



2013 CHINA NATIONAL IMAGE GLOBAL SURVEY



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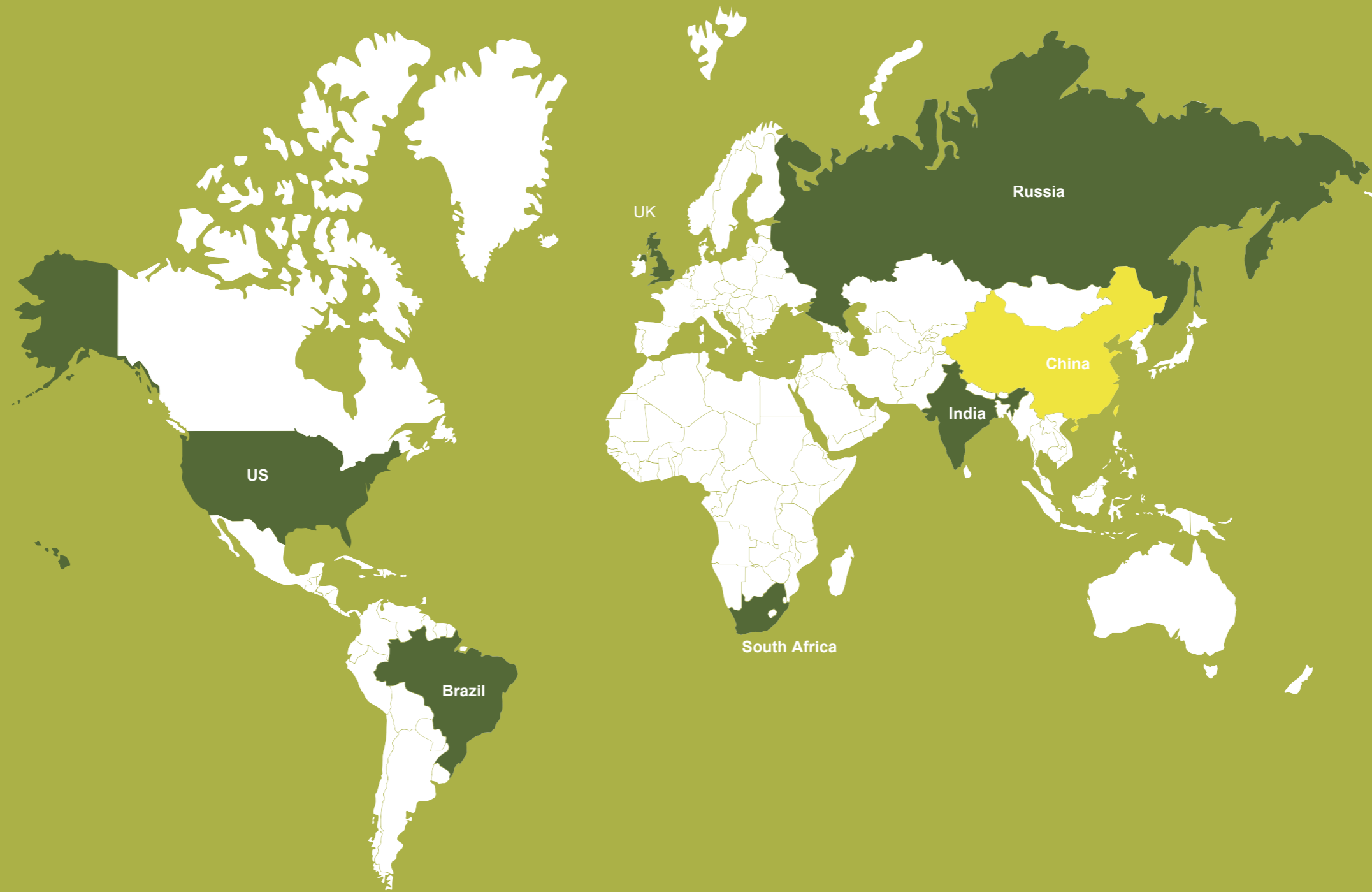
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PART 1 ABOUT THE 2013 SURVEY

From September to October 2013, the Center for International Communication Studies of China Foreign Languages Publishing Administration, the Charhar Institute, and Millward Brown jointly conducted the second global survey of China's national image. The survey interviewed the citizens of seven countries representing different geographic regions and stages of economic development, including both major developed countries—the UK (Europe) and the US (North America)—and the five BRICS countries—South Africa (Africa), India

(Asia), Russia (Europe), Brazil (Latin America) and China (Asia). A total of 3,017 respondents selected from the global panel of Lightspeed Research, a subsidiary unit of Millward Brown, were included in this survey. The survey was organized in the form of an online questionnaire and in strict compliance with international standards for online surveys. In order to ensure the sampling representativeness of the countries involved, the samples were distributed among local residents aged between 18 and 55 years old.

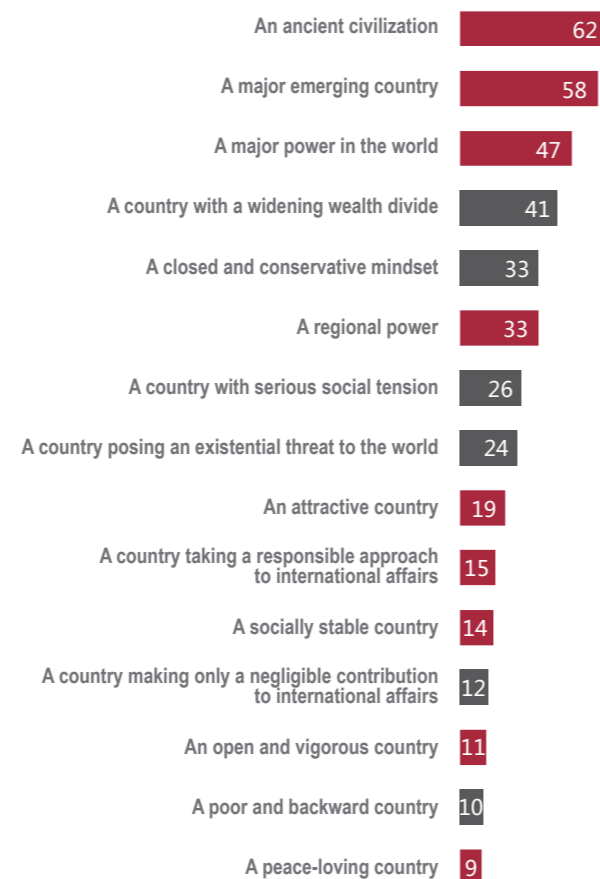
PART 2 CHINA'S NATIONAL IMAGE AND IMAGE OF CHINESE CITIZENS

China's national image

China's "ancient civilization" status is the most recognized characterization of China, which is appreciated by 62% of international respondents. "Major power" comes second in the list: 58% of the respondents see China as a major emerging country and 47% recognize China as a major power in the world. According to the survey, the main challenges facing China include the widening wealth divide (41%), a closed and conservative mindset (33%), and serious social tension (26%). About a quarter of the foreign respondents think China poses an existential threat to the world; there are more people who believe that China takes a responsible approach to international affairs (15%); 12% of people think China is making only a negligible contribution.

