

# Annual Survey on Chinese Public Opinion of the U.S.

Research Center for Contemporary China, Peking University  
July 2019

# Methodology

- Census-representative sample of adults 18+ in urban communities of prefecture or higher level cities in mainland China for at least one year.
- n=3,216 completes
- Survey fielded from June 10-July 3, 2019
- Messages supporting China-U.S. cooperation and positive actions the U.S has taken or could take were tested using Prime Group's M3 methodology

# Key Findings

## 1 of 3

- Despite all of the developments in and news surrounding China-U.S. relations, Chinese's opinion of the U.S. has remained middle-ranking. However, of the seven countries tested only Japan and India had lower favorable ratings.
- President Trump is viewed favorably by just 17% of Chinese, the same rating given to Indian Prime Minister Narendra Modi. However, 63% view Trump unfavorably compared while just 33% view Modi unfavorably. 20% of Chinese are either neutral or unable to rate Trump.
- Most of Chinese view U.S. as having a strong military (79%), being aggressive (77%), and being innovative (67%). Just about one-in-ten see U.S. as peaceful (12%) or a friend of China (14%).
- Just 20% of Chinese say the U.S. leaders can be trusted in their dealings with China, slightly increased since 2015 (9%). About half (52%) say the U.S. leaders cannot be trusted. The rest are neutral or unsure.
- 14% of Chinese rate the relationship between China and the U.S. positively while 56% rate it negatively. 51% expect that relationship to improve over the next ten years while 22% think it will worsen.
- Of ten issues concerning the U.S. Chinese are most familiar with trade friction with the U.S. (79%), cybersecurity disputes with the U.S. (67%), top leaders meeting of North Korea and the U.S. (62%), and gun rights disputes in the U.S.(59%).

# Key Findings

## 2 of 3

- Of the ten issues tested Chinese are most concerned with trade friction with the U.S. (77% list it in the top three), cybersecurity disputes with the U.S. (65%) and political polarization in the U.S. (23%).
- Chinese think the U.S. is more responsible for the current trade tensions than China with 80% blaming the U.S., 3% blaming China and 13% blaming both equally.
- More than Half of Chinese (65%) believe that trade friction between China and the U.S. is having a negative impact on the global economy.
- Most Chinese believe that China and the U.S. will benefit equally from increased trade (34%) or are unsure who will benefit more (17%).
- About half of Chinese (54%) think China should engage and cooperate with the U.S while 40% think China should try to limit U.S. global influence and 6% are not sure.
- Over half of Chinese (65%) think the recent imposition of tariffs between China and the U.S. is having a negative effect on their trading relationship.
- Most Chinese (69%) believe that China-U.S. educational and technological cooperation should be increased (60%) or maintained at current levels (9%) while 19% think it should be reduced. The rest are unsure.

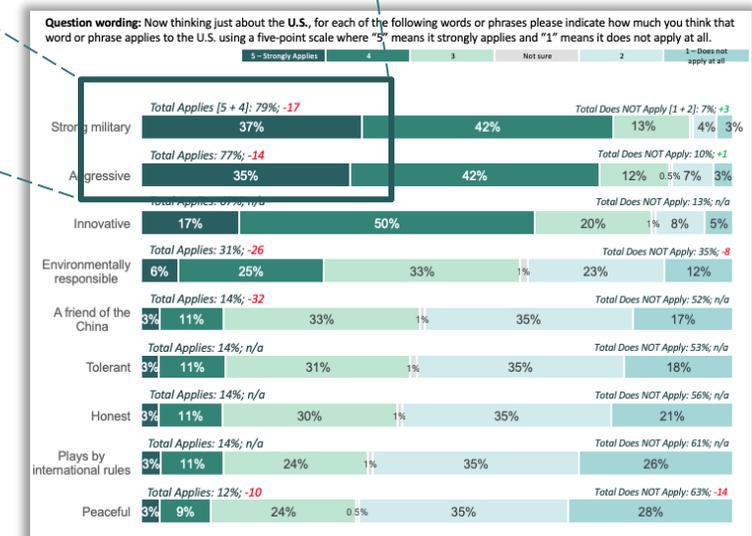
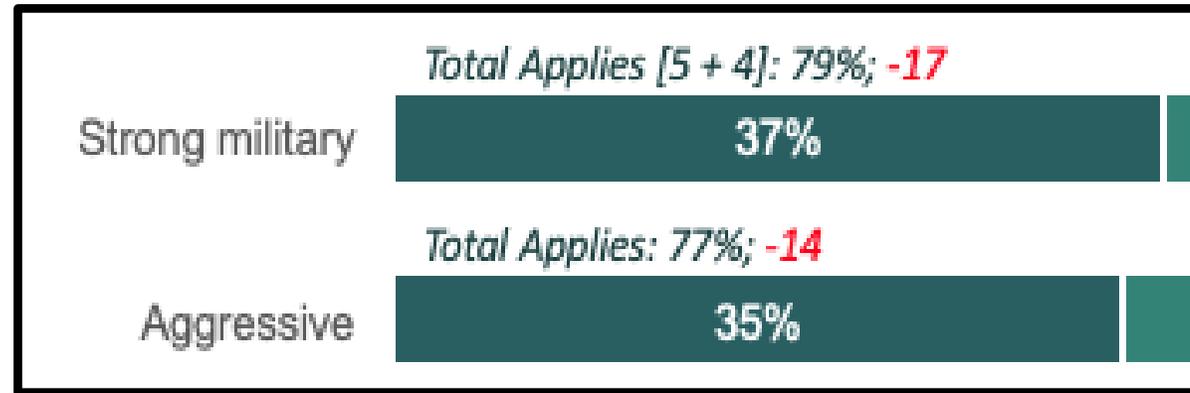
# Key Findings

## 3 of 3

- Most Chinese (87%) approve of Chinese government's handling of relations with the U.S. than disapprove (9%).
- More Chinese (40%) think U.S. economic growth is good for China than think it is harmful (24%) while one-third (36%) take a neutral position.
- Chinese are divided on whether U.S. and China interests will lead to cooperation (67%) or to conflict (28%) with 5% unsure. There are more Chinese (10%) saying cooperation than conflict compared with 2015.
- The strongest messages in support of China-U.S. cooperation are:
  - The countries have more to gain from cooperation than from conflict;
  - Encouraging China to continue its modernization of the economic system ;
  - Providing an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.
- Chinese identify the most positive actions U.S. has taken or could take as:
  - Cooperating with China on political, economic, environmental and cultural issues;
  - Investing in science and technology leading to important breakthroughs;
  - Making significant contributions to global economic growth and stability.

On most slides, data are presented in a bar chart format as seen below.

- The bar displays every answer category for each question or data point.
- The italics above the bar show the aggregate data for the top two answer categories; in this example it displays the Total of Very Favorable + Somewhat Favorable for each country rated.
- If the question or data point was also in the 2015 survey, the colored number to the right shows the change since 2015. Where the data have increased or stayed the same the number is shown in green, and where the data have decreased the number is shown in red.

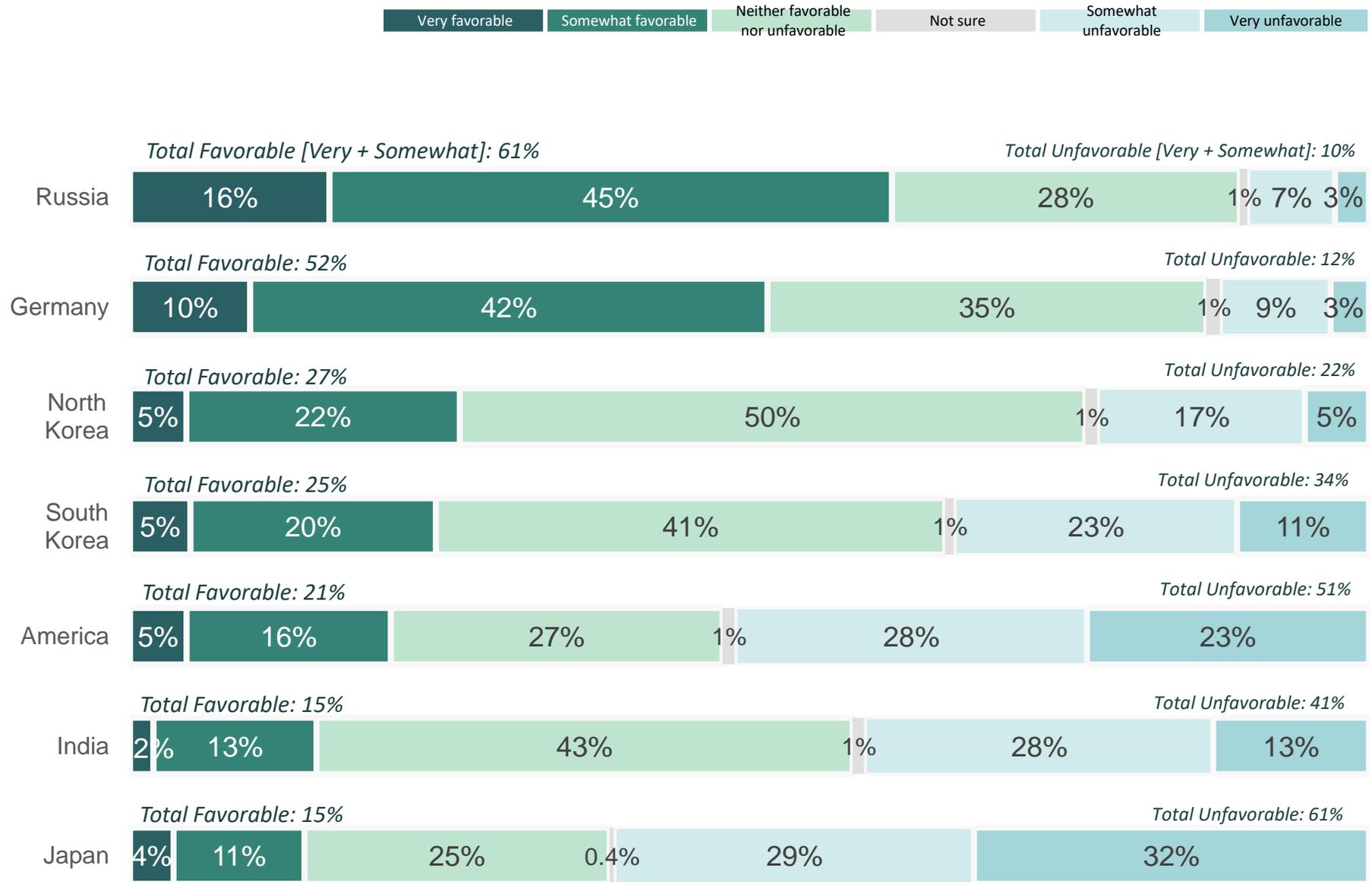


# How to Use this Report

# Country Favorability Ratings

Comment: U.S. rating is almost two point five times as unfavorable (51%) as favorable (21%).

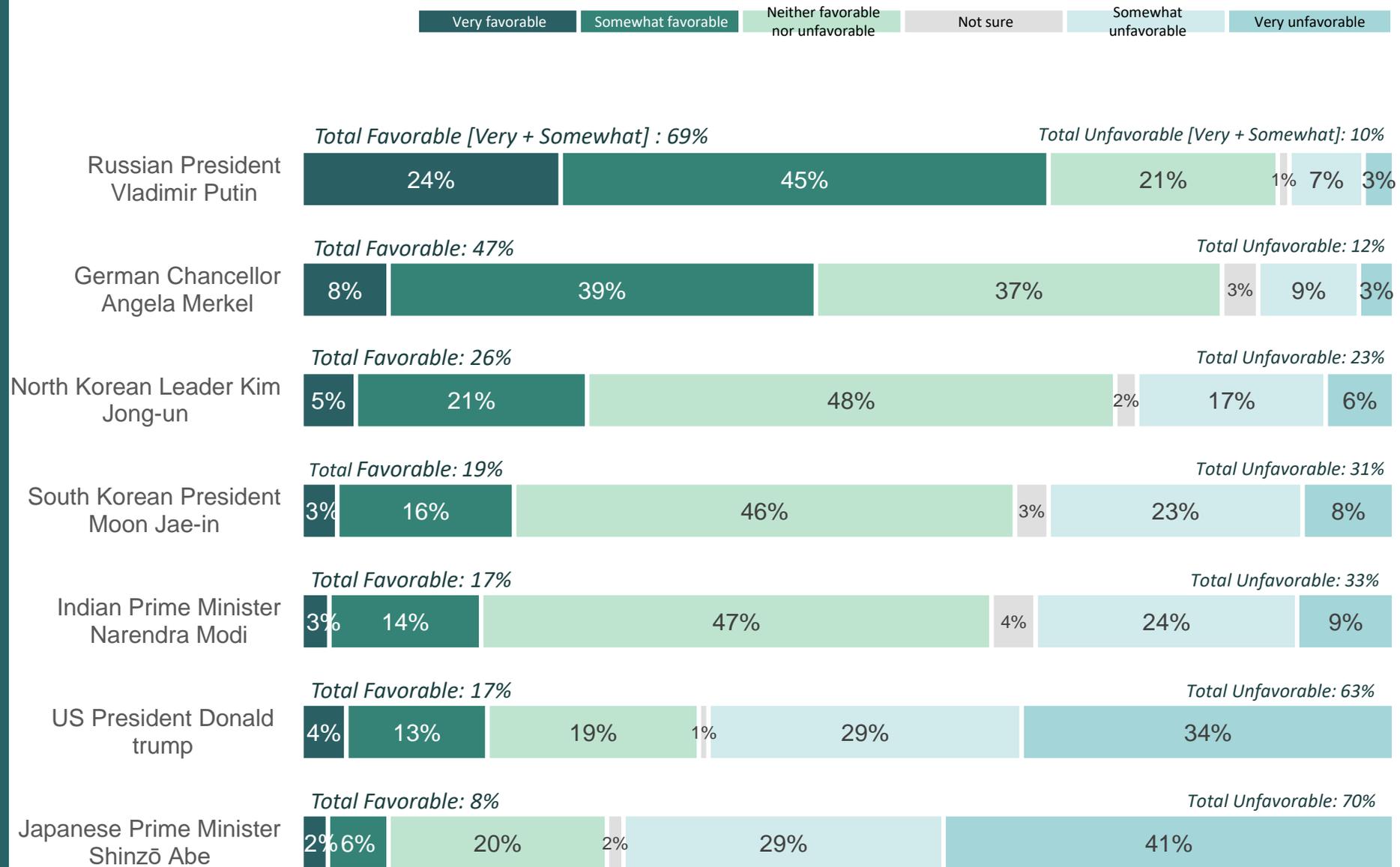
**Question wording:** Please indicate for each of the following countries if you have a favorable or unfavorable opinion of that country?



# Country Leader Favorability Ratings

Comment: 20% of Chinese are neutral or unsure about rating President Trump but his unfavorable rating (63%) is about four times his favorable rating (17%).

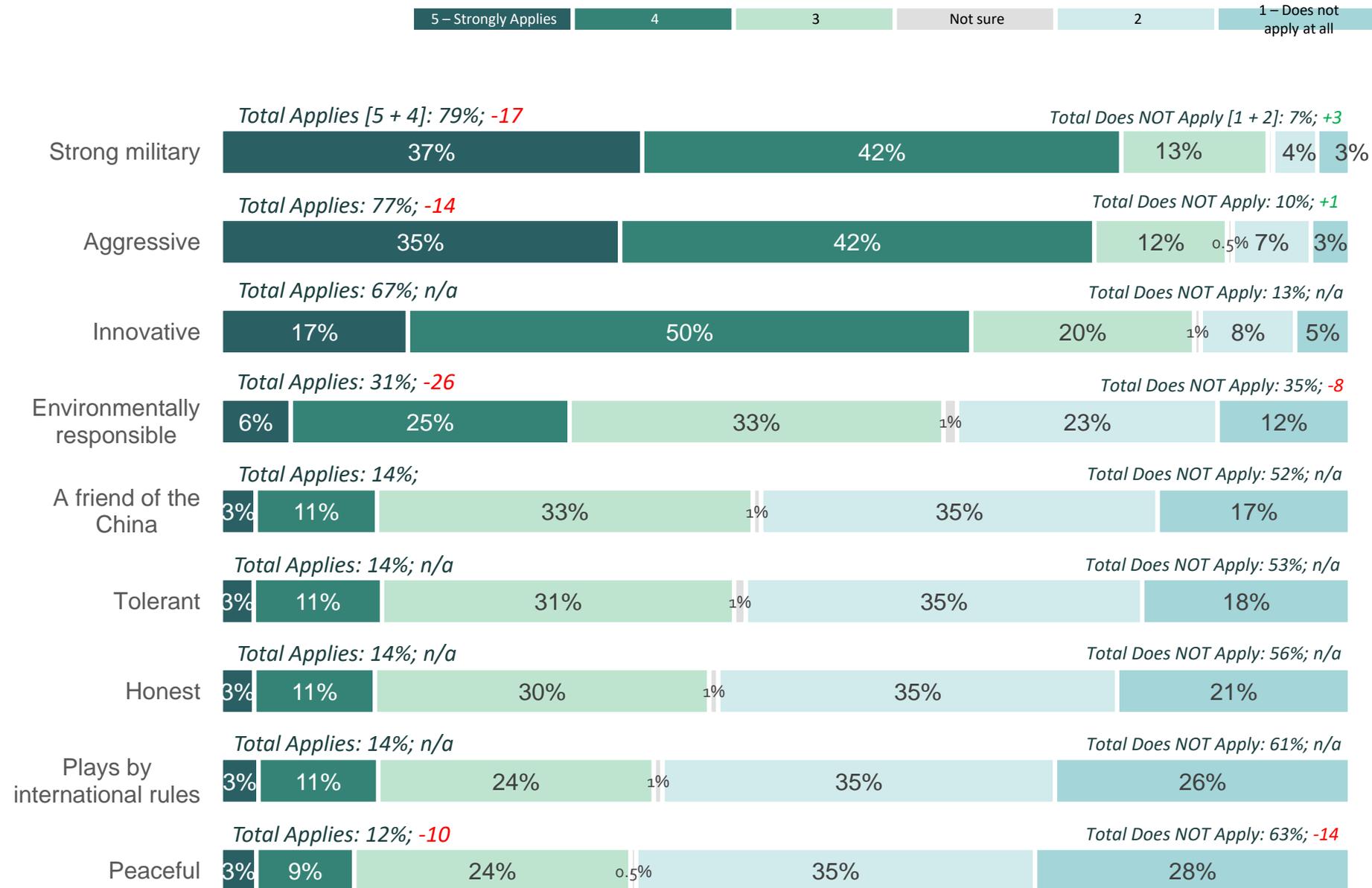
**Question wording:** Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?



