

# TT 20 20

# Transatlantic Trends 2020

Transatlantic opinion on global challenges  
before and after COVID-19





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# Methodology

## Fieldwork Period

Fieldwork was conducted in all three countries January 9-22, 2020 for wave one and May 11-19, 2020 for wave two.

## Sample Definition

A nationally representative sample of the population aged 18+ was interviewed in each of three countries: France, Germany and the United States. Sample sizes were:  
Wave 1: France 1004; Germany 1001, United States 1001 respondents.  
Wave 2: France 1000; Germany 1001; United States 1000.

## Collection Method

Interviewing was conducted by Kantar Public via an online survey, using recruitment via online response panels. Representativity in sampling was ensured via four sets of quotas in each country on the following criteria, based on standard national representative sampling practices in each country:  
Age and gender (all countries)  
Region (all, according to local standards)  
Socio-professional category (France only)  
Education level (Germany only)  
Household income (U.S. only).

# Foreword

2020 has been marked by an unprecedented series of political, economic, and societal shocks that have tested the resilience of the transatlantic relationship. From the coronavirus pandemic and its global implications, to regional issues such as the risk of military escalation with Iran, to purely transatlantic matters like the withdrawal of U.S. troops from Germany, the United States and Europe have experienced a multiplicity of crises that challenge the terms of the transatlantic partnership.

At the same time, the strategic competition between the United States and China has become more central in world affairs. For communities on both sides of the Atlantic, the coronavirus crisis has revealed the rise of China's political and economic influence. While the U.S. is gearing up to face this new geopolitical environment, Europeans have yet to define their role and strategic ambitions.

The transatlantic community can play an essential role in meeting these challenges, but for us to work in common purpose, we need to understand how those challenges look to our respective societies. That insight—the need to anchor this cooperation in the perceptions and desires of the population—is at the core of the Transatlantic Trends project.

This edition of Transatlantic Trends includes the results of surveys conducted in the U.S., France, and Germany, first in January 2020 and then again in May, in order to gauge the

impact of the pandemic on the public perceptions of different foreign policy issues. The original data provided by this report is meant to be a helpful tool for policymakers, the media, the business sector, and researchers. It also aims at fostering relevant debates, strengthening mutual understanding, and building a positive agenda for transatlantic cooperation.

This research is not just transatlantic in focus—it is a true transatlantic collaboration between our three organizations. The findings in the pages that follow benefit in intellectual richness from the diversity of perspectives that informed everything from framing the questions to interpreting the resulting data.

Divided into five chapters, Transatlantic Trends provides a detailed picture of transatlantic public opinion on core and contemporary issues: the transatlantic relationship, international security and defense, international trade, relations with China, and digital issues.

We are confident that these findings will advance the transatlantic conversation and meaningfully contribute to mutual understanding. As a community of shared values, the transatlantic alliance will be able to meet the challenges of 2020 and beyond by building on the priorities and interests expressed by its people.

Irene Braam

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# Summary of key findings

## Differing perceptions of Europe across the Atlantic

Americans perceive the UK as the leading power in Europe, whereas French and Germans view Germany as the leader.

## United States perceived as most influential global power

but by fewer respondents in all three countries after the outbreak of the COVID crisis.

## French and Germans see climate change as the top transatlantic priority

both before and after the pandemic, while Americans think health crises cooperation is most important.

## Support for a transatlantic trade agreement high in all three countries

with virtually no change after the COVID outbreak.

## China generally perceived as a threat to be reckoned with more firmly

particularly on cybersecurity, human rights, and climate change—and deemed more influential but also seen more negatively after COVID.

## A majority of Americans and Germans believe the United States should be involved in European security

while the French are more skeptical.

## There is consensus in favor of higher taxation of U.S. tech companies

with French being most eager.

## The French are showing war fatigue, while Germans and Americans express stronger appetite for more international engagement.

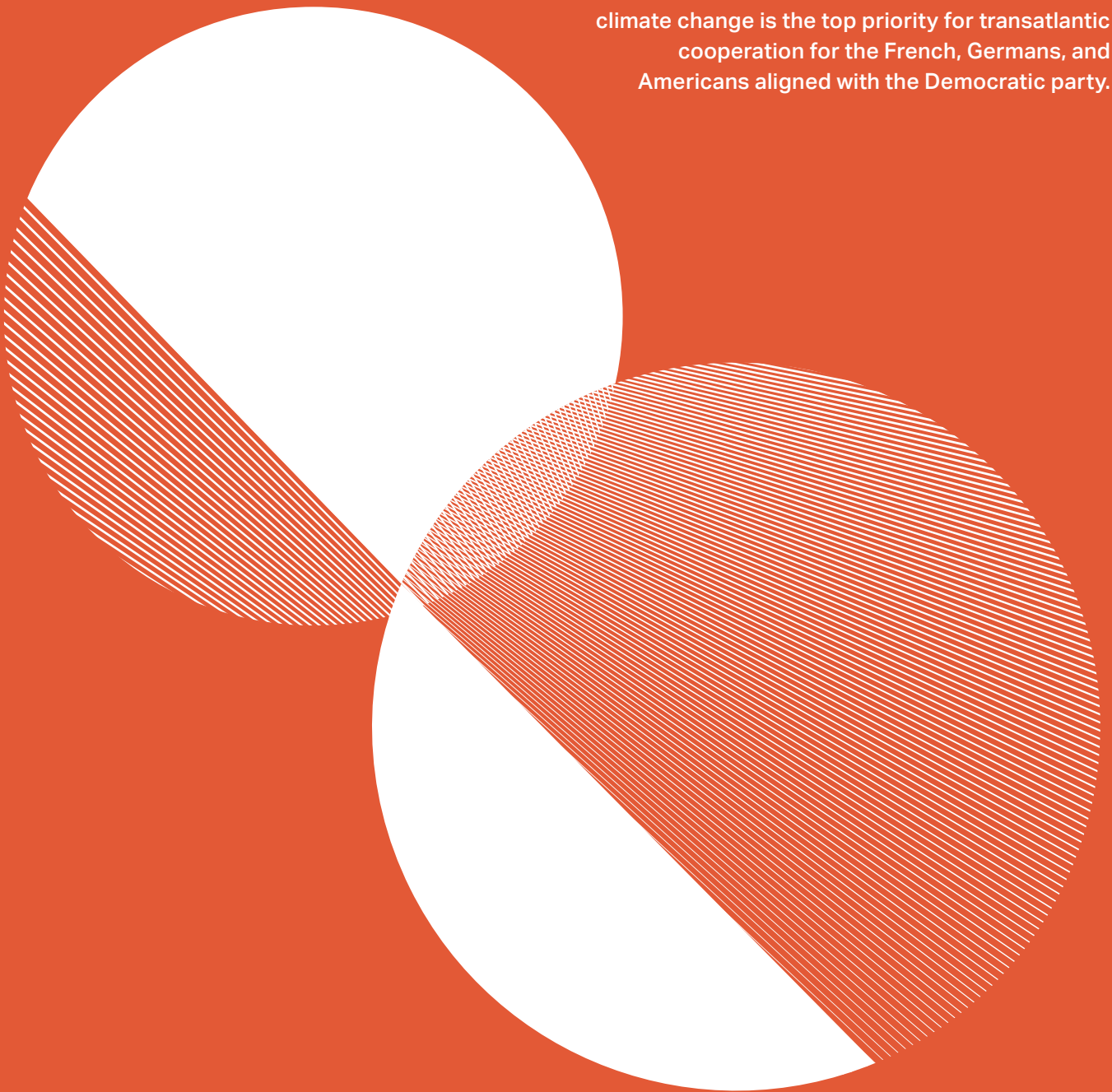
## Content regulation most often seen as the responsibility of social media companies

but without a clear consensus in France and Germany, where respondents think national governments and the EU should play a role.

# The state of transatlantic relations

Despite focus on China's global influence in recent years, it still fails to rival the United States—even after a significant pandemic bump. Nonetheless, it would seem that China and Germany are on the rise, while the European Union, France, and the United States are slipping.

Even in the midst of the coronavirus crisis, climate change is the top priority for transatlantic cooperation for the French, Germans, and Americans aligned with the Democratic party.

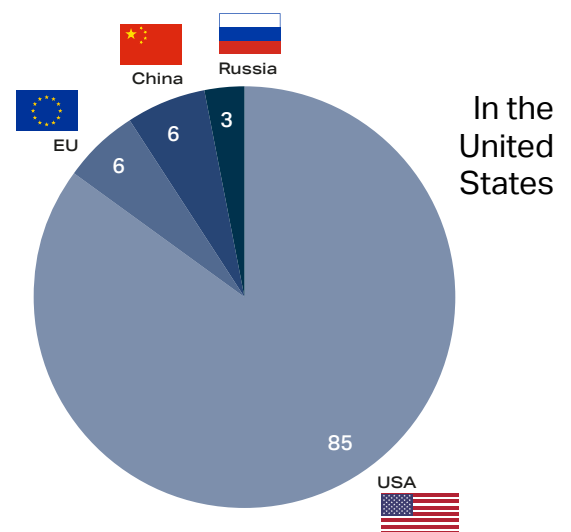
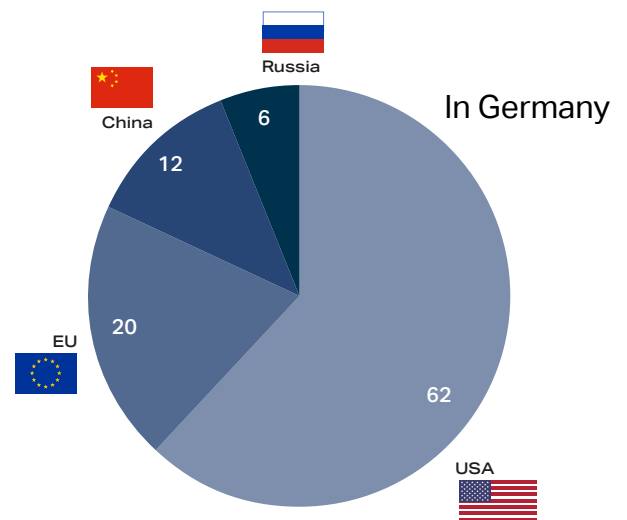
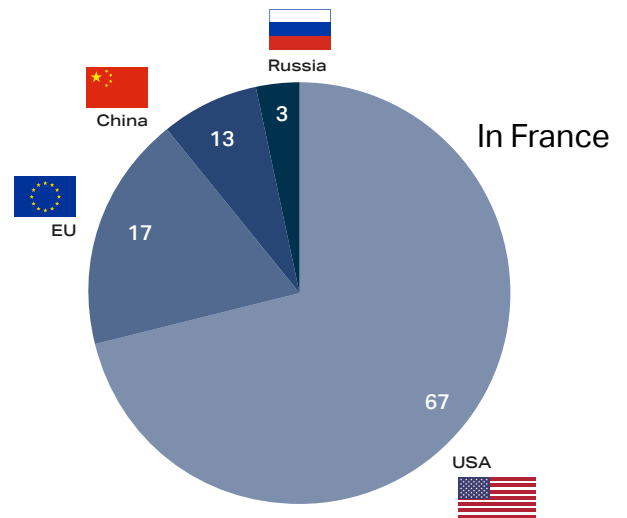


# Which actor is currently the most influential in global affairs?

Before the pandemic, there was a consensus that the United States was the most influential country globally. China and the EU were nearly tied in second place. After the crisis, the United States is still deemed most influential, but China's influence has risen significantly.

It is notable—while not surprising—that the coronavirus crisis seems to have elevated China's perceived influence in global affairs across all three countries. The proportion of respondents who said China was the most influential doubled between January and May 2020: from 13% to 28% in France, from 12% to 20% in Germany, and from 6% to 14% in the United States.

Before the coronavirus crisis, super majorities agreed on U.S. global influence (85% of Americans, 62% of Germans, and 67% of French). Among Americans, China and the European Union were tied for second, with only 6% of Americans considering them most influential. Germans and French had a slightly more multipolar view of the global influence, but for both the European Union came in second (ranked most influential by 17% of French and 20% of Germans) with China following, deemed most influential by 13% of French and 12% of Germans.

