



CUSEF RESEARCH REPORT

U.S. General Population Survey
Washington Experts Survey

Prime Group
2019

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EXECUTIVE SUMMARY



General Population

Key Findings 1 of 3

- Despite all of the developments in and news surrounding U.S.-China relations, Americans' opinion of China has remained stable (21% favorable). However, of the seven countries tested only Russia and North Korea had lower favorable ratings.
- President Xi is viewed favorably by just 12% of Americans, the same rating given to President Putin. However, 58% view Putin unfavorably while just 39% view Xi unfavorably. Half of Americans are either neutral or unable to rate Xi.
- Pluralities of Americans view China as having a strong military (49%), being aggressive (46%), and being innovative (45%). Just one-in-five see China as peaceful (19%) or a friend of the U.S. (19%).
- Just 15% of Americans say China can be trusted in their dealings with the U.S., essentially unchanged since 2015. Two-in-five (41%) say China cannot be trusted. The rest are neutral or unsure.
- Fifteen percent of Americans rate the relationship between the U.S. and China positively while 35% rate it negatively; 29% expect that relationship to improve over the next ten years while 25% think it will worsen.
- Of ten issues concerning China Americans are most familiar with trade friction with the U.S. (57%), pollution in China (49%), Internet censorship (47%), and cybersecurity disputes with the U.S. (44%).



General Population

Key Findings 2 of 3

- Of the ten issues tested Americans are most concerned with trade friction with the U.S. (53% list it as one of their top three concerns), cybersecurity disputes with the U.S. (41%) and environmental pollution in China (34%).
- Americans hold the U.S. and China about equally responsible for current trade tensions with 23% blaming China, 21% blaming the U.S. and 39% blaming both equally.
- Half of Americans (51%) believe that trade friction between the U.S. and China is having a negative impact on the global economy.
- Most Americans believe that the U.S. and China will benefit equally from increased trade (37%) or are unsure who will benefit more (23%).
- One-third of Americans (36%) think the U.S. should engage and cooperate with China while 29% think the U.S. should try to limit China's global influence and 35% are not sure.
- Half of Americans (50%) think the recent imposition of tariffs between the two countries is having a negative effect on the trading relationship.
- One-third of Americans (34%) believe that U.S.-China educational and technological cooperation should be increased (22%) or maintained at current levels (12%) while 29% think it should be reduced. The rest are unsure.

General Population

Key Findings 3 of 3

- More Americans (44%) disapprove of President Trump's handling of relations with China than approve (37%).
- More Americans (29%) think China's economic growth is good for the U.S. than think it is harmful (19%) while half take a neutral position.
- Americans are divided on whether U.S. and China interests will lead to cooperation (39%) or to conflict (32%) with 29% unsure. This has not changed since 2015.
- The strongest messages in support of U.S.-China cooperation are:
 - The countries have common interests like climate change and anti-terrorism;
 - The countries have more to gain from cooperation than from conflict;
 - Cooperation will make it less likely that the countries will be drawn into armed conflict.
- Americans identify the most positive actions China has taken or could take as;
 - Helping to block expansion of North Korea's nuclear program;
 - Lifting millions of Chinese out of poverty and creating a powerful consumer market;
 - Investing in science and technology leading to important breakthroughs.

Washington Experts

Key Findings 1 of 3

- Just 9% of these Experts have a favorable opinion of China, down 7 points from 2015. Of the seven countries tested only Russia (3%) and North Korea (0%) have lower ratings.
- President Xi is viewed favorably by just 8% of these Experts. Vladimir Putin (1%) and Kim Jong-Un (1%) receive lower ratings. Only one-in-five Experts (22%) rate President Trump favorably.
- Majorities of these Experts view China as Aggressive (82%), Militarily Strong (69%), and Innovative (55%). Very few (6% or less) associate China with the six positives characteristics tested.
- Half (48%) say they are very (13%) or somewhat (35%) familiar with China's Belt and Road Initiative.
- Two-thirds (68%) say that China cannot be trusted in their dealings with the U.S.

Washington Experts

Key Findings 2 of 3

- Just 2% rate the China-U.S. relationship positively, down 30 points from 2015. However, one-third (34%) expect that relationship to improve over the next decade, the same as in 2015.
- Of the ten issues tested those most likely to directly impact the U.S. are rated of greatest concern – trade friction, cybersecurity, and intellectual property. The issues more likely to impact just China or its near neighbors are of much less concern.
- More of these Experts (35%) blame the U.S. than blame China (22%) for the current trade tensions between the two countries; 39% blame both equally.
- More than two-thirds (71%) strongly (45%) or somewhat (26%) disapprove of President Trump’s handling of relations with China.

Washington Experts

Key Findings 3 of 3

- The three strongest messages in support of promoting good China-U.S. relations are:
 - The more the two countries cooperate the less likely they are to be drawn into armed conflict;
 - Both countries can benefit more from cooperation than from conflict;
 - The countries have mutual interests including climate change, artificial intelligence, anti-terrorism, and containing North Korea's nuclear capability.
- Those three messages together reach 94% of this Expert audience.
- China's cooperation with the U.S. to block expansion of North Korea's nuclear program is the action among ten tested that is viewed most favorably. It alone positively impacts 55% of the Expert audience.

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U.S. General Population Survey Results

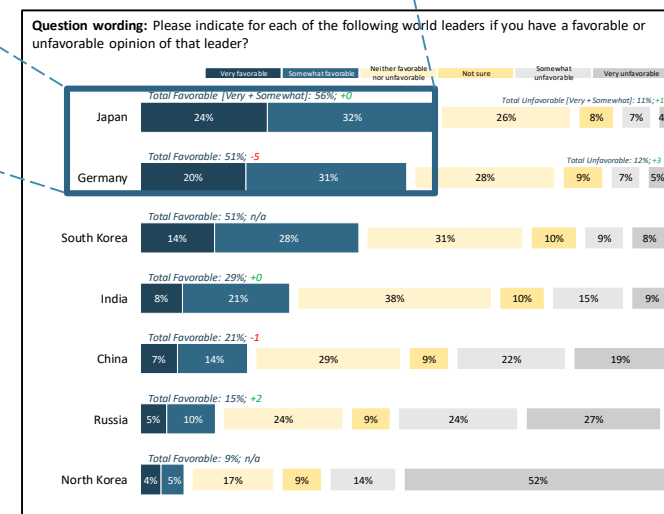
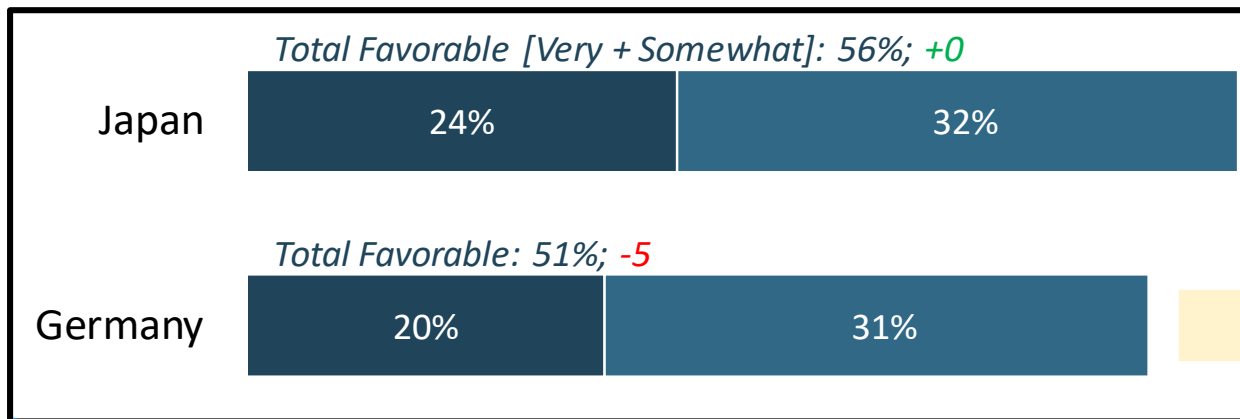
Prime Group
2019

Methodology

- Census-representative sample of adults 18+ in U.S.
- n=2,401 completes
- Survey fielded from June 10-20, 2019
- Messages supporting U.S.-China cooperation and positive actions China has taken or could take were tested using Prime Group's M3 methodology

On most slides, data are presented in a bar chart format seen below.

- The bar displays every answer category for each question or data point.
- The italics above the bar show the aggregate data for the top two answer categories; in this example it displays the Total of Very Favorable + Somewhat Favorable for each country rated.
- If the question or data point was also in the 2015 survey, the colored number to the right shows the change since 2015. Where the data have increased or stayed the same the number is shown in green, and where the data have decreased the number is shown in red.

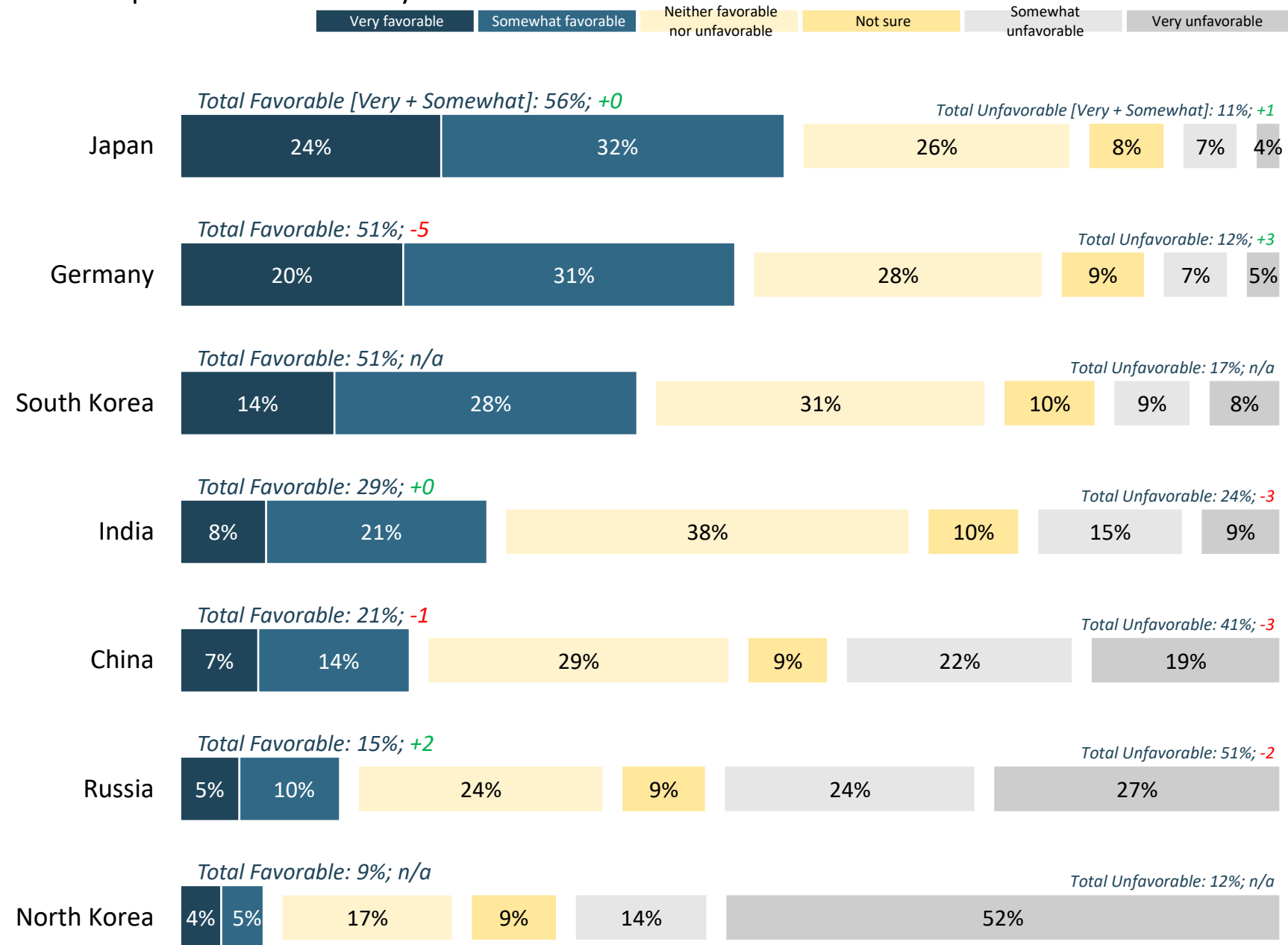


How to Read this Report

Country Favorability Ratings

China's rating has not changed since 2015 and is still twice as unfavorable (41%) as favorable (21%).

Question wording: Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that country?

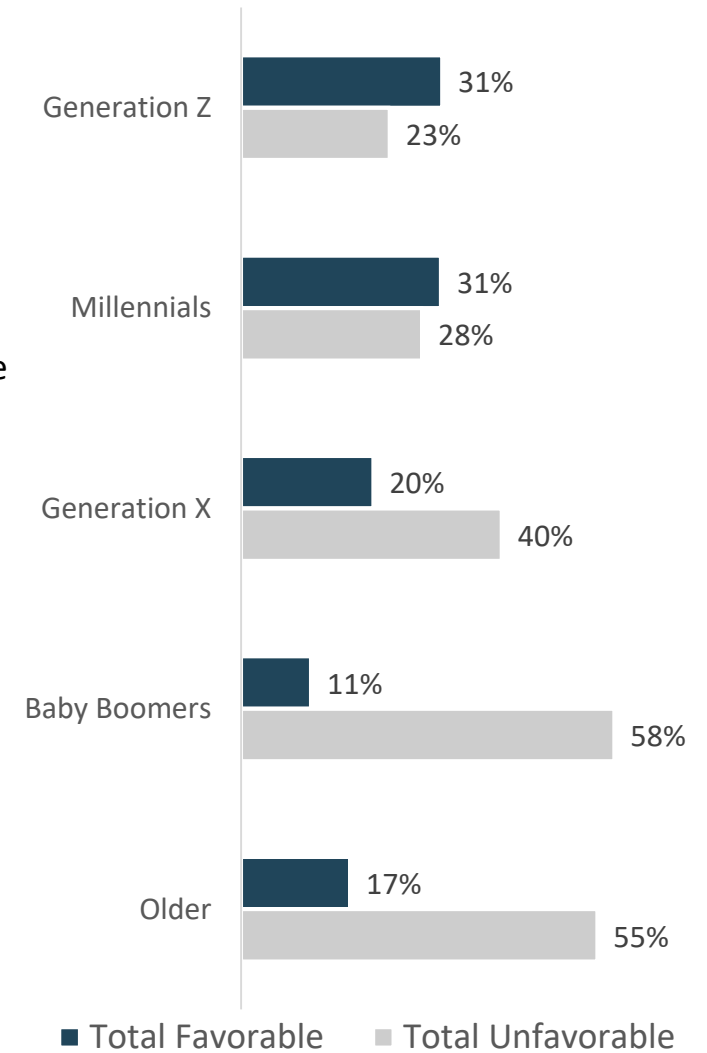
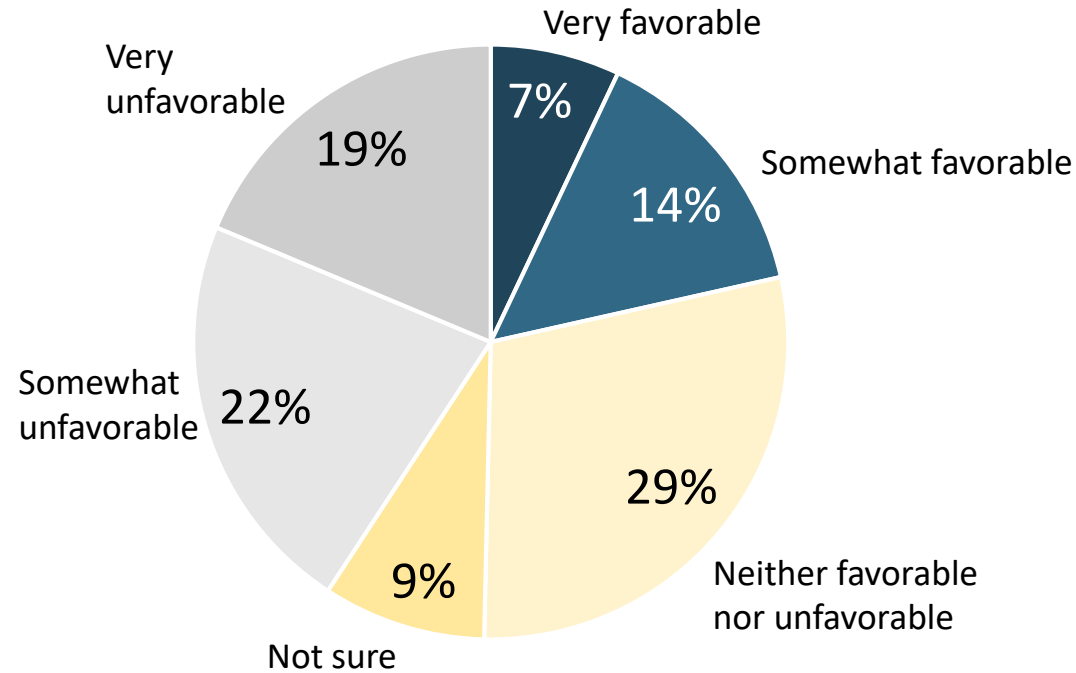


China's Favorability Rating by Generation

Americans under age 40 are more likely than older Americans to rate China positively.

Question wording: Please indicate for each of the following countries if you have a favorable or unfavorable opinion of that country?

