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# 2015 CHINA NATIONAL IMAGE GLOBAL SURVEY

Compiled by : Communication Strategy Research Office, Center for International Communication Studies

China Foreign Languages Publishing Administration

Contact Number: (86-10) 68997123

E-mail: chinaimagecics@163.com

Website: www.chinacics.org



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About the Platform of China's National Image Survey

## About Survey 2015 and Main Findings

From January to March 2016 the Center for International Communication Studies under the China Foreign Languages Publishing Administration, Millward Brown and Lightspeed GMI jointly conducted the fourth global survey of China's national image.

The survey interviewed citizens of 19 member countries of the G20, covering Asia (China, Japan, South Korea, India, Indonesia and Saudi Arabia), Europe (UK, France, Germany, Italy, Russia and Turkey), North America (US, Canada and Mexico), South America (Brazil and Argentina), Oceania (Australia) and Africa (South Africa).

With 500 respondents from each country, a total of 9,500 respondents selected from the global panel of Lightspeed Research were included in this survey. The survey was conducted by using online questionnaires and strictly followed the international standards for online polls. In order to ensure the representation of the countries involved, the samples were local residents aged between 18 and 65 years, and the ratio of men to women was 50:50.

### Main findings of this survey:

- China's overall image is being steadily enhanced.
- Its economic influence ranks second in the world.
- Overseas respondents expect China to play a bigger role in the global economy, and science and technology.
- Its scientific innovation capacity is highly praised, especially its high-speed railway network.
- Overseas respondents are more interested in visiting China nowadays, with Beijing, Shanghai and Hong Kong their top destinations.



# Overall Image and Influence

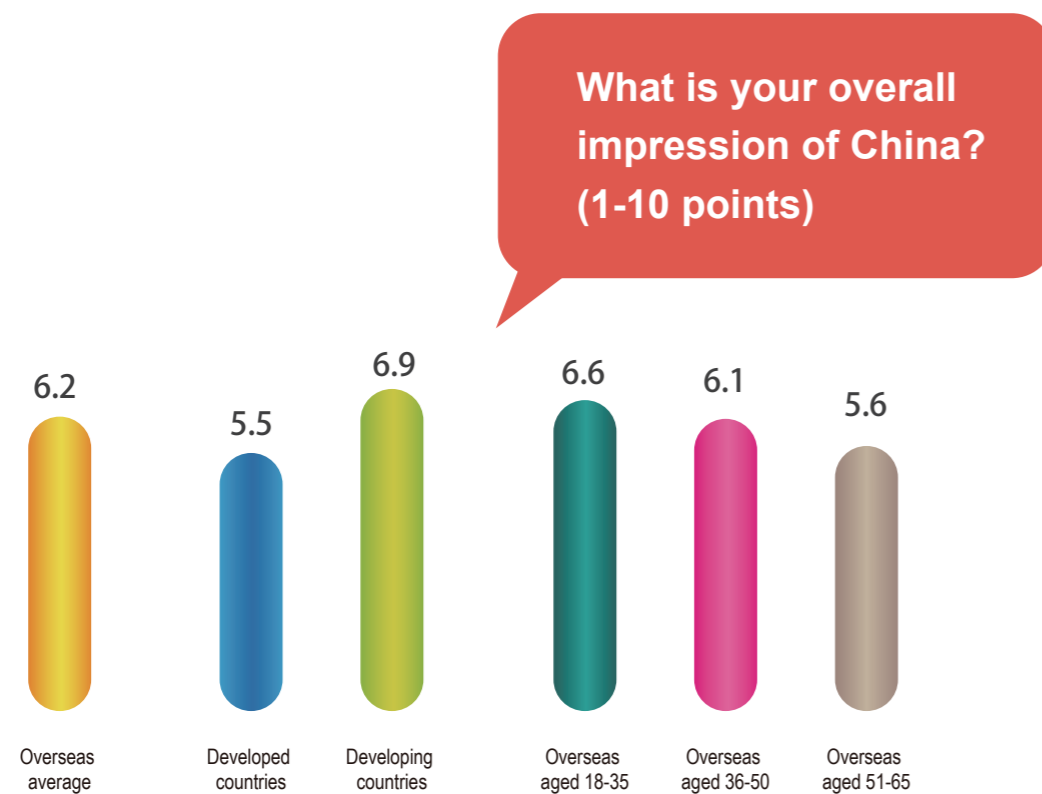
## China's image is steadily improving internationally.

China's image is being increasingly recognized worldwide, scoring 6.2 points on the average score (10-point system) and 0.3 higher than in 2014.

Developing countries had better impressions (6.9 points) of China than developed countries (5.5 points).

Overseas youth (aged 18-35) had the best impressions of China, compared with those aged 36-50 and 51-65. The scores among these three groups were 6.6 points, 6.1 points and 5.6 points, respectively.

Figure 1 Overall image of China



Samples: 9,000 overseas

## China ranks second in terms of influence in global affairs among all countries

The US ranked first, followed by China, Russia, Britain and Germany, in their influence in global affairs.

The result was the same as in Survey 2014.

Figure 2 Top Five countries with the biggest influence in global affairs



Samples: 9,500 global

# Images of China and Its Citizens

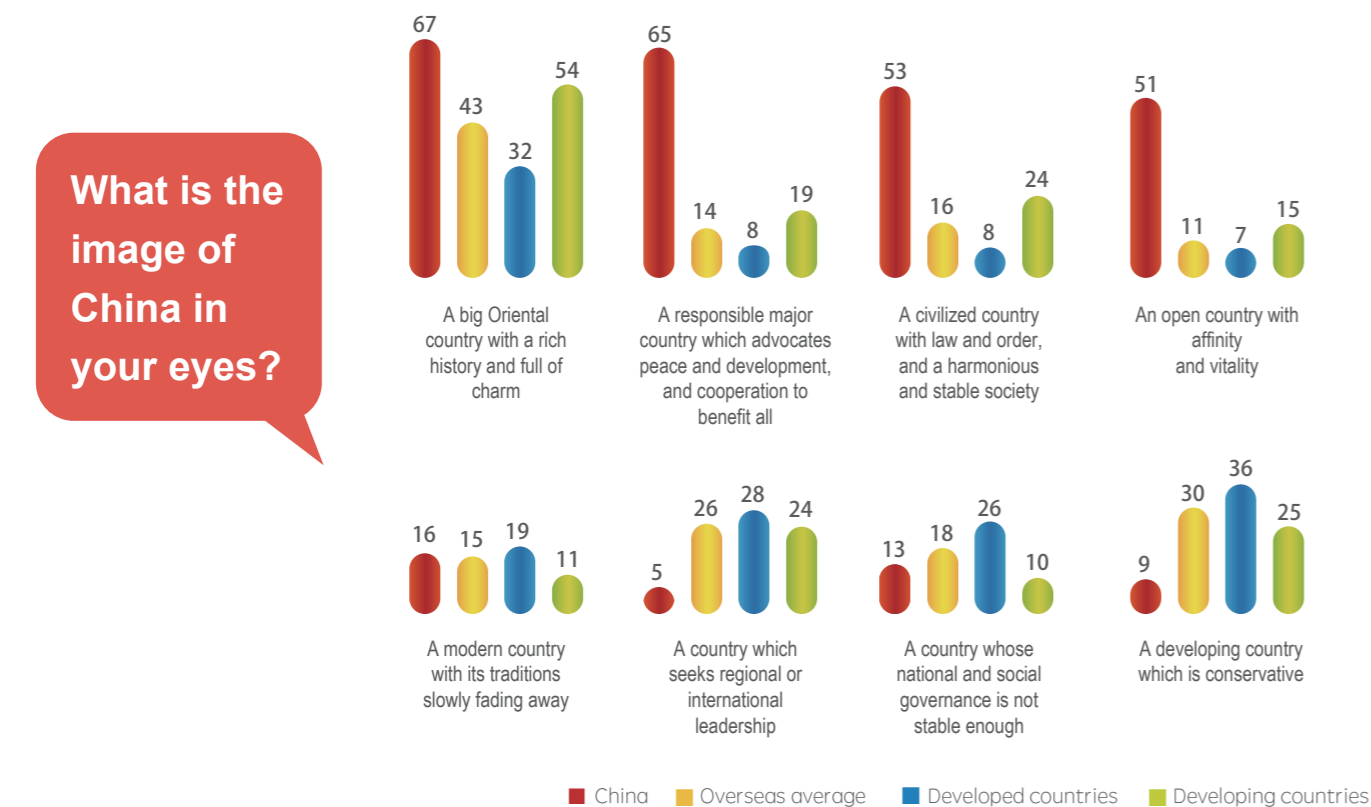
## A big Oriental country with a rich history and full of charm: the prominent image of China

About 43% of the overseas respondents deemed China to be a big Oriental country with a rich history and full of charm. As high as 54% of the respondents in developing countries showed their agreement.

The Chinese people had more positive views of their country. They generally believed that China is a country “with a rich history and full of charm”, “which advocates peace and development, and cooperation to benefit all”, and “an open country with affinity and vitality” and “with law and order, and a harmonious and stable society”.

The comments on China varied between developed countries and other developing countries except China, with the latter holding a more positive attitude in this regard.