Figure 1
China's National Image

* The row length denotes the percentage of respondents agreeing with each statement on the left



Question
How do you see China?

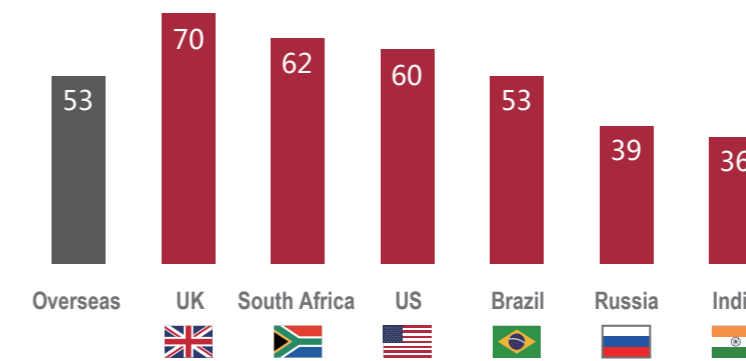
China is widely recognized as a country with an ancient civilization and a major power in the world today.

Image of Chinese citizens

The image of the Chinese ranks fifth among the 11 countries covered in the survey. More than half of those surveyed are willing to engage with the Chinese. Over two-thirds of Britons enjoy their experiences with the people of China, yet Russians and Indians are the least willing to interact with the Chinese.

Figure 2
Proportion of foreign respondents willing to engage with the Chinese

* The figure shows the percentage of respondents who chose "Chinese"



Question
Are you willing to interact with the citizens of the following countries?

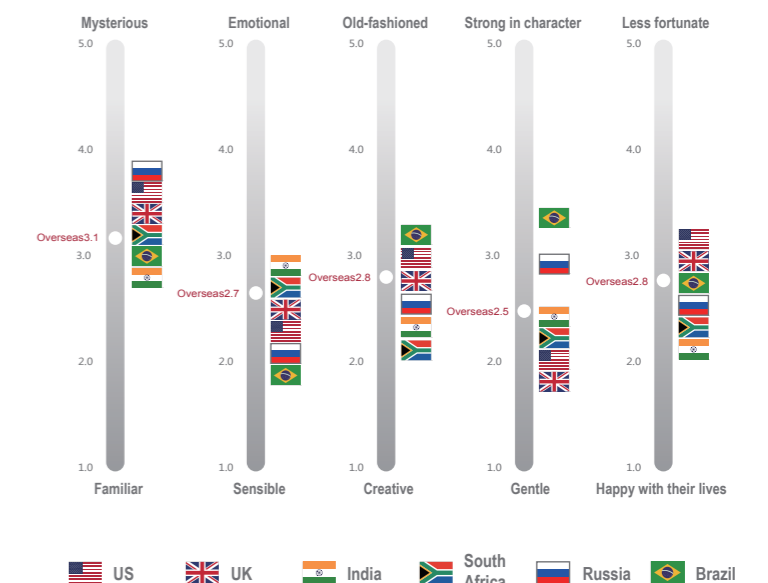
In the eyes of non-Chinese respondents, the people of China are mysterious, sensible, creative, mild and happy with their lives. More than half of the foreign respondents have enjoyed their experiences with the Chinese.

Generally speaking, in the eyes of international respondents, Chinese people are mysterious, sensible, creative, gentle and happy with their lives. However, the perceptions of the Chinese also vary from country to country: Indians believe they know the Chinese best, while the Russians think the Chinese are the most mysterious. Brazilians think the Chinese are sensible, old-fashioned and strong in character. South Africans think the Chinese are the most creative. Britons think the Chinese are the most gentle. Indians think the Chinese are the happiest, while Americans think the Chinese are leading a less fortunate life.

Figure 3
Chinese Citizens

* The figure shows the average score of each word

Question
Which of the following words would you use to describe the Chinese?



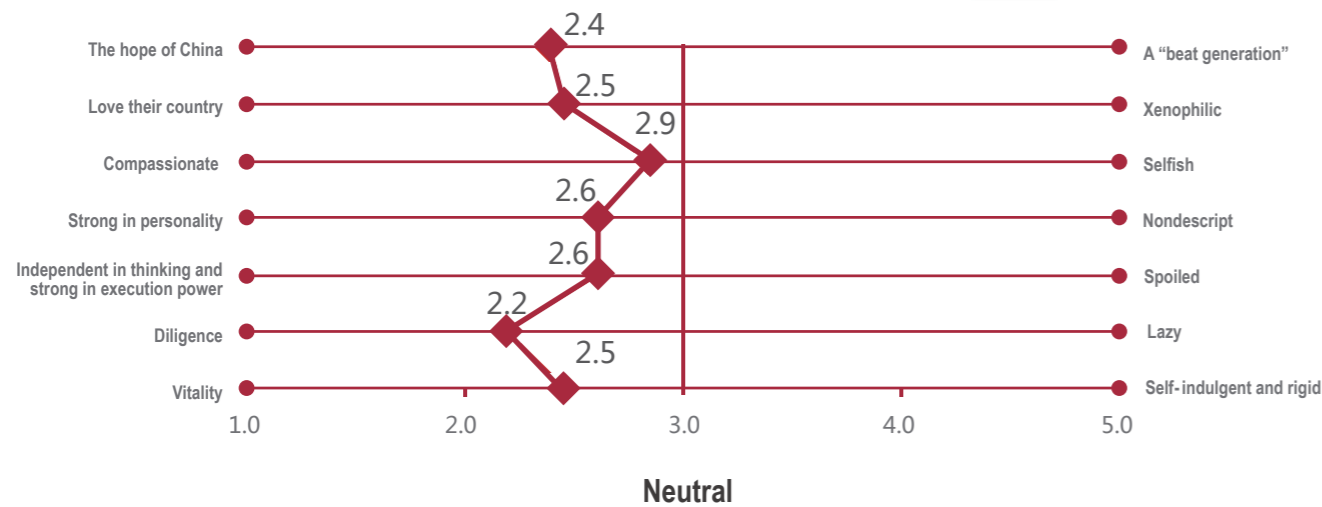
Chinese youth are widely recognized: Hardworking, energetic and seen as the hope of China.

On the whole, non-Chinese respondents are very positive about the Chinese youth. They think the young people represent the hope of China and love their country. The most often mentioned characters of young Chinese, in descending order, include diligence, vitality, independent thinking, execution power, strong personality and compassion. The Chinese youth are more patriotic in the eyes of the foreign audience vis-à-vis how they view themselves. Meanwhile, the young people of China are also not as lazy and spoiled to non-Chinese as in the eyes of the Chinese.

Figure 4
Young Chinese

* The figure shows the average scores

Question
How do you see young Chinese?



PART 3 CHINA'S IMAGE IN CULTURE AND SCIENCE & TECHNOLOGY

Culture and science & technology are the most well-known aspects of China: Being familiar to about 30% of the foreign respondents.

