



## Asia in the Age of Uncertainty

### Public Opinion in the Asia Pacific Results of 2016 Multinational Survey

January 2017

#### Executive Summary

With rapidly evolving developments both within Northeast Asia and across a range of trans-Pacific relations more broadly, the countries of the region are encountering an increasingly demanding security environment. North Korea's nuclear program, Chinese assertiveness in the South China Sea, and territorial disputes between many of the key regional actors all contribute to an uncertain and unstable regional security outlook. At the same time, these Asia-Pacific nations face some common global challenges, including climate change, terrorism, and nuclear proliferation. Countries in and around the region must carefully balance national challenges with regional interests.

Against this backdrop, the Chicago Council on Global Affairs partnered with the Lowy Institute (Australia), the Asia Pacific Foundation (Canada), Dataway Horizon (China), Genron NPO (Japan), and the East Asia Institute (South Korea) to conduct a regional public opinion poll based on varying sets of shared questions in each country. The goal is to better understand how the publics of each country view the changes taking place in the Asia-Pacific, and to better understand mutual concerns and competing visions in hopes of creating better-informed policy decisions.

It is important to note that all surveys in this report were conducted in 2016 prior to the election of Donald Trump as the president of the United States. His first few weeks have proven controversial, and may very well have shifted some of the findings in this poll. However, this underlines the importance of continuing to conduct multilateral polls in the region to monitor how public opinion has shifted at a time of increased uncertainty in the region and around the world.

## Key Findings

Much discussion in the Asia-Pacific centers on the rise of China and the response of the United States. As the regional survey results make clear, countries around the Asia-Pacific feel the pull of both American and Chinese influence.

- While Americans and Australians see the US as more influential than China, Chinese see the two nations as roughly equal in terms of global influence.
- The United States is widely viewed as more militarily powerful than China, with majorities of Americans (50%), Chinese (54%), and Japanese (78%)—and a plurality of Australians (43%)—naming the US the stronger military power.
- There is less consensus on American economic power. Chinese (51%) and Japanese (61%) publics say the US is stronger than China economically, but Americans (38%) and Australians (40%) tend to say China's economy is stronger. This sense of economic insecurity, exacerbated by anti-China rhetoric from the incoming administration, could alter American views of other aspects of the Sino-American relationship.

Despite the evolving competition for regional influence between the US and China, publics around the Asia-Pacific see their bilateral relationships as generally stable or improving—though there are several important exceptions.

Americans largely see their relationships around the region as stable, with majorities saying US relations with Australia (75%), Canada (69%), and South Korea (58%) are staying about the same, and a plurality (46%) say the same about Sino-American relations.

Matching those views, relatively few respondents in any country polled say that their relations with the United States are worsening. Majorities of Australians (68%), Chinese (61%), and South Koreans (60%), and a plurality of Canadians (39%), say that relations with the US are staying about the same.

Views from around the Asia-Pacific are also fairly optimistic in assessing the respective countries' bilateral relationship with China. Pluralities in Canada (46%) and Australia (49%) say that relations are staying about the same, and a plurality of South Koreans (48%) say that relations with China are improving.

Along with expressing warm feelings toward countries in the region, majorities of the Chinese public say that relations are staying about the same with the United States (61%), Canada (63%), and Australia (62%). A plurality (45%) say that relations are stable with South Korea, though one in three (34%) say relations are worsening. And, concerning regional relations, an outright majority of Chinese say relations with Japan are worsening (55%).

There is also a general agreement on the top threats facing the countries of the Asia-Pacific. Majorities or pluralities see international terrorism as a critical threat to their respective nations, and say that combating it is a very important goal for their countries' foreign policy. North Korea's nuclear program also raises concerns around the region, as does the broader concern of unfriendly countries becoming nuclear powers.

Finally, while the fate of the Trans-Pacific Partnership trade agreement (TPP) is unclear following US withdrawal from the agreement, the reason for its potential demise will not be the absence of public support around the region. Majorities or pluralities support the TPP in the United States (60%), Australia (47%), Japan (46%), and Canada (44%). A large majority of South Koreans (85%)

also support entering the deal, though South Korea was not a part of the TPP negotiations. The only public opposed to the TPP in the region was China's, with a majority (51%) opposed.

## **Introduction**

This year's report highlights that publics from around the Pacific share similar views on a host of common challenges. International terrorism and climate change are common concerns for all. But on security matters and immigration, the poll reveals that views differ significantly on some of the Asia-Pacific's most important developments. Understanding these views will be critical as the countries work towards addressing these challenges.

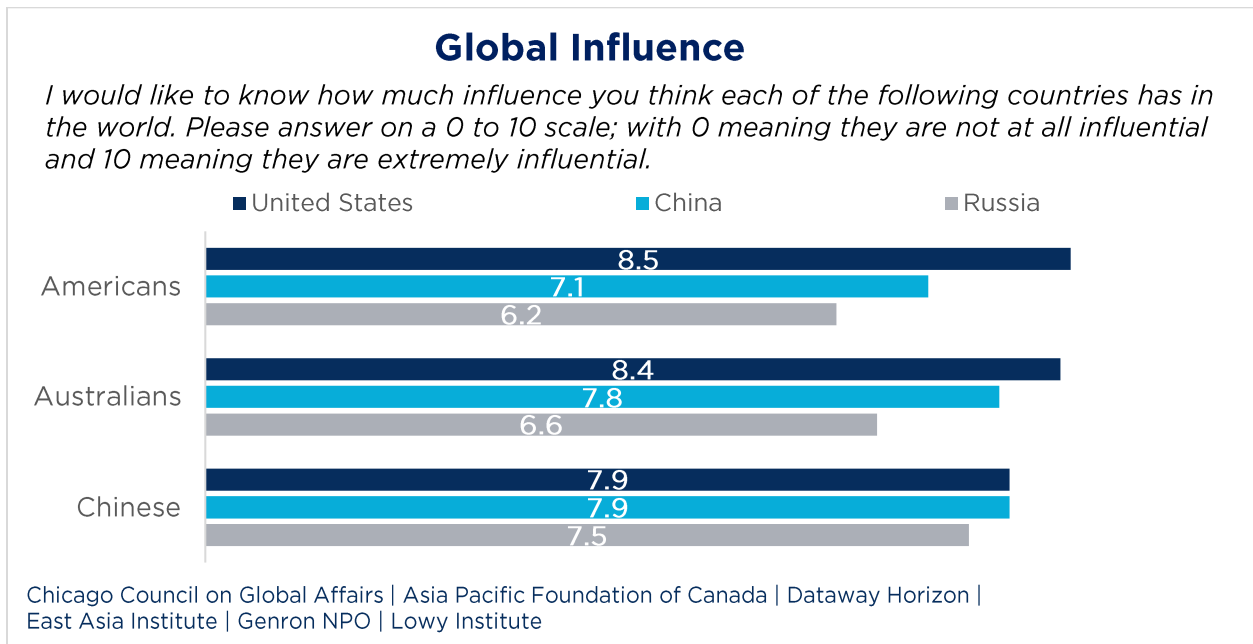
In this year's survey, not all of the same questions were asked in each country. The poll comprised a mix of shared questions across all countries, together with individualized questions designed to draw out the implications of the unique circumstances prevailing in each partner country. This allows for more nuanced readings of the data, as well as a better understanding of the region as a whole.

## **Global Influence**

The rise of China continues to affect all of the countries included in the survey. Its economic influence has touched every country, and as its wealth has grown so too has its global influence. Perceptions of that influence around the world are important to track, as they may provide clues on how publics in various countries not only view themselves, but also how they view the dynamics in the region. This is particularly important in the context of China's rise and the continuing uncertainty around the future role of the United States in the region.

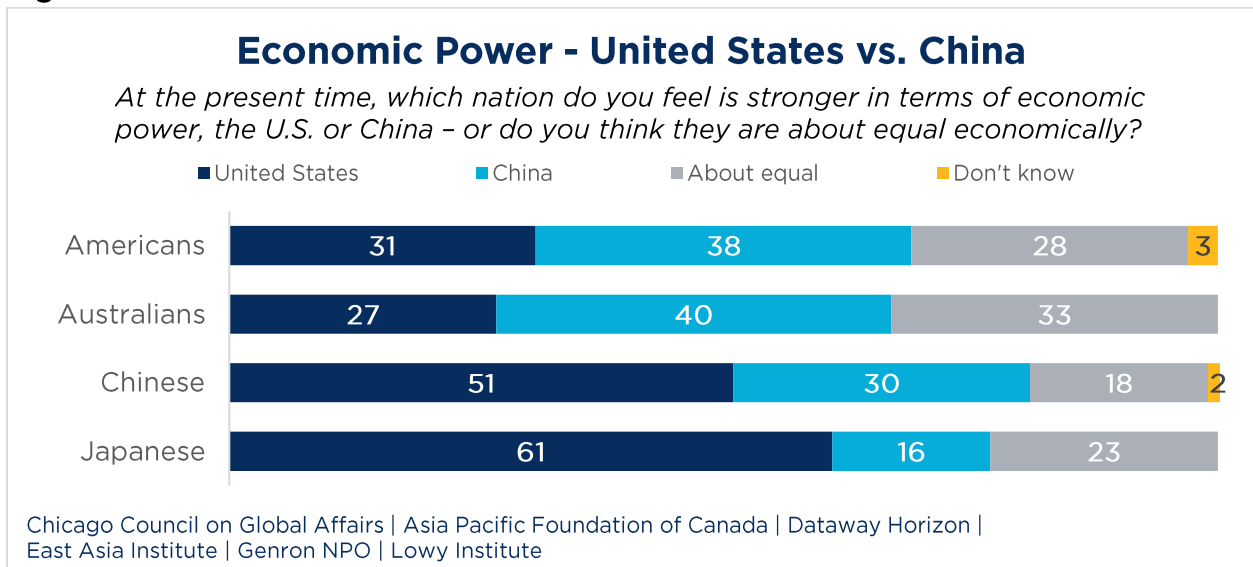
To this end, Americans, Australians, and Chinese were asked about the perceived global influence of a number of countries. For both Americans and Australians, the United States is viewed as the most influential country in the world, with Americans giving the US an average score of 8.5 out of 10, and Australians rating the US an average of 8.4. However, Chinese see China as rivaling the United States in influence, with both nations averaging 7.9 out of 10. For respondents in all countries, Russia is viewed as the least influential of these three, though Chinese rate it more highly than do Americans or Australians.

**Figure 1**



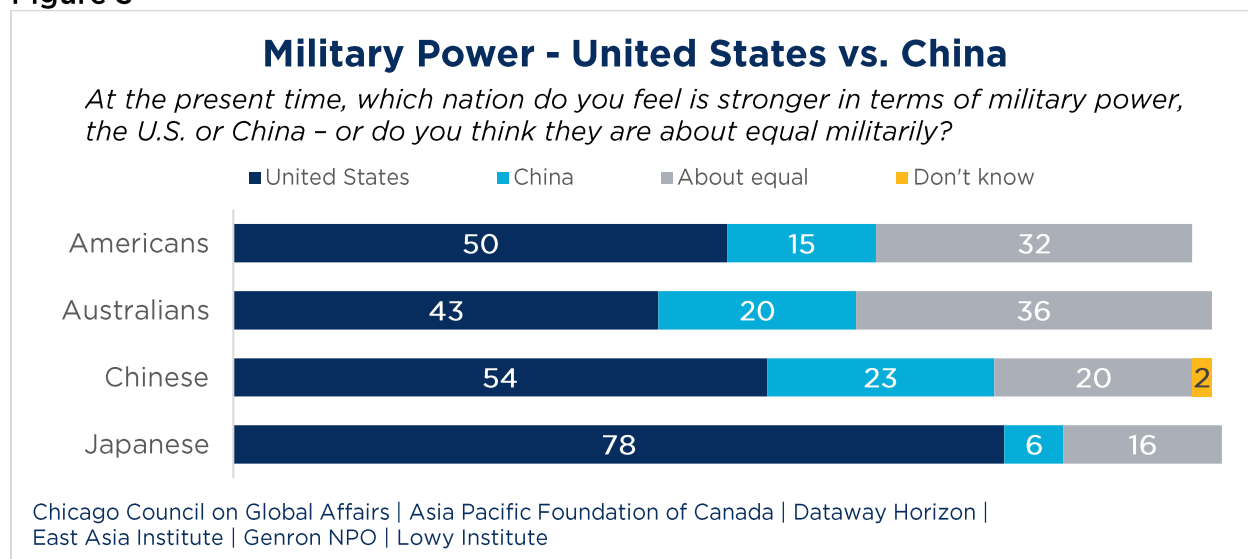
One key ingredient in China’s global influence is its economic power. However, publics diverge significantly when it comes to perceptions of that power vis-à-vis the United States. Among Chinese (51%) and Japanese (61%) respondents, majorities state that the United States remains stronger in terms of economic power. But Americans and Australians see things differently: a plurality in both countries think that China is now stronger than the United States in terms of its economy.