Figure 3 Image of China (%)



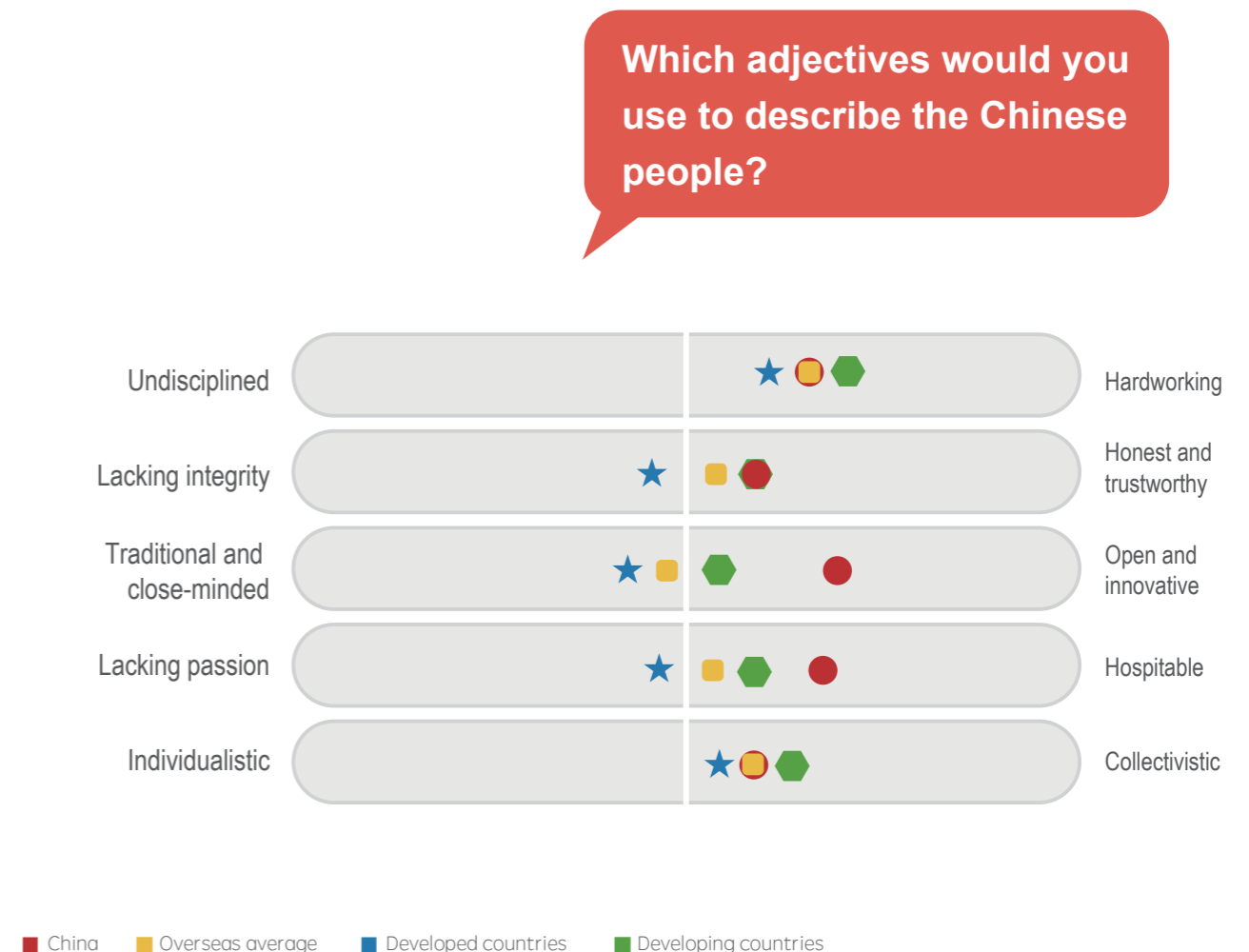
Samples: 9,500 global

## Diligence is the most recognized character of the Chinese people.

The global respondents have a positive impression of the Chinese people as a whole. Those in developing countries had better impressions.

In the eyes of most overseas respondents, the Chinese people are hardworking, collectivistic, hospitable, honest and trustworthy. Some people from developed countries tended to think that the Chinese are traditional and close-minded, and lack innovation.

Figure 4 Image of Chinese citizens



Samples: 9,500 global

## Overseas respondents are optimistic about China's future development despite challenges.

Overseas respondents are generally positive about China's future development, with nearly half of them believing that China's global influence will continue to grow. But 35% of the respondents thought that China still faces such challenges as corruption and a widening gap between rich and poor, as well as environmental pollution.

On the whole, more people agreed that China's economy faces more opportunities than challenges, and will continue to contribute to world economic growth.

The respondents in developing countries were more optimistic about China's future, as were overseas young people.

Figure 5 Future development of China (%)

How do you view China's future development?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
China will become the world's superpower.	24	19	29	26	24	20
China will remain the world's No. 2 economy.	19	20	18	19	18	20
China's economy faces more opportunities than challenges, and will continue to contribute to world economic growth.	25	18	32	27	24	24
China's economy faces more challenges than opportunities, with increasingly evident difficulties.	20	25	14	17	19	25
China's global influence will continue to grow.	49	42	55	50	48	48
China's global influence will decrease.	10	13	07	09	10	11
China's social governance and environmental protection will improve remarkably.	12	07	17	14	12	10
China still faces challenges such as corruption and increased gap between rich and poor, as well as environmental pollution.	35	44	25	29	34	44

Samples: 9,000 overseas

## China's Political and Diplomatic Images

### Strong cohesion and a rigorous organizational structure: the most prominent image of China's ruling party

Overseas respondents generally thought that China's ruling party has strong cohesion and a rigorous organizational structure.

Quite a number of people in developing countries thought that the party has exceptional organization and mobilization abilities, and impressive learning and innovation abilities.

Among different age groups, young people thought that the party has the ability of self-restraint and self-purification, "having impressive learning and innovation abilities" and "enjoying the support of the people", while older people had a general impression of the party's "having strong cohesion", "having a rigorous organizational structure", and "having exceptional organization and mobilization abilities".

Figure 6 Image of China's ruling party (%)

How do you view China's ruling party?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Having strong cohesion	41	44	39	36	41	51
Having a rigorous organizational structure	24	24	25	22	24	28
Having exceptional organization and mobilization abilities	19	15	23	18	19	20
Able to be self-restrained and self-purified	14	09	19	17	13	11
Having impressive learning and innovation abilities	14	08	20	17	13	10
Enjoying the support of the people	13	07	19	15	13	09

Samples: 9,000 overseas

## Developing countries are more positive about China's development path and model.

On average, 25% of the overseas respondents associated the dominance of the state-owned economy to China's development path and model.

More people in developed countries linked the Chinese path and model to the dominant position of the state-owned economy and to the leadership of the Communist Party of China, while more people in developing countries interpreted the Chinese path and model as "combining China's history and culture with its current national conditions" and "the main reason for China's rapid development", and thought that their own country "can learn something from China's development path".

Young people were more positive about the effects brought by the Chinese path and model.

Figure 7 Evaluation of China's development path and model (%)

How do you evaluate China's development path and model?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
State-owned economy's dominant position	25	28	23	20	25	35
Being the main reason for China's rapid development	23	20	26	25	21	21
Sticking to the leadership of the Communist Party of China	22	23	21	20	21	29
Combining China's history and culture as well as its current national conditions	21	14	28	22	21	18
My country can learn something from China's development path	18	10	26	22	17	13
Able to solve the common challenges some countries face in the process of development	13	09	17	15	13	09

Samples: 9,000 overseas

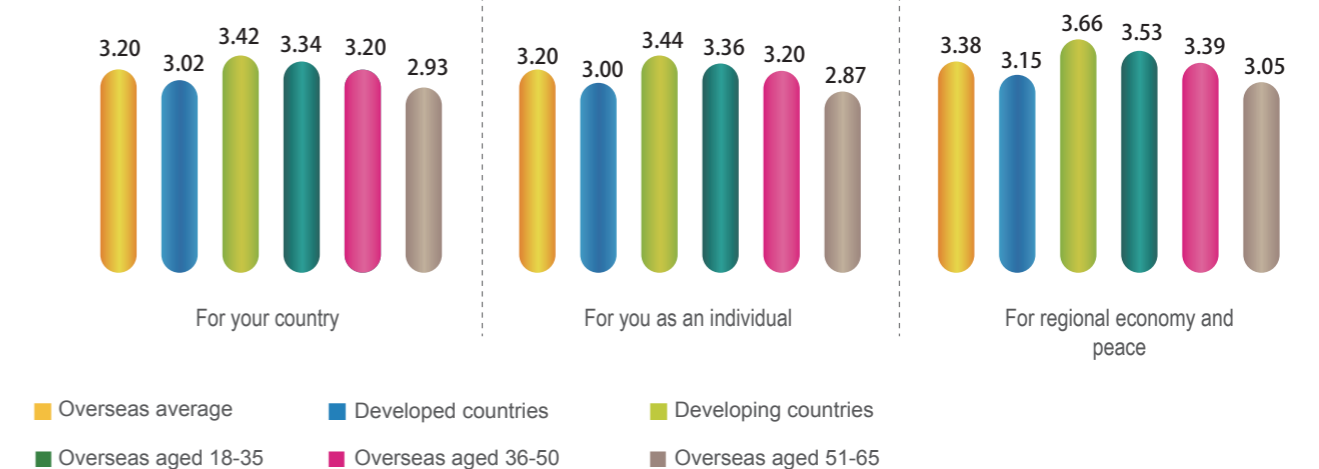
## Significance of the Belt and Road Initiative for both countries and individuals, regional economy and peace

On average, 15% of the overseas respondents had heard of China's Belt and Road Initiative: 16% in developed countries and 14% in developing countries.

