



Japan China Korea Public Opinion Analysis

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Methodology

Research was conducted via an internet research panel between November and December 2014

*This research was a part of the project of Security Studies Unit, PARI at the University of Tokyo, funded by Ministry of Foreign Affairs. The working paper was presented at the international workshop “Alliance at Crossroads” on Feb. 24 2015.

Research Overview

| | <u>Research Period</u> | <u>Number of Respondents</u> | <u>Allocation of Samples</u> | <u>Local Research Partners</u> |
|--------------|------------------------|------------------------------|---|--------------------------------|
| Japan | November, 2014 | N = 2,000 | Age (20-60s) Geographical Location (3 major cities, others) Education (College graduates, others) Ensured N=100 sample allocation for segments defined by the above elements | Macromill, Inc. |
| China | December, 2014 | N = 2,000 | Age (20-50s) Geographical Location (Tier1 & Tier 2 cities) Education (College graduates, others) Ensured N=100 sample allocation for segments defined by the above elements | Macromill China |
| Korea | December, 2014 | N = 2,000 | Age (20-50s) Geographical Location (Greater Seoul, others) Education (College graduates, others) Ensured N=100 sample allocation for segments defined by the above elements | Macromill-embraim |

Contents

- **Theoretical Background**

- Japan's Public Opinion
- China's Public Opinion
- Korea's Public Opinion
- Public Opinion towards the Japan-US & Korea-US Alliance

Theoretical Background: East Asian Paradox

Does “East Asian Paradox” Exist?

- Preconditions: Economic Peace, Interdependency Theory
= States that are economically interdependent don't fight each other
→ This is the case for East Asia as well
- Current Situation: Hostile, sometimes aggressive policies are taken, while economic interdependency continues to deepen. The ratio of intra-trade in East Asia has not reached at the level of EU.
- Existing arguments
 1. The school of Realism does not accept economic peace theory and argue that states use economic interdependence for power struggle
 2. Some views that history issues and cultural background prevents regional cooperation
 3. Some find causes in each government's populism and the rise of nationalism.

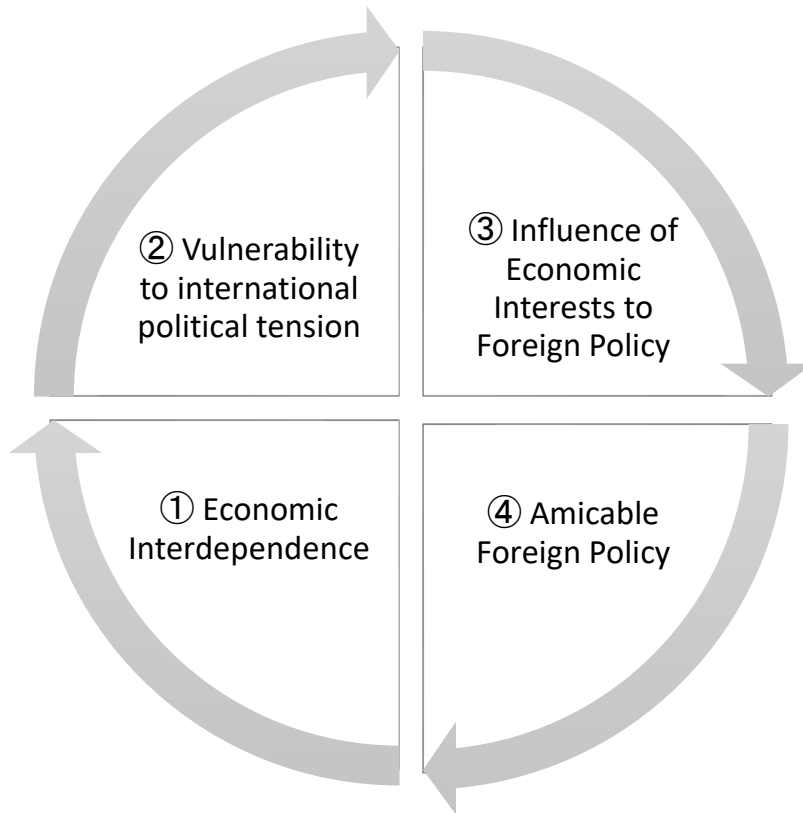
How does this research see “East Asian Paradox” and why?

- State as unitary, rational actor is no longer viable
(administration faces two different kinds of pressures (nationalism vs. economic interest, cf. Iida 2013))
- Segment analysis is needed, focusing on the economic interest in trade and investment.
- Macro indicators of trade and investment is not enough. Types of goods (B to B/ B to C), trade (trading company or direct access) matters by knowledge from qualitative research.
- Whether the opinion of vested interest groups concerning trade and foreign investment affect government's policy is important

Hypothesis→

Theoretical Background: Hypothesis

Focus of Today



Economic
Interdependence
Virtuous Circle

| | Japan China | China Japan | Japan Korea | Korea Japan |
|---|----------------|----------------|----------------|----------------|
| ① Economic Interdependence | ○ | ○ | ○ | ○ |
| ② Vulnerability to International Political Tensions | ○ | × | × | × |
| ③ Influence of Economic Interest to Foreign Policy | △ | × | × | △ |
| ④ Amicable Foreign Policy | × | × | × | × |

Contents

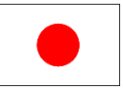
- Theoretical Background

- **Japan's Public Opinion**

- China's Public Opinion

- Korea's Public Opinion

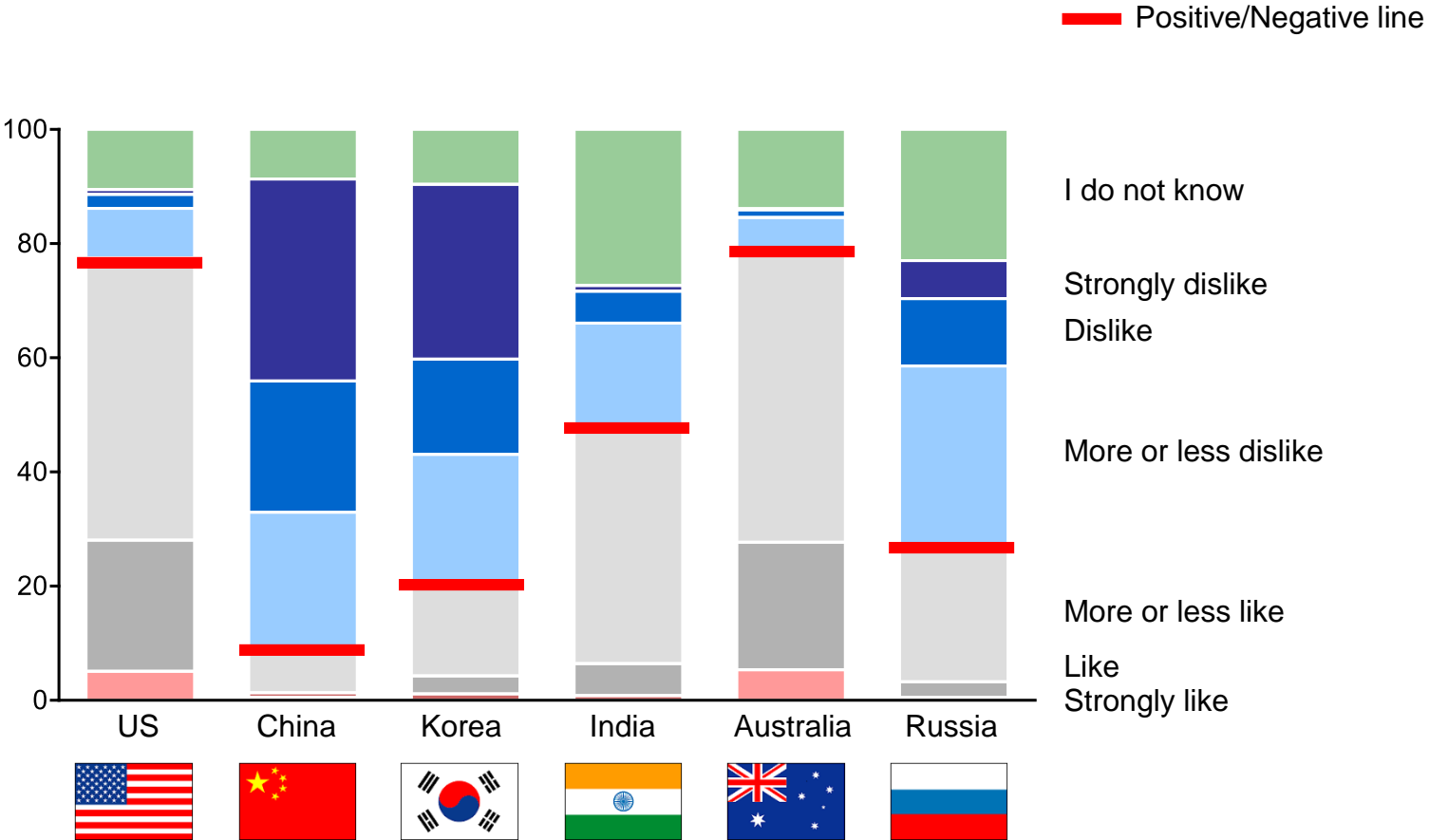
- Public Opinion towards the Japan-US & Korea-US Alliance



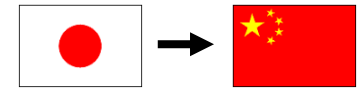
Perception of the Japanese Public

Perception towards the US and Australia is positive while China, Korea and Russia is negative. Anti-Chinese perceptions stand out with less than 10% responding positively

General Perception towards Foreign Countries* (%)



* Weighted back based on 2010 census regarding age, education, and geographical location



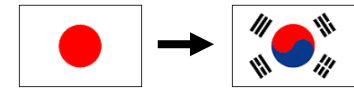
Perception towards China by Segment

Anti-Chinese perception is strong across most segments while the young and women are relatively more positive. Attitudes towards own income growth strongly affects anti-Chinese perceptions

Perceptions towards China by Segment

(Deviation from the average positive + mildly negative perceptions, % points)

| | | | | | |
|--------------------------------|-------------------|-------------------|-----------------------------------|-------------------|-------------------|
| Age | 20's | 30's | 40's | 50's | 60's |
| | +6.9 | +4.1 | -3.7 | -2.2 | -5.2 |
| Gender | Male | Female | | | |
| | -4.0 | +4.3 | | | |
| Education | Junio High School | High School | Junior coledge/ other training | Coledge Graduate | Post Graduate |
| | -2.3 | -3.2 | +0.3 | +1.0 | +3.8 |
| Annual Income (10,000, JPY) | Bellow 300 | 301~500 | 501~700 | 701~1,000 | Over 1,000 |
| | +0.4 | +0.0 | -0.5 | +3.1 | -5.5 |
| Income growth expectation | Strongly decrease | Somewhat decrease | No change | Somewhat increase | Strongly increase |
| | -9.5 | -2.2 | +3.7 | +1.3 | +18.5 |



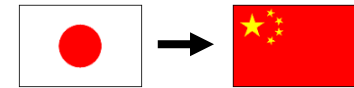
Perception towards Korea by Segment

Perception towards Korea is also relatively more positive for the young and women segments, and is affected by attitudes towards own income growth expectations

Perceptions towards Korea by Segment

(Deviation from the average positive + mildly negative perceptions, % points)

| | | | | | |
|--------------------------------|-------------------|-------------------|-----------------------------------|-------------------|-------------------|
| Age | 20's | 30's | 40's | 50's | 60's |
| | +3.8 | +5.3 | -3.5 | -0.5 | -5.2 |
| Gender | Male | Female | | | |
| | -8.5 | +9.2 | | | |
| Education | Junio High School | High School | Junior coledge/ other training | Coledge Graduate | Post Graduate |
| | 3.9 | -3.6 | +4.8 | -0.5 | +2.0 |
| Annual Income (10,000, JPY) | Bellow 300 | 301~500 | 501~700 | 701~1,000 | Over 1,000 |
| | +0.0 | -0.1 | +4.1 | -2.8 | -2.0 |
| Income growth expectation | Strongly decrease | Somewhat decrease | No change | Somewhat increase | Strongly increase |
| | -6.3 | -4.9 | +3.1 | +4.2 | +13.1 |



