The State of Trust in the US-German Partnership:
A Transatlantic Survey
Methodology

**Methodology:** 15-minute online survey

**Markets:** US and Germany

**Fieldwork:** May 2022

**Sample definition and size:**

- Nationally representative samples of the general population in terms of age (18+), gender and location in the US and Germany
- Total base size n=4,003 respondents (n=2,002 in the US and n=2,001 in Germany)
Content

1. The US and Germany's influence on the world
2. State of trust in each other's institutions
3. In partnership we trust
4. Paving the way for the future
The US and Germany’s Influence on the world
Americans are confident in their status as a global leader. Germans feel they are one of several with moderate influence.

Extent to which Americans view the US as a global leader:
- 52% see the US as an elite leader with strong influence on the rest of the world.
- 34% see the US as one of several countries with moderate influence.
- 6% see the US with only slight influence.
- 7% see the US as not seen as a leader by other countries.

Extent to which Germans view Germany as a global leader:
- 63% see Germany as an elite leader with strong influence on the rest of the world.
- 18% see Germany as one of several countries with moderate influence.
- 15% see Germany with only slight influence.
- 4% see Germany as not seen as a leader by other countries.

Q1: To what extent do you see your country as a global leader? Total respondents, US n=2,002, Germany n=2,001
International cooperation is key to be seen as a global leader.

Q2. How important are international partnerships/cooperation for a country in order to be seen as a global leader? Five-point scale. Top 2. Total respondents, US n=2,002, Germany n=2,001

88% % agree
International cooperation is important to be seen as a global leader

89%
Germans more likely to believe international cooperation is critical to address pressing issues.

<table>
<thead>
<tr>
<th>Issue</th>
<th>% of State/federal governments</th>
<th>% of International cooperation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combatting state aggression (e.g., from Russia)</td>
<td>36</td>
<td>49</td>
</tr>
<tr>
<td>Climate change</td>
<td>36</td>
<td>46</td>
</tr>
<tr>
<td>Protecting human rights</td>
<td>46</td>
<td>39</td>
</tr>
<tr>
<td>Trade and economics</td>
<td>40</td>
<td>44</td>
</tr>
<tr>
<td>Reducing fossil fuel reliance</td>
<td>40</td>
<td>41</td>
</tr>
<tr>
<td>COVID-19 response</td>
<td>46</td>
<td>37</td>
</tr>
<tr>
<td>Combatting misinformation</td>
<td>47</td>
<td>29</td>
</tr>
<tr>
<td>Reducing inequalities</td>
<td>50</td>
<td>27</td>
</tr>
</tbody>
</table>

Q3. When thinking of the following issues, do you believe they are better addressed through international cooperation or your state or federal government? 7-point scale. State/federal government codes 1-3. International cooperation codes 5-7. Total respondents, US n=2002, Germany n=2,001
Americans think some specific issues are better addressed by domestic authorities.

Q3. When thinking of the following issues, do you believe they are better addressed through international cooperation or your state or federal government? 7-point scale. State/federal government codes 1-3. International cooperation codes 5-7. Total respondents, US n=2002.
State of trust in each Other’s institutions
Americans are generally more trusting of German institutions, but Trust in each other’s government is equal.

% of trust in institutions of the other country

- Americans evaluating German institutions
  - Business: 58% (51%)
  - Government: 55% (54%)
  - NGOs: 55% (51%)
  - Media: Less than 53% (44%)

- Germans evaluating American institutions
  - Business: 51% (58%)
  - Government: 54% (55%)
  - NGOs: 51% (55%)
  - Media: 44% (53%)

Q9: How much do you trust the following [American/German] institutions to do what is right? 7-point scale. Top 4. Total respondents, US n=2,002, Germany n=2,001
Americans have more positive perceptions of German businesses than vice versa.

