

# USHINA

**PUBLIC PERCEPTIONS**

---

OPINION SURVEY 2012



*Committee of 100*

# TABLE OF CONTENTS

- 4 THE COMMITTEE OF 100
- 6 METHODOLOGY
- 12 EXECUTIVE SUMMARY
- 14 RECOMMENDATIONS

## 1 OVERALL IMPRESSIONS

- 17 OVERALL IMPRESSIONS HIGHLIGHTS
- 20 GENERAL IMPRESSIONS OF EACH COUNTRY
- 21 ASSESSMENT OF GENERAL PUBLIC'S IMPRESSIONS
- 22 US INITIAL THOUGHTS ON CHINA
- 23 CHINA INITIAL THOUGHTS ON THE US
- 24 INTERNATIONAL IMAGE
- 24 US GLOBAL INFLUENCE
- 25 CULTURAL IMPACT
- 26 VISITATION
- 27 CHANGE OF OPINION AFTER VISITATION
- 28 FUTURE WORLD SUPERPOWER
- 29 FUTURE LEADING POWER ASIA PACIFIC REGION
- 30 CHINA'S FUTURE ROLE IN THE GLOBAL ECONOMY
- 31 CHINA'S GROWING MILITARY POWER

## 2 MUTUAL INTERESTS AND CONCERNS

- 33 MUTUAL INTERESTS AND CONCERNS HIGHLIGHTS
- 36 IMPORTANCE TO EACH OTHER

- 37 MUTUAL TRUST
- 38 TRUSTING CHINA
- 39 TRUSTING THE UNITED STATES
- 40 GREATEST CONCERNS
- 41 COMMON INTERESTS
- 42 POTENTIAL CONFLICTS

## 3 US-CHINA POLICY

- 45 US-CHINA POLICY HIGHLIGHTS
- 48 AMERICAN POLICY TOWARD CHINA
- 49 CURRENT TRENDS IN US-CHINA RELATIONS
- 50 RESPONSIBILITY FOR WORSENING OF RELATIONS
- 51 US GOVERNMENT HANDLING OF BILATERAL RELATIONS
- 52 CHINA GOVERNMENT HANDLING OF BILATERAL RELATIONS
- 53 ENVIRONMENT: GLOBAL WARMING
- 54 ENVIRONMENT: US GOVERNMENT PERFORMANCE
- 55 ENVIRONMENT: CHINA'S GOVERNMENT PERFORMANCE
- 56 US INTERVENTION IN TAIWAN
- 57 US INVOLVEMENT IN CHINA-TAIWAN RELATIONS
- 58 CURRENT CROSS-STRAIT RELATIONS
- 59 SOLUTION TO THE TAIWAN ISSUE
- 60 US MILITARY PRESENCE IN THE ASIA PACIFIC
- 61 SUPPORT FOR US MILITARY PRESENCE IN THE ASIA PACIFIC

## **4 TRADE AND INVESTMENT**

- 63 TRADE AND INVESTMENT HIGHLIGHTS
- 66 TRADE BENEFICIAL
- 67 TRADE BENEFICIAL TO CONSUMER
- 68 TRADE DEFICIT
- 69 CHINESE PRODUCT SAFETY (MODIFIED)
- 70 OUTSOURCING CAUSES JOB LOSS
- 71 OUTSOURCING IF COST INCREASES
- 72 INVESTMENT: STIMULATION OF ECONOMIES
- 72 INVESTMENT: LOSS OF US TECHNOLOGICAL ADVANTAGE TO A COMPETITOR
- 73 INVESTMENT: CLOSER TIES BETWEEN THE TWO SUPERPOWERS
- 73 INVESTMENT: INCREASE CHINESE PURCHASE OF US TREASURY BONDS
- 74 INVESTMENT: RISK OF AMERICA LOSING CONTROL OVER ITS OWN ECONOMY
- 74 INVESTMENT: CHINESE INVESTMENT IN THE US
- 75 INVESTMENT: CONSEQUENCES OF CHINESE INVESTMENT
- 75 INVESTMENT: SAFETY IN US SECURITIES
- 76 DOING BUSINESS: CONCERNS IN CHINA
- 77 DOING BUSINESS: CONCERNS IN THE US
- 78 INTELLECTUAL PROPERTY RIGHTS
- 79 CHINA'S GROWING ECONOMY

## **5 MEDIA SOURCES**

- 81 MEDIA SOURCES HIGHLIGHTS
- 84 MEDIA SOURCES
- 85 PERCEIVED TRUTH IN CHINA MEDIA REPORTING
- 86 PERCEIVED TRUTH IN US MEDIA REPORTING
- 86 US ACCESS TO INFORMATION ON CHINA
- 87 USEFULNESS OF COMMUNICATION WITH CHINESE OFFICIALS

## **6 DOMESTIC VIEWS**

- 89 DOMESTIC VIEWS HIGHLIGHTS
- 92 EACH NATION'S CURRENT LIFE GOALS
- 93 EACH NATION'S MOOD ON DIRECTION
- 94 TOP ISSUES FOR THE US
- 95 TOP ISSUES FOR CHINA
- 96 US VIEWS OF CHINA'S EMERGING MIDDLE CLASS
- 97 CHINESE VIEWS OF CHINA'S EMERGING MIDDLE CLASS
- 98 CHINA: SUPERPOWER'S ROLE
- 99 CHINA: GROWING ENVIRONMENT FOR CHINESE YOUTH
- 100 US: PERCEPTION OF CHINESE AMERICANS
- 100 US: TEACHING CHINESE AT LOCAL SCHOOLS
- 101 US: CHILDREN TAKING CHINESE IN SCHOOLS
- 101 US: VIEW OF TEACHING CHINESE IN SCHOOLS

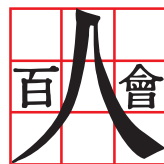
# THE COMMITTEE OF 100

The Committee of 100 (C-100) is a national non-partisan, non-profit membership organization comprised of prominent Chinese Americans in a broad range of professions.

---

With their knowledge and experience, the Committee has dedicated its efforts to a dual mission:

- (1) encouraging constructive relations between the peoples of the United States and Greater China, and
- (2) encouraging the full participation of Chinese Americans in all aspects of American life.



*Committee of 100*

677 Fifth Avenue, 5th Floor  
New York, NY 10022  
tel: 212-371-6565  
fax: 212-371-9009  
[www.committee100.org](http://www.committee100.org)

The Committee of 100's Opinion Survey measures American and Chinese perceptions of US-China relations. The 2012 Opinion Survey bears timely relevance with US-China relations as a pivotal issue in this year's US presidential and congressional elections and China's political leadership transition.

The key findings of this year's survey underscore the United States and China as strategic stakeholders. Pragmatic partnership between Washington and Beijing requires bilateral trust-building based on common ground and mutual benefits. The survey has identified constructive cooperation is essential in managing complex bilateral and global challenges in the days ahead.

In reviewing this year's survey highlights, it is reassuring to know that over 50% of the American and Chinese public respondents have favorable views of each other's country and culture. This survey confirms the positive impact of people-to-people diplomacy and educational exchanges in building bilateral trust and understanding.



My deepest appreciation is expressed to the C-100 Survey Project Committee, led by Co-Chairs Charlie Woo, Jeremy Wu and Frank Wu, for their commitment in overseeing this year's survey project. Jeremy Wu's subject-matter expertise, unflagging dedication and intellectual leadership ensured the project's rigorous analytic standard and execution. Director of Research, Mercy Kuo, adeptly managed and integrated the project's myriad moving parts with research assistance from colleague Fannie Chen. Executive Director Angelica Tang provided strategic input and optimal support to produce high-impact results.

This year's survey marks the inaugural inclusion of interactive online capabilities for viewers to navigate 2012 and 2007 survey data on the C-100 Survey micro-site.

We appreciate your interest in the C-100 Opinion Survey 2012 and look forward to partnering with you to continue bridging progress between the United States and China.

Sincerely,

A handwritten signature in black ink, appearing to be 'Dominic Ng', written over a white background.

Dominic Ng  
Chairman  
Committee of 100

# THE SURVEY

The Committee of 100's opinion survey project began in 1994 and produced opinion surveys in 2001, 2005, 2007, and 2012.

---

The objective of this study is to determine American attitudes toward China, and, as a "mirror," measure Chinese attitudes toward America on key issues in US-China relations and salient domestic issues in both countries. The target respondent groups in both countries include general public, opinion leaders and business leaders with a stand-alone sample of the US policy community.

The survey findings provide unique, comprehensive and comparative information that can be used to enhance US-China relations and formulate recommendations on how to forge mutually beneficial partnerships, including leader-to-leader, people-to-people, organization-to-organization, and many others to foster greater understanding and build trust between the United States and China.

# METHODOLOGY

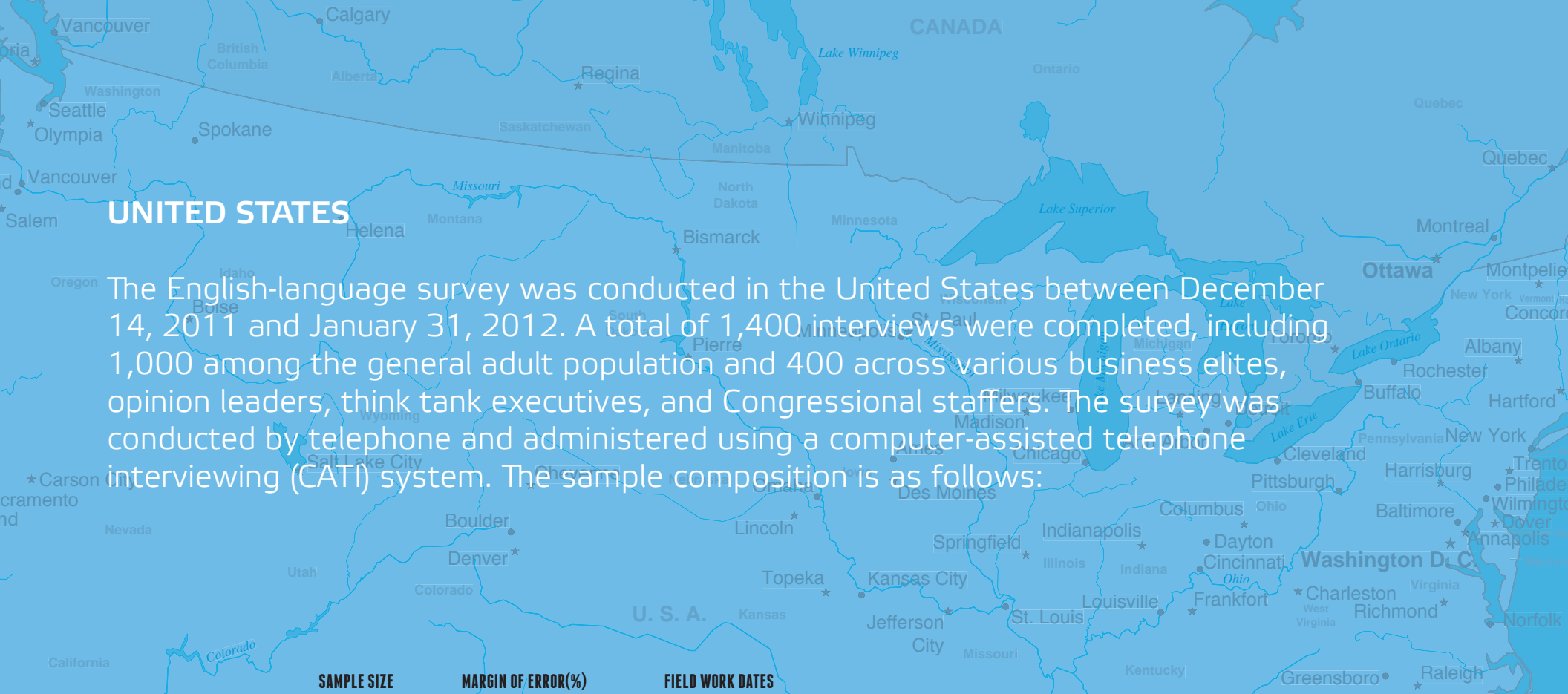
The Committee of 100 enlisted the services of Harris Interactive to conduct the English-language survey in the United States and Horizon Research Consultancy Group to conduct the Chinese-language survey in China.

The 2012 survey covered 75 questions, 49 of which were asked in both the US and China, 19 in the United States only, and 7 in China only. The 2007 survey had 65 questions, about 80 percent of which were repeated in the 2012 survey and several with slight modification in wording.

---

The *US-China Public Perceptions Opinion Survey 2012* is an update to the 2007 survey entitled *Hope and Fear: American Attitudes Toward China*.

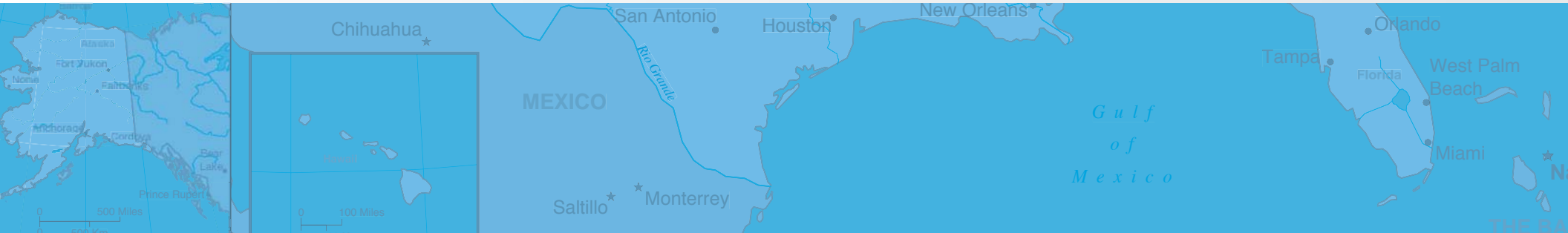
To view complete datasets and analysis of the 2012 and 2007 Surveys, visit C-100's Survey micro-site at **[www.committee100.org](http://www.committee100.org)**.



# UNITED STATES

The English-language survey was conducted in the United States between December 14, 2011 and January 31, 2012. A total of 1,400 interviews were completed, including 1,000 among the general adult population and 400 across various business elites, opinion leaders, think tank executives, and Congressional staffers. The survey was conducted by telephone and administered using a computer-assisted telephone interviewing (CATI) system. The sample composition is as follows:

	SAMPLE SIZE	MARGIN OF ERROR(%)	FIELD WORK DATES	
GENERAL PUBLIC	1,000	± 3.0	1/19/2012 – 1/31/2012	
OPINION LEADERS	244	± 6.2	12/14/2011 – 1/31/2012	
BUSINESS LEADERS	120	± 8.9	12/14/2011 – 1/31/2012	
POLICYMAKERS	36	± 16.2	12/14/2011 – 1/31/2012	



## GENERAL PUBLIC

The survey was administered by telephone between January 4 and January 19, 2012 among a national representative sample consisting of 1,000 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 30% of US adults have a cell phone only, and another 20% of the population uses a cell phone for the majority of their calls. The final sample consisted of 500 who only use landlines, 246 who only use cell phones and 254 who also use either. 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 3.0 percentage points at 95 percent level of confidence.

## ELITES

### Business Leaders

The survey was administered between December 14, 2011 and January 31, 2012 with a sample of 120 business elites nationwide. The sample includes 100 executives and senior level decision makers in corporations ranging in size from 500 - 5000+ employees and 20 respondents randomly selected from trade associations and groups, lobbying firms, chambers of commerce and economic development groups. The margin of error is plus or minus 8.9 percentage points and the response rate is 10%.

### Opinion Leaders

The survey was administered between December 14, 2011 and January 31, 2012 with a sample of 244 opinion elites nationwide. The sample includes influential leaders from media, academia, non-governmental organizations, interest groups, foundations and the public sector. Within each subgroup

respondents were randomly selected from purchased sample lists and were screened for their level of familiarity on current issues facing China. The margin of error is plus or minus 6.2 percentage points and the response rate is 12%.

### Policymakers

The survey was administered between December 14, 2011 and January 31, 2012 with a sample of 36 respondents comprised of 18 Congressional staffers and 18 think tank respondents. Due to office policy and the Congressional calendar, the Congressional Staffer segment experienced lower than projected response rates, making it difficult to achieve the desired number of respondents. Think tanks were included as part of the “policy community” to supplement the Congressional sample. Congressional staffers are comprised of randomly selected staff including chiefs of staff, senior advisors, legislative counsels, directors and assistants from purchased Congressional staff lists. Think tanks are comprised of C-suite executives, board members, chairmen, executive directors, presidents, vice presidents, controllers, assistant controllers, chiefs of staff, directors and assistant directors purchased from sample lists. The margin of error is plus or minus 16.2 percentage points and the response rate is 7%.

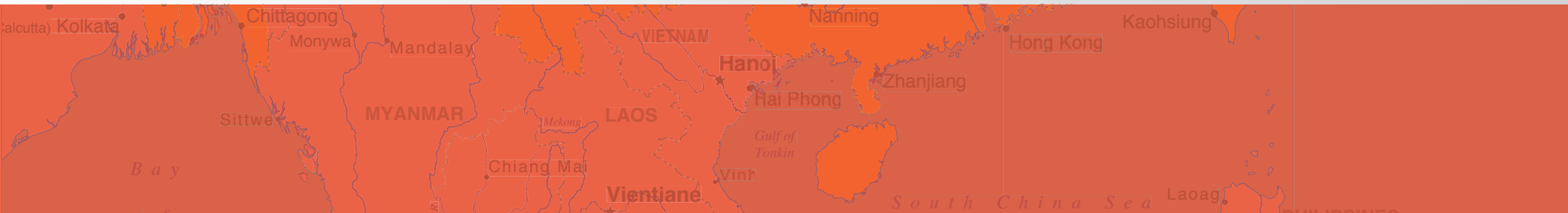




# CHINA

The Chinese-language survey was conducted in China between December 12, 2011 and January 16, 2012. A total of 4,153 interviews were completed, including 3,775 among the adult population and 378 across various business elites and opinion leaders. The survey was conducted by face-to-face and telephone interviews. The sample composition is as follows:

	SAMPLE SIZE	MARGIN OF ERROR(%)	FIELD WORK DATES	
GENERAL PUBLIC	3,775	± 1.7	12/17/2011 – 12/27/2011	
OPINION LEADERS	216	N/A	12/12/2011 – 1/16/2012	
BUSINESS LEADERS	162	N/A	12/12/2011 – 1/16/2012	



## GENERAL PUBLIC

The survey was conducted between December 17 and December 27, 2011 through face-to-face interviews with a general population sample of 3,775 Chinese adults aged 18-60. The sample was constructed using a multistage random sampling method, including respondents from 12 prefectural-level cities, 12 towns, and 12 villages. The approach of disproportional sampling of the urban population did not include Hong Kong, Macau, Tibet, and Xinjiang. The margin of error is plus or minus 1.7 percentage points at 95 percent level of confidence.

## ELITES

### Business Leaders

The survey was conducted between December 12, 2011 and January 16, 2012 in Beijing, Shanghai and Guangzhou, through face-to-face and telephone interviews with a sample of 162 business elites. The sample was based on executives and senior level decision makers from corporations in different industries (service, high value-added service, manufacturing, retail and trade, as well as other industries) and of different system of ownership (state-owned enterprises, private enterprises and foreign-invested enterprises or joint ventures).

### Opinion Leaders

The survey was conducted between December 12, 2011 and January 16, 2012 through face-to-face interviews and telephone interviews with a sample of 216 opinion leaders in Beijing, Shanghai and Guangzhou. The sample was comprised of: 69 social sciences experts from universities and research institutions; 62 senior journalists and editors covering cultural, social, political, economic, or foreign affairs issues from provincial level news organizations; 44 supervisors, project managers and senior staff from domestic or international non-governmental organizations working on cultural, social, political, economic, or foreign affairs; and 41 professionals, mainly including accountants, lawyers and project managers in law firms, accounting firms and consultation firms.

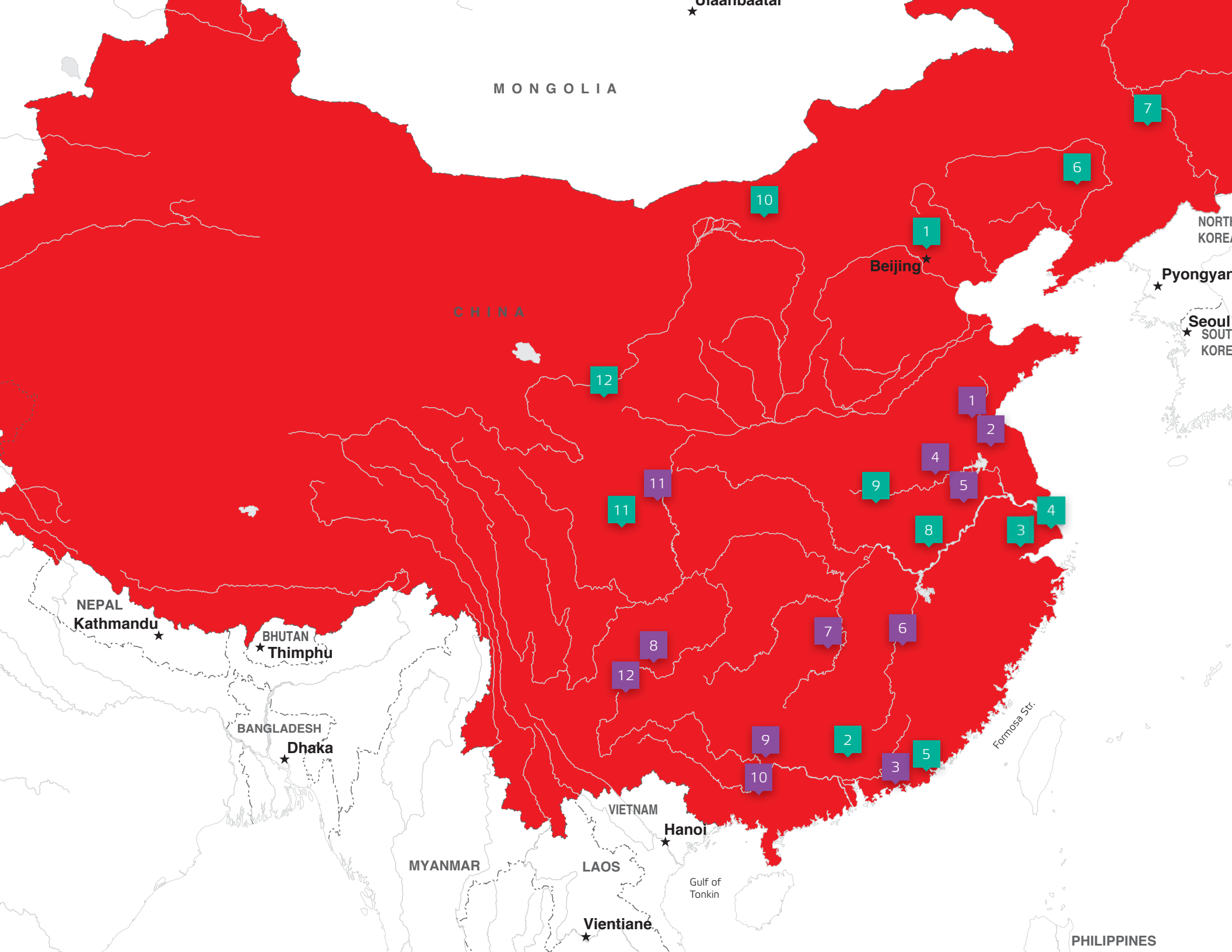
## 12 SAMPLE DIJI CITIES

- 1 **BEIJING**
- 2 **GUANGZHOU, GUANGDONG**
- 3 **HANGZHOU, ZHEJIANG**
- 4 **SHANGHAI**
- 5 **SHANTOU, GUANGDONG**
- 6 **SHENYANG, LIAONING**
- 7 **CHANGCHUN, JILIN**
- 8 **WUHAN, HUBEI**
- 9 **XIANGYANG, HUBEI**
- 10 **BAOTOU, INNER MONGOLIA**
- 11 **CHENGDU, SICHUAN**
- 12 **LANZHOU, GANSU**

## 12 SAMPLE XIANJI CITIES

- 1 **CANGSHAN, LINYI, SHANDONG**
- 2 **DONGHAI, LIANYUNGANG, JIANGSU**
- 3 **PUNING, JIEYANG, GUANGDONG**
- 4 **DANCHENG, ZHOUKOU, HENAN**
- 5 **FUNAN, FUYANG, ANHUI**
- 6 **FENGCHENG, YICHUN, JIANGXI**
- 7 **XINHUA, LOUDI, HUNAN**
- 8 **BIJIE, ANSHUN, GUIZHOU**
- 9 **GUIPING, GUIGANG, GUANGXI**
- 10 **LINGSHAN, ZINSHOU, GUANGXI**
- 11 **SANTAI, MIANYANG, SICHUAN**
- 12 **XUANWEI, QUJING, YUNNAN**

INDIA



MONGOLIA

CHINA

NEPAL  
Kathmandu

BHUTAN  
Thimphu

BANGLADESH  
Dhaka

MYANMAR

LAOS

Vientiane

VIETNAM  
Hanoi

Gulf of  
Tonkin

Formosa Str.

PHILIPPINES

Beijing

Pyongyang  
Seoul  
SOUTH KOREA

NORTH KOREA

# EXECUTIVE SUMMARY

The re-establishment of US-China relations in 1971 marked a strategic step that ended China's isolation and transformed the global balance of power. Since that historic milestone, the United States as an established superpower and China as an emerging global power stand at the crossroads of cooperation and competition. Washington and Beijing understand the high stakes and hard choices involved in finding common ground amid global market uncertainty, security risks and domestic pressures.

In this pivotal year of political leadership transition unfolding in the United States and China, the Committee of 100's Opinion Survey 2012 provides timely insight into American and Chinese attitudes toward each other on high-impact issues. This year's survey takes a comparative look at US and Chinese public and elite perceptions based on C-100's mirror surveys conducted by American and Chinese polling firms in 2007 and 2012. In examining and integrating both years' data and findings, C-100 has identified four overarching themes, presented in this executive summary, that characterize American and Chinese perceptions.

These core themes underpin the report's six sections: Overall Impressions, Mutual Interests and Concerns, US-China Policy, Trade and Investment, Media Sources, and Domestic Views. Each section contains thematic highlights that encapsulate key data findings.

## SHARED GLOBAL LEADERSHIP

Converging consensus between American and Chinese respondents confirms China's emergence as a global superpower and expanding influence in the global economy. The Chinese public has growing confidence about China's status, but American public and elites have strong concerns and suspicions toward China's future economic and military roles. As an established global superpower, the United States questions its current direction. Chinese elites anticipate US global leadership will continue over the next 20 years, but the Chinese public believes US global influence has decreased over the past ten years.

## FAVORABLE VIEWS, RESERVED TRUST

The United States and China are almost evenly divided on the level of trust towards each other; they hold differing views and values on complex issues ranging from the pursuit of personal goals to the national direction. Compared to 2007, an increasing proportion of the American public accepts China as a rising power and wants a collaborative relationship, but a growing percentage of the Chinese public believes the US is trying to prevent China from becoming a great power. The two peoples are skeptical about their own governments in handling the bilateral relationship, as well as their own national media in the truthfulness of reporting about each other. Despite these differences, the overall view toward each other remains favorable.

## DOMESTIC CONCERNS, DIVIDED VIEWS

Each nation is facing complex domestic concerns and divided views. Jobs and the economy are the top US concerns, followed by the budget deficit, campaign finance, political gridlock, among others. The Chinese public's top domestic concern is corruption; Chinese business leaders cite HIV and communicable diseases; Chinese opinion leaders identify morality issues and Taiwan.

## HOPES & FEARS ON ECONOMIC & MILITARY ISSUES

The United States and China share hopes and fears on important bilateral issues, especially economic and military. An overwhelming majority of American and Chinese public and elites believe trade is mutually beneficial, but concerns about trade deficit, intellectual property protection, job losses, product safety, and corruption also make trade the leading source of bilateral conflict. With China being the largest holder of US debt, the Chinese public does not believe US Treasury bonds are safe investments. Although a large majority of American elites expect Chinese investment in the US will create jobs and improve US-China ties, the American public is concerned about potential loss of US technological advantage or even control of its economy. American respondents believe US military presence is expected to help maintain security in the Asia Pacific, but the Chinese view it as a major concern for future conflicts. American respondents in 2012 believe China-Taiwan relations are a strategic issue in US-China relations, while the Chinese public and elites express more confidence that the issue is evolving towards peaceful resolution.

The well-being of the United States and China is now deeply intertwined. Each is recognized as the other's most important partner. Both countries need each other more than ever to resolve global challenges.

# RECOMMENDATIONS

---

As the United States and China stand at the crossroads of strategic challenges and choices, seeking common ground and collaboration can forge a path of partnership and progress. Seeking common ground amid fundamental differences has helped stabilize US-China relations since bilateral rapprochement. The survey's findings identify opportunities for collaboration and building trust in three primary areas.

## 1

### EDUCATIONAL EXCHANGE

Cultural visitations and educational exchanges have proven to build understanding and favorable impressions between both countries. The two nations strongly believe China's emerging middle class will have profound impact on future political and social changes. Mutual interchanges between the American and Chinese middle class – professionals, students, teachers, journalists, civic and business leaders – foster greater awareness and mitigate misunderstandings. In particular, business leaders in the US and China have built a solid foundation of mature understanding and mutual respect for each other over the last 40 years. They have among the highest favorable impressions of each other and offer many ideas to improve bilateral relations.

---

## 2 PUBLIC DIPLOMACY

People-to-people diplomacy allows both countries' citizens to understand each other through face-to-face dialogue and internet interaction. Public diplomacy is a critical tool to dispel biased views and basic misconceptions of both countries and their people. The internet is playing an increasingly important role in both nations as an information source beyond the traditional communications media. As an integral component of public diplomacy, social media serves as a gateway to real-time interactive dialogue.

## 3 LEADERSHIP DEVELOPMENT

Learning the Chinese language is welcomed in the United States. A sizable number of Chinese public and elites believe the US offers Chinese youth with better opportunities and growth. Language learning provides the foundation for an emerging generation of leaders in both countries to communicate and understand each other's culture and values. Training American and Chinese youth in language and leadership skills cultivates both countries' future leaders.

**1**

**OVERALL  
IMPRESSIONS**



# HIGHLIGHTS

---

## CONSENSUS ON A RISING CHINA

A large majority of American and Chinese public and elites agree China will have leading influence in the Asia Pacific region 20 years from now. China will have the most influence over the global economy in the next 20 years by a smaller-margin consensus. The US will remain the world's leading superpower over the next 20 years according to US and Chinese elites.

## CHINA'S FUTURE ROLE IN GLOBAL ECONOMY

US and Chinese business leaders anticipate China will become the world's largest consumer society 20 years from now. Chinese business leaders have substantially lower expectations than US business leaders in China becoming the world's largest exporter.

## CHINA AS EMERGING MILITARY POWER

A strong majority of the American public and elites consider China's emergence as a military power to be a serious or potential threat. However, the proportion of the American public who views it as little or no threat has risen to 30% from 20% in 2007.

## US AS FUTURE GLOBAL SUPERPOWER

Despite the rapid rise of China, a majority of the American public and elites think the US will remain the world's leading superpower 20 years from now. A majority of the Chinese elites share the same view of future US leadership. Fifty-eight percent of the Chinese public, however, believe China will become the world's future leading superpower.

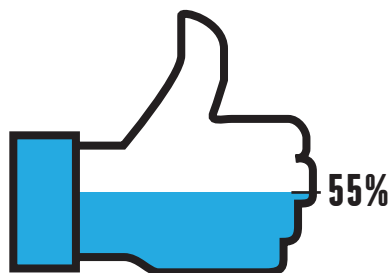
## FAVORABLE IMPRESSIONS OF EACH OTHER

Fifty-five percent of the American public holds a favorable view of China. Fifty-nine percent of the Chinese public holds a similarly positive view of the US, although almost half of the Chinese public believes that US global influence has decreased over the past ten years.

