Intensity of negative impressions of the Government of China on the rise
National survey released August, 2019
Project 2019-1480
Negative impressions of the Government of China continue to trend up, while Canadians continue to have mostly negative impressions of Huawei. Canadians are most likely to say they support Canada banning Huawei from participating in Canada’s 5G telecommunications network and are most likely to feel that Canada has done a poor or very poor job at managing the arrest of Meng Wanzhou, CFO at Huawei.

- **Negative impressions of the Government of China continue to trend up among Canadians** - Nine in ten Canadians say they have a somewhat negative (34%) or negative (56%; 44% in 2018; 38% in 2016) impression of the Government of China, while three per cent have a somewhat positive and one per cent have a positive impression. Seven per cent are unsure.

- **A majority of Canadians continue to say they have a negative or somewhat negative impression of Huawei** – Just under seven in ten Canadians say they have a somewhat negative (34%) or negative (35%; down from 44% in 2018) impression of the Chinese telecommunications and smartphone maker Huawei, while just over one in ten say they have a positive (three per cent) or somewhat positive (eight per cent) impression. Twenty per cent are unsure.

- **Canadians are most likely to say Canada should ban Huawei from participating in the 5G telecommunications network in Canada** – Just over one in two Canadians (52%) say Canada should ban Huawei from participating in the 5G telecommunications network in Canada, while 19 per cent (16% in 2018) say Canada should allow Huawei to participate in the 5G telecommunications network in Canada. Twenty-nine per cent are unsure.

- **Canadians are most likely to say that the Government of Canada has done a poor or very poor job at managing the situation with Meng Wanzhou** – Asked how they feel about the Government of Canada’s related to the arrest of Huawei CFO at the request of the United States, over four in ten Canadians say it has done a poor (21%) or very poor job (19%) at managing the situation. Twenty-seven per cent say the government has done an average job, while one in four say it has done a good (20%) or very good (five per cent) job. Seven per cent are unsure.

These observations are based on 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 July 28th to July 30th, 2019 as part of an omnibus survey.

This study was commissioned by The Globe and Mail and the research was conducted by Nanos Research.
Impressions of Chinese Government

**Net score**

**2019**
- Positive: 34%
- Somewhat positive: 56%
- Negative: 7%
- Unsure: 7%
- Net score: -86.2

**2018**
- Positive: 7%
- Somewhat positive: 39%
- Negative: 44%
- Unsure: 8%
- Net score: -74.4

**2016**
- Positive: 9%
- Somewhat positive: 38%
- Negative: 38%
- Unsure: 13%
- Net score: -66.3

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

**QUESTION** – Do you have a positive, somewhat positive, somewhat negative or negative impression of the Government of China?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Impressions of Chinese Government

QUESTION – Do you have a positive, somewhat positive, somewhat negative or negative impression of the Government of China?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
**Impressions of Huawei**

**Net score**

- 2019: -58.7
- 2018: -52.8

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

**QUESTION** – Do you have a positive, somewhat positive, somewhat negative or negative impression of the Chinese telecommunications and smartphone maker, Huawei?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Impressions of Huawei

**Net score**

-58.7

- Positive: 35%
- Somewhat positive: 8%
- Somewhat negative: 3%
- Negative: 20%
- Unsure: 34%

**Negative/Somewhat negative**

- Atlantic (n=100): 55.8%
- Quebec (n=250): 63.5%
- Ontario (n=300): 76.5%
- Prairies (n=200): 68.2%
- British Columbia (n=150): 74.2%
- Male (n=536): 70.0%
- Female (n=464): 68.3%
- 18 to 34 (n=260): 65.8%
- 35 to 54 (n=363): 73.2%
- 55 plus (n=377): 68.0%

*Weighted to the true population proportion. Charts may not add up to 100 due to rounding.

