

2013

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 on Asia and of the region's increasing relevance to Canada's prosperity. The National Opinion Poll, with its large sample size of over 3,400 Canadians, 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 questions that emerge from the poll's findings.

This year's poll identifies shifts in Canadian public opinion on Canada-Asia relations and on where Asia fits in Canadians' mindsets. This year's survey delves deeper into Canada-Asia foreign and economic relations, provincial governments' roles in fostering ties with the region and Canada's relations with Asia on energy. It also considers Canada's position on human rights in the region, conditions attached to development assistance, and major security concerns. Taken together, the 2013 National Opinion Poll provides the most comprehensive picture to date of how Canadians think and feel about Asia, and it does so amid national debates on Canada's future role in the Asia Pacific region.

METHODOLOGY

From March 8 to March 15, 2013, Angus Reid Public Opinion conducted an online survey among 3,474 Canadian adults who are Angus Reid Forum panelists. The margin of error—which measures sampling variability—is +/- 1.7% for the entire sample. The results have been statistically

weighted according to the most current 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 approximately 15 minutes.

KEY FINDINGS OF THE 2013 NATIONAL OPINION POLL

1. CANADIANS SEE ASIA AS AN IMPORTANT REGION FOR CANADA, BUT APPROACH IT WITH LESS ENTHUSIASM THAN IN THE PAST

With continued growth in the Asia Pacific and intensified federal and provincial government efforts to pursue trade and investment opportunities in the region, Canadians last year seemed to want to fully grasp the opportunities of a rising Asia in a new world order. Today, Canadians seem to be slightly less enthusiastic. While it would be wrong to suggest that Canadians have lost their appetite for engagement with Asia, this year's APF Canada survey findings do hint at a cooling of attitudes. Notwithstanding this slight shift in public opinion, Canadians continue to view the Asia Pacific region as offering significant opportunities for Canada. A majority of the population (51%) still believes that strengthening economic and political relations with Asia should be a top foreign policy priority for the government. What's driving their views?

As in previous public opinion polls of the Canadian population, this year's APF Canada survey suggests positive views of Asia are fundamentally tied to the economy. Compared to 2012, more Canadians now feel Asian countries are "very important" to Canada's prosperity, particularly India (28%, up 12 points from 2012), Japan (33%, up 7 points), and South Korea (15%, up 5 points). China sits atop the list at 45%, virtually unchanged from 12 months ago (46%). Most provincial populations also believe that Asia is important for their province's prosperity. Further, a majority of Canadians continue to view the growing economic power of India (54%) and China (48%) as more of an opportunity for Canada than a threat.

Despite these positive signs, there have been statistically significant shifts downward in the degree to which Canadians embrace the Asia Pacific, even when it comes to economic matters. For example, there's less support today than 12 months ago for Canada entering into free trade agreements with Japan (60%, down from 63% in 2012) or China (42%, down from 48% in 2012). And, while Asia is considered a top foreign policy priority, the number has dipped 4 points from 2012 (to 51% in 2013). Far fewer Canadians now see Canada as part of the Asia Pacific region – down 11 points to 18% compared to last year (29%), the

lowest percentage ever. These results may reflect a decline in Canadian optimism regarding what can be achieved in a region where economic growth rates are decelerating.

2. CANADIAN SUPPORT FOR ASIAN INVESTMENT IN CANADA HAS WEAKENED

APF Canada's National Opinion Poll results suggest that the Canadian population is beginning to question the claimed advantages of having Asian companies invest in the Canadian economy. National turmoil over the recent acquisition of two Canadian oil and gas companies by Asian state-controlled companies has undoubtedly contributed to greater unease among Canadians fearful of losing control of the country's natural resources to Asia.

While half of Canadians (50%) continue to feel that Canada would benefit from more Asian investment, support has fallen 7 points from 12 months ago, and 9 points in the past 3 years. Further, provincial populations across Canada are against their provincial governments giving priority to investment from Asia (on average, 59% oppose). And, a strong majority of Canadians continue to oppose direct investment from Asian state-owned enterprises (SOEs) from China (76%), India (72%) and Japan (58%), while opposition is more muted when it comes to SOE's from Great Britain (39%), Norway (44%), and France (53%).

Nevertheless a majority of Canadians (close to 6-in-10) continue to support trade and investment missions for Canadian and Asian companies to visit both sides of the Pacific. However, the numbers who do so have dropped significantly over the past year (by approximately 10 points).

Canadians also express very mixed views about giving economic incentives to Canadian companies to help them set up operations in Asia.

3. CANADIANS ARE OPEN TO CULTURAL/STUDENT EXCHANGES WITH ASIA, BUT HESITANT TO FOCUS ON BUILDING ASIAN LANGUAGE COMPETENCIES

Canadians' attachment to Asia draws upon the many people-to-people relationships built up over the past decades, back to the beginning of the last century.

The data suggests that there is today in Canada a broad appreciation of Asian cultures and languages. That said, APF Canada survey results in 2013 show a Canada that is not yet prepared to go to a new level of understanding of Asia through building knowledge and language competence into its learning environments. This may be in part due to the fact that while Canadians are increasingly traveling to Asia (16% reported traveling to Asia in 2013, up 2 points from last year), a relatively low percentage of the population has had an opportunity to familiarize itself more deeply with the region through living or working there (5% reported living and/or working in Asia). Indeed, those who have lived or worked in Asia are more than twice as likely as those who have not to consider Canada part of the Asia Pacific region (38% vs. 17%), and to support placing greater emphasis on teaching Asian languages in schools (63% vs. 30%).

Canadians across the country express support for their provincial government trying to build stronger ties with Asian countries through cultural exchanges (e.g. performing arts and other exhibitions). A majority is also behind increasing the number of student exchanges and university agreements with Asia. British Columbia and Ontario residents are particularly strong backers of these exchanges.

This positive “reaching out” to Asia contrasts dramatically, however, with the strong opposition to any provincial government action to place more emphasis on teaching Asian languages in their province’s schools (on average, 58% oppose). This is particularly true in provinces east of Alberta.

4. CANADIANS ARE INCREASINGLY CONFLICTED ON ENERGY RESOURCE DEVELOPMENT FOR EXPORT TO ASIA; IMPORTANT REGIONAL DIVISIONS PERSIST

Energy issues dominated public debates across Canada over the past year, with pipelines (e.g. Enbridge’s Northern Gateway, TransCanada’s Keystone XL, Kinder Morgan pipeline expansion), tankers, and foreign takeovers of Canadian oil and gas companies (e.g. Nexen, Progress) feeding the discussions and headlines. In the process, Canadians have become more divided than ever on the best path forward and are wary of the

focus being put on Asia. For example, fewer today feel a sense of urgency to take advantage of Asian countries’ need for energy resources (53% in 2013 vs. 61% in 2012). Indeed, many more Canadians now feel that Canada should not move too quickly into Asia and instead think that it should focus on its energy relationship with the United States (up 6 points to 49%).

More specifically, there is a growing national divide on building transportation infrastructure to facilitate the movement of crude oil or natural gas to Canada’s west coast for export to Asia. For example, support for building pipelines to export crude oil has dropped 8 points over the past 12 months to 45%, while opposition has jumped 6 points to 42%. Support for allowing tankers carrying crude oil to enter waters off the west coast is at 37%, down 8 points from 2012, while opposition has increased 5 points to 48%.

The lack of consensus on the transportation of energy resources is also reflected in the lack of clarity in public opinion when it comes to the economic and environmental trade-offs, benefits, and risks associated with energy development. While a slim majority of Canadians believe the environmental risks of transporting oil and gas to Asia outweigh any potential economic benefits (e.g. jobs, economic development), a full third disagree. They are divided in their views on whether the contribution that corporate taxes make to government coffers, which help pay for public services, outweighs the environmental risks of exporting oil and gas to Asia.

The Canadian population is also divided in its views on the role First Nations might play in decisions related to the development of energy resources for export to Asia. Twelve months ago, a solid majority of Canadians supported the idea of giving First Nations communities a prominent role in these decisions; this support has plummeted 16 points. Now, 46% support and 41% oppose such a role. This same lack of consensus exists when it comes to seeking approval of affected First Nations communities before any energy resource development proceeds – 46% support this policy, 38% oppose it.

Importantly, Canadians across the different provinces do not share the same views on energy

infrastructure development to facilitate the export of oil and gas resources to Asia. The starkest contrast is between Albertans and British Columbians, who sit on either side of a very distinct regional divide, the former pushing for increased movement of oil and natural gas, the latter much more opposed to the idea. Public opinion in the rest of the country is generally more supportive, but also quite divided in its views.

5. CANADIANS SUPPORT “PRAGMATIC ACTION” ON HUMAN RIGHTS AND “CONDITIONS” ON DEVELOPMENT ASSISTANCE IN ASIA

Canadians have open eyes and hearts when it comes to supporting positive action on human rights and democracy in Asia, and are prepared to see Canada open up its development assistance coffers to Asian countries. However, they want to see results and would like Asian countries to take more responsibility for their own development.

Canadians are very much behind the federal government putting the promotion of human rights and democracy in Asia at the top of its priority list. This is perhaps coincident with their perceptions that the human rights situation in China continues to worsen, dropping 2 points between 2012 and 2013 (5 points over the past three years). However, while the importance Canadians attribute to human rights has increased 4 points over the past year, it is still below levels seen five years ago. Moreover, public opinion is divided about whether or not Canada should stop doing business with or in Asian countries where there are human rights concerns. Indeed, most believe that Canadians should address human rights issues at home in Canada before “preaching” to Asian countries.

When it comes to official development assistance, Canadians are quite supportive of providing assistance to Asian countries, but are very much of the view that it should only be given if recipient countries demonstrate progress in adopting democratic norms and fostering good governance. A majority also believe development assistance should be used to support Canadian trade and investment objectives in Asia. However, Canadians are less convinced that development assistance should be conditional upon countries using it to foster their own economic growth (43% agree, 39% disagree).

Furthermore, a solid majority of Canadians oppose Canada giving development assistance to large and growing Asian economies, like India and China, even if those countries have a significant number of the world’s poor. Most believe that countries like China and India should themselves give assistance to poorer countries.

6. CANADIANS FORESEE MILITARY CONFLICT IN THE ASIA PACIFIC, BUT ARE DIVIDED ON DIRECT CANADIAN INVOLVEMENT IN REGIONAL SECURITY

Recent events in North Korea and raised tensions in the South China Sea over the past year appear to be having an impact on the Canadian public’s views of security issues in the region and their thoughts on what role Canada might play there. A majority of Canadians believe that outright military conflict between Asian countries is likely in the next 10 years. This is despite a 5-point drop in perceptions over the past year that China’s growing military power is a threat to peace in the Asia Pacific.

Most Canadians believe that military conflicts in the Asia Pacific directly affect Canada’s security and a majority want the government to take a clear position on territorial disputes in the region. But public opinion is almost evenly divided (41% agree, 39% disagree) on whether Canada should increase its participation in regional security initiatives.

7. GENERATIONAL DIFFERENCES PERSIST IN VIEWS OF CANADA’S RELATIONS WITH ASIA PACIFIC

Results from APF Canada’s National Opinion Poll of Canadians’ views on Asia reveal older Canadians (55+) continue to have a more positive overall view of Asia than their younger counterparts, notably those 18-29 years of age. In particular, younger Canadians consistently place less value on the potential benefits of Canada engaging economically with Asia. This is true for perceptions of the importance of Asian countries to Canada’s prosperity, support for Free Trade Agreements with Asian countries, and support for efforts of the Canadian government to facilitate trade and investment with countries in the region.