Most of the respondents thought that the Initiative is significant for their countries and themselves, and for regional economy and peace. Those in developing countries and young people welcomed the Initiative more.

Figure 8 Evaluation of the Belt and Road Initiative

How do you view China's Belt and Road Initiative? (1-5 points)

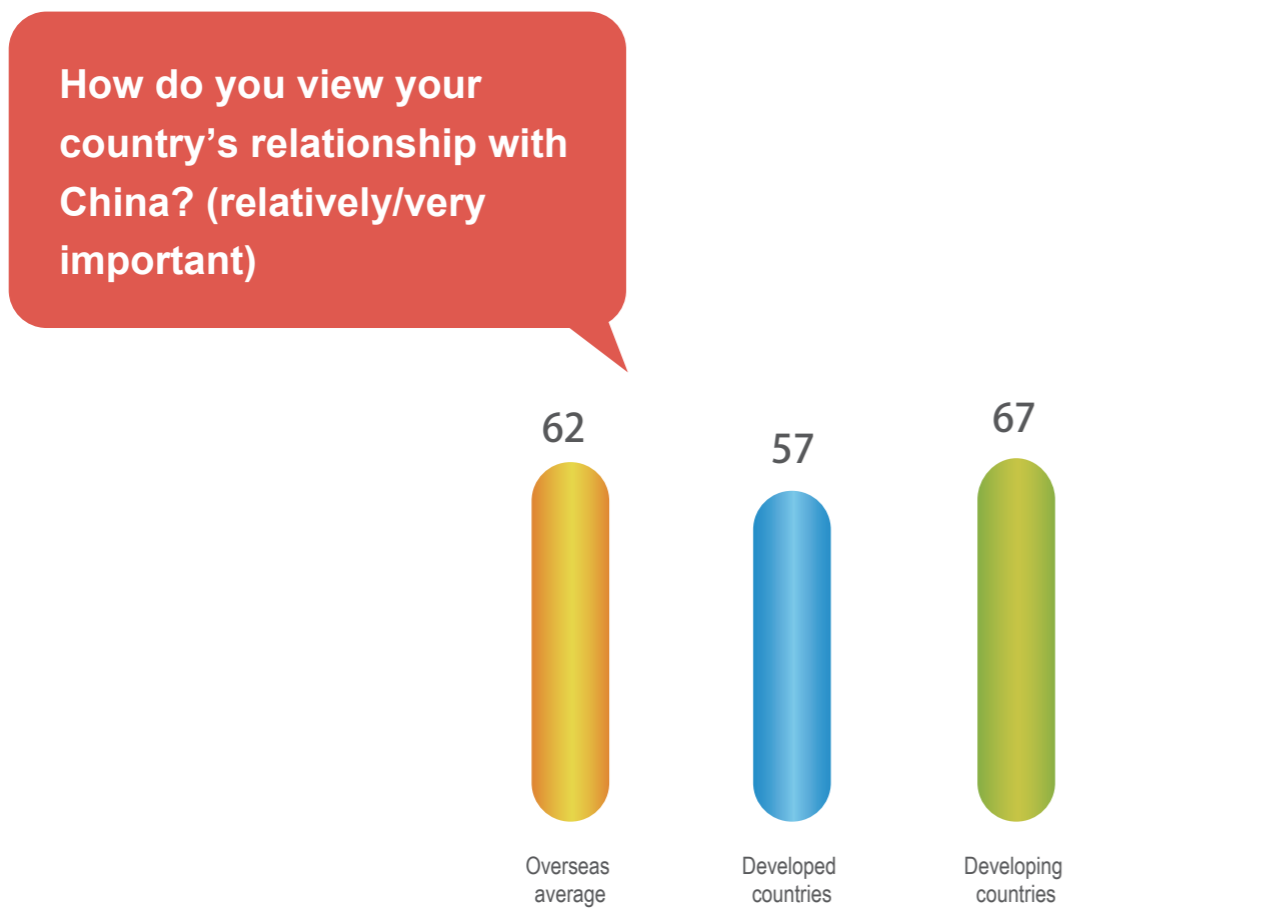


Samples: 1,332 overseas respondents who knew the Initiative

## Overseas respondents value diplomatic relations with China, and expect their better development in the future.

Compared with 2014, overseas respondents held a similar opinion on their countries' relations with China, and 62% of them thought it important to maintain a good relationship with China, and expected it to be further enhanced. Those in developing countries had a more positive attitude in this regard.

Figure 9 Evaluation of relations with China (%)



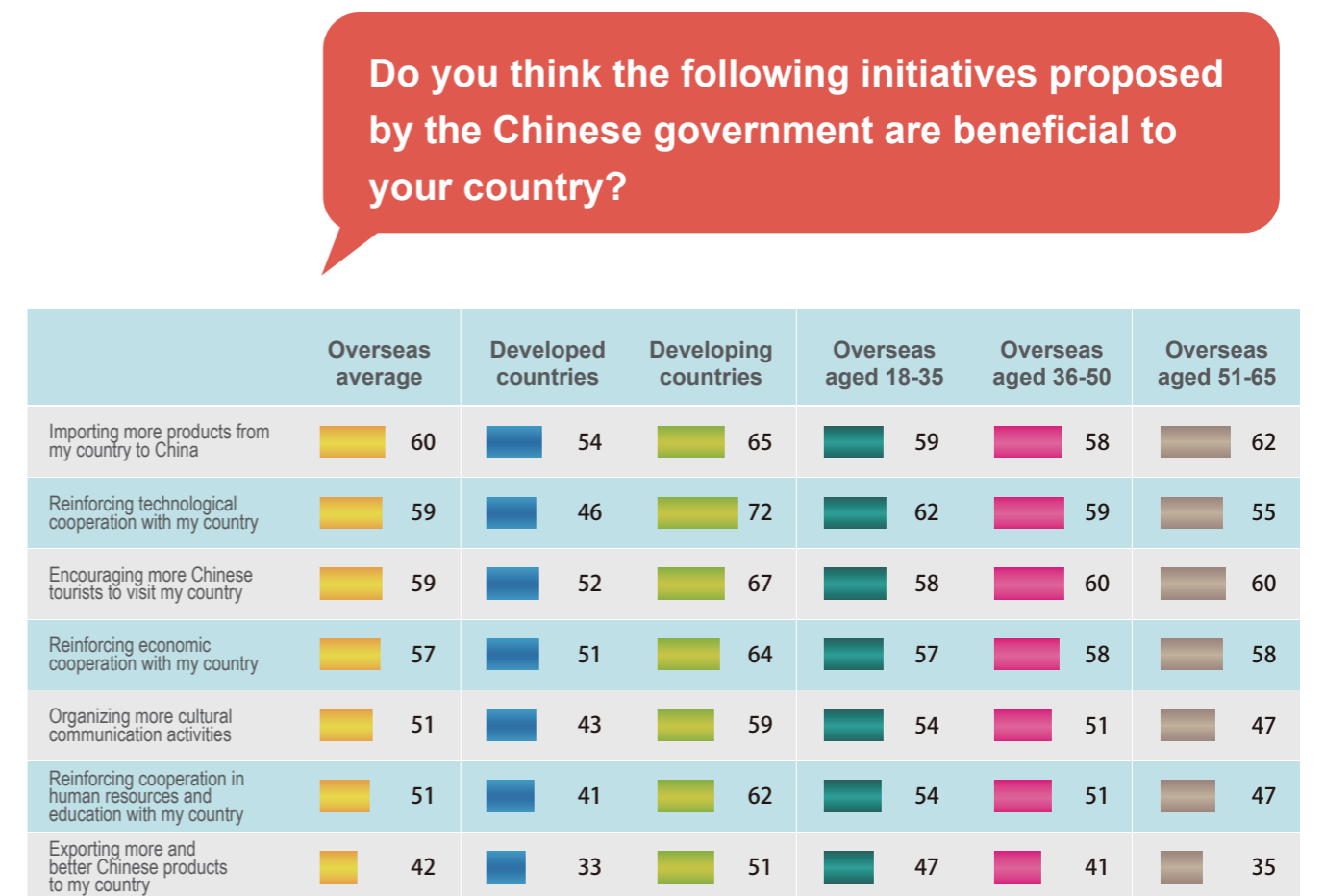
Samples: 9,000 overseas

## The cooperation initiatives proposed by China are widely recognized overseas.

On average, overseas respondents hailed most of the cooperation initiatives proposed by China as beneficial, the four most welcomed initiatives being "importing more products from my country to China" (60%), "reinforcing technological cooperation with my country" (59%), "encouraging more Chinese tourists to visit my country" (59%) and "reinforcing economic cooperation with my country" (57%).

Developing countries generally were positive toward their cooperation with China, and satisfied with the benefits of bilateral cooperation in science and technology. Young people were more positive about bilateral cultural communication, and cooperation in technological education, and welcomed more and better Chinese products to their countries.

