



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

2024 Report

Methodology

Methodology:

15-minute online survey

Markets:

US and Germany

Fieldwork:

- 2022 Wave 1: May 2022
- 2024 Wave 2: March 2024

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 in 2022: n=4,003 respondents (n=2,002 in the US and n=2,001 in Germany)
- Total base size in 2024: n=4,000 respondents (n=2,000 in the US and n=2,000 in Germany)

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01

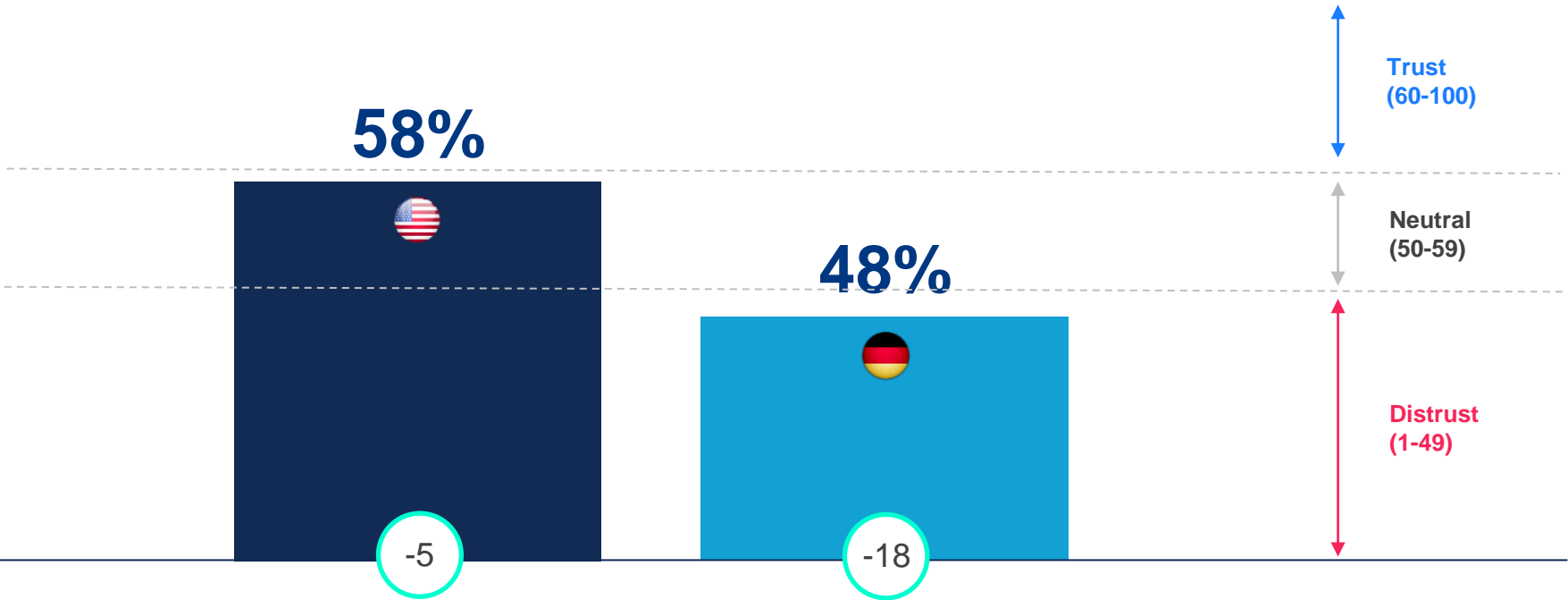
The state of the German-American partnership today

Trust in the partnership has declined since 2022; most notably among Germans

% who trust the partnership

The German-American partnership

- Americans evaluating the partnership
- Germans evaluating the partnership
- +/- Difference vs 2022
- Significant change vs 2022



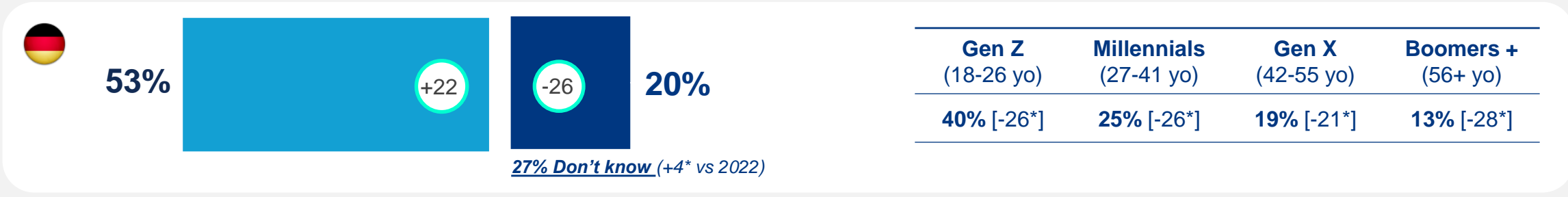
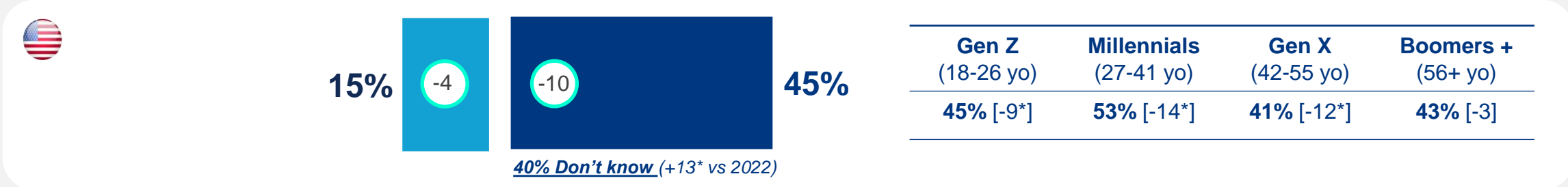
Q9:How much do you trust the following [AMERICAN/GERMAN] institutions to do what is right? Q18: To what extent do you trust the German-American partnership to do what is right? 7-point scale. Top 4 boxes. Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000. Question source: Edelman Trust Barometer.