## FAVORABLE IMPRESSIONS OF EACH OTHER

p 20

HOW WOULD YOU DESCRIBE YOUR IMPRESSION OF CHINA?



Fifty-five percent of the American public holds a favorable view of China.



Fifty-nine percent of the Chinese public holds a similarly positive view of the US, although almost half of the Chinese public believes that US global influence has decreased over the past decade.

## PERCEIVED INTERNATIONAL IMAGE

p 24

WHICH COUNTRY CURRENTLY HAS A BETTER INTERNATIONAL IMAGE?



A majority of American public and elites believe the US has a better international image than China. A majority of the Chinese public believes the opposite is true, but Chinese elites are divided on this perception.

## GENERAL PUBLIC AND ELITES DISCONNECT

p 21

HOW WOULD YOU DESCRIBE THE CHINESE PUBLIC'S OPINION OF THE US?

**CHINA**  
BUSINESS LEADERS  
**82%**  
FAVORABLE

GENERAL PUBLIC  
**59%**  
FAVORABLE

HOW WOULD YOU DESCRIBE THE AMERICAN PUBLIC'S OPINION OF CHINA?

**US** BUSINESS LEADERS  
**20%**  
FAVORABLE

GENERAL PUBLIC  
**55%**  
FAVORABLE

US elite groups tend to underestimate the US public's favorable view of China. China's elite groups tend to overestimate the Chinese public's favorable views of the United States. This pattern is consistent between the 2007 and 2012 surveys.

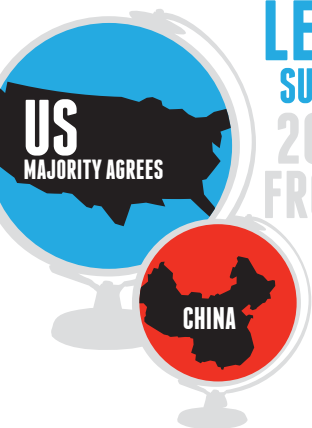
## US AS FUTURE GLOBAL SUPERPOWER

p 28

WHICH NATION OR POLITICAL REGION DO YOU THINK WILL BE THE WORLD'S LEADING SUPERPOWER 20 YEARS FROM NOW?

DESPITE CHINA'S RAPID RISE,

A MAJORITY OF AMERICAN PUBLIC AND ELITES AND CHINESE ELITES THINK THE US WILL REMAIN THE WORLD'S LEADING SUPERPOWER 20 YEARS FROM NOW.



## CONSENSUS ON RISING CHINA

p 29

WHICH ONE OF THE FOLLOWING COUNTRIES DO YOU EXPECT TO HAVE THE GREATEST DEGREE OF INFLUENCE IN THE EAST ASIAN REGION 20 YEARS FROM NOW?

MAJORITIES IN THE US AND CHINA AGREE

CHINA WILL HAVE THE GREATEST DEGREE OF INFLUENCE IN THE EAST ASIAN REGION 20 YEARS FROM NOW.

CHINA 2032!



## FUTURE ROLE OF CHINA IN GLOBAL ECONOMY

p 30

IN YOUR OPINION, WHAT WILL BE CHINA'S ROLE IN THE GLOBAL ECONOMY 20 YEARS FROM NOW?

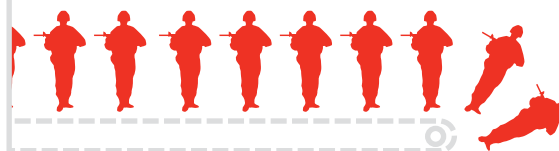
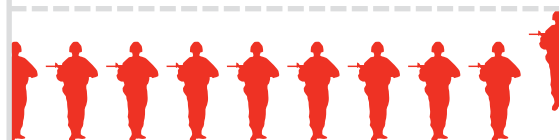
BOTH THE US AND CHINA THINK CHINA WILL BECOME THE WORLD'S LARGEST CONSUMER SOCIETY



## CHINA'S MILITARY EMERGENCE

p 31

HOW DO YOU VIEW CHINA'S EMERGENCE AS A MILITARY POWER—AS A SERIOUS THREAT TO THE US, A POTENTIAL THREAT, NO THREAT OR AS AN ALLY OF THE US?

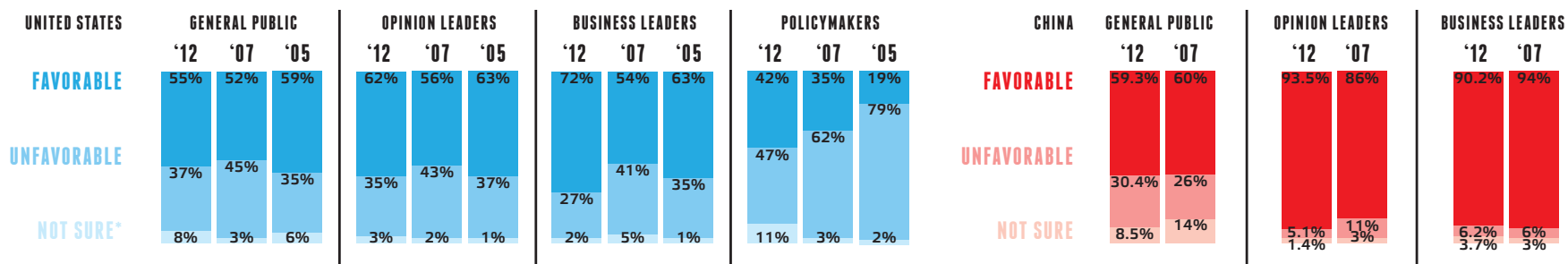


A strong majority of the American public and elites consider China's emergence as a military power to be a serious or potential threat. However, the proportion of the American public who views it as little or no threat has risen to 30% from 20% in 2007.

# OVERALL IMPRESSIONS

**USHINA**  
PUBLIC PERCEPTIONS  
OPINION SURVEY 2012

# GENERAL IMPRESSIONS OF EACH COUNTRY



*\*US figures include respondents who indicated "not sure" or "decline to answer"*

## BASE QUESTION

### HOW WOULD YOU DESCRIBE YOUR IMPRESSION OF CHINA?

## US

Favorable opinion has increased among all US respondent groups since 2007, particularly among business leaders (from 54% to 72%).

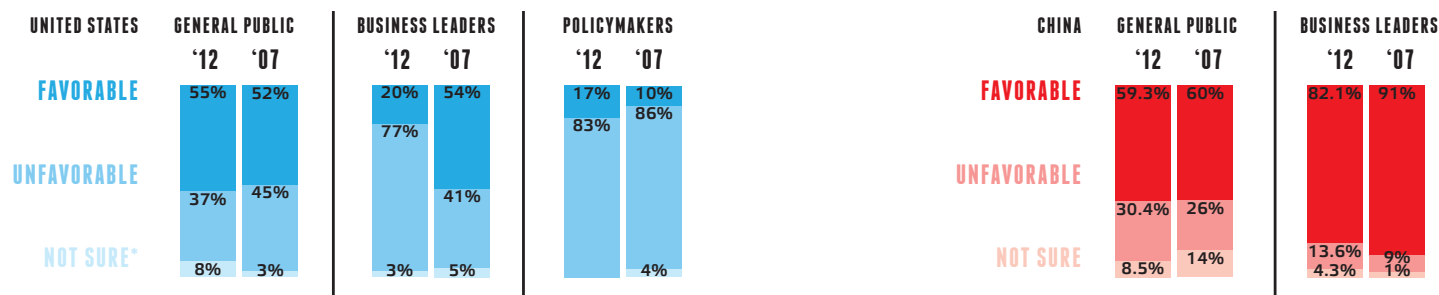
Unfavorable opinion decreased significantly in the US since 2007 across all groups: public (45% to 37%); opinion leaders (43% to 35%); and business leaders (41% to 27%).

## CHINA

While favorable opinion among the general public has held steady between 2007 and 2012 at 60% and 59.3%, respectively, unfavorable opinion has increased slightly by 4.6%.

Favorable opinion among opinion leaders (93.5%) and business leaders (90.2%) remains high, although the level decreased slightly by 3.8% among business leaders since 2007.

# ASSESSMENT OF GENERAL PUBLIC'S IMPRESSIONS



*\*US figures include respondents who indicated "not sure" or "decline to answer"*

## BASE QUESTION

ASKED OF AMERICAN  
BUSINESS LEADERS &  
CONGRESSIONAL STAFFERS:

**HOW WOULD YOU DESCRIBE  
THE AMERICAN PUBLIC'S  
OPINION OF CHINA?**

ASKED OF CHINESE  
BUSINESS LEADERS:

**HOW WOULD YOU DESCRIBE  
THE CHINESE PUBLIC'S  
OPINION OF THE US?**

## US

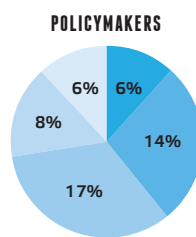
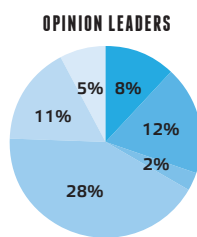
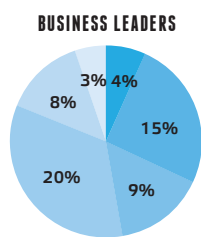
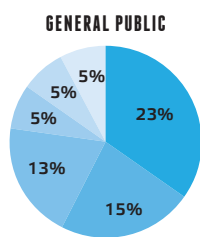
Elites believe about 20% of the US public views China favorably. In actuality, 55% of the public reports favorable views of China.

## CHINA

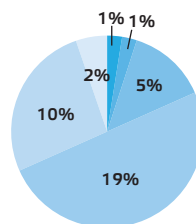
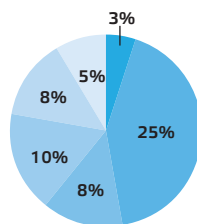
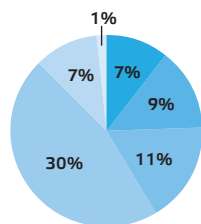
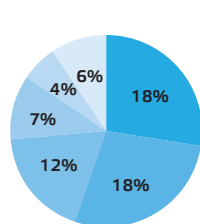
Business leaders believe about 82% of the public holds favorable views of the US. In actuality, about 59% of the public reports favorable views of the US.

# US INITIAL THOUGHTS ON CHINA

2012



2007



## US

Culture, history, food, and the Great Wall are the first things that come to mind for the American public (23%).

- Culture / History / Food / Great Wall
- Large Country / Large Population / Overpopulation / Adoption
- Cheap Products / Large Amount of Imports / Wal-Mart
- Economic Growth / Booming Economy
- Trade Imbalance / US Trade Deficit / Debt
- Authoritarian / Communist / Mao

*Only responses having 5% or greater are listed. See appendix for full list.*

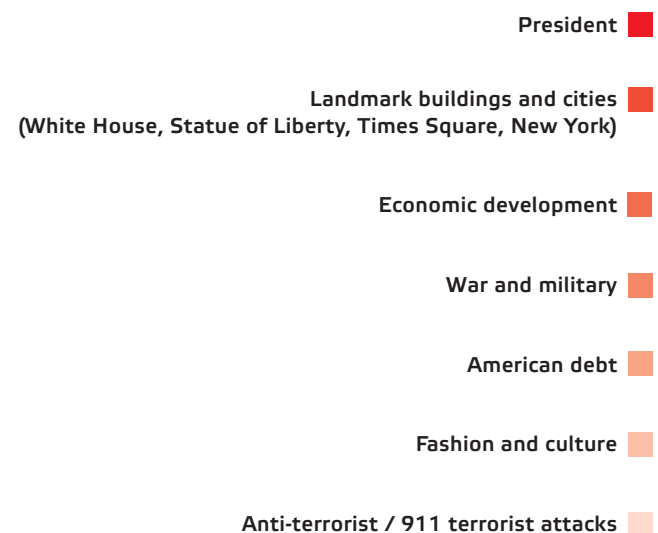
## BASE QUESTION

**WHAT IS THE FIRST THING THAT COMES TO MIND WHEN YOU THINK OF CHINA?**

# CHINA INITIAL THOUGHTS ON THE US

## CHINA

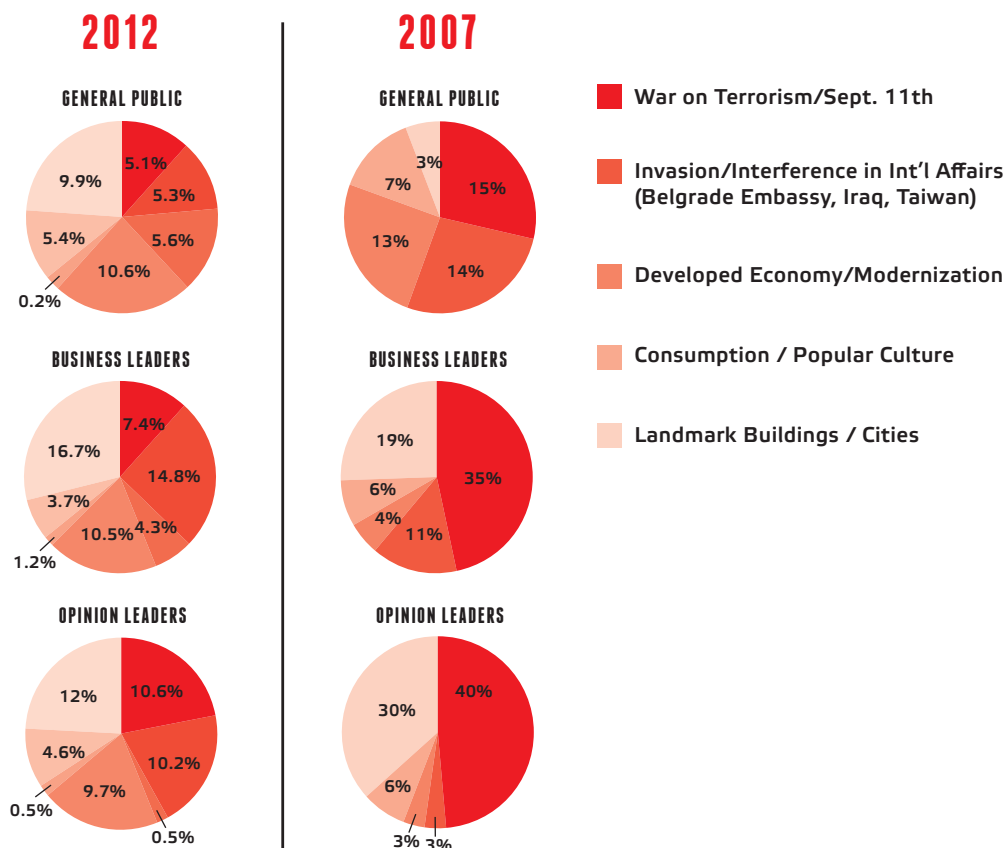
War and the military are the first thoughts that come to mind for the Chinese public (10.6%), consistent with 2007.



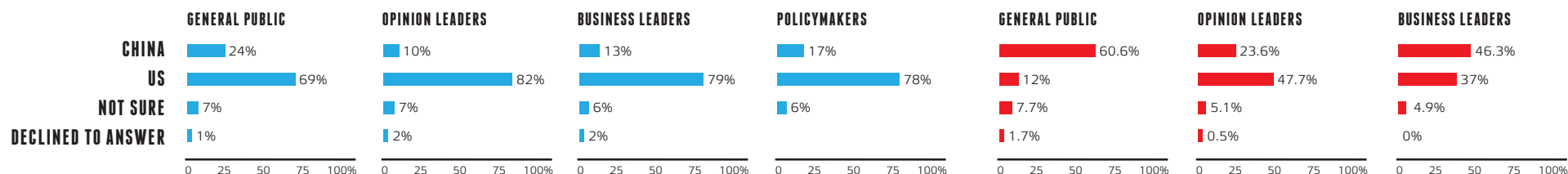
Only responses having 5% or greater are listed.  
See appendix for full list.

### BASE QUESTION

**WHEN YOU THINK OF THE US,  
WHAT IS THE FIRST THING  
THAT COMES TO MIND?**



# INTERNATIONAL IMAGE



## BASE QUESTION

**WHICH COUNTRY CURRENTLY HAS A BETTER INTERNATIONAL IMAGE?**

## US

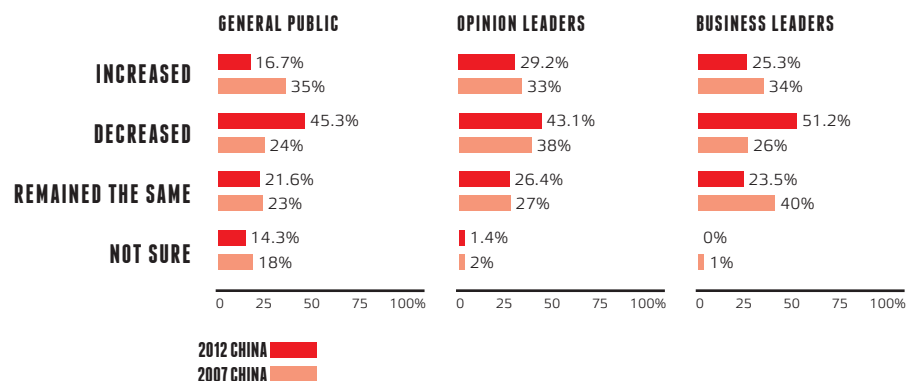
Sixty-nine percent of the public and about 80% of elites perceive the US having a better international image than China.

## CHINA

Sixty-one percent of the public report China having a better international image than the US.

Forty-eight percent of opinion leaders cite the US as having a better international image, but 46.3% of business leaders cite China as having the better image.

# US GLOBAL INFLUENCE



## BASE QUESTION

**IN YOUR OPINION, OVER THE PAST TEN YEARS, HAS THE INFLUENCE OF THE US IN THE WORLD INCREASED, REMAINED ABOUT THE SAME, OR DECREASED?**

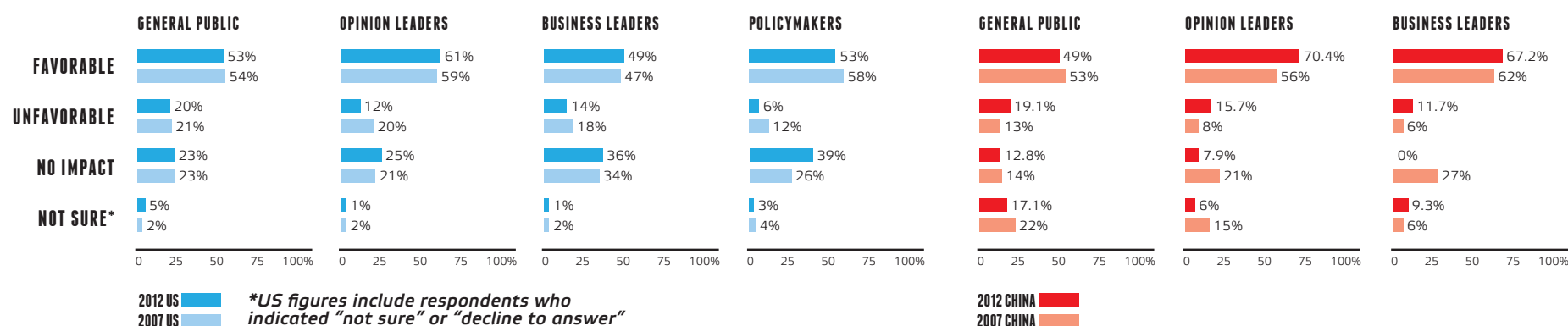
## CHINA

More than 25% of Chinese elites think US global influence has increased, while 45.3% of the public think it has decreased.

Over 50% of business leaders and 43.1% of opinion leaders think US influence has decreased over the past ten years.



# CULTURAL IMPACT



## BASE QUESTION

### US SURVEY:

**WOULD YOU SAY THE IMPACT OF CHINESE CULTURE ON THE US HAS BEEN FAVORABLE OR UNFAVORABLE, OR HAS IT HAD NO IMPACT?**

### CHINA SURVEY:

**WOULD YOU SAY THE IMPACT OF AMERICAN CULTURE ON CHINA HAS BEEN FAVORABLE OR UNFAVORABLE, OR HAS IT HAD NO IMPACT?**

## US

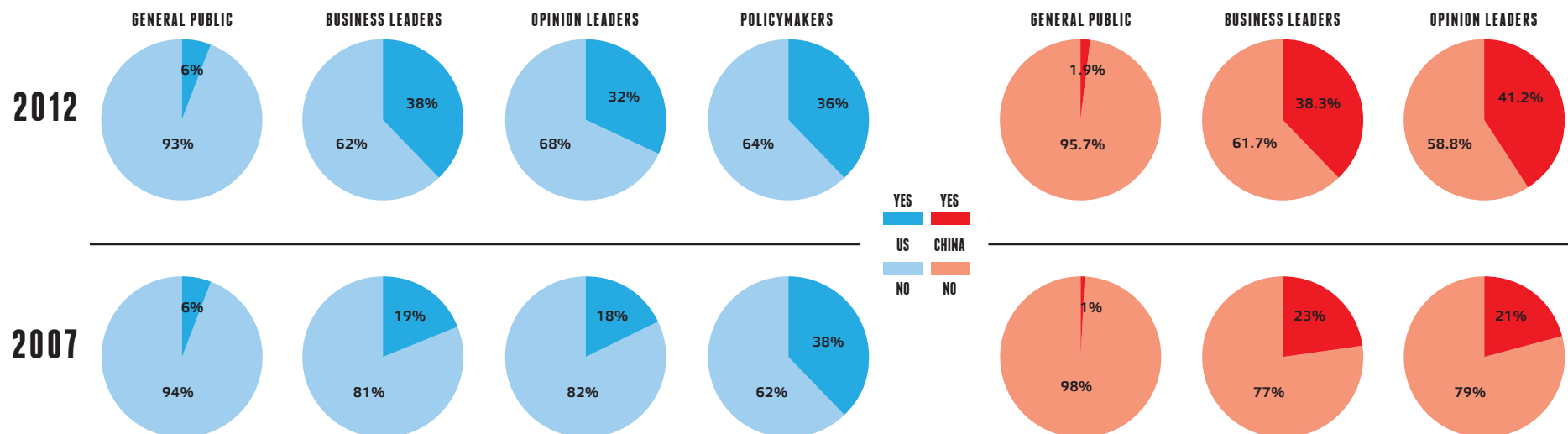
A greater percentage of opinion leaders (61%) than business leaders (49%) believe Chinese culture has had a favorable impact on the US.

## CHINA

A greater percentage of Chinese elites than the public believe American culture has had a favorable impact on China.

Although a clear majority of elites think the impact of American culture on China has been favorable, the percentage saying the impact has been unfavorable almost doubled from 2007 to 15.7% (opinion leaders) and 11.7% (business leaders).

# VISITATION



## BASE QUESTION

US SURVEY:  
**HAVE YOU EVER VISITED  
MAINLAND CHINA?**

CHINA SURVEY:  
**HAVE YOU EVER VISITED  
THE US?**

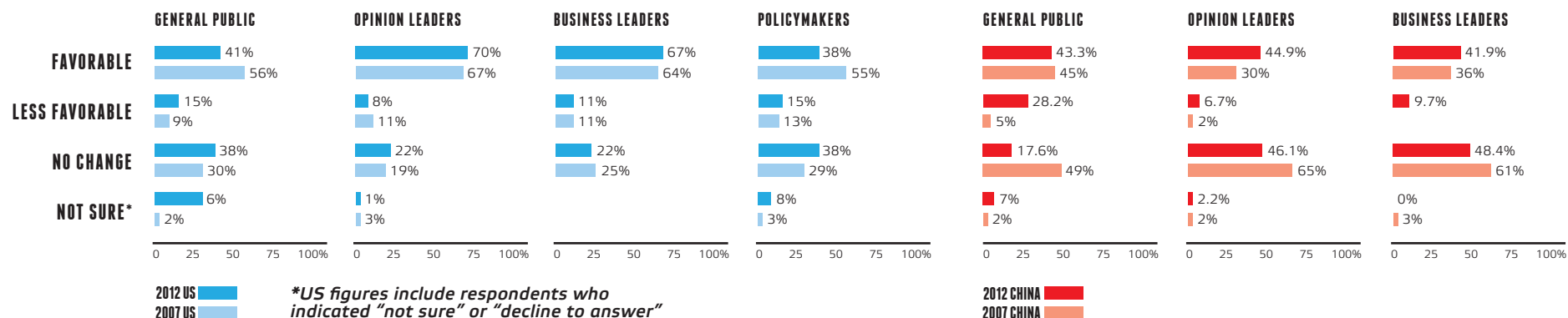
## US

The percentage of opinion (32%) and business leaders (38%) who have visited China almost doubled between 2007 to 2012.

## CHINA

About 40% of elites have visited the US, increasing from about 20% in 2007.

# CHANGE OF OPINION AFTER VISITATION



## BASE QUESTION

ASKED OF AMERICANS WHO HAVE VISITED MAINLAND CHINA:

**AFTER VISITING MAINLAND CHINA, IS YOUR IMPRESSION OF CHINA MORE FAVORABLE, LESS FAVORABLE, OR WAS THERE NO CHANGE?**

ASKED OF THE CHINESE WHO HAVE VISITED THE US:

**AFTER VISITING THE US, IS YOUR IMPRESSION OF THE US MORE FAVORABLE, LESS FAVORABLE, OR WAS THERE NO CHANGE?**

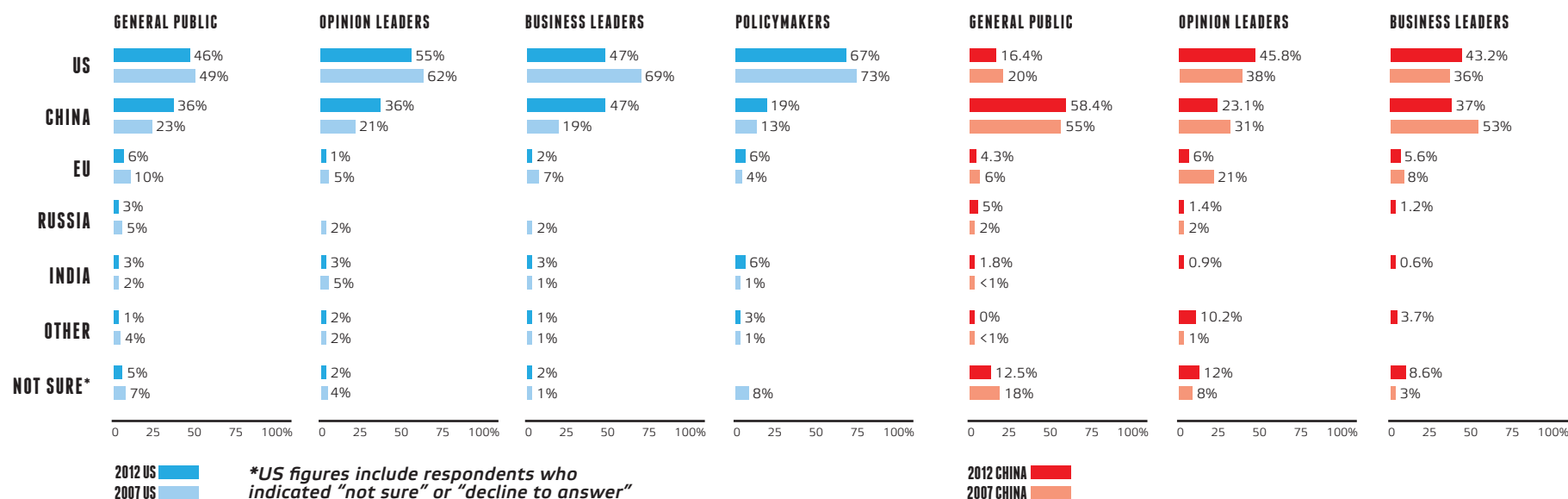
## US

Approximately two-thirds of elites report improved opinions about China after their visit.

## CHINA

About 28% of the Chinese public who visited the US reports less favorable impressions after their visit, compared to only 5% in 2007.

# FUTURE WORLD SUPERPOWER



## BASE QUESTION

**WHICH NATION OR POLITICAL REGION DO YOU THINK WILL BE THE WORLD'S LEADING SUPERPOWER TWENTY YEARS FROM NOW?**

## US

Belief that the US will be the future leading superpower decreased most significantly among opinion (62% to 55%) and business leaders (69% to 47%).

Business leaders are evenly divided on whether the US (47%) or China (47%) will be the leading superpower.

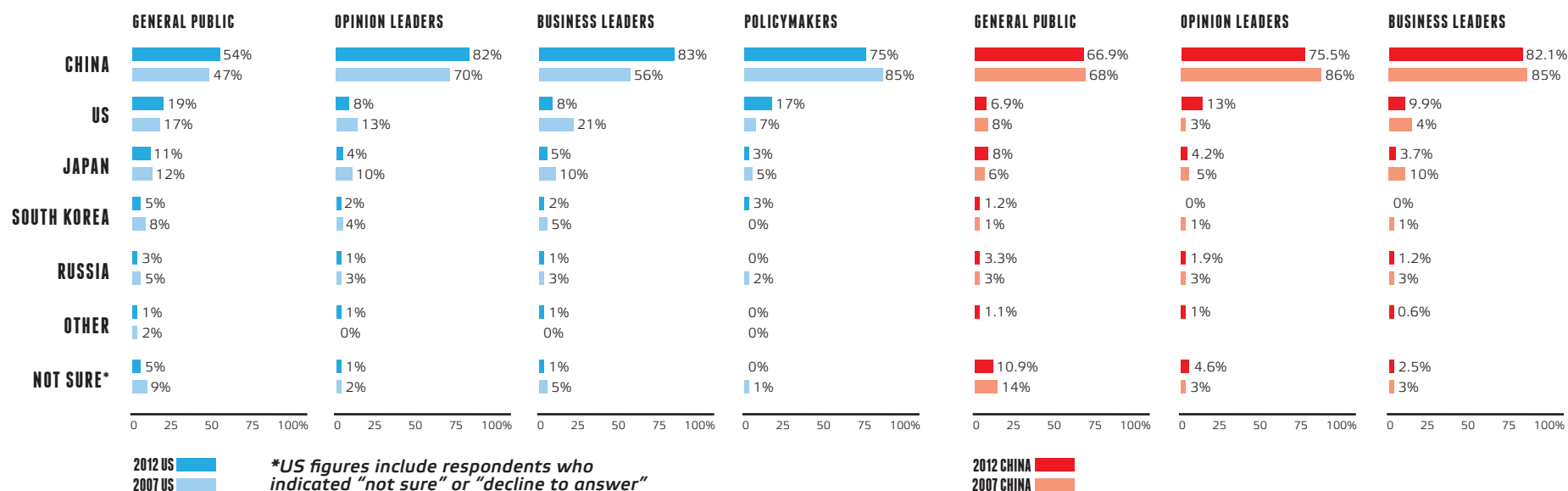
Belief that China will be the world's leading superpower in 20 years increased among all respondent groups since 2007.

## CHINA

Belief that the US will be the future leading superpower decreased among the public by 3.6%, but increased among opinion and business leaders by 7.8% and 7.2%, respectively.

Belief that China will be the future leading superpower decreased among opinion (31% to 23.1%) and business leaders (53% to 37%), but increased among the public (55% to 58.4%).

