



GED Study

Attitudes to global trade and TTIP in Germany and the United States

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1. Executive Summary

Generally positive opinion of trade sharply decreasing.

Approval of increased trade is decreasing sharply in Germany. In the United States, by contrast, it has increased slightly. This means that at present in Germany only 56 % consider trade with other countries to be a good thing, while 27 % have a negative opinion. Two years ago, 88% had a positive opinion and only 9 % were against increased trade. In the United States, approval increased slightly from 71 % to 82 %, while rejection fell from 23 % to 13 %. In Germany, even in the business-friendly parties, there are significant minorities who are critical of trade. In general, there is stronger approval of trade with industrialized countries than trade with emerging economies, which applies to both, Germany and the United States.

General rejection of TTIP – strong interest in the issue.

A majority in Germany disapproves of the planned TTIP agreement. 33 % have a negative opinion of TTIP, with only 17 % considering it a good thing. In the United States, opinion is split, with 15 % in favor and 18% against. In both countries, however, a high proportion of the survey participants did not feel that they were sufficiently well-informed, the percentages being 46% in the United States and 30 % in Germany. In this respect, opinions have become considerably more negative. Two years ago, 55 % of Germans and 53 % of Americans were in favor of TTIP, with disapproval levels being 25 % (Germany) and 20 % (United States) respectively. Furthermore, at that time respondents did not feel as uncertain, with only 8 % of Germans and 14 % of Americans considering themselves not sufficiently well-informed. At the same time, there is great interest in TTIP, both among Germans (52 %) and Americans (44 %).

Germans fear that standards will be watered down. When respondents were asked about the impact of TTIP, in Germany a majority were concerned that standards could be watered down. This applies particularly to consumer protection and environmental, labor and social standards. In terms of impact on the economy (growth, competitiveness

and the labor market), there is no clear overall opinion. Generally speaking, this applies to the United States as well, where positive and negative opinions on standards and the economy are roughly equally strong.

Impact of globalization accurately assessed. German respondents evaluated various statements about the impact of globalization on the German economy correctly. They considered Germany to be one of the winners of globalization and also felt that Germany has benefited from the European single market. They understand that German companies generate a large part of their turnover abroad and that many jobs in Germany are dependent on exports. Additionally, they believe that companies that export pay higher wages. In this respect, they are in agreement with studies investigating the impact of globalization.

Disapproval of TTIP outweighs approval in Germany.

When comparisons are made between several surveys in Germany on the approval of TTIP, it becomes clear that the disapproval rates of TTIP are now outweighing approval rates. The trend towards disapproval continues and is becoming stronger.

Industry also increasingly skeptical. Surveys among industry associations demonstrate skepticism about TTIP. An exception is a survey among companies active in foreign trade, a majority of which view TTIP positively.

European majority welcomes TTIP, but Germany and Austria particularly skeptical. In a European context, the majority approves of TTIP, with the majority voicing opposition only in Germany, Luxembourg and Austria. However, even here a slightly negative trend can be observed, as approval of TTIP is decreasing.

2. Introduction

Since 2013, the United States and the European Union have been negotiating a free trade agreement known as TTIP (Transatlantic Trade and Investment Partnership). The objective is ambitious: it is intended to create a single transatlantic economic area. In order to achieve this goal, not only would tariffs need to be removed, but closer regulatory cooperation is required as well. This would mean not only that imports would be given duty-free treatment, but that numerous non-tariff trade barriers would be removed. The expectations of TTIP are high. A significantly positive impact is expected due to easier access to larger markets and a broader range of products being available at lower prices. A study commissioned by the EU Commission (CEPR 2013) estimates an additional economic output of €119 billion for the European Union and €95 billion for the United States due to TTIP.

However, since the opening of negotiations, there has been intense controversy between supporters and opponents of such a free trade agreement. Criticism of TTIP is diverse. It has included criticism of the secret negotiations, fears that product, data protection and social standards will be watered down and that the legal system will be undermined by arbitration tribunals for investment protection. Some of these criticisms are not restricted to Europe, but are mirrored by debates in the United States. During the negotiations, the European Commission has responded to some of these criticisms, run public consultations and proposed alternatives in discussions, for example, an international investment court instead of arbitration tribunals.

But what do citizens in Germany and the United States really think about TTIP and free trade? What hopes, fears and concerns do they have? And how have these hopes and fears changed during the course of the negotiations? How has the intense debate on the issue influenced citizens? In order to answer these and other questions, the Bertelsmann Stiftung commissioned YouGov to carry out a representative survey in the United States and Germany, the results of

which are presented in this study. Additionally, it is possible to draw comparisons with a similar survey, carried out two years ago by Bertelsmann Stiftung with the help of the Pew Research Center (Pew 2014). Such a comparison renders relevant opinion shifts visible and highlights trends in public discourse.

The survey basically consists of two sets of questions: attitude to trade in general and attitudes to TTIP and related topics. Generally, one can observe that in Germany not only TTIP is met with disapproval, but also that almost 30% have a critical view of free trade in general. This is a clear increase in comparison with the results of the previous survey. However, it continues to be the case that the majority is generally open to free trade. This also applies in principle to increased trade between Germany and the United States. The specific TTIP plans, however, are met with disapproval in Germany. In the United States, opinion is less clearly defined, with equal numbers of supporters and skeptics. However, in both countries, a large share of respondents did not have a clear opinion on TTIP or refused to answer. The results of the survey suggest that increasing disapproval of TTIP in Germany is mostly connected with fears that product and social standards might be watered down. Such fears are less pronounced in the United States.

3. Survey design

On behalf of the Bertelsmann Stiftung, YouGov carried out a statistically representative online survey in Germany and the United States. For the U.S. part of the study, a total of 1,126 citizens were surveyed on February 23, 2016. The survey in Germany took place from February 17 to February 19, 2016, with a total of 2,019 respondents. The questions in both surveys were mostly identical, with the exception of a few country-specific questions (e.g. TPP in the United States). These closed-ended questions can be broken down into four sets of topics:

- Questions on attitudes to free trade in general
- Questions on attitude to trade with particular countries
- Questions on attitudes to and interest in TTIP
- Questions on the expected impact of TTIP on economic, regulatory and political trends

The survey differentiated between respondents according to socio-economic criteria, which made a detailed analysis of the results possible.

The earlier study, Pew 2014, to which this study refers several times, was carried out with a different methodology, which may lead to differences in the results. In contrast to the YouGov survey, it was carried out over the telephone as opposed to an online questionnaire. In the United States, the questions were asked in English and in Spanish. In both the German and U.S. parts of the Pew Study approximately 1000 respondents were involved.

In both studies, the YouGov survey and the Pew study, results were weighted in accordance with known demographic discrepancies. The confidence interval for the German YouGov Survey was +/- 2.2 percentage points, and for the U.S. YouGov Survey it was +/- 3.1 percentage points. These figures apply to the overall survey, but not to subsamples (such as age, party allegiance, etc.).

4. Results

Clear decrease in the fundamentally positive opinion of trade

As Figure 1 shows, the general attitude to increased trade is positive in Germany and in the United States. However, support for trade with other countries is much more pronounced in the United States than in Germany. In Germany, 56 % consider trade with other countries as good or very good, but even so, 27 % consider it bad or somewhat bad. That is a clear decrease in approval rates in contrast to the results of Pew 2014 (Figure 7), according to which only 9 % considered increased trade to be bad or very bad. In the United States, 82 % consider increased trade to be good or very good and only 13 % disapprove. Thus resistance to increased trade has fallen in the U.S.

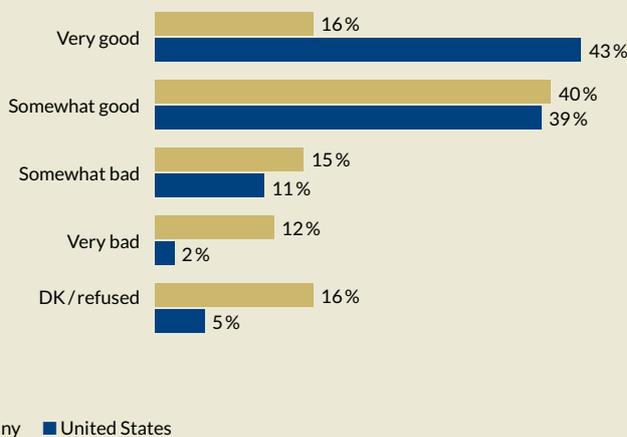
In the following figures (Figures 2–6), the answers to these questions have been broken down according to socio-economic criteria. For both Germany and the United States, it can be observed that approval of increased trade rises with

level of education (Figures 2 and 3). In these sub-groups, the confidence intervals applicable are different from the +/-2.2 percentage points for the whole survey in Germany.

It is also interesting to break the answers down by respondents' political allegiances. In Germany, respondents were broken down based on the party they had voted for in the last Bundestag national elections. Across all parties, a majority approved of more trade. Approval was strongest among FDP and CDU/CSU voters. By contrast, disapproval is strongest in the AfD, closely followed by the Linke (Left Party) voters. In the case of these parties, those in favor have only a slight lead. Among the voters of the SPD and the Greens, while a clear majority approves, there is a significant number of respondents who are against increased trade. However, what is surprising is that even in the centre or centre-right parties, a large share of respondents are against free trade (25 % in the FDP and 24 % in the CDU/CSU). In the United States, approval of increased trade is stronger than in Germany for almost all political allegian-

Figure 1: What do you think about the increasing trade between Germany / USA and other countries?

