

2012
NATIONAL OPINION POLL:

CANADIAN VIEWS ON ASIA

Asia Pacific
Foundation
of Canada

Fondation
Asie Pacifique
du Canada



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ABOUT THE ASIA PACIFIC FOUNDATION OF CANADA

The Asia Pacific Foundation of Canada, created by an Act of Parliament in 1984, is an independent, not-for-profit think-tank on Canada's relations with Asia. The Foundation functions as a knowledge broker, bringing together people and knowledge to provide current and comprehensive research, analysis and information on Canada's

transpacific relations. It promotes dialogue on economic, security, political and social issues, fostering informed decision-making in the Canadian public, private and non-governmental sectors. The Foundation also provides grants to support policy research and informed discussion on Canada's relations with Asia.

ABOUT THE NATIONAL OPINION POLL: CANADIAN VIEWS ON ASIA

Since 2004, the Asia Pacific Foundation of Canada has conducted regular nation-wide surveys to assess the attitudes and perceptions of Canadians on Canada's policies on Asia and Canada-Asia relations. Unique in its construction and its objectives, the Foundation's National Opinion Poll has been instrumental in drawing a portrait of Canadians' perspectives of Asia and of the region's increasing relevance to Canada's prosperity. It serves as a valuable source of information about how Canadians feel about the rise of Asia and provides a basis for having a continued conversation about Canada's role in the Asia Pacific region.

In recent years, the National Opinion Poll has revealed a Canadian population cognizant of the rise of Asia, and of its growing influence on the global order. They also acknowledge the opportunities and challenges facing Canada as it seeks to position itself in the Asia Pacific region.

Yet, despite their openness to Asia, Canadians display a distinct reluctance to fully embrace Canada as an Asia Pacific nation. Why this is the case, and how it manifests itself in public opinion, are key elements of the poll's findings.

With the global context evolving at a rapid pace, information in this year's poll identifies key shifts in Canadian public opinion on Canada-Asia relations and on where Asia fits in Canadians' mindset. In addition, this year's poll asks questions related to three key policy areas which have been part of recent national discussions on Canada-Asia relations: energy exports to Asia, human rights, and free trade agreements. Taken together, the 2012 National Opinion Poll provides the most comprehensive picture to date of how Canadians think and feel about Asia, and it does so amid major national debates on Canada's future role in the Asia Pacific region.

METHODOLOGY

From February 21-29, 2012, Angus Reid Public Opinion conducted an online survey among 3,129 Canadian adults who are Angus Reid Forum panelists. The margin of error, which measures sampling variability, is +/- 1.8% for the entire sample. The results have been statistically

weighted according to the most current education, age, gender and region Census data to ensure a sample representative of the entire adult population of Canada. Discrepancies in or between totals are due to rounding. The median completion time for the survey was 14 minutes.

KEY FINDINGS OF 2012 NATIONAL OPINION POLL

1. CANADIANS ARE INCREASINGLY ATTUNED TO ASIA, BUT STILL HAVE CONCERNS

Canadians across the country are increasingly attuned to Asia and to Canada's place in the Asia Pacific region. Fully 4-in-10 Canadians state that they're paying more attention to Asia now than they have in the past 12 months; and there has been a 3-point uptick from 26% to 29% in the number of Canadians who see Canada as part of the Asia Pacific region. The proportion of Canadians who attribute "warm" feelings to Asian countries has also gone up, specifically for China (12%), Japan (34%), South Korea (17%) and Southeast Asia (14%). And several Asian countries—China and India, in particular—are perceived in positive terms such as "growing", and "strong".

While this shift in their mental maps of Asia has occurred, Canadians are not yet fully embracing Asia. Despite positive shifts in favourability towards Asia, feelings about countries in the region remain well below that of other Western democracies; Australia (68%) and Japan (34%) are notable exceptions. And, apart from China, other Asian countries occupy a much lower position in Canadians' minds when it comes to whether or not they have an impact on Canada's prosperity. Further, Canadians perceive some Asian countries—China, in particular—in negative terms, such as "corrupt", "authoritarian", and "threatening".

Canadians also continue to display a lingering hesitation and concern about Asia, particularly China. While appreciating the benefits of foreign investment from Asian countries, for example, fewer than one-in-five Canadians would be in favour of state-controlled companies from China and India buying a controlling stake in a major Canadian company. And there has been a notable 6-point increase in proportion of Canadians concerned about China's growing military power in the Asia Pacific region.

2. ECONOMIC FOCUS CONTINUES TO DRIVE CANADIANS' ATTRACTION TO ASIA

Economic opportunities continue to drive Canadians' growing interest in Asia. A solid majority views Asian economies as vital to the well-being of Canada, and most feel we would benefit from more Asian investment, a consistent trend over the past few years. China, in particular, is increasingly considered important to Canada's prosperity, up 2-points since 2011, second only to the United States, and well ahead of other Asian countries. Fully half of the Canadian population now sees the growing economic power of China as more of an opportunity than a threat, up a substantial 7-points in the past 12 months. India, too, is on Canadians' radar; 57% perceive economic opportunities with this Asian country as well, up 5 points over the past year. And, more than two-thirds across the country think Canada should facilitate trade and investment missions for Canadian companies to visit Asia, and for Asian companies to visit Canada.

In contrast, Canadians' commitment to building the 'soft' relationships with Asian countries in the social, educational, and cultural sectors, while solid, has waned over the past 12 months. Support for student exchanges and university agreements, for example, is down 4 points to 60%; for cultural exchanges through the performing arts, down 5 points to 56%. Moreover, less than half the Canadian population think it's important to place more emphasis on teaching about Asia in their province's education system (42%), and just one quarter feel the same way about teaching Asian languages in the schools.

3. CANADIANS ARE OPEN TO SHIFTING AWAY FROM THE U.S. AND MORE TOWARDS ASIA, BUT THEY WANT TO MAINTAIN TRADITIONAL TIES

With the rise of Asia, Canadians continue to see advantages in diversifying our global economic and political relationships, and are prepared to see the lens turned more directly across the Pacific. In particular, a majority agree that strengthening

economic and political relationships with Asia should be Canada's top foreign policy priority. This coincides with the preponderant view among more than eight in ten Canadians that the Government of Canada should aim to diversify its trade to be less dependent on the United States.

Still, Canadians demonstrate some risk aversion, wanting the best of both worlds—diversification and maintenance of traditional ties. Fully eight-in-ten think Canada should develop good economic relations with Asia, but not move away from our historic economic partnerships with the U.S. and Europe.

For many Canadians, current shifts in the global political and economic order may well be driving Asia's appeal. Two-thirds believe that China's influence in the world will surpass that of the U.S. in 10 years; one-third feels the same about India. And, while "warm" feelings towards the U.S. have jumped 4-points since 2011, it is apparent the United States' image among many Canadians is less encouraging; more than a third describe the U.S. as "in decline," twice the proportion that is attributed that to the UK and France—and dramatically higher than the 3 percent of Canadians who chose the same term to describe China. Further, the United States captures the number one spot for being "disliked" by Canadians; a third feels this way, compared to a fifth for China. A quarter of Canadians label the United States as "corrupt," placing third among nine countries and tied with Southeast Asia; one-fifth see the U.S. as "threatening," second only to China.

4 REGIONAL DIFFERENCES IN CANADA-ASIA RELATIONS

There are significant variations across Canadian provinces and territories when it comes to views of Asia. In particular, there are noticeable differences in attitudes with Canadians from British Columbia, Alberta, Quebec and the Northern Territories. Their higher favourability towards Asian countries, suggest that proximity to the Pacific may be a less powerful force than originally

believed in terms of shaping Canadians' link to Asia. Past survey results showed a higher ratio of British Columbians ranking Asian countries favourably. Given the province's geography, the 2012 results are consistent. Indeed, variables aside from geographic proximity to the Pacific may be impacting how Canadians perceive Canada's relations with the Asia Pacific region.

Respondents from BC, Alberta, Quebec and the Northern Territories tend to give Asian countries a higher average ranking of favourability; this is notably true for China, India, Southeast Asia, Japan and South Korea. A higher ratio of respondents from these regions also rank China as important for Canada's prosperity. The proportion of respondents in Alberta and Quebec who ranked China favourably is higher than that of the rest of Canada. Albertans and Quebecers also feel more warmly toward China, Southeast Asia and South Korea compared to findings from previous years.

This is in contrast to the respondents from Ontario, who tend to rank Asian countries less favourably overall. The proportion of Ontarians who rank China and Southeast Asia with a lower score is higher than those living elsewhere in Canada. Ontarians are also the least likely to consider Canada to be part of the Asia Pacific region (21%).

5. CANADIANS SEE THE NEED TO BUILD A CANADA-ASIA ENERGY RELATIONSHIP, BUT ARE QUITE MIXED IN THEIR VIEWS ON THE DIRECTION IT COULD TAKE

Consistent with their desire to diversify Canada's economic relationships globally, most Canadians see definite advantages in deepening our relationships with Asian countries in the energy sector. Indeed, a solid majority feels a sense of urgency to act now to take advantage of the region's need for energy resources. And many Canadians even seem prepared to see Canada move quickly into Asia on energy matters despite the important ties we have with the United States on energy. However, a majority remains unconvinced that the economic benefits of Asia's

investment in Canada's energy sector outweigh concerns about foreign ownership of our natural resources.

Further, Canadians' opinions on some key aspects of any potential energy relationship with Asia are decidedly mixed. Just under half believe the potential environmental risk of transporting oil and gas to Asia outweighs the potential economic benefits; four-in-ten share the opposite view. While a slim majority (53%) would support the building of pipelines to transport crude oil to ports on Canada's west coast for export to Asia, public opinion is evenly split on allowing tankers carrying crude oil to enter the waters off Canada's west coast (45%). And, a solid majority supports the idea that the development of energy projects should have the support of affected First Nations communities.

This mixed public opinion landscape on energy is rendered more complex by regional differences, with Albertans being much more supportive of pursuing the Asian relationship, and those in British Columbia holding some of the strongest opposition, particularly on pipelines and tanker traffic.

6. FEWER CANADIANS SEE HUMAN RIGHTS AND DEMOCRACY PROMOTION AS A MAJOR PRIORITY IN CANADA'S FOREIGN POLICY WITH ASIA

Canadians' support for the promotion of human rights and democracy in Asia seems to be taking a back seat to the potential for economic gain. For two-thirds of Canadians, it is possible for the Government of Canada to promote business in China and at the same time raise human rights concerns. While about half of Canadians still want the Canadian Government to focus on these issues in their relations with Asian countries, far fewer compared to a year ago think human rights (down 10 points to 45%) and democracy promotion (down 8 points to 49%) should be at the top of the Government's priority agenda for Asia. Indeed, a solid six-in-ten Canadians believe we should take action on our own human rights situation before we preach to Asia. This dampening of views on human rights in Asia is surprising, because it

comes at a time when Canadians are less convinced that the human rights situation in China, notably, is improving (down 2 points to 42% since 2011, and 5 points since 2010).

7. CANADIANS' SUPPORT FREE TRADE AGREEMENTS OVERALL, BUT ARE MIXED WHEN IT COMES TO ASIA

Canadians are generally quite supportive of entering into Free Trade Agreements (FTAs) with countries from around the globe. This is particularly true as far as the European Union and Japan are concerned, where support levels are over sixty percent. However, with other Asian countries—China, India, South Korea, and ASEAN countries—the picture is much more mixed. While more than four in ten would support FTAs with these countries, more than a third oppose the idea.

Most Canadians have either not heard of the Trans-Pacific Partnership (TPP) or don't know enough about it to have an opinion. Still, fully four in ten support Canada joining the proposed regional free trade agreement. This is another indication of Canadians' openness to establishing closer economic relationships with countries in the region.



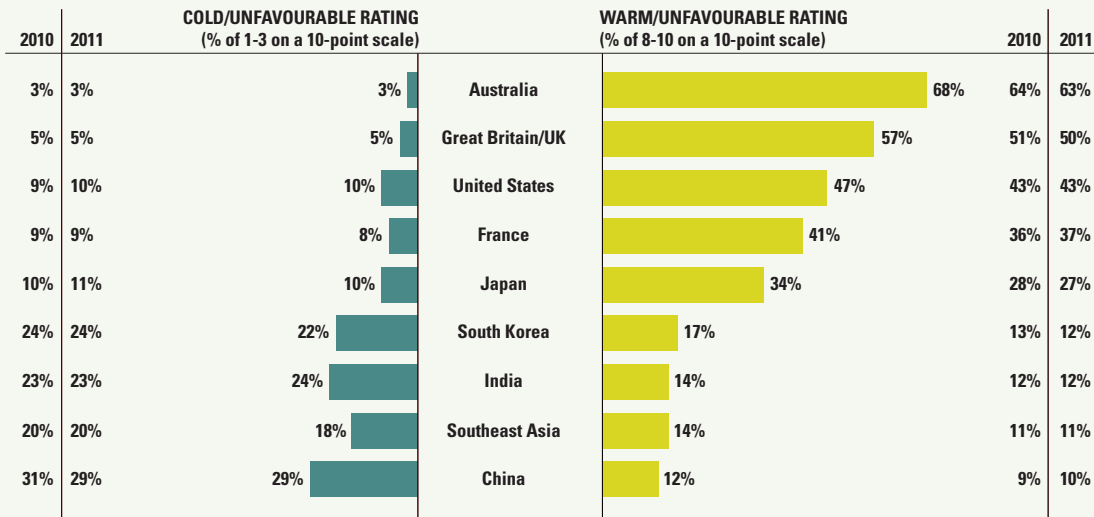
SECTION 1:

PERCEPTIONS OF ASIA

KEY FINDINGS

- Canadians generally attribute favourable or “warm” feelings to Western countries and unfavourable “cool” feelings to Asian countries, with the exception of Japan.
- There are regional differences across Canada. This year, Canadians from BC, Alberta, Quebec and the Northern Territories gave Asian countries a higher average ranking of favourability than those in other provinces, specifically China, India, and Southeast Asia. Compared to the last two years, respondents from Alberta gave a higher mean score this year for China, Japan, Southeast Asia and South Korea.
- In contrast, Ontario residents ranked Asian countries less favourably. The proportion of respondents in Ontario who ranked China, India and Southeast Asia with a lower score was higher than the rest of Canadian provinces and territories.
- The number of Canadians who identify Canada as part of the Asia Pacific region has increased from 26% last year to 29%, a statistically significant increase. A majority of respondents from the North and BC share this view.
- However, when Canadians were asked to identify Canada in a comparative context with the Americas, the North Atlantic, or the Asia Pacific, a majority (69%) associated Canada with the Americas, and a minority (13%) selected the Asia Pacific region. Still, a third of British Columbians identified Canada with the Asia Pacific.
- Asia is on the minds of Canadians as many (39%) have thought more about Asia this year than in the past. Northerners and western Canadians are more likely to have thought more about Asia this year than Canadians from the Prairies and eastern provinces.

