

American Edge Project – U.S. and EU Tech Sector Views



Methodology

Voters

Ipsos conducted a survey between May 19th-27th, 2021 in the U.S. and UK and May 21st-27th, 2021 in France, Belgium and Germany, **A sample of 4,500 adults age 18+ who are registered to vote were interviewed online. 1,000 interviews done in each of the following: the United States, the United Kingdom, France, and Germany, as well as 500 interviews done in Belgium**

The sample was randomly drawn from Ipsos' online panel, partner online panel sources, and "river" sampling and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. Weighting has been employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country level-census data.

Credibility Interval

The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 1.7 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following ($n=4,500$, $DEFF=1.5$, adjusted Confidence Interval= ± 3.2 percentage points).

Key Findings

Leading up to the G7 summit, American and European voters reaffirm that the Western alliance continues to share a common set of values. Voters on both sides of the Atlantic see the best in one another – that they allow for freedom of expression, allow for a free and open internet, and value human rights. They also believe that China does not champion these values, and instead promotes censorship of ideas, uses state-sponsored tech companies to repress minorities, and supports surveillance of political opponents.

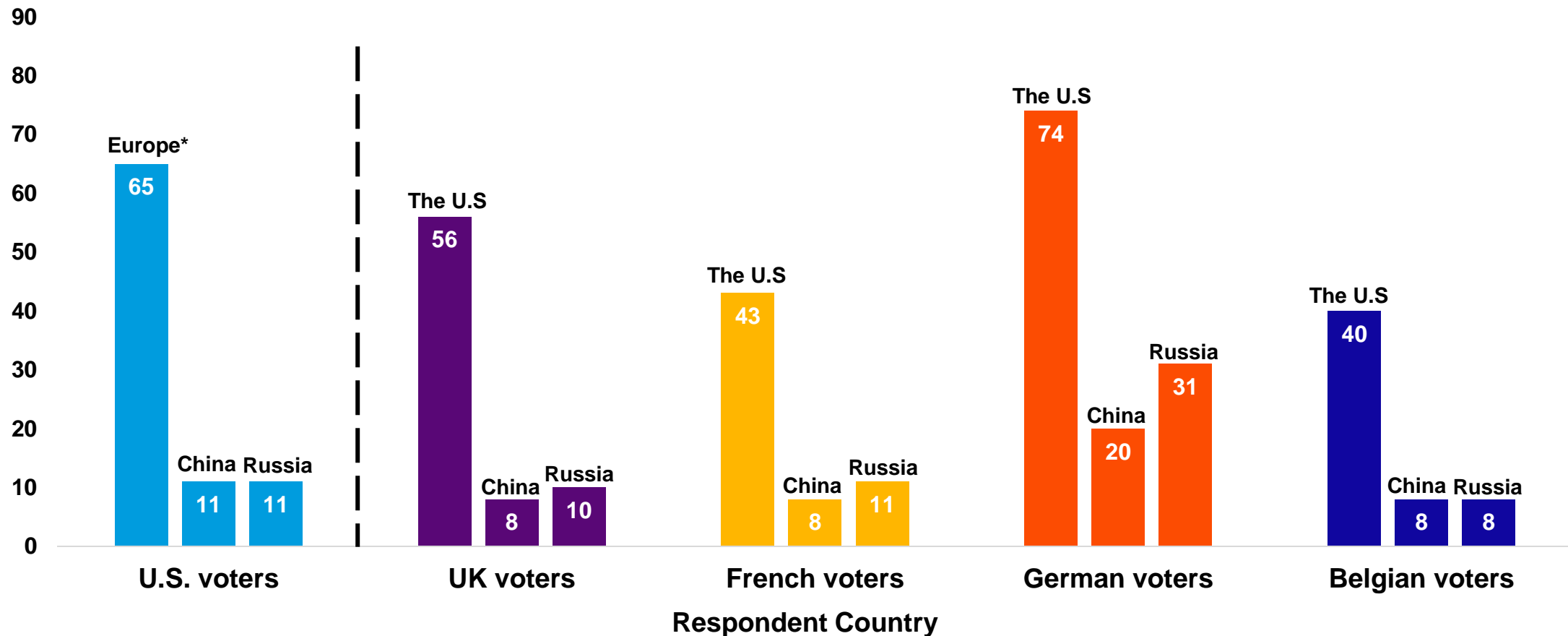
The transatlantic alliance is clear-eyed about the threat posed by a rising China. American and European voters also share a deep concern about China’s increasingly confrontational geopolitical maneuvers and influence campaigns. They believe that China, and to a lesser extent Russia, is a threat to their economic wellbeing and national security interests. They also agree that the more China and Russia control the global internet, the more it will hurt the health of Western democracies.

In response, voters want greater transatlantic cooperation to balance China’s influence. American and European voters are calling for closer cooperation with one another to guard against common threats like China and Russia. This includes jointly building stronger digital infrastructure, uniting to defend their common values, and collectively setting rules and standards for the internet in a way that protects democracy.

International Outlook

Western democracies have a strong sense of shared values; distinct from China and Russia

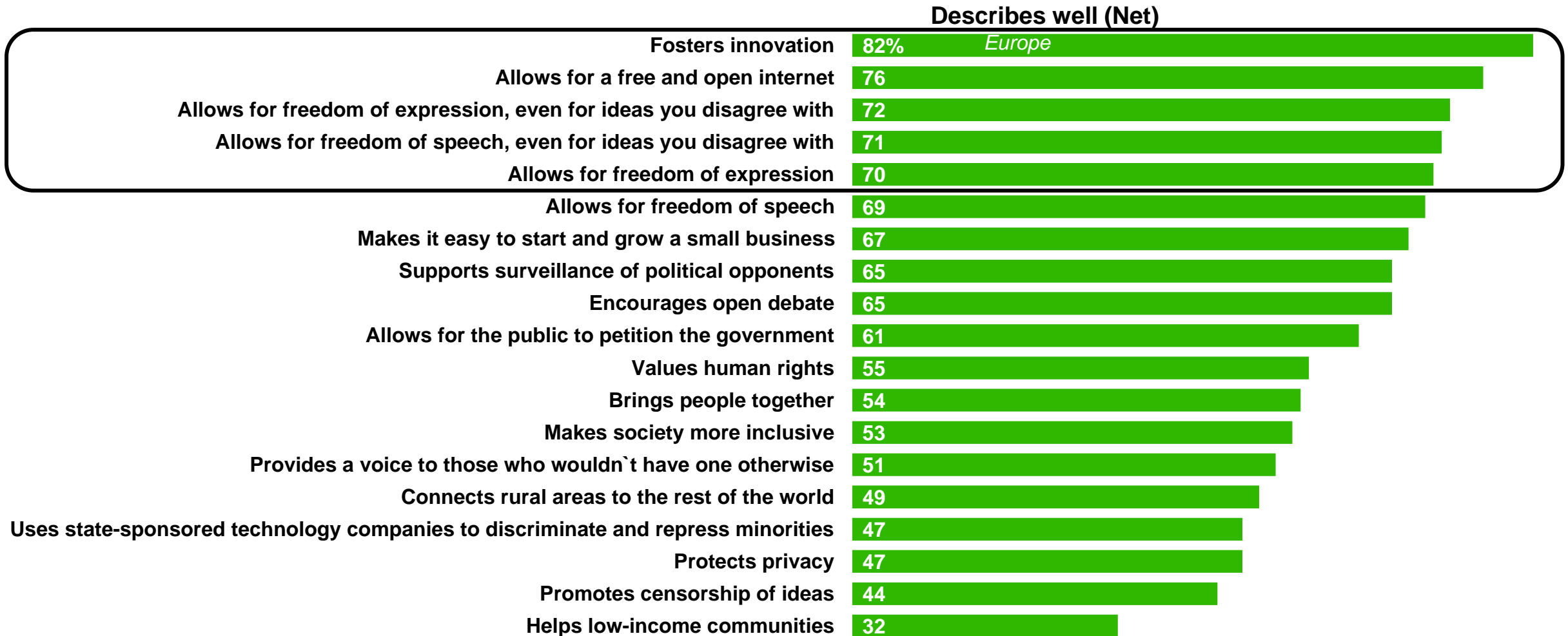
% shares the same values with (the U.S. / Europe)



