

SEPTEMBER 2024 | NATIONWIDE OPINION SURVEY

The Image of Germany in Greece

How do Greeks perceive Germany in 2024

Main findings report, TIF 2024

GERMANY vs. GREECE



Survey Details

Agency	Kapa Research
Principal	Friedrich Ebert Foundation (Greece)
Survey type	Quantitative opinion survey on the image of Germany in Greece
Sample	Men and women, 17 years old and above
Sample size and coverage	1002 respondents nationally, representative of the total population
Data collection period	17 – 24 June 2024
Sampling	Multistage sampling using quotas with respect to geographical distribution, gender, and age of the population based on the 2021 census of the Hellenic Statistical Authority (ELSTAT). Data are weighted by gender, age, region and the 2024 EU Parliament election results (raking)
Data collection method	Data collection implemented through a digital questionnaire (CAWI) addressed to members of Kapa Research inhouse online panel.
Error and rounding	Standard error of 3% with a confidence interval of 95%. Results (%) are rounded to 1% and <u>answers may not add up to 100%</u>
About Kapa Research	A member of the Greek Association of Opinion and Market Research Companies (SEDEA). Complies with the ESOMAR codes of conduct and publication of opinion surveys

Key research questions

The Image of Germany in Greece

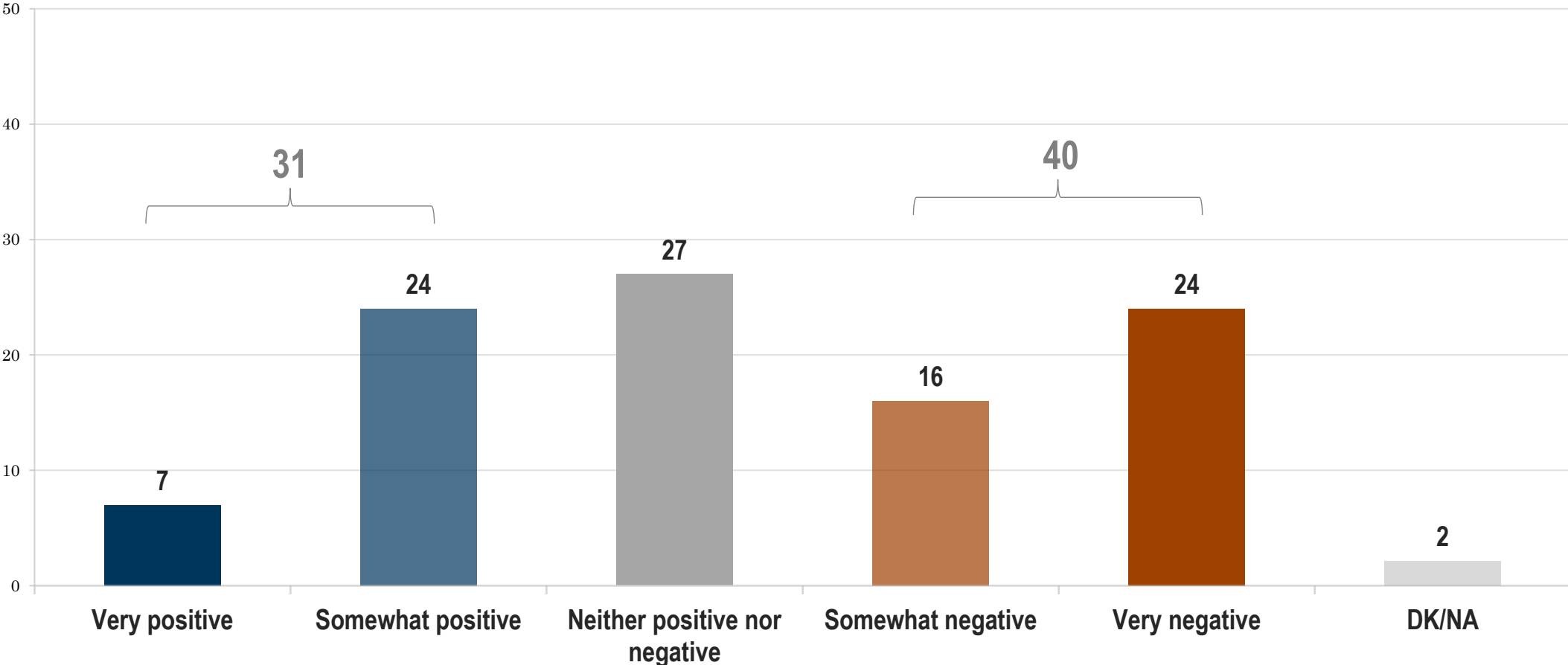
- 1** How do Greeks perceive Germany in 2024 and how opinions have changed under the current coalition government in Germany?
- 2** What are the main factors shaping Germany's image, either positive or negative?
- 3** What is the current status of Greek-German economic relations and how is Germany's impact on the Greek economy perceived?
- 4** What are the preferences of the Greek consumer regarding German products?

SECTION 1: The image of Germany

- Germany's popularity and most popular traits
- Common perceptions about Germany
- Factors leading to positive or negative opinions

GREEK PUBLIC OPINION OF GERMANY NOW BALANCED

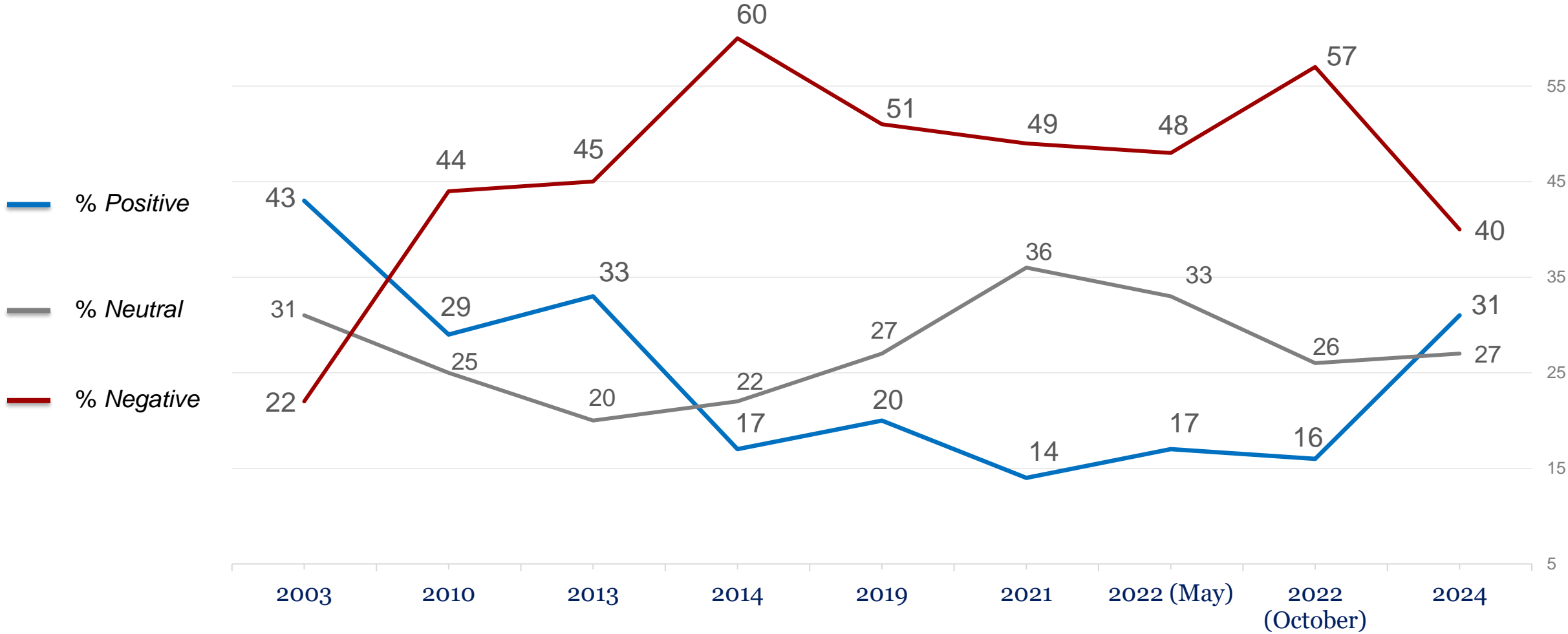
In general, what is your opinion about Germany? Is it positive or negative?