Clear drop in optimism around the partnership across countries and generations. More are ambivalent too

+/- Difference vs 2022

○ Significant change vs 2022

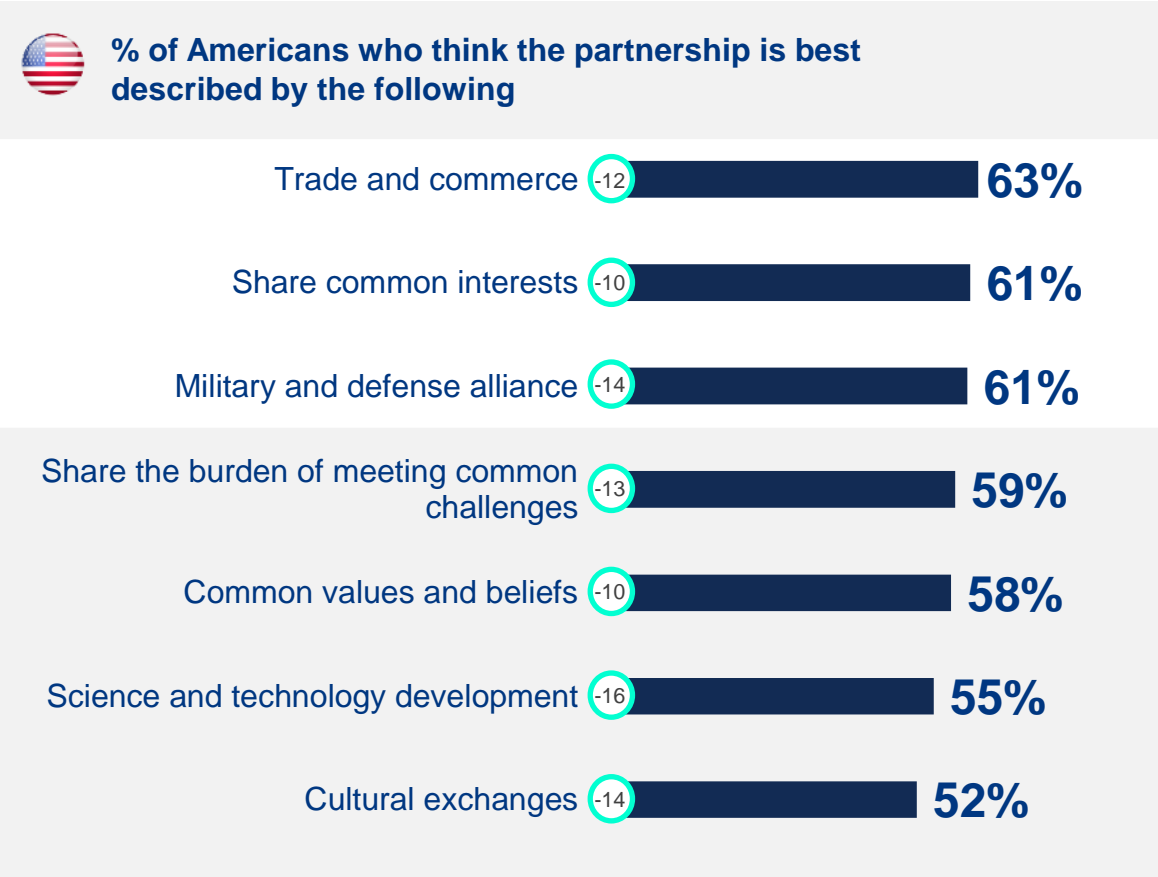
% who say the partnership's best days are behind **% who say the partnership's best days are ahead**



Q6. Thinking of the German-American partnership, would you say that the partnership's best days are...
 Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Trade, common interests and military alliance remain the partnership's main characteristics

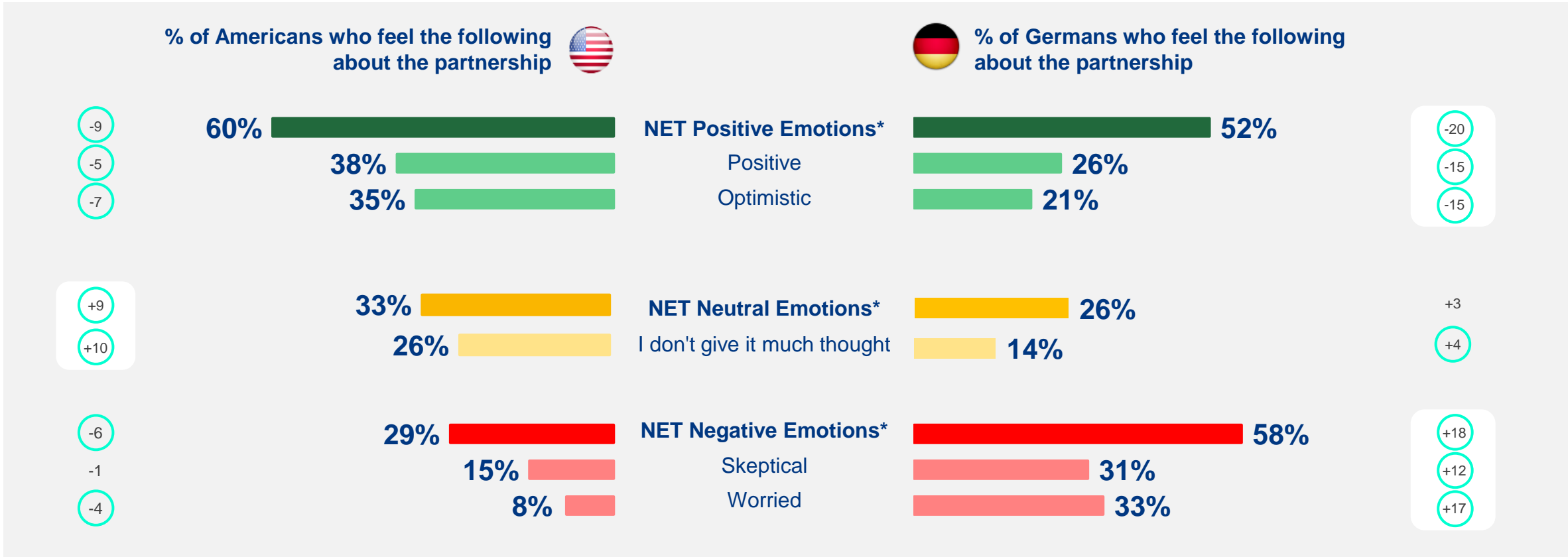
+/- Difference vs 2022 Significant change vs 2022