Do you think that for Germany / the United States it is a very good thing, somewhat good, somewhat bad or very bad? (percent)



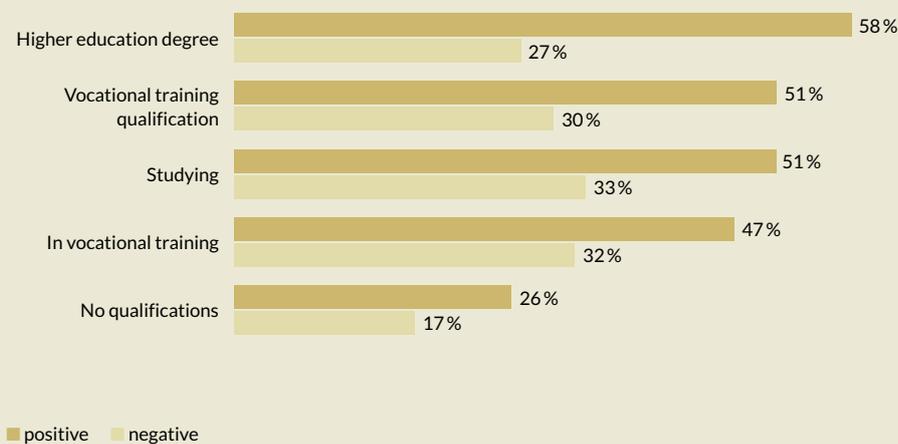
ces. For all such groups, approval is around 70%, while disapproval generally remains under 20%. Only for the “very conservative” group approval is clearly lower and disapproval shown clearly, but even in this group, a majority approve of more trade.

When comparing various age groups, in Germany approval of increased trade rises slightly with age. In the United States, this trend is stronger, with the 35-44-year-old age group particularly open to trade.

There continues to be a majority in favor of increased trade, but this has clearly decreased in comparison with the study carried out two years ago (Figure 7). In Pew 2014 88% of Germans had a positive opinion of trade with other countries, but only 56% did so in this study. This is a surprisingly sharp decrease. Disapproval rates in Germany have increased from 9% to 27%, and the share of those who refused to answer has also increased. The picture is different for the United States, where approval of increased trade is continuing to rise. While in 2014 71% welcomed increased trade

Figure 2: What do you think about the increasing trade between Germany and other countries?

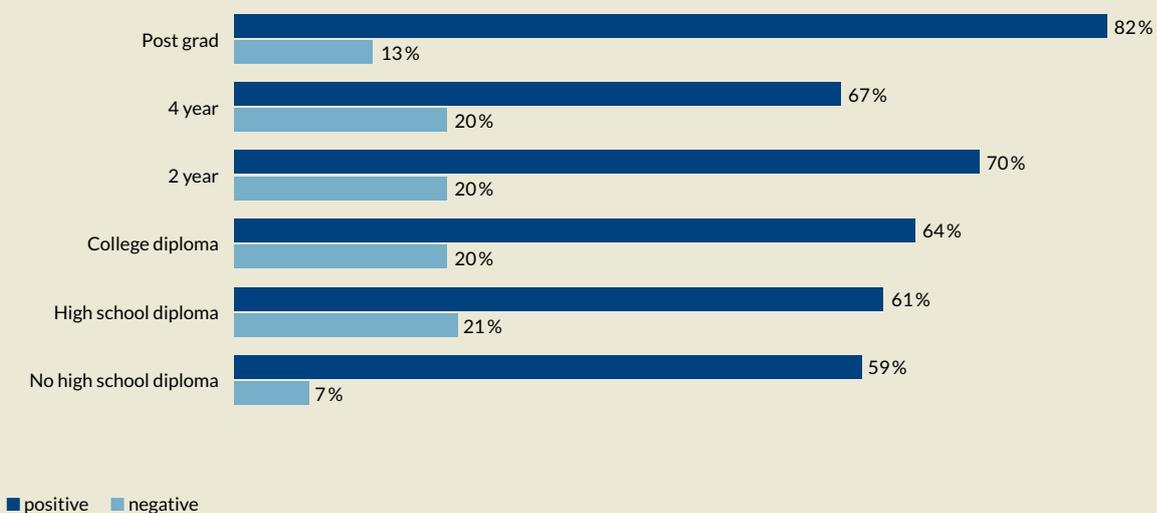
Do you think that for Germany it is a very good thing, somewhat good, somewhat bad or very bad? (per cent, by education, Germany)



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Figure 3: What do you think about the increasing trade between the United States and other countries?

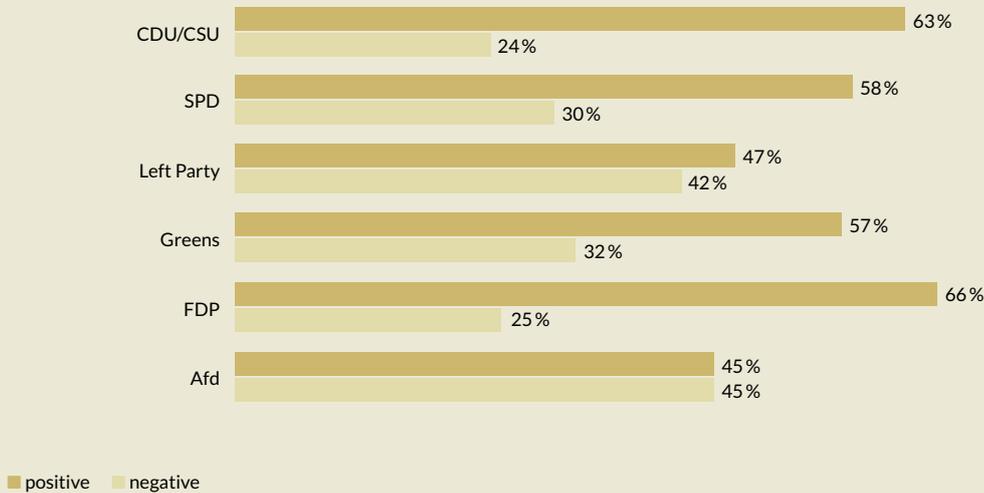
Do you think that the United States it is a very good thing, somewhat good, somewhat bad or very bad? (per cent, by education, US)



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Figure 4: What do you think about the increasing trade between Germany and other countries?

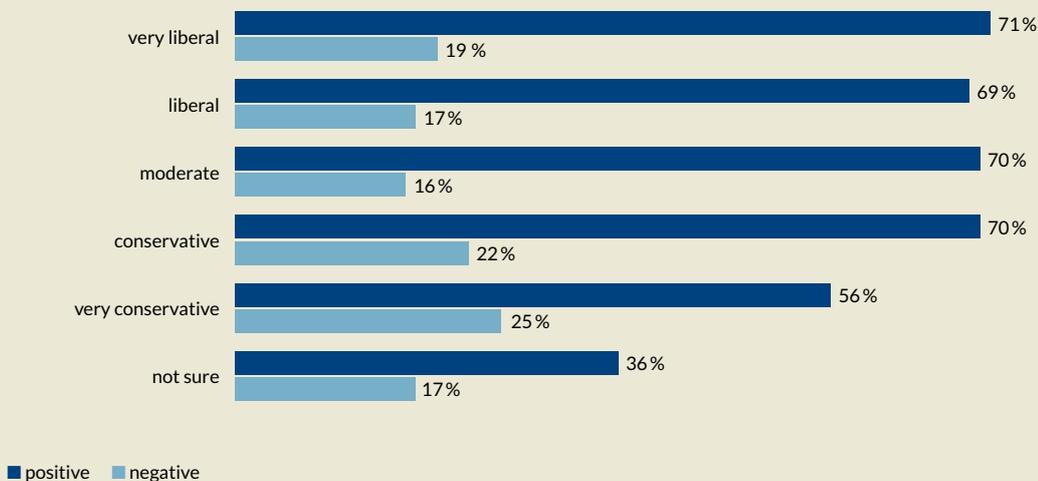
Do you think that for Germany it is a very good thing, somewhat good, somewhat bad or very bad? (per cent, by party allegiance)



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Figure 5: What do you think about the increasing trade between the United States and other countries?

Do you think that for the United States it is a very good thing, somewhat good, somewhat bad or very bad? (per cent, by political tendency, United States)



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with the world, now it is 82 %. Disapproval has decreased from 23 % to 13 %.

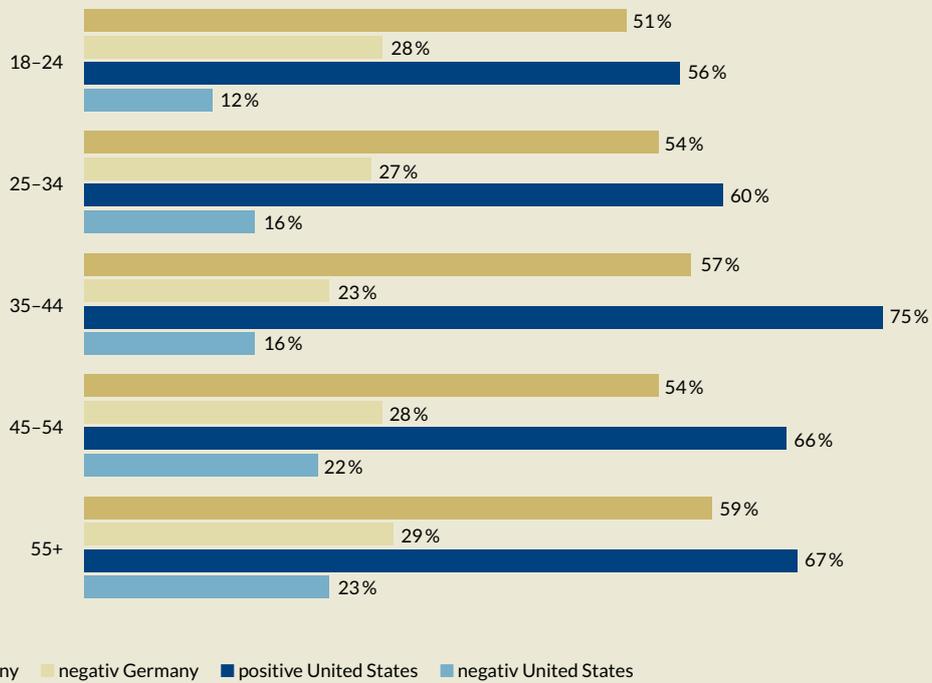
Industrial countries as preferred trade partners

Even if a majority approve of increased trade, it does not follow that this applies for trade with any trade partner. This is why a final set of questions focused specifically on how respondents viewed increased trade with particu-

lar trade partners. Here too, the general attitude is positive. However, trade with industrial countries was fundamentally viewed more positively than trade with emerging countries. With respect to the discussions on TTIP, it is interesting that increased trade between the United States and Germany is basically welcome. This is true for respondents in both countries, as can be seen from Figure 8. Trade with other industrialized countries, such as the UK, France or Japan, is also viewed positively by the majority in both countries, as Table 1 shows.

