

Impressions of Canadians on Canada's relationship with China

National survey released June, 2017

Project 2017-1039

THE GLOBE AND MAIL[®] 

 NANOS SURVEY



Canadians see China and Russia as top security threats; support for trade with China up

A significant majority of Canadians oppose the sale of Canadian companies with military customers to Chinese investors. Almost two fifths say that purchases of Canadian companies by Chinese ones should be the top priority for national security reviews. Most Canadians think the relationship between the Canadian and Chinese governments is about right in term of friendliness, and more than half of Canadians support or somewhat support a free trade deal with China.

- **Two fifths of Canadians say purchases of Canadian companies by Chinese companies should be a top priority for national security reviews** – Asked which companies should be a top priority for national security reviews to protect Canada's security interests, 39 per cent say companies from China, followed by 26 per cent who say companies from Russia, nine per cent say companies from the United States, five per cent say companies from the United Kingdom, three per cent say German companies and one per cent say Japanese companies. Seventeen per cent are unsure.
- **More than half of Canadians think the level of friendliness between the Canadian and Chinese governments is about right** – Over half of Canadians (54%) say the level of friendliness between the Canadian and Chinese governments is about right, while a quarter (25%) say too friendly and six per cent say not friendly enough. Fifteen per cent are unsure.
- **More than half of Canadians support or somewhat support a free trade deal with China** – Just over half of Canadians support (17%) or somewhat support (37%) a free trade deal with China, while just under two fifths say they somewhat oppose (21%) or oppose (16%) such a deal. Nine per cent are unsure. There is a marginally positive shift in opinion compared to the 2016 numbers (11% support, 30% somewhat support); however Canadians are still divided on support for a free trade deal with China.
- **Almost four fifths of Canadians oppose or somewhat oppose allowing a Chinese firm to buy a Montreal laser company** – Asked about their support for allowing a Chinese firm partially owned by the Chinese Government to buy a Montreal laser technology company even though some have warned that it will give China the same technology that our military uses, almost half (49%) of Canadians oppose this decision, while 29 per cent somewhat oppose, 13 per cent somewhat support, four per cent support and seven per cent are unsure.
- **Almost four fifths of Canadians oppose or somewhat oppose allowing a Chinese investor to buy a Vancouver satellite company** – Nearly four fifths of Canadians oppose (48%) or somewhat oppose (28%) the decision to approve the purchase of a Vancouver satellite tech company with major military customers in Canada and the U.S. to a Chinese investor, while 14 per cent support and four per cent somewhat support this decision. Seven per cent are unsure.