GERMANY'S IMAGE IN GREECE RECOVERS AFTER 10 YEARS

Time-series data

Source: Kapa Research archives

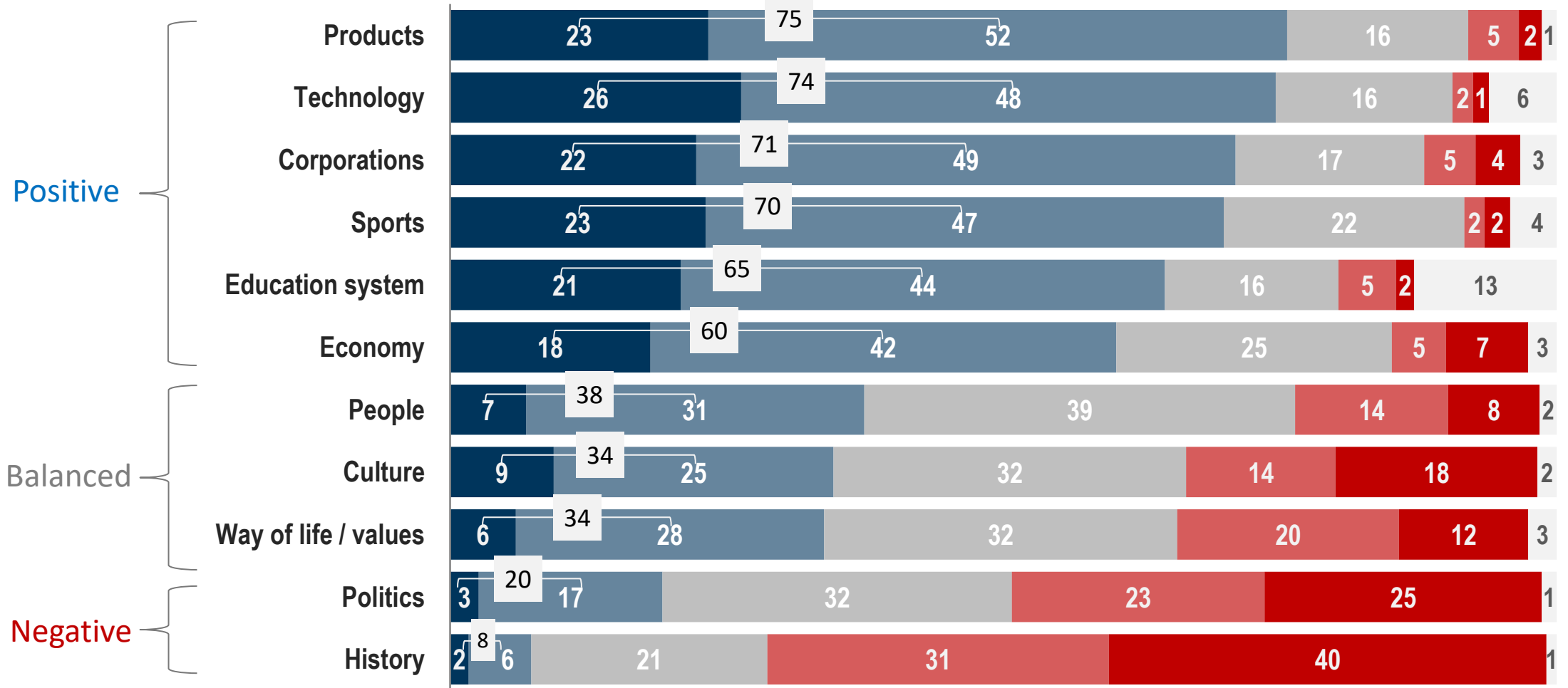


OPINION ON GERMANY'S INDIVIDUAL FEATURES AND TRAITS

Talking about Germany, what is your opinion on each of the following?

The German....:

■ Very positive
 ■ Somewhat positive
 ■ Neither positive nor negative
 ■ Somewhat negative
 ■ Very negative
 ■ DK/NA



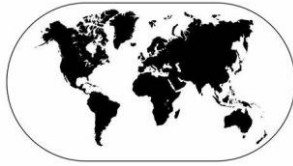
PERCEPTIONS OF GERMANY

For each of the following opinions about Germany, please indicate whether it expresses - or not - your own opinion of this country today:

For me, Germany today is....:

Internationally

(Strongly agree & Agree)



A leading country in the EU

74%

An important economic player and investor

70%

A nation of science and technology

66%

A source of stability in world affairs

35%

A nation of culture and values

28%

In relation to Greece

(Strongly agree & Agree)



A source of tourism for Greece

81%

The home of many Greek immigrants

79%

King Otto's place of origin

53%

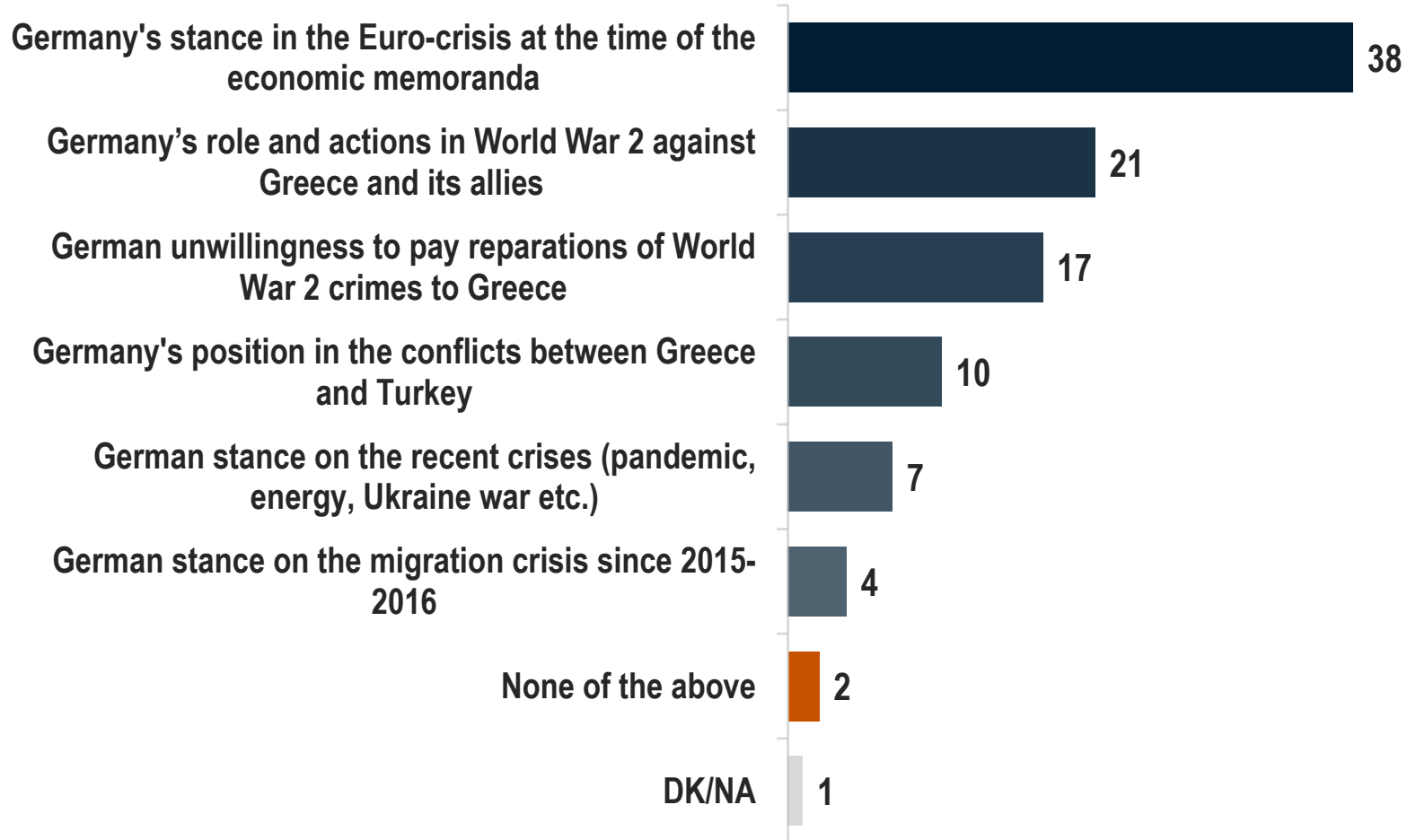
A strategic partner of Greece in international relations

33%

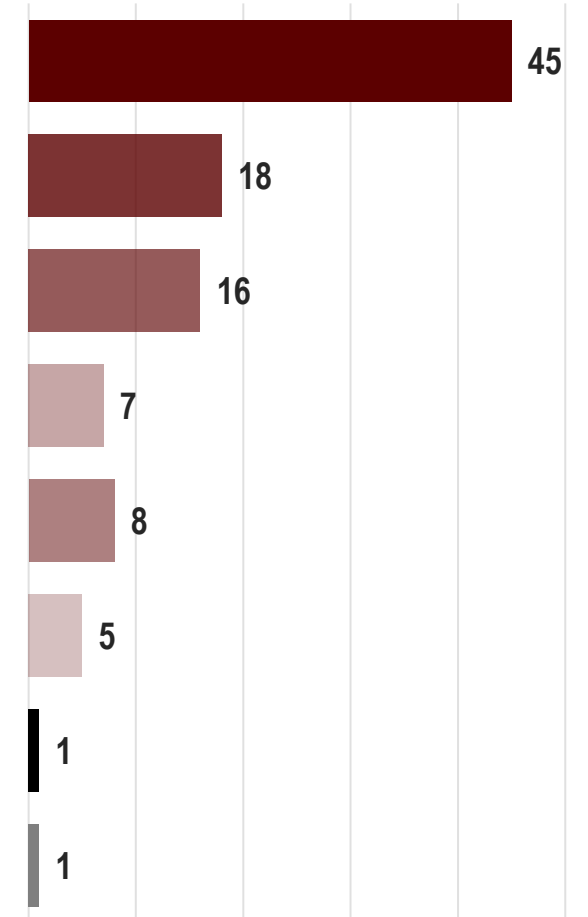
FACTORS SHAPING THE NEGATIVE PERCEPTION OF GERMANY

And if you had to pick one of these, which one has negatively affected your view of Germany the most?

