


The Europe Brand

Perceptions in France, Germany, Italy and UK



- 
- 1. Objectives and Methodology** p. 3
 - Objectives and Methodology
 - Sample

 - 2. Image and values of the Europe Brand** p. 6
 - Image of the Europe Brand
 - Values of the Europe Brand
 - Strength in terms of sectors
 - Attachment and sense of belonging

 - 3. Identity and symbols** p. 21
 - Awareness of the motto
 - Awareness of the European flag
 - Perceptions of the European flag
 - Strength in terms of sectors

 - 4. Personification of the Europe Brand** p. 28
 - If the Europe was a commercial brand?
 - If the Europe was a character?



01

Objectives and methodology

Objectives and Methodology

Nomen, an agency specializing in branding and in Brandcare in France and abroad, reveals the results of its survey "**How is the Europe brand perceived in the main European countries?**".

In the wake of the European elections, despite rising anti-European and Eurosceptic sentiments, citizens are asked to participate on the direction they want to give to Europe in the coming years. In this context, Nomen has conducted a survey aiming at answering the following objectives:

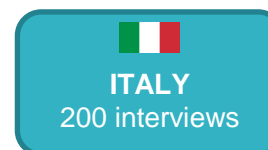
- ❖ **Obtain an overview of the perception of European citizens regarding the Europe brand in terms of brand image and values**
- ❖ **Identify the perceived strengths and market values of the Europe brand**
- ❖ **Evaluate if these perceptions are consistent across investigated countries**

Why the Europe brand?

The European Union is most often understood as a political, geographical or economic entity. Yet Europe has all of the features which define a brand: it has a logo (the flag), enjoys a certain reputation, communicates internally (members) and externally (international), and attempts to attract and retain customers, such as tourists, businesses, local and foreign investors etc.

Methodology:

In order to gain a clear and representative vision of the perceptions of the Europe brand by European citizens, Nomen has focused on the 4 main European countries and has conducted an on-line survey on a sample of 200 respondents per country in France, Germany, Italy and UK using the panel Research Now.



Quotas have been used to obtain a representative sample of the national population in terms of age, gender and occupation.

Sample



In %

	Total				
Basis	803	201	200	202	200
Age					
18 to 44 years	44	49	40	42	46
18 to 24 years	9	10	9	9	9
25 to 44 years	35	38	31	33	37
45 years and more	56	51	60	58	55
45 to 64 years	33	30	35	33	32
65 years and more	24	21	25	26	23
Gender					
Male	49	48	49	49	49
Female	51	52	51	51	51
Occupation					
CSP+	16	17	22	15	9
Farmers/farm-workers	0	0	0	1	1
Artisans, retailers, company directors hiring 10 or more employees	4	5	7	5	1
Executives, engineers and independent professionals	11	12	16	9	7
Intermediary professions	14	14	6	14	21
CSP-	33	35	35	29	35
Employees	26	32	27	23	22
Operators	7	3	8	5	14
Inactives	37	33	38	43	35



02

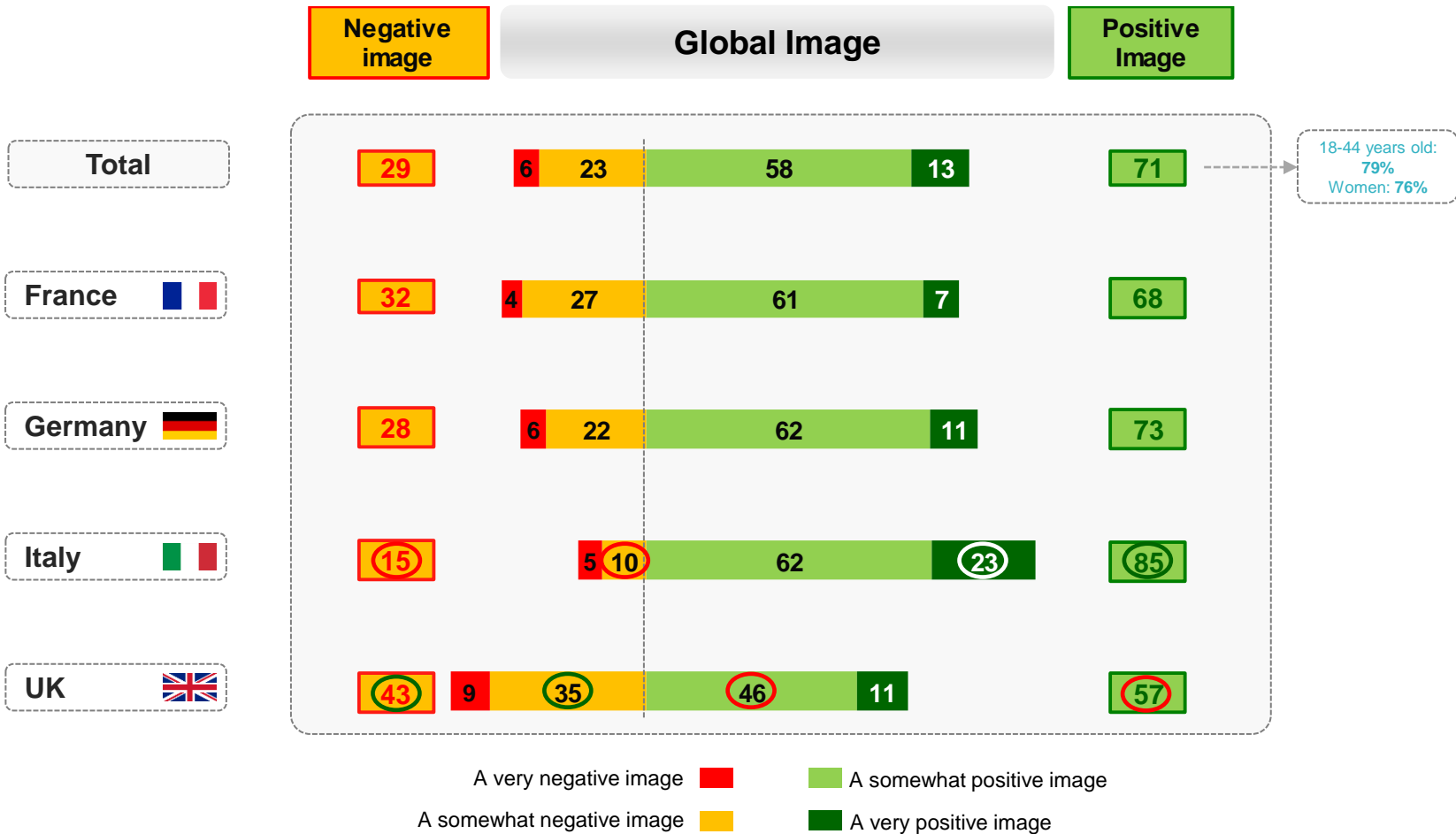
Image and values

Global image of the Europe Brand

To begin, in your opinion, is the image evoked by the Europe brand very positive, somewhat positive, somewhat negative or very negative?

