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2018 CHINA NATIONAL IMAGE GLOBAL SURVEY

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KANTAR

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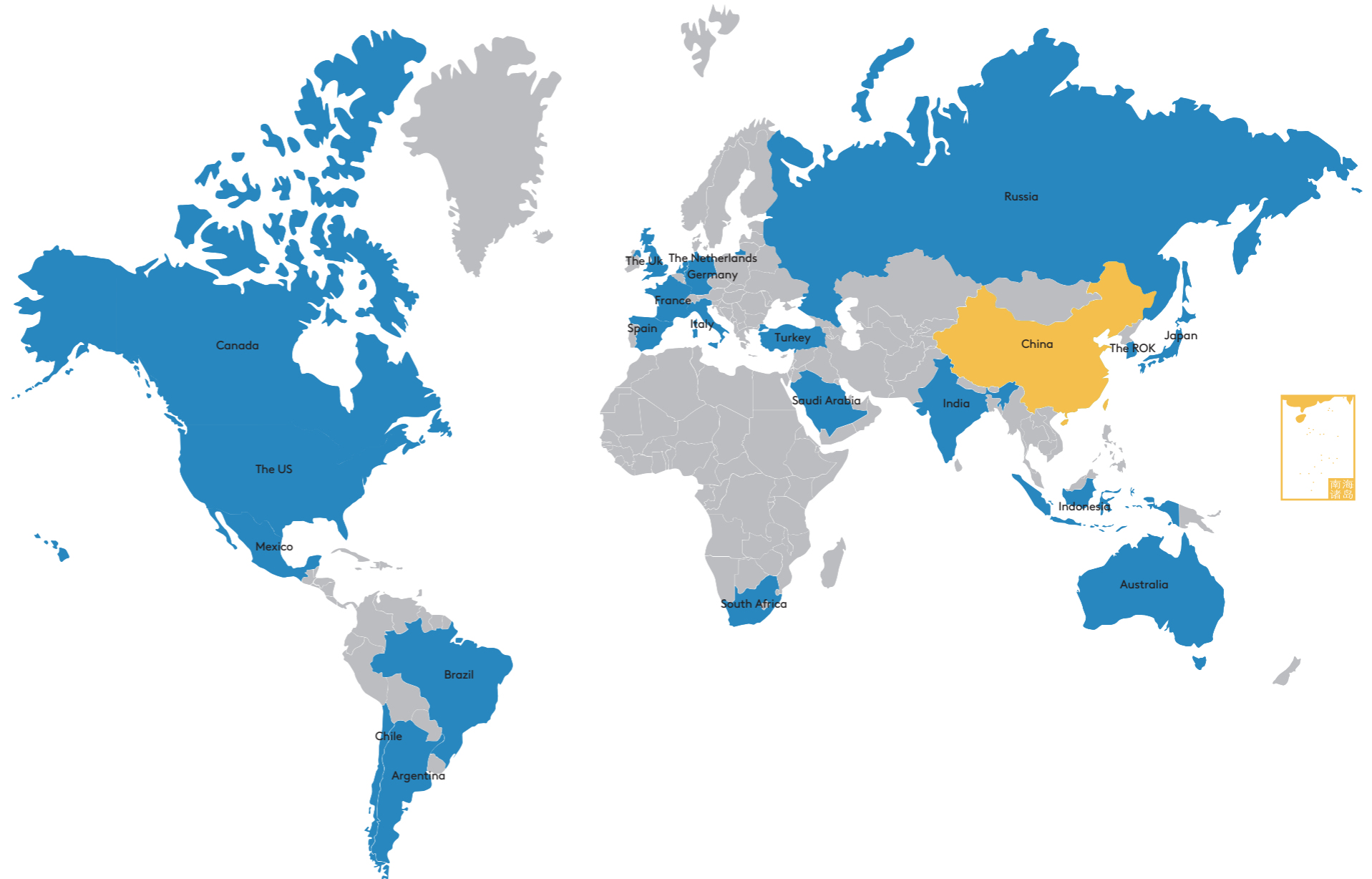
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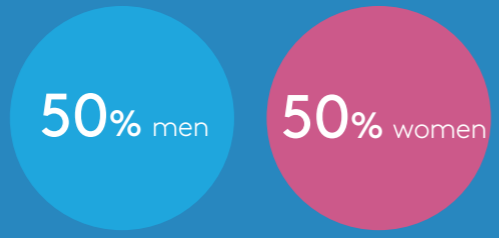
Part 1: About Survey 2018

From May to July 2018, the Academy of Contemporary China and World Studies (the former Center for International Communication Studies under the China Foreign Languages Publishing Administration) and Kantar jointly conducted the sixth global survey of China's national image.

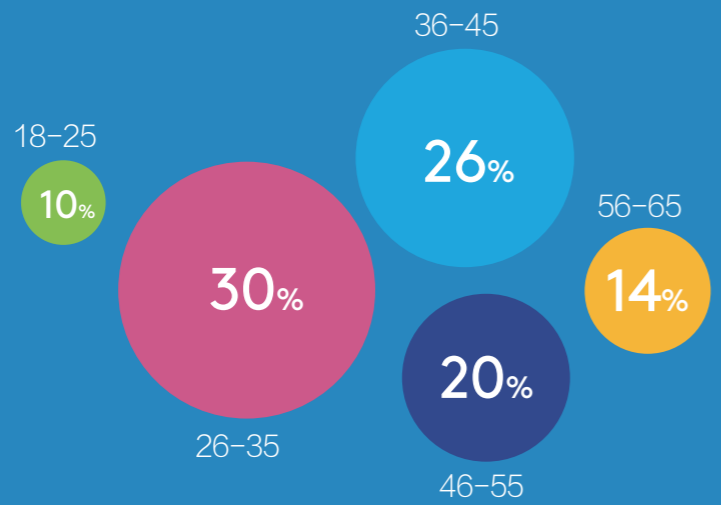
The survey interviewed citizens of 22 countries, covering Asia (China, Japan, South Korea, India, Turkey, Indonesia and Saudi Arabia), Europe (the UK, France, Germany, Italy, Russia, Spain and the Netherlands), North America (the US, Canada and Mexico), South America (Brazil, Argentina and Chile), Oceania (Australia) and Africa (South Africa). With 500 respondents from each country, a total of 11,000 respondents selected from the global panel of Kantar were included in this survey. The survey was conducted by using online questionnaires and strictly followed the international standards for online polls. To ensure the accurate representation of the countries involved, the samples were local residents aged between 18 and 65.



Ratio of gender of the respondents



Ages of the respondents



Education background of the respondents

Education	Overseas average	Developed countries	Developing countries	China
Junior high school or below	05	06	06	00
Senior high school or vocational school	24	30	19	07
College	18	21	14	27
University	34	27	41	60
Postgraduate or above	17	15	19	06

Main findings of this survey:



The overall impression of China's image is steadily improving. China's performance in domestic and foreign affairs is being better appreciated, and its domestic governance is attracting better recognition.



Its participation in global governance as regards science and technology, economy and culture is more positively appreciated overseas.



People overseas have higher expectations concerning China's participation in all aspects of global governance. It is widely agreed that China is becoming the biggest trading partner of more and more countries, and that its economy will maintain high-speed growth.



China has attained enormous success since 1949, particularly since adopting reform and opening up in the late 1970s, which has contributed to global development.



China's proposal of building a community with a shared future for humanity is believed to have a positive influence on individuals, countries and mankind as a whole. The positive influence of the Belt and Road Initiative on the regional and global economies is attracting more attention.



China's technological innovation capacity is becoming better recognized, with an improved image attached to Chinese products and Internet enterprises. Quality problems remain the major factor hindering the overseas development of Chinese brands.

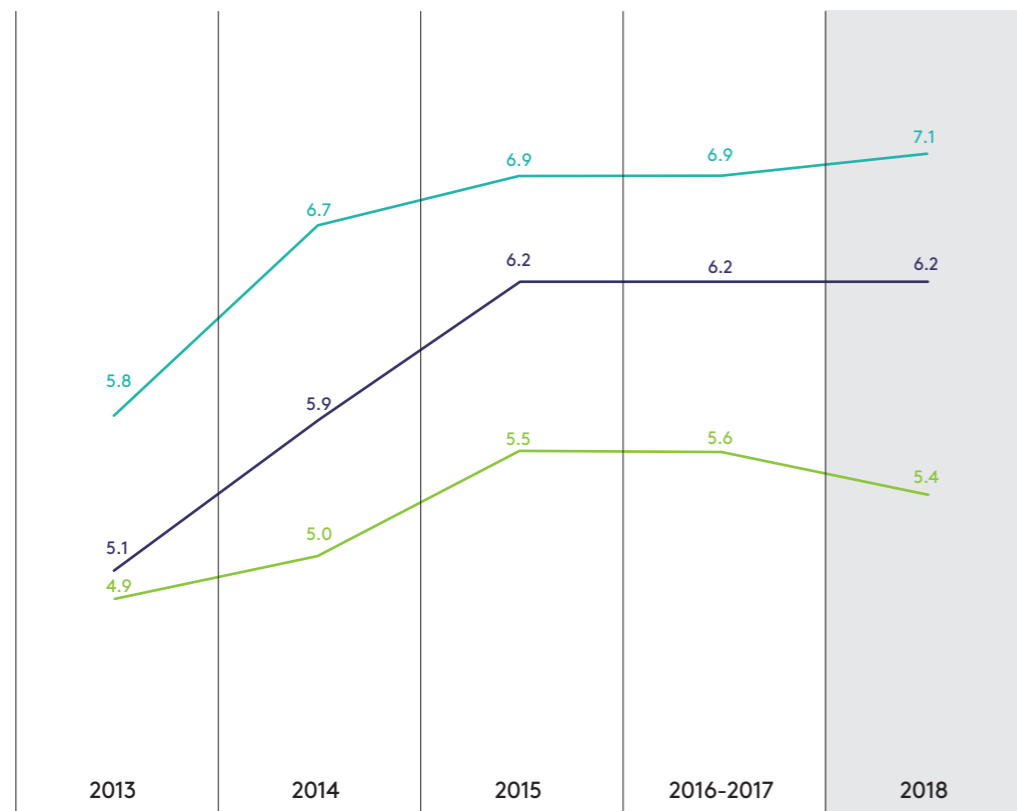
Part 2: Overall Image and Influence

China's overall image is steadily improving internationally, particularly the images of other developing countries.

China scored 6.22 on the 10-point system concerning its overall image, the same score as found by the previous survey. Generally, other developing countries have better impressions of China than developed countries, with their scores in this regard 0.2 point higher than in the previous survey, maintaining a slight upward curve in recent years.

Figure 1 Overall image of China

Please indicate your general impressions of the following countries. (1-10 points)



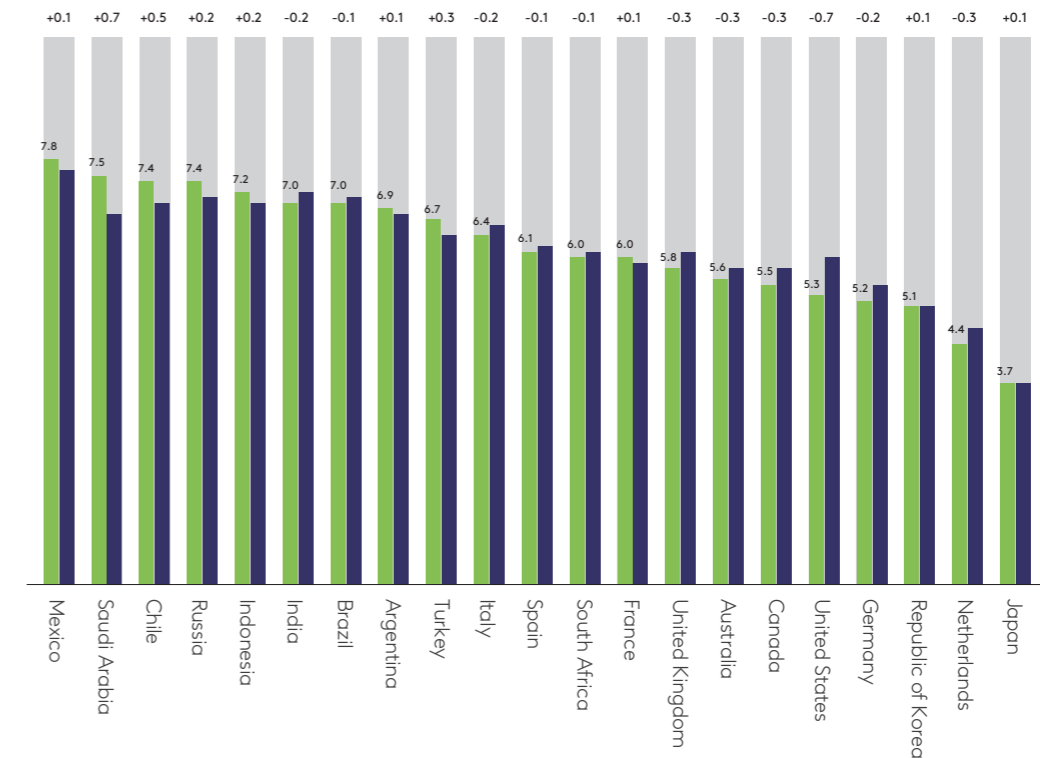
Overseas average Developed countries Developing countries Samples: 10,500 overseas

Mexico, Saudi Arabia, Chile, Russia and Indonesia have the best impressions of China.