BASE: Total sample

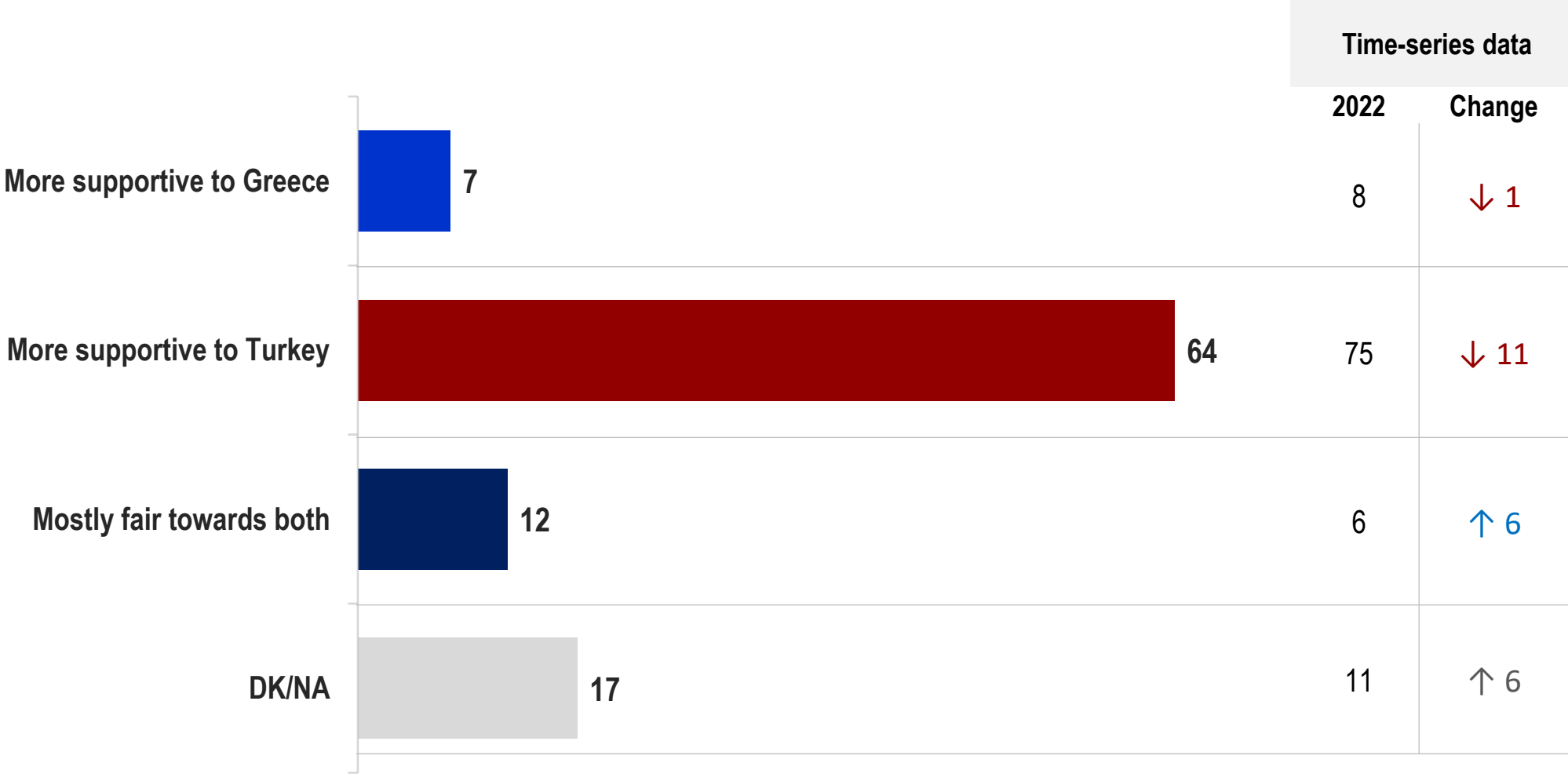


BASE: Those with a **negative** opinion about Germany (40%)



OPINION OVER THE STANCE OF GERMANY ON GREEK-TURKISH RELATIONS

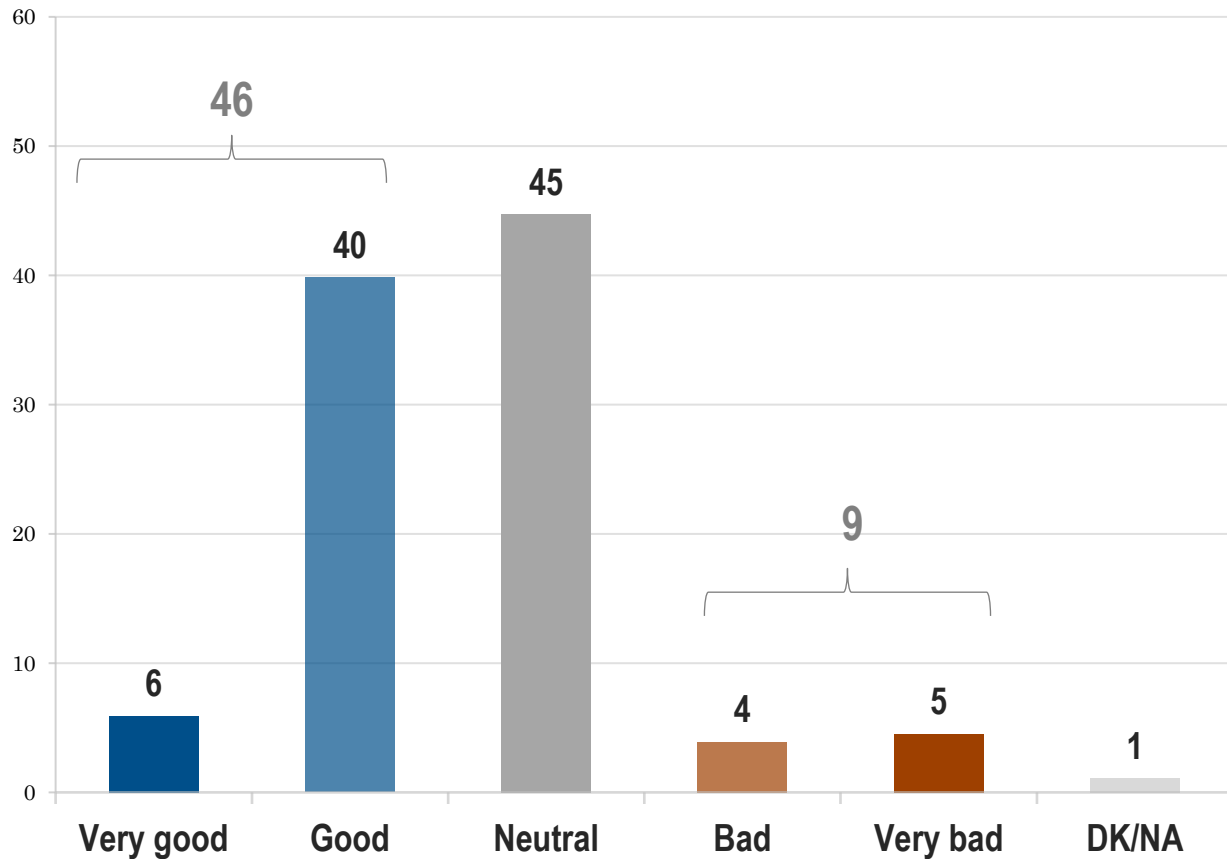
More specifically, when it comes to Germany's stance on the Greco-Turkish relations, do you believe that Germany is...:



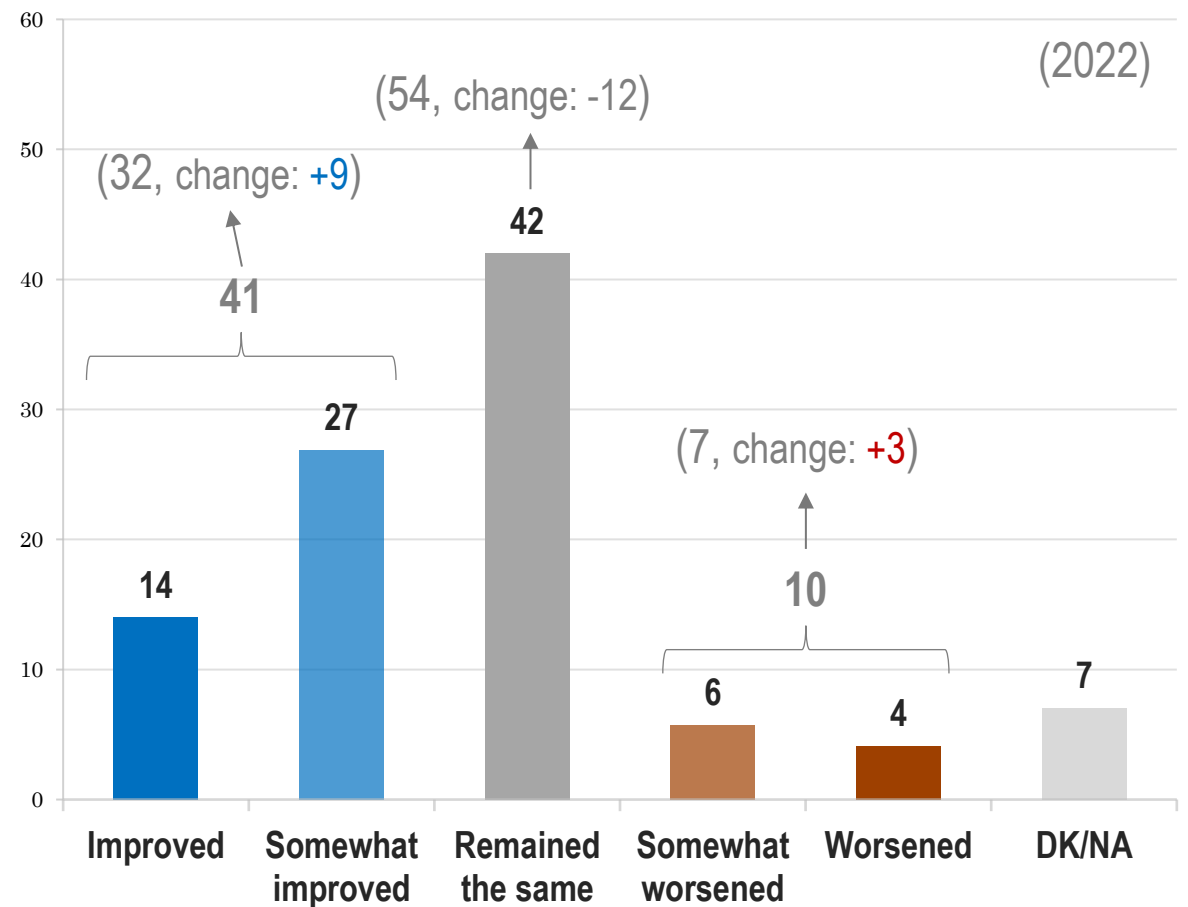
PERCEPTION OF CURRENT STATUS OF GREEK-GERMAN RELATIONS

Today + change under the current German government

Generally speaking, how would you evaluate Greek-German relations today?



