



ANALYSIS OF THE PERCEPTION OF THE EU AND EU'S POLICIES ABROAD

EXECUTIVE SUMMARY

December 7, 2015

The study was requested by the European Commission's Service for Foreign Policy Instruments (FPI) and was implemented in January – November 2015 by the following three partner organisations: the **Public Policy and Management Institute (PPMI)** (the lead partner) based in Vilnius, Lithuania; the **National Centre for Research on Europe (NCRE)**, located at the University of Canterbury in Christchurch, New Zealand; and the **NFG Research Group**, based at Freie Universität Berlin, Germany. The study also drew on the expertise of expert teams based in 10 Strategic Partner countries: Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, and the US. The public opinion poll in the 10 countries was carried out by TNS Global. The social media analysis was carried out by the NCRE with substantive support of the Statistical Cybermetrics Research Group at the University of Wolverhampton, the UK.

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The country expert teams are presented in Annex I.

The study was presented to the Steering Committee on November 12, 2015. It has been revised to reflect ideas discussed during the meeting as well as follow-up suggestions received via email.

The study does not represent the official views of the European Commission.

Table of contents

1	PERCEPTION OF EU AND EU'S POLICES ABROAD: EXECUTIVE SUMMARY	4
1.1	SCOPE AND METHODOLOGY OF THE STUDY	4
1.2	SUMMARY FINDINGS.....	4
2	KEY FINDINGS: COMPARATIVE OVERVIEW	7
2.1	VISIBILITY	7
2.2	ACTORNESS.....	11
2.3	EFFECTIVENESS.....	15
2.4	EU AS A NORMATIVE POWER	19
2.5	EXPLAINING PERCEPTIONS.....	19
2.6	REGIONAL FINDINGS.....	22
3	POLICY RECOMMENDATIONS.....	22
3.1	OVERALL PUBLIC DIPLOMACY STRATEGY AND ITS IMPLEMENTATION	22
3.2	MEDIA AND SOCIAL MEDIA RECOMMENDATIONS.....	23
3.3	SUMMARY OVERVIEW OF COUNTRY-LEVEL RECOMMENDATIONS	24
4	BRAZIL.....	26
5	CANADA.....	42
6	CHINA.....	58
7	INDIA.....	74
8	JAPAN	90
9	MEXICO.....	106
10	RUSSIA.....	122
11	SOUTH AFRICA.....	138
12	SOUTH KOREA	154
13	US.....	170

List of tables

TABLE 1. MOST AND LEAST VISIBLE THEMES OF MEDIA ARTICLES COVERING THE EU AND EUROPE.....	9
TABLE 2. INFLUENCE OF CHARACTERISTICS OF INDIVIDUALS ON POSITIVE/ NEGATIVE PERCEPTION OF THE EU	20

List of figures

FIGURE 1. LACK OF AWARENESS OF THE EU	7
FIGURE 2. FREQUENCY OF GETTING INFORMATION ABOUT THE EU.....	8
FIGURE 3. MAIN SOURCES OF GETTING INFORMATION ABOUT THE EU	8
FIGURE 4. MONTHLY AVERAGE OF MEDIA ARTICLES COVERING THE EU AND EUROPE.....	9
FIGURE 5. THE MOST RECOGNIZABLE EU/ EUROPEAN COUNTRIES, INSTITUTIONS AND PEOPLE	11
FIGURE 6. THE GENERAL VIEW OF THE EU IN VARIOUS SP COUNTRIES	12
FIGURE 7. EVALUATION OF THE SP COUNTRIES' RELATIONSHIP WITH THE EU.....	12
FIGURE 8. DEGREE OF THE EU'S INFLUENCE, IMPORTANCE AND ATTRACTIVENESS IN SP COUNTRIES	13
FIGURE 9. MOST COMMON DESCRIPTORS OF THE EU	14
FIGURE 10. DESIRABILITY VS LIKELIHOOD OF EU LEADERSHIP ROLE IN GLOBAL AFFAIRS	15
FIGURE 11. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF ECONOMY AND RS&T ACROSS SP COUNTRIES	16
FIGURE 12. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF POLITICS AND SECURITY ACROSS SP COUNTRIES	17
FIGURE 13. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF SOCIAL DEVELOPMENT ACROSS SP COUNTRIES.....	17
FIGURE 14. EU EFFECTIVENESS IN DIFFERENT THEMATIC FIELDS OF CULTURE ACROSS SP COUNTRIES.....	18
FIGURE 15. KEY LEVELS AND FACTORS FOR EXPLAINING PERCEPTIONS.....	19