**Americans evaluate German businesses - % who agree**

- They are competent: 76%
- They are reliable: 73%
- They are trying hard to have a positive impact on society: 70%
- They keep their promises: 69%
- They are fair in their dealings: 69%
- They are honest: 67%
- They are transparent: 65%

**Germans evaluate American businesses - % who agree**

- They are competent: 73%
- They are reliable: 65%
- They are trying hard to have a positive impact on society: 61%
- They keep their promises: 60%
- They are fair in their dealings: 54%
- They are honest: 51%
- They are trying hard to have a positive impact on the environment: 51%
- They are transparent: 50%

Germans acknowledge the competence and reliability of American businesses but doubt their transparency, honesty and commitment to address environmental issues.

Q13. Now, thinking about [AMERICAN/GERMAN] companies in general, to what extent do you agree or disagree with the following statements? Total respondents, US n=2,002, Germany n=2,001
Views of businesses on both sides have remained largely unchanged.

<table>
<thead>
<tr>
<th>Americans evaluate German businesses over time</th>
<th>% who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>They are competent</td>
<td>41% (50%)</td>
</tr>
<tr>
<td>They are reliable</td>
<td>40% (50%)</td>
</tr>
<tr>
<td>They are trying hard to have a positive impact on the environment</td>
<td>46% (45%)</td>
</tr>
<tr>
<td>They are trying hard to have a positive impact on society</td>
<td>46% (44%)</td>
</tr>
<tr>
<td>They keep their promises</td>
<td>39% (51%)</td>
</tr>
<tr>
<td>They are fair in their dealings</td>
<td>38% (50%)</td>
</tr>
<tr>
<td>They are honest</td>
<td>40% (49%)</td>
</tr>
<tr>
<td>They are transparent</td>
<td>37% (51%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Germans evaluate American businesses over time</th>
<th>% who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>They are competent</td>
<td>33% (59%)</td>
</tr>
<tr>
<td>They are reliable</td>
<td>32% (59%)</td>
</tr>
<tr>
<td>They are trying hard to have a positive impact on society</td>
<td>36% (55%)</td>
</tr>
<tr>
<td>They keep their promises</td>
<td>30% (61%)</td>
</tr>
<tr>
<td>They are fair in their dealings</td>
<td>28% (62%)</td>
</tr>
<tr>
<td>They are honest</td>
<td>27% (62%)</td>
</tr>
<tr>
<td>They are trying hard to have a positive impact on the environment</td>
<td>35% (54%)</td>
</tr>
<tr>
<td>They are transparent</td>
<td>26% (63%)</td>
</tr>
</tbody>
</table>

Q14. And would you say [AMERICAN / GERMAN] businesses’ performance has gotten better or worse recently? Total respondents, US n=2,002, Germany n=2,001
Trust in business is consistently driven on both sides by quality, innovation and historical relationships.

Americans’ top 3 reasons to trust German businesses

- The quality of their product and services: 86%
- Their ability to innovate: 84%
- Historical trade relationships between the two countries: 84%

Germans’ top 3 reasons to trust American businesses

- The quality of their product and services: 86%
- Their ability to innovate: 85%
- Historical trade relationships between the two countries: 83%

Q15a. Thinking about [AMERICAN/GERMAN] companies in general, to what extent do you agree or disagree with the following statements? 7-point scale. Top 3. percentage trusting businesses. All respondents who trust [AMERICAN/GERMAN] business.
Distrust in business is driven by differing views of free trade and regulation.

**As asked among those who distrust the other countries’ businesses**

<table>
<thead>
<tr>
<th>Americans’ top 3 reasons to distrust German businesses</th>
<th>Germans’ top 3 reasons to distrust American businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t trust them because - % who agree</td>
<td>I don’t trust them because - % who agree</td>
</tr>
<tr>
<td>Historical trade relationships between the two countries</td>
<td>Different views on free trade 54%</td>
</tr>
<tr>
<td>Different views on free trade</td>
<td>Economic and financial power 54%</td>
</tr>
<tr>
<td>Poor quality of their communication and disclosures</td>
<td>Don’t share common business practices and regulations 49%</td>
</tr>
</tbody>
</table>
Americans feel positive about the German government. Germans are skeptical of US honesty and transparency.