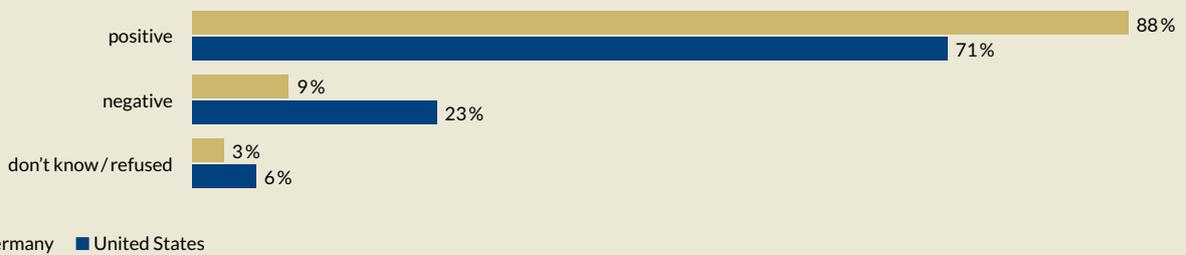
Figure 6: What do you think about the increasing trade between Germany / the United States and other countries?

Do you think that for Germany / the United States it is a very good thing, somewhat good, somewhat bad or very bad? (per cent, by age group)



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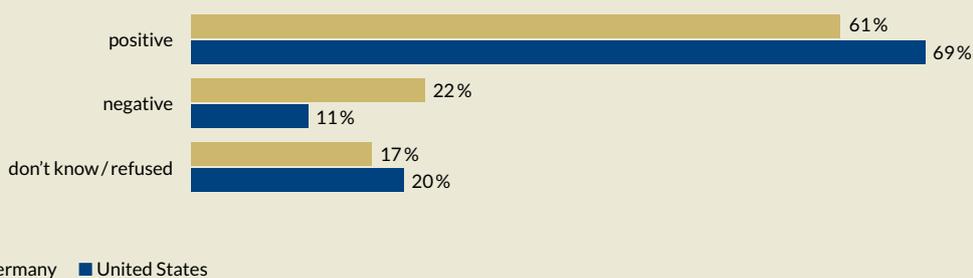
Figure 7: Trade between Germany / the United States and other countries is ...



Source: Pew 2014

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Figure 8: If you think about trade between Germany/the United States and other countries, would increased trade with the United States/Germany be ...

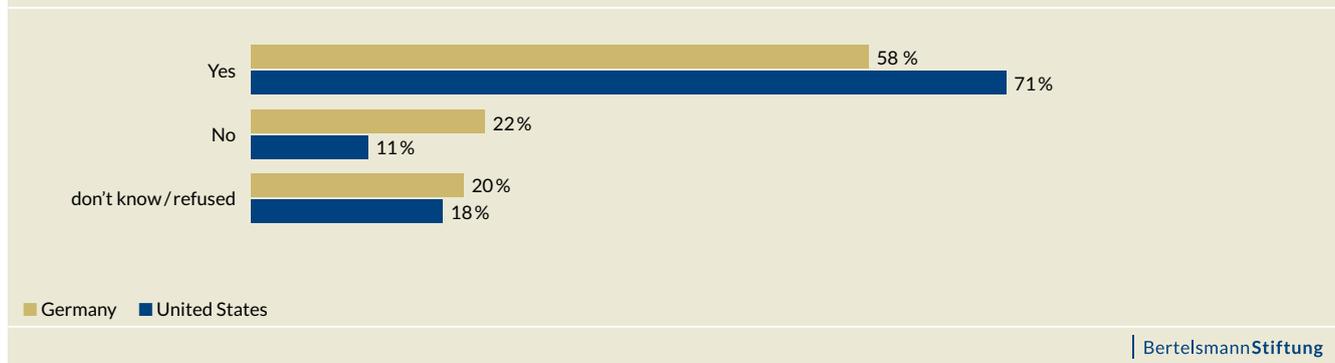


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Tabelle 1: If you think about trade between Germany/the United States and other countries, would increased trade with the United States/Germany be ...

	Germany			United States		
	Positive	Negative	don't know/refused	Positive	Negative	don't know/refused
Germany				69%	11%	20%
United States	61%	22%	17%			
Japan	67%	15%	19%	63%	17%	20%
France	77%	6%	17%	72%	9%	19%
UK	72%	10%	18%	72%	8%	20%
China	53%	28%	18%	40%	41%	19%
Russia	49%	31%	20%	39%	37%	23%
India	55%	24%	21%	56%	23%	21%

Figure 9: Should Germany/ the United States protect its economy more from foreign competition?



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When trade with emerging countries is considered, the picture is different (Table 1). In this case, too, the majority has a positive opinion, but not to the same extent as for trade with other industrialized countries. The Americans are more skeptical than the Germans regarding trade with China and Russia. However, respondents in both countries consider trade with India as being more positive than negative. In comparison with Pew 2014, approval levels in the United States and Germany have gone down slightly, but not altered substantially.

Despite the generally more positive than negative attitude to increased trade, concerns have arisen among respondents about the impact of the increased competition this will bring. As can be seen from Figure 9, a majority in both Germany and the United States are in favor of greater protection of their own country’s economy from foreign competition.

General rejection of TTIP – strong interest in the issue

A second section of the survey focused on TTIP. First there were questions about respondents’ interest in TTIP negotiations as well as on their underlying attitude to agreements such as TTIP. Then they were asked about what kind of effects they expect TTIP to have.

Overall, there was clearly a negative attitude to TTIP in Germany (Figure 10), while in the United States there were only slightly more negative opinions than positive ones. However, in both countries, a very high proportion of respondents did not feel sufficiently well-informed or refused to answer.

If this question is broken down according to party allegiances, it becomes clear that the majority are skeptical about TTIP, whatever their party allegiance may be (Figure 11). Disapproval is strongest among supporters of the Greens and the CDU/CSU. In the United States, disapproval of TTIP is strongest on the political wings, with rates of approval a mirror image of this pattern (Figure 12). However,

Figure 10: Do you think TTIP is a good thing or a bad thing for Germany/the United States?

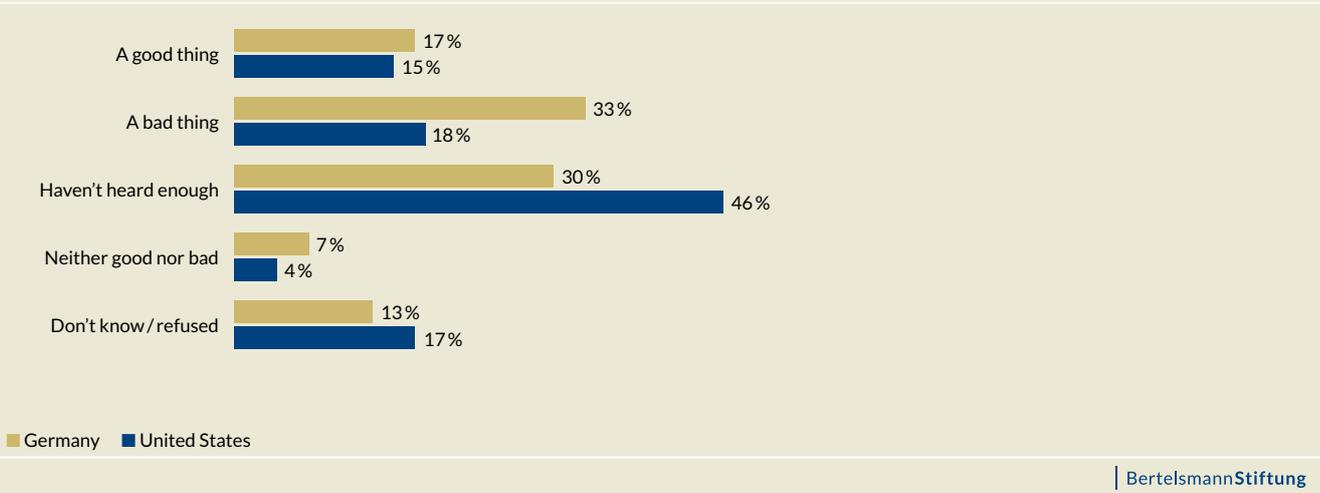
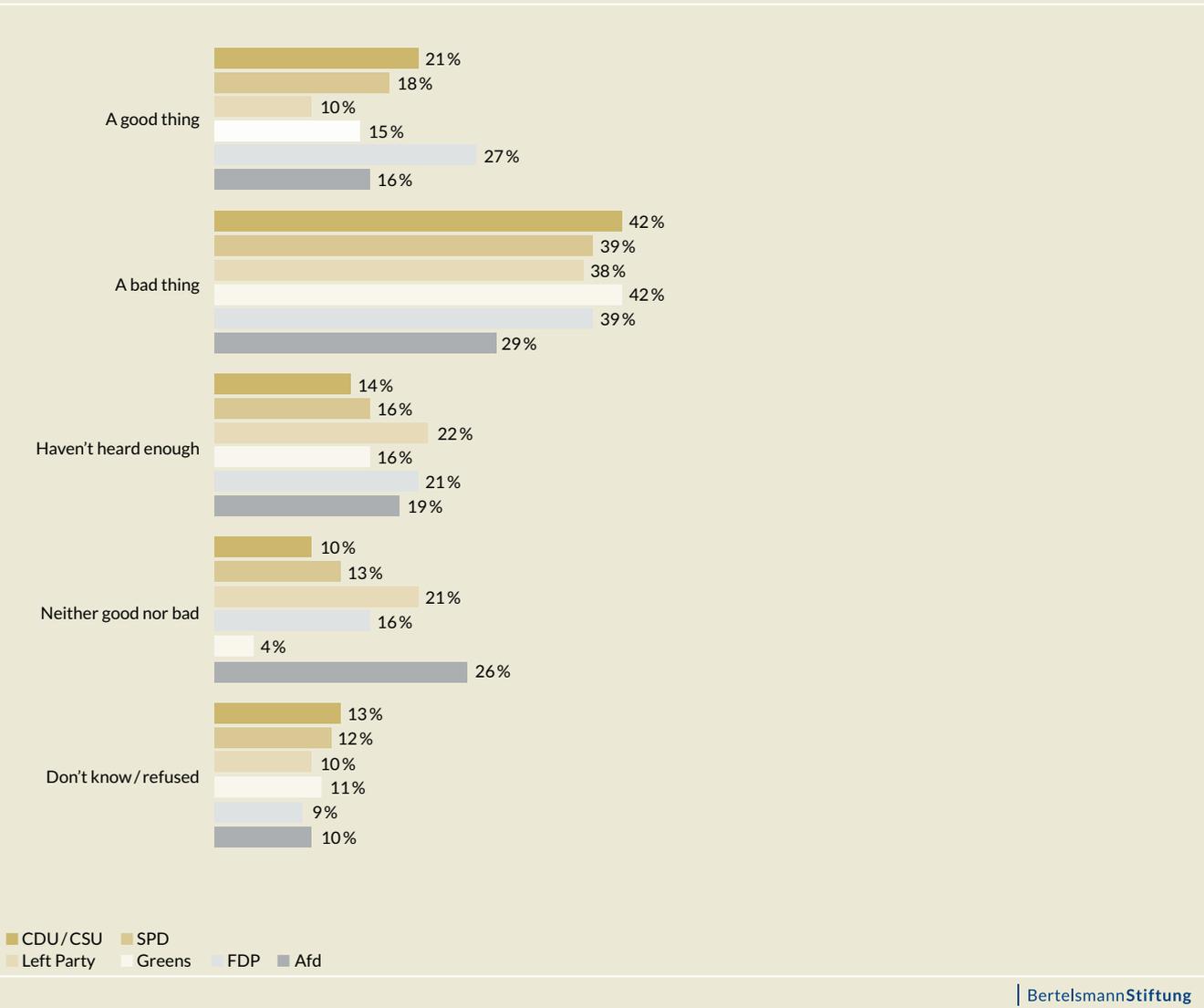