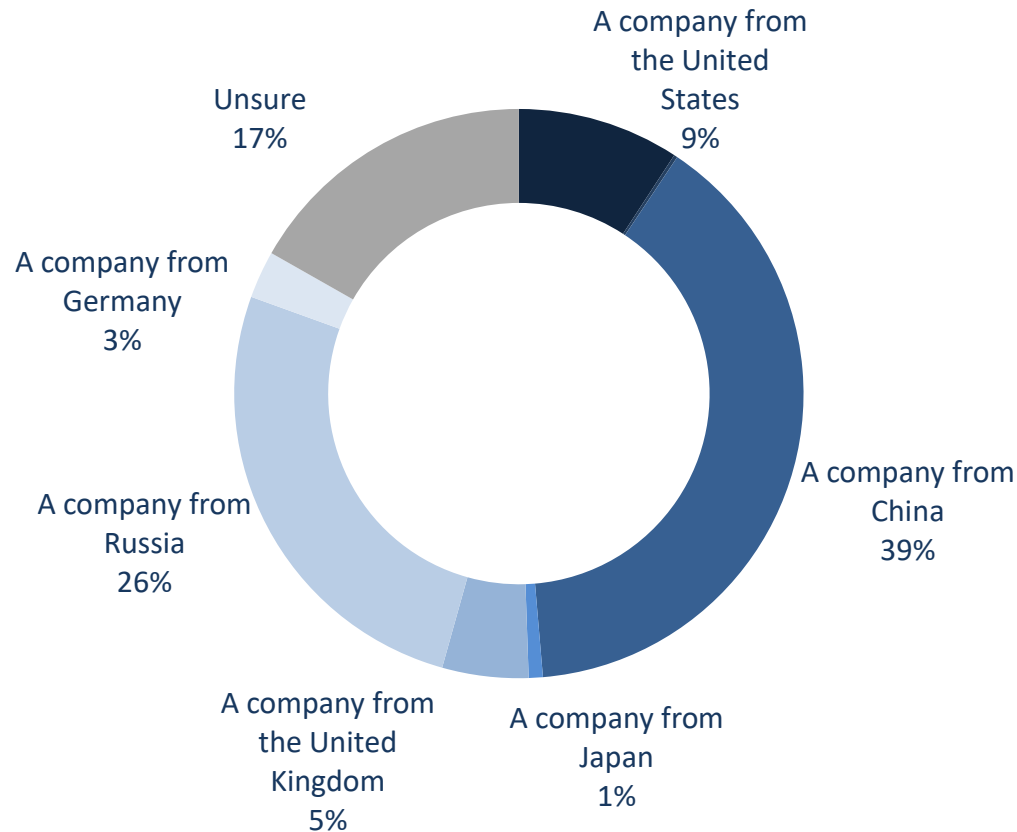
These observations are based on a Nanos RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, conducted between June 24th to 27th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.



Top priority for national security reviews

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



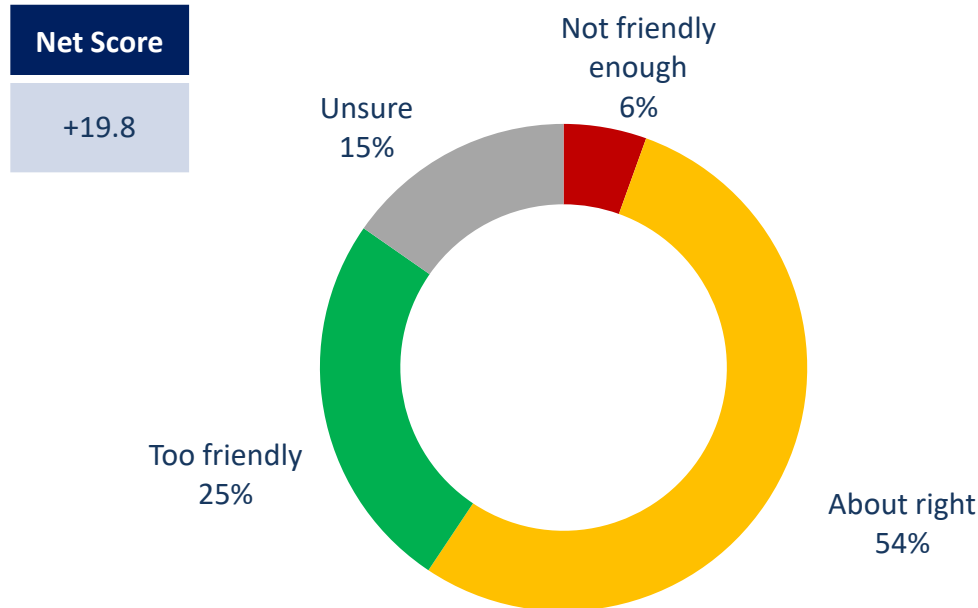
Subgroups	A company from China
Atlantic (n=100)	24.9%
Quebec (n=250)	39.9%
Ontario (n=300)	41.0%
Prairies (n=200)	42.7%
British Columbia (n=150)	39.9%
Male (n=511)	43.2%
Female (n=489)	35.6%
18 to 29 (n=159)	34.9%
30 to 39 (n=150)	37.4%
40 to 49 (n=179)	38.4%
50 to 59 (n=191)	39.6%
60 plus (n=321)	44.0%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – If a Canadian company is being purchased by a company in a foreign country, which of the following companies should be the top priority for national security reviews to protect Canada’s security interests? [RANDOMIZE]