Mexico (7.8 points), Saudi Arabia (7.5 points), Chile (7.4 points), Russia (7.4 points) and Indonesia (7.2 points) had the best impressions of China. Compared with the previous survey, the five countries whose scores concerning China rose the most were Saudi Arabia (up 0.7 point), Chile (up 0.5 point), Turkey (up 0.3 point), Russia (up 0.2 point) and Indonesia (up 0.2 point). Generally, developing countries outnumbered developed countries for improved impressions of China.

Figure 2 Overall image of China

Please indicate your general impressions of the following countries. (1-10 points)



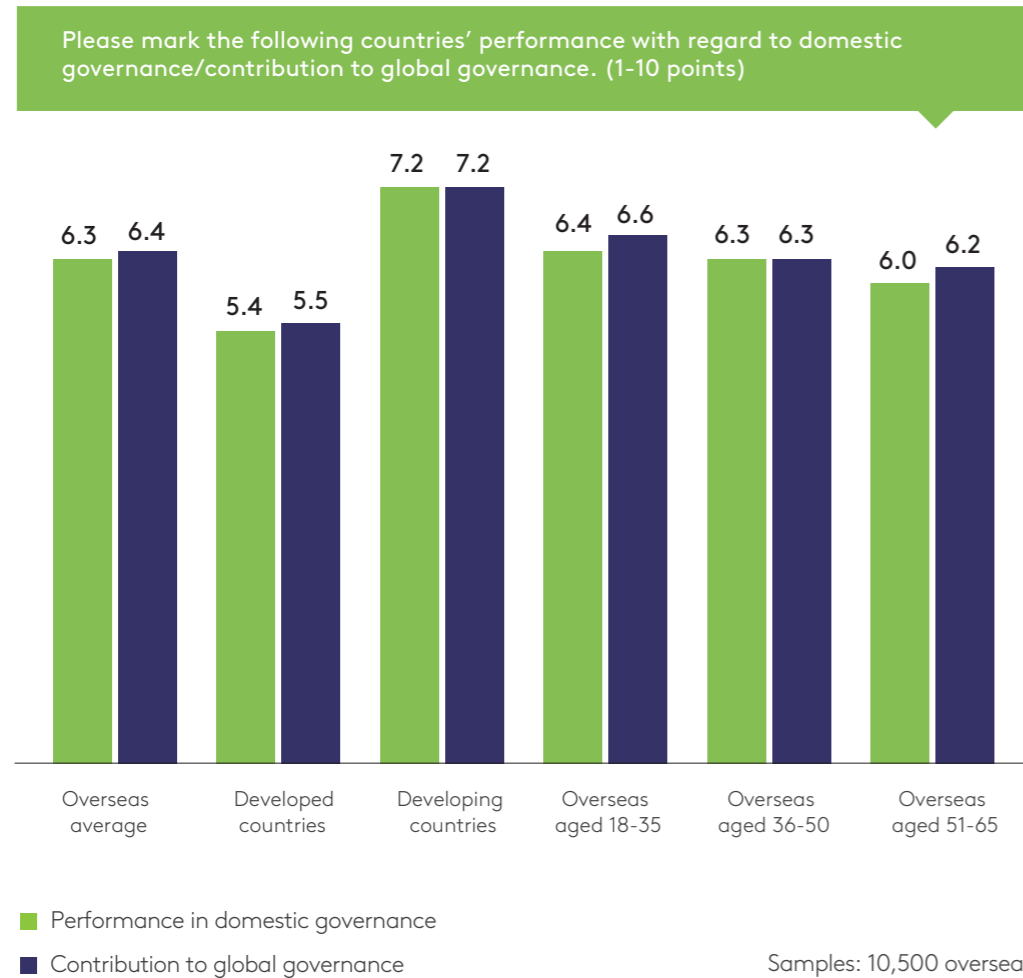
2018 2016-2017 Samples: 10,500 overseas

China is highly appraised for its performance in domestic and global affairs, and gives better impressions of its domestic governance.

China got a score of 6.4 points in terms of its contribution to global governance, and 6.3 points for its performance in domestic affairs, with the recognition of its ability to handle domestic affairs up by up 0.1 point.

Compared with average overseas impressions, developing countries had more positive comments on China's contribution to global affairs and performance in domestic governance. The younger the overseas respondents, the higher the scores.

Figure 3 Evaluation of China's performance in domestic governance and contribution to global governance



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

The top three countries with the biggest influence in global affairs were the US, China and Russia. This was the same as was found by the 2014, 2015 and 2016-2017 surveys, showing that in the eyes of the respondents there was not much change in these countries' performance in global affairs.

Compared with the previous survey, the UK and France both had improved rankings by rising to fourth and fifth, respectively.

Figure 4 Top five countries with the biggest influence in global affairs

Please rank the five countries that have the biggest influence in global affairs.



Samples: 11,000 global

As regards China's participation in global governance, overseas respondents think highly of China in the fields of science and technology, economy and culture.

Regarding China's participation in global governance, the international community thinks highly of China in the fields of science and technology (63%), economy (60%) and culture (53%). Compared with developed countries, developing countries had a better impression of China in all aspects of global governance.

Overseas youth had better comments on China's participation in global governance as regards science and technology, politics, security and ecological conservation, while people aged 51-65 had better impressions of its participation in cultural programs.

Figure 5 Evaluation of China's performance in global governance

Evaluation of China's performance in global governance (%)

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Science and technology	63 / 65	53 / 55	75 / 76	65 / 67	62 / 64	62 / 63
Economy	60 / 64	51 / 55	73 / 74	60 / 65	60 / 64	61 / 63
Culture	53 / 57	45 / 48	63 / 66	53 / 59	52 / 56	55 / 54
Politics	36 / 44	26 / 33	48 / 55	38 / 47	36 / 43	34 / 38
Security	36 / 44	28 / 34	45 / 54	39 / 48	36 / 42	33 / 38
Ecology	29 / 34	21 / 25	38 / 45	31 / 42	28 / 32	24 / 26

■ 2018 ■ 2016-2017

Samples: 10,500 overseas

Regarding China's participation in global governance, overseas respondents expect the country to play a bigger role in the fields of science and technology, and economy.

Compared with the previous survey, the international community had higher expectations of China in all aspects of global governance. About half of them wanted to see China playing a bigger role in the fields of science and technology, and economy. The developing countries wished China to play a bigger role in economy (61%) and science and technology (59%), while developed countries scored economy (42%) and culture (39%) in this regard.

Figure 6 Expectation of China playing a bigger role in more aspects of global governance

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

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Science and technology	50 / 40	42 / 34	59 / 47	48 / 38	50 / 41	53 / 43
Economy	48 / 40	36 / 29	61 / 51	48 / 41	48 / 39	48 / 38
Culture	37 / 33	39 / 38	35 / 28	34 / 29	37 / 34	42 / 40
Politics	26 / 22	24 / 22	28 / 21	24 / 28	26 / 22	29 / 27
Security	25 / 19	23 / 19	27 / 20	24 / 17	24 / 19	27 / 23
Ecology	23 / 17	20 / 14	28 / 19	24 / 18	24 / 17	22 / 14

■ 2018 ■ 2016-2017

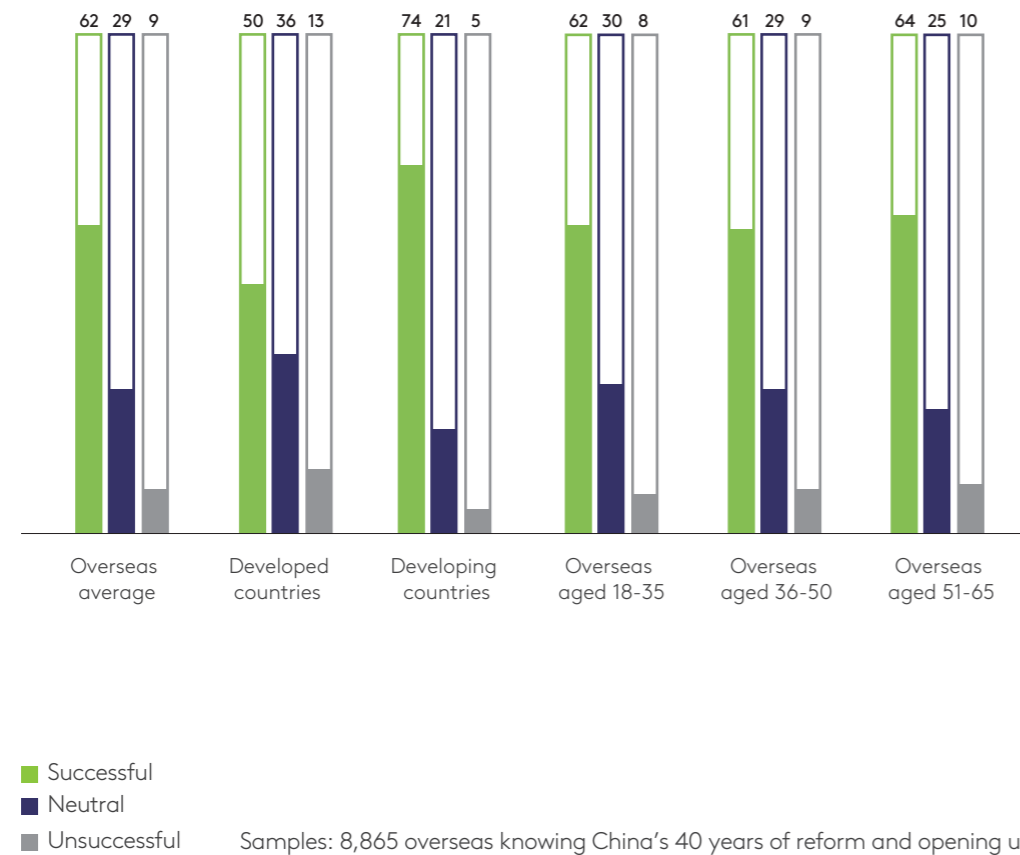
Samples: 10,500 overseas

Overseas respondents believe China's 40 years of reform and opening up to have been successful and positive for global development.

62% of the overseas respondents thought that reform and opening up has profoundly changed both China and the rest of the world, and 74% of the respondents in developing countries praised China's achievements in reform and opening up over the past four decades.

