



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)

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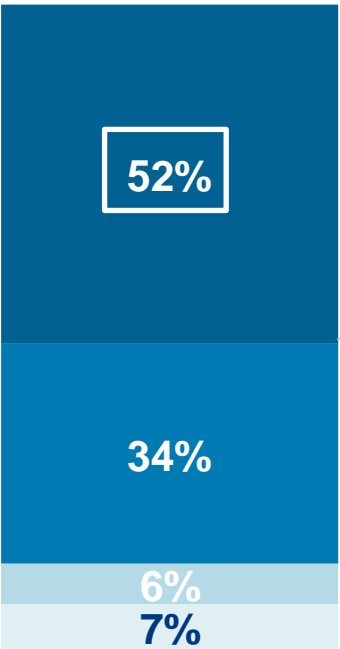
Paving the way for the future

01

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



73% among high-income Americans vs. 43% low-income Americans



Extent to which Germans view Germany as a global leader

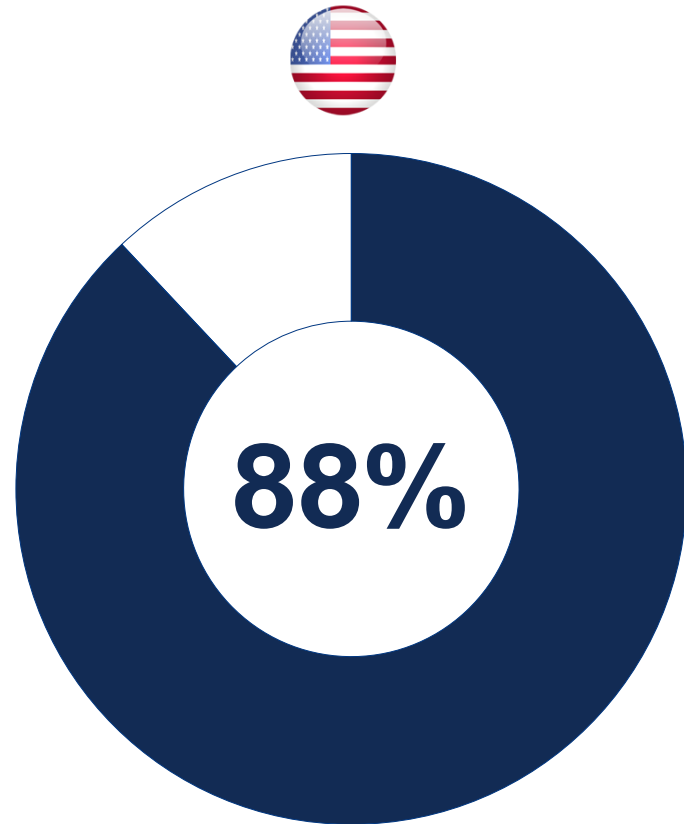


35% among German Gen Z's

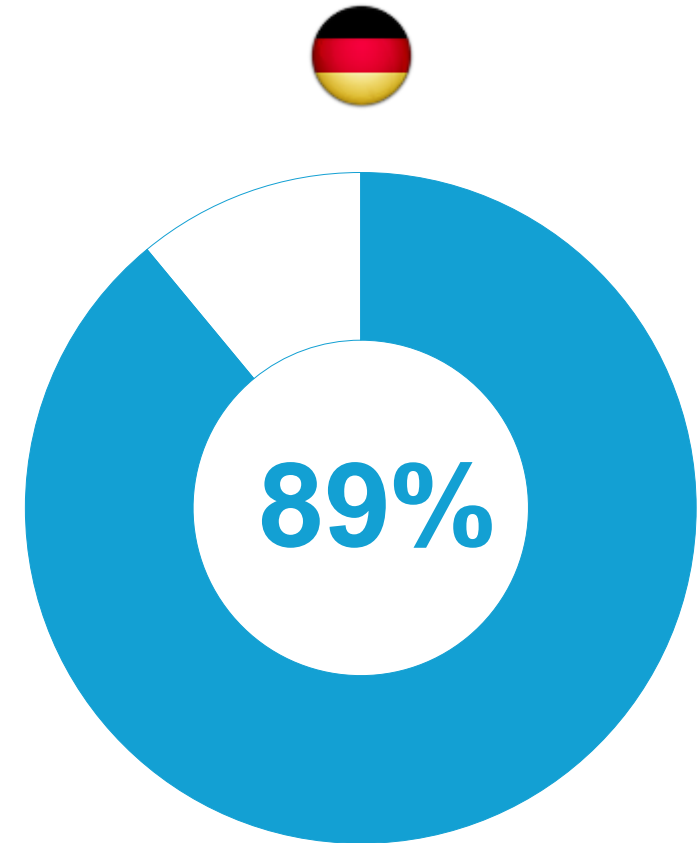


-  We are an **elite leader with strong influence** on the rest of the world
-  We are **one of several countries with moderate influence** on the rest of the world
-  We have **only slight influence** on the rest of the world
-  We are **not seen as a leader** by other countries

International cooperation is key to be seen as a global leader.



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

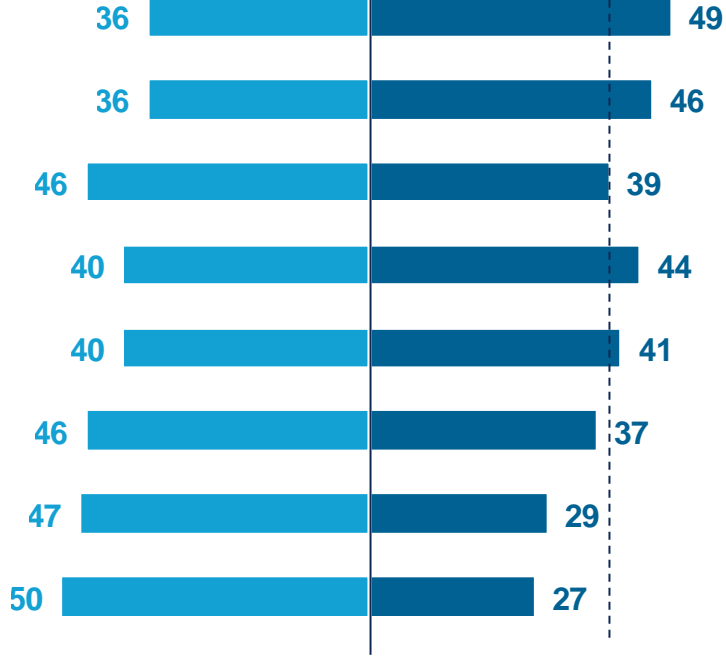


Germans more likely to believe international cooperation is critical to address pressing issues.



% who believe each issue is better addressed by...

State/federal governments *International cooperation*

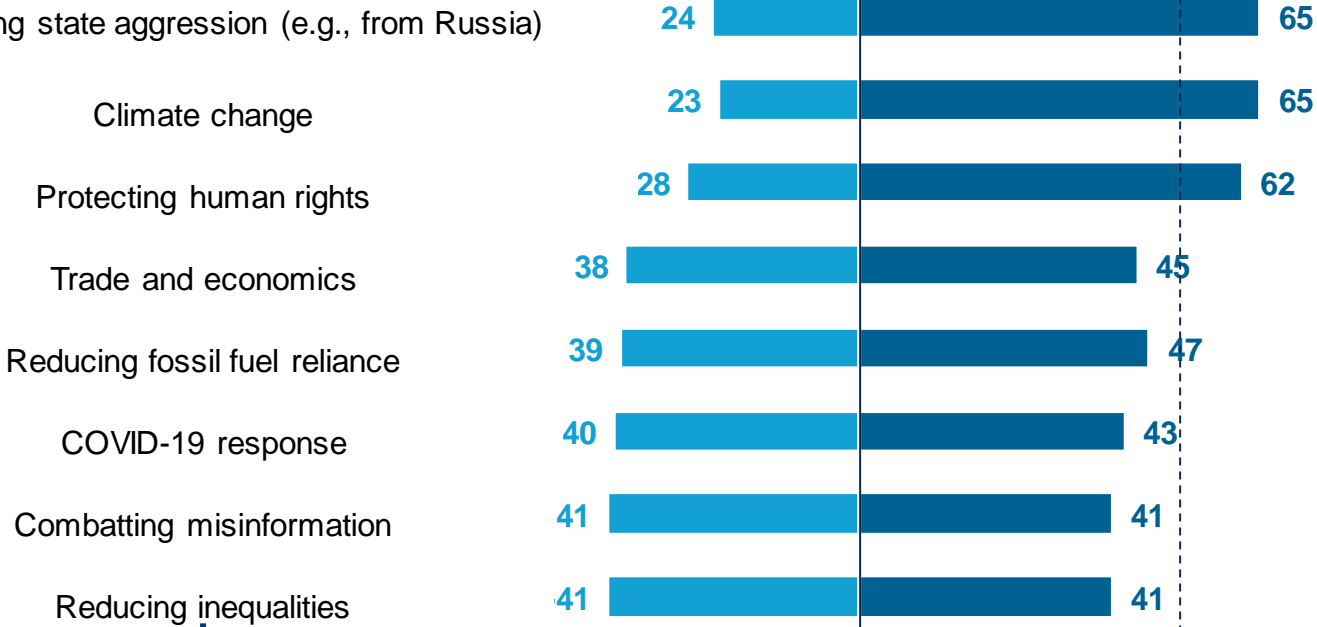


39%
(average)



% who believe each issue is better addressed by...

State/federal governments *International cooperation*



51%
(average)

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

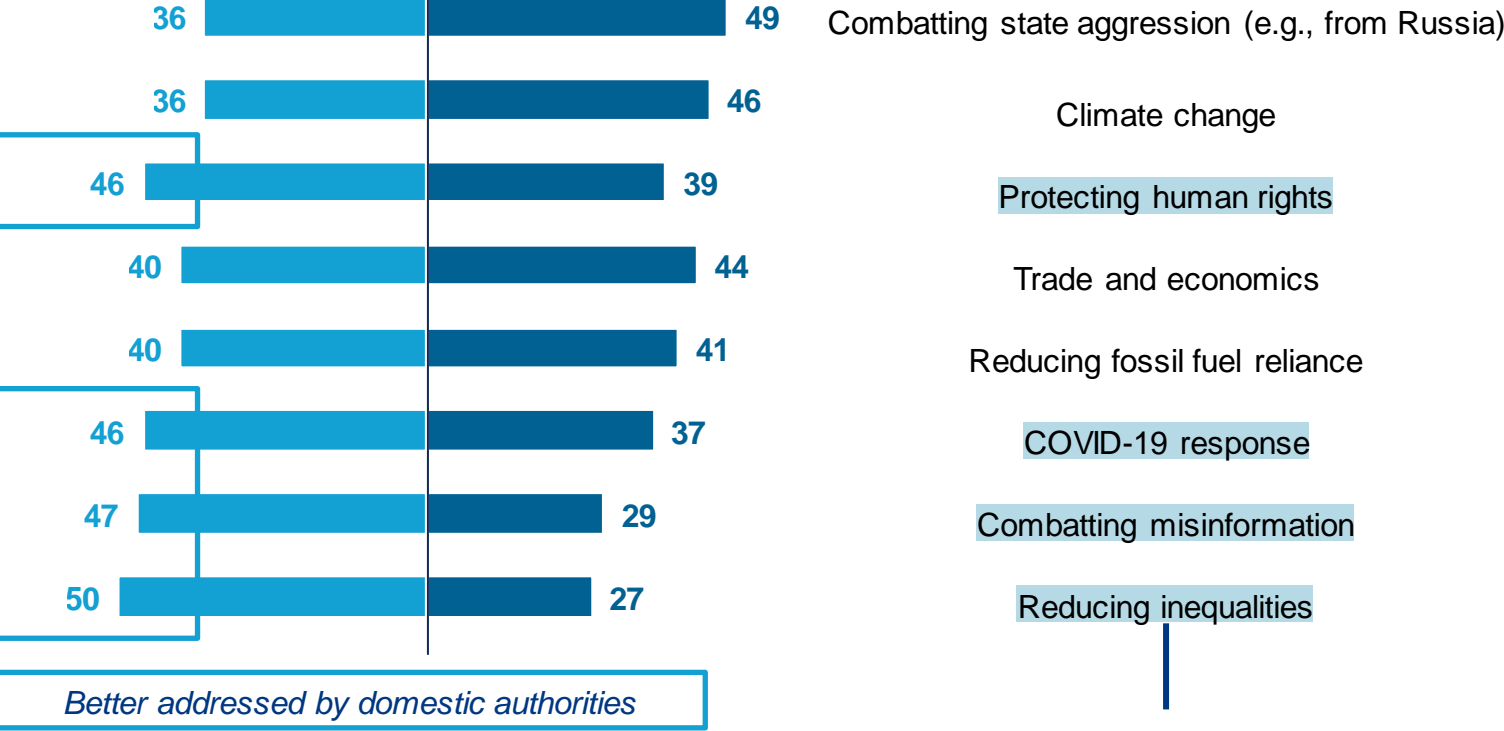
Americans think some specific issues are better addressed by domestic authorities.