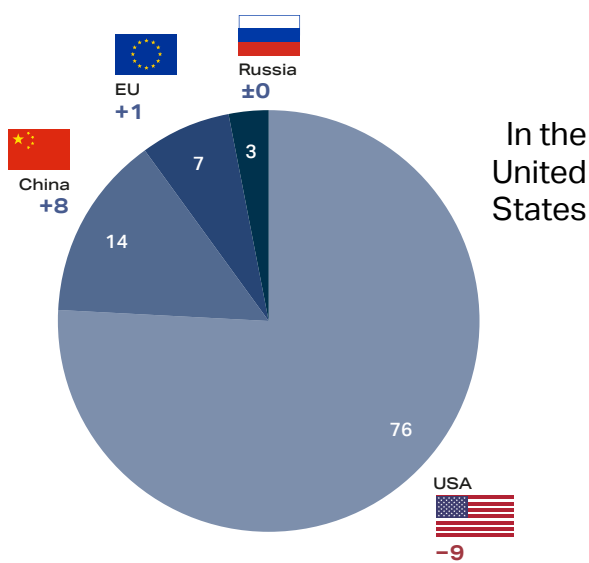
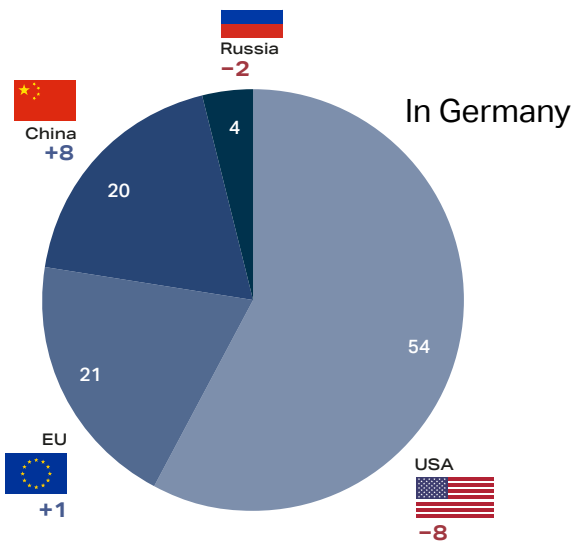
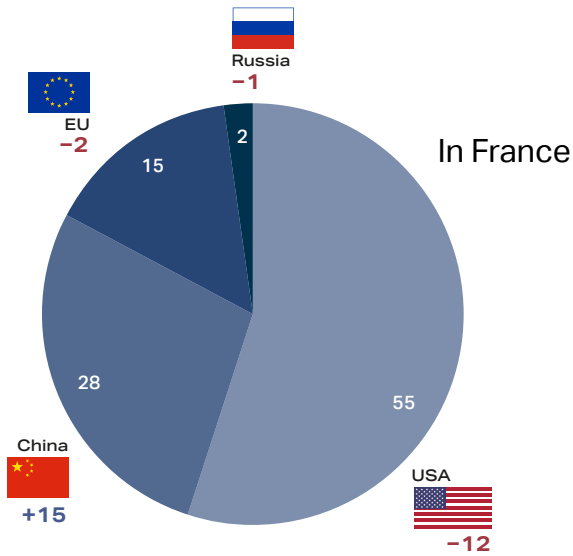


*Original question: "Rank the following in order of which you think is most influential to least influential in global affairs currently." Depicted are responses for rank 1, most influential.*

## BEFORE COVID-19

Sample: France 1004; Germany 1001; USA 1001. Expressed in % rounded up to the next unit for decimals .5 and higher.





**AFTER COVID-19**

Sample: France 1000; Germany 1001; USA 1000. Expressed in % rounded up to the next unit for decimals .5 and higher.

Opinions diverged over Russia's influence. Twice as many Germans thought Russia was the world's most influential power than the Americans or French: 6% of Germans said it was most influential and 36% thought it was first or second most influential, while in France and the United States only 3% ranked it first and only 20% of Americans or 22% of French thought it was most or second-most influential, placing it a distant fourth to the European Union and China.

After the coronavirus outbreak, Americans, French, and Germans still place the United States at the top of the influence chart, but with an 8-12 point drop from four months earlier (falling 12 points in France and 8-9 in Germany and the United States). These points and more have gone to China, which now clearly takes second place for French and American respondents, ranked most influential by 28% of French and 14% of Americans. China is ranked first or second most influential by 64% of French (up 17 percentage points) and 59% of Americans (up 12 points).

Germany's distinct view of the balance of power remains: although China's perceived influence has increased (from 12% to 20% seeing it most influential), more Germans, barely, still think the EU is more influential than China (21% of Germans rank EU first, a 1 point increase since January).

While all respondents' perception of China's influence has increased during the pandemic, in France, the shift is strongest.

# Which country is most influential in Europe?

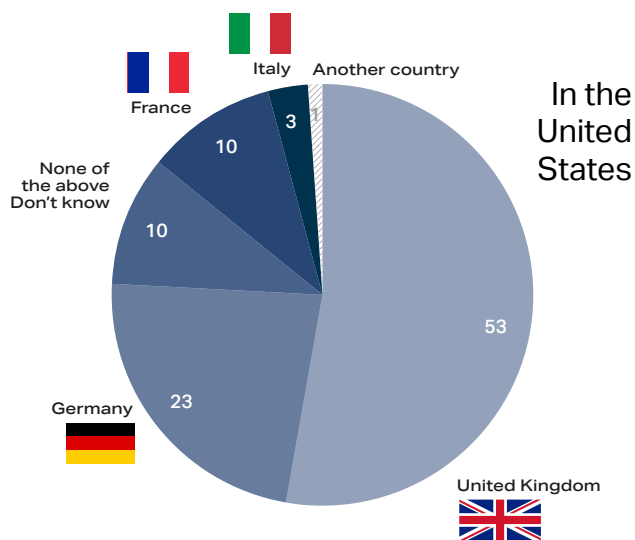
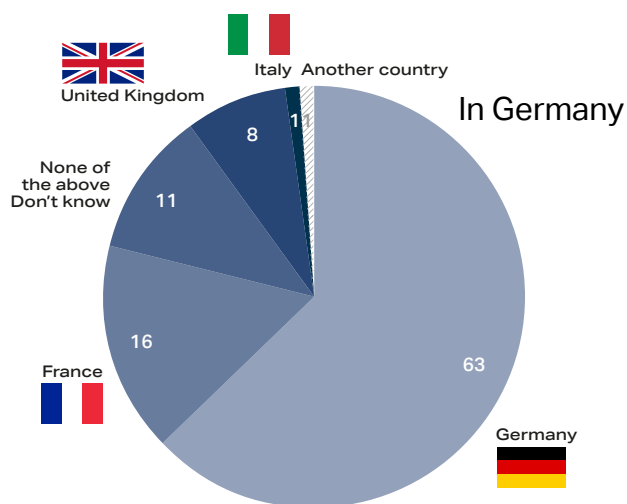
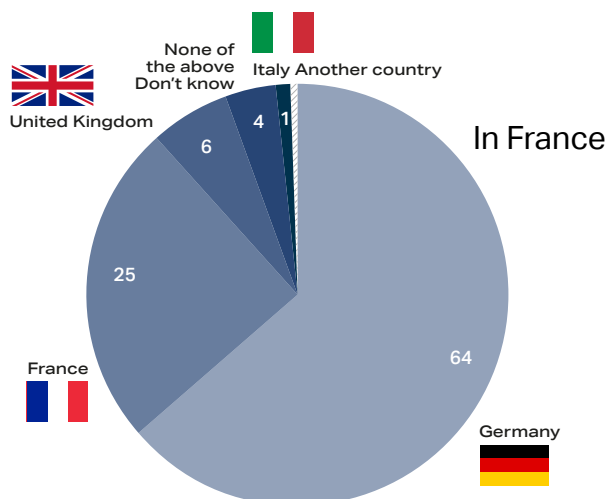
Americans have an outlier view, believing the UK to be the most influential country in Europe (both before and after the pandemic), whereas in both Germany and France, Germany is the clear leader. Germany's influence has risen across the board since January.

Perceptions of influence in Europe have not changed markedly with the coronavirus crisis. However, the gap between France and Germany's perceived influence has grown since the COVID crisis began, with France sinking and Germany rising across the board.

In January, Germany was clearly perceived as the most influential European power in both Germany (63%) and France (64%), with dramatic generational differences. Older French respondents were twice as likely to see Germany as more influential than their compatriots ages 18 to 24 (80% of 55+ respondents vs. 39% of 18-24 year olds). Younger French respondents perceived their country to be more influential in Europe (41% of those ages 18-24). Similarly, younger Germans think Germany is more influential: 72% of those ages 18-24, compared to 57% of Germans 55 and older.

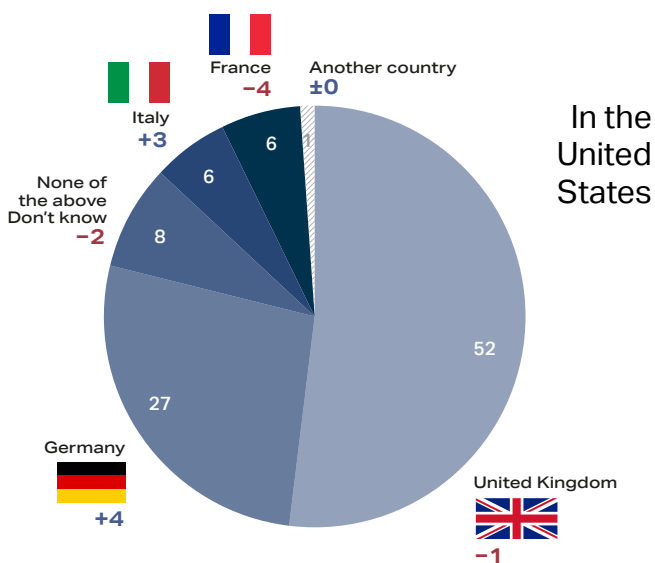
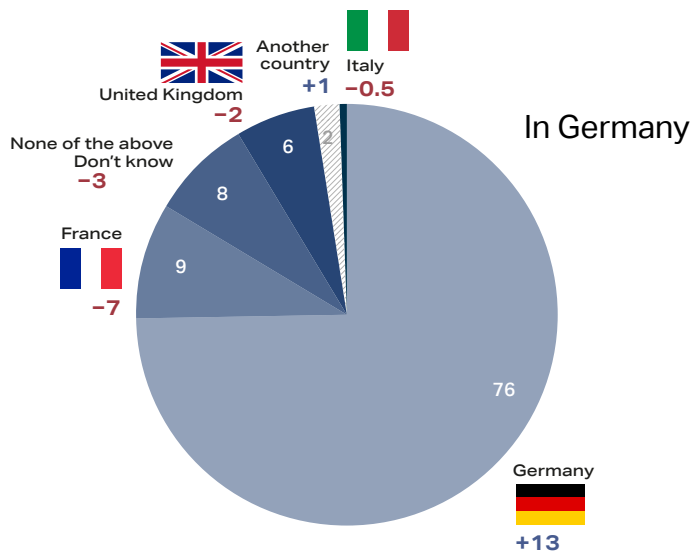
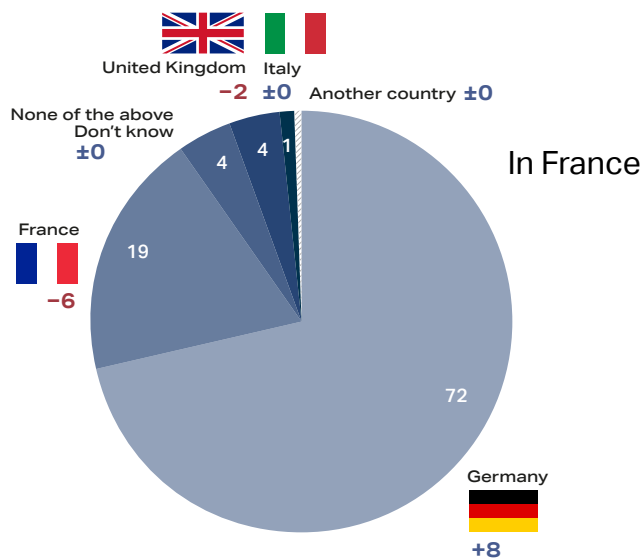
In contrast, slightly more than half of Americans viewed the UK as the most influential country in Europe (53%), a perception only shared by 8% of German and 6% of French respondents. Clearly, the U.S.-UK special relationship is still shaping Americans' view of Europe.

Which of these countries would you say is the most influential in Europe?



BEFORE COVID-19

Sample: France 1004; Germany 1001; USA 1001. Expressed in % rounded up to the next unit for decimals .5 and higher.



**AFTER COVID-19**

Sample: France 1000; Germany 1001; USA 1000. Expressed in % rounded up to the next unit for decimals .5 and higher.

The general views did not drastically change with the pandemic. Germany is still deemed most influential by French and Germans. But the perception of Germany's influence has risen in all three countries (+8 points in France, +13 points in Germany, and +4 points in the United States) while France has slipped, by six points for French, seven for Germans, and four for Americans. The generational gap among French respondents is still present: 50% of French ages 18-24 believe that France is the most influential country in Europe, whereas 90% of French 55 and older think Germany leads Europe. Americans' perception of the UK's influence in Europe has not evolved with the crisis; it is still perceived as most influential by 52% of Americans, while over a quarter see Germany as Europe's leader (up 4 points since January).

It appears that President Macron's efforts to reassert French leadership in Europe have not convinced the French, especially the older ones, nor Germans or Americans. The fact that Germany is widely thought to have managed the coronavirus crisis well may have boosted its standing among respondents.

# Which issues are most important for transatlantic cooperation?

Before COVID-19, French and Germans prioritized cooperation on climate change, while Americans were split between climate change and counterterrorism intelligence sharing. After the pandemic, cooperation on health crises is most important for Americans.

