

USCHINA

PUBLIC PERCEPTIONS

OPINION SURVEY 2017



Hopes and Fears of
Americans & Chinese People
for U.S.-China Relations



About the Committee of 100

The Committee of 100 (C100) is a national non-partisan, non-profit membership organization comprised of prominent Chinese Americans in a broad range of professions. For over 25 years, the Committee has been committed to twin missions of promoting the full participation of Chinese Americans in all fields of American life, and encouraging constructive relations between the peoples of the United States and Greater China. C100 is a 501(c)(3) tax-exempt nonprofit, with headquarters in New York City, and regional chapters in Washington, D.C., Los Angeles, San Francisco, and Beijing.

www.Committee100.org



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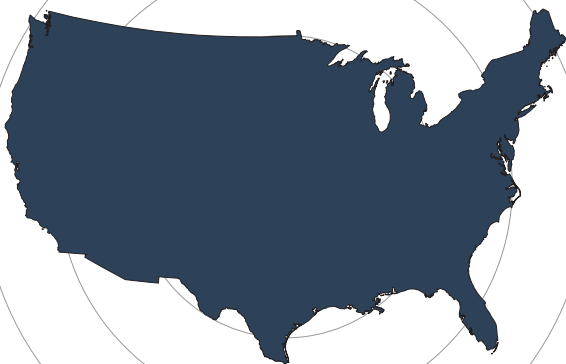


TABLE OF CONTENTS

4	ABOUT THIS SURVEY	
8	EXECUTIVE SUMMARY	
	I. OVERALL IMPRESSIONS	
14	Overall Impressions Highlights	
15	1.1 Do you think the U.S./ China is headed on the right track or wrong track?	39 3.3 Is America's government doing enough to prevent international cyber-hacking?
16	1.2 Is your impression of China / U.S. favorable or unfavorable?	40 3.4 Is China's government doing enough to prevent international cyber-hacking?
17	1.3 Does the American / Chinese public have a favorable or unfavorable impression of China /America?	41 3.5 What areas would the U.S. and China benefit from working together?
18	1.4 Is China / the U.S. a military threat?	42 3.6 How important is China in deterring nuclear proliferation in North Korea?
19	1.5 Is China an economic threat?	43 3.7 How important is U.S.-China cooperation in reducing tensions on the Korean peninsula?
20	1.6 Should China trust America? Should America trust China?	44 3.8 How much do you personally worry about climate change?
21	1.7 How can the U.S. improve trust between the U.S. and China?	45 3.9 How does America's government perform in handling environmental issues?
22	1.8 How can China improve trust between the U.S. and China?	46 3.10 How does China's government perform in handling environmental issues?
	II. GLOBAL LEADERSHIP AND INFLUENCE	47 3.11 What is your personal goal in life?
24	Global Leadership and Influence Highlights	IV. U.S.-CHINA GEOPOLITICS
25	2.1 Which country has a better international image?	50 U.S.-China Geopolitics Highlights
26	2.2 Who will be the world's leading superpower in 20 years?	51 4.1 What are the most likely sources of conflict between the U.S. and China in the near future?
27	2.3 Which country will have the most influence on the global economy over the next 20 years?	52 4.2 Who are the most important partners to the U.S. and China?
28	2.4 Who will have the most influence in the Asia-Pacific in 20 years?	54 4.3 How would you rate the U.S. government's handling of relations with China?
29	2.5 Has the influence of China in the world increased or decreased in the past decade?	55 4.4 How would you rate the Chinese government's handling of relations with the U.S.?
30	2.6 Has the influence of the U.S. in the world increased or decreased in the past decade?	56 4.5 Are U.S.-China relations improving or getting worse?
31	2.7 Will China's influence increase or decrease in the next 10 years?	57 4.6 Is the U.S. or China more responsible for deterioration in bilateral relations?
32	2.8 Will America's global influence increase or decrease under the Trump Administration?	58 4.7 Will U.S.-China relations improve or get worse under the Trump Administration?
33	2.9 What should China do to become a global superpower?	59 4.8 Is the U.S. trying to prevent China's rise?
	III. MUTUAL INTERESTS AND CONCERNS	60 4.9 How likely is military conflict between China & the U.S. in the next decade?
36	Mutual Interests and Concerns Highlights	61 4.10 Should America increase its military presence in Asia to counter China's growing military?
37	3.1 What are the most important issues facing your country?	62 4.11 How will U.S. political and military presence in the Asia Pacific affect the region's stability?
38	3.2 What are your greatest concerns about U.S.-China relations?	63 4.12 How familiar are you with territorial issues in the South China Sea?
		64 4.13 Is the South China Sea a regional issue or international issue?
		65 4.14 Should the U.S. intervene in Taiwan-China conflict?

V. ECONOMICS, TRADE, AND INVESTMENT

- 68** Economics, Trade, and Investment Highlights
- 69** 5.1 Is trade with China beneficial to the U.S. economy?
- 70** 5.2 Do products from China benefit American consumers?
- 71** 5.3 Have Chinese tainted food and unsafe toy cases reduced your confidence in products made in China?
- 72** 5.4 Does China cause job losses in the U.S.?
- 73** 5.5 Is U.S.-China trade beneficial or harmful to your country's people and economy?
- 74** 5.6 Should the U.S. Stop outsourcing to China, even if prices increase for U.S. Consumers?
- 75** 5.7 How concerned are you about intellectual property protection in China?
- 76** 5.8 What are your two greatest concerns about doing business with China?
- 77** 5.9 What are your two greatest concerns about doing business with the U.S.?
- 78** 5.10 What is the impact of U.S.-China investments on America and China?
- 79** 5.11 Is Chinese investment driven by desire for profit or influence?
- 80** 5.12 How much should the U.S. encourage Chinese investment in the U.S.?

VI. SOFT POWER DYNAMICS: CULTURE, MEDIA, AND EDUCATION

- 82** Soft Power Dynamics Highlights
- 83** 6.1 Have you ever watched a Chinese movie or tv show? Did seeing a Chinese movie or tv show improve your perceptions of the country?
- 83** 6.2 Have you ever watched an American movie or tv show? Did seeing an American movie or tv show improve your perceptions of the country?
- 84** 6.3 Have you ever seen a Chinese exhibit or attended a Chinese performance? Did that improve your perceptions of the country?
- 84** 6.4 Have you ever seen an American exhibit or attended an American performance? Did that improve your perceptions of the country?
- 85** 6.5 Have you ever visited mainland China / U.S.?
- 86** 6.6 Do you think Chinese / U.S. media portrays an accurate picture of the U.S. / China?
- 87** 6.7 Has Chinese / U.S. culture on the U.S. / China had a favorable or unfavorable impact?
- 88** 6.8 How do you feel about Chinese investment in Hollywood?

- 89** 6.9 Is teaching Chinese in schools a good or bad idea?
- 90** 6.10 Is an increase of Chinese students in the U.S. good or bad for America?
- 91** 6.11 Would you encourage studying abroad in the U.S. / China?
- 92** 6.12 What is causing the decline in American students studying abroad in China?
- 93** 6.13 Where do you get your China / U.S. News?

VII. DOMESTIC VIEWS

- 98** Domestic Views Highlights
- 99** 7.1 Do Chinese immigrants and Chinese Americans face discrimination at work in the U.S.?
- 100** 7.2 Do Chinese researchers, scientists and engineers in America pose a security risk to the U.S.?
- 101** 7.3 Does Congress / Chinese government officials have access to enough relevant information about China / U.S. And the state of U.S.-China relations?
- 102** 7.4 How useful is exchange with Chinese / U.S. officials?
- 103** 7.5 Will China's future generation be better off?

104 APPENDIX: METHODOLOGY

ABOUT THIS SURVEY

The Committee of 100’s Public Perceptions Opinion Survey project began in 1994 and produced reports in 2001, 2005, 2007, 2012, and 2017. The objective of these studies is to determine American attitudes toward China. Starting in 2007, the opinion surveys also measured, as a “mirror,” Chinese attitudes toward America on key issues in U.S.-China relations and salient domestic issues in both countries. The target respondent groups in both countries include the general public, and “influencers” comprised of business leaders, policy experts, and journalists.

These survey findings aim to provide unique, comprehensive, and comparative information that can be used to better understand and enhance U.S.-China relations. This report also allows for a comparison of attitude changes over the last decade in both the U.S. and China.

Methodology

For the 2017 study, the Committee of 100 collaborated with Brunswick Insights to conduct the English-language national survey in the United States. The data for the national China survey are drawn from Horizon Dataway’s own continuous self-sponsored and annually released survey on China’s global views, “The World in Chinese Eyes.” The latest survey covered 79 questions, 53 of which were asked in both the U.S. and China, 11 in the United States only, and 15 in China only. About 80% of the survey questions in this update were repeated from the 2012 survey. This year, the survey was conducted among 3,696 Chinese respondents and 1,019 American respondents between November 18 and January 9, 2017.

		Survey Methods	
	Country	United States	China
	Audience	General Public	General Public
	Sample Size	1,019	3,696
	Margin of Error	3.07%	1.47%
	Survey Timing	November 18 – December 20, 2016	December 6, 2016 – January 9, 2017
	Methodology	Telephone, administered using a computer-assisted telephone interviewing system (CATI)	Face-to Face household interviews

For the full methodology report, please see Appendix.

Survey Working Group Members



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Chairman, Committee of 100; Distinguished Professor and Former Chancellor, University of California Hastings College of Law

Frank H. Wu was elected in April 2016 as Chair of the

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Charlie Woo is the co-founder and CEO of Megatoys, an international toy manufacturing

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Nelson Dong is a partner at Dorsey & Whitney, LLP, as well as the Chair of the National Security Law practice and co-Chair of the Asia-Pacific

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Dr. Cheng Li is Director of the John L. Thornton China Center at Brookings Institution and a

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ABOUT THIS SURVEY



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Dr. Jeremy S. Wu was Project Director for LEHD in the Center for Economic Studies at the U.S. Census Bureau. An

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Executive Director,
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Holly Chang is Executive Director of the Committee of 100. Previously Ms. Chang spent a decade in China serving philanthropic groups as a U.S.-

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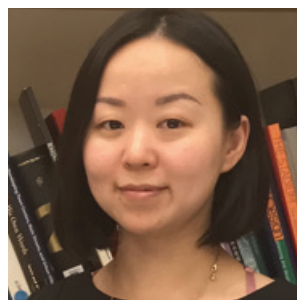


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Sharon Owyang was born in Singapore and graduated from Harvard University with a degree in Social Studies. Previous experience in research and policy

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Data Partners



Brunswick Insight provides the data and analysis that act as the strategic foundation of Brunswick Group, an advisory firm specializing in critical issues and corporate relations. Through opinion research, analytics, and open source intelligence, Brunswick Insight provides fast, reliable, and actionable decision support for corporate leaders navigating business critical moments. Brunswick Insight helps clients understand the voice of the stakeholder and align strategy and communications with the expectations they need to meet.



Dataway Horizon (formerly Horizon Research Consultancy Group) is a leading data intelligence firm in China, whose subsidiaries include DataLab, Public Affairs Division, Business Division and Future Business School. Dataway Horizon has a solid twenty-year track record in national data collection and analysis, working with governments, large enterprises, start-ups, and non-governmental organizations both domestically and internationally, to inform high-level economic, social, cultural development and policy-making decisions related to China.

EXECUTIVE SUMMARY

Forty-six years after the establishment of U.S.-China relations in 1971, the United States and China stand at a crossroads of strategic challenges and choices. The United States remains an established superpower; China's dynamic growth of the past forty years has made it an emerging global power. The relationship between the two countries, characterized by both cooperation and competition, has become the most consequential bilateral relationship of the 21st century. Yet the continued viability and affirmative direction of this relationship cannot be taken for granted.

At the outset of 2017, a new U.S. administration steps into power at a time when an optimistic China is increasingly confident of its international leadership status. Amidst security challenges, economic uncertainty, climate change, and domestic political pressures in both countries, bilateral relations are at a crucial inflection point. This is borne out by the Committee of 100 (C100)

Opinion Survey of 2017, which takes a comparative look at American and Chinese attitudes and opinions towards each other on important issues.

As in past years, this empirical report is based on C100's mirror surveys conducted by American and Chinese polling firms in 2007, 2012, and 2017. The data identifies some key themes, including declining mutual sentiment; converging interests; potential fears and concerns; an ascendant China sharing global leadership with the U.S.; and millennial optimism about U.S.-China relations.

These core themes are further laid out in the report's seven sections: Overall Impressions; Global Leadership and Influence; Mutual Interests and Concerns; U.S.-China Geopolitics; Economy, Trade and Investment; Soft Power Dynamics: Culture, Media and Education; and Domestic Views. Each section begins with thematic highlights that encapsulate key data findings.

I. U.S.-CHINA MUTUAL SENTIMENT DECLINED, BUT INTERESTS CONVERGING

Favorable Impressions in Both Countries Declined

Over the last decade, favorable impressions towards the other country have declined in both China and the United States. In 2017, fewer than half of the U.S. general public (48%) have a favorable impression of China, down from a high of 59% in 2005. 55% of Chinese have a favorable impression of the U.S. in 2017, though the positive impressions have also declined in the last decade, down from 60% in 2007.

Favorable impressions among business leaders in both countries, traditionally more inclined to be positive, have also

declined in 2017: 49% of American business leaders have a favorable impression of China, down from 62% in 2012, while positive impressions among Chinese business leaders declined from 94% in 2012 to 79% in 2017.

Chinese Less Trusting of America

In 2017, an overwhelming majority of Chinese (80%, up from 56% in 2012) think China should trust the U.S. a little or none at all. However, more Americans (54%) than in 2012 (49%) think the U.S. should trust China. This decline in trust from the Chinese may be linked to their views about American intentions to curb China's rise. In 2017, 61% of Chinese believe the U.S. is trying to prevent China from becoming a great power, up from 52% in 2012 and 45% in 2007. In contrast, around two thirds of Americans have consistently seen themselves as accepting China's rise and wanting a collaborative relationship.

Interests Converging in Jobs and Economy

In both countries, jobs and the economy top the list of domestic concerns. In the U.S., this is followed by political gridlock and campaign finance reform, health care insurance, and immigration. The Chinese's top concerns moved significantly away from corruption, the leading concern in 2012, towards economic and social issues like jobs and the economy, healthcare and insurance, aging and social security, and education.

Mutual Agreement on Areas of U.S.-China Collaboration

For the first time, Americans and Chinese are in agreement about the top three areas in which both countries would benefit from working together: trade, global financial stability, and the environment. In addition, North Korea has proved to be a common area of concern and desired collaboration.

TRADE: Over 80% of both Americans and Chinese agree that trade with China is beneficial to the U.S. economy. Both Americans (75%) and Chinese (74%) also agree that products from China benefit American consumers.

NORTH KOREA: Respondents in each country understand the need to collaborate on North Korea, and see the other country as central to reducing tensions on the Korean Peninsula.

ENVIRONMENT: 60% of Americans and 79% of Chinese (the highest percentage yet in the last decade) personally worry about climate change. Interestingly, a majority of Americans are critical about both the U.S. government (75%) and the Chinese government's (84%) handling of environmental issues; while most Chinese think both the U.S. government (62%) and Chinese government (56%) are doing a good job in handling environmental issues.

Shared Hopes: Both Sides Seeking a Happy Family

Also for the first time, Americans and Chinese share similar personal life goals, with having “a happy family” being the top goal for both countries. In China, the desire for a happy family surpassed the goal “to get rich”, which until 2017, had been the top life goal for Chinese, though the latter remains the top goal for Chinese millennials.

II. FEARS AND CONCERNS:

American Concerns on Military, Economic, and Cybersecurity Issues:

The majority of Americans perceive China's emerging military power (73%) and global economic power (63%) as potential to serious threats. The two greatest concerns Americans have about the U.S.-China relationship are the U.S. trade deficit and the loss of jobs to China. Historically, both concerns have been the top two choices in past surveys, though the numbers have lessened in 2017.

Americans are now also more worried about the cybersecurity threat, which has doubled in importance since 2012 from 11% to 24%, and which Americans cite as the top likely source of conflict between the two countries, along with trade. Most Americans do not think the American or Chinese governments are doing enough to prevent cyber-hacking.

Chinese Concerns about U.S. Military Presence in Asia and Containment of China:

As China assumes a leadership role on the world stage, concerns about containment and encirclement become more acute. 79% of Chinese see America's military power as a potential to serious threat. In regards to the U.S.-China relationship, Taiwan and the environment topped the list of concerns. The Chinese believe that Taiwan and U.S. military presence in the Asia Pacific region are the two most likely sources of conflict between the two countries.

Since 2012, China's territorial disputes with neighboring countries have emerged as the third most likely source of conflict for both Americans and Chinese. 50% of Chinese believe that the U.S. military presence in Asia will create tension among stakeholders rather than maintain the security of the region. A majority of Chinese (72%) see these disputes over claims in the South China Sea as a regional issue rather than an international one that the U.S. should be involved in. 50% of Chinese believe that a military conflict between the U.S. and China is likely in the next 10 years.

What Can Improve Trust?

When asked what the governments should do to improve trust between the countries, American influencers responded that the Chinese government should open communications and improve transparency; work to improve human rights,

freedoms and democratic processes; work out trade agreements and economic ties; and curb military expansion in the South China Sea. Chinese influencers responded that the U.S. government should enhance communications and know China better; strengthen cooperation and seek mutual benefits; be objective about China's rise; open up and develop trade; and not interfere in China's internal affairs.

III. CHINA'S ASCENDANCE, WHILE SHARING GLOBAL LEADERSHIP WITH THE U.S.

Chinese Optimism at All Time High

Chinese self-confidence and optimism about their country's trajectory is at an all time high in 2017. More Chinese than ever (92%) think China is headed on the right track, and most Chinese believe they will surpass the U.S. as the world's leading superpower. On the domestic front, the majority of respondents in China believe that the next generation will enjoy better housing, better air quality, safer foods and products, less corruption, better economic conditions, better career opportunities, and a more equal society.

Recognition of America's Continued Global Leadership

Despite overwhelming national confidence, China still accepts and recognizes America's continued strength as a global leader. 73% of the Chinese public feel that the influence of China in the world has increased in the last decade, but 66% also believe that the influence of the U.S. has either increased or stayed the same in the past 10 years. 59% of Chinese also feel that the influence of the U.S. in the world will increase or stay the same under the Trump administration.

IV. MILLENNIALS: HOPE AND OPTIMISM FOR U.S.-CHINA

Greater Trust and More Favorable Impressions Among Millennials

Millennials (18-34 yrs) in both countries have a more favorable impression than older generations of the other country. 57% of American millennials (compared to 48% of general public) have a favorable impression of China, while 60% of Chinese millennials (compared to 55% of the Chinese public) have a favorable impression of the U.S. Both countries' millennials are also more trusting of the other country: 62% of American millennials (54% of the American public) feel that the U.S. should trust China while 18% of Chinese millennials, (compared to 15% of the Chinese public), feel that China should trust the U.S.

American Millennials More Positive About China

While Chinese millennials hew more closely to the Chinese public views on most issues, American millennials are largely more positive about China than the American public on a number of issues:

- **China as Important Partner:** 72% of American millennials value China as the most important partner compared to 64% of the general public.
- **Perceive China as Less of a Threat:** 62% of American millennials perceive China as a military threat versus 73% of the general public; and 51% of millennials feel threatened by China's global economic power compared to 63% of the public.
- **Opposing Military Intervention:** As tensions rise in the Asia Pacific, 71% of American millennials oppose increasing U.S. military presence in Asia compared to 60% of the public.
- **Encouraging Chinese Investment in U.S.:** 72% of American millennials understand the benefits of trade and are more encouraging than the general public (54%) of Chinese investments in the U.S.; 67% are positive about Chinese investment in Hollywood, compared with 54% of the American public.

Greater Receptivity to U.S.-China Exchanges

Both countries' millennials are more receptive to cultural and educational exchanges than the general public: 81% of Americans are in favor of study abroad in China, compared to 73% of U.S. public, while 47% of Chinese millennials, compared to 42% of Chinese public are encouraging of study abroad in the U.S. 88% of American millennials think positively of the Chinese language being taught in U.S. schools (82% general public) and 86% (78% general public) think the increase of Chinese students studying in the U.S. is good for America. 62% of American millennials (58% of American public) think that Chinese culture has a favorable impact on the U.S., while 55% of Chinese millennials (51% Chinese public) believe that American culture has a favorable impact on China.

During this time of declining U.S.-China sentiments and decreased trust by the Chinese, there is reason for hope if leaders in both countries can actively expand dialogue, act on key areas of mutual interest, and empower the next generation to engage more deeply in U.S.-China relations.

RECOMMENDATIONS:

Following a positive first meeting on April 6-7, 2017 between U.S. President Donald Trump and Chinese President Xi Jinping, Committee of 100 applauds the formation of the new **U.S.-China Comprehensive Dialogue**, which will be overseen by the two presidents. The new U.S.-China Comprehensive Dialogue rests on four pillars requiring greater communication at the highest levels: 1. Diplomatic and Security Dialogue; 2. The Comprehensive Economic Dialogue; 3. The Law Enforcement and Cybersecurity Dialogue; 4. The Social and Cultural Issues Dialogue.

Within this important framework, C100 seeks to illuminate a few recommendations based on empirical results from this survey.

1. Diplomatic and Security Dialogue

Relevant Survey Highlights:

- Sentiment between the U.S. and China has been declining along with trust of Chinese towards the U.S.
- Americans continue to fear China as a growing military and economic threat to the U.S.
- Fear and declining trust from China is correlated with America's military presence in Asia, alongside rising tensions in the region
- While China is overwhelmingly optimistic about its own trajectory and leadership in the world, Chinese also continue to accept America's continued and growing global influence
- An overwhelming majority of Chinese and Americans believe in the importance of U.S.-China cooperation to achieve desired goals with North Korea

Recommendations:

- Increase the frequency of military-to-military communications, with the aim to articulate shared goals of reducing tensions and ensuring peace in the region, acknowledge concerns from each side, and minimize misinterpretations of the other's intentions.
- Expand and deepen joint strategic action around North Korea's nuclear program: With Pyongyang rapidly developing capabilities to strike the U.S. and its neighbors with nuclear missiles, both the American and Chinese government must continue to prioritize collaboration to effectively mitigate this threat.
- Leverage alternative back channels and private meetings to address conflict: In order to realize opportunities that create jobs and prosperity for both Americans and Chinese, officials on both sides are reminded to treat each other with utmost respect on the global stage, taking steps to avoid any public statements that could humiliate the leadership of either side.

2. Comprehensive Economic Dialogue

Relevant Survey Highlights:

- Americans and Chinese are in agreement for the first time on the top issues that the U.S. and China should collaborate on: Trade, Environment, and Global Financial Stability.
- Over 80% of both Americans and Chinese agree that trade with China is beneficial to the U.S. economy, and both sides overwhelmingly agree that products from China benefit American consumers.
- The majority of Americans believe that the U.S. should encourage Chinese investment in the U.S.
- The majority of Americans feel positive about Chinese investment in Hollywood's film industry

Recommendations:

- Host a U.S.-China High-Level Economic Summit, bringing together federal and state/provincial-level government and business leaders from both countries, chaired by Secretary and Premier level leadership. This pillar has the greatest potential for mutually beneficial outcomes for both countries. A high-level economic summit could serve to greatly amplify and broaden the impact of these opportunities.
- Encourage Reciprocal Trade and Investments: Recognize benefits of foreign investments in both countries; improve business operating environment for American and Chinese corporations and investments in both countries
- Open up film markets in both countries to provide mutual benefit: Ease quota on American films shown in China and encourage Chinese collaborations in Hollywood

3. Law Enforcement and Cybersecurity Dialogue

Relevant Survey Highlights:

- Cybersecurity has emerged as the third greatest concern for Americans about the U.S.-China relationship, doubling in importance since 2012
- A large majority of Americans feel that both the Chinese and U.S. government are not doing enough to prevent international cyber-hacking
- Nearly one-third of Americans feel that Chinese immigrants and Chinese Americans who work for the U.S. government and U.S. companies as researchers, scientists, and engineers pose a security risk to the U.S.

Recommendation:

- Initiate a Department of Justice (D.O.J.)- Ministry of Public Security (MPS) Exchange Program: broaden employee firsthand experiences with the peoples and culture in the other country, and enable them to learn from and be more sensitive to each other's cultures and systems

4. Social and Cultural Issues Dialogue

Relevant Survey Highlights:

- The majority of Americans and Chinese feel that the impact of the other's culture on their own country has been favorable
- 82% of Americans believe that an increase of Chinese students studying in the U.S. is good for America
- 78% of Americans believe that more Chinese language study in American schools is good for America
- 73% support the notion of their loved ones studying abroad in China
- The top reason cited for the decline in Americans studying abroad in China is due to scarcity of funds

Recommendations:

- Innovate creative public-private partnerships to strengthen national government Chinese language and exchange programs in the U.S.: Despite American openness to Chinese students, language and study abroad, there exists a major imbalance of Americans studying Chinese and studying abroad in China, when compared with the number of Chinese studying English and in the U.S.
- C100 recommends for government to focus on ways to catalyze the private sector to expand existing nationally-recognized government educational language and exchange programs. Incentives to attract support from private actors may include existing high-level activities (i.e. the U.S.-China State Dinner), to provide recognition at the highest levels of government from both countries.

Strengthen the Congressional U.S.-China Working Groups

Given the broad and strategic importance of China in America's foreign policy, C100 recommends for Congress members to actively elevate the capacity and impact of the bipartisan U.S.-China Working Groups in both the House and Senate. In addition to ensuring strong staff and member support for the working groups, we also encourage leveraging public-private partnerships to supplement and increase the quality and frequency of China-related briefings and educational efforts on the Hill.

Elevate, Empower, and Engage Longtime Bridge-Builders

In conclusion, the Committee of 100 recommends elevating and empowering existing long-time bridge-builders across diverse sectors, and engaging them in high-level policy discussions, including in each pillar of the **U.S.-China Comprehensive Dialogue**.

Given the fundamental differences between eastern and western values, China's rise as a global Asian power also manifests as an increasing source of tension and potential conflict within all historically western-led institutions, including those in the United States. The coming decades for U.S.-China relations will no doubt test the patience and challenge the imagination of all engaged. This is where the ambicultural upbringing in Chinese Americans and Americans with deep experiences in China can play a leading role to help effectively and peacefully navigate the extraordinary shifts that lie ahead.

I. OVERALL IMPRESSIONS

HIGHLIGHTS

Declining Sentiments

- Both countries' favorable impressions of each other have been declining over the last decade.
- Less than half of Americans across all groups have a favorable impression of China.
- The only exception is the subgroup of American millennials (Age 18-34), 57% of who have a favorable impression.
- Among "influencer" groups, American business leaders are just a little more positive about China, while policy experts and journalists are more negative than the general public.
- Chinese with favorable impressions of the U.S. dropped by 4% since 2012 to 55%. Chinese "influencer" groups across the board have a significantly more favorable impression of the U.S. than the Chinese public (business leaders - 79%, policy experts - 82%, and journalists - 84%).
- Consistent across previous C100 surveys, U.S. influencer groups in 2017 tend to underestimate the U.S. public's favorable view of China, while China's influencer groups tend to overestimate the Chinese public's favorable view of the U.S.

Trust and Lack Thereof

- 54% of Americans in 2017 think the U.S. should trust China some or a great deal (up from 49% in 2012).
- However, a significant majority of Chinese (80%) think that China should trust the U.S. a little or none at all (up from 56% in 2012). Chinese trust of the U.S. has dropped more than half since 2012, with 36% trusting the U.S. in 2012 and only 15% in 2017.
- Trust of each other in both countries decreases with age. American millennials (62%) are the most trusting out of all the groups in both countries.

How to Improve Mutual Trust

What U.S. Government should do:

- U.S. influencers focus on the need for America to open communications and improve transparency; work out trade agreements and economic ties; find compromise and cooperation; and promote more free flow of cultural and educational exchange between China and the U.S.
- Chinese influencers emphasize the need for the U.S. to enhance communications and know China better; strengthen cooperation and find mutual benefits; be objective about China's rise; open up and develop trade and economics; and not interfere in China's internal affairs.

What Chinese Government should do:

- For U.S. influencers, China's role in improving trust is to open communications, improve transparency; work to improve human rights, freedoms and democratic processes; work out trade agreements and economic ties; and curb military expansion in the South China Sea.
- Chinese influencers feel that China should promote stable economic growth; enhance communication and dialogue at the senior levels of government; enhance trade and economic cooperation; and strengthen state military power.

View on National Direction

- In 2017, more Chinese than ever (92%, up from 74% in 2012 and 88% in 2007) think China is headed on the right track, whereas only around a third of Americans in the last decade have consistently thought the U.S. was headed on the right track.

View on Military Power

- 73% of the U.S. public (compared to 62% of U.S. millennials) sees China's emergence as a military power as a potential to serious threat, while 79% of the Chinese public (and 81% of Chinese millennials) view American military power in the same way.

View on China's Economic Power

- 63% of the U.S. public, compared with only 51% of American millennials, and 70% of the Chinese public, compared with 72% of Chinese millennials, view China's emergence as a global economic power as a potential to serious threat to the U.S.

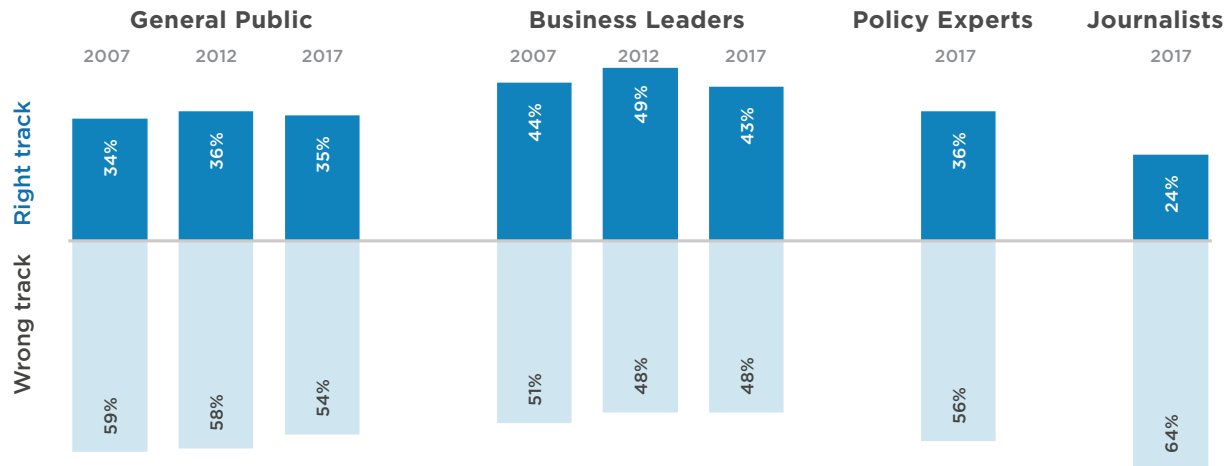
Note: Complete datasets and additional analyses available at Committee100.org

1.1 DO YOU THINK THE U.S./ CHINA IS HEADED ON THE RIGHT TRACK OR WRONG TRACK?



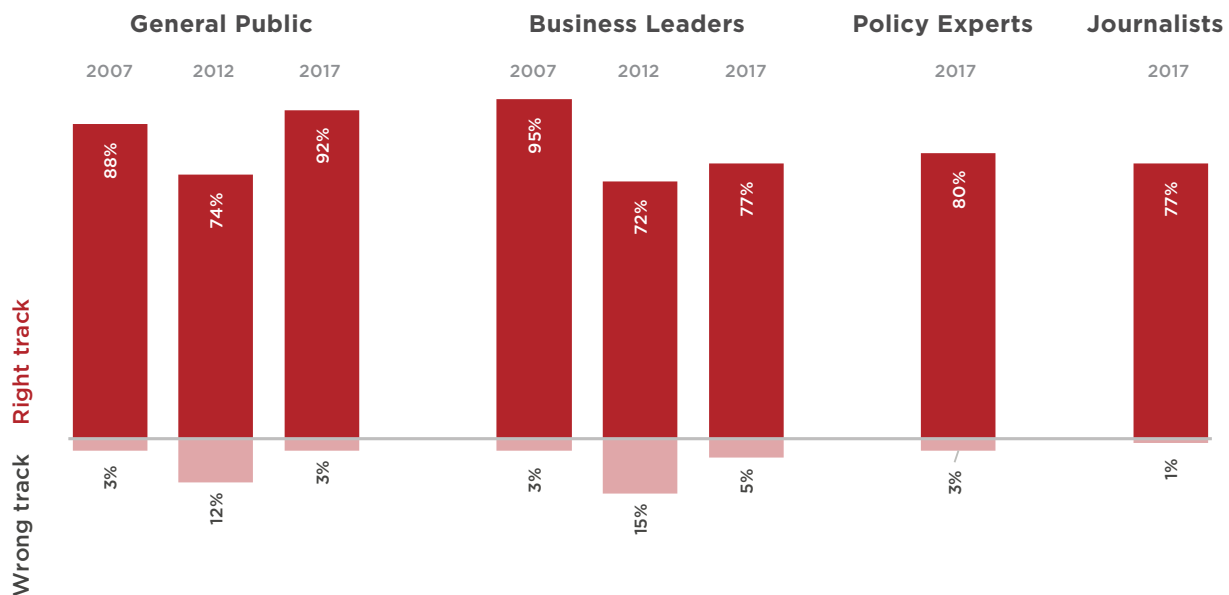
U.S. QUESTION:

Overall, do you think that the U.S. is headed on the right track or are things on the wrong track?



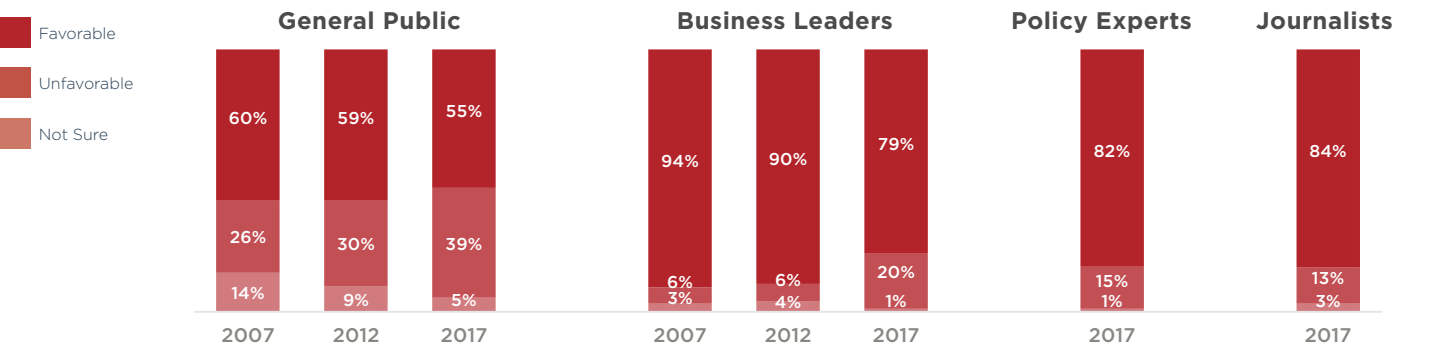
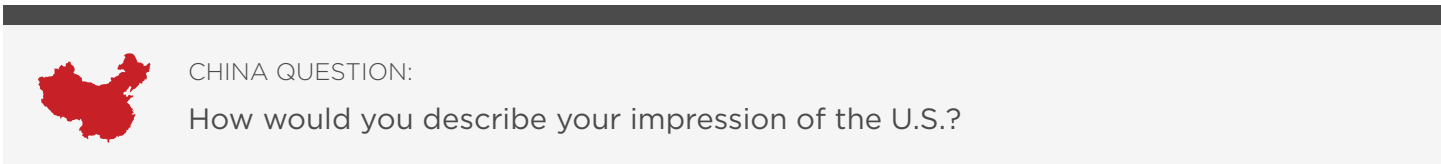
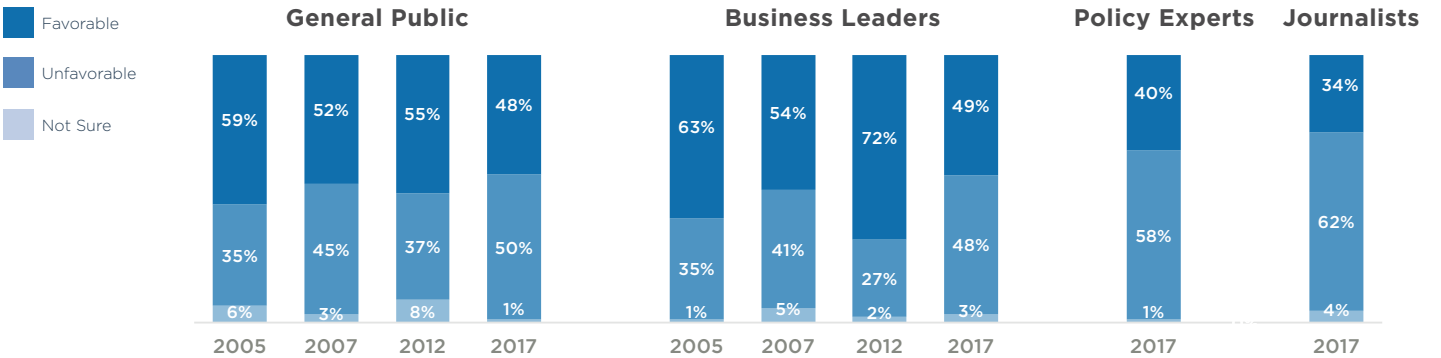
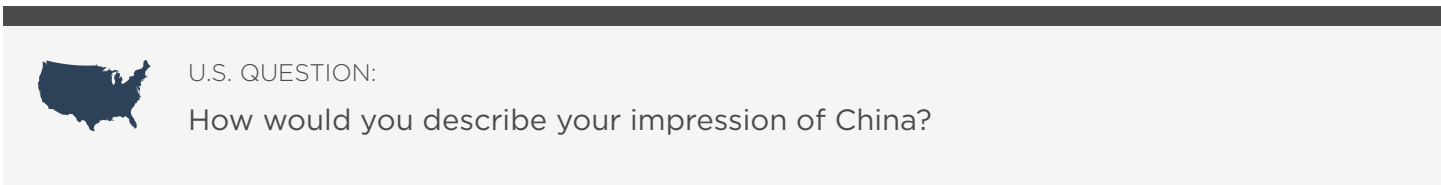
CHINA QUESTION:

Overall, do you think that China is headed on the right track or are things on the wrong track?

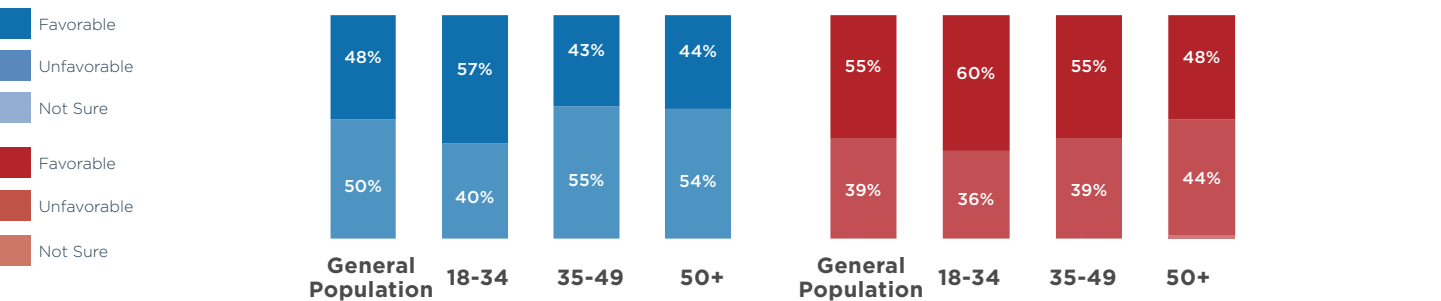


I. OVERALL IMPRESSIONS

1.2 IS YOUR IMPRESSION OF CHINA / U.S. FAVORABLE OR UNFAVORABLE?



2017 GENERAL PUBLIC AGE BREAKDOWN

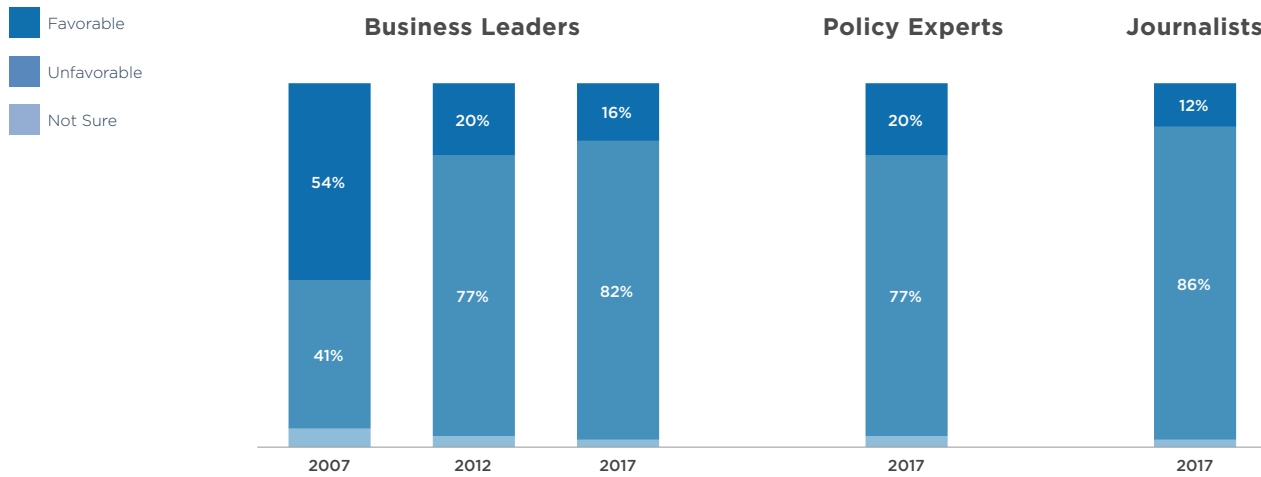


1.3 DOES THE AMERICAN / CHINESE PUBLIC HAVE A FAVORABLE OR UNFAVORABLE IMPRESSION OF CHINA / AMERICA?



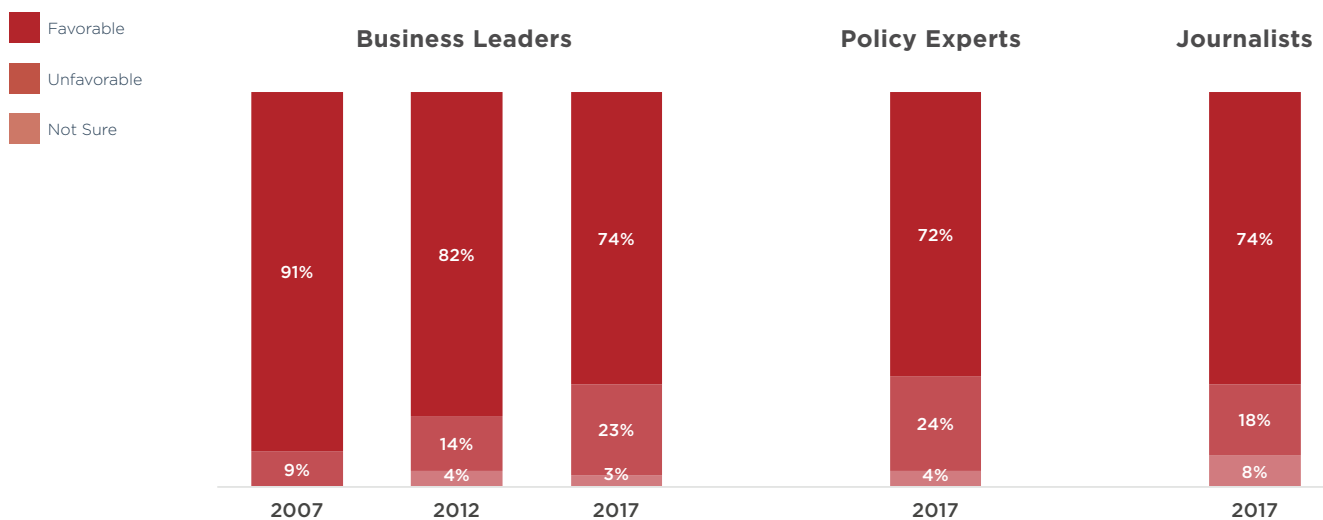
U.S. QUESTION:

How would you describe the American public's impression of China?




CHINA QUESTION:

How would you describe the Chinese public's impression of the U.S.?

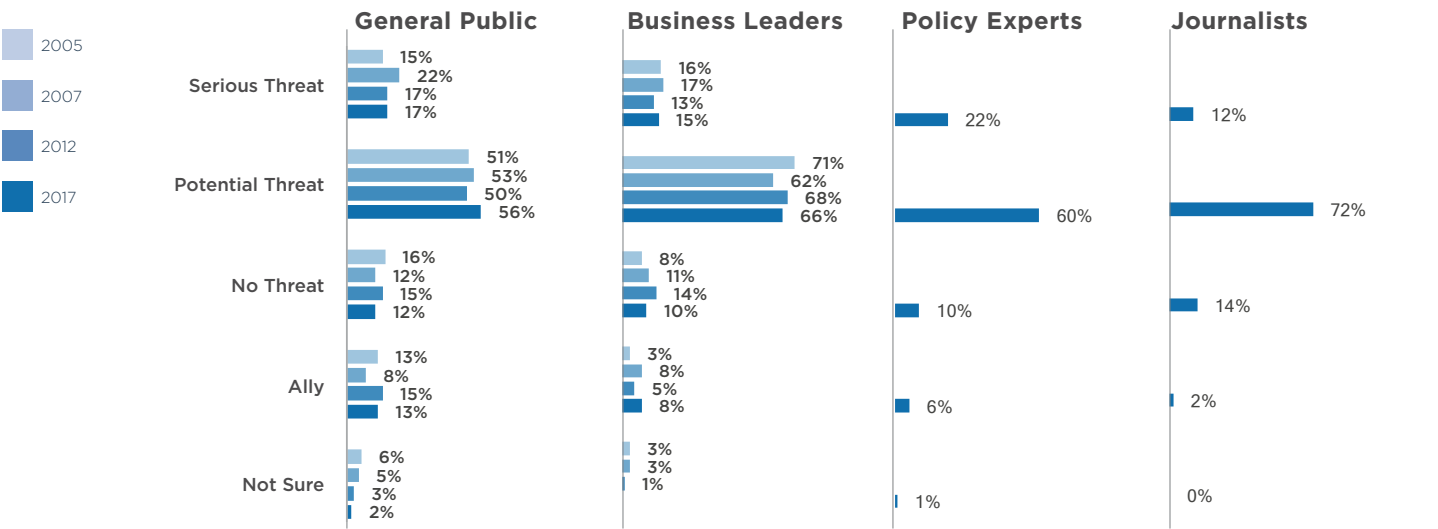



1.4 IS CHINA / THE U.S. A MILITARY THREAT?



U.S. QUESTION:

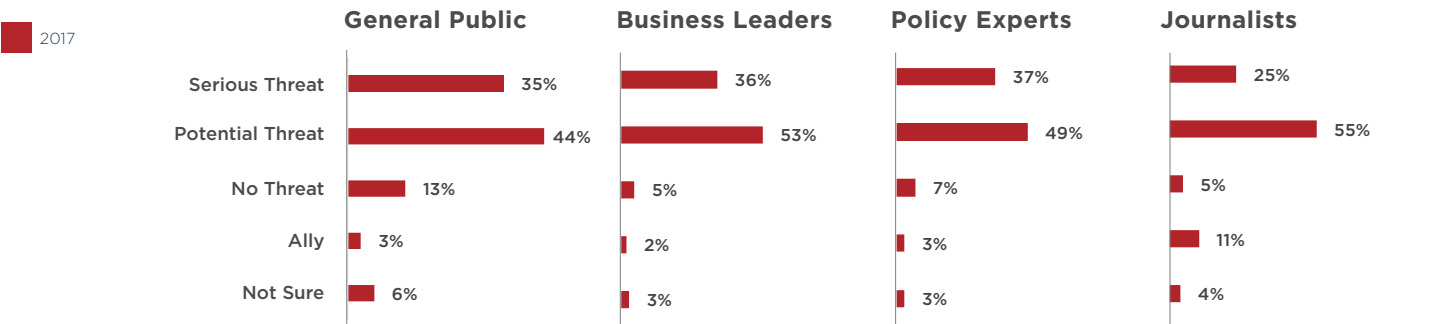
How do you view China's emergence as a military power – as a serious threat to the U.S., a potential threat, no threat, or as an ally of the U.S.?