**QUESTION** – Do you have a positive, somewhat positive, somewhat negative or negative impression of the Chinese telecommunications and smartphone maker, Huawei?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
Canada should allow Huawei to participate in the 5G telecommunications network in Canada

Canada should ban Huawei from participating in the 5G telecommunications network in Canada

Unsure

**QUESTION** – Some people think that Canada should follow its own path and allow Chinese telecom firm Huawei to participate in the 5G telecommunications network in Canada other people think that we should ban, like the United States and Australia, the Chinese telecom firm Huawei from participating in the 5G telecommunications network in Canada. Which of these two views, if either, best reflects your personal opinion?
Participation of Huawei in telecommunications network in Canada

QUESTION – Some people think that Canada should follow its own path and allow Chinese telecom firm Huawei to participate in the 5G telecommunications network in Canada other people think that we should ban, like the United States and Australia, the Chinese telecom firm Huawei from participating in the 5G telecommunications network in Canada. Which of these two views, if either, best reflects your personal opinion?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
QUESTION – As you may know, Canada arrested Huawei chief financial officer Meng Wanzhou at the request of the United States on allegations of fraud relating to violations of US sanctions against Iran. China says that the arrest is politically motivated and an attempt to undermine Huawei’s commercial growth. Do you think the Government of Canada has done a very good, good, average, poor or very poor job at managing this situation?

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, July 28th to July 30th, 2019, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.
METHODOLOGY

F: PATH FORWARD!
W: WINNING CONDITIONS
V: VALIDATE
T: TEST IDEAS
R: REVIEW RESEARCH
D: DIAGNOSE ENV
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 July 28th to July 30th, 2019 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 this survey is ±3.1 percentage points, 19 times out of 20.

This study was commissioned by the Globe and Mail and the research was conducted by Nanos Research.

Note: Charts may not add up to 100 due to rounding.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization who commissioned the research</strong></td>
<td>Globe and Mail</td>
</tr>
<tr>
<td><strong>Final Sample Size</strong></td>
<td>1,000 Randomly selected individuals.</td>
</tr>
<tr>
<td><strong>Margin of Error</strong></td>
<td>±3.1 percentage points, 19 times out of 20.</td>
</tr>
<tr>
<td><strong>Mode of Survey</strong></td>
<td>RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey</td>
</tr>
<tr>
<td><strong>Sampling Method Base</strong></td>
<td>The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.</td>
</tr>
<tr>
<td><strong>Demographics (Captured)</strong></td>
<td>Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.</td>
</tr>
<tr>
<td><strong>Fieldwork/Validation</strong></td>
<td>Individuals were recruited using live interviews with live supervision to validate work, the research questions were administered online</td>
</tr>
<tr>
<td><strong>Number of Calls</strong></td>
<td>Maximum of five call backs.</td>
</tr>
<tr>
<td><strong>Time of Calls</strong></td>
<td>Individuals were called between 12:5:30 pm and 6:30-9:30pm local time for the respondent.</td>
</tr>
<tr>
<td><strong>Field Dates</strong></td>
<td>July 28th to July 30th, 2019.</td>
</tr>
<tr>
<td><strong>Language of Survey</strong></td>
<td>The survey was conducted in both English and French.</td>
</tr>
<tr>
<td><strong>Standards</strong></td>
<td>This report exceeds the standards set forth by CRIC, ESOMAR and AAPOR.</td>
</tr>
</tbody>
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<tr>
<td><strong>Weighting of Data</strong></td>
<td>The results were weighted by age and gender using the latest Census information (2016) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure</td>
</tr>
<tr>
<td><strong>Screening</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Excluded Demographics</strong></td>
<td>Individuals younger than 18 years old; individuals without land or cell lines, and individuals without internet access could not participate.</td>
</tr>
<tr>
<td><strong>Stratification</strong></td>
<td>By age and gender using the latest Census information (2016) 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.</td>
</tr>
<tr>
<td><strong>Estimated Response Rate</strong></td>
<td>13 percent, consistent with industry norms.</td>
</tr>
<tr>
<td><strong>Question Order</strong></td>
<td>Question order in the preceding report reflects the order in which they appeared in the original questionnaire.</td>
</tr>
<tr>
<td><strong>Question Content</strong></td>
<td>This was module two of an omnibus survey. Module one was about the election, Module three was about federal party leaders.</td>
</tr>
<tr>
<td><strong>Question Wording</strong></td>
<td>The questions in the preceding report are written exactly as they were asked to individuals.</td>
</tr>
<tr>
<td><strong>Survey Company</strong></td>
<td>Nanos Research</td>
</tr>
<tr>
<td><strong>Contact</strong></td>
<td>Contact Nanos Research for more information or with any concerns or questions. <a href="http://www.nanos.co">http://www.nanos.co</a> Telephone:(613) 234-4666 ext. 237 Email: <a href="mailto:info@nanosresearch.com">info@nanosresearch.com</a>.</td>
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</table>
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A public relations consultancy for executives and organizations with images to create, issues to manage, relationships to build, and reputations to protect in a digitally disrupted era. We serve senior leaders with PR counsel that is both strategic and social, informed by a deep understanding of analytics, content, communities, media, sustainability and technology.