# Perceived Attributes of U.S.

Comment: Strong military (neutral?), Aggressive (negative?), and Innovative (positive?) are the three traits most associated with U.S. (of those tested). Honest, Plays by international rules, and Peaceful are the least associated traits.

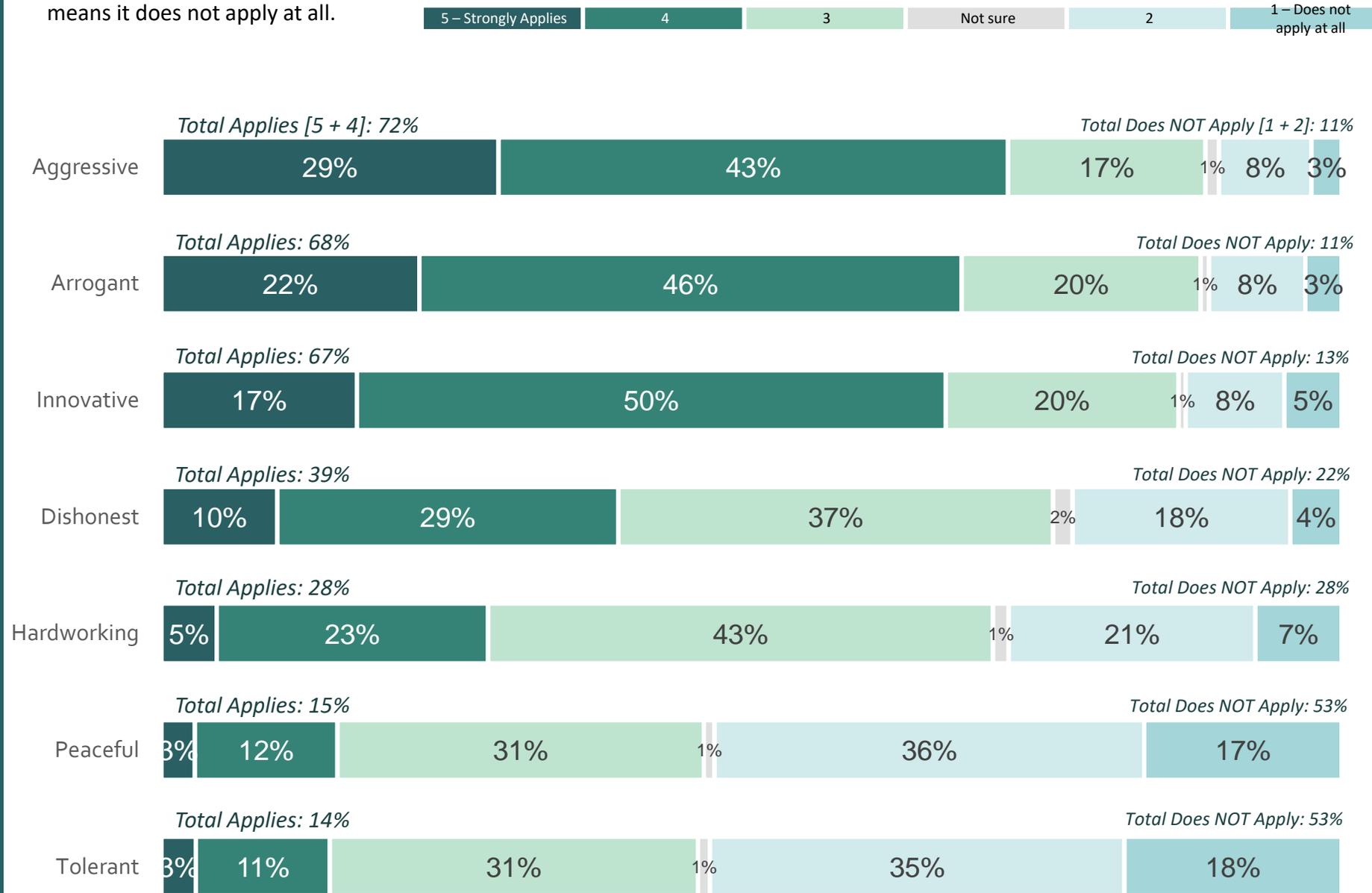
**Question wording:** Now thinking just about the **U.S.**, for each of the following words or phrases please indicate how much you think that word or phrase applies to the U.S. using a five-point scale where "5" means it strongly applies and "1" means it does not apply at all.



# Perceived Attributes of the American People

Comment: The American people are seen as aggressive, arrogant, and innovative by between about two-thirds and three-fourth of Chinese. Most Chinese do not think the American people are tolerant, peaceful, or hardworking.

**Question wording:** Now thinking just about the **American people**, for each of the following words or phrases please indicate how much you think that word or phrase applies to the American people using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.



**Question wording:** How familiar are you with the U.S. position on the Korean nuclear issue?

Very familiar

Somewhat familiar

Not very familiar

Not at all familiar

Never heard

# The U.S. Position on the Korean Nuclear Issue

Comment: Over half of Chinese is familiar with the U.S. position on the Korean nuclear issue.

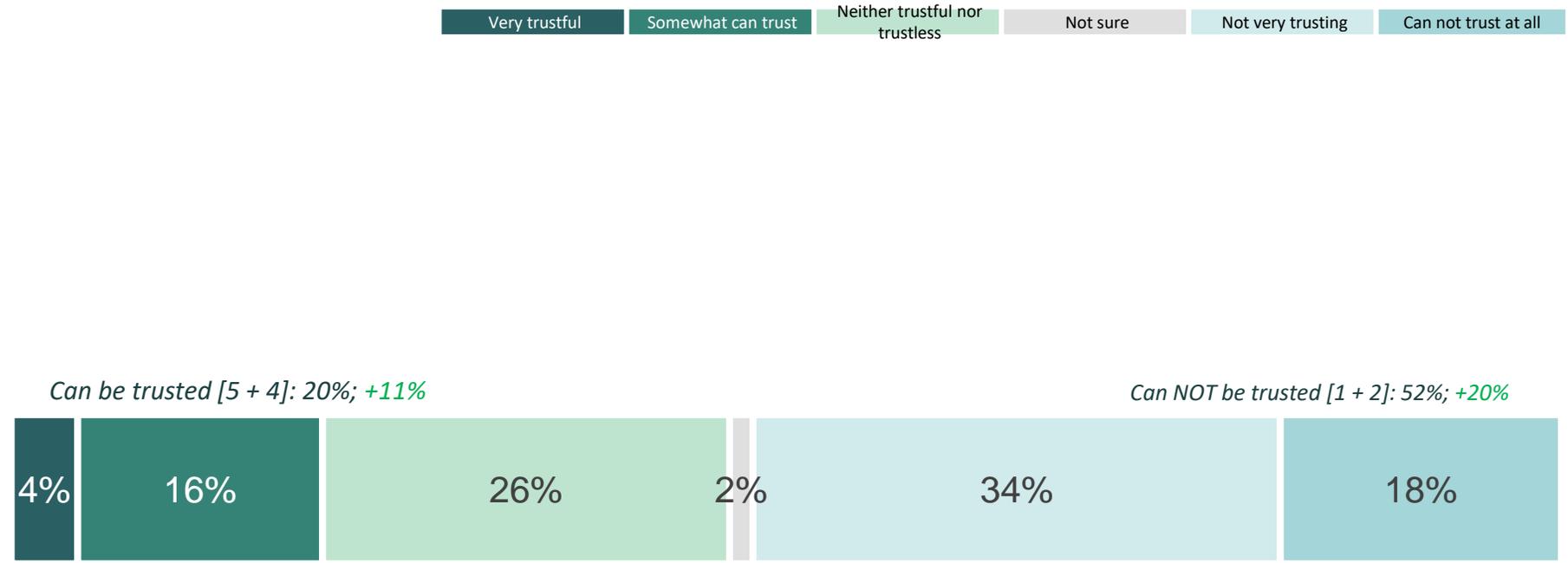
*Total Familiar [Very + Somewhat]: 58%*



# Can the leadership of U.S. be trusted?

Comment: Chinese's trust in U.S. in their dealings with China has slightly increased since 2015 but still just 20% thinking the country is trustworthy.

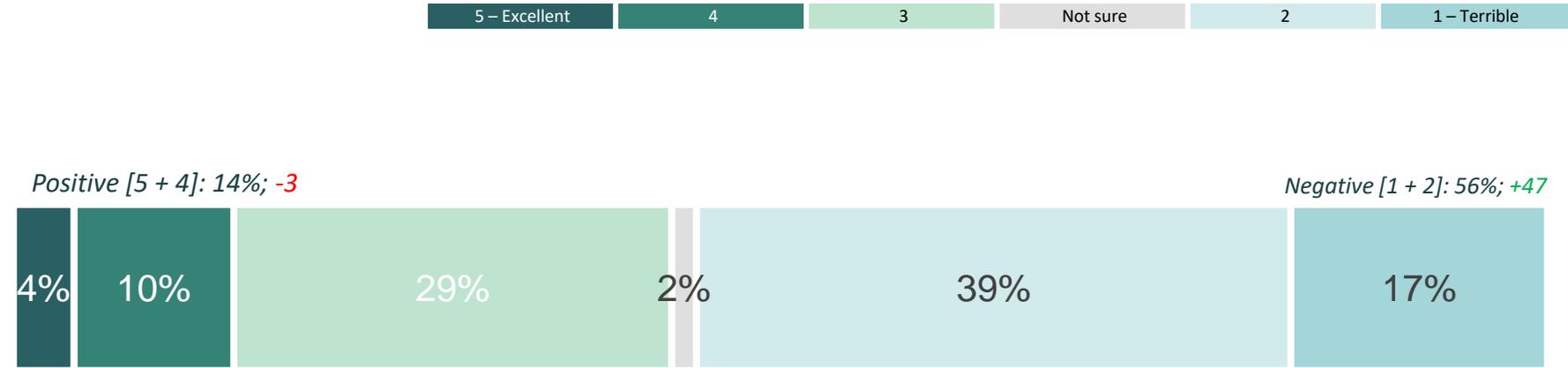
**Question wording:** How much do you think the leadership of U.S. can be trusted in their dealings with China using a five-point scale where 5 is a great deal and 1 is not at all?



# China-U.S. Relationship Now and In the Future

Comment: Chinese's view of the China-U.S. relationship is largely more negative than it was in 2015 while their expectations for change in that relationship is somewhat more negative.

**Question wording:** How would you rate the relationship between China and the U.S. on a five-point scale where "5" is excellent and "1" is terrible?



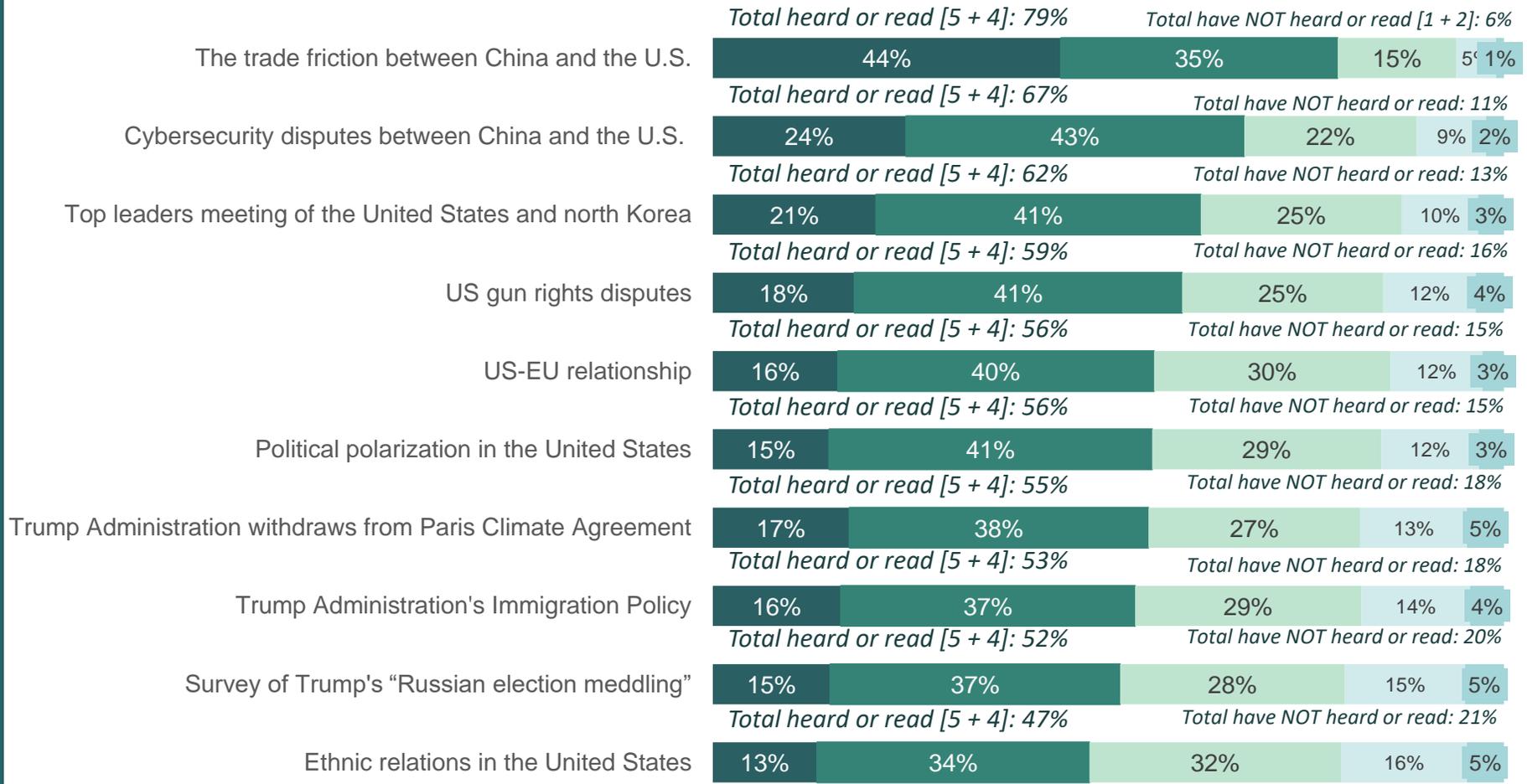
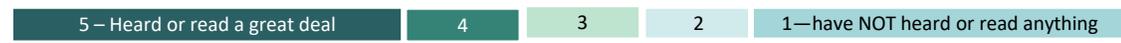
**Question wording:** Over the next ten years do you think the relationship between the U.S. and China will get better or worse or stay the same?



# Familiarity with Issues Concerning the U.S.

Comment: Trade friction between China and the U.S. is the only issue (of ten tested) that has over three-fourth Chinese very or somewhat familiar with it. Most of the issues have over half Chinese familiar with them.