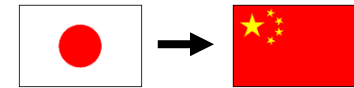
The Impact of Overseas Exposure

Perception towards China improves as overseas exposure increases. This trend is more evident in individual tendencies such language capability existence of close friends/acquaintances

Perceptions towards China by Degrees of Overseas Exposure

(Deviation from the average positive + mildly negative perceptions, % points)

| | | | | | |
|----------------------------------|------------------------|-------------------------|-------------------------------|-----------|--------------------|
| Visits | No visiting experience | 1~3 times | 4~5 times | 6~9 times | More than 10 times |
| | -2.8 | -2.1 | -1.3 | +2.2 | +10.0 |
| Living experience (1 year+) | No | Yes | | | |
| | -0.5 | +7.1 | | | |
| Foreign Language | No proficiency | Basic | Not fluent | Fluent | |
| | -5.8 | +1.4 | +7.7 | +13.1 | |
| Overseas Relationships | No relations | Friends & acquaintances | Close friends & acquaintances | Family | |
| | -3.5 | +9.5 | +12.0 | +3.0 | |
| Overseas Biz Ties | No ties | Some ties | Strong ties | | |
| | -1.9 | +4.1 | +4.3 | | |
| Overseas Biz Growth Expectations | Decrease | No change | Increase | | |
| | -29.1 | -2.5 | +12.0 | | |

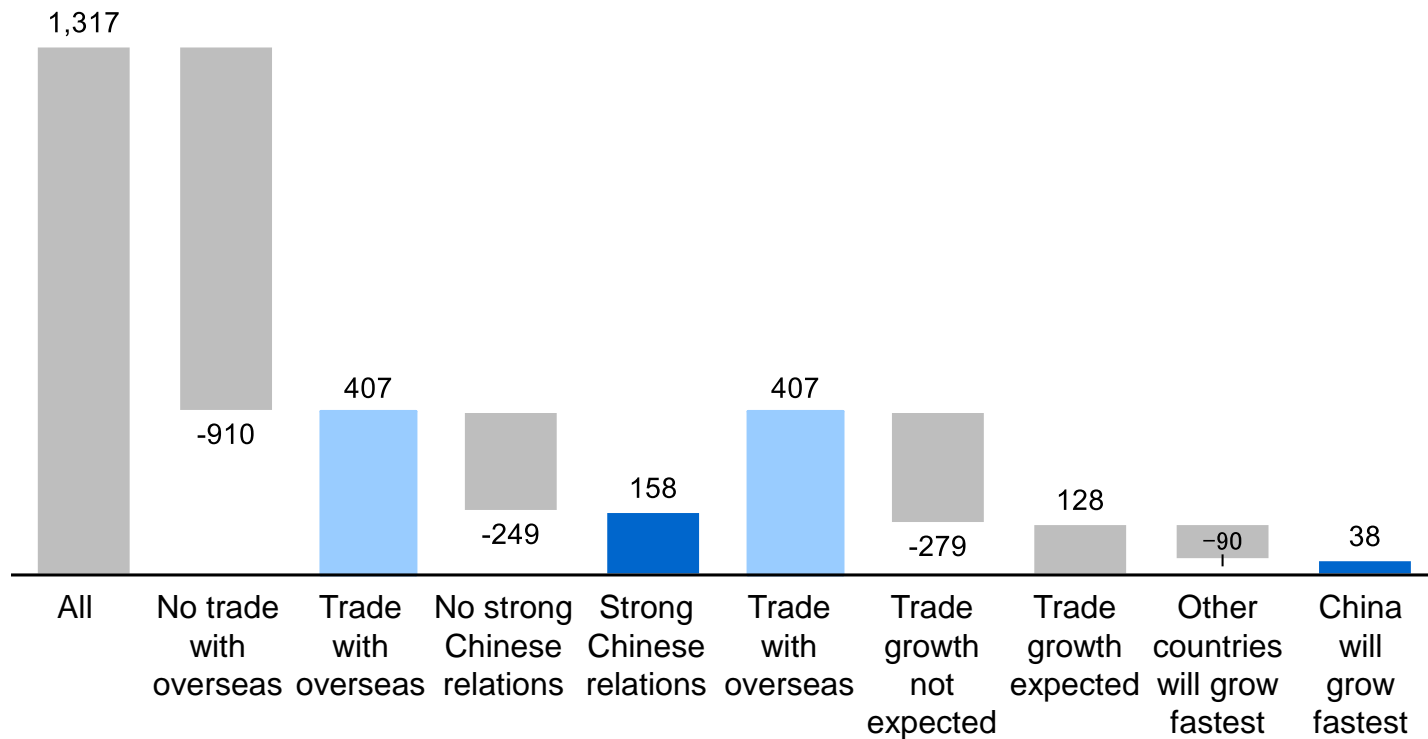


Impact of economic interdependence

Perception towards China improves along with deepening of economic relations with the international market

Economic relations and Perception towards with China

(Person)

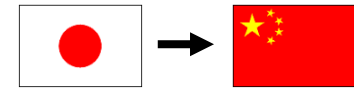


Positive + mild negative perception towards China (%)

| | | | | | | | | | |
|-----|------------------------|---------------------|-----------------------------|--------------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong Chinese relations | Strong Chinese relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | China will grow fastest |
| 35 | 33 | 39 | 37 | 42 | 39 | 33 | 51 | 53 | 45 |

Delta from overall average (Points)

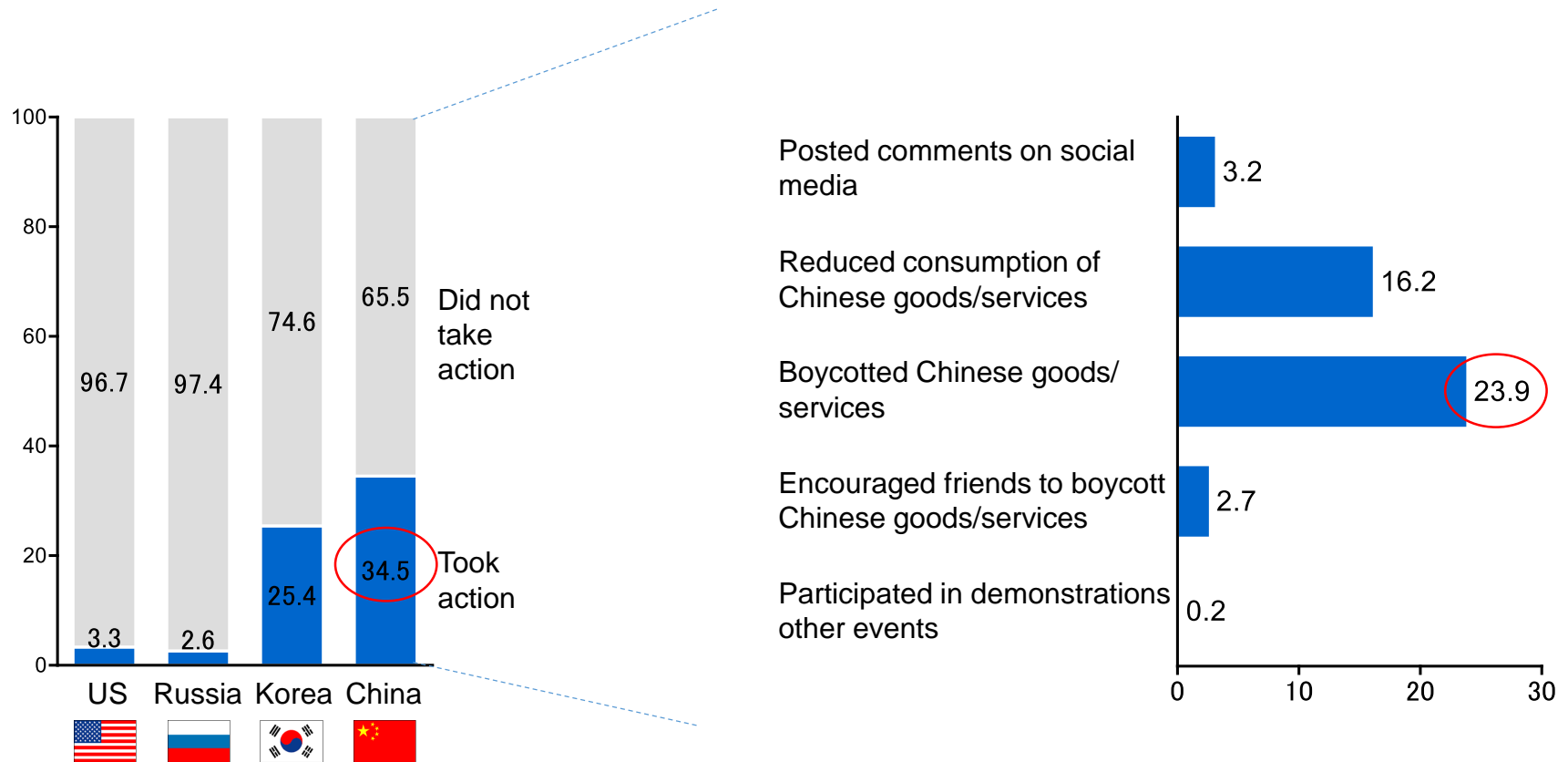
| | | | | | | | | | |
|-----|------------------------|---------------------|-----------------------------|--------------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong Chinese relations | Strong Chinese relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | China will grow fastest |
| - | -2 | +4 | +2 | +7 | +4 | -1 | +16 | +19 | +10 |



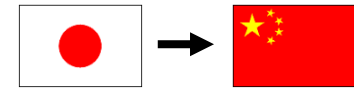
International Relations and Personal Action

More people take action reflecting international developments against China and Korea. About a fourth of the population boycotted Chinese goods/services

What action did you take reflecting international developments with the following countries in the last year* (%)



* Weighted back based on 2010 census regarding age, education, and geographical location



Elements that Drive Perception (China)

Stated importance towards China is low across the board, while elements such as “strong” and “energetic” stand out, suggesting the Japanese public feels threatened