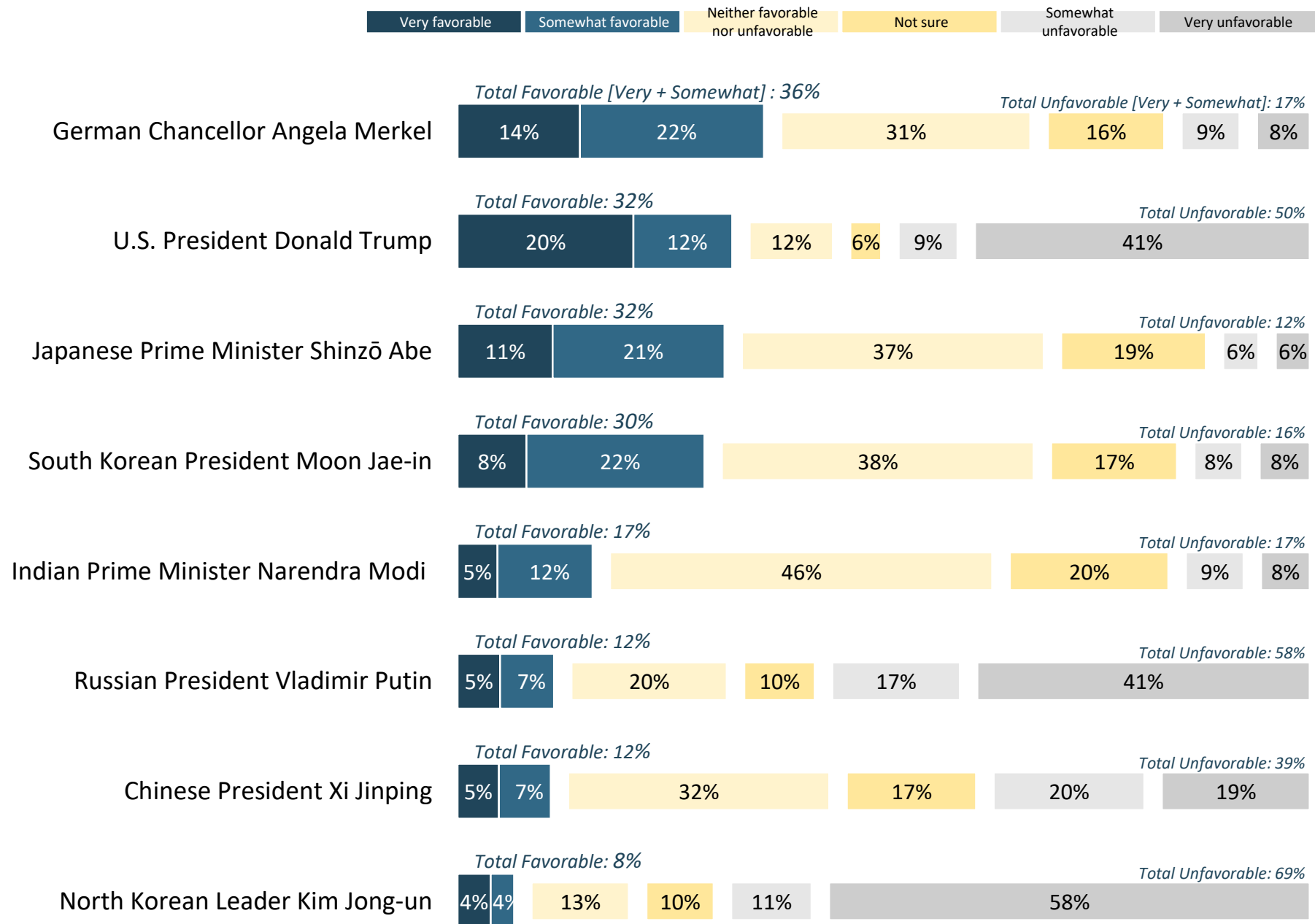
China:



Country Leader Favorability Ratings

Half of Americans are neutral or unsure about rating President Xi but his unfavorable rating (39%) is three times his favorable rating (12%).

Question wording: Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?

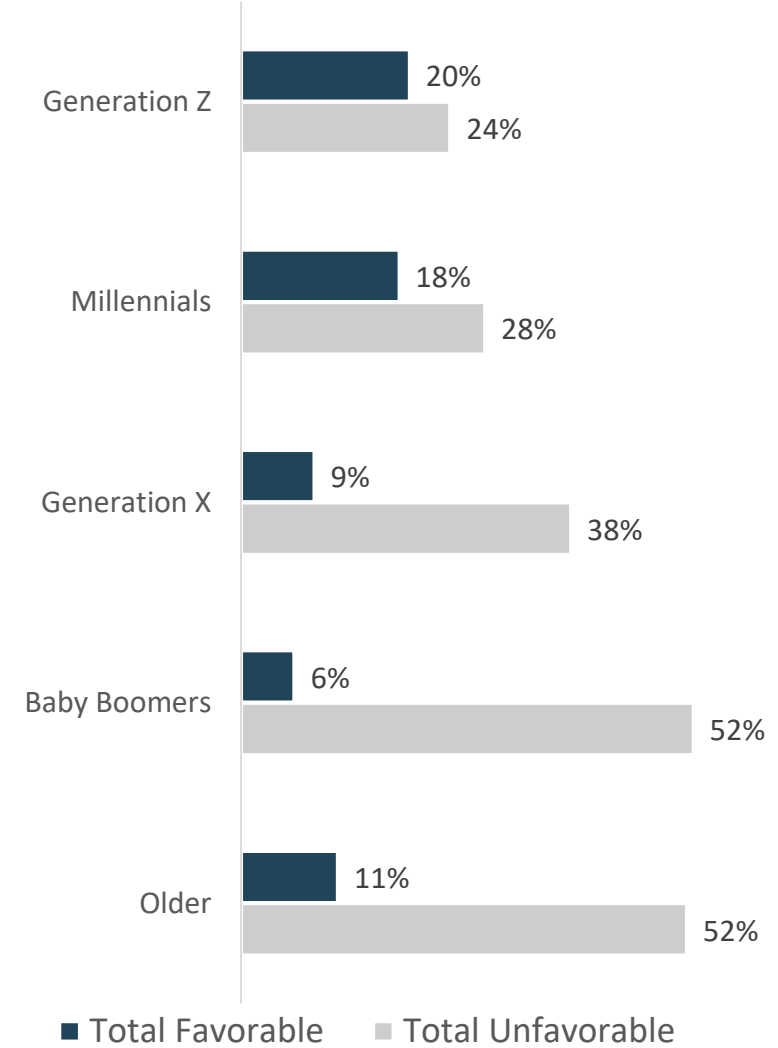
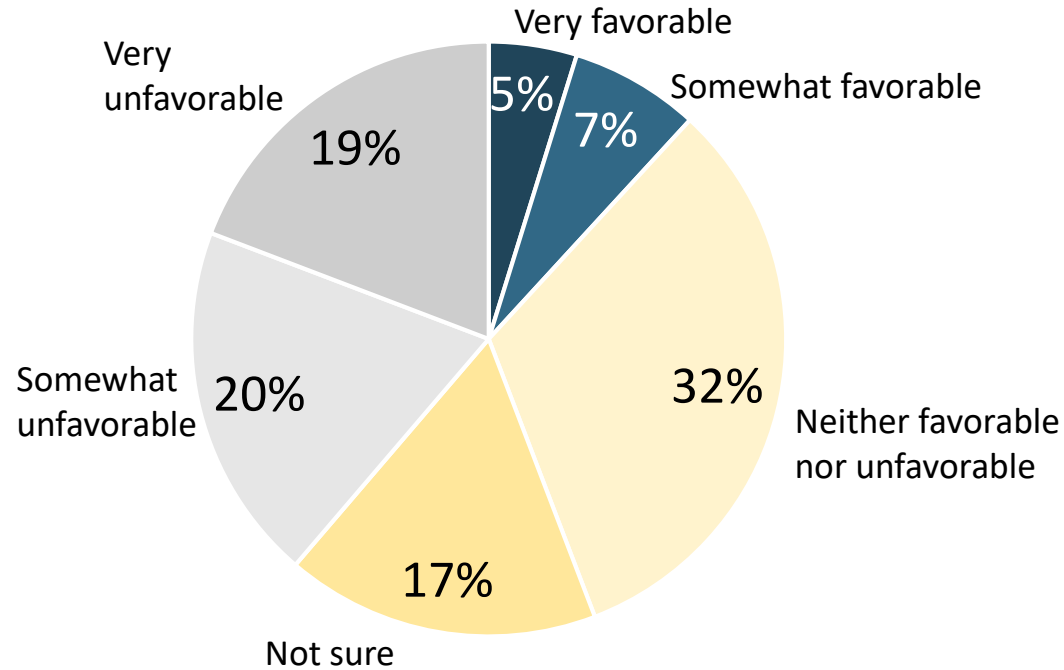


President Xi's Favorability Rating by Generation

Americans under age 40 are two to three times more likely than older Americans to rate President Xi positively.

Question wording: Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?

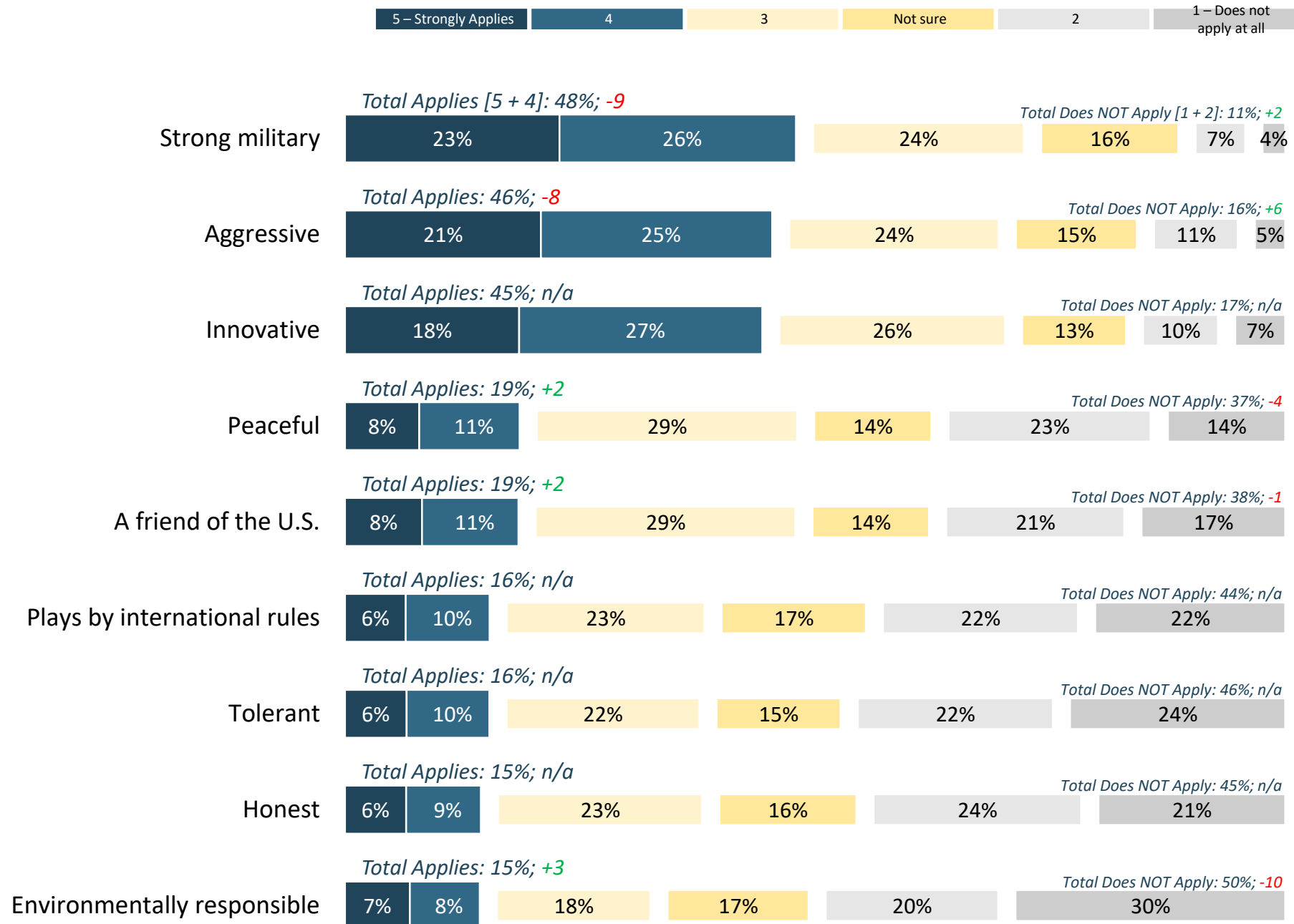
President Xi Jinping:



Perceived Attributes of China

Strong military, Aggressive, and Innovative are the three traits most associated with China (of those tested). Tolerant, Honest, and Environmentally responsible are the traits least associated with China.

Question wording: Now thinking just about **China**, for each of the following words or phrases please indicate how much you think that word or phrase applies to China using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.



Question wording: Now thinking just about **China**, for each of the following words or phrases please indicate how much you think that word or phrase applies to China using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.

% Total Applies [5 + 4]	Total	Gen Z & Millennials	Gen X	Boomers & older
Strong military	48%	40%	45%	61%
Aggressive	46%	36%	42%	61%
Innovative	45%	47%	42%	45%
Peaceful	19%	31%	17%	8%
A friend of the U.S.	19%	31%	16%	8%
Plays by international rules	16%	29%	13%	5%
Tolerant	16%	26%	14%	7%
Honest	15%	27%	13%	4%
Environmentally responsible	15%	27%	11%	5%

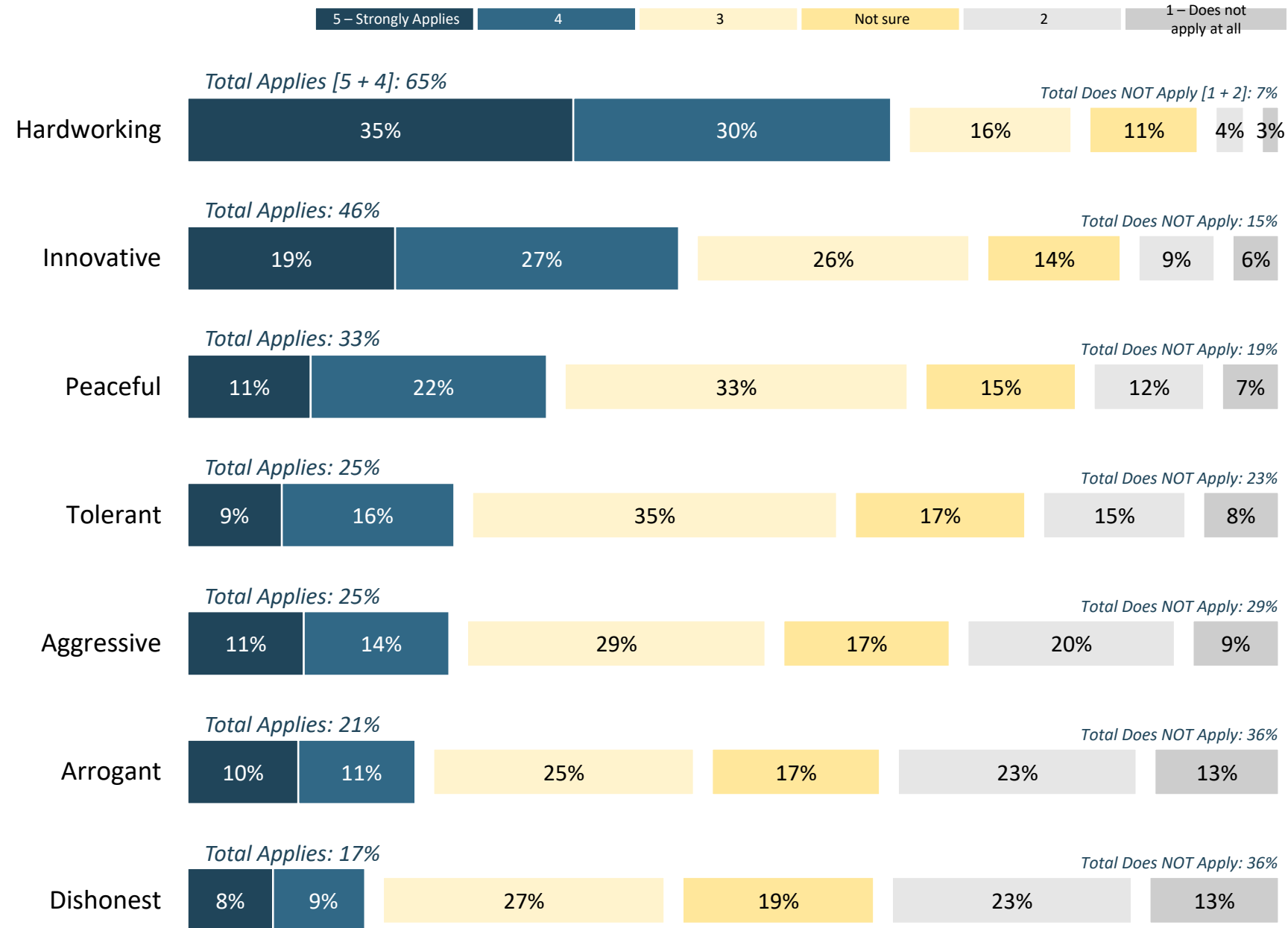
Perceived Attributes of China by Generation

Comment: Americans under age 40 are much more likely than older Americans to associate positive attributes with China.

Perceived Attributes of the Chinese People

The Chinese people are seen as hardworking, innovative, and peaceful by between one-third and two-thirds of Americans. Most Americans do not think the Chinese people are aggressive, arrogant, or dishonest.

Question wording: Now thinking just about the **Chinese people**, for each of the following words or phrases please indicate how much you think that word or phrase applies to the Chinese people using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.



Question wording: How familiar are you with a Chinese program known as the Belt and Road Initiative?

Very familiar

Somewhat familiar

Not very familiar

Not at all familiar

Familiarity with the Belt & Road Initiative

Just one-in-five Americans is familiar with the Belt and Road initiative.