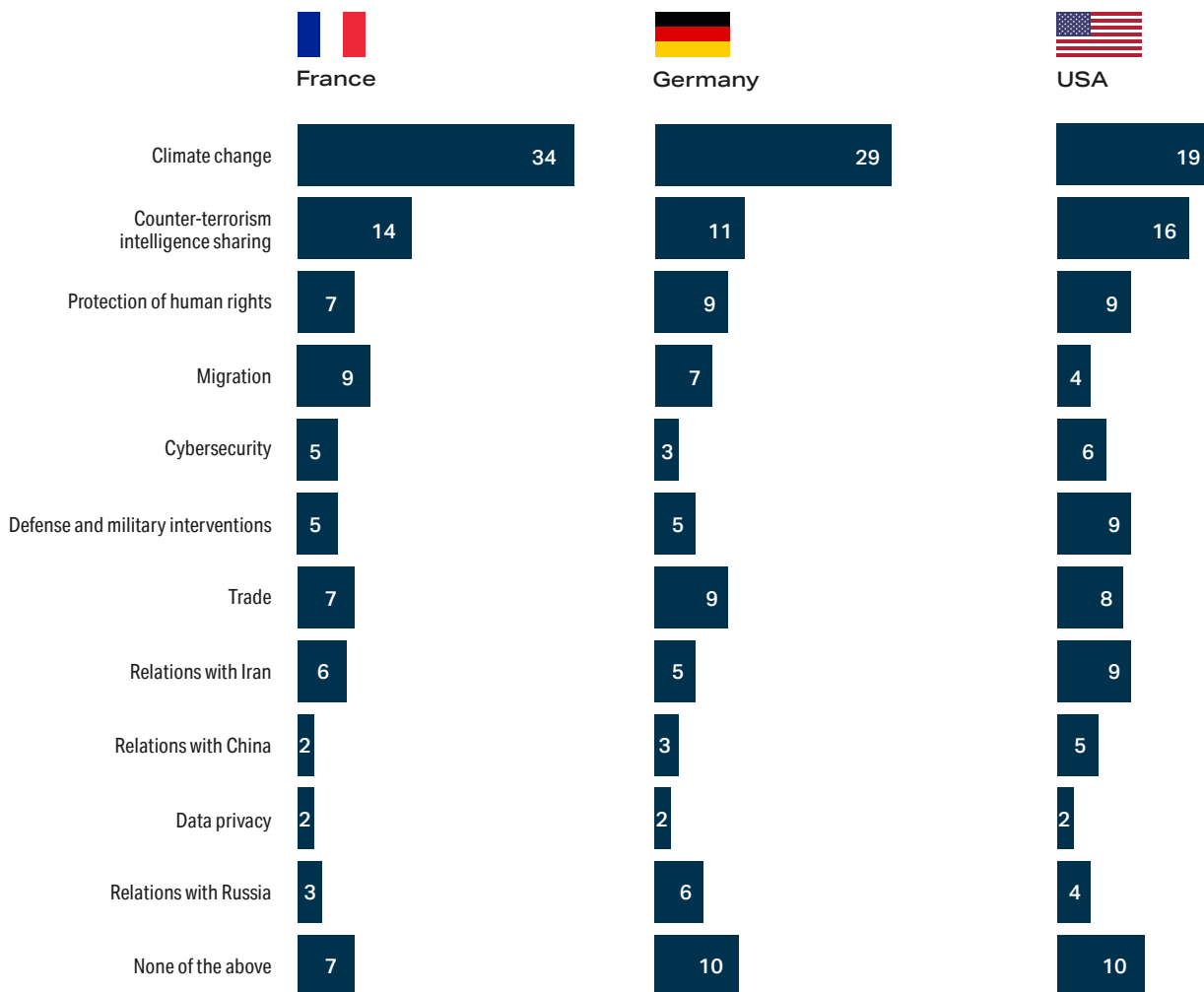
The pandemic changed priorities for Americans more than its partners. Far fewer French and German respondents see health

cooperation with the United States as a priority, and Germans' priorities for transatlantic cooperation are almost unchanged by the coronavirus crisis. With economic downturn looming, respondents from all three countries now place increased importance on trade.

In January, a plurality of French (34%) and German (29%) respondents believed that climate change was the most important issue for the United States and the EU to cooperate on. Counterterrorism intelligence sharing was a distant second, named top priority by 14% of French and 11% of Germans. In contrast, Americans' priorities for cooperation were more divided, with climate change (19%) and counterterrorism intelligence sharing (16%) at the top.

Younger Americans were more interested in cooperation on climate change than older Americans (25% of 18-24 year olds vs. 19% of those ages 55+). There was also a partisan divide,

Which of the following issues do you think it is most important for the U.S. and the EU to cooperate on?



## BEFORE COVID-19

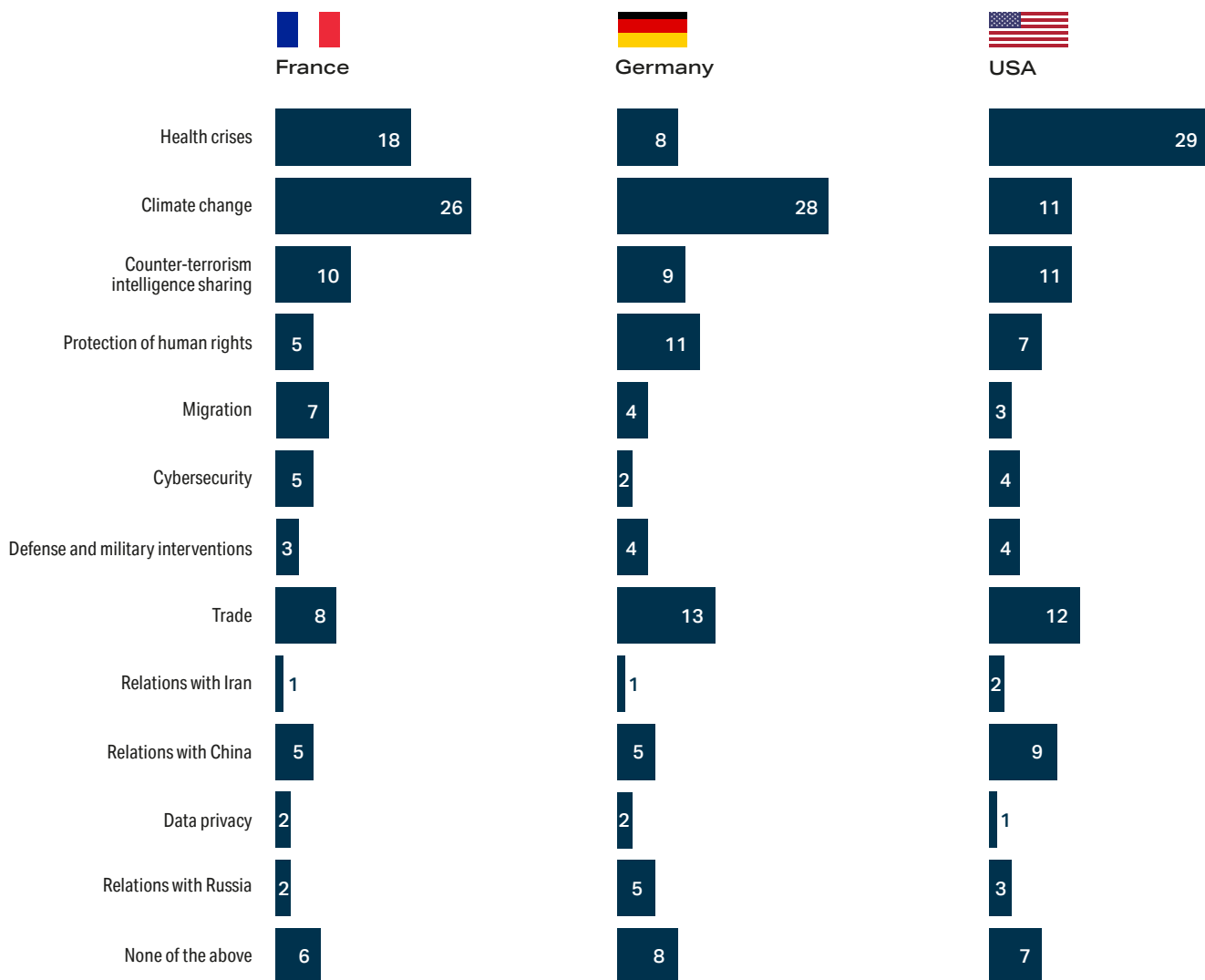
with Democrats three-times more likely to prioritize climate change than Republicans (33% D vs. 11% R).

In the second wave of this survey conducted in May, cooperation on health crises was added to the list of issues, yet a plurality of French (26%) and German (28%) respondents still rank cooperation on climate change as the top priority. Health crises come second in France (18%). In contrast, only 8% of Germans believe that health crises are the main issue requiring transatlantic cooperation.

Results changed more dramatically in the United States between January and May. A third of Americans (29%) now consider health crises the main issue for transatlantic cooperation. In the United States and Germany, the second most important issue for transatlantic cooperation is now trade (at 12% and 13%), having risen 4 percentage points in both countries since

January. In France, trade cooperation climbs up the list, with 8% now higher-priority than migration or human rights protection.

Notably, this question asks which issues the allies should work together on, not what issues are most important in general, with interesting consequences. Amid the coronavirus crisis, Americans are looking to cooperate with Europeans, but German and French respondents seem to see less incentive to work with Washington on health issues. The pandemic has not distracted French and German publics from the need for transatlantic cooperation on climate change.



AFTER COVID-19



# International security and defense

Support for NATO and a U.S. role in European security and defense remains high, especially in Germany and the United States, with strong bipartisan American support.

The pressure campaign for higher defense spending in Germany seems to be working. Public support for increasing defense spending is highest in Germany, and most divided in the United States.



# What is the most important global challenge for your country to address?

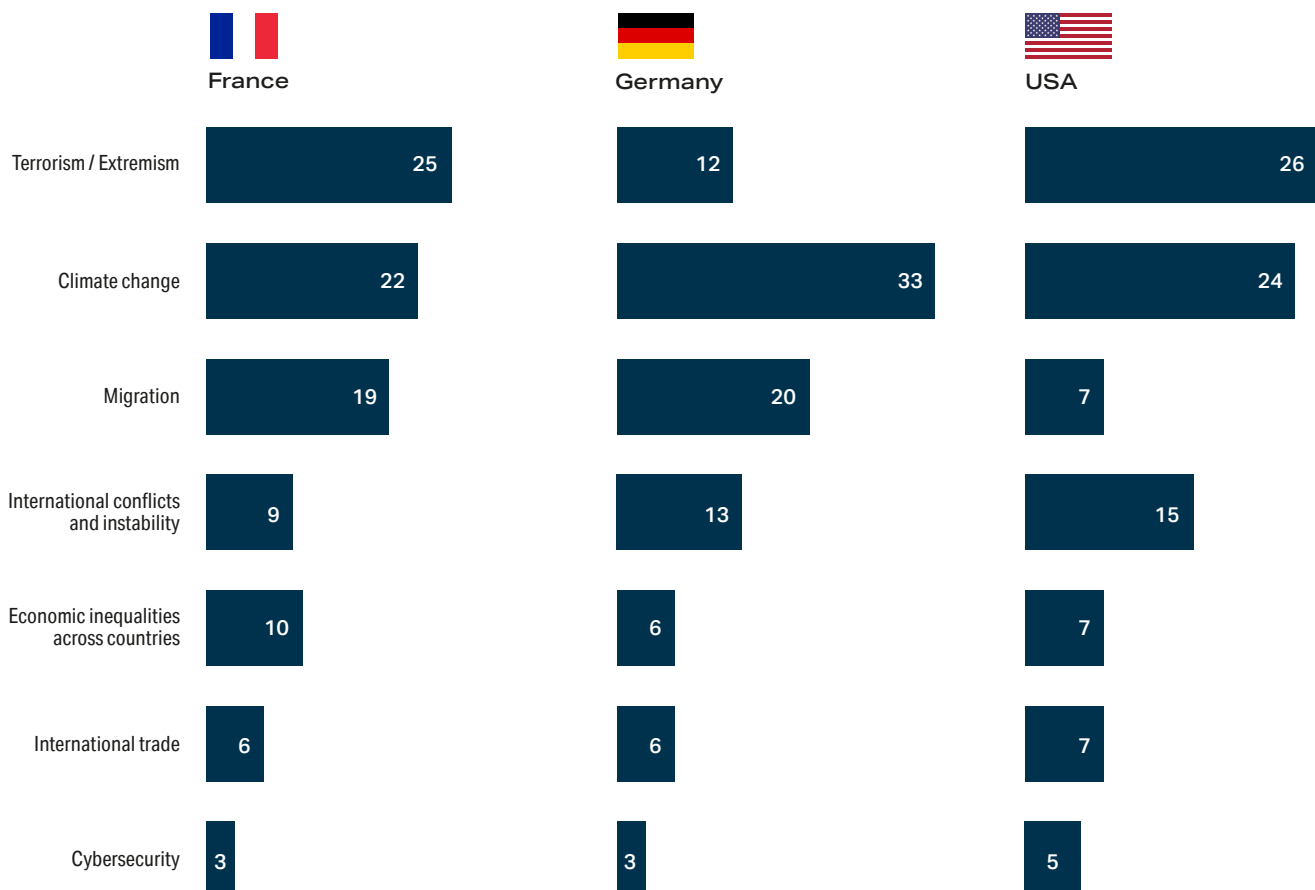
Before the pandemic, Germans viewed climate change as the top global challenge. For French and Americans terrorism/extremism was first and climate change second. Now all respondents see health crises as the most important global challenge to address.

The prioritization of global challenges has changed in all three countries between January and May. The global impact of the

pandemic seems to have pushed other global challenges to the background, although in Germany climate change is still considered a current and important global issue.

In January, Germans had the clearest top priority, with a third of respondents placing climate change first, followed by migration at 20%. Terrorism and extremism—top priority for the French and Americans (25-26%)—ranked a distant fourth in Germany (12%). Germans who indicated a party affiliation tended to follow party lines, with 64% of Green voters placing climate change on top of the list, while half of AfD voters believed migration to be the biggest challenge (50%). Respondents were more conflicted in France and the United States where a nearly equal amount ranked either terrorism or climate change first (26% for terrorism and extremism in both countries and 24% of Americans and 22% of French prioritized climate change).

What do you think is currently the most important global challenge for your country to address?  
(Responses "none of the above" and "Relations with another country" are not included.)