Basis = 803

In %

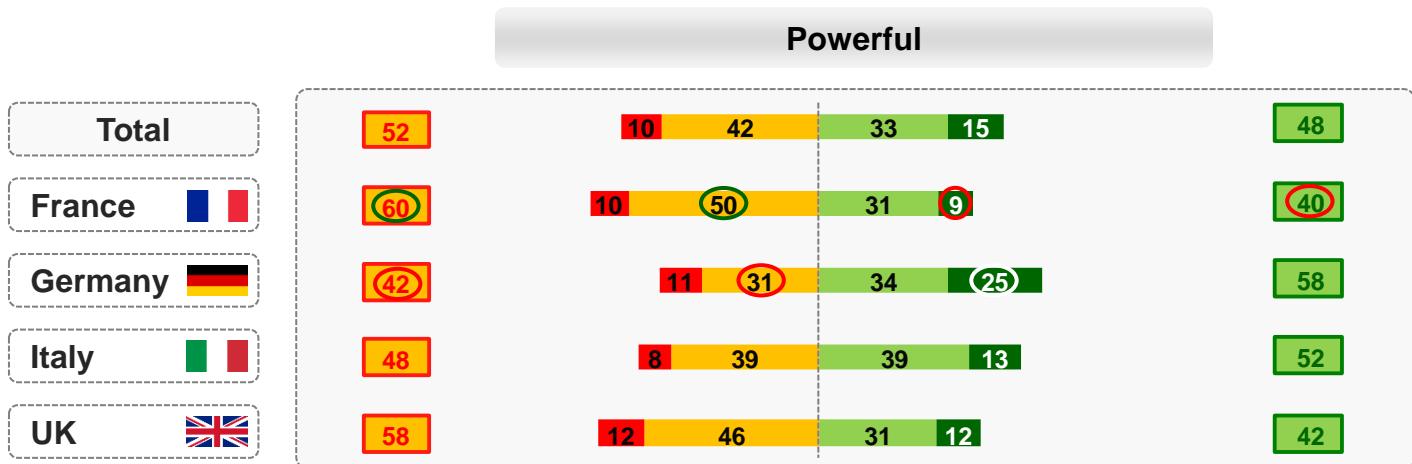
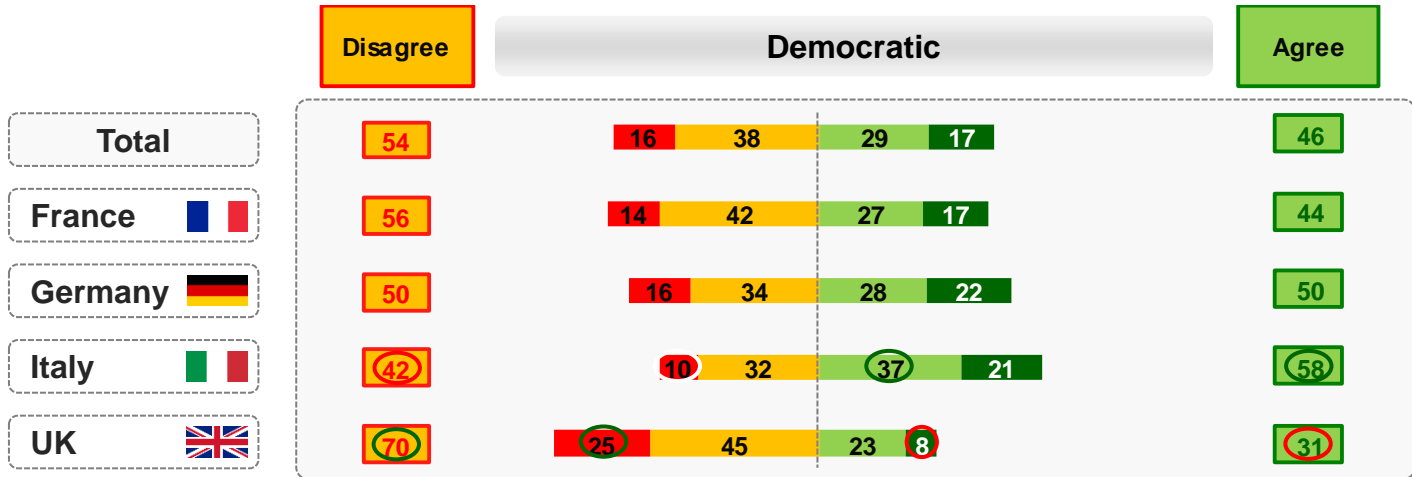


Europe Brand – Detailed image (1/5)

How would you assess the Europe brand in the following areas on a scale from 0 to 10 where 10 means that you strongly agree and 0 means that you strongly disagree. Intermediary scores allow you to moderate your judgment.

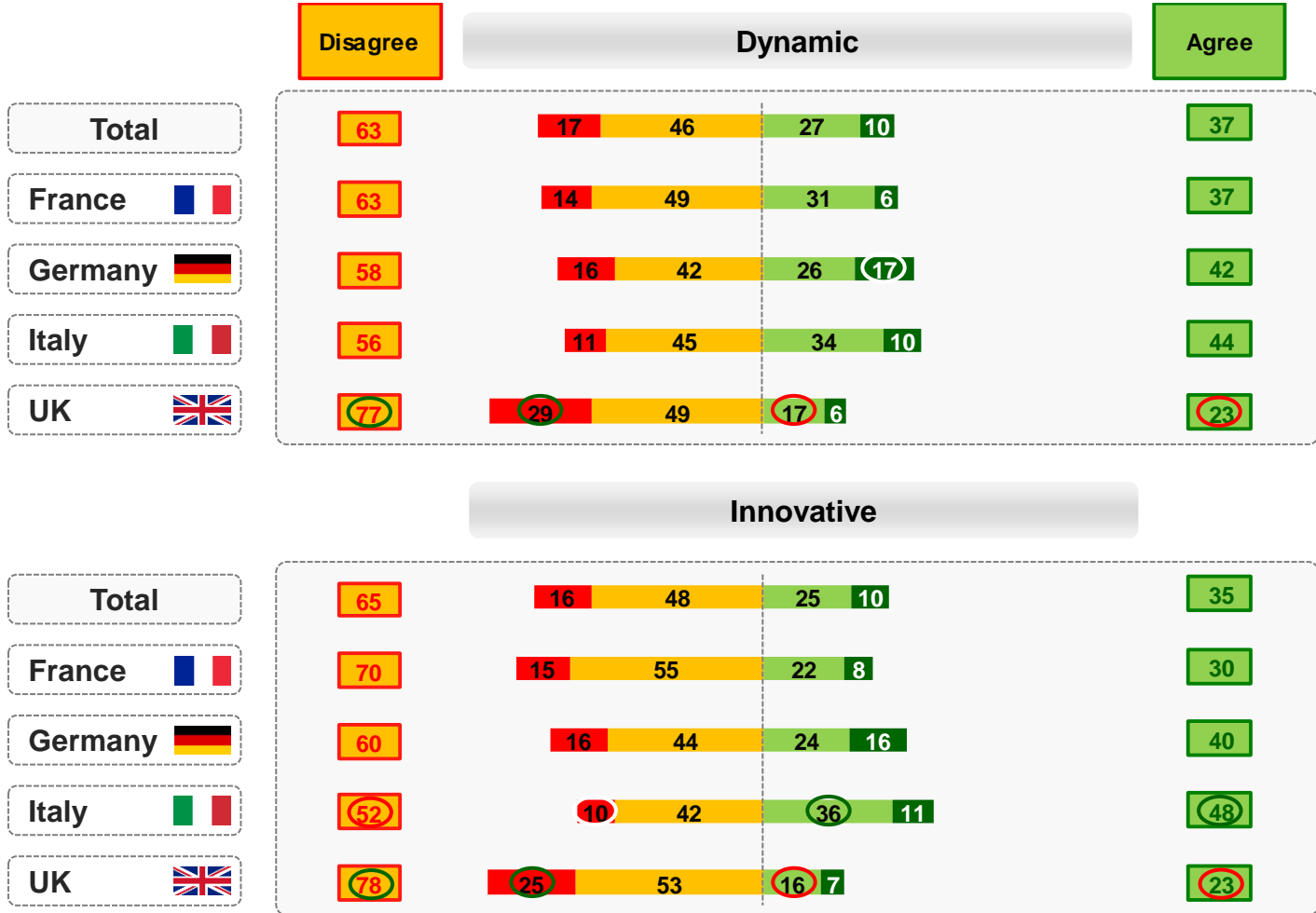
Basis = 803

In %



Europe Brand – Detailed image (2/5)

How would you assess the Europe brand in the following areas on a scale from 0 to 10 where 10 means that you strongly agree and 0 means that you strongly disagree. Intermediary scores allow you to moderate your judgment.

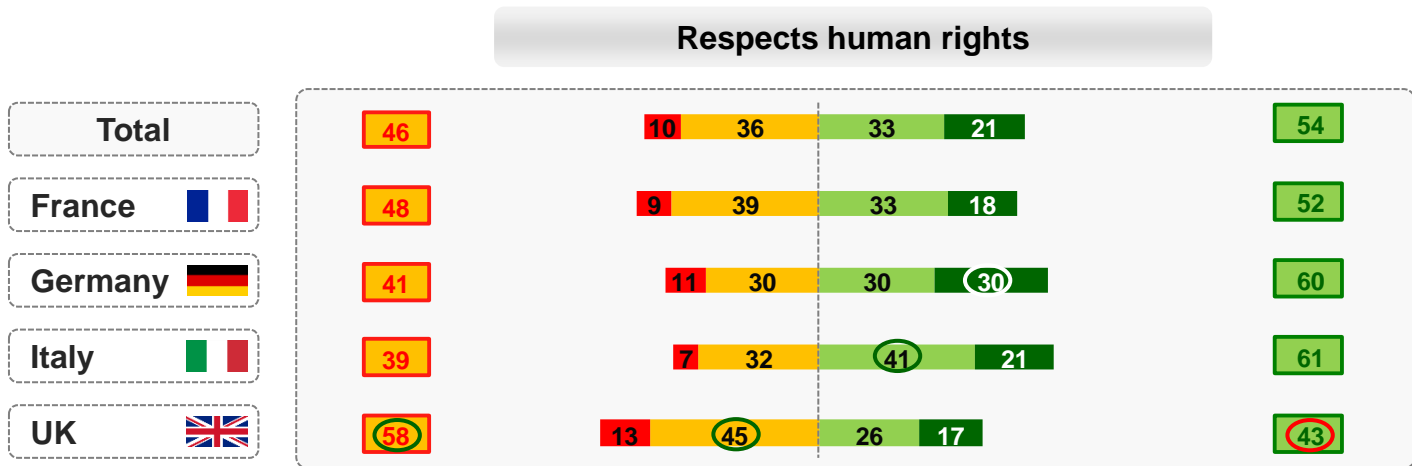
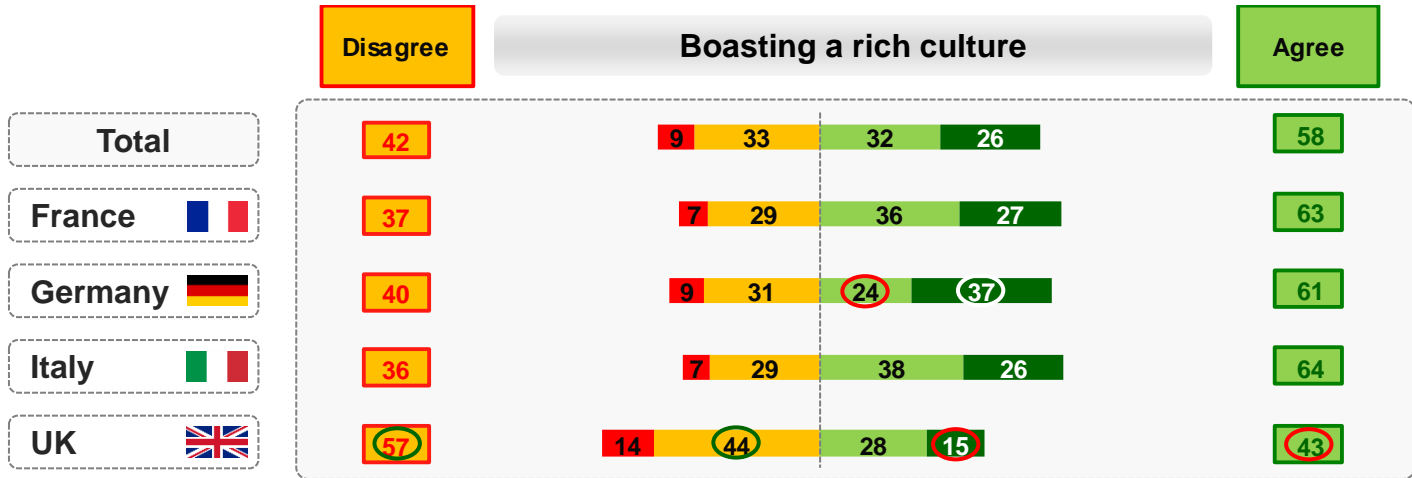