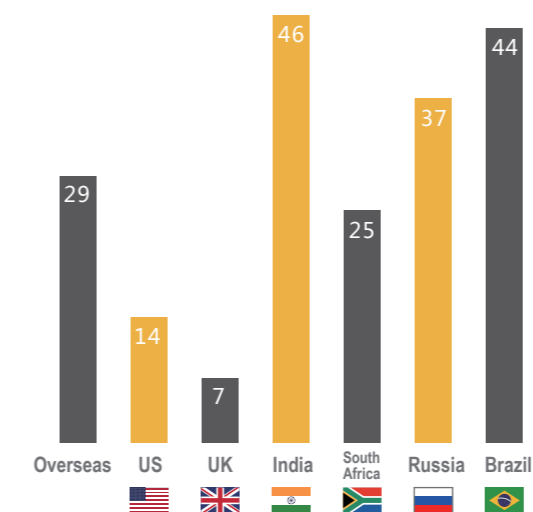
The survey shows that China's culture and science & technology is the area that the international respondents are most familiar with. Country-wise, more than 40% of Russian and Indian respondents say that they know about Chinese culture, and the proportion is also over 30% in Brazil. In the UK, the US and Russia, people are more familiar with China's culture than its science & technology, yet for India and Brazil, the situation is exactly the inverse. In South Africa, science & technology and culture are both the most familiar Chinese attributes to its people.

Figure 5
Familiarity with China in Science & Technology and Culture

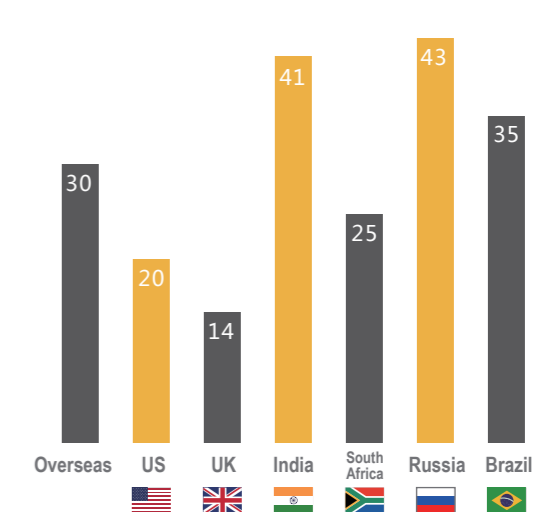
* The figure shows the percentage of respondents expressing a deep or considerable familiarity

Question
To what degree are you familiar with China in all aspects?

China's science and technology



Chinese culture



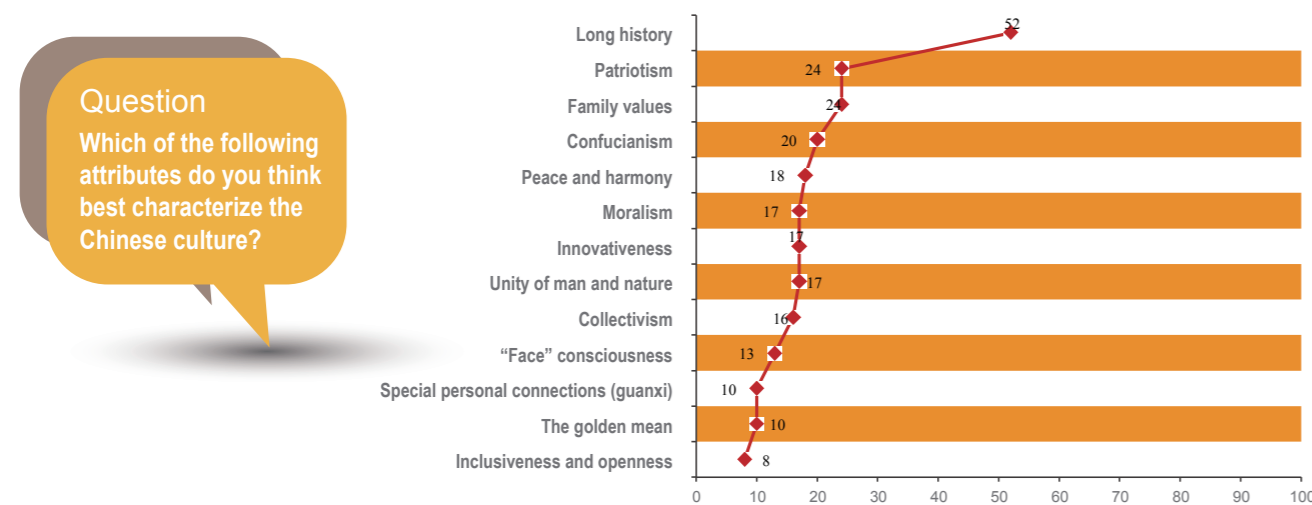
China has a longstanding cultural tradition. The Chinese culture is rich in form and appealing to the international audience.

Chinese culture is very attractive in the world. Sixty-one percent of the foreign respondents say they want to learn about the Chinese culture, and a third of them have expressed an interest in learning Mandarin. Travelling to China as tourists is an appealing cultural activity. Fifty-nine percent of the foreign respondents say that "getting to know about China's traditional culture" is the most important factor for them in visiting China as tourists.

China's "time-honoured history," which is widely seen as typical to the Chinese culture, is recognized by over half of the foreign respondents. "Patriotism" and "family values," with the recognition of 24% of the respondents, come second on the list. In the eyes of non-Chinese, the culture of China has preserved its innovative spirit, its emphasis on virtue and its collectivism; however, traditional perceptions about the Chinese, such as caring about "face" and "connections," seem to attract less attention from the international audience. International recognition is lowest about the perspective that spiritual belief and philosophy represent Chinese culture, and that the Chinese culture is open and inclusive.

