

In association with the  
Bertelsmann Foundation

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# Support in Principle for U.S.-EU Trade Pact

*But Some Americans and Germans  
Wary of TTIP Details*

**FOR FURTHER INFORMATION  
ON THIS REPORT:**

Bruce Stokes, Director of Global Economic Attitudes  
Russ Oates, Communications Manager

202.419.4372

[www.pewresearch.org](http://www.pewresearch.org)

## About the Report

This Pew Research Center report, in association with the Bertelsmann Foundation, examines American and German attitudes toward trade at a time when the United States and European Union are negotiating a free trade agreement, the Transatlantic Trade and Investment Partnership (TTIP). This report is based on telephone surveys in the United States and Germany. In the U.S., interviews were conducted February 27 to March 2, 2014 among a national sample of 1,002 adults, 18 years of age or older. In Germany, interviews were conducted February 25-26, 2014 among a national sample of 953 persons, 18 years of age or older.

The report is a collaborative effort based on the input and analysis of the following individuals from the Pew Research Center:

Bruce Stokes, *Director of Global Economic Attitudes*

Richard Wike, *Director of Global Attitudes Research*

James Bell, *Director of International Survey Research*

Claudia Deane, *Director, Research Practice*

Bruce Drake, *Senior Editor*

Jacob Poushter, *Research Associate*

Neha Sahgal, *Senior Researcher*

Kat Devlin, *Research Assistant*

Aaron Ponce, *Research Associate*

Steve Schwarzer, *Visiting Research Methodologist*

Katie Simmons, *Senior Researcher*

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Our work reflects the principles of the Bertelsmann Stiftung, one of Europe's largest foundations. The Stiftung was founded in 1977 by Reinhard Mohn, who, as head of Bertelsmann AG, turned the publishing house into a leading international media group. The Stiftung's activities are guided by the principle that ownership of capital brings an obligation to contribute to society. Since its inception, the Stiftung has invested more than US\$ 1 billion in more than 700 projects. The Stiftung is headquartered in the northern German town of Gütersloh and has opened other branches in Brussels and Barcelona. The Washington, DC-based Foundation is part of this network.

Reinhard Mohn endowed the Stiftung with a majority shareholding in Bertelsmann AG, now Bertelsmann SE & Co. KGaA. Most funding for the Foundation's projects comes from that gift.

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# Support in Principle for U.S.-EU Trade Pact

## *But Some Americans and Germans Wary of TTIP Details*

The European Union and the United States are negotiating the most economically significant regional free trade agreement in history: the Transatlantic Trade and Investment Partnership (TTIP). Publics in Germany and the United States support TTIP and trade expansion in general, especially with each other.

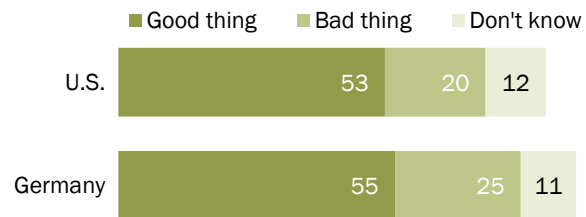
But when it comes to specifics, both Americans and Germans oppose many details of this far-reaching initiative. Moreover, they disagree with one another on making transatlantic regulatory standards similar. And, in the United States, there is a striking generation gap in attitudes relating to TTIP.

Motivations for backing the deal also differ. Americans, more than Germans, are somewhat more likely to support this trade agreement as part of a broader effort to boost competitiveness with China.

These are among the main findings of two parallel Pew Research Center surveys conducted among 953 people in Germany from February 25 to February 26, 2014 and 1,002 people in the United States from February 27 to March 2, 2014. All interviews were done by telephone. The survey was conducted in partnership with the Bertelsmann Foundation, the North American arm of the Bertelsmann Stiftung, a German foundation that promotes international understanding.

### Americans, Germans Back TTIP

% think TTIP will be \_\_\_ for country



14% of Americans and 8% of Germans "Haven't heard enough", 2% of Americans and 1% of Germans say neither.

Source: Pew Research Center - Bertelsmann Foundation survey. Q3.

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### Less Support for TTIP Goals, Disagreement on Similar Standards

% support ...

	U.S.	Germany
	%	%
Making American and European standards for products and services similar	76	45
Removing all duties on goods imported from Germany/U.S.	41	38
Removing all investment restrictions between U.S. and EU	39	41

Source: Pew Research Center - Bertelsmann Foundation survey. Q7a-c.

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By more than two-to-one, Germans (55% to 25%) and Americans (53% to 20%) say TTIP will be good for their countries. There is no partisan divide in support for TTIP between adherents of the major German political parties, but more Democrats (60%) than Republicans (44%) in the United States back the deal.

And while there is no generation gap on this issue in Germany, young Americans (67%), those ages 18 to 29, are significantly more in favor of TTIP than their elders (45%), age 50 and older.

Support for TTIP in principle does not translate into majority backing for some of the key objectives of the negotiation. The TTIP talks are multifaceted. They aim to reduce or eliminate tariffs on all merchandise trade across the Atlantic. Another goal is to remove restrictions on transatlantic investment. And, for the first time in any bilateral trade agreement, TTIP involves an attempt to come up with common technological and regulatory standards for the transatlantic marketplace, wherever possible.