Canadians Express Cool Feelings towards Asia



Base: All respondents (n=2903 in 2010, 2926 in 2011, 3129 in 2012)

Q.1: Please rate your feelings towards some countries or regions, with ten meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and five meaning not particularly warm or cold. You can use any number from zero to ten: the higher the number the more favourable your feelings are toward that country.

This year, favourability ratings increased significantly for all Asia Pacific countries. As with the past two years' surveys, Canadians continue to attribute positive feelings to western nations. With the exception of Australia and Japan, Canadians attribute negative or "cool" feelings to Asian countries. Australia is again ranked highest in favourability. India, China and Southeast Asia experienced increases, though they are not statistically significant.

Warm Feelings of Countries and Regions by Provincial Breakdown

WARM / FAVOURABLE RATING (% of 8-10 on a scale of 10)							
	NORTH	BC	ALBERTA	MB/SK	ONTARIO	QUEBEC	ATLANTIC
Australia	70%	71%	70%	71%	72%	59%	66%
United Kingdom	52%	59%	54%	56%	63%	47%	57%
United States	41%	46%	42%	49%	49%	48%	49%
Japan	40%	43%	37%	31%	32%	35%	30%
France	32%	33%	34%	28%	39%	59%	34%
Southeast Asia	23%	19%	18%	11%	12%	16%	10%
South Korea	21%	18%	20%	13%	15%	16%	17%
India	20%	14%	18%	10%	11%	17%	11%
China	16%	10%	13%	11%	9%	16%	11%

○ Denotes statistically significant differences among provinces
 Base: All respondents (n=3129)
 Q.1: Please rate your feelings towards some countries or regions, with ten meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and five meaning not particularly warm or cold. You can use any number from zero to ten: the higher the number the more favourable your feelings are toward that country.

This year, we added the point of view of Northern Canadians. Respondents from the North, Alberta and Quebec express warmer feelings towards China, Southeast Asia and India compared to those from the Prairies, Ontario and the Atlantic. A higher proportion of Ontarians rank the United Kingdom positively, compared to the rest of Canadians.

Cool Feelings of Countries and Regions by Provincial Breakdown

COLD / UNFAVOURABLE RATING (% of 1-3 on a scale of 10)							
	NORTH	BC	ALBERTA	MB/SK	ONTARIO	QUEBEC	ATLANTIC
China	23%	31%	25%	28%	34%	24%	26%
South Korea	16%	18%	19%	25%	24%	23%	21%
France	15%	7%	9%	10%	8%	6%	8%
India	10%	22%	24%	25%	28%	19%	18%
Southeast Asia	10%	14%	15%	18%	23%	14%	16%
United States	9%	13%	9%	9%	10%	10%	9%
United Kingdom	4%	3%	6%	4%	4%	6%	4%
Japan	3%	6%	7%	10%	12%	10%	9%
Australia	2%	3%	3%	3%	3%	2%	4%

○ Denotes statistically significant differences among provinces
 Base: All respondents (n=2926)
 Q.1: Please rate your feelings towards some countries or regions, with ten meaning a very warm, favourable feeling, zero meaning a very cold, unfavourable feeling, and five meaning not particularly warm or cold. You can use any number from zero to ten: the higher the number the more favourable your feelings are toward that country.

Ontarians have significantly cooler feelings toward Southeast Asia, China and India than most other provinces.

Perceived Qualities of Countries/Regions

	GOVERNANCE					SHIFTS IN INTERNATIONAL ORDER					FEELINGS AND ATTITUDES TOWARDS COUNTRIES AND REGIONS					
	Free	Authoritarian	Progressive	Corrupt	Conservative	Strong	Weak	Growing	In decline	Friendly	Threatening	Exciting	Boring	Honest	Admired	Disliked
Australia	41%	1%	25%	1%	12%	24%	2%	22%	1%	58%	0%	40%	2%	28%	34%	1%
UK	33%	8%	14%	4%	30%	23%	5%	8%	18%	37%	2%	16%	12%	19%	25%	3%
USA	35%	19%	14%	24%	22%	35%	5%	11%	37%	25%	20%	16%	4%	7%	18%	31%
France	29%	5%	15%	9%	12%	14%	11%	6%	17%	26%	1%	26%	8%	10%	19%	11%
Japan	16%	12%	25%	6%	19%	28%	3%	23%	12%	24%	6%	20%	3%	16%	23%	3%
Southeast Asia	2%	14%	6%	23%	9%	4%	11%	26%	5%	10%	11%	12%	5%	2%	3%	9%
South Korea	10%	16%	13%	17%	12%	10%	8%	24%	5%	14%	15%	7%	5%	6%	5%	11%
India	6%	9%	10%	30%	11%	8%	10%	42%	6%	12%	11%	12%	5%	4%	4%	13%
China	1%	45%	12%	37%	15%	30%	2%	42%	3%	4%	34%	10%	3%	2%	5%	22%

Base: All respondents (n=3129)

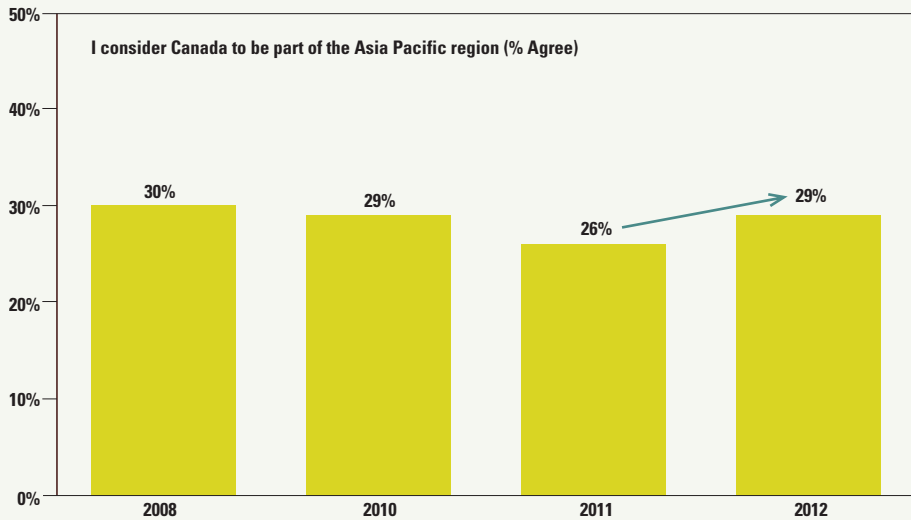
Q.1a (BAWI): Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute)

Positive Quality Negative Quality

Canadians perceive Australia most favourably across various terms related to Governance, and Feelings towards countries (41% free, 58% friendly, 40% excited, 34% admired, 28% honest). China sits atop the list of countries when it comes to qualities related to Shifts in the International Order (42% growing —tied with India, 30% strong), but it carries significant negatives for Governance (45% authoritarian, 34% threatening, 37% corrupt). Canadians

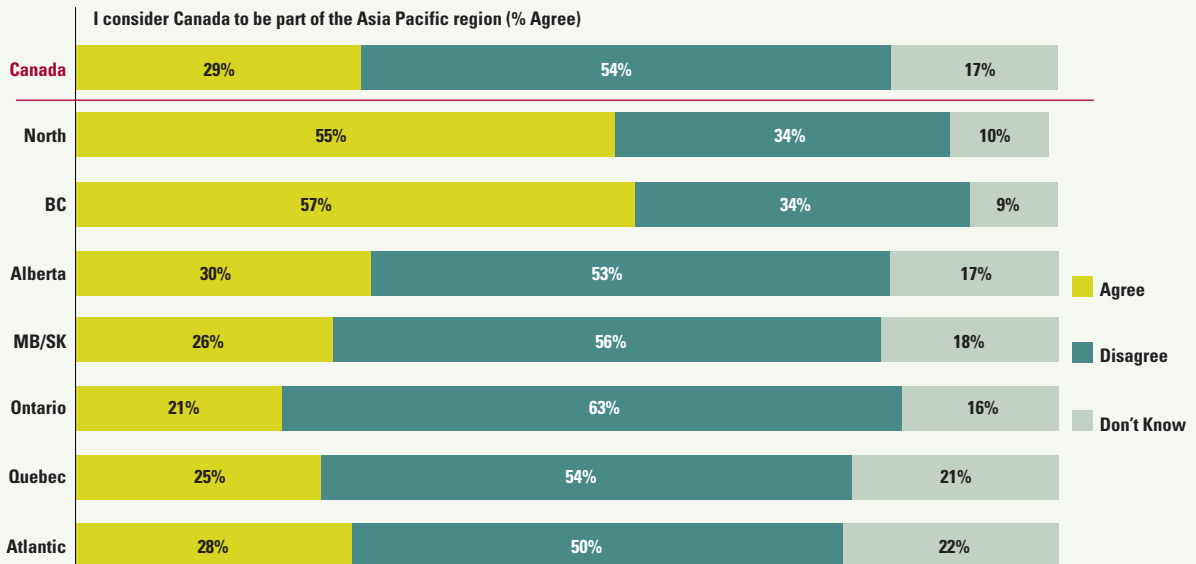
are mixed in their views of the United States as far as Shifts in International Order are concerned; 35% consider it “strong,” ahead of China and Japan, but 37% describe it as “in decline,” well above all other countries. Moreover, 31% describe the U.S. as “disliked,” the highest of any country, and a quarter see it as “corrupt.”

Canada as Part of the Asia Pacific Region



Q.3: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

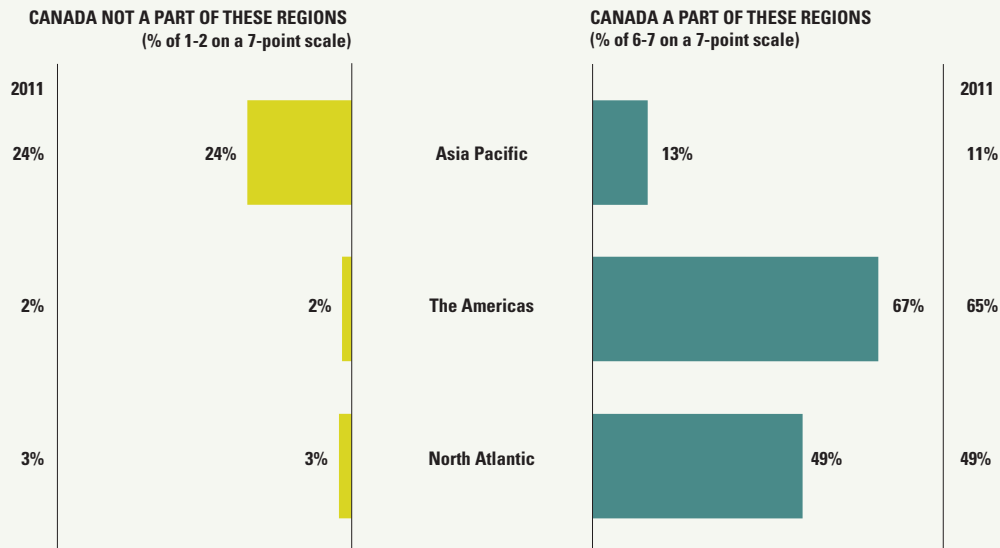
In 2012, there is a statistically significant increase in the number of Canadians who consider Canada to be part of the Asia Pacific region (29%), rising slightly back to the 2008 level.