Figure 11: Do you think TTIP is a good or bad thing for Germany?



the majority of respondents did not feel sufficiently well-informed.

Across the board, it is interesting to compare opinions on the issue of TTIP with PEW (2014). Two years ago, opinion on TTIP was much more positive and there was less uncertainty than is shown in Figure 13. This is true for the United States as well as for Germany.

One factor which may explain this high level of uncertainty among respondents is the interest in TTIP among the general population (Figure 14). Although in Germany more than 50% are interested in the issue, around as many

were not interested or refused to answer. In the United States, the share of those who are interested in TTIP is somewhat smaller than in Germany. However, only a small proportion of the population, 10–15% is actively participating in the debate over TTIP, for example, by taking part in events or discussing it over the internet (Figure 15).

Germans fear that standards will be watered down

In order to better understand opinion on TTIP, respondents were asked about what effects they expected a trade agreement of this kind to have. The responses are presented in

Figure 12: Do you think TTIP is a good thing or a bad thing for the United States?

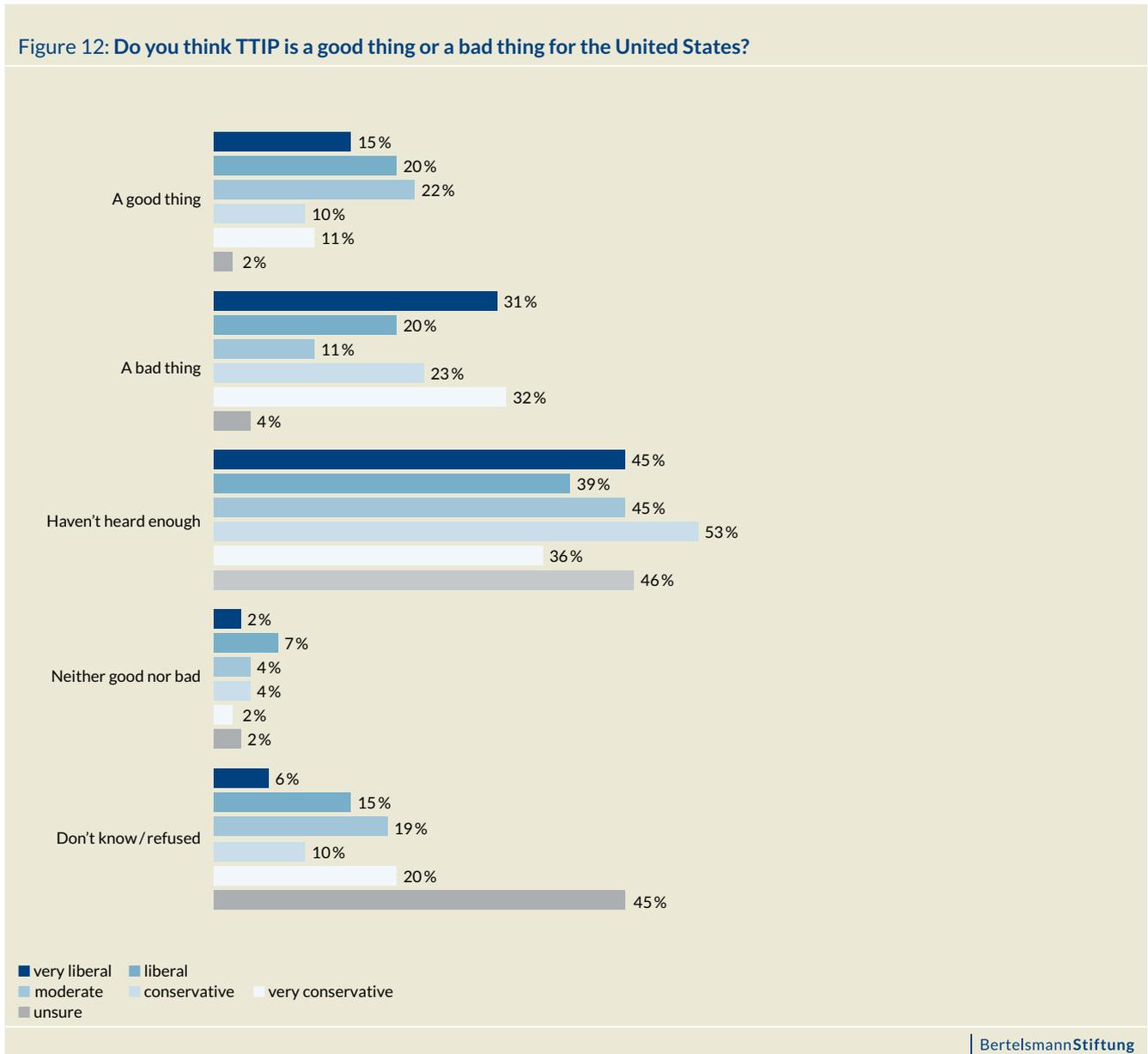
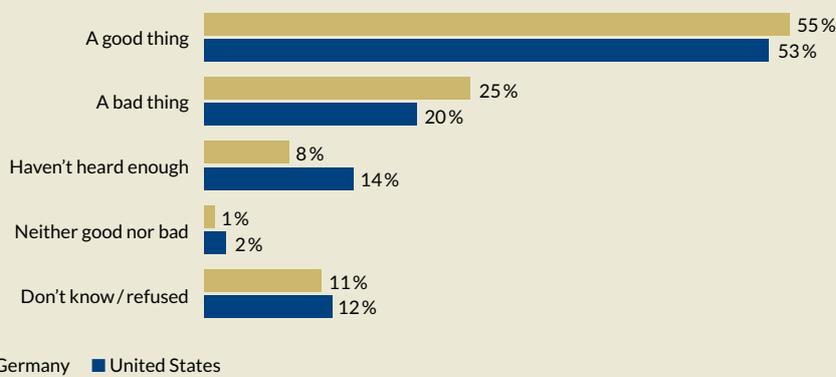


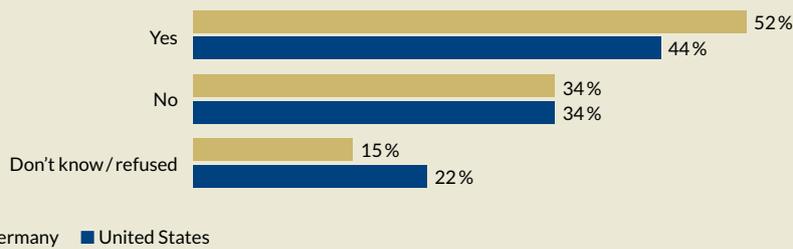
Figure 13: Do you think that TTIP would be a good thing for your country?



Source: Pew 2014

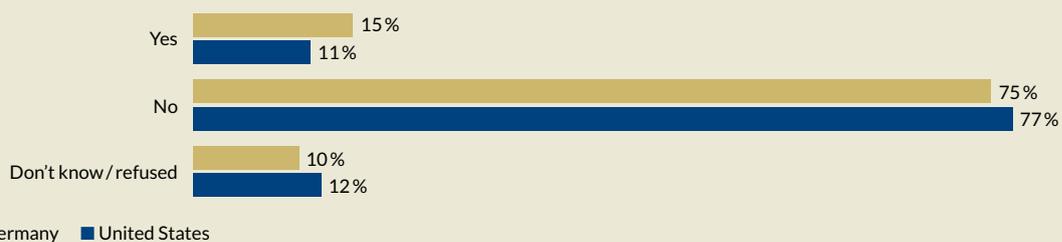
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Figure 14: Are you interested in TTIP?



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Figure 15: Are you taking part actively in the debate on TTIP?



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Tabelle 2: How do you think TTIP will affect the following in your country?