Figure 7 General impression of China's 40 years of reform and opening up

The year 2018 marked the 40th anniversary of China's introduction of its reform and opening-up policy. What is your general impression of China's reform and opening up? (%)

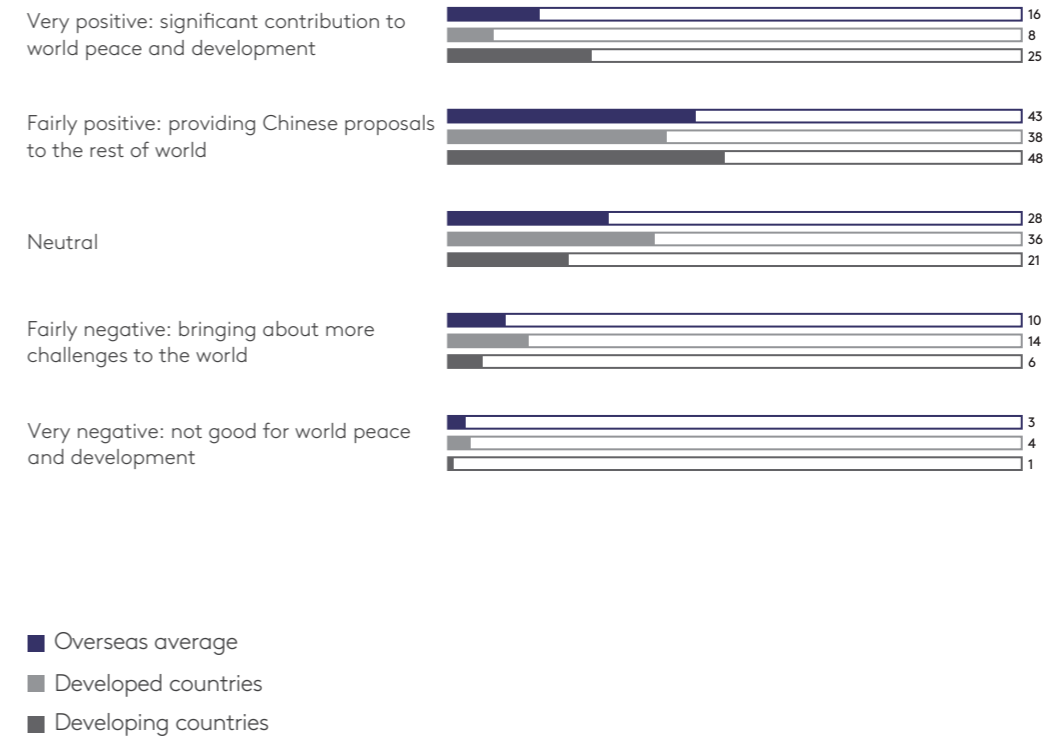


The international community thinks China's 40 years of reform and opening up have had a positive influence on the rest of the world.

Among overseas respondents familiar with China's reform and opening up, 59% thought it was positive for the rest of the world, and a great contribution to world peace and development. 73% of the respondents in developing countries, more than in developed countries, acknowledged its success and positive influence.

Figure 8 Influence of China's 40 years of reform and opening up on the rest of the world

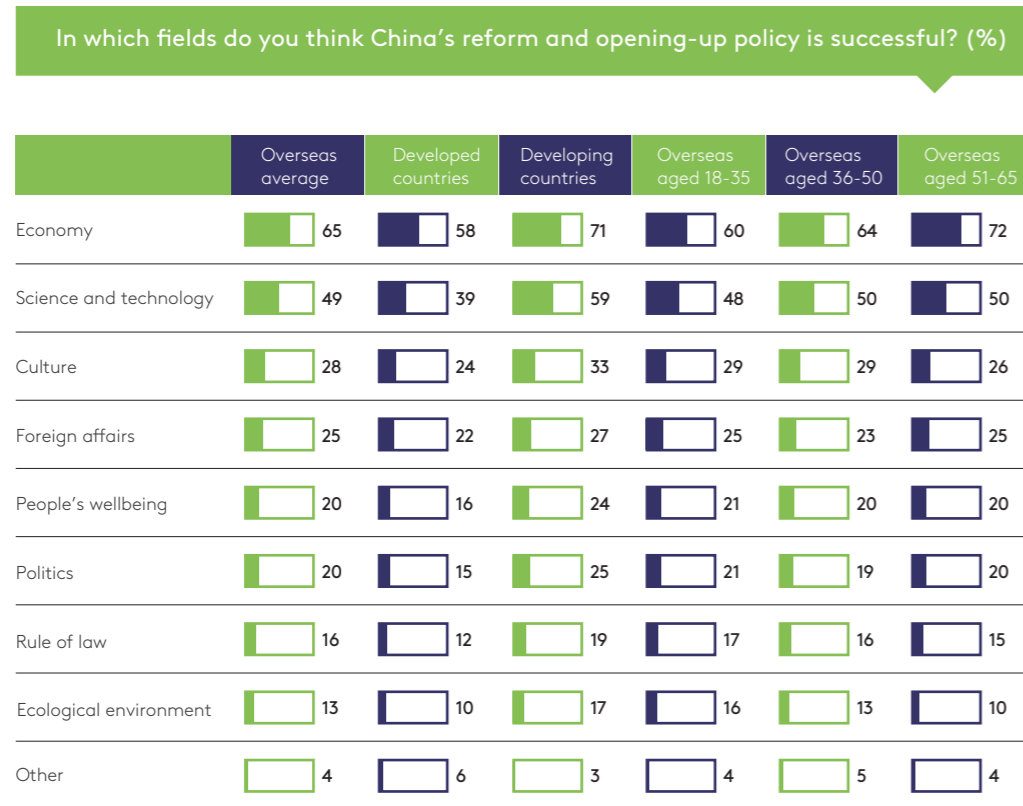
Please evaluate the influence of China's reform and opening up on the rest of the world. (%)



Regarding China’s reform and opening up, overseas respondents think highly of its success in the fields of economy, and science and technology.

Among the overseas respondents familiar with China’s reform and opening up, 65% thought that China was successful in economy, while 49% chose science and technology. Developing countries generally confirmed its positive contribution to all fields, with 71% of respondents there choosing economy as the most successful field for China. Among the three age groups, more people in the 51-65 group agreed that China was most successful with its economy.

Figure 9 The successful fields in China’s reform and opening up



Samples: 8,865 overseas knowing China’s 40 years of reform and opening up

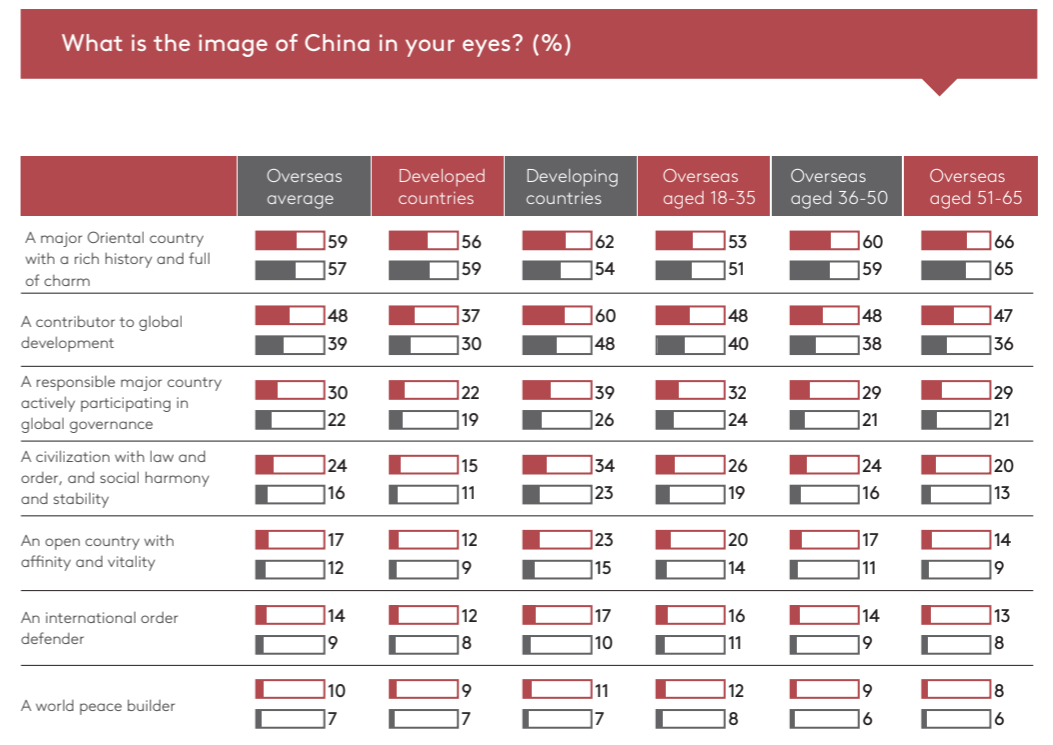
Part 3: Images of China and Its Citizens

A major Oriental country with a rich history and full of charm, and a contributor to global development: still the predominant image of China.

A major Oriental country with a rich history and full of charm. This was the most impressive image of China in the eyes of overseas respondents. 62% of the respondents in developing countries agreed with this image, exceeding the number in developed countries. Older people dominated the trend.

Developing countries had more positive comments on China, with 60% of their respondents recognizing China’s contribution to global development, up 12% on last survey.

Figure 10 Image of China



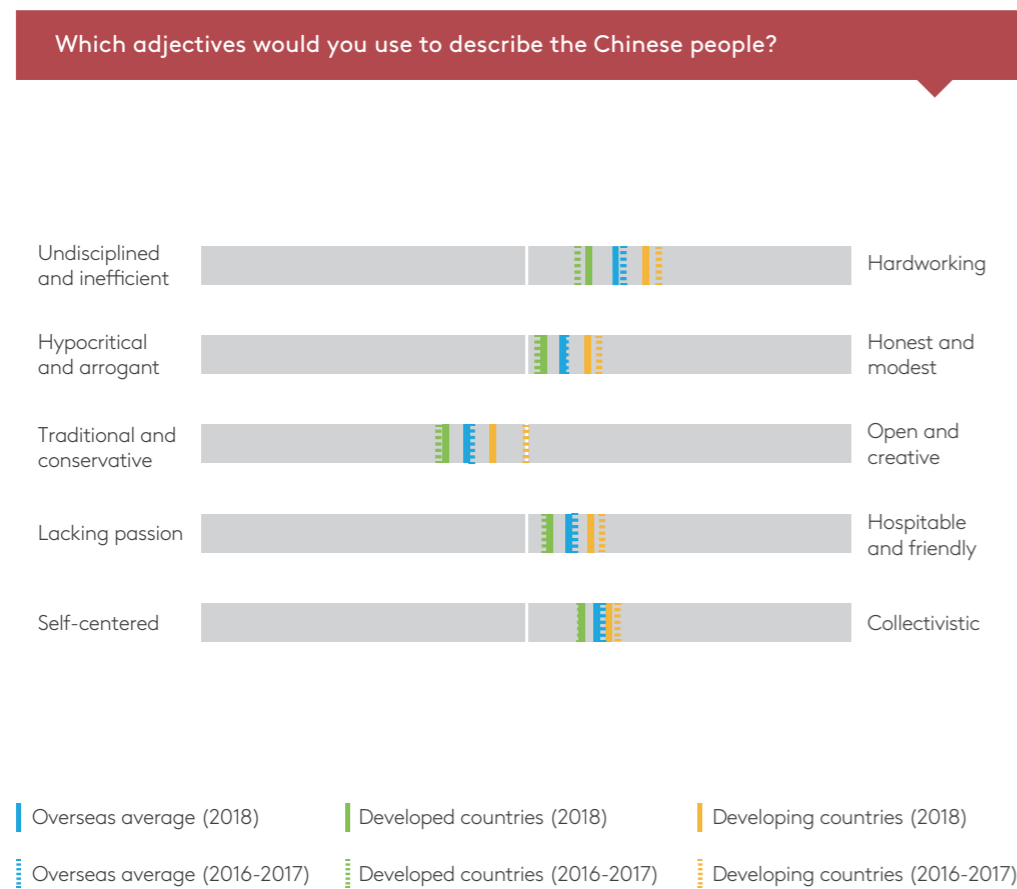
■ 2018 ■ 2016-2017

Samples: 10,500 overseas

Hardworking and collectivistic: The most recognized characteristic of the Chinese people.

Overseas respondents had a positive impression of the Chinese people, on the whole. Those in developing countries had better impressions. In the eyes of most overseas respondents, the Chinese people are hardworking and dedicated, collectivistic, honest and modest, hospitable and friendly, but somewhat traditional and conservative.