SECTION 1:

PERCEPTIONS OF ASIA

Key Findings

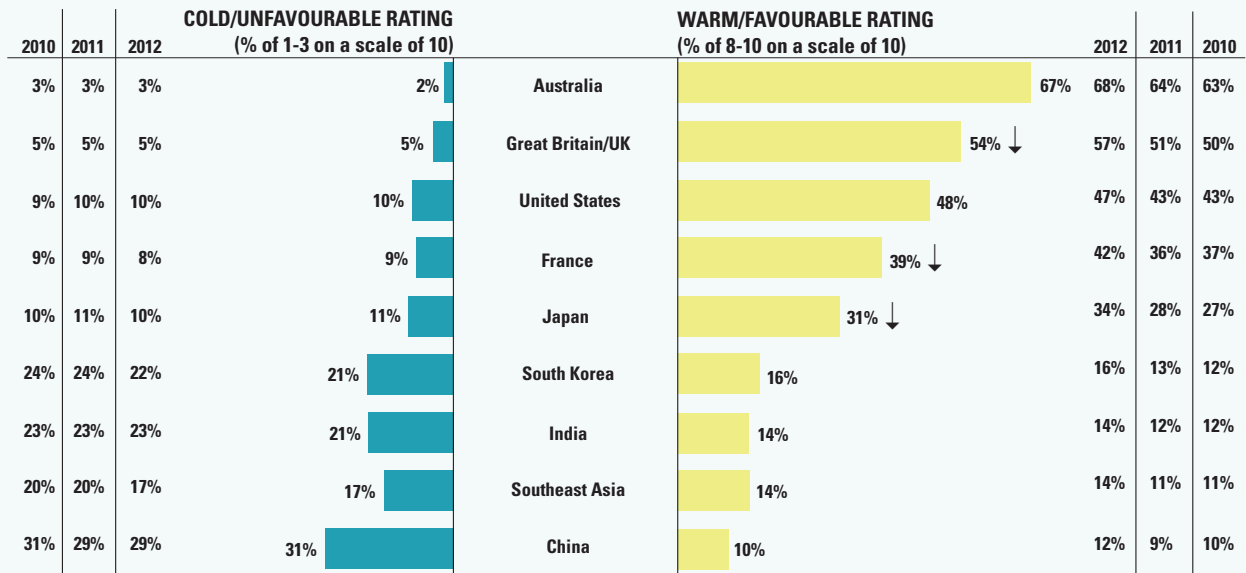
- In this year's poll, Canadians were much less likely to consider Canada part of the Asia Pacific region than at any time in the past 5 years. While 18% agree that Canada is an Asia Pacific country, this is a statistically significant 11-point drop from their views just 12 months ago (29% in 2012). And, fully 47% are now strongly resistant to the idea of Canada being part of the Asia Pacific, a dramatic 17-point rise from 2012.
- China and Japan top the list of Asian countries Canadians feel Canada should place the greatest emphasis on in its foreign relations with the region. India and Australia occupy the second tier. Far fewer think Canada should give top attention to South Korea or Indonesia.
- Among Asian countries, Canadians feel the greatest warmth towards Japan; it is the only country in Asia for which more Canadians hold more positive than negative views, though fewer do so than was the case 12 months ago (a 3-point drop).
- China continues to sit at the bottom of the list of all countries, with three times as many Canadians saying they have unfavourable or "cold" feelings towards this Asian country as those saying they have favourable views.
- British Columbians (39%) and northern Canadians (46%) remain those most likely to consider Canada an Asia Pacific nation; less than 1-in-5 elsewhere share this sentiment (the lowest percentage in Quebec – 12%). However, even in these two regions, far fewer people hold this view in 2013 than was the case in 2012 (BC – 57%, North – 55%).
- Albertans feel that Canada should place the greatest emphasis on its foreign relations with China. BC and Ontario, relative to other provinces, want the focus to be on India, while northern Canadians would like the greatest emphasis to be on Australia or Indonesia.

Canadians are reluctant to embrace Asian countries

Canadians continue to hold more positive or “warmer” feelings towards Western countries than they do towards those in Asia. Australia tops the list, well ahead of Great Britain, the United States, and France. Among Asian countries, Canadians feel the greatest warmth towards Japan; it is the only country in Asia for which more Canadians hold more positive than

negative views, though fewer do so than was the case 12 months ago (a 3-point drop). China continues to sit at the bottom of the list of all countries, with three times as many Canadians saying they have unfavourable or “cold” feelings towards this Asian country rather than favourable views.

Canadians Express “Cool” Feelings towards Asian Nations



Base: All respondents (n=2903 in 2010, 2926 in 2011, 3129 in 2012, 3474 in 2013)

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

Unlike in past years, Canadians' views of Asian countries are fairly consistent across the provinces and northern territories, with a few exceptions: British Columbians tend to be more

positive about Japan than those in other provinces, and northern Canadians express warmer feelings about China and South Korea.

Warm Feelings of Countries and Regions by Provincial Breakdown

WARM/FAVOURABLE RATING (% of 8-10 on a scale of 10)

	NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Australia	63%	72%	75%	68%	67%	73%	52%	71%
United Kingdom	53%	60%	61%	55%	55%	62%	36%	57%
United States	62%	47%	50%	43%	51%	49%	45%	49%
Japan	39%	42%	31%	30%	23%	31%	28%	28%
France	36%	34%	32%	29%	28%	37%	52%	33%
Southeast Asia	14%	15%	15%	15%	13%	13%	12%	15%
South Korea	30%	20%	16%	17%	13%	17%	11%	15%
India	27%	16%	14%	15%	11%	14%	13%	16%
China	27%	14%	10%	10%	10%	10%	10%	9%

○ Denotes statistically significant differences among provinces

*caution small base size in North n=50

Base: All respondents (n=3474)

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

Those most likely to hold negative or “cool” feelings about China are more likely to live in BC or Alberta. India generates somewhat less unfavourable sentiments; South Korea is more negatively viewed east of British Columbia.

China is perceived more negatively by individuals who have neither traveled nor worked in Asia, and are not of Asian heritage.

Cool Feelings of Countries and Regions by Provincial Breakdown

COLD/UNFAVOURABLE RATING (% of 1-3 on a scale of 10)

	NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
China	21%	35%	34%	32%	33%	32%	26%	29%
South Korea	21%	15%	22%	22%	25%	19%	24%	23%
France	28%	9%	15%	9%	8%	9%	6%	9%
India	29%	9%	15%	9%	8%	9%	6%	9%
Southeast Asia	20%	24%	23%	26%	27%	23%	16%	19%
United States	1%	12%	9%	13%	9%	9%	10%	12%
United Kingdom	1%	3%	4%	6%	2%	3%	9%	4%
Japan	2%	7%	10%	13%	12%	11%	12%	14%
Australia	—	2%	3%	3%	2%	1%	3%	3%

○ Denotes statistically significant differences among provinces

*caution small base size in North n=50

Base: All respondents (n=3474)

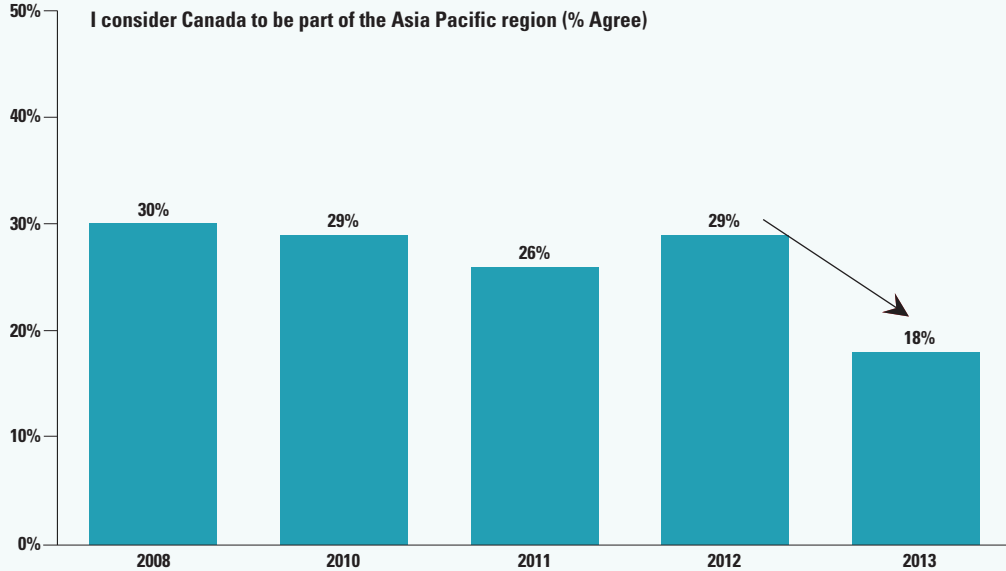
Q.1: Please rate your feelings towards some countries or regions, with ten meaning a very warm, favourable feeling, one meaning a very cold, unfavourable feeling, and five meaning not particularly warm or cold. You can use any number from one to ten: the higher the number the more favourable your feelings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

Canadians are less likely to put Canada in Asia Pacific region

In this year's poll, Canadians were much less likely to consider Canada part of the Asia Pacific region than at any time in the past 5 years. While 18% agree that Canada is an Asia Pacific country, this is a statistically significant 11-point

drop from their views just 12 months ago (29% in 2012). And, 68% resist the idea that Canada is part of the Asia Pacific, a dramatic 14-point rise from 2012.

Canada as Part of the Asia Pacific Region



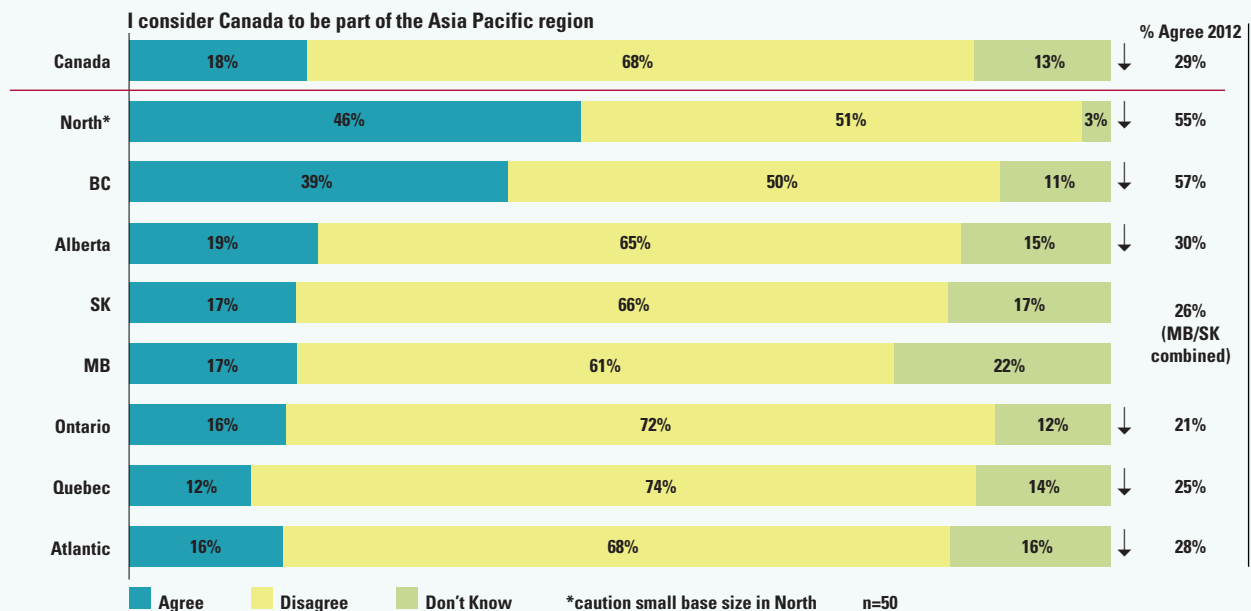
Base: All respondents: 2008 (n=1,058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129), 2013 (n=3474)

Q.2: Do you agree or disagree with the following statement: "I consider Canada to be part of the Asia Pacific region"?

British Columbians (39%) and Northern Canadians (46%) remain most likely to consider Canada an Asia Pacific nation; less than 1-in-5 elsewhere share this sentiment (the

lowest percentage in Quebec – 12%). However, even in these two regions, far fewer people hold this view in 2013 than was the case in 2012 (BC – 57%, North – 55%).

Canada and the Asia Pacific Region by Provincial Breakdown



Base: All respondents: 2013 (n=3474)

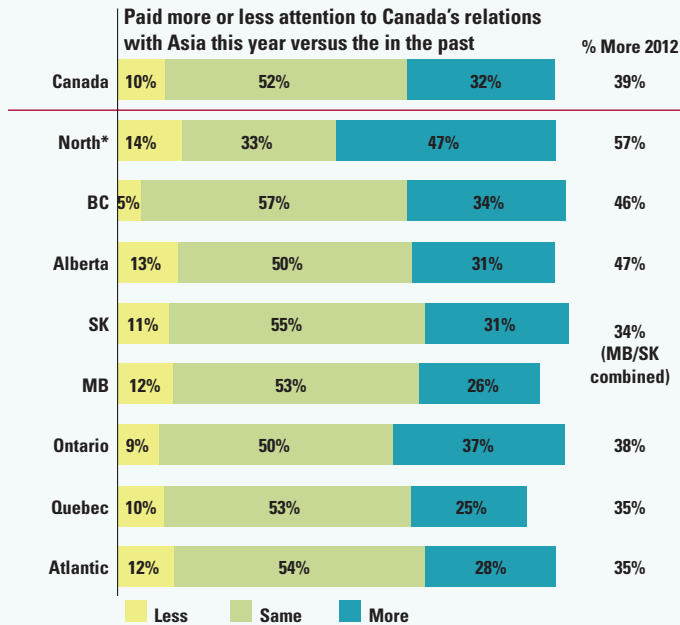
Q.2: Do you agree or disagree with the following statement: "I consider Canada to be part of the Asia Pacific region"?

Paying more or less attention to Asia?

Asia continues to be on the minds of Canadians. A third of the Canadian population say they paid “more attention” to Canada’s relations with Asia than they did in the previous

year; just over half engaged at about the same level as 12 months ago. This finding builds upon results in 2012 that showed 39% of Canadians were increasingly focused on Asia.

Paying More or Less Attention to Asia?



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

Base: All respondents (n=3474)

Q.5: 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?

*caution small base size in North n=50

Across the country, Ontario, British Columbia, Alberta and northern Canadian residents were those most likely to have paid more attention to Canada’s relations with Asia in the past 12 months, in notable comparison to Quebecers.