	Germany				United States			
	Positive	Negative	Neutral	Don't know	Positive	Negative	Neutral	Don't know
... economic growth	27%	26%	19%	28%	29%	23%	8%	39%
... employment and labor market conditions	23%	28%	22%	28%	21%	27%	11%	41%
... international competitiveness	29%	24%	19%	28%	24%	22%	11%	43%
... your country's global influence	23%	21%	26%	29%	31%	15%	16%	38%
... consumer protection (e.g. for agricultural products)	12%	48%	13%	27%	23%	22%	12%	43%
... environmental standards	12%	46%	16%	27%	18%	19%	20%	44%
... workers' rights/social standards	10%	40%	22%	29%	17%	24%	15%	45%
... cultural diversity	24%	17%	30%	28%	26%	12%	22%	39%
... public services	10%	27%	31%	31%	15%	13%	26%	46%
... democracy	10%	28%	32%	29%	20%	14%	23%	43%
... regulatory sovereignty	9%	37%	22%	32%	17%	22%	15%	47%

Table 2. For this question too, it was noteworthy that a large share of the respondents were unable to comment on their expectations. Generally speaking, it can be determined that respondents expect a trade agreement to result in a stimulus for economic activity, which points to a positive opinion about the effects on economic growth and competitiveness. It was expected that there would be a positive effect on the respondents' own countries influence in the world. However, at the same time, there were fears too, for example, with respect to the labor market situation.

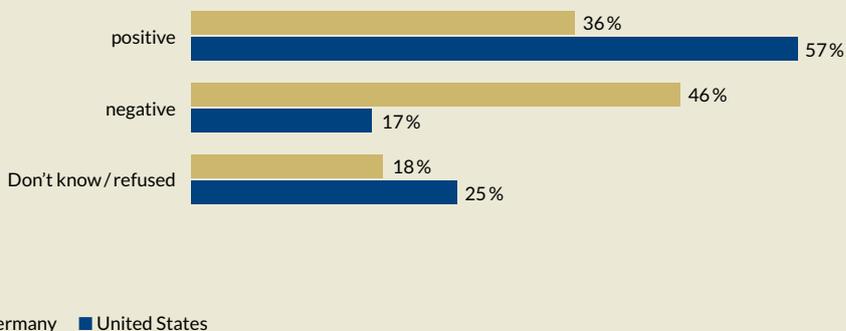
There were also questions on respondents' opinions on changes to various product and social standards. In this case, the result depended on which country the survey was being carried out in. Although in Germany negative expectations dominated as a whole, in the United States generally positive expectations slightly outweighed negative expectations. However, there was a greater amount of uncertainty in the United States.

One criticism of TTIP is the fear that product standards will be undermined. Past trade agreements have made use of two options to deal with different regulations: either for each party to mutually recognize the other's standards or to actively harmonize their standards with the trade partner. Since similar plans are involved in the TTIP negotiations,

respondents were asked about their opinion and confidence in EU and U.S. product standards. The results are shown in Figures 16 – 21.

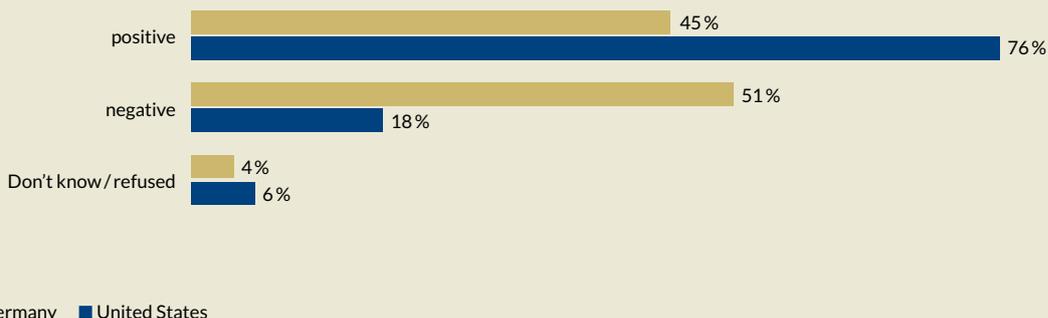
In the case of the general question of whether standards for products and services should be harmonized, there is a clear majority in favor in the United States, while in Germany, a majority is not in favor. This was also the case in Pew (2014). However, uncertainty had increased in both countries and this had a particularly negative impact on the number of supporters. The next question was whether respondents had more confidence in E.U. or U.S. standards. Generally, respondents from both countries had more confidence in the standards of their own country. Regarding this issue, Germans have more confidence in EU standards than U.S. citizens do in U.S. standards. The results in PEW 2014 were similar.

Figure 16: Are you for or against U.S. and E.U. standards for products and services being harmonized with each other as far as possible?



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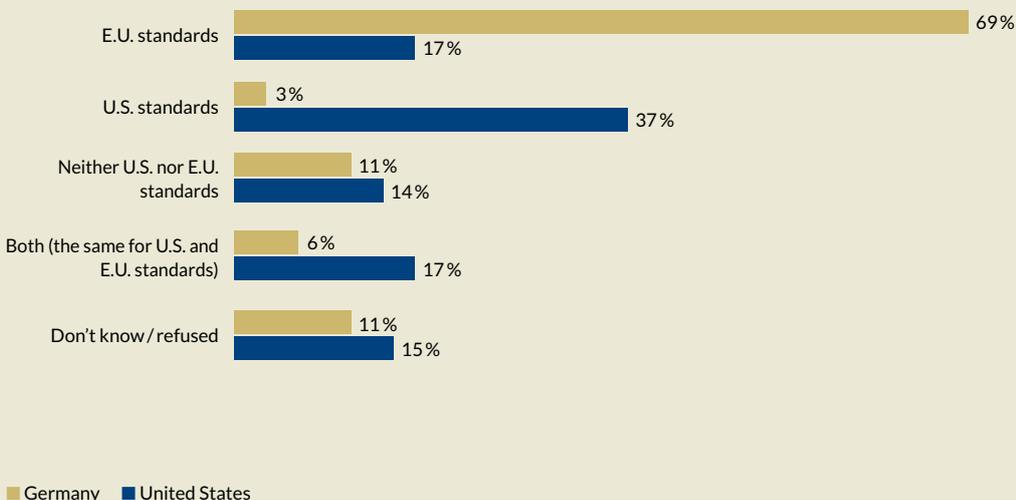
Figure 17: Should E.U. and U.S. standards be aligned with each other as far as possible?



Source: Pew 2014

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Figure 18: Do you trust E.U. or U.S. standards more when it comes to food safety standards?



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Figure 19: Do you trust E.U. or U.S. standards more when it comes to data privacy?

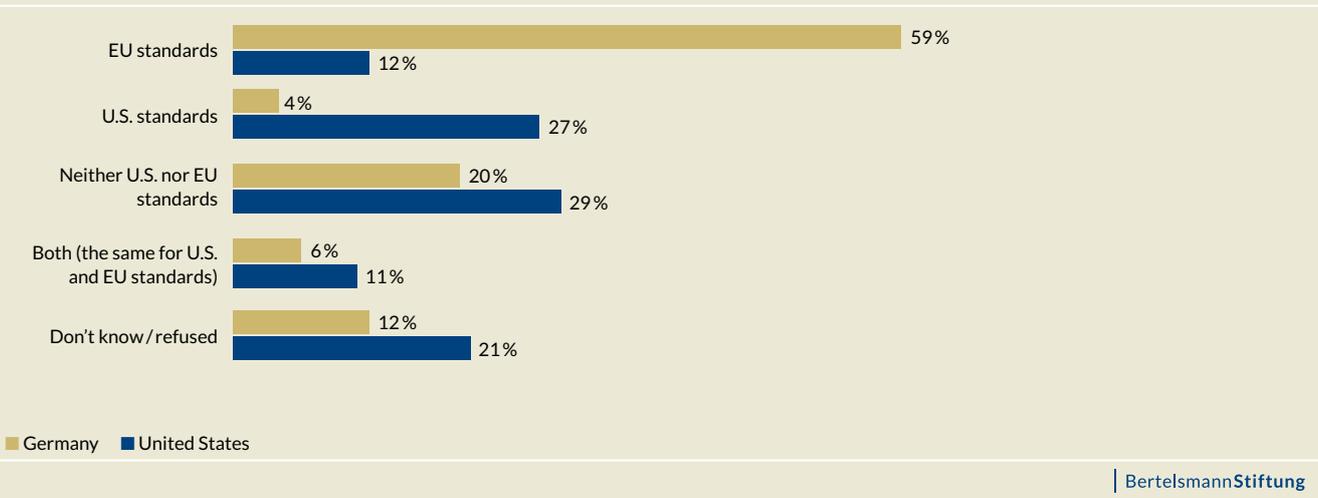


Figure 20: Do you trust E.U. or U.S. standards more when it comes to environmental safety?

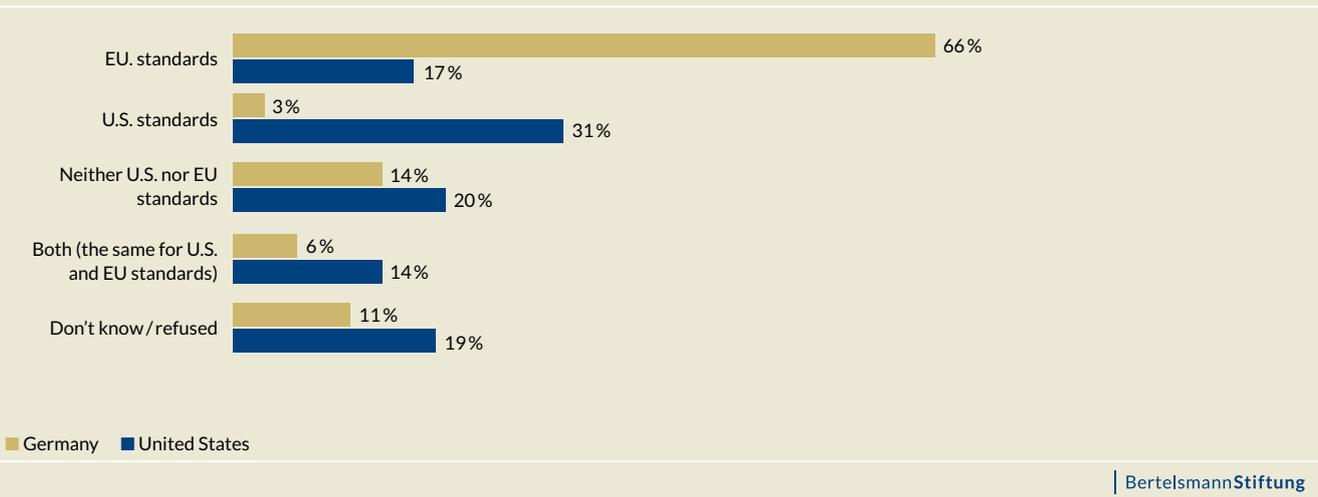


Figure 21: Do you trust E.U. or U.S. standards more when it comes to aviation safety?

