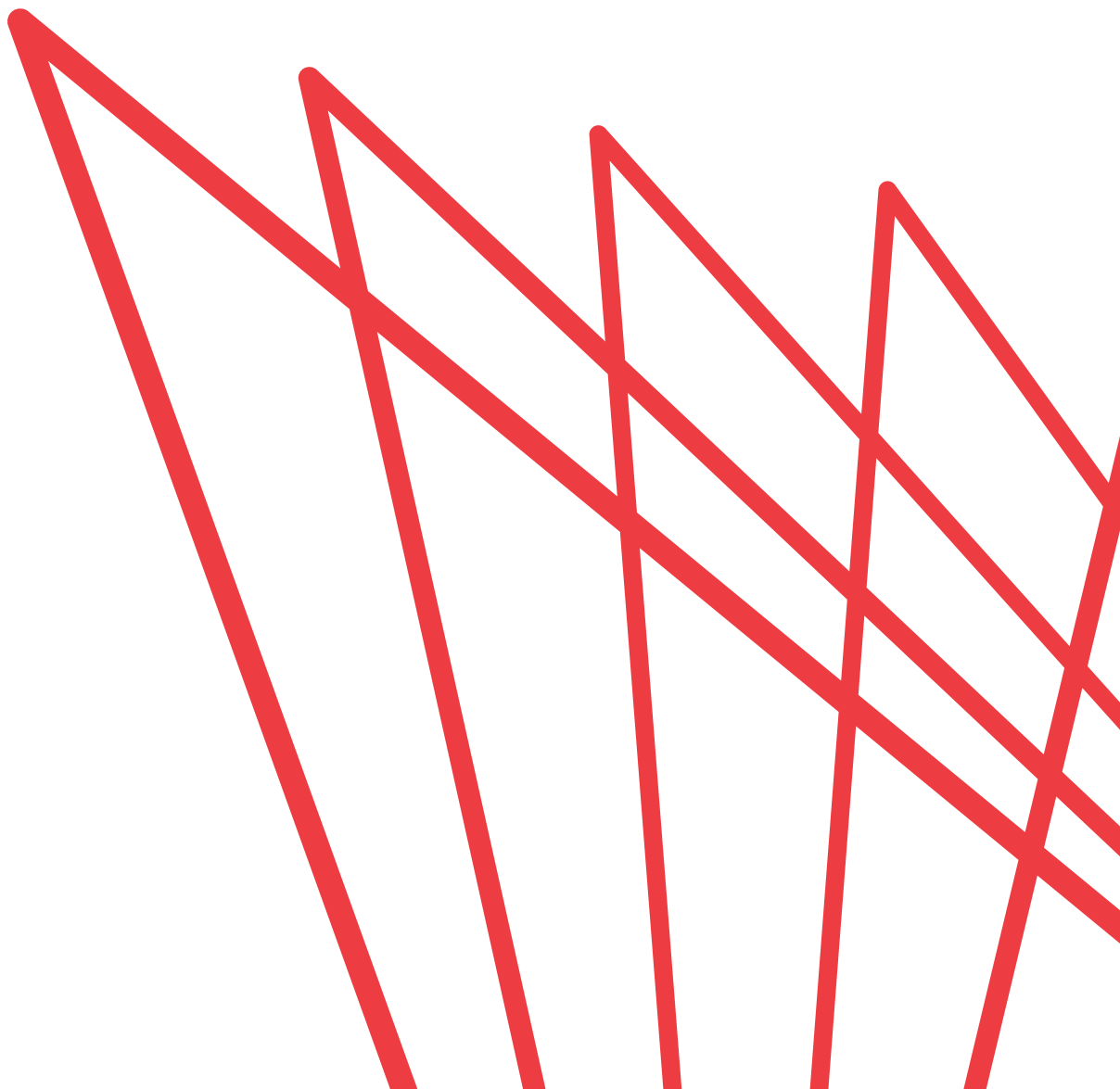


# National Opinion Poll 2018

## Canadian Views on Asia





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# ABOUT THE ASIA PACIFIC FOUNDATION OF CANADA

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

APF Canada is well known for its annual national opinion polls of Canadian attitudes regarding relations with Asia. APF Canada places an emphasis on China, India, Japan, and South Korea, while also developing expertise in emerging markets in the region, particularly economies within the Association for Southeast Asian Nations.

Visit APF Canada at [www.asiapacific.ca](http://www.asiapacific.ca).

# ABOUT THE NATIONAL OPINION POLL

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SINCE 2004, THE ASIA PACIFIC FOUNDATION OF CANADA has been conducting regular nationwide surveys to assess Canadians' attitudes toward countries in the Asia Pacific, and their perceptions of Canada-Asia relations. Unique in its construction and its objectives, APF Canada's National Opinion Poll has been instrumental in drawing a portrait of Canadians' perspectives on Asia and the region's increasing relevance to Canada's prosperity.

The 2018 National Opinion Poll is a traditional long-form survey that covers a wide range of topics. With a representative sample of the Canadian population, the survey serves as a valuable source of information on Canadian attitudes toward Asia on various topics.

# EXECUTIVE SUMMARY

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WHILE ANTI-TRADE AND ANTI-IMMIGRATION SENTIMENTS ARE ON THE RISE IN MANY PARTS OF THE WORLD, this is not necessarily true in Canada where the public is increasingly supportive of international engagement, particularly when it comes to Asia. This outlook is reflected across multiple dimensions of the Asia Pacific Foundation of Canada's new 2018 National Opinion Poll (NOP) of 3,561 Canadian adults on Canada-Asia relations.

The NOP reviews some legacy questions from our past polls regarding Asia Pacific identity, warmth of feelings toward Asia, perceived importance of Asia, Canada-Asia relations, and support for free trade agreements. It tracks consistent trends as well as changes in Canadian views on Asia.

The poll also poses some new questions that help uncover the factors driving the Canadian public's feelings about particular countries; their attitudes toward a 'progressive' trade agenda; and, their views of what role Canada should play in the international arena.

**Key takeaways from the poll are:****CANADIANS INCREASINGLY FEEL THAT THEY BELONG TO THE ASIA PACIFIC REGION.**

43% of Canadians consider Canada as part of the Asia Pacific region, up from 34% in 2016 and 18% in 2013. British Columbians have the strongest Asia Pacific identity, with 56% viewing Canada as part of the Asia Pacific region.

**FEELINGS TOWARD ASIA HAVE ‘WARMED UP’ SINCE 2010, WITH JAPAN TOPPING THE LIST OF ASIAN COUNTRIES/TERRITORIES.** In fact Japan, with a feeling thermometer rating over 7.2 out of 10 in 2018, has received the warmest feelings among all Asian nations/territories since 2010. India and China, with 2018 ratings of 5.7 and 4.9, respectively, rank the lowest but still higher than their respective ratings of 5.1 and 4.6 in 2010. Canadian feelings toward Asia are informed positively by economic performance, culture, and people, and negatively by human rights records and environmental conditions.

**CANADIANS FEEL THAT RELATIONS WITH CHINA AND SOUTH KOREA ARE IMPROVING, IN STARK CONTRAST TO THE PERCEPTION OF A WORSENING CANADA-U.S.**

**RELATIONSHIP.** 27% of Canadians say Canada-China relations are improving, up slightly from 2016. 24% perceive better Canada-South Korea relations, up from 16% in 2016. For the United States, an overwhelming majority of Canadians (80%) depict a worsening relationship. This number has skyrocketed, from 20% in 2016 and 28% in 2006.

**THE RISE OF CHINA AND INDIA IS AN OPPORTUNITY RATHER THAN A THREAT.** 71% of Canadians now agree with the statement that “the growing importance of India as an economic power is more of an opportunity than a threat,” up from 50% in 2014. 60% agree with the same statement about China, up from 41% compared with four years ago. The Atlantic provinces (69%), Saskatchewan (66%), and Manitoba (66%) are the three regions that believe most strongly that the rise of China is more of an opportunity than a threat to Canada.

**CANADIANS BELIEVE TRADE RELATIONS WITH ASIA ARE CENTRAL TO CANADA’S FUTURE.** 59% of Canadians believe trade with Asia will outweigh trade with the United States in the future, and 53% are concerned that Canada will fall behind international competitors in gaining access to Asian markets. Support for FTAs with Asia continues to grow. The support for FTAs with India (66%), ASEAN (63%), and China (59%), respectively, has increased significantly from less than 40% support for all three economies in 2014. Notably, the Asian countries that Canadians see as being most economically important (i.e. China and India) are the ones they like the least.

**A SIGNIFICANT NUMBER OF CANADIANS SUPPORT THE TRUDEAU GOVERNMENT'S PROGRESSIVE TRADE AGENDA** (i.e. one that seeks to negotiate labour and environmental standards on trade partners, along with protections for vulnerable groups). More than 40% of Canadians believe that 'progressive' elements should be included in an FTA with Asia Pacific economies. Public attitudes on this issue seemingly vary across different economies based on the economy's political affinity with Canada: people are less likely to say that progressive elements should be included in FTAs with Taiwan (40%) and Hong Kong (41%) – two societies that boast democracy and freedom – than they would for China (50%).

**CANADIANS HAVE AN AMBIVALENT ATTITUDE TOWARD ENGAGEMENT WITH ASIA IN THE ENERGY SECTOR.** While the public recognizes the importance of improving Canada's access to Asian markets, Canadians are concerned about potential environmental consequences and foreign control over Canada's natural resources. Alberta and Saskatchewan seem to hold more open attitudes to energy engagement with Asia than other provinces/territories – they are relatively less concerned about the environment and more supportive of market diversification. British Columbia, meanwhile, is the most conservative across regions, being more concerned about environmental issues and less supportive of market diversification in the energy sector.

**CANADIANS BELIEVE ASIAN IMMIGRANTS CONTRIBUTE POSITIVELY TO THE ECONOMY AND ENRICH CANADIAN CULTURE.** 74% of Canadians share the sentiment that immigration from Asia has a positive impact on the economy and 73% believe it has enriched Canadian culture. Professionals (82% positive), business immigrants (70% positive), international students (69% positive), and skilled trade workers (62% positive) are well regarded in terms of their contribution to the domestic economy. Canadians, however, hold mixed feelings toward temporary foreign workers (49% positive) and refugees (41% positive) from Asia.

**CANADIANS WELCOME ASIAN TOURISTS.** The great majority of Canadians (82%) believe that Asian tourists are good for the Canadian economy; more than 50% see great potential and 34% see moderate potential in Asian markets for Canada's tourism industry. Residents in the North and Quebec are the most optimistic about tourism from Asia, with 65% and 56%, respectively, indicating 'great potential' in their responses.

**CANADIANS EXPECT THE CANADIAN GOVERNMENT TO PROMOTE CANADIAN VALUES IN ASIA THROUGH LEADING ON ENVIRONMENTAL ISSUES AND PROMOTING DEMOCRACY AND HUMAN RIGHTS.** In engaging with Asia, a large share of Canadians expects the government to play a leading role on environmental issues (50% leader) and promoting democracy and human rights (49% leader). Canadians tend to believe their government should partner with other countries on socio-economic issues (i.e. trade and investment, poverty, and social and cultural relationships) and security issues (i.e. cyber security, peacekeeping, and combatting terrorism).



**CANADIANS RECOGNIZE THE IMPORTANCE OF ASIA COMPETENCY AND WANT TO SEE MORE ASIA IN THE PUBLIC SCHOOL CURRICULUM AND MORE STUDENT EXCHANGE PROGRAMS.** In response to provincial policies to build stronger ties with Asia, support for co-op or exchange programs is widespread for most provinces/regions, with Alberta (68%) and Manitoba (66%) having the lowest support. Policies to promote teaching about Asia in the public education system are less popular yet still high (60% support), with the three Prairie provinces showing the lowest level of support.

All in all, compared with two years ago, Canadian views on Asia have shifted in a positive direction, especially with respect to economic matters. However, concerns remain over possible foreign threats to Canadian values. Striking a balance between the two will be the key to formulating Canada's Asia strategy.

# SURVEY RESULTS

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**THE FOLLOWING SECTIONS** present key findings about Canadian views on Asia regarding subjective connection and feelings, trade and investment relations, free trade agreements, engagement in the energy sector, tourism and immigration, and foreign policy.

Overall, we find increasingly positive and open attitudes of Canadians toward Asia despite concerns over particular matters and variations across regions. Canadians tend to favour an Asia strategy that protects Canadian values at home and abroad while promoting economic interests through engagement with Asia.

We should point out that this report mainly focuses on the general pattern of Canadians' views with noted regional disparities. Variations in attitudes across population groups (gender, age, ethnicity, education, etc.) require further analysis.

