

Monitoring/Evaluation of the #InvestEU campaign

Final Report of the study ‘Monitoring the performance of EC communication activities for the Investment Plan for Europe’



Monitoring/Evaluation of the #InvestEU campaign

Final Report of the study 'Monitoring the performance of EC communication activities for the Investment Plan for Europe'

technopolis _{|group|} November 2018

Bea Mahieu

Hywel Jones

Rebecca Allinson

Astrid Henningsen

Alexandre Lotito

Carolina Spaini

Apolline Terrier

Executive Summary

This is the final report of the study evaluating the first year of the #InvestEU campaign implementation, i.e. from March 2017 to March 2018.

The evaluation was conducted by Technopolis and its partners Ipsos Mori and Henningsen Consulting between January and September 2018. The objective was to assess the relevance, effectiveness, efficiency, coherence, EU added value and sustainability of the #InvestEU campaign in its first year of activity, with a specific focus on the campaign implementation in the 16 zoom-in countries. Recommendations were to be formulated for each evaluation criterion.

In line with the theory-based approach to monitoring and evaluation activities set out in the EC Better Regulations and its Toolbox, the monitoring and evaluation activities were based upon an analysis of the #InvestEU campaign objectives, mapped out in an intervention logic.

A mix of qualitative and quantitative methods were deployed, including two waves of polling (complementing three waves of polling by the campaign contractor), statistical analysis of monitoring and polling data, web analytics, secondary data analysis (Eurobarometer and Eurostat data), desk research, 148 interviews, 18 focus groups, and seven case studies.

BACKGROUND TO THE CAMPAIGN

The #InvestEU campaign is an EC corporate communication campaign, conducted by DG Communications (DG COMM). It is focused on the message that the EU responds to key socio-economic challenges and acts as a catalyst boosting the local economy and (jobs, new business prospects, improved services, modernised infrastructure, etc.). A major driver for the campaign was the perceived decrease in support for the EU among European citizens and their limited awareness of the role the EU is playing to speed up the creation of jobs and growth.

The campaign was part of an “**information and communication sequence**” on the Investment Plan, launched in 2016, whereby the first part of this sequence targeted investors and the business community. The #InvestEU campaign was intended to convey the message to the European citizens.

The overarching objective was to improve public awareness and knowledge of how funding by the EU contributes to the creation of jobs and growth. As such the campaign had two main expected impacts:

- An enhanced awareness and knowledge of the positive contribution to job creation, growth and investment made by EU funding - in the EU overall, nationally and locally
- A restored positive perception of the EU as a central part of the solutions to the challenges Europe faces today

The campaign strategy was designed based on evidence collected from a number of initiatives, including the evaluation of a pilot campaign and preparatory research based on Eurobarometer data.

THE #INVESTEU CAMPAIGN IMPLEMENTATION – STATE OF PLAY

The #InvestEU campaign was launched in March 2017. For its first year of activity it had an overall budget estimated at €20.7m. This overall campaign budget encompassed €16.5m (80% of the campaign budget) that was managed through a central contract, €2.5m (12%) that was available for the national EC Representations upon request, €797k (4%) allocated to EDICS following an open call, and a sum that was set aside for the organisation of Citizens’ Dialogues focused on the Investment Plan, which we estimated at €900k.

The campaign covered all 28 EU Member States but in order to avoid fragmentation of the relatively limited campaign budget, focused its efforts on a defined set of 16 ‘zoom-in’ countries that would constitute the core of the campaign (Austria, Belgium, Bulgaria, Germany, Greece, Spain, Finland, France, Hungary, Italy, Latvia, Netherlands, Poland, Portugal, Romania and Sweden).

It was designed as an **integrated campaign** that would take place at two levels: a centrally overseen pan-European campaign, integrated with campaigns at the national level in the 16 ‘zoom-in’ countries. It took a novel **‘semi-decentralised’** approach, with the EC Representations (REPs) ensuring relevance and credibility, and DG COMM taking up a coordinating role to ensure consistency. It therefore substantially built upon the knowledge of the local environment among the national EC Representations. They were “in the driving seats” for the design and implementation of the campaign in their countries, supported by the contractor’s local network, and with the ultimate approval of DG COMM.

The campaign was **‘multi-channel’**, combining owned, earned, shared and bought channels and managing these channels in an overall coherent manner. The approach was to build upon the existing owned channels at the EC central level and among the REPs, along with the already available resources and local knowledge in the REPs, to implement ‘owned’ communication and PR activities. This was to be combined with the services of a contractor (WPP), who was to focus on the ‘bought’ and ‘earned’ media coverage (including paid advertising and journalist-targeted actions). For the paid media channels, generating the large-scale reach of the campaign, the focus was on media channels where cost-efficient targeting was possible taking into account also the total budget available and the number of countries which were covered by the campaign. The central paid media strategy foresaw an allocation of about 45% of the budget on digital media advertising and about 30% on social media ads.

The mixed-media model underpinning the corporate campaign was to create a **synergy of paid and earned media**, in line with industry quality standards. A key objective was to promote the EC pages on social media and websites, driving earned and paid reach back to the EC’s owned channels. For this purpose, the micro-targeting strategy on social media foresaw for each project a two-step approach to the campaign implementation on the social media, i.e. an *awareness* phase followed by a *consideration phase*, which aimed to redirect qualitative audiences to the campaign website.

A key principle was that the communication mix would be **country-specific**, adapted and tailored to local circumstances and audiences, in order to optimise both the impact and the cost-efficiency of the campaign communication activities. The country-specific approach related also to the overarching narrative, which was translated into country-specific messages, adapted to the concerns and sensitivities of the citizens in the Member States in which the campaign was rolled out.

The storytelling was built around **exemplary newsworthy projects** that acted as examples of “real impact” on “real citizens” and were of potential relevance and appeal to the target audience in the country. Emblematic ‘flagship’ projects were selected to be showcased on all campaign channels, including the paid media.

In 2017-18, the campaign achieved the following outputs: in total **243 projects** were showcased, based on an assessment of over 520 projects. In total **more than 7,500 paid advertising items** were produced, ranging from billboards and print insertions to posts on social media and online/digital ads. These paid advertising activities were complemented with paid collaborations with media, most often in the form of online advertorials and TV infomercials. The REPs in the 16 ‘zoom-in’ countries organised a total of **232 events**. The REPs’ outreach activities were complemented by InvestEU-specific projects implemented by **67 Europe Direct Information Centres (EDIC)** and were supported by **51 ‘external’ third-party endorsers** – in addition to 32 project beneficiaries. Finally, nine cross-country press trips were organised involving a total of **167 journalists**.

ANSWERS TO THE EVALUATION QUESTIONS

Relevance of the campaign

The general opinion of the interviewees was that through its tailored approach and focus on the human aspect and the concrete benefits for the EU citizens, the #InvestEU campaign marked a **breakthrough and highly appreciated shift** in the EU communication to the citizens. A returning comment was that communication like this is needed in current times, and should be a continuous effort, not a one-off campaign.

In the InvestEU strategy, the relevance of the communication activities directly depended on the extent to which the campaign message and tailored narratives resonated with EU citizens. The alignment of the stories and the areas of benefits they showcased with the target audiences' areas of concerns, together with the quality of the campaign materials and the choice of communication channels used to convey the message were considered key influencing factors.

The Eurobarometer surveys in the period 2015-2017 indicate clearly that European citizens continued to be concerned about unemployment, and that they were also increasingly preoccupied by certain societal-oriented challenges such as the environment and especially, health and social security. The projects selected in the campaign were in alignment with these different areas of concern. In this context, the interviewees highlighted the importance of **flexibility in the choice of projects** shown in the #InvestEU campaign, where alignment with the national context had priority over coverage of specific EU investment funds. The campaign approach allowed the main narrative to be focused on related topics of interest such as innovation, support to education and skills training, projects in the field of healthcare or cultural projects, in countries where a more restricted focus on job creation was less adequate (e.g. the net contributing countries). Especially in the case of the flagship projects, in general the campaign reached an **optimal balance** in its coverage of projects that addressed issues in economic and other more societal challenge-oriented spheres, reflecting the areas of concern of the European citizen. The focus of the projects was well aligned with the country-specific concerns (based upon the 2017 Eurobarometer survey) in 11 out of the 16 zoom-in countries. It was less well-aligned though in Portugal, Hungary, Sweden, Italy and Spain.

In 11 out of the 16 zoom-in countries, the focus of the showcased projects was well aligned with the country-specific concerns as indicated in the 2017 Eurobarometer survey. Our analysis indicated a less positive balance in showcasing the benefits deriving from EU investments in the societal spheres in Portugal, Hungary, and Sweden. In Italy and Spain, one may have expected a stronger emphasis on benefits specifically related to unemployment and the economic situation in general, which were the citizens' strongest concerns.

The InvestEU campaign showed a more mixed result in relation to the alignment of the **campaign materials**. The results of the focus groups organised in zoom-in countries as part of this evaluation showed that in general, participants most appreciated the materials based on human success stories, which facilitated connection with the audience. They were positive also about materials with themes linked to topical or emotional issues such as youth unemployment and responded well to themes of national importance or related to investments directly benefitting the local community.

However, there were some issues with respect to the quality of some of the paid advertising materials, which was further confirmed during the interviews. In some cases, materials appeared targeted at government officials or business rather than the general public; an explicit focus on a single sector or individual was thought to make the communications feel too specific or specialist. Participants also felt that the videos often contained too little information, reducing their trust in the stimulus due to bold and / or vague claims with little substantial narrative or evidence supporting them. Finally, participants across countries reported wanting to see greater specificity in the message of the straplines (such as 'opportunity starts here') and in several cases, including Germany, Greece and Italy, the straplines used were reported as being vague and out-of-touch with issues affecting participants.

In relation to the **(paid) media channels used**, data from a series of Eurobarometer over time show the growing importance of online and social media as sources of information on EU matters in all countries. Television, the written press and radio nevertheless sustained their position of being the preferred source of information.

The #InvestEU campaign strategy defined shares in the total paid advertising budget for the specific channels, preferring the use of online and social media. Also in this case, the overarching concept of a country-specific tailored approach was valid.

The #InvestEU campaign showed a good balance in its use of the written press versus the internet-based channels. There was an over-emphasis on the use of the social media, though, possibly due to the

important role that was attributed to the social media as a channel to micro-target the campaign. In 10 out of the 16 national campaigns in the zoom-in countries, the use of the paid media channels reflected well the citizen's preferences. In Romania, Poland, Italy, Finland, Belgium and France, instead, the use of the online media did not reflect the importance of this channel as a source of information for the citizens.

Effectiveness of the campaign

Our assessment of the #InvestEU campaign effectiveness entailed on the one hand, the analysis of the levels of reach, recall and perception change achieved, set against the context of the targets defined, and on the other hand, an assessment of the extent to which the assumptions set out in the campaign strategy proved valid and allowed such achievements to occur. These relate to the influence of the paid media spending on reach and recall, the effects of the campaign *content* on awareness and perception change, and the effective involvement of internal and external stakeholders. We also considered the extent to which external factors impacted the campaign results.

Reach, recall and perception change

In relation to the campaign achievements, there is a positive indication from the results of the evaluation that the campaign was **effective in meeting almost all of its objectives**.

In terms of **Reach**, the campaign has largely exceeded its targets. The campaign reached **around 240 million people** (total deduplicated reach) via paid, owned and / or earned channels. In most countries, this equated to around 50% of the population of the targeted countries. The paid channels proved the most effective for generating reach (around 80% of the total reach). There are also countries where earned channels were particularly effective (specifically Spain, Italy and Poland), highlighting the importance of a tailored approach to the media mix.

The campaign strategy to achieve reach through paid advertising was successful especially for the social media advertising. In fact, the targets for total campaign reach were met by the paid advertising campaign alone – even if the earned coverage achieved by the campaign is excluded. According to the capabilities of the social media platforms, microtargeting was applied to reaching the segmented target audiences with social media ads based on the selected flagship projects. This strategy proved overall effective – substantially contributing to campaign visibility across core countries.

In terms of **recall**, the campaign seems to have reached its overall **25% target KPI**. The polling suggested that 16 million people (4%) *definitely* recalled the #InvestEU campaign slogan after its fourth advertising wave, while 80-100 million (20-25%) *probably* recalled it. In addition, over half of those who recalled seeing campaign materials also recalled the slogan “Opportunities start here”.

In addition, both the Kantar polling and the Ipsos Mori polling confirmed that the benchmark of 30% has been met related to the recalled publicity/information focused on EU investment. The Ipsos Mori polling also found a positive relationship between the growth in respondents who remember hearing about EU investment and the overall deduplicated reach figure (as a share of the country's population) – evidence to confirm the role of the campaign in this.

For the share of the audience who recall seeing a specific ad when shown it, Kantar's final poll found that 29% recalled seeing the specific (or similar) campaign ads they were shown. Meanwhile, Ipsos Mori's final poll found that around 10% recalled seeing the specific ads shown in the survey, with around a further 15% saying they had seen a similar ad (likely to be another InvestEU ad shown in their country, since there is also a correlation between campaign reach and this recall measure).

The micro-targeting strategy proved highly effective also in terms of **engagement**. The ‘consideration’ phase has generated a high level of traffic, above the set benchmarks for click-through rates. This was especially the case on Facebook.

In relation to the **perception change**, i.e. “awareness of positive EU impacts”, the set target KPI was to increase such awareness by 5-8 percentage points. Kantar's final poll found a 3% increase in

individual awareness of positive EU impacts, whereas Ipsos Mori's final poll found a range of results for different measures, with the best being a 4-5 percentage-point increase in those who agree that the EU helps to create the conditions for more jobs in their country or region. Therefore, this target was not met.

It appears that a recall level of 25-30% for campaign materials is not enough to produce a greater than 5% increase in such positive awareness. In other words, **achieving the recall target was not sufficient to achieve the awareness/perception change target**. To the extent that positive awareness goals were not met, there are at least two possible explanations, as to the reasons why: either this target was not chosen correctly, or the campaign materials were not sufficiently engaging/convincing to change such awareness/perception.

Nevertheless, through further analysis and the triangulation of the data we can confirm that the campaign shows positive effects in relation to the awareness of positive EU impacts. Indeed, there are several **correlations between reach and recall, and between recall and higher awareness of EU investment and a more positive perception of the EU**.

In both Ipsos Mori's and Kantar's polling, respondents who recall seeing at least one element of the campaign are much more likely to agree with statements about the benefits of EU investment than those who do not recall any campaign element. Ipsos Mori polling found that when asked if they agree it is important that the EU provides funding to support private sector firms, 77% of those who have seen the campaign agree vs 67% of those who don't recall seeing it. Equally, when asked how favourable or unfavourable they are towards what the EU is doing to invest in the economy in their country, 80% of those who recall the campaign are favourable vs 64% of those who are not. Ipsos Mori polling also found that 30% of those who were shown the ads said the campaign materials made their opinion of the EU more positive, with only 3% saying it made them feel more negative. From Kantar Public's final poll, respondents who recall seeing at least one element of the campaign are much more likely to agree with statements about the benefits of EU investment than those who do not recall any campaign element.

Based on these findings, the strategy of reaching target audiences with campaign materials based on EU funded projects, on the assumption that this would increase their awareness of such positive EU impacts, appears to have been correct. In addition, we find a correlation between specific recall of the social media ads and engagement with them (whether like/share interactions or click-throughs). This seems to confirm a causal chain from reach, through engagement, to recall and perception change – at least for the paid social media part of the campaign.

As mentioned above, the focus groups participants as well as interviewees considered the quality of the content and message to be mixed. There were some interesting insights from our qualitative analysis of data from the focus groups which confirm that the message is often weakened if the economic advantage or added value of the funding or project is unclear. The large gap in engagement rate between the best and the poorest performing ads implies there is scope for significant improvements in the lowest performing ones. From the focus groups, some of the factors highlighted as producing less positively engaged reactions were projects with too technical or local a focus to feel relevant to audiences. Factors associated with more positive reactions included projects with good human stories or relevance to national or topical issues.

Involvement of internal and external stakeholders

Evidence collected throughout this evaluation and reported in the different chapters of this report shows that the innovative semi-centralised coordination of the campaign, setting the REPs in the 'driving seats' of the national campaigns, was effective. The **strong involvement and commitment of the REPs** was a key enabling factor for the success of the campaign. It was ensured in a first instance by setting the REPs' interest in participating to the campaign as the core criterion for the identification of the 'zoom-in' countries. There was also a continued consultation process on the content of the campaigns between the REPs and the DG COMM Dir A, the coordination of which was facilitated by country representatives located within Directorate A.

Overall, the coordination and collaboration between the REPs and DG COMM worked well. However, from the interviews with the REPs a certain confusion emerged on the roles and division of labour in terms of responsibility and accountability between the EC Representations and the European Commission. The function of the REPs as being “in the driving seat” of the campaign, albeit effective, also put a considerable strain on them in terms of time and resources which not all the offices were able to handle.

Another major achievement was the good collaboration that was established between DG COMM and various **other DGs and EU bodies**. The involvement of other DGs was important for the campaign, in particular for the selection of potential flagship projects to be further assessed for their relevance by the REPs at the Member State level (with ultimate approval by DG COMM). There were some teething problems in this process during the first months of the campaign, specifically related to the specifications needed to facilitate the selection of the projects and the time and resources to be mobilised in order to optimise the process.

In addition to their support in the project selection process, the DGs and EU bodies also acted as multipliers and promoted the #InvestEU campaign through their own social media accounts, sharing the message of the campaign with their followers on Facebook and Twitter. They also used the overall “look and feel” of the campaign in their own key communication activities which further supported the campaign effectiveness.

In total 67 **EDICs** implemented communication activities in the context of the #InvestEU campaign, in response of a specific call in the autumn of 2016. It is important to note that they started their activities in February 2017, before the kick-off of the national campaigns involving the REPs. The timing of both the call and the launch of the EDICs’ activities was an important factor that influenced the focus of these communication activities.

Based on the available data and the interviews conducted, in several cases (and especially in the non-zoom-in countries) the EDICs often regarded the #InvestEU campaign to the citizens as a continuation of the first part of the “information and communication sequence” on the Investment Plan and targeted the business community. In the zoom-in countries, the focus was close to equally spread over actions targeting the business community only and those targeting both the business community and the general public. A minority of EDICs targeted the general public only (12 out of 67).

Coordination of the EDICs and the integration of their activities in the national InvestEU campaign was a task that was left over to the initiative of the national REPs. Different approaches were visible in the zoom-in countries. Only in a few countries, e.g. Italy and Spain, did the REPs take an ‘integrated’ approach. They involved the EDICs from the early stage of the national campaign which allowed for a finetuning of the EDICs actions with the corporate campaign while ensuring a tailoring of the EDICs’ dissemination strategy to the needs of their region. In many other countries, however, the EDICs reported to have worked uniquely on the basis of the call for proposal, the intranet resources (communication tools, webinar, generic emails) for the campaign, and phone calls and emails to steer their activities.

Third party endorsement was intended to be a key component of the #InvestEU communication strategy, and in a few countries, the third-party endorsers contributed positively to the outreach activities in the campaign. However, the relatively low number of third-party endorsers in the campaign (45) suggests that overall, the REPs and the local WPP offices overall encountered difficulties in obtaining the buy-in from these actors even though there were some notable exceptions to the rule (e.g. Spain). There were also apparent flaws in the execution, including a lack of transfer of background information and campaign materials. Too often, the activities of the third-party endorsers were a one-off, with no follow-up activities to maximize their impact. At the level of the campaign strategy, also a more extensive briefing of the REPs and local WPP offices on channels and ways to involve third-party endorsers would have been beneficial.

Finally, as for the **external factors**, data show that while there is a correlation of positive awareness with both recall and employment change, a significant part of the positive change in perception and

awareness among those who say they have seen the campaign is **not** dependent on the background improvements in perception and awareness due to economic recovery.

Efficiency of the campaign

The #InvestEU campaign was of a significant size and was delivered across very different countries in a targeted and tailored way. Overall the budgets per country (per population) and per channel varied significantly, as would be expected in a campaign which is decentralised to better accommodate the preferences of the intended target audience. At a broad level, the most efficient way of doing this is a multi-channel approach, as was taken. Within this mix media approach, concentration on social media meant that the costs were kept as low as possible, but still took into account the need for a wide reach and recall.

The contractor and DG COMM agreed on efficiency targets for each paid media channel, expressed in the standard advertising measure of cost-effectiveness (CPM) whereby cost-effectiveness is assessed in terms of Opportunities To See (OTS), i.e. potential reach. In relation to these targets, the #InvestEU campaign appears to have been **cost effective in every channel except print**, even though the overall CPM of €9.87 for the #InvestEU paid media was considerably higher than in the Pilot campaign.

The target CPM was set to €4 for *traditional channels* (print, OOH and digital). Overall this target was met for OOH and digital, even though in most countries (ten out of 16) the costs were much higher than the target. Print was two to ten times less cost-effective than the target across all zoom-in countries.

In relation to the *social media channels*, the target CPM of €3 for Facebook was not met, by a factor of about 15%. On the other hand, the target of €6 for Twitter was met and Instagram had the lowest CPM of all – indicating it was the most cost-effective channel in terms of generating OTS.

To improve cost-effectiveness further in relation to reach, it is likely that in some countries a similar level of reach could have been achieved at a lower cost by reducing the frequency of contact. In terms of optimising the cost of reach, some of the social media budget may have been more cost effective if used in other channels. Similarly, when looking at cost relative to prompted recall as a key campaign objective, the lowest cost per recall of the social media video ads is seen in Bulgaria, where recall was highest and where social media CPM was lowest. The costliest countries were Latvia, the Netherlands and Belgium.

Comparing the **cost relative to deduplicated reach**, individual channels differ greatly. For example, print advertising is the most expensive in almost all countries, and OOH is the costliest in Italy and the Netherlands (although the OOH campaign in France performed well). Social media advertising on the other hand tends to be the least expensive. Overall, Hungary, Portugal and Greece were more cost effective in terms of the cost of deduplicated reach, whereas Germany, Italy and Austria appear to have been less cost efficient.

Paid channels appear to be more cost effective than earned overall, with a cost per contact of about 60% that of earned coverage. Looking at the paid media collaborations, their cost effectiveness is comparable with paid ads overall, although vlog/YouTube collaborations proved to be the most expensive in terms of CPM. On the other hand, vlog/YouTube posts did have a much higher engagement rate than paid ads so their extra cost could be justified in cases where the objective is audience engagement.

Our analysis suggests that there is an optimal budget spend in terms of the frequency of exposure to an ad in order to achieve a certain level of (deduplicated) reach and recall: too little, as in Germany, and the level of exposure to the campaign materials is too low to have a significant impact on recall; too much (and too much spent through the same channels), and much of the budget is spent on multiple exposures to the same people – reducing its cost effectiveness. In the case of Greece, Hungary and Italy – the three most cost-effective countries in terms of recall after Bulgaria – the deduplicated reach of social media ads is equivalent to around 90-95% of the number of social media users in the country, with the average “frequency” of exposure to the ad by each person reached at between two and three times.

In terms of **facilitators**, the involvement of the REPs and the EDICs was significant in helping with efficiency and there are some good examples of capitalising on their existing work to augment messages. In addition, the engagement of local PR agencies helped to ensure that the activities and messages were well tailored to the audience in an efficient manner, although there are mixed results seen from the various contractors, perhaps related to the quality.

Factors influencing negatively the efficiency of the campaign implementation were: the partial overlap of the #InvestEU campaign with the business-oriented campaign on the Investment Plan creating a targeting of the business communities also in the #InvestEU campaign as mentioned above, combined with the limited integration of the EDICs' activities in the national campaigns. We also noted some planning issues, especially related to the underestimation of the efforts required for the project selection – both in terms of time and resources, at the national and central European level.

Coherence of the campaign

When considering the 'core'/WPP campaign and interlinks between the overall concept, the key messages, target audiences and channels used the campaign are **internally coherent overall**. The core principles of the campaign, with a centralised defined concept and approach, with local tailoring of channels and content to meet local concerns and areas of interest, appear from a coherence perspective to have worked well. Likewise, the media mix model of Paid, Earned, Social and Owned channels, and the supporting material produced appears in practice to have operated well, combining the different channels managed in an overall coherent fashion – with centralised/corporate management of certain channels, and decentralised (Representation) management of other channels.

In general terms, the main issues with internal coherence stem from the fact that there are different implementation mechanisms for the campaign – with associated funding mechanisms (the core campaign in the zoom in countries managed under the WPP contract, separate resources available for the Representations to undertake activities directly, resources for the investEU related citizens dialogues and finally grants available for the EDIC).

These risks were minimised by the **leading role of the Representations** in the management of the local outreach strategies as well as their role in terms of proposing actions for funding under the Representation envelope. In this respect study results suggest that actions managed by the Representations were aligned and followed logically from the overall campaign approach as well as from the local outreach strategy. However, the analysis of activities undertaken also showcase occasional “activity overlaps” – illustratively with advertising and advertorials outside the WPP envelope being extensively used in a few zoom-in countries (by both EDICs and EC Representations). This does not necessarily mean that the campaign generated duplication of efforts, as activities may have complemented the activities undertaken under the WPP envelope. However, the very uneven budgetary distribution does raise the question of coherent and efficient resource allocation across the different earned, owned, paid and shared channels and across Member States.

As regards the EDICs it may be concluded that communication activities in terms of topical coverage, overarching messages and communication channels in general terms, are aligned. Also, the relative concentration of EDIC resources in the focus countries (73% of the total EDIC envelope) is aligned with the campaign approach. However, the level of coherence varies across Member States with several EDICs focusing their activities on businesses and/or stakeholder audiences and with some focusing resources on local advertising campaigns. The timing of the call and the relative broad scope of the call for proposals for the EDIC actions appear as the main factors explaining identified coherence issues between the EDICs activities and those of the campaign overall.

At the corporate level the coordination of the campaign, with activities of the Spokesperson (SPP), the EIB and the EIF is satisfactory. Some overlaps are seen as unavoidable, in particular in relation to press and earned social media outreach. Issues of duplication are minimised through close collaboration, sharing of communication planning, and mutual use of content – especially between the corporate campaign and the SPP.

Looking at the **coherence with other DGs**, the main potential areas of overlap with communication activities lies with the communication work undertaken by DG REGIO and/or communication undertaken by Managing Authorities of the Regional Funds. Concurrently with the corporate campaign, DG REGIO conducted several-related communication campaigns (in particular “EUinMyRegion”), with significantly smaller budgets than the InvestEU campaign. What this does present is scope for improved coordination with Managing Authorities and also with forthcoming campaigns of other DGs.

EU added value of the campaign

There is nothing to suggest that most Member States are involved in, and fund, substantive proactive campaigns raising awareness of EU investments and/or showcasing benefits of EU funded projects, or that they would undertake such campaigns independently, without EU funding. Most Member State authorities are rather reactive and focus communication on generating awareness of EU opportunities among potential beneficiaries. In the cases where Member States take a more proactive approach to communicating benefits, communication has tended not to highlight the importance of EU funding to achieve those benefits.

In view of these results it may be concluded that the #InvestEU campaign has **added value across all zoom-in countries** - compared to the activities already undertaken by national authorities. This added value shows a number of different ways including notably generating awareness of the benefits of EU funded projects on the ground and highlighting the EU’s contributions to the benefits generated. There is no evidence of crowding out communication activities of national actors. On the contrary there are distinct examples of the involvement of national, regional or local agencies or politicians in campaign activities and/or in spreading the message of the campaign.

The evidence available also shows the relative advantages of corporate campaign approach, compared to potential campaigns funded by the EU but managed by Member State authorities. These advantages relate especially to the possibility to design clear and coherent EU messages, to use a coherent but tailored set of channels across Member States and to define specific outputs, results and outcomes across the campaign, against which progress can be measured. Overall there is enough evidence to suggest that an alternatively national run campaign funded by the EU might lose the “EU message”, risks becoming politicised, and is unlikely to result in cost efficiency saving for the EC.

In terms of implementation design, there is abundant evidence to suggest that the approach used by #InvestEU, combining one overarching campaign strategy with a decentralised implementation approach is a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC. When considering the potential strengths and weaknesses of the corporate communication approach compared to a fully decentralised campaigns conceptualised and implemented by EC Representations, we concluded that there are likely to be more benefits in maintaining a corporate, but decentralised approach to the EC’s communication campaigns, while maximising opportunities for decentralisation and localisation - even if this may at times weaken message coherence.

Sustainability of the campaign

The #InvestEU campaign represents a new approach for corporate communication. The length of the #InvestEU campaign, one overarching campaign strategy with a decentralised implementation, its comprehensive umbrella narrative and its overall inclusion in the corporate communication strategy are important to consider when devising an approach with objectives for a sustainable effect.

There is evidence that this type of approach has been more successful than previous models; however, the effects of any campaign will tail off following the main activities. *For each new wave of advertising there is a growing probability it is reaching individuals who have already been reached by previous waves.* This is not a problem in itself, since multiple exposures to the campaign can contribute to greater recall and awareness/perception change, but simply something that should be taken into account in terms of reach measurement and targets.

When deduplicated, the number of people potentially reached tends to plateau for each channel and for each country as the campaign progresses. This **plateau effect** holds true for reach of both paid channels and earned channels. It is particularly strong for any new wave of advertising in any single channel or in any single country.

In addition, nearly all the **change in recall and positive awareness**, as measured by Kantar Public's polling, occurred during the period between the baseline and interim polls. Very little change can be found between interim and final poll. Thus, the impact of the campaign can mainly be associated to the first waves, while *very little additional effect can be seen from continued campaigning*. In terms of recall and perception change, therefore, additional campaign spending also seems to have a reduced additional effect as the campaign goes on – although this does not preclude the campaign having the effect of *maintaining* these levels of recall and perception during the period between the interim and final polls.

Furthermore, whereas other awareness questions (such as “EU funding for specific projects”) saw a positive shift during the campaign, the awareness of the Investment Plan has declined. The Investment Plan was launched with high visibility in late 2014 but was not in the end a focus of the InvestEU campaign. This indicates that even a policy launched with a high profile can decline in public awareness if it is not the focus of communications (and a campaign). In turn, this is an indication that the awareness effects of the campaign, just as the recall effects, are likely to fade once the campaign has ended, unless periodically renewed by new phases of communication.

In addition, one reason the recall is lower in the Ipsos Mori poll than the Kantar poll could be that the Ipsos Mori survey took place two months later than the Kantar one, which may indicate that fewer members of the public remembered the content. This confirms that potentially, *the memory of the campaign faded away between the two tests*.

Academics have proposed that consumers are devoting less attention to ads than they used to¹. The researchers suggest that a range of factors impact attention and a clear “hierarchy of effects” appears to be elusive. However, they confirm that campaigns must fully evaluate the objectives of their advertising prior to creative development². In other words, where the objective is recall, this might have different implications for the type of advertising materials to be developed (as well as choice of channels) than if the objective is engagement with the ad, or longer-term perception change or increased awareness of specific information.

Other researchers conceptualise the role of memory as “delayed forgetting”, suggesting that ads are retained well for a short period and then decline rapidly (as opposed to the idea that recall of ads declines at a steady rate from the moment of seeing them). While the exact period for which memory is retained may differ according to the content and nature of the advertising, this model somewhat fits the evidence in relation to the campaign. If visual and video content is retained well for a period of weeks, before tailing off, it explains why recall and other effects remain relatively constant during the campaign, as each advertising wave is seen and retained for a period, and then started to decline a few months later. It also suggests that additional campaign spending would have an increased additional effect if it took place after a long-enough period of time that the previous wave of exposure to the campaign had started to decline in people's memories.

In terms of the material produced for the #InvestEU campaign and based on the selection of flagship projects as well as the development of related storytelling, we can observe **rather mixed-results** in terms of sustainability. The material was seen as valuable for internal stakeholders, especially

¹ *The Rising Cost of Consumer Attention: Why You Should Care, and What You Can Do about It*, Thales S. Teixeira, Harvard Business School https://www.hbs.edu/faculty/Publication%20Files/14-055_2ef21e7e-7529-4864-bofo-c64e4169e17f.pdf

² Anarchy of Effects? Exploring Attention to Online Advertising and Multiple Outcomes, Kendall Goodrich, *Psychology & Marketing*, Vol. 28(4): 417–440 (April 2011)

https://www.researchgate.net/profile/Kendall_Goodrich/publication/230537668_Anarchy_of_Effects_Exploring_Attention_to_Online_Advertising_and_Multiple_Outcomes/links/5bb2258c45851574f7f40efc/Anarchy-of-Effects-Exploring-Attention-to-Online-Advertising-and-Multiple-Outcomes.pdf

among DGs, EC Representations and EDICs but the number of toolkits downloaded tailed off quite dramatically after the first year.

It is important to **engage with journalists** to enhance sustainability of the campaign, however this was not effectively implemented. The cross-country press trips worked well but there was little follow up. Journalists who had participated in these trips, mentioned that most often, they were not informed of campaign activities within their own countries during interviews for this evaluation. Most importantly, they emphasised the importance of a continuity in contact and information transfer to journalists over a period of time to create additional press coverage, e.g. by providing them with additional material.

CONCLUSIONS AND RECOMMENDATIONS

In this report we draw detailed conclusions and provide recommendations at the level of each evaluation criterion. We summarise these conclusions below and formulate our key recommendations for the campaign overall.

Overarching conclusions

- The relevance of design and implementation of the #InvestEU campaign is high. There is abundant evidence to suggest that the approach used by #InvestEU, combining one overarching campaign strategy (led by DG COMM) with a decentralised implementation approach is a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC.
- The timing of the campaign was optimal at a time in the European Union where a number of major challenges are exercising European citizens. The campaign design approach took full consideration of the similarities and differences in each of the Member States, with a focus on zoom in countries, and was designed in a way which allowed for tailoring of channels and messages adapted to the concerns and sensitivities of citizens in the Member States. This was done whilst maintaining the core narrative – an important accomplishment of the campaign approach. Although in practice this approach was not optimal in each Member State, the overall central messages remain clear throughout.
- The campaign #InvestEU met almost all its objectives over its operational lifetime. There were countries where significant effects are evident as a consequence of the mixed media approach. Although there was some variation in terms of the quality of the message, content and delivery, this also provides additional key learning insights for future campaign design which is well targeted in each country covered
- The semi-centralised delivery of the campaign and the strong involvement and commitment of the REPs was a key enabling factor for the success of the campaign, with close coordination between the EU Representations and DG COMM. The REPs were central in taking a leading role in the management of the local outreach activities. With the REPs, on the ground, the involvement of the EDICs formed a significant part of the local campaigning activities, albeit with variations in the way in which the coordination, coherence and integration with other players was achieved. Other players were involved to smaller or larger extents such as journalists and third-party endorsers. This less well-developed involvement was not without its difficulties and could be improved in future campaigns to better effect.
- The efficiency of the campaign was ensured through the mixed media approach and a concentration on social media. This will always have pros and cons as many of the preferred channels in Member States are more costly media options. Of note is the way in which the involvement of the REPs and EDICs further increased efficiencies through capitalising on their own work.
- The #InvestEU campaign represents a new approach for corporate communication. The length of the #InvestEU campaign, one overarching campaign strategy with a decentralised implementation, its comprehensive umbrella narrative and its overall inclusion in the corporate communication

strategy are important to consider when devising an approach with objectives for a sustainable effect.

Key recommendations

The report provides a clear set of operational recommendations for future campaigns of the scale and scope of #InvestEU including important insights into how to design and implement the model of one overarching campaign strategy with a decentralised implementation approach, set appropriate targets and measure the outcomes.

We recommend DG COMM to **maintain the corporate, semi-decentralised approach** and encourage future campaigns to dedicate a similar level of attention to **pre-campaign research** informing the campaign design.

A key recommendation for future campaigns, however, is to **take a more holistic approach** to their implementation, integrating strategies and actions by the various institutional and external actors involved in delivering the campaign in order to enhance coherence and effectiveness.

This implies ensuring clear coordination and well-defined responsibilities of all of the different parties involved. Wider coordination should also take place with other EU related communication activities at the Member State level in order to increase coherence and leverage effects, e.g. enabling collaboration between the REPs and the Structural Funds managing authorities at the national level.

The coordination starts within DG COMM (across its Directorates), which includes the strategic insight and extends through to the EC Representations, the EDICs and, for example, the regional funds managing authorities. This would also include the third-party endorsers which can be expected to play an important role in conveying the messages to a wider audience, enhancing their credibility. Evidence showed the need to improve the involvement of these actors through a more organised approach to engagement, support and follow up. Across all those key parties involved, a full understanding of the breadth of activities is necessary at the design phase of the campaign.

Finally, the evidence collected confirms the importance of a centrally coordinated approach, which is strategically steered by DG COMM (in the case of #InvestEU). There was a significant amount of key data collected and analysed through the monitoring of the campaign. There were also clear targets set in advance, which helped DG COMM to understand if the campaign was on track and reaching its objectives which could be discussed and deliberated by the involved parties. This type of data, when collected for a campaign is very valuable in providing the strategic insights necessary to shape the campaign roadmap, feedback to the implementing parties and check against the performance indicators to see if everything is on track or adjustments need to be made. This includes adjustments to the targets, which may not always remain credible once a campaign is underway.

We recommend ensuring the collection and integration of qualitative and quantitative data on outputs and results related to *all* activities implemented, in order to ensure a full view on the campaign performance and its effects.

A second key recommendation is to **consider sustainability from the outset** of any campaign while **enforcing campaign efficiency**.

A key learning insight from this evaluation was the importance of ensuring a continuous fine tuning of the campaign material to maximise the impact. We suggest expanding the testing of the campaign material in future campaigns to cover also the content of the campaign (next to the campaign branding) by setting up focus groups *before as well as during* the campaign implementation.

In order to operationalise this approach, due consideration needs to be taken of the resource intensity of the activities, both financial and human resource (including skills).

Mechanisms to enforce efficiency include the planning of microtargeting waves for future campaigns and the extension of the intervals between campaign waves in order to mitigate against reaching the same audience many times, and a decision-making on channel and budget mix based on campaign

objectives and priorities (reach, recall, engagement, or perception change) rather than market price. We also recommend future campaigns to take account of different costs in channels over the countries and to optimise the cost of reach in social media by monitoring the level of saturation of the channels and redirecting some of the social media budget to other channels once a high level of reach has been achieved.

Finally, we invite DG COMM to enhance the use of novel (qualitative) techniques better to capture the effects (potentially) leading to perception change, such as text mining of press coverage and the qualitative analysis of online conversations.

Table of Contents

| | | |
|----------|--|-----------|
| 1 | Introduction | 5 |
| 1.1 | Objectives of this study..... | 5 |
| 1.2 | The evaluation methodological framework..... | 5 |
| 1.3 | Structure of the report | 7 |
| 2 | Background of the campaign | 8 |
| 2.1 | The EC Corporate Communication strategy | 8 |
| 2.2 | The operating context | 9 |
| 2.3 | Initiatives setting the basis for the #InvestEU campaign..... | 12 |
| 3 | The #InvestEU campaign implementation – state of play | 14 |
| 3.1 | The #InvestEU campaign – an overview | 14 |
| 3.2 | Implementation of the integrated campaign | 19 |
| 4 | Answers to the evaluation questions | 27 |
| 4.1 | Relevance of the campaign | 27 |
| 4.2 | Effectiveness of the campaign | 39 |
| 4.3 | Efficiency of the campaign | 65 |
| 4.4 | Coherence of the campaign | 76 |
| 4.5 | EU added value of the campaign | 88 |
| 4.6 | Sustainability of the campaign | 93 |
| 5 | Conclusions and recommendations..... | 98 |
| 5.1 | Related to the evaluation criteria | 98 |
| 5.2 | Overarching conclusions and recommendations | 107 |

Tables

| | | |
|----------|---|----|
| Table 1 | Evaluation matrix – data collection methods | 6 |
| Table 2 | Treatment of the selected projects..... | 20 |
| Table 3 | Outputs on the paid channels | 21 |
| Table 4 | Events organised in the zoom-in countries | 22 |
| Table 5 | Profile of the ‘external’ third-party endorsers in the countries..... | 24 |
| Table 6 | DG COMM Management Plan targets for 2017/18 for the InvestEU campaign | 52 |
| Table 7 | Targets set for WPP by DG COMM for the InvestEU campaign | 55 |
| Table 8 | Coordination mechanisms | 59 |
| Table 9 | List of projects selected per partner DG | 61 |
| Table 10 | Regression analysis channels and budgets | 70 |
| Table 11 | Performance against KPI benchmarks for cost-efficiency – paid media..... | 75 |

Table 12 Overview of budgetary spent of the “Representation envelope”81
 Table 13 Added value and shortcomings of the corporate communication approach used in #InvestEU 89

Figures

Figure 1 #InvestEU intervention logic..... 6
 Figure 2 Percentage of EU citizens having a positive image of the European Union..... 9
 Figure 3 Eurobarometer QA3a, Most important issue facing the country (2015).....10
 Figure 4 Citizens well-informed on European matters (2015)10
 Figure 5 Use of the media channels (2016) 11
 Figure 6 Sources for information on European matters (2015)..... 11
 Figure 7 Distribution of the #InvestEU campaign budget..... 15
 Figure 8 The PESO model..... 17
 Figure 9 Governance and implementation structure for the #InvestEU campaign.....19
 Figure 10 Total spend on paid media 22
 Figure 11 Cross-country press trips in 2017-18 23
 Figure 12 Profile of journalists involved in the cross-country press trips 23
 Figure 13 Profile of the ‘external’ third-party endorsers 24
 Figure 14 Profile of the EDICs involved..... 26
 Figure 15 Evolution of citizens’ concerns 2015 - 2017.....27
 Figure 16 Citizens’ concerns in the zoom-in countries, 2017 28
 Figure 17 Citizens’ concerns in the zoom-in countries, 2018 28
 Figure 18 EU initiatives funding the showcased projects 29
 Figure 19 Key topics covered by the showcased projects 30
 Figure 20 Key topics of the projects in the zoom-in countries 30
 Figure 21 Coverage of the citizens’ concerns31
 Figure 22 Under-coverage of concerns in the economic sphere 31
 Figure 23 Over-coverage of concerns in the economic sphere..... 32
 Figure 24 Preferred sources of information on European matters, 2015-17 36
 Figure 25 Main sources of information on EU investments 36
 Figure 26 Alignment in the use of paid channels - overall.....37
 Figure 27 Paid media outputs in countries with written press as main source of information37
 Figure 28 Paid media outputs in countries with written press as main source of information 38
 Figure 29 Use of paid channels versus EB data on preferred sources of information on EU matters..... 38
 Figure 30 Share of reach achieved by each paid media channel, per country 40
 Figure 31 Deduplicated reach in contacts, across all channels, as share of country’s population 41
 Figure 32 Correlation between overall deduplicated reach and spontaneous specific recall..... 43
 Figure 33 The correlation between prompted recall of the social media ads with the campaigns paid social ad reach (left-hand chart) and paid reach (right-hand chart) 44

Figure 34 Scatter plots showing correlations between recall and engagement on paid social media: interactions (likes, shares, etc.) on the left and click-throughs on the right..... 46

Figure 35 Engagement rate per zoom-in country on paid social media47

Figure 36 Engagement rate per project campaign on paid social media.....47

Figure 37 Click-through rate per zoom-in country for digital advertising 48

Figure 38 Click-through rate per project campaign for digital advertising..... 49

Figure 39 Correlation of perception change and recall 50

Figure 40 Correlation of spontaneous specific recall and positive perception change in Ipsos Mori (left) and Kantar (right) polling 51

Figure 41 #InvestEU interactions of the DGs’ social media posts61

Figure 42 Target audiences of the EDICs’ actions..... 62

Figure 43 Effect of employment on audience opinion of the EU, by country..... 64

Figure 44 Media budgets, per channel per country..... 66

Figure 45 Aggregated Opportunities to see (impressions) per paid channel per country..... 66

Figure 46 Opportunities to see per country, as a proportion of the population.....67

Figure 47 CPM per social media channel 69

Figure 48 A scatter plot showing correlation of total deduplicated paid contacts in relation to media budgets 71

Figure 49 Scatter charts showing correlation of deduplicated contacts per channel in relation to media budgets . 71

Figure 50 Cost per prompted recall – social media video.....72

Figure 51 Paid media collaborations – CPM by country, in terms of OTS and contacts73

Figure 52 Focus: Paid media collaborations – CPM by channel, in terms of OTS and contacts74

Figure 53 Budgetary breakdown of the campaign, actuals*** (incl. 2017 and 2018** funding for the REPs), in ‘00077

Figure 54 Overview of projects and financial allocations – the Representations envelope79

Figure 55 Cumulative growth in deduplicated reach during the campaign, paid vs earned 93

Figure 56 Average change in awareness, final poll against baseline..... 96

Abbreviations

| Abbreviation | Definition |
|--------------|-----------------------------------|
| CPC | Cost per click |
| CPM | Cost per thousand |
| DG | Directorate-General |
| EC | European Commission |
| EDIC | Europe Direct Information Centres |
| EU | European Union |
| KPI | Key performance indicators |
| OTS | Opportunities To See |
| OOH | Out-Of-Home |
| REP | EC Representations |

Glossary

| Term | Definition |
|--|--|
| CPM | Cost of impressions (Opportunities To See), expressed as cost per thousand ad impressions |
| Reach | Number of people of the target audience <i>potentially</i> reached by the campaign |
| Recall | <p>Number of people that have seen the campaign, and remember seeing it. A distinction is made between</p> <ul style="list-style-type: none"> • General recall: Percentage of recall of publicity/information focused on the EU (among target audience) • Specific recall: Percentage of recall of publicity/information focused on EU investment and funding (among target audience) • Campaign recall: Percentage of recall of campaign signature and/or specific poster or ad or other type of branded product <p>A prompted recall is the percentage of the audience who recall seeing a specific ad or slogan when shown it.</p> |
| Impressions - also called Opportunities To See (OTS) | Number of potential exposures to the campaign material taking no account of repeat exposure (e.g. OTS for an item published on a website is estimated as the number of monthly visitors) |
| Campaign intensity | The number of OTS generated by the campaign per member of the population |

1 Introduction

This report is the draft final report of the study ‘Monitoring the performance of the EC communication activities for the Investment Plan for Europe’, commissioned by the European Commission’s Directorate-General for Communication (DG COMM) within the Framework Contract between Technopolis Group (consortium leader) and DG JUST, JUST/2015/RP/01/0003.

The study was launched in December 2016, starting with the monitoring services. The evaluation was conducted between January and September 2018 by Technopolis Group and its partners Ipsos Mori and Henningsen Consulting.

1.1 Objectives of this study

The original objective of this study was to support DG COMM in the development and implementation of the #InvestEU campaign monitoring activities. A contract modification was made on the 22nd August 2017, extending the assignment from a monitoring exercise to an evaluation. Technopolis was requested to assess the efficiency, relevance, coherence, EU added value and sustainability of the #InvestEU activities, alongside the existing monitoring and assessment of the effectiveness (reach, recall and perception change).