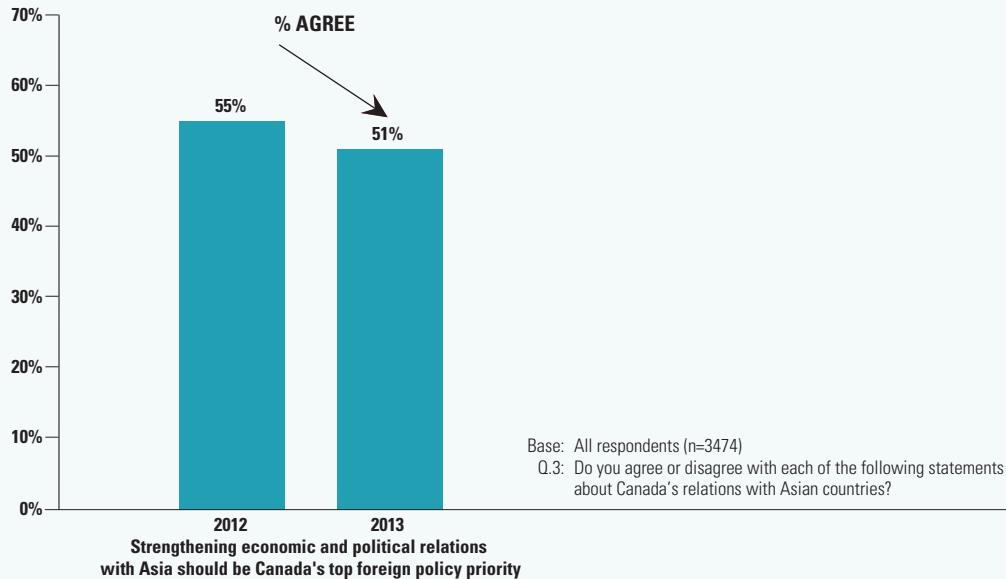
Older Canadians (55+), those with post-secondary credentials, and with connections to Asia (either through birth, heritage, work or travel) are most likely to have paid more attention to Canada-Asia relations in the past 12 months.

Asia as an important foreign policy priority

Most Canadians recognize the importance of economic and political relations with Asia, and believe this should be a top foreign policy priority for Canada. However, there has been a

4-point drop in this sentiment since the last survey of Canadian public opinion.

Economic and Political Relations with Asia is an Important Policy Priority



As in 2012, Albertans are those most likely to see relations with Asia as a top foreign policy priority for Canada. Older Canadians (55+), people with post-secondary credentials, and those who have a connection with Asia, such as

having worked or traveled there or being of Asia heritage, stand out as holding more positive views of Asia as a foreign policy priority.

Asia as a Top Foreign Policy Priority by Provincial Breakdown

		NORTH	BC	AB	SK	MB	ON	PQ	ATL
Strengthening economic and political relations with Asia should be Canada's top foreign policy priority	% Agree	54%	54%	60%	55%	47%	52%	45%	45%
	% Disagree	43%	36%	28%	33%	38%	37%	35%	39%

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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

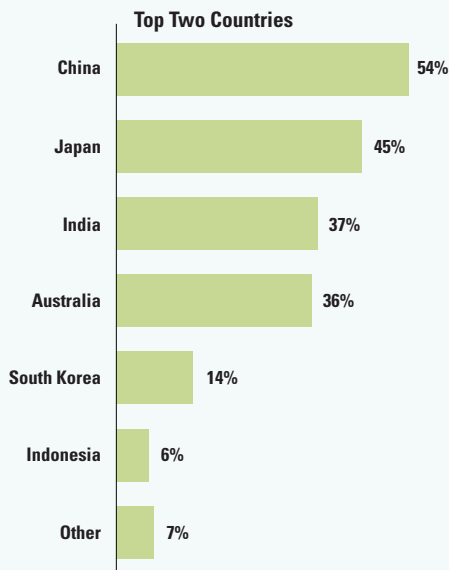
Q.3: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries?

China and Japan top Asian countries for Canada's foreign relations

China and Japan top the list of Asian countries Canadians feel Canada should place the greatest emphasis on in its foreign relations with the region. India and Australia occupy

a second tier of countries. Far fewer think Canada should give top attention to South Korea or Indonesia.

Foreign Relations Should Focus on China and Japan



Base: All respondents (n=3474)

Q.4: Which two of the following countries in Asia do you think Canada should place the greatest emphasis on in our foreign relations with the region?

Alberta residents prioritize emphasizing foreign relations with China. British Columbia and Ontario feel the focus should be on India. Northern Canadians are those most likely to choose Australia or Indonesia.

China tops the list for Canadians under 40 years of age, those with post-secondary credentials, and living in urban centres across the country.

Emphasis on Foreign Relations by Provincial Breakdown

	TOP TWO COUNTRIES							
	NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
China	39%	55%	64%	58%	47%	53%	54%	51%
Japan	51%	44%	46%	47%	50%	42%	47%	52%
India	22%	45%	33%	36%	31%	41%	33%	31%
Australia	63%	29%	35%	34%	42%	37%	36%	42%
South Korea	2%	14%	12%	15%	17%	14%	14%	13%
Indonesia	15%	8%	3%	5%	7%	5%	6%	4%
Other	8%	5%	6%	5%	7%	7%	9%	8%

○ Denotes statistically significant differences among provinces

*caution small base size in North n=50

Base: All respondents (n=3474)

Q.4: Which two of the following countries in Asia do you think Canada should place the greatest emphasis on in our foreign relations with the region?

SECTION 2:

CANADA-ASIA ECONOMIC RELATIONS

Key Findings

- While Canadians continue to rate the United States as the most important country for Canada's prosperity (75%), the importance of Asian countries has grown in their minds over the past 12 months.
- A majority of Canadians continue to believe that the growing importance of India as an economic power remains an opportunity for Canada rather than a threat; and they share similar views about China.
- A majority of Canadians feel Canada would benefit from more Asian investment in Canada, but support has weakened over the past year. While most would like to see government action to facilitate trade and investment missions to and from the region, public opinion is split on whether or not governments should use economic incentives to encourage Canadian companies to set up operations in Asia.
- While a solid majority of Canadians support entering into a free trade agreement with the European Union and Japan, public opinion is very divided on pursuing these agreements with South Korea, Southeast Asia, India or China. Opposition to free trade deals with China and India has increased over the past year.
- Most Canadians do not support direct investment in Canada by state-owned foreign companies. In particular, there is opposition to deals in which companies controlled by governments in Japan, India or China would seek to buy a controlling stake in a Canadian company. There is far less resistance to state-owned companies from Great Britain or Norway.
- A solid majority of Canadians do not agree that Canada should allow more foreign temporary workers into the country to help ease labour shortages. A majority of the Canadian population also want the Canadian government to do more to attract high-level Asian professionals to Canada.

US still the top country for Canadian prosperity, but Asian countries increasingly seen as important

While Canadians continue to rate the United States as the most important country for Canada's prosperity (75%), the importance of Asian countries has grown over the past 12 months in their minds. China remains the most important

country in Asia (45% – 1 point down from 2012). Ratings increased for India (up 12 points), Japan (up 7 points), South Korea (up 5 points), and Southeast Asia (up 3 points). The European Union has also risen in importance (up 10 points).

U.S. Still Ranks Highest in Importance for Canada's Prosperity

2008	2010	2011	2012	LOW IMPORTANCE (% of 1-2 on a scale of 7)			HIGH IMPORTANCE (% of 6-7 on a scale of 7)		2012	2011	2010	2008
3%	2%	2%	3%		2%	United States	75%		75%	77%	80%	80%
4%	8%	8%	8%		7%	China	45%		46%	44%	44%	60%
5%	5%	7%	9%	↓	5%	European Union	42%	↑	32%	35%	38%	40%
NA	NA	NA	NA		4%	United Kingdom	34%		NA	NA	NA	NA
6%	8%	8%	10%	↓	6%	Japan	33%	↑	26%	25%	28%	39%
12%	18%	19%	23%	↓	11%	India	28%	↑	16%	16%	16%	31%
NA	NA	14%	19%	↓	10%	Mexico	23%	↑	18%	18%	NA	NA
NA	NA	19%	26%	↓	11%	Brazil	17%	↑	10%	9%	NA	NA
17%	24%	24%	30%	↓	14%	South Korea	15%	↑	10%	8%	8%	18%
12%	18%	18%	25%	↓	11%	Southeast Asia	15%	↑	12%	13%	12%	28%

Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129), 2013 (n=3474)
Q.6: How important are each of these countries or regions to Canada's prosperity?

British Columbia and Alberta residents are those most likely to view China as important to Canada's prosperity. Quebec-

ers are more likely than other Canadians to see the European Union as an important region for Canadian prosperity.

Western Canada Rank China Higher in Importance for Canada's Prosperity

	HIGH IMPORTANCE (% of 6-7 on a scale of 7)							
	NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
United States	85%	80%	73%	74%	76%	76%	75%	69%
China	42%	52%	50%	45%	41%	45%	41%	39%
European Union	32%	39%	30%	38%	40%	43%	47%	38%
United Kingdom	32%	36%	29%	34%	35%	36%	30%	39%
Japan	39%	33%	33%	36%	37%	32%	35%	33%
India	31%	33%	27%	30%	24%	29%	27%	20%
Mexico	22%	23%	18%	22%	27%	22%	29%	16%
Brazil	22%	13%	12%	16%	16%	17%	20%	14%
South Korea	17%	18%	14%	15%	16%	15%	13%	12%
Southeast Asia	19%	15%	15%	14%	15%	17%	15%	13%

○ Denotes statistically significant differences among provinces

*caution small base size in North n=50

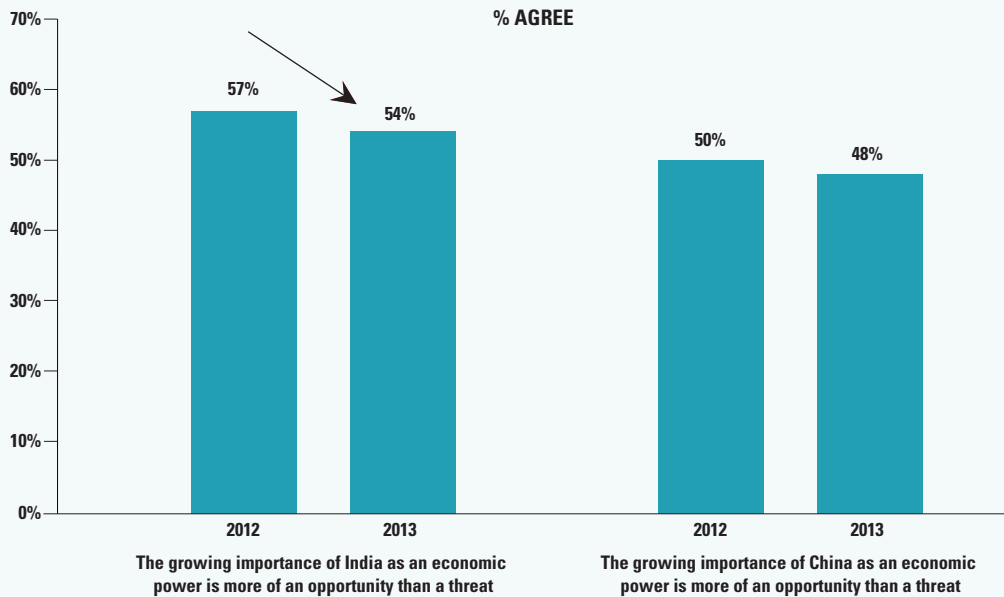
Base: All respondents: 2013 (n=3474)

Q.6: How important are each of these countries or regions to Canada's prosperity?

Economically strong China and India still seen as opportunity for Canada rather than a threat

Canadians still believe the growing importance of India as an economic power remains an opportunity for Canada rather than a threat; and they share similar views about China.

China and India as Economic Opportunities for Canada



Base: All respondents: 2012 (n=3219), 2013 (n=3474)

Q.3: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries.

British Columbia and Saskatchewan residents are more likely than other Canadians to see India in this light, while

Canadians from most regions across Canada perceive China this way (though fewer in the Atlantic provinces do so).

China and India as Economic Opportunities for Canada, Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
The growing importance of India as an economic power is more of an opportunity than a threat	% Agree	45%	61%	56%	58%	48%	56%	50%	47%
	% Disagree	32%	30%	29%	30%	33%	32%	32%	34%
The growing importance of China as an economic power is more of an opportunity than a threat	% Agree	54%	48%	54%	50%	43%	48%	47%	36%
	% Disagree	42%	45%	37%	40%	42%	45%	40%	46%

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*caution small base size in North n=50

Base: All respondents: (n=3474)

Q.3: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries?

Canadians view trade/investment with Asia positively, but many have reservations

Half of Canadians think Canada would benefit from more Asian investment, but close to 4-in-10 are not convinced. Most (close to 6-in-10) support Canadian government action to facilitate trade and investment missions to and from the region. However, public opinion is split on whether or not economic incentives should be used by government to encourage Canadian companies to set up operations in Asia (44% for, 43% against).

These same views are shared across all regions of Canada, though British Columbians are more likely to disagree that Canada would benefit from Asian investment, and they express greater resistance to the Canadian government facilitating trade missions for Asian companies to visit Canada.