For the purpose of regional analysis and in view of the sample size, some provinces/territories were collapsed into one region, resulting in the following provinces/regions:

- British Columbia
- Alberta
- Saskatchewan
- Manitoba
- Ontario
- Quebec
- Atlantic provinces  
New Brunswick, Prince Edward Island, Nova Scotia, and  
Newfoundland and Labrador
- Northern Canada  
Yukon, Northwest Territories, and Nunavut

Northern Canada had only 52 respondents; therefore, results for this region should be interpreted with caution.

# SECTION 1

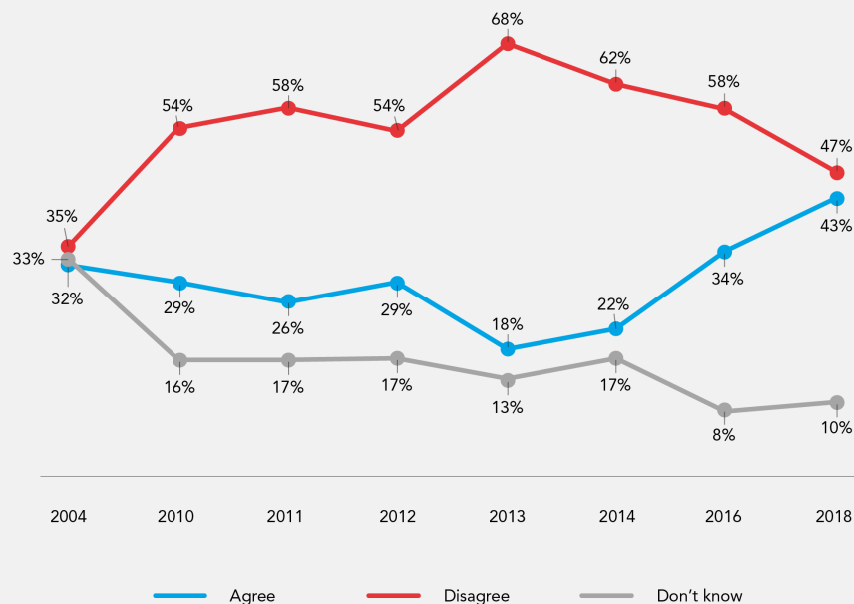
## ASIA PACIFIC IDENTITY

### ASIA PACIFIC IDENTITY STRENGTHENS OVER TIME.

Canadians are split on whether Canada is part of the Asia Pacific region – 43% identify with the Asia Pacific and 47% do not. However, the identity of Canada being an Asia Pacific nation has strengthened over time, especially since 2013.

British Columbians have the strongest Asia Pacific identity, with 56% (23% strongly agree, 33% agree) viewing Canada as part of the Asia Pacific region.

Canadians feel more connected with the Asia Pacific over time



Base: 2004 (n=547); 2010 (n=2,903); 2011 (n=2,926); 2012 (n=3,129); 2013 (n=3,474); 2014 (n=3,487); 2016 (n=3,526); 2018 (n=3,561)

Q3A: Do you agree or disagree with the following statement: "I consider Canada to be part of the Asia Pacific region"?

Note: Wording for this question was the same for all years.

### THERE IS A SENSE OF OPTIMISM ABOUT CANADA-ASIA RELATIONS.

This year, we asked the legacy question about Canada's relations with different countries/regions/territories. "Staying about the same" received the most responses for all countries except the United States – an overwhelming majority (80%) depict a worsening relationship between Canada and the United States; this number has skyrocketed from 20% in 2016 and 28% in 2006.

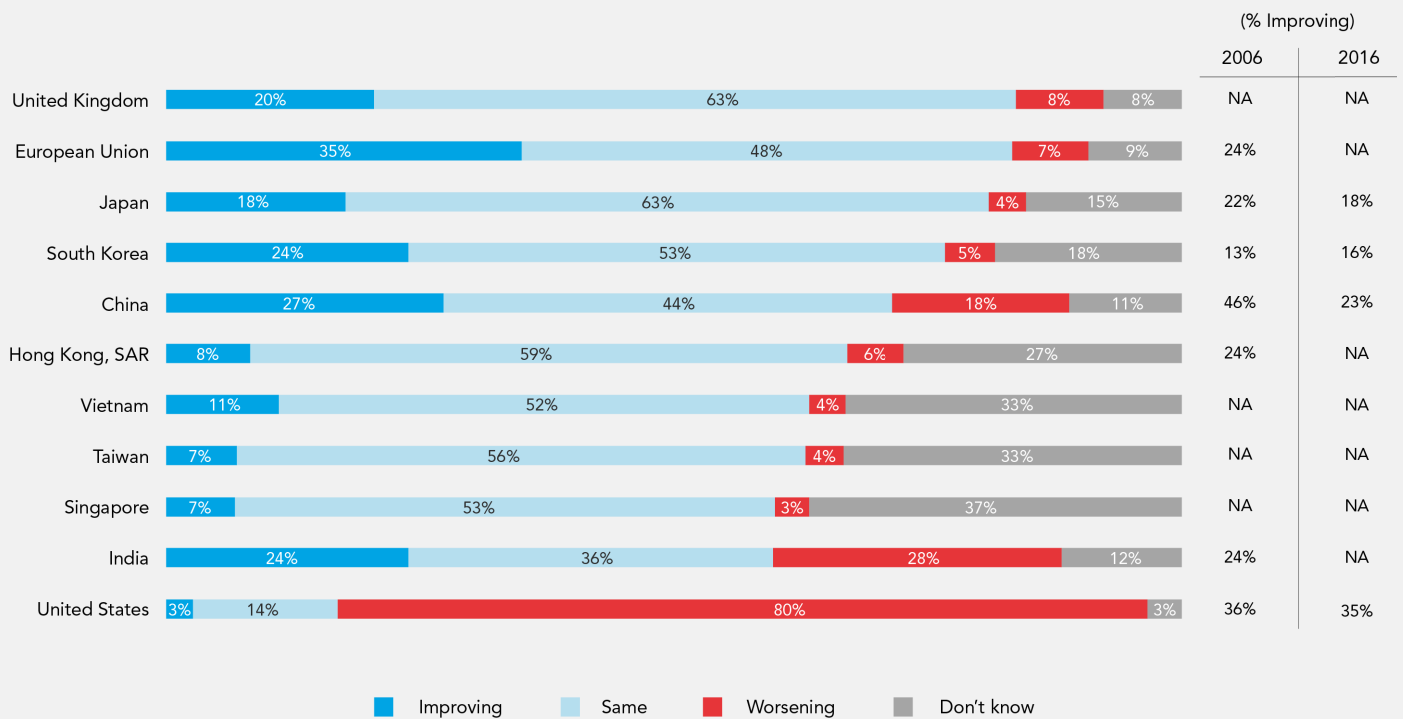
Among Asian countries/territories, Canadians are most positive about Canada's relationships with Japan and South Korea – nearly 80% believe Canada's bilateral relations with the two countries are staying the same or improving. Responses of improved Canada-South Korea relations increased by eight percentage points compared with 2016, and 11 percentage points compared with 2006.

Across the listed countries/territories, a relatively large share of the Canadian public sees relations with India and China deteriorating (28% and 18%, respectively). However, longitudinal comparison indicates there may be grounds for optimism in the Canada-China relationship – since 2016, more Canadians perceive that the relationship has improved.

It is notable that a significant proportion of Canadians indicate "don't know" in terms of Canada's bilateral relations with Singapore, Vietnam, Taiwan, and Hong Kong, suggesting the public is less informed about these economies.

Not surprisingly, Canadians are the most optimistic about Europe. Brexit did not seem to influence public perceptions of Canada's bilateral relationships with this region. Over 80% of Canadians believe Canada's relationships with the European Union and the United Kingdom are either staying the same or improving, whereas less than 10% perceive a worsening relationship.

### The majority of Canadians perceive improved or stable relations with Asia



Base: 2006 (n=1,014); 2016 (n=3,526); 2018 (n=3,561)

Q6 (2016, 2018): In your opinion, are relations between Canada and the following countries/regions/territories improving, worsening, or staying about the same?

Note: 2006 question: Compared with two years ago, are Canada's relations with the following countries/regions better, worse or about the same?

# SECTION 2

## OVERALL FEELINGS TOWARD ASIA

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### FEELINGS TOWARD ASIA WARM UP OVER TIME, WITH JAPAN TOPPING THE LIST OF ASIAN COUNTRIES/TERRITORIES.

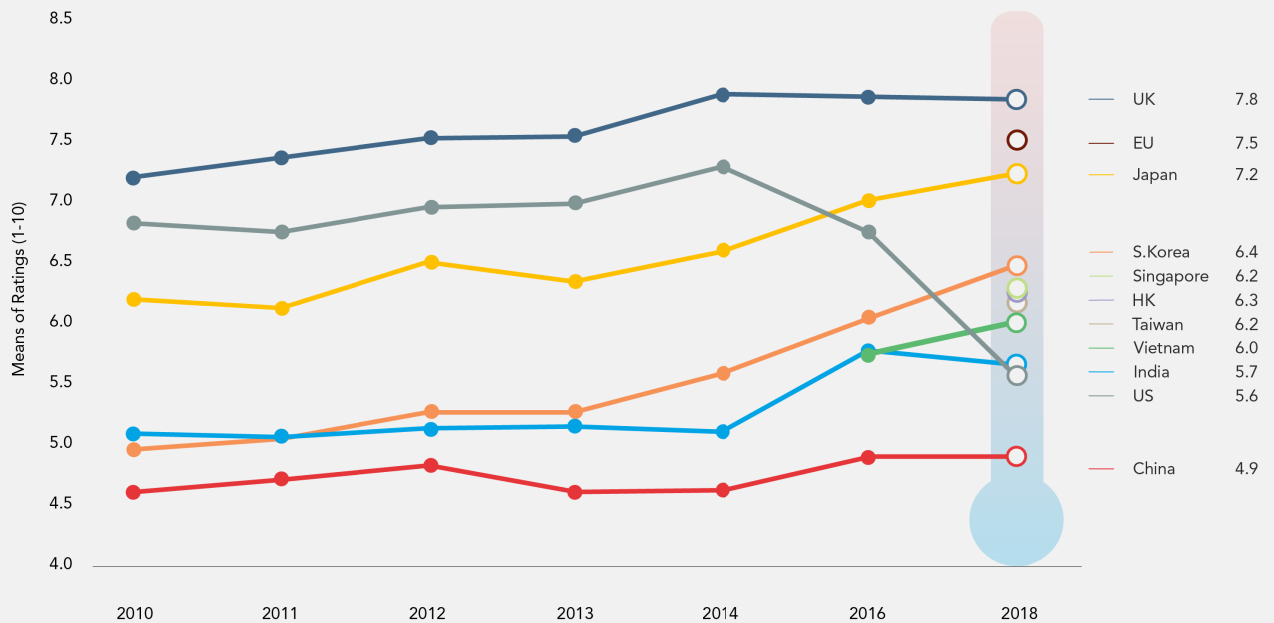
Consistent over time, Canadians tend to have lukewarm feelings toward most Asian countries/territories, with feeling thermometer ratings between 4 to 7 out of 10. However, the feelings have warmed up since 2010.

Japan has received the warmest feelings among all Asian nations/territories for all years between 2010 and 2018. It is the only Asian country that receives an average feeling thermometer score over 7 in 2018, close to that of the United Kingdom (7.8) and the European Union (7.5). Following Japan, the thermometer ratings for South Korea, Singapore, Hong Kong, Taiwan, and Vietnam reach slightly over 6 in 2018. India and China, with 2018 ratings of 5.7 and 4.9, respectively, ranked the lowest.

For most Asian countries/territories on the list, including India and China, Canadian feelings have warmed up since 2010. Notably, despite the cooler feelings that Canadians have toward China, the average thermometer score in 2018 has increased significantly compared with 2010 and 2013.

The most striking result pertains to public attitudes toward the United States – the feeling thermometer score plummeted from 6.7 in 2016 to 5.6 in 2018. This is likely due to the Trump administration and its anti-globalization policies.

### Canadian feelings toward Asia have warmed up over time



Base: 2010 (n=2,903); 2011 (n=2,926); 2012 (n=3,129); 2013 (n=3,474); 2014 (n=3,487); 2016 (n=3,526); 2018 (n=3,561)

Q1: Please rate your feelings toward Asia in general, with 10 meaning you have a “very warm, favourable” feeling and 1 meaning you have a “cold, unfavourable” feeling.

Note: For 2010, 2011, and 2012, the thermometer score range between 0 and 10 and 0 was treated as 1 to calculate the mean.