Only 38% of Germans and 41% of Americans support the removal of all tariffs on the transatlantic shipment of goods. Just 41% of Germans and 39% of Americans back the elimination of restrictions on transatlantic foreign investment. And Germans and Americans sharply disagree over the most ambitious TTIP objective: making transatlantic regulatory standards as similar as possible. While Americans support such an effort by a margin of four-to-one (76% to 18%), just 45% of Germans agree.

A consistent generation gap also exists in the United States around the details of a U.S.-EU free trade agreement. Young people are more predisposed than older Americans to support removing investment barriers and eliminating tariffs. Roughly eight-in-ten Americans under age 30 also back the idea of making product and service standards as similar as possible between the U.S. and EU, perhaps not surprising given the fact that this generation is far less trusting than their parents and grandparents of the U.S. government's ability to set strong safety and privacy standards.

### Younger Americans: Higher Backing for TTIP, Lower Support for U.S. Standards

	18-29	30-49	50+	Youngest-oldest gap
<i>% good thing for country</i>	%	%	%	
Transatlantic Trade and Investment Partnership	67	55	45	<b>+22</b>
<i>% support...</i>				
Removing investment restrictions	49	40	35	<b>+14</b>
Removing duties on imports	45	48	35	<b>+10</b>
Making product standards as similar as possible	81	80	71	<b>+10</b>
<i>% trust American...</i>				
Environmental safety standards	41	61	69	<b>-28</b>
Food safety standards	54	67	75	<b>-21</b>
Data privacy standards	41	51	52	<b>-11</b>
Auto safety standards	51	51	60	<b>-9</b>

Source: Pew Research Center - Bertelsmann Foundation survey. Q3, Q4a-d, Q7a-c.

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Revelations of spying by the U.S. National Security Agency, including listening in on phone calls made by German Chancellor Angela Merkel, also may have impacted German and American views on regulation of data privacy.

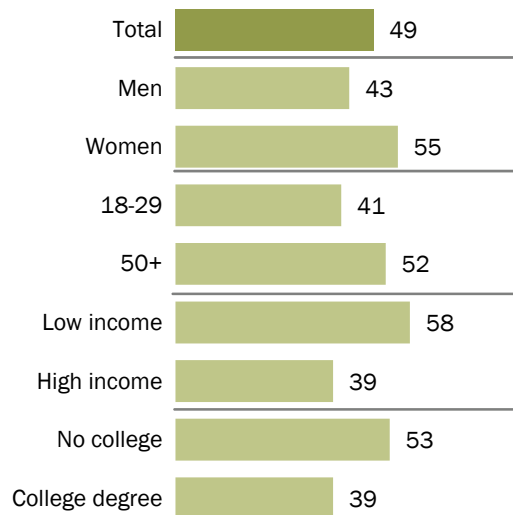
A significant share (85%) of Germans prefers European regulation of data privacy, trusting more in their own government's capacity in this realm than in U.S. regulation. And, in the United States, men, the young, those with a college degree and high-income persons disproportionately lack faith in American standards protecting their data's confidentiality. Overall, roughly half (49%) of Americans trust U.S. privacy standards. But only about four-in-ten high-income Americans (39%) share that trust compared with nearly six-in-ten low-income people (58%), a 19 percentage point difference in views. There is a similar 14 point divide on the issue between those who have graduated from college (39%) and those without a college degree (53%).

Overall, TTIP's broad goal is to boost transatlantic trade and investment. More than seven-in-ten Americans and Germans see increasing U.S.-EU trade as beneficial, with nearly eight-in-ten Americans supportive of more trade with Germany in particular.

However, Americans are, in general, more approving than Germans when it comes to transatlantic investment. Two-thirds of Americans (66%), but only roughly half of Germans (49%), say that greenfield investment, when foreigners build new factories in their country, helps the nation. But nearly three-quarters of Germans (73%) and more than half of Americans (56%) say foreign mergers and acquisitions (where a European corporation buys an existing American one or a U.S. company acquires a German firm) hurt the country.

## In the U.S., Many Lack Trust in American Privacy Protection

*% trust American data privacy standards more than European standards*



Source: Pew Research Center - Bertelsmann Foundation survey. Q4b.

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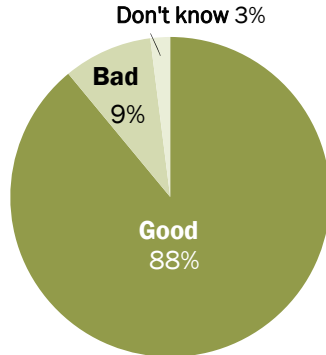
## Trade Is Good

Americans and Germans believe that growing trade between their country and other nations is a good thing. Nearly nine-in-ten Germans (88%) and roughly seven-in-ten Americans (71%) hold such positive views about international commerce. Only 9% of Germans but 23% of Americans voice the view that trade is bad for their country. Such findings comport with past [Pew Research surveys](#) that show publics in both countries back trade in principle.