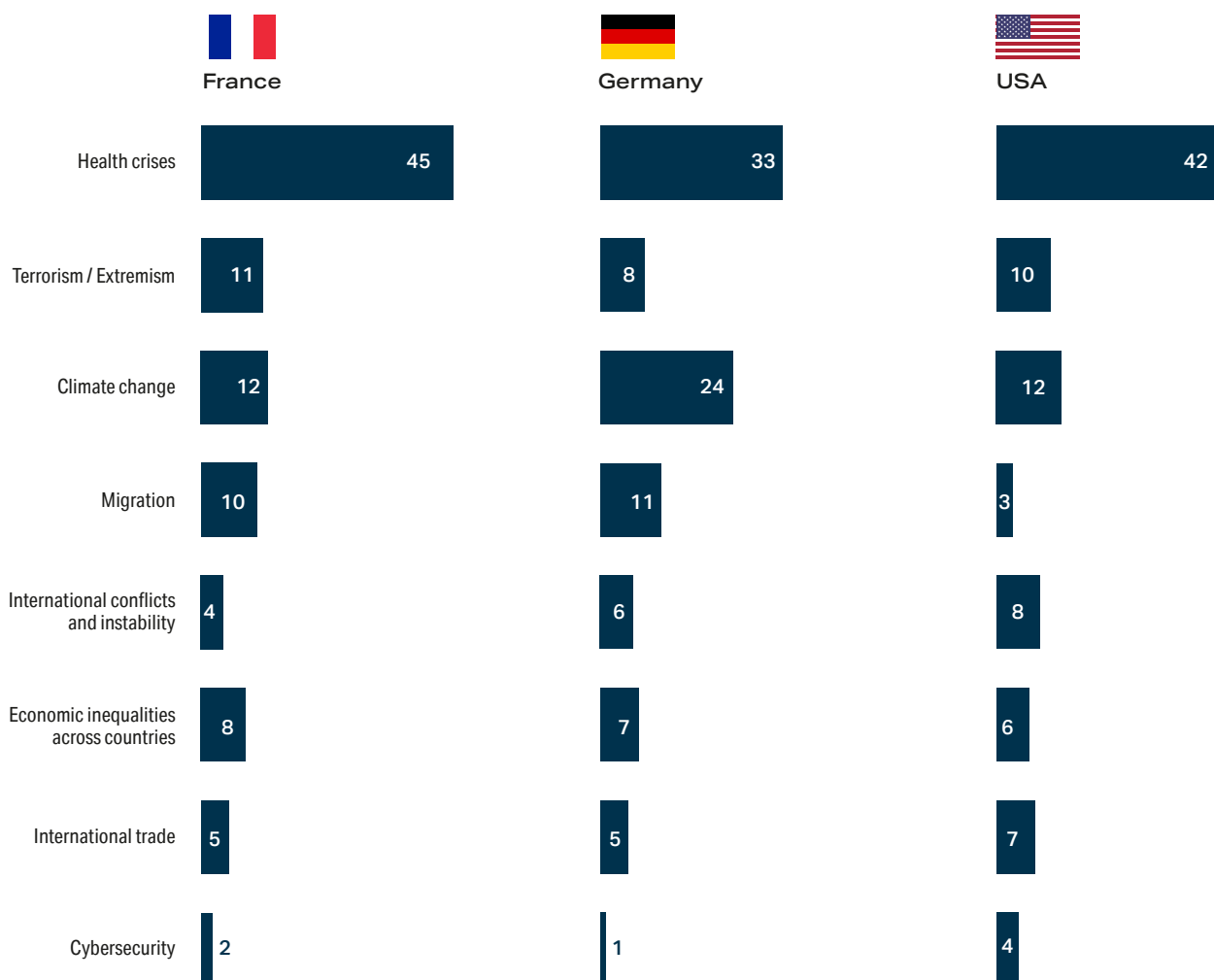
BEFORE COVID-19



In the second round of the survey, there is a shared consensus in Germany, France, and the United States that health crises are now the most important global challenge they face. This is especially true in France and the United States, where health crises top the rankings by a significant margin. Climate change comes second in all three countries, but now only 12% of French and American respondents rank it most important, a drop of 10+ points. In the midst of the coronavirus pandemic, 24% of Germans still believe that climate change is the biggest international issue. Only 10% of Americans and 11% of French currently believe that terrorism/extremism is the most important global challenge facing their country.

as illustrated by the 14-point difference between the two countries regarding terrorism and extremism observed in January. Similarly, though all three countries were in some form of coronavirus lockdown when surveyed in May, the pandemic had shifted priorities in Germany much less dramatically than in France and the United States.

The results of this question indicate that events have been experienced differently in each society. Although both France and Germany have been affected by terrorism in recent years, the impact on national debate has clearly been very different,



AFTER COVID-19

# How important is NATO in the security of your country?

More than two-thirds of Germans and Americans believe NATO plays an important role in the security of their country, while in France only half think it is important, and a quarter say NATO is unimportant for their security.

Despite President Trump's vocal criticism of the transatlantic alliance, 70% of American respondents consider NATO important for their security, including 43% who see it as "very important." Interestingly, this support is reflected rather evenly on both sides of the aisle: 72% of Republicans and 79% of Democrats think the transatlantic alliance is important for U.S. security. American respondents were least likely to consider NATO unimportant in ensuring their security (10%).

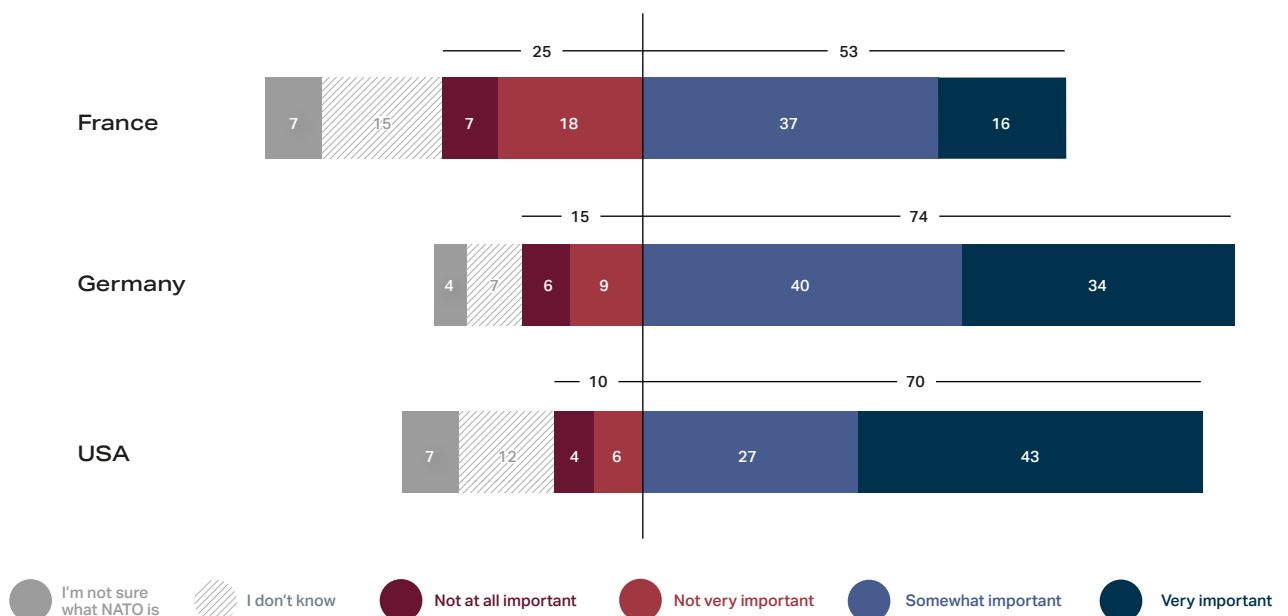
Nearly three quarters of Germans (74%) say that the alliance plays an important role in their country's security, with a third believing it to be "very important" (34%). There are some

variations along party and age lines: 85% of Greens see NATO as important compared to 61% of AfD respondents, and while 78% of Germans ages 45-54 think NATO is important, this falls to 69% among younger Germans (ages 18-24).

In France only a narrow majority of 53% of respondents consider the Alliance important for the security of their country, and only 16% see it as "very important." This is half as many as in Germany or the United States. Skepticism is spread almost equally across the French political spectrum: 29% of left-leaning French respondents, 27% of En Marche supporters, 27% of respondents from center-right parties, and 28% of National Rally respondents think NATO is not important for their security.

Interestingly, almost a quarter of French (22%) do not have an opinion about or do not know what NATO is (vs. 11% of Germans). The number of American respondents who also do not know what NATO is only a bit lower than in France (19%), despite it being a relatively high-profile topic for the Trump administration.

In your opinion, what is the importance of NATO's (the North Atlantic Treaty Organization's) role in the security of your country?



# How involved should the United States be in the defense and security of Europe?

A strong majority of Americans and Germans believe the United States should share responsibility for the security and defense of Europe, while the French are more skeptical and divided on the issue.

Overall support for U.S. involvement in European security and defense is the highest in the United States itself. Nearly two-thirds of Americans (65%) are in favor of U.S. involvement in European security and defense. That number is highest among older and well-educated Americans (74% of older respondent (55+) and 72% of highly educated respondents). Similar to the question of NATO's importance, this seems to be a rare issue of close partisan agreement: 72% of Democrats and 71% of Republicans believe the U.S. should be involved in European security.

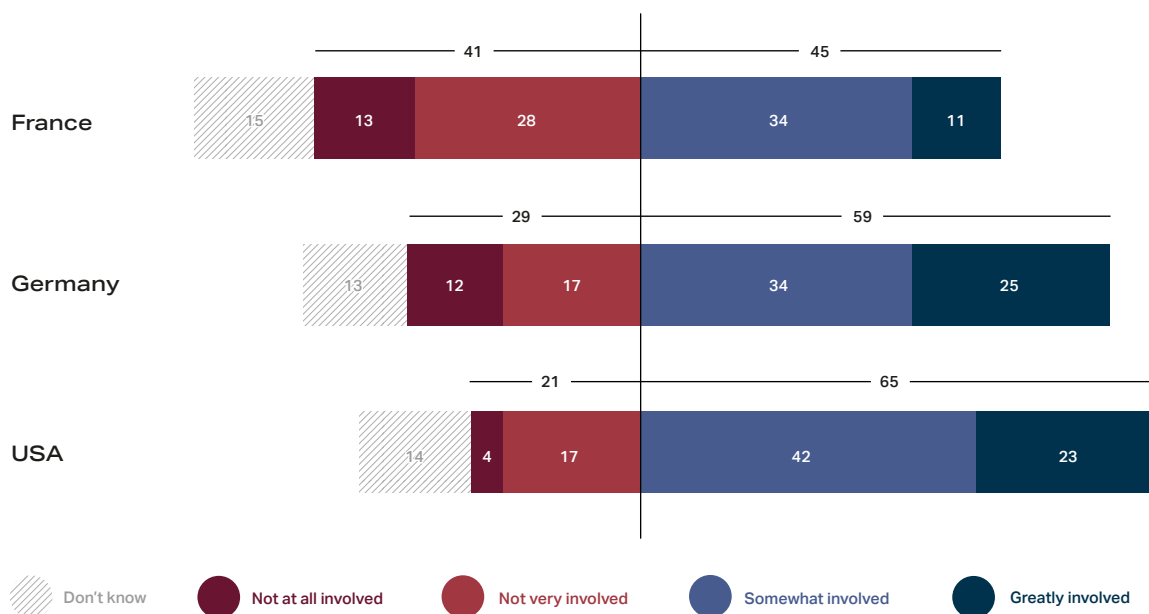
In Germany, a strong majority favor U.S. involvement (59%), with variation along party lines. An overwhelming majority of

voters affiliated with the center-right parties are in favor of U.S. involvement (Liberals (FDP) at 78% and the CDU/CSU at 73%). A smaller, but still clear majority of voters from the center-left parties also support a U.S. role in Europe (Greens 60%, Social Democrats 59%). Respondents from the Left Party (Die Linke) are divided, with 42% in favor and 44% against U.S. involvement. The far-right AfD is not as opposed to U.S. involvement as one might suspect, with 57% indicating support for a U.S. role.

The French are more skeptical toward U.S. involvement in the security and defense of Europe. While a plurality of 45% expressed support for U.S. involvement in the defense and security of Europe, almost as many (41%) think the U.S. should not play a role, in contrast to only 29% of Germans and 21% of Americans against involvement. Similarly, only 11% of French believe the U.S. should be greatly involved—a 14-point difference from responses in Germany (25%).

The contrast between French and German responses is consistent with France's historical ambivalence toward U.S. involvement in European security and the longstanding idea that Europeans should increase their independence. At the same time, the high levels of support for a U.S. role in European security among Americans suggest that some long-lasting values are resistant to political shifts, indicating a robustness—still—in transatlantic cooperation on security and defense.

How much do you think the United States should be involved in the defense and security of Europe?



# Do you think that your government should change how much it spends on defense?

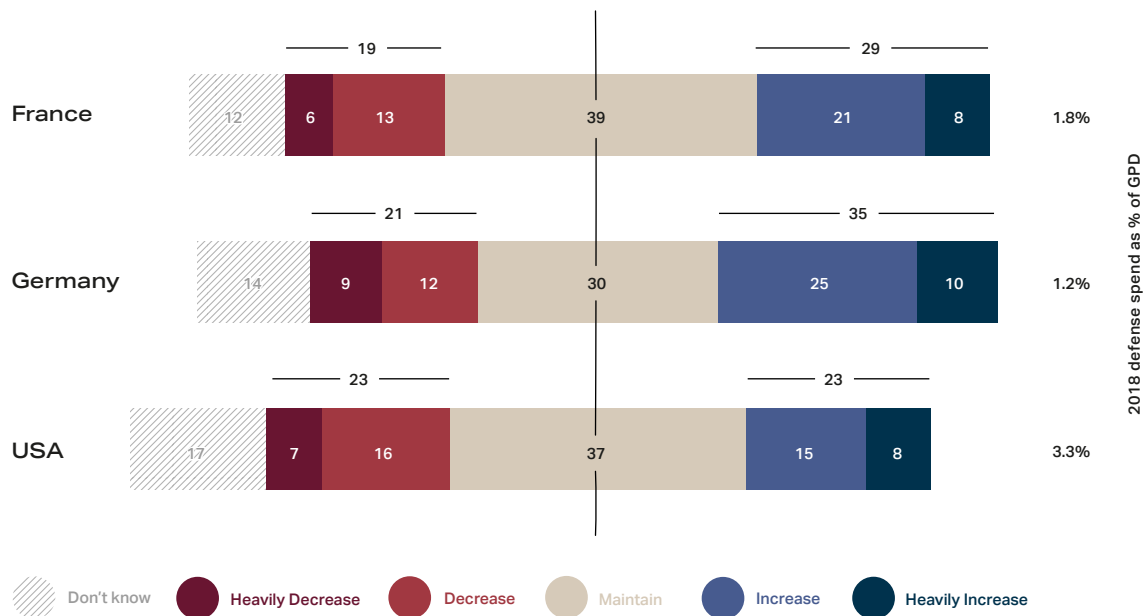
Support for increasing defense spending is inversely correlated with current spending, with support for a spending hike highest in Germany. Americans are evenly split on whether to increase or decrease budgets.