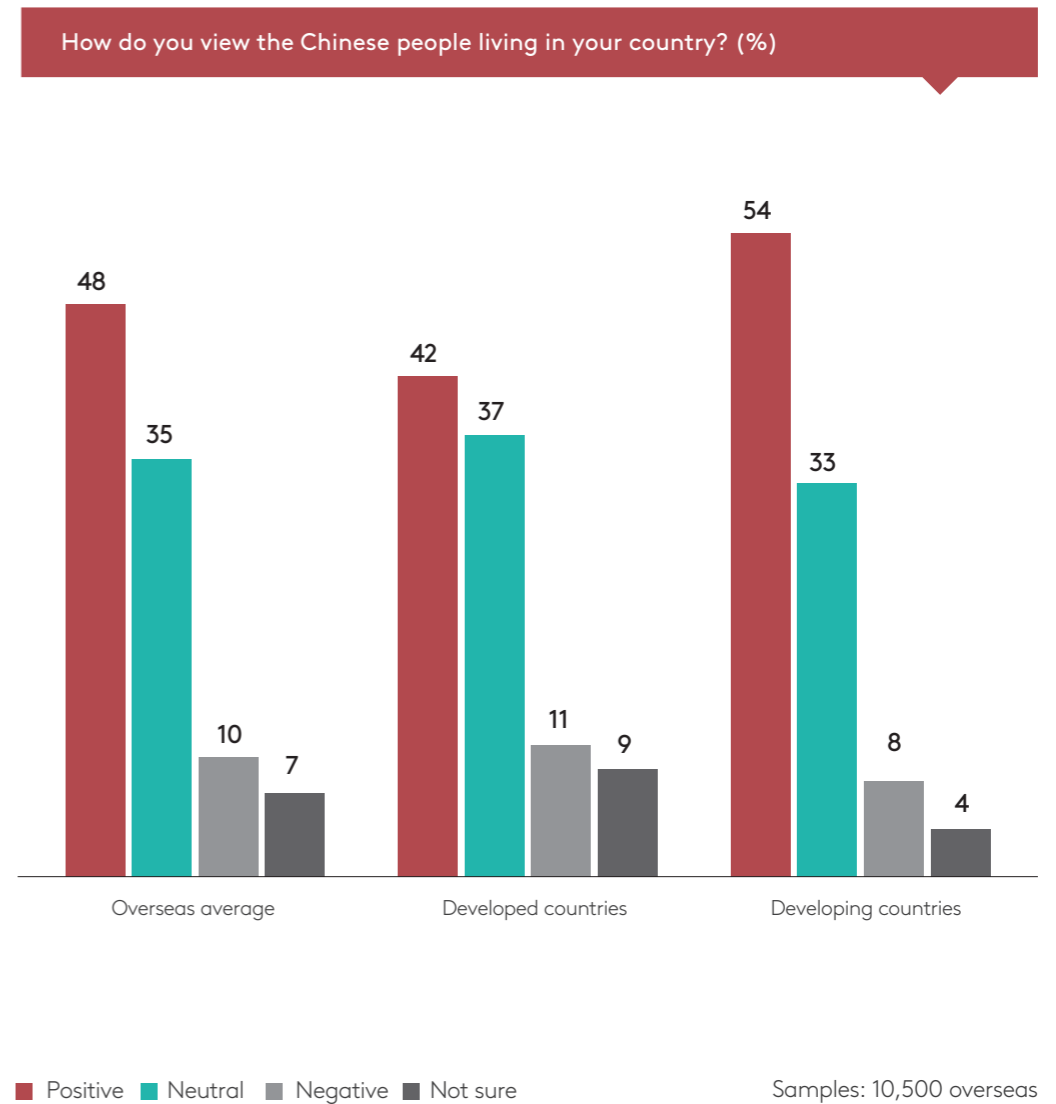
Figure 11 Image of Chinese citizens



The positive role of overseas Chinese in local communities is recognized.

48% of the overseas respondents acknowledged the positive role played by overseas Chinese in local communities, and the rate was higher (54%) among those surveyed in developing countries.

Figure 12 Image of overseas Chinese

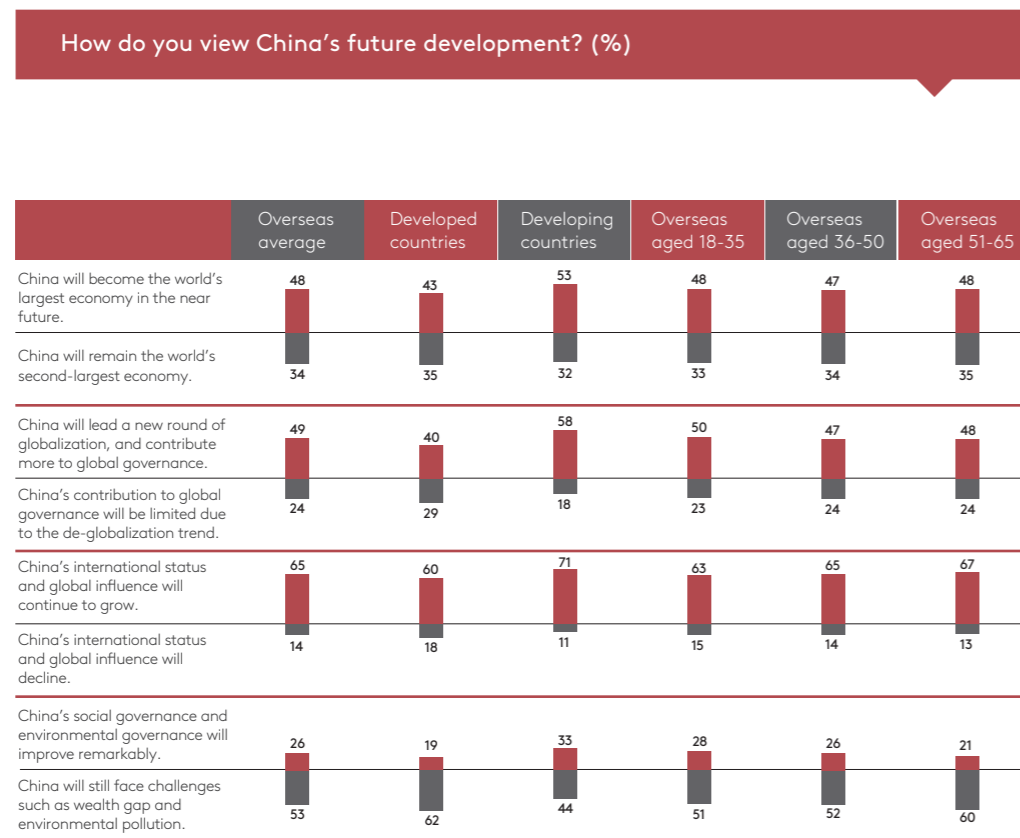


Overseas respondents optimistic about China's future development and believe that China's international status and global influence will continue to grow.

Overseas respondents were generally positive about China's future development, especially those in developing countries. They have confidence in China's economy. Nearly half of them believe that China will become the world's largest economy, lead a new round of globalization and contribute more to global governance, and 65% believe that China's international status and global influence will continue to grow.

Some think that China still faces such challenges as wealth gap and environmental pollution.

Figure 13 China's future development



■ 2018 ■ 2016-2017

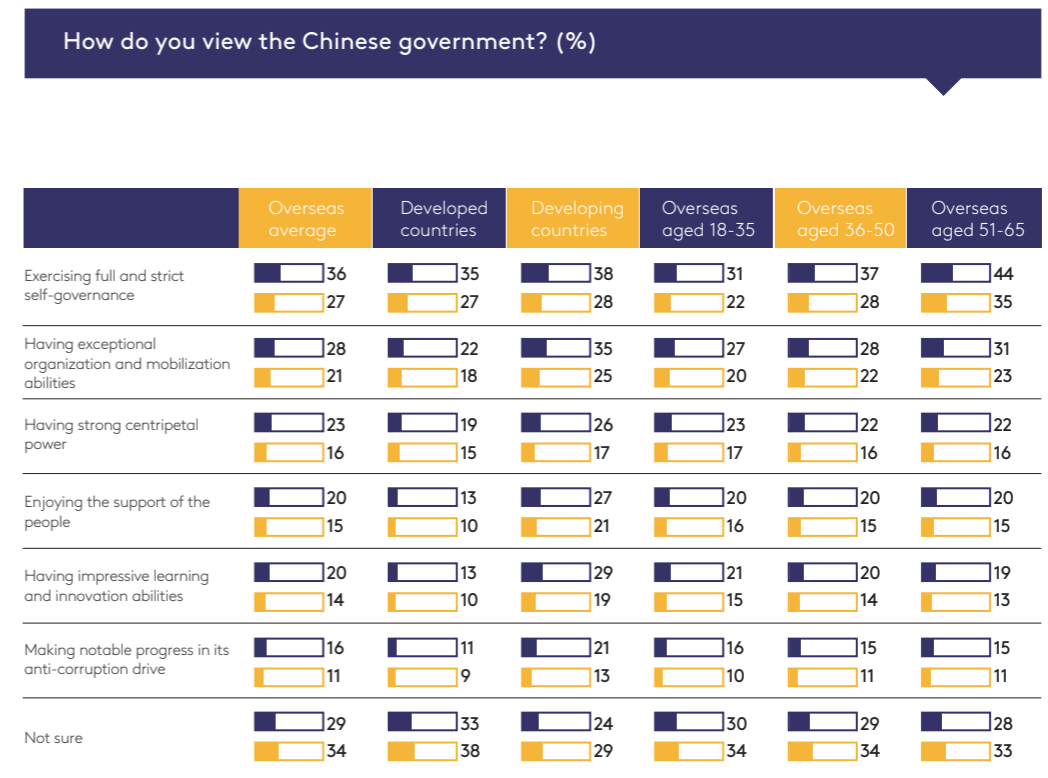
Samples: 10,500 overseas

Part 4: China's Political and Diplomatic Images

Full and strict self-governance, exceptional organization and mobilization abilities, and strong centripetal power: The prominent image of China's ruling party.

Overseas respondents were generally impressed by the "full and strict self-governance" of China's ruling party, its "exceptional organization and mobilization abilities" and its "strong centripetal power." Compared with the previous survey, more people overseas have acquired knowledge of China's ruling party, and their impressions of it have improved. Those aged 51-65 were especially impressed by its "full and strict self-governance" and "exceptional organization and mobilization abilities."

Figure 14 Image of China's ruling party



■ 2018 ■ 2016-2017

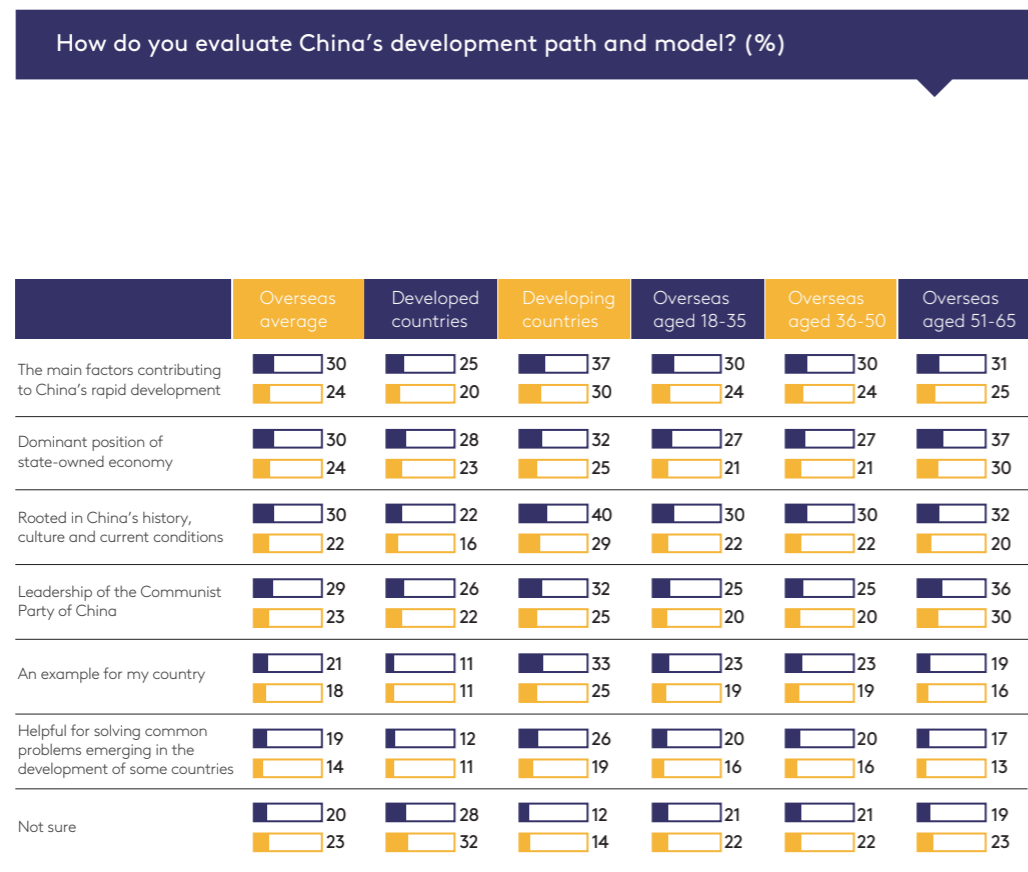
Samples: 10,500 overseas

Developing countries have more positive views on China's development path and model.