Canadians Support Facilitating Trade and Investment with Asian Countries



Base: All respondents (n=3474)

Q.7: Do you agree or disagree with each of the following statements on Canada's economic relations with Asia?

British Columbians Are Less Eager to Facilitate Trade and Investment

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
The Canadian government should do more to facilitate trade and investment missions for Canadian companies to visit Asian countries	% Agree	67%	59%	61%	62%	60%	62%	53%	51%
	% Disagree	26%	31%	25%	27%	23%	27%	28%	35%
The Canadian government should do more to facilitate trade and investment missions for Asian companies to visit Canada	% Agree	53%	52%	56%	54%	59%	58%	54%	51%
	% Disagree	37%	38%	33%	34%	27%	32%	28%	34%
Canada would benefit from more Asian investment in the country	% Agree	51%	47%	49%	48%	46%	50%	53%	45%
	% Disagree	42%	47%	36%	36%	38%	40%	27%	39%
Canada should provide economic incentives to encourage more Canadian companies to set up operations Asia	% Agree	47%	44%	45%	43%	43%	43%	50%	36%
	% Disagree	50%	46%	42%	44%	41%	47%	32%	51%

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*caution small base size in North n=50

Base: All respondents (n=3474)

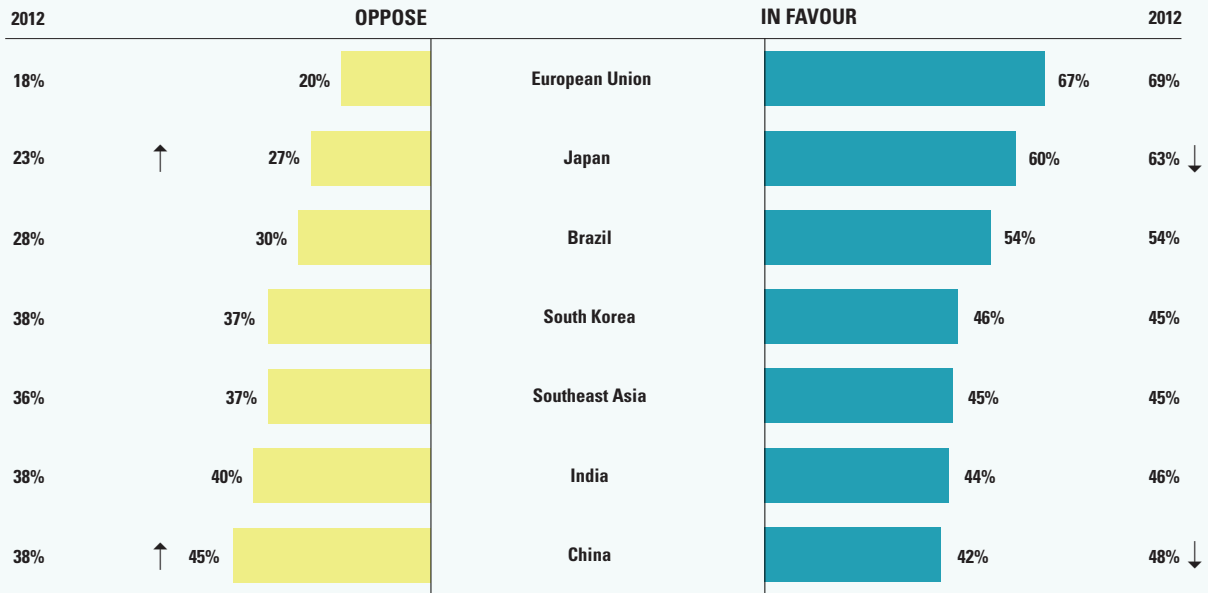
Q.7: Do you agree or disagree with each of the following statements on Canada's economic relations with Asia?

Canadians are hesitant to embrace free trade agreements with most Asian countries

While a solid majority of Canadians support entering into a free trade agreement with the European Union and Japan, public opinion is divided on pursuing these agreements with

South Korea, Southeast Asia, India, or China. Opposition to free trade deals with China and Japan has increased over the past year.

Canadians are Divided About Entering Free Trade Agreement with Asian Countries



Base: All respondents: 2012 (n=3219), 2013 (n=3474)

Q.10: 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)

Alberta residents are among the strongest supporters of free trade agreements with all countries, but notably with China, Japan, and Southeast Asia. On the other hand, opposition to

free trade with Japan is strongest in Ontario, Quebec, and the North.

Views on Free Trade Agreements by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
European Union	% In favour	59%	70%	72%	68%	65%	65%	67%	64%
	% Opposed	34%	19%	17%	19%	19%	24%	17%	19%
Japan	% In favour	49%	67%	67%	66%	61%	60%	52%	58%
	% Opposed	45%	22%	21%	22%	22%	28%	30%	26%
Brazil	% In favour	58%	57%	63%	56%	55%	54%	49%	51%
	% Opposed	34%	28%	23%	29%	25%	32%	30%	31%
South Korea	% In favour	42%	53%	53%	53%	46%	49%	37%	40%
	% Opposed	37%	33%	35%	33%	37%	37%	40%	42%
Southeast Asia	% In favour	45%	50%	58%	50%	49%	46%	37%	46%
	% Opposed	48%	37%	28%	36%	33%	38%	39%	38%
India	% In favour	54%	48%	49%	47%	48%	45%	37%	43%
	% Opposed	41%	39%	38%	40%	34%	41%	41%	39%
China	% In favour	40%	43%	51%	46%	46%	42%	37%	42%
	% Opposed	54%	46%	39%	41%	37%	48%	44%	43%

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*caution small base size in North n=50

Base: All respondents (n=3474)

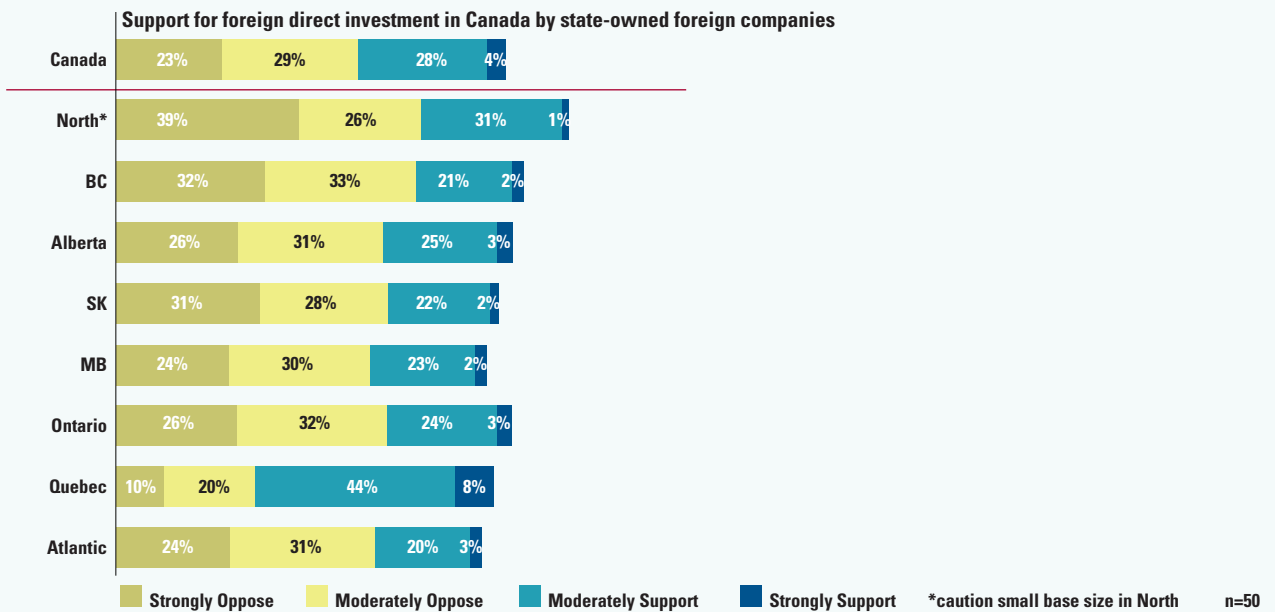
Q.10: Do you support or oppose Canada entering into a Free Trade Agreement with each of the following countries or regions (select support/oppose for each of the countries)

Canadians oppose state-owned foreign direct investment, particularly from Asia

Most Canadians do not support direct investment in Canada by state-owned foreign companies. In particular, there is strong opposition – 6-in-10 or more – to deals in which companies controlled by governments in Japan, India, or China would seek to buy a controlling stake in a Canadian

company. There is far less resistance to state-owned companies from Great Britain or Norway. British Columbians and those living in the North are most likely to oppose foreign direct investment, while those residing in Quebec are much more likely to support it.

Many Oppose Foreign Direct Investment in Canada

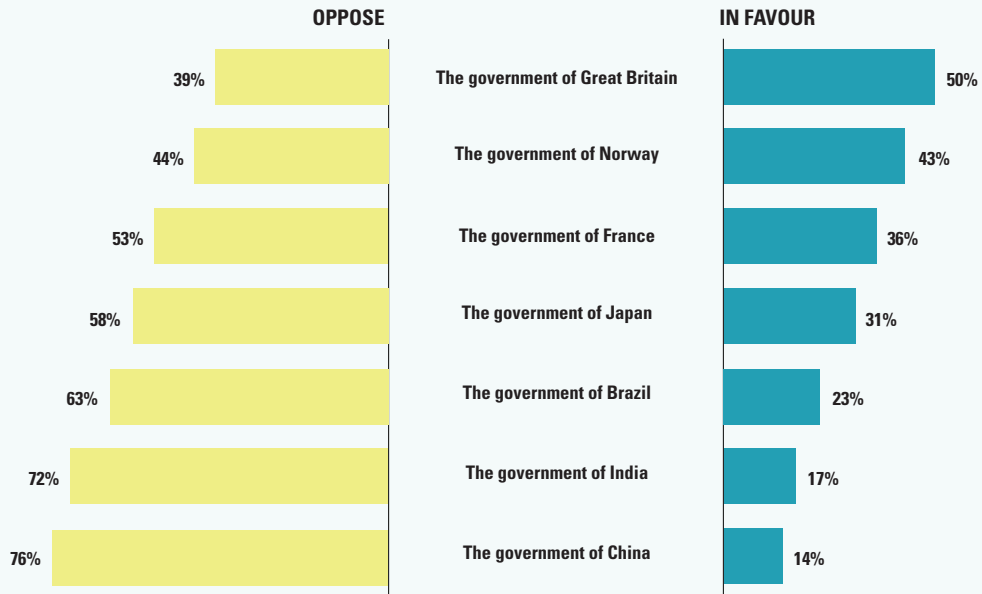


Base: All respondents (n=3474)

Q.8: Do you support or oppose foreign direct investment in Canada by state-owned foreign companies?

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

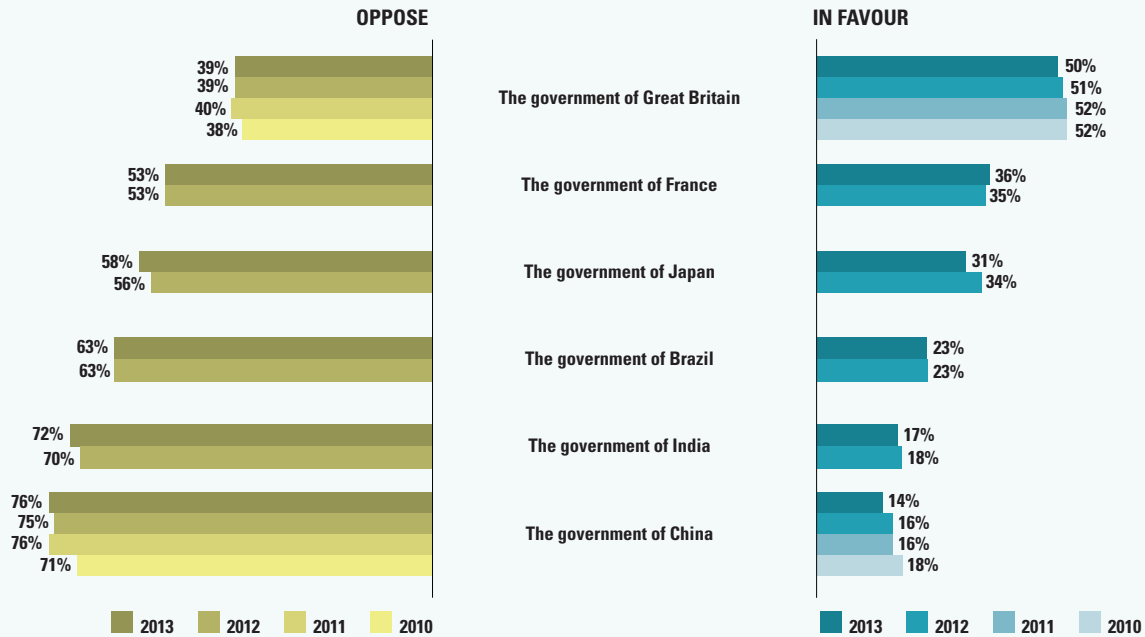
Canadians Are Wary of State-Controlled Foreign Enterprises Controlling Canadian Companies



Base: All respondents (n=3474)

Q.9: 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)

Shifts in Canadian Views of State-Controlled Foreign Enterprises Controlling Canadian Companies, 2010-2013

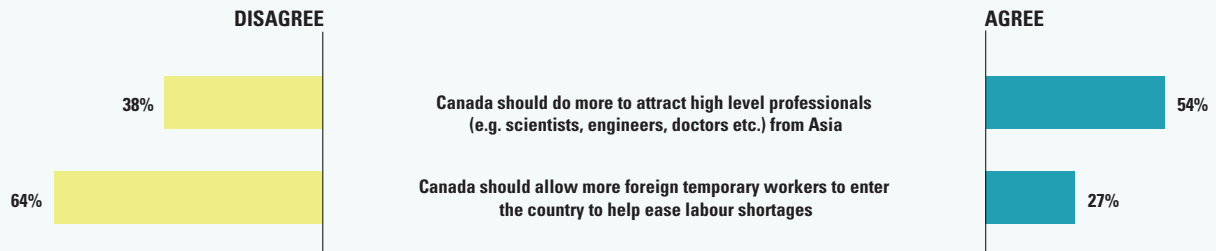


Base: All respondents: 2010 (n=2903), 2011 (n=2926), 2012 (n=3129), 2013 (n=3474)

Q.9: 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)

Canadians are unsure about facilitating Asian entry into Canada’s labour market

Canadian Views on Facilitating Asian Entry into Canada’s Labour Market



Base: All respondents (n=3474)
Q.7: Do you agree or disagree with each of the following statements on Canada’s economic relations with Asia?