In line with the Better Regulation Guidelines, the following evaluation questions were defined as follows in the Terms of Reference (ToR):

- Relevance – How relevant were the communication activities to the EU citizens, EU businesses and to the Commission’s stakeholders?
- Effectiveness – What was achieved? To what extent were the set objectives of the communication activities achieved? What factors influenced the achievements observed?
- Efficiency – Were the effects/benefits achieved at a reasonable cost? What factors influenced the efficiency of the observed results?
- Coherence – Did the various #InvestEU communication activities work well together and with other EU communication activities?
- EU added value – What is the additional value resulting from corporate communication activities at EU level, compared to what could be achieved by MS at national/regional levels?
- Sustainability – Are the effects of the #InvestEU communication actions likely to last after the communication interventions end? To what extent the issues addressed by the communication activities require continuous communication effort?

The expectation was that evidence-based conclusions would be drawn, and recommendations formulated for each evaluation criterion.

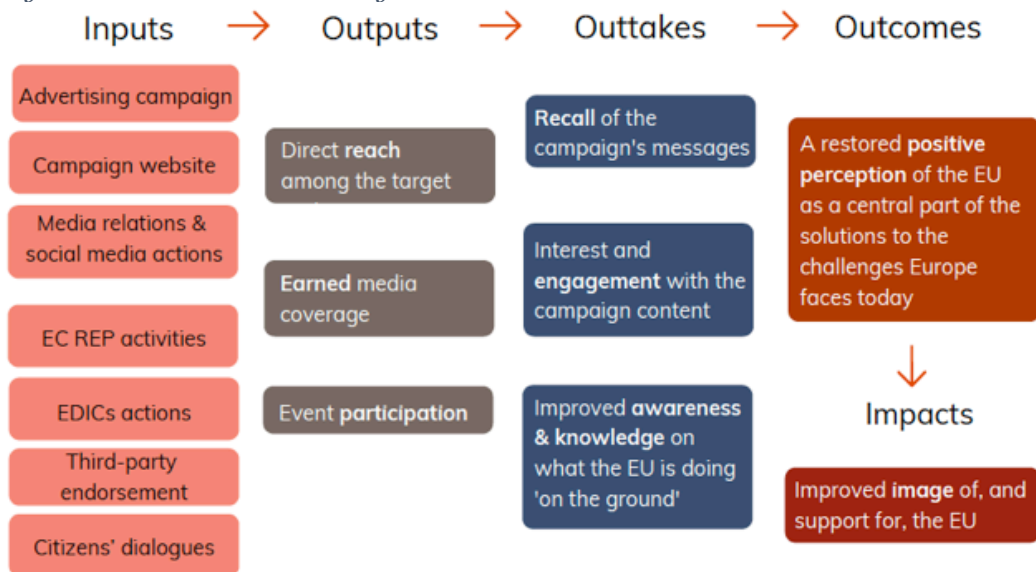
The evaluation covers the **first year of the #InvestEU campaign implementation**, i.e. from March 2017 to March 2018. The ToR specified that the scope of the evaluation would be the same as for the monitoring activities (i.e. the #InvestEU campaign and the REPs’ and EDICs’ activities on the Investment Plan), with however a special emphasis on the #InvestEU campaign in the zoom-in countries (at the time of the contract signature, 14 Member States).

1.2 The evaluation methodological framework

In line with the theory-based approach to monitoring and evaluation activities set out in the Better Regulations and its Toolbox, the monitoring and evaluation activities were based upon an analysis of the #InvestEU campaign objectives, mapped out in an intervention logic (Figure 1).

This intervention logic set the overarching framework for our monitoring and evaluation activities.

Figure 1 #InvestEU intervention logic



The intervention logic of the #InvestEU campaign set the basis for the development of the evaluation framework, i.e. the detailing down of the evaluation questions into sub-questions or ‘topics for investigation’. These questions and sub-questions were then matched with the most appropriate sources and methods for the data collection and analysis, giving way to the ‘evaluation matrix’.

In line with the Better Regulations, a *mix of qualitative and quantitative methods* is used in this study. The key concept is that the evaluation results should build upon triangulation of data collected, deriving from multiple sources, in order to reach a proper understanding of the context, the needs and the potential chain of effects.

- The quantitative data entailed the data collected in the monitoring assignment, including three waves of polling in the 14 core countries by the #InvestEU campaign contractor Kantar Public (baseline, midterm and ex-post in April 2018), two waves of polling conducted by the evaluation study team (pre- and post-campaign, the latter in June/July 2018), the statistical analysis of the monitoring data related to the attainment of the expected reach and recall in the paid, earned and owned media channels, web analytics conducted by the study team, and the analysis of secondary Eurobarometer and Eurostat data
- The qualitative assessment is based upon desk research, an extensive interview programme including 148 interviews out of which 52 face-to-face (conducted in April-May 2018); 18 focus groups in nine zoom-in countries (May 2018), and seven case studies (May/June 2018). The main purpose of the ‘qualitative’ data collection and analysis activities in the evaluation was to verify the assumptions underlying the logic and to collect evidence on facilitators or barriers for the attainment of the expected results.

In Table 1 below, we provide an overview of the topics for investigation defined for each evaluation criterion and the extent to which qualitative or quantitative methods were used for the collection of the needed evidence.

Table 1 Evaluation matrix – data collection methods

| Evaluation criteria and topics for investigation | Qualitative data | Quantitative data |
|---|------------------|-------------------|
| Relevance | | |
| Relevance EU citizens, business & EC stakeholders | | |
| Needs, problems, issues in the countries | XX | XX |
| Alignment of the objectives | XX | |
| Alignment of the communication strategy | XX | |
| Suitability of content | XX | X |

| Evaluation criteria and topics for investigation | Qualitative data | Quantitative data |
|--|------------------|-------------------|
| Effectiveness | | |
| Achievements | | |
| The reach | XX | XX |
| The recall | XX | XX |
| The engagement | XX | X |
| Perception change effects | XX | X |
| Effects on key external stakeholders | X | |
| Facilitators & barriers | | |
| Communication strategy | XX | X |
| Quality of content and messages - for targeted audiences and key external stakeholders | XX | X |
| Effective involvement of internal stakeholders | XX | |
| Effective involvement of external stakeholders | XX | |
| External factors impacting public opinion on EU affairs | XX | X |
| Efficiency | | |
| Cost-efficiency | XX | XX |
| Facilitators & barriers | | |
| Efficiency in implementation | XX | |
| Collaboration and task allocation | XX | |
| Support delivery | XX | |
| Coherence | | |
| Internal campaign coherence | XX | |
| External communication coherence | X | |
| EU added value | | |
| Centralised versus national campaigns | X | X |
| EC centralised versus national 'independent' campaigns | X | |
| Sustainability | | |
| Sustainability of the effects on the citizen | XX | X |
| Sustainability of effects on external stakeholders | X | |

Notes: Double X indicate a more intense use of the type of method for the specific evaluation topic

1.3 Structure of the report

The structure of the report reflects the indications set out in the Better Regulations Toolbox.

- In Chapter 2 we set out the background to this study, including the policy and external environment to the #InvestEU campaign
- Chapter 3 gives an overview of the state of play in the #InvestEU campaign
- In Chapter 4 we report on the outcomes of our analyses and respond to the evaluation questions related to the relevance, effectiveness, efficiency, sustainability, coherence and EU added value of the campaign
- Chapter 5 contains our conclusions and recommendations

Annexes to this report are:

- Annex 1: Methodology and Data Analysis Report
- Annex 2: Infographics (overall and per country)
- Annex 3: Focus group report
- Annex 4: Polling reports (pre- and post-polling)
- Annex 5: Raw data
- Annex 6: Focus group transcripts

2 Background of the campaign

This chapter sets out the basis for the evaluation of the campaign. We first describe the external environment that influenced the design of the #InvestEU campaign, such as the EC Communication Strategy and the needs and concerns of the EU citizen, complemented with information on the use of media channels in Europe (Section 2.1). Section 2.2 sets out the operating context for the campaign. In Section 2.3 we provide an overview of the initiatives that set the basis for the design of the #InvestEU campaign.

2.1 The EC Corporate Communication strategy

Adopted in 2013, the Communication on corporate communication under the Multiannual Financial Framework 2014-2020, sets out the basic approach for communication across the European Commission.

It developed the framework and established the rules and means for “a more effective communication of institution-level messages, including reputation and image management”.³ Corporate communication was firmly set in the context of the European Union's strategy for smart, sustainable and inclusive growth (EU2020) and the Lisbon Agenda.

A key feature of the new approach is the focus of communication on the EU's political priorities to the ‘general public’. Corporate communication focuses “on the big things where citizens expect Europe to make a difference”⁴. Reflecting the ten Commission political priorities set out in the ‘Agenda for Jobs, Growth, Fairness and Democratic Change’, the emphasis in 2015 was on the role of the EU in creating quality jobs, stimulating investment, working to modernise the economy and collectively providing more safety and security for citizens. It was considered crucial that corporate communication would focus on “what Europe does for people: a Europe that protects, empowers, defends and preserves the European way of life.”⁵

Since 2014, four corporate communication campaigns have been launched, of which one was a pilot campaign. These campaigns aimed at impacting how European citizens feel about the European Union and how they feel their voice is heard in the EU, factors which in turn should help enhance the image of the EU among its citizens. They are all managed centrally by DG COMM and include complementary communication activities carried out primarily by the EC Representations in the Member States with additional support from the Citizens’ Dialogues and Europe Direct Information Centres (EDIC) structures.

The current EC corporate communication framework consists of campaigns along three strands of narratives:⁶

- EU Delivers (#InvestEU): focused on the message that the EU responds to key socio-economic challenges and acts as a catalyst boosting the local economy (jobs, new business prospects, improved services, modernised infrastructure...). The overarching message is that EU funding has a tangible impact on people's lives
- EU Empowers (EUandMe): an "umbrella" communication campaign showcasing EU values in action and celebrating the European way of life, which makes the European Union a place like no other

³ SEC(2013) 486/2, Corporate communication under the Multiannual Financial Framework 2014-2020

⁴ Commission Work Programme 2016 COM(2015) 610

⁵ Towards a better Europe – A Europe that protects, empowers and defends, State of the Union 2016 by Jean-Claude Juncker, President of the European Commission, 14 September 2016

⁶ DG Communication, Management Plan 2018, Ref. Ares(2017)6346246 - 22/12/2017

- EU Protects: showcasing European Union action to address people's safety and security concerns. This action is anchored in the European Union values of peace, security, rule of law, democracy and respect for human rights

2.2 The operating context

The level of trust in the European Union, the needs and concerns of the European citizens, and their media habits and attitudes are important factors characterising the environment in which the #InvestEU campaign took place.

In the sections below, we give an overview of the outcomes of Eurobarometer surveys on these topics, conducted at the time of the #InvestEU design.

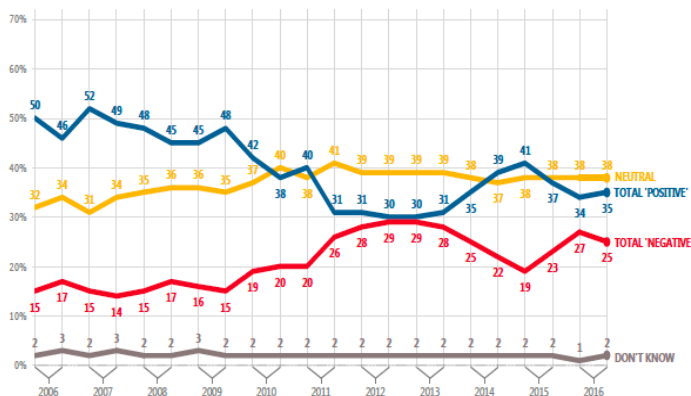
2.2.1 Attitude towards the European Union and the citizens' needs and concerns

Support for the European Union

A major driver for the launch of the #InvestEU campaign was the perceived decrease in support for the EU among European citizens and their limited awareness of the role the EU is playing to speed up the creation of jobs and growth.

Developments in public attitudes towards the EU is an important contextual element for the #InvestEU campaign. In the mid-2010s, public support for the EU was declining (Figure 2) and, as highlighted by President Juncker in his 2015 State of the Union Speech, trust in the EU as an enabler for growth and prosperity was questioned.

Figure 2 Percentage of EU citizens having a positive image of the European Union



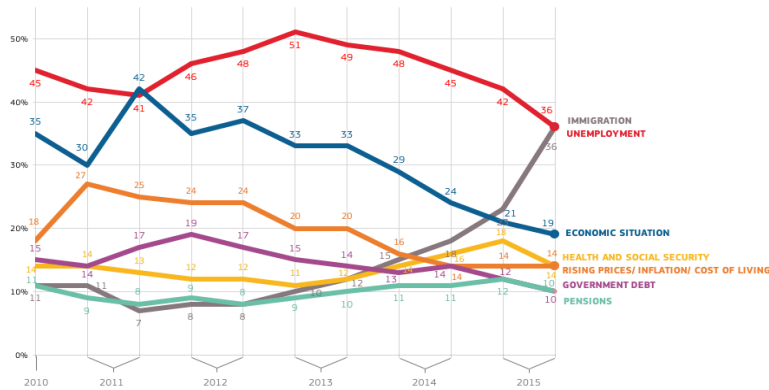
Source: DG COMM Annual Activity Report 2016 ⁷

Concerns among the EU citizen

The autumn 2015 Eurobarometer data showed that **concerns** related to the economic situation at national level were decreasing since 2012; a similar trend was detected for the concerns related to unemployment (Figure 3, below). The trend analysis showed a rising concern in relation to immigration, instead. The perceptions about the economy varied widely among the Member States and were interlinked with the rate of unemployment.

⁷ DG Communication, Annual Activity Report 2016, Ref. Ares(2017)1842517 - 06/04/2017

Figure 3 Eurobarometer QA3a, Most important issue facing the country (2015)

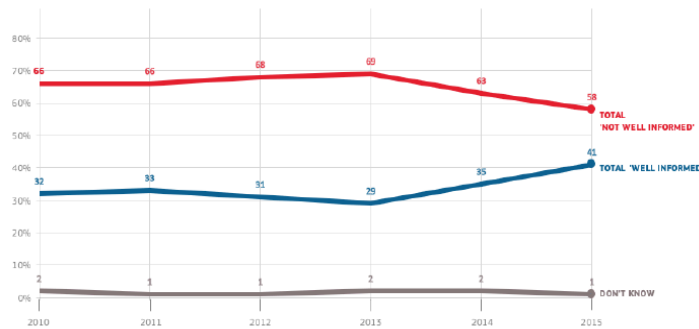


Source: TNS opinion & social, 2016

Need for more and better communication from the EU

The 2015 Eurobarometer survey also indicated a need for more information from the EU, delivered in a different and simplified way. More than half of the European citizens did not feel well-informed about European matters. This perception had changed little since autumn 2010, the time of the economic crisis (Figure 4). Close to eight in ten respondents agreed that “the EU needs a clearer message”.

Figure 4 Citizens well-informed on European matters (2015)



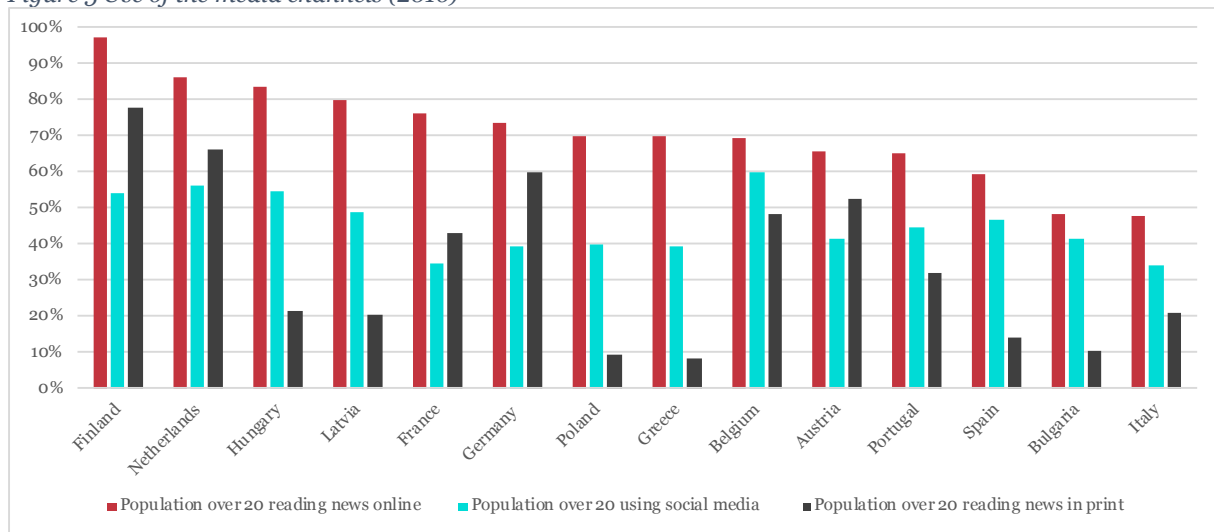
Source: Standard Eurobarometer 84 (autumn 2015)

2.2.2 Media habits and attitudes

Media habits

Data collected by Eurostat shed a more detailed light also on the use of media channels in European Member States. Focusing on the population over 20, Figure 5 shows that while Europeans mainly read news online, in countries such as Finland, Netherlands, France, Germany and Austria, the printed press is the second source of information. It should be noted that television figures as the first source in all countries.

Figure 5 Use of the media channels (2016)



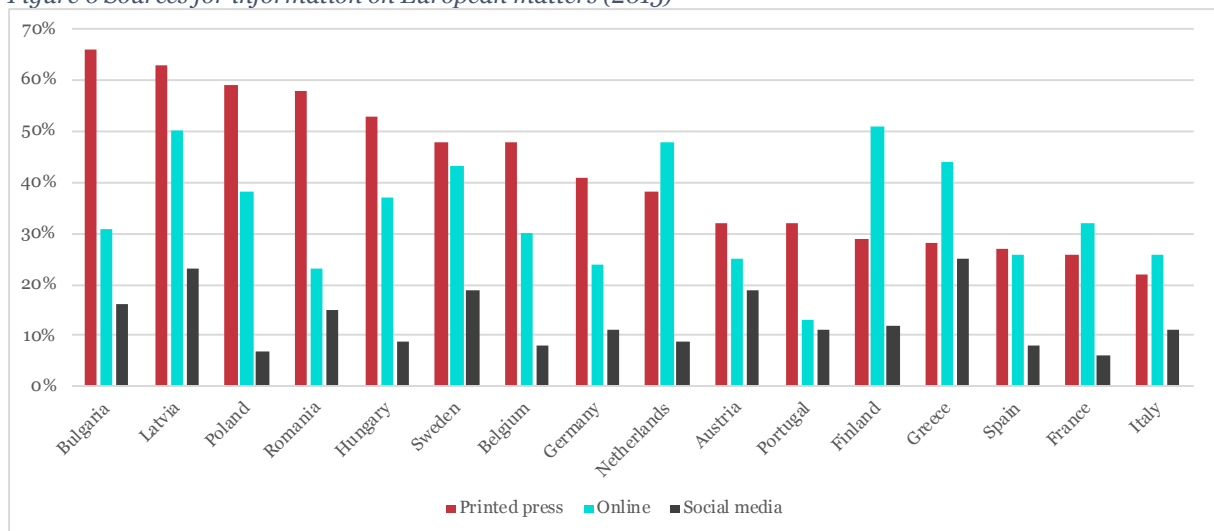
Source: Eurostat, 2016

Main sources of information on EU matters

Television remains by far the main source of information also in relation to “European affairs” (indicated by 74%), ahead of the written press (39%), radio (36%) and the Internet (35%).

The printed press is a key source for information especially in Central and European countries such as Bulgaria, Latvia, Poland and Romania, while citizens in the Netherlands, Finland and Greece especially consult the online media. Social media was indicated by a low share of respondents in all countries, with the exception of Greece.

Figure 6 Sources for information on European matters (2015)



Source: Eurobarometer, 2015

2.3 Initiatives setting the basis for the #InvestEU campaign

The #InvestEU campaign strategy built on evidence collected from a number of initiatives, including the evaluation of a pilot campaign and preparatory research based on Eurobarometer data.

In this section we give a brief overview of the outcomes of these exercises and the main lessons learned.

2.3.1 *The pilot campaign “The EU is working for you”*

In 2014, a first corporate communication campaign was launched with the main message ‘*the EU is working for you*’. It was designed as a pilot project, to test the corporate approach and gather evidence and recommendations on how future corporate communication activities should be carried out. The campaign ran between July 2014 and February 2015 and targeted a wide public in Spain, Germany, Poland, Finland, Portugal and Latvia.

The evaluation of the pilot campaign identified as key area for improvement to the corporate campaign approach the insufficient qualitative research into the views and motivations of the target group (people with a neutral opinion of the EU), which made them difficult to target. The report considered that there was insufficient qualitative data to provide an understanding of the type of content, issues and approach to delivery that would resonate best with the target group.

The evaluation also stressed the importance of focusing the message on how the citizens *personally* could and do benefit from EU support. Focus group research suggested that people are more interested when they see themselves in the stories portrayed - or experiences they know or can relate to. The report considered that public awareness information campaigns work best when they work at the emotional level; the provision of pure facts is unlikely to be effective. The recommendation was to use story-based approaches rather than dry facts alone, with the stories nonetheless rooted in reality, and to use the local EC Representations’ knowledge.

In terms of channels, the evaluation recommended to build ‘reach’ by using a multi-channel approach, keeping TV in the media mix where possible because it proved to be most effective at generating recall. The website should serve as an effective gateway to more information, easy to navigate and visually aligned with the campaign.

2.3.2 *Analysis of Eurobarometer data*

In order to ensure an optimal targeting of the campaign, DG COMM launched and coordinated a desk research study in 2016 to understand the climate of opinion in which the campaign would take place, based on an analysis of responses in the Standard Eurobarometer survey.⁸

The analysis of the perceptions related to the European Union was based on three indicators: the image of the EU; trust in the EU and optimism for the EU’s future; and how the citizens perceive the EU’s role in the economy, specifically in terms of creating the conditions for more jobs. The study highlighted significant differences between European Member States in particular in relation to the question whether the EU is creating the conditions for more jobs in Europe; agreement with this statement was linked to support for the EU.

Through the analysis of the Eurobarometer data, groups of countries where a communication campaign would be most successful were identified. The analysis divided the EU Member States into four groups, reflecting the levels of trust in the role of the EU.

- Countries belonging to Group 1 (most convinced about the EU’s role in creating jobs) include Poland, Latvia and Bulgaria. Citizens in Poland and Latvia nevertheless had a lower share of citizens also supporting the EU. The study considered that a focus in the campaign on the Group 1 countries would be a fairly low-risk strategy, but potential gains were limited.

⁸ Standard Eurobarometer 84 – TNS opinion & social, Public opinion in the European Union: Communicating the Juncker plan, February 2016

- Countries like Austria, Belgium, Greece, Italy, Spain and France, Italy and Spain, belonged to Group 4 where the perception of the role of the EU was lowest, and also the support to the EU was also at particularly low levels, with the exception of Belgium. A focus in the campaign on these Group 4 countries was considered to be riskier, but with greater potential gains.

Matching the profiles of the countries to the main media sources for information on EU matters, the #InvestEU background research study also noted that while television is the most preferred channel for all, there was a clear difference between the countries in Group 1 where the internet was an important channel, and those in Group 4 where instead traditional media such as the printed press played an important role.

The study concluded that in the case of communication to countries where respondents believe that the EU plays an effective role in job creation, the media mix of this campaign should emphasise the *Internet*, as it is the number two media channel for the countries of this group. To convince the most reluctant countries that the EU creates the conditions for more jobs in Europe, instead, the media mix should give an important place to *traditional media*, such as radio and written press, as these media are much used in the countries of this group.

3 The #InvestEU campaign implementation – state of play

In this chapter, we provide the most relevant information on the implementation of the #InvestEU campaign, providing the basis for the responses to the evaluation questions. The assessment of the information provided in the sections below is therefore undertaken in the next chapter.

We begin by describing key characteristics of the campaign such as budget and objectives, the key principles of the communication strategy, and the structure for the campaign management and administration. Section 3.2 gives an overview of the communication activities that were implemented in the first year of the #InvestEU campaign and the achievements in terms of outputs produced and actors involved.

3.1 The #InvestEU campaign – an overview

3.1.1 Objectives and timeline

The #InvestEU campaign was part of an “**information and communication sequence**” that intended to enhance awareness among stakeholders and the European citizens of the Commission’s 10 political priorities and in particular the delivery on ‘jobs, growth and investment’.⁹ DG COMM’s 2016 Annual Activity Report¹⁰ informed that this sequence consisted of two “interrelated and mutually reinforcing” phases:

- An integrated communication action, targeting the European business and financial communities with the objective of attracting potential investors and project promoters for the EU Investment Plan - to be run in 2016
- The #InvestEU campaign targeted towards a wider ‘general public’ audience, focused on the Investment Plan for Europe and other EU initiatives in favour of jobs, growth and investment – to be launched in mid-2016

Following a planning and scoping phase that started in October 2016, the #InvestEU campaign was officially launched in March 2017. The campaign was originally planned to last one year; it was decided to extend the duration until the end of the mandate of the Juncker Commission i.e. up to late 2019.

The **overarching objective** of the #InvestEU campaign was to improve public awareness and knowledge of the EU funding and how it contributes to the creation of jobs and growth. As such the campaign had two main expected impacts:

- An enhanced awareness and knowledge of the positive contribution to job creation, growth and investment made by EU funding - in the EU overall, nationally and locally
- A restored positive perception of the EU as a central part of the solutions to the challenges Europe faces today

3.1.2 Budget and geographical scope

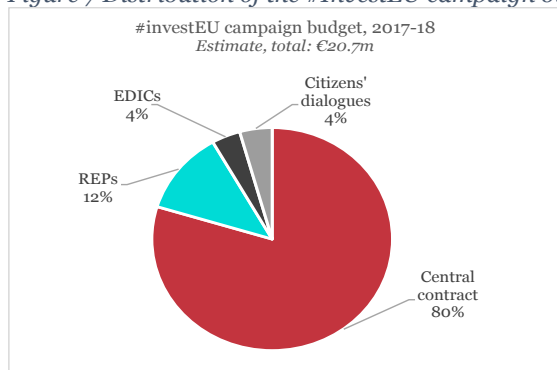
We estimate the *overall* budget for the #InvestEU campaign in its first year of activity (March 2017-18) at €20.7m; 80% of this budget (€16.5m) was managed through a central contract, which was awarded in 2016 to the contractor, the WPP group (Figure 7).

An additional €2.5m (12% of the campaign budget) was available for the national EC Representations and €797k for the EDICS (4%). A sum was set aside also for the organisation of Citizens’ Dialogues focused on the Investment Plan, which we estimate at €900k (based on data provided in 2016).

⁹ Strategic Plan 2016-2020, DG COMM, Ref. Ares(2016)1853065 - 19/04/2016

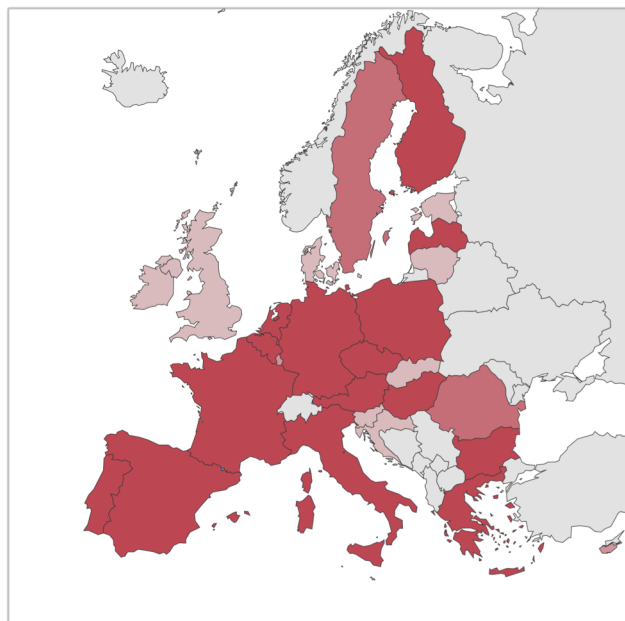
¹⁰ DG Communication, Annual Activity Report 2016, Ref. Ares(2017)1842517 - 06/04/2017; Request for a communication action, for a specific contract to be placed in the context of the multiple Framework Contract with renewed competitive tendering for the provision of services linked to the organisation of information and communication campaigns: #InvestEU, Communicating the Investment Plan for Europe and other jobs and growth initiatives, Ref. Ares(2016)4869204 - 30/08/2016

Figure 7 Distribution of the #InvestEU campaign budget



Source: WPP #InvestEU campaign budget consumption dd11/4/2018; EDIC Interim report; DIR B

The #InvestEU campaign covered all 28 EU Member States (coloured in pink on the map) but focused its efforts on a defined set of ‘zoom-in’ countries.



The 14 ‘zoom-in’ EU Member States that joined the campaign at its inception phase in 2016 were Austria, Belgium, Bulgaria, Germany, Greece, Spain, Finland, France, Hungary, Italy, Latvia, Netherlands, Poland and Portugal (highlighted in dark red).

Romania and Sweden joined the #InvestEU campaign as zoom-in countries in September 2017 (highlighted in medium red).

Luxembourg and Cyprus have officially joined for the continuation phase of the campaign in 2018, while the Netherlands has decided to opt out.

3.1.3 Key principles of the communication strategy

An integrated campaign taking a combined centralised and decentralised approach

The #InvestEU campaign was designed as an **integrated campaign** that would take place at two levels: a centrally overseen pan-European campaign, integrated with campaigns at the national level that would constitute the core of the campaign.

Taking up the lessons learned from the pilot campaign on the importance of the national contexts (see Section 2.3.1, above), the #InvestEU campaign design was based on the concept that a ‘one-size-fits-all’ approach would be inappropriate. The overarching narrative was to be tailored to the concerns, sensitivities and needs of the citizens in the Member States in which the campaign was rolled out, and the communication mix, defined at the central level, was to be adapted to the local circumstances and audiences.

The campaign took a novel ‘**semi-decentralised**’ approach, with the EC Representations (REPs) ensuring relevance and credibility, and DG COMM taking up a coordinating role to ensure consistency.

The campaign therefore substantially built upon the knowledge of the local environment among the national EC Representations. They were “in the driving seats” for the design and implementation of the campaign in their countries, supported by the contractor’s local network.

Target audience and countries

The #InvestEU campaign defined its target audience in terms of “Europeans who are neutral about the EU and economic prospects”. In the beginning of the campaign, these were defined as follows:¹¹

- ‘Positives’: Trust in the EU, positive image of the EU or optimistic about the future of the EU AND agree that ‘the EU helps create the conditions for more jobs’
- ‘Ambivalent’: Trust in the EU, positive image of the EU or optimistic about the future of the EU, BUT disagree that ‘the EU helps create the conditions for more jobs’

The definition of this target audience was based on the outcomes of the background study mentioned in Section 2.3.2 above, based on Eurobarometer surveys, and the learnings of the pre-campaign focus group. It was considered that the #InvestEU campaign did not have the capacity in terms of available resources to change the attitude of those EU citizens with a negative perception of the EU. This was one of the key learnings of the pilot campaign.

This global targeting strategy served as the framework for the development of the targeting strategies at the national level in the zoom-in countries, identifying key population segments.

The ambition of the #InvestEU campaign (changing the perceptions of the role of the EU among the EU citizens) was high and the scale of the campaign’s scope (all EU 28 countries) was vast. In order to avoid fragmentation of the relatively limited campaign budget¹², the integrated #InvestEU campaign concentrated on a set of ‘zoom-in’ countries.

A first selection of the zoom-in countries was based on the targeting criteria of attitude and perception of the EU, based on the campaign’s background study. Seeing the important role of the national EC Representations (REPs) in these nationally organised campaigns, however, the primary criterion was the REPs’ interest and willingness for participation.

A multi-channel approach, combining owned, earned, shared and bought channels

The #InvestEU communication strategy adopted the **PESO media mix model**, combining Paid, Earned, Social/Shared and Owned channels and managing these channels in an overall coherent manner (Figure 8).

The approach was to build upon the existing **owned channels** at the EC central level and among the REPs, along with the already available resources and local knowledge in the REPs to implement ‘owned’ communication and PR activities. Owned channels include the campaign website, the EC social media channels (Twitter accounts, Facebook pages, YouTube channels and Instagram and LinkedIn accounts – whether central or from EC REPs). The events organised by the REPs or the EU services (for the latter, in particular the Citizens’ Dialogues focusing on the Investment Plan for Europe) and the EDICs were intended to reinforce these communication tools.

This was to be combined with the services of a contractor (WPP), who was to take care of the **‘bought’ and ‘earned’ media coverage** (including paid advertising and journalist-targeted actions) - at the central level and at the national level in the ‘zoom-in’ countries.

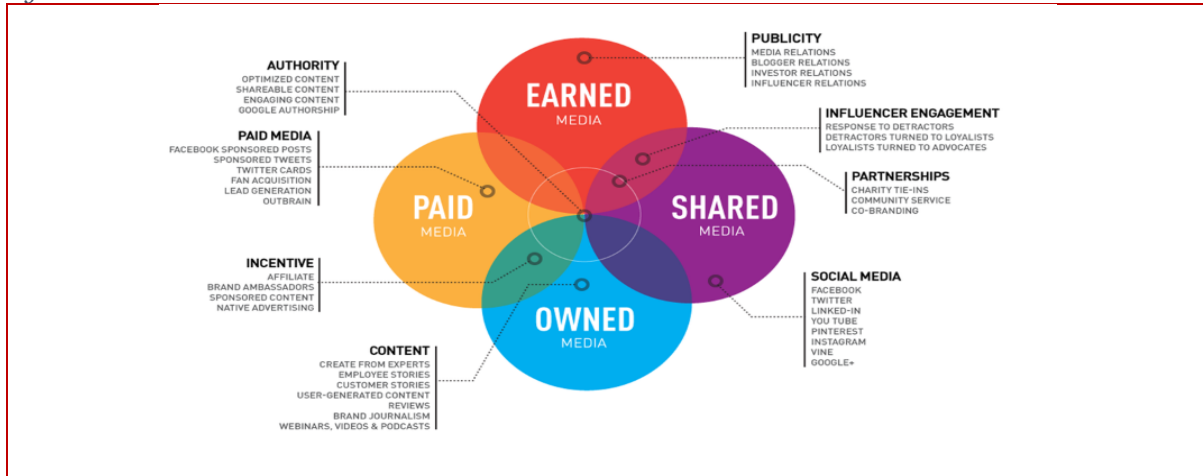
A key principle was that the communication mix would be **country-specific**, adapted and tailored to local circumstances and audiences, in order to optimise both the impact and the cost-efficiency of the

¹¹ Kantar Public, Communicating the Investment Plan for Europe and other jobs and growth initiatives, Quantitative evaluation – Baseline survey, February - March 2017

¹² As mentioned above, we estimate the overall budget for the #InvestEU campaign in its first year of activity (March 2017-18) at €20.7m. In comparison, the final contracted budget of the pilot campaign was €16m, covering 6 MS and 7 EU languages

campaign communication activities. In each country, the local market plans included for example indication on which social media would be more efficient (e.g., in countries where Twitter was not such a large platform, communication activities were to focus on Facebook). In their campaign design, the REPs were supported by the local offices of the contractor providing strategic advice on the content and media strategy and developing creative communication support activities (devising the communication toolkit).

Figure 8 The PESO model



Source: Burson Marsteller

For the **paid media channels**, generating the large-scale reach of the campaign, the focus was on media channels where cost-efficient targeting was possible, taking into account also the total budget available and the number of countries which were covered by the campaign.

Seeing that the budget did not allow for sufficient reach and/or frequency with TV advertising, priority was set on social media and online advertising. These advertisements were complemented with paid media collaborations, including advertorials and collaborations with bloggers and vloggers.

The campaign strategy set out the following mix in the total paid advertising budget:

| Paid media channel | Share |
|--|------------|
| Digital advertising | Around 45% |
| Social media | Around 30% |
| Content promotion and media cooperation | Around 10% |
| Broadcast media and billboards/posters (OOH) | Around 5% |
| Contingency and production costs | Around 10% |

Related to the **earned media coverage**, the main strategic elements that underpinned the campaign were:

- *Third-party endorsement*, engaging project promoters, investors, stakeholders and other potential advocates. These third-party endorsers, operating as multipliers, included the EC-funded project beneficiaries and ‘external’ stakeholders – government, business and citizens’ associations, and other groups identified during stakeholder audits. Their function was to strengthen the different communication activities, relaying the messages and adding credibility to the campaign in public fora and media. In the WPP strategy they were described as opinion leaders and key influencers whose opinions matter for the target audience. The strategy developed by the contractor WPP highlights the importance of the careful selection of the third-party endorsers who will resonate the

most with the defined target audience. The ones chosen must be able to engage with the target audience by acting or changing their perception and not only spread a message

- *Media relations*, with a special emphasis on local and regional media in close proximity to projects funded, by means of press briefings, onsite visits with journalists to selected projects, regularly sourcing/updates to journalists, bloggers and other influencers, and provision of material for journalistic use (photos, video, interview opportunities, infographics, etc.).

The mixed-media model underpinning the corporate campaign was to create a **synergy of paid and earned media**, in line with industry quality standards. A key objective was to promote the EC pages on social media and websites, driving earned and paid reach back to the EC's owned channels.¹³

The micro-targeting strategy foresaw for each project a two-step approach to the campaign implementation on the social media:

- First a *project-specific awareness campaign* was organised. The campaign mainly consisted of videos advertising specific projects, and the audience was targeted in a broad manner so as to maximise the number of views
- This was then followed by a project-specific *consideration phase*, which aimed to redirect qualitative audiences to the campaign website. At this stage, photo carousels and short animations were preferred. The users were re-targeted based on video views of the first phase, or through their specific interest in the topics displayed by the project or in EU and politics in general. The assumption was that this 'qualitative' audience would be more likely to engage with the campaign

An overarching narrative with a tailored storytelling

The country-specific approach in the #InvestEU campaign related also to the overarching narrative, which was translated into **country-specific messages**, adapted to the concerns and sensitivities of the Member States in which the campaign was rolled out.

The storytelling was built around **exemplary newsworthy projects** that acted as examples of "real impact" on "real citizens" and were of potential relevance and appeal to the target audience in the country. The projects were the main basis for showcasing the jobs and growth benefits of EU funding, how EU projects address common European challenges, as well as other tangible citizen benefits. Emblematic 'flagship' projects were selected to be showcased on all campaign channels, including the paid media.

In the design phase, preparatory focus groups were important in framing the content and messages for the national campaigns, providing insights on the range of topics which might interest the target audience. The selection of the projects to showcase as well as the flagship projects was based on insights from the Representations, other DGs and focus groups regarding topics of interest in each core country, to tailor the campaign to the national debate. This included reality checks on issues such as: popularity, problems, public perception and implementation issues.

3.1.4 Campaign management and administration

The #InvestEU campaign has involved a wide range of actors, from the EC corporate level, EC Representations, various cross-European and local offices within the WPP group, and locally also the EDICs. It required significant efforts on coordination and cooperation between the actors at the central and national levels, as well as among the actors involved at each of these 'horizontal' levels.

Figure 9, below, maps out the structure set in place for the governance and management of the campaign.

At the **EU level**, DG COMM and specifically 'Directorate A for strategy and corporate communication' was responsible for the overall strategy development and had as main task to ensure the consistency of

¹³ WPP media briefing, February 2017

the campaign in all the Member States with the overall strategy and narrative of the campaign. They were supported in this task by the central office of the contractor (WPP). For the zoom-in countries, the local partners of WPP were offering support and local expertise.

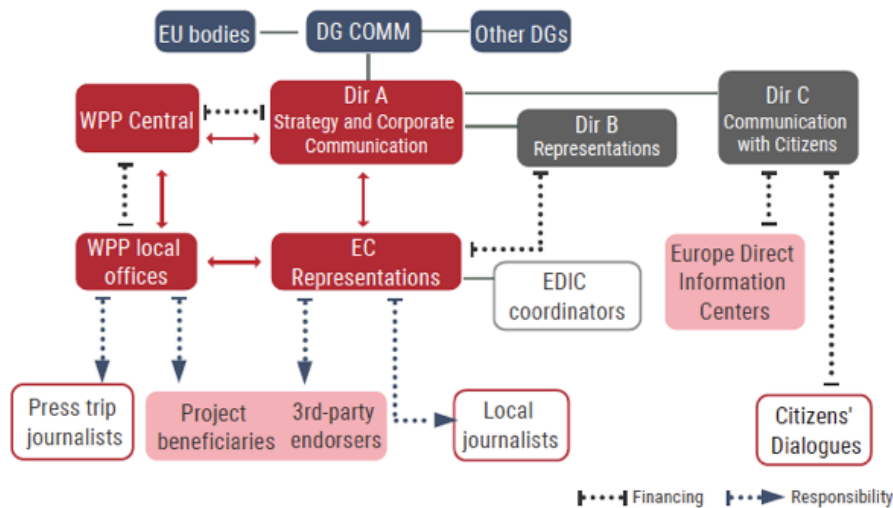
The diagram shows the involvement also of two other Directorates in DG COMM:

- Directorate B provided additional financial support to the EC REPs, based upon submission of the plans for specific campaign activities, and provided support to Dir A for the coordination of the REPs
- Directorate C issued an #InvestEU-specific call for grants for the EDICs and is the Directorate in charge also of the Citizens Dialogues

EU bodies such as the European Investment Bank (EIB) and other DGs were involved for the identification and selection of the projects to showcase.

At the **national level**, the EC Representations (REPs) were at the core of the campaign. They were in charge of the local strategy design, approval and implementation of the national campaigns, ensuring optimal alignment with the needs and specific characteristics of their country. They were supported in this task by the WPP local network offices.

Figure 9 Governance and implementation structure for the #InvestEU campaign



Source: Technopolis Group

The process for the definition and validation of the #InvestEU content, communication approaches and channels at the national level involved the EC Representations, the DG COMM Dir A, and the WPP Group, at the central and national level:

- The EC REPs were responsible for the validation of actions under the local outreach strategies as proposed by the local WPP offices
- The DG COMM Directorate A was in charge of the final validation of the content and actions in the local outreach strategies as proposed by the REPs
- The WPP Central office reported to the Dir A on the campaigns' design and activities, transferred requests, instructions and feedback from the Dir A to the local offices, and ensured the overall smooth implementation of the campaigns

3.2 Implementation of the integrated campaign

In this section we provide an overview of the communication activities that were implemented in the first year of the #InvestEU campaign and the achievements in terms of outputs produced and actors involved. In the sections below, we give an overview of the projects showcased (Section 3.2.1), the outputs of the campaign on the paid channels (Section 3.2.2), the events organised by the REPs (Section

3.2.3) the media relations established (Section 3.2.4), and the third-party endorsers (Section 3.2.5) and EDICs involved (Section 3.2.6).

3.2.1 Projects showcased

In 2017-18, in total **243 projects** were showcased, based on an evaluation of over 520 projects.¹⁴ The majority of these projects (197 or 81%) were located in the zoom-in countries¹⁵.

Table 2 shows the extensive exploitation of the projects to convey the #InvestEU message: 81% of all selected projects was covered in a “country brochure”; 57% featured also with a story on the #investEU website.

The 46 projects that relate to **non-zoom-in countries** were showcased predominantly by means of country-specific brochures (87%); these brochures were produced only for 4 out of the 12 non-zoom-in countries, i.e. Cyprus, Luxemburg, Malta and Slovakia. An additional 5 non-zoom-in countries (Croatia, Estonia, Lithuania, Slovenia, United Kingdom) had – or will have in the nearby future - a project story published on the website.

Country-specific brochures were produced also for all of the 16 **zoom-in countries**; for all of these countries, project stories were featuring on the website, available in all EU languages. The selected projects constituted the topic also for the cross-country press trips. These were all projects that were run in the zoom-in countries; most of them (14 out of 23, or 61%) were flagship projects.

Table 2 Treatment of the selected projects

| | Zoom-in countries | Non-zoom-in countries | Total | Zoom-in countries | Non-zoom-in countries | Total |
|---|-------------------|-----------------------|------------|-------------------|-----------------------|-------------|
| Listed in country-specific brochure | 159 | 40 | 197 | 81% | 87% | 81% |
| Story on website | 136 | 7 | 139 | 69% | 15% | 57% |
| Story available in all EU languages | 110 | 3 | 110 | 56% | 7% | 45% |
| Project covered in cross-country press trip | 23 | | 26 | 12% | 0% | 11% |
| Treated as flagship project | 57 | | 57 | 29% | 0% | 23% |
| Total | 197 | 46 | 243 | 100% | 100% | 100% |

Source: DG COMM data, dd. 17/04/2018

One out of three projects in the zoom-in countries (57 out of 197) was selected as **flagship project**. These projects were showcased in all media channels (‘full treatment’) and most importantly, provided the content for paid media materials. Seeing the central role of the flagship projects in the communication activities, the proper selection of these projects was fundamental. Criteria for selection were primarily the need for a human story, the potential for communication and the relatability of the project and its benefits for the target audience.

3.2.2 Outputs on the paid channels (national campaigns)

In the first year of the #InvestEU campaign, the REPs, in collaboration with the local WPP offices, produced and ‘placed’ in total **more than 7,500 paid advertising items**, ranging from billboards and print insertions to posts on social media and online/digitals ads.

¹⁴ WPP KPIs Benchmarks Update, March 2018

¹⁵ Sources: EC DG COMM data dd 17/04/2018; WPP project list May 2018

In line with the approach to tailor the communication activities to the national environment, there is a high variety in the paid media mix in the zoom-in countries (Table 3). The following picture emerges:

- France was the country with the most intense use of billboards in the campaign; the next most intense users were Italy, Finland and Germany
- Belgium was the country posting the most paid social media posts
- Bulgaria, Greece and Hungary were active especially in the posting of online/digital ads
- Most of the countries were similarly active in placing print insertions; but print buying was highest for Finland, Italy, and Poland

Table 3 Outputs on the paid channels

| | Print insertions | Online/digital ads | Posts in social media | OOH:Billboards/Posters |
|--------------|------------------|--------------------|-----------------------|------------------------|
| Austria | 19 | 14 | 22 | 75 |
| Belgium | 23 | 8 | 60 | 185 |
| Bulgaria | 25 | 64 | 22 | 136 |
| Finland | 54 | | 20 | 458 |
| France | 11 | 4 | 21 | 3,958 |
| Germany | 35 | 28 | 14 | 425 |
| Greece | 19 | 68 | 28 | 120 |
| Hungary | 23 | 45 | 15 | |
| Italy | 53 | | 28 | 444 |
| Latvia | 43 | 30 | 19 | |
| Netherlands | 31 | 13 | 17 | 232 |
| Poland | 56 | 38 | 28 | 143 |
| Portugal | 18 | 29 | 21 | 201 |
| Romania | 30 | | 7 | |
| Spain | 38 | 19 | 22 | |
| Sweden | 9 | | 14 | 197 |
| Total | 487 | 360 | 358 | 6,574 |

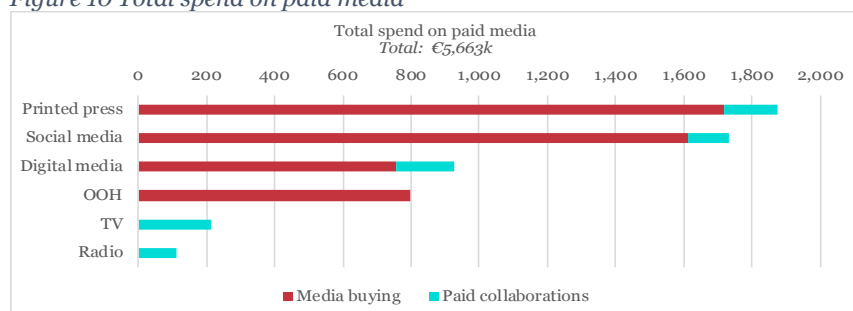
Source: WPP KPI report June 2018

These paid advertising activities were complemented with **paid collaborations with media**, most often in the form of online advertorials and TV infomercials. Taking a more innovative approach, in 12 ‘zoom-in’ countries paid collaboration agreements were established also with 17 local bloggers, vloggers or Instagram influencers.