Figure 6
Characteristics of Chinese Culture

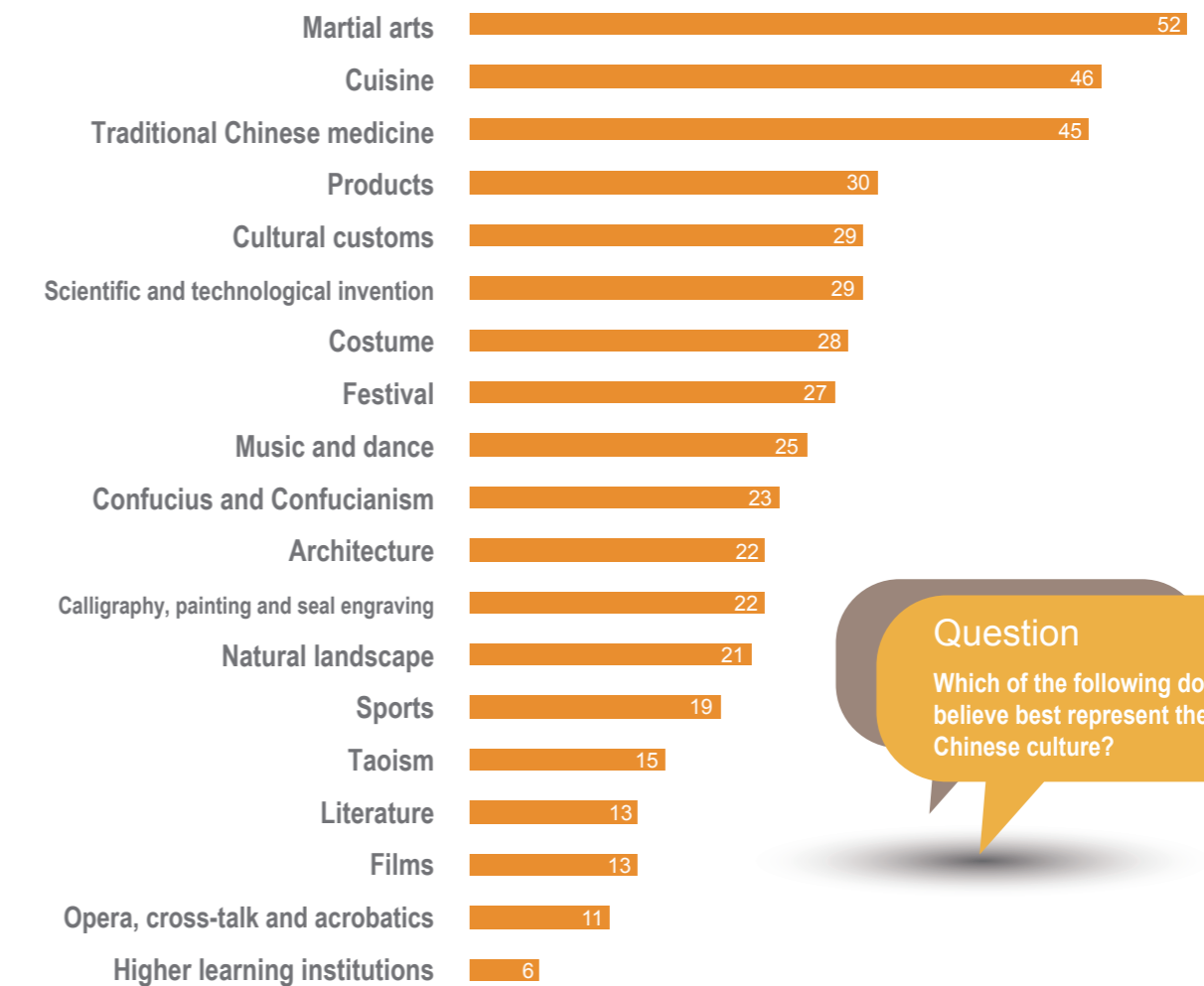
* Each coordinate point denotes the percentage of respondents agreeing with each statement on the left



Chinese culture is very diverse in forms. In the eyes of the international audience, the most representative aspects of Chinese culture include, in descending order: martial arts (52%), cuisine (46%) and traditional Chinese medicine (45%). The influence of higher learning institutions and mass media products is the weakest among all the surveyed forms of Chinese culture.

Figure 7
International Recognition of the Forms of Chinese Culture

* The figure shows the percentage of each individual cultural form

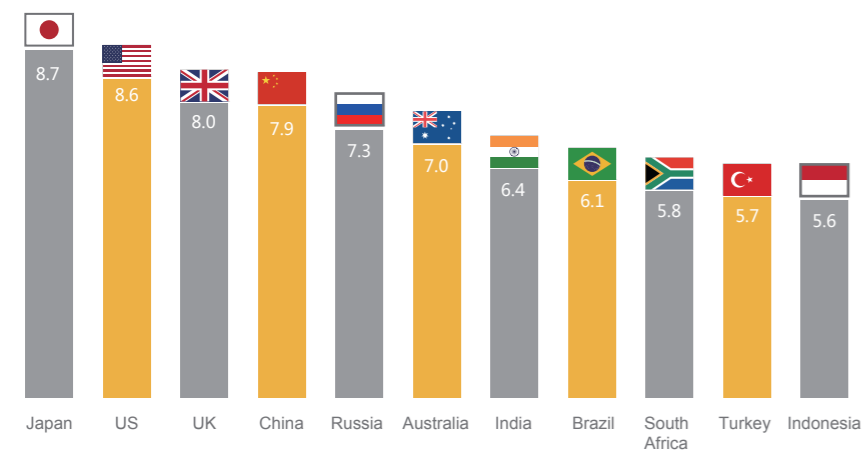


China is advanced in science and technology, strong in innovation.

The view of "China's advanced science and technology" is widely recognized in the world. On a scale of 1 to 10, the average score given by the respondents of the six countries for China's scientific and technological strengths is 7.92 points, ranking fourth in the 11 countries surveyed. There is only a negligible gap between China and the top three countries: 0.75 points behind the best performer Japan, 0.71 points behind second-place US, and only 0.04 points behind the third place UK. Meanwhile, China leads fifth-place Russia by 0.62 points and places 2.29 points ahead of the last on the list, Indonesia. The international recognition of China's science and technology capability is higher than the assessment of the Chinese themselves.

Figure 8
Overall Scores of China's Strength in Science and Technology

* The figure shows the average scores

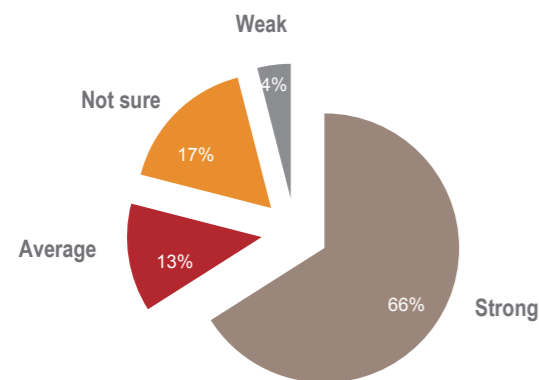


Question
How do you rate the following countries in terms of their strength in science and technology?

China's innovation capability is also well recognized in the world, with 66% of the respondents giving positive views about China's technological innovation and 34% believing China is quite strong in technological innovation.

Figure 9
China's Innovation Capability in Science and Technology

* The figure shows the percentages of respondents holding the respective views



Question
How do you rate China's innovation capability in science and technology?

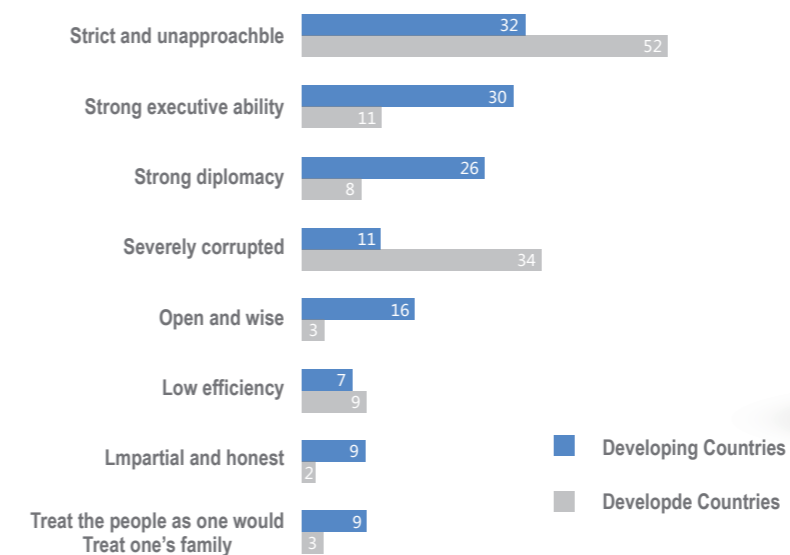
PART 4 CHINA'S IMAGE IN POLITICS AND ECONOMY

People in the world know little about China's politics, and there is a major divergence in the perceptions between developed and developing countries.