In your opinion, how have things developed between Greece and Germany under the current German government?



SECTION 2: Greece-Germany economic relations

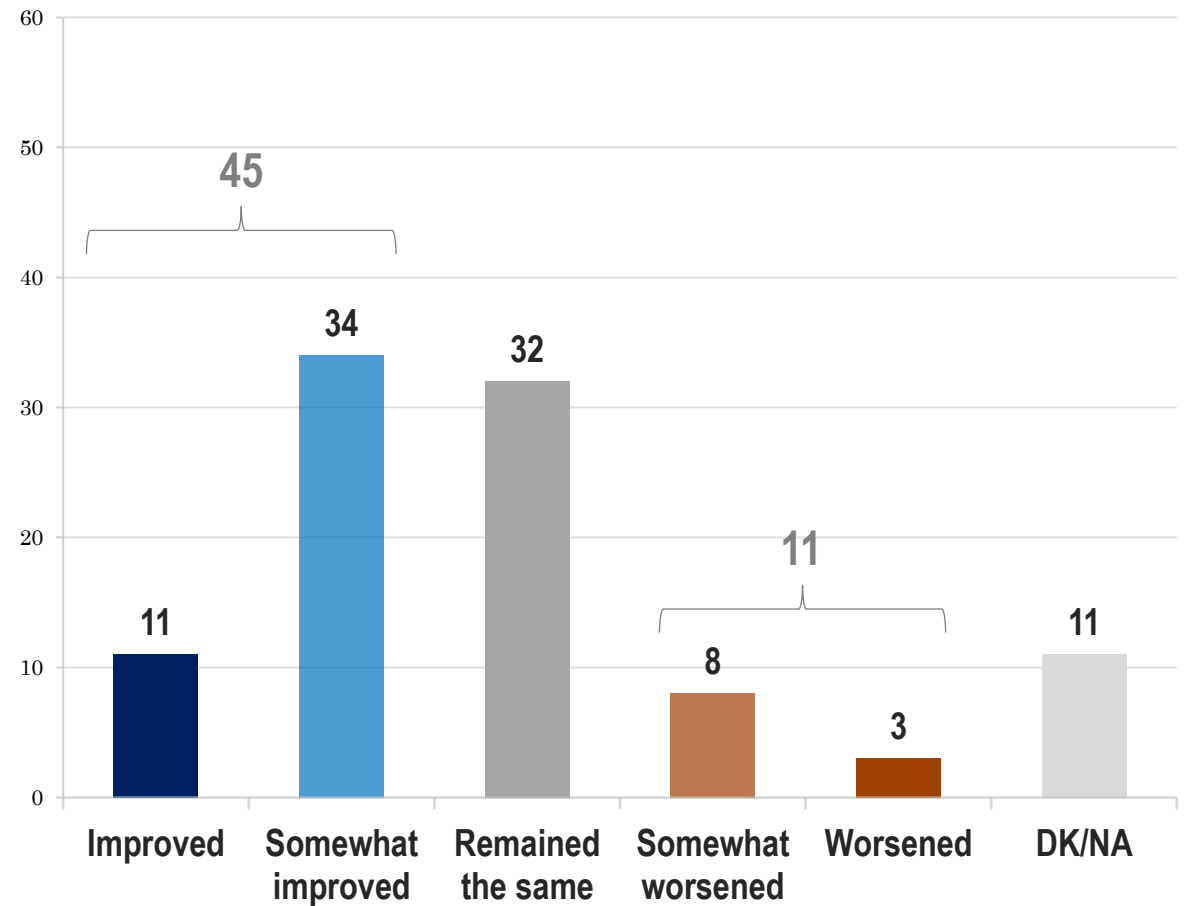
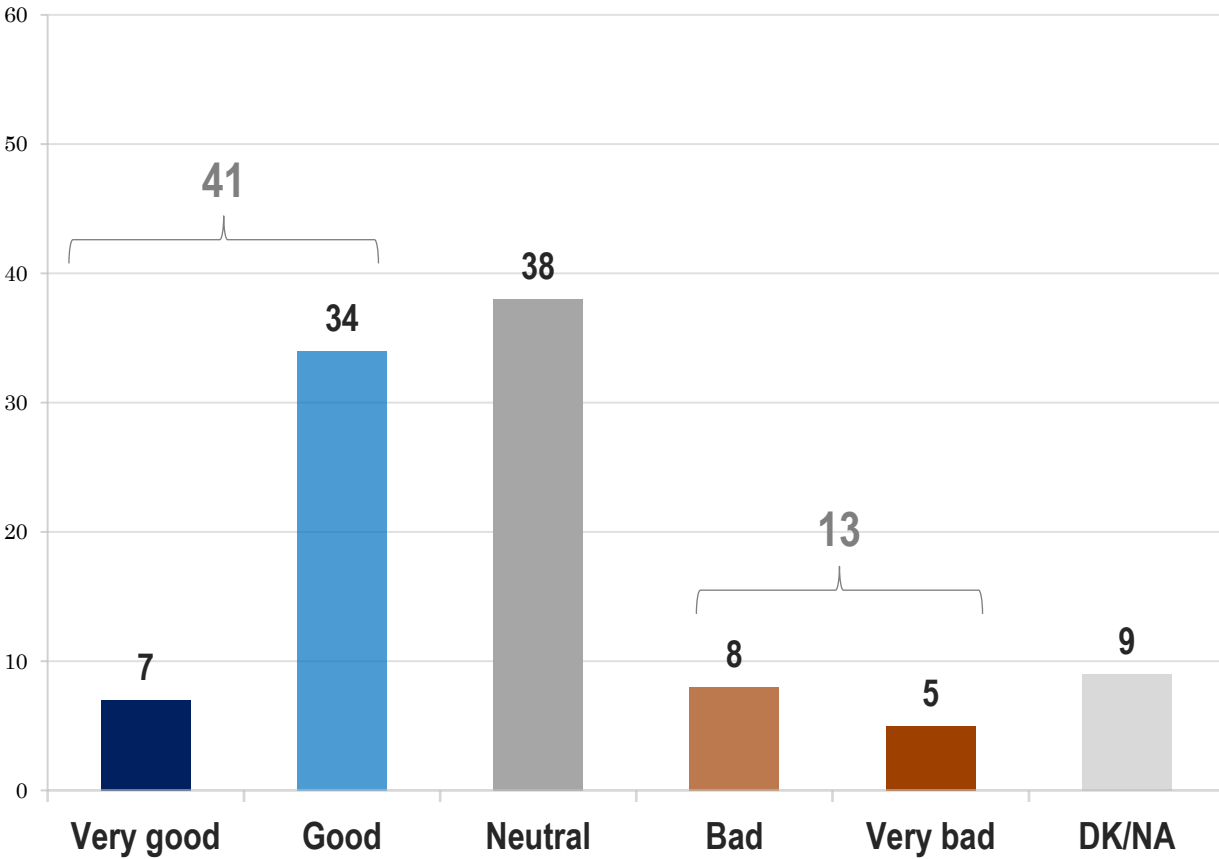
- Greek-German economic relations today and over time
- Impact of German investments in Greece
- Impact of German technology and expertise in Greece