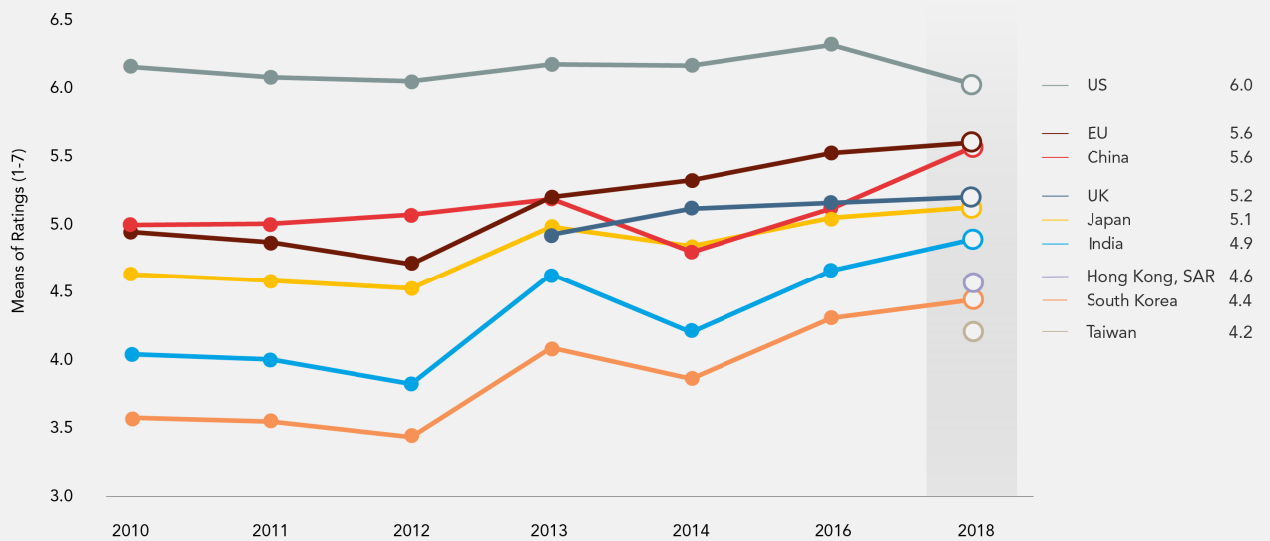
### CANADIANS RECOGNIZE THE GROWING IMPORTANCE OF ASIAN ECONOMIES TO CANADA, WITH CHINA CATCHING UP WITH THE EUROPEAN UNION.

Since 2010, Canadians have perceived the growing importance of Asia to the economic well-being of Canada’s future generations. The importance ratings measured on a scale of 1 to 7 for China (5.6), Japan (5.1), India (4.9), and South Korea (4.4) in 2018 have all seen a statistically significant increase compared with 2010.

Interestingly, however, the countries regarded by Canadians as being most important to Canada’s economy may not be the ones they like most. While China receives cooler feelings and more negative perceptions than other Asian economies, it tops the importance ranking among the Asian economies, just after the United States (6.0) and the European Union (5.6). In fact, China has been regarded by the Canadian public as the most important Asian economy to Canada in most years since 2010. Japan and India have maintained the second and third places over the years. South Korea, one of Canadians’ most welcomed Asian countries, is perceived as being as important as the other two ‘Asian Dragons’: Hong Kong (4.6) and Taiwan (4.2).

Regarding the United States, despite unfavourable attitudes, Canadians still believe in its paramount importance to Canada’s economy, with only a slight decrease of 5% in the importance rating compared with 2016.

### Canadians are increasingly aware of the importance of Asia to Canada’s economic well-being



Base: 2010 (n=2,903); 2011 (n=2,926); 2012 (n=3,129); 2013 (n=3,474); 2014 (n=3,487); 2016 (n=3,526); 2018 (n=3,561)

Q2: Would you say each of the following countries, regions or territories will be important to the economic well-being of Canada’s future generations? Please rate from 1 to 7, with 1 meaning “not important at all” and 7 meaning “very important.” If you have no opinion of that country/region/territory, please also indicate this.

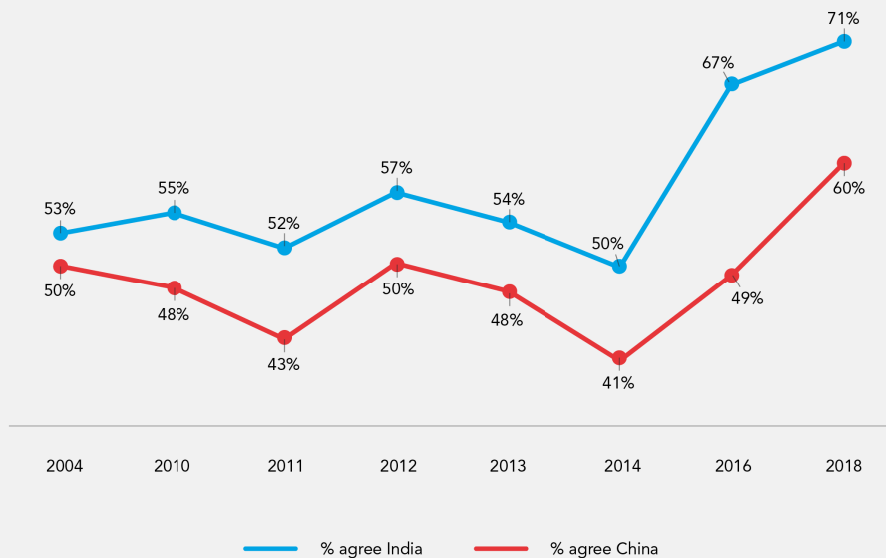
Note: 2010 question: How important are each of these countries or regions to Canada’s prosperity and well-being? 2011-2016 question: Generally speaking, would you say each of the following countries or regions is important or not important to Canada’s prosperity?



The perception of the growing importance of Asia to the Canadian economy is further corroborated by Canadians’ increasing recognition of the growing economic power of India and China as an opportunity rather than a threat. Compared with four years ago, Canadians agreeing with the statement that “the growing importance of India as an economic power is more of an opportunity than a threat” increased by 21 percentage points, and agreement with the same statement about China increased by 19 percentage points.

The Atlantic provinces (69%), Saskatchewan (66%), and Manitoba (66%) are the three regions that have the strongest belief that the rise of China is more of an opportunity than a threat to Canada.

**The belief that the rise of China or India is more of an opportunity than a threat to Canada strengthens over time**



**Base:** 2004 (n=547); 2010 (n=2,903); 2011 (n=2,926); 2012 (n=3,129); 2013 (n=3,474); 2014 (n=3,487); 2016 (n=3,526); 2018 (n=3,561)

**Q3B:** Do you agree or disagree with the following statement: “The growing importance of China as an economic power is more of an opportunity than a threat to Canada”?

**Q3C:** Do you agree or disagree with the following statement: “The growing importance of India as an economic power is more of an opportunity than a threat to Canada”?

**Note:** 2004 question: Do you agree or disagree with the following statement: “The growing importance of China as an economic power is more of a threat for Canada than it is an opportunity”? The agree-disagree response scale was reversed for comparison purposes.

# SECTION 3

## EXPLAINING FEELINGS TOWARD ASIA

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### CANADIANS ASSOCIATE DIFFERENT FACTORS WITH THEIR FEELINGS TOWARD DIFFERENT ASIAN COUNTRIES.

In order to decipher why Canadians have positive feelings about some Asian countries and negative feelings about others, we asked respondents to indicate factors that they feel most positive and most negative about Japan, South Korea, China, and India, respectively.

As the most highly regarded Asian countries, Japan and South Korea are much more likely to be associated with positive terms than negative terms. Thirty per cent of Canadians say they feel most positive about Japan's culture and 25% about its economy. Positive feelings toward South Korea are mostly associated with its people (25%) and economy (24%). In contrast, when it comes to negative attributes, half of Canadians indicated either "none of the above" or "don't know" in their responses for the two countries. A small share of Canadians associates their negative feelings with history (11%) or environmental conditions (11%) for Japan and military activities (11%) for South Korea.

Canadians tend to have cooler feelings toward China and India compared with Japan and South Korea. For China, negative feelings are mostly associated with its human rights record (42%), followed by environmental conditions (18%) and government (16%). For India, environmental conditions (35%) and its human rights record (20%) are the top two sources of negative feelings.

Positive feelings about China, if any, are mostly associated with its economy (30%), followed by its culture (15%) and history (13%). India receives positive perceptions largely due to its culture (23%), people (19%), and economy (19%).

## Factors associated with positive and negative feelings toward different countries



**Base:** All respondents (n=3,561)

**Q4:** From the dropdown menu, please choose the factors you feel most positive and most negative, respectively, about each of the following countries. (List of factors: People, Culture, History, Landscape, Economy, Investment in Canada, Environmental conditions, Government, Human rights records, Military activities, None of the above, Don't know)

**Note:** The relative size of a descriptive term indicates its frequency of response from the survey. Repetition of terms is used to fill the map and not associated with actual responses. Blue indicates factors for positive feelings; red indicates factors for negative feelings.

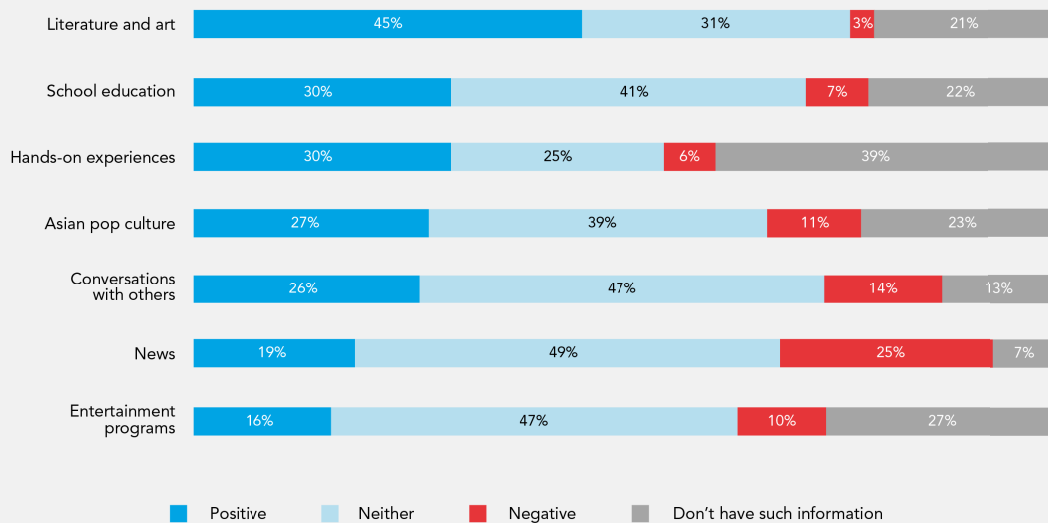
PERCEPTIONS OF ASIA ARE SHAPED BY DIFFERENT TYPES OF INFORMATION.

Our 2017 NOP, Millennial Views on Asia, revealed that most Canadians get information about Asia from traditional media (e.g., print newspaper, TV, radio), social media, and websites. In this poll, we dive deeper to look at how different sources of information, regardless of platform, affect public perceptions.

Literature and art (e.g., books, artwork), school education, and hands-on experiences (e.g., work, travel, life experience) are the three sources of information that are most likely to contribute to positive feelings toward Asia – respondents indicate that these types of information (45%, 30%, and 30%, respectively) make them feel more positive about Asia. We should also note that a significant proportion of Canadians say they do not have such information, indicating a lack of interest in or access to such information.

Regarding news from various sources about Asia, nearly half of Canadians (49%) believe it has neither a positive nor a negative influence on their feelings. Yet, a significantly higher proportion indicate a negative (25%) rather than a positive (19%) influence of news on their feelings on Asia. The percentage of negative response for news is also much higher than that for other sources of information.

Perceived impact of different types of information on feelings toward Asia



Base: All respondents (n=3,561)

Q5: Generally speaking, would you say the type of information about Asia you get from the following sources makes you feel positive or negative about Asia? (News from various sources including TV, radio, social media, etc. in Canada/Asia; Entertainment programs (e.g. talk show, drama, reality show, etc.) in Canada/Asia; Conversations with family, friends and co-workers, etc.; Hands-on experiences about/in Asia (e.g. work, travel, life experience, etc.); School education; Literature and art about/from Asia (e.g. books, artworks, etc.); Asian pop culture (e.g. music, movies, fashion, video games, etc.))