Generally speaking, people in the world lack understanding of China's politics—especially political concepts and propositions unique to the Chinese context—which is understood by less than half of the respondents. The perceptions of China's politics are highly divergent between developed and developing countries. There are more people in the developing countries that hold positive views about China's politics. Thirty percent of the respondents in the developing countries believe the Chinese government has strong governance capability and diplomatic skills, yet only 10% of the people in the developed countries think so. Ten percent of the people in the developing countries think corruption is a serious problem in China, while in the developed countries, the figure rises to 30%. Thirty percent of the people in the developing countries see the Chinese government as "stern-faced and unfriendly," a view that is shared by more than half of the respondents from developed countries.

Figure 10
Chinese Government

* The figure shows the percentages of respondents holding the respective views

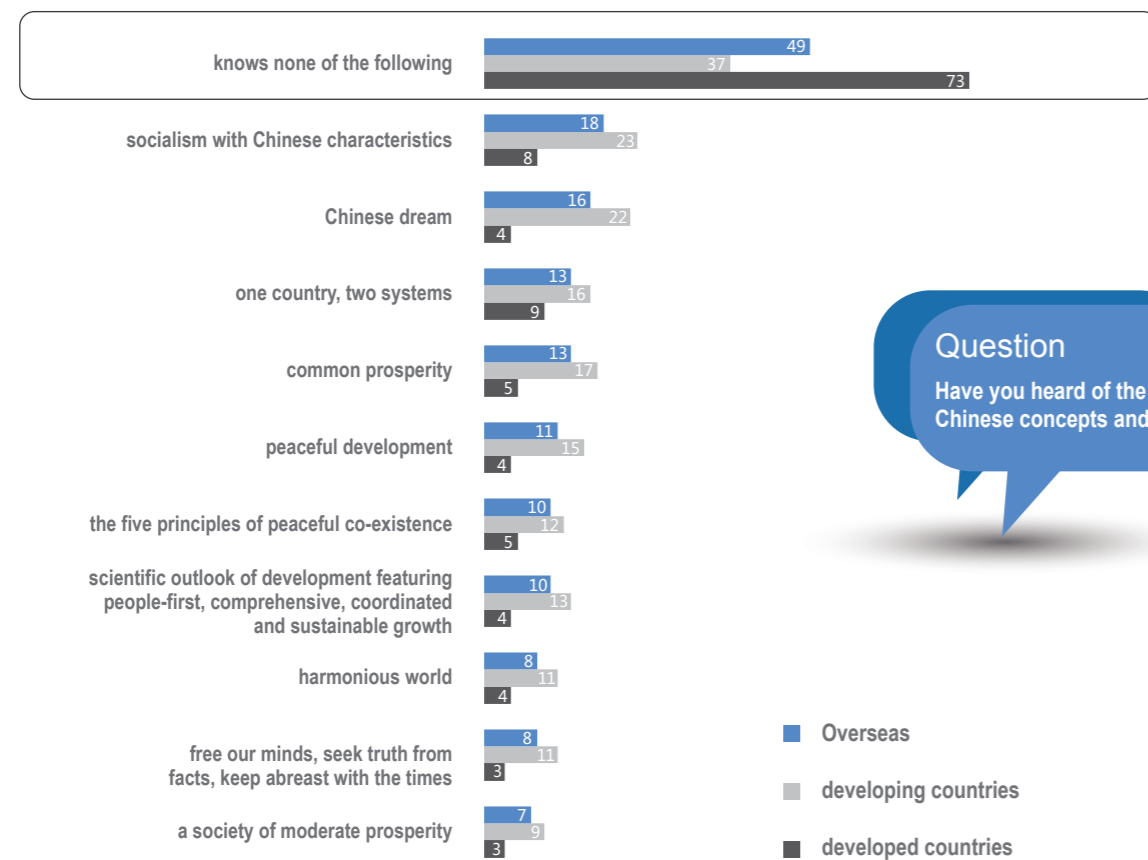


Question
How do you see Chinese government?

The governance approach and agenda of the Chinese government is less known to the people in the developed countries. In both the US and the UK, 73% of the population claim they have no knowledge of this. In the developing countries, the public knowledge of China's governance approach and agenda is relatively higher, with only 37% of the population saying they know nothing about it. Relatively speaking, concepts that are better known to the people in developed countries include one country, two systems (9%) and "socialism with Chinese characteristics" (8%). For developing countries, the best known concepts are "socialism with Chinese characteristics" (23%) and "Chinese dream" (22%). "Chinese dream" is also the most familiar concept for the people of Russia (31%) and India (26%).

Figure 11
Knowledge Of Uniquely Chinese Concepts and Propositions

* The figure shows the percentage of each concept



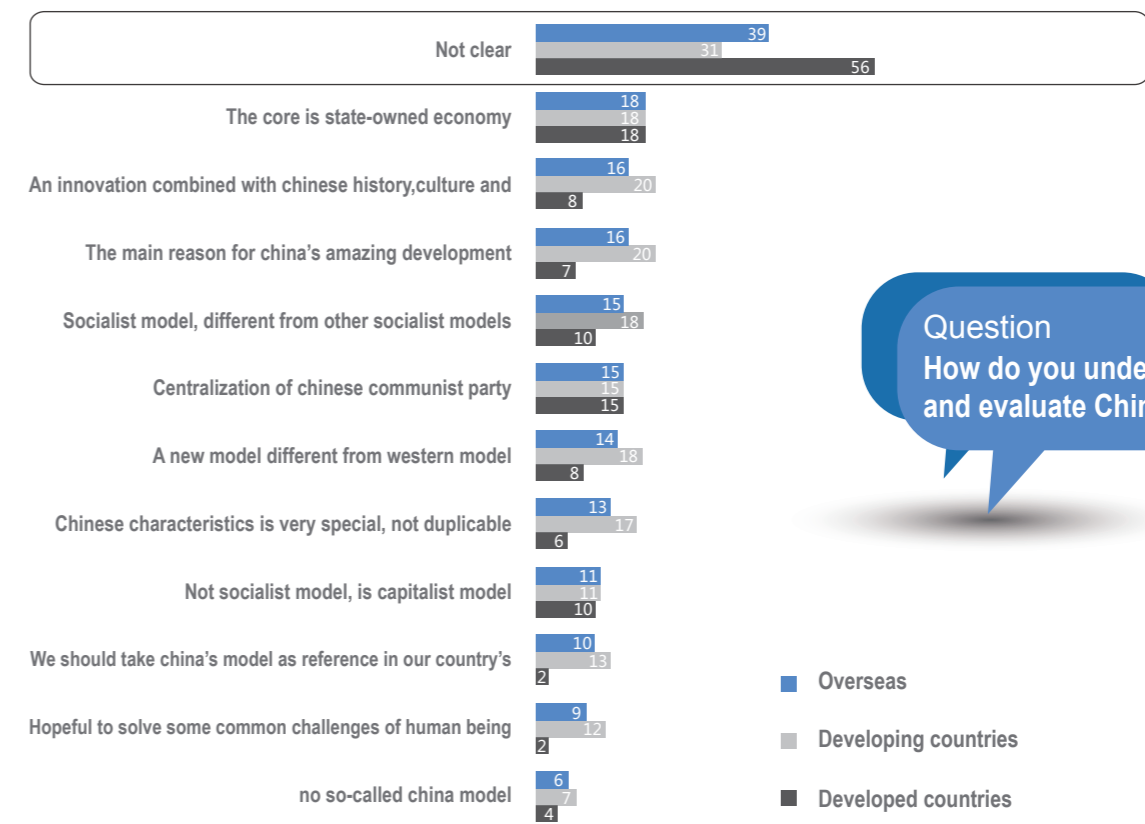
Question
Have you heard of the following Chinese concepts and propositions?

