



# **Evaluation of the European Commission corporate communication campaign**

COMM-A1/20/2014-LOT1

Final Report – Annexes Part 1

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**Deloitte.**



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## 1. Annex 1A: Campaign launch event reports

The full reports of launches in Berlin, Helsinki, Lisbon and Warsaw were presented in the Annexes to the Inception report. The two remaining reports: for Madrid (which was developed based on the available documentation and interviews, not observation, as the launch had taken place prior to the start of this evaluation study) and for Riga were included in the Annexes to the Interim report.

### 1.1 Berlin, Germany

#### 1. Introduction

Date	14 November 2014
Location	Berlin
Name of Coffey / Deloitte rep	Aleksandra Małecka

The event was held at the central train station in Berlin (Photos 1 and 2 overleaf). The place of the exhibition of the artwork was chosen as the meeting point where journalists were welcomed by HAVAS staff. The topic of the event concerned the digital age and what the EU does to enable digital citizens.

The artwork (by Manfred Stader) was an anamorphic fresco using a tri-dimensional illusion to show what is behind the scenes of daily digital activity (flowing data, signals, codes). It was displayed on the floor with a gate at one side from where people were expected to observe it. There was also a flag of the EU, the campaign logo ('Europäische Union für Sie da'), and a short bio of the artist (please refer to the Photos in section 6).

After 25 minutes, the attendees moved to the venue of the press conference (also in the building of the train station). The speakers at the conference were, namely:

- Richard Kuehnel, Head of the EC Representation in Germany: Introduction
- Prof. Dr. Gesche Joost, Digital Champion Germany: The future of a digital Europe
- Felix Braun, Head of "Online-schlichter.de": Online-shopping and settlement
- Simon Schäfer, Investor and entrepreneur, Co-Founder of Factory – a campus for start-ups and mature tech companies in Berlin: Empowerment of the business
- Sixteen Bouygues, Director for strategy and corporate communication at the European Commission: Presentation of the campaign

In his introduction, Richard Kuehnel emphasised the importance of the digital topic for German and EU citizens. The European Digital Single Market could create more jobs and contribute to growth in the European Union of 25-26 billion euro. Mr Kuehnel explained also the situation in Germany: 69% of the society is connected to the Internet and the number of people is still growing. On the other hand, 13% of Germans have never used the Internet. At the end of his speech, Mr Kuehnel introduced the next speaker and moderated the conference until the end.

Prof. Dr. Gesche Joost explained the concept of Digital Champions in the EU Member States. This network contributes to sharing of experiences within the digital domain. She also shared insights on how the work with citizens, entrepreneurs and NGOs should look like to create successful digital society. The concept of inclusive digital society was suggested to offer a lot of possibilities for researchers. Providing access to the Internet has consequences which can become a subject of research. For instance, the fact that elderly people learn to use Internet. Many 'digital' educational initiatives are conducted in Germany by schools and different organisations, e.g. programming courses for children and young people are organised. It was reported to be important to educate young people in the digital domain, since it is estimated that there will be a shortfall of circa 1

million of employees in IT by 2020 in Europe.

Felix Braun talked about cross-border eCommerce and the fact that online shopping is more and more important. He highlighted that there are, subjective barriers to online shopping because people are concerned by the possibility of unsuccessful transactions or even fraud. Mr Braun explained existing settlement procedures applicable to online shopping.

Simon Schäfer elaborated on the importance of start-ups for the German and European economy. He explained how start-ups receive support for implementation of their business ideas within the campus in Berlin, which he created. European start-ups face many challenges in their pursuit of success. Mr Schäfer compared Europe to Silicon Valley in the United States, which was financed by the military for more than 30 years. It was reported that there are unfortunately not enough products such as mobile phones or laptops produced in Europe, but that support for European start-ups can help to change this. The example of support for possibilities to exchange experiences and good practices was cited.

Sixteen Bouygues provided background information on the campaign. She introduced the advertising images and made a reference to the Jean Cocteau quote: "Il n'y a pas d'amour, il n'y a que des preuves d'amour"; there is no Europe, just evidence of Europe. For this reason, it was explained that it is important to inform European citizens about deeds and achievements within the European Union and which take place thanks to European funds.

The videos prepared for the campaign were presented during the press conference, too. This included the German, Spanish and Latvian versions of the video. The website *EU working for you.eu* was presented as well.

## **2. Observations and feedback from the launch event**

*Number of journalists including questions posed:*

Employees of HAVAS, the EC and people from the speakers' organisations attended the event (around 30 people).

According to HAVAS, seven journalists had confirmed their participation, but only four of them attended the press conference<sup>1</sup>; another seven people had expressed their interest. These included people from the news media, online influencers and bloggers dealing with European issues, in particular with the economy, new technologies and digital innovation.<sup>2</sup>

There were no questions asked by the audience after the press conference. This can be considered to be relatively unusual at a press conference.

A digital pack was distributed just after the event. According to PR & SOCIAL MEDIA REPORT of HAVAS from 21 November 2014, 12 online articles informed about the launch event. It was also covered in the social media: on Twitter, on the Facebook website of the Representation of the European Commission in Germany and some people viewed the 'Making of' video on YouTube and the interview with Prof. Dr. Gesche Joost, Digital Champion<sup>3</sup>. This way a quite significant press coverage as a result of the event was achieved.

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<sup>1</sup> According to PR & SOCIAL MEDIA REPORT of HAVAS, 21 November 2014

<sup>2</sup> HAVAS provided the evaluators with the list of people that had confirmed participation and/or had expressed their interest in the event.

<sup>3</sup> HAVAS prepared PR & SOCIAL MEDIA REPORT on 21 November 2014



*Feedback received from HAVAS / EC Representation:*

The staff from HAVAS explained that even though they had had enough time to organise the event, the information about it was disseminated to the press very late – only 5 days before the 14 November. The EC had asked HAVAS to withhold the invitation to the event until the presence of Commissioner Oettinger could be confirmed. Finally, he did not attend.

Staff from HAVAS also indicated that the time plan for the launch events in the different countries was quite tight. This did not allow them to take into account the feedback from past events in the preparation of the coming ones (for example, the event in Helsinki took place 4 days after the Berlin one). In addition to this, HAVAS reported that the EC had asked them to postpone some of the events (e.g. the one in Poland was postponed until December 2015).

PR & SOCIAL MEDIA REPORT prepared by HAVAS on 21 November 2014 included the following conclusions with regard to the press coverage:

- The communication strategy has allowed the European Union to do a first approach of the projects developed in Germany among the European citizens.
- The information is positive in most of the news, describing in all cases the European Union's role.
- Despite a lot of relevant messages a good news hook to reach attention was missing.
- In the first place the real news, i.e. the information campaign, found a media echo in communication and marketing media.

A European Commission official explained that political circumstances had constrained the launch event to some extent:

- **Save-the-date:** the message was not sent out due to internal consultations in the context of the new College taking office. In consequence, the event was not in the press planning. Journalists could not plan ahead to attend.
- **Late sending of the press invitation:** the invitation was put on hold during 5 working days to wait for Commissioner Oettinger's answer on his possible participation. Finally, he could not participate in the launch event. Moreover, the invitation reached the editorial offices at the exact moment when the whole German/international press corps was following the 25th anniversary of the fall of the Berlin Wall. As a result, the invitation went largely unnoticed. At the preparatory stage of the event, the EC had considered postponing it to avoid the overlap. Eventually, it had been decided to go ahead with the event, even though it would make the organisation difficult.
- **Postponement of the media campaign:** the campaign was postponed due to the political linkage established between the launch of the pilot and the College's announcement on the new investment package. In consequence, the launch event lost its *raison d'être* and its newsworthiness, with two weeks between the launch event and the campaign's start instead of 3 days. The event was meant to catch reporters' attention on the eve of the campaign's start.
- **"Hybrid event":** It was not clear whether the event was supposed to be an art performance, public relations event or a political announcement. This type of launch format was unusual for a press conference. In consequence, it was less obvious to news correspondents whether or not the event was relevant for them to cover. In addition, the main topical focus for Germany covered a range of policy fields under the digital umbrella, which resulted in further blurring the messages to get across.
- **HAVAS Hannover instead of HAVAS Berlin:** the fact that the local HAVAS Agency was not Berlin-based was another factor influencing organisation of the event. They had no personal contacts and no close connections with the press circles of Berlin and no experience in dealing with political correspondents/content. As a result, HAVAS Hannover had no capacity to remedy the situation and to win over influential journalists/media with a

short notice.

It seems likely that the launch event in Germany may not have reached its full potential due to the above issues.

### **3. Observations from the art work**

In theory, the venue for the presentation of the artistic piece by Manfred Stader seemed to be well chosen. The central train station in Berlin is a modern building open to the general public and with regular exhibitions of a different type. As HAVAS explained, due to the time of the year, it would not have been possible to organise the launch event outdoors.

However, many travellers walked over the art, which was on the station floor, without paying a great deal of attention. The art work was not really used to best effect at the time of launching the event. This was largely because there were not many attendants in the place of the exhibition at the time. There was also no official introduction or welcome at the artwork to provide more explanation of the concept of the campaign and/or the meaning of the artwork to it (as indicated in the agenda of the event). Only individual 'small-talk' took place between staff of HAVAS, the EC officials and invited participants or passers-by.

As a consequence of the issues highlighted above, passers-by did not show a lot of interest in the artwork. After a while, the attendees moved to the conference room where the press conference took place.

After the press conference, the artwork was on display for one more day. A member of HAVAS staff present at the exhibition venue mentioned that some people had stopped and expressed their interest in the artwork from time to time. They also took Photos. Nevertheless, the engagement from the general public was limited.

HAVAS made a video about the artwork preparation which would be available on DG COMM's website, together with the stories of the other five launch events.

### **4. Observations from the on-the-spot survey**

The survey could not be carried out because passers-by did not spend enough time at the artwork. After the press conference, we invited a couple of people to answer the survey, but they were in a rush and were not eager to express their opinions.

### **5. Conclusions**

It seems likely that the launch event in Germany may not have reached its full potential due to certain political circumstances at the time of the event (please see 'Observations and feedback from the launch event' above).

Nevertheless, despite the low level of attendance, press coverage of the event was achieved through distribution of the digital pack by HAVAS. According to their report, the information was positive in most of the news, describing in all cases the European Union's role.

As far as the art work is concerned, there was limited involvement and engagement from the general public. The art work could have been used to achieve a better effect.

The following recommendations could be made as a result of the launch event:

- An important-person, such as for example the EU Commissioner Oettinger, would attract

the media;

- Invitations and save-the-date message must be sent out well in advance according to the countries established practices;
- The format of the event should be adapted to the message to be conveyed;
- Thematic linkage needs to be clear to the public and the media.

## **6. Photos**

**Photo 1: Artwork by Manfred Stader**



**Photo 2: Display of the artwork at the Berlin's central train station**



**Photo 3: Press conference**



## 1.2 Helsinki, Finland

### 1. Introduction

Date	18 November 2014
Location	Helsinki, Finland
Name of Coffey / Deloitte rep	Kiira Soini

The campaign's launch event targeted at the Finnish press took place in the Lasipalatsi restaurant in central Helsinki on a Tuesday morning. There were about 25 people present including six beneficiaries of EU funding, representatives from three LivingLab organisations and four journalists in addition to staff from HAVAS (10) and the EC (5). The launch event included breakfast and ran for about one hour with the speeches and presentations lasting about 30 minutes. The event finished around 11 am.

The event and the campaign's theme for Finland centred around the funding that the EU has been awarding to a LivingLab R&D hub formed of three organisations: TAMK (**Tampere University of Applied Sciences**), Prizztech Oy (Company focussed on well-being products and solutions), EPTEK ry (Regional Health R&D Centre). The LivingLab has enabled the companies to develop and test their products aimed at improving elderly peoples' ability to live independently and making their care more efficient. The products have been tested by the elderly themselves providing direct consumer feedback to the companies.

The event started with speeches from the Head of the EC Representation in Finland, Sari Artjoki, who spoke in general terms about the EU's work in Finland and the EU's wide demographic shift to elderly people (defined as those over 65). This speech was followed by a presentation of the art piece and a short talk by the artist Juhana Moisander. Finally, the campaign adverts to be disseminated on the Finnish media were presented.

The second speech was from Timo Pesonen, Deputy Director-General of DG COMM. His speech was about his personal connection to the topic, because of his elderly mother suffering from dementia. This made the connection between the EU in Brussels and the EU's work in Finland much more heartfelt.

Following this, representatives from Prizztech, EPTEK and TAMK described their products briefly. The main testimonials were given by six people who had tested the products. They explained what the product was, how they found the idea and use of it. The products included a brain teaser app, a step calculator, an online discussion platform and a simple PC. The testimonials gave a human aspect to the event and the topic and were an engaging part of the launch.

The event started very formally with the EC's speeches and promotion of EU activities. But towards the end, it shifted towards the products and experiences of the beneficiaries using the products. This caused that the main purpose of the event (the launch of the first ever communication campaign on what the EU does in Finland and for Finnish people, as expressed by the Head of the EC Rep) was somewhat lost. Focussing on the elderly was engaging and relevant to all participants, but was discussed on quite generic terms. One journalist noted after the event that the age of 65 is not elderly, but is expected to be a working age with the pension age limit going up globally. The elderly were also discussed as a homogenous group.

There was not a strong connection between the press conference and the art piece displayed in the square outside the Lasipalatsi restaurant. Only a short clip about it was showed during the press conference. Thus, journalists could not see the whole installation unless they went back to the venue independently later that day.

## **2. Observations and feedback from the launch event**

HAVAS had contacted 21 media organisations, but only four journalists were present at the launch event. The low attendance could be attributed to the timing of the event. The invitations had been sent out about 10 days prior to the event, but the launch landed on the same day as the first day of a major international start-up conference (SLUSH) that attracted attendees from all over the world and had the Finnish PM and MPs and industrial leads holding speeches and workshops. Most newspapers prioritised this event.

The journalists present at the event were not allowed enough time to ask questions and the only one posed was linked to the products that had been developed through the LivingLab project. The question posed came from a journalist from the largest Swedish language publication. The response was that over 20 technological solutions had been created including a brain teaser game/app, simplified PC, emergency bracelet alarm, an online conversation platform for elderly, step calculator and an extractor fan that can independently put out a fire.

Immediate reactions from journalists were that this was not an usual EC communications session. This session had been more engaging with the video, companies and beneficiaries being present. The topic was relevant, important and engaging, however journalists were not sure how to use the information provided at the event – whether to write a news piece or build on it in a blog post. Ultimately, it was still a PR event for them.

Since the event on 29 November 2014, three adverts were launched in Finland: one addressing the elderly (main focus for the Finnish audience), one on innovation (Portugal) and one on online money transfer (Germany). All three are dubbed in Finnish with Swedish subtitles and are running at least online as pop up adverts and on major TV channels as adverts. Press received a kit three days prior to the launch of the adverts.

To date, one attending journalist has written a blog post linking to the launch event (Huvudstadsbladet, " Störande diskrepans" 23 November 2014) and Marketing and Advertising (Markkinointi ja Mainonta) online publication has reported on the communication campaign ("EU kertoo tiedotuskampanjassaan "kansalaisten elämään tuomastaan turvasta ja varmuudesta", 19 November 2014).

Also, the companies and TAMK (Tampere Polytechnic University) that attended the launch event have published press releases linking to the Finnish EC campaign page <http://www.epresspack.net/tyota-sinun-hyvaksesi-euroopan-unioni/>.

### *Feedback from HAVAS / EC Representation:*

Staff from HAVAS explained they were looking forward to a higher turnout of journalists and a better event than the one in Germany. They said they had had enough time to alert the journalists about the event and were pleased that the LivingLab beneficiary companies and the end-users were able to attend. By having the end users telling their stories about the products gave the EU-funded projects a more a human face and provided journalists an opportunity to engage and interview them (however, it did not seem that journalists took the opportunity to talk to end-users as they left quickly once the event ended). The launch itself went smoothly although the low turnout of the journalists was a disappointment.

Staff from the EC Rep in Finland was pleased with the execution of the event. It differed largely from the communications events that the EC Rep organises in Finland, which are usually public readings of press releases. She was unsure about how the press would react to it as the topic was broad (including the age bracket) and the event did not deep into, and was limited to displaying some concrete products developed with EU funds. The art piece did not attract the attention she was hoping for as the connection with the EU was not clear and hence did not engage the audience in the right way. The installation itself could have

carried some branding or text to allow people to create the link with the EU.

Staff from DG COMM thought the event went smoothly and seemed to be more successful than the German one, although it had not been attended by many media organisations. The art piece was considered engaging, but not delivering a message targeted to the Finnish audience. Also, the link with the EU was not clear as the signage was not visible enough.

### **3. Observations from the art work**

The art work was large and noticeable and strategically placed in a high footfall area between a main shopping centre and a bus station and the main train station. The size of the projection was about 3m x 2m and placed high (3.5m) so that it was visible from far away. Given that the art work was a video installation, the projection was only visible after the dusk, therefore limiting the number of hours it could be displayed. In November, the sun sets already at 3.30 pm so this allowed for the piece to be displayed only during the commuting hours in the afternoon.

The art piece was about an older man with grey hair and beard looking straight into the camera. He looked healthy and not very old, maybe in his late 60s. The footage was simple, in black/white/sepia colours. The pleasant and peaceful face of the man drew the attention to the video. There was no music, but there are sounds of occasional soft conversations of the man with himself, rustling papers and moving around on the chair he was supposedly sitting on. During the three minute loop the man read an old card, drank coffee and was visited by a woman, nurse and child. The quality of the work was good and the mood was gentle and relaxing.

The art work itself did not include any text or branding. These were placed under the piece – blue and black text on white background and visually/artistically very different from the art piece itself. This included the EU brand, name of the campaign (EU works for you in Finnish and Swedish) and a short explanation in both languages of the LivingLab project and work and funding EU has contributed to support the elderly people in Finland. The way the EU branding and explanation about the art work was positioned did not make it obvious that the two were linked.

Photo of the art piece from the artists' website: <http://www.juhanamoisander.com/>

'The Making Of' of the art piece <https://www.youtube.com/watch?v=w9BWK3wWIFo>

### **4. Observations from the on-the-spot survey**

The art piece attracted lots of attention from passers-by, but as it could be seen from far, people mainly looked at it while walking by. From the surveys, it was clear that the message did not come clear: people enjoyed the art as it had a calm/relaxed mood, but did not engage to the message.

Only one of the 18 people surveyed was able to make the connection with the EU and the piece based on the signage and branding that was displayed below the video. The evaluator surveyed people right next to the text, however only on some occasions, respondents could connect the text and the video, even after reading the signage.

Most respondents were positive about the suggestion of providing more funding to communication activities on how the EU works for Finnish people. Regarding their attitudes towards the EU in general, these were mixed. In few cases, people said to have changed their mind recently towards negative.

In summary, the art piece was engaging, but did not deliver the required messages or promoted the EU work in Finland.

## **5. Conclusions**

The launch event was well organised and had some nice ideas behind it, including bringing the end-users of products that had been developed with EU funding to tell their stories. The art piece was also engaging and pleasing to the public.

However, the launch and the art failed to deliver a clear message to the public and create a link to the EU. The launch event was more of a PR exercise which made it difficult for journalists to come up with a story they could tell in the news, even though the theme (aging population and elderly people in Finland) is very topical and very much discussed in the country. Also, it was not clear if the communication was directed to elderly people themselves, their carers or, for example, people reaching that age soon themselves. A message that could be drawn from the event could have been that the EU is supporting companies to develop products for a growing market (elderly people).

The art piece provided a good opportunity to engage people in positive images and messages about the EU, but the lack of branding within the art work and the poor positioning of the supporting materials made it very difficult to create a link between the two.

The launch did present an opportunity to engage the media prior to the larger media campaign, but the messages remained unclear and the launch of the three videos on three different themes diluted the specific theme that had been selected for Finland (ageing population).



## 1.3 Lisbon, Portugal

### 1. Introduction

Date	20 November 2014 (press conference) & 21 November 2014 (artwork open to the general public)
Location	Lisbon
Name of Coffey / Deloitte rep	Raquel Filipa Goncalves

The event in Lisbon took place at a venue which usually hosts institutional and private events. The first part of the event took place in the morning and was for journalists and invitees only. The artistic installation prepared for the event opened to the public during the afternoon and during the following day.

The identification of EU as the organiser/owner of the campaign was very clear, for example:

- At the entrance of the venue, beside the reception desk, there was the EU banner and campaign logo (“União Europeia Trabalhamos para si”/ “EU Working for you”);
- The press conference stage displayed the EU campaign name and logo, and some key facts about EU project funding were placed in an area visible to the public and easy to pick up by press photos and videos (e.g. number of projects funded by the EU, number of qualified jobs created, amount of EU project funding, etc.);
- There were banners with the campaign logos placed next to the three artistic installations.

The event was attended by the European Commissioner for Research, Science and Innovation, who was in Portugal for his first official visit since he took office. This was the main driver of the event's success, being the main focus of media interest and coverage during the entire event. Because he was a former Portuguese Minister who was currently responsible for one of the European offices related to the campaign (Innovation), he was a key asset to capture media's interest and reinforce the message of the campaign's launch event.

The press conference was dynamic; it was short and not very formal. The presentation by the Head of the EC Representation in Portugal was short and focused on the campaign's scope, objectives, Portuguese specific topics and partners, and following promotion actions, without providing too many details. It was evident there was an effort to make it a short and focused presentation, giving short time for questions and answers and including captivating aspects (such as the campaign videos which were presented to finalise the press conference conclusion).

The event had a flexible agenda and journalists had the opportunity to ask individual questions to each spokesperson according to their own interest on the subject and time available.

A clear and focused explanation about the campaign's purpose was provided by the event's speakers:

- To change the public image of EU: less bureaucratic, closer to the general public, with impact on real people;
- To inform the general public about how EU is helping the countries' enterprises and innovation projects;
- Innovation as a key aspect of employment creation and economic growth – specific actions of the EU in Portugal, with measurable results.

The audience's interest decreased during the UPTEC spokesperson presentation because it was longer than the other, less focused on the objectives of the campaign, and with many details about the Centre's activities. Nevertheless, the role of the EU on the project's funding and the direct impact of the Centre on Portuguese start-ups and on

entrepreneurship and innovation promotion was made clear.

It seemed like there was significant interest of the media and invitees on the artistic installation. The media was well informed about the idea behind the artworks and they worked well as a complement for each project presentation during the press interviews (offering an artistic overview). However, there were not enough works to create the impression of a real art exhibition and to communicate a message connected with the EU campaign.

## **2. Observations and feedback from the launch event**

*Number of journalists including questions posed:*

The event was attended by 14 media organisations. The most important and relevant ones were:

- 3 national TV stations (RTP, SIC and TVI)
- 2 national radio stations (Antena1 and Rádio Renascença)
- 1 national news agency (Lusa)
- Main economic press media (e.g. Económico, Observador, Dinheiro Vivo, Oje)

The Q&A session after the press conference was short and allowed for a limited number of questions to be answered by the Head of the EC Representation. The additional questions were posed in one-to-one interviews with the spokespeople, without significant time constraints.

There were three questions during the press conference:

- "During the press conference it was mentioned the objective and the scope of the changes in the EU's communication strategy. Which specific actions will be implemented by the EU?" *Question asked by Agência Lusa.*
- "According to a study recently published (International Innovation Funding Barometer), 8 in 10 companies consider that it is difficult to innovate in Portugal. What is your opinion about that?" *Question asked to the European Commissioner by Observador.*
- "Do you believe that this kind of campaigns will have a significant impact to decrease people's indifference about the European Union?" *Question asked to the European Commissioner.*

The one-to-one interviews were mainly done to the representatives of the funded projects and to the European Commissioner, and lasted for about 30 minutes. According to the projects' representatives, questions were about their projects, the internationalization process and the main achievements. Nevertheless, the main focus of the media questions was on how the EU funds were channelled to their projects.

*Feedback received from EC Representation / HAVAS / Journalists:*

*EC Representation:*

Staff from the EC Representation considered that the launch event was successful overall and that, according to the information he had on prior launch events, it had been attended by a higher number of media organisations. They also mentioned that the objective of attracting media interest had been achieved. However, the effectiveness and results would have to be examined during the coming days, based on effective media coverage and

impact on social networks.

*HAVAS:*

Staff from HAVAS considered that the event went quite well both on technical aspects and regarding media attendance. The person responsible for media relations explained that they had looked for the presence of at least 10 media organisations, and that this had been exceeded. Additionally, a live report was transmitted by one of the main morning TV news shows that attended the event. The presence of the Research, Science and Innovation Commissioner at the event on his first official visit to Portugal was considered a strategic asset for media attraction and the main key success factor.

Moreover, for HAVAS, the presentation had a good dynamic, with a participatory and fluid tone. The media expressed interest in the subject and asked several questions to the spokespeople. The main message of the campaign was well communicated, the meaning of the campaign was well explained and the content was transmitted in a focused way.

According to HAVAS, and compared to the launch events in other countries, this had been the most successful one as the main objective of generating media attention had been achieved. Media attendance in other countries was considered to be much lower.

Regarding attracting general public attention, HAVAS explained that it was not the objective of the event. The opening of the art work for the general public during the afternoon and the following day for the general public was considered a bonus. In the other countries, public attraction had not been an objective either, but that aspect was present since the events took place in public areas (e.g. central train station in Berlin). This had not been the case in Lisbon. Nevertheless, a less institutional and more accessible place was selected for the event, and a less formal tone was adopted, in order to support the campaign's message of proximity to people.

For both HAVAS and EC Representation, the less positive aspect of the event was the duration of some speeches (e.g. LNEC president speech), which were less under their control. This presentation in particular was considered to be too long and not very focused on the event's topic, which resulted in a drop in the audience's attention.

*Journalists:*

According to the journalist from Rádio Renascença, the event was interesting and went well. It was not too long and quite entertaining, the venue was a very pleasant room, the art exhibits related with each project and the other decorative elements were also a plus.

The event was less ceremonial and bureaucratic than the usual EU events, with a more light-touch organisation. The objective of explaining to the media the new EU campaign and the role of Portugal in the campaign was fully achieved.

The most positive aspects were the short-duration of the event and the flexibility allowed to journalists. It was given the media the opportunity to calmly speak with all the protagonists according to each journalist's interests and time availability, without the usual restrictions that characterize official events. Despite the European Commissioner was on a tight schedule, he was available to speak with the media before and after the press conference, and adopted a soft tone.

The journalist from *Economico* also considered it a good event, although she did not have previous experience with EU events to draw a comparison. According to her, the main positive aspects were that it was on schedule and that the journalists had the opportunity to talk to all the speakers.

According to the journalist from *Lusa*, it was a well-organized event and the venue was pleasant although with bad acoustic conditions. The Commissioner's statements before the press conference were not in line to the event agenda that caused some issues on

journalists' alignment, but it was possible to speak with him after the press conference. Compared to other EU events, Lusa's journalist did not identify any significant differences.

### **3. Observations from the art work**

From the perspective of the representatives of the funded projects (Like Architects), the fact that the new EU communication approach focused on specific examples and successful case studies could be the best way to spread the message about EU's support to companies and innovation projects. Also, they considered that the event's objective of generating media attention was achieved mainly due to the Commissioner's presence.

Although the venue would be remain open for the general public during the afternoon and during the next day, they did not believe that it would attract a significant number of visitors. Mainly because it was not designed for that purpose. For them, in order to attract the general public, it would be necessary to have a prior advertisement about the event and a more extensive exhibit (with more artworks). Nevertheless, in their view, an exclusive event for media might have been the best choice, since an exhibit for the general public could have a strictly local scope.

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### **4. Observations from the on-the-spot survey**

Only one person from general public was present at the venue the day after the press conference. Thus, there are no significant observations from the on-the spot-survey to report.

*Main perceptions on the public exhibit from the evaluator:*

As a public exhibit, the event was not very successful. The only information available was about the organising entity (EC) and the name of the campaign. The venue was located in a touristic area, but the exhibit opened only during working hours (closed during lunch time). This made it difficult to attract the general public. The few visitors were mainly foreign tourists.

Although there was a large banner outside the venue, visible from the entire square, the main door where the banner was placed was closed and the entrance was in a side door with no information posted. Therefore, many people just stayed near the door, looked inside but did not go in.

The three artworks (without any additional information or exhibits available) were not enough to capture the public's interest. The few visitors took less than a few minutes inside the space and the room architecture seemed to have a higher impact on their attention than the exhibit itself.

As a public exhibit, the message was not clear and not well designed to capture the public's interest and attention.

### **5. Conclusions**

The press conference was considerably successful, in particular because of media attendance. It was well presented and the links to the EU campaign were clear. The less positive aspect was that some presentations were a little too long and not very focused. There was very little involvement and engagement from the general public, although it was stated that this was not an objective of the event.

## 6. Photos

Photo 4: Venue's entrance and campaign banner



Photo2: Artistic installation at the venue's reception area



**Photo 3: Press conference**



**Photo 4: Campaign content and messages**



## 1.4 Warsaw, Poland

### 1. Introduction

Date	1 December 2014
Location	Warsaw (Poland), SKWER (exhibition space in the Old City)
Name of Coffey / Deloitte rep	Karolina Wrona

The launch event took place entirely indoors. There were no members of the general public present. Twenty journalists and 15 other stakeholders were invited, most of whom showed up. Additionally, three beneficiaries of EU funds for entrepreneurship projects attended. The latter did not give speeches, but were available for interviews and a few journalists took up the chance to speak to them.

The speakers at the press conference were:

The Head of the EC Representation in Poland, Ms Ewa Synowiec

The Polish Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, Ms Elżbieta Bieńkowska

The Coordinator for the Enterprise Europe Network in Poland, Mr Michał Polański.

After the speakers' presentations the art performance took place (for a description of it, please refer to section 3 below). This was followed by the usual Q&A with the press. Following this, the official part of the launch event was closed and the journalists were encouraged to interview the beneficiaries of EU funding and the Head of the Rep. Some journalists did so, but most of the attention focused on the Commissioner.

After the launch, the organisers (DG COMM, HAVAS, and the EC Rep) sat together for a detailed de-briefing session.

### 2. Observations and feedback from the launch event

*Number of journalists including questions posed:*

19 media representatives, 9 from TV stations, radios, and Polish written press

*Questions:*

Only the first question posed was related to the campaign itself, the rest were on the current issues to the recently-appointed Commissioner.

Q1 (TV Republika): Will the Commissioner engage in the campaign in person, and if so, how?

The Commissioner responded that her personal engagement in the campaign was limited to participating in the launch, but she stressed that the theme of the campaign (entrepreneurship) was directly linked to her EC portfolio and thus she would be engaged in those issues for the whole run of her term.

The Head of Rep said that the objective of the campaign was to show and disseminate information about the fact that the EU offers financial support to entrepreneurs; she also referred back to the Eurobarometer study showing a high proportion of people with neutral perceptions of the EU.

Q2 (Radio Zet, a pan-Polish radio station): Is there a chance to fight the red tape of "over-bureaucratisation" of the process of entrepreneurs applying for EU financial support?

The Commissioner related this to the fact that most of the EU financial support for entrepreneurs in Poland was from the Cohesion Policy and that this needed quite detailed

regulations. Then she added that during her prior position as Minister for Regional Development, she launched a campaign to simplify the application procedures, and lots of entrepreneurs' suggestions were implemented.

Q3 (radio Talk FM, a pan-Polish radio station): Mr Tusk [Polish PM until a month ago] is starting today his term in the office as the President of the Council. Do you have any wishes and or/guidance for him?

The Commissioner wished that he could realise his vision and not fight with the bureaucrats.

#### *Feedback received from HAVAS / EC Representation:*

The feedback was collected during a debriefing session, which took the form of a *tour de table* with the EC Rep, HAVAS and representatives of DG COMM.

Both the Rep and HAVAS representatives considered the event to have run very smoothly.

The Rep in particular praised the fact that a considerable number of journalists were present and believed this would ensure a very strong media coverage. At the same time, the Rep was aware that the coverage would be mostly about what the Commissioner had said, and not about the campaign itself. However, he believed it would be mentioned that the Commissioner had attended the campaign's launch event. The possible amount of press coverage was linked to the fact that the day of the launch coincided with the day the former Polish Prime Minister Donald Tusk was taking office as the President of the Council.

The Rep was also very appreciative of the fact that the event was held indoors for two reasons. Firstly, it was much warmer – the temperature in Warsaw on the day of the launch was oscillating around  $-7^{\circ}\text{C}$ . Secondly, it made it easier for the media to interview the Commissioner and the Head of Rep. Because of the low noise, they were able to hold longer interviews which could end up as short clips to be presented in the media.

In terms of weaknesses, both HAVAS and the Rep agreed that there had been some difficulties during the preparation of the event, which were related to the "change of command" established for the event. The communication between the four parties (HAVAS Paris and Warsaw, the Rep and DG COMM) slowed things down in various occasions. HAVAS Warsaw had been very responsive during the process, but on some occasions they had to consult with Paris HAVAS before taking some decisions. This was the case for the Rep too, who had to consult/communicate with the central EC level before moving forward with some issues/tasks.

The second issue mentioned was the huge challenge posed by changing the launch topic from agriculture to entrepreneurship, which required changing the stakeholders, journalists, media mapping etc. relatively late in the preparation process.

Another problem which came into light was the fact that HAVAS had hired a translation company for the Polish version of the website, which returned a highly unsatisfactory result and needed to be re-translated.

The recommendations/ lessons learned from both the Rep and HAVAS included:  
1) If the campaign is to be rolled out across all MS, there should be more time between launches in the MS so that all of the parties can prepare better;

2) HAVAS team should consider giving more decision-making powers to their local offices;

3) HAVAS should appoint an internal language supervisor, to avoid the issues with external translation companies delivering poor work.

### **3. Observations from the art work**

The artwork was a flat, round platform placed on the floor. Three devices resembling robot vacuum cleaners with flashing lights on top were moving on top of it. At the beginning, each



robot was moving on their own part of the platform, but as the music progressed, the robots started moving closer and closer to one another. At the end of the performance, the lights dimmed more, the robots were removed and the tracks that they had left behind showed an intricate, interwoven pattern (please refer to the Photos in section 6).

The campaign and EU logos were placed behind the artwork, which made them very visible.

The audience did not seem very impressed. The explanation provided by the artist after the performance made clear what the performance was intended to represent.

#### **4. Observations from the on-the-spot survey**

The survey was not conducted as there were no members of the general public present at the press conference.

There was a plan to invite members of the public to the venue later in the day.

#### **5. Conclusions**

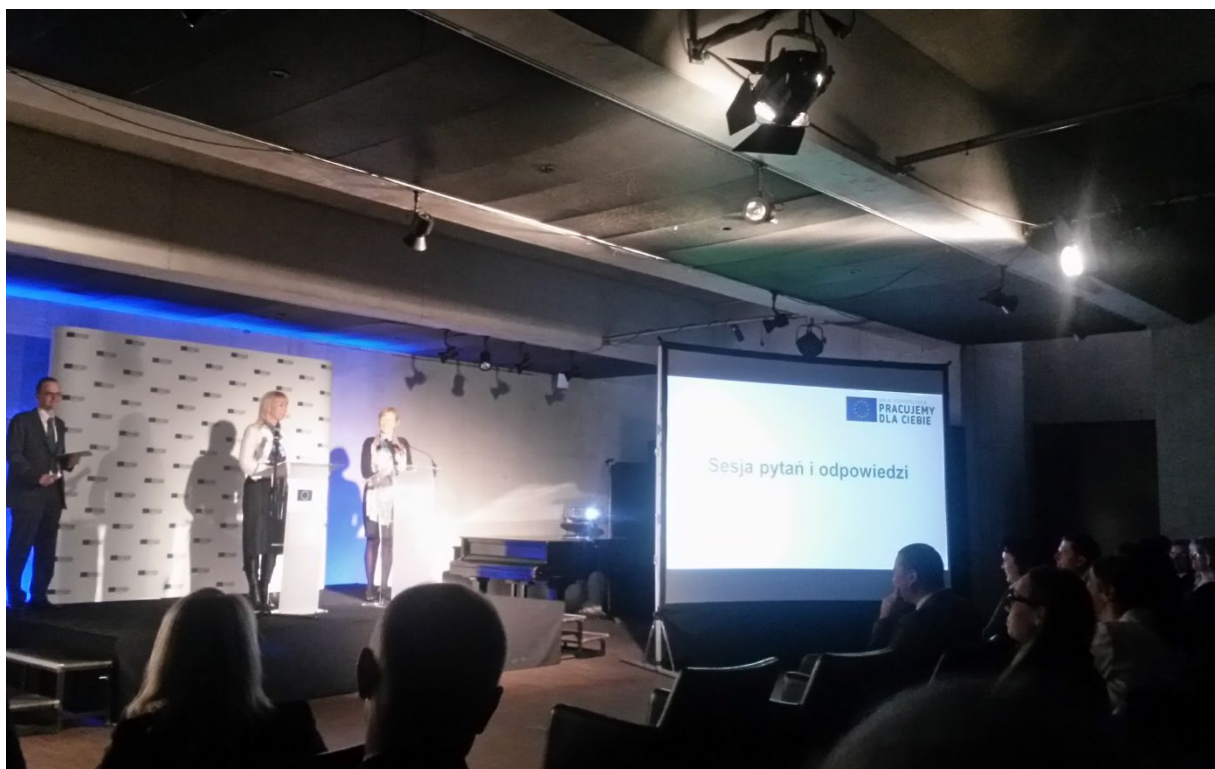
The attendance of the Commissioner who recently took office in the field of entrepreneurship made the event relevant and interesting to the media, albeit less due to the launch of the campaign itself but rather because of the Commissioner's presence.

The videos were received very well.

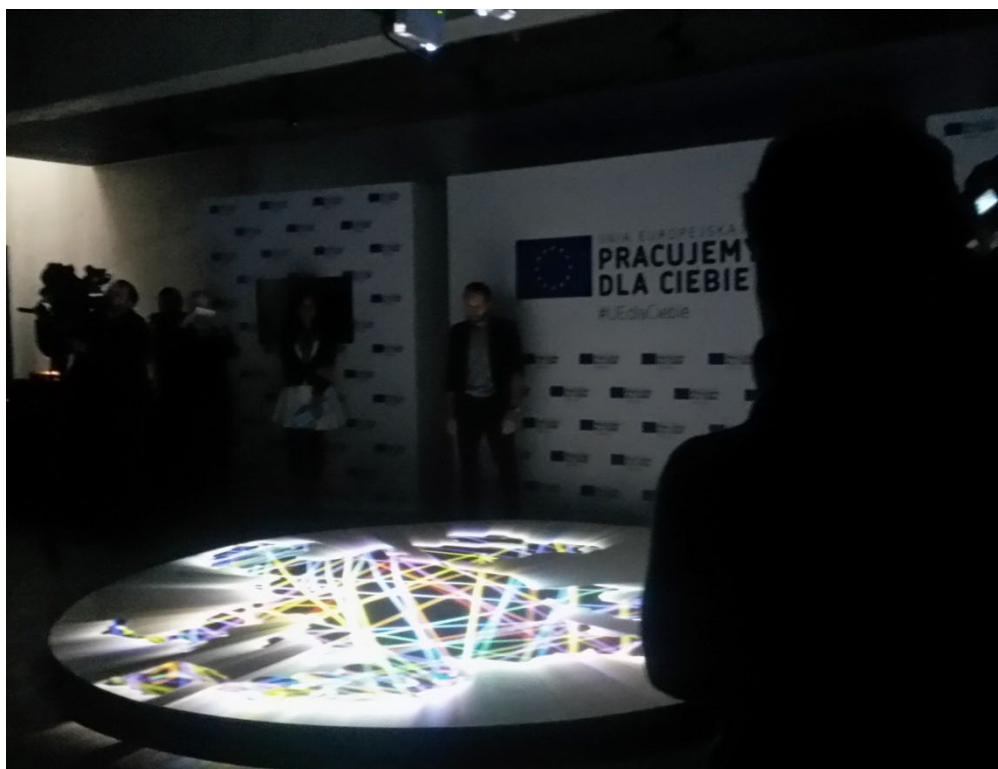
The organisers reported certain issues that arose during the organisation phase, mainly linked to the change in the campaign's topic late in the process.

#### **6. Photos**

**Photo 1: Press conference – Commissioner Bieńkowska and Mrs Synowiec (Head of REP) answering questions**



**Photo 2: Art performance**



**Photo 3: Campaign and EU logos**



## 1.5 Madrid, Spain

### 1. Introduction

Date	22 July 2014
Location	Madrid
Name of Coffey / Deloitte rep	N.A

The Spanish launch event was the first to be organised as part of the Corporate Communication Campaign.

The event was organised close to the Reina Sofia museum, around the topic of “Creating green jobs”. It comprised of two main activities:

- “Empleos verdes” street art work, by Jean-Baptiste Colin;
- A press conference.

The evaluation team was not present during the launch event.

### 2. Feedback from the launch event

*Number of journalists including questions posed:*

Fifteen media organisations attended the event:

- Euroactive;
- Portal europeo de la juventud;
- Ethic;
- EFE;

- Experimenta;
- Visual;
- El Publicista;
- Corresponsables;
- Euroexpress.Es;
- El Mundo;
- ABC;
- TVE (Europa 2014);
- Lawyerpress;
- Injuve;
- Noi in Spania.

As highlighted in HAVAS' Interim Report, the overall results for the Spanish press event were positive, with the event receiving the following media coverage:

- 29 web-based reports;
- 4 video segments;
- 1 press interview.

The messages conveyed in the press were positive with no critics having been voiced about the event.

The event also generated attention on social media with:

- 125 tweets being posted with the #Ueempleo hashtag, reaching 441,714 twitter accounts;
- Online articles being shared more than 160 times on social networks.

#### *Feedback received from EC Representation:*

The EC Representation in Spain reported that the event had been successful, despite having been organised before the summer break, and five months before the advertising campaign began in Spain, which hampered participation. The topic – Creating green jobs – was also deemed as very adequate, as "it is important that people in Spain understand the opportunities offered by entrepreneurship in the 'green economy'".

The EC Representation indicated that the organisation of the event had been quite resource-intensive, and that a considerable amount of work had been required in a very short period of time. They indicated that the collaboration with DG COMM had been "perfect", although it had been a bit more challenging with HAVAS. The EC Representation lamented that the organisation of the campaign had been steered in an excessively centralised way from HAVAS Paris. The Representation highlighted that HAVAS Paris could have benefited from additional local knowledge, as this had notably had an impact on the choice of the location for the event. The Representation reported that HAVAS had fully designed the campaign before contacting the national Representation, leaving little room for them to provide recommendations. Finally, the Representation indicated that they did not have a clear understanding on what were the responsibilities of the local company implementing the campaign.

#### *Feedback received from Beneficiaries:*

The Fundación Biodiversidad pointed out that the format of the event had been very relevant, but that the choice of the date (during the week, just before the summer break and five months before the launch of the communication campaign in the media) had had a major impact on participation. The beneficiary also regretted that the event had been too "institutional", very EC-centred, and that additional beneficiaries had not been invited.

#### *Feedback received from HAVAS:*

HAVAS reported that they thought the event had been a great success given that it was organised on July 22, making it therefore difficult to generate high attendance, and the fact that the team only had

10 days to implement the campaign.

### **3. Conclusions**

The Spanish launch proved to be quite successful, particularly given that it was the first event organised as part of the Corporate Communication Campaign, that it was organised within a very short time frame, before the summer holidays, and that it took place five months before the launch of communication campaign began in the media in Spain. The EC Representation did however lament that the organisation of the event had been steered too centrally from HAVAS' Paris office, whereas beneficiaries regretted that the event had been too EC centred.

## 1.6 Riga, Latvia

### 1. Introduction

Date	4 February 2015
Location	House of Europe, Riga
Name of Coffey / Deloitte reps	Mark Rogerson, Ilvars Veinbergs

The final launch event of the pilot series was held in Riga on 4 February, the launch-month having been chosen to coincide with the Latvian Presidency. The exact date had been chosen because (a) there was no major domestic political business that day and (b) an event on the Energy Union was to be held in Riga later that week so there was already a "European" feel to the news agenda.

The location was originally planned to be the Galerija Centrs, a popular shopping mall on the edge of Riga's Old Town. Under pressure from the Representation, this was changed a few days beforehand to the House of Europe, next door to the Representation office and not far from the mall itself, where the artwork was to be installed. Speakers at the event were:

- The Head of Representation, Inna Šteinbuka
- The Latvian Welfare Minister, Uldis Augulis
- A beneficiary, Leldi Bumbieri, a cook from Liepaja who trained in Germany under the Leonardo da Vinci programme
- The artist, Reinis Adovičs

By common consent, the event went very well on the day. It was efficiently and amiably hosted by the Press Officer, Kaspars Kreics. The three main speakers gave good presentations – Leldi Bumberi was more hesitant, but her obvious honesty and enthusiasm for the project was evident. There was a good video on the work of the artist. The room was pleasantly full, with several people standing at the back. The journalists were seated informally around tables and were clearly interested and engaged, taking notes and photographs throughout. No-one left early. Journalists questioned afterwards felt that they had been given a good, relevant story with a clear main message and that the press pack was useful.

Both the government minister and the beneficiary felt that the event had been successful from their particular perspectives.

#### *Number of journalists including questions posed:*

There were around a dozen journalists present. No questions were asked at the end, but this is apparently common in Latvia. Most journalists stayed behind afterwards to ask one-to-one questions to the speakers.

#### *Feedback received from EC Representation:*

The major issue was that the artwork was not actually ready on the day. Staff at the Representation had no doubt that this was due to a failure of management on the part of HAVAS in Riga and there was real anger behind the scenes. Had the event taken place in the shopping mall, it would have been a major embarrassment. However, since it was at the House of Europe, the line-to-take became that the art installation would be open the following day to coincide with the start of the advertising campaign. In the room, none of these tensions were evident and the absence of the artwork certainly allowed a greater focus on the main storyline. Thus was victory snatched from the jaws of defeat.

### 3. Observations on the art work

The following morning, the art installation was functioning. It was in a good, prominent location in the main walkway of the shopping mall. But early in the morning, it was something of a disappointment. There was just a white corridor to walk through with a moving light show on the ceiling, nothing else. One felt the same effect could have been achieved with a small slide projector.

At a later visit, the artist himself happened to be there. He explained that to activate it, visitors had to press

on the ceiling, this made the lighting change. ("You have to reach for education, it doesn't just come to you") If two people pressed, the patterns merged together ("Your journeys are merging and influencing one another"). The fact that one had to press on the ceiling was not intuitively obvious, and the presence of two security guards did not encourage touching the installation.

There were banners at each end of the installation explaining Erasmus+, but no obvious thematic link between them and the installation itself. The artist said he had been unaware that the banners would be put in place. The original concept had been that images of real people would be projected, telling their stories, but this never materialized.

#### **4. Observations from the on-the-spot survey**

The survey could not be carried out on the same day as the press conference, because the art-work was not ready. Instead, we have carried out the survey the next day (5<sup>th</sup> February) in the morning and a day after that (6<sup>th</sup> February) in the afternoon.

The survey revealed that people didn't have a clear understanding that the installation was supported or connected with the EU or European Commission. It should be noted that in the morning of 5 February, when this survey was conducted, all posters from main entrance into the installation were removed, and the only connection with the EU was representatives' t-shirts with the campaign logo.

The next day, 6 February, the situation changed and posters were hanging above the entrance into the installation. The fact that they were hanging high above eye level may have been the reason why most of the surveyed members of the public still did not know which organisation was behind the artwork.

#### **5. Conclusions**

Two facts stand out: there was a greater involvement of the Representation in decisions of timing, location and content than at some other events; and the Riga event went well even without the art installation.

The HoR and her staff clearly felt constrained by the four-way decision making process, but they pushed hard and it worked.

At most of the earlier Representation events, the feeling had been that the artwork was interesting (perhaps), but not obviously relevant. The fact that an event could go so well without the art at all seems to support this view.

It is also worth noting that in some countries at least the presence of a local politician can be used as a "draw" where no Commissioner is available. This may be more the case in beneficiary countries where local politicians feel they have more to gain by siding with "Brussels".

## **6. Photos**

**Photo 1: The press conference - Latvian Minister of Welfare, Uldis Augulis**



**Photo 2: The art installation in the shopping centre**

The "representative" talking to a passer-by is visible in the white shirt on the left. Campaign logo is visible high above eye level.





**Photo 3: The art installation – interaction with a member of the public upon touching**





## 2. Annex 1B: Eurobarometer results

As a part of internal campaign monitoring, DG COMM launched four waves of Eurobarometer surveys:

- **Wave 1**, used as an initial **baseline** only (i.e. not measuring the effects of the pilot), took place prior to the campaign's implementation and consisted of three surveys:
  - Flash Eurobarometer 2004 which was rolled out in Spain only, with field work carried out from 22<sup>nd</sup> to 24<sup>th</sup> September 2014, in the light of the Pilot launch in Spain having taken place on 22<sup>nd</sup> July 2014 and the advertising starting in November;
  - Flash Eurobarometer 2006, undertaken between 3<sup>rd</sup> and 5<sup>th</sup> November 2014 in Germany, Finland, Poland and Portugal, prior to the launch of the campaign;
  - Flash Eurobarometer 2011, carried out in Latvia between 15<sup>th</sup> and 17<sup>th</sup> January 2015, prior to the launch of the campaign in this country;

As this wave of Eurobarometer surveys took place prior to the campaign's implementation, its results are not presented in the detailed overview below apart from the last question which dealt with respondents' agreement with country-specific statements (Q7a-e).

- **Wave 2:** Flash Eurobarometer 2009, covering Germany, Spain, Finland, Poland and Portugal, carried out between 15<sup>th</sup> and 17<sup>th</sup> December 2014;
- **Wave 3:**
  - Flash Eurobarometer 2012, covering Germany, Spain, Finland, Poland and Portugal, whose fieldwork was carried out between 3<sup>rd</sup> and 5<sup>th</sup> February 2015, corresponding to the 2<sup>nd</sup> wave of advertising in those countries.
  - Flash Eurobarometer 2015 in Latvia, carried out between 3<sup>rd</sup> and 5<sup>th</sup> March 2015;
- **Wave 4**, the post-advertising surveys:
  - Flash Eurobarometer 2014, covering Germany, Spain, Finland, Poland and Portugal, carried out between 3<sup>rd</sup> and 5<sup>th</sup> March 2015;
  - Flash Eurobarometer 2017 in Latvia, carried out between 24<sup>th</sup> and 26<sup>th</sup> March 2015, after the 2<sup>nd</sup> wave of advertising has finished.

All of the surveys were conducted by telephone (landline and mobile) and comprised interviews with a representative sample of 1000 members of the public aged 15 and over in each of the five countries.

The questions asked are listed below, and the subsequent table shows which questions were asked in which wave.

- Q1.** Do you agree or disagree with the following statement: the EU is working for you?
- Q2.** Have you seen, read or heard about the campaign "European Union: working for you"?
- Q3.** Have you seen: One of them, Two of them, The three of them, None of them. Polish respondents were additionally asked "All four of them".<sup>4</sup>

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<sup>4</sup> Respondents were read descriptions of three advertisement campaigns that ran in their country.

**Q4a.** Did you see, read or hear about the campaign “European Union: working for you” through any of the following means: TV, Radio, Written press, online social media, word of mouth, websites, other?

This question was only asked to respondents who indicated that they had seen the campaign.

**Q4b.** Would you be interested in seeing, reading or hearing about the campaign “European Union: working for you” in the media?

This question was only asked to respondents who indicated that they did not see the campaign.

**Q5a.** Do you agree or disagree with the following statement: the campaign “European Union: working for you” gives you a better understanding of what the EU is doing for its citizens?

This question was only asked to respondents who indicated that they had seen the campaign.

**Q5b.** Do you agree or disagree with the following statement: you wish you would see more information in the media about what the EU is doing for its citizens.

This question was only asked to respondents who indicated that they did not see the campaign.

**Q6.** In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

**Q7a.** Do you agree or disagree with the following statement: the EU funds projects that help to create jobs in Spain?

**Q7b.** Do you agree or disagree with the following statement: the EU funds projects to drive innovation in Portugal?

**Q7c.** Do you agree or disagree with the following statement: EU helps to protect German consumers when shopping online?

**Q7d.** Do you agree or disagree with the following statement: the EU helps Polish farmers to have a better future?

**Q7e.** Do you agree or disagree with the following statement: the EU funds projects that help older people in Finland to have a better life?

**Q7f.** Do you agree or disagree with the following statement: the EU helps Latvian citizens get jobs in Latvia?

	Wave 1	Wave 2	Wave 3	Wave 4
ES	DE, FI, LV, PL, PT,	DE, ES, FI, PL, PT	DE, ES, FI, LV, PL, PT,	DE, ES, FI, LV, PL, PT
Q1	Q1	Q1,	Q1,	Q1,
Q4a	Q2	Q2	Q2,	Q2,
Q5a	Q4a	Q3,	Q3,	Q3,
Q5b	Q4b	Q4a,	Q4a,	Q4a,
Q7a	Q5a	Q4b,	Q4b,	Q4b,
	Q5b	Q5a	Q5a,	Q6
	Q7 b, c ,d ,e, f	Q5b	Q5b,	Q7 b, c ,d ,e, f
			Q6	

## 2.1 Summary of key trends

We observe the following trends from the results of the four waves of the Eurobarometer surveys. However, as this data was not designed and implemented by the evaluation team it maybe that there are other factors that should be taken into account in its analysis. These are:

- People in **Finland and Poland were most in agreement** with statement the **'EU is working for you'** during the campaign period. Levels of agreement with the statement remained relatively consistent in Spain, Latvia and Portugal before and immediately after the campaign. In Germany, there was an increase in levels of agreement with this statement before and during the campaign (wave 1: 53% – wave 3: 61%), which declined to 56% after the end of the campaign. In Finland, there was an increase in agreement from waves 2 to waves 3 and 4 up from 63% to 71%. In Poland agreement decreased after the second wave from 70% to 62%.
  - Most people who feel positive about the EU agreed with this statement across the 6 countries;
  - **Most people with a neutral opinion of the EU did not have strong feelings about the statement**, except in Poland where 76% agreed. Those in Portugal and Spain were least in agreement. The other countries were either slightly above or below 50%.
  - In all countries, except Latvia **levels of agreement tend to decrease with age**.
- With regards to the country-specific statements, there was **an increase in the level of agreement with the country specific statements before and after the campaign in all 6 countries**. The most notable increases can be observed for Finland (+18%) and Spain (+7%).
  - A majority of people with a pre-existing positive view of the EU were positive in all countries except Latvia. The results suggest that the statement 'The EU helps Latvian citizens get jobs in Latvia' was not agreed with by the majority. **Among people with a neutral view of the EU, the Polish (56%) and Portuguese (69%) were most positive**. Neutrals in other countries had more mixed views.
  - As with the campaign slogan, **young people (15-24) were particularly positive** towards the country-specific statements (Portugal (87%), Poland (77%), and Germany (71%)).
- **In terms of recall: at least circa 28 million citizens saw, heard or read about the campaign**<sup>5</sup>. In three countries Finland, Poland and Latvia the number of citizens who saw the campaign was between a third of citizens and **43% (in Latvia)**.
  - In all of the countries, except Latvia, the proportion of neutrals who say that they had seen, read or heard about the campaign was lower than the proportion of respondents with positive and negative stance.
- In terms of recall: the results are consistent with the results on reach; **more citizens in Finland, Poland and Latvia remembered at least one advert than in the other three countries**.
  - In all countries except Spain, people with a positive view were the most likely to recall at least one advert. The response levels from respondents with neutral and negative opinion were lower and similar.

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<sup>5</sup> People who have seen, heard or read at least 1 ad.

- The **television adverts reached more people than the other mediums**. The TV adverts were seen by more citizens than the print and digital ads. Print adverts generated best levels of penetration in Germany and Finland in comparison to other countries;
- The level of **desire for more information in the media about what the EU is doing for its citizens remains high** (over 75% in all countries).
- The proportion of respondents with a **neutral stance on the EU has increased** in all target Member States. The results suggest that this has been at the cost of a **decrease in the number of persons with a negative stance** towards the EU.

Our understanding is that the Flash Eurobarometer surveys were conducted over the telephone drawing on samples of 1,000 citizens per country over the age of 15. The samples were structured to ensure that they were statistically representative of the wider population within each country, with a view to allowing the results to be extrapolated to the wider population. There is, however, a margin of error within the Eurobarometer survey approach of typically +/- 4%, depending on the response size.