Figure 10 illustrates the **synergy** that was established between these two components of the paid media strategy: whereas the focus of the media buying budget was especially on the printed and social media (35% and 33%, respectively), paid media collaborations regarded additional television coverage and the digital media (28% and 22%, respectively).

Overall, the printed press and social media accounted for the largest shares of the spend on paid media (33% and 31%, respectively), 16% was spent on ads in the digital media, 14% on OOH (billboards and posters), and 6% on TV and radio (jointly and exclusively through paid media collaborations)

Figure 10 Total spend on paid media



Source: WPP KPI report June 2018

3.2.3 Events organised

Based on the data in the REPs’ E&A database¹⁶, the REPs also organised a total of **232 events** (Table 4).

The format of these events and their target audiences differed among the countries:

- Austria, Hungary and Latvia organised conferences and seminars as well as consultations with political, economic and civil society actors
- Bulgaria and Greece focused on organising meetings or workshops, involving a high number of journalists

No specific information is available on the profile of the journalists that were reached in these nationally-organised events. It should be noted, also, that the data should be considered as estimates as the reporting by the REPs is incomplete.

Table 4 Events organised in the zoom-in countries

| | Total number events | N participants (or Footfall where available) |
|-------------|---------------------|--|
| Austria | 40 | 32,148 |
| Belgium | 11 | 3,261 |
| Bulgaria | 30 | 3,200 |
| Finland | 10 | 2,806 |
| France | 9 | 884 |
| Germany | 9 | 356 |
| Greece | 31 | 7,500 |
| Hungary | 17 | 10,682 |
| Italy | 11 | 170 |
| Latvia | 12 | 10,971 |
| Netherlands | 4 | 27 |
| Poland | 12 | 351 |

¹⁶ Database collecting the data on the REPs’ communication activities as reported by the REPs to Unit B2

| | Total number events | N participants (or Footfall where available) |
|--------------------------------|---------------------|--|
| Portugal | 13 | 1,574 |
| Romania | 1 | 200 |
| Spain | 18 | 679 |
| Sweden | 4 | 228 |
| Total zoom-in countries | 232 | 75,037 |

3.2.4 Media relations

Next to the events and press briefings organised at the national level, 9 **cross-country press trips** were organised in 2017-18, involving a total of 167 journalists (Figure 11). These theme-based press trips, organised at the European level in close collaboration with the REPs, intended to give the journalists a view of the effects of EU projects funded in other countries than their home countries. The topics of healthcare and social inclusion were covered twice, attracting each time also the highest number of journalists.

Figure 11 Cross-country press trips in 2017-18

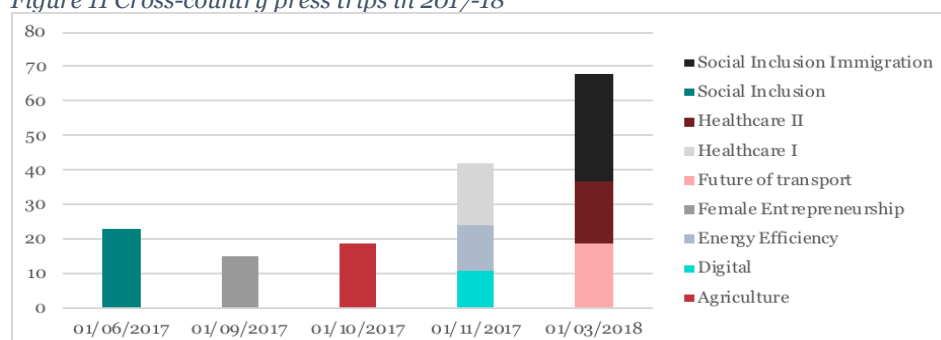
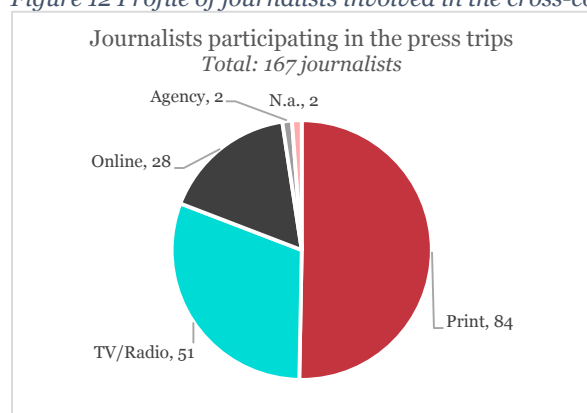


Figure 12, below, shows the composition of the journalists that took part in the nine press trips organised in 2017/2018. The printed press accounted for half of the journalists involved; another third of the journalists involved were active in TV or radio.

Figure 12 Profile of journalists involved in the cross-country press trips



Differences per country were as follows:

- Bulgarian, French and Portuguese journalists were mainly active in TV/radio

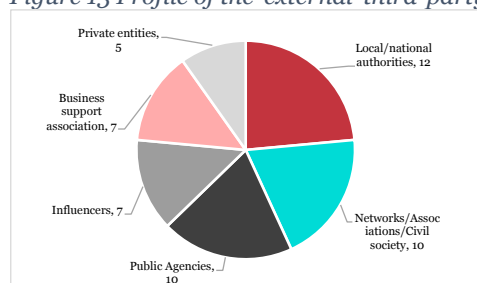
- Austrian, Belgian, Dutch, German and Italian journalists predominantly belonged to the printed press
- Finland was the country with the highest number of journalists active in the online media

3.2.5 The use of third-party endorsement

Third-party endorsement was considered to be an important component in the national communication strategies in the zoom-in countries in order to enforce the credibility of the messages conveyed.

Third-party endorsers included the beneficiaries of the selected projects, as well as a range of actors in the regional and local environment. Based on available data, a total of 51 ‘external’ third-party endorsers were involved in the national campaigns, next to 32 project beneficiaries (‘internal’ endorsers) (Figure 13). The ‘external’ third-party endorsers were mainly organisations in the public sector, i.e. public agencies and local/national authorities (20% and 24%, respectively). ‘Influencers’ are opinion leaders in the country, such as politicians, actors, or famous researchers.

Figure 13 Profile of the ‘external’ third-party endorsers



The breakdown at country level shows remarkable differences among the zoom-in countries in terms of level of involvement of the ‘external’ third-party endorsers. Small countries such as Austria, Belgium and Finland involved the highest number of endorsers, similar to Spain.

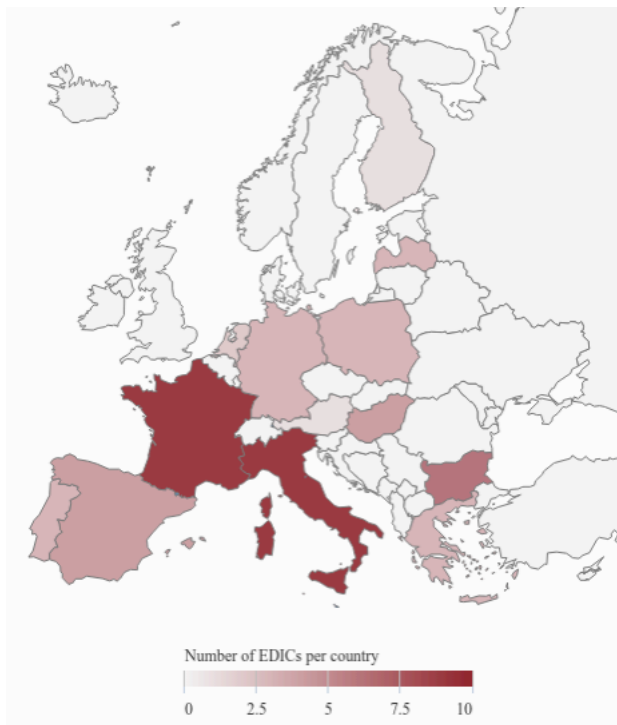
Table 5 Profile of the ‘external’ third-party endorsers in the countries

| | Local/national authorities | Public Agencies | Networks/Associations | Influencers | Business support associations | Private entities | Total |
|-------------|----------------------------|-----------------|-----------------------|-------------|-------------------------------|------------------|-------|
| Austria | | 3 | | | 1 | 2 | 6 |
| Belgium | | 2 | | 3 | 3 | | 8 |
| Bulgaria | | | | | | 1 | 1 |
| Finland | 5 | | | 2 | 1 | | 8 |
| France | | 1 | | | | 1 | 2 |
| Germany | 1 | | 2 | | | | 3 |
| Greece | 2 | | | | | | 2 |
| Hungary | 1 | | 1 | | | 1 | 3 |
| Italy | | | 2 | 1 | | | 3 |
| Netherlands | | 1 | 1 | | | | 2 |
| Poland | | | | 1 | | | 1 |
| Portugal | | 3 | | | 1 | | 4 |
| Spain | 2 | | 4 | | | | 6 |

| | Local/national authorities | Public Agencies | Networks/Associations | Influencers | Business support associations | Private entities | Total |
|--------------|----------------------------|-----------------|-----------------------|-------------|-------------------------------|------------------|-----------|
| Sweden | 1 | | | | 1 | | 2 |
| Total | 12 | 10 | 10 | 7 | 7 | 5 | 51 |

3.2.6 EDICs involved

The final report on the activities of the EDICs in support of the #InvestEU campaign indicates the involvement of 67 EDICs located in 21 Member States. These EDICs had participated in a call for grants launched in autumn 2016; their activities started in February 2017.



In total, 67 EDICs were funded with an overall budget of €796,824.

The majority of the EDICs (51 out of 67) were located in the zoom-in countries. The map shows that these EDICs were close to evenly distributed over the zoom-in countries in Central and Eastern Europe (16 EDICs), Northern/Western Europe (16 EDICs), and Southern Europe, i.e. Greece, Spain, Italy and Portugal (19 EDICs).

The map also shows a strong concentration of the EDICs in a number of countries, though. Both in Italy and France, 9 EDICs were involved, in Bulgaria 6, compared to, for example, 4 EDICs in Spain and 3 EDICs in Germany and Poland.

In Austria and Finland, only 1 EDIC was involved in the campaign.

We classified the EDICs into five groupings, reflecting the categorisation used in the Evaluation of the EDIC activities¹⁷

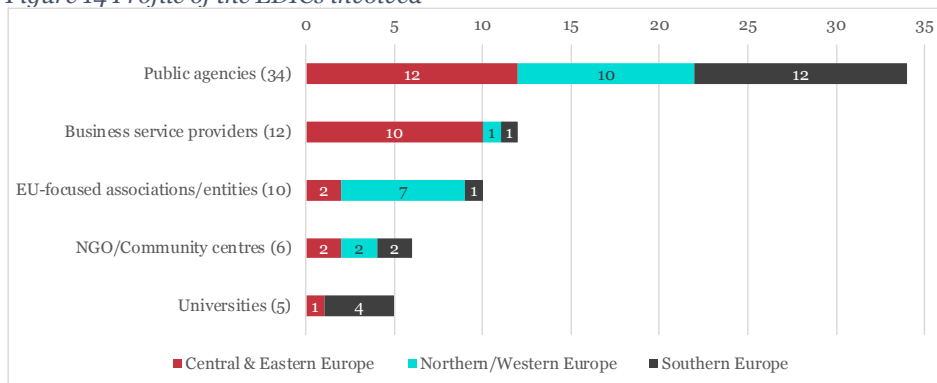
- Public agencies - local institutions with a clear information provider function (e.g. libraries) or public agencies such as the local development agencies
- EU-focused associations or entities – organisations that have the provision of information on the EU as their core function (e.g. ‘La Maison de l’Europe’ in France) or are content focused on EU themes (e.g. Young Federalist, European foundation).
- NGOs and Community centres - associations thematically or content-wise focused on local communities
- Business service providers – such as Chambers of Commerce, general or specific business associations or incubators
- Universities - research centres that take up an information function and are tightly linked to the business and/or institutional environment

¹⁷ Mid-term evaluation of Europe Direct Information Centres (2009-2012), GHK and Technopolis, 2012

Half of the EDICs involved in the #InvestEU campaign (34 out of 67) were public agencies; the second most important group were Business service providers (12 out of 67, or 18%).

The profile of the EDICs involved varied depending on their geographical location. The business service providers involved were almost exclusively located in Central & Eastern Europe (C&EE); EU-focused associations were predominantly located in Northern/Western Europe (NWE); universities were mainly located in Southern Europe (SE).

Figure 14 Profile of the EDICs involved



Source: EDICs final reports

4 Answers to the evaluation questions

In this chapter we report on our assessment of the #InvestEU campaign related to the evaluation criteria set for this evaluation exercise, i.e. the relevance of the campaign (Section 4.1), its effectiveness (Section 4.2), the efficiency of the communication activities (Section 4.3), their coherence (Section 4.4), EU Added Value (Section 4.5), and the sustainability of the effects (Section 4.6).

4.1 Relevance of the campaign

The ToR defined the evaluation question related to relevance in terms of “the extent to which the communication activities were relevant to the EU citizens, EU businesses and to the Commission's stakeholders”.

Taking into account one of the key principles underlying the campaign strategy, i.e. the tailoring of the campaign to the national context, the relevance of the campaign depended on the extent to which the message and narratives resulted salient to the EU citizens, responding to their needs and concerns.

One of the main lessons learned from the evaluation of the pilot campaign was the importance of a tailored narrative, close to the target groups’ experience and interests and working at an emotional level, in line with their views and motivations (see also Section 2.3.1, above). The evaluation also stressed the importance of focusing the message on how the citizens *personally* could and do benefit from EU support. A story-based approach tailored to the needs and concerns of the (local) target audience was considered to be at the core of public awareness campaign success.

In the sections below we assess the extent to which the campaign responded to the needs and concerns of the citizens by focusing on the projects selected and the areas of benefits showcased (Section 4.1.1), the quality of the campaign materials in terms of their capacity to convey the desired message (Section 4.1.2), and the choice of communication channels used to convey them (Section 4.1.3).

4.1.1 The projects selected and benefits showcased

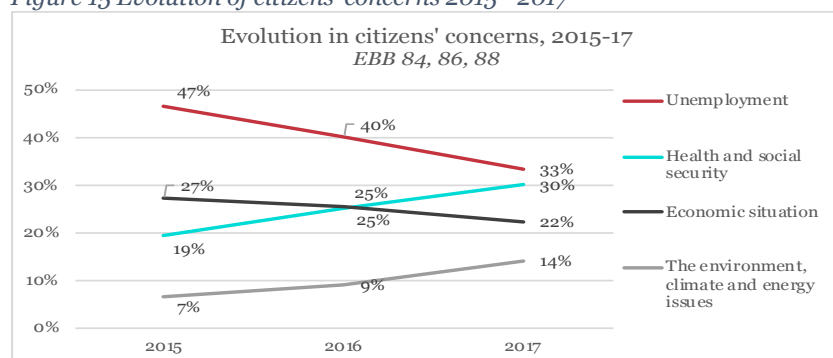
The needs and concerns of the European citizens

In Section 2.2.1, above, we referred to the Eurobarometer survey in 2015 on the concerns of the EU citizen that constituted the background for the #InvestEU campaign.

Based on the Eurobarometer surveys in the period 2015-2017, the issue of unemployment was considered a main challenge by about 30% of the European citizens (Figure 15).. Jobs and growth – key aspects of the campaign’s focus – were (still) seen as important issues their countries were facing.

However, the surveys also confirmed the trend visible already in 2015, i.e. the increasing importance of topics such as immigration, health and environment as a reason for concern.

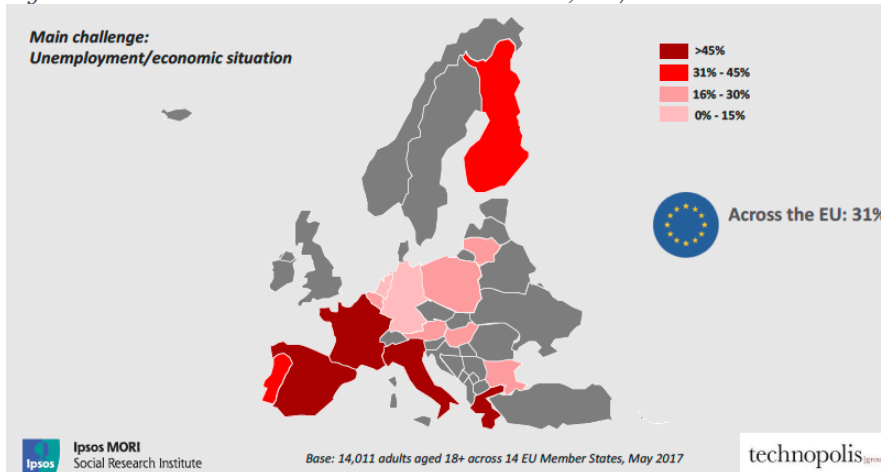
Figure 15 Evolution of citizens’ concerns 2015 - 2017



Source: Eurobarometer 84, 86 and 88 survey – treatment Technopolis Group

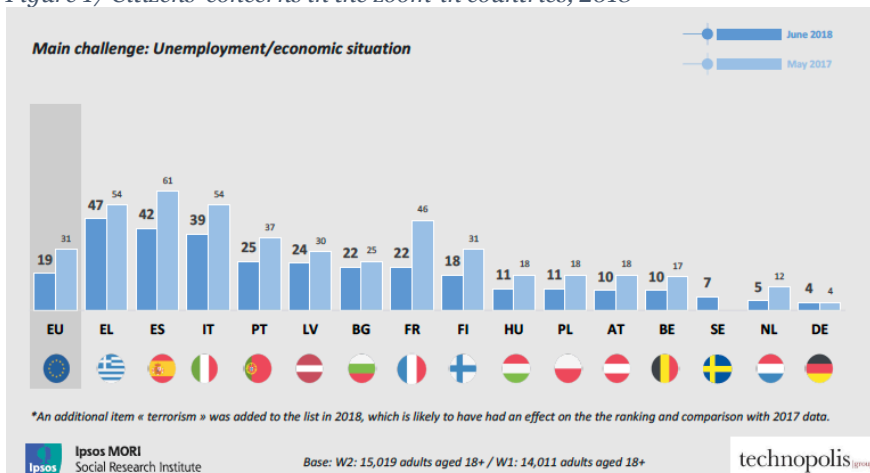
At the **national** level, the Ipsos Mori polling confirmed the strong diversity among the 14 EU Member States surveyed. In 2017, unemployment and the economic situation was mentioned most often in Spain, France, Italy and Greece (Figure 16). Dutch and German respondents were the least worried. The Ipsos Mori polling in 2018 showed that concerns about jobs and economic growth remained high in Greece, Spain and Italy and low in Netherlands and Germany – as well as Sweden*

Figure 16 Citizens' concerns in the zoom-in countries, 2017



Note: at the time of the polling, only 14 Member States participated in the campaign as zoom-in countries. Source: Ipsos Mori, polling dd. May 2017

Figure 17 Citizens' concerns in the zoom-in countries, 2018



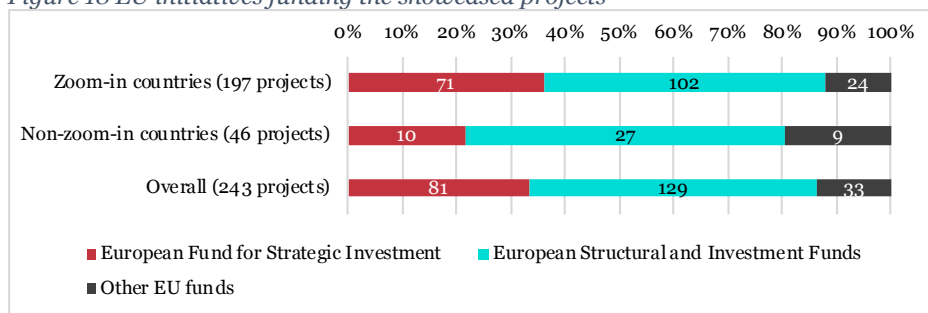
Note: Romania (the 16th zoom-in country) was not covered in this polling. Source: Ipsos Mori, polling dd. July 2018

EU funding covered

As mentioned in Section 3.1.1, above, the focus of the #investEU campaign narrative was on the EU funding in favour of jobs, growth and investment, in the context of the Investment Plan for Europe and other EU funding initiatives.

Figure 18, below, shows that the projects showcased in the #InvestEU campaign were funded mainly by the **European Fund for Strategic Investment (EFSI)**, i.e. the fund related to the Investment Plan for Europe (81 out of 243 projects, or 33%) and the **European Structural and Investment Funds (ESIF)** (129 out of 243 projects, or 53%); 14% of the projects were funded through other EU funds.

Figure 18 EU initiatives funding the showcased projects



Source: DG COMM data, dd. 17/04/2018

The distinction between the sources of funding for the showcased projects is important because it is one of the factors influencing the narrative in terms of **area of benefit for the EU citizen** deriving from the funding. In fact, while all EU funding initiatives aimed at supporting the development of the European economy, they differed in terms of **areas of intervention**:

- The *European Fund for Strategic Investment (EFSI)* is the financial pillar of the Investment Plan for Europe. Launched jointly by the EIB Group (the European Investment Bank and European Investment Fund) and the European Commission, the objective is to overcome current market failures by addressing market gaps and mobilising private investment. It helps to finance strategic investments in key areas such as infrastructure, research and innovation, education, renewable energy and energy efficiency as well as risk finance for small and medium-sized enterprises (SMEs)¹⁸
- The *European Structural and Investment Fund (ESIF)* is jointly managed by the European Commission (DG REGIO) and the EU Member States. It consists of 5 different funds, four of which have projects showcased in the #InvestEU campaign¹⁹:
 - The European Regional Development Fund (ERDF), which provides support for the development and structural adjustment of regional economies, economic change, enhanced competitiveness as well as territorial cooperation throughout the EU (98 projects)
 - The European Social Fund (ESF) which supports employment-related projects throughout Europe and investing in Europe’s human capital, as well as combats all forms of discrimination (16 projects)
 - The Cohesion Fund (CF), which funds transport and environment projects in less-developed Member States (8 projects), and
 - The European Agricultural Fund for Rural Development (EAFRD), which focuses on resolving the particular challenges facing EU's rural areas (7 projects)
- The *other EU funds* for which projects were showcased included: the Framework Programme for R&I (14 projects or 6%); TEN, the Trans-European Transport Network (5 projects or 2%); LIFE, the EU's financial instrument supporting environmental, nature conservation and climate action projects (5 projects or 2%), and Erasmus+ (4 projects or 2%).

When categorising the projects in the zoom-in countries based on the **key topics** they cover, we note that about half of the projects (47% overall) addressed issues related to innovation and development and about one in five (18% overall) related to fostering education and employment. Projects funding the development of infrastructure and addressing issues related to sustainable development accounted overall for 13% of the projects (each). Finally, projects in the sphere of healthcare and social inclusion accounted for a share of 8%.

¹⁸ Source: http://ec.europa.eu/growth/industry/innovation/funding/efsi_en

¹⁹ Source: https://ec.europa.eu/info/funding-tenders/funding-opportunities/funding-programmes/overview-funding-programmes/european-structural-and-investment-funds_en

Compared to the general pattern in the zoom-in countries, the flagship projects covered topics related to the societal challenges to a higher extent (~30% of the flagship projects).

Figure 19 Key topics covered by the showcased projects



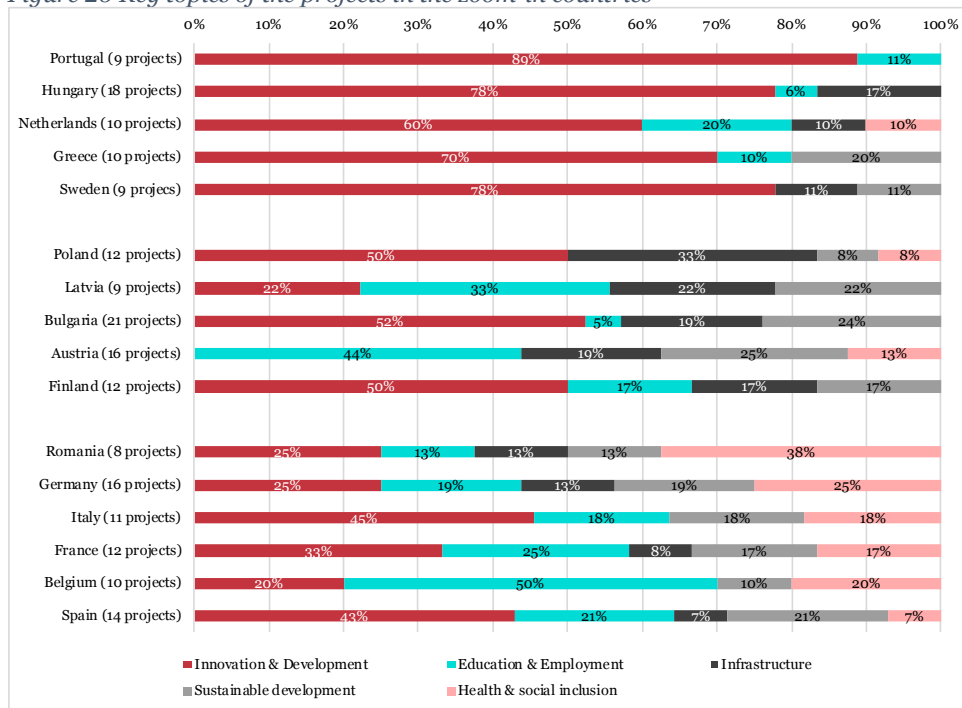
Source: DG COMM data, dd. 17/04/2018, Technopolis elaboration

The patterns emerging at the country level show strong differences, illustrating the highly tailored approach adopted by the EC Representations in terms of content of the conveyed message.

We can identify three groups of zoom-in countries:

- A first group of countries focuses on projects intervening in areas directly related to market failures influencing economic performance (innovation and development, and education and employment)
- A second group (including Poland, Latvia, Bulgaria, Austria and Finland) emphasised infrastructure projects more than average (e.g. mobility and transport infrastructure)
- A third group focused on projects that can be expected to lead to benefits in the sphere of societal challenges (sustainable development and health & social inclusion)

Figure 20 Key topics of the projects in the zoom-in countries



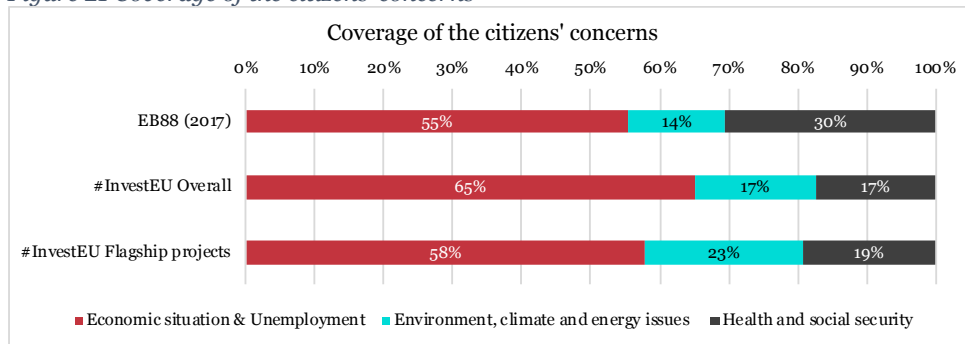
Source: DG COMM data, dd. 17/04/2018, Technopolis elaboration

Addressing the citizens' concerns

We can estimate the extent to which the narratives in the national campaigns were aligned with the interests of the target audiences by categorising the projects showcased along the main areas of concerns of the European citizens, based on the 2018 Eurobarometer survey. Seeing the strong interrelation between issues regarding “the economic situation” and those regarding “unemployment” from a public intervention perspective, making the distinction between projects addressing issues in one or the other area rather difficult and questionable, we combined the data related to these two areas of citizens' concerns.

Figure 21, below, shows a very good alignment of the showcased projects' focus with the citizens' concerns in 2017, especially in the case of the flagship projects. The campaign reached an **optimal balance** in its coverage of projects addressing issues in the economic and societal challenges spheres, even though there was room for a more pronounced showcasing of benefits in the area of health and social security.

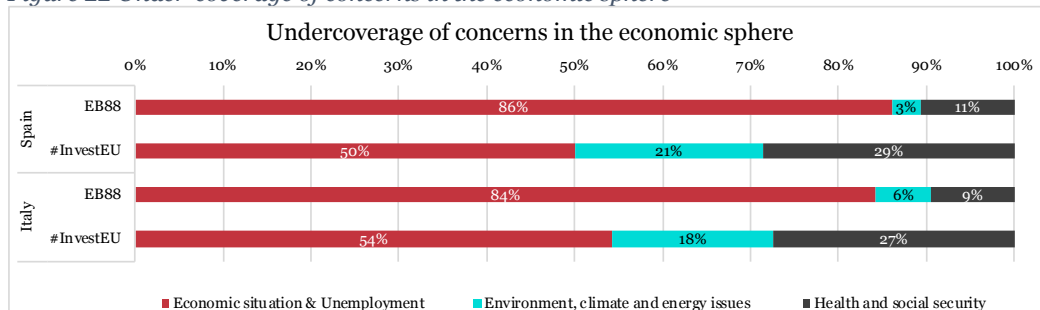
Figure 21 Coverage of the citizens' concerns



Source: DG COMM data, dd. 17/04/2018, Technopolis elaboration

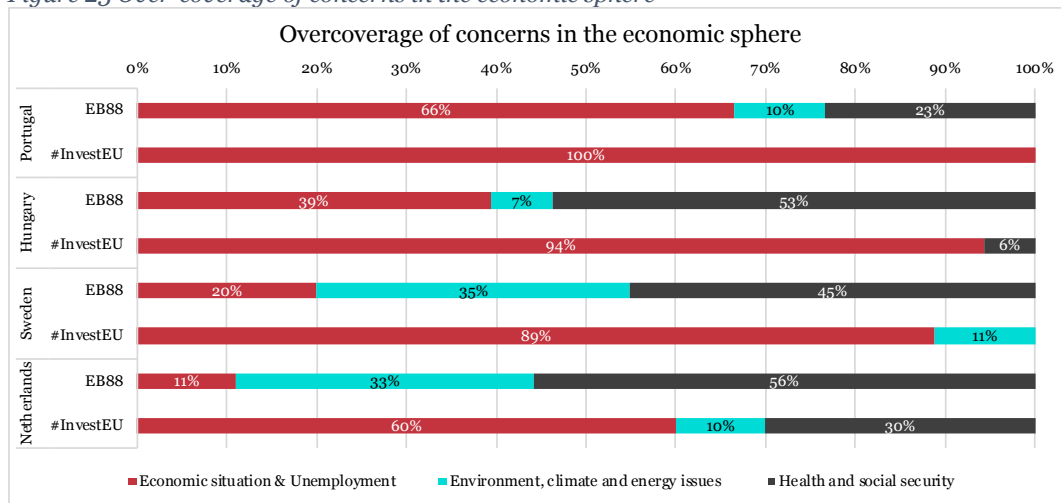
At the national level, we note a similar positive alignment for the campaigns in 10 out of the 16 zoom-in countries. Issues appear, however, in relation to the campaigns in Spain and Italy where the citizens' highest concerns regarded especially the high unemployment and the economic situation in general; one would therefore have expected a stronger emphasis on benefits for the citizens' lives in those spheres (Figure 22). In Portugal, Hungary, Sweden and to an extent, the Netherlands, instead, there was a less positive balance in the showcasing of benefits deriving from EU investments in the societal challenges sphere (Figure 23).

Figure 22 Under-coverage of concerns in the economic sphere



Source: DG COMM data, dd. 17/04/2018, Technopolis elaboration

Figure 23 Over-coverage of concerns in the economic sphere



Source: DG COMM data, dd. 17/04/2018, Technopolis elaboration

The possible reasons for these apparent mismatches are various. In the case of Italy and Spain, for example, a close collaboration was established in the campaign between the REPs and the EDICs that had been awarded a grant for communication activities in the context of this campaign (outside of the #InvestEU campaign budget, see Section 3.2.6, above). In Italy, a clear division of labour was established, with the EDICs specifically set in charge of the communication on benefits in the economic sphere. A similar approach was visible also in Spain, where the activities of the EDICs constituted the cornerstone for the campaign at the regional level.

In the case of Portugal, Hungary, and Sweden (and to an extent the Netherlands), a common denominator was the (wrongful) perception of an expected continuity with the first phase of the “information and communication sequence on the delivery on jobs, growth and investment” where the unique focus was on the Investment Plan and its activities in the economic sphere (see Section 3.1.1., above).

The views of the interviewees

The general opinion was that the #InvestEU campaign through its tailored approach and its focus on the human aspect and the concrete benefits for the EU citizens marked a breakthrough and highly appreciated shift in the EU communication to the citizens. A returning comment was that such a communication was highly needed in current times, and should be a continuous effort, not a one-off campaign.

The interviewees stressed the importance of the flexibility in the choice of projects shown in the #InvestEU campaign, prioritising the alignment with the national context over the coverage of specific EU investment funds. It allowed for focusing the main narrative on related topics of interest such as innovation, support to education and skills training, projects in the field of healthcare or cultural projects etc., in countries where a more restricted focus on job creation was less adequate (e.g. the net contributing countries).

A frequent comment of the interviewed REPs and local contractors was also that they found it difficult to communicate on growth, investment, and employment in an attractive and understandable manner, especially to young people. Issues emerging from that perspective are covered in the next section.

4.1.2 Quality of the campaign materials

Results from the focus groups organised in zoom-in countries as part of this evaluation showed some issues with respect to the quality of some of the paid advertising materials actually used in the campaign, some of which were confirmed also during the interviews conducted during the evaluation.²⁰

Content of the campaign material

Participants in the focus groups were not always clear on the **intended audience** for each example of campaign materials. Sometimes they felt that materials seemed to be targeted at government officials or professionals in the sector featured in the advertisement. In some cases, the focus on a specific location meant participants felt the communications material would only be relevant for those in a specific city or local area and might not work elsewhere.

“There is something that seems odd on the poster is that we speak “in France the EU invests” and we just see Paris targeted.” - France

For example, in Bulgaria the billboard poster on the Sofia metro did not feel applicable to those outside the capital, who would not see investment in public transport in their region; in Belgium videos on high-tech firms in Flanders (Flen Pharma and IMEC) did not feel relevant or credible to those in Brussels. Participants did not always feel the link to the EU was clear, and felt that the EU logo should be more prominent on materials.

Participants tended to be more positive about materials that align with **topical issues**: in Greece the Waste Management video (recycling), in Finland the Kohtaamo project (on youth unemployment) and in Bulgaria the Rose Oil video were all well received as they chimed with current debates at the top of people’s minds. This confirmed one of the findings of the pre-test focus groups, that ecology-oriented projects do quite well, as citizens are able to identify their personal benefit.

“The campaign materials are credible because it is a real person. I am convinced that the money will be wisely used.” - Latvia

Telling a **human success story** was also supported by participants who felt this helped to demonstrate the real-life impact of EU investments and overcame the perception that the EU is distant and irrelevant to ordinary people’s lives. This also confirmed the findings of the pre-test focus groups, that an example of a local or family company made for an engaging and convincing message.

For example, the video, depicting local farmers as ‘Arctic Warriors’ in Finland was regarded as relatable due to the inspiring Finnish characters in it and the focus on Northern Finland, which gave the message an inclusive feel. Likewise, participants liked the way the Alfeios Rodi video in Greece showed the full process of juice making, showing the impact of investment on a community and motivating people to stay and work in the countryside: “I liked the execution. People were smiling, the product was very appealing, made you want to drink it.” While the ad was not designed to sell the juice, such an emotional reaction is an indication that the content was found relatable and engaging by such audience members.

However, focusing on a single sector or individual was thought to make the communications feel **too specific or specialist**, something participants in Belgium felt about the IMEC video. Participants in Bulgaria also questioned the credibility of the story told in the video on a small business producing rose oil, asking whether it represented a true story and whether opportunities were really open to all.

This confirmed another finding of the pre-test focus groups, that the message is weakened if the economic advantage or added value of the funding or project is unclear. It also confirms that many ads have both positive and negative aspects in terms of audiences’ qualitative reactions – the Rose Oil ad was liked for its topicality but received sceptically in terms of its real impact. The nature of focus groups means we cannot make conclusions about which tendency, positive or negative, is stronger for each ad,

²⁰ Detailed country-specific findings from the focus groups are provided in Annex 6 to this final report (separate report)

but they do offer explanations of the reasons why an ad may or may not have been effective (as found from other evidence, such as engagement metrics or polling).

Participants felt that the videos often contained **too little information**, reducing their trust in the stimulus due to bold and vague claims with little substantial narrative or evidence supporting them. Participants wanted to learn more about the beneficiaries and impact of the investments. Others wanted to see greater detail on how to apply for grants and investments either through hyperlinks to websites with further information or more information in the video itself.

In Italy the Pompei poster included detailed facts and figures about the project (including the amount of investment in euros). This left participants feeling they were clear about the message of the campaign and understood more about EU investments as a result. Greater use of facts and figures was also something participants in other countries wanted to see in future campaigns.

Also the interviewed journalists expressed a need for more facts and figures, which they considered key for the story to be ‘news worthy’.

Campaign slogan/strapline

Results from the post-test focus groups organised in the zoom-in countries (two groups held in each region of Belgium, Bulgaria, Germany, Greece, Finland, France, Italy, Latvia and Poland) as part of this evaluation showed participants across countries **wanted to see greater specificity** in the message of the strapline “opportunity starts here”. Participants asking where “here” referred to - is it the local area, the country or the EU as a whole? In Latvia, France and Greece, focus group participants said the translation of the strapline did not always suit the local language, or it had multiple meanings.

In Latvia, participants favoured the line “opportunity starts here” as it translated directly into Latvian in contrast to words like “innovation” and “mobility” which felt foreign and did not have direct translations, increasing the perception of distance from the EU. As another example, one participant in Bulgaria said, “*there are so many foreign words here, I don’t know if people will understand this.*”



In several cases including Germany, Greece and Italy the straplines used were seen as **vague and out-of-touch** with issues affecting participants. For example, words such as ‘innovation’ and ‘opportunity’ were often seen as buzzwords that are used in advertising and rarely reflect the tangible effects of EU investment that participants might benefit from.

In addition, the straplines were seen as inaccessible for participants, who did not feel that they had access to ‘opportunities’ or ‘innovations’. The result of slogans that were vague and untargeted left participants with more questions regarding EU investment than they had had before.

Interviewees criticised the campaign slogan “opportunities start here” for being too much a “business style” communication; it was perceived as a slogan for investors and those that might benefit – not for citizens.

Quality of execution

Participants emphasised the importance of the **images selected** in the campaign and the quality of production of the materials. In France, Germany, Belgium and Finland the photos used were seen as unengaging and not reflective of the message of the campaign. For

“If I had not seen the first three seconds of the movie, where the logo of the European Union was shown, I would have thought it was an advertisement for a real estate development company.” – Poland

example, in France the photo used in the Quadrivium poster was perceived as old-fashioned and contrasting with the high-tech message.

In Germany and Belgium, participants recognised the businesses advertised in the stimuli, while elsewhere, participants were familiar with the features presented: specific local metro stations, airports, hospitals, and world heritage sites (e.g. Riga Airport, Sofia Metro, Torun Hospital, Pompei).

There were differences in preference for what channel the stimulus should be delivered in. In Italy, a poster was seen to have a more direct impact allowing participants to digest all the needed information at once, where a poster provided information on top of an emotive backdrop of Pompei. Whereas in Germany and Latvia, participants preferred the storytelling format of a video on social media.

“Here, such serious, difficult things are presented in a light, easy-to-understand form. Also the music in the background is light and quiet. Stylish and well-designed.” – Latvia

While there were no generalisable views on the best channel for the campaign, participants in most countries felt they would see posters in places where they would stop to wait around and read the adverts such as the metro, train stations, and in bus stops. Participants felt the more industry or sector focused adverts would be seen in: magazines (e.g. in Germany where the poster was about a start-up in fashion), in airports (in Latvia, where the poster was focused on the development of Riga airport), in universities and schools (in Greece and Germany) and poster walls.

4.1.3 Tailoring the use of the communication channels

A key component of the #InvestEU communication strategy was the use of the PESO model, combining paid, earned, social, and owned media channels for the communication activities (see Section 3.1.3, above). While the campaign strategy set out shares in the total paid advertising budget for the specific channels to be used, preferring the use of online and social media, the overarching concept of a tailored approach was valid also in this case.

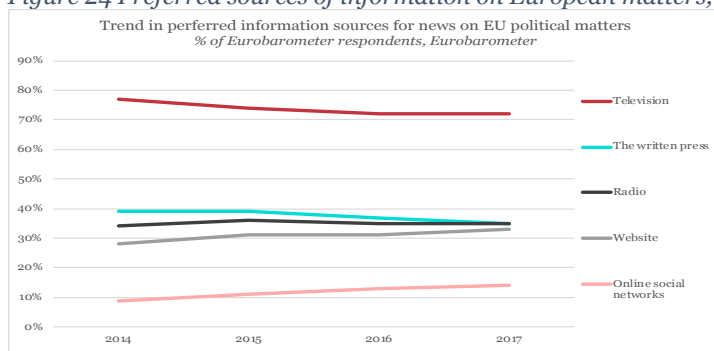
The media mix used for the campaign in the zoom-in countries was decided upon at the national levels, based on a preceding context analysis and reflecting the strategy set by the REPs, in collaboration with the local contractor and approved by DG COMM. Our analysis shows that these strategies were to an extent flexible, depending on the external environment and opportunities emerging. A rigid detailed analysis of “intentions versus reality” seems therefore inappropriate and too complex to be conducted within the remit of this study.

Our analysis in this section focuses on the ongoing alignment of the **paid media channels** chosen in the zoom-in countries with the citizens’ preferred sources of information on EU matters (based on Eurobarometer data) as well as their main sources of information about EU investments, based on the findings from the two polls conducted by IPSOS MORI in the context of this study (pre- and post-campaign, dd. May 2017 and July 2018 respectively). The analysis focuses on the paid media outputs only (see Section 3.2.2, above)

Main sources of information for the citizens

Data from a series of Eurobarometer over time show the growing importance of online and social media as sources of information on EU matters (Figure 24). This trend is common to all countries. Television and radio keep on being the preferred source of information, though, in all countries.

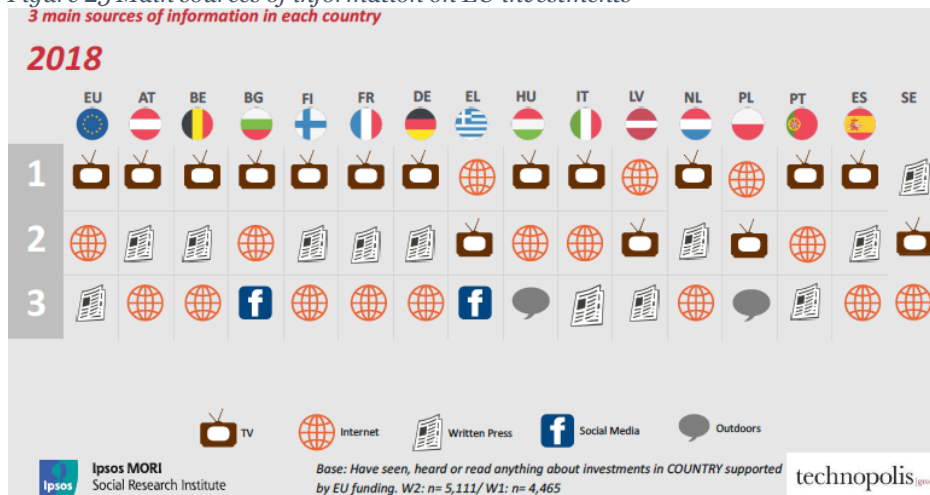
Figure 24 Preferred sources of information on European matters, 2015-17



Source: Eurobarometer 84, 86 and 88 – Treatment Technopolis Group

As for the citizens’ main sources of information on EU investments, the IPSOS MORI pollings inform that TV was the main source of information in most countries, followed by the Internet and written press. Exceptions included Greece, Latvia and Poland, where the Internet was the main source, and Sweden where it was the written press. Social media was mentioned as the third most important information source in Bulgaria, Greece and Poland, but was not among the top three information sources in the remaining countries surveyed.

Figure 25 Main sources of information on EU investments



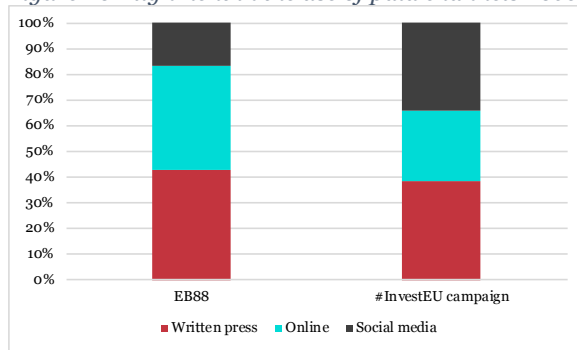
Source: IPSOS MORI polling, July 2018

Assessment of the alignment

Overall, the #InvestEU campaign shows a good alignment in its use of the media channels compared to the preferred channels for information on EU matters among the citizens (Figure 26). There is an optimal alignment in its use of the written press, while there is a misbalance in its use of internet-based channels where an over-emphasis on the social media can be noted - to the expense of the digital media.

A possible explanation for this apparent misalignment is the important role that was attributed to the social media in order to allow for a micro-targeting of the campaign.