*average of European countries

European voters view the U.S. as a hub of innovation with a free and open internet, and a country that allows for freedom of expression

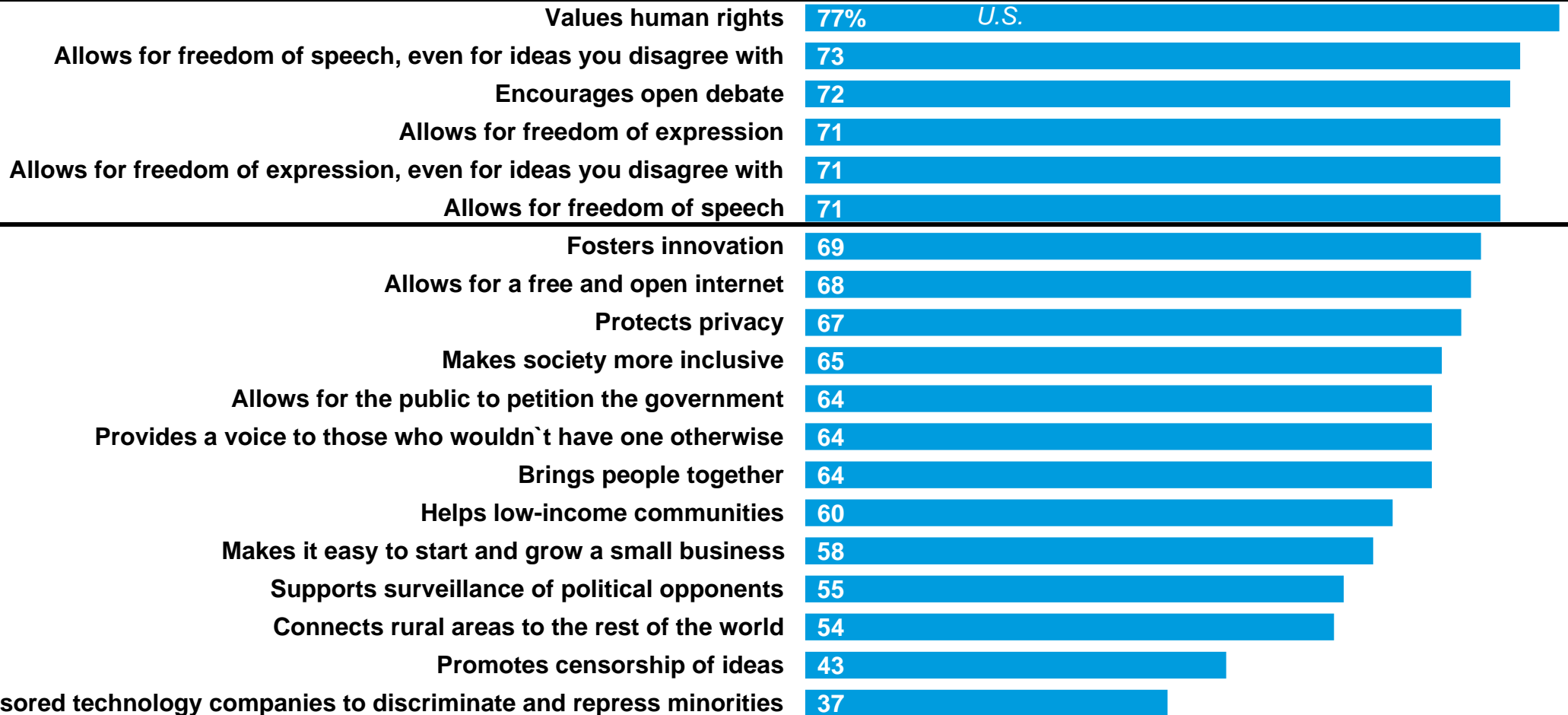
For each, please indicate how well you feel it describes the U.S.



U.S. voters view the EU as a champion of human rights, encouraging open debate and free expression

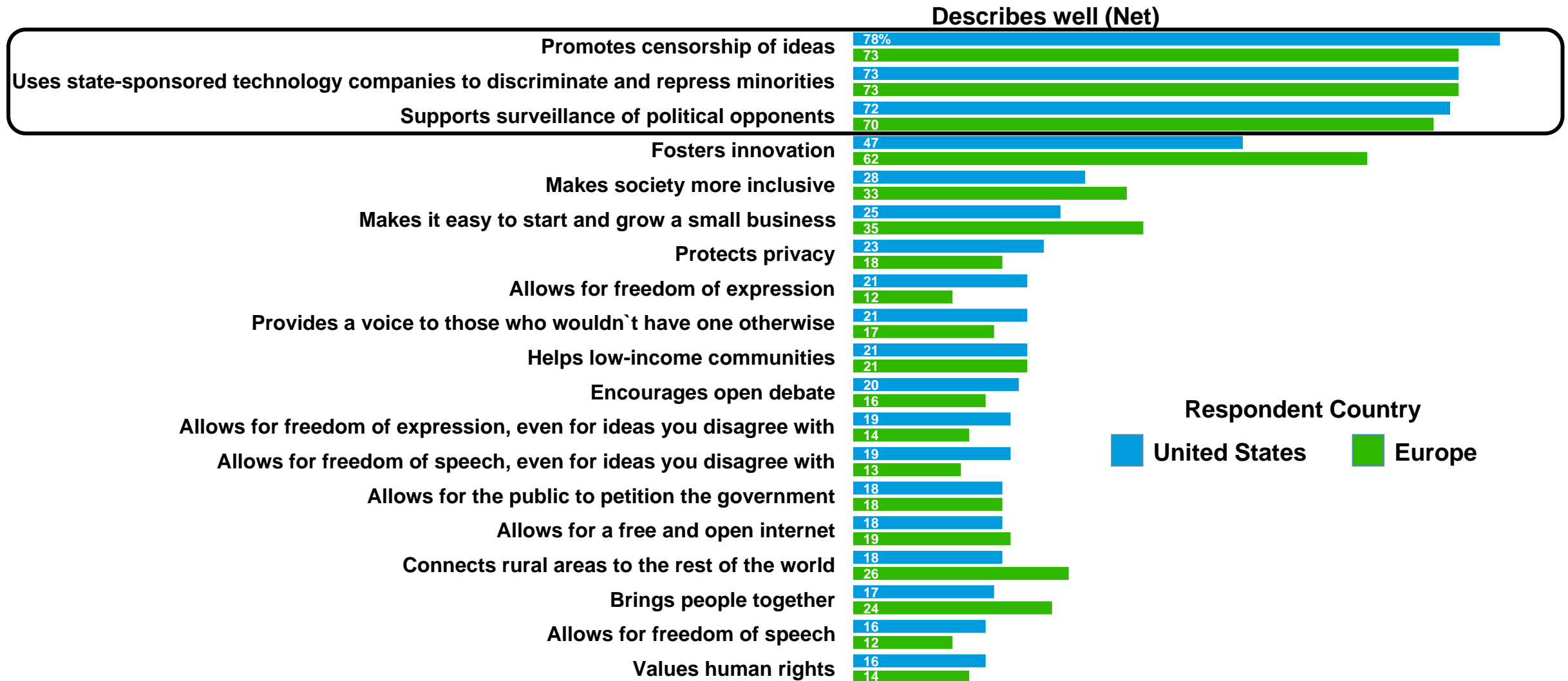
For each, please indicate how well you feel it describes the EU.

Describes well (Net)



Both U.S. and EU voters believe China promotes censorship and is politically repressive

For each, please indicate how well you feel it describes China.