Figure 10 Evaluation of the cooperation initiatives proposed by China (%)



Samples: 9,000 overseas

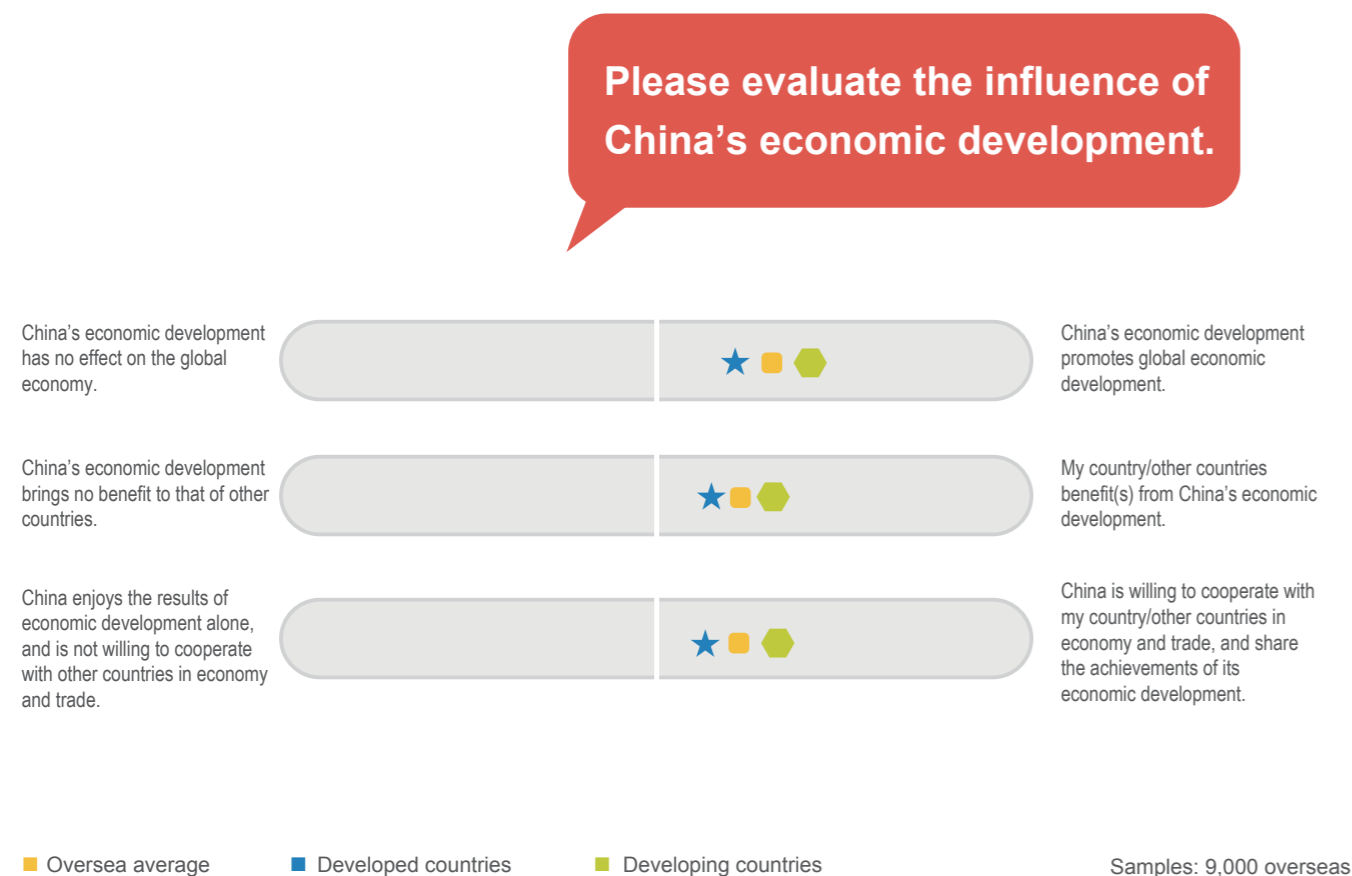


# China's Economic Image

## China's economic influence is widely recognized by the global community.

China's economic influence ranks second in the world, next only to that of the US. Overseas respondents overall thought that China's economic development promotes global economic development, and that China is willing to cooperate with other countries in economy and trade, and share the results of its economic development with them. Developing countries' comments on China's economic influence are more positive than those of developed countries.

Figure 11 Evaluation of China's economic influence

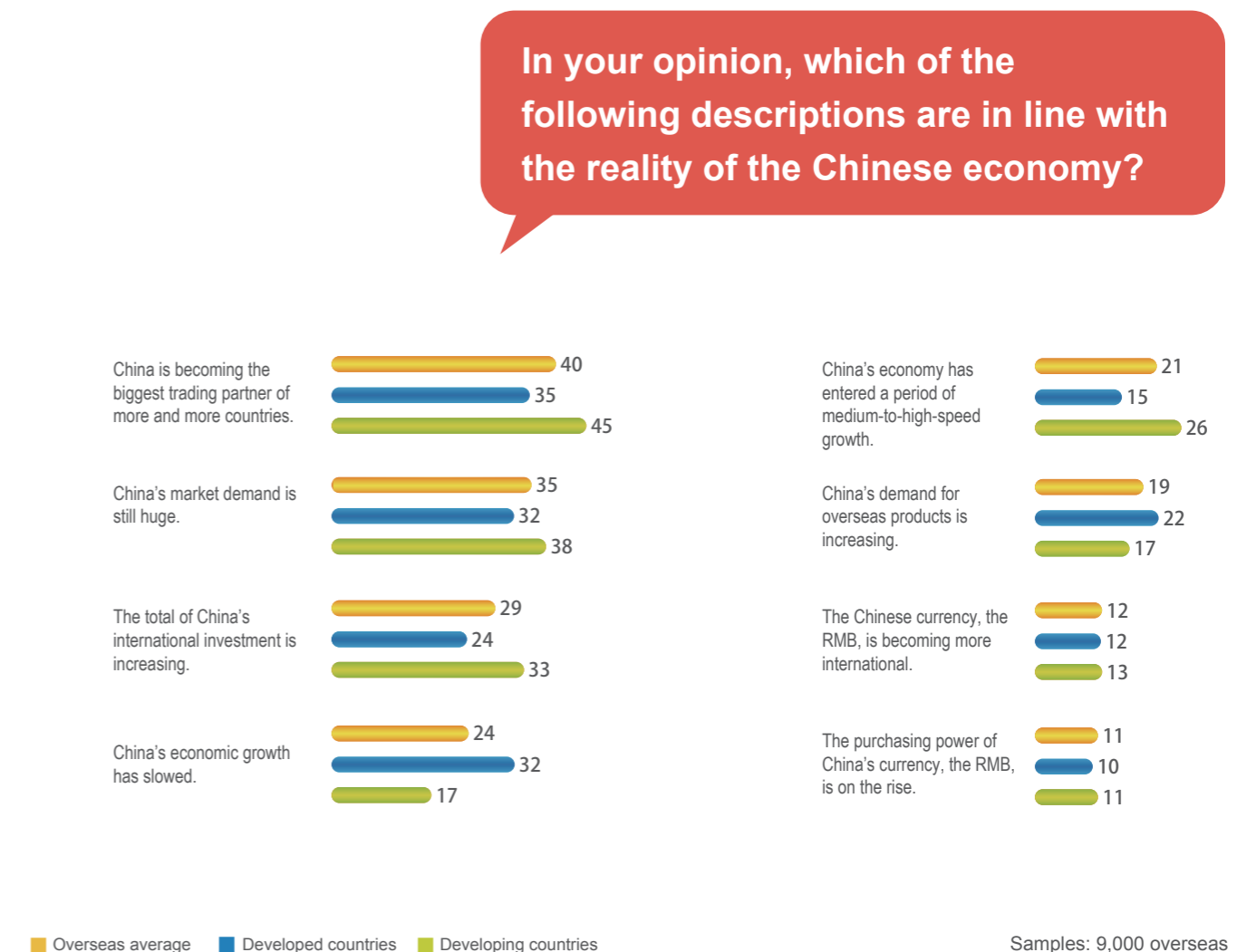


## China is generally believed to be becoming the biggest trading partner of more and more countries.

Regarding the reality of the Chinese economy, 40% of the overseas respondents believed that "China is becoming the biggest trading partner of more and more countries", 35% thought that "China's market demand is still huge", and 29% agreed that "the total of China's international investment is increasing".

Developing countries had a more positive evaluation of China's economy.

Figure 12 Evaluation of the Chinese economy (%)



## Chinese enterprises' entry and presence brings both opportunities and challenges to other countries.

In terms of opportunities, 36% of the overseas respondents believed that Chinese enterprises will bring along new capital and technologies, 32% held that they will increase employment opportunities, 21% said that they will increase local government tax revenue, and 19% thought that they will help promote the upgrading of the local industrial structure.

In terms of challenges, 36%, or 6 percentage points more than in 2014, feared that Chinese enterprises will influence the development of local firms and brands, and 24% held that their entry will affect the existing balance of the local industrial chain.

Figure 13 Evaluation of Chinese enterprises

How do you view Chinese enterprises' entry and presence in your country?

Opportunities %	VS 2014 %	Challenges %	VS 2014 %
Bringing along new capital and technologies 36	00	Influencing the development of local firms and brands 36	06
Increasing employment opportunities 32	00	Affecting the existing balance of local industrial chain 24	00
Increasing local government tax revenue 21	-4	Having an effect on local environment 21	-1
Promoting the upgrading of local industrial structure 19	-1	Exploiting local energy and other resources 20	-1

Samples: 9,000 overseas

## Xiaomi, WeChat and UC Web enjoy increasing popularity.

Lenovo, Huawei, Alibaba, ZTE and Haier are the five most famous Chinese brands among overseas respondents. Compared with 2014, Xiaomi, WeChat, UC Web and other technical brands gained in popularity, and the reputation of PetroChina also rose notably.