**Americans evaluate German government - % who agree**

- It is trying hard to have a positive impact on the environment: 75%
- It is competent: 74%
- It tries to have a positive impact on society: 72%
- It is fair in its dealings: 70%
- It is reliable: 69%
- It is honest: 68%
- It keeps its promises: 68%
- It is transparent: 63%

**Germans evaluate American government - % who agree**

- It is competent: 69%
- It tries to have a positive impact on society: 66%
- It is reliable: 63%
- It keeps its promises: 59%
- It is fair in its dealings: 58%
- It is trying hard to have a positive impact on the environment: 54%
- It is honest: 53%
- It is transparent: 49%

Americans believe the German government is working hard to have a positive impact on the environment and society, that it is competent and fair in its dealings.

Germans acknowledge the competence of the US government, but doubt its transparency, honesty and commitment when it comes to addressing environmental issues.

Q10: Thinking about the [AMERICAN/GERMAN] government, to what extent do you agree or disagree with the following statements? Total respondents, US n=2,002. Germany n=2,001
Views of German government have remained largely unchanged. US government increasingly perceived as competent.

<table>
<thead>
<tr>
<th>Americans evaluate German government over time</th>
<th>Germans evaluate American government over time</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is trying hard to have a positive impact on the environment</td>
<td>It is competent</td>
</tr>
<tr>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>42%</td>
<td>37%</td>
</tr>
<tr>
<td>It is competent</td>
<td>It tries to have a positive impact on society</td>
</tr>
<tr>
<td>41%</td>
<td>51%</td>
</tr>
<tr>
<td>48%</td>
<td>38%</td>
</tr>
<tr>
<td>It tries to have a positive impact on society</td>
<td>It is reliable</td>
</tr>
<tr>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>43%</td>
<td>40%</td>
</tr>
<tr>
<td>It is fair in their dealings</td>
<td>It keeps its promises</td>
</tr>
<tr>
<td>41%</td>
<td>46%</td>
</tr>
<tr>
<td>50%</td>
<td>42%</td>
</tr>
<tr>
<td>It is reliable</td>
<td>It is fair in their dealings</td>
</tr>
<tr>
<td>41%</td>
<td>44%</td>
</tr>
<tr>
<td>48%</td>
<td>42%</td>
</tr>
<tr>
<td>It is honest</td>
<td>It is trying hard to have a positive impact on the environment</td>
</tr>
<tr>
<td>39%</td>
<td>47%</td>
</tr>
<tr>
<td>49%</td>
<td>40%</td>
</tr>
<tr>
<td>It keeps its promises</td>
<td>It is honest</td>
</tr>
<tr>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td>50%</td>
<td>43%</td>
</tr>
<tr>
<td>It is transparent</td>
<td>It is transparent</td>
</tr>
<tr>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>51%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Perceptions of the German government remained largely unchanged, although improvements are seen when it comes to societal and environmental impact.

Although perceptions of competence and reliability of the US government have improved for 1 in 2 Germans, transparency and honesty remained relatively unchanged.

Q11: And would you say the performance of the [AMERICAN/GERMAN] government has gotten better or worse recently? Total respondents, US n=2,002, Germany n=2,001
Common values, interests, challenges and democratic views are top Trust factors in both US and German governments.

Asked among those who trust the other countries’ government

**Americans’ top 3 reasons to trust the German government**
- Share common interests and challenges: 89%
- Share common views of democracy: 88%
- Share common values: 86%

**Germans’ top 3 reasons to trust the American government**
- Share common interests and challenges: 87%
- Share common views of democracy: 86%
- Share common values: 86%

Q12a. Thinking about the [AMERICAN/GERMAN] government, to what extent do you agree or disagree with the following statements? 7-point scale. Top 3, percentage trusting government. All respondents who trust [AMERICAN/GERMAN] government.
Distrust in governments driven by political misalignment and inability to regulate.