Base: All respondents (n=3129)
Q.3: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

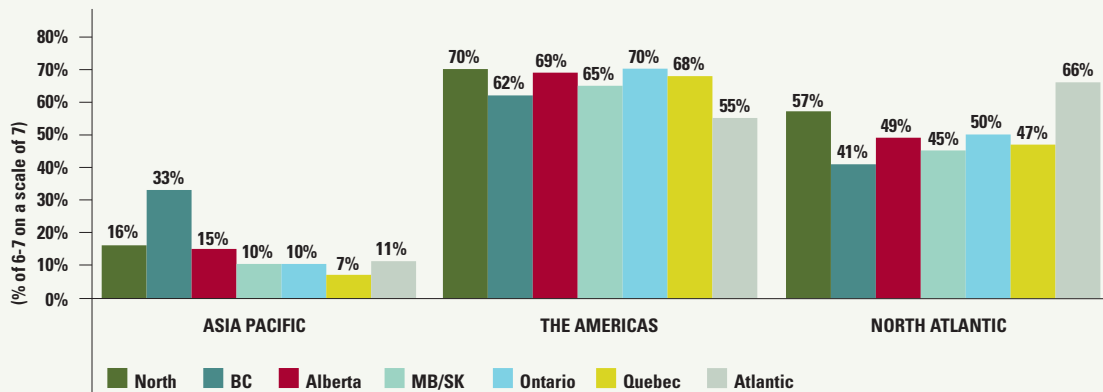
A majority of Canadians from British Columbia and the North consider Canada to be part of the Asia Pacific Region in contrast to the rest of Canada. Those who have business ties in Asia, have family in Asia and who studied in Asia are more likely to identify Canada with the Asia Pacific Region (49%, 42%, 48% respectively). Moreover, Canadians who are 55 years of age or older are also more inclined to identify with the Asia Pacific Region than other age groups.

Canadians Consider Canada as Part of the Americas



Base: All respondents (n=3129)
Q.3a: Thinking about Canada's place in the world beyond North America, to what degree do you think Canada is part of each of the following regions?

Over two-thirds of Canadians give a rating of 6 or 7 out of 7 when identifying Canada as part of the Americas, which is comparable to the findings in 2011. A minority of Canadians, similar to last year, view Canada to be part of the Asia Pacific region (13%).

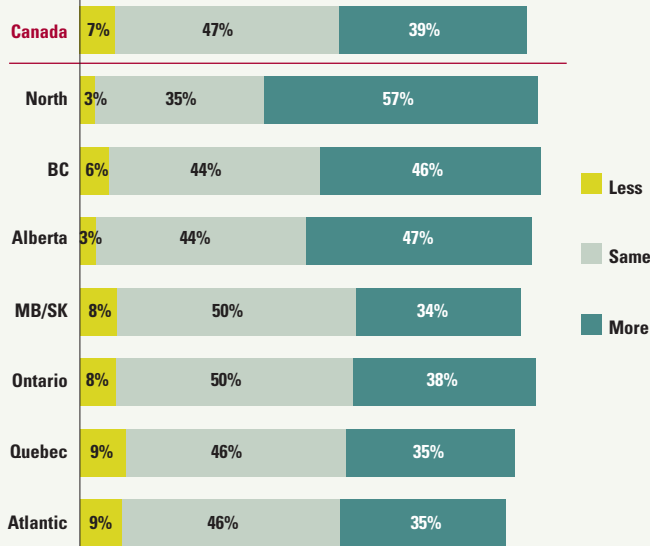


Base: All respondents (n=3129)
Q.3a: Thinking about Canada's place in the world beyond North America, to what degree do you think Canada is part of each of the following regions?

Comparable to last year's findings, about a third of Canadians from British Columbia identify Canada as part of the Asia Pacific region. They are more than twice as likely to consider Canada as part of the region than respondents in other provinces. Also, despite the fact that Albertans give Asian countries a higher average ranking of favourability, a solid majority (69%) consider Canada to be part of the Americas. Respondents from Atlantic Canada are significantly more likely to consider Canada as very much a part of the North Atlantic region.

Asia is on the Minds of Canadians

Paid more or less attention to Canada's relations with Asia this year versus in the past

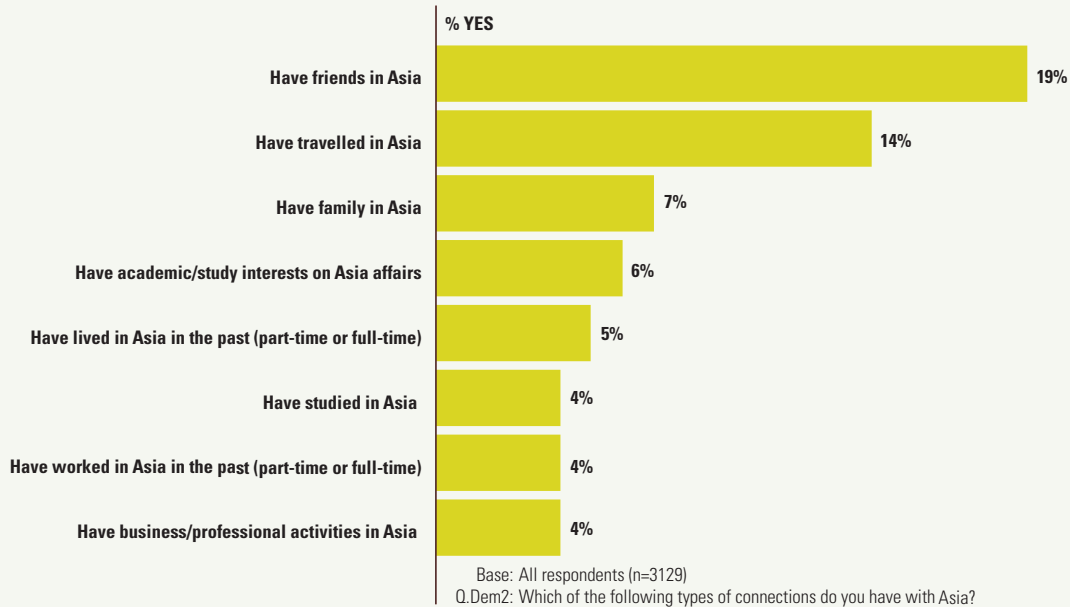


Base: All respondents (n=3129)

Q.10: 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?

Two-in-five Canadians (39%) say they are paying more attention to Canada's relations with Asia than in the past. This is truer of Canadians from the North, BC and Alberta, where a higher ratio of respondents is thinking about Canada's relations with Asia than those in the Prairies and eastern provinces. A slight majority of Canadians above 55 years of age, and Canadians whose annual earnings are above \$100,000, say they are paying more attention to Canada-Asia relations now than in the past. This is also true for Canadians who have business interests in Asia, who have family members in Asia, and who studied in Asia.

Canadians' Connections to Asia



Canadians' strongest connection to Asia remains through friends. Canadians report having travelled in the region at similar levels as last year (14%). Younger Canadians are significantly more likely to have family and friends in Asia than are older Canadians.

Connections to Asia by Province

	REGION						
	NORTH	BC	AB	MB/SK	ON	PQ	ATL
Have family in Asia	6%	11%	7%	5%	9%	4%	2%
Have friends in Asia	39%	31%	26%	15%	21%	9%	14%
Have business/professional activities in Asia	4%	4%	5%	3%	4%	3%	1%
Have travelled in Asia	26%	25%	17%	11%	16%	7%	5%
Have academic/study interests on Asia affairs	11%	8%	5%	5%	7%	3%	4%
Have worked in Asia in the past (part-time or full-time)	10%	4%	5%	1%	4%	3%	0%
Have lived in Asia in the past (part-time or full-time)	10%	6%	5%	1%	7%	2%	1%
Have studied in Asia	4%	5%	5%	2%	6%	2%	1%

Base: All respondents (n=3129)
Q.Dem2: Which of the following types of connections do you have with Asia?

Western and Northern Canadians along with Ontarians are more likely to have ties with Asia than are those from the Prairies, Quebec and the Atlantic Provinces.



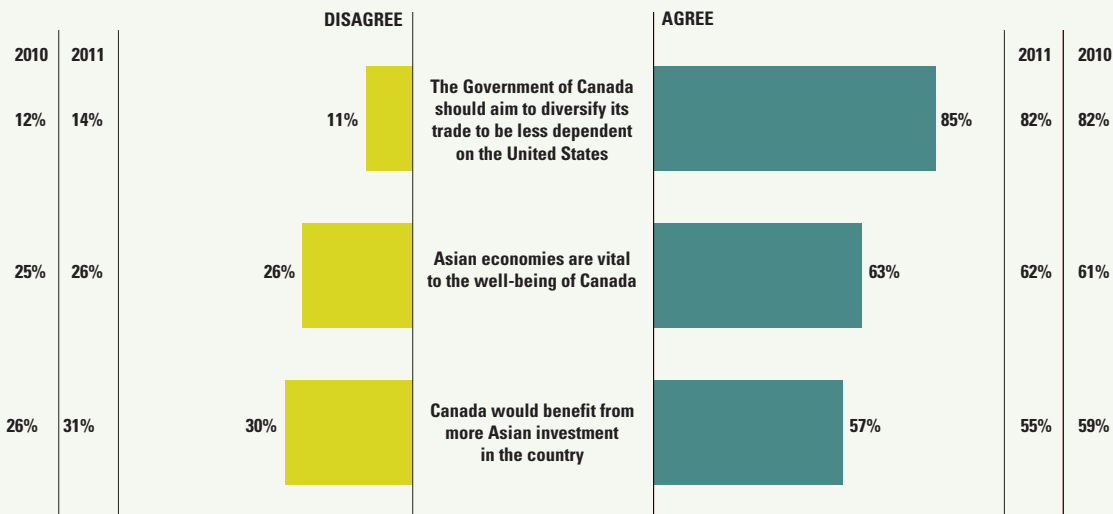
SECTION 2:

VIEWS OF CANADA-ASIA ECONOMIC RELATIONS

KEY FINDINGS

- **Canada- Asian relations are a recognized priority:**
 - A majority of Canadians agree that developing economic and political relations with Asian countries should be a top foreign policy priority for Canada (55%). This is especially important for Albertans. Most Canadians (63%) also believe Asian economies are vital to the well-being of Canada. Yet, Canadians do not want to pursue relations with Asia at the expense of traditional trading partners; the vast majority agrees with a focus on developing relations with Asia but without neglecting historic ties to other nations (81%).
 - Support for stronger economic ties between Canada and Asia are strongest in Northern Canada, British Columbia and Alberta. Ontarians are more skeptical with regards to the importance Asian economies play in Canada's economic well being.
- **The U.S. still tops country rankings in terms of economic importance:**
 - Canadians rank the U.S. as Canada's most important trading partner; China remains a distant second. However, even though the U.S. is viewed as our most important partner, its importance score experienced a significant decrease this year compared to two years ago. Japan is the top ranked Asian country. The Eastern regions of Canada (Ontario, Quebec and the Atlantic provinces) are more likely than other regions to attribute low importance to Asian nations.
- **Foreign ownership of Canadian resources by state-controlled companies is not welcomed:**
 - With the exception of the U.K., a solid majority of Canadians would oppose deals in which foreign governments attempt to buy a controlling stake in a Canadian company. This is especially true for ownership from India, China and the United Arab Emirates. Canadians' favourability to foreign ownership has declined for all nations over the past three years with the exception of the UK.
- **Trade agreements are supported at various levels:**
 - Most Canadians support the idea of Canada entering into a free trade agreement with the European Union, Japan and Brazil, but are divided on deals with most Asian countries. Ontarians are more likely to oppose a free trade agreement with Asian countries (with the exception of Japan). Albertans are more likely to support these deals.
 - A number of Canadians support Canada joining the Trans-Pacific Partnership (TPP) (40%), with the strongest support from Northerners (49%), Albertans (47%) and Quebecers (45%). Canadians from the Prairies and Atlantic provinces are more likely to have not heard of the TPP.

Canadians Support Diversifying Trade and Investment Partners



Base: All respondents n=3129 for 2012, n=2923 for 2011, n=2903 for 2010
 Q.3: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

An overwhelming 85% of Canadians are in favour of the Canadian Government diversifying its trade to be less dependent on the U.S., which increased significantly from the last two years. A majority of Canadians also agree that Asian economies are vital to the well-being of Canada and would benefit from more Asian investment. Canadians 55 years of age or older, and who earn \$100,000 or more per year, are also more likely to agree with these statements.