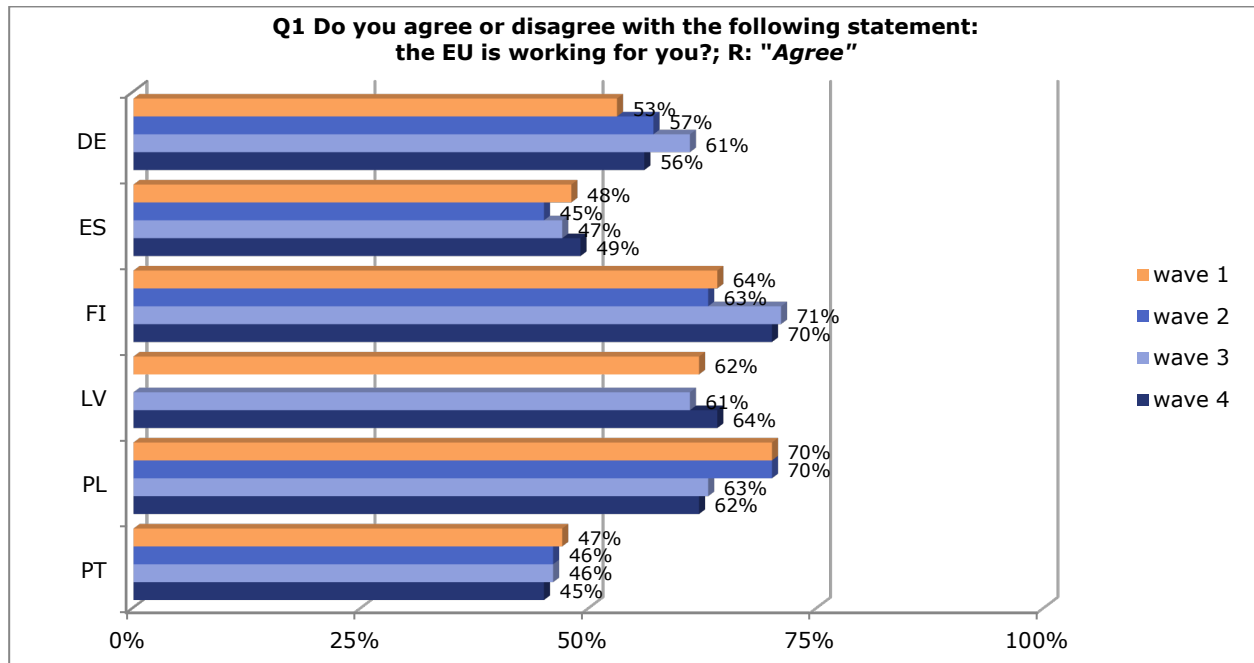
The below interpretation of the results was drawn from raw data provided by the European Commission. Our goal in interpreting this data is to identify trends and clearly discernable differences in the data over the four waves. This means that small percentage differences between the different survey waves are not being considered as significant in the subsequently presented detailed analysis.

Whilst Wave 1 of the survey was conducted prior to the campaign launch, we include this data, where relevant in our analysis as it provides a pre-campaign baseline.

## 2.2 Detailed Eurobarometer results

### 2.2.1 Agreement with the overarching and specific messages

Figure 1: Levels of agreement with the campaign slogan per MS



Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

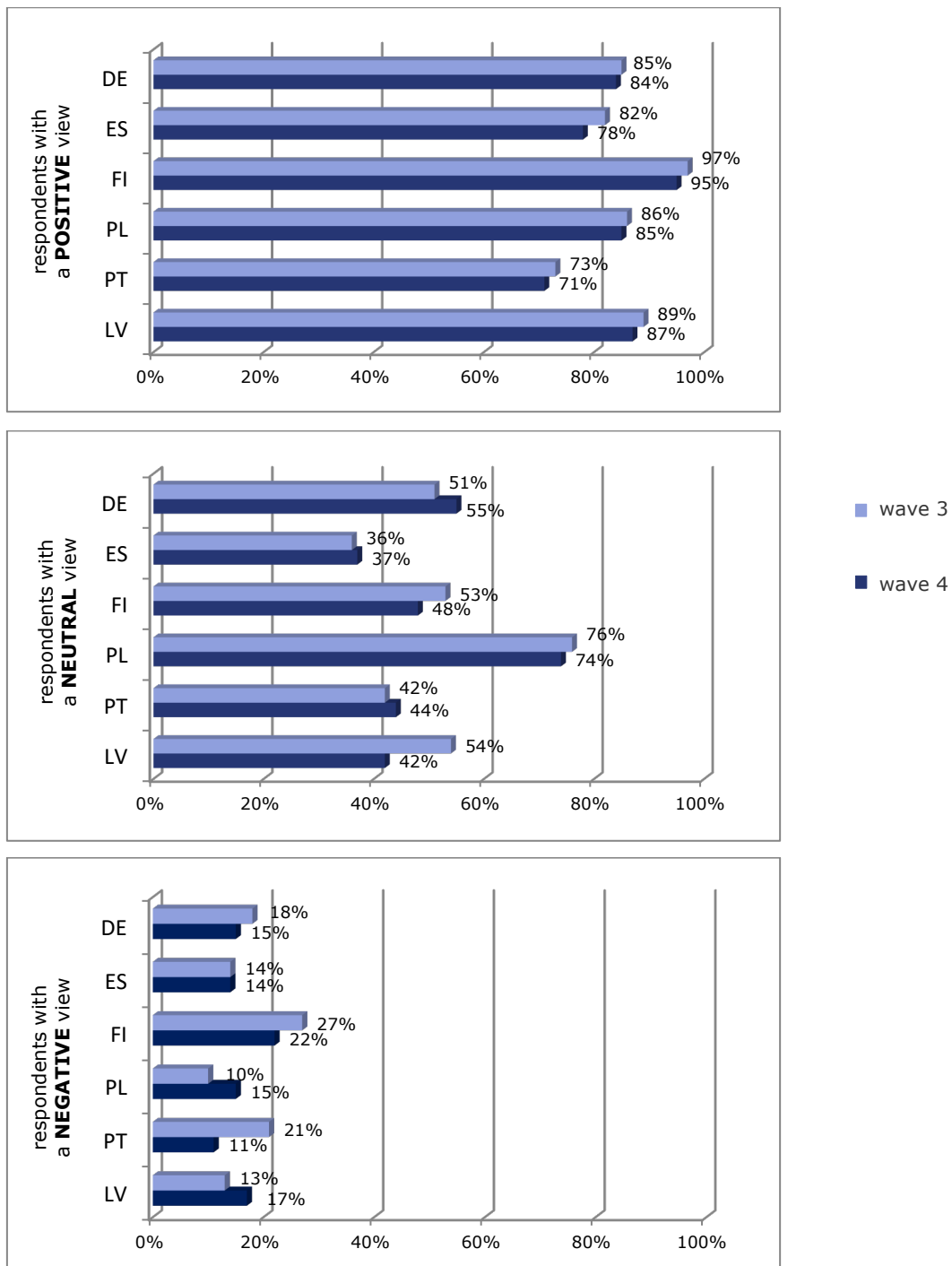
The first question, which asked people whether or not they agreed with the statement '**the EU is working for you**' did not make a direct link to the campaign although it was in fact the main campaign slogan. This means that it is not possible to infer that changes in agreement resulted directly from the campaign, but this question serves to provide information on attitudes to the proposal that the EU is working for you and changes to these attitudes during the campaign period.

According to the Eurobarometer data, the overall acceptance of the statement 'The EU is working for you' has remained relatively consistent in Spain, Latvia and Portugal. An increase in levels of agreement can be observed between the pre-campaign baseline in Germany and Finland and levels of agreement expressed in the third Eurobarometer wave, which was run at the end of the TV advertising campaign. Meanwhile, there is a decrease in levels of agreement with the statement the EU from the high of 70% at pre-campaign baseline and wave 2 of the survey to 63 and 62% in response to the third and fourth survey waves in Poland.

The results from the four waves of Flash Eurobarometer surveys disaggregated by the view of the EU of the respondents, their self-reported living place and age are presented on the next pages.

**Figure 2: Levels of agreement with the campaign slogan, per view of the EU<sup>6</sup>**

**Q1 Do you agree or disagree with the following statement: the EU is working for you?;  
R: "Agree"**



Source: Flash Eurobarometer surveys: 2012, 2014, 2015, 2017.

The results of the Flash Eurobarometer suggest that the level of agreement with the statement was particularly high among respondents with a positive view of the EU, ranging from 71% in Portugal in wave 4, to as much as 97% in Finland in wave 3.

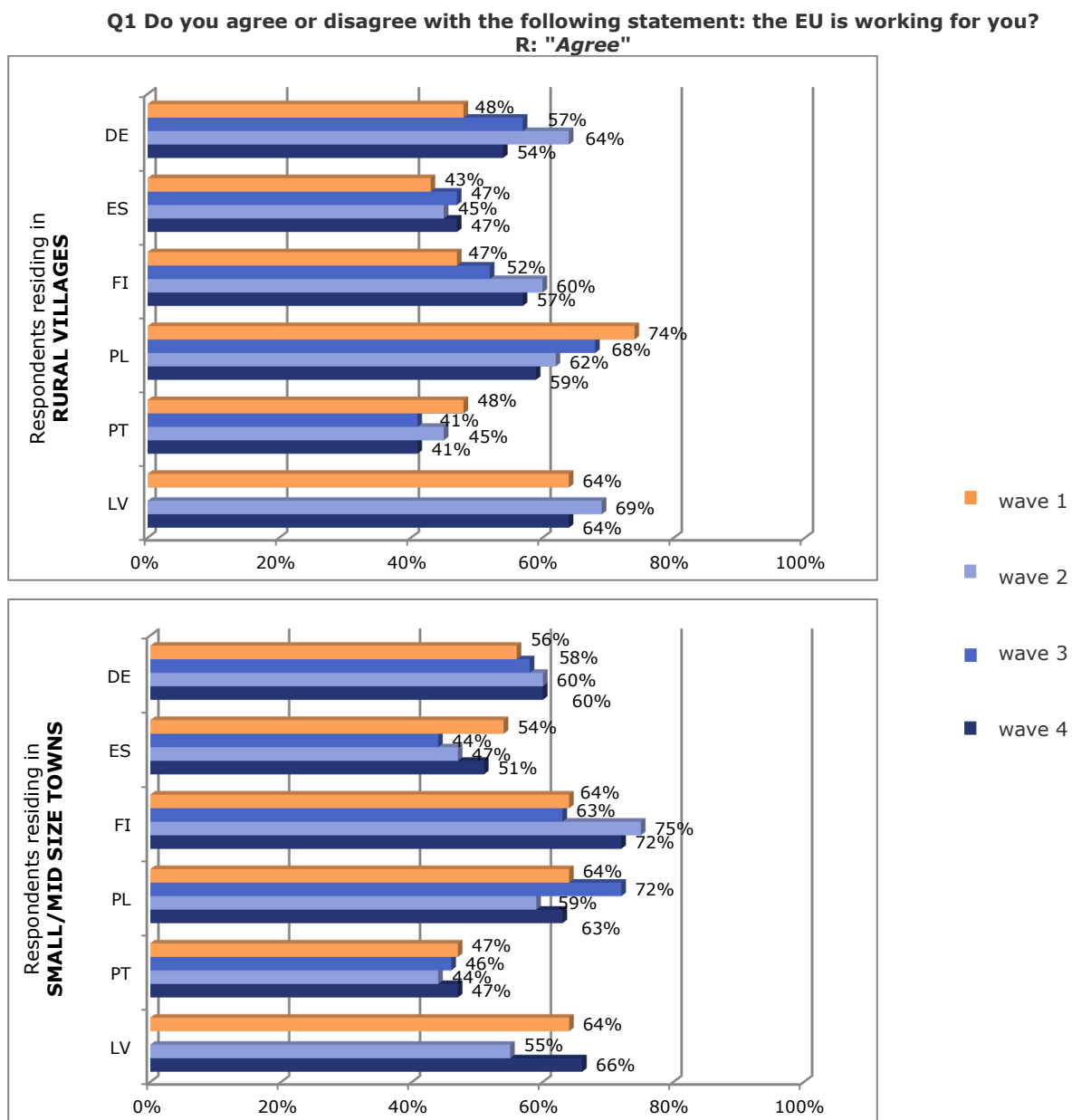
<sup>6</sup> Data from the Flash EB surveys for wave 1 and wave 2 did not disaggregate Q2 by respondents' view of the EU.



Although levels of agreement among neutrals were not as high as those indicated by positives, respondents with a neutral view had much higher levels of agreement than those with a negative view. An example of this trend is given by Poland where 10% and 15% of negative respondents agreed with the statement in waves 3 and 4, which compares with 76% and 74% of respondents with a neutral view on the EU. Amongst respondents with a neutral view, the decrease in levels of agreement by respondents in Latvia between the third and fourth wave stands out (54% to 42%) as does a smaller decrease in agreement between the two waves in Finland.

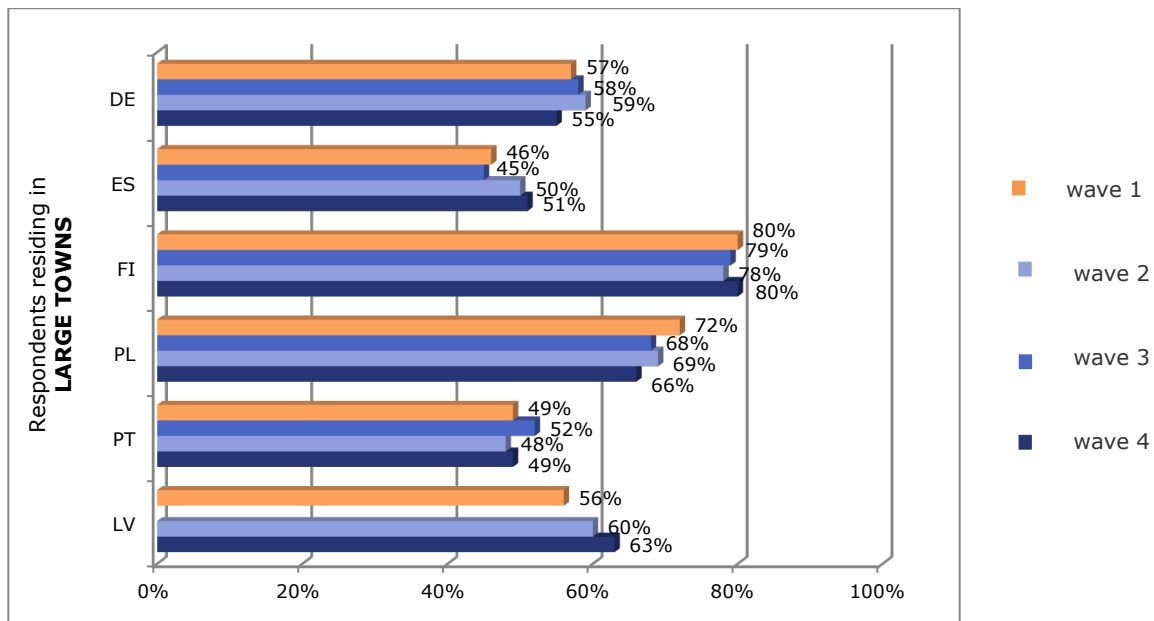
Respondents with a negative view of the EU in all countries were least likely to agree with the campaign's overarching message, with the levels of agreement ranging from 11% in Portugal to 27% for Finland. The reduction in the level of agreement from wave 3 (21%) to wave 4 (11%) in Portugal stands out.

**Figure 3: Levels of agreement with the campaign slogan, by location**



**Figure 4: Levels of agreement with the campaign slogan, by location - continued**

**Q1 Do you agree or disagree with the following statement: the EU is working for you?  
R: "Agree"**

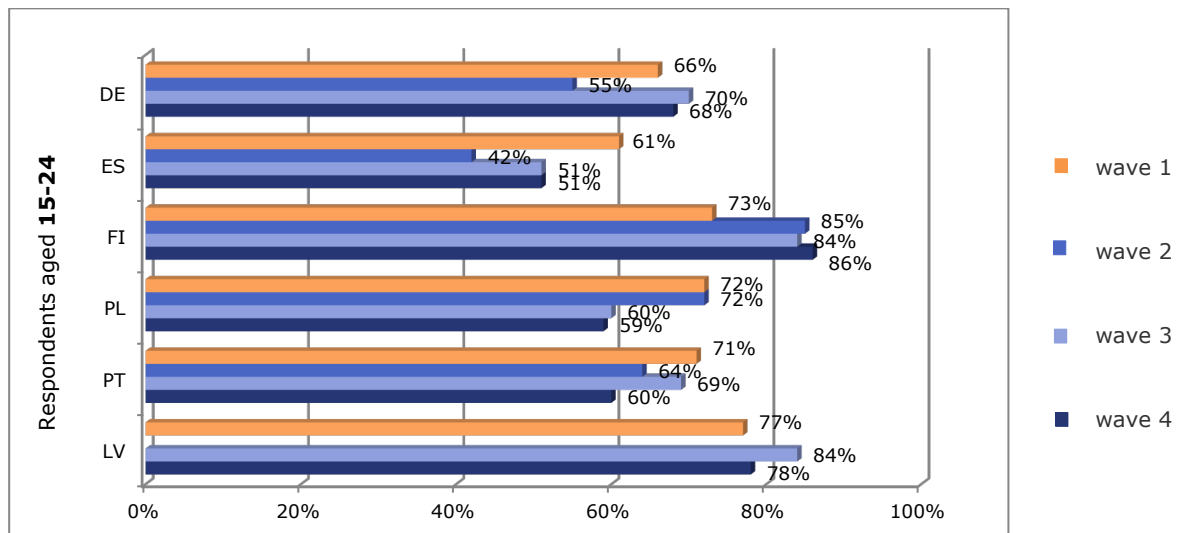


Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

The results of the Eurobarometer seem to suggest that there were no significant differences between the levels of agreement with the campaign's main message, which would be dependant on the respondents' urbanisation level in all counties but Finland. There, respondents living in large towns were up to 8% more likely to agree with the message.

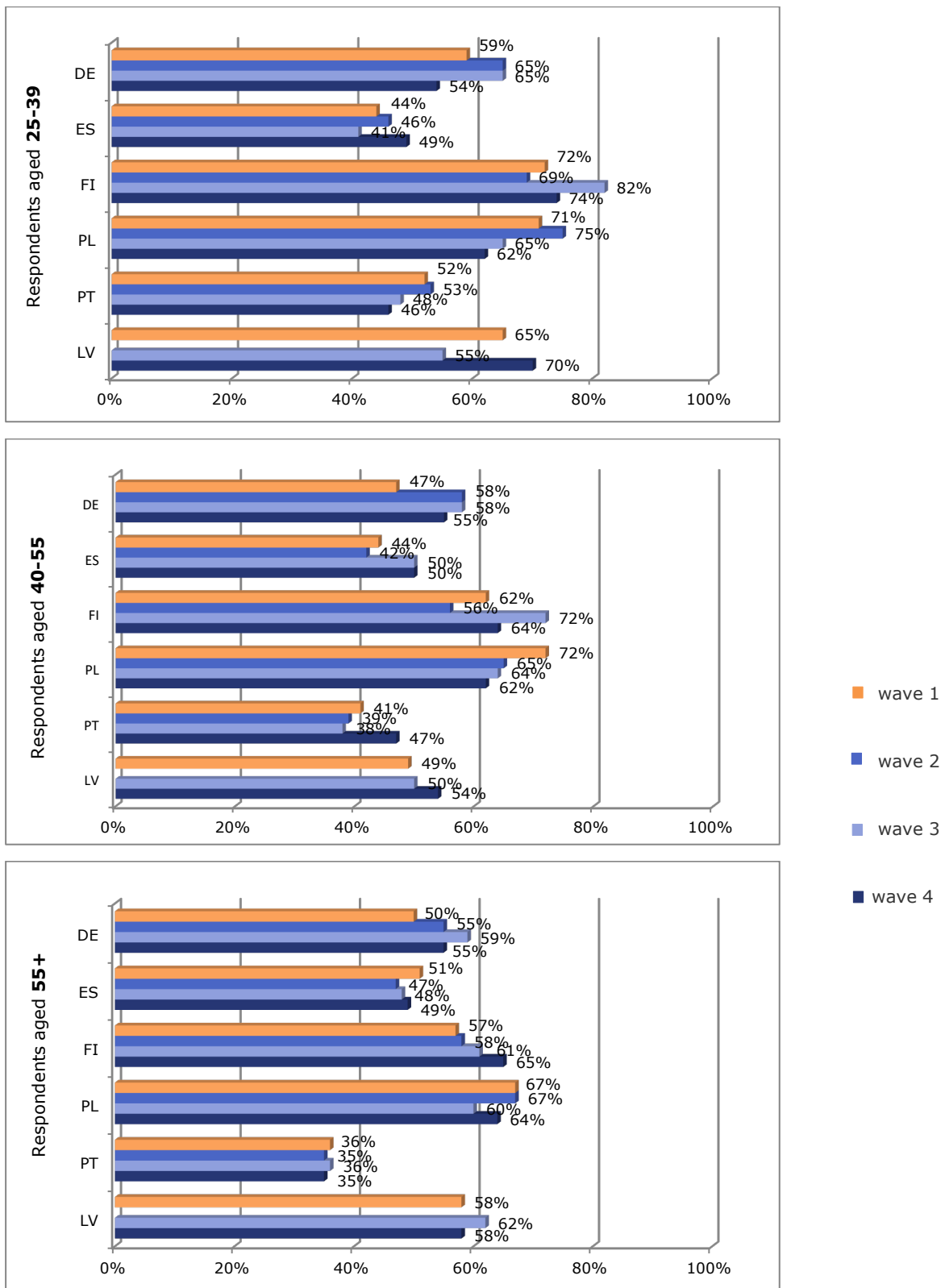
**Figure 5: Levels of agreement with the campaign slogan, per age group**

**Q1 Do you agree or disagree with the following statement: the EU is working for you?  
R: "Agree"**



**Figure 6: Levels of agreement with the campaign slogan, per age group - continued**

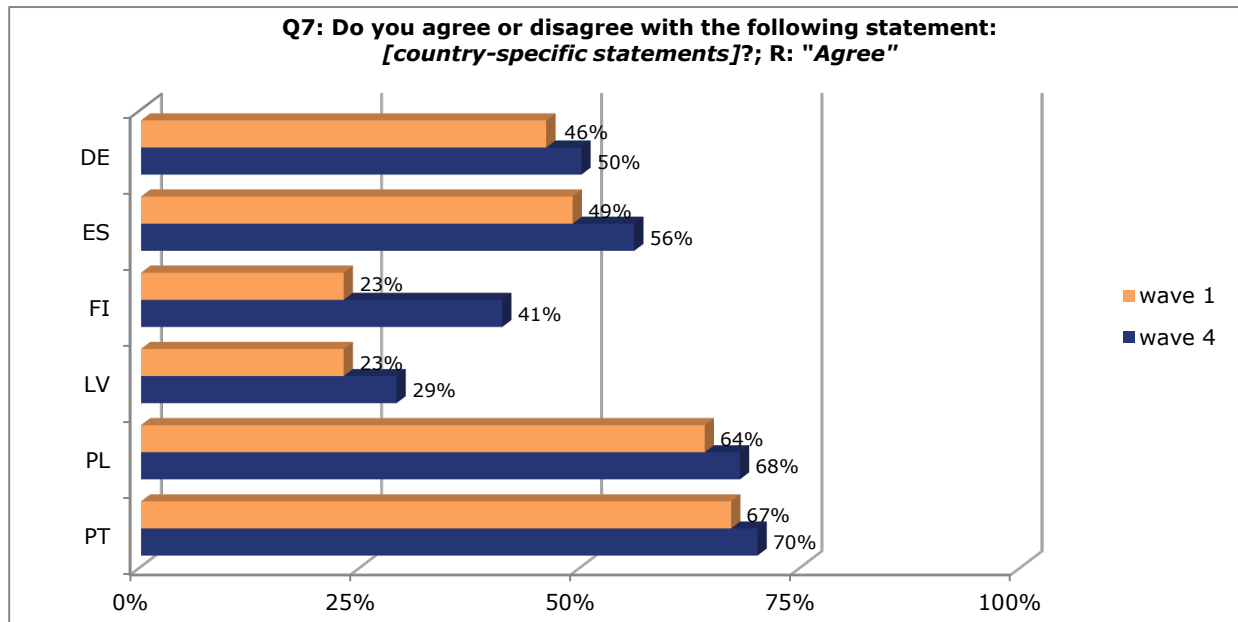
**Q1 Do you agree or disagree with the following statement: the EU is working for you?  
R: "Agree"**



Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

The results disaggregated by age of respondents suggest that in all of the countries, apart from Latvia, the level of agreement with the campaign's main message seems to decrease with age of the respondents.

**Figure 7: Agreement with country-specific statements**



Source: Flash Eurobarometer surveys: 2004, 2006, 2011, 2014, 2015

This question was asked once before the campaign launch (Eurobarometer wave 1) and again after the two waves of advertising (Wave 4).

The above graph shows the results when respondents were asked if they agreed or not with a series of statements, which were aligned with the themes in one of the three adverts shown in each country, see below:

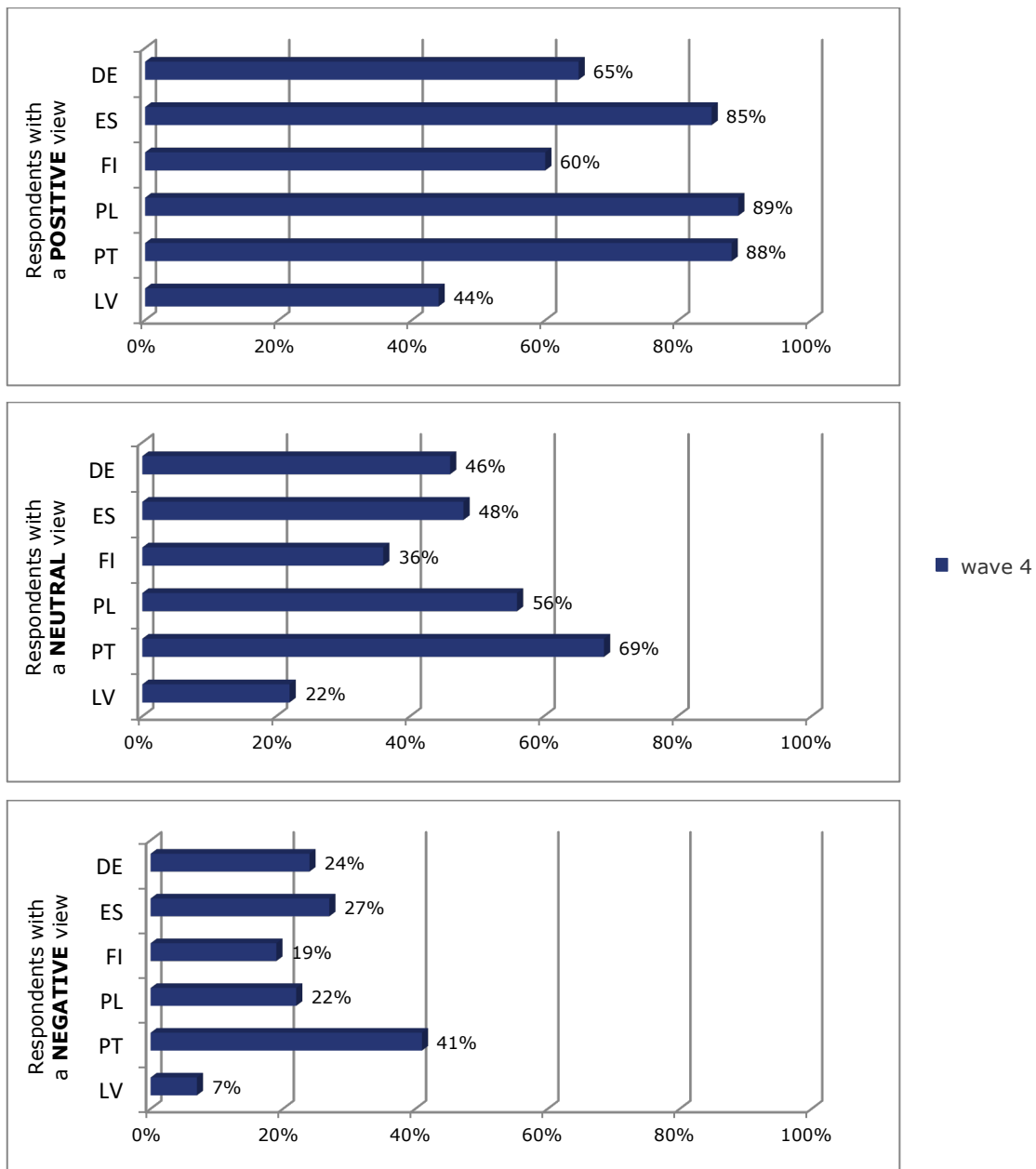
- EU funds projects that help to create jobs in Spain;
- EU funds projects to drive innovation in Portugal;
- EU helps to protect German consumers when shopping online;
- EU helps Polish farmers to have a better future;
- EU funds projects that help older people in Finland to have a better life;
- EU helps Latvian citizens get jobs in Latvia.

The comparison of findings indicates an increase in the level of agreement with country specific statements in all countries. The most notable increases can be observed for Finland (+18%) and Spain (+7%).

The detailed results on agreement with country-specific statements disaggregated by the view of the EU of the respondents and their age are presented on the next pages.

**Figure 8: Agreement with country-specific statements, per view of the EU <sup>7</sup>**

**Q7 Do you agree or disagree with the following statement: [country specific statement]?  
R: "Agree"**



Source: Flash Eurobarometer surveys: 2004, 2006, 2011, 2014, 2015

Eurobarometer results show that people with a positive view of the EU agree the most with country-specific statements and that people with a neutral view were in much greater agreement than those who felt negative towards the EU.

Levels of agreement varied significantly between countries. It is important to take note that as different statements were put forward in each country it is not possible to compare between countries. Amongst respondents with a positive view, levels of agreement reached 89% in Poland, 88% in Portugal, 85% in Spain and 65% in Germany and 60% in Finland.

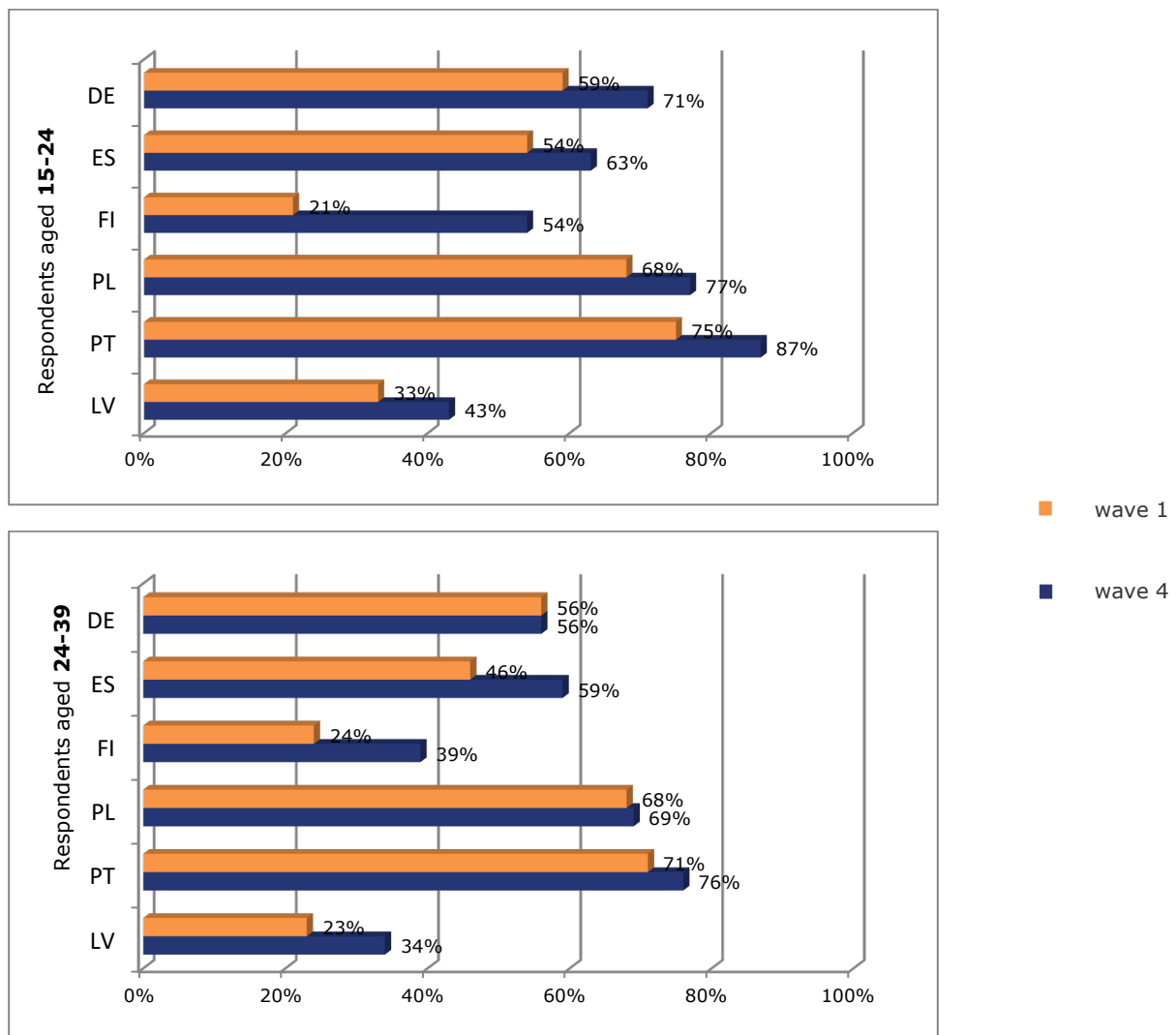
<sup>7</sup> The data on this question's results were disaggregated by respondents' view of the EU in wave 4 only.

The responses from Latvia across all viewpoints (positive, neutral and negative), stand out as being significantly lower than the other countries (44%, 22% and 7%). This result stands out when compared to response rates to levels of agreement with the general campaign slogan (the EU working for you). Our own assessment is that the types of claim made by country are also likely to have an impact. For example the claim regarding German consumers relates to specific legislation, whereas we argue that the claim in Latvia is broader given that the EU has a less direct role in helping citizens get jobs in Latvia.

Levels of agreement with the statements among respondents with a neutral view of the EU varied as well: from 69% in Portugal, 56% in Poland, 48% in Spain, 46% in Germany, 36% in Finland, to 22% in Latvia. The levels of agreement were the lowest among the persons with a negative view of the EU: 41% in Portugal, 27% in Spain, 24% in Germany, 22% in Poland, 19% in Finland and 7% in Latvia.

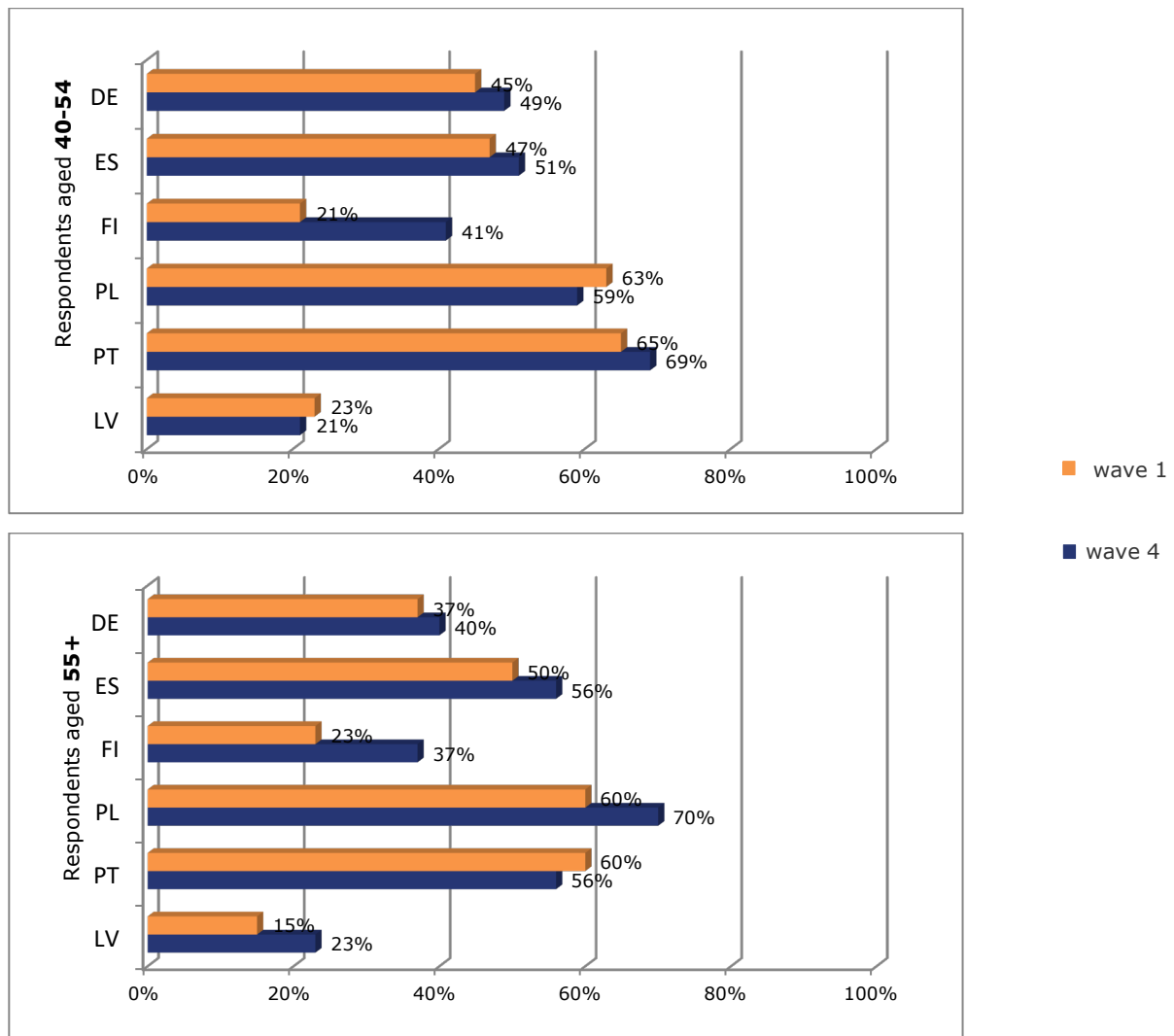
**Figure 9: Agreement with country-specific statements, per age**

**Q7 Do you agree or disagree with the following statement: [country specific statement]?  
R: "Agree"**



**Figure 10: Agreement with country-specific statements, per age - continued**

**Q7 Do you agree or disagree with the following statement: [country specific statement]?  
R: "Agree"**



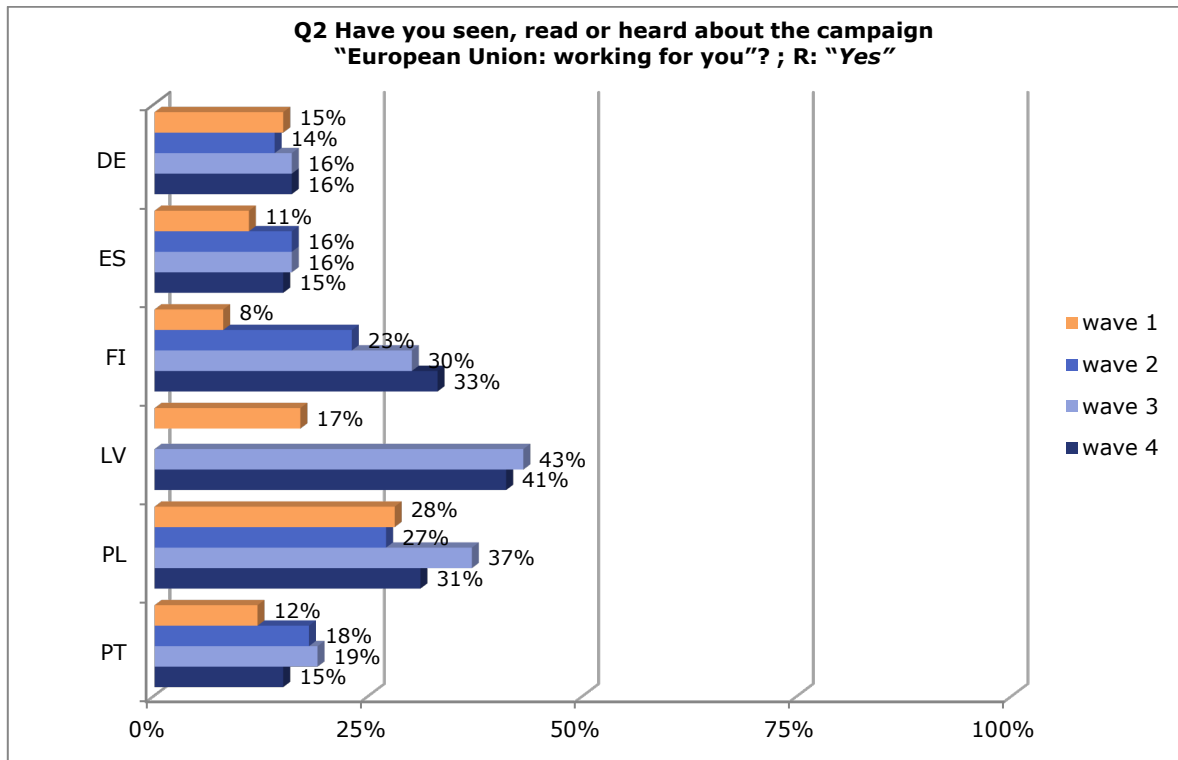
Source: Flash Eurobarometer surveys: 2004, 2006, 2011, 2014, 2015

According to the Eurobarometer data, in all of the countries it was the people from the youngest age group (15-24)<sup>8</sup> who agreed with the statements the most. This trend is similar to the responses to the campaign slogan (the EU working for you), where again younger age groups tended to be more in agreement. Particularly high levels of support were noted for the youngest groups in Wave 4 in Portugal (87%), Poland (77%), and Germany (71%). In addition, in comparison to the pre-campaign baseline the results represent a significant increase in levels of agreement across all ages in Poland.

<sup>8</sup> In Poland high levels of agreement can be seen across all the age groups.

## 2.2.2 Recall of the campaign

Figure 11: General recall of the campaign per country



Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

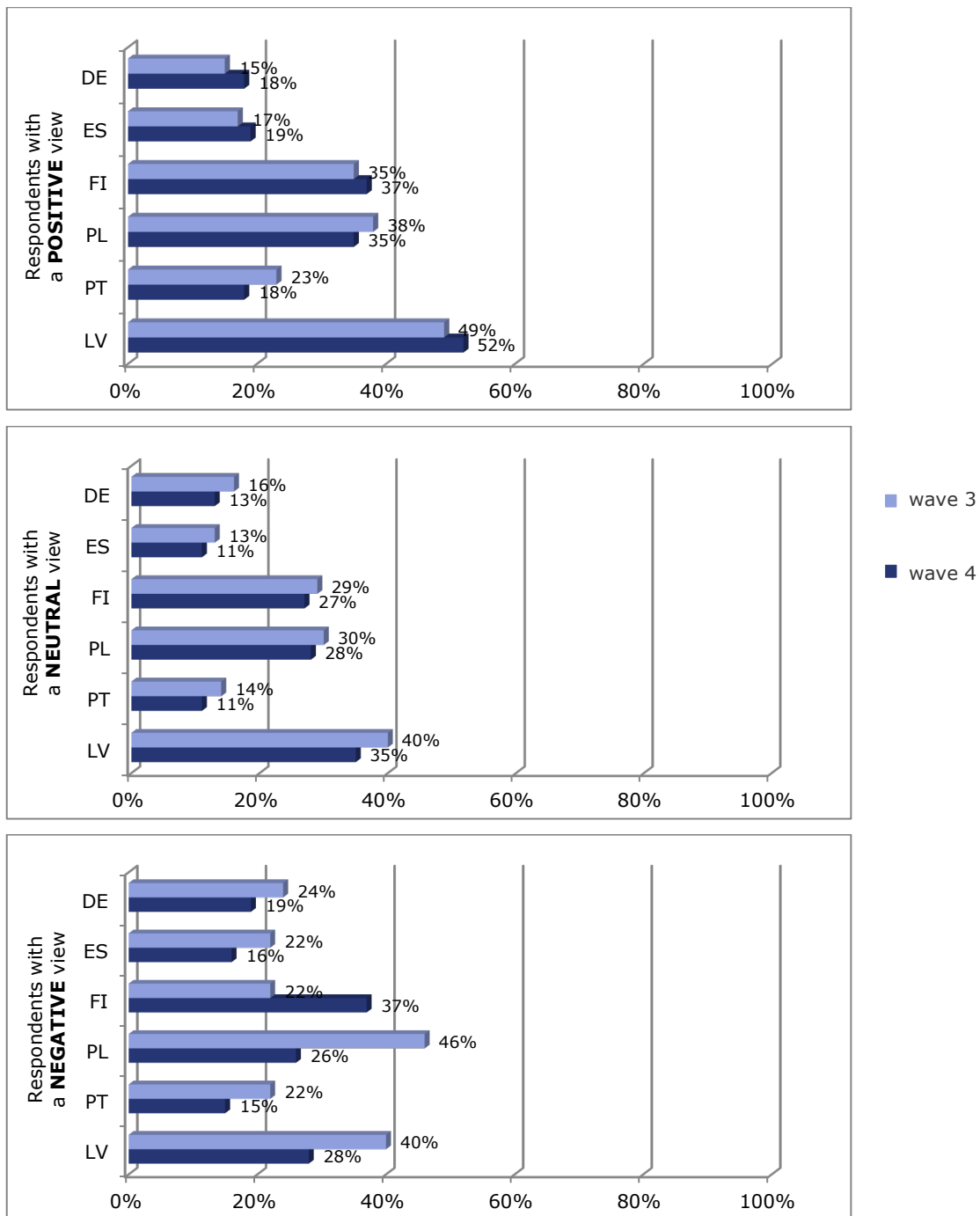
The results suggest that there have been varying levels of recall of the campaign in the target countries. There are three countries: Finland, Latvia and Poland, where the significantly higher percentages report that they have seen the campaign, (43% in wave 3 in Latvia). Broadly reach either stayed the same or increased from wave 2 to wave 3 of the survey, which corresponded to the two advertising waves. It is interesting to note that in Poland 28% of respondents in wave 1 reported to have seen a campaign before it had even started.

The graphs on the following pages explore the recall of the campaign in more detail, depicting the levels of campaign's reach disaggregated by the respondents' views of the EU, self-reported living place and age.



**Figure 12: Recall of the campaign in the countries, per view of the EU<sup>9</sup>**

**Q2 Have you seen, read or heard about the campaign "European Union: working for you"?**  
**R: "Yes"**



Source: Flash Eurobarometer surveys: 2012, 2014, 2015, 2017.

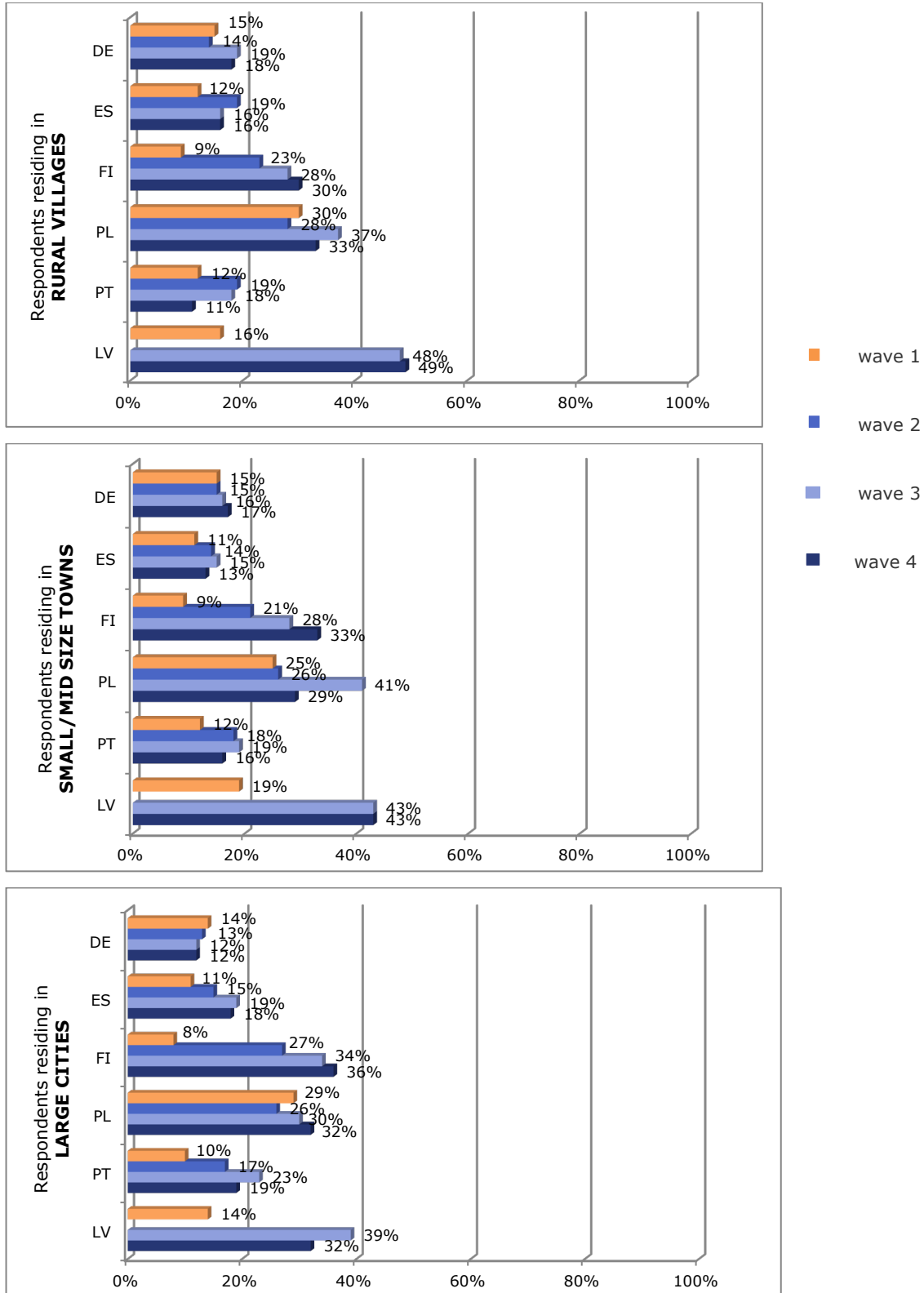
In all of the countries with the exception of Poland, more of the respondents with a positive view of the EU reported seeing / reading/ hearing about the campaign than those with a negative view of the EU. In all of the countries, with the exception of Latvia the volumes of respondents with neutral stance towards the EU who have reported to have seen (or read or

<sup>9</sup> Data from the Flash EB surveys for wave 1 and wave 2 did not disaggregate Q2 by respondents' view of the EU.

heard) the campaign were lower than the volumes of respondents with positive and negative stance who have reported seeing the campaign.

**Figure 13: Recall of the campaign in the countries, per urbanisation**

**Q2 Have you seen, read or heard about the campaign "European Union: working for you"?**  
**R: "Yes"**

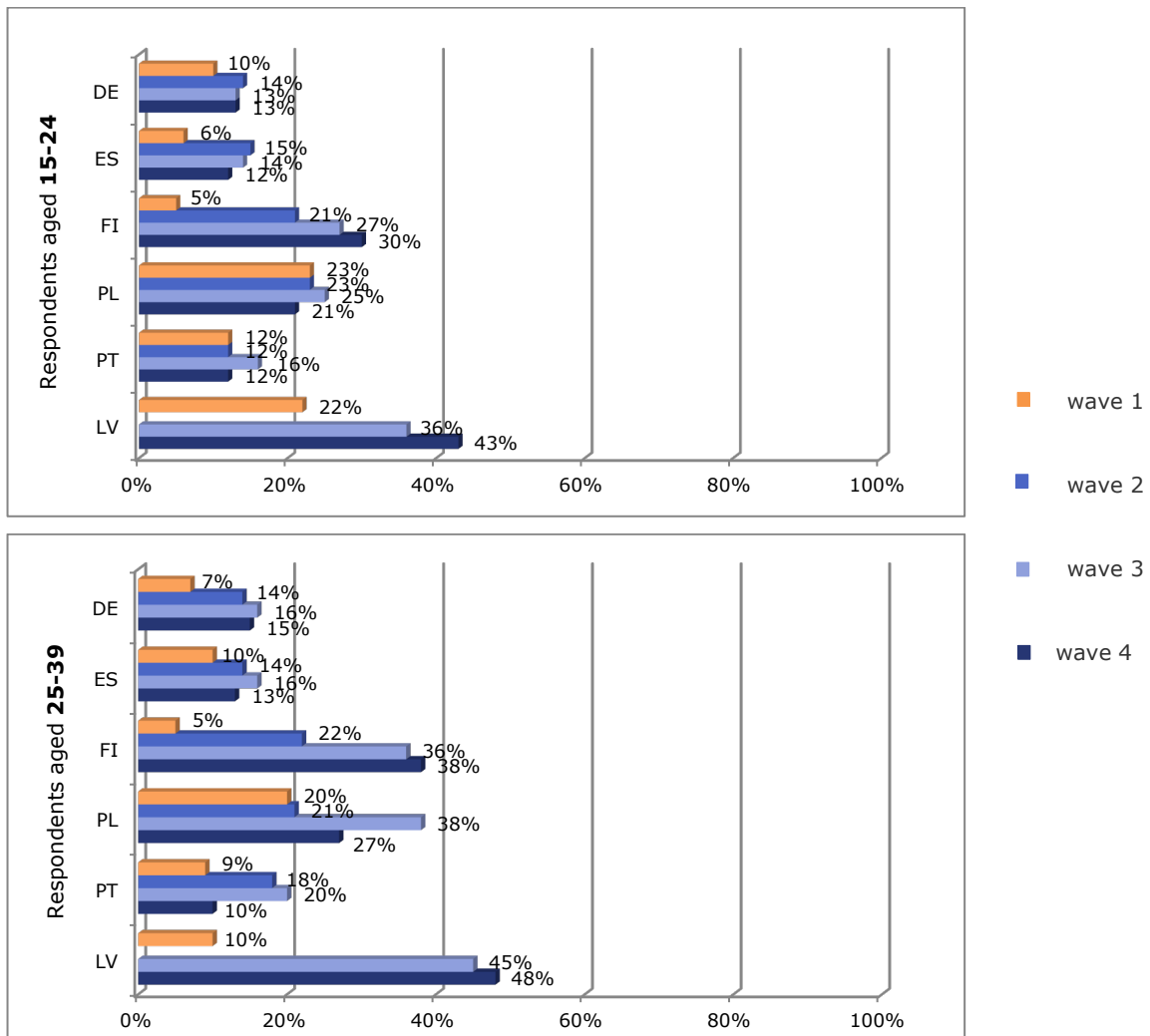


Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

The results disaggregated by self-reported living place show that there have not been significant differences in the reach of the campaign between different urbanisation levels within the same country. However, when compared across all of the six pilot countries it can be seen that the highest levels of recall were reported in Latvian rural areas (49% reported in Wave 4), and the lowest in German large cities (12% in Waves 3 and 4).