There lacks a common understanding of the China model.

Eighteen percent of the foreign respondents suggest that the dominant position of the state-owned sector in the economy is the essence of the China Model. Twenty percent of the people in the developing countries believe that the China Model is the main driver of the Chinese economic miracle and it is a form of innovation that connects China's history and culture with its contemporary national conditions. Fifteen percent of the people in the developed countries believe the China Model is about centralization. Ten percent of the foreign respondents believe their countries should learn from the China Model in their own governance and development, while 9% of respondents believe the China Model could help resolve some of the common challenges facing mankind, and only 6% of the respondents believe the China Model is non-existent.

Figure 12
Foreigners View on Chinese Model

* The figure shows the percentage of each concept



Question
How do you understand and evaluate Chinese model?

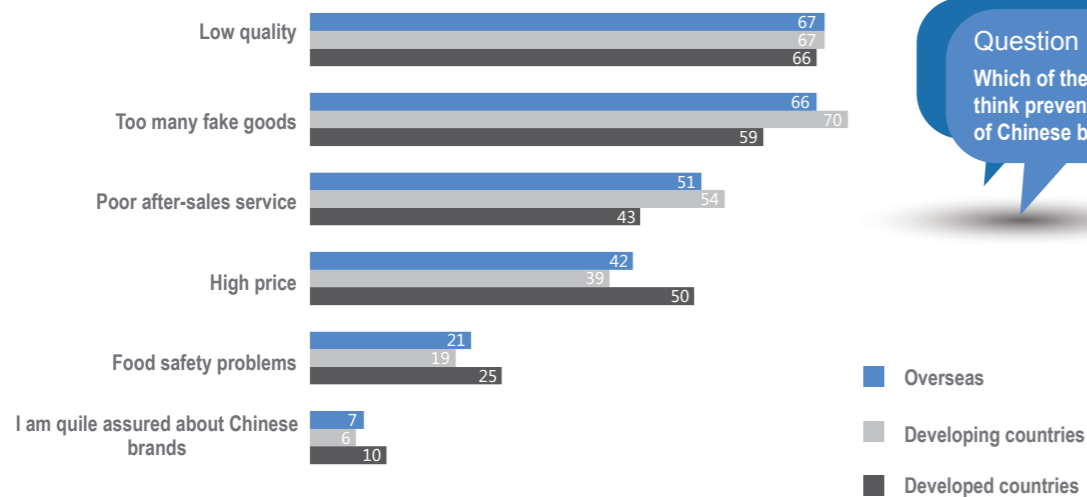
The Chinese economy is a boon to the global economy. The international influence of Chinese products and brands remains to be enhanced.

Thirty percent of the foreign respondents have certain knowledge about the Chinese economy. Sixty percent of them believe that China is able to join the ranks of major powers mainly because of its economic growth. Sixty-four percent of the foreign respondents see China's economic development as an opportunity for the global economy, and the people holding this view is as high as 72% of those from developing countries.

More than half of the overseas consumers accept Chinese products, 46% of them acknowledge the high-tech contents of made-in-China products, and 32% of them are confident in Chinese products. However, fifty-four percent of the overseas consumers believe Chinese products are of poor quality, and 70% of them think some of the products made in China could cause safety risks. Acceptance of Chinese products by overseas consumers is the highest in the following five categories: computer and IT products, home appliances, game consoles, retailers and apparel, all of which are accepted by more than 60% of the respondents.

Figure 13
Concern about Chinese Brands

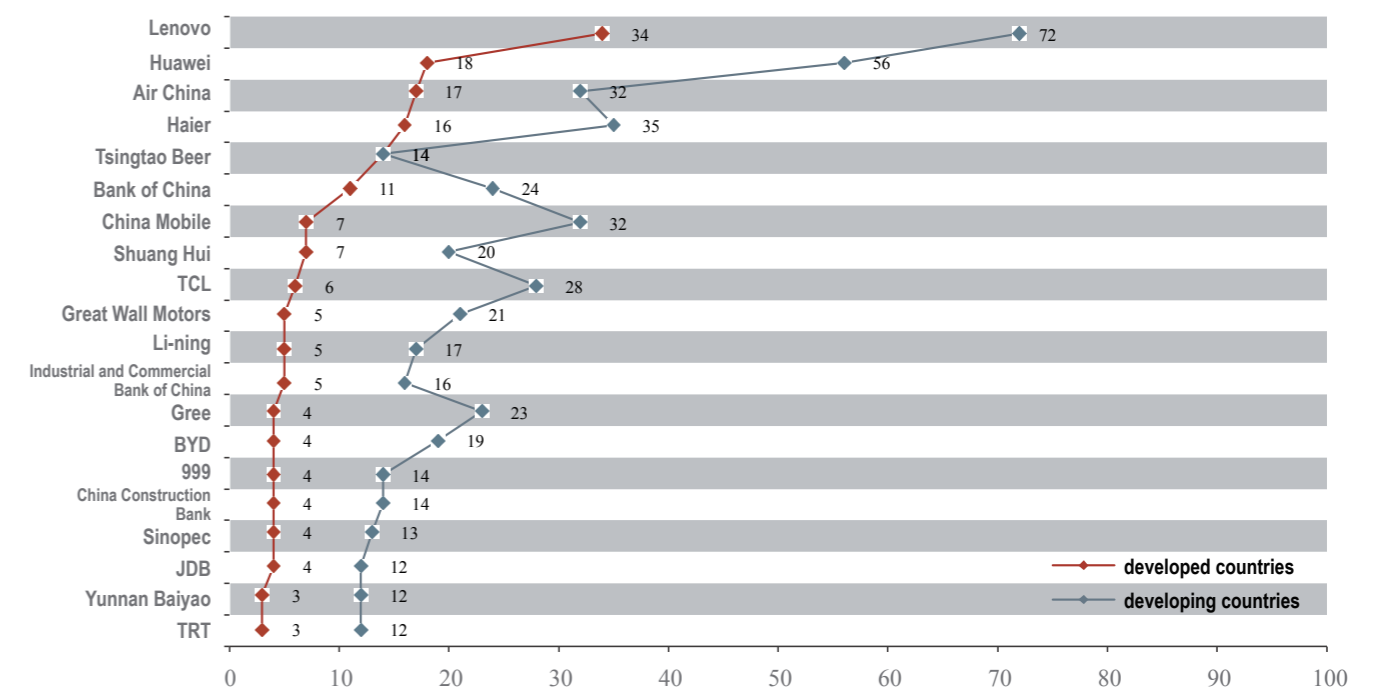
* The figure shows the percentage of respondents concerned about each statement on the left



In terms of familiarity, consumers in the developing countries know more about Chinese brands than those in the developed countries. On average, only 9% of the consumers in the developed countries are familiar with Chinese brands. The ten most well-known Chinese brands are: Lenovo, Huawei, Air China, Haier, Tsingtao Beer, Bank of China, China Mobile, Shuang Hui, TCL and Great Wall Motors. The average consumer familiarity with Chinese brands is 24% in the developing countries, and the ten most well-known Chinese brands are: Lenovo, Huawei, Haier, Air China, China Mobile, TCL, Bank of China, Gree, Great Wall Motors and Shuang Hui.