Europe Brand – Detailed image (3/5)

How would you assess the Europe brand in the following areas on a scale from 0 to 10 where 10 means that you strongly agree and 0 means that you strongly disagree. Intermediary scores allow you to moderate your judgment.

Basis = 803

In %

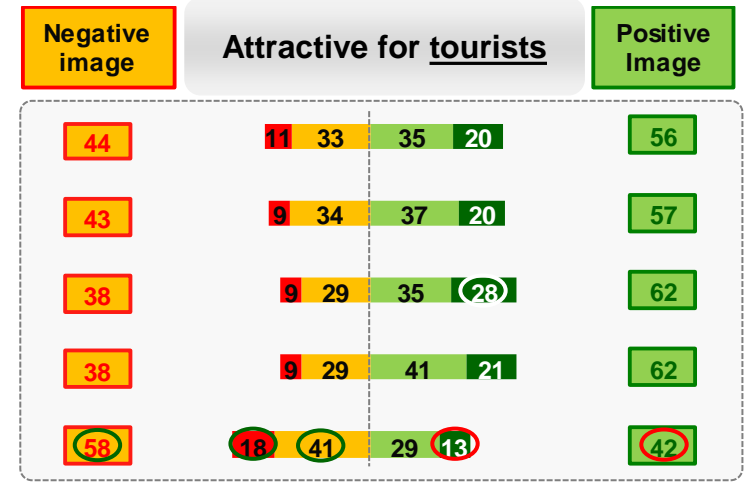
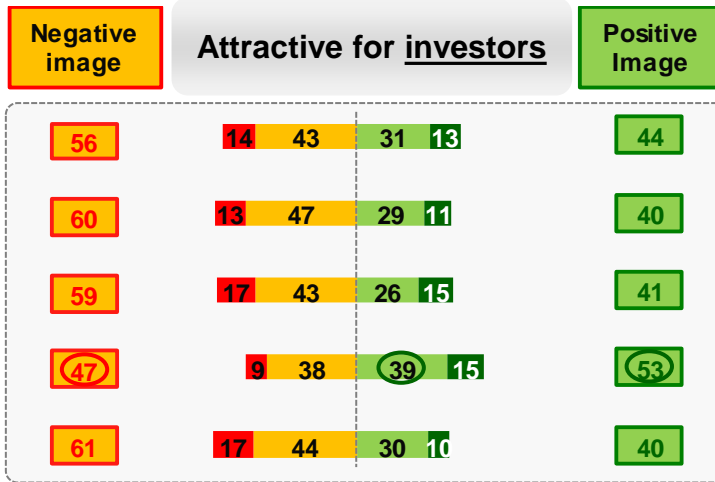


Europe Brand – Detailed image (4/5)

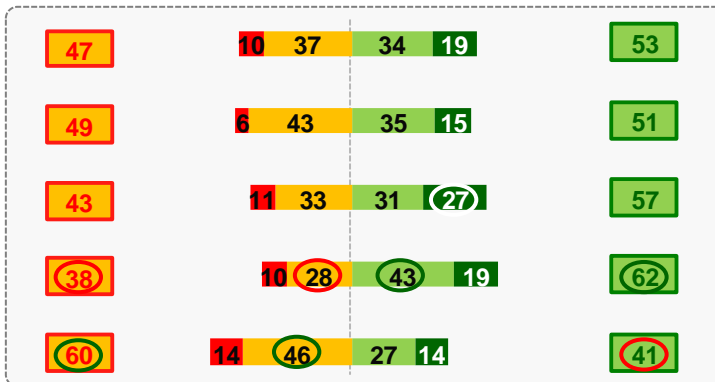
How would you assess the Europe brand in the following areas on a scale from 0 to 10 where 10 means that you strongly agree and 0 means that you strongly disagree. Intermediary scores allow you to moderate your judgment.

Basis = 803

In %



Attractive for foreign students



■ Notes from 0 to 3 ■ Notes from 4 to 6
■ Notes from 7 to 8 ■ Notes from 9 to 10

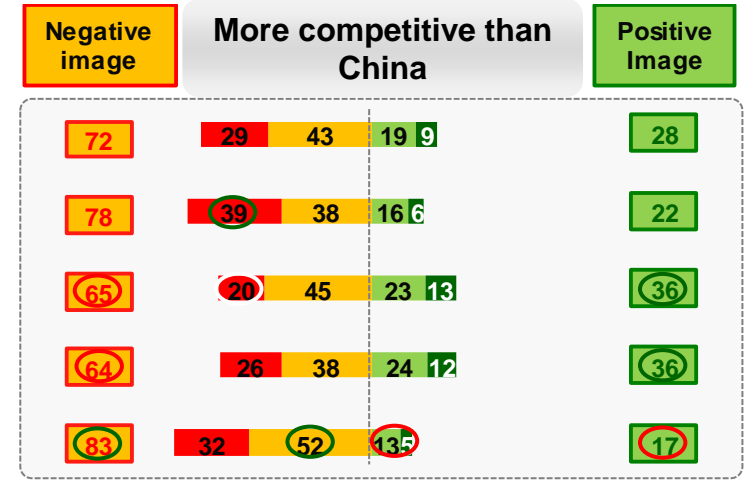
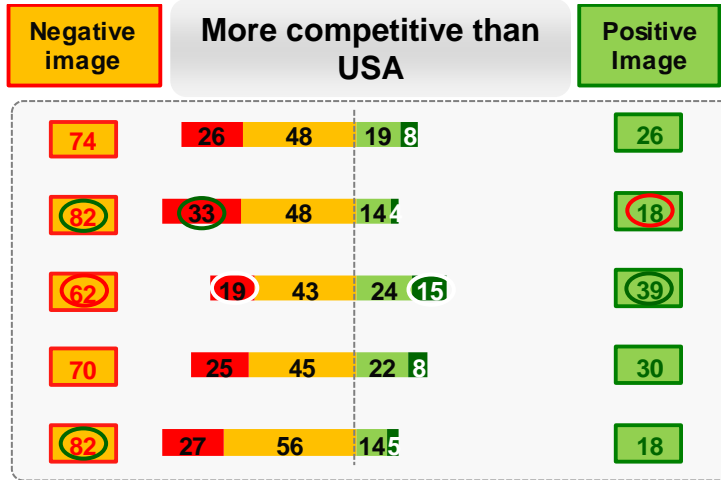
○ Score significantly higher/lower than the total

Europe Brand – Detailed image (5/5)

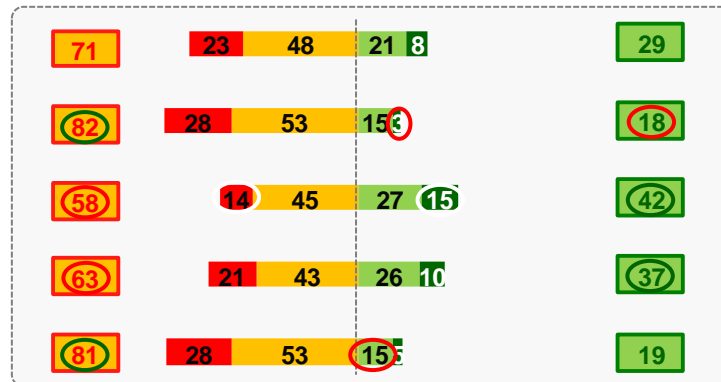
We are now going to discuss your views on the competitiveness of the Europe brand in relation to other major economic blocks (in particular in terms of attractiveness for investors, businesses and tourists). Please state to what extent you agree with the following statements on a scale from 0 to 10 where 10 means that you strongly agree and 0 means that you strongly disagree. Intermediary scores allow you to moderate your judgment.