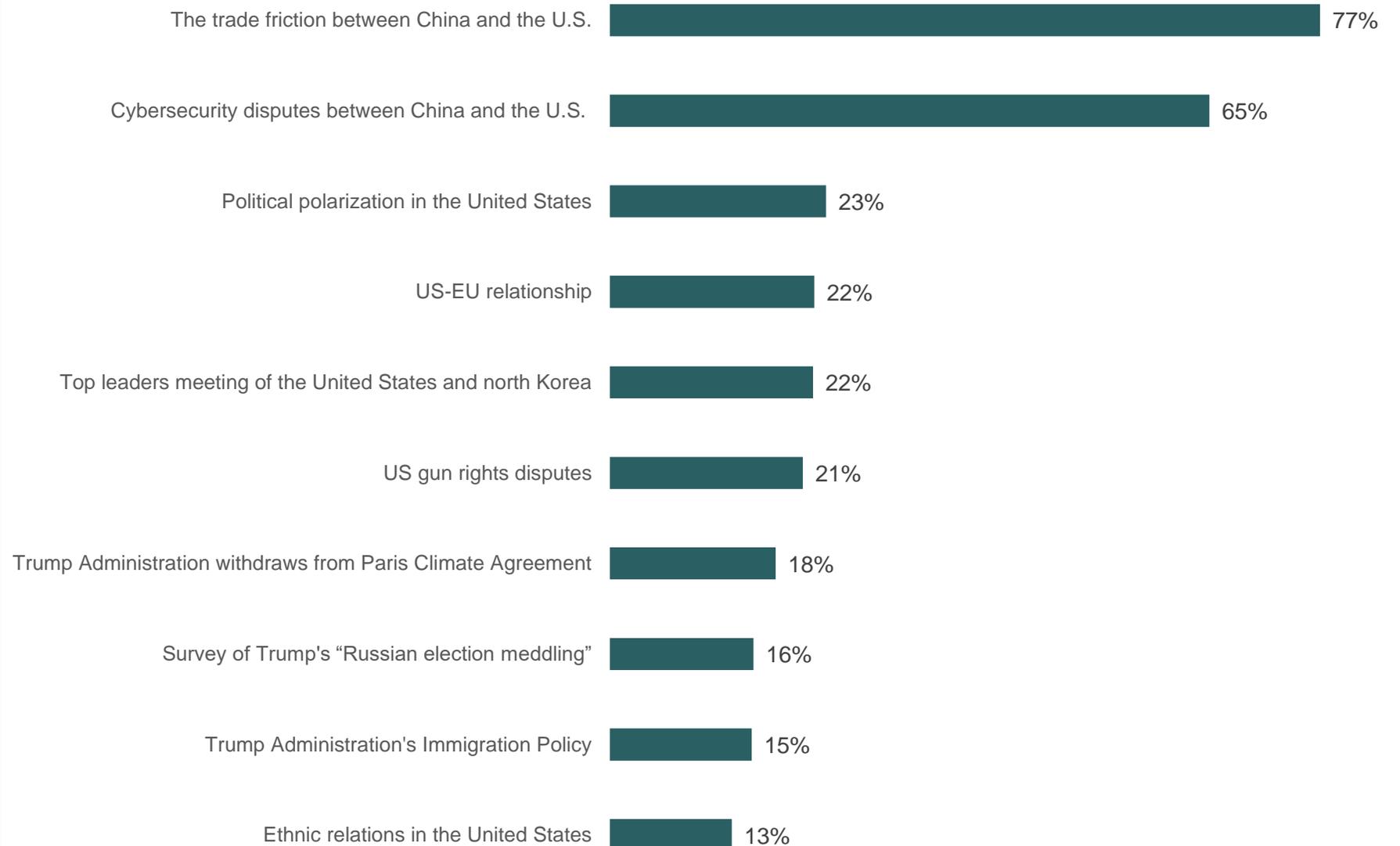
**Question wording:** For each of the following issues concerning U.S. please indicate how much you have heard or read about that issue using a five-point scale where “5” means you have heard or read a great deal and “1” means you have not heard or read anything at all.



# Concern with Issues about the U.S.

Comment: Trade friction, cyber security disputes, and political polarization in the United States are the issues of greatest concern to Chinese (among those tested).

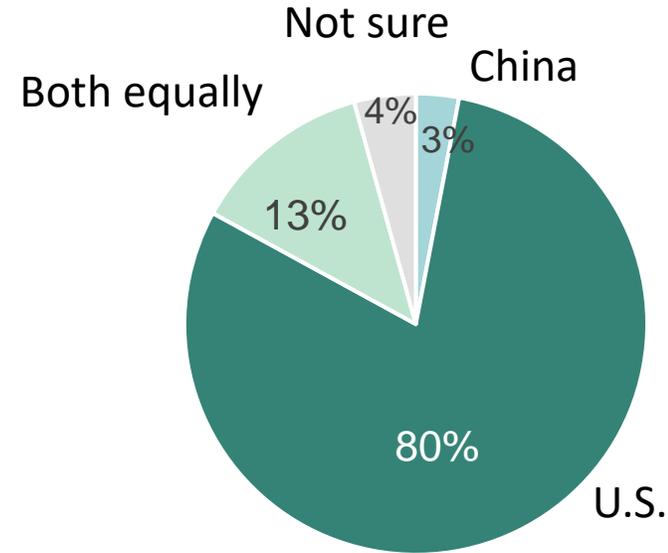
Question wording: Of the following issues which THREE cause you the greatest concern? % selecting



# China-U.S. Trade Tensions

Comment: Chinese think the U.S. is more responsible for the current trade tensions than China and more than half think those tensions are having a negative impact on the global economy.

**Question wording:** Who do you think is more responsible for the trade tensions between China and the U.S.?

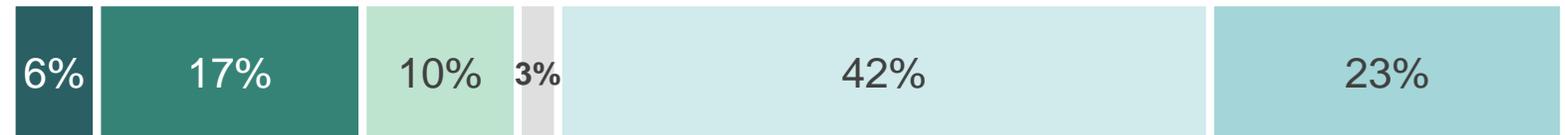


**Question wording:** Do you think that the current trade friction between China and the U.S. is having a positive or negative impact on the global economy?



Positive [Very + Somewhat]: 23%

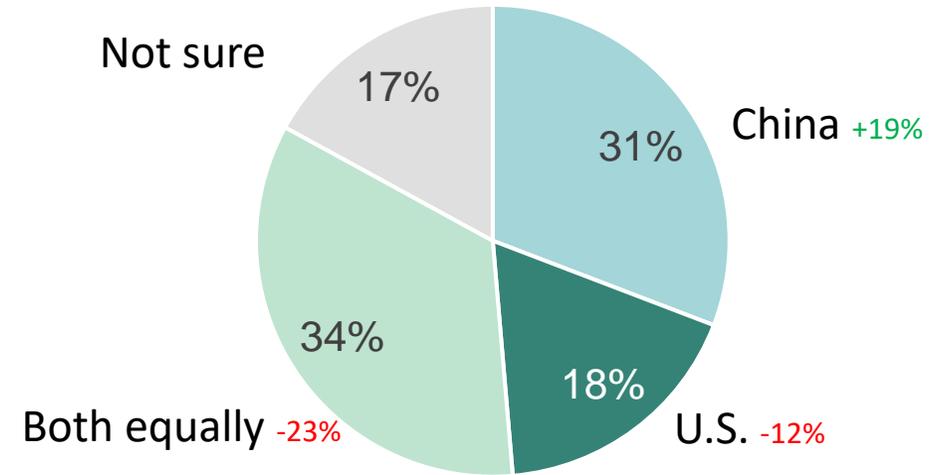
Negative [Very + Somewhat]: 65%



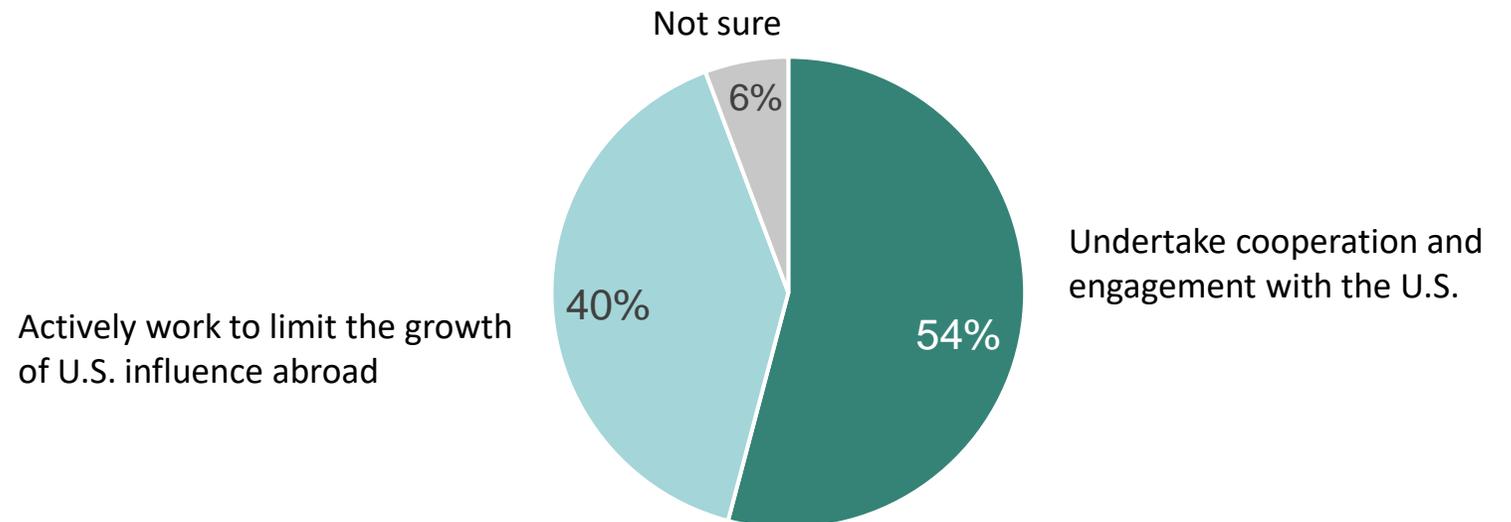
# China-U.S. Trade Relations

Comment: Chinese are evenly divided on whether China benefit more (31%) or the U.S. benefit more (18%) from increased trade. More think China should engage and cooperate with the U.S. than think it should try to limit U.S. global influence.

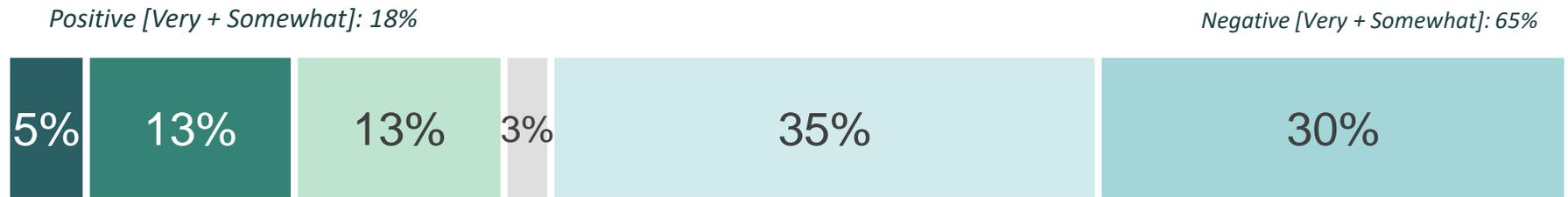
**Question wording:** Who will benefit more from increased China-U.S. trade?



**Question wording:** When dealing with the expansion of US national interests overseas, what do you think China should choose between the following two strategies?



**Question wording:** Do you think the tariffs on imported goods imposed first by the US and then by China are having a positive or a negative effect on the trading relationship between the two countries?



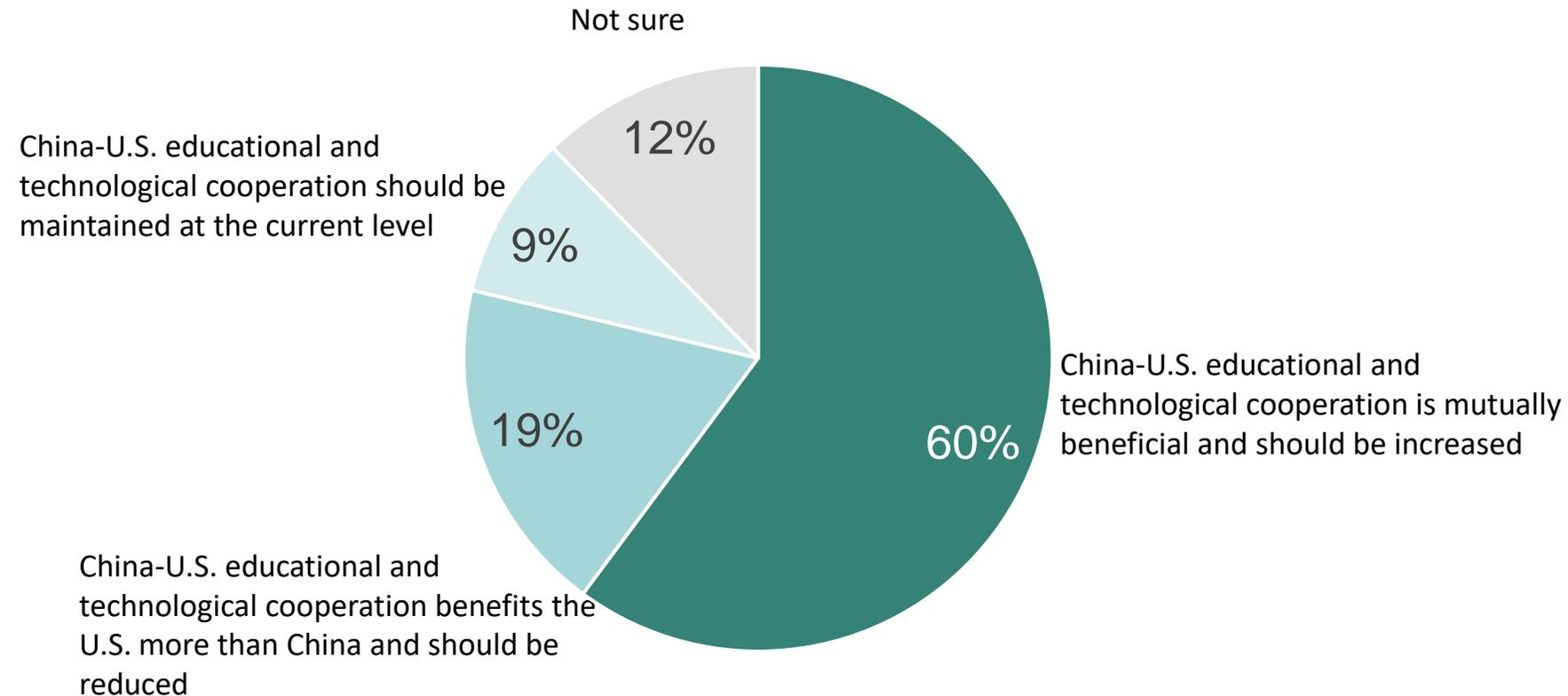
# Impact of Tariffs

Comment:  
Overwhelmingly (65% to 18%) Chinese think the current round of bilateral tariffs is negatively affecting the trading relationship between the two countries.

# China-U.S. Educational and Technological Cooperation

Comment: Chinese are evenly divided on whether educational and technological cooperation should be increased (60%) / kept the same (9%) or whether it should be reduced (19%).

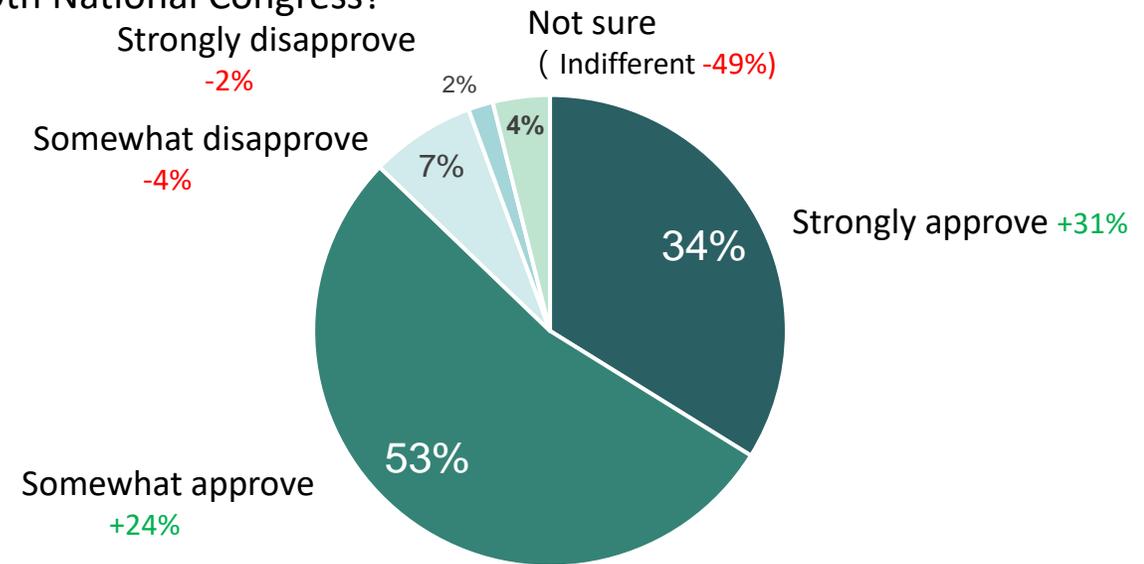
**Question wording:** China-U.S. educational and technological cooperation has been negatively affected by the recent tensions between the two countries. Which of the following statements is closest to your own opinion?