1 PERCEPTION OF EU AND EU'S POLICES ABROAD: EXECUTIVE SUMMARY

1.1 Scope and methodology of the study

This study presents an in-depth, multi-method analysis of the perceptions of the EU and Europe in several regions of the world (North America, Latin America and the Caribbean, Asia) with a specific focus on the EU's Strategic Partner (SP) countries: Brazil, Canada, China, India, Japan, Mexico, Russia, South Africa, South Korea, and the US.¹ The study explored the perception of both the EU and Europe, because in popular and professional discourse the two are often intertwined. The study was designed to contribute to EU Public Diplomacy outreach activities, so that messages and themes could be fine-tuned to local conditions, facilitating a more meaningful and effective EU engagement globally. It is part of a broader effort undertaken by the Commission in revisiting EU's Public Diplomacy which includes, among others, the development of the EU Global Strategy, rethinking of the EU narrative, as well as the Preparatory Action 'Culture in EU External Relations'.

The research team developed an analytical framework consisting of the research criteria, target groups, main themes as well as explanatory variables. The study addressed the research criteria of visibility (including awareness), actorness, effectiveness, local resonance and discussed the EU/ Europe as a norm-setter. The key themes and sub-themes included: economy, trade, politics and security, internal social development and international aid, culture, education, migration and multiculturalism, environment and energy, research, science and technology. Among the target groups/ audiences considered in the study were youth, business, policy makers, academia and think tanks, civil society and media. Finally, the team considered various explanatory factors, from global (geopolitical context, economic interdependence), to country-level (culture, history, political system) and individual-level variables (age, gender, contact with Europe and others).

Methodologically the study followed a research design that consisted of several building blocks: 1) an extensive literature review; 2) media analysis of three selected newspapers in each SP country during April-June 2015; 3) social media analysis around three EU-related events in 2015; 4) public opinion poll in each SP country (in official languages; two languages in Canada and multiple languages in India, fieldwork in August 2015) and 5) non-representative elite interviews carried out in May-July 2015 that helped to discover local explanations for the main findings.

1.2 Summary findings

Visibility analysis showed that the general public in the US, Canada and Japan tends to hear about the EU less frequently as compared to the other SP countries, such as China, Brazil and, in particular Russia. TV was the most popular channel of EU news across most countries, followed by online media (which likely includes online versions of newspapers and magazines), print media and social media. Economy has been the most visible theme in print media, followed by

¹ At the time of writing the European Union had official strategic partnerships with 10 countries; this status entails holding regular meetings at the heads of state level and undertaking numerous other activities encompassing trade, politics and culture.

political, social (including migration) and cultural issues. Media reports on the EU/ Europe focused mostly on dramatic events and crises, such as the European sovereign debt crisis and (the threat of) Grexit, elections in the UK and (the threat of) Brexit as well as the migration/refugee crisis. Notably, there were very few media reports concerning EU's intentions and actions in fields such as research, science, technology, environment and education. EU's role in international development has also been mostly invisible despite the EU being the world's biggest donor. While the media focus on dramatic and current events is understandable, this presents a problem for Public Diplomacy, as the EU is frequently seen as mired in and reacting to crises, while its longer-term efforts are barely noticed.

We used the **actorness** criteria to discuss what kind of actor the EU is perceived to be: whether it's seen as active, important, influential or not so. The majority of public opinion survey respondents across the SP countries had an overall positive view of the EU and described the relationship between their country and the EU as good or very good, with a notable exception of Russia, where negative perceptions were reported, possibly in relation to Russia's role in the Ukrainian conflict, EU's reaction to its annexation of Crimea and the ensuing economic sanctions. Across various themes from global economic affairs to climate change and technological progress, the EU was mostly assessed as somewhat or very influential or important. There was also a tendency for less positive answers in Russia and, to a lesser extent, in Japan. The data shows that in terms of influence and importance, the EU is usually perceived as falling behind the US, the UN and, in the case of bigger global player countries, the respondents' own country, yet in many cases it is rated higher than other big countries and international organisations.