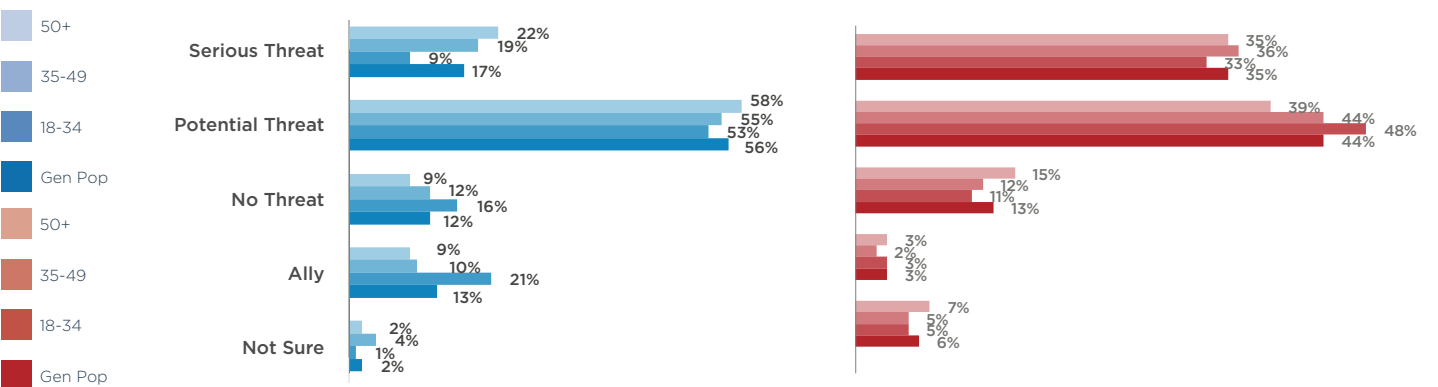


CHINA QUESTION:

How do you view America's military power – as a serious threat to China, a potential threat, no threat, or an ally of China?



2017 GENERAL PUBLIC AGE BREAKDOWN

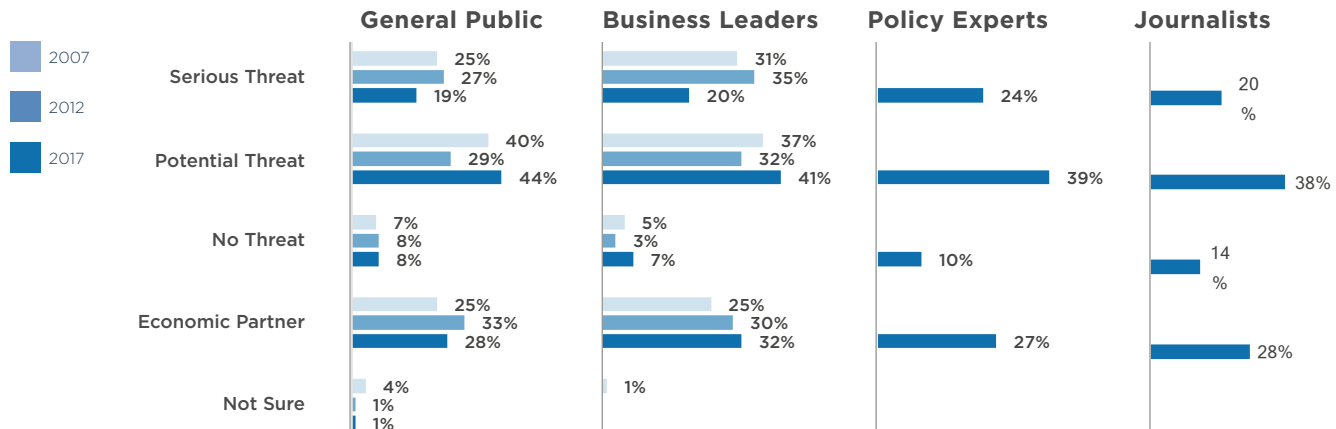


1.5 IS CHINA AN ECONOMIC THREAT?



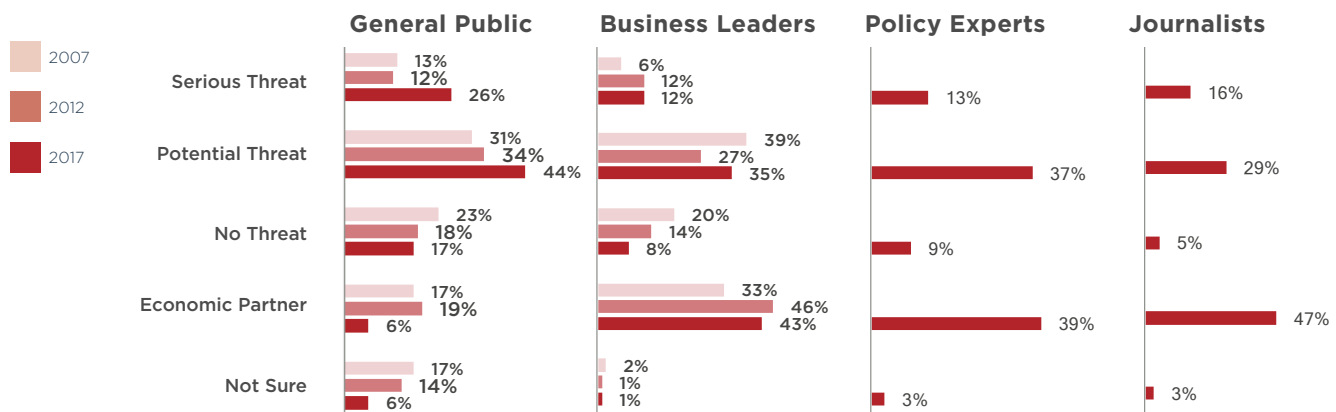
U.S. QUESTION:

How do you view China's emergence as a global economic power – as a serious threat to the U.S., a potential threat, no threat, or as an economic partner of the U.S.?

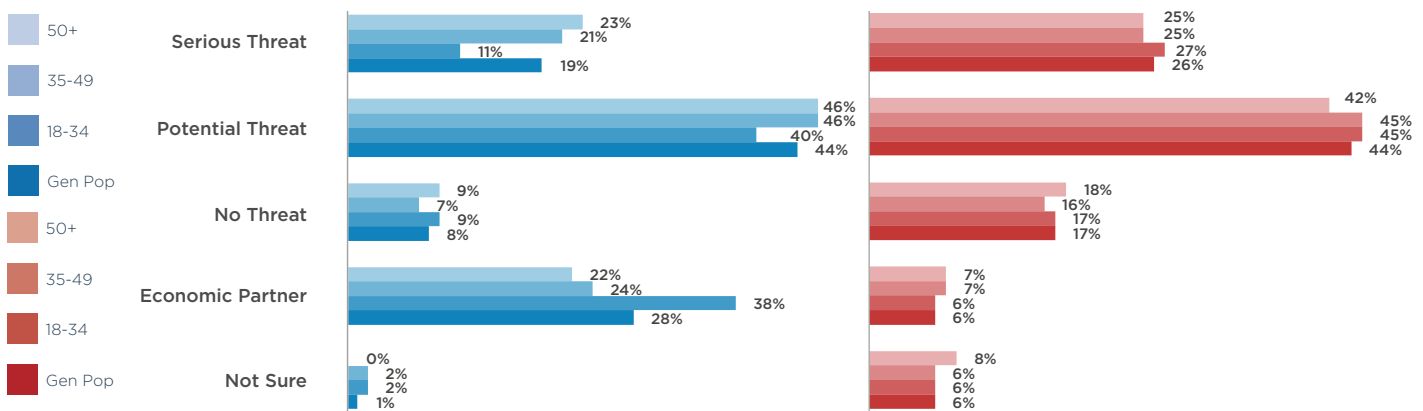


CHINA QUESTION:

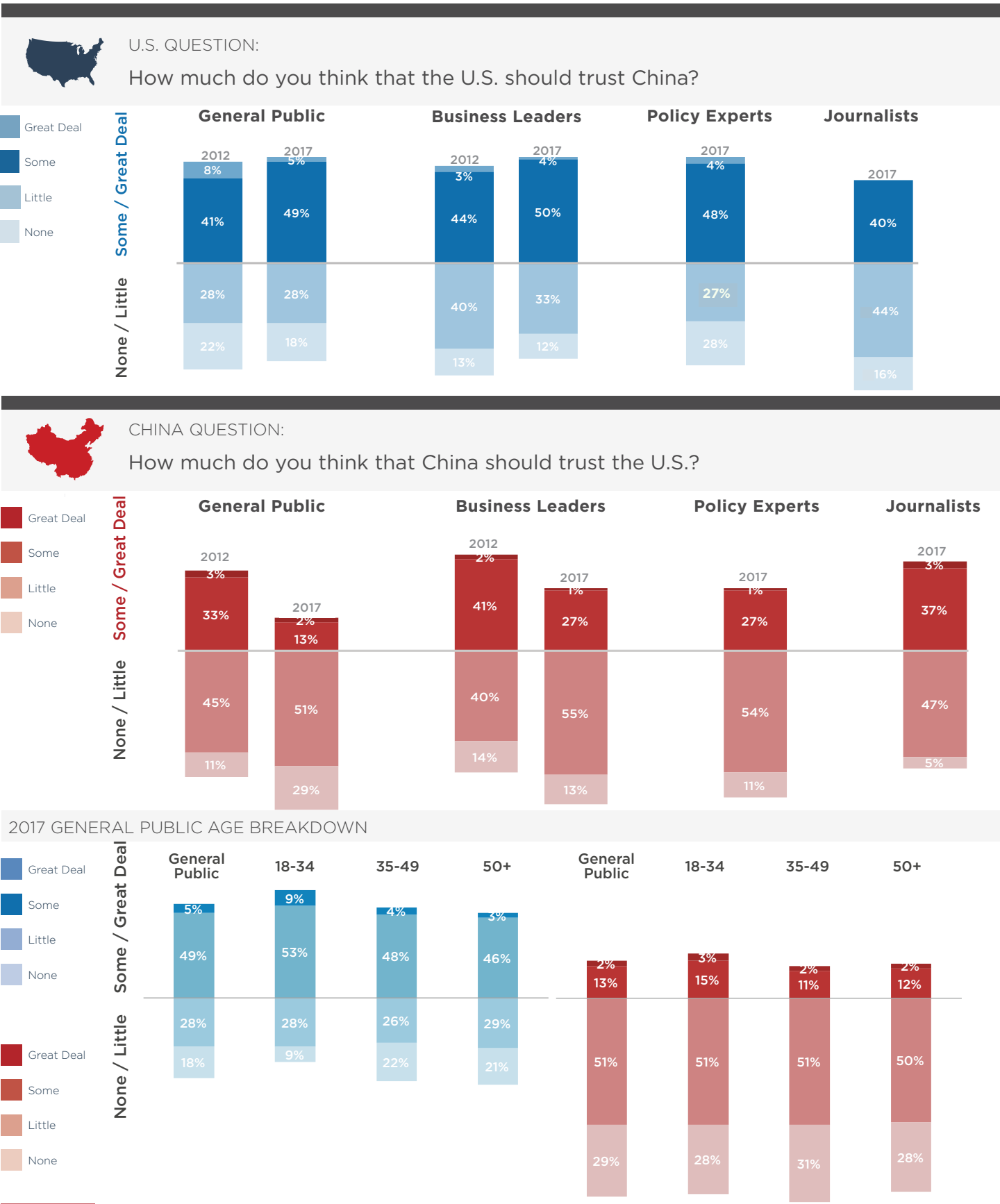
How do you view China's emergence as a global economic power – as a serious threat to the U.S., a potential threat, no threat, or as an economic partner of the U.S.?



2017 GENERAL PUBLIC AGE BREAKDOWN



1.6 SHOULD CHINA TRUST AMERICA? SHOULD AMERICA TRUST CHINA?

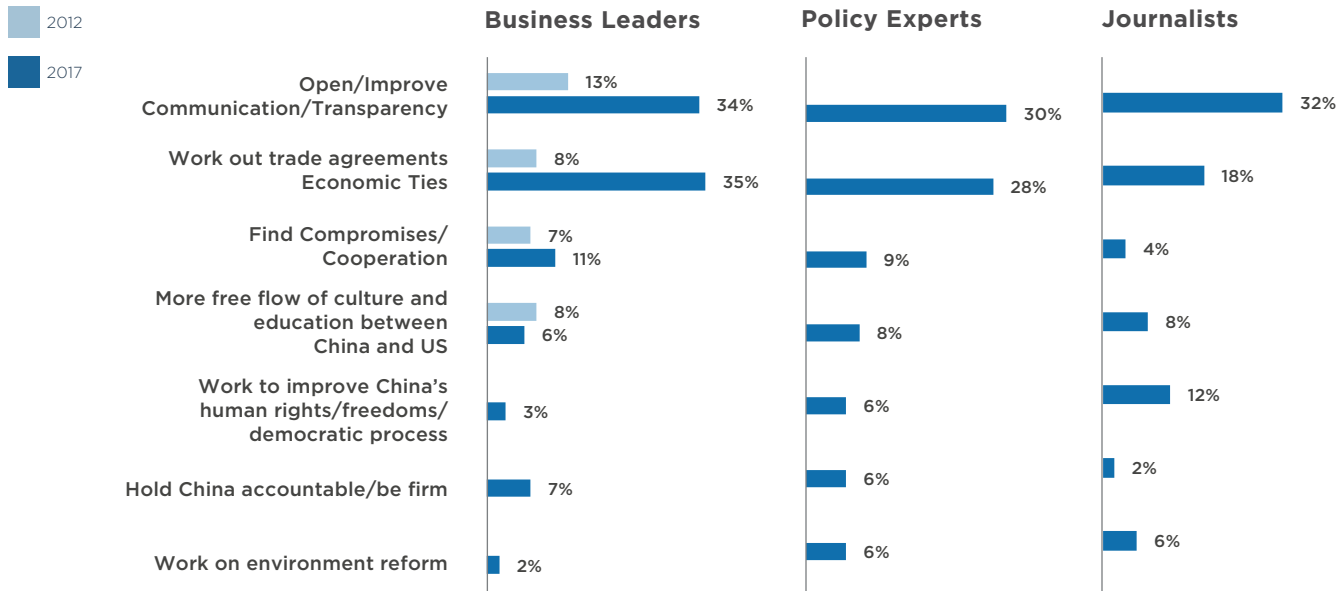


1.7 HOW CAN THE U.S. IMPROVE TRUST BETWEEN THE U.S. AND CHINA?



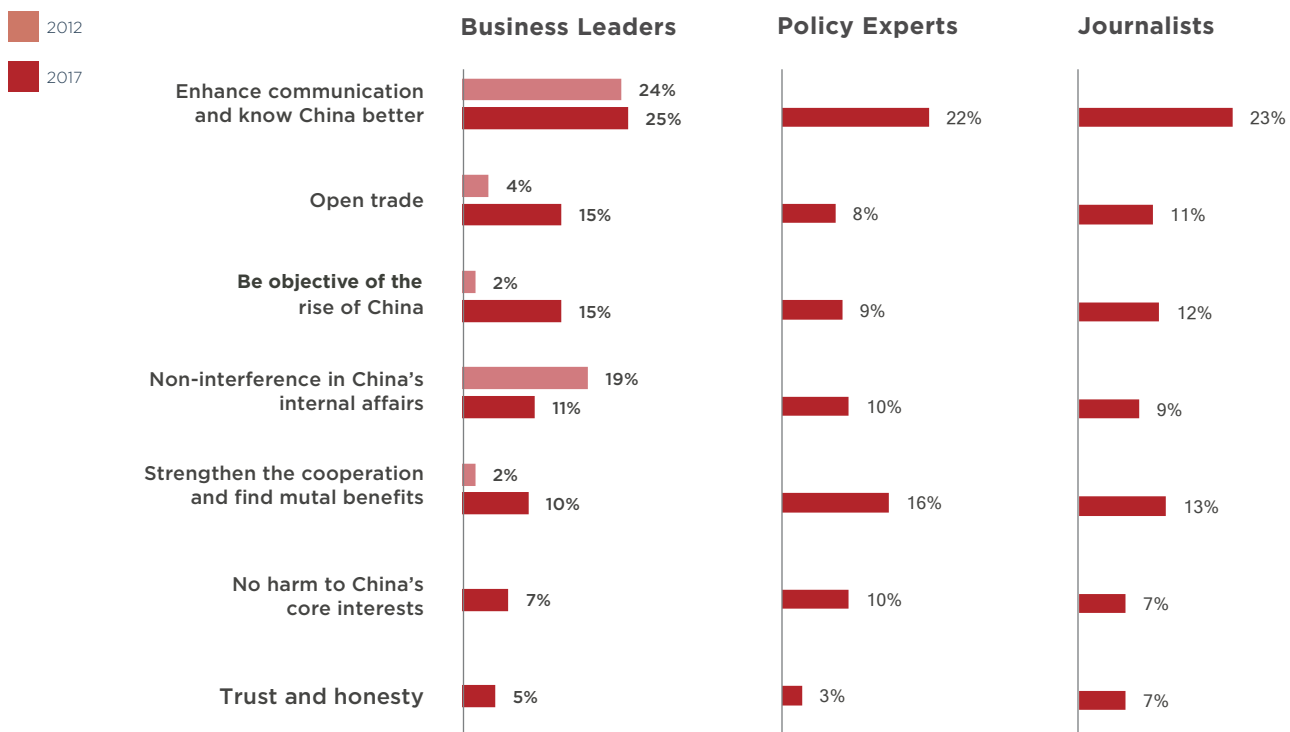
U.S. QUESTION:

What should the U.S. do to improve trust between the countries?



CHINA QUESTION:

What should the U.S. do to improve trust between the countries?

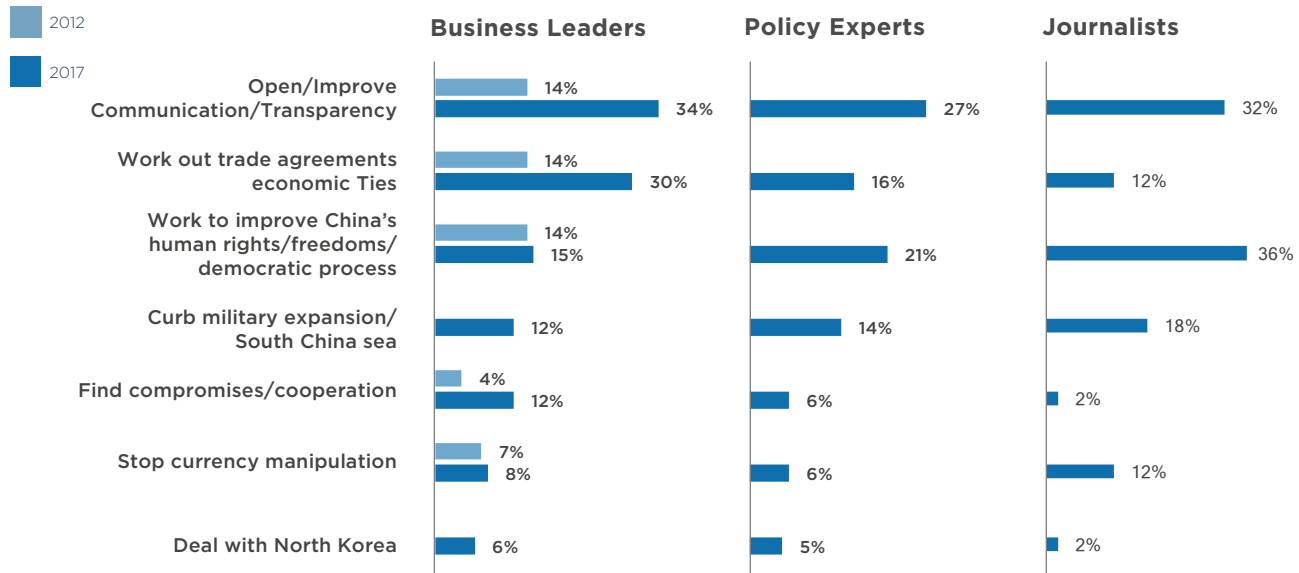


1.8 HOW CAN CHINA IMPROVE TRUST BETWEEN THE U.S. AND CHINA?



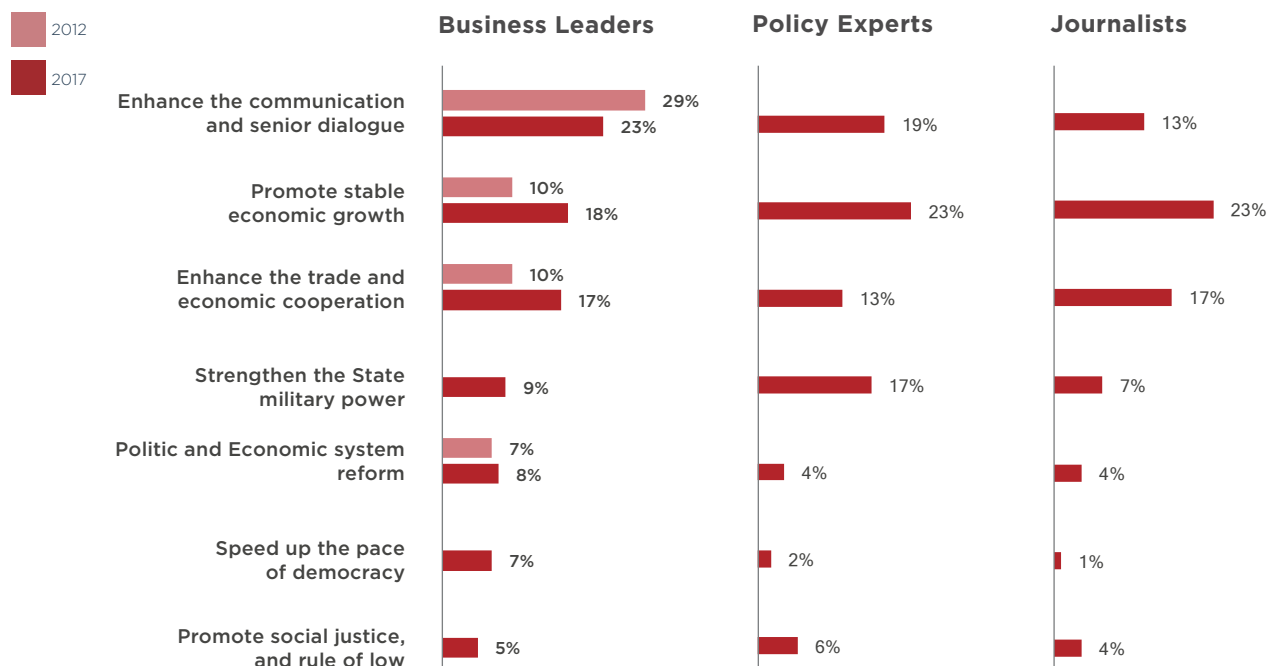
U.S. QUESTION:

What should China do to improve trust between the countries?



CHINA QUESTION:

What should China do to improve trust between the countries?



II. GLOBAL LEADERSHIP AND INFLUENCE

HIGHLIGHTS

Shared Global Influence

- Just under three quarters of the Chinese public thinks that the influence of China in the world has increased in the last decade and will only increase in the next decade as well.
- However, the Chinese do not see the U.S. as having diminished influence, as 63% of Chinese think that U.S. influence in the last decade has increased or stayed the same, up from 39% in 2012.
- 59% of the Chinese public also thinks that U.S. influence worldwide will increase or stay the same under the Trump administration.
- 60% of the American public and 71% of the Chinese public expect China to have the greatest influence in the Asia Pacific region twenty years from now.

U.S. as Future Global Superpower

- Despite China's rise, 55% of the American public (up from 46% in 2012) thinks that the U.S. will remain the world's leading superpower twenty years from now, while 60% of the Chinese public believes that China will take the lead.

Influence in Global Economy

- In 2017, 51% of the American public (up from 41% in 2012) thinks the U.S. will have the most influence over the global economy in the next 20 years, while 46% (down from 56% in 2012) thinks China will be the most influential. 68% of Chinese (up from 66% in 2012) think that China will have the most influence, with 27% (up from 19% in 2012) favoring the U.S.

China as Future Global Superpower

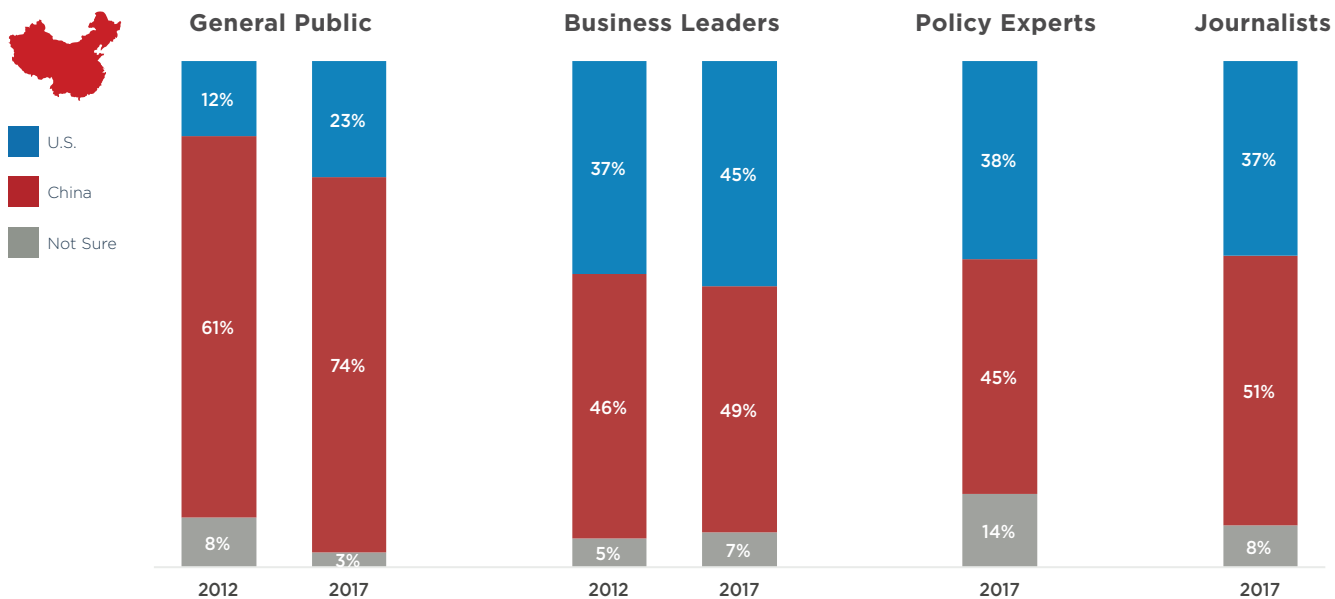
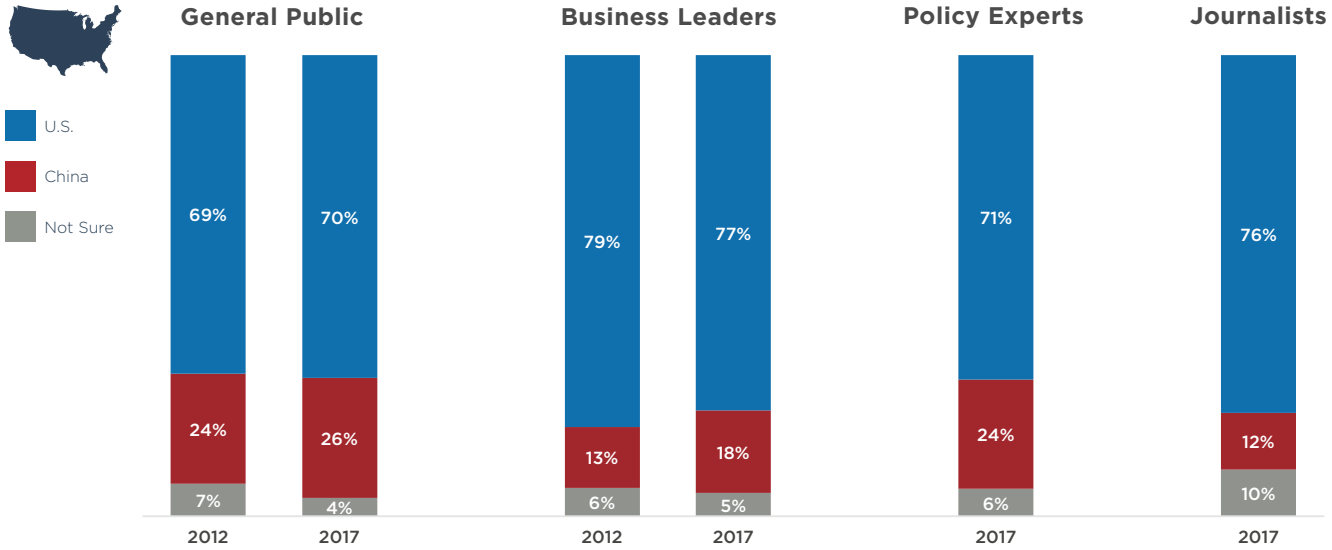
- 56% of the Chinese public thinks that to become a global superpower, China should promote stable economic growth and improve domestic quality of life, a sentiment echoed by at least three quarters of Chinese influencers.
- 53% of the Chinese public also believes that China should strengthen the military to protect their national interests, though only 44% of Chinese business leaders, 49% of policy experts and 39% of journalists agree.
- 36% of the Chinese public (up from 27% in 2012) thinks China should grow their international stature through diplomacy and taking a leadership role.

Note: Complete datasets and additional analyses available at Committee100.org

2.1 WHICH COUNTRY HAS A BETTER INTERNATIONAL IMAGE?

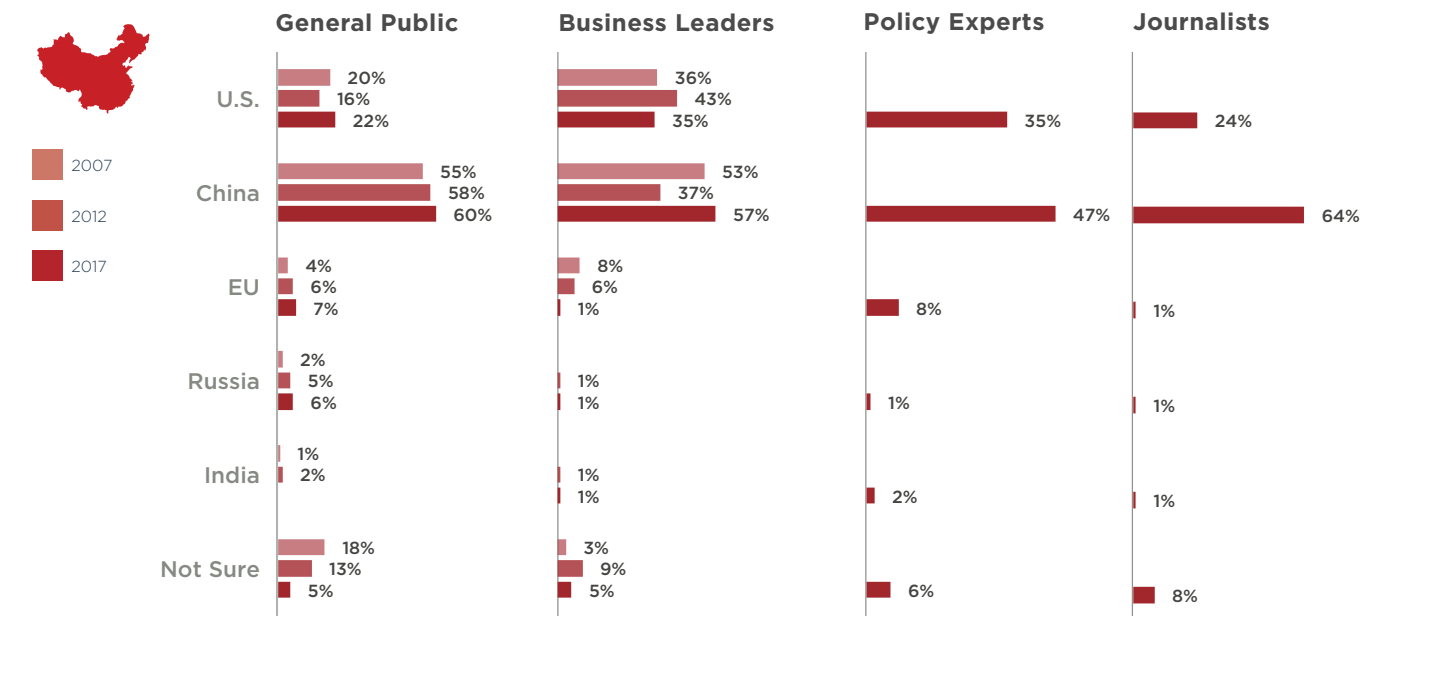
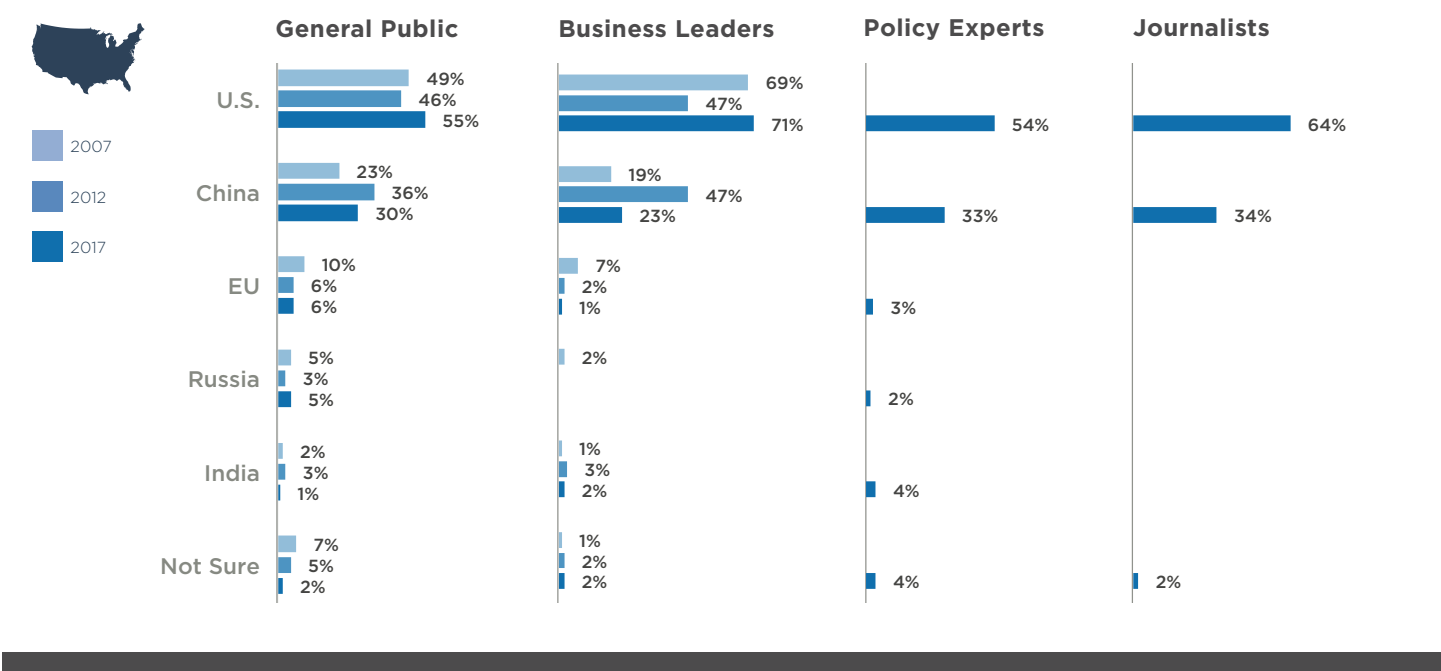
BASE QUESTION:

Which country currently has a better international image?



2.2 WHO WILL BE THE WORLD’S LEADING SUPERPOWER IN 20 YEARS?

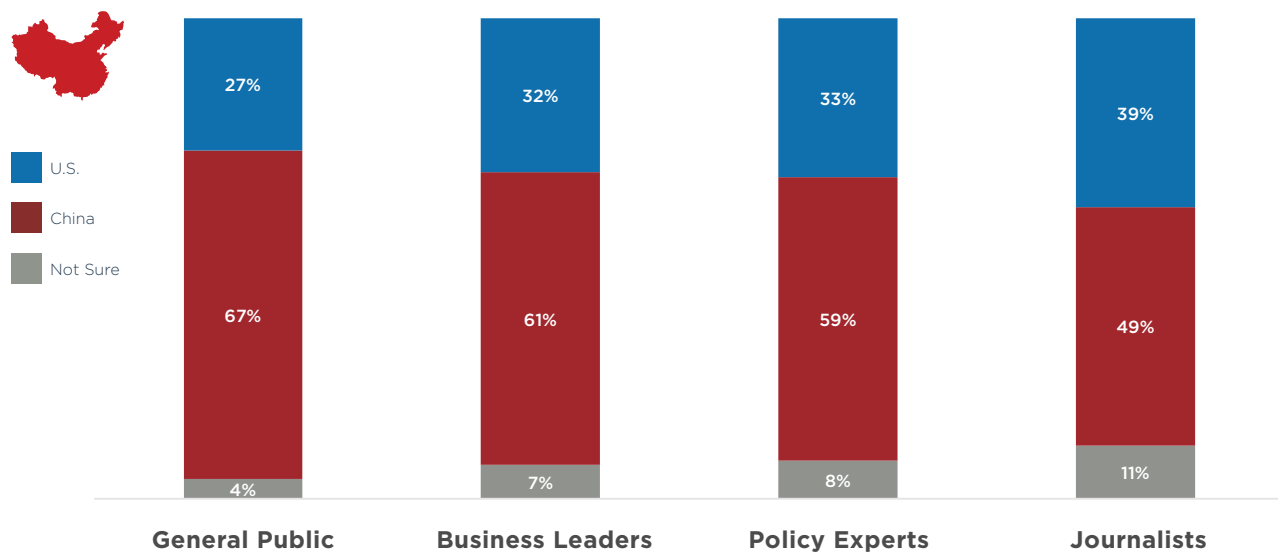
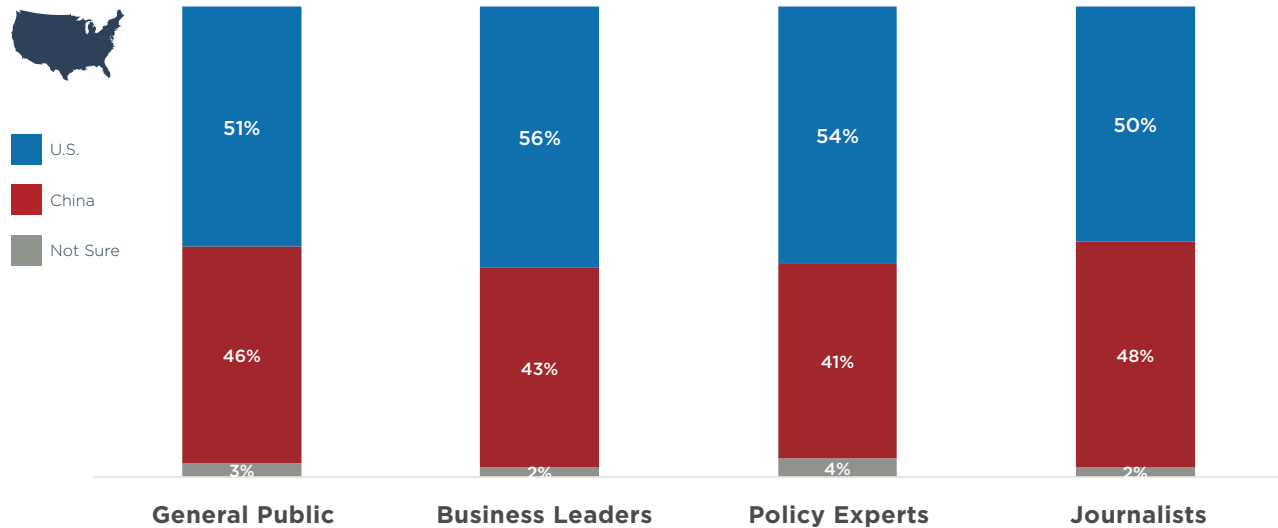
BASE QUESTION:
Which nation or political region do you think will be the world’s leading superpower twenty years from now?



2.3 WHICH COUNTRY WILL HAVE THE MOST INFLUENCE ON THE GLOBAL ECONOMY OVER THE NEXT 20 YEARS?

BASE QUESTION:

Which country do you think will have the most influence over the global economy in the next 20 years?

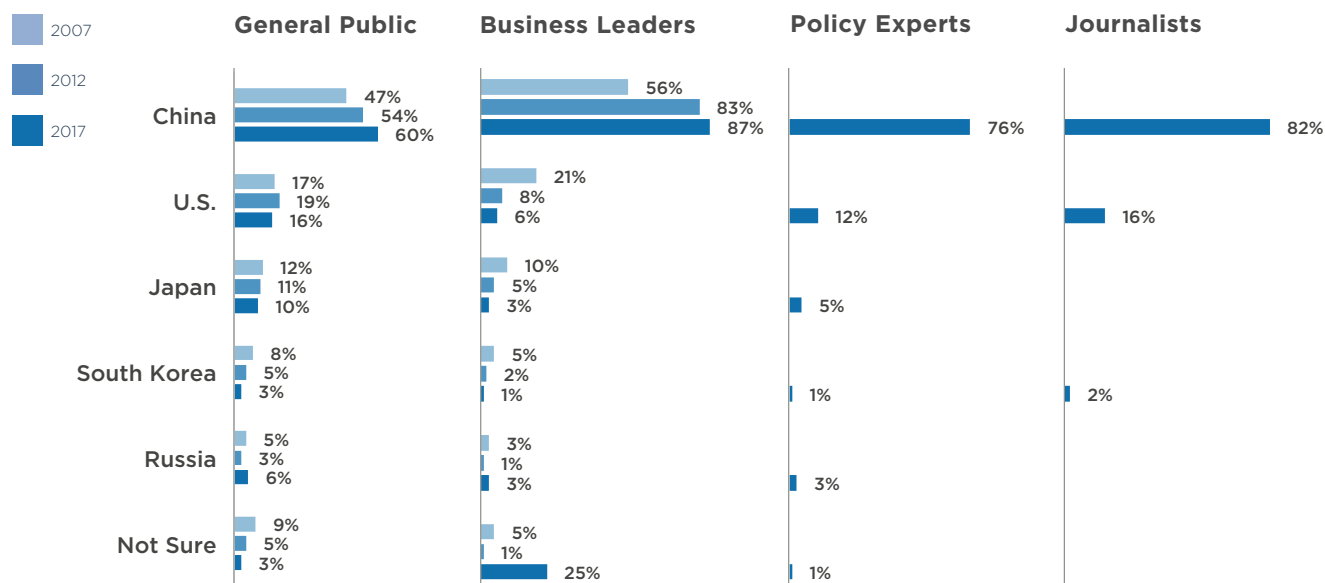


2.4 WHO WILL HAVE THE MOST INFLUENCE IN THE ASIA-PACIFIC IN 20 YEARS?



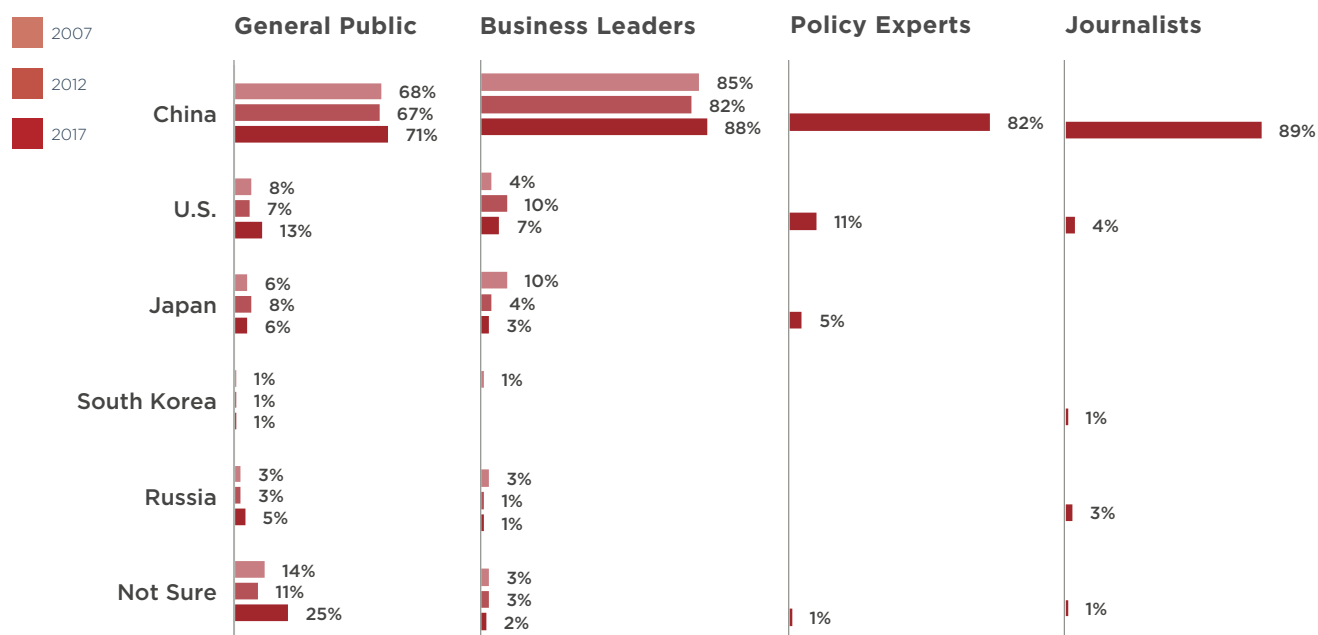
U.S. QUESTION:

Which one of the following countries do you expect to have the greatest degree of influence in the Asia-Pacific region twenty years from now?



CHINA QUESTION:

Which one of the following countries do you expect to have the greatest degree of influence in the Asia-Pacific region twenty years from now?

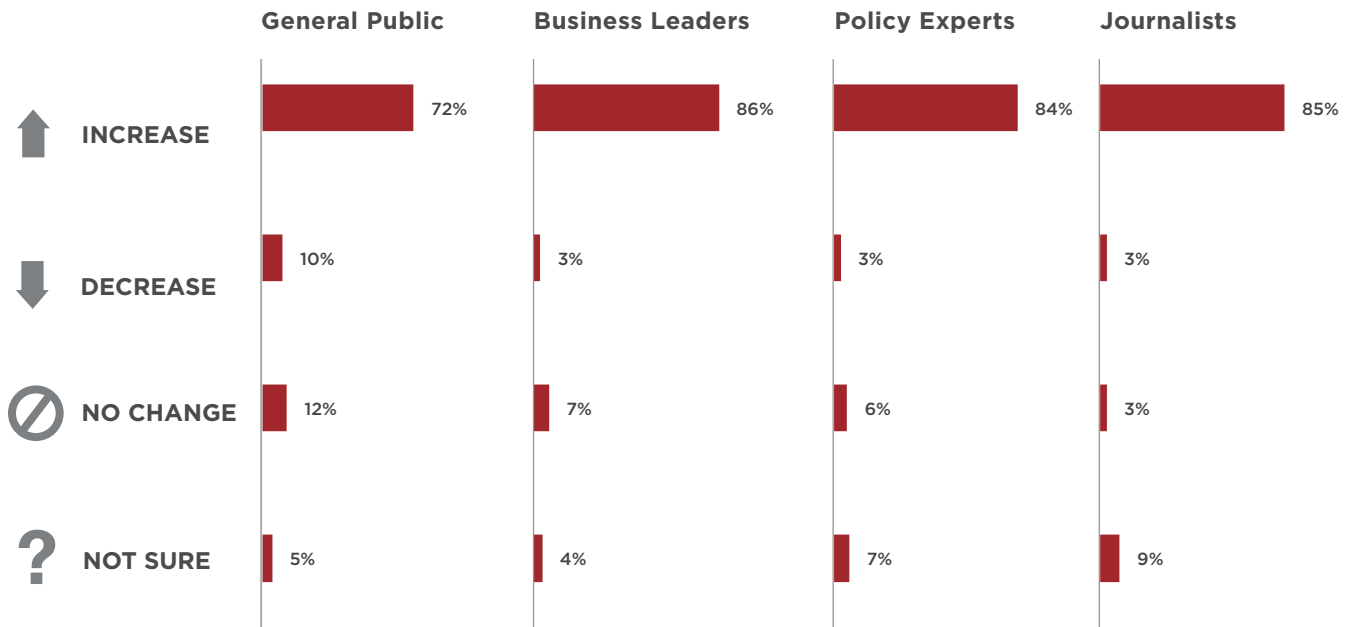


2.5 HAS THE INFLUENCE OF CHINA IN THE WORLD INCREASED OR DECREASED IN THE PAST DECADE?



CHINA QUESTION:

In your opinion, over the past ten years, has the influence of China in the world increased, remained about the same, or decreased?