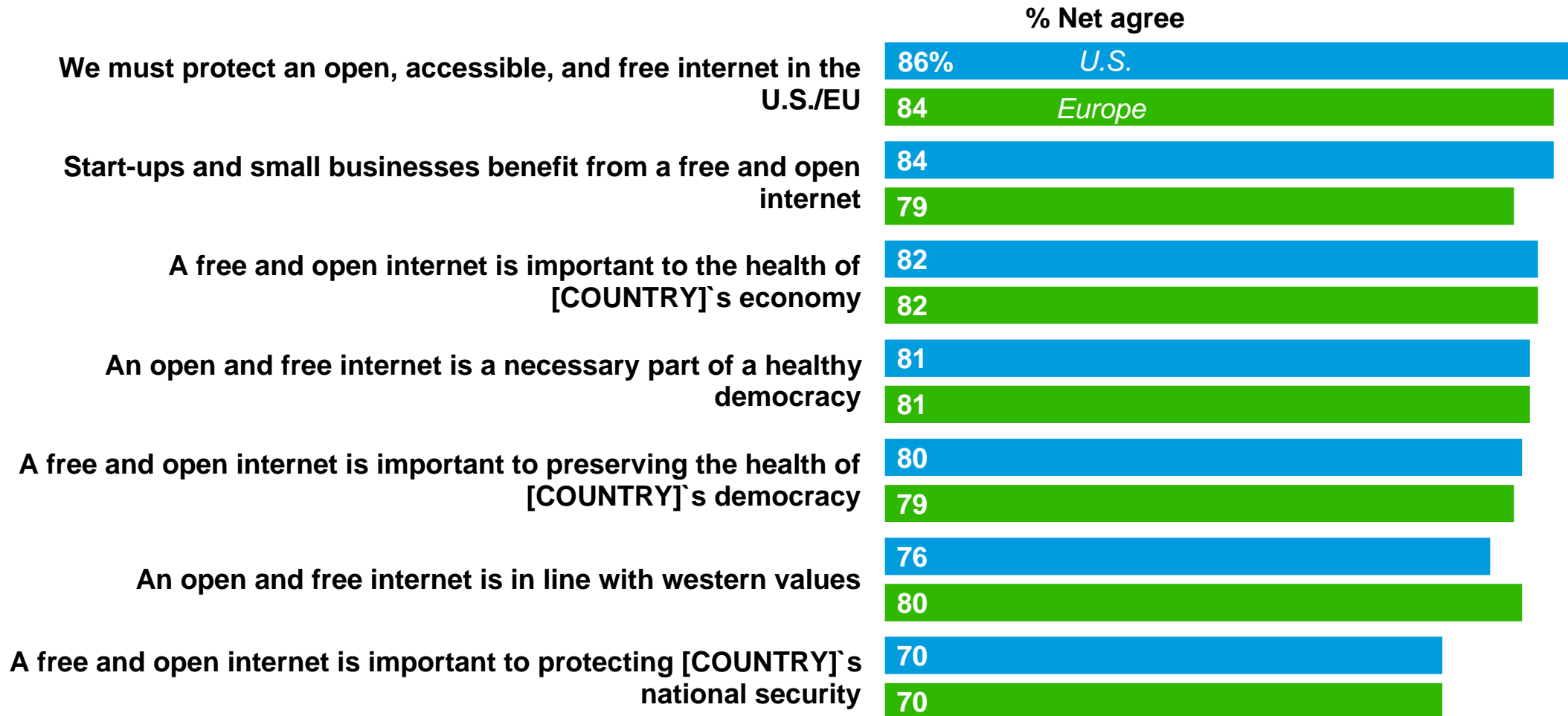
The U.S. and Europe hold positive views of one another; both have a more negative view of China

% describes country

	U.S. Perceptions...		European Perceptions...	
	of Europe	of China	of the U.S	of China
Values human rights	77%	16%	55%	14%
Allows for freedom of speech, even for ideas you disagree with	73%	19%	71%	13%
Encourages open debate	72%	20%	65%	16%
Allows for freedom of expression	71%	21%	70%	12%
Allows for freedom of expression, even for ideas you disagree with	71%	19%	72%	14%
Allows for freedom of speech	71%	16%	69%	12%
Fosters innovation	69%	47%	82%	62%
Allows for a free and open internet	68%	18%	76%	19%
Protects privacy	67%	23%	47%	18%
Makes society more inclusive	65%	28%	53%	33%
Allows for the public to petition the government	64%	18%	61%	18%
Provides a voice to those who wouldn't have one otherwise	64%	21%	51%	17%
Brings people together	64%	17%	54%	24%
Helps low-income communities	60%	21%	32%	21%
Makes it easy to start and grow a small business	58%	25%	67%	35%
Supports surveillance of political opponents	55%	72%	65%	70%
Connects rural areas to the rest of the world	54%	18%	49%	26%
Promotes censorship of ideas	43%	78%	44%	73%
Uses state-sponsored technology companies to discriminate and repress minorities	37%	73%	47%	73%

Western nations agree on the importance of a free and open internet

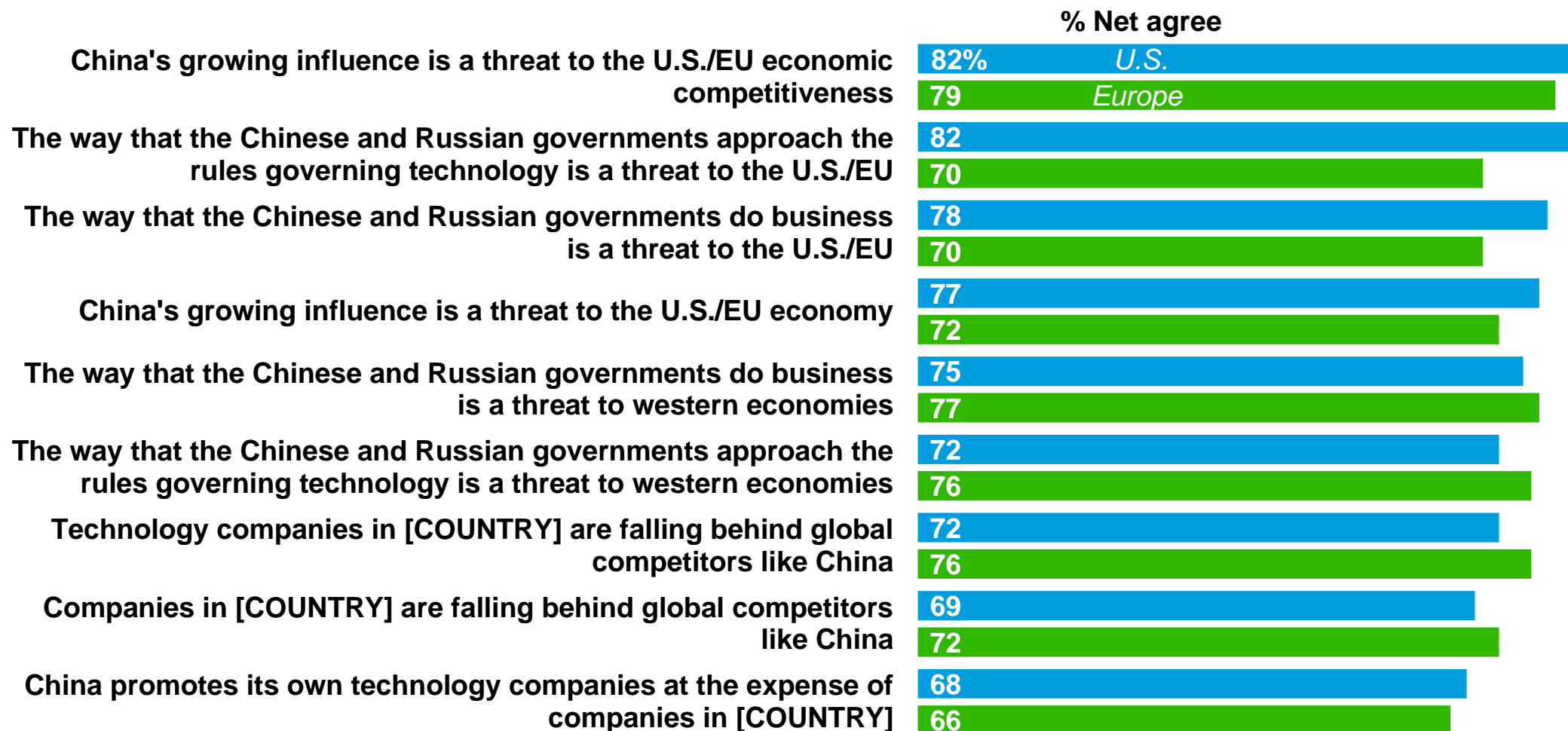
For each of the following statement, please indicate if you agree or disagree.