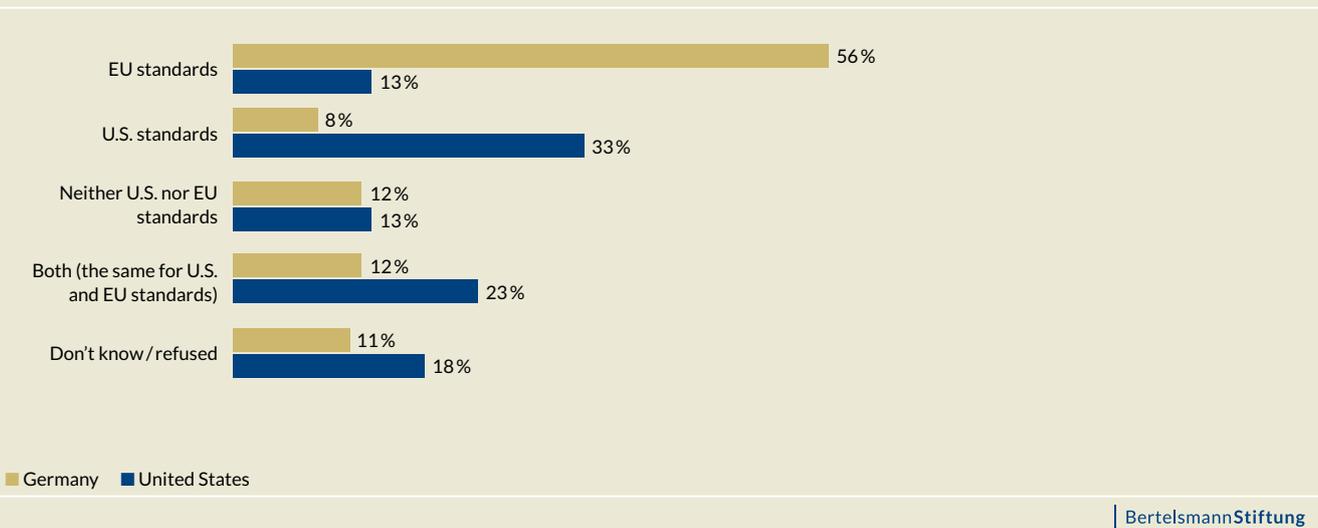
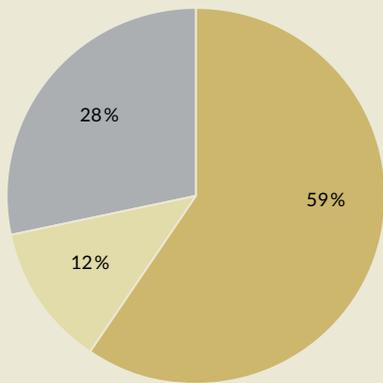


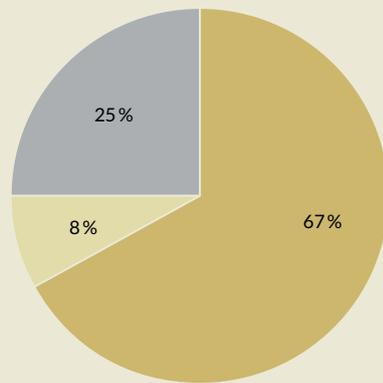
Figure 22: In the last 10 years, Germany has been one of the countries that has profited most from globalization.



True False Don't know/refused

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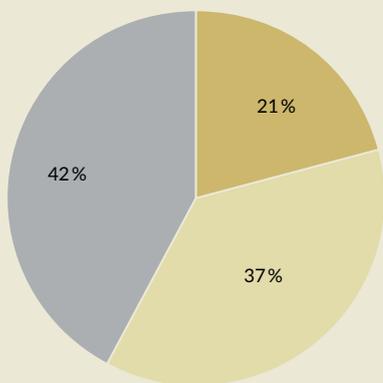
Figure 23: In Germany, one in four jobs is dependent either directly or indirectly on exports.



True False Don't know/refused

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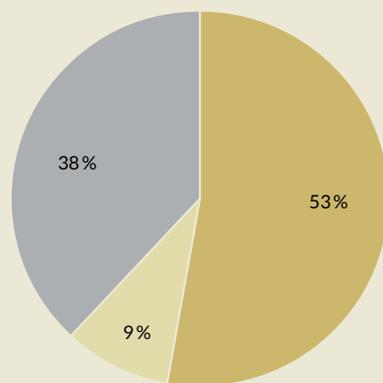
Figure 24: German exporting firms pay their employees less than non-exporting firms.



True False Don't know/refused

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Figure 25: At present, the 100 largest listed firms in Germany earn two thirds of their sales abroad.



True False Don't know/refused

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Figure 26: The European single market created in 1992 has slowed down growth in Germany.

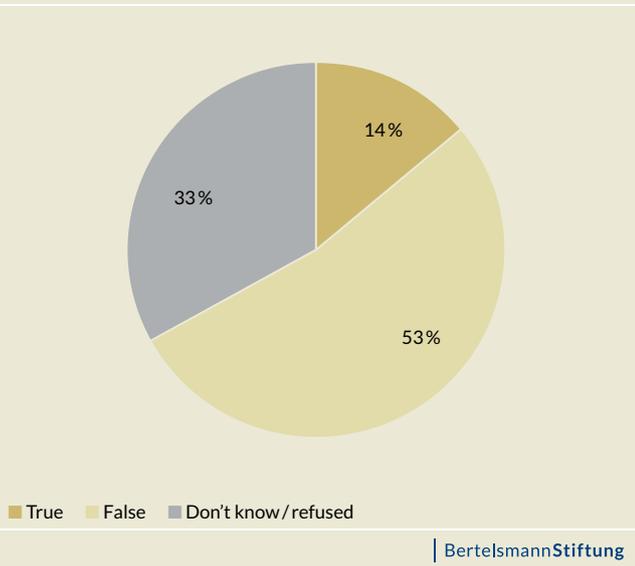


Figure 27: Who would benefit more from TTIP?

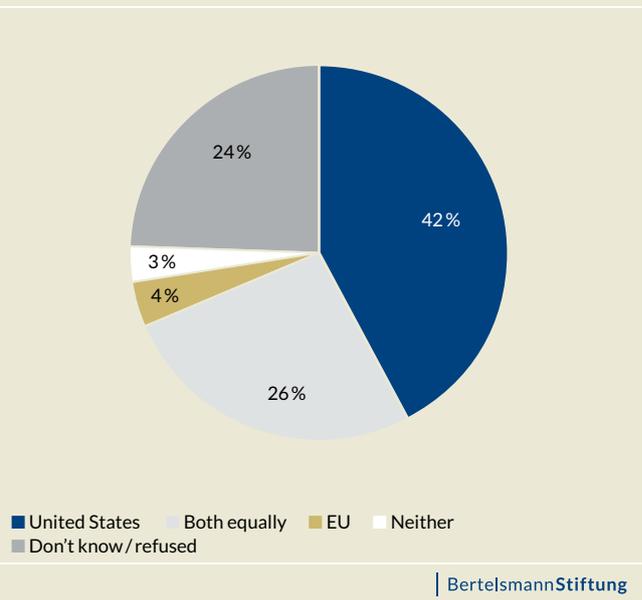


Figure 28: Who in Europe would benefit more from TTIP?

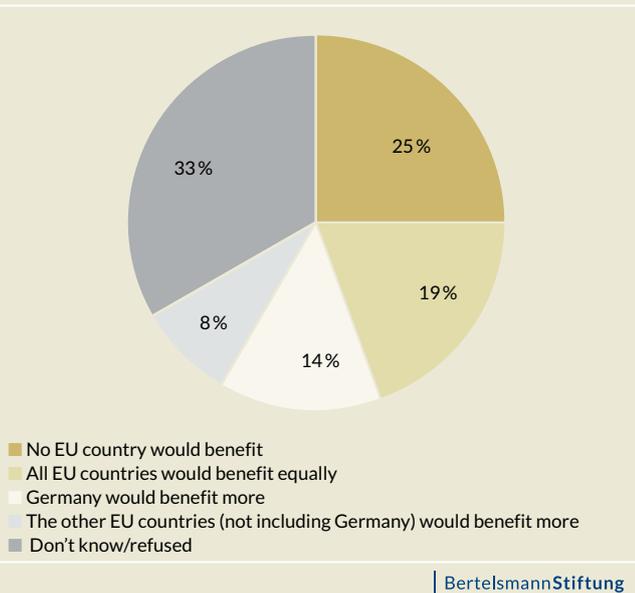


Figure 29: What impact do you expect TTIP would have on Europe's competitiveness?

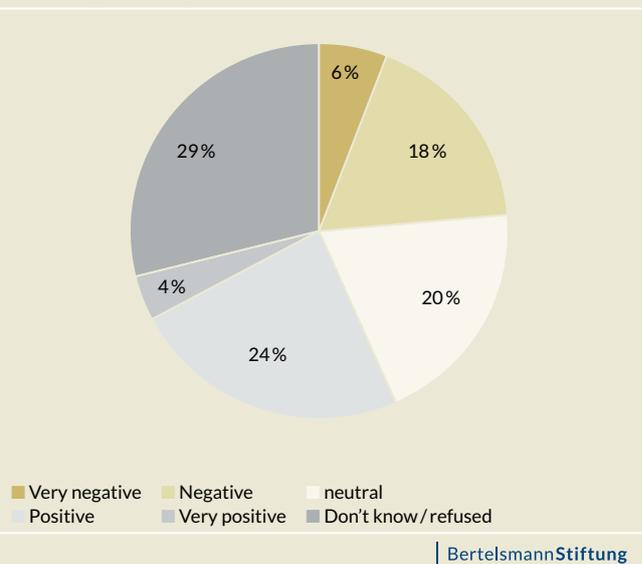


Figure 30: Do you think that the transparency of the TTIP negotiations has been improved since it was first criticized?