But Germans are somewhat stronger supporters of international commerce. Roughly a third (34%) say trade is a *very* good thing, compared with around a quarter (26%) of Americans who hold such intense views.

### Germans Overwhelmingly Support Trade

*% trade between Germany and other countries is ...*

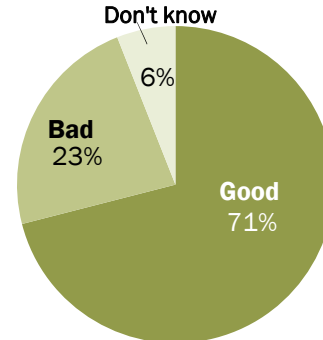


Source: Pew Research Center - Bertelsmann Foundation survey, Q1.

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### Most Americans View Trade as Good

*% trade between U.S. and other countries is ...*



Source: Pew Research Center - Bertelsmann Foundation survey, Q1.

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German and American men are more likely to say trade is a *very* good thing than are their female compatriots. High-income individuals and those with a college degree in both nations are more likely than those with a low income and without a college degree to take the view that trade is *very* good for their country.

Americans and Germans generally share the view that increasing trade with a range of other countries would be beneficial. But they differ somewhat on the value of such commerce when it comes to specific prospective trading partners.

The United States and the European Union are each other's largest merchandise trading partners. In 2013, bilateral commerce totaled \$649 billion, according to U.S. government data. In that trade, America is Germany's fourth biggest export market and source of imports. And Germany is the fifth largest trading partner of the United States.

Given such extensive transatlantic commerce, it is hardly surprising that, in principle, Americans and Germans overwhelmingly support more bilateral trade and endorse the broad objective of the Transatlantic Trade and Investment Partnership.

## Germans Back Trade More Intensely than Americans

*% saying growing trade with other countries is very good*

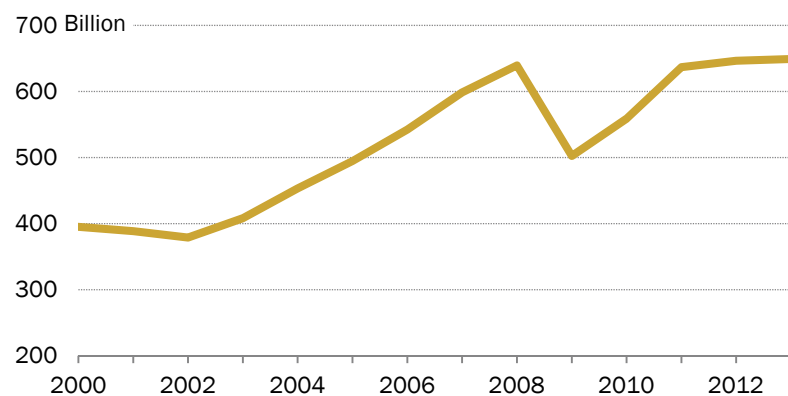
	Germany %	U.S. %	Diff.
<b>Total</b>	34	26	<b>+8</b>
Men	48	32	<b>+16</b>
Women	22	20	<b>+2</b>
18-29	31	30	<b>+1</b>
30-49	38	27	<b>+11</b>
50+	33	23	<b>+10</b>
No college	32	22	<b>+10</b>
College degree	51	36	<b>+15</b>
Low income	26	22	<b>+4</b>
Middle income	31	22	<b>+9</b>
High income	46	35	<b>+11</b>

Source: Pew Research Center - Bertelsmann Foundation survey. Q1.

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## Transatlantic Trade on the Rise

*Total annual trade in goods between U.S. and EU in billions of U.S. dollars*



Source: U.S. Census International Trade Data.

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Three-quarters (75%) of Germans say increased trade with the United States would be good for Germany. But just 18% say it would be *very* good. And 79% of Americans say increased commerce with Germany would be good for the United States. And, among these respondents, 29% say more German-American trade would be *very* good.

In addition, roughly seven-in-ten (72%) Americans agree that more exports and imports with the European Union would be beneficial to the United States. Roughly twice as many men (29%) as women (15%), Americans with a college degree (36%) versus those without such a degree (16%), and high-income people (31%) versus low-income individuals (15%) say more U.S.-EU trade would be *very* good.

Both Germans and Americans see benefit for their countries in boosting trade with many other nations.

Japan is currently Germany's 15th largest trading partner and the EU's seventh biggest trading relationship. Japan is the fourth largest U.S. trading partner and Washington is currently engaged in negotiations with Tokyo to include Japan in the Trans-Pacific Partnership (TPP), a regional free trade agreement.

In Germany and the United States publics are overwhelmingly supportive of increasing trade with Japan. Nearly eight-in-ten (79%) Germans say increased commerce with Japan would be good for Germany, while roughly three-quarters (74%) of Americans say more U.S. trade with Japan would be beneficial for their country.

Germans and Americans also see eye-to-eye on increasing commerce with Brazil. That Latin American emerging market is currently the EU's ninth largest trading partner but only Germany's 22<sup>nd</sup>. Brazil is the ninth biggest U.S. trading relationship. Roughly two-thirds of Germans (67%) and Americans (64%) approve of boosting trading with Brazil, although - more so than with other nations - people are also likely to have no opinion on the matter.