**Figure 2**



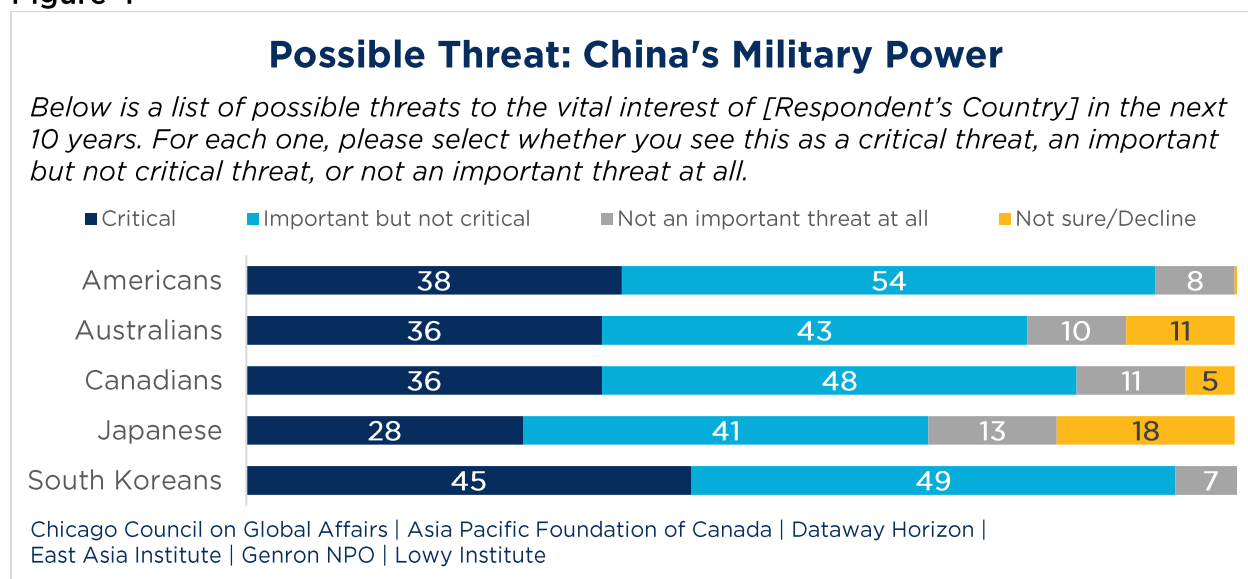
While Americans are skeptical of their own economic power compared to China, they are notably more confident in their military. Half of Americans (50%) say that the US is stronger in terms of military power than China. A majority of Chinese (54%) agree, as do a plurality of Australians (43%). Japanese are, again, the biggest believers in US power, with eight in ten (78%) saying that the US is the stronger military power.

**Figure 3**



Across the region, countries do not see China’s military power as a critical threat. While 45 percent of South Koreans cite China’s military power as a critical threat, just over one-third of those in other countries agree. While other polling in Japan<sup>1</sup> has found that the Japanese public sees China’s military as a threat, results here suggest that it is not yet seen as one that is critical.

**Figure 4**



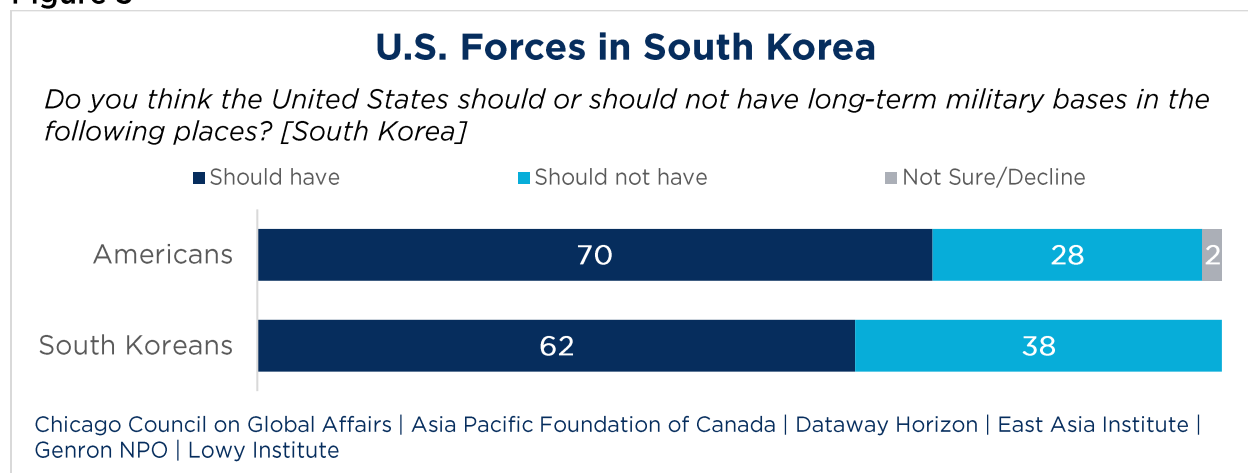
<sup>1</sup> For more on this poll, see “The 12<sup>th</sup> Japan-China Joint Opinion Poll Analysis Report on the Comparative Data”, available at [http://www.genron-npo.net/en/opinion\\_polls/archives/5318.html](http://www.genron-npo.net/en/opinion_polls/archives/5318.html)

## US Forces in the Region

The presence of significant US military forces in the Asia-Pacific may be another reason publics in the Asia-Pacific do not view Chinese military power as a critical threat. But the US military presence in the region is not without controversy, both in the United States and in its host nations, where US basing policy is a frequent domestic political flashpoint. This year, the question was asked in two of those countries—South Korea and Australia—as well as in the United States.

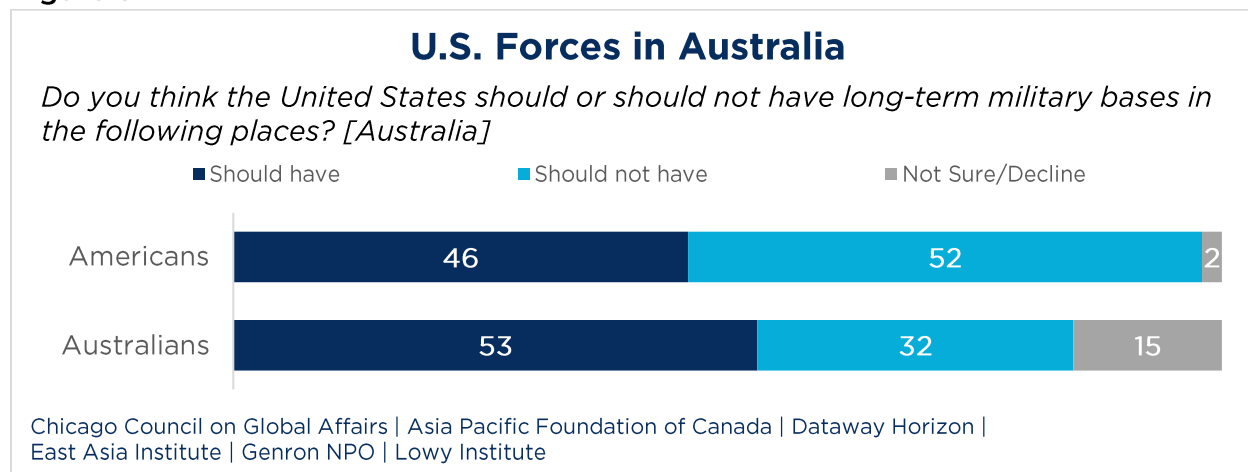
The South Korean public and the American public are closely aligned on their views of US bases in South Korea: seven in ten (70%) Americans believe the United States should maintain its bases there, and six in ten (62%) South Koreans agree.

Figure 5



When it comes to US bases in Australia there is less agreement. But somewhat unusually, it is not the host country that is less supportive of US forces. A majority of Australians (53%) are in favor of allowing the United States to base military forces in the country, with one-third (32%) opposed.<sup>2</sup> The American public, however, is less supportive. A majority (52%) say that the United States should not have bases there, although 46 percent do express support.

Figure 6



<sup>2</sup> In Australia, respondents were asked if they were in favor or against basing US military forces in Australia.

## Perceptions of Bilateral Relations in the Region

Bilateral relations in the Asia-Pacific are complex. While the United States maintains robust alliances in the region, China's rise and economic importance has required that its interests be accommodated across a range of issues. There are also intra-alliance rivalries, such as that between South Korea and Japan. These competing security, economic, and historic elements combine to create a dynamic that remains difficult to define, complicating policy approaches to the region. The public's perceptions of bilateral relations in the region provide an important view into the complex dynamics at play.

Thus far, one of the least understood aspects of public opinion in the region is how Chinese citizens view bilateral relationships throughout the region.

The Chinese public is generally warm toward neighbors and western countries involved in the region. On a thermometer scale, where 0 represents a very cold, unfavorable feeling and 100 represents a very warm, favorable feeling, solid majorities of Chinese express warm feelings of Russia (71°), the United States (67°), Australia (64°), and Canada (64°) and more than half are favorable toward South Korea (55°) and North Korea (55°). The Chinese public is relatively cooler toward Japan (47°).<sup>3</sup>

The Chinese public's views of bilateral relations generally follow their overall feelings towards the same nations. Along with rating Russia highest on a feeling thermometer, half of Chinese (50%) say that Sino-Russian relations are improving, by far the highest of all countries asked about. Similarly, and matching their warm feelings towards the countries overall, majorities of the Chinese public say that relations are staying about the same with the United States (61%), Canada (63%), and Australia (62%).

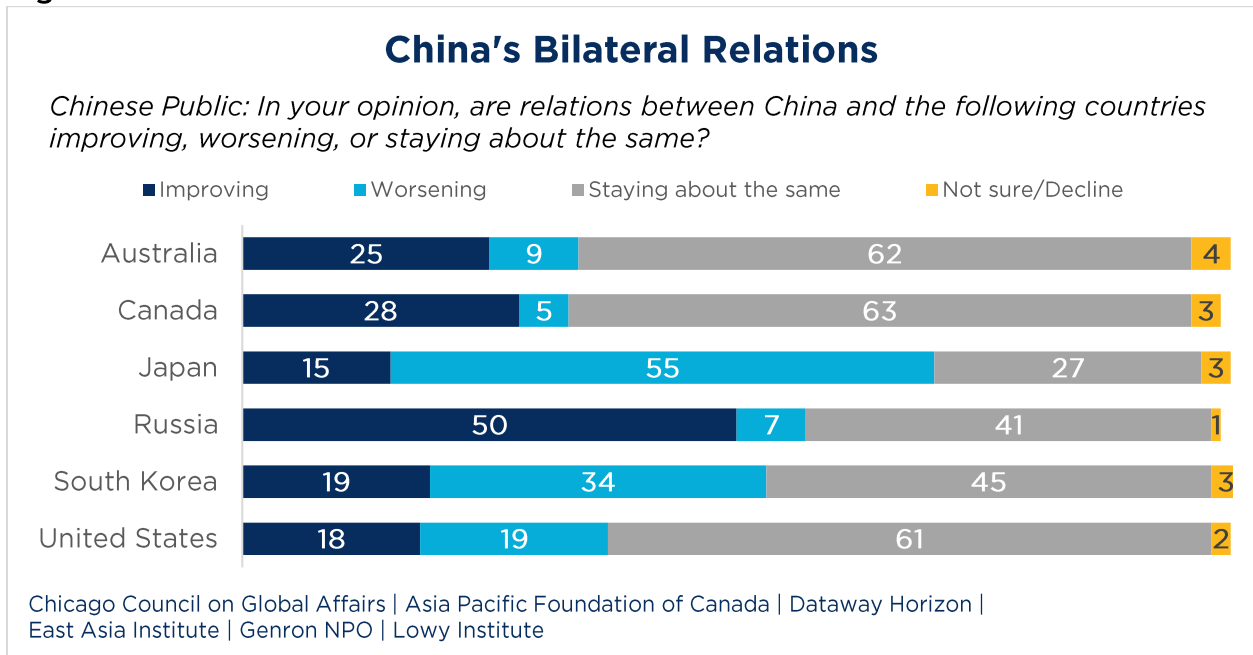
The Chinese public is slightly less enthusiastic about relations with South Korea. While a plurality (45%) say that relations are staying about the same, a third (34%) see them as worsening, And when it comes to Japan, lowest rated on the thermometer, a majority of Chinese (55%) say that relations between the two nations are worsening.

Around the region, views of bilateral relations with China are largely neutral with most countries saying that relations with China staying about the same. Only in South Korea did a plurality say relations were improving.

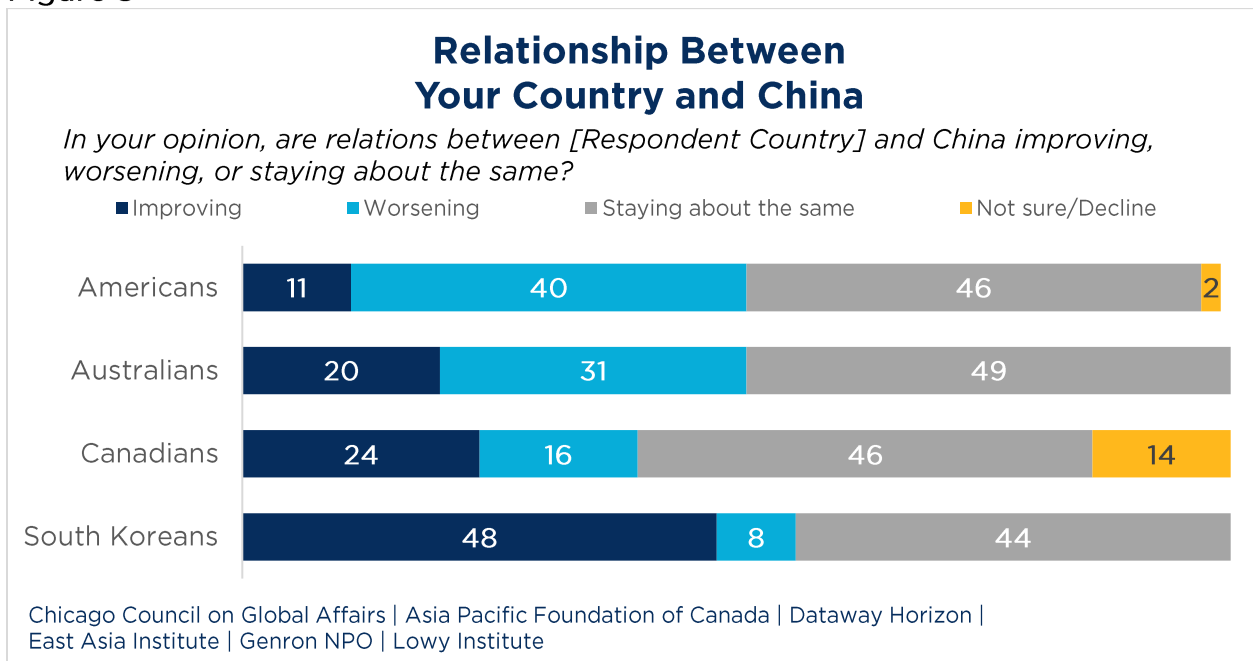
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<sup>3</sup> The full figure for thermometer readings can be found in Appendix Figure 1.