# SECTION 4

## TRADE AND INVESTMENT

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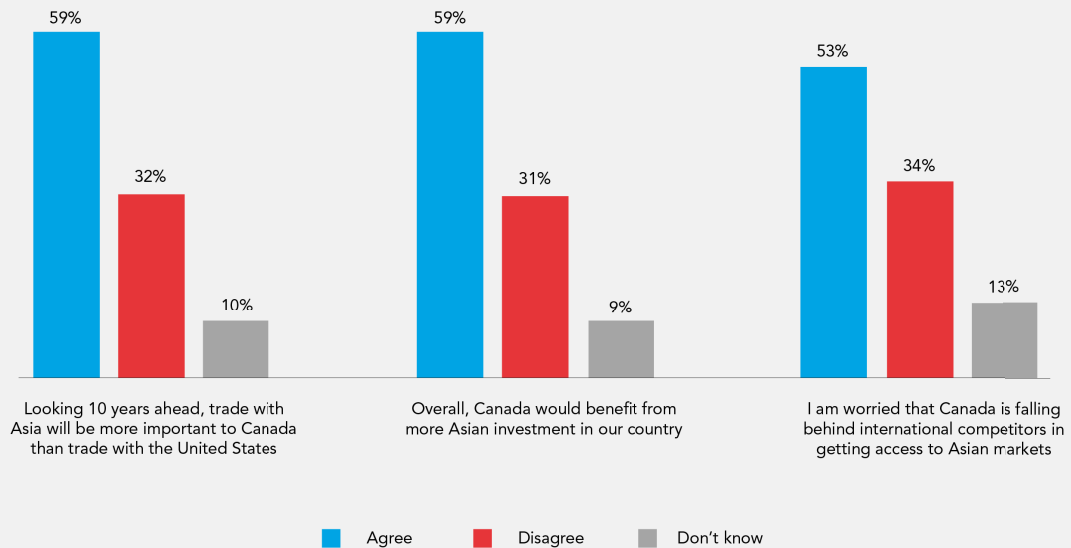
### TRADE AND INVESTMENT RELATIONSHIPS WITH ASIA ARE IMPORTANT.

Canadians in general believe trade and investment relationships with Asia will carry increasing weight in the future, while they are concerned about Canada falling behind international competitors in the global economy.

The majority (59%) of Canadians agree that, in 10 years, trade with Asia will outweigh trade with the United States and that more investment from Asia would be beneficial to Canada. Support for the statement that “Canada would benefit from more Asian investment” has increased by 15 percentage points compared with 2016. This is possibly due to the strengthening Asian economy and the anti-trade policies in the United States, Canada’s largest trading partner. Over half of Canadians worry that Canada may fall behind in gaining access to Asian markets.

Interestingly, British Columbians are the least concerned about Canada falling behind global competition, with 40% disagreeing or strongly disagreeing with the statement. British Columbia also sees the strongest opposition (43%) to the idea that more Asian investment would benefit Canada, 12 percentage points higher than the national level.

### Canadians recognize important trade and investment relationship with Asia



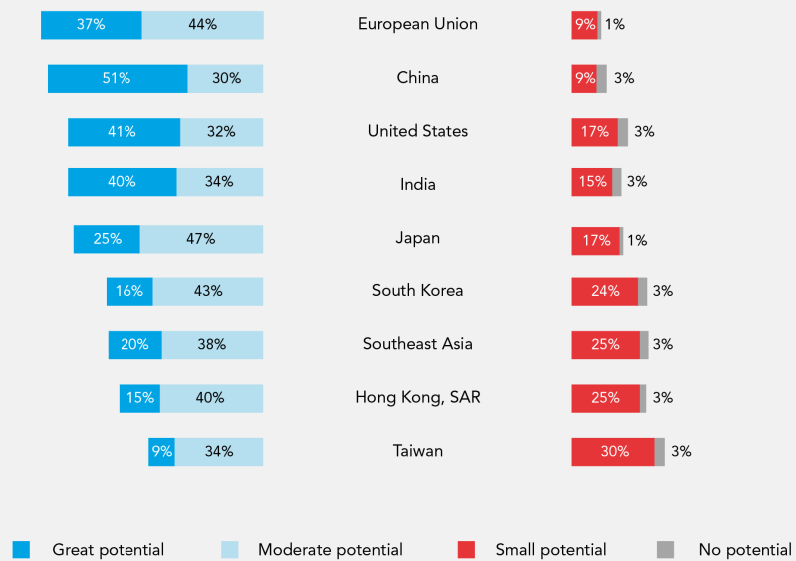
**Base:** All respondents (n=3,561)  
**Q7:** Do you agree or disagree with each of the following statements about Canada and the global economy?

### CHINA AND INDIA ARE PERCEIVED AS THE ASIAN ECONOMIES WITH THE GREATEST MARKET POTENTIAL FOR CANADA.

Canadians see Chinese and Indian markets as holding the greatest potential for Canadian businesses. Fifty-one per cent think the Chinese market offers great potential for Canada, 10 percentage points higher than the United States and 14 percentage points higher than the European Union. India follows China with 40% of Canadians saying it has great market potential for Canada.

Other major Asian economies, including Japan, South Korea, and Southeast Asia, are more likely to be perceived by Canadians as offering moderate market potential for Canadian economic interests.

### Canadians perceive great potential in China and India for Canadian economic interest



Base: All respondents (n=3,561)

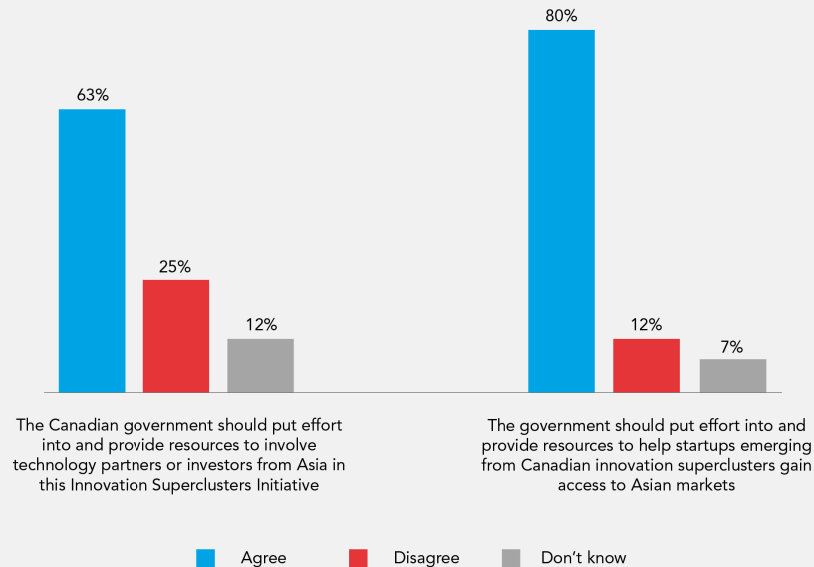
Q8: In your view, does each of the following markets hold great potential, moderate potential, small potential, or no potential for Canadian economic interests abroad (e.g. exports, investment, e-commerce, etc.)?

### CANADIANS SUPPORT THE INNOVATION SUPERCLUSTER INITIATIVE AS A WAY TO PROMOTE CANADA-ASIA ECONOMIC ENGAGEMENT.

In 2017, the federal government launched a nationwide competition called the Innovation Superclusters Initiative (ISI) to create large-scale clusters (i.e. superclusters) of highly innovative industries (including private, academic, and public sectors) to supercharge Canada’s regional innovation ecosystems and establish Canada as a global centre for innovation.

Aware of the great potential in Asian markets, Canadians in general would support government efforts and resources to promote Canada-Asia engagement through the ISI. Sixty-three per cent say the government should involve technology partners or investors from Asia in this initiative. An even higher percentage (80%) say the government should help startups gain access to Asian markets.

## Canadians believe the government should engage Asia through the Innovation Superclusters Initiative



**Base:** All respondents (n=3,561)

**Q9:** In 2017, the federal government launched a nationwide competition (Innovation Superclusters Initiative) to create large-scale clusters (i.e. superclusters) of highly innovative industries (includes private, academic and public sectors) that will lead and invest in bold and ambitious projects, supercharge Canada's regional innovation ecosystems and establish Canada as a global centre for innovation.

**A:** Do you agree or disagree that the Canadian government should put effort into and provide resources to involve technology partners or investors from Asia in this Innovation Superclusters Initiative?

**B:** Do you agree or disagree that the Canadian government should put effort into and provide resources to help startups emerging from Canadian innovation superclusters gain access to Asian markets?

### CANADIANS ARE WARY OF TOO MUCH INVESTMENT FROM CHINA.

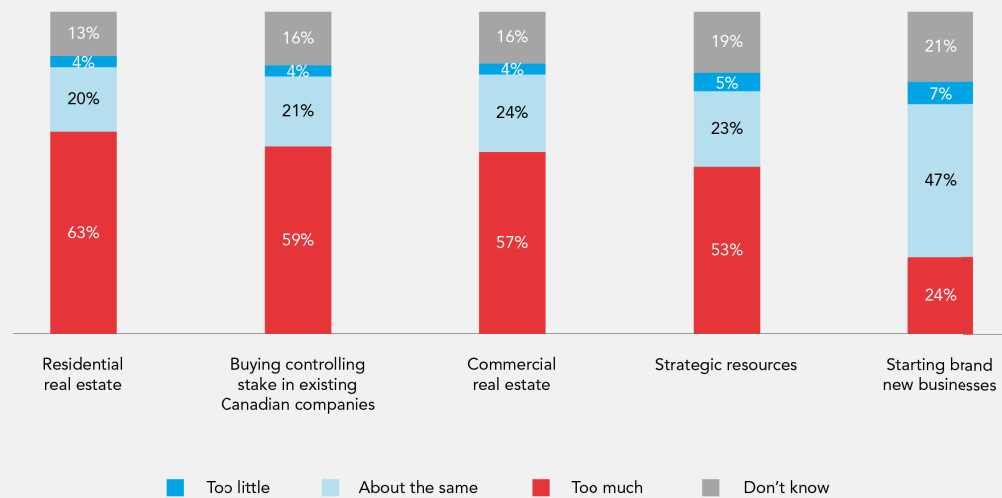
Despite the overall positive attitudes toward the Chinese market, Canadians express concerns about over investment from China, particularly in residential real estate and commercial real estate where around 60% perceive “too much” investment. The public is a little less likely to perceive over investment in strategic resources (e.g., energy, communications, transportation, water) compared with the other two categories – 53% indicate “too much” Chinese investment in this category – although the energy sector alone accounts for 68% of Chinese investment in Canada between 2013 and 2017, according to APF Canada’s [Investment Monitor](#) data. The stronger concerns over the real estate sectors may be because investment in real estate has a more immediate and visible impact on the daily lives of the general public than does foreign investment in the energy sector. Moreover, our Investment Monitor data show Chinese investment in the energy sector only represents a small share (15%) of total Chinese investment deals, and this may have also dampened public perception of investment in strategic resources.



In terms of modes of investment, Canadians are relatively open to greenfield investment (i.e. companies starting new businesses) – 47% say investment from China is about the right amount in this category. In contrast, 59% indicate there is too much investment through company buyouts. Our Investment Monitor data show that Chinese greenfield investment only accounts for 14% of the total investment value from China.

British Columbians and Albertans are the most likely to perceive “too much” investment across all the categories while Quebecers are the least likely to perceive over investment.

### Canadians worry about over investment from China



Base: All respondents (n=3,561)

Q14: Do you think the Canadian government is letting in too much, too little, or about the right amount of investment from China in each of the following areas? (Starting brand-new businesses (e.g. restaurants, shops, banks, etc.); Buying a controlling stake in existing Canadian companies; Commercial real estate (e.g. retail spaces, office buildings, apartment complexes, industrial factories, etc.); Residential real estate (e.g. apartment rooms/units, town houses, etc.); Strategic resources (e.g. energy, communications, transportation, water))

# SECTION 5

## FREE TRADE AGREEMENTS

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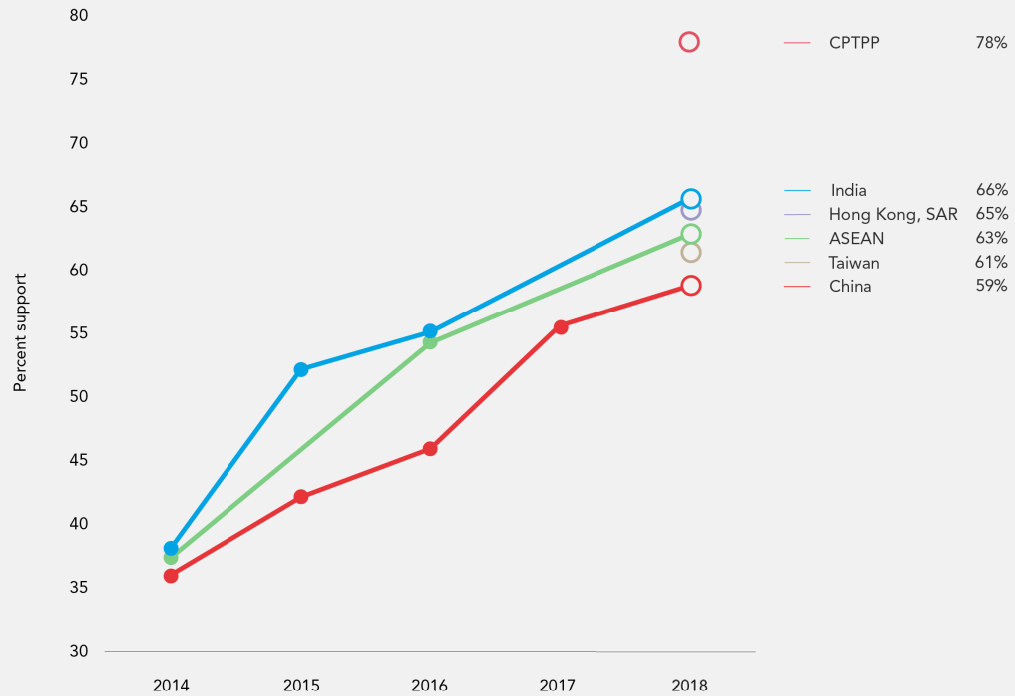
### CANADIANS ARE SUPPORTIVE OF FREE TRADE AGREEMENTS WITH THE ASIA PACIFIC BUT WOULD PRIORITIZE NAFTA OVER OTHER AGREEMENTS.