However, when it comes to trade with China and Russia, German and American views diverge.

China is America's second biggest trading partner, the EU's second largest trading relationship and Germany's number three international commercial partner. A strong majority of Germans

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## Americans, Germans See More Trade with Most Countries as Good Thing

*% saying increased trade with \_\_\_\_\_ would be a good thing*

	Americans %	Germans %
United States	--	75
Germany	79	--
Japan	74	79
EU	72	--
Brazil	64	67
China	51	63
Russia	47	64

Source: Pew Research Center - Bertelsmann Foundation survey. Q2a-g.

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(63%) but only about half of Americans (51%) say more trade with China would be beneficial to their country. Moreover, nearly three times as many Americans (20%) as Germans (7%) voice the view that more commerce with the People's Republic would be *very* bad.

Publics in Germany and the United States are also divided over more trade with China along generational and gender lines. More than seven-in-ten German men (73%) and more than half (56%) of American men, but just 52% of German women and 46% of U.S. women, favor more commerce with China. Similarly, 72% of Germans ages 18 to 29 and 59% of young Americans back more trade with China, while 61% of Germans 50 years of age and older and only 45% of older Americans agree. Such differences in sentiment may reflect the fact that, in 2013, the U.S. trade deficit with China was 36 times greater than Germany's imbalance with China. The United States ran a \$318.4 billion trade deficit with China, while Germany had just an \$8.8 billion (€6.4 billion) shortfall.

More than six-in-ten (64%) Germans say increasing trade with Russia, its fourth largest trading partner outside the EU, would be a good thing. (The Pew Research Center survey was in the field during Russian military movement into the Crimea.) Just 47% of Americans would like to boost commerce with Russia.

## Support for TTIP in Principle, Less Support on Details

Reflecting German and American support for increased bilateral commerce, more than half the publics in the United States (53%) and in Germany (55%) say that the Transatlantic Trade and Investment Partnership would be good for their country. Support for TTIP is shared by men and women, those with a college degree and those without a college degree. It is also shared across income groups in the United States. But high-income Germans (66%) are more likely to support TTIP than low-income ones (49%). Notably, however, more than one-in-four Americans (28%) and nearly one-in-five Germans (19%) volunteered they had either not heard enough about the negotiation, saw it as neither good nor bad, or did not know how they felt.

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### Americans See China as Major Rationale for TTIP

*% most important reason TTIP is good for country\**

	<b>Germans</b>	<b>Americans</b>
	%	%
Will help country be more competitive with China	32	43
Will help economy	34	32
Will strengthen ties between U.S. and EU	30	22

\*Based on those who said free trade agreement is a good thing.

Source: Pew Research Center - Bertelsmann Foundation survey. Q8.

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Americans and Germans express a range of rationales for supporting TTIP, with no single motivation predominating. About a third of respondents in both countries who think a U.S.-EU trade agreement is a good thing say it will help their economies. More Germans than Americans say it will strengthen ties between the United States and the European Union.

Notably, Americans are much more likely than Germans to say that they think TTIP is good for their country because it will help their nation to be more competitive with China. (For more on American and German attitudes toward China see this Pew Research Center [report](#).) About half (52%) of Americans age 50 and older who support the agreement see China as a motivation for TTIP.

The TTIP negotiation is multifaceted. It aims to reduce or eliminate tariffs on all merchandise trade across the Atlantic. Another goal is to remove restrictions on transatlantic investment. And, for the first time in any bilateral trade agreement, TTIP involves an attempt to come up with common technological and regulatory standards for the transatlantic marketplace, wherever possible.

Roughly half the U.S. public (49%) opposes removing all duties that increase the price of goods imported from the European Union. And a majority of the German public (57%) opposes removing tariffs on products imported from the United States. However, German resistance to duty elimination is muted. Most of those in opposition (47%) say they are *somewhat*, not strongly, opposed.

About half of Germans (53%) and Americans (49%) also oppose lifting investment restrictions between the United States and the European Union. Again, German opposition is mild.

In addition, Germans and Americans are of two minds about the beneficial nature of foreign investment, with brick-and-mortar investments acceptable to publics in both countries, while takeovers by foreigners are largely unacceptable.

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### More Opposition Than Support for Goals, But Americans Back Similar Standards

	Support	Oppose
	%	%
<b>Germans</b>		
Making European and American standards as similar as possible	45	51
Removing all restrictions on investment between U.S. and EU	41	53
Removing all duties that increase the price of goods imported from U.S.	38	57
<b>Americans</b>		
Making European and American standards as similar as possible	76	18
Removing all restrictions on investment between U.S. and EU	39	49
Removing all duties that increase the price of goods imported from EU	41	49

Source: Pew Research Center - Bertelsmann Foundation survey. Q7a-c.

