

Perceived Impact of Canada-China FTA on Level of Activity of Company/Organization in China

Canadians engaged in Asia definitely think they would see an increase in the level of business or activity their company/organization conducts in China were Canada to conclude negotiations for a free trade agreement with China over the next few years.



Base: (n=406)

Q.15: If Canada and China were able to conclude negotiations for a free trade agreement over the next few years, do you think this would lead to a general increase or decrease in the level of business or activity your company or organization conducts in China, or would there be no real change?

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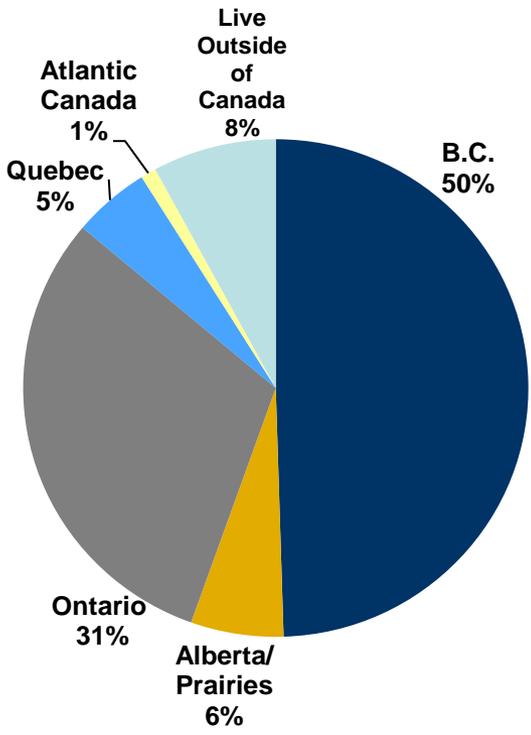
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Population Subgroup Differences

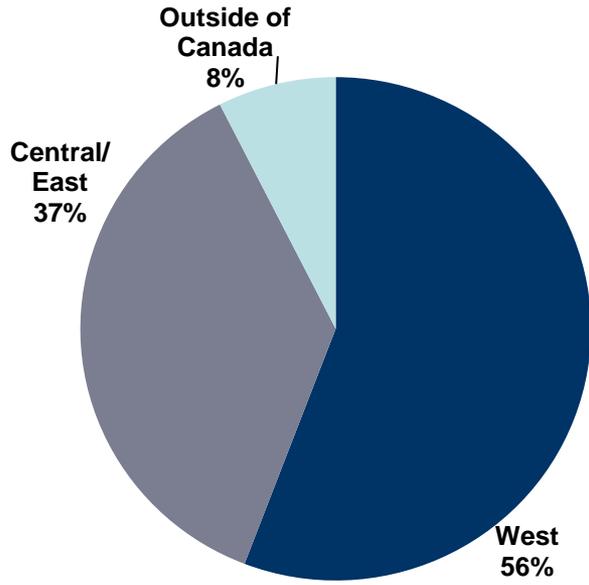
Distribution by Geography and Sector

Respondents to the survey live predominantly in Western Canada, notably British Columbia. However, 3-in-10 are Ontario residents. Most respondents work in the private sector, though a third are employed in the public sector, and a quarter work for an NGO or research institute.