Provinces in the West Are More Eager to Diversify Trade and Investment Partners

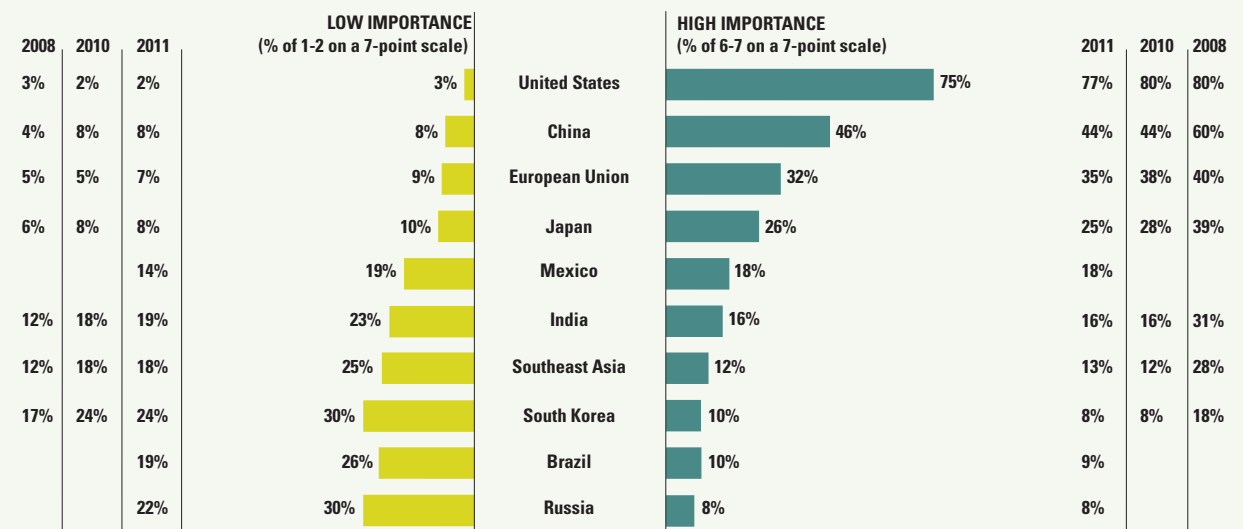
		NORTH	BC	AB	MB/SK	ON	PQ	ATL
The Government of Canada should aim to diversify its trade to be less dependent on the United States	% Agree	88	88	88	85	83	84	81
	% Disagree	10	10	8	11	13	10	13
Asian economies are vital to the well being of Canada	% Agree	82	76	74	63	60	55	56
	% Disagree	16	18	19	25	31	27	23
Canada would benefit from more Asian investment in the country	% Agree	71	63	64	54	53	56	53
	% Disagree	27	30	26	35	35	25	28

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces.
 Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)
 Q.3: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

There is wide support across all provinces and territories to diversify our trade to be less dependent on the U.S. However, a large majority of Canadians from the North, BC and Alberta agree that Asian economies are vital to the well-being of Canada and that the Canadian economy would benefit from more Asian investment. In contrast, Canadians from Saskatchewan/Manitoba, Ontario and Atlantic Canada are less likely to see that Asian economies are vital to the well being of Canada and that the Canadian economy would benefit from more Asian investment.

U.S. Still Ranks Highest in Importance for Canada's Economy, But Lower than in Past Years



Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)
 Q.2: How important are each of these countries or regions to Canada's prosperity?

The U.S. is rated the most important country to Canada's prosperity; three-quarters of respondents give the United States a score of 6 or 7 out of 7 in terms of importance. Yet this year, the country's rating is five points lower than two years ago. China continues to rank second to the U.S. In fact, all countries—except China and Japan—had a significant increase in low importance scores this year over the past year or two.

Canadians with annual earnings above \$100,000 are more likely to rank Asian countries higher in importance than Canadians in lower income brackets. This is also true for Canadians who have family in Asia or who have studied in Asia.

Northern, Western Canada Rank Asian Countries Higher in Importance for Canada's Economy

	HIGH IMPORTANCE (% of 6-7 on a scale of 7)						
	NORTH	BC	ALBERTA	MB/SK	ONTARIO	QUEBEC	ATLANTIC
United States	81%	77%	74%	76%	77%	70%	79%
China	58%	56%	51%	45%	42%	47%	39%
Japan	31%	32%	27%	25%	23%	26%	25%
European Union	29%	28%	30%	31%	32%	33%	31%
India	20%	22%	17%	17%	15%	13%	13%
Southeast Asia	20%	18%	15%	9%	10%	10%	9%
Brazil	16%	8%	9%	11%	11%	12%	7%
Mexico	16%	14%	18%	20%	17%	23%	12%
Russia	11%	10%	10%	11%	7%	8%	5%
South Korea	9%	13%	11%	10%	9%	9%	10%

○ Denotes statistically significant differences among provinces

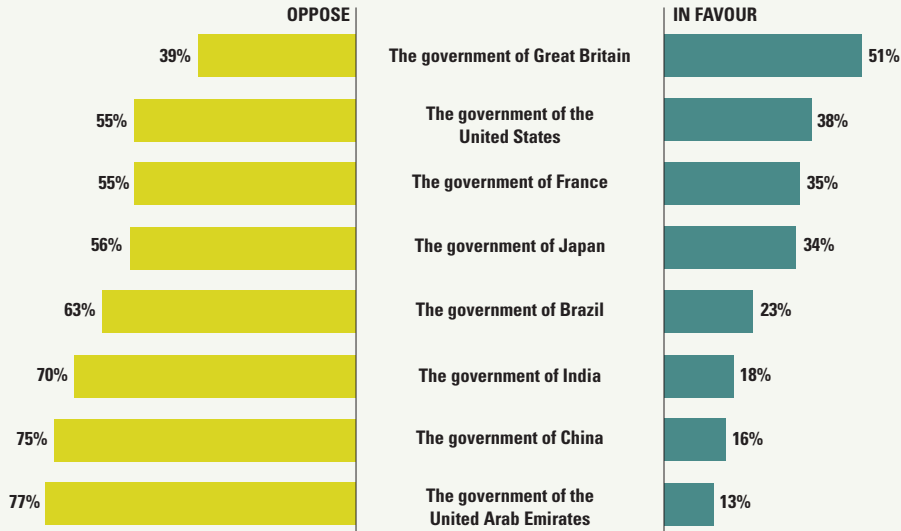
Base: All respondents (n=2926)

Q.2: How important are each of these countries or regions to Canada's prosperity?

Northerners, British Columbians and Albertans all place higher importance on China and Southeast Asia than do Canadians from other regions. In contrast, the Eastern regions of Canada (Ontario and the Atlantic Provinces) are

less likely to attribute importance to Asian nations. However, respondents from Quebec do place greater importance on China, India and Japan than in the past. The opposite is true for Ontarians, who attribute lower importance to Asian countries this year than in the past two years, specifically for India, Japan, South Korea and Southeast Asia.

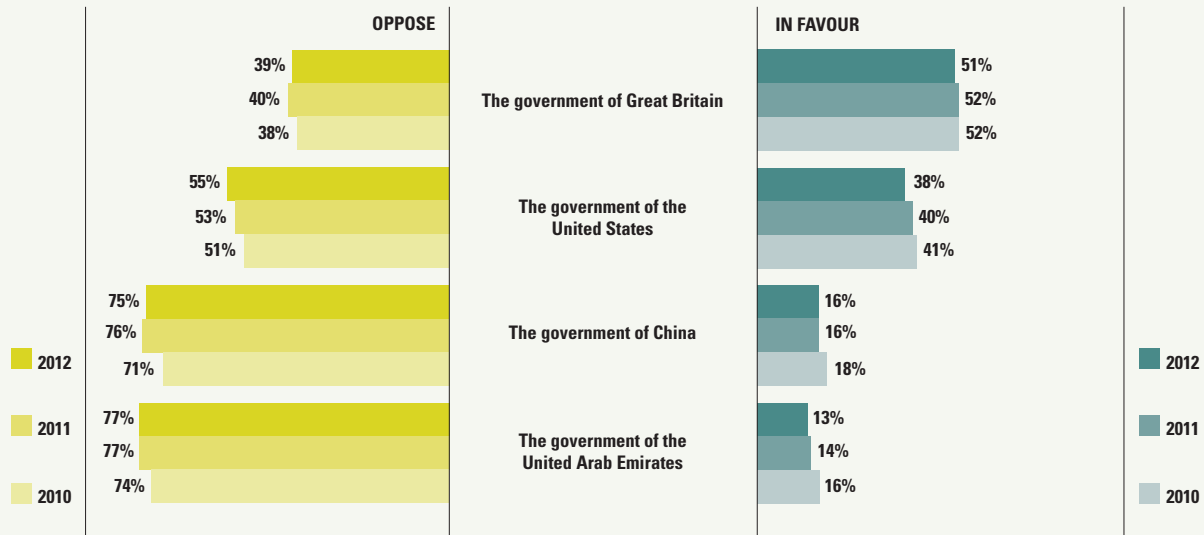
Canadians Are Wary of State-Controlled Foreign Enterprises



Base: All respondents: (n=3129)

Q.4: If a company, bank or investment fund controlled by a foreign government were trying to buy a controlling stake in a major Canadian company, how would you feel if the foreign government were: (in favour, opposed, don't know)

With the exception of the UK, a majority of Canadians would oppose deals in which state-controlled foreign companies attempt to buy a controlling stake in a Canadian company. This is especially true for ownership from India, China and the United Arab Emirates.



Base: All respondents: 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)

Q.4: If a company, bank or investment fund controlled by a foreign government were trying to buy a controlling stake in a major Canadian company, how would you feel if the foreign government were: (in favour, opposed, don't know)

Attitudes towards foreign ownership have been measured for certain countries over the past three years. Positive feelings towards foreign ownership by a state-controlled enterprise have declined for all nations with the exception of Great Britain, which remains relatively unchanged. This year, there is greater opposition to foreign ownership by state-controlled enterprises from the U.S., China and the UAE than two years ago.

Canadians Prefer a Balanced Approach in Developing Economic Relations with Asia



Base: All respondents (n=3129)
 Q.11: To what extent would you agree or disagree with each of the following statements about Canada's role in Asia?

A large majority (81%) agree that Canada should focus on developing economic relationships with Asia without neglecting historic ties to other nations. And a slight majority (55%) feels that strengthening economic and political relations with Asia should be Canada's top foreign policy priority.

Albertans Are Pivoting toward the Pacific

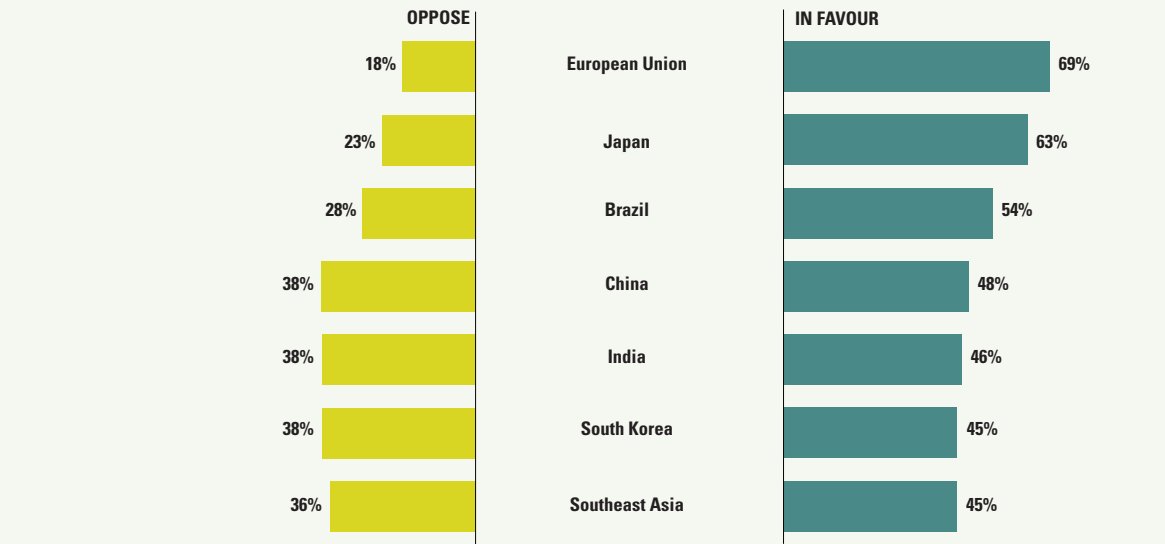
		NORTH	BC	AB	SK/MB	ON	PQ	ATL
Canada should focus on developing good economic relations with Asia, but it should not move away from its historic economic partnerships with the United States and Europe	% Agree	82	80	82	77	80	83	77
	% Disagree	16	15	13	16	13	7	11
Strengthening economic and political relations with Asia should be Canada's top foreign policy priority	% Agree	52	60	66	53	48	59	48
	% Disagree	44	32	27	36	40	27	30

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces. Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)
 Q.11: To what extent would you agree or disagree with each of the following statements about Canada's role in Asia?

Across Canada, respondents believe that pursuing closer economic relations with Asia should not override its historic relations with the United States and Europe. However, two-thirds of Albertans are in favour of making economic and political relations with Asia Canada's top foreign policy priority. In Eastern Canada, Quebecers are much more likely than Ontarians and Atlantic Canadians to support prioritizing Asia in Canadian foreign policy.

Canadians Are Split about Entering Free Trade Agreements with Asian Nations



Base: All respondents: (n=3129)

Q.15: Do you support or oppose Canada entering into a Free Trade Agreement with each of the following countries or regions (select support/oppose for each of the countries)

A majority of Canadians support entering into a Free Trade Agreement with the European Union, Japan and Brazil. However, Canadians are more divided about entering free trade agreements with most Asian countries.

Ontarians Are Least Favourable toward Free Trade Agreements with Asian Nations

		NORTH	BC	AB	MB/SK	ON	PQ	ATL
European Union	% In favour	59	69	71	66	70	71	57
	% Opposed	31	18	15	18	18	15	20
Japan	% In favour	63	68	69	63	62	63	54
	% Opposed	29	19	17	22	26	23	23
Brazil	% In favour	55	56	60	56	51	57	45
	% Opposed	32	26	23	24	32	25	25
China	% In favour	42	50	56	47	44	52	44
	% Opposed	48	37	31	37	44	34	33
India	% In favour	47	51	52	44	43	47	40
	% Opposed	43	36	31	37	43	36	33
South Korea	% In favour	51	52	55	47	41	43	41
	% Opposed	38	32	28	34	44	38	31
Southeast Asia	% In favour	48	49	54	46	40	47	38
	% Opposed	40	29	27	32	43	34	30

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces.