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Two-thirds (66%) of Americans say that European companies building factories in the United States will mostly help the U.S. economy. Men (71%) more than women (62%) support such greenfield investment. And, there is strong support for it among Americans with at least a college degree (84%). A smaller proportion of Germans, roughly half (49%), express the view that American firms building plants in Germany will benefit the local economy. Men (55%) are more supportive than women (43%), as are Germans age 18 to 29 (55%) compared with people 50 years of age and older (44%). German ambivalence about such new U.S. investment may stem from a distrust of American business practices. A 2012 Pew Research Center [survey](#) found that nearly two-thirds of Germans (65%) disliked American ways of doing business.

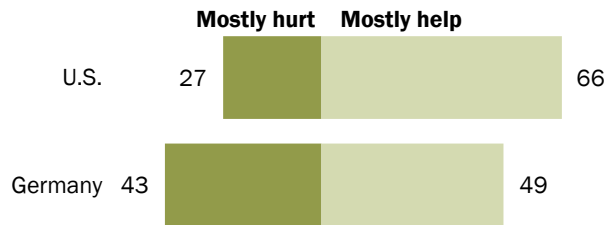
Foreign-led mergers and acquisitions of German companies are decidedly unpopular. Just 19% of Germans say such foreign investment helps Germany, 73% say it hurts.

Meanwhile, Americans are not that much more enthusiastic about foreigners buying U.S. firms. Just 31% back European takeovers, 56% oppose them. Moreover, women (61%) are more opposed than men (51%), and those without a college degree (59%) are more likely than those with a college degree (49%) to say such investment hurts America.

Some of the biggest differences between Americans and Germans involve the most ambitious TTIP negotiating objective: common regulatory standards.

### Foreigners Building Factories Help

*% European/American companies \_\_\_\_\_ the economy when building factories in U.S./Germany\**



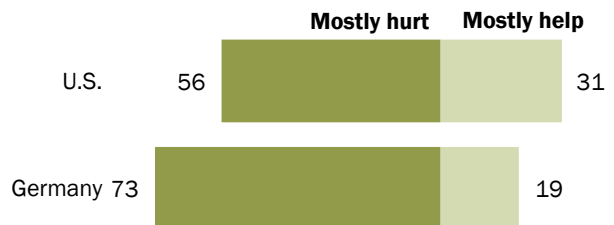
\*U.S. results based on half sample asked about European companies. N = 523.

Source: Pew Research Center - Bertelsmann Foundation survey. Q5 & Q5f1.

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### Foreigners Buying Companies Opposed

*% European/American companies \_\_\_\_\_ the economy when buying American/German companies\**



\*U.S. results based on half sample asked about European companies. N = 523.

Source: Pew Research Center - Bertelsmann Foundation survey. Q6 & Q6f1.

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Roughly three-quarters of Americans (76%) support making American and European standards for products and services as similar as possible. This includes 35% who strongly back such efforts. Only 18% oppose similar standards. But just 45% of Germans support commonality, including just 13% who *strongly* back such an effort. And 51% of Germans oppose it.

German reluctance to support similar transatlantic regulatory standards is driven by an overwhelming German preference for European regulations. On a range of consumer issues, Germans simply trust European regulatory norms more than American ones.

For their part, Americans put more trust in U.S. standards, but their support is not nearly so lopsided.

Washington and Brussels have long been at odds over the safety of genetically modified organisms (GMO) used in America – such as those in soybeans – and over the safety of U.S.-raised poultry and meat. The depth of that divide is evident in contrasting German and American sentiment. More than nine-in-ten Germans (94%) trust European food-safety standards while just 2% trust American regulations. Two-thirds of Americans (67%) trust U.S. standards.

The United States is the world's second-largest producer of motor vehicles. Germany is the fourth-largest manufacturer. Their publics each prefer their own auto safety regulations. But German confidence is greater. About nine-in-ten Germans (91%) trust German auto-safety standards more than U.S. ones. More than half of Americans (55%) trust U.S. standards more, although a third have greater trust in European regulations.

Revelations of U.S. National Security Agency spying on phone and email traffic have been sharply criticized by German pundits and politicians. This contretemps comes after years of transatlantic disagreement over commercial data collection and the movement of that information across borders, often by Wall Street financial service firms and Silicon Valley information technology companies. In the wake of such disputes, 85% of Germans trust European rather than U.S. data privacy standards. Barely half of Americans (49%) trust their own country's confidentiality

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## Americans, Germans Prefer Own Standards

% trust American/European standards for \_\_\_\_\_

	U.S.		Germany	
	European standards %	American standards %	European standards %	American standards %
Auto safety	33	55	91	4
Data privacy	29	49	85	3
Environmental safety	27	60	96	2
Food safety	22	67	94	2

Source: Pew Research Center - Bertelsmann Foundation survey, Q4a-d.

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standards, although 23% of Americans trust neither European nor U.S. standards, or have no opinion.

Finally, on environmental safety, 96% of Germans prefer European standards, while 60% of Americans back U.S. norms.