PERCEPTION OF GREEK-GERMAN ECONOMIC RELATIONS

Today + compared to 10 years ago

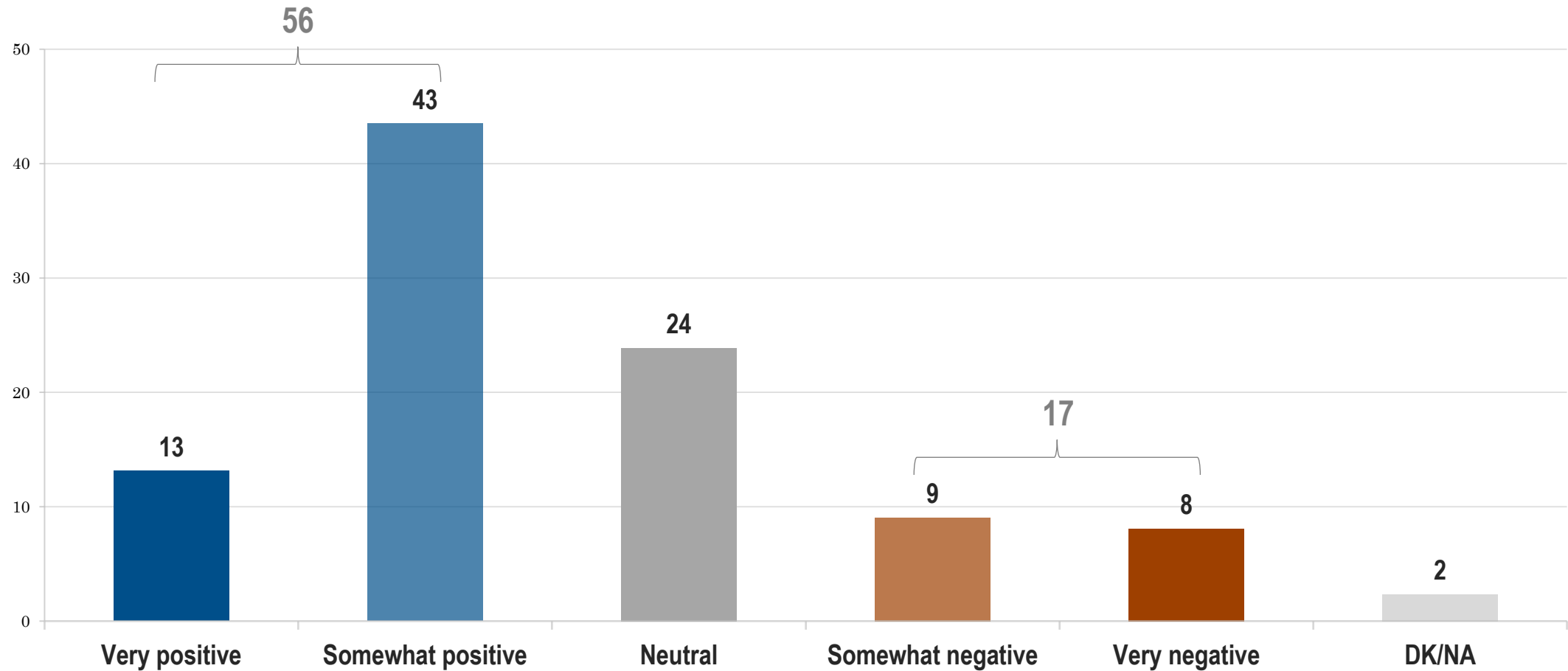
How would you evaluate Greek-German relations on the economy today?

Compared to ten years ago, in your opinion, how have things developed in Greek-German economic relations?



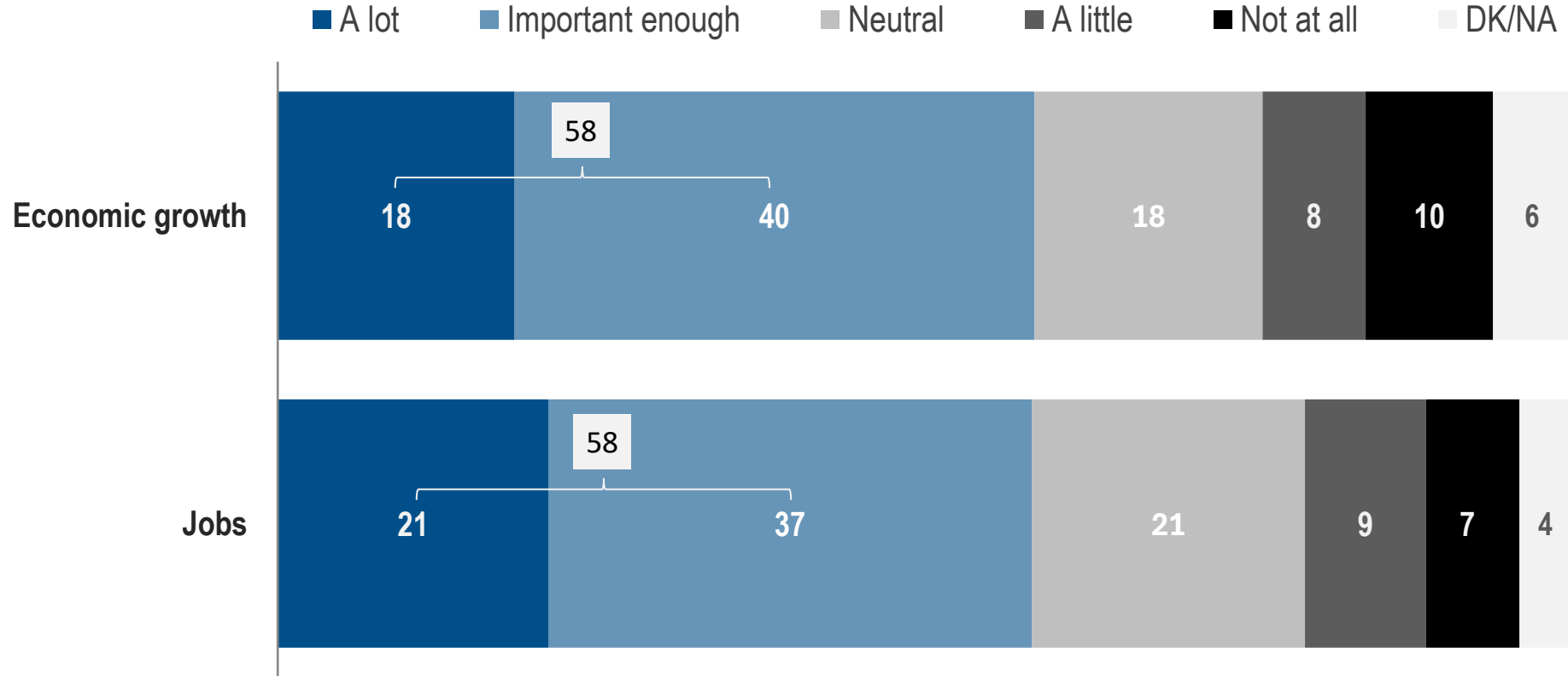
EVALUATION OF GERMAN INVESTMENT IN GREECE

Over the years, Germany has been a systematic investor in Greece. How would you evaluate the presence of German investment groups in Greece?



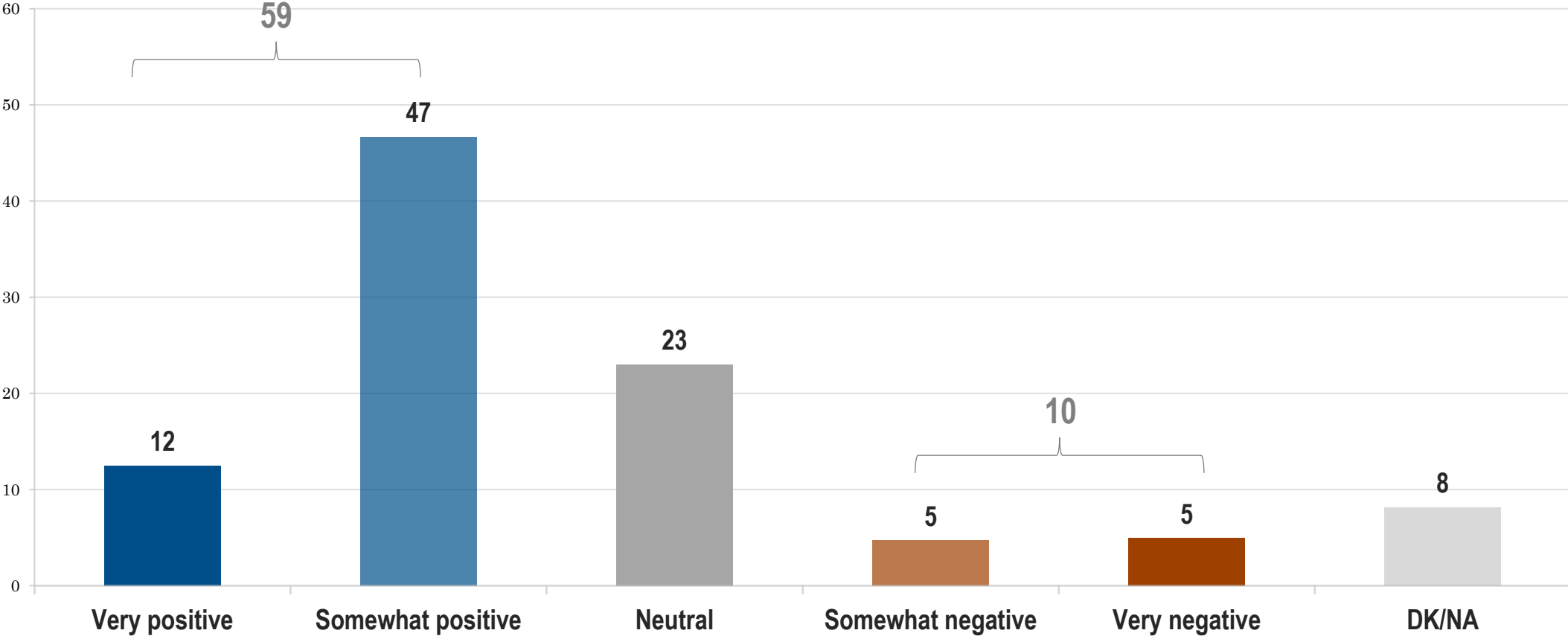
IMPORTANCE OF GERMAN INVESTMENTS IN GREECE

In your opinion, how important would you say German direct investments in Greece are, in the following areas?



IMPACT EVALUATION OF GERMAN TECHNOLOGY AND EXPERTISE IN GREECE

How would you evaluate the impact of German technology and expertise on the Greek market and economy in general?