Figure 14 Overseas recognition of Chinese brands

Which of the following Chinese brands do you recognize?

Ranking	Bands	Change of Ranking	Ranking	Bands	Change of Ranking
1	Lenovo (computers)	--	16	Youku and Tudou (Internet)	-4
2	Huawei (IT equipment)	--	17	UC Web (Internet)	7
3	Alibaba (Internet)	2	18	Hainan Airline (air transport)	--
4	ZTE (IT equipment)	2	19	Midea (electrical appliances)	-3
5	Haier (electrical appliances)	-1	20	PetroChina (energy)	6
6	Air China (air transport)	-3	21	China Construction Bank (banking)	4
7	Xiaomi (IT equipment)	8	22	Cheetah Mobile (Internet)	1
8	WeChat (Internet)	5	23	Lining (sporting goods)	-4
9	Hisense (electrical appliances)	-2	24	Sinopec (energy)	-4
10	TCL (electrical appliances)	-2	25	BYD (automobiles)	-4
11	Bank of China (banking)	-2	26	JD.com (Internet)	1
12	Baidu (Internet)	-1	27	Shuanghui (foodstuffs)	-5
13	Tsingtao (beer)	1	28	Sohu (Internet)	1
14	ICBC (banking)	3	29	Tencent QQ (Internet)	-1
15	China Mobile (mobile communications)	-5	30	Sina (Internet)	--

Samples: 9,000 overseas

## Overseas image of Chinese brands has improved, especially in after-sales service.

Quality problems remain the factor hindering overseas development of Chinese brands, with 60% of the respondents complaining about this. Compared with 2014, overseas dissatisfaction with food safety, after-sales service and prices dropped by 6%, 13% and 9%, respectively.

The respondents in developed countries had more worries about Chinese brands than those in developing countries; young people were generally more positive toward Chinese products than older people, except that slightly more complained about the prices.

**Figure 15 Factors holding back overseas respondents from choosing Chinese products (%)**

Which of the below factors do you think would hold you back from choosing Chinese products?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Quality problems	60	63	57	54	62	68
Food safety problems	37	49	25	28	39	50
Poor after-sales service	29	31	27	25	30	35
High price	10	11	09	11	09	08

Samples: 9,000 overseas

## China's Culture, Science and Technology Images

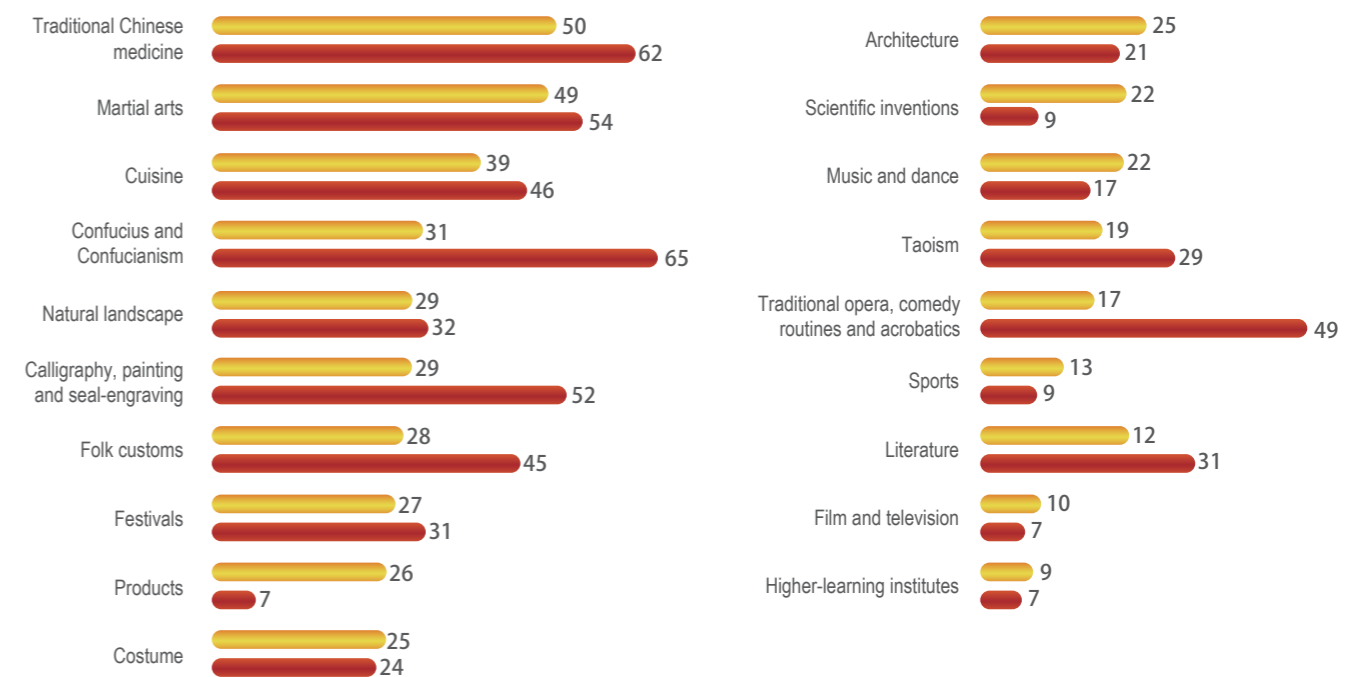
### Traditional Chinese medicine, martial arts and cuisine best represent Chinese culture.

Speaking of the elements that best represent Chinese culture, 50% of the overseas respondents chose traditional Chinese medicine, 49% ticked martial arts, and 39% marked off cuisine.

Overseas and Chinese respondents held different views in this regard. The former's recognition of Confucius and Confucianism, calligraphy, painting and seal-engraving, folk customs and traditional opera, comedy routines and acrobatics was much lower than that of the latter, while their recognition of Chinese products and scientific inventions was higher.

**Figure 16 Representative elements of Chinese culture (%)**

Which of the following aspects best represent Chinese culture?

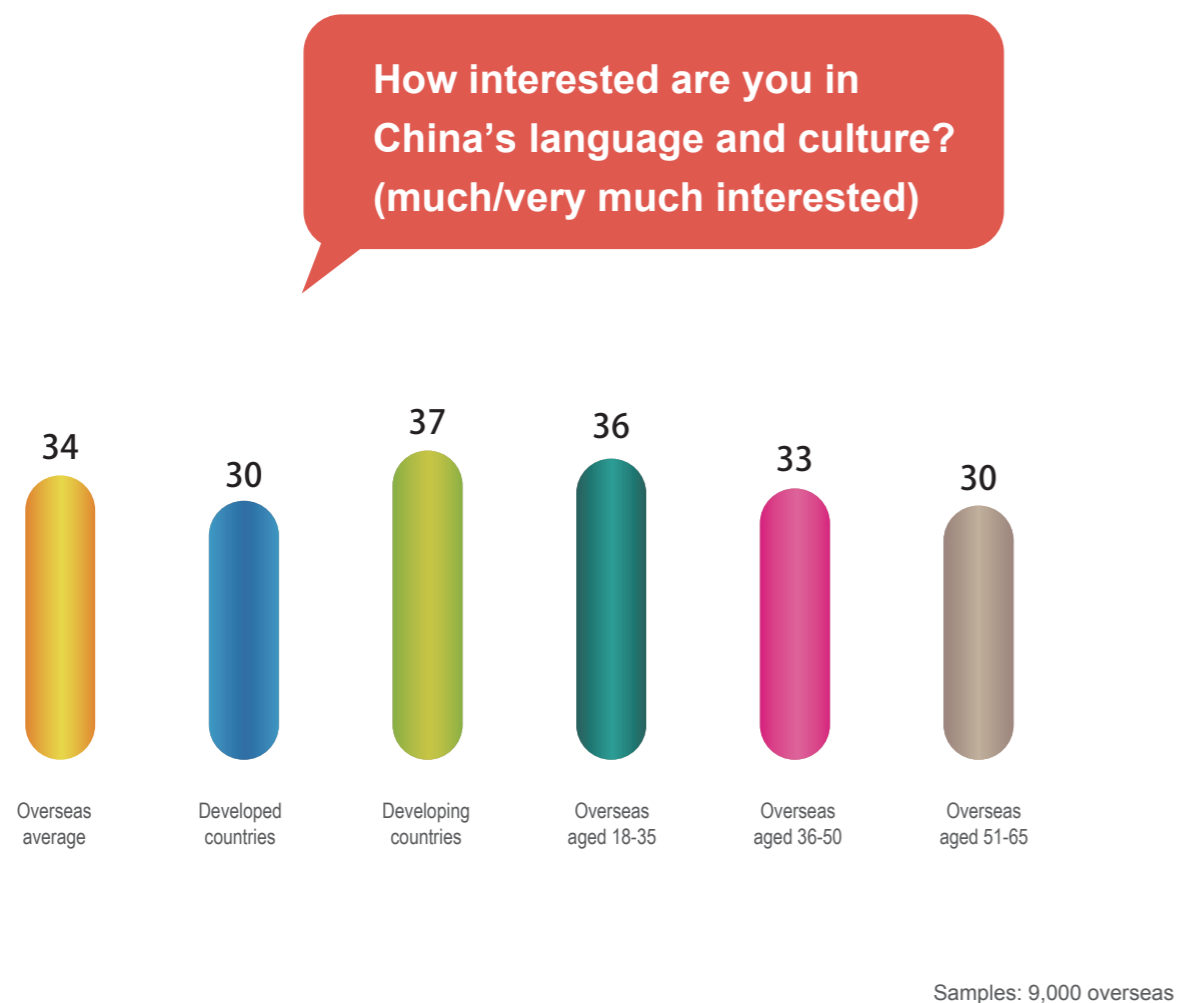


China Overseas average Samples: 9,500 global

## Over one-third of the overseas respondents are interested in China's language and culture.

On average, 34% of the overseas respondents were interested in China's language and culture, and the proportion was higher in developing countries than in developed ones, and higher among young people than among older people.