As asked among those who distrust the other countries’ government

<table>
<thead>
<tr>
<th>Americans’ top 3 reasons to distrust the German government</th>
<th>I don’t trust it because - % who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am not aligned with its political views</td>
<td>50%</td>
</tr>
<tr>
<td>We don’t share common interests and challenges</td>
<td>48%</td>
</tr>
<tr>
<td>Historical relationship</td>
<td>47%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Germans’ top 3 reasons to distrust the American government</th>
<th>I don’t trust it because - % who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not able to regulate fairly and transparently</td>
<td>61%</td>
</tr>
<tr>
<td>I am not aligned with its political views</td>
<td>55%</td>
</tr>
<tr>
<td>Don’t share common views of democracy</td>
<td>53%</td>
</tr>
</tbody>
</table>

Q12b. Thinking about the [AMERICAN/GERMAN] government, to what extent do you agree or disagree with the following statements? 7-point scale. Top 3. percentage distrusting government. All respondents who distrust [AMERICAN/GERMAN] government.
In partnership
We trust
Strong Trust in the partnership and in each other's people and country.

% who trust

63% 66% 68% 63% 69% 64%

The German-American partnership  The people of Germany/America  Germany/America as a country

Americans evaluating the partnership / Germans / Germany  Germans evaluating the partnership / Americans / US

Q9: How much do you trust the following [AMERICAN/GERMAN] institutions to do what is right? Q18: To what extent do you trust the German-American partnership to do what is right? 7-point scale. Top 4. Total respondents, US n=2,002, Germany n=2,001
Men, older, and more affluent groups more trusting of the partnership. No group is distrusting.

% who trust

63% of Americans trust the partnership

66% of Germans trust the partnership

Q18: To what extent do you trust the German-American partnership to do what is right? Top 4. Total respondents, US n=2,002, Germany n=2,001
Response to the war in Ukraine has increased trust in both the US and Germany, as countries.

% of Americans saying the specific event made them more trusting of Germany, as a country

- German government response to the war in Ukraine: 60%
- Germany significantly increasing its defense spending in 2022: 58%
- German management of the Covid-19 pandemic: 58%
- Germany's leadership addressing climate change: 57%

% of Germans saying the specific event made them more trusting of the US, as a country

- US government response to the war in Ukraine: 62%
- President Biden saying that "America is back" in 2021: 57%
- American businesses’ response to the war in Ukraine: 57%
- American businesses’ engagement on climate: 41%

Q16a/b: To what extent have the following events made you more or less trusting of [GERMANY/AMERICA] as a country? 7-point scale. More trusting top 3. Total respondents, US n=2,002, Germany n=2,001
Engagement in Ukraine and on climate has built trust in the US as a country vs. other recent events.

Difference in specific events making Germans more or less trusting in the US

<table>
<thead>
<tr>
<th>Trust lowering events</th>
<th>Trust building events</th>
</tr>
</thead>
<tbody>
<tr>
<td>US government response to the war in Ukraine</td>
<td>45</td>
</tr>
<tr>
<td>President Biden saying that “America is back” at the Munich Security Conference in 2021</td>
<td>42</td>
</tr>
<tr>
<td>American businesses’ engagement on climate</td>
<td>29</td>
</tr>
<tr>
<td>American businesses’ response to the war in Ukraine</td>
<td>23</td>
</tr>
<tr>
<td>US Supreme Court may overturn Roe vs. Wade abortion law</td>
<td>6</td>
</tr>
<tr>
<td>Attack on the US Capitol in 2021</td>
<td>13</td>
</tr>
<tr>
<td>Media misinformation</td>
<td>13</td>
</tr>
<tr>
<td>Wealthy elite engaging in tax avoidance</td>
<td>18</td>
</tr>
</tbody>
</table>

Q16a/b: To what extent have the following events made you more or less trusting of the USA as a country? 7-point scale. Difference more trusting top 3 box minus less trusting bottom 3 box. Total respondents, Germany n=2,001
The partnership is strong and crucial to the world's stability.