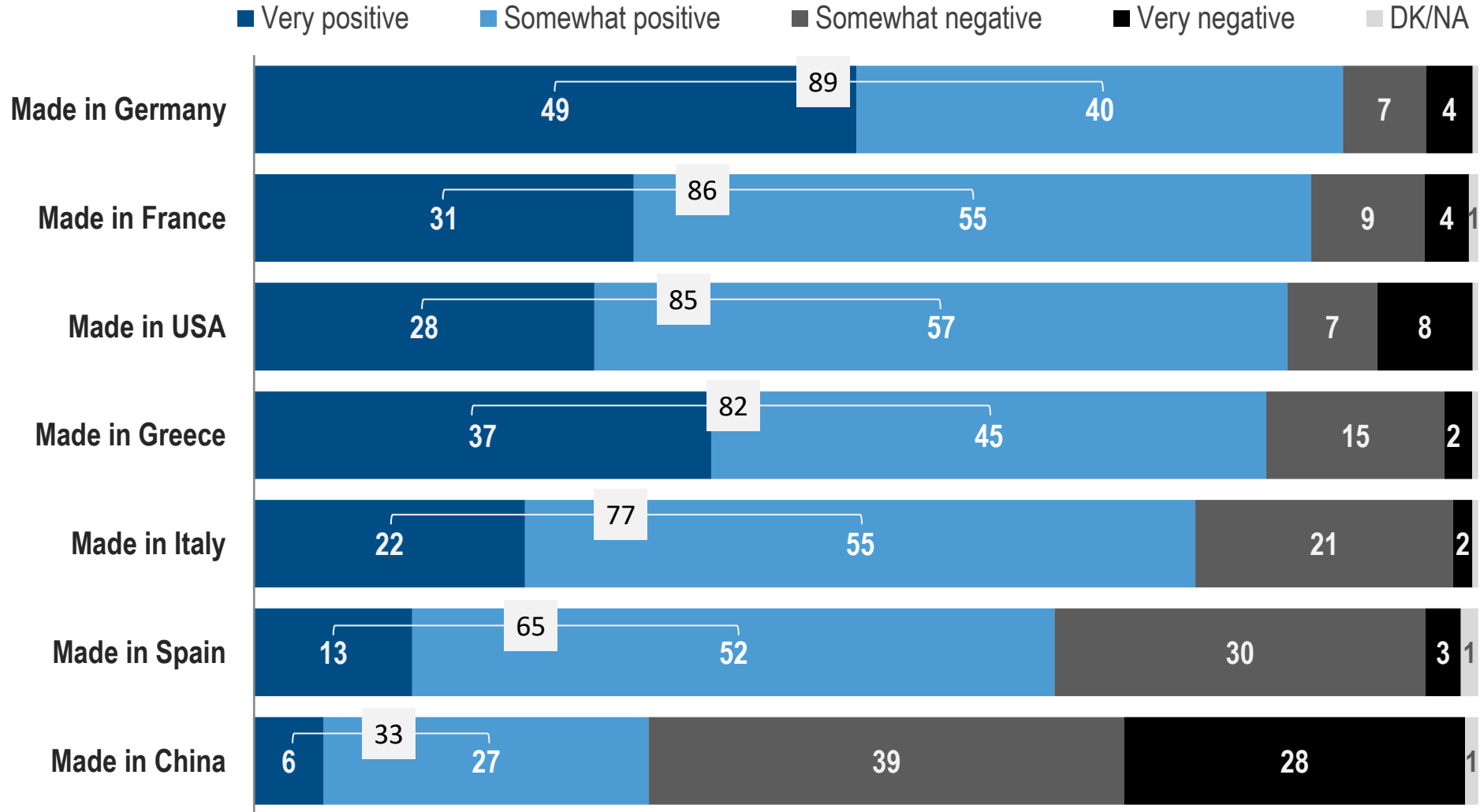


SECTION 3: Consumer preferences

- Most popular “made in [country]” labels
- Most popular countries of origin for a variety of products

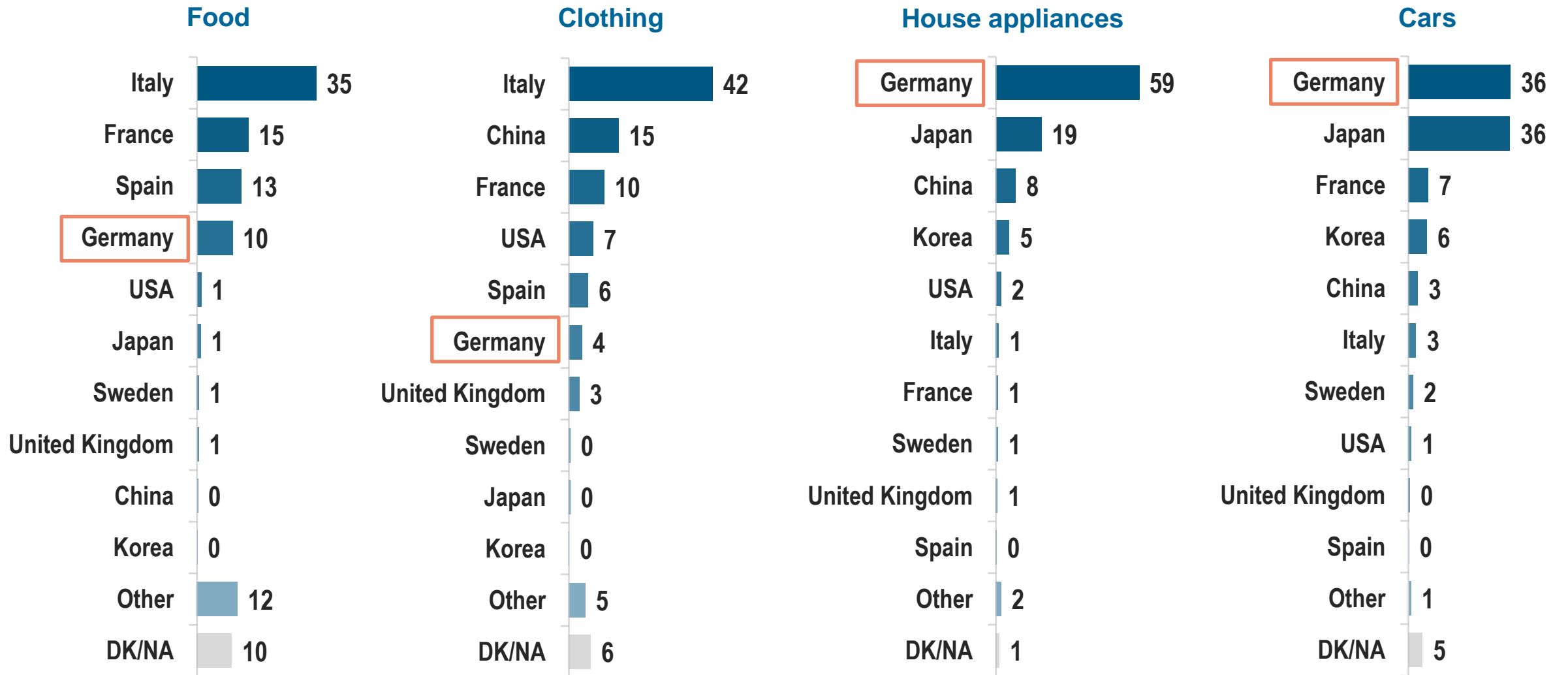
“MADE IN...” LABELS POPULARITY

What is your opinion of each of the following labels?



MOST PREFERRED COUNTRY OF ORIGIN PER PRODUCT CATEGORY (1/4)

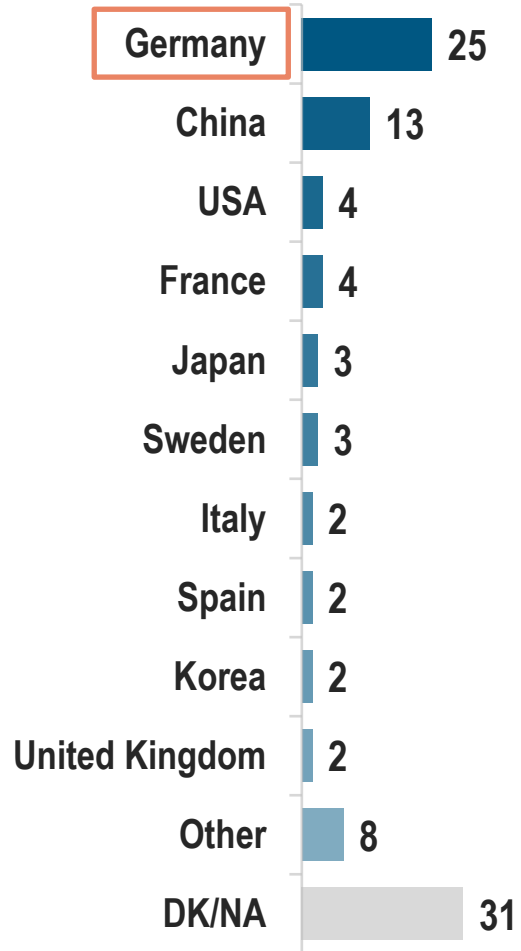
For each product category, which country of origin would you prefer?