% who believe each issue is better addressed by...

State/federal governments

International cooperation



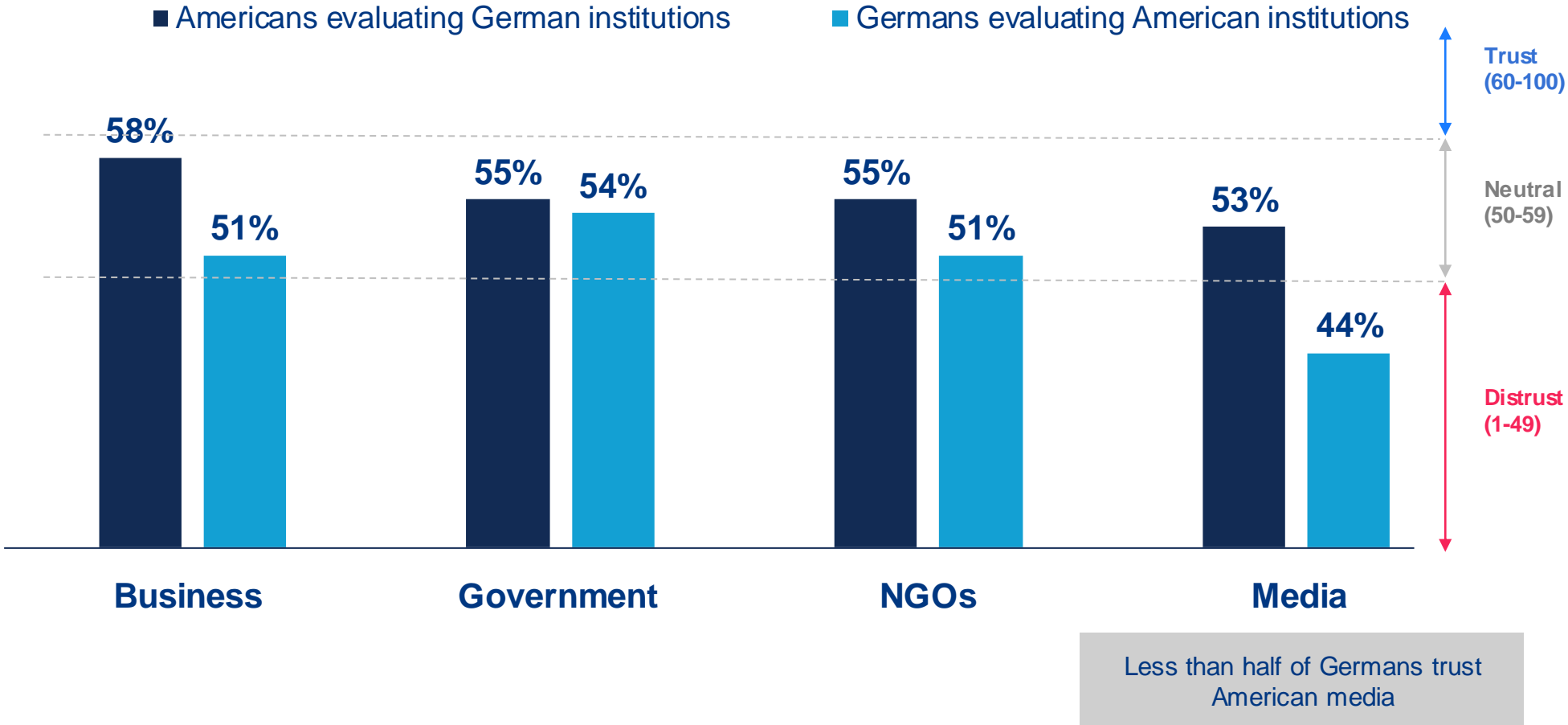
Q3. When thinking of the following issues, do you believe they are better addressed through international cooperation or your state or federal government? 7-point scale. State/federal government codes 1-3. International cooperation codes 5-7. Total respondents, US n=2002.

02

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.

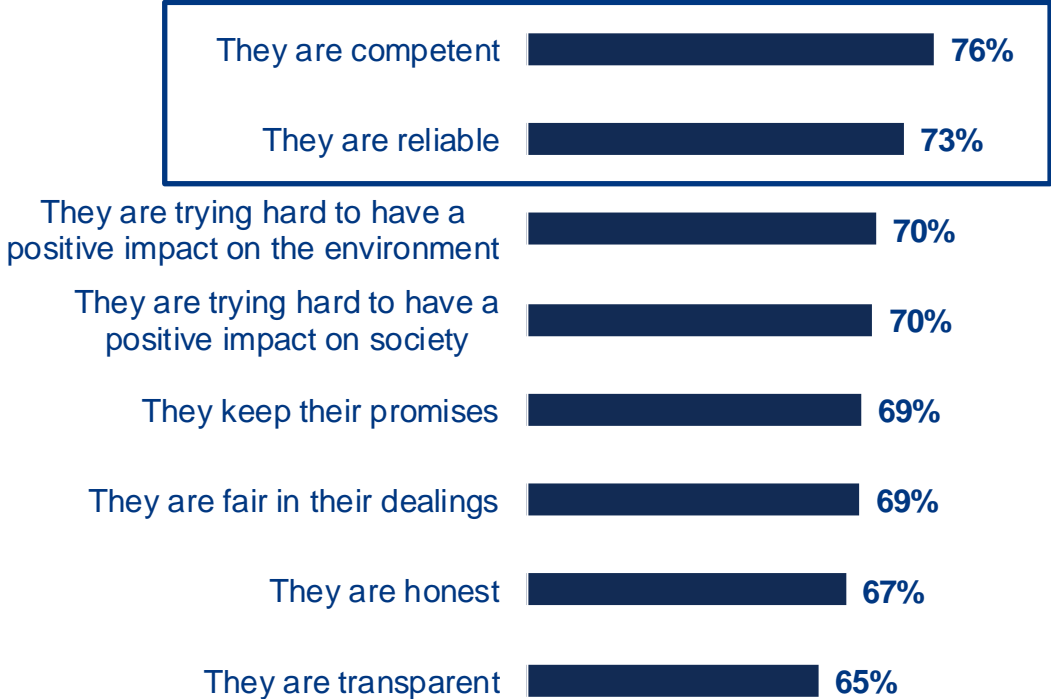
% of trust in institutions of the other country



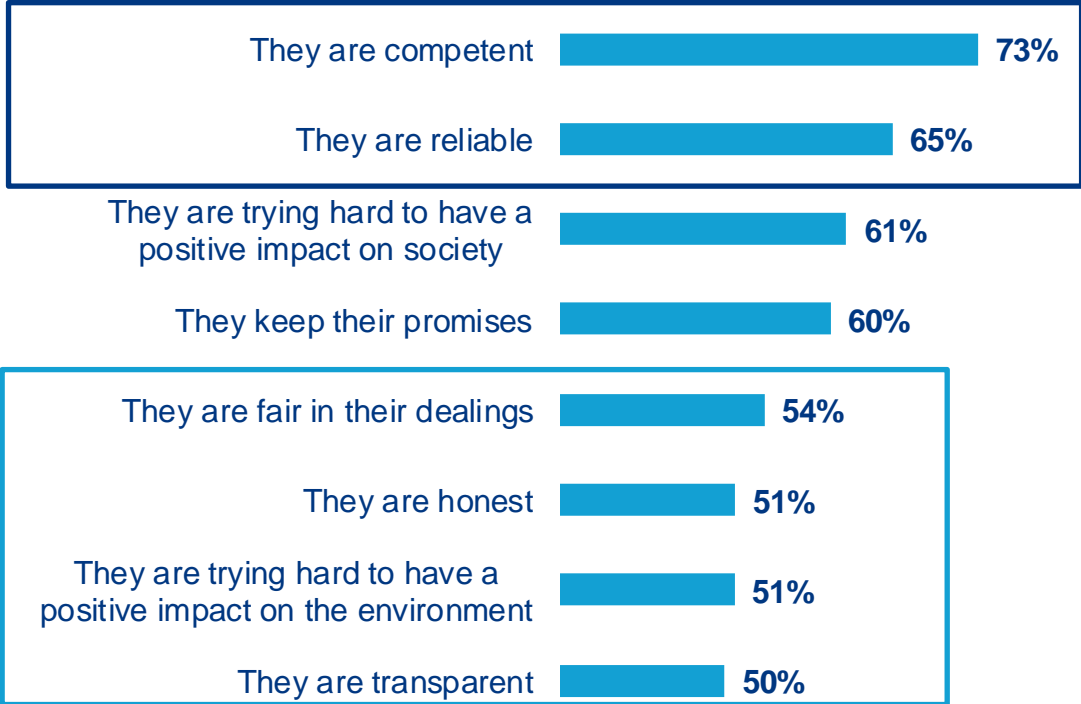
Q9:How much do you trust the following [American/German] institutions to do what is right? 7-point scale. Top 4. Total respondents, US n=2,002, Germany n=2,001

Americans have more positive perceptions of German businesses than vice versa.

Americans evaluate German businesses - % who agree



Germans evaluate American businesses - % who agree



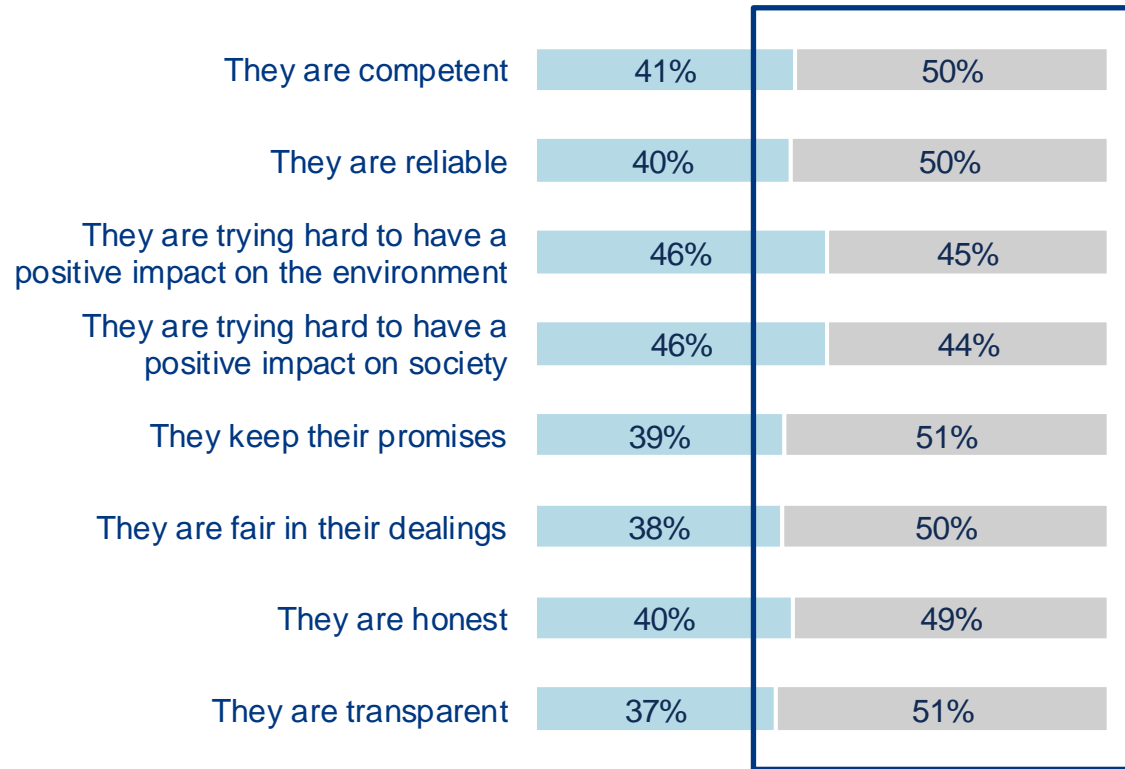
Germans acknowledge the competence and reliability of American businesses but doubt their transparency, honesty and commitment to address environmental issues

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.