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 . (Totally describes the foundation of the partnership) Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Germans feel more negatively towards the partnership, whilst Americans become more ambivalent

+/- Difference vs 2022 Significant change vs 2022



*Showing statements with the most notable changes vs 2022 only; | Q8: Which of the below describe how you feel about the German-American partnership?
 Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

02

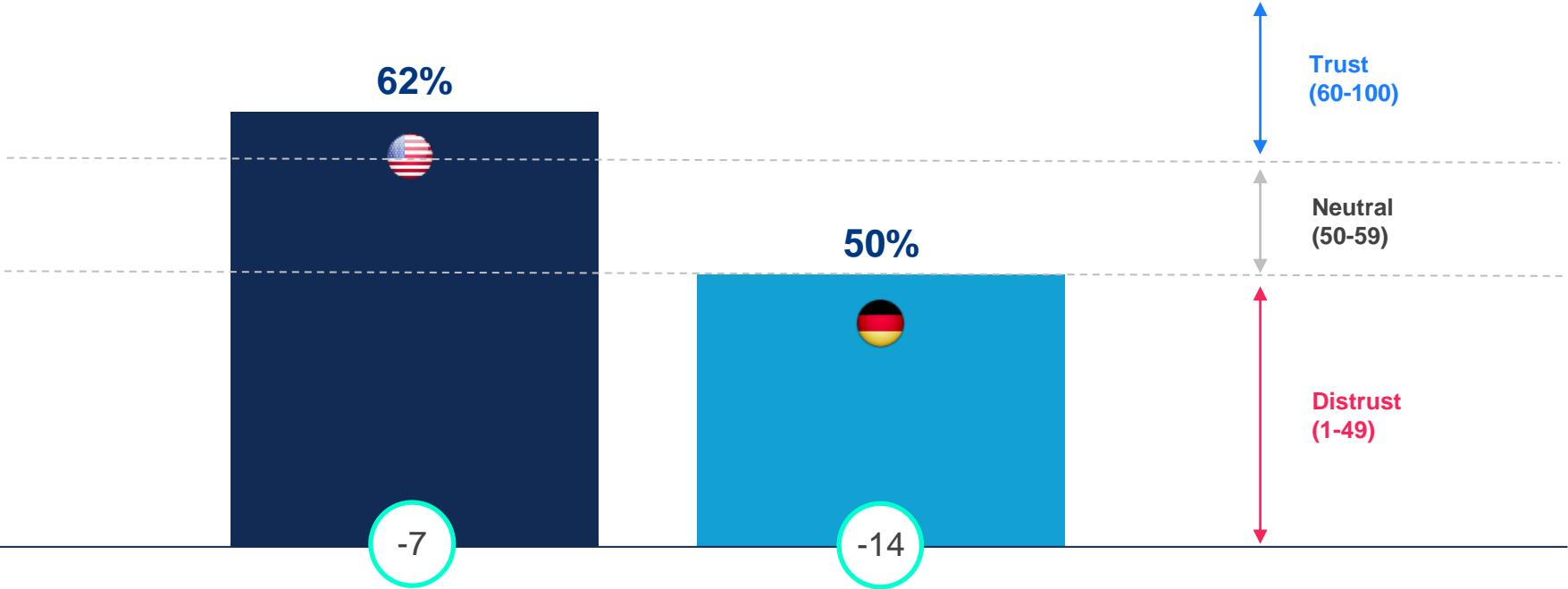
Lower trust in Germany and the US

Trust in each other's country has declined; most notably among Germans

% who trust each other's country

Germany/America as a country

- Americans evaluating Germany
- Germans evaluating the US
- ⊕/⊖ Difference vs 2022
- Significant change vs 2022



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 boxes. Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000. Question source: Edelman Trust Barometer.

The lack of consensus alongside media misinformation are common drivers of distrust in both countries

+/- Difference vs 2022 Significant change vs 2022



Top 5 events that have made Americans less trusting of Germany as a country

Top 5 of 12

1	The rise of extremist political parties	26%	New
2	The growing lack of willingness to reach compromise and consensus	19%	New
3	Media misinformation	18%	-6
4	Germany's reliance on imported energy	16%	New
5	The response of German businesses to incidents of antisemitism	14%	New



Top 5 events that have made Germans less trusting of the US as a country

Top 5 of 13

1	Incidence of gun-related violence	62%	New
2	Attack on the Capitol on January 6, 2021	50%	+8
3	Media misinformation	43%	+2
4	The growing lack of willingness to reach compromise and consensus	42%	New
5	Efforts to address climate change	33%	New

Q16a/b: To what extent have the following events made you more or less trusting of [GERMANY/AMERICA] as a country? | 7-point scale. Less trusting Bottom 3 (Made me much less trusting of the US/Germany). Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Responses to conflicts are key drivers of trust in both nations

+/- Difference vs 2022 ○ Significant change vs 2022

Top 5 events that have made Americans more trusting of Germany as a country Top 5 of 12

1	The quality of German manufacturing	55%	New
2	Germany increasing its defense spending	42%	-16
3	German government response to the war in Ukraine (humanitarian, military)	41%	-19
4	Germany's leadership addressing climate change	41%	-16
5	Demonstrations by Germans against extremist political parties	39%	New

Top 5 events that have made Germans more trusting of the US as a country Top 5 of 13

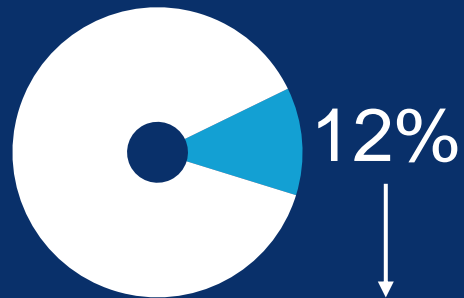
1	Efforts to strengthen the NATO alliance	39%	New
2	US government response to the war in Ukraine	39%	-23
3	The innovative power of American businesses	38%	New
4	Influence of American technology companies	32%	New
5	US response to the war between Israel and Hamas	29%	New

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. (Made me much more trusting of the US/ Germany)
Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Germans perceive divisions within American society as deeply entrenched