**Figure 7**



**Figure 8**



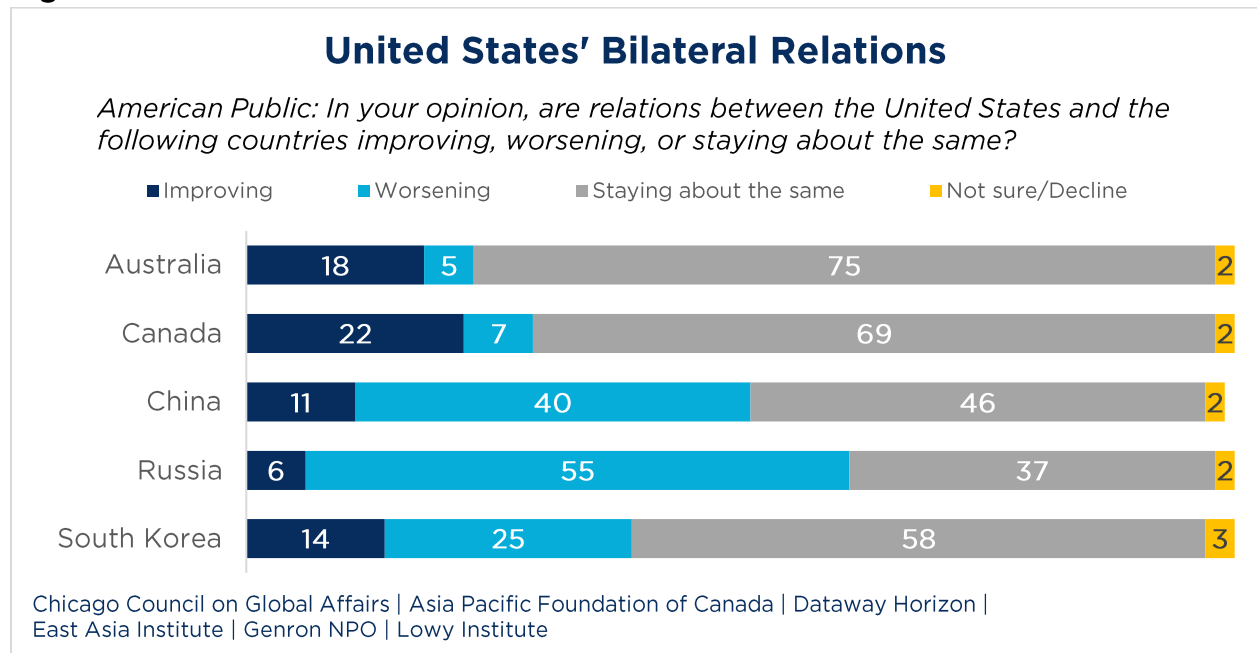


In the United States, the public expresses warm feelings toward Canada (81°), Australia (77°), Japan (63°), and South Korea (55°). Americans are cooler on China (44°) and Russia (40°), and feel downright cold towards North Korea (19°). Largely matching the Chinese public, Americans are likely to see relationships with countries around the region as being relatively stable. Of course, there are myriad reasons for this. In the case of allies like Australia and Canada, there is relatively little turbulence in the relationship meaning that improvements to these relationships are incremental and often out of sight of the general public.

Seven in ten (69%) Americans say that relations with Canada remain about the same, and 75 percent say the same about US-Australia ties. There is less certainty about the relationship with South Korea, but nearly three-quarters of Americans say that this bilateral relationship is either staying the same or improving.

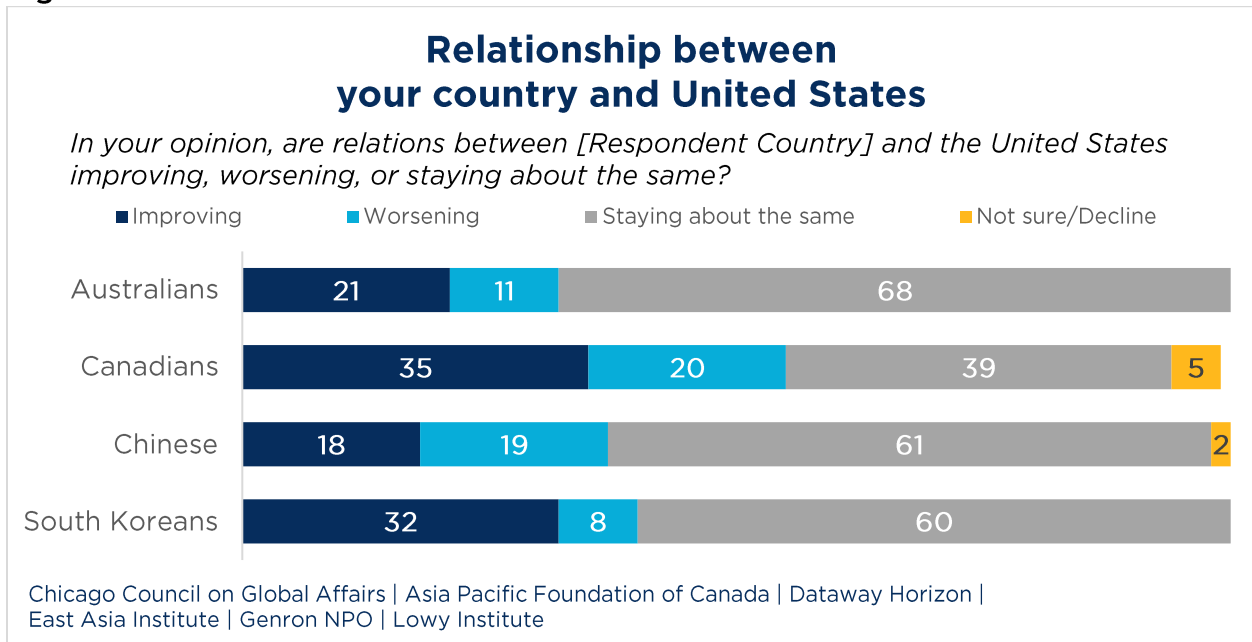
When it comes to China, however, there is a much more significant divide. While a plurality (46%) state that relations with China are staying about the same, four in ten (40%) say that these relations are worsening. Views of relations with Russia are even more pessimistic, with an outright majority (55%) saying that relations are worsening.

**Figure 9**



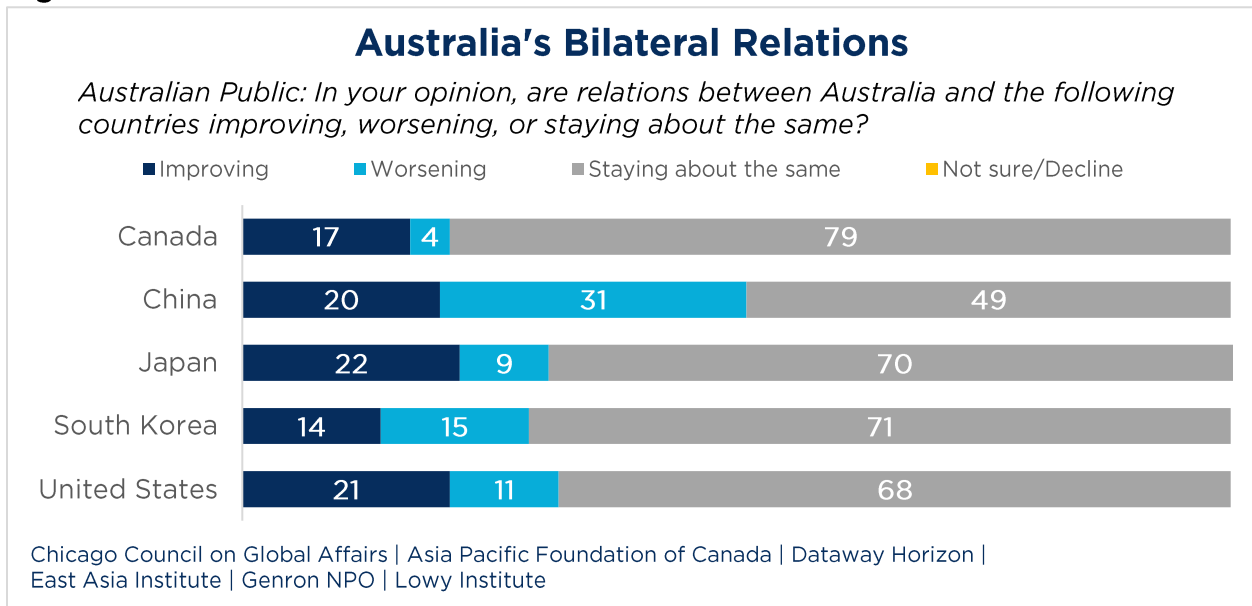
Matching Americans' views of stable bilateral relationships, relatively few respondents in any country polled say that their relations with the United States are worsening. Majorities of Australians (68%), Chinese (61%), and South Koreans (60%), and a plurality of Canadians (39%), say that relations with the US are staying about the same.

Figure 10



Australians have mostly warm feelings toward regional players including Canada (84°), Japan (70°), the United States (68°), South Korea (59°), China (58°), and Russia (52°), with North Korea (26°) a notable exception.<sup>4</sup> Australians also see their relations with these same countries in the region as stable. Large majorities say that relations with countries are staying about the same, with the sole exception of China. Three in ten (31%) Australians regard Australia-China bilateral relations as worsening, although 49 percent see the relationship as stable.

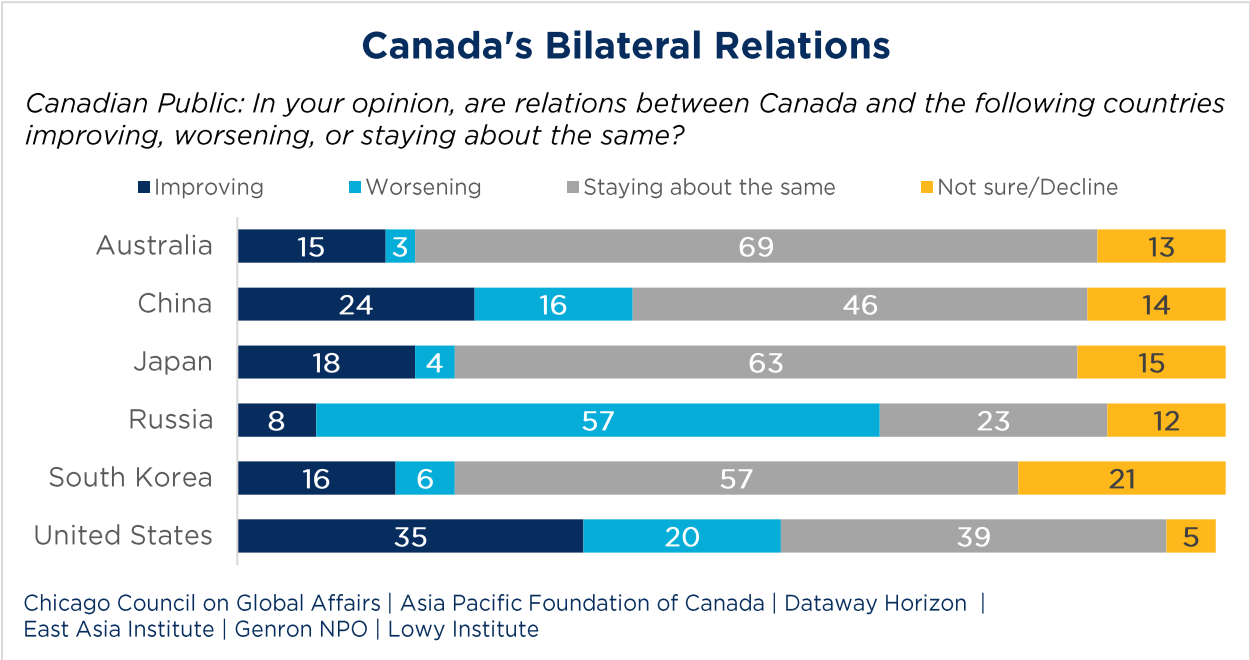
Figure 11



<sup>4</sup> Results from the annual Lowy Institute Poll 2016, with the exception of data on South Korea which is drawn from the Lowy Institute Poll 2014.