While a majority of the Canadian population wants the Canadian government to do more to attract high level Asian professionals to Canada, 4-in-10 disagree. Two-thirds

Canadians do not agree that Canada should allow more foreign temporary workers into the country to help ease labour shortages.

British Columbia, Ontario, and Atlantic province residents are most opposed to allowing more temporary workers into Canada.

Provincial Attitudes to Facilitating Asian Entry into Canada’s Labour Market

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Canada should do more to attract high level professionals (e.g. scientists, engineers, doctors etc.) from Asia	% Agree	54%	51%	52%	57%	51%	53%	57%	47%
	% Disagree	43%	42%	37%	33%	36%	41%	30%	41%
Canada should allow more foreign temporary workers to enter the country to help ease labour shortages	% Agree	33%	20%	33%	34%	26%	24%	35%	19%
	% Disagree	64%	75%	59%	57%	61%	68%	52%	70%

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*caution small base size in North n=50

Base: All respondents (n=3474)

Q.7: Do you agree or disagree with each of the following statements on Canada’s economic relations with Asia?

SECTION 3:

PERSPECTIVES ON PROVINCIAL RELATIONS WITH ASIA

Key Findings

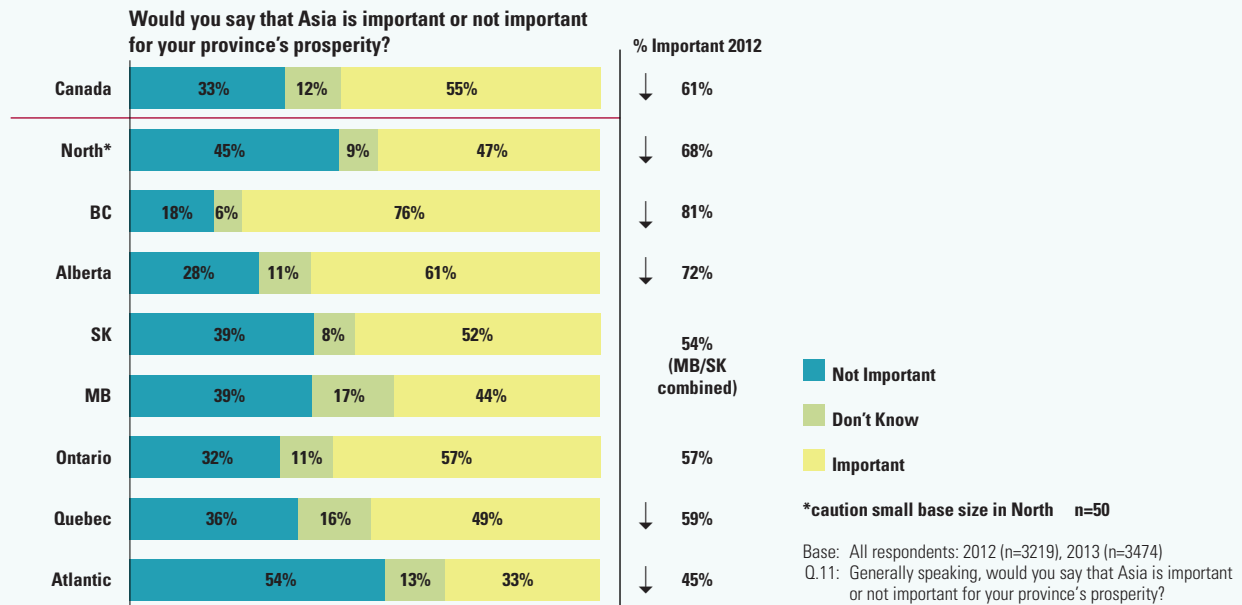
- Over half (55%) of Canadians believe Asia is important to their province's prosperity, but fewer do so than was the case a year ago (down 6 points). British Columbians (76%), Albertans (61%), and Ontarians (57%) are more likely than those in other provinces to view Asia as being important to their prosperity. However, there has been a general decline across most regions in the economic importance attributed to Asia.
- Canadians are opposed to their provincial government giving priority to investment from Asian countries (59% oppose). A slim majority (53%) back the idea of opening a provincial trade office in Asia.
- More than 70% of Canadians think their provincial governments should encourage more cultural exchanges with Asia through performing arts and other exhibitions as a way of building stronger ties with Asia. Close to 6-in-10 think their province should increase the number of student exchange and university agreements between their province and Asia. And, half support the idea of teaching more about Asian history and culture in the province's schools, up 8 points from 2012 when 42% felt it was an important provincial government action.
- Canadians across the country strongly oppose having their province's schools place more emphasis on teaching Asian languages.

Majority continue to see Asia as important to their province's prosperity, but there is a decline from a year ago

Over half (55%) of Canadians believe Asia is important to their province's prosperity, but fewer do so in 2013 than a year ago (down 6 points). British Columbians (76%), Albertans (61%), and Ontarians (57%) are more likely than those in other provinces to view Asia as being important to

their prosperity. However, there has been a general decline across most regions in the economic importance attributed to Asia, notably in the North (down 21 points), Alberta (down 11 points), Quebec (down 10 points) and Atlantic Canada (down 12 points).

Importance of Asia to Province's Prosperity: Regional Differences

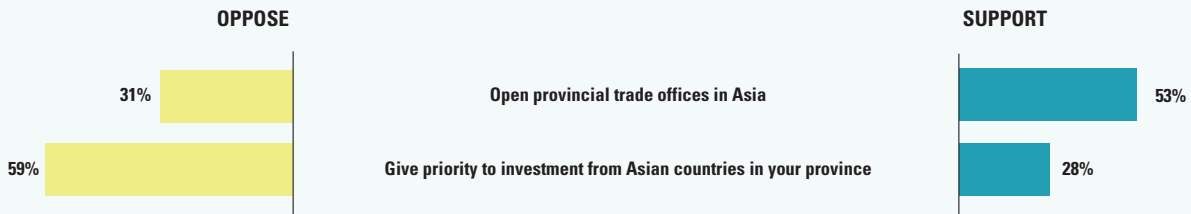


Canadian attitudes to provincial government actions on trade and investment

Canadians are strongly opposed to their provincial government giving priority to investment from Asian countries (59% oppose). And, only a slim majority (53%) back the idea of opening a provincial trade office in Asia.

These sentiments are shared almost equally across the various provinces, with a few standouts. Atlantic Canadians are those most opposed to opening a provincial trade office in Asia (39%). Quebec residents are those most supportive of giving priority to Asian investment in their province (35%).

Canadians Are Supportive of Some Provincial Government Actions



Base: All respondents (n=3474)

Q.12: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?

Support for Provincial Government Actions on Trade and Investment by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Open provincial trade offices in Asia	% Agree	36%	58%	51%	53%	51%	57%	49%	42%
	% Disagree	40%	31%	35%	33%	31%	30%	29%	39%
Give priority to investment from Asian countries in your province	% Agree	38%	27%	26%	25%	22%	26%	35%	23%
	% Disagree	54%	65%	65%	59%	62%	63%	45%	61%

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*caution small base size in North n=50

Base: All respondents (n=3474)

Q.12: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?

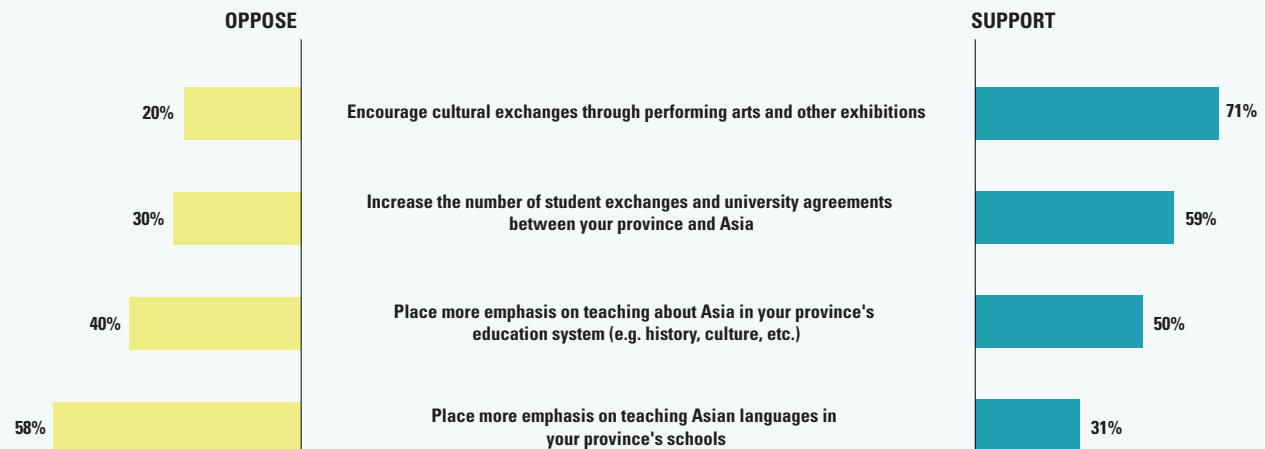
Solid support for provincial governments using cultural / student exchanges to build ties with Asia, but resistance to teaching Asian languages in schools

More than 70% of Canadians think their provincial governments should encourage more cultural exchanges with Asia through performing arts and other exhibitions as a way of building stronger ties. Close to 6-in-10 support the idea of increasing the number of student exchange and university agreements between their province and Asia. And, half support teaching more about Asian history and culture in the province's schools, up 8 points from 2012 when 42% felt it was an important provincial government action.

However, there is strong opposition (58%) to having their province's schools place more emphasis on teaching Asian languages.

Canadians with post-secondary education are generally more in favour of initiatives to build stronger ties with Asia, such as having schools teach about Asia (63%), placing more emphasis on teaching Asian languages (44%) and increasing the number of student exchanges with Asian universities (74%).

Canadians are Supportive of Some Provincial Government Actions



Base: All respondents (n=3474)

Q.12: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?

Canadian attitudes toward provincial government actions on cultural exchange and Asia competency

Regionally, British Columbian residents express the strongest support for their provincial government undertaking cultural and other initiatives to build stronger ties with Asia, including teaching about Asia (62%) and teaching Asian languages (43%). Saskatchewan residents are those most opposed to placing more emphasis on teaching Asian languages (65% opposed).

Support for Provincial Government Actions by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Encourage cultural exchanges through performing arts and other exhibitions	% Agree	65%	79%	65%	64%	67%	75%	66%	65%
	% Disagree	26%	16%	26%	27%	21%	18%	21%	21%
Increase the number of student exchanges and university agreements between your province and Asia	% Agree	66%	66%	56%	52%	59%	60%	58%	56%
	% Disagree	26%	26%	33%	38%	31%	31%	27%	30%
Place more emphasis on teaching about Asia in your province's education system (e.g. history, culture, etc.)	% Agree	61%	62%	51%	53%	47%	53%	37%	48%
	% Disagree	32%	34%	40%	36%	42%	39%	45%	38%
Place more emphasis on teaching Asian languages in your province's schools	% Agree	28%	43%	36%	25%	27%	31%	26%	29%
	% Disagree	53%	51%	55%	65%	60%	61%	58%	57%

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*caution small base size in North n=50

Base: All respondents (n=3474)

Q.12: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia?