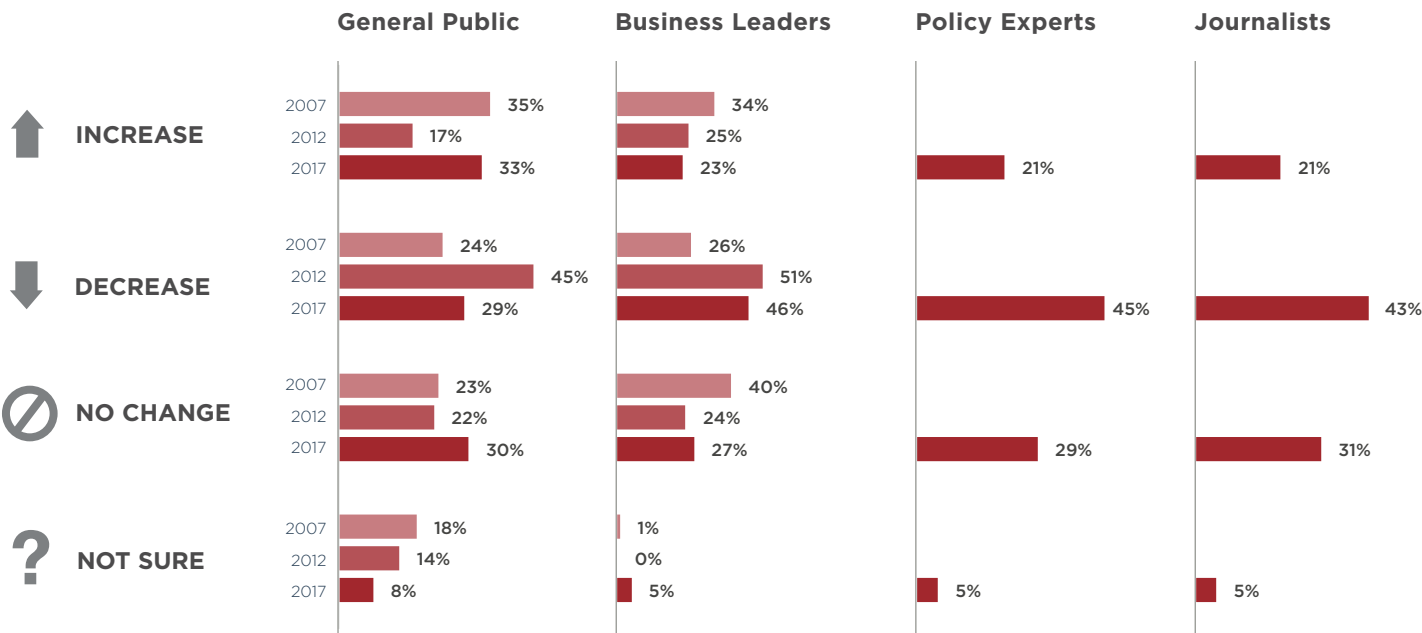


2.6 HAS THE INFLUENCE OF THE U.S. IN THE WORLD INCREASED OR DECREASED IN THE PAST DECADE?



CHINA QUESTION:

In your opinion, over the past ten years, has the influence of the U.S. in the world increased, remained about the same, or decreased?

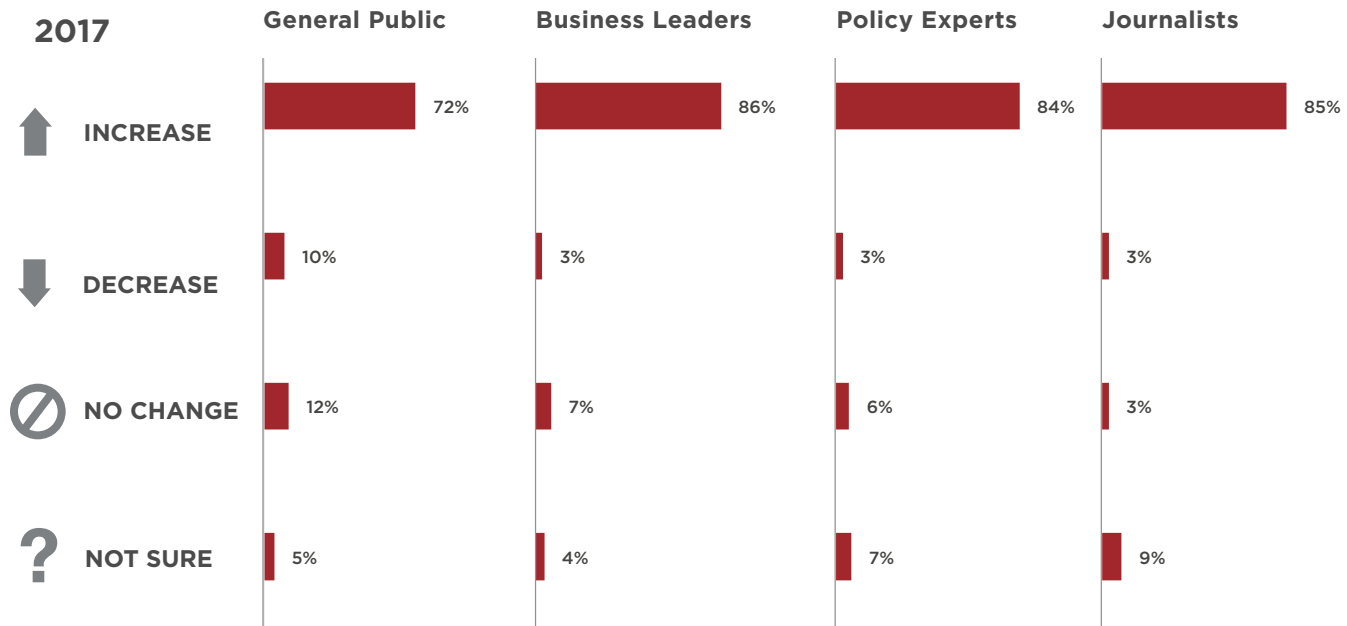


2.7 WILL CHINA'S INFLUENCE INCREASE OR DECREASE IN THE NEXT 10 YEARS?

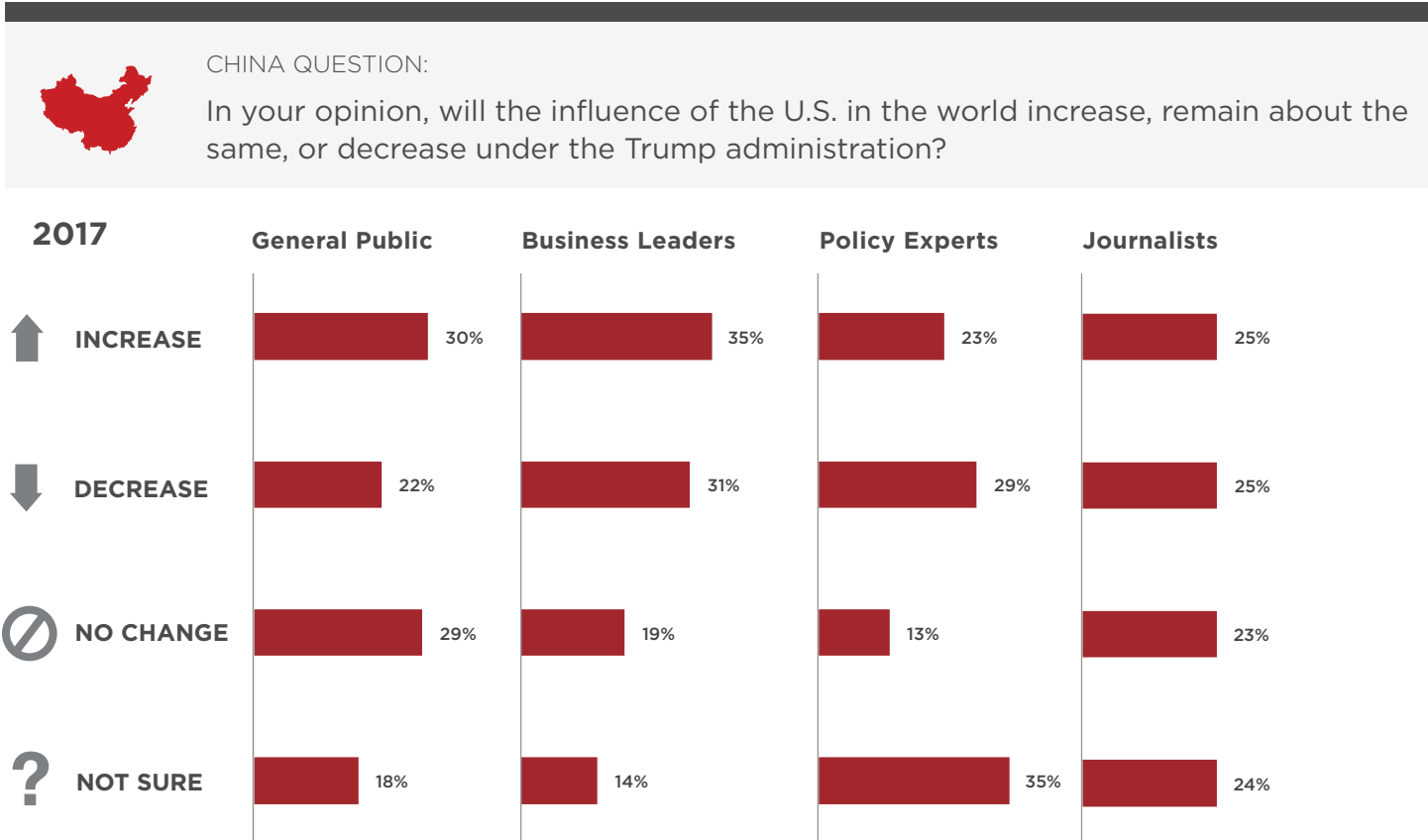


CHINA QUESTION:

In your opinion, will the influence of China in the world increase, remain about the same, or decrease in the next 10 years?



2.8 WILL AMERICA’S GLOBAL INFLUENCE INCREASE OR DECREASE UNDER THE TRUMP ADMINISTRATION?

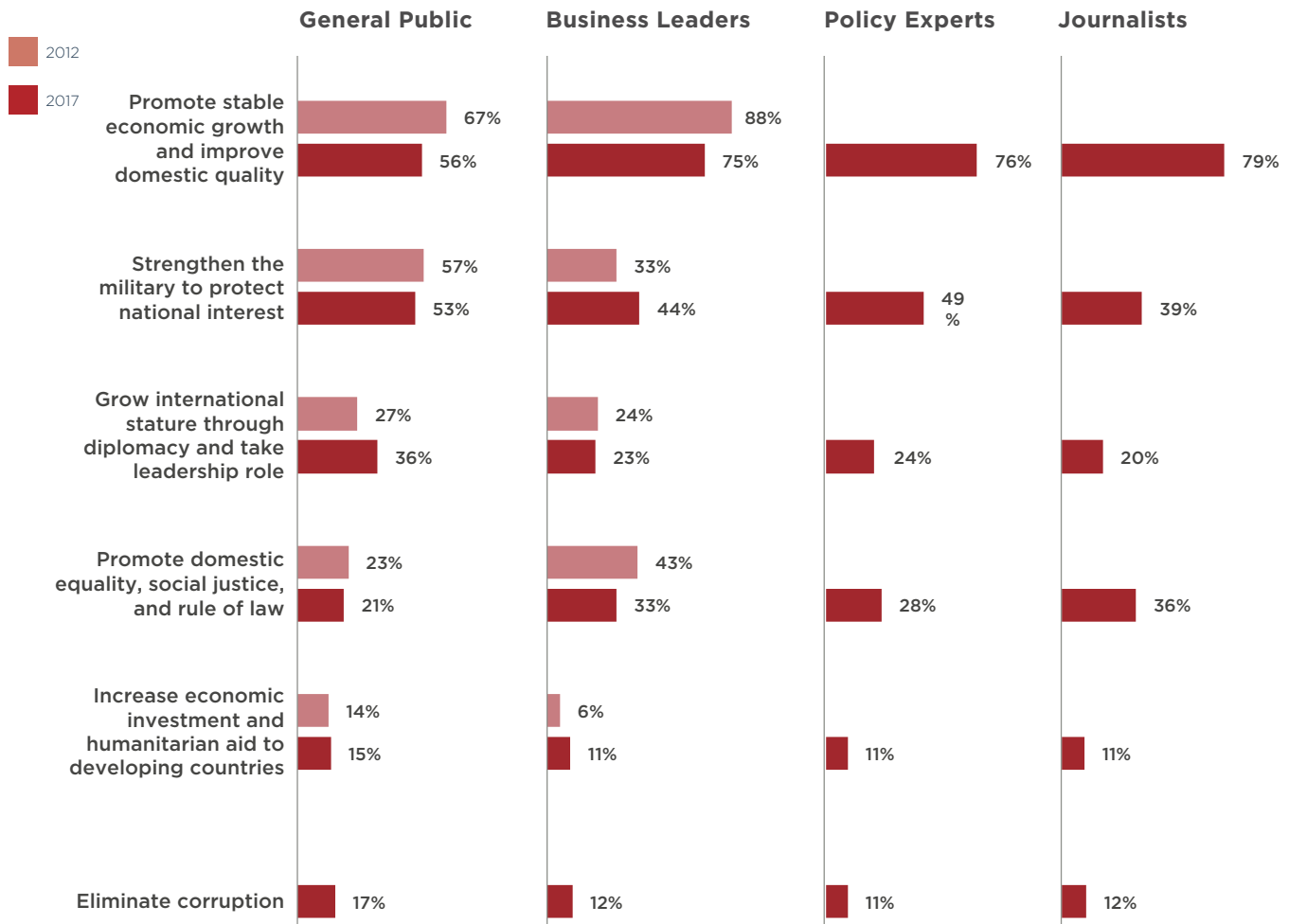


2.9 WHAT SHOULD CHINA DO TO BECOME A GLOBAL SUPERPOWER?



CHINA QUESTION:

What do you think China should do to become a global superpower?



Note: In 2012, this question was "As China becomes a global superpower, what do you think China should do?"

III. MUTUAL INTERESTS AND CONCERNS

HIGHLIGHTS

Common Interests

- Americans and Chinese now share common interests in a variety of areas. On the most important domestic issues facing their respective countries, Americans cite i) jobs and the economy, ii) politics/government/corruption/campaign finance reform; iii) health care/insurance and iv) immigration as their top concerns. The Chinese name i) jobs and the economy; ii) health care/insurance; iii) social security/elderly care and iv) education as their top domestic concerns.
- Americans and Chinese agree that trade, global financial stability, and the environment are the main areas in which both countries would benefit from working together.
- The U.S. and China believe that the other country is important in reducing tensions on the Korean peninsula.
- For the first time, Americans and Chinese share similar personal life goals, with having “a happy family” being the top goal for both countries.

Shared Environmental Concerns:

- 60% of the American public and 79% of the Chinese public (the highest percentage yet in the last decade) personally worry about climate change.
- A majority of Americans are critical of both the U.S. government’s (75%) and the Chinese government’s (84%) handling of environmental issues.
- A majority of Chinese think both the U.S. government (62%) and Chinese government (56%) are doing a good job on this front.

Less Worry About Corruption

- For the Chinese public, there has been a major decline in corruption being an important domestic issue (from 43% in 2012 to 14% in 2017), and an increase in worry about jobs and healthcare, education and schools, and social security and the environment.
- Compared to the Chinese public (14%), 31% of Chinese business leaders, 30% of policy experts, and 24% of journalists still worry about corruption.

Potential Conflicts

- For the U.S. public, industrial espionage/cybersecurity issues and trade are the two most likely sources of conflict between the U.S. and China in the near future.
- For the Chinese public, Taiwan and the U.S. military presence in the Asia Pacific region are the two most likely sources of conflict.
- Both countries also cite China’s territorial disputes with neighboring countries as the third most likely source of conflict.

Less Concern Over Taiwan

- Over time, Taiwan has become less of a concern among the Chinese general public as a potential source of conflict between the U.S. and China. 54% of the Chinese public noted it as the biggest potential source of conflict in 2007, 49% felt the same in 2012, and only 37% feel the same way in 2017.

Increased Concern Over Cybersecurity

- For the U.S. public, cybersecurity has emerged in 2017 as a potential top source of conflict between the U.S. and China.
- More than two thirds of all U.S. respondents do not think the American or Chinese governments are doing enough to prevent international cyber-hacking. A majority of Chinese influencers (62% of business leaders, 50% of policy experts, and 65% of journalists) think that the American government is doing enough, but less than half of the same influencers (38% of business leaders, 25% of policy experts, and 44% of journalists) think the Chinese government is doing enough to prevent cyber-hacking.

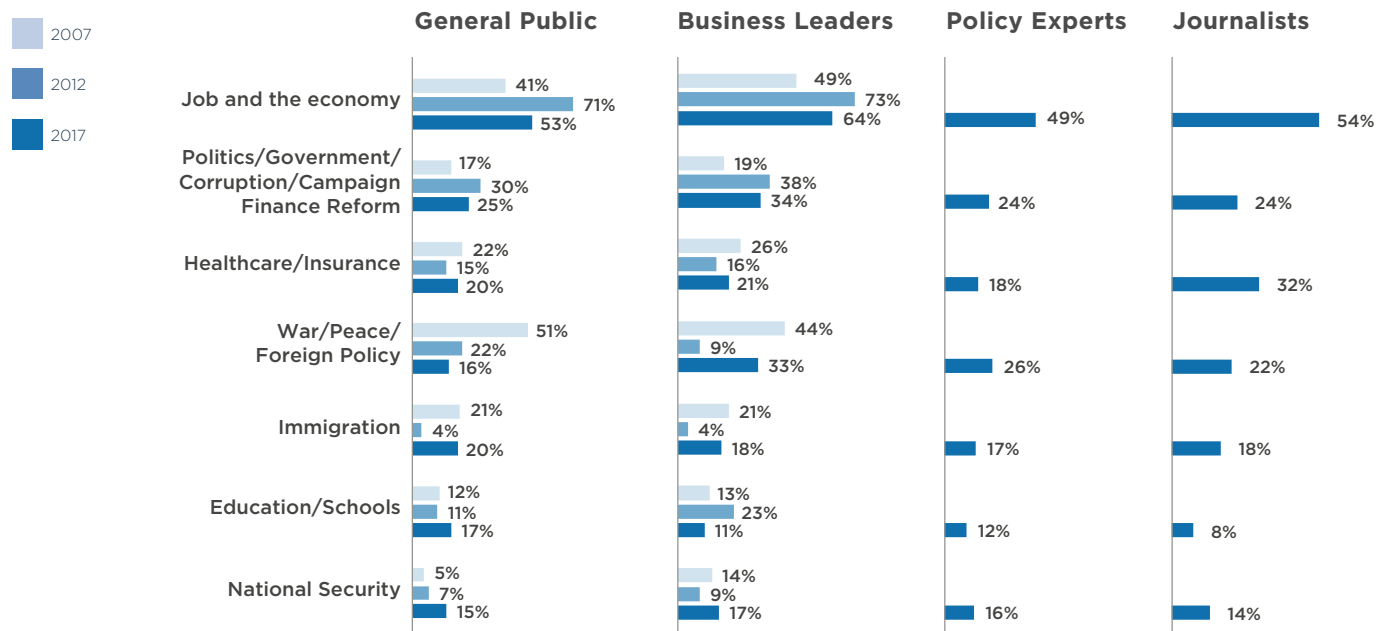
Note: Complete datasets and additional analyses available at Committee100.org

3.1 WHAT ARE THE MOST IMPORTANT ISSUES FACING YOUR COUNTRY?



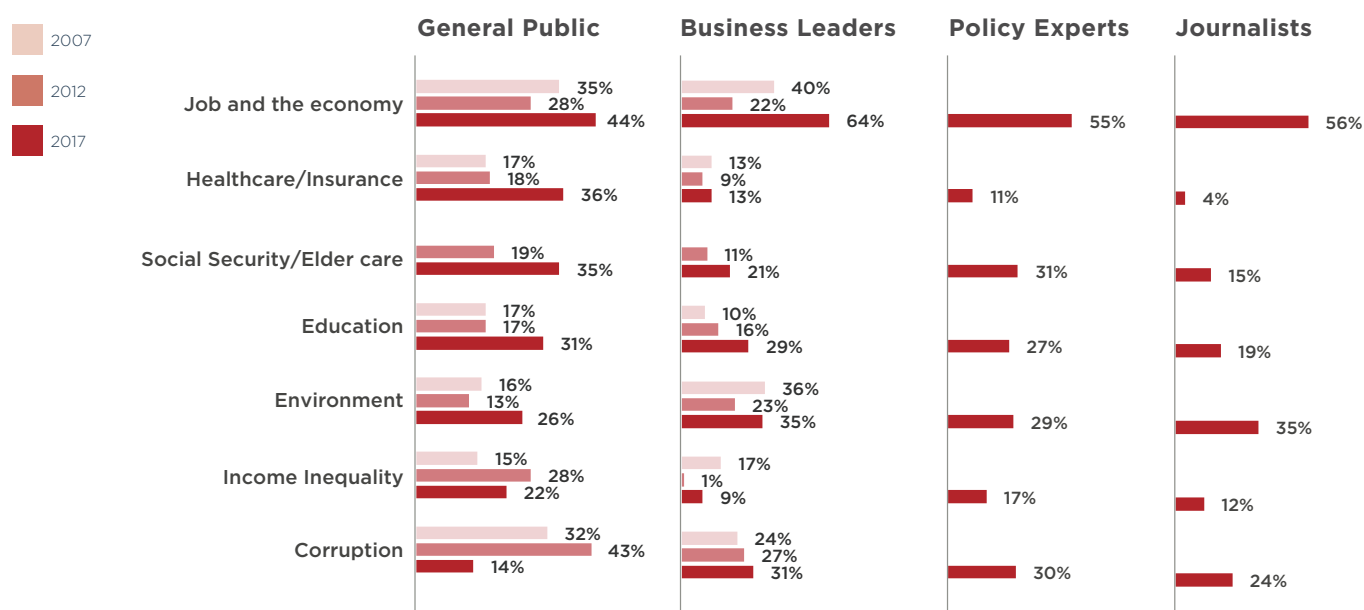
U.S. QUESTION:

What are the three most important issues facing the U.S. today?




CHINA QUESTION:

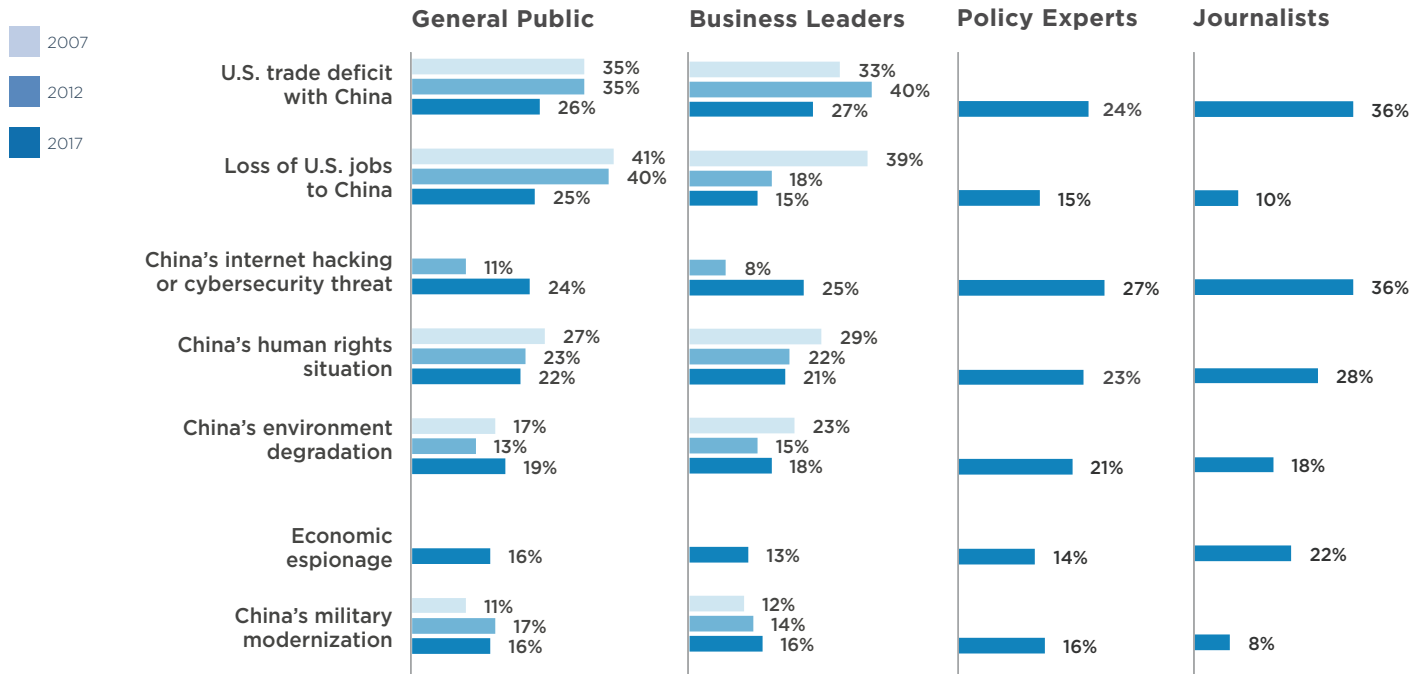
What are the three most important issues facing China today?




3.2 WHAT ARE YOUR GREATEST CONCERNS ABOUT U.S.-CHINA RELATIONS?

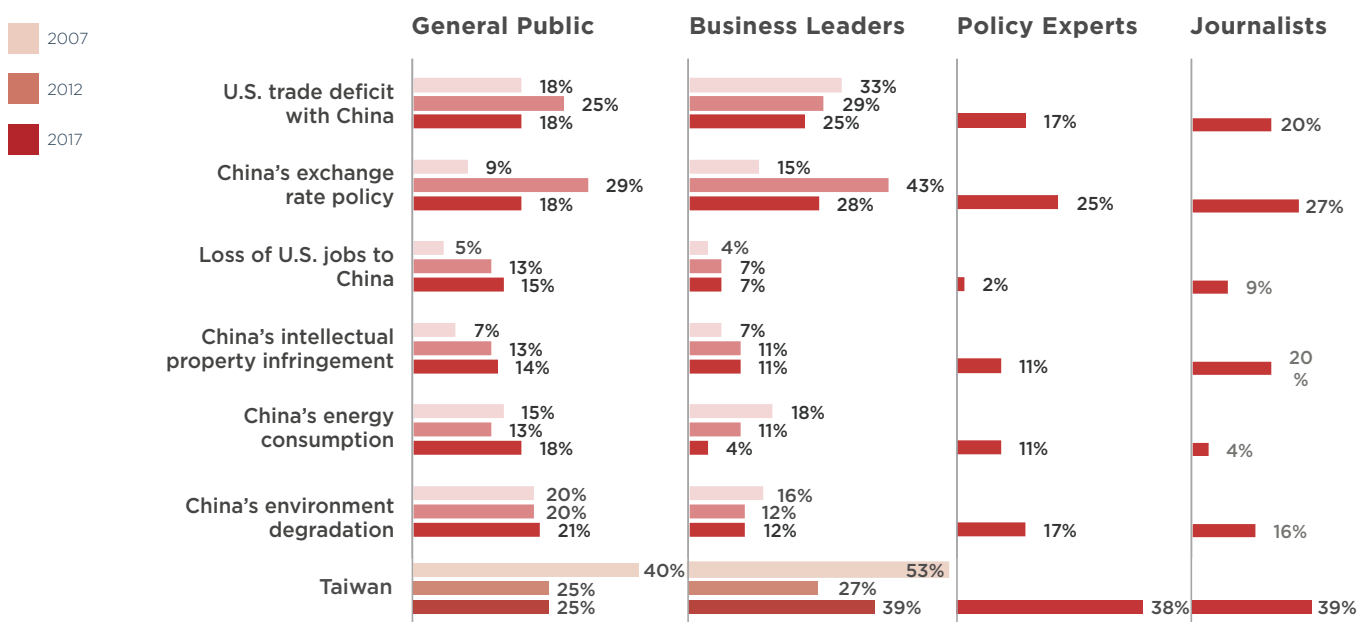


U.S. QUESTION:
What are your two greatest concerns about the U.S.-China relationship?





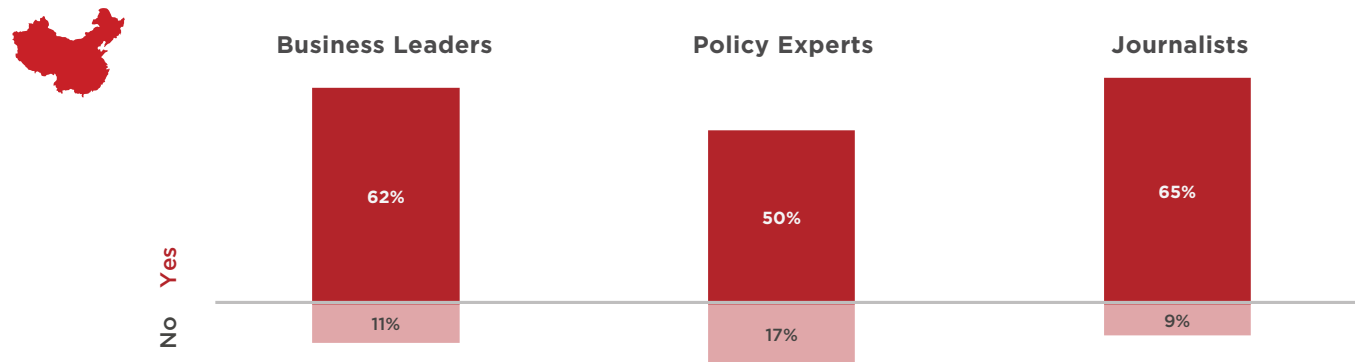
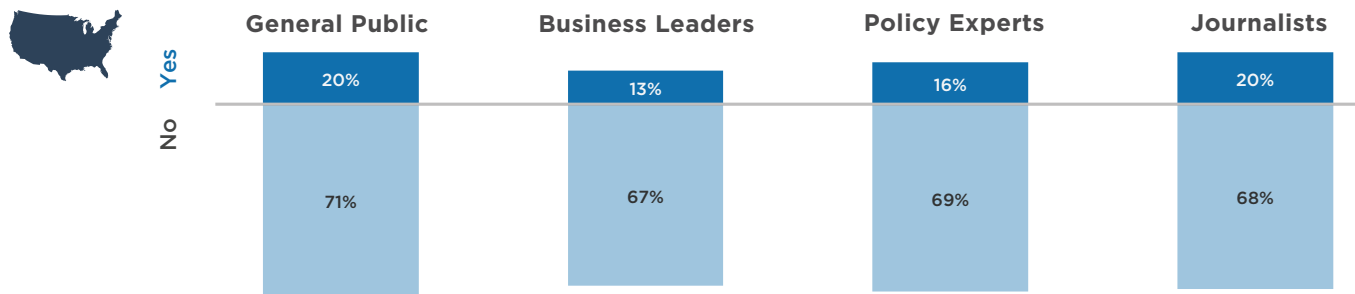
CHINA QUESTION:
What are your two greatest concerns about the U.S.-China relationship?



3.3 IS AMERICA’S GOVERNMENT DOING ENOUGH TO PREVENT INTERNATIONAL CYBER-HACKING?

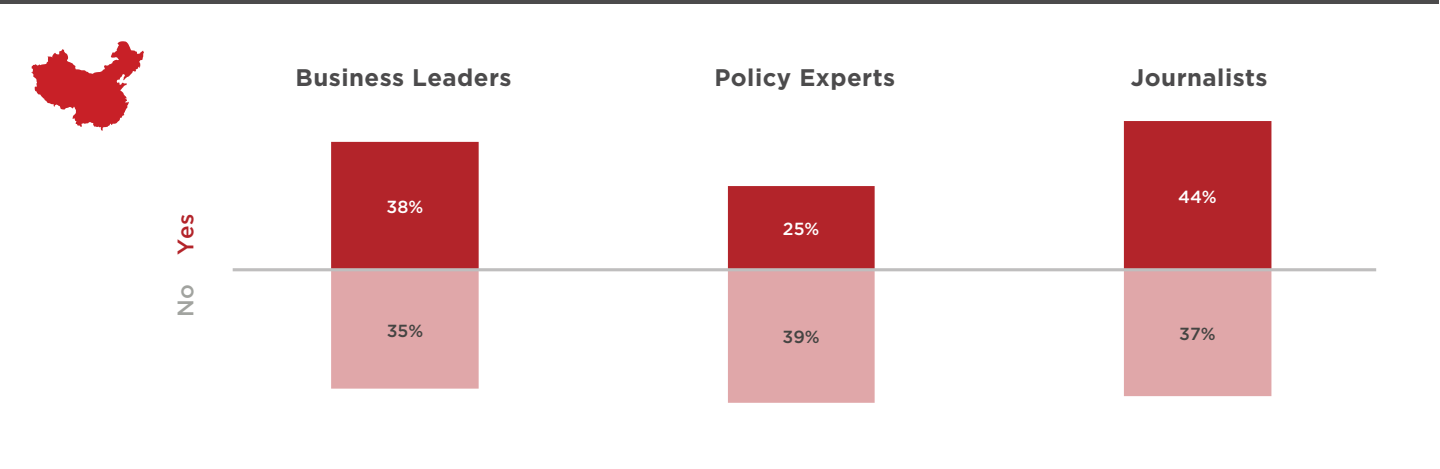
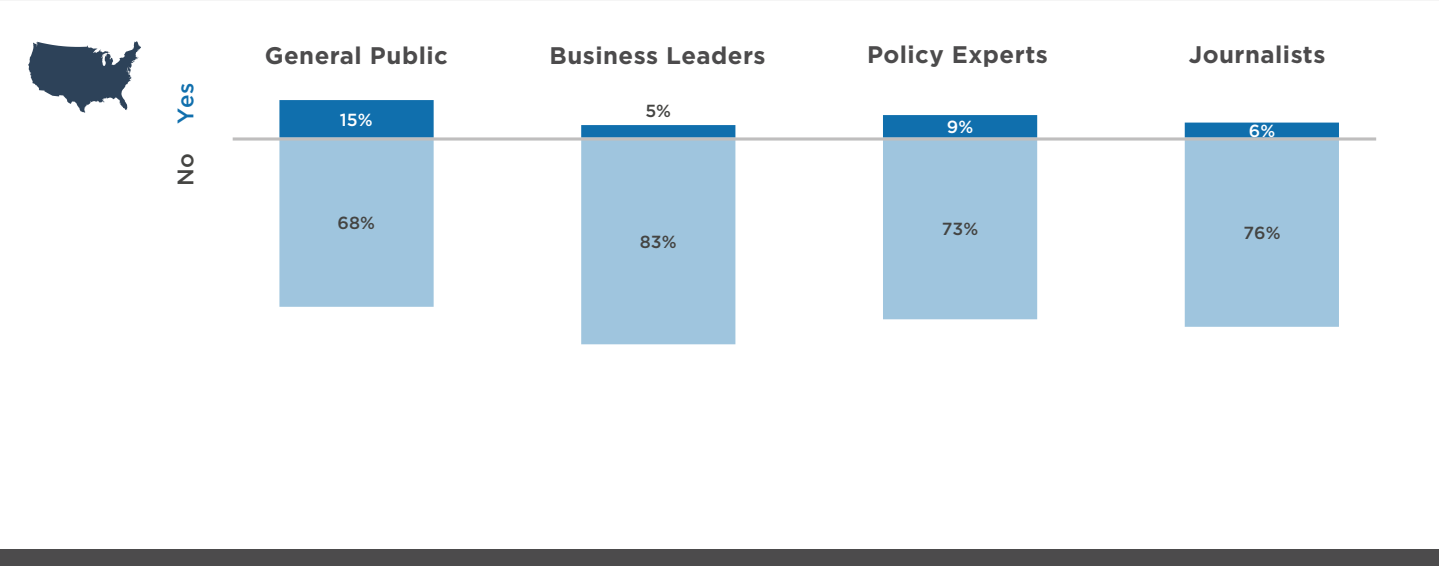
BASE QUESTION:

Is the American government doing enough to prevent international cyber-hacking?



3.4 IS CHINA’S GOVERNMENT DOING ENOUGH TO PREVENT INTERNATIONAL CYBER-HACKING?

BASE QUESTION:
Is the Chinese government doing enough to prevent international cyber-hacking?

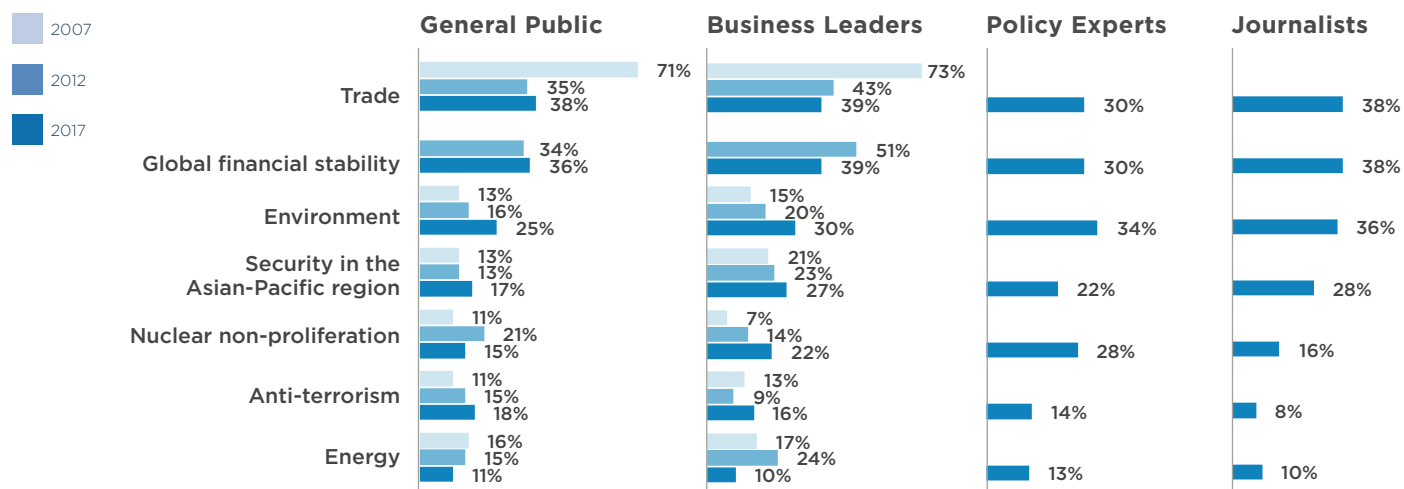


3.5 WHAT AREAS WOULD THE U.S. AND CHINA BENEFIT FROM WORKING TOGETHER?



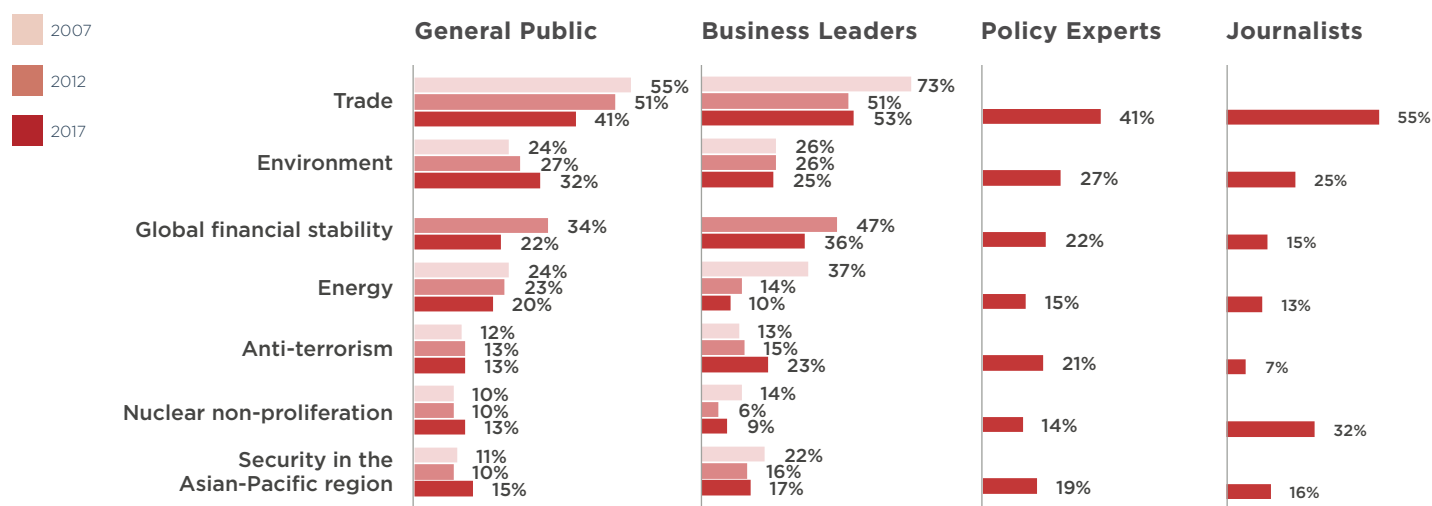
U.S. QUESTION:

In what two areas do you think that the U.S. and China would benefit from working together?



CHINA QUESTION:

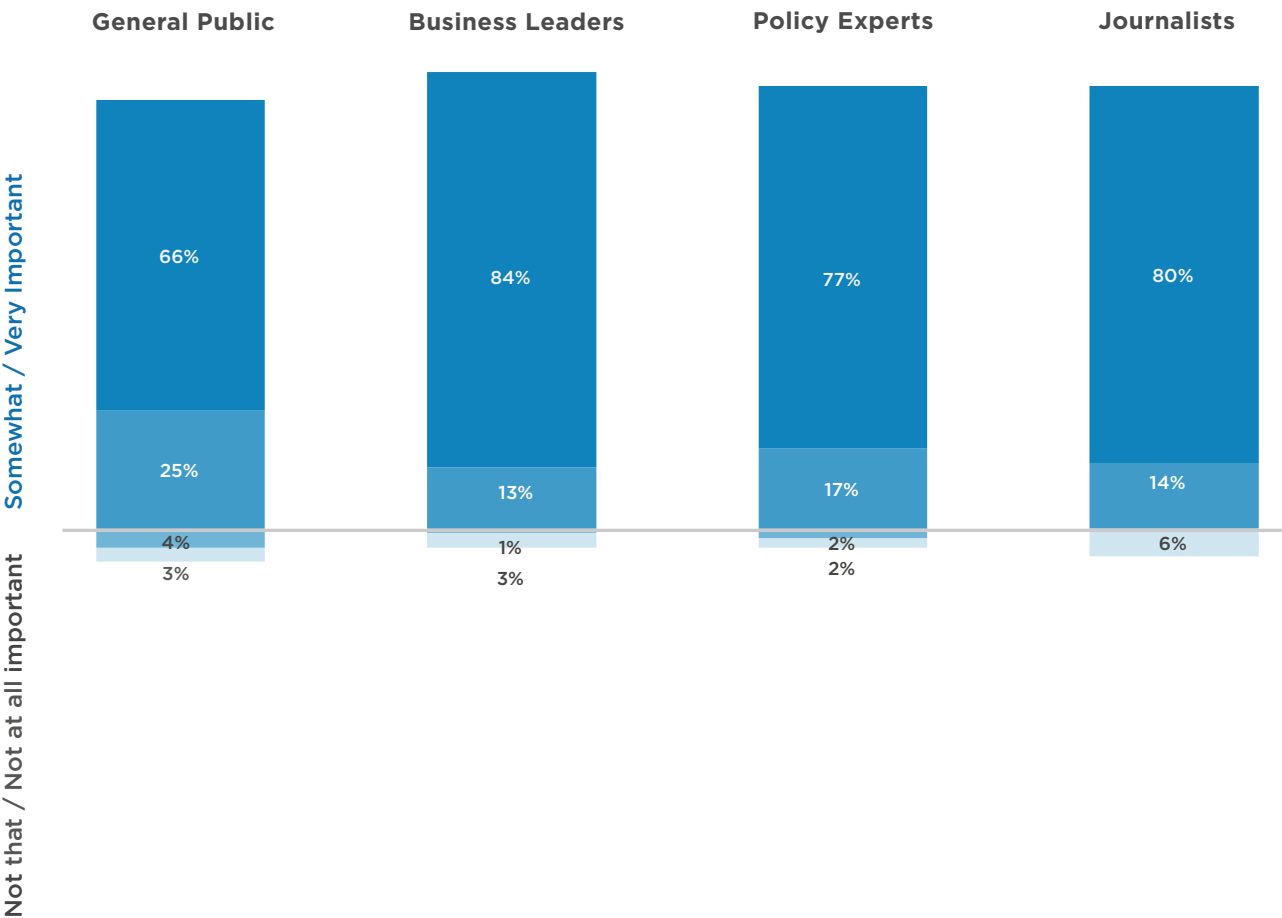
In what two areas do you think that the U.S. and China would benefit from working together?



3.6 HOW IMPORTANT IS CHINA IN DETERRING NUCLEAR PROLIFERATION IN NORTH KOREA?



U.S. QUESTION:
How important is China in the U.S. efforts to deter nuclear proliferation in North Korea - very important, somewhat important, not that important, or not at all important?