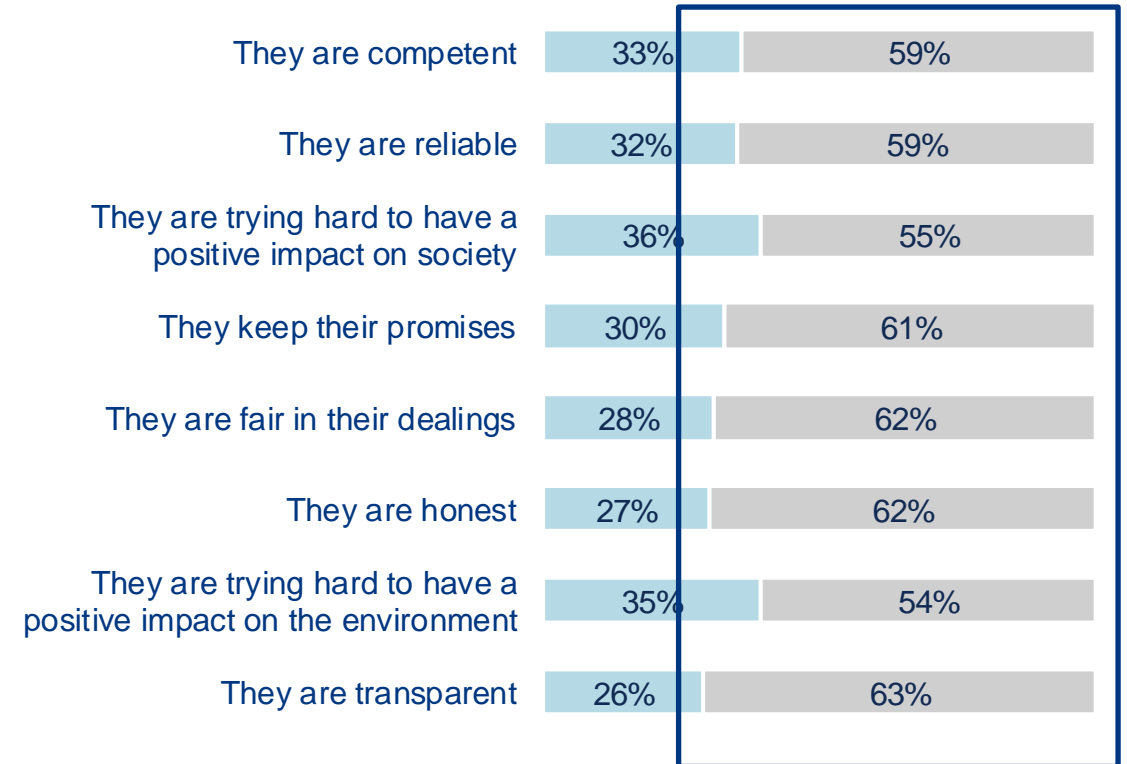
Americans evaluate German businesses over time

% who agree



Germans evaluate American businesses over time

% who agree



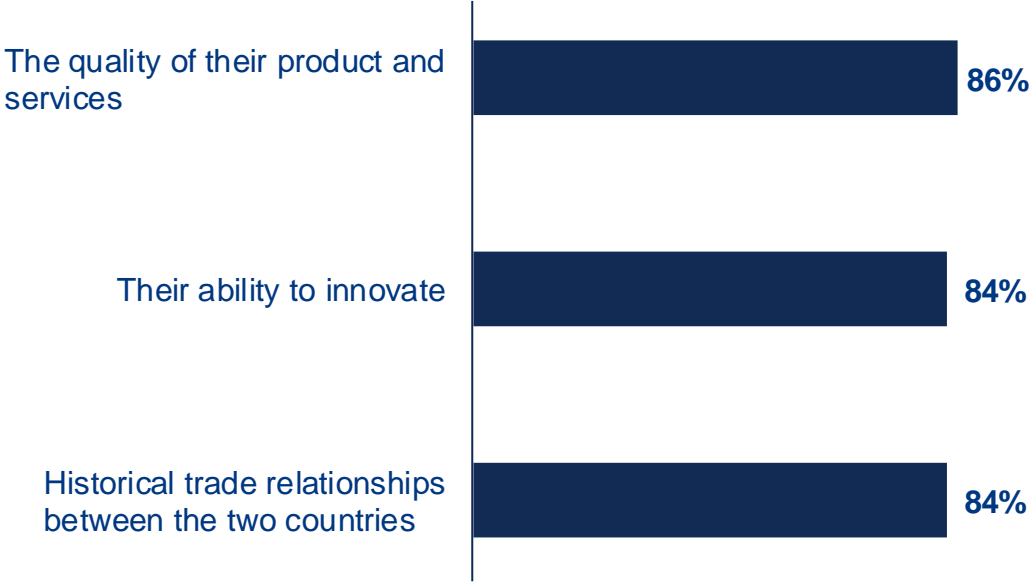
■ Has gotten better recently ■ Has stayed the same

Trust in business is consistently driven on both sides by quality, innovation and historical relationships.

Asked among those who **trust** the other country's businesses

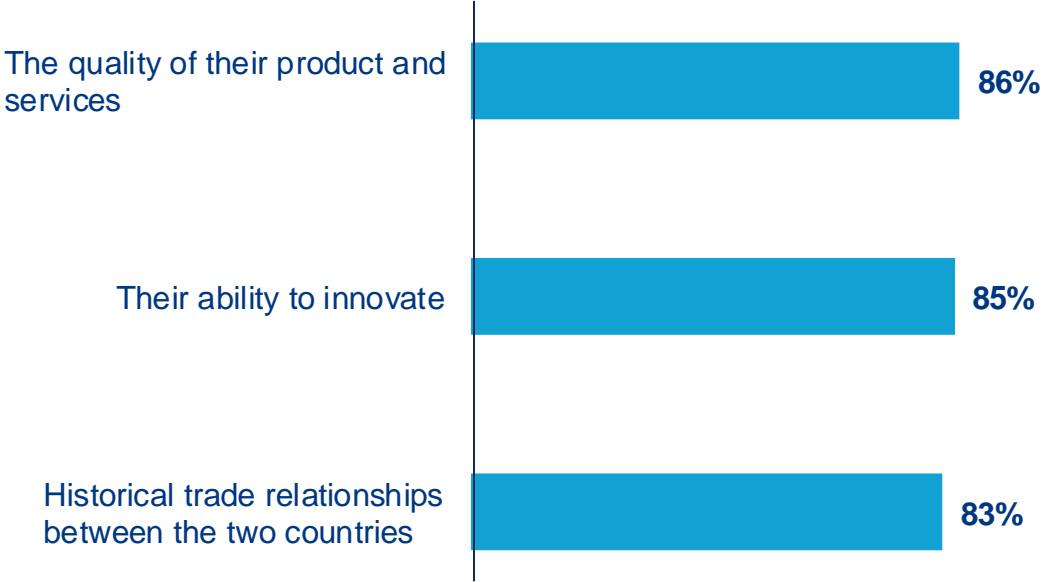
Americans' top 3 reasons to trust German businesses

I trust them because - % who agree



Germans' top 3 reasons to trust American businesses

I trust them because - % who agree



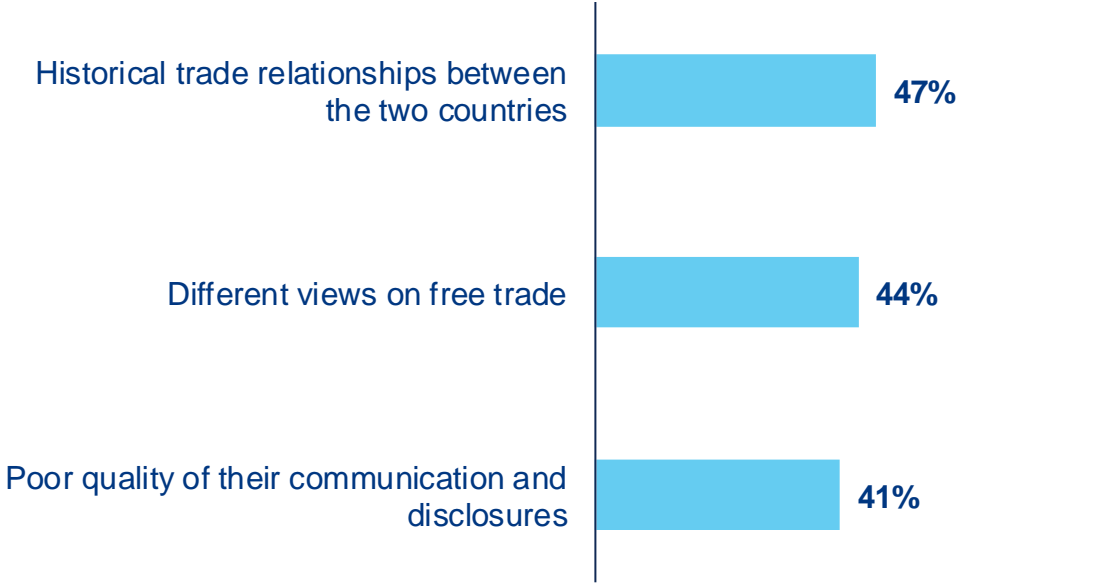
Q15a. Thinking about [AMERICAN/GERMAN] companies in general, to what extent do you agree or disagree with the following statements? 7-point scale. Top 3. percentage trusting businesses. All respondents who trust [AMERICAN/GERMAN] business.

Distrust in business is driven by differing views of free trade and regulation.

Asked among those who **distrust** the other countries' businesses

Americans' top 3 reasons to distrust German businesses

I don't trust them because - % who agree



Germans' top 3 reasons to distrust American businesses

I don't trust them because - % who agree



Q15b. 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 distrusting businesses. All respondents who distrust [AMERICAN/GERMAN] business.