# FUTURE LEADING POWER ASIA PACIFIC REGION



## BASE QUESTION

**WHICH ONE OF THE FOLLOWING COUNTRIES DO YOU EXPECT TO HAVE THE GREATEST DEGREE OF INFLUENCE IN THE EAST ASIAN REGION TWENTY YEARS FROM NOW?**

## US

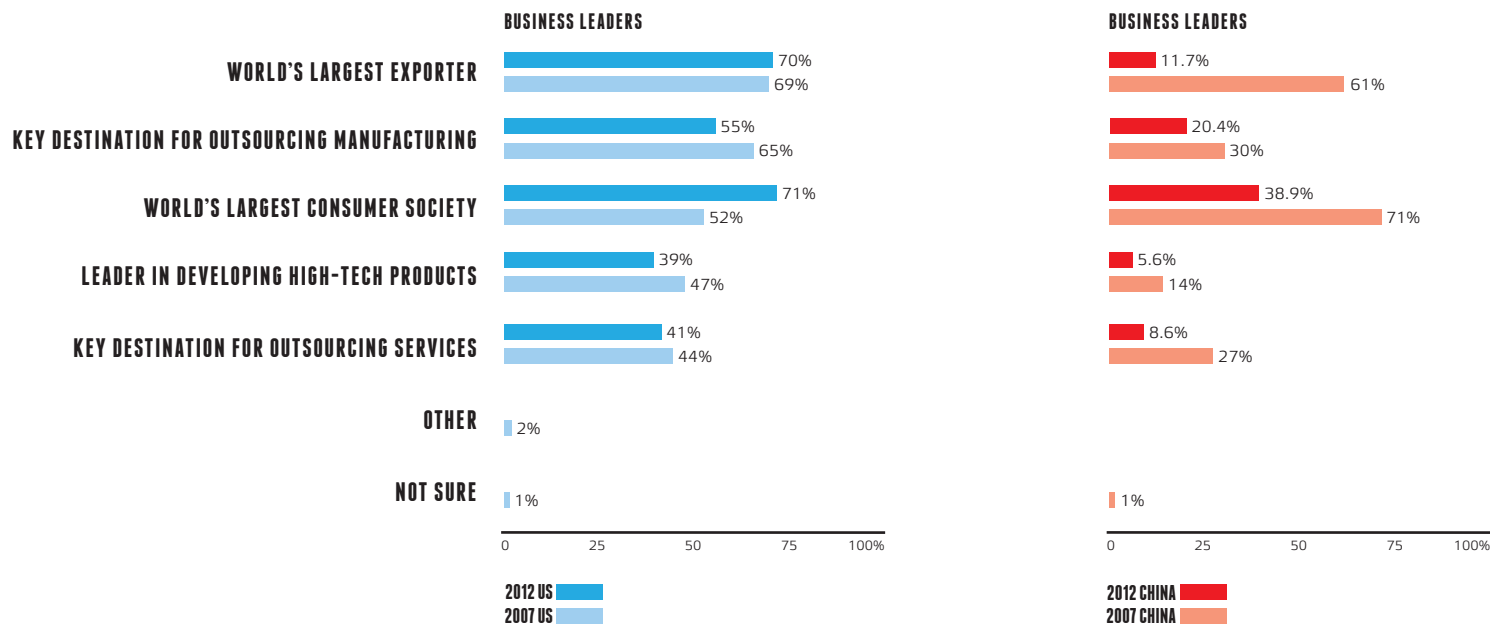
A majority of all US respondents think China will be the future leading power in the Asia Pacific over the next 20 years, an increase across all groups, except policymakers from 2007.

## CHINA

All respondent groups believe China will be the future leading power in East Asia, but 2012 percentages decreased compared to 2007: public (68% to 66.9%); opinion leaders (86% to 75.5%); business leaders (85% to 82.1%).

Elite opinion that the US will be the leading East Asian power increased among opinion leaders from 3% in 2007 to 13% in 2012 and business leaders from 4% to 9.9%, but decreased among the public from 8% to 6.9%.

# CHINA'S FUTURE ROLE IN THE GLOBAL ECONOMY



## BASE QUESTION

**IN YOUR OPINION, WHAT WILL BE CHINA'S ROLE IN THE GLOBAL ECONOMY TWENTY YEARS FROM NOW?**

## US

Business leaders perceive China's three most likely roles in the global economy to be: the world's largest consumer society (71%); the world's largest exporter (70%); and a key destination for outsourcing manufacturing (55%).

Seventy-one percent of business leaders (71%) think China's role in the global economy twenty years from now will be the "world's largest consumer society," compared to 52% in 2007.

## CHINA

Business leaders perceive the three most likely roles for China in the global economy to be: the world's largest consumer society (38.9%) and a key destination for outsourcing manufacturing (20.4%).

Perception of China's role as the world's largest exporter and largest consumer society both decreased dramatically from 61% to 11.7% and 71% to 38.9%, respectively, compared to 2007 data.

# CHINA'S GROWING MILITARY POWER

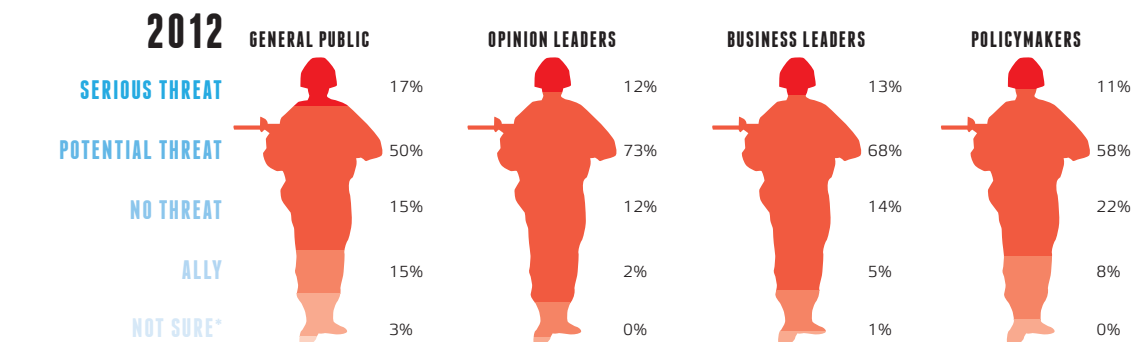
## BASE QUESTION

**HOW DO YOU VIEW CHINA'S EMERGENCE AS A MILITARY POWER—AS A SERIOUS THREAT TO THE US, A POTENTIAL THREAT, NO THREAT, OR AS AN ALLY OF THE US?**

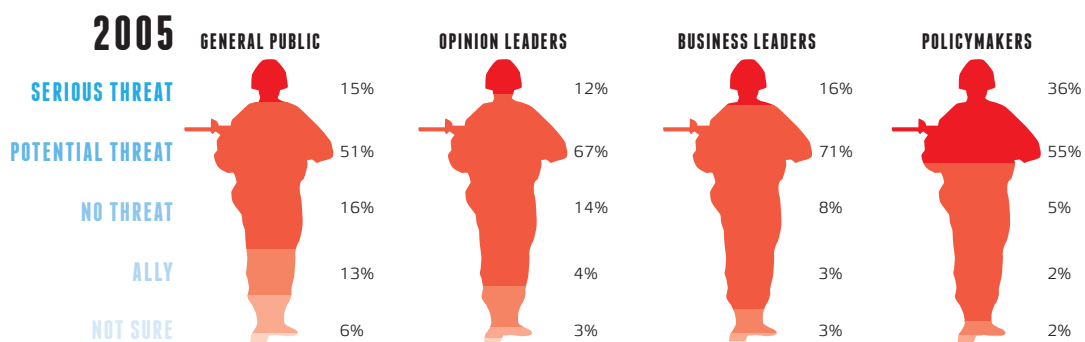
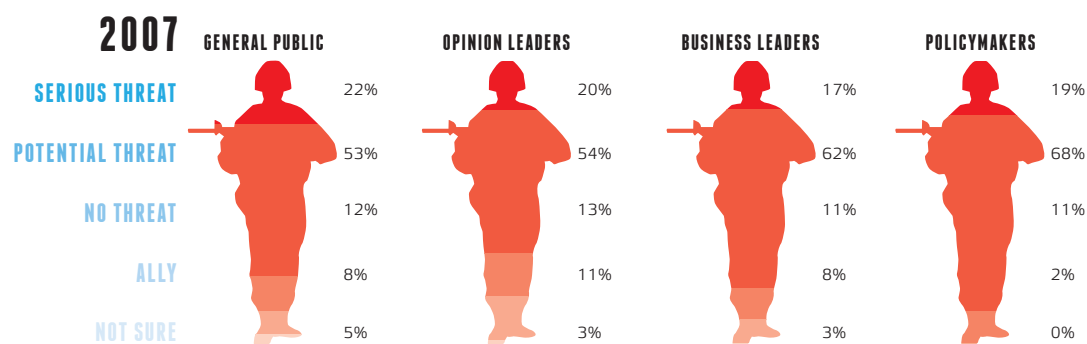
## US

The perception of China's military emergence as a serious threat to the US decreased among all respondent groups since 2007.

Opinion (73%) and business leaders (68%) view China's military power as a potential threat.



\*US figures include respondents who indicated "not sure" or "decline to answer"



COMPLETE DATASETS AND ADDITIONAL ANALYSIS AVAILABLE AT [COMMITTEE100.ORG](http://COMMITTEE100.ORG)

**2**

**MUTUAL INTERESTS  
AND CONCERNS**



# HIGHLIGHTS

---

## WORLD'S MOST IMPORTANT PARTNERSHIP

The United States' most important partner is China, surpassing Great Britain and Japan, according to American public and elites. China's most important global partner is the United States, followed by Russia, according to Chinese public and elites.

## GREATEST CONCERNS

Economic issues dominate US-China concerns. The top two US concerns are loss of jobs to China and the US trade deficit with China. The top two Chinese concerns are China's exchange rate policy and also the US trade deficit with China. Human rights remain a high US concern, while Taiwan remains a high Chinese concern.

## COMMON INTERESTS

The US and China share key common interests in trade, global financial stability, environment, energy, anti-terrorism, nuclear non-proliferation, education reform and security in the Asia Pacific region.

## POTENTIAL CONFLICTS

Many common interest areas are also potential conflict points for US respondents. Trade is a most likely source of conflict for all US respondents, while Chinese elites consider security in the Asia

Pacific as the greatest source of potential conflict. Taiwan remains a high potential conflict point for the Chinese public.

## MUTUAL TRUST AND LACK THEREOF

The American public is evenly divided on whether China should be trusted, with elites leaning toward less trust. The Chinese public and elites are also divided on whether or not to trust the US.

## IMPROVING MUTUAL TRUST

American and Chinese elites identify pragmatic actions to build mutual trust. For the US to trust China, American elites focus on improving transparency, human rights issues, fair trade, intellectual property protection, and fair currency policy. Chinese elites emphasize enhancing communication and cooperation, domestic economic development, trade, political reform, and open government. For China to trust the US, American elites indicate enhancing communications, understanding cultural differences, and improving fair trade, the trade deficit, and diplomatic cooperation. Similarly, Chinese elites urge communication and cooperation, non-interference in Chinese internal matters, reduced political posturing, respecting and understanding China, and avoiding strong-arm politics.

## GREATEST CONCERNS p 40

2 GREATEST US CONCERNS

**LOSS OF JOBS  
TO CHINA**

**US TRADE DEFICIT  
WITH CHINA**

**CHINA'S EXCHANGE  
RATE POLICY**

2 GREATEST CHINA CONCERNS

## POTENTIAL CONFLICTS p 42

**INDUSTRIAL ESPIONAGE  
CYBER-SECURITY**

**TRADE**

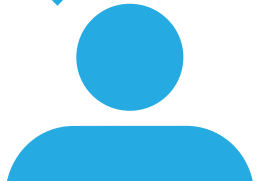
**SECURITY IN THE  
ASIA PACIFIC REGION**

**TAIWAN**

## MUTUAL TRUST AND LACK THEREOF

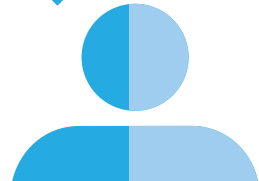
p 37

SOME TRUST



GENERAL PUBLIC

A LITTLE TRUST SOME TRUST



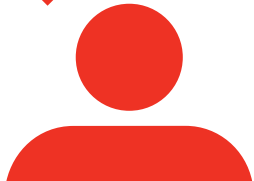
OPINION LEADERS

SOME TRUST



BUSINESS LEADERS

A LITTLE TRUST



GENERAL PUBLIC

SOME TRUST



OPINION LEADERS

SOME TRUST



BUSINESS LEADERS

## TRUSTING CHINA

p 38

## TRUSTING THE UNITED STATES

p 39

TO IMPROVE TRUST...



CHINA CAN IMPROVE  
**HUMAN RIGHTS ISSUES**  
INTELLECTUAL PROPERTY PROTECTION  
**FAIR CURRENCY POLICY**

BOTH COUNTRIES CAN IMPROVE  
**COMMUNICATIONS**  
**FAIR TRADE**

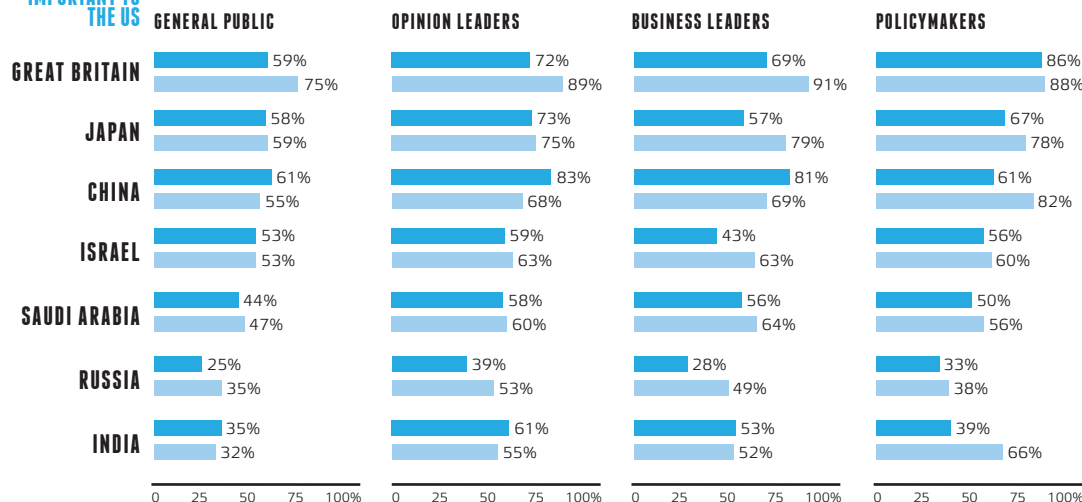
THE US CAN IMPROVE  
UNDERSTANDING  
CULTURAL DIFFERENCES  
**TRADE DEFICIT**  
DIPLOMATIC COOPERATION

MUTUAL  
**INTERESTS AND CONCERNS**

**USHINA**  
PUBLIC PERCEPTIONS  
OPINION SURVEY 2012

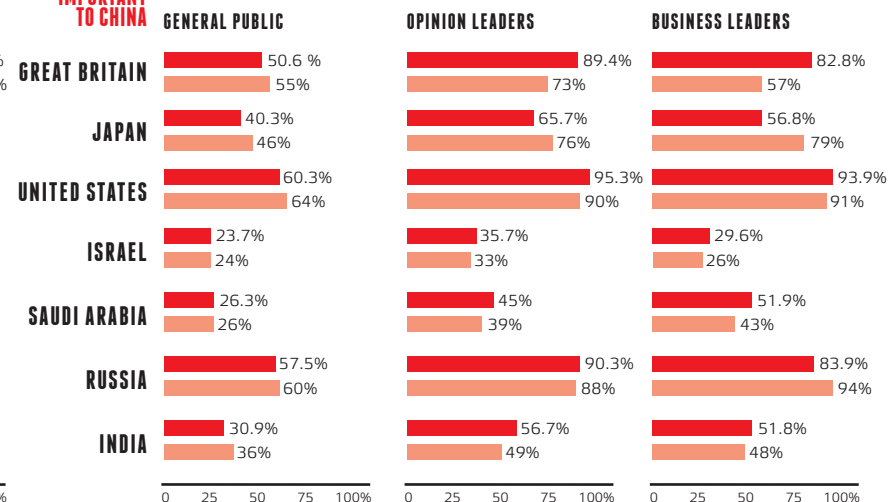
# IMPORTANCE TO EACH OTHER

## \*IMPORTANT TO THE US



2012 US ■ \*Important includes "Most Important" and "Very Important"  
2007 US ■

## \*IMPORTANT TO CHINA



2012 CHINA ■ \*Important includes "Most Important" and "Very Important"  
2007 CHINA ■

## BASE QUESTION

### US SURVEY:

**I AM GOING TO READ TO YOU A LIST OF COUNTRIES. FOR EACH, PLEASE TELL ME IF THEY ARE THE MOST IMPORTANT, A VERY IMPORTANT, A SOMEWHAT IMPORTANT, OR NOT AN IMPORTANT PARTNER TO THE US IN THE WORLD TODAY.**

### CHINA SURVEY:

**I AM GOING TO READ TO YOU A LIST OF COUNTRIES. FOR EACH, PLEASE TELL ME IF THEY ARE THE MOST IMPORTANT, A VERY IMPORTANT, A SOMEWHAT IMPORTANT, OR NOT AN IMPORTANT PARTNER TO CHINA IN THE WORLD TODAY.**

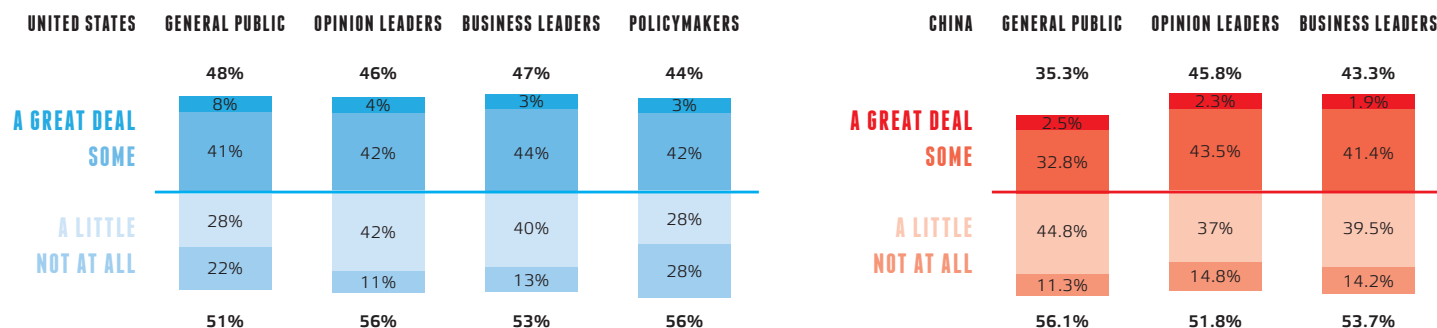
## US

The United States' most important partner is China, surpassing Great Britain and Japan, compared to 2007 data.

## CHINA

China's most important partner is the United States, with Russia in close second, for all Chinese respondent groups, particularly business leaders (93.9%).

# MUTUAL TRUST



## BASE QUESTION

**HOW MUCH DO YOU THINK THAT THE US SHOULD TRUST CHINA – A GREAT DEAL, SOME, A LITTLE OR NONE AT ALL?**

## US

Less than half of the public (48%), business leaders (47%) and opinion leaders (46%) think the US should trust China a great deal or some.

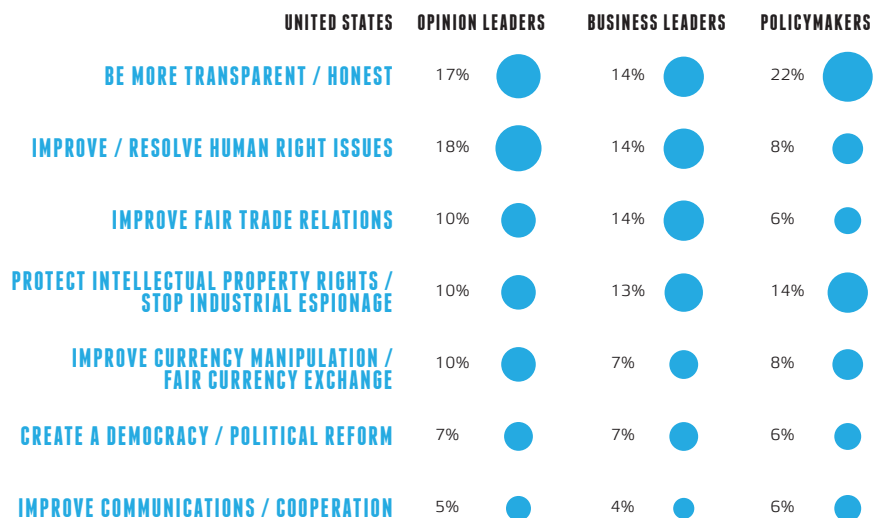
Majorities of opinion leaders (56%), business leaders (53%) and the public (51%) believe the US should trust China a little or none at all.

## CHINA

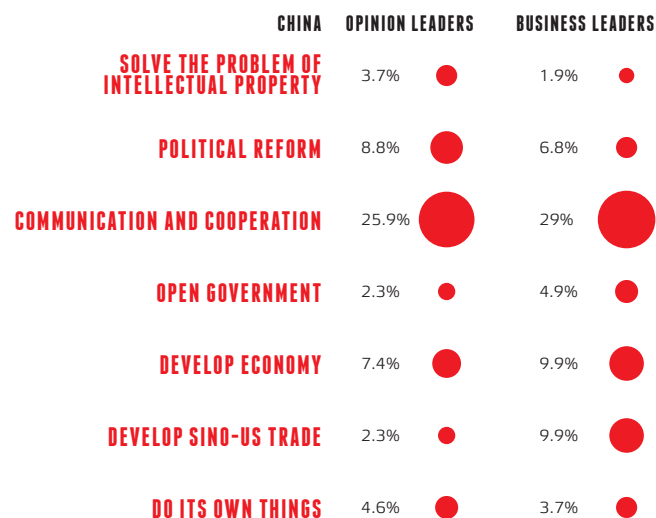
Among elites, opinion leaders (45.8%) and business leaders (43.3%) think the US is trustworthy.

A majority of the Chinese public (56.1%), business leaders (53.7%) and opinion leaders (51.8%) think the United States is not trustworthy.

# TRUSTING CHINA



Only top seven items listed.  
See appendix for full list.



Only top seven items listed.  
See appendix for full list.

## BASE QUESTION

### WHAT SHOULD CHINA DO TO IMPROVE TRUST BETWEEN THE COUNTRIES?

## US

Business leaders are divided, with virtually identical proportions recommending that China be more transparent and honest (14%), improve or resolve human rights issues (14%), improve fair trade relations (14%), and protect intellectual property rights / stop industrial espionage (13%).

## CHINA

More than one-fourth of business leaders (29%) and opinion leaders (25.9%) think the Chinese government should strengthen communication and cooperation between both countries.

# TRUSTING THE UNITED STATES



Only top five items listed.  
See appendix for full list.



Only top five items listed.  
See appendix for full list.

## BASE QUESTION

US SURVEY:

**WHAT SHOULD THE US DO TO  
IMPROVE TRUST BETWEEN  
THE COUNTRIES?**

CHINA SURVEY:

**WHAT SHOULD CHINA DO TO  
IMPROVE TRUST BETWEEN  
THE COUNTRIES?**

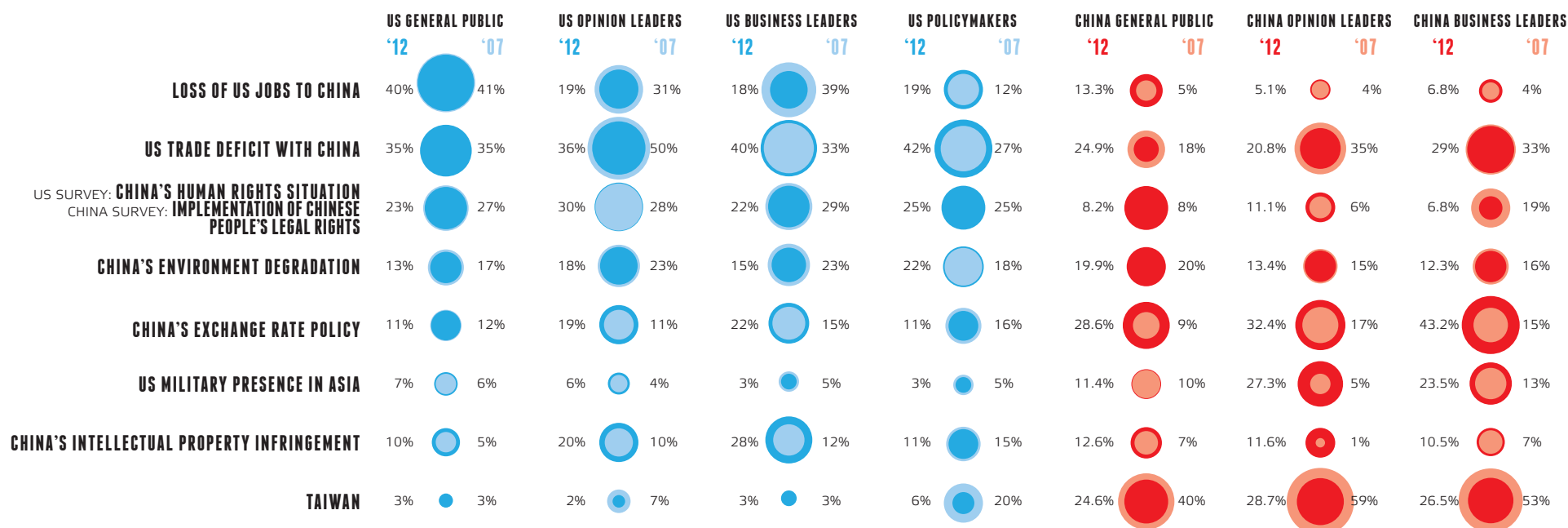
## US

Business leaders (13%) and opinion leaders (12%) think the US could improve communications or open communications.

## CHINA

A quarter of business leaders (23.5%) and opinion leaders (27.8%) identify the need to strengthen exchanges and communication between both countries.

# GREATEST CONCERNS



## BASE QUESTION

### WHAT ARE YOUR TWO GREATEST CONCERNS ABOUT US-CHINA RELATIONS?

*Only top eight items listed.  
See appendix for full list.*

*Percentages total more than  
100% as respondents were asked  
to select the top two responses.*

*2012 Survey contains "China's  
Internet hacking threat"*

## US

The public's top two concerns are the loss of US jobs to China (40%) and the US trade deficit with China (35%), similar to 2007 data.

Business leaders worry most about the US trade deficit (40%), an increase from 33% in 2007, and their concern about China's intellectual property infringement (28%) rose from 12%.

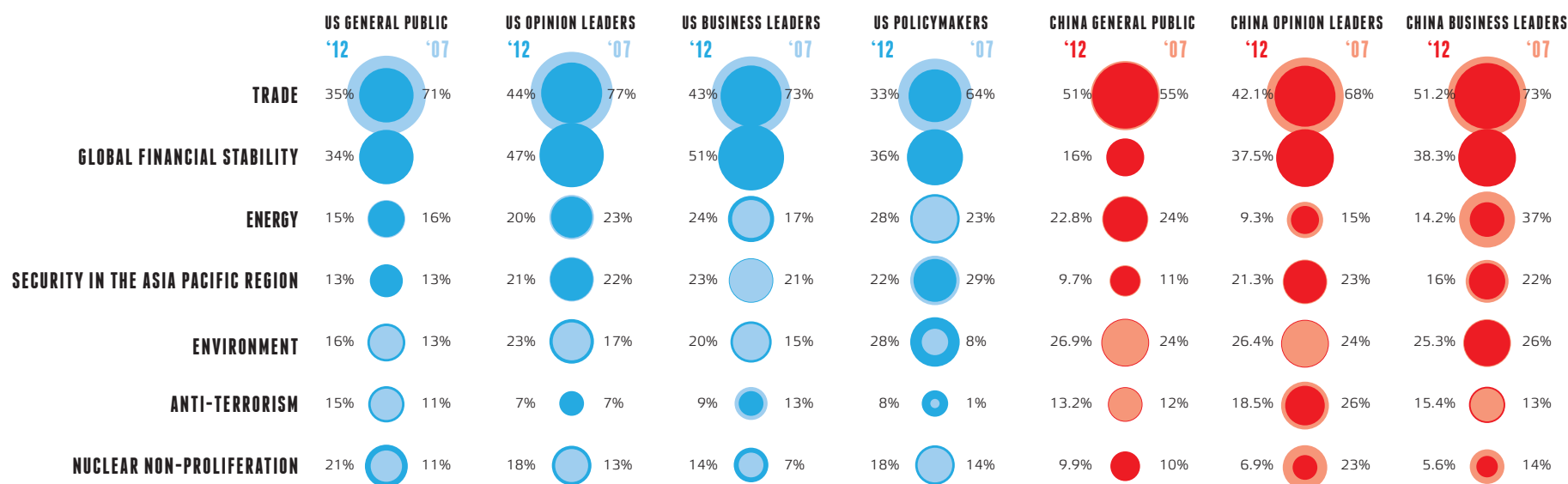
## CHINA

The US-China dispute over the Chinese currency exchange rate is the topmost concern of the Chinese public (28.6%), business leaders (43.2%) and opinion leaders (32.4%).

The US-China trade deficit, Taiwan and US military presence in the Asia Pacific also rank among the greatest concerns for all groups.



# COMMON INTERESTS



## BASE QUESTION

### IN WHAT TWO AREAS DO YOU THINK THE US AND CHINA SHARE THE MOST COMMON INTEREST?

Only top seven items listed.  
See appendix for full list.

Percentages total more than 100% as respondents were asked to select the top two responses.

## US

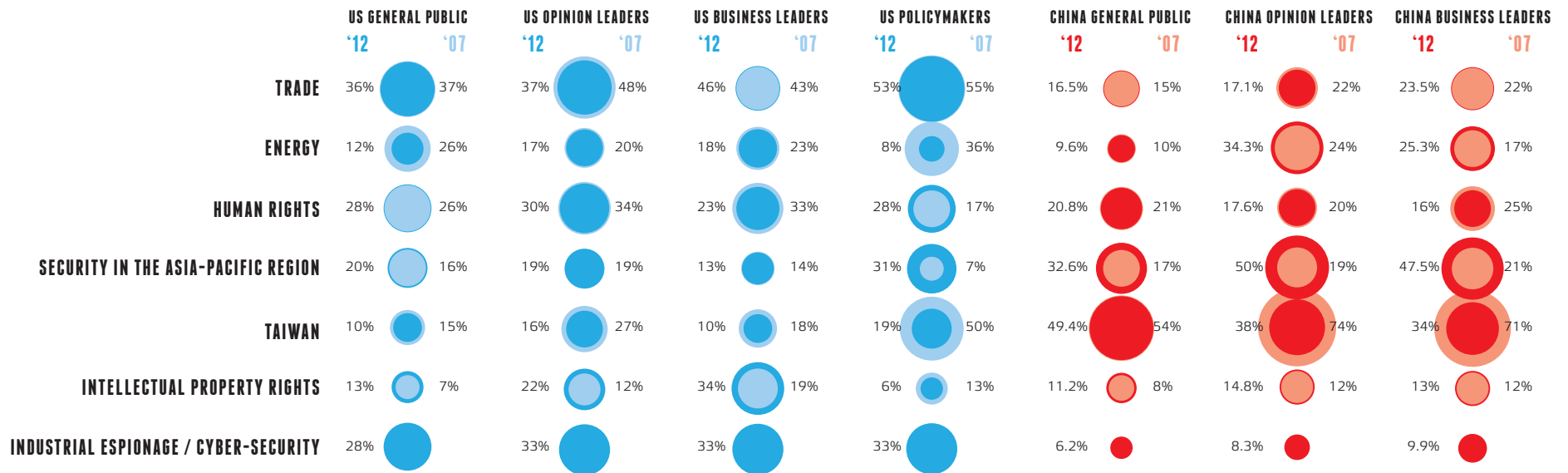
All respondent groups cite trade and global financial stability as the top two areas of common interest.