Basis = 803

In %



More competitive than Japan



■ Notes from 0 to 3 ■ Notes from 4 to 6
■ Notes from 7 to 8 ■ Notes from 9 to 10



82 Score significantly higher/lower than the total

Image of the Europe Brand

Synthesis – Average note



Average score (from 0 to 10)

Total	France 	Germany 	Italy 	UK 
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Global Image

	71%	68%	73%	85%	57%
Boasting a rich culture	6,7	6,9	7,0	7,0	6,0
Attractive for <u>tourists</u>	6,5	6,6	6,8	6,8	5,8
Respects human rights	6,5	6,4	6,7	6,8	6,0
Attractive for foreign students	6,4	6,5	6,6	6,6	5,9
Powerful	6,2	5,9	6,6	6,4	5,9
Democratic	6,0	6,0	6,2	6,6	5,1
Attractive for <u>investors</u>	5,9	5,9	5,8	6,5	5,6
Innovative	5,6	5,5	5,9	6,1	4,9
Dynamic	5,6	5,6	5,9	6,0	4,8
More competitive than Japan	5,2	4,5	6,0	5,5	4,6
More competitive than USA	4,9	4,3	5,7	5,2	4,5
More competitive than China	4,9	4,2	5,5	5,4	4,5

Image of the Europe brand

Synthesis

Image of the Europe brand:

The Europe brand is positively perceived in terms of global image, with some variations depending on the country. Italian citizens show the most positive image with 85% of positive feelings, followed by Germany and France with, respectively, 73% and 68% of positive answers. **UK citizens show significantly more neutral perceptions** with 57% of positive answers only. It is interesting to see that younger respondents have overall a more positive perception of the Europe brand (79% vs. 71% overall)

In terms of detailed image :

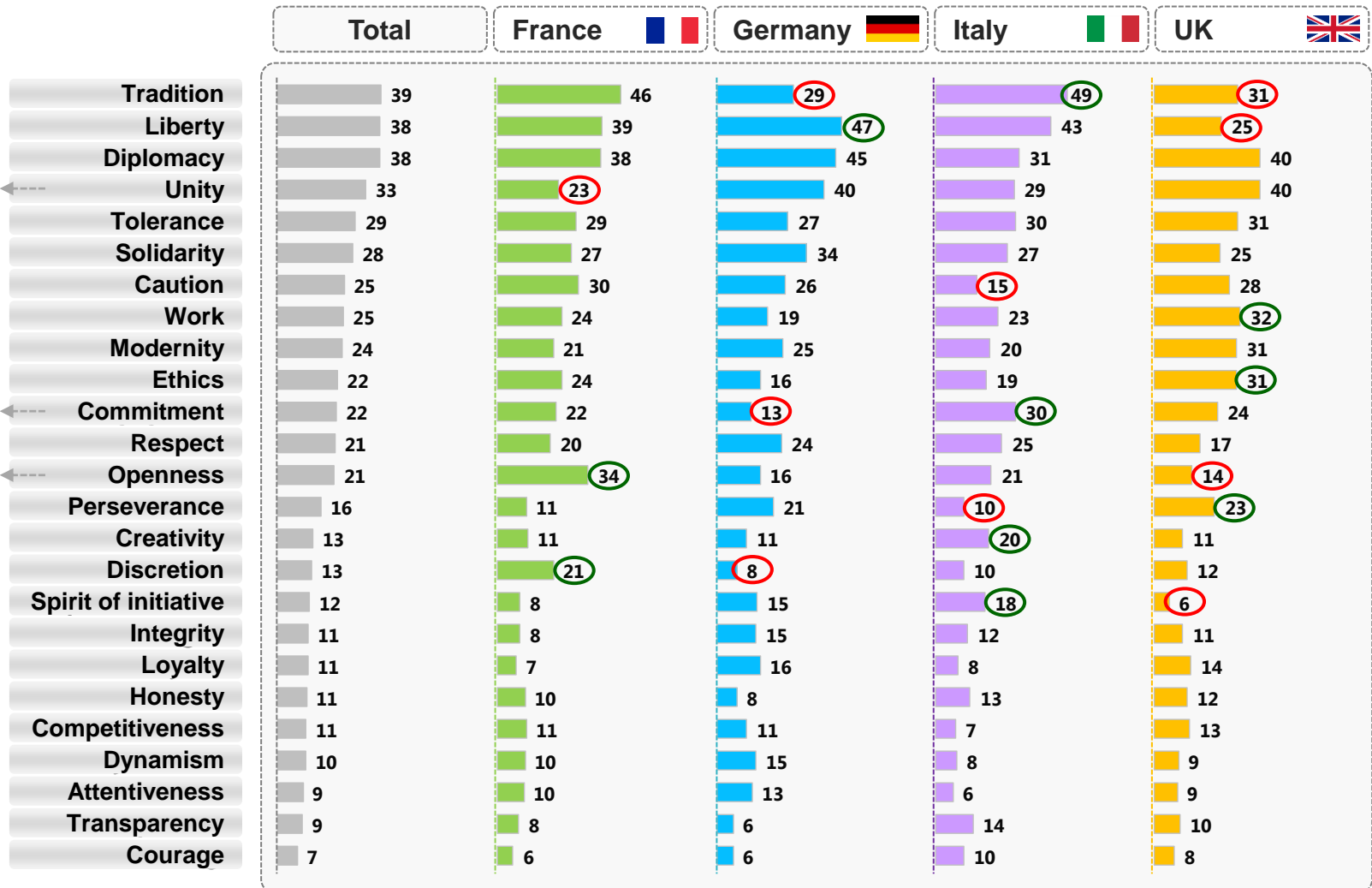
- **The Europe brand is positively perceived on its cultural wealth, its attractiveness for tourists and foreign students and its respect for human rights.**
- It shows more neutral perceptions on the powerful dimensions, the democratic aspects
- It suffers from a **very bad image for aspects related to performance: competitiveness, dynamism, innovation and creativity**
- As for the global image, **UK citizens show more negative perceptions** than other citizens on most dimensions
- As a tendency, **Italian citizens show slightly more positive perceptions** of the Europe brand on most dimensions

Values of the Europe Brand

What are the top 5 values that you would associate with this Europe brand from the following:

Basis = 803

In %



18-44 years old: 38%

Women: 27%

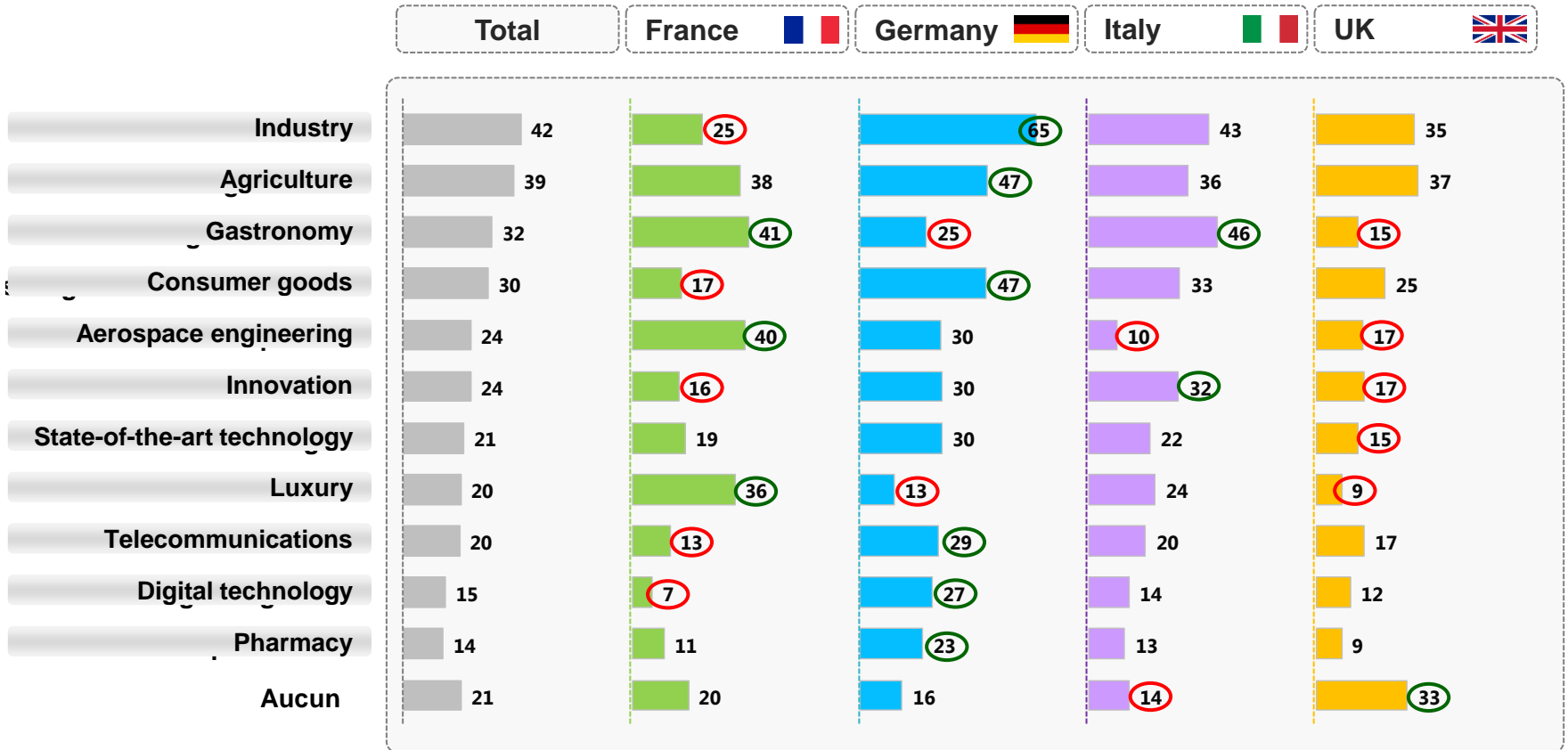
18-44 years old: 26%

Strength of Europe in terms of sectors

In your opinion, the Europe brand is principally renowned for:

Basis = 803

In %



Values and Strengths of the Europe Brand - Synthesis

Values of the Europe Brand:

When we talk about the values of the Europe brand, we observe that European citizens mentioned mainly human values such as **Tradition (39%), Liberty (38%), Diplomacy (38%),** Unity (33%), Tolerance (29%) or Solidarity (28%), homogeneously across the investigated countries. In contrast, **values of competitiveness, dynamism and courage show particularly low levels of citation** and highlight the perceived lack of competitiveness and belligerence of the Europe brand.

More closely, we observe **some nuances between investigated countries on the most important values** of the Europe brand:

- **French** citizens mention significantly more values of **openness** and of **discretion**
- **Germans** appear more focused on values of **liberty**
- **Italians** are more focused on values of **tradition** and **commitment**
- **UK citizens** are more focused on values of **work, ethics** and **perseverance (23%)**

Strengths of the Europe brand in terms of sectors:

Europeans citizens show different opinions regarding the key industries of Europe brand:

- **Germans** highlight **industry, agriculture and consumer goods**
- **French** mention **gastronomy, aerospace and luxury goods** as the greatest strengths of the Europe brand
- Once again, UK respondents show scores significantly lower than other respondents

Thus, **each country tends to reflect its own areas of competence as the key fields of the Europe brand.**

Attachment to the Europe Brand

On the whole, do you feel very, fairly, not very or not at all attached to this Europe brand?

Basis = 803


In %

Not attached

Attached

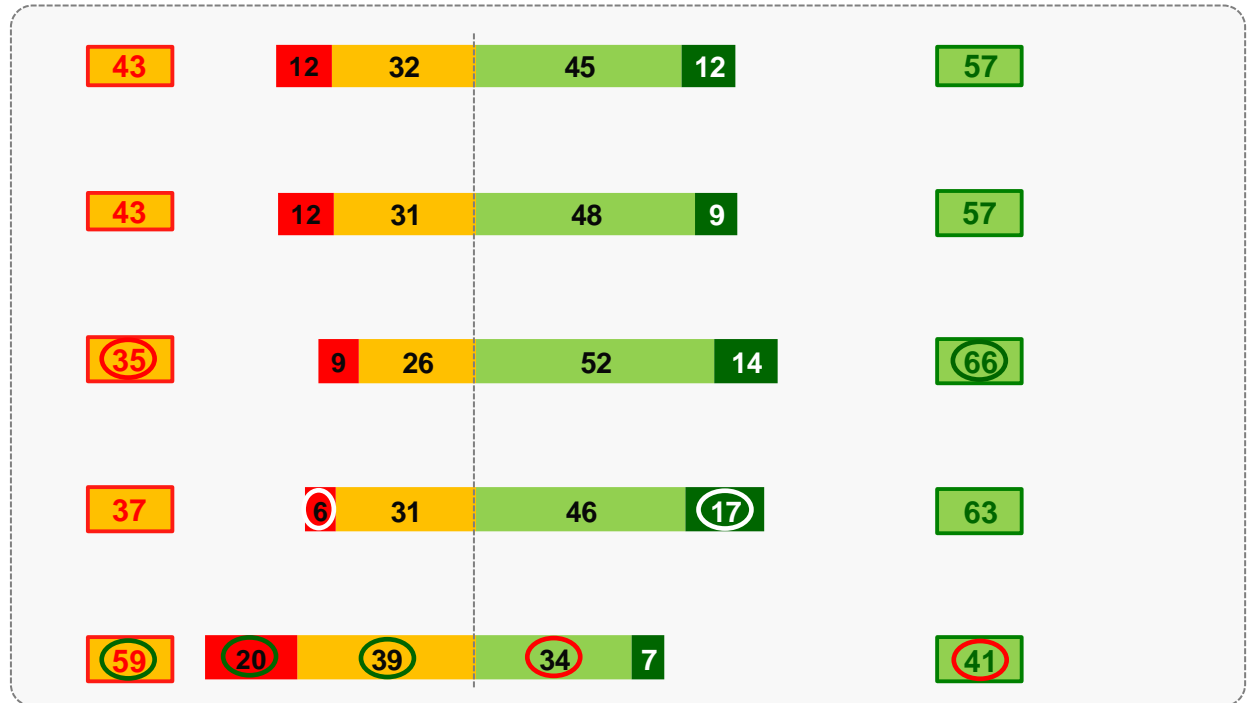
Total

France 

Germany 

Italy 

UK 



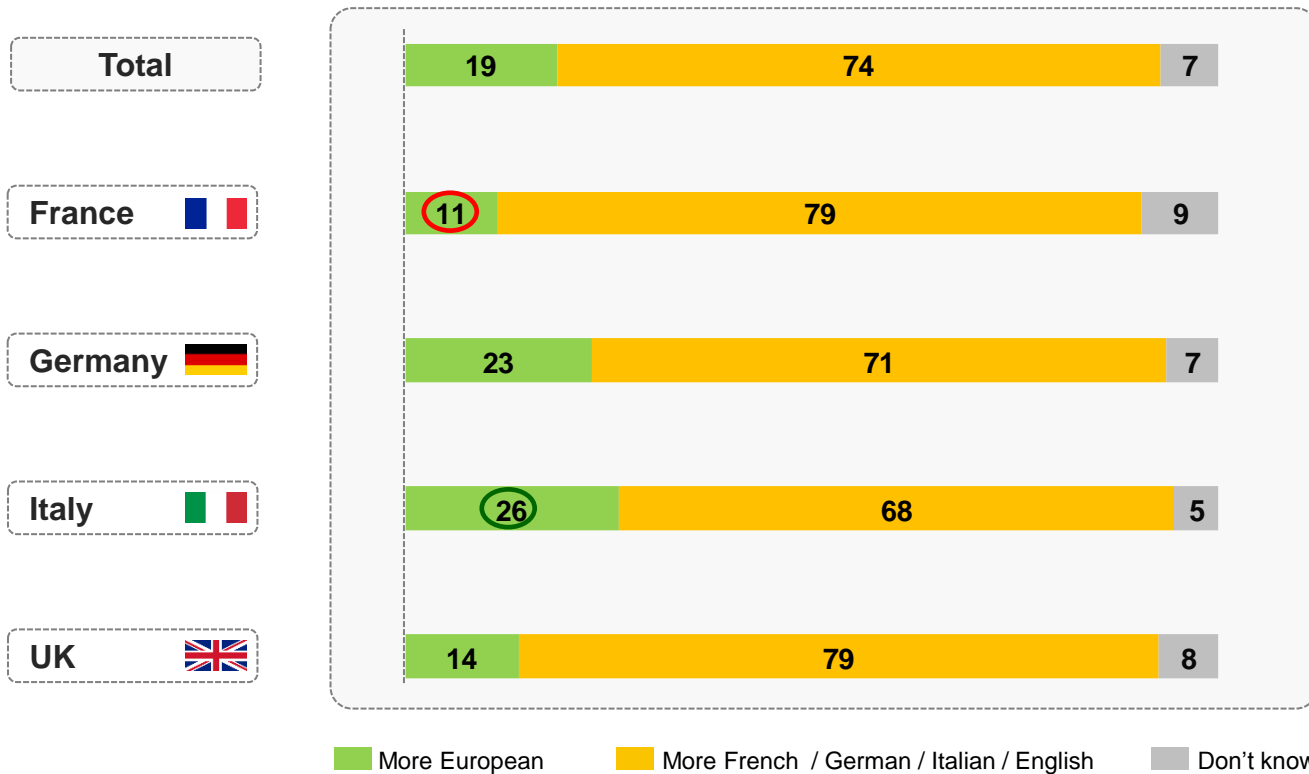
■ Not at all attached
 ■ Not very attached
 ■ Fairly attached
 ■ Very attached

Sense of belonging

Finally, do you currently feel more European or more French / German / Italian / English ?