SECTION 4:

VIEWS OF CANADA-ASIA RELATIONS ON ENERGY ISSUES

Key Findings

- While many Canadians support building pipelines to transport natural gas or crude oil to ports on Canada's west coast for export to Asia, a sizable minority oppose the idea. There is a lack of consensus in Canadian public opinion on allowing tankers carrying liquefied natural gas or crude oil to enter the waters off Canada's west coast.
- A slim majority of Canadians feel the potential risks to the environment of transporting oil and gas to Asia outweigh the potential economic benefits of doing so, but a full third disagree. The vast majority of Canadians want the Canadian government to promote Canada as a leader in clean energy technology.
- While a slim majority of Canadians continue to express a sense of urgency to take advantage of Asian countries' need for energy resources, there has been a significant decline over the past 12 months in the percentage who hold this view. Further, Canadians feel more inclined in 2013 to want to proceed cautiously with Asia when it comes to energy (up 6 points from 2012), and prefer to focus more on the relationship with the United States.
- Canadian public opinion is split when it comes to giving First Nations communities a prominent role in decisions related to the development of energy resources for export to Asia.

Canadians are divided on building new pipelines and allowing tankers to enter west coast waters

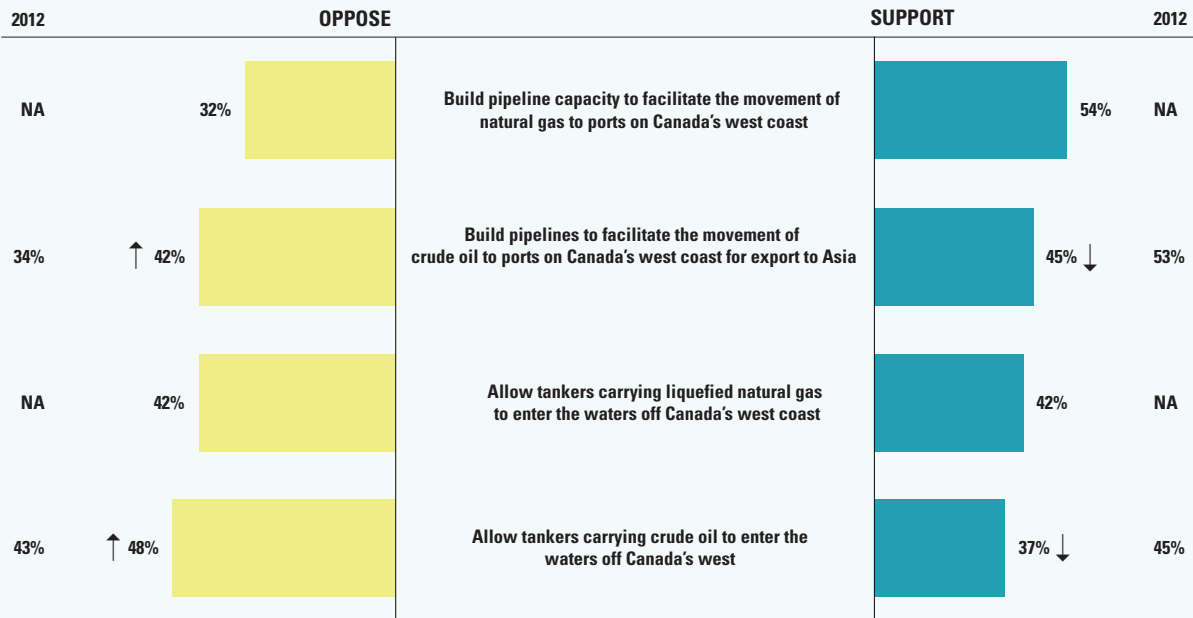
While most Canadians support building pipelines to transport natural gas (54%) or crude oil (45%) to ports on Canada's west coast for export to Asia, many are opposed to the idea (32% and 42%, respectively). Moreover, support for the construction of pipelines for transporting crude oil has dropped 8 points in the past year.

There is a similar lack of consensus on allowing tankers carrying liquefied natural gas or crude oil to enter the waters

off Canada's west coast. Support for allowing tankers carrying crude oil has also dropped 8 points in the past 12 months.

British Columbians and Northern Canadians are among the strongest opponents of pipelines and tankers carrying either natural gas or crude oil for export to Asia, while Albertans are their strongest supporters.

Canadians Are Divided with Respect to the Transport of Energy Resources



Base: All respondents: 2012 (n=3219), 2013 (n=3474)
Q.13: Would you support or oppose the Canadian government taking each of the following actions for pursuing opportunities with Asian countries in the energy sector?

Provinces Are Divided with Respect to the Transport of Energy Resources

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Build pipeline capacity to facilitate the movement of natural gas to ports on Canada's west coast	% Agree	45%	49%	69%	56%	53%	55%	49%	54%
	% Disagree	53%	43%	21%	30%	31%	33%	31%	32%
Build pipelines to facilitate the movement of crude oil to ports on Canada's west coast for export to Asia	% Agree	44%	34%	67%	53%	47%	46%	40%	40%
	% Disagree	54%	60%	23%	33%	37%	43%	39%	44%
Allow tankers carrying liquefied natural gas to enter the waters off Canada's west coast	% Agree	26%	45%	54%	46%	39%	39%	42%	37%
	% Disagree	59%	47%	32%	37%	44%	47%	36%	45%
Allow tankers carrying crude oil to enter the waters off Canada's west coast	% Agree	33%	30%	52%	42%	40%	35%	39%	34%
	% Disagree	52%	65%	34%	41%	44%	52%	41%	50%

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* caution small base size in North n=50

Base: All respondents (n=3474)

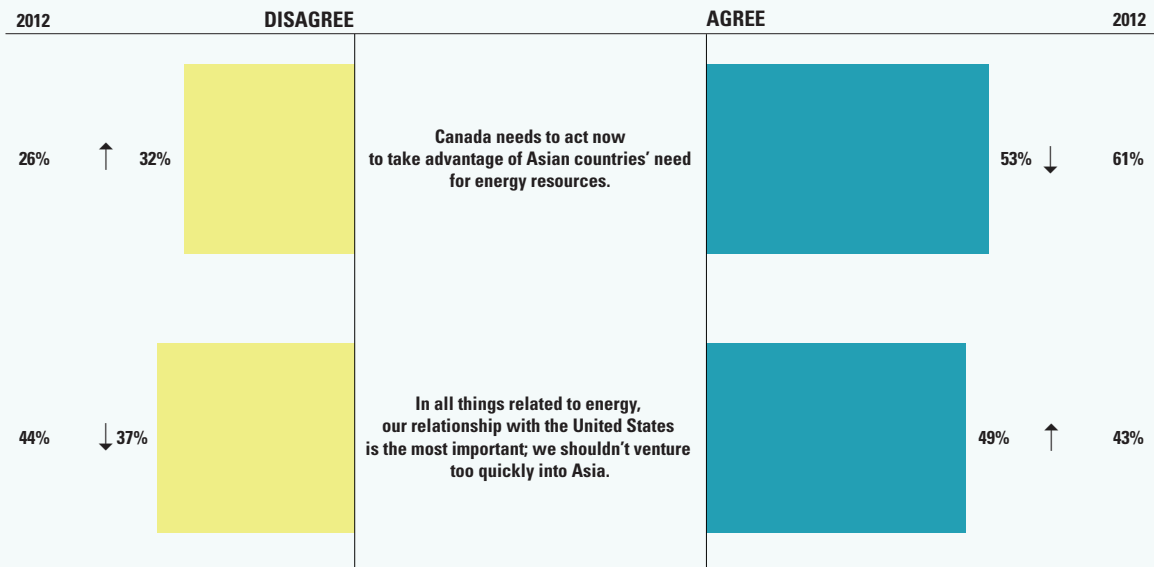
Q.13: Would you support or oppose the Canadian government taking each of the following actions for pursuing opportunities with Asian countries in the energy sector?

Sense of urgency to pursue energy relations with Asia drops

While a slim majority of Canadians continues to express a sense of urgency to take advantage of Asian countries' need for energy resources, there has been an 8-point drop in this view over the past 12 months. Albertans feel a greater sense of urgency on Canada-Asia energy relations than Canadians living elsewhere.

Further, Canadians feel more inclined in 2013 to want to proceed cautiously with Asia when it comes to energy (up 6 points since 2012), and instead focus more on the relationship with the United States. Quebeckers hold the strongest views in this regard.

Canadians Willing to Look to Asian Markets to Export Energy Resources, While Keeping the Needs of the US in Mind



Base: All respondents: 2012 (n=3219), 2013 (n=3474)

Q.14: Please indicate whether you agree or disagree with each of the following statements about Canada's relations with Asian countries in the energy.

Energy-Endowed Alberta is More Keen to Meet Asian Demand

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Canada needs to act now to take advantage of Asian countries' need for energy resources.	% Agree	51%	56%	66%	56%	51%	52%	49%	48%
	% Disagree	45%	34%	22%	29%	27%	35%	31%	31%
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	57%	42%	42%	44%	44%	50%	56%	49%
	% Disagree	39%	46%	48%	41%	37%	39%	26%	32%

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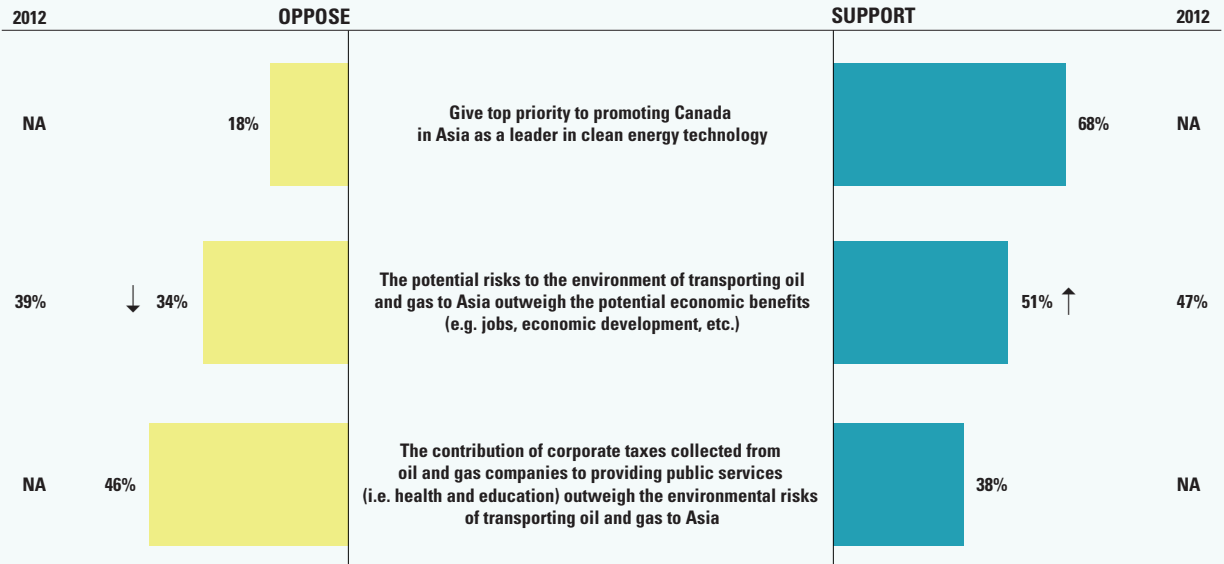
*caution small base size in North n=50

Base: All respondents (n=3474)

Q14: Please indicate whether you agree or disagree with each of the following statements about Canada's relations with Asian countries in the energy sector.

Canadians question whether economic benefits of transporting oil/gas outweigh environmental risks

Environmental Risks vs. Economic Benefits



Base: All respondents: 2012 (n=3219), 2013 (n=3474)

Q.13: Would you support or oppose the Canadian government taking each of the following actions for pursuing opportunities with Asian countries in the energy sector?

Environmental Risks vs. Economic Benefits by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Give top priority to promoting Canada in Asia as a leader in clean energy technology	% Agree	71%	74%	74%	67%	71%	72%	56%	64%
	% Disagree	23%	15%	12%	18%	14%	17%	23%	18%
The potential risks to the environment of transporting oil and gas from Canada to Asia outweigh the potential economic benefits.	% Agree	54%	56%	40%	36%	47%	53%	54%	46%
	% Disagree	25%	36%	49%	43%	34%	34%	26%	35%
The contribution of corporate taxes collected from oil and gas companies to providing public services (i.e. health and education) outweigh the environmental risks of transporting oil and gas to Asia	% Agree	34%	36%	46%	42%	40%	38%	34%	33%
	% Disagree	57%	54%	38%	37%	38%	47%	45%	48%

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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

Q14: 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 slight majority of Canadians feel the potential risks to the environment of transporting oil and gas to Asia outweigh the potential economic benefits of doing so, but a full third disagree with this assertion.