Threats

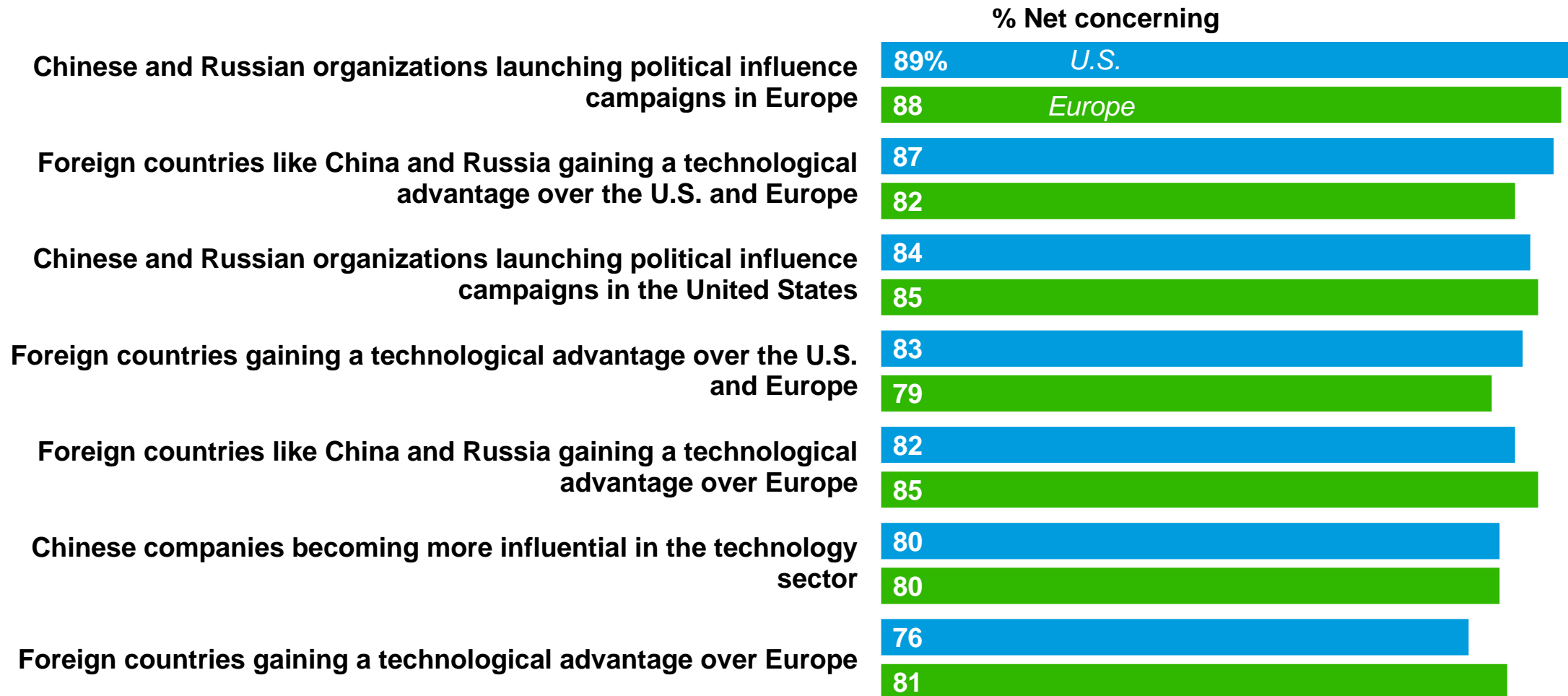
Voters see China and Russia's growing influence as a threat to American and European economic competitiveness

For each of the following statements, please indicate if you agree or disagree.



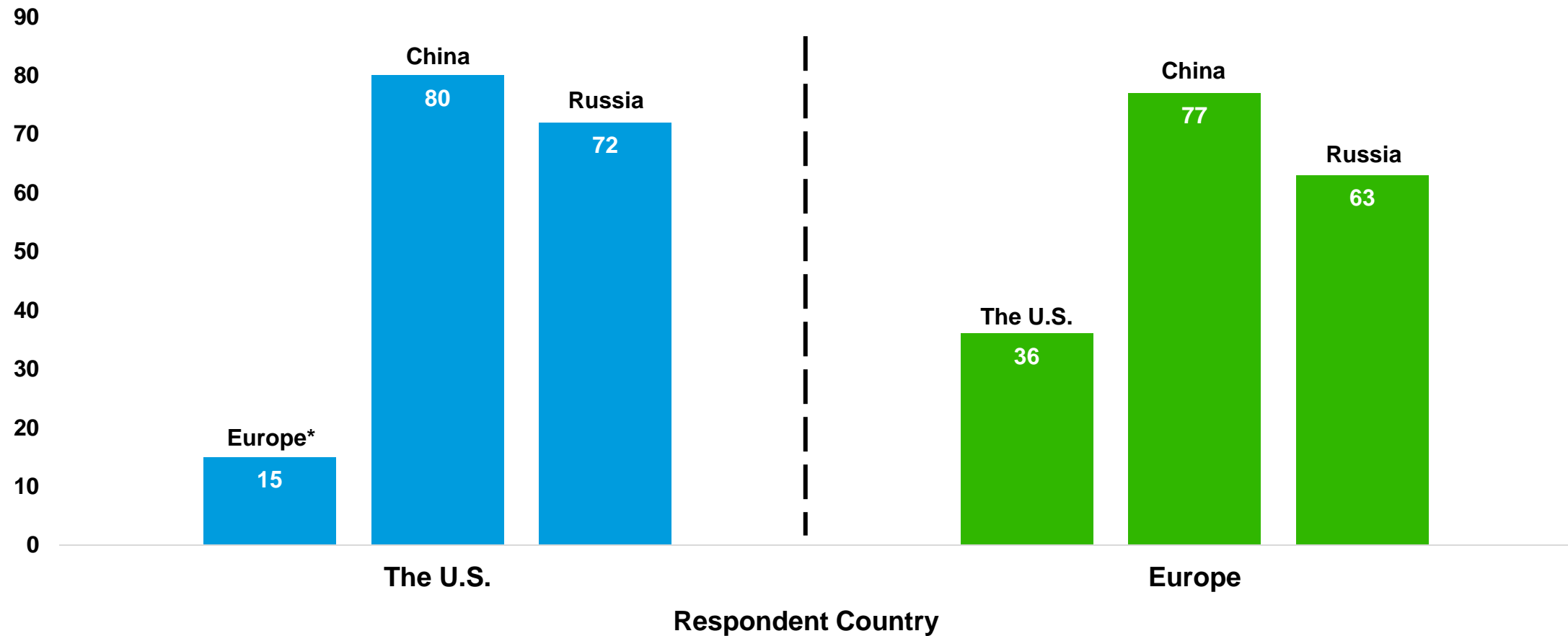
U.S. and European voters share a deep concern about China and Russia's rapid technological and geopolitical ascent

Please indicate how much of a concern each of the following is to you personally.