% Americans who think Germany is very/extremely divided



Among those who think Germany is divided

44%

Believe that societal division in Germany is not entrenched

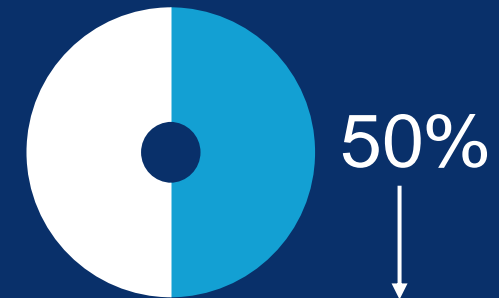


56%

Believe that societal division in Germany is entrenched



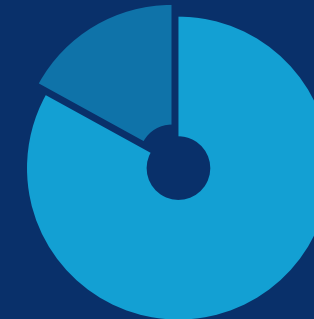
% Germans who think the US is very/extremely divided



Among those who think US is divided

17%

Believe that societal division in US is not entrenched



83%

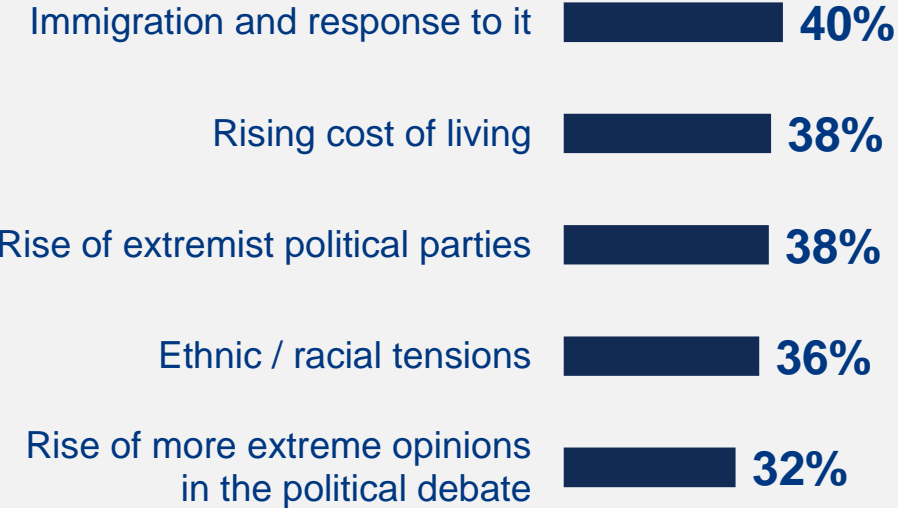
Believe that societal division in the US is entrenched

Social inequality and rise of extremism are the main drivers of division in the US, according to the Germans



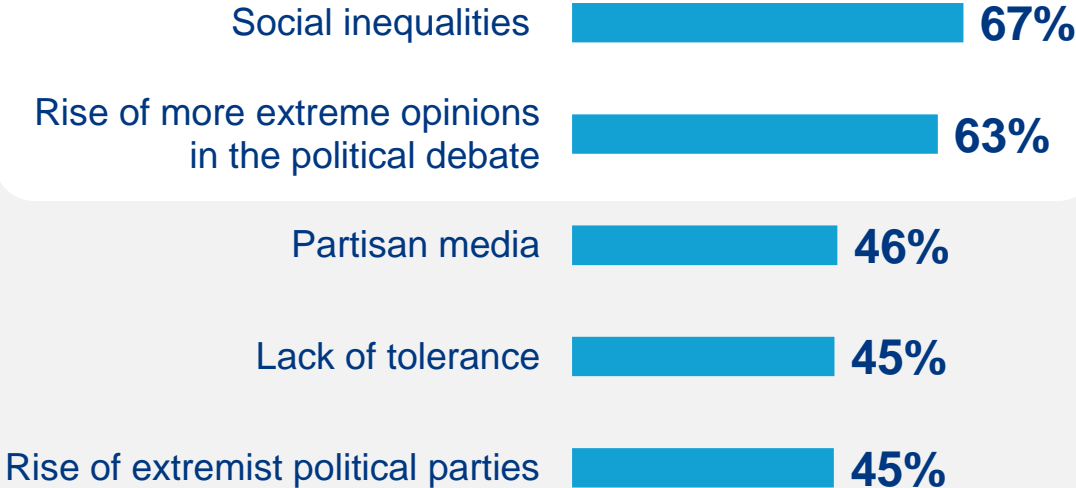
% of Americans who think Germany is a divided country because of the following

Top 5 of 12



% of Germans who think the US is a divided country because of the following

Top 5 of 12



QNEW5: What are for you the reasons why [GERMANY / USA] is divided?
Total respondents 2024, US n=231, Germany n=997