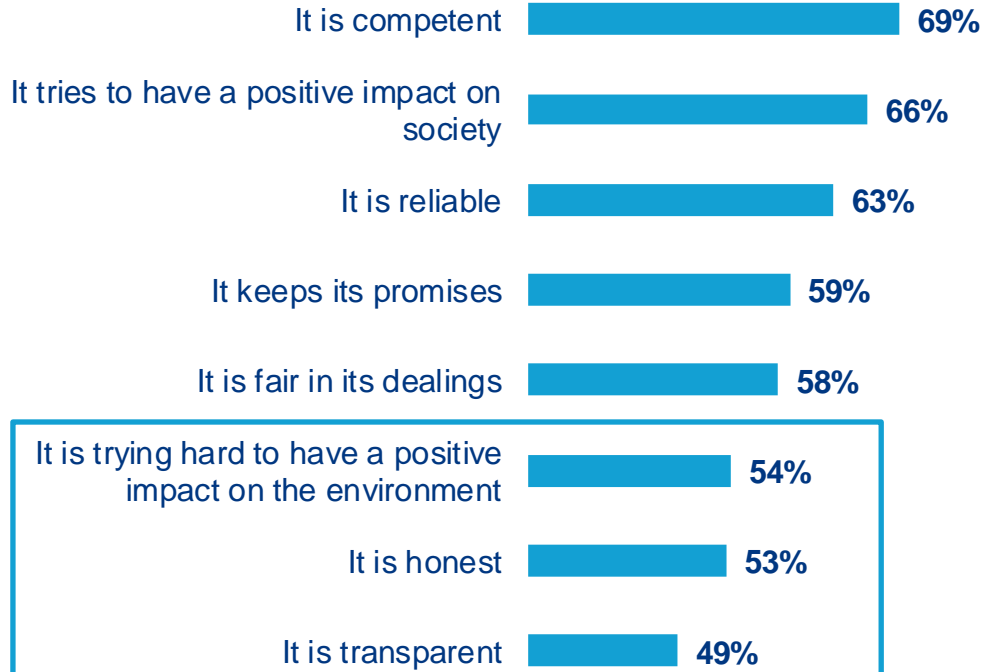
Americans feel positive about the German government. Germans are skeptical of US honesty and transparency.

Americans evaluate German government - % who agree



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

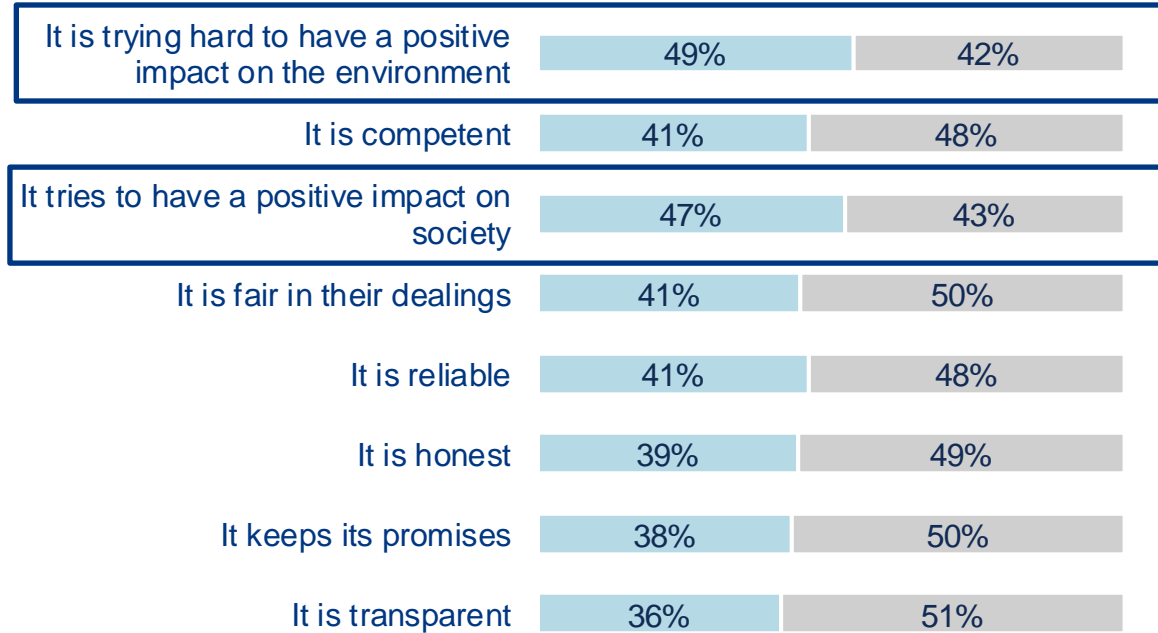
Germans evaluate American government - % who agree



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

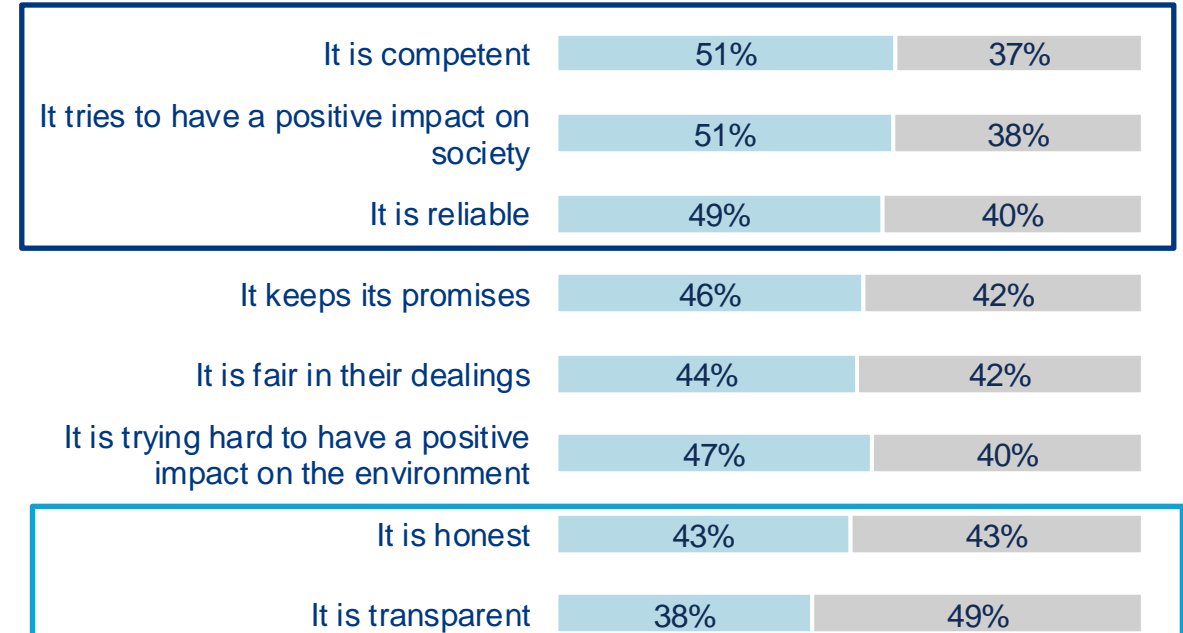
Views of German government have remained largely unchanged. US government increasingly perceived as competent.

Americans evaluate German government over time



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

Germans evaluate American government over time



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

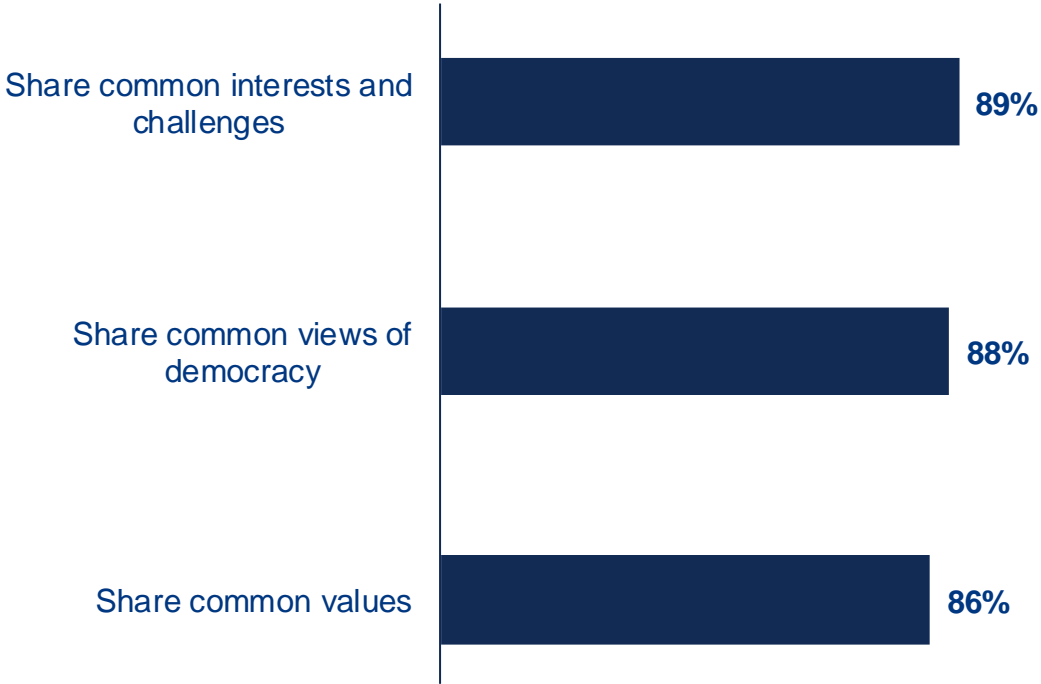
■ Has gotten better recently ■ Has stayed the same

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

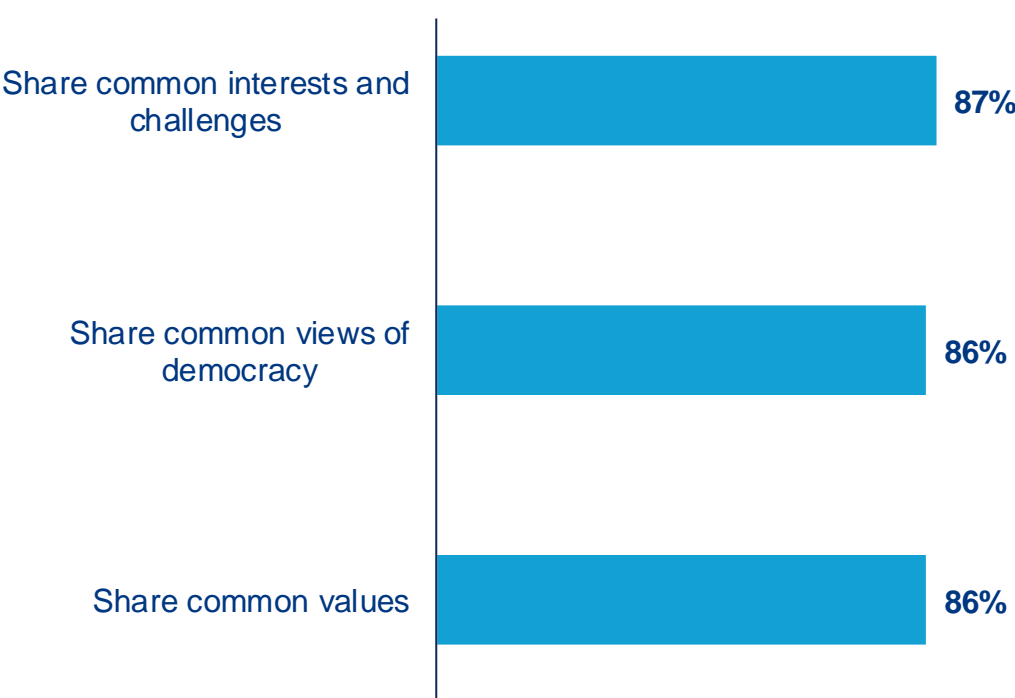
Americans' top 3 reasons to trust the German government

I trust it because - % who agree



Germans' top 3 reasons to trust the American government

I trust it because - % who agree



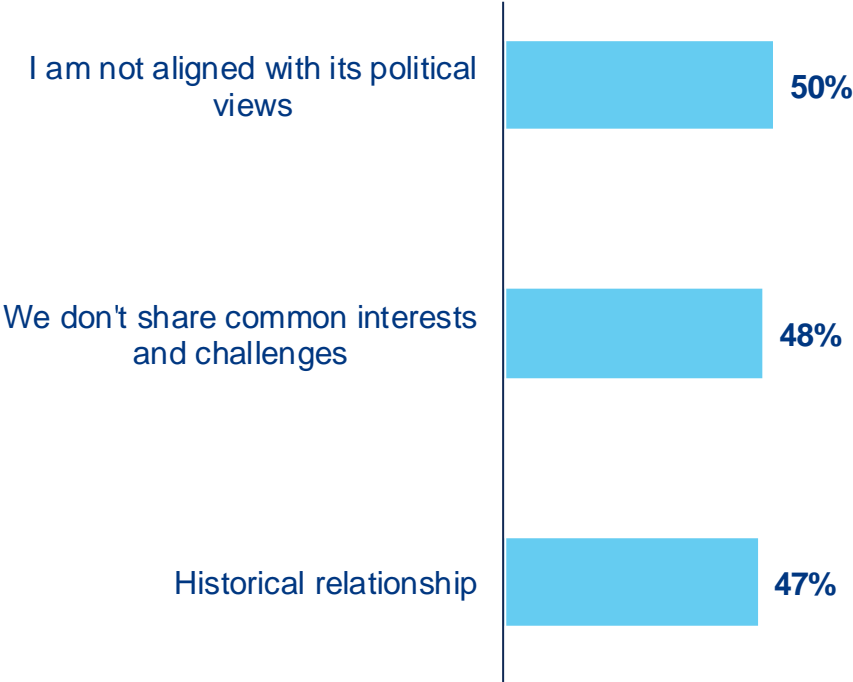
Q12a. Thinking about the [AMERICAN/GERMAN] government, to what extent do you agree or disagree with the following statements? 7-point scale. Top 3. percentage trusting government. All respondents who trust [AMERICAN/GERMAN] government.