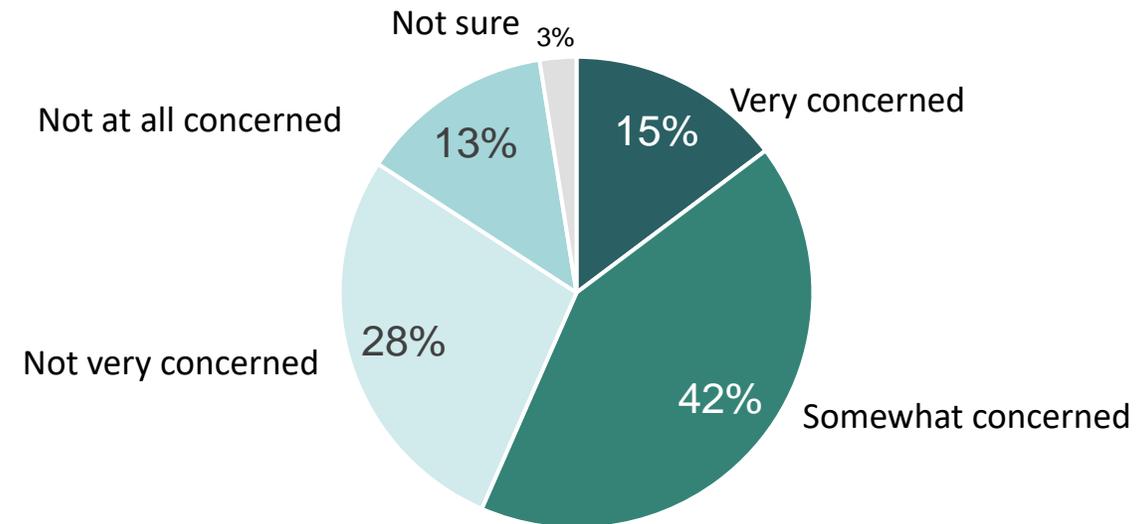
# China-U.S. Relations and China Politics

Comment: More Chinese approve of the Chinese government's handling of China-U.S. relations (87%) than disapprove (9%). Around 2/3 (57%) say they are concerned about U.S. influence in China domestic politics.

**Question wording:** Do you agree with the work done by the Chinese government in handling China-US relations since the 19th National Congress?



**Question wording:** Are you concerned about the U.S. influence in China domestic politics, or not?

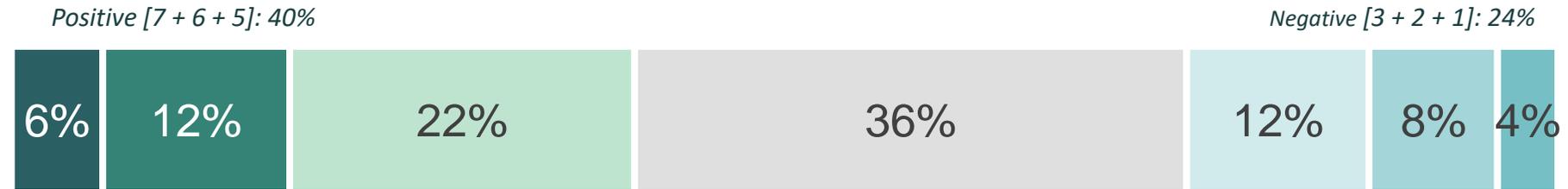


Question wording: Overall, do you think that the U.S. economic growth is:



# Impact of U.S. Economic Growth on China

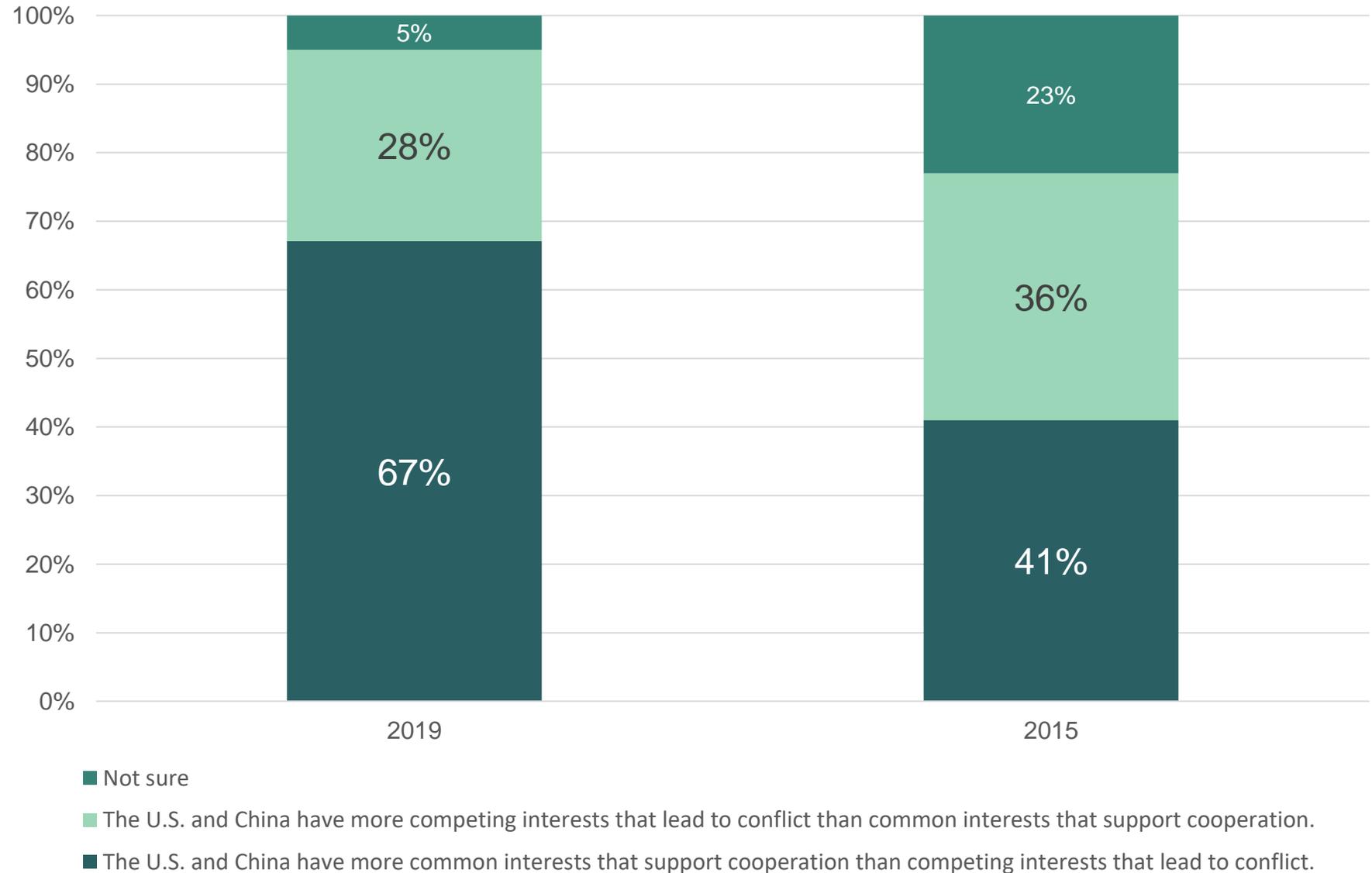
Comment: More Chinese see U.S. economic growth as positive for China (40%) than as negative (24%).



# China-U.S. Interests

Comment: Views on whether Chinese and U.S. interests will lead to cooperation or conflict are changed since 2015 with slightly more Chinese saying cooperation than conflict.

Question wording: Which of the following views is closer to your own?



# M3 Message Testing

# M3 Message Testing: Overview

- We tested 10 messages using Prime Group's M3 methodology.
- M3 testing is a forced choice methodology requiring respondents to react to a series of screens, each with four messages.
- Respondents are asked to choose the strongest and the weakest message on each screen. Each message is repeated multiple times but always with a different set of "competing" messages.
- With this sample size (n=3,216) this methodology produces more than 128,640 unique data points, resulting in much greater precision and differentiation than traditional rating exercises which rely on each message being rated independently.

# M3 Message Testing: Sample Screen

在接下来的8个屏幕上，您将看到美国已经采取，可能已经采取的或即将采取的一些行动。请仔细阅读然后选择：

- 最能**正面**影响您对美国看法的一个行动；和
- 最能**负面**影响您对美国看法的一个行动。

最能**正面**影响您对美国看法  
的一个行动

最能**负面**影响您对美国看法  
的一个行动

美国采取措施打击国际网络黑客行为。

美国大力投资科学领域，其所带来的突破性进展，继续造福全世界。

美国正采取措施，限制中美人文交流和技术合作。

作为世界第一大经济体，美国为全球经济增长和稳定做出了重大贡献。

1 of 8

# M3 Message Testing: How to Interpret the Results

- **Preference Scores:**
  - Through the M3 process, respondents reveal their relative preferences for the each message.
  - These scores are NOT percentages.
  - Taken together the preference scores for all messages will always add to 100.
  - In effect respondents collectively distribute 100 points across the messages based on their relative appeal.
- **Reach Analysis:**
  - While the preference scores tell us the relative ranking of the messages for all respondents, a message's "reach" equals the percentage of respondents ranking that item as their favorite or second favorite message.
  - The "reach" for any two messages equals the percentage of respondents ranking either message as their favorite or second favorite.
  - Our algorithm examines the total reach for every possible message combination and determines the message packages that have the broadest appeal.
  - As an analogy, think of individual messages as items on a restaurant menu. Similar menu items such as two types of steak attract the same type of customer. Adding different types of menu items, such as seafood or vegetarian selections, broaden the overall appeal of the menu by "reaching" different customer types.

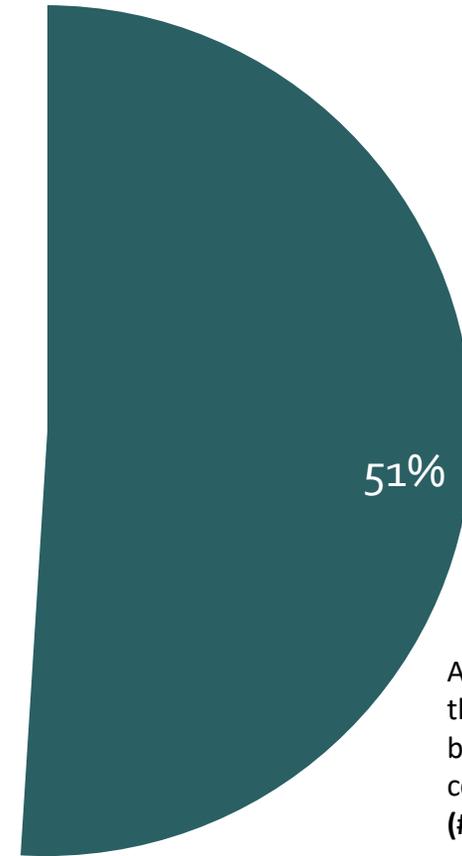
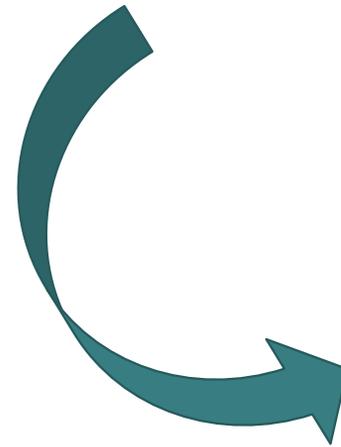
# M3: Best Messages Supporting China-U.S. Cooperation

Comment: The “largest economies”, the “China’s modernization of economy system” and the “seek collaboration” messages scored significantly better than others.

	Score
As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.	15.5
The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.	11.9
Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	10.9
The U.S. is an extremely important market for China goods and services and cooperating with U.S. is the best way to get maximum access to this market.	10.0
The growth of the US economy is conducive to reducing its xenophobic nationalism and protectionist policies. We should promote US economic growth by expanding economic and trade cooperation with the United States.	9.7
The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.	9.4
The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.	9.3
The U.S. and China should find ways to cooperate on common interests such as climate change, artificial Intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	9.2
The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.	8.3
Cooperating with China is the best way to encourage the country to continue improving the environment and dealing with climate change.	5.8

# M3 Reach Analysis: Best Messages Supporting China-U.S. Cooperation

**51% of respondents**  
identified this message as  
the strongest or second-  
strongest message



As the two largest economies in  
the world, the U.S. and China can  
both benefit more from  
cooperation than from conflict.  
**(#1 message by preference score)**

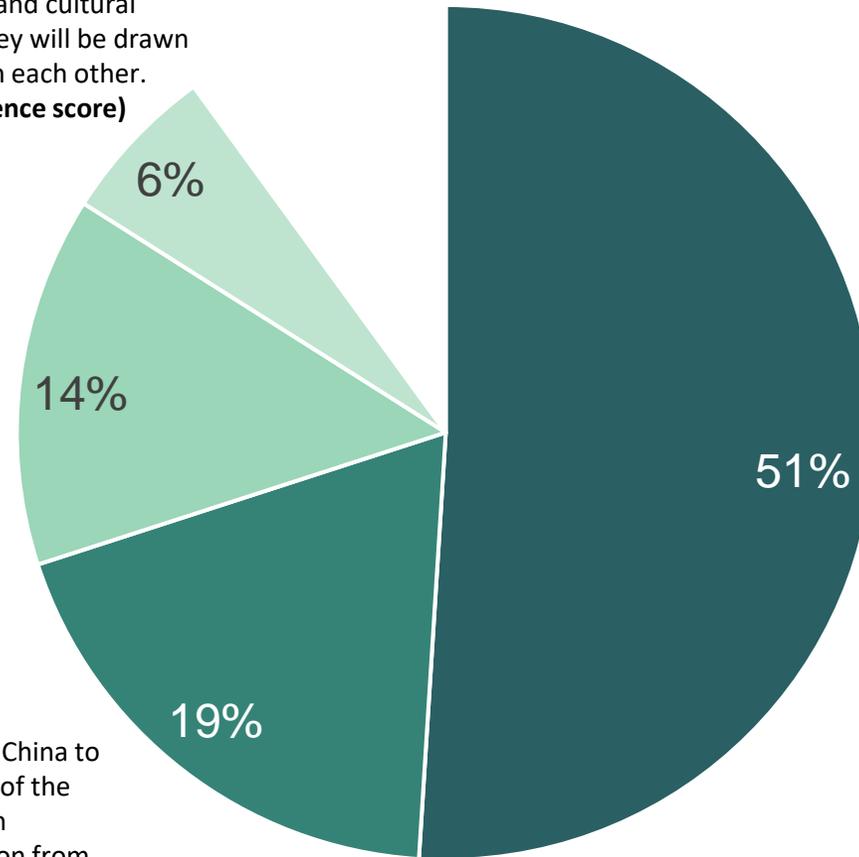
# M3 Reach Analysis: Best Messages Supporting China-U.S. Cooperation

The optimal seven message package reaches **90% of respondents**

The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.  
**(#6 message by preference score)**

The growth of the US economy is conducive to reducing its xenophobic nationalism and protectionist policies. We should promote US economic growth by expanding economic and trade cooperation with the United States.  
**(#5 message by preference score)**

The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.  
**(#2 message by preference score)**



As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.  
**(#1 message by preference score)**

# M3: Most Positive Actions the U.S. Has or Could Take

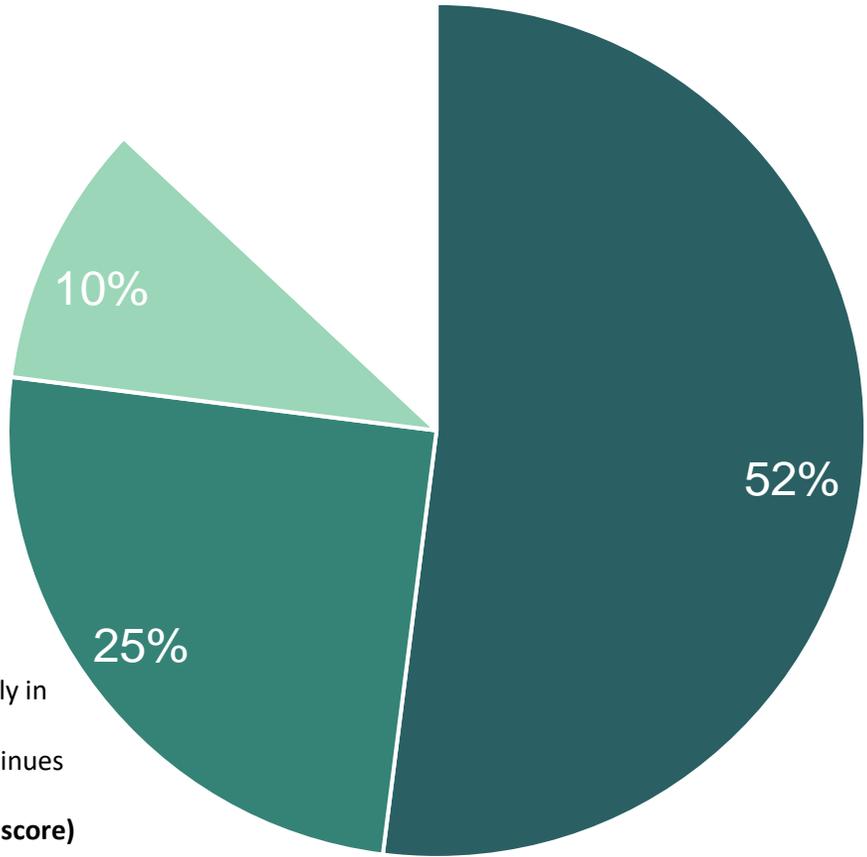
Comment: “U.S. cooperation with China on on political, economic, environmental and cultural issues” is viewed by Chinese as the strongest action that U.S. could take by a significant margin.

