

2021 Fall Survey

Executive Summary

K I N U
**Unification
Survey**
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**US-China Conflict &
South Korean Public Opinion**



**Corresponding
Author**

Dr. Sangsin Lee
(KINU)

Co-authors

Dr. Tae-eun MIN (KINU)

Prof. Kwang-il YOON
(Sookmyung Women's Univ.)

Prof. Bon-sang KOO
(Chungbuk National Univ.)

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Executive Summary



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I

Introduction

I. Introduction

1. Research Objectives and the Survey

■ Through face-to-face survey, the KINU Unification Survey seeks to:

- (1) explore changes in the South Korean public perceptions on Unification, policy towards North Korea, North Korean defectors, inter-Korean integration, and security;
- (2) identify various factors that determine and influence such perception; and
- (3) establish unification and North Korea policies that win public support and consensus based on the above research findings.

■ KINU Unification Survey

- KINU Unification Survey has accumulated data since 2014. Since 2019, the survey has been conducted two times a year, in the spring and fall.
- The the spring survey is conducted on the subject of unification, North Korea, and the relations between South Korea and North Korea, while the fall survey is conducted on the recognition of neighboring countries and national security.
- The data presented in this report was surveyed in October and November 2021 unless otherwise indicated.

<Table I - 1> KINU Unification Survey Period (2014~2021)

Survey No.	Survey Year	Survey Period
1	2014	Sep. 22 ~ Oct. 6
2	2015	Jul. 27 ~ Aug. 14
3	2016	Jun. 2 ~ Jun. 24
4	2017	Mar. 21 ~ Apr. 14
5	2018	Apr. 5 ~ Apr. 25
6	2019, 1 st	Apr. 5 ~ Apr. 25
7	2019, 2 nd	Sep. 7 ~ Oct. 8
8	2020, 1 st	May 20 ~ Jun. 10
9	2020, 2 nd	Nov. 10 ~ Dec. 3
10	2021, 1 st	Apr. 26 ~ May 18
11	2021, 2 nd	Oct. 21 ~ Nov.22

2. Cohort Analysis

■ Cohort of KINU Unification Survey

- KINU Unification Survey uses the cohort classification based on the birth year of respondents. The cohort classification is based on previous research.

<Table I - 2> Cohort Classification of Korean Society in the KINU Unification Survey

Cohort	Birth Year	Frequency (2021 Oct.)	Percentage(%)
War Generation	Born before 1950	92	9.2
Industrialization Generation	1951-1960	176	17.5
386 Generation	1961-1970	199	19.8
X Generation	1971-1980	180	17.9
IMF Generation	1981-1990	172	17.1
Millennials	Born after 1991	187	18.6
Total		1,006	100.0

3. Overview of the Survey

<Table I - 3> Overview of Survey

Classification	Contents
Group	South Korean Adults over the age of 18
Sampling Frame	South Korean Resident Registration Data (the Ministry of the Interior and Safety, September 2021)
Method	Stratified Random Sampling (by gender, region, and age)
Sampling Units	1,006
Sampling Errors	Assuming random sampling, sampling error is $\pm 3.1\%$ at the 95% confidence level.
Survey Method	Face-to-Face Personal Interview with structured questionnaire
Survey Period	October 21 st - November 22 nd
Survey Institute	Hankook Research

4. Summary of Survey Results

■ Public Opinion on Current Issues and Inter-Korean Relations

- The public's expectations and support for the End-of-war Declaration were confirmed. Oppositional party supporters also support End-of-war declaration despite the possibility of impact on the presidential election.
 - 70% of the People Power Party(PPP hereafter) supporters approve the Olympic End-of-war Declaration. 68.6% of the PPP supporters also approve the End-of-war Declaration
- Most South Koreans think that Inter-Korean relations will remain the same. 72.6% of the respondents expected that Inter-Korean relations will be the same over the next five years. This is the highest level since this survey was conducted.
- 70.2% of all respondents agreed with the succession of Agreement Between two Koreas. 70.3% of the PPP supporters also agreed.
- The opinions in favor of Korea's independent nuclear possession have steadily increased. In October 2021 Survey, it recorded 71.3%.
 - Opinions in favor of the US nuclear redeployment fell in 2019 due to calls for an increase in defense costs, but have increased again since. Currently, it is 61.8%.
 - Many agreed on issues such as possession of nuclear weapons and the need to develop nuclear-powered submarines after Unification.
- A tendency to prefer security through alliances over nuclear possession was also found. Given a choice between a ROK-US alliance and ROK nuclear weapons, 50% of the respondents chose the ROK-US alliance

■ ROK-US Relations and Perception of the US

- Since President Biden took office, the negative assessment of ROK-US relations has been decreasing as the US has returned to normal diplomacy and resolved the issue of defense cost sharing with South Korea.
- The necessity of the ROK-US alliance was confirmed again. 93% of respondents said the ROK-US Alliance was 'necessary'. The Korean people's support for the ROK-US Alliance is very firm and stable.
- About 90% of respondents responded positively to the current need for the US Forces to be stationed in Korea. About 61% of the respondents said that the presence of US Forces is necessary even after Unification, which is relatively low. However, the percentage of people who sympathize with the need for US Forces presence after Unification increased by about 10%P from the April survey.

- 66.9% of respondents believe that strengthening the ROK-US Alliance is more important than improving inter-Korean relations. It shows that Koreans highly appreciate the economic, political, and military stability provided by the ROK-US Alliance.
- Expectations for the resumption of the US-North Korea summit have increased. In this survey, 74.9% of respondents responded positively to the US-North Korea summit, up about 5%P from the last survey.
- Regarding the US economic sanctions against North Korea, the percentage of respondents who said that the current level should be maintained was the highest.
 - One hypothesis for this is that people are now more likely to think that the current level of US sanctions against North Korea has some effect on managing the situation on the Korean Peninsula.

■ Perception of Neighboring Countries and Assessment of US-China Relations

- Among the neighboring countries, preference for the US, an ally, remains overwhelmingly high. 66.2% of respondents have positive view on the US. On the other hand, preference for China (12.5%) and Russia (12.2%) was low.
- China is considered the country that does not want unification the most. 59.6% of respondents, well over half for the first time since the start of the 2018 survey, perceived China as a country that does not want the unification.
- Among the four neighboring countries, the overwhelming majority chose China as the country that poses the most threat to Korea's security (71.8%).
 - China's coercive and disrespectful attitude toward neighboring countries, such as all-or-nothing diplomacy, and oppression of Hong Kong's democratization movement and pressure on Taiwan are making China feel threatening.
- The Korean people prefer balanced diplomacy between the US and China the most. However, the preference for strengthening the alliance with the US over balanced diplomacy is increasing, and the survey in October 2021 reached 31.1%.
- The Korean people perceive that the US is more important than China in terms of Korea's security and economy.
- Disappointment with US global leadership is increasing.
 - More than 50% of the respondents said the importance of US as a world leader is decreasing compared to the past decade.
- There is a decreasing trend of opinions that Korea should participate in maintaining the world order of US. The disagreement of young Cohort was relatively high.
 - These results suggest that the younger generation in Korea will no longer take the US-led world order for granted or as what the world should be.

■ ROK-China Relations and Perception of China

- Preference for China since 2018 has been on the decline, and in particular, the gap with the preference for US is widening.
- Only a small number of Koreans believe that China complies with democratic values. This suggests that the more democratic values are emphasized in Korea, the more negative perceptions of China may intensify.
- In terms of economy, positive perception of China (cooperation and the Chinese market) is found, but there is a mixture of vigilance and threat perception toward China. In particular, it should be noted that one of the main causes of weakening the foundation for positive perception of China may be the controversy over fine dust from China.
- History and Culture: Many respondents saw that China did not respect the history of neighboring countries, but opinions on exerting influence on Korean cultural content through Chinese capital were tightly divided. This may reflect confidence in our culture and Korean soft power.
- Regarding the unification of the two Koreas, Koreans perceive China very negatively. The majority of Koreans do not believe that peaceful unification will be possible through improved relationship with China.
- When analyzing attitudes toward China-related issues, there is no difference in age or generation contrary to general expectations, that is, it is difficult to say that young people are more negative or middle-aged people are more positive in China. Rather, it was identified that the assessment of individual tendencies such as ideology or evaluation of Korean soft power, has a clearer relationship with perceptions and attitudes toward China.
- Responsibility for the spread of COVID-19: Contrary to the common idea, the percentage of respondents who answered that China is responsible for the spread of COVID-19 was rather the highest among liberals.
- The opinion that China's economic retaliation should be strongly dealt with is the highest among the liberals. In addition, the percentage of liberals who believe that they have sufficient capacity to withstand China's economic retaliation was the highest. It was identified again that the simple schematic of liberals being pro-China and conservatives being anti-China does not match.
- The percentage of liberals who agreed to actively cope with China's historical distortion was the highest.
- Many expressed opposition or reservations to ROK's intervention in the Hong Kong democratization movement.
- China's Unification with Taiwan: Respondents do not see the Hong Kong democratization movement and the Taiwanese armed unification in the same context. Unlike Hong Kong, it seems that Taiwan is perceived as a separate country from China. A majority of respondents showed an attitude that they should join efforts to stop China's attempt to annex Taiwan by force.

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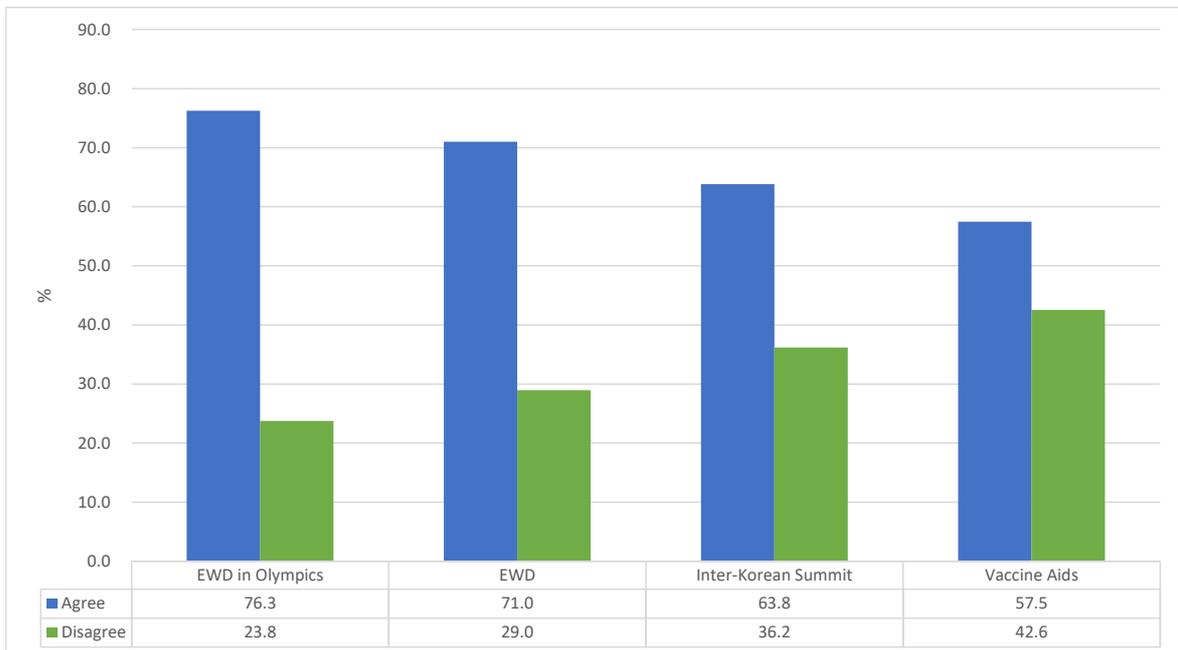
II

Public Opinion on Current Issues and Inter-Korean Relations

II. Public Opinion on Current Issues and Inter-Korean Relations

1. End-of-war Declaration and Inter-Korean Exchanges

<Figure II - 1> End-of-War Declaration and Inter-Korean Relations



■ Survey Questions

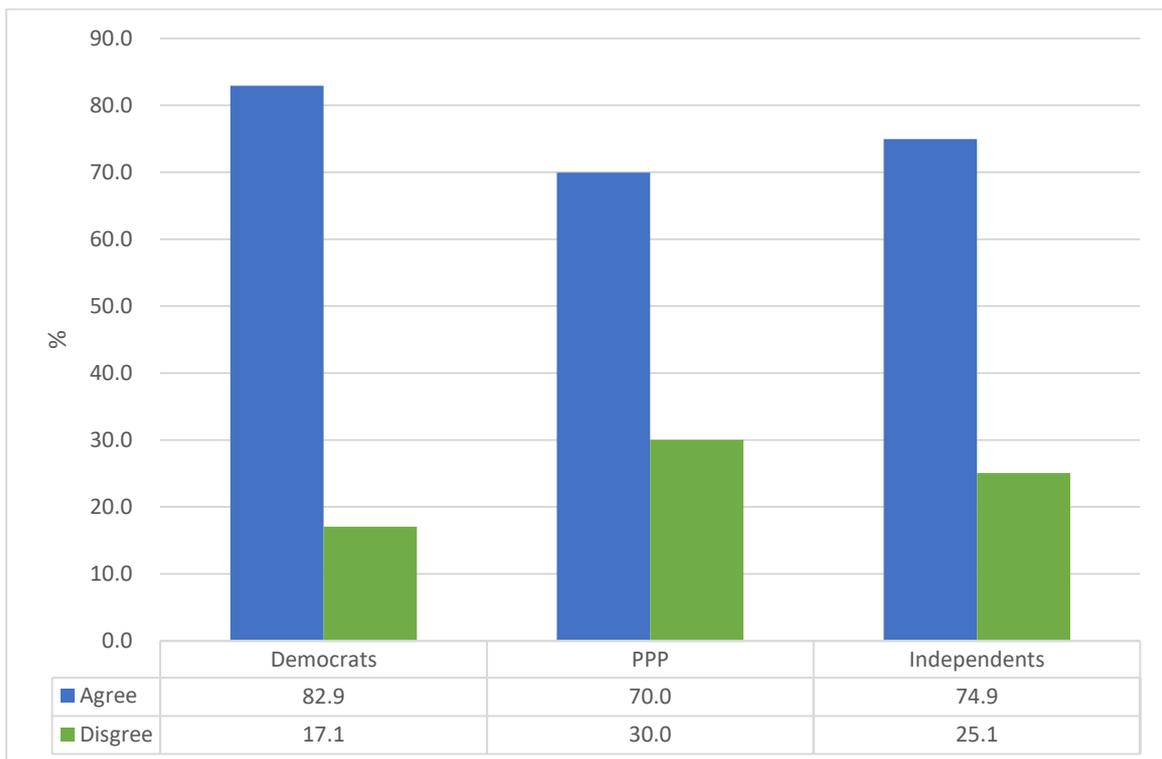
- End-of-War Declaration (EWD) in Olympics - "In February 2022, the Winter Olympics will be held in Beijing, China. What do you think about the declaration of an end to the Korean War by the leaders of the four countries, South Korea, North Korea, the United States, and China, meeting at this Olympic Games?"
- End-of-War Declaration(EWD) - "The Korean government must persuade the U.S. government to officially end the Korean War, which remains in a state of armistice, through a declaration of an end to the Korean War."
- Inter-Korean Summit - "What do you think about President Moon Jae-in meeting with Chairman Kim Jong-un again and holding a summit to improve inter-Korean relations?"
- COVID-19 Vaccine Aids - "What do you think about South Korea providing COVID-19 vaccines to North Korea?"