China and Russia present a threat to Western nations' economic wellbeing

% threat to (U.S. / Europe)'s economic wellbeing

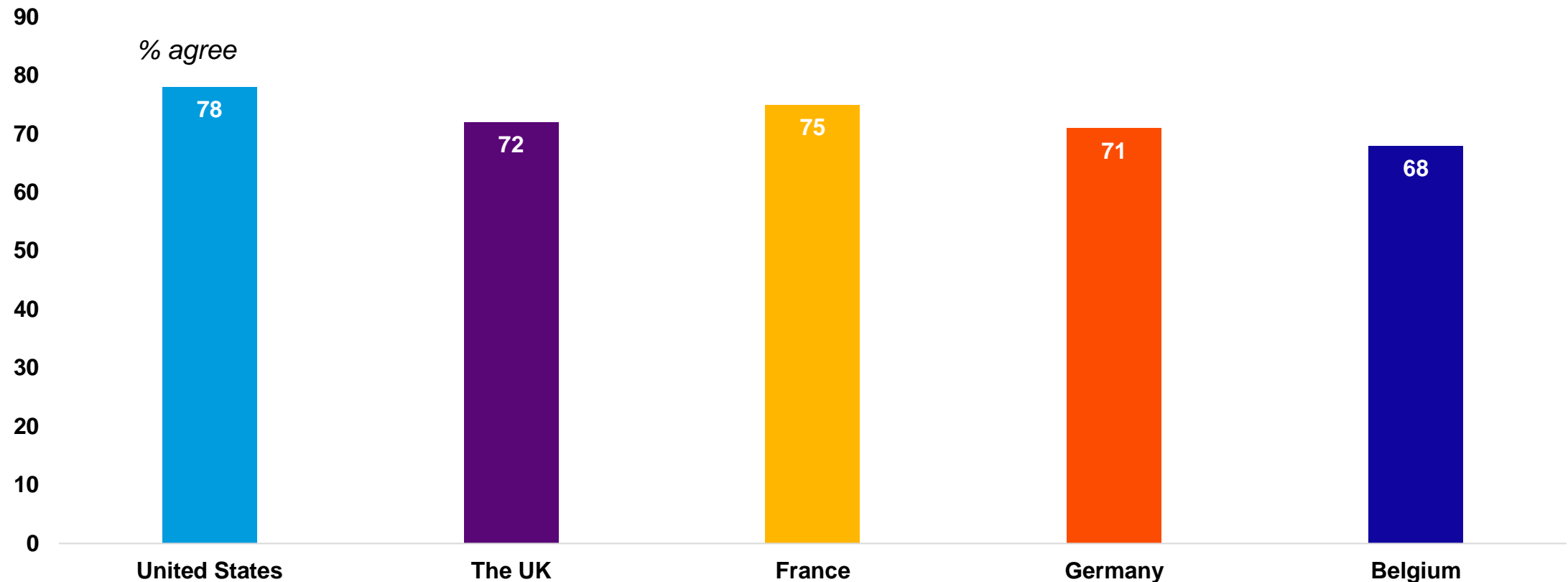


*average of European countries

China and Russia's growing control over the internet threatens U.S. and European economies

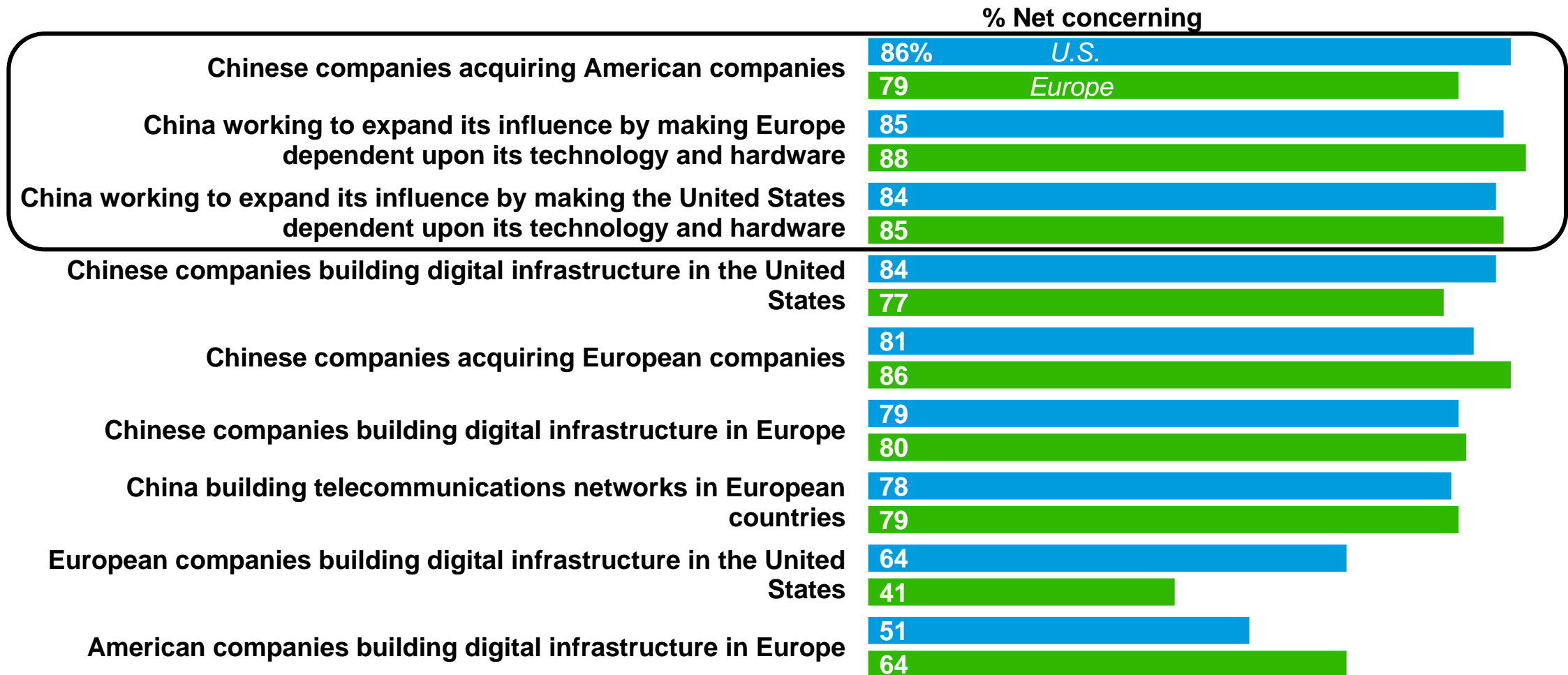
For each of the following statements, please indicate if you agree or disagree.

The more China and Russia control the global internet, the more it will hurt [COUNTRY]'s economy.