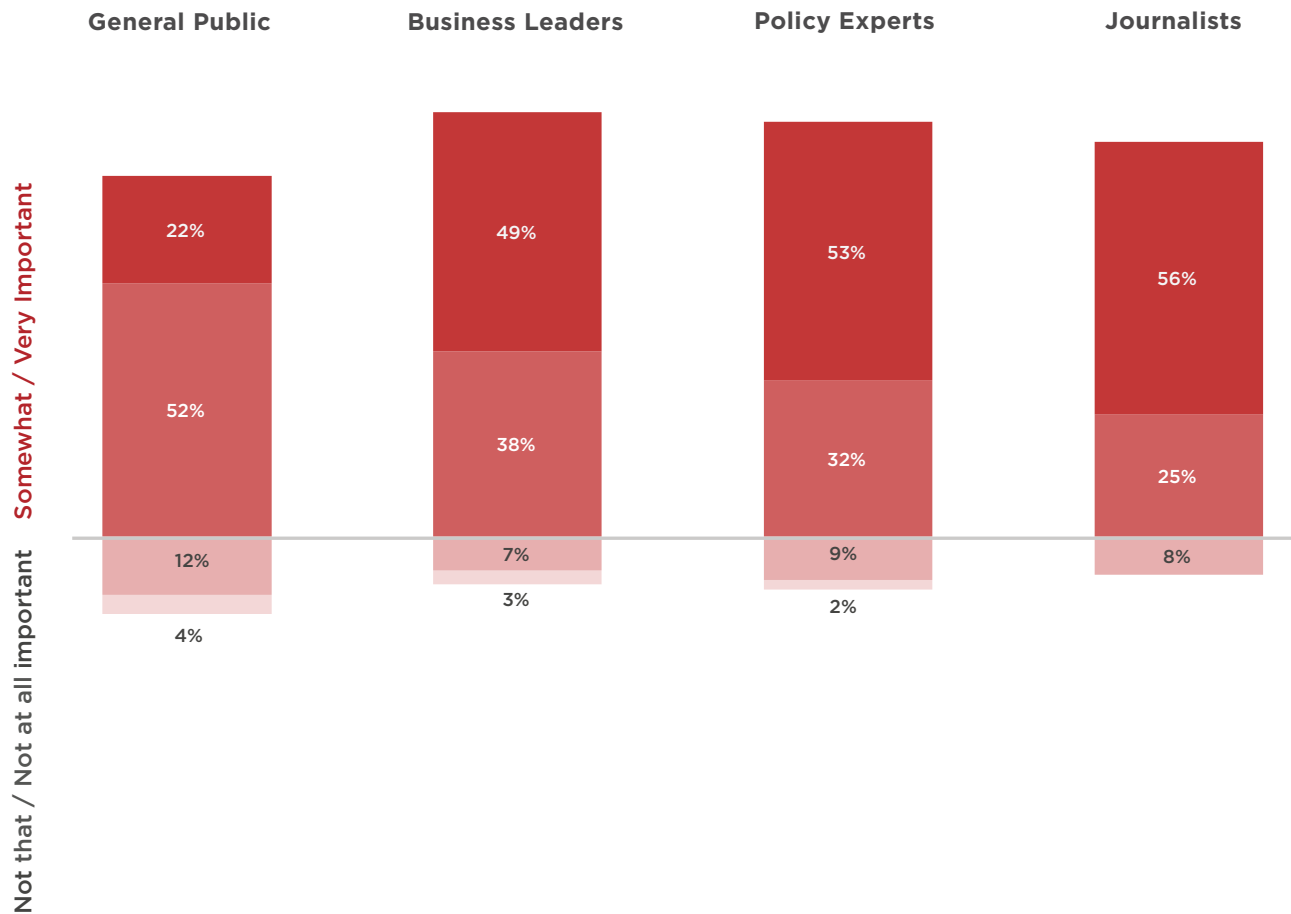


3.7 HOW IMPORTANT IS U.S.-CHINA COOPERATION IN REDUCING TENSIONS ON THE KOREAN PENINSULA?



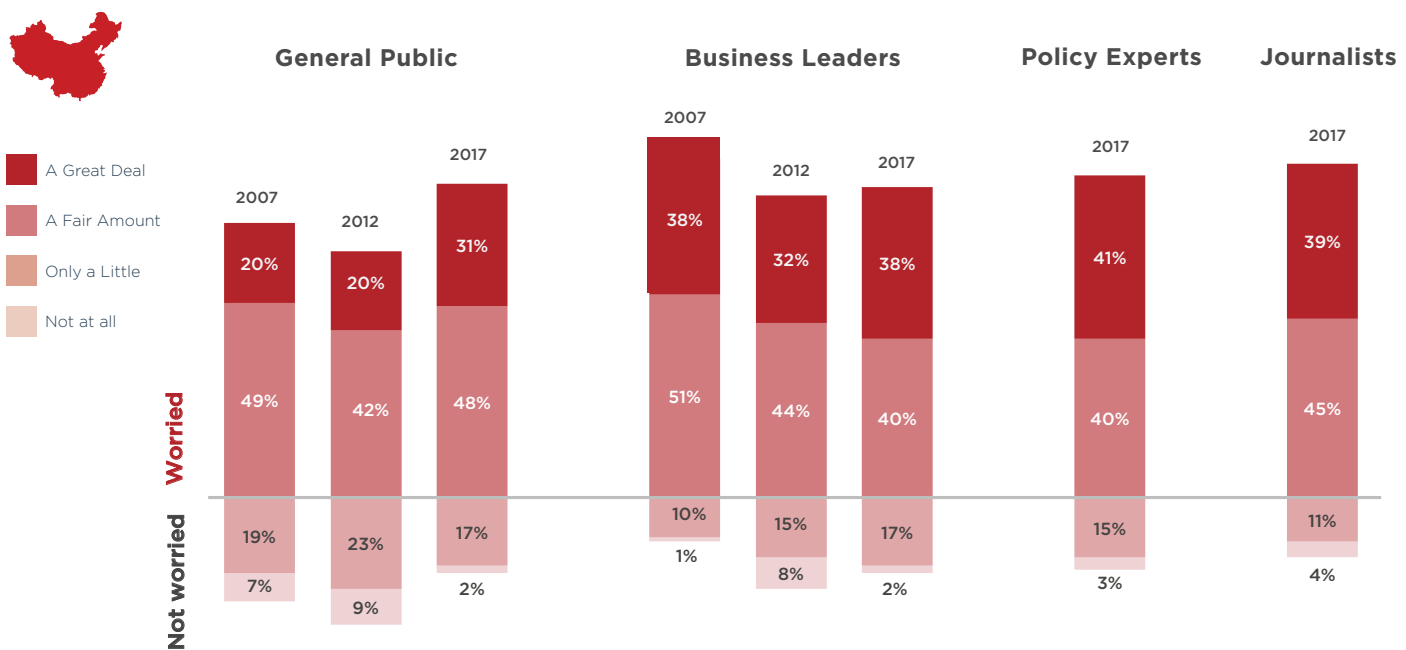
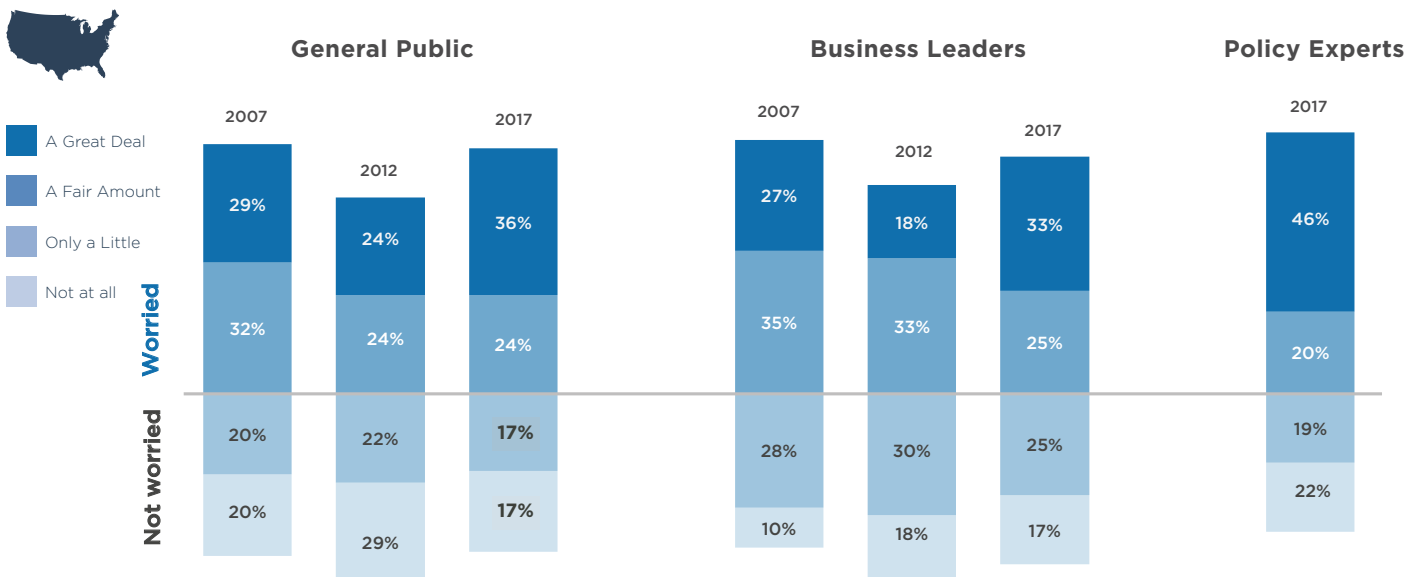
CHINA QUESTION:

How important is U.S. and China cooperation in reducing tensions on the Korean Peninsula - very important, somewhat important, not that important, or not at all important?



3.8 HOW MUCH DO YOU PERSONALLY WORRY ABOUT CLIMATE CHANGE?

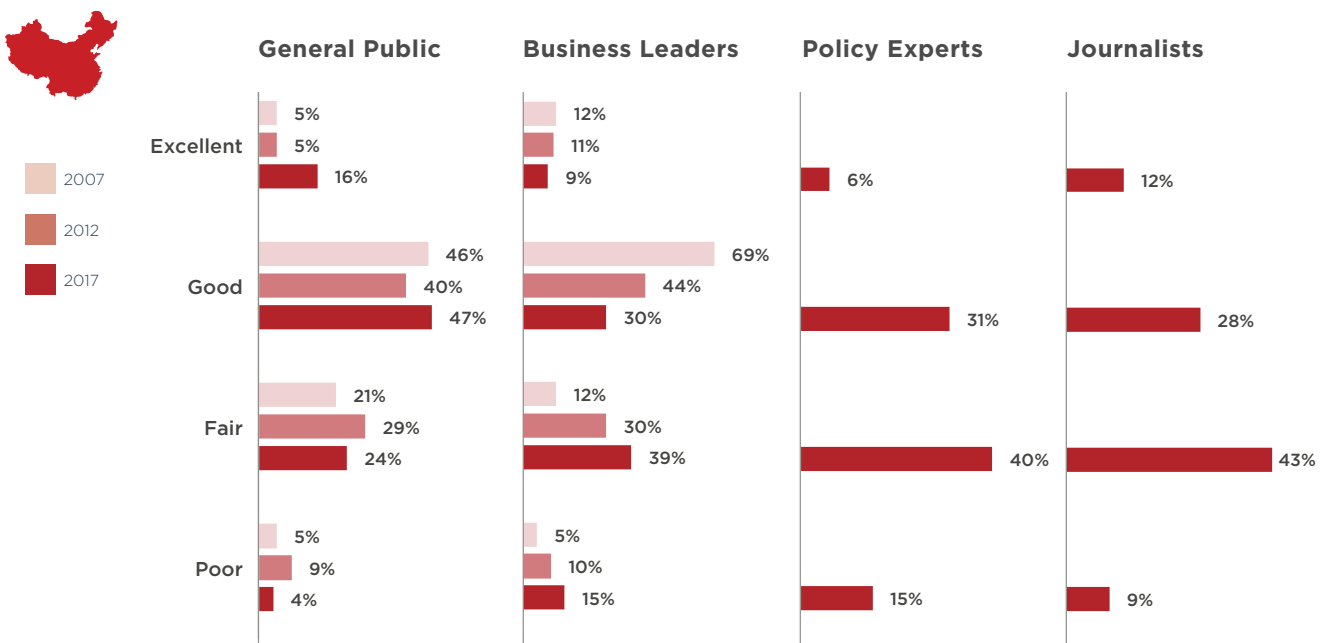
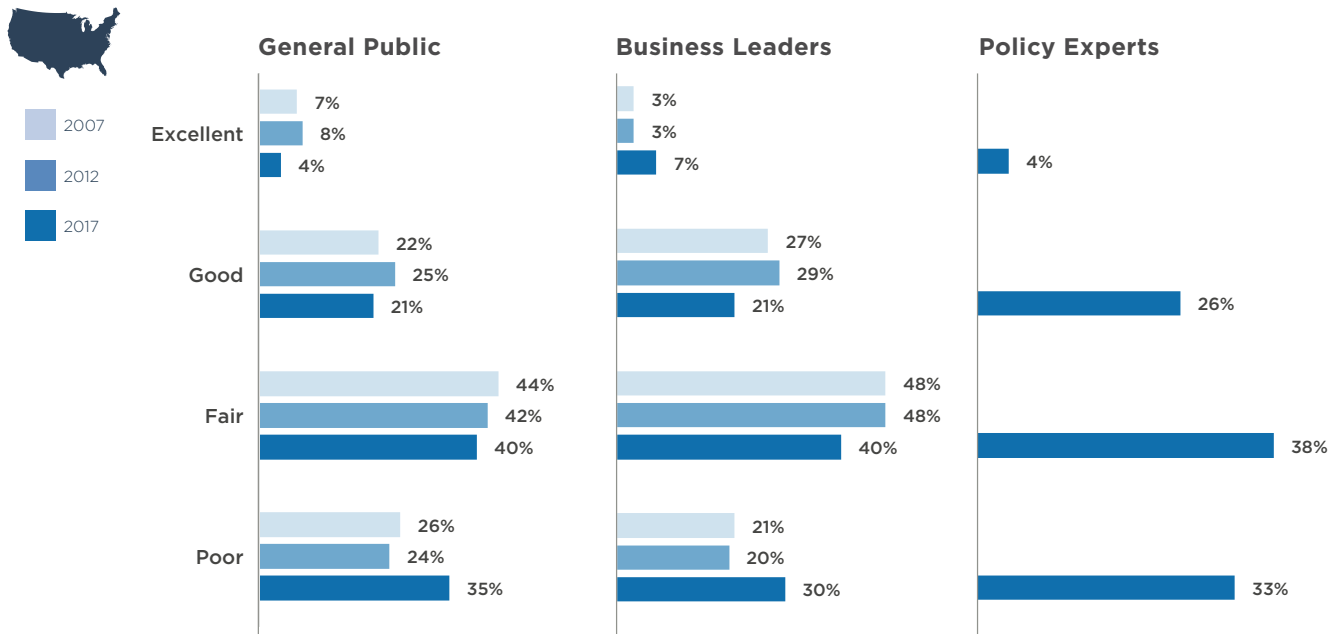
BASE QUESTION:
How much do you personally worry about climate change - a great deal, a fair amount, only a little, or not at all?



3.9 HOW DOES AMERICA'S GOVERNMENT PERFORM IN HANDLING ENVIRONMENTAL ISSUES?

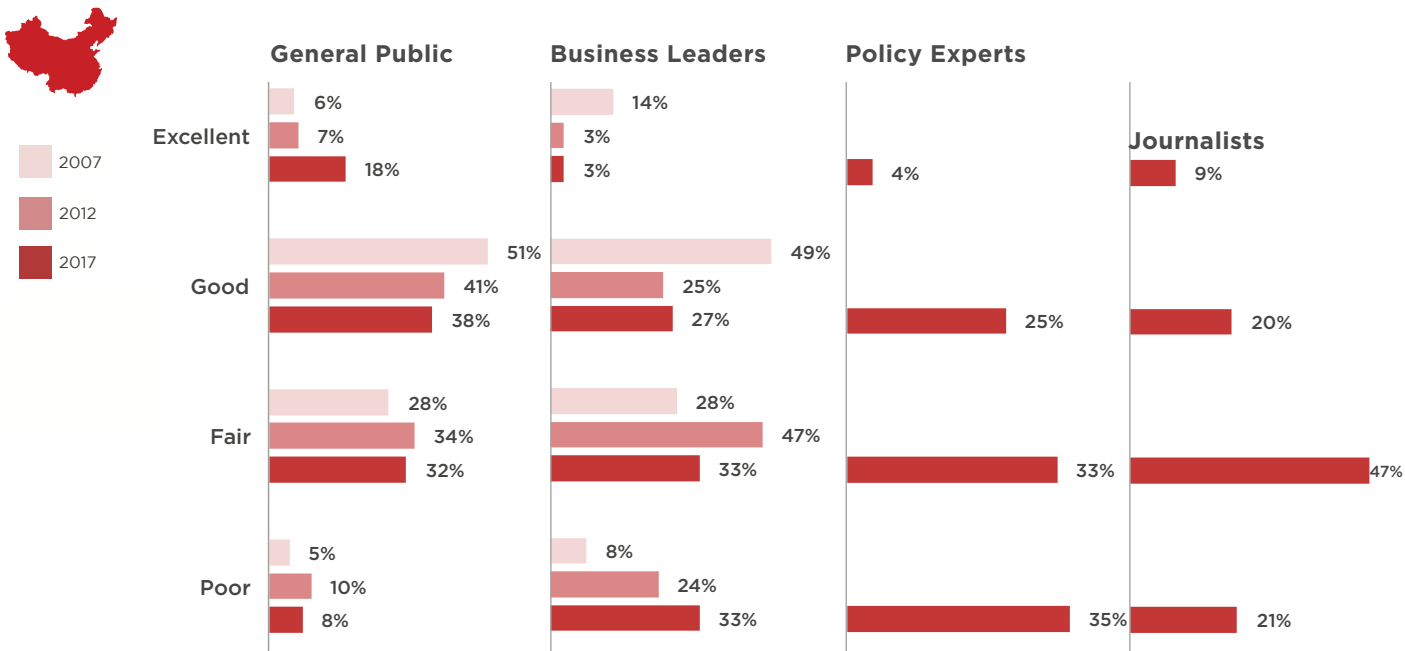
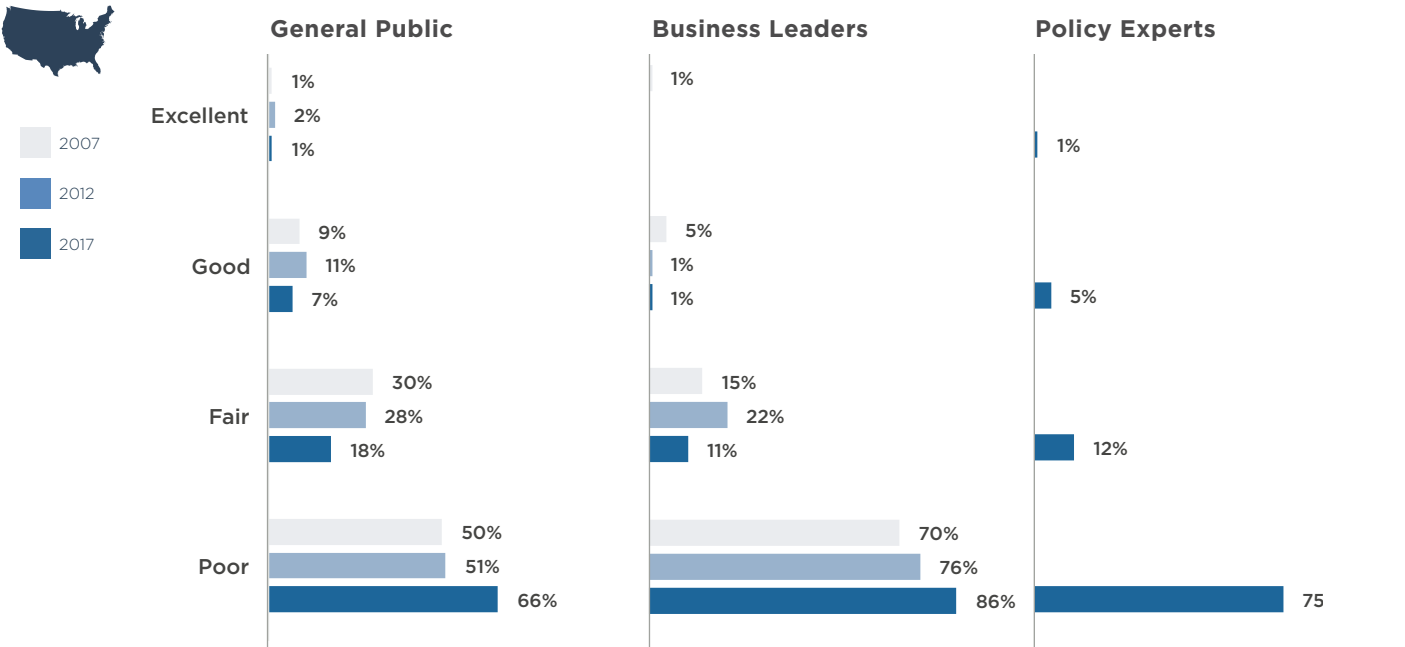
BASE QUESTION:

How would you rate the American government's performance in handling environmental issues?



3.10 HOW DOES CHINA’S GOVERNMENT PERFORM IN HANDLING ENVIRONMENTAL ISSUES?

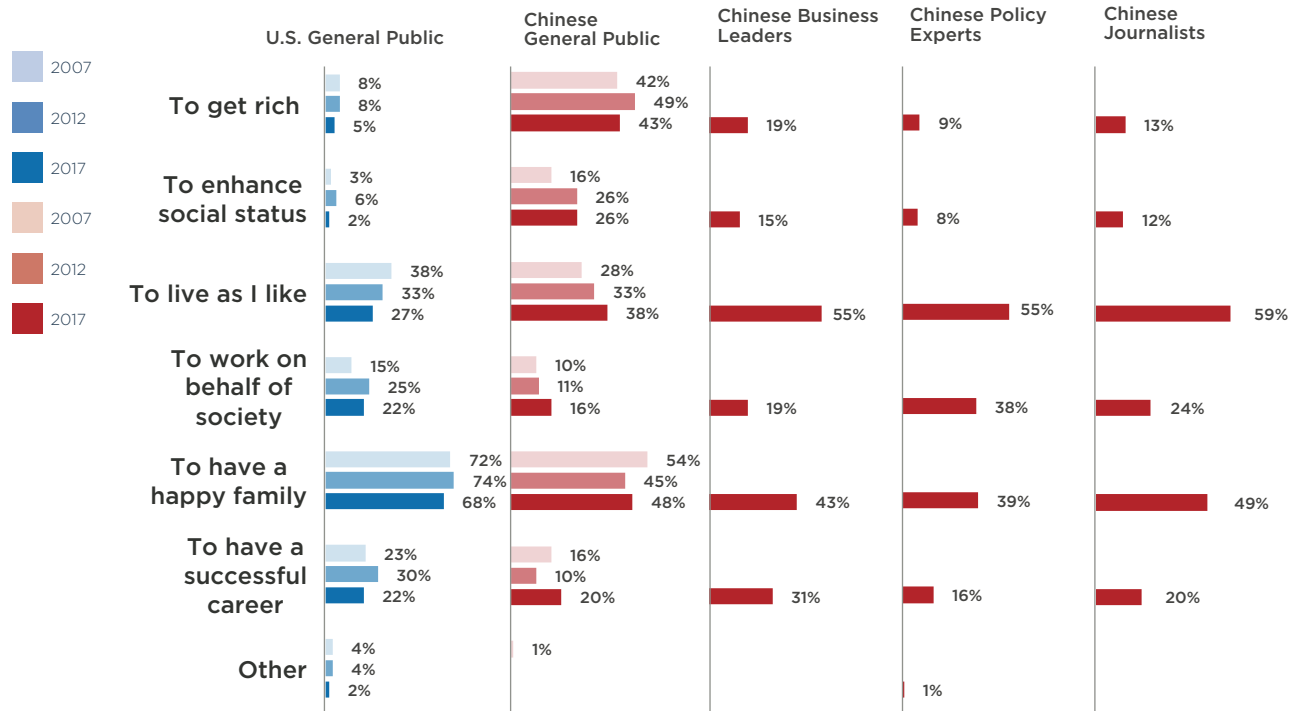
BASE QUESTION:
How would you rate the Chinese government’s performance in handling environmental issues?



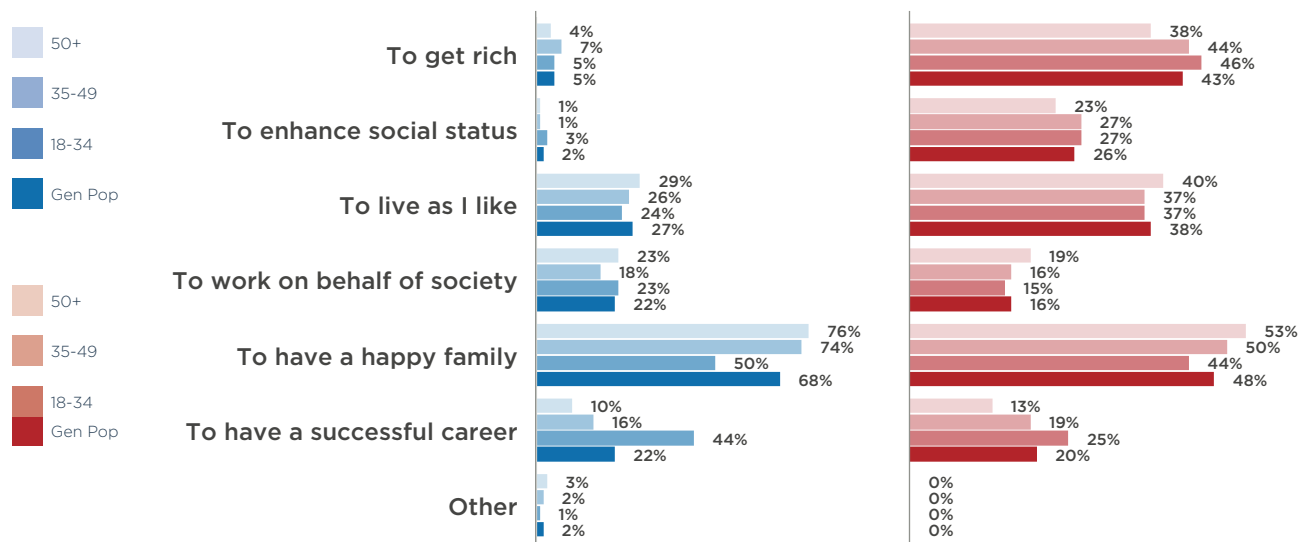
3.11 WHAT IS YOUR PERSONAL GOAL IN LIFE?

BASE QUESTION:

Which of the following comes closest to your current personal goal in life?



2017 GENERAL PUBLIC AGE BREAKDOWN



IV. U.S.-CHINA GEOPOLITICS

HIGHLIGHTS

World's Most Important Partnership

- While the U.S. and China regarded each other as their most important partner in 2012, in 2017, the U.S. views Great Britain as being a little more important than China, and China views Russia as being more important than the U.S.
- The importance of China to the U.S. has grown since 2012, but the importance of the U.S. to China has been steadily dropping in the last decade.
- This view is not shared by influencers in both countries who appreciate the importance of the U.S.-China relationship more than the general public.

American Views on China's Rise

- Around two thirds of the American public has consistently seen the U.S. as accepting China's status as rising power, while an increasing number of Chinese (61% in 2017, up from 52% in 2012 and 45% in 2007) see the U.S. as trying to prevent China from becoming a great power. This perception by the Chinese of the U.S. trying to contain China may help to explain declining Chinese sentiment and trust.

U.S.-China Relations

- In the last decade, an increasing number of Americans (30% in 2017, 26% in 2007 and 2012) and Chinese (28% in 2017, 26% in 2012, 13% in 2007) believe that the relationship between the U.S. and China is getting worse.
- Of this group, Americans and Chinese both see the U.S. government as being more responsible than the Chinese government for the deterioration in U.S.-China relations.
- More Americans think the U.S.-China relationship will get worse (46%) rather than improve (34%) under the new U.S. administration, whereas more Chinese believe the relationship will improve (32%) rather than worsen (23%).

Rating Government Performance

- 26% of the American public rates the U.S. government's handling of bilateral relations as excellent or good, down from 35% in 2012 and 30% in 2007. The Chinese public's rating of the U.S. government's excellent or good handling of bilateral relations is at 46% for 2017, up from 28% in 2007 and 2012.

- 76% of the Chinese public approves of their government's handling of bilateral relations, up from 53% in 2012 and 58% in 2007. 20% of the American public rates the Chinese government's handling of the bilateral relations as excellent or good, down from 26% in 2012 and 25% in 2007.

Greatest Concerns

- Economic issues dominate U.S. concerns about the U.S.-China relationship: the U.S. trade deficit with China and the loss of jobs to China are the top two U.S. concerns and have historically been so in past surveys. In 2017, Americans are also worried about cybersecurity.
- The top two Chinese concerns in 2017 are Taiwan and China's environment degradation, compared with China's Exchange Rate Policy and the U.S. trade deficit with China in 2012.

Potential for Military Conflict

- 39% of the American public and half of the Chinese public believe that a military conflict between the U.S. and China is likely in the next 10 years.

U.S. Presence in the Asia Pacific

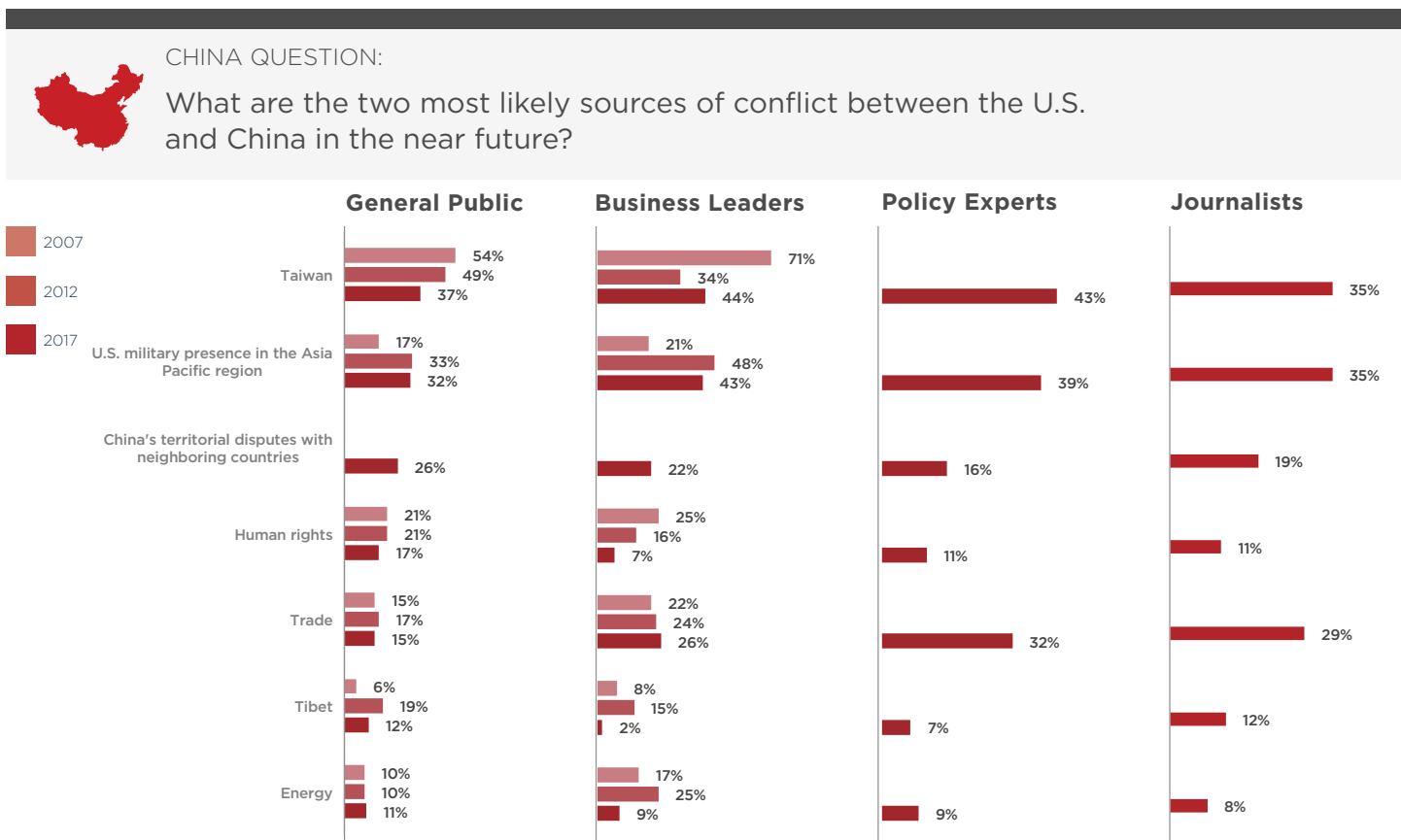
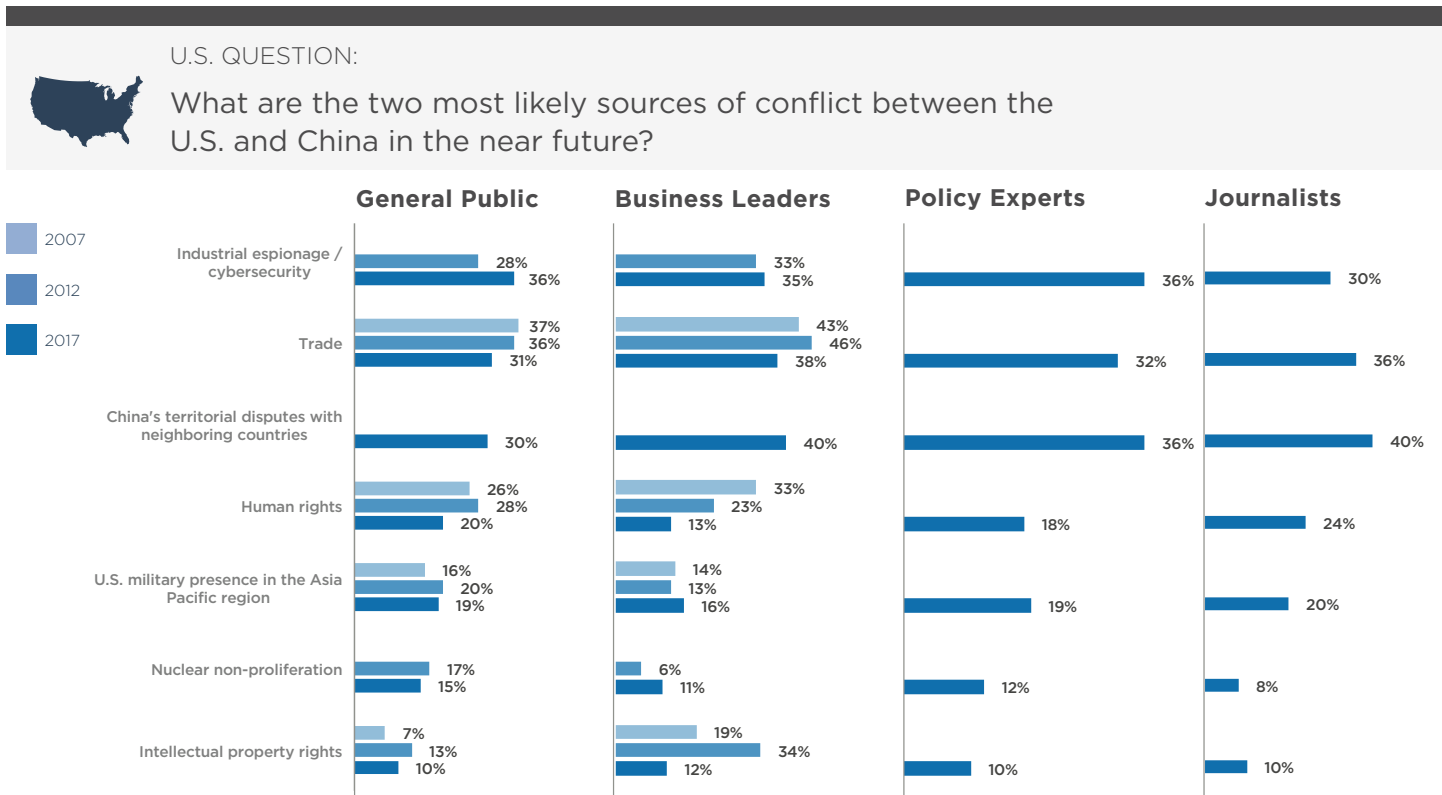
- 46% of both the Chinese and American public are familiar with the situation in the South China Sea where China, Vietnam, and other Asian countries have overlapping claims.
- 72% of the Chinese public sees these disputes over claims in the South China Sea as a regional issue that should be resolved by the nations involved; 52% of the American public believes that it is an international issue that the U.S. should be involved in, although only 39% of American millennials agree.
- Half of the Chinese public believes that the U.S. military presence in Asia will create tension among stakeholders, while 19% believes it will help maintain the security of the region.
- 60% of the U.S. public (71% of American millennials) don't think the U.S. should increase its military presence in Asia to counter China's growing military strength.

Taiwan


- 52% of Americans (down from 53% in 2012 and 60% in 2007) do not support U.S. military intervention in the event a declaration of independence by Taiwan provokes Chinese military action.

Note: Complete datasets and additional analyses available at Committee100.org

4.1 WHAT ARE THE MOST LIKELY SOURCES OF CONFLICT BETWEEN THE U.S. AND CHINA IN THE NEAR FUTURE?

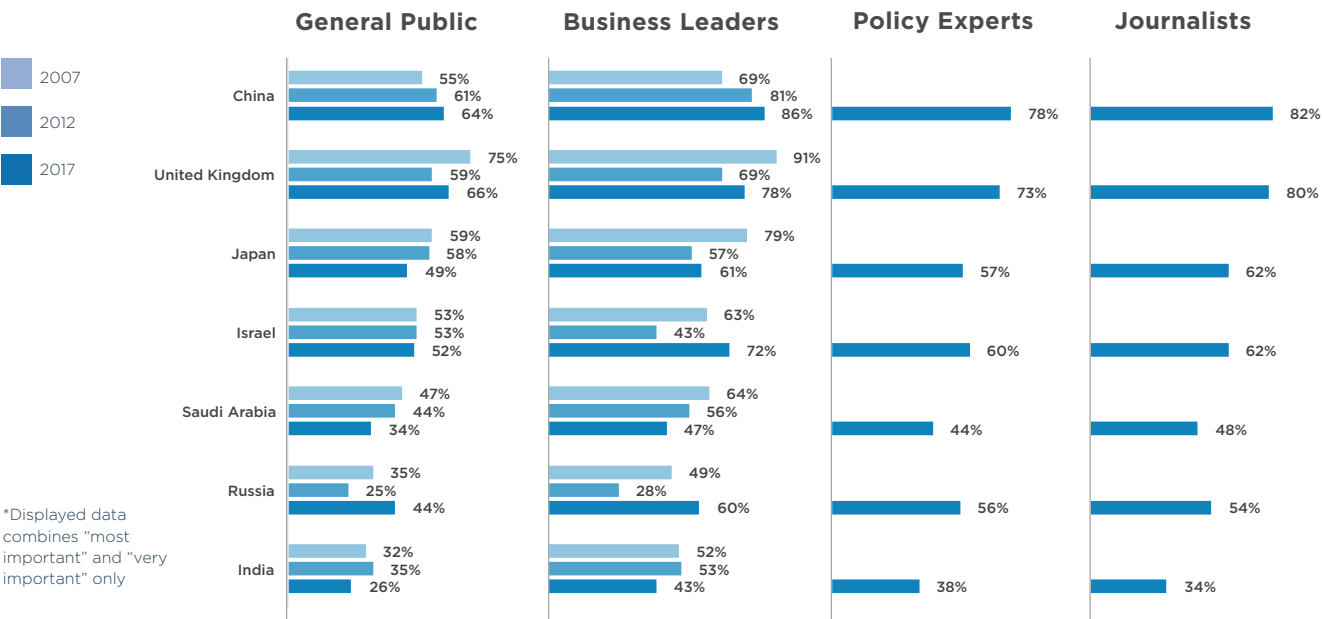



4.2 WHO ARE THE MOST IMPORTANT PARTNERS TO THE U.S. AND CHINA?



U.S. QUESTION:

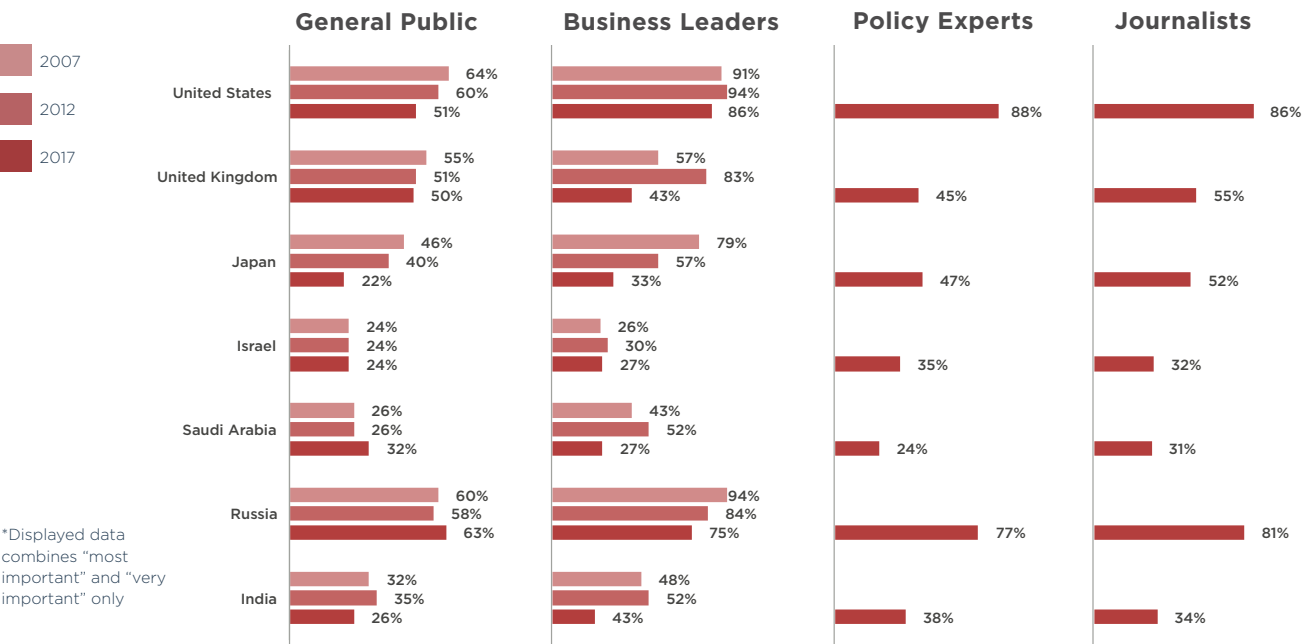
I am going to read to you a list of countries. For each, please tell me if they are the most important, very important, somewhat important, or not an important partner to the U.S. in the world today.





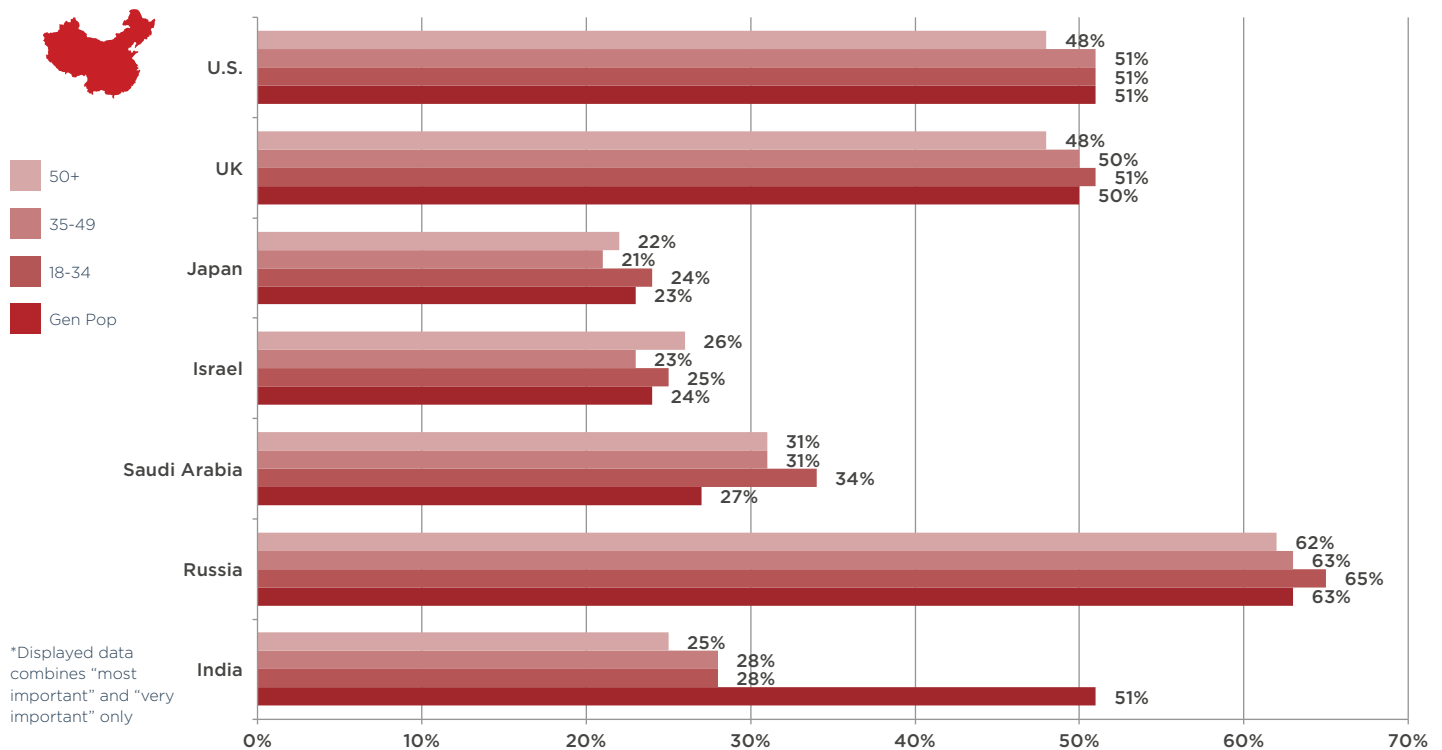
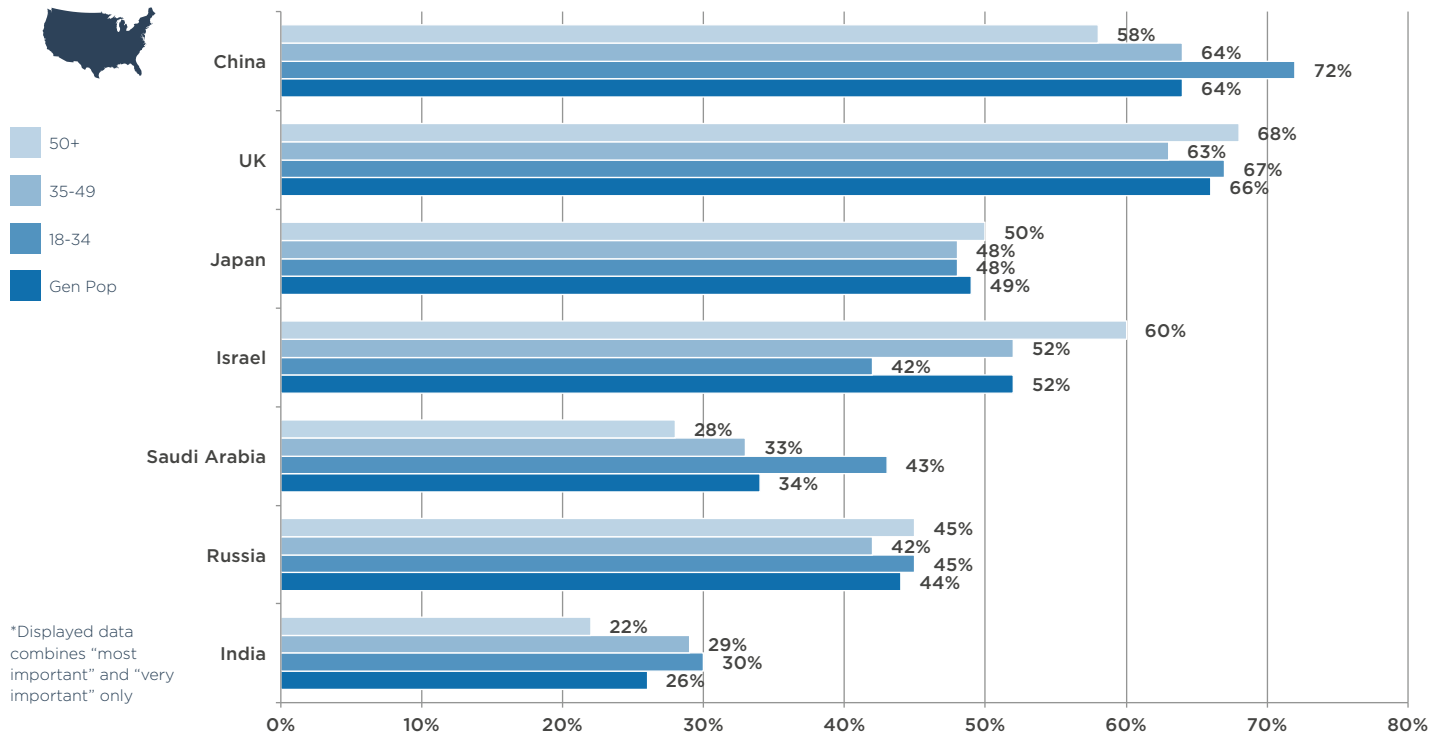
CHINA QUESTION:

I am going to read to you a list of countries. For each, please tell me if they are the most important, very important, somewhat important, or not an important partner to China in the world today.