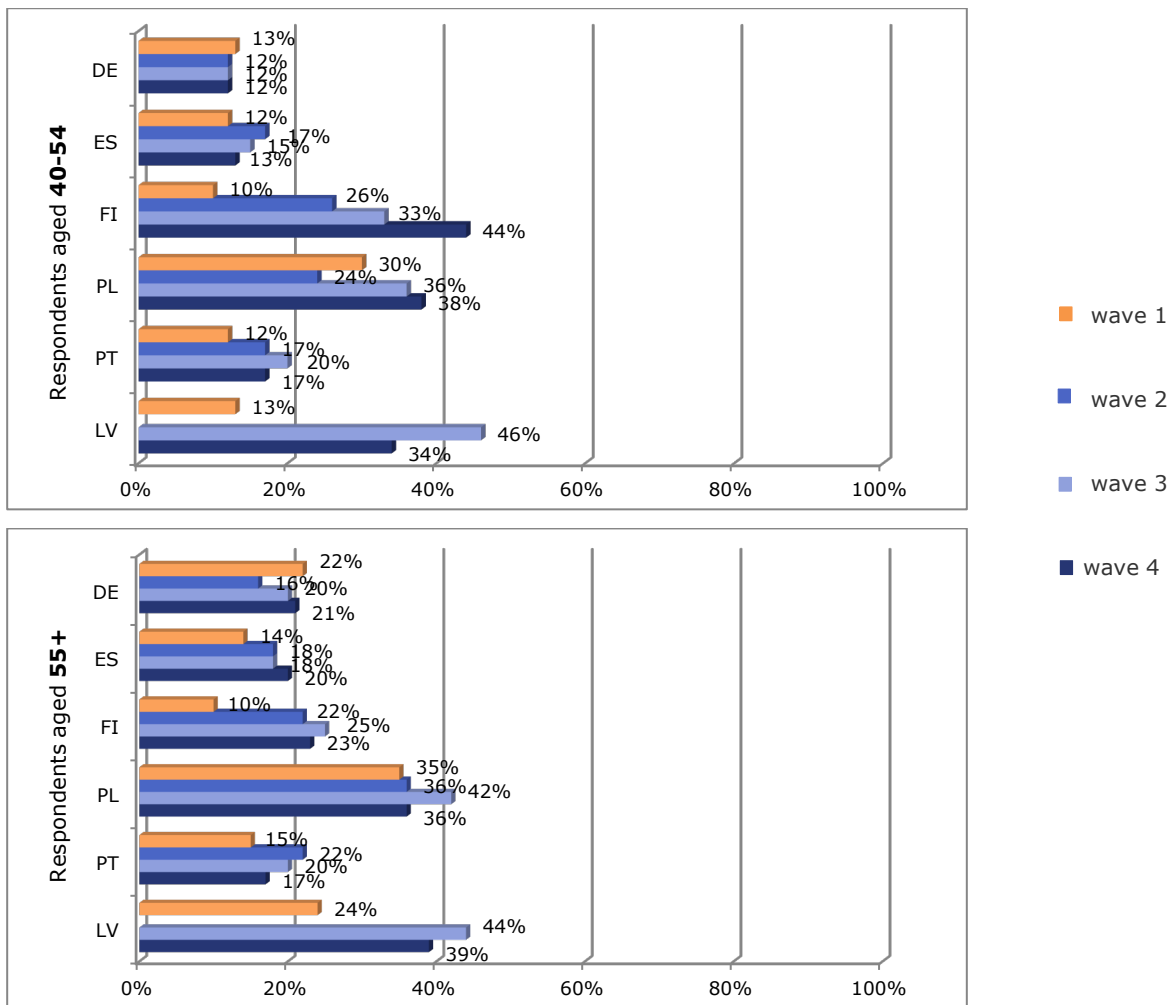
**Figure 14: Recall of the campaign in the countries, per age**

**Q2 Have you seen, read or heard about the campaign "European Union: working for you"?**  
**R: "Yes"**



**Figure 15: Recall of the campaign in the countries, per age - continued**

**Q2 Have you seen, read or heard about the campaign "European Union: working for you"?**  
**R: "Yes"**



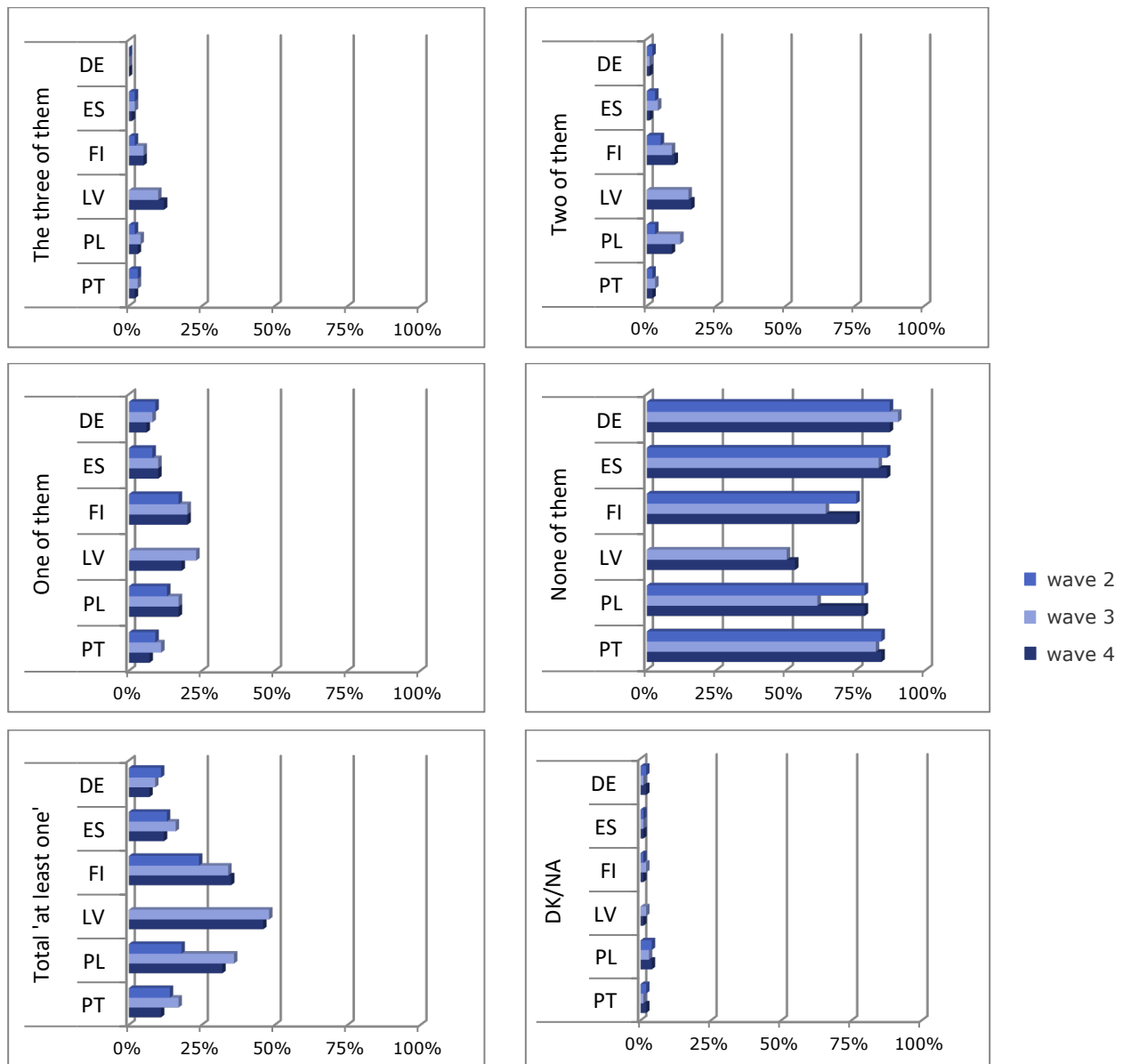
Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

Across the age groups and countries, the results of the Flash Eurobarometer surveys suggest that in Germany, Spain and Poland the group which reported seeing the campaign the most were people aged over 55. In Finland, these were the people in the 40-54 age group; and in Latvia – those aged 25-39. In Portugal the recall across the age groups was almost equal.

However, caution should be applied to interpreting the results for Germany and Poland, as in these countries the levels of recall reported in Wave 1 (when the campaign has not yet been implemented) are very close – or even exceed in case of Germany – the levels reported in the next waves.

Figure 16: Recall of the advertisements per remembered adverts <sup>10</sup>

Q3a [Respondents were read descriptions of three advertisement campaigns that ran in their country] Have you seen...?



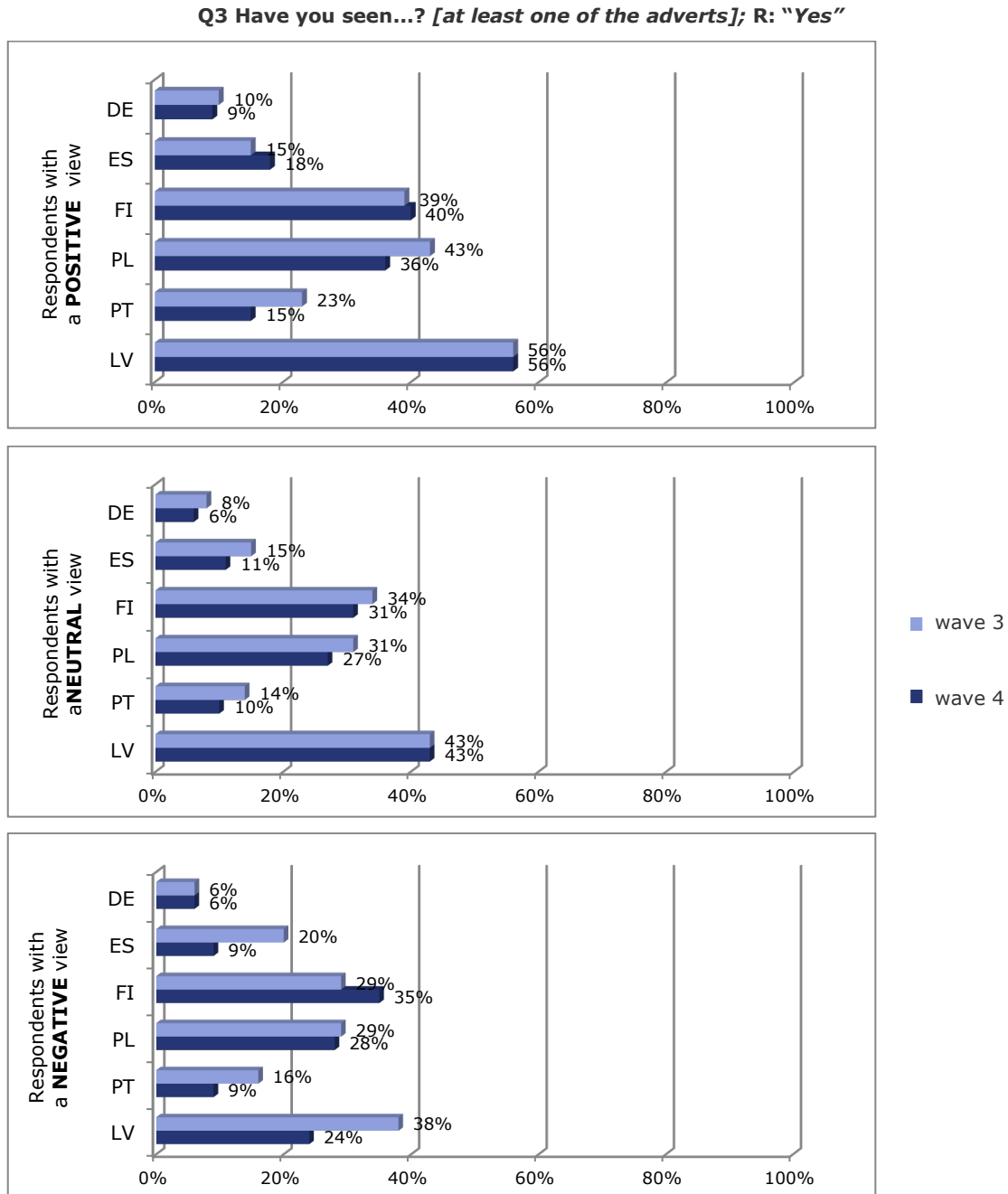
Source: Flash Eurobarometer surveys: 2009, 2012, 2014, 2015, 2017.

The results are consistent with the responses to Q2. (if people have seen, read or heard about the campaign). In that responses for Poland, Finland and Latvia suggest that again the campaign had greatest reach and recall in these countries, with more than one third of the adult population reporting seeing at least one advert. The note of caution in the interpretation of these results is that respondents are asked to respond to the question over the phone, i.e. without seeing the advert, which made it more difficult for respondents to be certain that they had seen one or more adverts. The omnibus survey, conducted as part of the evaluation, helped to mitigate this limitation, as respondents were able to watch campaign's videos, which were embedded directly into the survey.

<sup>10</sup> This question was not asked in Wave 1 of the Flash EBs.

The graphs below explore the results of reported recall of the campaign in more detail, depicting the levels of campaign's reach disaggregated by the respondents' views of the EU, self-reported living place and age.

**Figure 17: Recall of the advertisements, per view of the EU<sup>11</sup>**



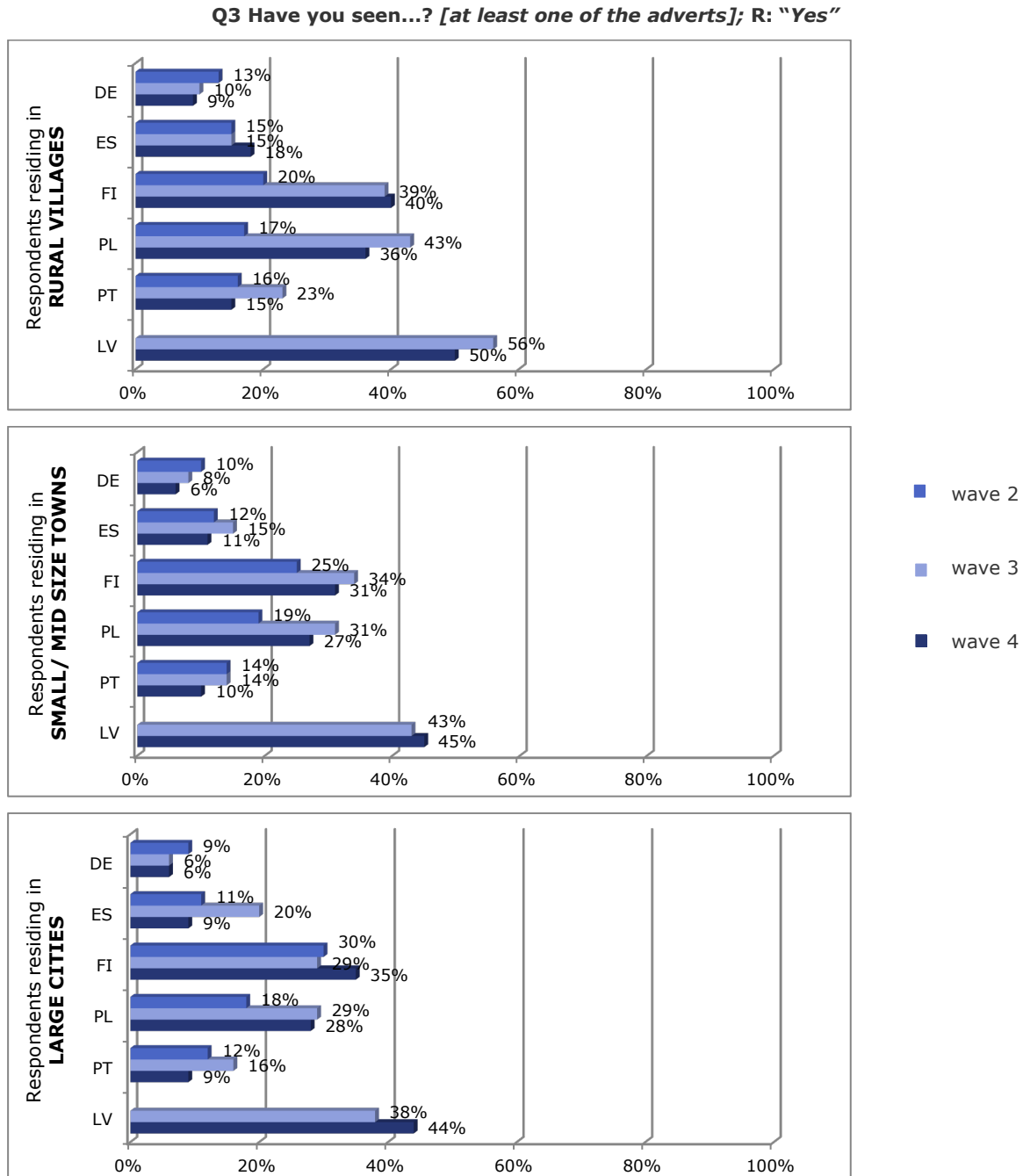
Source: Flash Eurobarometer surveys: 2012, 2014, 2015, 2017.

As visible from the graph above, the highest levels of recall (56%) were reported among the Latvian respondents with the positive stance towards the EU. In all of the countries except Spain, people with a positive view were the most likely to recall at least one advert. The response levels from respondents with neutral and negative opinion were similar. Although in Spain a larger proportion of those with a negative view (20%) reported seeing at least

<sup>11</sup> Data from the Flash EB surveys for Wave 2 did not disaggregate Q3 by respondents' view of the EU.

one advert more than those with a neutral view (15%). In Latvia, more neutrals (43% in both waves) saw at least one advert than those with a negative view of the EU.

**Figure 18: Recall of the advertisements, per urbanisation**



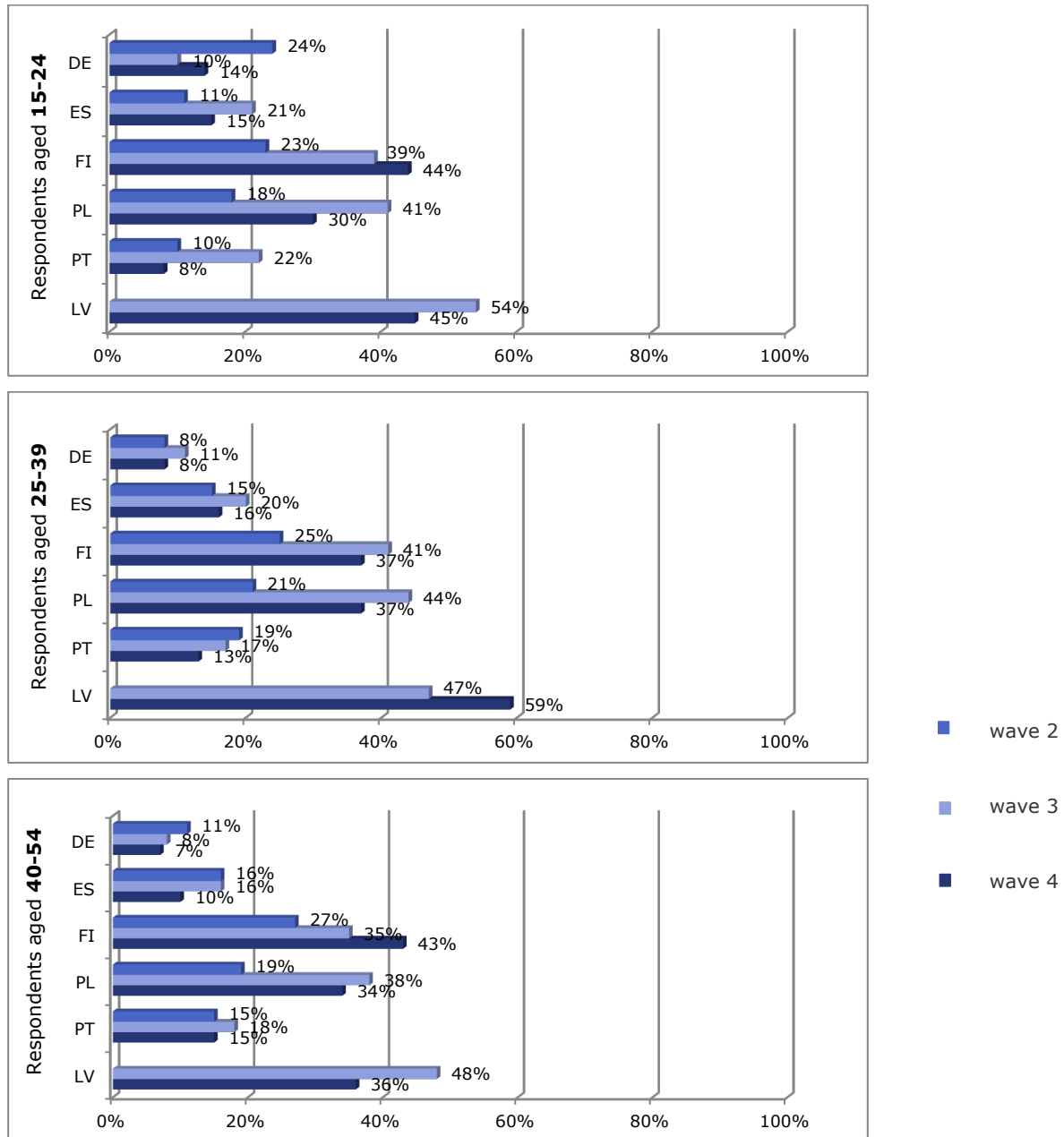
Source: Flash Eurobarometer surveys: 2009, 2012, 2014, 2015, 2017.

The results of recall of at least one advert desegregated by respondents' self-reported living place suggest that there have not been significant differences in the recall of the campaign between different people living in rural and urban locations within the same country, apart from Latvia and Poland. In the case of Latvia, a distinguishably high level of recall can be noted among rural residents (56% reported in Wave 3), compared to small and mid-size towns (43% in Wave 3) and large cities (38% in Wave 3). In Poland in Wave 3 43% of

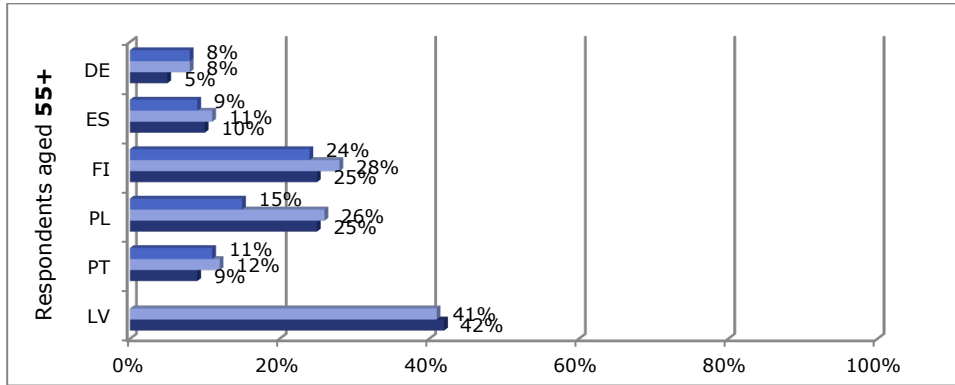
rural residents reported to have seen at least one advert, compared to 31% and 29% in mid-size towns and large cities, respectively.

**Figure 19: Recall of the advertisements, per age**

**Q3 Have you seen...? [at least one of the adverts]; R: "Yes"**





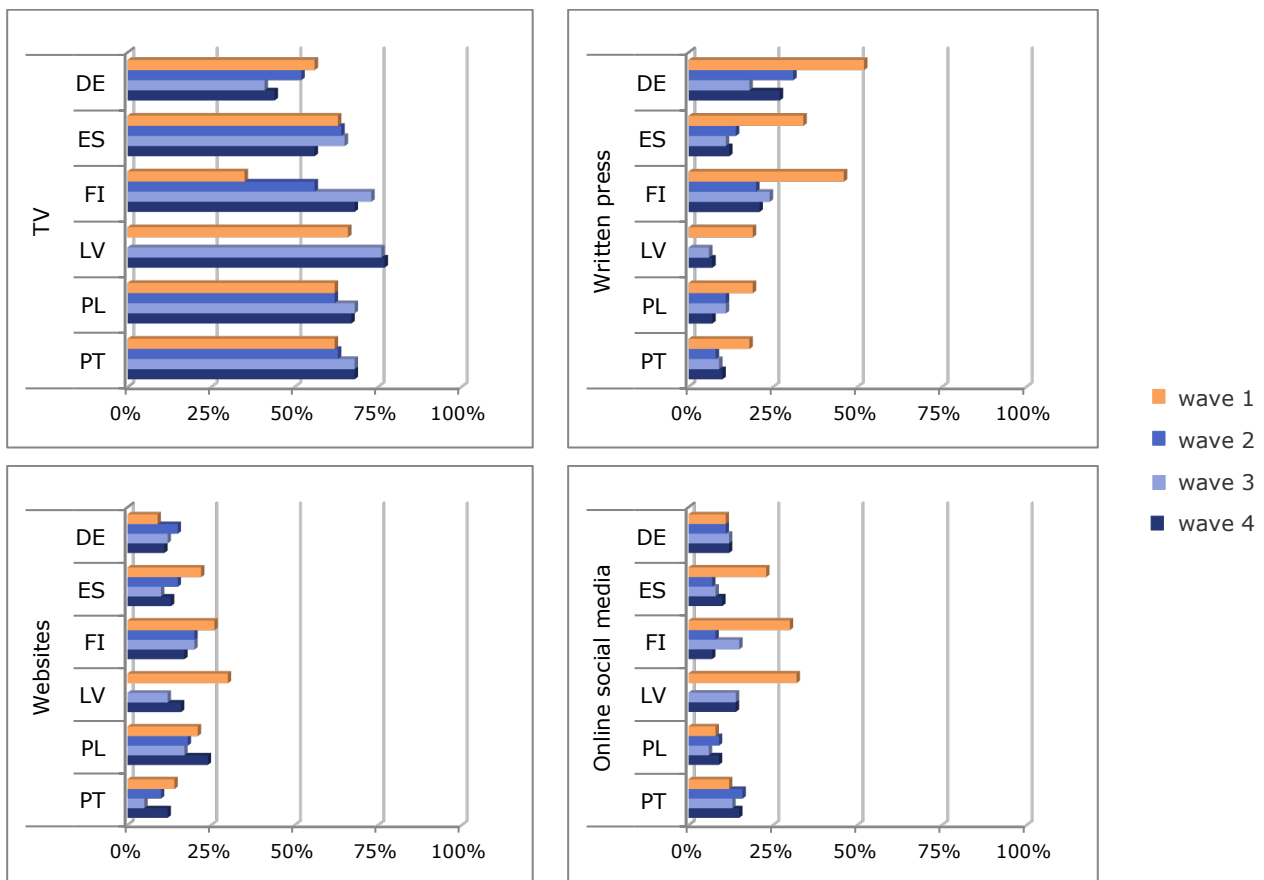


Source: Flash Eurobarometer surveys: 2009, 2012, 2014, 2015, 2017.

When desegregated by age groups, the results of the Flash Eurobarometer surveys suggest that in all of the countries people who were more likely to remember seeing at least one advert were aged under 55. In Germany, Finland and Portugal, when taking into account the top values of recall from the three waves - the highest levels of recall were reported by those aged 15-24. In Spain, Poland and Latvia it was the respondents aged 25-39 who reported the highest levels of adverts' recall.

**Figure 20: Reach of the campaign by channel**

**Q4a Did you see, read or hear about the campaign "European Union: working for you" through any of the following means....? (multiple answers possible)**



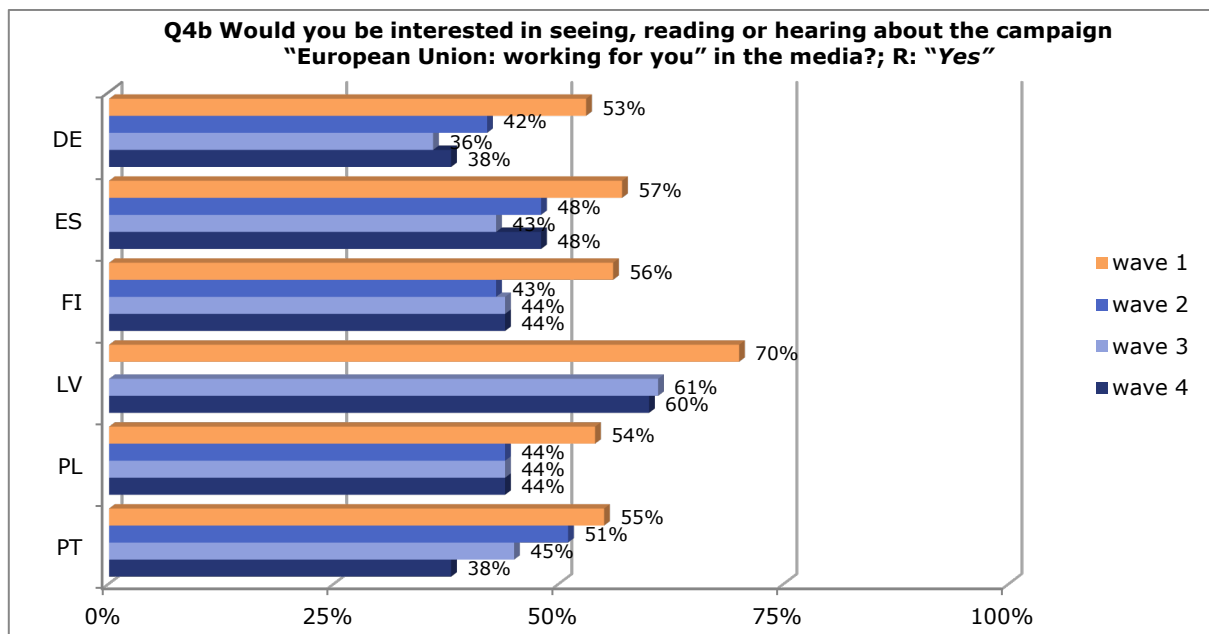
Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

To be noted here is that these results were only provided by respondents who indicated that they had seen one of the campaign adverts and to those who claimed that they had seen, read or heard about the campaign. The results indicate that the television adverts achieved greater levels of reach than the other mediums.

When considered by country, print adverts achieved proportionately better coverage in Germany and Finland amongst respondents who say they saw the adverts. There is no indication from the results which websites the respondents refer to when they state that they have seen the adverts on websites.

### 2.2.3 Interest in further information

Figure 21: Interest in the campaign in the media by those who have not seen it

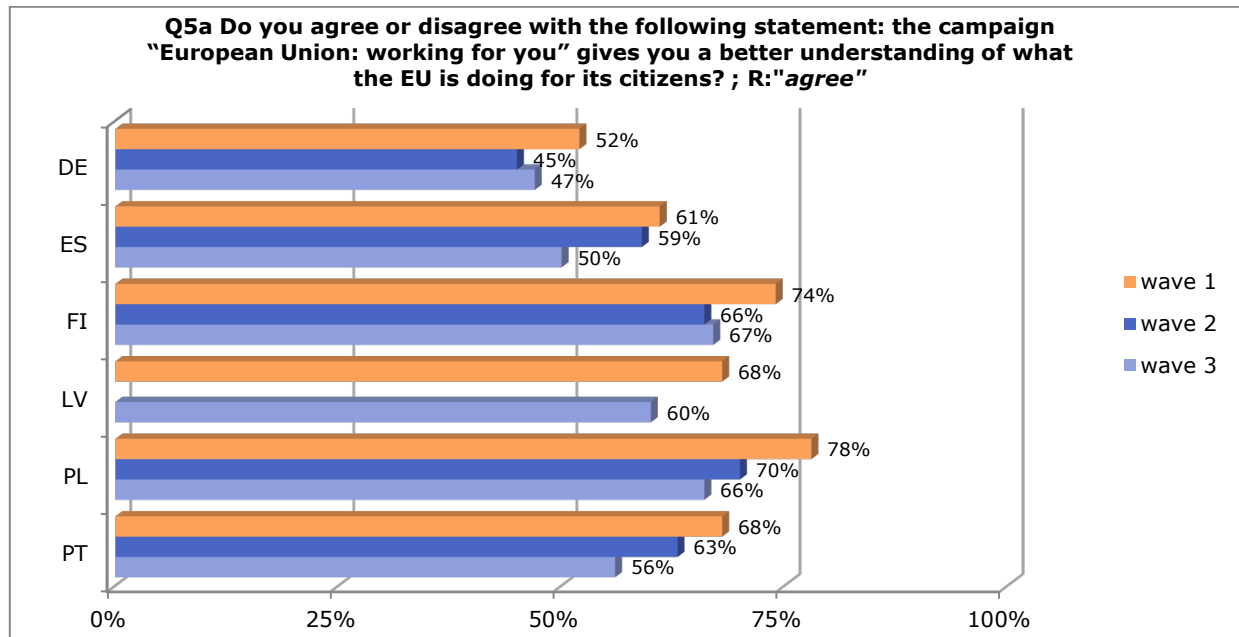


Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2014, 2015, 2017.

This question was asked only of the respondents who indicated that they had not seen, heard or read about the campaign. The findings indicate that, overall the interest in information on the campaign in the media exceeded 50% in Wave 1 and then maintained a relatively stable level, ranging between 44% and 40%. Portugal was an exception to this overall trend with a decrease of 13% from wave 2 to wave 4. In Spain, Finland and Poland the interest levels remained stable, indicating that over 40% of respondents who had not seen the campaign in those countries sustained a level of interest in hearing about the campaign.

## 2.2.4 Extent campaign increases understanding of what the EU does

Figure 22: Extent campaign increases understanding of what the EU does<sup>12</sup>



Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2015.

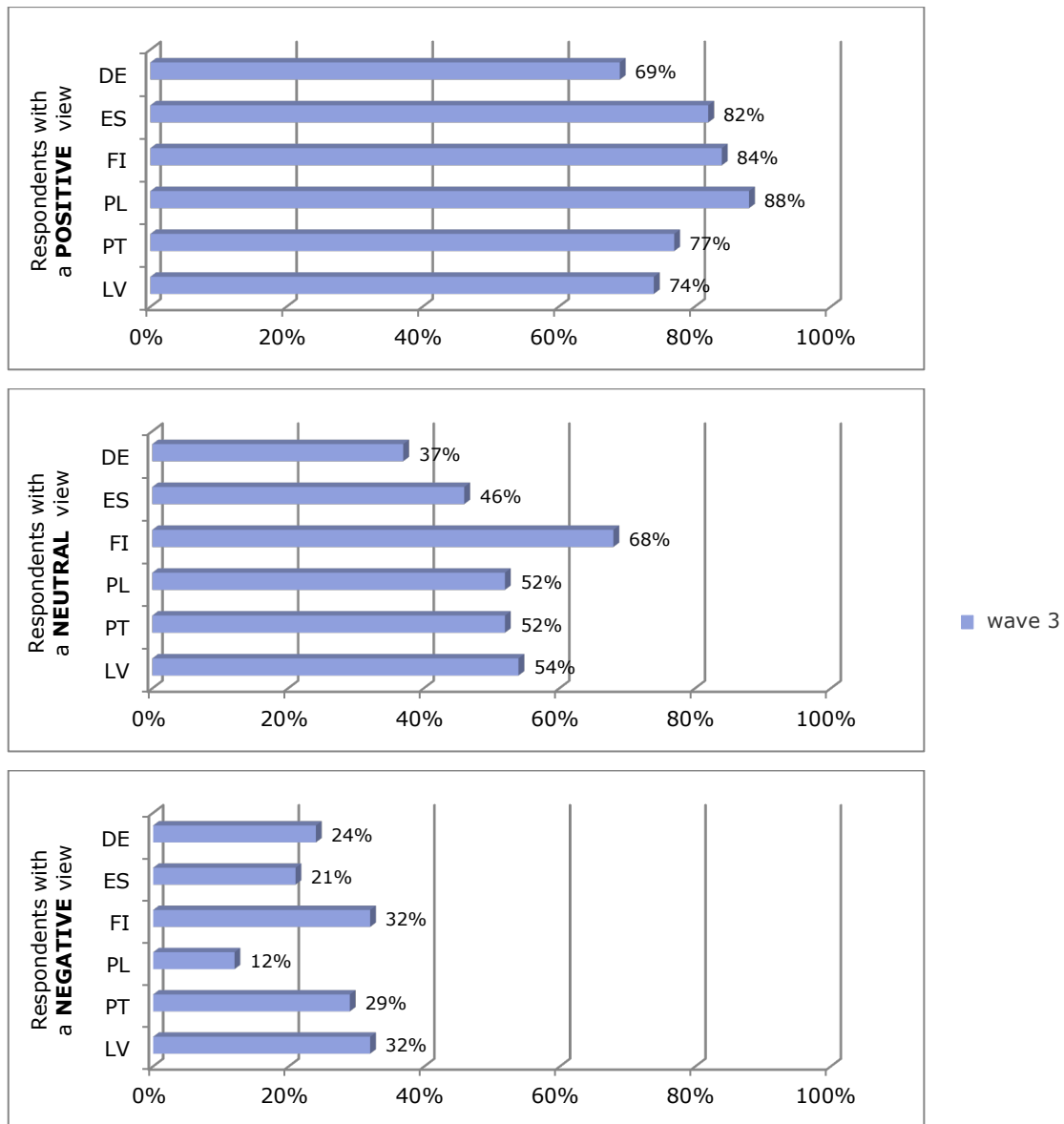
This question was asked only of the respondents who indicated that they had seen, read or heard about the campaign. Overall, the results indicate similar levels of agreement between wave 2 and wave 3 in Germany and Finland that the campaign gave a better understanding of what the EU does. There was reduction in levels of agreement with the statement between waves 2 and 3 in Portugal (63% to 56%) and Spain (59% to 50%).

Citizens in Finland and Poland were those who agreed most with the statement. Citizens in Germany were least in agreement with this statement.

<sup>12</sup> This question was not asked in Wave 4 of the Flash EBs.

Figure 23: Extent campaign increases understanding of what the EU does, per view of the EU<sup>13</sup>

Q5a Do you agree or disagree with the following statement: the campaign "European Union: working for you" gives you a better understanding of what the EU is doing for its citizens?  
R: "agree"



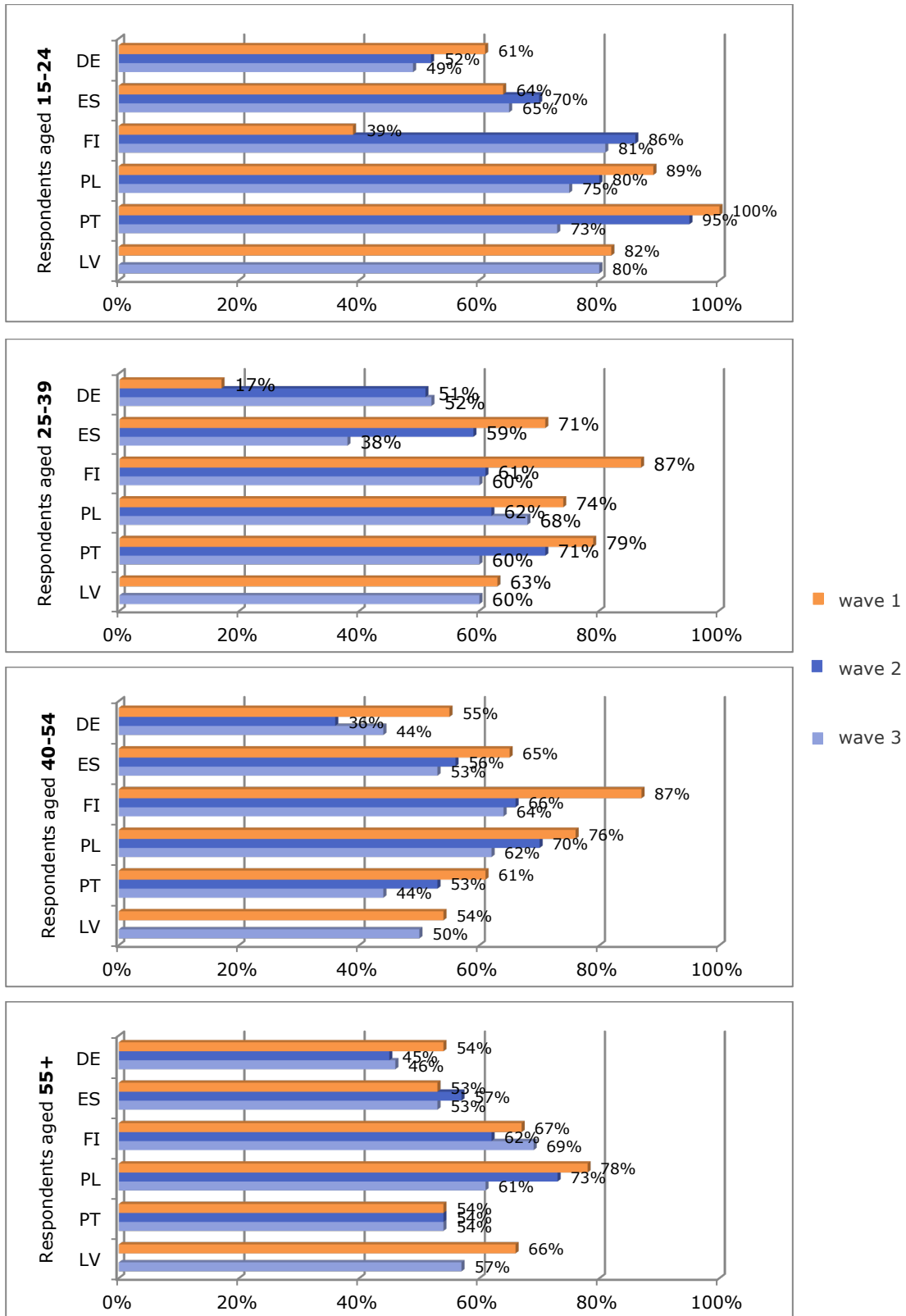
Source: Flash Eurobarometer surveys: 2012, 2015.

Wave 3 was the only wave of the surveys which offered data on this question disaggregated by the respondents' view of the EU. As visible from the figure above, in all countries people with a positive view of the EU agreed strongest with the statement (from 69% in Germany to 88% in Poland). The proportion of respondents with a neutral view of the EU who agreed with the statement ranged from 37% in Germany to 68% in Finland. Finland stands out as the country where the highest proportion of people with a neutral viewpoint agreed that the campaign was giving them a better understanding of what the EU was doing. Amongst people with a negative view, the results suggest circa 1 in 5 still understood more what the EU was doing as a result of the campaign. The exception to this result is Poland where 12% of respondents agreed with the statement.

<sup>13</sup> Data from the Flash EB surveys for Wave 1 and Wave 2 did not disaggregate Q3 by respondents' view of the EU.

Figure 24: Extent campaign increases understanding of what the EU does, per age

Q5a Do you agree or disagree with the following statement: the campaign "European Union: working for you" gives you a better understanding of what the EU is doing for its citizens?  
R: "agree"



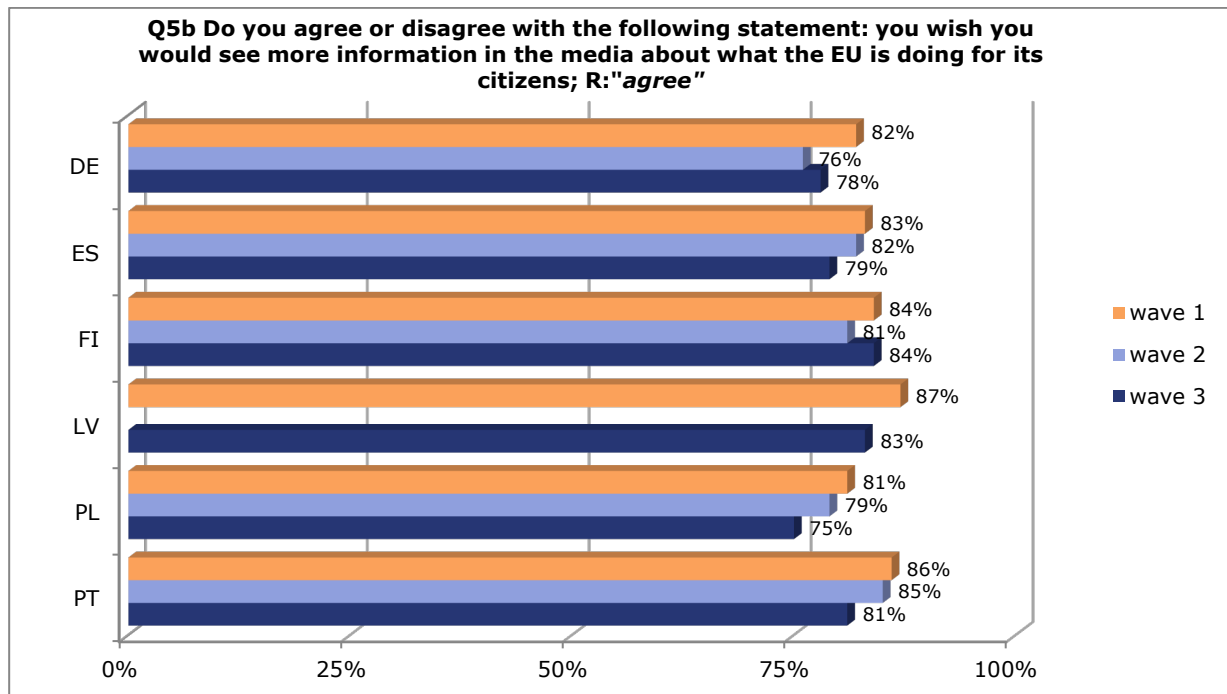
Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2015.

The figure above shows the analysis of the respondents' agreement with the statement posed in Q5a disaggregated by age. In all countries except Germany most respondents who agreed with the statement belonged to the youngest age group (15-24). In Germany similar responses were received from the two youngest age groups (15-24 and 25 – 39). The strongest level of agreement was in Portugal (95%) and in Finland (86%).

The results, however, need to be treated with caution, as in majority of the cases (bar the respondents aged 25-39 in Germany, 15-24 in Spain and 15-24 in Finland) the results stemming from Wave 1 were even higher than from the two following waves. In this respect, a data point which deserves highlighting is that in Portugal 100% of the respondents aged 15-24 agreed that a campaign which has not yet started gave them a better understanding of what the EU is doing for its citizens.

## 2.2.5 Desire for more information

Figure 25: Desire for more information in the media about what the EU does for citizens<sup>14</sup>

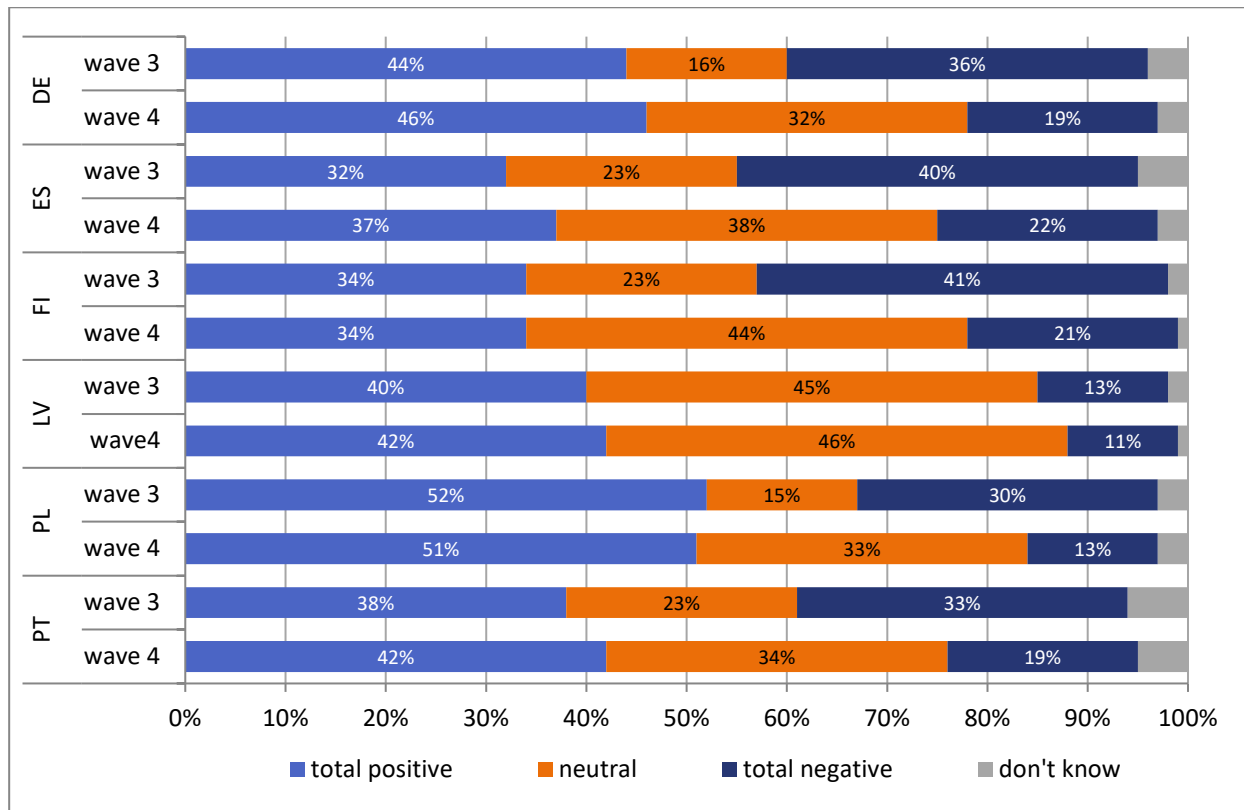


Source: Flash Eurobarometer surveys: 2004, 2006, 2009, 2011, 2012, 2015.

This question was asked of respondents who indicated that they had not seen any of the adverts. The results suggest that most people are interested in seeing more information in the media about what the EU is doing for its citizens. This result remained stable from Wave 1 to Wave 3, i.e. independently of the campaign's implementation.

<sup>14</sup> This question was not asked in Wave 4 of the Flash EBs.

**Figure 26: Positive, negative and neutral views on the EU <sup>15 16</sup>**



Source: Flash Eurobarometer surveys: 2012, 2014, 2015, 2017.

The comparison of the findings from the 3<sup>rd</sup> and 4<sup>th</sup> wave of the Eurobarometer surveys reveals that the proportion of respondents with neutral stance to the EU has increased in all countries. What is even more important is that this has been at the cost of the decrease in the number of persons with a negative stance towards the EU. Although it is not possible to attribute the increase in the proportion of people with a neutral view to the campaign, it is possible that the campaign has made a contribution to this outcome.

<sup>15</sup> This question was asked only in Wave 3 and Wave 4 of the Flash EBs.

<sup>16</sup> The evaluators noticed a mistake in the data provided to the EC in the Powerpoint presentation of the 3<sup>rd</sup> Eurobarometer wave. The total proportions of "neutrals" and "negatives" should be in fact 19% and 36% respectively, not the other way around.

### 3. Annex 1C: Omnibus survey results

The omnibus surveys were used as a mechanism to gather fast feedback on the campaign from large representative samples of the general public. The research goal for using this tool was to complement the data gathered through the European Commission's own Eurobarometer surveys, also carried out during the time frame of the Pilot. By using omnibus surveys we were able to show video clips to survey participants, which was not feasible via the Eurobarometer telephone survey.

Questions were agreed with DG COMM in advance and then inserted into the weekly on-line omnibus surveys run by our partners Ipsos MORI. Ipsos' online panel has one of the strongest coverage in the world, with panels in all the major markets in Europe and other countries. On-line panels are well established have been used to conduct almost every type of research online, including campaign testing. The insertion of questions into the weekly surveys was timed to take place immediately after the second wave of TV advertising. The survey generated a minimum of 1,000 responses per country from participants aged 16-70.

When the survey is launched in each country, quotas are set on age, gender, region and employment to reflect the national profile of that particular country. When the online survey is live, these quotas are monitored by Ipsos panel teams to ensure that we are meeting the right proportions relevant to that profile. Once fieldwork is closed, we then make any final adjustments to the data by applying weighting. This ensures that we have not over- or underrepresented any one group and that the data is representative of the population of that country.

The questions asked during the survey were as follows:

- **Q1: *In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?***

The question was a single-choice, with the respondents choosing between the following options: 'very positive', 'fairly positive', 'neutral', 'fairly negative', 'very negative' and 'don't know'. This question, which was also posed in the Eurobarometer survey, is included to facilitate comparison with responses to Eurobarometer.

- **Q2: *Have you seen any recent adverts around the theme of 'European Union: working for you'?***

The question was a single-choice one, allowing the participants to choose between 'yes', 'no' and 'don't know'. The purpose of this question was to test reach and unprompted recall of the advertisements.

- **Q2a: *What did you see/hear in the advertising?***

This was an open question, which allowed the participants to freely type in their views. Additionally, it included the options 'don't know' and 'refuse' for persons who decided not to offer any comments on this matter. This question served principally to allow us to double check that respondents were referring to the EU Pilot.

- **Q2b: *What else did the advertising tell you?***

The question was also an open one, and similarly to the previous questions it allowed the respondents to freely express their views, or indicate 'don't know', or refuse answering.



After the two open questions, the participants were shown the advertising clip relevant to their country, i.e. the clip in the native language corresponding to the key campaign topic chosen for a given country. This was followed by questions relating to the just shown clip:

- **Q3: *Have you seen this advert on television recently?***

The question allowed the respondents to make a single choice between 'yes', 'no', 'seen something similar' and 'don't know'. This question was used to test reactions to a specific advert.

- **Q4: *What difference, if any, does this advert make to your feelings about the EU?***

The survey participants could choose from six single-choice options on a Likert-type scale: 'makes you much more positive, makes you slightly more positive', 'makes no difference', 'makes you slightly more negative', 'makes you much more negative' and 'don't know'. The question was included to test the impact of the advertisements.

This was followed by a question that intended to measure the willingness of the participants to consider sharing the just seen clip on social media:

- **Q5: *How likely or unlikely, if at all, are you to consider sharing this advert on social media?***

This was a closed question, in which the respondents could choose from a scale of: 'very likely', 'fairly likely', 'not very likely', 'not at all likely' and an option 'don't know'.

To put the previous question into perspective, we also measured the declared social media consumption.

- **Q6: *How frequently do you use social online media or online sources/sites to follow, get information about, discuss, etc. public policy, social and/or political issues?***

This closed question allowed the participants to choose one of the following answers: 'several times a day', 'Every day or almost every day', '2-3 times a week', 'Once a week', '2-3 times a month', 'Once a month/less often', 'Never' and 'Don't know'.

The sections below present the detailed results of the omnibus surveys with general population carried out to date, in each of the six countries focal countries of the campaign (DE, ES, FI, LT, PL and PT).

The results of the Latvian survey are not included in this document as this survey is due to take place after the drafting of this document on 6 March 2015, in-line with the advertising wave in Latvia.

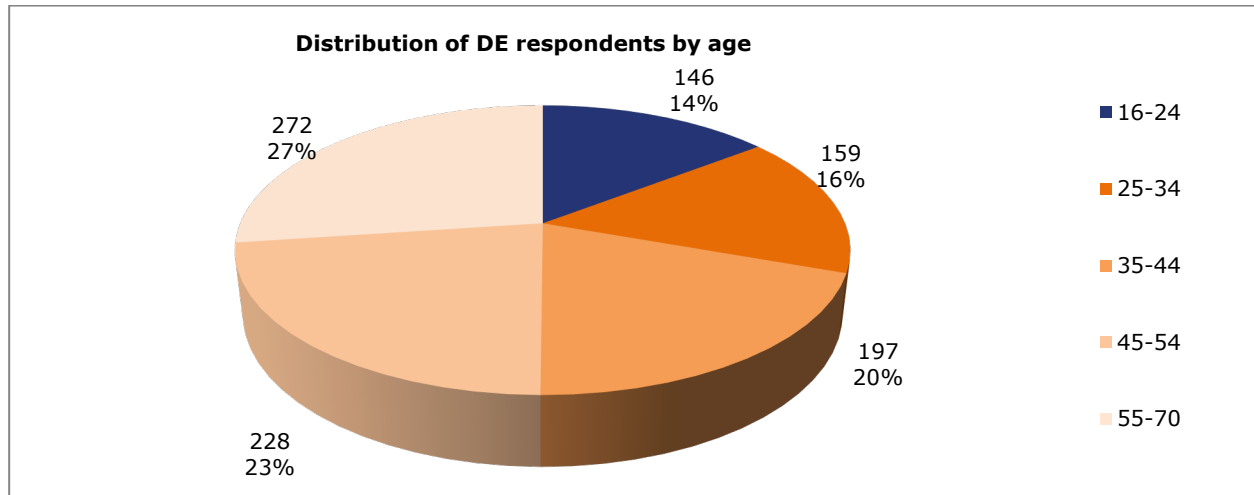
### 3.1 Germany

The omnibus survey in Germany was carried out on the 6<sup>th</sup> February, six days after the completion of the second wave of the TV campaign.

#### 3.1.1 Germany respondents' profiles

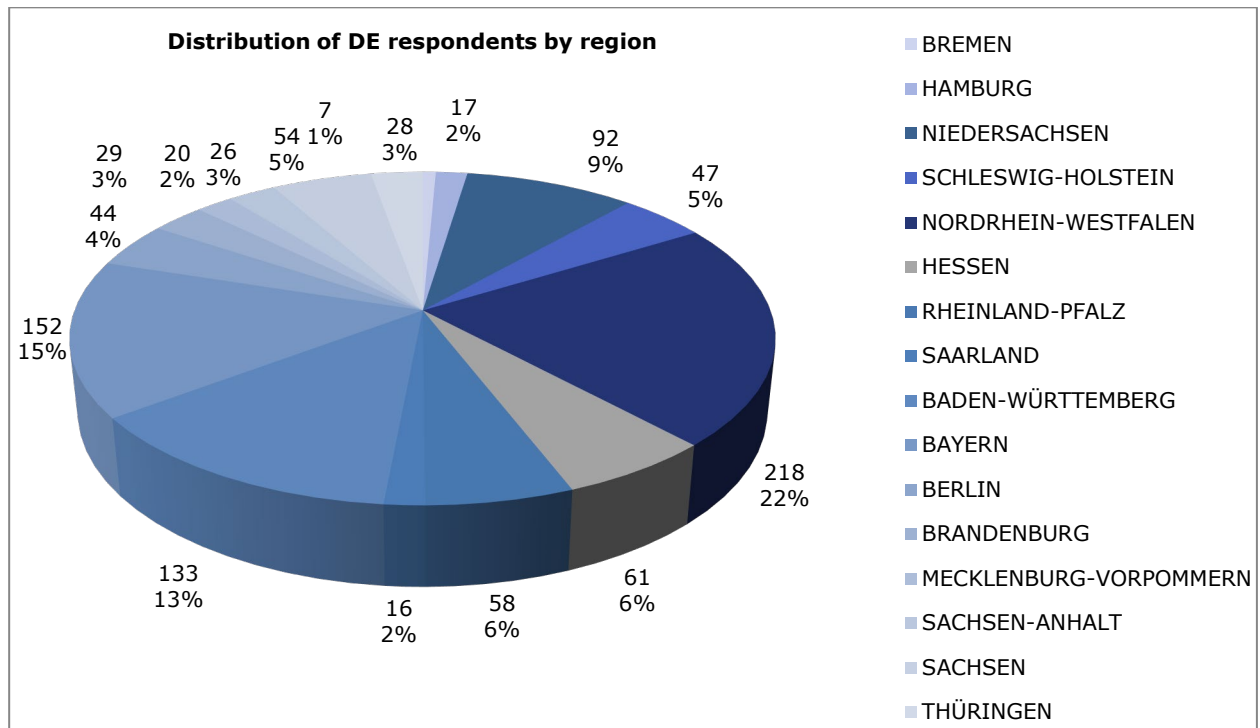
This section provides a description of the profiles of the 1002 respondents to the survey in Germany (out of which 508 were male and 494 female), according to their age, region of residence, employment situation and education level.