	Score
China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.	16.3
The U.S. has invested heavily in the scientific field, and its breakthrough progress continues to benefit the world.	15.9
As the world's largest economy, the U.S. has made significant contributions to global economic growth and stability.	15
China and the U.S. have continued the enhancement of military cooperation and information sharing with each other.	12.4
The U.S. encourages Small and Medium-Sized Enterprises to innovate and increase employment in high-tech industries	11.4
The U.S. has taken measures to combat international cyber hacking.	7.7
The U.S. is working closely with the U.S. and other nations to block the expansion of the North Korean nuclear program.	5.6
The Trump administration has taken a number of measures to reform immigration policies and restrict immigration.	5.4
US President Trump announced US withdrawal from the Paris Agreement, which aims to address global climate change.	5.3
The U.S. is taking measures to restrict China-US culture exchange and technical cooperation.	5

The optimal three message package reaches **87% of respondents**

# M3 Reach Analysis: Most Positive Actions the U.S. Has or Could Take

The U.S. is taking measures to restrict China-US culture exchange and technical cooperation.  
**(#10 message by preference score)**



China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.  
**(#1 message by preference score)**

The U.S. has invested heavily in the scientific field, and its breakthrough progress continues to benefit the world.  
**(#2 message by preference score)**

# Annual Survey on Beijing Experts' Opinion of the U.S.

Research Center for Contemporary China, Peking University  
July 2019

# Methodology

- The Beijing expert survey targets the middle-level managers who have experiences of cooperation or communication with the United States in trade, culture, science and technology, education and other aspects, working at party organs/governments, universities/research institutes, enterprises, or organizations in Beijing.
- Without an available sampling frame, the Beijing expert survey uses quota sampling method. The total valid sample size is 200, which includes
  - 80 middle and senior managers in enterprises.
  - 70 scholars in research institutes /universities.
  - 50 cadres at the division head level or deputy division head level of Party organs/ governments.
- Survey fielded from June 10-July 6, 2019
- Messages supporting China-U.S. cooperation and positive actions the U.S has taken or could take were tested using Prime Group's M3 methodology

# Key Findings

## 1 of 3

- Despite all of the developments in and news surrounding China-U.S. relations, Beijing experts' opinion of the U.S. ranks third in seven countries followed by Japan, which are unfavorable countries by Chinese urban residents. Besides, of the seven countries tested India has the lowest favorable ratings.
- President Trump is viewed favorably by just 5% of Beijing experts, the same rating given to Japanese Prime Minister Shinzō Abe. However, 69% view Trump unfavorably compared while 65% view Abe unfavorably. 25% of Beijing experts are either neutral or unable to rate Trump.
- Most of Beijing experts view U.S. as having a strong military (88%), being aggressive (83%), and being innovative (75%). Less than one-in-ten see U.S. as a friend of China (8%), peaceful (7%) and plays by international rules (7%).
- Just 5% of Beijing experts say the U.S. leaders can be trusted in their dealings with China, less than Chinese urban residents (20%). More than half (63%) say the U.S. leaders cannot be trusted. The rest are neutral or unsure.
- 3% of Beijing experts rate the relationship between China and the U.S. positively while 72% rate it negatively. 32% expect that relationship to improve over the next ten years while 22% think it will worsen. Beijing experts are more negative than Chinese urban residents in China-U.S. relationship.
- Of ten issues concerning the U.S. Beijing experts are most familiar with the trade friction between China and the U.S. (91%), top leaders meeting of North Korea (67%), gun rights disputes in the U.S. (63%) and cybersecurity disputes between China and the U.S. (63%).

# Key Findings

## 2 of 3

- Of the ten issues tested Beijing experts are most concerned with the trade friction between China and the U.S. (90% list it in the top three), cybersecurity disputes with the U.S. (56.5%) and Trump Administration's Immigration Policy(27%).
- Beijing experts think the U.S. is more responsible for the current trade tensions than China with 75% blaming the U.S., 3% blaming China and 14% blaming both equally.
- More than four fifths of Beijing experts (82%) believe that trade friction between China and the U.S. is having a negative impact on the global economy.
- Most Beijing experts believe that China and the U.S. will benefit equally from increased trade (38%) or are unsure who will benefit more (25%).
- About two thirds of Beijing experts (59%) think China should engage and cooperate with the U.S while 25% think China should try to limit U.S. global influence and 16% are not sure.
- Over half of Beijing experts (83%) think the recent imposition of tariffs between China and the U.S. is having a negative effect on their trading relationship.
- Most Chinese (76%) believe that China-U.S. educational and technological cooperation should be increased (71%) or maintained at current levels (5%) while 5% think it should be reduced. The rest are unsure.

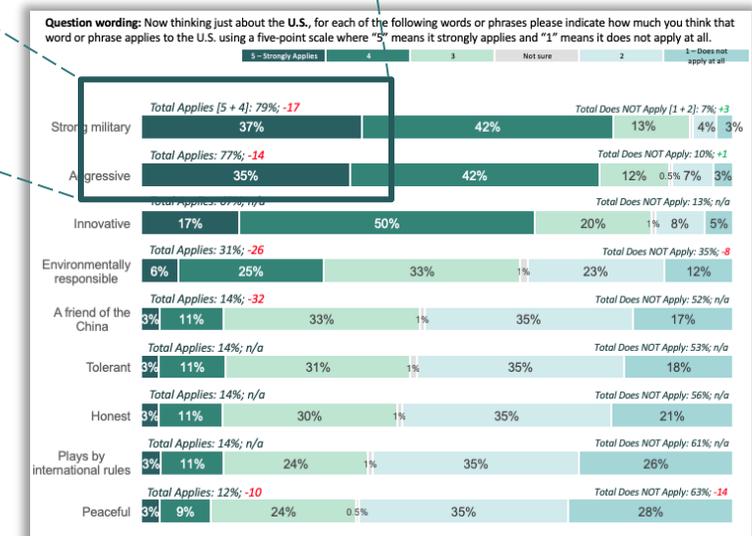
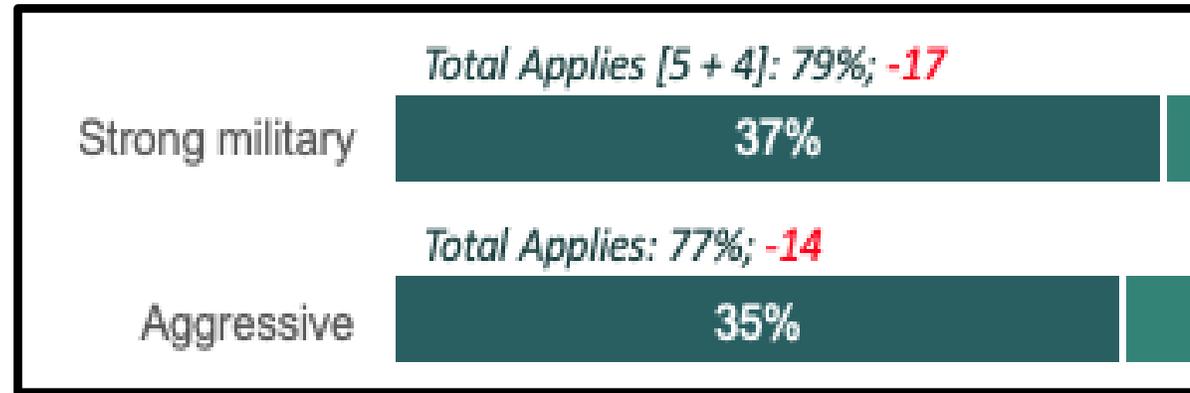
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- More Beijing experts (43%) think U.S. economic growth is good for China than think it is harmful (8%) while nearly half (49%) take a neutral position.
- Beijing experts are divided on whether U.S. and China interests will lead to cooperation (72%) or to conflict (17%) with 12% unsure. There are more Beijing experts (5%) than Chinese urban residents saying cooperation than conflict.
- The strongest messages in support of China-U.S. cooperation are:
  - The countries have more to gain from cooperation than from conflict;
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- Beijing experts identify the most positive actions U.S. has taken or could take as:
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On most slides, data are presented in a bar chart format as seen below.

- The bar displays every answer category for each question or data point.
- The italics above the bar show the aggregate data for the top two answer categories; in this example it displays the Total of 5-Strongly Applies+ 4 Somewhat Applies for each words or phrases rated.
- If the question or data point was also in the **national survey**, the colored number to the right shows the change. Where the data have increased or stayed the same the number is shown in green, and where the data have decreased the number is shown in red.

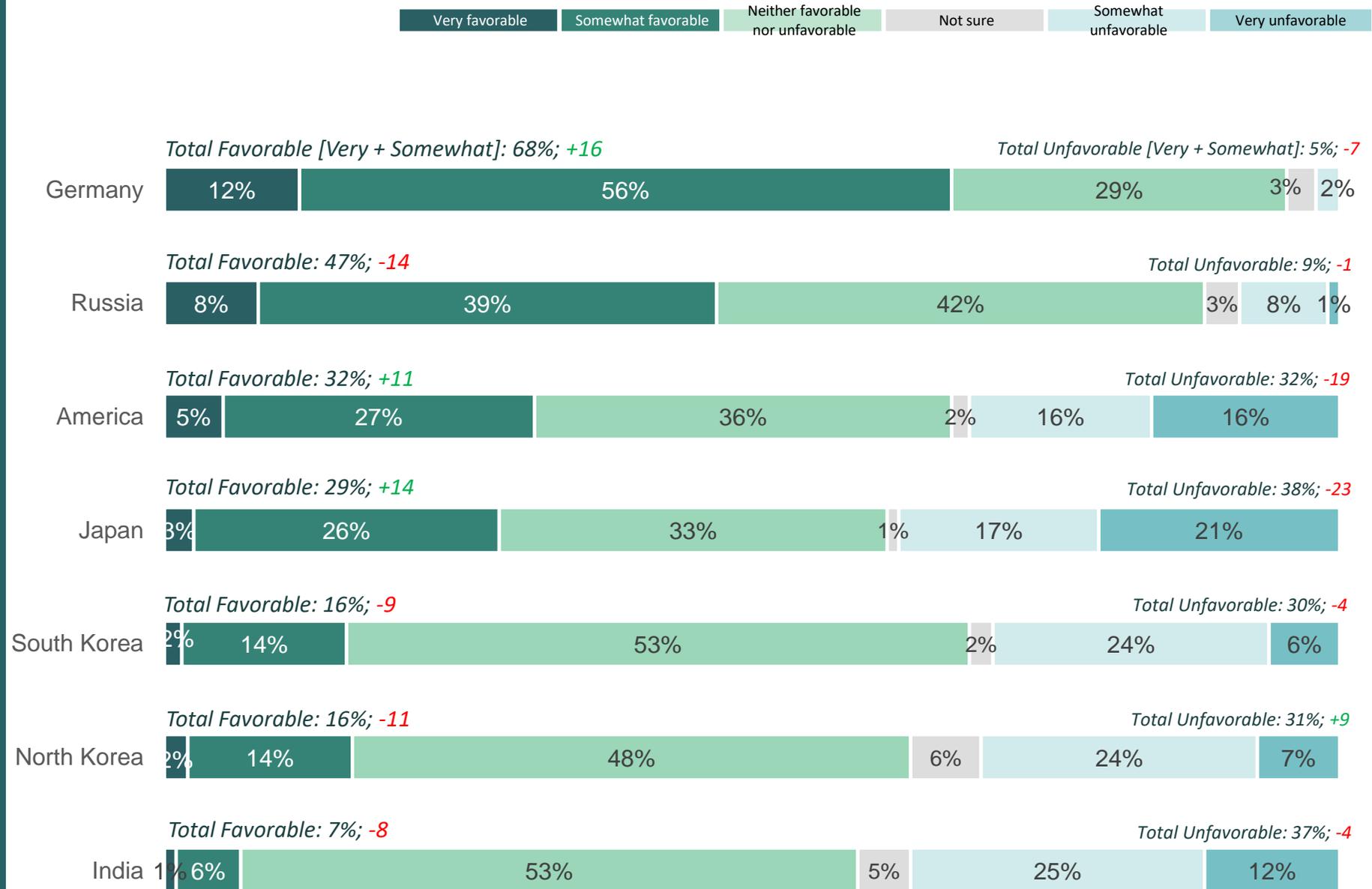


# How to Use this Report

# Country Favorability Ratings

Comment: U.S. rating is the same as unfavorable (32%) as favorable (32%).

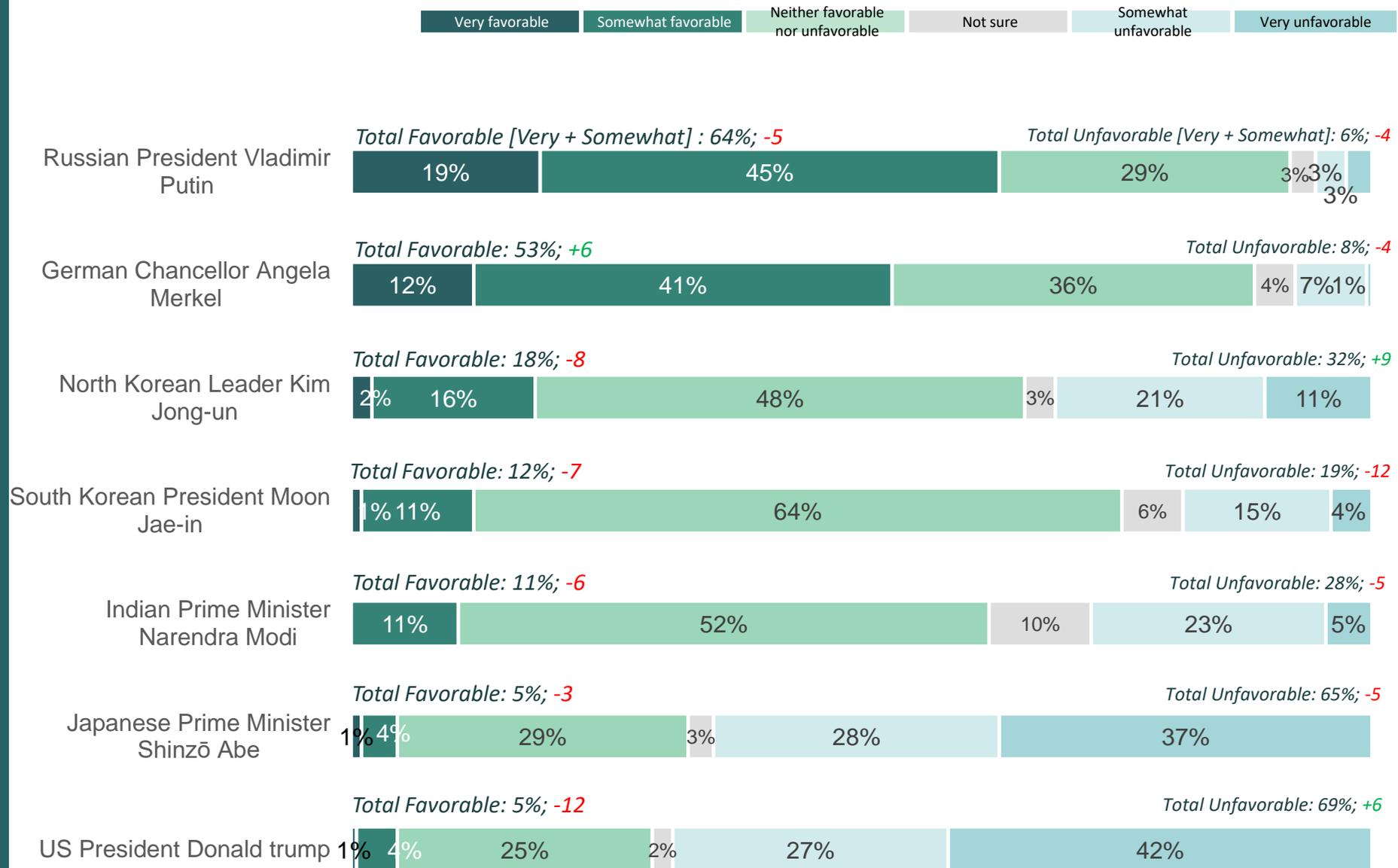
**Question wording:** Please indicate for each of the following countries if you have a favorable or unfavorable opinion of that country?



# Country Leader Favorability Ratings

Comment: 27% of Beijing experts are neutral or unsure about rating President Trump but his unfavorable rating (69%) is about fourteen times his favorable rating (5%).