Figure 26 Alignment in the use of paid channels - overall



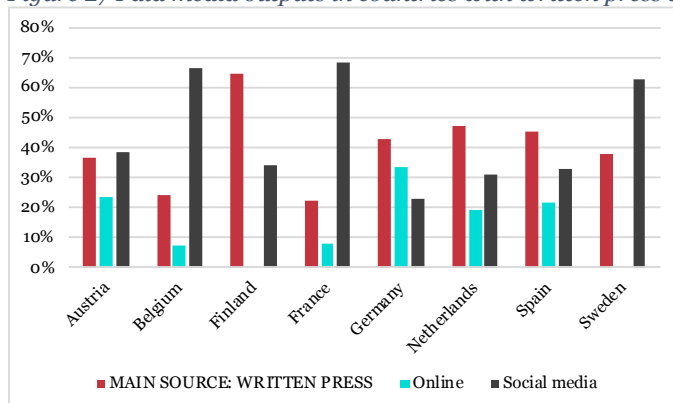
Sources: WPP Key performance metrics, June 2018; Eurobarometer standard survey 88, 2017

A similar picture of misbalance in the use of the social and digital media is visible when comparing the use of paid media channels in the national campaigns with the data on the main sources of information on EU investments.

Figure 27 illustrates the paid media strategy in the eight zoom-in countries where according to the polling data the written press was the main source of information (after TV). In all of these countries, the digital media were the second most important source.

The graph shows an appropriate priority on the written press in most countries (with the exception of Belgium and France). A full alignment with the citizens' preferences is visible only in the case of Germany, though. In all of the other countries – and especially in Belgium, Finland, France and Sweden - there was an over-emphasis on the social media.

Figure 27 Paid media outputs in countries with written press as main source of information

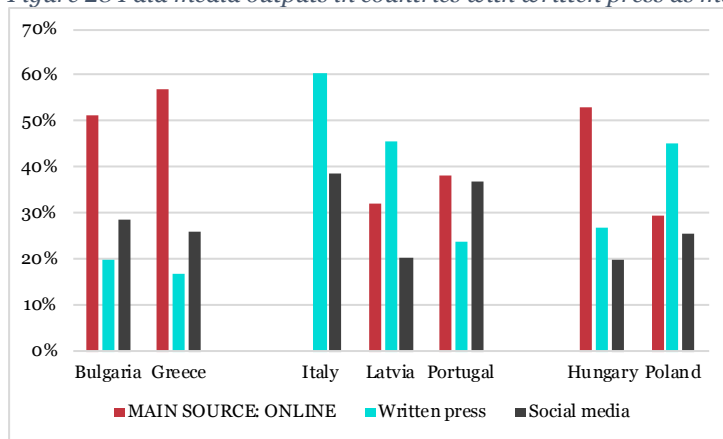


Source: WPP Key performance metrics, June 2018 (share of total outputs)

Among the seven countries where according to the Ipsos Mori polling digital media was the main source of information, four countries set priority on the digital media, i.e. Bulgaria, Greece, Portugal and Hungary (Figure 28). A full alignment with the citizens' preferences can be noted only for Bulgaria and Greece, though, i.e. the two countries where the social media was the second preferred source of information. In Portugal where the second source was the written press, priority was set on the social media instead; in Hungary where the second main source was OOH, there was no outdoors advertising activity.

Italy, Latvia and Poland were the main outliers setting priority on the written press rather than the digital media.

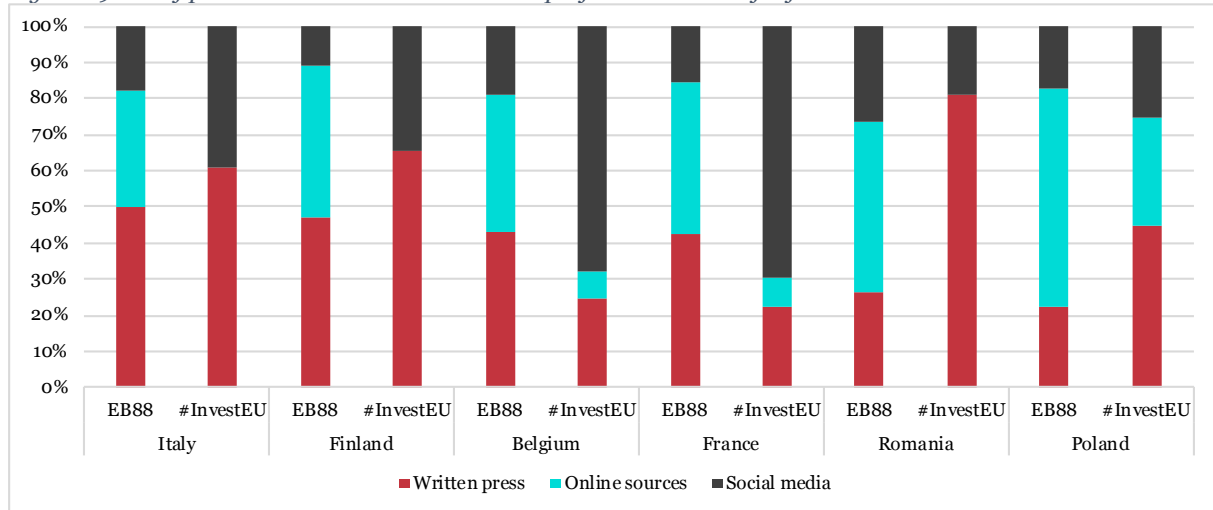
Figure 28 Paid media outputs in countries with written press as main source of information



Source: WPP Key performance metrics, June 2018 (share of total outputs)

These findings are confirmed especially in the case of Italy, Finland, Belgium and France when comparing the priorities set in the national campaigns with the Eurobarometer data on preferred sources for information on EU matters. While there was a good alignment of the use in the channels with the citizen’s preferences for 10 out of the 16 national campaigns, Figure 29 shows that in the case of these four countries, the use of the online media was at a minimal level compared to its importance for the citizens. In the case of Romania and Poland, which are two countries where the digital media were key sources of information on EU matters, there was an over-emphasis on the use of the written press, instead.

Figure 29 Use of paid channels versus EB data on preferred sources of information on EU matters



Sources: WPP Key performance metrics, June 2018; Eurobarometer standard survey 88, 2017

4.2 Effectiveness of the campaign

In this section, our evaluation focuses on the following questions:

- “*What was achieved?*” – In Section 4.2.1 we look into the reach of the campaign, the recall and engagement obtained, as well as the effects on changes in perception
- “*To what extent were the set objectives of the communication activities achieved?*” – we set the data reported in the previous section against the objectives established for the campaign (Section 4.2.2)
- “*What factors influenced the achievements observed?*” – we explore the explanations for where the campaign has met, or not, its targets (Section 4.2.3). We focus on assessing a number of assumptions that were made in the intervention logic underlying the campaign strategy and design, including the influence of paid media spending and the campaign content, the effective involvement of internal and external stakeholders, and the potential influence of external factors

4.2.1 Achievements of the campaign

Effectiveness relates to the individual country strategy, its implementation, and the effects in the various countries, and also at EU-level. We based our assessment on a number of quantitative and qualitative sources. Sources of quantified data include the data on Key Performance Indicators (KPIs) collected by WPP during the campaign, additional data collected by the evaluation team (e.g. website and social media data from owned and earned channels), baseline, interim and final polling by Kantar Public, baseline and interim polling by Ipsos Mori, pre-test focus groups carried out by Kantar Public, and post-test focus groups carried out by Ipsos Mori.

4.2.1.1 Reach of the campaign

By the end of May 2018, WPP estimated the *aggregate campaign reach at 400 million people*²¹.

- In terms of aggregated contacts, the *paid campaign reach* is highest in the countries with the largest populations: France, Italy, Germany, Poland and Spain.
- The *earned reach* shows some significant differences: the larger member states – Italy, Poland and Spain show the highest reach, but Germany and France perform much lower.

Deduplicated reach

Using our deduplication methodology (see Annex 1 for details – separate report) to arrive at a more realistic measure of the potential number of people of the target audience reached by the campaign,²² we estimate that almost **240 million people have been potentially reached** by the campaign, via paid, owned and/or earned channels.²³

It is important to emphasise that, while we have deduplicated the contacts generated in each channel and country, this is still a measure of **potential reach**. An ad appearing in a print newspaper can be said to have reached anyone who buys the newspaper (i.e. the circulation figures) but it is not necessarily seen by all those people. Thus, even *deduplicated* potential reach is only **a measure of exposure to the campaign**, not how many people have really noticed and consumed the content.

²¹ Estimated by WPP: “Potential number of people of the target audience reached by the campaign” based on the sum of “contacts” (an estimate of potential reach per campaign output calculated to be more realistic than total Opportunities to See but still using OTS as a basis for the figure) per country.

²² This methodology attempts to take account of the likelihood that an individual is “reached” more than once, via multiple media or channels, and at different times during the campaign. It takes account of the probability that a single individual was exposed to the campaign several times, e.g. via a tweet in June, a poster in November and an article in January – and counts them only once, not 3 times.

²³ This estimate is deduplicated in terms of the total reach of the different media channels and the zoom-in countries’ total populations. It is very difficult to estimate what proportion lies within the target audience age range, due to insufficient data, but deduplicating the reach of the different channels against the population aged between 15 and 64 suggests that around 90% of the reach is within this group.

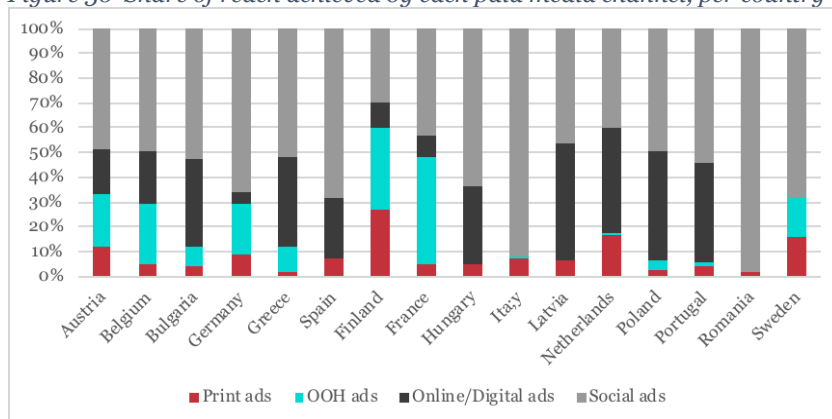
When considering the channels separately, **paid channels result being the most significant in generating reach**: 200 million citizens were potentially reached through paid advertising, i.e. via OOH, print, digital (web) and social media advertising, while in total 88 million citizens were potentially reached by the campaign’s PR activities in **earned channels** (print, online, radio and TV). These additional 88 million people potentially reached through earned channels leads to *only a 40 million increase in total decumulated reach*, since the calculation quantifies the probability that more than half of those people exposed via earned channels would also be exposed via paid channels – they are therefore not counted twice.

Owned channels include the campaign website, the corporate DG COMM social media accounts and the REPs’ and EDICs’ activities. Unfortunately, for the owned channels with the greatest reach (e.g. REPs’ social media accounts) we do not have access to the reach/impressions data. For the other owned channels (e.g. the website and REP-organised events) the reach figures are relatively small in comparison to the paid and earned channels, and likely to be mostly duplications of people already reached via paid/earned channels (since website visitors and event participants are likely to have heard about the website/event via other channels), and so are not likely to affect the overall reach figures significantly.

Paid reach

While reach achieved through paid advertising channels was the major contributor to the total reach of the campaign, it is also clear that **social media advertising** was the major contributor to paid reach. The share of aggregate paid reach achieved by social media exceeded 50% in 12 out of the 16 zoom-in countries. Only in four was it less than half the total paid reach: Finland (where print and OOH ads achieved a large share of the reach), France (where OOH ads accounted for a large proportion), Latvia (where digital ads were relatively successful) and the Netherlands (where digital and print, together accounted for 60% of the paid reach achieved). In this, #InvestEU performed approximately according to the campaign strategy – achieving reach mainly through the paid social advertising channel.

Figure 30 Share of reach achieved by each paid media channel, per country



Source: Technopolis analysis, based on WPP KPI data May 2018

Earned reach

It is worth stating the significant contribution of the earned channels for a number of countries: in Spain, Italy and Poland, they accounted for 12-14 million contacts while for all other countries this channel ranged between 1 and 7 million contacts.

Cumulative effect of campaign over time

Since the deduplication calculation takes into account the probability of an individual being exposed to the campaign more than once, the number of people potentially reached tends to plateau for each

channel and for each country as the campaign progresses. Each new exposure of the campaign has a growing likelihood of reaching someone who has already been exposed to the campaign.

The total potential reach of the campaign received a boost in September, as various paid social media and digital advertising campaigns kicked off, and again in February, with the addition of InvestEU campaigns in two new countries (Romania and Sweden), but after each of these initial boosts the rate of increase tends to decline.

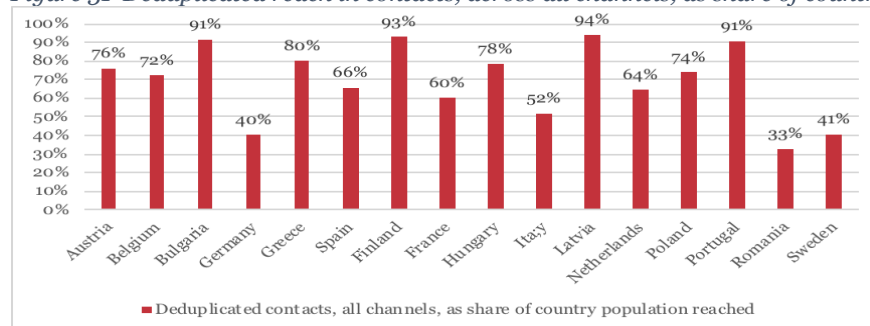
In fact, looking at each month individually, the potential reach generated in October and March was even higher than that generated in September and February, but the difference they made to the total decumulated potential reach is smaller, since *for each new wave of advertising in any specific channel there is a growing probability it is reaching individuals who have already been reached by previous waves, and a growing (though smaller) probability that it is reaching individuals who have already been reached by other channels.*

It is not a problem in itself, since multiple exposures to the campaign can contribute to greater recall and awareness/perception change, but simply something that should be taken into account in terms of reach measurement and targets. This issue is treated in more detail in Section 4.6 on Sustainability.

Share of the countries' populations reached

When judging the **results of the campaign**, however, the important measure is the **share of the country's population** potentially reached by the campaign. *Only when a significant share of the country's population has been reached one can expect to see any changes in awareness or perception (or indeed recall of campaign elements) in a nationwide polling sample (see Figure 31, below).*

Figure 31 Deduplicated reach in contacts, across all channels, as share of country's population



Source: Technopolis analysis, based on WPP KPI data May 2018

In most countries, the campaign can be said to have *potentially* reached a target audience equivalent to over 50% of the population. The exceptions are Germany, Romania and Sweden, where it is lower where it is lower: in Romania and Sweden, because they joined the campaign as zoom-in countries much later than the other 14, and in Germany, probably due to a regionally-focused campaign and a very large overall population. In a few countries, potential reach is equivalent to an exceptionally high proportion of the population, namely Latvia, Finland, Bulgaria and Portugal (over 90%). In most cases, these represent relatively small populations where reaching a large share is easier. Whereas the larger countries – France, Italy and Spain – are at the lower end of the scale.

This does not necessarily mean that most of the population has consciously seen the campaign materials – an ad in a newspaper or a poster in a railway station are easily missed – only that the exposure of the campaign means that it potentially *could have been* seen by half the population via one of the campaign channels. In this calculation we are also dependent on WPP reporting of “contacts”, which is ultimately an estimate of opportunities to see. The only way to verify how many people have seen the campaign is by asking in a representative survey, but this measure is called **Recall** as it can only detect those who have not only seen the campaign but also remember it (see Section 4.2.1.2).

Detailed breakdowns of reach-per-country over time and evolution-by-channel over time are included in Annex 1 to this Final Report (separate report).

4.2.1.2 Recall

To verify how many people have seen the campaign, and remember seeing it, we have analysed the results of three waves of polling carried out by Kantar Public (baseline, interim and final) in the original 14 zoom-in countries, and two waves of polling by Ipsos Mori (baseline and final) in 15 zoom-in countries: the original 14 plus Sweden (no baseline, final only)²⁴.

In treating this data, we have used a weighted average of the results in the different countries – taking into account their populations. A simple average would distort the results since low recall in a small country could cancel out the effect of high recall in a much larger country.

Spontaneous general versus specific recall

The Kantar Public polls indicate that **around half of all respondents have seen, heard or read adverts, publicity or other types of information in the last couple of months that focused on the EU**. This ‘spontaneous general recall’ figure has shown a small decline from the baseline (52%) to the final (47%) surveys. However, there was a great variability across countries: under 40% of people in France (31%), Germany (35%), Belgium (38%) and Finland (39%) have read, seen or heard about EU-related ads; while in Bulgaria (67%), Greece (66%), and Spain (63%), more than 60% of people had. While it is unlikely to show any effect of the campaign, this result confirms that the campaign is taking place in a context of high visibility of the EU.

Another question in the Kantar survey is ‘spontaneous specific recall’: people were asked, “Have you seen any adverts, publicity or other types of information in the last couple of months which focused on investment or funding activities supported by the EU in your country?” A weighted average of **35% say they have seen, heard or read this kind of material**, i.e. the equivalent of 130 million citizens.

Respondents in Hungary, Bulgaria and Greece are the most likely to have seen, heard or read such ads, publicity or information (over 60%), while those in France, Germany and the Netherlands are the least likely (around 20-25%). The Kantar polling was confirmed by the Ipsos Mori polling, where **34% of respondents were able to recall seeing/hearing about EU investments in their country**.

Spontaneous specific recall does not necessarily measure the effect of the campaign, since respondents may be recalling a different campaign on EU investments (or simply mistaken about the topics of the ads they remembered). It is therefore quite a different measure from the prompted specific recall – i.e. recall of specific ads from the campaign when shown them – which is treated later in this section.

Correlation between reach and recall

We have performed a statistical analysis to see if this spontaneous specific recall can be associated to the campaign. The Ipsos Mori poll asked the same question in its baseline and final polls: “During the past six months, have you seen, heard or read anything about investments in companies and projects in [COUNTRY] that have been supported by European Union (EU) funding?”

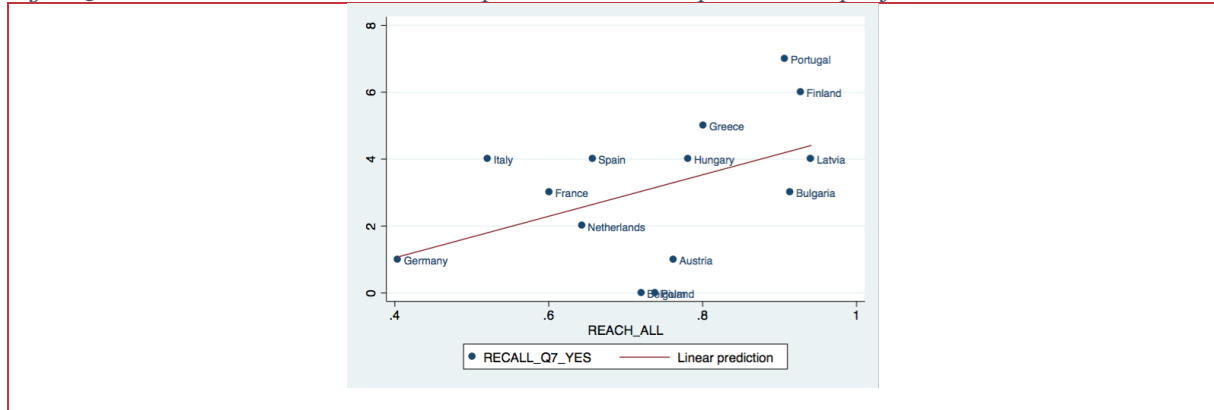
The scatter plot below shows a **positive relationship** between the growth in spontaneous specific recall recorded by the Ipsos Mori polling and the overall deduplicated reach figure as a share of the country population. To validate the results from the scatter plot, we ran a regression analysis which

²⁴ Romania and Sweden were not-zoom-in countries at the beginning of the campaign. For this reason, they were not included within the scope of the monthly monitoring or the polling carried out by Kantar Public and Ipsos Mori. They have been included within the scope of this evaluation however, using the data available at the end of the campaign. As a special case, Sweden was covered in the final post-campaign polls carried out by Ipsos Mori, providing data on recall, for example, although the lack of a baseline poll makes some results more difficult to interpret than in other countries. Romania was not covered by any polling and so no recall/perception data is available for this country.

confirmed the statistically significant positive correlation between these measures of reach and recall (Figure 32).

Details on the various regression analyses conducted as part of this study, including statistical significance, are included in the Methodological Report (Annex 1 to this Final Report, separate report).

Figure 32 Correlation between overall deduplicated reach and spontaneous specific recall



Source: Technopolis analysis, based on Ipsos Mori data June 2018

Recall of slogan

Kantar Public’s final poll found that around one fifth of respondents recalled hearing one of the #InvestEU campaign slogans (e.g. “Opportunities start here” or “Innovation starts here”). This is validated by the Ipsos Mori poll, which found that around one quarter of respondents were either sure or thought they recalled it ²⁵.

In both polls, Bulgaria, Portugal and Hungary are among the top five countries in terms of slogan recall (between 20-35% recall) while Belgium and Finland (~12%) are the lowest. Differences at country-level on the use of the slogans and their translations can partly explain some results. For example, the slogan “Opportunities starts here” was only used in one of the four flagship project campaigns in Germany. This may account for poor recall in the Ipsos Mori poll where 55% indicate that they had definitely not seen the slogan. From the post-test focus groups, the French groups tended to react negatively, noting that “Opportunities starts here” is difficult to translate into French – this also may account for a low recall in the Ipsos Mori survey.

Kantar’s poll suggests around 80 million people recall one of the #InvestEU campaign slogans, while Ipsos Mori polling suggests that **16 million people (4%) definitely recall the #InvestEU campaign slogan after its fourth advertising wave, while 80-100 million (20-25%) probably recall it.**

In addition, from the Ipsos Mori polling, **over half of those who recalled seeing campaign materials also recall the slogan “Opportunities start here”.** Of those who did not remember seeing the campaign, their recall of the slogan was only 17%. This is evidence that those who think they remember the slogan remember it from the campaign and that most of the campaign recall is real and not misremembered. By socio-demographics, those aged under 35 are more likely than older members of the public to recall seeing/hearing the slogan, and the higher educated more likely than the lower.

The poll also confirms **a correlation between recall of the slogan and higher awareness of EU investment and a more positive perception of the EU:** of those who remember the slogan 32%

²⁵ Polls were carried out on samples of 1000 respondents per country, aged 18 and over, and weighted to each country’s population profile by age, gender and region. As such, they should capture country-wide trends but may be less accurate on region-specific changes.

feel positive about the EU and only 14% feel negative, while 38% of those who recall the slogan are more aware of EU investment and only 15% are not. It's not clear from this result alone whether the campaign has caused more positive awareness or whether being more positive and aware leads one to notice and remember the campaign – but it is one line of evidence supporting a link between campaign recall and awareness/perception change.

Prompted recall of specific ads

Kantar Public's final poll found 29% of respondents remembered at least one of the ads or a similar ad they were shown as part of the survey. In the Ipsos Mori poll, 26% say they have seen the ad or a similar ad (around 10% said they *definitely* recalled seeing the specific ad). The difference between the Kantar and Ipsos Mori polls may be explained by the different methodologies – where Kantar's polling adapted the ads shown at the regional level, Ipsos Mori tested the same ads across the national level. There was therefore a higher likelihood that Kantar respondents would have seen the ads tested.

Another explanation is that the Ipsos Mori poll was held two months later than the Kantar, so recall may have faded.

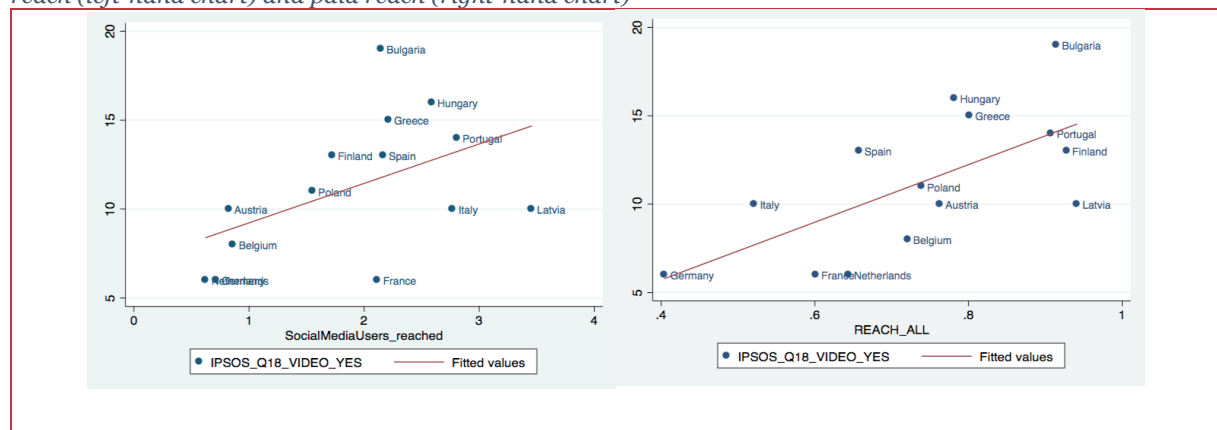
By country, the public in **Bulgaria, Greece and Hungary are most likely to recall seeing the social media ad. Recall is lowest in France, Germany and the Netherlands.** The campaign appears to be most successful in Bulgaria, according to the Ipsos Mori survey, with over half of the public claiming to have seen the ad or a similar ad in the last few months. Of those who have seen the ad, the majority say they saw it on the TV or the internet. Those who remember seeing the social media ad on social media are more likely to be aged under 35 years old.

As a benchmark, based on visually prompted recall, 61% of those polled in Latvia said they'd seen the Pilot campaign's TV ads, dropping to just 6% in Germany, with Spain, Poland, Portugal and Finland ranging from 26% to 43%.

Our statistical analysis showed a **high positive and significant correlation between the aggregate Social Media Users Reached (as percentage of target audience) and Recall of Video (Q18a: "Do you recall seeing this video?")** from the Ipsos Mori poll (see the left-hand scatter plot in Figure 33). This is evidence confirming that the recall recorded by the polling is indeed related to the campaign, and that an increase in the potential reach of the campaign in any specific country – especially when it comes to the paid social media advertising – can indeed be expected to lead to a significant increase in campaign recall.

In addition, **recall of the social media video is correlated with total paid reach** – see the right-hand scatter plot in Figure 33 – but this is probably due to the major contribution of social media reach to total deduplicated paid reach.

Figure 33 The correlation between prompted recall of the social media ads with the campaigns paid social ad reach (left-hand chart) and paid reach (right-hand chart)



Source: Technopolis analysis, based on Ipsos Mori polling data June 2018

Recall/awareness of specific projects

The Ipsos Mori final poll also asked respondents if they had heard of any of the flagship projects in their country. Bulgaria showed the highest awareness of these projects, just as it also showed highest recall of the flagship project-related ads. Austria, Belgium and the Netherlands are all in the bottom five in terms of project awareness, just as they were for project-related ad recall.

This indicates a link between recall and project awareness – and therefore **links flagship project awareness to the effects of the campaign**.

Increases in project awareness are more difficult to interpret, however: several of the flagship projects had not been selected at the time of the baseline poll and therefore were not included. In the final poll they were included and therefore the share of respondents indicating that they have heard about at least one of them increased significantly

4.2.1.3 Engagement

Answering the question to what extent did the target audience engage with the content as expected as well as which tools generated most engagement and where did this engagement take place, we relied mainly on the polling information. Both the Kantar polling and the Ipsos Mori polls asked about the likelihood of citizens to engage with the campaign. ‘Reading the text’ is very likely with 27% of respondents, while only 15% are very likely trying to find out more about the EU investments or talk about it to others (Kantar poll). Similar results were confirmed with the Ipsos Mori polling with 28%, 14% and 16%. By country, there were however larger differences, also between interim and final survey respondents. Yet, **a clear pattern cannot be discerned**.

A few insights are still worth mentioning:

- Personal interest and personal relationships matter: More than 40% of the respondents were motivated to engage with social media posts since “it mentions a cause or topic I care about”, while 17% engaged because it was shared by a friend or relative
- According to socio-demographic analysis there are no large differences in levels of engagement based on gender or age
- Education matters: the longer a respondent remained in education, the more likely he or she is to take action
- Respondents living in cities are more likely to try to find more information or talk about it than people living in rural areas
- Respondents with a positive attitude towards the EU are more likely to say they would take each of these actions, compared to those who are ambivalent

Relationship of Recall to Engagement

In addition to the correlations found between Reach and Recall, our statistical analysis showed a **positive correlation between the Engagement of social media users with social media campaign ads and the Recall of the social media video ads** found by the Kantar poll. Engagement in this case refers to the number of times a social media post/ad was clicked, “liked/reacted”, shared/retweeted, or replied/commented on.

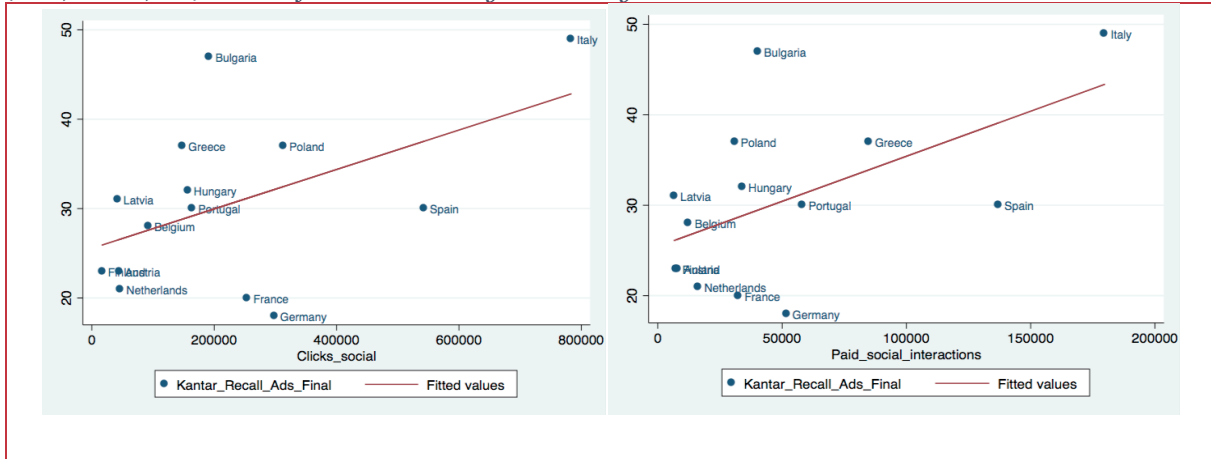
We conducted two regression analyses against the question from the Kantar poll (“Have you seen any of these ads/ videos in the last couple of months?”) (Figure 34): the first used the number of interactions (likes, shares, etc.) with social media ads (shown in the scatter chart on the right below); and the second used the number of click-throughs on social media ads (shown in the scatter chart on the left).

While there are clearly outliers, such as Spain and Bulgaria, the analysis does find a correlation of Recall with both measures of campaign Engagement. And the Ipsos Mori polling goes some way to confirming this by finding two similar correlations – against both interactions and click-throughs – with polling

respondents who answered that they recalled the video ad and those who had seen it on social media (Q19a, “Where did you see this ad?”, referring to the video ad; Answer, “On social media”).

This is evidence that increased engagement with social media advertising – in the form of clicking on the ad, “liking” it, or sharing/retweeting it – will indeed translate into greater recall of the campaign.

Figure 34 Scatter plots showing correlations between recall and engagement on paid social media: interactions (likes, shares, etc.) on the left and click-throughs on the right



Source: Technopolis analysis, based on Kantar polling data March 2018

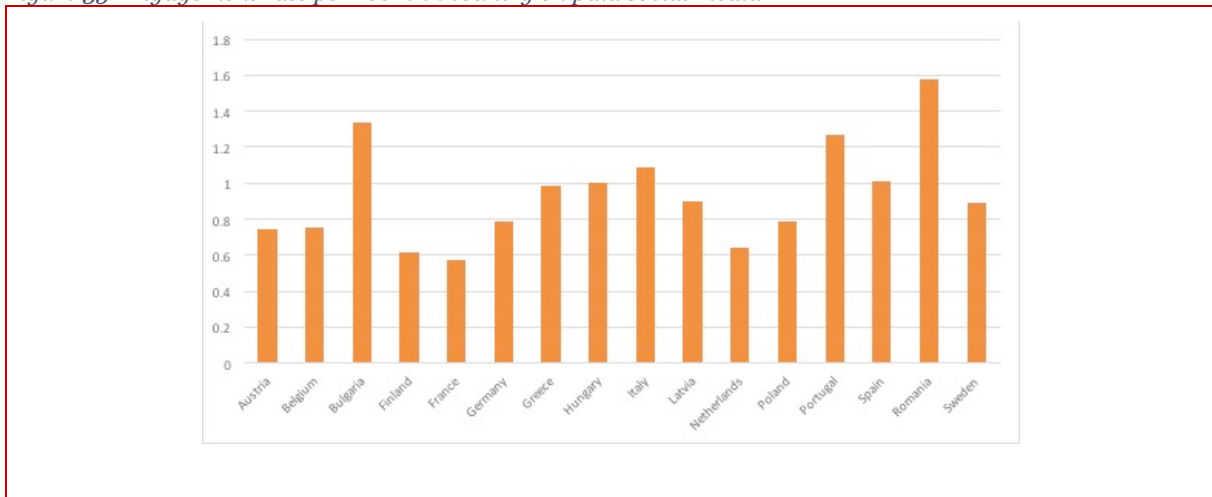
Engagement rates

In order to assess which campaign elements/materials were the most effective in provoking such engagements, we cannot simply look at how many engagements there were. We must take account of the fact that different ads had different reach. We therefore use **engagement rate**.

Engagement rate is the percentage of people who, having seen a social media post/ad, engaged with it (i.e. clicked, “liked/reacted”, shared/retweeted, or replied/commented). It is therefore a measure of how engaging the content is and how engaged the audience. Different social media platforms calculate it in different ways, Facebook measures it relative to their “reach” estimate whereas Twitter measures it relative to impressions, and some call it “interaction rate” (which sometimes excludes link clicks). For the purpose of this evaluation, it is calculated across all campaigns/platforms as the percentage of total engagements (link clicks + “liked/reacted” + shared/retweeted + replied/commented) out of total impressions for a post.

Figure 35 shows the differences in engagement rate per country. Social media audiences were the most engaged in Romania, Bulgaria, Portugal and Italy, and were the least engaged in France, Finland and the Netherlands.

Figure 35 Engagement rate per zoom-in country on paid social media



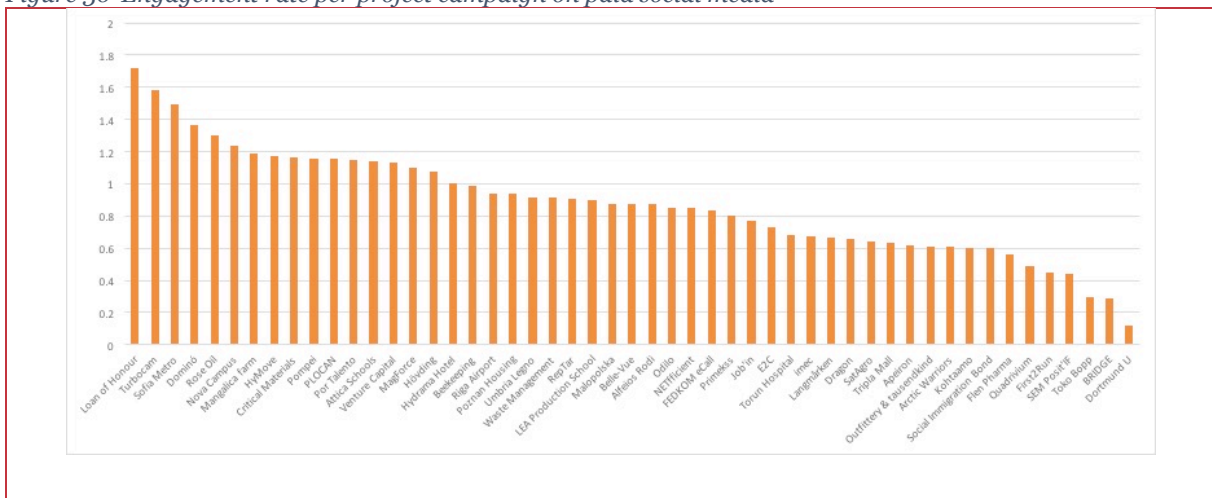
Source: Technopolis analysis, based on WPP monitoring data June 2018

The top 5 individual social media ads in terms of engagement rate were: the Loan of Honour (Facebook, Italy), the Sofia Metro ad (both Twitter and Facebook, Bulgaria), HyMove (Facebook, Netherlands), and Turbocam (Facebook, Romania). In general, Facebook ads had a greater engagement rate than other platforms, making up 18 of the top 20 ads in terms of engagement; Instagram tended to see lower levels of engagement, comprising 13 of the lowest 20 engagement rated ads. The bottom 5 social media ads in terms of engagement rate were: Dortmund U (Facebook, Germany), the Beekeeping (Twitter, Latvia), Job'in (Instagram, Belgium), Bridge (Facebook, Netherlands) and Quadrivium (Instagram, France).

The **reason for different engagement rates for individual ads** involves a complex interaction of factors: country, social media platform and content. The figure below shows the engagement rate per flagship project campaign through paid social media, combining the engagement rates across the three social media platforms. Italy, Bulgaria and Romania all had high engagement rates overall, and they each have a project or projects in the top 5 most engaged with. On the other hand, the HyMove project in the Netherlands performed well, despite the engagement rate being lower in the Netherlands overall.

Two Bulgarian projects – Sofia Metro and the Rose Oil project – are in the top 5. Evidence from the focus groups indicates that factors driving this engagement could be the high national profile of the metro project, and the identification with small-scale producers in the case of rose oil. In both cases, a desire to know more information could be a factor.

Figure 36 Engagement rate per project campaign on paid social media

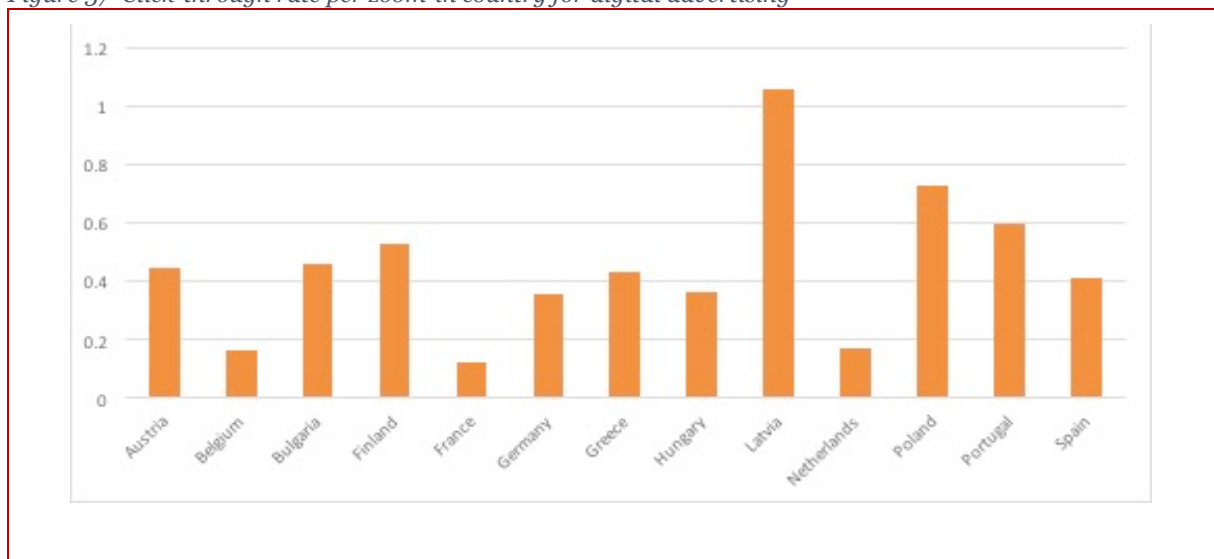


Source: Technopolis analysis, based on WPP monitoring data June 2018

For other channels, audience engagement is less easy to measure directly; e.g. for print and OOH, it can only be measured indirectly through surveys. For digital/web advertising, however, the number of link clicks on an ad relative to the number of times it was seen (impressions) does give a measure of how engaged the audience members were by each ad.

Figure 37 shows the **click-through rate** for digital ads per country. The pattern is quite different from the social media ads, but there are some commonalities: Portugal is among the most engaged countries in both cases, and France and the Netherlands are among the least engaged.

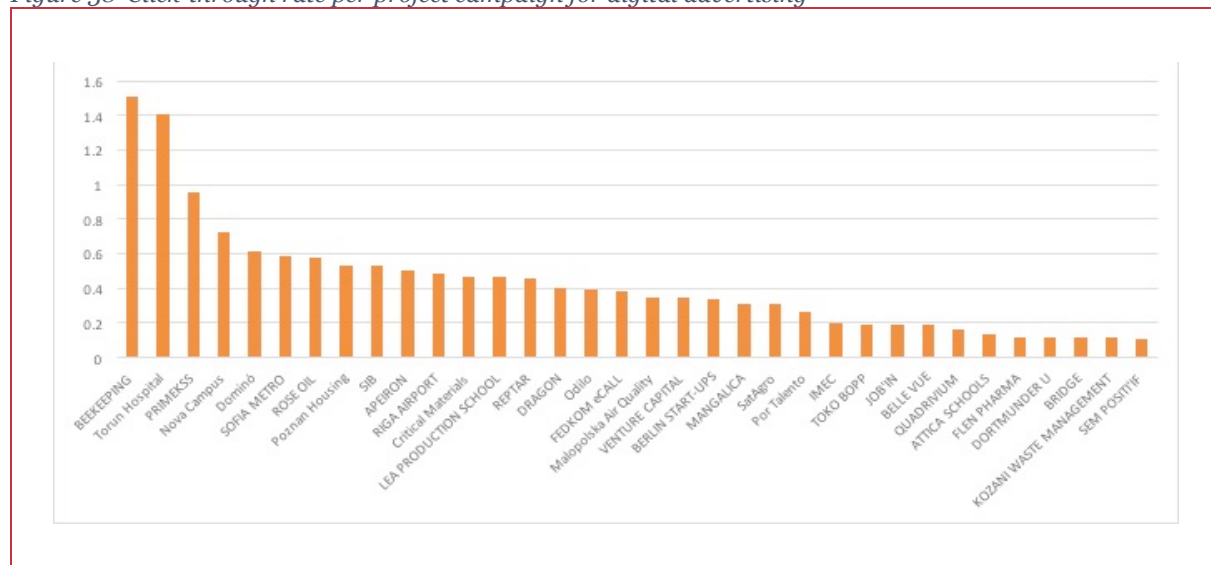
Figure 37 Click-through rate per zoom-in country for digital advertising



Source: Technopolis analysis, based on WPP monitoring data June 2018

Evidence from the focus groups found that French audiences could react negatively to the ads on Sem'Positif and Quadrivium, both of which were among the least engaged with among both social media and digital ads. Belgium also performed badly in digital ad engagement; all four ads were in the bottom 11. Some factors identified in focus groups in both Belgium and France were perceptions about whether highly localised projects in one part of the country (e.g. Brussels or Paris) would feel relevant to audiences in other regions. In both cases, focus groups said the messages were vague and found it hard to see the relevance of small-scale high-tech projects to their lives.

Figure 38 Click-through rate per project campaign for digital advertising



Source: Technopolis analysis, based on WPP monitoring data June 2018

4.2.1.4 Effects on perception change

Did the campaign impact on awareness of the benefits of the EU in their town/region/country and in Europe? According to the final poll of Kantar, the perception had improved compared to the baseline poll on all questions by **an average improvement of three percentage points**.

Since the populations of the zoom-in countries vary greatly, the average change across all 14 countries is not a simple average of the 14 results; a 10% change in Germany makes a bigger difference to the total change across Europe than a 10% change in Greece.²⁶ By weighting the average, according to country populations, the overall average improvement decreased slightly to 2.5%. The highest increase (by 4.6%) can be seen with respect to the statement that ‘the EU helps create economic growth in my region’ while ‘public money should be used to stimulate private sector investment at EU level’ improved only by 1.1%. There are large differences between the countries. The largest change can be found in Greece with 13% while in France (-2.9%), Finland (-1.4%) and Bulgaria (-0.8) the perception changed negatively between baseline and final poll.

Ipsos Mori polling confirmed the changes and the fact that, in particular, small and Eastern European MS agreed widely with the statement that ‘the EU helps to boost investment in projects that benefit’ – even more at country level (EU average of 50%) than at regional level (40%).

We note that nearly all the change occurred in Kantar’s interim polling but very little change can be found between interim and final poll. Negative perceptions dropped off to a larger extent. Thus, the impact of the campaign can mainly be associated to the first waves, while **very little additional effect can be seen from continued campaigning**.