Distrust in governments driven by political misalignment and inability to regulate.

Asked among those who **distrust** the other countries' government

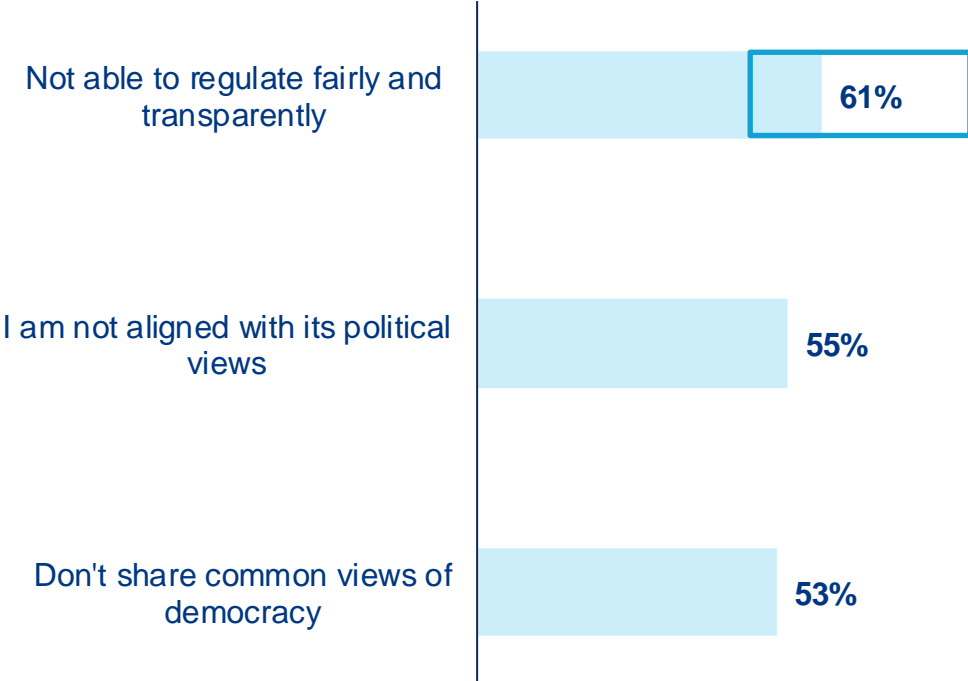
Americans' top 3 reasons to distrust the German government

I don't trust it because - % who agree



Germans' top 3 reasons to distrust the American government

I don't trust it because - % who agree



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.

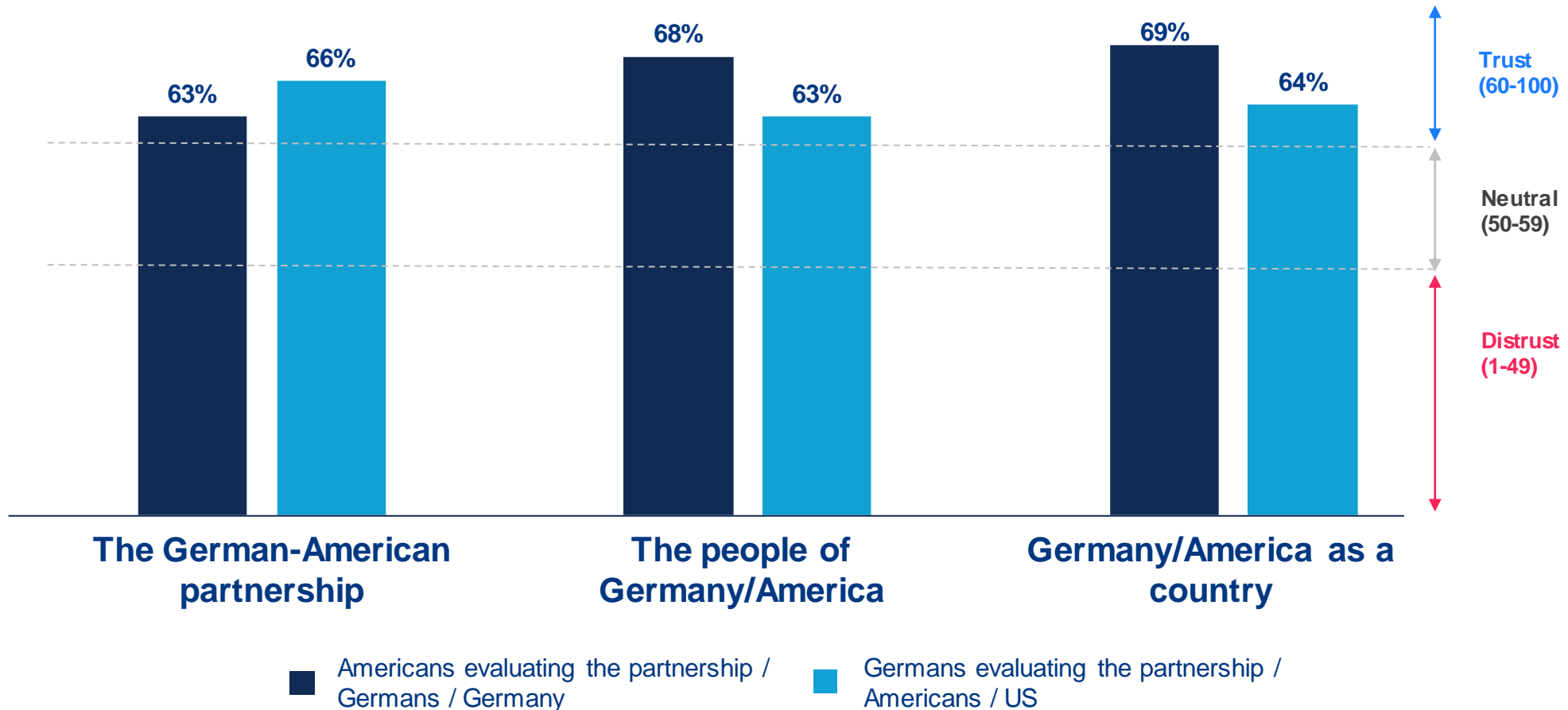
03

In partnership

We trust

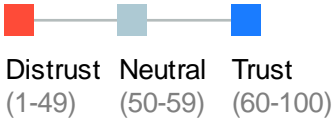
Strong Trust in the partnership and in each other's people and country.

% who trust

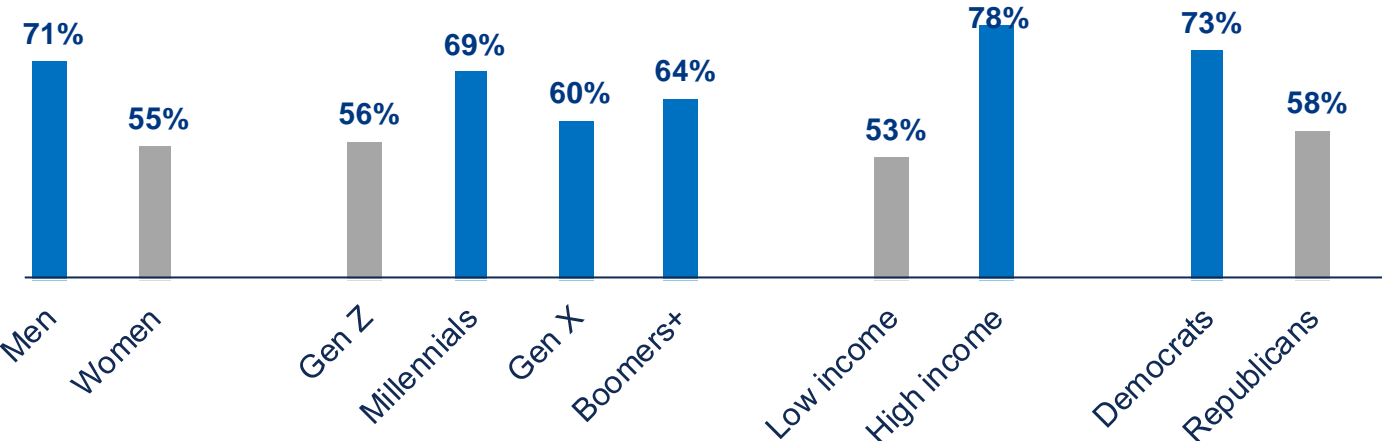


Men, older, and more affluent groups more trusting of the partnership. No group is distrusting.