Germans have been facing pressure to increase defense spending in recent years from both France and the United States, and in 2019 Berlin made new commitments to meet their NATO treaty obligations on spending. The debate may have had an effect because Germans are the most in favor of increasing military expenditures: with a plurality of 35% wanting to either increase (25%) or heavily increase (10%) defense spending (while 30% want to maintain current levels). In France and the United States a plurality in both favor maintaining current levels.

In all three countries, the responses follow expected partisan lines. In the United States, Republicans want to spend more on defense (35% favor an increase, 15% favor a decrease), while Democrats want to spend less (37% decrease, 19% increase). It is a similar picture in France and Germany, with right-wing parties tending to favor an increase in spending while left-wing parties support a decrease. In Germany the most hawkish are CDU/CSU (44% increase, 16% decrease), AfD (48% increase, 22% decrease), and FDP (51% increase, 21% decrease). Germany's left-wing Die Linke adherents are strongly against an increase in defense spending (44% against, 16% for higher spending). French right-wing voters are likewise in favor of higher spending on defense, though slightly less than their German counterparts: 42% support an increase and 16% favor a decrease. French left-wing voters prefer to maintain current defense spending levels (45%).

Interestingly, on a number of questions, including this one, respondents with no party affiliation tend not to have an opinion. Thirty-four percent of independent American voters do not know whether the United States should increase, decrease, or maintain its defense spending; in France and Germany 25% of the non-affiliated also had no opinion on military spending.

Do you think your country's government should change how much it spends on defense? My government should...



# Should your government increase or decrease its engagement with the following security issues?

More engagement with Iran is a priority in all three countries. In France there are signs of "war fatigue," while Germans and Americans express a somewhat stronger appetite for increasing international involvement.

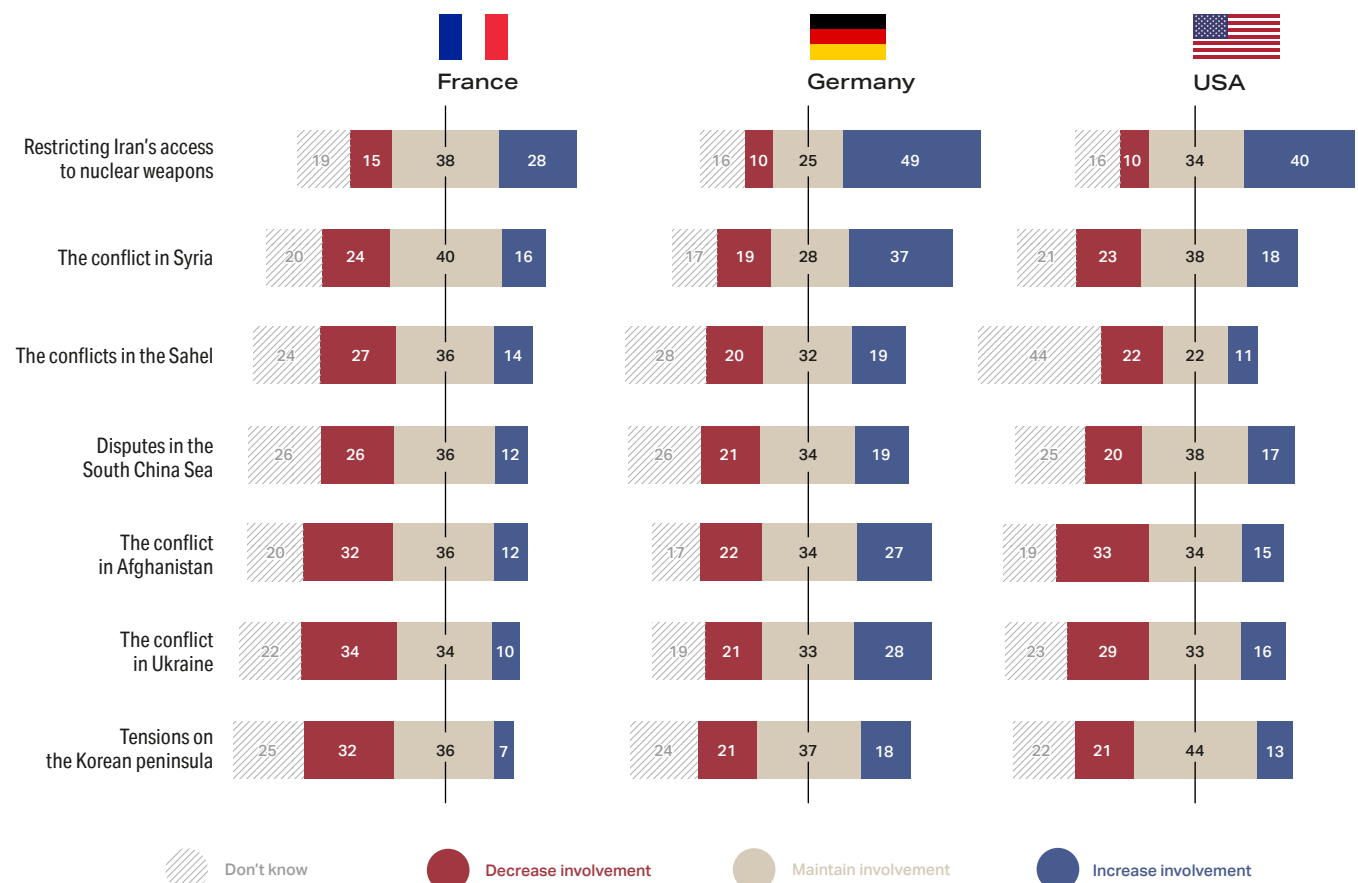
Almost across the board a quarter to a third of French respondents favor decreasing involvement in international security issues and almost a quarter do not have an opinion on the topic.

The exception is on the issues of restricting Iran's access to nuclear weapons, where 28% of French want more involvement (and 38% want to see current levels maintained). Relatively high levels of concern in all three countries for restricting Iran's access to nuclear weapons may be due to timing, as this question was asked right after Iranian General Suleimani was killed by an American drone and tensions were high. With the exception of Syria, the number of French who want to decrease involvement is double (or more) than of those who want to see more engagement, including roughly a third of French wanting less involvement in Afghanistan, Ukraine, and the Korean Peninsula. Members of the National Rally, like its far-right-wing cousin in Germany, AfD, consistently want to lower their country's involvement with these issues.

Germans are more willing to increase their role in international security issues. Iran stands out as the top security threat, with 49 percent of Germans saying they want Germany to get more involved (21 and 9 points higher than in France and the United States, respectively). This number is highest among the Greens, (62%) and CDU/CSU respondents (59%). A plurality of Germans



Do you think your country's government should increase or decrease its involvement in the following security issues?



(37%) also favor greater involvement in Syria. German respondents also show a much higher appetite for increased involvement in Afghanistan and Ukraine than the French or Americans.

We may be seeing in these responses a discrepancy in the understanding of the term "involvement" among the three countries. If the Americans and French understand involvement primarily as military action, the high support from Green respondents for involvement could suggest that with "involvement," Germans also have economic and developmental assistance in mind.

Only on Iran do a plurality of Americans want to see more engagement (40%). There is a notable fatigue for the conflict in Afghanistan, with 33% in favor of decreasing U.S. involvement there. The South China Sea and Korean peninsula security issues benefit from slightly stronger American support (38% and 44% respectively, for maintaining involvement). In Syria, a plurality of Americans (38%) want to maintain the current level of engagement, despite the administration's decision to drastically reduce the number of troops in the country. Republican respondents are more hawkish on Syria, with 67% in favor of either maintaining or increasing involvement.

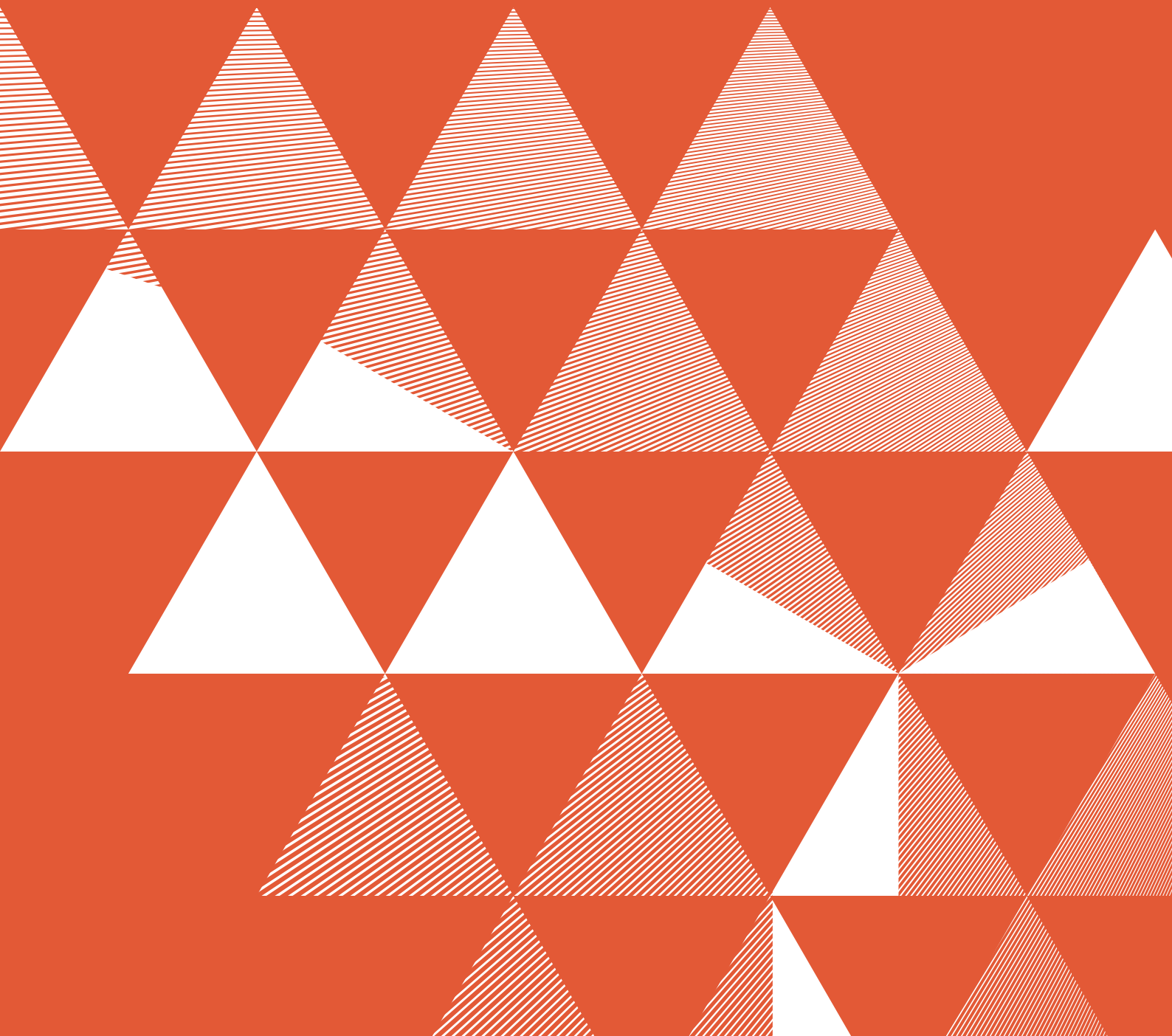
Notable with this question is a high percentage of respondents answering "don't know." This is in part not surprising since foreign policy is often not a particularly salient topic for most citizens. The very high number of Americans who do not know

what to do about engagement in the Sahel is likely due to the fact that it is not a commonly used term in the United States as well as due to the fact that U.S. engagement there is not high profile. France's engagement in the region, in contrast, is extensive, and yet a quarter of the public (24%) do not know whether their government should be doing more or less. Similarly, though France ended its combat mission in Afghanistan in 2012, 32% of the French want to see less engagement there.

# International trade

Three years of tariffs, trade conflicts, and anti-EU rhetoric from the White House are not reflected in Americans' view of the transatlantic economic partnership—in fact, in the wake of the pandemic, an increased number of Americans believe the relationship benefits them.

Not long ago a proposed transatlantic trade deal was riled in controversy. Yet clear majorities in all three countries support such a trade agreement, also after the pandemic.