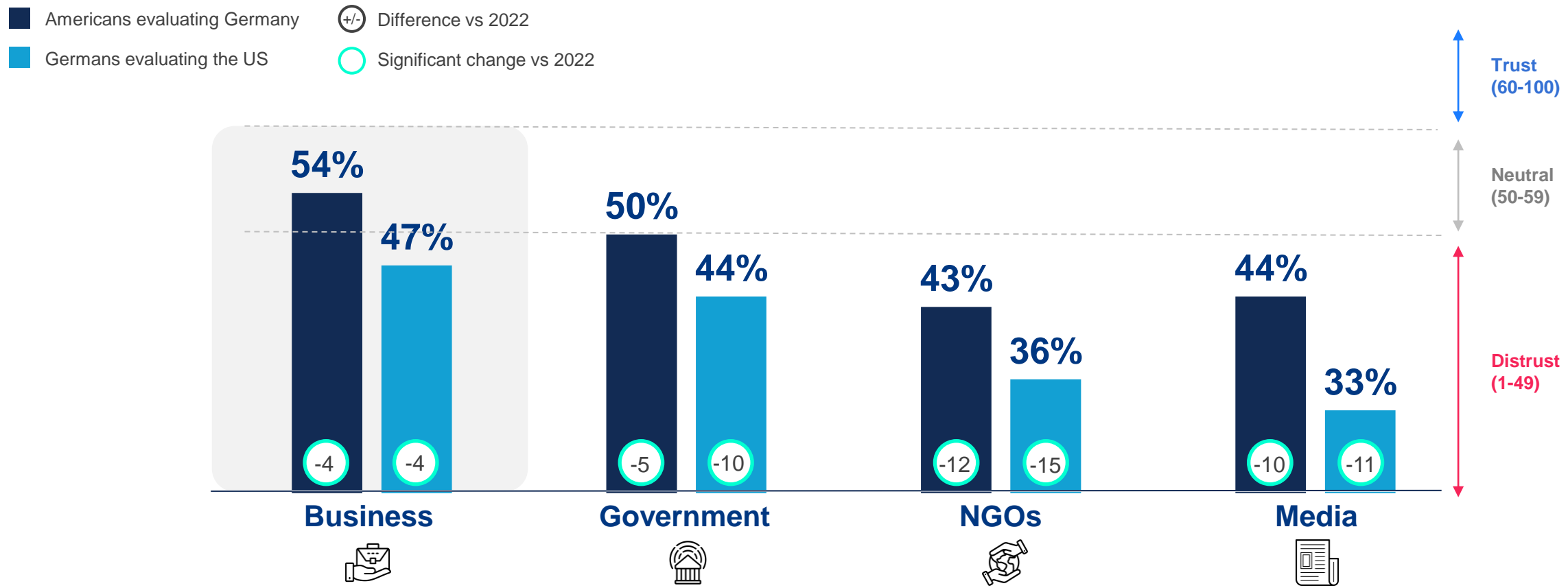
03

Role of institutions in building trust in the German-American partnership

Business is the most trusted across countries.

Americans remain more trusting of German institutions

% of trust in institutions of each other's country



Q9: How much do you trust the following [American/German] institutions to do what is right? | 7-point scale. Top 4 boxes (Trust) Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000. Question source: Edelman Trust Barometer.

Competence and reliability remain the main characteristics of both German and American businesses

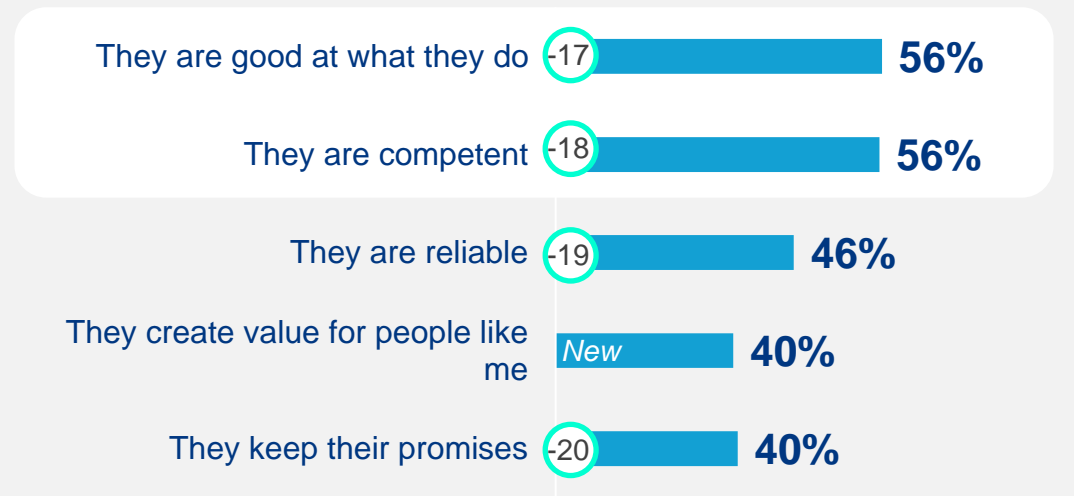
+/- Difference vs 2022 ○ Significant change vs 2022



% of Americans who agree with the following about German businesses Top 5 of 11



% of Germans who agree with the following about American businesses Top 5 of 11



Q13. Now, thinking about [AMERICAN/GERMAN] companies in general, to what extent do you agree or disagree with the following statements? 7-point scale, top 3 (Agree). Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Quality and innovation drive trust in German and American businesses

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

 Difference vs 2022  Significant change vs 2022



Americans' top 3 reasons to **trust** German businesses

% who agree

Quality of their product and services  **84%**

Ability to innovate  **83%**

Historical trade relationships between the two countries  **78%**



Germans' top 3 reasons to **trust** American businesses

% who agree

Quality of their product and services  **76%**

Ability to innovate  **73%**

Dynamism of businesses  **67%**

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 (Trust) percentage trusting businesses. All respondents who trust [AMERICAN/GERMAN] business. Germans who trust American businesses 2022 n=1,005, Americans who trust German businesses 2022 n=1,098 | Germans who trust American businesses n=938, Americans who trust German businesses 2024 n=1,081

Differences in business practices and regulations are common drivers of distrust

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

+/- Difference vs 2022 ○ Significant change vs 2022

Americans' top 3 reasons to **distrust** German businesses % who agree

Historical trade relationships between the two countries -8 **39%**

We don't share common business practices and regulations = **36%**

Different views on free trade -8 **36%**

Germans' top 3 reasons to **distrust** American businesses % who agree

Don't use their economic and financial power responsibly +2 **56%**

Don't share common business practices and regulations +3 **46%**

Don't treat their employees fairly New **43%**

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 (Distrust). percentage distrusting businesses. All respondents who distrust [AMERICAN/GERMAN] business. Germans who distrust American businesses 2022 n=552, Americans who distrust German businesses 2022 n=449 | Germans who distrust American businesses n=523, Americans who distrust German businesses 2024 n=305

Lower opinions of each other's governments. Less than half of Germans think positively of the US government

+/- Difference vs 2022 ○ Significant change vs 2022



% of Americans who agree with the following about German government
Top 5 of 11



% of Germans who agree with the following about American government
Top 5 of 11



Shared values, interests and democratic principles are key trust drivers in the US and German governments

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

+/- Difference vs 2022 ○ Significant change vs 2022

Americans' top 5 reasons to **trust** the German government % who agree



Germans' top 5 reasons to **trust** the US government % 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 (Trust). percentage trusting government. All respondents who trust [AMERICAN/GERMAN] government. | Germans who trust the American government 2022 n=1,055, Americans who trust the German government 2022 n=1,040 | Germans who trust the American government n=885, Americans who trust the German government 2024 n=995