Public opinion survey results show that EU countries are seen as somewhat to very attractive in terms of their **culture and lifestyle** (around 70-80 per cent of responses in all SP countries, including Russia). Indeed, as affirmed by other sources used in this study as well as previous research such as the Preparatory Action 'Culture in EU External Relations', European culture is an influential point of attraction for, and in demand by stakeholders across the world that highly value Europe's cultural diversity.

Survey respondents were also asked to choose words that they felt best describe the EU. **'Multicultural'** was the adjective chosen most frequently across the sample countries; it ranked first in the US, Canada, China, Mexico and Japan; second in Russia; third in Brazil, South Korea and South Africa. A more detailed statistical analysis showed that multicultural may be understood both in a positive and a negative way – it means that this word was used both by respondents more likely to choose positive descriptors as well as those likely to opt for the negative. Among the other adjectives, 'modern' and 'strong' were commonly associated with the EU as well.

Effectiveness is linked to actorness but goes a step further and asks more specifically whether the EU is perceived as being successful/ performing well in specific fields and on specific issues. Survey respondents agreed that the EU is an important trade partner for their countries and overall was performing fairly well on global trade; tourism was seen as an economic field where the EU performs best, while respondents were relatively more sceptical with regards to the EU's success in space exploration technologies and agriculture. In **politics and security**, the EU's performance on media freedom as well as justice and rule of law received relatively more positive assessments, while its support to developing countries and dealing with refugees/displaced people was viewed relatively less positively. In **social development**, the EU was seen as performing well on its overall quality of life, level of education as well as equality between men and women. However, EU's performance on integration of refugees (and displaced people) as

well as protection of minorities, eradication of poverty and reduction of income inequalities was seen less positively. In the broad realm of **culture**, respondents rated all relevant areas positively and in particular the EU's/ European monuments and museums, history, arts, luxury goods and clothes. Indeed, analysis of various survey questions and other sources suggests higher appreciation among the SP countries of the historical facets of the EU (monuments, history, all types of art) rather than the modern.

Despite the vivid academic discourse, the EU was rarely seen as a **norm setter** across the building blocks of the public opinion survey, media analysis and elite interviews. The EU was perceived as an international norm setter in few areas, such as renewable energy technology, equality between women and men and gay rights. Interviewees expressed doubts about the applicability of EU norms in their respective local contexts.

We identified **explanatory variables** at various levels that may explain perceptions in the SP countries. These are, in particular individual/ socio-economic characteristics, country-level characteristics such as cultural and historic ties to Europe, as well as global factors. **Age** seems to matter in various countries, with younger respondents holding somewhat more positive views on the EU in Canada, India, the US and South Africa, while older people tend to have more positive perceptions in Brazil, China, Japan, Mexico, Russia and South Korea. **Gender** tends to have some influence on responses, with women apparently less aware about and/ or having more negative views in most SP countries. Income, working status and level of education also tends to have some (albeit weak) influence on responses. Meanwhile, people with **contact with Europe** (having lived, visited or with relatives living in the EU) usually have more positive attitudes as well as those who felt sufficiently informed about the EU.

History plays out very differently in the SP countries: while there is evidence that common historical ties increase mutual understanding and encourage cooperation, the countries with legacy of European colonialism may also see it as an obstacle. While the distinctiveness of **cultural/ social norms** can lead to clashes and conflicts, for instance on human rights (China) or data protection (US), a common cultural heritage can also enhance the willingness to cooperate in various areas ranging from culture, to education and trade (Canada, Mexico). **Political systems** in China and Russia make it difficult to find a common ground with the EU on issues such as democracy and human rights. **Geopolitics** and **economic interdependence** matter too. For example, the US media portrays the EU as an important partner, and Europe as a crucial continent to keep unpredictable Russia under control. In Russian media, the EU is presented as a close 'other' able to impact Russia politically and economically, not least because of the close (albeit strained) economic relations.