Compared to the previous survey, overseas respondents were more aware of China's development path and model, and of the positive results to come.

Overseas respondents, especially those in developing countries, attributed China's rapid development to its development path and model, which they thought are rooted in China's history, culture and current conditions. They also approved of the dominant position of the state-owned economy in this path and model.

Figure 15 Evaluation of China's development path and model



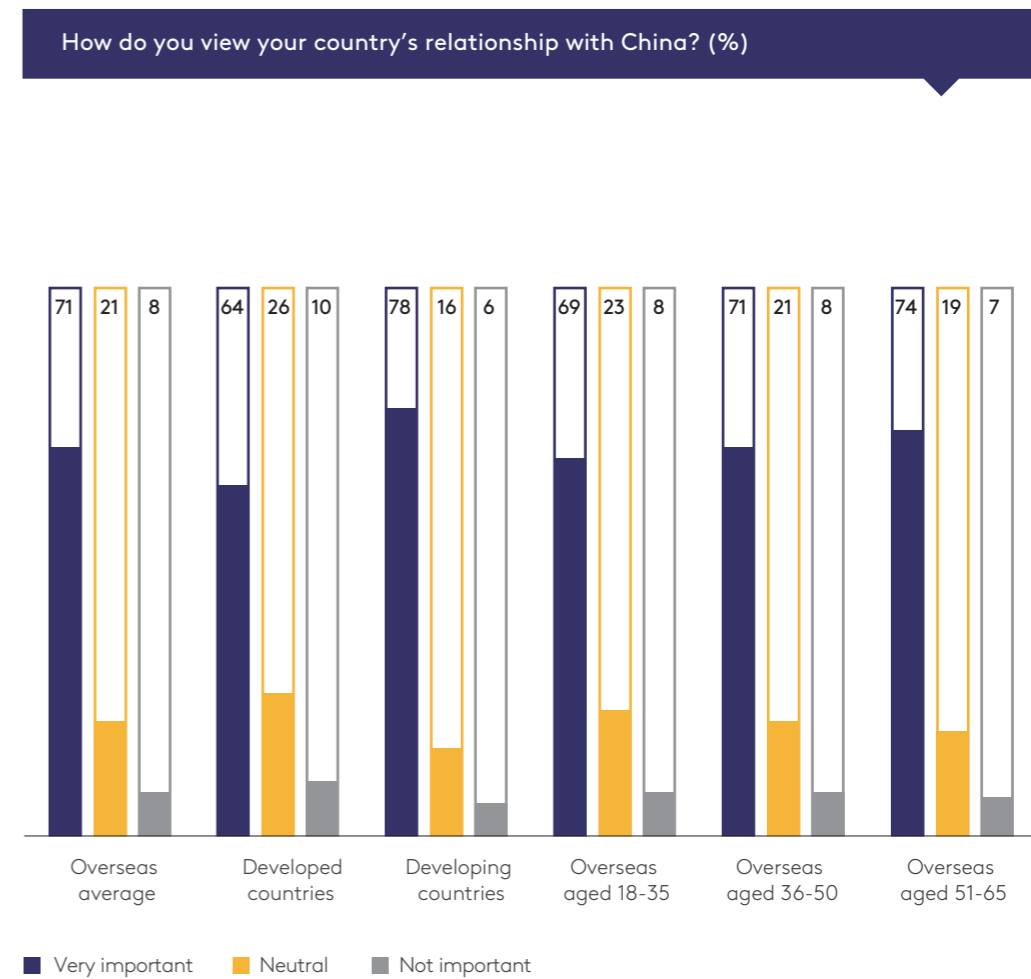
2018 2016-2017

Samples: 10,500 overseas

More than 70% of the respondents in developing countries value their diplomatic relations with China.

Of those familiar with their countries' relations with China, more than 70% called those relations important. Respondents in developing countries value their diplomatic relations with China especially highly, as do senior people.

Figure 16 Evaluation of relations with China



amples: 9,628 overseas knowing their countries' relations with China

China's proposal of building a community with a shared future for humanity: Widely acknowledged for its positive impacts on individuals, countries and global governance

About 60% of the overseas respondents considered China's proposal for building a community with a shared future for humanity as positive for individuals, countries and global governance. The ratio was higher in developing countries and among those aged 36-65.

Figure 17 Evaluation of China's proposal for building a community with a shared future for humanity (4-5 points)

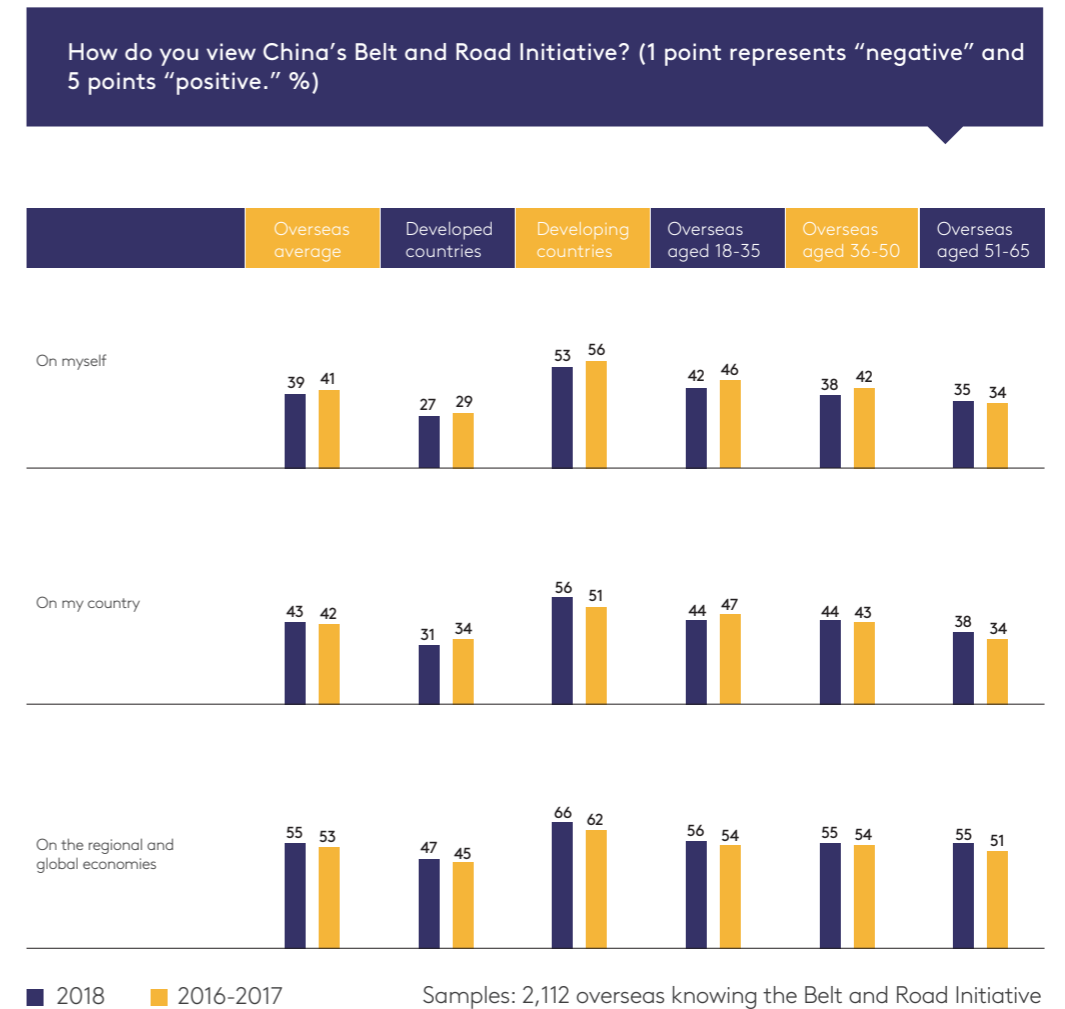


China's Belt and Road Initiative is gaining more attention for its positive impacts on the regional and global economies.

The Belt and Road Initiative is gaining more overseas popularity, with 20% of the overseas respondents having heard of the Silk Road economic belt and the 21st century maritime Silk Road, which ratio was 40% or higher in India, Japan and Italy. The top five countries with the highest awareness of the initiative were India (50%), Japan (43%), Italy (40%), the ROK (30%) and Russia (30%).

The initiative's positive impacts were widely affirmed; respondents in developing countries thought highly of the impacts on themselves as individuals, on their countries, and on the regional and global economies.

Figure 18 Evaluation of the Belt and Road Initiative (4-5 points)



Part 5: China's Economic Image

It is widely recognized that China's economy will maintain a high-speed growth, and that China is becoming the biggest trading partner of more and more countries.

The top three countries with the biggest global economic influence are the US (57%), China (36%) and Germany (19%). 40% of the overseas respondents, especially those aged 18-50, thought that China's economy would continue to grow at a high speed. Respondents in developing countries were more positive about China's economy.

Nearly 40% of the overseas respondents agreed that China is becoming the biggest trading partner of more and more countries, and this was the general view in developing countries. Nearly 30% of the overseas respondents held that China has a huge market demand, and this view was more popular in developed countries.

Figure 19 Evaluation of China's economy



Samples: 10,500 overseas

Developing countries have more positive comments on China's economic influence.

Compared with those in developed countries, respondents in developing countries had more positive comments on China's economic influence, especially China's role in driving global economic development.

Compared with the previous survey, more respondents in developed countries agreed that China's economic development promotes the global economy and that other countries benefit from China's economic development.

Figure 20 Evaluation of China's economic influence



Chinese enterprises' entry and presence brings along capital, technology and job opportunities to other countries.

Chinese enterprises face both opportunities and challenges regarding their overseas development, and this caught more attention than in the previous survey.

Compared with the respondents in developed countries, those in developing countries had more positive comments on Chinese enterprises' presence in their countries.

Figure 21 Evaluation of Chinese enterprises



Samples: 10,500 overseas

China's Internet sci-tech firms enjoy rise in popularity.

Lenovo, Huawei and Alibaba remain the top three best known Chinese brands among overseas respondents. Xiaomi and Hisense have jumped to top five.

Figure 22 Overseas recognition of Chinese brands

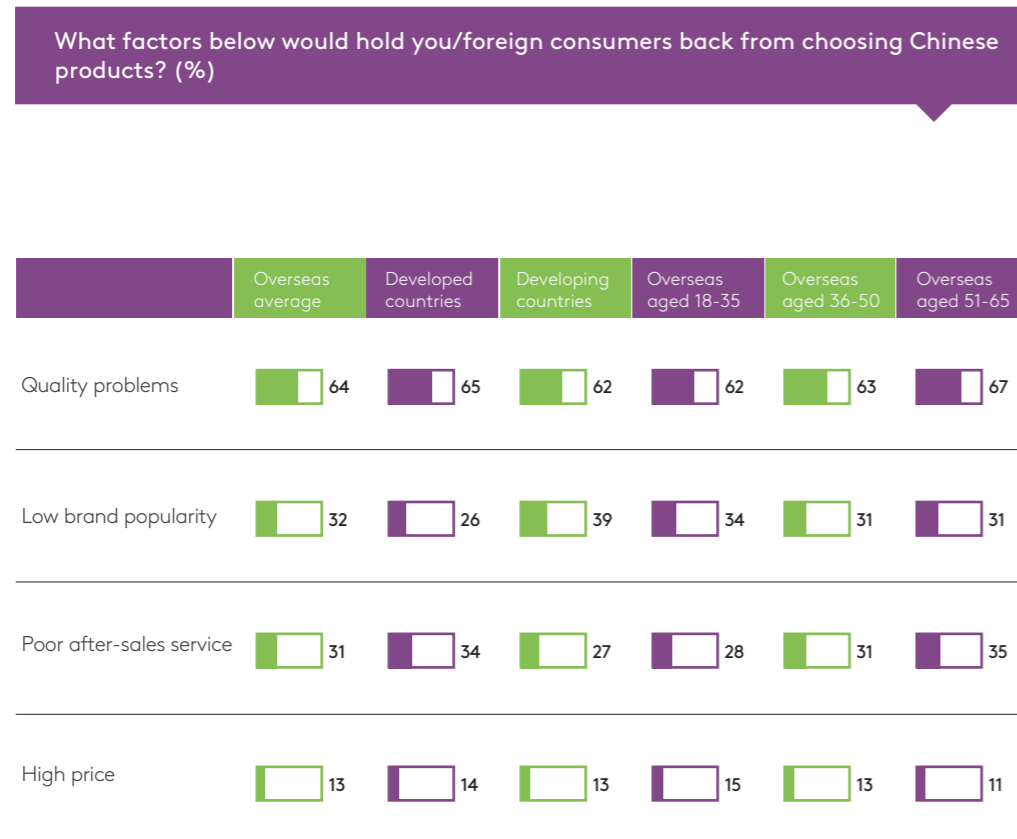


Samples: 10,500 overseas

Quality problems remain the major factor hindering overseas development of Chinese brands.