Canadian-Chinese government relationship

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



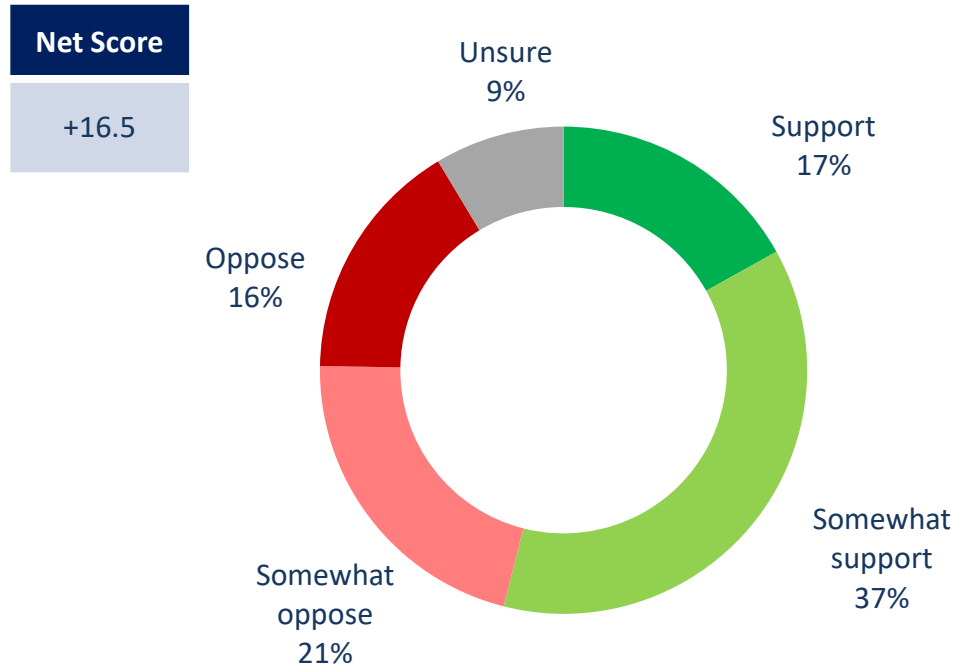
Subgroups	About right
Atlantic (n=100)	52.6%
Quebec (n=250)	59.7%
Ontario (n=300)	53.5%
Prairies (n=200)	45.5%
British Columbia (n=150)	56.5%
Male (n=511)	56.2%
Female (n=489)	51.6%
18 to 29 (n=159)	46.3%
30 to 39 (n=150)	50.7%
40 to 49 (n=179)	53.8%
50 to 59 (n=191)	56.5%
60 plus (n=321)	59.4%

***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you think that the relationship between the Government of Canada and the Government of China today is not friendly enough, about right in terms of friendliness or too friendly?