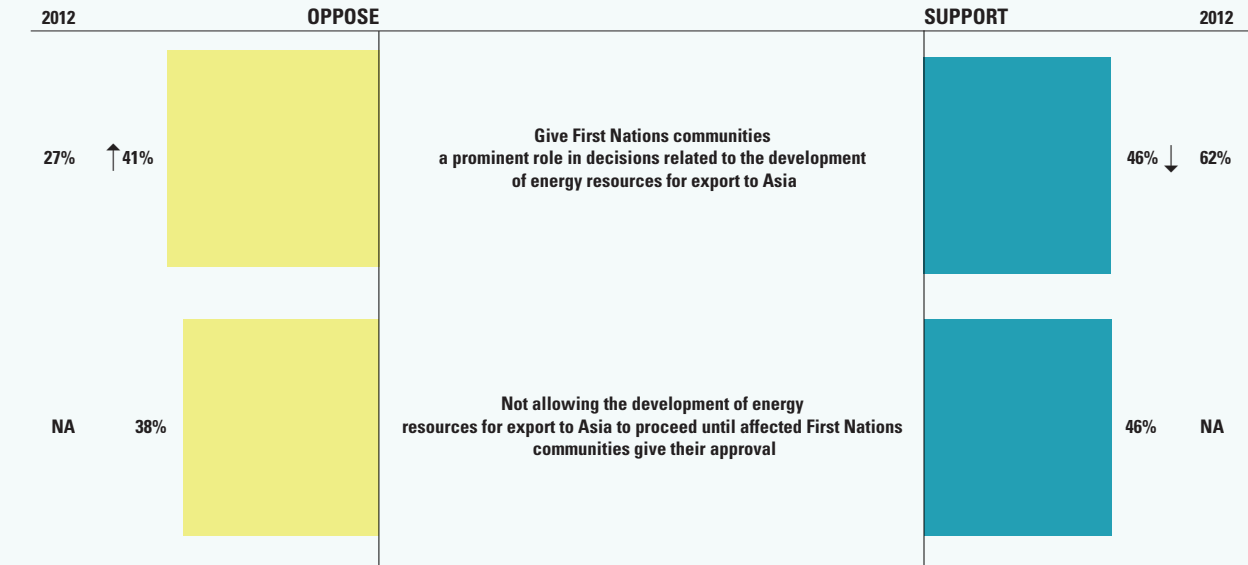
Further, close to half of the Canadian population do not believe that corporate taxes collected from oil and gas companies to provide public services outweigh the environmental risks. However, almost 4-in-10 do hold this view.

Alberta and Saskatchewan residents are more likely than Canadians living elsewhere to believe that environmental risks associated with energy development are mitigated by the economic or tax benefits. British Columbians are least likely to hold these views.

Nonetheless, the vast majority of Canadians want the Canadian government to promote Canada as a leader in clean energy technology. This view is held across all regions of the country.

Canadians are divided on giving First Nations communities a special role in developing energy resources

Canadians are split over how First Nations people should be involved in decisions regarding the development of energy resources



Base: All respondents: 2012 (n=3219), 2013 (n=3474)

Q.13: Would you support or oppose the Canadian government taking each of the following actions for pursuing opportunities with Asian countries in the energy sector?

Canadian public opinion is split over giving First Nations communities a prominent role in decisions related to the development of energy resources for export to Asia. In fact, support for this idea has plummeted 16 points over the past year.

Similarly, while almost 5-in-10 Canadians would not allow energy resource development for export to Asia until affected

First Nations give their approval just under 4-in-10 oppose such an idea.

Canadians in all four Western provinces are more opposed than those in other provinces to giving First Nations a special role in decisions on energy development projects. Northern Canadians, Quebecers, and Ontario residents are more supportive of the idea.

Provinces Are Divided about First Nations Involvement in Asian Energy Exports

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Give First Nations communities a prominent role in decisions related to the development of energy resources for export to Asia	% Agree	62%	46%	34%	31%	30%	49%	50%	42%
	% Disagree	32%	49%	56%	56%	53%	37%	31%	41%
Not allowing the development of energy resources for export to Asia to proceed until affected First Nations communities give their approval	% Agree	69%	44%	33%	26%	30%	52%	48%	43%
	% Disagree	25%	47%	57%	58%	51%	35%	29%	39%

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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

Q13: Would you support or oppose the Canadian government taking each of the following actions for pursuing opportunities with Asian countries in the energy sector?

SECTION 5:

PROMOTING HUMAN RIGHTS & DEMOCRACY IN ASIA

Key Findings

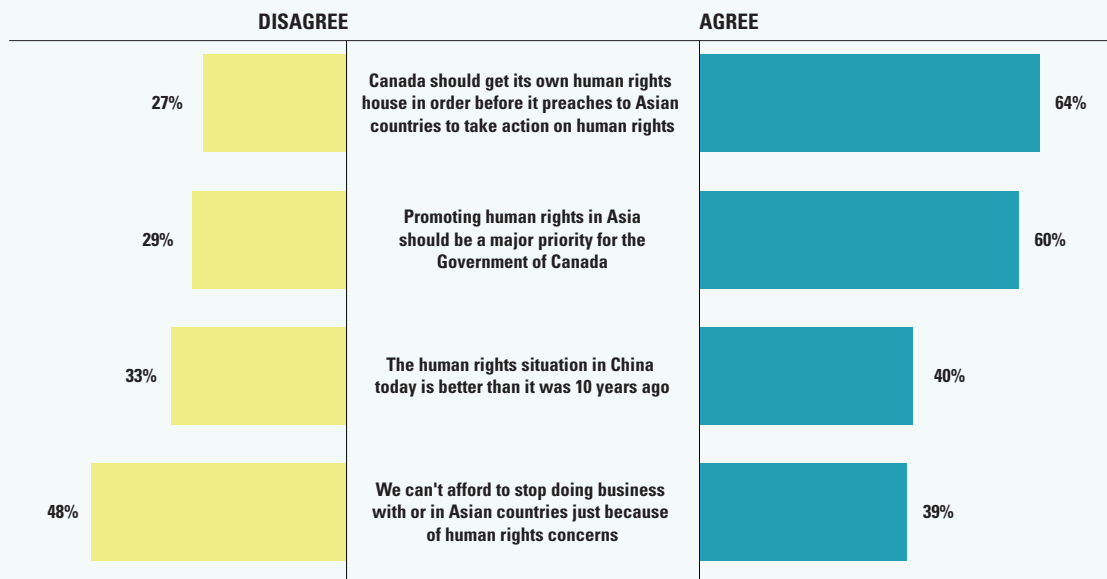
- A majority of Canadians agrees that promoting human rights and democracy should be a priority in Canada's relations with Asian countries. This view is held by an increasing number of Canadians. Still, most Canadians continue to believe that Canada should get its own human rights house in order before it preaches to Asian countries to take action on human rights.
- Canadian public opinion is fairly evenly split as to whether or not Canada should stop doing business with or in Asian countries because of human rights concerns – close to half believe human rights should trump business priorities while a slightly smaller percentage feel Canada should give priority to business.
- Canadians' perceptions of the human rights situation in China continue to worsen; 40% believe that human rights conditions in China are better than 10 years ago. This is the lowest number in five years, and the fourth consecutive decline since 2010.

Canadians continue to support action on human rights in Asia, but still feel Canada has work to do at home

A majority of Canadians agrees that promoting human rights and democracy should be a priority in Canada's relations with Asian countries. This view is held by an increasing number of Canadians (up 4 points from 56% in 2012, though still below 2011 levels – 66%). British Columbians are particularly solid in their support.

Still, most Canadians continue to believe that Canada should get its own human rights house in order before it preaches to Asian countries. This view remains substantively unchanged compared to last year (64% in 2013; 63% in 2012).

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



Base: All respondents 2013 (n=3474)

Q.15: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries in the area of human rights

Promoting Human Rights and Democracy as a Priority for Canada's Foreign Policy with Asia, 2008 to 2013



Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129), 2013 (n=3474)

Q.15: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries in the area of human rights?

Despite continued unfavourable views of China's human rights record, Canadians are pragmatic about promoting human rights and democracy in Asia

Promoting Human Rights and Democracy in Asia by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Canada should get its own human rights house in order before it preaches to Asian countries to take action on human rights	% Agree	77%	66%	58%	62%	55%	64%	65%	66%
	% Disagree	23%	30%	35%	28%	31%	29%	21%	20%
Promoting human rights in Asia should be a major priority for the Government of Canada	% Agree	58%	65%	60%	57%	53%	62%	57%	58%
	% Disagree	40%	29%	32%	33%	32%	29%	25%	29%
The human rights situation in China today is better than it was 10 years ago	% Agree	45%	41%	44%	43%	38%	41%	34%	44%
	% Disagree	28%	36%	27%	28%	29%	34%	35%	26%
We can't afford to stop doing business with or in Asian countries just because of human rights concerns	% Agree	41%	41%	44%	44%	34%	38%	41%	35%
	% Disagree	52%	53%	47%	43%	49%	53%	41%	49%

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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

Q.15: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Canadians' perceptions of the human rights situation in China continue to worsen. In 2013, 40% believe that human rights conditions in China are better than 10 years ago. This is the lowest number in four years, and the fourth consecutive decline since 2010 (47%). British Columbians, Ontarians, and Quebecers are those most critical of the human rights situation in China.

Despite this, Canadian public opinion is fairly evenly split as to whether Canada should stop doing business with or in

Asian countries because of human rights concerns – close to half believe human rights should trump business priorities while four-in-ten feel Canada should prioritize business.

Alberta and Saskatchewan residents are more supportive of doing businesses with Asian countries despite human rights concerns, while British Columbians and Ontarians are more concerned with human rights than the potential business opportunities.

SECTION 6:

DEVELOPMENT ASSISTANCE IN ASIA

Key Findings

- There is strong support for Canada providing development assistance to Asian countries, but only if it helps foster positive change in terms of adopting democratic norms, fostering good governance, or supporting Canadian trade and investment objectives in Asia. There is less of a desire to see development aid used only to foster economic growth in Asian countries.
- A majority of Canadians do not support the idea of Canadian official development assistance going to Asian countries with large and growing economies, even if they have a significant proportion of the world's poor. Just 23% support giving aid to these countries. This sentiment is shared equally across all provinces.
- A significant majority of Canadians (71%) believe that Asian countries with large and growing economies, like China and India, should themselves provide development assistance to poorer countries.
- Many Canadians don't really know whether or not Canada should start a program to give official development assistance to Myanmar. Of those who expressed a view, opinion is fairly divided.

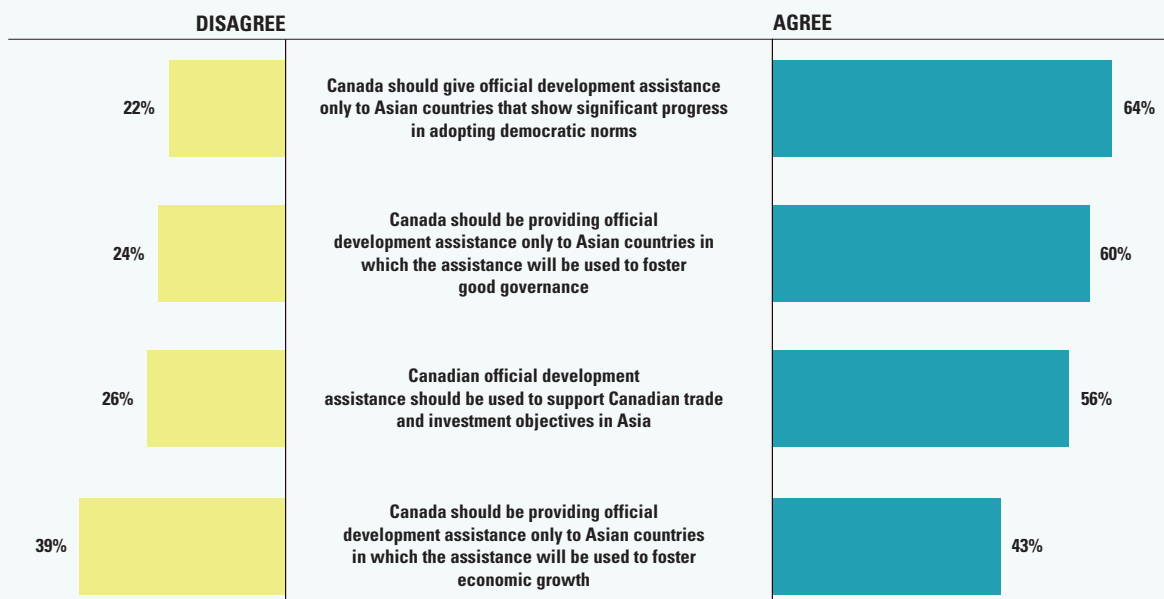
Canadians support development assistance to Asia, but with conditions

There is strong support for Canada providing development assistance to Asian countries, but with conditions. Canadians agree with development assistance, but only if it helps foster positive change in terms of adopting democratic norms (64%), fostering good governance (60%), or supporting Canadian trade and investment objectives in Asia (56%).

They are less adamant that development aid be used to foster economic growth in recipient Asian countries (43%).

British Columbians are much more inclined than other Canadians to want to see these conditions attached to development assistance.