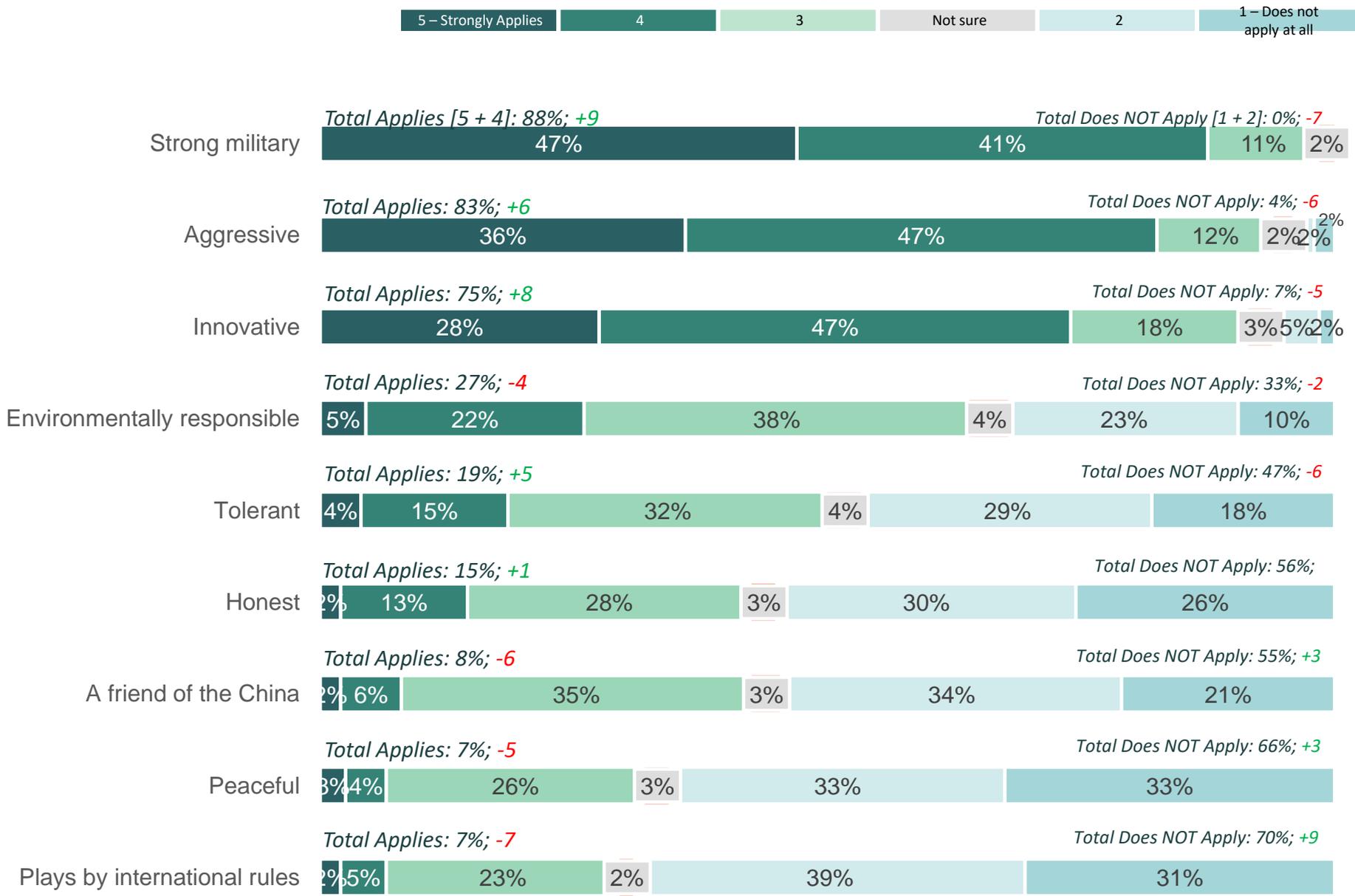
**Question wording:** Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?



# Perceived Attributes of U.S.

Comment: Strong military (neutral?), Aggressive (negative?), and Innovative (positive?) are the three traits most associated with U.S. (of those tested). A friend of China, Peaceful and Plays by international rules are the least associated traits.

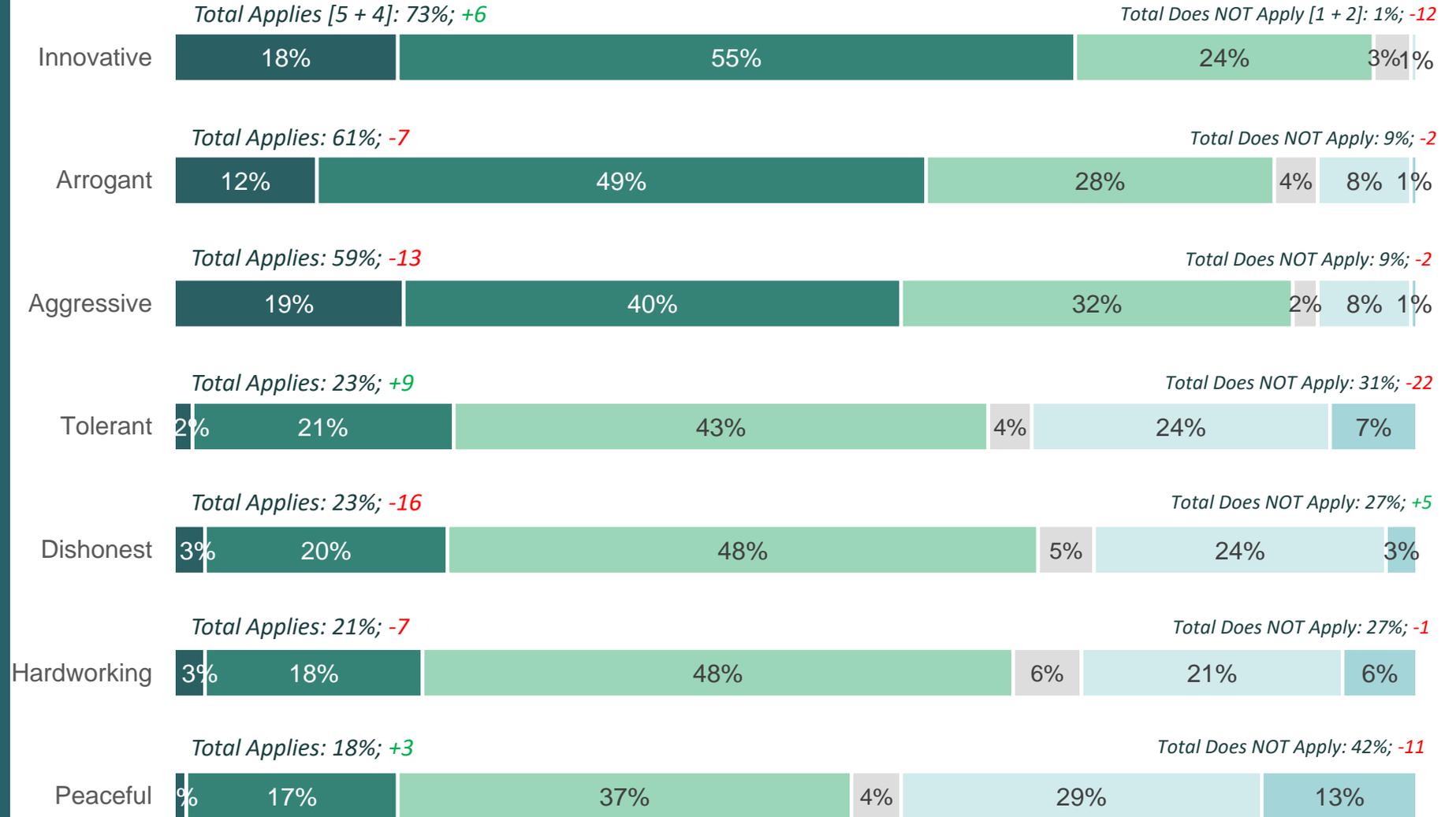
**Question wording:** Now thinking just about the **U.S.**, for each of the following words or phrases please indicate how much you think that word or phrase applies to the U.S. using a five-point scale where "5" means it strongly applies and "1" means it does not apply at all.



# Perceived Attributes of the American People

Comment: The American people are seen as innovative, arrogant, and aggressive by between about two-thirds and three-fourth of Beijing experts. Most Beijing experts do not think the American people are hardworking or peaceful.

**Question wording:** Now thinking just about the **American people**, for each of the following words or phrases please indicate how much you think that word or phrase applies to the American people using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.



Question wording: How familiar are you with the U.S. position on the Korean nuclear issue?

Very familiar

Somewhat familiar

Not very familiar

Not at all familiar

Never heard

# The U.S. Position on the Korean Nuclear Issue

Comment: About half of Beijing experts are familiar with the U.S. position on the Korean nuclear issue.

Total Familiar [Very + Somewhat]: 51%; -7

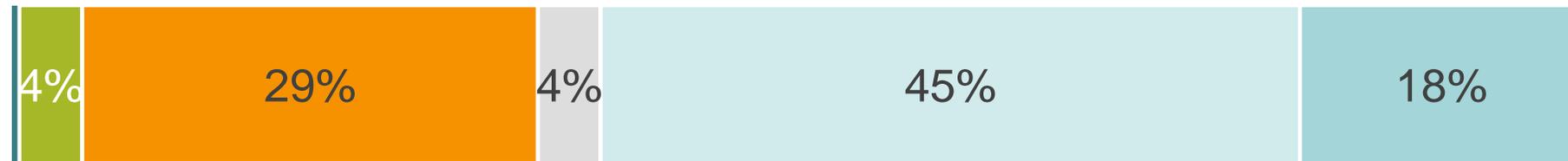


**Question wording:** How much do you think the leadership of U.S. can be trusted in their dealings with China using a five-point scale where 5 is a great deal and 1 is not at all?



*Can be trusted [5 + 4]: 5%; -15*

*Can NOT be trusted [1 + 2]: 63%; +11*



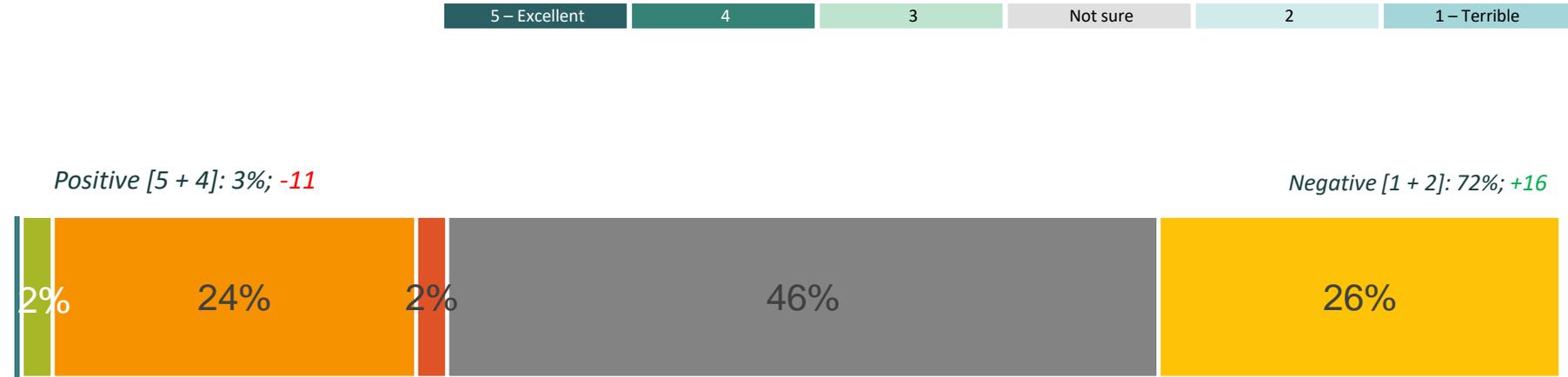
# Can the leadership of U.S. be trusted?

Comment: Beijing experts' trust in U.S. leaders in their dealings with China decreases 15% compared with Chinese urban residents and only 5% thinking the leadership of the U.S. is trustworthy.

# China-U.S. Relationship Now and In the Future

Comment: Beijing experts' view of the China-U.S. relationship is more negative than Chinese urban residents and their expectations for change in that relationship is somewhat more negative.

**Question wording:** How would you rate the relationship between China and the U.S. on a five-point scale where "5" is excellent and "1" is terrible?



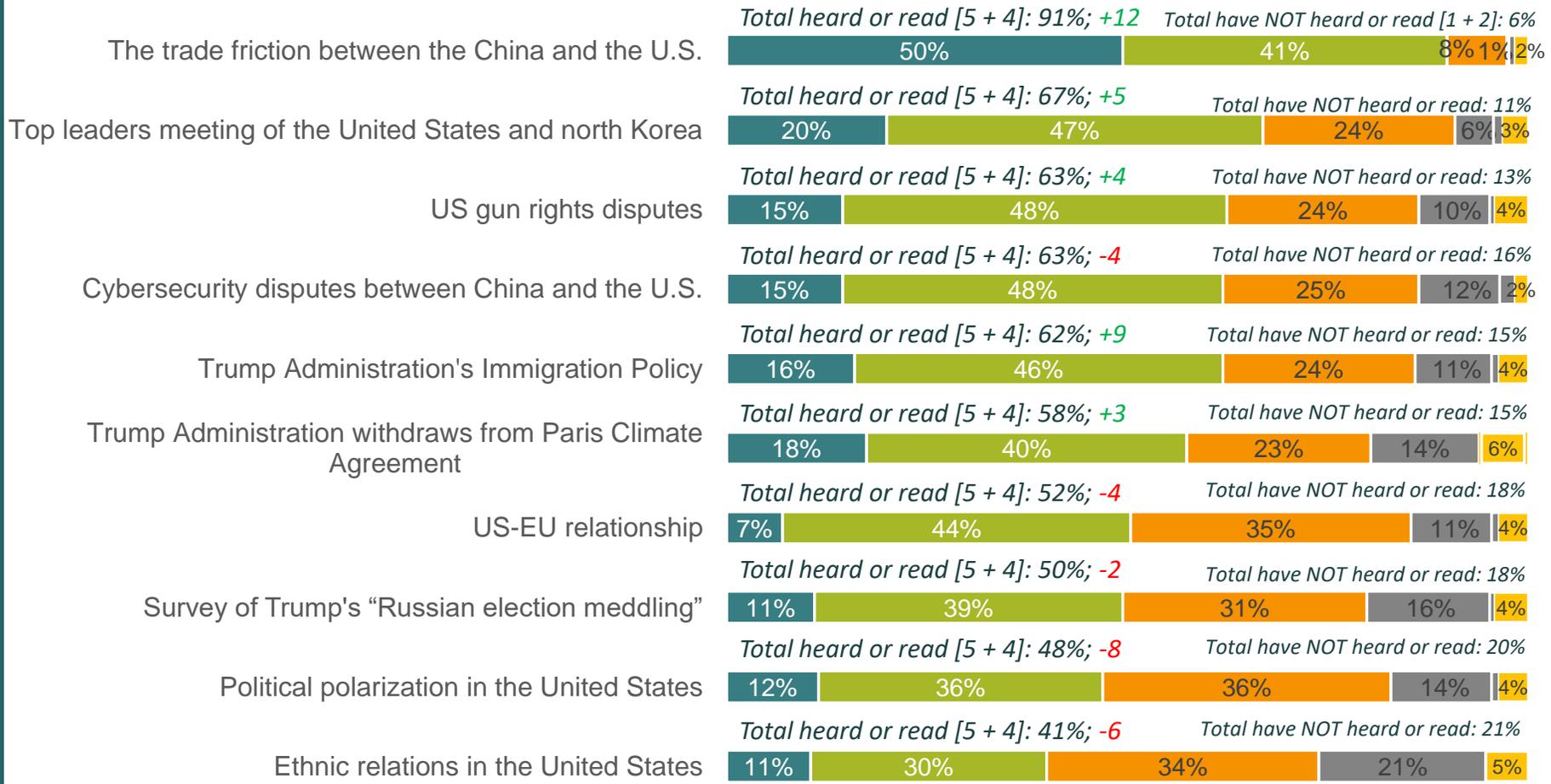
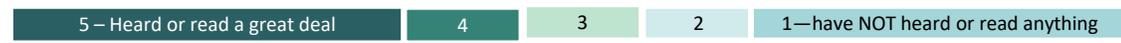
**Question wording:** Over the next ten years do you think the relationship between the U.S. and China will get better or worse or stay the same?



# Familiarity with Issues Concerning the U.S.

Comment: Trade friction between China and the U.S. is the only issue (of ten tested) that has over ninety percent of Beijing experts very or somewhat familiar with it. Most of the issues have over half Beijing experts familiar with them.

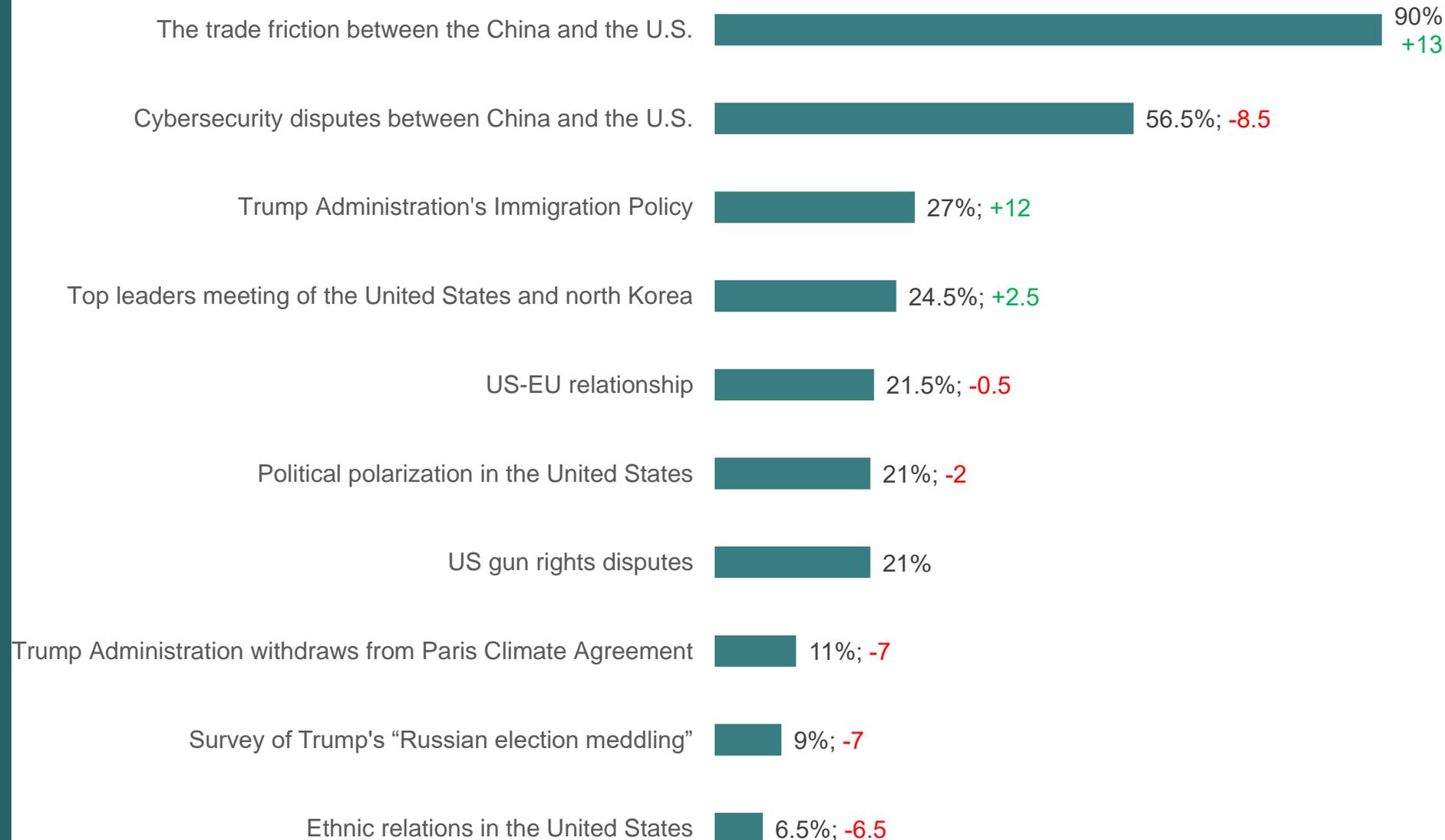
**Question wording:** For each of the following issues concerning U.S. please indicate how much you have heard or read about that issue using a five-point scale where “5” means you have heard or read a great deal and “1” means you have not heard or read anything at all.