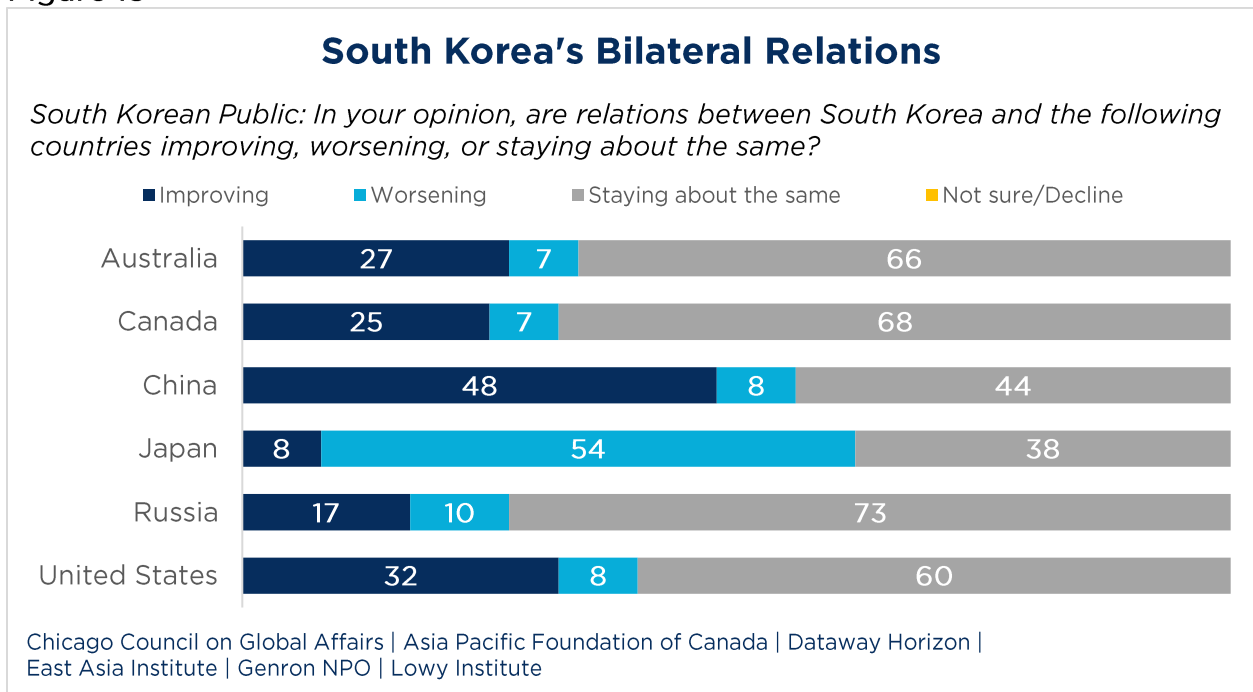
Canadians also believe that their relations throughout the region are stable, with majorities or pluralities seeing relations with Australia (69%), Japan (63%), South Korea (57%), and China (46%) as staying the same. Canadians are more closely divided on the United States, though the division is between the four in ten who see relations as stable (39%) and the third who say relations are improving (35%). The only exception to this general positivity are Canadian views on Russia: nearly six in ten (57%) think that Canada’s ties with Russia are worsening, and few see relations improving.

**Figure 12**



For South Koreans, only one bilateral relationship in the region is cause for concern: Japan. While official relations seemingly improved through much of 2016, a majority in South Korea (54%) say that relations with Japan are worsening. For all other countries, large majorities of South Koreans say that relations are either improving or staying about the same. Those views are largely reflected in South Korean ratings of other countries on a feeling thermometer, with warm ratings for the United States (73°) and China (60°), cooler views of Japan and Russia (43° each), and cold views of North Korea (28°).

Figure 13

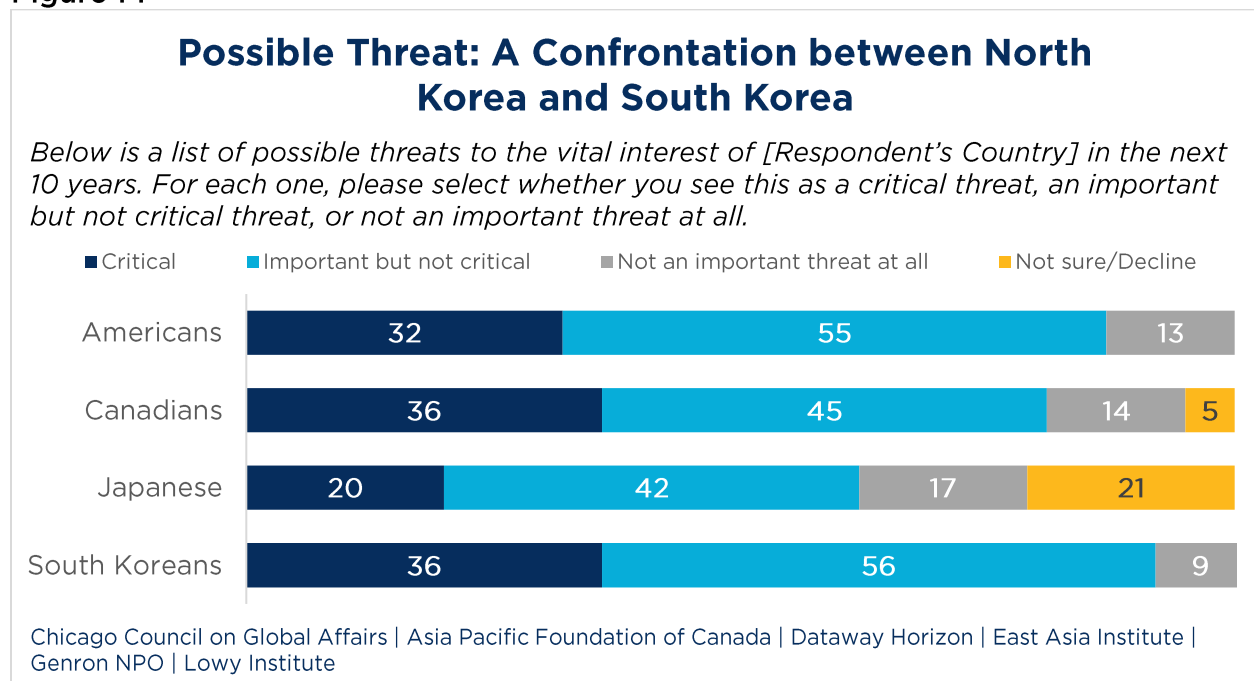


## Countries Agree on a Range of Threats

With rapidly evolving developments within Northeast Asia and across the broader Asia-Pacific, the countries of the region confront a demanding—and changing—security environment. With territorial disputes causing friction between many of the key regional actors, is there sufficient public consensus in the region to address the threats faced in common?

The Korean Peninsula remains a potential flashpoint as South and North Korea continue to exchange threats and warnings. Despite these ongoing tensions a potential clash between the countries is not viewed as a critical threat in any country in which the question was asked.<sup>5</sup> Even among South Koreans, just one-third (36%) say that a confrontation between North and South Korea is a critical threat. This puts it roughly in line with responses in both Canada (36%) and the United States (32%).

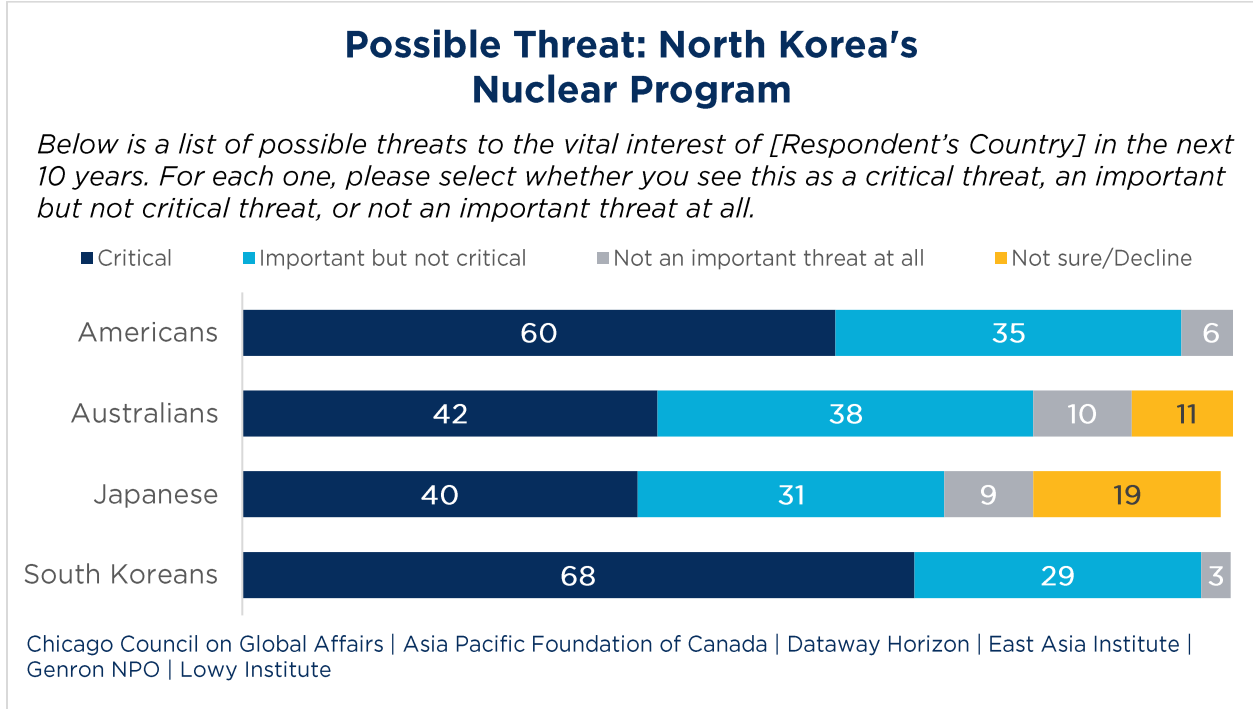
Figure 14



<sup>5</sup> For a breakdown of perceived threats by country, please see the Appendix.

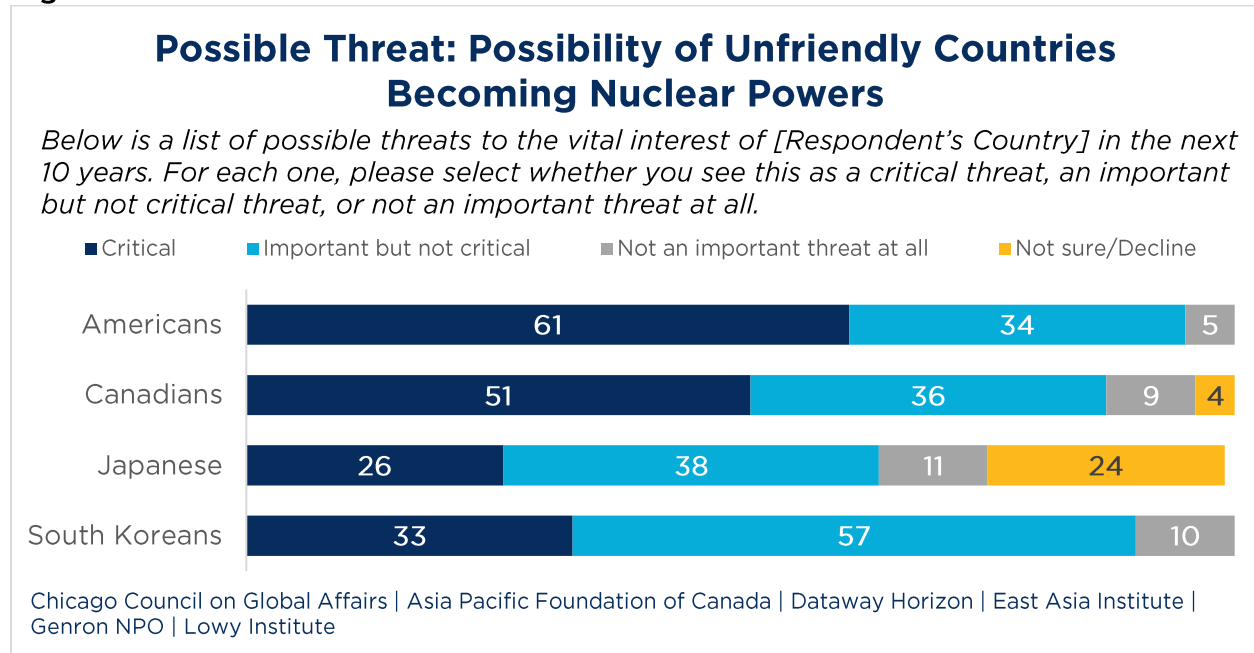
However, one aspect of the North Korean threat does raise great public concern: North Korea's nuclear program. South Koreans (68%) and Americans (60%) are the most concerned about the North's nuclear program, with majorities in both countries naming it a critical threat. Australians (42%) are less concerned, but still name it as one of the top five threats facing Australia.

**Figure 15**



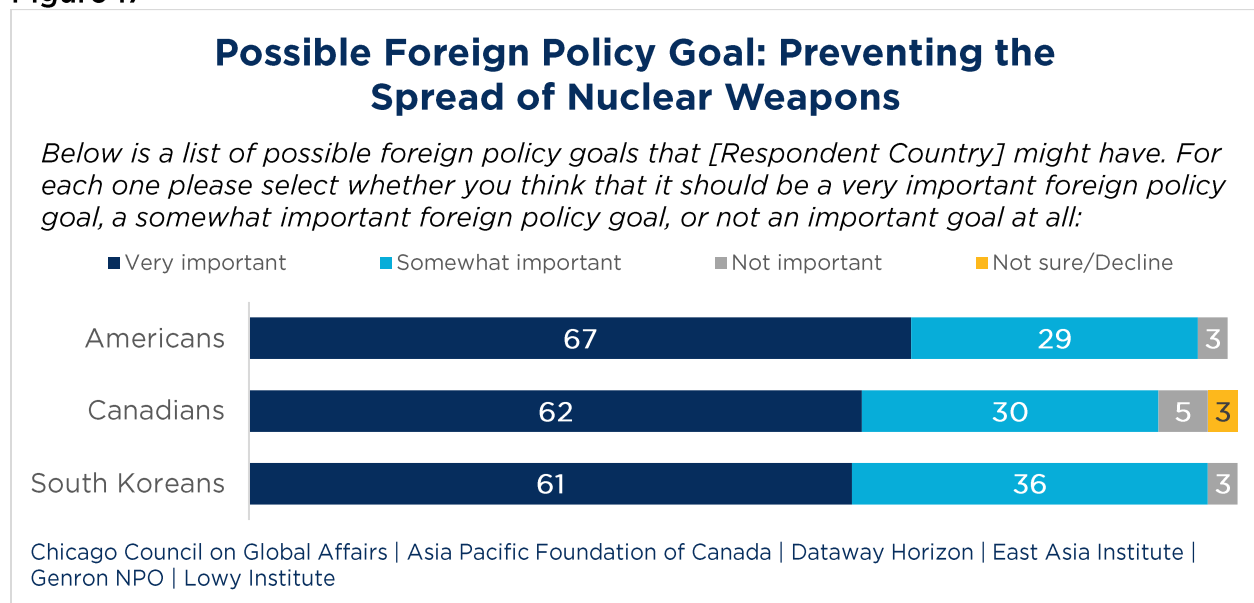
The broader issue of nuclear proliferation, and the possibility of unfriendly countries becoming nuclear powers, is also seen as a critical threat by majorities of Americans (61%) and Canadians (51%). A majority of South Koreans (57%), however, rate this possible threat as important but not critical. The lower level of concern registered in South Korea appears anomalous but may be because the number of countries unfriendly to South Korea is really just one—North Korea.