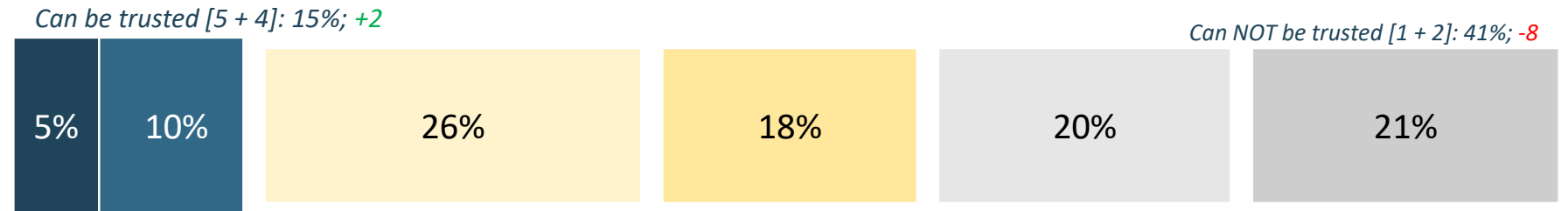
Total Familiar [Very + Somewhat]: 21%



Can China's Leadership be Trusted?

Americans' trust in China in their dealings with the U.S. has remained stable since 2015 with just 15% thinking the country is trustworthy. Those under age 40 are twice as likely (27%) to think China can be trusted.

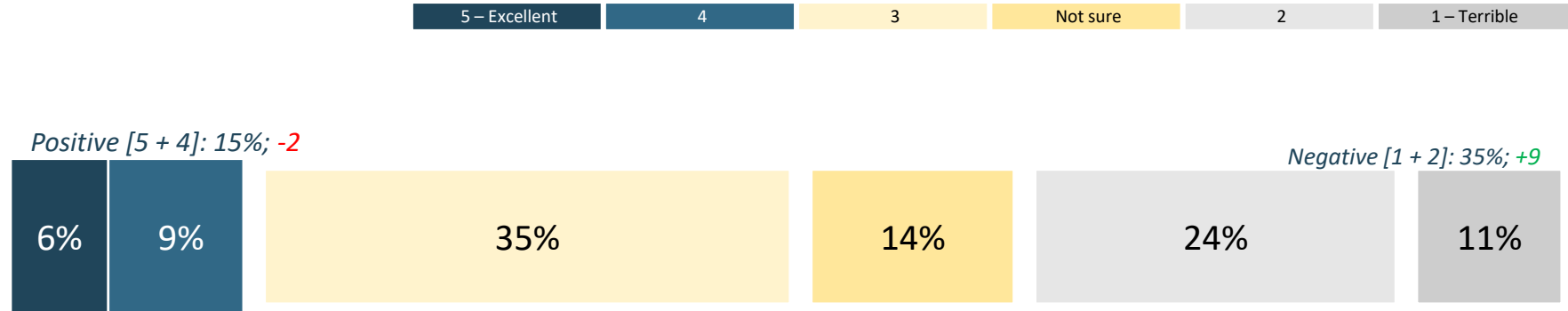
Question wording: How much do you think the leadership of China can be trusted in their dealings with the U.S. using a five-point scale where 5 is a great deal and 1 is not at all?



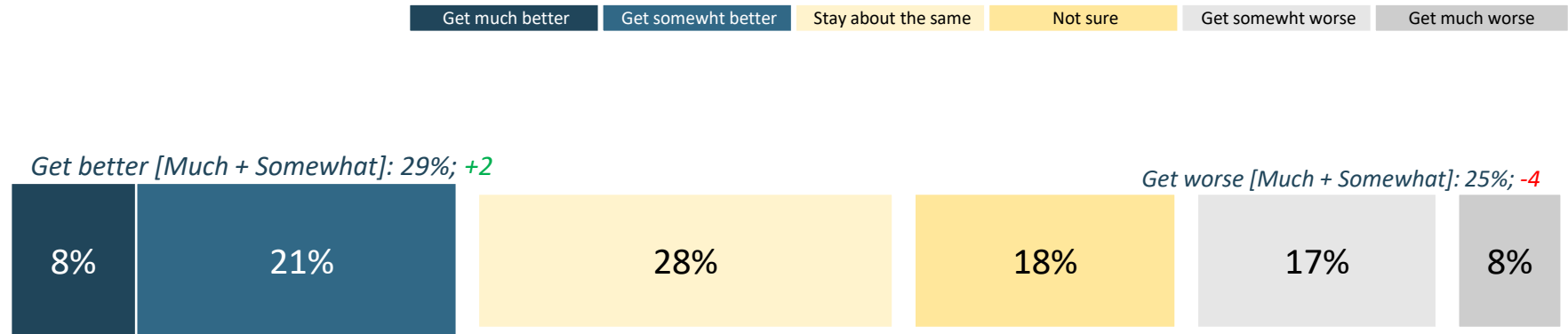
U.S.-China Relationship

Americans' view of the U.S.-China relationship is somewhat more negative than it was in 2015 while their expectations for change in that relationship is stable. Those under age 40 rate the relationship more positively (27%) and are more optimistic about the future of it (34%).

Question wording: How would you rate the relationship between the U.S. and China on a five-point scale where "5" is excellent and "1" is terrible?



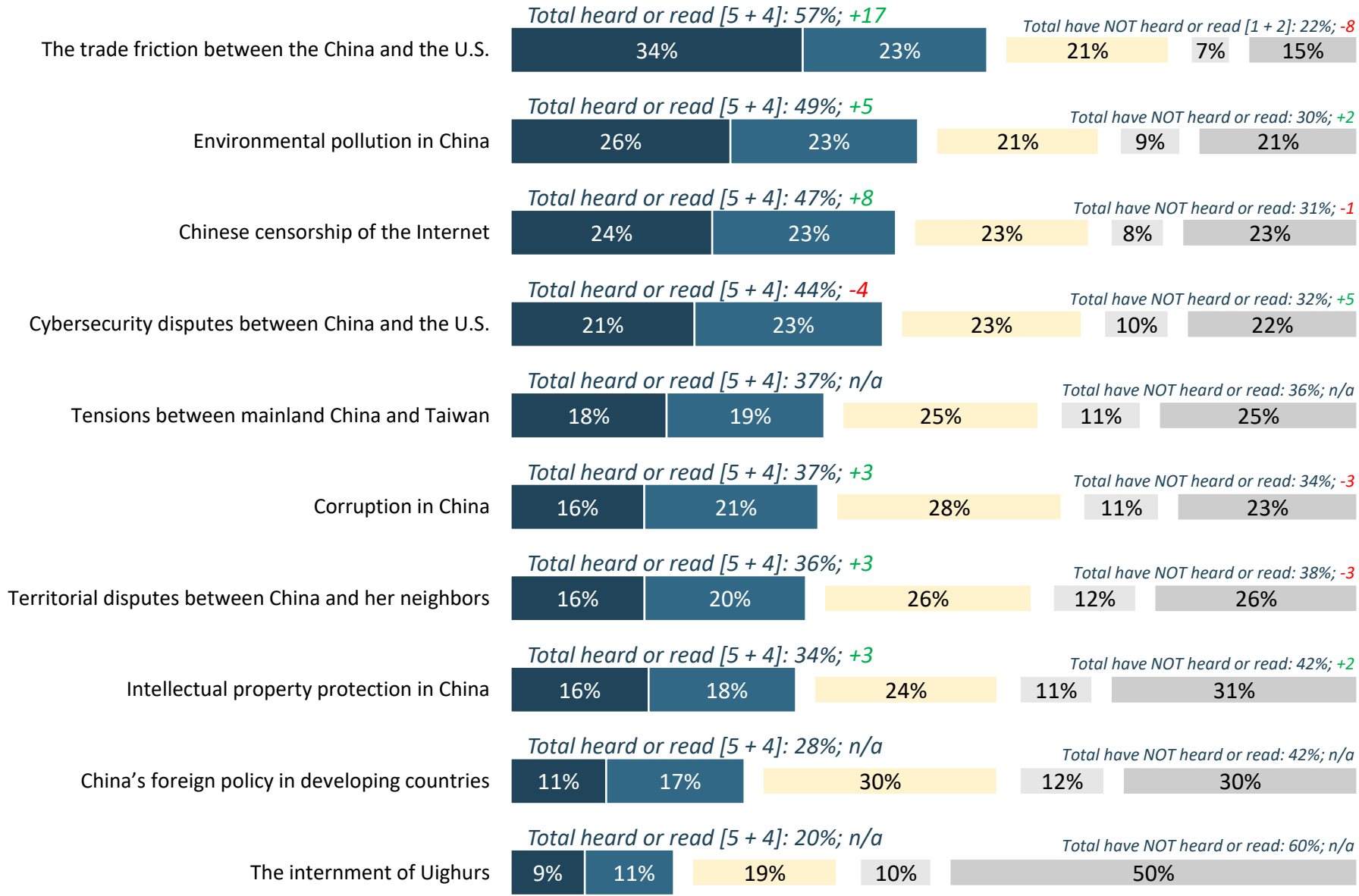
Question wording: Over the next ten years do you think the relationship between the U.S. and China will get better or worse or stay the same?



Familiarity with Issues Concerning China

Trade friction between the U.S. and China is the only issue (of ten tested) familiar to a majority of Americans. One-third or fewer Americans are familiar with the other issues tested. Those over age 55 are much more likely to be familiar with these issues.

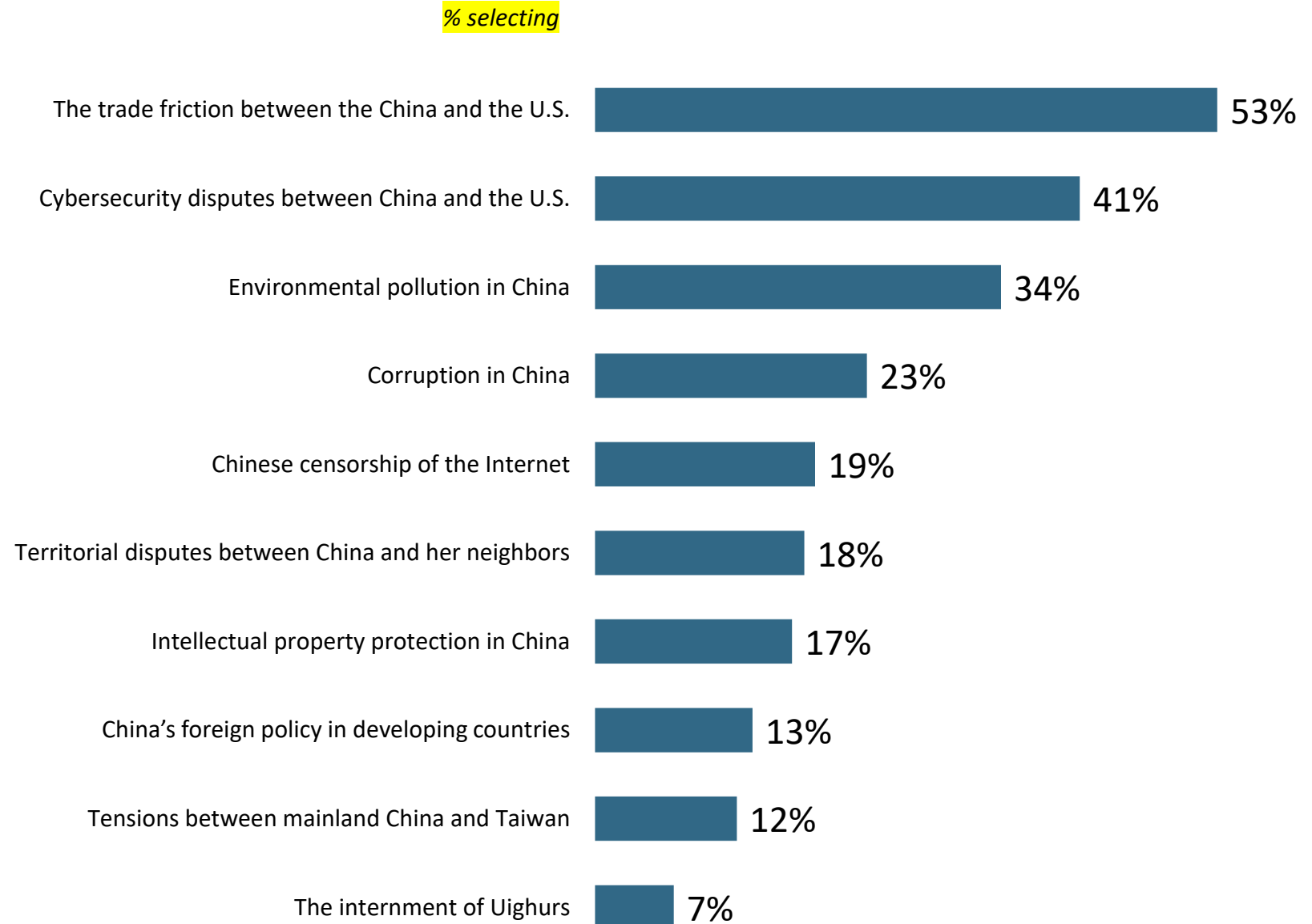
Question wording: For each of the following issues concerning China please indicate how much you have heard or read about that issue using a five-point scale where “5” means you have heard or read a great deal and “1” means you have not heard or read anything at all.



Concern with Issues about China

Trade friction, cybersecurity disputes, and environmental pollution are the issues of greatest concern to Americans (among those tested). Those over age 55 are more likely than younger Americans to be concerned with trade friction and cybersecurity disputes.

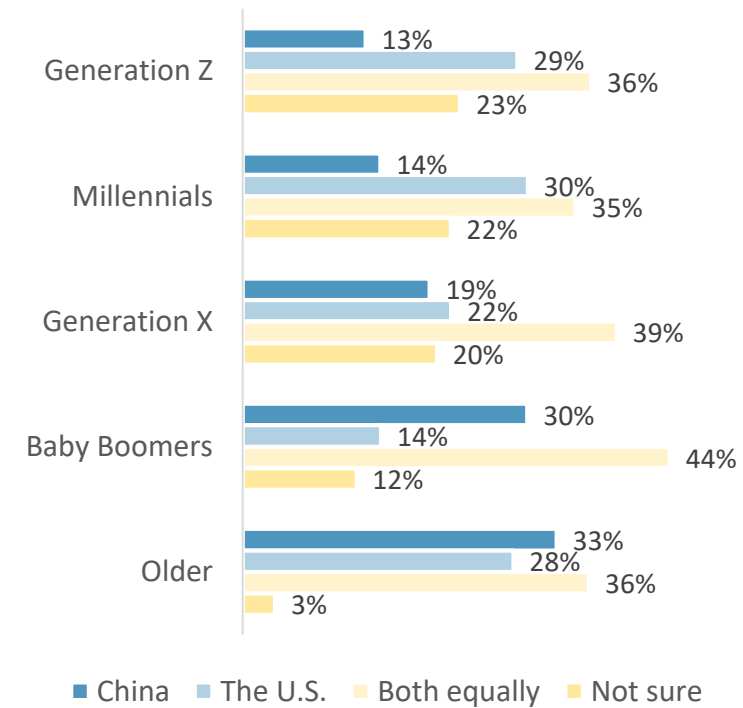
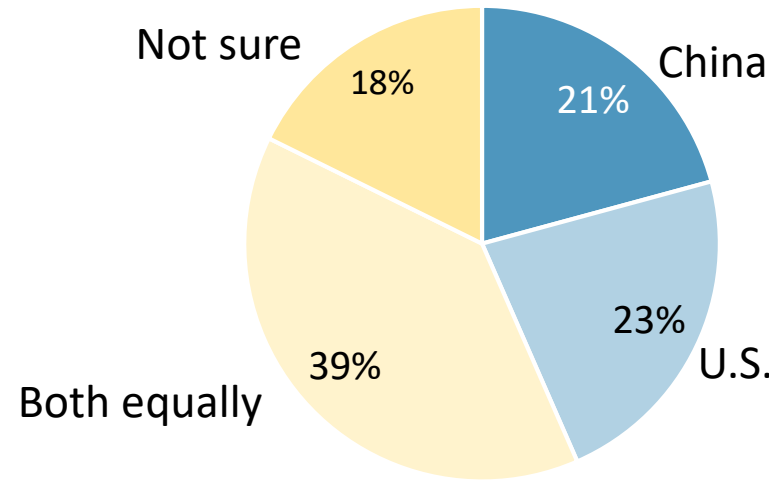
Question wording: Of the following issues which THREE cause you the greatest concern?



U.S.-China Trade Tensions

Americans hold the U.S. and China about equally responsible for the current trade tensions and half think those tensions are having a negative impact on the global economy. Those over 55 are more likely to hold China responsible while those under 40 are more likely to hold the U.S. responsible.

Question wording: Who do you think is more responsible for the trade tensions between China and the U.S.?



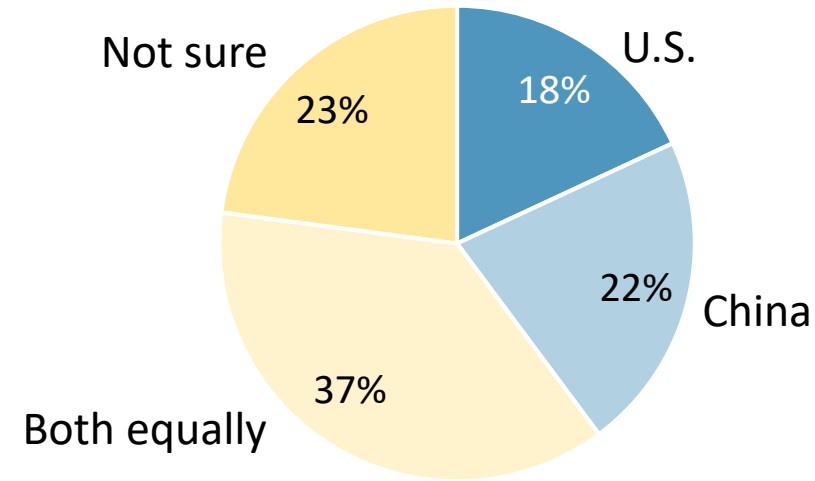
Question wording: Do you think that the current trade friction between the U.S. and China is having a positive or negative impact on the global economy?