**Figure 27: Age distribution of German respondents**



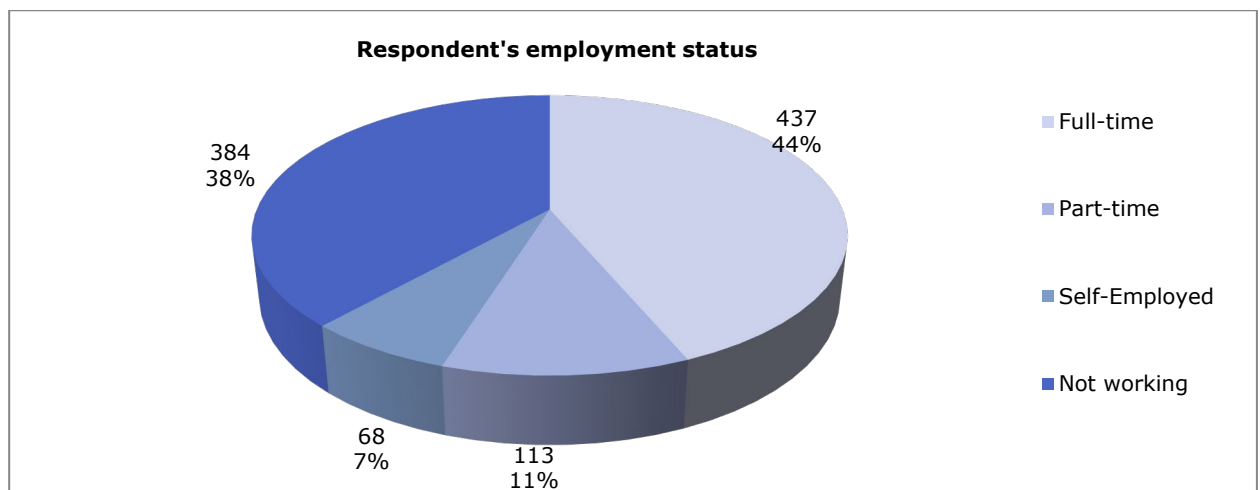
Respondents aged 55-70 accounted for the largest share of respondents, with 27% of respondents indicating that they belong to this age category, as shown in the figure above. Respondents aged 45-54 represented the second largest share, accounting for 22% of respondents, followed by respondents aged 35-55, 25-34, and 16-24, which accounted for respectively 19%, 17% and 15% of respondents. Respondents within the target age group of the pilot, which is 25-70, therefore accounted for 85% of respondents.

**Figure 28: Regional distribution of German respondents**



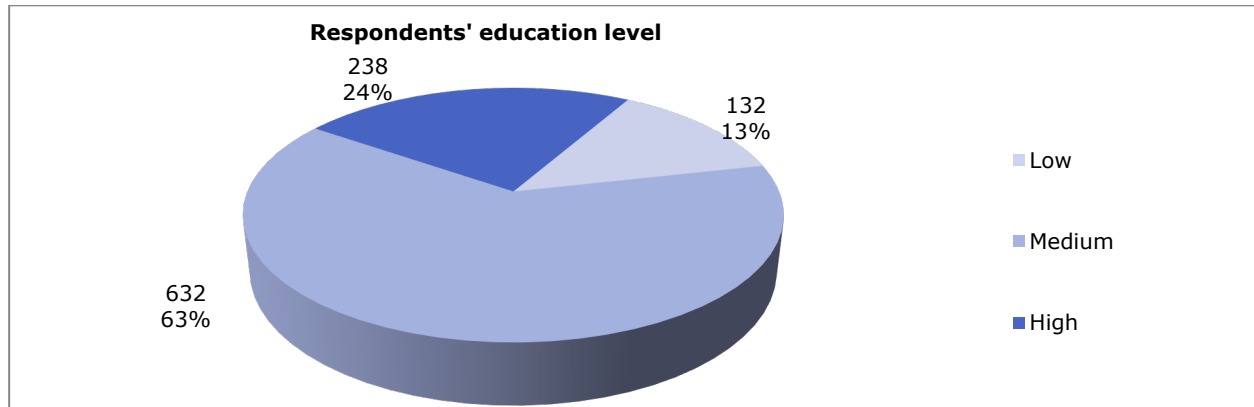
Respondents from Nordrhein-Westfalen accounted for 22% of total respondents, followed by respondents from the Bayern region, and Baden-Württemberg, which accounted for respectively 15% and 13% of respondents, as shown in the figure above.

**Figure 29: Employment status of German respondents**



The figure above reveals that full-time employed respondents accounted for the largest share of respondents, with 43% of respondents indicating that this was their employment status. The number of respondents, who indicated that they are not working<sup>17</sup> represented the second largest share, accounting for 39% of respondents, followed by part-time employed and self-employed respondents, which accounted for respectively 11% and 7% of respondents.

**Figure 30: Education level of German respondents**



Respondents having completed a medium education level accounted for the largest share of respondents, with 63% of respondents indicating that this was their education level, as shown in the figure above. Respondents having completed a lower education level represented the second largest share, accounting for 24% of respondents, followed by respondents having completed higher education level, which accounted for respectively 13% of respondents.

### 3.1.2 Key findings from the omnibus survey in Germany

A number of key findings can be drawn from the survey. These are:

- **In our survey, the largest group of respondents indicated that they felt neutral about the EU (40%).** The EU conjures up positive image for 34% of respondents, particularly for respondents aged 25-34, 16-24 and 55-70. In general **the 25 – 34 age group seem to have the most mixed views on the EU**, being the most positive but also the most neutral compared to respondents in the other age ranges. A slight difference can be observed with the data stemming from the 3<sup>rd</sup> wave Eurobarometer, as the number of respondents with a positive image of the EU has decreased by 4 percentage points.
- **The EU campaign did not penetrate well in Germany. Only 10% of respondents indicated that they had seen the adverts**, and in particular respondents aged 25-34 and 16-24, and respondents with a positive image of the EU. This result is the lowest result of all the surveys carried out to date and **raises questions over whether there was sufficient coverage in Germany** or whether the adverts were simply not striking enough for German audiences.

<sup>17</sup> This group is likely to include students, family carers and those who have retired, as well as those registered unemployed.

- **When shown a specific advert (Online purchasing safety, with Anna and Luka from Cologne), 90% confirmed that they had not seen it or anything similar. Only 6% of respondents indicated that they had seen the advert on TV.**
- **For most people (71%), the advert made no difference on their feelings about the EU,** 15% indicated that it made them more positive about the EU, whereas 4% indicated that it made them feel less positive. The advert, therefore, had a 'net positive' impact of 11%.
- **A small proportion of respondents (10%) would be likely to share the advert on social media,** and particularly respondents aged 25-34, as well as those that have a positive image of the EU.

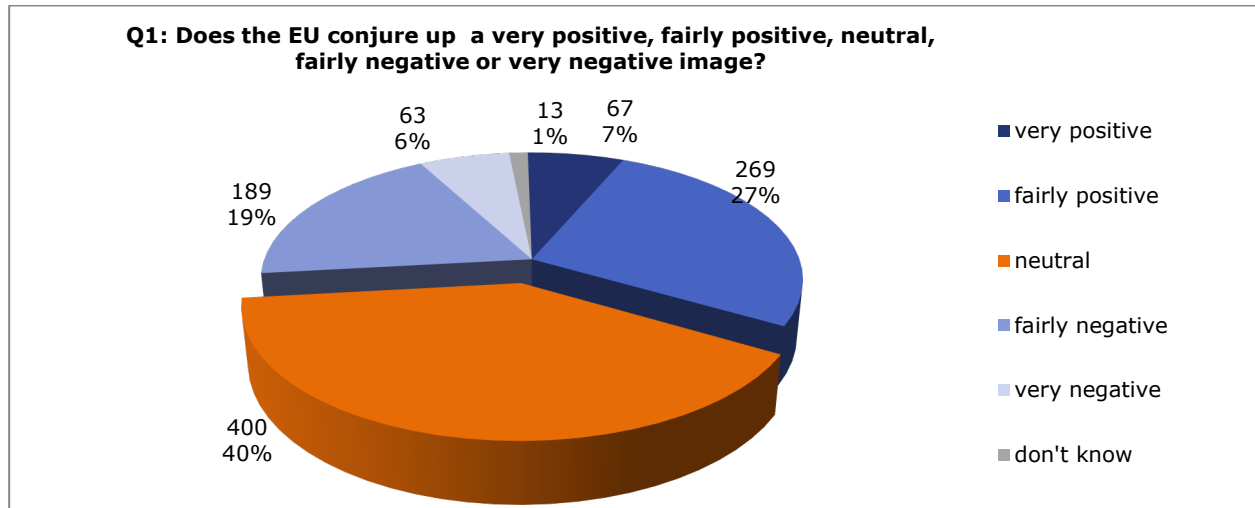
### 3.1.3 Omnibus survey results for Germany

This section provides the results of the questions asked to the respondents of the survey.

#### Perceptions of the EU

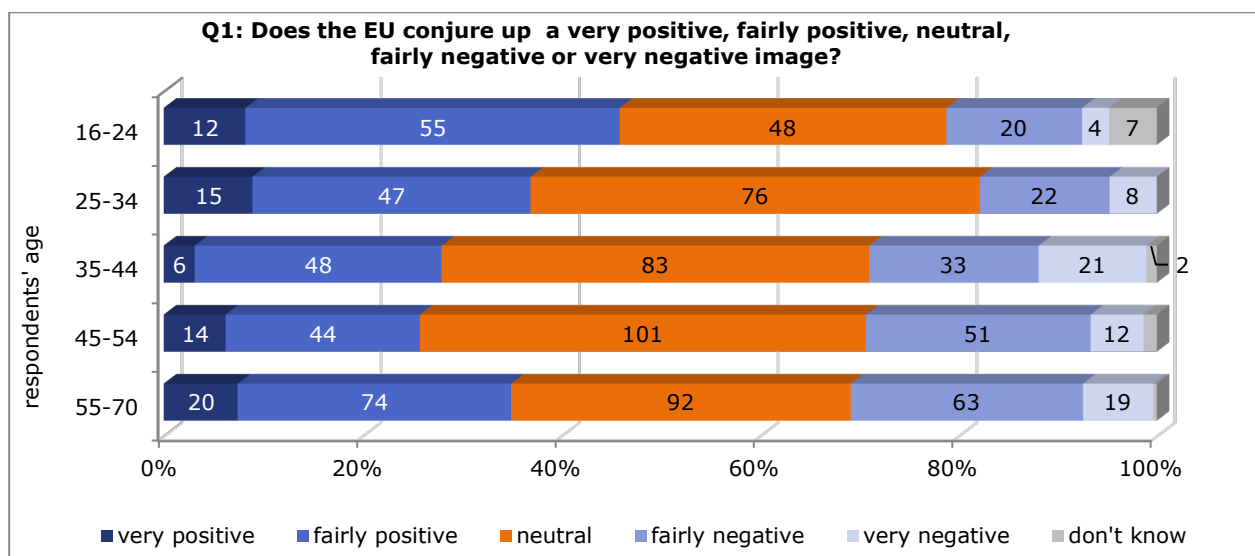
The first question relates to the perception that respondents to the survey have of the EU.

**Figure 31: Image of the EU in Germany across all respondents**



The EU conjures up a neutral image for 40% of respondents to the survey in Germany, whereas it conjures up a fairly positive image for 27% of respondents, and fairly negative for 19% of respondents, as shown in the figure above. Overall, the EU conjures up a positive image for 33% of respondents, and a negative image for 25% of respondents. Compared with the 3<sup>rd</sup> wave Eurobarometer data, the number of respondents with a very positive image of the EU is 3 percentage points higher, the number of respondents with a fairly positive image of the EU is lower by 7 percentage points. The number of respondents with a neutral image of the EU is 1% lower. Overall, the number of respondents with a positive image of the EU in this survey is 4% lower than the figure reported in Eurobarometer, which is within the survey's margin of error.

**Figure 32: Image of the EU in Germany, per age group**

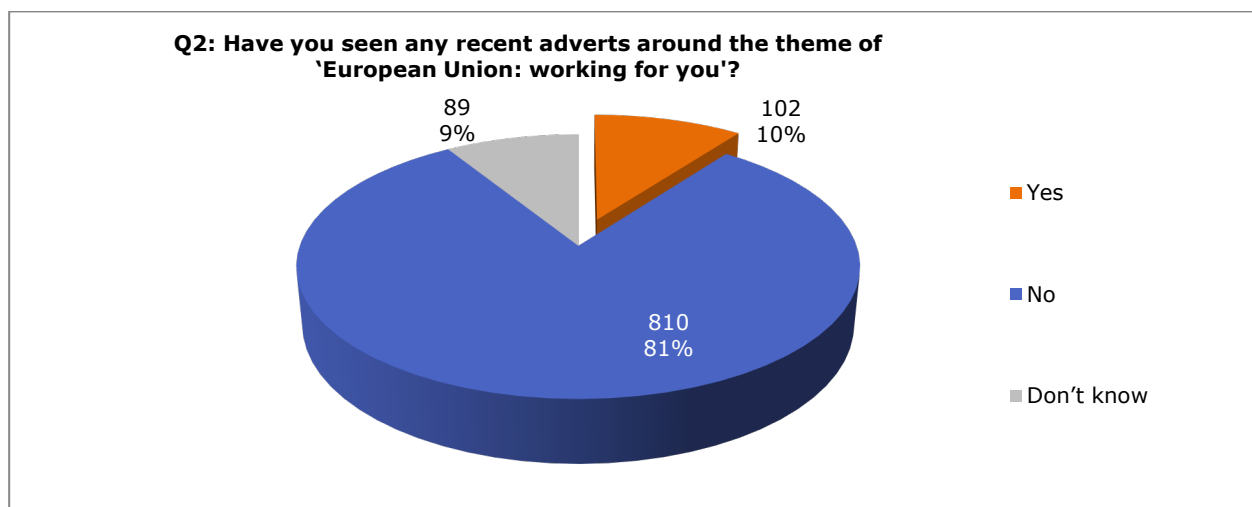


A further breakdown of these results per age category, reveals that 46% of respondents aged 25-34 have a neutral image of the EU, followed by 45% of respondents aged 45-54, 43% of respondents aged 35-44, 32% of respondents aged 55-70 and 32% of respondents aged 16-24. It also worth noting that people aged 25-44 are also the most likely to have a positive image of the EU, followed by people aged 16-24 and 55-70. Indeed, respectively 9% and 28% of respondents aged 25-34 indicated that the EU conjured up either a very positive, or a positive image, whereas this was also the case for 8% and 38% of respondents aged 16-24 and 8% and 28% of respondents aged 55-70. Conversely, 11% of respondents aged 35-44 have a very negative image of the EU.

### **Unprompted recall of adverts**

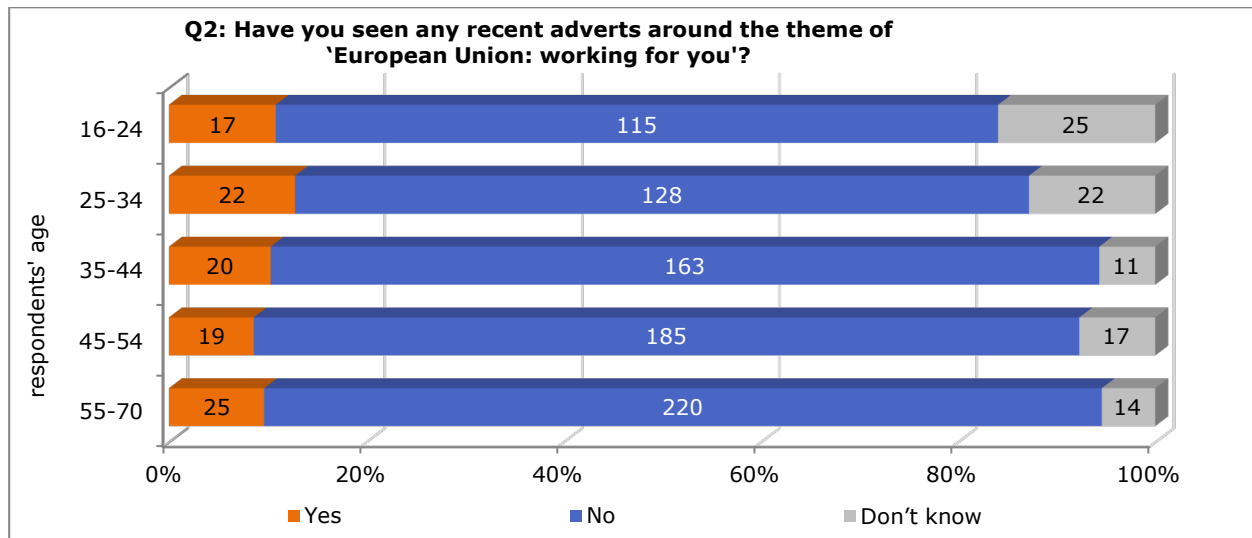
The seconded question relates to the whether participants recalled the adverts.

**Figure 33: Visually unprompted recall of the adverts in Germany**



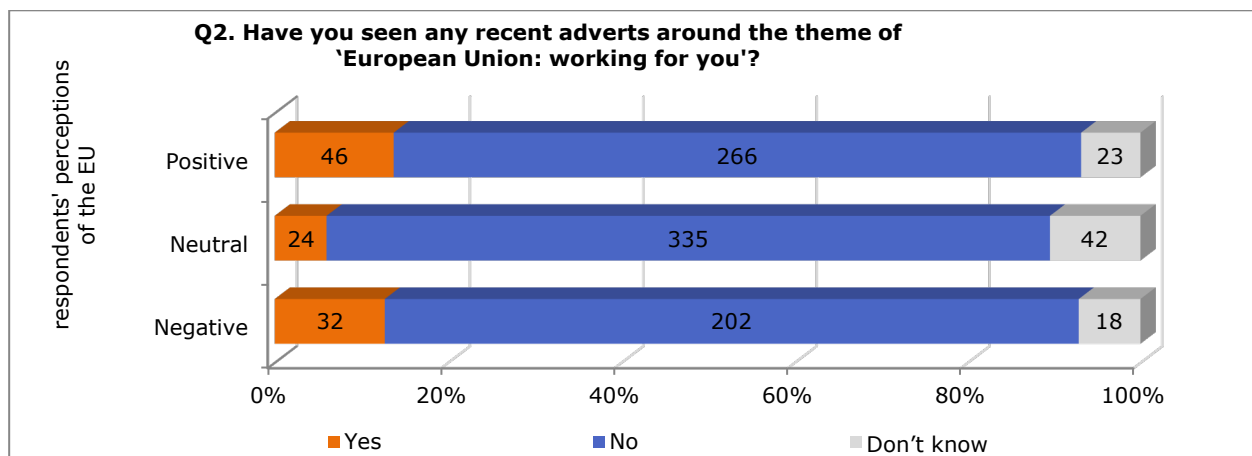
The figure above reveals that 81% of respondents indicated that they had not seen any recent adverts around the theme of 'European Union: working for you'. However, 10% of respondents indicated that they had seen the adverts, and 9% indicated that they did not know. This result is aligned with Eurobarometer statistics, which suggest that the campaign has not been able to penetrate well in Germany.

**Figure 34: Visually unprompted recall of the adverts in Germany, per age group**



A further breakdown of the results according to the age of respondents shows similar levels of unprompted recall across the age groups. However, respondents aged 25-34 and 16-24 were slightly more likely to have seen the adverts with respectively 13% and 12% of respondents having indicated that they had seen the adverts, as opposed to 10%, 9% and 8% for respondents respectively aged 35-44, 55-70 and 45-54. However, these younger age groups were also more likely to feel unsure as to whether or not they had seen the adverts. Conversely, 84% of respondents aged 35-44 indicated that they had not seen the adverts, as opposed to 77% of respondents aged 25-34.

**Figure 35: Visually unprompted recall of the adverts in Germany, per perceptions of the EU**



The figure above reveals that respondents with a positive image of the EU were the ones that indicated that they had most seen the adverts, with 14% indicating that this had been the case, as opposed to 13% for respondents having a negative image of the EU, and 6% of those with a neutral view. Furthermore, 79% of respondents with a positive image of the EU indicated that they had not seen the adverts, as opposed to 80% of respondents with a negative image, and 84% for respondents with a neutral image.

The survey participants who indicated that they have seen the advert were asked two **additional open questions**, namely:

- What did you see/hear in the advertising?



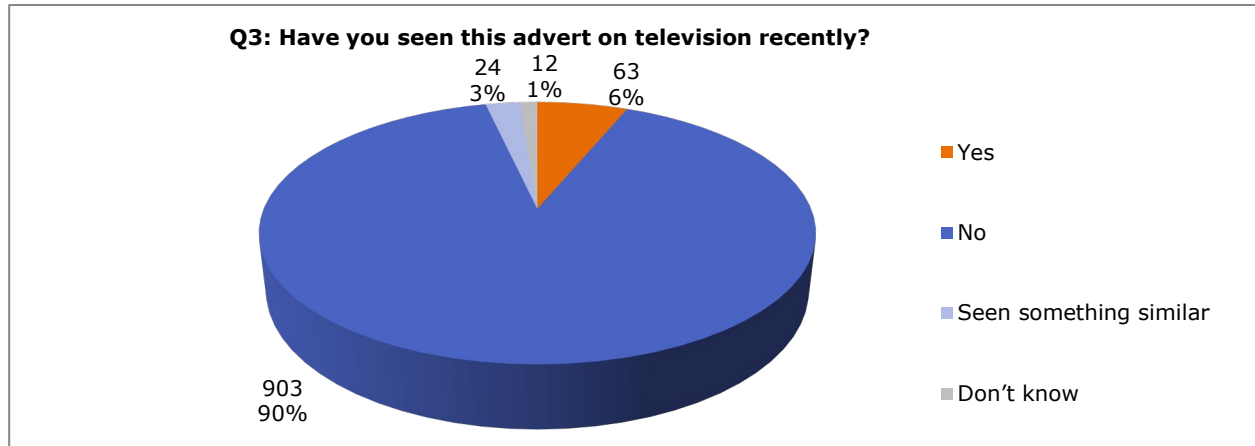
- What else did the advertising tell you?

Of the 102 respondents who did complete the open questions, a majority (66 out of 102) seemed to have remembered the adverts rather well, either quoting the campaign slogan or describing the adverts' themes (support for business creation, economic growth, opportunities for youth). This helps to ascertain that the results of unprompted recall did relate to the actual campaign to a good extent. For respondents that had seen the adverts, and viewed them negatively, the advert was associated with notions such as ridiculousness, self-portrayal and absurdity.

**Prompted recall of adverts**

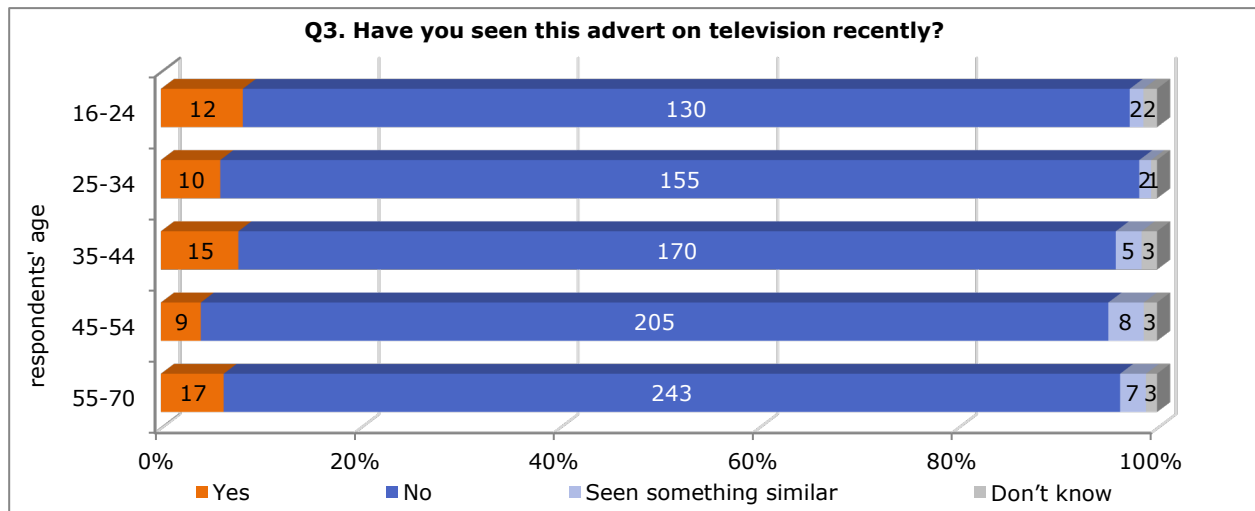
The respondents were shown the German advert on the theme of online purchasing safety (*Anna and Lukas from Cologne*).

**Figure 36: Visually prompted recall of the adverts in Germany**



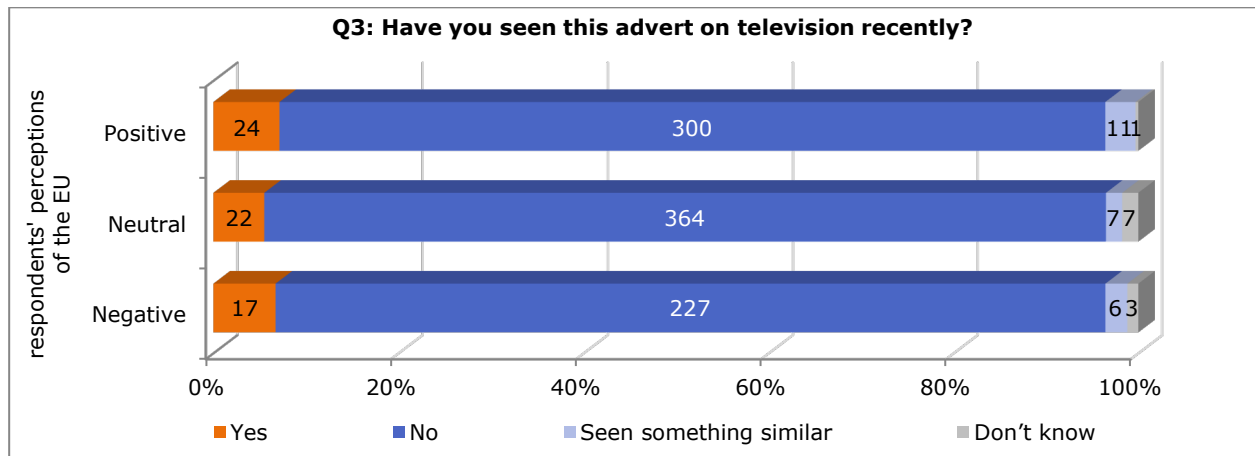
The figure above reveals that 90% of respondents indicated that they had not seen this advert or anything similar around the theme of 'European Union: working for you'. Six per cent of respondents indicated that they had seen the adverts, and 3% indicated that they had seen something similar. This result was similar to the unprompted recall results of Eurobarometer in the 2<sup>nd</sup> and 3<sup>rd</sup> Eurobarometer studies, where 9% and 11% stated that they had seen one of the adverts in Germany.

**Figure 37: Visually prompted recall of the adverts in Germany, per age group**



A further breakdown of the results according to the age of respondents shows that respondents aged 35-44 and 16-24 were proportionately the most likely to have seen the advert on television with 8% of respondents having in both cases indicated that they had seen the adverts. In comparison, only 6%, 6%, and 4% of respondents respectively aged 25-34, 55-70 and 45-54 indicated that they had seen the advert on television.

**Figure 38: Visually prompted recall of the adverts in Germany, per perceptions of the EU**

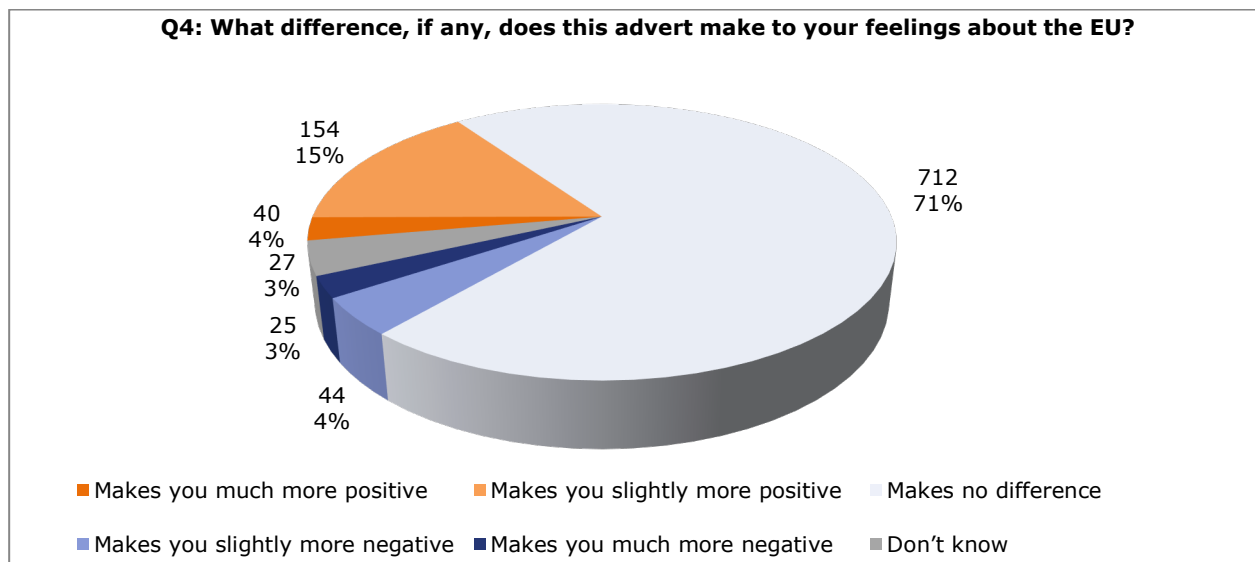


Finally, 91% of respondents with a neutral image indicated that they had not seen the advert on television, as opposed to 90% for respondents with a negative image, and 89% for respondents with a positive image of the EU. Additionally, the figure above reveals that both the respondents with a positive image of the EU, and the ones with a negative image of the EU, were the ones that most indicated that they had seen the advert on television, with 7% of respondents in both cases indicating that this had been the case. Only 5% of respondents with a neutral opinion indicated that they had seen the advert on television.

#### **Advert's impact on feelings towards the EU**

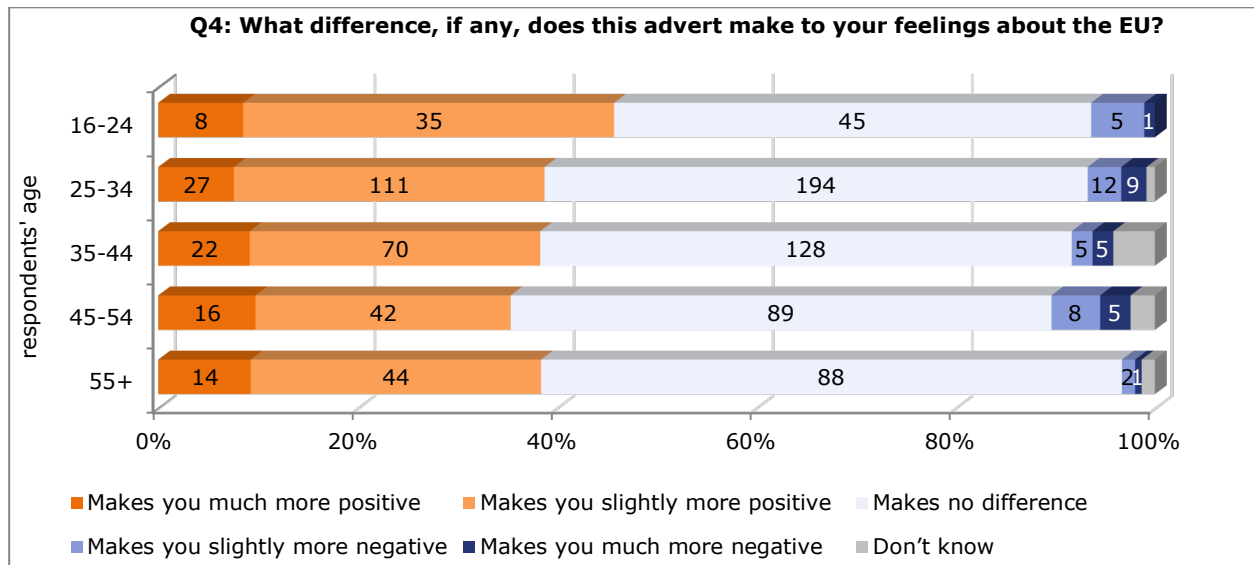
The fourth question relates to the advert's impact on feelings towards the EU.

**Figure 39: Advert's impact on feelings towards the EU in Germany**



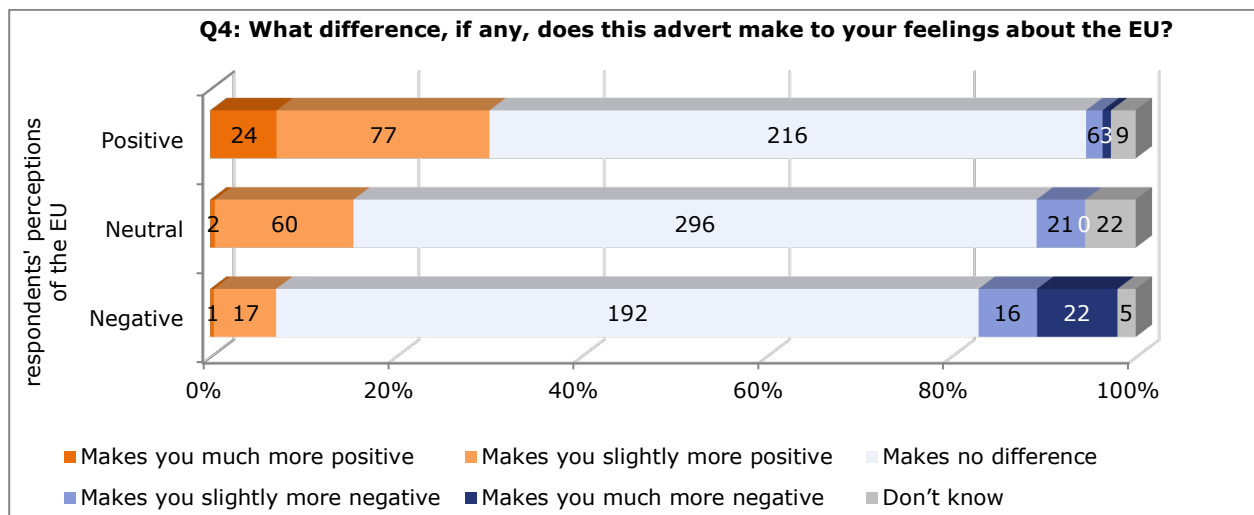
The overwhelming majority of respondents (71%) indicated that the advert made no difference on their feelings about the EU. However, 15% of respondents indicated that it made them much more positive, whereas 4% indicated that it made them slightly more positive. Conversely, 4% indicated that the advert made them feel slightly less positive, and 3% indicated that it made them feel much more negative. In conclusion, the advert had a 'net positive' impact of 11%.

**Figure 40: Advert's impact on feelings towards the EU in Germany, per age group**



A further breakdown of the results according to the age of respondents shows that 22% of respondents aged 25-34 indicated that the campaign had had a positive influence on their feelings about the EU, compared to respectively 18%, 18%, 17% and 16% for respondents aged 45-54, 55-70, 35-44 and 16-24. With regards to possible negative impacts there are somewhat negligible differences across the age ranges. Eight per cent of respondents aged 24-34 and 45-54, 7% of respondents aged 16-24 and 35-44, and 5% for respondents aged 55-70 indicated that the advert amplified their negative feelings towards the EU.

**Figure 41: Advert's impact on feelings towards the EU in Germany, per perceptions of the EU**



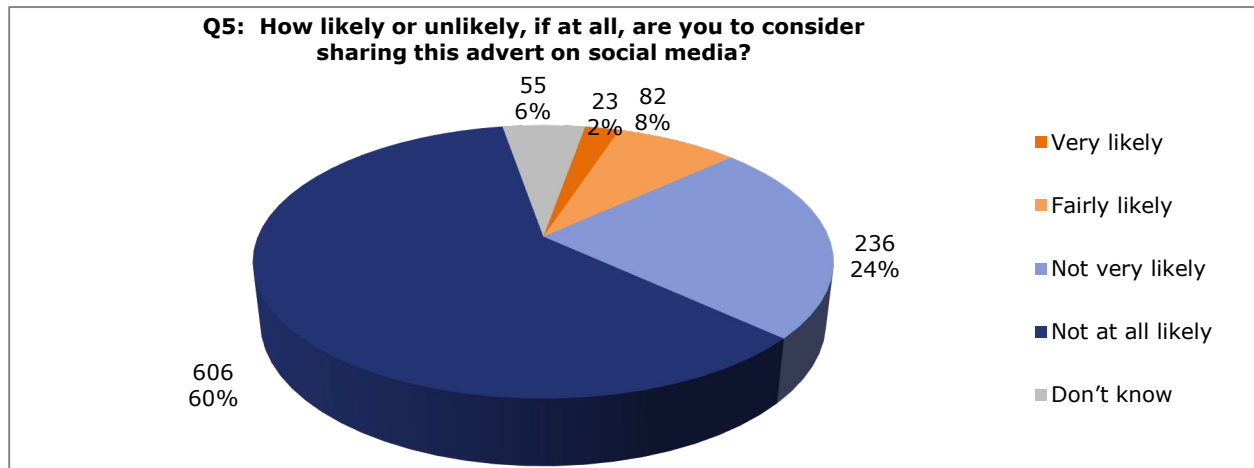
Finally, the figure above reveals that the advert had the most impact on people with a positive image of the EU. Overall, respectively 30%, 15% and 7% of respondents with a positive, neutral and negative opinion indicated that the advert made a positive difference on their feelings about the EU, whereas respectively 3%, 5% and 15% indicated that it had a negative influence, and 64%, 74% and 76% of respondents indicated that it did not make any difference.



### Advert and the social media

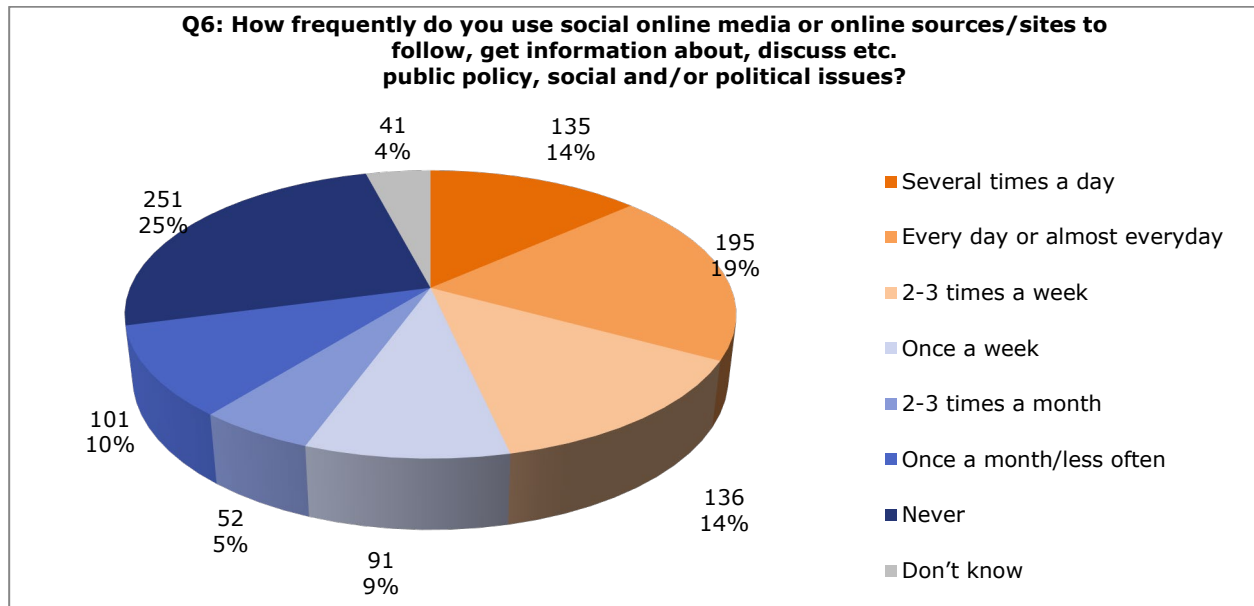
The fifth question relates to the likeliness of respondents sharing the advert on social media, whereas the sixth question relates to the use of social media to follow, get information about, discuss, etc. public policy, social and/or political issues.

**Figure 42: Reported likelihood of sharing the advert on social media in Germany**



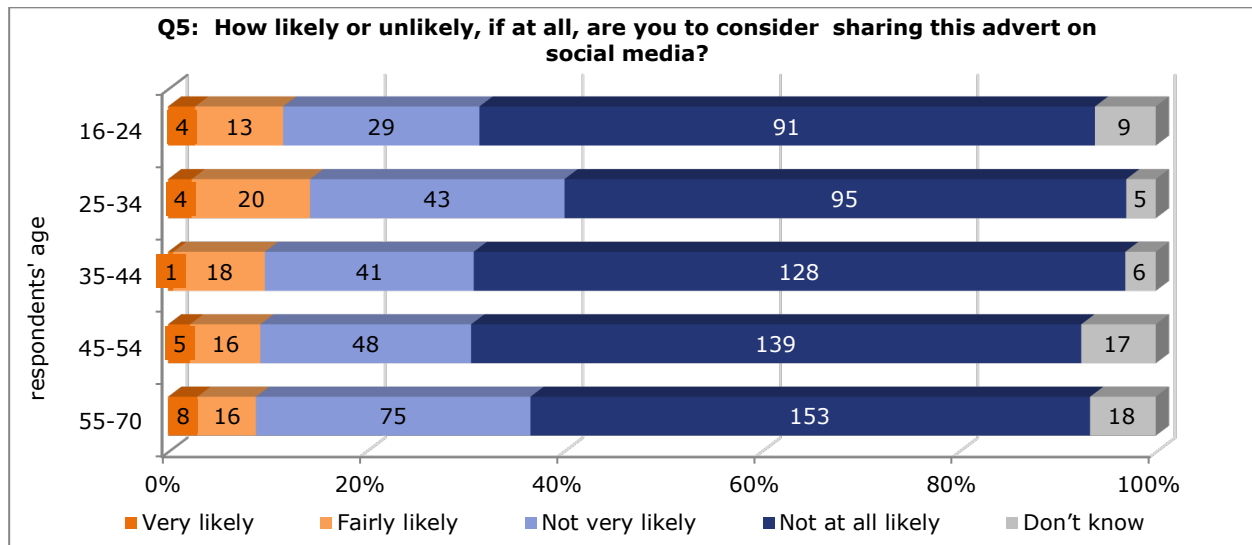
The majority of respondents (60%) indicated that it was highly unlikely that they would share the advert on social media. Furthermore, 24% of respondents indicated that it was not very likely that they would share the advert on social media. Conversely, respectively 2% and 8% of respondents indicated that it was very likely and fairly likely that they would share the advert on social media.

**Figure 43: Use of social media in Germany**



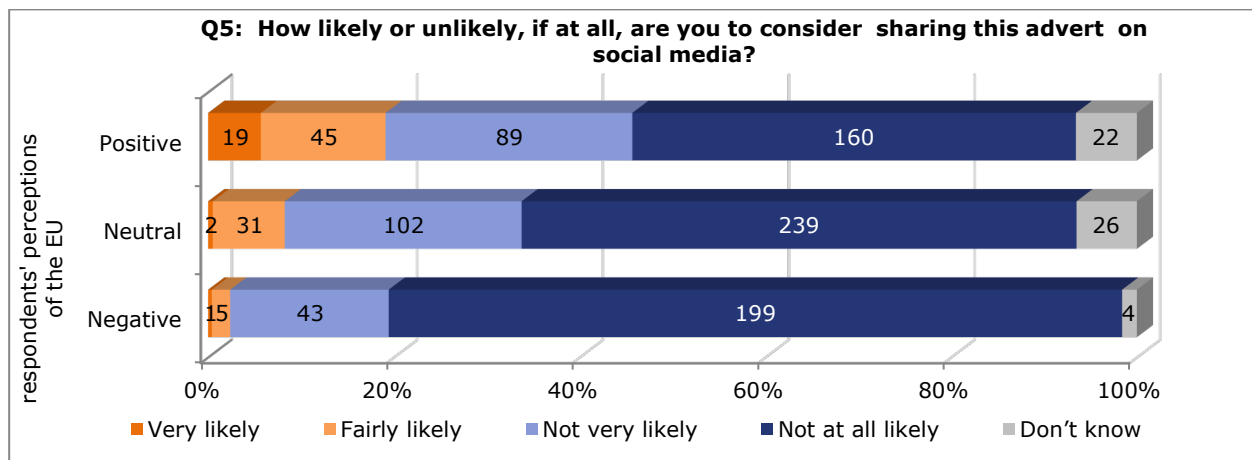
The survey revealed quite diverse results regarding the use of social media to follow socio-political issues. Less than a quarter of respondents make daily of social media for this purpose – 14% use social media several times a day and 19% use social media every day or almost every day – whereas 25% of respondents never use social media for this purpose.

**Figure 44: Reported likelihood of sharing the advert on social media in Germany, per age group**



A further breakdown of the results according to the age of respondents shows that 14% of respondents aged 25-34 would be likely to consider sharing this advert on social media, compared to respectively 12%, 10%, 9% and 9% for respondents aged 16-24, 35-44, 45-54, and 55-70. Younger generations are therefore more likely to share this advert on social media.

**Figure 45: Reported likelihood of sharing the advert on social media in Germany, per perceptions of the EU**



Finally, the results of the survey show that respectively 19%, 8% and 3% of respondents with a positive, negative and neutral opinion would be likely to share this advert on social media, whereas 74%, 96% and 85% of respondents indicated that it was unlikely that they would do so. The figure below also reveals that 6% of respondents with a positive image of the EU indicated they would very likely to consider sharing this advert on social media. This is a positive spin off from the campaign, which equates to free advertising. This would, however, only be the case for 1% of respondents with a neutral opinion.

## 3.2 Finland

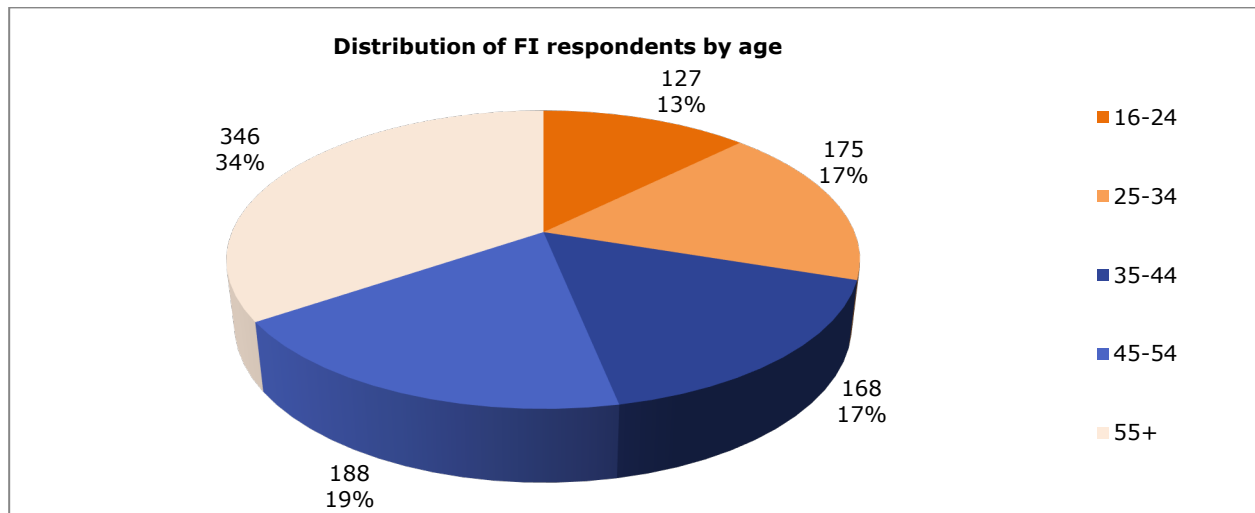
The omnibus survey in Finland took place on 13<sup>th</sup> February 2015, which was the last Friday of the campaign's broadcast on Finnish TV. In Finland, the campaign ran for a full month, from 15<sup>th</sup> January to 15<sup>th</sup> February.

### 3.2.1 Finnish respondents' profiles

The respondents who answered the survey (1004 responses) were almost equally divided in terms of gender (men - 501 responses, women - 503) and covered the age range of 16-70.

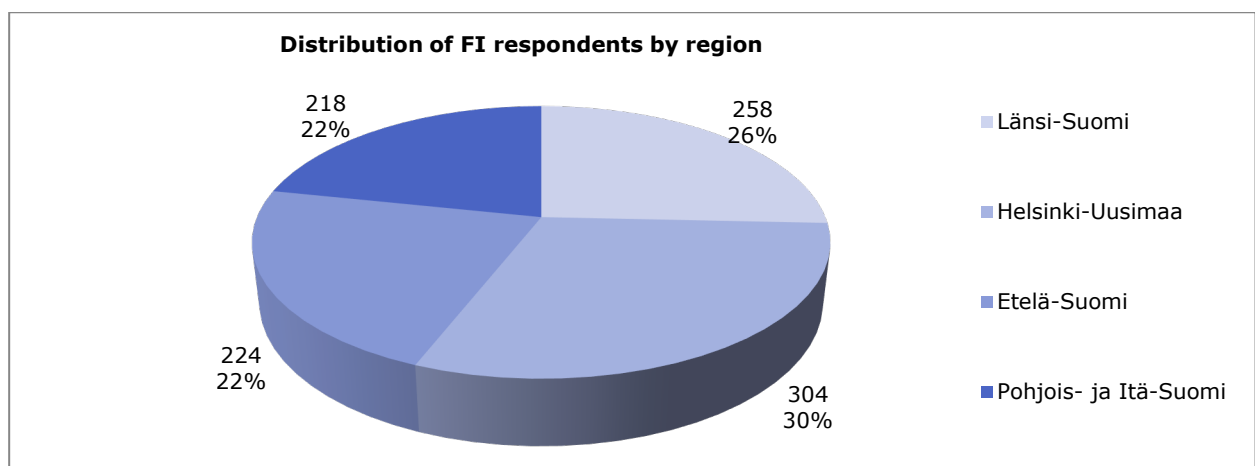
As visible from the figure below, 36% of the respondents were from the 35-54 age category, which was defined as the key audience of the campaign in Finland.

**Figure 46: Age distribution of Finnish respondents**



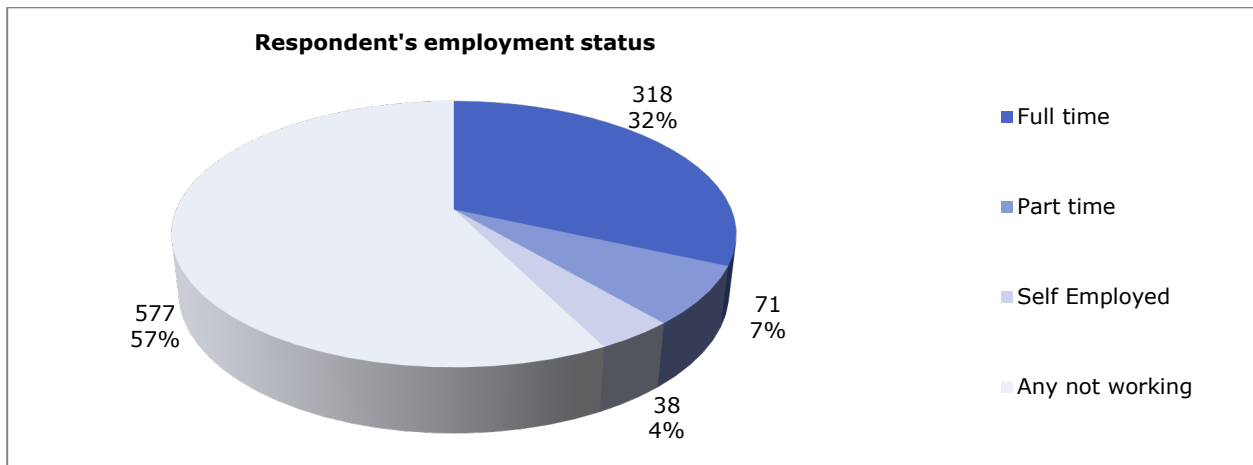
The figure below depicts the regional origins of the respondents, showing that their regional distribution was relatively even and that the responses can be treated as without any strong regional bias.

**Figure 47: Regional distribution of Finnish respondents**



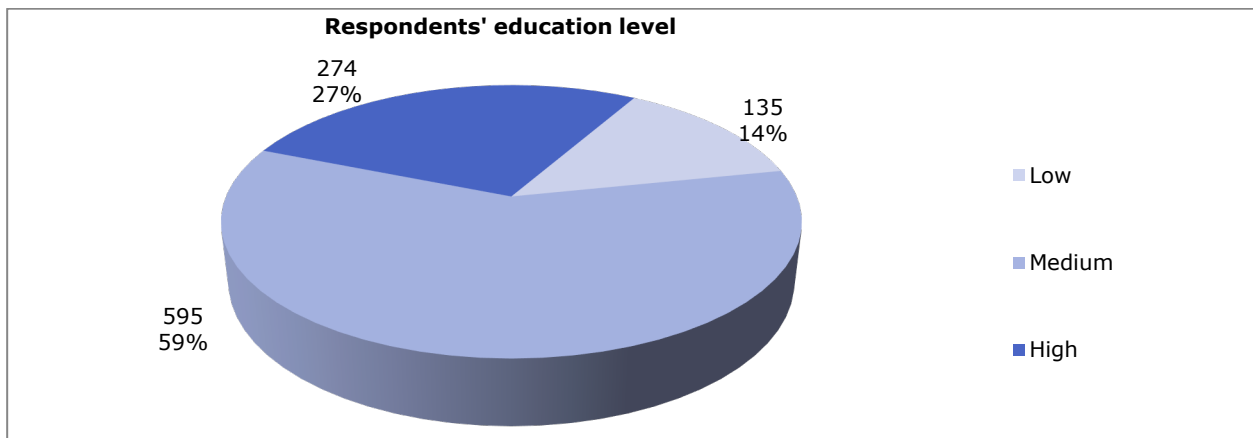


**Figure 48: Employment status of Finnish respondents**



As visible from the figure above, not working respondents (a category that also includes students) accounted for the largest share, with almost 60% of respondents indicating that this was their employment status. People in full-time employment represented the second largest share, accounting for approximately one-third, followed by small numbers of part-time employed and self-employed respondents, who accounted for respectively 7% and 4% of respondents. Data concerning numbers of people not working do not necessarily correspond to the status of being registered unemployed. Ten per cent of this sample is in the 15 – 24 age range, 15% are aged 55+, and this group is also likely to include those with full-time family care responsibilities.

**Figure 49: Education level of Finnish respondents**



Respondents who had completed upper secondary ('medium') education accounted for the largest share of respondents, with close to 60% indicating this education level. Respondents who had completed their university degrees ('higher education') represented the second largest share, accounting for 27% of respondents. The respondents who have only completed primary or lower-secondary school ('low') accounted for 14%.

### 3.2.2 Summary of key findings from Finland

A number of key findings can be drawn from the analysis of the omnibus survey results. These are:

- The views of respondents to this survey were equally divided between those who feel, positive, negative and neutral about the EU. Thirty-one per cent of respondents indicated that their image of the EU was 'neutral', 31% reported this to be positive, and 33% - negative. This is in slight contrast when compared with the results of the Eurobarometer survey (wave 3), in which 34% of Finnish respondents reported positive stance to the EU, 21% - neutral, and 41% negative.
- **Before seeing the advert (as a visual prompt), more people reported that they had seen adverts from the EU than didn't** (455 – 45% as opposed to 439 – 44%). The data suggests that the adverts had the best reach amongst the 25-34 age group, 53% remembered seeing an advert.
- In Finland, feeling positive about the EU influences the extent that the public noticed the EU adverts. **People who felt neutral about the EU were less likely to notice the advertisements.**
- Data from the unprompted recall question suggests that **the message was quite well received:** around 25% of the respondents were able to fairly accurately repeat the slogan of the campaign (EU working for you). **Over 50% of those who remembered the advertisements indicated that they understood that they ads were about the EU working for you.**
- The fact that there was only a small percentage change between unprompted and prompted recall suggests that **the advert did have some impact, at least in the short term, on those who saw it because they remembered the advertisement.**
- **Forty-three per cent of respondents indicated that they had seen the Help for the elderly (Kai from Pori) advert on TV.** Across all age groups between a quarter and a third of respondents had either not seen the adverts or were not sure if they had;
- The **majority of the respondents (57%) indicated that the advert makes no difference to their feelings about the EU.** However, at the same time **31% reported that it did make them feel positive.** The adverts were reported to have a negative impact on 10% of the respondents;
- **Most (59%) would not be likely to share the advert on social media,** and this was consistent regardless of the respondent's age. **A small proportion (10%) would be very or fairly likely to,** which is encouraging as it shows that the advert can generate some free advertising.

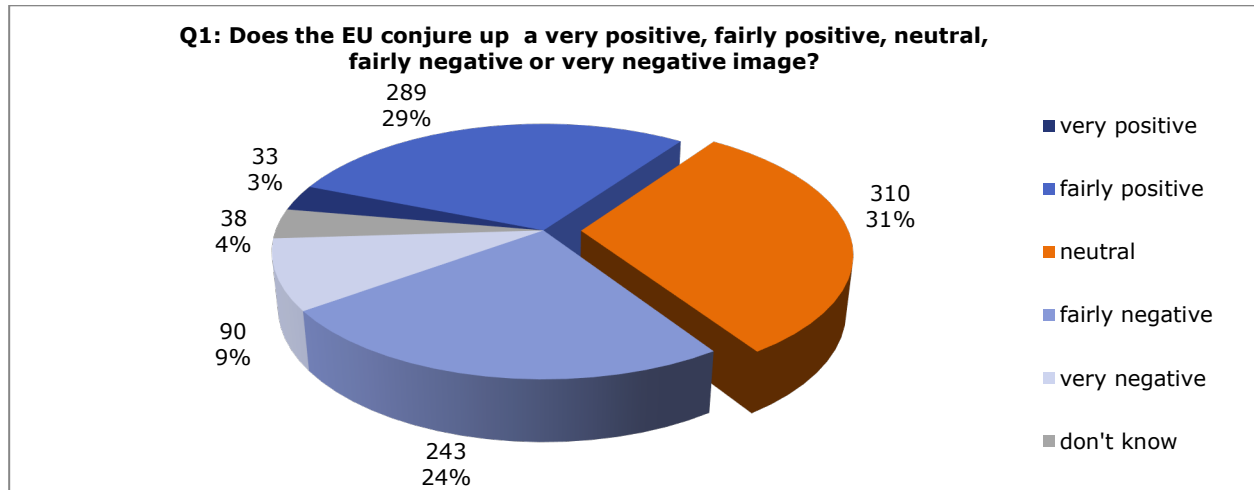
### 3.2.3 Omnibus survey results for Finland

#### Perceptions of the EU

The first survey question after the profiling questions, aimed to establish the respondents' overall perceptions of the EU in terms of the image it conjures up.