- 1=Strongly agree; 2=Somewhat agree; 3=Somewhat disagree; 4=Strongly disagree
- Positive responses (Agree, Strongly agree) for this question were coded into "Agree" and the negative responses (Strongly disagree, Disagree) into "Disagree", and are shown on the above graph

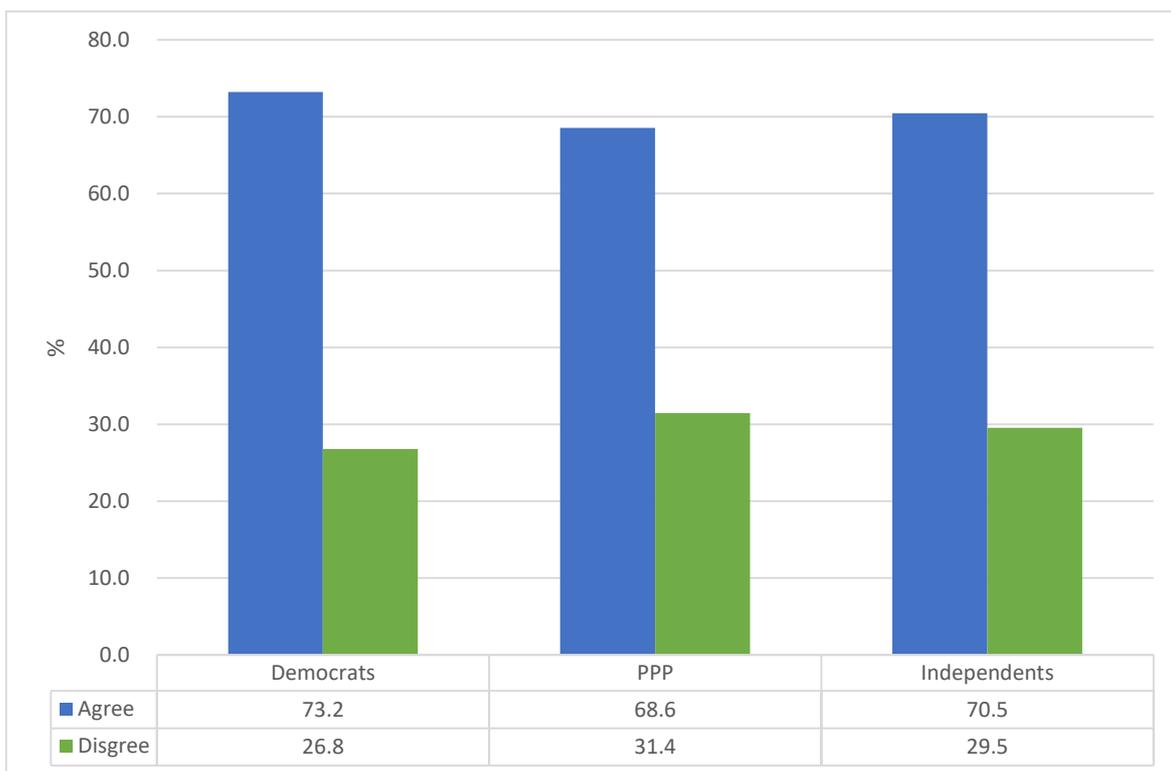
■ National Consensus on the End-of-war Declaration and Improvement of Inter-Korean Relations

- The public's expectations and support for the End-of-War Declaration have been identified. No significant difference was found when comparing the responses to the Olympic End-of-War Declaration and End-of War Declaration by supporting parties.
 - 70% of the PPP supporters agreed on the Olympic End-of-war declaration. 68.6% of the PPP supporters also agreed on the End-of-war Declaration.
- Considering that the PPP's presidential primary was completed at the time of the survey, opposition party supporters also support the End-of-war Declaration despite the possibility of influence of this issue on the presidential election

<Figure II - 2> EWD in Olympics by Party Id.



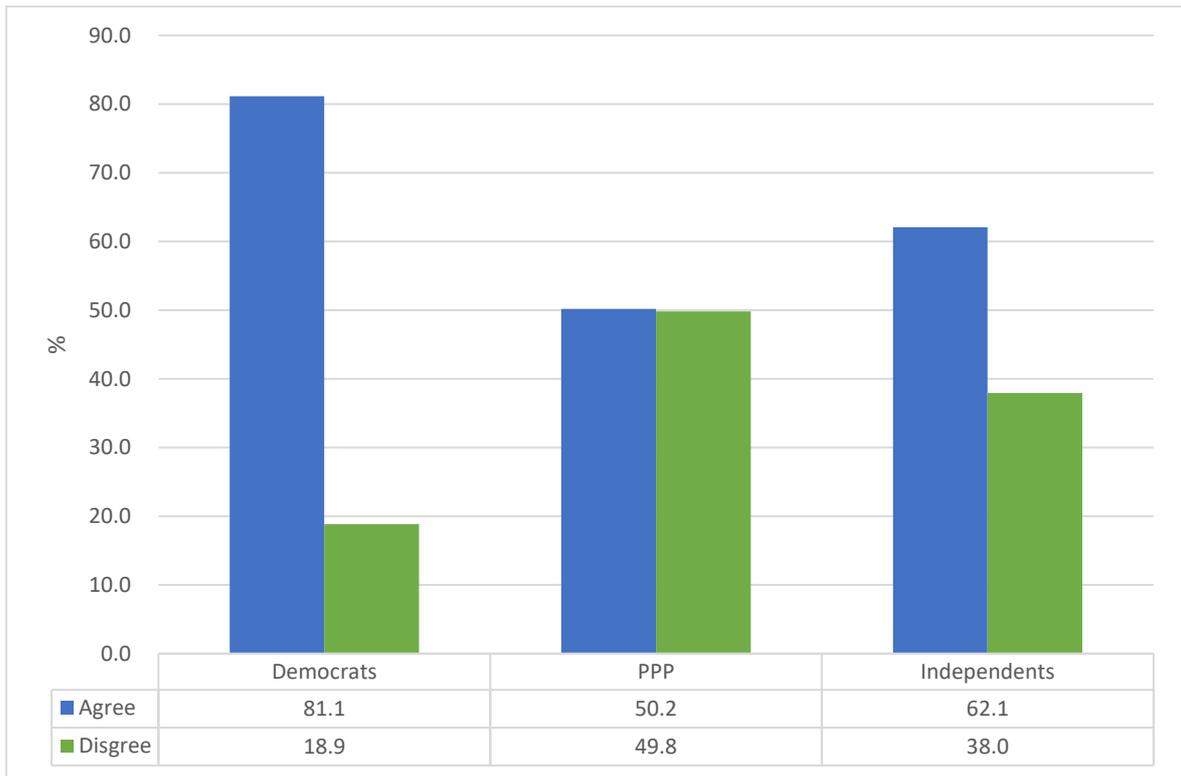
<Figure II - 3> EWD by Party Id.



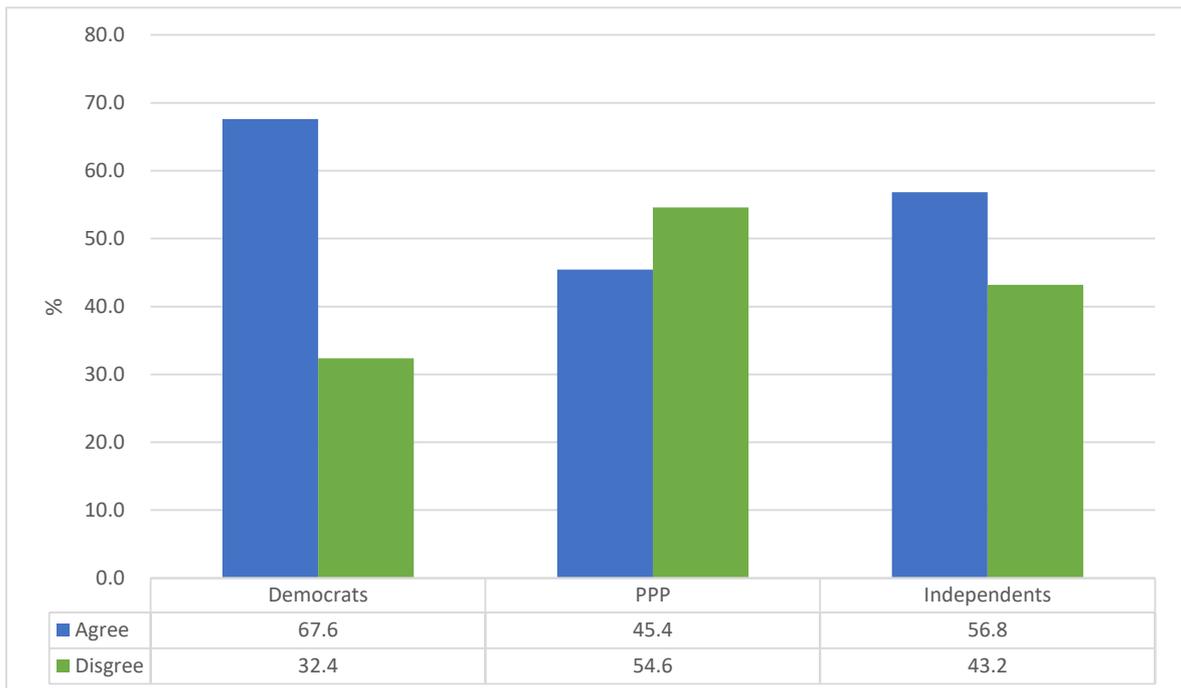
■ Conflicting Public Opinion on the Inter-Korean Summit and Support for COVID-19 Vaccine

- In contrast to the majority of the opposition party supporter's agreement of the End-of-war Declaration, opinions are divided on Inter-Korean Summit and support for COVID-19 vaccine.
 - 81.1% of Democratic Party supporters approve of the resumption of the Inter-Korean Summit, while 50.2% of opposition party supporters approve.
 - 54.6%, more than half of the opposition party supporters, oppose the COVID-19 support to North Korea.

<Figure II - 4> Inter-Korean Summit by Party Id.



<Figure II - 5> COVID-19 Vaccine Aids



2. Prospects on Inter-Korean Relations

<Figure II - 6> 5-Year Prospects of Inter-Korean Relations



■ Survey Questions

- “What do you think will happen in the next five years for the relationship of South and North Korea?”
 - 1=It will be much worse; 2=It will be somewhat worse; 3=It will be the same; 4=It will be somewhat better; 5=It will be much better
 - “Get Better” = 4+5 ; “Get Worse” = 1+2

■ Prospect for Maintaining the Status Quo of Inter-Korean Relations

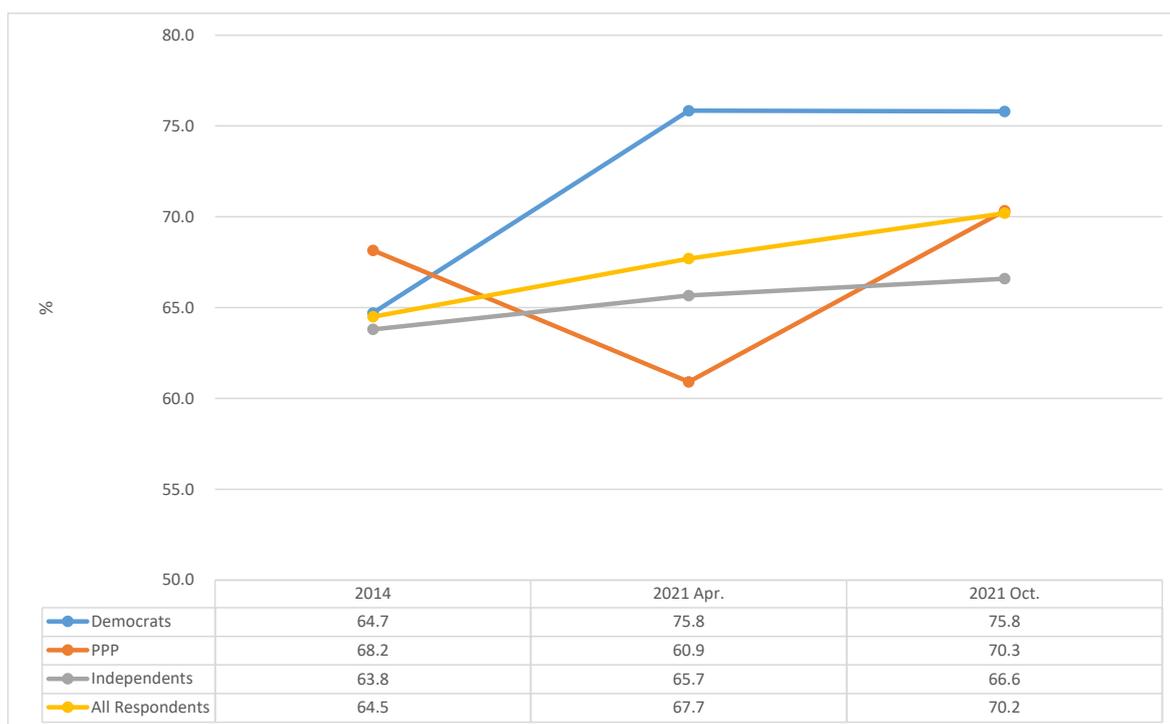
- In a survey conducted in October 2021, 72.6% of respondents expect Inter-Korean relations to remain in the status quo over the next 5 years. This is the highest level since this survey.
- Prospects for “will get better” or “will get worse” were 16.2% and 11.2%, respectively. The prospect that it will get better compared to the survey in April has increased

slightly, but it cannot be seen as a significant increase.

- After President Moon Jae In's September speech to the UN, there were some changes in North Korea's attitude, such as restoring the communication lines. But people who remembered the sudden crunch in the Inter-Korean relations since 2019 tend to be skeptical about restoring the relations.

3. Succession of Agreement Between Two Koreas

<Figure II - 7> Succession of Agreement Between Two Koreas



■ Survey Questions

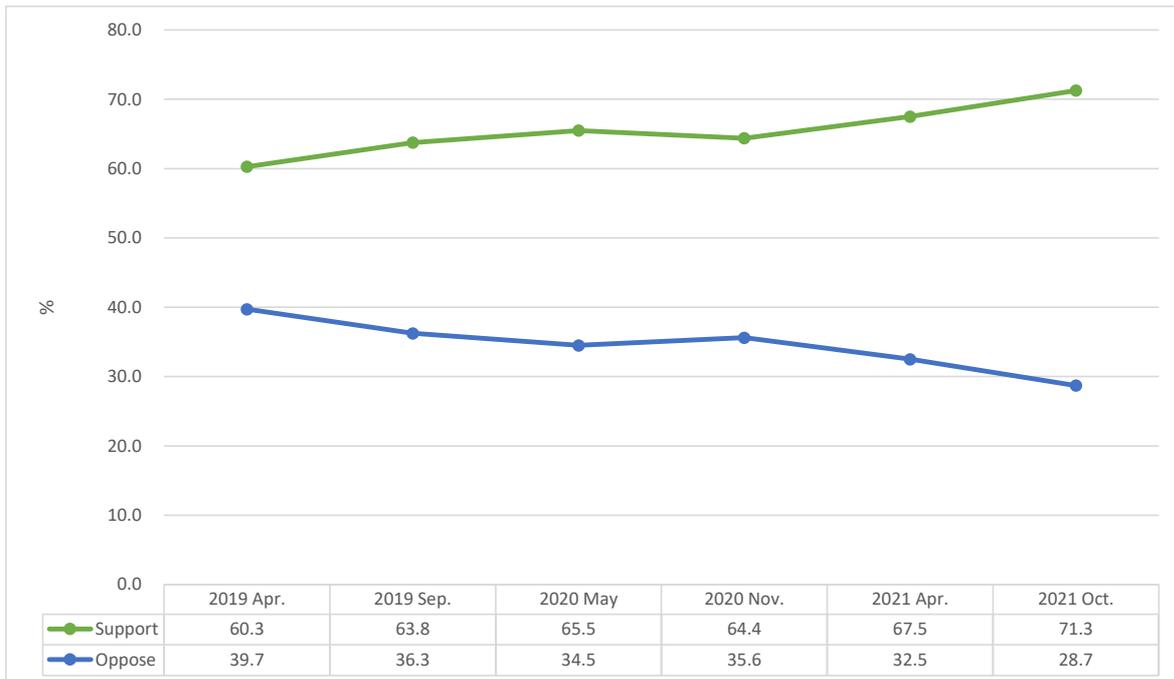
- “The agreements between the two Koreas should be continued regardless of the government's change.”
 - 1= support strongly; 2= support somewhat; 3= oppose somewhat; 4= oppose strongly
 - Only positive responses (1+2) are shown on the graph.

■ Broad Consensus on Succession of Agreement Between Two Koreas after the Presidential Election

- 70.2% of all respondents in the survey from October of 2021 agreed to the succession of agreement between two Koreas, regardless of the governmental change. 70.3% of opposition party supporters also agreed.
- Compared to last April's survey, the consent of the PPP supporters for the succession rose from 60.9% to 70.3%. This seems to reflect the opinions of the more center-right voters joining the opposition party as they are mobilized.