The signing of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) in March this year signifies Canada's closer economic engagement with the Asia Pacific region. This poll, conducted shortly after the conclusion of the CPTPP, suggests strong public support for the deal, with 78% of Canadians in support.

There is also strong support for potential free trade agreements (FTAs) with selected Asian economies, with India on top (66% support), followed by Hong Kong (65% support), the Association of Southeast Asian Nations (ASEAN) (63% support), Taiwan (61% support), and China (59% support). Despite the variations, the support for FTAs with India, ASEAN, and China, respectively, have increased by more than 20 percentage points compared with 2014.

Across the country, British Columbia has the strongest opposition (50% support, 40% oppose) to a potential FTA with China.

### The majority of Canadians are supportive of FTAs with Asian economies



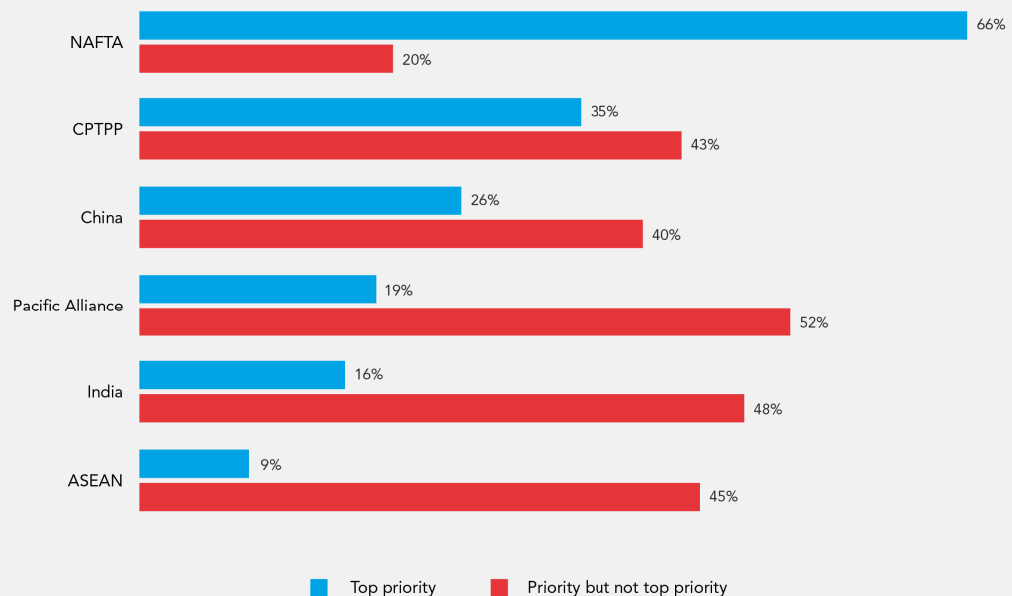
Base: 2014 (n=3,487); 2015 (n=1,554); 2016 (n=3,526); 2018 (n=3,561)

Q11: Would you support or oppose the Canadian government entering into/ratifying (an FTA with)...?

Note: 2014-2016 question: Do you support or oppose the Canadian government entering into a free trade agreement with each of the following countries or regional organizations? 2017 question: Do you support or oppose the Canadian government entering into a free trade agreement with China?

Despite the majority support for potential FTAs with Asian economies, Canadians believe NAFTA is the most urgent item for the government – 66% say this should be the Canadian government’s top priority, as compared to 26% for China, 16% for India, and 9% for ASEAN.

## Canadians would prioritize NAFTA over FTAs with Asian economies



**Base:** All respondents (n=3,561)

**Q12:** The Canadian government is negotiating or having exploratory discussions on free trade agreements (FTAs) with different countries/regions/territories. Which of the following do you think should be the government's priority?

**Note:** Percentages of "Not a priority" and "Don't know" not shown.

### CANADIANS HAVE A STRONG VIEW THAT THE GOVERNMENT SHOULD ADOPT THE 'PROGRESSIVE' AGENDA IN TRADE NEGOTIATIONS WITH ASIA.

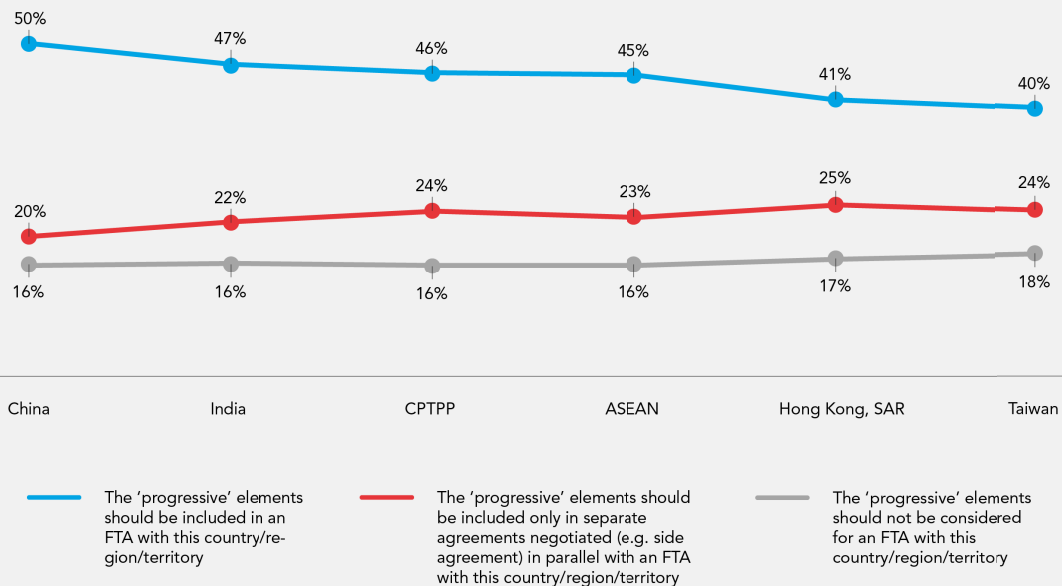
The Trudeau government has been promoting a 'progressive' trade agenda that aims to include within trade agreements chapters to address issues related to labour, environment, gender, and minority groups. While this agenda may be well-intended, it has sparked intense debates among the public, especially around the trade-offs between championing Canadian values and compromising Canadians' overall economic well-being.

In this poll, we asked respondents whether they think these progressive elements should be included in the trade agreements with Asian economies, should be included in a side agreement (i.e. separate agreements negotiated in parallel with an FTA), or should not be considerations for FTAs. Not surprisingly, Canadians are most likely to advocate the inclusion of progressive elements as chapters in trade agreements for all major Asian economies, particularly when it comes to China – half of Canadians hold this view toward an FTA with China.

Variation in public attitudes on this issue as they pertain to different economies seems to be linked with an economy’s political affinity with Canada: people are less likely to say that progressive elements should be included in FTAs with Taiwan (40%) and Hong Kong (41%) – the two societies that boast democracy and freedom – than they would for China (50%).

Across Canadian provinces/territories, Northern Canada, British Columbia, and Quebec are the strongest supporters for the progressive trade agenda – the support in these regions for the statement that “the ‘progressive’ elements should be included in an FTA” is significantly

### Canadians are most likely to support a progressive trade agenda for all FTAs with Asia



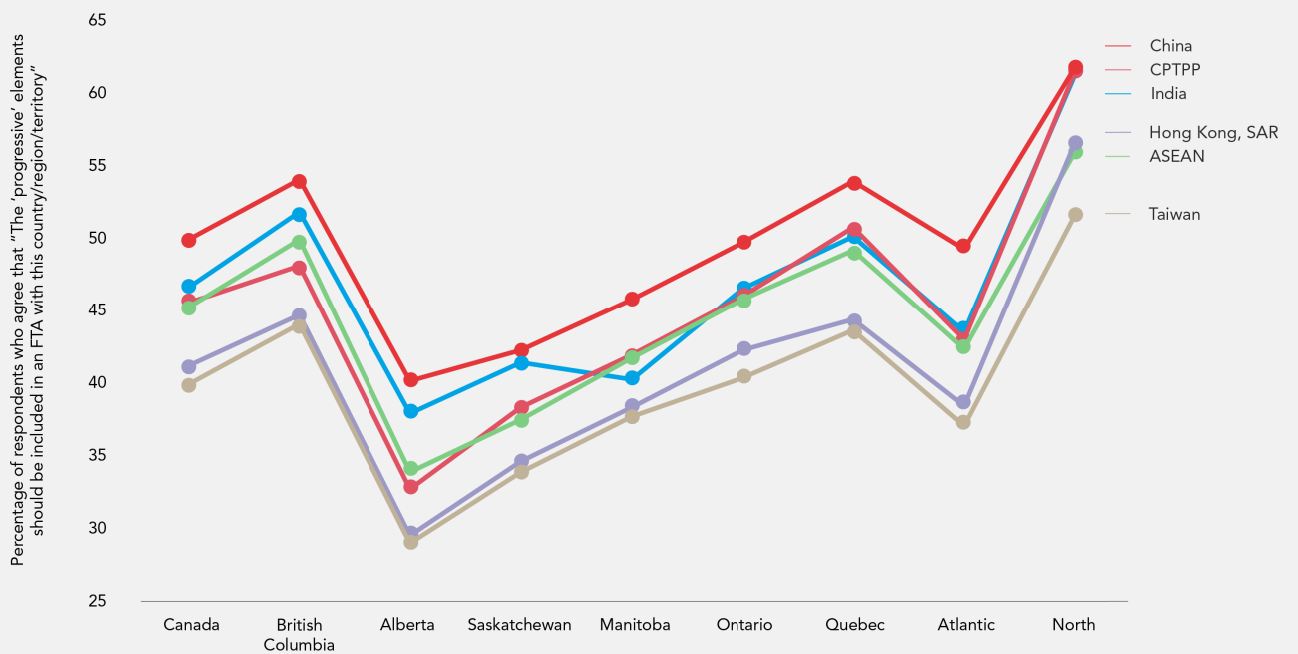
Base: All respondents (n=3,561)

Q13: Which of the following statements best reflects your opinion on the government’s approach to each of the following trade agreements?

Note: Percentages of “Don’t know” not shown.

higher than the national level for most of the listed Asian economies/regions. In Alberta, compared with other parts of Canada, a significantly lower percentage of the population supports the progressive trade agenda and a greater share believes the progressive elements should be included in separate agreements or not be considered for FTAs with Asia.

### Canadian views on the progressive trade agenda vary across regions



Base: Canada (n=3,561); BC (n=441); AB (n=399); SK (n=109); ON (n=1,360); QC (n=831); ATL (n=242); North (n=52)

Q13: Which of the following statements best reflects your opinion on the government's approach to each of the following trade agreements?

# SECTION 6

## ENGAGEMENT IN THE ENERGY SECTOR

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CANADIANS RECOGNIZE THE IMPORTANCE OF ENGAGING ASIA IN THE ENERGY SECTOR, BUT ARE ALSO CONCERNED ABOUT ENVIRONMENTAL CONSEQUENCES AND FOREIGN CONTROL OVER NATURAL RESOURCES.

Energy is one of the sectors the Canadian government identifies as having great potential for growth and global competitiveness. Both public and private sectors have made efforts to pursue deeper engagement with Asia in this area. However, engagement in this sector is not without debate, especially around environmental issues, foreign control over national resources, and pipeline construction.