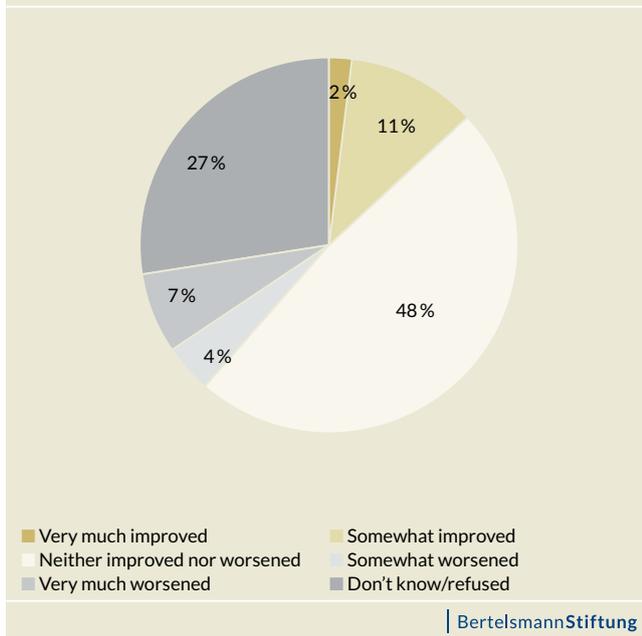
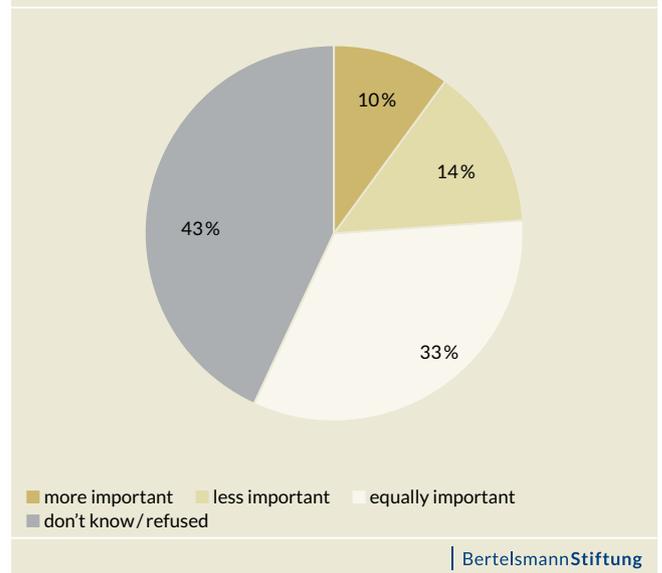


Figure 31: As you may know, the United States has recently signed a free trade agreement with eleven Asian and Latin-American countries, know as TTP. Do you think this agreement is more important or less important than TTIP?



FCountry-specific questions

Accurate evaluation of the impact of globalization

Most country-specific questions were posed to participants in Germany. These questions also consisted of one section on trade in general and a section relating to TTIP. In the general section, respondents were asked their opinion of various hypotheses on globalization and trade. In this case, the majority assessed the hypotheses accurately. As shown by Figure 22 – 26, Germans evaluate the impact of globalization and trade on their economy as generally positive. This means that a majority of respondents consider Germany as one of the winners of globalization (Source for this statement: Bertelsmann Stiftung, Globalization Report 2014, p. 35) and do not believe that the advent of the European single market has had a negative impact on the German economy (Source: Bertelsmann Stiftung, 20 Years of the European Single Market, 2014, p. 6). Respondents believe that jobs in Germany depend heavily on export (source: BMWi 2016) and also that German companies make a large part of their profits abroad (Handelsblatt February 1, 2016). They do not believe that exporting companies pay lower wages than those which are only active on the German market (Bertelsmann Stiftung, Rising Wage Inequality in Germany, 2014, p. 29).

Regarding questions which relate directly to TTIP (Figures 27–30), respondents expect the United States to benefit more from the agreement than Europe. A small majority of respondents expect TTIP to have positive effects on European competitiveness, but many also expect negative consequences or that there will not be any significant effect. One of the major criticisms of TTIP is the lack of transparency in the negotiations. The overwhelming majority of respondents think that criticism of the level of transparency has not lead to any noticeable improvements in that respect.

As part of the United States survey, an additional question was asked (Figure 31). The United States had recently signed the Trans-Pacific Partnership with eleven Asian and Latin-American countries. For many observers, this has been interpreted as a significant pivot by the United States to Asian markets. Therefore, respondents from the United States were also asked whether they considered TPP more or less important than TTIP. It is interesting to note that a majority of Americans consider TTIP and TPP equally important.

5. Comparison with other surveys

Since TTIP is an issue which provokes a great deal of public interest, numerous surveys have already been carried out on this topic. Therefore, there is the opportunity to make comparisons between this and other surveys which have been carried out previously. Thus changes in public opinion can be traced more comprehensively.

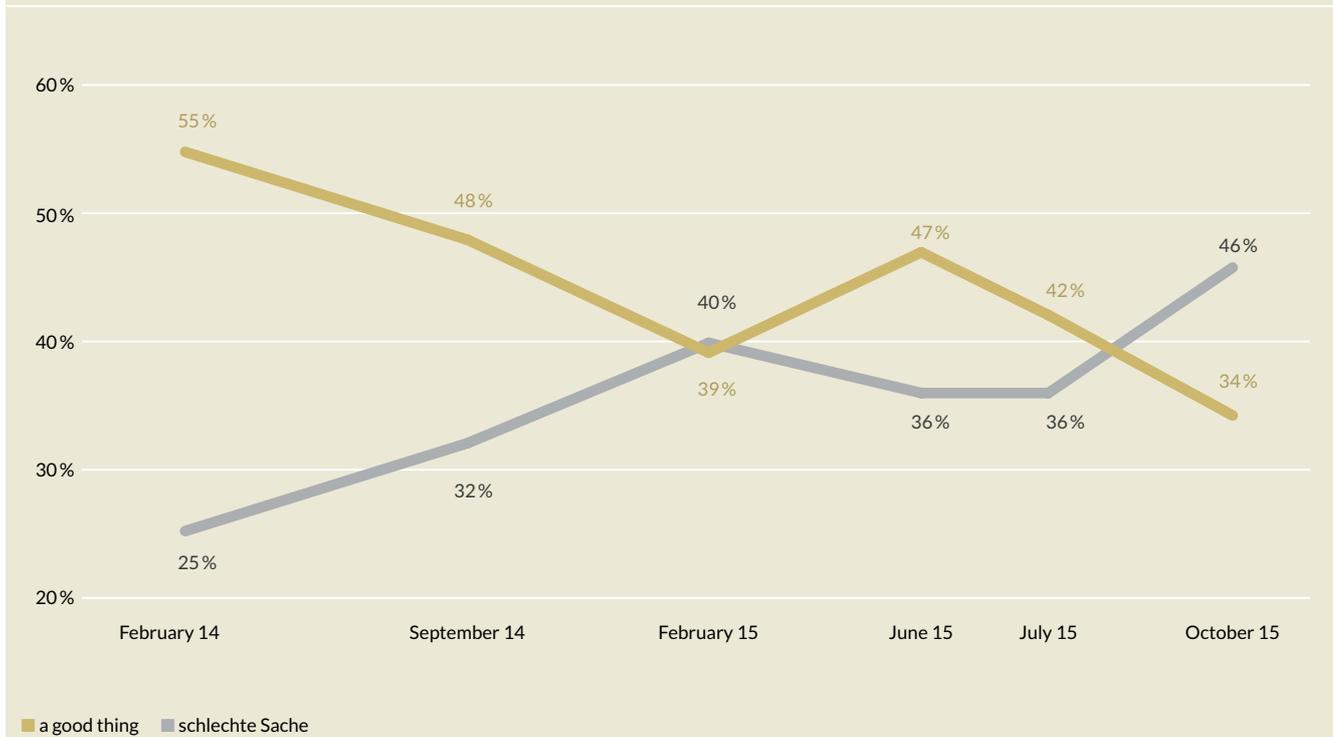
In the case of Germany, doing so clearly shows a negative trend. Approval of TTIP has never been so low. If you compare public opinion in Germany with survey results for the rest of Europe, it is only in Austria that public disapproval of TTIP is higher.

Disapproval of TTIP outweighs approval in Germany

In Germany, several surveys on the issue of TTIP have been carried out. In particular, TNS Emnid has carried out several surveys on the matter since February 2014. This series of surveys clearly depicts a negative trend in approval of TTIP (Figure 32). If the most recent data from TNS Emnid (from October 2015) is compared with the results of this survey, it shows that approval has continued to fall since then.

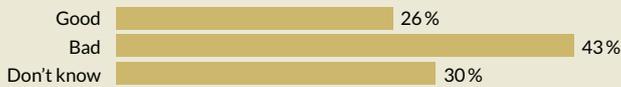
It is also interesting to make comparisons with an earlier YouGov survey from March 2015 (Figure 33). Thus, as in the

Figure 32: Is TTIP a good thing or a bad thing for Germany?



Source: Emnid

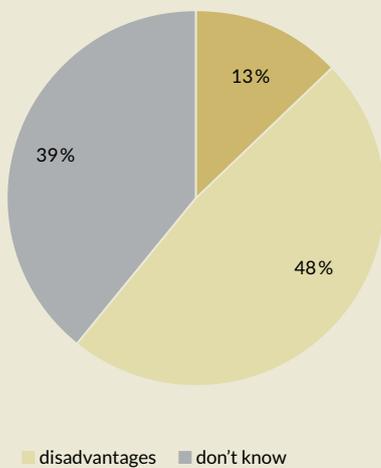
Figure 33: Do you think that TTIP would be good or bad for Germany?