- **7 in 10** Agree the US-German partnership is strong
- **3 in 4** Agree a strong US-German partnership is crucial for the world's stability
- **3 in 4** Agree the US-German partnership is indispensable now more than ever
- **2 in 3** Agree the US and Germany are complementary

Q5: How much do you agree or disagree with the following statements about the partnership between the US and Germany? Total respondents, US n=2,002, Germany n=2,001

- **59%** Agree - New governments, led by Joseph Biden in the US and Olaf Scholz in Germany, have revitalized the strength of the US-German partnership
Broad alignment that partnership foundation is rooted in military alliance and trade.

<table>
<thead>
<tr>
<th>% of Americans who agree the partnership is based on...</th>
<th>% of Germans who agree the partnership is based on...</th>
</tr>
</thead>
<tbody>
<tr>
<td>74% Military and defense alliance</td>
<td>76%</td>
</tr>
<tr>
<td>74% Trade and commerce</td>
<td>79%</td>
</tr>
<tr>
<td>72% Common challenges</td>
<td>76%</td>
</tr>
<tr>
<td>71% Common interests</td>
<td>73%</td>
</tr>
<tr>
<td>71% Science and technology development</td>
<td>72%</td>
</tr>
<tr>
<td>68% Common values and beliefs</td>
<td>70%</td>
</tr>
<tr>
<td>66% Cultural exchanges</td>
<td>60%</td>
</tr>
</tbody>
</table>

Q7. Thinking about the partnership between the US and Germany, which of these do you think best describe what it is based on? 7-point scale. Top 3. Total respondents, US n=2,002, Germany n=2,001
Majority say the partnership is equal, with shared strengths in innovation, diplomacy and economic power.

6 in 10 say the partnership is equal

66% US
63% Germany

AMERICAN STRENGTH
65% of Germans say military capabilities are an American strength and a German weakness

GERMAN STRENGTH
Only 23% of Americans think actions to address climate change are an American strength and a German weakness.

More than 50% think BOTH COUNTRIES STRONG IN:
• Innovation in science and technology
• Manufacturing infrastructure
• Diplomacy on the world stage
• Economic power

36% of Germans think it is a German strength and an American weakness.

Q20. How do you view the strengths and weaknesses in the relationship? Q21: To what extent do you agree or disagree with the following statements about the transatlantic partnership between the US and Germany? Total respondents, US n=2,002, Germany n=2,001
One in two believe the best days of the partnership are ahead, younger generations are most optimistic.

<table>
<thead>
<tr>
<th>% who say its best days are behind</th>
<th>% who say its best days are ahead</th>
</tr>
</thead>
<tbody>
<tr>
<td>![American Flag] 19%</td>
<td>![German Flag] 31%</td>
</tr>
<tr>
<td>27% Don't know</td>
<td>55%</td>
</tr>
<tr>
<td>46%</td>
<td>23% Don't know</td>
</tr>
</tbody>
</table>

Younger generations are more likely to agree that the partnership’s best days are ahead.

<table>
<thead>
<tr>
<th>Generation</th>
<th>US 2002</th>
<th>Germany 2001</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z (18-26 yo)</td>
<td>54%</td>
<td>66%</td>
</tr>
<tr>
<td>Millennials (27-41 yo)</td>
<td>67%</td>
<td>51%</td>
</tr>
<tr>
<td>Gen X (42-55 yo)</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Boomers + (56+)</td>
<td>46%</td>
<td>41%</td>
</tr>
</tbody>
</table>

Q6. Thinking of the German-American partnership, would you say that the partnership’s best days are... Total respondents, US n=2,002, Germany n=2,001
Majority in both countries feel positively about the partnership.

Q8: Which of the below describe how you feel about the German-American partnership? Total respondents, US n=2,002, Germany n=2,001
Paving the way
For the future
Both countries largely aligned on current priorities. Economic growth more of a priority in the US.