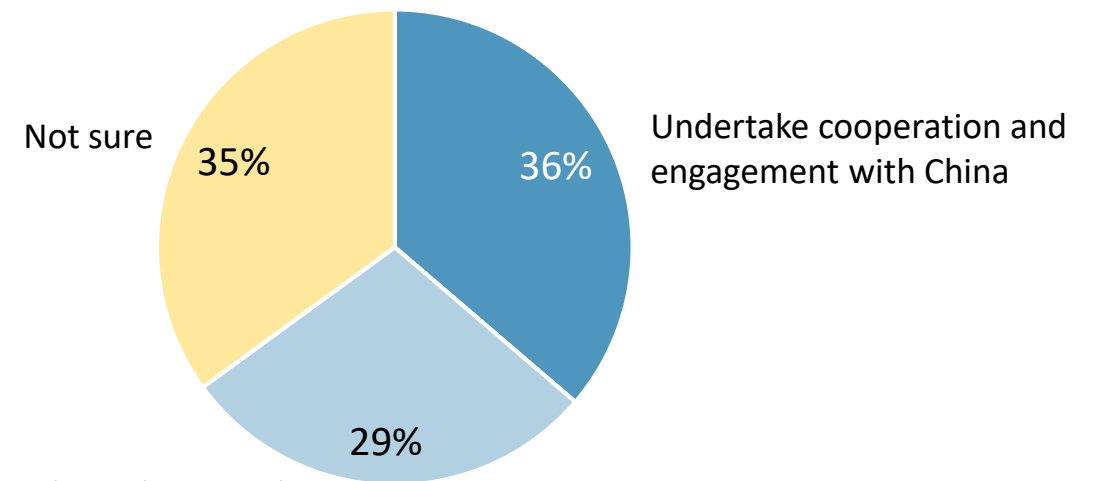
U.S.-China Trade Relations

Americans are evenly divided on whether the U.S. or China benefit more from increased trade. More think the U.S. should engage and cooperate with China than think it should try to limit China's global influence.

Question wording: Who will benefit more from increased China-U.S. trade?

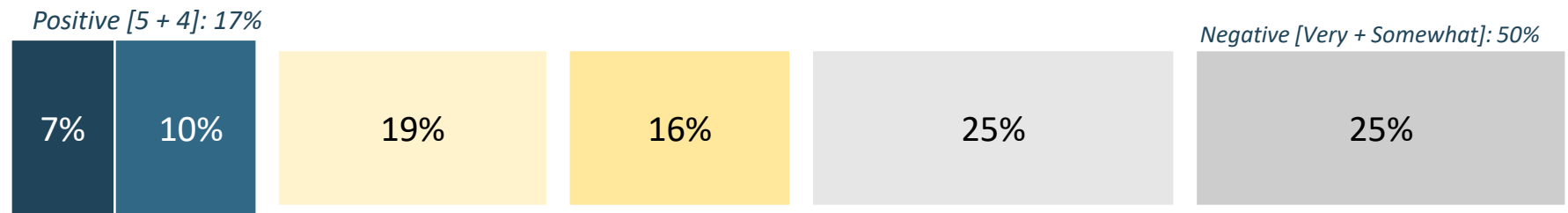
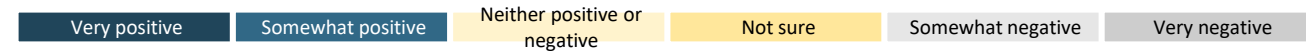


Question wording: In dealing with the **growth of China's influence abroad**, which of the following do you think the U.S. should pursue?



Actively work to limit the growth of China's influence abroad

Question wording: Do you think the tariffs on imported goods imposed first by the US and then by China are having a positive or a negative effect on the trading relationship between the two countries?



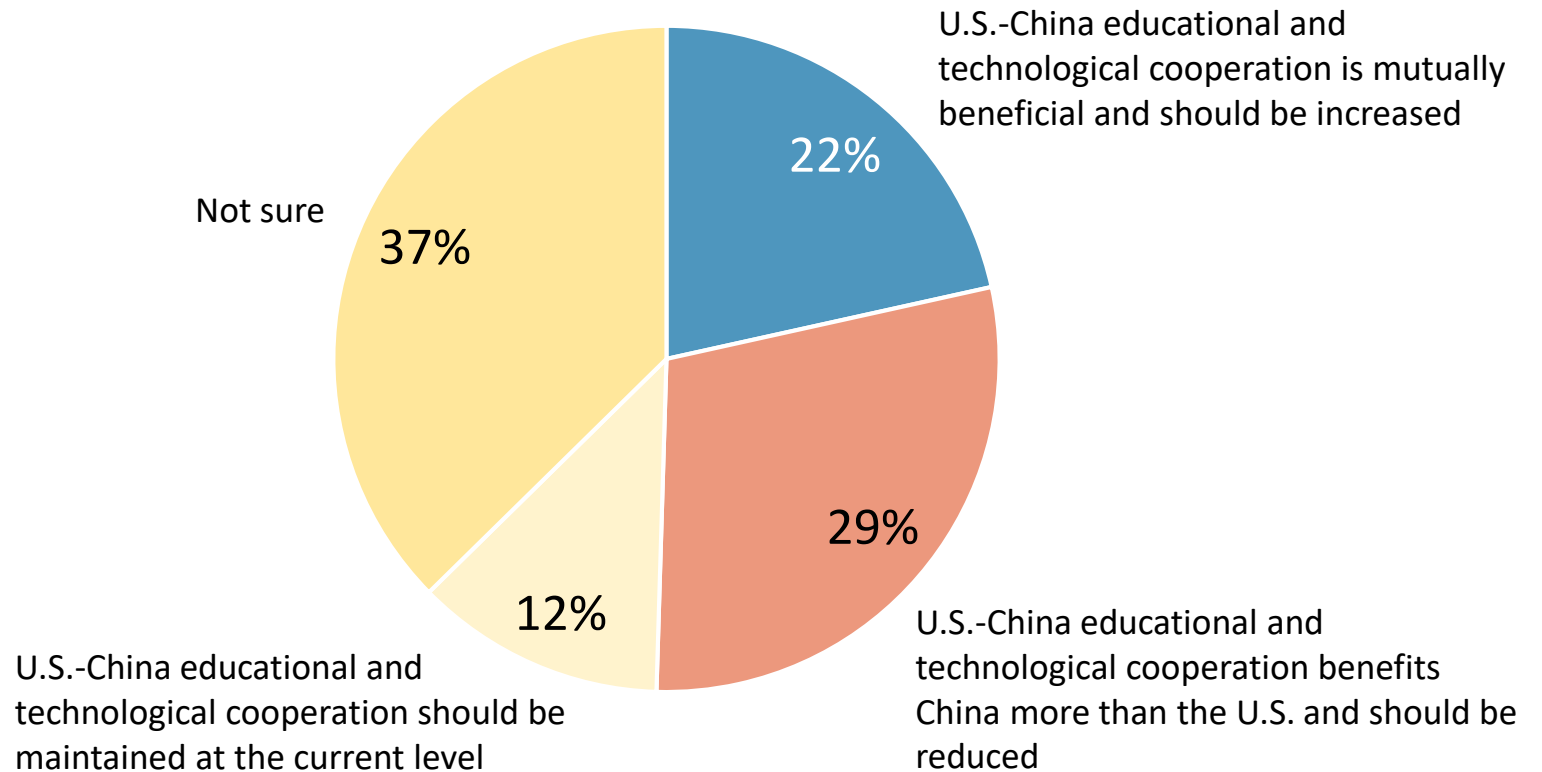
Impact of Tariffs

Overwhelmingly (50% to 17%) Americans think the current round of bilateral tariffs is negatively affecting the trading relationship between the two countries.

U.S.-China Educational and Technological Cooperation

Americans are evenly divided on whether U.S.-China educational and technological cooperation should be increased / kept the same (34%) or whether it should be reduced (29%).

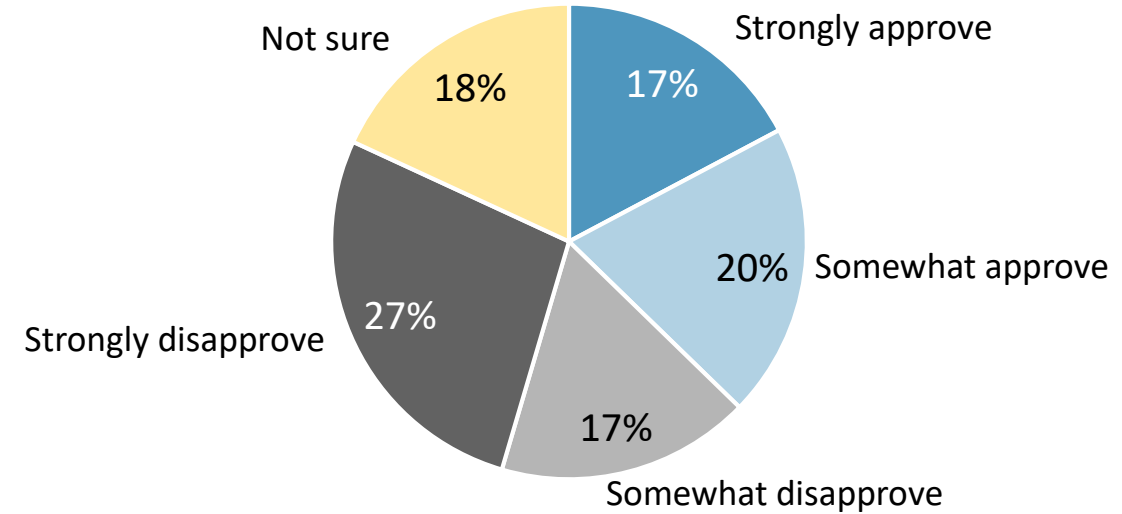
Question wording: U.S.-China educational and technological cooperation has been negatively affected by the recent tensions between the two countries. Which of the following statements is closest to your own opinion?



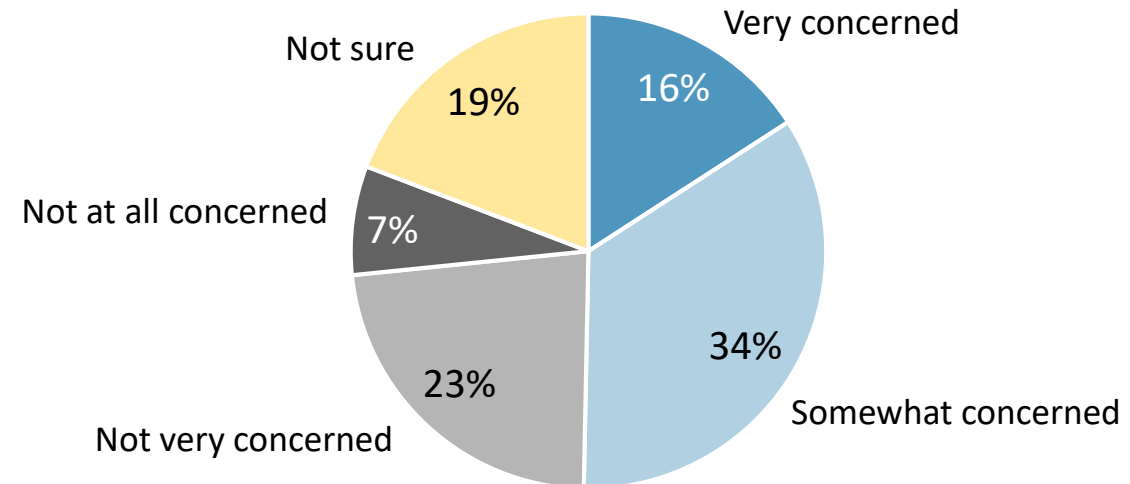
U.S.-China Relations and U.S. Politics

More Americans disapprove of President Trump's handling of U.S.-China relations (44%) than approve (37%). Half say they are concerned about Chinese influence in U.S. domestic politics.

Question wording: Do you approve or disapprove of the job that the Trump administration is doing in handling U.S. relations with China?



Question wording: Are you concerned about Chinese influence in U.S. domestic politics, or not?



Question wording: Overall, do you think that China's economic growth is:

5 (A good thing for the U.S.)

4

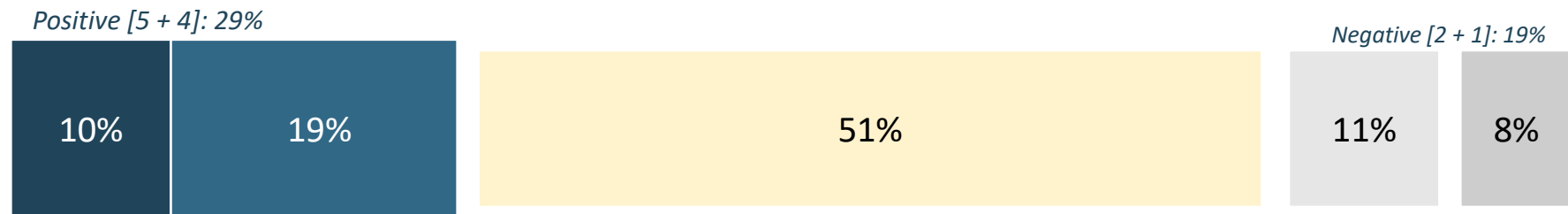
3

2

1 (A bad thing for the U.S.)

Impact of China's Economic Growth on U.S.

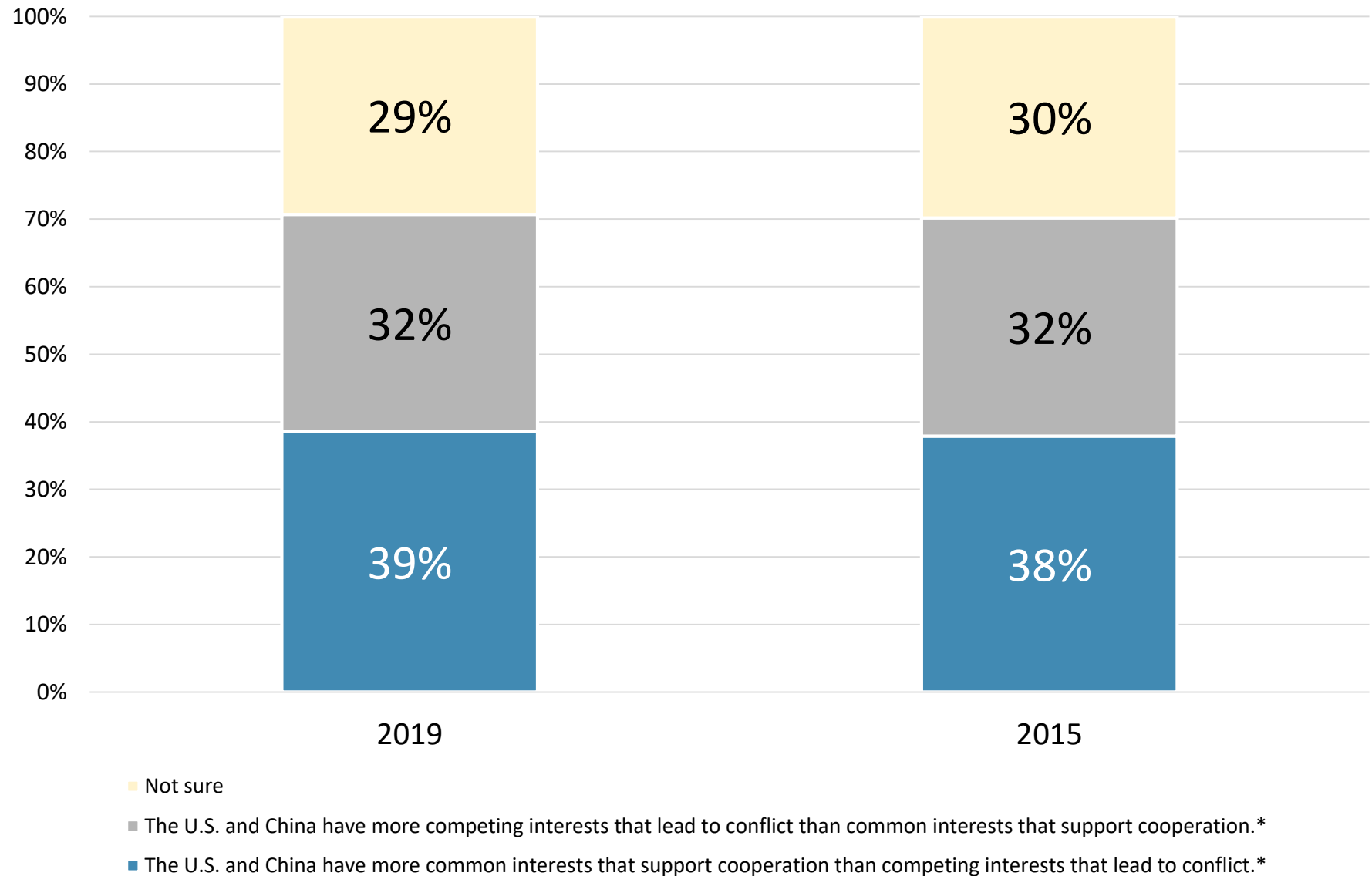
More Americans see China's economic growth as positive for the U.S. (29%) than as negative (19%). Those under 40 are more likely than older Americans to see China's economic growth positively.



U.S.-China Interests

Views on whether U.S. and Chinese interests will lead to cooperation or conflict are unchanged since 2015 with slightly more Americans saying conflict than cooperation.

Question wording: Which of the following views is closer to your own?



*2015 response wording: Some people say that the United States and China have such different values that cooperating on international problems is impossible.

*2015 response wording: Some people say that the United States and China have enough common values to be able to cooperate on international problems.