Basis = 803

In %



Attachment and Sense of Belonging

Synthesis

Attachment to the Europe brand:

European citizens appear attached the Europe brand, as **results are mainly concentrated on the neutral positive codes**. Indeed, **66% of German citizens, 63% of Italian citizens and 57% of French citizens declare a feeling of attachment to the Europe brand**. One again **UK citizens show significantly lower scores**; 41% of the English respondents feeling attached to the Europe brand.

Sense of Belonging:

In terms of sense of belonging, **results are quite negative**. Indeed, **¾ of respondents say that their national identity overrides their European identity**, especially **in France** where only **1 in 10 people said to feel more European** than French. In Germany and in Italy, this tendency is slightly less important but the national identity remains the dominant position.



03

Identity and symbols

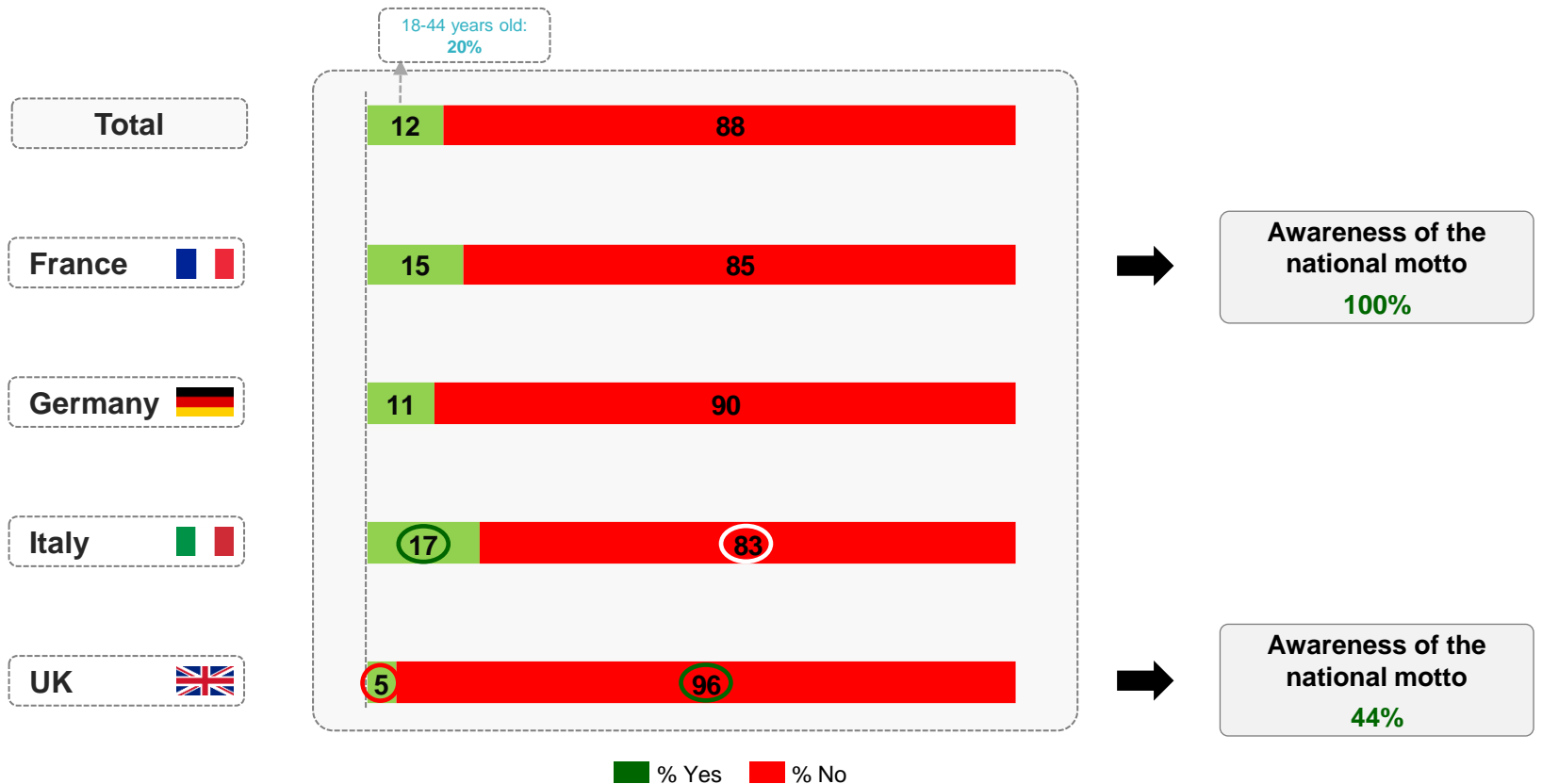
Awareness of the motto

Do you know the motto or catchword of the European Union?

Basis = 803

In %

« United in diversity »



Awareness of the European flag

Do you know the flag that symbolizes the Europe brand?


Basis = 803

In %



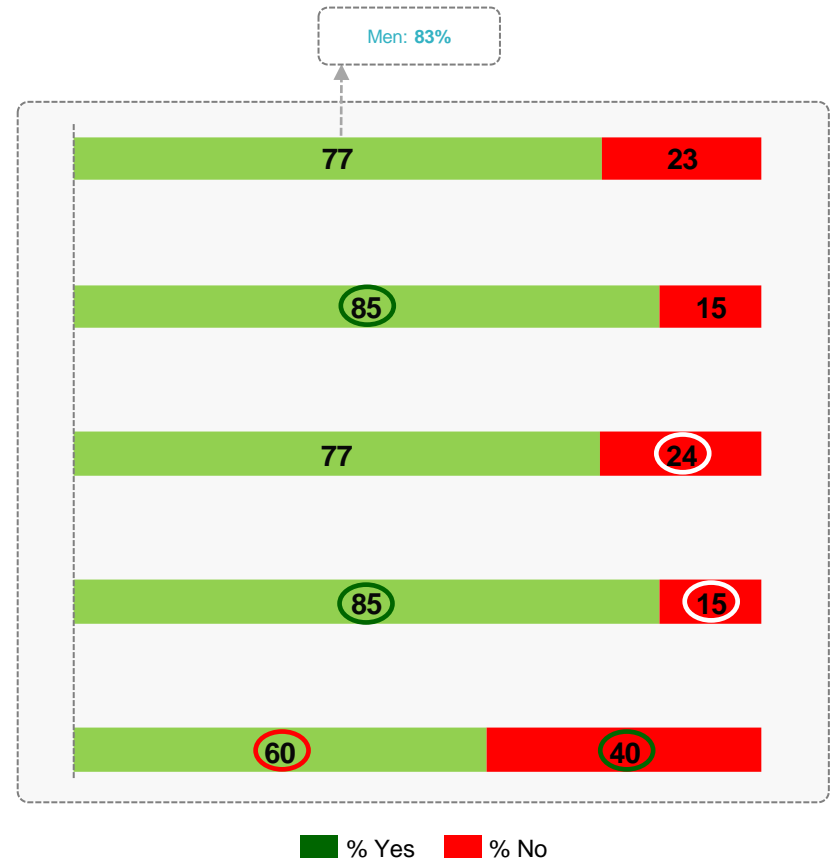
Total

France 

Germany 

Italy 

UK 

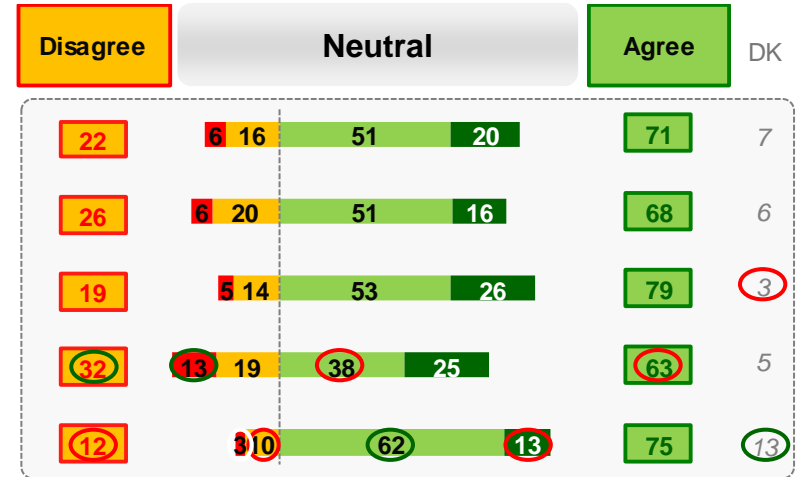
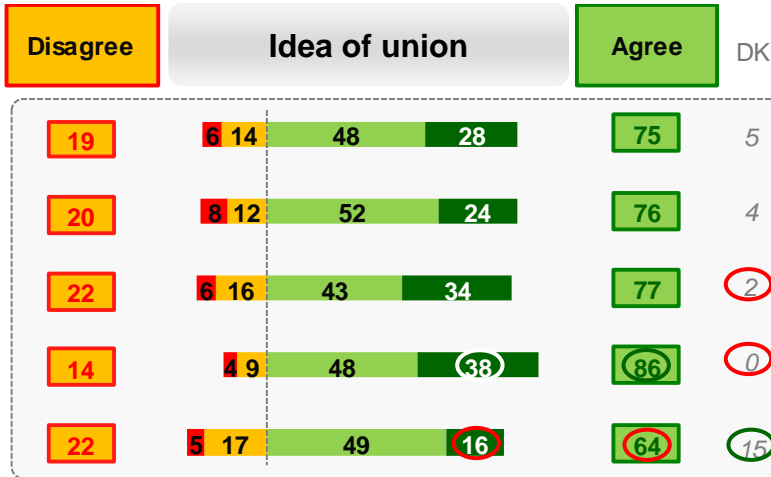


