

TO: National Foreign Trade Council
FR: Morning Consult
DT: July 2024
RE: 2024 Survey Results

Prepared for National Foreign Trade Council



On behalf of the National Foreign Trade Council, Morning Consult conducted a nationwide survey of 2,001 registered voters to understand perceptions of the United States' (U.S.) standing in the world as a leader in economic and foreign policy. The survey also evaluated views on digital trade and concerns regarding actions taken by foreign regulators against U.S. companies abroad.

United States Global Leadership

Policies around human rights and a strong national defense are important, but concerns over waning leadership are present.

- Two-in-three (66%) voters view economic engagement with other countries as good because it creates new markets and growth rather than view economic engagement as bad because it lowers wages and costs jobs (35%).
- Further, voters' view economic engagement with other countries as having a positive impact on U.S. innovation and technology (65%) and the U.S.'s standing in the world economy (62%).
- When it comes to economic engagement and U.S. global leadership, two-in-three voters view protecting human rights (66%) and a strong national defense (65%) as *very important* when it comes to policies that the United States should promote – 87% view each as *important* policies. Similarly, a majority of voters say it is *very important* that the United States promote innovation and technology leadership (58%).
- When it comes to policies that the United States can promote, voters make it clear that they want the United States to have a leadership role in writing the global rules for technology (58% very important | 86% important) and trade (54% very important | 85% important).
- Voters express clearly that it is important for the United States be global leaders, but a strong majority of voters agree that the United States has taken a significant step back in its global leadership in key areas like international economic and technology policy (77% agree). There is agreement across the aisle as well, with both Democrats (76%) and Republicans (83%) in agreement that the United States has taken a step back in global leadership.
- As voters view the United States as have taken a step back in global leadership, voters are concerned (79%) this benefits China, especially when it comes to the United States defending the interests of U.S. companies abroad. Concern of China benefiting is true for both Democrats (76%) and Republicans (85%) as well.



U.S. Companies and Foreign Regulators

Voters have not heard much about foreign regulators targeting U.S. companies, but voters are concerned about these regulations and believe they should not target U.S. companies to the advantage of their own domestic competitors.

- Just 7% of voters have heard a *lot* about European authorities targeting U.S. companies with regulations.
- Among those who say that they have heard at least something about European authorities targeting U.S. companies with regulations, four-in-five (82%) are concerned that these regulations are discriminating against U.S. companies to protect their markets from foreign competitors.
- Regardless of how familiar they may or may not be with the issue, three-in-four (74%) voters indicate that foreign regulators, like from the European Union, should not target U.S. companies while advantaging their own domestic competitors. Importantly, both Democrats (73%) and Republicans (78%) agree as well.
- If countries continue to target U.S. companies with discriminatory regulations, three-in-four voters support engaging in negotiations to resolve the regulations (77%) or working with allied countries to apply pressure on the country imposing the regulation

Digital Trade and Technology Innovation

Voters are supportive of a digital trade agenda that helps services created by American workers and aids small businesses access new markets.

- After a brief definition of digital trade*, at least four-in-five voters agree that it is important for the United States to develop a digital trade agenda that helps services created by American workers enter and effectively compete in overseas markets (83%), helps small businesses access new markets and grow their business (83%), and ensures American-led digital innovation on new technology, like artificial intelligence (79%).
- Not only do voters view it as important that the United States be global leaders in digital innovation, but they also agree that the U.S. government should incentivize American-led technology innovation (76%).
- China remains a concern for voters, especially with technology innovation, where seven-in-ten (71%) voters in agreement that the U.S. is falling behind China when it comes to technology innovation.

This poll was conducted between July 11-July 13, 2024 among a sample of 2,001 Registered Voters. The interviews were conducted online and the data was weighted to approximate a target sample of registered voters based on gender by age, educational attainment, race, marital status, home ownership, race by educational attainment, 2020 presidential vote, and region.

**As you may know, digital trade is commerce that uses electronic technologies to facilitate the exchange of goods and services, as well as the transmission of data and information across border. Examples of digital trade are the cross-border sales of a book online or using online banking or streaming services for a foreign transaction.*