**Figure 16**



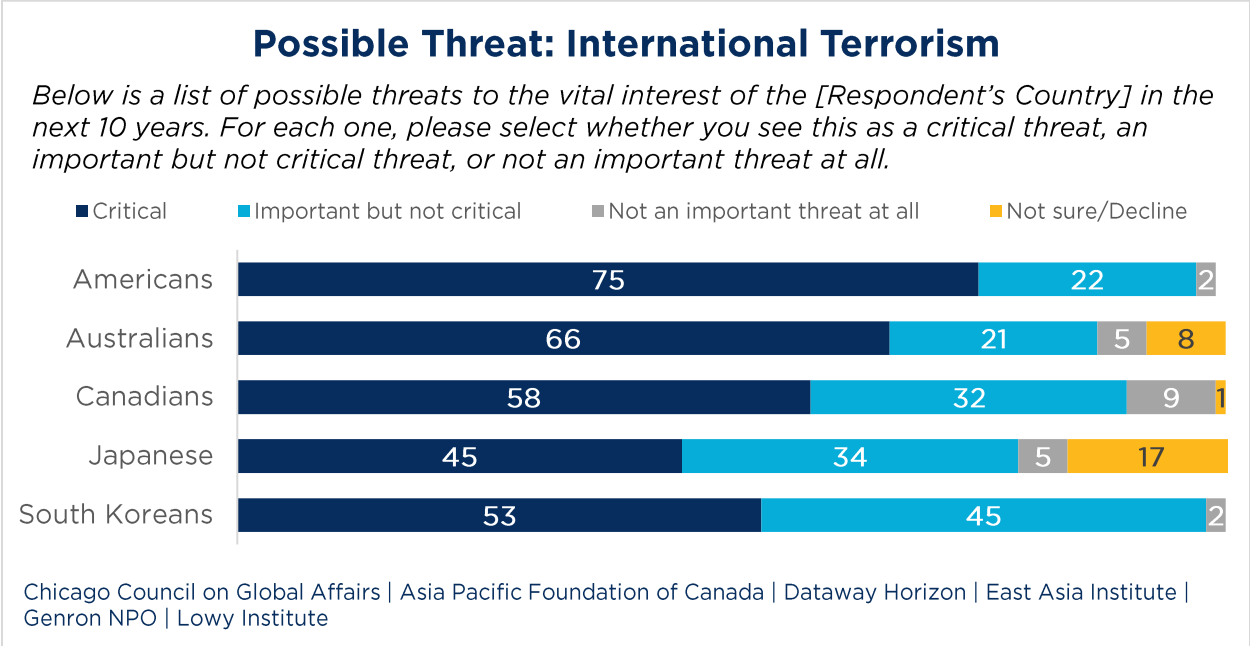
With these threats facing the region, it is no surprise that majorities in every country in which the question was asked view preventing the spread of nuclear weapons as a very important foreign policy goal. In each country, at least six in ten agree, and roughly three in ten in each country say it is a somewhat important goal.

**Figure 17**



However, the greatest threat perceived by regional publics is not specific to the Asia-Pacific. When it comes to potential threats, there is broad agreement across countries that international terrorism is a critical threat—and commonly the most critical threat—facing each country. That perceived threat is highest in the United States (75%). Majorities in Australia (66%) Canada (58%), and South Korea (53%) agree, and though only a plurality in Japan name it a critical threat (45%), it is the most highly rated threat among Japanese. Moreover, the percentage of respondents that say that international terrorism is not an important threat at all is below ten percent in each country.

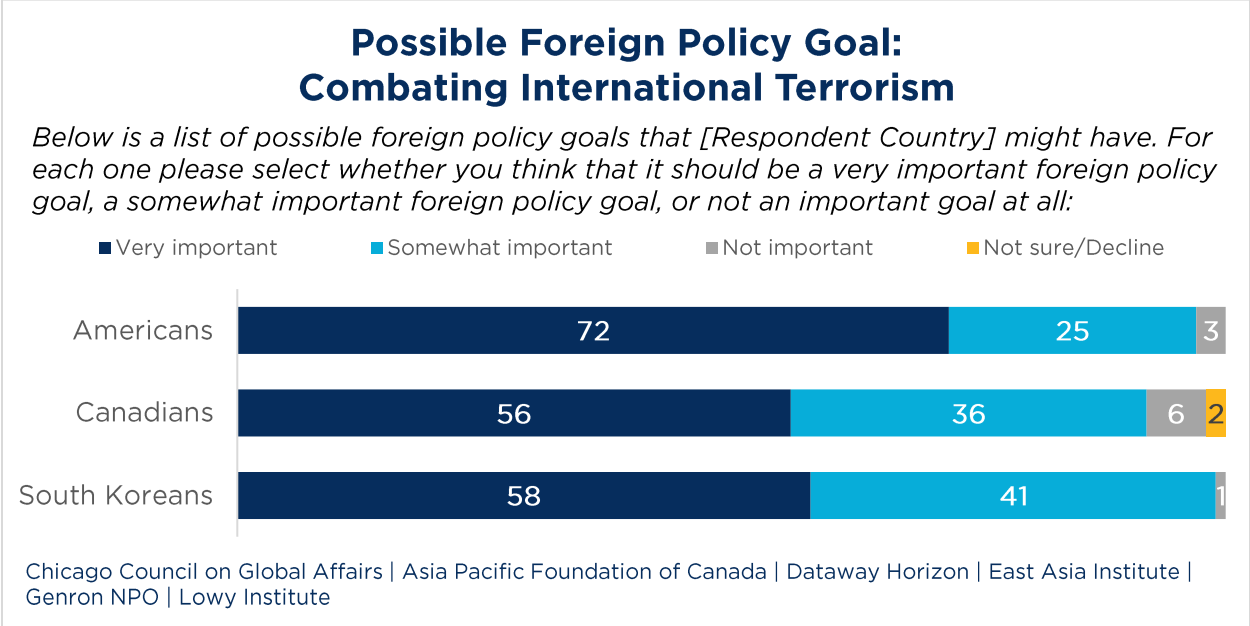
**Figure 18**





With the perceived threat of international terrorism being so widely shared, it is thus understandable that combatting international terrorism is an important foreign policy goal in each surveyed country. Majorities in the United States (72%), South Korea (58%), and Canada (56%) all cite this as a very important foreign policy goal.

**Figure 19**

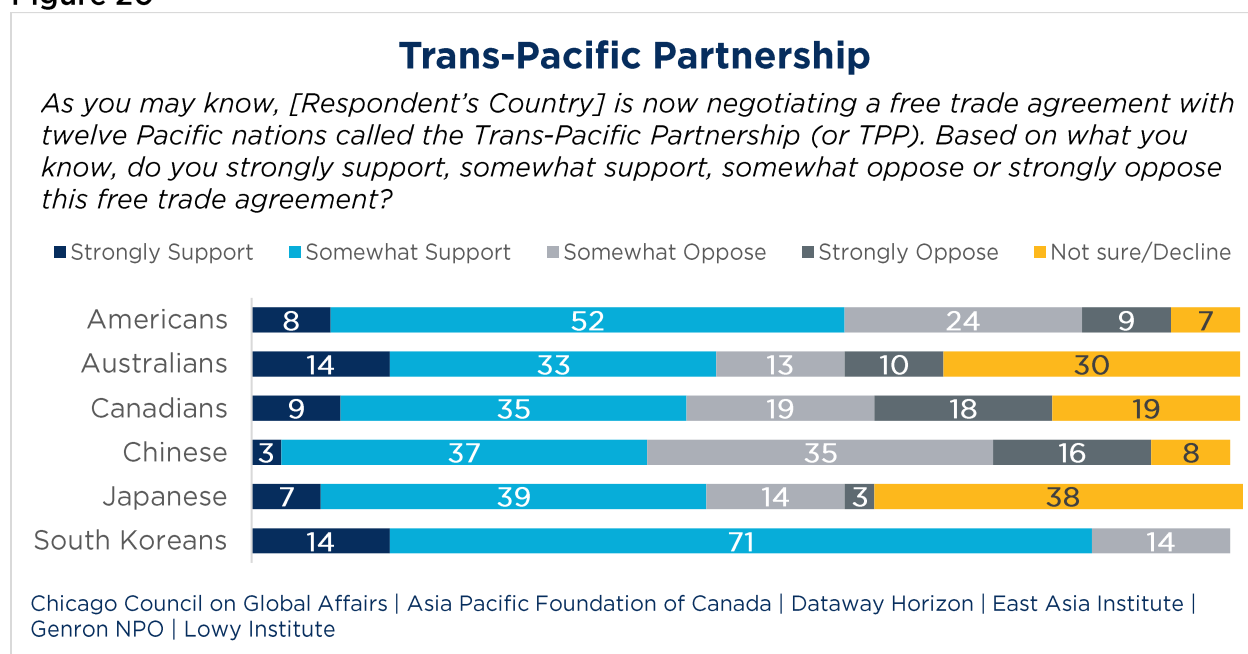


## Common Economic Challenges

In the Asia-Pacific, security issues often dominate the policy debate. However, countries on both sides of the Pacific face other common challenges such as immigration, protecting the jobs of domestic workers, the specter of financial crises, and serious concerns over climate change.

The economic issue most in the headlines over the past several years has been the regional free trade agreement under negotiation, the Trans-Pacific Partnership (TPP). For two flagship members—Canada and Australia—support for the TPP is tepid. In Canada, 44 percent support the TPP. In Australia, that number is 47 percent. For the United States—also a founding member—support is much stronger (60%). Among non-member countries, far more South Koreans (85%) support the TPP than Chinese (40%).

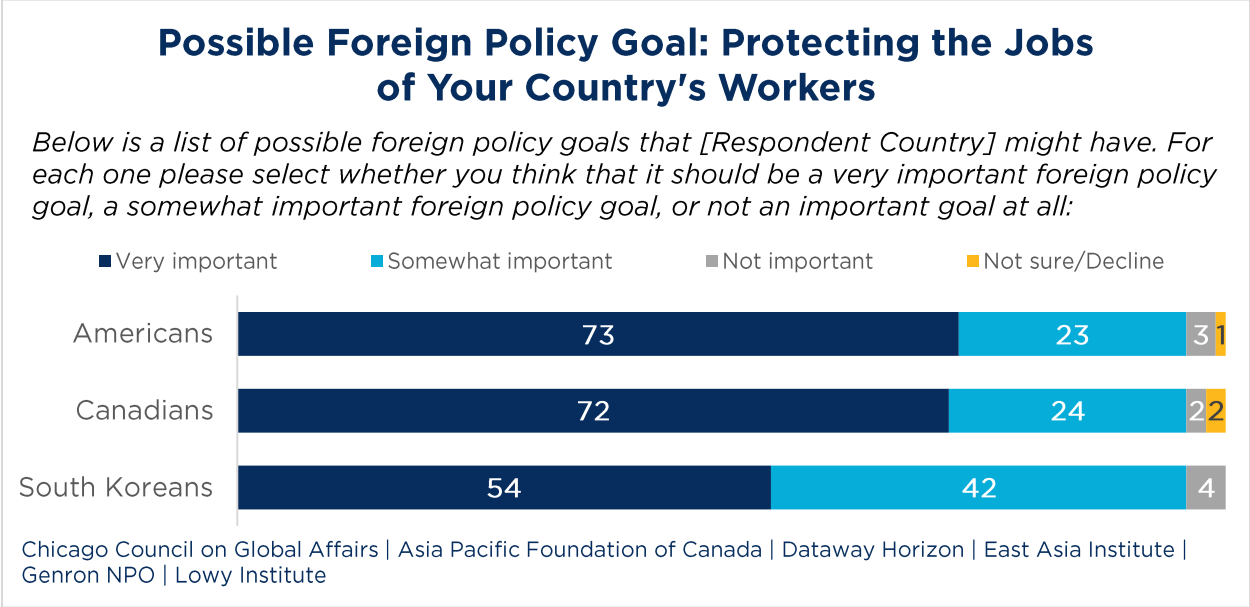
Figure 20<sup>6</sup>



<sup>6</sup> In Australia, the question wording was as follows: Australia has negotiated a free trade agreement with twelve Pacific nations called the Trans-Pacific Partnership (or TPP). Based on what you know, do you strongly support, somewhat support, somewhat oppose, or strongly oppose this free trade agreement?

While publics in many countries support such a trade agreement, a top priority for many is protecting jobs in their own countries. In the United States (73%) and Canada (72%), more than seven in ten say that protecting the jobs of workers is a very important foreign policy goal. It is also a concern in South Korea, where 54 percent say the same.