General Population M3 Message Testing

M3 Message Testing: Overview

- We tested 10 messages using Prime Group’s M3 methodology.
- M3 testing is a forced choice methodology requiring respondents to react to a series of screens, each with four messages.
- Respondents are asked to choose the strongest and the weakest message on each screen. Each message is repeated multiple times but always with a different set of “competing” messages.
- With this sample size (n=2,401) this methodology produces more than 96,000 unique data points, resulting in much greater precision and differentiation than traditional rating exercises which rely on each message being rated independently.



M3 Message Testing: Sample Screen

Below are four reasons that some people give for why it is important for the U.S. and China to find ways to cooperate with one another and avoid excessive competition and conflict. Please read the reasons carefully and then select:

- the single **STRONGEST** reason for the U.S. and China to cooperate; and
- the single **WEAKEST** reason for the U.S. and China to cooperate.

Each reason will repeat several times across the eight screens.

Strongest reason		Weakest reason
<input type="radio"/>	China's economic growth has come peacefully and should be encouraged through continued cooperation.	<input type="radio"/>
<input type="radio"/>	The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	<input type="radio"/>
<input type="radio"/>	Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	<input type="radio"/>
<input type="radio"/>	China is an extremely important market for U.S. goods and services and cooperating with China is the best way to get maximum access to this market.	<input type="radio"/>

(1 of 8)

M3 Message Testing: How to Interpret the Results

- **Preference Scores:**
 - Through the M3 process, respondents reveal their relative preferences for the each message.
 - These scores are NOT percentages.
 - Taken together the preference scores for all messages will always add to 100.
 - In effect respondents collectively distribute 100 points across the messages based on their relative appeal.
- **Reach Analysis:**
 - While the preference scores tell us the relative ranking of the messages for all respondents, a message's "reach" equals the percentage of respondents ranking that item as their favorite or second favorite message.
 - The "reach" for any two messages equals the percentage of respondents ranking either message as their favorite or second favorite.
 - Our algorithm examines the total reach for every possible message combination and determines the message packages that have the broadest appeal.
 - As an analogy, think of individual messages as items on a restaurant menu. Similar menu items such as two types of steak attract the same type of customer. Adding different types of menu items, such as seafood or vegetarian selections, broaden the overall appeal of the menu by "reaching" different customer types.



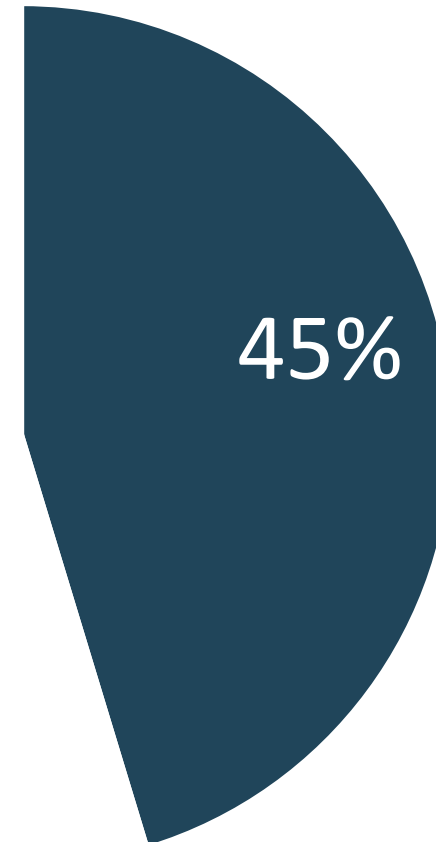
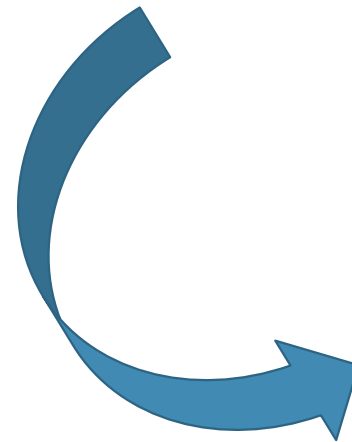
M3: Best Messages Supporting U.S.-China Cooperation

The “largest economies” and the “avoiding armed conflict” messages scored significantly better in 2019 than in 2015.

		Score
<i>Tier 1</i>	The U.S. and China should find ways to cooperate on common interests such as climate change, artificial Intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	14.7
	As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.	13.6
	The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.	12.3
<i>Tier 2</i>	The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.	10.3
	China is an extremely important market for U.S. goods and services and cooperating with China is the best way to get maximum access to this market.	10.0
	Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	9.4
	The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.	8.1
<i>Tier 3</i>	Cooperating with China is the best way to encourage the country to continue improving the environment and dealing with climate change.	7.9
	The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.	7.7
	China’s economic growth has come peacefully and should be encouraged through continued cooperation.	6.0

M3 Reach Analysis: Best Messages Supporting U.S.- China Cooperation

45% of respondents
identified this message as
the strongest or second-
strongest message



The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.
(#1 message by preference score)

The optimal five message package reaches **93% of respondents**

M3 Reach Analysis: Best Messages Supporting U.S.- China Cooperation

Cooperating with China is the best way to encourage the country to continue improving the environment and dealing with climate change.

(#8 message by preference score)

The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.

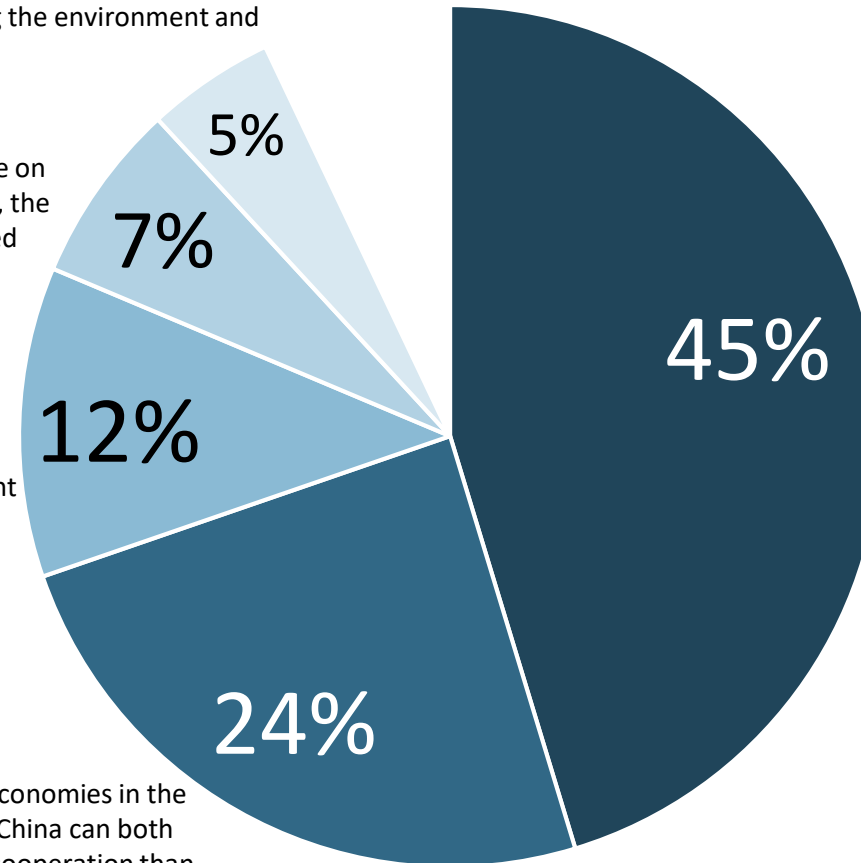
(#3 message by preference score)

The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together than to act as rivals.

(#4 message by preference score)

As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.

(#2 message by preference score)



The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.
(#1 message by preference score)



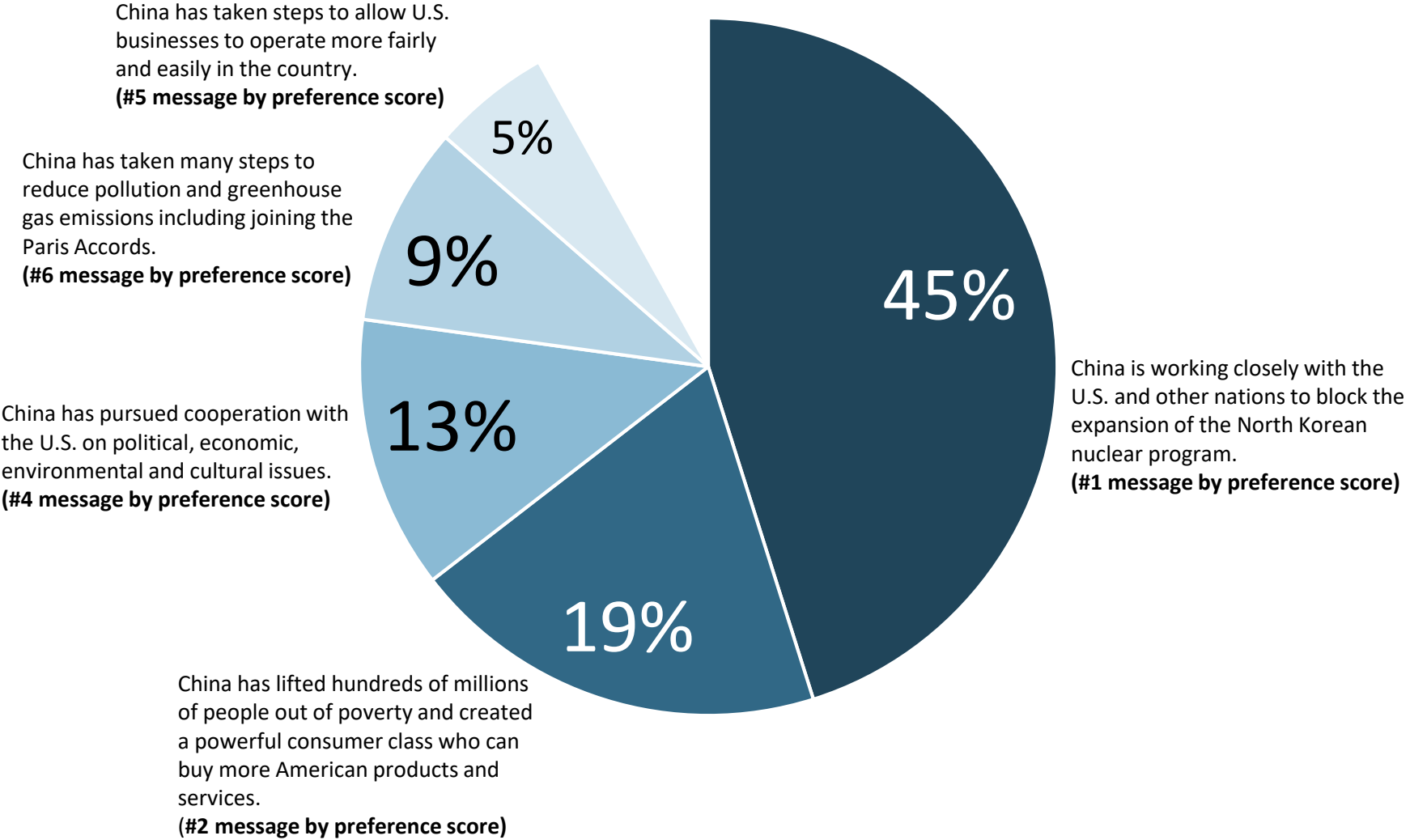
M3: Most Positive Actions China Has or Could Take

China's cooperation with the U.S. on blocking North Korea's nuclear expansion is viewed by Americans as the strongest action that China could take by a significant margin.

		Score
<i>Tier 1</i>	China is working closely with the U.S. and other nations to block the expansion of the North Korean nuclear program.	14.5
	China has lifted hundreds of millions of people out of poverty and created a powerful consumer class who can buy more American products and services.	11.3
	China is investing heavily in science and technology, which will lead to new breakthroughs that benefit the entire world.	10.9
	China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.	10.8
<i>Tier 2</i>	China has taken steps to allow U.S. businesses to operate more fairly and easily in the country.	9.9
	China has taken many steps to reduce pollution and greenhouse gas emissions including joining the Paris Accords.	9.9
	China is pursuing policies of political reform and increased freedom.	8.9
	China and the U.S. have continued the enhancement of military cooperation and information sharing with each other.	8.6
<i>Tier 3</i>	China is pursuing an anti-corruption movement that has already brought many public officials to justice.	7.7
	China has taken steps to prevent international cyber hacking.	7.5

The optimal five action package reaches **92% of respondents**

M3 Reach Analysis: Most Positive Actions China Has or Could Take



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Washington Experts Survey Results

Prime Group
July 2019

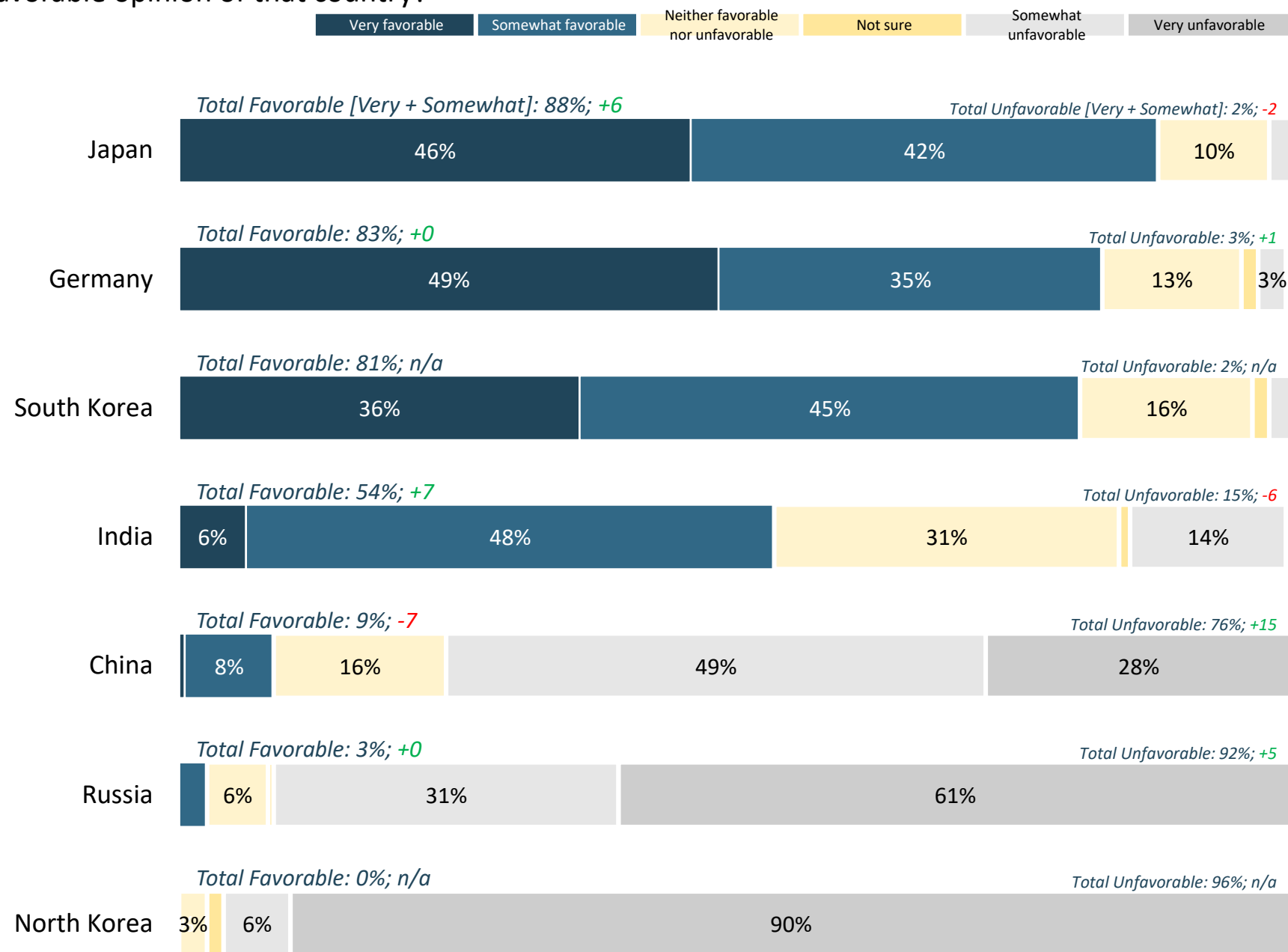
Methodology

- Washington Experts, n=200
- Washington Experts are lawyers, lobbyists, association executives, academics, and think tank experts involved in politics and public policy who serve as proxies for current policy makers.
- Survey fielded from July 17-August 9, 2019
- Messages supporting U.S.-China cooperation and positive actions China has taken or could take were tested using Prime Group's M3 methodology

Country Favorability Ratings

Favorable opinion of China has deteriorated among these Experts since 2015.

Question wording: Please indicate for each of the following countries if you have a favorable or unfavorable opinion of that country?