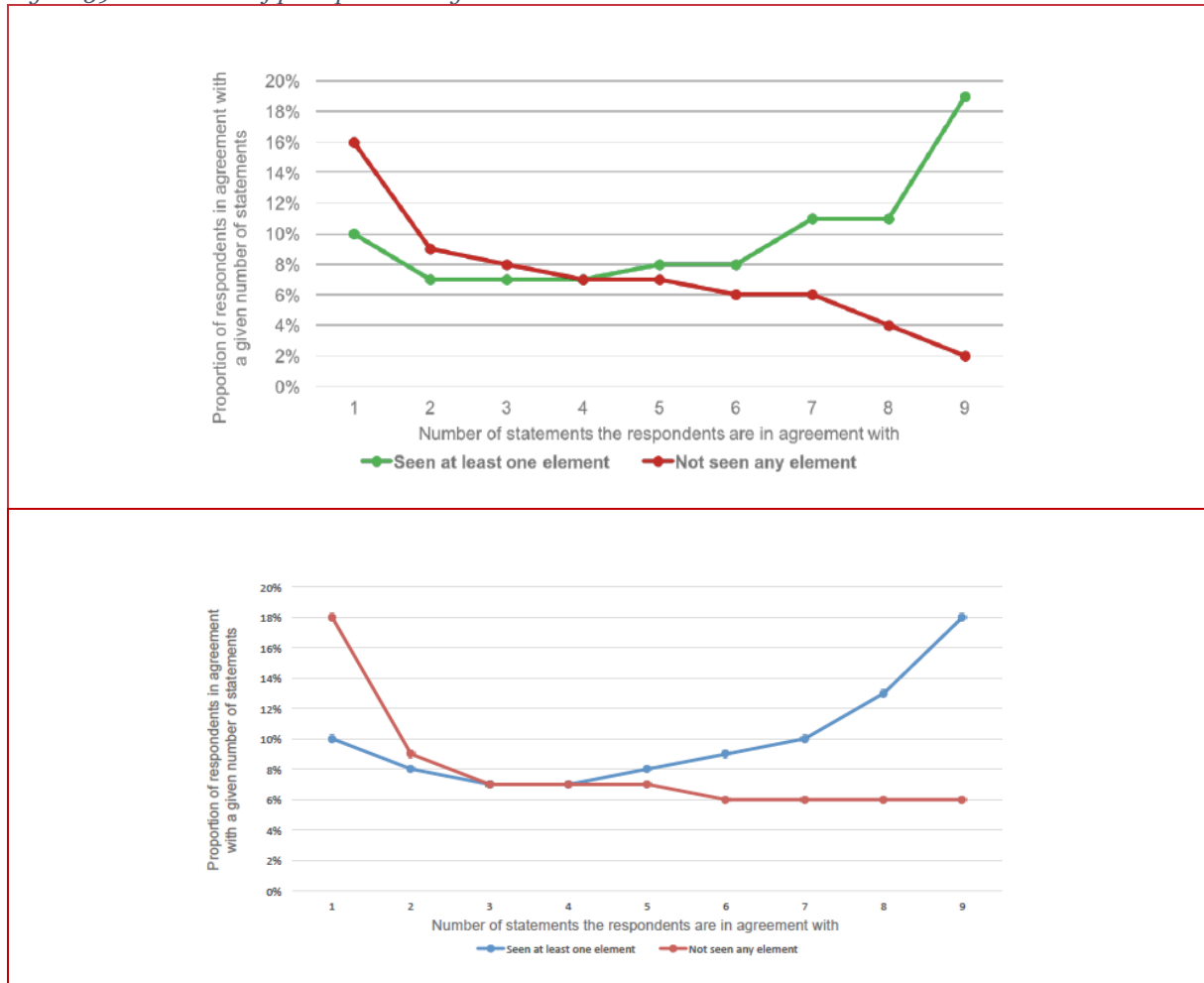
This may also be related to the ‘plateau’ effect of duplicated reach described in Section 4.2.1.1. A significant proportion of the reach achieved between the interim poll and the final poll was duplicated reach towards the same individuals who had already been reached between the baseline polls and the interim. Hence the impact in terms of recall/awareness was smaller during this second period.

²⁶ Romania and Sweden were not zoom-in countries at the beginning of the campaign and so were not included in the Kantar Public and Ipsos Mori polling. As a special case, Sweden was added in the final post-campaign polls carried out by Ipsos Mori (but without a baseline poll). Romania was not covered by any polling. For this reason, while there were 16 zoom-in countries by the end of the campaign, for recall measures we only have data from 15 zoom-in countries (excluding Romania), and for awareness/perception change we only have data from 14 (excluding Sweden and Romania).

Correlation of recall and perception change

From Kantar Public’s final poll, respondents who recall seeing at least one element of the campaign are much more likely to agree with six or more of the statements about the benefits of EU investment than those who do not recall any campaign element.

Figure 39 Correlation of perception change and recall



Source: Kantar Polling data October-November 2017 and March-April 2018

This indicates **a link between seeing the campaign (and recalling it) and more positive perception of EU investment** in various forms. While correlation does not necessarily imply causation – it is possible the correlation stems from a predisposition among people who already feel more positive towards the EU to pay attention (and hence recall) to campaign elements (especially since it is higher in the interim poll than the final poll) – it is the second relevant correlation between the important campaign results of reach, recall and perception change:

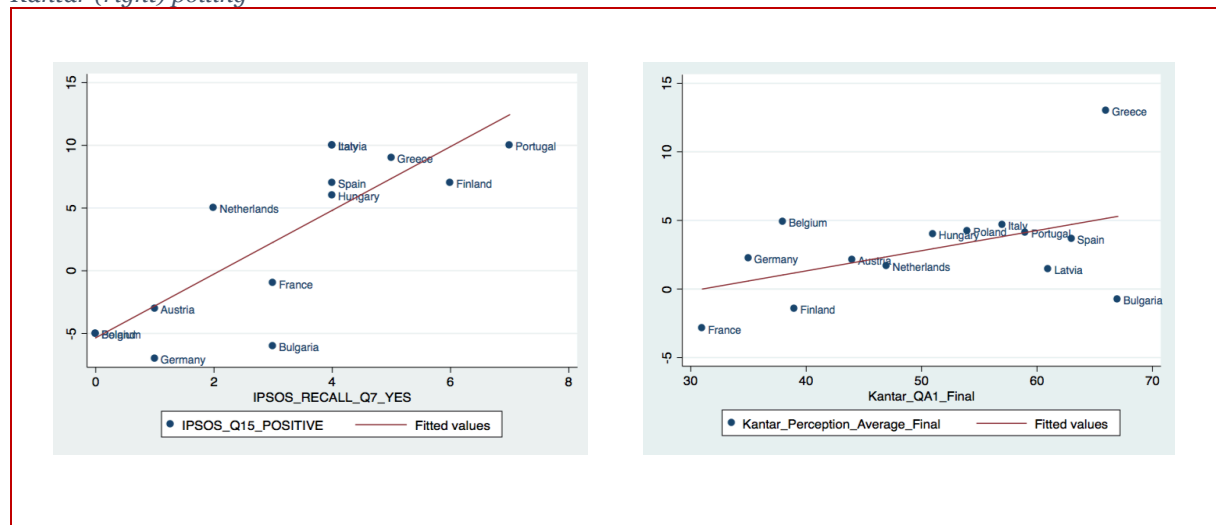
- There is a statistically significant positive correlation between total deduplicated campaign reach (across all channels) and spontaneous specific recall (respondents who remember hearing *something* about EU investment)
- We note a positive correlation between recalling campaign elements and more positive perception of EU investment
- Taken together, while not directly causative, this is a positive indication that the campaign is meeting its objectives

In addition, the polling from Ipsos Mori found that 30% of those who were shown the ads said the campaign materials made their opinion of the EU more positive, with only 3% saying it made them feel more negative. Our statistical analysis also confirms a link between recall of the campaign and a more positive perception:

- When asked if they agree it is important that the EU provides funding to support private sector firms, 77% of those who have seen the campaign agree vs 67% of those who don't recall seeing it
- Equally, when asked how favourable or unfavourable they are towards what the EU is doing to invest in the economy in their country, 80% of those who recall the campaign are favourable vs 64% of those who are not
- Furthermore, specific recall of the social media ads is correlated with both the total reach and the reach of paid social media, indicating a link between campaign reach and both spontaneous and prompted recall
- And, as shown in the previous section, we find a correlation between specific recall of the social media ads and engagement with them (whether like/share interactions or click-throughs). This seems to confirm a causal chain from reach, through engagement to recall and perception change – at least for the paid social media part of the campaign.

Indeed, as seen in Figure 40 our regression analyses confirm the correlation with both sets of polling results. Significantly, the correlation found in the Kantar data is also with spontaneous specific recall, a third line of evidence for the link.

Figure 40 Correlation of spontaneous specific recall and positive perception change in Ipsos Mori (left) and Kantar (right) polling



Source: Technopolis analysis of Ipsos Mori polling, May-June 2018

For benchmarking, no direct comparison is possible. Yet, in the evaluation of the Pilot Corporate Campaign, the percentage of respondents who felt the campaign improved their understanding of what the EU is doing was between 59% and 70% in most countries. In terms of perception change, between 32% and 56% of respondents answered that the ads would make them feel more positive about the EU if they saw them.

4.2.2 Achievement of the set objectives

In this section, we compare the performance of the campaign against the targets set for the campaign by the European Commission.

Both polls found that specific recall of campaign materials was highest in Bulgaria and Italy. Evidence from engagement with social media ads indicates that engagement with the ads based on flagship

projects in those countries was relatively high. And evidence from focus groups suggests that the topics of some of those flagship project ads was indeed found to be relevant and engaging.

Table 6 below compares the campaign performance to the targets set in DG COMM’s Management Plans for 2017 and 2018, for both Reach and Recall.

In terms of Reach, the campaign has largely exceeded its targets. In their KPI reports, WPP reported a total of 160 million paid contacts made by the end of 2017, plus a further 75 million earned contacts – and from our calculations for this evaluation we arrive at a deduplicated total of 170 million contacts made during 2017 (counting both paid and earned). This result far exceeds the 10 million cited by DG COMM in the 2017 Management Plan. The target for 2018 was set at 40 million, and this was also exceeded by the campaign in the first months of 2018 to May: we calculate that a further 70 million deduplicated contacts were added by the campaign during early 2018 (counting paid and earned) in order to arrive at the campaign total of 240 million.

In terms of Recall, the picture is more complicated. Kantar’s polling found that almost 30% of the audience recalled campaign materials (either the specific ads shown or similar ads) both in late-2017 and early-2018, exceeding the Management Plan target of 10% for 2017 and 20% for 2018. However, recall of campaign materials in Germany in March 2018, at 18%, still falls short of the target for 2018. Kantar polling also found that recall of the campaign slogan was only 15% in March 2018.

Ipsos Mori polling was based on a different methodology for recall, testing two sample ads in national polls – rather than targeting specific ads to poll samples in specific regions (likely to boost the overall recall rate) as in the Kantar polls.

The Ipsos Mori final poll, held in May 2018, met the recall target of 10% for 2017, but shows mixed evidence for the 20% target for 2018: only around 10% of respondents recalled the specific ads they were shown – but a further approximately 15% said they had seen similar ads, which may reflect a recall of InvestEU campaign materials in general reaching 25%. The correlation found between overall paid reach in different countries and specific recall of the campaign ads shown indicates that the specific recall of similar ads is likely to indeed reflect other InvestEU campaign ads.

Both polls found that specific recall of campaign materials was highest in Bulgaria and Italy. Evidence from engagement with social media ads indicates that engagement with the ads based on flagship projects in those countries was relatively high. And evidence from focus groups suggests that the topics of some of those flagship project ads was indeed found to be relevant and engaging.

Table 6 DG COMM Management Plan targets for 2017/18 for the InvestEU campaign

| | | Reach (number of contacts made during the campaign) | Recall (% of reached audience able to recall the campaign) |
|------|-----------------|--|--|
| 2017 | DG COMM Targets | 10 million ²⁷ | 10% |
| | Results | In their KPI reports, WPP reported a total of 160 million paid contacts made by the end of 2017, plus a further 75 million earned contacts – giving an aggregate total of 255 million contacts made in 2017. From our calculations for this evaluation we arrive at a deduplicated total of 170 million contacts made during 2017 (counting both paid and earned) | Kantar’s interim poll, conducted in late-2017 found that 15% recalled the campaign slogan, while 28% recalled specific campaign materials (average for all 14 zoom-in countries, weighted for countries’ populations). Results varied greatly among countries, with the worst performers only just reaching the 10% targets: Austria and the Netherlands had the lowest recall of |

²⁷ Aggregate figure of web visits, video views, impressions, etc.

| | | Reach (number of contacts made during the campaign) | Recall (% of reached audience able to recall the campaign) |
|------|-----------------|---|--|
| | | | the campaign slogan (10% and 11% respectively) and campaign materials (11% and 13%) |
| 2018 | DG COMM Targets | 40 million ²⁸ | 20% ²⁹ |
| | Results | <p>WPP reported a total of 400 million aggregate paid contacts by the campaign by the end of May 2018, meaning 240 million paid contacts made in 2018, and 140 million earned contacts, meaning 65 million made in 2018 – giving an aggregate total of 300 million contacts made in 2018</p> <p>From our calculations for this evaluation we arrive at a total of a further 70 million deduplicated contacts were added by the campaign during early 2018 (counting paid and earned)</p> <p>For the reasons given in Section 4.2.1, a greater number of aggregate contacts generated in 2018 than in 2017 led to a smaller increase in deduplicated contacts because many of the 2018 contacts represent individuals already reached in 2017.</p> | <p>Kantar’s final poll, conducted in March-2018 found that 19% recalled the campaign slogan, while 29% recalled specific campaign materials (average for all 14 zoom-in countries, weighted for countries’ populations).</p> <p>Results varied greatly among countries, with the worst performers not reaching the 20% targets by some measures: Finland and Belgium had the lowest recall of the campaign slogan (11% and 13% respectively), while Germany and France had the lowest recall of campaign materials (18% and 20%)</p> <p>Ipsos Mori’s final poll, conducted for this evaluation, found that around 10% recalled seeing the specific ads tested in the polling, with around a further 15% saying they had seen a similar ad (likely to be another InvestEU ad shown in their country).</p> |

Source: DG Communication, Management Plan 2017, Ref. Ares(2016)7163759 - 23/12/2016; DG Communication, Management Plan 2018, Ref. Ares(2017)6346246 - 22/12/2017

In addition to the targets set by DG COMM in their Management Plans for 2017 and 2018, **KPI benchmarks** for WPP were agreed with DG COMM in June 2017. They were set on the basis of terminology from the AMEC integrated evaluation framework, Kantar and Mindshare projections for paid media, local network projections for earned media, and benchmark analysis of the ‘EU Working for You’ campaign. Table 7 below compares the campaign performance – both as measured by WPP and by the evaluation team – against those benchmarks.

Again, the reach KPI benchmarks have been met or exceeded:

- The benchmark for paid reach was 160 million contacts to have been achieved with campaign advertising material. By May 2018, WPP reported 400 million aggregate contacts to have been achieved by the paid advertising campaign. Our deduplication analysis reduced this to 200 million deduplicated contacts (meaning that half the reported contacts were likely to have been repeat contacts), but by both measures the benchmark target was exceeded.
- The benchmark for earned coverage was 75 million contacts to have been achieved by earned media coverage of the campaign. By May 2018, WPP reported 140 million aggregate contacts to have been achieved through earned coverage. Our deduplication analysis reduced this to 88 million deduplicated contacts (meaning around 40% of the reported contacts were likely to have been repeat contacts), but by both measures the benchmark target was again exceeded.

Recall is again a more complicated picture. Looking at spontaneous specific recall – the percentage of the audience recalling publicity/information focused on EU investment and funding – the benchmark

²⁸ Aggregate figure of channels used in the campaign (website, social media, outdoor advertising, media)

²⁹ The Directorate-General for Communication use at least 20% recall as a benchmark because that was what was measured in the pilot campaign "EU Working for you" – now the benchmark for all three corporate campaigns.

of 30% has been met according to both the Kantar polling and the Ipsos Mori polling – which both found around 35% recalled publicity/information focused on EU investment.

Prompted specific recall – the percentage of the audience who recall seeing a specific ad or slogan when shown it – achieved more mixed results. According to Kantar’s final poll, conducted in March 2018, just 19% recalled the campaign slogan but 29% recalled seeing specific (or similar) campaign ads. These were the averages across all 14 zoom-in countries, weighted for the countries’ populations –and exceeded the target overall. But the results varied greatly among the countries, with the worst performers not reaching the 25% targets: recall of the campaign materials was below the benchmark in Germany (18%), France (20%), the Netherlands (21%), Austria (23%) and Finland (23%).

Meanwhile, Ipsos Mori’s final poll, conducted in May 2018, found that around 10% recalled seeing the specific ads tested in the polling, with around a further 15% saying they had seen a similar ad (likely to be another InvestEU ad shown in their country). The correlation found between overall paid reach in different countries and specific recall of the campaign ads shown (see section 4.2.1.2) indicates that the specific recall of “similar” ads is likely to indeed reflect other InvestEU campaign ads. In addition, around 25% think they recall seeing the campaign signature “opportunities start here”, although only around 5% are certain of this. Overall, therefore, it seems the campaign reached its 25% benchmark but there are some uncertainties in interpreting the results.

In terms of “awareness of positive EU impacts”, the set benchmark KPI was to increase such awareness by 5-8 percentage points. Kantar’s final poll, conducted in March-2018 found a 3% increase in individual awareness of positive EU impacts, whereas Ipsos Mori’s final poll, conducted in May 2018, found a range of result for different measures: from a 1-2 percentage-point drop in those who said they felt favourable towards what the EU is doing to invest in the economy in their country or region, to a 4-5 percentage-point increase in those who agree that the EU helps to create the conditions for more jobs in their country or region. Therefore, this benchmark was not met.

The strategy of reaching target audiences with campaign materials based on EU funded projects, on the assumption this would increase their awareness of such positive EU impacts appears to have been correct, as polling confirms a link between recall of the campaign and a more positive perception. In both Ipsos Mori’s and Kantar’s polling, respondents who recall seeing at least one element of the campaign are much more likely to agree with statements about the benefits of EU investment than those who do not recall any campaign element. So **there is a link between seeing the campaign (and recalling it) and more positive perception of EU investment.**

However, it appears that a recall level of 25-30% for campaign materials is not enough to produce a greater than 5% increase in such positive awareness. To the extent that positive awareness goals were not met, there are at least two possible explanations, either the content or the recall is inadequate:

- The quality of content and messages could be factors. The large gap in engagement rate between the best and the poorest performing ads implies there is scope for significant improvements in the lowest performing ones. From the focus groups, some of the factors highlighted as producing less positively engaged reactions were projects with too technical or local a focus to feel relevant to the audiences. Factors associated with more positive reactions included projects with good human stories or relevance to national or topical issues.
- An alternative could be that the benchmarks for recall and for positive awareness change are not coherent with each other. Ipsos Mori’s polling found that 30% of those who were shown InvestEU ads said the campaign materials made their opinion of the EU more positive, with only 3% saying it made them feel more negative. This is a positive result but it seems not to have been positive enough to produce 5-8% changes in positive awareness. It is possible that a higher level of recall would be necessary to propagate this level of positive change.

Table 7 Targets set for WPP by DG COMM for the InvestEU campaign

| | WPP KPI Benchmarks | Results as measured by WPP campaign team | Results as measured by evaluation team |
|---|--|---|---|
| <p>Paid media:</p> <p>Outputs – Reach:</p> <ul style="list-style-type: none"> • Potential number of people in key target groups reached by the campaign (=opportunity to see - have seen or been in contact with campaign material) | <p>160 million contacts with the campaign across all paid media channels</p> | <p>In the final KPI report of June 2018, WPP reported 400 million paid contacts by the end of May 2018</p> | <p>From our calculations for this evaluation we arrive at a total of 200 million deduplicated paid contacts made by the campaign by May 2018</p> |
| <p>Recall – Number of people who recall the campaign (altogether or by visual or channel) as measured by:</p> <p>General recall:</p> <ul style="list-style-type: none"> • Percentage of recall of publicity/information focused on the EU (among target audience) <p>Specific recall:</p> <ul style="list-style-type: none"> • Percentage of recall of publicity/information focused on EU investment and funding (among target audience) | <p>1 in 3 (30%) respondents recall having seen publicity/information focused on the EU investment and funding</p> | <p>Kantar’s final poll, conducted in March-2018 found that around 35% of respondents recall having seen publicity/information focused on the EU investment and funding</p> | <p>Ipsos Mori’s final poll, conducted for this evaluation in May 2018, found that around 35% recalled seeing/hearing about EU investments in their country recently</p> |
| <p>Campaign recall – Percentage of recall of:</p> <ul style="list-style-type: none"> • campaign signature • specific poster or ad or other type of branded product | <p>1 in 4 (25%) respondents recall having seen an element of the campaign</p> | <p>Kantar’s final poll, conducted in March-2018 found that 19% recalled the campaign slogan, while 29% recalled specific campaign materials (average for all 14 zoom-in countries, weighted for countries’ populations).</p> <p>Results varied greatly among countries, with the worst performers not reaching the 25% targets: Finland and Belgium had the lowest recall of the campaign slogan (11% and 13% respectively), while Germany and France had the lowest recall of campaign materials (18% and 20%)</p> | <p>Ipsos Mori’s final poll, conducted for this evaluation, found that around 10% recalled seeing the specific ads tested in the polling, with around a further 15% saying they had seen a similar ad (likely to be another InvestEU ad shown in their country).</p> <p>In addition, around 25% think they recall seeing the campaign signature “opportunities start here”, although only around 5% are certain of this.</p> |
| <p>Earned coverage</p> | <p>Audience reach / Readership as opportunities to see (revised as contacts):</p> <ul style="list-style-type: none"> • print coverage - circulation • online coverage - monthly unique visits divided by 28 • Radio and TV coverage - listeners or viewers of the programme | <p>In their interim report, WPP reported 114 million earned contacts</p> <p>In the final KPI report of June 2018, WPP reported 140 million earned contacts by the end of May 2018</p> | <p>From our calculations for this evaluation we arrive at a total of 88 million deduplicated earned contacts made by the campaign by May 2018</p> |

| | WPP KPI Benchmarks | Results as measured by WPP campaign team | Results as measured by evaluation team |
|-------------------|--|---|---|
| | Reach of minimum 75 million | | |
| Perception change | 5-8% increase in individual awareness of positive EU impacts | Kantar's final poll, conducted in March-2018 found a 3% increase in individual awareness of positive EU impacts | <p>Ipsos Mori's final poll, conducted for this evaluation in May 2018 found:</p> <ul style="list-style-type: none"> • A 1-2% drop in favourability towards what the EU is doing to invest in the economy • A 3-4% increase in agreement that the EU helps boost investment in projects that benefit their country/region • A 3-4% increase in agreement that the EU helps to create economic growth • A 4-5% increase in agreement that the EU helps to create the conditions for more jobs |

Source: WPP KPI benchmarks and Technopolis Group treatment

4.2.3 Facilitators and barriers

Here we explore the explanations for where the campaign has met, or not, its targets. We focus on assessing a number of **assumptions** that were made in the intervention logic underlying the campaign strategy and design, i.e.

- The extent to which paid media spending influenced reach and recall (including the effective use of microtargeting in the paid social media campaign), (Section 4.2.3.1)
- The extent to which the campaign content influenced awareness and perception change (Section 4.2.3.2)
- The effective involvement of internal and external stakeholders (Sections 4.2.3.3 and 4.2.3.4, respectively), and
- The extent to which external factors impacted the campaign results (Section 4.2.3.5)

4.2.3.1 The influence of paid media spending on reach and recall

As shown by the fact that reach targets were all met, **the campaign strategy to achieve reach through paid advertising was successful**. This was the case especially for the social media advertising. In fact, the targets for total campaign reach were met by the paid advertising campaign alone – even if the earned coverage achieved by the campaign is excluded.

Indeed, the two countries with the highest advertising spend relative to population were Latvia and Finland, also the two with the highest reach relative to population and mirroring – the countries with both the lowest reach and lowest media budget relative to population were Germany and Italy (of the original 14 countries). This indicates that the assumption that increased advertising spend leads to increased reach held true for the InvestEU campaign (see Section 4.2.1.1 for more detailed treatment).

One caveat to bear in mind for the reach figures is that this is still a measure of *potential* reach. An ad appearing in a print newspaper can be said to have reached anyone who buys the newspaper (i.e. the circulation figures) but it is not necessarily *seen* by all those people. Thus, it does not indicate how much of the population has consciously seen the campaign materials – a poster in a railway station is easily missed – only that the exposure of the campaign means that it potentially *could have been* seen by them

via one of the campaign channels. Therefore, the success in reaching the reach target is to some extent explained by the metric by which it is measured.

The only way to verify how many people have seen the campaign is by asking in a representative survey, but this measure is called Recall as it can only detect those who have not only seen the campaign but also remember it. Nevertheless, the approximate recall measure of 25-30% (by both spontaneous and prompted specific recall) translates into an equivalent of around 100-115 million people. By this measure, the WPP reach benchmarks would not be met (although the DG COMM Management Plan targets would), but this is clearly an underestimate, since it depends on people *remembering* as well as seeing the campaign.

Effective use of microtargeting in the paid social media campaign

An enabling factor identified to reach the target audience and promote the key messages of the #InvestEU campaign, through an effective use of digital and social media channels, lies in the microtargeting strategy developed during the campaign. A sufficient identification of the target audiences was key to engaging citizens with the content of the flagship projects and the message of the campaign.

As mentioned in Section 3.1.3, the targeting strategy in the #InvestEU campaign was based on the learnings of the pilot campaign, additional background research and the outcomes of pre-campaign survey, combined with insights from the Representations, other DGs and focus groups regarding topics of interest in each core country, to tailor the campaign to the national debate.

According to the capabilities of the social media platforms, microtargeting was applied to reaching the segmented target audiences with social media ads based on the selected flagship projects. This strategy **proved overall effective** – substantially contributing to campaign visibility across core countries. It enabled a better targeting and higher reach than traditional paid media campaigns. It also provided engagement with users. In cases where topics addressed in chosen projects were well aligned with users' interest, the engagement rate tended to be higher than originally expected.

However, a number of issues occurred as a result of poor management and communication processes and a learning-by-doing approach to media buying (which sometimes led to inadequate media plans).

The strategy to place an emphasis on social media was meant to provide the greatest possible reach within the budgetary limits. Unlike the pilot project, there was not enough budget to obtain enough reach from e.g. TV advertising in such a large group of countries. To do this, all EC social media channels were to be used, including the EC central accounts and the Representations' accounts. Their audience were to be targeted to generate both organic and paid reach. However, each national campaign primarily used the REPs' accounts to increase local relevance. By extending reach, the campaign organisers aimed to touch new audiences, which explains why only the last phase (consideration) focused on engagement with a qualitative audience and generating traffic to the website.

The results of the campaign show that the **focus on social media has paid off in terms of reach**, especially on Facebook. Social media advertisements reached more people than the other paid media activities. Videos retention rates were overall good, showing that the videos and topics chosen attracted the attention of users. As a result, initial awareness raising seems to have been successful.

However, as mentioned above, it is not clear whether the campaigns managed to secure sufficient recall, awareness or perception change.³⁰ The Dashboards of the social media campaigns do not include recall indicators but point at **issues with frequency of exposure**.

Although the reach target was met, this might have implications on recall, if it is assumed that viewers are less likely to remember something that they have seen over a shorter period of time. The risk of low

³⁰ A more detailed breakdown of the specific channels that matter most for recall of messages (including TV) is included in the Methodological Report (Annex 1 to this final report, separate report)

recall on social media was also highlighted during the interviews with DG COMM, but it is not clear if this question has been addressed by the contractor.

In terms of **engagement**, the results were measured both in terms of interaction indicators (comment, share, reactions) and traffic toward the website (click-throughs). The consideration phase has generated a high level of traffic, above the set benchmarks for click-through rates. This was especially the case on Facebook.

In several instances, the campaigns were stopped earlier than planned during the consideration phase because the frequency rate went higher than expected and the reach was attained after a short period of time. Based on the analysis of twelve projects' dashboards (covering four countries), the decision to stop campaigns earlier did not have a strong impact on engagement on Facebook and Instagram. Apart from one campaign where it led to less link clicks than expected, in most cases, the completion rate does not correlate with the campaign performance regarding traffic to the website. Nonetheless, campaigns that were fully completed tended to have a higher engagement rate (between 0,18% and 0,83%), while campaigns that were halted earlier mostly performed less well (with an engagement rate between 0,16% and 0,5%). This is partly explained by the fact that some campaigns were stopped because the engagement was low, and not the other way around. However, it must be noted that in close to all cases the engagement rate was rather high (from 0,16% to 0,83%).

One problematic issue was that, as a result of changes on the Facebook platform, it was no longer possible to microtarget users based on a number of criteria. The direct consequence was that it was no longer possible to differentiate EU neutrals from Eurosceptics and people with a negative opinion of the EU were no longer excluded from targeting, resulting in a number of negative comments and increased community management needs (which were not adequately foreseen).

4.2.3.2 Quality of content and messages

Ipsos Mori's polling found that 30% of those who were shown InvestEU ads said the campaign materials made their opinion of the EU more positive, with only 3% saying it made them feel more negative. This is a positive result but it seems not to have been positive enough to produce the desired changes in positive awareness.

There is a large range in the level of engagement with different campaign ads in different countries – and there is a correlation between such engagement and recall of the ads across countries. Therefore, improvements in campaign content (choice of flagship projects, quality of materials) would be expected to produce an improvement in engagement and recall – and therefore in improved positive awareness.

The large gap in engagement rate between the best and the poorest performing ads implies there is scope for significant improvements in the lowest performing ones.

The influence of campaign content on awareness and perception change

There is some evidence that the content of campaign materials, and the extent to which the audience found them engaging and convincing was a factor in the non-achievement of the KPI related to “awareness of positive EU impacts” (increase by 5-8 percentage points), although there were some small increases in such awareness overall.

From Kantar Public's final poll, however, respondents who recall seeing at least one element of the campaign are much more likely to agree with statements about the benefits of EU investment than those who do not recall any campaign element. So **there is a link between seeing the campaign (and recalling it) and more positive perception of EU investment.**

Ipsos Mori's polling also confirms a link between recall of the campaign and a more positive perception: overall, those who recall seeing the campaign are more likely to support statements such as “it is important that the EU provides funding to support private sector firms” or to be favourable towards what the EU is doing to invest in the economy in their country. In addition, the polling from Ipsos Mori

found that 30% of those who were shown the ads said the campaign materials made their opinion of the EU more positive, with only 3% saying it made them feel more negative.

Therefore, the assumption appears to have been correct that reaching the target audience with such campaign materials would increase their awareness of positive EU impacts. However, the measured recall of the campaign materials, at 30%, was not enough to produce the target of 5% increase in positive awareness. In other words, achieving the recall target was not sufficient to achieve the awareness/perception change target. Either this target was not chosen correctly or the campaign materials were not sufficiently engaging/convincing to change such awareness/perception, even if they were seen and recalled.

Some of the factors highlighted as producing less positively engaged reactions in focus groups were projects with too technical or local a focus to feel relevant to the audiences. Factors associated with more positive reactions included projects with good human stories or relevance to national or topical issues (see Section 4.1.2, above).

4.2.3.3 Effective involvement of internal stakeholders

The effective involvement and engagement of the various stakeholders of the campaign was seen as a key enabling factor for the effectiveness of the corporate communication actions. The #InvestEU campaign involved numerous stakeholders, both internal and external, whose roles were integrated to an optimal governance scheme to ensure consistency of the message and flexibility in implementation.

To that extent, the campaign design and strategy, with its double governance structure as well as the decentralised and tailored approach, established a rather complicated governance process between stakeholders. To assess this support and level of engagement requires a focus on the involvement of the different groups of stakeholders, their collaboration practices, inputs to the campaign and coordination within the structure and throughout the different phases of design, planning and implementation.

Coordination has been supported alongside the planning and implementation of the campaign, through various activities, from up front engagement of the Representations, Representations' involvement and validation in project selection, exchange and involvement of the central level in the review of the local outreach strategies, and designation of country coordinators within DG COMM responsible for continued exchange with the EC Representations regarding local actions, as well as for final validation of content (managed via GatherContent). Additionally, other more generic fora (e.g. the HoR meetings in Brussels) have been used, as necessary, to address specific campaign related issues during implementation. An overview of the main coordination mechanisms are listed in Table 8, below.

The use of GatherContent in the latter part of campaign implementation (September 2017) appears to have facilitated coordination and oversight of actions and content, especially from the central level, addressing some of the key issues with validation in the first part of the campaign.

Table 8 Coordination mechanisms

| | Coordination mechanisms – between local and central, and locally |
|---|--|
| Ex-ante coordination (before campaign launch) | <ul style="list-style-type: none"> • Inception day – DG COMM, EC Representations, and WPP • Consultation of Representation: gathering of political insight • Representations review and validation of flagship projects (all projects to have Representations support) • Central/DG COMM review of WPP/Representations local outreach strategies – and adaptation of these following reviews |
| Coordination during the implementation | <ul style="list-style-type: none"> • Continued consultation between EC Representations & the country manager within DG COMM, Dir A • Continued collaboration/exchange local WPP & EC Representations • Validation processes – local WPP -> Representations -> DG COMM, country managers in Dir A (supported by GatherContent). |

| | |
|--|---|
| | Coordination mechanisms – between local and central, and locally |
| | <ul style="list-style-type: none"> • Communication on campaign progress to HoR meetings. HoR meetings, as well as head of press/comm meetings with Representations are also used to discuss any outstanding issues – and bilateral discussions may take place in the marge of these meetings |

Source: interviews undertaken in the framework of the assignment

The role of the REPs

The #InvestEU campaign took the innovative approach of a semi-centralised coordination of the campaign, setting the REPs in the ‘driving seats’ of the national campaigns. Evidence collected throughout this evaluation and reported in the different chapters of this report shows that this was a highly effective approach.

The strong involvement and commitment of the REPs was therefore a key enabling factor for the success of the campaign. It was ensured in a first instance by setting the REPs’ interest in participating to the campaign as the core criterion for the identification of the ‘zoom-in’ countries. There was a continued consultation process on the content of the campaigns between the REPs and the DG COMM Dir A, the coordination of which was facilitated by country representatives located within Directorate A.

Overall, the coordination and collaboration between the REPs and DG COMM worked very well. However, from the interviews with the REPs also a certain confusion emerged on the roles of responsibility and accountability between the EC Representations and the European Commission.

Often, the REPs did not voice a narrative of autonomy but rather one of execution, stating that the final decision making on content and strategic approaches was anyhow in the hands of DG COMM. Another often-returning comment was the lack of a precisely defined budget for the national campaign activities limiting the feeling of full ‘ownership’ of the campaign and the REPs’ capacity to take initiative.

The function of the REPs as being “in the driving seat” of the campaign put a considerable strain on them in terms of time and resources which not all the offices were able to handle. Particularly burdensome and lengthier-than-expected was the process for the selection and validation of the projects to showcase in the campaigns. Several interviewees – both at central level and at the level of the Representations - also highlighted that the quality issues with content created a burdensome process for validation. Other interviewees also pointed out that validation processes (irrespectively of quality) at times were slow creating delays in execution.

The other DGs and EU bodies

Another major achievement of the #InvestEU campaign was the good collaboration that was established between DG COMM and various other DGs and EU bodies. Many DGs also used the look and feel of the campaign for many of their own key events (conferences etc).

The #InvestEU campaign had to count from the very beginning on the effective involvement of various DGs and EU bodies such as the EIB, providing input and suggestions on projects to showcase. Their input was expected to be highly qualitative, respecting the criteria defined for the selection of projects.

Table 9 lists the DGs and EU bodies responsible for the funding of the projects showcased. It illustrates especially the important role played by DG REGIO in supporting the identification and selection of projects.

There were some teething problems in the process during the first months of the campaign. A learning that can be drawn from these initial difficulties to receive quality input from the contributing DGs is the need to specify what is required from the DGs when they present their projects in terms of content to facilitate the selection, and the ‘warning’ to the DGs of the time and resources that must be mobilised (especially in the DGs with many projects) so that this process can be optimised.

Table 9 List of projects selected per partner DG

| Partners | Flagship projects | Other showcased projects | Total |
|--------------|-------------------|--------------------------|------------|
| DG REGIO | 14 | 84 | 98 |
| EIB | 24 | 57 | 81 |
| DG EMPL | 5 | 14 | 19 |
| DG RTD | 4 | 8 | 12 |
| DG AGRI | 6 | 4 | 10 |
| DG EAC | 1 | 6 | 7 |
| DG MOVE | | 7 | 7 |
| DG ENV | 1 | 2 | 3 |
| DG CLIMA | | 2 | 2 |
| DG SANTE | 1 | 1 | 2 |
| DG ENERGY | | 1 | 1 |
| EASME | 1 | | 1 |
| Total | 57 | 186 | 243 |

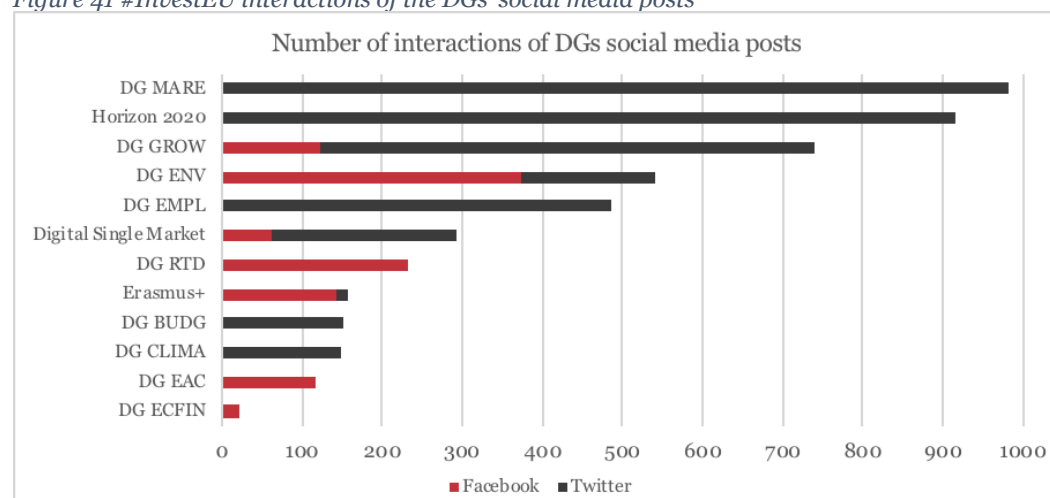
Source: Flagship projects list from DG COMM – treatment Technopolis Group

In addition to their support in the project selection process, the DGs and EU bodies also acted as multipliers and promoted the #InvestEU campaign through their own social media accounts, sharing the message of the campaign with their followers on Facebook and Twitter.

DG GROW had the most active account with more than 35 posts (Facebook and Twitter combined), followed by DG EMPL (22 posts on Twitter) and DG RTD (15 posts on Facebook).

Even though DG MARE and accounts related to H2020 had fewer campaign-related posts (12 and 8 posts, respectively, on Twitter), these posts reached the highest number of interactions (Figure 41).

Figure 41 #InvestEU interactions of the DGs' social media posts



Source: Monitoring of the #InvestEU campaign – Treatment Technopolis Group

4.2.3.4 Effective involvement of external stakeholders

Involvement of the EDICs

As mentioned in Section 3.2.6, above, in total 67 EDICs implemented communication activities in the context of the #InvestEU campaign, in response of a specific call in the autumn of 2016. They started their activities in February 2017, before the kick-off of the national campaigns involving the REPs.

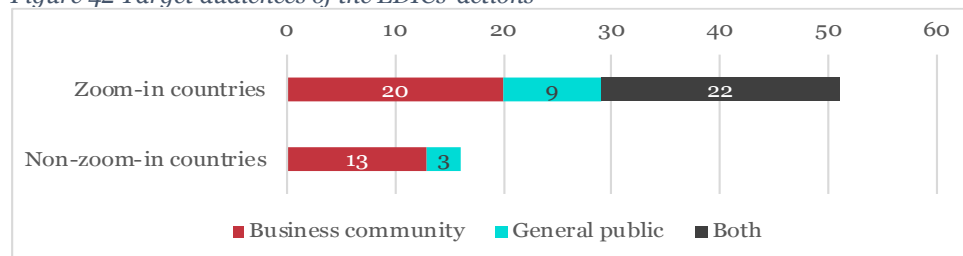
The call defined two main specific objectives for the actions funded:

- Raising awareness and understanding of EU actions promoting jobs, growth and investment
- Stimulating debate on EU actions with citizens at regional and local level and provide feedback to the EC

The timing of both the call and the launch of the EDICs’ activities was an important factor that influenced the focus of these communication activities. Based on the available data and the interviews conducted, in several cases the EDICs regarded the #InvestEU campaign to the citizens as a continuation of the first part of the “information and communication sequence”, targeting the business community (see also Section 3.1.1, above).

In their descriptions of the actions planned, about 40% of the EDICs (28 out of 67) mentioned only the Investment Plan. Especially in the ‘non-zoom-in countries, the focus was predominantly on the business communities, targeted in 13 out of the 16 actions (81%). In the zoom-in countries, the focus was close to equally spread over actions targeting the business community only and those targeting both the business community and the general public. A minority of EDICs targeted the general public only (12 out of 67).

Figure 42 Target audiences of the EDICs’ actions



Source: EDICs final reports

Coordination of the EDICs and the integration of their activities in the national InvestEU campaign was a task that was entirely left over to the initiative of the national REPs. Different approaches are visible in the zoom-in countries.

In countries such as Italy and Spain, a close collaboration was set up between the REPs and the EDICs, leading to an integrated approach and ‘task division’ whereby the activities of the EDICs targeted the more specialised audiences, the business community stakeholders, local institutions and associations. An example was the Tandem Tour (road show) in Italy. Their focus was on explaining the opportunities created, i.e. the funding possibilities.

In these cases, the EDICs were involved **from the early stage of the national campaign**, allowing to fine tune the EDICs actions with corporate campaign in order to speak in one voice and enhance synergies between the local and the national level. Accordingly, EDICs shared their planning in some countries to carefully plan their events without duplication and allowing involvement of other members of the network. These EDICs tried to report the events and the objectives they wanted to achieve and communicate the results, and the REPs integrated the ideas of the EDICs to regionalise and tailor their communication. This early involvement according to the EDICs allowed to implement both a dissemination strategy tailored to the needs of their region and to the InvestEU campaign. It also allowed for a coordination between the different EDICs to implement joint actions.

This early involvement is often praised and expected by the EDICs, who might have missed the “big picture” when not involved early enough. It was the major difference with other national campaign where EDICs would often not even know the local marketing agency. Several EDICs reported that they did not have any or only limited contacts or coordination with their REPs. They worked uniquely on the basis of the call for proposal, the intranet resources (communication tools, webinar, generic emails) for the campaign, and calls and emails to steer their activities.

The **channels used** by the EDICs were predominantly events and the online and social media owned by the EDICs; according to the interviewees, the latter was used especially to inform about the events they organised. However, more than half of the EDICs’ actions in the zoom-in countries (31 out of 51) reached coverage also on television and radio, mainly by building upon their networks and personal contacts. Paid media coverage was limited: only a few EDICs paid for coverage on TV/radio (4 EDICs in the zoom-in countries) and 5 EDICs used OOH (3 EDICs in the non-zoom-in countries, 2 EDICs in the zoom-in countries).

Because of the nature of the target audience, some EDICs chose to use intermediary channels to deliver the message of the campaign. They considered that given the broadness of the audience, the most effective way to communicate was to use information relays indirectly to communicate the message of the campaign. This indirect form of communication passed by institutions (local authorities mainly and business-oriented associations) or knowledge centres (libraries, universities, schools, social centres).

Third party endorsers

Third party endorsement was intended to be a key component of the #InvestEU communication strategy. The function of the third-party endorsement was “*to add more credibility and authenticity to the campaign’s messages by having key opinion leaders promote the key messages of this campaign in public forums and media*”³¹. In the WPP strategy third-party endorsers were described as opinion leaders and key influencers whose opinion matters for the target audience. The third-party endorsements were part of the earned media strategy of the campaign.

The relatively low number of third-party endorsers in the campaign (45 – see Section 3.2.5, above) suggests that the REPs and the local WPP offices overall encountered difficulties in obtaining the buy-in from these actors. This impression was overall confirmed by the interviewees, even though there were some notable exceptions to the rule. An example is Spain where the strong focus in the national campaign strategy on setting up a network led to for example national authorities join forces with the REP as participating partners in the #InvestEU campaign, strengthening the credibility and coherence of the campaign. The campaign reached the involvement of institutional partners such as the European Investment Bank (EIB), relevant Ministries, as well as local Chambers of Commerce who had previously worked with the internal stakeholders on other projects.

While some interviewees questioned the extent to which this element of the campaign strategy could have been effective., from the interviews emerged especially flaws in the **execution of the endorsement strategy**. Issues emerging included a lack of attention in ensuring the endorsers had all needed information and background knowledge and would have some visible benefits from their involvement. Too often, the activities of the third-party endorsers were a one-off, with no follow-up activities to maximize their impact. At the level of the campaign strategy, also a more extensive briefing of the REPs and local WPP offices on possible channels and ways to involve third-party endorsers would have been beneficial.

³¹ Source: Communicating the Investment Plan and other jobs and growth initiatives, The Government and Public Sector Practice and WPP.

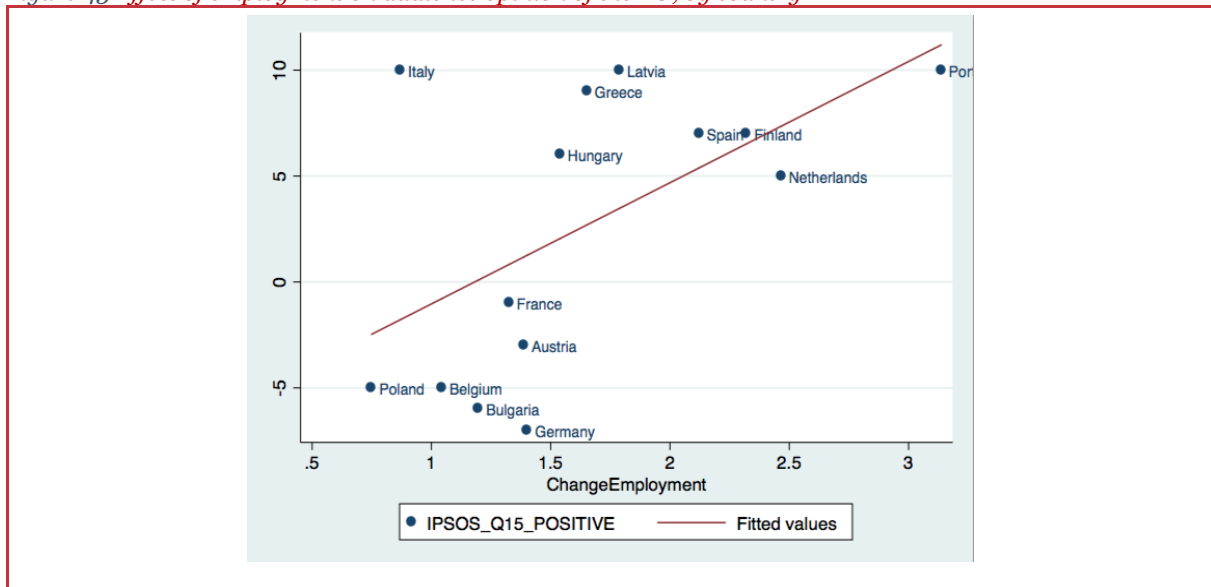
4.2.3.5 External factors impacting public opinion on EU affairs during the campaign period

We can categorise the external factors that could impact the outcomes of the campaign in two major groupings: factors related to the national political context such as elections, major news items (e.g. on corruption scandals related to EU funds), and factors related to the developments of the economic situation.

The **political context** in the zoom-in countries was a key factor that was explicitly taken into account by the REPs in the design phase of the national campaigns. In some countries, the political environment was deemed not favourable to a communication about the benefits of the EU due to Eurosceptic groups or campaigns; in others, elections periods slightly affected the campaign as it was not specifically deemed relevant for REPs to advertise the benefits of the EU during those times, or there was a risk of competing for attention with priority issues in the country.

As for the **influence of economic change**, the data show a positive and significant correlation between the change in perception of the EU (Q15: “In general, would you say you have a very positive, fairly positive, neutral, fairly negative, or very negative image of the European Union (EU)?”) and the change in employment from 2017 Q1 to 2018 Q1 (from Eurostat).