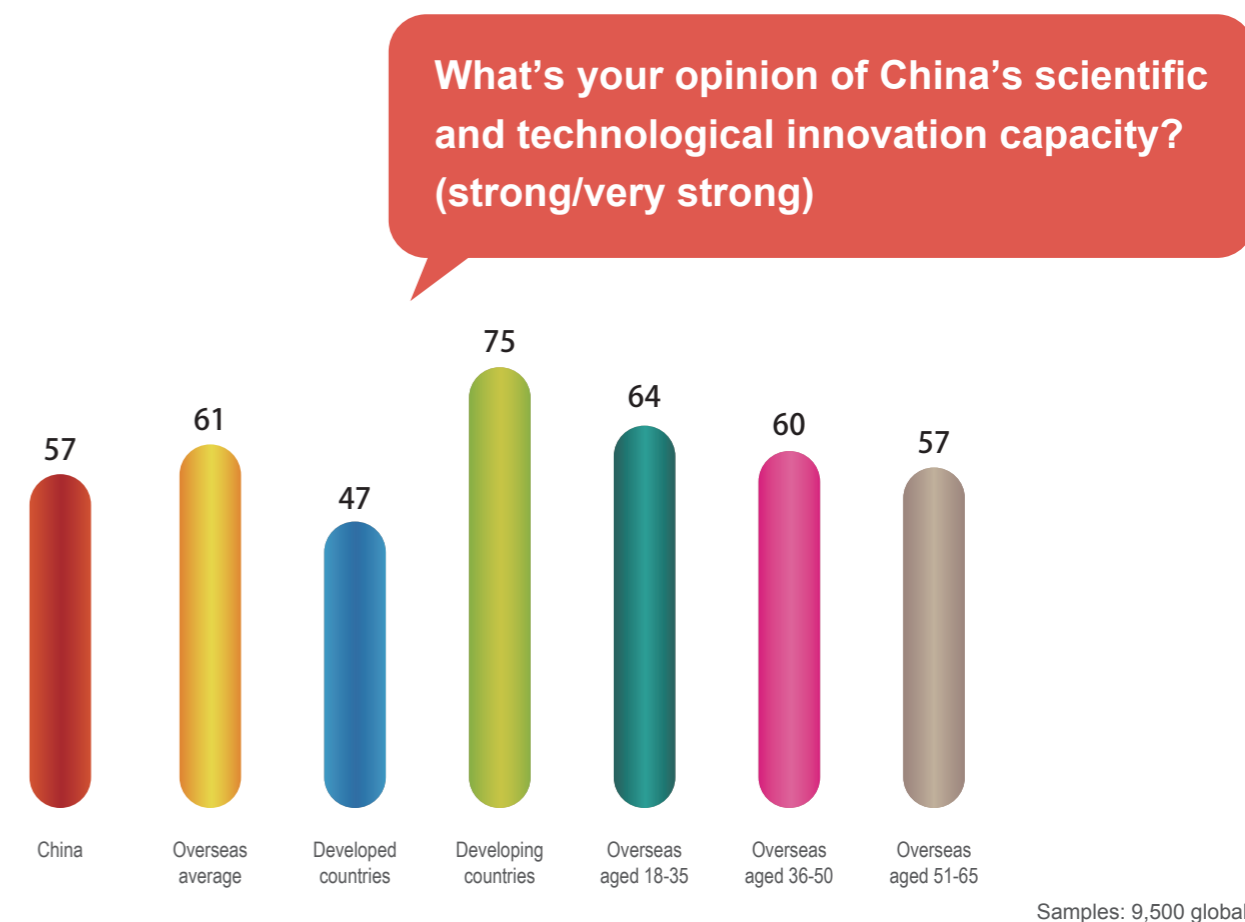
Figure 17 Interest in Chinese language and culture (%)



## More overseas respondents than Chinese affirm China's scientific and technological innovation capacity.

About 61% of the overseas respondents made a positive assessment of China's scientific and technological innovation capacity, which exceeded the 57% of the Chinese. The assessment is more positive in developing countries than in developed ones, and higher among young people than among older people.

Figure 18 Evaluation of China's scientific and technological innovation capacity (%)



## High-speed rail is China's best known scientific achievement.

Half of the overseas respondents knew about China's scientific achievements, with 21% affirming that China's high-speed railway network has reached over 19,000 km, more than any other country in the world. The awareness of China's high-speed rail achievement was higher in developing countries.

Figure 19 Recognition of China's scientific achievements

Do you know about China's scientific achievements in 2015?

Ranking	Scientific Achievements
1	China saw its high-speed rail extended to over 19,000 km, more than any other country in the world.
2	China launched a new-generation satellite for the Beidou Navigation Satellite System (BDS) into space.
3	Long March 6 and Long March 11 carrier rockets were launched respectively.
4	Chinese pharmaceuticals chemist Tu Youyou won the Nobel Prize for discovering artemisinin.
5	China launched the Dark Matter Particle Explorer (DAMPE) Satellite Wukong into space.

Samples: 9,500 global

## Global Issues

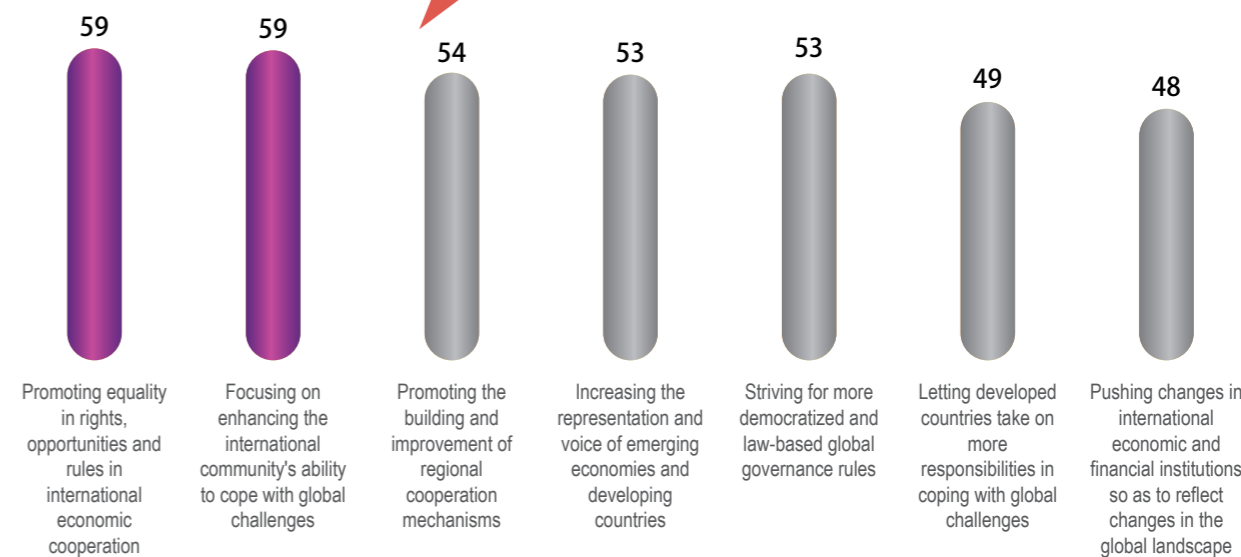
Global respondents generally think that the current international order is unjust and unfair, listing "promoting equality in rights, opportunities and rules in international economic cooperation" and "focusing on enhancing the international community's ability to cope with global challenges" as the most urgent tasks for global governance.

When asked about the current international order, 43% of the global respondents thought that it is unjust and unfair, another 43% gave a neutral answer, and only 14% said that it is just and fair.

Global respondents agreed that "promoting equality in rights, opportunities and rules in international economic cooperation" and "focusing on enhancing the international community's ability to cope with global challenges" should be the goals of global governance, with 59% supporters for both goals. Most people also supported "promoting the building and improvement of regional cooperation mechanisms", "increasing the representation and voice of emerging economies and developing countries" and "striving for more democratized and law-based global governance rules".