Perception towards China

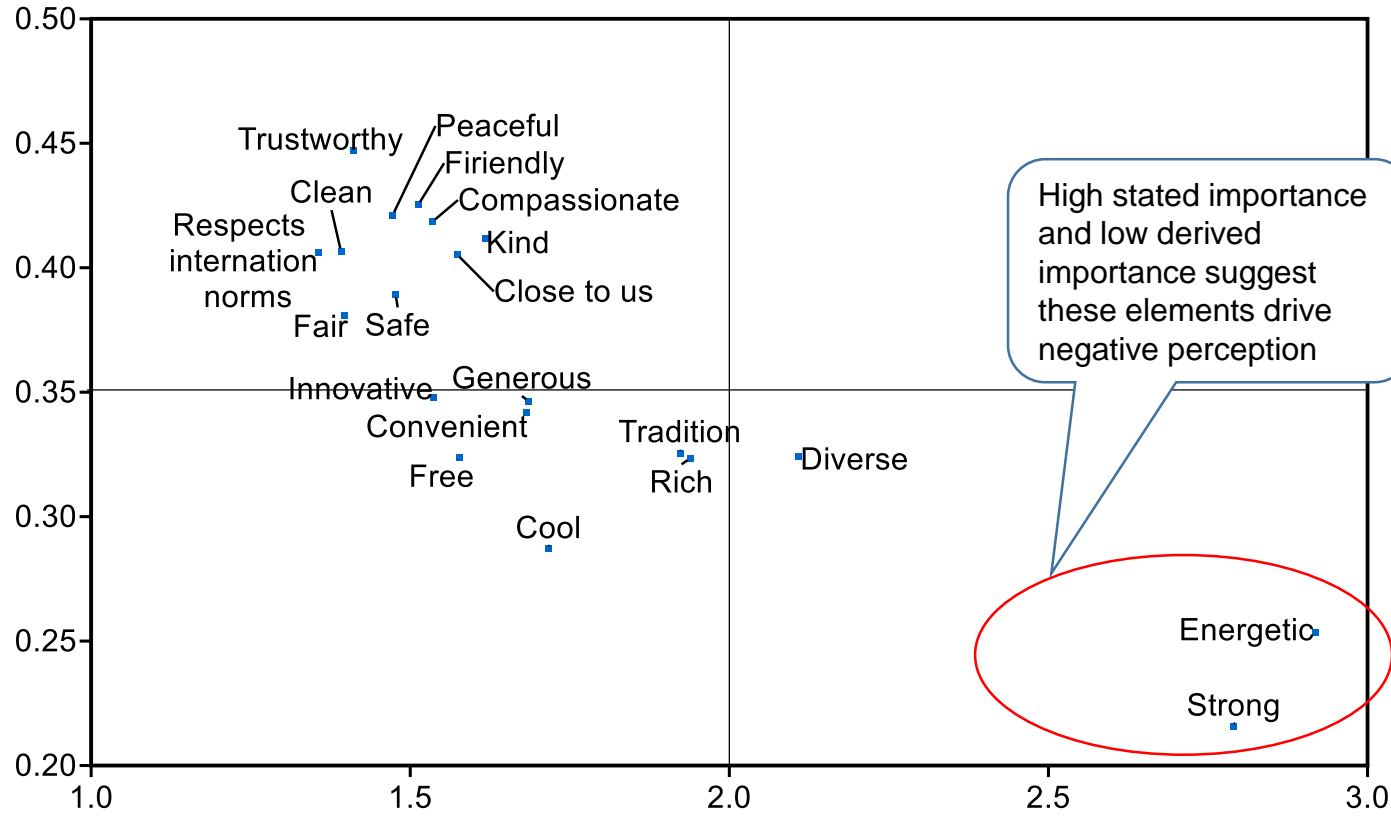
Derived Importance

(Correlation with positive perception towards China)

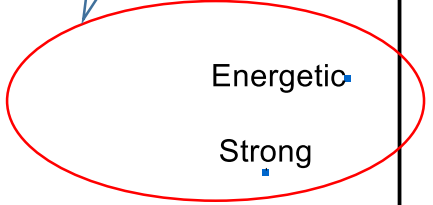
High



Low



High stated importance and low derived importance suggest these elements drive negative perception

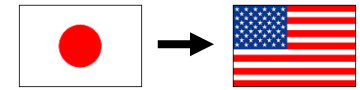


Low



High

Stated Importance
(Average score of each elements)

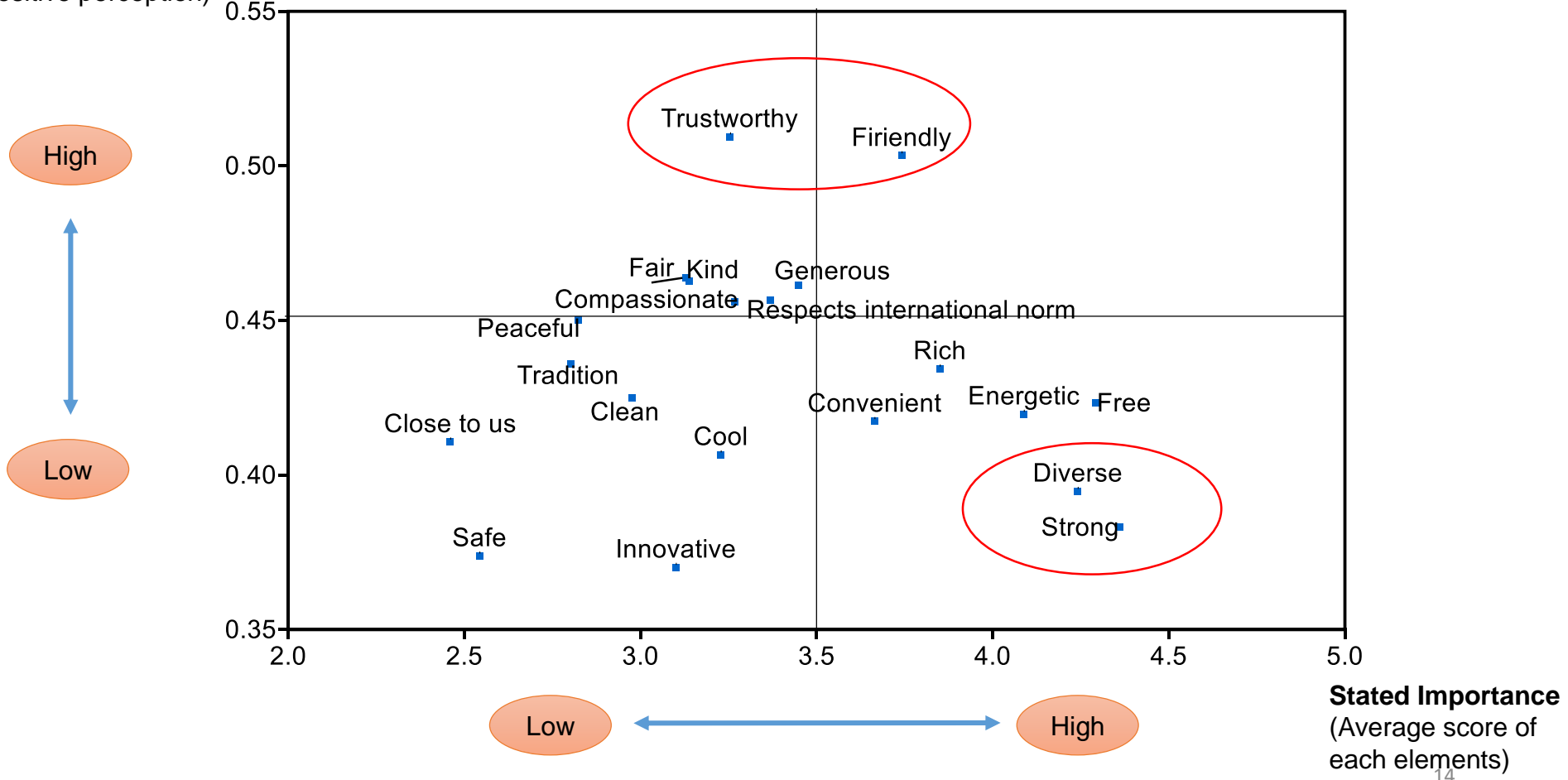


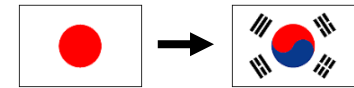
Elements that Drive Perception (US)

Perception towards the US driven elements such as “trustworthy” and “friendly” suggesting the US’s position as an ally is critical

Perception towards the US

Derived Importance
(Correlation with positive perception)



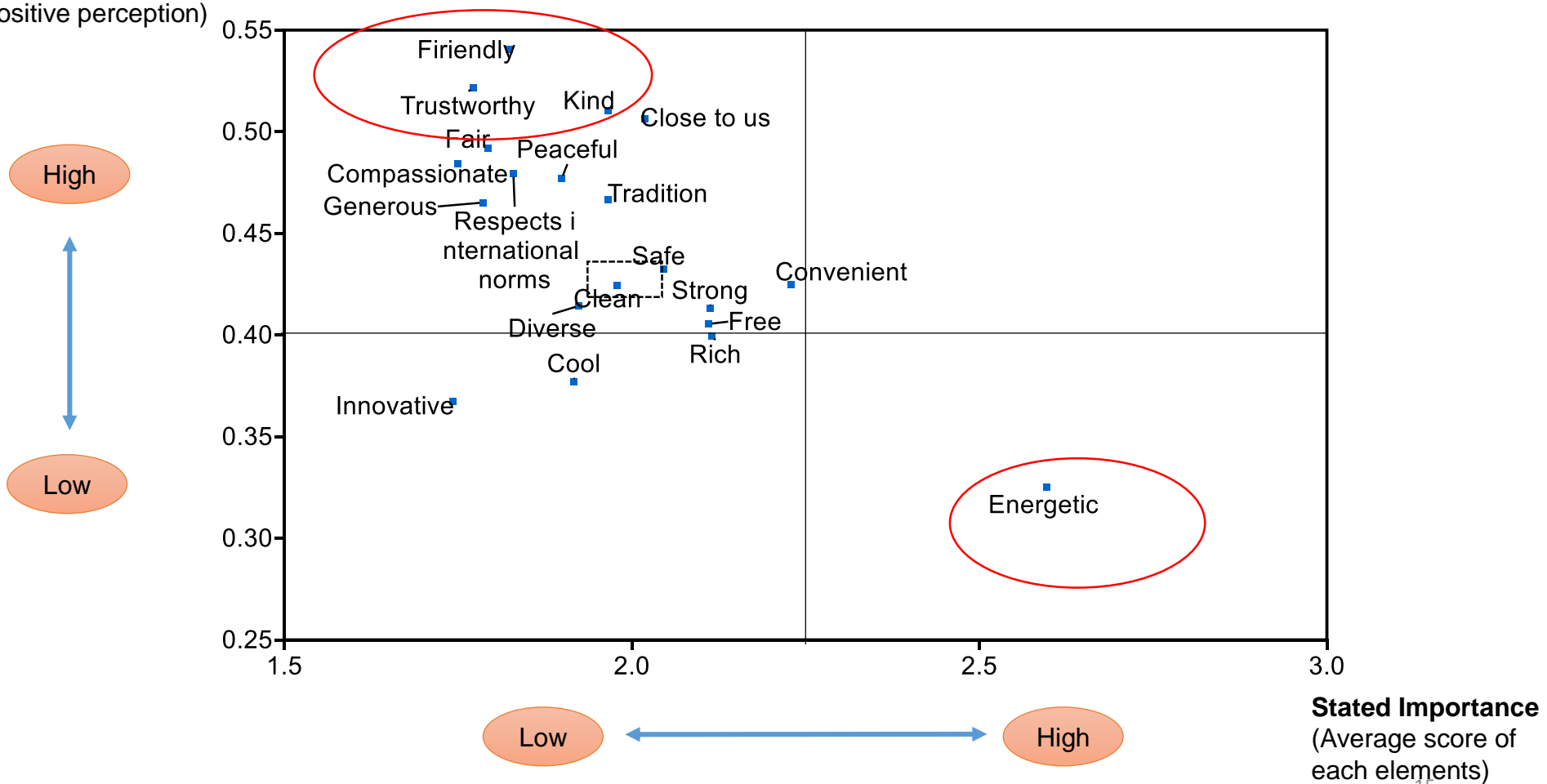


Elements that Drive Perception (Korea)

While perception towards Korea is not high across the board, elements such as “trustworthy” and “friendly”, and “kind” are driving positive perception

Perception towards Korea

Derived Importance
(Correlation with positive perception)