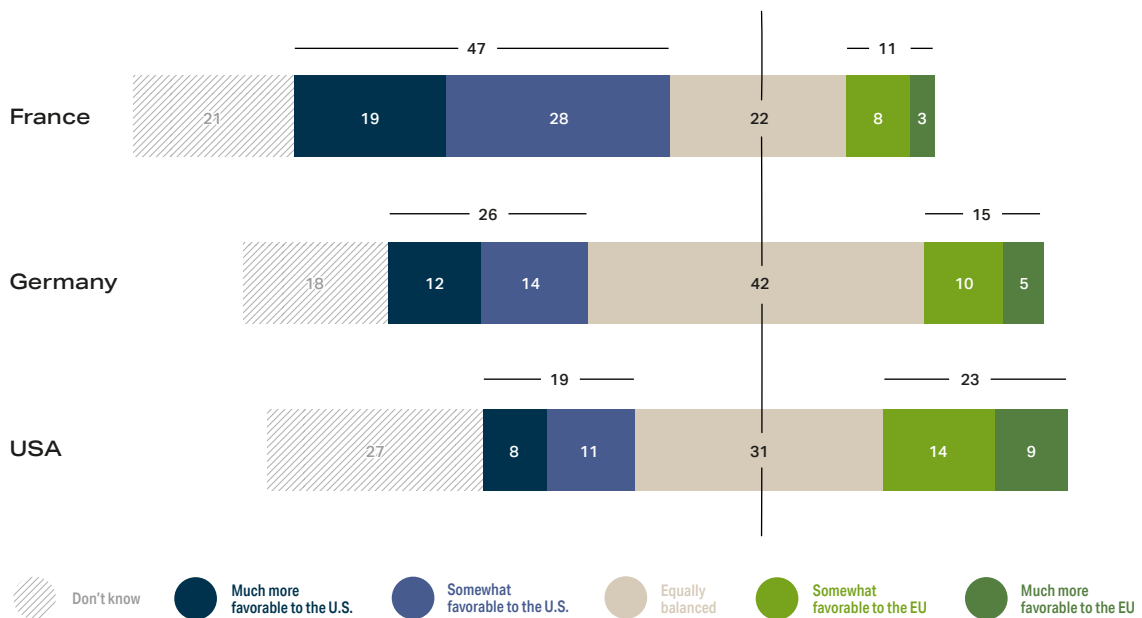
# How balanced is the economic relationship between the European Union and the United States?

Before the pandemic, a plurality of Americans and Germans found the economic relationship between the EU and the United States equally balanced, while almost half of French saw themselves disadvantaged. This holds largely true also after the coronavirus crisis.

Despite the impact of the pandemic on economies and global trade, opinions regarding the transatlantic economic relationship are largely unmoved. The Trump administration has argued that Europe takes advantage economically of the United States, but only a small minority of Americans agreed in January, and, interestingly, even fewer agree after the coronavirus outbreak.

A plurality of Americans (31%) found the relationship equally balanced. There was, however, a partisan divide—a small plurality of Republican respondents (29%) believed the EU-U.S. economic relationship benefited the EU more than the United States, while more Democrats (36%) and independents (34%) found it equally balanced. In Germany, a large plurality of respondents (42%) found the relationship equally balanced, while in France, nearly half of respondents (47%) found the relationship benefited the U.S. more. Generational divisions were striking in both the German and French cases. Older French respondents found the U.S. benefited more (69% of those ages 55+), while younger French respondents found the relationship equally

Do you feel the current economic relationship between the European Union and the U.S. is...



BEFORE COVID-19



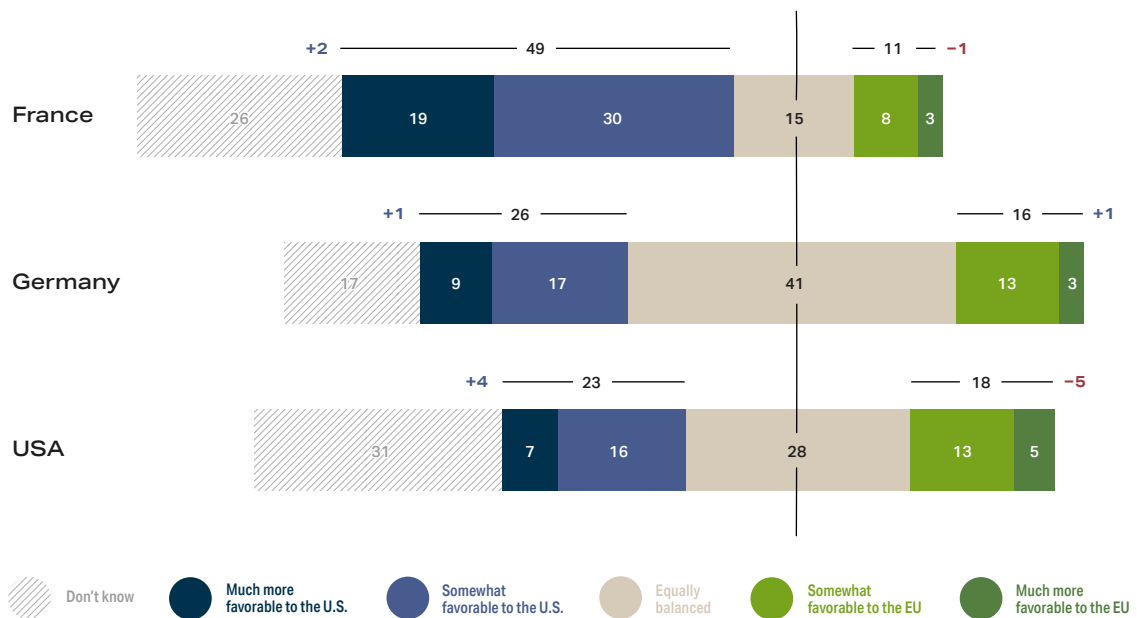
balanced (36% of those ages 25-34). In contrast to the French case, older Germans found the relationship equally balanced (49% of those ages 55+), while younger Germans believed the U.S. benefited more (37% of 18-24 year olds).

After the coronavirus crisis, the results across all three countries remain largely the same. Only in France do a plurality see themselves disadvantaged (up 2 points from January), though in all countries a slightly higher number see their economy disadvantaged than advantaged. In Germany and France, we see almost no shift from the coronavirus crisis. There is a small increase in the number of American respondents who believe the transatlantic economic relationship favors the U.S. (up from 19% to 23%).

We also see a notable partisan shift, with a plurality of Republicans now finding the relationship equally balanced (from 27% in January to 32% now), while a higher number of Democrats and independents believe the relationship favors the

United States (Democrats: up from 22% to 26%; independents: from 13% up to 20%). In both France and the United States it is respondents age 55 and older who perceive the relationship to be more beneficial to the other party.

Falling stocks, shrinking economies, and collapsing trade from the coronavirus crisis as well as trade disputes over medical equipment and vaccines seem not to have significantly soured views on the transatlantic economic partnership on either side of the Atlantic.



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# Do you support a trade agreement between the European Union and the United States?

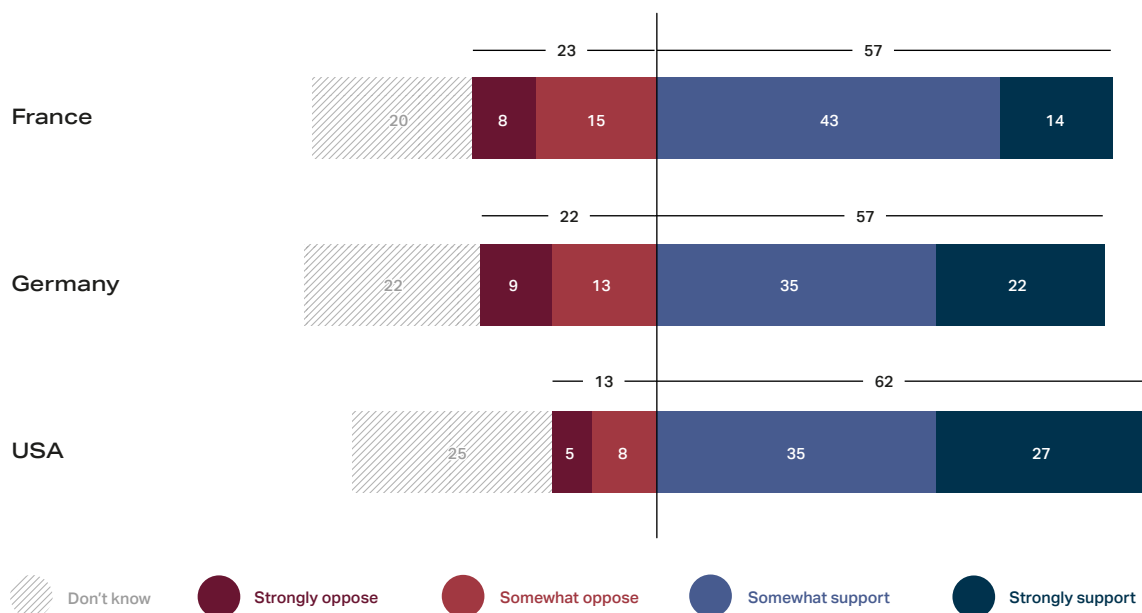
In January, respondents in all three countries supported a transatlantic trade agreement. In the midst of the pandemic, overall support for a trade agreement remains high across all countries, falling slightly in France.

Despite the failure of the Transatlantic Trade and Investment Partnership (TTIP) and three years of trade disputes between the EU and United States, support for a transatlantic trade

deal was high in January. Following the coronavirus outbreak, despite disrupted supply-chains and large economic downturns looming, opinions on transatlantic trade do not appear to have significantly changed.

The initial results in January showed that despite recent years of strained economic relations, there is still public support for a transatlantic trade agreement, in fact a majority in all three countries are for it. In France and Germany, 57% support it. In the United States, where support for such a deal has traditionally been the highest, support was at 62%. The majority of all age groups across each country supported a trade deal, with the strongest support from older respondents (65% of French and German and 75% of American age 55 and older). Despite partisan divides on many issues in the United States, a strong majority of Republicans, Democrats, and independents favored an agreement (64% of Republicans, 65% of Democrats and

To what extent do you support or oppose a trade agreement between the European Union and the United States?



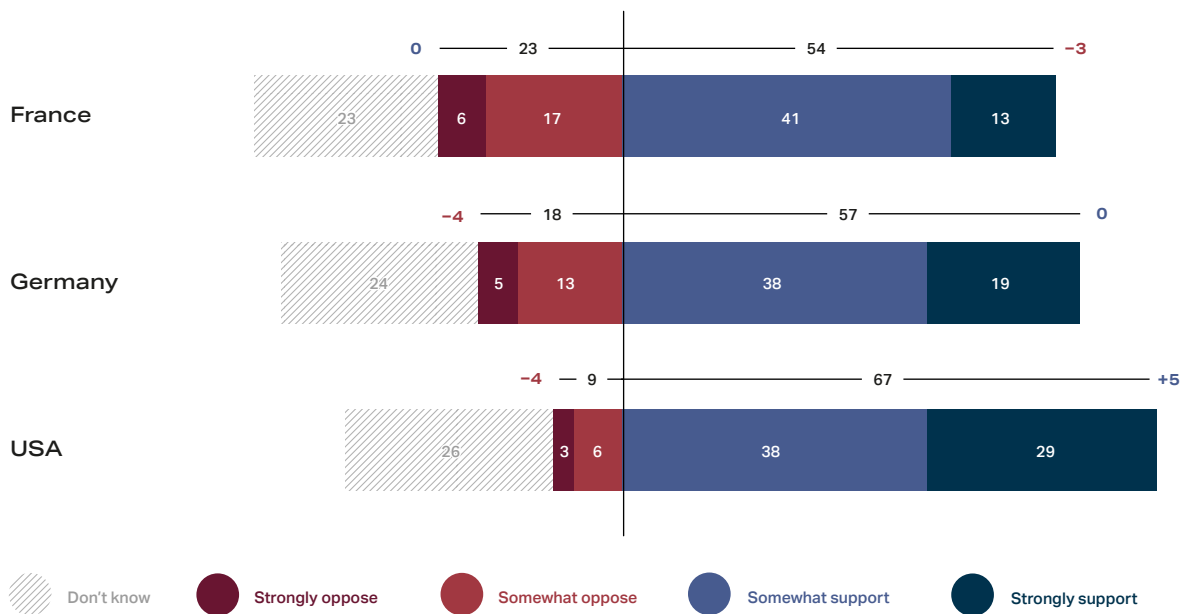
BEFORE COVID-19

independents). An EU-U.S. trade deal enjoyed large support across the German and French political spectrums; the lowest support came from Germany's left-wing Die Linke (47%).

In the wake of the coronavirus crisis, opinions about transatlantic trade have not changed significantly. A nearly unchanged majority of respondents still support a trade agreement (57% in Germany, 67% in the United States, 54% in France), with slightly less support in France and more in both the United States and Germany. Support for an agreement remains high across all age groups in all countries.

In Germany, support among older respondents (age 55 and older) has increased by five percentage points (from 65% to 70%), while in France, support among the same age group has decreased by nine points (down to 56%). Support in the United States among the same age group remains very strong (75% somewhat or strongly support).

There have been some small but significant shifts among politically affiliated respondents: support for an agreement has increased among both Republicans and Democrats in the U.S. (Republicans: up 5 points to 69%; Democrats: up 7 points to 72%). In Germany, support has increased slightly (2 points), and now even a majority of respondents from Germany's left-wing Die Linke support a trade deal (from 47% in January to 59%).



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# Relations with China

Washington and the EU have taken a tougher tone toward China in recent years, and public opinion has followed, especially after the coronavirus crisis. Most Americans, French, and Germans now view China's rising influence negatively.

Chinese suppliers' role in Europe's digital infrastructure has been a source of transatlantic tension, but on this issue transatlantic publics are more aligned than their governments—all are in favor of getting tougher with China.