# Concern with Issues about the U.S.

Comment: Trade friction, cyber security disputes, and immigration policy in the United States are the issues of greatest concern to Beijing experts (among those tested).

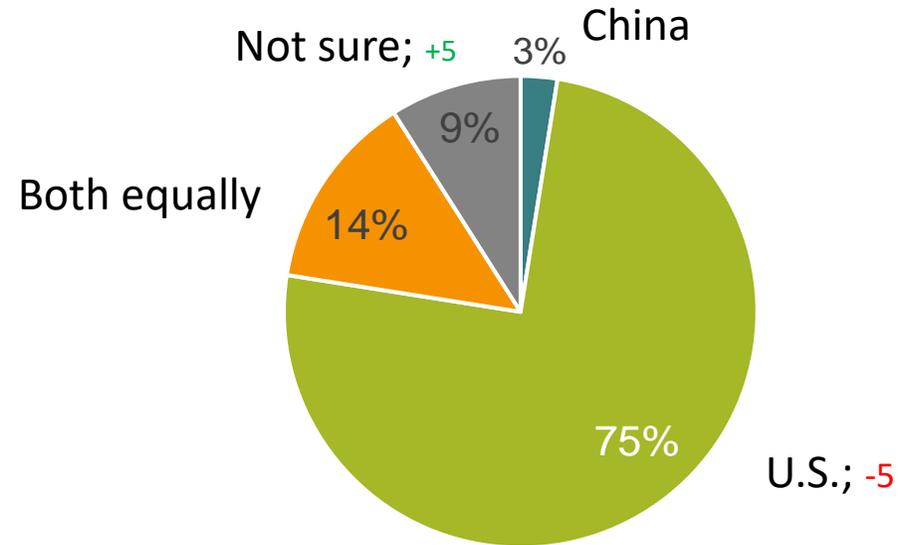
Question wording: Of the following issues which THREE cause you the greatest concern? % selecting



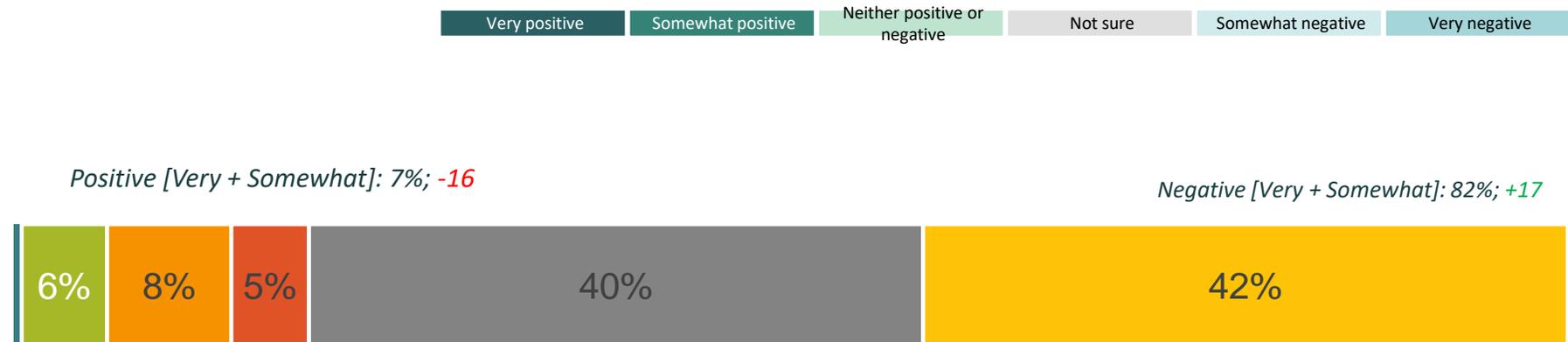
# China-U.S. Trade Tensions

Comment: Beijing experts think the U.S. is more responsible for the current trade tensions than China and more than four fifths think those tensions are having a negative impact on the global economy.

**Question wording:** Who do you think is more responsible for the trade tensions between China and the U.S.?



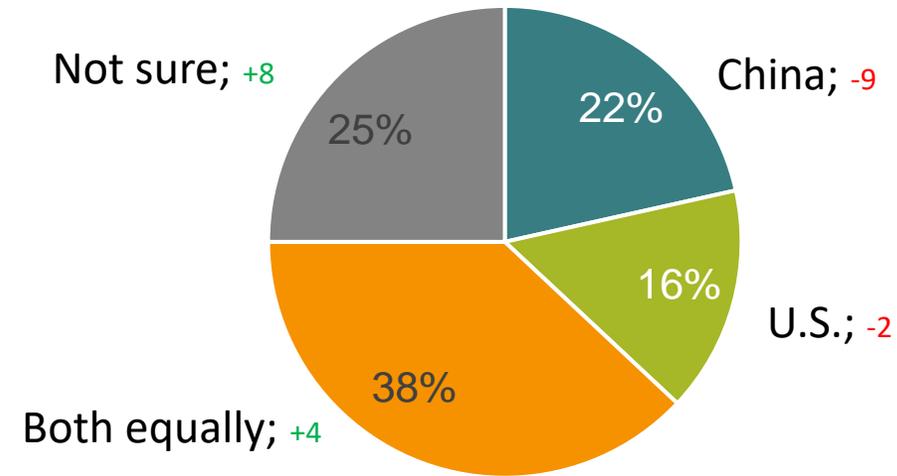
**Question wording:** Do you think that the current trade friction between China and the U.S. is having a positive or negative impact on the global economy?



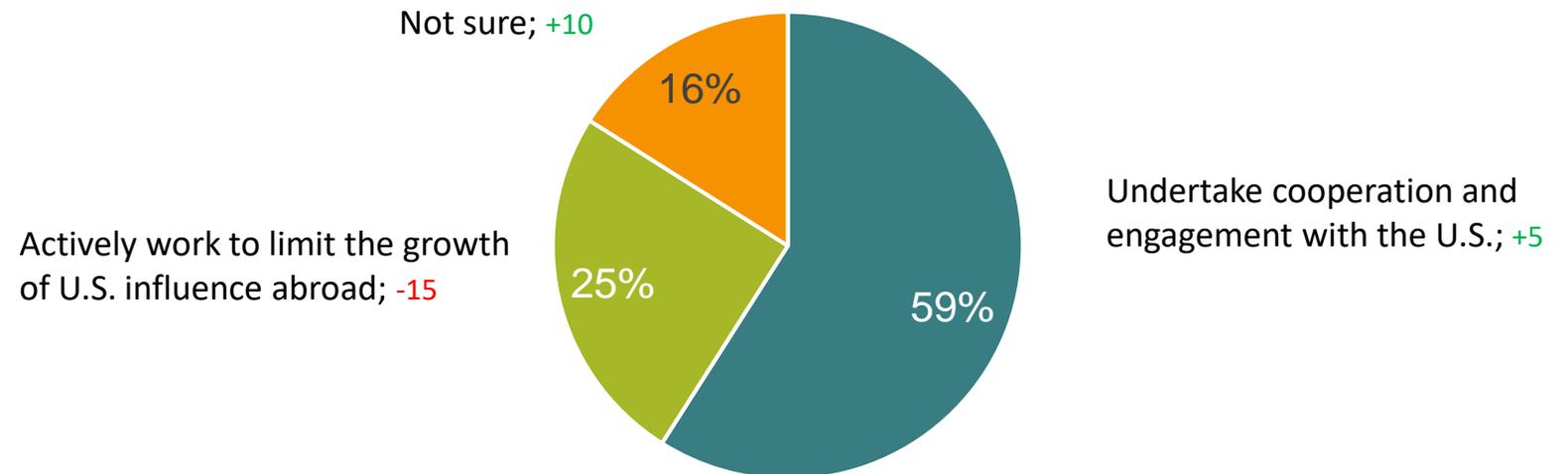
# China-U.S. Trade Relations

Comment: Beijing experts are divided on whether China benefit more (22%) or the U.S. benefit more (16%) from increased trade. More think China should engage and cooperate with the U.S. than think it should try to limit U.S. global influence.

**Question wording:** Who will benefit more from increased China-U.S. trade?



**Question wording:** When dealing with the expansion of US national interests overseas, what do you think China should choose between the following two strategies?



**Question wording:** Do you think the tariffs on imported goods imposed first by the US and then by China are having a positive or a negative effect on the trading relationship between the two countries?



# Impact of Tariffs

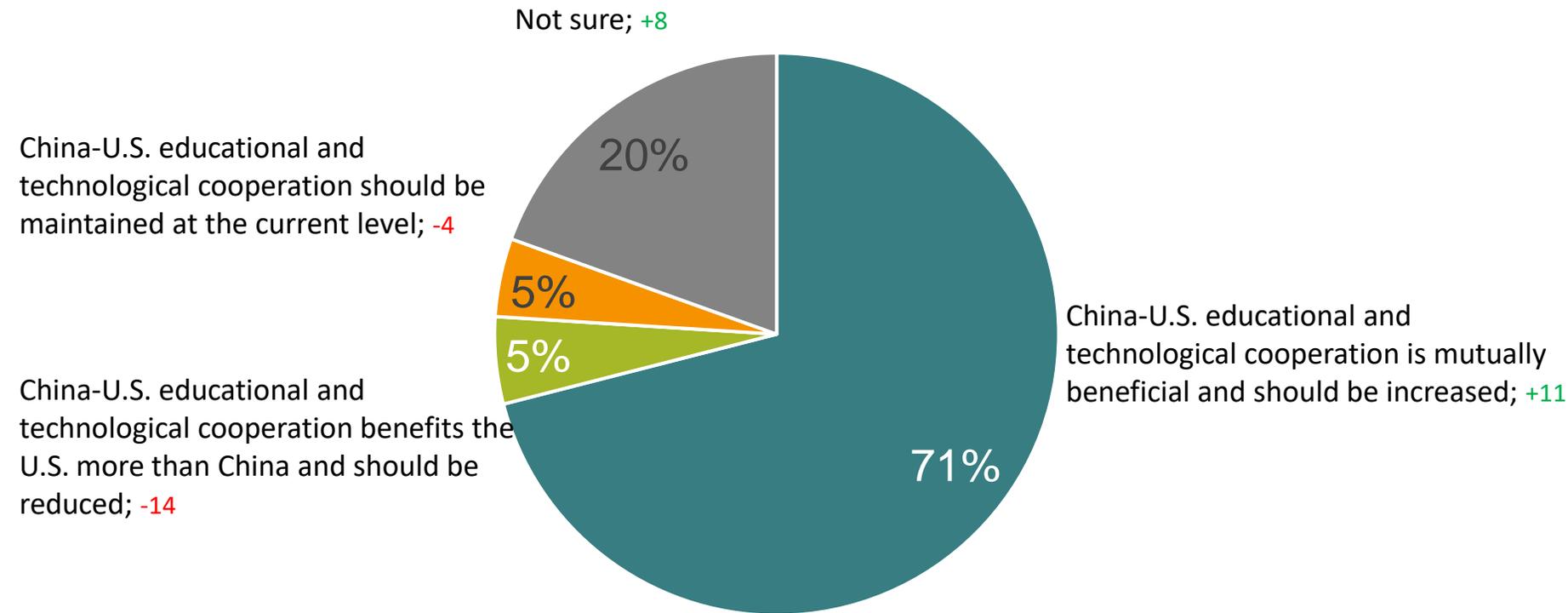
**Comment:**  
Overwhelmingly (83% to 7%) Beijing experts think the current round of bilateral tariffs is negatively affecting the trading relationship between the two countries.



# China-U.S. Educational and Technological Cooperation

Comment: Beijing experts are divided on whether educational and technological cooperation should be increased (71%) / kept the same (5%) or whether it should be reduced (5%).

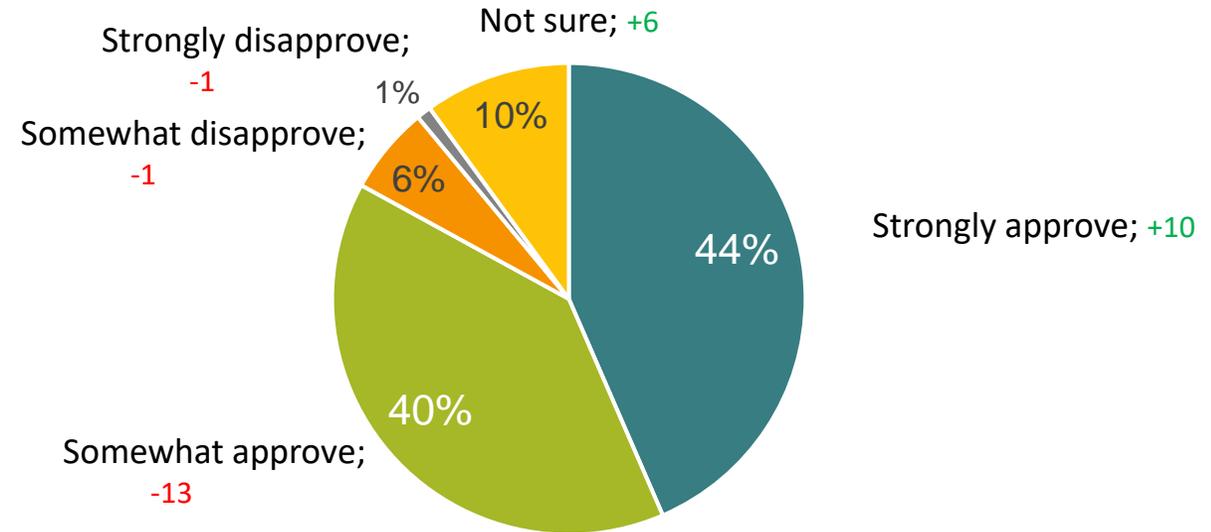
**Question wording:** China-U.S. educational and technological cooperation has been negatively affected by the recent tensions between the two countries. Which of the following statements is closest to your own opinion?



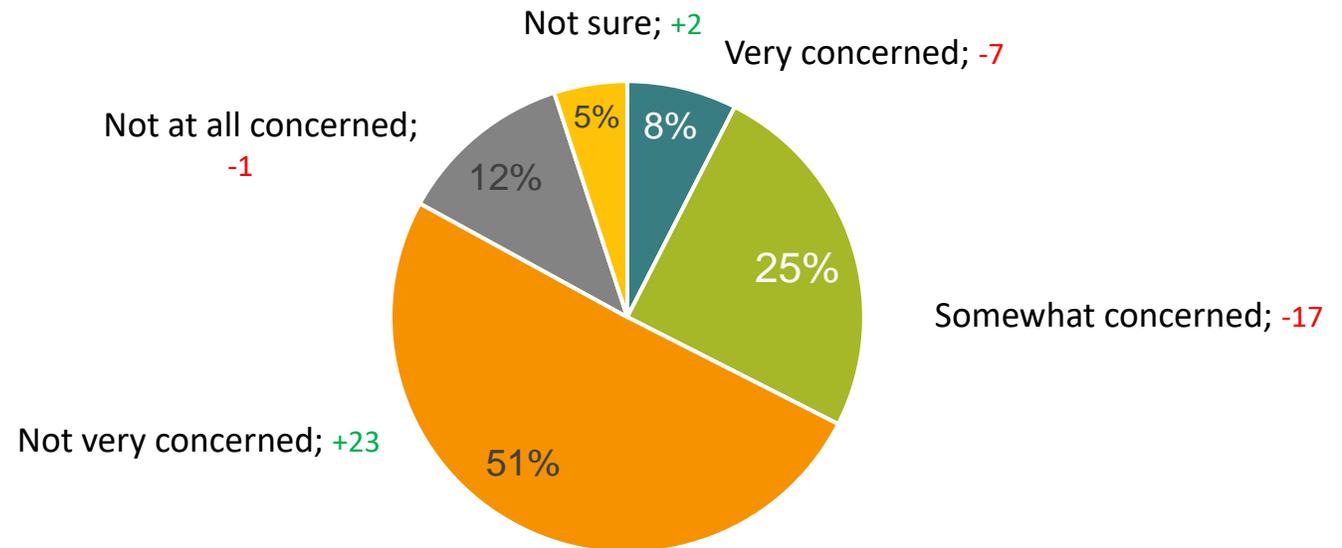
# China-U.S. Relations and China Politics

Comment: More Beijing experts approve of the Chinese government's handling of China-U.S. relations (88%) than disapprove (7%). Around 3/10 (33%, less than Chinese urban residents 57%) say they are concerned about U.S. influence in China domestic politics.