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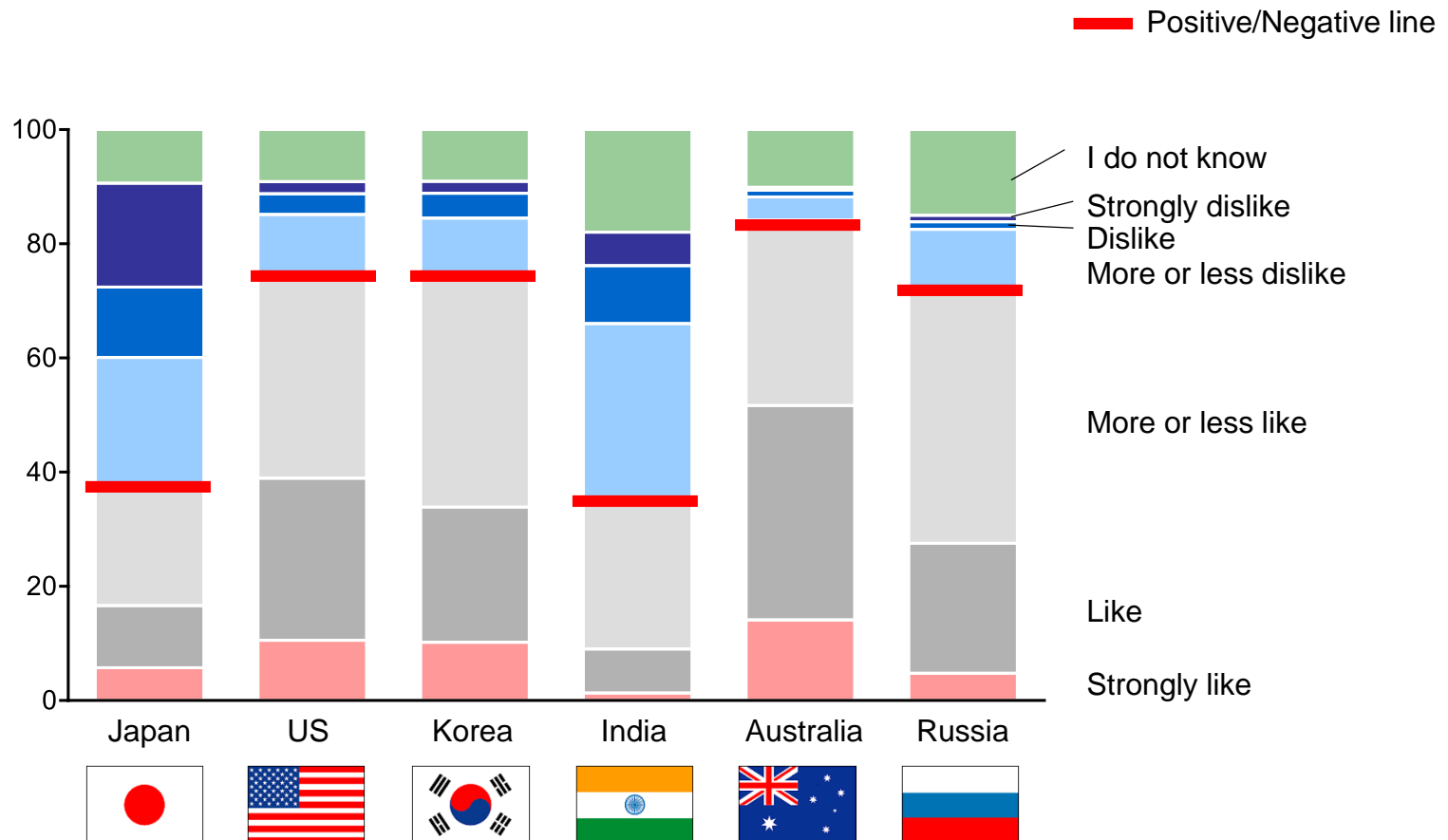


Perception of the Chinese Public

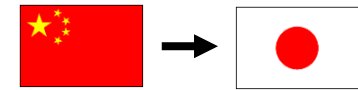
Perception towards Japan and India more negative than others. Width and depth of negative sentiment towards Japan stand out

General Perception towards Foreign Countries*

(%)



* Weighted back based on 2010 census regarding age, education



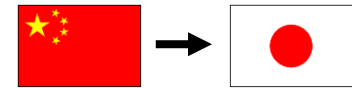
Perception towards Japan by Segment

Perception towards Japan improves in the 50+ age, highly educated, high income segments, as well as people working at international firms

Perceptions towards Japan by Segment

(Deviation from the average positive perception, % points)

| | | | | | |
|---------------------------------|----------------------|-----------------------------------|---------------------------|--------------------------|----------------------|
| Age | 20's | 30's | 40's | 50/60's | |
| | -1.5 | -2.5 | -6.8 | +5.4 | |
| Gender | Male | Female | | | |
| | -0.9 | +0.9 | | | |
| Education | High School | Junior coledge/ other training | Coledge Graduate | Post Graduate | |
| | -13.0 | -6.5 | +8.4 | +5.8 | |
| Monthly Income (RMB) | Bellow 5,000 | 5,000~10,000 | 10,000~20,000 | 20,000~40,000 | Over 40,000 |
| | -13.0 | -10.5 | +1.1 | +15.8 | +19.5 |
| Income growth expectation | Strongly decrease | Somewhat decrease | No change | Somewhat increase | Strongly increase |
| | -10.9 | -14.6 | -2.1 | +0.4 | +16.4 |
| Occupation type | Government | State Owened Enterprise | Private Sector Company | International Company | Self Employed |
| | -1.0 | +2.4 | +2.8 | +14.4 | -14.2 |



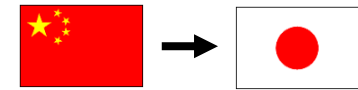
Impact of Overseas Exposure

Perception towards Japan improves significantly as overseas exposure increases.

Perceptions towards China by Degrees of Overseas Exposure

(Deviation from the average positive perceptions, % points)

| | | | | | |
|----------------------------------|------------------------|-------------------------|-------------------------------|-----------|--------------------|
| Visits | No visiting experience | 1~3 times | 4~5 times | 6~9 times | More than 10 times |
| | -20.6 | +2.9 | +25.7 | +22.4 | +28.1 |
| Living experience (1 year+) | No | Yes | | | |
| | -6.2 | +22.6 | | | |
| Foreign Language | No proficiency | Basic | Not fluent | Fluent | |
| | -24.1 | -5.4 | +5.6 | +29.1 | |
| Overseas Relationships | No relations | Friends & acquaintances | Close friends & acquaintances | Family | |
| | -12.9 | +1.1 | +17.7 | +11.9 | |
| Overseas Biz Ties | No ties | Some ties | Strong ties | | |
| | -10.8 | +7.5 | +24.0 | | |
| Overseas Biz Growth Expectations | Decrease | No change | Increase | | |
| | -10.1 | +3.9 | +16.6 | | |

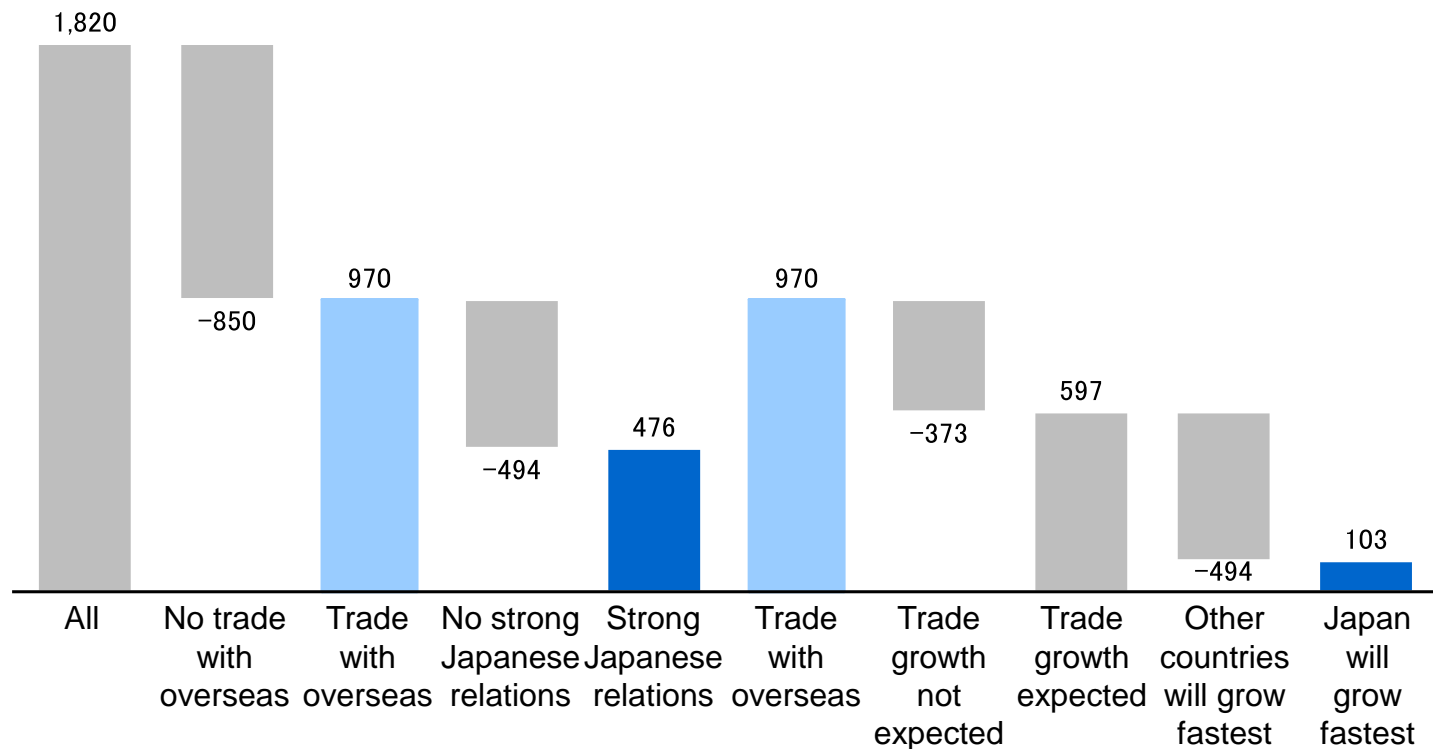


Impact of Economic Interdependence

Perception towards Japan improves significantly as economic relations with Japan deepens

Economic relations and Perception towards with Japan

(Person)

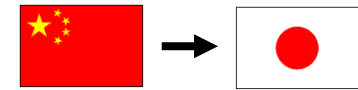


Positive perception towards Japan (%)

| | | | | | | | | | |
|-----|------------------------|---------------------|---------------------|------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong relations | Strong relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | Japan will grow fastest |
| 45 | 33 | 55 | 39 | 73 | 55 | 47 | 61 | 55 | 88 |

Delta from overall average (Points)

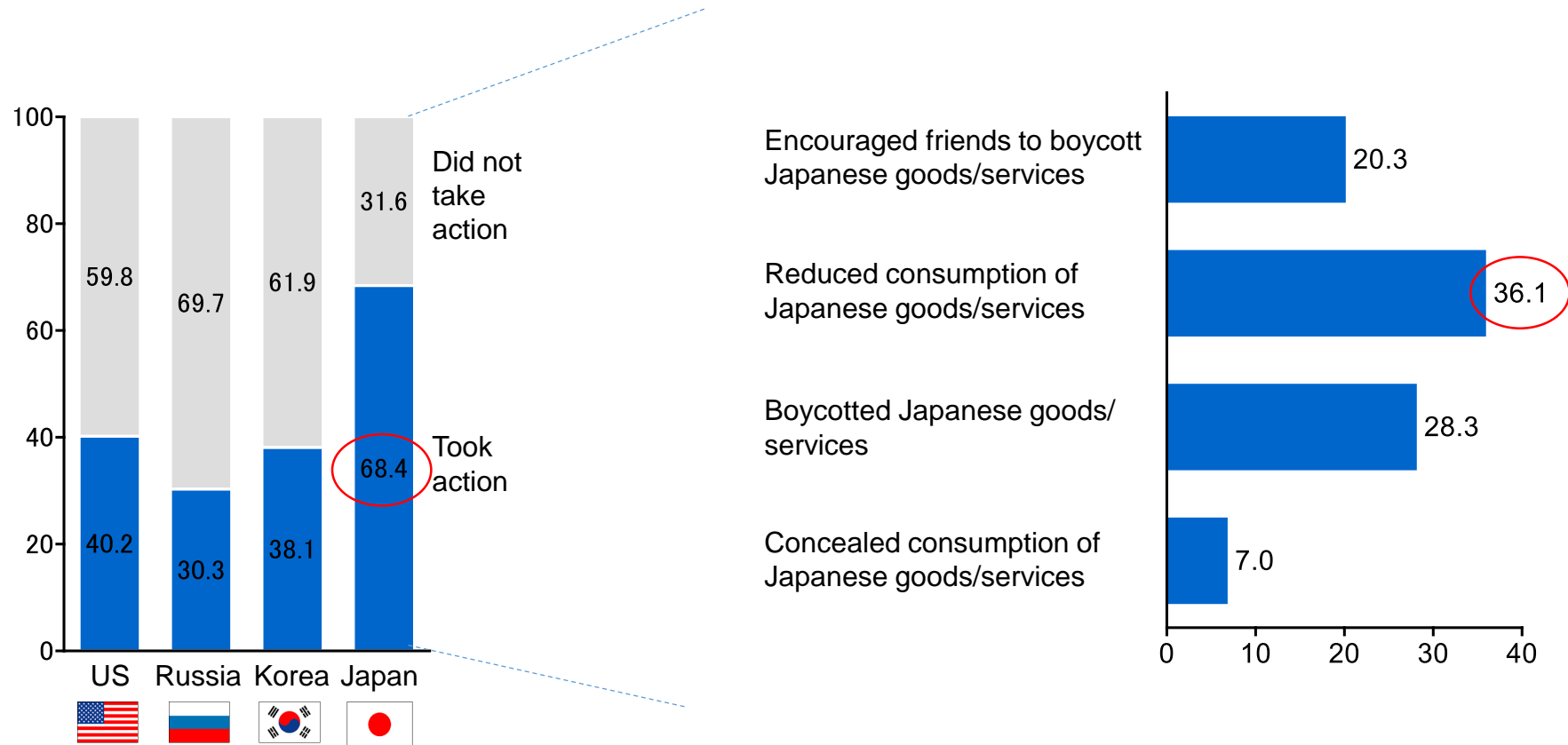
| | | | | | | | | | |
|-----|------------------------|---------------------|---------------------|------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong relations | Strong relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | Japan will grow fastest |
| - | -12 | +10 | -6 | +28 | +10 | +2 | +16 | +10 | +43 |