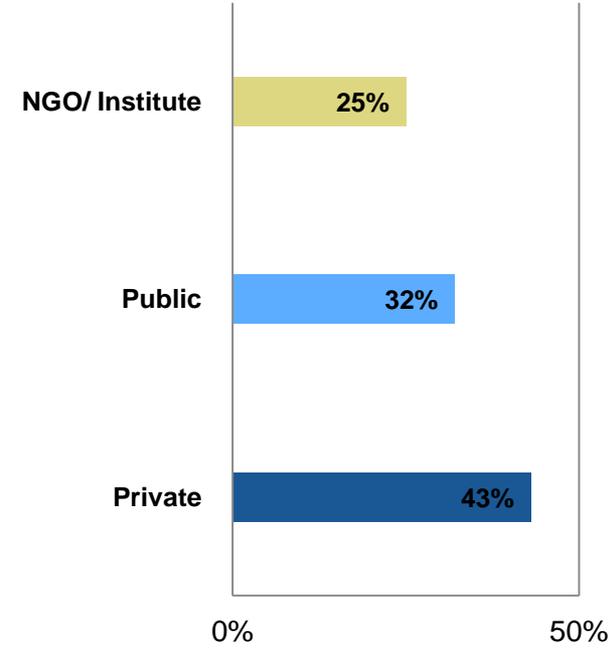
BY PROVINCE



BY REGION



BY SECTOR

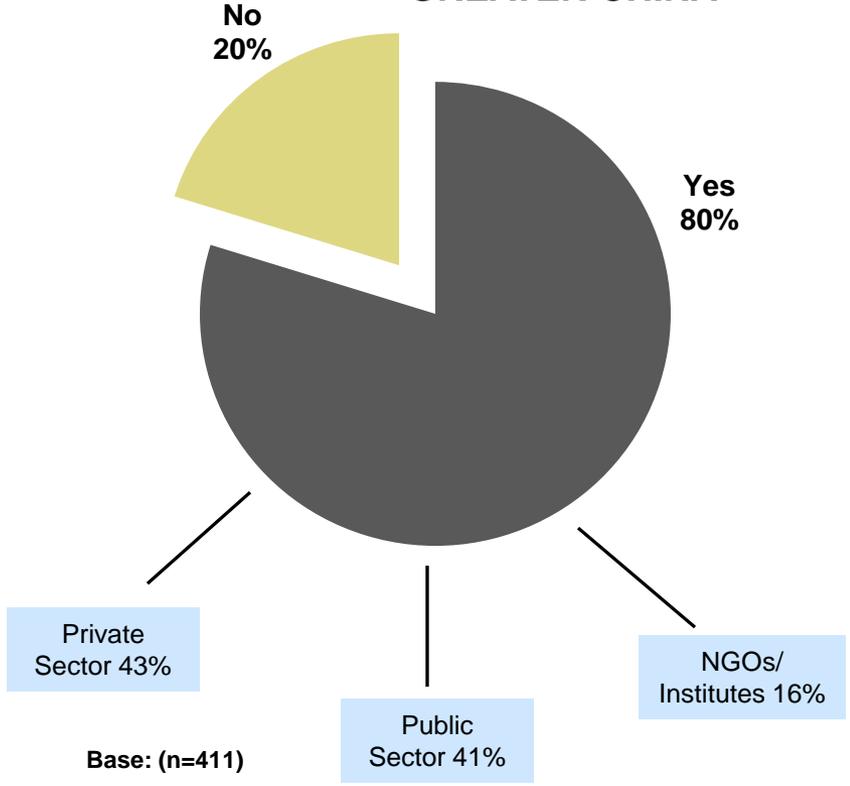


Base: (n=387)

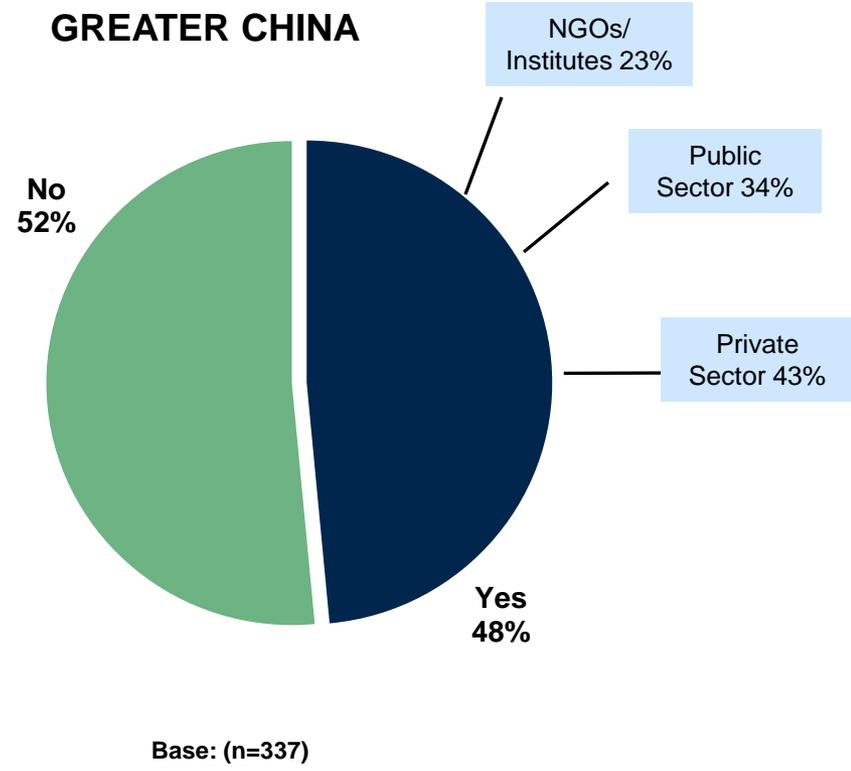
Business Activity & Professional Interests in Greater China

Those who have business activities or professional interests in China are as likely to work in the private as the public sector. However, most respondents with business operations in China are in the private sector. Though, again, a good number also work in public sector organizations or NGOs/Research institutes.