Level of support for free trade deal with China

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



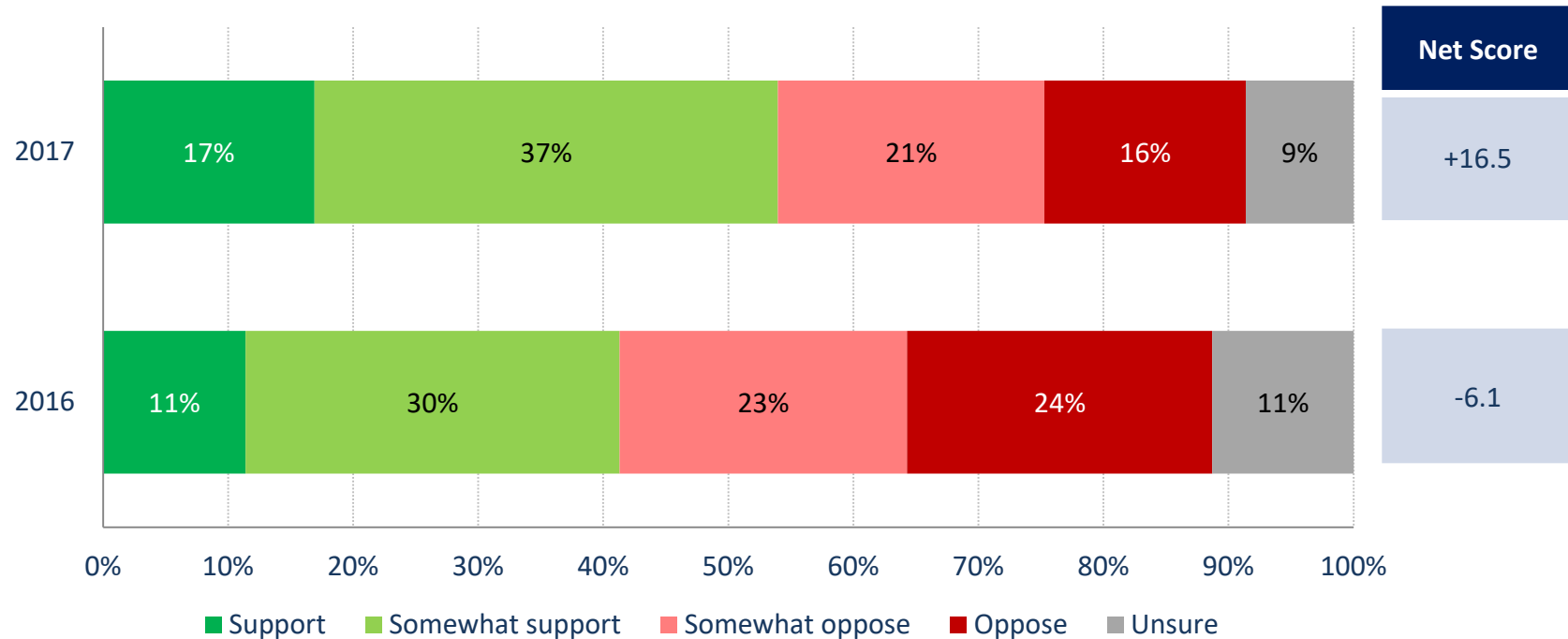
***Note: Charts may not add up to 100 due to rounding**

Subgroups	Support/ Somewhat support
Atlantic (n=100)	64.9%
Quebec (n=250)	53.8%
Ontario (n=300)	57.1%
Prairies (n=200)	48.5%
British Columbia (n=150)	47.7%
Male (n=511)	57.8%
Female (n=489)	50.3%
18 to 29 (n=159)	54.6%
30 to 39 (n=150)	49.0%
40 to 49 (n=179)	53.8%
50 to 59 (n=191)	51.7%
60 plus (n=321)	58.3%

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the federal government pursuing a free trade deal with China?

Level of support for free trade deal with China

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, January 30th to February 1st, 2016, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