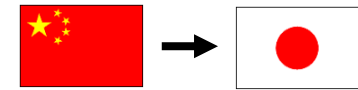
International Relations and Personal Action

People taking action in Japan related international developments are much higher than other countries. 36% of said they reduced spending on Japanese goods

What action did you take reflecting international developments with the following countries in the last year*
(%)



* Weighted back based on 2010 census regarding age and education

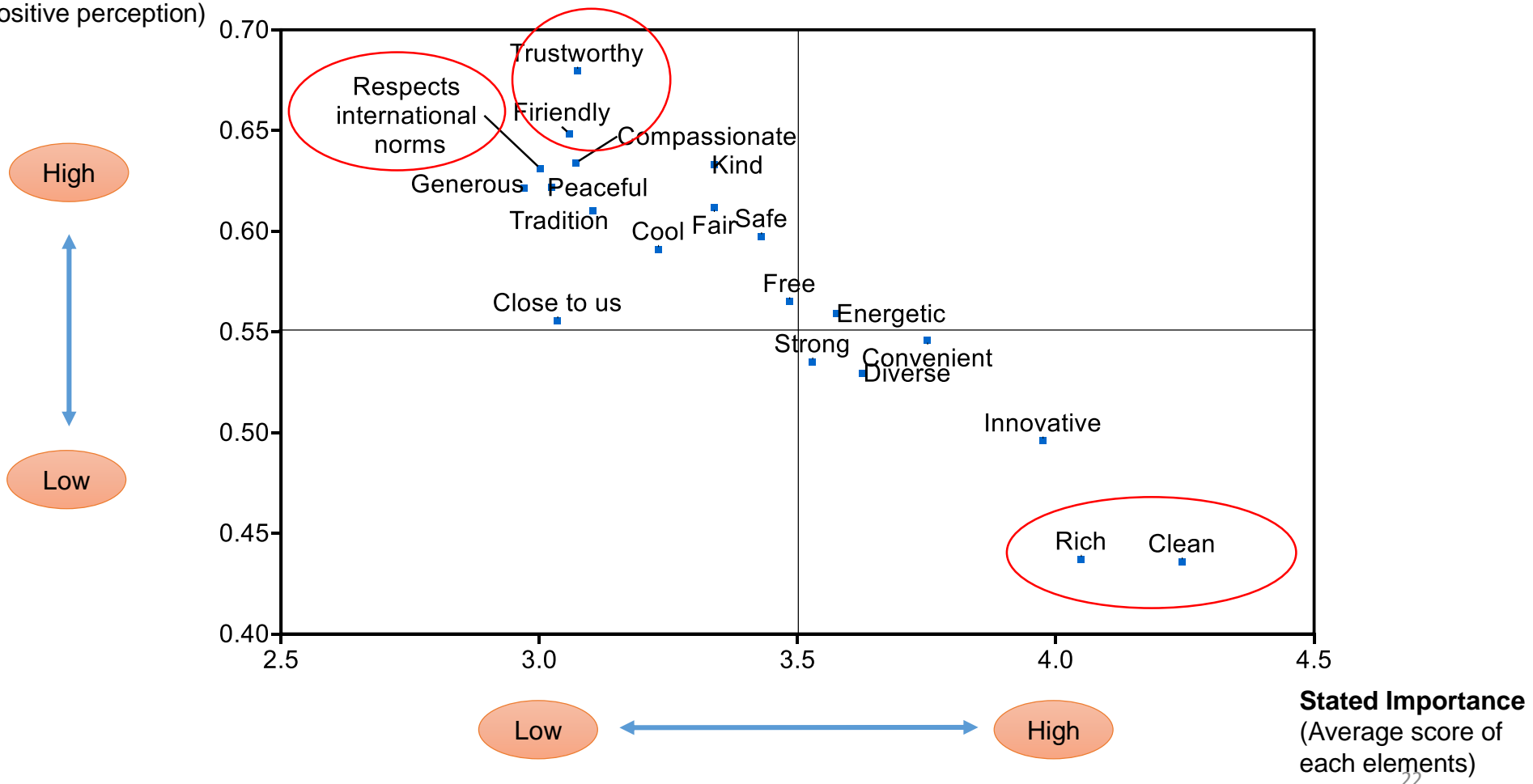


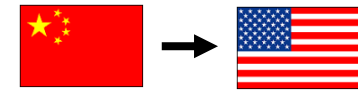
Elements that Drive Perception (Japan)

Perception towards Japan worsens in the most critical elements, suggesting the need for a complete overhaul in Japan's public diplomacy towards China

Perception towards Japan

Derived Importance
(Correlation with positive perception)



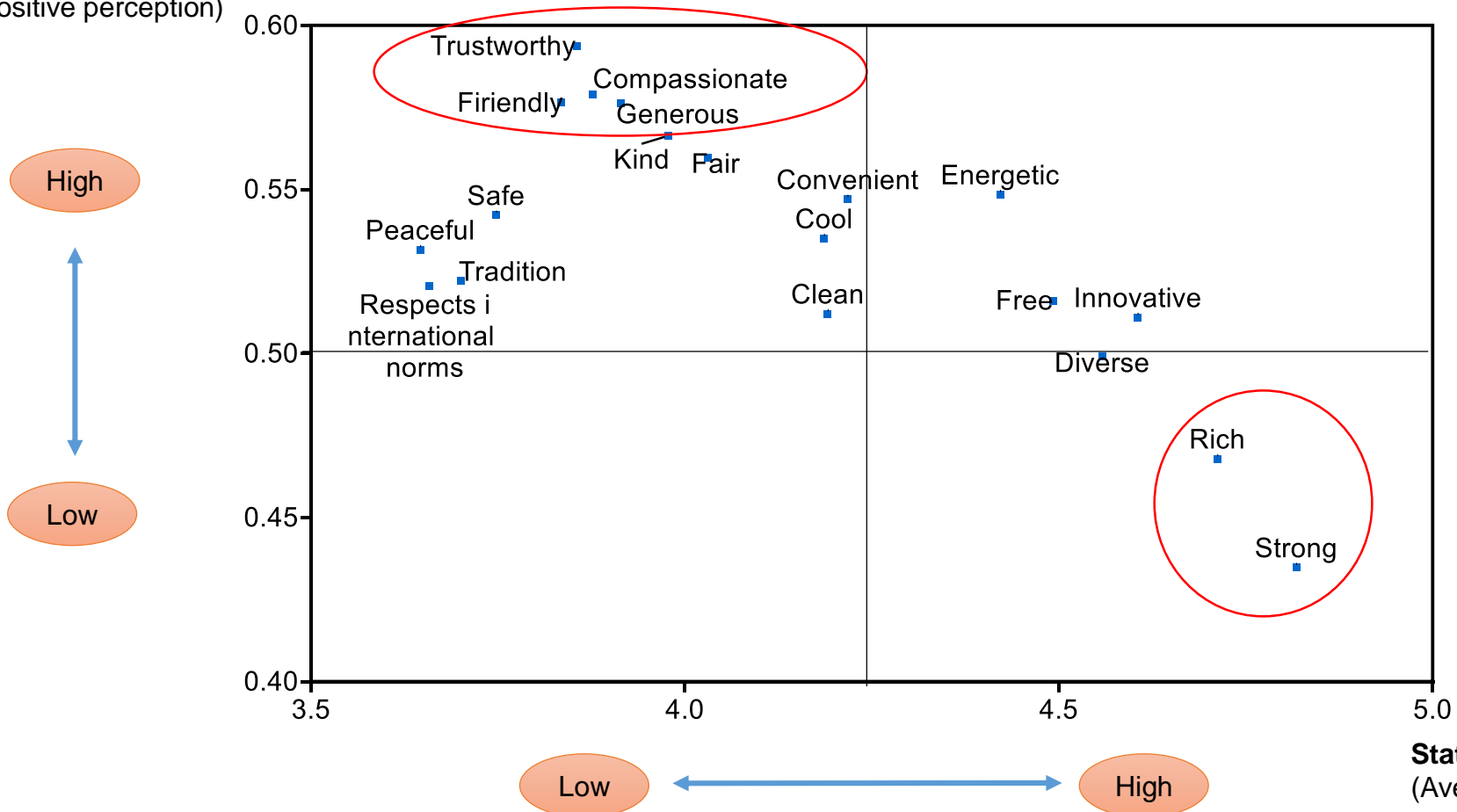


Elements that Drive Perception (US)

Elements that drive positive perception are soft elements such as “trustworthy”, “friendly”, and “compassionate”

Perception towards the US

Derived Importance
(Correlation with positive perception)



Stated Importance
(Average score of each elements)

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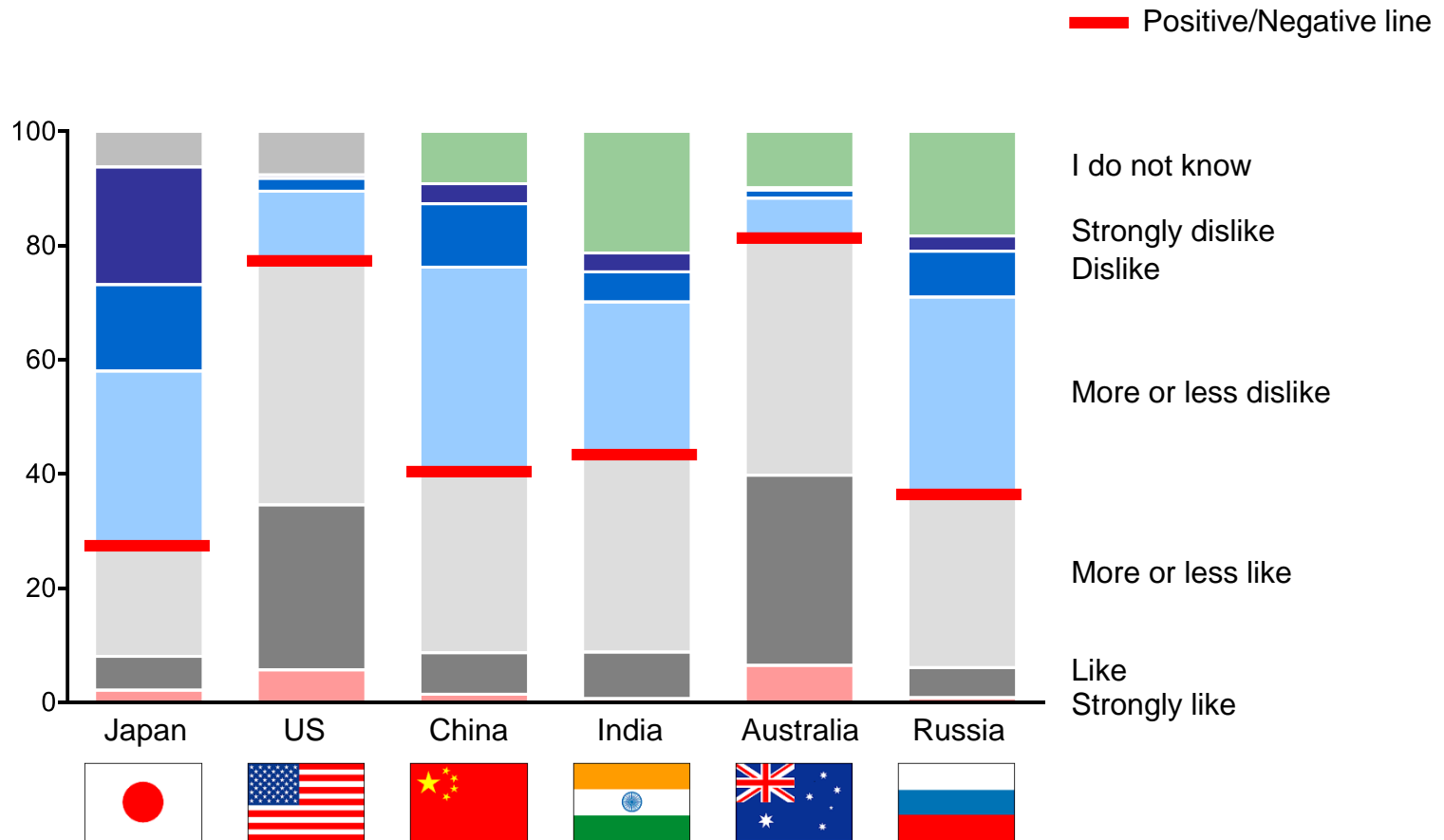