# How do you feel about China's rising influence in global affairs?

In the January survey, nearly half of respondents in each country characterized China's rising influence as negative. In the wake of the pandemic, negative views of China's rising influence have increased by 10 percentage points or more across all three countries.

Only about a year ago, China was designated a "systemic rival" to the EU after 15 years of "strategic partnership," and the U.S.-EU dialogue on China continues to be strengthened. It seems the conflicts with China and tensions between transatlantic partners regarding China in the areas of trade and technology have

made their way into the public consciousness. About half of American, German, and French respondents found China's rising influence to be a negative development (48% in France, 50% in Germany, 46% in the United States). A bit more than a quarter of respondents viewed Beijing's growing clout positively (27-31%), while a quarter of respondents, (22-25%) could not say if this development was positive or negative.

In all three countries, there was a generational divide on the issue. Young respondents (ages 25-34) were more open to Chinese influence, with 40% in France and the United States and 36% in Germany saying they felt positive or very positive about China's rise. In contrast, the majority of respondents age 55 and older in all three countries viewed China's rising influence negatively (58% in France, 60% in Germany, 65% in the United States). In Germany, a negative view of China's rise carried across most parties, with Green and Christian Democrat-aligned respondents having the highest negatives (61% of CDU/CSU and 65% of Greens). In France, positive views were highest

How do you feel about China's rising influence in global affairs?



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among the conservative-liberal Republicans (44% percent), and in the United States, a slim majority of Republicans and independents viewed China's growing influence negatively, 51% versus only 44% of Democrats.

Four months later, after the coronavirus had put Europe and the United States in lockdown, negative views of China's rising influence have increased significantly, by double digits.

Now a clear majority in all three countries have an adverse view of China's ascent: in France, negative views are up 10 points to 58%; in Germany up 10 points to 61%; and in the United States up 11 points to 57%. The fall in total positive views are down by slightly smaller margins (-9 points in the United States, -8 in Germany, and -6 in France). Additionally, fewer respondents are unsure in May whether China's influence is positive or negative (down by 4 points in France but only 2 in the United States).

In all three countries, fewer young respondents still find China's rising influence to be a positive development (among ages 25

to 34 in France -6 points to 34%; in Germany -15 points to 21%; and in the U.S. -12 points to 28%). Negative views among older respondents (55+) across each country have also climbed (by 12 points in France to 70%; by 7 points in Germany to 67%, and by 13 points in the United States to reach 78%). The rise in negative views of China's influence runs across the political spectrum of all countries, with the highest percentage of negative views among U.S. Republicans (66%).



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# Should your country take a tougher or softer approach to China?

French respondents were most likely to want a tougher approach to China. Americans were least likely to favor getting stricter, but this might be because Washington has already confronted China more than its European allies, especially in the areas of trade and security.

On the subject of cybersecurity, respondents from all three countries are closely aligned, with about half of French (53%), Germans (52%), and Americans (50%) in favor of a tougher approach. Few respondents (less than 10% across the board) want a more indulgent stance toward China on any issue. At the same time, many French, Germans, and Americans are uncertain about the appropriate approach for their respective country to take. Between 15 and 26 percent of respondents said they did not know what their country should do.

Despite an ongoing multi-year trade war between the United States and China, only a small minority of American respondents (9%) reported wanting the United States to be “less tough”

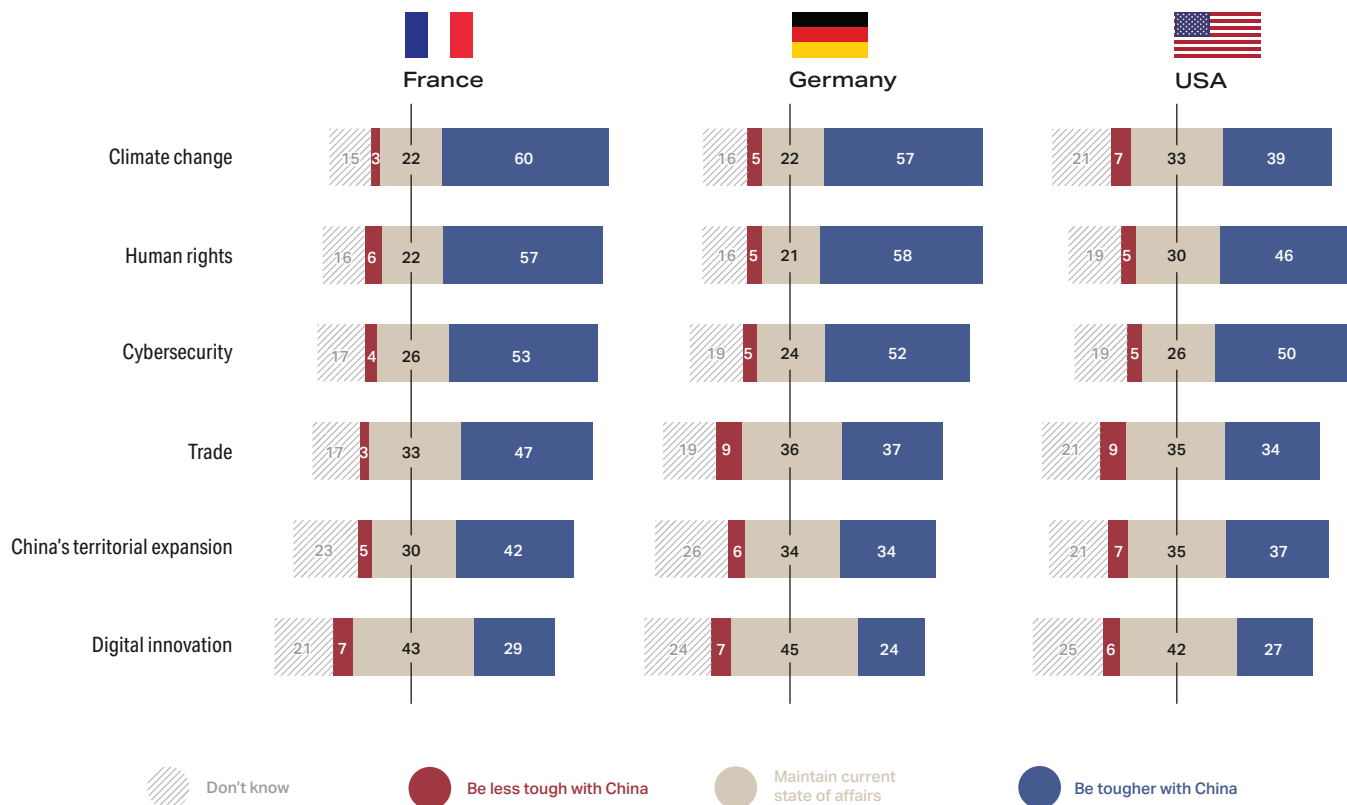
toward China on trade. Most advocated maintaining the current policies (35%) or getting tougher (34%). German views on trade with China were nearly identical to Americans', with an even split between maintaining current policy (36%) and adopting a stricter approach (36%), and were similarly split on China's territorial expansion.

In all three countries, there is majority (50-53%) support for tougher approaches to China on cybersecurity, but in France and Germany respondents think their governments' need to be more demanding with Beijing especially on climate change and human rights (57-60% want a tougher approach). In contrast, among Americans, only slightly more preferred a tougher approach to the status quo on climate change (39% tougher, 33% maintain) and only 46% think a tougher approach on human rights is necessary (46% tougher, 30% maintain).

With the exception of digital innovation, French respondents support a more unflinching approach to China across the board. Germans are content with the status quo in the digital sphere and divided on trade, but want a tougher approach to Beijing in the areas of human rights, climate change, and cybersecurity.

Recent years of tension between the U.S. and China, especially in the areas of trade, digital innovation, and security in China's neighborhood, may have left Americans thinking the current line is tough enough.

How do you think if your country should approach China regarding the following issues?





# Digital trends

The digital economy has been a source of tension for transatlantic partners, as Europeans have sought to regulate and tax American tech giants and Washington has called foul. But public opinion is aligned; even Americans think tech giants should pay more.

Americans are more worried than the French and Germans about digital challenges from privacy to cyberattacks and fake news.



# What do you think of the tax rate paid in your country by large U.S. technology companies?

A plurality of respondents from all three countries supports increasing taxes on big American technology companies, with the highest support in France.

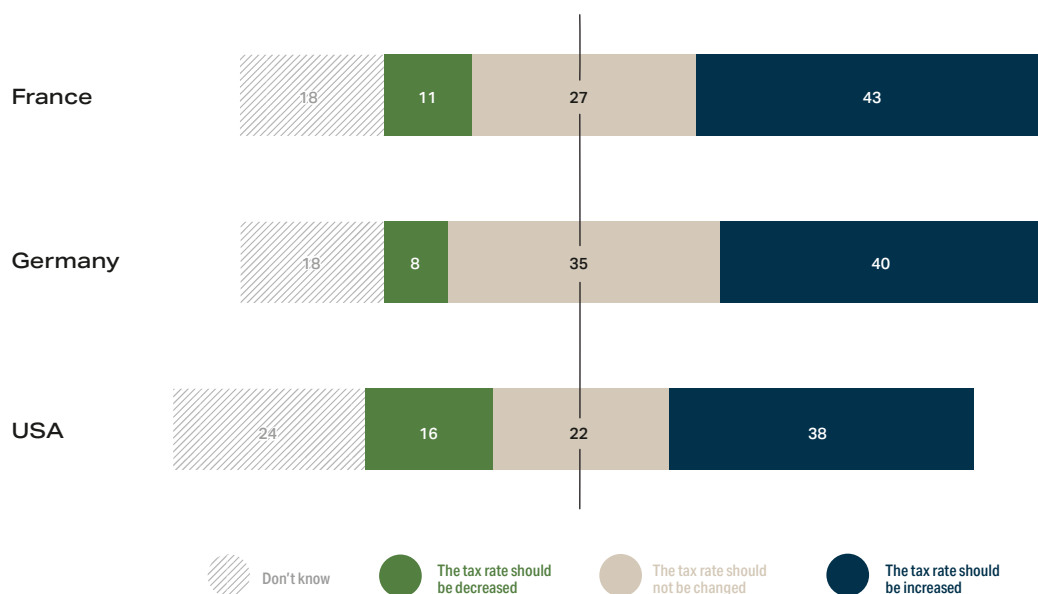
A large part of respondents from all three countries support increasing taxes on big American technology companies. While the tendency is a bit higher in France than in Germany or the United States, the figures are (perhaps surprisingly) similar, with a plurality of 38% to 43% in all countries in favor.

Though more French support higher taxes, they appear less concerned by this issue than their president, who has been very vocal on the subject and supported a law passed in 2019 to tax large technology companies (43% want to see higher taxes, while 39% think current levels should be maintained or even lowered, and 18% do not know). In Germany and France, support for higher tech tax rates tends to increase with age, with 60% of French and 59% of Germans age 55 and older wanting tech companies to pay more taxes.

The support for raising tax rates on big American technology companies is lowest in the United States, where support for lower taxes is also highest (at 16% double the German proportion). There are notable and predictable partisan divides, with half (50%) of Democrats in favor of higher taxes compared to only 30% of Republican respondents. But it seems not to be a salient issue, as almost a quarter of Americans did not know what they thought.

The June 2020 U.S. withdrawal from OECD negotiations on digital taxation threatens to reignite trade disputes within the transatlantic community.

What do you think of the tax rate that is paid in your country by large U.S. technology companies?



# How do you feel about the following digital challenges?

The vast majority of respondents from all three countries express concern about digital issues, from the spread of fake news, to cyberattacks, and data protection. Across the board, Americans are the most worried.

The top concern of Americans and French is the protection of personal data (86% and 82%, respectively, are very or somewhat concerned). In the United States respondents are nearly equally worried about cyberattacks on critical infrastructure (83%) and the spread of fake news and political manipulation (82%). In Germany, respondents are most worried about cyberattacks on critical infrastructure (77%), with worries about fake news closely behind (75%).

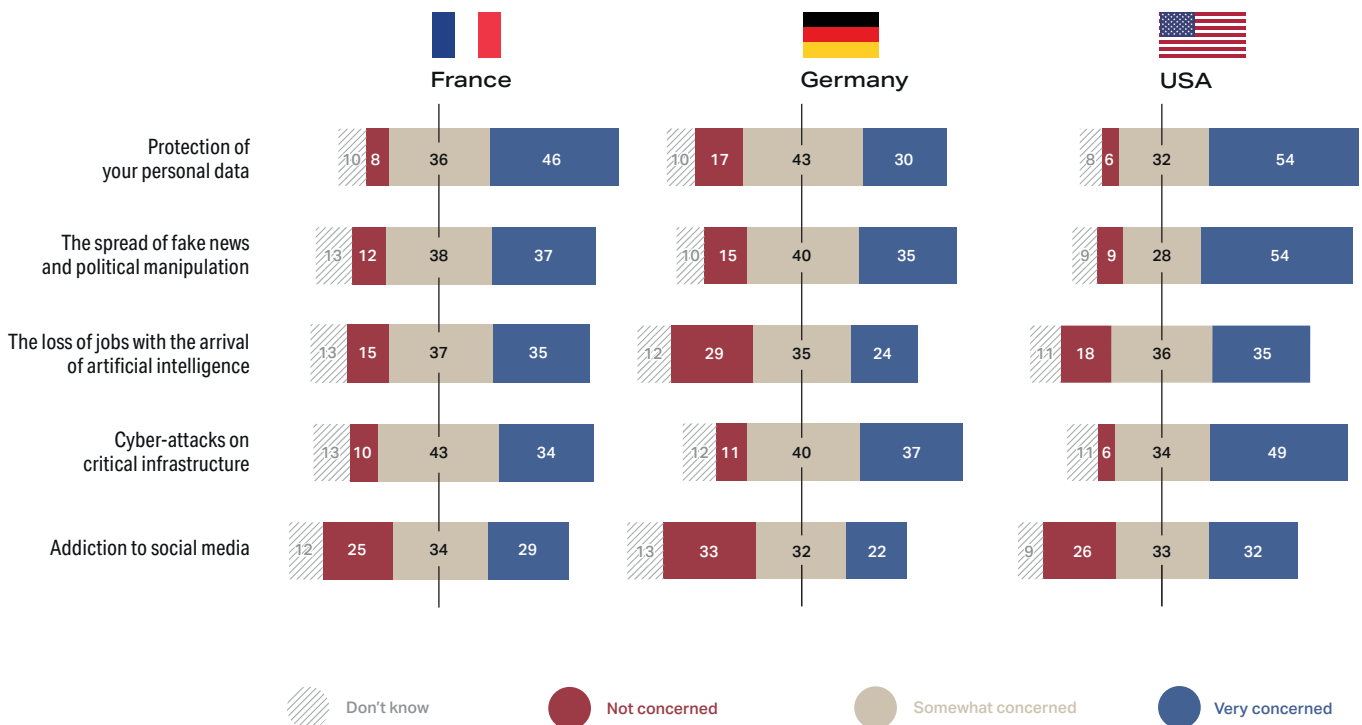
French and American respondents expressed deep concern about job loss due to the arrival of artificial intelligence (AI), with 72% of French and 71% of Americans describing themselves as very or somewhat concerned. In contrast, Germans, with their relatively strong economy and low unemployment before the

coronavirus pandemic, are less worried: only 59% of Germans are concerned and a full 29% reported that they were not concerned about job loss.