4. South Korea's Nuclear Development and the Redeployment of US Nuclear Weapons

<Figure II - 8> South Korea's Development of Nuclear Weapons



■ Survey Questions

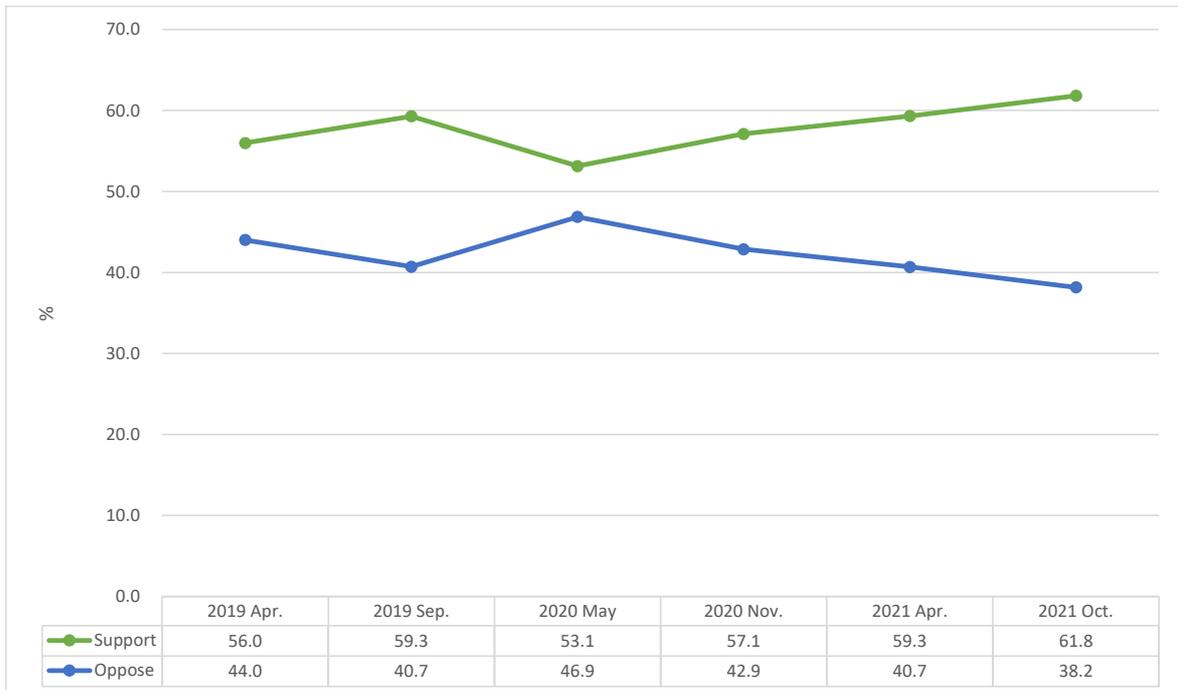
- “There is an argument that if North Korea does not give up on nuke, South Korea should also possess nuclear weapons. What is your thought on this?”
 - 1=oppose strongly; 2=oppose somewhat; 3=support somewhat; 4=support strongly

■ Steady Increase of Positive Opinions on Korea's Independent Nuclear Possession

- Since the April 2019 survey, which first investigated this item, opinions in favor of possessing nuclear weapons have been steadily increasing. In the October 2021 survey, it was 71.3%.
- Asan Research Institute, investigating the same items, identified that 69.3% of the respondents in 2020 agreed to independent nuclear development.¹⁾
- It seems to be reaction to South Korea's geopolitical characteristics and natural response towards North Korea's nuclear threat.

1) 제임스 김·강충구·함건희. 2021. "한국인의 외교안보 인식: 2010~2020년 아산연례조사 결과." 아산연구원. p. 37.

<Figure II - 9> Opinion on US Nuclear Relocation



■ Survey Questions

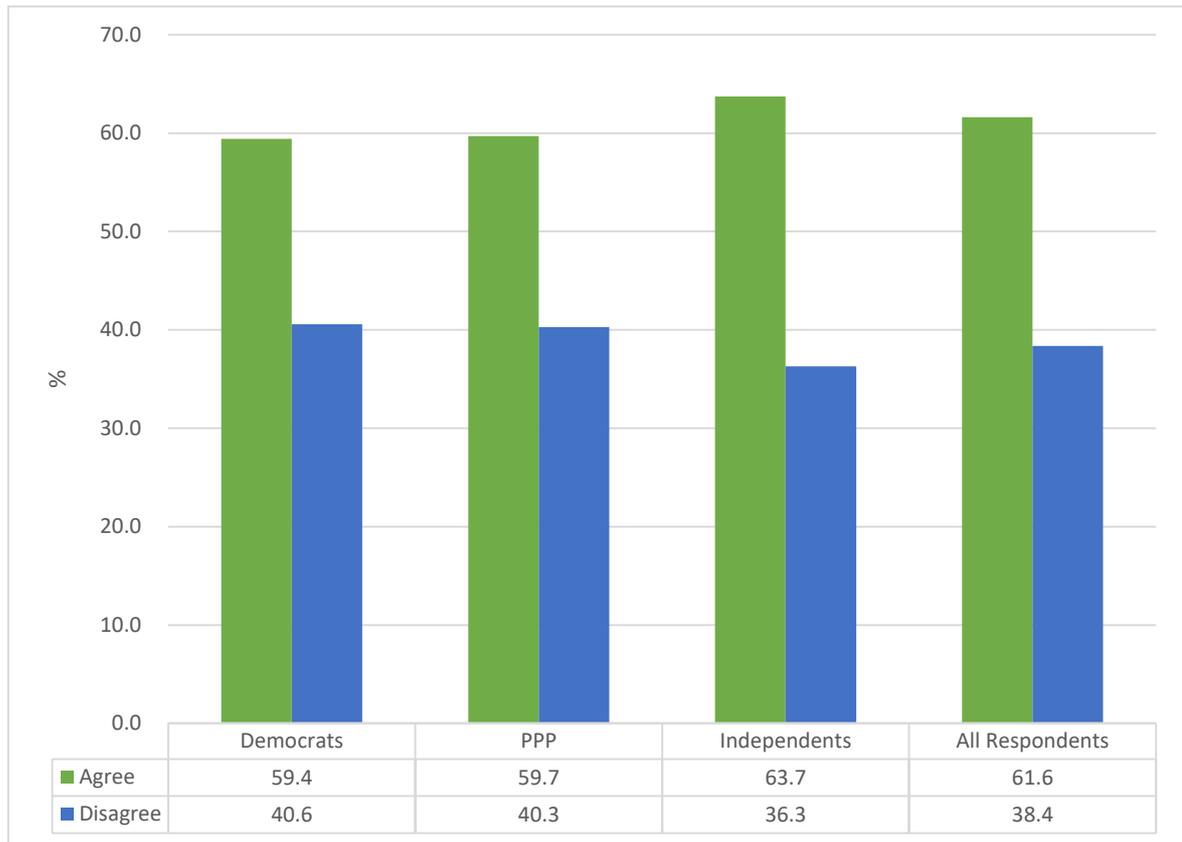
- “There is an argument that if North Korea does not give up on nuke, the U.S. nuclear weapons should be deployed to South Korea. What is your thought on this?”
 - 1=oppose strongly; 2=oppose somewhat; 3=support somewhat;4=support strongly

■ Majority of the Respondents are Positive about the US Nuclear Redeployment

- In the 2020 Asan Research Institute survey, 61.3% of the respondents agreed to redeployment of US nuclear weapons ²⁾.
 - It is also similar that Korea's approval for independent nuclear development is about 10%p higher than that of the U.S. nuclear redeployment.
- Since the September 2019 survey, opinions in favor of US nuclear redeployment.
 - This period is when there was a dispute over the defense cost sharing between South Korea and the United States. Complaints with the Trump administration in this regard seem to have also affected the attitude toward nuclear redeployment.

2) 제임스 김·강충구·함건희. 2021. "한국인의 외교안보 인식: 2010~2020년 아산연례조사 결과." 아산연구원. p. 37.

<Figure II - 10> Opinion on Possessing Nuclear Weapons after Unification



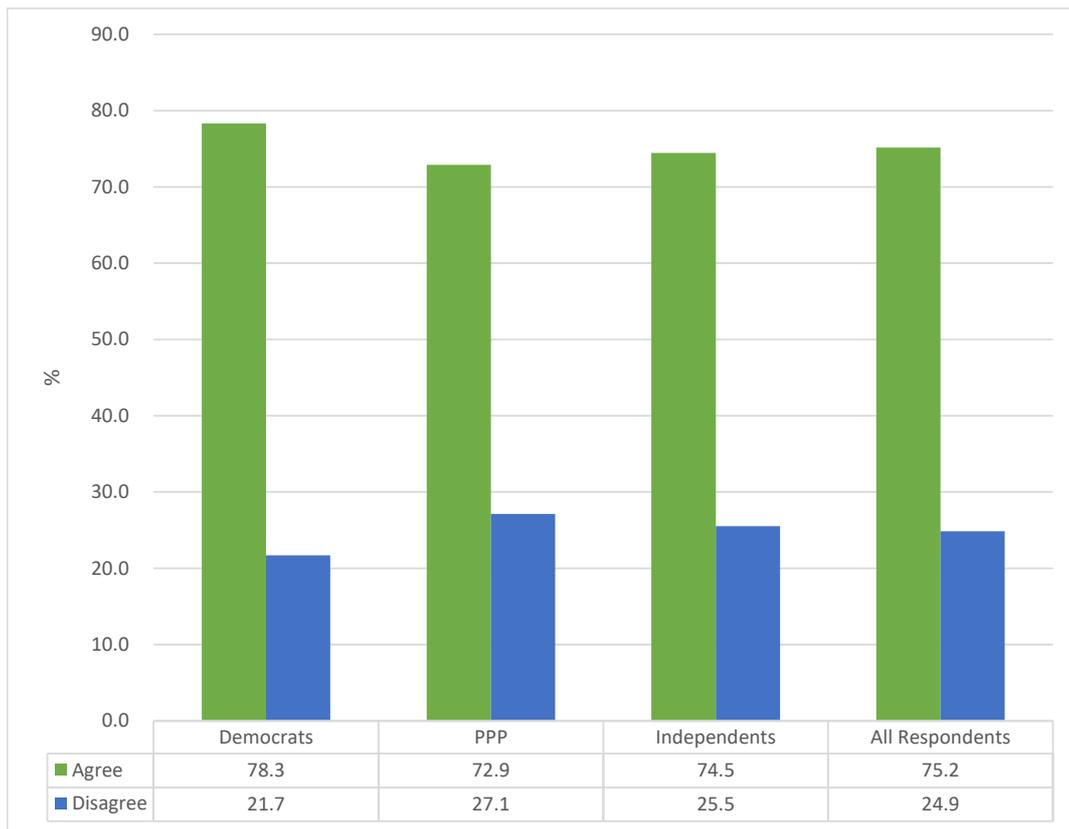
■ Survey Questions

- “What do you think about having nuclear weapons after North and South Korea are reunified?”
- 1=oppose strongly; 2=oppose somewhat; 3=support somewhat; 4=support strongly

■ Expectations for Possessing Nuclear Weapons after Unification

- 61.6% of all respondents agreed to possess nuclear weapons after unification. No disagreement among political parties was found on this issue.
- South Koreans seem to think that it is necessary to possess nuclear weapons as a means of securing sovereignty and survival rights from neighboring powers, beyond securing safety from North Korea’s nuclear weapons.

<Figure II - 11> Opinion on the Development of Nuclear-Powered Submarines



■ Survey Questions

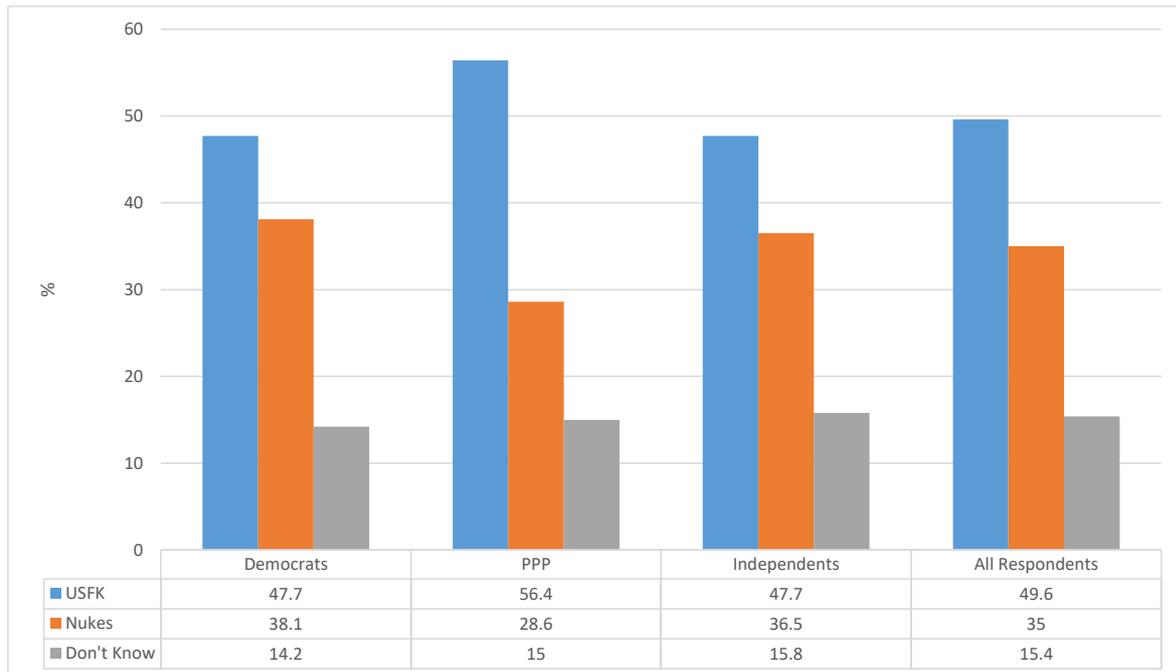
- Recently, the United States decided to transfer nuclear-powered submarine technology to Australia and support its development. What do you think about South Korea developing a nuclear-powered submarine?
 - 1=oppose strongly; 2=oppose somewhat; 3=support somewhat; 4=support strongly

■ More than 75% of respondents agreed in the development of nuclear-powered submarines

- The approval rate of the Democratic Party was 78.3%, which was higher than the PPP, which was 72.9%. There was actually a consensus that exceeded the supporting party regarding security issues.
- The explanation within the question that the US is transferring nuclear-powered submarine technology to Australia may have affected the high approval rate. However, considering the high support for the possession of nuclear weapons, the impact is unlikely to be significant.

5. US Forces in Korea vs. Nuclear Weapons

<Figure II - 12> USFK vs. Nuclear Weapons: by Supporting Party



■ Survey Questions

- “If you had to choose between the presence of US forces in Korea and the possession of nuclear weapons for our national defense, which one would you choose?”
 - 1=US forces in Korea; 2=Nuclear weapons; 3=I don't know

■ Prefer Security through Alliances rather than Nuclear Weapons

- 49.6% of all respondents chose to the US Forces in Korea, but about 35% said they would rather have "nuclear weapons," indicating that more than a third of the people were positive about possessing nuclear weapons.
- These results contrast with the fact that the majority of respondents agreed with the need for South Korea’s independent nuclear development or redeployment of US nuclear weapons.
- It shows that the South Korean public is not ignorant of the costs and dangers involved with the nuclear development or redeployment of US nuclear weapons. South Koreans prefer security through alliance rather than nuclear weapons, if possible.
- In the comparison by supporting party, the probability of supporters of the Democratic Party and independent voters choosing to possess nuclear weapons was relatively high.

- Traditionally, it is believed that supporters of conservative parties have more positive attitude toward the presence of ROK-US alliance and US forces in Korea regarding Security.

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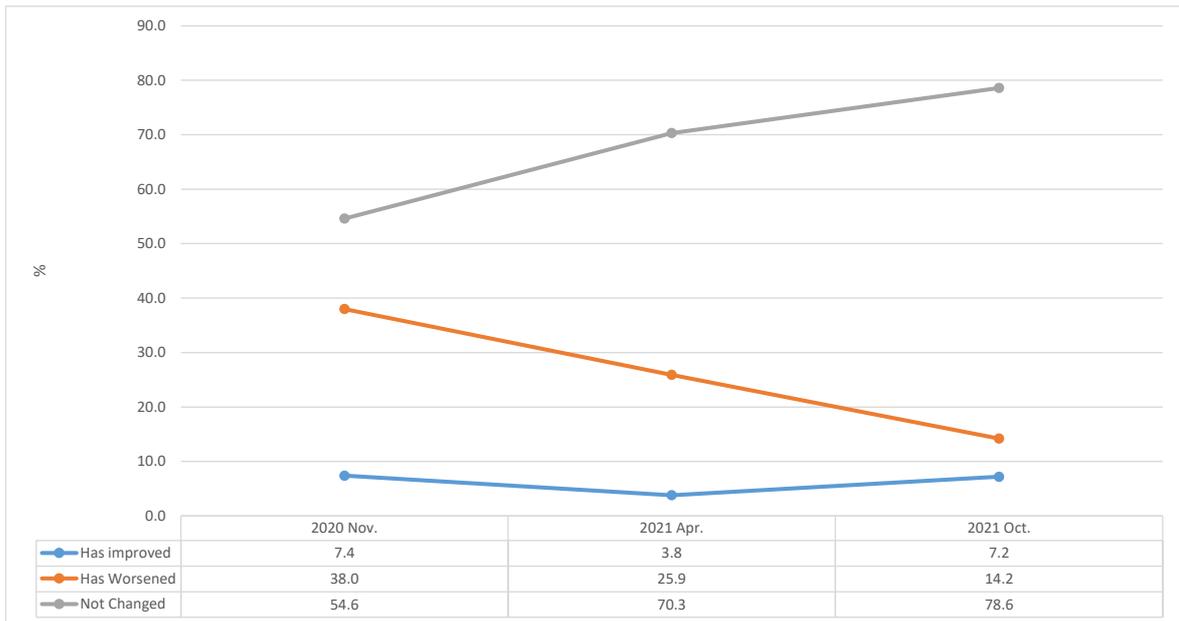
III

ROK-US Relations and Perception of US

III. ROK-US Relations and Perception of US

1. Assessment of ROK-US Relations

<Figure III - 1> Assessment of ROK-US Relations



■ Survey Questions

- “How do you evaluate ROK-US relations over the past year?”
 - 1 = Has improved; 2 = Has worsened; 3 = Has not changed much

■ Reduction of Negative Assessment of ROK-US Relations

- In the assessment of the overall ROK-US relations, which was investigated three times since November last year, the proportion of respondents who said it did not change much showed a gradual increase. In this survey, about 79% of the respondents said it did not change much.
- Since president Biden took office, the U.S. has returned to normal diplomacy and resolved the issue of defense cost sharing with South Korea, apparently reducing negative assessments of ROK-US relations.