Figure 14
Visibility of Chinese brands

* The figure shows the percentage who chose very familiar or relatively familiar



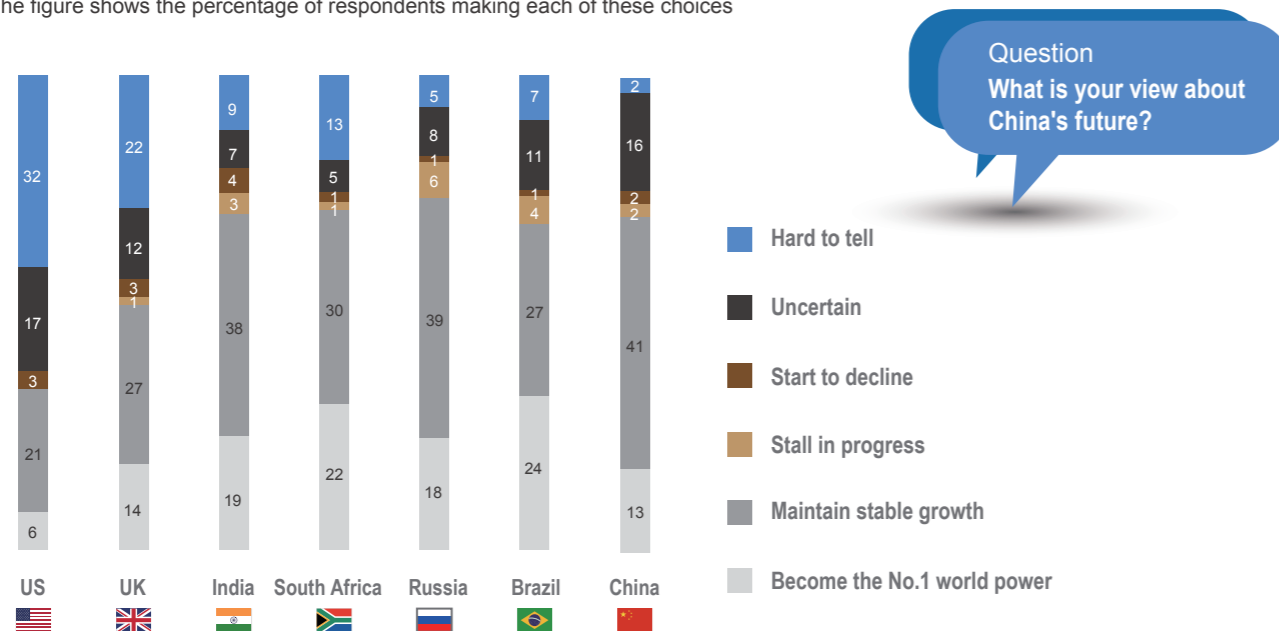
The world is confident about China's future. The economy is seen as the key factor in shaping its future.

The international community is generally optimistic about the future of China. Nearly half of the foreign respondents believe China will maintain stable growth and even become the No. 1 power in the world. Fifty-three percent of respondents recognize this view in the developing countries. Specifically speaking, 30% of the foreign respondents believe China could maintain stable growth, and the percentage holding this view is 40% in Russia and India. Seventeen percent of the foreign respondents believe China could become a first-class country in the world. There are more people with confidence in China's future in Brazil (24%), South Africa (22%), India (19%), Russia (18%) and the UK (14%) than the Chinese who hold this view (13%). The US is the only country that has a significantly different outlook on China's future (6%).

The statement that China will "stall in progress and start to decline" is gaining little support in the international community, but there are some people who suggest that the future of China is uncertain. This view is held by 17% of the population in the US, 16% in China, 12% in the UK and 11% in Brazil. There are notably more respondents who know little or are unsure about China's future in the developed countries, 32% in the US and 22% in the UK, and South Africa is the only developing country with a high percentage of 13%.

Figure 15
Views of China's Future

* The figure shows the percentage of respondents making each of these choices



It is a widely shared view among foreign respondents that high-speed growth and social stability are the two most crucial factors for China's future development

PART 5 SURVEY ANALYSIS

1. There is a big gap in the perceptions between Chinese and international respondents.

Foreign respondents are more optimistic than the Chinese about the prospect of China becoming the No. 1 world power. On the question of whether China is a world power or a regional power, more than half of the Chinese respondents believe China is a regional power and only 30% see China as a world power, yet the views of foreign respondents point to a totally inverse orientation.

2. There is a close correlation between the national interests of a country and its impression of China.

The survey shows that China's visibility and appeal are basically the same across countries and regions. However, there is a relatively wide disparity between developing and developed countries when it comes to the recognition and reputation of China. Generally speaking, public perception and recognition of China is relatively poor in developed countries and more positive in developing countries. China's relevance to its own national interests is the main cause of this perception gap.

3. The young people in foreign countries are more positive about China's image.

Our analysis shows that the younger groups tend to be more positive about China, which is the case in both developed and developing countries. All people in the age group of 18 to 24 years old think China is attractive, believe China could become the No. 1 world power, and plan to visit China. It is particularly worth noting that although the overall public image of China in the UK and the US is lower than in the developing countries, there are more people in the 18-24 age group of these two countries that are positive about China than in the developing countries. In the developing countries, the 18-34 age group is most familiar with China's culture and science & technology, the 45-54 age group knows best about the Chinese economy, and the 55-65 age group has the most knowledge of China's politics. In the case of developed countries, the Chinese economy is most familiar to people in the age of 25 to 34. The 18-24 age group knows best about China's culture and science & technology, and there are also twice as many people in this age group that are familiar with the Chinese media compared to other age groups.

4. China is a highly attractive tourism destination, and those who have visited China before are more positive about China.

According to the survey, 88% of the people in the world have never visited China before. Sixty percent of the foreign respondents expressed a desire to visit China. The percentage is the highest in India (83%) and South Africa (75%). Fifty-six percent of the foreign respondents say they are already planning to visit China as tourists. The most popular Chinese cities among international tourists include, in descending order, Beijing (67%), Shanghai (60%) and Tibet (40%). There is also a special tourism preference among the citizens of different countries: the Russians like Harbin, the Indians and Brazilians like Xinjiang, the South Africans like Guangzhou, the Britons like Xi'an and the Americans like Nanjing.

Foreign respondents who have visited China before are at least twice as informed as those who have not about China's culture, history, politics, diplomacy, military, science & technology and media. When asked to grade China's overall image, people who have visited China give an average score of 6.16 points, while the score given by those with no such experience is only 5.47 points. The proportion of respondents who believe China is a responsible and peace-loving country in international affairs and a country enjoying social stability is 10 percentage points higher for those with the experience of visiting China than those with no such experience.