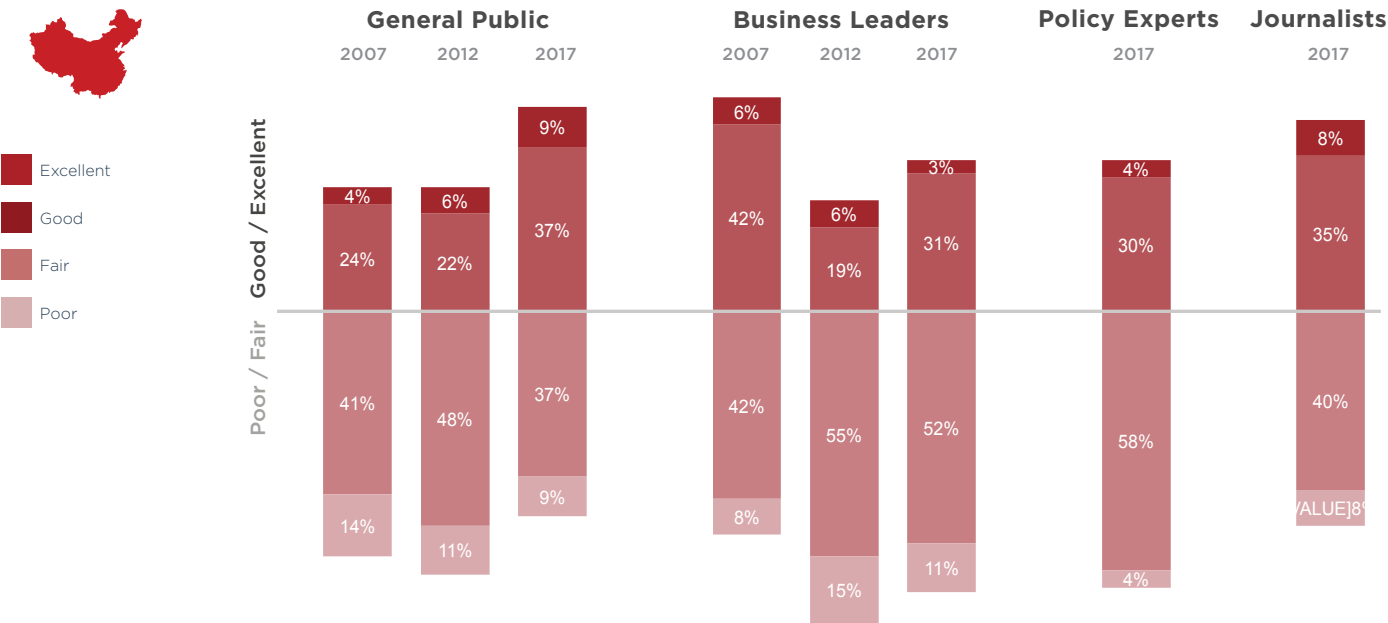
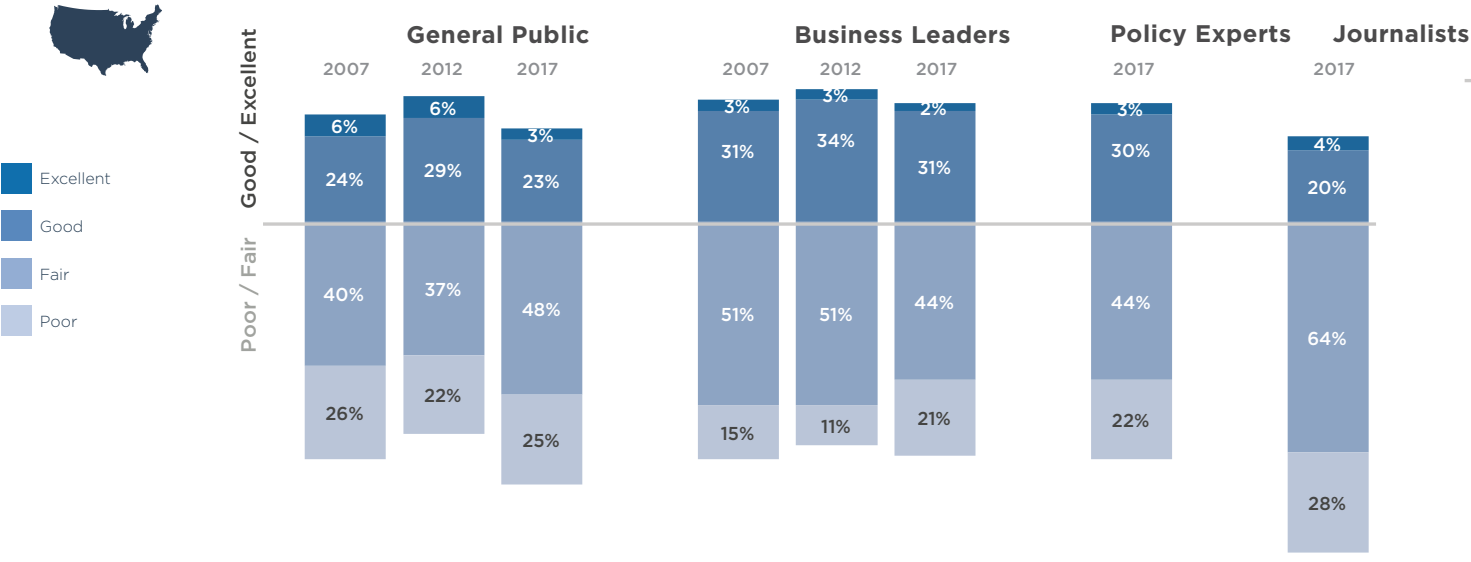
4.2 WHO ARE THE MOST IMPORTANT PARTNERS TO THE U.S. AND CHINA? (CONTINUED)

2017 GENERAL PUBLIC AGE BREAKDOWN



4.3 HOW WOULD YOU RATE THE U.S. GOVERNMENT’S HANDLING OF RELATIONS WITH CHINA?

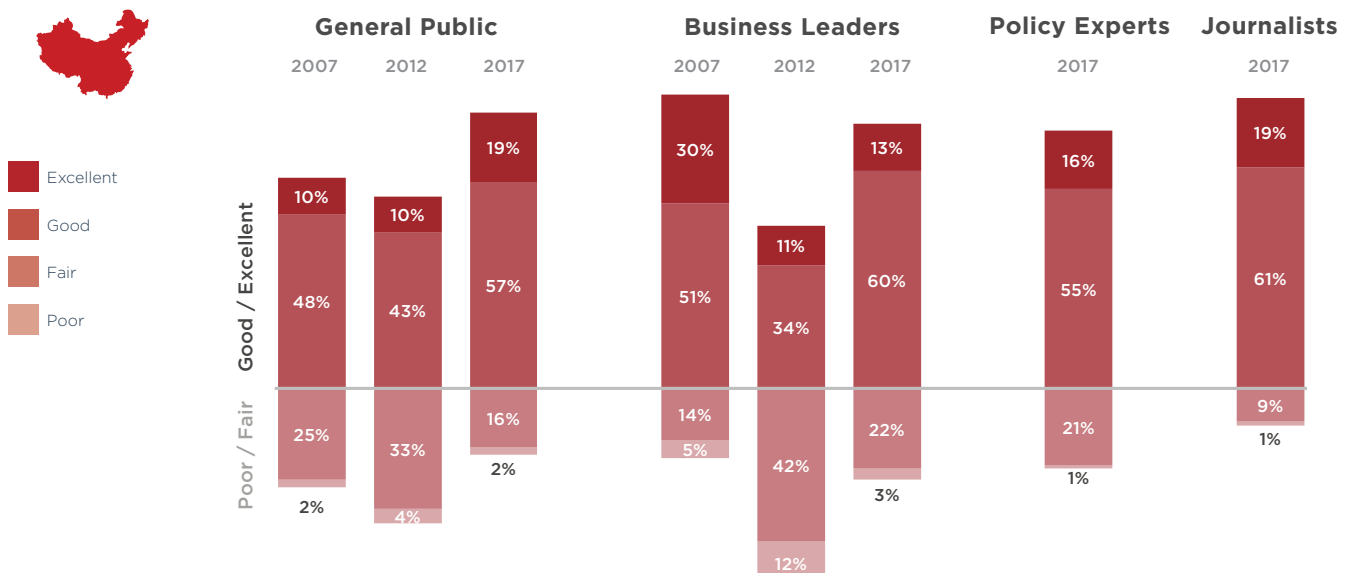
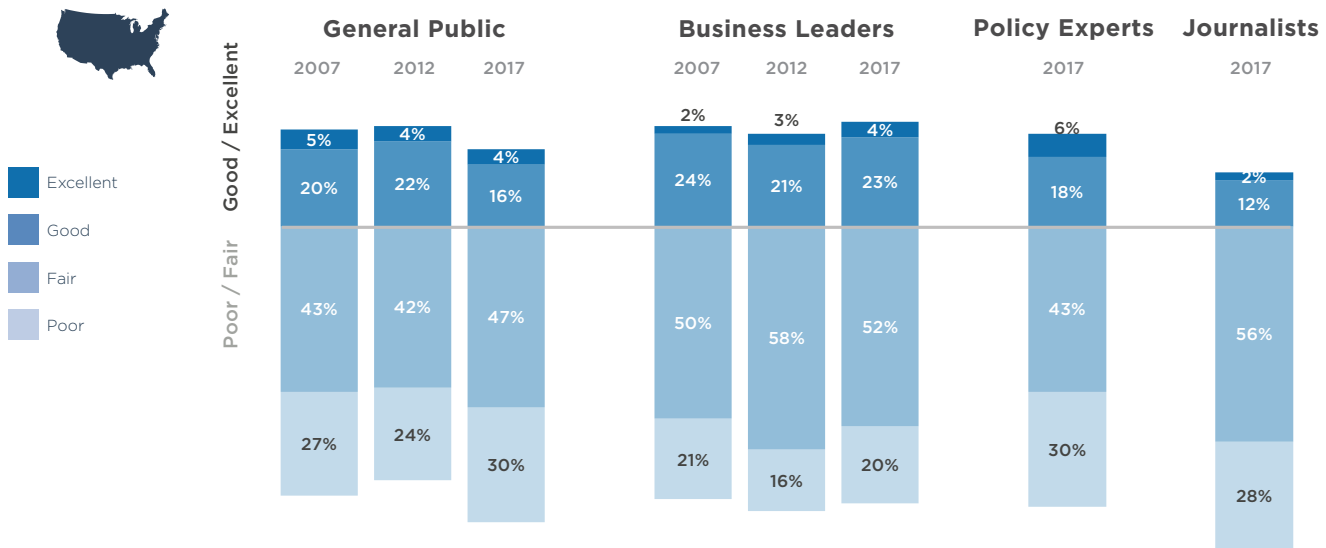
BASE QUESTION:
How would you rate the U.S. government’s handling of its relations with China?



4.4 HOW WOULD YOU RATE THE CHINESE GOVERNMENT'S HANDLING OF RELATIONS WITH THE U.S.?

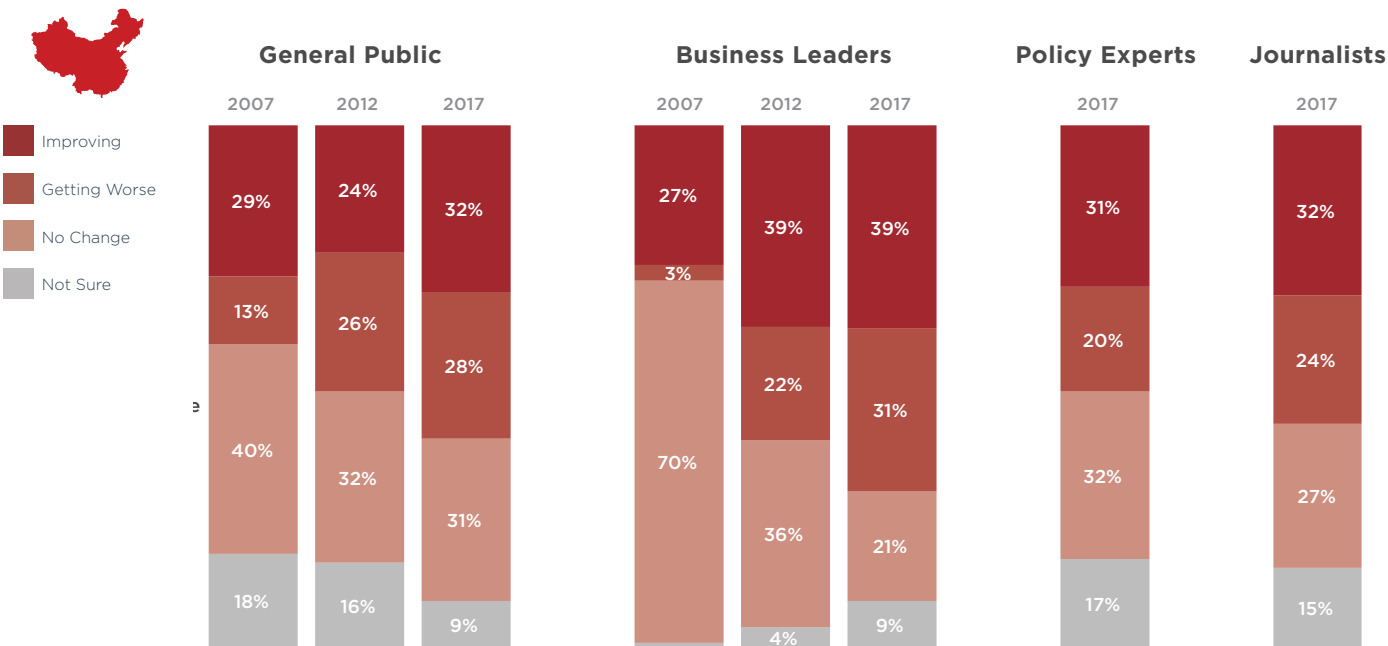
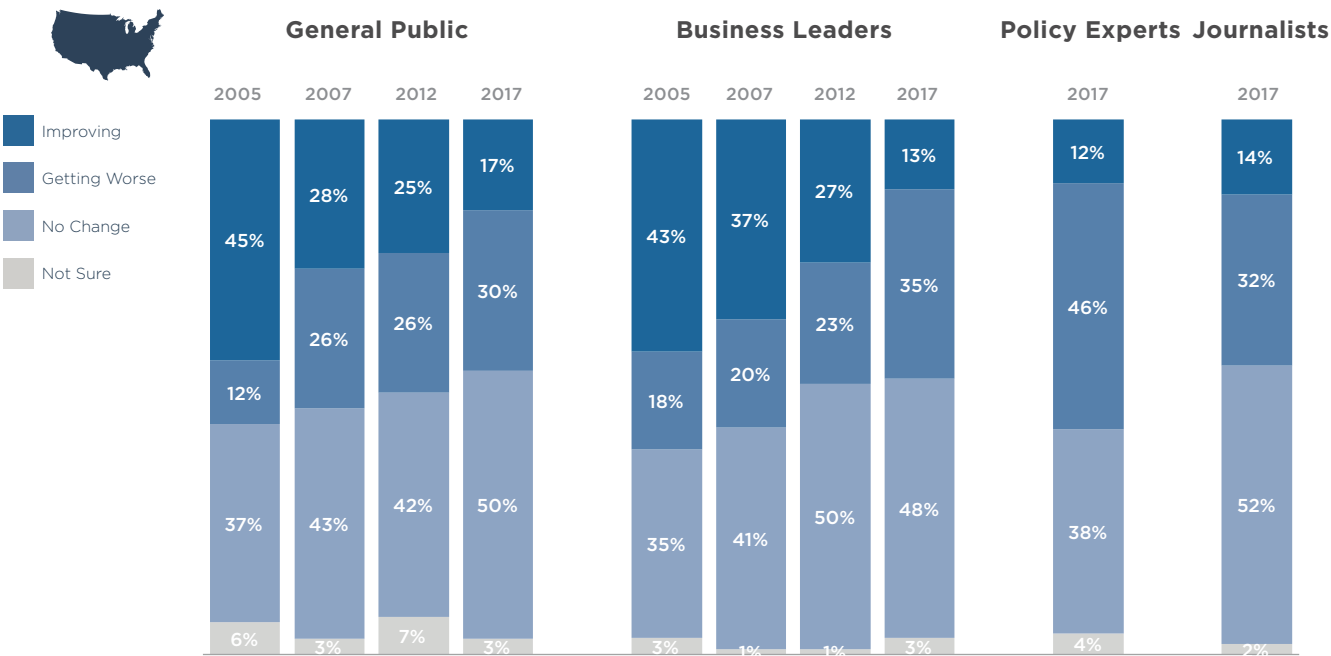
BASE QUESTION:

How would you rate Chinese government's handling of its relations with the U.S.?



4.5 ARE U.S.-CHINA RELATIONS IMPROVING OR GETTING WORSE?

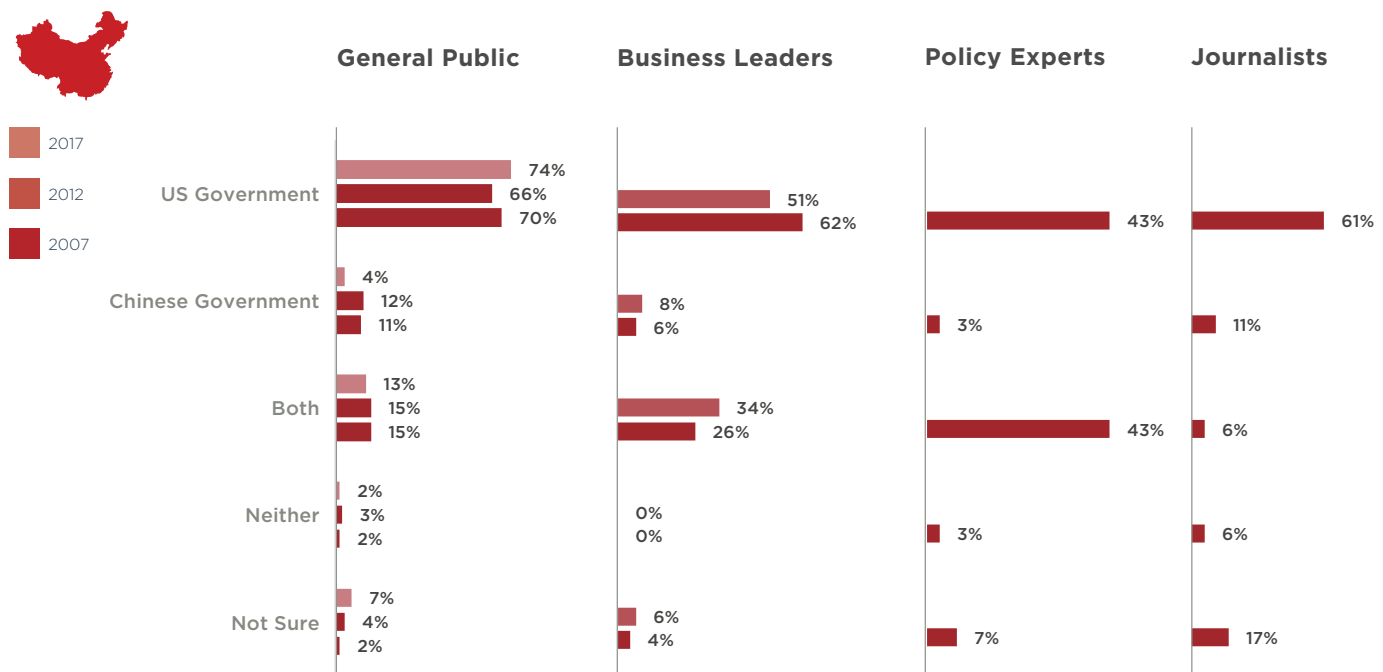
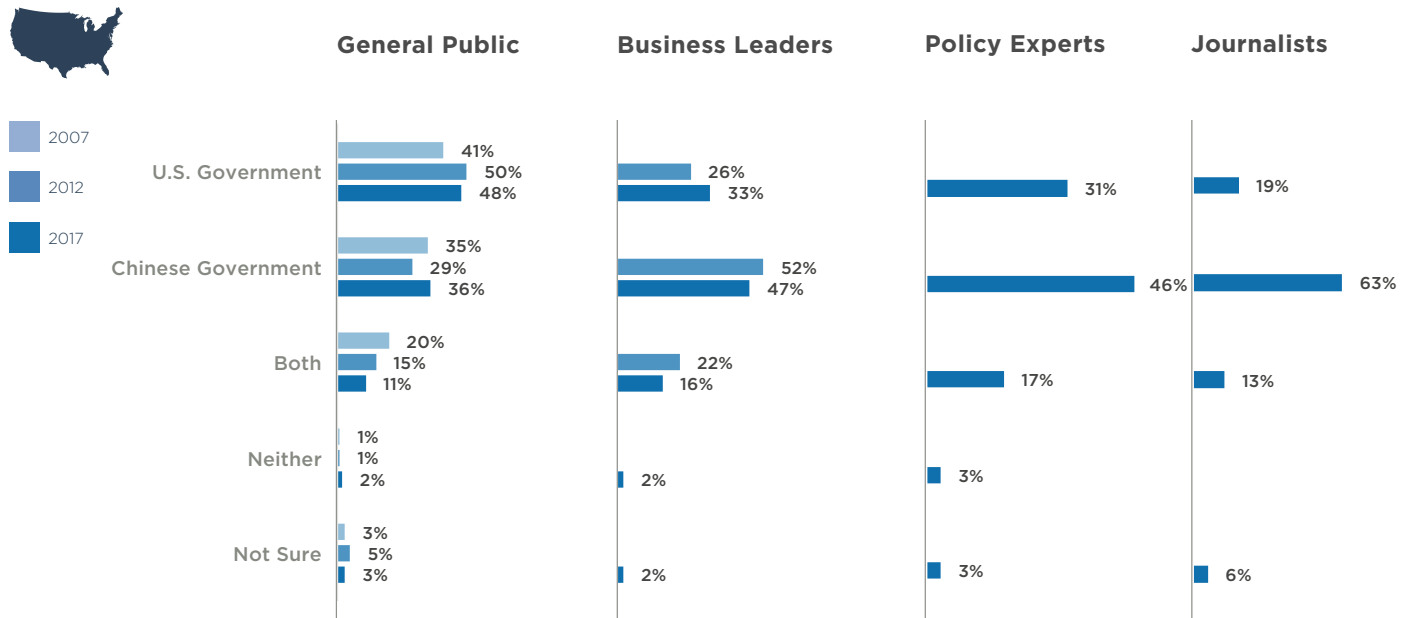
BASE QUESTION:
Do you believe that the relationship between the U.S. and China is currently improving, getting worse, or is there no change?



4.6 IS THE U.S. OR CHINA MORE RESPONSIBLE FOR DETERIORATION IN BILATERAL RELATIONS?

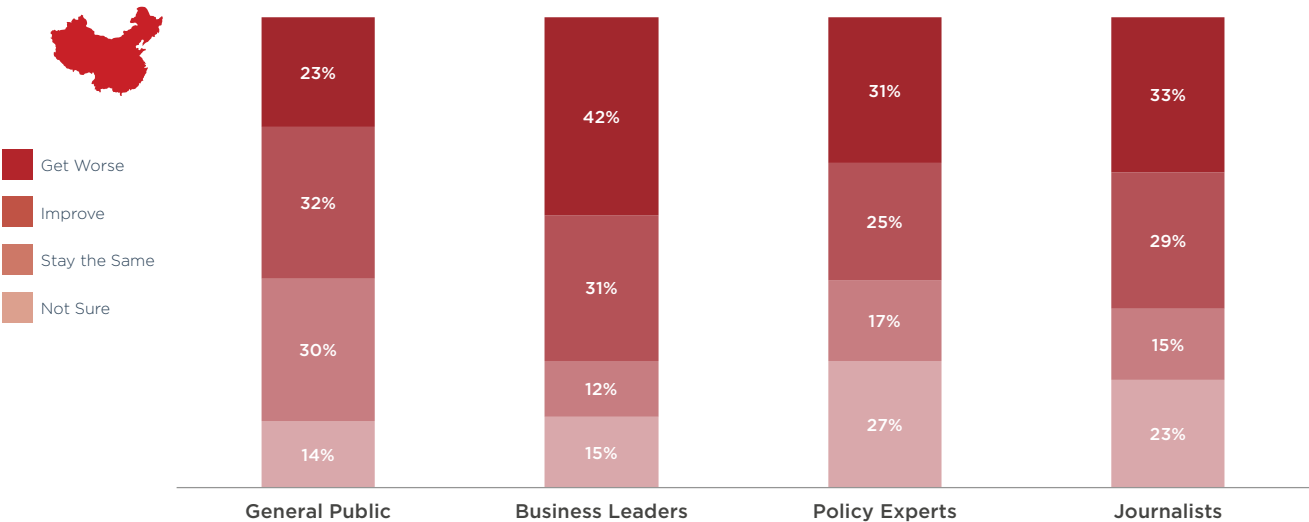
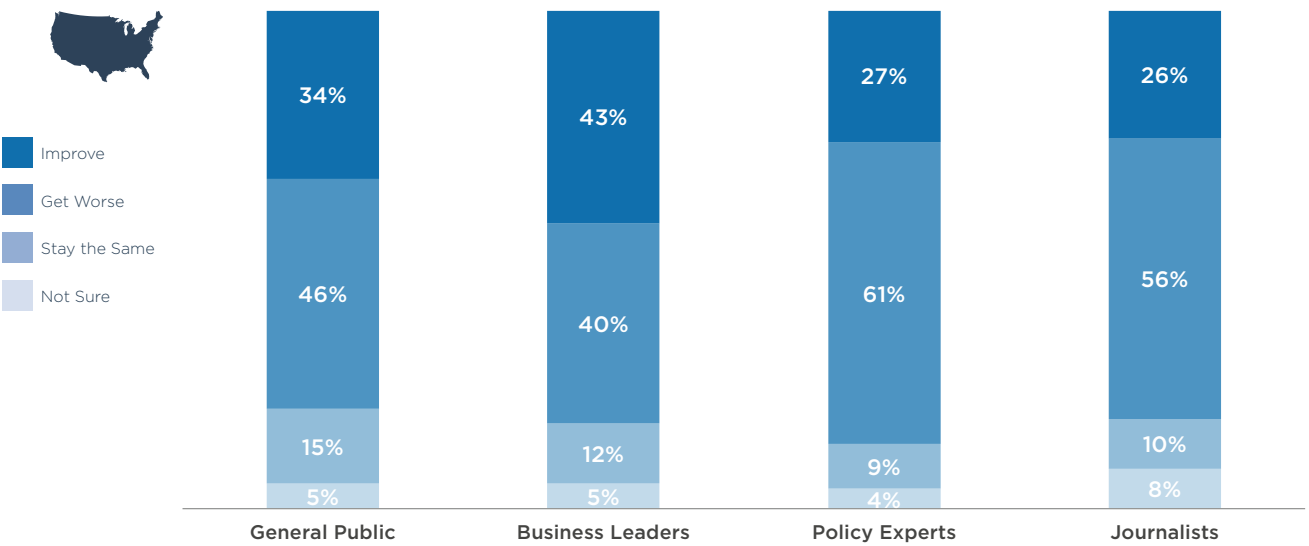
BASE QUESTION:

Who do you think is most responsible for the deterioration in U.S.-China relations - The U.S. government or the Chinese government?



4.7 WILL U.S.-CHINA RELATIONS IMPROVE OR GET WORSE UNDER THE TRUMP ADMINISTRATION?

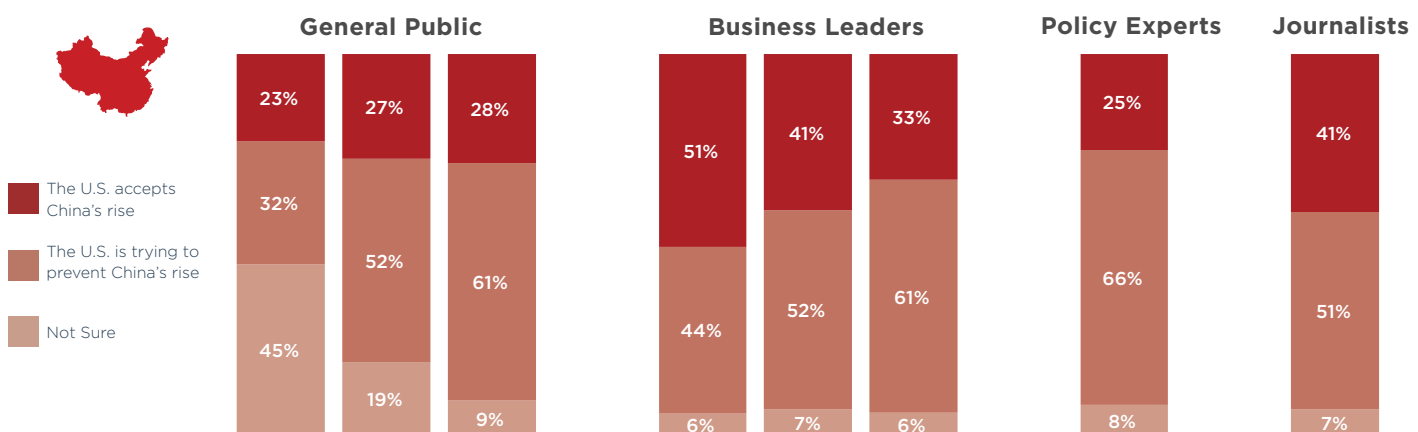
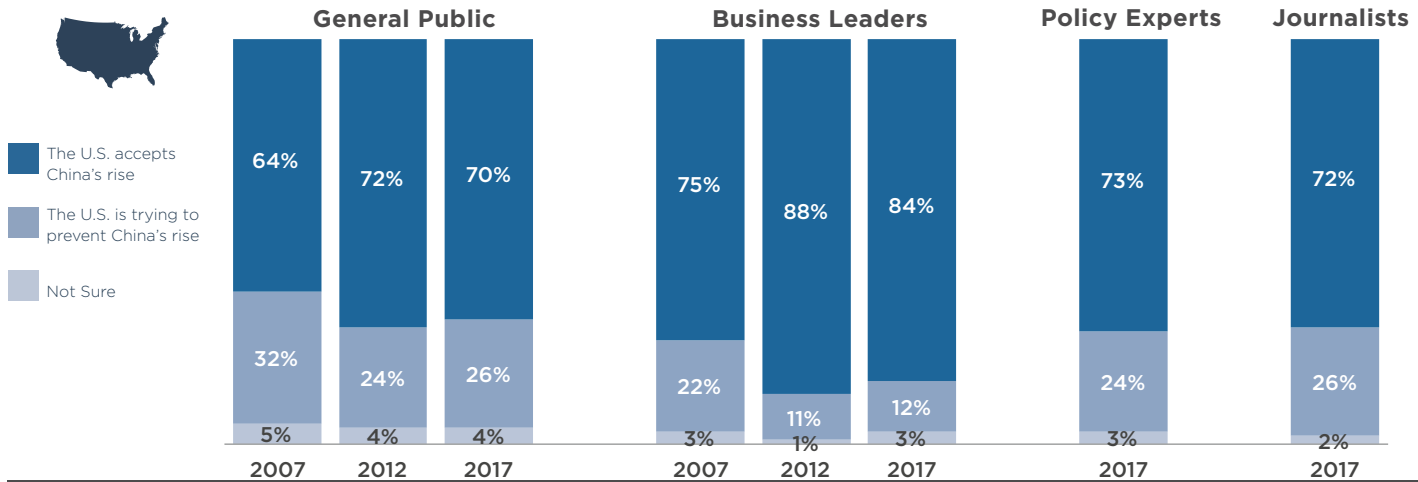
BASE QUESTION:
Do you believe the relationship will improve, get worse, or stay the same under the Trump Administration in the U.S.?



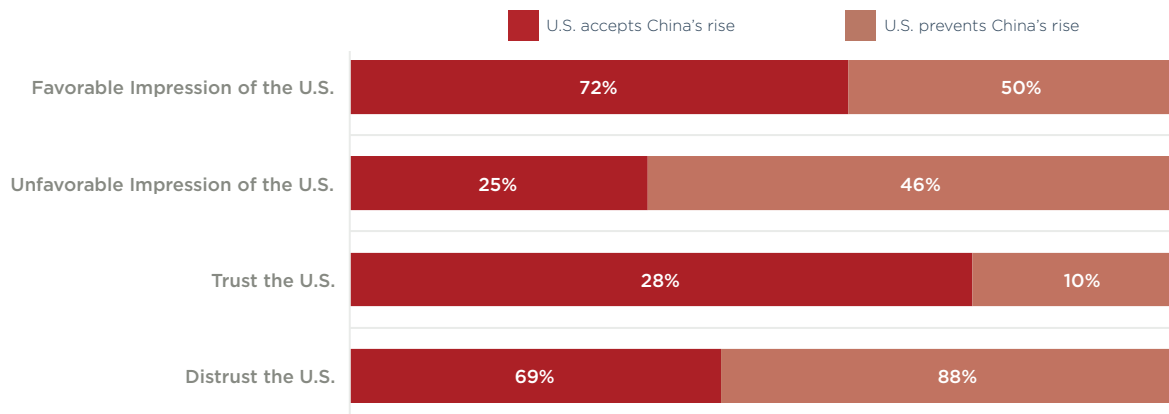
4.8 IS THE U.S. TRYING TO PREVENT CHINA'S RISE?

BASE QUESTION:

I will now read two statements. Please tell me which comes closest to your view: The U.S. accepts China's status as a rising power and wants a collaborative relationship OR The U.S. is trying to prevent China from becoming a great power.

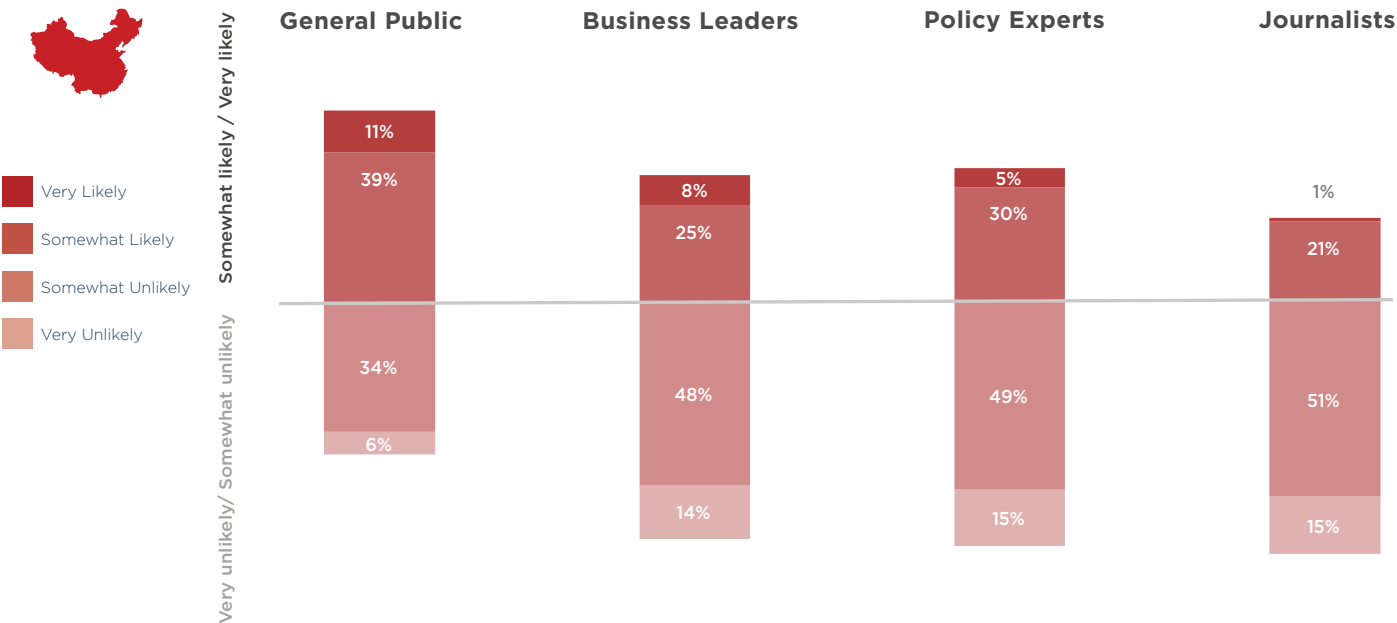
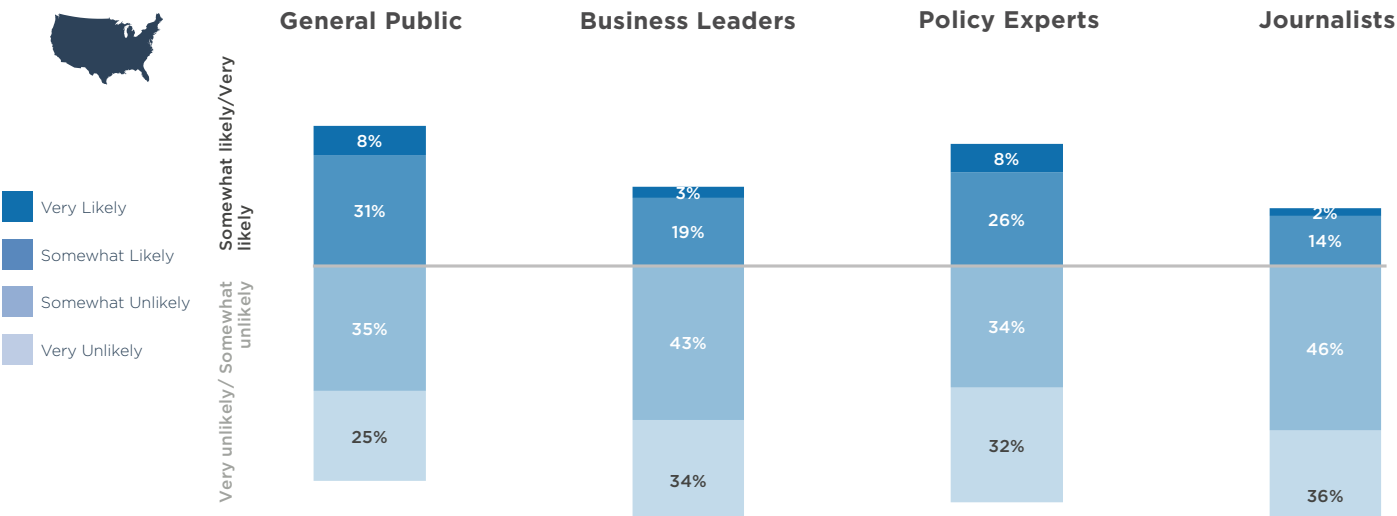


IMPACT OF CHINESE PUBLIC'S PERCEPTIONS ON FAVORABILITY AND TRUST 2017



4.9 HOW LIKELY IS MILITARY CONFLICT BETWEEN CHINA & THE U.S. IN THE NEXT DECADE?

BASE QUESTION:
How likely is a military conflict involving the U.S. and China in the next ten years - very likely, somewhat likely, somewhat unlikely, or very unlikely?

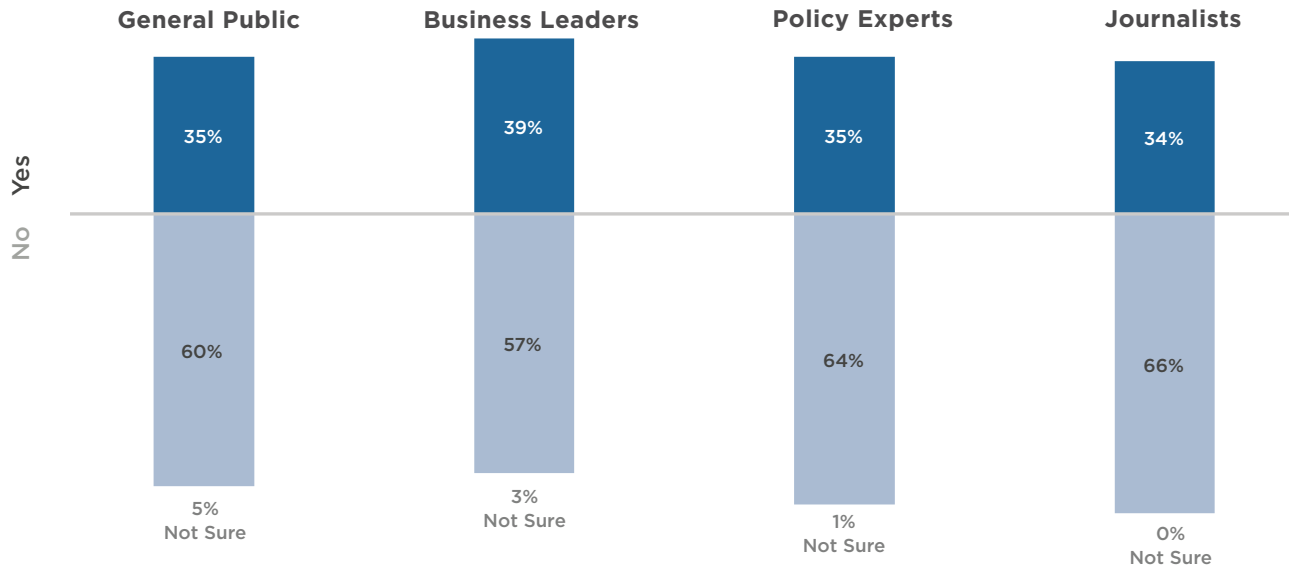


4.10 SHOULD AMERICA INCREASE ITS MILITARY PRESENCE IN ASIA TO COUNTER CHINA'S GROWING MILITARY?

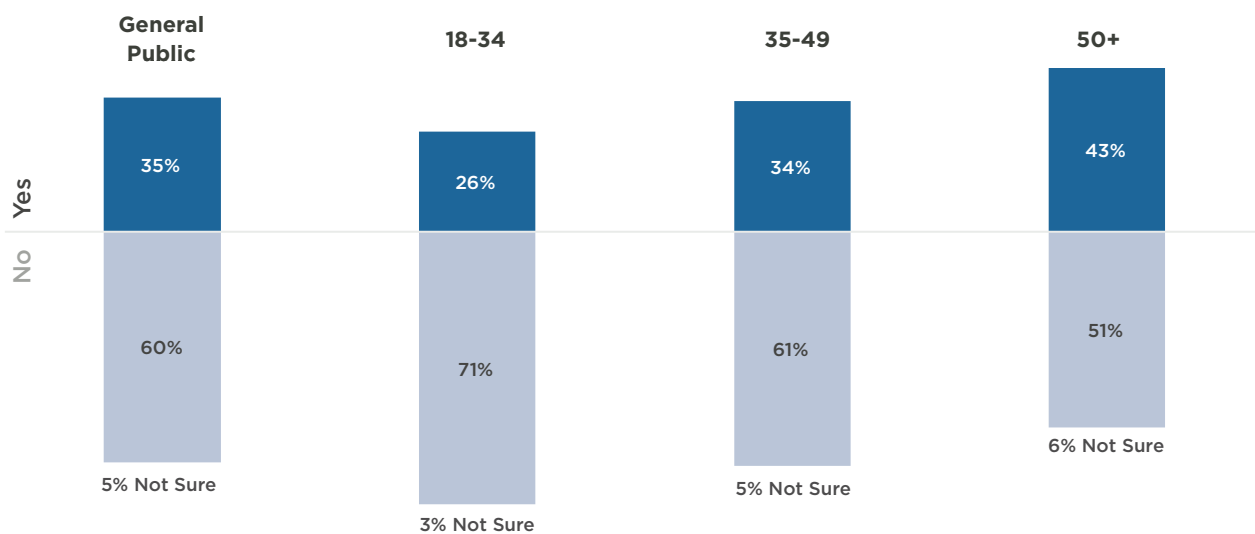


U.S. QUESTION:

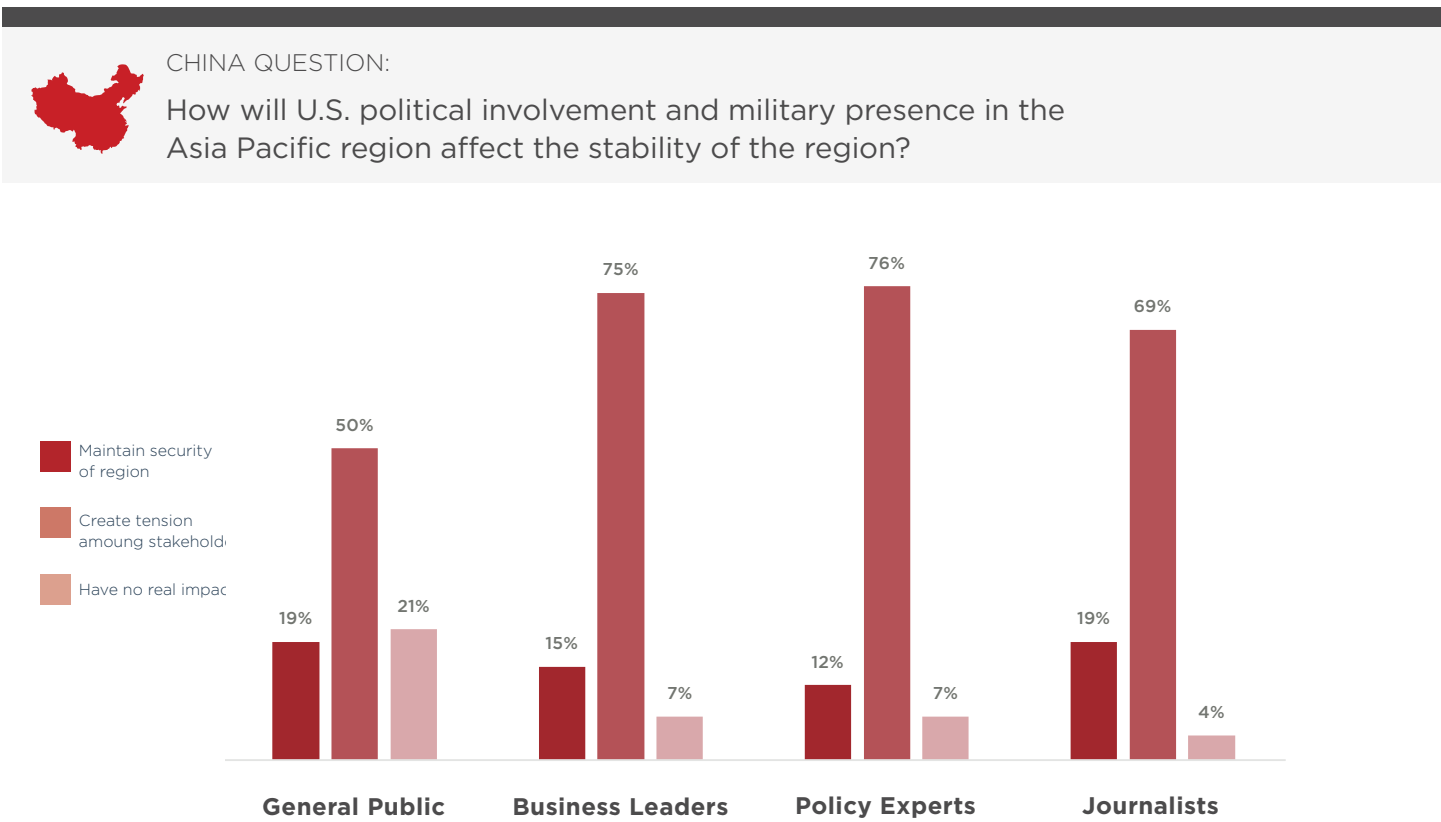
Should the U.S. increase its military presence in Asia to counter China's growing military strength?



2017 U.S. GENERAL PUBLIC AGE BREAKDOWN



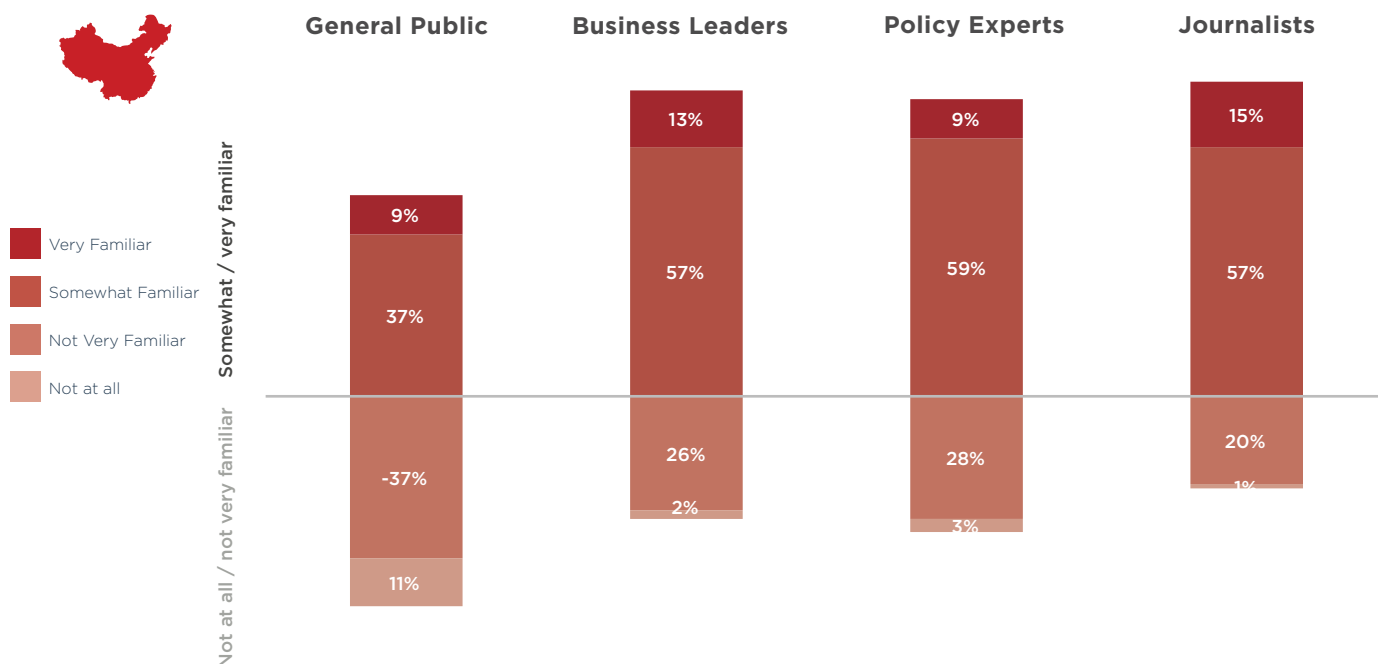
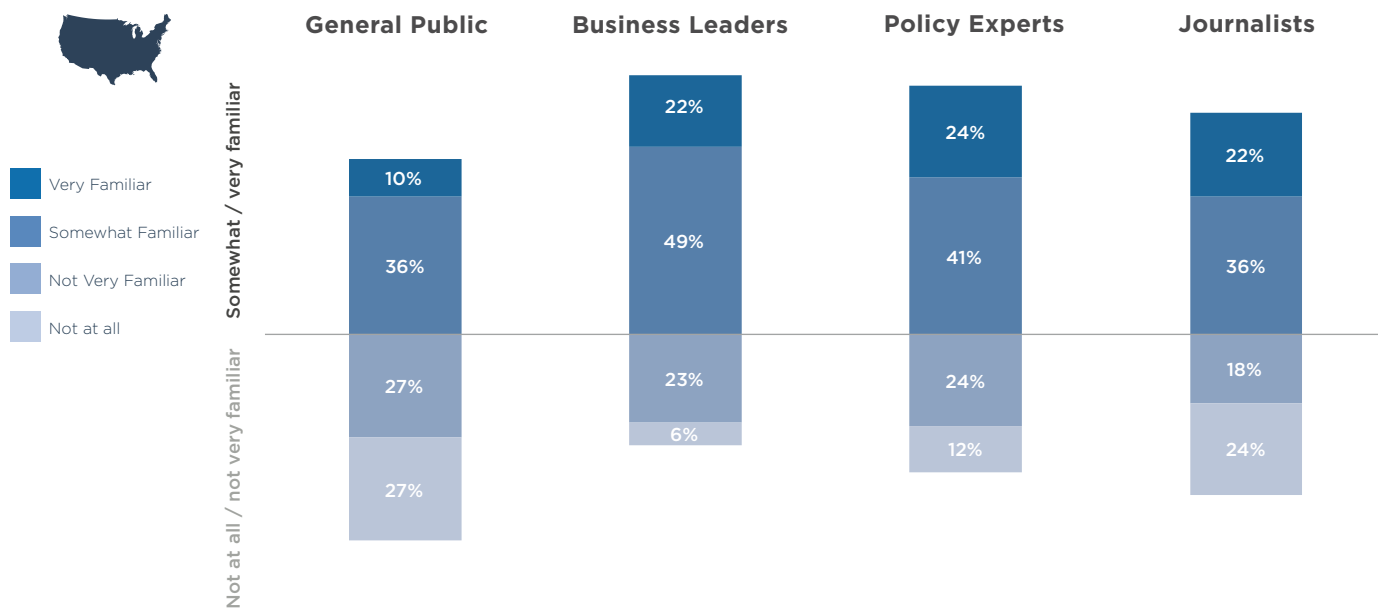
4.11 HOW WILL U.S. POLITICAL AND MILITARY PRESENCE IN THE ASIA PACIFIC AFFECT THE REGION'S STABILITY?