**Question wording:** Do you agree with the work done by the Chinese government in handling China-US relations since the 19th National Congress?



**Question wording:** Are you concerned about the U.S. influence in China domestic politics, or not?



Question wording: Overall, do you think that the U.S. economic growth is:

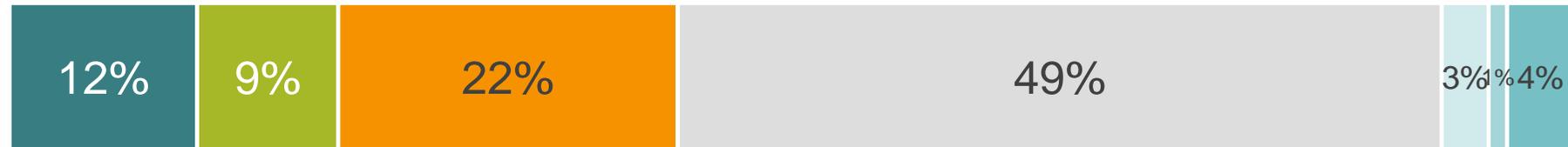


# Impact of U.S. Economic Growth on China

Comment: Beijing experts (more positive than Chinese urban residents) see U.S. economic growth as positive for China (43%) than as negative (8%).

Positive [7 + 6 + 5]: 43%; +3

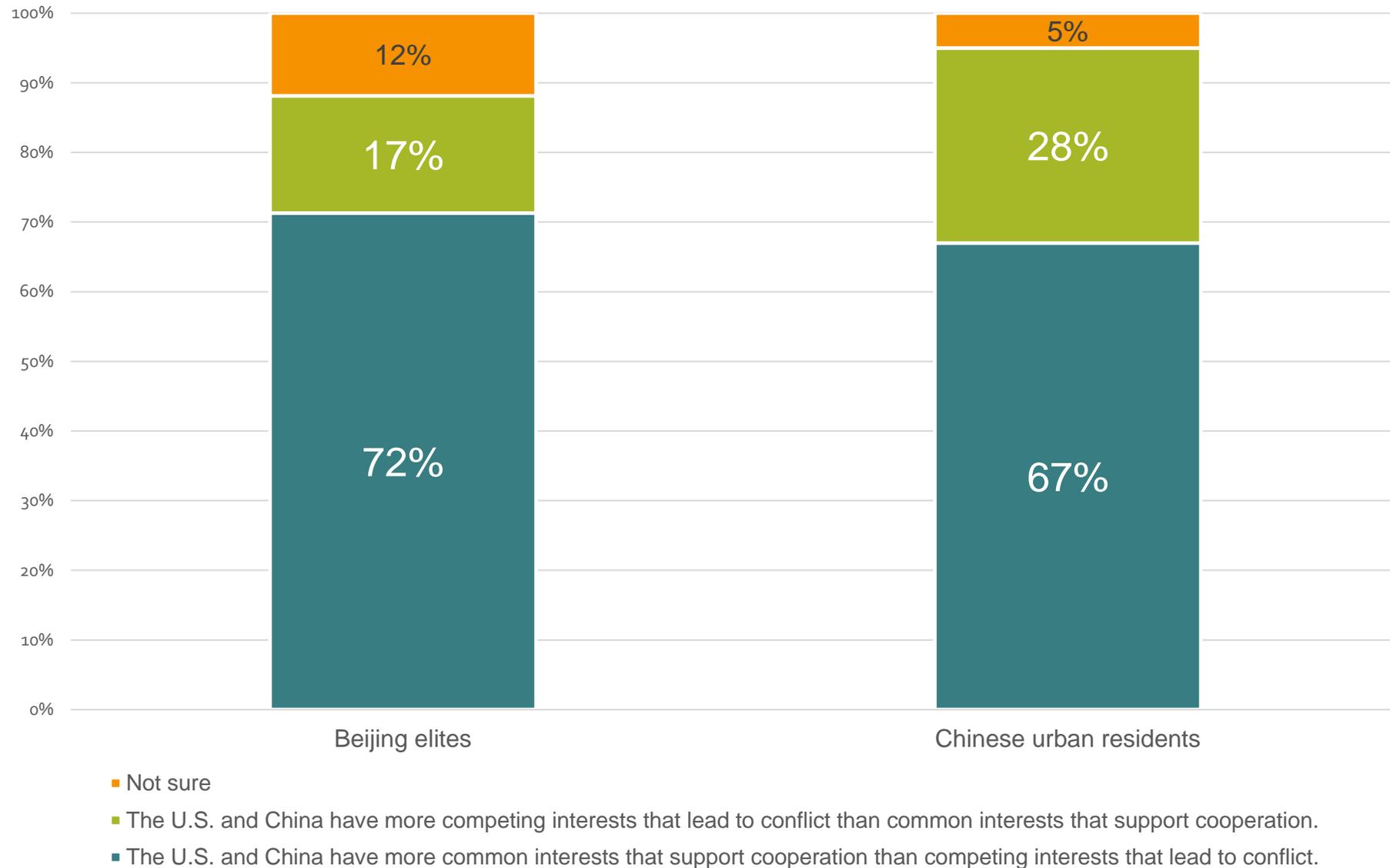
Negative [3 + 2 + 1]: 8%; -16



# China-U.S. Interests

Comment: Views on whether Chinese and U.S. interests will lead to cooperation or conflict are changed with slightly more Beijing elites than Chinese urban residents saying cooperation than conflict.

Question wording: Which of the following views is closer to your own?



# M3 Message Testing

# M3 Message Testing: Overview

- We tested 10 messages using Prime Group's M3 methodology.
- M3 testing is a forced choice methodology requiring respondents to react to a series of screens, each with four messages.
- Respondents are asked to choose the strongest and the weakest message on each screen. Each message is repeated multiple times but always with a different set of "competing" messages.
- With this sample size (n=200) this methodology produces more than 8000 unique data points, resulting in much greater precision and differentiation than traditional rating exercises which rely on each message being rated independently.

# M3 Message Testing: Sample Screen

在接下来的8个屏幕上，您将看到美国已经采取，可能已经采取的或即将采取的一些行动。请仔细阅读然后选择：

- 最能**正面**影响您对美国看法的一个行动；和
- 最能**负面**影响您对美国看法的一个行动。

最能**正面**影响您对美国看法  
的一个行动

最能**负面**影响您对美国看法  
的一个行动

美国采取措施打击国际网络黑客行为。

美国大力投资科学领域，其所带来的突破性进展，继续造福全世界。

美国正采取措施，限制中美人文交流和技术合作。

作为世界第一大经济体，美国为全球经济增长和稳定做出了重大贡献。

1 of 8

# M3 Message Testing:

## How to Interpret the Results

- **Preference Scores:**
  - Through the M3 process, respondents reveal their relative preferences for the each message.
  - These scores are NOT percentages.
  - Taken together the preference scores for all messages will always add to 100.
  - In effect respondents collectively distribute 100 points across the messages based on their relative appeal.
- **Reach Analysis:**
  - While the preference scores tell us the relative ranking of the messages for all respondents, a message's "reach" equals the percentage of respondents ranking that item as their favorite or second favorite message.
  - The "reach" for any two messages equals the percentage of respondents ranking either message as their favorite or second favorite.
  - Our algorithm examines the total reach for every possible message combination and determines the message packages that have the broadest appeal.
  - As an analogy, think of individual messages as items on a restaurant menu. Similar menu items such as two types of steak attract the same type of customer. Adding different types of menu items, such as seafood or vegetarian selections, broaden the overall appeal of the menu by "reaching" different customer types.

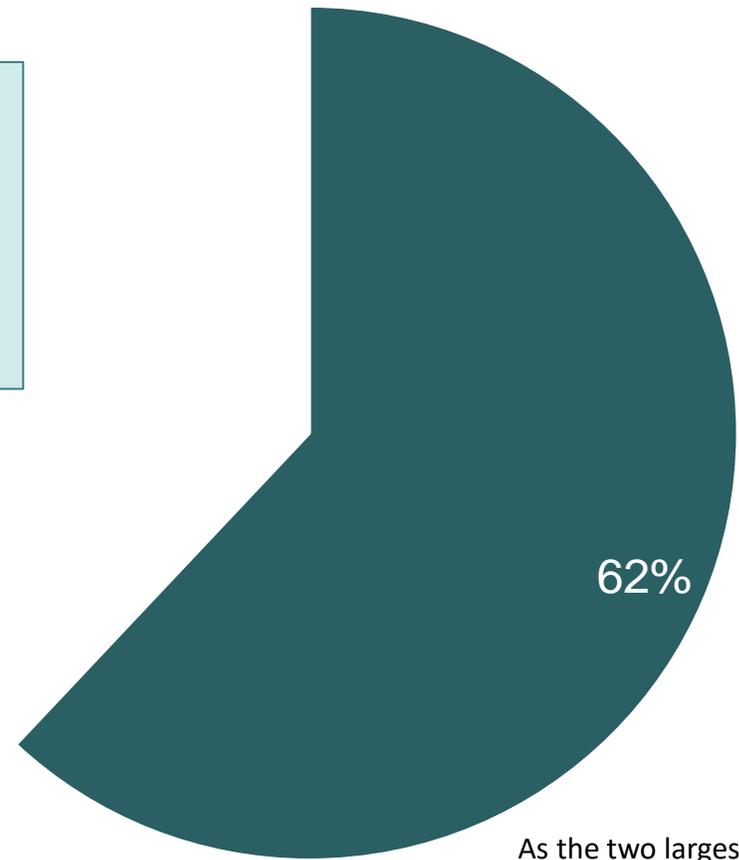
# M3: Best Messages Supporting China-U.S. Cooperation

Comment: The “largest economies”, the “China’s modernization of economy system” and the “work together rather than conflict” messages scored significantly better than others.

	Beijing	China
As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.	19.4	15.5
The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.	14.3	11.9
Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	8.1	10.9
The U.S. is an extremely important market for China goods and services and cooperating with U.S. is the best way to get maximum access to this market.	10.7	10.0
The growth of the US economy is conducive to reducing its xenophobic nationalism and protectionist policies. We should promote US economic growth by expanding economic and trade cooperation with the United States.	4.7	9.7
The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.	9.6	9.4
The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.	12.4	9.3
The U.S. and China should find ways to cooperate on common interests such as climate change, artificial Intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	9.2	9.2
The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.	7.7	8.3
Cooperating with the U.S. is the best way to encourage the country to continue improving the environment and dealing with climate change.	4.0	5.8

# M3 Reach Analysis: Best Messages Supporting China-U.S. Cooperation

**62% of respondents**  
identified this message as  
the strongest or second-  
strongest message



As the two largest economies in  
the world, the U.S. and China can  
both benefit more from  
cooperation than from conflict.  
**(#1 message by preference score)**

# M3 Reach Analysis: Best Messages Supporting China-U.S. Cooperation

The optimal seven message package reaches **95% of respondents**

Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.

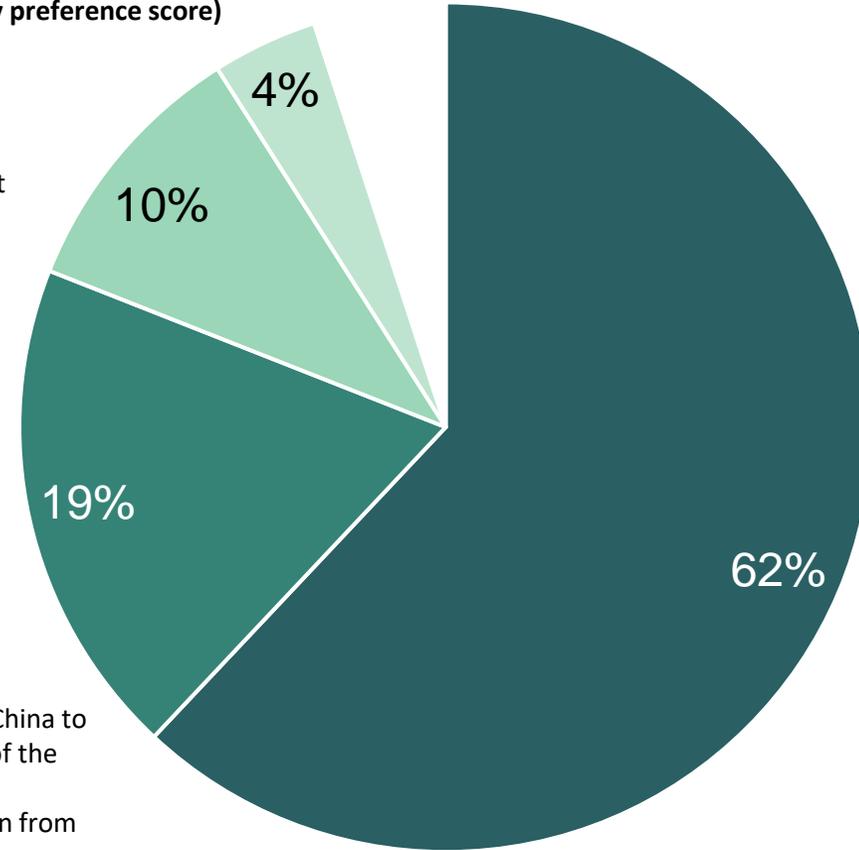
**(#7 message by preference score)**

The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.

**(#3 message by preference score)**

The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.

**(#2 message by preference score)**



As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.; **+11**  
**(#1 message by preference score)**

# M3: Most Positive Actions the U.S. Has or Could Take

Comment: “U.S. cooperation with China on on political, economic, environmental and cultural issues” is viewed by Chinese as the strongest action that U.S. could take by a significant margin.

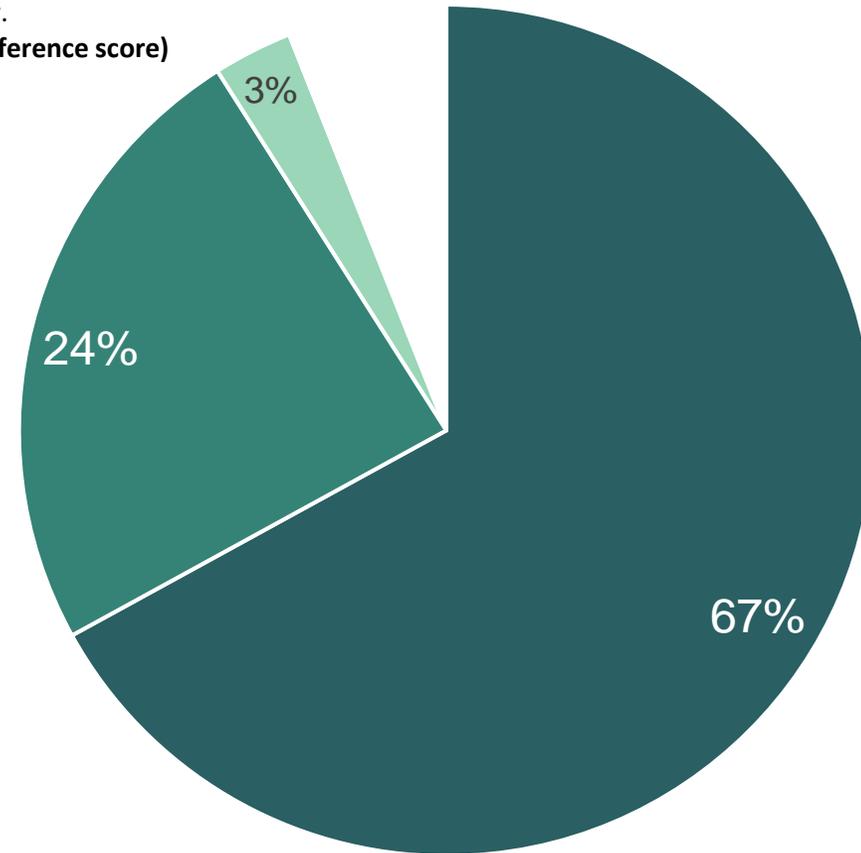
	Beijing	China
China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.	19.4	16.3
The U.S. has invested heavily in the scientific field, and its breakthrough progress continues to benefit the world.	17.9	15.9
As the world's largest economy, the U.S. has made significant contributions to global economic growth and stability.	16.0	15
China and the U.S. have continued the enhancement of military cooperation and information sharing with each other.	14.5	12.4
The U.S. encourages Small and Medium-Sized Enterprises to innovate and increase employment in high-tech industries	13.1	11.4
The U.S. has taken measures to combat international cyber hacking.	6.8	7.7
The U.S. is working closely with other nations to block the expansion of the North Korean nuclear program.	4.8	5.6
The Trump administration has taken a number of measures to reform immigration policies and restrict immigration.	3.2	5.4
US President Trump announced US withdrawal from the Paris Agreement, which aims to address global climate change.	2.1	5.3
The U.S. is taking measures to restrict China-US culture exchange and technical cooperation.	2.1	5

# M3 Reach Analysis: Most Positive Actions the U.S. Has or Could Take

The optimal three message package reaches **94% of respondents**

As the world's largest economy, the U.S. has made significant contributions to global economic growth and stability.  
**(#3 message by preference score)**

The U.S. has invested heavily in the scientific field, and its breakthrough progress continues to benefit the world.  
**(#2 message by preference score)**



China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.; +15  
**(#1 message by preference score)**

# Thank You.

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