Q23: In your opinion, what are currently the top 3 priorities of the transatlantic partnership between the US and Germany? Total respondents. US n=2,002, Germany n=2,001

Top current priorities of the US–German partnership according to Americans

- Economic growth and job creation in both countries: 37%
- Strengthening democracies around the world: 33%
- Addressing climate change: 31%
- Pooling together military resources: 29%
- Ensuring human rights: 25%
- Sharing natural resources: 21%

Top current priorities of the US–German partnership according to Germans

- Pooling together military resources: 39%
- Addressing climate change: 39%
- Strengthening democracies around the world: 33%
- Economic growth and job creation in both countries: 29%
- Ensuring human rights: 27%
- Fighting inequalities: 20%
Future priorities of the partnership are similar. Climate change becoming more urgent for Germans.

Top future priorities of the US–German partnership according to Americans:
- Economic growth and job creation in both countries: 42%
- Strengthening democracies around the world: 36%
- Addressing climate change: 33%
- Ensuring human rights: 30%
- Sharing natural resources: 25%
- Pooling together military resources: 23%

Top future priorities of the US–German partnership according to Germans:
- Addressing climate change: 49%
- Strengthening democracies around the world: 39%
- Ensuring human rights: 36%
- Economic growth and job creation in both countries: 29%
- Fighting inequalities: 24%
- Pooling together military resources: 23%

Q22: In your opinion, what should be the top 3 priorities of the transatlantic partnership between the US and Germany? Total respondents, US n=2,002, Germany n=2,001
Three in four believe the partnership has global benefits and not only a domestic focus.

Q19. What should the primary purpose of the German-American partnership be? Total respondents, US n=2,002, Germany n=2,001

- 47% Equal focus on both domestic and global improvements
- 31% Improving the global situation
- 22% Improving both countries domestically

% who agree with each purpose for the German-American partnership

Q19. What should the primary purpose of the German-American partnership be? Total respondents, US n=2,002, Germany n=2,001
Governments and businesses on both sides should drive the transatlantic partnership.

Q21. To what extent do you agree or disagree with the following statements about the transatlantic partnership between the US and Germany? Total respondents, US n=2,002. Germany n=2,001
Transparency and long-term outlook are key to building trust.

Top priorities for business on both sides

- **8 in 10**
  - Be more transparent in how they deal with each other
  - Business relationships should not be dependent on the governments in place
- **3 in 4**
  - Align long-term goals with short-term action plans

Top priorities for governments on both sides

- **8 in 10**
  - Be more transparent in how they deal with each other
  - Should work together to strengthen military defense and economic security in democracies
  - Relationships should not be dependent on the governments in place
- **3 in 4**

Q24. To what extent do you agree or disagree with the following about the German and American governments? Q25. To what extent do you agree or disagree with the following about German and American businesses? 7-point scale. Top 3 agree. Total respondents, US n=2,002, Germany n=2,001.
Executive Summary

1 The partnership is strong

- Trust in the partnership is high. The vast majority in both countries think the partnership is needed now more than ever and plays a crucial role for the world's stability.
- Responses to the war in Ukraine and actions of relatively new administrations contributed to building trust in the partnership.
- Half of Americans and Germans believe its best days are ahead, particularly younger generations.

2 Differing views on influence on the world and trust

- Americans see their country as a global leader with strong influence, and an ability to address some key issues domestically.
- They largely trust German institutions and see government and business as competent and reliable. Government actions on the environment are acknowledged.

- Germans think they are one of several countries with moderate influence, heavily relying on international partnerships to address issues.
- American businesses and government are largely trusted, seen as competent and reliable, but Germans are skeptical of their honesty, transparency and commitment to the environment.

3 Room for improvement and alignment

- Although both countries are largely aligned on the priorities of the partnership, economic growth and climate change need to be addressed to satisfy both parties.
- Business and governments are expected to lead the partnership with transparency, mutual understanding and focus on long-term goals being key to build trust.
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