Notably, age, income and education influence American trust in U.S. standards. Overall, young Americans, those age 18 to 29, are less likely to have faith in U.S. regulation than are people 50 years of age and older. And, in the case of environmental safety and data privacy standards, young Americans are actually divided over whether they prefer U.S. or European standards. High-income individuals generally trust U.S. standards, but to a lesser degree than low-income Americans. In the case of data privacy and auto safety, they are divided on whether they trust European or U.S. regulation. People with a college degree are less likely to trust U.S. standards than those with no college degree.

## The Trans-Pacific Partnership

TTIP is being negotiated at the same time as the Trans-Pacific Partnership (TPP), a free trade deal between Washington and eleven countries in Asia and Latin America. A similar proportion of Americans (55%) are supportive of the transpacific agreement as support TTIP (53%). One-in-five Americans (20%) oppose TTIP and one-in-four (25%) oppose TPP. While 19% of respondents say they had not heard of or had no opinion about the transpacific agreement, 28% expressed no view on the proposed European accord.

Moreover, there is a partisan divide on both TTIP and the transpacific agreement. Fully 60% of Democrats say TTIP is good for the United States, but only 44% of Republicans agree. At the same time, 59% of Democrats back the transpacific accord, but only 49% of the GOP supports it. This partisan divide, in which Democrats are more supportive of trade than Republicans, runs counter to conventional wisdom in the United States and abroad that Democrats are protectionists and Republicans are free traders. However, such assumptions about partisan views on trade are not borne out by Pew Research [surveys](#) that have shown for some time that Democrats are more supportive than Republicans of growing trade and business ties between the United States and other countries.

## Democrats More Supportive of Trade Deals than Republicans

*% saying \_\_\_\_ a good thing*

	Total %	Rep %	Dem %	Ind %	R-D Diff
Transatlantic Trade and Investment Partnership	53	44	60	53	-16
Trans-Pacific Partnership	55	49	59	56	-10

Source: Pew Research Center - Bertelsmann Foundation survey. Q3 & Q9.

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Young Americans (65%) are more likely than older ones (49%) to say TPP will help the United States. (Such findings comport with earlier [Pew Research results](#) showing that young Americans think Asia is more important to the United States than Europe. Older Americans think its Europe.)

Notably, public support for both TTIP and the Trans-Pacific Partnership agreements generally exceeds public backing for the North American Free Trade Agreement during the time it was being negotiated, according to numerous [polls](#) in 1992 and 1993.

## Germans' EU Skepticism

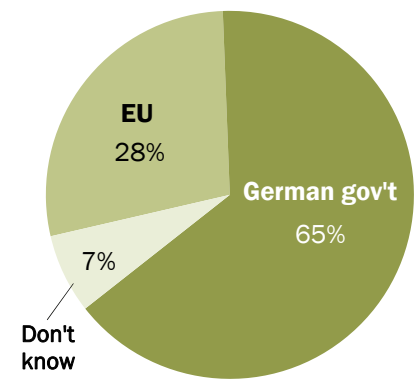
Finally, TTIP is being negotiated at a time of rising anti-EU sentiment across Europe, including in Germany. A growing number of people are questioning some of the founding principles of the European Union (see the 2013 Pew Research Center [report on the topic](#)), including the right of the European Commission to negotiate all trade agreements for EU member states.

Asked whether the European Union should negotiate international trade agreements on behalf of Germany or should the German government negotiate trade accords for Germany, by more than two-to-one (65% to 28%) Germans say Berlin not Brussels should be the negotiator. Support for this reassertion of the nation state's role in international commercial agreements is particularly strong (73%) among members of the Christian Democratic Union, Christian Social Union and the Free Democratic Parties. Backing for returning this authority to Berlin is strong, but somewhat less so (60%), among members of the Social Democratic Party.

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### Germans Want Germans to Negotiate Trade Deals

*% agree \_\_\_\_\_ should negotiate international trade agreements for Germany*



Source: Pew Research Center - Bertelsmann Foundation survey. Q10.

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# Overcoming TTIP's Double Deficit

## Commentary by the Bertelsmann Foundation

Ambitious in scope, the Transatlantic Trade and Investment Partnership (TTIP) currently being negotiated by the United States and European Union could be the world's largest regional free-trade agreement. It could even re-define the trans-Atlantic relationship.

Since the negotiations' inception, they have been subject to a wide range of German news coverage. In the US, it's been a different story. A potential deal has garnered little attention outside Washington, DC. In both cases, this is causing additional challenges for negotiators.

The Bertelsmann Foundation and the Pew Research Center consequently partnered to survey public perceptions of TTIP by looking at Germans' and Americans' attitudes towards international trade. The poll's results show that TTIP suffers from a "double deficit": There is a lack of understanding and a lack of trust. The survey helps reveal the information gaps and expose the different perceptions among experts, negotiators and the broader public. More transparency and dialogue could enable politicians to build a mandate to unleash TTIP's economic potential by taking into account the serious concerns in society about an agreement.

### *Lack of Understanding*

Overall, strong majorities in the United States and Germany support international trade, while smaller majorities believe TTIP would be good for their respective countries. Support in the US, however, varies across generational and political lines. Democrats back TTIP more than Republicans, indicating that the Democrats' traditional apprehension of free trade may be waning. Additionally, younger Americans are more enthusiastic about an agreement than those over 50 years of age. This support may emanate from greater travel opportunities and the global exposure that social media and the Internet offer.