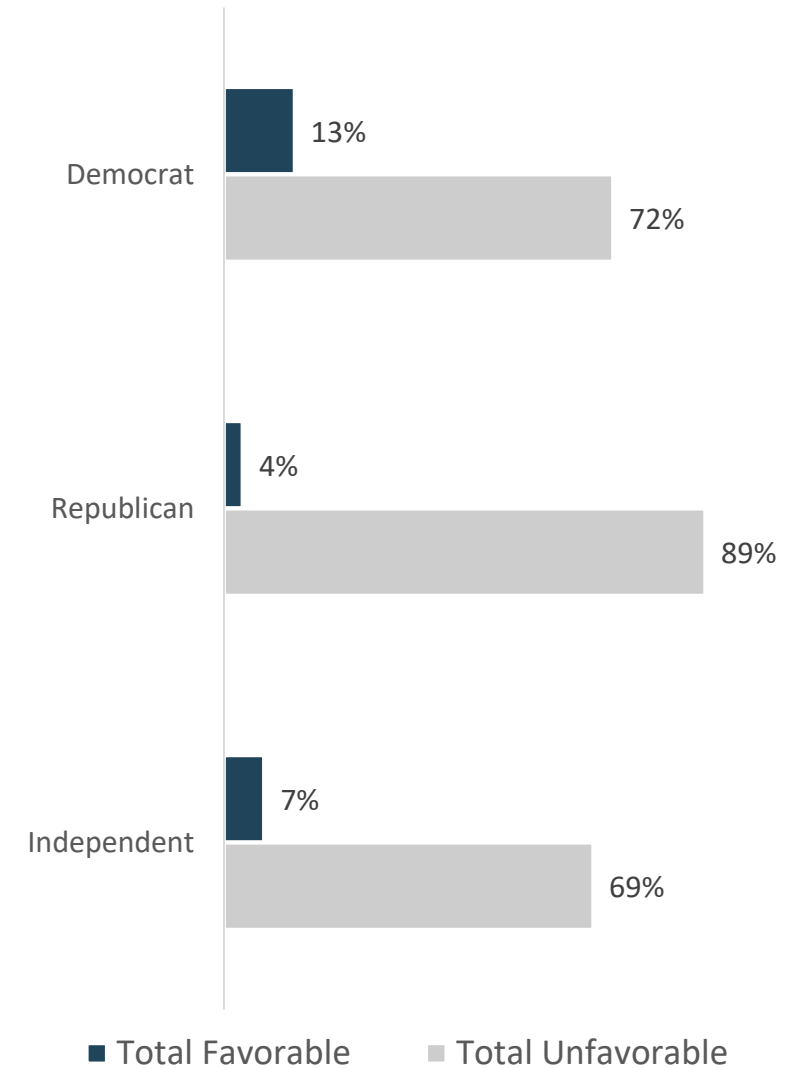
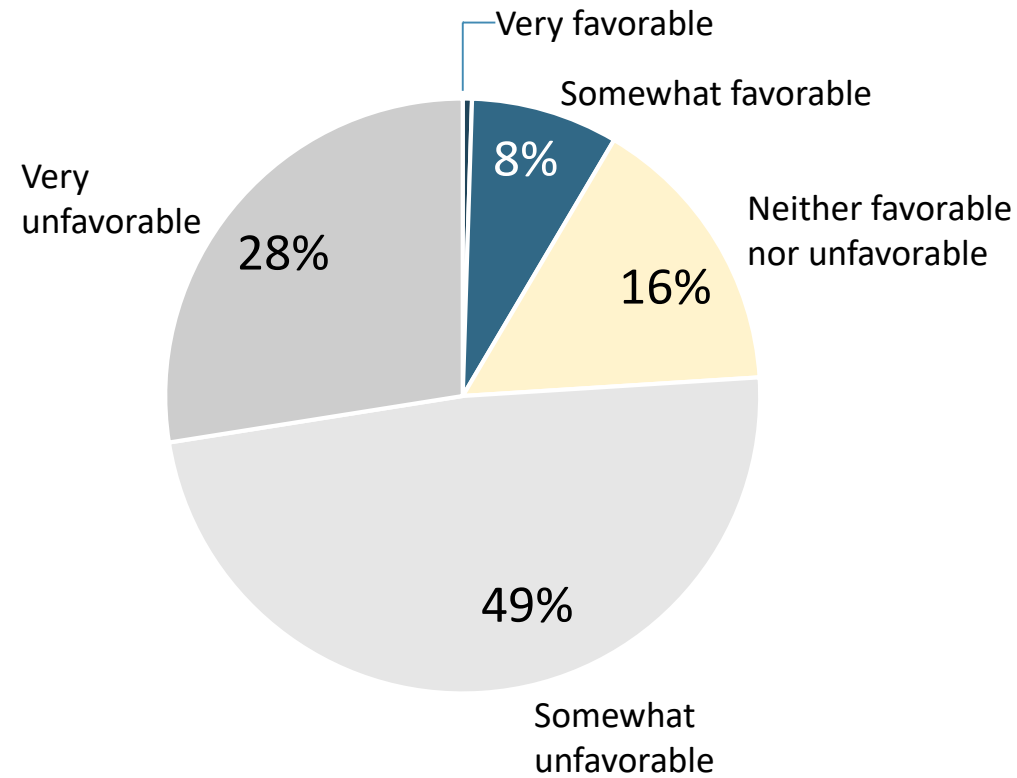


China's Favorability Rating

Republicans are more negative toward China than Democrats or Independents.

Question wording: Please indicate for each of the following countries if you have a favorable or unfavorable opinion of that country?

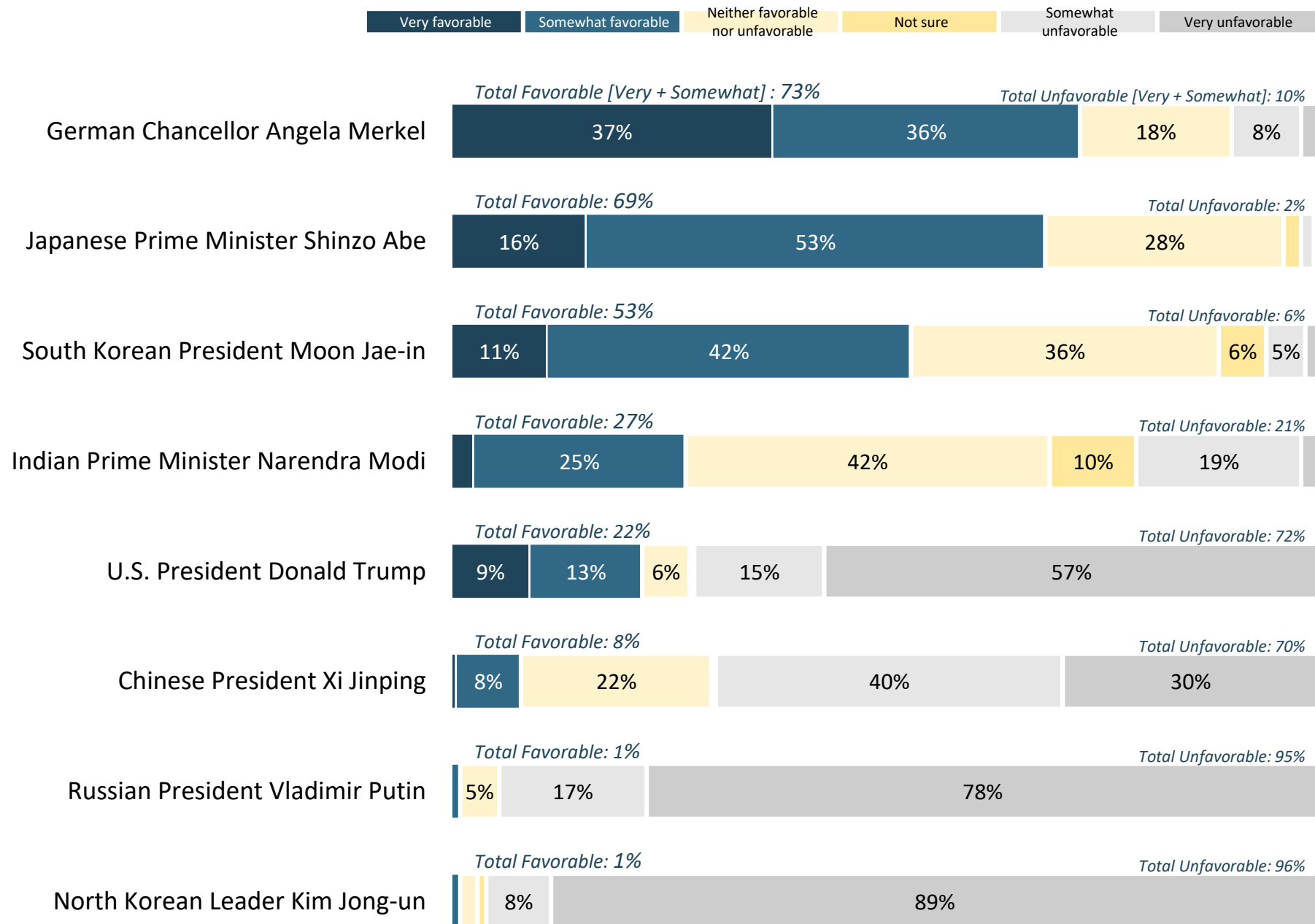
China:



Country Leader Favorability Ratings

Only Vladimir Putin and Kim Jong-Un rate more negatively than President Xi.

Question wording: Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?

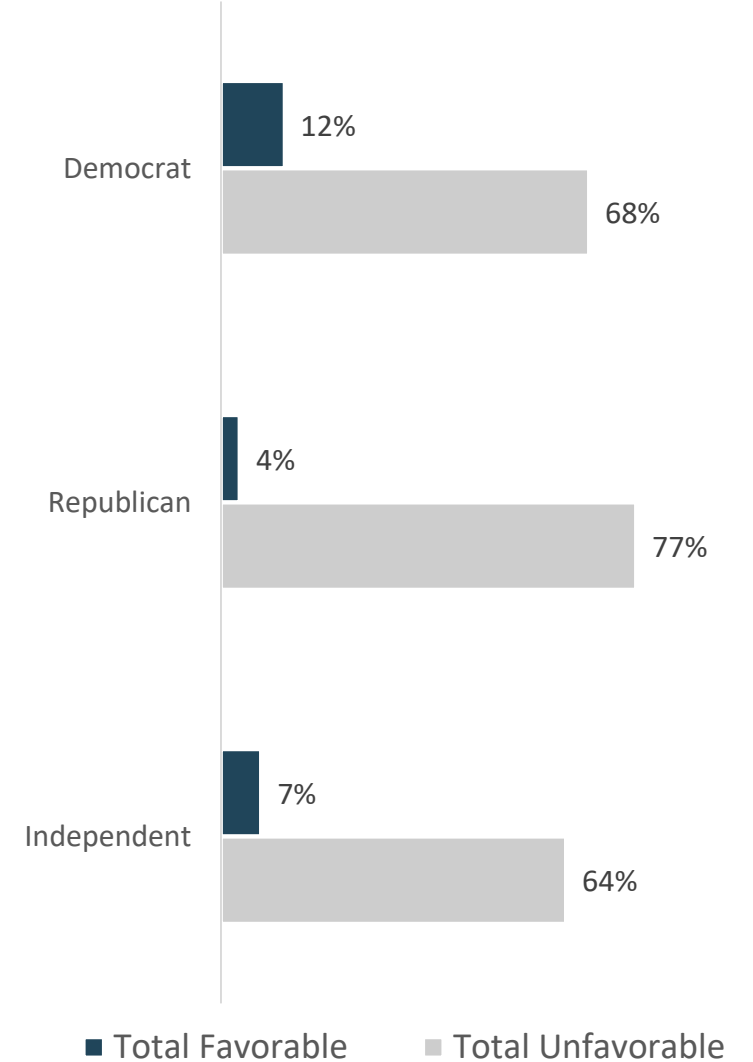
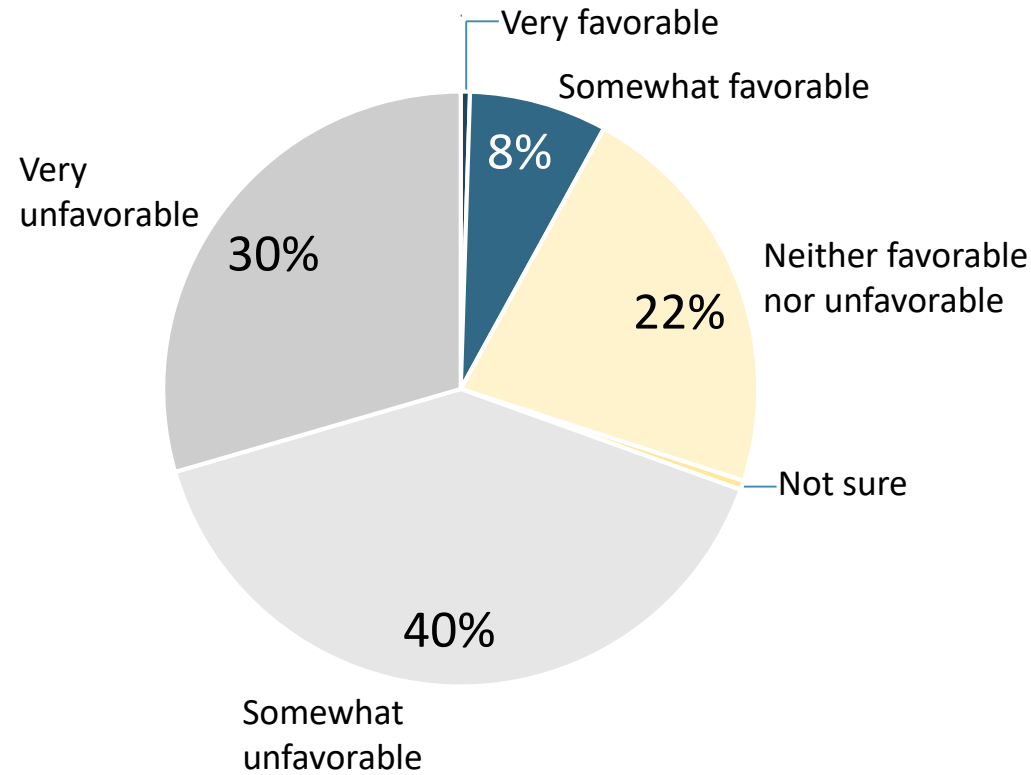


President Xi's Favorability Rating

Democrats are three times as likely as Republicans to rate President Xi favorably.

Question wording: Please indicate for each of the following world leaders if you have a favorable or unfavorable opinion of that leader?

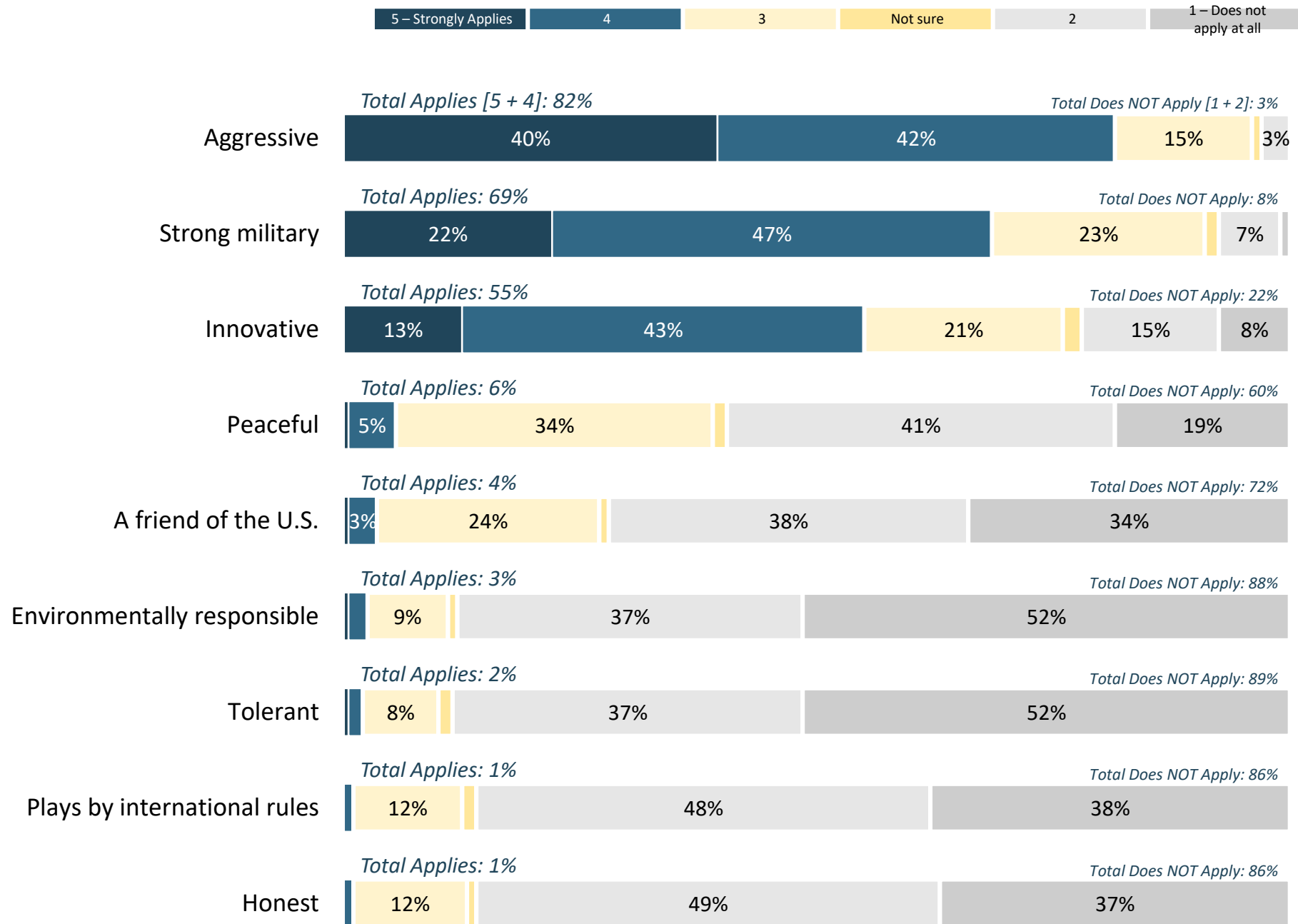
President Xi Jinping:



Perceived Attributes of China

These Experts see China as aggressive, militarily strong, and innovative. Few associate China with the other six positive attributes tested.

Question wording: Now thinking just about **China**, for each of the following words or phrases please indicate how much you think that word or phrase applies to China using a five-point scale where “5” means it strongly applies and “1” means it does not apply at all.



Question wording: How familiar are you with a Chinese program known as the Belt and Road Initiative?