Belief that nuclear non-proliferation is a potential area of common interest increased across all respondent groups, and almost doubled among the American public (11% to 21%) since 2007.

## CHINA

Trade ranks as the highest common interest among all groups. Besides trade, the public cites energy (22.8%) and the environment (26.9%) as two main areas of common interest, while opinion and business leaders indicate global financial stability, the environment and security in the Asia Pacific region.

# POTENTIAL CONFLICTS



## BASE QUESTION

### WHAT ARE THE TWO MOST LIKELY SOURCES OF CONFLICT BETWEEN THE US AND CHINA IN THE NEAR FUTURE?

*Only top seven items listed.  
See appendix for full list.*

*Percentages total more than  
100% as respondents were asked  
to select the top two responses.*

## US

Trade is the most likely source of conflict for a majority of all respondent groups.

Business leaders (34%) rank intellectual property rights as the second highest likely source of conflict, a notable increase from one-fifth (19%) in 2007; one-third of opinion leaders and policymakers (33%) identify industrial espionage/cyber-security as the second most likely sources of conflict.

## CHINA

The Chinese public (49.4%) considers Taiwan a potential conflict point.

Security in the Asia Pacific ranks as a top concern for business (47.5%) and opinion leaders (50.0%).

3

**US-CHINA POLICY**

# HIGHLIGHTS

## AMERICAN POLICY TOWARD CHINA

The American public believes the US accepts China's status as a rising power and wants a collaborative relationship by a widening 3 to 1 margin in contrast to 2 to 1 in 2007. American elites concur by an even wider margin. The Chinese public by a 2 to 1 margin believes the US is trying to prevent China from becoming a great power. Chinese elites, divided on this issue, are leaning more toward Chinese public perceptions.

## US-CHINA RELATIONS TRENDS

Almost half of the American public and elites believe there is no change in US-China relations. The remaining half is divided almost evenly between improved and worse relations. Half of the Chinese public is unsure or believes there is no change, with the other half also evenly split between improving and getting worse. Although more Chinese elites tend to believe relations are improving, the proportion of Chinese elites who perceive worsening US-China relations rose from 3% to 22%, compared to 2007.

## WHO TO BLAME FOR WORSENING RELATIONS

Half of the American public who see worsening relations blames the US government. Half of the American elites fault the Chinese government. Two out of three Chinese public attribute worsening relations to the US government. Half of Chinese business leaders blame the US government, while half of Chinese opinion leaders blame both governments.

## RATING GOVERNMENT PERFORMANCE

American public (35%) and elites (37%-42%) rate the US government's handling of bilateral relations as excellent or good, up from a range of 18% to 34% in 2007. The Chinese public's rating of the US government remains at 27.9% in 2012 and 28% in 2007, while the Chinese opinion leaders' rating fell from 32% in 2007 to 26.4% in 2012, and business leaders' rating fell from 48% to 25.3%, respectively. A quarter of

American public and elites rate the Chinese government's handling of bilateral relations as excellent or good, unchanged from 2007.

## US PRESENCE IN THE ASIA PACIFIC

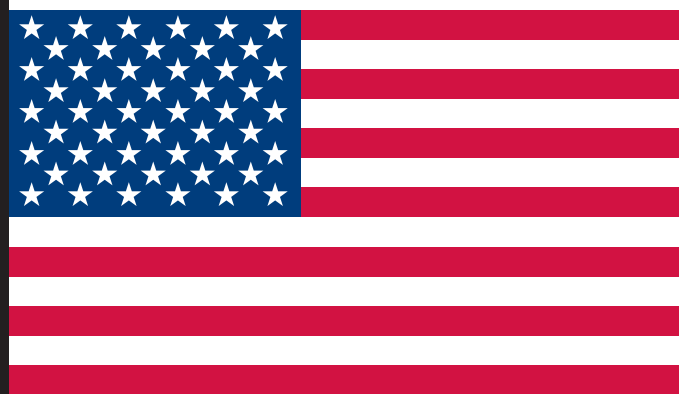
A majority of American public and elites believe US political involvement and military presence in the Asia Pacific will contribute to regional security and create tension among stakeholders. A majority of the Chinese public and elites believe US presence in the region will only create tension among stakeholders. The margin of support is wider from American elites, while the Chinese elites treat the issue as the top potential conflict point in bilateral relations.

## TAIWAN

China-Taiwan relations are a strategic issue in US-China relations, according to all 2012 US respondent groups. The Chinese public and elites think the Taiwan issue is evolving toward peaceful resolution. A majority of Chinese public and elites believe expanding Cross-Strait exchanges could lead to unification.

## ENVIRONMENT

Roughly half of US respondents worry about global warming, slightly lower than 2007 data. Virtually all US public and elites give the Chinese government low marks on environmental issues. About one-third of US respondents rate the US government's handling of environmental issues as good or excellent, similar to 2007 ratings. A majority of Chinese elites and over 60% of the Chinese public worry about global warming, all at lower levels than 2007 responses. Chinese business (70.4%) and opinion (83.4%) leaders negatively rate the Chinese government's handling of environmental issues, whereas the Chinese public's rating is divided between positive (47.1%) and negative (43.2%).



**THE US ACCEPTS  
CHINA'S STATUS  
AS A RISING  
POWER  
AND WANTS A COLLABORATIVE  
RELATIONSHIP**

by a widening 3 to 1 margin in contrast to a 2 to 1 in 2007. American elites concur with a wider margin.



**THE US IS TRYING  
TO PREVENT  
CHINA  
FROM BECOMING A  
GREAT POWER**

by a 2 to 1 margin. Chinese elites, divided on this issue, are leaning more toward Chinese public perceptions.

p 48

**THE GENERAL PUBLIC  
IN THE US AND CHINA  
BELIEVE THERE IS  
NO CHANGE IN US-CHINA  
RELATIONS FROM  
2007 TO 2012.**

**HOWEVER, THE PROPORTION  
OF CHINESE ELITES WHO  
PRECEIVE WORSENING  
US-CHINA RELATIONS  
ROSE FROM 3% TO 22%.**

p 49

**ALL 2012 US RESPONDENT GROUPS**

**AGREE  
CHINA-TAIWAN RELATIONS  
ARE A STRATEGIC ISSUE IN  
US-CHINA  
RELATIONS.**

p 57

## WHO TO BLAME FOR WORSENING RELATIONS p 50

**50%**

GENERAL PUBLIC  
BLAME US GOV'T

**50%**

OPINION LEADERS  
BLAME CHINESE GOV'T

**52%**

BUSINESS LEADERS  
BLAME CHINESE GOV'T

**66%**

GENERAL PUBLIC  
BLAME US GOV'T

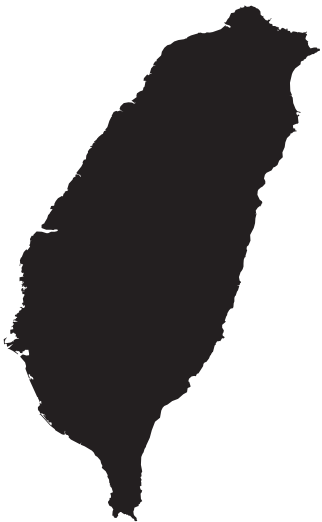
**56%**

OPINION LEADERS  
BLAME BOTH GOV'TS

**51%**

BUSINESS LEADERS  
BLAME US GOV'T

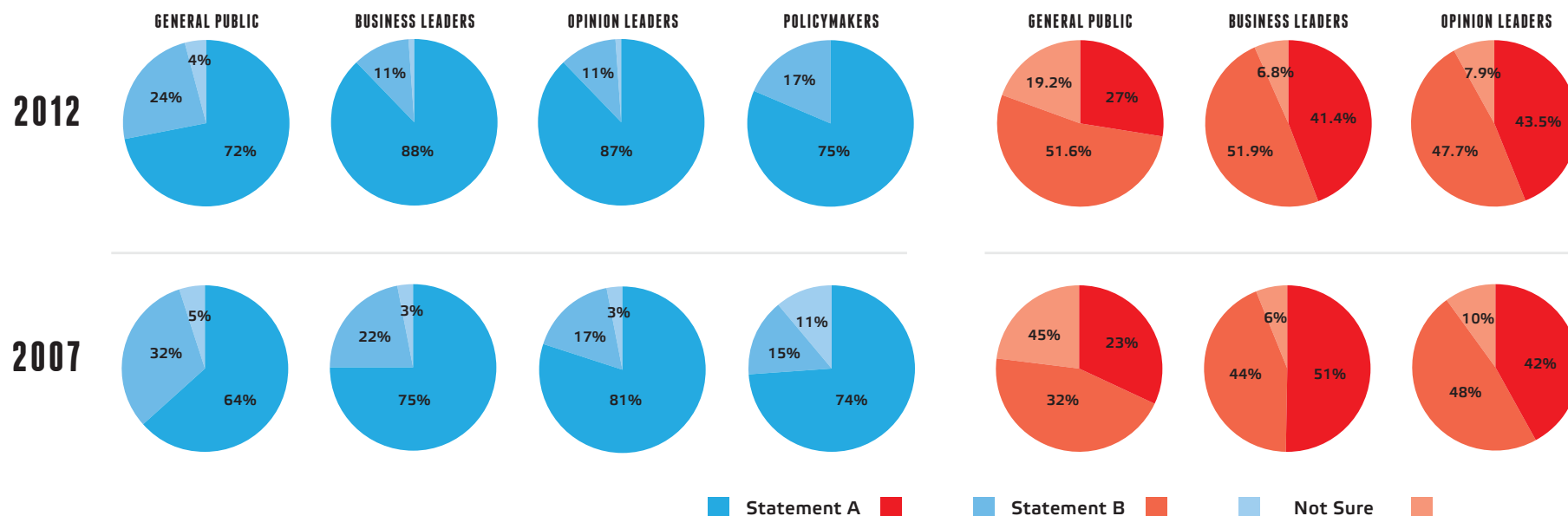
BOTH THE **US** AND **CHINA** AGREE THAT  
US PRESENCE + ASIA PACIFIC REGION = **TENSION** p 60



## CURRENT CROSS-STRAIT RELATIONS p 58

THE MAJORITY OF THE **CHINESE** THINK THE  
TAIWAN ISSUE IS EVOLVING TOWARD  
**PEACEFUL RESOLUTION**

# AMERICAN POLICY TOWARD CHINA



## BASE QUESTION

**I WILL NOW READ TWO STATEMENTS. PLEASE TELL ME WHICH COMES CLOSEST TO YOUR VIEW.**

**STATEMENT A: THE US ACCEPTS CHINA'S STATUS AS A RISING POWER AND WANTS A COLLABORATIVE RELATIONSHIP.**

**STATEMENT B: THE US IS TRYING TO PREVENT CHINA FROM BECOMING A GREAT POWER.**

## US

Business leaders (88%), opinion leaders (87%) and the public (72%) believe the US accepts China's status as a rising power and wants a collaborative relationship, rather than trying to prevent China from becoming a great power.

All three groups' perceptions reflect an increase since 2007: business leaders (+13 pts), opinion leaders (+6 pts) and general public (+8 pts).

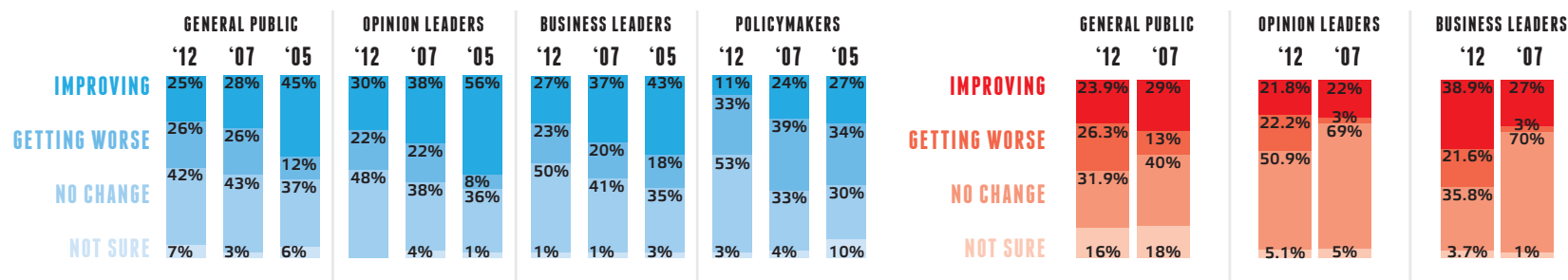
## CHINA

About half of all three respondent groups perceive the US as attempting to prevent China from becoming a great power.

The Chinese public (27%), opinion leaders (43.5%) and business leaders (41.4%) think America accepts China's status and wants to collaborate.



# CURRENT TRENDS IN US-CHINA RELATIONS



## BASE QUESTION

**DO YOU BELIEVE THAT THE RELATIONSHIP BETWEEN THE US AND CHINA IS CURRENTLY IMPROVING, GETTING WORSE, OR IS THERE NO CHANGE?**

## US

Among business and opinion leaders, the percentage of those who report no change is increasing, while those who say it is improving has declined since 2007.

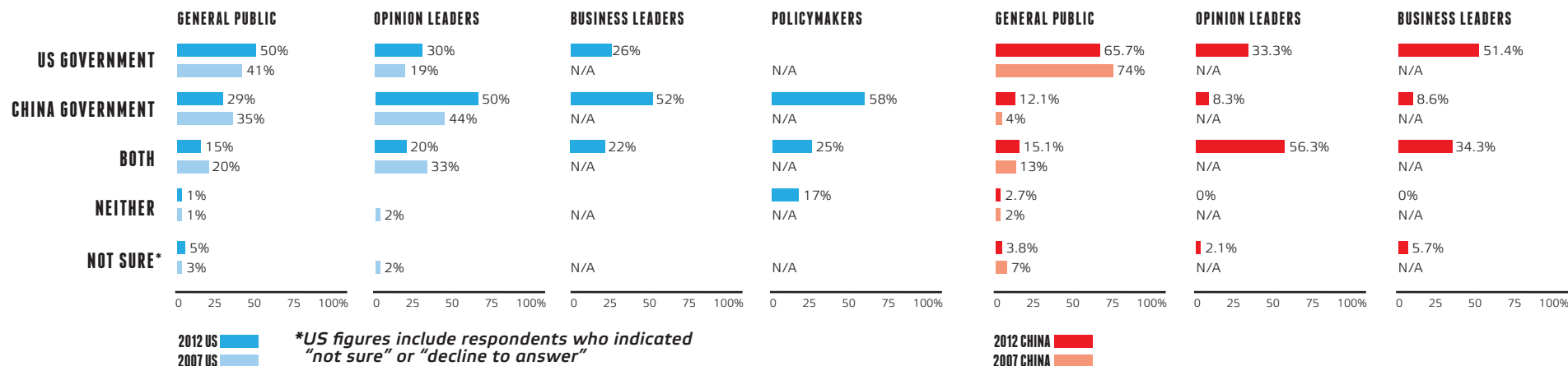
The public is divided about whether the US-China relationship is improving or declining.

## CHINA

About half of opinion leaders (50.9%) and one-third of the public believe there is no change; more business leaders believe the relationship is improving (38.9%) than not changing (35.8%).

Compared with 2007, more business leaders are optimistic about US-China relations.

# RESPONSIBILITY FOR WORSENING OF RELATIONS



## BASE QUESTION

**WHO DO YOU THINK IS MOST RESPONSIBLE FOR THE DETERIORATION IN US-CHINA RELATIONS – US GOVERNMENT OR CHINESE GOVERNMENT?**

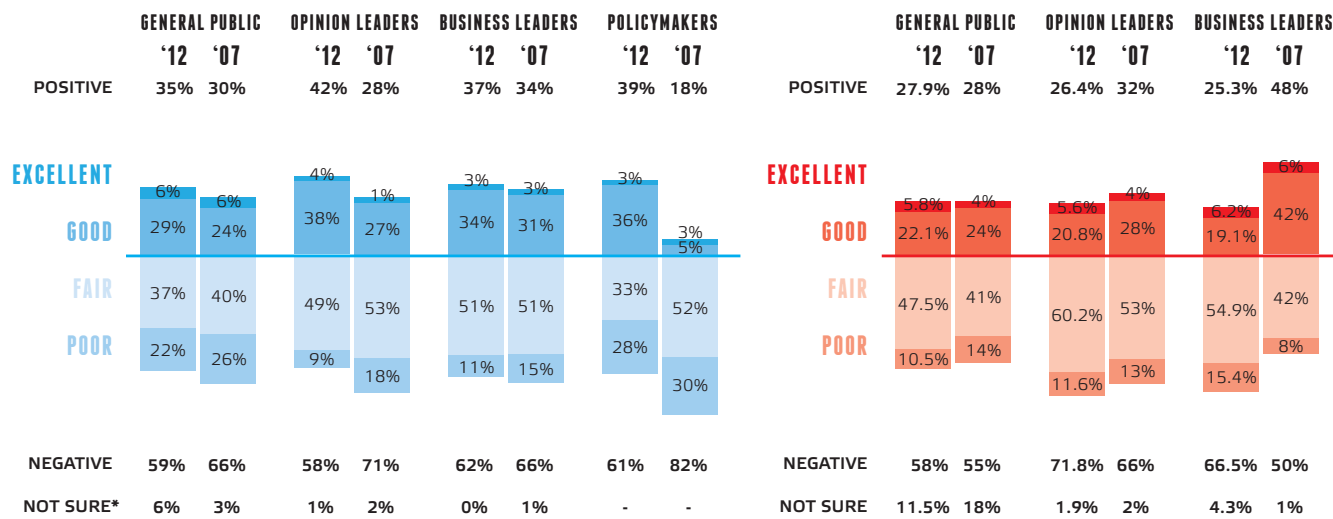
## US

Half of the American public who see worsening relations blame the US government. Half of American elites fault the Chinese government.

## CHINA

Two out of three Chinese public attribute worsening relations to the US government. Half of Chinese business leaders blame the US government, while half of Chinese opinion leaders blame both governments.

# US GOVERNMENT HANDLING OF BILATERAL RELATIONS



*\*US figures include respondents who indicated "not sure" or "decline to answer"*

## BASE QUESTION

### HOW WOULD YOU RATE THE US GOVERNMENT'S HANDLING OF ITS RELATIONS WITH CHINA?

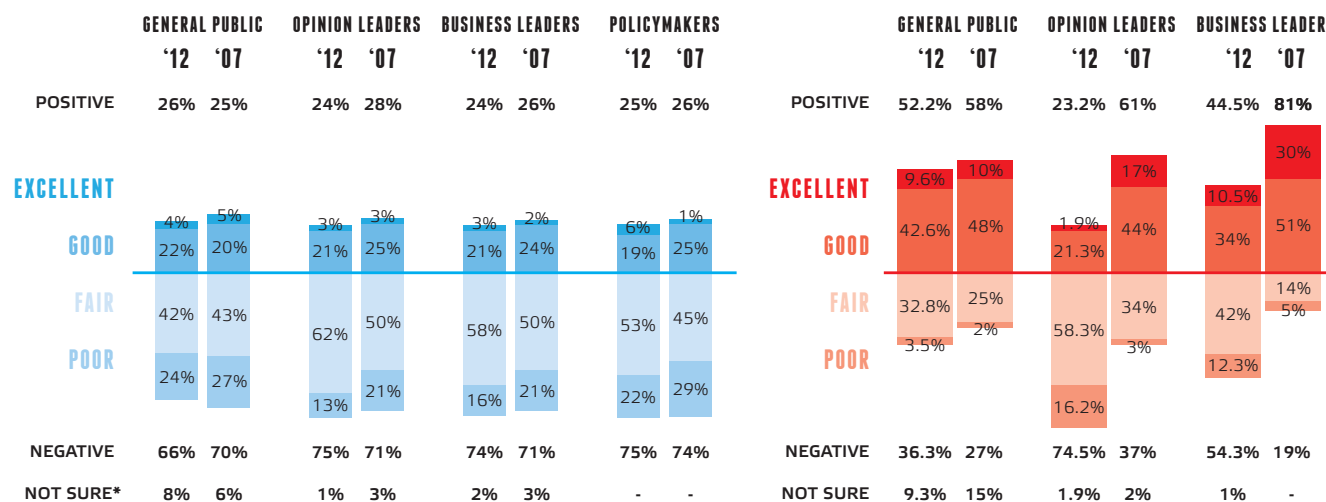
## US

Majorities of all groups assign fair or poor ratings to the US government's handling of relations with China; these same ratings have declined since 2007, dropping between 4 and 21 percentage points across all groups.

## CHINA

Opinion (60.2%) and business leaders (54.9%) rate the US government's handling of relations with China as fair.

# CHINA GOVERNMENT HANDLING OF BILATERAL RELATIONS



\*US figures include respondents who indicated "not sure" or "decline to answer"

## BASE QUESTION

### HOW WOULD YOU RATE THE CHINESE GOVERNMENT'S HANDLING OF ITS RELATIONS WITH THE US?

## US

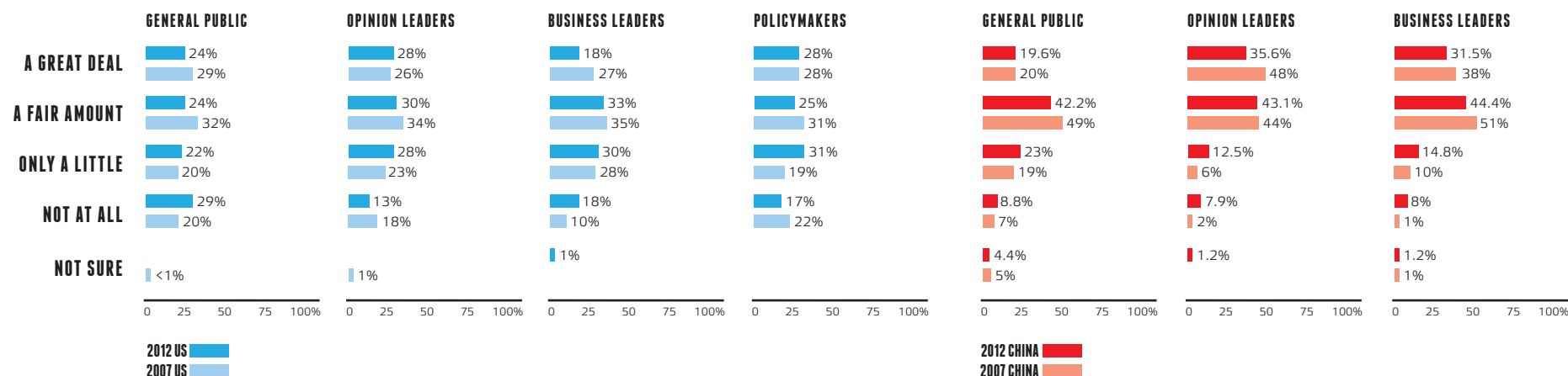
Only about one-in-four in each group assign an excellent or good rating to the Chinese government's handling of relations with the US.

Since 2007, there has been a notable decline in poor ratings and an increase in fair ratings among business leaders (+8%) and opinion leaders (+12%).

## CHINA

A majority of the public (52.2%) and 44.5% of business leaders give the Chinese government's handling of bilateral relations positive ratings. However, less than one-quarter of opinion leaders (23.2%) hold a positive view and a majority (58.3%) only assigns a fair rating.

# ENVIRONMENT: GLOBAL WARMING



## BASE QUESTION

**HOW MUCH DO YOU PERSONALLY WORRY ABOUT GLOBAL WARMING—A GREAT DEAL, A FAIR AMOUNT, ONLY A LITTLE, OR NOT AT ALL?**

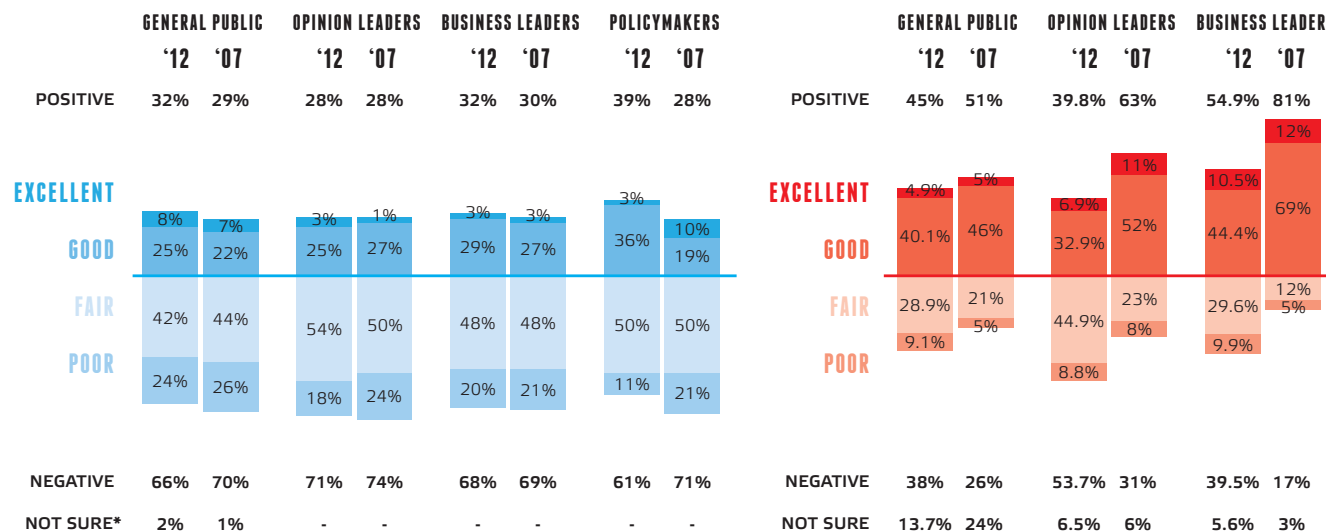
## US

Approximately half of the US public (48%) and business leaders (51%) and 59% of opinion leaders personally worry about global warming a great deal or fair amount, down slightly from 2007.

## CHINA

A large majority of business leaders (75.9%) and opinion leaders (78.7%) worry about global warming. The general public (61.8%), however, appears less worried. Compared with 2007, all respondent groups' concerns about global warming have decreased.

# ENVIRONMENT: US GOVERNMENT PERFORMANCE



\*US figures include respondents who indicated "not sure" or "decline to answer"

## BASE QUESTION

### HOW WOULD YOU RATE THE US GOVERNMENT'S PERFORMANCE IN HANDLING ENVIRONMENTAL ISSUES?

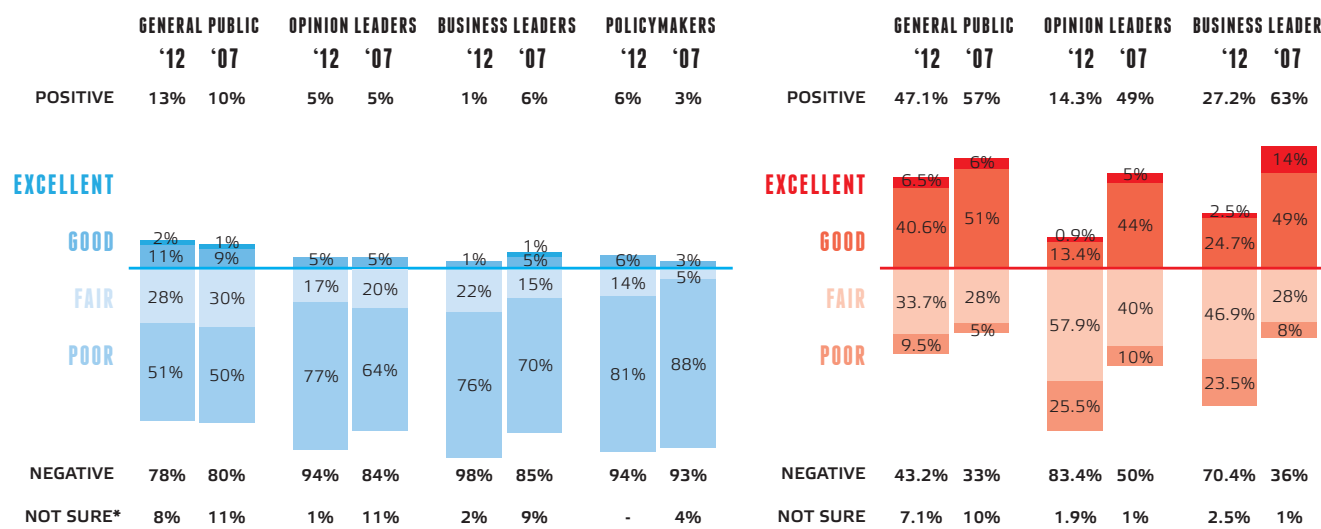
## US

Roughly two-thirds of all groups rate the US government's handling of environmental issues as fair or poor, similar to 2007 ratings.

## CHINA

A majority of business leaders (54.9%) rate the US government's performance in addressing environmental problems positively, while over half of opinion leaders (53.7%) rate the government's performance negatively.

# ENVIRONMENT: CHINA'S GOVERNMENT PERFORMANCE



\*US figures include respondents who indicated "not sure" or "decline to answer"

## BASE QUESTION

### HOW WOULD YOU RATE THE CHINESE GOVERNMENT'S PERFORMANCE IN HANDLING ENVIRONMENTAL ISSUES?

## US

Almost all business (98%) and opinion leaders (94%) rate the Chinese government's performance in handling environmental issues as fair or poor, an increase from 2007.

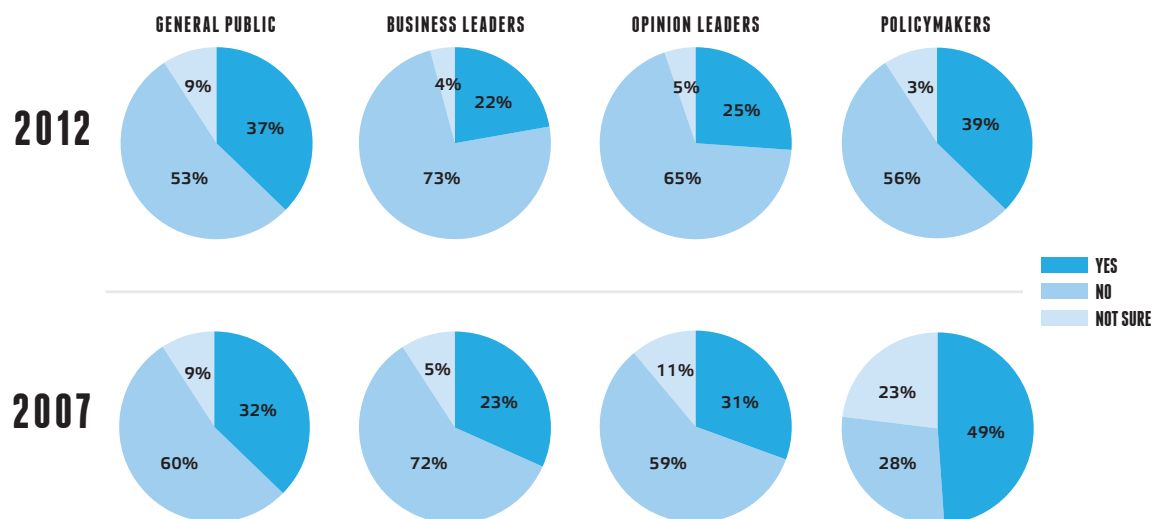
The public's positive ratings increased slightly over 2007, while ratings from business leaders dropped and those from opinion leaders remained steady.

## CHINA

Chinese elites – business leaders (70.4%) and opinion leaders (83.4%) – give the Chinese government negative ratings on its handling of environmental issues.

The Chinese public (47.1%) rates the Chinese government positively in addressing environmental issues, though 43.2% of the public give negative ratings.