4.12 HOW FAMILIAR ARE YOU WITH TERRITORIAL ISSUES IN THE SOUTH CHINA SEA?

BASE QUESTION:

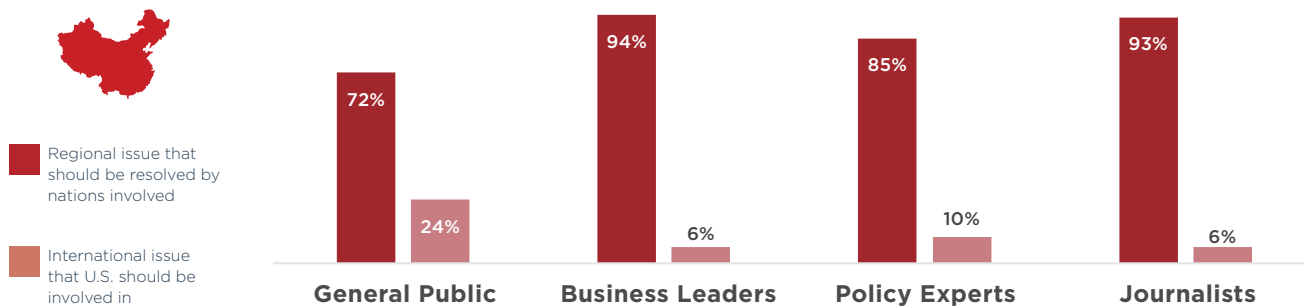
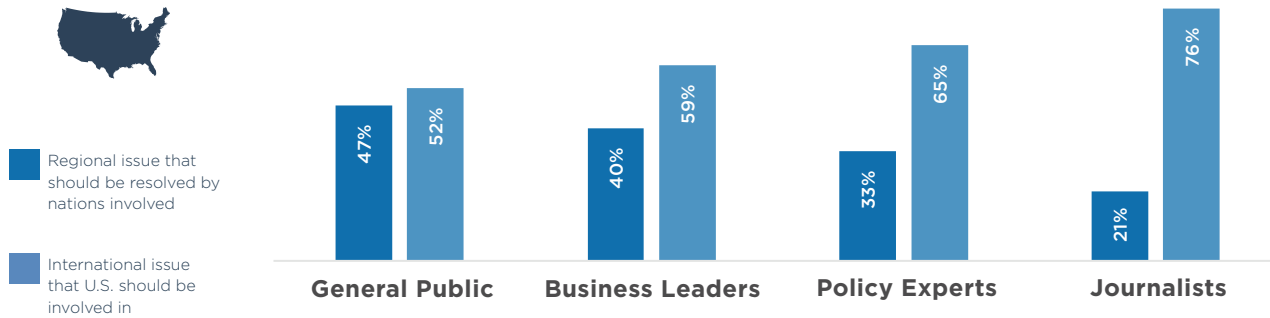
How familiar are you with the current situation in the South China Sea where China, Vietnam, the Philippines and several other Asian countries have overlapping claims in the resource-rich sea?



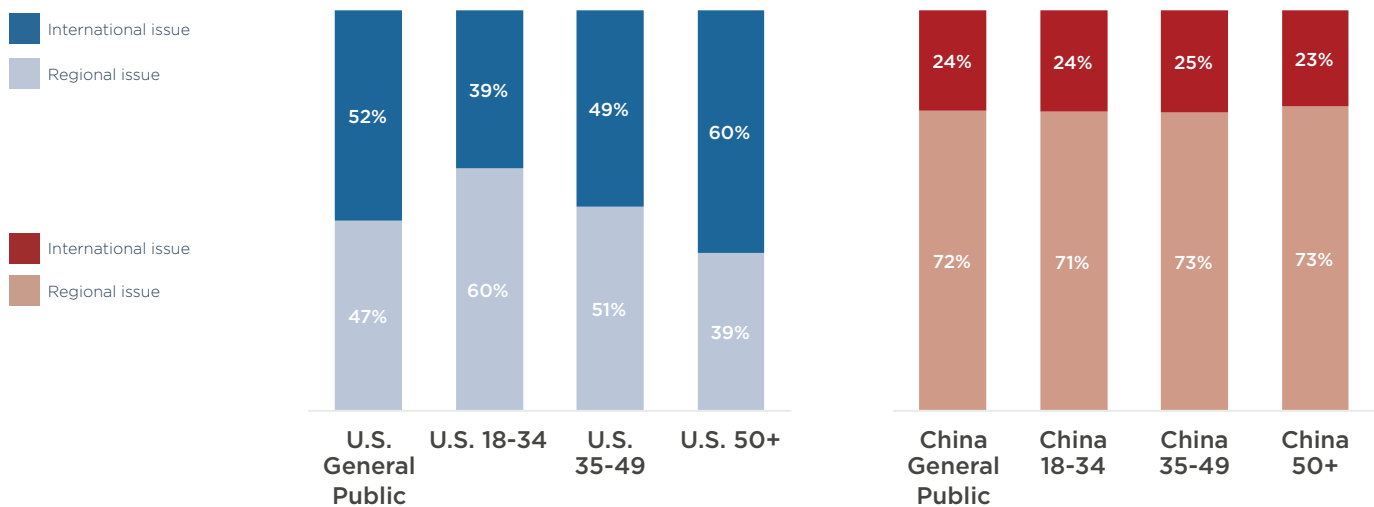
4.13 IS THE SOUTH CHINA SEA A REGIONAL ISSUE OR INTERNATIONAL ISSUE?

BASE QUESTION:

Do you believe that the situation in the South China Sea is a regional issue that should be resolved by the nations that are involved, or is it an international issue that the U.S. should be involved in?



2017 GENERAL PUBLIC AGE BREAKDOWN

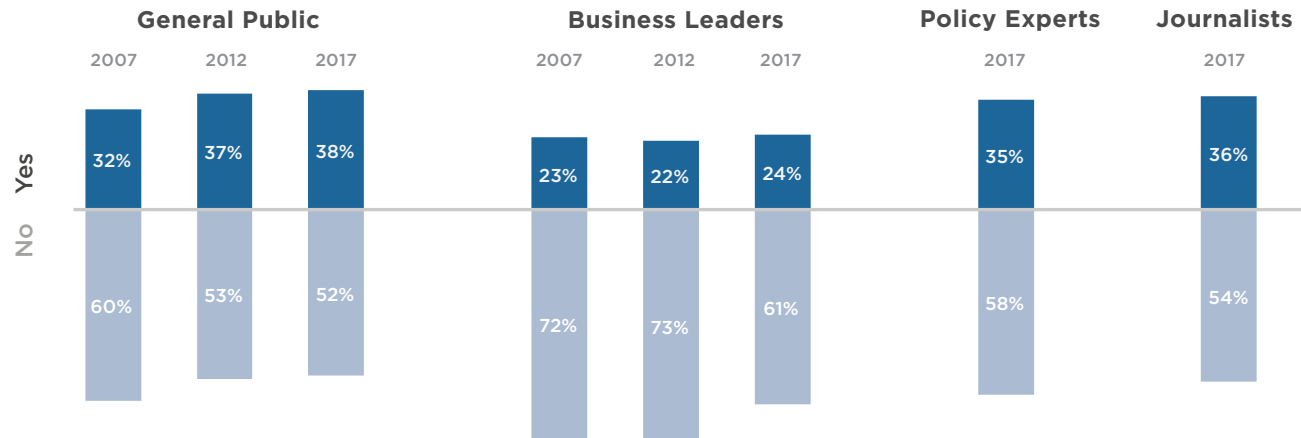


4.14 SHOULD THE U.S. INTERVENE IN TAIWAN-CHINA CONFLICT?



U.S. QUESTION:

If a declaration of independence by Taiwan leads to military hostilities with China, do you think the American public should support U.S. military intervention?



V. ECONOMICS, TRADE, AND INVESTMENT

HIGHLIGHTS

Trade Benefits and Issues

- Both Americans (81%) and Chinese (83%) agree that trade with China is beneficial to the U.S. economy. Both Americans (75%) and Chinese (74%) also agree that products from China benefit American consumers.
- 59% of the American public thinks that imposing tariffs on Chinese imported goods will have a positive impact on the U.S. This same view is echoed by more than half of Chinese influencers, but fewer than half of American influencers agree.

Job Losses

- Chinese and Americans disagree as to whether China causes job losses in the U.S.: 73% of the U.S. public thinks that China causes job losses in the U.S. compared to only 39% of the Chinese public. 74% of the U.S. public thinks the U.S. should not outsource manufacturing jobs to China even if eliminating outsourcing results in higher prices for U.S. consumers.

Investments

- Overall sentiment is positive about U.S.-China bilateral investments. More than 60% of U.S. influencers agree that U.S.-China bilateral investment will improve the U.S.-China relationship, stimulate both economies, help create jobs in the U.S., and lead to closer ties between the two superpowers, and also between American and Chinese regional and local governments.
- 54% of the American public thinks the U.S. should encourage Chinese investment in the U.S. 72% of American millennials feel the same way.

Business Practices in China

- Both Americans and Chinese business leaders share the same top two concerns about doing business with and in China: poor intellectual property rights protection, and bureaucratic interference.

Business Practices in the U.S.

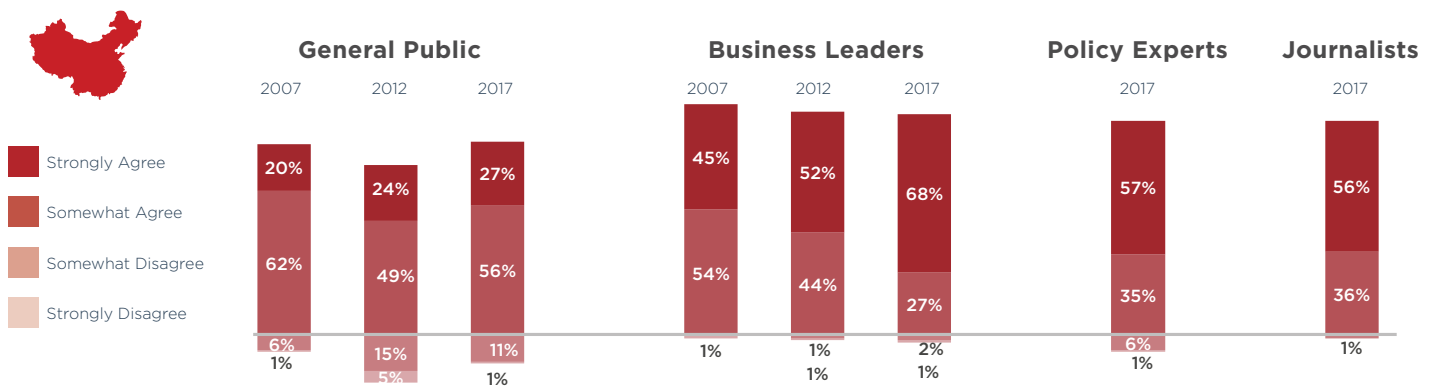
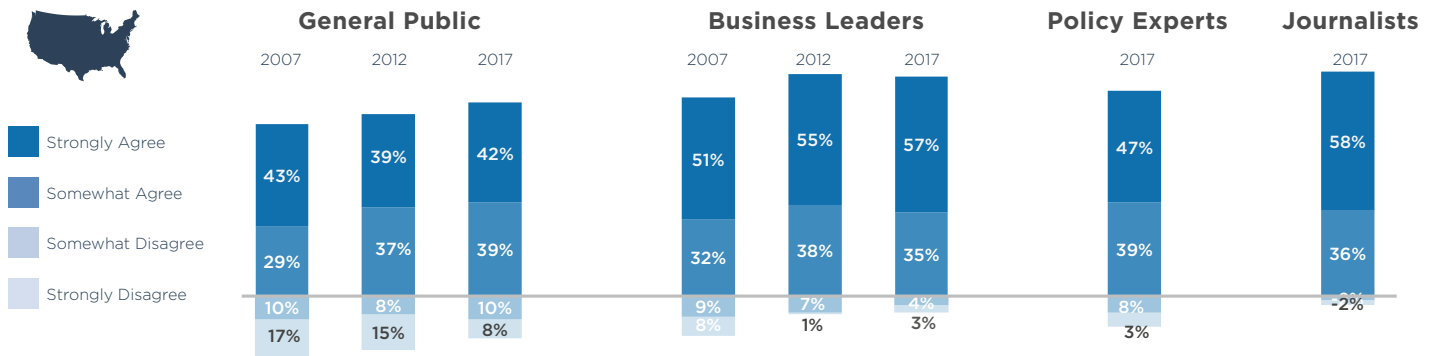
- Chinese business leaders' two greatest concerns about doing business with the U.S. are: U.S. import management measures (such as anti-dumping tariffs) and U.S. export management measures (such as restrictions on high-tech, military and sensitive materials' export). Another concern is the lack of knowledge of doing business in the U.S.

Note: Complete datasets and additional analyses available at Committee100.org

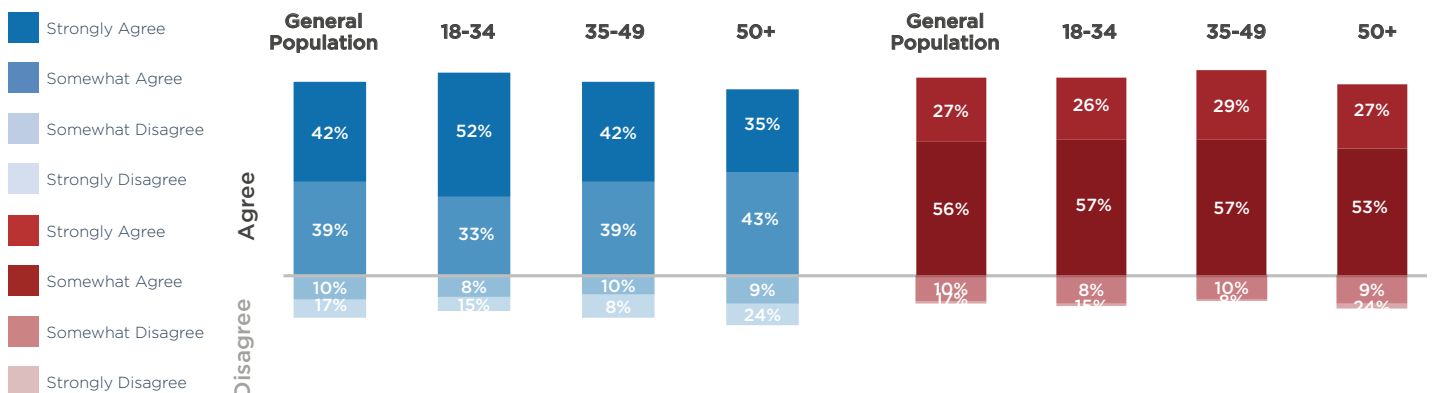
5.1 IS TRADE WITH CHINA BENEFICIAL TO THE U.S. ECONOMY?

BASE QUESTION:

I am going to read you a series of statements. For each, I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. The first statement is Trade with China is beneficial to the U.S. economy.



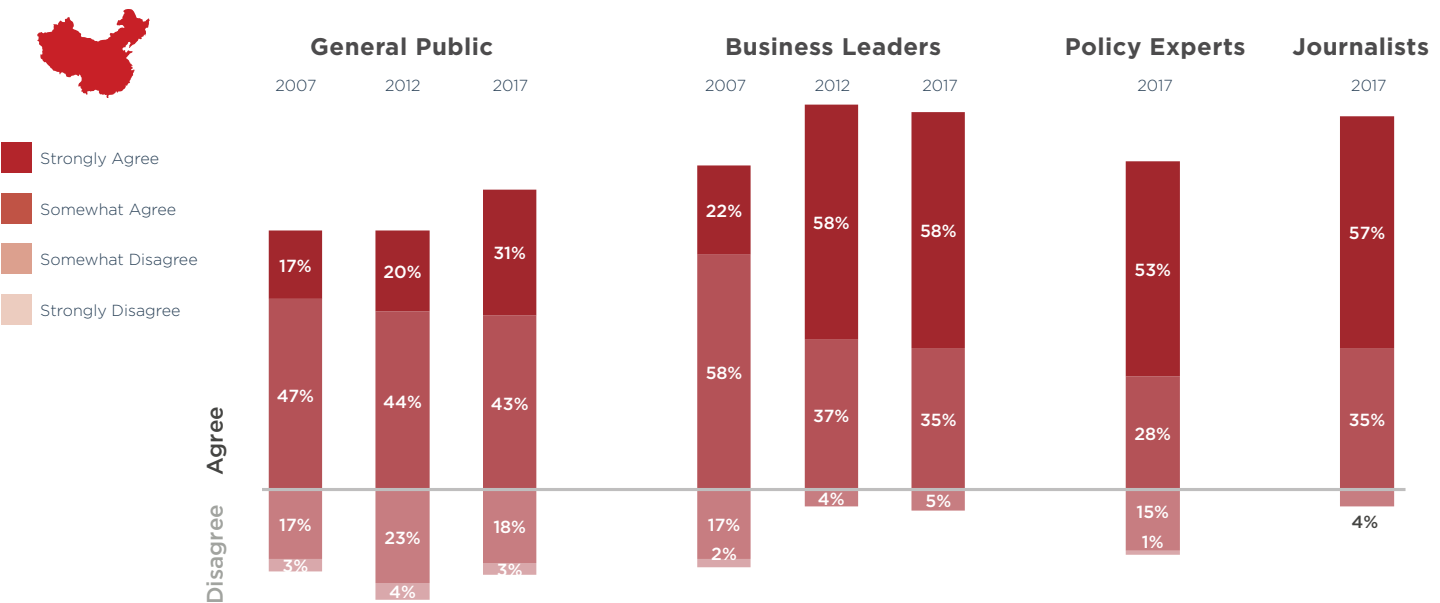
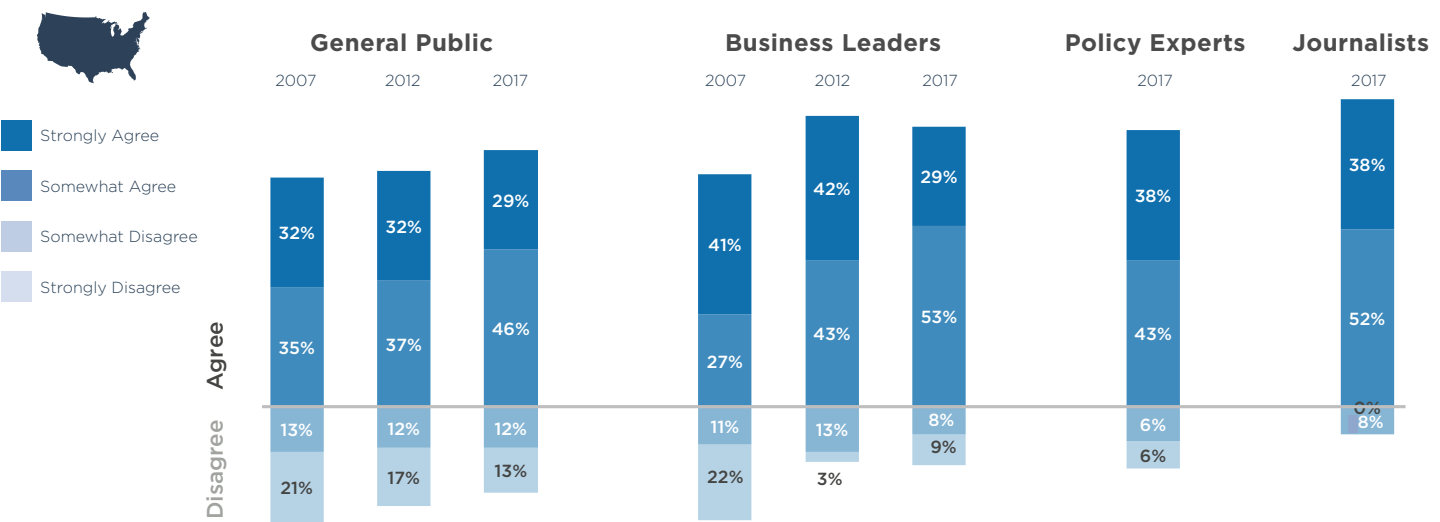
GENERAL PUBLIC AGE BREAKDOWN



5.2 DO PRODUCTS FROM CHINA BENEFIT AMERICAN CONSUMERS?

BASE QUESTION:

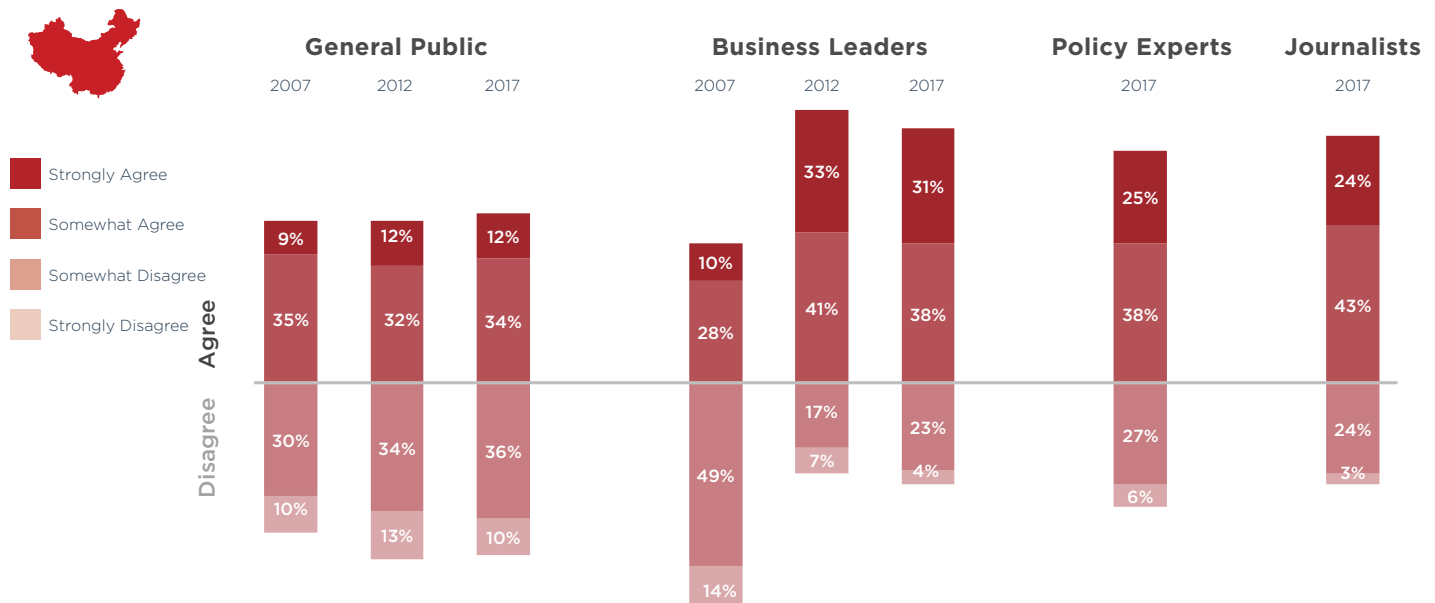
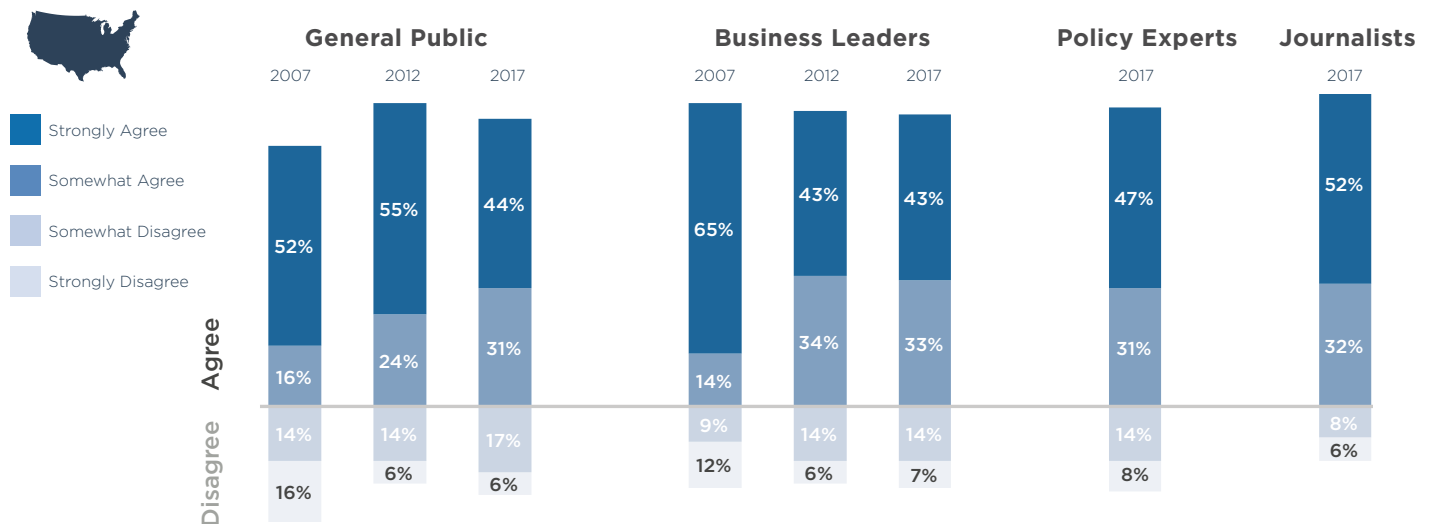
I am going to read you a series of statements. For each, I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. The next statement is Products from China benefit American consumers.



5.3 HAVE CHINESE TAINTED FOOD AND UNSAFE TOY CASES REDUCED YOUR CONFIDENCE IN PRODUCTS MADE IN CHINA?

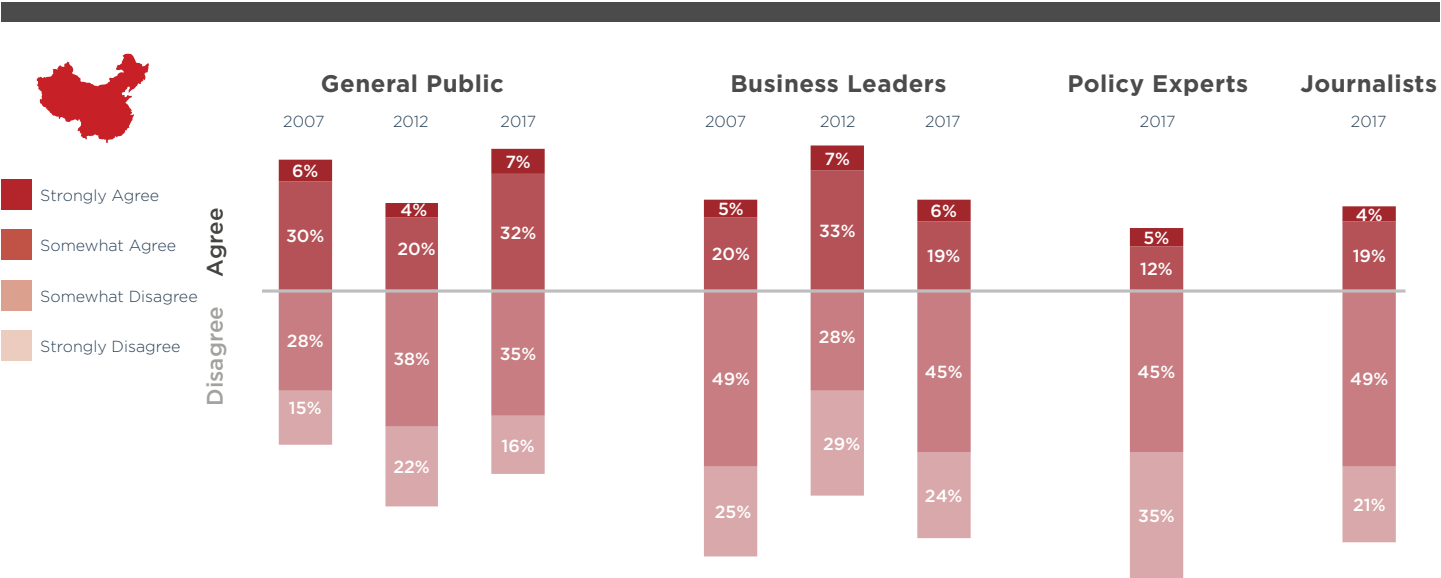
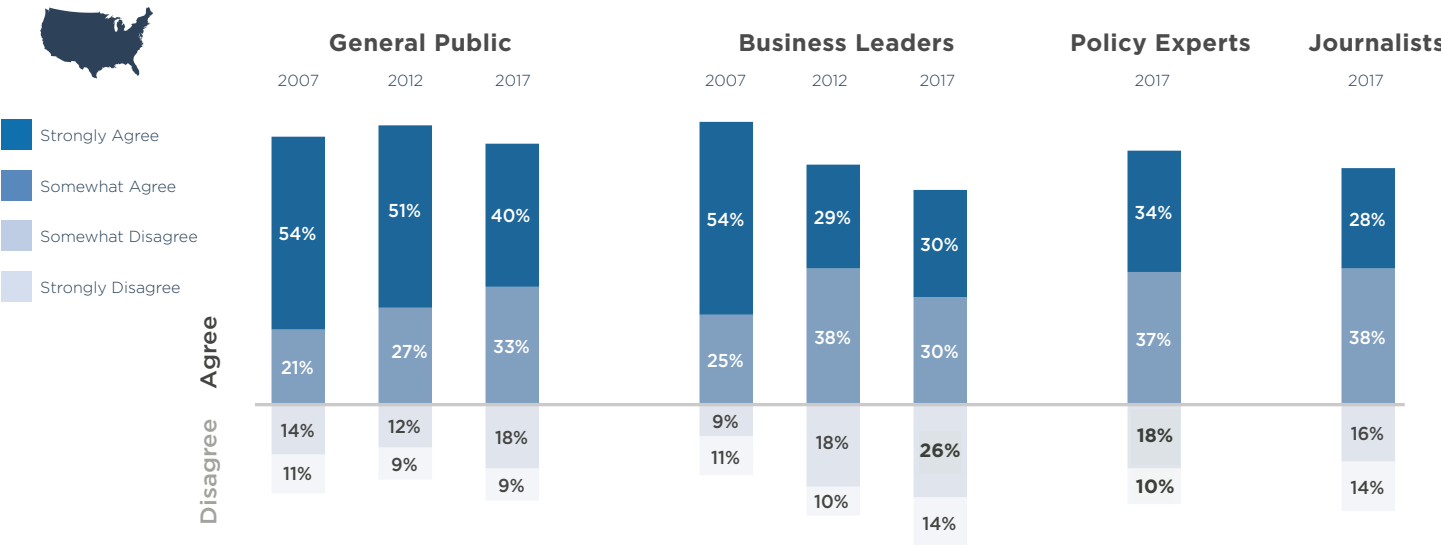
BASE QUESTION:

I am going to read you a series of statements. For each, I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. The next statement is Chinese tainted food and unsafe toy cases have reduced your confidence in products made in China.



5.4 DOES CHINA CAUSE JOB LOSSES IN THE U.S.?

BASE QUESTION:
I am going to read you a series of statements. For each, I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. The next statement is China causes job losses in the U.S.

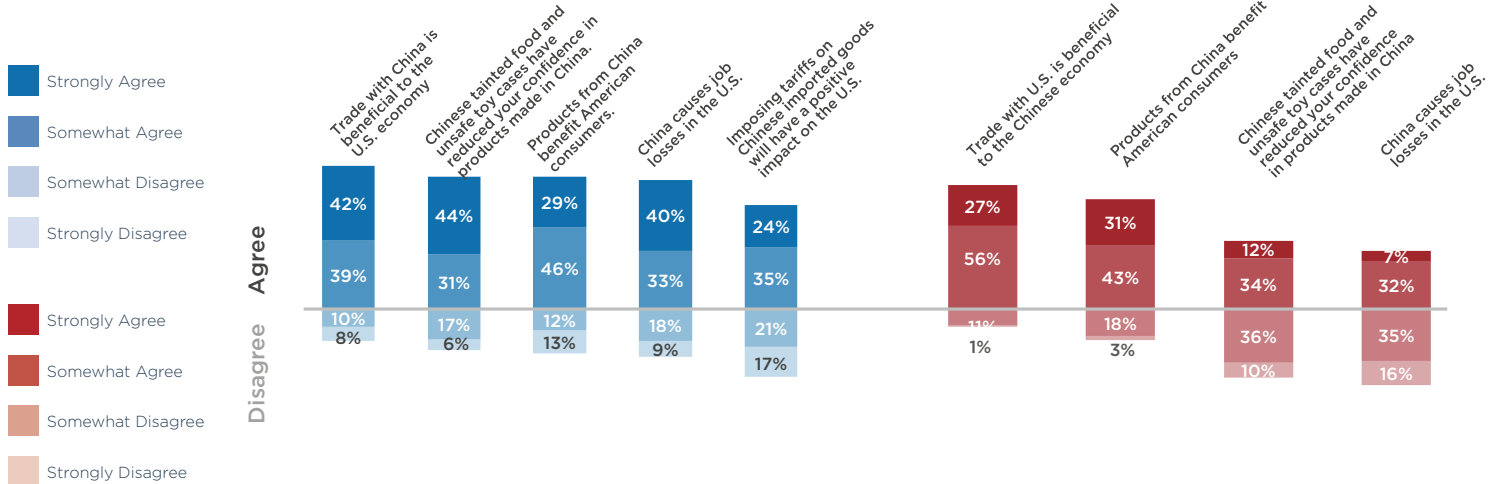


5.5 IS U.S.-CHINA TRADE BENEFICIAL OR HARMFUL TO YOUR COUNTRY'S PEOPLE AND ECONOMY?

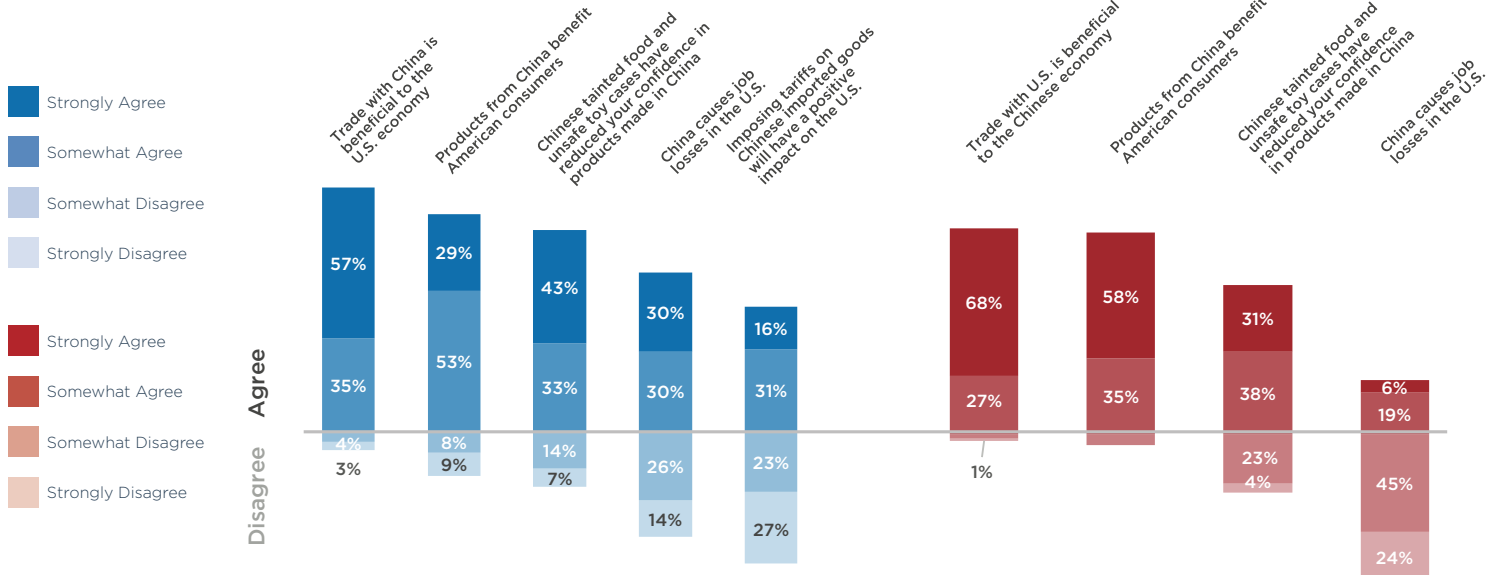
BASE QUESTION:

I am going to read you a series of statements. For each, I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.


General Public



Business Leaders

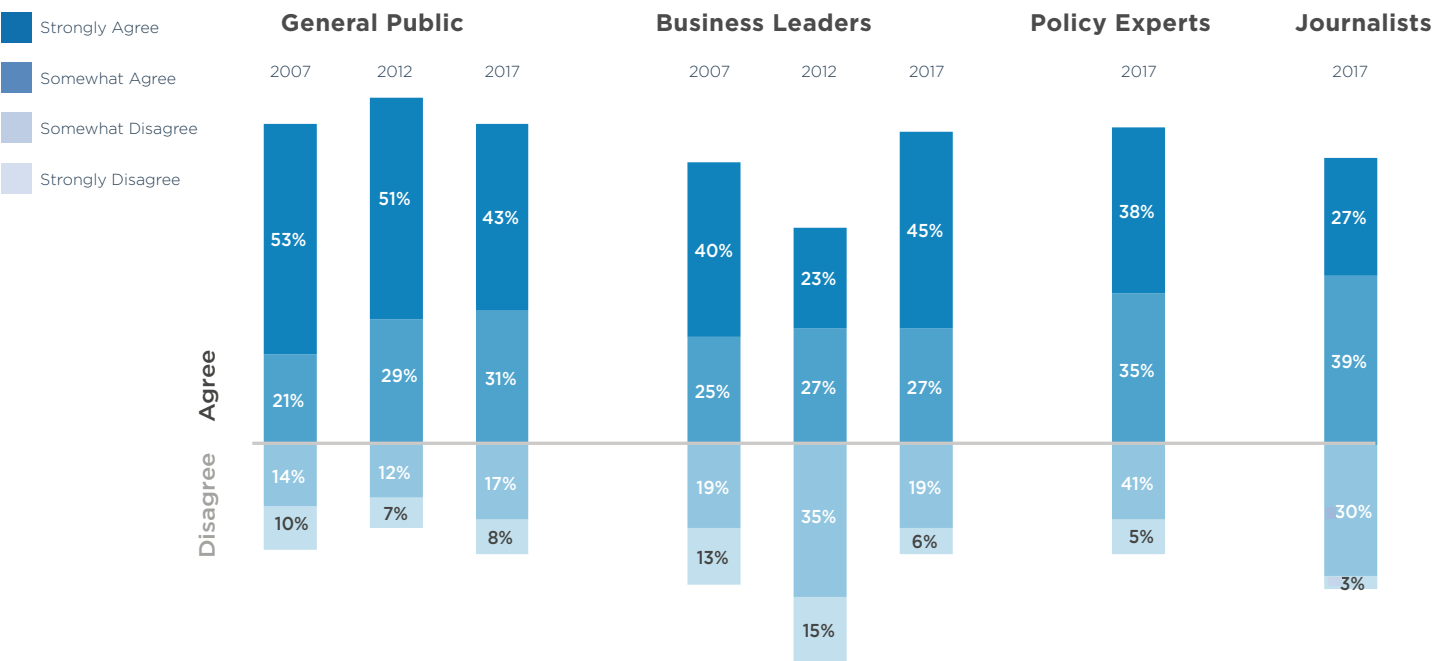


5.6 SHOULD THE U.S. STOP OUTSOURCING TO CHINA, EVEN IF PRICES INCREASE FOR U.S. CONSUMERS?



U.S. QUESTION:

Please indicate whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statement. The U.S. should not outsource manufacturing jobs to China even if eliminating outsourcing results in higher prices for U.S. consumers.

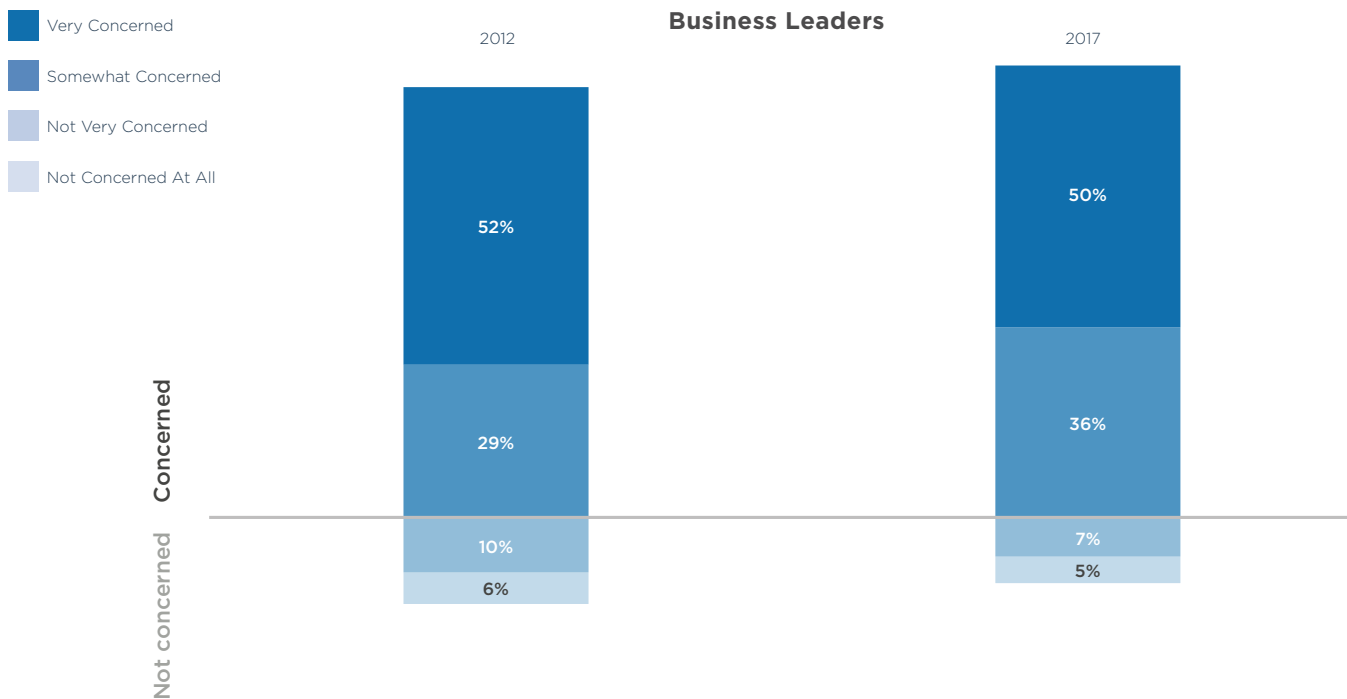


5.7 HOW CONCERNED ARE YOU ABOUT INTELLECTUAL PROPERTY PROTECTION IN CHINA?

U.S. QUESTION:



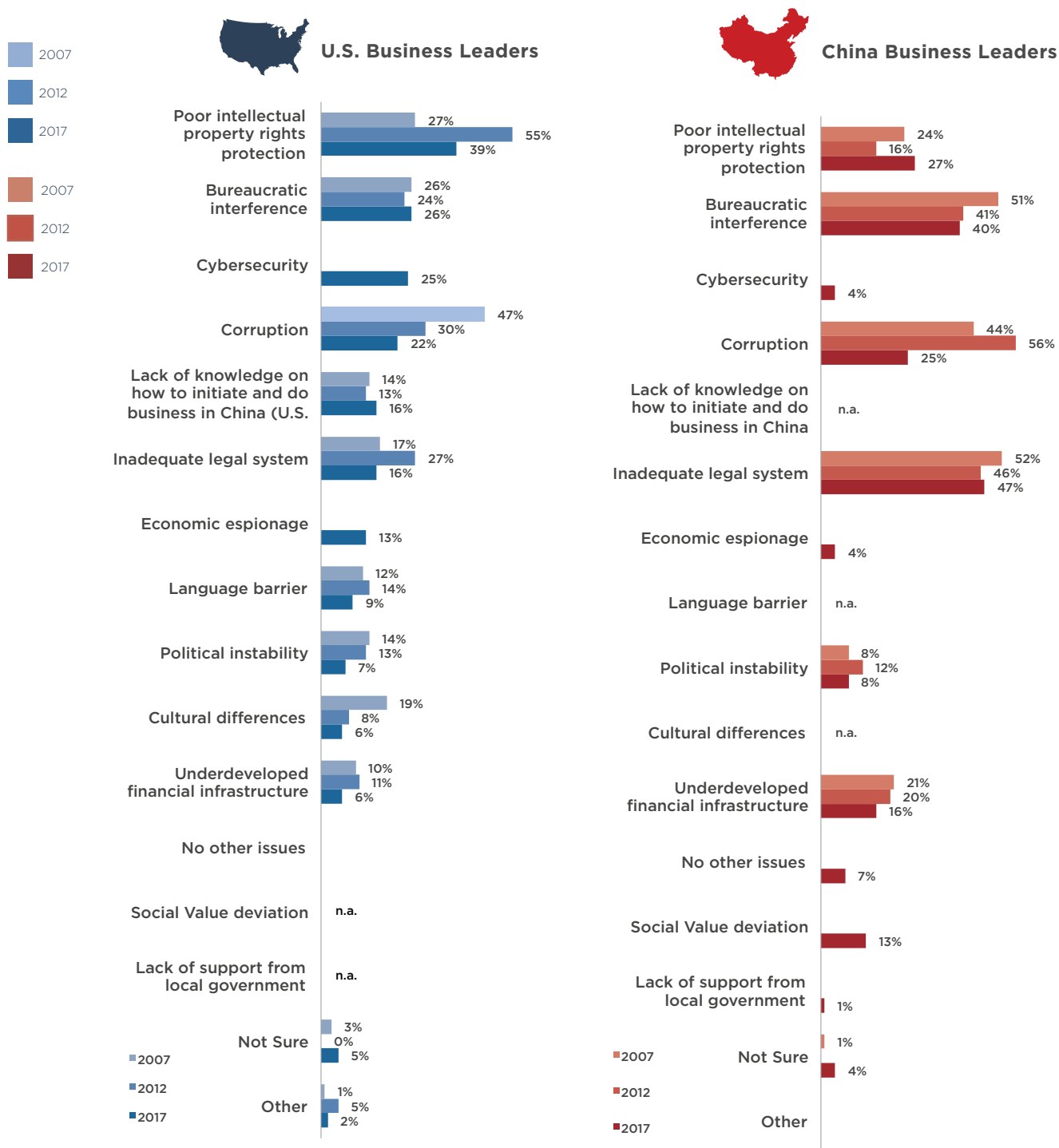
If your company is considering doing business with China, how concerned would you be about China's intellectual property rights protection?



5.8 WHAT ARE YOUR TWO GREATEST CONCERNS ABOUT DOING BUSINESS WITH CHINA?

BASE QUESTION:

What are your two greatest concerns about doing business with China?