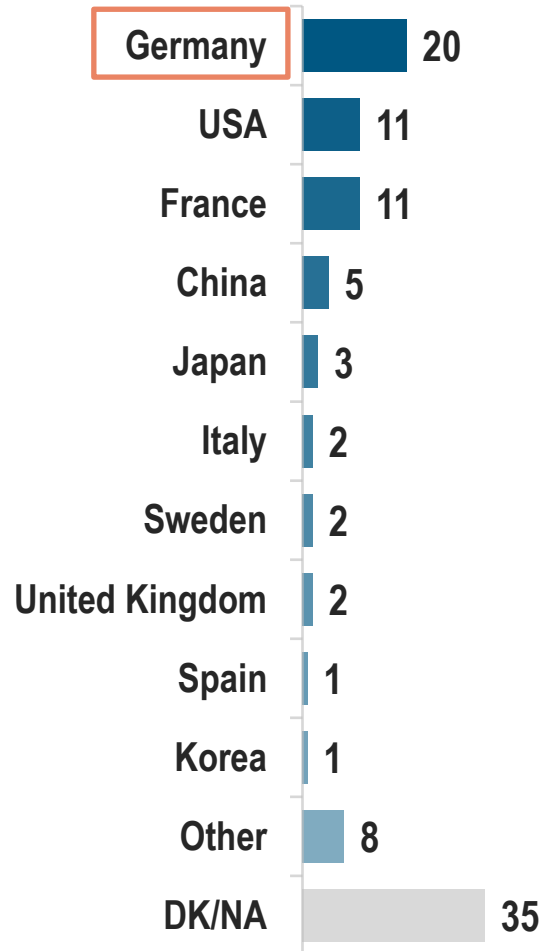
MOST PREFERRED COUNTRY OF ORIGIN PER PRODUCT CATEGORY (2/4)

For each product category, which country of origin would you prefer?

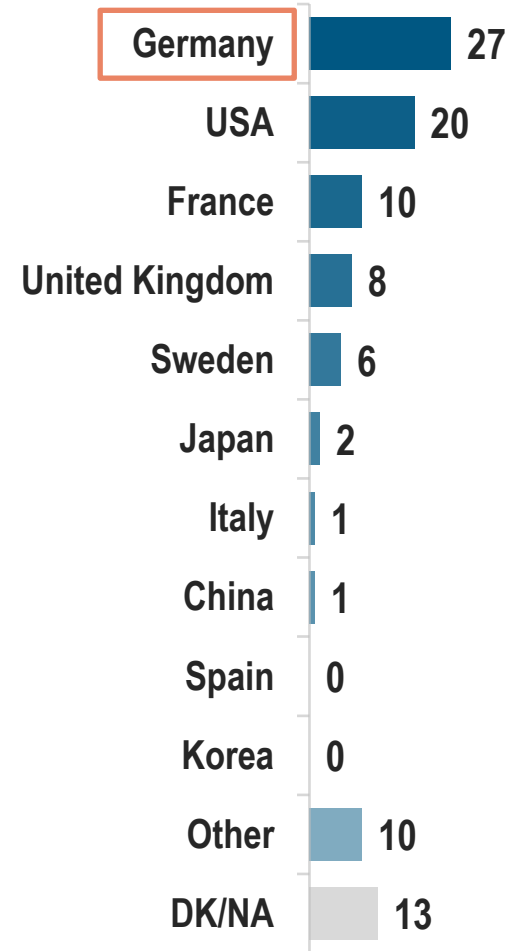
Manufacturing products



Chemicals



Medical / pharmaceuticals

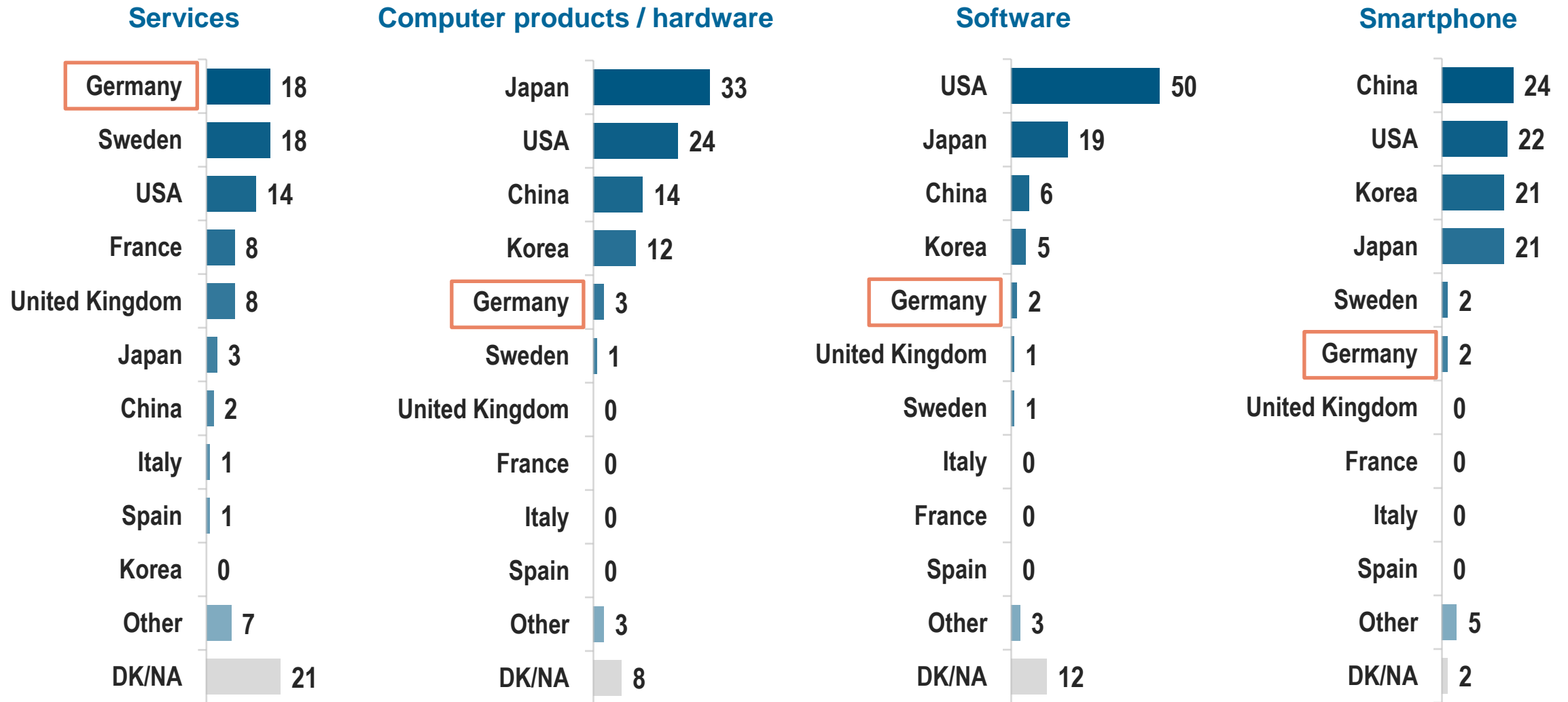


Military equipment / defense



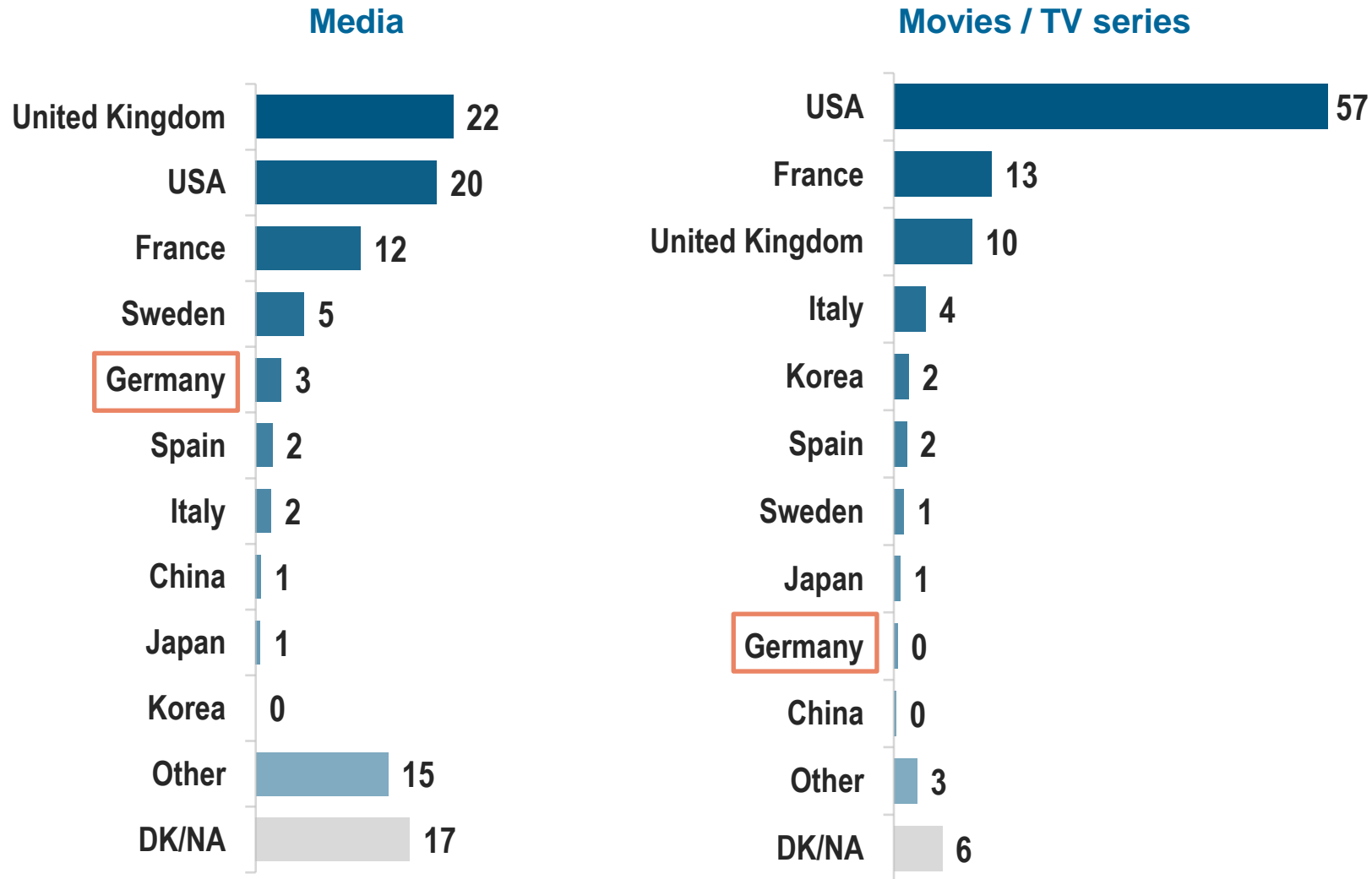
MOST PREFERRED COUNTRY OF ORIGIN PER PRODUCT CATEGORY (3/4)

For each product category, which country of origin would you prefer?