# US INTERVENTION IN TAIWAN



## 2012 BASE QUESTION

**IF A DECLARATION OF INDEPENDENCE BY TAIWAN LEADS TO MILITARY HOSTILITIES WITH CHINA, DO YOU THINK THE AMERICAN PUBLIC SHOULD SUPPORT US MILITARY INTERVENTION?**

## 2007 BASE QUESTION

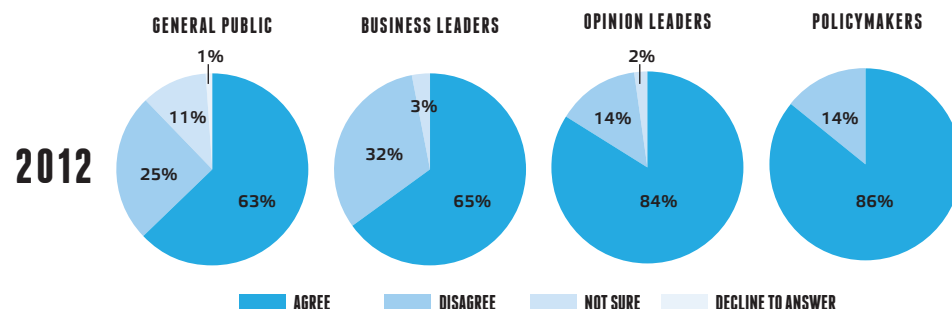
**IF A DECLARATION OF INDEPENDENCE BY TAIWAN LEADS TO MILITARY HOSTILITIES, SHOULD THE US INTERVENE ON BEHALF OF TAIWAN?**

## US

All 2012 respondent groups do not think the American public should support US military intervention if Taiwan declared independence.



# US INVOLVEMENT IN CHINA-TAIWAN RELATIONS

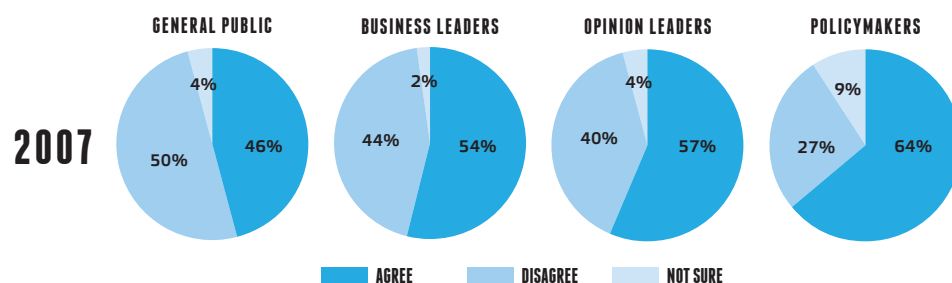


BASE QUESTION

**PLEASE TELL ME WHETHER YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT:**

**CHINA-TAIWAN RELATIONS ARE A STRATEGIC ISSUE IN US-CHINA RELATIONS.**

*The 2012 question was modified from the 2007 question below.*



BASE QUESTION

**PLEASE TELL ME WHETHER YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT:**

**THE US SHOULD TAKE AN ACTIVE ROLE IN CHINA-TAIWAN RELATIONS.**

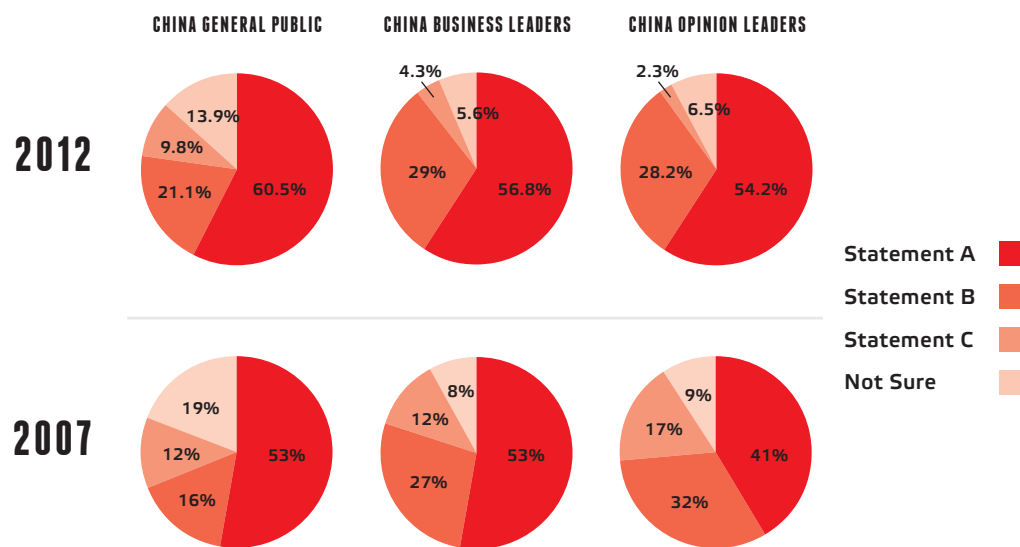
## US

In 2012, a strong majority of all respondent groups agree China-Taiwan relations are a strategic issue in US-China relations.

## US

In 2007, US public and elites agreed the US should take an active role in China-Taiwan relations.

# CURRENT CROSS-STRAIT RELATIONS



## BASE QUESTION

WHICH OF THE FOLLOWING DO YOU THINK IS THE MOST ACCURATE DESCRIPTION OF THE CURRENT CROSS-STRAIT SITUATION?

**STATEMENT A: TAIWAN ISSUE IS EVOLVING TOWARD PEACEFUL SETTLEMENT\***

**STATEMENT B: TAIWAN ISSUE HAS BECOME A STALEMATE\*\***

**STATEMENT C: TAIWAN ISSUE IS EVOLVING TOWARD MILITARY CONFLICT**

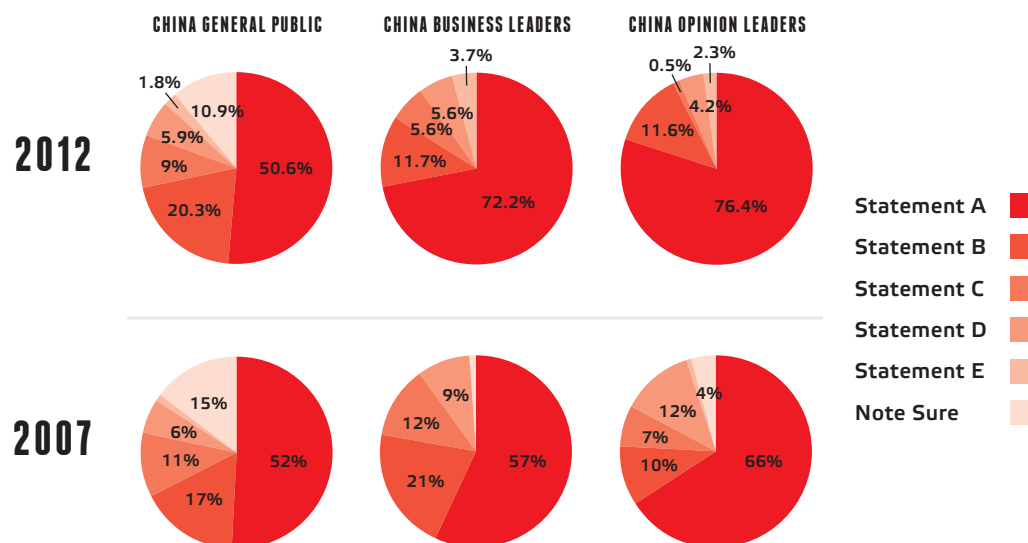
*\*The term "resolution" was used in the 2007 survey; "settlement" was used in the 2012 survey.*

*\*\* The term "deadlock" was used in the 2007 survey.*

## CHINA

The Chinese public (60.5%), opinion leaders (54.2%) and business leaders (56.8%) believe the Taiwan issue is evolving toward peaceful settlement. A greater percentage of the public thinks Cross-Strait relations are easing.

# SOLUTION TO THE TAIWAN ISSUE



## BASE QUESTION

**AMONG THE FOLLOWING MEASURES THAT CHINA CAN TAKE TO RESOLVE THE TAIWAN PROBLEM, WHICH ONE DO YOU THINK WILL BE MOST APPROPRIATE?**

**STATEMENT A: EVENTUALLY ACHIEVING UNIFICATION BY EXPANDING CROSS-STRAIT EXCHANGES**

**STATEMENT B: FORCING TAIWAN TO RETURN TO CHINA BY EXERTING ECONOMIC PRESSURE**

**STATEMENT C: ACHIEVING UNIFICATION BY FORCE**

**STATEMENT D: OBSERVING MEASURES TAKEN BY TAIWANESE AUTHORITIES**

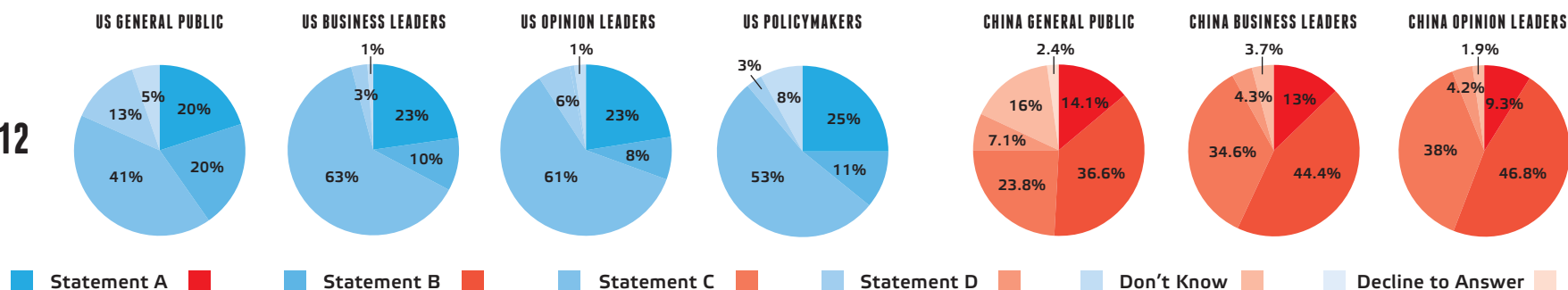
**STATEMENT E: DO NOTHING**

## CHINA

All three groups think that expanding Cross-Strait exchanges is the most appropriate step China should take to unite with Taiwan, with particularly strong agreement from business leaders (72.2%) and opinion leaders (76.4%).

# US MILITARY PRESENCE IN THE ASIA PACIFIC

2012



## BASE QUESTION

**HOW WILL US POLITICAL INVOLVEMENT AND MILITARY PRESENCE IN THE ASIA PACIFIC REGION CONTRIBUTE TO THE SECURITY OF THE REGION?**

**STATEMENT A: MAINTAIN SECURITY IN THE REGION**

**STATEMENT B: CREATE TENSION AMONG STAKEHOLDERS**

**STATEMENT C: BOTH MAINTAIN SECURITY IN THE REGION AND CREATE TENSION AMONG STAKEHOLDERS**

**STATEMENT D: HAVE NO IMPACT**

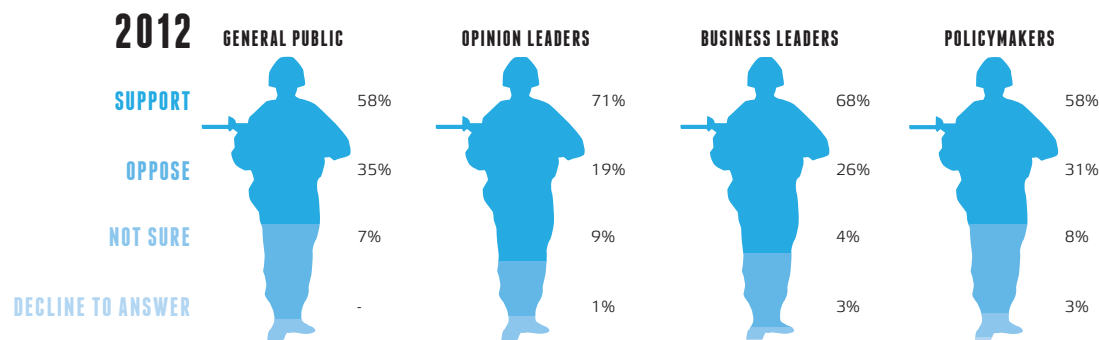
## US

A majority of elites believe US political involvement and military presence in the Asia Pacific will both maintain security and create tension among stakeholders, while less than half (41%) of the public agrees.

## CHINA

Roughly 40% of all respondent groups think US presence in the region will only create tension among stakeholders.

# SUPPORT FOR US MILITARY PRESENCE IN THE ASIA PACIFIC



## BASE QUESTION

**RECENTLY, THE US ANNOUNCED AN INCREASED MILITARY PRESENCE IN THE ASIA PACIFIC REGION BY STATIONING MARINES IN AUSTRALIA. DO YOU SUPPORT OR OPPOSE THIS ACTION BY THE US?**

## US

Roughly seven-in-ten opinion (71%) and business leaders (68%) support the US military presence of Marines stationed in Australia. Similarly, almost six-in-ten members of the US public (58%) support it.

4

**TRADE AND  
INVESTMENT**

# HIGHLIGHTS

---

## TRADE BENEFITS AND ISSUES

An overwhelming majority of American and Chinese public and elites believe trade is beneficial to the US and China with similar consensus that Chinese products benefit American consumers. Tainted food and unsafe toy cases, however, have reduced confidence in products from China. Strong disagreement between the US and China exists on whether China causes job losses in the US. Among the American public who believe China causes job losses in the US, 4 out of 5 believe the US should not outsource manufacturing jobs to China, even if eliminating outsourcing results in higher prices for US consumers. US elites, however, are divided on this issue. Over 80% of US business leaders indicate some or great concerns about China's intellectual property rights protection if their company is considering doing business with China.

## TRADE DEFICITS

Seventy percent of the American public thinks the US government is responsible for the country's large trade deficit with China, increasing from 65% in 2007. About half of US elites and the Chinese public also attribute responsibility for the deficit to the US government.

## BUSINESS PRACTICES IN CHINA

US business leaders cite three top concerns in Chinese business practices: poor intellectual property rights protection, corruption and an inadequate legal system. Chinese business leaders indicate corruption, inadequate legal system and bureaucratic interference.

## BUSINESS PRACTICES IN THE US

Chinese business leaders cite US import measures – tariff protections and anti-dumping – as major US business barriers, followed by legal and regulatory differences, US bureaucratic interference, cultural differences, complex trade approval procedures, and lack of knowledge about doing business in the US, similar to 2007 responses.

## MIXED BLESSINGS IN INVESTMENTS

US elites overwhelmingly agree US-China bilateral investment will stimulate both economies, result in closer bilateral ties, and create jobs in the US. The US public is supportive but less convinced in each case. Three quarters of US elites agree such investments will result in the Chinese buying more US Treasuries; 59% of the American public agree. The American public (60%) agrees bilateral investments will result in the risk of America losing control over its own economy, but only one third of US elites share this view. Despite mixed benefits and perceived risks, the American public encourages Chinese investment in the US by a 2 to 1 margin; American elite support exceeds 80%.

## SAFETY IN US TREASURY BONDS

About 90% of the American elites believe US Treasury bonds to be a safe investment, but one third of the American public disagrees. About 60% of the Chinese public and elites similarly think US Treasuries are not a safe financial investment.

BOTH **CHINA** AND THE **US** AGREE THAT  
**TRADE**  
IS BENEFICIAL  
TO THE **US** AND **CHINA**  
WITH SIMILAR CONSENSUS  
THAT CHINESE  
PRODUCTS  
BENEFIT AMERICAN CONSUMERS

p 66  
-67

IS THERE RISK OF AMERICA  
LOSING CONTROL OVER ITS  
OWN ECONOMY?

p 74



GENERAL PUBLIC

**59%**  
**AGREE**

OPINION LEADERS

**64%**  
**DISAGREE**

BUSINESS LEADERS

**66%**  
**DISAGREE**

SHOULD THE UNITED STATES ENCOURAGE CHINESE  
INVESTMENT IN THE US?

p 74



GENERAL PUBLIC

**65%**  
**ENCOURAGE**

OPINION LEADERS

**83%**  
**ENCOURAGE**

BUSINESS LEADERS

**81%**  
**ENCOURAGE**

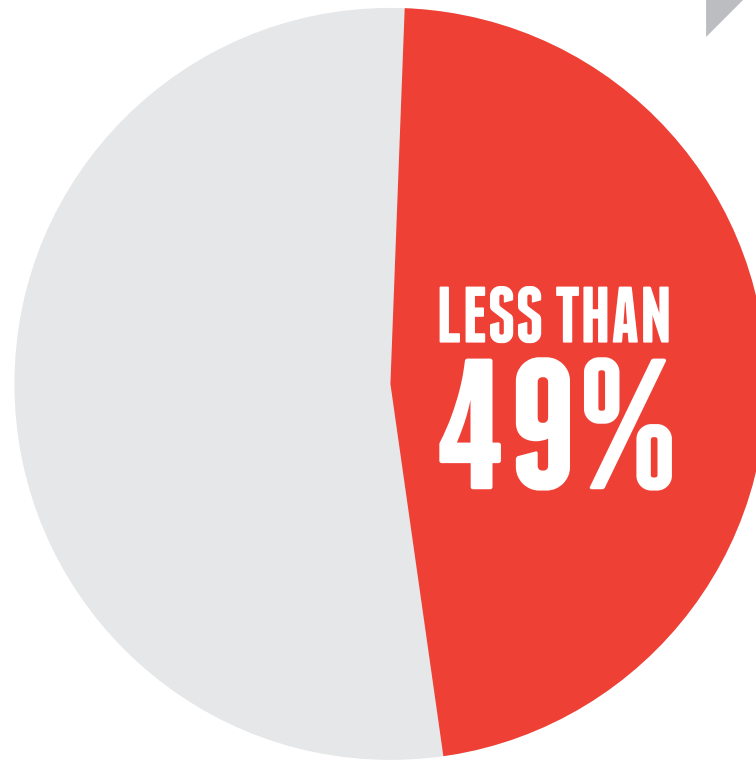


## INTELLECTUAL PROPERTY RIGHTS WHEN CONSIDERING DOING BUSINESS WITH CHINA

p 78

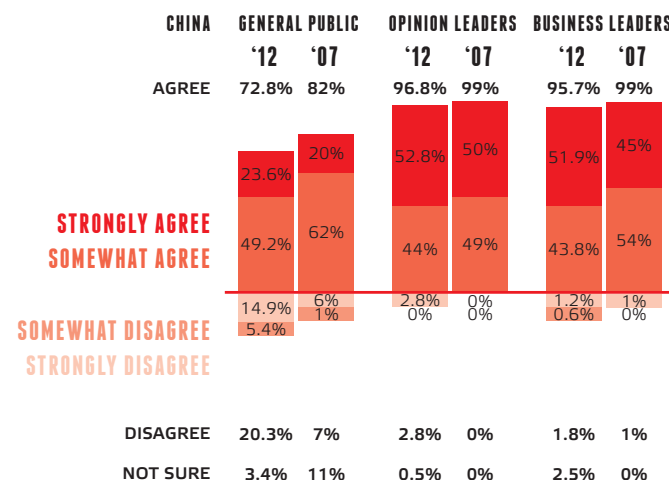
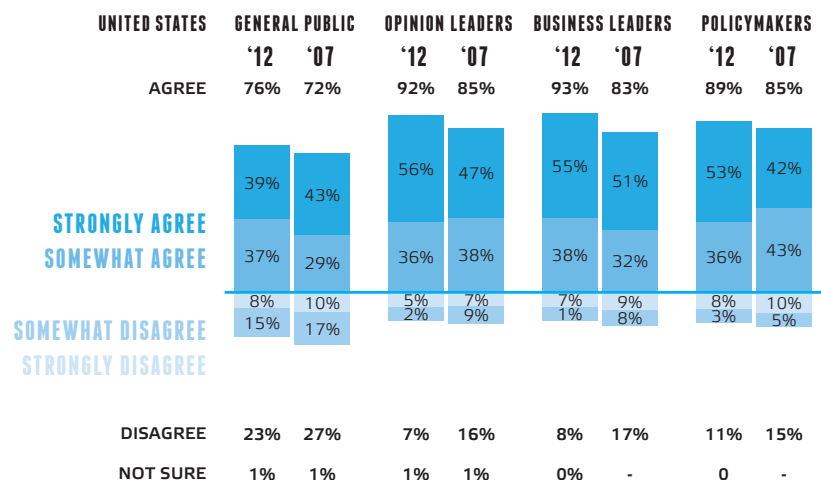


OF US BUSINESS LEADERS  
**SHOW SOME**  
OR GREAT CONCERNS



OF CHINESE BUSINESS LEADERS  
**SHOW SOME**  
OR GREAT CONCERNS

# TRADE BENEFICIAL



## BASE QUESTION

US SURVEY:

**PLEASE TELL ME WHETHER YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: TRADE WITH CHINA IS BENEFICIAL TO THE US ECONOMY.**

CHINA SURVEY:

**PLEASE TELL ME WHETHER YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT: TRADE WITH THE US IS BENEFICIAL TO CHINA'S ECONOMY.**

## US

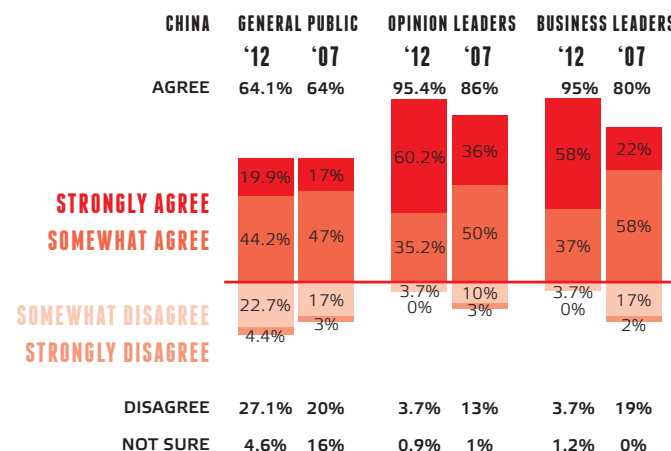
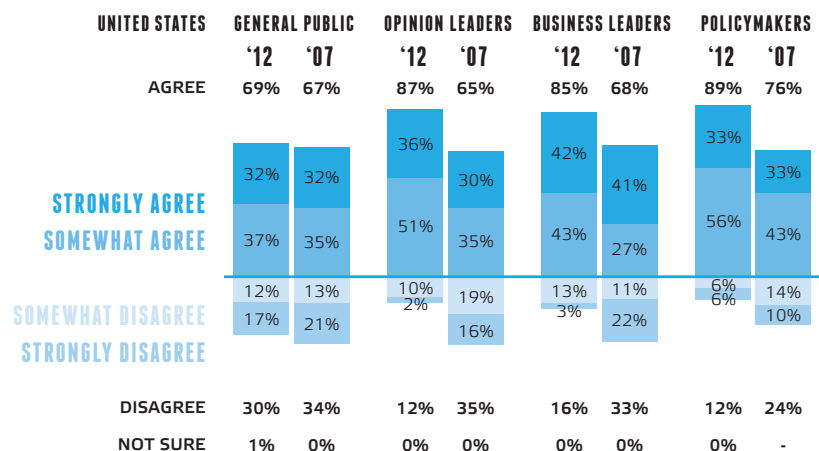
All respondent groups strongly agree trade with China is beneficial to the US economy, increasing from 2007.

The US public indicates slightly lower agreement levels among those that strongly agree (-4 pts) compared to 2007.

## CHINA

Over 90% of business (95.7%) and opinion leaders (96.8%) agree trade with the US will benefit China's economy, while only 72.8% of the Chinese public agrees.

# TRADE BENEFICIAL TO CONSUMER



## BASE QUESTION

**PLEASE TELL ME WHETHER YOU AGREE OR DISAGREE WITH THE FOLLOWING STATEMENT:**

**PRODUCTS FROM CHINA BENEFIT AMERICAN CONSUMERS BECAUSE OF THEIR LOW COST.**

## US

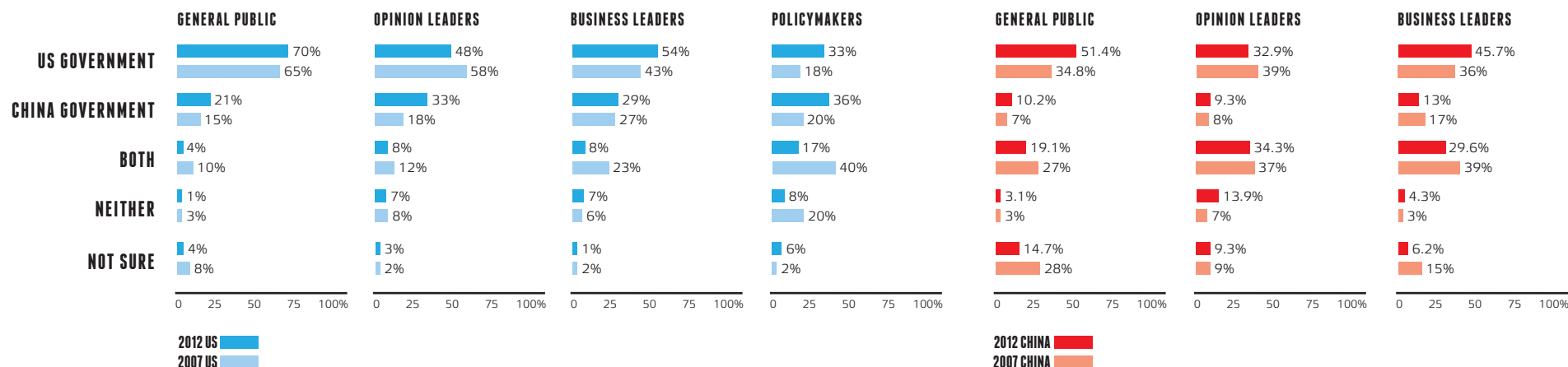
More than four-in-five business leaders (85%) and opinion leaders (87%) strongly or somewhat agree products from China benefit American consumers, up considerably from 2007 data.

Ratings among the US public remain consistent with 2007 levels with approximately two-thirds (69%) reporting they strongly or somewhat agree.

## CHINA

Over 90% of business (95%) and opinion leaders (95.4%) respectively agree “made-in-China” products will benefit US consumers, while only 64.1% of the Chinese public agrees and 27.1% disagree.

# TRADE DEFICIT



## BASE QUESTION

### WHO DO YOU THINK IS MOST RESPONSIBLE FOR THE UNITED STATES' LARGE TRADE DEFICIT WITH CHINA—US GOVERNMENT OR CHINESE GOVERNMENT?

## US

Seven-in-ten US public (70%) feel the US government is responsible for the trade deficit with China, while one-in-five (21%) feel the Chinese government is responsible, both increasing slightly over 2007 levels.

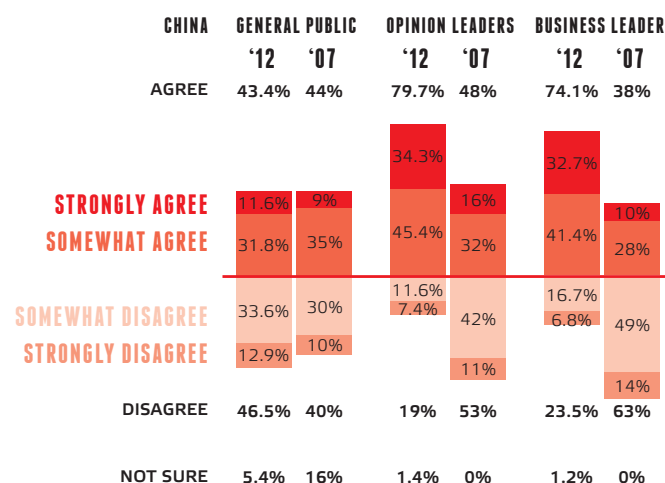
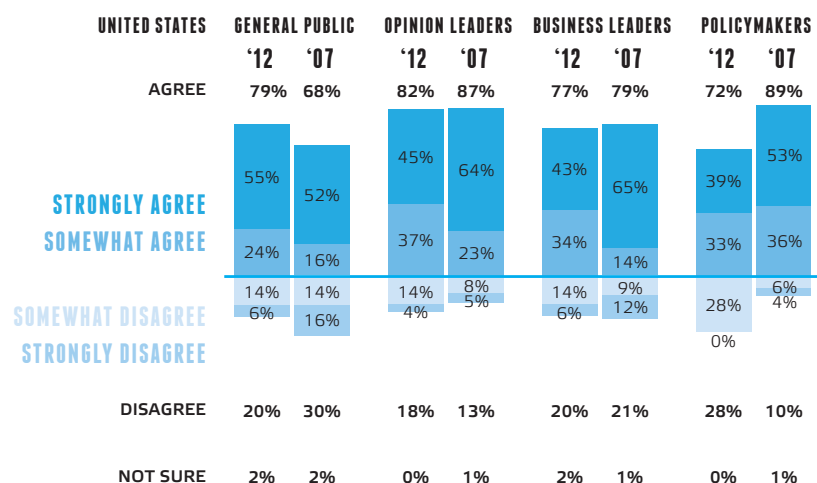
Over half of business leaders (54%) think the US is responsible, rising from 2007; those that think the Chinese government is responsible remains steady at 29%. Among opinion leaders, those that cite the US government decreased 10%, while those that cite the Chinese government rose 15% since 2007.

## CHINA

Both the public (51.4%) and business leaders (45.7%) believe the US is responsible for its trade deficit with China, while 34.3% of opinion leaders think both parties are responsible, slightly higher than the percentage who thinks the US government is responsible (32.9%).

Compared with 2007, the percentage of the public that thinks the US government is responsible has increased significantly (34.8% to 51.4%), while the percentage of those who feel both governments are responsible has decreased from 27% to 19.1%.

# CHINESE PRODUCT SAFETY (MODIFIED)



2012 BASE QUESTION\*

**NOW, 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 THAT CHINESE TAINTED FOOD AND UNSAFE TOY CASES HAVE REDUCED YOUR CONFIDENCE IN PRODUCTS MADE IN CHINA.**

*The 2012 question was modified from the 2007 survey question: "Please tell me whether you agree or disagree with the following statement: "Chinese food contamination cases have reduced your confidence in products made in China."*

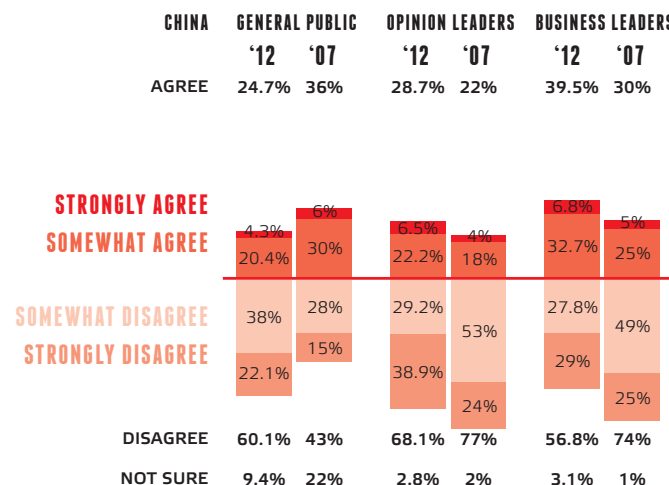
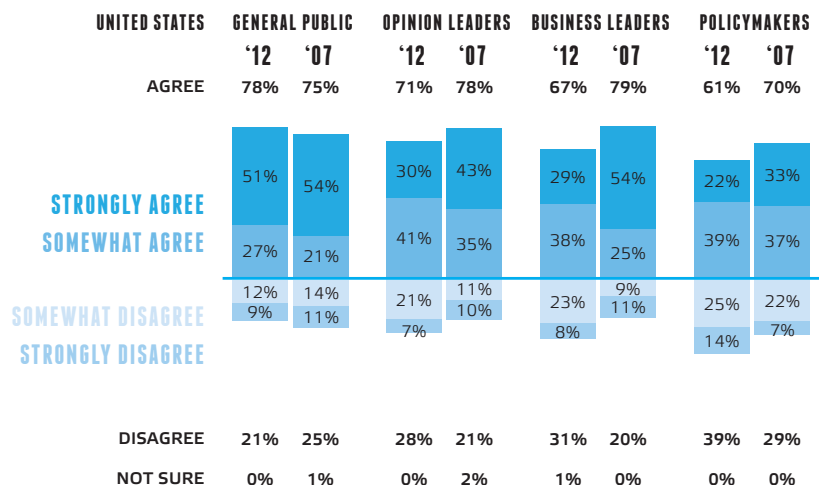
## US

More than half of the US public strongly agrees (55%) Chinese tainted food and unsafe toy cases have reduced their confidence in products made in China, a slight increase over 2007 data.