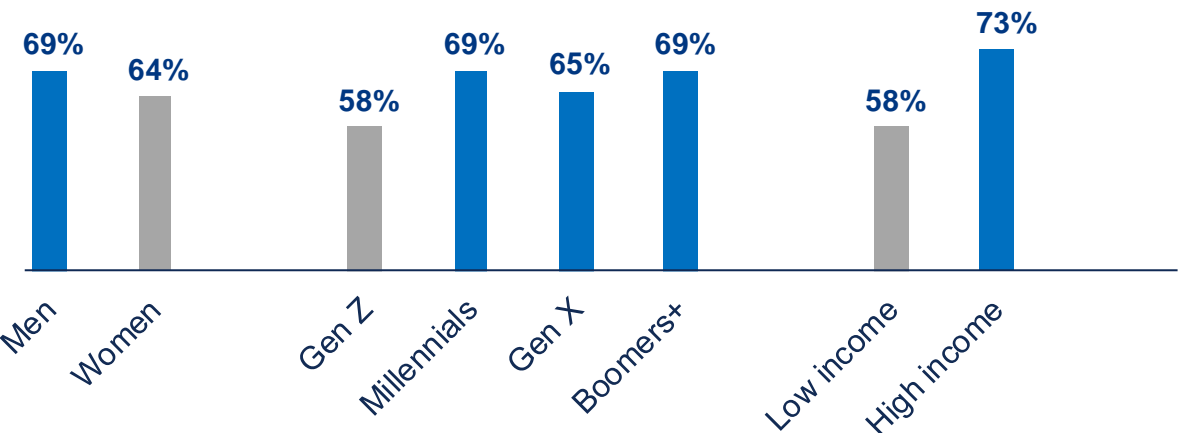
% who trust



63%
of Americans trust the partnership

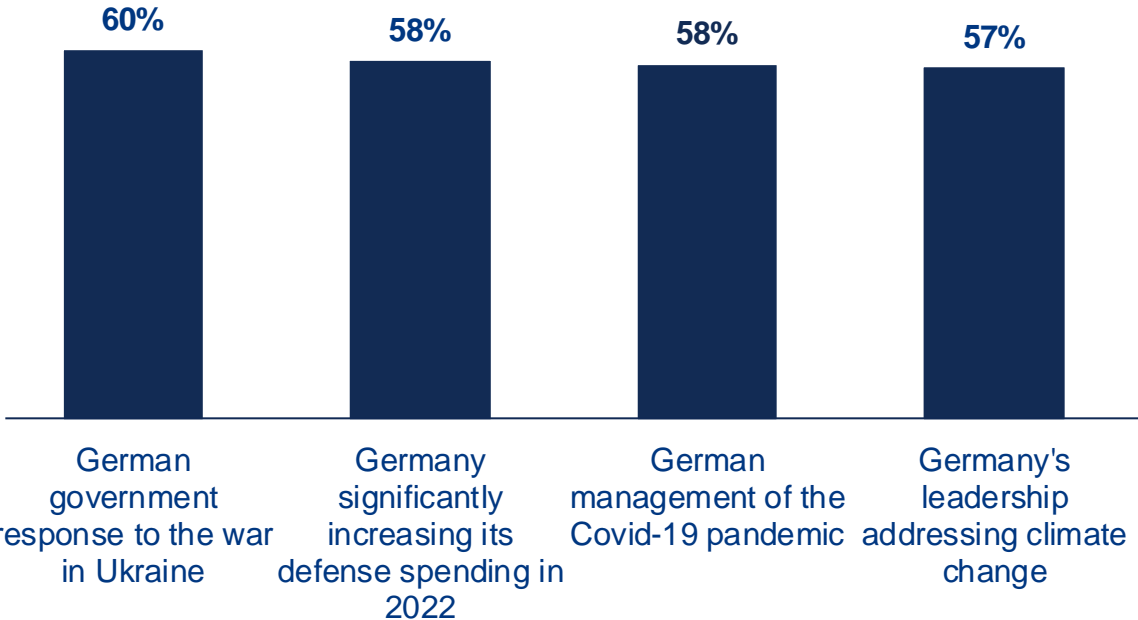


66%
of Germans trust the partnership

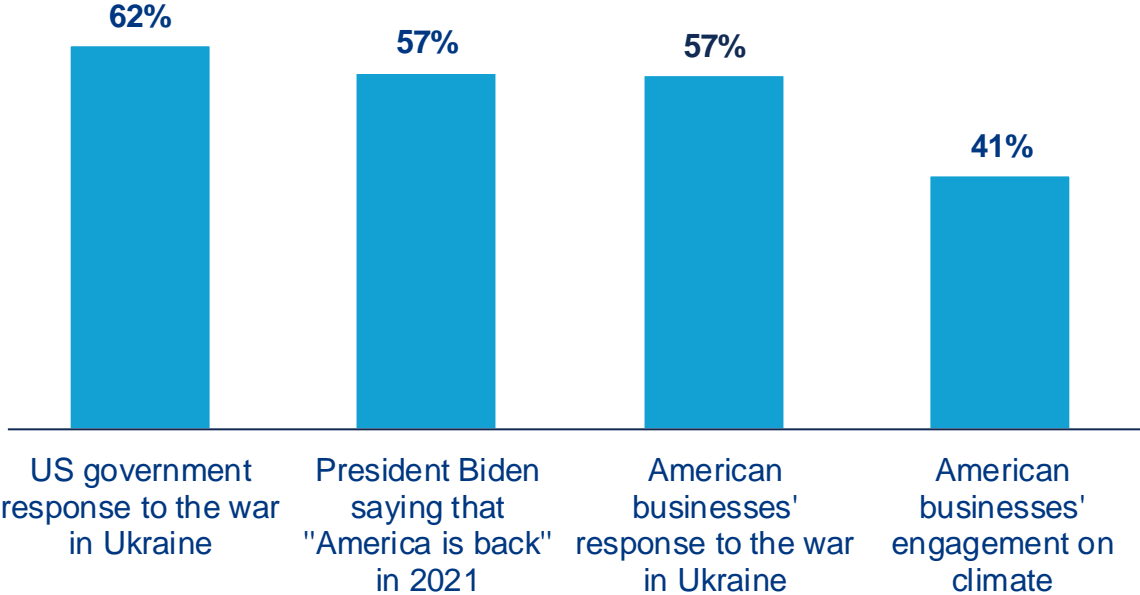


Response to the war in Ukraine has increased trust in both the US and Germany, as countries.

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



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



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

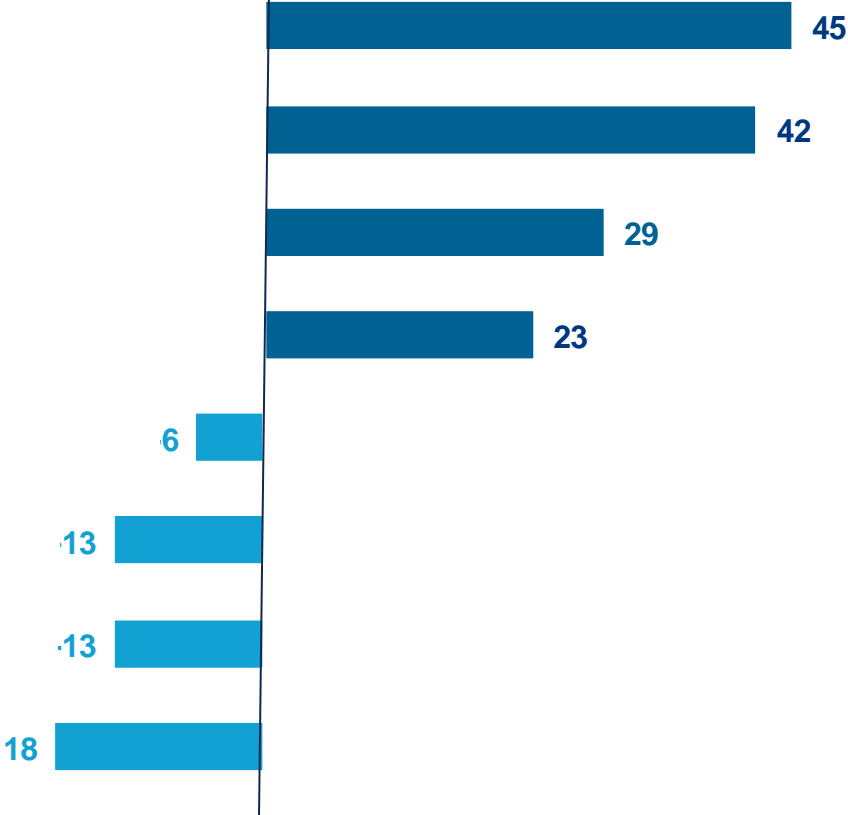
Engagement in Ukraine and on climate has built trust in the US as a country vs. other recent events.

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

- US government response to the war in Ukraine
- President Biden saying that "America is back" at the Munich Security Conference in 2021
- American businesses' engagement on climate
- American businesses' response to the war in Ukraine
- US Supreme Court may overturn Roe vs. Wade abortion law
- Attack on the US Capitol in 2021
- Media misinformation
- Wealthy elite engaging in tax avoidance

Trust lowering events

Trust building events



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.



69% 72%

Agree the US-German partnership is strong



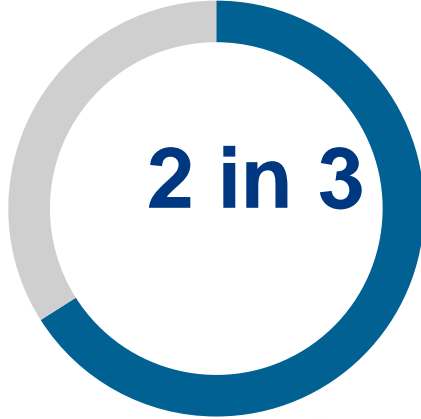
73% 72%

Agree a strong US-German partnership is crucial for the world's stability



70% 75%

Agree the US-German partnership is indispensable now more than ever



68% 64%

Agree the US and Germany are complementary

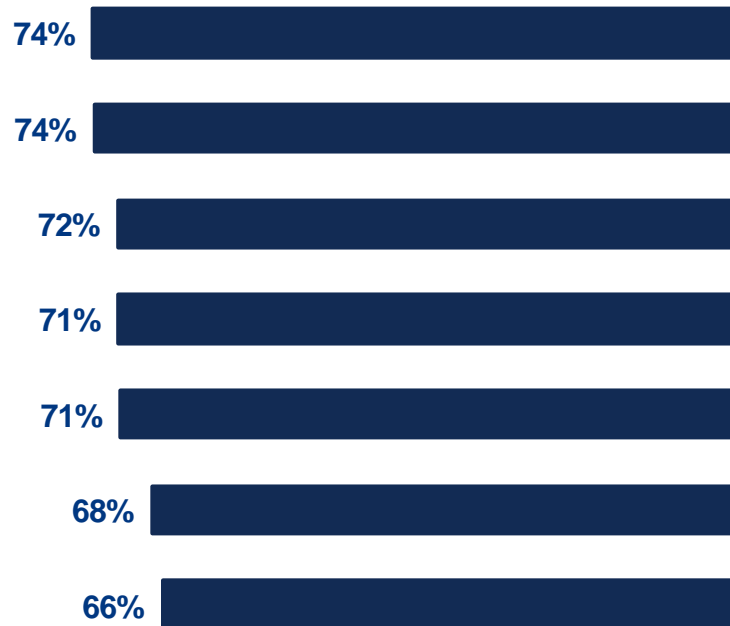
59% 65% **Agree** - New governments, led by Joseph Biden in the US and Olaf Scholz in Germany, have revitalized the strength of the US-German partnership

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

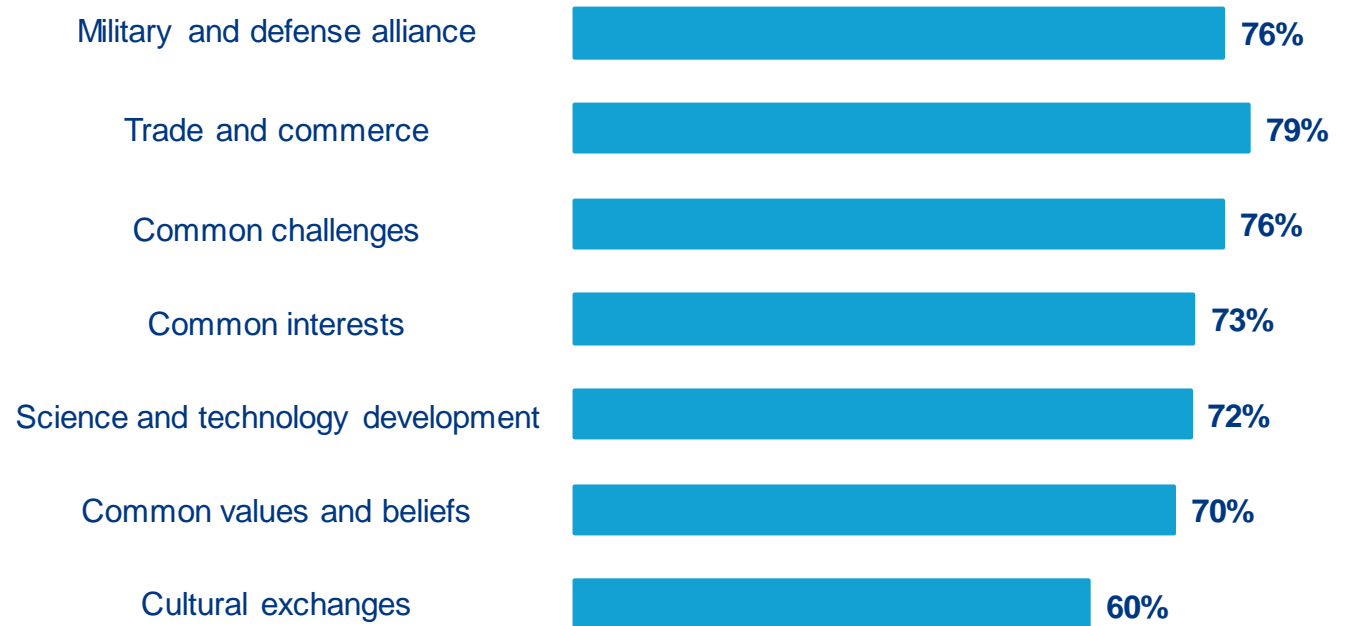
Broad alignment that partnership foundation is rooted in military alliance and trade.