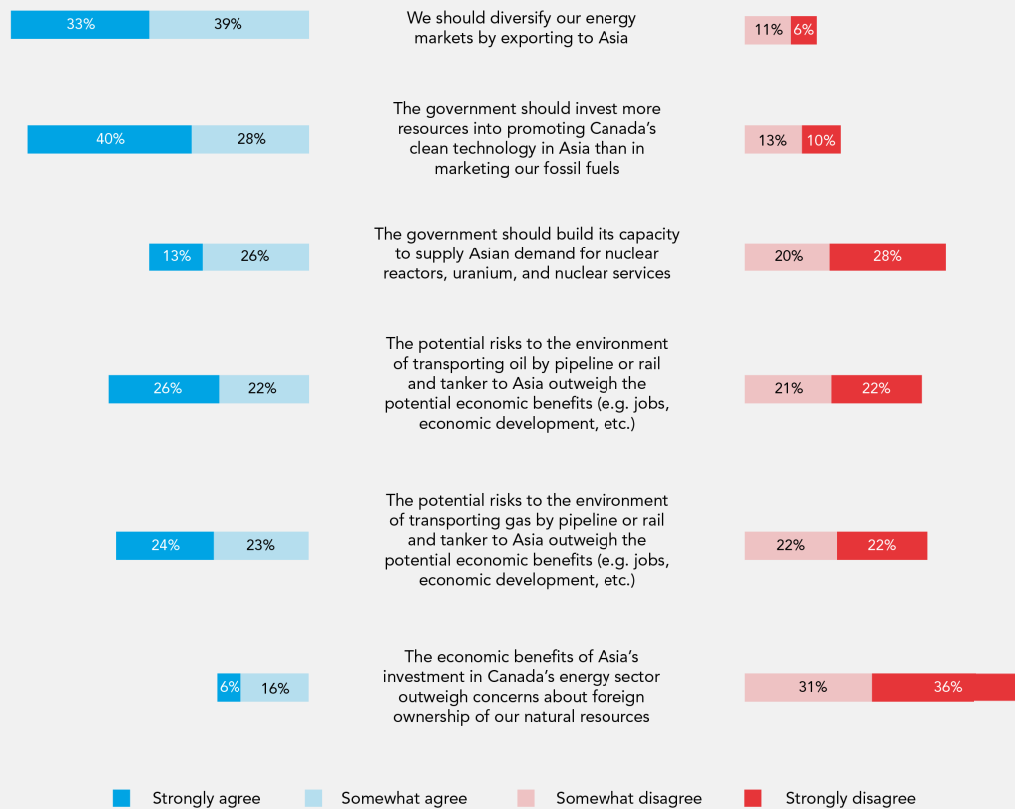
In general, Canadians believe “Canada should diversify its energy markets by exporting to Asia” – this view is supported by more than 70% of the population. When it comes to specific products and services, Canadians are particularly supportive of the government promoting clean technology rather than fossil fuels and nuclear energy – a good majority (68%) agree that “the government should invest more resources into promoting clean technology in Asia than in marketing our fossil fuels,” and nearly half (48%) do not believe that Canada “should build its capacity to supply Asian demand for nuclear reactor, uranium, and nuclear services.”

Despite the broad support for diversifying Canada’s energy market, there are some aspects, particularly around environmental consequences and foreign control over natural resources, that Canadians still find disconcerting regarding foreign engagement in the energy sector. Specifically, Canadians are divided on whether the potential risks to the environment of

transporting oil and gas to Asia outweigh the potential economic benefits. In the case of oil, 48% feel that the risks are greater than the potential benefits; in the case of gas, 47% have come to a similar conclusion. This can be compared to 43% and 44%, respectively, who counter this view.

Foreign control over Canada’s natural resources is another concern. The majority (67%) feel that concerns about foreign ownership of Canada’s natural resources outweigh the economic benefits of Asia’s investment in Canada’s energy sector.

### Canadians believe engagement with Asia in the energy sector is important, despite some concerns



Base: All respondents (n=3,561)

Q15: Do you agree or disagree with the following statements about Canada’s engagement with Asia in the energy sector?

Note: Percentages of “Don’t know” not shown.

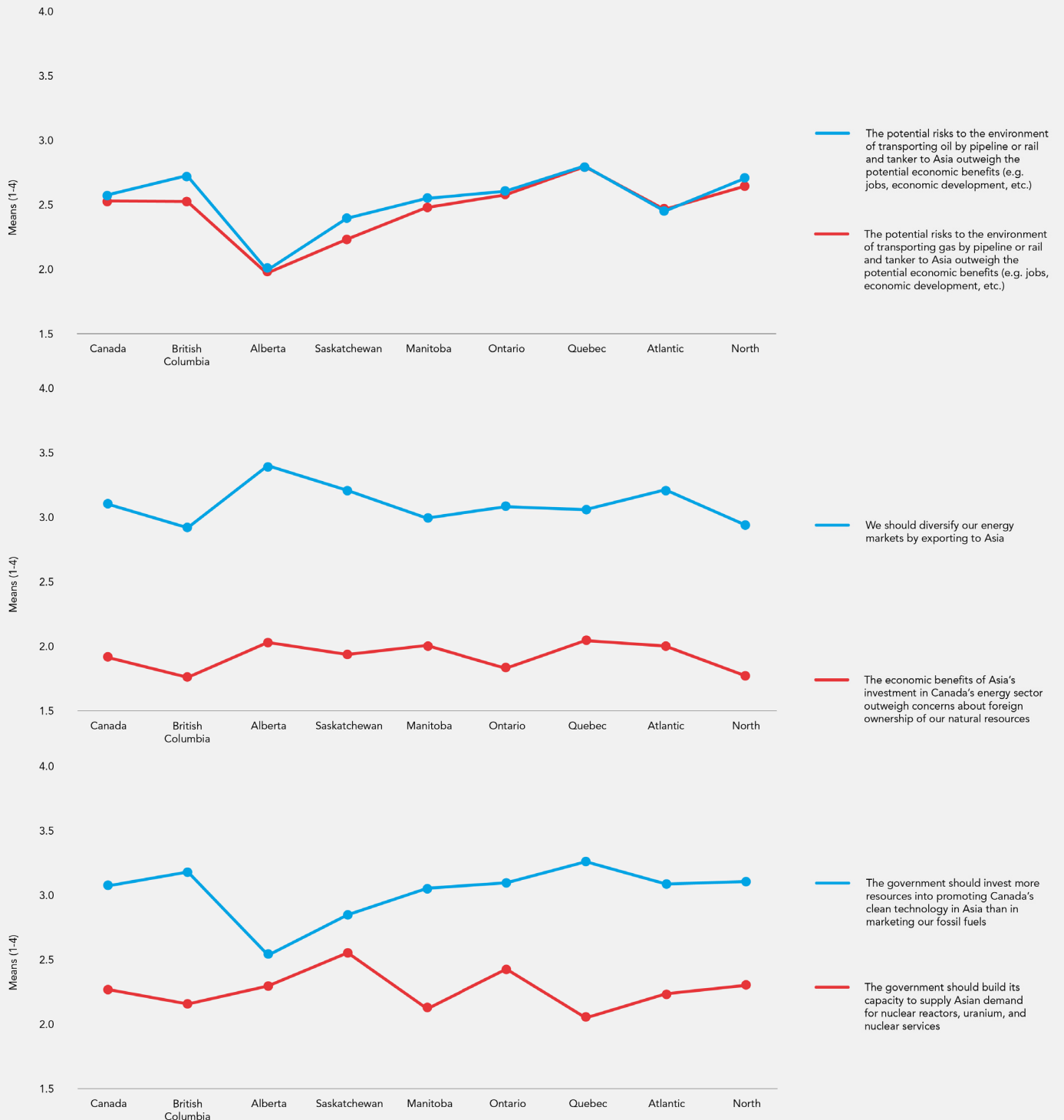


The results also show a regional divide on attitudes toward these issues. To gauge the differences across regions, we compare the average scores of agreement (a four-level scale, with 1 meaning strongly disagree and 4 meaning strongly agree) on each statement across provinces/regions. Alberta and Saskatchewan are more open than other parts of Canada to engaging Asia in the energy sector – they are more likely to support diversifying the energy market and are less concerned about environmental issues; in contrast, British Columbia is more conservative than other provinces/regions as it sees less support for diversification and shows stronger concern about environmental issues.

The idea that the government should promote more clean technology than fossil fuels in Asian markets has gained more support from British Columbia and Quebec, while Alberta is less supportive.

Meanwhile, Saskatchewan and Ontario show stronger interest than other provinces/regions in Canada supplying Asian demand for nuclear energy.

## Canadian provinces/territories have different views on engagement with Asia in the energy sector



Base: Canada (n=3,561); BC (n=441); AB (n=399); SK (n=109); ON (n=1,360); QC (n=831); ATL (n=242); North (n=52)

Q15: Do you agree or disagree with the following statements about Canada's engagement with Asia in the energy sector?

# SECTION 7

## TOURISM AND IMMIGRATION

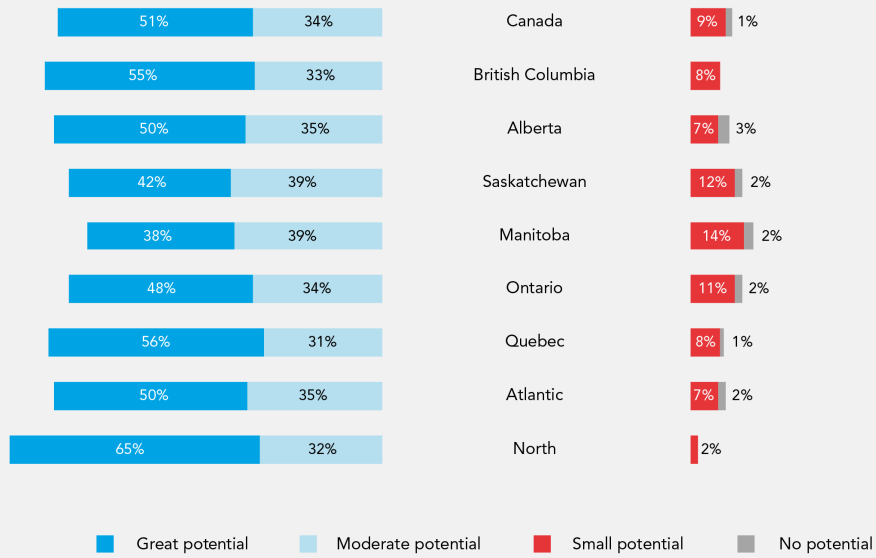
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CANADIANS SEE GREAT POTENTIAL IN ASIAN MARKETS FOR THE CANADIAN TOURISM INDUSTRY AND PERCEIVE AN OVERALL POSITIVE ECONOMIC IMPACT OF ASIAN TOURISTS.

Asia has been an important source of international tourists in Canada, comprising 11% of Canada's total non-resident travellers in 2017 and continuing the upward trend over the past 10 years. China is the largest source country in Asia, sending 694,543 tourists to Canada in 2017. In light of the '2018 Canada-China Year of Tourism,' this poll asked respondents about their perceptions of Asian tourism in Canada.

Over half of Canadians believe Asian markets hold "great potential" for the Canadian tourism industry and 34% say "moderate potential." Residents in the North and Quebec are the most optimistic about Asian markets in tourism, with 65% and 56%, respectively, indicating "great potential" in their responses.

### Canadians tend to see great potential in Asian markets for the Canadian tourism industry



**Base:** Canada (n=3,561); BC (n=441); AB (n=399); SK (n=109); ON (n=1,360); QC (n=831); ATL (n=242); North (n=52)  
**Q16:** Do you think Asian markets hold great potential, moderate potential, small potential or no potential for the Canadian tourism industry?

In line with the optimism in the Asian tourism market, the great majority of Canadians across the country think that tourists from Asia have a positive impact on Canada’s economy.

### Canadians perceive a positive impact from Asian tourists on the Canadian economy

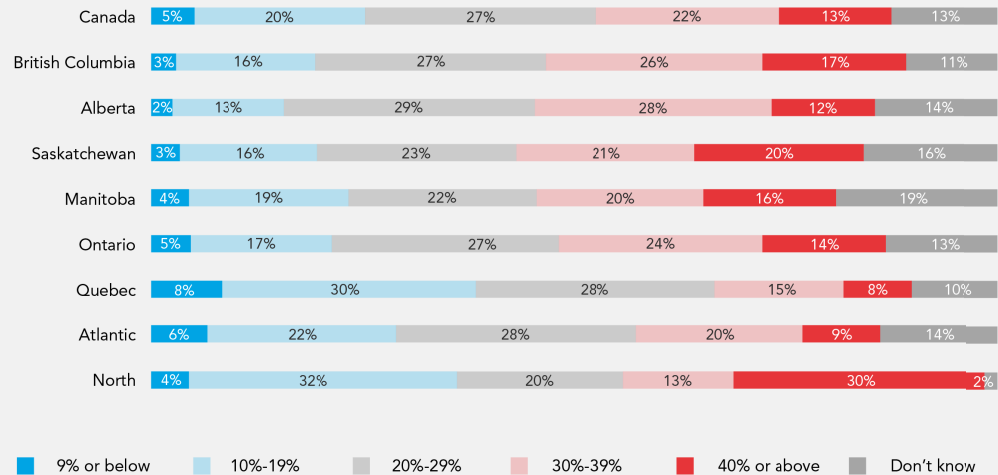


Base: All respondents (n=3,561)

Q18A: Would you say tourists from Asia have an overall positive or negative impact on Canada's economy?