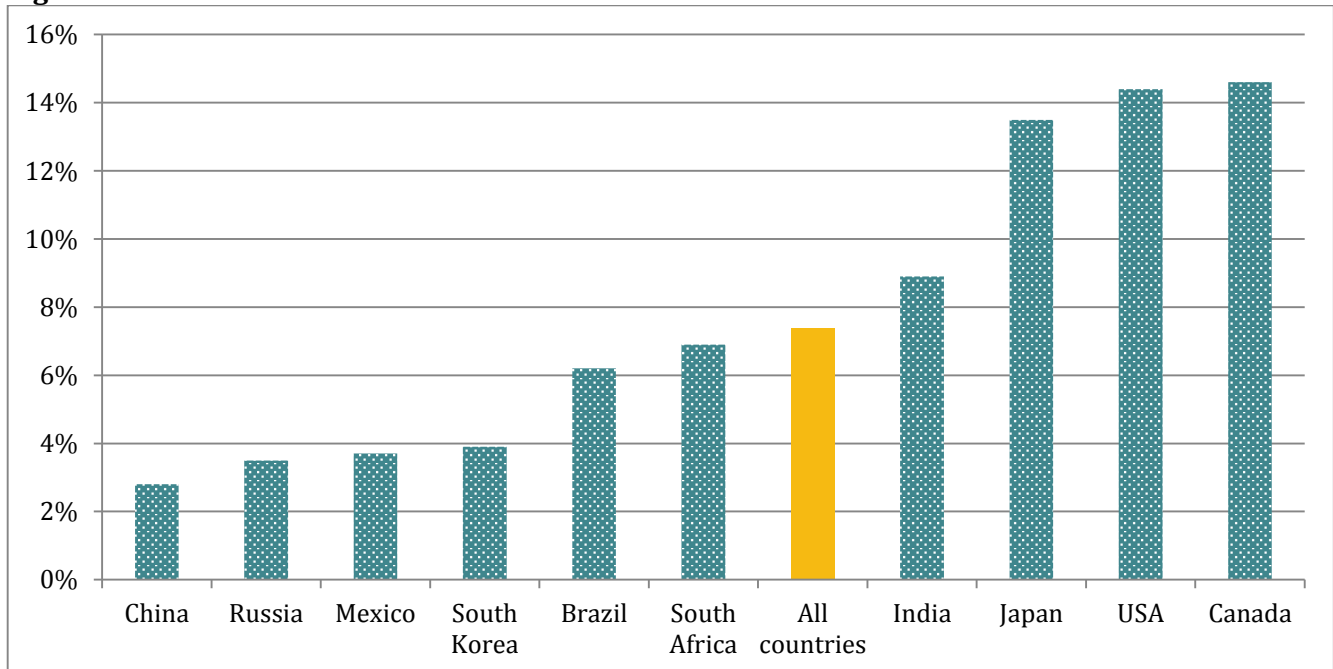
The study **recommends** developing a centralised EU Public Diplomacy strategy comprising a finite set of core messages with the implementation adjusted to local specificities, context and capacities. At the SP level, the EU should devise location-specific media outreach programmes based on messages with a 'local hook', engage in a stratified dialogue with different audiences, address perception of the EU having a 'hearing problem', encourage the development of personal links with the EU and strive for better synergies of PD efforts with the Member States. The decision remains with the policy makers whether to focus on the perceived strengths or weaknesses of the EU as identified in this study as well as to pick out the target groups and audiences to work with. A core target group should be the youth, with a special focus on potential future decision-makers.

2 KEY FINDINGS: COMPARATIVE OVERVIEW

2.1 Visibility

In the public opinion survey we used the percentage of people who do not know/ cannot answer questions about the EU as a useful proxy for awareness. Thus, for example, 2.8 to 14.6 per cent of respondents across SP countries could not answer the question on how positive, neutral or negative they feel about the EU, with the lowest awareness registered in Canada, the US and Japan (Figure 1); the same tendency among countries was noticeable when examining other questions. We also asked survey respondents to express their opinions with regard to other big countries (the US, China, Russia and others) and organisations (the UN, NATO, NAFTA and others). The data shows that in general, awareness of the EU is lower than that of other countries but higher if compared to other international organisations, with an exception of the UN.