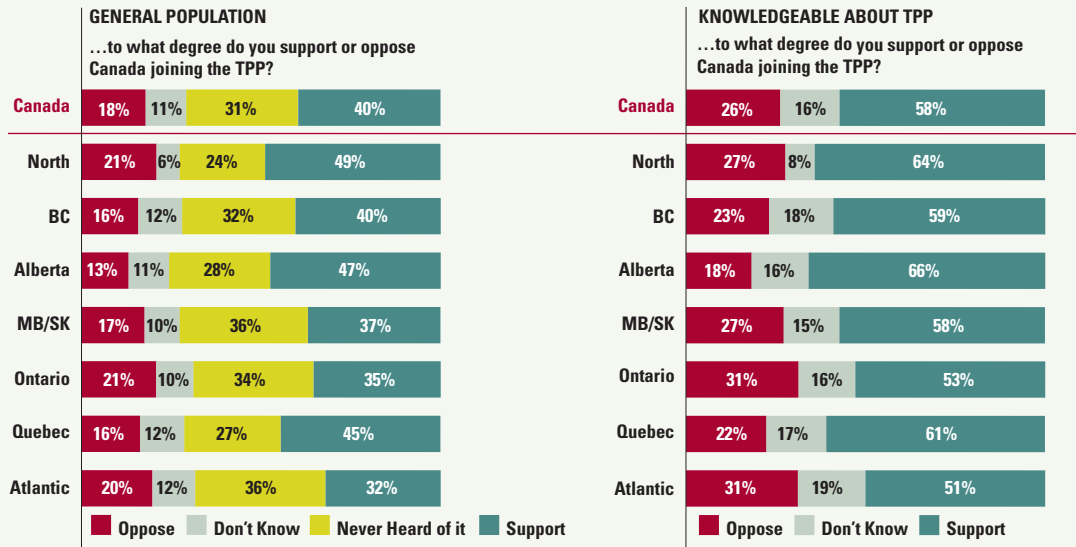
Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)

Q. 15: Do you support or oppose Canada entering into a Free Trade Agreement with each of the following countries or regions (select support/oppose for each of the countries)

Albertans are more likely to support free trade agreements with China (56%) and South Korea (55%) than those living in other Canadian regions. Ontarians are those most opposed to free trade agreements with Asian countries, specifically China (44%), India (43%) and South Korea (44%).

Canadians Support Canada Joining the Trans-Pacific Partnership



Base: Gen Pop (n= 3129) Heard of TPP (n=2174)

Q.16: Based on what you have read, seen, heard and know about the Trans-Pacific Partnership to what degree do you support or oppose Canada joining the TPP?

Nearly a third of Canadians (31%) have not heard of the Trans-Pacific Partnership (TPP). This lack of awareness is significantly higher in the Prairies, the Atlantic Provinces and Ontario. Of those who have heard of the TPP, more than half support it (58%), with the strongest support coming from Albertans (66%), Northerners (64%) and Quebecers (61%). Canadians with business ties in Asia (58%), who have family in Asia (47%) or who have studied in Asia (51%), and those whose annual earnings are above \$100,000 are also more likely to support the TPP.



SECTION 3:

PROVINCIAL PERSPECTIVES ON CANADA-ASIA RELATIONS

KEY FINDINGS

- In general, Canadians believe that strengthening Canada's economic ties with Asia is more important than the cultural, social and educational aspects of our relations.
- Over two-thirds of Canadians in the various provinces place value on their provincial governments facilitating trade missions either to or from Asia. But Canadians are divided in their support of their premiers visiting Asian capitals.
- The importance of building cultural ties through cultural and educational exchanges with Asia has decreased over the past year, with lower support scores reported on some indicators.
- Canadians from BC and Alberta are more likely than those from other provinces to view teaching about Asia as important; and respondents from BC, in particular, are most likely to rate facilitating trade as important.
- A majority of Canadians believe Asia is important to their province's prosperity, with Western Canadians and Northerners more likely than those in other regions to hold this view. Atlantic Canadians are more likely to be unsure about Asia's importance to their prosperity.

Canadians Value Economic over Cultural, Educational Ties with Asia



Respondents who answered "do not know" are excluded from these tables meaning totals may not add up to 100

Base: All respondents: 2010 (n=2903), 2011 (n=2926, 2012 (n=3129)

Q.7: At the provincial level, how important are the following measures for building stronger ties with Asia?



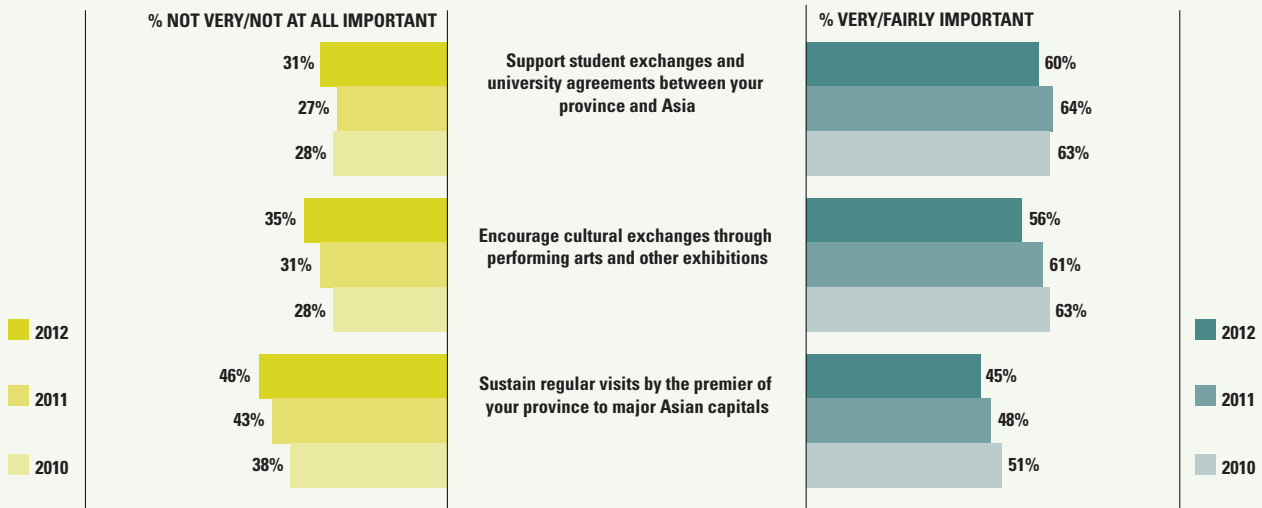
Respondents who answered "do not know" are excluded from these tables meaning totals may not add up to 100

Base: All respondents: 2010 (n=2903), 2011 (n=2926, 2012 (n=3129)

Q.7: At the provincial level, how important are the following measures for building stronger ties with Asia?

More than two-thirds of Canadians think their provincial governments should facilitate trade and investment missions for Canadian companies to visit Asia, and for Asian companies to visit Canada. There is much less support to have provincial schools teach about Asia and Asian languages. Only a quarter responded favourably to the teaching of Asian languages in the schools. Canadians are also divided in their support of having their premiers visit Asian capitals.

However, Canadians between the ages of 18-39 are more supportive of having schools teach about Asia (50%), and place more emphasis on teaching Asian languages (33%) and having student exchanges with Asian universities (63%).



Respondents who answered "do not know" are excluded from these tables meaning totals may not add up to 100

Base: All respondents: 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)

Q.7: At the provincial level, how important are the following measures for building stronger ties with Asia?

While a majority of Canadians value student exchanges with Asian universities and cultural exchanges in the performing arts, support for them has gone down over the past two years. Support for student exchanges declined by 3 points, and for cultural exchanges by 7 points, since 2010.

Provinces Value both Economic and Cultural Elements to Canada-Asia Relations

		NORTH	BC	AB	SK/MB	ON	QC	ATL
Facilitate trade and investment missions for Canadian companies to visit Asian countries	% Important	73	76	75	66	65	72	66
	% Less important	26	17	19	24	25	18	18
Facilitate trade and investment missions for Asian companies to visit Canada	% Important	71	78	72	64	65	68	64
	% Less important	26	16	21	24	25	22	20
Sustain regular visits by the premier of your province to major Asian capitals	% Important	38	51	50	47	40	48	42
	% Less important	59	42	40	42	50	44	42

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces. Respondents who answered “do not know” are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)

Q.7: At the provincial level, how important are the following measures for building stronger ties with Asia?

		NORTH	BC	AB	SK/MB	ON	QC	ATL
Support student exchanges and university agreements between your province and Asia	% Important	77	63	67	60	57	57	63
	% Less important	20	31	27	30	36	32	23
Encourage cultural exchanges through performing arts and other exhibitions	% Important	67	58	60	48	56	57	53
	% Less important	29	36	34	41	36	34	33
Place more emphasis on teaching about Asia in your province's education system	% Important	58	52	55	44	43	27	43
	% Less important	38	41	38	46	49	63	43
Place more emphasis on teaching Asian languages in your province's schools	% Important	26	37	35	17	24	18	23
	% Less important	71	57	58	72	69	74	63

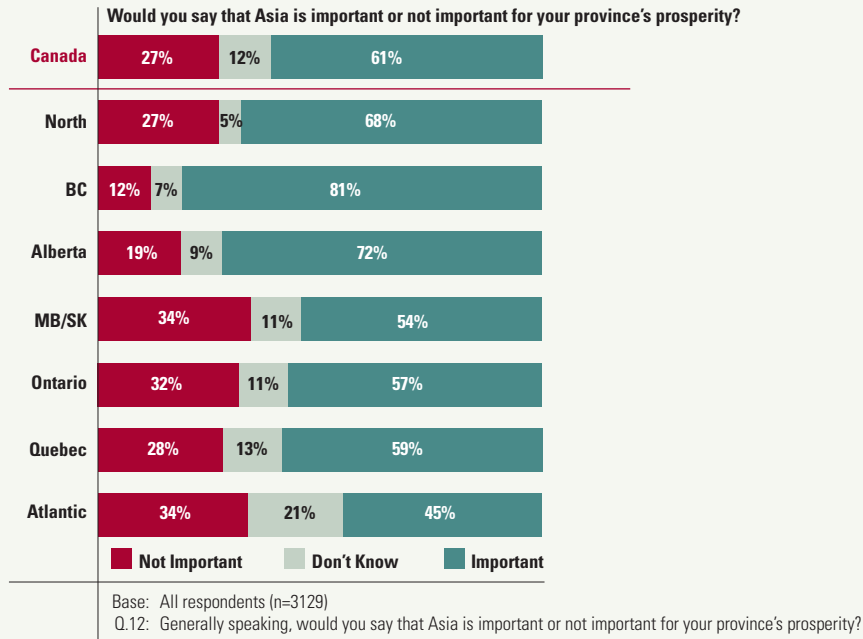
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Base: All respondents (n=3129)

Q.7: At the provincial level, how important are the following measures for building stronger ties with Asia?

While Canadians generally support strengthening Canada's economic relations over cultural ties with Asia, respondents from the North, BC and Alberta demonstrate that this difference is less stark. A majority of respondents living in the North (58%), BC (52%) and Alberta (55%) support teaching about Asia in schools, and over a third from BC (37%) and Alberta (35%) support teaching Asian languages. Well over two-thirds (77%) of respondents from the North support student exchanges with Asian universities.

Regional Differences about Importance of Asia to Province's Prosperity



Three in five Canadians (61%) across the different regions believe Asia is important to their province's prosperity. These numbers are highest in BC (81%), Alberta (72%) and the North (68%). Moreover, a significant proportion of respondents from BC (34%) and Alberta (23%) feel Asia is "very important" to their province. In contrast, Canadians from Atlantic Canada are more split, with 45% agreeing and 34% disagreeing, that Asia contributes to their province's prosperity.



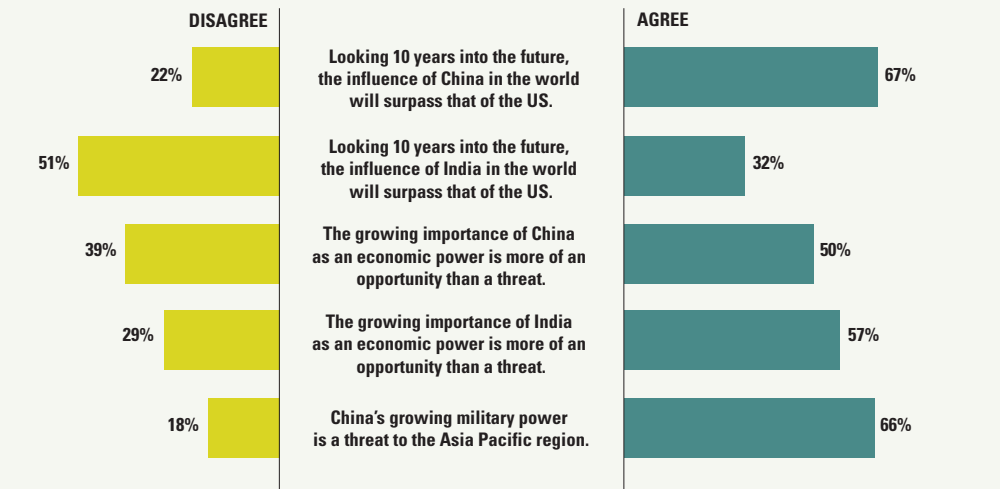
SECTION 4:

PERCEPTIONS ABOUT THE RISE OF CHINA AND INDIA

KEY FINDINGS

- **Canadians seem to be generally perceptive about shifts in the global order, with a significant majority agreeing that the influence of China will surpass that of the United States in 10 years. However, Canadians are less likely to believe this to be true of India's growth.**
- **Half of Canadians (50%) now believe that China's rise is an opportunity for Canada rather than a threat; this is up a full 7 points, from 43% in 2011.**
- **Canadians' concerns about China's military power as a threat in the Asia Pacific region have, however, increased significantly over the past year (60% to 66% in 2012).**
- **Ontarians are more likely than those living in other provinces to downplay the possibility of China surpassing the U.S. They are also less likely to perceive the rise of China and India as more of an opportunity than a threat.**

Canadians Don't Need to be Convinced of the Rise of China and India



Base: All respondents: (n=3129)

Q.5: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Two-thirds of Canadians believe China's influence in the world will surpass that of the U.S. in the next 10 years; they are less confident that India's rise will lead to the same global shift (32%) Canadians are more divided in their views on whether China's growing economic power is more of an opportunity than a threat. However, two-thirds believe that China's military power is a threat to the Asia Pacific Region.



Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)

Q.5: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

This year, Canadians are more likely to see China's and India's economic power as more of an opportunity rather than a threat. The percentage of Canadians who see China's rise as an opportunity increased to 50%, up from 43% in 2011; and for India, up from 52% to 57%. But concern about the threat of China's growing military power has also significantly increased over last two years, to 66% from 60% in 2011 and 58% in 2010.

Ontarians Less Convinced of the Rise of China and India

		NORTH	BC	AB	SK/MB	ON	QC	ATL
Looking 10 years into the future, the influence of China in the world will surpass that of the US	% Agree	70	72	69	66	62	72	57
	% Disagree	26	22	18	22	28	17	24
Looking 10 years into the future, the influence of India in the world will surpass that of the US	% Agree	40	34	36	29	32	32	29
	% Disagree	53	53	47	52	54	48	46
The growing importance of India as an economic power is more of an opportunity than a threat	% Agree	66	64	63	56	54	57	49
	% Disagree	26	26	24	29	34	27	26
The growing importance of China as an economic power is more of an opportunity than a threat	% Agree	52	54	55	50	47	51	48
	% Disagree	42	39	33	37	45	35	34
China's growing military power is a threat to the Asia Pacific region	% Agree	63	71	70	65	69	58	61
	% Disagree	25	18	14	20	16	21	14

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces.

Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)

Q.5: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Ontarians seem to have a more guarded view about China and India. They are less likely than Canadians living elsewhere to view both China's and India's economic power as more of an opportunity than a threat; and they are more likely than other Canadians to disagree with the assumption that China's influence in the world will surpass that of the U.S. in the coming decade. However, Ontarians' views of China as an opportunity rather than a threat has increased by 6 points over the past year.

In contrast, Northerners and Western Canadians seem more in tune with the rise of China and India. Over two-thirds of Canadians from the North, BC and Alberta view India's growing economic power as an opportunity rather than a threat. And, a little over a majority of Canadians from BC and Alberta agree that China's economic growth is more of an opportunity. There was a significant change in perception among Quebec residents; in 2012, Quebecers are much more likely to see China's growth as an opportunity rather than a threat, up 12 points from 2011 (51% vs. 39%).



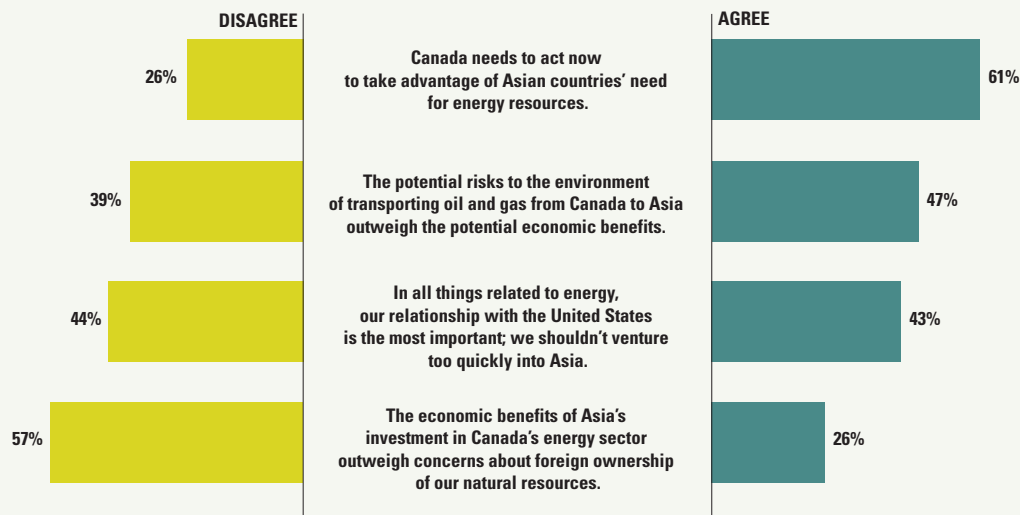
SECTION 5:

CANADA-ASIA ENERGY RELATIONS

KEY FINDINGS

- Overall, Canadians recognize the urgency and economic opportunity in meeting the rising energy demands of Asian countries. Canadians appear willing to move quickly into Asia despite the important energy ties Canada has with the U.S. Yet, they are hesitant about foreign state ownership of Canada's natural resources, and express concern about the environmental impact of developing the infrastructure needed to support energy exports to Asia.
- A majority of Canadians (61%) agree that Canada must act now to take advantage of Asia's need for energy resources, but most (57%) disagree with the notion that the economic benefits of Asia's investment in Canada's energy sector outweigh concerns about foreign ownership of our natural resources.
- A majority of Canadians support the building of a pipeline to facilitate export to Asia but a larger majority (62%) wants to have approval of affected First Nations communities to do so. This is especially true for Northern Canadians (74%).
- Canadians are divided in their views as to whether the potential economic benefits of transporting oil and gas to Asia outweigh the potential environmental risks.
- Albertans are especially supportive of the possibility of trading oil and gas with Asia and disagree that the environmental risks of transportation outweigh the benefits.

Canadians Willing to Look to Asian Markets to Export Energy Resources, but Foreign Ownership and Environmental Concerns make them Cautious



Base: All respondents: (n=3129)
 Q.13: Please indicate whether you agree or disagree with each of the following statements about Canada's relations with Asian countries in the energy sector.

A majority of respondents (61%) agree Canada should act now to take advantage of Asian countries' demand for energy. This was more keenly felt among Canadians who said they had business interests in Asia (70%), Canadians who were above 55 years of age (66%), and those whose annual earnings were above \$100,000 (68%). Despite the sense of urgency, a majority of Canadians express concern about Asian ownership of our natural resources (57%); they are split about the importance of the U.S. market in energy (44% vs. 43%); and a significant proportion are worried about the environmental impact of transporting oil and gas to Asia (47%).

Energy-Endowed Provinces Are More Keen to Meet Asian Demand

		NORTH	BC	AB	SK/MB	ON	QC	ATL
Canada needs to act now to take advantage of Asian countries' need for energy resources.	% Agree	63	60	73	60	58	61	59
	% Disagree	33	29	18	24	29	26	21
The potential risks to the environment of transporting oil and gas from Canada to Asia outweigh the potential economic benefits.	% Agree	46	55	37	45	45	54	34
	% Disagree	49	37	51	40	41	32	41
In all things related to energy, our relationship with the United States is the most important; we shouldn't venture too quickly into Asia.	% Agree	33	35	33	42	47	51	38
	% Disagree	60	54	58	46	41	36	43
The economic benefits of Asia's investment in Canada's energy sector outweighs concerns about foreign ownership of our natural resources.	% Agree	30	20	30	25	24	31	19
	% Disagree	67	68	56	60	59	50	54

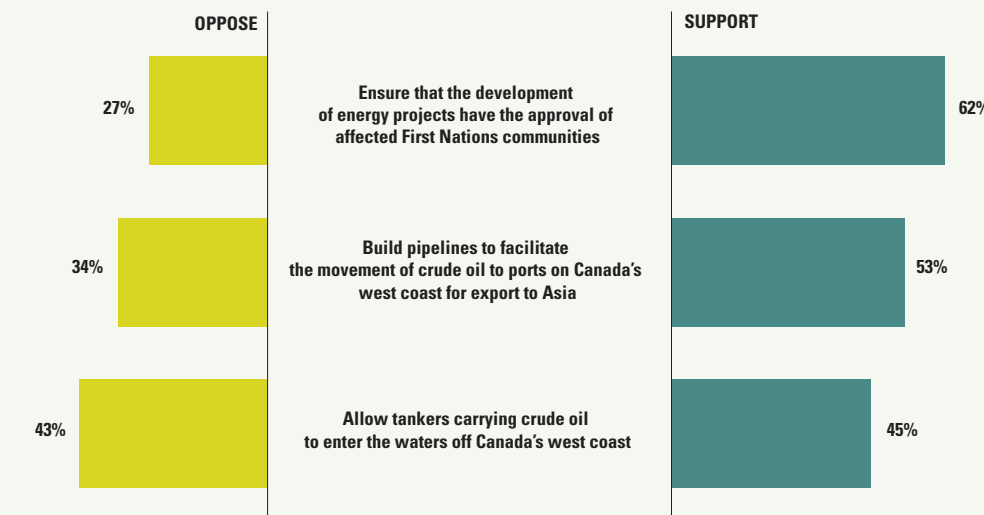
Cells that are shaded in darker colours indicate statistically significant differences related to other provinces. Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)
 Q.13: Please indicate whether you agree or disagree with each of the following statements about Canada's relations with Asian countries in the energy sector.

Albertans are also more likely than other regions to perceive economic benefits from Asian investment and are less concerned about foreign ownership of Canadian natural resources (30%). They are more likely to disagree about the importance of the U.S. market for energy exports (58%) and more likely to disagree that environmental risks posed by transporting oil and gas to Asia outweigh the economic benefits (51%). Quebeckers share Albertans' views about the economic benefits of Asian investment and express less fear about foreign ownership of Canada's energy resources (31%).

However, Quebeckers (51%) and Ontarians (47%) are more likely to agree about the importance of the U.S. market. This is in direct contrast to Canadians from the North (60%), BC (54%) and Alberta (58%). On the question of potential environmental risks, Quebeckers (54%) and British Columbians (55%) are more likely to agree that they outweigh the potential economic benefits.

Canadians Are Split about Facilitating the Transport of Oil and Gas Exports Asia



Base: All respondents: (n=3129)

Q.14: To what degree would you support or oppose each of the following policy actions for pursuing opportunities with Asian countries in the energy sector?

A slight majority of Canadians (53%) support building pipelines to facilitate the movement of crude oil to ports on Canada's west coast for export to Asia. However, Canadians are divided about whether or not to allow tankers carrying crude to enter waters on Canada's west coast (45% in favour, 43% oppose). A significant majority (62%) believe that energy projects should have the approval of affected First Nations communities.

Canadians with business connections in Asia as well as those who earned above \$100,000 or more in annual income are also more likely to support both the construction of pipelines and the presence of crude-carrying tankers on Canada's west coast.

Provinces Are Divided about Facilitating the Transport of Oil and Gas Exports Asia

		NORTH	BC	AB	SK/MB	ON	QC	ATL
Build pipelines to facilitate the movement of crude oil to ports on Canada's west coast for export to Asia	% Support	52	49	69	56	56	46	53
	% Oppose	44	44	22	30	33	37	29
Allow tankers carrying crude oil to enter the waters off Canada's west coast	% Support	49	38	60	44	44	43	46
	% Oppose	49	56	29	43	45	42	37
Ensure that the development of energy projects have the approval of affected First Nations communities	% Support	74	60	55	50	66	62	57
	% Oppose	25	33	36	38	26	20	25

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces.
 Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)

Q.14: To what degree would you support or oppose each of the following policy actions for pursuing opportunities with Asian countries in the energy sector?

Over two-thirds of Albertans support building pipelines to allow the transport of crude oil to Canada's west coast, as well as allowing tankers carrying crude oil to enter waters off Canada's west coast. 63% of Canadians 55 years of age or older who have an income of \$100,000+ are also more likely to support these measures. The same is true for 70% of those who have business interests in Asia.

In contrast, Canadians from the North and BC are less likely to support the building of pipelines, with 44% in opposition from both regions. A majority of British Columbians (56%) are opposed to allowing tankers to carry crude oil to enter waters off the west coast.

74% of Northerners believe that energy projects should obtain the approval from affected First Nations communities, while Canadians from Alberta and Saskatchewan/Manitoba are less likely to agree.



SECTION 6:

HUMAN RIGHTS IN ASIA

KEY FINDINGS

- While a majority of Canadians agrees that promoting human rights and democracy should remain a priority in Canada's relations with Asian countries, support has declined significantly since 2011. A large majority also believes that Canadian Government should be careful about preaching human rights to Asia before addressing its own record; and most believe that it is possible to promote business in China while raising human rights concerns.
- Northerners are more likely than Canadians from other regions to view human rights promotion as a major priority. Canadians from BC and Alberta are more likely than those living in other regions to agree that Canada can pursue its business interests and raise human rights concern at the same time (74%).