Of the overseas respondents, 64% complained about the quality of Chinese products. Compared with the previous survey, more respondents were dissatisfied with after-sales services of the Chinese brands, and thought they had a low popularity. The 18-35 age group was generally more positive about Chinese products, with less worries about the quality and after-sales service.

Figure 23 Factors holding back overseas respondents from choosing Chinese brands



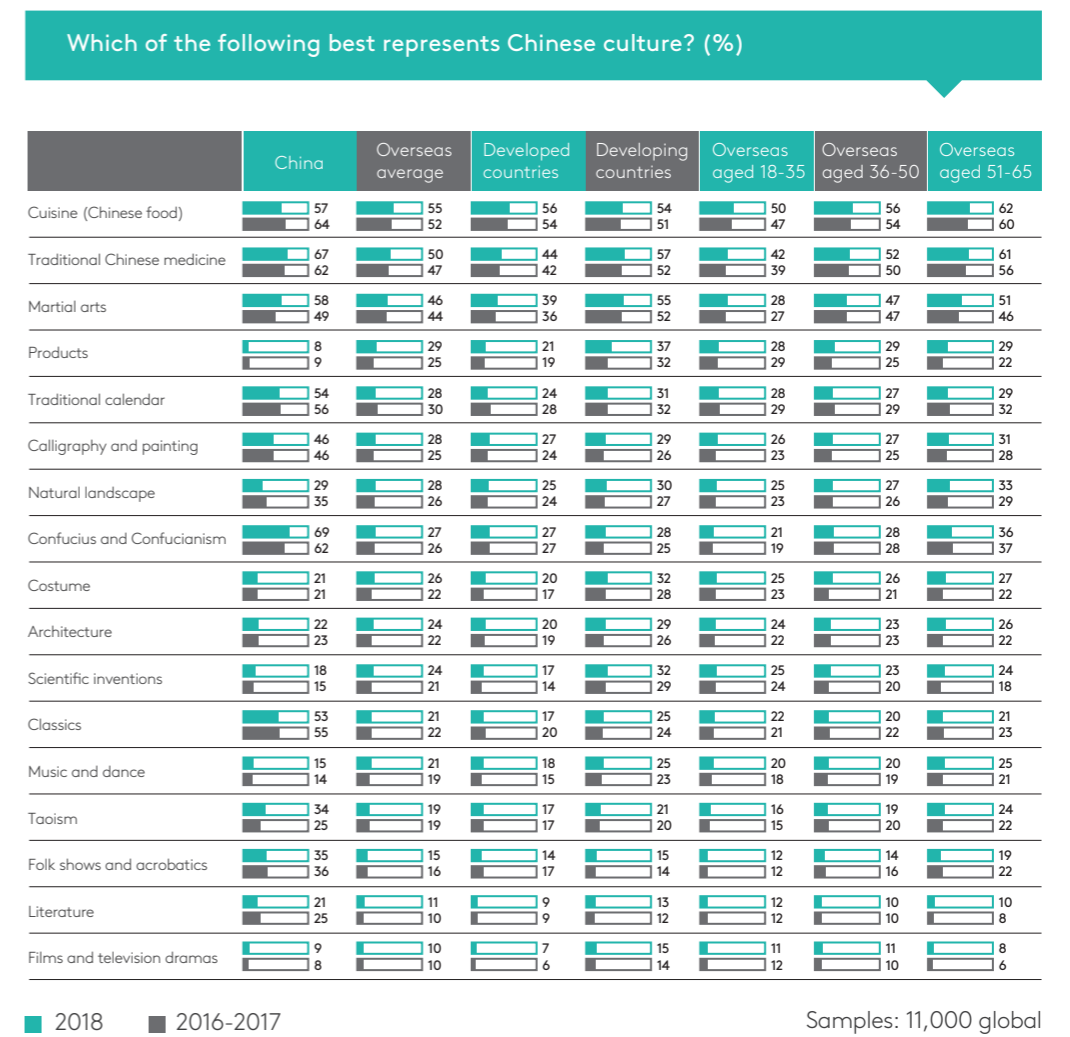
Samples: 10,500 overseas

Part 6: China's Images in Culture, Science and Technology

Chinese cuisine, traditional Chinese medicine and martial arts: best represent Chinese culture.

Focusing on the elements that best represent Chinese culture, 55% of the overseas respondents chose Chinese cuisine, 50% ticked traditional Chinese medicine, and 46% marked off martial arts. More people in developed countries thought cuisine the best representative of Chinese culture, while more people in developing countries chose traditional Chinese medicine and martial arts. People aged 36 or older thought these three to be typical Chinese cultural elements, and those aged 51-65 tended to think that Confucius and Confucianism best represent Chinese culture.

Figure 24 Representative elements of Chinese culture



Samples: 11,000 global

Nearly 80% of the overseas respondents have sampled Chinese food and praise it.

79% of the overseas respondents have tasted Chinese food. More people in developed countries than in the previous survey have had such an experience.

Of the people overseas who have eaten Chinese food, 81% praised its taste. Compared with the previous survey, Chinese food enjoys higher popularity, particularly in developing countries and with those aged 18-50.

Figure 25 Experience with Chinese cuisine

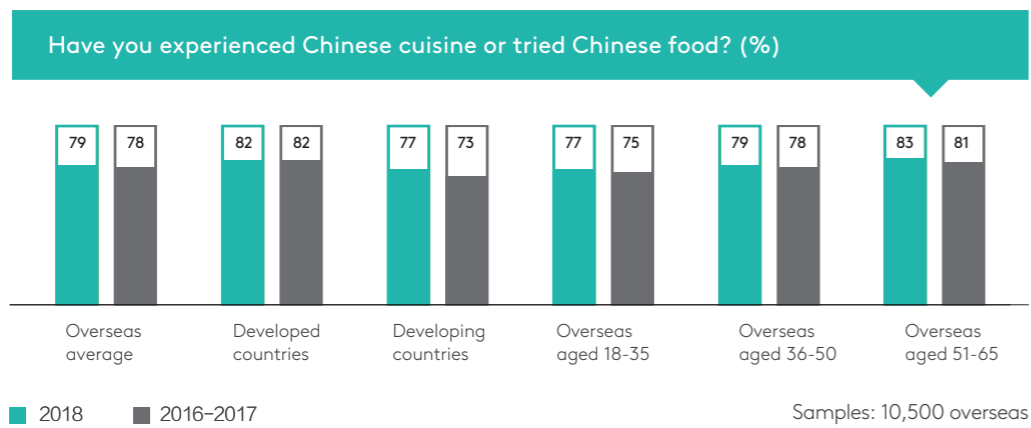
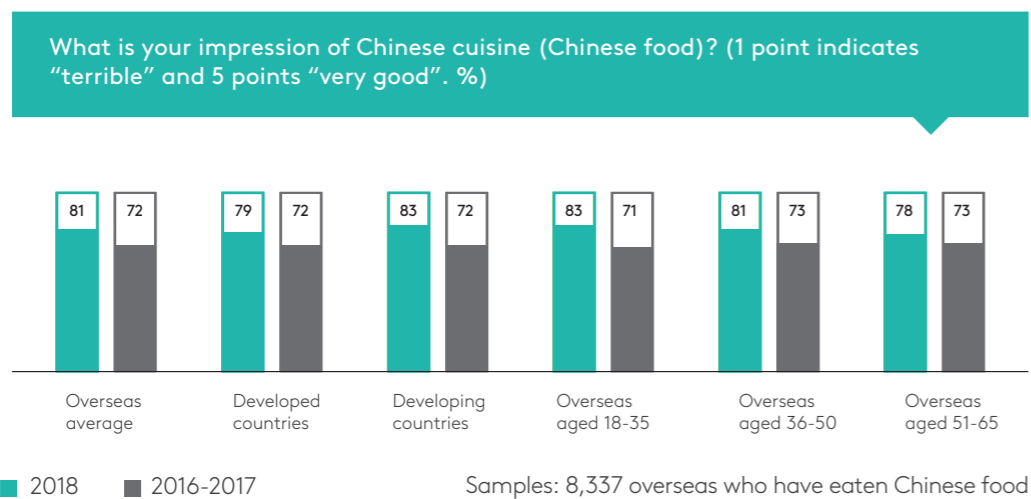


Figure 26 Impression of Chinese cuisine (very good+good)



Traditional Chinese medicine is highly praised.

31% of the overseas respondents have experienced traditional Chinese medicine. Compared with the previous survey, the proportion was higher in developing countries and among those aged 36-65.

Of those who have had such experience, 81% made positive comments, much higher than in the previous survey.

Figure 27 Experience with traditional Chinese medicine

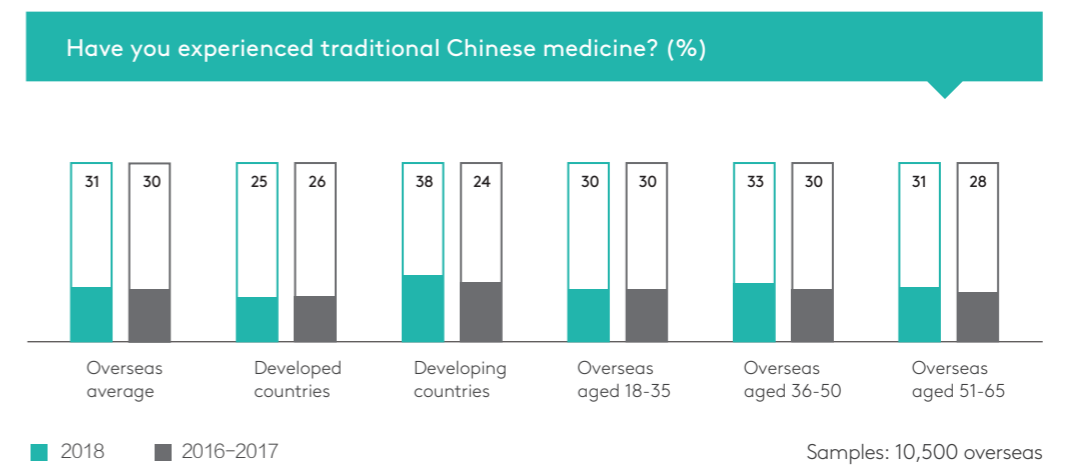
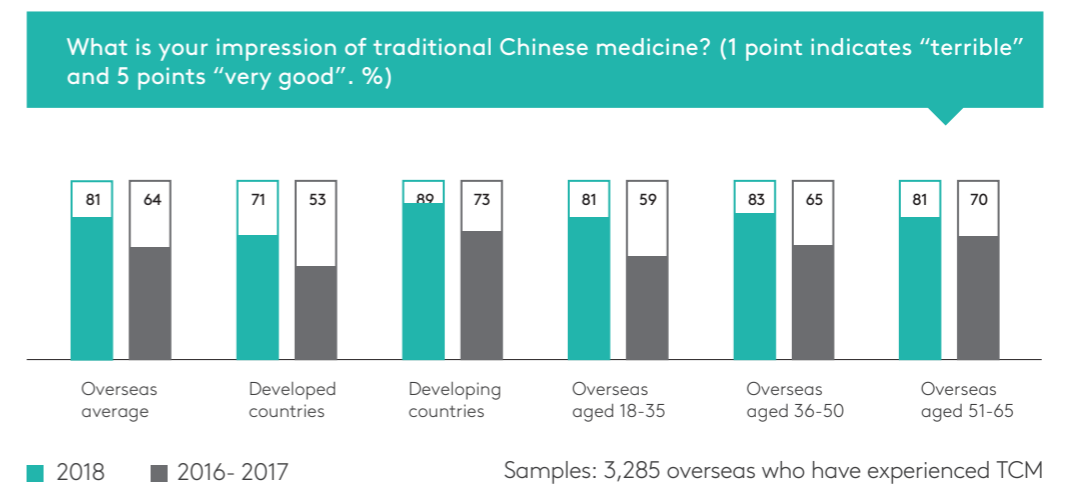


Figure 28 Impression of traditional Chinese medicine (very good+good)



China's technological innovation capacity is appreciated by more people, with high-speed rail being its best-known technological achievement.