Figure 1. Lack of awareness of the EU

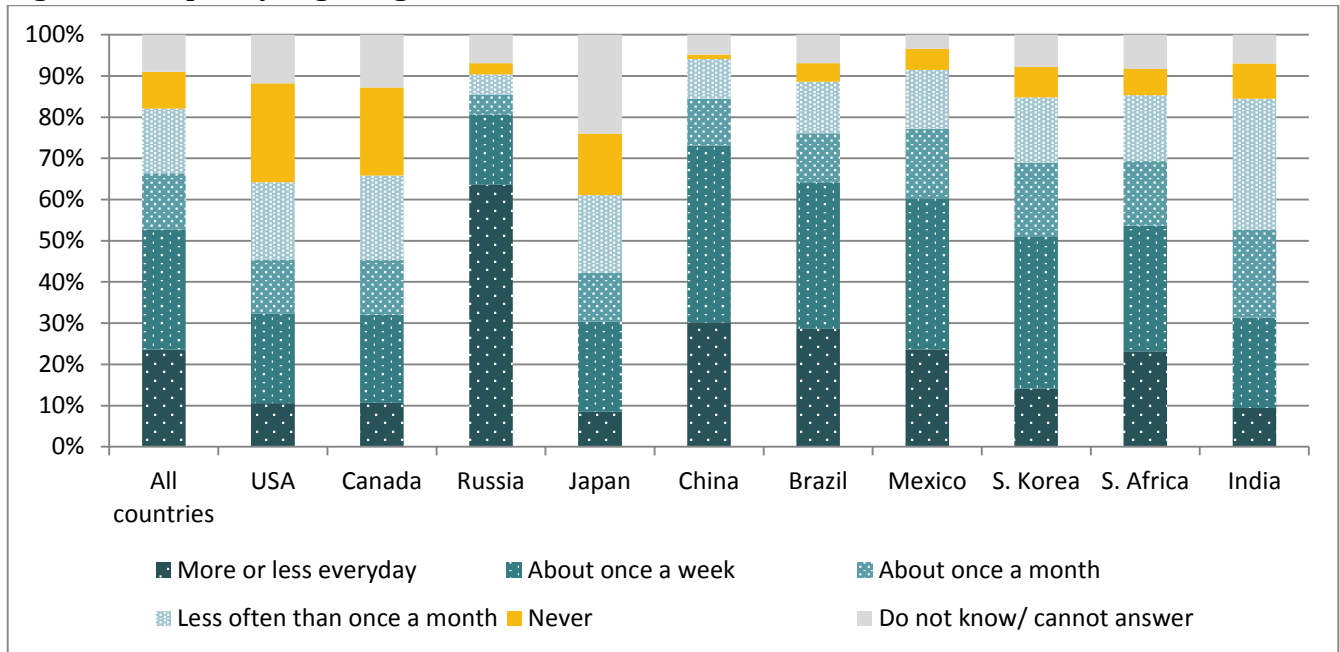


Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations?

Alternatively, awareness and visibility can be measured by looking at the frequency with which the general public across SP countries get information about the EU. Based on this measure, EU's visibility is again lowest in the US, Canada and Japan (Figure 2). Meanwhile, the general public in Russia, China and Brazil hear about the EU quite frequently.