Perception of the Korean Public

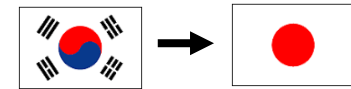
Perception towards the US and Australia is positive while negative sentiments towards Japan stand out in its width and depth

General Perception towards Foreign Countries*

(%)



* Weighted back based on 2010 census regarding age, education, and geographical location



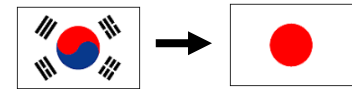
Perception towards Japan by Segment

Perception towards Japan improves in the young, highly educated segments.
 Attitudes towards own income growth affects perceptions as well.

Perceptions towards Japan by Segment

(Deviation from the average positive perceptions, % points)

| | | | | | |
|--------------------------------------|----------------------|---------------------------|-----------------------------------|--------------------------|----------------------|
| Age | 20's | 30's | 40's | 50's | 60's |
| | +9.3 | +6.8 | -4.3 | -5.6 | -6.3 |
| Gender | Male | Female | | | |
| | -0.6 | +0.5 | | | |
| Education | Junior High School | High School | Junior coledge/ other training | Coledge Graduate | Post Graduate |
| | -21.0 | -3.6 | -1 | +2.9 | +3.3 |
| Monthly Income (Thousand, KRW) | Bellow 1,000 | 1,001 ~ 3,000 | 3,001 ~ 6,000 | 6,001 ~ 10,000 | More than 10,000 |
| | -2.7 | -4.1 | +1.7 | -0.6 | +9.3 |
| Income growth expectation | Strongly decrease | Somewhat decrease | No change | Somewhat increase | Strongly increase |
| | -5.6 | -4.3 | -2.6 | +6.1 | +5.8 |
| Occupation type | Government | State Owned Enterprise | Private Sector Company | International Company | Self Employed |
| | +0.7 | +10.7 | +1.7 | +11.9 | -0.7 |

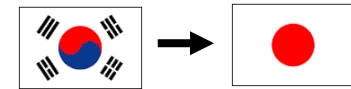


Impact of Overseas Exposure

Perception towards Japan improves as overseas exposure increases. This trend is more evident in individual tendencies such language capability

Perceptions towards Japan by Degrees of Overseas Exposure (Deviation from the average positive perceptions, % points)

| | | | | | |
|----------------------------------|------------------------|-------------------------|-------------------------------|-----------|--------------------|
| Visits | No visiting experience | 1~3 times | 4~5 times | 6~9 times | More than 10 times |
| | -8.1 | +1.0 | -0.9 | +7.5 | +11.3 |
| Living experience (1 year+) | No | Yes | | | |
| | -1.7 | +13.2 | | | |
| Foreign Language | No proficiency | Basic | Not fluent | Fluent | |
| | -14.0 | -1.9 | +8.4 | +24.6 | |
| Overseas Relationships | No relations | Friends & acquaintances | Close friends & acquaintances | Family | |
| | -5.6 | +2.7 | +7.7 | +3.3 | |
| Overseas Biz Ties | No ties | Some ties | Strong ties | | |
| | -2.2 | +5.7 | +12.8 | | |
| Overseas Biz Growth Expectations | Decrease | No change | Increase | | |
| | +5.3 | +1.6 | +14.2 | | |

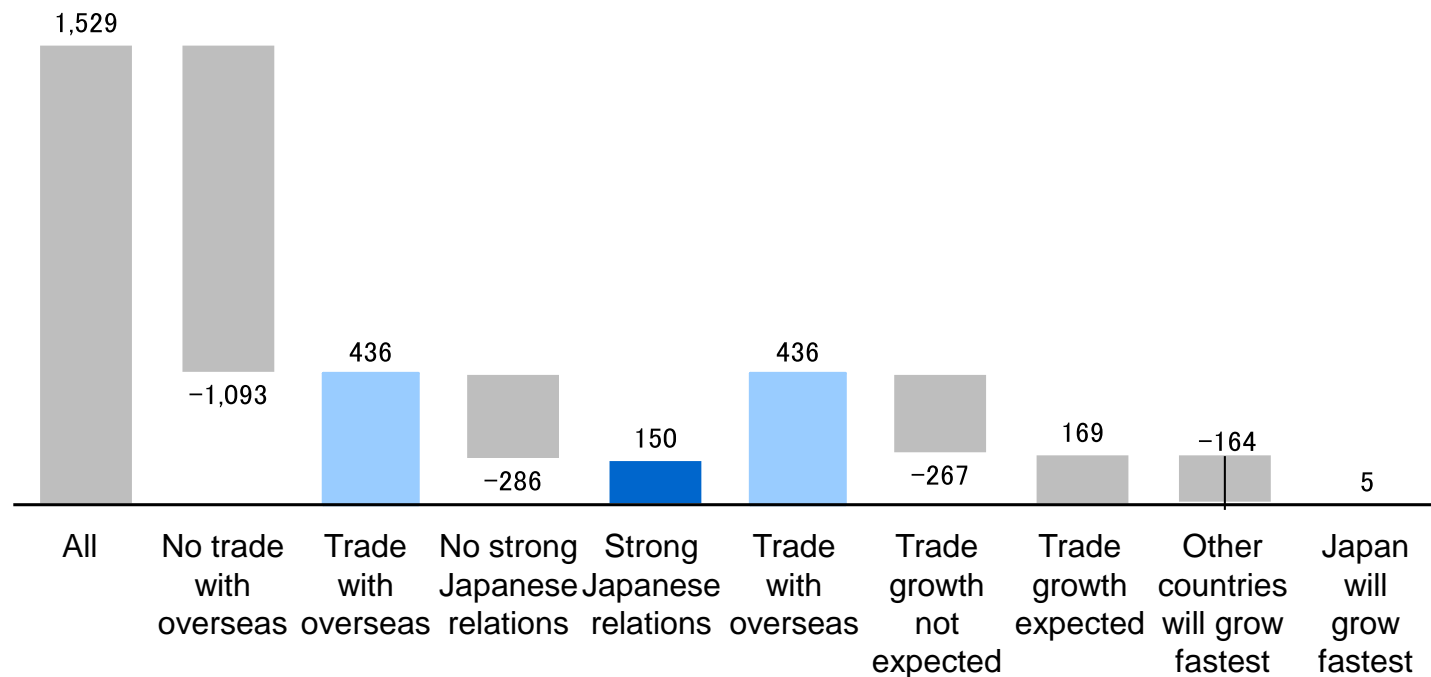


Impact of Economic Interdependence

Perception towards Japan improves as economic interdependence deepens

Economic relations and Perception towards with Japan

(Person)

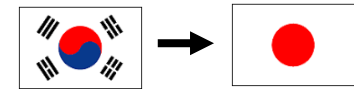


Positive perception towards Japan (%)

| | | | | | | | | | |
|-----|------------------------|---------------------|------------------------------|---------------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong Japanese relations | Strong Japanese relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | Japan will grow fastest |
| 29 | 27 | 36 | 29 | 48 | 36 | 31 | 43 | 44 | 80 |

Delta from overall average (Points)

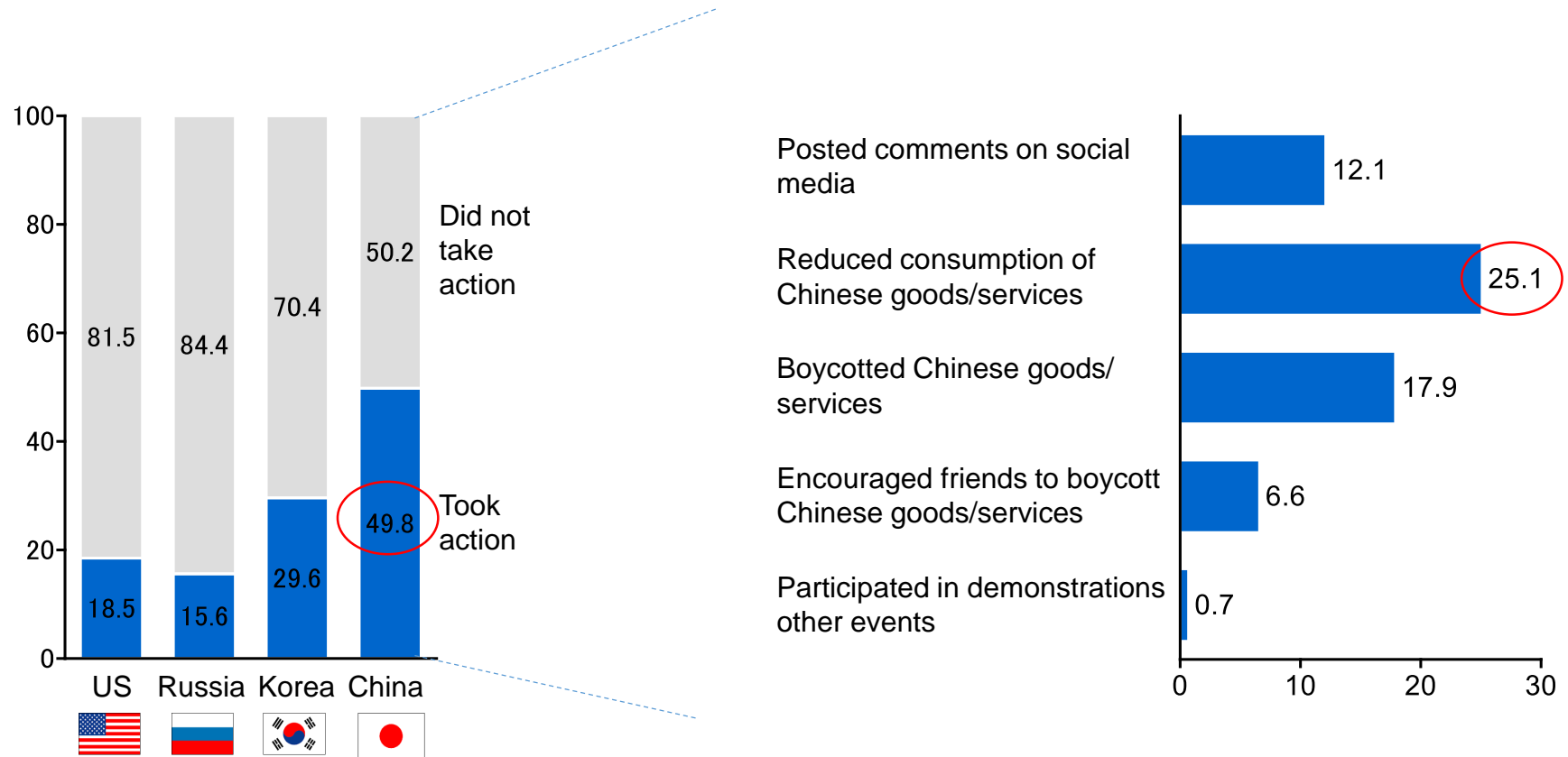
| | | | | | | | | | |
|-----|------------------------|---------------------|------------------------------|---------------------------|---------------------|---------------------------|-----------------------|-----------------------------------|-------------------------|
| All | No trade with overseas | Trade with overseas | No strong Japanese relations | Strong Japanese relations | Trade with overseas | Trade growth not expected | Trade growth expected | Other countries will grow fastest | Japan will grow fastest |
| - | -3 | +6 | 0 | +19 | +6 | +2 | +14 | +14 | +51 |