Contradictions among Germans and Americans on TTIP's contours, however, suggest a greater lack of knowledge of the agreement than their general support of it may indicate. On the issue of removing trade and investment barriers between the United States and the European Union (two of TTIP's primary goals), many Germans and Americans oppose eliminating duties on goods from the other side of the Atlantic.

Many Germans and Americans also oppose removing some investment barriers. While majorities are against transatlantic merger-and-acquisition activity, two-thirds of Americans and one-half of Germans believe that transatlantic greenfield investment would be economically beneficial. This suggests an incongruity between the public's perception of investment and TTIP's impact on it.

While any democratic society would show a range of views on trade issues, the variety of opinions reflected in this survey indicates that more transparency can help build support for the TTIP process and could be a good basis for an evidence-based dialogue in society on both sides of the Atlantic.

### *Lack of Trust*

The survey results also suggest that both sides must overcome a significant trust deficit to rally public support for TTIP. Germans overwhelmingly have faith in European standards over American standards. Most Germans prefer European standards on food safety, environmental protection, auto safety and data privacy. Americans also predominantly favor their own standards, albeit by smaller majorities. Most Americans prefer US auto-, food- and environmental-safety standards.

A trust deficit also arises within Europe. Only a minority of Germans agrees that the European Union should negotiate international trade deals on their behalf. The majority wants Berlin to do it. This disparity may have two explanations. It may indicate that Germans are largely unaware that negotiating free-trade agreements is an exclusive competency of the European Commission. It may also suggest that Germans generally distrust EU institutions and are skeptical of the Commission's ability or desire to negotiate in the Germans' best interests.

Finally, the attitudes of Germans and Americans reflected in the survey suggest that negotiators and officials are failing to provide a convincing case for TTIP's necessity. "Jobs and growth" has often been the common refrain used to bolster support for TTIP. Yet public discourse is dominated by the potential sticking points of an agreement, particularly agricultural and data-privacy issues. Evidence-based dialogue is necessary to assess the real value of different standards, and to validate those standards in the context of their potential for economic growth.

## Survey Methods

**Pew Research Center**  
**In association with the Bertelsmann Foundation**  
**February - March 2014 Survey**

This report is based on telephone surveys in the United States and Germany.

In the U.S., interviews were conducted February 27 to March 2, 2014 among a national sample of 1,002 adults, 18 years of age or older, living in the continental United States (500 respondents were interviewed on a landline telephone, and 502 were interviewed on a cell phone, including 272 who had no landline telephone). Interviews were done in English and Spanish. The survey was conducted by interviewers at Princeton Data Source under the direction of Princeton Survey Research Associates International. Statistical results are weighted to account for probability of being included in the sample and to correct known demographic discrepancies. The margin of sampling error for the complete set of weighted data is  $\pm 3.6$  percentage points.

In Germany, interviews were conducted February 25-26, 2014 among a national sample of 953 persons, 18 years of age or older, living in the Federal Republic of Germany (761 respondents were interviewed on a landline telephone and 192 were interviewed on a cell phone). Interviews were exclusively conducted in German. The survey was conducted by interviewers employed and supervised by TNS Emnid, Bielefeld. Statistical results are weighted to account for probability of being included in the sample and to correct known demographic discrepancies. The margin of sampling error for the complete set of weighted data is  $\pm 4.2$  percentage points.

## **Topline Results**

**Pew Research Center**

**In association with the Bertelsmann Foundation**

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Methodological notes:

- Survey results are based on national samples. For further details on sample designs, see Survey Methods section.
- Due to rounding, percentages may not total 100%. The topline “total” columns show 100%, because they are based on unrounded numbers.

Q1 What do you think about growing trade between [GERMANY: Germany / U.S.: the U.S.] and other countries – do you think it is a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	26	45	14	9	6	100
Germany	34	54	7	2	3	100

Q2a Now thinking about U.S. trade with particular countries. Do you think increased trade with a. the European Union would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	22	50	13	5	9	100

Q2b Now thinking about German trade with particular countries. Do you think increased trade with b. the United States would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
Germany	18	57	18	5	3	100

Q2c Now thinking about [GERMANY: German / U.S.: U.S.] trade with particular countries. Do you think increased trade with c. China would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	16	35	25	20	4	100
Germany	16	47	27	7	4	100

Q2d Now thinking about [GERMANY: German / U.S.: U.S.] trade with particular countries. Do you think increased trade with d. Japan would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	29	45	14	8	5	100
Germany	21	58	14	3	4	100

Q2e Now thinking about [GERMANY: German / U.S.: U.S.] trade with particular countries. Do you think increased trade with e. Brazil would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	17	47	16	6	13	100
Germany	14	53	19	3	11	100

Q2f Now thinking about [GERMANY: German / U.S.: U.S.] trade with particular countries. Do you think increased trade with f. Russia would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?						
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	12	35	27	19	7	100
Germany	13	51	27	5	4	100