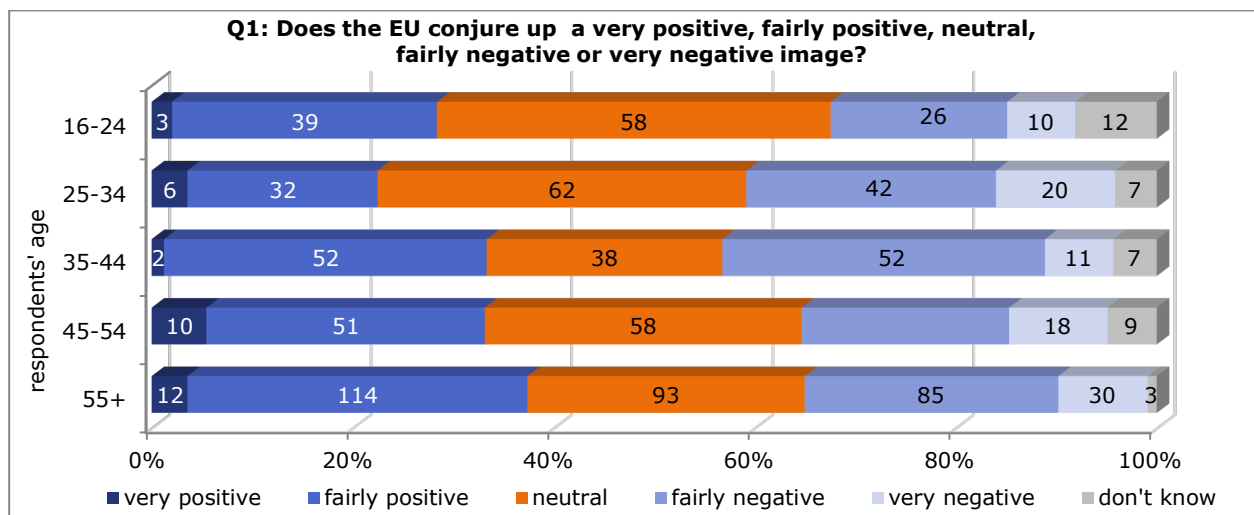
The volumes and proportions of the respective responses are presented in the figure overleaf.

**Figure 50: Image of the EU in Finland across all respondents**



The views of respondents to this survey were equally divided between those who feel positive, negative and neutral. Slightly more respondents (31%) indicated that their image of the EU was 'neutral' compared to fairly positive (29%) and fairly negative (24%). This is in slight contrast when compared with the results of the Eurobarometer survey (wave 3), in which 34% of Finnish respondents reported positive stance to the EU, 21% - neutral, and 41% negative.

**Figure 51: Image of the EU in Finland, per age group**



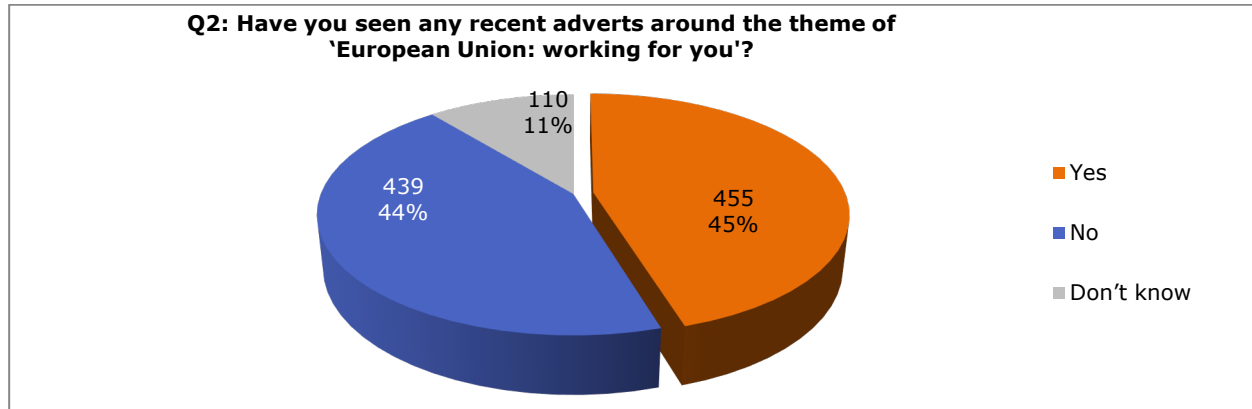
When looking at the perceptions of the EU among the respondents divided by age group, as depicted in the figure below, it can be seen that the older age groups held generally a more positive impression of the EU, with 38% of respondents older than 55 having a 'very positive' or 'fairly positive' image of the EU. While in the 25-34 group, the proportion, who

feel very or fairly positive is only 22%. At the same time, the highest percentage of 'neutrals' (39%) was found in the youngest group (16-24 year olds) as well as in the 25-34 age group. This raises questions with regards to whether younger people are less well informed about the EU or generally less interested and politically more apathetic in Finland.

### Unprompted recall of adverts

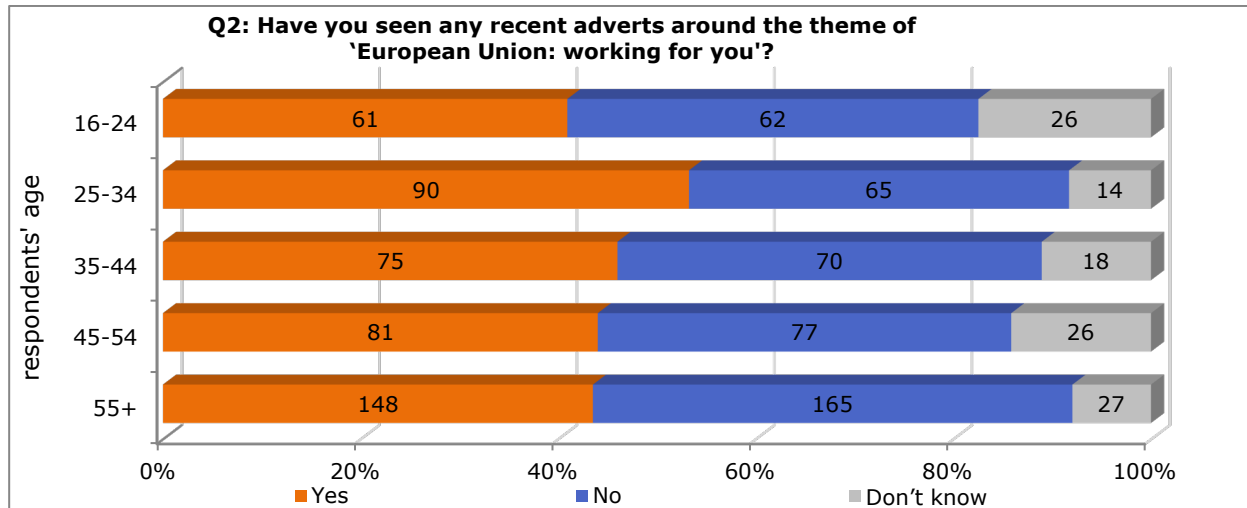
The figure below depicts the proportions of the visually unprompted recall of the Pilot among the total number of respondents.

**Figure 52: Visually unprompted recall of the adverts in Finland**



Interestingly, the proportions of respondents who reported to have seen the adverts was almost equal to the ones who reported not to have seen them (45% compared to 44%). Only 11% of the survey participants indicated they don't know if they have seen such adverts.

**Figure 53: Visually unprompted recall of the adverts in Finland, per age group**

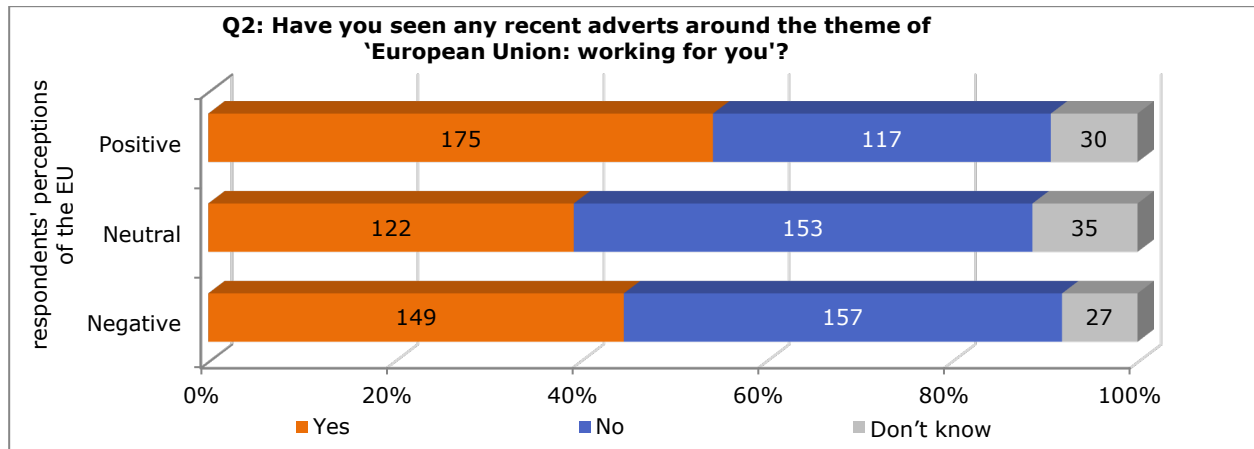


When broken down by age group, it can be seen that the proportion of respondents who indicated having seen the adverts was similar for most age groups with one exception. Fifty-three per cent of the respondents aged 25-34 reported to have seen the ads, followed by 46% of the 35-44 year olds, 44% in the 45-54 group, 42% among the group aged over 55, and 41% in the youngest.

The oldest respondents (i.e. aged over 55) most often reported that they had not seen the advert (51%). Not having seen the advert was also indicated by 43% of the respondents

aged 35-44 and 42% in age groups 16-24 and 45-54. The relatively lowest percentage of respondents who have not seen the advert (39%) belonged to the group aged 35-44.

**Figure 54: Visually unprompted recall of the adverts in Finland, per perceptions of the EU**



Out of the respondents who reported net positive image of the EU (i.e. *very positive* and *fairly positive* combined), over a half (54%) stated that they have seen recent adverts on the topic. 39% of the 'neutrals' believed to have seen it, which is lowest of the three stances, as 45% of 'negatives' reported to have seen the adverts. The 'neutrals' were also the group which reported the highest ratio of not having seen the advert (49% compared to 36% of 'positives' and 47% of 'negatives'). Although it is not possible to confirm from the data, it seems logical that people who feel ambivalent / neutral about the EU may not pay attention to an advert about the EU and therefore were less likely to recall the advertisements. As the adverts seem to have been more recalled by those who feel positive about the EU, it could suggest that the adverts better corresponded to this group rather than meeting the needs of people who feel neutral.

The survey participants who indicated that they have seen the advert were asked two **additional open questions**, namely

- What did you see/hear in the advertising?
- What else did the advertising tell you?

297 respondents gave answers to the open questions.

The main channel reported was the TV: around 16% of the respondents specifically mentioned seeing the adverts on TV whereas each of the other channels (radio, print, social media, online banners and campaign website) were only mentioned specifically few times. Less than 5% of the respondents specifically referred to a wrong campaign/were talking about a different online or TV activity.

The message seems to have been quite well received: around 25% of the respondents were able to fairly accurately repeat the slogan of the campaign (EU working for you). The overall message seemed to be clear for over 50% of the respondents. Another message that was quoted often was that EU is *creating jobs* or *increasing employment* (with around 20 mentions of jobs for young people specifically); around 29% of people mentioned employment or jobs as part of their response in some way.

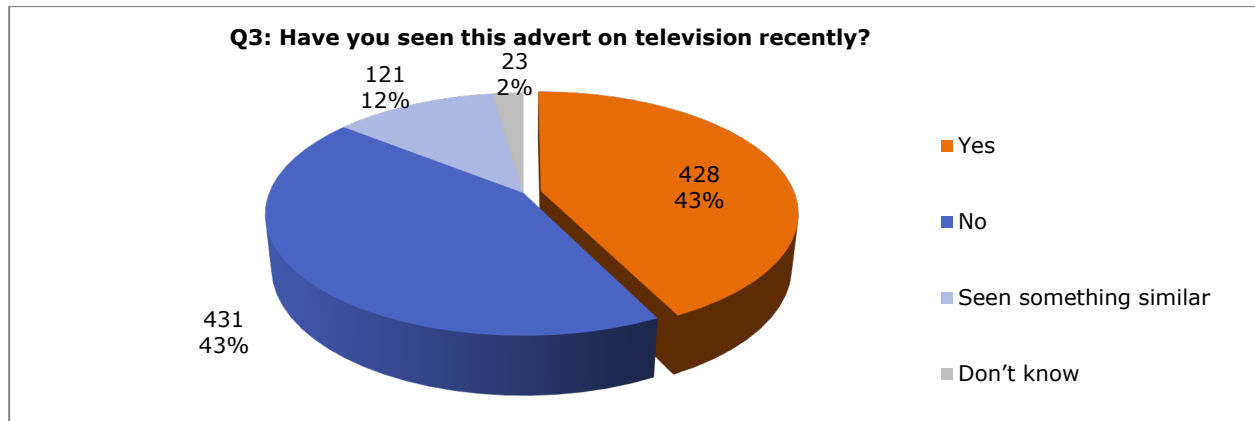
People mentioned all three adverts in their responses: the Finnish theme (working for the elderly) got 41 mentions, the Portuguese one (green jobs) 24 and the German (online safety) -10. There seemed to be a link between people who had seen the Portuguese advert and job creation message.

Around 8% of the responses had negative connotations. The message had been clear but there was cynicism about it aka EU is 'supposedly' working for you with only couple mentions that the campaign would be waste of funds and time.

### Prompted recall of adverts

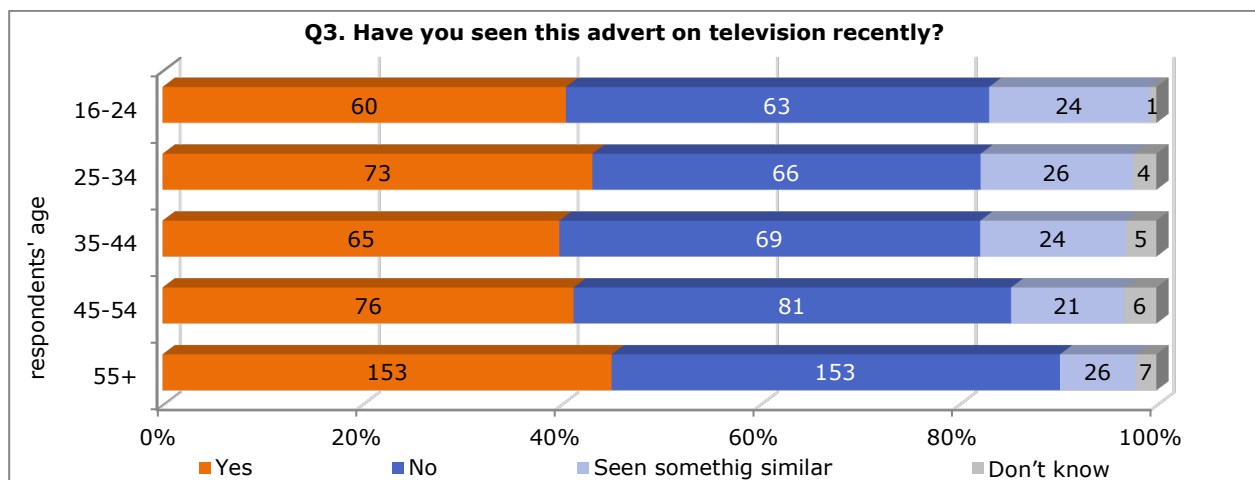
The respondents were shown the national video advert on the theme of the elderly (*Kai from Pori*).

Figure 55: Visually prompted recall of the adverts in Finland



Interestingly, when shown the advert, the proportion of respondents who recalled seeing the advert on television decreased by 2% (from the 45% without the prompt, to 43%). At the same time, the proportion of respondents who reported not to have seen it also decreased, by 1% (from 44% to 43%). Twelve per cent of respondents believed that they had seen "something similar" and the number of those choosing the option "don't know" was only 2%. The fact that there was only a small percentage change between unprompted and prompted recall suggests that the advert did have some impact on those who saw it because they remembered seeing it. Also, if we consider that those who had seen something similar had actually seen one or other of the two adverts not seen in this survey, the results would suggest that more people saw the adverts than didn't.

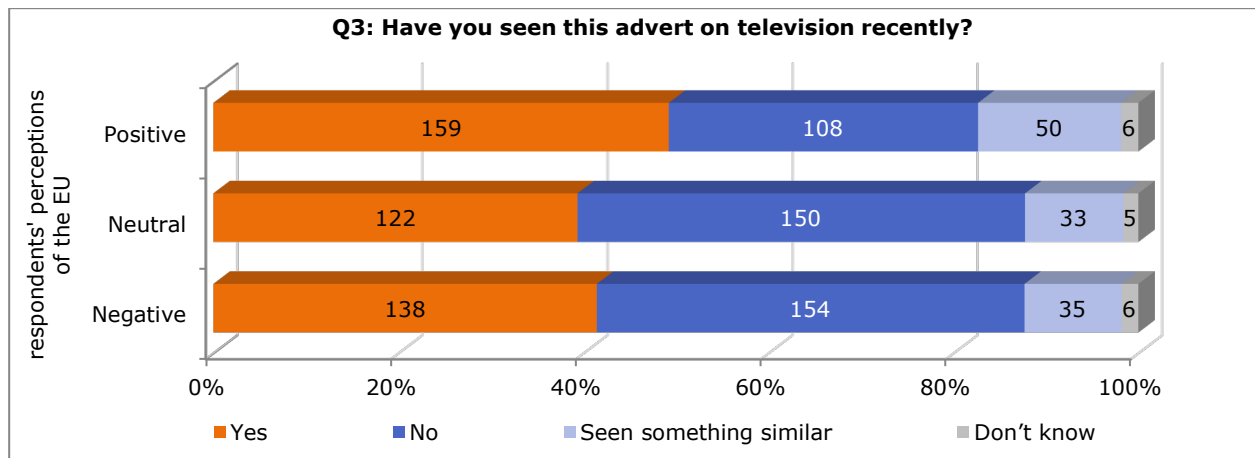
Figure 56: Visually prompted recall of the adverts in Finland, per age group



A breakdown of the results according to the age of respondents shows a similar picture across all age groups. The proportion of respondents who have seen the advert were almost

equal to the ones who have not. In all cases, between a quarter and a third of respondents had either not seen the adverts or were not sure if they had.

**Figure 57: Visually prompted recall of the adverts in Finland, per perceptions of the EU**

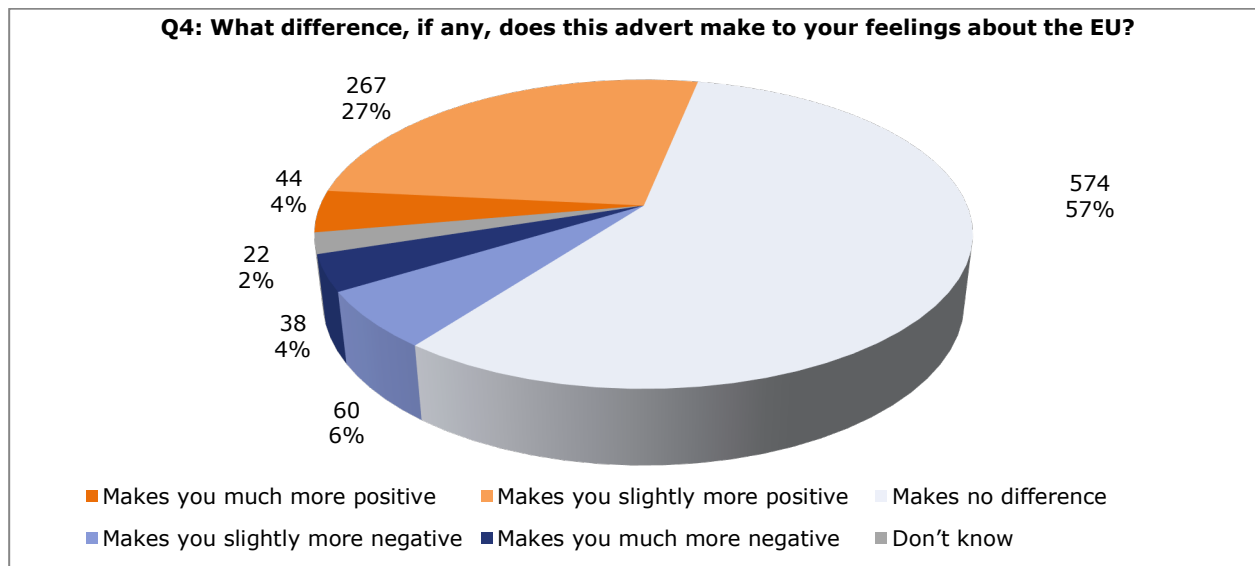


The results seem to suggest that in Finland those who are more positively pre-disposed to the EU are more likely to notice it than those who feel neutral about it. Forty-nine per cent of those with a positive view of the EU reported having seen the advert, compared to 41% and 39% of those with a negative and neutral stance, respectively.

**Advert's impact on feelings towards the EU**

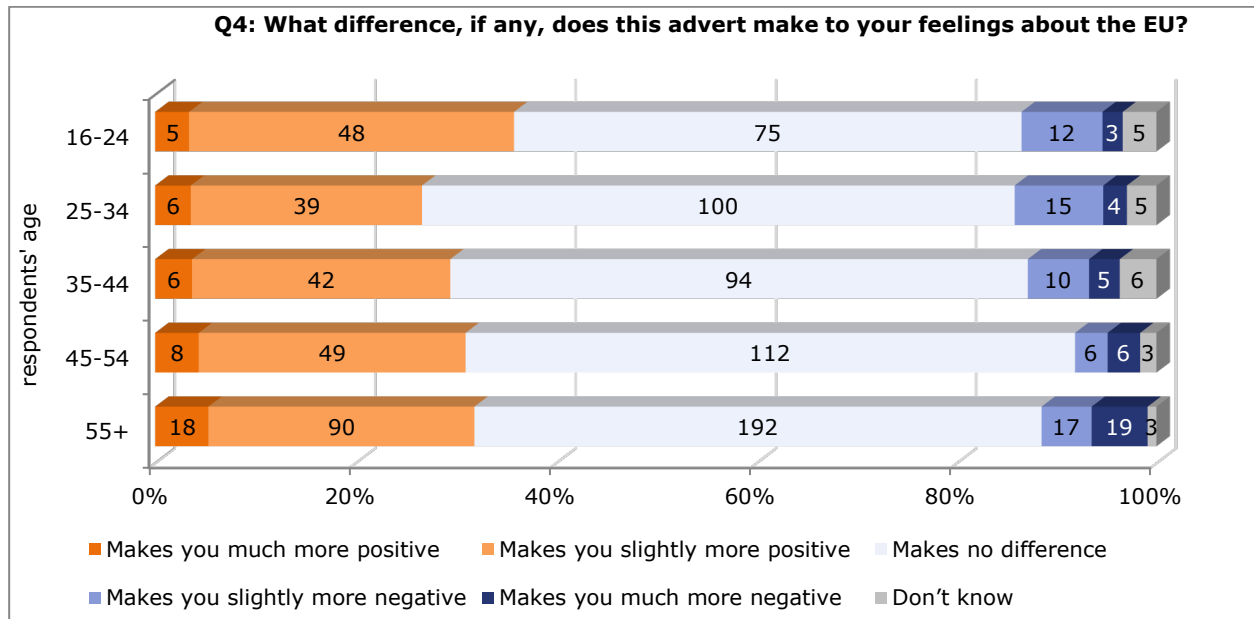
The next question required the survey participants to rate to what extent, if any, the advert they had just seen made to their feelings about the EU.

**Figure 58: Advert's impact on feelings towards the EU in Finland**



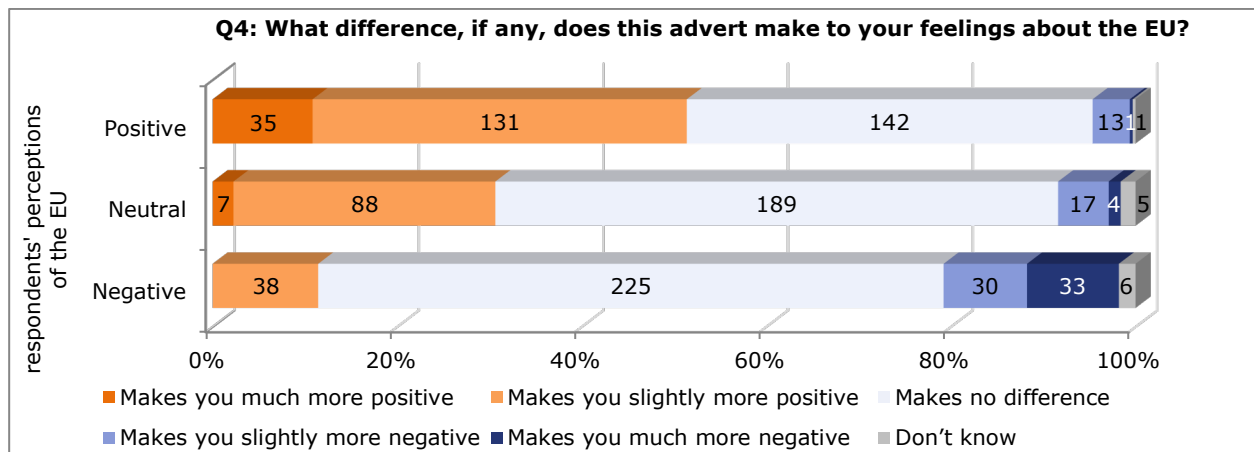
The majority of the respondents (57%) indicated that the advert makes no difference to their feelings about the EU. However, at the same time 31% reported that it did make them feel positive to an extent (4%- much more positive, 27% slightly more positive). The adverts were reported to have a negative impact on 10% of the respondents (6% - slightly more negative, 4%-much more negative). This suggests that the advert tended to either have no impact or a positive impact for circa one in three people and only in a small number of cases made people feel more negative. Suggesting that the campaign is generally more positive than negative, which is reassuring as some advertising campaigns can backfire.

**Figure 59: Advert's impact on feelings towards the EU in Finland, per age group**



The analysis of responses per age group depicted above suggests that the advertisements did not have significant impact for over a half of respondents in all age groups (51%, 59%, 58%, 61% and 58%). The campaign was reported to have the most positive impact on changing the feelings of the youngest age group (35% of net positive changes reported, compared to approx. 30% across the older groups). In none of the age groups more than 12% reported to feel more negative about the EU as the result of the advert.

**Figure 60: Advert's impact on feelings towards the EU in Finland, per perceptions of the EU**



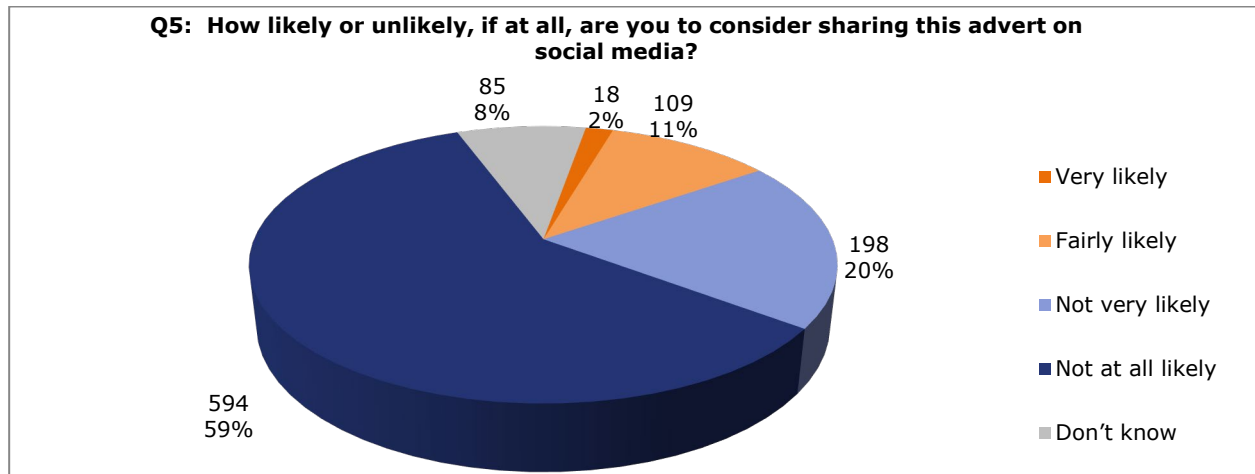
As highlighted in Figure 34, we know that for most Finnish respondents the advert did not change how they felt about the EU. Although for circa one in three respondents it did have an impact. The figure above reveals that just over half of respondents who already felt positive about the EU (52%) felt even more positive about the EU. Meanwhile the advert had an impact on circa one in three respondents who feel neutral about the EU (30%). It is also encouraging to note that that it also managed to make a small per cent of those who feel most negative about the EU feel slightly more positive (12%).



### Advert and the social media

The respondents were enquired how likely they are to consider sharing the shown advert on social media, and about their general social media habits.

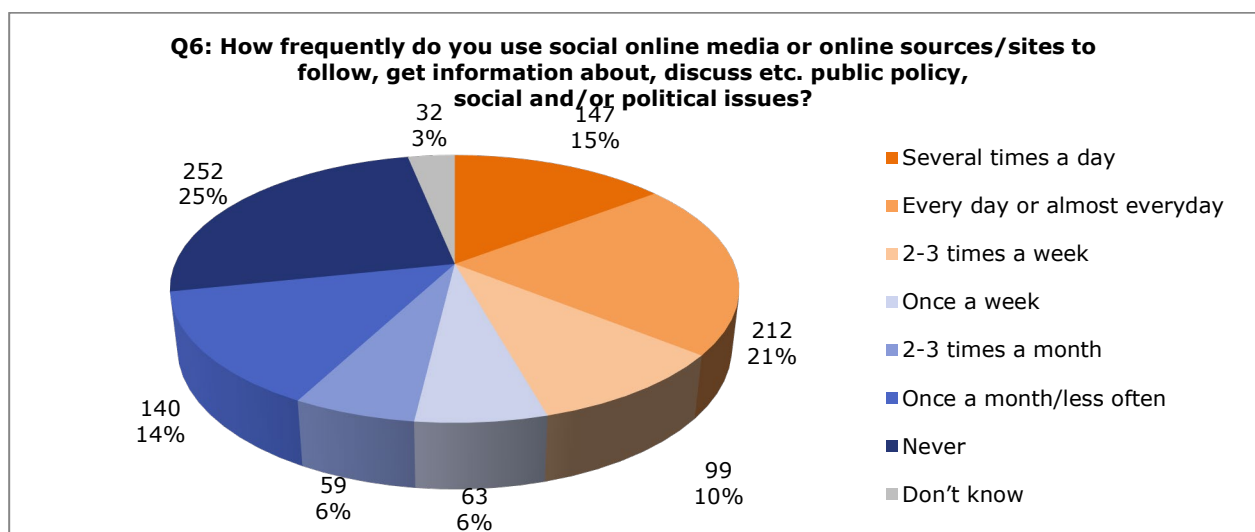
**Figure 61: Reported likelihood of sharing the advert on social media in Finland**



From our evaluations of other EC campaigns, it seemed unlikely that people would share the video clips on social media, it is in fact tricky to get people to do this. The figure above confirms this hypothesis and demonstrates that a majority (59%) would not at all be likely to share the advert on social media, and one-fifth (20%) are not very likely to share it. However, here is it perhaps more useful to focus on the positives. It is encouraging to note that circa 1 in 10 respondents would be likely to share the ad on social media, which is effectively free advertising for the Commission.

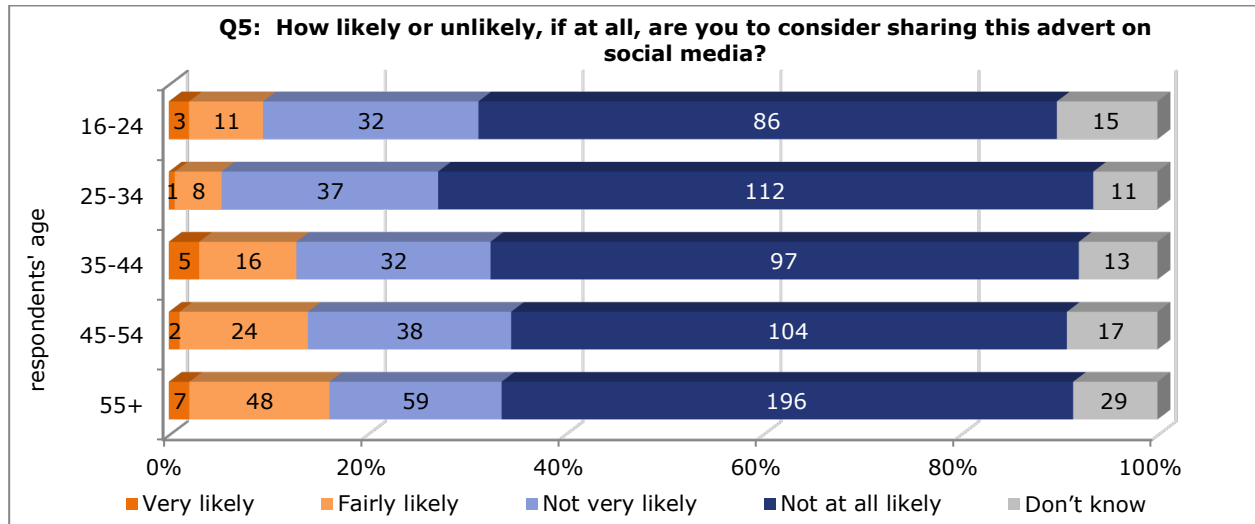
To put those findings in context, the figure below presents the reported use of social and online media to follow, get information about and discuss public policy, social and/or political issues.

**Figure 62: Use of social media in Finland**



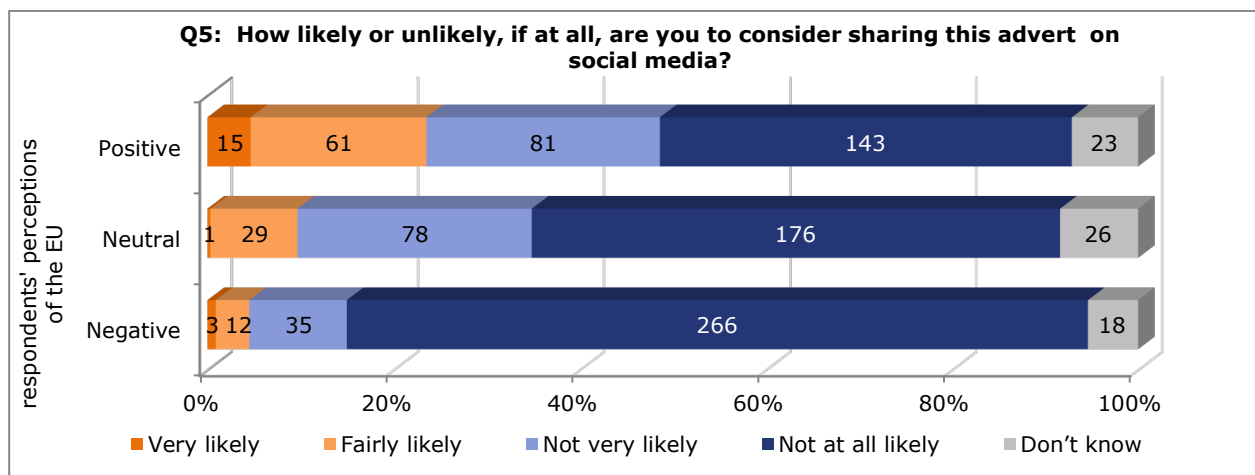
Forty-six per cent of respondents reported using the online and social media for that purpose 2-3 times a week or more often; a proportion almost identical to the amount of respondents who indicated that they use such media 2-3 times a month or less, including never (45%).

**Figure 63: Reported likelihood of sharing the advert on social media in Finland, per age group**



A breakdown of the results of respondents' reported likelihood to share the advert according to their age shows that regardless of age, a definite majority of the respondents are not at all likely to consider sharing this advert on social media (58%, 66%, 60%, 56% and 58% across the respective age groups). Perhaps unsurprisingly, given the theme of the advert, the likelihood of considering sharing the advert, although still relatively low, does increase with age of the respondents, with only 10% of 16-24 year olds considering to share it, 6% of the 25-34 year olds, 13% in the age group 35-44, 14% among 45-54 year olds, and 16% of the respondents over 55.

**Figure 64: Reported likelihood of sharing the advert on social media in Finland, per perceptions of the EU**



When plotted against the participant's views of the EU, the results of the survey show that in all of the cases, a significant number of respondents would not at all be likely to consider sharing the advert on social media (44%, 57% and 80% in the positive, neutral and negative groups, respectively). When including the responses of 'not very likely', the proportions become even starker, with 69% of the positives, 82% of neutrals and 90% of negatives being not likely ('at all' or 'not very') to share the advert.



### 3.3 Latvia

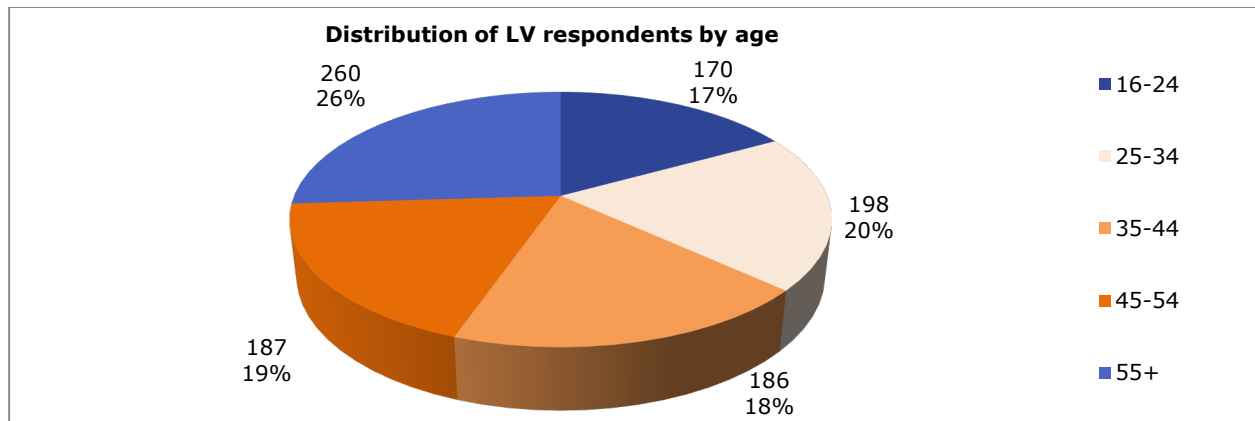
The omnibus survey in Latvia was carried out on 6<sup>th</sup> of March, which was towards the end of the second wave of television advertising in Latvia.

#### 3.3.1 Latvia respondents' profiles

This section provides a description of the profiles of the 1001 respondents to the survey in Latvia, according to their gender; age; region of residence; employment status; and education level.

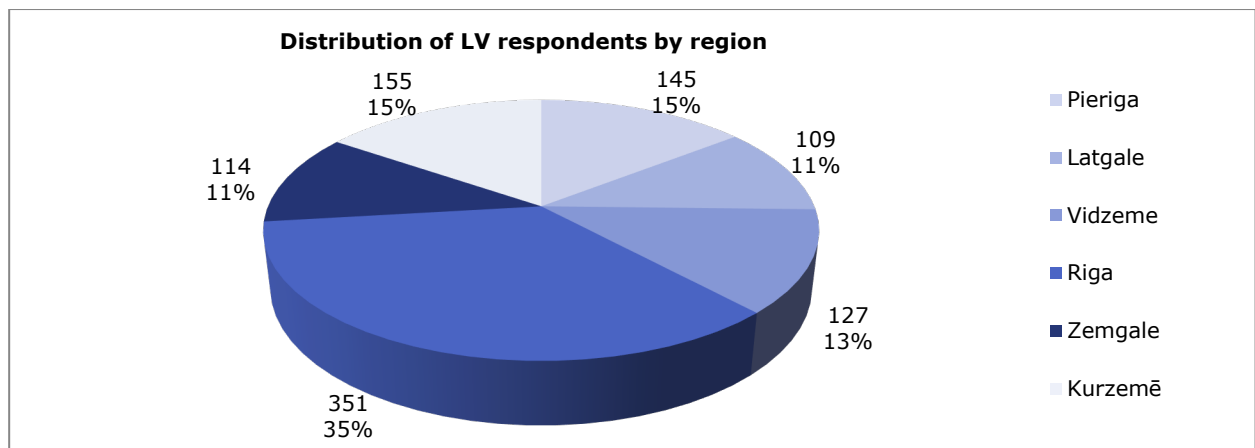
In this survey 42% of respondents were men, and 58% of respondents were women.

**Figure 65: Age distribution of Latvian respondents**



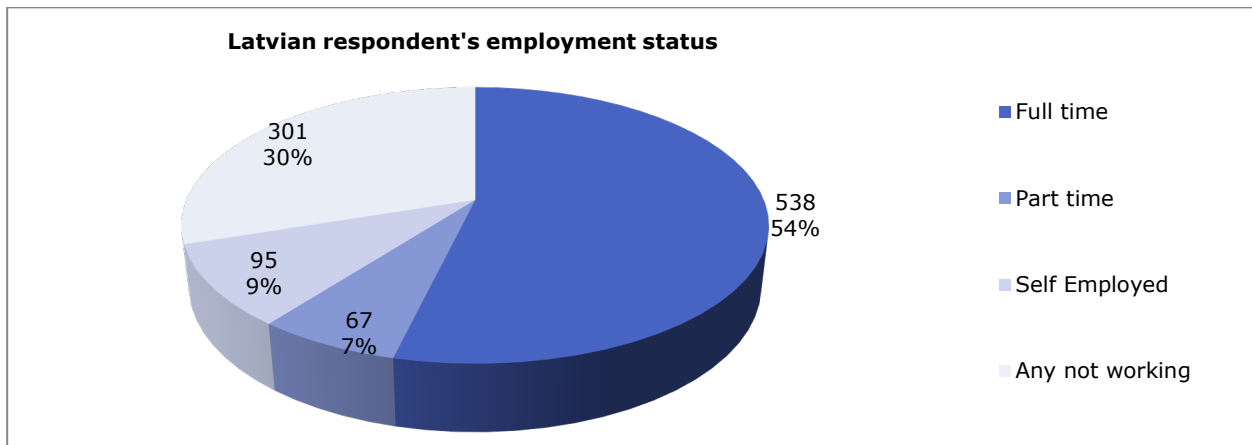
Respondents aged 55-70 accounted for the largest share of respondents, with 26% of respondents indicating that they belong to this age category, as shown in the figure above. Respondents aged 25-34 represented the second largest group, accounting for 20% of respondents, followed by respondents aged 45-54, 35-44, and 16-24, which accounted for respectively 19%, 18% and 17% of respondents. Respondents within the target age group of the pilot, which is 25-54, therefore, accounted for 57% of respondents.

**Figure 66: Regional distribution of Latvian respondents**



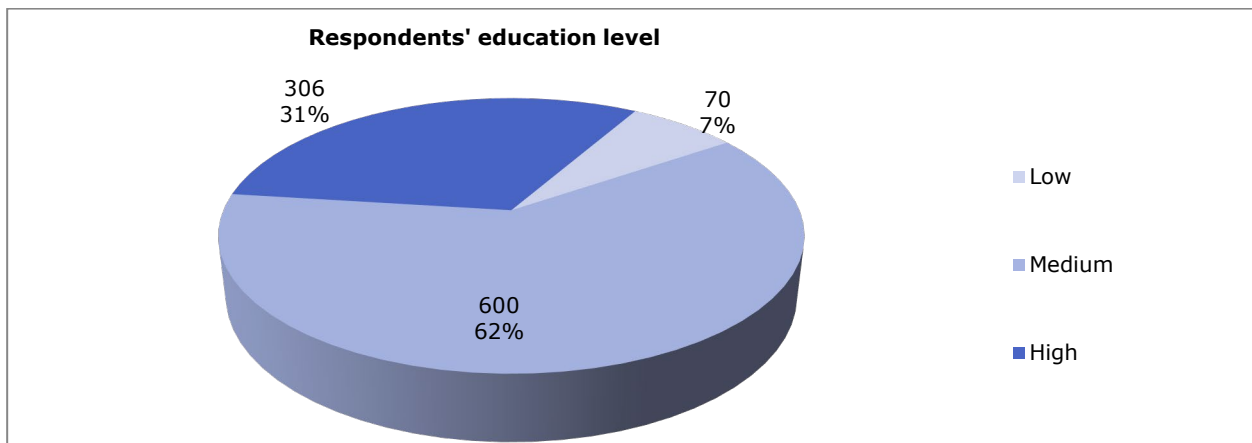
Respondents from the Riga region represented the largest share of respondents, accounting for 35% of total respondents, followed by a relatively even spread of respondents from Kurzemē and Pieriga regions (both 15%); Vidzeme (13%); Latgale and Zemgale (both 11%).

**Figure 67: Employment status of Latvian respondents**



The figure above shows that the number of survey respondents who are currently working full time accounts for 54% of respondents. The second biggest share (30%) consists of people who are currently not working, which includes students, family carers, the retired and the unemployed. Self-employed respondents and those working part-time form 9% and 7% of the pool of respondents, respectively.

**Figure 68: Education level of Latvian respondents**



As shown in the figure above, respondents who had completed a medium level of education (upper level of secondary education) accounted for the largest share of respondents (62%). Respondents who had completed a higher education level (a university degree) represented the second largest share, accounting for 31%, followed by respondents with a low education level (primary and lower level of secondary education), who accounted for 7% of the total.

### 3.3.2 Summary of key results for Latvia

A number of key findings can be drawn from the survey. These are:

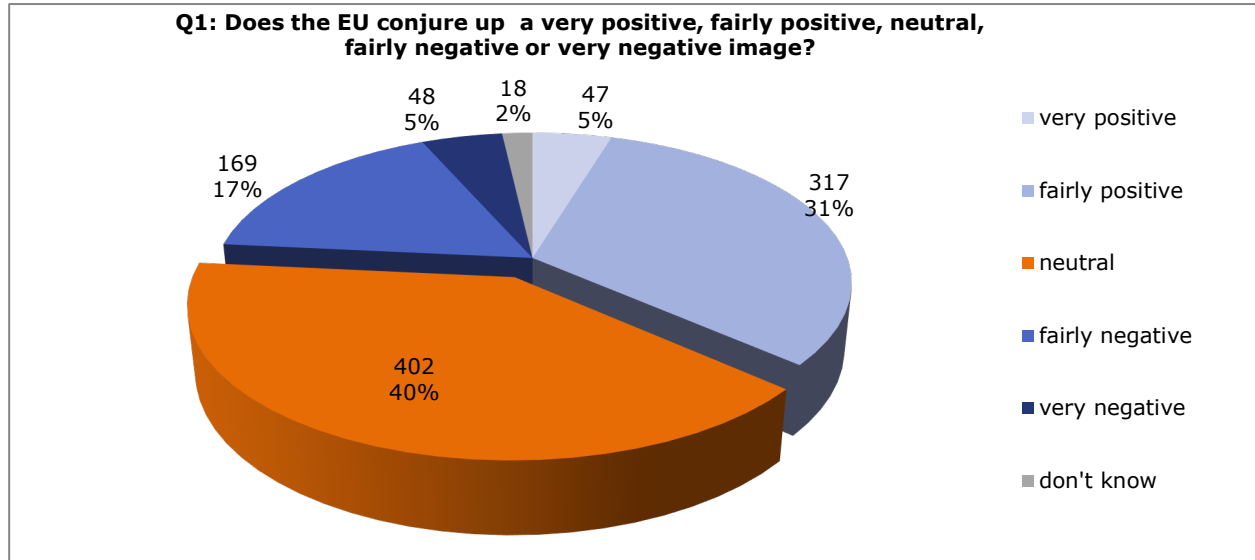
- **The EU conjures up a neutral image for 40% of Latvian respondents;** people aged 35-44 are most neutral and those aged 55+ are proportionately the most positive and negative.
- **Unprompted, 56% of all respondents indicated that they had seen adverts** around the theme "EU: is working for you". A breakdown of the results according to the age of respondents shows **similar levels of unprompted recall across the age groups. Respondents with a positive image** of the EU were the ones that reported seeing the adverts most, with as many as 68% indicating that this had been the case.
- **Over 60% of respondents indicated that they had seen the Youth (*Karina from Daugavpils*) advert on TV,** and overall, more of the older age groups 35+ saw the advert than the younger age groups. The consistency of these results with the results of the unprompted visual recall question, suggests that **those who saw the advert in Latvia remembered it in the short term.**
- Having seen the advert during the survey, **most respondents (59%) indicated that it made no difference** to their feelings about the EU, however **30% indicated that the advert made them feel more positive;**
- When comparing different age ranges, the advert had a more **positive impact on younger respondents' feelings** (16-24 and 24-34) than older generations. Between 38% and 32% of respondents in the 16-24 and 24-34 age group indicated it made them feel more positive.
- Most respondents wouldn't share the advert on social media. **However, 8% of respondents were willing to share the advert on social media and of these 2% were very likely to do so** To put this in context, 17% of respondents use social media to follow, get information about, discuss, etc. public policy, social and/or political issues several times a day.

### 3.3.3 Omnibus survey results for Latvia

#### Perceptions of the EU

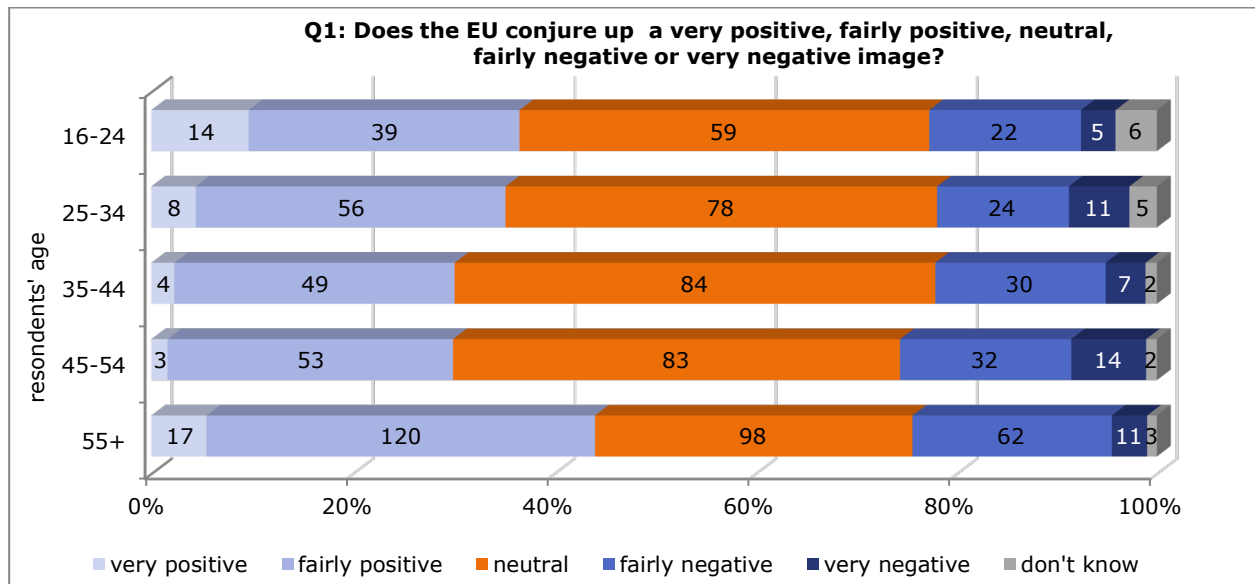
The first question asked about respondents' perceptions to the EU.

Figure 69: Image of the EU in Latvia across all respondents



As shown above, the **EU conjures up a neutral image for 40% of Latvian respondents**; 31% hold a fairly positive view and 17% a fairly negative. Overall, the EU conjures up a positive image for 36% of respondents, and a negative image for 22%.

Figure 70: Image of the EU in Latvia, per age group

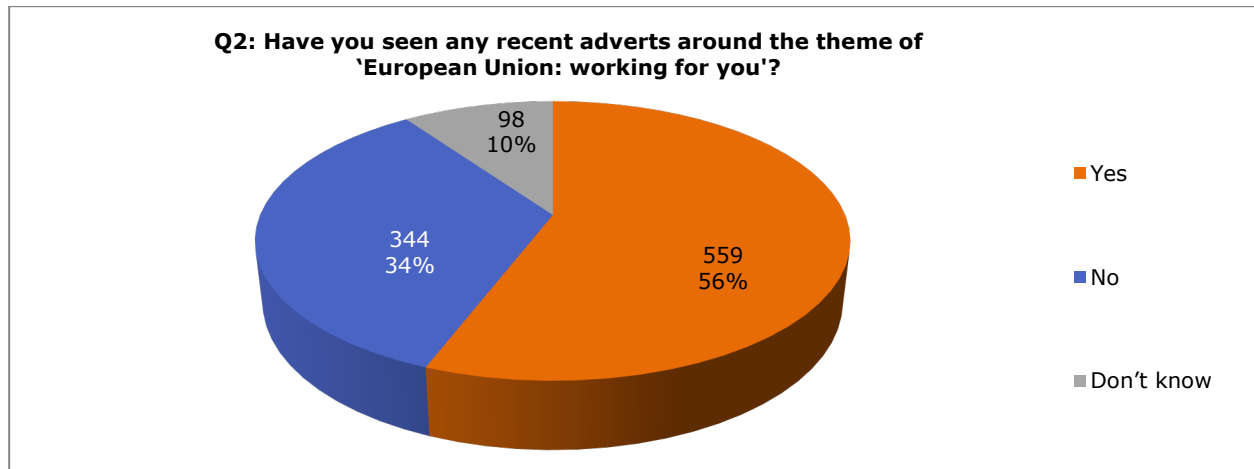


A breakdown of these results by age category, shows that people aged 35-44 are most neutral and those aged 55+ are proportionately the most positive and negative. Forty-eight per cent of respondents aged 35-44 have a neutral image of the EU, followed by 45% of respondents aged 45-54, 43% of respondents aged 25-34, 40% of those aged 16-24, and 32% of respondents aged 55-70. For the older age group (aged 55-70): 47% have an overall positive view, compared to 37% of 16-24 year olds, 35% of 25-34 year olds, and 30% of participants aged 35-44 and 45-54.

### Unprompted recall of adverts

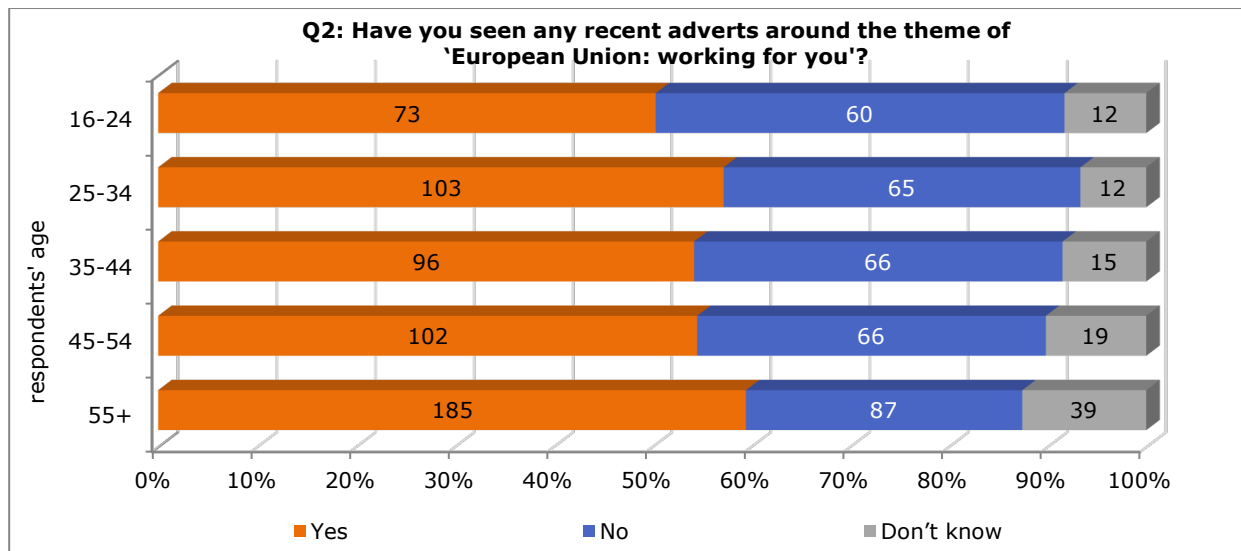
The second question asked whether participants recalled the adverts.