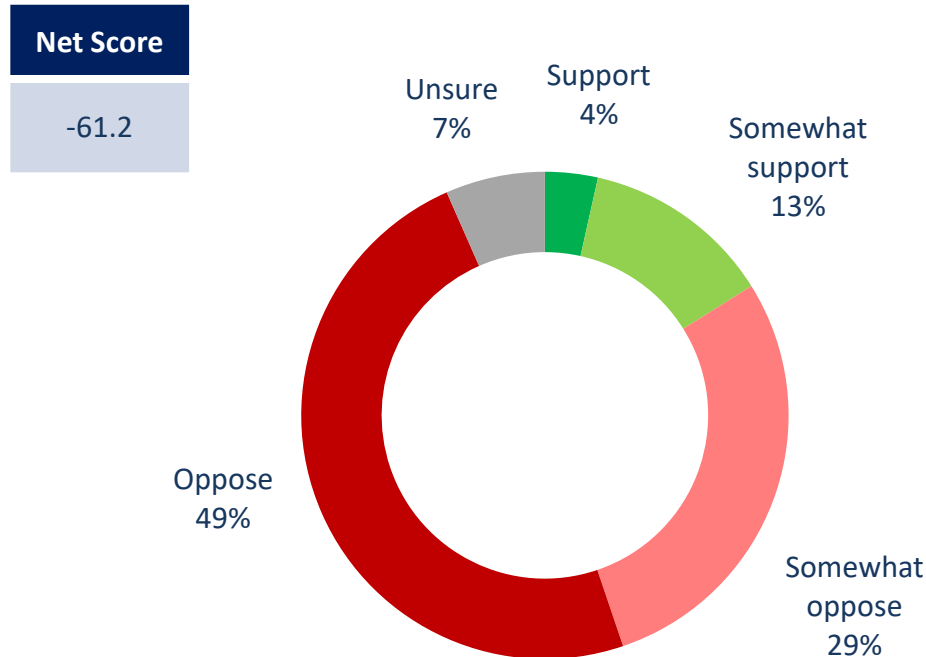


***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the federal government pursuing a free trade deal with China?

Allowing Chinese firm to buy Montreal company

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Oppose/ Somewhat oppose
Atlantic (n=100)	76.2%
Quebec (n=250)	73.0%
Ontario (n=300)	76.0%
Prairies (n=200)	80.6%
British Columbia (n=150)	83.7%
Male (n=511)	77.7%
Female (n=489)	77.0%
18 to 29 (n=159)	75.2%
30 to 39 (n=150)	70.7%
40 to 49 (n=179)	82.1%
50 to 59 (n=191)	79.3%
60 plus (n=321)	78.3%

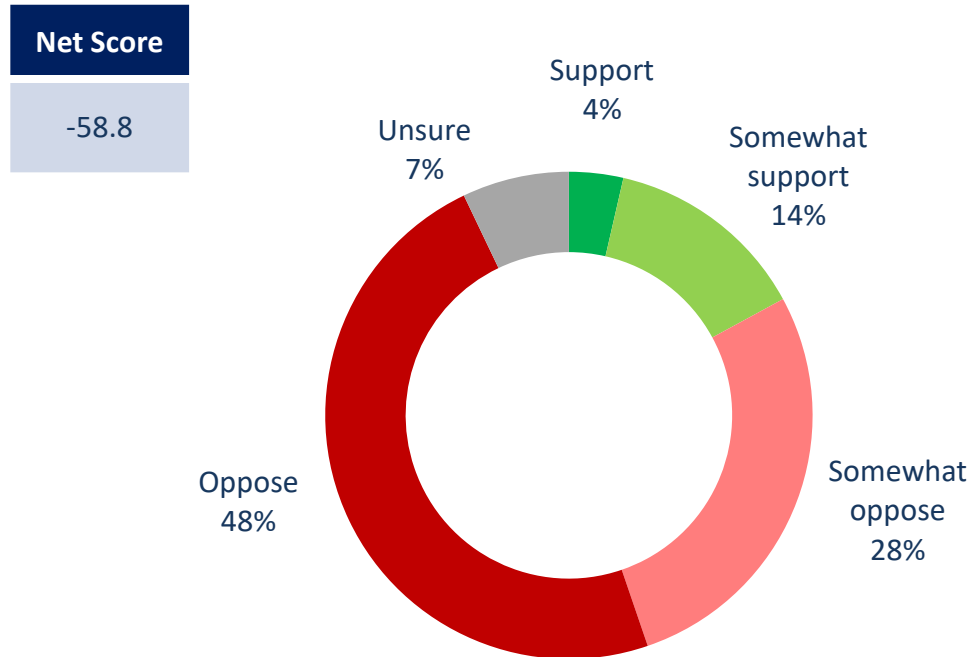
***Note:** Charts may not add up to 100 due to rounding

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following decisions? [ROTATE]