% of Americans who agree the partnership is based on...




% of Germans who agree the partnership is based on...



Opportunity to improve cultural exchanges between the two countries

Majority say the partnership is equal, with shared strengths in innovation, diplomacy and economic power.



AMERICAN STRENGTH

65% of Germans say military capabilities 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



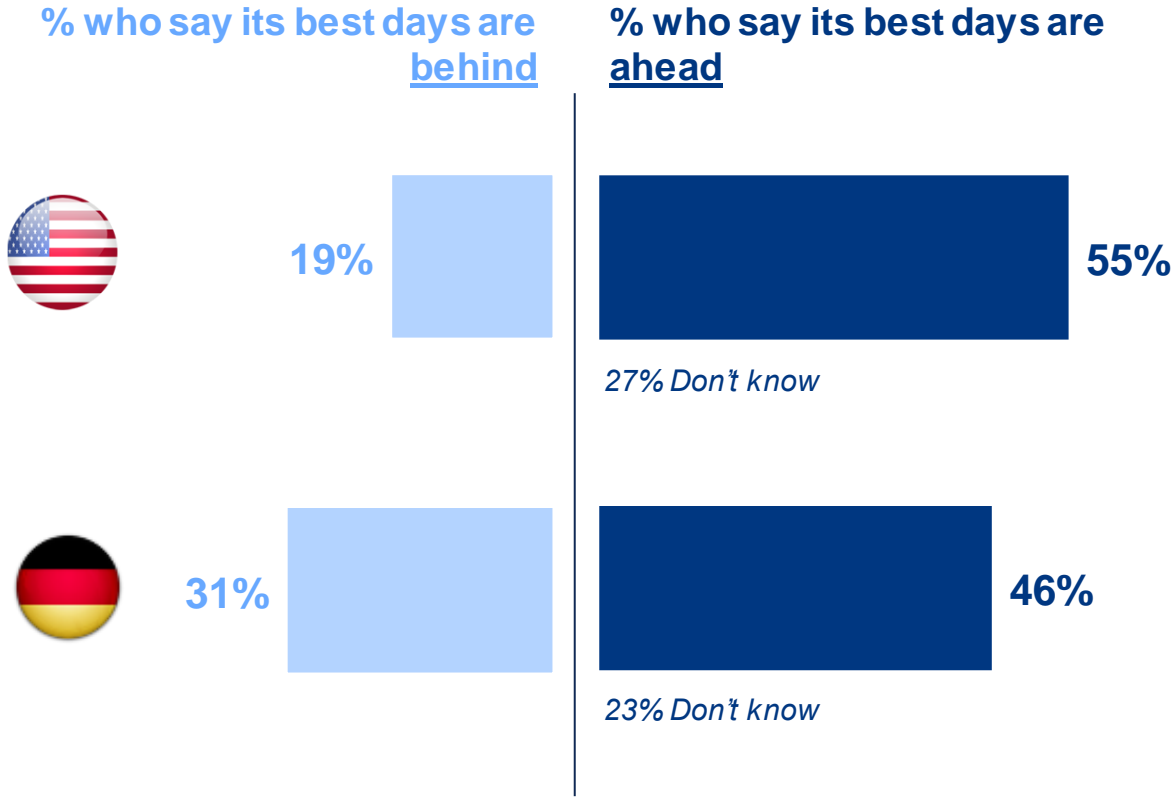
GERMAN STRENGTH

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

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.

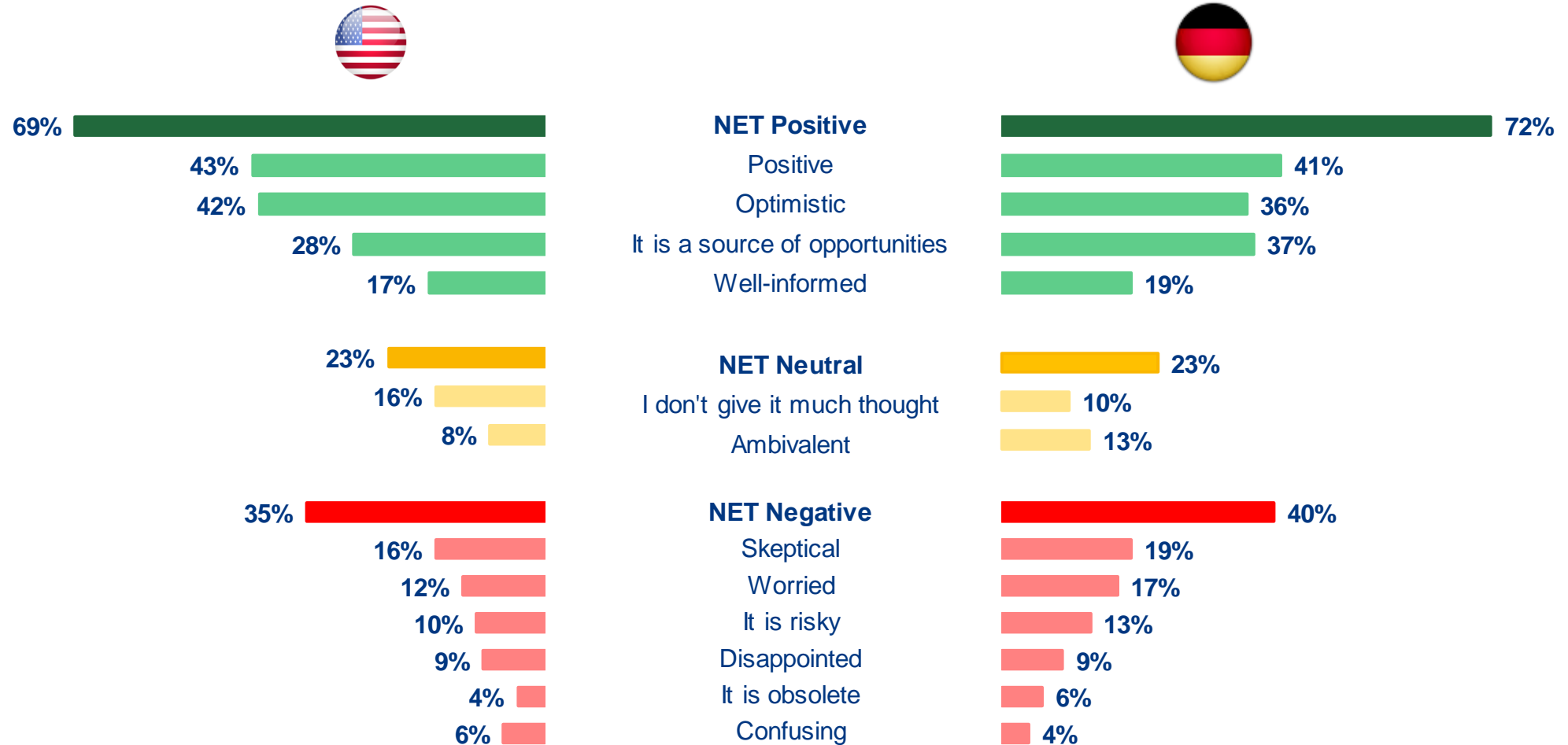


Younger generations are more likely to agree that the partnership's best days are ahead.

Gen Z (18-26 yo)	Millennials (27-41 yo)	Gen X (42-55 yo)	Boomers + (56+)
54%	67%	53%	46%

Gen Z (18-26 yo)	Millennials (27-41 yo)	Gen X (42-55 yo)	Boomers + (56+)
66%	51%	40%	41%

Majority in both countries feel positively about the partnership.



04

Paving the way For the future

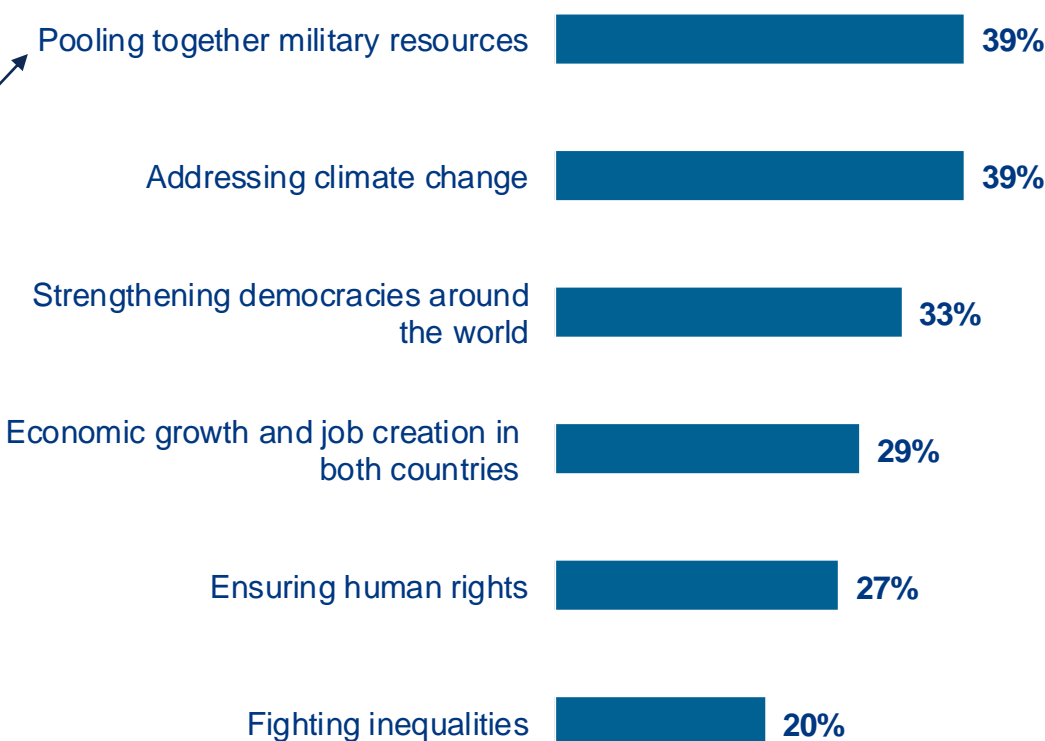
Both countries largely aligned on current priorities. Economic growth more of a priority in the US.