Figure 43 *Effect of employment on audience opinion of the EU, by country*



Source: Technopolis analysis of Eurostat and Ipsos Mori data, June 2018

This indicates that, even if we have found links between reach and recall of the campaign, and between recall of the campaign and more positive perceptions of EU investment, a significant proportion of the positive change in perception could be related to improving employment prospects in the country, rather than to the campaign itself. It is mentioned by one of the interviewees that the end of the economic crisis and the EU economy growing again had a positive effect as the interest in investments built up.

However, when we test the effect of the campaign, in terms of changes in awareness and perception of the EU and its investment activities, while keeping change in employment as a control variable, we find that recall of seeing the campaign is correlated with two changes:

- There is a positive and significant correlation between change in perception of the EU (Q15 of the IPSOS MORI survey, “In general, would you say you have a very positive, fairly positive, neutral, fairly negative, or very negative image of the European Union (EU)?”) and Spontaneous Recall (Q7, “During the past six months, have you seen, heard or read anything about investments in companies and projects in your country that have been supported by EU funding?”), even when adding change in employment as control variable.

- Positive and significant correlation between change in Awareness (Q13 of the IPSOS MORI survey, “How favourable or unfavourable would you say you are towards what the EU is doing to invest in the economy in your country?”) and Spontaneous Recall (Q7 of the IPSOS MORI survey), again, even when adding change in employment as control variable.

In other words, a significant part of the positive change in perception and awareness among those who say they have seen the campaign is **not** dependent on the background improvements in perception and awareness due to economic recovery. This indicates that, even if some of the positive change in perception could be related to improving employment prospects in the country, we have confirmed that – when we control for this effect – there is still a significant link between recall of the campaign and more positive perceptions of EU investment.

On the other hand, we have to note that this correlation is only found for Spontaneous Recall – i.e. the measure of whether people had seen, read or heard something about EU investments in their country. This is a less precise and certain measure of whether people have actually seen the InvestEU campaign than prompted recall (testing whether people have seen specific ads), but as shown earlier, it does correlate with campaign reach and therefore does seem to reflect an effect of the campaign itself.

Since the analysis is based only on a sample size of 14 (the zoom-in countries for which baseline and post-campaign polling data is available), it would be misleading to attempt to make too precise an estimate on the relative contributions of different factors, or test too many variables at the same time. We can say there is a correlation of positive awareness with both recall and employment change, but the sample size is too small to put precise figures on the contributions of these different factors. For more detail we refer to Annex 1 to this final report (separate report).

4.3 Efficiency of the campaign

This section aims to answer the questions whether the effects/benefits were achieved at a reasonable cost and what factors influenced the efficiency of the observed results.

In Section 0 we assess the cost-effectiveness of the campaign, addressing the following questions:

- Were the WPP communication activities cost effective in comparison to their results?
- Which of the channels and activities used in the campaign proved most cost-efficient?

In Section 4.3.2 we look into the facilitators and barriers, focusing specifically on the cost-efficiency of the campaign implementation.

4.3.1 Cost-effectiveness

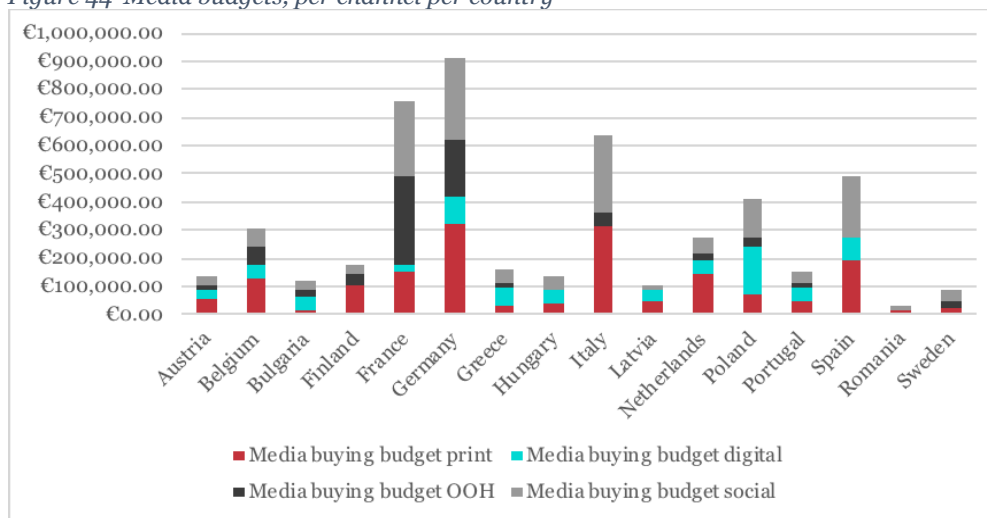
The #InvestEU paid channels (i.e. the advertising campaigns) invested different amounts, in different channel mixes in each country. To analyse cost effectiveness of different actions it is necessary to break this down into components.

Media budgets

In terms of the paid campaign’s media buying budgets, more was invested in countries with larger populations such as Germany (€900,000) and France (€700,000). Meanwhile, the smallest absolute budgets were in the smallest country (Latvia) and those who joined the campaign later (Romania and Sweden). Relative costs can vary between countries and, in addition, the intensity of the campaign in a specific country is clearly related to the media budget spent in relation to the size of the population. While the campaign budgets were higher in larger countries, they did not necessarily spend more relative to the size of the audience they were trying to reach.

Relative to population, the paid media spending intensity was highest in Latvia, with €54 per 1000 population, and lowest in Romania, with roughly €1 per 1.000 population. As a benchmark, as it was used to set the KPI benchmarks for WPP’s campaign, the Pilot Corporate Campaign spent between €75-80 (Germany and Poland) and €400 (Finland and Latvia) per 1000 population.

Figure 44 Media budgets, per channel per country



Source: WPP KPI data, May 2018

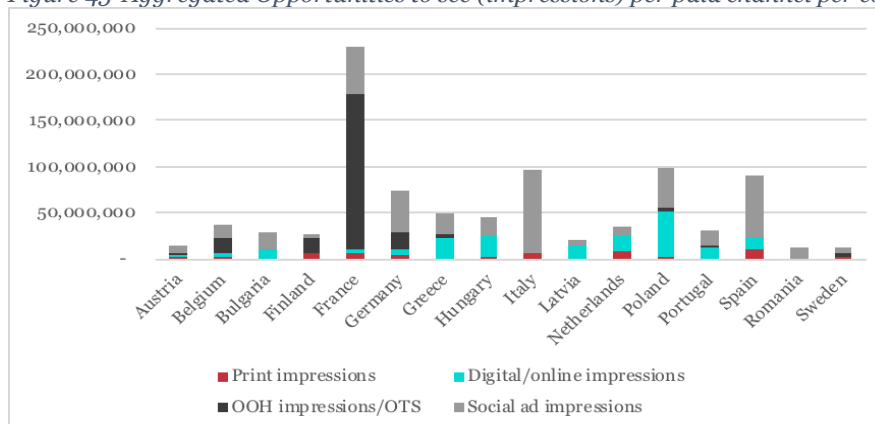
Budgets per channel also varied in a way that was not directly related to audience size, as this also depended on factors such as channel preferences in different markets. Almost as much was spent on print advertising in Italy as in Germany, more was spent in Spain than in France. Equally, the digital advertising budget in Poland was larger than in any other country and the OOH budget in France much bigger than in Germany. The digital advertising budget has been a larger proportion of the total in many of the smaller Central and Southern countries while the print budget tended to be larger in the smaller North and Western countries.

To assess the efficiency of this budget distribution, cost-effectiveness across the countries and channels in terms of opportunities to see (OTS), reach (contacts), engagement and recall was analysed.

Opportunities to see (OTS)

OTS differs from reach, as measured in Section 4.2.1.1 in that it takes no account of repeat exposure of the campaign to the same individual – each potential exposure is counted (even if it is likely the same people have been exposed multiple times). It is also based on a more ‘optimistic’ estimate of campaign exposure than ‘contacts’: i.e. OTS for an item published on a website is estimated as the number of monthly visitors, rather than the number of monthly visitors divided by 28 (to better reflect daily visitors). Figure 45 shows the OTS per paid campaign channel per country, as reported by WPP.

Figure 45 Aggregated Opportunities to see (impressions) per paid channel per country

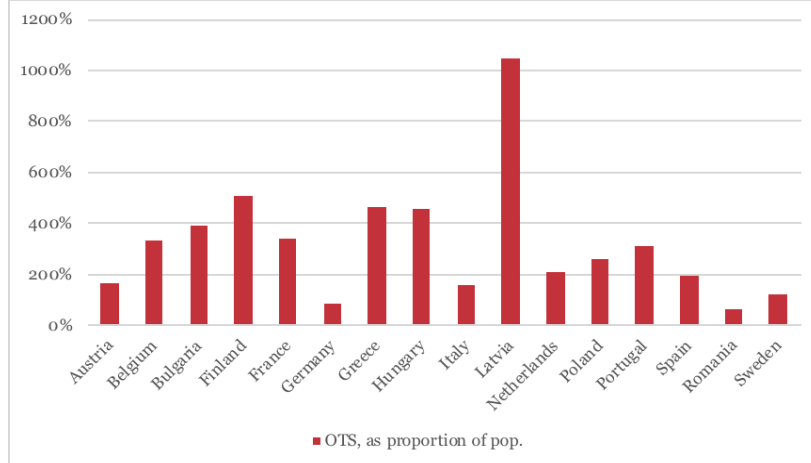


Source: WPP KPI data May 2018

WPP’s estimate of OTS (also called impressions) generated by the OOH campaign in France stands out (more than 70% of total OTS generated by the OOH campaign across all countries). This largely consisted of poster campaigns in railway stations, which exposes very high numbers of people to the opportunity to see the materials (although commuters walking past billboards is qualitatively different to a reader seeing an ad in a newspaper or on their phone as a social media post).

Looking at the OTS via the other three channels: print ad OTS are highest in Spain and the Netherlands, and lowest in Bulgaria, Greece, Latvia and Portugal. Social ad impressions (equivalent to OTS) are highest in Italy and lowest in Finland, Latvia and Sweden. And digital ad impressions are highest in Italy and lowest in Latvia and Finland.

Figure 46 Opportunities to see per country, as a proportion of the population



Source: Technopolis analysis of WPP KPI data May 2018

The *relative* campaign intensity within countries depends on the size of the target audience, and therefore the countries’ populations. 100,000 OTS in Germany means a lower chance to see the campaign than 100,000 OTS in Greece. If we calculate campaign intensity as the number of OTS generated by the campaign per member of the population, the situation is very different: the highest campaign intensity is seen in Latvia, where the campaign generated OTS equivalent to 10 times the national population. Finland is second, with OTS that amount to five times the country’s population. France, while having created by far the most OTS overall, is among the average performers in terms relative to its size – with OTS equivalent to about three times the population. The lowest OTS, proportionate to the population, are seen in Germany (seemingly the lowest intensity national campaign relative to its size) and in Romania (to be expected as a late joiner to the campaign).

If the campaign is equally cost effective in each country, we would expect the OTS per population to correlate with the media spend per population. Indeed, the highest media spend relative to population was in Latvia, which also saw the highest OTS relative to population.

Cost effectiveness: CPM

In terms of cost-effectiveness, the standard advertising measure is the cost of impressions (Opportunities To See), expressed as cost per thousand ad impressions (CPM). Based on WPP’s KPI data, a CPM for the cumulative effect of the campaign of €22 is reported. By dividing the total paid OTS by the total media budget for the paid campaign, an alternative cost-effectiveness figure for the campaign overall, a CPM of €9.87 is calculated.

As a benchmark, the Pilot Corporate Campaign media buying CPM was calculated to be €3.18 (rising to €4.14 when other costs were taken into account). The Pilot Corporate Campaign evaluation also cited the “Missing Part” tax campaign (CPM of €8.66) and the “Ex-smokers are Unstoppable” campaign (CPM

of €3.18). The CPM of #InvestEU paid media is therefore comparable to the “Missing Part” campaign but considerably higher than the other two.

The different campaigns have different objectives and approaches, but it is necessary to consider the different channels’ cost effectiveness to explain the relatively high overall CPM. Based on the total budget divided by the total OTS per channel, we see a very large variation in the cost of impressions per channel and some variance between countries, such as:

- Social media CPM varies the least, from €1.69 in Romania to €7.15 in Finland.
- OOH CPM varies the most, from €2.38 in Finland to €55 in Italy.
- Print CPM shows high variation, from €12 in Sweden to €78 in Germany.

Much of this cost variation depends on market prices and channels, as well as the audiences targeted. For example, some sources cite market prices for OOH advertising as varying from €5.09 (\$5.89) in Germany to €1.05 (\$1.22) in France³². For print, CPM rates in Belgium can vary from €46 (*De Standard*) to €14 (*Het Nieuwsblad Magazine*)³³. While such variation is therefore to be expected, the highest costs (e.g. €55 for OOH in Italy or €78 for print in Germany) are surprisingly high.

The effect of a large print ad in a high-profile newspaper is qualitatively different from that of a promoted post appearing briefly on a phone screen, so there can be some justification – in terms of target audience and prestige visibility – for the much higher costs of generating OTS in print media in some countries. In addition, WPP emphasised a local approach in much of their print media buying, meaning that a high CPM could be related to a more relevant local audience. However, the large variance in OOH CPM seems harder to justify: was the visibility of the ‘Loan of Honour’ billboard campaign in the Marche region really worth 20 times more per OTS than that of the multiple digital displays in Helsinki and other Finnish cities?

In addition, if we take the KPIs set by WPP, the CPM was set to €4 for traditional (print, OOH and digital) channels. Print exceeded this by factors of between two and ten across all zoom-in countries. OOH also proved to be significantly more expensive than this target in all but six countries, and digital in all but seven countries.

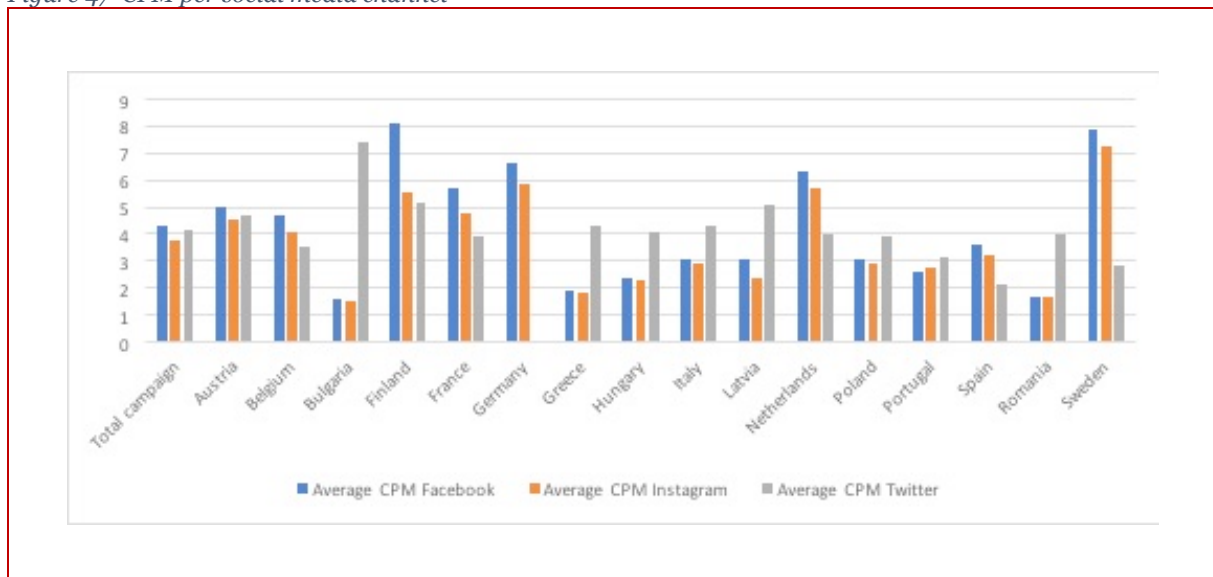
Even if these cost differences simply reflect different market prices, such large differences should at least lead to a reflection on where the advertising budget could best be spent. If costs in a particular channel in a particular country are so much greater than the average, or the alternatives, then it might be better to redirect this budget to other countries or more cost-effective channels – unless there is a very specific reason to target a specific localised audience that justifies an expensive OOH/print ad there. Further explanations and suggestions are offered in our conclusions and recommendations.

For social media, the local market plans in each country included indications on which platform would be more efficient (for example, in countries where Twitter was not such a large platform, communication activities were to focus on Facebook. In some cases, the targeted audience was smaller than expected from the mapping. This happened in at least one country where the Twitter user base was revealed to be smaller, leading to high frequency rate. As a result, the awareness phases were not conducted until the set date, and consideration phases were abandoned. The resulting CPMs per social media platform per country are shown in Figure 47.

³² <https://www.statista.com/statistics/867165/average-cost-per-mile-ooh-ads/>

³³ <http://www.mediahuisconnect.be/uploads/media/5a60673fao353/ratecard-print-2018.pdf>

Figure 47 CPM per social media channel



Source: WPP KPI reporting, treatment by Technopolis Group

As benchmarks, the Pilot campaign evaluation cites the “Missing Part” Facebook campaign’s CPM as high as €16.95, whereas the Pilot itself recorded CPMs of between €4.21 and €6.10. More generally, eMarketer cites a social ad CPM of €4.52 (\$5.23)³⁴ while Adstage says Twitter ads’ median CPM was €5.58 (\$6.46) in Q1 2018³⁵.

In comparison, the #InvestEU Facebook CPM averages €4.20 and varies between €1.62 (Bulgaria) and €8.08 (Finland). This compares well with both previous campaigns and market rates. The #InvestEU Twitter CPM averages €4.17 and varies between €2.13 (Spain) and €7.41 (Bulgaria). This also compares well with market rates.

As benchmark KPIs, WPP was set the CPM targets of €3 for Facebook and €6 for Twitter. **While the Twitter target was reached, the Facebook target was not.** In addition, Instagram had the lowest CPM of all – indicating it was the most cost-effective channel in terms of generating OTS.

Cost per click (CPC)

It is also important to consider the **cost-effectiveness relative to engagement**, measured by cost per click (CPC). The **average CPC for digital advertising** was **€2.38**, compared to **€1.11 on Twitter and €0.39 for Facebook**. On the other hand, Instagram proved very expensive by this measure, with an average CPC of €16.69.

As benchmarks, the Pilot campaign recorded CPC rates of between €2.34 and €3.14 for its digital advertising, and from €0.36 to €0.39 for Facebook, while the Missing Part campaign is cited in the Pilot evaluation as having a CPC rate for Facebook of €0.68.

The #InvestEU campaign therefore performed at the lower end of the cost range for these channels, compared to previous campaigns. On the other hand, some sources cite average CPC rates for 2017/2018 as €0.31 (\$0.36) for Twitter³⁶ and €0.84 (\$0.97) for Facebook³⁷. Compared to these more general industry figures, Facebook was indeed more cost effective, while Twitter underperformed.

³⁴ <https://www.emarketer.com/performance/channel/58fe4ebad2670009840a9edf/58e401313ff5e905a0f34c93>

³⁵ <https://blog.adstage.io/2018/05/31/twitter-ads-benchmarks-q1-2018>

³⁶ <https://blog.adstage.io/2018/02/15/twitter-ads-cost-2017>

³⁷ <https://adespresso.com/blog/facebook-ads-cost/>

In terms of driving target audiences to the website, digital ads were less cost effective than most social ads. However, Instagram, in some countries, was very expensive, with very high CPC in Germany (€66), the Netherlands (€27) and Poland (€26). Overall, the CPC rates were lowest and varied least on Facebook out of the three relevant channels. **Facebook seems the most reliably cost effective in terms of driving traffic to the website.**

The choice of channel, in terms of cost effectiveness, therefore depends on the main objective of the specific ad campaign. Where ads were designed to simply generate OTS and achieve reach, Instagram was capable of being more cost effective (although a lower user base means it will only generate reach up to a limit). On the other hand, where the objective is to drive click-throughs to the website, Instagram was disproportionately expensive, and Facebook was the more reliably cost-effective. Decisions on social media ad buying therefore have to be based on the objective of the specific campaign, not just the market rates in the country.

Cost per reach and recall

Comparing the budgets spent to the deduplicated reach (in contacts) per country allows an estimation of how much it costs to reach each citizen at least once.

Using this cost calculation, most was spent on Latvians (~€62). As well as reflecting different market prices, this figure reflects the cost of multiple exposures to the campaign. The campaign in Latvia was so intense that on average, each person potentially reached was likely to have been reached more than four times (a frequency of contact of 4.17). In terms of reach alone, it is likely that a similar level of reach could have been reached at a lower cost by reducing the frequency of contact – i.e. in Latvia, the OTS generated via digital advertising was twice the reach (implying people reached were on average reached twice), while on social media OTS was more than three times the deduplicated reach (implying people were reached three or four times). In terms of recall, this could be a good thing – repeat exposures are more likely to be recalled – but in terms of optimising the cost of reach, some of the social media budget may have been more cost effective if used in other channels.

In terms of the cost of reach, just as with OTS, the individual channels differ among the zoom-in countries. For example, print advertising is the most expensive in almost all countries, and OOH is the costliest in Italy and the Netherlands. Social media advertising on the other hand tends to be the least expensive relative to reach, just as with CPM.

Overall, however, through regression analysis, a **high positive correlation has been found between the budget spent (relative to population) and the reach (as share of population) of paid media.** This indicates that, overall, the deduplicated reach of the campaign in each country does reflect the budget spent there.

This is true for the overall figures, but also for each of the channels analysed (print, digital, OOH, and social). The correlation matrix below shows how the various reach and budget figures are correlated with each other.

Table 10 Regression analysis channels and budgets

| Correlation | Reach Paid - All | Reach Paid - Social | Reach Paid - OOH | Reach Paid - Digital | Reach Paid - Print |
|---------------------------|------------------|---------------------|------------------|----------------------|--------------------|
| Budget per 1000 - Print | 0.59* | 0.27 | 0.60* | 0.34 | 0.70* |
| Budget per 1000 - Digital | 0.66* | 0.70* | -0.44 | 0.84* | -0.09 |
| Budget per 1000 - OOH | 0.09 | -0.4 | 0.88* | -0.39 | 0.52 |
| Budget per 1000 - Social | 0.65* | 0.69* | 0.49 | 0.53 | 0.18 |
| Budget per 1000 - Total | 0.72* | 0.48 | 0.64* | 0.57* | 0.46 |

Source: Technopolis analysis of WPP KPI data, May 2018

The graph below shows the behaviour of the overall deduplicated reach figures for paid media compared with the media budget of the #InvestEU campaign in each country. The correlation of media budget intensity with the share of the target audience reached is very strong. Above the line, relative reach exceeds the trend in terms of budget intensity – making **Hungary, Portugal and Greece more cost effective** in terms of citizens reached per euro. Below the line, Germany, Italy and Austria appear to have been less cost efficient.

The scatter plots in Figure 49, below, present an even stronger (still positive) correlation between budget and reach figures for each of the paid media channels.

Figure 48 A scatter plot showing correlation of total deduplicated paid contacts in relation to media budgets

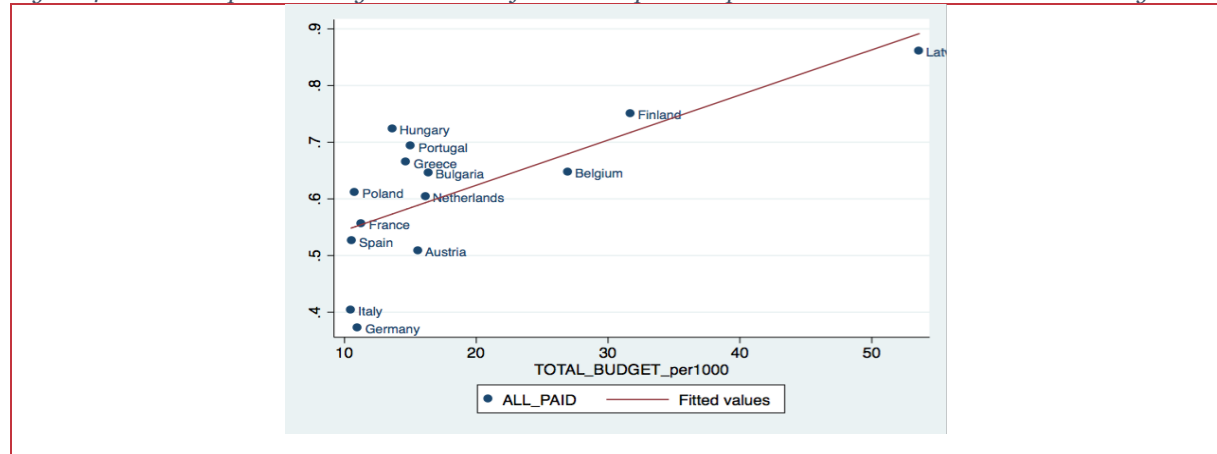
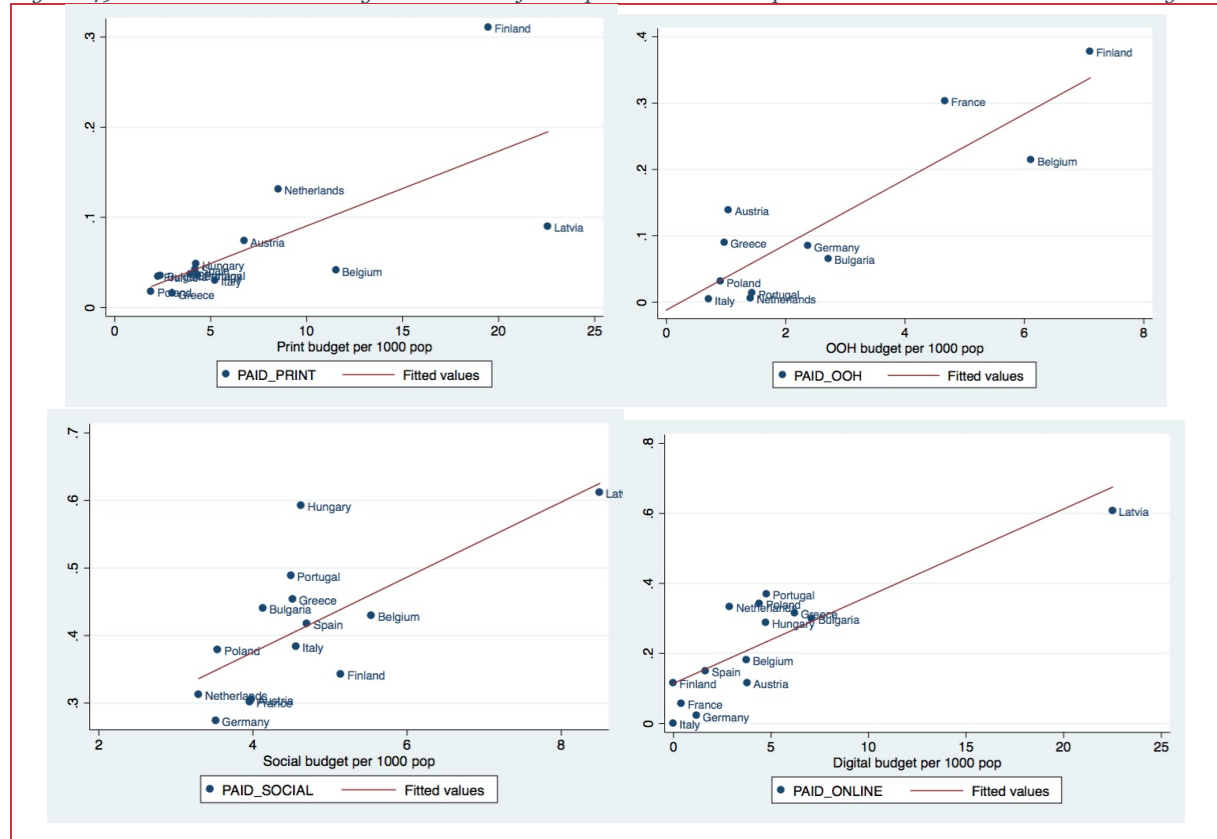


Figure 49 Scatter charts showing correlation of deduplicated contacts per channel in relation to media budgets



Source: Technopolis analysis of WPP KPI data, May 2018

A few outliers are evident: the Latvia print campaign was less cost efficient than average, as was the social media campaign in Finland; meanwhile the OOH campaign in France performed above the trend in terms of budget intensity per audience share reached, as did the social media campaign in Hungary.

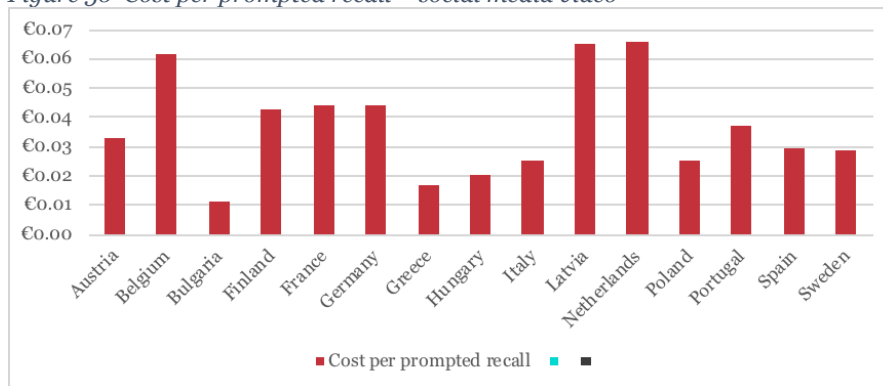
Cost per recall

Looking at the two measures spontaneous specific recall and prompted recall (see 4.2.1.2) – we can calculate the cost per citizen remembering the campaign (but only for 15 of the zoom-in countries, as Romania was not covered in the polling for recall). The costs for **spontaneous specific recall** – budget spent per additional citizen recalling EU investment – vary between €0.22 in Portugal and €1.56 in Austria.

Germany and Latvia are interesting to highlight as examples of higher than average cost per additional citizen (€1.10 and €1.34 respectively) – but for different reasons:

- For Latvia, the overall campaign intensity (i.e. spend per citizen) was too high. Aggregated contacts were equivalent to 350% of the population – thus, a reduced budget, meaning fewer aggregate contacts, would most likely still have achieved similar results in terms of deduplicated reach and recall
- For Germany, the media budget intensity was probably too low to have a strong impact on the target audience. Aggregated contacts amounted to only 50% of the population (the lowest among the original 14 core countries). Impact in terms of recall is therefore more difficult to detect through a national poll

Figure 50 Cost per prompted recall – social media video



Source: Technopolis Group analysis of WPP KPI data, May 2018, and Ipsos Mori polling, June 2018

In terms of **prompted recall of the social media video ads**, compared to the budget spent on social media in each country, the costliest countries were Latvia and the Netherlands (both at €0.07) and Belgium (€0.06). Again, while the budget spent in Latvia was more than needed, meaning much of it was spent on repeat exposures, in Belgium and the Netherlands the aggregate reach was at the lower end (equivalent to 60-80% of social media user base) and therefore possibly too low to be effective in terms of recall. Cost per reach was also above average in Belgium and the Netherlands, contributing to a higher cost per recall.

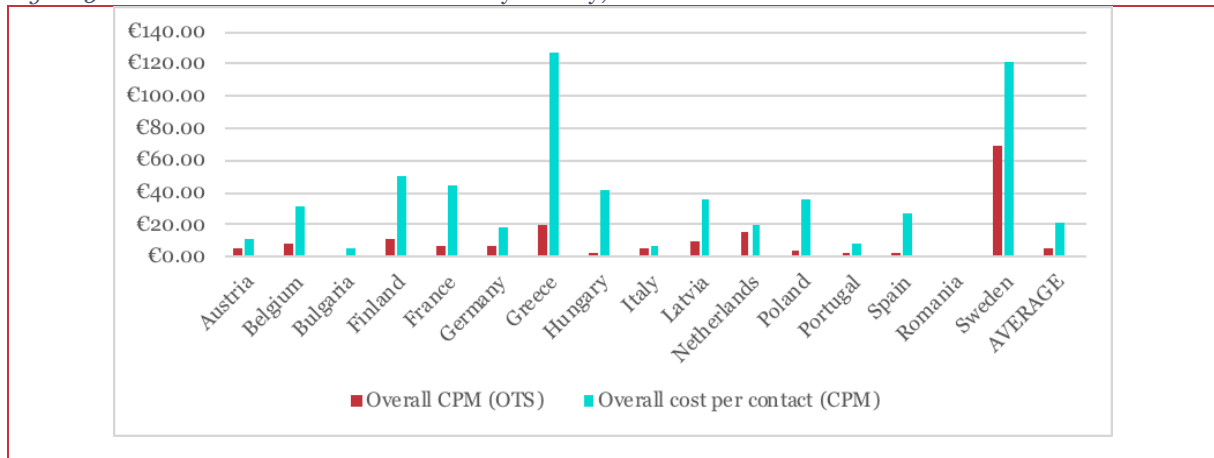
The lowest cost per recall is seen in Bulgaria, where recall was highest and where social media CPM was lowest. In the case of Greece, Hungary and Italy – the three lowest costs per recall after Bulgaria – the deduplicated reach of social media ads is equivalent to just over 90% of the number of social media users in the country (90-96%). At the same time, the average “frequency” of exposure to the ad by each person reached is between two and three times.

This indicates that there is an **optimal budget spend** in terms of the frequency of exposure to an ad in order to achieve a certain level of (deduplicated) reach and recall: too little, as in Germany, and the level of exposure to the campaign materials is too low to have a significant impact on recall; too much (and too much spent through the same channels), and much of the budget is spent on multiple exposures to the same people – reducing its cost effectiveness.

Paid media collaborations

WPP’s proposal was to use about 12% of the total media budget for content promotion and media-cooperation. While they were relatively few, in relation to the volume of ads and earned coverage, paid collaborations took place in all channels: digital and social media, as well as print, TV and radio. WPP reports the budget as €811,598.96 – equivalent to 14% of the paid media budget.

Figure 51 Paid media collaborations – CPM by country, in terms of OTS and contacts



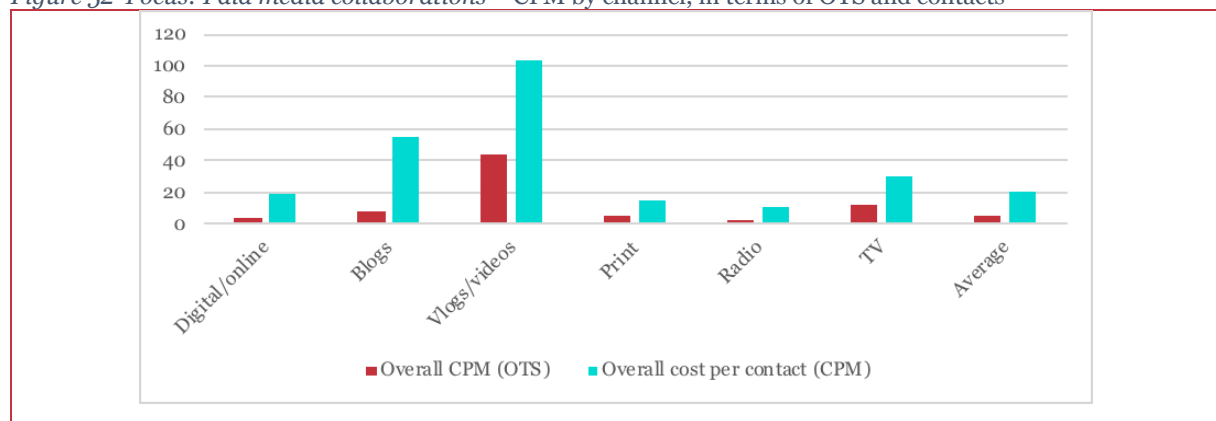
Source: Technopolis analysis, based on WPP KPI data May 2018

In terms of OTS and reach, paid collaborations appear to have been relatively cost effective overall. The average CPM (in OTS) for paid collaborations is €5.74, to be compared with the average CPM for paid ads of €9.87. Cost per 1000 contacts is €21, compared to the average for paid ads of €20, and this might be a more realistic comparison since it does not overstate the reach of online media in the way that OTS do.

On the other hand, **costs varied hugely between countries**, with Greece and Sweden by far the most expensive – costing over €100 per 1000 contacts. In addition, paid collaborations have costs over and above the fee paid to the media partner – usually more so than advertising.

If we divide the total budget for media collaborations (€800,000) by the approximate reach in contacts (35 million) then the cost per 1000 contacts is actually over €40, which is **much higher than the approximate cost of reach for the campaign overall**.

Figure 52 Focus: Paid media collaborations – CPM by channel, in terms of OTS and contacts



Source: Technopolis analysis, based on WPP KPI data May 2018

In terms of channel, **vlogs/Youtubers were the most expensive**, with a CPM (in OTS) of €40 and a cost per 1000 contacts of €100.

On the other hand, while click-through rate is not reported for media collaborations (so CPC is not calculable), vlog/YouTube posts did have a high engagement rate: 5.46 on average (compared with the average of less than 0.94 for social media ads and a click-through rate of 0.43 for digital advertising). **On the basis of engagement, therefore, paid vlog/YouTube collaborations appear to be relatively cost effective.** The choice of such collaborations should be based on specific objectives, whether reach or engagement, in future.

Earned and owned channels

For earned and owned channels it is much more difficult to put a cost on the OTS or contacts achieved as outputs of the campaign. The campaign budget allows comparison of some specific actions, but for the most part only broad categories. Taking into account development/production as well as dissemination/outreach costs we can make some broad comparisons between total budget spent vs total OTS/contacts/deduplicated reach achieved via paid channels vs earned coverage.

It should be noted that estimating CPM for paid media in this way, taking into account all attributable costs from the budget, produces a cost midway between the WPP estimate (€22) and our estimate (€9.87) for average CPM based on media buying budgets only.

In terms of OTS, the CPM for earned coverage shows a much lower cost of impressions than paid media – but this is largely an effect of the way OTS is calculated for online media, tending to overestimate how many people are really reached (based on monthly website visitors). Hence “contacts”, based on an estimate of *daily* traffic to the website, are a better guide to reach.

Based on aggregate contacts, or deduplicated reach, paid channels appear to be more cost effective than earned overall, with a cost per contact of about 60% that of earned coverage.

Further calculations related to the owned channels are included in the Methodological Report in Annex 1 to this final report (separate report).

Performance against the set objectives - overall findings

As with reach and recall, KPI benchmarks for cost-effectiveness were agreed between WPP and DG COMM in June 2017. They were set on the basis of terminology from the AMEC integrated evaluation framework, Kantar and Mindshare projections for paid media, local network projections for earned media, and benchmark analysis of the ‘EU Working for You’ campaign. Table 11, below, compares the campaign performance – both as measured by WPP and by the evaluation team – against those benchmarks.

Table 11 Performance against KPI benchmarks for cost-efficiency – paid media

| WPP KPI Benchmarks | Results as measured by WPP campaign team | Results as measured by evaluation team |
|---|--|--|
| Global CPM: | €22 | €9.87 ³⁸ |
| €4.00 for traditional media (print, online, OOH) | CPM traditional media: <ul style="list-style-type: none"> • €3.89 online • €3.79 outdoor • €26.80 print (due to regional titles and higher-quality full-page ads) | <ul style="list-style-type: none"> • €4.30 online • €3.34 outdoor • €26.35 print |
| Social media: <ul style="list-style-type: none"> • €3.00 for Facebook • €6.00 for Twitter | Social media <ul style="list-style-type: none"> • €3.87 CPM Facebook • €4.38 CPM Twitter | <ul style="list-style-type: none"> • €3.76 CPM Facebook • €4.17 CPM Twitter • €3.71 CPM Instagram |

Source: WPP KPI benchmarks and Technopolis Group treatment

Print was more than six times more expensive than foreseen, in terms of its benchmark KPI for CPM (€4). OOH and digital were within their CPM benchmarks on average but significantly more expensive than their targets in half the zoom-in countries.

For paid social media, **while the Twitter target was reached, the Facebook target was not.** Instagram was the most cost-effective channel in terms of generating OTS.

4.3.2 Efficiency in the campaign implementation

The evidence collected during this evaluation and reported throughout this report suggest that factors influencing negatively the effectiveness – and thus, efficiency – of the campaign implementation were mainly related to issues in the adequate planning of various activities and processes.

First, as mentioned in Section 3.1.1, above, the #investEU campaign was designed as part of an “**information and communication sequence**” whereby the first part focused on targeting the stakeholders of the Investment Plan (i.e. the business community) and was implemented in the REPs by the European Semester Officers (ESO). This part of the ‘sequence’ was implemented in 2016 and partly overlapped with the preparatory activities for the second part of the sequence.

From the interviews the picture emerged that in many cases, the sequence and the overlapping in the time frames caused an initial confusion in the REPs. The shift in target audience for the #investEU campaign implied the need for a change in approach, strategy, channel, and responsible officer in the Representative offices. In several countries, and especially the non-zoom-in countries, this confusion persisted even during the campaign, with SMEs and business-oriented stakeholders still being a major focus of the communication strategy of the REPs, and the ESOs still being in charge.

Closely related to the issues caused by the overlapping timelines of the first and second part in the ‘information and communication sequence’ was the **launch of the EDICs’ activities** prior to the launch of the activities in the national campaigns. As we mentioned in Section 4.2.3.4, the timing of both the call and the launch of the EDICs’ activities strongly influenced the focus of these communication activities: 20 out of the 51 activities in the zoom-in countries, i.e. 40%, and 13 out of the 16 activities in the non-zoom-in countries (i.e. 80%) targeted the business community only.

Desk research and interviews also point at an underestimation of the **project selection process** – both in terms of number of projects to be showcased and the effort required for their selection. The

³⁸ We believe WPP’s reported CPM for the cumulative effect of the campaign of €22 is based on a faulty calculation. Alternatively, by dividing the total paid OTS by the total media budget for the paid campaign, a cost-effectiveness figure for the campaign overall, a CPM of €9.87 is calculated.

Terms of Reference for the campaign contracting gave as indication the “creative treatment of max. 30 emblematic stories” out of which “max. 10 emblematic stories will be selected to be treated in all EU languages for use as part as the toolbox”. Instead, at the end of March 2018, in total 243 projects were showcased, based on an evaluation of over 520 projects, and 57 projects were selected as ‘emblematic stories’ (see Section 3.2.1, above). Initially, a 6-week period was foreseen to identify the projects that would be the basis of the campaign. It turned into 4-5 months overall.

4.4 Coherence of the campaign

This section considers the issue of campaign coherence, internally as well as externally. Internal coherence (see Section 4.4.1) relates in the context of this study to the extent to which the campaign, and the various communication actions, tools and channels were coherent, operating in an integrated and aligned fashion, supporting the stated objectives, targeting the intended audiences and communicating on the intended themes and messages of the campaign. External coherence, covered in Section 4.4.2, relates to the coherence of the #InvestEU communication activities with other EC and EU communication activities, and more generally also with other major national campaigns and initiatives communicating on the benefits of EU funding to wider audiences.

When assessing the above points, the study team concentrated on the issue of coherence, considering what was implemented. As such, the section draws extensively on reporting data, as well as on data collected via interviews. The section does not consider coherence with the original planning documents for local outreach activities (intended to be implemented by the WPP) which have been provided by the EC, as it is understood that these have been reviewed during implementation.

Finally, when considering the sections results, it is important to note that high levels of coherence may go with low effectiveness and/or low levels of relevance and vice versa. Indeed, as many interviewees have highlighted, there is, with regard to internal coherence, a need for the campaign to **strike the right balance between an overall coherent approach and local tailoring and adaptation ensuring local relevance**.

High levels of internal coherence may in practice be at odds with the need for local tailoring and adaptation. Moreover, a coherent approach in terms of outreach may not necessarily deliver the expected results – for example in terms of delivering on a narrative going beyond the project level (i.e. limited #InvestEU message, beyond that of project specific content) or generating the expected earned media interest.

With regard to external coherence, overlaps might not necessarily lead to inefficiencies, insofar that multiple actions with similar messages may improve overall effectiveness – either by reaching out to different audiences or by reinforcing recall and generated awareness.

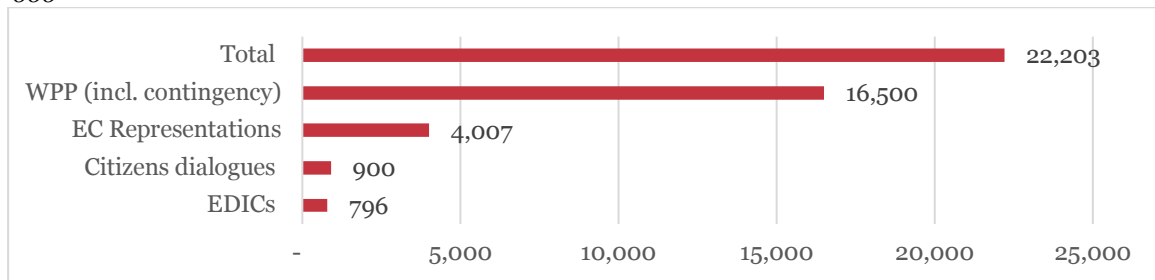
Therefore, the findings and conclusions of this section should be read in conjunction with the results of the above sections.

4.4.1 Internal campaign coherence

With a budget of more than €20M and a combined centralised and decentralised approach to conceptualisation, design, implementation and validation, the #InvestEU campaign has involved a wide range of actors, from the EC corporate level, EC representations, various cross European and local offices within the WPP group and locally also the EDIC.

The budgetary structure and approval processes creates an additional level of complexity. While most of the budgetary resources have been allocated to the WPP group, as a key implementer, funds have been allocated to the Representations directly for their own activities. Additional resources have been allocated for the organisation of citizens dialogues (€0.9M) and EDIC activities (€0.8M).

Figure 53 Budgetary breakdown of the campaign, actuals*** (incl. 2017 and 2018** funding for the REPs), in '000



Source: DG COMM, Technopolis calculations

*actuals for the WPP, allocated grants for the EDICs and approved activities for the EC Representations

** covering “initiated” and “validated” projects in 2018

The approval and management processes for communication activities funded under these activities differ. The aspects implemented between the EC and the WPP group, has one system for validation of content and communication approaches and channels– under the EC Representations (validation of actions under the local outreach strategies) and DG COMM Directorate A (lead overall campaign design, social media, paid outreach, toolkit, transnational press trips, and final validation of content and actions under the local outreach strategies).

Activities implemented under the budget allocated directly to the EC Representations have a different management and approval system, under Directorate B of DG COMM. Finally, EDIC and Citizens Dialogues follows other approval, management and implementation systems.

Different management processes and systems raise the question of coherence at different levels:

- Coherence between the campaign approach overall and the activities implemented at national level by the WPP group and the EC Representations in the zoom-in countries
- Coherence between the core campaign and the actions managed directly by the EC Representations under the “Representation envelope”
- Coherence between the campaign and the actions managed by the EDICs

The following subsections consider internal coherence under each of these angles. Citizens dialogues have not been considered, due to lack of data.