Political misalignment is a common driver of distrust American and German governments

Asked among those who **distrust** the other country's governments

+/- Difference vs 2022 ○ Significant change vs 2022

Americans' top 5 reasons to **distrust** the German government % who agree

Because of our historical relationship -1 **46%**

I am not aligned with its political views -8 **42%**

We don't share common interests and challenges -6 **42%**

We don't share common views of democracy -5 **41%**

We don't share common values -3 **41%**

Germans' top 5 reasons to **distrust** the US government % who agree

Doesn't use its economic and financial power responsibly *New* **60%**

Not able to regulate fairly and transparently -3 **58%**

I am not aligned with its political views = **55%**

We don't share common views of democracy -5 **48%**

We don't share common values -1 **44%**

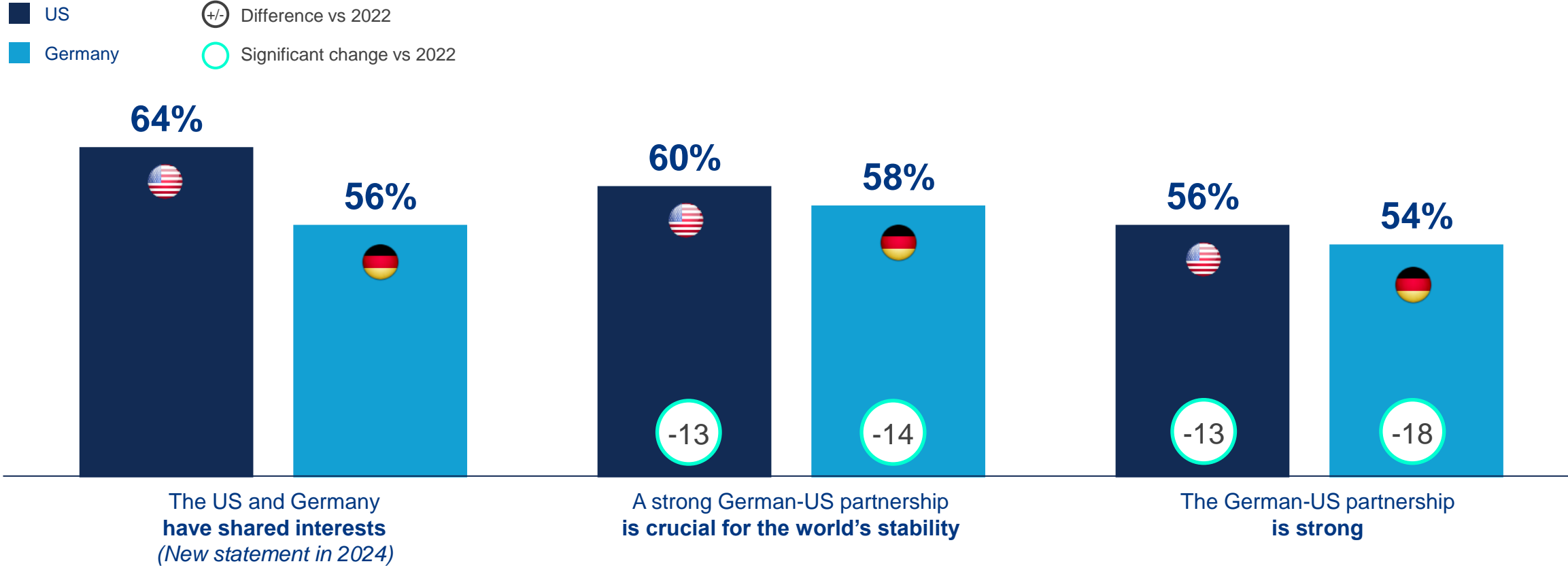
Q12b. Thinking about the [AMERICAN/GERMAN] government, to what extent do you agree or disagree with the following statements? | 7-point scale, top 3 (Distrust). Percentage distrusting government. All respondents who distrust [AMERICAN/GERMAN] government. Germans who distrust the American government 2022 n=634, Americans who distrust the German government 2022 n=579 | Germans who distrust the American government n=732, Americans who distrust the German government 2024 n=401

04

Meeting expectations
to drive trust in the
partnership

Most still think the partnership remains strong and has a key role to play in achieving global stability

% who agree with the following statements about the partnership



Q5: How much do you agree or disagree with the following statements about the partnership between the US and Germany? 7-point scale. Top 3 agree. Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,00

Americans and Germans share a wide range of concerns, including cost of living, conflicts, and lack of consensus



% of Americans concerned about the following
Top 6 of 11

1	Rising cost of living	83%
2	Wars and conflicts around the world	80%
3	The growing lack of willingness to reach compromise and consensus	75%
4	Being misled by false information	74%
5	Rise of extremist political parties and views	73%
6	Growing number of people migrating from their home country due to lack of economic opportunity	72%



% of Germans concerned about the following
Top 6 of 11

1	Wars and conflicts around the world	85%
2	Rising cost of living	81%
3	The growing lack of willingness to reach compromise and consensus	75%
4	Growing number of people migrating from their home country due to lack of economic opportunity	73%
5	Rise of extremist political parties and views	71%
6	Growing polarization across the world	70%

QNEW6: How concerned, if at all, are you about each of the following?
7-point scale, top 3 (Extremely concerned). Total respondents 2024, US n=2,000, Germany n=2,000

Americans and Germans recognize the current focus of the partnership on addressing conflicts