**Figure 71: Visually unprompted recall of the adverts in Latvia**



The figure above reveals that as much as **56% of respondents thought that they had seen recent adverts** around the theme of 'European Union: working for you'. 35% of respondents indicated that they had not seen any such adverts, and 10% indicated that they did not know.

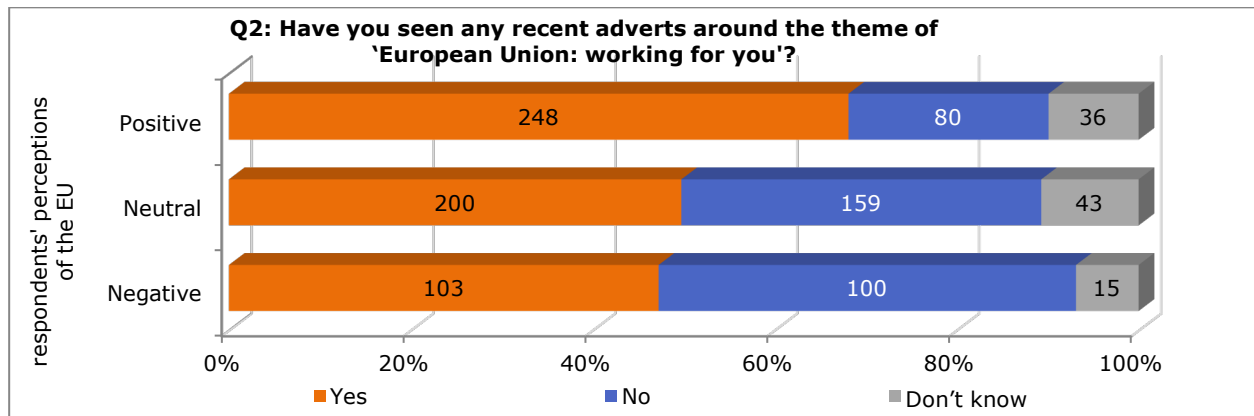
**Figure 72: Visually unprompted recall of the adverts in Latvia, per age group**



A further breakdown of the results according to the age of respondents shows **similar levels of unprompted recall across the age groups**, ranging from 58% in the group 55-70; 57% among the 25-35 year olds, 55% among the respondents aged 35-44 and 45-54, to 50% in the youngest group. The youngest group had the highest proportion reporting that they had not seen the advert (41%), compared to the relatively even proportions in the other groups: 37% in the 35-44 group, 36% in the 25-34 group, 35% among the 45-54 year olds, and 30% in the oldest group. However, the oldest respondents were also more likely to feel unsure as to whether or not they had seen the adverts; 13% of them indicated they "didn't know" whether they had seen it.



**Figure 73: Visually unprompted recall of the adverts in Latvia, per perceptions of the EU**



The figure above reveals that **respondents with a positive image** of the EU were the ones that remembered seeing the adverts most, with as many as 68% indicating that this had been the case, in comparison with 50% of respondents with neutral view and 47% of respondents whose view on the EU was negative. Only 22% of the respondents with a positive image of the EU indicated that they had not seen the adverts, as opposed to 46% of respondents with a negative image, and 40% for respondents holding a neutral view.

The survey participants who indicated that they had seen the advert were asked two **additional open questions**, namely:

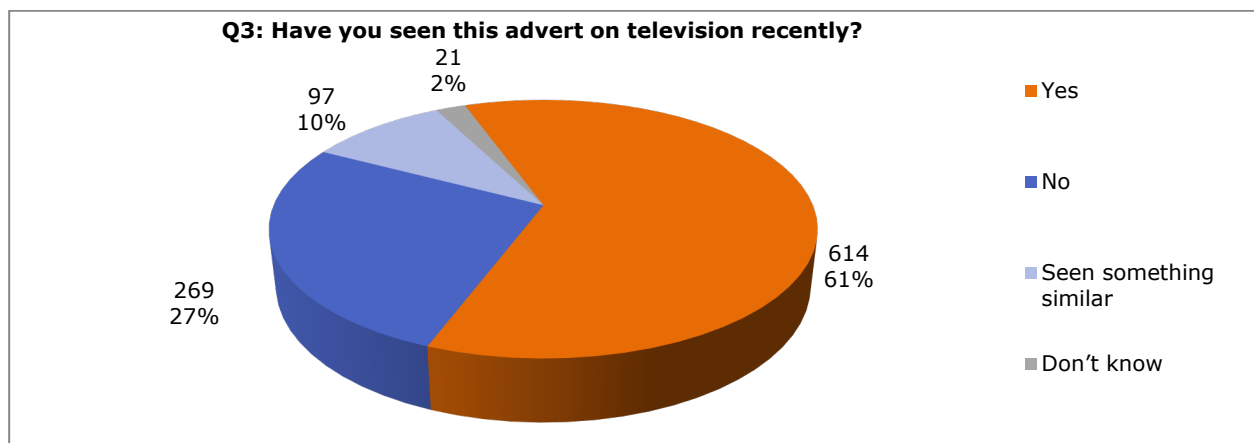
- What did you see/hear in the advertising?
- What else did the advertising tell you?

Majority of the respondents seemed to have remembered the adverts rather well, either quoting the campaign slogan or describing the adverts' themes (ERASMUS+, helping SMEs, job opportunities). This helps to ascertain that the **results of unprompted recall did relate to the actual campaign to a good extent**. For respondents that indicated that they had seen the adverts, most viewed them positively and associated them with notions such as greater opportunities, funding for Latvia's development and that the "EU is working in our favour". For the ones that viewed them negatively, the adverts were associated with notions that the support does not come with no strings attached.

### **Prompted recall of adverts**

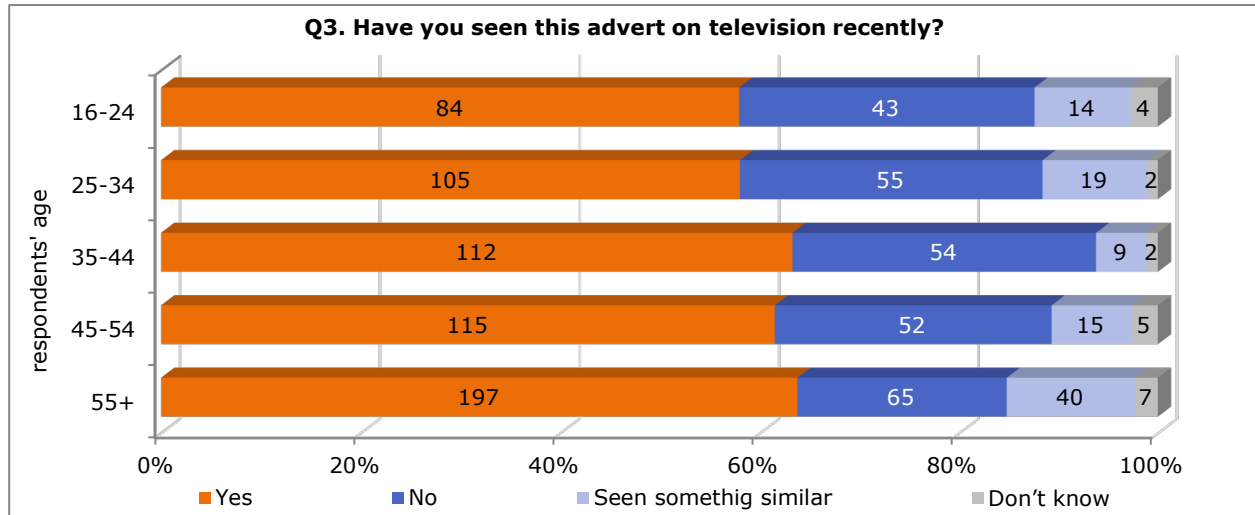
The third question asked whether participants had seen the Youth (Karina from Daugavpils) advert on television.

**Figure 74: Visually prompted recall of the adverts in Latvia**



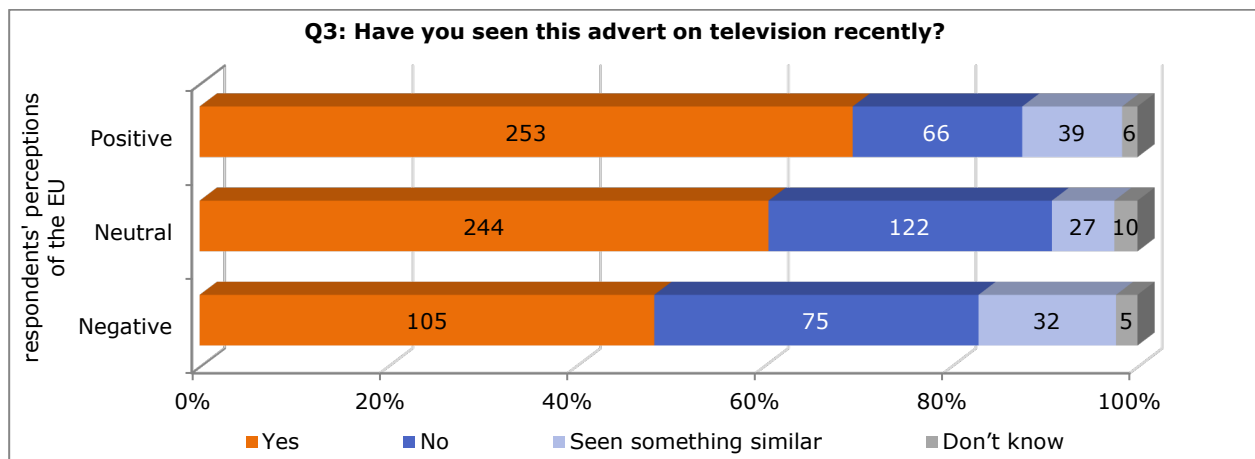
The figure above reveals that a majority of respondents (**61%**) indicated that they had **seen the advert**. Less than one-third (27%) reported not to have seen it, and 10% indicated that they have seen something similar. The level of consistency of this response with unprompted recall seems to confirm that those who saw the advert did remember it.

**Figure 75: Visually prompted recall of the adverts in Latvia, per age group**



Overall, **more of the older age groups 35+ saw the advert than the younger age groups** (16 – 34). A further breakdown of the results according to the age of respondents shows that the older respondents aged 55-70 were proportionately the most likely to have seen the adverts on television with 65% indicating that they saw the ad or something similar. The greatest proportion of those who reported not having seen the advert (31%) belonged to the age group 35-44.

**Figure 76: Visually prompted recall of the adverts in Latvia, per perceptions of the EU**

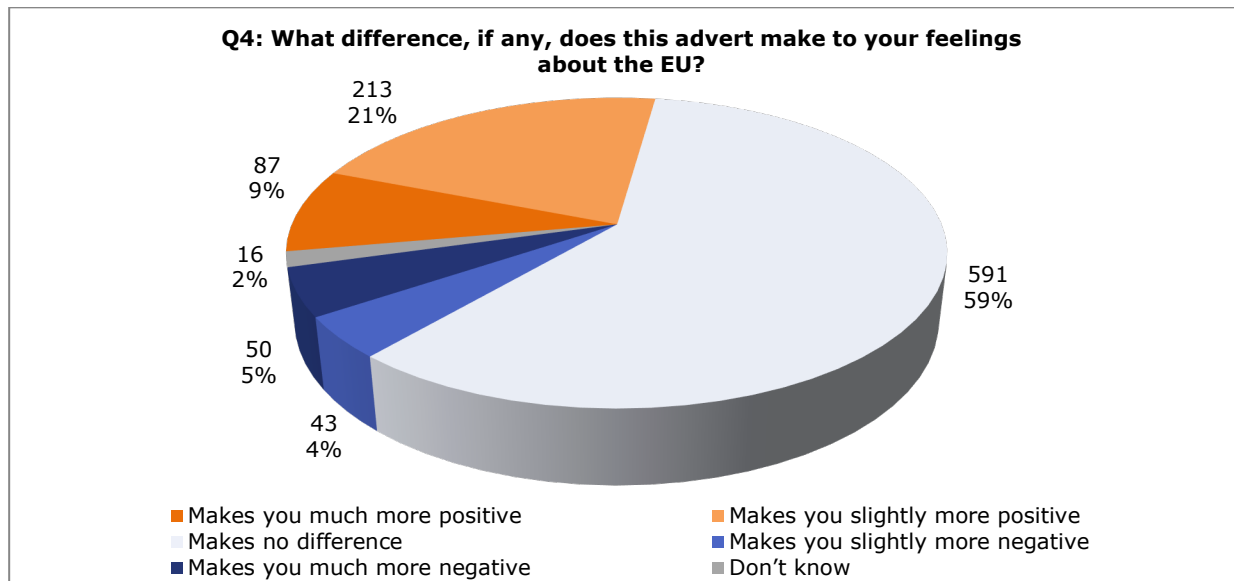


Respondents with a positive view of the EU were most likely to see the advert; 70% indicated that they had seen the advert on television, compared with 61% for respondents with a neutral and 49% of respondents with a negative image of the EU. Conversely, 18% of respondents with a positive image indicated that they had not seen the advert, as opposed to 35% of respondents with a negative view, and 30% of respondents with a neutral view.

**Advert's impact on feelings towards the EU**

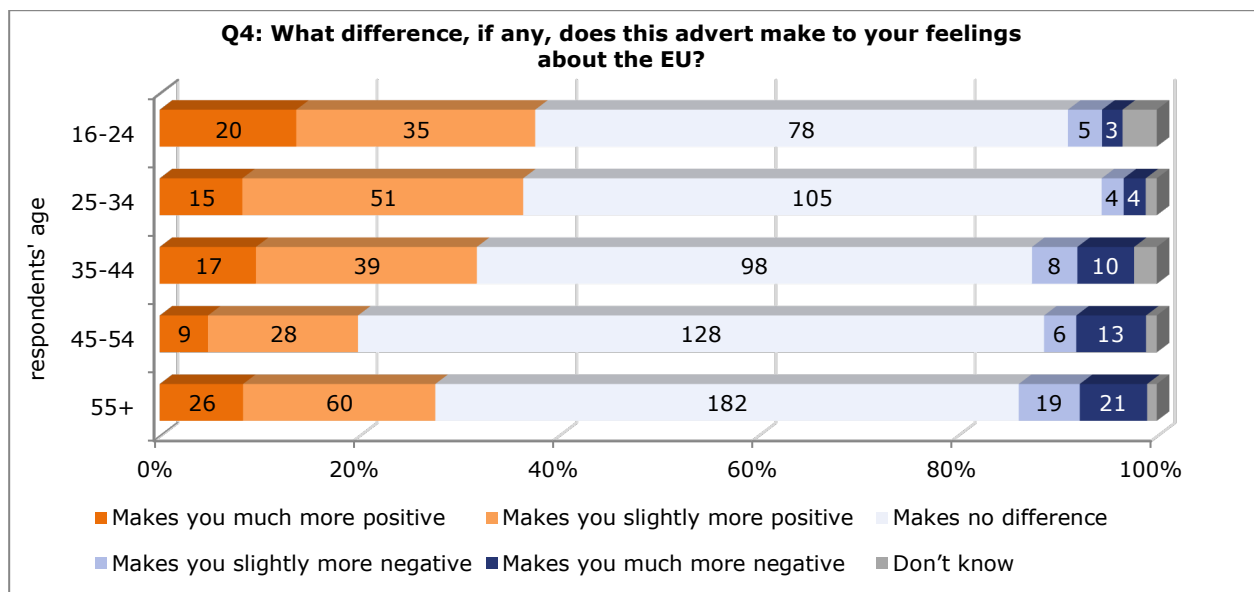
The fourth question asked about the advert's impact on feelings towards the EU among the Latvian respondents.

**Figure 77: Advert's impact on feelings towards the EU in Latvia**



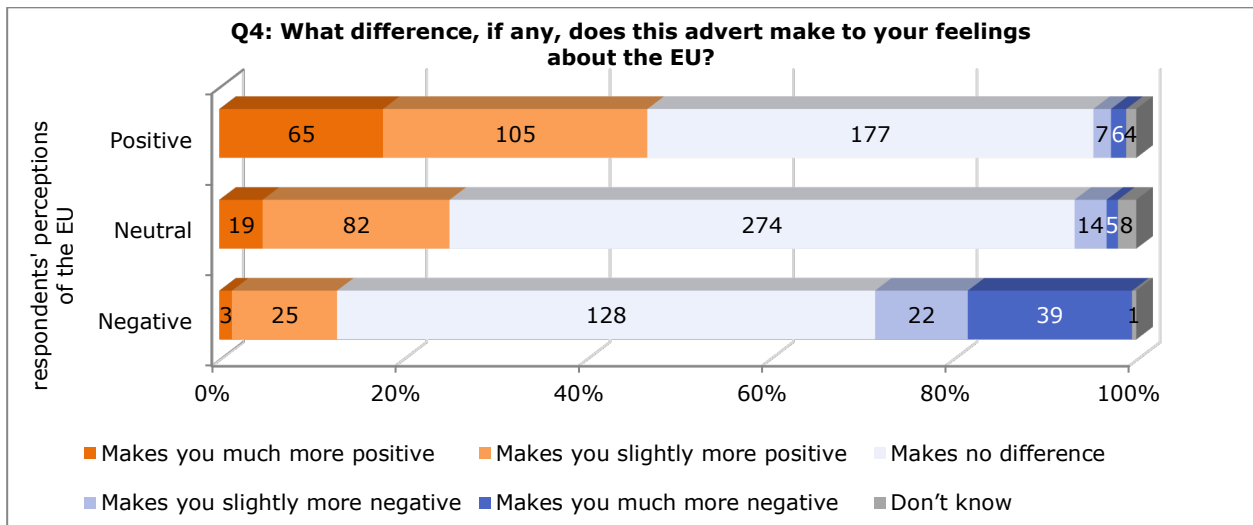
The results show that **30% of respondents indicated that the advert made them feel more positive** about the EU, whereas 9% indicated that it made them feel less positive. However, the majority (59%) of respondents indicated that the campaign made no difference on their feelings about the EU.

**Figure 78: Advert's impact on feelings towards the EU in Latvia, per age group**



Although most respondents indicated that the advert made no difference to their feelings. When comparing different age ranges, the advert had a more **positive impact on younger respondents' feelings** (16 – 34) than older generations. Thirty-eight per cent of respondents aged 16-24 and 36% of respondents aged (25-34) indicated that the campaign had had a positive influence on their feelings about the EU, compared to 32% in the 35-44 group, 29% aged 55-70 and 20% in the 45-54 age group. The proportions of respondents who indicated that the advert had a negative impact on their feeling towards the EU ranged from 13% in the oldest group, through 11% and 10% among the 45-54 year olds and 35-44 year olds, respectively, to 6% in the youngest group and 4% among the respondents aged 25-34.

**Figure 79: Advert's impact on feelings towards the EU in Latvia, per perceptions of the EU**

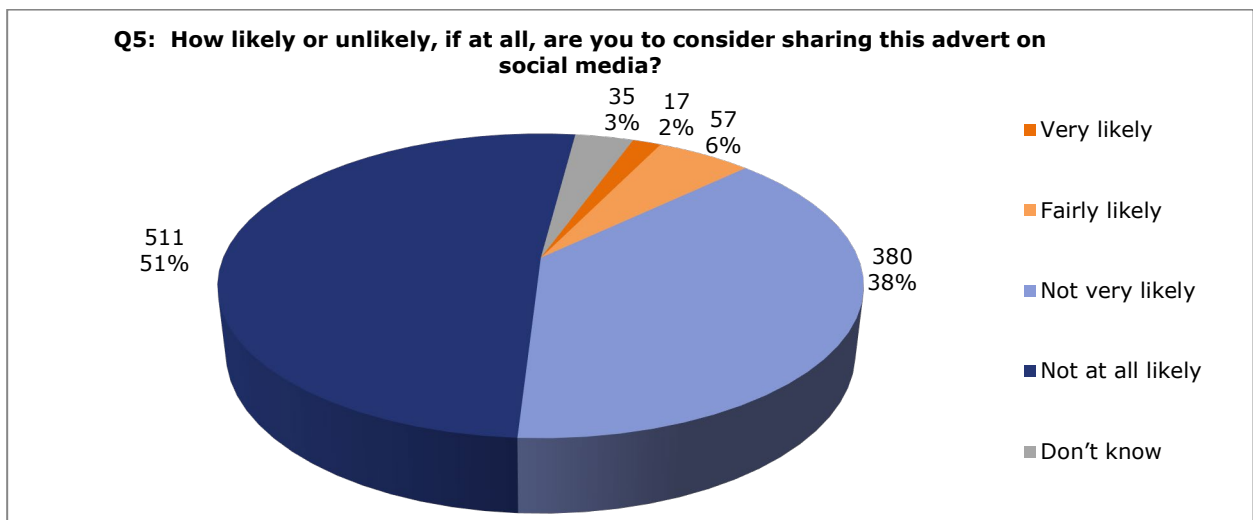


Finally, the figure above reveals that **the advert had the most impact on people with a positive image of the EU**. As such, 47% of respondents with a positive image of the EU indicated that this advert made them more positive about the EU, compared with 25% for people with a neutral image and 13% for people with a negative view. Nonetheless, it is important to note that the advert managed to elicit positive change across all types of opinion.

### Advert and the social media

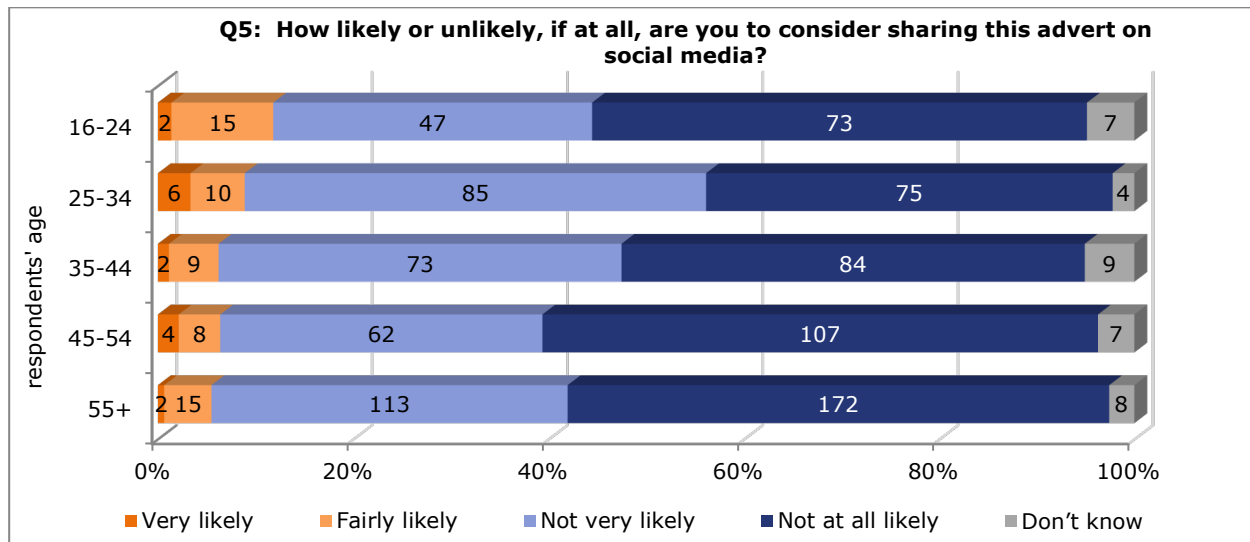
The fifth question asked respondents about the likeliness of their sharing the advert on social media. The sixth question asked about use of social media to follow, get information about, discuss, etc. public policy, social and/or political issues.

**Figure 80: Reported likeliness of sharing the advert on social media in Latvia**



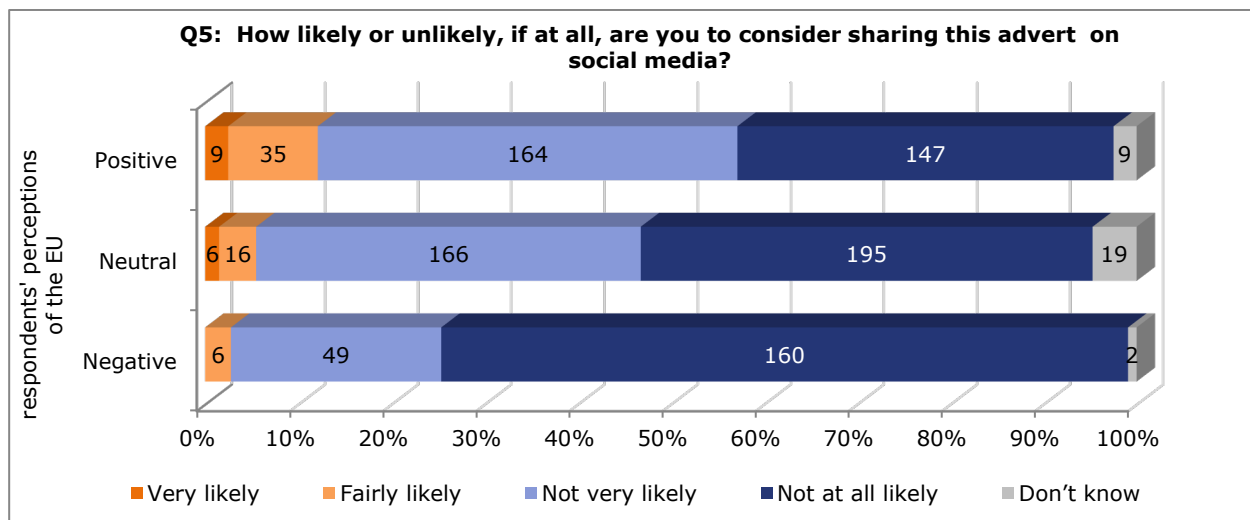
Most people would not share the advert on social media. However, 8% of respondents were willing to share the advert on social media and of these 2% were very likely to do so. Conversely, 51% of respondents indicated that it was not very likely that they would share the advert on social media.

**Figure 81: Reported likelihood of sharing the advert on social media in Latvia, per age group**



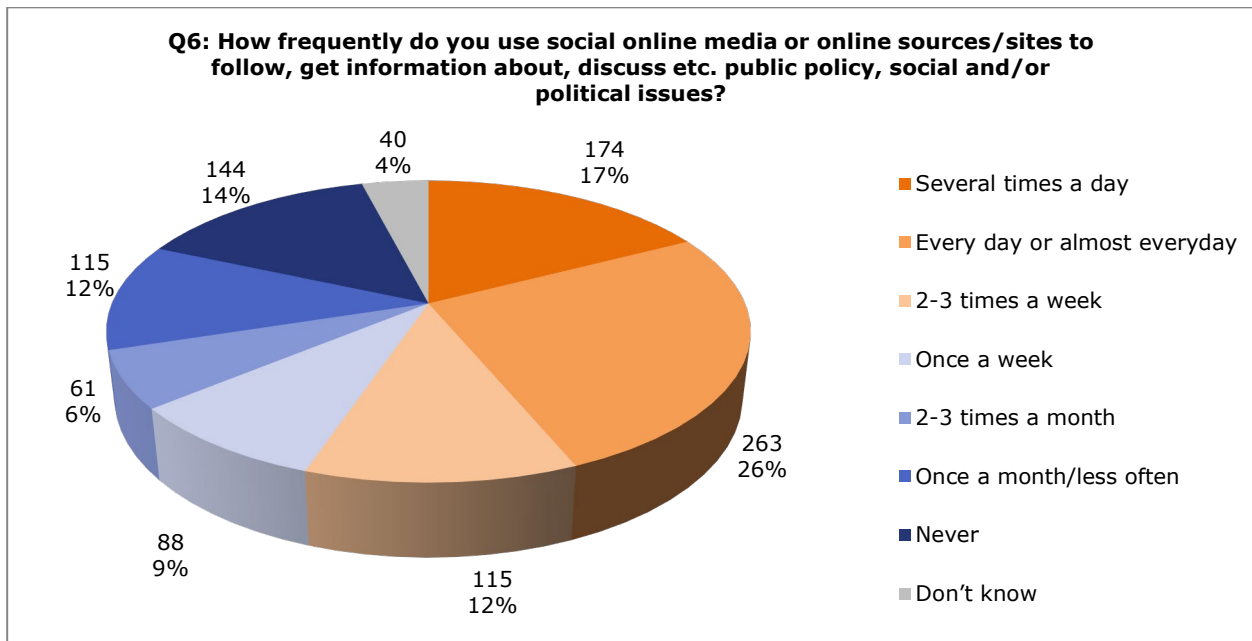
A further breakdown of the results according to the age of respondents shows a greater tendency for younger age groups to share the advert albeit to a small extent. Twelve per cent of respondents aged 16-24 would be likely to consider sharing this advert on social media, compared to 9% for respondents aged 25-34 and 6% for respondents in all of the other age groups.

**Figure 82: Reported likelihood of sharing the advert on social media in Latvia, per perceptions of the EU**



Those who feel most positive about the EU are more likely share the advert (albeit a small proportion 12%). Those who feel most negative are least likely to share the advert (3%), which could actually result in negative publicity. Six per cent of those who with a neutral opinion would be likely to share this advert on social media.

Figure 83: Use of social media in Latvia



The survey revealed that 43% of respondents use social media to follow, get information about, discuss etc. public policy, social and/or political issues several times a day, every day or almost every day, and 12% of respondents use social media 2-3 times a week. Finally, the results also showed that 14% of respondents never use social media for this purpose.

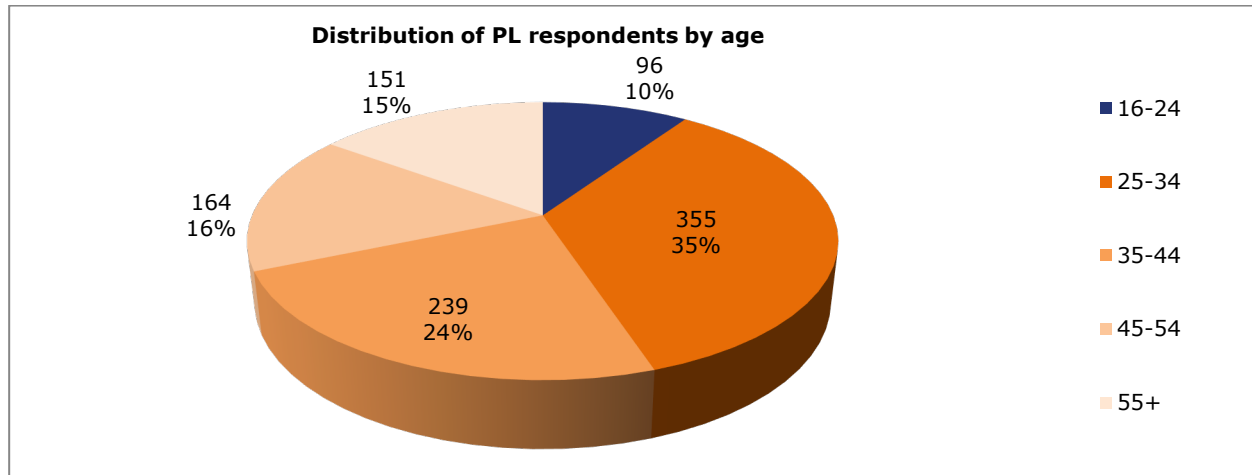
### 3.4 Poland

The omnibus survey in Poland was carried out on the 6<sup>th</sup> February 2015. This was the last Friday of the campaign's broadcast in the Polish TV (the campaign in the TV run from 12<sup>th</sup> January to 8<sup>th</sup> February).

#### 3.4.1 Polish respondents' profiles

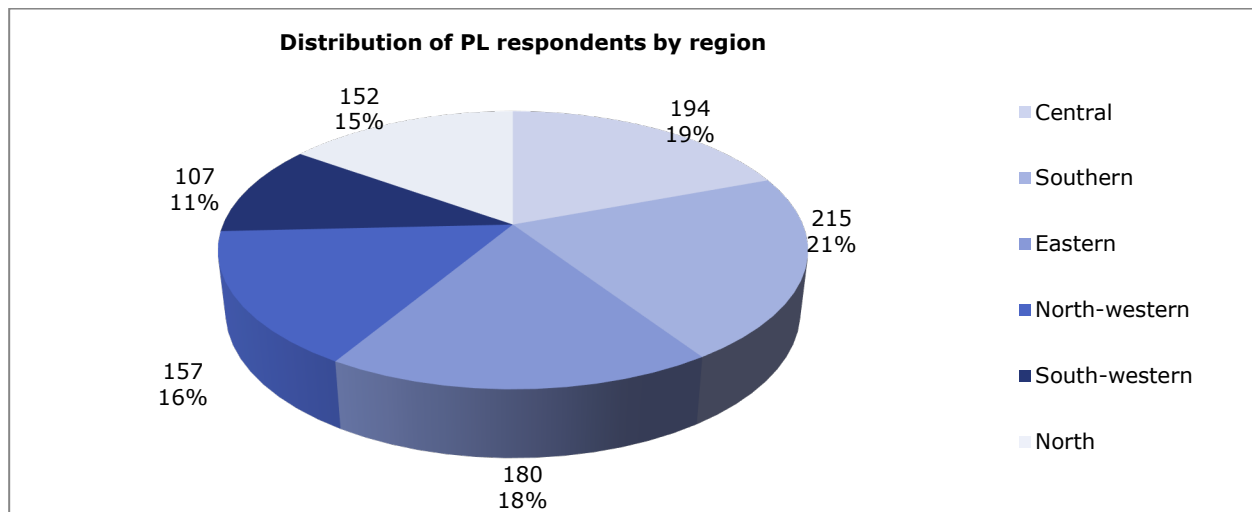
The 1005 survey responses were almost equally divided in terms of gender (men - 503 responses, women - 502).

**Figure 84: Age distribution of Polish respondents**



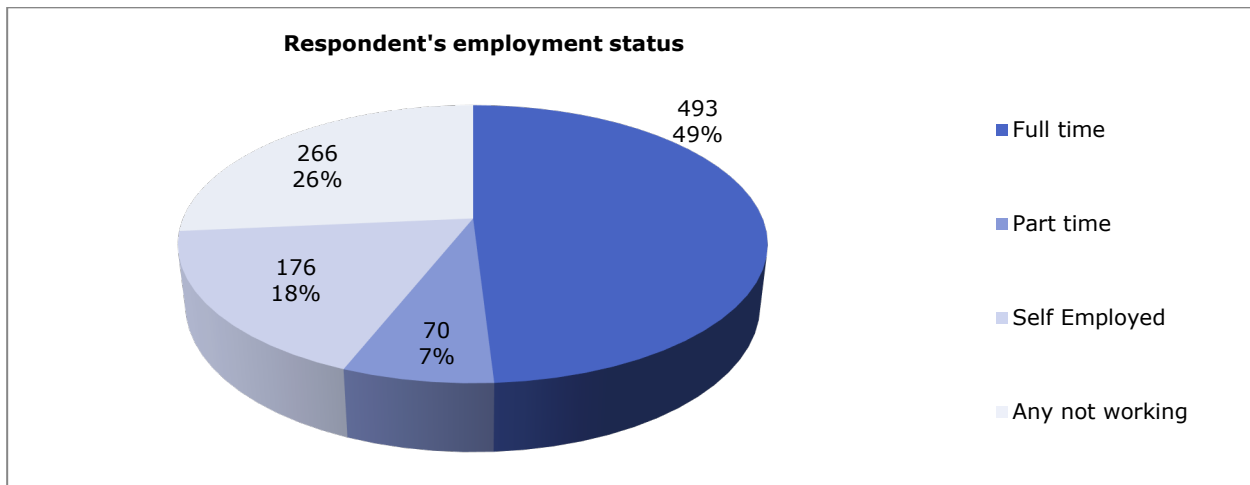
As visible from the figure above, 90% of the respondents fell in the age category 25+, which was defined as the key audience of the Pilot.

**Figure 85: Regional distribution of Polish respondents**



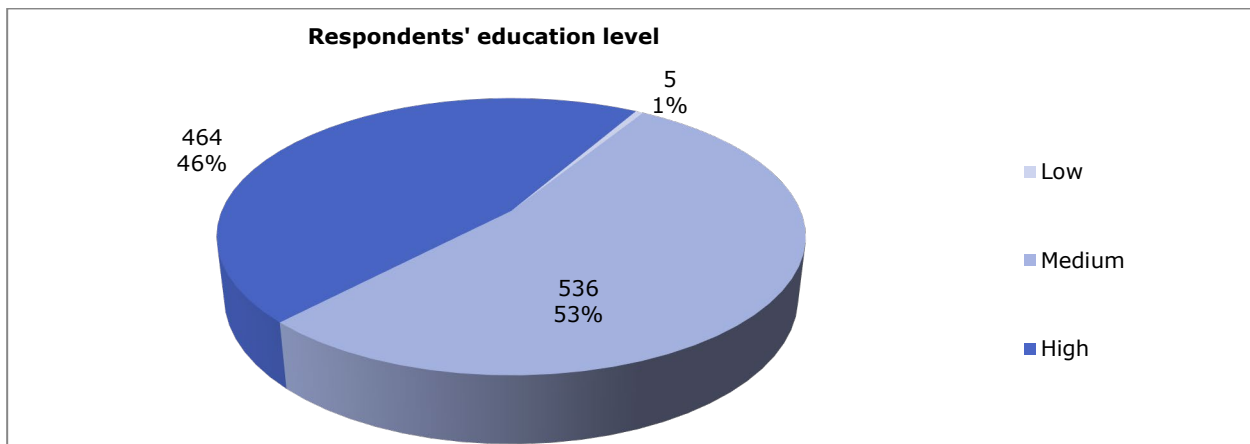
The figure above presents the distribution of the respondents per region, demonstrating that the respondents came from across the whole Poland and it can be assumed that there was no strong regional bias in their responses.

**Figure 86: Employment status of Polish respondents**



The figure above reveals that full-time employed respondents accounted for the largest share of respondents, with almost 50% of respondents indicating that this was their employment status. Not working (i.e. unemployed or students) respondents represented the second largest share, accounting for approximately a quarter of respondents, followed by part-time employed and self-employed respondents, which accounted for respectively 18% and 7% of respondents.

**Figure 87: Education level of Polish respondents**



Respondents who had completed upper secondary ('medium') education accounted for the largest share of respondents, with 53% of respondents indicating that this was their education level. Respondents who had completed their university degrees ('higher education') represented the second largest share, accounting for 46% of respondents. The respondents who have only completed primary or lower-secondary school ('low') accounted for just 1%.



### 3.4.2 Summary of key results for Poland

The analysis of the omnibus survey results yields a number of key findings:

- In our survey, the EU conjures up positive image for most respondents (59%). Across all age ranges, the majority have a positive view except those aged 16-24, which have greater mixed feelings and the highest percentage of respondents with a neutral stance;
- Before being shown an advertisement, **most didn't remember seeing an EU advert**. However, the results suggest that **people who feel positive about the EU were most likely (33%) to have noticed the advert**. This suggests that in Poland it is easier to preach to the converted and much more difficult to reach those who feel ambivalent / neutral.
- In Poland, age and the associated habits of different age groups, do not seem to have been a significant factor that influenced whether or not people noticed the adverts.
- Responses to prompted and unprompted recall are relatively consistent suggesting that **when people noticed the advert they were likely to remember it**, at least in the very short term<sup>18</sup>.
- **Forty-four per cent of respondents did see something of the TV campaign in Poland**. In-line with responses to unprompted recall, people were most likely to have noticed the advert if they had a previous positive view on the EU (37%) in comparison to those with a compared to those with a neutral (26%) and negative stance (25%).
- Although the majority (**54%**) of respondents indicated that the advert made **no difference on their feelings about the EU, a significant proportion (39%) indicated that it made them more positive about the EU**, whereas only 4% indicated that it made them feel less positive. the advert had **the most positive impact on changing the feelings of young people** (45% of 15-24 year olds). Unfortunately, results reported earlier suggest that this was the group who was least likely to have actually seen the adverts on TV.
- **Twenty-three per cent of respondents would be likely to share the advert on social media**. The younger the respondents, the higher the ratio of reporting that they would "Not at all" be likely to consider sharing the advert;

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<sup>18</sup> The survey was carried out in the week following the end of the 2<sup>nd</sup> wave of TV advertising.

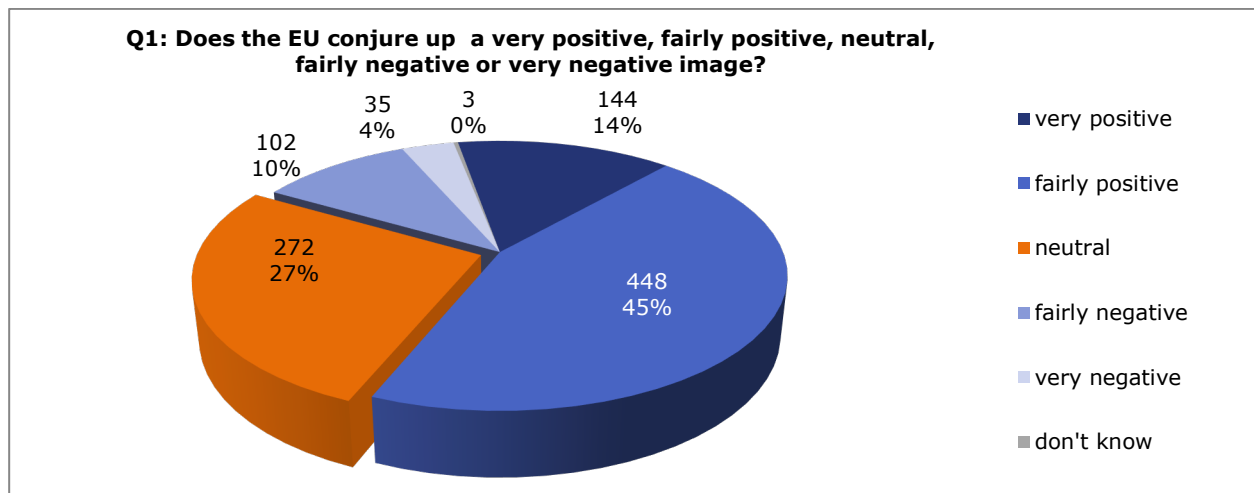
### 3.4.3 Omnibus survey results for Poland

#### Perceptions of the EU

The first question aimed to establish the respondents' overall perceptions of the EU in terms of the image it conjures up.

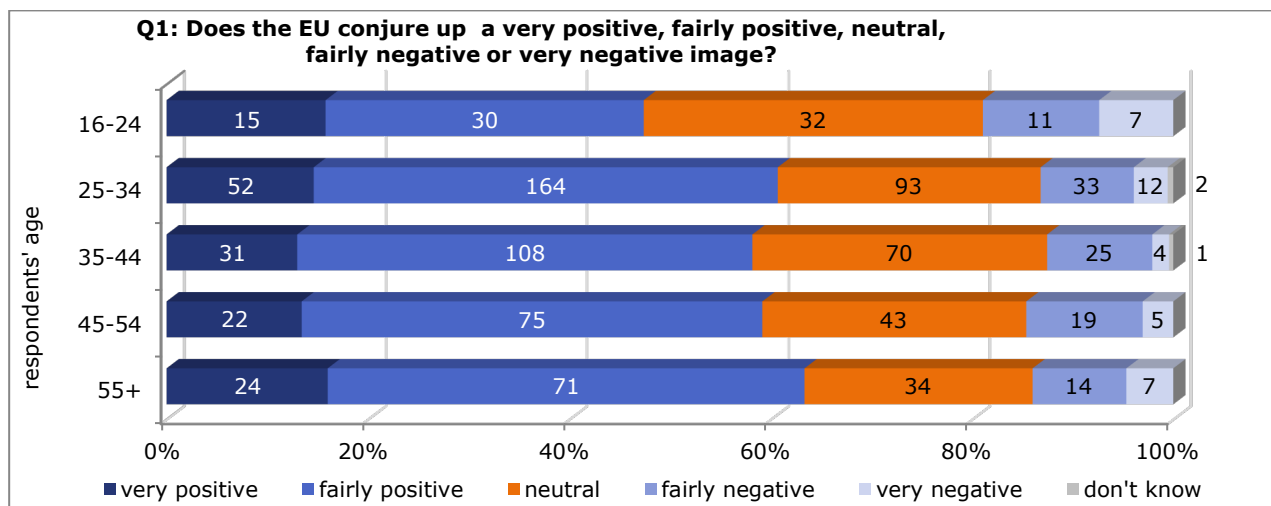
The proportions of the respective responses are presented in the figure overleaf.

**Figure 88: Image of the EU in Poland across all respondents**



In Poland, the majority (almost 60%) of the respondents have a positive (very- or fairly-) image of the EU. The 'neutrals' who were the core target group of the Pilot represent approximately one-third, and persons with a negative view accounted for 14% of the omnibus' respondents. The number of Poles with a positive stance toward the EU is relatively consistent with the findings of the 3<sup>rd</sup> wave of the Eurobarometer survey (52%), however the proportions of 'neutral' and 'negative' respondents are reversed; the Eurobarometer reports these to be 15% and 30%, respectively.

**Figure 89: Image of the EU in Poland, per age group**



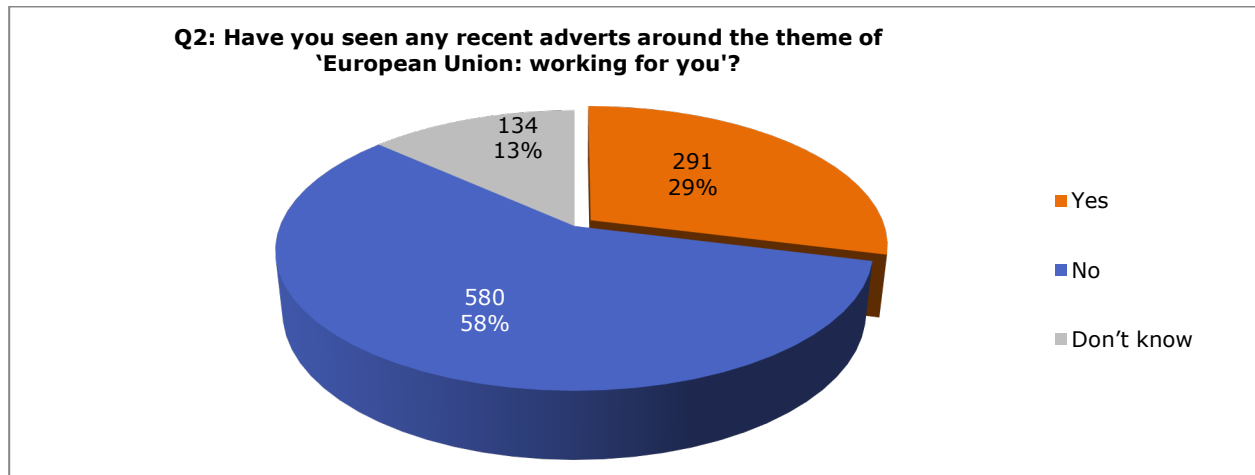
In our survey, the majority of respondents across all age groups, except those from the 16-24 year old group, have a positive view of the EU. The proportion becomes higher with the maturity of the age groups. At the same time, it is among the youngest respondents (16-

24) where the neutral stance is of greatest proportions (32 respondents – 34%). This group seems to have more mixed feelings about the EU than the other age groups.

**Unprompted recall of adverts**

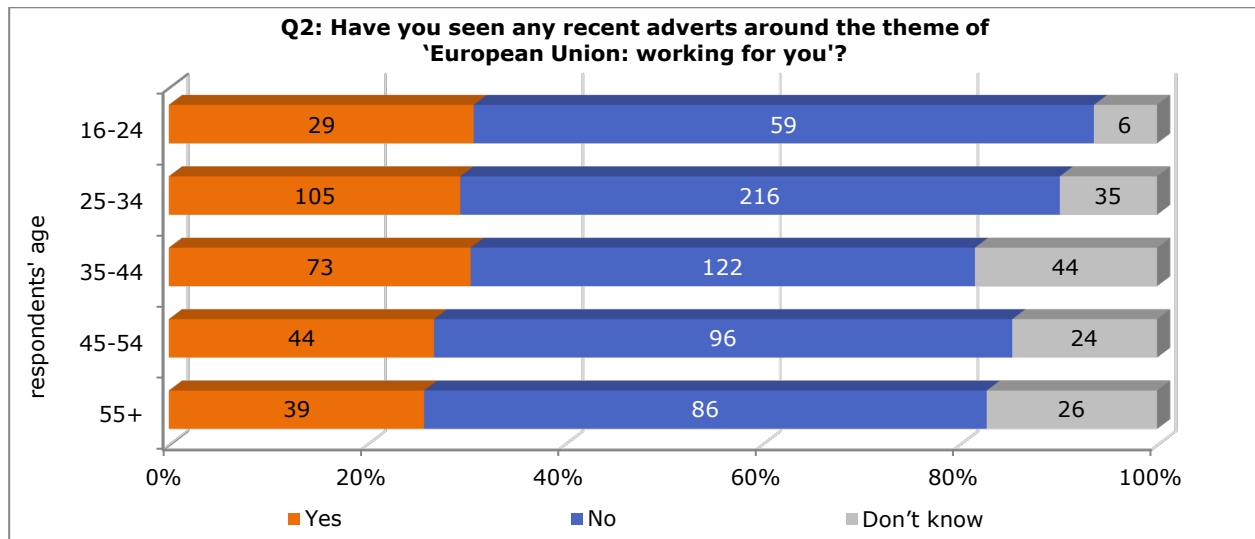
The figure below depicts the proportions of the visually unprompted recall of the Pilot among the total number of respondents.

**Figure 90: Visually unprompted recall of the adverts in Poland**



Before being shown an advertisement, most didn't remember seeing an EU advert. Just under one-third of all of the respondents in Poland indicated that they saw any adverts around the theme "European Union: working for you". Almost 60% indicated that they had not have seen any such adverts and 13% indicated "don't know" as their answer choice.

**Figure 91: Visually unprompted recall of the adverts in Poland, per age group**

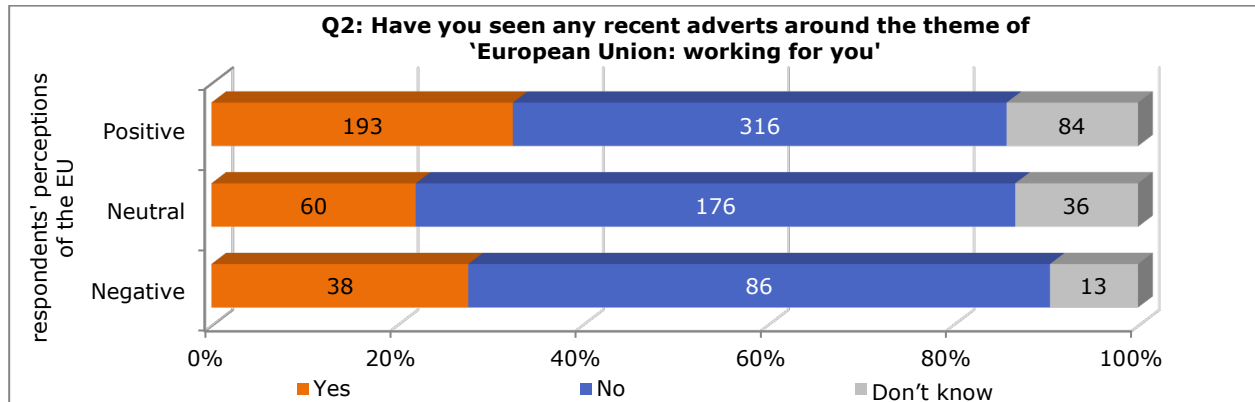


Age and the associated habits of different age groups, do not seem to have been a significant factor that influenced whether or not people noticed or saw the adverts. Among the different age groups (Figure 46) the proportions of respondents who indicated having seen the adverts were almost identical. 31% in the 16-24 and 35-44 age groups reported to have seen the adverts, compared to 29% in the 25-34 age group, 27% in among the 45-54 year olds and 26% in the 55+ age group.

However, the proportions of people who have not seen the adverts did vary more greatly with regards to age. Higher percentages of respondents (over 60%) aged 16-34 did not

recall seeing the advert. These figures were lower for the 35-44 age group (51%) and slightly lower for the other age groups 45 – 55+ (just under 60%).

**Figure 92: Visually unprompted recall of the adverts in Poland, per perceptions of the EU**



Survey respondents were more likely to have seen the adverts if they had a prior positive opinion of the EU. Out of the respondents who reported net positive image of the EU (i.e. *very positive* and *fairly positive* combined), 33% stated that they have seen recent adverts on the topic. Only 22% of the 'neutrals' believed to have seen it, which is lowest of the three stances, as 28% of 'negatives' reported to have seen the adverts. The 'neutrals' were also the group which reported the highest ratio of not having seen the advert (65% compared to 53% of 'positives' and 63% of 'negatives'). This result suggests that it is easier to preach to the converted and much more difficult to reach those who feel ambivalent / neutral.

The survey participants who indicated that they have seen the advert were asked two **additional open questions**, namely

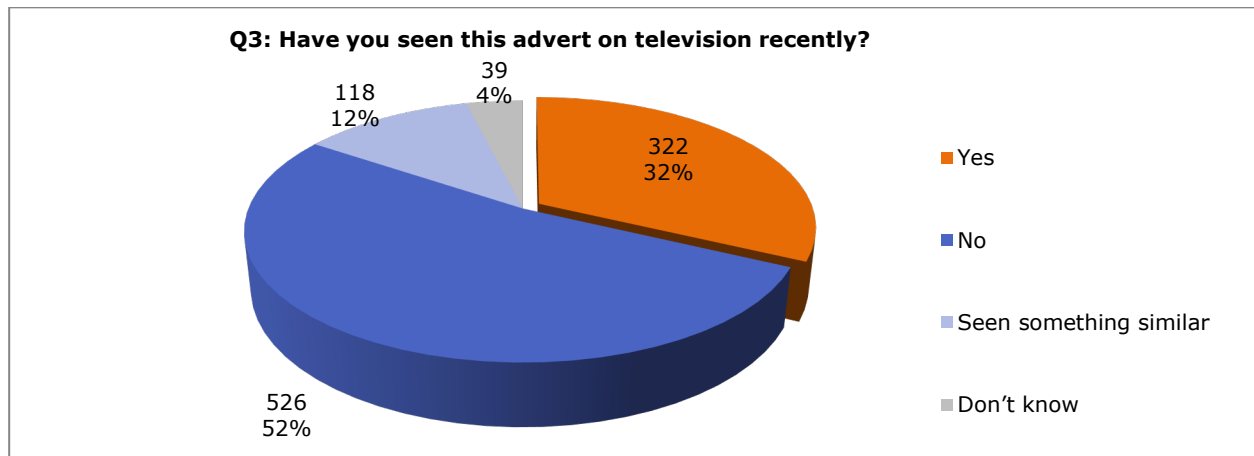
- What did you see/hear in the advertising?
- What else did the advertising tell you?

A great proportion of the respondents (136 out of 290) seemed to have remembered the adverts rather well, either quoting the campaign slogan or describing the adverts' themes (support for green jobs, opportunities for youth, helping SMEs). This helps to ascertain that the results of unprompted recall did relate to the actual campaign to a good extent. The key emerging theme in the open responses seemed to be the varying types of **financial help** offered by the EU recognised by the respondents.

**Prompted recall of adverts**

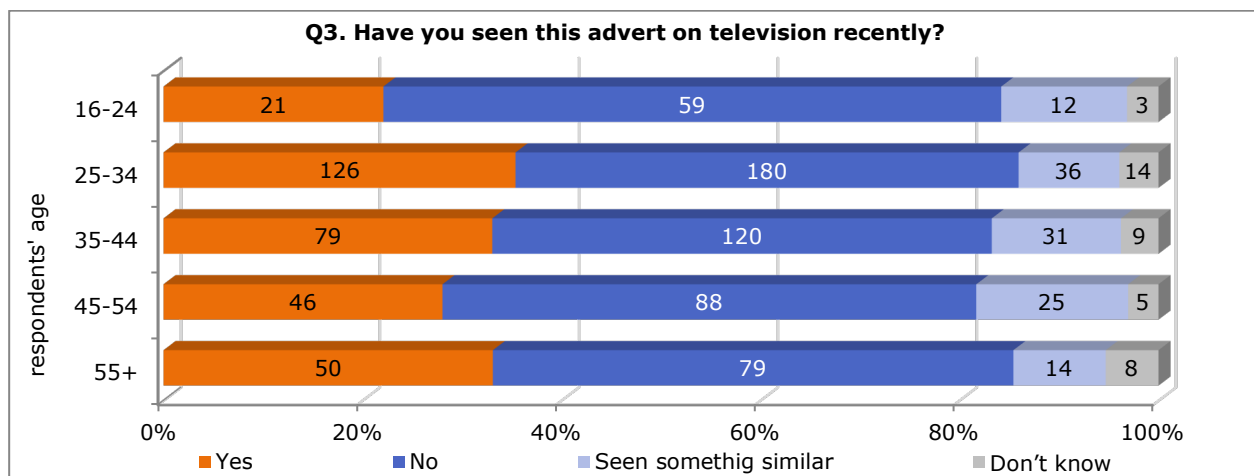
The respondents were shown the national video advert on entrepreneurship (*Marta from Kraków*).