66% of the overseas respondents made a positive assessment of China's technological innovation capacity, and the proportion was much higher in developing countries. Compared with the previous survey, this time China's technological innovation capacity won higher evaluation both in China and overseas, and among all age groups overseas.

High-speed rail was China's best known technological achievement, followed by supercomputer and manned space flight.

Figure 29 Awareness of China's scientific and technological achievements

Which of the following Chinese scientific achievements are you aware of? (%)

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
High-speed rail	43	37	48	40	42	47
The world's fastest supercomputer	23	18	28	25	22	20
Manned space technology	22	21	22	20	22	24
Intelligent logistics such as unmanned warehouse	18	12	24	19	18	17
Lunar Exploration Program	17	15	18	17	16	16
The world's first Quantum Science Satellite	14	9	19	16	13	10
Beidou Navigation Satellite System (BDS)	13	8	18	14	13	11
High-yield rice	13	10	17	15	13	12
None of the above	32	38	25	29	33	34

Samples: 10,500 overseas

Part 7: Channels for People Overseas to Get to Know China

An increasing number of people are getting to know about China through Chinese products and personal contacts, and less through local media.

Local traditional media (47%) and Chinese products (36%) were the main channels for overseas respondents to get to know about China. Compared with the previous survey, fewer people got to know about China through local traditional and new media, while more people were informed about China through China-related channels such as Chinese products, information from people who know China, direct contacts the Chinese people, and China's new media outlets in their countries.

Many more people in developing countries than in developed countries tended to learn about China through Chinese products.

Figure 30 Main channels for learning about China

What are the main channels for you to learn about China?

	Overseas average	Developed countries	Developing countries	Overseas aged 18-35	Overseas aged 36-50	Overseas aged 51-65
Local traditional media	48 61	47 57	48 66	42 57	48 63	55 66
Local new media	47 41	36 32	59 51	46 42	48 40	48 41
Made-in-China products	33 43	27 34	39 53	36 49	31 42	28 36
Information from people who know China	28 23	24 21	33 25	29 24	28 22	27 22
China's traditional media outlets abroad	19 15	18 15	20 15	19 15	20 15	17 14
Direct contacts with the Chinese people	18 18	13 15	23 20	19 21	17 17	16 12
China's new media outlets abroad	15 12	10 8	20 17	18 17	14 11	10 7
Activities organized by China in my country	10 7	7 5	12 9	12 8	9 7	7 6
Visit(s) to China	9 7	9 7	10 7	11 8	9 7	8 6
Other countries' media	1 1	1 1	1 1	1 1	1 1	2 2

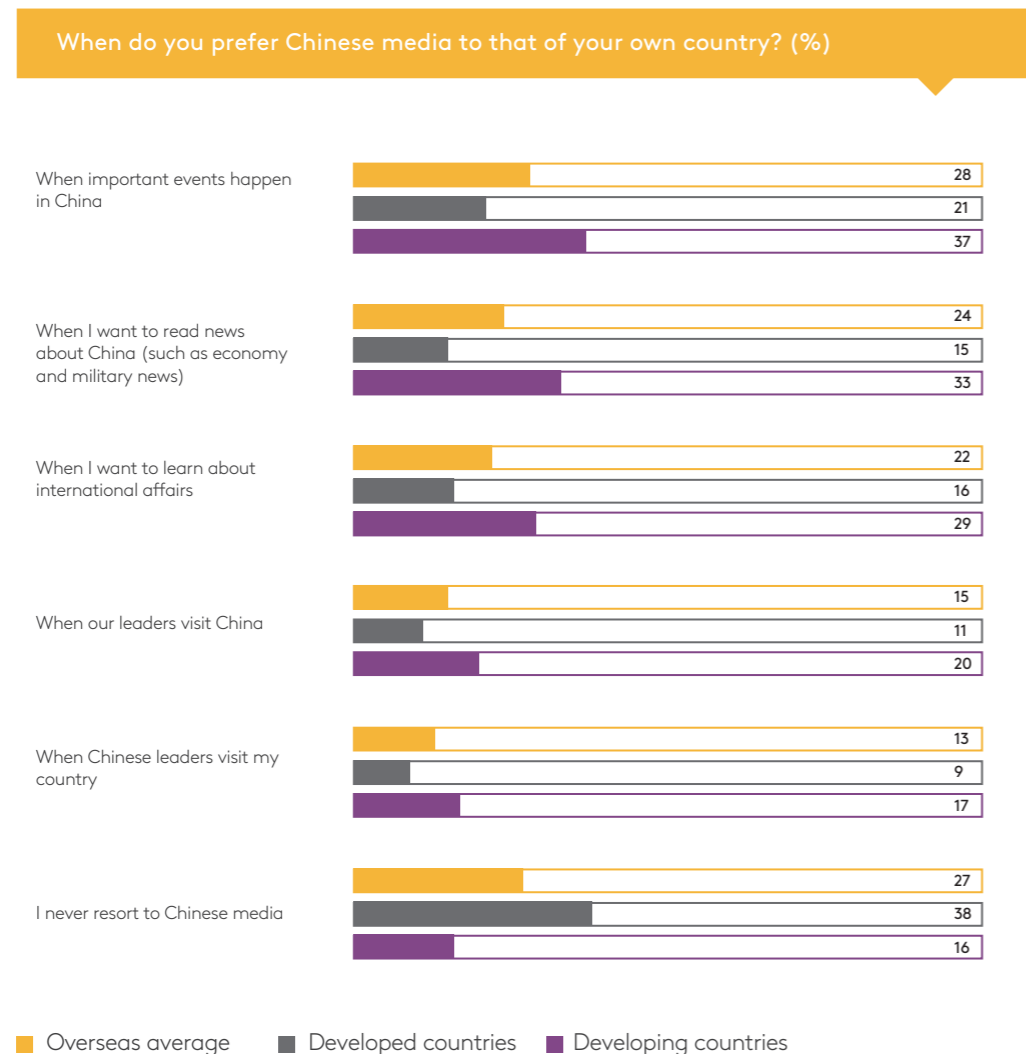
2018 2016-2017

Samples: 10,500 overseas

Chinese media is the primary channel for overseas respondents to learn about major events in China.

When major events happen in China or when they want to get information about the country, overseas respondents tend to turn to Chinese media rather than the media of their own countries. This is more so in developing countries.

Figure 31 Preference for Chinese media

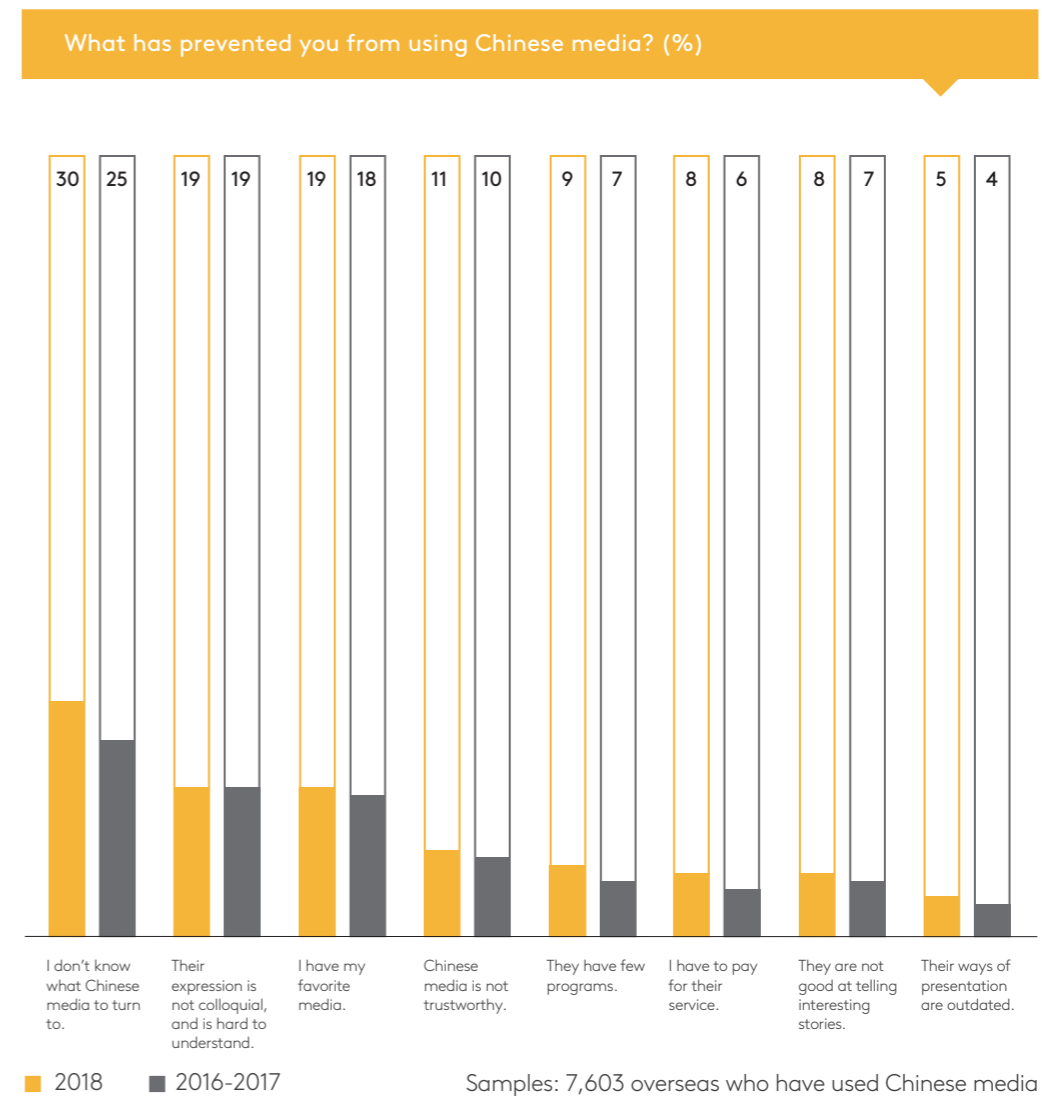


Samples: 10,500 overseas

"I don't know what Chinese media to turn to": still a major obstacle to overseas communication for Chinese media

The main factors that prevented overseas respondents from using Chinese media: "I don't know what Chinese media to turn to" (30%, more than last survey), "Their expression is not colloquial, and is hard to understand" (19%), and "I have my favorite media" (19%).