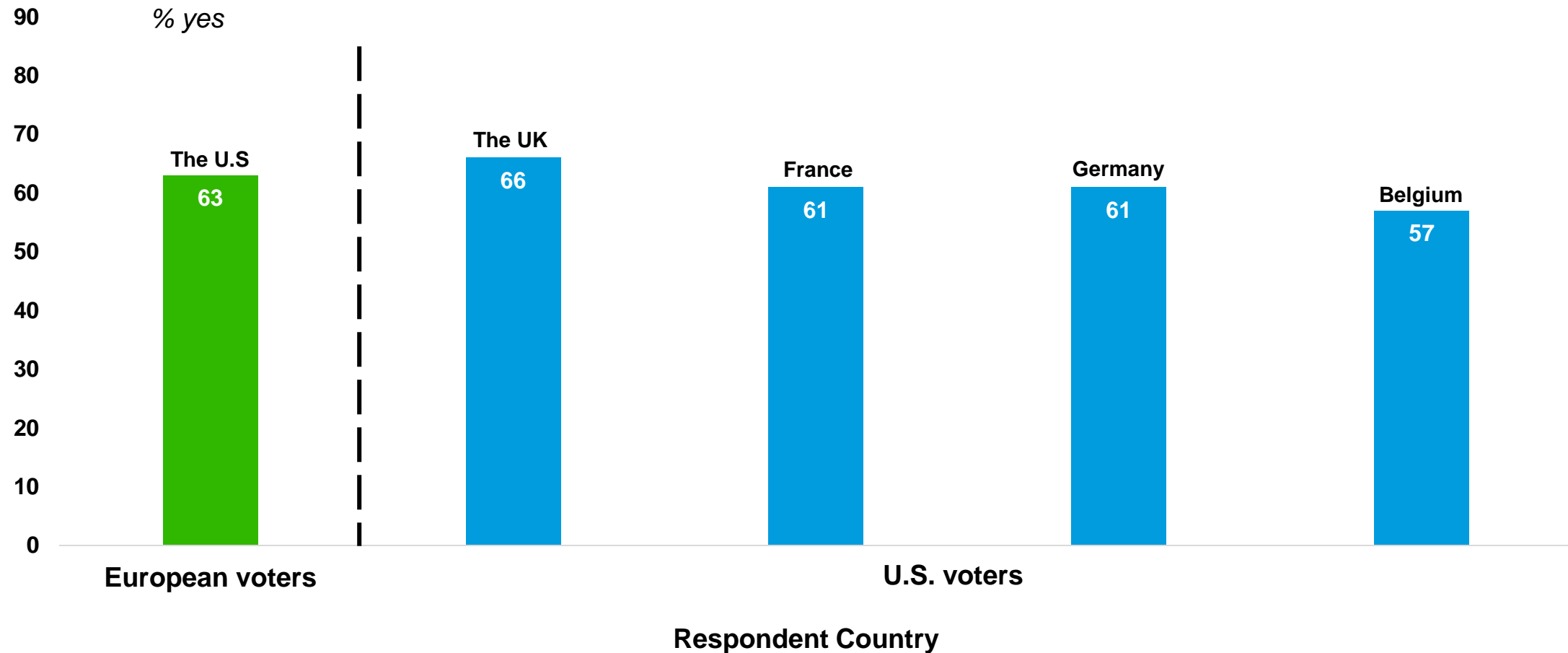
Western nations are also alarmed at the prospect of Chinese foreign direct investment

Please indicate how much of a concern each of the following is to you personally.



The U.S. and Europe also view China as a national security threat

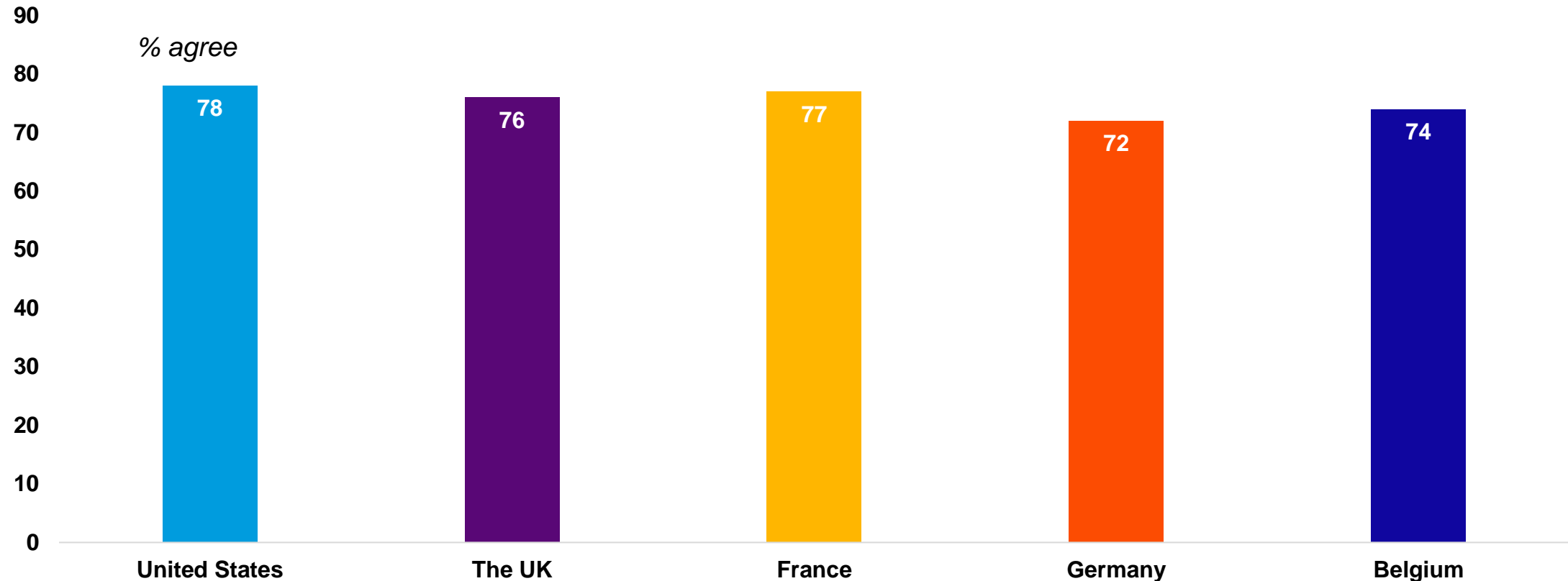
Would you describe China as a threat to [INSERT QUESTION ITEM]'s national security?



There is strong consensus that Western nations' national security will suffer if China and Russia control the internet

For each of the following statements, please indicate if you agree or disagree.

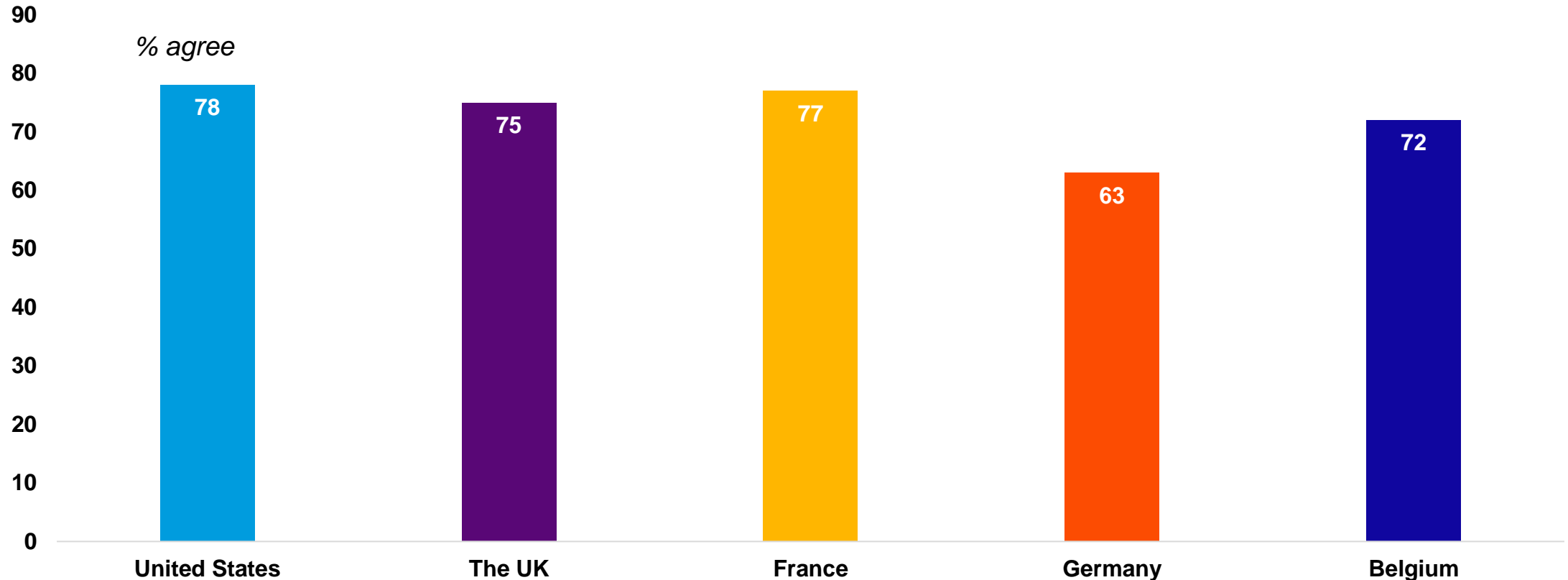
The more China and Russia control the global internet, the more it will hurt [COUNTRY]'s national security.