The decision to allow a Chinese firm that is partially owned by the Government of China to buy a Montreal laser technology company even though some have warned that it will give China the same technology that our military uses

Allowing Chinese investor to buy Vancouver firm

Source: The Globe and Mail/Nanos Research, RDD dual frame hybrid telephone and online random survey, June 24th to 27th, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



***Note:** Charts may not add up to 100 due to rounding

Subgroups	Oppose/ Somewhat oppose
Atlantic (n=100)	67.0%
Quebec (n=250)	74.0%
Ontario (n=300)	75.7%
Prairies (n=200)	79.0%
British Columbia (n=150)	80.7%
Male (n=511)	77.4%
Female (n=489)	74.4%
18 to 29 (n=159)	74.4%
30 to 39 (n=150)	69.5%
40 to 49 (n=179)	78.6%
50 to 59 (n=191)	77.6%
60 plus (n=321)	77.7%

QUESTION – Do you support, somewhat support, somewhat oppose or oppose the following decisions? [ROTATE]

The decision to approve the purchase of a Vancouver satellite tech company with major military customers in Canada and the U.S. to a Chinese investor



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th to 27th, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The sample included both land- and cell-lines across Canada. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The data presented in this research is part of a joint project by The Globe and Mail and Nanos Research.

Note: Charts may not add up to 100 due to rounding.

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Globe and Mail	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1,000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell line could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	Thirteen percent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Demographics (Other)	Age, gender, education, income	Question Content	This was module three of an omnibus survey. Preceding modules asked about unprompted top issues of national concern, Canada's 150 celebration and NAFTA.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Number of Calls/	Maximum of five call backs.	Survey Company	Nanos Research
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Field Dates	June 24 th to 27 th , 2017.		
Language of Survey	The survey was conducted in both English and French.		

About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



Tabulations

2017-1039 – Globe and Mail/Nanos Survey – Canada/China Relationship - STAT SHEET

			Region						Gender		Age				
			Canada	Atlantic	British				Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
			2017-05	Canada	Quebec	Ontario	Prairies	Columbia							
Question - If a Canadian company is being purchased by a company in a foreign country, which of the following companies should be the top priority for national security reviews to protect Canada's security interests? [RANDOMIZE]	Total	Unwgt N	1000	100	250	300	200	150	511	489	159	150	179	191	321
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	A company from the United States	%	9.2	4.1	8.0	11.7	8.7	9.9	11.5	6.9	12.9	6.5	8.3	10.3	7.8
	A company from Mexico	%	.2	.0	.0	.5	.3	.0	.3	.2	.0	.0	.0	.8	.2
	A company from China	%	39.3	24.9	39.9	41.0	42.7	39.9	43.2	35.6	34.9	37.4	38.4	39.6	44.0
	A company from Japan	%	.8	.6	1.6	.9	.0	.6	1.2	.5	1.9	.8	.0	.9	.5
	A company from the United Kingdom	%	4.9	5.0	2.9	4.7	7.7	5.1	3.6	6.2	4.2	3.9	5.0	5.8	5.5
	A company from Russia	%	26.2	38.5	25.9	23.3	25.1	25.3	25.9	26.4	25.1	28.5	25.1	27.1	25.6
	A company from Germany	%	2.7	4.4	1.7	3.6	2.0	2.0	2.7	2.6	4.8	4.0	2.5	.0	2.2
	Unsure	%	16.8	22.6	20.0	14.2	13.3	17.2	11.6	21.7	16.1	18.8	20.6	15.5	14.1

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 27th, 2017. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

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			Region					Gender		Age					
			Canada	Atlantic	British										
			2017-05	Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Do you think that the relationship between the Government of Canada and the Government of China today is not friendly enough, about right in terms of friendliness or too friendly?	Total	Unwgt N	1000	100	250	300	200	150	511	489	159	150	179	191	321
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Not friendly enough	%	5.5	11.0	5.3	4.6	5.2	4.7	5.7	5.4	7.2	4.1	5.2	5.7	5.3
	About right	%	53.8	52.6	59.7	53.5	45.5	56.5	56.2	51.6	46.3	50.7	53.8	56.5	59.4
	Too friendly	%	25.3	14.3	19.5	27.9	32.1	28.2	28.6	22.3	28.4	24.6	25.3	23.4	24.9
	Unsure	%	15.3	22.0	15.5	14.0	17.2	10.6	9.5	20.8	18.1	20.6	15.6	14.4	10.4