Source: YouGov 2015

BertelsmannStiftung

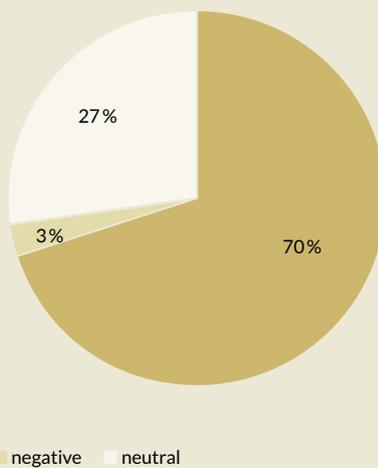
Figure 34: Would TTIP bring Germany more advantages or disadvantages?



Source: Forschungsgruppe Wahlen February 2016

BertelsmannStiftung

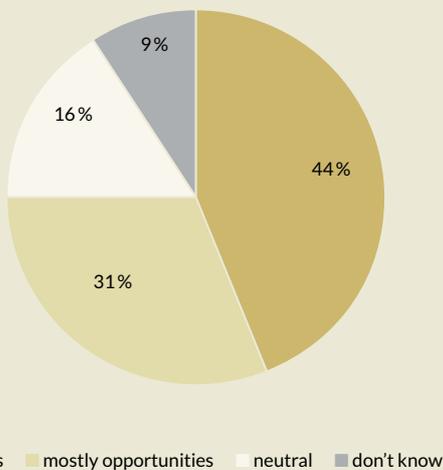
Figure 35: What do you think of TTIP?



Source: DIHK 2014

BertelsmannStiftung

Figure 36: At present, what do you think of the outlook for German industry if there is a free trade agreement?



Source: FKI 2014

BertelsmannStiftung

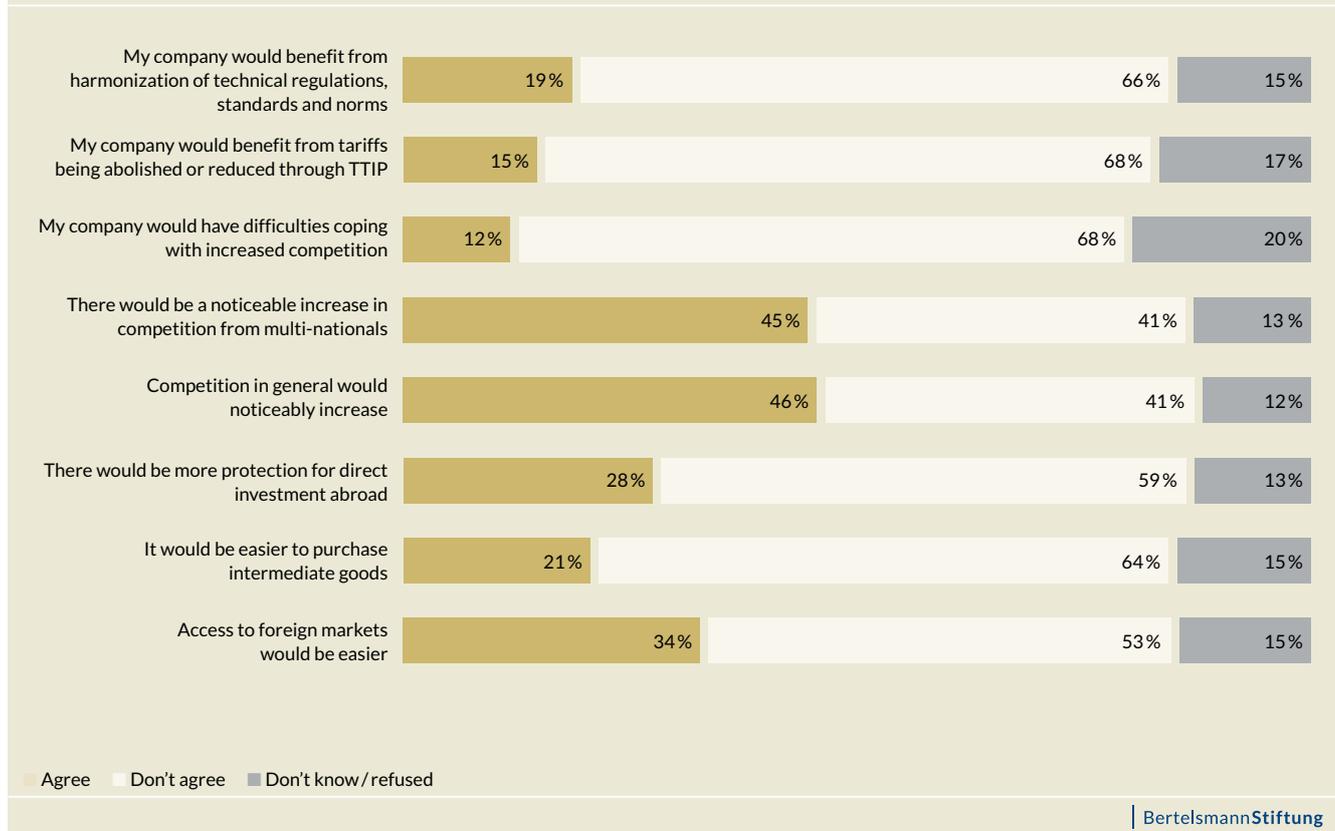
survey on which this study is based, respondents' uncertainty in particular has increased, with certainty among both supporters and opponents falling by about 10 percentage points on each side.

The latest survey available on the issue of TTIP was carried out by the Forschungsgruppe Wahlen research group in February 2016 (Figure 34). According to this survey, approval of TTIP is even lower in Germany than is shown by the YouGov survey.

Businesses also increasingly skeptical

Additionally, there have been some surveys that have examined approval of TTIP in German businesses. Two such surveys were carried out in the second half of 2014, one by the Association of German Chambers of Commerce and Industry (DIHK) and one by the Führungskräfte Institut. These surveys do not provide a consistent picture. In

Figure 37: BVMW Survey



the DIHK survey, which covered German companies which were active abroad, TTIP was welcomed by an overwhelming majority (Figure 35). By contrast, the Führungskräfte Institut shows a different picture. In this case, the majority of managers interviewed actually held negative opinions. According to the Führungskräfte Institut, this disapproval was mostly based on political concerns—about negotiations taking place behind closed doors, investor protection, etc. (Figure 36). A survey by the German Association for Small and Medium-Sized Businesses (BVMW 2016) also presented a mostly negative picture. According to this survey, SMEs expect only a small positive effect from TTIP, through the lowering or abolishing of tariffs or the harmonization of regulations. Furthermore, they fear an increase in pressure from competition (Figure 37).

Europe mostly welcomes TTIP, with Germany and Austria particularly skeptical

Naturally, a number of surveys have also been carried out at an E.U. level. In 2014 and 2015, Eurobarometer collected information on public opinion in E.U. countries. As shown in Table 3, in most countries the majority have a positive view, although approval is falling in most European countries.

Table 3: Approval and disapproval of TTIP in E.U. countries, with changes compared with the previous year (2014).

	In favor		Against		Neither for nor against	
	2015 (EB 83)	Change since 2014 (EB82)	2015 (EB 83)	Change since 2014 (EB82)	2015 (EB 83)	Change since 2014 (EB82)
EU28	56	-2	28	3	16	-1
Belgium	53	-13	35	9	12	4
Bulgaria	67	3	15	1	18	-4
Czech Republic	62	0	23	-2	15	2
Germany	31	-8	51	10	18	-2
Denmark	66	-5	18	1	16	4
Estonia	63	-9	14	3	23	6
Ireland	77	6	12	-3	11	-3
Greece	66	5	28	-4	6	-1
Spain	63	0	19	0	18	0
France	53	3	33	1	14	-4
Croatia	63	-4	26	3	11	1
Italy	58	0	24	2	18	-2
Cyprus	64	5	21	-4	15	-1
Latvia	62	-4	21	3	17	1
Lithuania	79	0	7	-2	14	2
Luxembourg	37	-3	49	6	14	-3
Hungary	63	1	26	-2	11	1
Malta	79	4	7	-4	14	0
Netherlands	63	-11	27	9	10	2
Austria	23	-16	67	14	10	2
Poland	71	-2	14	3	15	-1
Portugal	60	0	23	0	17	0
Romania	78	3	10	-1	12	-2
Slovenia	46	-11	42	11	12	0
Slovakia	56	-6	29	3	15	3
Finland	58	-4	22	1	20	3
Sweden	64	5	23	-3	13	-2
United Kingdom	63	-2	20	1	17	1

Source: Eurobarometer (EB) 2015

6. Conclusion

This study examines public opinion on free trade and TTIP in Germany and the United States. It is clear that increased trade is basically welcomed in both countries, but there is a significant and increasing share of the population which is not in favor of increased trade.

Although increased trade between Germany and the United States is generally welcomed, TTIP is met with disapproval in Germany. The reason for this are concerns about a possible weakening of product and social standards and the legal system. It has been possible to observe a clearly negative trend during the TTIP negotiations with respect to public opinion on TTIP. In the United States, positive and negative opinions on TTIP are equally strong. Also, in the United States, there is less confidence in European standards. Generally speaking, in Germany as well as in the United States, a large part of the population does not wish to express an opinion on TTIP, even though the issue generally provokes great interest. This indicates that many respondents do not feel sufficiently well-informed.

By comparison, the majority of EU member states is in favor of TTIP, while respondents in Germany are among those which hold a particularly negative position. However, a slightly negative trend can be observed even for Europe as a whole.

The policy implications are clear. So far, it has not been possible to convert the generally positive opinion on increased trade into support for TTIP. Many people do not feel sufficiently well-informed about TTIP and furthermore, they are concerned that Europe's high product and social standards might be watered down. Efforts from politicians to communicate better on TTIP have not been considered sufficient. As a result, disapproval is on the increase. In order to prevent public opinion becoming even more negative, it is important to provide better information about the actual contents of TTIP and to ensure that citizens' concerns are taken into account in the negotiations.

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