5. China's national image is by and large the same as in previous years.

The survey describes China as a mysterious and amazing country and the Chinese people as "happy with their life, gentle, sensible and mysterious" in the eyes of foreigners. The number of people who see China as a big country with a long history, diverse culture and the ability to make technological innovation is more or less the same as in previous years. China's image of a major oriental civilization with a growing economy, social stability and picturesque landscape holds great appeal to foreign audience, so most of the foreign nationals are quite optimistic about China and willing to visit China. China's efforts to promote peaceful and common development in the world are well recognized, and China's image of a responsible big country is getting increasing acceptance. The people of the world can generally accept "made in China", but they have little knowledge of the Chinese politics, and there lacks a common understanding of the China model. To make China's image of a major socialist country known to the world remains a long and arduous task.

Compared to the 2012 survey, the creativity of the Chinese people is recognized by more foreign nationals this time. China's scores in national image, the image of the Chinese people and the image of Chinese products and brands are by and large the same as in previous years.

PART 6 INTRODUCTION TO THE PLATFORM OF CHINA'S NATIONAL IMAGE SURVEY

The platform of China's national image survey is jointly developed by the Center for International Communication Studies of China Foreign Language Publishing Administration, the Charhar Institute and Millward Brown, with the aim of gauging the opinions of the international community toward China through a scientific, objective, systemic and comprehensive survey, seeking the feedbacks of foreign nationals to the international communication campaigns on China's national image, and providing targeted, comparable and viable recommendations for boosting the effect of China's international communication activities. Since 2011, the platform of China national image survey has been conducting research on China's national image on a yearly basis and all the findings of the survey have been made public.

1. Special features of the platform



The platform builds on the synergy of official and non-governmental think-tanks in China, and the global survey is conducted by a world-renowned research agency consistent with international standards.

The survey covers all the major countries, economies and cultural regions in the world, and it has been conducted on a yearly basis since 2011.

It is the first survey platform in China that publishes major reports on China's national image, with extensive topics, reliable data and professional analysis.

Closely connected with the most pressing issues concerning the international image and communication of the Chinese people, Chinese culture, "made in China", Chinese brands and Chinese government.

The scholars and research agencies can apply to obtain its original data of the platform or to use the platform for conducting domestic and international surveys related to the research.

2. Content of survey

Basic topics:

- Global survey of national image: China's national image, the image of the Chinese people, China's politics, economy and culture, etc.
- Survey of the overseas image of Chinese brands: visibility and acceptance of Chinese brands overseas, etc.

Optional topics:

- Hitch-hiking surveys on the hot topics of the year.
- Commissioned surveys for scientific or marketing research purposes.

3. Methodology

The survey is conducted online, using Millward Brown's global sample base and in strict compliance with international standards. According to the needs of the clients, the survey can target specific age, gender and income groups based on the demographic pattern of the countries.

4. Institution involved

Center for International Communication Studies China Foreign Language Publishing Administration

www.chinacics.org

The Center for International Communication Studies of China Foreign Language Publishing Administration was established in 2004. It is a State-level professional think-tank specialized in the studies of international communication theories and China-related international news, with nearly 100 professional researchers and specially invited Chinese and foreign experts.

Main units: research office of communication strategy, general information research office, international media research office, translation research office, secretariat of Translators Association of China, research center for national image communication and evaluation, research center on the theory of "China threat", research center for the image of the Chinese Communist Party on international media, center for the surveillance and evaluation of China-related international news and research center for overseas publications and literatures.

Research features: The center is renowned for studies on application and recommendation purposes, and particularly competitive in the designing of global communication strategy and policy planning, assessment of international opinion, respondent survey and evaluation of communication effect. It provides professional policy advice and strategic research services for the central government, the business community, public service institutions and non-governmental organizations. Over the years, it has undertaken a number of major projects and key research programs funded by the National Social Science Foundation, including the "research on "China threat" in global media and countermeasures", the "studies on the designing of national image in international communication", the "strategic studies on enhancing the international communication capability in the new environment" and the "studies on China's national image and influence in Africa".

Core products: The center is a key member unit of the media opinion evaluation mechanism of the information and publicity departments of the central government. Based on its multilingual database of international media opinions covering over 8,000 media organizations, major think-tanks and public opinion research agencies in the world, the center produces more than 20 dynamic research products, including Publicity Studies and Guiding Information and China-related News on Overseas Media. It is also the editor of the book series "Studies of International Communication Theories and Practices" and the sponsor of several State-level professional journals such as International Communications, Internet Communication and Chinese Translators Journal.

Flagship activities: The center is the organizer of several high-end academic conferences, including the "national seminar on international communication theories", the "national workshop on translation and interpretation", the "seminar on the communication of China's political language" and the "international seminar on China dream", which have served as a platform for exchanges between the political, business and academic communities. It works with other Chinese and international professional agencies to build joint research bases and collaborative innovation centers. It publishes the "annual report of the global survey on China's national image" on a regular basis.

Charhar Institute

www.charhar.org.cn

The Charhar Institute is a non-official Chinese think-tank on foreign policy and international relations. It was founded in 2009 by Dr. Han Fangming, Vice Chairman of the CPPCC Foreign Affairs Committee. Following the principles of "forward-looking, influential and collaborative progress", it aims to become a non-official Chinese think-tank with global influence. The institute currently has a 9-member international advisory committee, 19 senior research fellows, 41 research fellows and 7 staff members.

Main research units: Research center for conflict and resolution, research center for city-to-city diplomacy and research center for peace in the Korean Peninsula.

Main service units: International advisory committee, editorial department of Public Diplomacy Journal and secretariat.

Research features: The research of the institute is focused on China's neighborhood policy and international relations. Using case studies, surveys and archives as the main research methods, it aims to provide forward-looking and innovative ideas on these topics and give a non-official voice from China in the international community.

Core products: Public Diplomacy Quarterly, Charhar News Bulletin, Charhar Report, Charhar Public Diplomacy Series, Charhar Foreign Policy and International Relations Series, etc.

Flagship activities: The Charhar Institute is the lead sponsor of the "Charhar Forum on Public Diplomacy", "International Forum on Public Diplomacy", "Charhar Roundtable" and "Charhar Dialogue", and supports the organization of several academic events such as the "national academic forum of doctoral students in international politics and international relations" and the "sub-session of Jeju Forum on international communication".

Millward Brown-ACSR

www.millwardbrown.cn

About Millward Brown

Millward Brown-ACSR is the joint venture of Millward Brown in China. Millward Brown is a leading global research agency specializing in advertising effectiveness, strategic communication, media and brand equity research. Millward Brown helps clients grow great brands through comprehensive research-based qualitative and quantitative solutions. Specialist global practices include Millward Brown Digital (a leader in digital effectiveness and intelligence), Firefly Millward Brown (our global qualitative network), a Neuroscience Practice (using neuroscience to optimize the value of traditional research techniques), and Millward Brown Optimor (a strategy consultancy helping companies maximize financial returns on brand and marketing investments). Millward Brown operates in more than 55 countries and is part of Kantar, WPP's data investment management division.