**Figure 93: Visually prompted recall of the adverts in Poland**



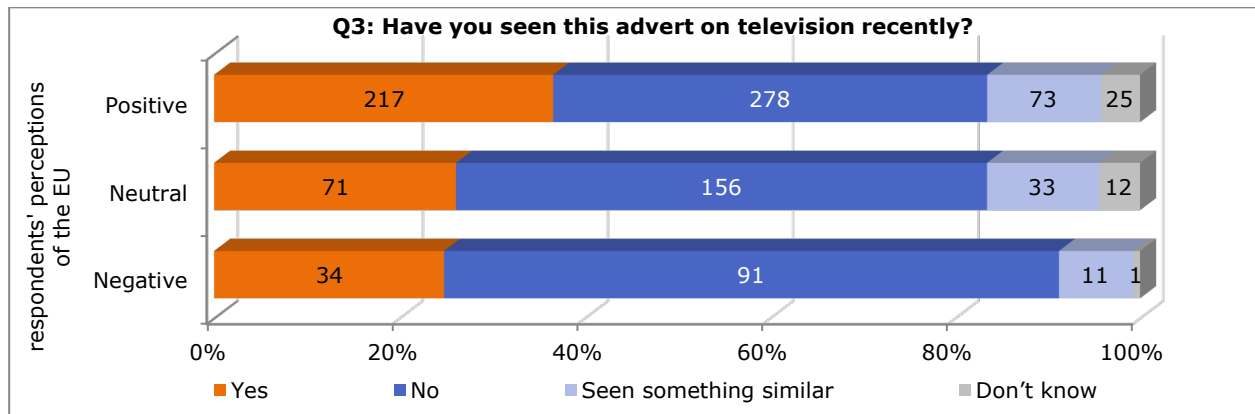
Responses to prompted and unprompted recall are relatively consistent suggesting that when people notice the advert they likely to remember it, at least in the short term. When offered a visual prompt of the advert, the proportion of respondents who recalled seeing the advert on television increased by only 3% (from the 29% without the prompt, to 32%). If taken together with those who thought they had seen something similar, these results could suggest that 44% did see something of the campaign. Interestingly at the same time, the proportion of respondents who reported not to have seen it fell by 4% (from 58% to 52%). 12% of respondents believed that they have seen "something similar" and the number of those choosing the option "don't know" was only 4%.

**Figure 94: Visually prompted recall of the adverts in Poland, per age group**



A further breakdown of the results according to the age of respondents shows that respondents aged 25-33 were the most likely to have seen the adverts on television with 35% of respondents having indicated so. This is comparable to the proportion of the respondents aged 35-44 and 55+, out of whom 33% indicated they have seen the advert on television. The results suggest that TV was less able to reach the younger age group in Poland. Sixty-two per cent of the 16-24 year olds indicated that they had not seen the advert, for the other age groups the incidence oscillated around 50% (51%, 50%, 54% and 52%, respectively). Between 9% and 15% of respondents indicated that they had seen 'something similar' to the advert shown.

**Figure 95: Visually prompted recall of the adverts in Poland, per perceptions of the EU**

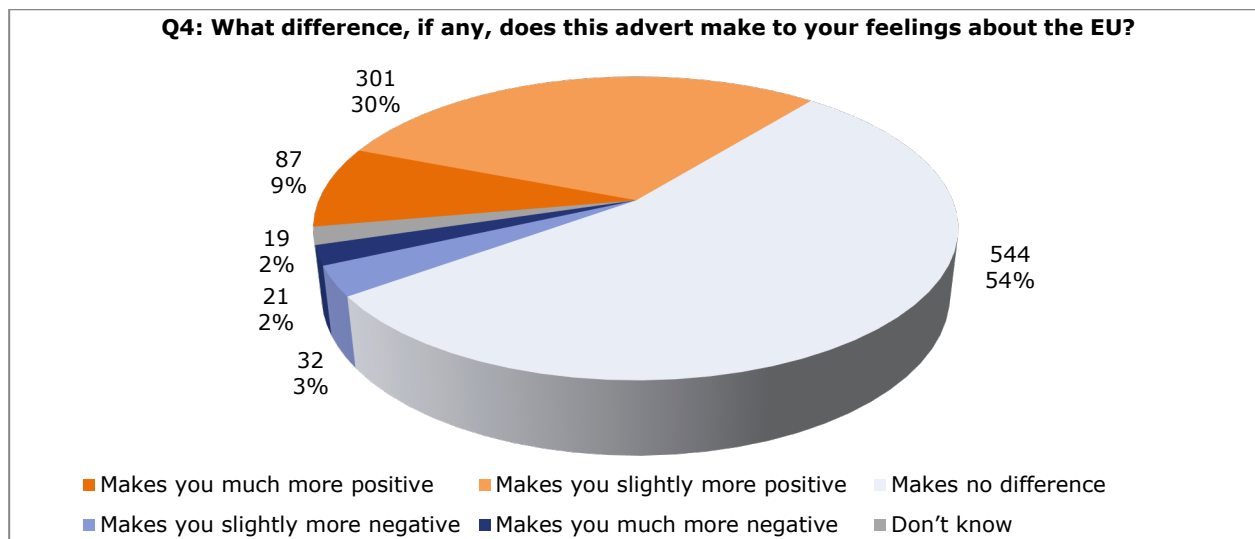


People who feel more positive about the EU were significantly more likely to take notice of the TV adverts in Poland. The ratio of prompted recall varies slightly depending on the respondents' perception of the EU. 37% of those with a positive view of the EU reported to have seen the advert, compared to 26% and 25% of those with a neutral and negative stance, respectively.

**Advert's impact on feelings towards the EU**

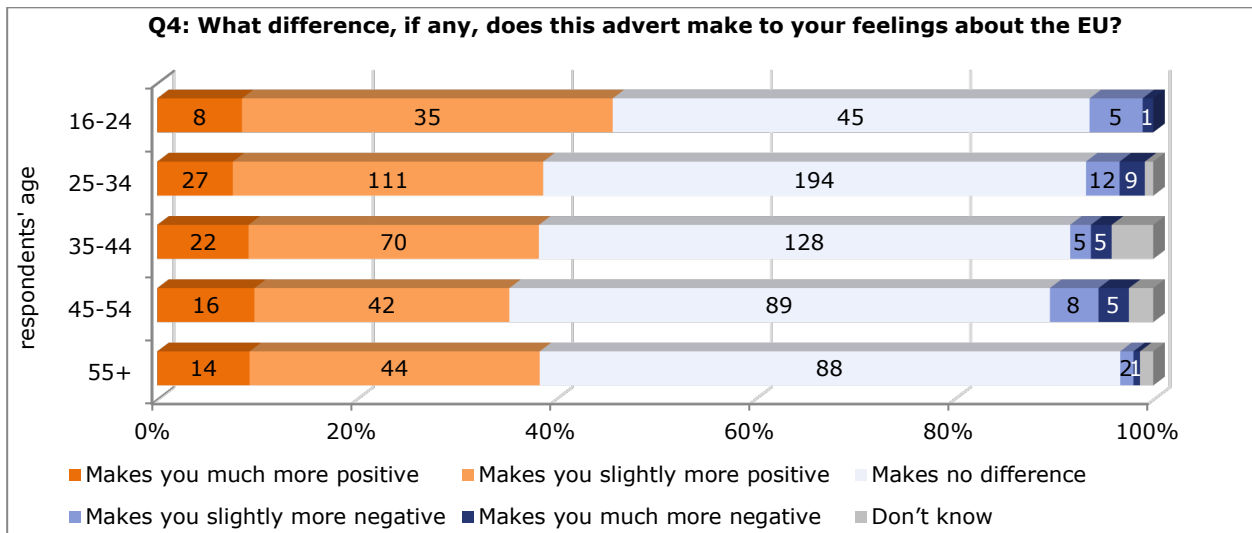
The next question required the survey participants to rate to state what difference, if any, the just shown advert made to their feelings about the EU.

**Figure 96: Advert's impact on feelings towards the EU in Poland**



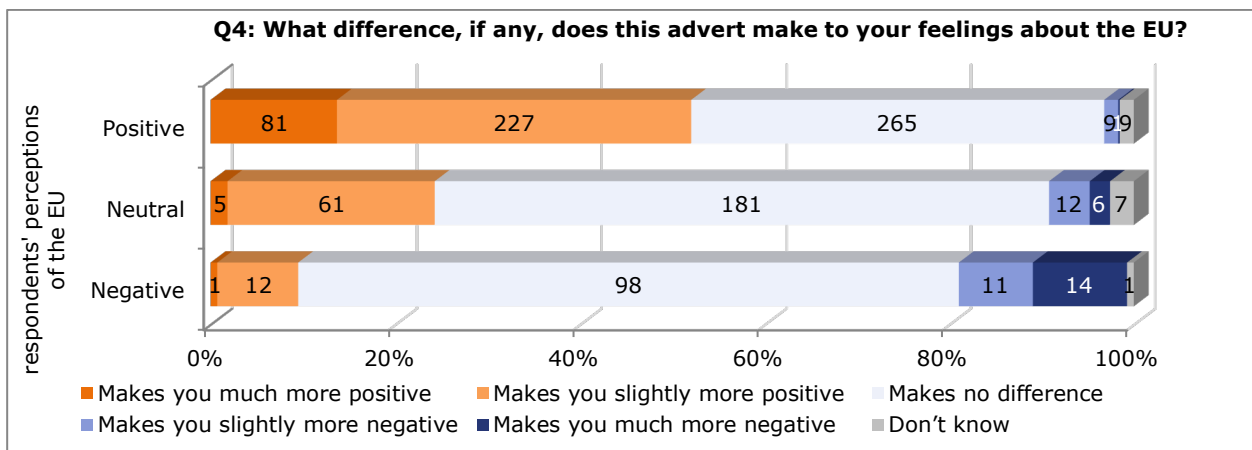
For most survey respondents in Poland (54%), the advert makes no difference to their feelings about the EU. However, at the same time, a significant proportion of respondents (39%) reported that it does make them feel more positive to an extent (9%- much more positive, 30% slightly more positive). It is encouraging to note that for only a very small proportion of Polish respondents (5%), the advert had a negative impact.

**Figure 97: Advert's impact on feelings towards the EU in Poland, per age group**



The analysis of responses per age group presented in the figure above reveals that for over a half of respondents aged over 25 the advert made no difference (respectively 55% 53%, 54% and 58% in the age groups over 25). At the same time, the advert had the most positive impact on changing the feelings of the youngest age group (45% of net positive changes reported, compared to approx. Unfortunatly, results reported earlier suggest that this was the group who was least likely to have actually seen the adverts on TV. 30% across the older groups). Overall, no more than 8% reported to feel more negative about the EU as the result of the advert.

**Figure 98: Advert's impact on feelings towards the EU in Poland, per perceptions of the EU**

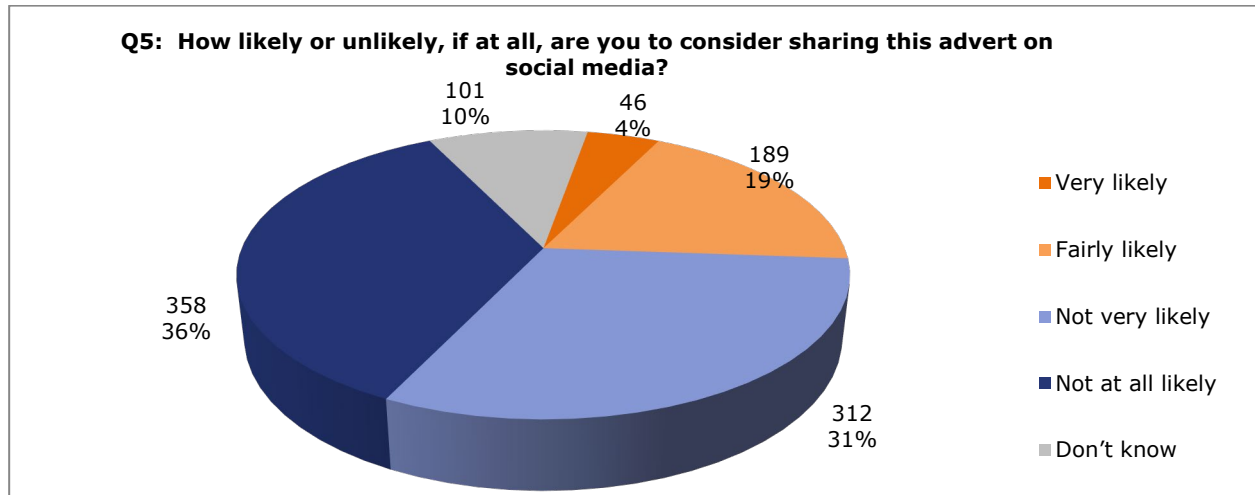


The advert had the biggest impact on people in Poland who already felt positive about the EU. The figure above reveals that 52% of respondents with an already positive image of the EU indicated that this advert made them much more or slightly more positive about the EU; 45% of them reported that the advert made no difference. At the same time, 25% of respondents with a neutral image of the EU indicated that the advert had a positive impact on their feelings about the EU. The definite majority of the 'neutrals' (67%) reported that the advert made no difference to their feelings. The advert was reported to make a positive change in the feelings of those with a negative stance in only 10%, a proportion identical to the reported negative change.

**Advert and the social media**

The respondents were asked how likely they are to consider sharing the shown advert on social media, and about their general social media habits.

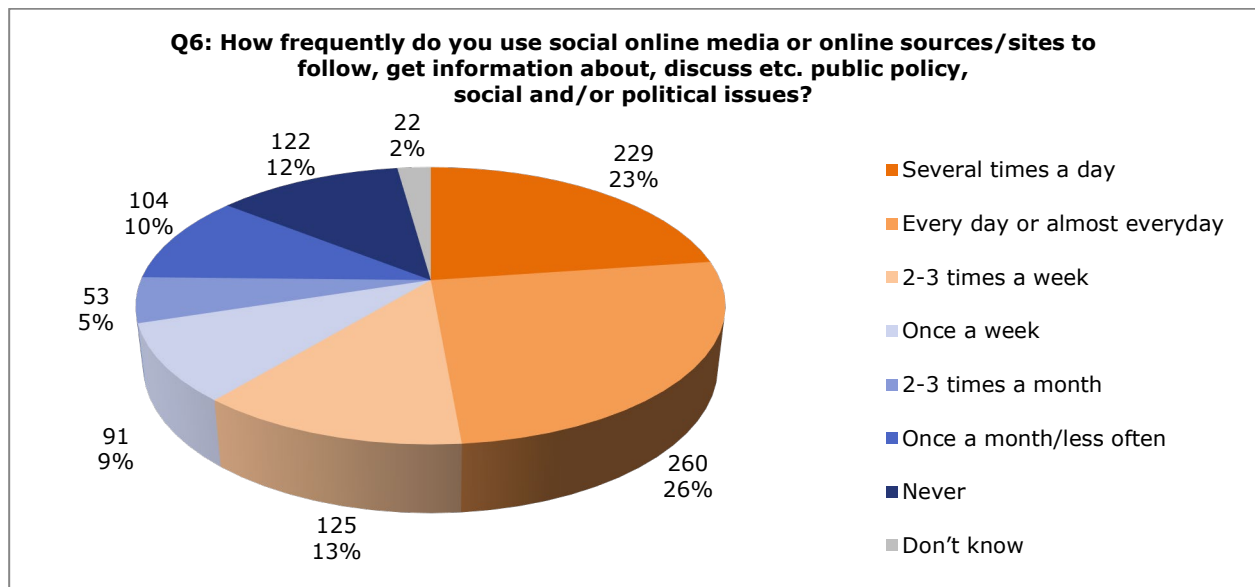
**Figure 99: Reported likelihood of sharing the advert on social media in Poland**



Only 23% of all respondents would be at all likely to share the advert on social media. Any shares represent free advertising for the campaign, therefore this outcome can be perceived as encouraging.

To put those findings in context, the figure overleaf presents the reported use of social media among the respondents.

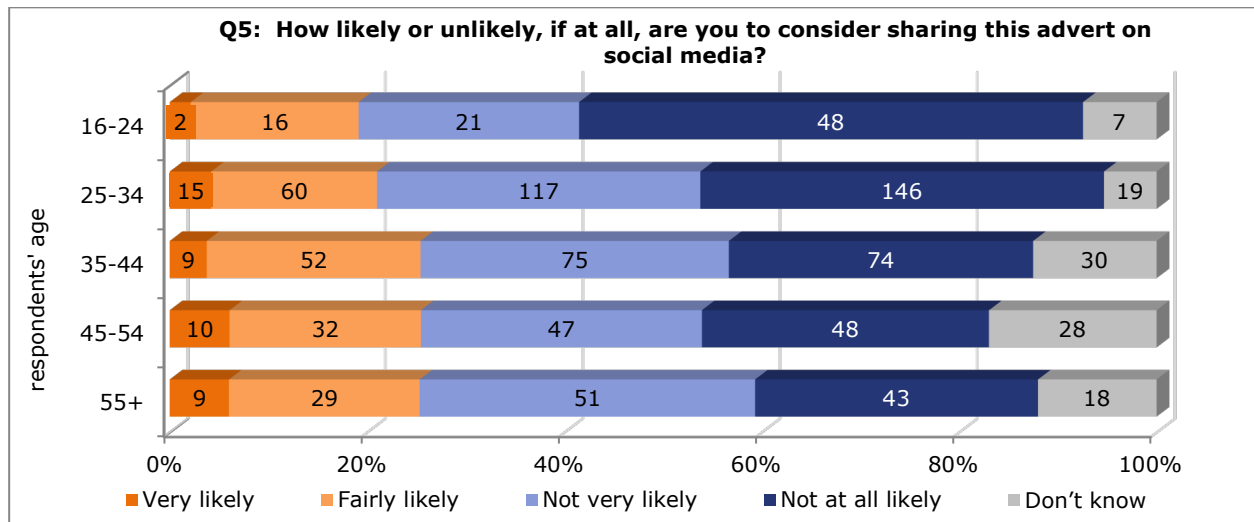
**Figure 100: Use of social media in Poland**



It can be clearly visible, that the definite majority of respondents are avid users of online media, including social, with 62% reporting that they use social media and or/online resources to follow and discuss public policy, social and/or political issues at least 2-3 times a week.

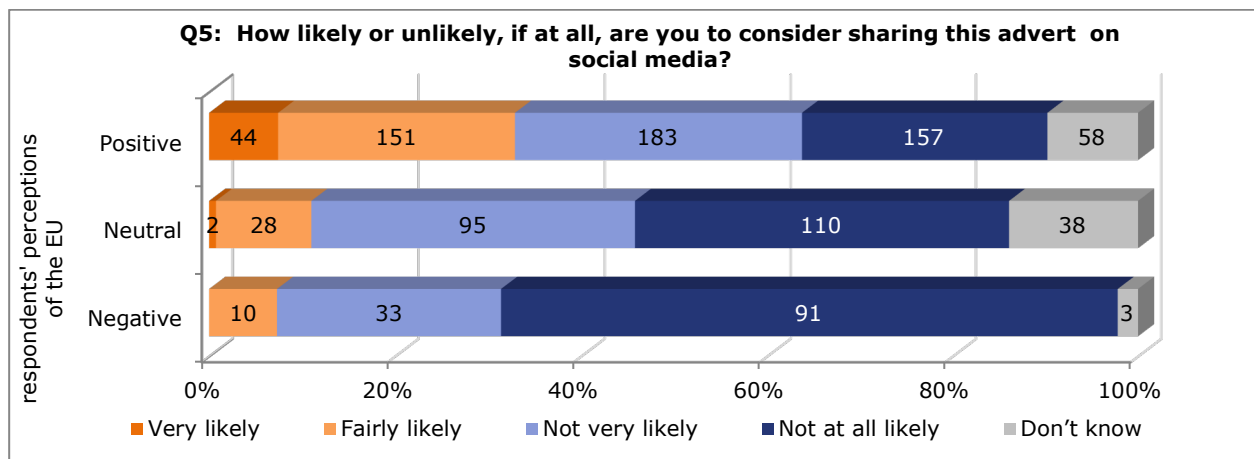


**Figure 101: Reported likelihood of sharing the advert on social media in Poland, per age group**



A breakdown of the results of respondents' reported likelihood to share the advert according to their age shows that 25% of respondents aged over 45 would be likely to consider sharing this advert on social media. This can be compared to respectively 19%, 21% and 26% for respondents aged 16-24, 35-44, and over 55-70. Furthermore, the younger the respondents, the higher the ratio of reporting that they would "Not at all" be likely to consider sharing the advert (51% of 16-24s, 41% of 25-34s, 31% of 35-44s and 29% for the respondents over 45).

**Figure 102: Reported likelihood of sharing the advert on social media in Poland, per perceptions of the EU**



The results of the survey show that respectively 32%, 11% and 7% of respondents with a positive, negative and neutral opinion would be likely to consider sharing the advert on social media at all. Conversely, 58%, 75% and 90% of the respondents in the three categories indicated that they were unlikely to do so.

### 3.5 Portugal

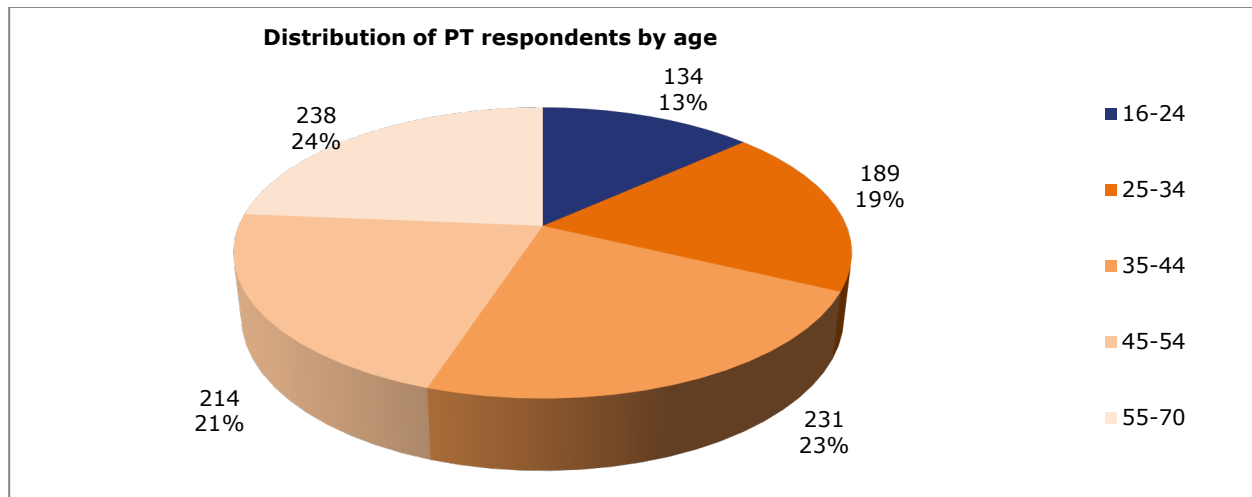
The omnibus survey in Portugal was carried out on 30 January 2015, which was towards the end of the second wave of television advertising in Portugal.

#### 3.5.1 Portugal respondents' profiles

This section provides a description of the profiles of the 1006 respondents to the survey in Portugal, according to their gender, age, region of residence, employment status and education level.

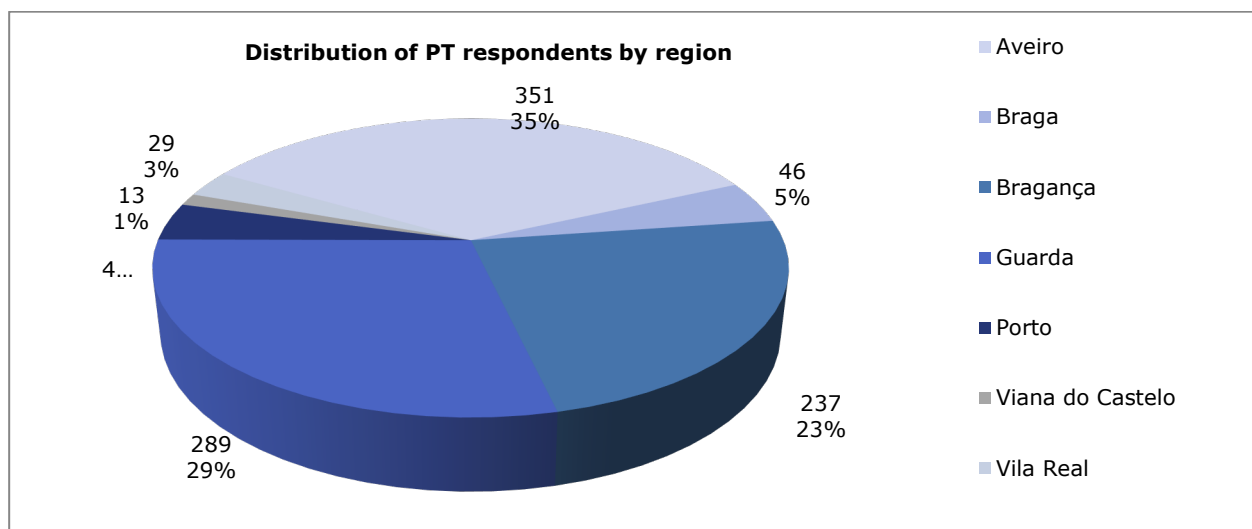
In this survey 48% of respondents were men, and 52% of respondents were women.

**Figure 103: Age distribution of Portuguese respondents**



Respondents aged 55-70 accounted for the largest share of respondents, with 24% of respondents indicating that they belong to this age category, as shown in the figure above. Respondents aged 35-54 represented the second largest share, accounting for 23% of respondents, followed by respondents aged 45-54, 25-34, and 16-24, which accounted for respectively 21%, 19% and 13% of respondents. Respondents within the target age group of the pilot, which is 25-70, therefore accounted for 87% of respondents.

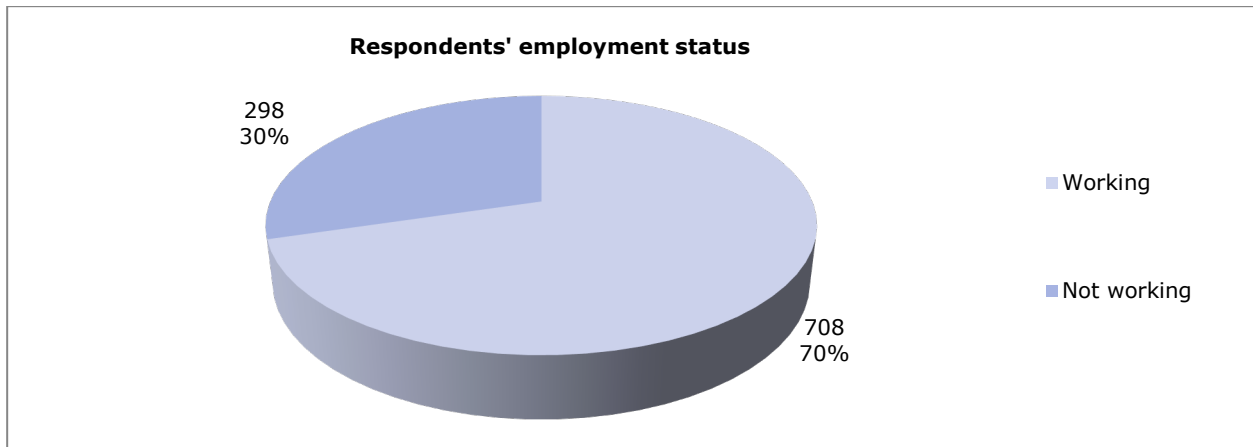
**Figure 104: Regional distribution of Portuguese respondents**



Respondents from the Aveira region represented the largest share of respondents, as they accounted for 35% of total respondents, followed by respondents from the Guarda region,

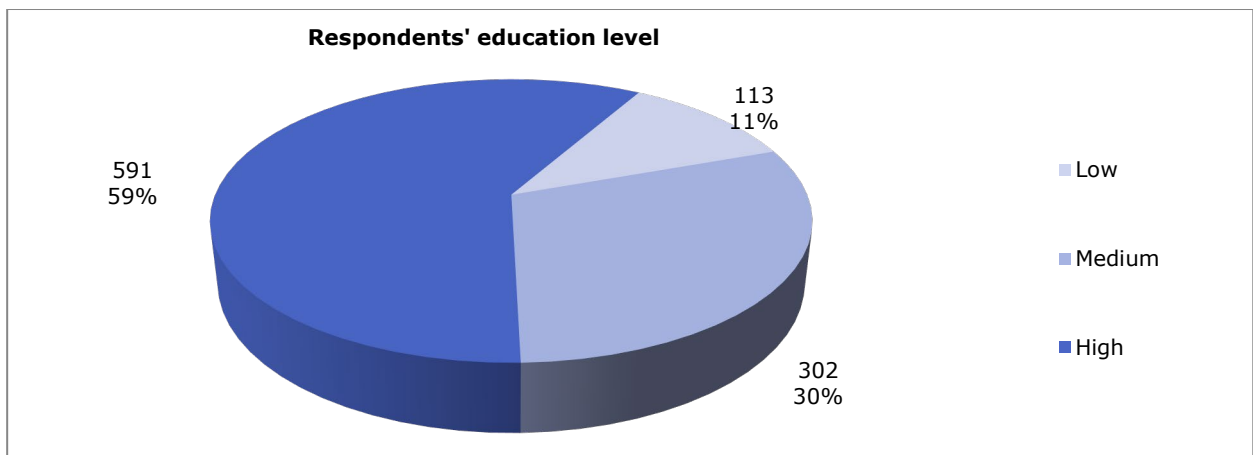
and the Bragança region, , which accounted for respectively 29% and 23% of respondents, as shown in the figure above.

**Figure 105: Employment status of Portuguese respondents**



The figure above shows that the number of survey respondents who are currently working accounts for 70% of respondents. Not working may not necessarily mean registered unemployed, as this group also covers students, family carers and the retired.

**Figure 106: Education level of Portuguese respondents**



Respondents having completed a higher education level (a university degree) accounted for the largest share of respondents, with 59% of respondents indicating that this was their education level, as shown in the figure above. Respondents having completed a medium level of education (upper level of secondary education) represented the second largest share, accounting for 30% of respondents, followed by respondents having completed a low education level (primary and lower level of secondary education), which accounted for 11% of respondents.

### 3.5.2 Omnibus survey summary of key results for Portugal

A number of key findings can be drawn from the survey. These are:

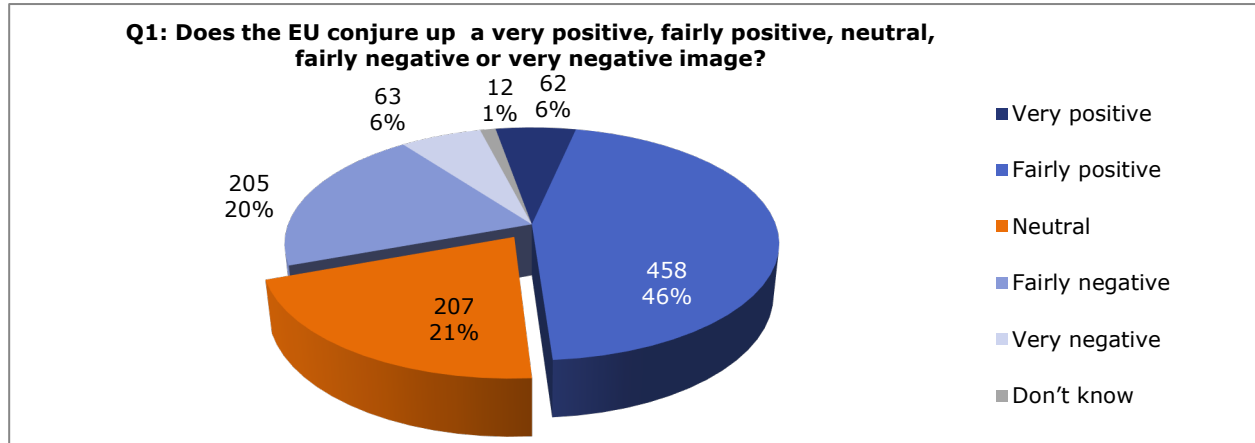
- The EU conjures up positive image for the majority of respondents to this survey (52%), particularly among both young (16-24) and more elderly (55-70) people. If comparison is made with the 3<sup>rd</sup> wave Eurobarometer data, the number of respondents with a positive image of the EU is greater by 14 percentage points;
- **Circa one third of respondents (31%) indicated that they had seen the adverts**, and in particular respondents aged 35-44, and respondents with a positive image of the EU;
- Circa one third of respondents (32%) indicated that they had seen the Entrepreneurship (Marta from Porto) advert on TV, and particularly respondents aged 25-34-. The consistency of these results with the results of the unprompted visual recall question, suggests that **those who saw the advert in Portugal remembered it**.
- Having **a prior favourable pre-disposition to the EU meant that respondents were more likely to notice the adverts**. Whereas in some other countries the results suggest that the advert amplified positive and negative views on the EU, in Portugal this did not seem to be the case. As would be expected, this group also responded most positively when shown the advert; 69% indicated feeling even more positive.
- Having seen the advert during the survey, **the majority of respondents (56%) indicated that it made them more positive about the EU**, whereas only 1% indicated that it made them feel less positive. **The advert struck a chord with the young people. Seventy-seven per cent of respondents aged 16-24 indicated it positively influenced their feelings about the EU.**
- In Portugal, the survey suggests **most people wouldn't share the advert on social media. Nonetheless, 19% report that they would be likely to share it**. To put this in context, 30% of respondents use social media to follow, get information about, discuss, etc. public policy, social and/or political issues several times a day.

### 3.5.3 Omnibus survey results for Portugal

#### Perceptions of the EU

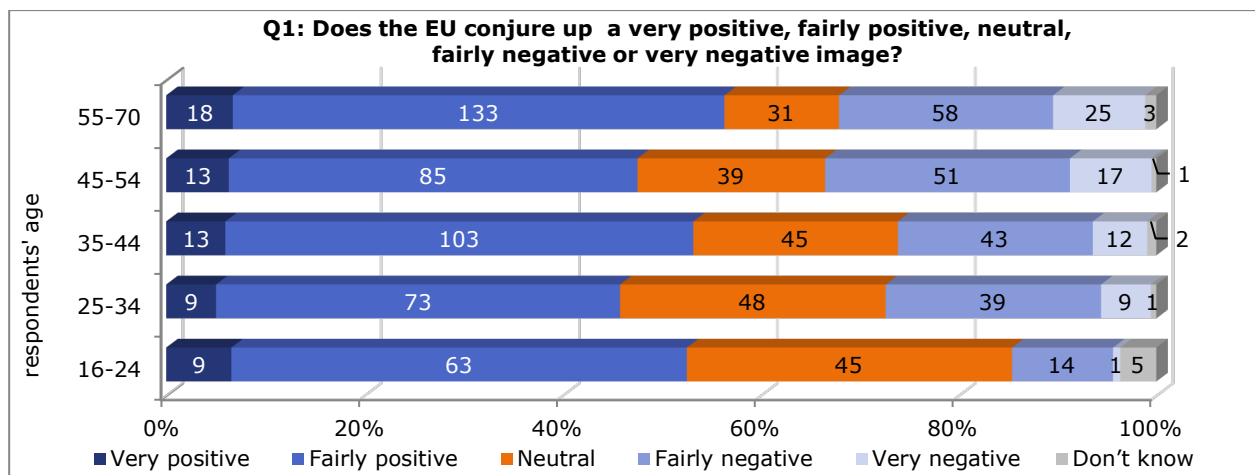
The first question relates to the perception that respondents to the survey have of the EU.

**Figure 107: Image of the EU in Portugal across all respondents**



The EU conjures up a neutral image for 21% of respondents to the survey in Portugal, whereas it conjures up a fairly positive image for 46% of respondents, and fairly negative for 20% of respondents, as shown in the figure above. Overall, the EU conjures up a positive image for 52% of respondents, and a negative image for 27% of respondents. When comparing against the 3<sup>rd</sup> wave Eurobarometer data, the number of respondents with a positive image of the EU is higher by 14% than that reported by Eurobarometer.

**Figure 108: Image of the EU in Portugal, per age group**



A further breakdown of these results per age category, as shown in the figure above, reveals that 33% of respondents aged 16-24 have a neutral image of the EU, followed by 27% of respondents aged 25-34, 21% of respondents aged 35-44, 19% of respondents aged 45-54 and 11% of respondents aged 55-70.

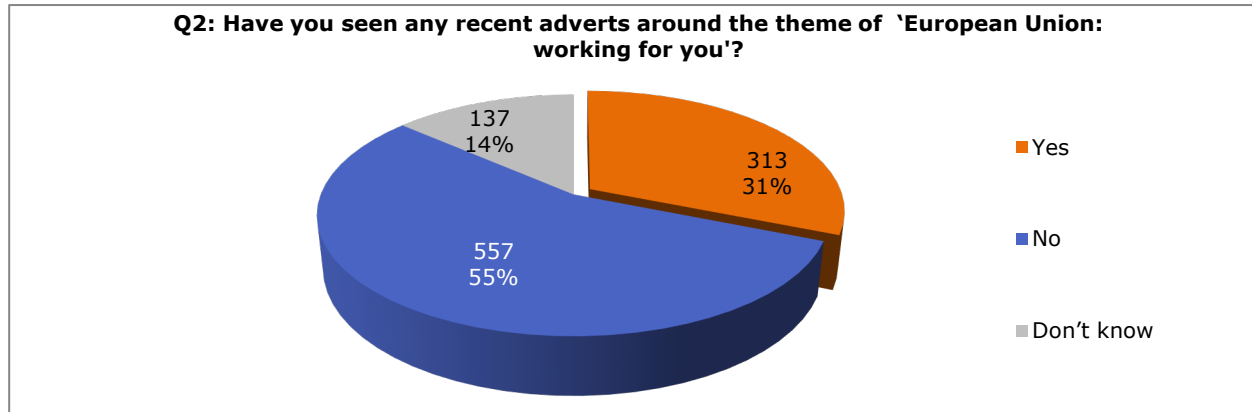
Although the majority of respondents across all age categories have a positive view of the EU, the share of respondents indicating that they had a very positive view is highest among the respondents aged 16-24 and 55-70, with in both cases 7% of respondents indicating that this was the case. At the same time, the younger age groups seem to be somewhat more neutral than for example the older age group, which could suggest that this older

group have views that are more entrenched and / or that the younger group are either less informed and or less interested than other older respondents.

**Unprompted recall of adverts**

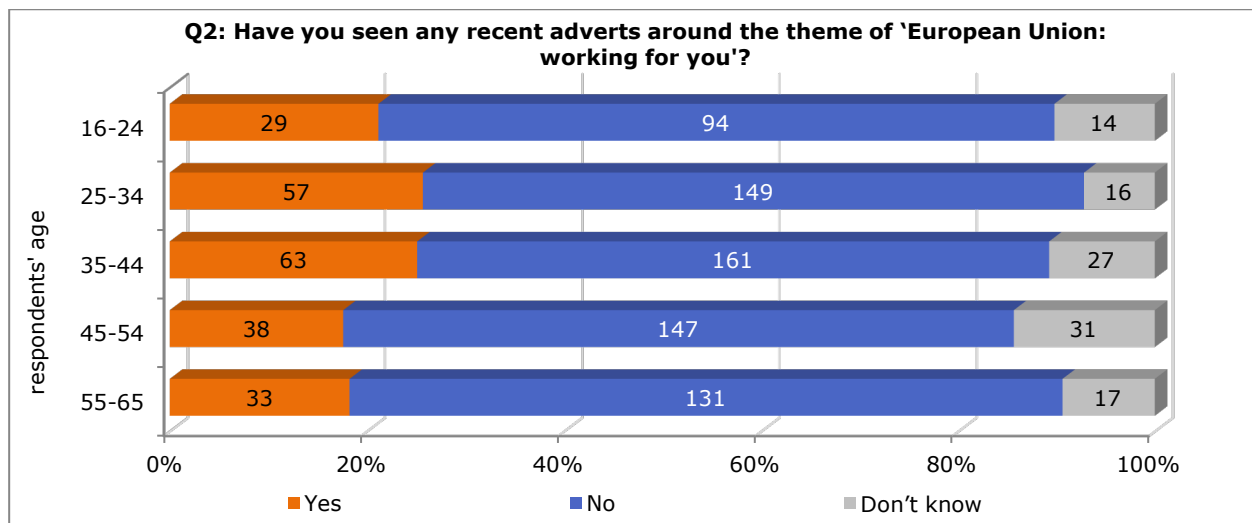
The second question relates to the whether participants recalled the adverts.

**Figure 109: Visually unprompted recall of the adverts in Portugal**



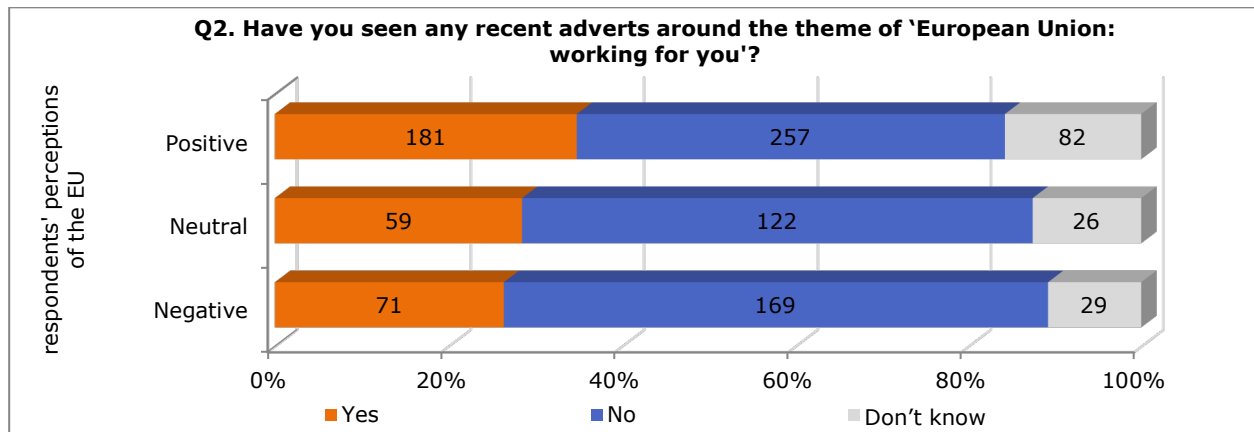
The figure above reveals that 55% of respondents indicated that they had not seen any recent adverts around the theme of 'European Union: working for you'. However, 31% of respondents indicated that they had seen the adverts, and 14% indicated that they did not know.

**Figure 110: Visually unprompted recall of the adverts in Portugal, per age group**



A further breakdown of the results according to the age of respondents shows a relatively even picture across the age ranges. Although respondents aged in the 25 – 44 age range were the most likely to have seen the adverts (35%) and (34%). Thirty-two per cent of respondents aged 16-24, 31% of respondents aged 45-54 and 27% of respondents aged 55-70 indicated that they had seen the ads.

**Figure 111: Visually unprompted recall of the adverts in Portugal, per perceptions of the EU**



The figure above reveals that respondents with a positive image of the EU were the ones that indicated that they had seen the adverts most, with 35% indicating that this had been the case, as opposed to 29% of those with a neutral view, and 26% of those with a negative image of the EU.

The survey participants who indicated that they have seen the advert were asked two **additional open questions**, namely:

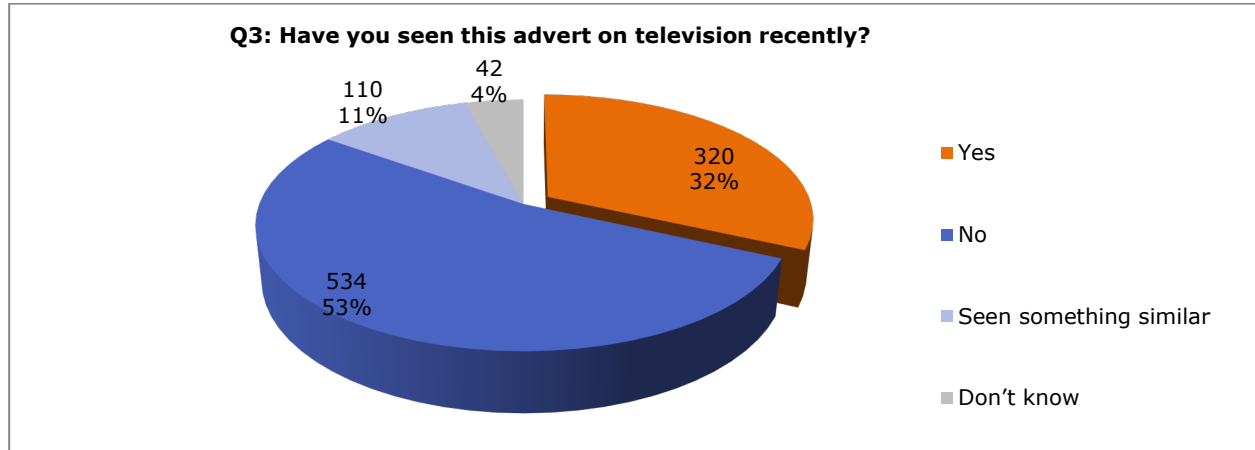
- What did you see/hear in the advertising?
- What else did the advertising tell you?

A great proportion of the respondents (223 out of 313) seemed to have remembered the adverts rather well, either quoting the campaign slogan or describing the adverts' themes (support for green jobs, opportunities for youth, helping SMEs). This helps to ascertain that the results of unprompted recall did relate to the actual campaign to a good extent. For respondents that indicated that they had seen the adverts, the vast majority of them viewed them positively and associated them with notions such as support for green projects and new businesses, economic growth, new opportunities, youth, trust, and that the "EU is working for us". For the ones that viewed them negatively, the adverts were associated with notions such as distrust.

**Prompted recall of adverts**

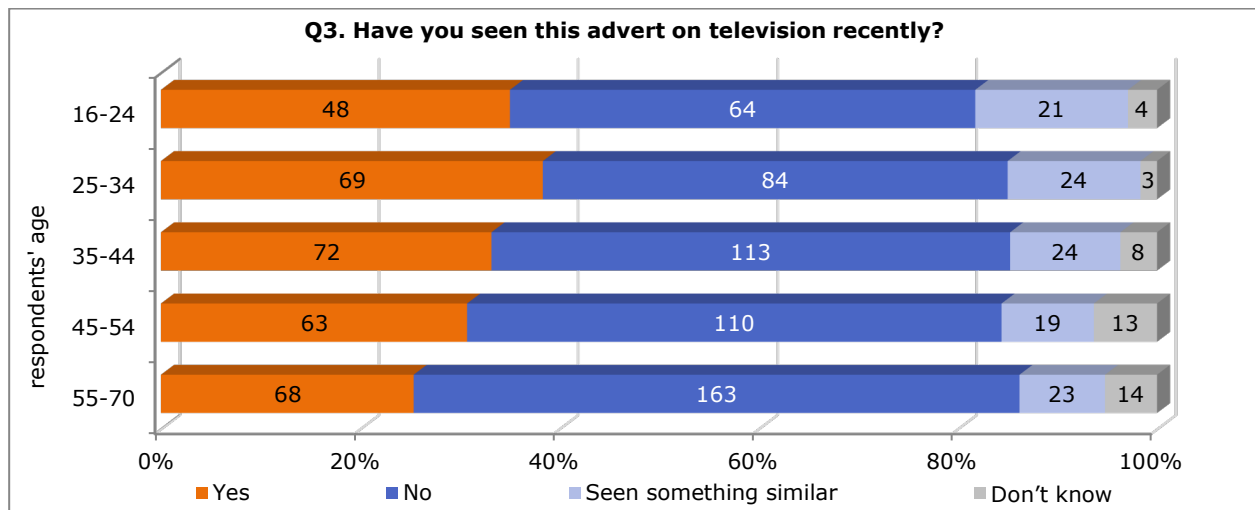
The third question relates to the whether participants had seen the Entrepreneurship (Marta from Porto) advert on television.

**Figure 112: Visually prompted recall of the adverts in Portugal**



The figure above reveals that the majority of respondents (53%) indicated that they had not seen any recent adverts around the theme of 'European Union: working for you'. However, 32% of respondents indicated that they had seen the adverts, 11% indicated that they had seen something similar, and 2% did not know. Even if we consider that there is a high likelihood that those who indicated that they had seen something similar had seen one or two of the other adverts shown in Portugal, from this survey circa one third of respondents had seen the ads. The level of consistency of this response with unprompted recall seems to confirm that those who saw the advert remembered it.

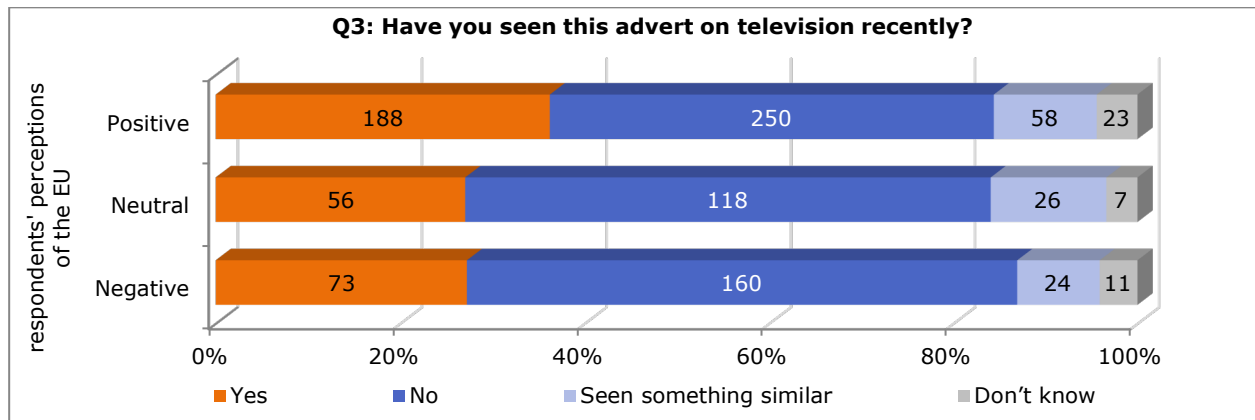
**Figure 113: Visually prompted recall of the adverts in Portugal, per age group**



A further breakdown of the results according to the age of respondents shows that respondents aged 25-34 were proportionately the most likely to have seen the adverts on television with 38% of respondents having indicated that this had been the case. Conversely, respondents aged 55-65 were the least likely to have seen the adverts with 61% of respondents indicating that this had been the case.



**Figure 114: Visually prompted recall of the adverts in Portugal, per perceptions of the EU**

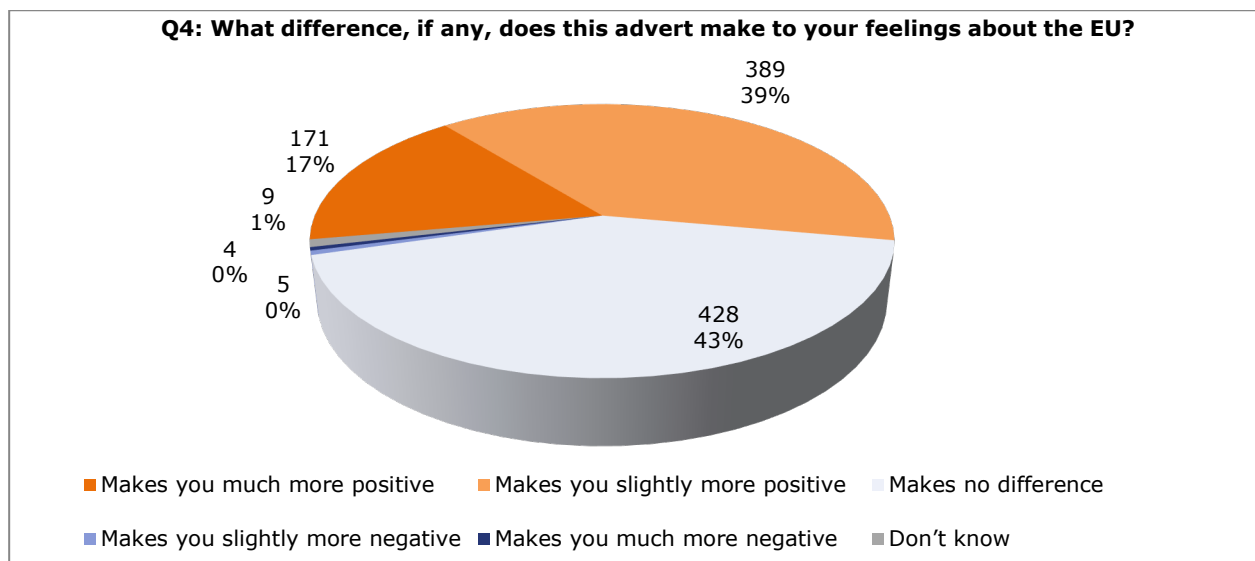


Finally, 36% of respondents with a positive image of the EU indicated that they had seen the advert on television, compared with 27% for respondents with a positive or neutral image of the EU. Conversely, 48% of respondents with a positive image indicated that they had not seen the advert, as opposed to 60% of respondents with a negative view, and 57% of respondents with a neutral view.

### **Advert's impact on feelings towards the EU**

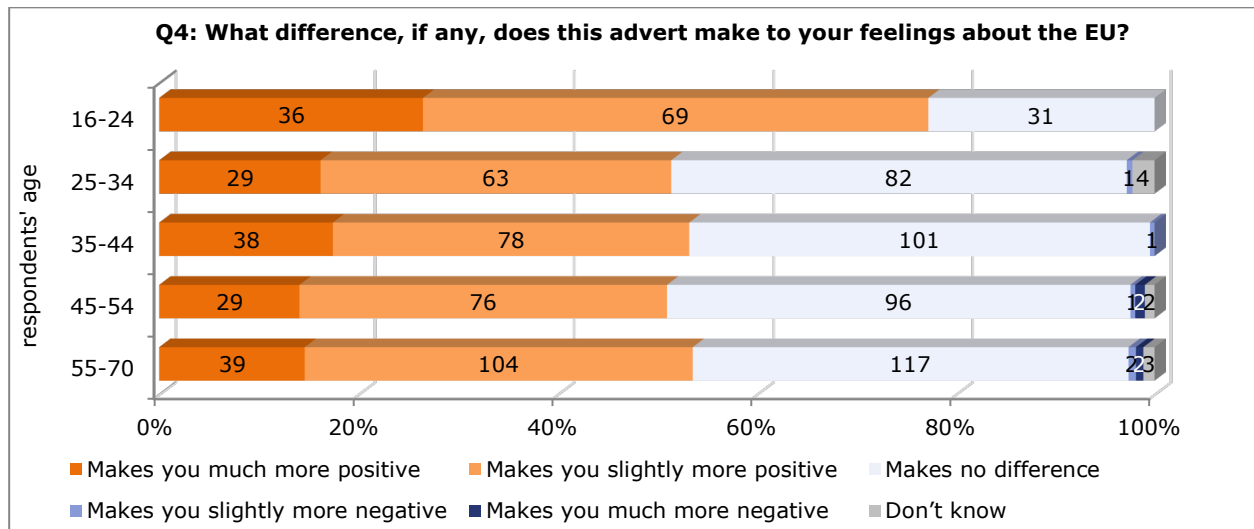
The fourth question relates to the advert's impact on feelings towards the EU.

**Figure 115: Advert's impact on feelings towards the EU in Portugal**



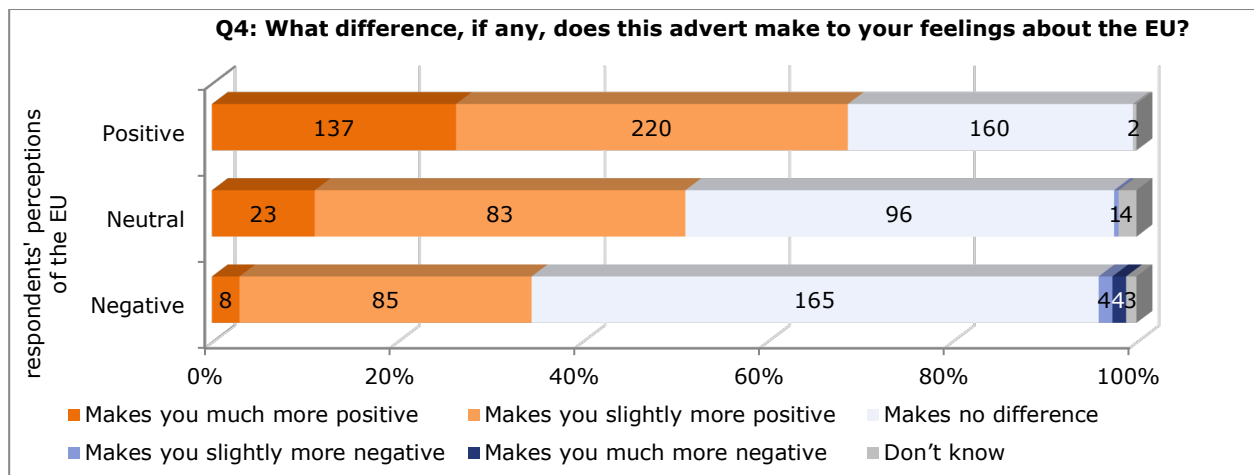
The results show that 56% of respondents indicated that the advert had made them more positive about the EU, whereas only 1% indicated that it made them feel less positive. The advert therefore had a 'net positive' impact of 55%. Finally, 43% of respondents indicated that the campaign made no difference on their feelings about the EU.

**Figure 116: Advert's impact on feelings towards the EU in Portugal, per age group**



A further breakdown of the results according to the age of respondents shows that **77% of respondents aged 16-24 indicated that the campaign had had a positive influence on their feelings about the EU**, compared to 53% of respondents aged 35-44 and 55-70, and 51% for respondents aged 25-34 and 45-54. Only 2% of respondents aged 55-70 and 1% of respondents aged 45-54 indicated that the advert had had a negative impact on their feelings about the EU.