Figure 21

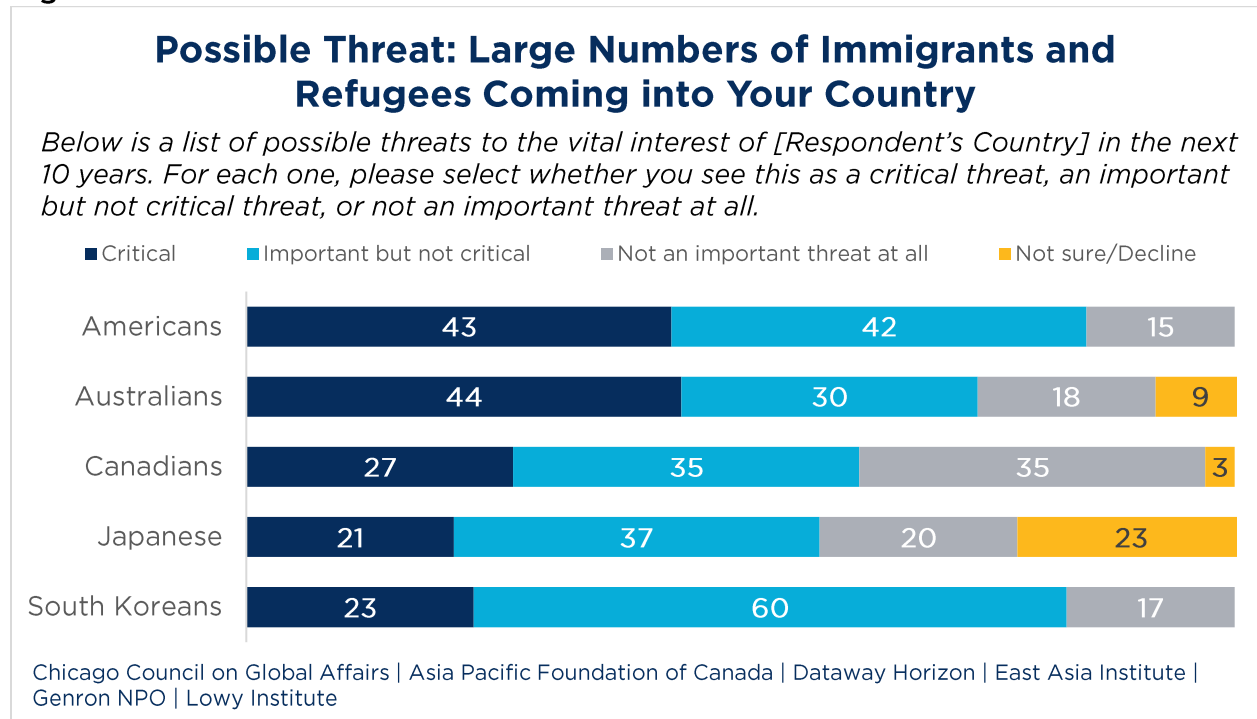


The rhetoric of ‘protecting jobs’ frequently comes up in the context of immigration policy, and how many immigrants of varying educational and skill levels to admit into the receiving country.

For Canada, Australia, and the United States immigration has long been an important factor in their history and in the composition and growth of their populations. However, there are significant differences in attitudes between these countries when it comes to immigration. Canadians are unlikely to cite immigration as a critical threat facing the country, with just 27 percent stating as such. In comparison, both Australians and Americans are much more wary. Pluralities in both countries say that immigration represents a critical threat to their respective countries.

South Korea is much newer to the experience of immigration, and levels of immigration are low, albeit increasing. In 2016, just two in ten (23%) Koreans say that immigration represents a critical threat, but this may change as levels of immigration increase. Similarly, Japanese are unlikely to name immigration as a threat to Japan: though the foreign resident population in Japan has risen over the last twenty years, it remains small compared to the total population.

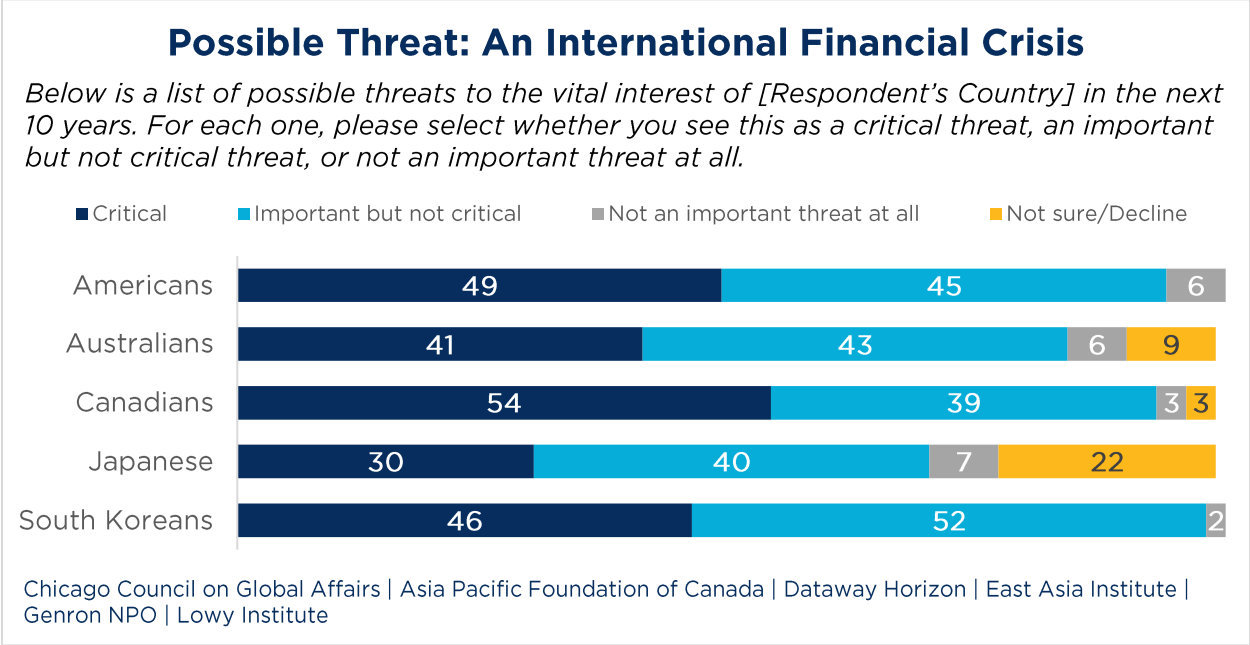
Figure 22



One reason publics may cite immigration as a potential threat is the perception that migrants may deprive native citizens of employment opportunities, and publics' prioritization of their own job security suggests that this is a live issue across the region.

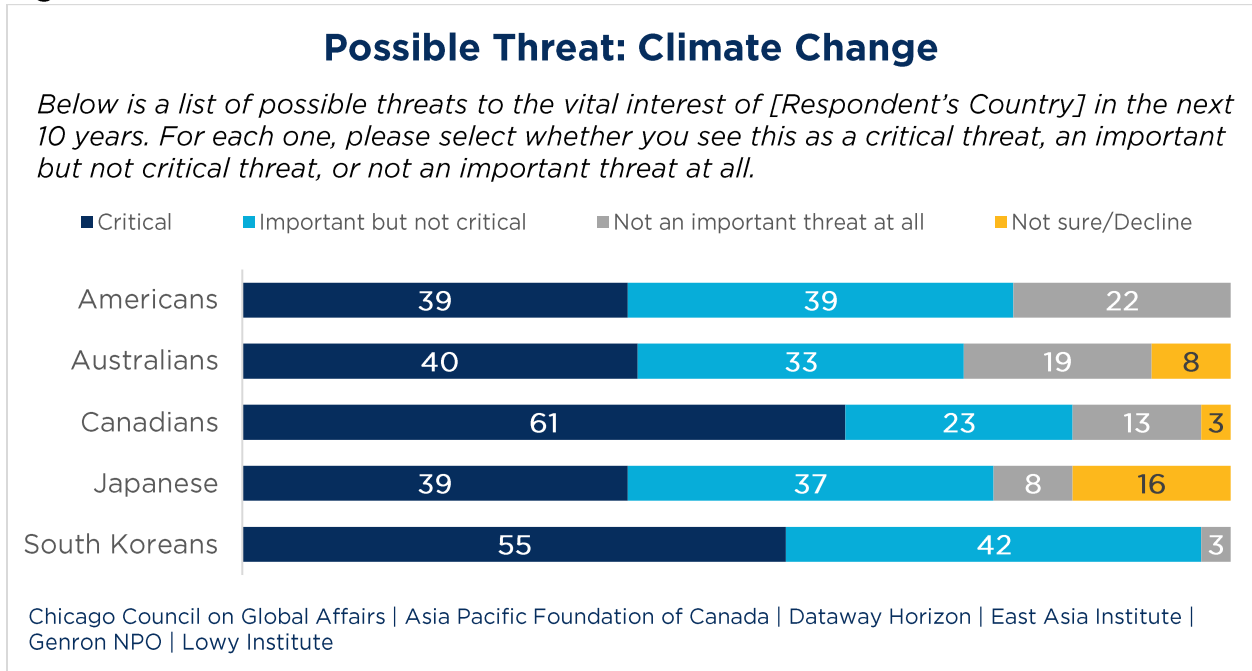
Of course, immigration is not the only possible perceived threat to domestic workers. Economic recession is a far broader threat to workers' job security. Eight years after the financial crisis of 2008, the possibility of another international financial crisis looms large in the region. More than three in ten in each of the survey countries see an international financial crisis as a critical threat to their vital interests, and an outright majority in Canada (54%) say the same.

**Figure 23**



Finally, perceptions of the threat posed by climate change vary across the surveyed countries. For the publics of each country, climate change is perceived by most as either an important or critical threat. However, while majorities of Canadians and South Koreans see climate change as a critical threat, perceptions of the threat among Australians and Americans is far lower, with no more than four in ten Australians and Americans agreeing it is a critical threat to their vital interests.

**Figure 24**



## Conclusion

Asia continues to be a region of complex bilateral relationships, bookended by the United States and China.

The publics around the region see stability as the order of the day. While some bilateral relationships are viewed negatively in the region, this does not necessarily reflect the generally positive overall views individual publics hold of those countries. One notable exception is South Korea's relationship with Japan. This relationship is a continual point of concern.

Though China's rise is certainly a topic of discussion in every capital in the Asia-Pacific, it has not been met with alarm by the various publics: in no country do a majority say that China's military power represents a critical threat. That may be due in part to generally positive regional views of American military and economic power, though Americans themselves, along with Australians, are less bullish on both fronts.

Despite the range of different issues confronting nations around the region, the data in this report suggest that there are broad swaths of overlap in terms of mutual concern. Americans, Australians, South Koreans, Canadians, and Japanese all name international terrorism as a top-three critical threat facing their country. Other shared areas of concern include North Korea's nuclear program, the possibility of another financial crisis, and for Koreans, Canadians, and Japanese, climate change.

In short, the data should give hope to those seeking further cooperation and engagement between the nations of the Asia-Pacific. While there are certainly some causes for concern in perceptions of poor relationships between some of the major regional actors, publics across the region hold many views in common, providing a base of public support for future regional cooperation.

## Methodology

### United States - the Chicago Council on Global Affairs

The analysis in this report is based on data from the 2016 Chicago Council Survey of the American public and US foreign policy. The 2016 Chicago Council Survey was conducted by GfK Custom Research using their large-scale, nationwide online research panel between June 10-27, 2016, among a national sample of 2,061 adults, 18 years of age or older, living in all 50 US states and the District of Columbia. The margin of sampling error for the full sample is  $\pm 2.38$ , including a design effect of 1.2149. The margin of error is higher for questions administered to a partial sample.

The 2016 Chicago Council Survey is made possible by the generous support of the John D. and Catherine T. MacArthur Foundation, the Korea Foundation, and the personal support of Lester Crown and the Crown family.

### Canada - Asia Pacific Foundation of Canada

The Asia Pacific Foundation of Canada commissioned EKOS Research Associates to conduct a survey of 3,526 Canadian adults who are participants in the Probit online survey panel. The survey was conducted from June 28 to July 21, 2016. The margin of error is  $\pm 1.6\%$  for the entire sample. For questions about threats and policy goals, the sample was divided and the margin of error is  $\pm 2.3\%$ . The results have been statistically weighted by EKOS according to current Statistics Canada census data on age, gender, and region to ensure that the sample is representative of the entire adult population. Discrepancies in or between totals are due to rounding.

### China - Dataway Horizon

The analysis of Chinese public opinion in this report is based on data from a study conducted by Dataway Horizon as part of a multinational collaborative effort. The survey was conducted September 5-13, 2016 among a sample of 1,520 adults, 18 years or older, living in fifteen major metropolitan areas (Beijing, Tianjin, Jinan, Qingdao, Guangzhou, Shenyang, Shanghai, Nanjing, Hangzhou, Wuhan, Zhengzhou, Changsha, Chongqing, Chengdu, and Xi'an). The margin of sampling error for the full sample is  $\pm 2.5$ . Respondents must have resided in the local area for more than one year and not participated in any other market survey during the previous six months. Interviewees were selected through a multistep process, first using a grid map to select households, then using a standard KISH grid to select the household respondent. The survey was then administered as a face-to-face interview in the respondent's household.

### South Korea - East Asia Institute

The data from South Korea was part of a poll commissioned by the East Asia Institute and conducted by Korea Research Co. The survey was conducted via face-to-face interviews and it surveyed 1,000 adults aged 19 and over. It employed quota sampling based on region, gender, and age. The survey was conducted from June 16, 2016 to July 5, 2016. The margin of error is  $\pm 3.1$  percent at the 95% confidence level.



## Japan - Genron NPO

The Genron NPO survey in Japan was conducted from June 18 to July 3, 2016 and from August 20 to September 4 among a national sample of 1,000 adults, 18 years of age or older. The survey was fielded in 50 regions of Japan, with 20 samples from each region collected based on a quota sampling method at the individual level using 2014 basic registration data. The survey was conducted face-to-face, with the questionnaire left with the respondent and then collected a few days later.

## Australia - Lowy Institute

The Australian data in this report is based on the results of a nationwide online poll of 1,222 Australians aged 18 years and older, between 14 and 19 July 2016. The 'feeling thermometer' data represented in Appendix Figure 1 and related text is drawn from the results of the annual Lowy Institute Poll 2016, a survey of 1,202 Australian adults between February 26 and March 15, 2016. See [www.lowyinstitute.org/publications/polling](http://www.lowyinstitute.org/publications/polling) for details. Fieldwork for the July survey was managed by Omnipoll research on behalf of the Lowy Institute and conducted by Lightspeed Research using their large-scale national online research panel. Results were post-weighted to Australian Bureau of Statistics data on age, highest level of schooling completed, gender and area. The maximum error margin for the total sample, after accounting for the effect of weighting, is 3.2%, with higher margins where the result for a sub-sample is reported.