+/- Difference vs 2022 ○ Significant change vs 2022



Top 6 current priorities of the US–German partnership according to Americans

Top 6 of 11



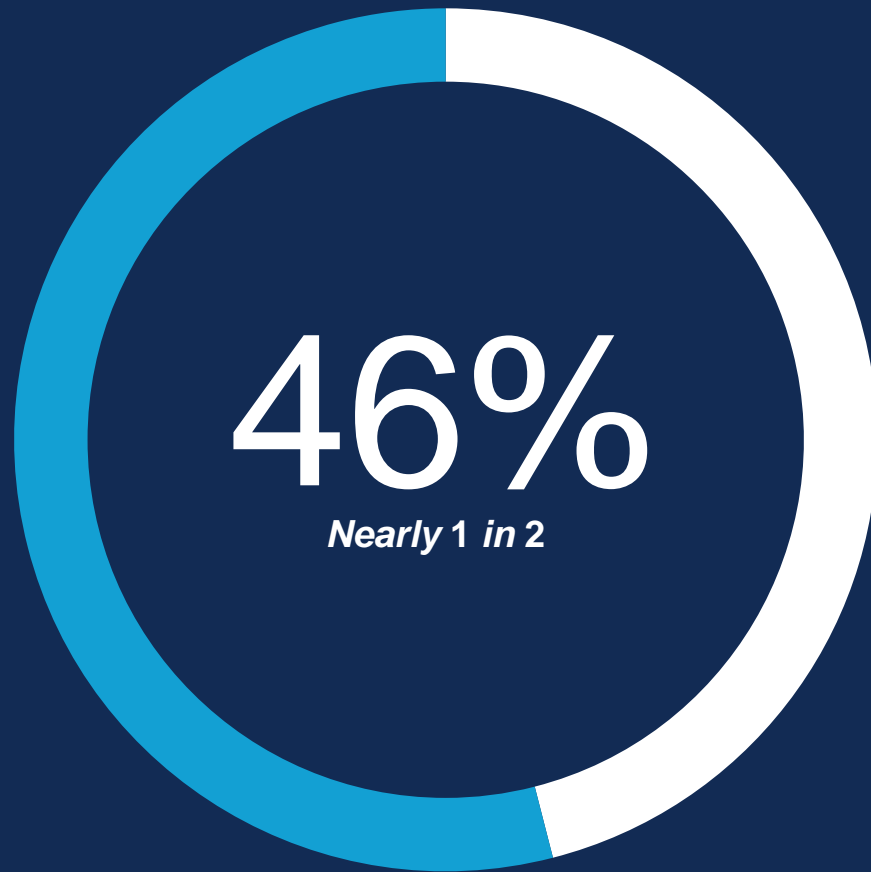
Top 6 current priorities of the US–German partnership according to Germans

Top 6 of 11



Q23: In your opinion, what are currently the top 3 priorities of the transatlantic partnership between the US and Germany? 7-point scale, top 3 (Strongly agree). Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Half believe the partnership addresses issues that are relevant to them personally



*% Agree the partnership
between the US and Germany*

***is relevant to the
issues that are most
important to me***

Q5: How much do you agree or disagree about the following statements about the partnership between the US and Germany?
7-point scale, top 3. (Agree) Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

In addition to countering Russian aggression, there are expectations for actions on climate change, economic growth & human rights

+/- Difference vs 2022 Significant change vs 2022

Top 6 expected priorities of the US–German partnership according to Americans Top 6 of 11



Top 6 expected priorities of the US–German partnership according to Germans Top 6 of 11



Q22: In your opinion, what should be the top 3 priorities of the transatlantic partnership between the US and Germany? 7-point scale, top 3 (Strongly agree). Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Addressing the conflict in Ukraine, promoting free trade and fair regulations would drive trust in both countries



% of Americans saying the following would impact their trust in Germany as a country

Top 5 of 17

Promoting free and fair trade **63%**

Fair regulation **59%**

Closer military and defense relationships with my country **58%**

More partnership with my country to foster innovation **58%**

Firm actions to end war in Ukraine **57%**



% of Germans saying the following would impact their trust in the US as a country

Top 5 of 17

Firm actions to end war in Ukraine **60%**

Firm actions to end war in the Middle East between Israel and Hamas **57%**

Promoting free and fair trade **57%**

Fair regulation **57%**

Concrete actions to address inequalities domestically **56%**

Q17: To what extent would the following events impact your trust in [USA / GERMANY] as a country? 7-point scale, top 3 (More trusting). Total respondents 2024, US n=2,000, Germany n=2,000

An association of governments and businesses should drive the German-American partnership

% of Americans
 ⊕/⊖ Difference vs 2022
 % of Germans saying
 ○ Significant change vs 2022

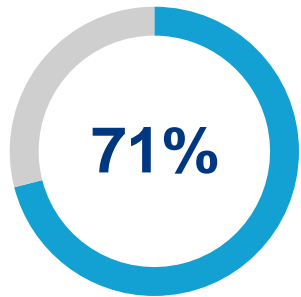


Q21. To what extent do you agree or disagree with the following statements about the transatlantic partnership between the US and Germany? 7-point scale, top 3, (Strongly agree). Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Actions around reskilling, transparency and DE&I would drive trust in transatlantic businesses

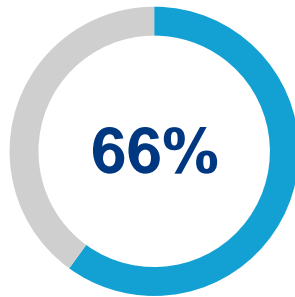
Top 5 priorities for business on both countries

% who agree that German and American businesses...



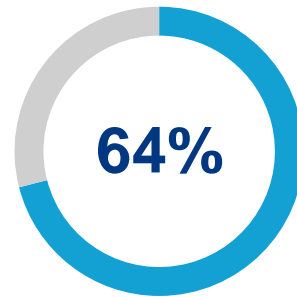
 71%  72%

Should **invest in the skills of their employees** and prepare them for the future



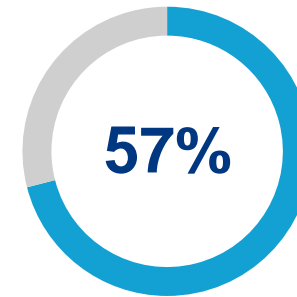
 65%  67%

Need to be **more transparent in how they deal with each other**



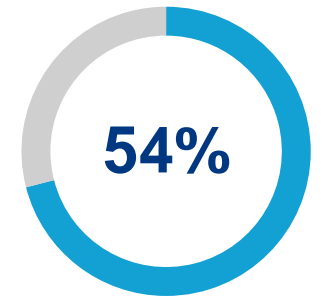
 60%  68%

Should **not be dependent of the governments** in place



 57%  57%

Should **prioritize diversity, equity, and inclusion** at the workplace



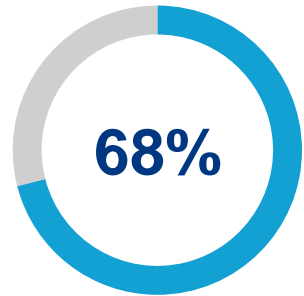
 54%  55%

Are able to **align their long-term goals with their short-term action plans**

More transparency and collaboration on defense & economic security would drive trust in governments further

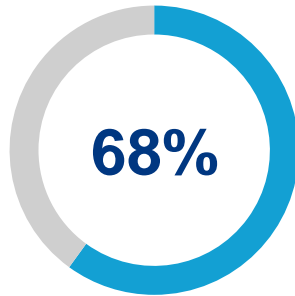
Top 5 priorities for governments on both countries

% who agree that German and American governments...