Perceptions of the European flag (1/2)

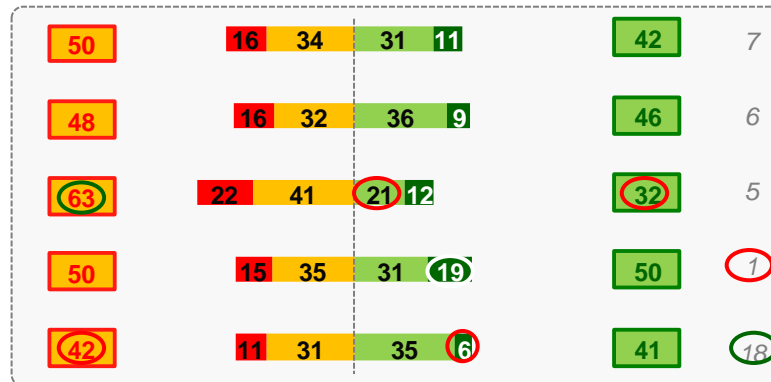
Please state the extent to which you agree with the following statements concerning this flag:

Basis = 803

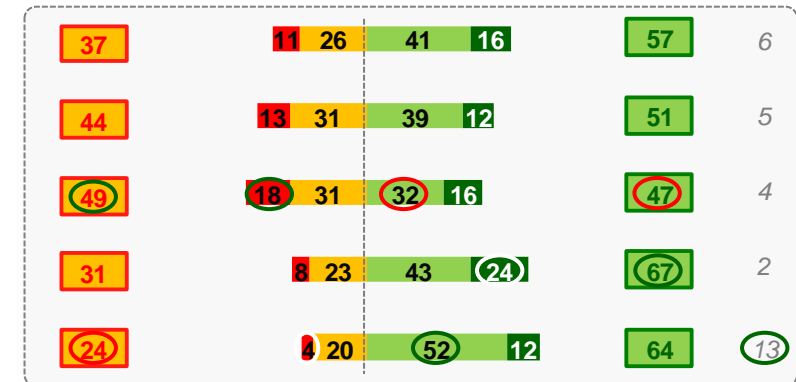
In %



Power



Original



Strongly disagree Disagree Agree Strongly agree

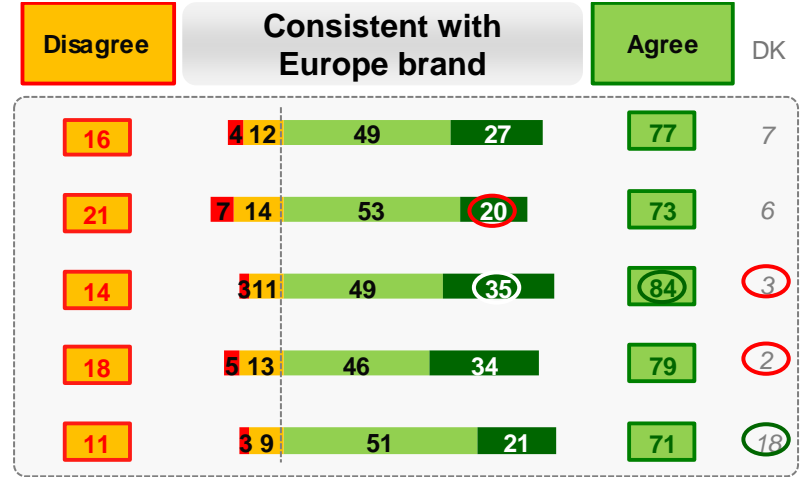
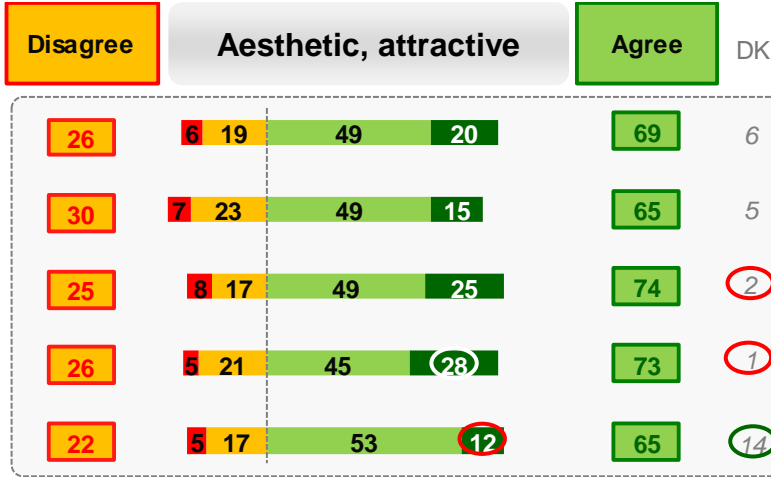
Score significantly higher/lower than the total 24

Perceptions of the European flag (2/2)

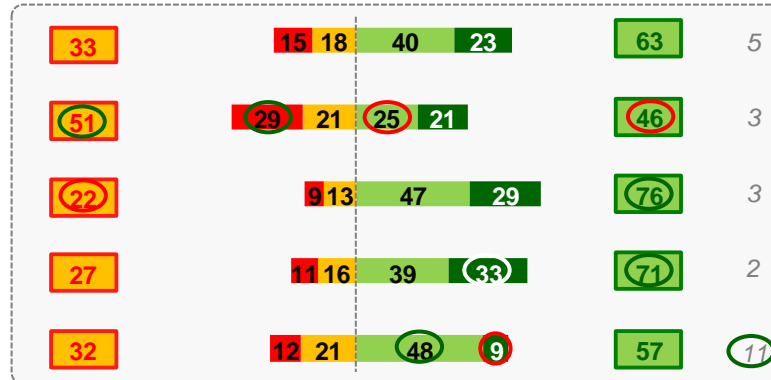
Please state the extent to which you agree with the following statements concerning this flag:

Basis = 803

In %



Number of member countries



Strongly disagree Disagree Agree Strongly agree





Score significantly higher/lower than the total

Perceptions of the European flag

Synthesis - % Agree

Basis = 803

In %

	Total	France 	Germany 	Italy 	UK 
Consistent with Europe brand	77	73	84	79	71
Idea of union	75	76	77	86	64
Neutral	71	68	79	63	75
Aesthetic, attractive	69	65	74	73	65
Number of member countries	63	46	76	71	57
Original	57	51	47	67	64
Power	42	46	32	50	41

Identity and symbols

Synthesis

The European Flag:

The European Flag, recognizable by its circle of 12 gold stars on a deep blue background, **is well known to all citizens**: 85% of Italians and 77% of French and Germans recognize the European flag. **The UK remains an exception**. Indeed, 40% of the British citizens do not recognize the European flag.

In terms of perception of this flag, it is positively evaluated on its ability to evoke the idea of Union, its consistency with the European Union and its aesthetics and attractiveness. It is then perceived as quite neutral and shows low scores on originality and evocations of power.

The European Motto:

The European motto "In varietate concordia", a Latin phrase translated as "United in diversity" **has a much lower rate of awareness than the European flag**. Thus, it is only known by 11% of Germans, 15% French and 17% of Italians. Again the United Kingdom stands out: only 5% of UK know the motto of Europe. More generally it seems to be better known by the younger respondents (20% of recognition among 18-44 years old respondents vs. 12% globally)