## About

### About the Chicago Council on Global Affairs

The Chicago Council on Global Affairs is an independent, nonpartisan organization that provides insight – and influences the public discourse – on critical global issues. We convene leading global voices and conduct independent research to bring clarity and offer solutions to challenges and opportunities across the globe. Ranked [No. 1 Think Tank to Watch](#) worldwide, the Council on Global Affairs is committed to engaging the public and raising global awareness of issues that transcend borders and transform how people, business and governments engage the world. Learn more at [thechicagocouncil.org](http://thechicagocouncil.org) and follow [@ChicagoCouncil](#).

### About Dataway Horizon

Dataway Horizon is an international organization based in China providing data intelligence service. It has carried out multiple practices in providing various services to the governments, large enterprises, start-ups, and non-governmental organizations both domestically and internationally. Also, Dataway Horizon fastens attention on innovative services and products under the Internet economy, and exhausts capabilities in data mining and analyzing merged data streams to support the clients' strategies with respect to economic, social, cultural development and policy-making.

### About the Asia Pacific Foundation of Canada:

The Asia Pacific Foundation of 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.

The Foundation is well known for its annual national opinion polls of Canadian attitudes regarding relations with Asia, including Asian foreign investment in Canada and Canada's trade with Asia. The Foundation places an emphasis on China, India, Japan and South Korea while also developing expertise in emerging markets in the region, particularly economies within ASEAN.

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

## **About the East Asia Institute**

The East Asia Institute was established as an independent think-tank dedicated to developing ideas and formulating policy recommendations on the main challenges facing the region. Through hosting scholarly seminars, forums, education programs and various publications it can achieve these aims in creating influential products. EAI conducts research activities along with two main programs, the Foreign Affairs and Security Program and the Governance Research Program, which are conducted by five research centers. Through the utilization of the research task force team, EAI addresses imminent and critical issues. By working together with recognized scholars and leading policymakers, EAI is at the center of producing research outcomes reflecting innovation and influential policy debate. As one of the leading think-tanks in Korea, EAI is fulfilling the way in forming a true knowledge-net community in Northeast Asia by setting up a system of joint research and scholarly exchanges in the U.S., China, and Taiwan as well as many other countries.

## **About The Genron-NPO**

The Genron NPO was established in 2001 by leading Japanese intellectuals who were dissatisfied with the Japanese media, and called into question the authenticity of the voices of the general public. These intellectuals sought to prepare a new platform for constructive discussions and eventually nurture meaningful measures to address Japan's major issues. Our activities are independent and neutral with regard to any government interest or specific concern.

The mission of The Genron NPO is to create a strong democracy and a strong civil society in Japan on the strength of debates and sound public opinion. What we are aiming at is the creation of a sound democratic society in which voters are principal players and a strong civil society in which voters participate with a strong sense of being a stakeholder.

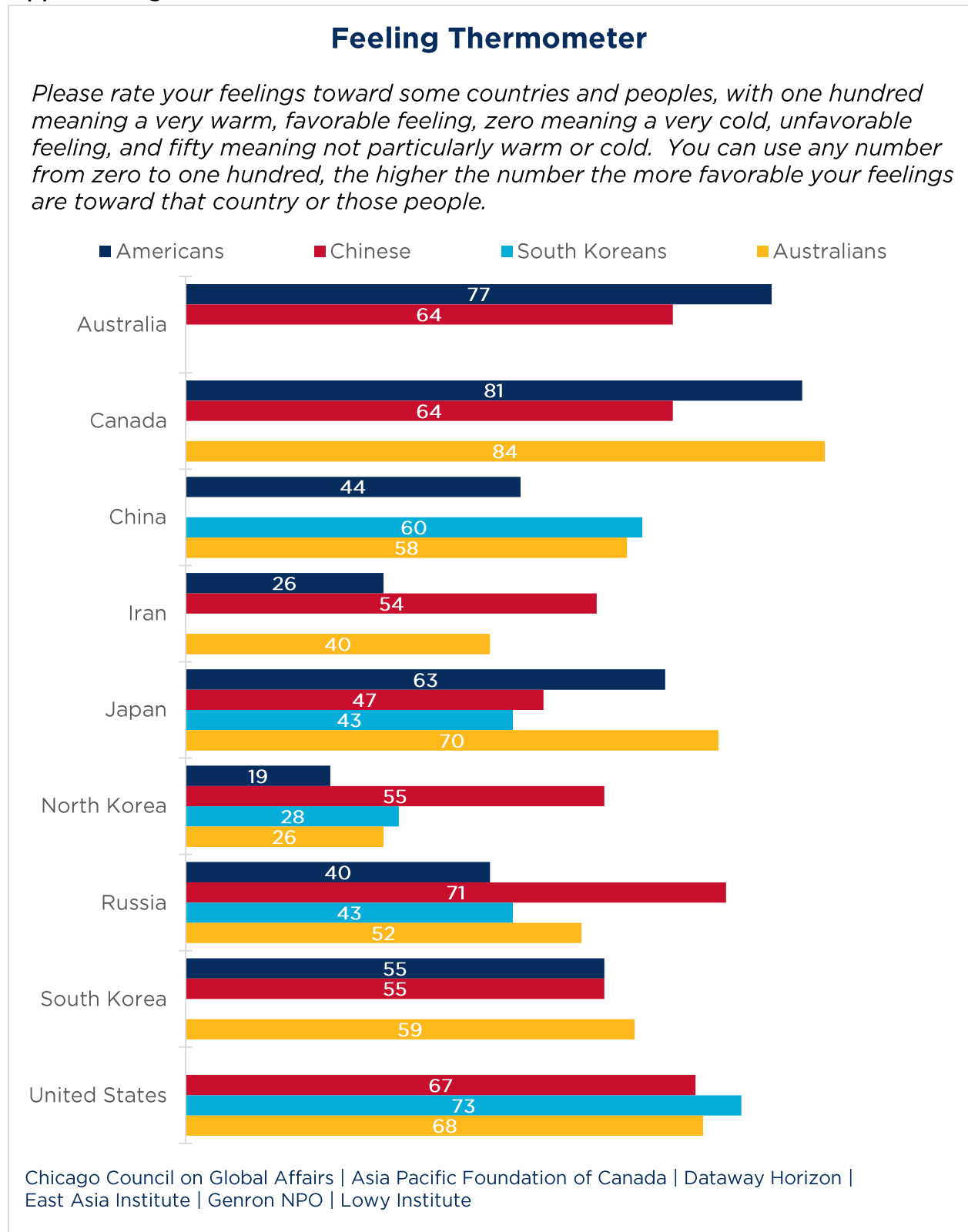
## **About Lowy Institute**

The Lowy Institute is an independent, non-partisan think tank based in Sydney, Australia. It is Australia's leading foreign policy think tank, providing high-quality research and distinctive perspectives on the international trends shaping Australia and the world. The Lowy Institute conducts a high-level program of research and events which aims to deepen the international policy debate in Australia and to give Australia a distinctive voice on the international stage.

The Lowy Institute has conducted robust, independent polling of the Australian public annually since 2005, allowing opinion to be compared over time. The annual Lowy Institute Poll is one of the Institute's flagship publications and provides insights into the constraints and opportunities public opinion creates for policy-makers in Australia. The Institute has also conducted numerous polls overseas in a range of countries in the Indo-Pacific region such as China, Indonesia, India, Fiji and New Zealand. For further information, see [www.lowyinstitute.org](http://www.lowyinstitute.org) and @LowyInstitute.

## Appendix

Appendix Figure 1

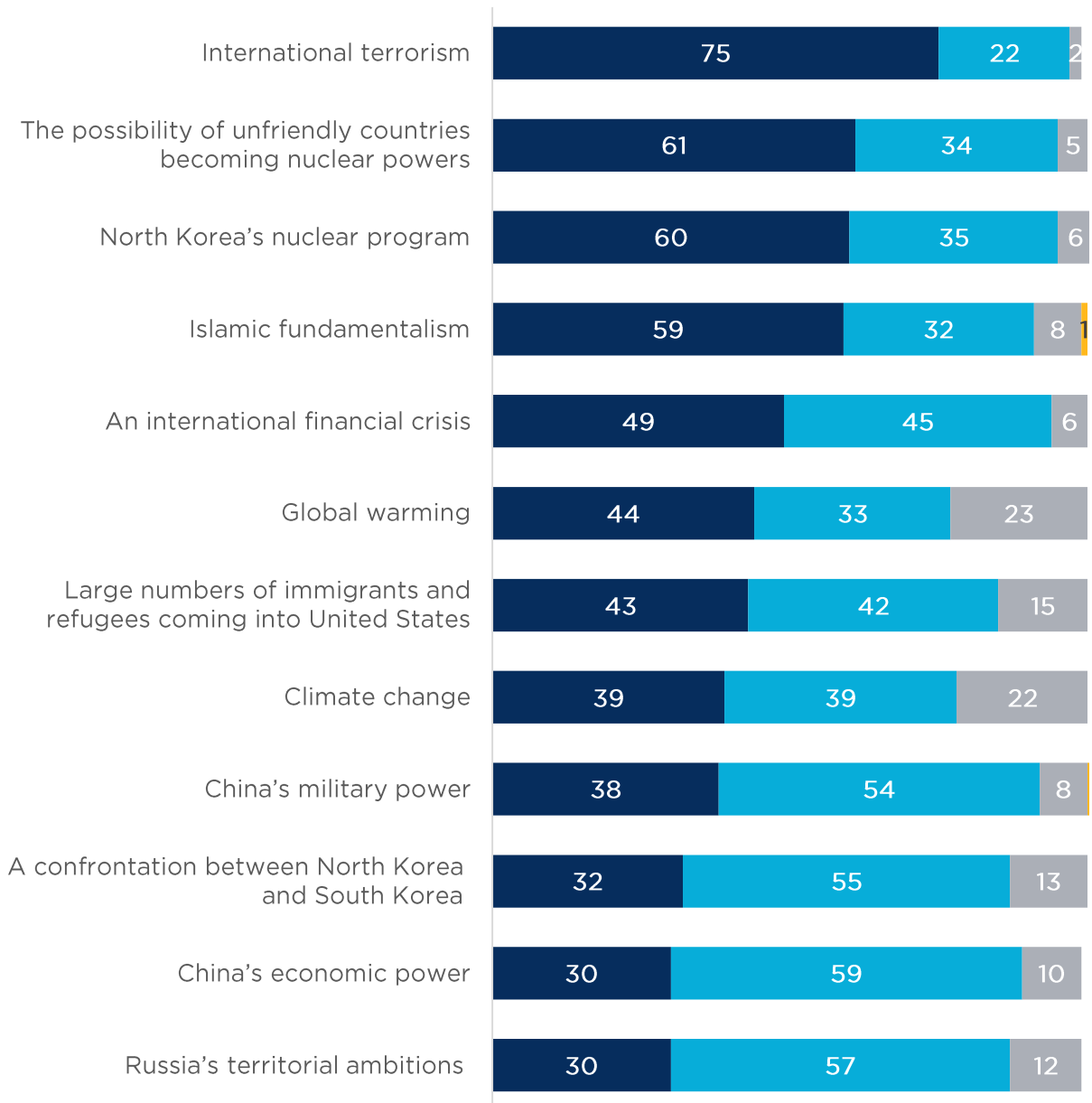


Appendix Figure 2

### Possible Threats: Americans

*Below is a list of possible threats to the vital interest of the United States in the next 10 years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.*

■ Critical ■ Important but not critical ■ Not an important threat at all ■ Not Sure/Decline



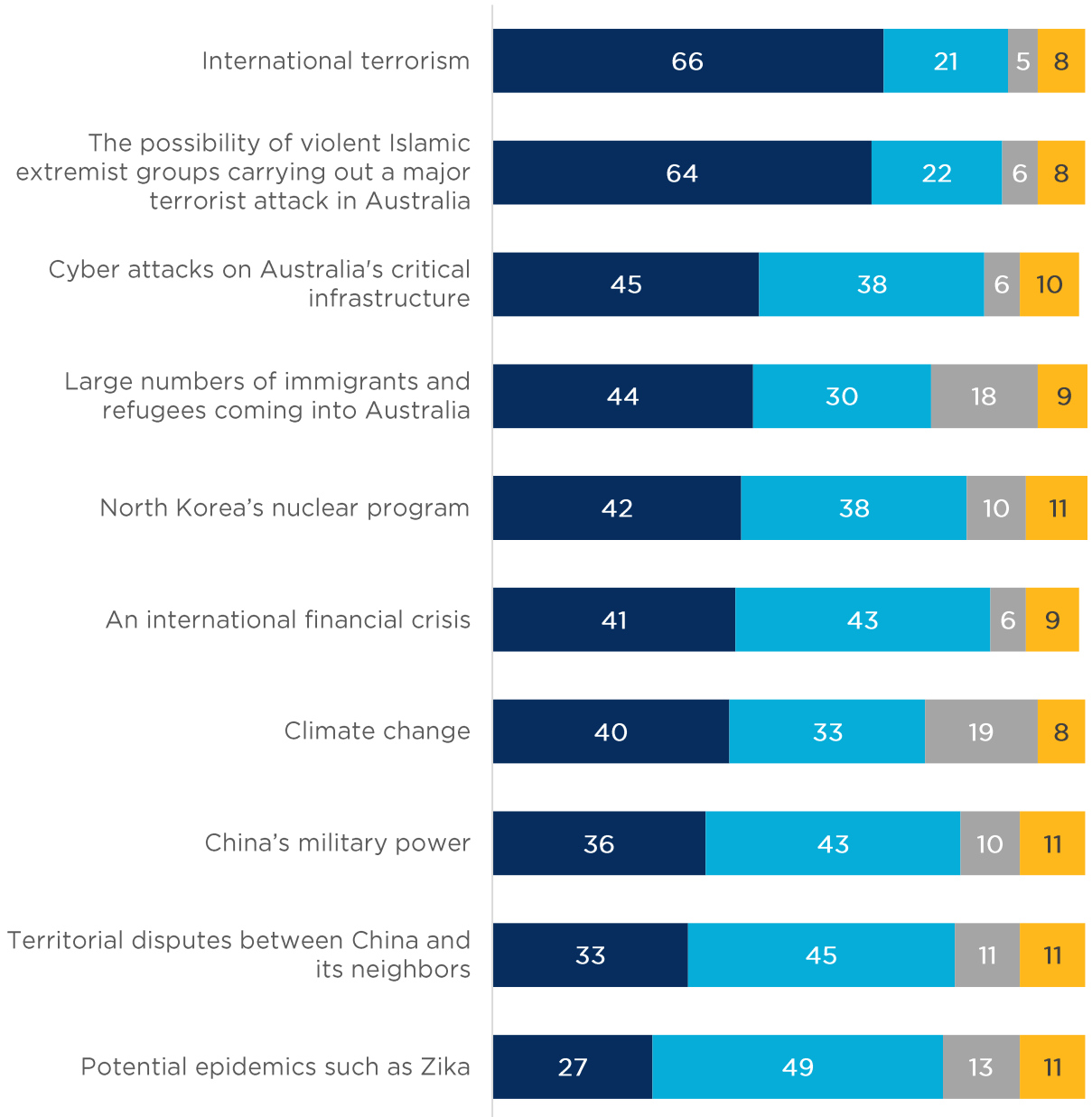
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**Appendix Figure 3**