Voters agree that if China and Russia control the internet, it will hurt Western democracies

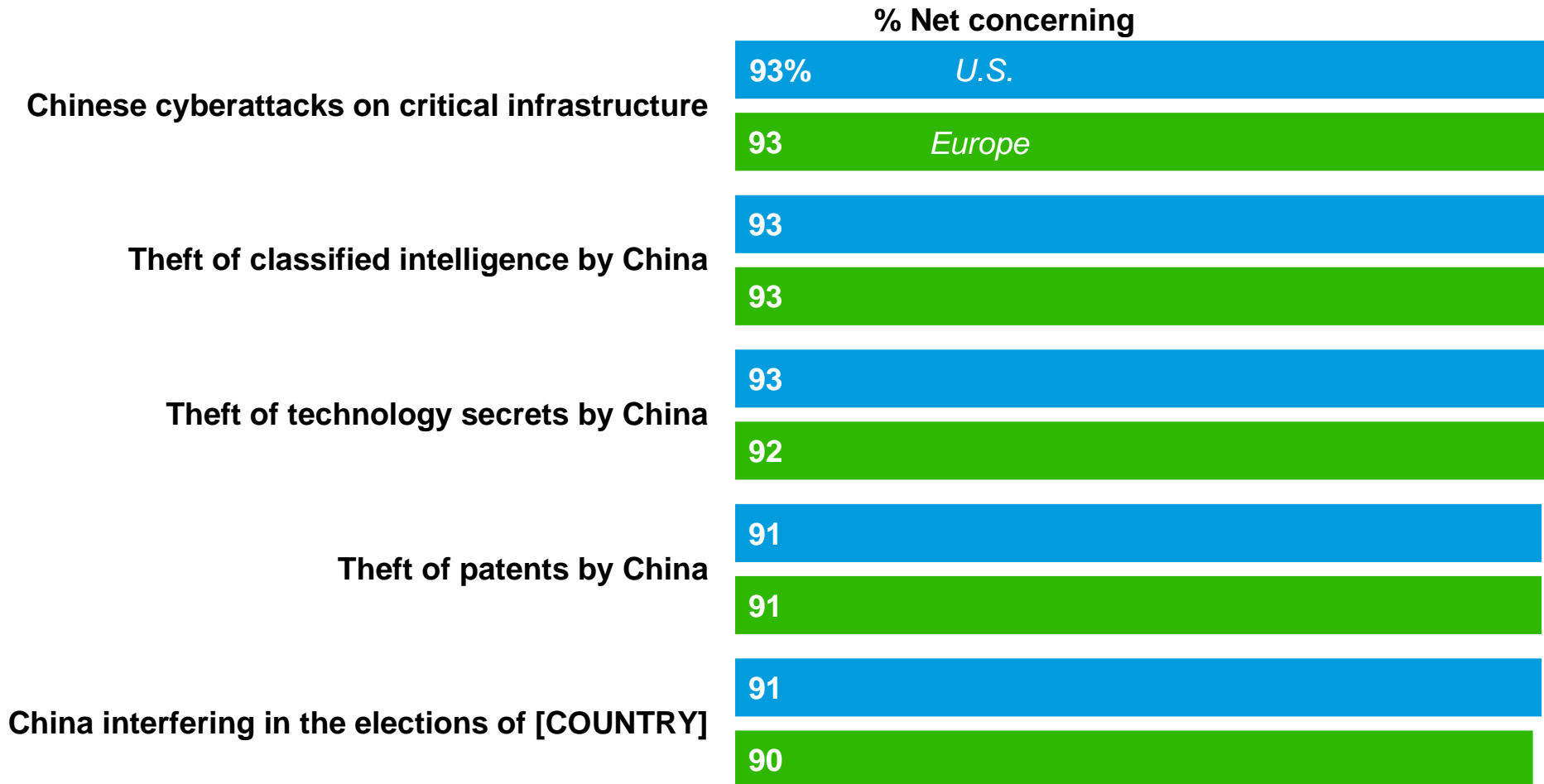
For each of the following statements, please indicate if you agree or disagree.

The more China and Russia control the global internet, the more it will hurt the health of [COUNTRY]'s democracy.



U.S. and European voters associate cyberattacks and corporate espionage with China, and are alarmed at the threat

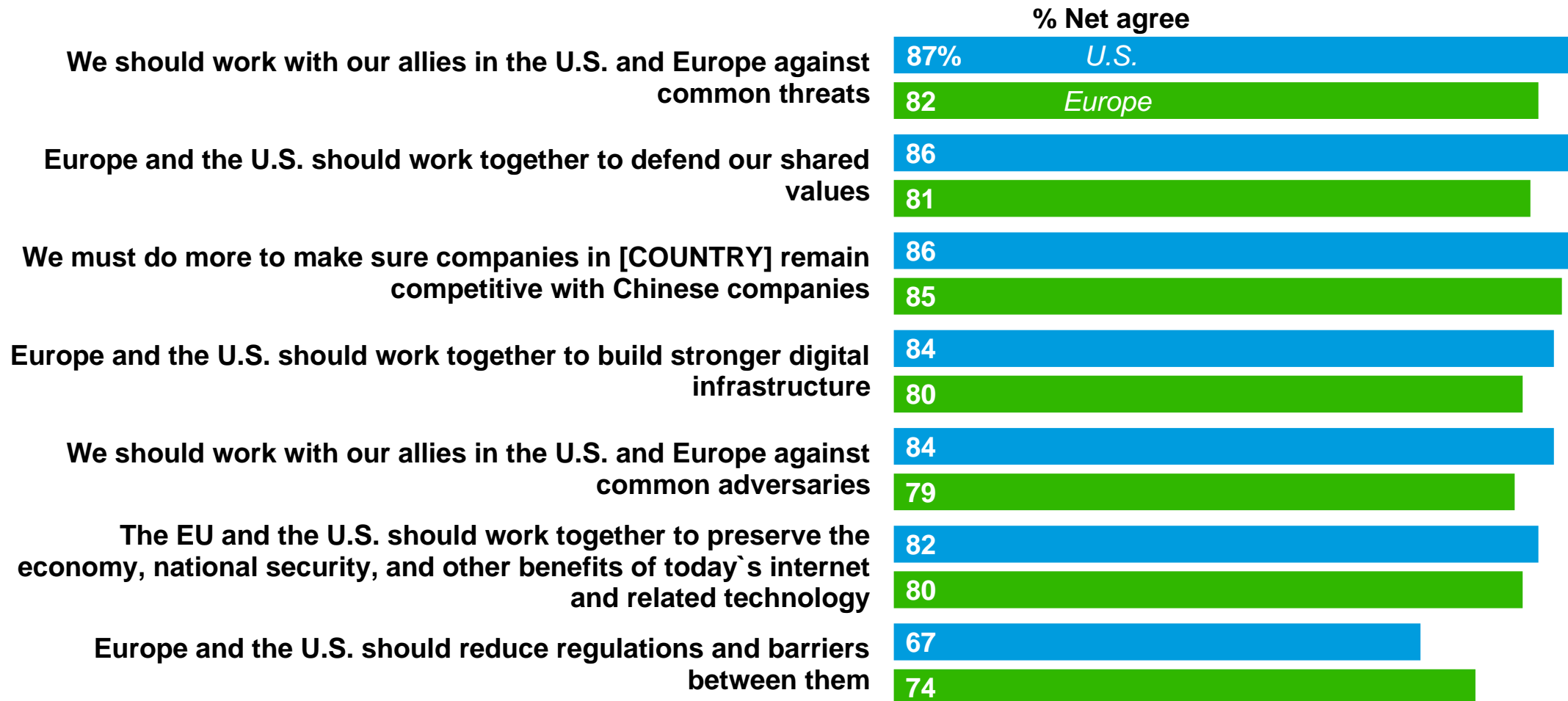
Please indicate how concerning each would be if it were to happen in [COUNTRY].