Figure 20 Evaluation of the goals of global governance (%)

Do you agree with the following goals of global governance? (relatively/completely)



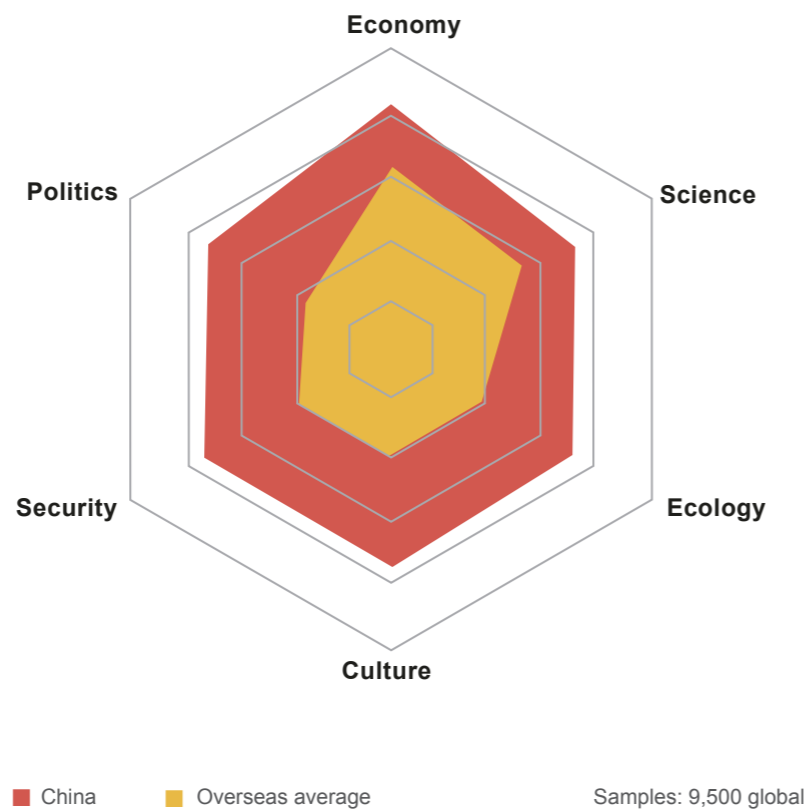
Samples: 9,500 global

## Overseas respondents expect China to play a bigger role in the global economy, and science and technology.

With regard to global governance, overseas respondents expected China to play a bigger role in the global economy (64%) and science and technology (58%).

Figure 21 Expectation of China's role in global governance

In which of the following aspects of global governance do you expect China to play a bigger role?



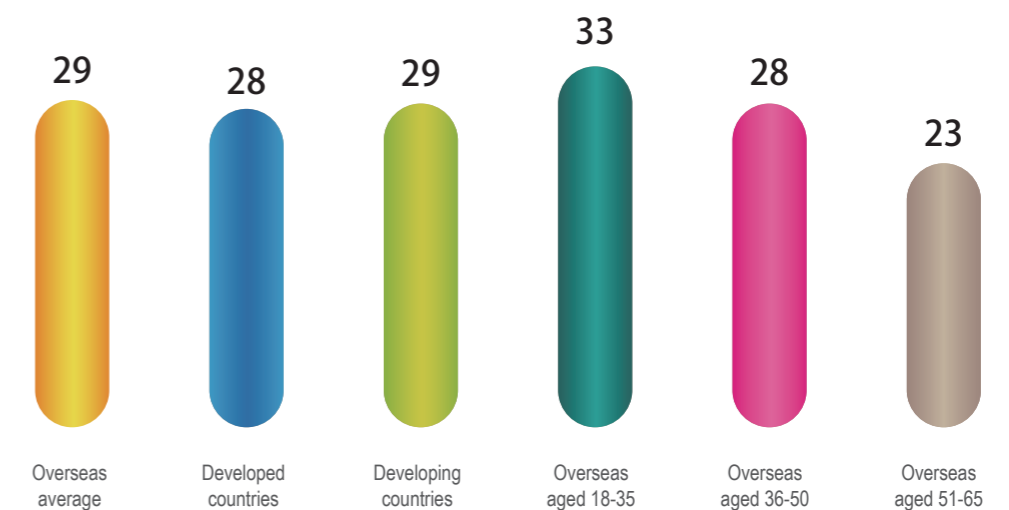
## Channels for Overseas People to Know about China

### Nearly 30% of the overseas respondents know about China.

On average, 29% of the overseas respondents said they have some or a lot knowledge about China, which was higher than in 2014. Many of them were young people.

Figure 22 Knowledge about China (%)

How much do you know about China? (some/a lot knowledge)

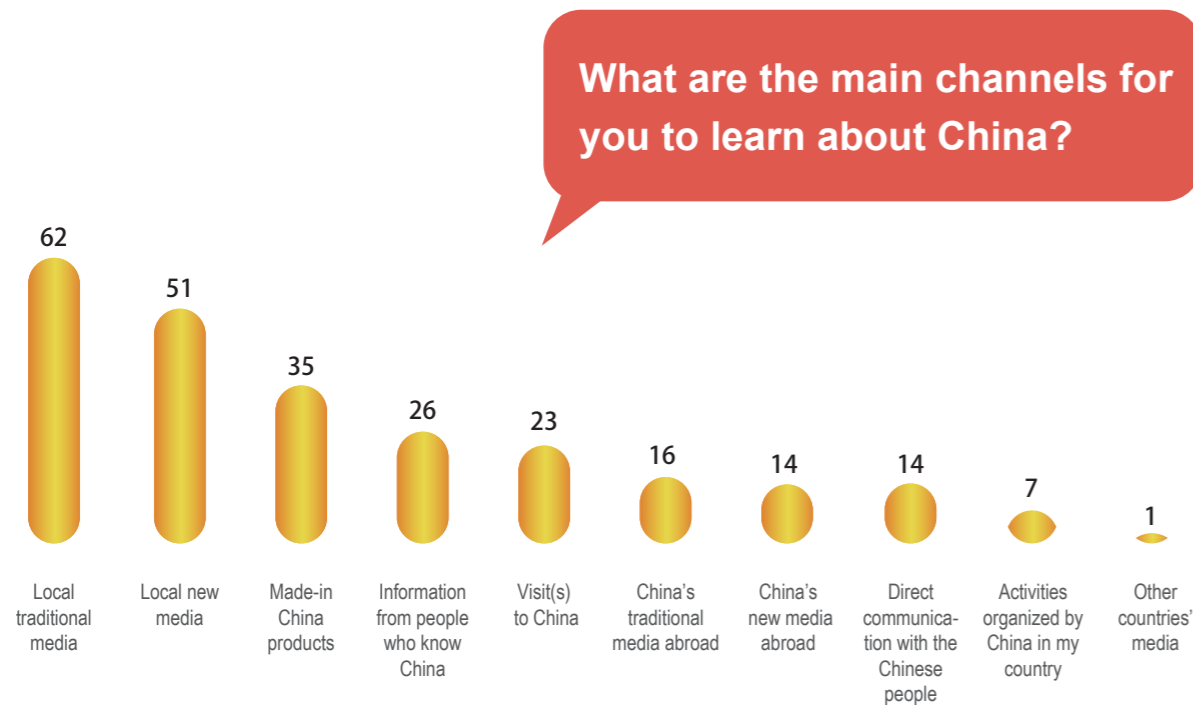


## Local media and Chinese products are the main channels for overseas people to learn about China.

Among overseas respondents, local traditional and new media, and Chinese products were the main channels for them to get to know about China. The proportions were 62%, 51% and 35%, all higher than in 2014.

Young people preferred new media, while older people favored traditional media to learn about China.

Figure 23 Main channels for learning about China (%)



Samples: 9,000 overseas

## China's culture and science and technology are what overseas people want to learn the most about through Chinese media.

Overseas people expected to learn about China's culture (39%) and science and technology (37%) through Chinese media. Their interests in China's economy and history were also relatively high.

Developing countries generally had more interest than developed countries in learning about China through Chinese media, except in politics and prominent social topics.

Apart from culture and science and technology, young people were most interested in China's economy, while older people were more attracted by China's history.

Figure 24 Information about China through Chinese media (%)

What do you want to know more about China through the Chinese media?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Culture	39	33	44	38	39	39
Science and technology	37	23	51	40	37	31
Economy	31	26	36	32	31	30
History	31	27	36	30	32	33
People's life	27	21	32	26	27	28
Politics	20	20	20	20	21	21
Education	20	11	29	23	19	15
Entertainment	18	11	26	23	18	10
Hot social topics	17	17	16	18	16	17
Military affairs	17	15	18	18	16	16
Sports	13	08	17	14	13	10