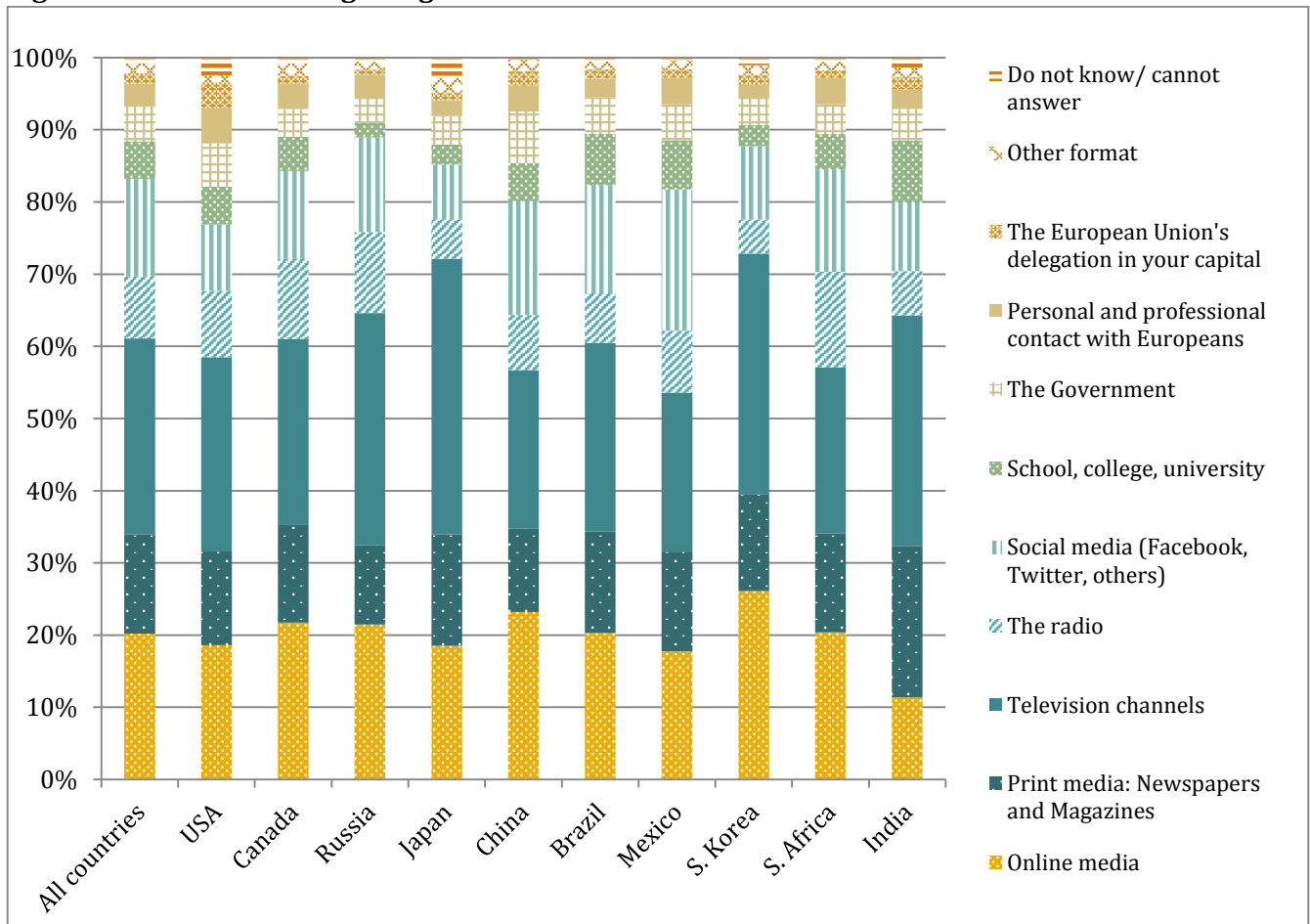
Regarding the key channels of information, TV was the most popular channel of EU news across most countries, followed by online media (which likely includes online versions of newspapers and magazines), print media and social media. Other forms of information were less important (Figure 3). In the US, Canada and South Korea, the top three information sources were TV, online and print; in Brazil, Russia and South Africa – TV, online, social media.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth...

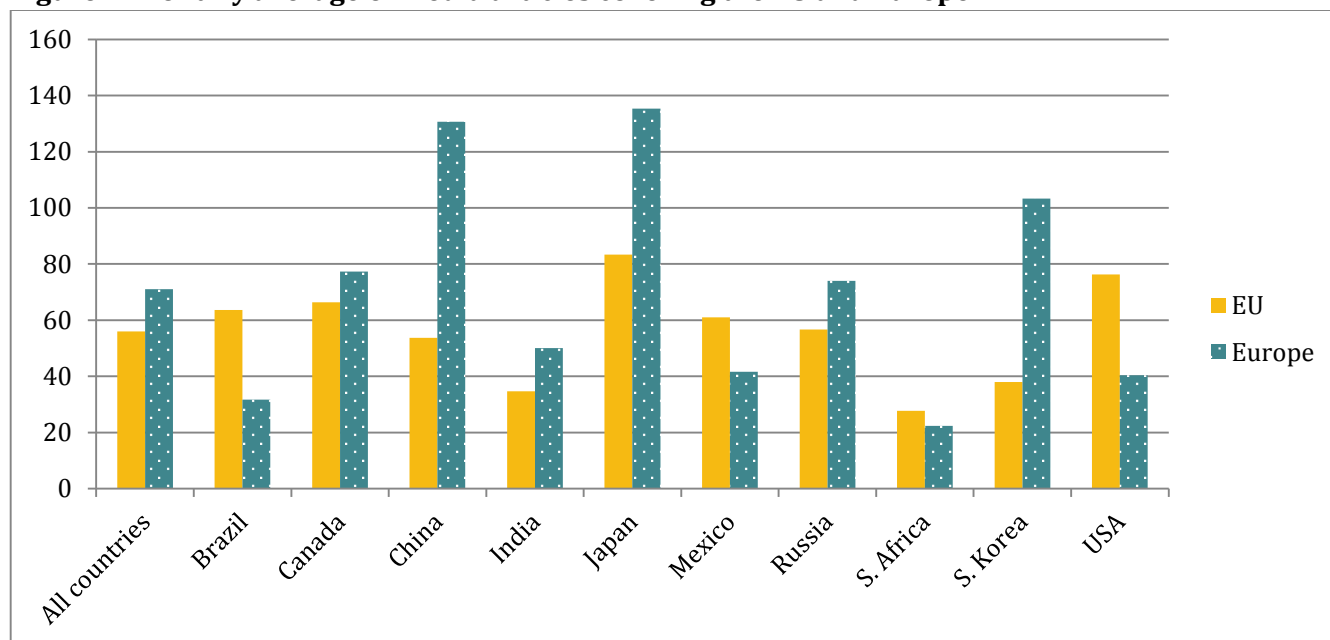
Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole?