Opportunities for Transatlantic Cooperation

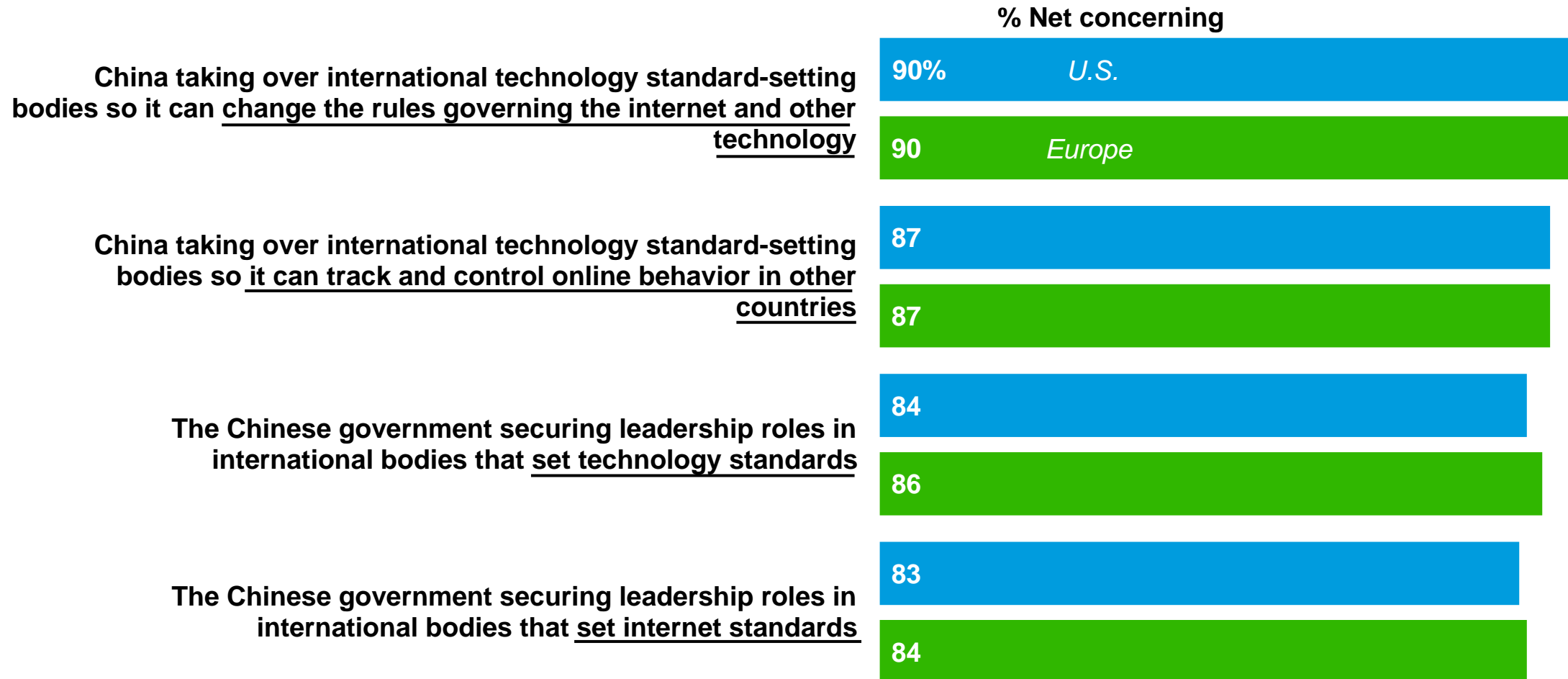
Across the Western alliance, voters strongly want greater cooperation to balance China's rise

For each of the following statements, please indicate if you agree or disagree.



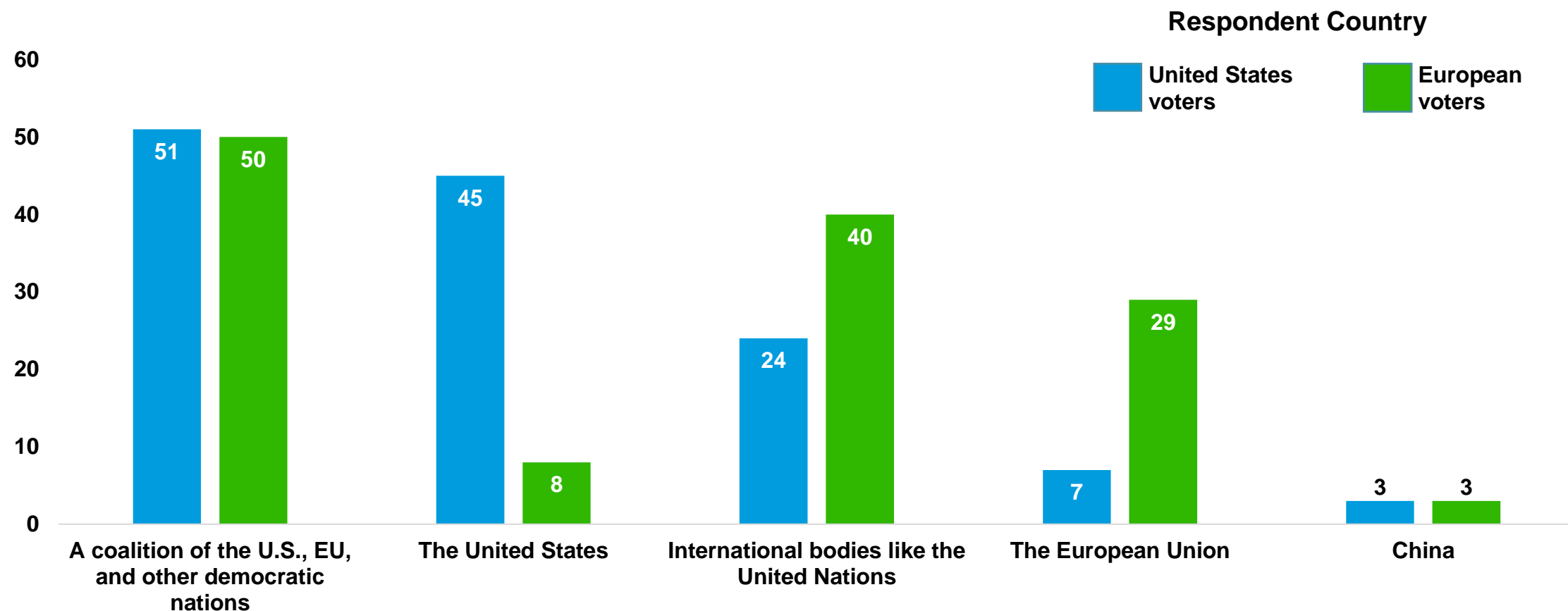
U.S. and European voters overwhelmingly agree that China taking over international technology standard setting bodies would be a concerning development

Please indicate how much of a concern each of the following is to you personally.



There is a strong desire for Western democracies, not China, to set the standards for the internet

In your view, who should be leading the way in setting the rules and standards for the internet? Select up to two.



Takeaways

Conclusions

U.S. and European voters are reaffirming their shared values. Voter sentiment across the surveyed countries indicates that the alliance is fundamentally strong. They believe they share the same values and agree that a free and open internet protects their democracies, economies, and security.

Voters on both sides of the Atlantic have reached consensus that China is a danger that needs to be checked. While American and European voters have a positive view of one another, they are alarmed at the prospect of losing their technological advantage over China and Russia, and see them as adversaries that threaten their security, prosperity, and way of life. They believe that the more China and Russia control the global internet, the more they are all imperiled.

They are calling for greater cooperation to balance the China threat. Over four-in-five voters believe Europe and the U.S. should work together to defend their shared values, confront common threats, and preserve the economic and security benefits of today's internet technologies. To do so, they want a coalition of democratic nations to set the rules and standards for the internet.