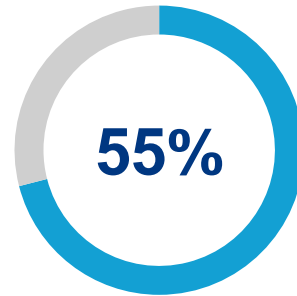
 65%  71%

Need to be **more transparent** in how they deal with each other



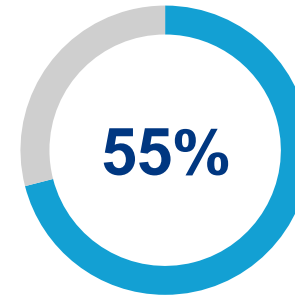
 68%  67%

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



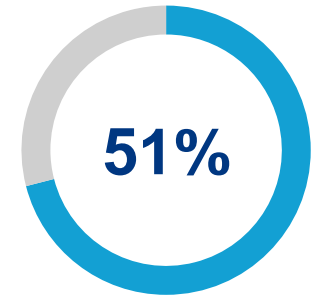
 54%  55%

US and German government's **partnership is key to reduce inequalities in democracies**



 54%  55%

Should **work together to reinforce social stability** in my country



 55%  47%

Are able to **work constructively with each other** no matter who is in power

Achieving both domestic and global improvements should be the key focus of the partnership

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

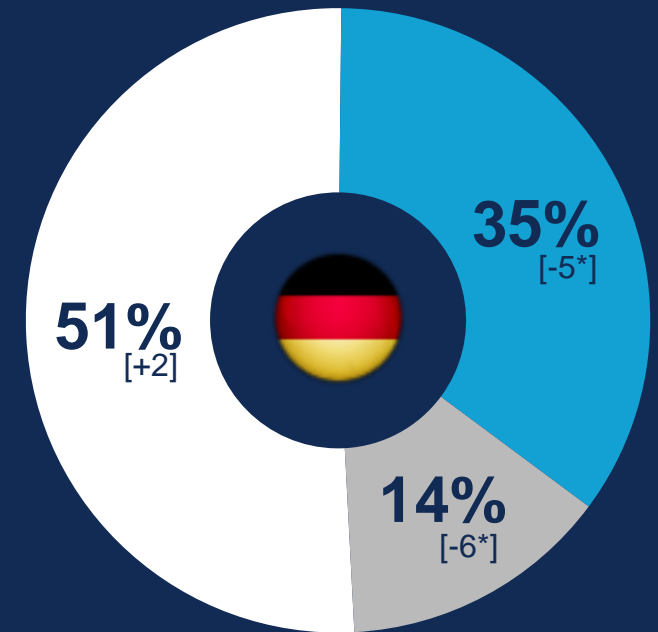
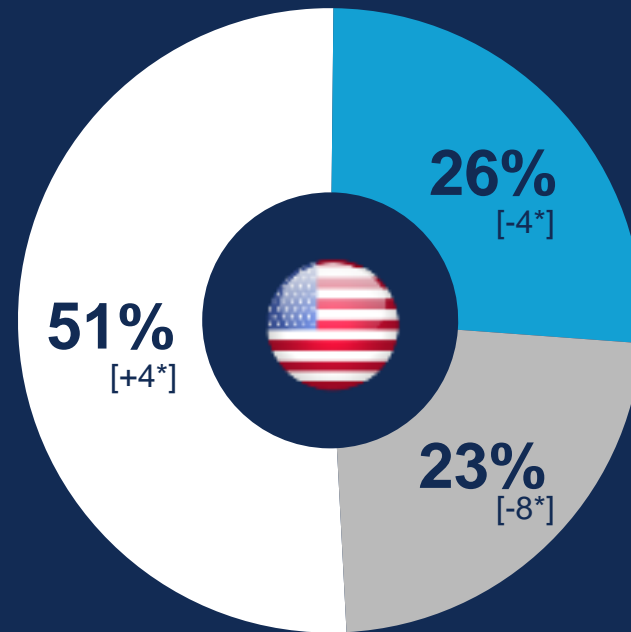
■ Equal focus on both domestic and global improvements

■ Improving the global situation

■ Improving both countries domestically

[] Difference vs 2022

* Significant change vs 2022



Q19. What should the primary purpose of the German-American partnership be?
Total respondents 2022, US n=2,002, Germany n=2,001 | Total respondents 2024, US n=2,000, Germany n=2,000

Executive Summary

- 1 Trust in the German-American partnership has declined since 2022

 - Decline in trust in the partnership is **more evident in Germany**, with people being more skeptical and worried about the partnership.
 - **Optimism** observed two years ago is **waning** with fewer believing the best days of the partnership are ahead and **a large proportion of the population, particularly in the US, not being able to form an opinion.**
 - A growing **lack of willingness to reach compromise and consensus** has dented trust in the other country, as have increased extremism and misinformation.
- 2 Business is the most trusted institution in both countries and must play a key role in the partnership

 - **Businesses on both sides share common strengths** in their competence, reliability, quality, and innovation.
 - Both Germans and Americans expect **an association between governments and businesses to drive the partnership going forward.**
- 3 High expectations of the German-American partnership

 - The partnership **remains strong and plays a crucial role in the world's stability.**
 - People on both sides **share concerns** about the rising cost of living, wars and conflicts, and lack of willingness to reach a consensus.
 - The efforts of the partnership to contain Russian aggression are acknowledged, but **people also expect the partnership to deliver more** on climate change, economic growth, and human rights, in order to be relevant to them personally.
 - **Clear actions**, especially around transparency, are expected from businesses and governments on both sides to further drive trust.