5.9 WHAT ARE YOUR TWO GREATEST CONCERNS ABOUT DOING BUSINESS WITH THE U.S.?

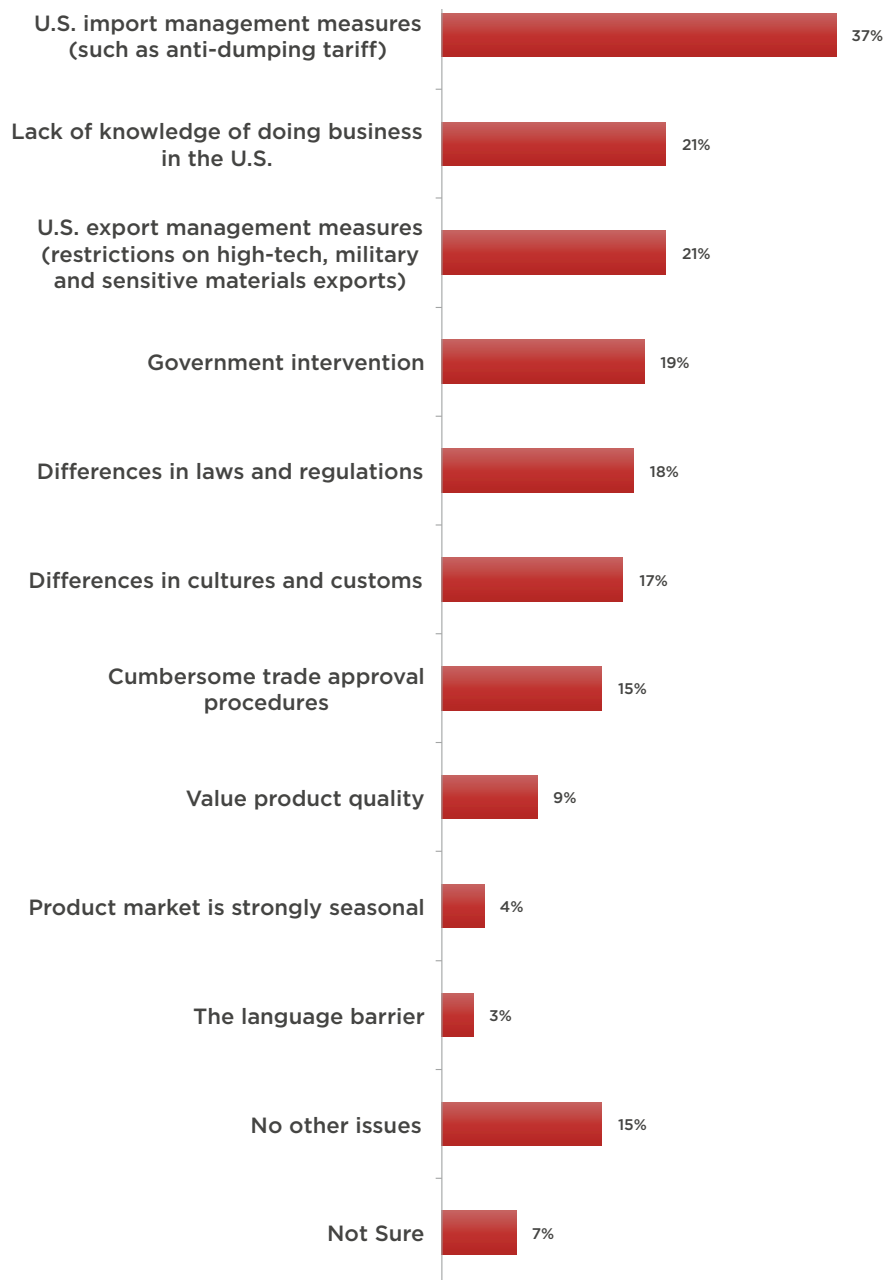


CHINA QUESTION:

What are your two greatest concerns about doing business with the U.S.?

2017

China Business Leaders



5.10 WHAT IS THE IMPACT OF U.S.-CHINA INVESTMENTS ON AMERICA AND CHINA?



U.S. QUESTION:

Thinking about investments between the U.S. and China, please indicate whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with the following statements. Investments between the U.S. and China will...



5.11 IS CHINESE INVESTMENT DRIVEN BY DESIRE FOR PROFIT OR INFLUENCE?

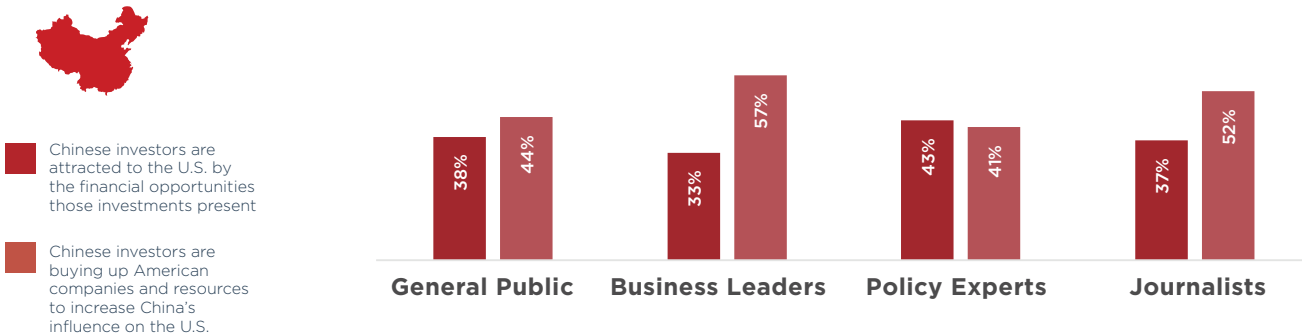
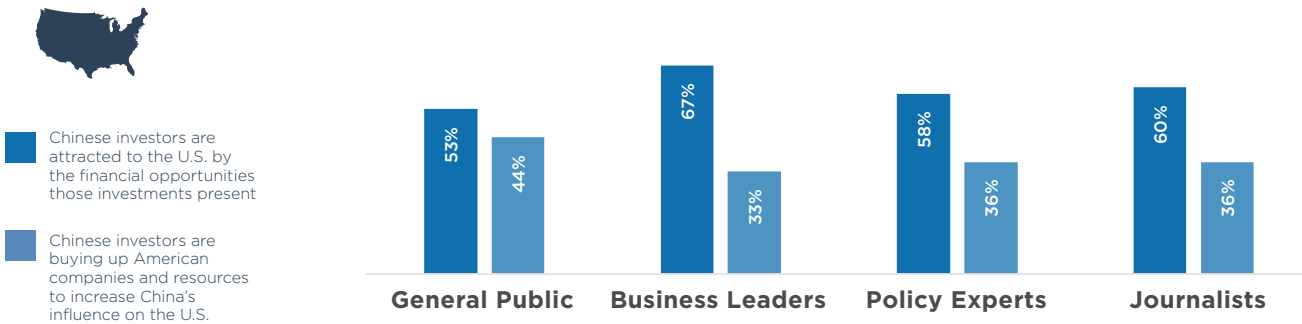
BASE QUESTION:

I will now read two statements about Chinese investment in the U.S.


Please tell me which comes closest to your view.

China investors are attracted to the U.S. by the financial opportunities those investments present

Chinese investors are buying up American companies and resources to increase China's influence on the U.S.

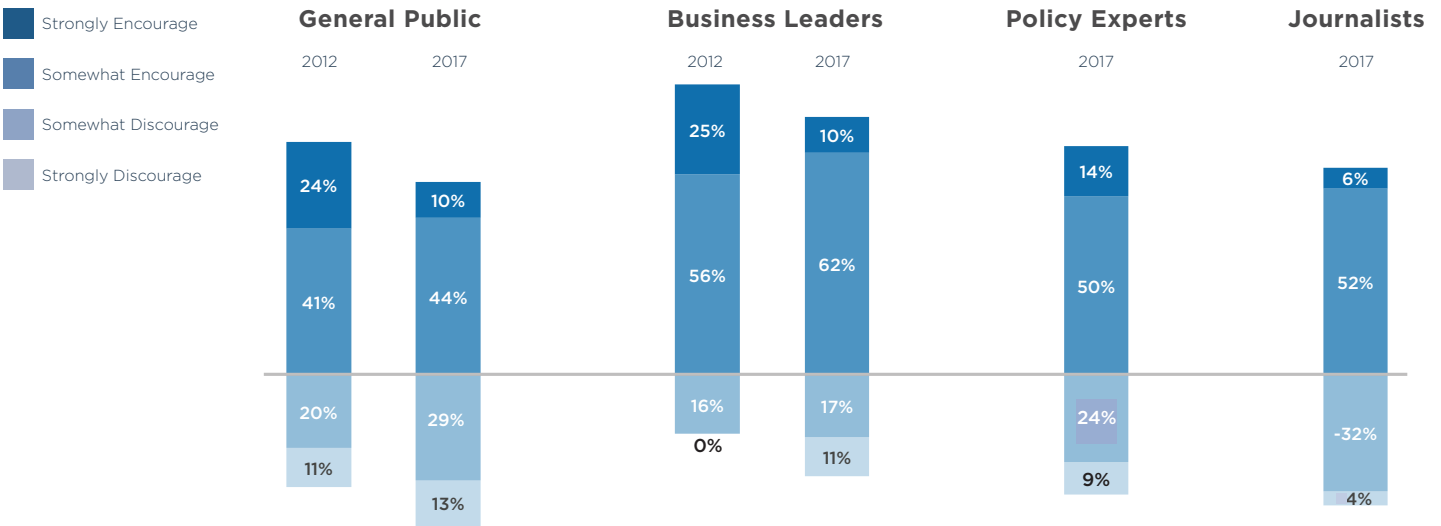


5.12 HOW MUCH SHOULD THE U.S. ENCOURAGE CHINESE INVESTMENT IN THE U.S.?

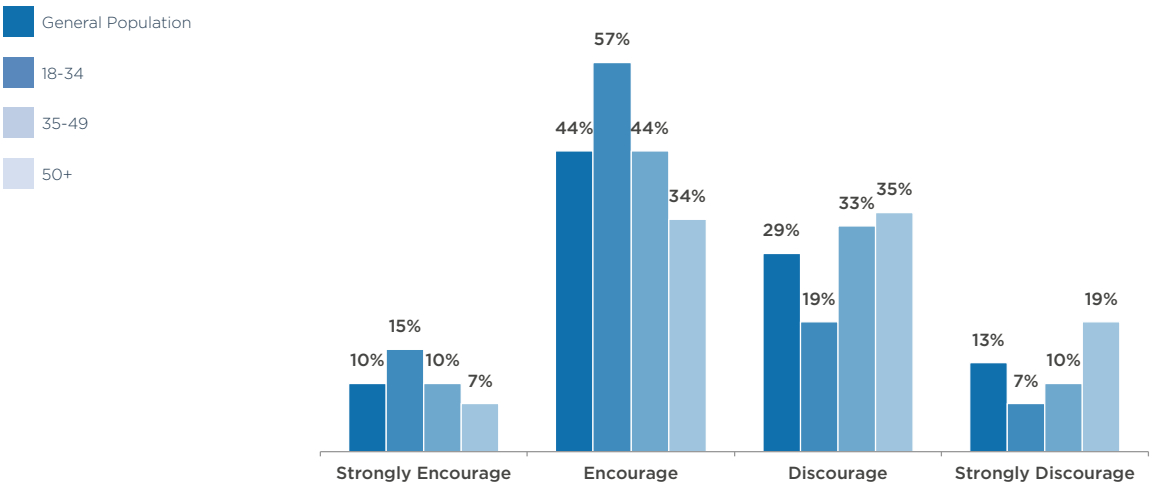


U.S. QUESTION:

How much should the United States encourage Chinese investment in the U.S.?



2017 GENERAL PUBLIC AGE BREAKDOWN



VI. SOFT POWER DYNAMICS:

CULTURE, MEDIA, AND EDUCATION

HIGHLIGHTS

Cultural Exposure and Impact

- A majority of Americans (53%) and Chinese (62%) have seen a movie or tv show from the other country. Fewer Americans (44%) and Chinese (17%) have seen an art exhibit or attended a concert or performance from the other country.
- After seeing a Chinese movie or television show, 21% of the U.S. public had a more favorable impression of China, while 6% had a less favorable impression. After seeing a Chinese exhibit, concert or performance, 45% of the U.S. public had a more favorable impression of China, compared to 2% who had a less favorable impression.
- After seeing an American movie or tv show, 40% of the Chinese public had a more favorable impression of the U.S., while 9% had a less favorable impression. After seeing an American exhibit, concert or performance, 44% of Chinese had a more favorable impression compared to 17% who had a less favorable impression.
- 58% of Americans think the impact of Chinese culture on the U.S. has been favorable; 51% of Chinese think the impact of American culture on China has been favorable.

Visitation

- Very few Americans and Chinese have visited each other's country. Only 7% of the U.S. public has visited China, and 5% of the Chinese public has visited the U.S. Since 2012, the number of Chinese who have visited the U.S. has more than doubled from 2% to 5%.
- For Americans, after visiting China, more than twice the number of people had a more favorable impression (38%) than less (17%). For the Chinese, visiting the U.S. is more mixed: 45% have a more favorable impression while 31% have a less favorable impression of the U.S.

Accuracy of Media Portrayals

- Around two thirds of the American public thinks neither the U.S. nor Chinese media portrays an accurate picture of the other country. The Chinese public is evenly split on whether the Chinese media portrays an accurate picture of the U.S. but more than half (55%) do not think the U.S. media portrays an accurate picture of China.

Teaching Chinese in America

- A large majority of the U.S. public (82%) and 88% of American millennials approve of more Chinese being taught in American schools today.

Educational Exchanges and Study Abroad

- 78% of the American public (86% American millennials) believes that an increase in Chinese students studying in America is good for America.
- 73% of Americans (81% of American millennials) would encourage a family member to go and study abroad in China. 42% of the Chinese public would encourage a family member to study abroad in the U.S. while 29% would encourage them to spend time on other educational activities in the U.S.
- The U.S. public cites costs and lack of funding as the main reason why participation by American students in Chinese study abroad programs has declined in the last two years.

Media Sources

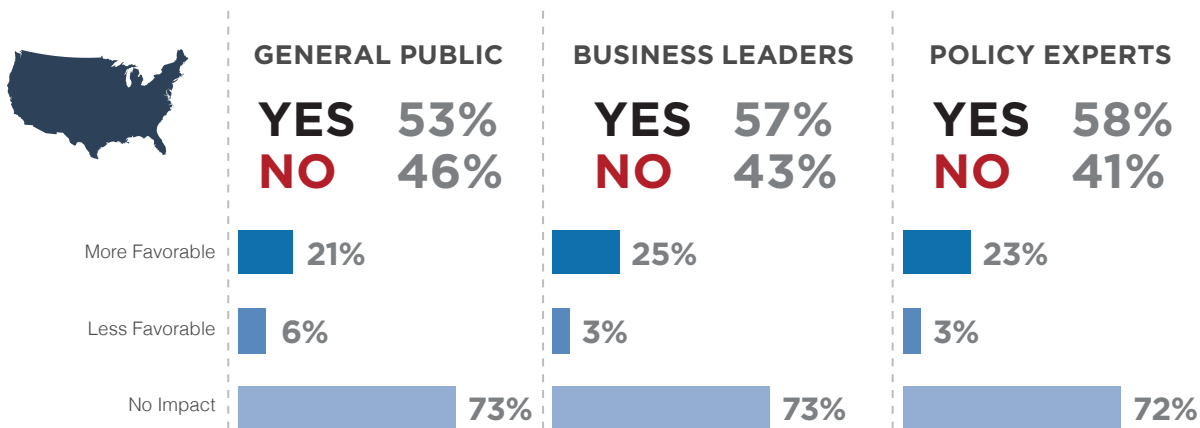
- Television is the main source of news about the other country for the majority of both Chinese and Americans, followed by online news. The exception is with American millennials for whom online news is the top news source.

Note: Complete datasets and additional analyses available at Committee100.org

6.1 HAVE YOU EVER WATCHED A CHINESE MOVIE OR TV SHOW? DID SEEING A CHINESE MOVIE OR TV SHOW IMPROVE YOUR PERCEPTIONS OF THE COUNTRY?

U.S. QUESTION: Have you ever watched a Chinese movie or television show?

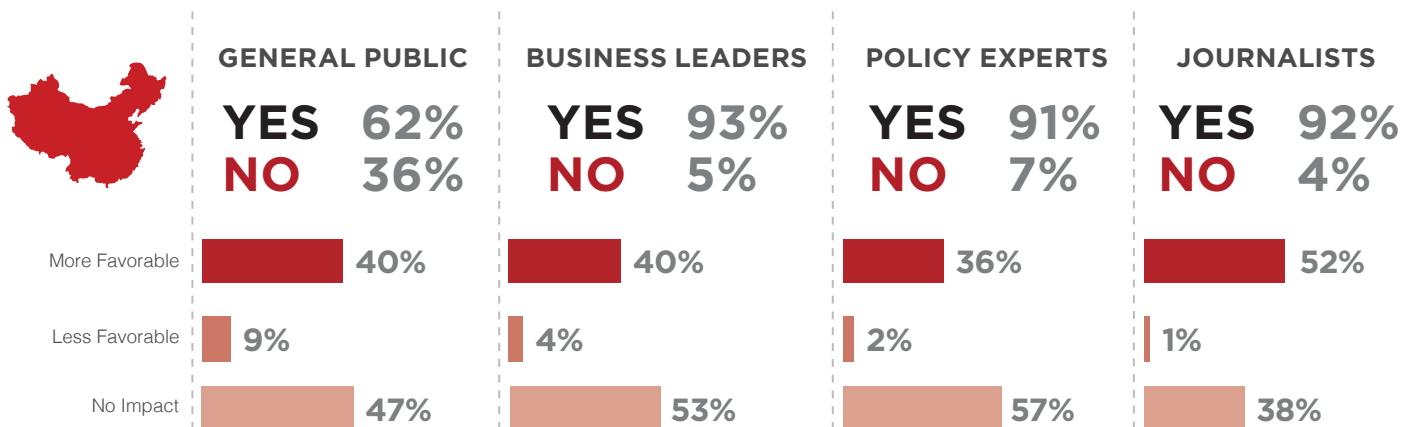
IF YES: Did seeing a Chinese movie or television show give you a more favorable or less favorable perception of China? Or did it not make an impact on how you view China?



6.2 HAVE YOU EVER WATCHED AN AMERICAN MOVIE OR TV SHOW? DID SEEING AN AMERICAN MOVIE OR TV SHOW IMPROVE YOUR PERCEPTIONS OF THE COUNTRY?

CHINA QUESTION: Have you ever watched an American movie or television show?

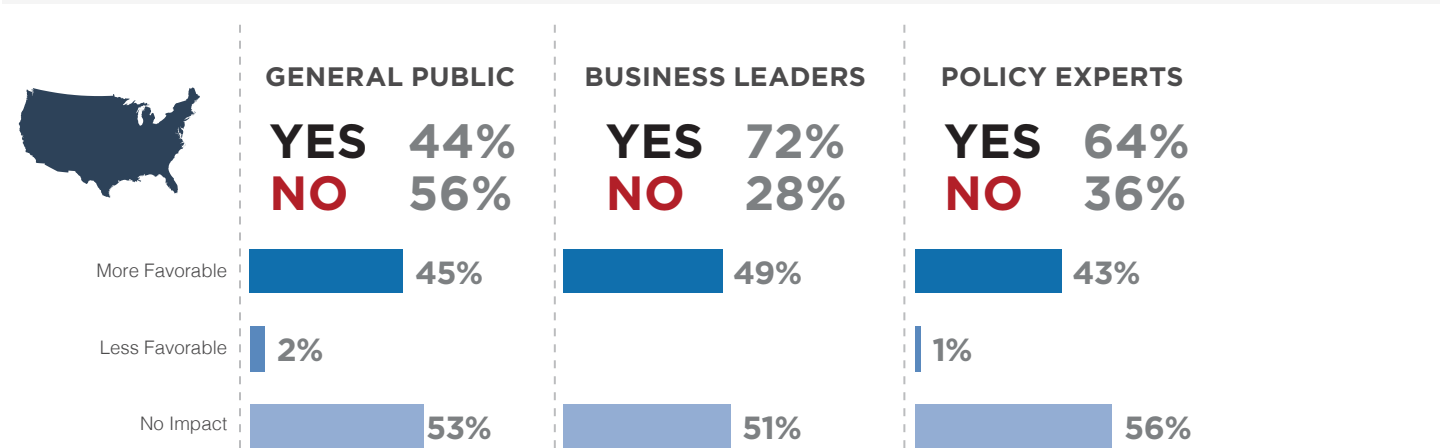
IF YES: Did seeing an American movie or television show give you a more favorable or less favorable perception of the U.S.? Or did it not make an impact on how you view America?



6.3 HAVE YOU EVER SEEN A CHINESE EXHIBIT OR ATTENDED A CHINESE PERFORMANCE? DID THAT IMPROVE YOUR PERCEPTIONS OF THE COUNTRY?

U.S. QUESTION: Have you ever seen a Chinese exhibit or been to a concert or performance?

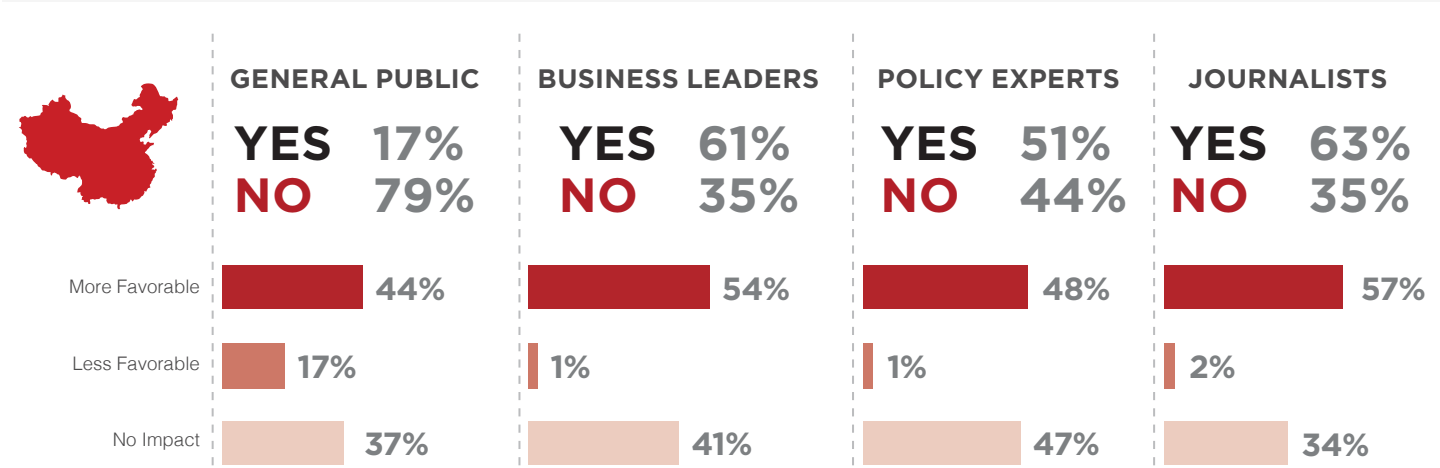
IF YES: Did seeing a Chinese exhibit, concert or performance give you a more favorable or less favorable perception of China? Or did it not make an impact on how you view China?



6.4 HAVE YOU EVER SEEN AN AMERICAN EXHIBIT OR ATTENDED AN AMERICAN PERFORMANCE? DID THAT IMPROVE YOUR PERCEPTIONS OF THE COUNTRY?

CHINA QUESTION: Have you ever seen an American exhibit or been to a concert or performance?

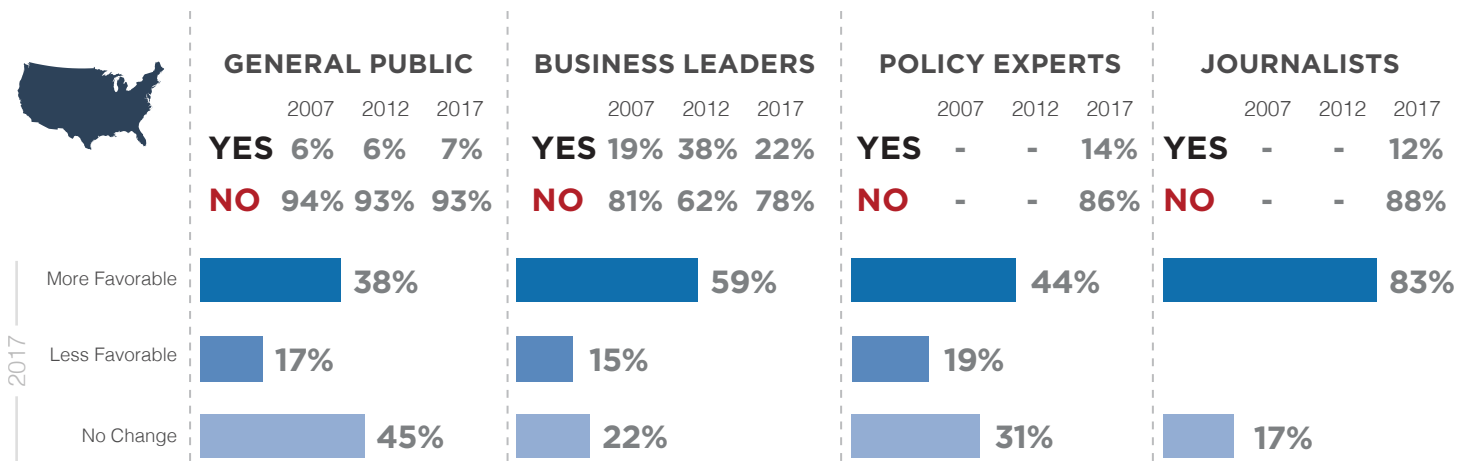
IF YES: Did seeing an American exhibit, concert or performance give you a more favorable or less favorable perception of the U.S.? Or did it not make an impact on how you view America?



6.5 HAVE YOU EVER VISITED MAINLAND CHINA / U.S.?

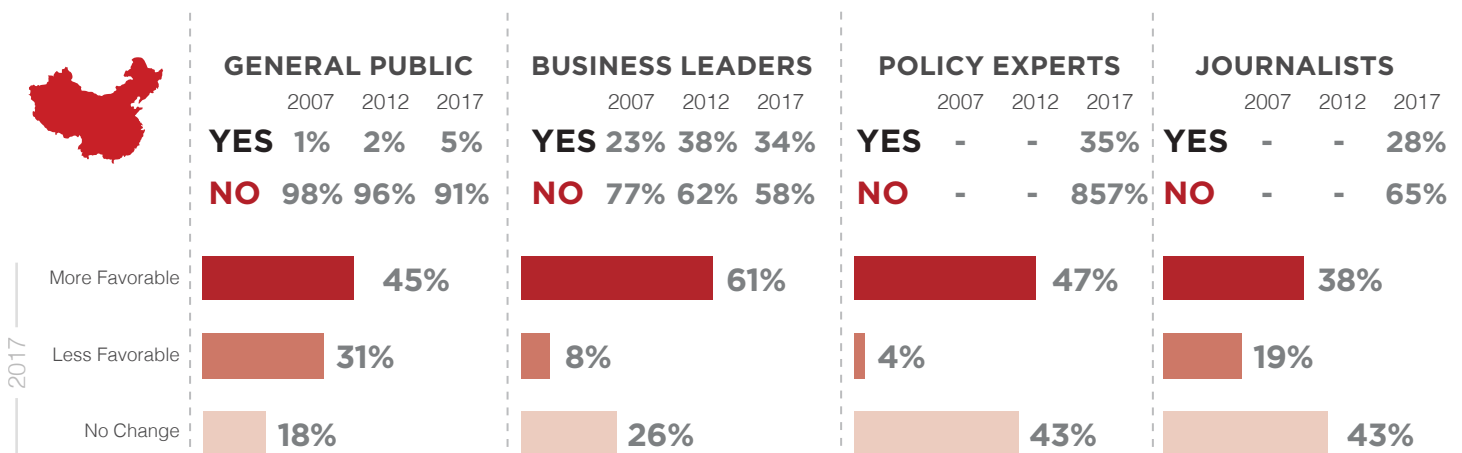
U.S. QUESTION: Have you ever visited mainland China?

IF YES: After visiting mainland China, is your impression of China more favorable, less favorable, or was there no change?



CHINA QUESTION: Have you ever visited the U.S.?

IF YES: After visiting the U.S., is your impression of America more favorable, less favorable, or was there no change?



6.6 DO YOU THINK CHINESE / U.S. MEDIA PORTRAYS AN ACCURATE PICTURE OF THE U.S. / CHINA?

BASE QUESTION:

Do you think that the Chinese media portrays an accurate picture of the U.S.?



GENERAL PUBLIC

YES 10%
NO 68%

BUSINESS LEADERS

YES 5%
NO 75%

POLICY EXPERTS

YES 8%
NO 73%

JOURNALISTS

YES 2%
NO 84%



GENERAL PUBLIC

YES 42%
NO 40%

BUSINESS LEADERS

YES 25%
NO 52%

POLICY EXPERTS

YES 24%
NO 45%

JOURNALISTS

YES 25%
NO 53%

BASE QUESTION:

Do you think that the U.S. media portrays an accurate picture of China?



GENERAL PUBLIC

YES 27%
NO 64%

BUSINESS LEADERS

YES 34%
NO 60%

POLICY EXPERTS

YES 27%
NO 65%

JOURNALISTS

YES 34%
NO 58%



GENERAL PUBLIC

YES 24%
NO 55%

BUSINESS LEADERS

YES 15%
NO 57%

POLICY EXPERTS

YES 11%
NO 65%

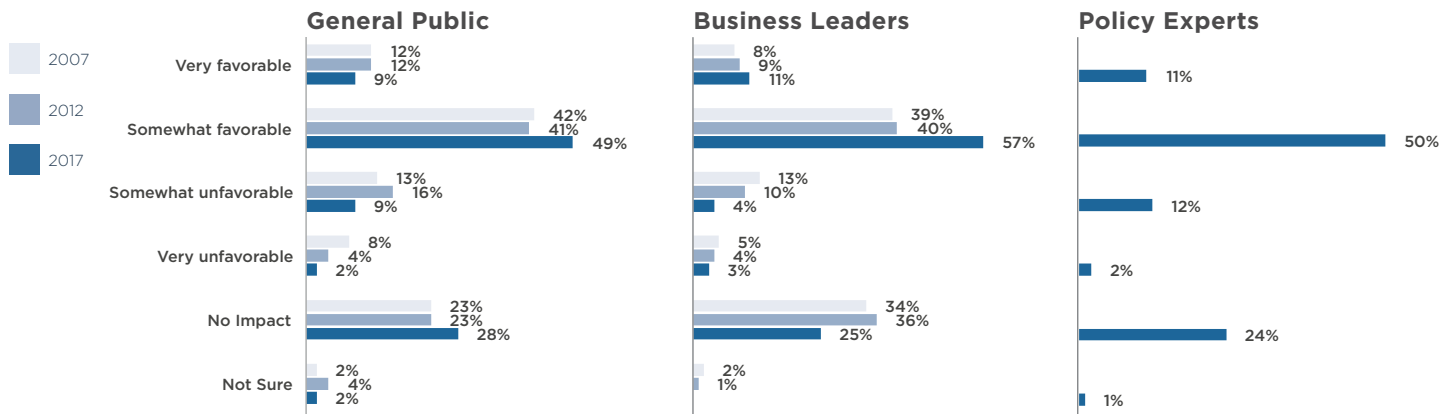
JOURNALISTS

YES 17%
NO 65%

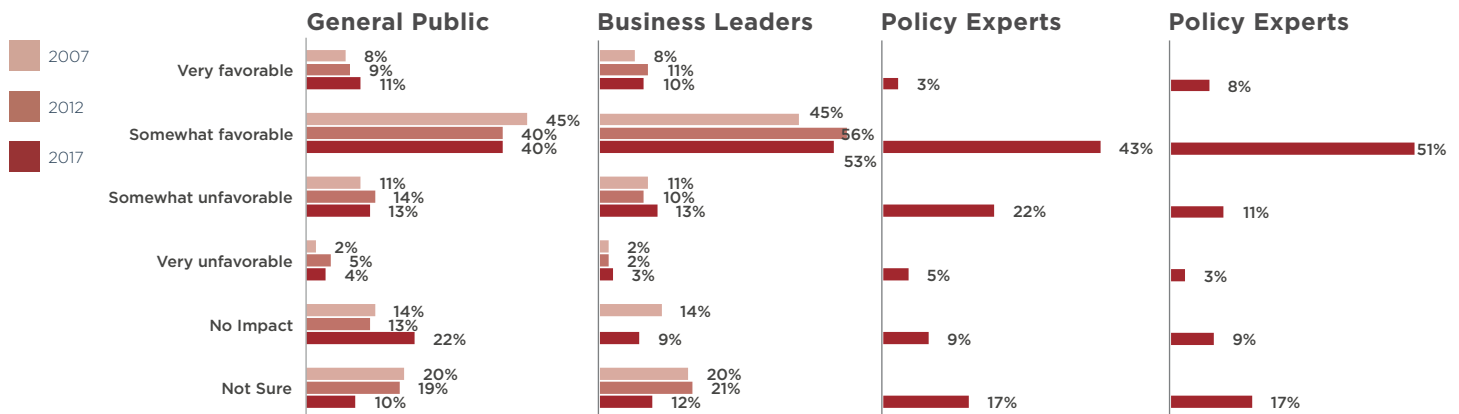
6.7 HAS CHINESE / U.S. CULTURE ON THE U.S. / CHINA HAD A FAVORABLE OR UNFAVORABLE IMPACT?



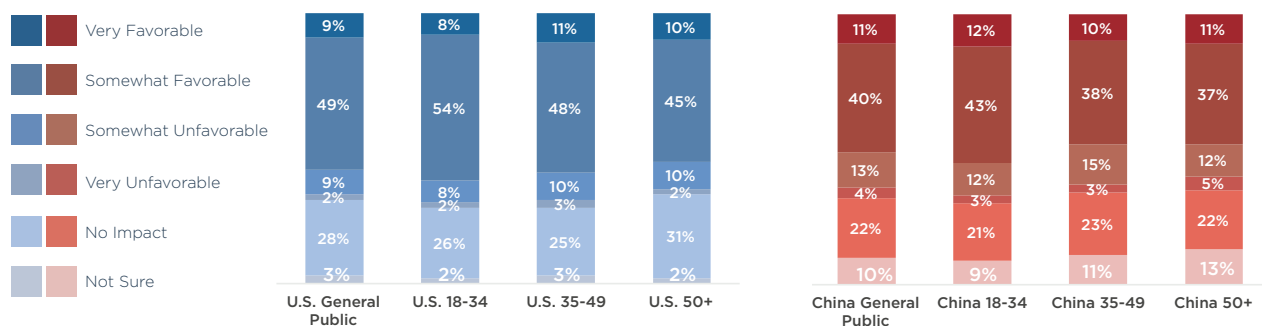
U.S. QUESTION: Would you say the impact of Chinese culture on the U.S. has been very favorable, somewhat favorable, somewhat unfavorable, very unfavorable or has it had no impact?




CHINA QUESTION: Would you say the impact of American culture on China has been very favorable, somewhat favorable, somewhat unfavorable, very unfavorable or has it had no impact?



2017 GENERAL PUBLIC AGE BREAKDOWN

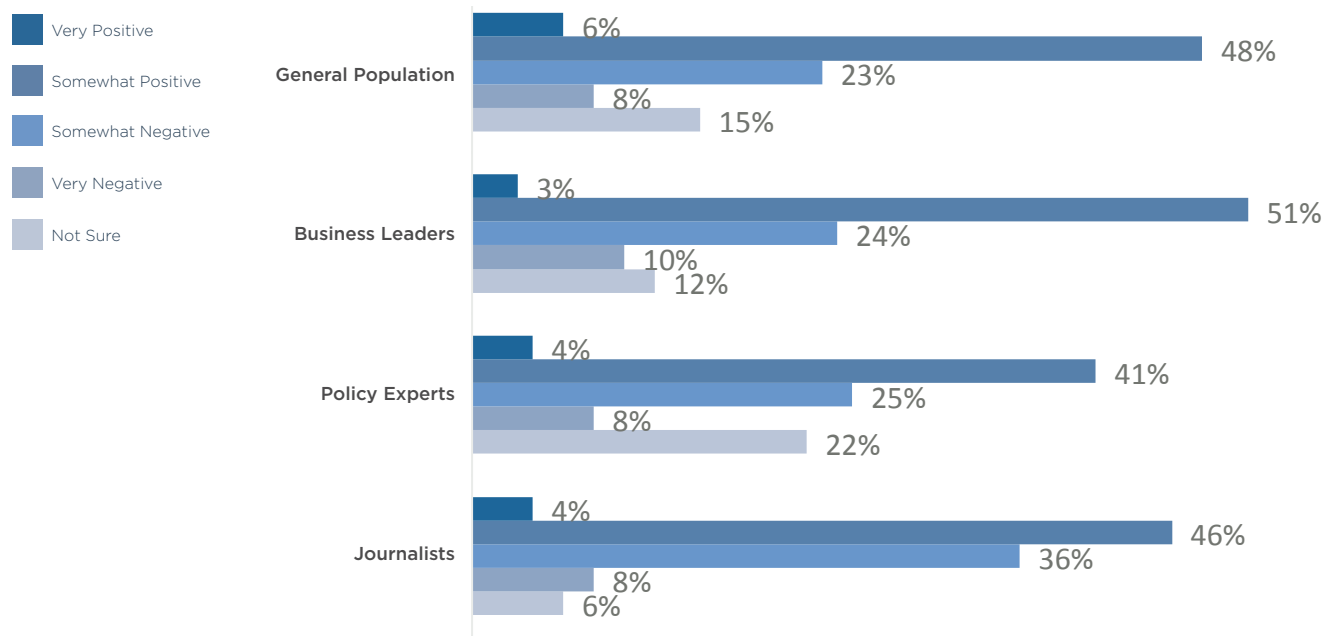


6.8 HOW DO YOU FEEL ABOUT CHINESE INVESTMENT IN HOLLYWOOD?

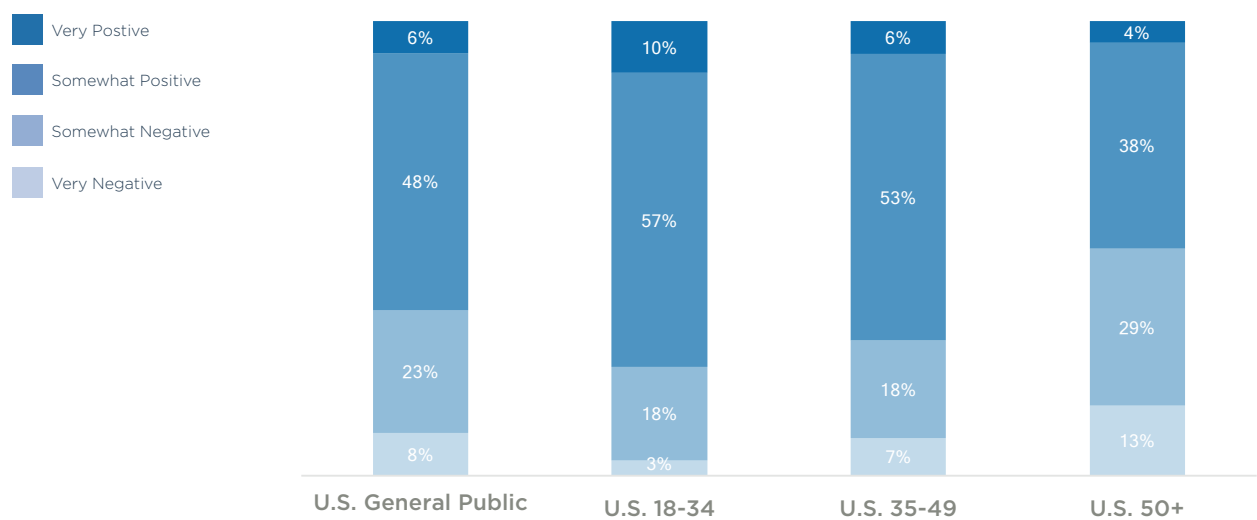


U.S. QUESTION:

How do you feel about Chinese investment in Hollywood’s film industry?
Is it very positive, somewhat positive, somewhat negative, or very negative?



2017 U.S. GENERAL PUBLIC AGE BREAKDOWN

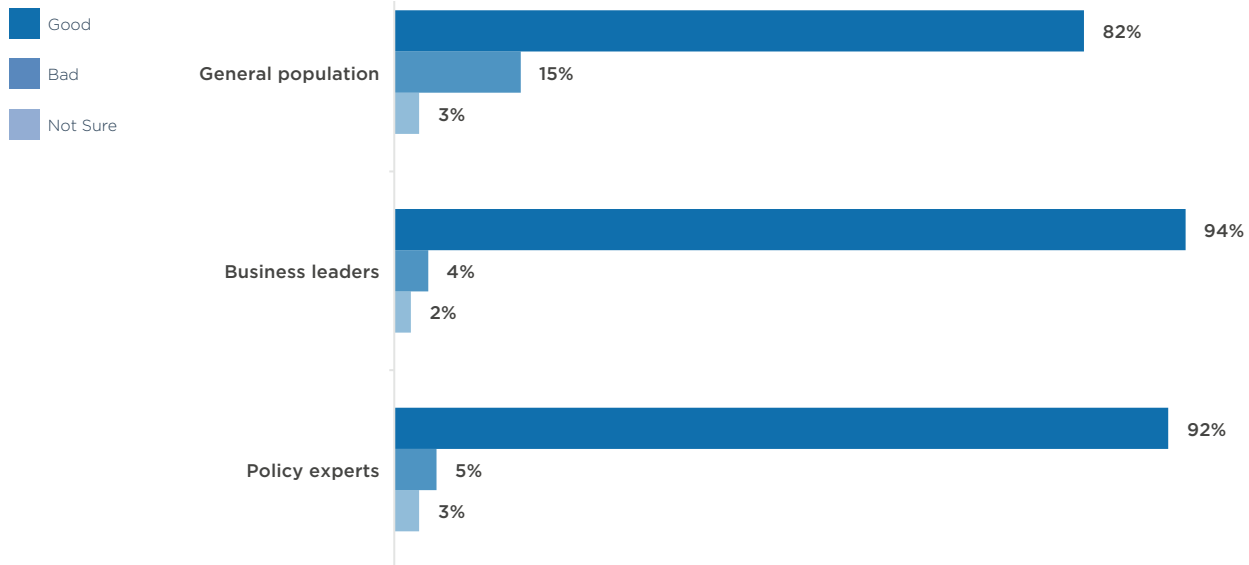


6.9 IS TEACHING CHINESE IN SCHOOLS A GOOD OR BAD IDEA?

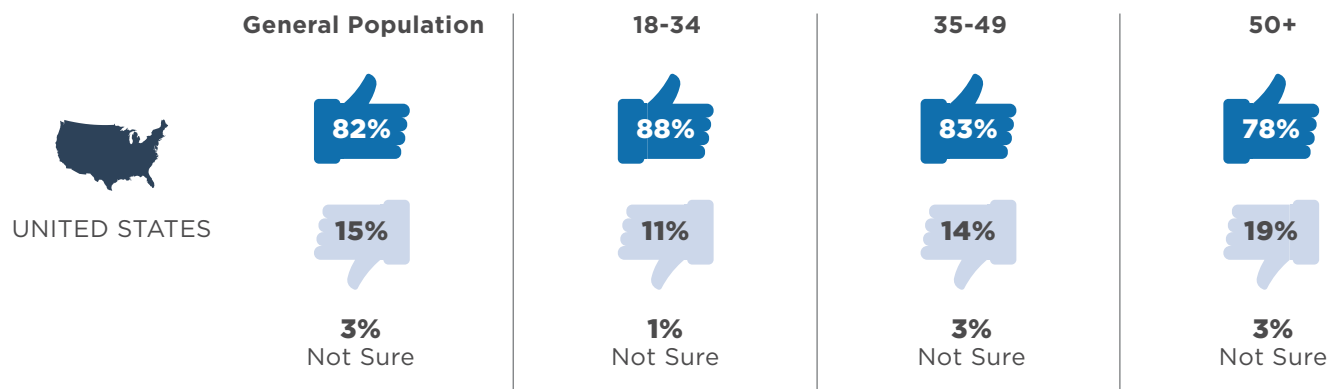


U.S. QUESTION:


More schools are teaching Chinese today. Do you think this is a good or bad idea?



2017 U.S. GENERAL PUBLIC AGE BREAKDOWN

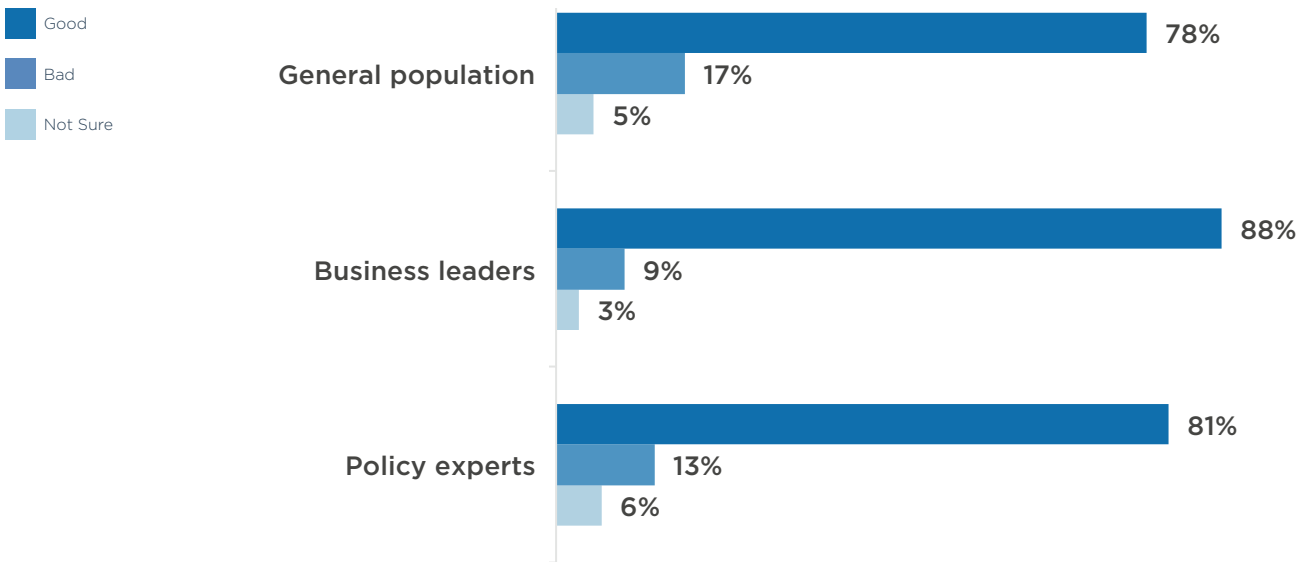


6.10 IS AN INCREASE OF CHINESE STUDENTS IN THE U.S. GOOD OR BAD FOR AMERICA?

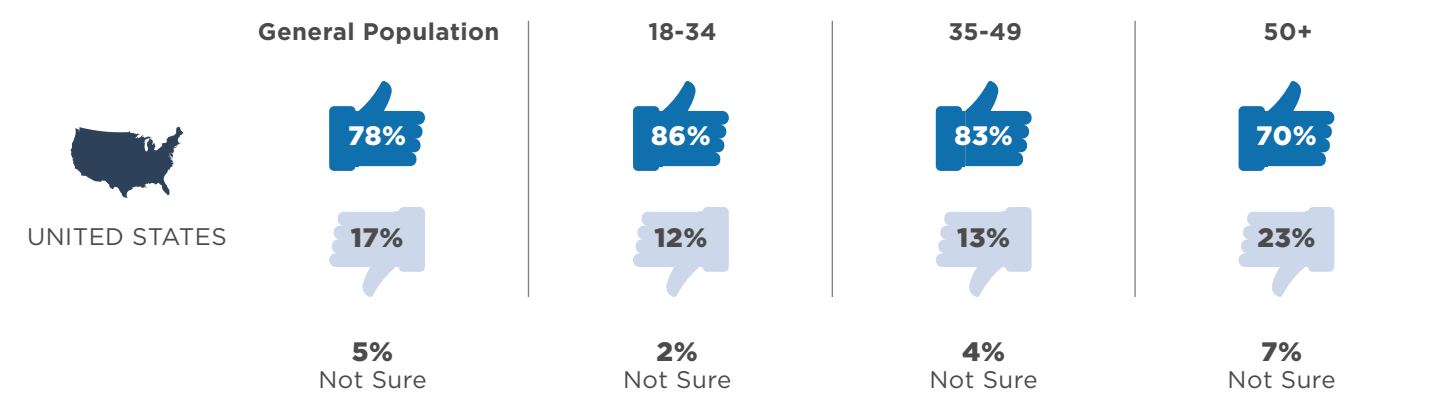


U.S. QUESTION:

Is an increase of Chinese students studying in the U.S. good for or bad for America?