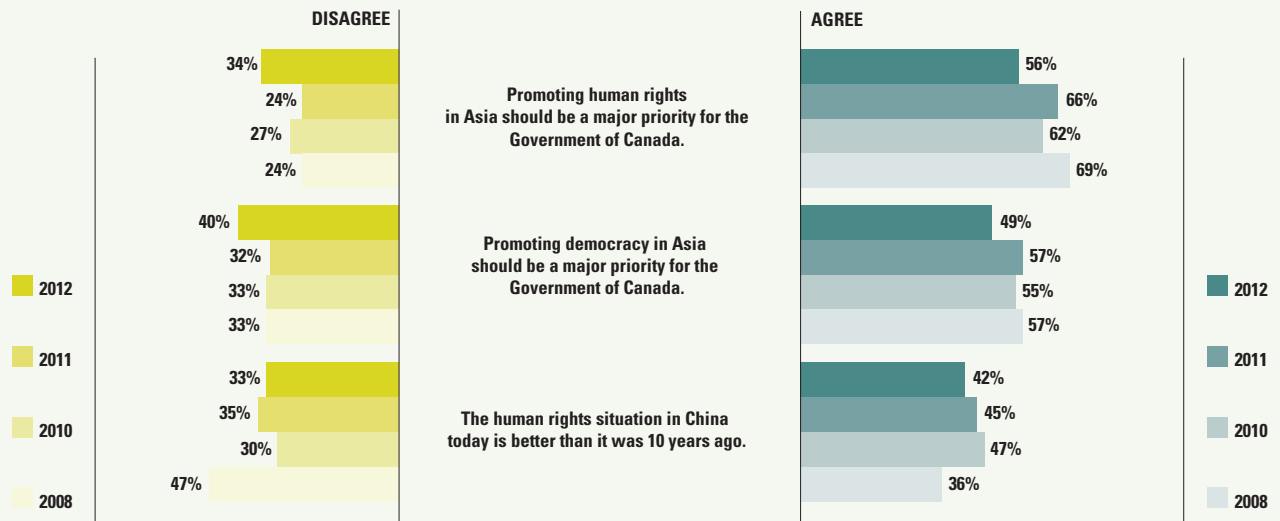
Canadians are Principled, but Pragmatic, about Promoting Human Rights and Democracy in Asia



Base: All respondents: 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)
 Q.6: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Canadians have a pragmatic view about addressing issues of human rights and democracy in Canada's relations with Asian countries. Over half (56%) think promoting human rights should be a priority but an even larger majority (63%) believes that Canada should look at its own record first; and two-thirds (67%) believe Canada can promote business and raise human rights issues in China at the same time.

Promoting Human Rights and Democracy Has Fallen as Priority for Canada's Foreign Policy with Asia



Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129)
 Q.6: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

In 2012, fewer Canadians than in the past believe that human rights conditions in China are better than 10 years ago. Despite this, support for promoting human rights in Asia has declined by 10 points from 2011 and by 6 points from 2010. Support for promoting democracy fell by 8 points since 2011 and 6 points since 2010.

Promoting Human Rights and Democracy in Asia by Provincial Breakdown

		NORTH	BC	AB	SK/MB	ON	QC	ATL
It is possible for the Government of Canada to promote business in China and at the same time raise human rights concerns	% Agree	72	74	74	67	66	64	63
	% Disagree	24	18	18	20	24	24	21
Canada should get its own human rights house in order before it preaches to Asian countries to take action on human rights	% Agree	61	64	60	60	61	68	66
	% Disagree	34	32	34	30	32	23	23
Promoting human rights in Asia should be a major priority for the Government of Canada	% Agree	67	59	57	55	56	54	54
	% Disagree	31	35	34	34	35	34	30
Promoting democracy in Asia should be a major priority for the Government of Canada	% Agree	53	48	47	45	47	50	52
	% Disagree	44	43	42	43	42	35	31
The human rights situation in China today is better than it was 10 years ago	% Agree	48	42	41	47	42	41	41
	% Disagree	42	34	29	28	34	33	28

Cells that are shaded in darker colours indicate statistically significant differences related to other provinces.

Respondents who answered "do not know" are excluded from these tables meaning totals do not necessarily add up to 100

Base: All respondents (n=3129)

Q.6: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Three in five Canadians (61%) across the different regions believe Asia is important to their province's prosperity. These numbers are highest in BC (81%), Alberta (72%) and the North (68%). Moreover, a significant proportion of respondents from BC (34%) and Alberta (23%) feel Asia is "very important" to their province. In contrast, Canadians from Atlantic Canada are more split, with 45% agreeing and 34% disagreeing, that Asia contributes to their province's prosperity.

BAM RESULTS AND METHODOLOGY

THE BAM ANALYSIS EXPLAINED

- In order to better understand why some countries are viewed more favourably or warmly than others, a simple but effective analysis called a **Brand Advancement Measures (BAM)** was performed. The main purpose of this exercise is to determine in a general sense what Canadians value most from countries and then determine the extent to which each country “owns” those attributes/characteristics.
- The technique is often used for an analysis of competing brands of consumer goods. It is built on the assumption that brands are a collection of perceptions in the mind of the consumer, and that as consumers get to know a brand, their relationship with that brand develops from a fledgling awareness to a deep connection with its unique and compelling benefits.
- The strongest brands are typically well understood and have real profile in the marketplace. They have a distinct image and are powerfully and distinctively associated with attributes that drive choice in their category.
- This exercise was transposed from the consumer goods sector to the global political marketplace. Respondents to the survey completed the exercise by first rating whether they had a favourable or unfavourable view of listed countries. Respondents were then asked a follow up question in which they were presented with a list of attributes and asked to associate specific attributes to specific countries
- The total number of associations with each attribute for each country were calculated and correlated with the likelihood of having a favourable view of that country. The result of the correlation was the determination of relative importance of each attribute in driving favourable views of countries. This kind of analysis provides a map of which attributes/ characteristics matter most to Canadians and the extent to which each country “owns” those attributes. Additionally, country “brand” health scores are tabulated to determine “Profile,” “Originality” and “Power” scores.
- **Profile:** How well do respondents know the country? Brand profile score is the overall average percentage of association across all attributes for country.
- **Originality:** How original is the country? For any given respondent, a country is considered to be an original on an attribute if it is the only country from the list he/she associates with that attribute.
- **Power:** How much does the country own the attributes that drive favourability? The data from the “brand” association exercise is metricized to increase the differentiation between ratings among countries across respondents. In other words, the more a country owns attributes with high relative importance, the greater the power score.
- Applied to countries’ favourability, the BAM analysis showed that the most powerful attribute driving a favourable outlook is the perception that a country is “friendly”. Least likely to drive favourability is a perception that a country is “growing”, “in decline” or “boring”. The top ten drivers of favourability are listed on the following page.

DRIVERS OF FAVOURABLE/UNFAVOURABLE OUTLOOK

- The BAM analysis showed that all 12 attributes listed in the Table taken together can explain 30 per cent of the variability of favourable outlook.
- Perceiving a nation as friendly is responsible for 17 per cent—it is therefore the top driver of favourable outlook towards a nation.
- Drivers of favourability also include negative associations (**highlighted in red**) such as “Corrupt” or “Threatening”. These are viewed as the greatest barriers towards a favourable outlook or the biggest drivers towards an unfavourable opinion.

TOP TEN DRIVERS

RANKING	ATTRIBUTE	RELATIVE IMPORTANCE
1	Friendly	17%
2	Free	12%
3	Admired	11%
4	Exciting	10%
4	Corrupt	10%
4	Threatening	10%
5	Disliked	9%
6	Honest	7%
7	Strong	5%
8	Progressive	4%
9	Authoritarian	3%
10	Weak	2%

BAM PROFILES FOR INDIVIDUAL COUNTRIES

Canadians' familiarity with the U.S. is reflected in the top scores it receives for Profile and Originality. The leader for the most important measure of our analysis, "Power" which sums up which country is attributed the most drivers of favourability, is Australia by a large margin. The following pages takes a look at each country individually.

BAM OVERALL RESULTS

	AUSTRALIA	UK	FRANCE	JAPAN	USA	SOUTH KOREA	INDIA	SE ASIA	CHINA
PROFILE	18%	16%	14%	15%	20%	11%	12%	10%	17%
ORIGINALITY	44%	35%	35%	31%	55%	26%	28%	21%	44%
POWER	15%	9%	8%	8%	7%	4%	4%	4%	3%

PROFILE: *How well do Canadians know the country?*

Brand profile score is the overall average percentage of association across all attributes for each country.

ORIGINALITY: *How original is the country?*

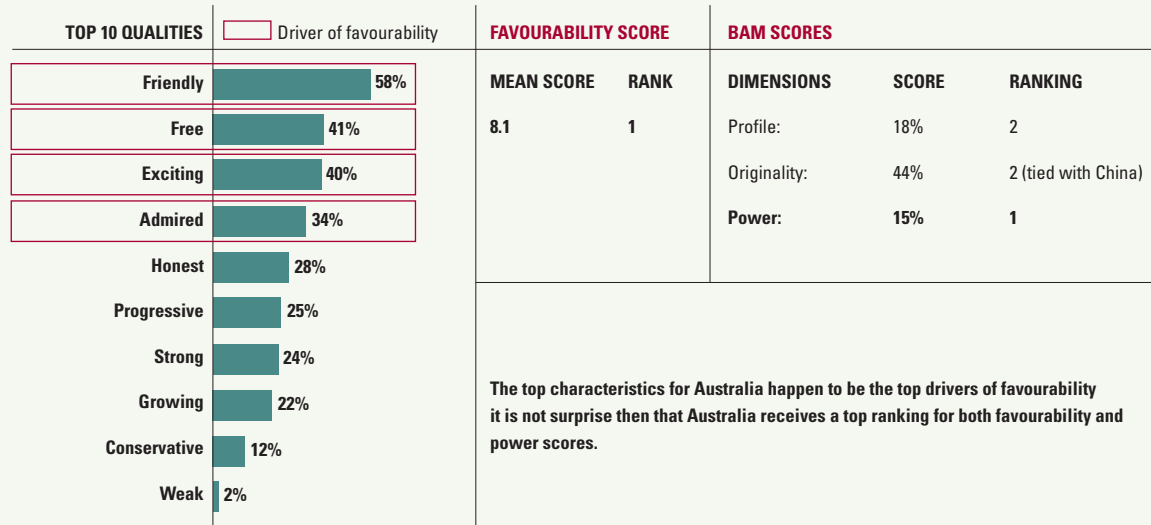
For any given respondent, a country is considered to be an original in an attribute if it is the only country he/she associates with that attribute.

POWER: *How much does a country own the attributes that drive favourability?*

The more a country owns attributes with high relative importance, the greater the power score.

APPENDIX

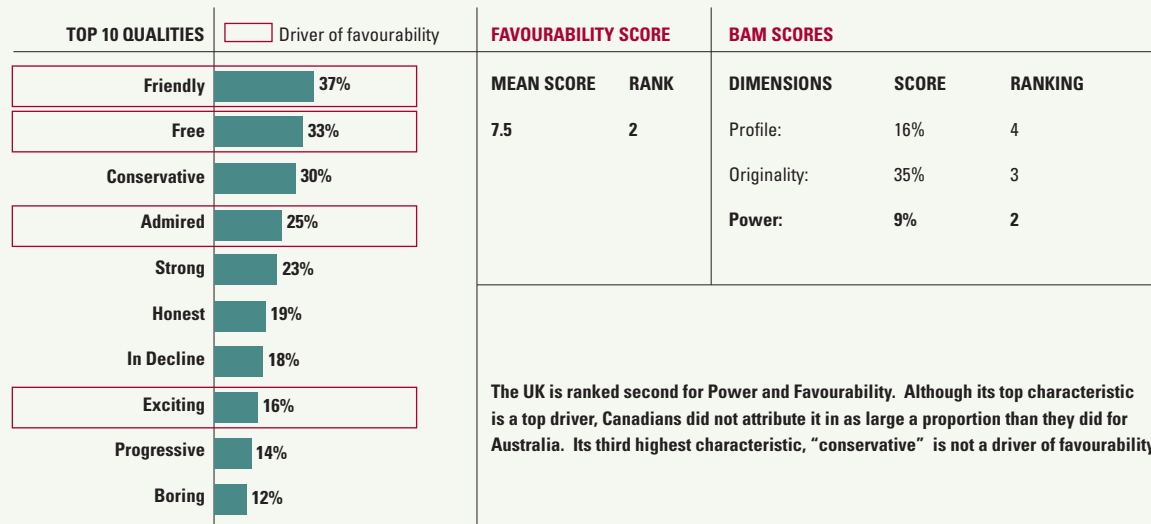
FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: AUSTRALIA



Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: UNITED KINGDOM

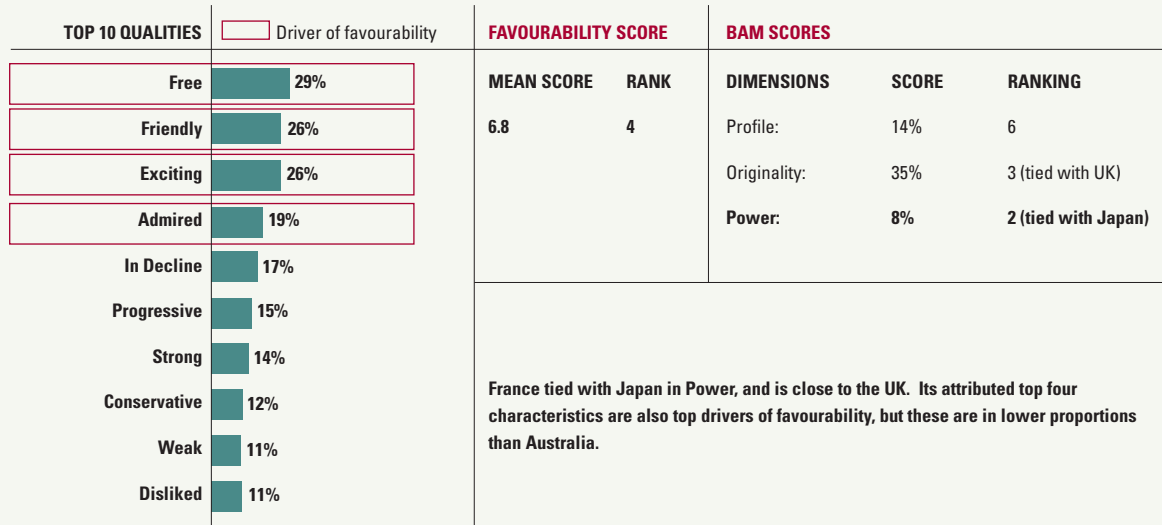


Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

APPENDIX

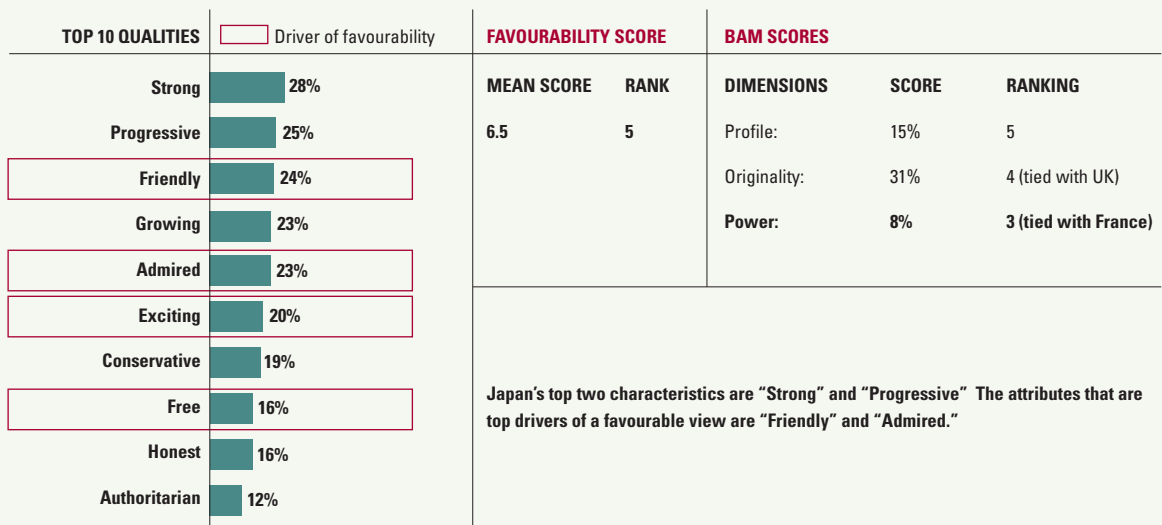
FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: FRANCE



Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: JAPAN

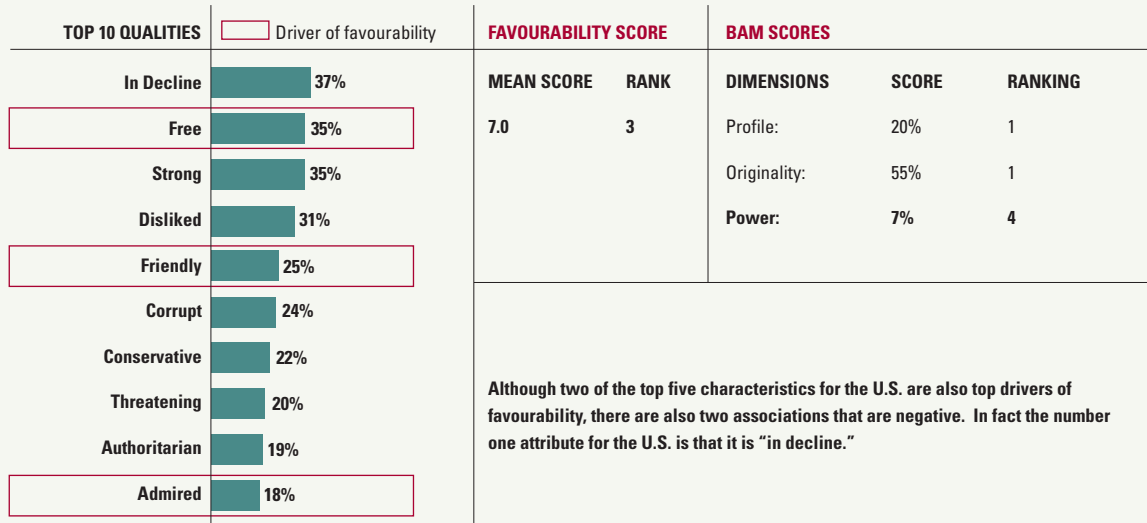


Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

APPENDIX

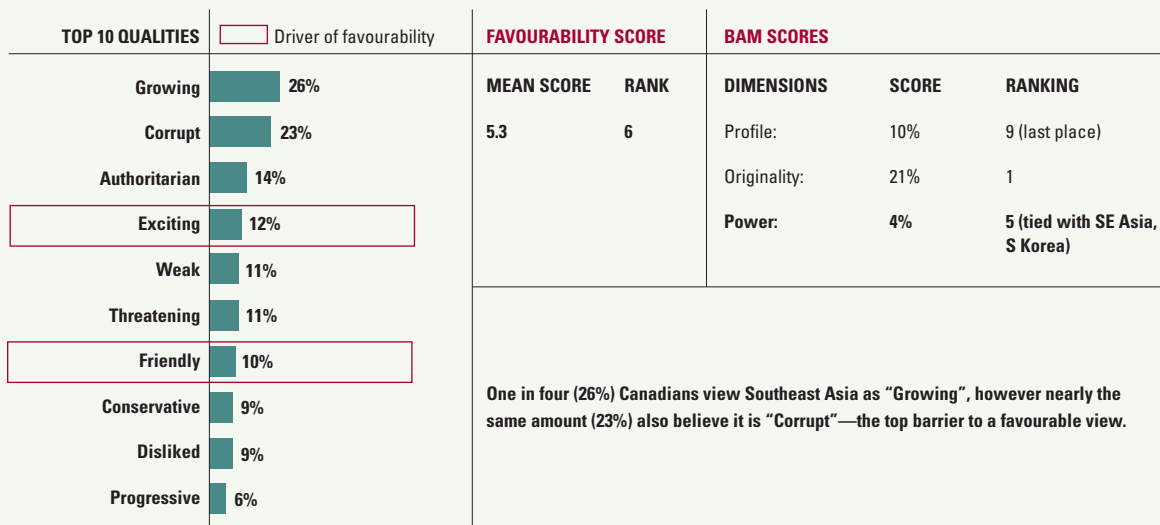
FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: UNITED STATES



Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: SOUTHEAST ASIA

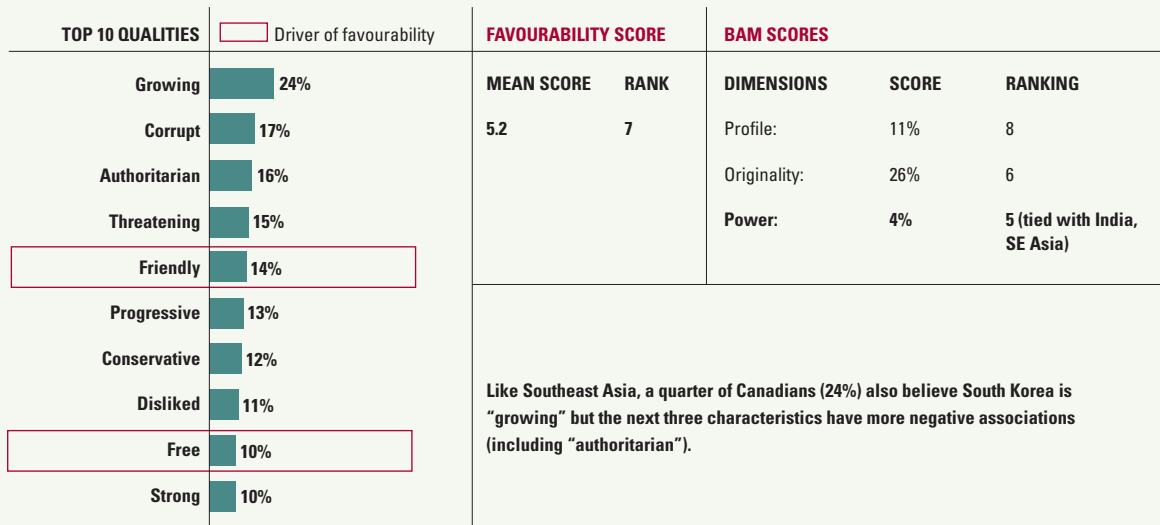


Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

APPENDIX

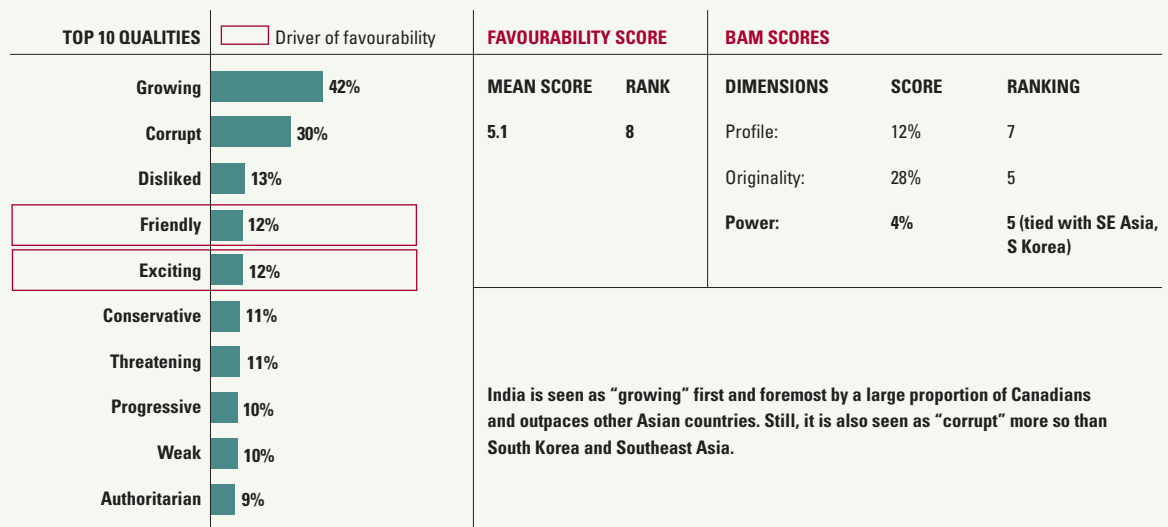
FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: SOUTH KOREA



Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: INDIA

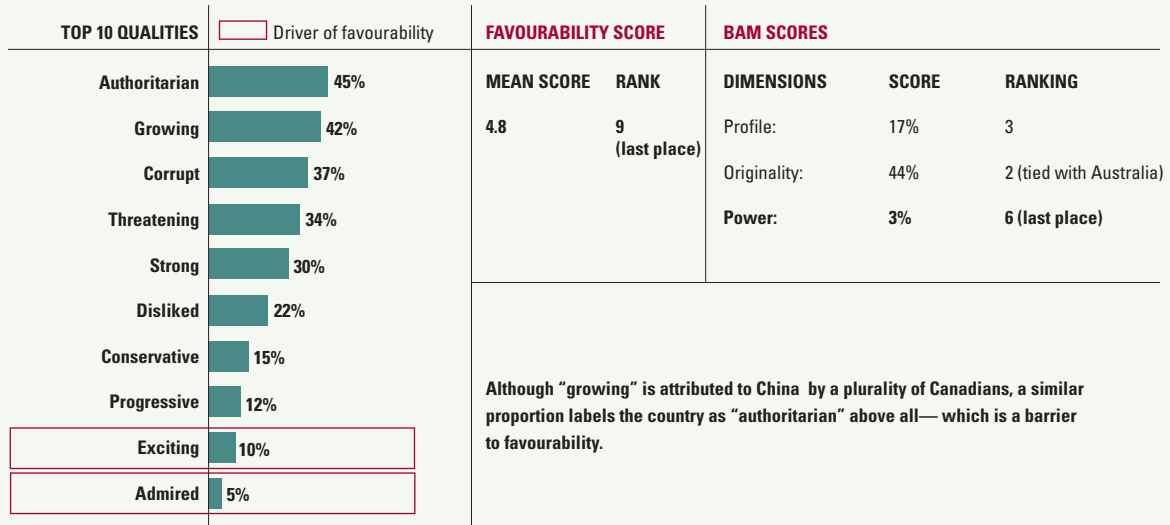


Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

APPENDIX

FACTORS CONTRIBUTING TO FAVOURABLE OUTLOOK: CHINA



Base: All respondents (n=3129)

Q.1a: Please select which of the countries or regions below you feel possess the following qualities (you can pick more than one country for the same attribute):

Asia Pacific
Foundation
of Canada

Fondation
Asie Pacifique
du Canada



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Vancouver, BC V6C 1J9

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