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			Region					Gender		Age					
			Canada	Atlantic			British								
			2017-05	Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - Do you support, somewhat support, somewhat oppose or oppose the federal government pursuing a free trade deal with China?	Total	Unwgt N	1000	100	250	300	200	150	511	489	159	150	179	191	321
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Support	%	16.9	22.0	16.2	16.4	15.6	17.5	21.0	13.0	18.8	16.4	17.5	13.6	17.8
	Somewhat support	%	37.0	42.9	37.6	40.7	32.9	30.2	36.8	37.3	35.8	32.6	36.3	38.1	40.5
	Somewhat oppose	%	21.3	14.6	21.3	22.0	23.5	21.5	20.0	22.5	23.8	24.7	19.2	22.8	17.9
	Oppose	%	16.1	9.3	12.8	16.1	18.7	23.0	17.0	15.3	9.9	18.8	18.1	16.7	17.5
	Unsure	%	8.6	11.2	12.1	4.8	9.2	7.8	5.1	11.9	11.9	7.5	9.0	8.8	6.4

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2017-1039 – Globe and Mail/Nanos Survey – Canada/China Relationship - STAT SHEET

Since taking office, the Trudeau government has made a number of decisions that would allow companies from China to invest in a number of Canadian industrial sectors. Do you support, somewhat support, somewhat oppose or oppose the following decisions? [ROTATE]

			Region						Gender		Age				
			Canada		Atlantic		British								
			2017-05	Canada	Quebec	Ontario	Prairies	Columbia	Male	Female	18 to 29	30 to 39	40 to 49	50 to 59	60 plus
Question - The decision to allow a Chinese firm that is partially owned by the Government of China to buy a Montreal laser technology company even though some have warned that it will give China the same technology that our military uses	Total	Unwgt N	1000	100	250	300	200	150	511	489	159	150	179	191	321
		Wgt N	1000	100	250	300	200	150	487	513	197	163	187	189	265
	Support	%	3.5	2.0	5.5	2.4	2.8	3.9	3.5	3.4	3.9	3.7	1.7	3.8	4.0
	Somewhat support	%	12.6	12.3	15.4	13.9	9.7	9.4	15.2	10.2	14.7	16.6	10.1	10.7	11.8
	Somewhat oppose	%	28.7	34.5	29.8	28.5	23.9	29.8	28.2	29.2	30.1	25.0	28.4	29.4	29.6
	Oppose	%	48.6	41.7	43.2	47.5	56.7	53.9	49.5	47.8	45.1	45.7	53.7	49.9	48.7
	Unsure	%	6.6	9.5	6.1	7.6	6.9	2.9	3.6	9.4	6.3	8.9	6.1	6.2	6.0

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	Support	%	3.6	3.9	6.0	1.8	2.0	4.9	4.1	3.0	3.5	4.6	2.1	3.5	4.0
	Somewhat support	%	13.5	15.3	13.2	16.3	10.7	10.8	14.6	12.4	15.1	18.0	13.3	10.2	12.0
	Somewhat oppose	%	27.7	26.8	32.7	27.6	23.0	26.1	26.3	29.0	33.1	24.8	26.9	26.8	26.6
	Oppose	%	48.2	40.2	41.3	48.1	56.0	54.6	51.1	45.4	41.3	44.7	51.7	50.8	51.1
	Unsure	%	7.1	13.9	6.8	6.1	8.3	3.6	4.0	10.1	7.0	8.0	6.1	8.8	6.3

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between June 24th and 27th, 2017. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

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