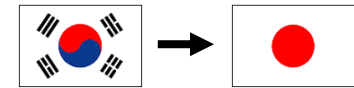
International Relations and Personal Action

People taking action against Japan and China stand out. Close to half of Koreans took personal action towards Japan reflecting an international development

What action did you take reflecting international developments with the following countries in the last year* (%)



* Weighted back based on 2010 census regarding age, education, and geographical location

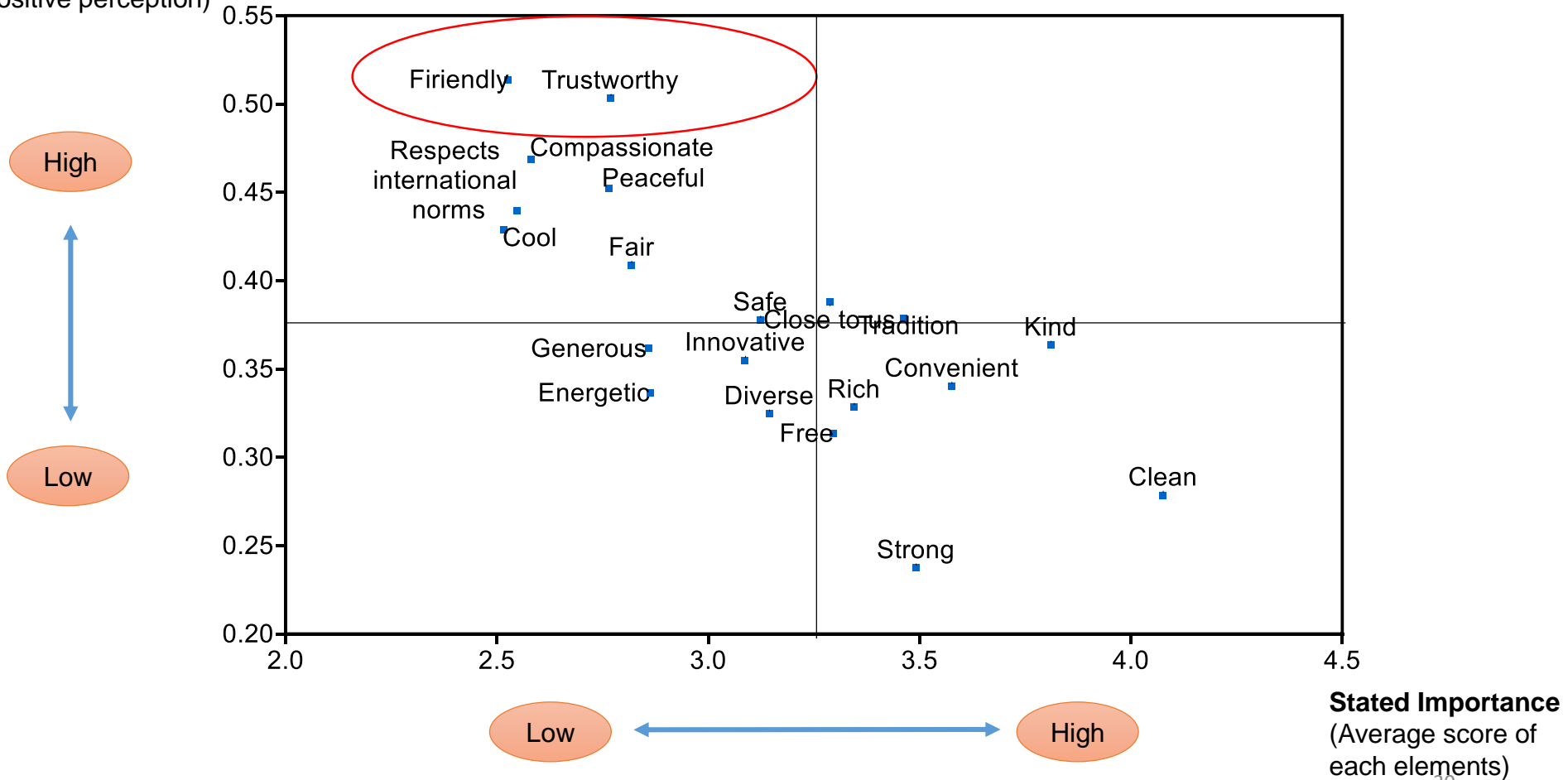


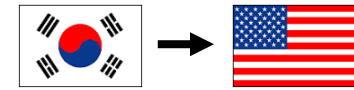
Elements that Drive Perception (Japan)

Perception towards Japan is driven by elements such as “friendly” and “trustworthy” which are rated quite low

Perception towards Japan

Derived Importance
(Correlation with positive perception)



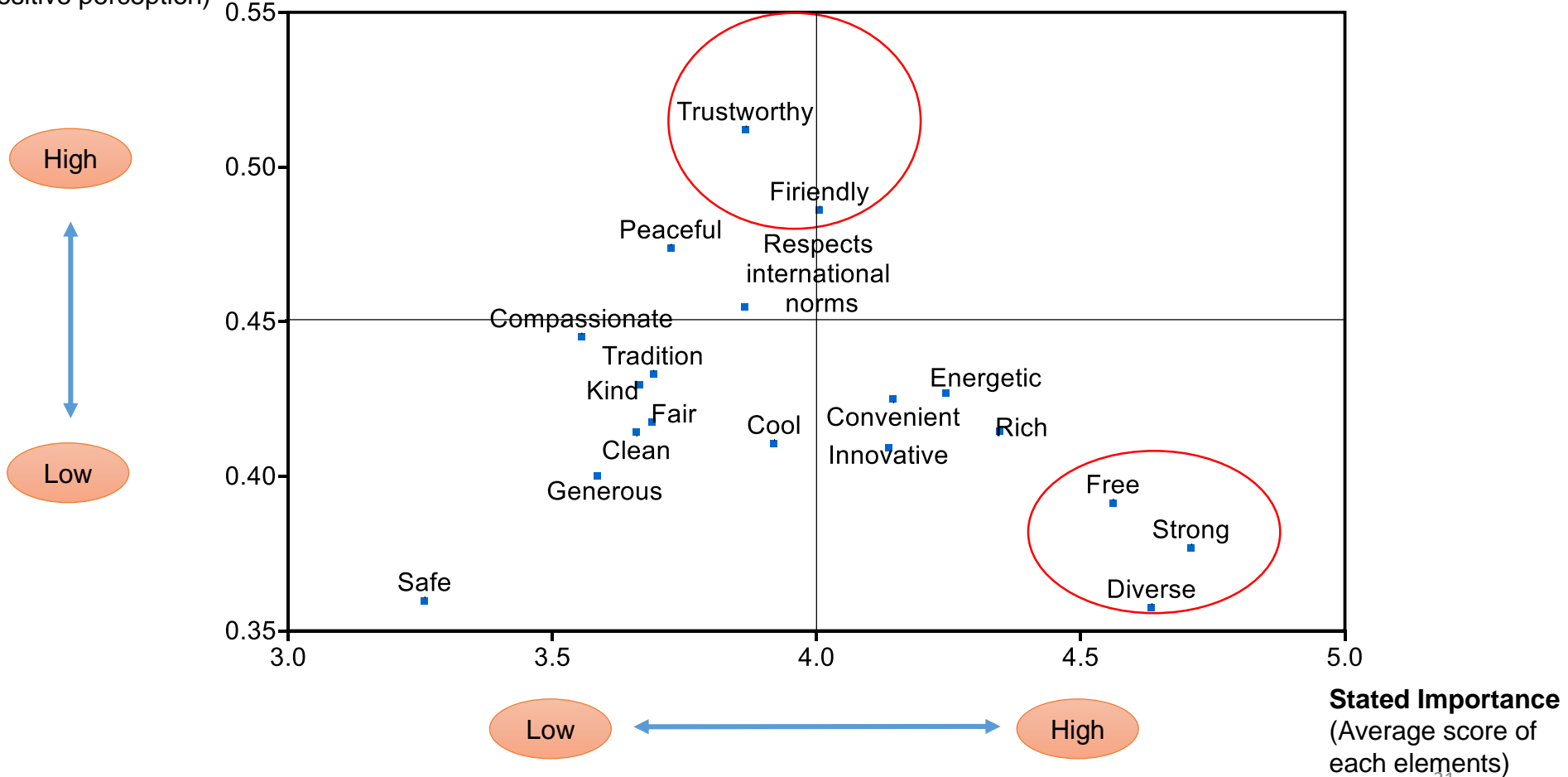


Elements that Drive Perception (US)

Elements such as “trustworthy” and “Friendly” drives positive perception while elements such as “free”, “strong” and “diverse” are less important

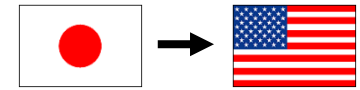
Perception towards the US

Derived Importance
(Correlation with positive perception)



Contents

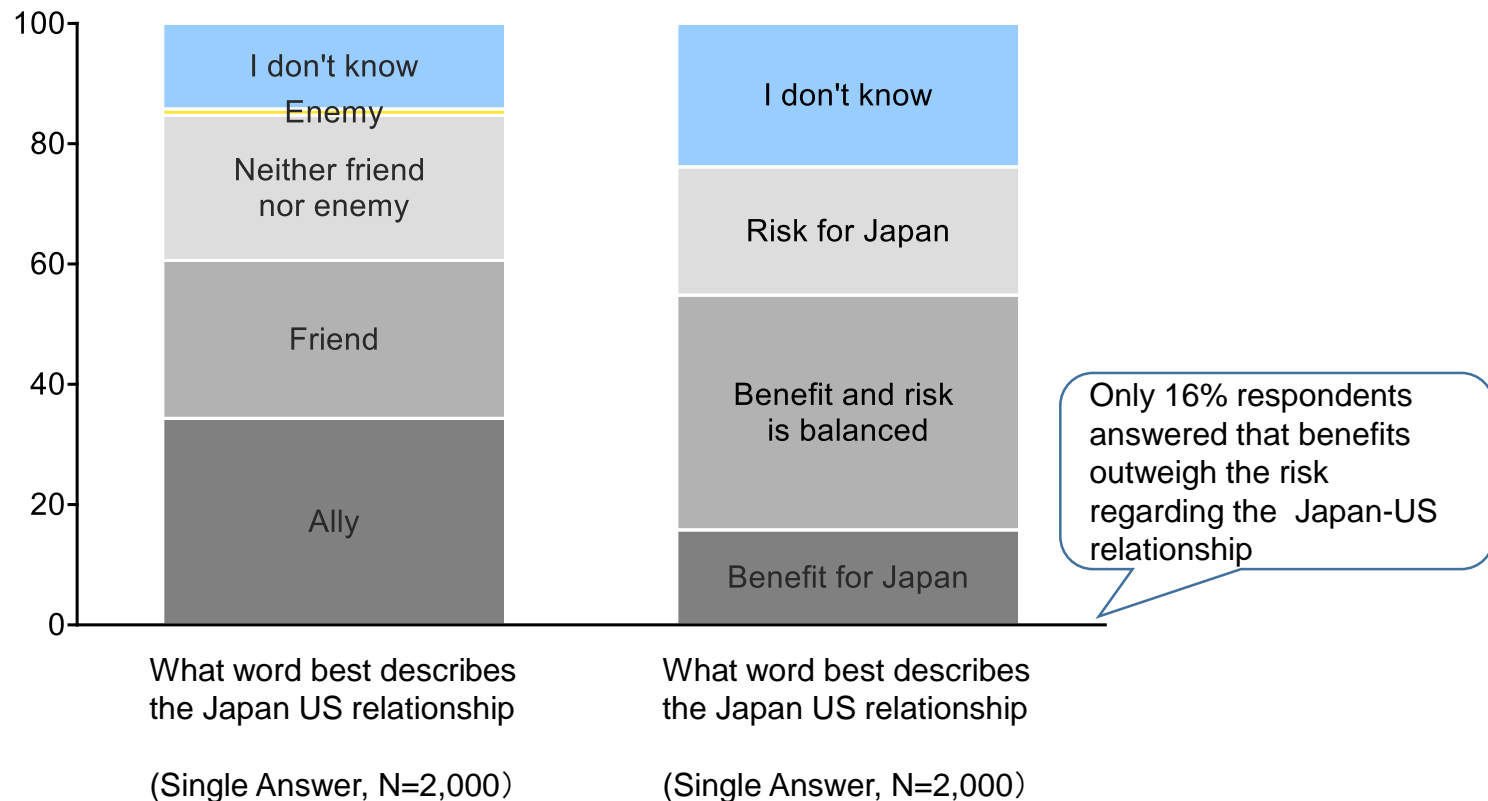
- Theoretical Background
- Japan's Public Opinion
- China's Public Opinion
- Korea's Public Opinion
- **Public Opinion towards the Japan-US & Korea-US Alliance**