2017 U.S. GENERAL PUBLIC AGE BREAKDOWN

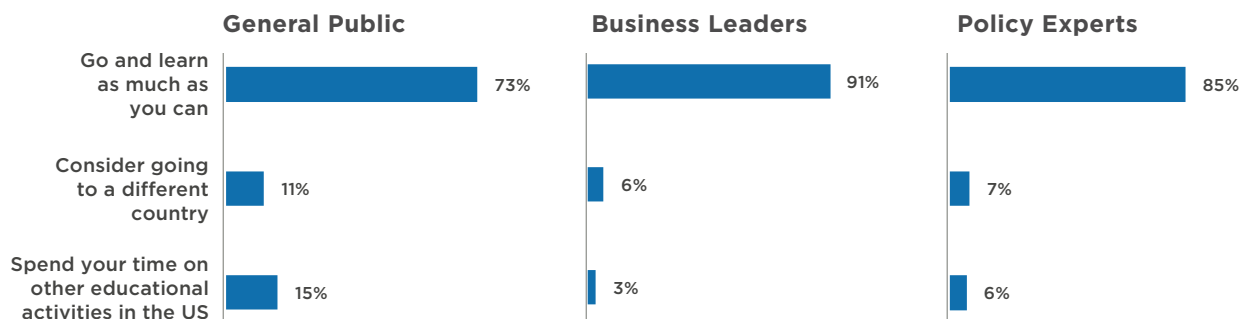


6.11 WOULD YOU ENCOURAGE STUDYING ABROAD IN THE U.S. / CHINA?



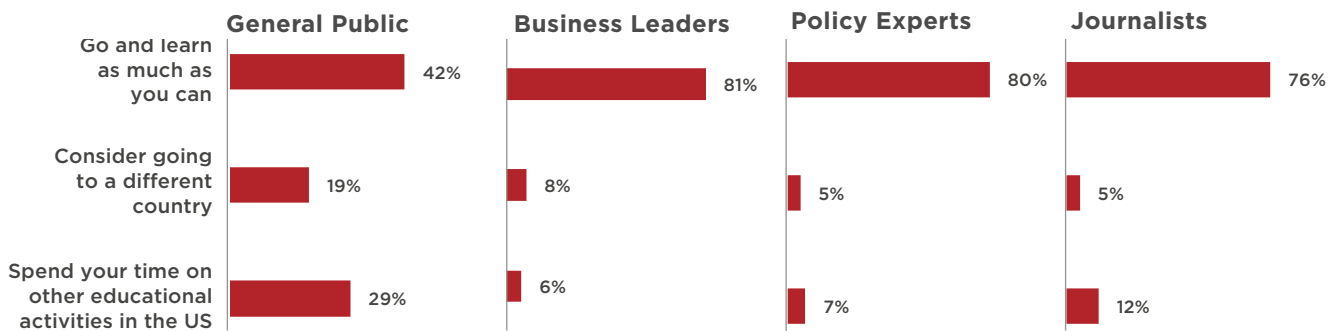
U.S. QUESTION:

If a close family member (such as a son, daughter, niece, nephew, cousin) was considering a study abroad program in China, which of the following comes closest to your advice to them?

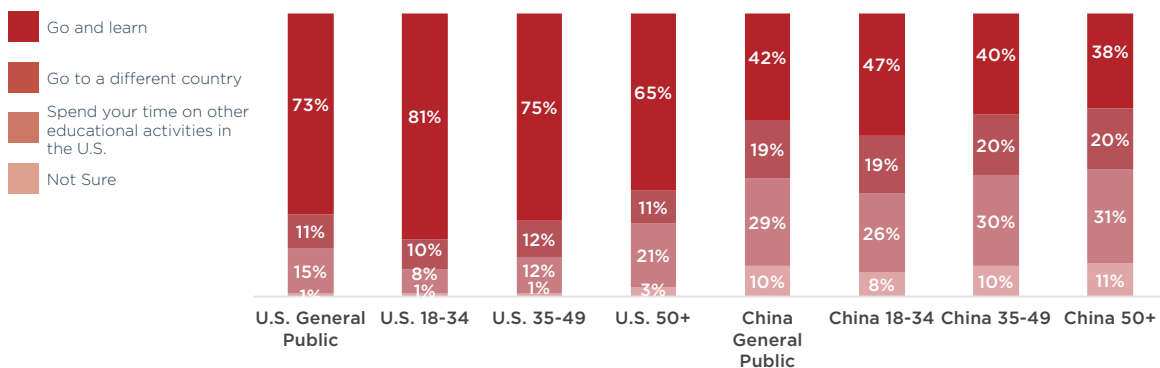


CHINA QUESTION:

If a close family member (such as a son, daughter, niece, nephew, cousin) was considering a study abroad program in the U.S., which of the following comes closest to your advice to them?



2017 U.S. GENERAL PUBLIC AGE BREAKDOWN

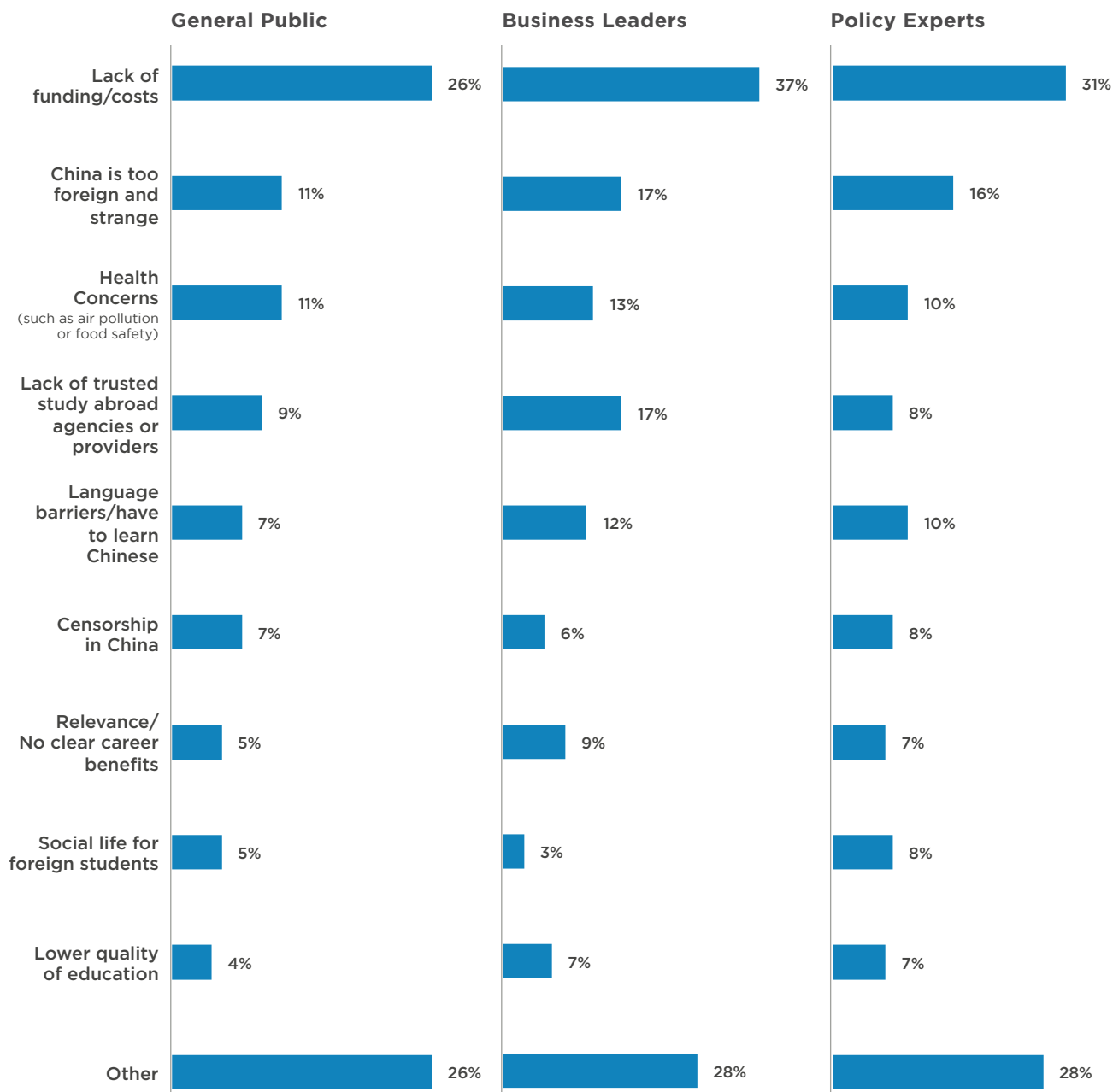


6.12 WHAT IS CAUSING THE DECLINE IN AMERICAN STUDENTS STUDYING ABROAD IN CHINA?

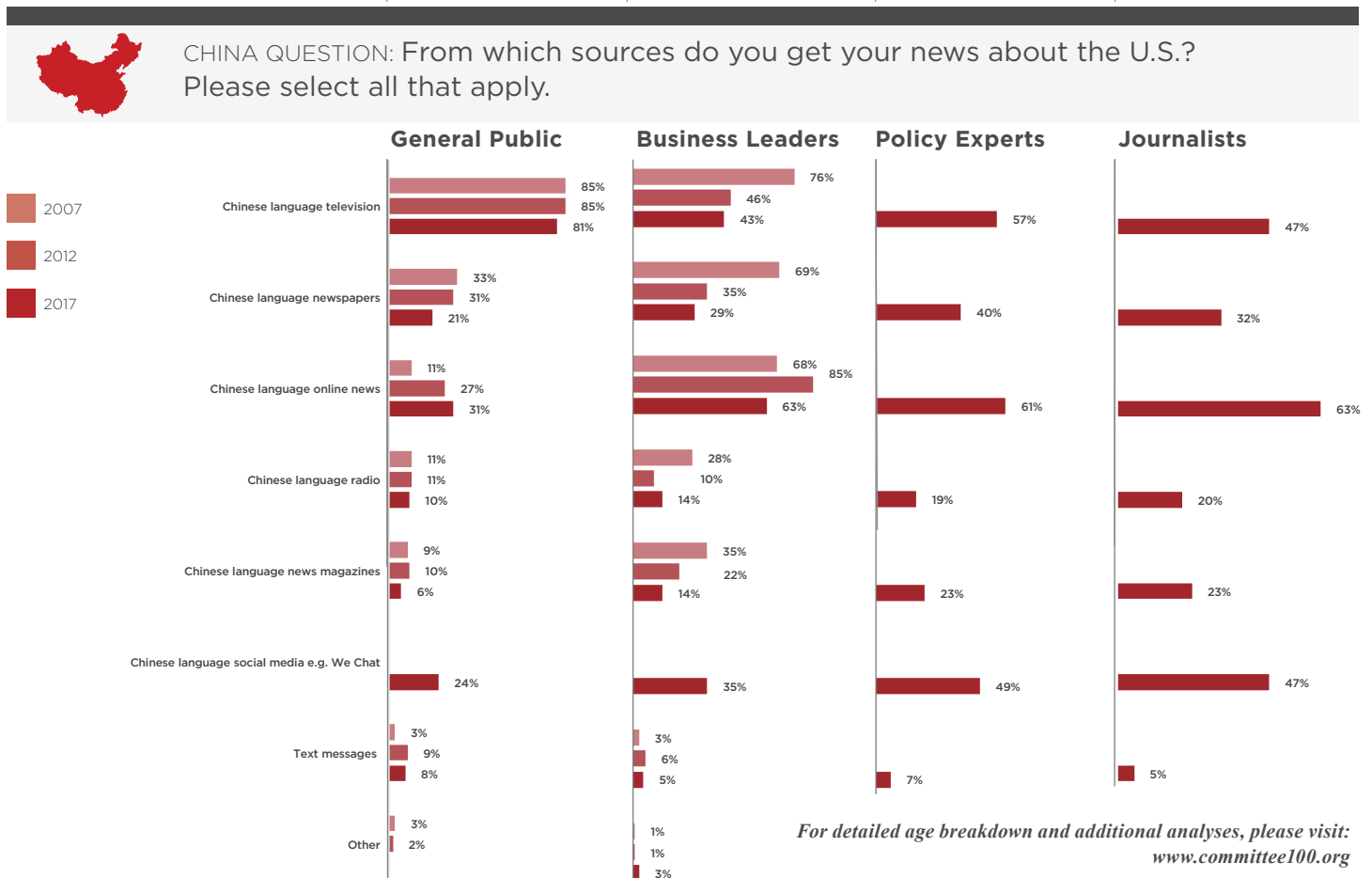
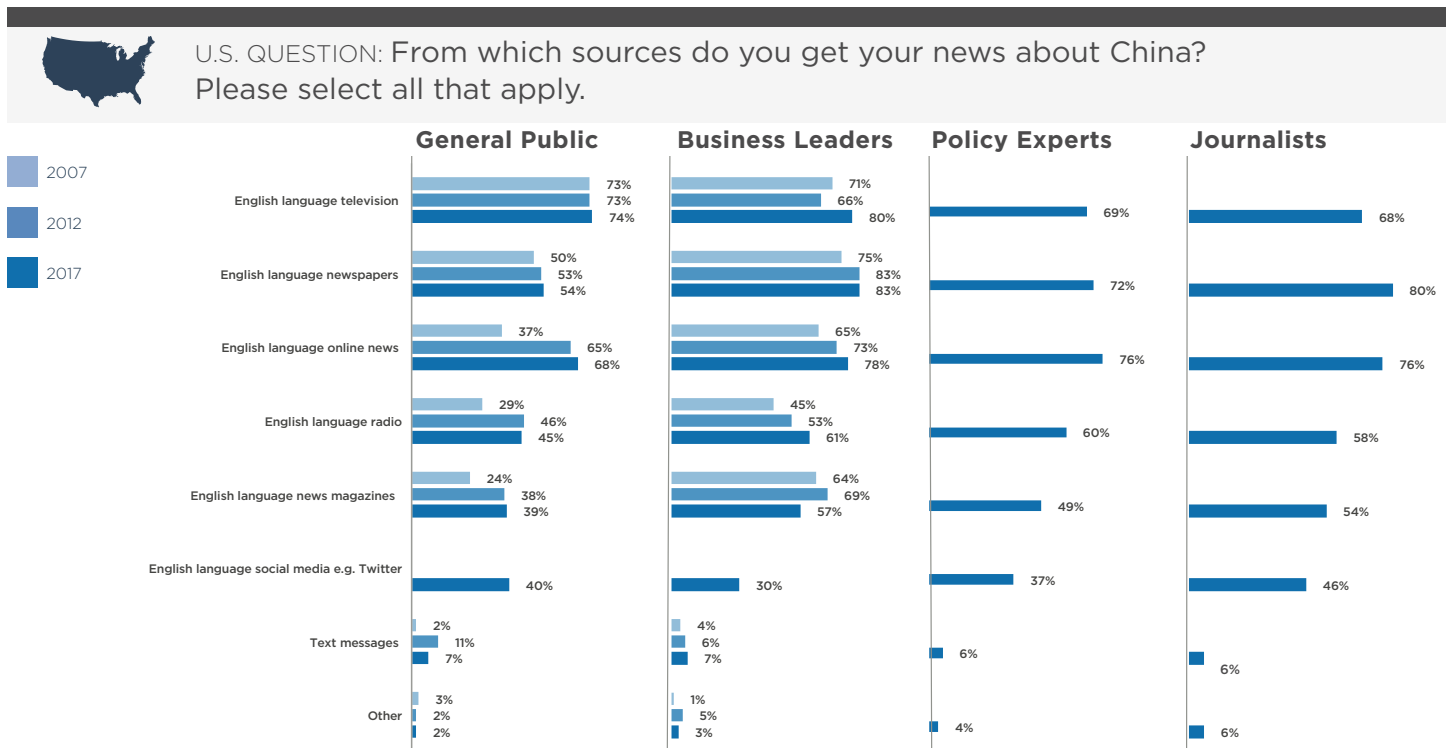


U.S. QUESTION:

Over the past two years, participation by American students in Chinese study abroad programs has declined. What are some reasons you think could be causing this decline?

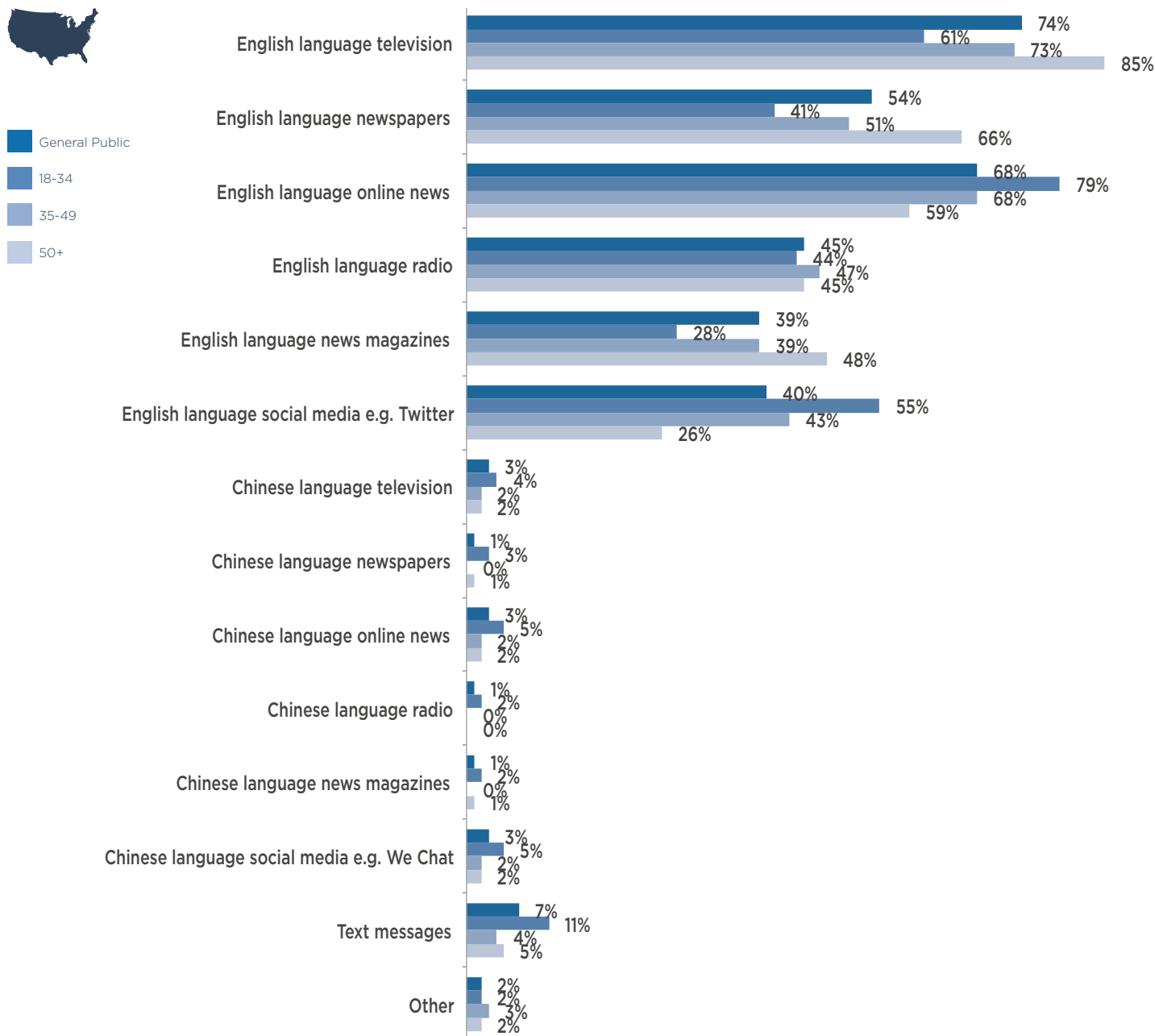


6.13 WHERE DO YOU GET YOUR CHINA / U.S. NEWS?



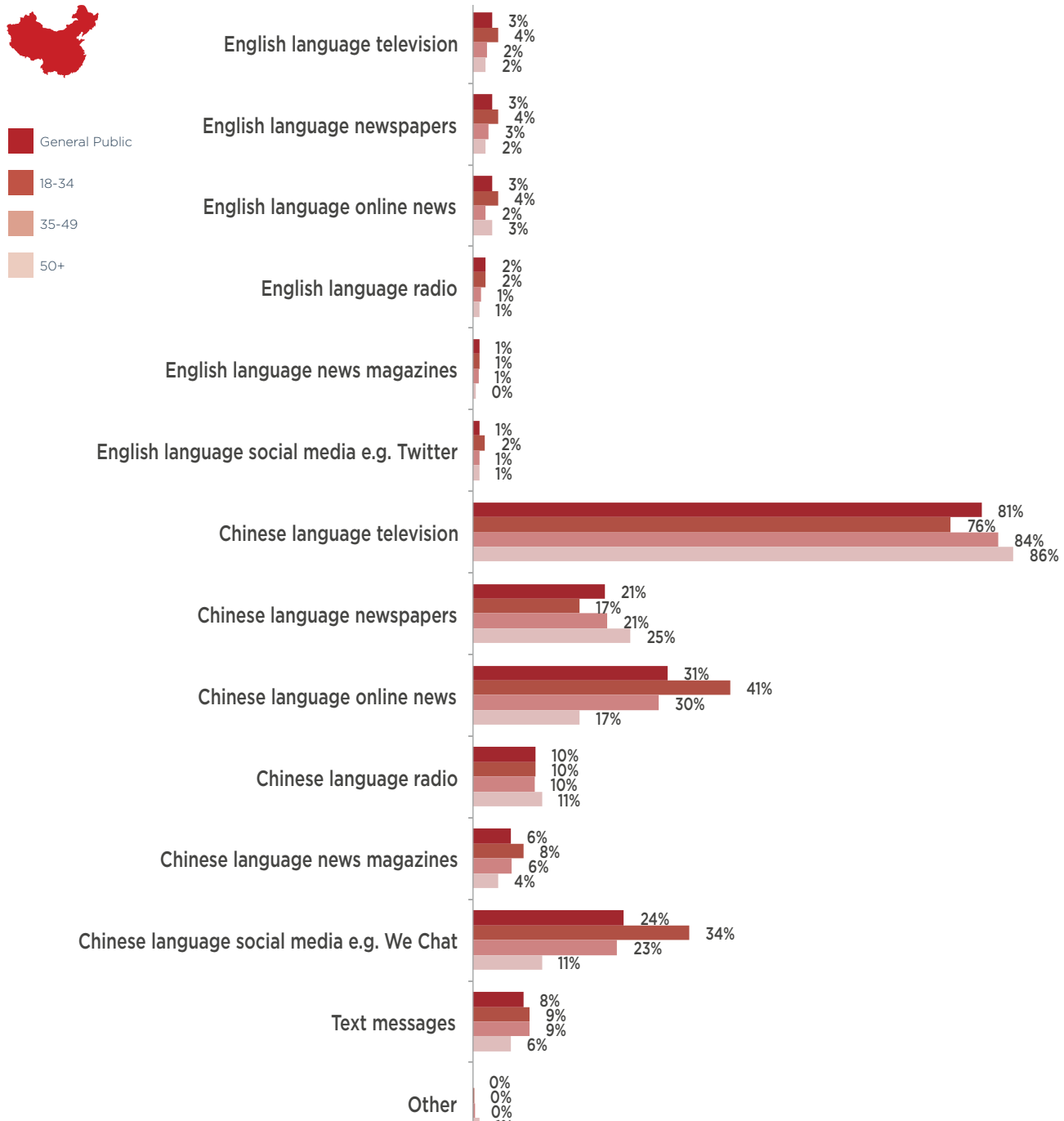
6.13 WHERE DO YOU GET YOUR CHINA / U.S. NEWS? (CONTINUED)

2017 GENERAL PUBLIC AGE BREAKDOWN



6.13 WHERE DO YOU GET YOUR CHINA / U.S. NEWS? (CONTINUED)

2017 GENERAL PUBLIC AGE BREAKDOWN (CONTINUED)



VII. DOMESTIC VIEWS

HIGHLIGHTS

Perception of Chinese Americans in America

- Americans are evenly divided as to whether Chinese Americans face discrimination at work in the U.S.: 48% think yes, 46% think no. 46% of the Chinese public thinks Chinese Americans face discrimination at work compared to 40% who think no.
- 65% of Americans do not think that Chinese Americans who work for the U.S. government and U.S. companies as researchers, scientists and engineers pose a security risk to the U.S.

U.S. Access to Information on China

- 73% of U.S. business leaders and 64% of U.S. policy experts agree that their Congress member and Congressional office have access to enough relevant information about China and the state of U.S.-China relations.

Chinese Access to Information on U.S.

- 68% of Chinese business leaders, 57% of Chinese policy experts, and 62% of Chinese journalists feel that Chinese government officials have enough access to relevant information about the U.S. and the state of U.S.-China relations.

Usefulness of Communication with Chinese Officials

- 11% of U.S. business leaders, 9% of U.S. policy experts, and 8% of U.S. journalists have communicated directly with Chinese officials on U.S.-China issues.
- For those who have had direct communications with Chinese officials, 39% of business leaders, 43% of policy experts and 50% of journalists found it somewhat to very helpful.

Usefulness of Communication with U.S. Government Officials

- 9% of Chinese business leaders, 13% of Chinese policy experts, and 20% of Chinese journalists have communicated directly with U.S. government officials on U.S.-China issues.
- Of those who have had direct communications with U.S. officials, 38% of business leaders found it somewhat to highly useful, 20% of policy experts and 33% of journalists found it somewhat useful.

Chinese Domestic Perceptions

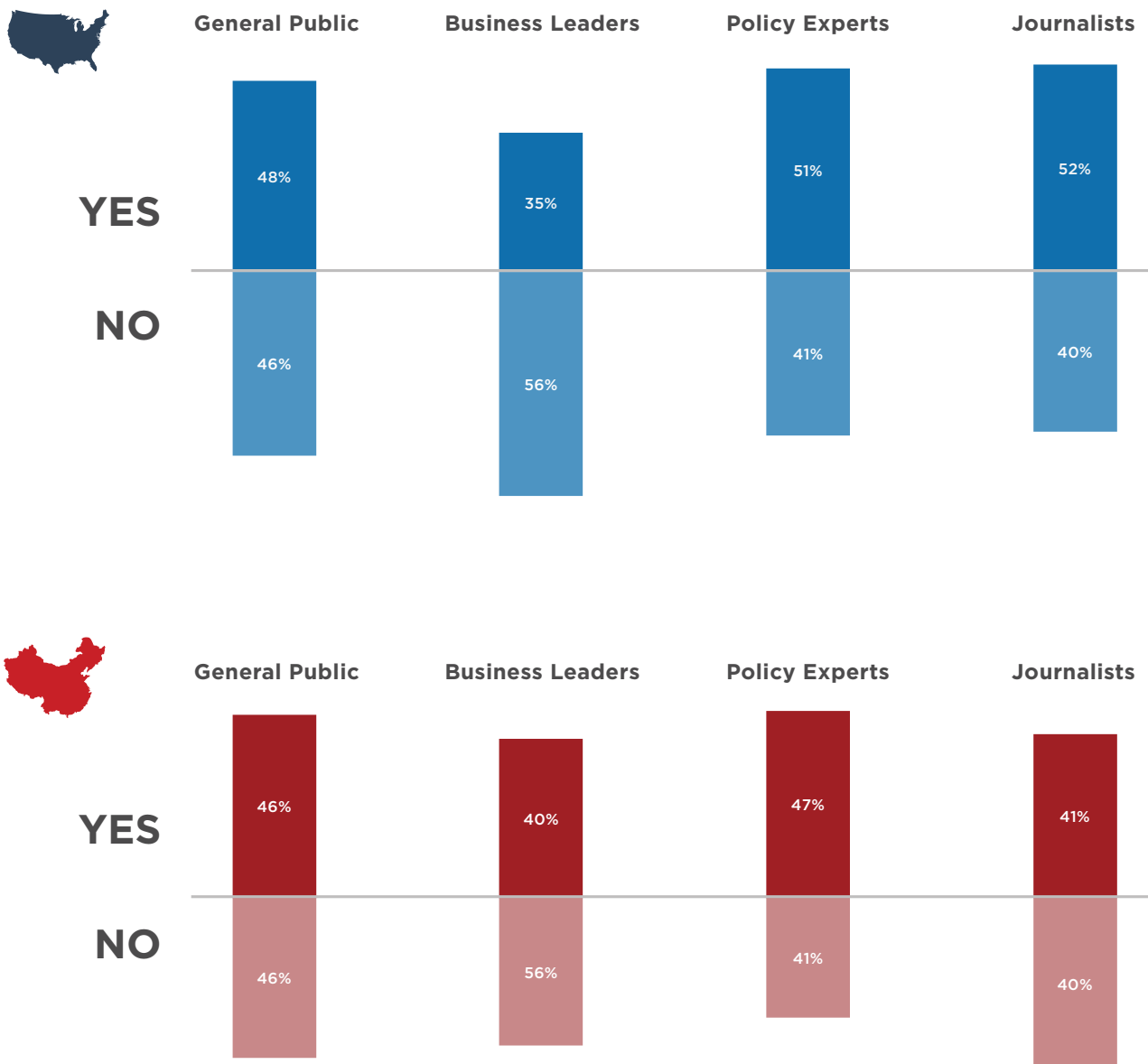
- On a variety of domestic issues, more than half the Chinese public agrees that the next generation of Chinese will enjoy a better housing environment, better air quality, better food and product safety, less corruption, better economic conditions, a more equal society, and better career opportunities.

Note: Complete datasets and additional analyses available at Committee100.org

7.1 DO CHINESE IMMIGRANTS AND CHINESE AMERICANS FACE DISCRIMINATION AT WORK IN THE U.S.?

BASE QUESTION:

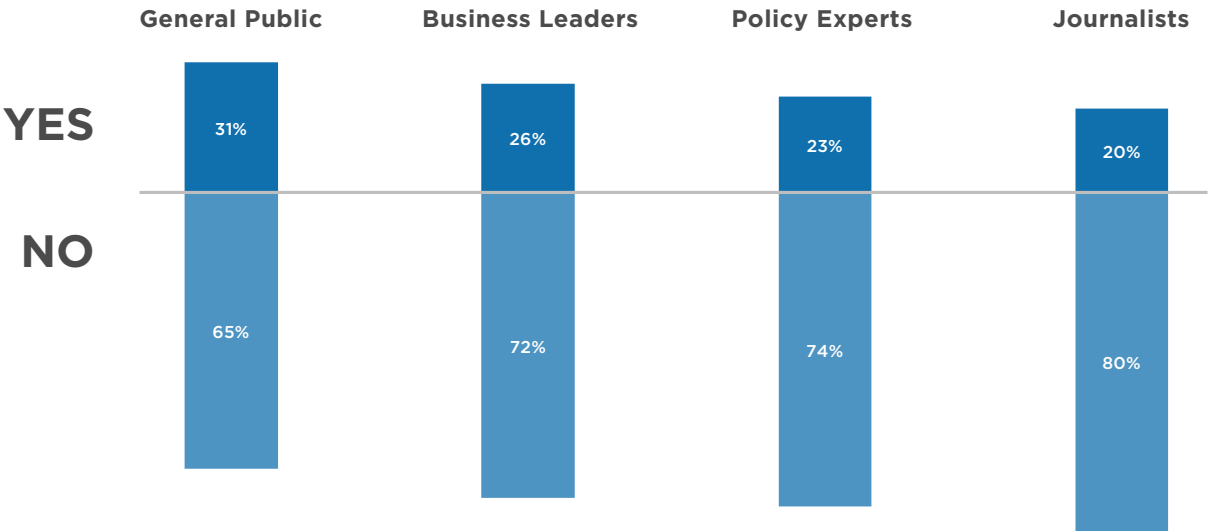
Do you think Chinese immigrants and Chinese Americans face discrimination at work in the U.S.?



7.2 DO CHINESE RESEARCHERS, SCIENTISTS AND ENGINEERS IN AMERICA POSE A SECURITY RISK TO THE U.S.?



U.S. QUESTION:
Many Chinese immigrants and Chinese Americans work for the U.S. government and U.S. companies as researchers, scientists, and engineers. Do you think these individuals pose a security risk to the U.S.?

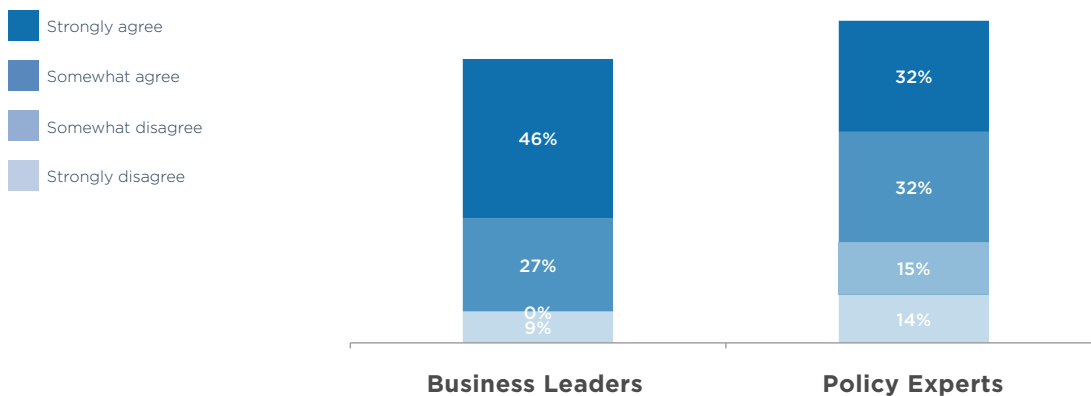


7.3 DOES CONGRESS / CHINESE GOVERNMENT OFFICIALS HAVE ACCESS TO ENOUGH RELEVANT INFORMATION ABOUT CHINA / U.S. AND THE STATE OF U.S.- CHINA RELATIONS?



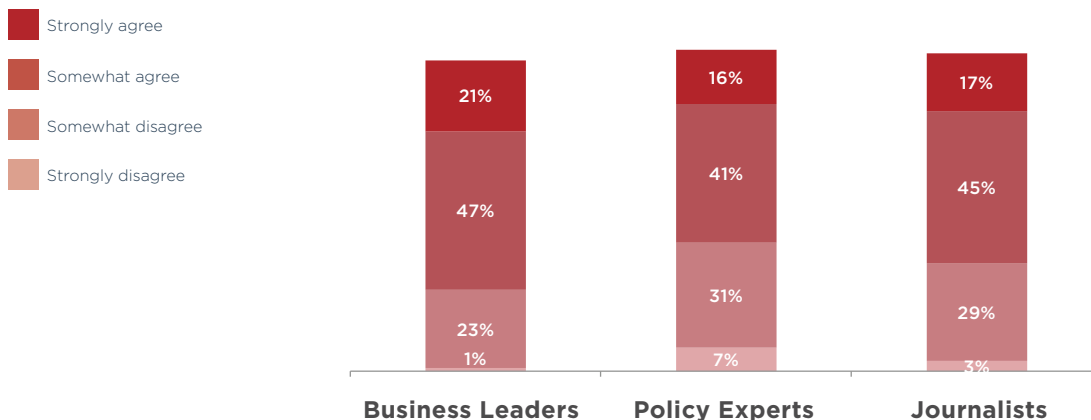
U.S. QUESTION:

Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: I feel my member of Congress and our Congressional office have access to enough relevant information about China and the state of U.S.-China relations.




CHINA QUESTION:

Please tell me whether you strongly agree, somewhat agree, somewhat disagree, or strongly disagree: I feel that Chinese government officials have access to enough relevant information about the U.S. and the state of U.S.-China relations.



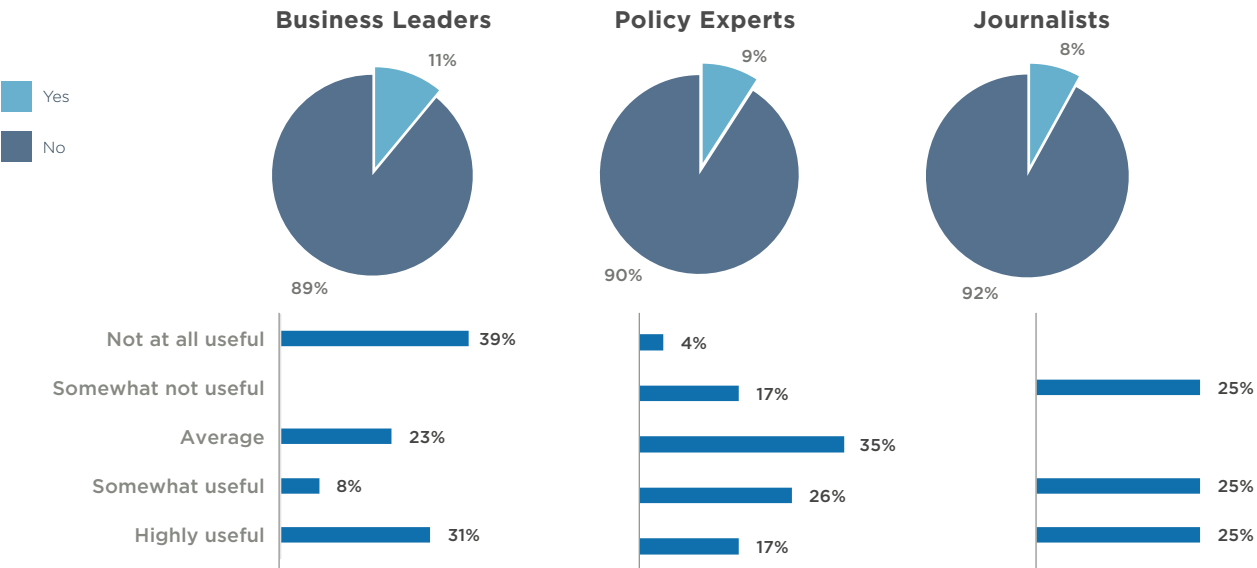
7.4 HOW USEFUL IS EXCHANGE WITH CHINESE / U.S. OFFICIALS?




U.S. QUESTION:

Have you ever communicated directly with Chinese officials on U.S.-China issues?

IF YES: How would you rate the usefulness of your exchange with Chinese officials?

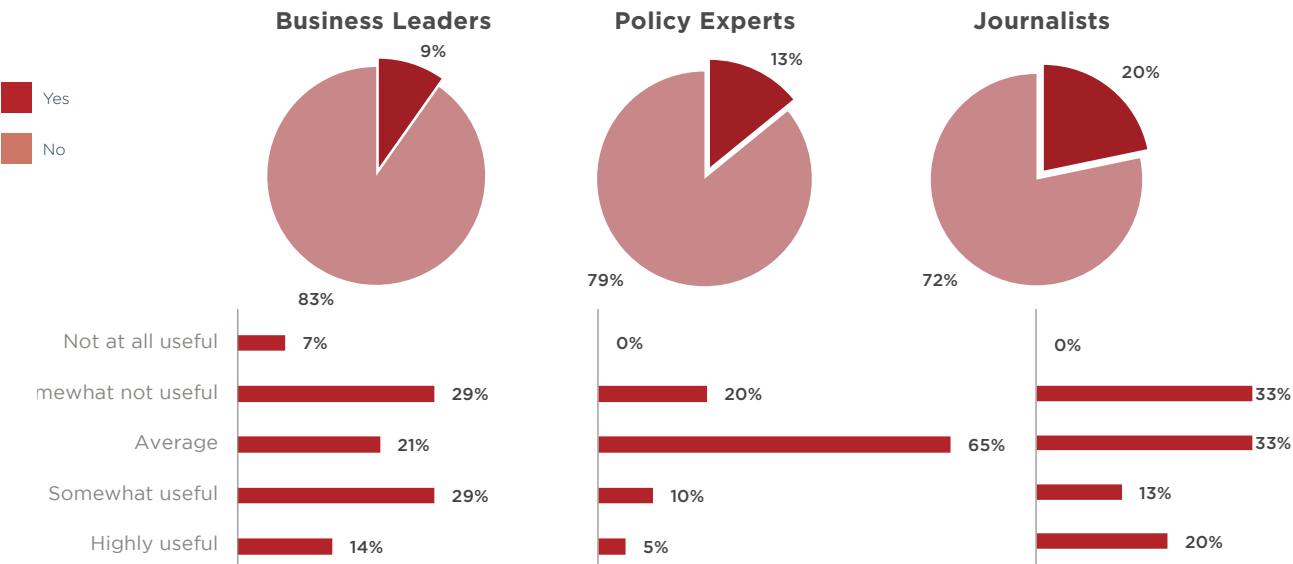




CHINA QUESTION:

Have you ever communicated directly with the U.S. government officials on U.S.-China issues?

IF YES: How would you rate the usefulness of your exchange with the U.S. officials?

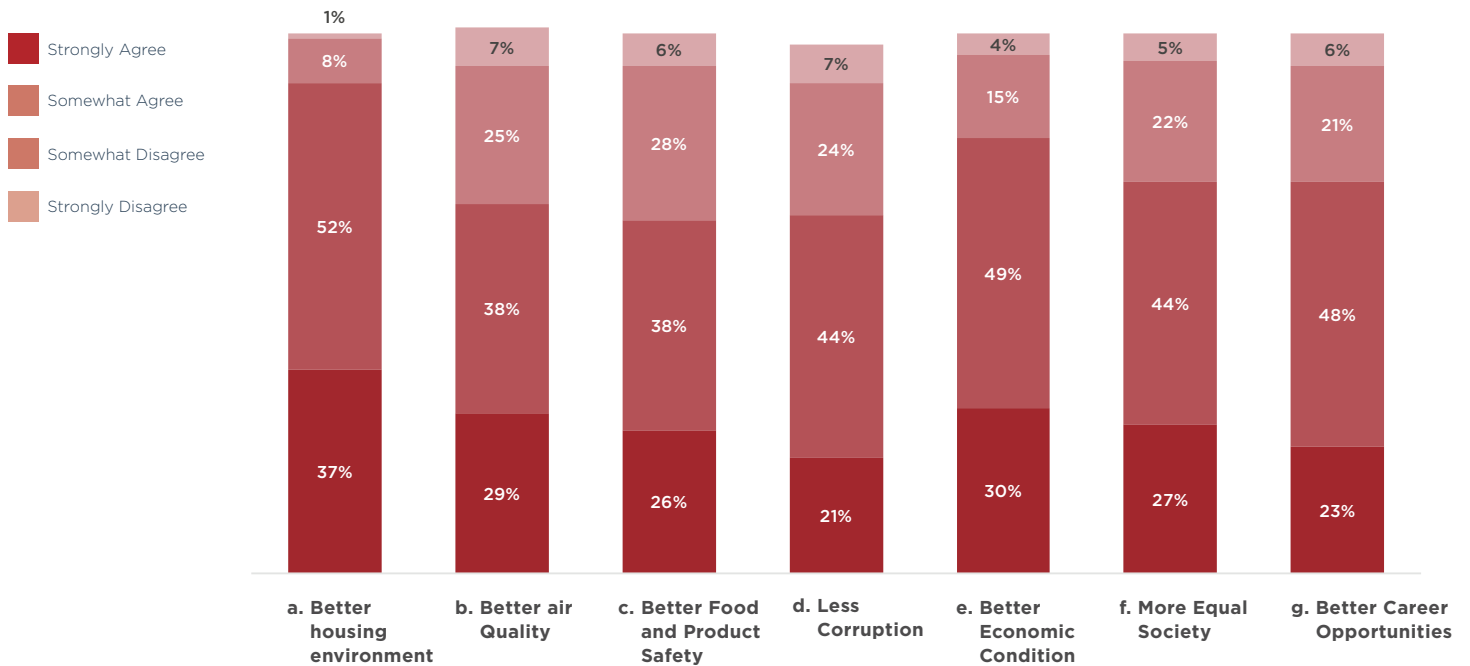


7.5 WILL CHINA'S FUTURE GENERATIONS BE BETTER OFF?



CHINA QUESTION:

I would like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. The next generation will have:



APPENDIX: METHODOLOGY

For the 2017 survey publication, the Committee of 100 collaborated with Brunswick Insights to conduct the English-language national survey in the United States. The data for the national China survey are drawn from Dataway Horizon’s own continuous self-sponsored and annually released survey on China’s global views, “The World in Chinese Eyes.”

The 2017 survey covered 79 questions, 53 of which were asked in both the U.S. and China, 11 in the United States only, and 15 in China only. About 80% of the survey questions in 2017 were repeated from the 2012 survey.

Overall Survey Method

Country	U.S.				China			
Audiences	General Public	Business Leaders	Policy Experts	Journalists	General Public	Business Leaders	Policy Experts	Journalists
Sample Size	1019	122	251	50	3696	150	150	75
Margin of Error	±3.07%	N/A	N/A	N/A	±1.47%	N/A	N/A	N/A
Survey Timing	November 18, 2016 – December 20, 2016				December 6, 2016 – January 9, 2017			
Methodology	Telephone, administered using a computer-assisted telephone interviewing system (CATI)				Face-to-face household interviews		Face-to-face and phone interviews	

UNITED STATES SURVEY METHODOLOGY

General Public:

The survey was administered by telephone between November 18th and December 20th, 2016 among a national representative sample consisting of 1,019 US respondents, 18 years of age and over. The methodology uses both landline and cell phone sample. Data were collected among each respondent to understand whether they had a landline only, cell phone only, or both, and to what extent they used each type of line to ensure each of these groups was appropriately represented in the data. A Random-Digit-Dialing (landline) sample fails to represent those who only have cell phones and tends to under-represent those who have landlines but use cell phones for the majority of their calls. The cell phone sample frame, in addition to capturing the cell phone only group, allows

adequate representation of “cell phone mostly” individuals as well. According to the most recent data from the National Health Interview Survey conducted by the Center of Disease Control and Prevention, approximately 49% of US adults have a cell phone only, and another 17% of the population uses a cell phone for the majority of their calls. The final sample consisted of 661 who only use landlines, 358 who only use cell phones. Results were weighted for age, gender, race, education, household size, region, income, and telephone status (landline and cell phone) where necessary to align them with their actual proportions in the population. The margin of error is plus or minus 3.07 percentage points at 95 percent level of confidence.

Business Leaders:

The survey was administered between November 18th and December 20th, 2016 with a sample of 122 business influencers nationwide. The sample includes 102 executives and senior level decision makers and 20 respondents randomly selected from trade associations and groups, chambers of commerce and economic development groups.

Policy Experts:

The survey was administered between November 18th and December 20th, 2016 with a sample of 251 policy experts nationwide. The sample includes influential leaders from academia, government, think tanks, non-governmental organizations, public affairs, and advocacy groups. Within each subgroup, respondents were randomly selected from purchased sample lists and were screened for their level of familiarity on current issues facing China.

Journalists:

The survey was administered between November 18th and December 20th, 2016 with a sample of 50 respondents comprised of those who work in news media or journalism. Respondents included are those who work in both top tier and local journalism and work in both online and print media.

U.S. Respondent Profile

The following tables list the demographic characteristics of all audiences: General Public, Business Leaders, Policy Experts, and Journalists. The General Public results were weighted as needed for age, gender, race/ethnicity, education, region, and telephone status where necessary to represent the national population of adults.

U.S. Respondent Profile

	General Public (n=1019)	Business Leaders (n=122)	Policy Experts (n=251)	Journalist (n=50)
Gender				
Male	49%	78%	62%	54%
Female	51%	22%	38%	46%
Age				
18-34	31%	5%	19%	25%
35-54	36%	53%	34%	20%
55+	33%	42%	47%	55%
Mean	45.9	52.4	51.6	51.9
Ethnicity				
White	75%	90%	76%	80%
Black/African American	12%	5%	8%	8%
Hispanic	14%	3%	9%	4%
Asian	5%	--	2%	2%
Hawaiian/Pacific Islander	--	--	--	2%
Native American	1%	2%	2%	2%
Two or more races	2%	2%	10%	4%
Political Affiliation				
Republican	27%	29%	24%	18%
Democrat	36%	26%	45%	34%
Independent	33%	43%	28%	42%
Education				
High school or less	19%	4%	1%	8%
Some college	29%	8%	18%	10%
College degree	26%	36%	30%	58%
Post graduate	26%	52%	51%	24%
Union Member				
Yes	14%	6%	16%	6%
No	86%	93%	84%	94%

CHINA SURVEY METHODOLOGY

General Public:

The survey was conducted between December 12, 2016- January 9, 2017 through face-to-face interviews with a general population sample of 3696 Chinese adults aged 18+ excluding Tibet, Xinjiang, Hong Kong, Macao and Taiwan. The sample was constructed using a multistage random sampling method. Primary sampling units (PSUs) are administrative units (prefectural-level cities, county-level cities and counties) stratified by regional-economic zones and type of administrative unit. Four provincial-level cities are selected with certainty. The number of effective PSUs is 70. Secondary sampling units (SSUs) are residential community. Probability Proportionate to Size Sampling (PPS) and Simple Random Sampling method are both used in sample design. The margin of error is plus or minus 1.47% at 95% level of confidence.

Business Leaders:

The survey was conducted between December 12, 2016- January 9, 2017 around all of China through face-to-face and telephone interviews with a sample of business leaders. The sample was based on executives and senior level decision makers from corporations in different industries and of different system of ownership.

Policy Experts:

The survey was conducted between December 12, 2016- January 9, 2017 around all of China through face-to-face and telephone interviews. The sample was comprised of 150 Policy Experts (Academia group, 60; Government group, 50; Think tanks, NGOs and advocacy groups group, 40).

Journalists:

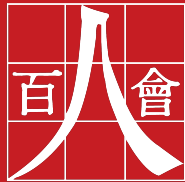
The survey was administered between December 12, 2016 - January 9, 2017 around all of China through face-to-face and telephone interviews. The sample comprised of 75 journalists, those who work in national or local news media in both online and print media.

China Respondent Profile

The following tables list the demographic characteristics of all audiences: General Public, Business Leaders, Policy Experts, and Journalists.

	General Public (n=3696)	Business Leaders (n=150)	Policy Experts (n=150)	Journalist (n=75)
Gender				
Male	50%	78%	71%	59%
Female	50%	22%	29%	41%
Age				
18-29	27%	16%	2%	16%
30-39	25%	34%	30%	61%
40-49	21%	36%	36%	16%
50-59	23%	11%	25%	1%
60+	4%	2%	6%	5%
Education Primary School and Below				
High school or less	14%	0%	0%	0%
Some college	58%	12%	5%	4%
College degree	26%	47%	29%	67%
Post graduate	1%	39%	67%	29%
Communist Party Member				
Yes	7%			
No	92%			

Note: Complete datasets and additional analyses available at Committee100.org



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