Internal coherence - the campaign approach overall and the activities implemented at national level by the WPP group and the EC Representations in the focus countries

When considering the ‘core’ campaign and interlinks between the overall concept, the key messages, target audiences and channels used, the campaign is coherent overall. The core principles of the campaign, with a centralised defined concept and approach, with local tailoring of channels and content to meet local concerns and areas of interest, appear from a coherence perspective to have worked well.

Likewise, the intended PESO media mix model, presented in WPP original proposal, appears in practice to have operated well, combining Paid, Earned, Social and Owned channels, managed in an overall coherent fashion – with centralised/corporate management of certain channels, and decentralised (Representation) management of other channels.

With regard to the other campaign aspects, internal coherence is generally satisfactory:

- The **selection of the flagship projects**, including the topical coverage and key themes, is coherent with the project driven storytelling approach and the key messages – articulated around

“the EU creates a better future for all of us”; “the EU boosts job creation” and the “EU removes barriers”³⁹, and more generally the federating message “opportunities start here”.

- The toolkit appears well tailored and follows closely the logic of the campaign, providing the baseline for a cross country consistent approach in terms of key content and visuals. However, the delay in delivery implied that it was not used to the optimal extent – especially by the EDICs.
- In general, the different material and content produced, across owned, paid and shared channels are consistent with the campaigns creative approach
- The cancellation of the generic campaign videos, following their limited success online, is coherent and relevant, not only given their modest results, but also with the strong project story approach underpinning the campaign. Support in terms of visual materials for organic social media reach for local outreach is coherent with the general social media approach. Delays in delivery of these posts, however, meant that the original plan – using these posts between waves of paid promotion – could not be implemented
- The organisation of the cross-country press visits has been coherent with the general approach insofar as they have aimed to ensure a level of cross-country visibility of stories through earned media coverage. They have also generated a very significant share of the total earned reach (23% of all earned pieces of coverage, and 30% of total earned OTS and contacts⁴⁰).
- The general interlinks between different campaign channels is good, with extensive use of the campaign website as the key reference source for additional information

The main potential issue related to internal coherence is that of consistency between the objectives and overarching strategy and the local outreach plans and activities in the 16 zoom in countries. The bottom up approach of the campaign, is recognised by all main internal stakeholders as one of the major successes of the campaign, allowing tailoring of the general approach to local issues of concern and relevance⁴¹. However, the localised approach also represents a coherence risk, and thus a need to coordinate local content with the overall strategy, ensuring that the common EU message is maintained in communication on the ground.

Judging from the feedback collected (see Section 4.2.3.3, above), the coordination processes have been appropriate and sufficient to ensure internal coherence. Interviewees from the EC as well as the WPP group at national level generally felt that there was an appropriate level of coherence between the WPP local outreach strategies and the corporate campaign overall. Nobody pointed towards clear overlaps, duplication of efforts or mismatches between the locally led activities and the objectives the campaign.

Where issues occur with coherence, they are country specific. They mainly related to selected activities, having as major purpose to promote funding opportunities among potential beneficiaries of EU grants and are to be set within the context of the perception that the #InvestEU campaign constituted a continuation of the preceding stakeholder campaign.

Internal coherence – the core campaign and the Representations actions implemented under the budget available directly for the Representations

With the specific budget for Representations being available on a “first come, first serve” basis (subject to action approval by DG COMM following the specific guidelines), actions undertaken by EC Representations (and associated budgets) are unevenly distributed across Member States. Overall, about 71% of total budgets for 2017 and 2018 #InvestEU actions are spent in the zoom in countries.

³⁹ WPP, Communicating the Investment Plan and other jobs and growth initiatives, campaign key features, undated document

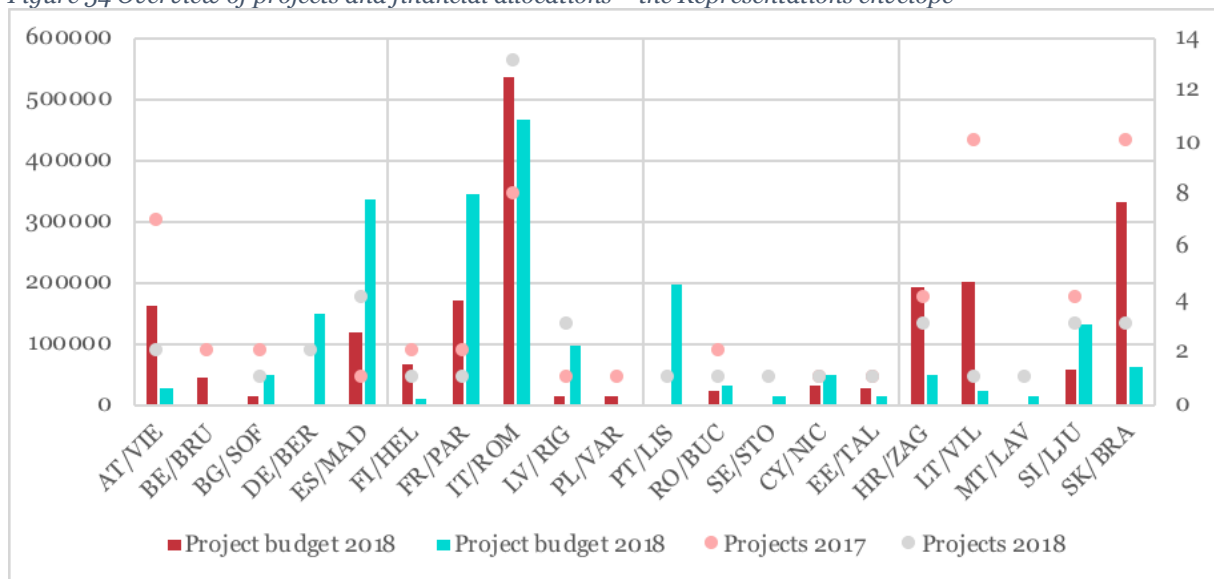
⁴⁰WPP, Third interim report, #InvestEU – Communicating the Investment Plan for Europe and other jobs and growth initiatives, June 2018

⁴¹ The fact that the bottom up approach is considered as one of the major successes of the campaign (also in the light of previous EC campaigns), however, does not mean that further localisation and adaptation, in some cases would have been desired by the EC Representations, as discussed in section 4.2.3.3, above.

In 2017, a total of 57 actions covering the #InvestEU campaign were implemented from the Representations’ budget. The total budget was just below €2 million. For 2018 43 projects covering #InvestEU are reported to have been validated or initiated, with a budget just above €2 million.

As it can be seen from the chart below, four EC Representations (Madrid, Paris, Rome and Bratislava) have benefited from more than half of the budget and have implemented most actions (42% of the 100 actions and 58% of total budgetary allocations). The uneven distribution is noted for both years, and reflects to our understanding the “first come, first served” allocation. The Rome Representation is by far the main beneficiary – followed by three non-zoom- in countries in 2017 (Zagreb, Vilnius and Bratislava – with a total budget allocation of 64% including Rome). In 2018, main Representations are, Rome, Paris and Madrid (56% of total budget).

Figure 54 Overview of projects and financial allocations – the Representations envelope



Source: DG COMM, Technopolis calculations

The EC’s guidelines on actions which can be funded (from 2017 and 2018⁴²), provides the background and context for funding of actions under the #InvestEU campaign. These guidelines are in line with the corporate campaign(s) logic and approach. They also highlight that communication which may duplicate campaign's deliverables should not be undertaken, and list a set of desired type of actions, which are line with to corporate campaign focus (actions with a regional focus, collaboration with influencers and other actions with a likely impact on broad audiences). The 2018 guidelines also highlight the need to link local actions to the corporate campaigns by using the relevant visual identity, campaign materials, hashtag/signature and linking to campaign websites and – whenever possible - find hooks to link the key messages of the campaigns to national and/or local events, anniversaries, milestones etc.

However, the 2017 guidelines also appear to be open for other activities by stating that the scope of the funding may (in addition to underpinning corporate campaigns and facilitate country-specific communications to broad audiences on the top corporate priorities) also “Support/complement day-to-day political communication, stakeholders' relations and media relations”. The 2018 guidelines have a narrower focus. They stipulate that communication is to “underpin corporate campaigns and facilitate

⁴² Additional corporate budget: what for? A guide to local actions, January 2018 and March 2018

country-specific communications to broad audiences on the top corporate priorities⁴³. Moreover they define the “ambivalent citizens” as a target audience. This narrower focus suggests that learnings from the campaign are being applied.

In terms of what has been implemented there is only limited data available⁴⁴. Coherence, in terms of target audience, messages communicated, and tools used, is therefore difficult to assess. However, judging from the interviews undertaken and a review of the available material, there is, overall, a satisfactory level of coherence between the actions led by the Representations and the overall campaign. Interviewees generally highlighted that **all actions managed by the Representations were aligned and followed logically from the overall campaign approach as well as from the local outreach strategy**. While some interviewees noted that there was a planning mismatch between the Representations’ own strategies, and that alignment could be improved, only a few interviewees considered that the actions funded under the Representation envelope – or more broadly undertaken by the Representations - overlapped with those implemented by the contractor. This is also illustrated by the fact that Representations mostly did not make a distinction between the funded activities under the “Representation envelope” and those under the WPP contract. A satisfactory level of coherence (tools and messages) could be expected also, given the Representations’ role in the management of the local outreach strategies as well as their role in terms of proposing actions for funding under the Representation envelope.

In contrast, if a stricter criterion of coherence is being applied, i.e. a requirement that only activities which would be out of scope of the WPP actions, should have been funded, results are more mixed. This is because many of the actions funded were in practice advertising and advertorials (which was not excluded by the guidelines⁴⁵).

Short descriptions of activities are not available for all actions. However, based on the available data, it may be estimated that at least half of the budget spent by EC Representations was in 2017 spent on advertising and advertorials (including paid supplements). 70% of the budget for advertising and advertorials was spent in the zoom in countries, with most resources being spent in Italy.

In 2018, shares for advertising and advertorials is lower (30%) but again concentrated (in Italy and Spain). An additional significant cost 2018 is video production, undertaken by the Paris Representation (345,000 or 18% of total resource spent in 2018). The remaining activities funded appear to be mostly events (incl. events for press). There is insufficient data to consider the extent to which these events directly or indirectly aim to reach out to the stated target audience of the campaign.

It is important to note that the fact that activities to some extent overlap between the different internal actors involved, does not necessarily mean that the campaign generated duplication of efforts. Indeed, the undertaking of local press trip and other press activities, advertising and advertorials and the production of video content may have complemented the activities undertaken under the WPP envelope – addressing unmet needs as identified by the EC Representations. However, the **very uneven budgetary distribution** does raise the question of coherent and efficient resource allocation across the different earned, owned, paid and shared channels and across Member States.

This issue seems particularly prominent for media buying/advertising in Italy. Media buying in Italy under the WPP contract in traditional channels (print, online and out of home) consumed one of the larger shares of total “traditional media” buying under the WPP contract (10.6% or 350,000 Euros). However, if one also considers print and out of home advertising funded under the Representation

⁴³ The top corporate priorities not specified in the document.

⁴⁴ Only the 2017 and 2018 guidelines to the EC Representations and a list of projects funded and interview results have been available for this analysis

⁴⁵ Both the 2017 and 2018 guidelines included a list of examples of activities which could be funded. This list included events and PR activities, media relations and digital and multi-media. Under the heading media relations, the example of targeted adds was included (specified as “Targeted adds in selected Radio/TV programmes, in thematic magazines and thematic sections of print/online media, dedicated EU-supplements, etc” in 2018 and as “Targeted ads: in selected business Radio/TV programmes and in economic sections of print/online media, dedicated EU-supplement” in 2017)

envelope, in 2017 the total Italian budget for media buying in traditional media is above 730,000 – representing a very significant share of total paid media spend, across different channels. Similarly, total resource spend on paid outreach is significant in Spain if both 2017 and 2018 is considered – due to paid media spent across all funding mechanisms (WPP contract, the Representation envelope and paid media spent under the EDIC grants).

Table 12 Overview of budgetary spent of the “Representation envelope”

| | Total | | Zoom in countries | | Non-zoom in | |
|---|----------------|-----------------------------|-----------------------|-----------------------------------|-----------------------|-----------------------------------|
| | In ‘000 | | Budget ‘000 | % of spend | Budget ‘000 | % of spend |
| 2017 budget | 1,950.6 | | 1,116.5 | 57% | 834.1 | 43% |
| 2018 budget*** | 2,056.5 | | 1,716.0 | 83% | 340.5 | 17% |
| 2017 main actions | In ‘000 | % budget of the year | Budget in ‘000 | % of spend within category | Budget in ‘000 | % of spend within category |
| Advertising and advertorials (54% of total spent in IT) | 992.9 | 51% | 708.8 | 71% | 284.1 | 29% |
| Video production | 58.8 | 3% | 45.3 | 77% | 13.5 | 23% |
| Events (in the widest sense: press trips, conferences, participation in festivals etc.) | 345.9 | 18% | 100.3 | 29% | 245.6 | 71% |
| Other activities | 59.3 | 3% | 39.3 | 66% | 20.0 | 34% |
| Unspecified activities | 493.7 | 25% | 207.8 | 42% | 285.9 | 58% |
| 2018 main actions | In ‘000 | % budget of the year | Budget in ‘000 | % of spend within category | Budget in ‘000 | % of spend within category |
| Advertising and advertorials (48% of total spend in ES, 40% of total spent in IT) | 620.0 | 30% | 580.0 | 94% | 40.0 | 6% |
| Video production (92% FR) | 375.0 | 18% | 375.0 | 100% | 0.0 | 0% |
| Events (in the widest sense: press trips, conferences, participation in festivals etc.) | 637.5 | 31% | 502.0 | 79% | 135.5 | 21% |
| Other activities* | 29.0 | 1% | 29.0 | 100% | 0.0 | 0% |
| Unspecified activities** | 395.0 | 19% | 230.0 | 58% | 165.0 | 42% |

*other activities: typically press work, but where it is unclear if the activity is paid media/advertorials or web/online activities

**unspecified means that the activity is not defined (e.g. “Invest EU - Promote the EUInvest campaign” or “Open door to EU projects” - Priority 1”) or that the nature of the activity cannot be deducted from the description (e.g. “PODIM 2017”, “#InvestEU Branding Campaign” or “engaging elderly population in rural areas”)

*** covering “initiated” and “validated” projects

Source: based on budgetary and overview data of funded actions, provided by DG COMM and analysis by Techopolis

Internal coherence - the core campaign and the EDICs

EDIC communication activities were funded under specific action grants, based on restricted calls for proposals addressed to the EDICs (and managed by the Representations). In total 67 InvestEU EDIC

projects were funded – with a budget of maximum EUR 15,000 per project (95% co-funding rate). Projects included typically several communication activities⁴⁶.

Judging from the data available on the EDIC projects/activities it may be concluded that in terms of topical coverage and overarching messages, EDIC actions under the specific call/projects retained, are aligned – if the topic is broadly related to “promotion of the investment plan as well as other EU programs in favour of jobs, growth & investment”. This finding is also supported by a clear majority of the EDIC and Representation interviews, where most interviewees considered that **actions of the EDICs were complementary to those of the corporate campaign** – or at least did not duplicate those.

In contrast, if a narrower definition of topical coverage is used (showcasing concrete benefits to citizens on the ground of EU investment) and if the intended target audience is that of the European public, aged over 18, the level of coherence vary across Member States (and across EDIC projects). Similarly, if it is assumed that the EDICs work would be concentrated on local, physical and PR outreach complementing earned and paid media outreach of the EC Representations and the WPP group, coherence issues may be identified in some cases.

Judging from the data available, a number of issues appear to have weakened the coherence with the EDICs activities:

- **The EDIC call.** The restricted EDIC call was launched somewhere in the second half of 2016, at a stage where the narratives and approach of Invest EU was still being finalised and where local outreach plans were still being finalised. This had, judging from the data available, a number of consequences:
 - **The scope of the call was broad.** The call, in its heading specified that “EDICs were to communicate on “EU major initiatives in favour of jobs, growth and investment, in particular the Investment Plan”.
 - Representations could choose to make a call covering actions aiming to promote the Investment Plan, actions aiming to promote other EU programmes in favour of jobs, growth and investment or a mix of both. Judging from the project compilation Representations allowed for both. In practice one in four (25%) of the retained proposals were intended to cover the Investment Plan only.
 - **Target audiences were not defined.** The call specified that the actions to be undertaken under the call related to the wider public awareness campaign towards a “broader audience”, but there was no definition of what that audience would be, or the extent to which the EDICs were to ensure outreach to specific audiences defined by the call.
 - **Expected activities were not defined.** The generic call did not specify which activities could be undertaken by the EDICs. This approach seemed suitable, given the objective to complement the implementation of the local outreach plans and the EC Representations’ own activities. This approach could also cater for the local strengths of the EDICs. In practice, however this appears to have meant that the scope of action became quite wide with some actions – such as the advertising campaigns planned by several of the Spanish EDICs – appearing to overlap with the corporate campaign overall in terms of media mix.
- **The timing of the call.** The actual launch of the call for proposals and application deadlines appeared to vary across Member States, but calls, to our understanding were undertaken and

⁴⁶ 67 EDICs received funding for specific projects. In all cases but, the Greece and Lithuania, the EDIC projects included one grant per EDIC, covering, as indicated, typically several activities. In the case of Greece and Lithuania, the EDICs received funding for more than one grant. In these cases, the grant was provided by activity, but totalling in each case a maximum of 15,000 Euros. For consistency and comparability this section presents the data by EDIC rather than by the number of grants, as the latter provide a skewed result (e.g. 21 grants were allocated in the case of Greece, but to 3 EDICs only, with a sum of EUR 37,700 – whereas nine grants to French EDICs were allocated, with a total budget of EUR 111,100)

completed by end of the second Semester 2016. This call period was coherent with the planned corporate campaign launch (i.e. the WPP lead campaign). In practice, however, the corporate campaign led by WPP was delayed, with local outreach (WPP) still being amended early 2017 and with activities only starting at Member State level by the end of first semester 2017. If the objective was to ensure maximum exposure within a limited period of time, the EDICs activities were not planned accordingly. Not less than one third of all EDIC funded projects had a planned project closure by summer (July 2017⁴⁷). In general, nearly all EDIC projects planned activities in the first semester 2017.

If a closer look is taken on campaign coherence, it is useful to distinguish between the zoom in countries, and other Member States, as timing and focus differ.

Coherence in the Zoom-in countries

45 of the 67 EDIC projects funded (67%) were in the zoom-in countries, consuming a total of 73% of the total allocated EDIC budget of 796,058 Euro. An additional 5 projects were funded in Romania (zoom in country only at later stage), with 7% of the budget envelope. Concentration of resources in the zoom in countries is coherent with the overall campaign approach. EDIC projects in the original zoom in countries were undertaken in all countries but Belgium.

In general, EDICs concentrated their activities on actions with a local physical outreach (events for the general public and for business, local authorities, academia, enterprises and youth in particular), complemented by press activities (either in the form of press outreach or/and in the form of local media collaboration), earned social media outreach, development of website content and/or publications. A clear majority of the actions are complementary to those undertaken by the WPP campaign – ensuring local physical outreach which would not have been possible with the corporate campaign.

In total some 86% of the EDIC projects funded planned to undertake local physical outreach as part of their project⁴⁸, in the form of seminars, conferences, information sessions, trainings, debates/round tables and other similar events. There are also examples of other forms of local physical outreach, such as fair participation, (travelling) exhibitions and participation in festivals. In contrast, judging from the project proposals, only three EDIC projects appear to have organised project visits for journalists as part of the implemented activities. Other frequent activities are media outreach (press events, invitations of local journalists to events organised) and to a smaller extent, media partnerships, publications, multiplication of reach via earned social media outreach, competitions, publications and/or development of website content. One in five projects also foresee the development of videos/video content.

In terms of audiences, planned actions are intended for a wide range of audiences, including in a majority of cases the general public, youth and/or students or other general public segments. However, more than half of all project proposals also mention business/SMEs and/or entrepreneurs as part of the stated target audience (for one, several or all activities). Some projects appear essentially to cater for this group (e.g. the projects of EDIC Rezekne, EDIC Lombardia, EDIC Napoli, EDIC Neuss, and EDIC Daugavpils).

If EDIC activities are mapped against those undertaken by the campaign, as led by WPP, there is, as outlined, generally a good level of complementarity, in so far that most planned EDIC actions are either physical/face to face, targeted local media or involve other actions which are not implemented by the corporate campaign (e.g. competition or development of brochures or other content presenting local funding opportunities). Several internal stakeholders have also noted that many EDIC actions have had a high level of creativity, using tools and channels in an innovative way to generate local outreach.

⁴⁷ Of the EDIC projects in the zoom in countries, also one third (34% or 19 of 56) had planned to be completed by the summer 2017

⁴⁸ As indicated most projects included more than one communication activity.

However, there are also areas where there appear to be potential duplication of efforts, insofar that similar actions are undertaken by the corporate campaign. Furthermore, some project activities potentially have a lower added value, as these activities are, or could have been, taken up by the corporate campaign, potentially with a higher degree of professionalism and/or efficiency. Examples of such projects are:

- Projects of the EDIC Madrid, the EDIC Valencia, the EDIC Lleida and the EDIC Cordoba – involving out of home advertising (videos in the metro of Madrid, visuals in Bus lines in Valencia and in Cordoba, as well as billboards also in Cordoba) and local TV advertising incl. video development (Lleida).
- The project of EDIC Valmiera involving TV advertising (including the production of all campaign material)
- The project of EDIC-Somogy County, in Hungary, which has among its core activities the development of a website, the development of publicity films about the European Investment Plan and related advertising.
- The project of the EDIC in Northern Transylvania, which foresaw as part of its core activities the development of Infographics and promotional videos and related social media promotion.
- The project of EDIC Komotini which has as core activities the creation of special website, Facebook ads promoting #InvestEU, video production and the use of paid online banners to link to the developed website.

Coherence in the Non-zoom-in countries

Overall, due to the more limited set of activities undertaken outside the zoom in countries, there are generally no significant issues with duplication of activities between EDICs and other campaign activities.

17 InvestEU EDIC projects have been funded outside of the zoom in countries (and as indicated above five in Romania). Overall, the same trends in terms of activities is seen in activities outside of the zoom in countries. Most projects (70%) planned some form of physical events and a majority of projects aimed at reaching out to the general public. However, as is the case for the EDIC projects in the zoom in countries about half of the projects target, amongst others, a business audience. Moreover, the share of projects concentrated on a business audience is higher (EDIC Limassol, EDIC Lancashire, North East England and EDIC Wrexham). One EDIC project funded advertorials in local newspapers (EDIC Lääne-Virumaa).

4.4.2 External campaign coherence

External coherence relates to the extent to which the corporate campaign, overall has been implemented in a coherent fashion with related communication actions of other actors, at EC, EU and national level.

There are a number of actors who in some sense have been working on directly related themes:

- In relation to the Investment Plan, the Commission’s SPP and the European Investment Bank (EIB) and the European Investment Fund have been actively communicating on the opportunities under the plan.
- In relation to awareness raising on EU investment and the benefits that these brings, other DGs, in particular DG REGIO, Member States and Structural Funds managing authorities are working proactively on showcasing the benefits on the ground.

The subsequent sections consider the coherence between communication actions of these parties and those of the corporate campaign.

Coherence with the just initiated DG REGIO campaign “An EU that delivers in the regions, “Communicating impact and results of Europe’s cohesion policy”, and the “#InvestEU/EU that Delivers” is treated separately as a sub-section under coherence with other DGs activities.

Coherence of #InvestEU communication activities with EC communication activities covering the investment plan (the SPP, the EIB and the EIF)

The European Commission's Spokesperson's service (SPP), the EIB and the EIF are all heavily involved in the promotion of the opportunities of the Investment Plan. As to ensure coherence in outreach, all parties are "linked" to the corporate campaign, though the organisation of monthly meetings between these key parties (as well as DG ECFIN as the policy lead). The SPP has also been closely related to the campaign design phase and has been consulted in relation to organisation of key actions for journalists and media buying.

At the corporate level the coordination of the campaign, with activities of the SPP, the EIB and the EIF is generally seen as satisfactory, albeit there is room for improvement, especially with regard to the EIB and the EIF. In this respect all actors consulted recognise that there are issues with the overlap of activities and actions. Some overlaps are seen as unavoidable, in particular in relation to press and earned social media outreach. Overlaps in practice however, are felt to be limited by the fact that different direct audiences are targeted and that, in order to be convincing, multiple touchpoints with the final audiences are necessary. Moreover, it is felt that issues of duplication are minimised through close collaboration, sharing of communication planning, and mutual use of content – especially between the corporate campaign and the SPP.

Exchange with the EIB and the EIF is generally seen to be good. However, in practice, interviewees note that there are overlaps. Overlaps especially relate to communication on the same "flagship" projects, with both the corporate campaign and the EIB engaging these as part of a project story driven approach. This leads to inefficient resource use (e.g. multiple footage shootings with the same projects), but also to the risk of overburdening the project owners.

In terms of local engagement, the EIB offices appears to have been mostly responsive to demands for involvement in activities at national/local levels (often as event speakers). Where they have been involved, their contributions are seen positively, adding value to local outreach. There are however, also occasional issues, where the Representations have desired to make the EIB a central partner to the campaign, but where the EIB has not been responsive. Also a few interviewees at Member State level have noted occasional issues with branding⁴⁹ or with parallel activities at Member State level.

In addition to the SPP, the EIB and the EIF, there are also other EC related actors involved in the promotion of the funding opportunities under the Investment Plan, including the EEN, DG GROW, DG MARE (Blue invest) and DG ECFIN (especially through funding of the ESO activities in the EC Representation's). Furthermore, all EDICs are required to communicate on the EC's political priorities, including explicitly on the Investment Plan.

Coherence with such communication efforts have not been assessed. However, it may be noted, that several DGs working on investment related issues have taken up the visual elements from the corporate campaign, ensuring both visual sustainability and visual coherence with the corporate campaign. Also, the DG REGIO campaign "*An EU that delivers in the regions - Communicating impact and results of Europe's cohesion policy*" was to use the look and feel and key claims of the corporate campaign.

Also, the DG REGIO campaign "*An EU that delivers in the regions - Communicating impact and results of Europe's cohesion policy*" planned to use the look and feel and key claims of the corporate campaign.⁵⁰

⁴⁹ with the EIB encouraging ESFI specific branding

⁵⁰ Assessing the actual coherence between the InvestEU campaign and the DG REGIO campaign was out of scope of the study; the implementation of the latter was foreseen only for the fall 2018

Coherence of #InvestEU communication activities with other EC communication activities

Actions undertaken by other DGs to communicate on results and benefits of EU funded projects

All DGs and executive agencies involved in the management of European funds, engage in some level of proactive outreach, aiming to showcase project stories though earned, owned and/or shared media channels (e.g. EASME, DG REGIO, ERCEA, DG ENV, DG EMPL, DG RTD, DG AGRI and DG MARE). Moreover, all EU funded projects are required to undertake a minimum level of information and/or dissemination actions.

In the context of a coherence assessment with the #InvestEU campaign, however, most of these initiatives are seemingly of secondary importance, because of the scale and/or the intended target audiences (often potential beneficiaries of funds, users of project results and/or policy makers). Moreover, DGs have been heavily involved in the project selection for the story telling in the context of the #InvestEU campaign ensuring that projects with local relevance and high story telling potential have been included in the campaign. An additional side effect of this involvement appears to be the awareness of the corporate campaign, and the need to speak with one voice.

Judging by the interview feedback, the main potential areas of overlap with communication activities of other DGs, lie with the communication work undertaken by DG REGIO and/or communication undertaken by Managing Authorities of the Structural Funds (usually in the framework of communication actions or campaigns led by DG REGIO). Of the 14 original zoom countries, potential or actual coherence issues with DG REGIO-led activities were explicitly mentioned in four (DE, AT, NL, PT).

DG REGIO has for a number of years been involved in communicating projects and results of ERDF funded projects. Their activities are supported by the Managing Authorities, which are required under Regulation No 1303/2013⁵¹ to draw up communication strategies, publish to Union citizens the role and achievements of cohesion policy and designate information and communication officers to coordinate information and communication actions in relation to the structural funds (participating to the so-called INFORM network coordinated by DG REGIO which also organises annual INFORM network meetings).

Supported by the conclusions of the meeting of the European Council⁵² stating that Member States and the Commission need to scale up their efforts to increase the visibility of cohesion policy, DG REGIO has in recent years been stepping up their communication efforts, to reach out to European citizens. In May 2017, EU Commissioner for Regional Policy Corina Crețu presented a set of seven actions⁵³ to step up communication efforts toward the wider public⁵⁴.

Main campaigns of DG REGIO during the implementation of the #InvestEU campaign (i.e. from January 2017 until June 2018) have been:

- **EU in My Region campaign** (2017 and 2018 - around 9 May), a recurrent annual campaign concentrated mainly during the month of May, involving, among other, project visits/project open doors, a photo contest, a blog contest and a quiz with prizes – and the development of a toolkit

⁵¹ Regulation EU1303/2013 of the EU parliament and the council of December 2013 laying down common provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime and Fisheries Fund and laying down general provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund and the European Maritime and Fisheries Fund and repealing Council Regulation (EC) No 1083/2006

⁵² Council conclusions on "Making Cohesion Policy more effective, relevant and visible to our citizens" April 2017 http://ec.europa.eu/regional_policy/sources/newsroom/pdf/gac_25042017_conclusions.pdf

⁵³ Bringing opportunities to Europeans: communicating together the results of EU cohesion policy

⁵⁴ Action 1: the Cohesion Alliance, Action 2: The video competitions; Action 3: The "Did you know?" campaign, Action 4: Photo exhibitions, Action 5: National versions of the RegioStars awards; Action 6: Activity organised in the framework of the 60th anniversary of the EU and Action 7: Organising local/regional debates about cohesion policy.

intended mainly for project holders and Management Authorities (campaign video, posters, social media visuals and guidance material).

- **The 30 years of EU cohesion policy** (spring 2018) celebrating EU cohesion policy's 30th anniversary. As a part of the campaign DG REGIO organised events and exhibitions around 30 years cohesion policy.
- **The Road trip project** (2018 spring-summer), an initiative to engage with young audiences.⁵⁵

DG REGIO campaigns implemented in the period of the #InvestEU campaign subject to evaluation are typically small in budgetary terms (e.g. Europe in my Region, the largest campaign has an EU budget of about €100,000⁵⁶). As such they are in financial terms marginal, compared to #InvestEU. Moreover, campaigns are increasingly visually aligned (with the EU in my region 2018, using the “investment in ... starts here” line⁵⁷).

However, while DG REGIO provides key content⁵⁸ and/or impetus for action, the INFORM network and project holders play a key role in the multiplication and outreach of the actions adding to the EC's own campaign resources. In view of the large share of ERDF projects selected as Flagship projects, this obviously creates risks of duplication, as perceived in some zoom-in countries.

Furthermore, the close involvement of the Management Authorities/INFORM network in the DG REGIO campaigns – but also in the actions under the plan “Bringing opportunities to Europeans: communicating together the results of EU cohesion policy”⁵⁹ - raises the question of the extent to which resources were optimally used, activities coordinated, and the Managing Authorities adequately involved with the #InvestEU campaign, as to maximise impact. Overall, judging by the interview results, there appears to be scope for improved coordination but also alignment of the federating messages/tag lines.

Coherence with communication actions by Member States

Judging from the feedback collected, – with the notable exception of Hungary – there has not been any significant Member State led campaigns undertaken, targeting the wider public and aiming to promote European funded project results, showcasing their benefits, in any of the zoom in countries. Outside the zoom in countries, a campaign on EU Funds on TV took place in Croatia last year⁶⁰.

A clear majority of the interviewees were not aware of any activity of a similar nature at Member State level. When interviewees were aware of communication actions from the national authorities, they generally mentioned actions aimed at generating awareness of funding opportunities. In the case of Poland and Portugal also, the government was seen to have been spreading messages about EU funding and the value of these investments. Spanish Regions were also seen as active in this regard. Additionally, government in a few zoom-in countries were seen to promote funds and benefits – but the scope was seen to be primarily on agricultural funds (Italy, Latvia).

⁵⁵ The Road Trip Project" is an n initiative to engage with young audiences (18-24 years) through a series of road trip experiences on 4 European routes (Baltic, Danube, Mediterranean and Atlantic). Participants experience first-hand what the EU is about and what's in it for them, and they will share their adventures with their peers on social media. Local influencers will join them for short periods to introduce them to their favourite spots and people, while promoting the Road Trip towards their communities. Around 40 visits to inspiring EU co-funded projects are part of the journey.

⁵⁶ This budget covers EC led activities. Activities at national level are undertaken by the Managing Authorities, which also funds these. The estimated cost of about 100,000 Euros is provided by DG REGIO. Details on budgetary costs are not available.

⁵⁷ With however “#EU in my Region” as main reference, and campaign distinct visuals

⁵⁸ e.g. toolkit, videos and posters

⁵⁹ See European Commission (2018), Progress report Implementation of the seven joint communication actions at http://ec.europa.eu/regional_policy/sources/informing/20180412_progress_report.pdf

⁶⁰ The campaign related to Structural Funds. Detail on the campaign is not available, but it is likely that the campaign has been undertaken by the Structural funds Managing Authorities.

In view of the typically more (or much more) limited level of activity of national authorities, and the type of activities undertaken, interviewees did not generally perceive that there were any significant issues with overlaps between the campaign and the communication of the national authorities.

In the cases of Portugal and Hungary – where national authorities have been more active – the focus from national authorities is seen more to be promoting project benefits, without (adequate) reference to the EU funding element. As such, the corporate campaign message can be seen to be complementary, insofar that it highlights the EU origin of the benefits achieved on the ground. However, given the size of the Hungarian campaign⁶¹ run by the national authority in 2016-2017 (which had the explicit purpose to promote benefits on the ground of projects which in practice were EU funded) there appears to be an overlap⁶².

4.5 EU added value of the campaign

The section focuses on the additional value resulting from corporate communication activities at EU level, compared to what could be achieved by Member States at national/regional levels.

To address this evaluation question adequately, three sub-questions/issues are considered:

- Added value of the corporate campaign approach, compared to what could be achieved with a **fully decentralised** EC Representation managed communication campaign (Section 4.5.1)
- Added value of the corporate campaign, **in view of the Member States activities** to communicate on EU investment and their benefits at national and regional level and compared to what could have been achieved with a **Member State leading** the communication initiative (Section 4.5.2)

4.5.1 Centralised versus national campaigns

A fully decentralised communication campaign managed by the EC Representation

The approach used by #InvestEU, combining one overarching campaign strategy, with a federating message with a decentralised implementation approach managed by the Representations is seen by all stakeholders as a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC. In this context all stakeholders highlighted that an effective EC campaign needs local tailoring of messages, content and channels to the concerns and interests of the targeted population. None of the stakeholders consulted considered that a more centralised campaign would generate better results.

In contrast, there is no consensus among interviewees regarding the relative additional value resulting from corporate communication activities implemented as the #InvestEU campaign relative to what could be achieved had the campaign been implemented in the form of national campaigns – designed, led and implemented by the EC Representations.

Some interviewees felt, that national campaigns would allow for full tailoring of campaigns to the national context (messages, templates, channels and content) and freedom for the EC Representations to choose the best local providers. As such, national EC Representation led campaigns were seen to have the potential to generate better results. These interviewees generally encouraged the implementation of national campaigns, or at least a "lighter touch" corporate elements - with the representations having full flexibility to design local campaigns.

Other interviewees felt that the decentralised approach used by the #InvestEU campaign, had comparative benefits, for example in terms of internal stakeholder engagement (i.e. involvement of other DGs), costs (e.g. by the provision of common adaptable visuals), or in terms of generating cross-

⁶¹ According to the interviewees €4 Million, spend of project promotion covering 4 projects (TV advertising based)

⁶² Especially if the national campaign was (co-) funded with structural funds allocations.

border visibility. These interviewees were also more likely to consider that the decentralised approach had worked well in practice.

Beyond stakeholders' viewpoints, it is however, also important to consider other aspects - notably the effectiveness of the localisation approach, potential benefits or drawbacks for project holders, and other multipliers engaged by the campaign, the capacity of EC Representations, and management of resource inputs needed for the campaign and other aspects.

These relative advantages of the corporate campaign approach vs. national EC Representation-led campaigns are presented in a headline fashion in Table 13, below. Advantages are listed together with the identified weaknesses of the corporate communication approach, which would have the potential to be better addressed through national campaigns designed and implemented directly by the EC Representations.

The table does not consider aspects of the campaign that are seen to have added value compared to previous EC campaigns (e.g. local tailoring, showcasing with concrete examples what the EU does “on the ground”, involvement of youtubers and bloggers and project promoters), but also could be delivered with a national campaign.

Table 13 Added value and shortcomings of the corporate communication approach used in #InvestEU

| | Additional value resulting from corporate communication | Shortcomings of corporate communication (which possibly could be addressed by national communication) |
|--------------------------|--|--|
| Competence division | <ul style="list-style-type: none"> • Technical competences and expertise (strategic planning, media buying) concentrated at corporate/EU level – to support campaign implementation across the zoom-in countries (supporting professionalisation which would be more challenging to develop at REP level). • Centralised resources (human and money) provided are important especially for smaller Member states/REPs with limited resources at their local representation and EDIC network • Resources at Representation level concentrated on local outreach, as opposed to activities which do not necessary require local insight (contracting, media buying). • Not all REPs are necessary equivalent committed or may have wished to steer the campaign in different directions. The EC overlayer provides second level quality assurance. | <ul style="list-style-type: none"> • Single contracting with one contractor, means that a package of local contractors is bought in. the quality of local contactors differs. Local buying could ensure better contracting quality. • High administrative/management costs, due to the involvement of multiple actors – and several levels of coordination and quality assurance (both within the EC and between the different contractors within the WPP consortium). |
| Delivery and outcomes | <ul style="list-style-type: none"> • Common goals and centralised set of KPI against which the campaign results and outcomes can be measured (i.e. generating results across the EU) • Delivery of content for MS which are not zoom in countries • Delivery of one common set of templates and toolkit for the campaign – for the benefits of all actors involved (implying potentially lower costs) | <ul style="list-style-type: none"> • Campaign approach not necessarily relevant to all MS (e.g. social media outreach in the NL) leading to inefficiencies and potentially lower levels of effectiveness. • Visuals may have different levels of attractiveness across MS |
| Storytelling and content | <ul style="list-style-type: none"> • “centralising” and “harmonising” role: one logo, one hash tag, one message – ensuring overall coherence. • Possibility to collect best possible stories across all funding channels of the EC – allows the | <ul style="list-style-type: none"> • Content not always optimally tailored to local concerns and issues. Insufficient flexibility to target specific local groups. • Slogans translated rather than developed in local languages, leading to sub-optimal content (e.g. |

| | Additional value resulting from corporate communication | Shortcomings of corporate communication (which possibly could be addressed by national communication) |
|-------------------------------------|---|--|
| | <p>identification of interesting projects, which could otherwise be left unnoticed</p> <ul style="list-style-type: none"> • Overarching narrative with a federating message. Broken down into local messages and content to ensure relevance • Opportunities to ensure consistency in content across countries, incl. disregarding irrelevant content or activities which may not support the campaign objectives or the storytelling approach • Topics are seen as transnational – so a transnational campaign is seen to make sense. Where “jobs” has been less relevant, there has been opportunities to tailor content | <p>Kansen beginnen hier (NL) or Muligheden starter her (DK)</p> <ul style="list-style-type: none"> • Overarching topics not necessarily relevant in a country context (e.g. job creation was not seen as salient in PL, NL and DE) |
| Stakeholder and partner involvement | <p>Involvement of all DGs (and EAs) of the EC – ensuring that they become partners to the campaign.</p> <p>Opportunities to provide report to all internal stakeholders in a digestible format (supporting continued commitment)</p> <ul style="list-style-type: none"> • Actions of other DGs can be expected to take account of the corporate campaigns – leading to greater consistency and possibly fewer inadequately funded campaigns of individual DGs • For some projects and partners International recognition/visibility (EU wide campaign) brings added value to local projects funded – implying potentially more engagement or willingness to participate. Likewise, a few interviewees highlighted importance of the EU “wow effect” (i.e. being part of a campaign implemented across Member States) for the involvement of local bloggers/youtubers and other influencers. | <ul style="list-style-type: none"> • Sub-optimal involvement of local partners in some MS (e.g. NCPs, MS authorities) • Some REPs did not feel that they were in the “driving seat” |
| Other | <ul style="list-style-type: none"> • Combining EU and local outreach – creating a “campaign momentum” • Common framework for implementation, Opportunities to lean from and build on best practice from MS (and more in general exchange of experience). • Opportunities for cross national communication and actions (e.g. press trips showcasing that there are lot of common challenges across MS or showcasing what is going on in other MS) • Visibility across MS, international outlook and sense of unity and closeness beyond the boundaries of the MS • Cross-border recognition/ repeat recognition) | <ul style="list-style-type: none"> • Several interviewees noted that a corporate campaign covering several Member States at the same does not add value as it is unlikely that citizens will see the campaign in another Member State. However, a few flagship projects noted that they were positively surprised about the feedback that “their” campaign videos received outside their country. |

Source: interview results

4.5.2 EC centralised versus national ‘independent’ campaigns

In view of Member States activities

As outlined in the previous section, there is nothing to suggest that most Member States are involved in, and funds, substantive proactive campaigns raising awareness of EU investments and/or showcasing benefits of EU funded projects. There are two exceptions: one in the zoom-in country Hungary and one in Croatia. Moreover, some Member State governments in zoom-in countries (Portugal, Poland) and regional authorities (Spain), have taken more proactive approaches to communicating on the benefits of EU funds, without undertaking larger scale campaigns.

Member State authorities in the remaining zoom-in countries are reported to be rather reactive – especially as regards promotion of the results of EU funded projects. Here, proactive approaches of national authorities appear to be related to generating awareness of EU opportunities among potential beneficiaries – but not among citizens at large. In some Member States the main national authorities involved in showcasing benefits of EU funding are the Managing Authorities of the ERDF – often in the framework of DG REGIO-led initiatives.

Judging by the data collected, the #InvestEU campaign has added value across all zoom in countries - compared to the activities already undertaken by regional and national authorities – by:

- **Generating awareness of the benefits of EU funded projects on the ground.** As outlined, few Member States promoted such benefits at a large scale, with the campaign thus addressing an “awareness gap” of the benefits of EU funding⁶³.
- **Highlighting the EU’s contributions to the benefits generated.** While some Member State campaigns and larger scale communication actions in the zoom-in countries have been identified, these campaigns tended not to highlight the importance of EU funding to achieve the stated benefits. The InvestEU campaign has thus been adding value to these Member States actions – by showcasing the importance of the EU.

Given the much smaller scale of activities outside the zoom in countries, benefits are comparably smaller.

The campaign appears in no cases to have crowded out communication activities of national actors. On the contrary, several interviewees noted the involvement of national, regional or local agencies or politicians in campaign activities and/or in spreading the message of the campaign (e.g. Cyprus, Romania, Spain, and partly in Hungary). A few interviewees also noted that these appeared to have become more proactive in their communication approach during campaign implementation – suggesting a potential positive spill over effect (interviewees in Finland and Sweden). Some Representations, however, noted that the campaign would have benefitted from stronger involvement from the national authorities (Italy, Malta, France⁶⁴).

A Member State leading

There is no comparative data which will allow an assessment of the extent to which Member States (in partnership with the EC) could implement more effective or efficient campaigns with the same resources as those available for the corporate campaign.

⁶³ As outlined in section 4.2.1.2, the campaign does not appear to have improved awareness of EU funding. In contrast, there is measurable evidence that those having seen the campaign are likely to be more positive toward EU investments.

⁶⁴ BPI and Pole d’emploi however, were actively involved in the campaign

However, the evaluation⁶⁵ of the past EC initiative “the Managing Partnerships”⁶⁶ and the data collected in the framework of this study, suggest that comparative benefits of Member State led campaigns are likely to be small and, relatively, there are some comparable benefits of an EC lead campaign.

Benefits of the corporate campaign approach are seen to relate especially to the possibility to design clear and coherent EU messages⁶⁷, a coherent but tailored set of channels across Member States and the definition of specific outputs, results and outcomes across the campaign, against which progress can be measured. Some interviewees felt that a nationally run campaign would lose the “EU message” and some pointed out that national communication on EU projects tended to become politicised. A few interviewees also highlighted that the EU enjoys greater trust than national institutions and politicians (although this obviously vary significantly across Member States⁶⁸).

The Managing Partnerships evaluation displayed the challenges of a Member State managed approach. While the partnerships were particularly useful in creating dialogue between the EC Representations and the Member State, their impacts in terms of increased knowledge appear to have varied significantly, as did the nature of activities – following from the full freedom each partnership had to identify the target audience, the channels, tools and approached used on the ground. While this was reported to ensure relevance on the ground, it did not necessary imply that that the most effective or efficient channels were used. Additional challenges stemmed from lack of monitoring and evaluative data – including comparative data across partnerships. As a result – although each of the partnerships were subject to specific evaluations - conclusions regarding both effectiveness and cost efficiency were not possible to draw.

Additional findings from the “the Managing Partnerships” evaluation also showed that:

- Management burden remains significant also under national EU/EC Representation managed communication (albeit is likely to be smaller than that of the InvestEU campaign)
- Grant funding to Member States does not necessarily generate national “top up” of campaign funding even when anticipated⁶⁹. In contrast, the evaluation did show some indirect benefits, ranging from preferential access to TV airtime to support from civil society which stemmed from the Member State involvement (and lead).

For these, and the above-mentioned reasons, it is questionable that Member State led campaigns would generate better results.

⁶⁵ Deloitte (2014) Horizontal Evaluation of Management Partnerships, for DG COMM at <http://ec.europa.eu/smart-regulation/evaluation/search/download.do?documentId=10529698>

⁶⁶ Management Partnerships were deployed as a tool for cooperation on communication activities between the European Commission, the European Parliament and the Member States. Management Partnerships bound the partners together closely as the Management Partnership’s communication activities were agreed jointly in a single Communication Plan with earmarked funding and delegation of financial management to the Member State. The Communication Plan translated the Interinstitutional priorities into activities which, in the combined view of the coordination team of the Representation, the European Parliament Information Office and the Member State, best reached the target groups with the greatest needs for information on the EU at national level. The Member States were responsible for implementation of the activities and therefore for managing the funds. It was intended that Member States were to contribute with funds in addition to grant funding provided by the EC, this in practice did not happen. As a result funding for most activities came only from the Commission. Belgium was the only country where the national contribution was fully integrated into the Management Partnership. The budget allocation in 2012 (latest year) was EUR 8.2 million, covering management partnerships in 18 Members States (Germany ,Austria, Belgium, Estonia, Finland, France, Greece, Hungary, Italy, Latvia, Lithuania, Malta, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden)

⁶⁷ As opposed to nationally centred messages – and the risk that communication becomes politicized

⁶⁸ See for example Special Eurobarometer 461 (2017) Designing Europe’s future: Trust in institutions Globalisation Support for the euro, opinions about free trade and solidarity

⁶⁹ It was intended that Member States were to contribute with funds in addition to grant funding provided by the EC, this in practice did not happen. As a result funding for most activities came only from the Commission. Belgium was the only country where the national contribution was fully integrated into the Management Partnership

4.6 Sustainability of the campaign

The section addresses the questions: “Are the effects of the InvestEU communication actions likely to last after the communication interventions end? To what extent the issues addressed by the communication activities require continuous communication effort?”