**Figure 117: Advert's impact on feelings towards the EU in Portugal, per perceptions of the EU**

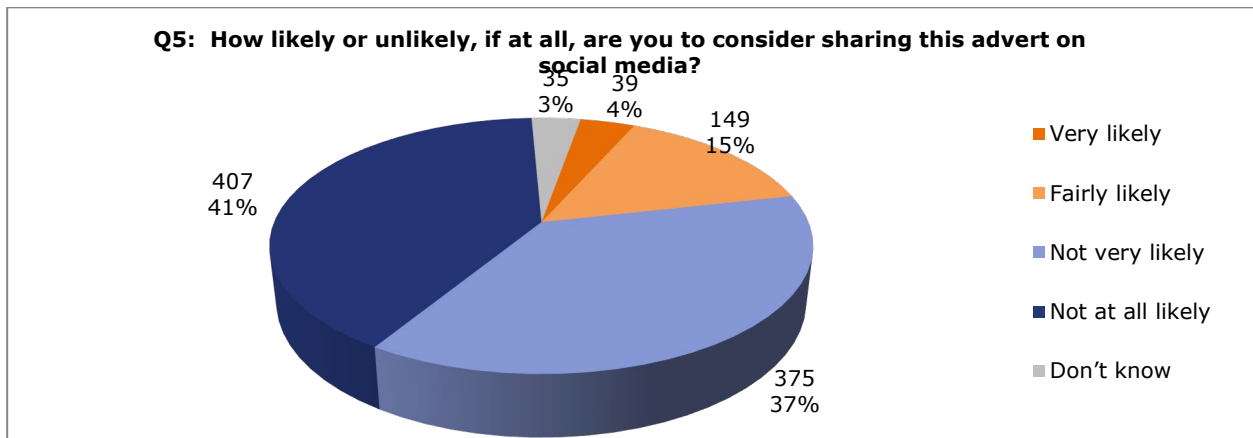


Finally, the figure above reveals that the advert had the most impact on people with a positive image of the EU. As such, 69% of respondents with a positive image of the EU indicated that this advert made them more positive about the EU, compared with 51% for people with a neutral image and 34% for people with a negative view. Nonetheless, it is important to note that the advert managed to elicit positive change across all types of opinion.

### **Advert and the social media**

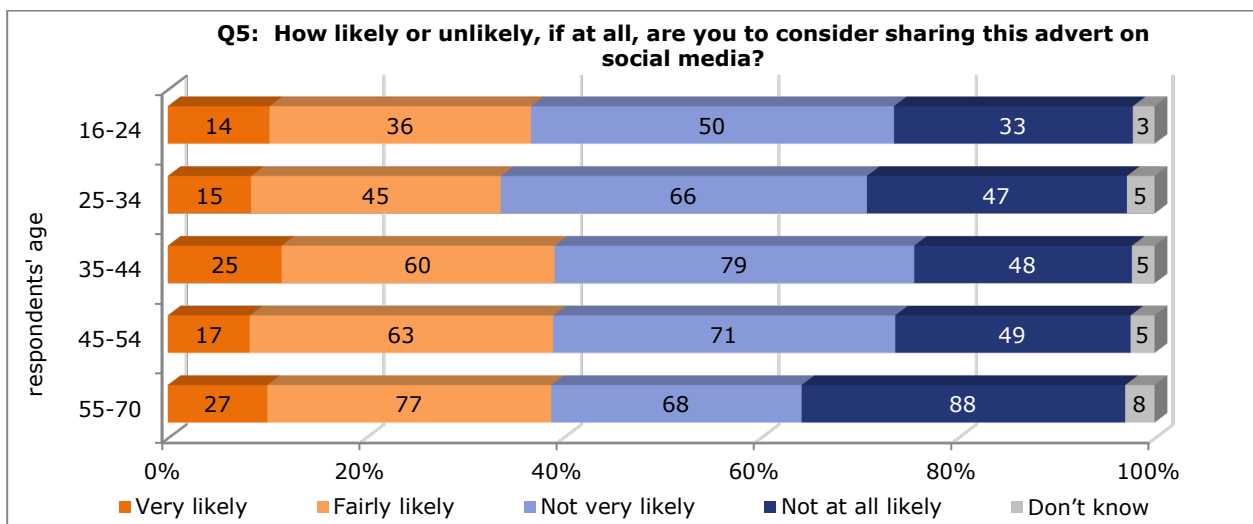
The fifth question relates to the likeliness of respondents sharing the advert on social media, whereas the sixth question relates to the use of social media to follow, get information about, discuss, etc. public policy, social and/or political issues.

**Figure 118: Reported likelihood of sharing the advert on social media in Portugal**



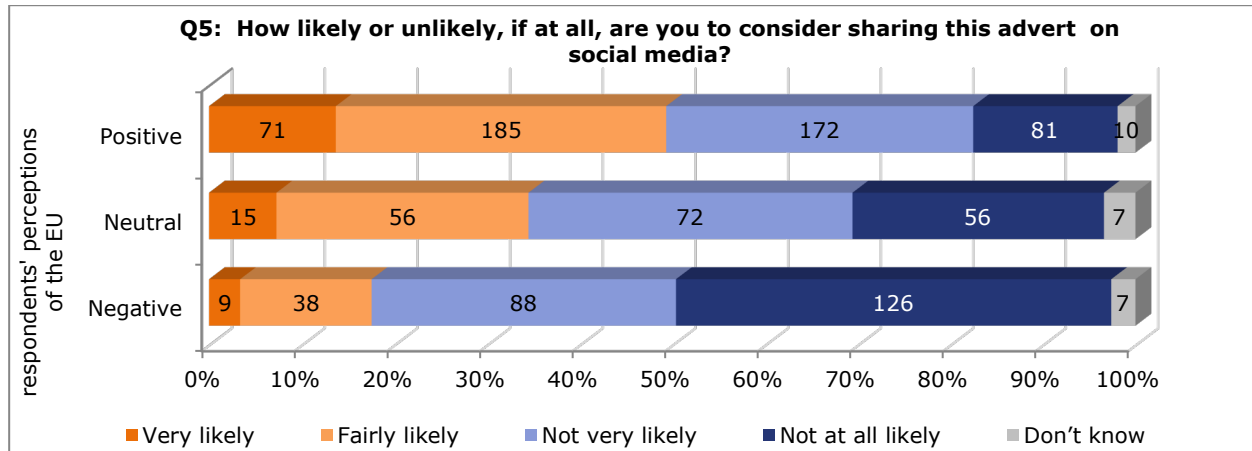
Most people would not share the advert on social media. The figure above reveals that 19% of respondents would be likely – very likely for 4% of respondents to share the advert on social media. Conversely, 78% of respondents indicated that it was not very likely that they would share the advert on social media.

**Figure 119: Reported likelihood of sharing the advert on social media in Portugal, per age group**



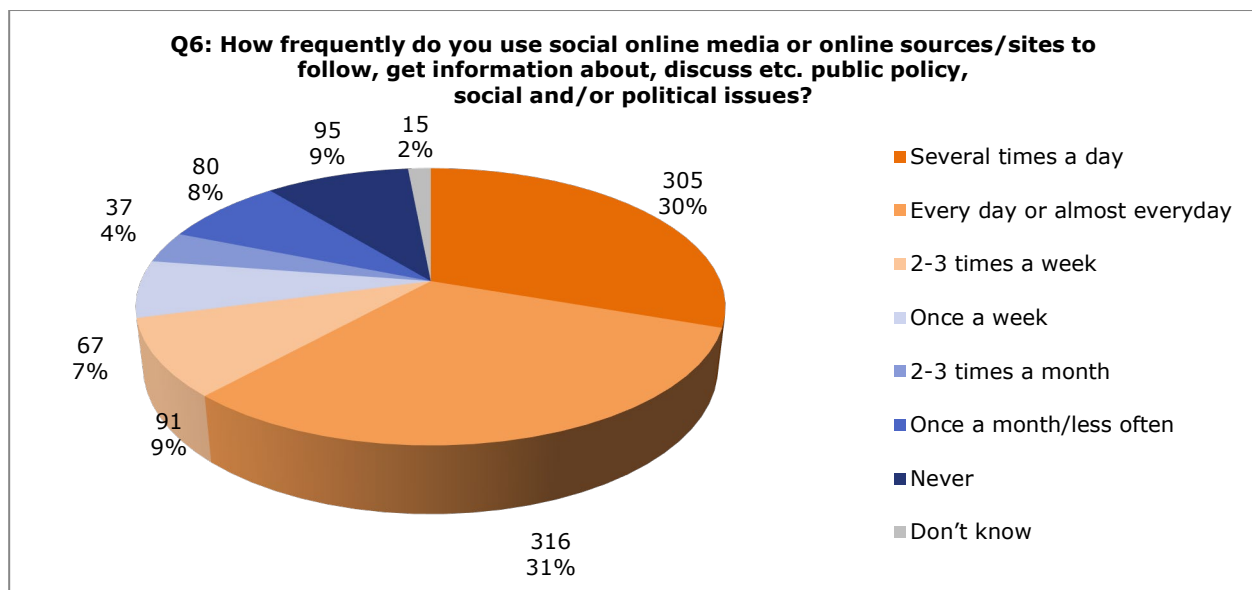
A further breakdown of the results according to the age of respondents shows relatively little difference between the responses of different age groups. Thirty-nine per cent of respondents aged 34-44, 45-54 and 55-70 would be likely to consider sharing this advert on social media, compared to 37% for respondents aged 16-24 and 34% for respondents aged 25-34.

**Figure 120: Reported likelihood of sharing the advert on social media in Portugal, per perceptions of the EU**



Finally, the results of the survey show that respectively 49%, 35% and 18% of respondents with a positive, neutral and negative opinion would be likely to share this advert on social media, whereas 49%, 62% and 80% of respondents indicated that it was unlikely that they would do so.

**Figure 121: Use of social media in Portugal**



The survey revealed that 30% of respondents use social media to follow, get information about, discuss etc. public policy, social and/or political issues several times a day, whereas 31% of respondents use social media every day or almost every day, and 9% of respondents use social media 2-3 times a week. Finally, the results also showed that 9% of respondents never use social media for this purpose.

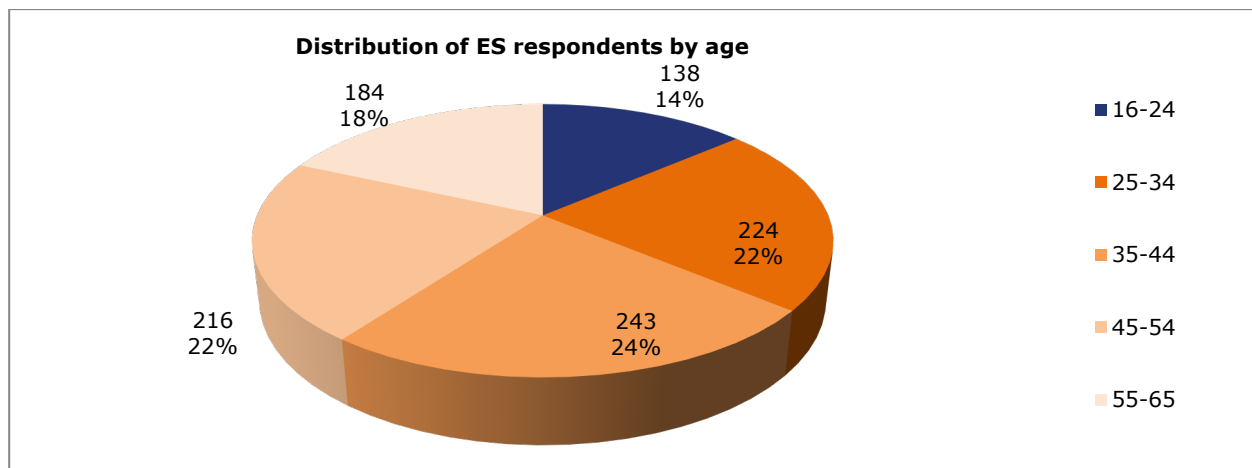
### 3.6 Spain

The omnibus survey in Spain was carried out on the 30<sup>th</sup> of January, the last Friday of the TV campaign.

#### 3.6.1 Spain respondents' profiles

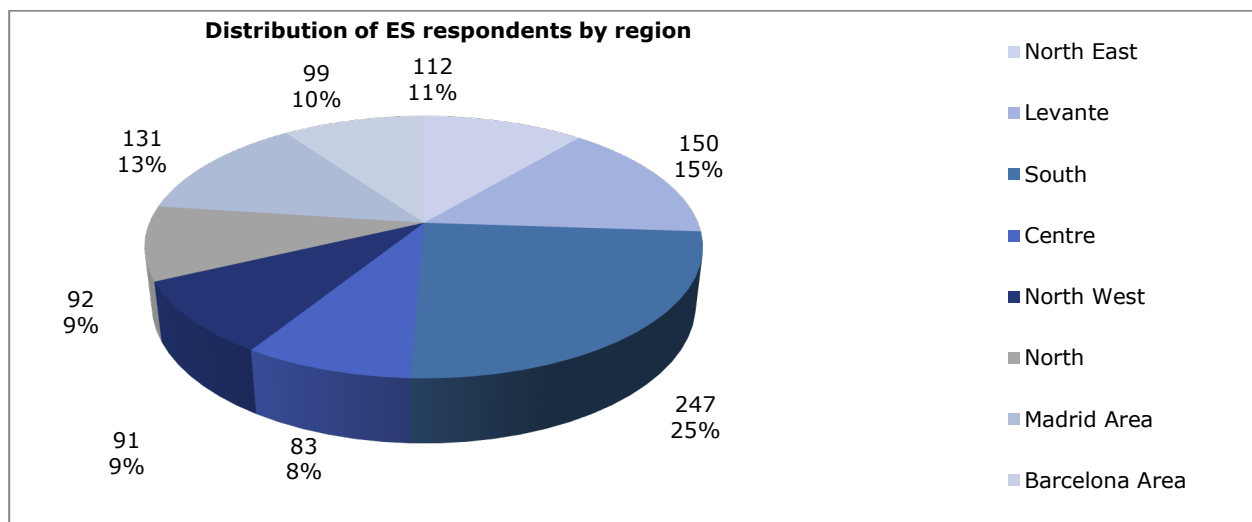
This section provides a description of the profiles of the 1005 respondents to the survey in Spain, according to their age, region of residence, employment status and education level.

**Figure 122: Age distribution of Spanish respondents**



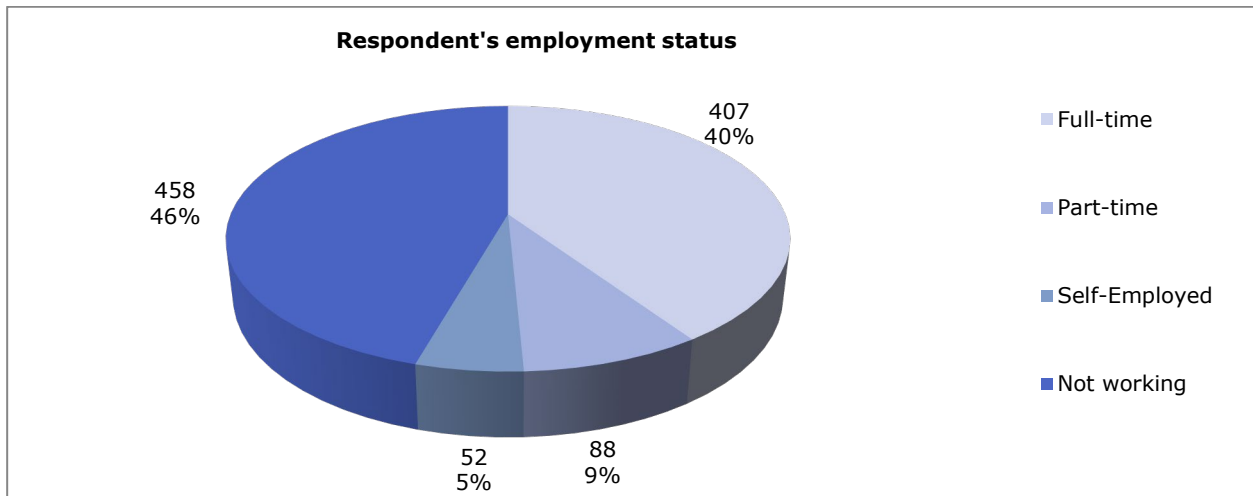
Respondents aged 35-44 accounted for the largest share of respondents, with 25% of respondents indicating that they belong to this age category, as shown in the figure above. Respondents aged 25-34 and respondents aged 45-54 represented the second largest share, accounting for respectively 22% and 21% of respondents, followed by respondents aged 55-65, and 16-24, which accounted for respectively 18% and 14% of respondents. Respondents within the target age group of the pilot, which is 25-70, therefore accounted for 86% of respondents.

**Figure 123: Regional distribution of Spanish respondents**



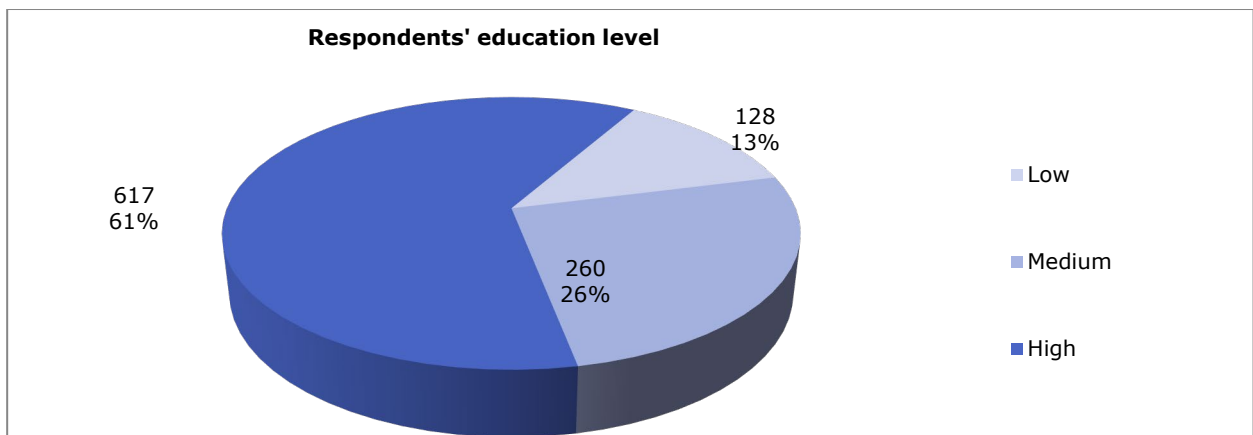
Respondents from the Southern region represented the largest share of respondents, as they accounted for 25% of total respondents, followed by respondents from the Levante region, and the Madrid Area, which accounted for respectively 15% and 13% of respondents, as shown in the figure above.

**Figure 124: Employment status of Spanish respondents**



The figure above reveals that a small majority of respondents were in some form of employment. Meanwhile, 46% of respondents indicated that they were not working. This group is likely to include students, family carers, pensioners and those registered unemployed.

**Figure 125: Education level of Spanish respondents**



Respondents having completed a higher education level (a university degree) accounted for the largest share of respondents, with 61% of respondents indicating that this was their education level, as shown in the figure above. Respondents having completed a medium level of education (upper level of secondary education) represented the second largest share, accounting for 26% of respondents, followed by respondents having completed a low education level (primary and lower level of secondary education), which accounted for 13% of respondents.

### 3.6.2 Key findings from the omnibus survey in Spain

A number of key findings can be drawn from the survey. These are:

- **In our survey, the greatest proportion of respondents (41%) expressed neutral feelings about the EU,** confirming the appropriateness of the choice of Spain as a target country for the campaign.
- **Meanwhile, the EU conjures up positive image for 32% of respondents, particularly for respondents aged 35-44 and respondents aged 55-65.** A slight difference can be observed with the 3<sup>rd</sup> wave Eurobarometer data as the number of respondents with a positive image of the EU has increased by 1 percentage point;
- Before being shown the advert, **most people (68%) reported that they had not seen any EU adverts on the TV.** Circa one in five respondents **(22%) of respondents indicated that they had.** Those most likely to see the adverts on TV were those aged 25-34 and 35-44.
- In Spain, respondents with a positive or negative image of the EU were more likely to take note of EU adverts when they came on TV.
- When shown the advert Green jobs (Elena from Madrid), **circa a quarter of respondents (26%) indicated that they had actually seen the advert on TV.** When this number is added to those who indicated that they had seen something similar, circa one in three people **(32%) did see EU adverts in Spain.** , and particularly respondents aged 25-34, and respondents with a positive image of the EU;
- Although the **majority of respondents (61%) indicated that the advert made no difference to their feelings** about the EU, for nearly **one in three respondents (32%) seeing the advert made them feel more positive** about the EU.
- **Most respondents would not share the clip on social media, but 19% of respondents would be likely to share it.** Interestingly those most likely to share are respondents aged 55-65.

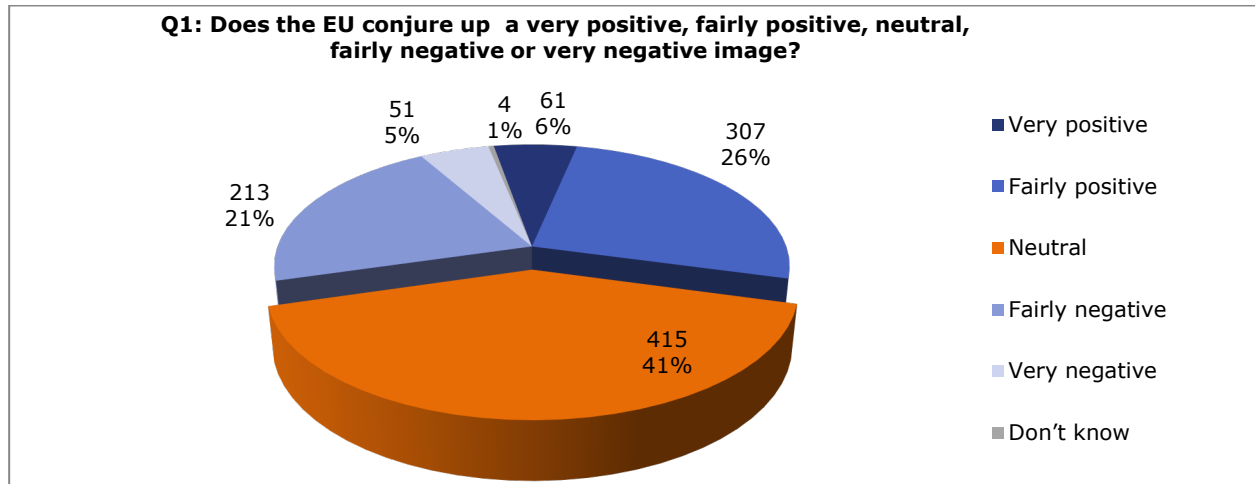
### 3.6.3 Omnibus survey results for Spain

This section provides the results of the questions asked to the respondents of the survey, as outlined in the introduction to this section.

#### Perceptions of the EU

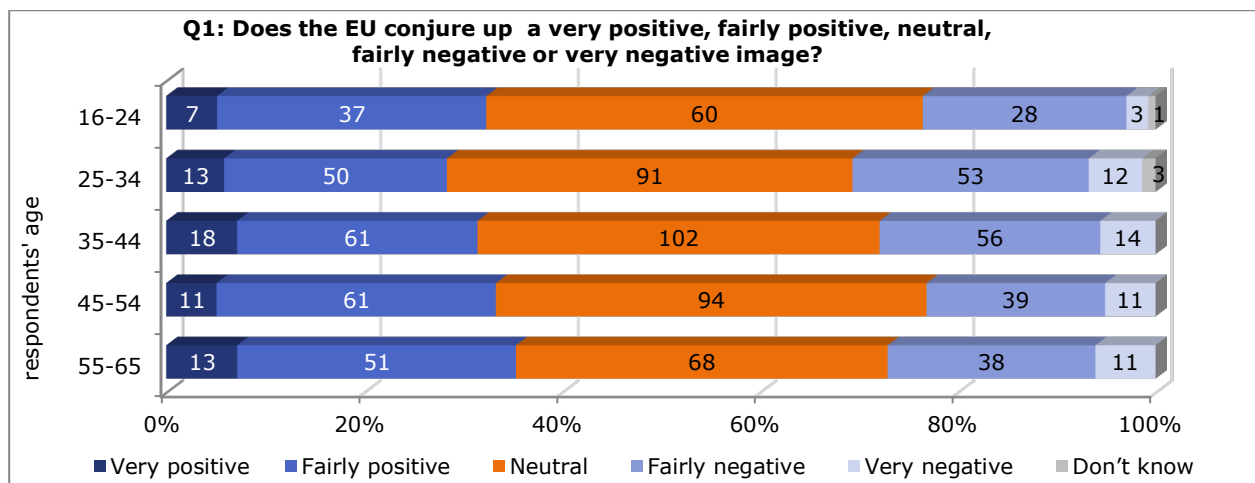
The first question related to the perception that respondents to the survey have of the EU.

**Figure 126: Image of the EU in Spain across all respondents**



The EU conjures up a neutral image for 41% of respondents to the survey in Spain, whereas it conjures up a fairly positive image for 26% of respondents, and fairly negative for 21% of respondents, as shown in the figure above. Overall, the EU conjures up a positive image for 32% of respondents, and a negative image for 26% of respondents. Compared with the 3<sup>rd</sup> wave Eurobarometer data, the number of respondents with a very positive image of the EU is higher by 4 percentage points, the number of respondents with a fairly positive image of the EU is lower by 3 percentage points, whereas the number of respondents with a neutral image of the EU is lower by 5 percentage points, down from 46%. Overall, the number of respondents with a positive image of the EU is higher than the last Eurobarometer study by 1 percentage point.

**Figure 127: Image of the EU in Spain, per age group**



A further breakdown of these results per age category, as shown in the figure above, reveals that 44% of respondents aged 16-24 and 45-54 have a neutral image of the EU, followed by 45% of respondents aged 45-54, 41% of respondents aged 25-34 and 35-44, and 38% of respondents aged 55-65.

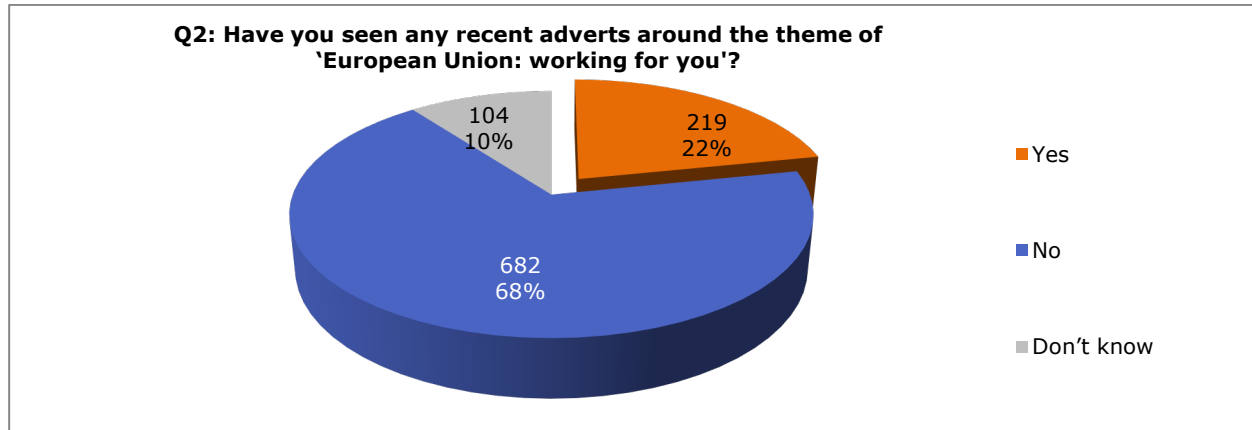


Respondents aged 35-44 and respondents aged 55-65 have the most positive view of the EU, view 7% of respondents in both cases indicating that the EU conjured up a very positive image. Overall, only the majority of respondents aged 25-34 had a negative image of the EU.

**Unprompted recall of adverts**

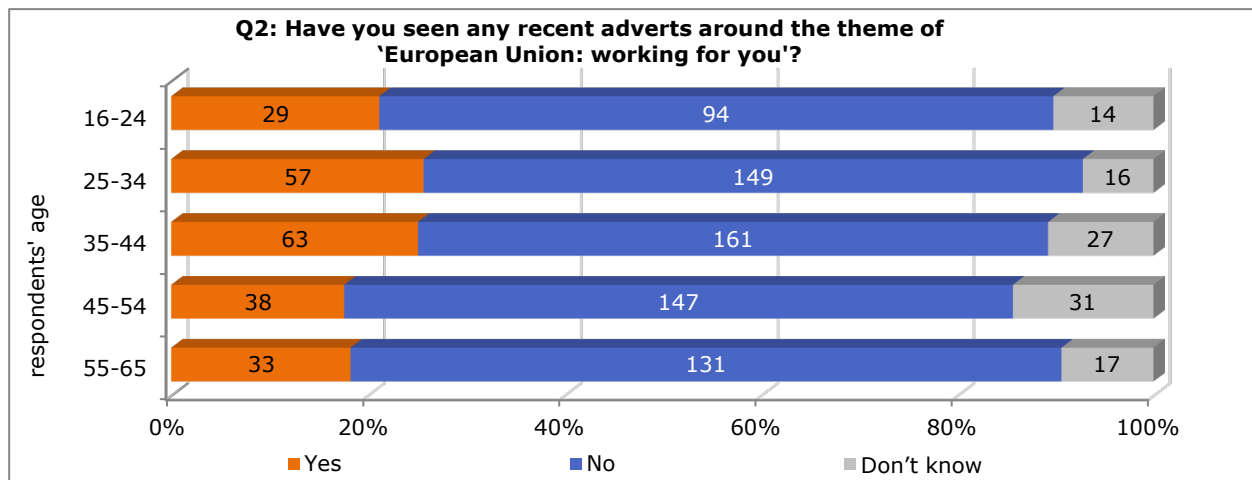
The second question relates to the whether participants recalled the adverts.

**Figure 128: Visually unprompted recall of the adverts in Spain**



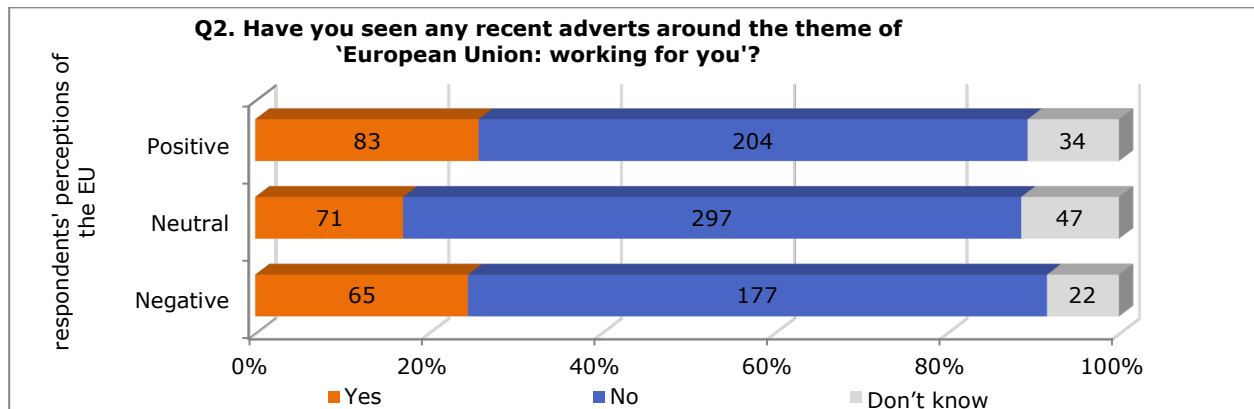
The figure above reveals that the majority of respondents indicated that they had not seen any recent adverts around the theme of 'European Union: working for you', with 68% of respondents indicating that this had been the case. However, 22% of respondents indicated that they had seen the adverts, and 10% indicated that they did not know.

**Figure 129: Visually unprompted recall of the adverts in Spain, per age group**



A further breakdown of the results according to the age of respondents shows that respondents aged 25-34 and 35-44 were the most likely to have seen the adverts with respectively 26% and 25% of respondents having indicated that they had seen the adverts, as opposed to 21%, 18% and 18% for respondents respectively aged 16-24, 45-54 and 55-65.

**Figure 130: Visually unprompted recall of the adverts in Spain, per perceptions of the EU**



The figure above reveals that respondents with a positive image of the EU were the ones that indicated that they had most seen the adverts, with 26% indicating that this had been the case, as opposed to 25% for respondents having a negative image of the EU, and 17% of those with a neutral view. This result suggests that in Spain those with more definite views are actually more likely to take note of information about the EU than those, who feel neutral, suggesting that this later group are in fact harder to reach.

The survey participants who indicated that they have seen the advert were asked two **additional open questions**, namely:

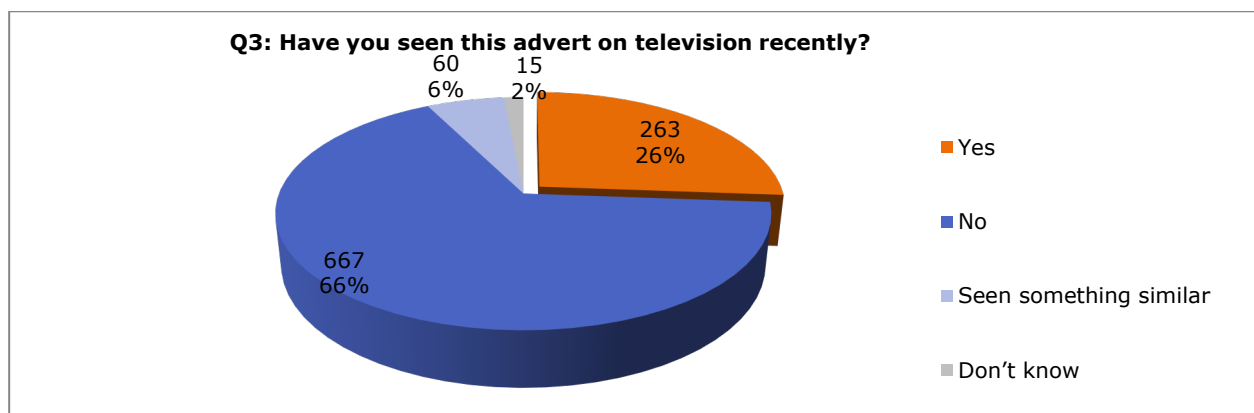
- What did you see/hear in the advertising?
- What else did the advertising tell you?

A great proportion of the respondents to the open questions (174 out of 219) seemed to have remembered the adverts rather well, either quoting the campaign slogan or describing the adverts' themes (support for green jobs, opportunities for youth, helping SMEs). This helps to ascertain that the results of unprompted recall did relate to the actual campaign to a good extent. For respondents that had seen the adverts, and viewed them negatively, the advert was associated with notions such as propaganda, over-promising and distrust.

### **Prompted recall of adverts**

The third question relates to the whether participants had seen the Green jobs (Elena from Madrid) advert on television.

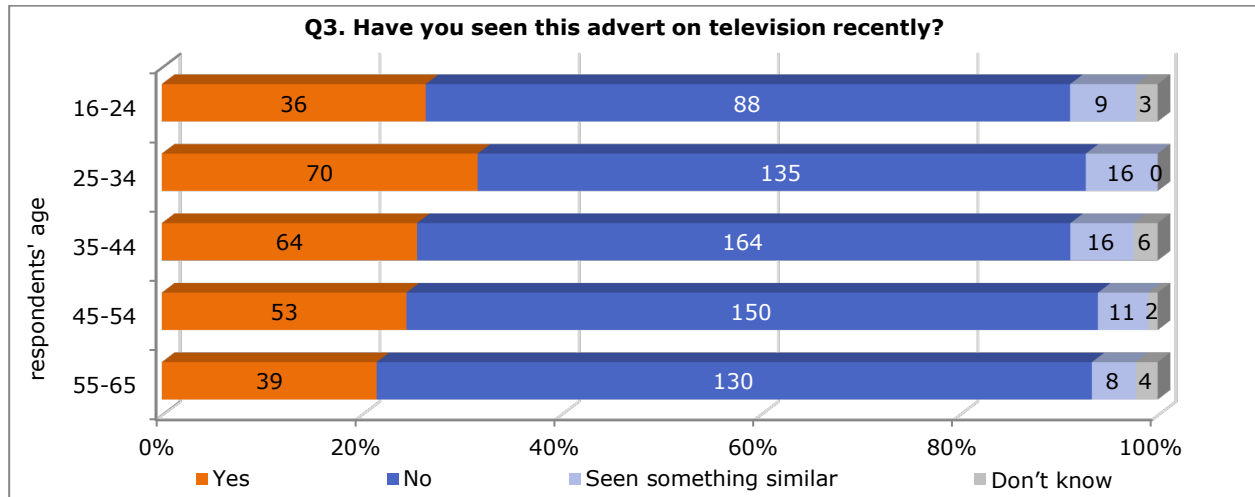
**Figure 131: Visually prompted recall of the adverts in Spain**



The figure above reveals that the majority respondents indicated that they had not seen any recent adverts around the theme of 'European Union: working for you', with 66% of respondents indicating that this has been the case. However, 26% of respondents indicated

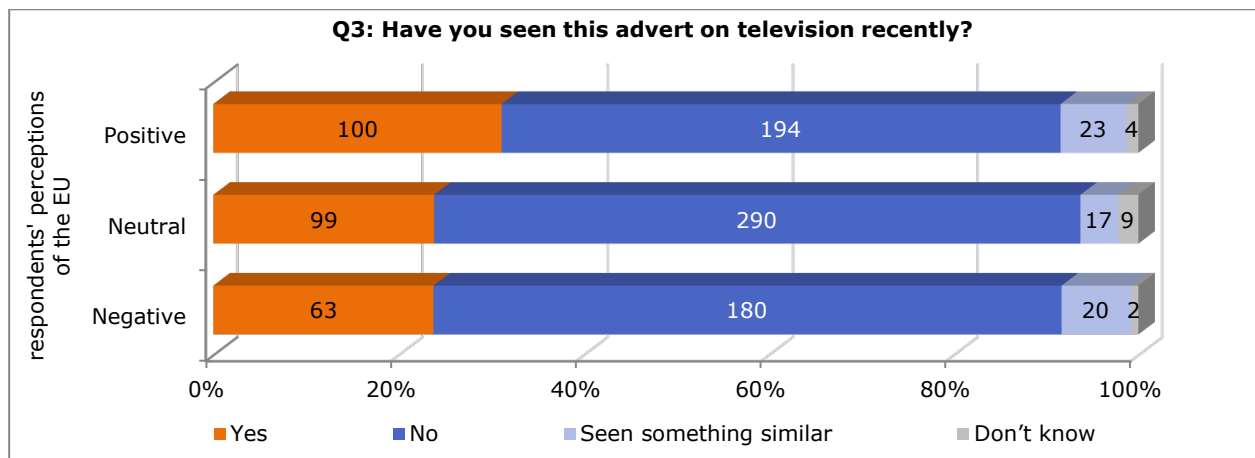
that they had seen the adverts, 6% indicated that they had seen something similar, and 2% did not know. This suggests that between one in four and one in three people had seen the adverts in Spain.

**Figure 132: Visually prompted recall of the adverts in Spain, per age group**



A further breakdown of the results according to the age of respondents shows that respondents aged 25-34 were proportionately the most likely to have seen the advert on television with 32% of respondents having indicated that this had been the case. Conversely, respondents aged 55-65 were the least likely to have seen the advert with 72% of respondents indicating that this had been the case.

**Figure 133: Visually prompted recall of the adverts in Spain, per perceptions of the EU**

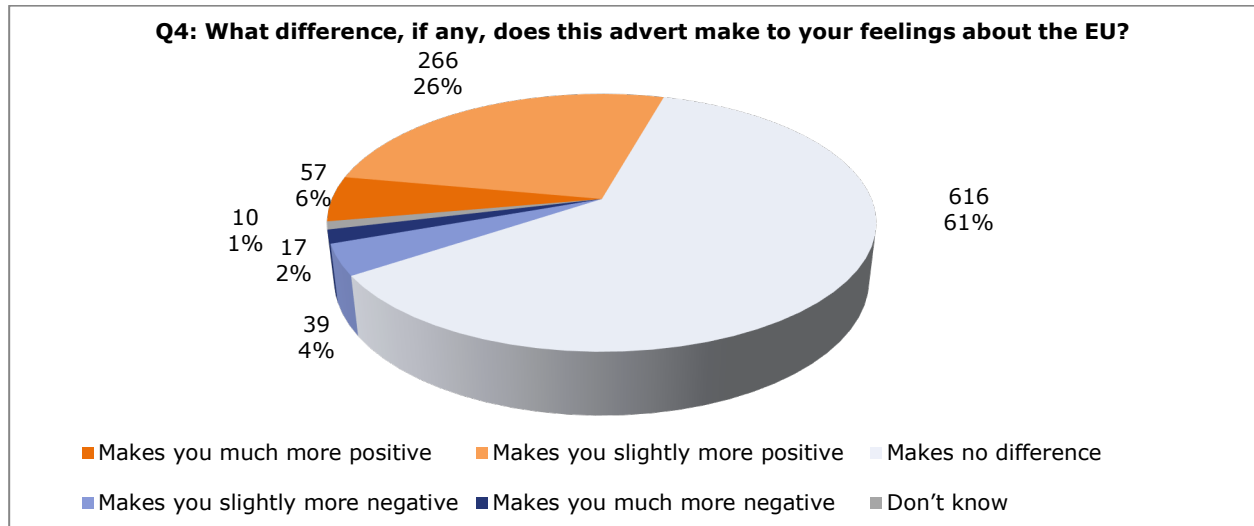


Finally, 70% of respondents with a neutral image indicated that they had not seen the advert on television, as opposed to 68% for respondents with a negative image and 60% for respondents with a positive image. The figure above also shows that respondents with a positive image of the EU were the most likely to have seen the advert, with 31% indicating that this had been the case, compared with 24% for both respondents with a neutral or negative view of the EU. This result corresponds to the responses to the unprompted recall, which suggest that it is harder to get the attention of those who feel neutral in Spain.

### Advert's impact on feelings towards the EU

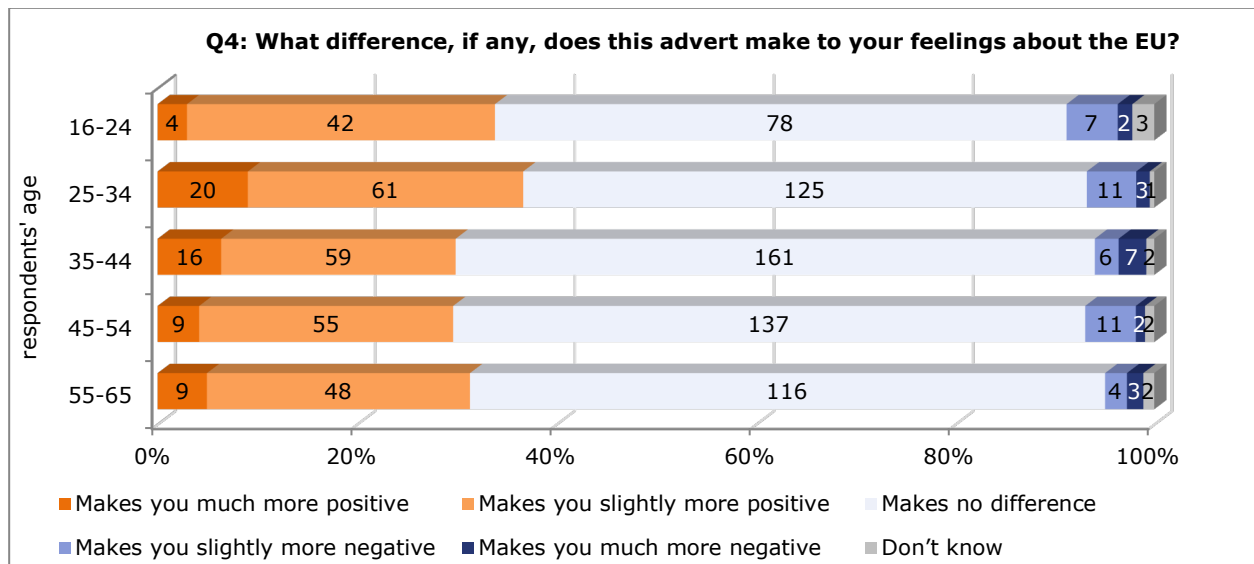
The fourth question relates to the advert's impact on feelings towards the EU.

**Figure 134: Advert's impact on feelings towards the EU in Spain**



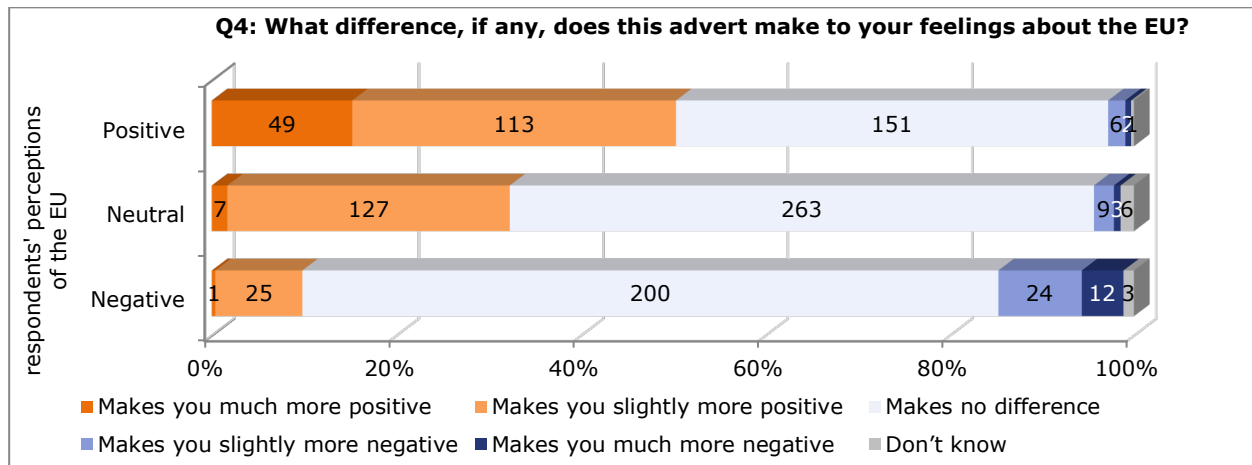
The majority of respondents (61%) indicated that the advert made no difference on their feelings about the EU. However, nearly 1 in 3 respondents (32%) indicated that it made them more positive about the EU, whereas 6% indicated that it made them feel less positive. In conclusion, the advert had a 'net positive' impact of 27%.

**Figure 135: Advert's impact on feelings towards the EU in Spain, per age group**



A further breakdown of the results according to the age of respondents shows that 37% of respondents aged 25-34 indicated that the campaign had had a positive influence on their feelings about the EU. This group felt most positive of all the age groups. This result compares to respectively lower results of 34%, 31%, 30% and 30% for respondents aged 16-24, 55-65, 35-44 and 45-54.

**Figure 136: Advert's impact on feelings towards the EU in Spain, per perceptions of the EU**

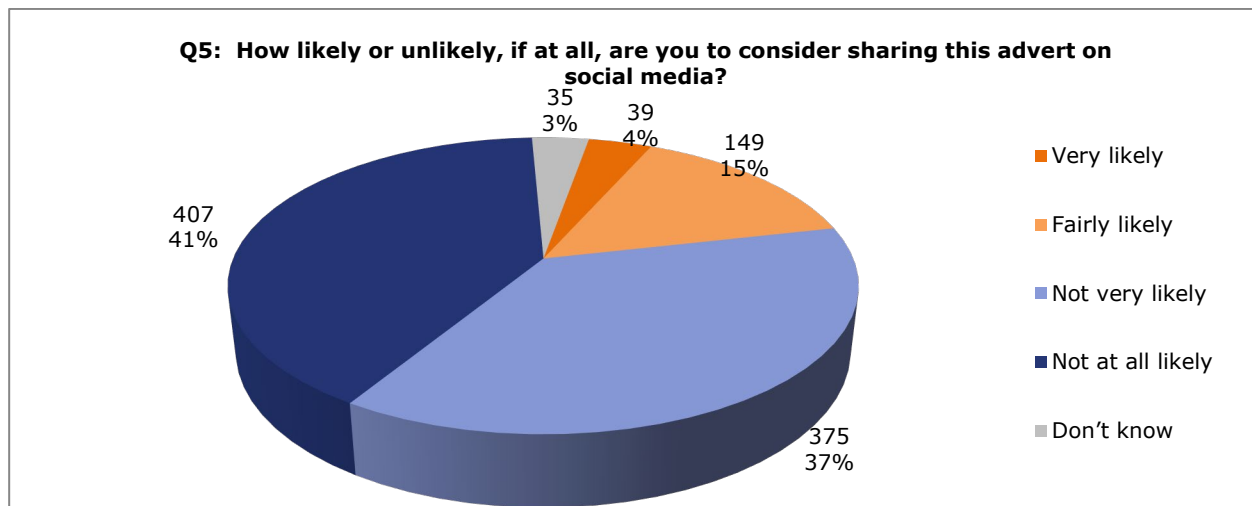


Finally, the figure above reveals that the advert had the most impact on people with a positive image of the EU. As such, 32% of respondents with a positive image of the EU indicated that this advert made them more positive about the EU, compared with 16% for people with a neutral image and 6% for people with a negative view. In comparison with responses to earlier questions, this result suggests that whilst it is difficult to get the attention of those who feel neutral, the advert does have a somewhat positive impact on feeling about the EU for one in three of this group.

### **Advert and the social media**

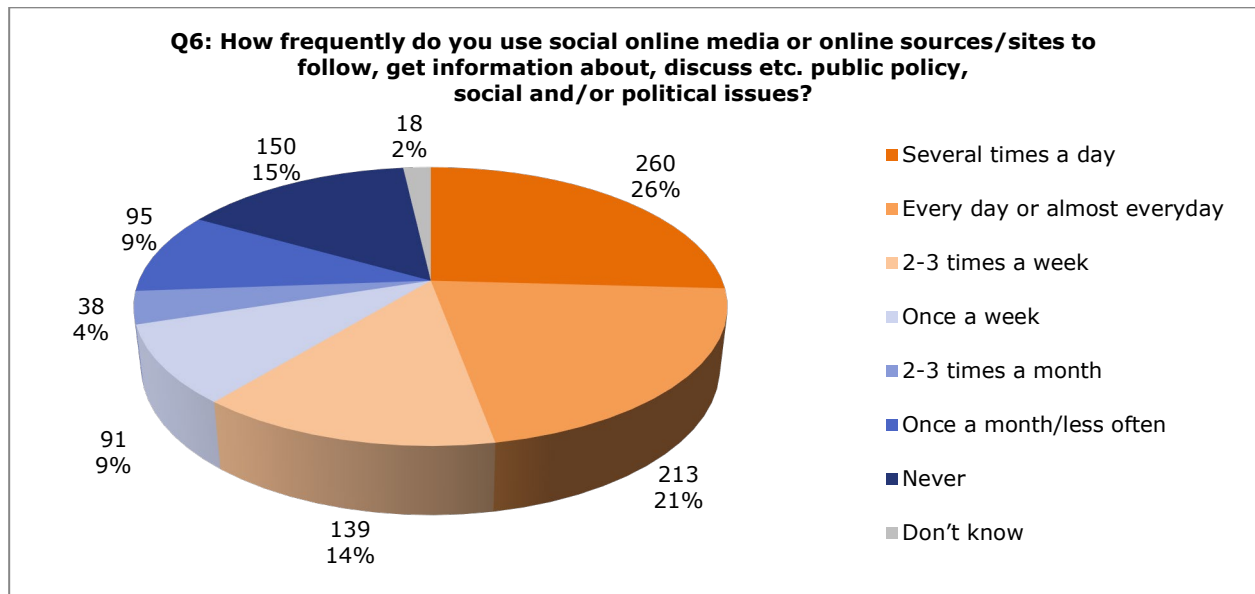
The fifth question relates to the likeliness of respondents sharing the advert on social media, whereas the sixth question relates to the use of social media to follow, get information about, discuss, etc. public policy, social and/or political issues.

**Figure 137: Reported likelihood of sharing the advert on social media in Spain**



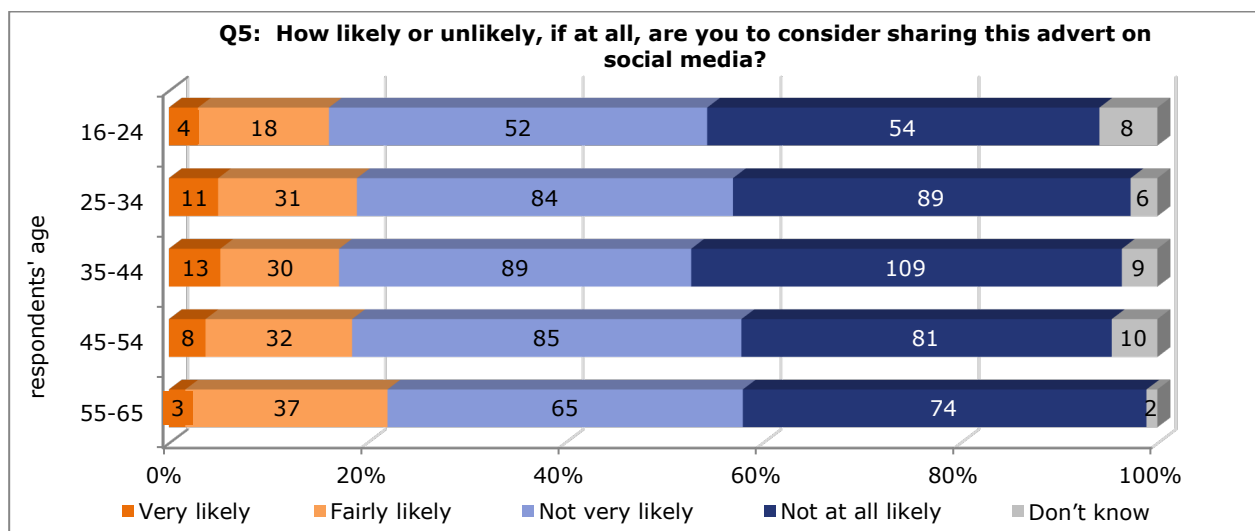
The figure above reveals that 19% of respondents would be likely – very likely for 4% of respondents and fairly likely for 15% of respondents – to share the advert on social media. Conversely, 78% of respondents indicated that it was not very likely that they would share the advert on social media. Most people would not share this advert on social media in Spain.

**Figure 138: Use of social media in Spain**



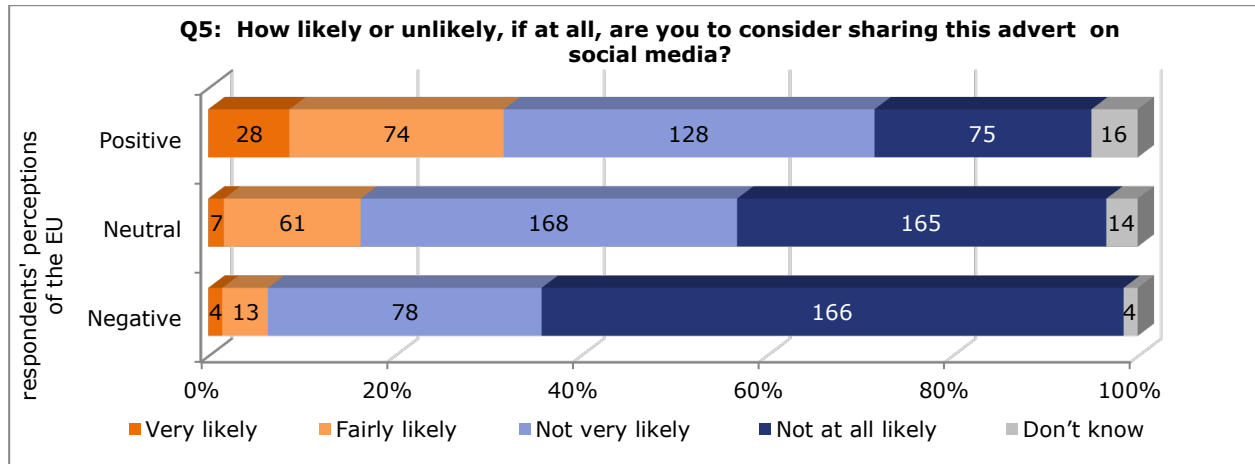
To put the above data into context, the above chart provides details of social media habits. The results revealed that 26% of respondents use social media to follow, get information about, discuss etc. public policy, social and/or political issues several times a day, whereas 21% of respondents use social media every day or almost every day, and 14% of respondents use social media 2-3 times a week. Finally, the results also showed that 15% of respondents never use social media.

**Figure 139: Reported likelihood of sharing the advert on social media in Spain, per age group**



Converse to any preconceptions about older generations, in Spain it appears to be the older generation of respondents (55 – 65) who would be most likely (22%) to consider sharing this advert on social media. This result compares with 19% of respondents aged 45-54 and 25-34, 17% of respondents aged 35-44, and 16% of respondents 16-24.

**Figure 140: Reported likelihood of sharing the advert on social media in Spain, per perceptions of the EU**



Finally, the results of the survey show that respectively 32%, 16% and 6% of respondents with a positive, neutral and negative perception of the EU would be likely to share this advert on social media. This is a small, but positive outcome given the potential for further sharing. Conversely, respectively 63%, 80% and 92% of respondents with a positive, neutral and negative perception of the EU indicated that it was unlikely that they would do so.