2. Necessity of ROK-US Alliance

<Figure III - 2> Necessity of ROK-US Alliance



■ Survey Questions

- “Do you believe that U.S.-ROK Alliance will still be necessary in the future?”
 - 1=not necessary at all; 2=not particularly necessary; 3=somewhat necessary; 4=absolutely necessary
 - “Necessary” = 3+4 ; “Not Necessary” = 1+2, as shown on the graph.

■ National Consensus on Necessity of ROK-US Alliance

- In this survey, 93% of respondents, which is similar to the previous survey, said that ROK-US Alliance is needed. The Korean people’s support for ROK-US Alliance is very firm and stable.
- Although the PPP’s supporters agreed with the need for ROK-US Alliance at a high rate, there is no significant difference in perception among the party supporters <Table III -1>.

<Table III - 1> Necessity of ROK-US Alliance: By Supporting Party

	2019 Sep.	2020 Apr.	2020 Nov.	2021 Apr.	2021 Oct.
Democratic Party	93.5	88.9	93.6	90	93.9
PPP	92.3	92.3	95.2	96.4	96.4
Non-committed Party	92.7	91.1	93	95.2	91.1

3. Necessity of US Forces in Korea: Now and After Unification

<Figure III - 3> US Forces in Korea: Now vs. After Unification



■ Survey Questions

- Necessary Now: "Do you think that U.S. Armed Forces in Korea is needed now?"
- Necessary After Unification: "Do you think that U.S. Armed Forces in Korea will be needed even after Unification of Korea?"
 - 1=Not at all needed; 2=Not particularly needed; 3=Somewhat needed; 4=Very needed
 - Positive responses (3 and 4) to each questions are shown on the graphs.

■ Increase of Necessity for US Forces in Korea after Unification

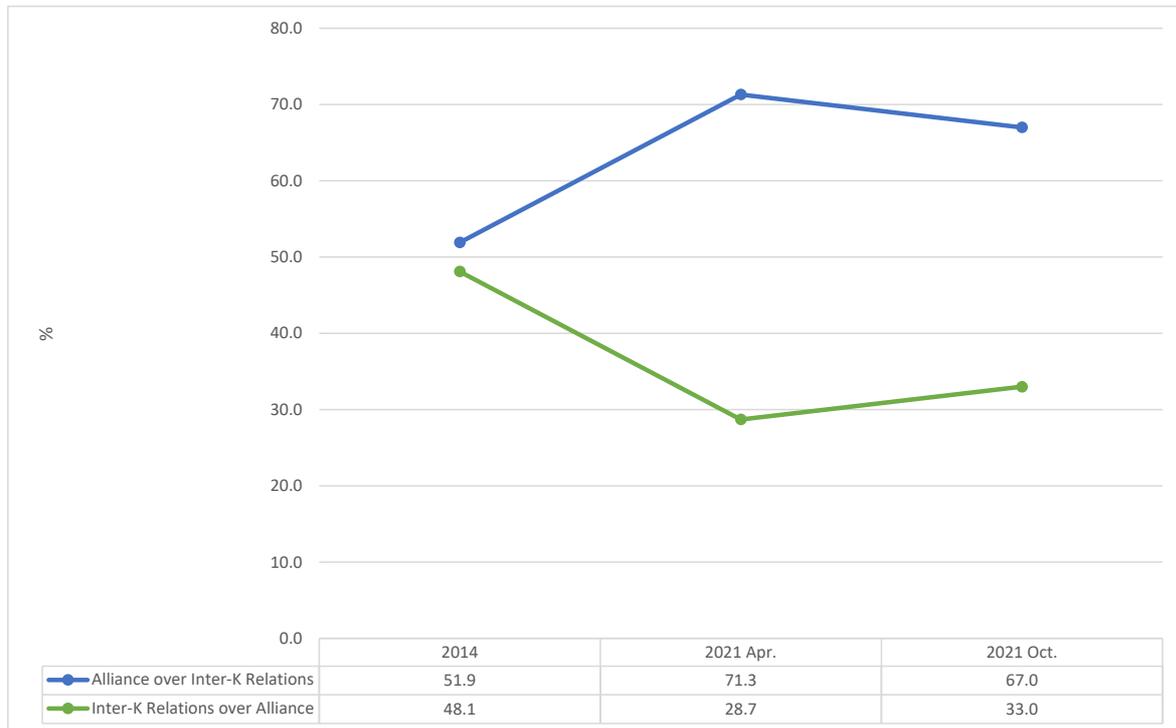
- In this survey, about 90% of respondents responded positively to the current need for US Forces in Korea to be stationed on the Korean Peninsula. After unification, the necessity of US Forces in Korea was relatively low at about 61%.
- The percentage of people who sympathize with the need to deploy US forces in Korea after unification increased by about 10%P from the April survey.
 - One cause can be that people have witnessed the confusion caused by the withdrawal of US forces from Afghanistan. Also, the recent intensifying US-China competition seems to be strengthening the perception that ROK-US Alliance and

its key element, the presence of US forces, are necessary even if North Korea's risk factors decrease.

- Thus, the perception of the necessity of US Forces in Korea from the perspective of regional security has increased. This suggests that the presence of the US Forces is viewed as an issue of pragmatism, rather than issues of nationalism or independent defense.

4. Improvement of ROK-US Alliance and Inter-Korean Relations

<Figure III - 4> ROK-US Alliance and Inter-Korean Relations



■ Survey Questions

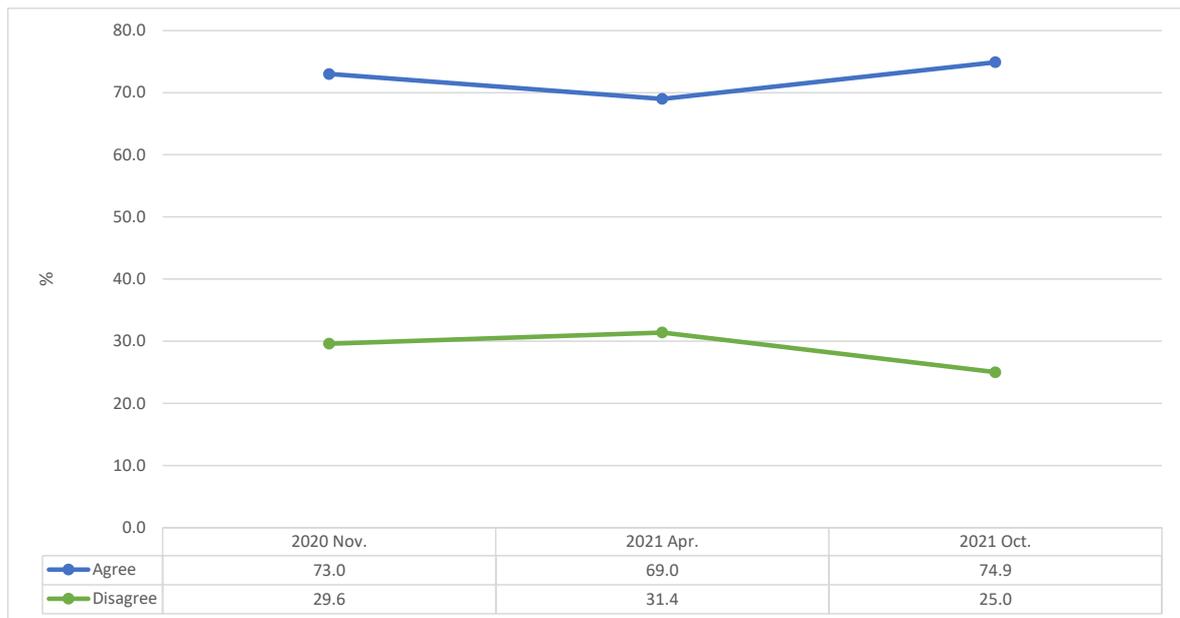
- “Strengthening the ROK-US alliance is more important than improving inter-Korean relations.”
 - 1= support strongly; 2= support somewhat; 3= oppose somewhat; 4= oppose strongly
 - “Alliance over Inter-K Relations” = 1+2; “Inter-K Relations over Alliance” = 3+4

■ Strengthening the ROK-US Alliance is More Important than Improving Inter-Korean Relations

- 66.9% of the respondents believe that strengthening the ROK-US Alliance is more important than improving Inter-Korean Relations.
- Increased by about 15%P compared to the survey conducted seven years ago (51.9%).
- It shows that Koreans highly appreciate the economic, political, and military stability provided by the ROK-US Alliance.
- Also, it may be related to the fact that the majority of the people are not expecting the inter-Korean relations to be improved much in the near future.

5. Resumption of North Korea-US Summit

<Figure III - 5> Resumption of North Korea-US Summit



■ Survey Questions

- “Do you think U.S. President Biden should hold a summit with North Korean leader Kim Jong-un”
 - 1 = U.S.-North Korea summit should resume without conditions; 2 = If North Korea makes some substantial progress on denuclearization, the summit should resume; 3 = The U.S. should not resume the summit until North Korea completely gives up its nuclear weapons; 4 = Under no circumstances should the North Korea-US summit resume.
 - “Agree” = 1+2; “Disagree” = 3+4

■ Increase of Expectation for Resumption of North Korea-US Summit

- In this survey, 74.9% of the positive responses (“Resume without conditions” and “Resume if North Korea makes progress in denuclearization”) to hold the North Korea-US Summit increased by about 5%P from the last survey.
- However, it is worth noting that 75% of positive respondents (about 56% of all respondents) agreed to hold the North Korea-US Summit under the condition that North Korea makes progress in denuclearization.
- By supporting party, the percentage of positive PPP supporters has increased

significantly compared to the previous survey (<Table III-2>).

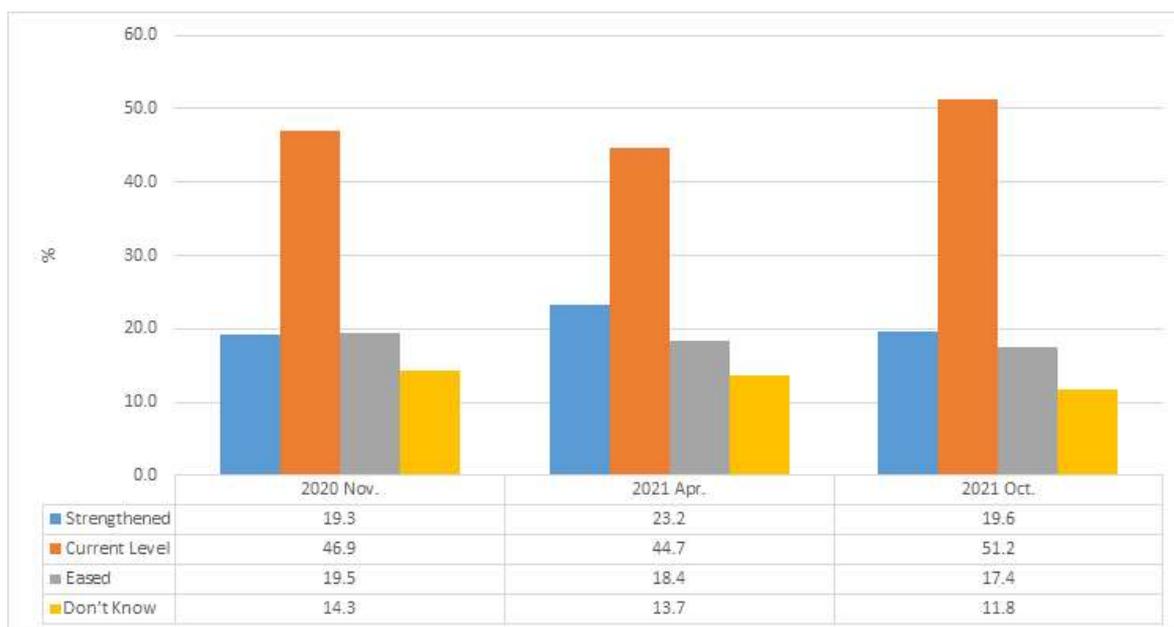
- Specifically, 72%, an increase of about 20%P, showed a positive attitude toward holding the North Korea-US Summit.
- This is a meaningful change considering that 95% of the PPP supporters in the survey said that North Korea would not give up in developing nuclear weapons.
- Therefore, even if there is no possibility that North Korea will give up its nuclear weapons, the number of supporters of the PPP who believe holding the North Korea-US Summit is meaningful if North Korea makes progress in denuclearization.

<Table III - 2> Resuming the North Korea-US Summit: by Supporting Party

	Democratic Party	PPP	Non-committed Party
2020 Nov.	79.6	65.6	70.2
2021 Apr.	81.2	52.7	66.8
2021 Oct.	80.1	72.2	73.8

6. US Economic Sanctions against North Korea

<Figure III - 6> US Economic Sanctions against North Korea



■ Survey Questions

- “How do you think the U.S.’s Biden administration should impose economic sanctions on North Korea?”
 - 1 = Economic sanctions on North Korea should be strengthened; 2 = Economic sanctions against North Korea should remain at the current level; 3 = Economic sanctions on North Korea should be eased; 4 = I don't know.

■ Prefer to Maintain Current Level of Economic Sanctions against North Korea

- In this survey, as in the survey in April, the percentage of respondents who stated that the current level shall be maintained was the highest.
 - People positively evaluating that the current level of US sanctions against North Korea may think that the sanction as some effect on managing the situation on the Korean Peninsula.
 - Rather than negatively evaluating that U.S. sanctions have failed to lead to changes in North Korea's attitude since the inauguration of the Biden administration, they seems to be weighing on the lack of North Korean nuclear provocation to raise tensions on the Korean Peninsula.

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IV

Perception of Neighboring Countries and Assessment on US-China Relations

IV. Perception of Neighboring Countries and Assessment on US-China Relations

1. Positive Feelings on Neighboring Countries

<Figure IV - 1> Positive Feelings on Neighboring Countries 2018-2021



■ Survey Questions

- "How much do you like or dislike _____? Please rate each of the following countries on a scale of -5 to 5, where -5 is "strongly dislike", 0 is "neither like or dislike", and 5 is "strongly like."
- Positive responses (1 to 5) to each countries are shown on the graph.

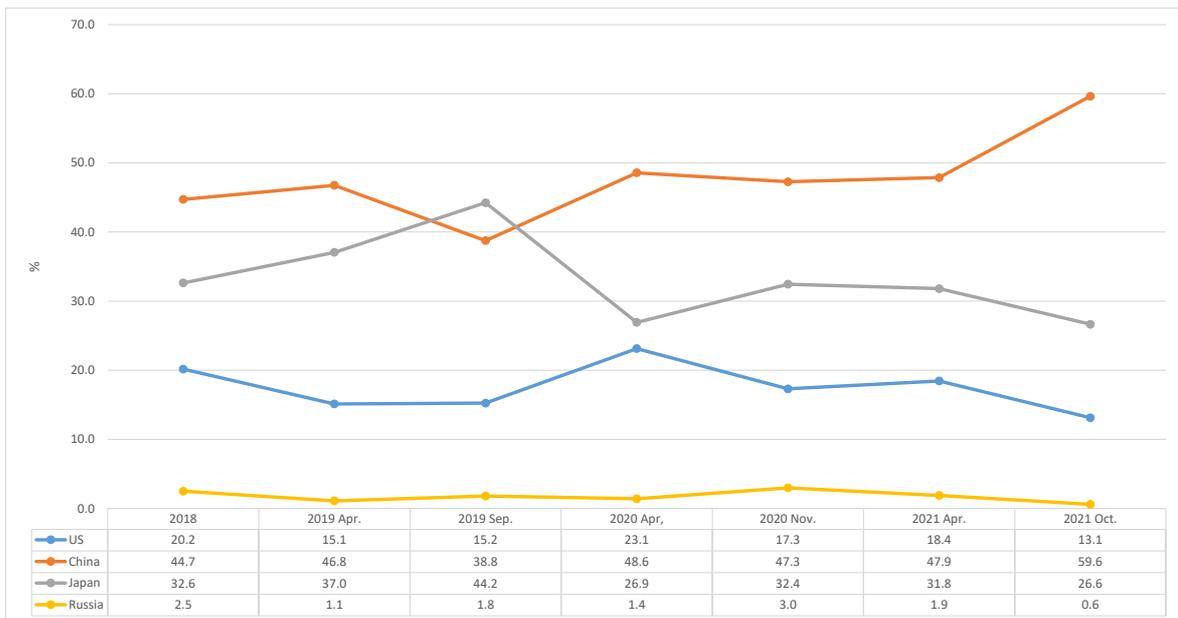
■ High Preference for the US

- Among the neighboring countries, positive attitudes for the US, an ally, remains overwhelmingly high. The US is the only country in which the majority of respondents expressed favor, and 66.2% of respondents showed favor with the US in this year's fall survey, which was similar to the results from last year.
 - On the other hand, positive attitudes for China (12.5%) and Russia (12.2%), which are politically and militarily friendly with North Korea, was found to be low at a similar level.
 - The positive attitudes for North Korea remains very low, and Japan also shows low positive attitudes at a similar level to North Korea.