### Possible Threats: Australians

*Below is a list of possible threats to the vital interest of Australia in the next 10 years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.*

■ Critical ■ Important but not critical ■ Not an important threat at all ■ Not Sure/Decline



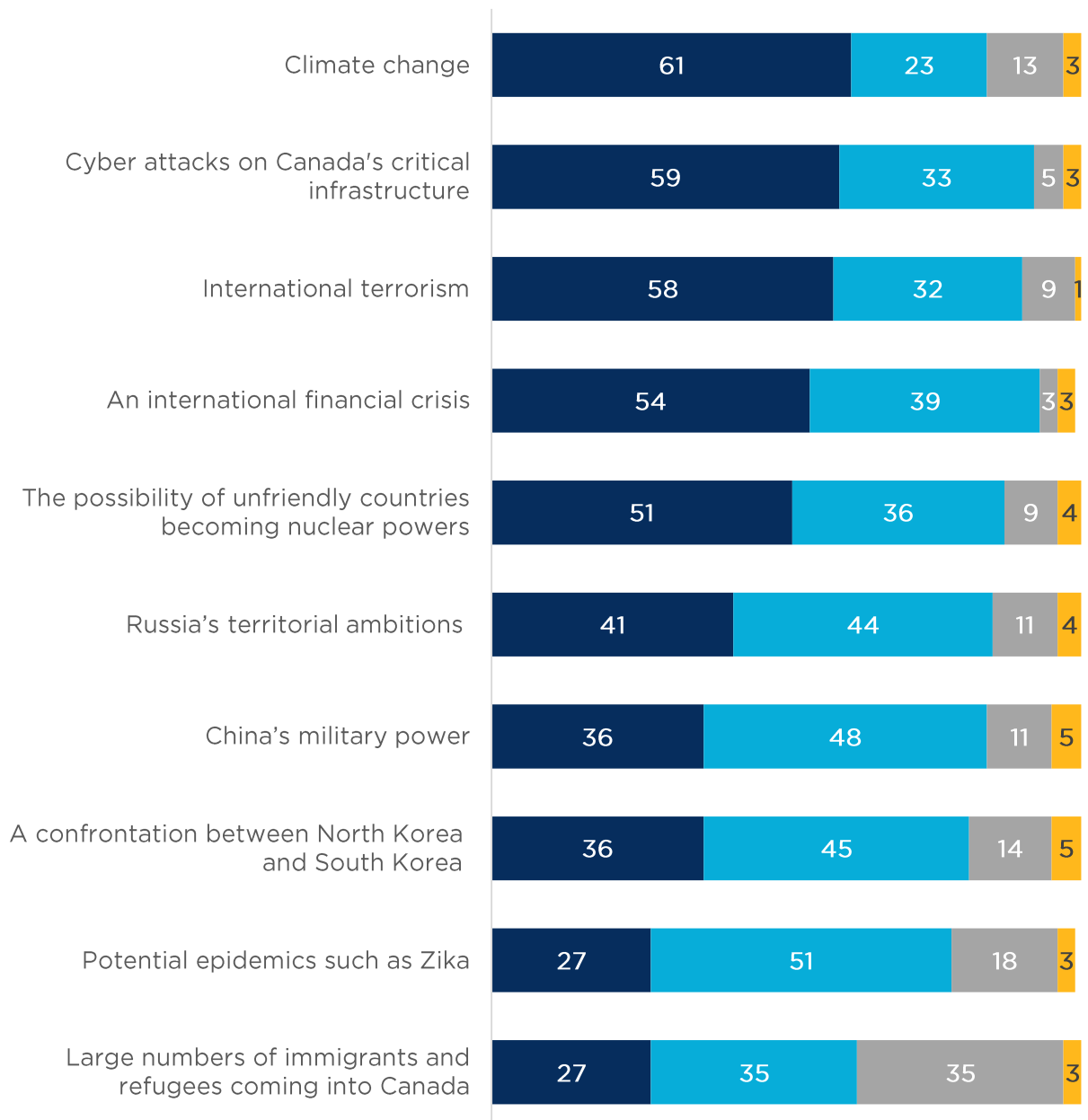
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Appendix Figure 4

## Possible Threats: Canadians

*Below is a list of possible threats to the vital interest of Canada in the next 10 years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.*

■ Critical ■ Important but not critical ■ Not an important threat at all ■ Not Sure/Decline



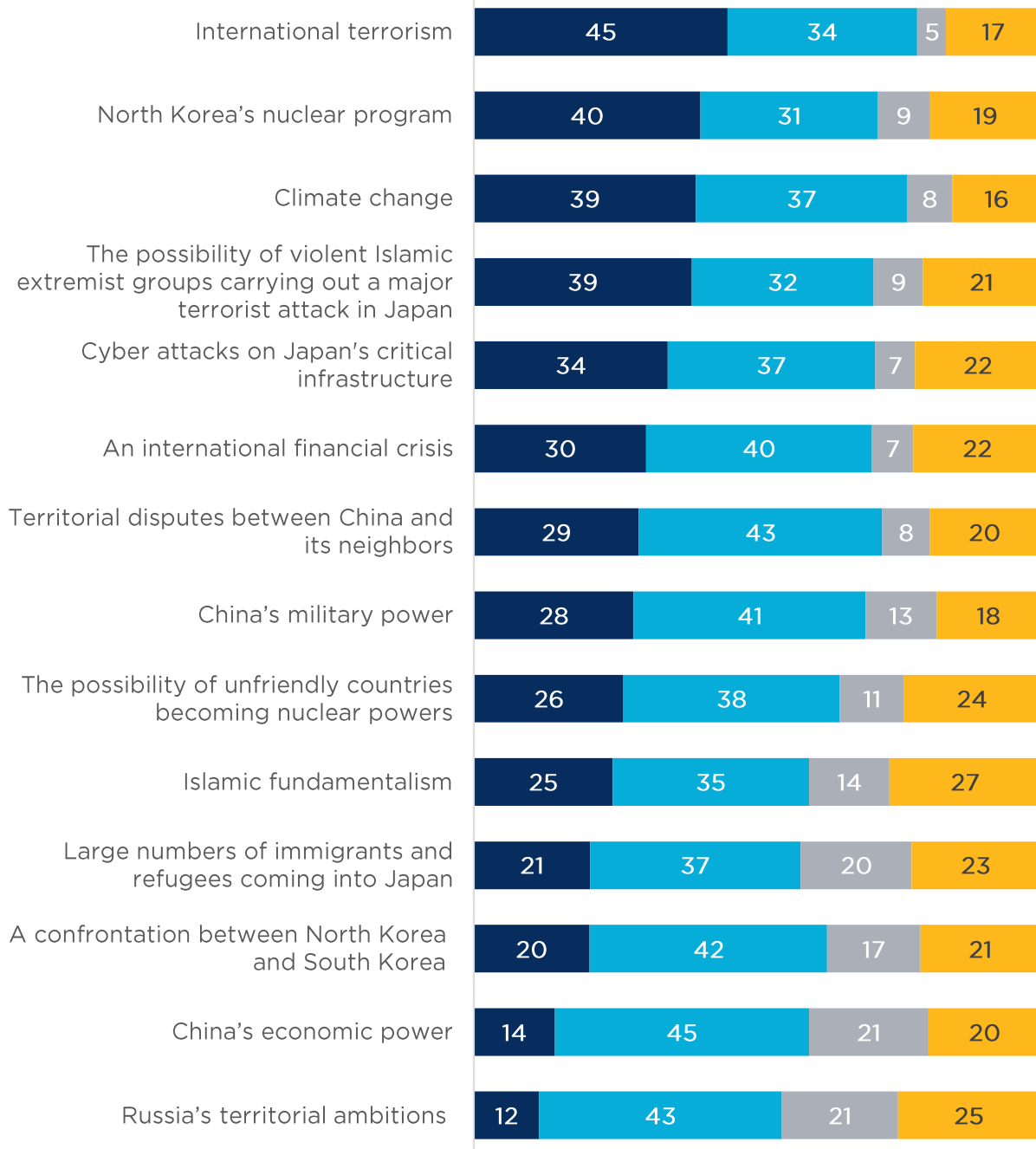
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Appendix Figure 5

## Possible Threats: Japanese

Below is a list of possible threats to the vital interest of Japan in the next 10 years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.

■ Critical ■ Important but not critical ■ Not an important threat at all ■ Not Sure/Decline



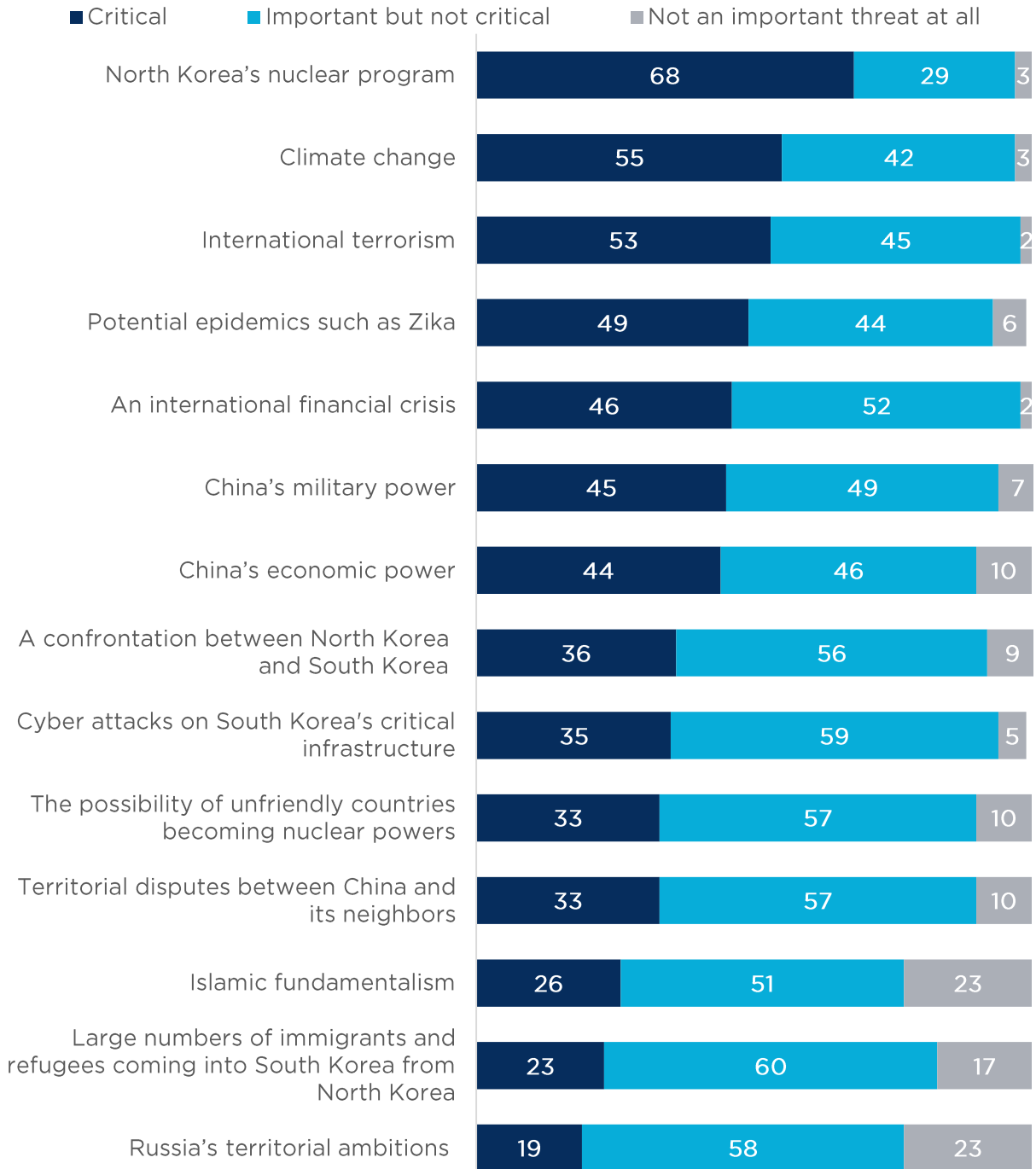
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Appendix Figure 6

## Possible Threats: South Koreans

Below is a list of possible threats to the vital interest of South Korea in the next 10 years. For each one, please select whether you see this as a critical threat, an important but not critical threat, or not an important threat at all.



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