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This international joint venture between dimap and Nanos brings together top research and data experts from North American and Europe to deliver exceptional data intelligence to clients. The team offers data intelligence services ranging from demographic and sentiment microtargeting; consumer sentiment identification and decision conversion; and, data analytics and profiling for consumer persuasion.

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<tr>
<th>Question - Do you have a positive, somewhat positive, somewhat negative or negative impression of the Government of China?</th>
<th>Total</th>
<th>Unwgt N</th>
<th>1000</th>
<th>100</th>
<th>250</th>
<th>300</th>
<th>200</th>
<th>150</th>
<th>536</th>
<th>464</th>
<th>260</th>
<th>363</th>
<th>377</th>
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<tbody>
<tr>
<td>Positive</td>
<td>%</td>
<td>0.5</td>
<td>0.0</td>
<td>1.0</td>
<td>0.6</td>
<td>0.0</td>
<td>0.6</td>
<td>0.9</td>
<td>0.2</td>
<td>0.7</td>
<td>0.5</td>
<td>0.5</td>
<td></td>
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<tr>
<td>Somewhat positive</td>
<td>%</td>
<td>3.1</td>
<td>4.2</td>
<td>4.6</td>
<td>3.1</td>
<td>1.3</td>
<td>2.0</td>
<td>4.0</td>
<td>2.1</td>
<td>4.1</td>
<td>2.0</td>
<td>3.3</td>
<td></td>
</tr>
<tr>
<td>Somewhat negative</td>
<td>%</td>
<td>33.7</td>
<td>49.4</td>
<td>38.7</td>
<td>30.1</td>
<td>35.5</td>
<td>19.3</td>
<td>32.4</td>
<td>34.9</td>
<td>29.5</td>
<td>37.1</td>
<td>33.6</td>
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<tr>
<td>Negative</td>
<td>%</td>
<td>56.1</td>
<td>37.4</td>
<td>48.3</td>
<td>59.3</td>
<td>56.5</td>
<td>74.5</td>
<td>58.1</td>
<td>54.1</td>
<td>52.0</td>
<td>55.6</td>
<td>59.2</td>
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<tr>
<td>Unsure</td>
<td>%</td>
<td>6.7</td>
<td>9.0</td>
<td>7.4</td>
<td>7.0</td>
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<td>3.5</td>
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<td>8.7</td>
<td>13.7</td>
<td>4.9</td>
<td>3.4</td>
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<tr>
<th>Region</th>
<th>Gender</th>
<th>Age</th>
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<tr>
<td>Canada</td>
<td>2019-07</td>
<td>Atlantic</td>
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<tr>
<td>Somewhat positive</td>
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<td>8.0</td>
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<tr>
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<td>%</td>
<td>34.0</td>
</tr>
<tr>
<td>Negative</td>
<td>%</td>
<td>35.2</td>
</tr>
<tr>
<td>Unsure</td>
<td>%</td>
<td>20.3</td>
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