04

Personification of the Europe Brand

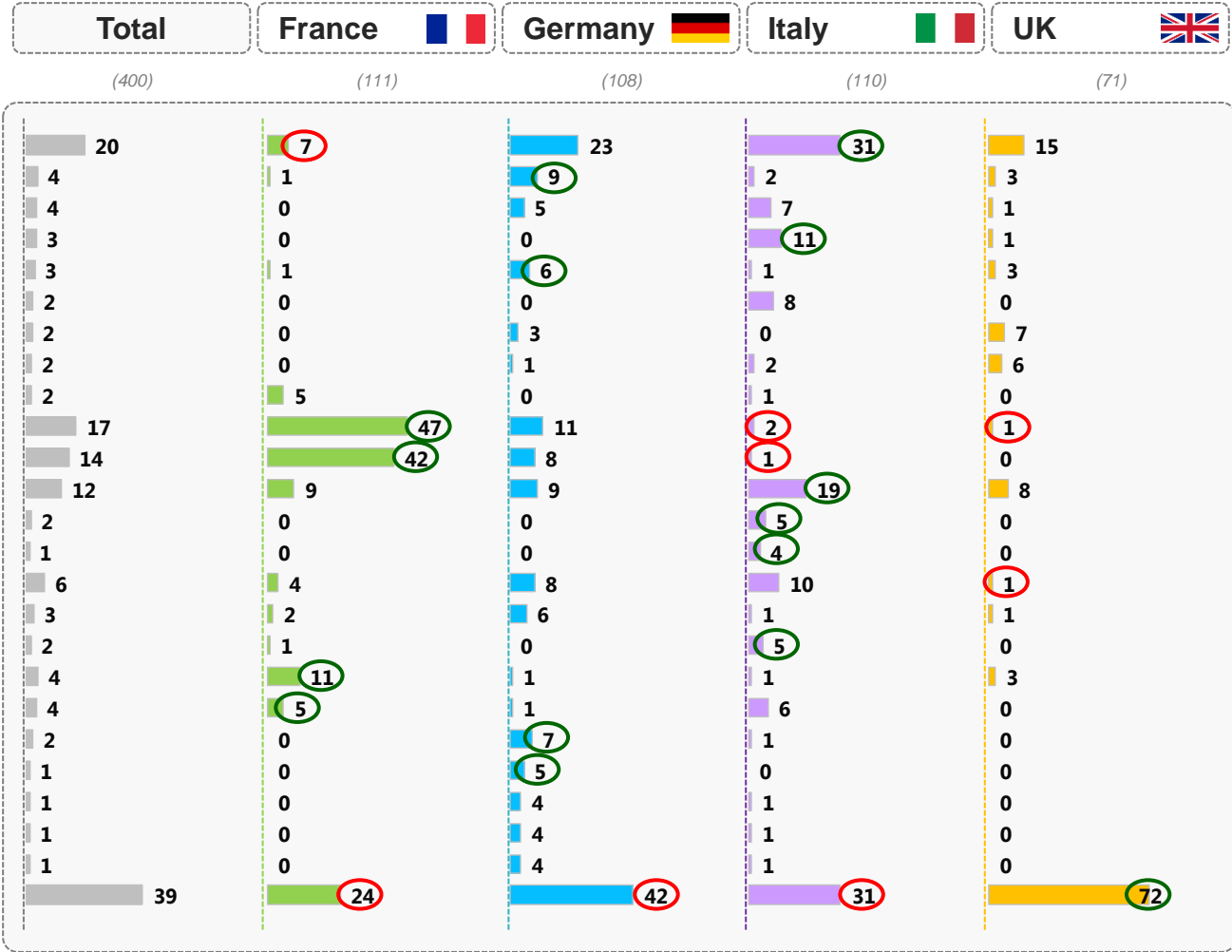
A brand that represents Europe ?

From among all of the commercial trademarks that you know, which in your opinion the most embodies Europe today?



Basis = 400
(without DK / None)

In %



Score significantly higher/lower than the total

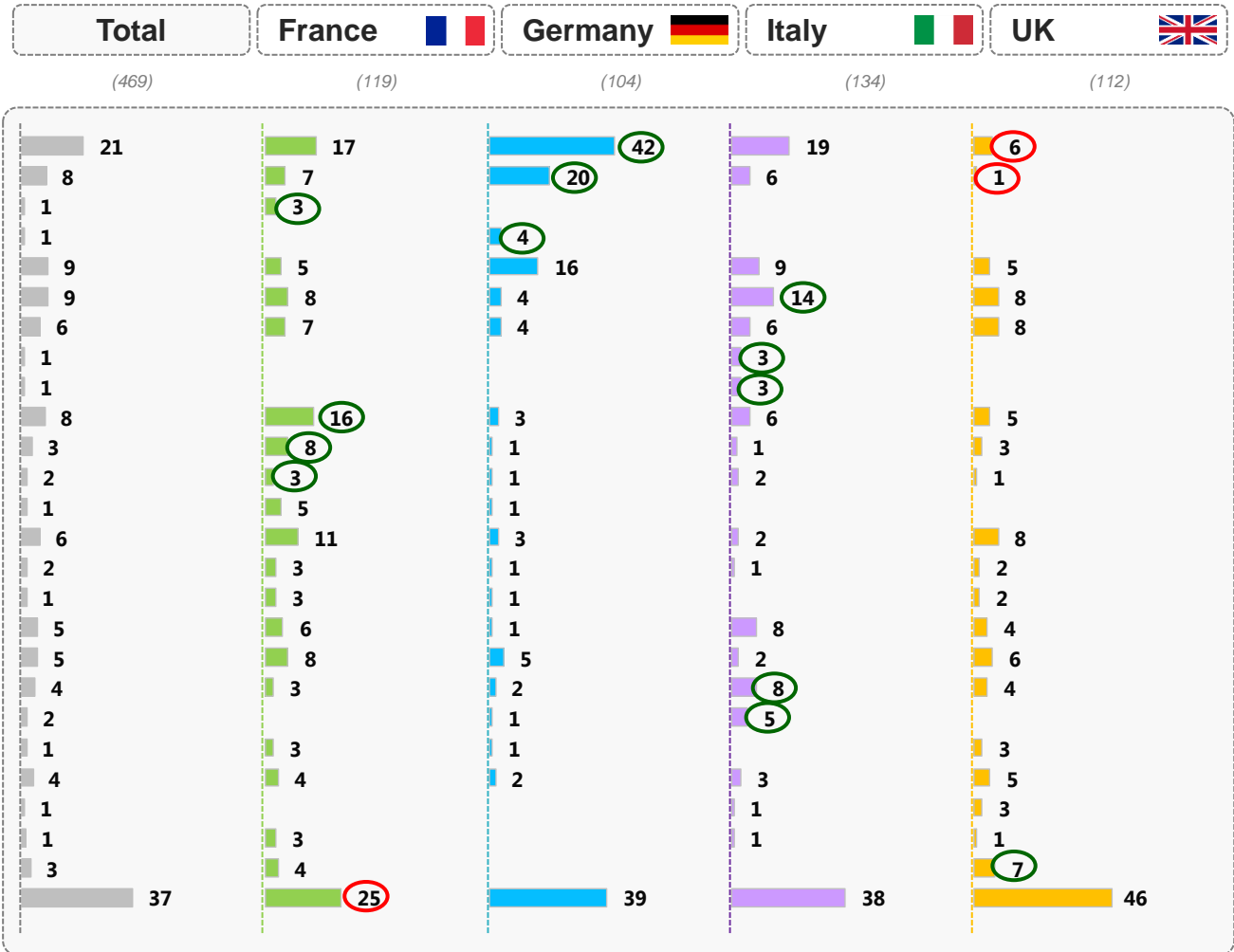
A character that represents Europe ?

If you had to produce an advert for the Europe brand, what real or imaginary character would you use to best represent it?



Basis = 469
(without DK / None)

In %



Personification of the Europe Brand

Synthesis

If the Europe brand were a commercial brand:

As for key sectors, **no trademark names truly embody Europe and each country tends to identify Europe with major national commercial brands**: Volkswagen in Germany, Barilla and Ferrero in Italy. The only exception is Airbus, which is cited by both French and Germans.

If the Europe were to be represented by a personality:

If a person were to embody Europe, **all countries agree that it should be German Chancellor Angela Merkel**. More generally, the Germans tend to quote politicians (Angela Merkel), French, historical figures (Napoleon, De Gaulle), while a number of Italians mentioned the Pope. Nevertheless **results remain relatively fragmented** and it is difficult to get a clear vision of the perceptions of European citizens on this point.



05

Synthesis

Synthesis

In France, Germany, Italy and the UK, **the Europe brand is positively perceived** and the majority of citizens from these countries **feel attached to Europe**.

Taking a closer look, **the Europe brand is positively perceived on human and cultural aspects but shows more negative scores on all performance and competition aspects**. UK citizens show **significantly more negative perceptions** on most of the aspects of the brand in terms of image and attachment.

In the same way, **values attributed to the Europe brand are mainly human values through the triptych Tradition (39%), Liberty (38%), Diplomacy (38%)**. In contrast, **values of competitiveness, dynamism and courage show low levels of citation which confirms the perceived lack of competitiveness of the Europe brand**.

→ **The Europe embodies a lifestyle rather than a logic of performance and competition**

Other than this basis of human values shared by most of the respondents, we observe the absence of a unanimous view. Indeed, **each country has its own Europe brand based on its foundations and national symbols**, tending to reflect its own areas of competence as the key fields of the Europe brand. Germans highlight industry, agriculture and consumer goods while French mention gastronomy, aerospace and luxury goods as the greatest strengths of the Europe brand. In terms of personification, no trademark names truly embody Europe. Indeed, as for key sectors, **each country tends to identify Europe with major national commercial brands**.

→ **Each country has its own vision of the strengths and representative trademarks of the Europe brand. There is one specific Europe brand per country**.

In terms of identity and symbols, the European Flag is well known to all citizens although the UK remains an exception. Indeed, 40% of the British citizens do not recognize the European flag. **In contrast, the European Motto has a much lower rate of awareness, only being known by 1 or 2 people in 10** across investigated countries.

Is there a lack of communication of the Europe brand within member countries? Indeed, countries remain divided on the perception of the brand and its strengths in Europe, and still ignore certain symbols. Would improving the communication and the positioning of Europe be a way to develop the attachment and the sense of belonging of European citizens?