	Q2g Now thinking about U.S. trade with particular countries. Do you think increased trade with g. Germany would be a very good thing, somewhat good, somewhat bad or a very bad thing for our country?					
	Very good	Somewhat good	Somewhat bad	Very bad	DK/Refused	Total
United States	29	50	9	5	7	100

	Q3 As you may know, the U.S. and the EU are negotiating a free trade agreement called the Transatlantic Trade and Investment Partnership, or TTIP. Do you think this trade agreement will be a good thing for our country or a bad thing?					
	Good thing	Bad thing	Haven't heard enough (VOL)	Neither good nor bad (VOL)	DK/Refused	Total
United States	53	20	14	2	12	100
Germany	55	25	8	1	11	100

	Q4a Now thinking about standards for products and services...In general, do you trust European standards or American standards more when it comes to a. food safety?					
	European standards	American standards	Neither (VOL)	Both (VOL)	DK/Refused	Total
United States	22	67	1	3	7	100
Germany	94	2	2	0	2	100

	Q4b Now thinking about standards for products and services...In general, do you trust European standards or American standards more when it comes to b. data privacy?					
	European standards	American standards	Neither (VOL)	Both (VOL)	DK/Refused	Total
United States	29	49	8	3	12	100
Germany	85	3	9	0	3	100

	Q4c Now thinking about standards for products and services...In general, do you trust European standards or American standards more when it comes to c. environmental safety?					
	European standards	American standards	Neither (VOL)	Both (VOL)	DK/Refused	Total
United States	27	60	3	3	6	100
Germany	96	2	2	0	1	100

	Q4d Now thinking about standards for products and services...In general, do you trust European standards or American standards more when it comes to d. auto safety?					
	European standards	American standards	Neither (VOL)	Both (VOL)	DK/Refused	Total
United States	33	55	1	5	6	100
Germany	91	4	1	2	2	100

	Q5 In general, when American companies build factories in our country, does that mostly help or mostly hurt our economy?				
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total
Germany	49	43	1	7	100

	ASK FORM 1 ONLY: Q5f1 In general, when European companies build factories in our country, does that mostly help or mostly hurt our economy?					
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total	N=
United States	66	27	0	7	100	523

	ASK FORM 2 ONLY: Q5f2 In general, when German companies build factories in our country, does that mostly help or mostly hurt our economy?					
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total	N=
United States	67	26	0	6	100	479

	Q6 In general, when American companies buy German companies, does that mostly help or mostly hurt our economy?				
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total
Germany	19	73	1	7	100

	ASK FORM 1 ONLY: Q6f1 In general, when European companies buy American companies, does that mostly help or mostly hurt our economy?					
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total	N=
United States	31	56	2	12	100	523

	ASK FORM 2 ONLY: Q6f2 In general, when German companies buy American companies, does that mostly help or mostly hurt our economy?					
	Mostly help	Mostly hurt	No effect (VOL)	DK/Refused	Total	N=
United States	31	56	2	11	100	479

	Q7a Here are some things that may be part of a free trade agreement with [GERMANY: the U.S./U.S.: the European Union]. Please tell me if you support or oppose a. Making American and European standards for products and services as similar as possible?					
	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	DK/Refused	Total
United States	35	41	11	7	6	100
Germany	13	32	39	12	4	100

	Q7b Here are some things that may be part of a free trade agreement with [GERMANY: the U.S./U.S.: the European Union]. Please tell me if you support or oppose b. Removing all restrictions on investment between the U.S. and the European Union?					
	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	DK/Refused	Total
United States	12	27	29	20	13	100
Germany	7	34	41	12	6	100

	Q7c Here are some things that may be part of a free trade agreement with [GERMANY: the U.S./U.S.: the European Union]. Please tell me if you support or oppose c. Removing all duties that increase the price of goods imported from the [GERMANY: U.S./U.S.: European Union]					
	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	DK/Refused	Total
United States	15	26	29	20	10	100
Germany	12	26	47	10	5	100

	Q8 ASK IF SAYS FREE TRADE AGREEMENT IS A GOOD THING (Q3=1): Which of the following is the most important reason why you think a free trade agreement with [GERMANY: the U.S./U.S.: the European Union] would be a good thing for our country?					
	It will strengthen ties between the U.S. and the EU	It will help our economy [OR]	It will help our country be more competitive with China	DK/Refused	Total	N=
United States	22	32	43	3	100	507
Germany	30	34	32	4	100	542



	Q9 As you may know, the United States is negotiating a free trade agreement with eleven countries in Asia and Latin America called the Trans-Pacific Partnership. Do you think this trade agreement will be a good thing for our country or a bad thing?					
	Good thing	Bad thing	Haven't heard enough (VOL)	Neither good nor bad (VOL)	DK/Refused	Total
United States	55	25	10	1	8	100

	Q10 Which statement comes closer to your own views, even if neither is exactly right: The European Union should negotiate international trade agreements on behalf of Germany [OR] The German government should negotiate trade agreements for Germany rather than the EU?			
	The European Union should negotiate international trade agreements on behalf of Germany	The German government should negotiate trade agreements for Germany rather than the EU	DK/Refused	Total
Germany	28	65	7	100