Very familiar

Somewhat familiar

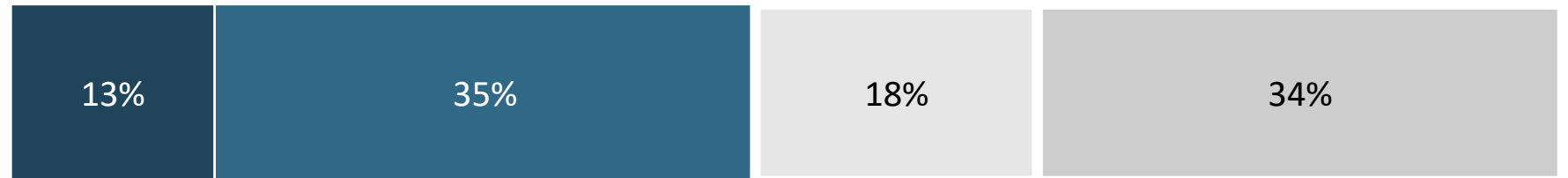
Not very familiar

Not at all familiar

The Belt & Road Initiative

Half of these Experts say they are familiar with the Belt and Road initiative.

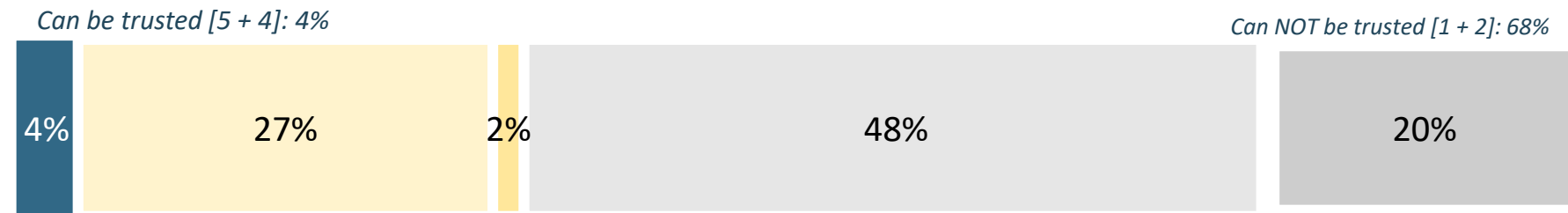
Total Familiar [Very + Somewhat]: 48%



Can China's Leadership be Trusted?

There is very little trust among these Experts in China's leadership.

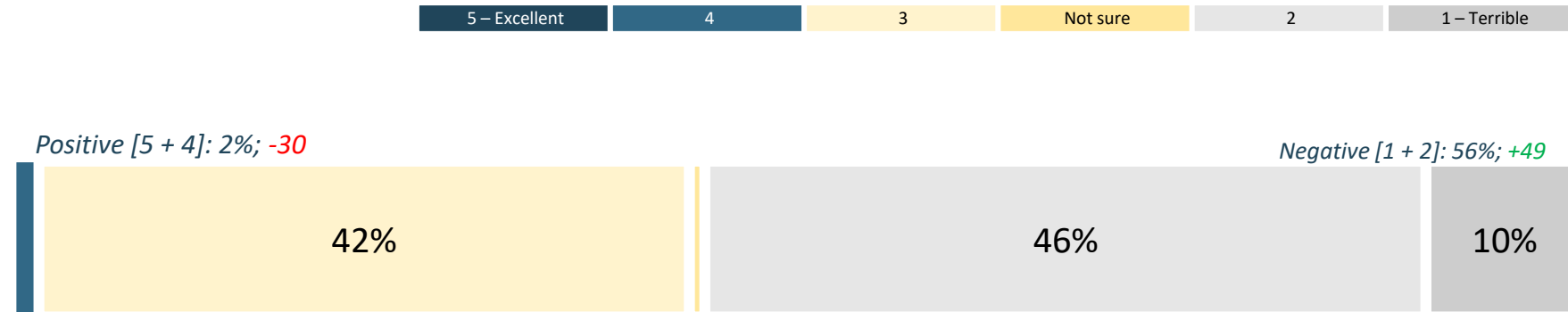
Question wording: How much do you think the leadership of China can be trusted in their dealings with the U.S. using a five-point scale where 5 is a great deal and 1 is not at all?



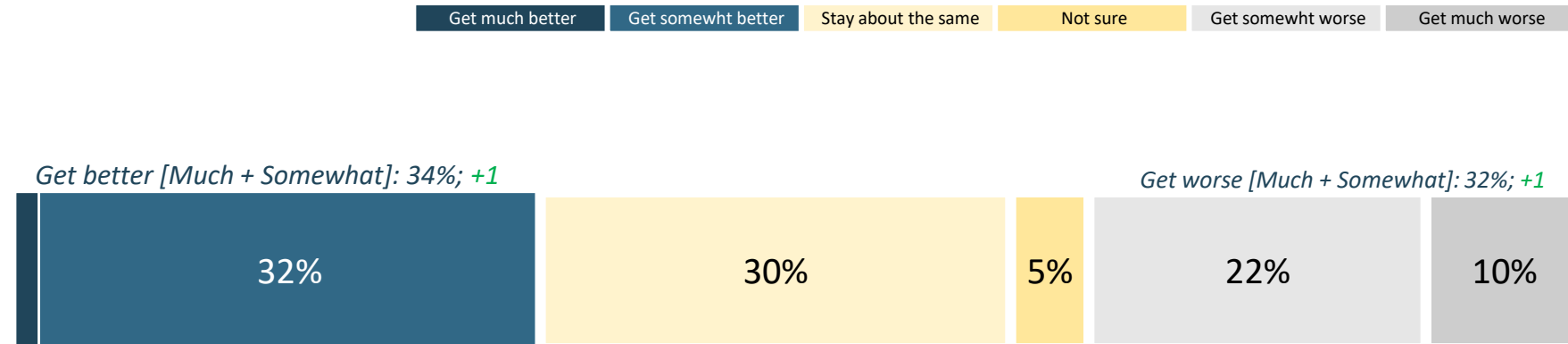
U.S.-China Relationship Now and In the Future

Expert views on the China-U.S. relationship have deteriorated significantly since 2015. Optimism for improvement, however, has remained stable.

Question wording: How would you rate the relationship between the U.S. and China on a five-point scale where “5” is excellent and “1” is terrible?



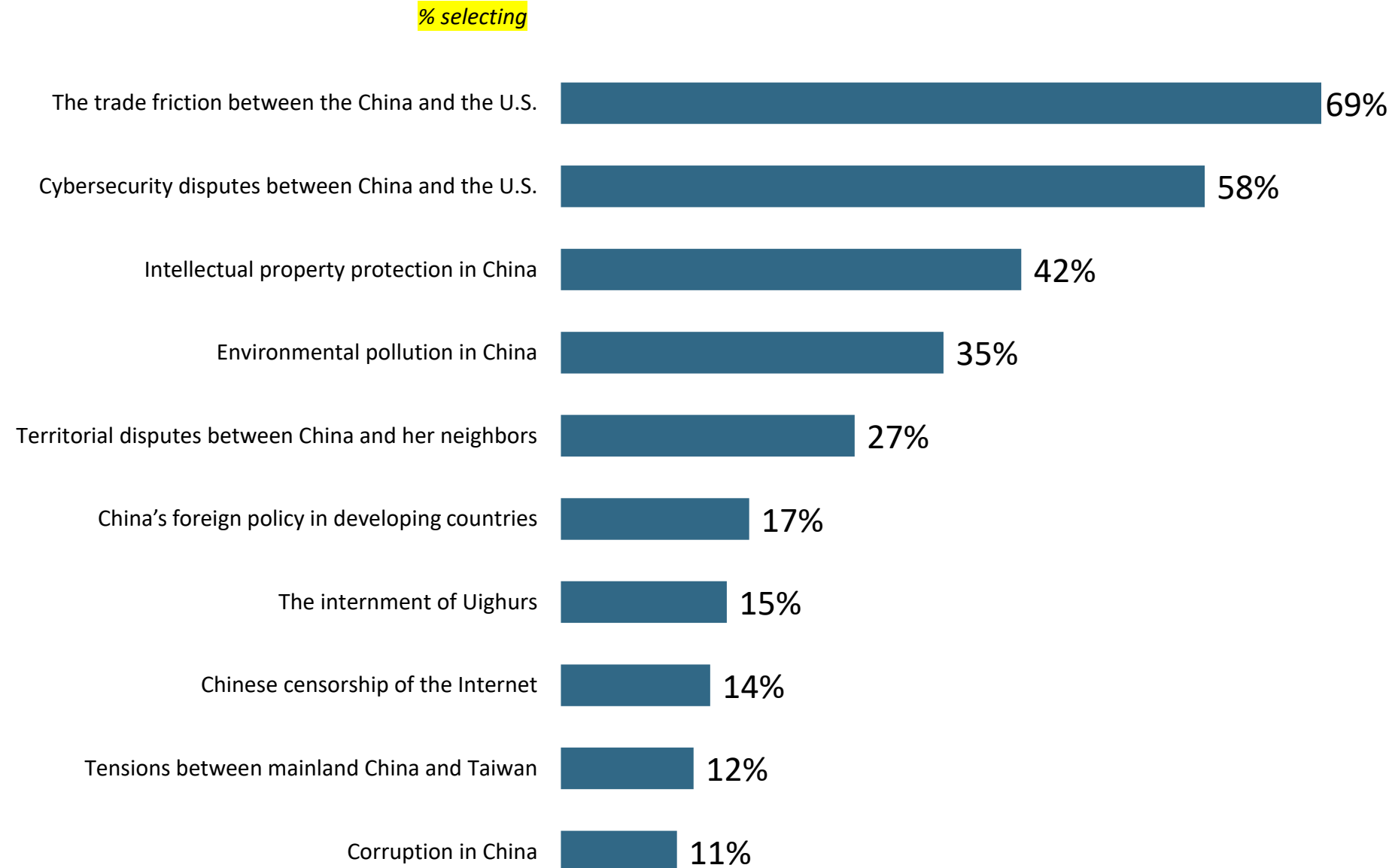
Question wording: Over the next ten years do you think the relationship between the U.S. and China will get better or worse or stay the same?



Concern with Issues about China

Majorities of these Experts identify trade friction and cybersecurity disputes among their greatest concerns with China.

Question wording: Of the following issues which THREE cause you the greatest concern?



Concern with Issues about China by Party

Democrats are less concerned than Republicans and Independents about trade, cybersecurity, and intellectual property but more concerned about the environment and territorial disputes.

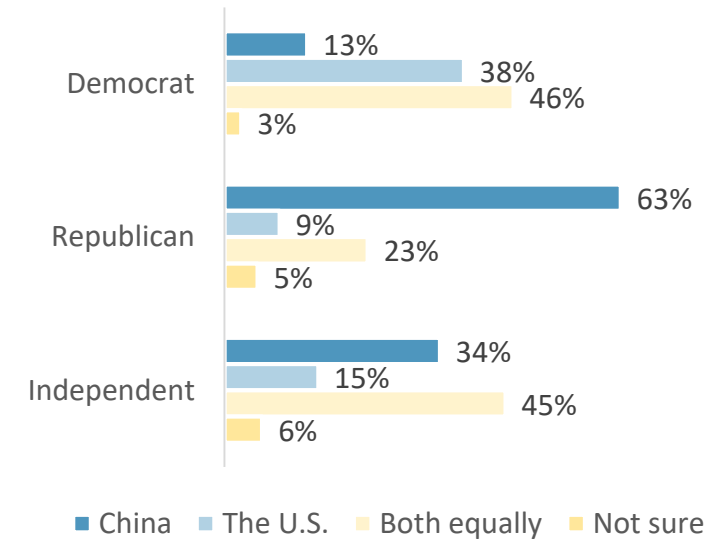
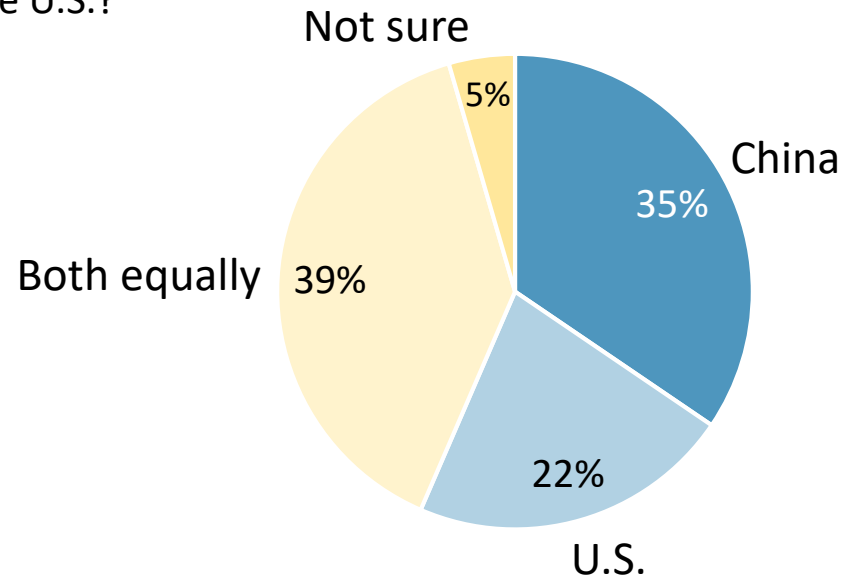
Question wording: Of the following issues which THREE cause you the greatest concern?

% Selecting	Total	Democrat	Republican	Independent
The trade friction between the China and the U.S.	69%	63%	70%	73%
Cybersecurity disputes between China and the U.S.	58%	51%	61%	63%
Intellectual property protection in China	42%	28%	47%	52%
Environmental pollution in China	35%	55%	21%	22%
Territorial disputes between China and her neighbors	27%	32%	23%	24%
China's foreign policy in developing countries	17%	18%	18%	15%
The internment of Uighurs	15%	20%	12%	12%
Chinese censorship of the Internet	14%	16%	11%	13%
Tensions between mainland China and Taiwan	12%	11%	21%	6%
Corruption in China	11%	5%	12%	15%

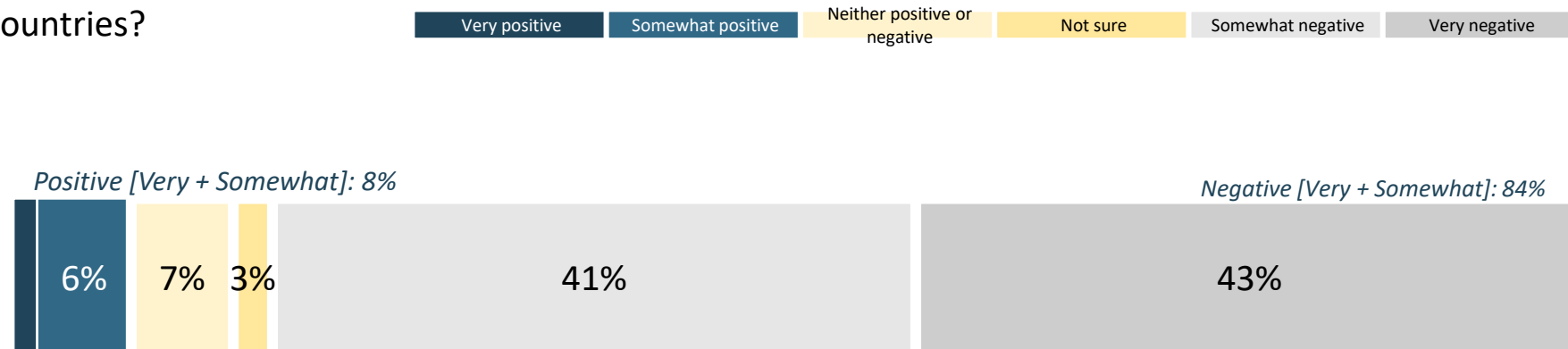
U.S.-China Trade Tensions

Republicans and Independents are much more likely than Democrats to hold China responsible for trade tensions.

Question wording: Who do you think is more responsible for the trade tensions between China and the U.S.?