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



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



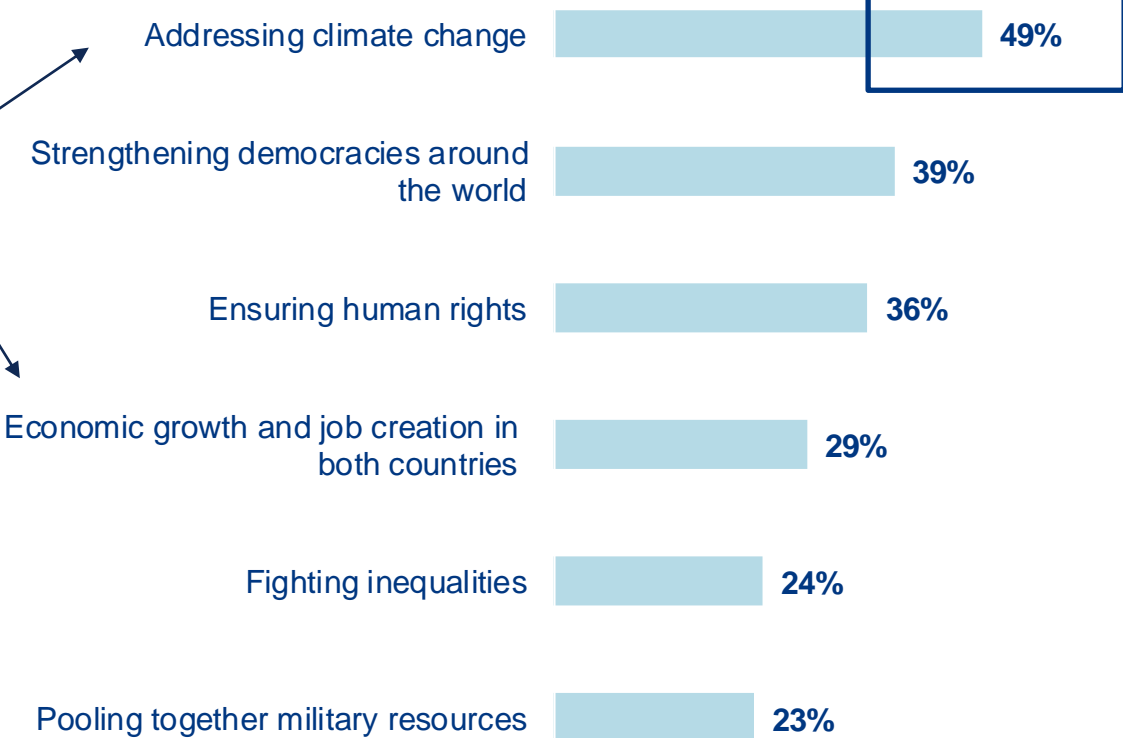
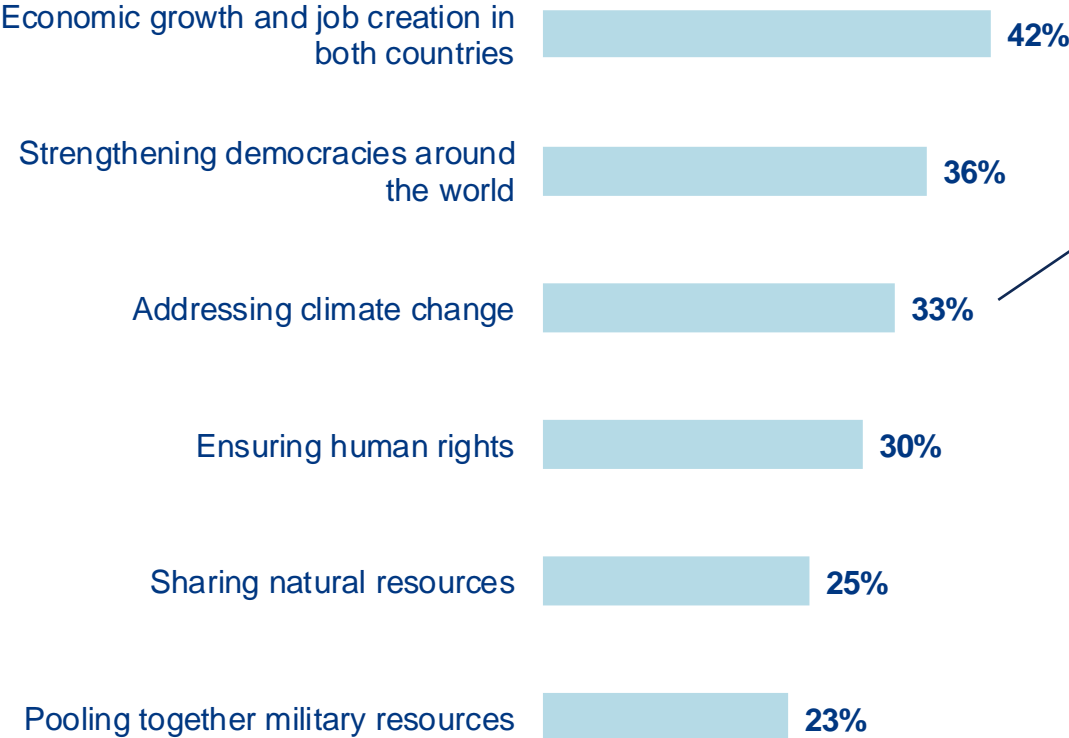
Q23: In your opinion, what are currently the top 3 priorities of the transatlantic partnership between the US and Germany? Total respondents, US n=2,002, Germany n=2,001

Future priorities of the partnership are similar. Climate change becoming more urgent for Germans.



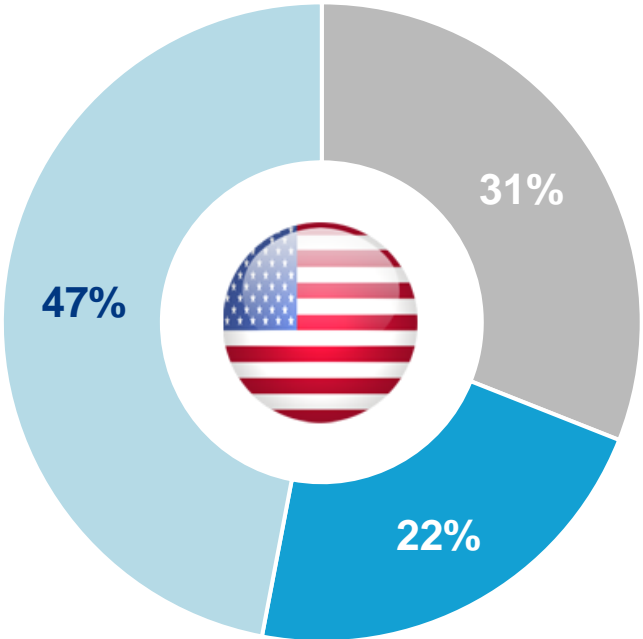
Top future priorities of the US–German partnership according to Americans

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

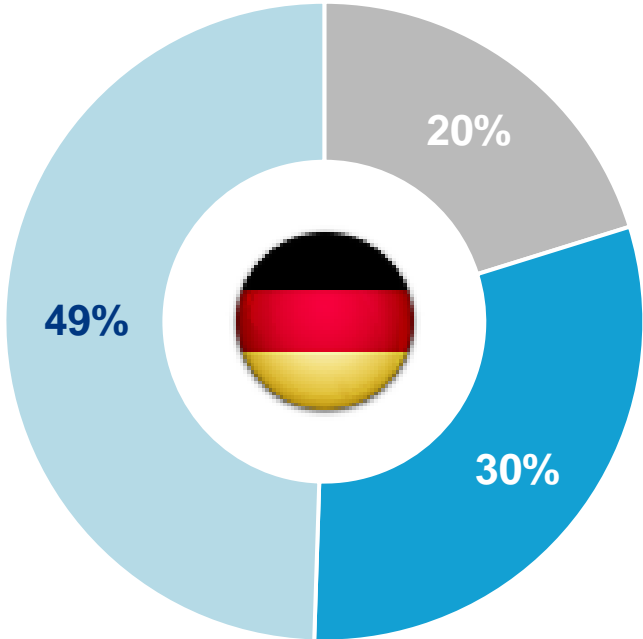


Q22: In your opinion, what should be the top 3 priorities of the transatlantic partnership between the US and Germany? Total respondents, US n=2,002, Germany n=2,001

Three in four believe the partnership has global benefits and not only a domestic focus.



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

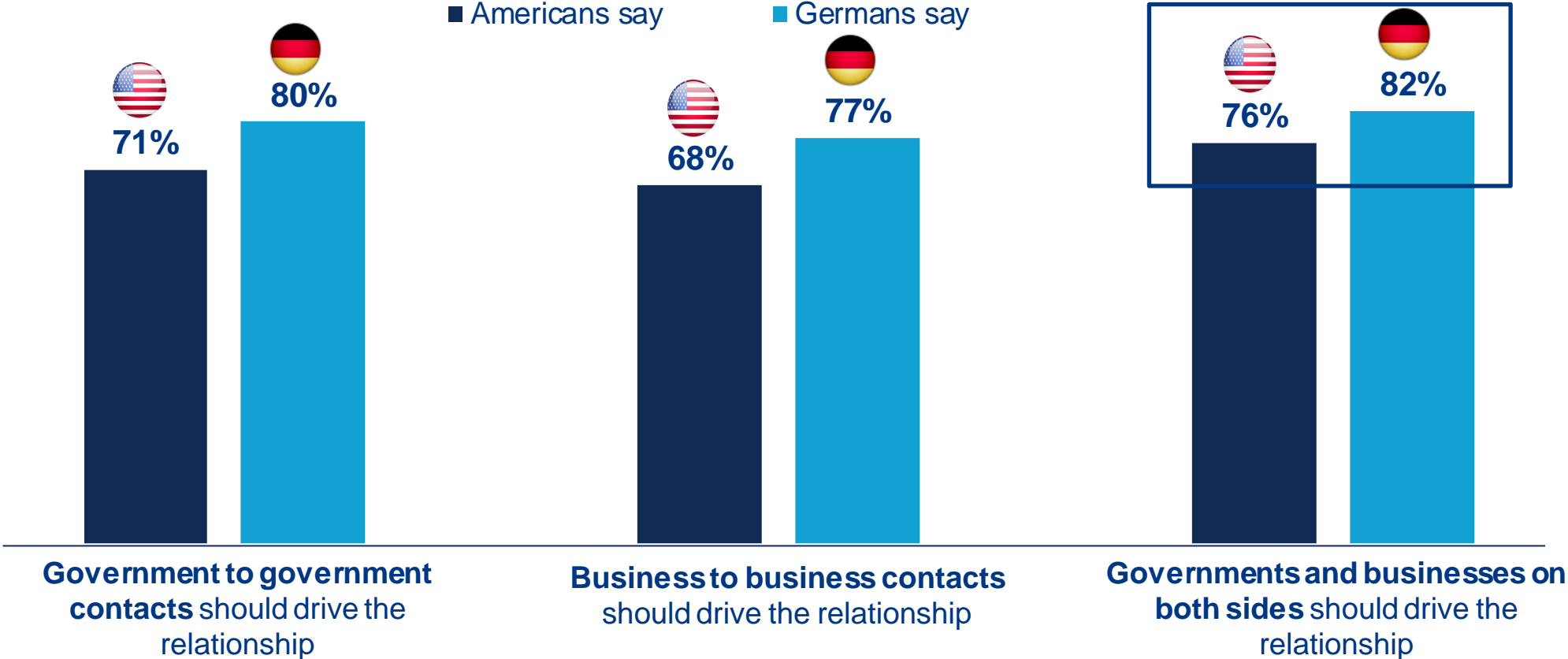


Equal focus on both domestic and global improvements

Improving the global situation

Improving both countries domestically

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



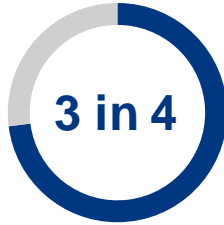
77% 82%

Be **more transparent** in how they deal with each other



71% 81%

Business relationships **should not be dependent on the governments in place**



72% 74%

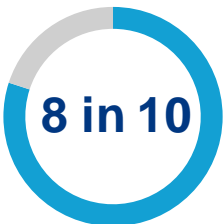
Align long-term goals with short-term action plans

Top priorities for governments on both sides



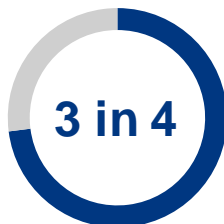
76% 83%

Be **more transparent** in how they deal with each other



76% 80%

Should work together to **strengthen military defense and economic security in democracies**



71% 81%

Relationships **should not be dependent on the governments in place**

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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