Figure 32 Obstacle for overseas communication of Chinese media



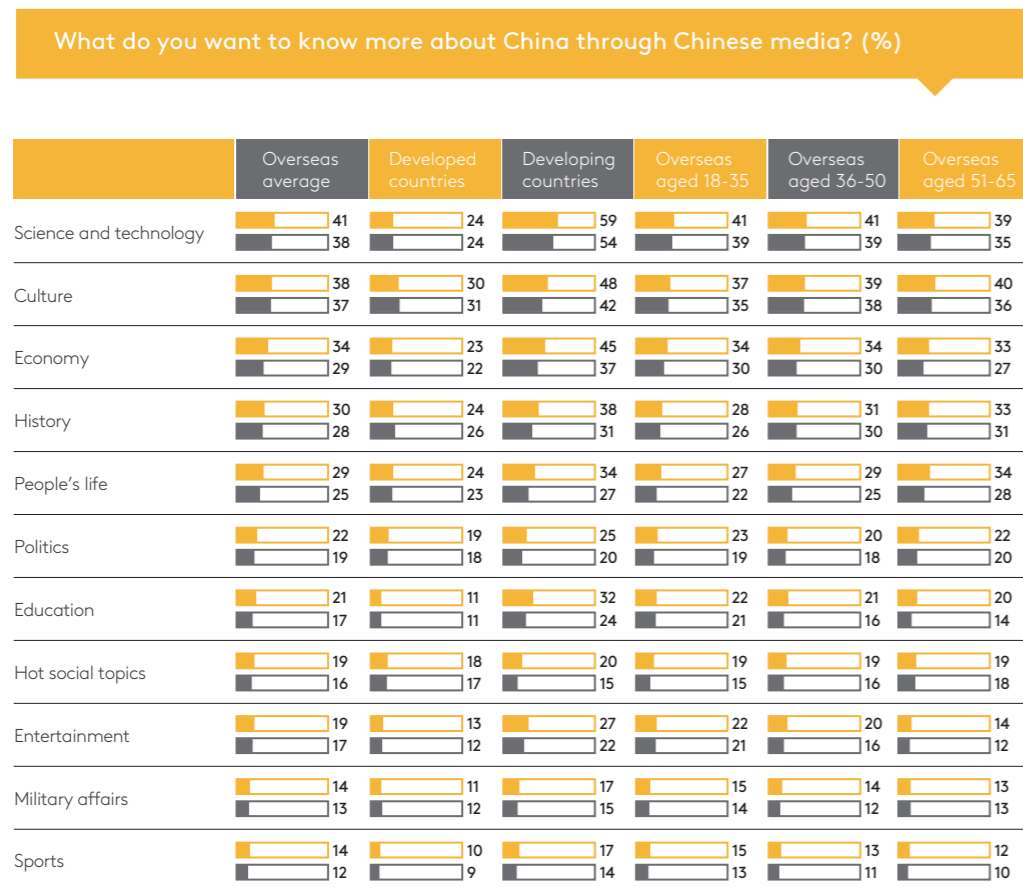
Samples: 7,603 overseas who have used Chinese media

China's science and technology, culture and economy are what people overseas most want to learn about

People overseas wanted to learn about China's science and technology (41%), culture (38%) and economy (34%) through Chinese media, and they were also interested in its history, people's life and politics. Compared with the previous survey, they showed more interest in learning about China through Chinese media.

Developing countries had a much stronger interest in learning about China, especially its science and technology, culture, economy, history and education.

Figure 33 Information about China to learn through Chinese media



■ 2018 ■ 2016-2017

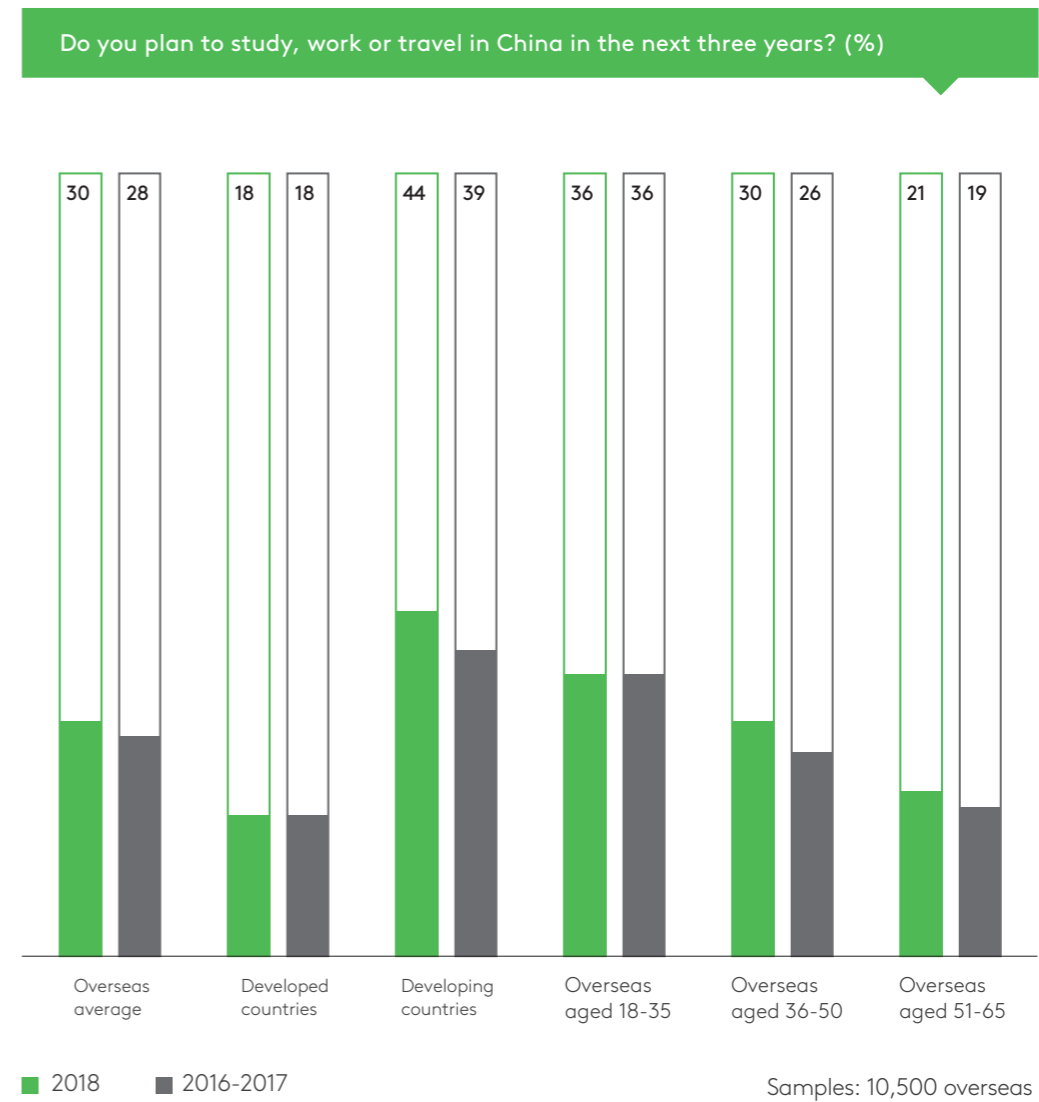
Samples: 10,500 overseas

Part 8: Interest in Visiting China

Young people and those from developing countries have the most interest in visiting China.

44% of the people in developing countries planned to study, work or travel in China in the next three years. The younger, the stronger interest.

Figure 34 Plan to visit China in the next three years



■ 2018 ■ 2016-2017

Samples: 10,500 overseas

Beijing, Hong Kong and Shanghai: still the best known Chinese cities among the people overseas

Beijing, Hong Kong and Shanghai were the three most favored Chinese cities among the people overseas who planned to visit China in three years. Developing countries had more interest in Beijing, so were those aged 51-65.

Figure 35 Top three Chinese destinations



■ 2018 ■ 2016-2017 Samples: 3,158 overseas planning to visit China in three years

Cultural heritage, local life and natural landscape: the main appeals to overseas visitors.

Cultural heritage (59%), local life (49%) and natural landscape (48%) were the main appeals to overseas visitors. More people in developing countries chose to visit China for an experience of local life, for its natural landscape and for study/further study. Among the three age groups, those aged 36-65 were appealed by China's cultural heritage, and those aged 18-35 preferred to study or further their study in China.

Figure 36 Main reasons to visit China

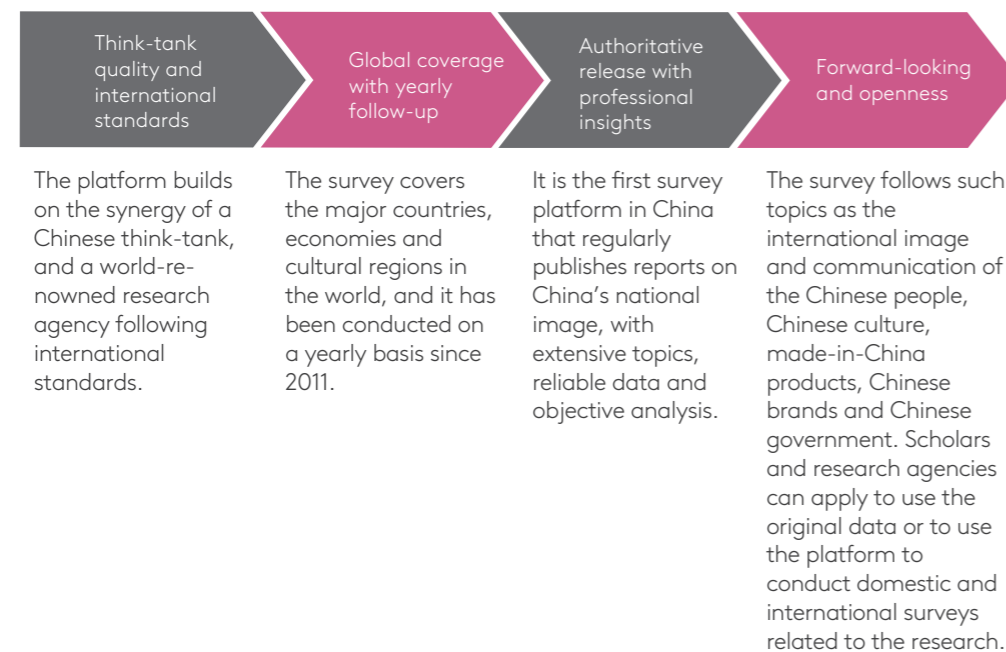


■ 2018 ■ 2016-2017 Samples: 3,158 overseas planning to visit China in three years

Part 9: About the Platform of China's National Image Survey

The platform of China's national image survey is jointly developed by the Academy of Contemporary China and World Studies and Kantar Group, 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 in-depth insights and practical proposals 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 have been made public.

Special features of the platform



Content of the survey

Basic topics: **Global survey of China's national image:**

China's image in politics, diplomacy, economy, culture, and science and technology, and the image of the Chinese people

Overseas surveys of the images of Chinese brands:

Recognition and popularity

Optional topics:

Omnibus surveys on the hot topics of the year, and commissioned surveys for scientific or marketing research purposes

Methodology of the survey

The survey is conducted online, using Kantar's global sample base and in strict compliance with international standards. The samples reflect the demographic conditions of each country surveyed. The same methods have been followed in all of the surveys.

Institutions involved

Academy of Contemporary China and World Studies

The Academy of Contemporary China and World Studies, formerly the Center for International Communication Studies under the China Foreign Languages Publishing Administration, is a state-level think-tank established in 2004. With nearly 100 in-service researchers and dozens of Contract Research Fellows, it specializes in studies of contemporary China and world, translation and international discourse system, international communication and international news.

The academy is renowned for its studies on practical subjects and corresponding suggestions. It has established advantages and prestige in studies on global communication strategy designing and policy planning, China's image building, international communication system, evaluation of communication effects, translation and international discourse system, and China-related international news. Based on its multilingual information sources covering major media organizations, publishers, think tanks and public opinion research agencies worldwide, the academy offers more than 20 dynamic research products, and has released Annual Report on the Analysis of China-related News in Overseas Media for 13 years running. It is also the editor of the book series "Keywords to Understand China" and "Studies of International Communication Theories and Practices", which are distributed worldwide, and the sponsor of national journals such as Chinese Translators Journal and International Communications.

The academy has held five sessions of Seminar on International Communication, conducted global surveys of China's national image for six consecutive years, published annual reports on the global survey of Chinese enterprises' image for four consecutive years, organized selection of top 10 models for international communication for three years, and solely or jointly hosted several international thinktank conferences as well as bilateral and multilateral think-tank dialogues. It also holds such events as the TAC Conference, highlevel training for translators specialized in international communication, the Han Suyin Award for Young Translators and the All China Interpreting Contest.

Kantar Group

Kantar is the world's leading marketing data, insight and consultancy company. It knows how people live, feel, shop, vote, watch and post worldwide. It knows what people need and makes constant technological innovation. There are more than 30,000 Kantar employees working around the world and helping leading organizations in all fields to grow and make success.