- The low positive attitudes for North Korea seems to reflect the breakdown of North Korea - US negotiations and the situation in which South-North Korea and North Korea-US relations have made little progress since the launch of the Biden administration. In the case of Japan, it seems to reflect the situation in which the traditional national sentiment against Japan and Japan's trade retaliation against Korea have not improved.

2. Country that Does Not Want Unification

<Figure IV - 2> Country that Does Not Want Unification



■ Survey Questions

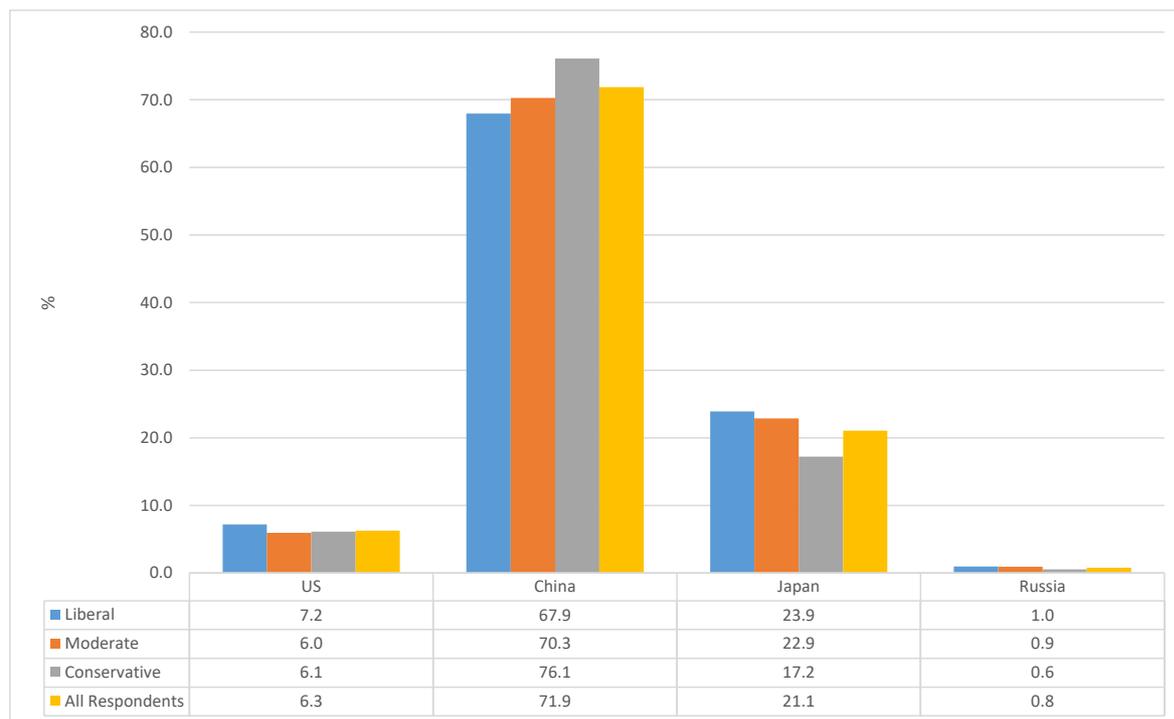
- “Which of the following country do you think will most not want unification of the two Koreas?”
 - 1=US; 2=China; 3=Japan; 4=Russia

■ The Country that Does Not Want Unification the Most is China

- Except the fact that Japan was selected in the 2019 survey when Japan’s trade retaliation against Korea began, China, which has friendly relations with North Korea, was evaluated as the country that does not want unification in each survey.
 - In this survey, 59.6% of the respondents, well over half for the first time since the start of the survey in 2018, chose China as a negative country for unification.
- The negative assessment of China seems to reflect concerns about China's recent intensifying challenge against the US, the only ally of South Korea, as well as its vigilance against North Korea since the Korean War.
- This also supports the fact that 71.9% of respondents in this year's survey pointed out China as the most threatening neighboring country to the security of South Korea.

3. The Most Threatening Neighboring Country

<Figure IV - 3> The Biggest Threat to South Korea



■ Survey Questions

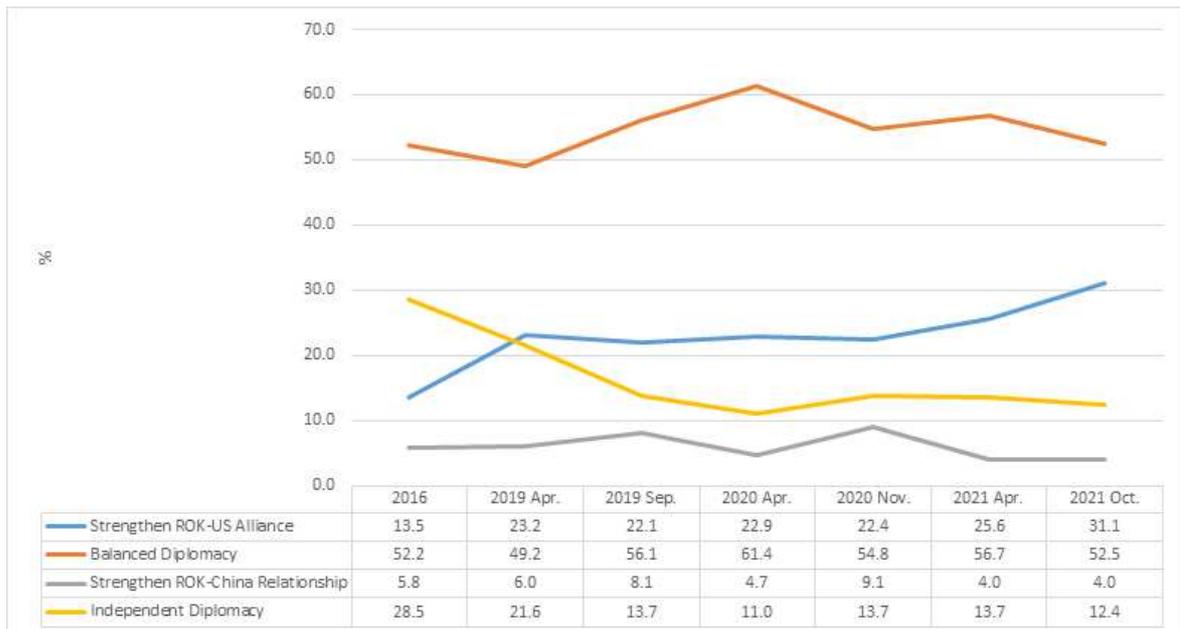
- “Which of the following neighboring countries do you think poses the biggest threat to the security of South Korea?”
 - 1=US; 2=China; 3=Japan; 4=Russia

■ China is the Biggest Threat to Security, Excluding North Korea

- Among the 4 neighboring countries, the overwhelming majority chose China as the country that poses the most threat to South Korea’s security (71.8%).
- The Seoul National University’s Unification and Peace Institute investigated the item of selecting the country that poses the biggest threat, including North Korea. According to the 2021 survey, 46% was China, 37.9% was North Korea, 11.3% was Japan, 3.9% was the US, and 0.9% was Russia.
- China’s coercive and disrespectful attitude toward neighboring countries, such as all-or-nothing diplomacy, and oppression of Hong Kong’s democratization movement and pressure on Taiwan make China a threat.
- When comparing by ideology, liberals were slightly higher in terms of considering Japan as a threat than conservatives. However, two thirds of liberals also pointed to China as the biggest security threat.

4. Direction of Diplomatic Policy towards US and China

<Figure IV - 4> Direction of Diplomatic Policy towards US and China



■ Survey Questions

- “What do you think Korea should do about its foreign policy with the U.S. and China in the future? Please select the answer nearest to your opinion.”
 - 1=We must strengthen our alliance with the United States rather than with China; 2=We must pursue balanced diplomacy between the United States and China; 3=We must strengthen our relationship with China rather than with the United States; 4=We must pursue independent diplomacy regardless of the United States and China.

■ Increase of Opinion to Strengthen ROK-US Alliance

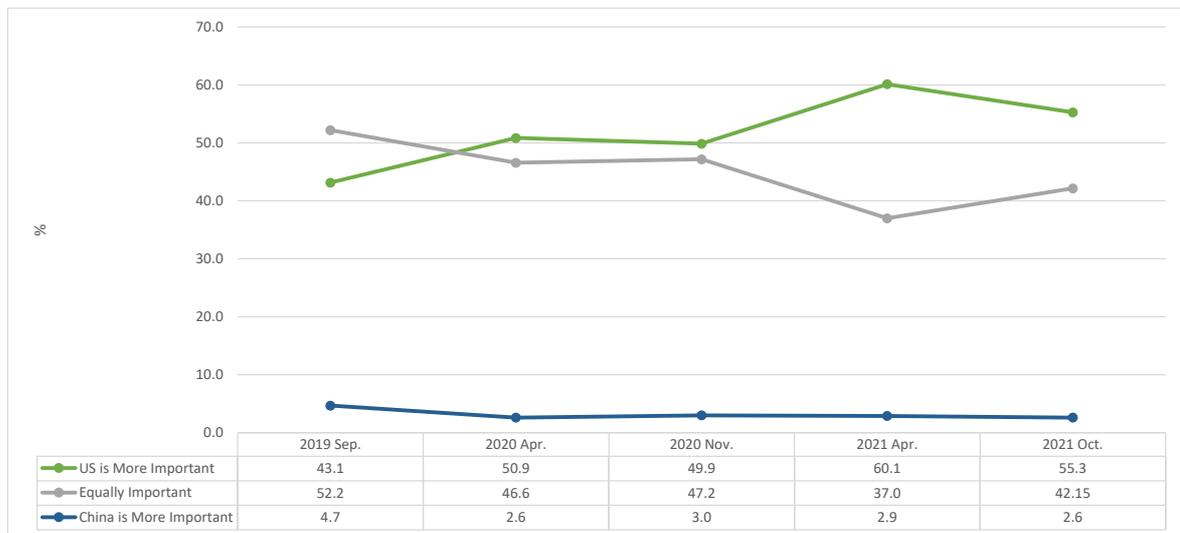
- Since the first survey in 2016, and excluding the 1st survey in 2019 that recorded 49.2%, the percentage of respondents that preferred balanced diplomacy remained in the majority.
 - The next preference for the directions of diplomatic policy is to strengthen alliances with United States, which has been the second highest support since the first survey in 2019.
- Especially, the percentage in favor of strengthening alliance with the US is on the rise, reaching 31.1% in the October 2021 survey.

- The percentage in favor of strengthening the alliance with China remains low at less than 10%, and both surveys this year showed lower at 4.0%.
 - In the October 2021 survey, the percentage of preference for strengthening alliances with the US was eight times higher than that of preference for alliances with China.

- Korean people prefer balanced US-China diplomacy the most, However, more preference for ROK-US Alliance over ROK-China alliance can be assessed as an appropriate distribution of preferences considering the inevitable influence of the two powers and the reality of international politics.
 - This is supported by the fact that the preference for independent diplomacy has remained relatively low just over 10% since the second survey in 2019.

5. Security of ROK and Relative Importance of US-China

<Figure IV - 5> Korea's Security: Relative Importance of US-China



■ Survey Questions

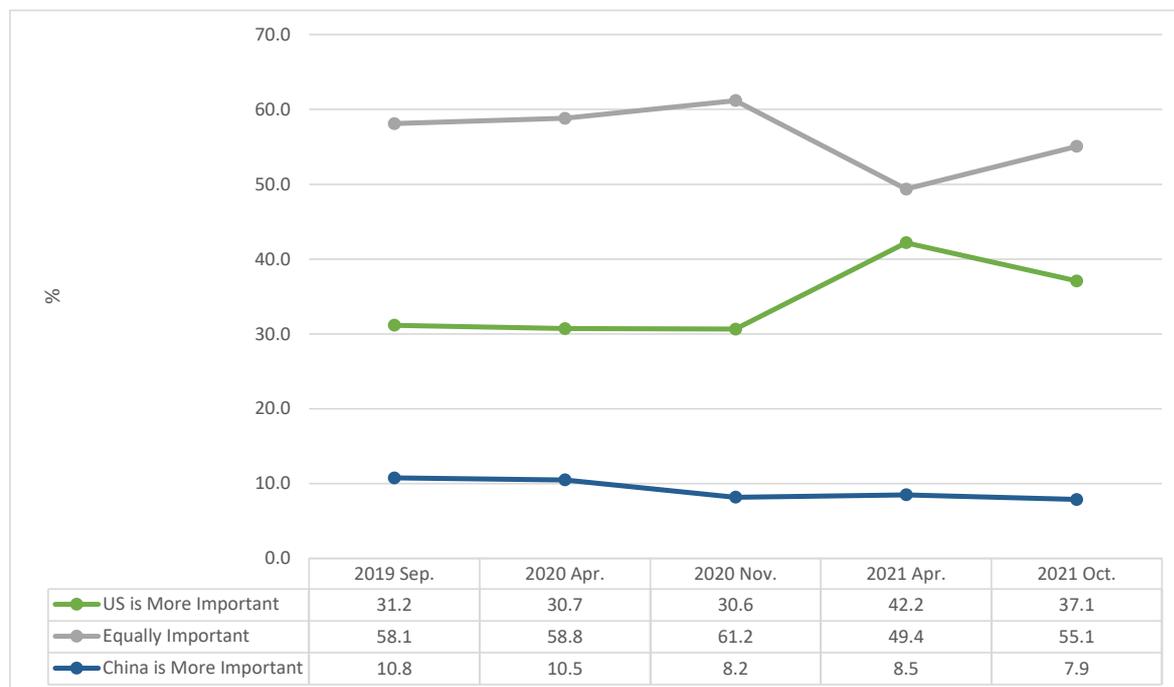
- “Between US and China, which country do you think is more important to the security of Korea?”
 - 1=US is much more important than China; 2=US is somewhat more important than China; 3=US and China are equally important; 4=China is somewhat more important than US; 5=China is much more important than US.

■ Korea's Security and Relative Importance of the US

- Excluding the first survey in 2019, more than half of the respondents responded that the US was much more important than China, or that the US is important for Korea's security since the first survey in 2020. Next, about 40% of the respondents said that the US and China were similar.
- The results of the April and October 2021 surveys reflected expectations for the Biden Administration. In the survey before 2020, there was a high probability of negative assessment of US in terms of security due to Trump Administration's pressure to raise defense cost sharing.