Turning specifically to **media analysis**, several **patterns** of EU's visibility have been identified, based on article length, placement of the EU, degree of centrality, and visual support: 1) pronounced visibility (US and South Korea); (2) heightened visibility (Brazil, Mexico, South Africa and India); 3) partial but local visibility (China, Russia, Japan) and 4) nominal visibility (India and Canada). The **highest volume** of media articles has been detected in Japan, US, Canada and Brazil (Figure 4). This does not resonate with the awareness/ visibility data as presented above, which can be explained by the fact that our media analysis focussed on three respected (elite) newspapers, while TV has been the key channel on EU-related news for the general public in most countries.

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on selected print media outlets in target countries during the period April-June, 2015.

Economy has been the most visible theme in print media in most Strategic Partner countries, followed by political, social (including migration) and cultural issues (Table 1). Only in the US, Japan and Mexico, politics was a more visible frame than the economy. In comparison, in **social media**, politics, society and culture were the main thematic frames – which is clearly linked to the events selected for analysis: Europe Day, the G7 meeting in June and the EU Summit in June.

Table 1. Most and least visible themes of media articles covering the EU and Europe

	Brazil	Canada	China	India	Japan	Mexico	Russia	S. Africa	S. Korea	USA
EU										
1	Economy	Economy	Economy	Economy	Politics	Politics	Economy	Economy	Economy	Politics
2	Politics	Politics	Politics	Politics	Economy	Economy	Politics	Politics	Politics	Economy
3	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Normative	Soc&Cult	Energy	Soc&Cult	Soc&Cult	Soc&Cult
Europe										
1	Economy	Economy	Economy	Economy	Economy	Economy	Soc&Cult	Economy	Economy	Politics
2	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Soc&Cult	Economy	Soc&Cult	Soc&Cult	Economy
3	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Politics	Soc&Cult

Note: Based on selected print media outlets in target countries during the period April-June, 2015

Media reports on the EU/ Europe focussed mostly on **dramatic events and crises**, such as the European sovereign debt crisis and (the threat of) Grexit, elections in the UK and (the threat of) Brexit as well as the migration/ refugee crisis. Issues related to negotiating Foreign Trade Agreement (FTA) agreements were also noticed in the media (Canada, Japan, South Korea and the US) as well as high level visits and events, such as the EU-China Summit, Federica Mogherini's visit to Beijing, the EU-CELAC Summit. The most frequently reported topics of EU's external engagement focused on it acting towards global hot spots: Ukraine, Russia and Iran (for example, in Canada, the US, Brazil, Mexico, China, South Africa, Korea and Japan). Importantly, media in each location has its own 'hierarchy' of hot spots reflecting the national contexts and geo-politics.