Interestingly, Canadians tend to overestimate the number of Asian tourists in Canada – 62% think that 20% or more of Canada's international tourists came from Asia in 2017, while the official statistic is around 11% (13% if Oceania is included). Residents in the North and Quebec are most likely to have the right estimate – about one-third of these respondents got the correct range.

### Canadians tend to overestimate the share of Asian tourists in Canada



Base: Canada (n=3,561); BC (n=441); AB (n=399); SK (n=109); ON (n=1,360); QC (n=831); ATL (n=242); North (n=52)  
 Q17: Based on your knowledge or perceptions, what percentage of Canada’s international tourists do you think came from Asia in 2017?

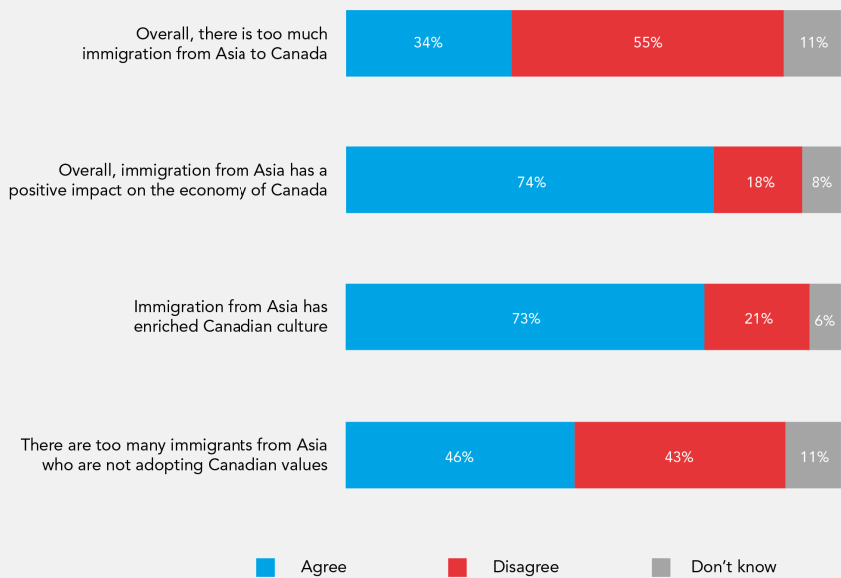
### CANADIANS OVERALL VIEW IMMIGRANTS FROM ASIA POSITIVELY, WITH VARIATIONS ACROSS IMMIGRANT CATEGORIES.

With questions adapted from the [Environics Institute for Survey Research](#), we assessed Canadian perceptions of immigration from Asia. Broadly speaking, Canadians hold positive views on immigration from Asia although some have concerns about immigrants not adopting Canadian values. More than half of Canadians do not think that “there is too much immigration from Asia to Canada,” and the majority recognize positive impacts of Asian immigration on the Canadian economy and culture – 74% share the sentiment that immigration from Asia has a positive impact on the economy and 73% believe it has enriched Canadian culture. However, Canadians are split on how well Asian immigrants adapt to Canadian society – while 46% say “there are too many immigrants from Asia who are not adopting Canadian values,” 43% disagree with this statement.

Public attitudes toward immigration from Asia vary across provinces/regions. British Columbians are the most concerned with too much immigration from Asia (43%) and worry that Asian immigrants are not adopting Canadian values (57%). Albertans are less likely to view Asian immigration in positive terms regarding economic contribution – 25% do not

perceive a positive impact on the Canadian economy. In contrast, Quebecers and Atlantic residents tend to be more open to Asian immigration. A significantly higher percentage of respondents in the two regions (Quebec 64%, Atlantic provinces 59%) disagree that “there is too much immigration from Asia.” Similarly, a lower percentage of Atlantic residents (49%) disagree that “there are too many immigrants from Asia who are not adopting Canadian values.”

### Canadians view Asian immigration in positive terms



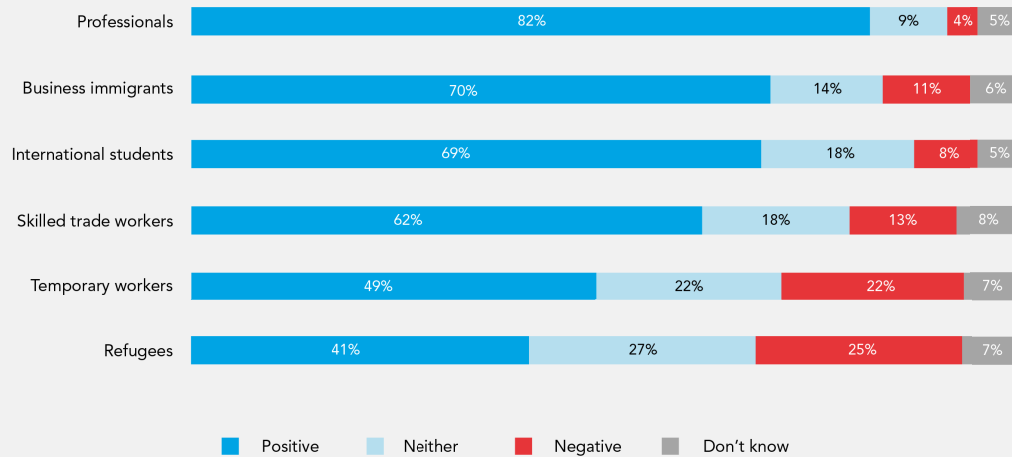
Base: All respondents (n=3,561)

Q19: Do you agree or disagree with each of the following statements about Canada and the global economy?

Regarding immigrant categories, Canadians value professionals most highly – 82% say this group has an overall positive impact on Canada’s economy, followed by business immigrants (70%), international students (69%), and skilled trade workers (62%). Mixed feelings are expressed toward temporary workers and refugees – less than half of Canadians shared positive views toward these categories.

Several provinces/regions stand out in their attitudes to different immigrant categories. Comparing across the country, British Columbians are the most negative about business immigrants (19% negative); Albertans are the most negative about temporary foreign workers (30% negative) and refugees (35% negative); Atlantic provinces are the most positive about professionals (86% positive) and refugees (49% positive); and Quebec is the most open province to foreign temporary workers (59% positive).

### Views on Asian immigrants differ across immigration categories



Base: All respondents (n=3,561)

Q18: Would you say each of the following groups of population in Canada from Asia has an overall positive or negative impact on Canada's economy?



# SECTION 8

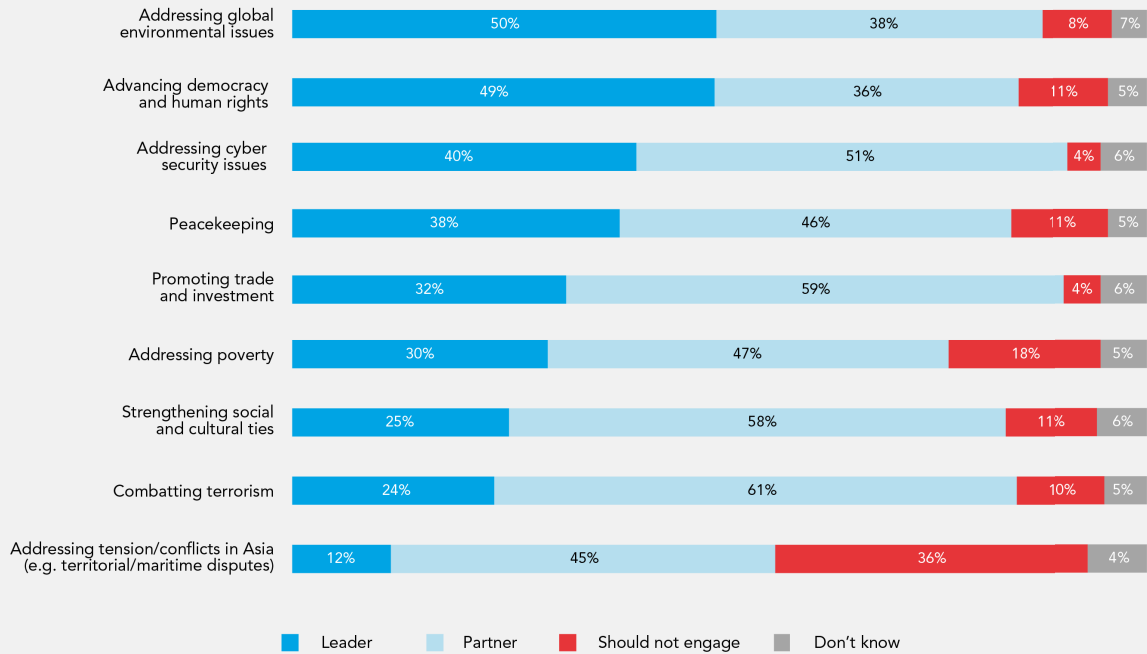
## FOREIGN POLICY

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CANADIANS EXPECT AN ASIA STRATEGY THAT PROTECTS CANADIAN VALUES ABROAD THROUGH LEADING ON ENVIRONMENTAL ISSUES AND PROMOTING DEMOCRACY AND HUMAN RIGHTS IN ASIA.

Canadian perceptions of Canada's role (leader, partner, or not engaged) in a variety of issues pertaining to Canada-Asia relations indicate that the public would welcome an Asia strategy rooted in Canadian values. In engaging with Asia, a large share of Canadians expect the government to play a leading role on environmental issues (50% leader) and promoting democracy and human rights (49% leader); in contrast, they tend to believe the government should partner with other countries on socio-economic issues (i.e. trade and investment, poverty, and social and cultural relationships) and security issues (i.e. cyber security, peace-keeping, and combatting terrorism). Notably, a significant number of Canadians (36%) would not like the government to engage in addressing tensions/conflicts (e.g. territorial/maritime disputes) in Asia.

### Canadians would like the Canadian government to lead on environmental and political issues in engaging Asia



Base: All respondents (n=3,561)

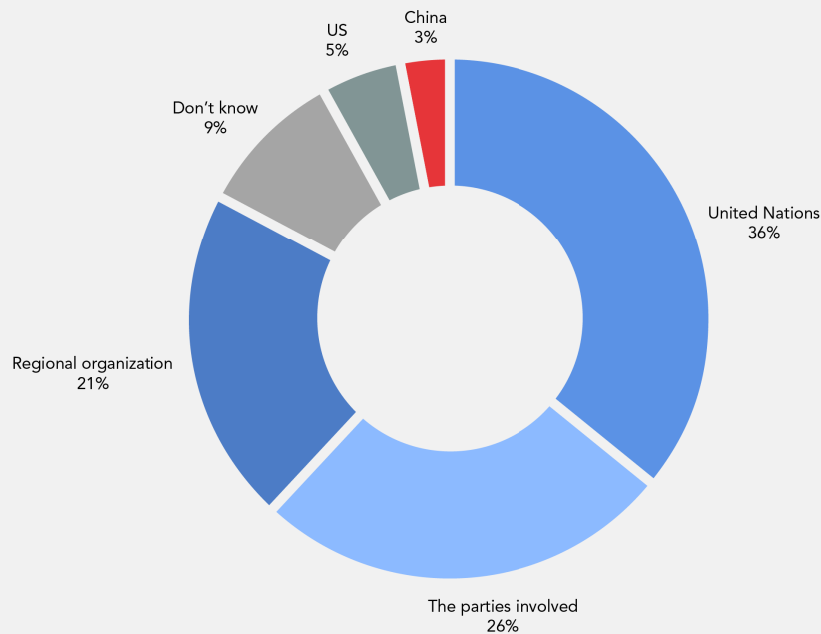
Q20: In its relationship with Asia, do you think Canada should be a leader or a partner in each of the following areas, or Canada should not be engaged?

Public attitudes differ across the country on Canada’s Asia strategies. On promoting trade and investment, Alberta (38% leader) and Atlantic provinces (39% leader) are more willing to see a more proactive government role than other parts of Canada. British Columbia (54% leader) and Quebec (56% leader) are the most receptive, among all provinces/regions, to the government playing a leading role on environmental issues, while Alberta (47% partner) and Saskatchewan (46% partner) are the least receptive. Ontario sees the most widespread support (44% leader) for a leading role of the government in addressing cyber-security issues.

**CANADIANS BELIEVE THE UNITED NATIONS OR A REGIONAL ORGANIZATION SHOULD PLAY A LEADING ROLE IN ADDRESSING REGIONAL SECURITY ISSUES IN ASIA.**

Aligned with the majority view that Canada should be a partner or not engaged in regional tensions/conflicts in Asia, most Canadians believe a multinational organization, such as the United Nations (36%) or a regional organization (21%), should play a leading role in addressing regional security issues in Asia (e.g. territorial/maritime disputes, peacekeeping, nuclear issues).