Development Assistance Should be Given Pragmatically but Not Solely Based on Economic Goals



Base: All respondents (n=3474)

Q.16: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Conditions on Development Assistance by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Canada should give official development assistance only to Asian countries that show significant progress in adopting democratic norms	% Agree	60%	70%	62%	57%	62%	65%	63%	59%
	% Disagree	30%	20%	23%	27%	19%	22%	19%	25%
Canada should be providing official development assistance only to Asian countries in which the assistance will be used to foster good governance	% Agree	61%	67%	59%	57%	57%	63%	55%	55%
	% Disagree	28%	24%	24%	26%	20%	23%	26%	28%
Canadian official development assistance should be used to support Canadian trade and investment objectives in Asia	% Agree	63%	58%	58%	55%	59%	59%	49%	53%
	% Disagree	27%	28%	23%	27%	18%	26%	28%	24%
Canada should be providing official development assistance only to Asian countries in which the assistance will be used to foster economic growth	% Agree	42%	47%	45%	45%	47%	45%	39%	38%
	% Disagree	47%	42%	37%	39%	30%	40%	39%	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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

Q.16: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Canadians oppose providing development assistance to growing Asian economies, despite high levels of poverty in these countries

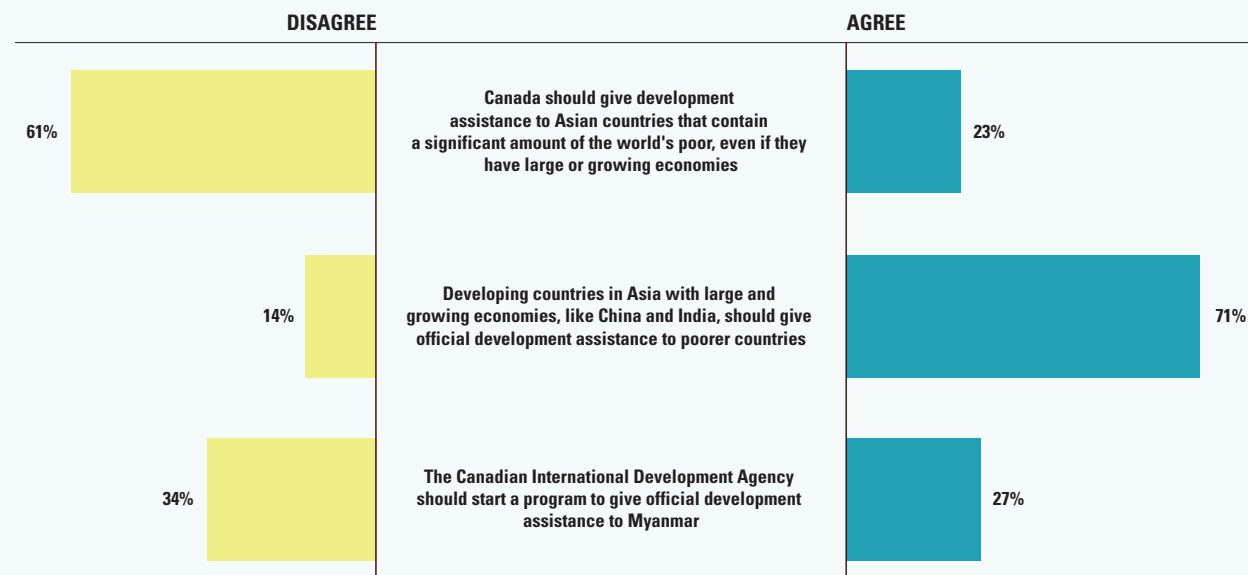
A majority of Canadians (61%) do not support the idea of Canadian official development assistance going to large and growing Asian economies, even if those countries have a significant proportion of the world's poor. Just 23% support giving aid to these countries. This sentiment is shared equally across all provinces.

Indeed, a significant majority of Canadians (71%) believes that Asian countries with large and growing economies, like

China and India, should themselves provide development assistance to poorer countries. British Columbians are particularly strong in holding this view.

Many Canadians (39%) don't really know whether or not Canada should start a program to give official development assistance to Myanmar. Of those who expressed a view, opinion was fairly evenly divided, with 27% liking the idea, and 34% opposed. Support is strongest in British Columbia.

Development Assistance Should be Given by India and China to Countries in Need



Base: All respondents (n=3474)

Q.16: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Recipients of Development Assistance by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
Canada should give development assistance to Asian countries that contain a significant amount of the world's poor, even if they have large or growing economies	% Agree	12%	23%	21%	20%	26%	24%	23%	19%
	% Disagree	65%	67%	64%	63%	54%	62%	55%	61%
Developing countries in Asia with large and growing economies should give official development assistance to poorer countries	% Agree	79%	78%	66%	69%	66%	73%	69%	69%
	% Disagree	9%	13%	15%	12%	14%	16%	13%	13%
The Canadian International Development Agency should start a program to give official development assistance to Myanmar	% Agree	16%	33%	23%	23%	23%	29%	23%	26%
	% Disagree	36%	34%	36%	32%	30%	35%	34%	33%

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 that totals do not necessarily add up to 100.

* caution small base size in North n=50

Base: All respondents (n=3474)

Q.16: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

SECTION 7:

CANADA-ASIA SECURITY ISSUES

Key Findings

- A solid majority of Canadians believe that outright military conflict between countries in the Asia Pacific is likely in the next 10 years. And, most view military conflicts in the region directly affecting Canadian security.
- A solid majority of Canadians also continue to believe that China's growing military power is a threat to the Asia Pacific region, though this is less the case than 12 months ago.
- Public opinion is very mixed about Canadian involvement in Asian security initiatives; 41% agree that Canada should increase its participation in these initiatives while 39% disagree. A slight majority support the idea of Canada taking a clear position on territorial disputes between Asian countries.
- Views on the possibility of Asian military conflict and Canadian involvement are shared equally across all provinces. Quebeckers, however, are more adamant than those living in other provinces about Canada having a clear position on territorial disputes in Asia. They are also more likely than others to disagree that military conflicts in Asia affect Canadian security interests.
- The vast majority of Canadians agree that Canada should do more to prevent cyber attacks that threaten the country's security, including a majority who "strongly agree". This sentiment is strongest among British Columbians and northern Canadians.
- A substantial majority of the Canadian population also agree that the theft of intellectual property is a serious threat to Canadians doing businesses in Asia.

Canadians believe military conflict in Asia is a distinct possibility, but are unsure of direct Canadian involvement

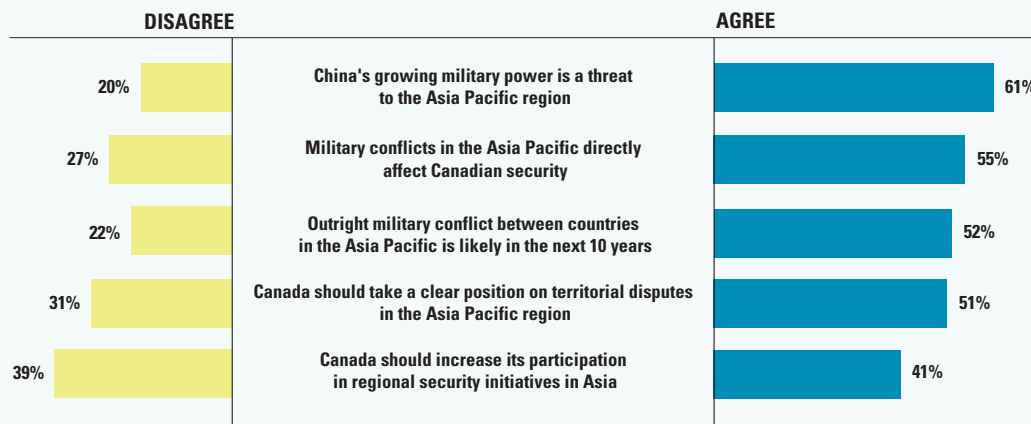
A majority of Canadians (52%) believe that outright military conflict between countries in the Asia Pacific is likely in the next 10 years. And, most (55%) view military conflicts in the region directly affecting Canadian security. A solid majority of Canadians (61%) continue to believe that China's growing military power is a threat to the Asia Pacific region. The proportion of Canadians who share this view, however, has dropped 5 points in the past 12 months.

However, public opinion is very mixed about Canadian involvement in Asian security initiatives; 41% agree that Canada should increase its participation in these initiatives

while 39% disagree. Instead, a slight majority (51%) support the idea of Canada taking a clear position on territorial disputes between Asian countries.

Views on the possibility of Asian military conflict and Canadian involvement are shared equally across all provinces. Quebeckers, however, are more adamant than those living in other provinces about Canada having a clear position on territorial disputes in Asia. They are more likely than others to disagree that military conflicts in Asia affect Canadian security interests.

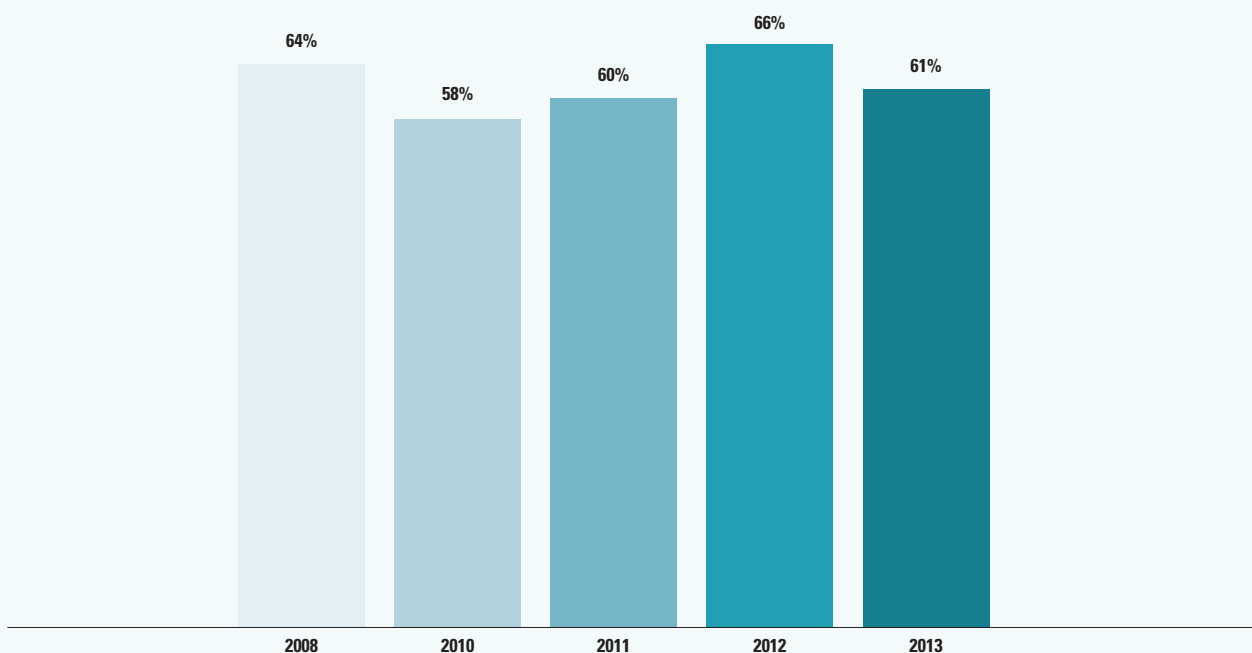
Canadian Security Concerns in Asia



Base: All respondents (n=3474)

Q.17: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries.

China's growing military power is still seen as a threat to the Asia Pacific region



Base: All respondents: 2008 (n=1058), 2010 (n=2903), 2011 (n=2926), 2012 (n=3129), 2013 (N=3474)

Q.17: For each of the statements below, please state if you strongly agree, somewhat agree, somewhat disagree, strongly disagree or don't know.

Security Concerns by Provincial Breakdown

		NORTH*	BC	ALBERTA	SK	MB	ONTARIO	QUEBEC	ATLANTIC
China's growing military power is a threat to the Asia Pacific region	% Agree	59%	65%	60%	60%	56%	64%	56%	59%
	% Disagree	27%	24%	22%	21%	18%	20%	18%	18%
Military conflicts in the Asia Pacific directly affect Canadian security	% Agree	63%	64%	59%	61%	58%	59%	41%	54%
	% Disagree	31%	25%	24%	20%	19%	25%	34%	24%
Outright military conflict between countries in the Asia Pacific is likely in the next 10 years	% Agree	67%	52%	56%	52%	43%	53%	51%	55%
	% Disagree	21%	27%	20%	16%	23%	24%	19%	20%
Canada should take a clear position on territorial disputes in the Asia Pacific region	% Agree	54%	49%	49%	48%	43%	48%	60%	42%
	% Disagree	43%	36%	33%	32%	31%	36%	19%	35%
Canada should increase its participation in regional security initiatives in Asia	% Agree	40%	45%	45%	42%	40%	44%	34%	38%
	% Disagree	52%	39%	36%	36%	31%	40%	40%	40%

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 that totals do not necessarily add up to 100.

*caution small base size in North n=50

Base: All respondents (n=3474)

Q.17: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries.

Canadians are concerned about intellectual property theft and cyber attacks

The vast majority (85%) of Canadians agree that Canada should do more to prevent cyber attacks that threaten Canadian security, including a majority who "strongly agree". This sentiment is strongest among British Columbians (91%) and the northern Canadians (95%).

A substantial majority (68%) also agree that the theft of intellectual property is a serious threat to Canadians doing businesses in Asia.

Canadians are Very Concerned about Cyber Attacks



Base: All respondents (n=3474)

Q.17: Do you agree or disagree with each of the following statements about Canada's relations with Asian countries.



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Foundation
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Fondation
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du Canada



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