MOST PREFERRED COUNTRY OF ORIGIN PER PRODUCT CATEGORY (4/4)

For each product category, which country of origin would you prefer?



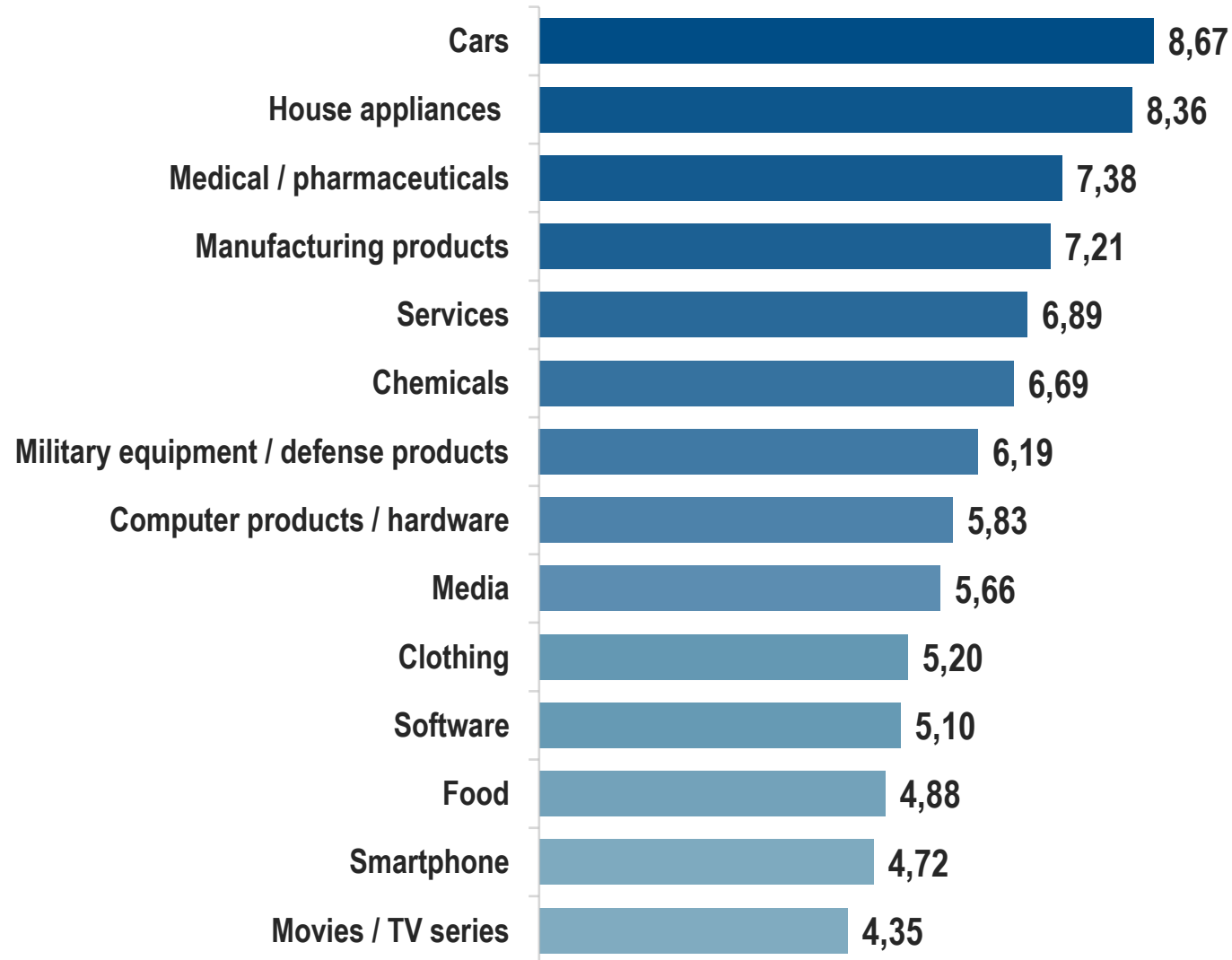
Germany ranks **1st** in **6/14** product categories

GERMAN PRODUCTS RATING

On a scale of 0 to 10, how would you rate each of the following German products?

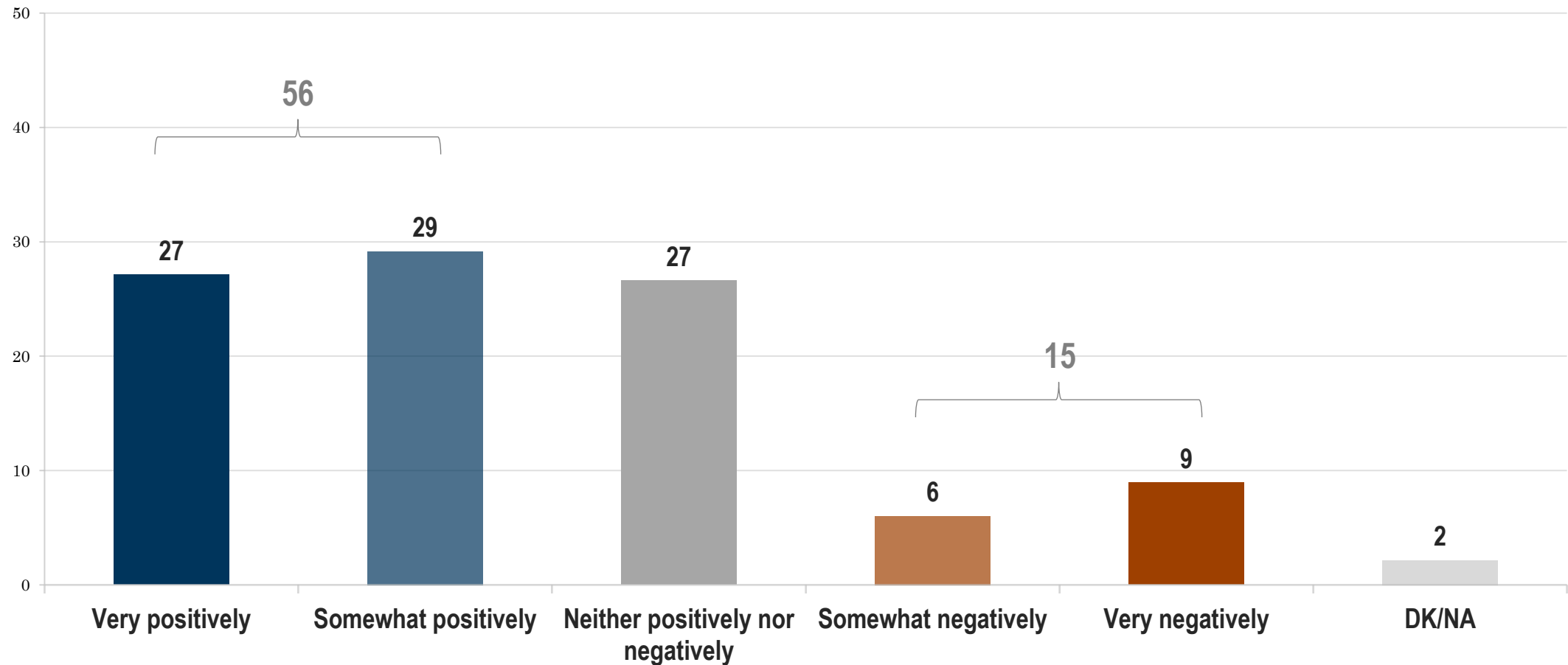
AVERAGE

6,2/10



WORKING FOR A GERMAN COMPANY

How would you deal with the possibility of working for a German company in Greece, in Germany or in another country?



SECTION 4: Key findings

Key findings and remarks (1/3)

The Image of Germany in Greece

1 The image of Germany in Greece is multi-faceted – composed by many and different elements – but it is also contradictory: History and "Modernity" collide almost head-on.

- +
 - ✓ The common project of European integration unites the two nations – for Greeks Germany is leading the way
 - ✓ Germany perceived as an economic and technological power with a model education system
 - ✓ Strong economic ties: popular “made-in Germany” products, reputable German brands, German investments, and source of tourism
 - ✓ Germany seen as the second home of Greek immigrants

- History weighs disproportionately negatively:
 - i. WWII
 - ii. Stance on the Greek crisis (2010-2018)
 - iii. Stance on the Greek-Turkish relations

Key findings and remarks (2/3)

The Image of Germany in Greece

2 The image of Germany in Greek society has improved significantly over the last two years: up 15% in popularity, down 17% in negative sentiment.

- Time heals...: distance from the Greek financial crisis.
- The protagonists of the traumatic bailout period are out of the picture.
- Greek-Turkish tensions have subsided over the last two years.
- The invasion of Ukraine has rallied the West, also bringing Greece and Germany closer together.
- In recent years, Germany is being tested economically and politically, and this creates empathy and, by extension, sympathy in the Greek public opinion.

Key findings and remarks (3/3)

The Image of Germany in Greece

3 Data reveal the appropriate way forward for Greece and Germany:

Less History, more Economy, more Culture.

Thank you.



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