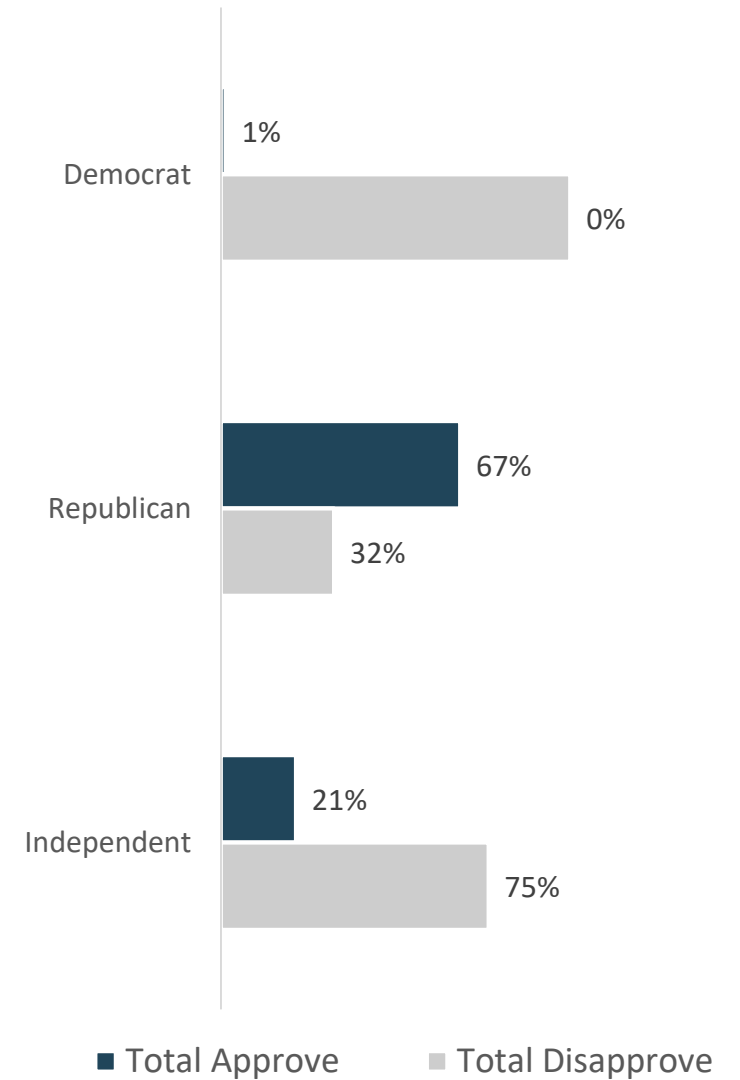
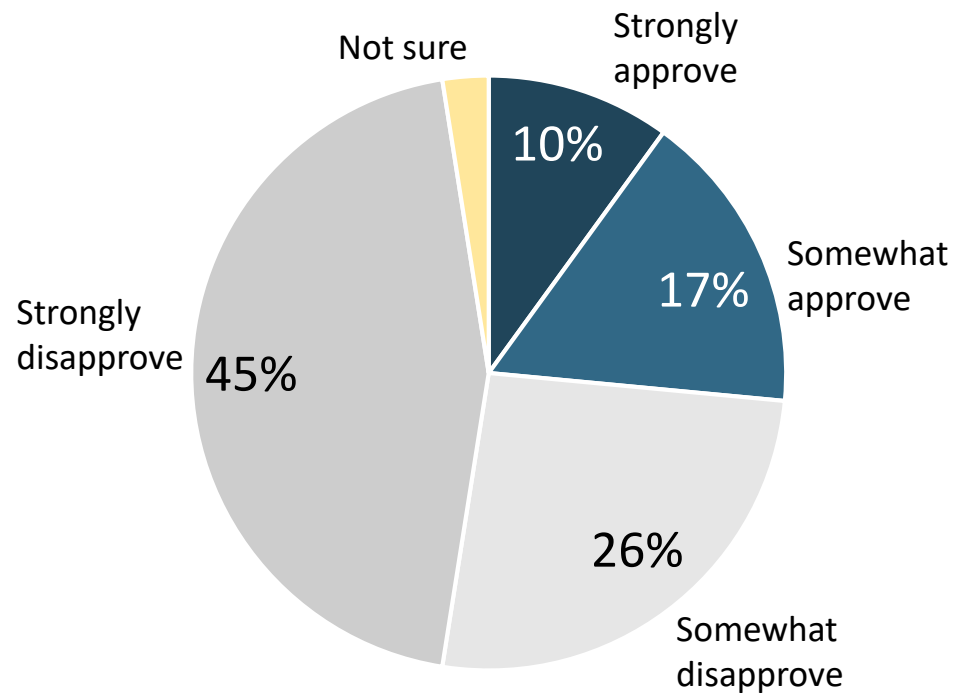
Question wording: Do you think the tariffs on imported goods imposed first by the US and then by China are having a positive or a negative effect on the trading relationship between the two countries?



Question wording: Do you approve or disapprove of the job that the Trump administration is doing in handling U.S. relations with China?

President Trump's Handling of U.S.-China Relations

Not surprisingly, Republicans rate Trump's handling of relations with China higher than Democrats and Independents but even one-third of Republicans rat him negatively.





Washington Experts M3 Message Testing

M3 Message Testing: Overview

- We tested 10 messages using Prime Group’s M3 methodology.
- M3 testing is a forced choice methodology requiring respondents to react to a series of screens, each with four messages.
- Respondents are asked to choose the strongest and the weakest message on each screen. Each message is repeated multiple times but always with a different set of “competing” messages.
- With this sample size (n=200) this methodology produces more than 8,000 unique data points, resulting in much greater precision and differentiation than traditional rating exercises which rely on each message being rated independently.



M3 Message Testing: Sample Screen

Below are four reasons that some people give for why it is important for the U.S. and China to find ways to cooperate with one another and avoid excessive competition and conflict. Please read the reasons carefully and then select:

- the single **STRONGEST** reason for the U.S. and China to cooperate; and
- the single **WEAKEST** reason for the U.S. and China to cooperate.

Each reason will repeat several times across the eight screens.

Strongest reason		Weakest reason
<input type="radio"/>	China's economic growth has come peacefully and should be encouraged through continued cooperation.	<input type="radio"/>
<input type="radio"/>	The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	<input type="radio"/>
<input type="radio"/>	Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	<input type="radio"/>
<input type="radio"/>	China is an extremely important market for U.S. goods and services and cooperating with China is the best way to get maximum access to this market.	<input type="radio"/>

(1 of 8)

M3 Message Testing: How to Interpret the Results

- **Preference Scores:**
 - Through the M3 process, respondents reveal their relative preferences for the each message.
 - These scores are NOT percentages.
 - Taken together the preference scores for all messages will always add to 100.
 - In effect respondents collectively distribute 100 points across the messages based on their relative appeal.
- **Reach Analysis:**
 - While the preference scores tell us the relative ranking of the messages for all respondents, a message's "reach" equals the percentage of respondents ranking that item as their favorite or second favorite message.
 - The "reach" for any two messages equals the percentage of respondents ranking either message as their favorite or second favorite.
 - Our algorithm examines the total reach for every possible message combination and determines the message packages that have the broadest appeal.
 - As an analogy, think of individual messages as items on a restaurant menu. Similar menu items such as two types of steak attract the same type of customer. Adding different types of menu items, such as seafood or vegetarian selections, broaden the overall appeal of the menu by "reaching" different customer types.



M3: Best Messages Supporting U.S.-China Cooperation

Tier 1

	Score
The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.	19.0
As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.	18.0
The U.S. and China should find ways to cooperate on common interests such as climate change, artificial Intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	17.4
China is an extremely important market for U.S. goods and services and cooperating with China is the best way to get maximum access to this market.	12.9
The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.	10.7
The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.	6.6
Cooperating with China is the best way to encourage the country to continue improving the environment and dealing with climate change.	5.4
The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.	5.2
Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	2.7
China's economic growth has come peacefully and should be encouraged through continued cooperation.	2.1

Tier 2

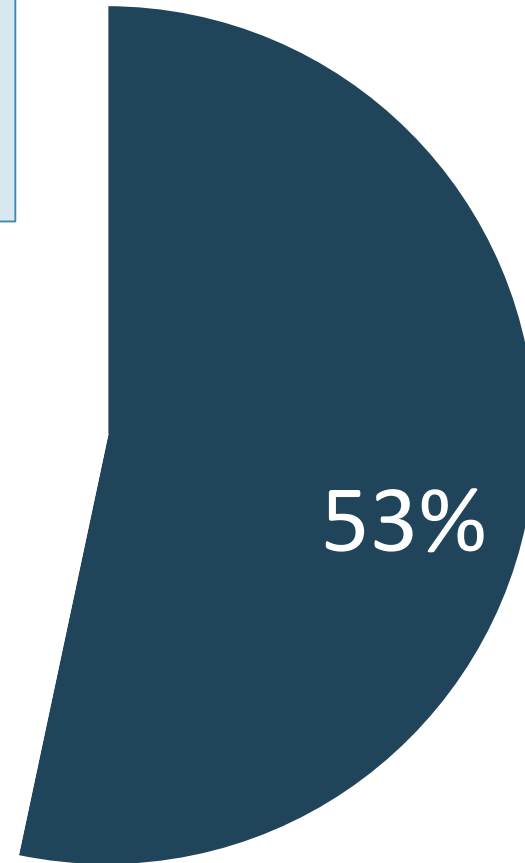
Tier 3

M3: Best Messages Supporting U.S.-China Cooperation cont.

	Score	Dem	Rep	Ind
The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.	19.0	18.0	19.0	20.2
As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.	18.0	15.5	20.1	18.9
The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.	17.4	19.7	15.8	16.1
China is an extremely important market for U.S. goods and services and cooperating with China is the best way to get maximum access to this market.	12.9	11.8	13.5	13.7
The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.	10.7	11.2	9.4	11.3
The best way to encourage China to continue its modernization of the economic system is through engagement and cooperation from the U.S.	6.6	6.2	7.8	6.0
Cooperating with China is the best way to encourage the country to continue improving the environment and dealing with climate change.	5.4	7.9	3.4	4.5
The U.S. and China have very different political systems, histories and cultures but it is more important for them to work together rather than to act as rivals.	5.2	5.1	5.4	5.2
Cooperation between China and the U.S. will provide an example to the rest of the world of how potential rival countries can seek collaboration rather than conflict.	2.7	2.9	2.9	2.2
China's economic growth has come peacefully and should be encouraged through continued cooperation.	2.1	1.7	2.7	2.0

M3 Reach Analysis: Best Messages Supporting U.S.- China Cooperation

53% of respondents
identified this message as
the strongest or second-
strongest message



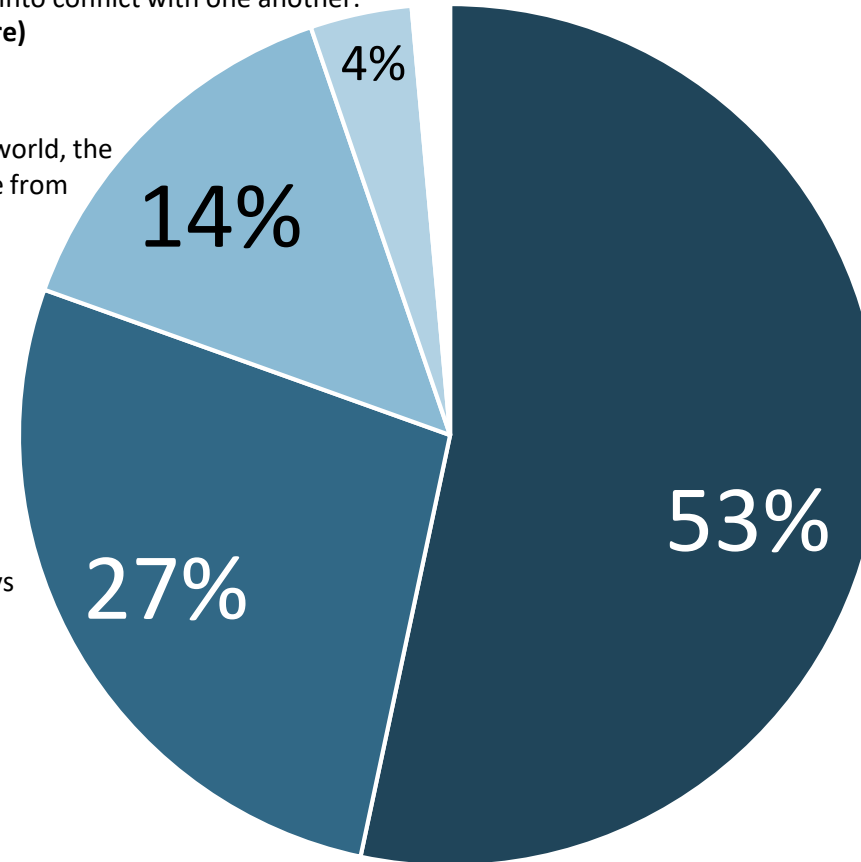
The more China and the U.S.
cooperate on economic, political,
and cultural issues, the less likely
they will be drawn into armed
conflict with each other.
(#1 message by preference score)

The optimal four message package reaches **98%** of respondents

The world is too globalized and interconnected to allow the two largest economies to come into conflict with one another.
(#5 message by preference score)

As the two largest economies in the world, the U.S. and China can both benefit more from cooperation than from conflict.
(#2 message by preference score)

The U.S. and China should find ways to cooperate on common interests such as climate change, artificial intelligence, anti-terrorism and preventing North Korea from expanding their nuclear capability.
(#3 message by preference score)



The more China and the U.S. cooperate on economic, political, and cultural issues, the less likely they will be drawn into armed conflict with each other.
(#1 message by preference score)

M3 Reach Analysis: Best Messages Supporting U.S.- China Cooperation

M3: Most Positive Actions China Has or Could Take

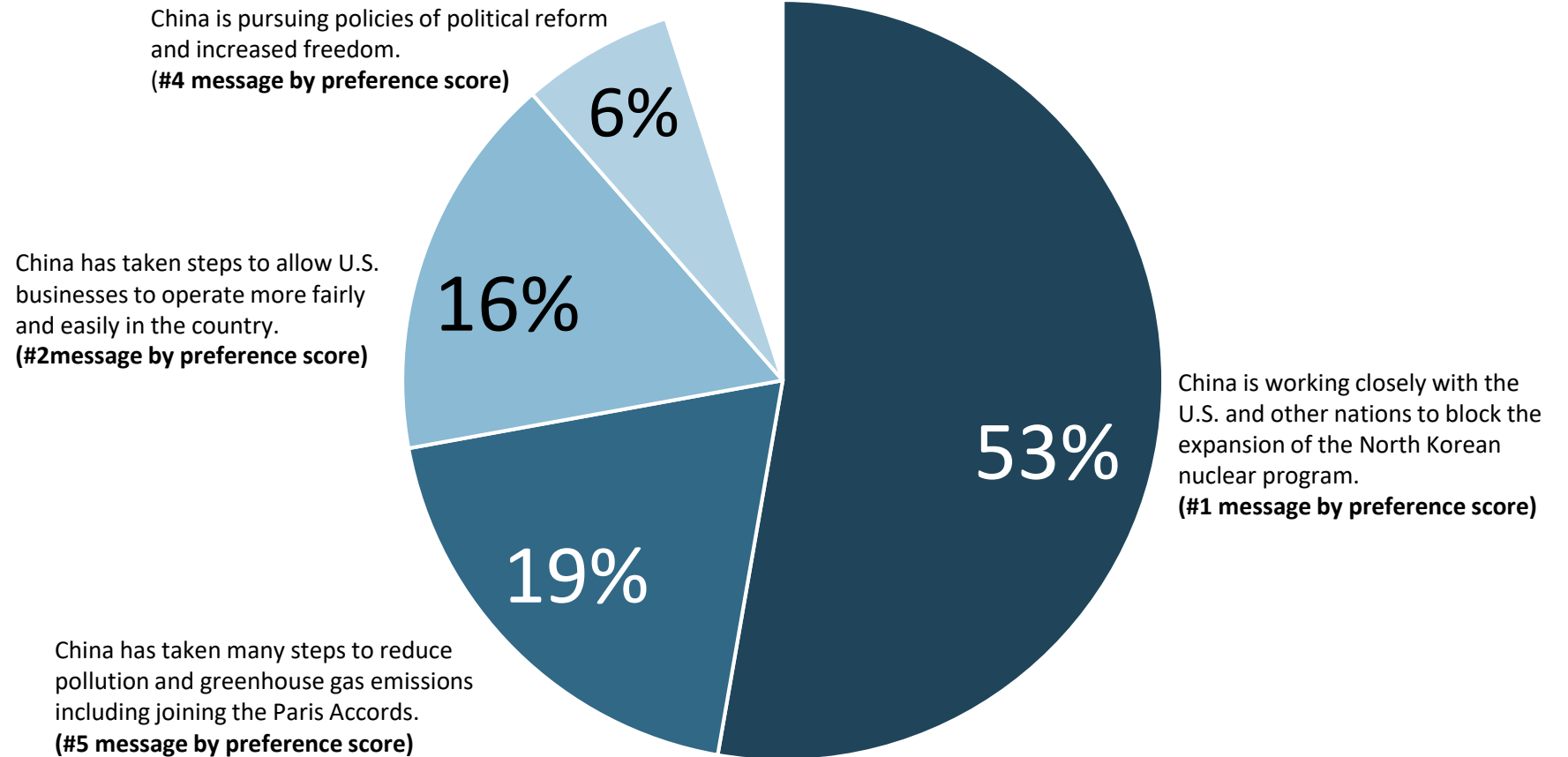
		Score
<i>Tier 1</i>	China is working closely with the U.S. and other nations to block the expansion of the North Korean nuclear program.	18.8
	China has taken steps to allow U.S. businesses to operate more fairly and easily in the country.	13.3
<i>Tier 2</i>	China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.	12.1
	China is pursuing policies of political reform and increased freedom.	11.7
	China has taken many steps to reduce pollution and greenhouse gas emissions including joining the Paris Accords.	10.5
	China has lifted hundreds of millions of people out of poverty and created a powerful consumer class who can buy more American products and services.	9.2
<i>Tier 3</i>	China has taken steps to prevent international cyber hacking.	8.4
	China is investing heavily in science and technology, which will lead to new breakthroughs that benefit the entire world.	6.5
	China and the U.S. have continued the enhancement of military cooperation and information sharing with each other.	6.4
	China is pursuing an anti-corruption movement that has already brought many public officials to justice.	3.2

M3: Most Positive Actions China Has or Could Take

cont.

	Score	Dem	Rep	Ind
China is working closely with the U.S. and other nations to block the expansion of the North Korean nuclear program.	18.8	16.4	21.0	19.7
China has taken steps to allow U.S. businesses to operate more fairly and easily in the country.	13.3	8.0	18.3	15.0
China has pursued cooperation with the U.S. on political, economic, environmental and cultural issues.	12.1	13.6	9.9	12.1
China is pursuing policies of political reform and increased freedom.	11.7	13.3	10.3	11.0
China has taken many steps to reduce pollution and greenhouse gas emissions including joining the Paris Accords.	10.5	16.5	4.7	8.6
China has lifted hundreds of millions of people out of poverty and created a powerful consumer class who can buy more American products and services.	9.2	8.6	10.3	9.0
China has taken steps to prevent international cyber hacking.	8.4	7.3	9.3	8.7
China is investing heavily in science and technology, which will lead to new breakthroughs that benefit the entire world.	6.5	6.9	5.7	6.8
China and the U.S. have continued the enhancement of military cooperation and information sharing with each other.	6.4	5.7	7.7	6.0
China is pursuing an anti-corruption movement that has already brought many public officials to justice.	3.2	3.6	2.7	3.1

The optimal four action package reaches **94% of respondents**



M3 Reach Analysis: Most Positive Actions China Has or Could Take

Thank You.

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