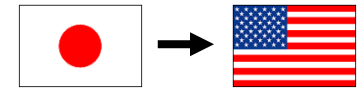
Perception towards the Japan-US Alliance

While 60% of the Japanese public view the US as an “ally” or a “friend”, less than 20% believe that the benefits from the Japan-US alliance outweigh its risk

Perception towards the Japan-US Alliance* (%)



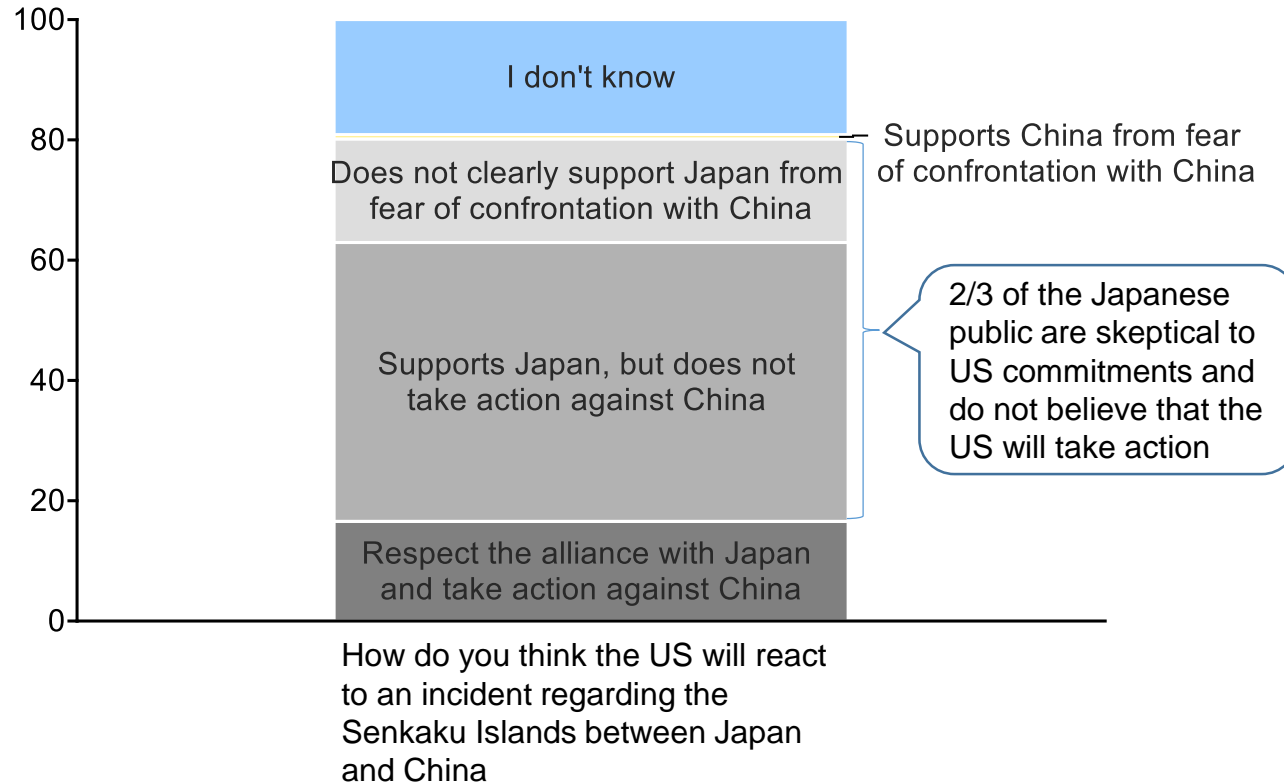
* Weighted back based on 2010 census regarding age, education, and geographical location



Senkaku Related Incident

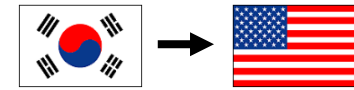
The Japanese public is skeptical of US action in case of a Senkaku related incident

Perception In Case of a Regarding Senkaku Related Incident* (%)



(Single Answer, N=2,000)

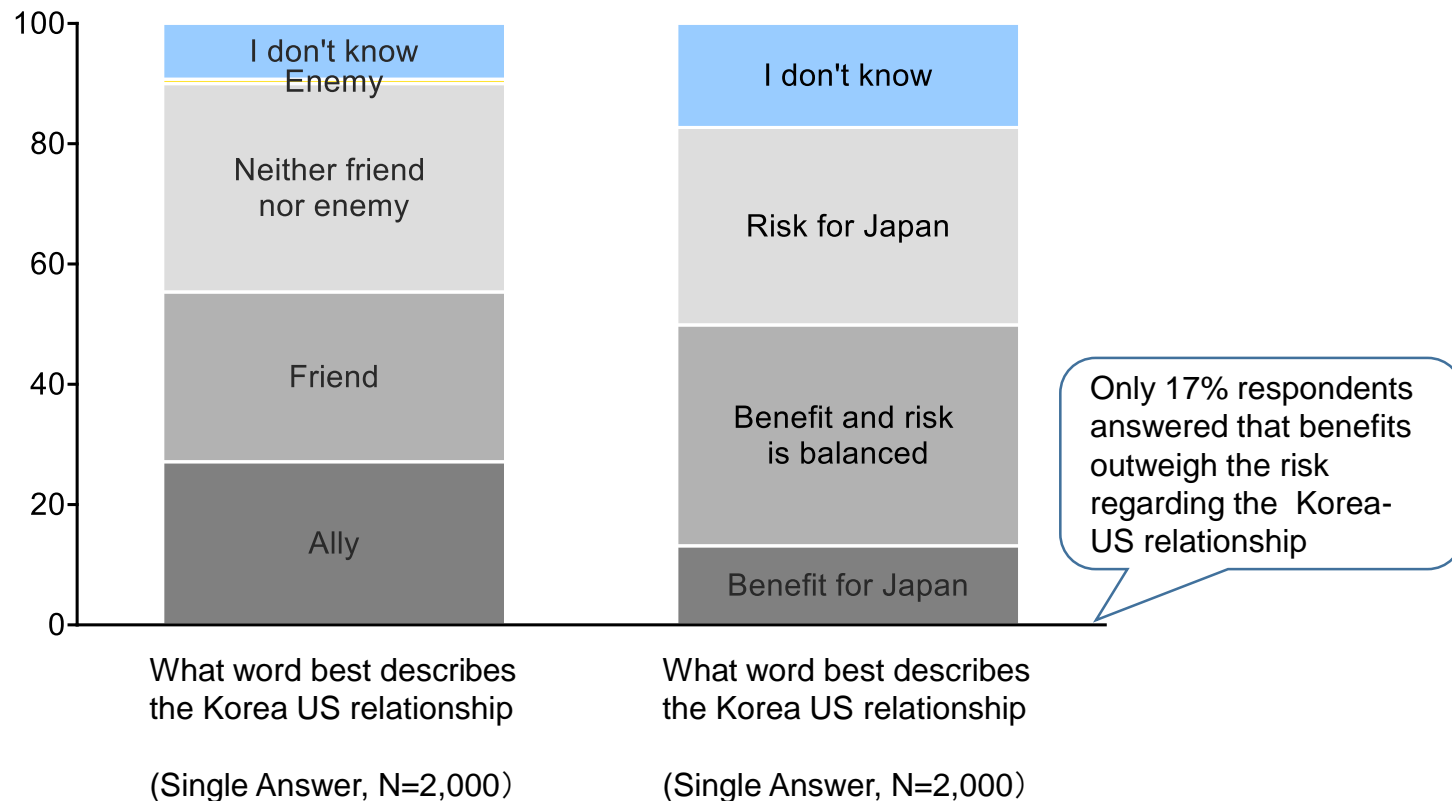
* Weighted back based on 2010 census regarding age, education, and geographical location



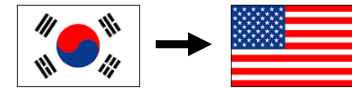
Perception towards the Korea-US Alliance

While majority of the Korean public view the US as an “ally” or a “friend”, less than 20% believe that the benefits from the Korea-US alliance outweigh its risk

Perception towards the Korea-US Alliance* (%)



* Weighted back based on 2010 census regarding age, education, and geographical location



North Korea Related Incident

However, close to half of the Korean public expect the US will take action against North Korea per commitments made in the Korea-US Alliance

Perception In Case of a North Korea Related Incident* (%)



(Single Answer, N=2,000)

* Weighted back based on 2010 census regarding age, education, and geographical location



Summary of Findings

| | | |
|--|---------------------|--|
| <p>Common trends</p> | | <ul style="list-style-type: none"> • Higher educated segments are more positive towards other countries along with attitudinal segments that expect believe in own income growth • Overseas exposure a strong driver of positive perception where personal aspects such as language capability and the existence of close friends/acquaintances are important • Economic interdependence also a strong driver of positive perception. Current relations as well as future expectations of economic relations is key |
| <p>Individual trends</p> | <p>Japan</p> | <ul style="list-style-type: none"> • Perception towards Korea and especially China negative in line with other surveys • Elements such as “strong” and “energetic” have high stated importance/low derived importance profile suggesting that the Japanese public is threatened by China • International developments against China most likely to lead to personal action where 35% of the population took some kind of action, and 24% boycotted Chinese goods |
| | <p>China</p> | <ul style="list-style-type: none"> • Anti-Japanese sentiments stand out both in width and depth while perception towards the US are very positive • The 50+ age segments above are more positive towards Japan • More people take action in relation to international relations, especially against Japan • However, perception towards Japan improves significantly with overseas exposure |
| | <p>Korea</p> | <ul style="list-style-type: none"> • Anti-Japanese sentiments stand out both in width and depth in line with other surveys • Younger segments more positive towards Japan which resemble Japan’s perception towards Korea |
| <p>The Japan-US & Korea-US Alliance</p> | | <ul style="list-style-type: none"> • Majority of the public in Japan and Korea view the US either as an “ally” or a “friend”, but less than 20% believe that the benefits of the US relationship outweigh the risk • An 2/3 majority of the Japanese public don’t believe the US will take action in case of a Senkaku related incident between Japan and China, while close to half of Koreans believe in the US’s commitment in a North Korea related incident |