6. Economy of ROK and Relative Importance of US-China

<Figure IV - 6> Economy of Korea: Relative Importance of US-China



■ Survey Questions

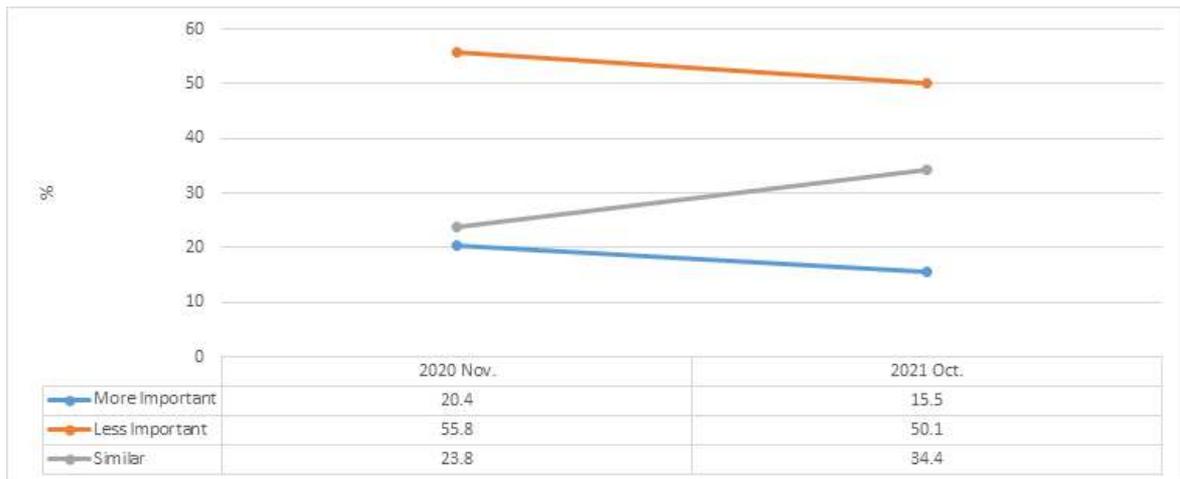
- “Between U.S. and China, which country do you think is more important to the economy of Korea?”
 - 1=US is much more important than China; 2=US is somewhat more important than China; 3=US and China are equally important; 4=China is somewhat more important than US; 5=China is much more important than US.

■ Even for Korea’s Economy, the US is More Important than China

- For Korea’s economy, the percentage that the US is more important than China, or that the US is important, was around 30% more than those that responded that China is more important. Also, since the inauguration of the Biden Administration, this positive rate has increased.
 - For example, in this year’s second survey, 37.1% of the respondents responded that US was much more important (16.9%) or important (20.2%) to Korea’s economy, about 7%P higher than the 2020 survey, which recorded around 30%.

7. Changes in the US Leadership in the World

<Figure IV - 7> Changes in the US Leadership in the World



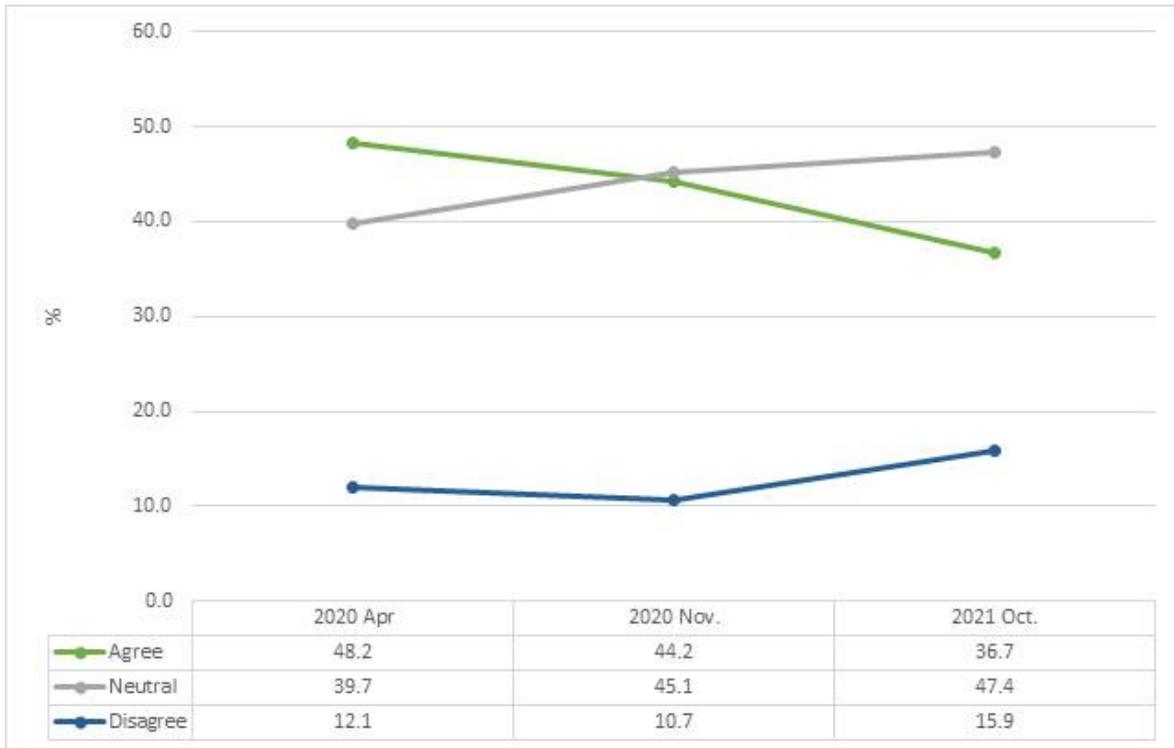
■ Survey Questions

- “How do you view the importance of America's role as a world leader compared to 10 years ago?”
 - 1 = Plays a more important role than 10 years ago; 2 = Plays a less important role than 10 years ago; 3 = Plays a similar role as 10 years ago

■ Increase of Disappointment over US Global Leadership

- 50% of the Korean people believe that the importance of the US as a global leader is decreasing compared to the past decade.
 - There was a decrease by about 6%P compared to the survey a year ago. The percentage of people who believe that the importance of the United States as a global leader has grown was also about 16%, down 5% from last year's survey.
- This judgment of the Korean people on the United States was also found to have shifted to the perception of participation in the US-led world order. (<Figure IV-8>)

<Figure IV - 8> Participation in the US-led World Order



■ Survey Questions

- “South Korea needs to actively cooperate with the U.S. to help maintain the U.S.-led global order not only in matters related to the Korean peninsula but other international ones.”
 - 1=strongly disagree; 2=somewhat disagree; 3=neither agree nor disagree; 4=somewhat agree; 5=strongly agree
 - “Agree”=4+5; “Neutral”=3; “Disagree”=1+2

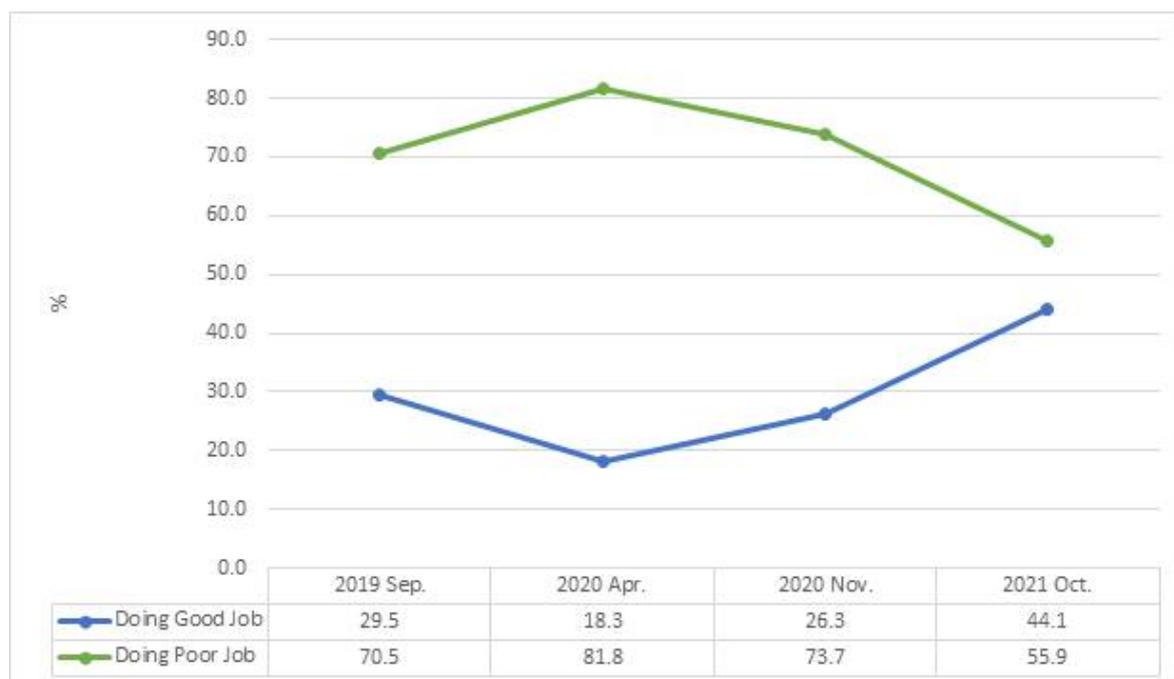
■ Decrease in Agreement to Participate in Maintaining the World Order of the US

- Negative attitudes (Do not agreed at all, not agree) and reserved attitudes increased during the three investigations. On the other hand, the percentage of people who agreed decreased.
- In all three surveys, it was found that relatively young cohorts did not agreed to participate in the US-led world order.
- However, an increase in negative attitudes was found evenly across generations.

- These results suggest that the younger generation, who will become the mainstay of Korean society in the future, will no longer take the US-led world order naturally or for granted.

8. US as a Global Leader

<Figure IV - 9> US as a Global Leader



■ Survey Questions

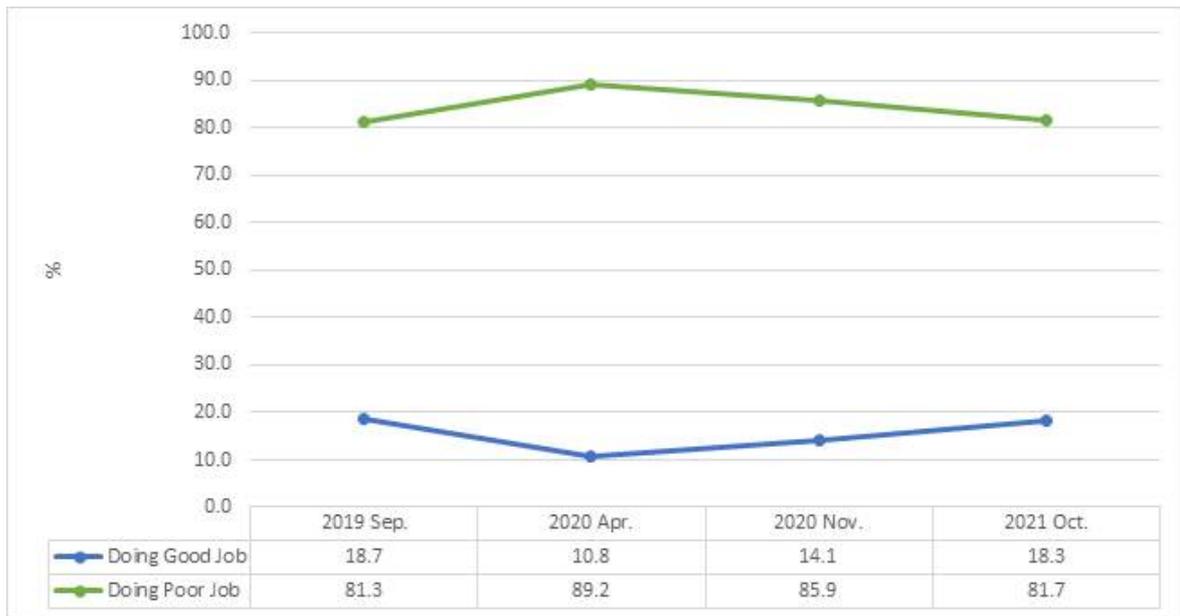
- “In your opinion, is the United States currently doing a good job as a global leader?”
 - 1=Not doing a good job at all; 2=Not doing a good job in particular; 3=Doing a good job; 4=Doing an excellent job

■ Increase of Positive Assessment of US Leadership

- Since the inauguration of the new Biden administration, the negative assessment of the role of the global leader of the United States has decreased significantly.
 - In the 2021 survey, the percentage evaluated as good (42.2%) or very good (2.0%) was 44.4%, up to 25.9% (18.3% in the first round of 2020) from the previous survey results.
- This result reflects expectations for the Biden government, and it seems that such positive expectations are maintained even one year after the presidential election.
- However, the fact that the positive assessment rate of the US is still low, suggesting that the positive assessment of allies may be highly likely to be flexible depending on the situation.

9. China as a Global Leader

<Figure IV - 10> China as a Global Leader



■ Survey Questions

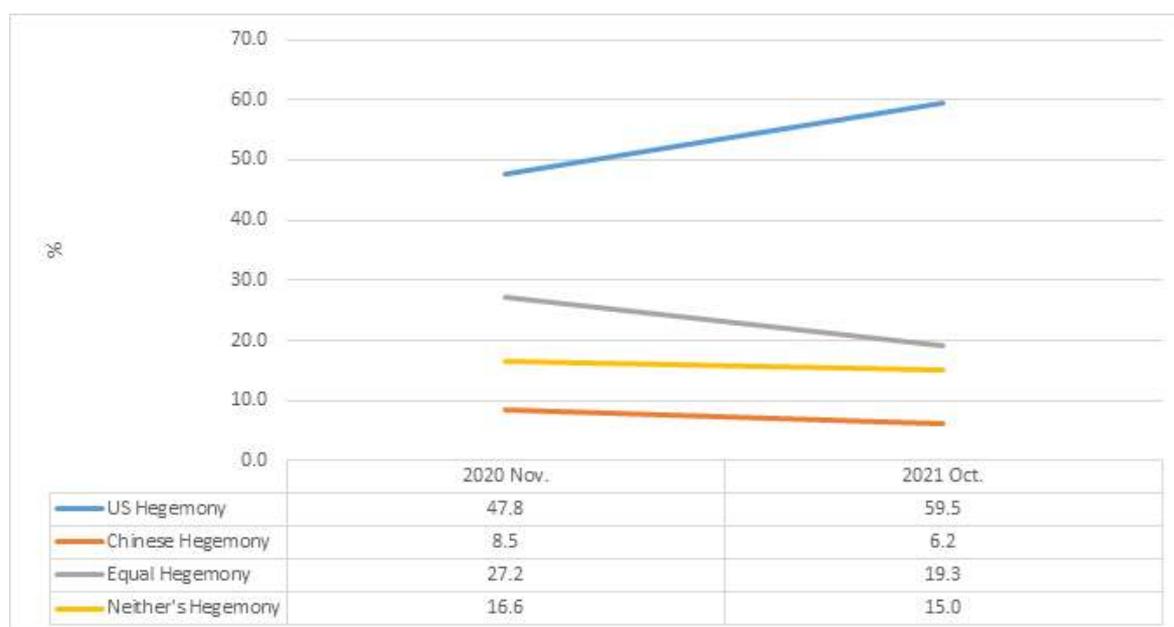
- “In your opinion, is China currently doing a good job as a global leader?”
 - 1=Not doing a good job at all; 2=Not doing a good job in particular; 3=Doing a good job; 4=Doing an excellent job

■ Negative Assessment on the Leadership of China is Maintained

- Negative evaluation of China's role as a leader is maintained high.
- Especially, the negative assessment that China is not playing a very good role at all was 27.4%, about 5.7 times higher than that of the U.S. (4.8%).
- In the same context, the positive assessment that China is playing a good role as a global leader remains lower than that of the United States. Furthermore, only one or two people out of one thousand respondents of each survey evaluated that China plays a very good leadership role in each survey

10. Hegemonic Competition between US and the China

<Figure IV - 11> Preference for Hegemony between US and China



■ Survey Questions

- “The US and China are competing for hegemony over economy and security. Which country do you want to have an advantage in the US-China competition?”
 - 1 = I want America to have an advantage; 2 = I want China to have an advantage; 3 = I want both countries to have equal hegemony; 4 = I don't want both the US and China to hold hegemony in the world.

■ Overwhelming Preference for US Superiority for International Order

- In both last year's survey and this year's survey, it turned out that US superiority for international order was overwhelmingly preferred.
 - The percentage of preference for US superiority rose 11.7%p from 47.8% to 59.5%, while the percentage of preference for Chinese superiority fell 2.3%p from 8.5% to 6.2%, which is less than 10%.
- In the October 2021 survey, the percentage (19.3%) of favoring equal hegemony between the United States and China and the percentage (15.0%) of opposition to hegemony in either country were much lower than that of favoring the United States.

- In summary, respondents consistently preferred the international order of the US with overwhelming favor over other neighboring powers, and the respondents said that the US is more important than China in security and economy. Also, US is positively assessed to play the role as a leader of the international society.