## CHINA

Elites more than the Chinese public have lost confidence in "made-in-China" products due to product safety issues. About three-quarters of business (74.1%) and opinion leaders (79.7%) cite reduced confidence, while only 43.4% of the Chinese public agrees.

# OUTSOURCING CAUSES JOB LOSS



## BASE QUESTION

**PLEASE TELL ME WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT:**

**CHINA CAUSES JOB LOSSES IN THE US.**

## US

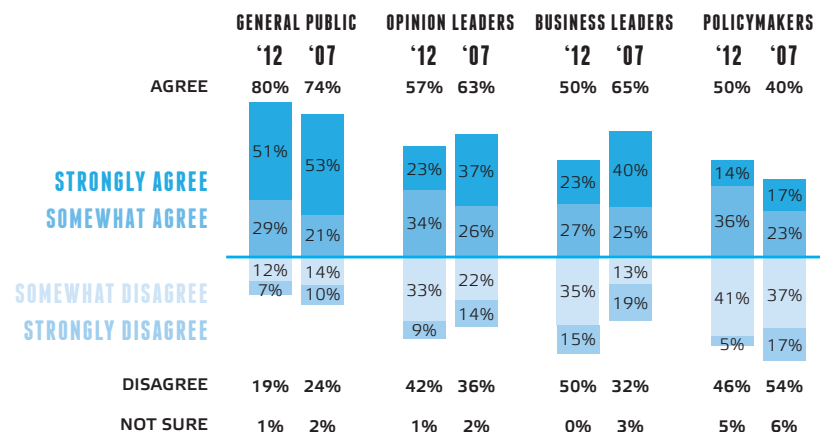
Among business and opinion leaders and policymakers, those who strongly or somewhat agree that China causes job losses in the United States have declined compared to 2007. Business leaders experienced the sharpest decline over 2007 ratings among those who strongly agree (-25 pts).

The US public ratings remain stable compared to 2007, with just over half (51%) reporting strong levels of agreement.

## CHINA

A majority of the three groups disagree that China is causing job losses in the US. Nearly 70% of opinion leaders (68.1%) indicated disagreement, and 38.9% of them express strong disagreement. However, approximately 39.5% of business leaders agree that China causes job losses in the US.

# OUTSOURCING IF COST INCREASES



## BASE QUESTION

ASKED ONLY OF AMERICANS WHO THINK CHINA CAUSES JOB LOSSES:

**PLEASE TELL ME WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT:**

**US SHOULD NOT OUTSOURCE MANUFACTURING JOBS TO CHINA EVEN IF ELIMINATING OUTSOURCING RESULTS IN HIGHER PRICES FOR US CONSUMERS.**

## US

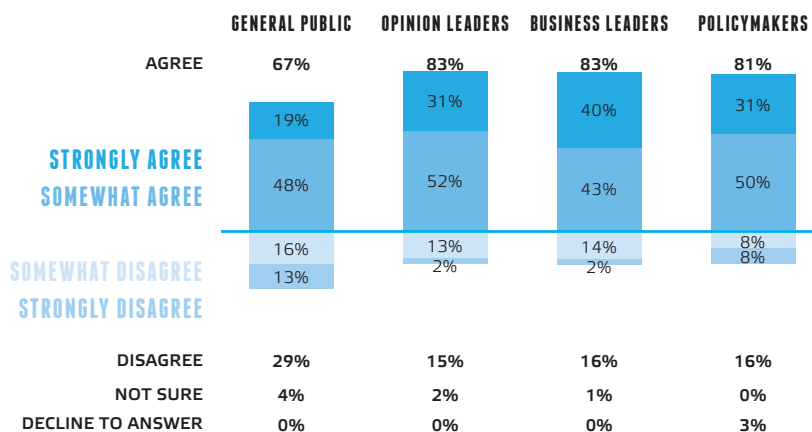
Eight-in-ten (80%) US public respondents strongly or somewhat agree the US should not outsource manufacturing jobs to China even if it results in higher prices for US consumers, a slight increase over 2007 levels.

Roughly half of business leaders (51%) and opinion leaders (57%) report lower levels of agreement than 2007 levels.

# INVESTMENT: STIMULATION OF ECONOMIES

## BASE QUESTION

PLEASE INDICATE WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT: INVESTMENTS BETWEEN US AND CHINA WILL RESULT IN STIMULATION OF DOMESTIC ECONOMY IN BOTH US AND CHINA.



## US

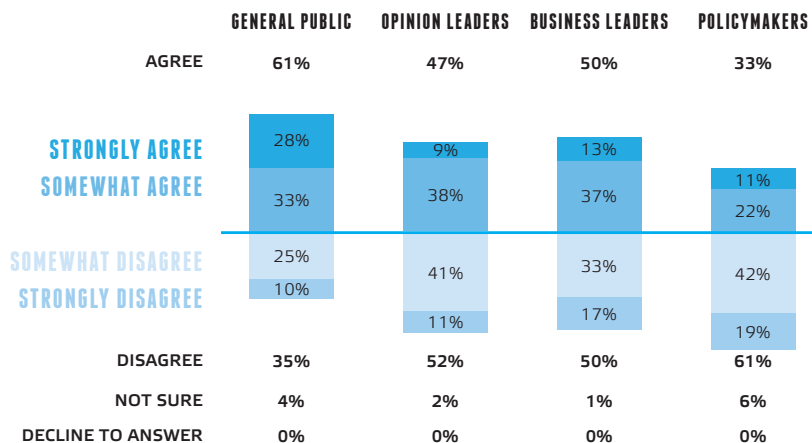
More than eight-in-ten business and opinion leaders (83%) and policymakers (81%) strongly or somewhat agree investments between the US and China will stimulate both countries' domestic economies.

The US public is less inclined to agree, with two-thirds (67%) reporting some level of agreement, and only one-in-five (19%) strongly agreeing.

# INVESTMENT: LOSS OF US TECHNOLOGICAL ADVANTAGE TO A COMPETITOR

## BASE QUESTION

PLEASE INDICATE WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT: INVESTMENT BETWEEN THE US AND CHINA WILL RESULT IN THE LOSS OF US TECHNOLOGICAL ADVANTAGE TO A COMPETITOR.



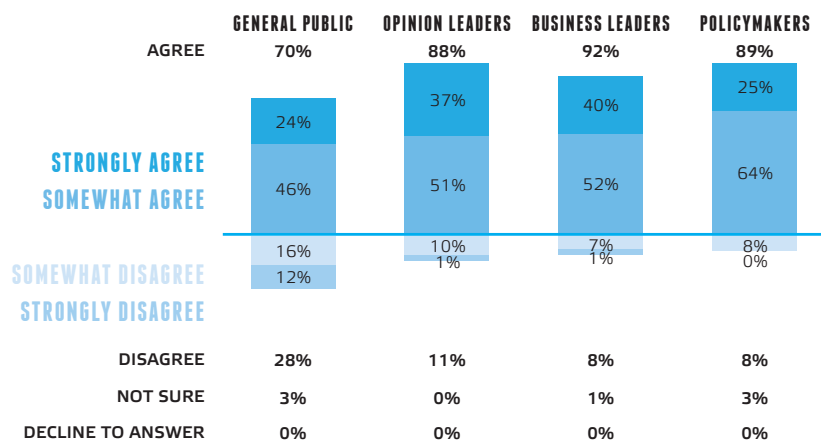
## US

Over six-in-ten US public respondents (61%) strongly or somewhat agree investments between the US and China will result in the loss of US technological advantage to a competitor, higher than any other respondent group.

About half of opinion and business leaders disagree that bilateral investments will result in the loss of US technological advantage.



# INVESTMENT: CLOSER TIES BETWEEN THE TWO SUPERPOWERS



## BASE QUESTION

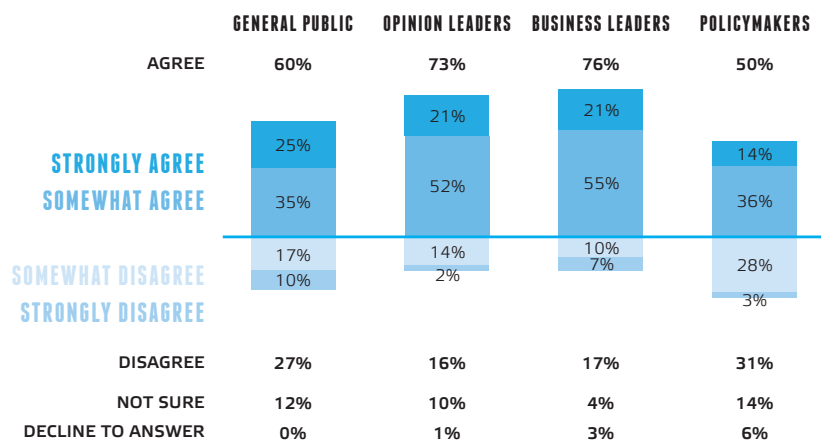
PLEASE INDICATE WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT: INVESTMENTS BETWEEN THE US AND CHINA WILL RESULT IN CLOSER TIES BETWEEN THE TWO SUPERPOWERS.

## US

Majorities of all respondent groups strongly or somewhat agree that investments between the US and China will result in closer ties between the two superpowers.

Business leaders (40%) and opinion leaders (37%) indicate the highest levels of those who strongly agree.

# INVESTMENT: INCREASE CHINESE PURCHASE OF US TREASURY BONDS



## BASE QUESTION

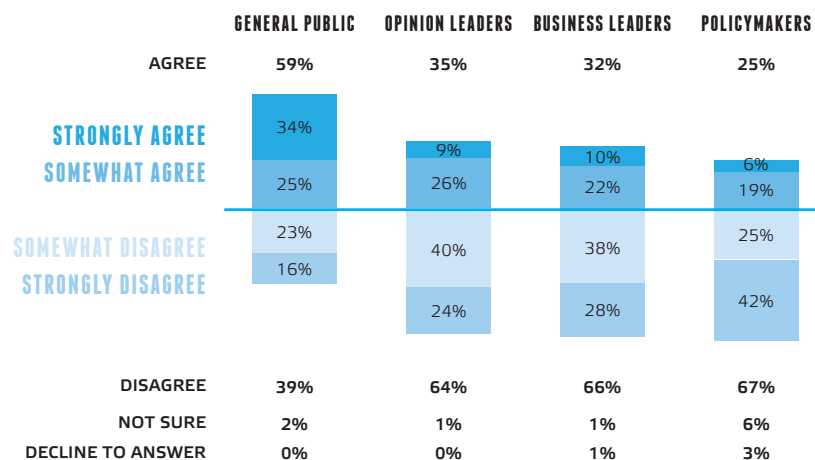
PLEASE INDICATE WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT: INVESTMENTS BETWEEN THE US AND CHINA WILL RESULT IN AN INCREASE IN THE CHINESE PURCHASE OF US TREASURY BONDS.

## US

Three-quarters of business (76%) and opinion leaders (73%) strongly or somewhat agree investments between the US and China will result in increased Chinese purchase of US Treasury bonds.

One-in-four US public (25%) and one-in-five business (21%) and opinion leaders (21%) strongly agree.

# INVESTMENT: RISK OF AMERICA LOSING CONTROL OVER ITS OWN ECONOMY



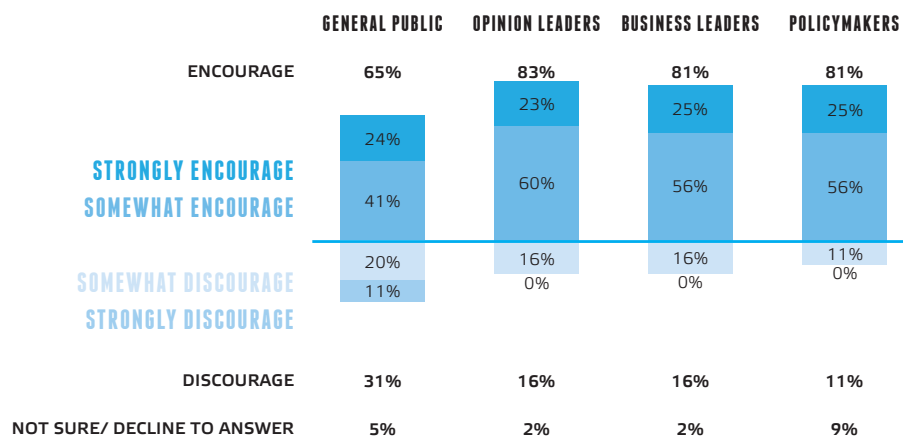
## BASE QUESTION

**PLEASE INDICATE WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, STRONGLY DISAGREE WITH THE FOLLOWING STATEMENT: INVESTMENT BETWEEN THE US AND CHINA WILL RESULT IN THE RISK OF AMERICA LOSING CONTROL OVER ITS OWN ECONOMY.**

## US

About 60% of the public thinks bilateral investments will result in the risk of America losing control over its own economy. About two-thirds of US elites disagree.

# INVESTMENT: CHINESE INVESTMENT IN THE US



## BASE QUESTION

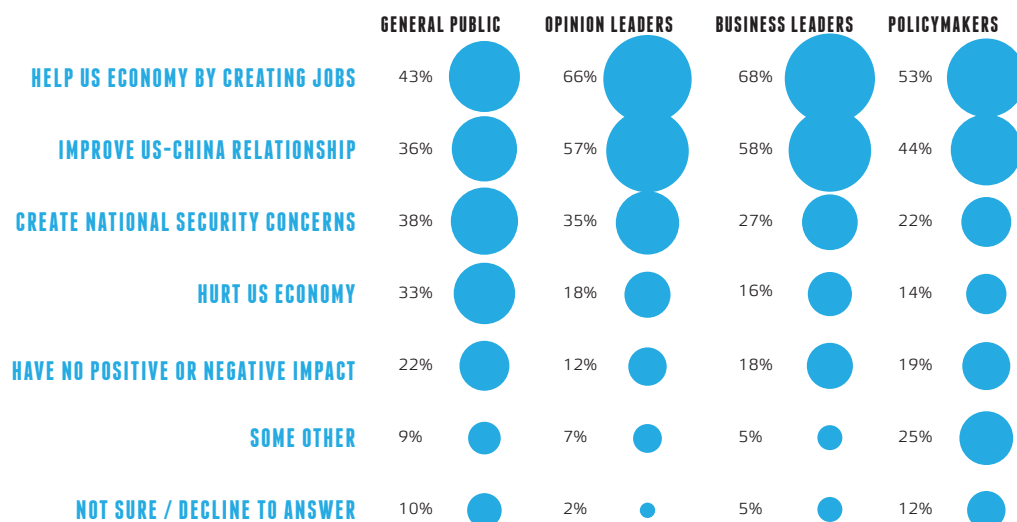
**HOW MUCH SHOULD THE UNITED STATES ENCOURAGE CHINESE INVESTMENT IN THE US?**

## US

Roughly one-quarter of each respondent group feels the US should strongly encourage China to invest in the United States.

About one-third of the public (31%) believes the US should discourage Chinese investment, double the percentage of elites with the same view.

# INVESTMENT: CONSEQUENCES OF CHINESE INVESTMENT



## BASE QUESTION

OTHER THAN BUYING US TREASURY BILLS, DO YOU THINK INCREASED INVESTMENT FROM CHINA IN THE US WILL...

US

A majority of business leaders, opinion leaders and policymakers and 43% of the public believe increased investment from China in the US will help the US economy by creating jobs.

# INVESTMENT: SAFETY IN US SECURITIES

US

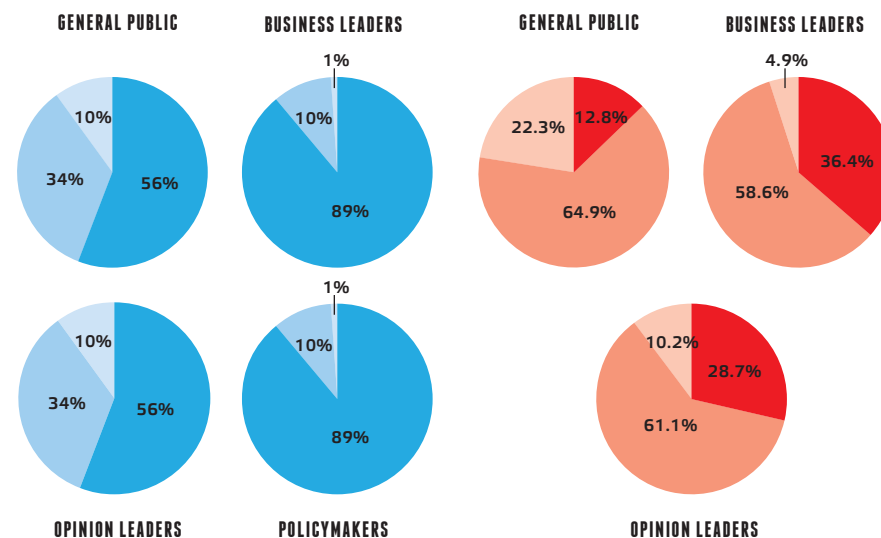
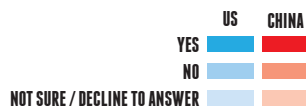
Nine-in-ten business (89%) and opinion leaders (56%) think the US Treasury bond is a safe investment, while 56% of the public also agree.

## BASE QUESTION

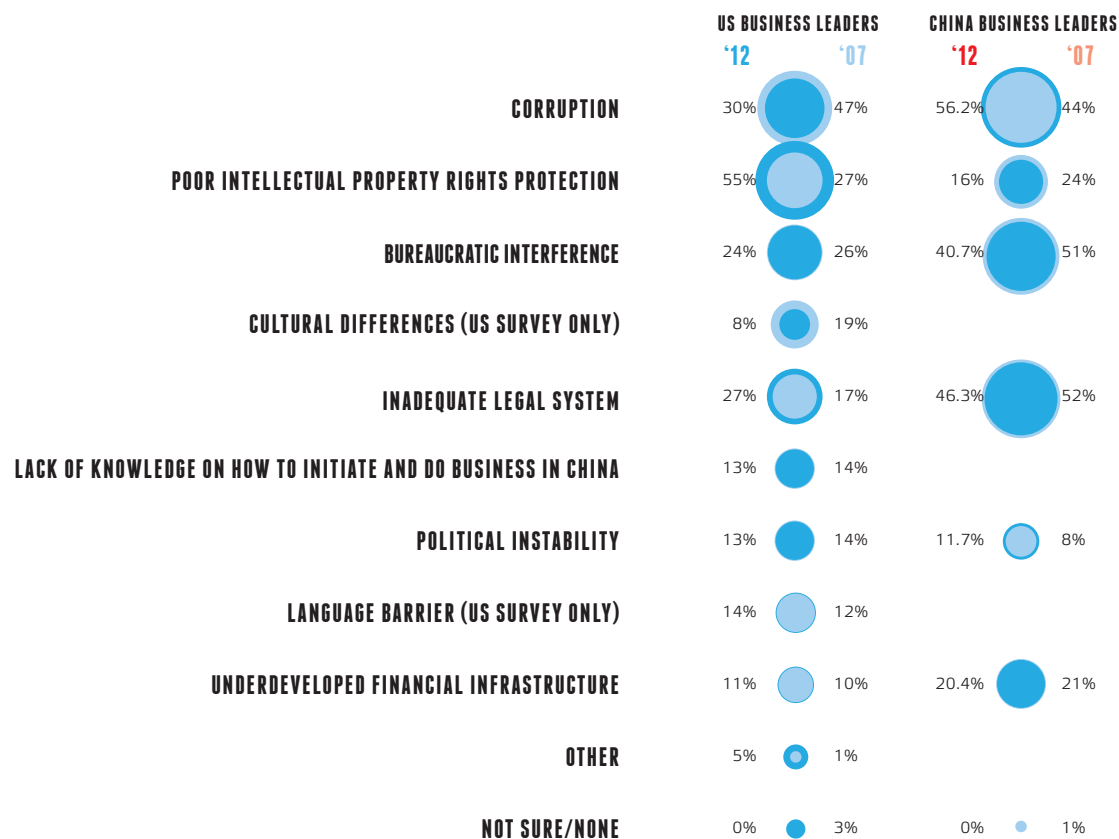
DO YOU THINK THE UNITED STATES TREASURY BOND IS A SAFE FINANCIAL INVESTMENT?

CHINA

All respondent groups think US Treasury bonds are not a safe financial investment.



# DOING BUSINESS: CONCERNS IN CHINA



## BASE QUESTION

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

*Percentages total more than 100% as respondents were asked to select the top two responses.*

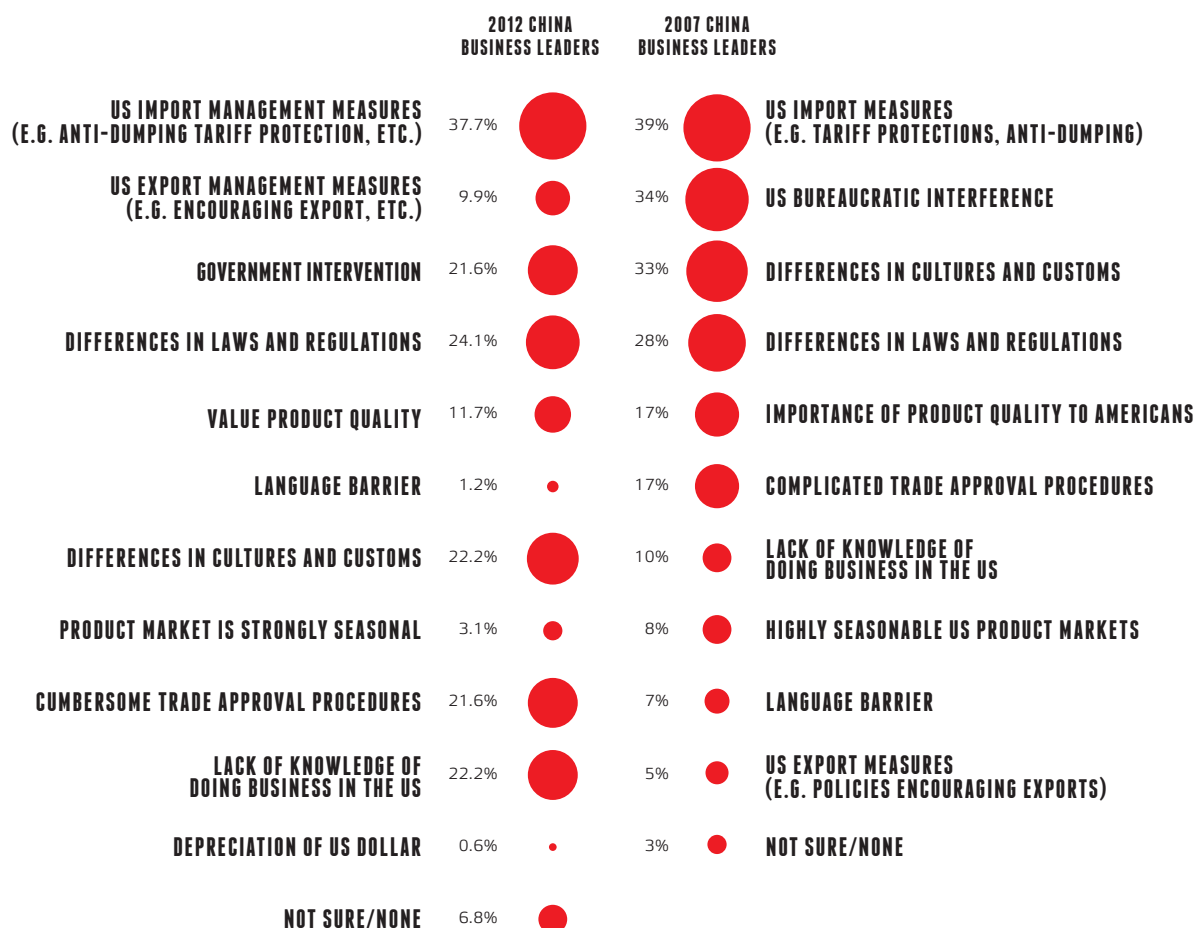
## US

Poor intellectual property rights protection ranks first as the top concern among US business leaders about doing business with China, more than double the 2007 level.

## CHINA

Top Chinese concerns include corruption, an inadequate legal system and bureaucratic interference.

# DOING BUSINESS: CONCERNS IN THE US



## BASE QUESTION

### WHAT ARE YOUR TWO GREATEST CONCERNS ABOUT DOING BUSINESS IN THE US?

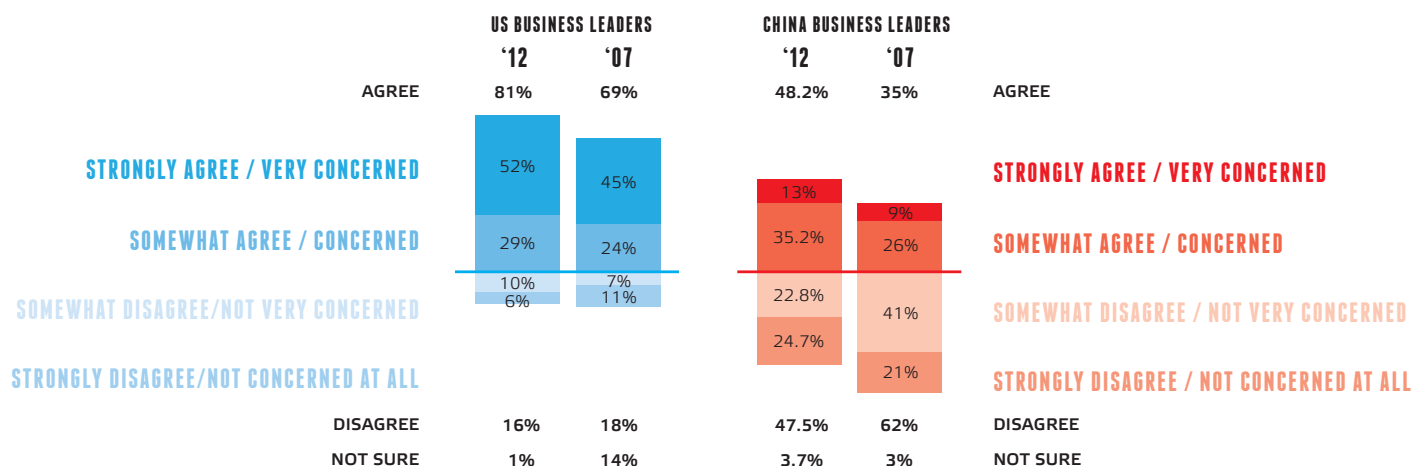
*This is a multiple-choice question  
and the total percentage of all  
choices is more than 100%.*

## CHINA

Business leaders are most concerned about US import measures such as tariffs and anti-dumping (37.7%). Other top concerns include legal and cultural differences and a lack of knowledge about doing business in the US.

Compared with 2007, the percentage of business leaders concerned about differences in cultures and customs and US bureaucratic intervention has relatively decreased (34% to 21.6%), while concern about a lack of knowledge on doing business in the US more than doubled (10% to 22.2%).

# INTELLECTUAL PROPERTY RIGHTS



## BASE QUESTION

US SURVEY 2012:

**IF YOUR COMPANY IS CONSIDERING DOING BUSINESS WITH CHINA, HOW CONCERNED WOULD YOU BE ABOUT CHINA'S INTELLECTUAL PROPERTY RIGHTS PROTECTION?**

US SURVEY 2007

CHINA SURVEY 2012 & 2007:

**PLEASE TELL ME WHETHER YOU AGREE WITH THE FOLLOWING STATEMENT: CHINA'S CURRENT INTELLECTUAL PROPERTY RIGHTS PROTECTION POLICY HAS A NEGATIVE IMPACT ON FOREIGN INVESTMENT.**

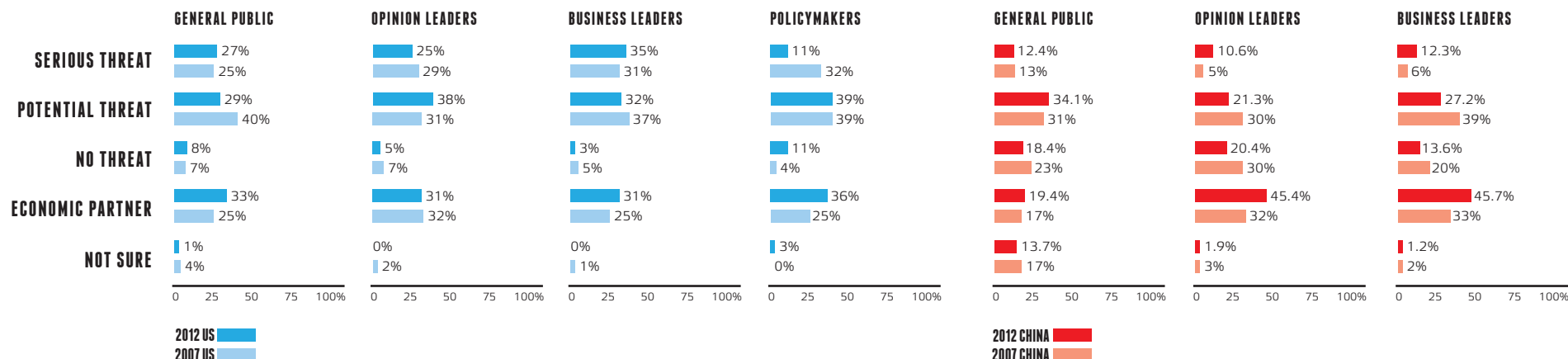
## US

Over 80% of US business leaders would be somewhat or very concerned about China's intellectual property rights protection if their company was considering doing business with China.

## CHINA

Chinese business leaders are divided as to whether China's intellectual property rights protection policy has a negative impact on international investment.

# CHINA'S GROWING ECONOMY



## BASE QUESTION

**HOW DO YOU VIEW CHINA'S EMERGENCE AS A GLOBAL ECONOMIC POWER—AS A SERIOUS THREAT TO THE US, A POTENTIAL THREAT, NO THREAT, OR AS AN ECONOMIC PARTNER OF THE US?**

## US

Approximately two-thirds of business (67%) and opinion leaders (63%) see China's emergence as a global economic power as a serious or potential threat to the US, roughly mirroring their views in 2007.

The proportion of the public (56%) who perceive China's economic power as a serious or potential threat has declined by 9% since 2007.

## CHINA

Over 45% of the Chinese public perceives China's emergence as an economic power as a serious or potential threat to the US, while roughly the same proportion of business leaders (45.7%) and opinion leaders (45.4%) view China as an economic partner of the US.

5

**MEDIA SOURCES**



# HIGHLIGHTS

---

## MEDIA SOURCES

The American public receives news about China primarily through English-language television. American elites receive their news about China primarily through English-language newspapers and secondarily through English-language Internet, a significant increase from 2007. Very few US adults rely on Chinese-language media sources. The Chinese public receives news about the US primarily through Chinese-language television and secondarily through Chinese-language Internet and newspaper. Over 80% of Chinese elites rely on the Chinese-language Internet to obtain news about the US; at least one-third of them also use English-language Internet. Chinese public and elites' usage of English-language media for news exceeds their US counterparts' use of Chinese-language media.