**BUSINESS ACTIVITIES/
PROFESSIONAL
INTERESTS IN
GREATER CHINA**



**BUSINESS
OPERATIONS IN
GREATER CHINA**





Differences by Population Subgroups

Asia practitioners, based on where they live and whether or not they have business activities and professional interests in Greater China, did differ somewhat in the attitudes they held towards a potential Canada-China FTA.

However, one thing all respondents have in common, regardless of where they live: close to half identify China as a priority country for Canada to negotiate an FTA (47% Western Canada, 47% Central/Eastern Canada, and 48% Live outside Canada).

- Differences by regions are more apparent according to the priority attributed to *other Asian nations*. Those outside of Canada rank an FTA with South Korea (21%) as a priority over Japan (10%), whereas the opposite is true for Central/Eastern/ and Western Canadian respondents who rank Japan as more important 13% and 19 % respectively, and 9% and 9% for South Korea respectively.
- India is also ranked as a much less important priority amongst those outside of Canada (7%) compared to 17% of Canadians in Central/Eastern Canada and 13% in Western Canada.
- Those residing in Western and Central/Eastern Canada are more likely than those outside of Canada to think Canada is moving too slowly to establish trade relations with China (55%, 57% vs. 50%, respectively). However, more of those outside Canada (27%) feel we're moving much too slowly (27% vs. 13% in Western Canada, and 17% in Central/Eastern Canada).

Asia practitioners with **business activities and professional interests** in Greater China are generally more favourable to a Canada-China FTA than those without:

- They are **more likely** to believe Canada is moving too slowly to establish economic/political relations with China (57%) than those without business and professional interests in Greater China (50%).
- They are **less likely** to worry about an FTA with China leading to Chinese government-controlled companies controlling a significant share of Canada's natural resource (54% disagree vs. 38% of those without activities in China).
- In order to make gains in negotiations for a Canada-China FTA, they are **more willing** than those without business activities to relax visa requirements to permit the free flow of skilled / professional workers (59% vs. 52%).



Differences by Subgroups (continued)

Questions	Geographic Regions			Business Activities/Professional Interests in Greater China	
	West	Central/East	Outside of Canada	Yes	No
Canadian Gov't should give top priority to which country in seeking to negotiate a free trade agreement					
China	47%	47%	48%	50%	33%
Japan	19%	13%	10%	16%	16%
India	13%	17%	7%	11%	30%
European Union	9%	14%	7%	10%	14%
South Korea	9%	9%	21%	12%	11%
Thailand	2%	0.7%	7%	2%	1%
Is Canada Moving too Quickly or Too Slow in trying to Establish Economic/Political Relations with China					
Much too Quickly	2%	1%	0%	1%	4%
Too Quickly	7%	2%	7%	4%	10%
About the Right Pace	36%	39%	40%	37%	36%
Too Slowly	42%	41%	23%	40%	40%
Much Too Slowly	13%	16%	27%	17%	10%

Panel Members with Business, Professional Interests in Greater China: Reasons For & Against

	Business Activities/ Professional Interests in Greater China	
	Yes	No
Canada is a trading nation; it just makes sense for us to build a special trading relationship with China, because it's the largest market in Asia.		
Strongly Agree	56%	42%
Moderately Agree	36%	43%
Neither Agree nor Disagree	5%	2%
Moderately Disagree	2%	7%
Strongly Disagree	2%	5%
Signing a free trade agreement with China is a bad idea, because it could lead to government-controlled Chinese companies owning a significant share of Canada's natural resource development		
Strongly Agree	8%	15%
Moderate Agree	20%	18%
Neither Agree or Disagree	17%	28%
Moderately Disagree	32%	24%
Strongly Disagree	22%	14%
Willing to relax visa requirements to permit free flow of skilled / professional workers in order to make gains in negotiations for Canada-China FTA		
Strongly Support	29%	16%
Moderately Support	40%	36%
Neither Support or Oppose	13%	14%
Moderately Oppose	11%	14%
Strongly Oppose	7%	20%

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Research Methodology



Research Methodology

- ◆ Points of View Asia Pacific is an opinion panel of the Asia Pacific Foundation of Canada. It comprises 1,200 individuals who are engaged in Asia through their professional, research, or personal interests. 85% of panelists have business or professional interests in Asia, and 67% have worked in Asia. As members, these individuals have consented to receive invitations to participate in ongoing APFC surveys on issues related to Canada-Asia relations.
- ◆ Data collection occurred between June 19th and 27th, 2012. A total of 465 people completed the survey questionnaire in whole or in part - a 39% response rate. Invitations were sent to opinion panel members through a “closed link” using Insite Systems Inc.
- ◆ The final sample was not weighted in any fashion, given that there are no available aggregate statistics against which to compare our sample parameters.
- ◆ Statistical margins of error are not applicable to online surveys, but this poll of 465 Points of View Asia Pacific opinion panelists has a credibility interval of plus or minus 4.5 percentage points.