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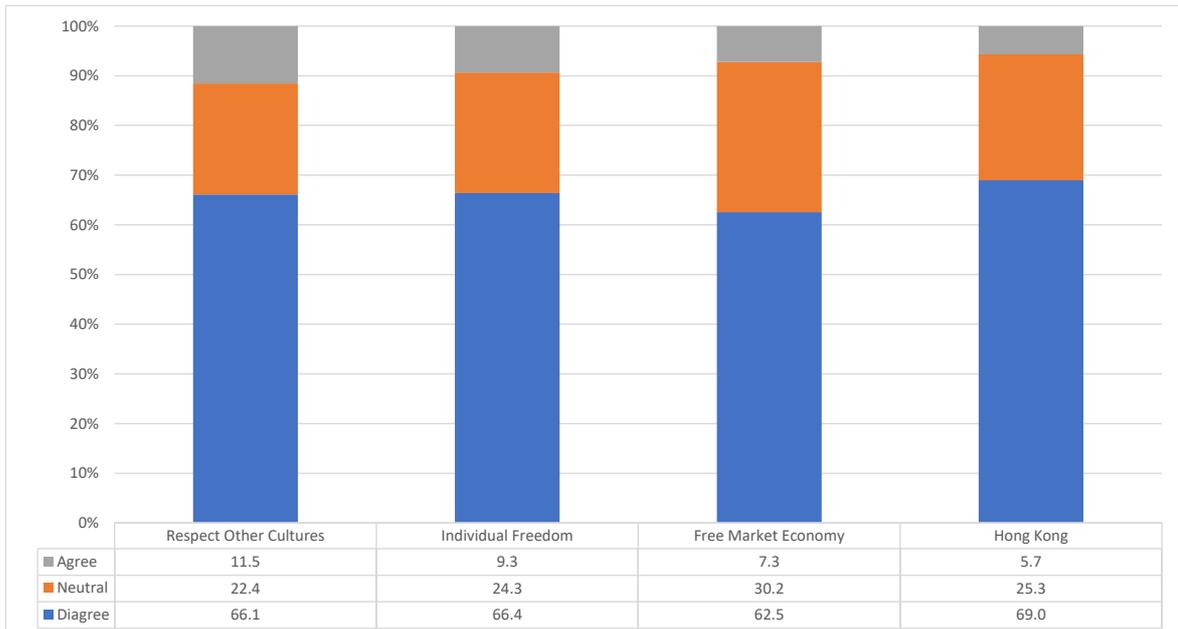
V

ROK-China Relations and Perception of China

V. ROK-China Relations and Perception of China

1. Perception of China: Democratic Values

<Figure V - 1> Perception of China: Democratic Values



■ Survey Questions

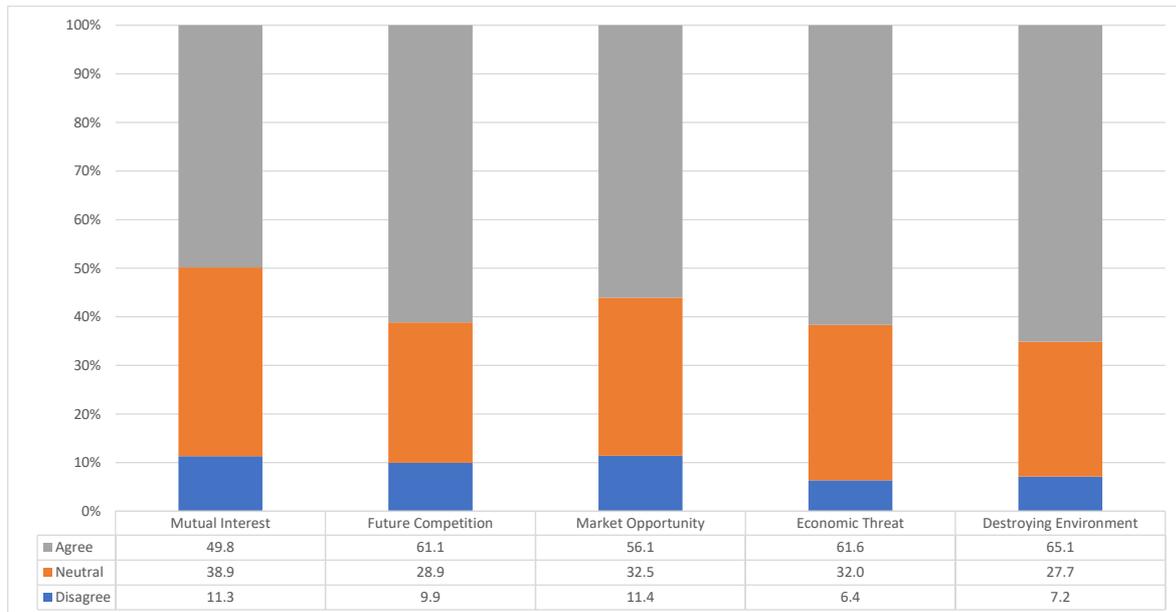
- “China respects the culture and politics of other countries(Respect Other Cultures)”; “China respects individual freedom(Individual Freedom)”; “China upholds the principles of free market economy(Free Market Economy)”; “China wants to solve the Hong Kong problem with democratic principles(Hong Kong)”
- 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
- “Agree”=4+5; “Neutral” = 3; “Disagree” = 1+2

■ Extremely Negative Perception of China’s Compliance with Democratic Values

- Only around 10% of the respondents agreed that China complies well with democratic values. Especially, 70% of them do not expect China to democratically resolve the issue regarding Hong Kong.
- This suggests that the more democratic values are emphasized in South Korea, the more negative perceptions of China can be intensified.

2. Perception of China: Economic Interest

<Figure V - 2> Perception of China: Economic Interest



■ Survey Questions

- “South Korea and China help each other’s economy(**Mutual Interest**)”; “South Korea and China will have economic competitions in the future(**Future Competition**)”; “China’s large market provides us with opportunities(**Market Opportunity**)”; “China will be a threat to the sectors that South Korea currently has an edge in the global market (semiconductor, shipbuilding, etc.)(**Economic Threat**)”; “China does not care about destroying the natural environment of neighboring countries for its own development(**Destroying Environment**)”
- 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
- “Agree”=4+5; “Neutral” = 3; “Disagree” = 1+2

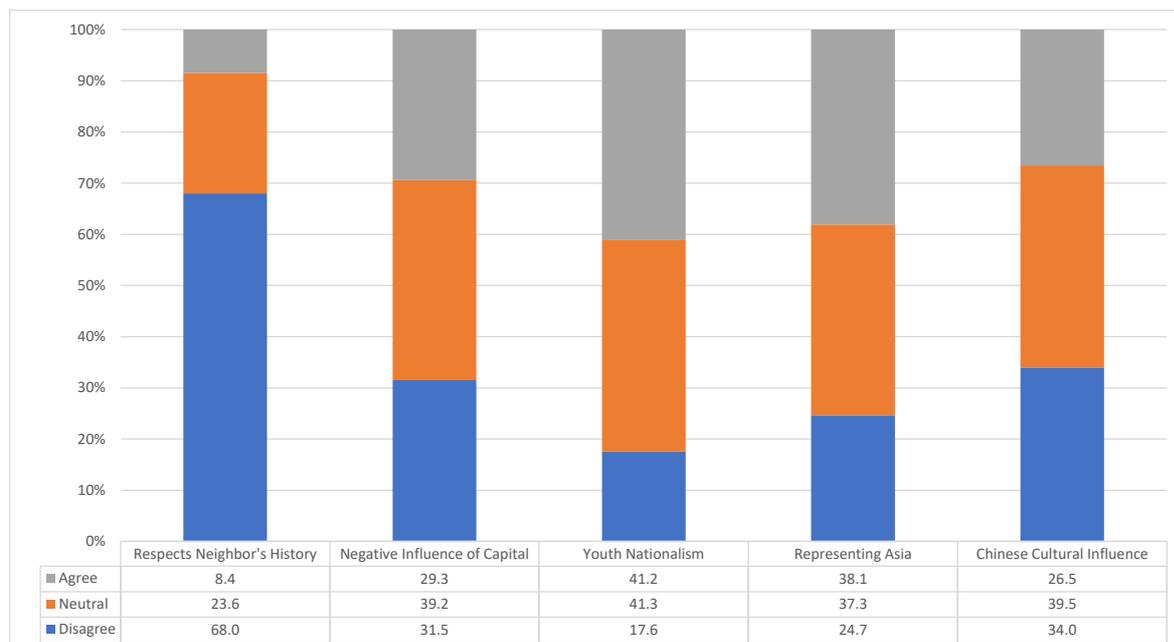
■ China as a Trading Partner

- About half of respondents believe that South Korea and China can benefit each other economically, and the positive assessment of China’s huge market reaches 56.1%. However, in terms of economy, there is a mixture of vigilance and negative perceptions of China.

- 65.1% of the respondents also believe that China is harming the natural environment of neighboring countries for their economic development. This shows that one of the main causes of weakening the foundation for positive perception of China may be the controversy over fine dust from China.
- If South Korean and China fail to identify the cause of fine dust through objective and scientific investigations and to draw the agreed solution for the pollution issue, negative perceptions of China can be expected to continue.

3. Perception of China: History and Culture

<Figure V - 3> Perception of China: History and Culture



■ Survey Questions

- “China respects the history of its neighboring countries(Respect Neighbor’s History)”; “Chinese capital is negatively affecting the content of Korean dramas and movies(Negative Influence of Capital)”; “Chinese youth are too nationalistic(Youth Nationalism)”; “China represents entire Asian countries(Representing Asia)”; “South Korea is still influenced by Chinese culture(Chinese Cultural Influence)”
- 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree

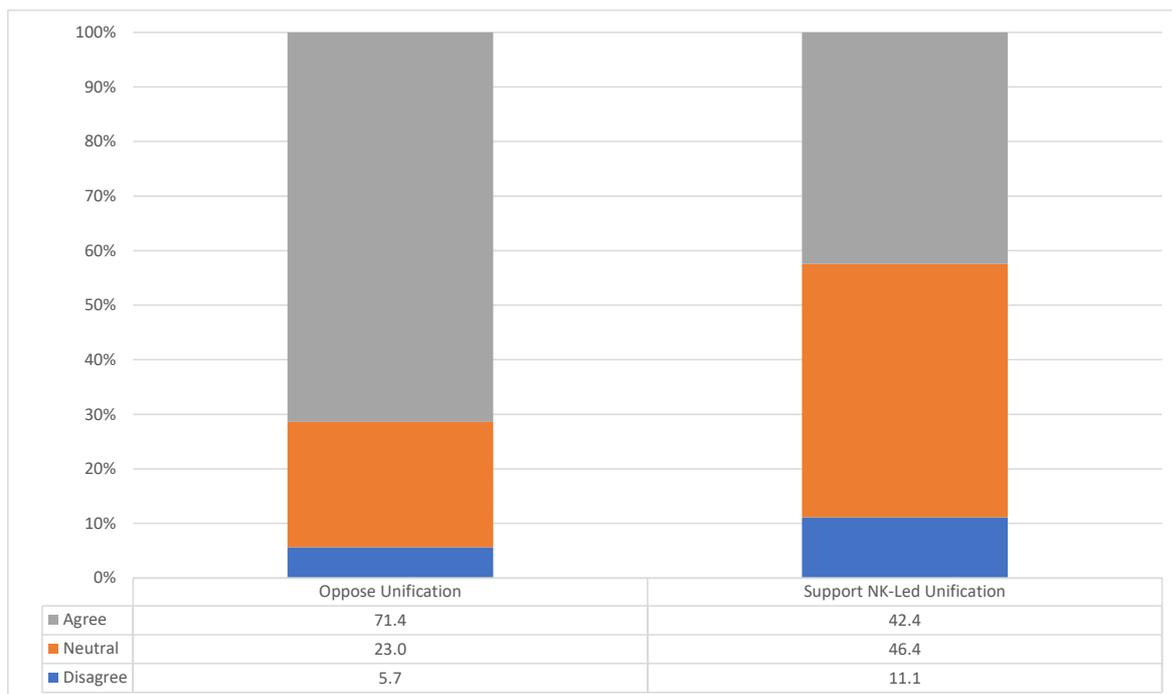
■ Historical and Cultural Factors Show Multi-layered Aspects of Perception of China

- More than two thirds of the respondents said China does not respect the history of neighboring countries.
- On the other hand, it can be seen that opinions on exerting influence on Korean cultural content through Chinese capital are tightly divided. This may reflect confidence in the Korean culture and soft power.

- More people are concerned about the strong nationalistic tendency of Chinese youth. This could lead to the negative prospect for future ROK-China relations.
- However, apart from negative perceptions, 38.1% view China as a representative of Asia, and 26.5% view South Korea is under influence of Chinese culture.
- From these results, it can be inferred that historical and cultural factors lie behind the various attitudes that are shown in the mixed assessment of China or China-related issues.
- Therefore, in order to understand the perception of China, it is necessary to approach in the aspect of Korean soft power.

4. China and the Unification of the Korean Peninsula

<Figure V - 4> China and Korean Unification



■ Survey Questions

- “China does not want North and South Korea to be unified for China's own interests(Oppose Unification)”; “China will not oppose North Korea-led socialist unification(Support NK-Led Unification)”
- 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
- “Agree”=4+5; “Neutral”=3; “Disagree”=1+2

■ Regarding the Unification of the Korean Peninsula, Koreans Perceive China Very Negatively

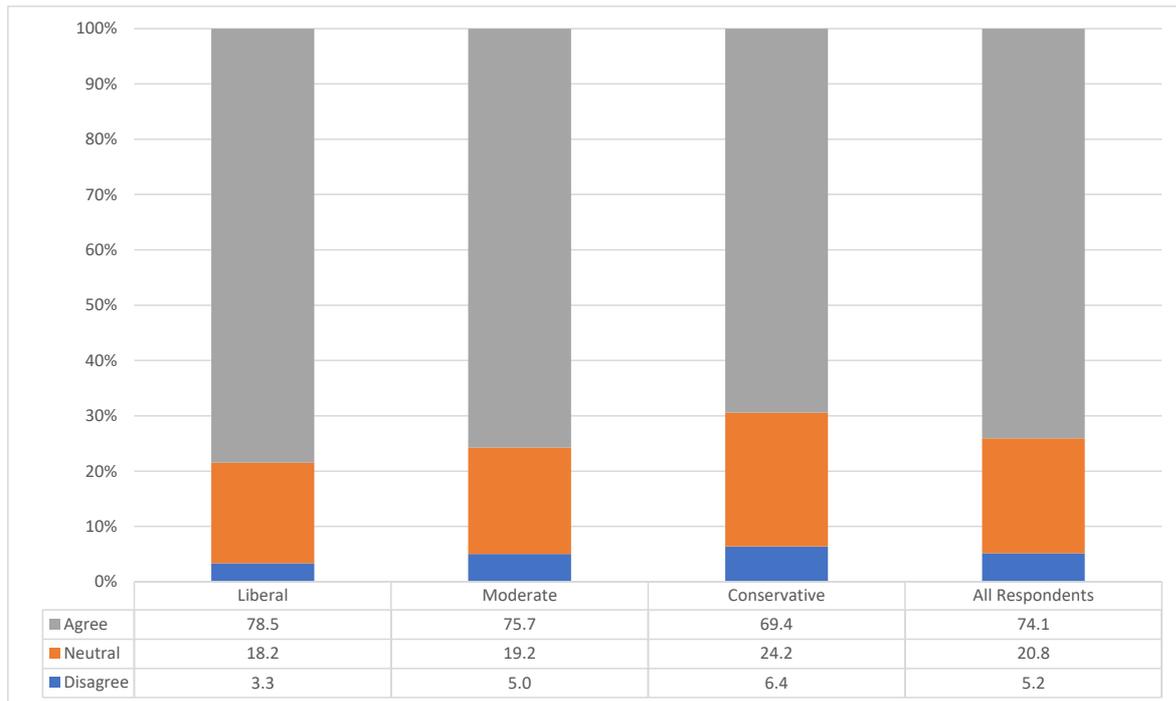
- More than 70% of respondents agreed with the statement that China does not want to unify the Korean Peninsula for its own benefit. Only 5.7% disagreed. This is consistent with 59.6% choosing China as the least desired country among neighboring countries for unification of the Korean Peninsula.
- The fact that 42.4% believed that China probably does not want the Korean

Peninsula's unification and that China would not oppose socialist unification led by North Korea shows that South Koreans perceive China very negatively regarding unification.

- In summary, the majority of Koreans do not believe that peaceful unification can be achieved through improved relations with China.