## PERCEIVED TRUTH IN MEDIA REPORTING

The high degree of skepticism from American and Chinese public and elites about the other nation's media reporting of their own nation is an indication of mutual distrust. A majority of Americans do not believe the Chinese media portrays an accurate picture of the US, and a majority of the Chinese respondents do not believe the American media portrays an accurate picture of China. More surprisingly, Americans and Chinese are also skeptical about their own nation's media reporting of the other nation – a majority of Americans do not believe the American media reports truthfully about China, and a majority of Chinese elites do not believe the Chinese media reports truthfully about the US. About half of the Chinese public (49%) thinks Chinese media reports about the US are accurate.

**73%**

OF THE US GENERAL PUBLIC  
RECEIVES NEWS ABOUT CHINA PRIMARILY THROUGH

**ENGLISH TV**

**85%**

OF THE CHINESE GENERAL PUBLIC  
RECEIVES NEWS ABOUT THE US PRIMARILY THROUGH

**CHINESE TV**

**88%**

OF US OPINION MAKERS  
RECEIVES NEWS ABOUT CHINA PRIMARILY THROUGH  
**ENGLISH NEWSPAPER**

**92%**

OF US POLICYMAKERS  
RECEIVES NEWS ABOUT CHINA PRIMARILY THROUGH  
**ENGLISH NEWSPAPER**

**85%**

OF CHINESE BUSINESS LEADERS  
RECEIVES NEWS ABOUT THE US PRIMARILY THROUGH  
**CHINESE INTERNET**

**80%**

OF CHINESE OPINION LEADERS  
RECEIVES NEWS ABOUT THE US PRIMARILY THROUGH  
**CHINESE INTERNET**

**A MAJORITY OF  
AMERICANS  
DO NOT BELIEVE  
THE CHINESE MEDIA  
PORTRAYS AN ACCURATE  
PICTURE OF THE US**



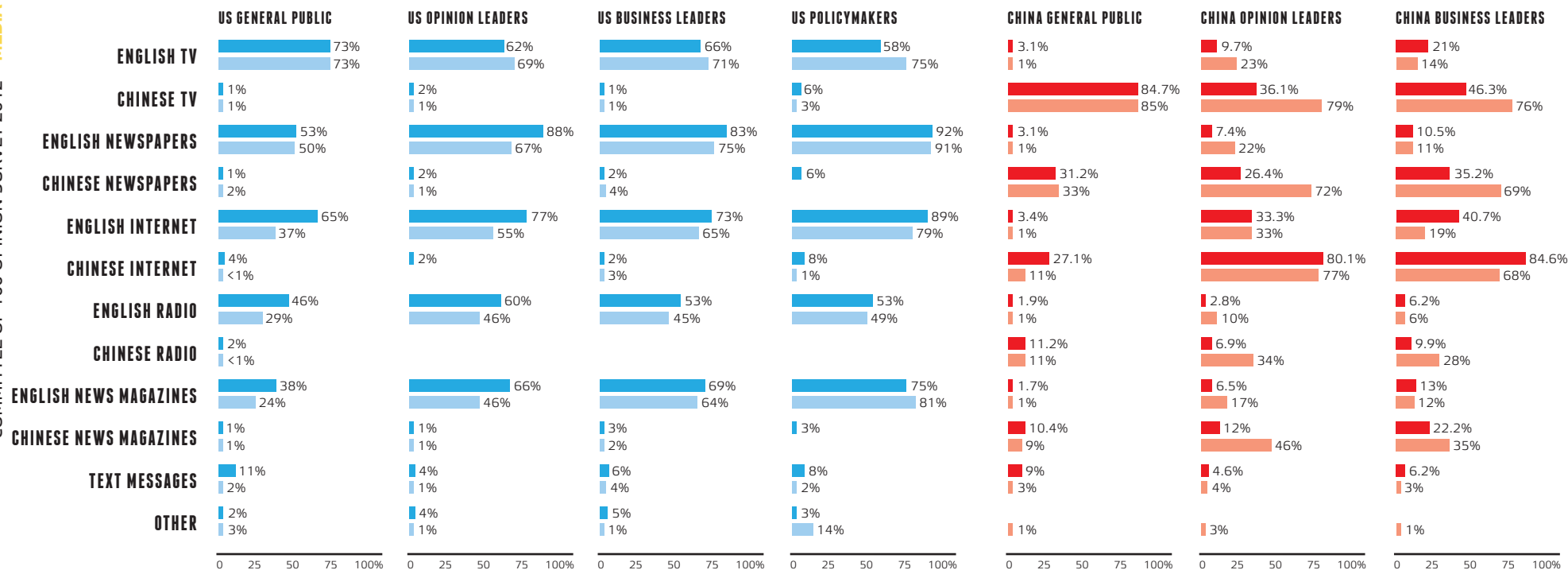
p. 85  
-86



**AND A MAJORITY OF  
CHINESE  
DO NOT BELIEVE  
THE AMERICAN MEDIA  
PORTRAYS AN ACCURATE  
PICTURE OF CHINA**

# MEDIA SOURCES

# MEDIA SOURCES



## BASE QUESTION

US SURVEY:

**FROM WHICH SOURCES DO YOU GET MUCH OF YOUR NEWS ABOUT CHINA?**

CHINA SURVEY:

**FROM WHICH SOURCES DO YOU GET MUCH OF YOUR NEWS ABOUT THE US?**

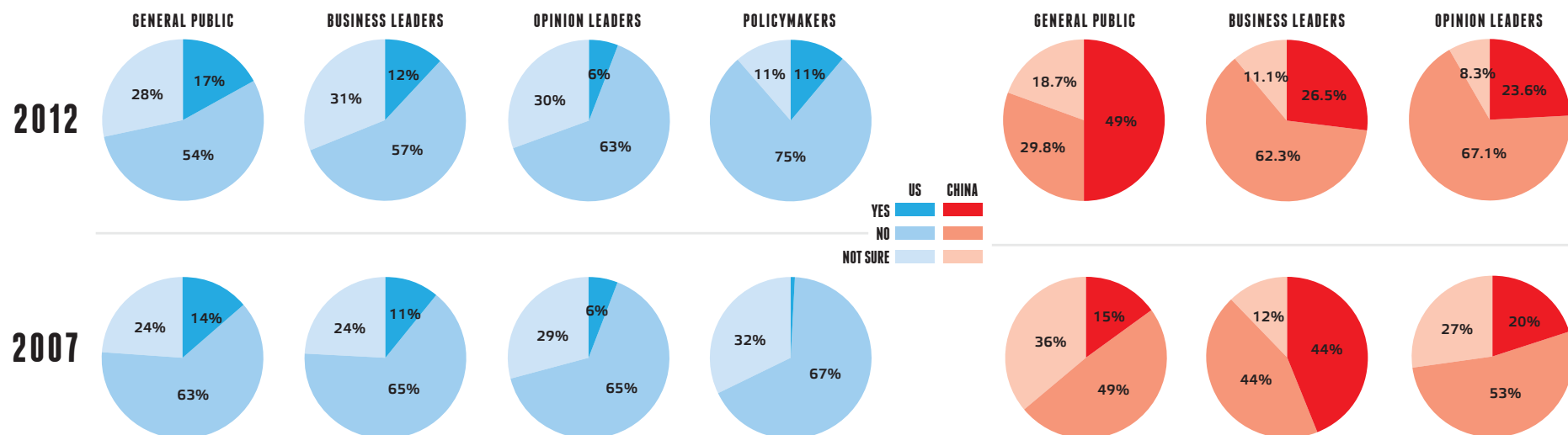
## US

The public receives news about China primarily through English-language television. Elites receive news about China primarily through English-language newspapers and secondarily through English-language Internet, a significant increase from 2007.

## CHINA

The public receives news about the US primarily through Chinese-language television and secondarily through Chinese-language newspapers. Over 80% of Chinese elites rely on Chinese-language Internet to obtain news about the US; at least one third of them also receive news through English-language Internet.

# PERCEIVED TRUTH IN CHINA MEDIA REPORTING



## BASE QUESTION

**DO YOU THINK THAT THE CHINESE MEDIA PORTRAYS AN ACCURATE PICTURE OF THE US?**

## US

A majority of all respondent groups think the Chinese media does not portray an accurate picture of the US, although these levels have dropped slightly since 2007, except among policymakers.

## CHINA

About half of the Chinese public (49%) thinks Chinese media reports are accurate.

In contrast, 62.3% of business leaders and 67.1% of opinion leaders think the Chinese media fails to report America accurately.

# PERCEIVED TRUTH IN US MEDIA REPORTING

## BASE QUESTION

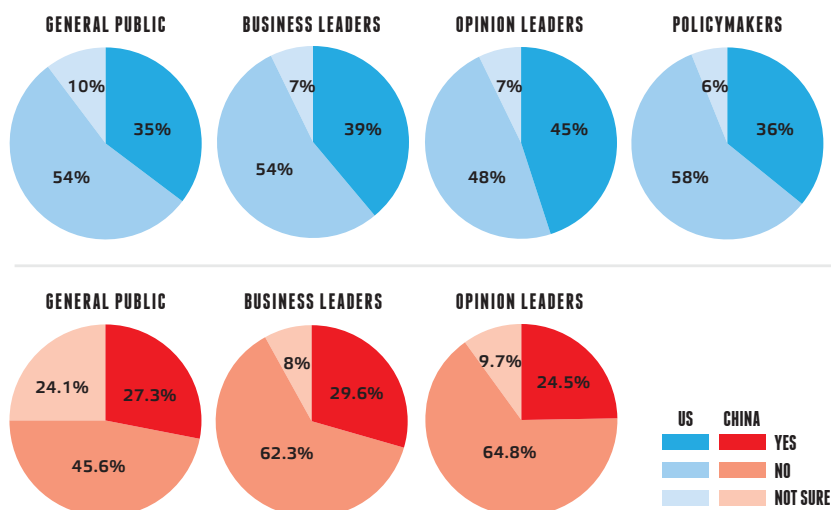
NOW, THINKING ABOUT THE US MEDIA, DO YOU THINK THEY PORTRAY AN ACCURATE PICTURE OF CHINA?

### US

About 50% of all respondent groups do not think the US media portrays an accurate picture of China.

### CHINA

Chinese elites – business (62.3%) and opinion leaders (64.8%) – and the public (45.6%) think the American media fails to portray China accurately.

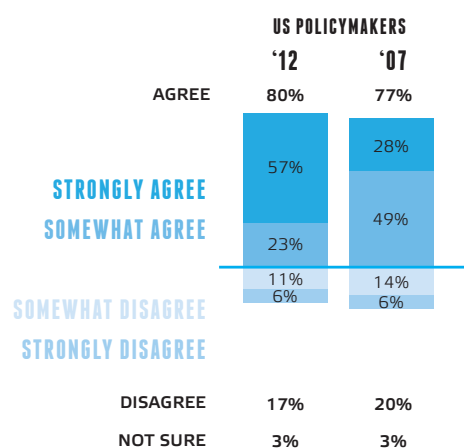


# US ACCESS TO INFORMATION ON CHINA

## BASE QUESTION

PLEASE TELL ME WHETHER YOU AGREE WITH THE FOLLOWING STATEMENT:

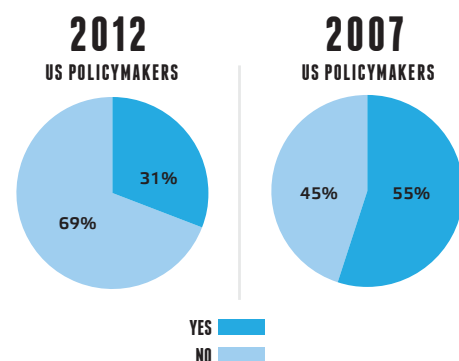
**I FEEL MY MEMBER OF CONGRESS AND OUR CONGRESSIONAL OFFICE HAVE ACCESS TO ENOUGH RELEVANT INFORMATION ABOUT CHINA AND THE STATE OF US-CHINA RELATIONS.**



### US

While the overall proportion of policymakers who agree or disagree remains relatively consistent compared to 2007, the number who strongly agree that their Congress member and Congressional office has access to enough relevant information about China and the state of the US-China relations doubled between 2007 and 2012, from 28% to 57%.

# USEFULNESS OF COMMUNICATION WITH CHINESE OFFICIALS



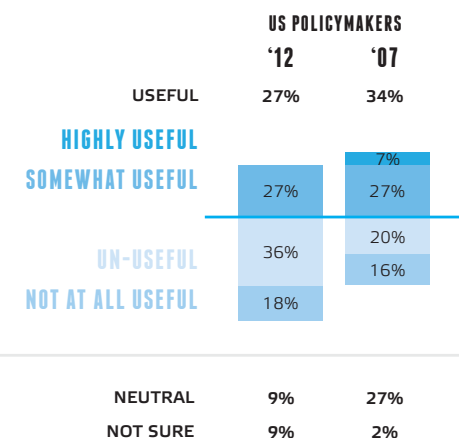
## BASE QUESTION

CONGRESSIONAL STAFFERS  
AND THINK TANKS:

**HAVE YOU EVER  
COMMUNICATED DIRECTLY  
WITH CHINESE OFFICIALS ON  
US-CHINA ISSUES?**

**US**

One-third (31%) indicated they have communicated directly with Chinese officials on US-China issues, down significantly from 2007 (-24%).



## BASE QUESTION

COMMUNICATED DIRECTLY  
WITH CHINESE OFFICIALS:

**ON A SCALE OF 1 TO 5 WITH  
1 BEING 'NOT AT ALL USEFUL'  
AND 5 BEING 'HIGHLY USEFUL,'  
HOW WOULD YOU RATE  
THE USEFULNESS OF  
YOUR EXCHANGE WITH  
CHINESE OFFICIALS?**

**US**

Of those who communicated directly with Chinese officials, one-in-four (27%) indicate the exchange was somewhat useful. However, 54% felt the exchange was not useful.

6

**DOMESTIC VIEWS**



# HIGHLIGHTS

## VIEW ON NATIONAL DIRECTION

Continuing the pattern in 2007, the American public is generally not satisfied with the direction in which the US is heading. Only 36% of the American public thinks that their country is on the right track, a minimal change from 2007. Approximately 58% believes the country is on the wrong track, essentially the same as 59% in 2007. US opinion (47%) and business leaders (48%) tend to be more optimistic now with about half thinking the country is on the right track, slightly higher than 40% and 44%, respectively, in 2007. The Chinese public (74.1%) and elites – opinion (64.8%) and business leaders (72.2%) – think China is on the right track, a 20-percentage point drop among elites compared to 2007.

## TOP DOMESTIC CONCERNS

Jobs and the economy are by far the top concerns of the American public and elites. Their other concerns include politics, government, campaign finance reform, budget, spending, and deficit. The Iraq war, peace and foreign policy – top issues in 2007 – fell to the third tier. The Chinese general public puts corruption as the foremost concern; business leaders identify AIDs and other communicable diseases; the opinion leaders place top emphasis on morality, values and Taiwan.

## SUPERPOWER'S ROLE FOR CHINA

As China becomes a superpower, the Chinese public and elites see China's primary role is to maintain stable growth and improve its citizens' quality of life. Notable disagreement exists on the secondary role – Chinese elites believe in improving social fairness and equity and strengthening the legal system, but the Chinese public wants to enhance military capabilities to protect national interests. Regarding China's domestic reforms, American and Chinese public and elites agree China's emerging middle class could play a profound role in making social and political changes in China.

## GROWING ENVIRONMENT FOR CHINESE YOUTH

About 36% of the Chinese public believes China will provide Chinese youth with better opportunities, but 38% of Chinese opinion leaders and 47% of business leaders believe the US is the top pick for opportunities.

## PERCEPTION OF CHINESE AMERICANS IN AMERICA

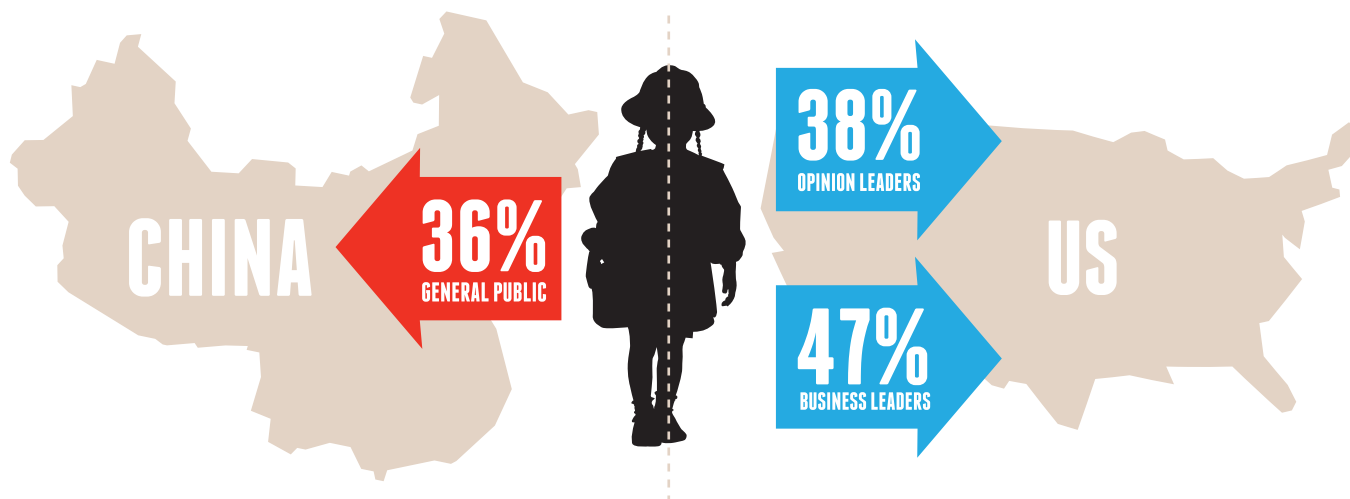
Generally speaking, when it comes to economic or military issues between the US and China, 67% of the American public believes Chinese Americans will support the US; American elites sharing the view exceed 77%. However, 25% of the American public believes Chinese Americans will support China with 7% not sure about Chinese Americans' position.

## TEACHING CHINESE IN AMERICA

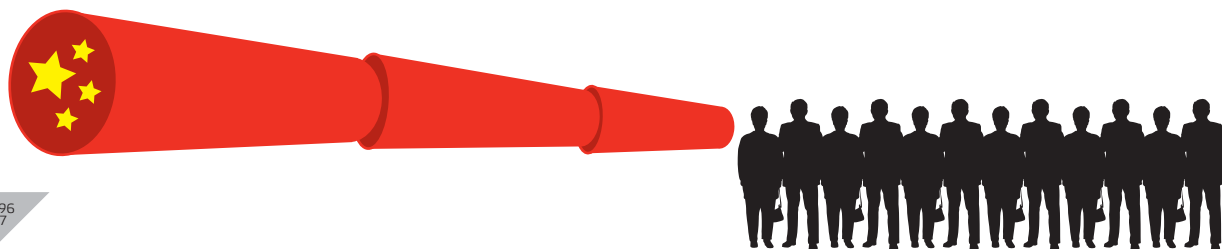
Large majorities of American public and elites believe it is a good idea to teach Chinese language in local schools and would like their children to learn Chinese if schools offered courses. Only one-quarter of the American public knows that Chinese is being taught in their local schools.

## CHINESE YOUTH WILL HAVE BETTER OPPORTUNITIES IN...

p 99



AMERICAN AND CHINESE PUBLIC AND ELITES SIMILARLY BELIEVE  
**CHINA'S EMERGING MIDDLE CLASS**  
 COULD PLAY A PROFOUND ROLE IN MAKING  
 SOCIAL AND POLITICAL CHANGES IN CHINA.



p 96  
-97

## EACH NATION'S MOOD ON DIRECTION

p 93



THE **CHINESE** PUBLIC AND ELITES THINK **CHINA IS ON THE RIGHT TRACK.**

AMERICANS ARE GENERALLY **NOT SATISFIED** WITH THE DIRECTION THE US IS HEADING.

**ONLY 1/4**

p 100

OF THE AMERICAN PUBLIC KNOWS  
**THAT CHINESE IS  
BEING TAUGHT  
IN THEIR LOCAL SCHOOLS.**

LEARN 中文

LARGE MAJORITIES OF AMERICAN PUBLIC AND ELITES  
BELIEVE IT IS A GOOD IDEA TO

p 101

**TEACH CHINESE  
LANGUAGE  
IN LOCAL SCHOOLS**

AND WOULD LIKE THEIR CHILDREN TO LEARN CHINESE  
IF SCHOOLS OFFERED COURSES.

THE CHINESE PUBLIC'S  
TOP GOAL IS TO  
**GET RICH**



**A HAPPY FAMILY**  
IS THE LIFE GOAL  
FOR THREE-FOURTHS  
OF THE **US PUBLIC**

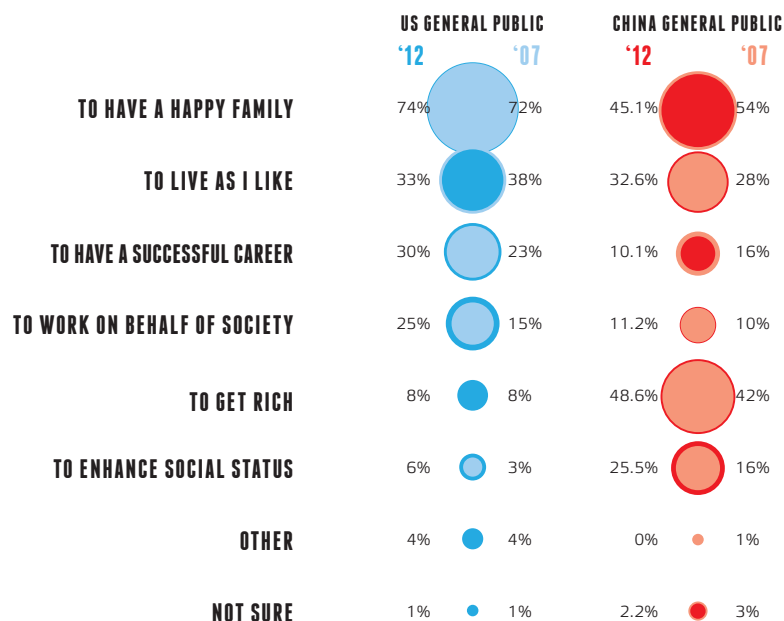
p 92



**DOMESTIC VIEWS**

**USHINA**  
PUBLIC PERCEPTIONS  
OPINION SURVEY 2012

# EACH NATION'S CURRENT LIFE GOALS



BASE QUESTION

**WHICH OF THE FOLLOWING  
COMES CLOSEST TO YOUR  
CURRENT PERSONAL GOAL  
IN LIFE?**

## US

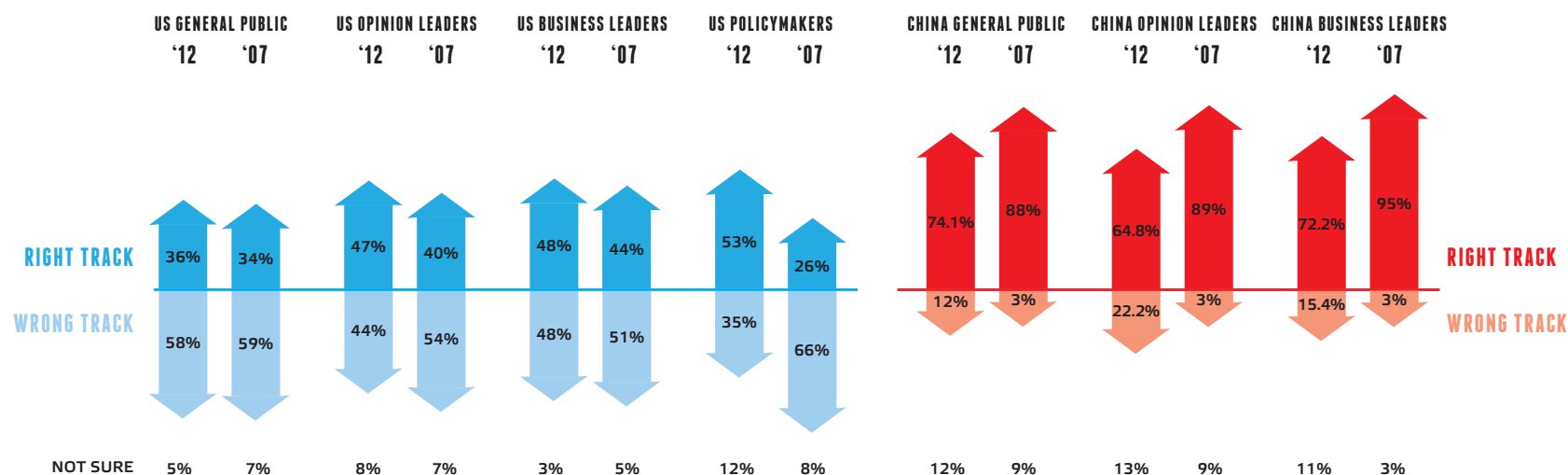
Three-quarters of the US public (74%) indicate having a happy family as their current personal goal, consistent with 2007.

## CHINA

Wealth and family are the two priorities of the Chinese public: 48.6% give greater weight to being rich, and 45.1% hope to have a happy family. Only 11.2% of the respondents choose to work on behalf of society.

In 2007, to have a happy family ranked first, but in 2011, the percentage drops (53.5% -> 45.1%), whereas the percentage of those selecting "to be rich" rises (42.3% -> 48.6%).

# EACH NATION'S MOOD ON DIRECTION



## BASE QUESTION

### US SURVEY:

**OVERALL, DO YOU THINK THAT THE US IS HEADED ON THE RIGHT TRACK OR ARE THINGS ON THE WRONG TRACK?**

### CHINA SURVEY:

**OVERALL, DO YOU THINK THAT CHINA IS HEADED ON THE RIGHT TRACK OR ARE THINGS ON THE WRONG TRACK?**

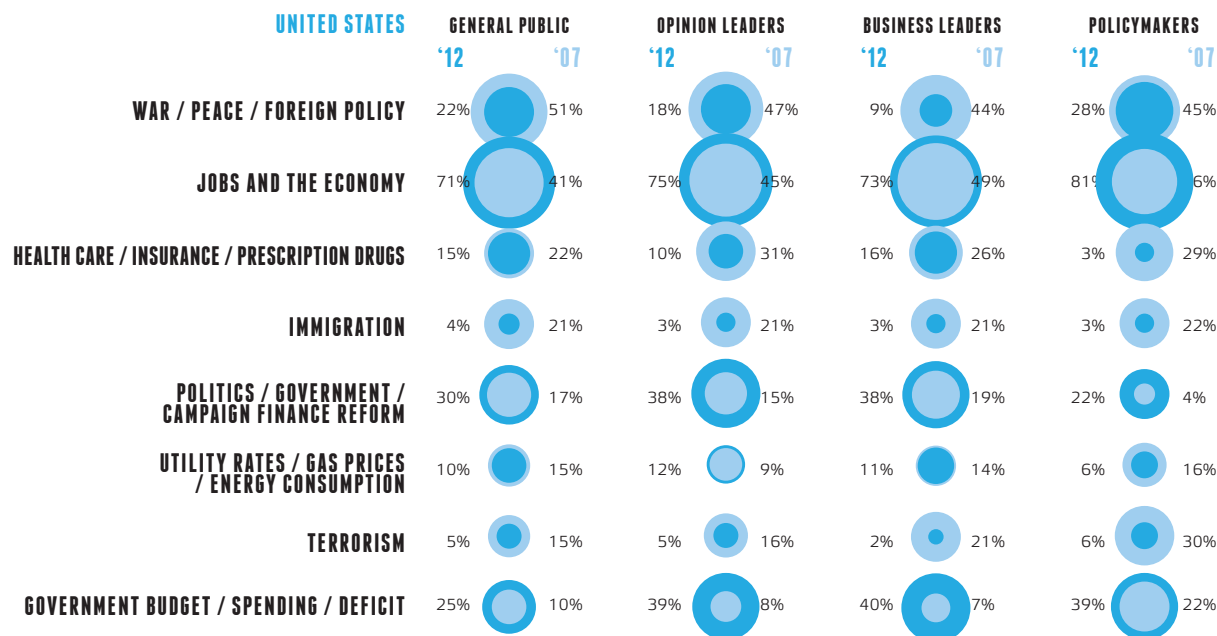
## US

The American public is generally not satisfied with the direction the US is heading, continuing the pattern in 2007. Only 36% of the American public thinks their country is on the right track, compared to 34% in 2007. American elites tend to be more optimistic now with nearly half thinking the country is on the right track, compared to 26% - 44% in 2007.

## CHINA

A majority of the Chinese public (74.1%), opinion (64.8%) and business leaders (72.2%) think China is on the right track, a decrease of up to 24% compared to 2007.

# TOP ISSUES FOR THE US



## BASE QUESTION

US SURVEY:

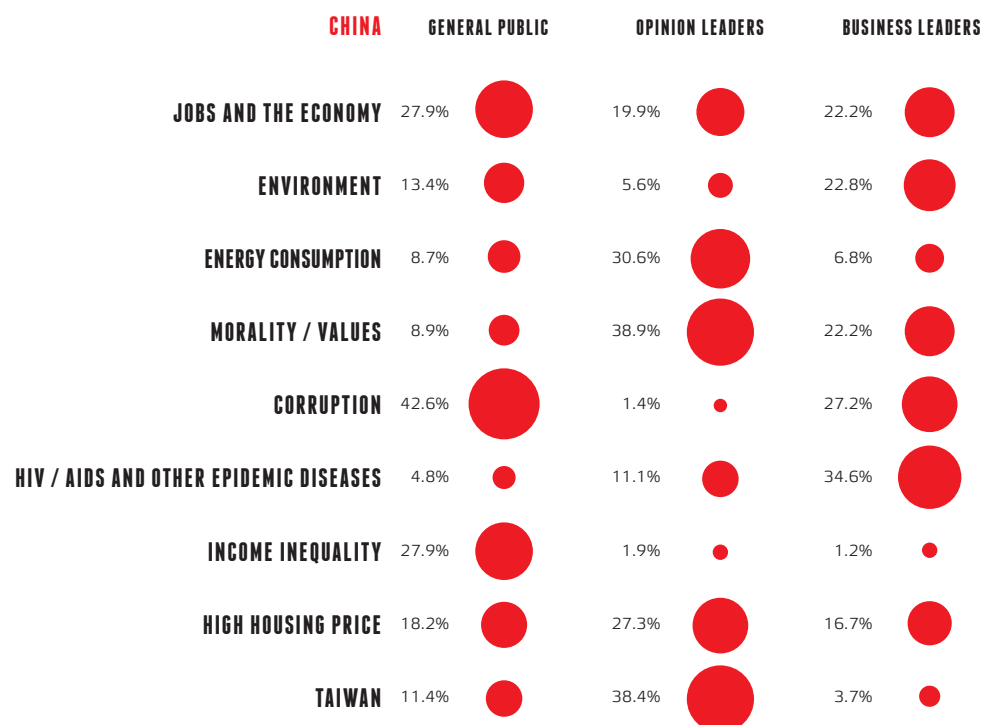
**WHAT ARE THE THREE MOST IMPORTANT ISSUES FACING THE US TODAY?**

## US

Overwhelming majorities of all four groups cite jobs and the economy as one of the top three issues facing the US. These proportions represent dramatic increases from 2007, when less than half of all four groups identified this issue as a primary concern.

Increasing proportions of all groups identify politics/government/campaign finance reform as one of the three most important issues facing the US. There has been a decline in the numbers citing war/peace/foreign policy since 2007.