We focus on the sustainability of the messages conveyed, in terms of reach, recall and engagement over time (Section 4.6.1) and the sustainability of the effects on the external stakeholders (Section 4.6.2).

4.6.1 Sustainability of the message in terms of reach and recall and engagement over time

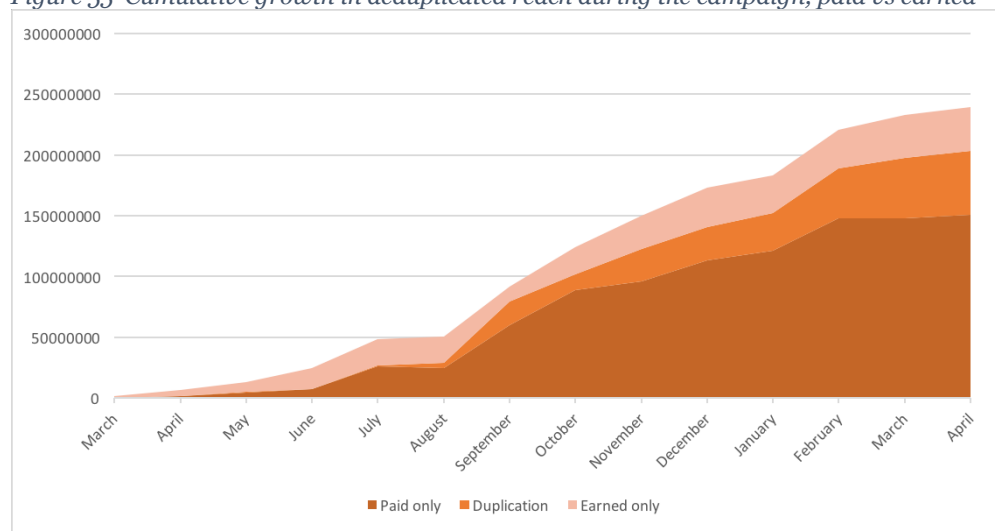
Campaign spending has lower additional impact over time as reach tends to plateau

The campaign included paid and earned communication activities. As shown in the figure below, the first boost in the campaign reach in June and July 2017 was due to the first paid media activities. The total potential reach of the campaign also received a boost in September, as various paid social media and digital advertising campaigns kicked off, and again in February, with the addition of InvestEU campaigns in two new countries (Romania and Sweden), but after each of these initial boosts the rate of increase declined. The reach for each channel tended to flatten out as the campaign progressed.

Since the deduplication calculation takes into account the probability of an individual being exposed to the campaign more than once, the number of people potentially reached tends to plateau for each channel and for each country as the campaign progresses. Each new exposure of the campaign has a growing likelihood of reaching someone who has already been exposed to the campaign. This **plateau effect** holds true for reach of both paid channels and earned channels (see chart below).

In fact, looking at each month individually, the potential reach generated during October or March was even higher than that generated in September and February, but the difference they made to the total decumulated potential reach is smaller, since **for each new wave of advertising there is a growing probability it is reaching individuals who have already been reached by previous waves.**

Figure 55 Cumulative growth in deduplicated reach during the campaign, paid vs earned



Source: Technopolis analysis, based on WPP KPI data May 2018

In terms of reach alone, therefore, additional campaign spending tends to have a reduced additional effect as the campaign goes on. The effect is particularly strong for additional spending within a particular channel directed towards a particular target audience (for example, social media users in a specific country).

Main campaign effects, in terms of recall and perception, linked to first half of the campaign period

We note that nearly all the change in recall and positive awareness, as measured by Kantar Public's polling, occurred during the period between the baseline and interim polls. Very little change can be found between interim and final poll. Negative perceptions dropped off to a larger extent. Thus, the impact of the campaign can mainly be associated to the first waves, while **very little additional effect can be seen from continued campaigning.**

The Kantar interim poll, conducted after six months of the campaign in October-November 2017, found that spontaneous specific recall ("have you seen, heard or read adverts, publicity or other types of information in the last couple of months which focused on the EU and investment?") was around 43%, while prompted recall ("have you seen any of these ads/videos in the last couple of months?") was around 30%. The final Kantar poll, conducted five months later in March-April 2018, found that spontaneous specific recall was around 42%, while prompted recall was still around 30%.

Equally, for measures of positive perception or awareness change, Kantar's polling asked respondents whether they agreed with statements such as "the EU helps create economic growth in my region", or "EU funded projects create benefits for my region". Most of these measures grew by between 3 and 5% during the period between the baseline poll and the interim poll. But during the period between the interim poll and the final poll they changed very little, even declining by half a percentage point on average.

Thus, overall, it appears that the second campaign period had very little effect in comparison to the first. The biggest effect appears to have been for recall of the campaign signature, which grew from 17% in the interim poll to 19% in the final.

In terms of recall and perception change, therefore, additional campaign spending also seems to have a reduced additional effect as the campaign goes on.

Recall is fading over time

Recall is somewhat related to the reach of both paid and earned channels. The Ipsos Mori final poll took place in May/June 2018. The results show that about 10% of surveyed individuals remember the social media ad or poster/print ad shown. However, when testing if they had seen the ad or a similar ad, 26% said they did. This share is close to the one found through the Kantar poll (29%), but lower.

One reason the recall is lower in the Ipsos Mori poll may be that fewer examples were displayed to the public – and the ads shown in the Kantar poll were more targeted regionally to the respondents. But another potential explanation is that the Ipsos Mori survey took place two months later than the Kantar poll which may indicate that the public did not remember the content anymore. This means that potentially, the memory of the campaign faded away between the two tests.

Academics have proposed that consumers are devoting less attention to ads than they used to, along with many explanations as to why: ad clutter (consumers are exposed to too many ads nowadays), distrust (consumers have lost faith in the truthfulness of ad messages), short attention span (consumers don't have the ability or motivation to attend to long ads), media proliferation (consumers have more channels from which to choose), and less need for information from advertising (consumers can easily obtain information they may be interested in by searching for it themselves online)⁷⁰.

Further research examining online advertising indicates that attention to an ad is affected by ad type (pictorial vs. text) and the interaction between ad location (left vs. right) and page (image-oriented vs. textual). The researchers suggest that a range of factors impact attention and a clear "hierarchy of

⁷⁰ *The Rising Cost of Consumer Attention: Why You Should Care, and What You Can Do about It*, Thales S. Teixeira, Harvard Business School https://www.hbs.edu/faculty/Publication%20Files/14-055_2ef21e7e-7529-4864-bofo-c64e4169e17f.pdf

effects” appears to be elusive. However, they confirm that campaigns must fully evaluate the objectives of their advertising prior to creative development⁷¹.

In other words, where the objective is recall, this might have different implications for the type of advertising materials to be developed (as well as choice of channels) than if the objective is engagement with the ad, or longer-term perception change or increased awareness of specific information.

One paper conceptualises the role of memory as “delayed forgetting” and, in an empirical study based on Peugeot car advertising, estimated the memorability of such ads to be on the order of a few weeks⁷². Their model suggests that ads are retained well for a short period and then decline rapidly (as opposed to the idea that recall of ads declines at a steady rate from the moment of seeing them). They also reference a previous study which found that advertising in the milk industry continued to have an effect on sales up to a year after it had ended.

While the exact period for which memory is retained may differ according to the content and nature of the advertising, this model somewhat fits the evidence in relation to the campaign. If visual and video content is retained well for a period of weeks, before tailing off, it explains why recall and other effects remain relatively constant during the campaign, as each advertising wave is seen and retained for a period, and then started to decline a few months later.

In terms of longer-term recall and perception change, therefore, additional campaign spending could have an increased additional effect if it takes place after a long-enough period of time that the previous wave of exposure to the campaign has started to decline in people’s memories.

Recall/Awareness in regard to specific topics

The awareness change of the public was assessed with Kantar Public polls of February-March 2017 (baseline), October-November 2017 (interim) and March-April 2018 (final). There was a positive awareness change, in the final and interim polls relative to the baseline, for all EU investment funds except for the Investment Plan for Europe (see Figure 56). The decrease in awareness of the Investment Plan was mostly due to decreases in Hungary (-9), France (-7) and Spain (-6).

On the other hand, awareness of the Investment Plan increased in Greece (+7), Bulgaria (+4) and Portugal (+3)– net beneficiaries of the EU budget, who might be more focused on the Investment Plan – and there was no real change in Austria, Belgium, Germany and the Netherlands – all net contributors to the EU budget and hence possibly less interested.

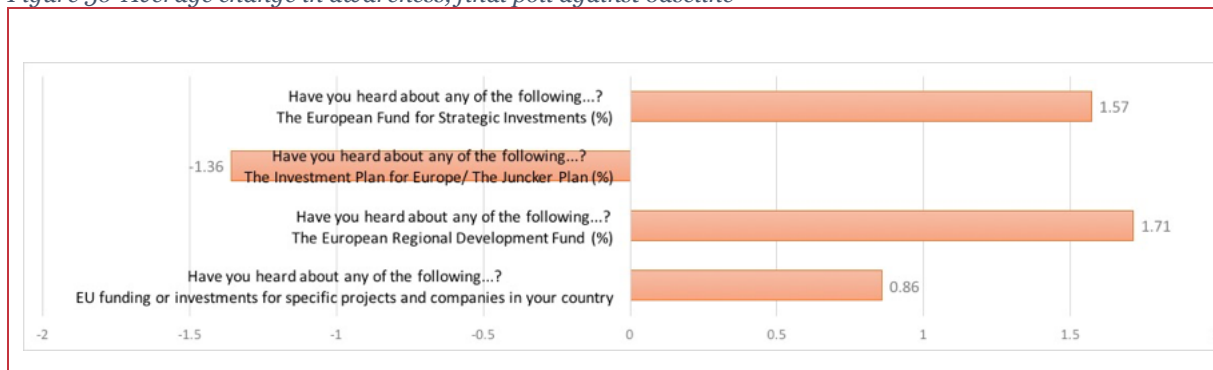
⁷¹ Anarchy of Effects? Exploring Attention to Online Advertising and Multiple Outcomes, Kendall Goodrich, *Psychology & Marketing*, Vol. 28(4): 417–440 (April 2011)

https://www.researchgate.net/profile/Kendall_Goodrich/publication/230537668_Anarchy_of_Effects_Exploring_Attention_to_Online_Advertising_and_Multiple_Outcomes/links/5bb2258c45851574f7f40efc/Anarchy-of-Effects-Exploring-Attention-to-Online-Advertising-and-Multiple-Outcomes.pdf

⁷² *How does awareness evolve when advertising stops? The role of memory:*

https://www.researchgate.net/publication/227118090_How_does_awareness_evolve_when_advertising_stops_The_role_of_memory

Figure 56 Average change in awareness, final poll against baseline



Source: Technopolis analysis, based on Kantar Polling data March-April 2018

The Investment Plan was launched with high visibility in late 2014 but was not in the end a focus of the InvestEU campaign. Whereas the other awareness questions (such as “EU funding for specific projects”) saw a positive shift during the campaign, the awareness of the Investment Plan has declined. This indicates that even a policy launched with a high profile can decline in public awareness if it is not the focus of communications (and a campaign). In turn, this is an indication that the awareness effects of the campaign, just as the recall effects, are likely to fade once the campaign has ended, unless periodically renewed by new phases of communication.

4.6.2 Sustainability of effects on external stakeholders

The #InvestEU campaign developed a narrative based on evidences of EU providing tangible benefits and delivering on its commitments for citizens. In line with the corporate strategy developing a thread of three comprehensive narratives (EU that delivers, empowers and protects), the #InvestEU campaign message is meant to be sustained over time.

Sustainability of the project and materials of the campaign

The versatile list of flagship projects used for storytelling and the processes of selection defining a clear set of criteria to enhance relevance and effectiveness can be seen as a common ground for future communication activities. Interviews conducted with various DGs highly involved in the selection of projects emphasised their potential use in the future. DG REGIO for instance has already shared centrally the compiled list of projects they identified. Upon this base, they are able to showcase good projects they can build on, with high quality materials and descriptions, as well as example of communication treatments and coverage. The final outcome on flagship projects for DG REGIO could be embodied in the publication of a leaflet showcasing identified projects and project fiches.

When looking at the sustainability of materials produced for the #InvestEU campaign, we can observe rather mixed-results in terms of sustainability. They were seen as rather valuable for internal stakeholders, especially among DGs, EC Representations and EDICs. For example, DG REGIO reported also that the INFORM network of communication officers was provided with the different templates and encouraged to use and disseminate them. The templates developed allowed to address their communication needs, while saving resources and without requiring too heavy IT skills.

A number of journalists interviewed, however, mentioned the lack of sustainability of the press trips. They considered the press trips a good idea to spread the message but regretted there was no further follow up after them. Some suggested that the communication agency should have gotten back to them from time to time with new success stories or materials to write more on the topic. Motivating journalists to write about the campaign did not require a new press trip, just some more material. Additionally, they believed that in order to help the message to get to the citizens it is important that these actions happen continuously over a period of time, there will be no reach the desired impact if they are a one-time action.

One journalist explained in detail his thoughts: “The problem was not the message and its content, the problem is the lack of continuity. One of the objectives of the campaign was to reach out to citizens and inform them about what the EU can do, the message can only be consolidated if it is spread continuously, absences of information in media for long period hinders the sustainability of the message. One concrete example of how this could be tackled: I was contacted by EC services and the communication agency to be involved in this campaign, and I undertook this task. From that moment, they have my contact and they know me personally. It could have been very easy for them to provide me with some information (of success stories for example) from time to time so that we continue sharing the messages of the campaign. And they could do this also with the whole network of journalists that they built.”

Sustainability of collaboration and coordination processes implemented during the campaign

The #InvestEU campaign as an innovative and singular campaign in the portfolio of activities of DG COMM paved the way to numerous internal processes and new strategic thinking, to the benefit in a first instance for the continuation of the #InvestEU campaign in its second phase as well as for the two other corporate campaigns that are currently running.

In terms of strategy, the communication strategy for 2017-2020 adopted by DG REGIO seeks complementarity with the Commission’s corporate campaigns with an important focus on storytelling. This complementarity is embodied by “An EU that delivers in the regions” campaign terms of references. This next campaign steered by DG REGIO will complement the ongoing #InvestEU corporate campaign, especially by informing and showcasing impacts to raise awareness of citizens. It will represent an extra mile of the corporate communication, going even more local.

Aligned with the practices of coordination and collaborations designed for the campaign, a wider sustainable effect lies also on the enhanced collaboration within the DGs. It was mentioned during the interviews that the communication unit is now much more closely involved with the DGs who benefit from new practices like storytelling in their own communication activity. Some partners also continued to promote the #InvestEU message within their own networks even after the campaign had ended and at their own expense. This is the case of the European Investment Bank (EIB) and other national banking associations that carried on the work done together with the REP and continued to spread the #InvestEU message within their organisation, training the employees and educating the clients

Contacts, networks and increased visibility of their activity

The interviews conducted with the campaign’ stakeholders revealed that most of the stakeholders involved gained visibility throughout the #InvestEU campaign. This increasing visibility allowed them to develop new contacts for their activities. In this regard, the REPs developed their network for future communication activities, and enhanced their collaboration with previous contacts and partners. Moreover, working with the local contractor WPP, and implementing their local market plan also allowed them to build contact with influencers and multipliers relevant to reach specific target audiences that they were not able to reach before the campaign.

WPP local introduced the use of influencers and opinion leaders to relaunch the #InvestEU message across their networks. The influencers identified were charismatic people, able to drive a change in behaviour among their followers; for example, they were entrepreneurs committed to political or social causes, collaborating with local authorities or NGOs, with a sphere of influence encompassing youth communities interested in innovation, business start-ups, and entrepreneurship. This kind of micro-targeting was in alignment with the aim of the corporate campaign to target populations with either positive or ambivalent (but not negative attitudes) about the EU. This use of non-traditional social networks to disseminate EU messages succeeded in generating curiosity and attention. This can be seen in the example of the flagship project (under the Juncker investment plan) on which influencers had concentrated the most: it became one of the better known projects and attracted most online visits. One of the methodologies used to achieve this was to send out social media posts inviting followers to take part, either in person or in streaming, in live events organised all over the territory by the EDICs

5 Conclusions and recommendations

In this concluding chapter we first draw our conclusions and formulate recommendations for each evaluation criterion. In Section 5.2, we summarise these conclusions for the campaign overall and provide our key recommendations.

5.1 Related to the evaluation criteria

5.1.1 Relevance

How relevant were the communication activities to the EU citizens, EU businesses and to the Commission's stakeholders?

Conclusions

The approach used by #InvestEU, combining one overarching campaign strategy, with a federating message with a decentralised implementation approach managed by the Representations is by all stakeholders seen as a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC. The decentralised approach maximised the use of existing owned (EC) channels, available resources and local knowledge to implement owned communication tools and PR activities, while buying in a 'communication action'. The general opinion of the interviewees in this study was that through its tailored approach and focus on the human aspect and the concrete benefits for the EU citizens, the #InvestEU campaign marked a breakthrough and highly appreciated shift in the EU communication to the citizens.

There was a significant amount of preparatory work undertaken in order to develop the correct approach and evidence of the appropriate use of existing data (Eurobarometer for example) as well as the results of the pilot in order to understand the needs / main concerns of the Member States. This is well thought through and the best possible approach to this kind of campaign. Involving the REPs not just in the delivery, but also the design was crucial for this type of campaign and a central element in increasing the success. The overall design phase of the campaign augmented the relevance of the choices made in terms of target audience, topics of interest and media approaches. However, the focus groups organised in zoom-in countries as part of this evaluation showed some issues with respect to the **quality** of some of the paid advertising materials once the approach was operationalised. In general, participants expressed a preference for materials based on human success stories, which facilitated connection with the audience. In addition, they tended to be more positive about materials with themes linked to topical issues and responded well to more emotional issues, whether of national importance or benefitting the local community.

The evaluation highlights the importance of understanding and tailoring to the national context and the preferences of the target audience in order to shape the activities, and the communication mix. This only increased the relevance of the approach of the campaign in each of the Member States involved, even though there are a number of outliers.

A general conclusion is therefore that the overall relevance of approach was high. The tailoring of the project-based narratives to the national contexts allowed for a very good alignment of the national campaigns with the citizens' concerns, especially in the case of the flagship projects. In relation to the campaign materials, the importance of personal success stories and materials with themes linked to topical issues was emphasised, next to a general preference towards videos over posters.

The mixed-media model underpinning the corporate campaign was up to the industry quality standards. In terms of the (paid) media channels used compared to the preferred sources for information in the countries (on EU matters and/or on EU investments), an optimal alignment is visible in the use of the written press. There was, however, an over-emphasis on the social media (to the expense of the digital media), possibly due to the important role that was attributed to the social media in order to allow for a micro-targeting of the campaign. Issues from this perspective are apparent especially for the campaigns in Italy, Finland, Belgium and France.

Recommendations

We recommend,

- To encourage future campaigns to take a **similar approach to campaign design and implementation**, based upon extensive pre-campaign preparatory work and the knowledge of the REPs and local contractors combined with the insights of the EC DGs and/or other internal and external stakeholders
- To further **improve the tailoring of the campaign narratives** to the national context. Specifically, we recommend:
 - To optimise the campaign materials through a pre-testing of messages and mediums throughout the campaign by means of focus groups
 - To introduce specific feedback loops to the campaign deliverer who can adjust activities accordingly

5.1.2 Effectiveness

What was achieved? To what extent were the set objectives of the communication activities achieved? What factors influenced the achievements observed?

Conclusions

There is a positive indication from the results of the evaluation that the campaign is effective in meeting most of its objectives as indicated below.

Reach and Recall

The campaign reached around 240 million people (total deduplicated reach) via paid, owned and / or earned channels, exceeding the targets set in the KPIs. In some cases, this equated to around 50% of the population of the targeted countries. The paid channels proved the most effective for generating reach (around 200 million people). Paid media spending intensity impacts the effectiveness of the campaign in terms of reach and recall.

The approach of including flagship projects appears to have been successful overall, positively contributing to the achievement of the take up of the campaign messages. In general, participants expressed a preference for materials based on personal success stories and materials with themes linked to topical issues.

Looking at spontaneous specific recall – the percentage of the audience recalling publicity/information focused on EU investment and funding – the benchmark of 30% has been met according to both the Kantar polling and the Ipsos Mori polling – which both found around 35% recalled publicity/information focused on EU investment. The results of the Ipsos Mori polling also showed a positive relationship between the growth in spontaneous specific recall (respondents who remember hearing *something* about EU investment) and the overall deduplicated reach figure as a share of the country population – evidence to confirm the role of the campaign in this.

Prompted specific recall – the percentage of the audience who recall seeing a specific ad or slogan when shown it – achieved more mixed results. According to Kantar’s final poll, just 19% recalled the campaign slogan but 29% recalled seeing specific (or similar) campaign ads. Meanwhile, Ipsos Mori’s final poll found that around 10% recalled seeing the specific ads tested in the polling, with around a further 15% saying they had seen a similar ad (likely to be another InvestEU ad shown in their country, since there is a correlation between overall paid reach in different countries and specific recall of the campaign ads shown).

For the campaign signature, Ipsos Mori’s final poll found that around 25% think they recall seeing the campaign signature “opportunities start here”, although only around 5% are certain of this.

Overall, therefore, it seems the campaign reached its 25% benchmark KPI for Recall but there are some *uncertainties in interpreting the results*.

Reach, Recall and Perception change

In terms of “awareness of positive EU impacts”, the set benchmark KPI was to increase such awareness by 5-8 percentage points. Kantar’s final poll found a 3% increase in individual awareness of positive EU impacts, whereas Ipsos Mori’s final poll found a range of results for different measures, with the best being a 4-5 percentage-point increase in those who agree that the EU helps to create the conditions for more jobs in their country or region. Therefore, this benchmark was not met, although through the triangulation of the data we see that the campaign did seem to have a positive effect on awareness of positive EU impacts.

Indeed, there are **several correlations between reach and recall, and between recall and higher awareness of EU investment and a more positive perception of the EU**. Therefore, the assumption appears to have been correct that reaching the target audience with such campaign materials would increase their awareness of positive EU impacts. In addition, we find a correlation between specific recall of the social media ads and engagement with them (whether like/share interactions, or click-throughs). This seems to confirm a causal chain from reach, through engagement, to recall and perception change – at least for the paid social media part of the campaign.

However, it appears that a recall level of 25-30% for campaign materials is not enough to produce a greater than 5% increase in such positive awareness. To the extent that positive awareness goals were not met, there are at least two possible explanations, as to **why** either the content or the recall is inadequate:

- The quality of content and messages could be factors. The large gap in engagement rate between the best and the poorest performing ads implies there is scope for significant improvements in the lowest performing ones
- An alternative could be that the benchmarks for recall and for positive awareness change are not coherent with each other. It is possible that a higher level of recall would be necessary to propagate this level of positive change

The strategy placed a large emphasis on social media and the results of the evaluation indicate that the focus has paid off in terms of reach. The importance of a tailored mix-media approach cannot be overstated. However, the **quality of recall is compromised** by over-reliance on large-scale social media communication approaches where individuals need many opportunities to see in order to elicit an influence. There are age sensitivities to take into consideration in relation to the media mix for optimal reach and recall. In terms of engagement, there are also a number of insights into the types of individuals who are likely to be more active which are useful for future campaigns.

An enabling factor to reach the target audience and promote the key messages of the #InvestEU campaign lies in the micro-targeting strategy developed during the campaign. A sufficient identification of the target audiences was key to engage citizens with the content of the flagship projects and the message of the campaign. This **microtargeting strategy proved overall effective**, and substantially contributed to campaign visibility across core countries.

EC Representations are cornerstones of the #InvestEU campaign and their support a **key enabling factor**. In terms of effective involvement in the design and planning of the campaign, the overall proactive involvement of the EC Representations however proved to be rather mixed. There are a number of findings from this evaluation which suggest that more needs to be done to clarify the roles of responsibility and accountability between the EC Representations, the European Commission and the contractor (WPP).

The involvement of other stakeholders (EDICs, journalists, third party endorsers) was also rather mixed but this appears to be related to implementation rather than issues of relevance. The involvement of the EDICs was more effective when closely coordinated with the REP.

The involvement of other DGs was important for the campaign. This included the selection of flagship projects which were then assessed at the Member State level for their relevance. There is also evidence to suggest other DGs used the overall “look and feel” of the campaign in their own key communication which further supports effectiveness.

Recommendations

We recommend,

- To **optimise the campaign for recall and perception change**, and
 - Use the lessons learnt from the focus groups in future campaign materials to ensure engaging and credible campaign materials
 - Ensure a continuous fine tuning of the campaign material by expanding the testing of the campaign material to cover also the content (next to the campaign branding) and set up focus groups before as well as during the campaign implementation
 - Use the lessons learnt from market segmentation and how to achieve optimal reach, recall and engagement. This includes the country-specific findings which can be data mined for the future.
 - Establish a more correct relation between the KPIs for reach and recall and the KPI for perception change
- To **enhance campaign management** and
 - Ensure a clear understanding of the roles and responsibilities of all of the main implementers of the campaign, with the EC taking the role of strategic oversight
 - Ensure a clear communication of the campaign strategy and scope and set in place a good project management system from the beginning of any campaign
 - Set the buy-in and support of other DGs as priority for future campaigns
- To **improve the involvement of external stakeholders** and
 - Involve the EDICs in future campaigns, with activities fully integrated into the campaign as of the design phase and coordination among the responsible DG COMM directorates at the central EC level
 - Set in place a more organised approach to engagement, support and follow up in order to improve the engagement of third-party endorsers

5.1.3 Efficiency

Were the effects/benefits achieved at a reasonable cost? What factors influenced the efficiency of the observed results?

Conclusions

The contractor and DG COMM agreed on efficiency targets for each paid media channel, expressed in the standard advertising measure of cost-effectiveness (CPM). In relation to these targets, the #InvestEU campaign would appear to have been cost effective in every channel except print. However, the overall CPM of €9.87 for the #InvestEU paid media was considerably higher than in the Pilot campaign.

Overall the budgets per country (per population) and per channel varied significantly, as would be expected in a campaign which is decentralised to better accommodate the preferences of the intended target audience. The CPM (advertising measure of cost-effectiveness) targets set by the contractor were reached with the exception of the CPM for Twitter in France, which proved to be more expensive.

The target CPM was set to €4 for *traditional channels* (print, OOH and digital). Overall this target was met for OOH and digital, even though they proved substantially more expensive in most countries. Print was two to ten times less cost-effective than the target across all zoom-in countries. In relation to the

social media channels, the target CPM of €3 for Facebook was not met, by a factor of about 15%. On the other hand, the target of €6 for Twitter was met and Instagram had the lowest CPM of all – indicating it was the most cost-effective channel in terms of generating OTS.

There were however some useful insights which can help with future campaign design, such as understanding cost effectiveness in relation to engagement (digital ads were less cost effective than most social ads, Instagram costlier than Twitter and Facebook).

In terms of efficiency of channel by country, one can conclude from the share of reach achieved by each channel **social media advertising seems to be the dominant channel in generating reach**, accounting for the largest share of people potentially reached by the campaign in all countries except Finland, France and the Netherlands

In addition, a **high positive correlation has been found between the budget spent (relative to population) and the reach (as share of population) of paid media**. This is true for the overall figures, but also for each of the channels analysed (print, digital, OOH, and social). There are variations on the cost of impressions, but this is in line with the overall market prices in the different Member States.

In relation to measuring the efficiency, it should always be approached with caution and steps taken to ensure some level of comparability. In this evaluation, there is enough data in terms of other campaigns as well as basket costs in Member States.

Comparing the cost relative to deduplicated reach, individual channels differ greatly. For example, print advertising is the most expensive in almost all countries, and OOH is the costliest in Italy and the Netherlands (although the OOH campaign in France performed well). Social media advertising on the other hand tends to be the least expensive. Overall, Hungary, Portugal and Greece were more cost effective in terms of the cost of deduplicated reach, whereas Germany, Italy and Austria appear to have been less cost efficient. Some of these differences simply reflect different market prices, but such large differences should lead to a reflection on where the advertising budget could best be spent.

In addition, it is likely that in some countries a similar level of reach could have been achieved at a lower cost by reducing the frequency of contact. In terms of optimising the cost of reach, some of the social media budget may have been more cost effective if used in other channels.

In looking at cost relative to prompted recall, as a key campaign objective, the lowest cost per recall of the social media video ads is seen in Bulgaria, where recall was highest and where social media CPM was lowest. The costliest countries were Latvia, the Netherlands and Belgium. Whereas the budget spent in Latvia was more than needed, meaning much of it was spent on repeat exposures, in Belgium and the Netherlands the aggregate reach was at the lower end (equivalent to 60-80% of social media user base) and therefore possibly too low to be effective in terms of recall.

Our analysis therefore suggests that there is an optimal budget spend in terms of the frequency of exposure to an ad in order to achieve a certain level of (deduplicated) reach and recall: too little, as in Germany, and the level of exposure to the campaign materials is too low to have a significant impact on recall; too much (and too much spent through the same channels), and much of the budget is spent on multiple exposures to the same people – reducing its cost effectiveness. In the case of Greece, Hungary and Italy – the three most cost-effective countries in terms of recall after Bulgaria – the deduplicated reach of social media ads is equivalent to around 90-95% of the number of social media users in the country, with the average “frequency” of exposure to the ad by each person reached at between two and three times.

Looking at the paid media collaborations, their cost effectiveness is comparable with paid ads overall, although vlog/YouTube collaborations proved to be the most expensive in terms of CPM. On the other hand, vlog/YouTube posts did have a much higher engagement rate than paid ads so their extra cost could be justified in cases where the objective is audience engagement.

The involvement of the REPs and the EDICs was significant in helping with efficiency and there are some good examples of capitalising on their existing work to augment messages.

In addition, the engagement of local PR agencies helps to ensure that the activities and messages are well tailored to the audience in an efficient manner, although there are mixed results seen from the various contractors, perhaps related to the quality.

In conclusion, this campaign is of a significant size and is delivered across very different countries in a targeted and tailored way. At a broad level, the most efficient way of doing this is a multi-channel approach, as was taken. Within this mix media approach, concentration on social media meant that the costs were kept as low as possible, but still took into account the need for a wide reach and recall.

Recommendations

We recommend,

- To **decide on channels and budget mix based on the objectives** for any specific campaign and channel (whether reach, engagement, recall or awareness/perception change). For example,
 - Where engagement (and click-throughs to a website) is the goal, Instagram was costlier than Twitter and Facebook - despite being less costly in terms of reach; Facebook was the most cost-effective for engagement, while being costlier for the creation of reach
 - If the objective is recall, there is an optimal budget spend (in relation to the size of the population) in terms of the frequency of exposure to an ad in order to achieve a certain level of (deduplicated) reach and recall. But if the objective is awareness/perception change, the budget spend may need to go beyond the optimal levels for reach and recall, in order to achieve the targets
- To take account of the **difference in costs of channels in the different countries**
 - If costs in a particular channel in a particular country are much greater than the alternatives, redirect the budget to other countries or more cost-effective channels – unless there is a very specific reason to target a specific localised audience.
- To **optimise the cost of reach in social media** and
 - Monitor the level of saturation of channels and redirect some of the social media budget to other channels. is monitored once a high-level has been achieved (deduplicated reach of over 90% and frequency of contact of more than twice)

5.1.4 Coherence

Did the various #InvestEU communication activities work well together and with other EU communication activities?

Conclusions

When considering the ‘core’/WPP campaign and interlinks between the overall concept, the key messages, target audiences and channels used the campaign is internally coherent overall. The core principles of the campaign, with a centralised defined concept and approach, with local tailoring of channels and content to meet local concerns and areas of interest, appear from a coherence perspective to have worked well. Likewise, the intended media mix model of Paid, Earned, Social and Owned channels presented in WPP's original proposal appears in practice to have operated well, combining the different channels managed in an overall coherent fashion – with centralised/corporate management of certain channels, and decentralised (Representation) management of other channels.

In general terms, the main potential issues with internal coherence stems from the fact that there are different implementation mechanisms for the campaign – with associated funding mechanism (the core campaign in the zoom in countries managed under the WPP contract, separate resources available for the Representations to undertake activities directly, resources for the investEU related citizens dialogues and finally grants available for the EDIC).

These risks are minimised by the leading role of the Representations the management of the local outreach strategies as well as their role in terms of proposing actions for funding under the Representation envelope. In this respect interviewees highlight actions managed by the Representations were aligned and followed logically from the overall campaign approach as well as from the local outreach strategy. However, the analysis of activities undertaken also showcase occasional “activity overlaps” – illustratively with advertising and advertorials outside the WPP envelope being extensively used in a few zoom-in countries (by both EDICs and EC Representations). This does not necessarily mean that the campaign generated duplication of efforts, as activities may have complemented the activities undertaken under the WPP envelope. However, the very uneven budgetary distribution does raise the question of coherent and efficient resource allocation across the different earned, owned, paid and shared channels and across Member States.

As regards the EDICs it may be concluded that communication activities in terms of topical coverage, overarching messages and communication channels in general terms, are aligned. Also, the relative concentration of EDIC resources in the focus countries (73% of the total EDIC envelope) is aligned with the campaign approach. However, the level of coherence varies across Member States with several EDICs focusing their activities on businesses and/or stakeholder audiences and with some focusing resources on local advertising campaigns. The timing of the call and the relative broad scope of the call for proposals for the EDIC actions appear as the main factors explaining identified coherence issues between the EDICs activities and those of the campaign overall.

At the corporate level the coordination of the campaign, with activities of the Spokesperson (SPP), the EIB and the EIF is satisfactory, albeit there is room for improvement, especially with regard to the EIB and the EIF. Some overlaps are seen as unavoidable, in particular in relation to press and earned social media outreach. Issues of duplication are minimised though close collaboration, sharing of communication planning, and mutual use of content – especially between the corporate campaign and the SPP.

Looking at the coherence with other DGs, the main potential areas of overlap with communication activities lies with the communication work undertaken by DG REGIO and/or communication undertaken by Managing Authorities of the Regional Funds. Concurrently with the corporate campaign, DG REGIO conducted several-related communication campaigns (in particular “EUinMyRegion”), with significantly smaller budgets than the InvestEU campaign. What this does present is scope for improved coordination with Managing Authorities and also with forthcoming campaigns of other DGs.

Recommendations

We recommend,

- **To strengthen the campaign management across the EC and**
 - Ensure closer coordination between the different Directorates involved in management within DG COMM (Dir. A, B and C)
 - Ensure a common understanding on the expected relative contribution of the different strands of activities/lines of funding (i.e. how activities funded under the EDIC and Representation envelopes are expected to complement and add value to the actions undertaken under the “main campaign” led by the contractor)
 - Improve existing guidelines on the nature of activities which may and may not be funded under the separate envelopes
 - Ensure the collection of monitoring data related to the campaign outputs and results for all #InvestEU-related activities
- **To plan the involvement of the EDICs carefully** if these are to be involved in subsequent campaigns.
 - Manage the risk of misalignment in timing with the ‘core’ campaign because of the call process (design of calls, call submission, review and selection of applications)

- Consider a two-step call process, with early warning and call for expression of interest – and a second application process, with shorter turn around, once the campaign is launched (or shortly before campaign launch).
- **To ensure external coherence and maximise resources spent**
 - Consult with the EC REPs, and as relevant the Regional Funds Managing Authorities, to identify the nature and scale of forthcoming national campaigns and communication initiatives on EU funded projects – and when possible – explore opportunities for collaboration, in partnership with DG REGIO
 - In relation to the continuation of #InvestEU, work in close collaboration with DG REGIO to ensure complementarity of this campaign with DG REGIOs campaign” “Delivering in all EU regions” Consider a twostep call process, with early warning and call for expression of interest – and a second application process, with shorter turn around, once the campaign is launched (or shortly before campaign launch).

5.1.5 EU added value

What is the additional value resulting from corporate communication activities at EU level, compared to what could be achieved by MS at national/regional levels?

Conclusions

The #InvestEU campaign has added value across all zoom in countries - compared to the activities already undertaken by national authorities. This added value shows a number of different ways including notably generating awareness of the benefits of EU funded projects on the ground and highlighting the EU’s contributions to the benefits generated. There is no evidence of crowding out communication activities of national actors. On the contrary there are distinct examples of the involvement of national, regional or local agencies or politicians in campaign activities and/or in spreading the message of the campaign.

The evidence available also shows the relative advantages of the corporate campaign approach, compared with campaigns funded by the EU but managed by Member State authorities. These advantages relate especially to the possibility to design clear and coherent EU messages, a coherent but tailored set of channels across Member States and the definition of specific outputs, results and outcomes across the campaign, against which progress can be measured. Overall there is enough evidence to suggest that an alternatively national run campaign funded by the EU might lose the “EU message”, risks becoming politicised, and is unlikely to imply cost and efficiency saving for the EC.

In terms of implementation design, there is abundant evidence to suggest that the approach used by #InvestEU, combining one overarching campaign strategy with a decentralised implementation approach is a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC. However, clear cut conclusions cannot be drawn regarding the relative additional value resulting from corporate communication activities implemented as the #InvestEU campaign relative to what could be achieved had the campaign fully decentralised, designed, lead and implemented by the EC Representations. When considering the potential strengths and weaknesses of the corporate communication approach, however, it is the contractor’s assessment that there are likely to be relatively more benefits in maintaining a corporate, but decentralised approach to the EC’s communication campaigns.

Recommendations

We recommend

- To maintain the **corporate, but decentralised approach** to EC’s communication campaigns
- To **maximise opportunities for further localisation**, even if this may weaken topical coherence, but always ensuring target audience focus and coherence in channels

5.1.6 Sustainability

Are the effects of the #InvestEU communication actions likely to last after the communication interventions end? To what extent the issues addressed by the communication activities require continuous communication effort?

Conclusions

The #InvestEU campaign represents a new approach for corporate communication. The length of the #InvestEU campaign, one overarching campaign strategy with a decentralised implementation, its comprehensive umbrella narrative and its overall inclusion in the corporate communication strategy are important to consider when devising an approach with objectives for a sustainable effect.

There is evidence that this type of approach has been more successful than previous models however the effects of any campaign will tail off following the main activities. For each new wave of advertising there is a growing probability it is reaching individuals who have already been reached by previous waves.

In terms of reach alone, therefore, additional campaign spending tends to have a reduced additional effect as the campaign goes on. The effect is particularly strong for additional spending within a particular channel directed towards a particular target audience (for example, social media users in a specific country). In addition, nearly all the change in recall and positive awareness, as measured by Kantar Public's polling, occurred during the period between the baseline and interim polls. Very little change can be found between interim and final poll. The impact of the campaign can mainly be associated to the first waves, while very little additional effect can be seen from continued campaigning.

In terms of recall and perception change, therefore, additional campaign spending also seems to have a reduced additional effect as the campaign goes on. Furthermore, there is evidence of a tailing off in terms of recall following the end of the campaign. If, as some academic literature suggests, visual and video content is retained well for a period of weeks, before tailing off, it explains why recall and other effects remain relatively constant during the campaign, as each advertising wave is seen and retained for a period, and then starts to decline a few months later.

In terms of longer-term recall and perception change, therefore, additional campaign spending could have an increased additional effect if it takes place after a long-enough period of time that the previous wave of exposure to the campaign has started to decline in people's memories.

This is important to note, when considering approaches which intend to have sustainable effect as the strategy can be tailored to mitigate against over exposure of a target group and widen reach, if not recall. As such, the #InvestEU campaign offers important lessons for how to extend the communication effect. The issue is to what extent can some level of awareness remain – and how can this be achieved.

In terms of the material produced for the #InvestEU campaign and based on the selection of flagship projects as well as the development of related storytelling, we can observe rather mixed-results in terms of sustainability. The material was seen as valuable for internal stakeholders, especially among DGs, EC Representations and EDICs but the number of toolkits downloaded tailed off quite dramatically after the first year.

The engagement of journalists to enhance sustainability is important but not effectively implemented for this campaign. The press trips worked well but there was little follow up and reported a need to have activities over a period of time in order to motivate them to write stories. Therefore, there are useful lessons to be learnt which can enhance the sustainability in the future.

Recommendations

We recommend

- To **plan for sustainability from the outset of any campaign**, duly considering the best channels by which messages can be reinforced and multiplied, e.g. through

- Joint development of material, take-up of material, communication treatment and coverage by DG COMM, line DGs, REPs and EDICs
- More sustained relationship-building with journalists, ensuring continuity of contact
- **Mitigate against reaching the same audience many times** and increase the coverage to **enhance reach and potentially recall**
 - Consider waves of microtargeting for future campaigns
 - Extend the intervals between campaign waves. Additional campaign spending could be more effective if applied as the effects of previous waves have already started to decline

5.2 Overarching conclusions and recommendations

5.2.1 Summary conclusions

The #InvestEU campaign constituted a highly appreciated breakthrough in EC communication to the citizens, focused in all its components on communicating the benefit of EU investments to the citizens.

The approach used by #InvestEU, combining one overarching campaign strategy (led by DG COMM) with a semi-decentralised implementation approach setting the REPs in the driving seat, with close coordination between the EU Representations and DG COMM was a key campaign strength and a clear improvement compared to previous campaigns undertaken by the EC. It was overall effective and allowed for a high level of relevance, coherence and effectiveness, even though it created some issues related to efficiency because of the complexity for management and coordination.

A campaign strength was the focus on tailoring the narratives to the national sensitiveness and concerns, ensuring high relevance and good effectiveness. This tailoring of channels and messages was done whilst maintaining the core narrative – an important accomplishment of the campaign approach. Although in practice this approach was not optimal in each Member State, the overall central messages remained clear throughout.

The campaign #InvestEU met almost all its objectives over its operational lifetime. There were countries where significant effects are evident as a consequence of the mixed media approach. Although there was some variation in terms of the quality of the message content and delivery, this also provided additional key learning insights for future campaign design. A major lesson learnt from the #InvestEU campaign regards the critical importance of the pre-testing of messages and storylines in order to optimise the campaign materials - ensuring relevance, and thus effectiveness related to the objectives of engagement and the citizens' change in perception.

The efficiency of the campaign was ensured through the mixed media approach and a concentration on social media. As always, there are pros and cons regarding the choice of media channels as many of the channels preferred by the citizens in the Member States are more costly media options. With the REPs, on the ground, the involvement of other players acting as intermediaries and/or multipliers such as the EDICs and third-party endorsers formed a significant part of the local campaigning activities. Overall, there were strong variations in the way in which the coordination, coherence and integration with the activities of the EDICs, third-party endorsers and journalists was achieved. In general, the involvement of these local players could be improved in future campaigns to better effect. Of note is the way in which in some countries the integration of the EDICs' activities into the 'main' campaign substantially increased effectiveness and efficiencies.

Evidence collected confirms the importance of a centrally coordinated approach, strategically steered by DG COMM (in the case of #InvestEU). There was a significant amount of key data collected and analysed through the monitoring of the campaign. There were also clear targets set in advance, which helped DG COMM to understand if the campaign was on track and reaching its objectives which was discussed and deliberated by the involved parties. This type of data, when collected for a campaign is very valuable in providing the strategic insights necessary to shape the campaign roadmap, feedback to the

implementing parties and check against the performance indicators to see if everything is on track or adjustments need to be made. This includes adjustments to the targets, which may not always remain credible once a campaign is underway.

The #InvestEU campaign represents a new approach for corporate communication. The length of the #InvestEU campaign, one overarching campaign strategy with a decentralised implementation, its comprehensive umbrella narrative and its overall inclusion in the corporate communication strategy are important to consider when devising an approach with objectives for a sustainable effect.

5.2.2 Key recommendations

We recommend DG COMM to **maintain the corporate, semi-decentralised approach** and encourage future campaigns to dedicate a similar level of attention to **pre-campaign research** informing the campaign design.

A key recommendation for future campaigns, however, is to **take a more holistic approach** to their implementation, integrating strategies and actions by the various institutional and external actors involved in delivering the campaign in order to enhance coherence and effectiveness.

This implies ensuring clear coordination and well-defined responsibilities of all of the different parties involved. Wider coordination should also take place with other EU related communication activities at the Member State level in order to increase coherence and leverage effects. This would be in partnership with other DGs and in particular DG REGIO, e.g. enabling collaboration between the REPs and the Structural Funds managing authorities at the national level.

The coordination starts within DG COMM (across its Directorates), which includes the strategic insight and extends through to the EC Representations, the EDICs and, for example, the regional funds managing authorities. This would also include the third-party endorsers which can be expected to play an important role in conveying the messages to a wider audience, enhancing their credibility. Evidence showed the need to improve the involvement of these actors through a more organised approach to engagement, support and follow up. Across all those key parties involved, a full understanding of the breadth of activities is necessary at the design phase of the campaign.

Coordination within DG COMM relates also to the collection and integration of qualitative and quantitative data on outputs and results related to *all* activities implemented, in order to ensure a full view on the campaign performance and its effects. This implies the need for a coordinated approach to the monitoring of the various #InvestEU campaign components (central campaign, campaign activities by the REPs, EDICs, and the Citizens Dialogues), ensuring the collection of quality monitoring data that can be integrated and analysed in a cost-efficient manner.

A final key recommendation is to **consider sustainability from the outset** of any campaign while **enforcing campaign efficiency, including efficiency in implementation**.

To foster sustainability, this evaluation has shown the importance of ensuring continuous fine tuning of the campaign material to maximise the impact. We suggest expanding the testing of the campaign material in future campaigns to cover also the content of the campaign (next to the campaign branding) by setting up focus groups *before as well as during* campaign implementation.

We also invite DG COMM to enhance the use of novel (qualitative) techniques better to capture the effects (potentially) leading to perception change, such as text mining of press coverage and the qualitative analysis of online conversations.

In relation to efficiency, due consideration needs to be taken of the resource intensity of the activities, both financial and human resource (including skills). This regards especially the REPs but also other actors involved in the implementation of the activities such as other DGs, the project beneficiaries, and other intermediaries.

Mechanisms to enforce efficiency also include the planning of microtargeting waves for future campaigns and the extension of the intervals between campaign waves in order to mitigate against

reaching the same audience many times, and decision-making on channel and budget mix based on campaign objectives and priorities (reach, recall, engagement, or perception change) rather than market price. We also recommend future campaigns to take account of different costs in channels over the countries and to optimise the cost of reach in social media by monitoring the level of saturation of the channels and redirecting some of the social media budget to other channels once a high level of reach has been achieved.

technopolis |group| Belgium
Avenue de Tervuren 188a
B-1040 Brussels
Belgium
T +32 2 737 74 40
F +32 2 727 74 49
E info.be@technopolis-group.com
www.technopolis-group.com