5. Responsibility of China on the Spread of COVID-19

<Figure V - 5> COVID-19 and China's Responsibility



■ Survey Questions

- "China is most responsible for the global spread of COVID-19"
 - 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
 - "Agree"=4+5; "Neutral"=3; "Disagree"=1+2

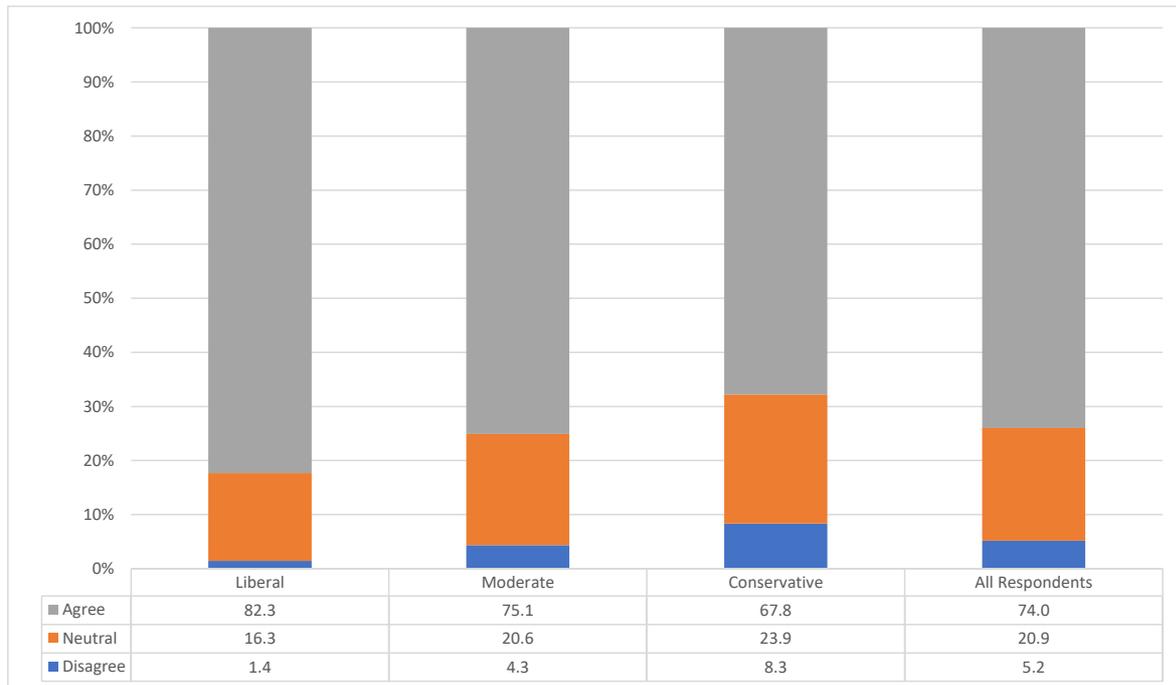
■ A Simple Schematic Error of Liberals being Pro-China and Conservatives being Anti-China

- There is a conventional notion that conservatives are negative about China in that some conservatives have consistently used the word "Wuhan pneumonia" instead of the official name of COVID-19.
- Overall, 74.1% agreed with the statement that China is most responsible for the global spread of COVID-19. In other words, the majority of respondents confirmed that they have a very negative attitude toward China regarding the spread of COVID-19.

- Contrary to conventional wisdom, the percentage of respondents who answered that China is responsible for the spread of COVID-19 was rather the highest among the Liberals(78.5%). This shows that the simple schematic of liberals being pro-China and conservatives being anti-China is not correct.

6. Response to China's Economic Retaliation

<Figure V - 6> Response to China's Economic Retaliation



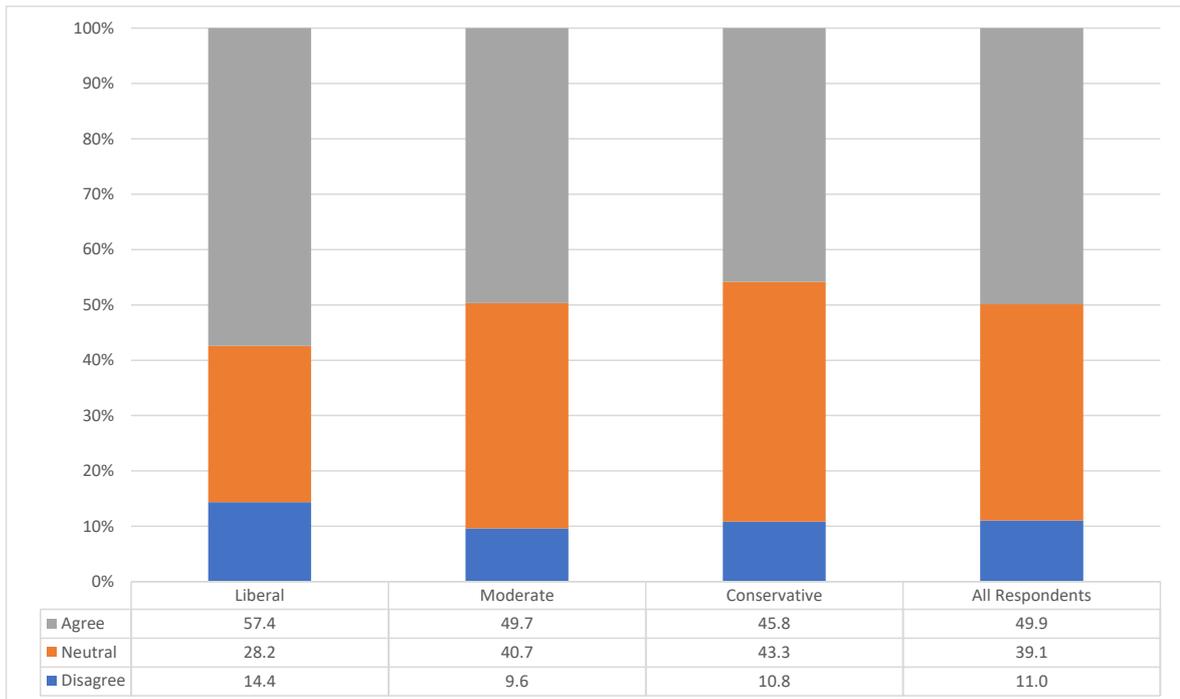
■ Survey Questions

- "South Korea should actively respond to China's economic retaliation"
 - 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
 - "Agree"=4+5; "Neutral"=3; "Disagree"=1+2

■ Liberals Prefer Strong Measures

- 74.0% of all respondents agreed to strongly respond to China's economic retaliation.
- Contrary to the conventional wisdom, the percentage of people who agreed to strong responses to China was rather the highest among the liberals (82.3%).
- On the other hand, although there are many conservatives who agreed, the percentage was 67.8%, and statistically significant differences were found between the two groups.

<Figure V - 7> ROK's Capacity to China's Retaliation



■ Survey Questions

- "South Korea has the capacity to withstand China's economic retaliation."
 - 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
 - "Agree"=4+5; "Neutral"=3; "Disagree"=1+2

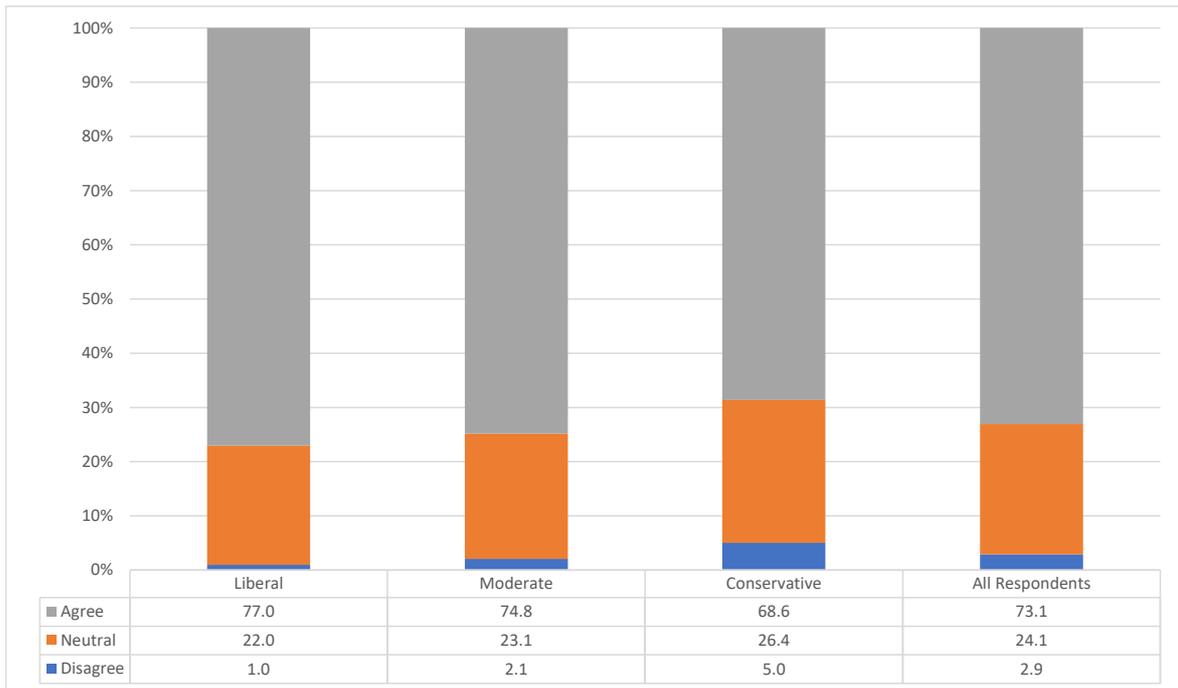
■ Confidence in South Korea's Ability to Respond to China's Economic Retaliation

- Half (49.9%) of the respondents chose that Korea is capable of enduring China's economic retaliation. Only 11.0% disagree.
- The percentage (57.4%) of the liberals that they believe is sufficient to withstand China's economic retaliation was clearly higher than that of the moderate group (49.7%) or the conservative group (45.8%).
- This is consistent with the fact that the percentage of people who chose to respond actively to China's economic retaliation earlier was higher in the liberals group than in the conservative group.

- Therefore, it can be inferred that the liberals evaluates Korea's ability more positively than the conservatives, and based on this, liberals show an attitude that South Korea should respond more actively to China's economic retaliation.

7. China's Attempt to Distort History

<Figure V - 8> China's Attempts to Distort History



■ Survey Questions

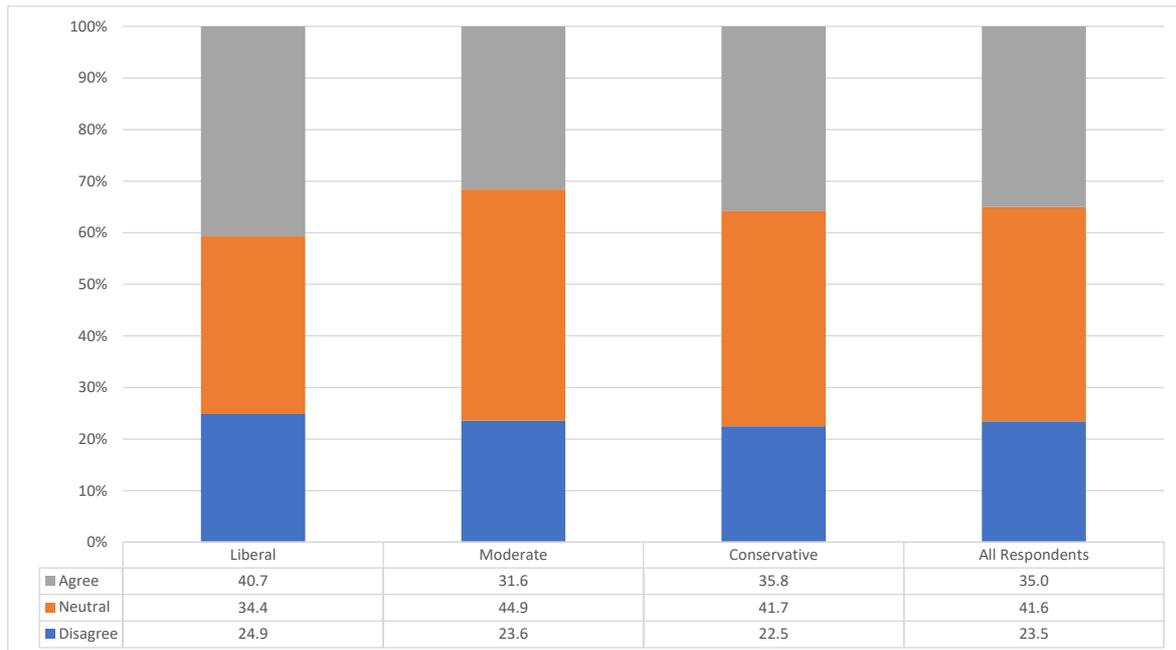
- "We must deal strongly with China's attempts to distort history."
 - 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree
 - "Agree"=4+5; "Neutral"=3; "Disagree"=1+2

■ Liberals Call for the Most Active Response to China's Historical Distortion

- 73.1% agreed with the statement that China's attempts to distort history should be dealt with strongly, 24.1% were neutral, and only 2.9% disagreed. This means that the majority of the people supported strong response.
- As with the results of the strong response to the aforementioned China's economic retaliation, the percentage of people who agreed to actively cope with China's historical distortion was the highest for liberals (77.0%).
- On the other hand, conservative was 68.6%, and statistically significant differences were found between the two ideological groups.

8. Hong Kong's Democratization Movement and South Korea

<Figure V - 9> Supporting Hong Kong's Democratization Movement



■ Survey Questions

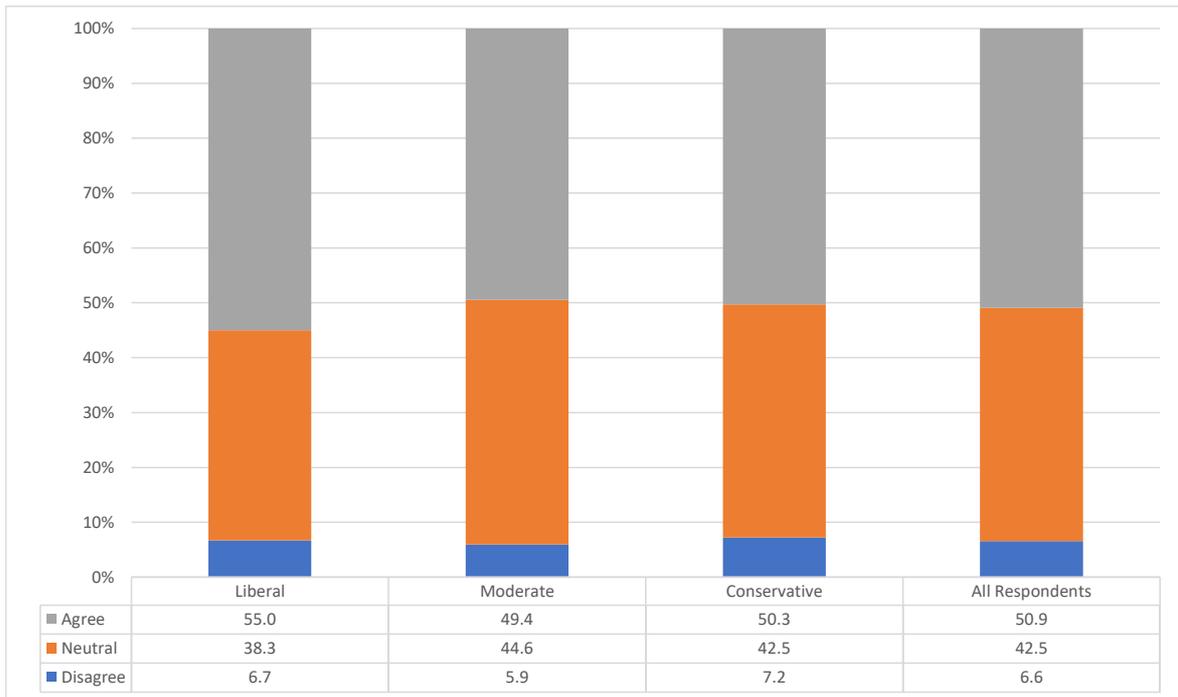
- "Hong Kong's democratization movement is an internal affair of China, so we should not interfere."
- 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree

■ Ideological Differences and Hong Kong

- Opinions on Hong Kong's democratization movement differed depending on ideology.
- In general, the pros and cons of the liberal group are more clearly divided. In other words, 40.7% of the liberal respondents said it should not be involved, and 24.9% opposed it, higher than the moderates or the conservatives.
- This may be because liberals are divided into two groups: those who sympathize with the Hong Kong democratization movement against the authoritarian government and those who oppose intervening in other countries' internal problems.
- On the other hand, the moderates had the highest neutrality of 44.9%, and only 31.6% agreed. This trend is also confirmed in respondents of the conservative group.

9. Defending Taiwan from China

<Figure V - 10> Defending Taiwan from China



■ Survey Questions

- “If China wants to unify with Taiwan by force, South Korea should join the effort to prevent it.”
 - 1=Strongly disagree; 2=Somewhat disagree; 3=indifferent; 4=Somewhat agree; 5=Strongly agree

■ Hong Kong as a Part of China, Taiwan as an Independent Country

- Rather than the opinion to participate in the Hong Kong democratization movement (35.0%), a greater percentage of the respondents agreed to participate in the effort to stop unification of Taiwan military by force.
- South Koreans view Hong Kong as a part of China, but Taiwan as independent and sovereign country from China.
- The difference among ideologies on this issue is not statistically and practically significant.