# TOP ISSUES FOR CHINA



## BASE QUESTION

CHINA SURVEY:  
**WHAT IS THE MOST  
IMPORTANT ISSUE FACING  
CHINA TODAY?**

## CHINA

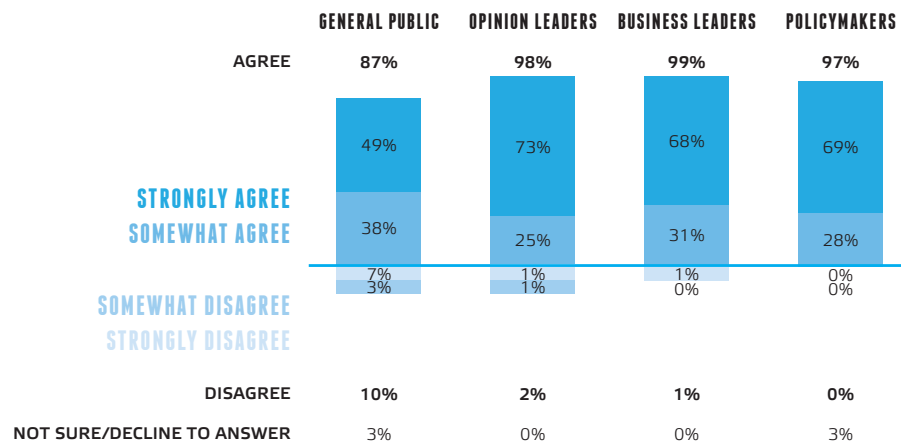
The top three issues rated by the public all relate to people's livelihood: corruption (42.6%), income inequality (27.9%), jobs and economy (27.9%).

Business leaders cite HIV/AIDS and other epidemic diseases (34.6%), corruption (27.2%) and environment (22.8%) as the top three issues.

Opinion leaders rank moral values (38.9%), Taiwan issue (38.4%) and energy consumption (30.6%) as the three most important issues. As to high housing prices, opinion leaders rank it fourth (27.3%), the highest among the three groups.

# US VIEWS OF CHINA'S EMERGING MIDDLE CLASS

## CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO **SOCIAL** CHANGE.



### BASE QUESTION

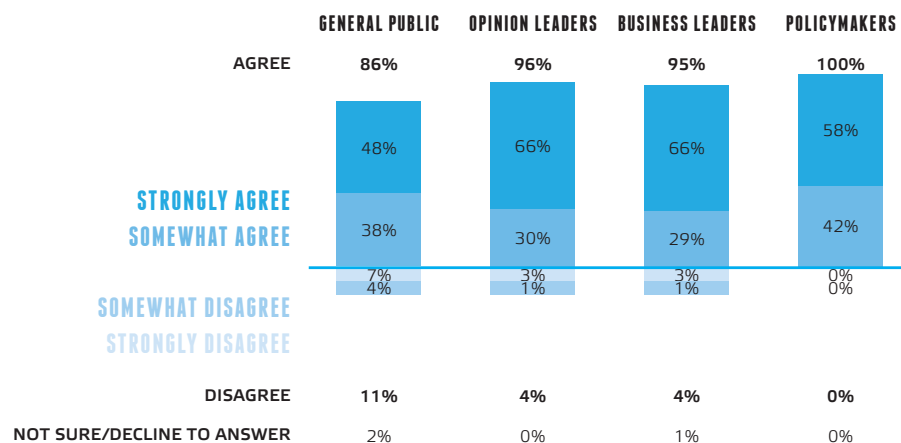
#### US SURVEY:

**PLEASE TELL ME WHETHER YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, OR STRONGLY DISAGREE WITH THE FOLLOWING STATEMENTS:**

**STATEMENT A: CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO SOCIAL CHANGE.**

**STATEMENT B: CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO POLITICAL CHANGE.**

## CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO **POLITICAL** CHANGE.



### US

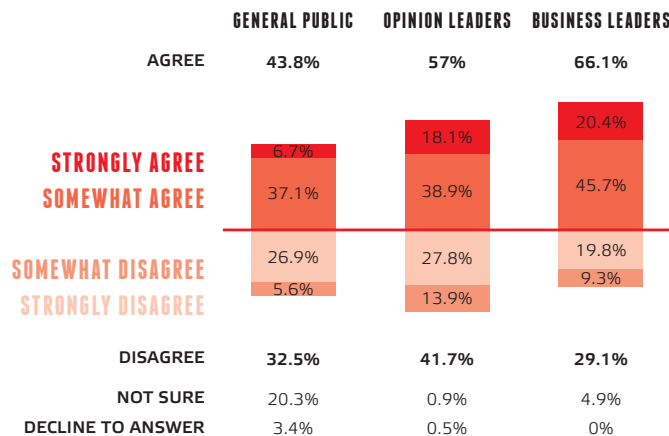
Two-thirds of all business (66%) and opinion leaders (66%) and about half of the public (48%) strongly agree China's growing middle class could contribute to political change.

Similar proportions of each group strongly agree China's growing middle class could contribute to social change.



# CHINESE VIEWS OF CHINA'S EMERGING MIDDLE CLASS

## CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO **SOCIAL AND POLITICAL CHANGE.**



### BASE QUESTION

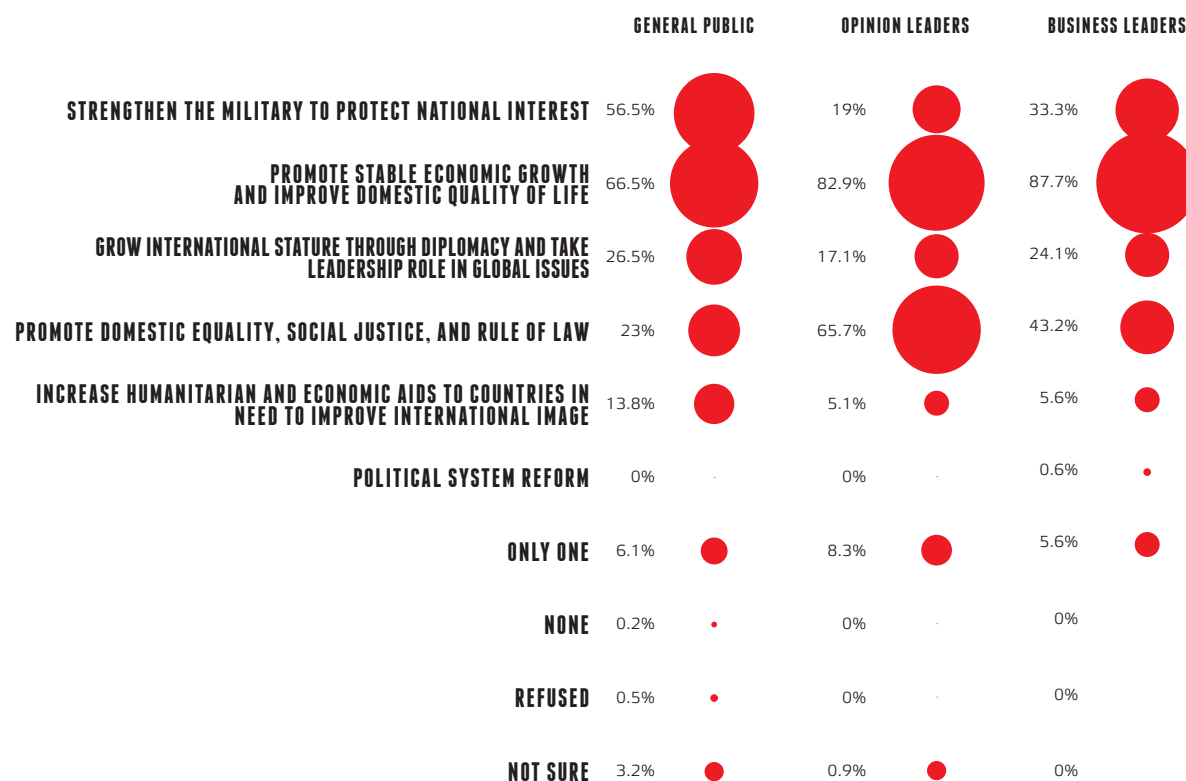
#### CHINA SURVEY:

**DO YOU STRONGLY AGREE, SOMEWHAT AGREE, SOMEWHAT DISAGREE, OR STRONGLY DISAGREE THAT CHINA'S GROWING MIDDLE CLASS COULD CONTRIBUTE TO SOCIAL AND POLITICAL CHANGE?**

## CHINA

A majority of business (66.1%) and opinion leaders (57%) and 43.8% of the public strongly agree or somewhat agree that China's middle class could contribute to social and political change.

# CHINA: SUPERPOWER'S ROLE



## BASE QUESTION

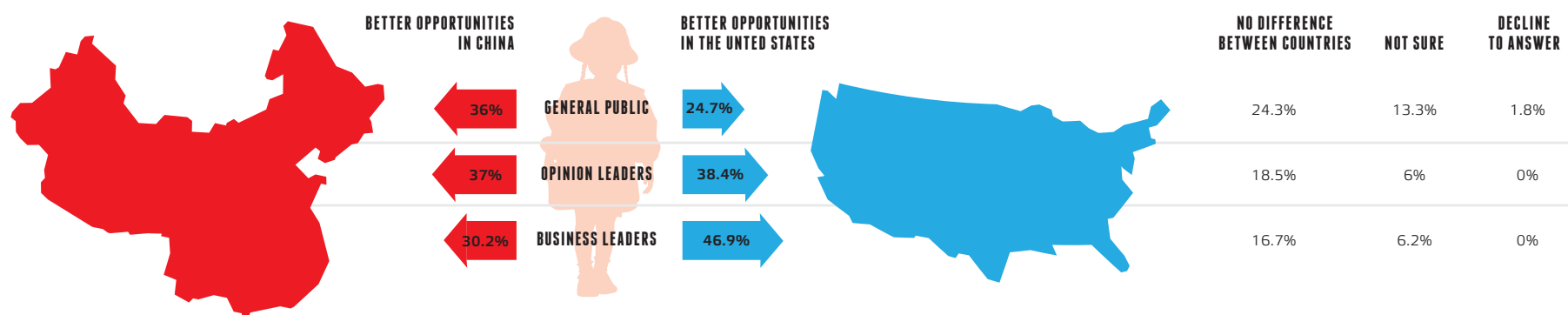
**AS CHINA BECOMES A GLOBAL SUPERPOWER, WHAT DO YOU THINK CHINA SHOULD DO?**

*This is a multiple-choice question and the total percentage of all choices is more than 100%.*

## CHINA

As China becomes a global superpower, the public (66.5%), business leaders (87.7%) and opinion leaders (82.9%) indicate China should first promote stable economic growth and improve domestic quality of life. The public also highly rank strengthening the military, and the elite highly rank domestic equality, social justice and rule of law.

# CHINA: GROWING ENVIRONMENT FOR CHINESE YOUTH



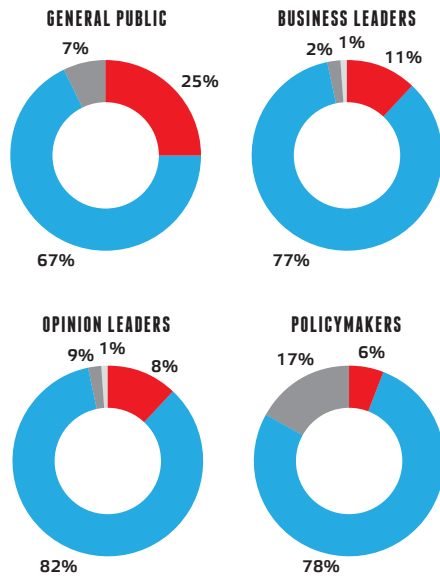
## BASE QUESTION

**DO YOU THINK THE YOUTH  
IN CHINA WILL HAVE BETTER  
GROWTH OPPORTUNITIES  
IN CHINA OR IN THE  
UNITED STATES?**

## CHINA

Approximately 36% of the Chinese public believes China will provide Chinese youth with better opportunities, but 38%-47% of the Chinese elites believe the US is the top pick for opportunities.

# US: PERCEPTION OF CHINESE AMERICANS



## BASE QUESTION

**GENERALLY SPEAKING, WHEN IT COMES TO ECONOMIC/ MILITARY ISSUES BETWEEN THE UNITED STATES AND CHINA, IN YOUR VIEW, ARE CHINESE AMERICANS MORE LIKELY TO SUPPORT THE US OR CHINA?**

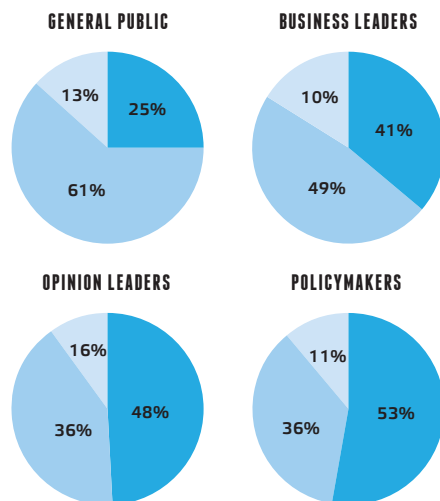


## US

Strong majorities of opinion leaders (82%), policymakers (78%), business leaders (77%), and the public (67%) believe that when it comes to economic or military issues, Chinese Americans are more likely to support the United States.

Notably, one-quarter of the American public (25%) believe Chinese Americans are more likely to support China.

# US: TEACHING CHINESE AT LOCAL SCHOOLS



## BASE QUESTION

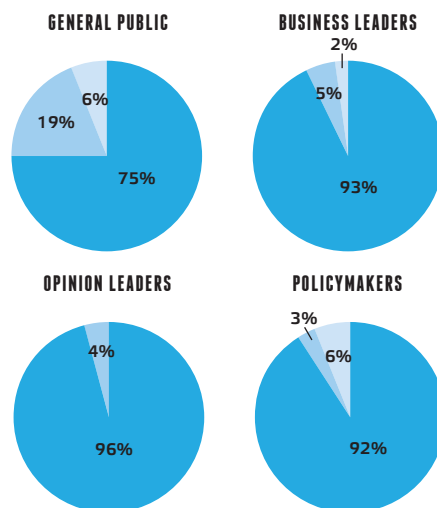
**DO YOU KNOW IF CHINESE IS BEING TAUGHT AT YOUR LOCAL SCHOOLS?**



## US

Elites (41%-53%) know that Chinese is being taught in their local schools; however, only one-quarter of the public (25%) knows that Chinese is being taught in school.

# US: CHILDREN TAKING CHINESE IN SCHOOLS



## BASE QUESTION

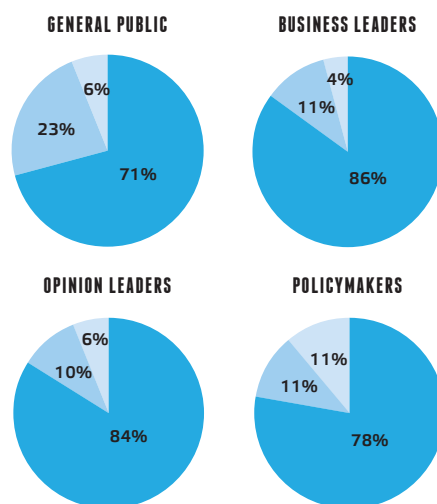
**DO YOU THINK IT IS A GOOD IDEA OR A BAD IDEA TO TEACH CHINESE IN SCHOOL?**



## US

Most respondents of each group think it is a good idea to teach Chinese in school.

# US: VIEW OF TEACHING CHINESE IN SCHOOLS



## BASE QUESTION

**IF CHINESE WERE BEING OFFERED IN SCHOOLS IN YOUR AREA, WOULD YOU WANT YOUR CHILD TO TAKE CHINESE?**



## US

Across all groups, a large majority of respondents would like their child to take Chinese if it were being offered.

## APPENDIX A UNITED STATES: INITIAL THOUGHTS OF CHINA

	2012				2007			
	GENERAL PUBLIC (N=1000)	BUSINESS LEADERS (N=120)	OPINION LEADERS (N=244)	POLICYMAKERS (N=36)	GENERAL PUBLIC	BUSINESS LEADERS	OPINION LEADERS	POLICYMAKERS
Culture / History / Food / Great Wall	23%	4%	8%	6%	18%	7%	3%	1%
Large Country / Large Population/	15%	15%	12%	14%	18%	9%	25%	1%
Cheap Products / Large Amount of Imports / Wal-Mart	13%	9%	2%	-	12%	11%	8%	5%
Economic Growth / Booming Economy	5%	20%	28%	17%	7%	30%	10%	19%
Trade Imbalance / US Trade Deficit / Debt	5%	8%	11%	8%	4%	7%	8%	10%
Authoritarian / Communist / Mao	5%	3%	5%	6%	6%	1%	5%	2%
Outsourcing / Cheap Labor / Loss of US Jobs	4%	5%	3%	--	6%	13%	4%	3%
Growing World Power / Future Superpower	3%	18%	12%	28%	7%	3%	12%	37%
Growing Threat / Rival	3%	3%	2%	3%	4%	3%	2%	12%
Food Safety Problems / Toy Recalls	2%	3%	1%	-	n/a	n/a	n/a	n/a
Electronics / Technology / High Technology Manufacturer	2%	1%	*	-	n/a	n/a	n/a	n/a
Friends / Family Members There	2%	1%	-	-	n/a	n/a	n/a	n/a
Dishware	2%	-	-	-	n/a	n/a	n/a	n/a
Pollution / Energy Consumption	1%	3%	2%	3%	2%	2%	2%	2%
Trade Relations / International Trade Relations	1%	-	2%	-	n/a	n/a	n/a	n/a
Human Rights Violations / Falun Gong / Tibet / Tiananmen Square	1%	2%	1%	3%	3%	3%	5%	3%
Tourism / Vacation Spot / Travel	1%	-	1%	-	n/a	n/a	n/a	n/a
Country / Location On Map	1%	1%	0%	-	n/a	n/a	n/a	n/a
Investments Made to US Economy	1%	-	0%	-	n/a	n/a	n/a	n/a
Panda Bears	1%	-	-	-	n/a	n/a	n/a	n/a
Dislike / Don't Trust Them	1%	-	-	-	n/a	n/a	n/a	n/a
Specific People (All Name Mentions)	1%	-	-	-	n/a	n/a	n/a	n/a
Intellectual Property Rights / Stealing Intellectual Property Rights / Piracy	0%	2%	1%	3%	n/a	n/a	n/a	n/a
Manufacturing	0%	3%	1%	-	n/a	n/a	n/a	n/a
Competition / Economic Competition	0%	1%	1%	-	n/a	n/a	n/a	n/a
Other	5%	2%	4%	8%	6%	-	7%	4%
Not Sure / Decline To Answer	4%	-	-	3%	4%	1%	2%	-

## APPENDIX A CHINA: INITIAL THOUGHTS OF THE UNITED STATES

	GENERAL PUBLIC		BUSINESS LEADERS		OPINION LEADERS	
	FREQUENCY	%	FREQUENCY	%	FREQUENCY	%
President	192	5.1	12	7.4	23	10.6
Landmark Buildings and Cities (White House, Statue of Liberty, Times Square, New York)	199	5.3	24	14.8	22	10.2
Hegemonism	143	3.8	5	3.1	11	5.1
Superpower	127	3.4	6	3.7	2	0.9
American Spirit (Freedom / Democracy / Civilized)	36	1.0	7	4.3	17	7.9
Economic Development	210	5.6	7	4.3	1	0.5
Sino-US Relations / Non-Government Exchange Between China and US	55	1.5	7	4.3	2	0.9
Improved Politics/System	11	0.3	4	2.5	11	5.1
Fast-Food	38	1.0	0	0	3	1.4
Social Welfare	3	0.1	0	0	2	0.9
War and Military	402	10.6	17	10.5	21	9.7
American Debt	9	0.2	2	1.2	1	0.5
Fashion and Culture	204	5.4	6	3.7	10	4.6
Advanced Technology	72	1.9	3	1.9	2	0.9
Nationality	24	0.6	0	0	0	0
Dollar	30	0.8	2	1.2	0	0
American Product (Iphone, Cars)	66	1.7	8	4.9	0	0
Price and Consume	5	0.1	1	0.6	0	0
Sports	58	1.5	2	1.2	1	0.5
Climate/Geography Environment	46	1.2	5	3.1	9	4.2
Human Right	18	0.5	0	0	0	0
Anti-Terrorist / 911 Terrorist Attacks	374	9.9	27	16.7	26	12.0
International Trade	12	0.3	1	0.6	1	0.5
Public Security / Social Conduct	38	1.0	2	1.2	11	5.1
Education	14	0.4	1	0.6	5	2.3
Tourism	6	0.2	1	0.6	2	0.9
Economic/Financial Crisis	88	2.3	5	3.1	21	9.7
Negative Feeling (Angry)	33	0.9	0	0	2	0.9
Positive Feelings (Good, Beautiful)	6	0.2	0	0	1	0.5
Refused	104	2.7	4	2.5	1	0.5
Not Sure	1,153	30.5	3	1.9	8	3.7

## APPENDIX B UNITED STATES: TOP ISSUES

	2012				2007			
	GENERAL PUBLIC (N=1000)	BUSINESS LEADERS (N=120)	OPINION LEADERS (N=244)	POLICYMAKERS (N=36)	GENERAL PUBLIC	BUSINESS LEADERS	OPINION LEADERS	POLICYMAKERS
Jobs and the Economy	71%	73%	75%	81%	41%	49%	45%	36%
Politics / Government / Campaign Finance Reform	30%	38%	38%	22%	17%	19%	15%	4%
Government Budget / Spending / Deficit	25%	40%	39%	39%	10%	7%	8%	22%
War / Peace / Foreign Policy	22%	9%	18%	28%	51%	44%	47%	45%
Health Care / Insurance / Prescription Drugs	15%	16%	10%	3%	22%	26%	31%	29%
Education / Schools	11%	23%	18%	22%	12%	13%	19%	20%
Welfare / Child Care/Homelessness / Housing / Poverty	10%	8%	7%	8%	8%	4%	4%	2%
Utility Rates / Gas Prices / Energy Consumption	10%	11%	12%	6%	15%	14%	9%	16%
Morality / Values	9%	8%	5%	6%	10%	10%	11%	6%
Environment	7%	10%	12%	14%	11%	13%	15%	11%
National Security	7%	9%	5%	8%	5%	14%	9%	31%
Income Inequality	5%	8%	10%	6%	2%	2%	2%	6%
Immigration	4%	3%	3%	3%	21%	21%	21%	22%
Terrorism	4%	2%	5%	6%	15%	21%	16%	30%
Social Security / Elderly	4%	1%	1%	-	3%	6%	3%	6%
Crime / Drugs / Violence / Gun Control	3%	1%	1%	3%	4%	10%	4%	-
Abortion	1%	-	-	-	2%	-	1%	1%
Racism	1%	-	*	-	3%	1%	2%	2%
Aids and Other Infection Diseases	-	-	-	3%	*	3%	1%	-
Other	40%	38%	38%	44%	13%	3%	14%	2%
Not Sure / None	6%	-	*	-	2%	1%	2%	-
Decline to Answer	1%	-	*	-	n/a	n/a	n/a	n/a



## APPENDIX B CHINA: TOP ISSUES

	GENERAL PUBLIC		BUSINESS LEADERS		OPINION LEADERS	
	FREQUENCY	%	FREQUENCY	%	FREQUENCY	%
Jobs and the Economy	1052	27.9	36	22.2	43	19.9
Education / Schools	631	16.7	26	16.0	59	27.3
Health Care / Insurance	692	18.3	14	8.6	15	6.9
Crime / Drugs / Violence	534	14.2	1	0.6	1	0.5
Terrorism	208	5.5	2	1.2	6	2.8
Security	234	6.2	7	4.3	21	9.7
Welfare / Child Care / Homelessness	405	10.7	16	9.9	36	16.7
Social Security / Elderly / Poverty	718	19.0	18	11.1	54	25.0
Environment	505	13.4	37	22.8	12	5.6
Energy Consumption	329	8.7	11	6.8	66	30.6
Morality / Values	335	8.9	36	22.2	84	38.9
Corruption	1,609	42.6	44	27.2	3	1.4
Taiwan	430	11.4	6	3.7	83	38.4
Hiv/Aids and other Epidemic Diseases	183	4.8	56	34.6	24	11.1
Income Inequality	1,053	27.9	2	1.2	4	1.9
Family Planning / Sex Ratio at Birth	304	8.1	19	11.7	46	21.3
Social Unrest	214	5.7	1	0.6	8	3.7
Lack of Legitimate Rights of Migrant Workers from Rural China in Coastal Cities	414	11.0	31	19.1	12	5.6
Inadequate Rule of Law	210	5.6	12	7.4	17	7.9
Fragile Financial System	106	2.8	20	12.3	43	19.9
High Housing Price	686	18.2	27	16.7	59	27.3
Inflation	378	10.0	36	22.2	15	6.9
Food Safety	2	0.1	2	1.2	3	1.4
Living Level	2	0.0	0	0	0	0
Contradiction between the Central Government and Local Governments	0	0	3	1.9	0	0
Unbalanced Regional Development	0	0	3	1.9	1	0.5
Country Image	0	0	2	1.2	1	0.5
Human Rights	0	0	2	1.2	3	1.4
Political System	0	0	9	5.6	21	9.7
The Process of Democratization	0	0	0	0	2	0.9
Press Not Free	0	0	0	0	2	0.9
Underdeveloped Science and Technology	0	0	0	0	2	0.9
Talents	0	0	0	0	1	0.5
Social Policy	0	0	1	0.6	0	0
Only One or Two Items	50	1.3	29	17.9	11	5.1
None	1	0.0	0	0	0	0
Refused	0	0	2	1.2	1	0.5
Not Sure	8	0.2	0	0	0	0

## APPENDIX C UNITED STATES: RESPONDENT PROFILE

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

	GENERAL PUBLIC (N=1000)	BUSINESS LEADERS (N=120)	OPINION LEADERS (N=244)	POLICYMAKERS (N=36)
<b>GENDER</b>				
Male	49%	80%	75%	69%
Female	51%	20%	25%	31%
<b>AGE</b>				
18-34	31%	4%	10%	42%
35-49	26%	23%	25%	25%
50-64	26%	62%	54%	28%
65+	17%	9%	11%	-
Mean	46	54.1	52.1	41.1
<b>ETHNICITY</b>				
White	68%	93%	86%	81%
Black/African American	12%	2%	6%	6%
Hispanic	14%	6%	2%	6%
Asian	3%	3%	2%	6%
Hawaiian	-	-	*	-
Native American	2%	-	1%	*
Two or More Races	10%	2%	3%	3%
<b>POLITICAL AFFILIATION</b>				
Republican	23%	36%	23%	28%
Democrat	34%	28%	41%	25%
Independent	29%	30%	33%	33%
<b>EDUCATION</b>				
High School or Less	41%	3%	-	-
College Graduate	46%	29%	30%	44%
Post Graduate	12%	68%	70%	56%
<b>UNION MEMBER</b>				
Yes	16%	4%	12%	11%
No	84%	96%	88%	86%

## APPENDIX C CHINA: RESPONDENT PROFILE

	BEFORE WEIGHTING %	AFTER WEIGHTING %
<b>GENDER</b>		
Male	80%	69%
Female	20%	31%
<b>AGE</b>		
18-29	38.5	35.9
30-39	22.9	22.8
40-49	24.2	25.5
50-60	14.4	15.8
<b>EDUCATION DEGREE OF GENERAL PUBLIC</b>		
Low Level of Education (Elementary School And Below)	13.5	21.5
Medium Level of Education (Junior High School and High School / Technical High School)	55.0	55.9
High Level of Education (Technical School and Above)	29.6	20.3
Refused	1.1	1.4
Not Sure	0.7	0.9
<b>NATIONALITY OF GENERAL PUBLIC</b>		
Han	96.4	96.5
Ethnic Minorities	3.1	3.0
Refused	0.3	0.2
Not sure	0.2	0.3
<b>RELIGIOUS BELIEF OF GENERAL PUBLIC</b>		
Have Religious Belief	19.8	23.9
No Affiliation	78.6	74.3
Refused	0.7	0.7
Not Sure	0.9	1.1
<b>MARITAL STATUS OF GENERAL PUBLIC</b>		
Married Now	68.6	70.9
Widowed	1.2	1.4
Divorced/Separated	1.3	0.9
Never Married, Live Alone	10.2	8.1
Never Married, Live with Somebody	14.3	13.3
Refused	2.2	2.4
Not Sure	2.2	3.0
<b>PROFESSION OF GENERAL PUBLIC IN CITIES AND TOWNS</b>		
Personnel in Government and Non-Corporate Institutions	9.8	9.4
Senior and Medium Management in Enterprises	5.2	5.2
White-Collars	21.1	22.4

	BEFORE WEIGHTING %	AFTER WEIGHTING %
Blue-Collars	29.9	29.1
Others	8.6	8.9
Farmers	1.1	1.0
Sole Proprietors (Self-Employed)	18.8	18.4
Students	4.2	4.4
Refused	0.1	0.1
Not Sure	1.1	1.0
<b>PROFESSIONS OF GENERAL PUBLIC IN RURAL AREAS</b>		
Farming	38.9	38.2
Cattle Breeding and Aquaculture	1.7	1.7
Run a Company	0.5	0.5
Stable Job (Full-Time Job in Local Village, Local Town or Other Areas)	12.5	13.2
Self-Employed	14.0	14.7
Unstable Job (Part-Time Job In Local Town or Other Areas)	17.4	17.5
Jobless, Rely on Relatives or Government	6.1	6.0
Other	1.6	1.7
Refused	2.4	2.0
Not Sure	4.9	4.5
<b>FAMILY INCOME OF GENERAL PUBLIC IN CITIES AND SMALL TOWNS IN PREVIOUS MONTH</b>		
Low Income (Less than 4000 Yuan)	51.1	47.8
Medium Income (4001-8000 Yuan)	31.2	33.2
High Income (More than 8001 Yuan)	15.2	16.8
No Income	0.6	0.6
No Regular Income	0.5	0.4
Refused	0.7	0.6
Not Sure	0.7	0.6
<b>FAMILY INCOME OF GENERAL PUBLIC IN RURAL AREAS IN PREVIOUS MONTH</b>		
Low Income (Less than 1500 Yuan)	42.5	43.2
Medium Income (1501-3000 Yuan)	36.4	36.6
High Income (More than 3001 Yuan)	10.9	11.3
No Income	0.4	0.4
No Regular Income	3.3	2.8
Refused	2.7	2.5
Not Sure	4.0	3.4

## APPENDIX C CHINA: RESPONDENT PROFILE CONT'

	BEFORE WEIGHTING %	AFTER WEIGHTING %
<b>POLITICAL STATUS OF GENERAL PUBLIC</b>		
Party Member	8.4	5.4
Not a Party Member	88.4	91.4
Refused	1.9	1.6
Not Sure	1.3	1.6
<b>CODE OF EXECUTIVE CITIES AND TOWNS</b>		
Beijing	4.7	9.7
Shanghai	4.6	11.1
Guangzhou	5.0	5.4
Shantou	4.7	4.2
Hangzhou	4.8	3.6
Shenyang	5.0	4.3
Changchun	4.7	3.0
Wuhan	4.8	4.3
Xiangyang	4.8	1.9
Chengdu	5.4	4.3
Lanzhou	5.0	1.8
Baotou	4.8	1.2
Puning, Jieyang, Guangdong	3.6	5.7
Cangshan, Linyi, Shandong	3.4	3.1
Donghai, Lanyugang, Jiangsu	3.3	2.9
Funan, Fuyang, Anhui	3.3	4.2
Dancheng, Zhoukou, Henan	3.4	3.4
Xinhua, Loudi, Hunan	3.6	3.4
Fengcheng, Yichun, Jiangxi	3.4	3.4
Xuanwei, Qujing, Yunnan	3.4	3.7
Lingshan, Qinzhou, Guangxi	3.5	3.8
Guiping, Guigang, Guangxi	3.5	3.8
Santai, Mianyang, Sichuan	3.6	4.5
Bijie, Anshun, Guizhou	3.6	3.5