**The majority of Canadians say a multinational organization should play a leading role in addressing Asia’s regional security issues**



**Base:** All respondents (n=3,561)

**Q22:** In resolving regional security issues in Asia (e.g. territorial/maritime disputes, peacekeeping, nuclear issues, etc.), which of the following do you think should play a leading role?

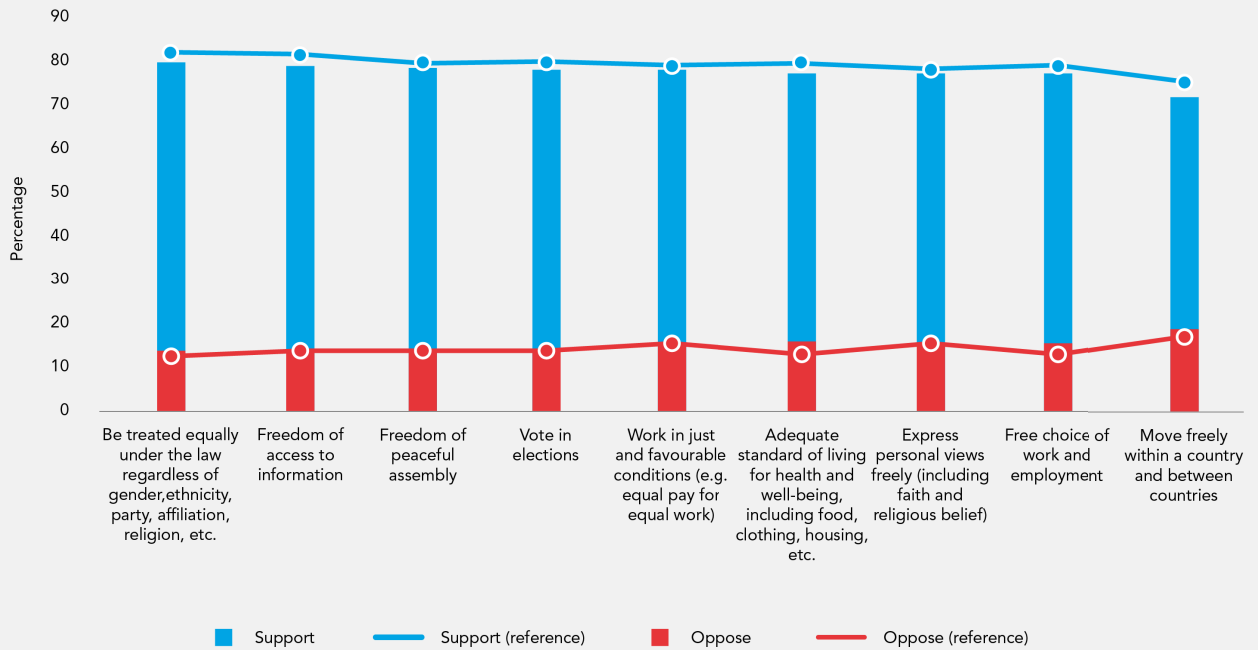
## CANADIANS STRONGLY SUPPORT THE CANADIAN GOVERNMENT PUSHING CHINA TO ADVANCE HUMAN RIGHTS FOR CHINESE CITIZENS.

Canadians' expectation of a value-centric approach to Asia is also reflected in the strong view that the Canadian government should advance human rights in China even though it might interfere with bilateral economic relations.

There has been a public debate in Canada around whether benefits from economic engagement with China outweigh the concern for China's human rights issues. In order to probe how much economic considerations factor into Canadians' views on Canada's approach to China, we conducted a survey experiment. We first split the national sample into two sub-samples that are representative of the Canadian population by region, gender, and age. Subgroup 1 was exposed to a message stating "A Canadian government decision to criticize China's human rights record publicly may lead to a deterioration of economic relations between the two countries" and Subgroup 2 (the reference group) did not see the message. Both groups were then asked the same question: "Do you agree or disagree that the Canadian government should push China to advance the right to ... for its citizens?" This question probed different dimensions of human rights, from political to economic and social rights.

Regardless of their exposure to the message highlighting potential economic consequences, the two subsample groups responded with little difference to the questions. For virtually all dimensions of human rights, the great majority (70% or above) of both groups agree that the Canadian government should push China to advance various rights for Chinese citizens.

### Canadians are strongly supportive of Canada advancing human rights in China



Base: Subgroup 1 (n=1,814); Subgroup 2 (reference) (n=1,747)

Q23: A Canadian government decision to criticize China's human rights record publicly may lead to a deterioration of economic relations between the two countries. Do you agree or disagree that the Canadian government should push China to advance the right to... for its citizens?

These results, however, may not be limited to China – our 2016 NOP revealed that 76% of Canadians agreed that “Canada should raise human rights issues in its relations with Asian countries.” Also aligned with these observations is the strong support for the progressive trade agenda, as revealed earlier. These attitudes combined imply that Canadians overall may be willing to sacrifice economic interest to promote Canadian values abroad. Yet, we should note that attitudes may vary across population groups (e.g. sex, age, education) and regions. This deserves further investigation.

### CANADIANS SUPPORT PROVINCIAL POLICIES TO FURTHER ENGAGE ASIA IN GENERAL, BUT WITH REGIONAL VARIATIONS.

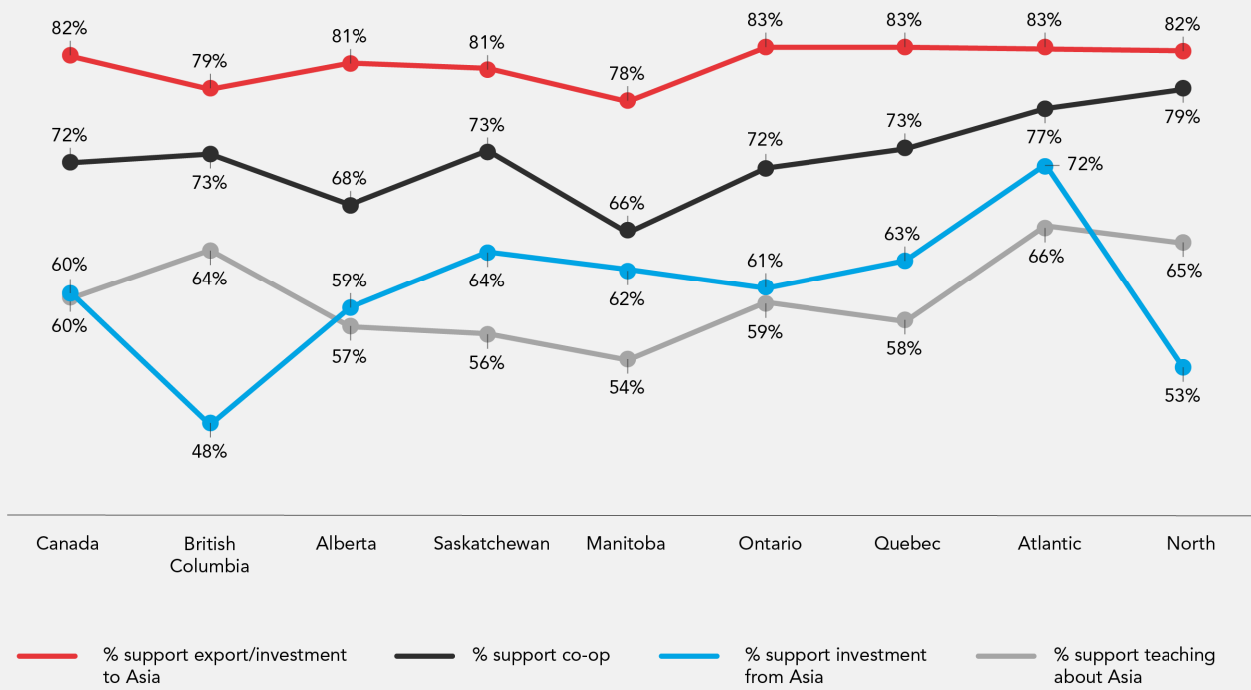
In response to provincial policies to build stronger ties with Asia, Canadians are the most supportive of policies to promote Canadian trade and investment in Asia and student exchange/co-op programs, while policies emphasizing Asian content in the education system and bringing Asian investment into the province are a little less popular. Policies to promote more Canadian investment in and exports to Asia receive support from 82% of the Canadian population, followed by policies to provide more funding for Canadian students to gain grounded experiences in Asia, for example, through exchange or co-op programs (72% support).

Across the country, residents in virtually all provinces/regions strongly support policies to promote Canada's access to Asian markets through trade and investment (around 80% support for all provinces/regions). Support for co-op or exchange programs is widespread as well for most provinces/regions, with Alberta (68%) and Manitoba (66%) having the lowest support.

For most provinces/regions, policies to incorporate teaching about Asia into the provincial education system are not as well supported as the other policies, and the three Prairie provinces see the lowest level of support.

Canadian opinion is most divided on the issue of bringing more investment from Asia to the province. British Columbia, which has seen a large influx of investment from Asia in the past years, has the strongest opposition to having more Asian investment (48% support; 45% oppose), followed by Northern Canada (53% support; 44% oppose) and Alberta (59% support; 45% oppose). In contrast, the Atlantic provinces are the most open to Asian investment with 72% supporting policies in this respect. This is followed by Saskatchewan (64% support) and Quebec (63% support).

### Regions differ in attitudes toward provincial policies to strengthen ties with Asia



Base: Canada (n=3,561); BC (n=441); AB (n=399); SK (n=109); ON (n=1,360); QC (n=831); ATL (n=242); North (n=52)

Q21: Would you support or oppose your provincial government doing each of the following to build stronger ties with Asia? (Encourage more investment from Asian countries in your province; Promote greater Canadian investment in and exports to Asia; Place more emphasis on teaching about Asia in your province’s education system (e.g. language, history, culture, society, etc.); Provide more funding for exchange or co-op programs for Canadian university and college students to gain study or work experiences in Asia)

# CONCLUSION

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OVER THE PAST TWO YEARS SINCE OUR LAST TRADITIONAL LONG-FORM NOP WAS CONCLUDED IN 2016, Canada has seen movement toward greater economic engagement with Asia, including the conclusion of the CPTPP and continued talks with China, India, and ASEAN about free trade agreements. The designation of 2018 as the Canada-China Year of Tourism also signifies an interest in increasing people-to-people exchanges between the two countries. In the meantime, a series of anti-trade and anti-immigration policies pushed by Donald Trump's administration has reinforced Canadians' concerns about the global trend of protectionism and has increased public support for further diversifying Canada's economic relationships. However, questions remain as to whether the overall economic benefits of deepened engagement with Asia will outweigh perceived threats to Canadian values. This poll examines public opinion on these issues and tracks the changes, if any, in Canadian views over time, especially given the global dynamics and shifts over the past two years.

In this poll, we continue to see growing optimism about Asia and engagement with Asia despite varying attitudes toward different economies. Canadians' identification with the Asia Pacific region has strengthened, and feelings toward most Asian countries have warmed up. The importance of Asian markets, especially China and India, to Canada's economic well-being has become increasingly pronounced to Canadians. Consequently, there is strong support for initiatives to improve economic relationships (including FTAs) with Asia and to promote Asia competency through public education and exchange programs.

Despite the widespread optimism, Canadians are not free of concerns, especially when it comes to the influx of investment from Asia and possible foreign threats to Canadian values as they relate to the environment, democracy, and human rights. These concerns are evident in the public responses to investment from China and their ambivalent attitudes toward engagement in the energy sector.

Against this backdrop, it is perhaps not surprising that Canadians would welcome an Asia strategy that promotes Canadian values at home and abroad while pursuing improved economic benefits. As the poll further reveals, Canadians would appreciate the progressive agenda in trade relationships with Asian economies and believe Canada should take a leading role in addressing environmental issues and promoting democracy and human rights in Asia through foreign policies.



# METHODOLOGY



THE ASIA PACIFIC FOUNDATION OF CANADA COMMISSIONED EKOS RESEARCH ASSOCIATES to conduct a survey of 3,561 Canadian adults (permanent residents and citizens 18 years and older). The survey was conducted from February 28 to March 16, 2018, using EKOS's research panel, Probit. This panel offers coverage of the Canadian population accessible through Internet, phone or cellphone. A random stratified sample for this study was drawn from the panel database using random digit dialling. All data was collected online.

The margin of error – which measures sampling variability – is +/- 1.64% for the entire sample. The average completion time for the survey was 19 minutes. The results have been statistically weighted by EKOS according to the current census data on age, gender, and region to ensure the representativeness of the sample. Discrepancies in or between totals are due to rounding.