Samples: 9,000 overseas

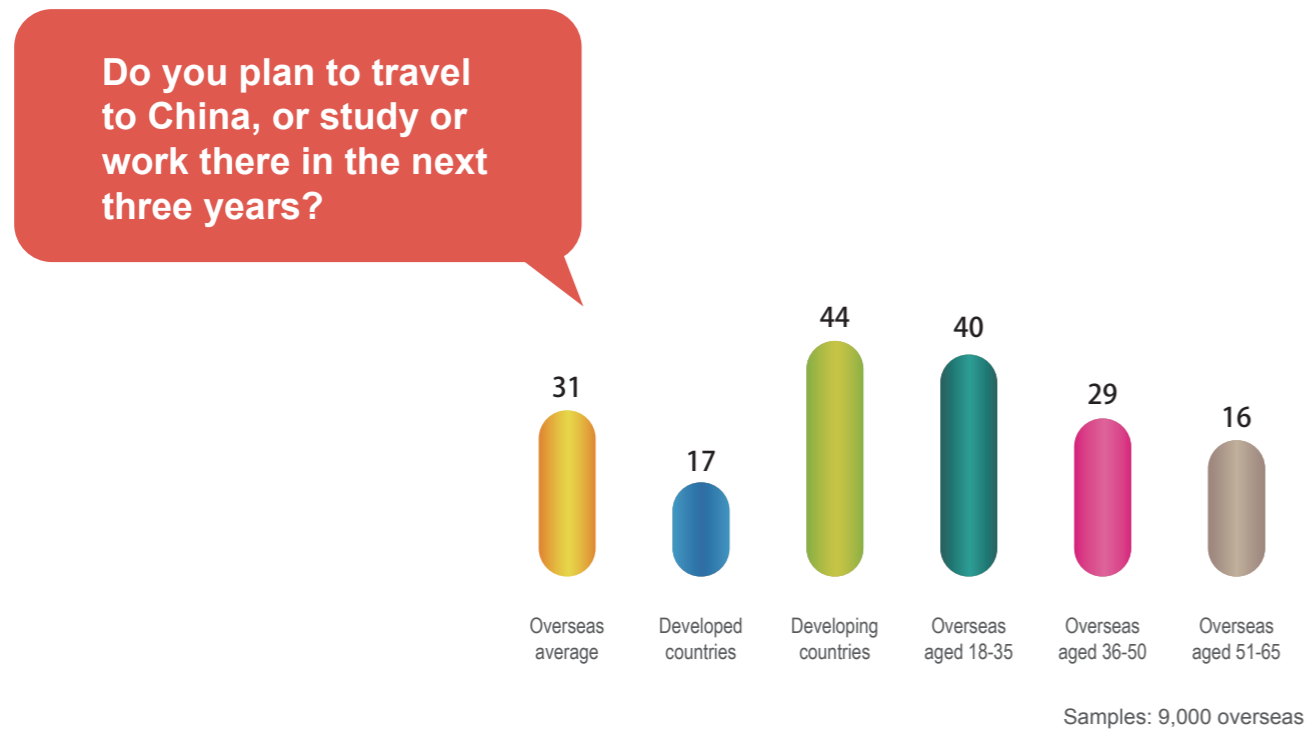
# Interest in Visiting China

## More overseas people plan to visit China in the next three years.

Of the overseas respondents, 31% planned to study, work or travel in China in the next three years. It was 26% in 2014.

About 44% of the respondents in developing countries wanted to visit China, while the proportion was 17% in developed countries. Among different age groups, the proportions of people planning to come to China was 40% for those aged 18-35, 29% for those aged 36-50 and 16% for those aged 51-65.

Figure 25 Planning to visit China in the next three years (%)

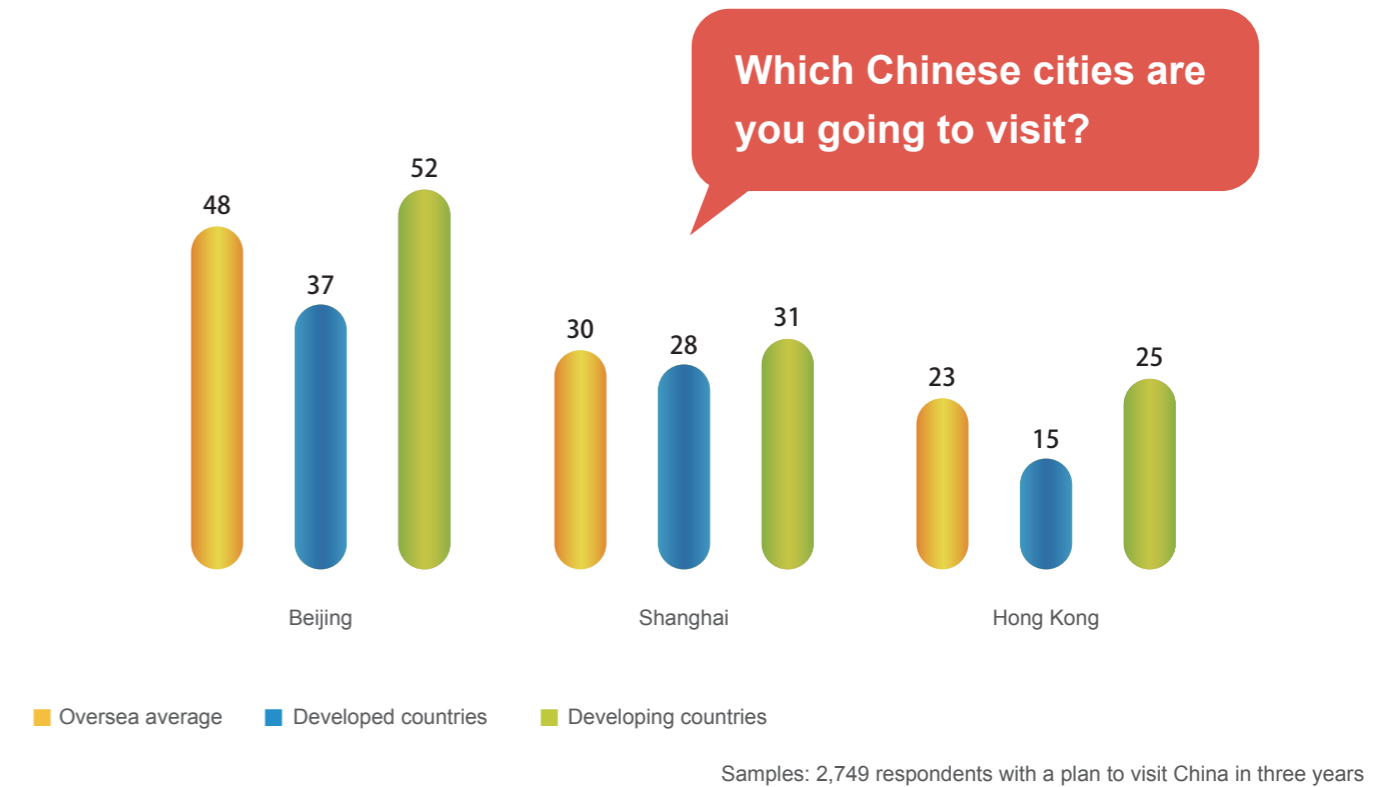


## Beijing, Shanghai and Hong Kong are the Top Three destinations among Chinese cities.

Beijing (48%), Shanghai (30%) and Hong Kong (23%) were the three most favored Chinese cities among overseas respondents. This was about the same as in 2014.

Compared with 2014, overseas respondents on average showed a little less interest in Shanghai, (dropping from 35% to 30%) and more interest in Beijing (rising from 34% to 37% in developed countries).

Figure 26 Top Three Chinese cities to visit (%)





# About the Platform of China's National Image Survey

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

## 1.Special features of the platform



## 2.Content of the survey

### Basic topics:

- Global survey of China's national image and its image in politics, economy and culture, the image of the Chinese people, etc.
- Overseas surveys of the images of Chinese brands: recognition and popularity.

### Optional topics:

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

## 3.Methodology of the survey

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

## 4.Institutions involved

**Center for International Communication Studies**  
**China Foreign Languages Publishing Administration**

[www.chinacics.org](http://www.chinacics.org)

The Center for International Communication Studies under the China Foreign Languages Publishing Administration was established in 2004. It is a state-level think-tank specializing in studies of international communication and China-related international news, with nearly 100 Chinese researchers and foreign experts.

**Main offices:** Research Office of Communication Strategy, General Information Research Office, International Media Research Office, Translation Research Office, Secretariat of the Translators Association of China, Research Office of National Image Communication and Evaluation, Research Office of the "China Threat", Research Office of the Image of the Communist Party of China in the International Media, Center for the Monitoring and Assessment of China-related International News, and Research Office of Overseas Publications and Related Literature.

**Research focus:** The center is renowned for its studies on practical subjects and corresponding suggestions. It is competitive in designing global communication strategy and policy planning, assessment of international opinions, respondent survey and evaluation of communication effects. It provides policy advice and strategic research services for the central government, business community, public service institutions and non-governmental organizations. It has undertaken a number of major projects and key research programs funded by the National Social Science Foundation, including "Research on the 'China Threat' in the Global Media and Countermeasures", "Studies on the Designing of China's Image in International Communication", "Strategic Studies on Enhancing China's International Communication Capability" and "Studies on China's National Image and Influence in Africa".

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

**Regular events:** The center is the organizer of such high-end academic conferences as "Seminar on International Communication", "National Workshop on Translation and Interpretation", "Seminar on the Communication of China's Political Discourse" and "International Seminar on the Chinese Dream". It works with other Chinese and international professional agencies to build joint research bases and collaborative innovation centers. It publishes an annual report on the global survey of China's national image.

#### Millward Brown ACSR

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

#### Lightspeed GMI

Quality-seeking researchers, marketers and brands choose Lightspeed GMI as their trusted global partner for digital data collection. Our innovative technology, proven sampling methodologies and operational excellence facilitate a deep understanding of consumer opinions and behaviour. From award-winning survey engagement to fieldwork management, we add value at every stage of the research process.

Focusing on local market knowledge, Lightspeed GMI's proprietary panels deliver access to more than four million online research respondents with unparalleled quality, capacity and targeting. Our comprehensive product suite offers the tools and services needed to generate dependable research results across the consumer, B2B, financial and healthcare business segments.

These, along with a full suite of data collection services including mobile surveys, custom panels and communities, specialty panels and observed digital behaviour and ad tracking, provide the industry's most complete and highest-quality portfolio for conducting online research.

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