There were significant generational differences in attitudes toward digital issues. Interestingly, it is not the youngest respondents who are most relaxed about the digital world, but those ages 35 to 44. This cohort in all three countries expressed less concern about digital issues than older respondents (who entered the digital age as adults) and younger respondents (digital natives). In the United States, only 36% of respondents ages 35 to 44 years old described themselves as “very concerned” about cyberattacks, compared to 45% of those ages 18 to 24, and 65% of those age 55 and older. Likewise, the 35-44-year-old cohort were less concerned about personal data protection, fake news, and social media addiction.

Despite the European General Data Protection Regulation (GDPR), respondents in France and Germany diverge on concerns over the protection of personal data. While in France, the vast majority of respondents are concerned about personal data protection, in Germany, a country with a well-known stance on digital privacy, respondents are less worried, perhaps more confident that their personal data is safe.

How do you feel about the following digital challenges?



# Is your country doing enough to help citizens adapt to the impact of digital technologies in the workplace?

Prior to the coronavirus crisis, respondents in all three countries were divided on whether their governments were taking somewhat adequate and somewhat inadequate measures. After the crisis, French and American respondents are more satisfied, Germans less.

It is interesting to note that while the crisis has had a positive impact on American and French perceptions of their respective governments' measures to help citizens adapt to the impact of digital technologies in the workplace, it had the opposite effect on Germans, who were already the most critical.

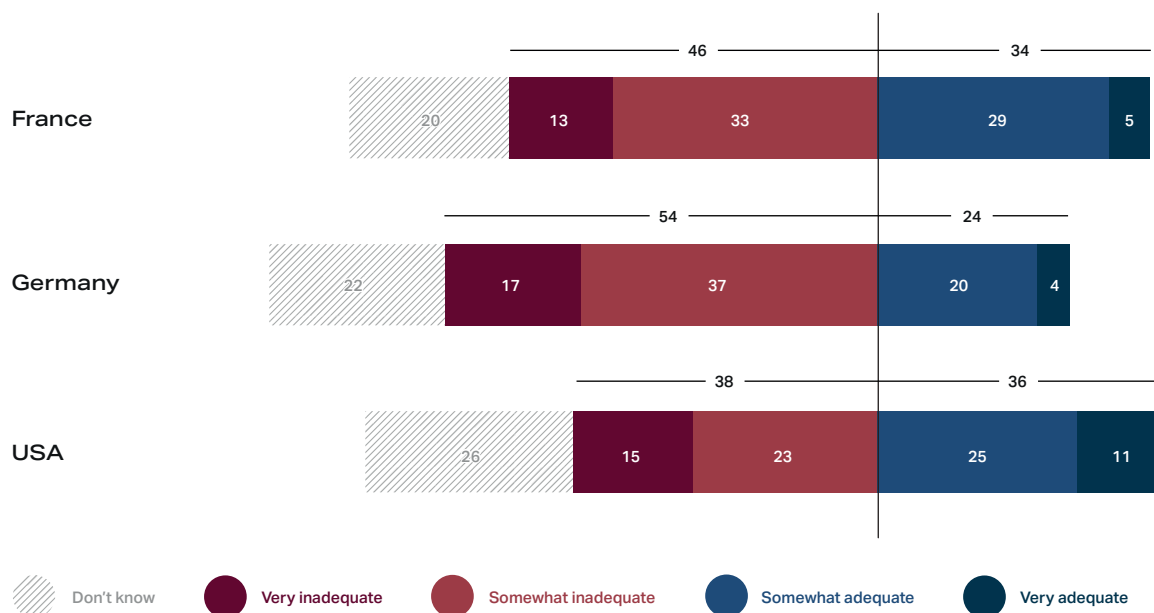
Before the pandemic, respondents in all three countries shared the feeling that their government's actions were generally inadequate, with the highest level of dissatisfaction in Germany (54%), followed by France (46%), and the United States (38%).

The split between positive and negative views was highest in Germany (54% inadequate to 24% adequate) and lowest in the United States (38% inadequate, 36% adequate). Twenty to twenty-six percent of respondents in all three countries did not know how to judge their government's response.

In the second wave of the survey, with life suddenly much more digital as many worked from home, French and Americans found their government's actions more adequate than four months earlier (in France up 7 points to 41% and in the United States up 5 points to 41%). In contrast, slightly more Germans were dissatisfied: 54% pre-crisis vs. 58%.

There are generational differences that carry through the three countries. Young people (ages 18-24) are more likely to find that their governments are taking adequate measures (50% of French, 29% of German and 47% of Americans). Supporters of the governing parties also tend to have a more positive

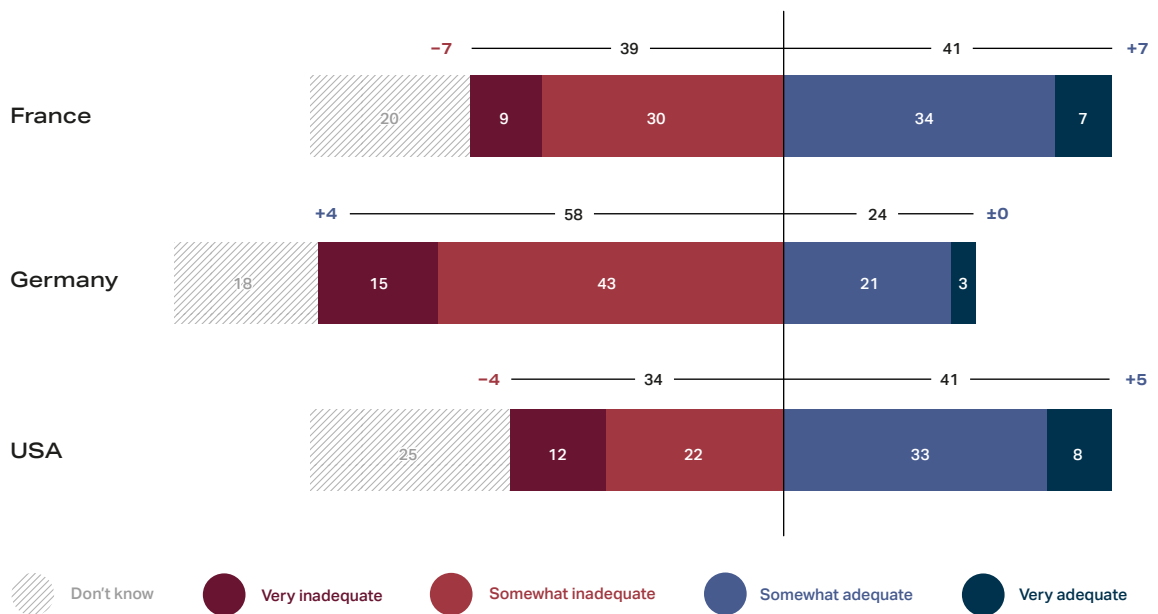
How adequate are the measures your country's government has taken to help citizens adapt to the impact of digital technologies in the workplace?



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perception of how their government (and thus their party) is responding: 61% of President Macron's of En Marche party in France, 33% of Christian Democrat supporters in Germany, and 56% of Republicans in the United States find their government is preparing citizens for the tech revolution.

The coronavirus crisis has had an impact on citizens' perceptions of government measures on technology in the workplace. This impact has been generally positive in France and the United States, and slightly negative in Germany. Despite being the economic powerhouse of Europe, for years, Germany has struggled to compete in the global technology race—the pandemic appears to have revealed further shortcomings in this regard. In France and in the U.S., lockdown measures have forced a large number of citizens to work from home, with an increased use of digital technologies. This experience may have revealed to the French the usefulness of President Macron's 2017 ordinances, which introduced and set a framework for teleworking in law.



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# Who should be responsible for regulating content on social media?

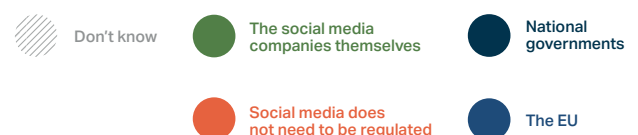
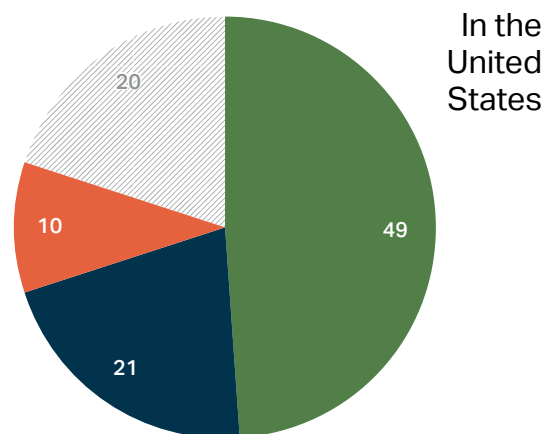
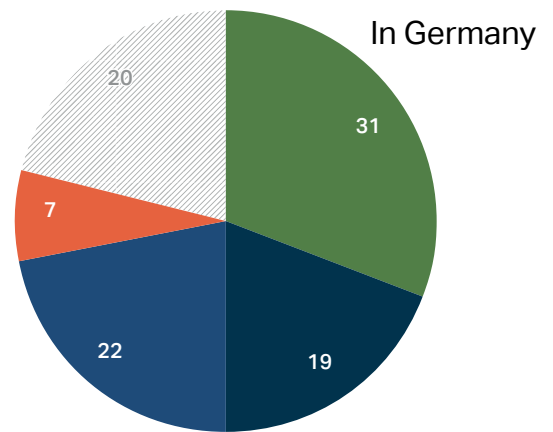
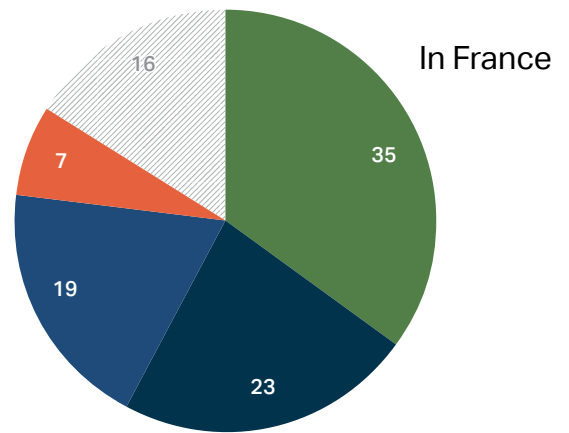
A super majority think that content on social media should be regulated. Respondents supported social media companies regulating themselves, especially Americans, while French and Germans also voiced almost equal support for a government or EU role.

The vast majority of survey respondents in all three countries believe that social media should be regulated in some way (76% in France, 72% in Germany, 70% in the United States). A plurality of respondents in all three countries support social media companies regulating themselves (35% in France, 31% in Germany, 49% in United States). However, support for a national government role in regulation was also significant (23% in France, 19% in Germany, 21% in the U.S.). French and German respondents were split on whether regulation should happen at the national or EU level, with Germans showing a slight preference for an EU role (22% EU vs. 19% national) and French for a national approach (23% national vs. 19% EU).

Americans were divided along party lines, but in the reverse of their traditional positions on government regulation. More Republicans (27%) favored national government regulation than Democrats (20%) or independents (19%). Although this would seem surprising, as Republicans are thought of as the pro-business party of low regulation and limited government, conservatives, and especially the current Republican administration have complained of liberal bias in social media companies. In May 2020, Twitter flagged a series of tweets from President Trump for containing manipulated media, as part of the platform's new efforts to combat misinformation.

Interestingly, though in a different question in this survey Americans expressed more concern than their European counterparts for the spread of fake news (54% very concerned, compared to 27% and 35% of French and Germans), slightly more Americans think social media content does not need to be regulated (10% vs. 7% in France and Germany). This is in keeping with American disinclination for government regulation of speech while in both France and Germany support for government oversight and speech restrictions is generally higher, and they have already in place comprehensive government regulations on social media content.

Who do you think should be responsible for regulating the content on social media?



Sample: France 1004; Germany 1001; USA 1001. Expressed in % rounded up to the next unit for decimals .5 and higher. EU response n/a for American respondents.

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