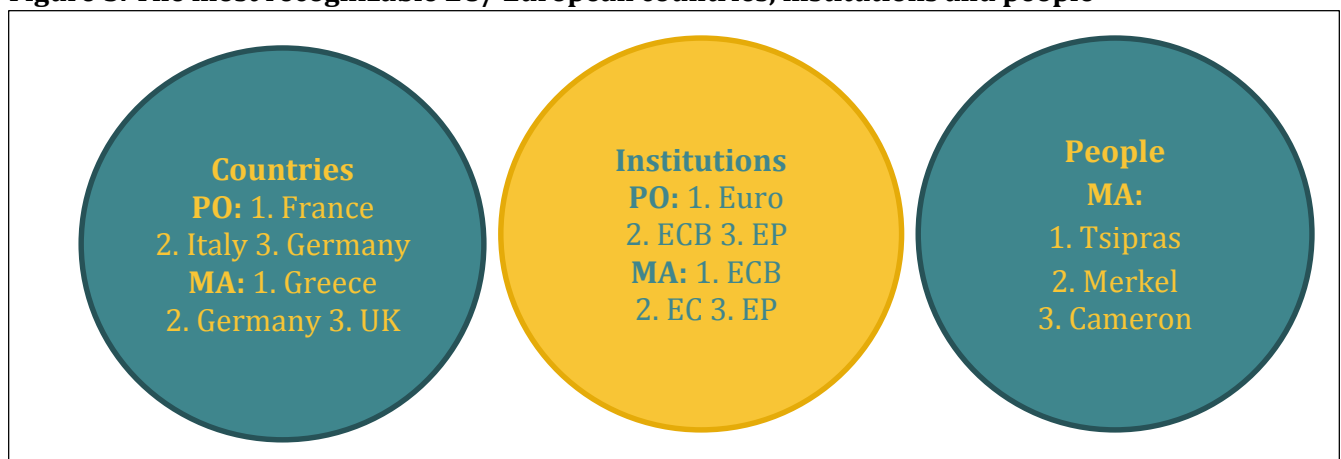
Notably, there were very few media reports concerning the EU's intentions and actions in fields such as **research, science, technology, environment** and **education**. EU's role in **international development** was also mostly invisible despite of the EU being the major global donor. **Energy** attracted more media attention only in Russia – due to both its economic and political importance to bilateral relations. While the media focus on dramatic and current events is understandable, this presents a problem for Public Diplomacy as the EU is frequently presented as mired in, and reacting to crises while its longer-term efforts are barely noticed. As demonstrated by the interviews, only a narrow circle of interested experts, professionals, academics and civic society leaders feel informed about EU involvement in these fields and can comment on it.

While the terms Europe and the EU are sometimes used as synonyms, both media analysis and the public opinion survey also revealed some **distinct patterns**. Specifically, the EU is primarily associated with political, economic (in particular, the state of the economy) and social (including migration, refugees) spheres. Meanwhile, Europe is connected more with history, used as a geographical reference for economic activity, travel and tourism, social development, lifestyle, arts, sports and science. Overall, media portrayed Europe with a higher visibility in **cultural affairs** than the EU. In all SP countries Europe was seen with reference to art and culture both in terms of popular and high culture – articles covered European rock bands, classical music, movies, literature, exhibitions, architecture, performers, artists, etc. This visibility, while not unexpected, confirmed the assumption that Europe exhibits a globally recognised cultural reputation. In China and South Korea, for example, a significant share of Europe's positive coverage referred to European culture (film, cuisine, architecture).

In the media, the most visible Member States were Greece, Germany, Britain and France – due to the major events unfolding in these countries during the period of observation (including the commemoration of WWI and WWII in France). Meanwhile, in the public opinion survey, which shows more long-term and deep-seated perceptions, respondents were asked to name countries that are the most attractive to them. SP country general publics pointed predominantly towards the big, powerful, wealthy countries with history of bilateral cooperation, conflict and, frequently, colonialism: France, Germany, Italy, Britain and to a lesser extent – Portugal and Spain. The most visible EU institutions in the media were the ECB and the European Commission (EC). This corresponds to the survey data where respondents most frequently mentioned that they have seen, heard or read about the Euro, the ECB and the EC. Most survey respondents also mentioned hearing about the European Parliament (EP) (exceptions: India, Canada, the US and Japan) although based on the media data it was rarely in the spotlight during the period of observation (Figure 5).

The most visible **EU officials** in the media were Mario Draghi (President of the ECB, in particular in the revolving reportage of the Greek economic crisis), Jean-Claude Juncker (President of the European Commission) and Donald Tusk (President of the European Council). EU Competition Commissioner Margrethe Vestager had a heightened profile due to what was perceived as her tough stance towards Google. Similarly, EU High Representative Federica Mogherini gained a noticeable profile in relation to news reports concerning the migration crisis. The respective leaders of the most visible (in the media) Member States: Angela Merkel, Aléxis Tsípras, François Hollande and David Cameron received substantial profiling in news stories, and this visibility was enhanced by supporting visual images.

Figure 5. The most recognizable EU/ European countries, institutions and people



Note: Based on selected print media outlets in target countries during the period April-June, 2015.

2.2 Actorness

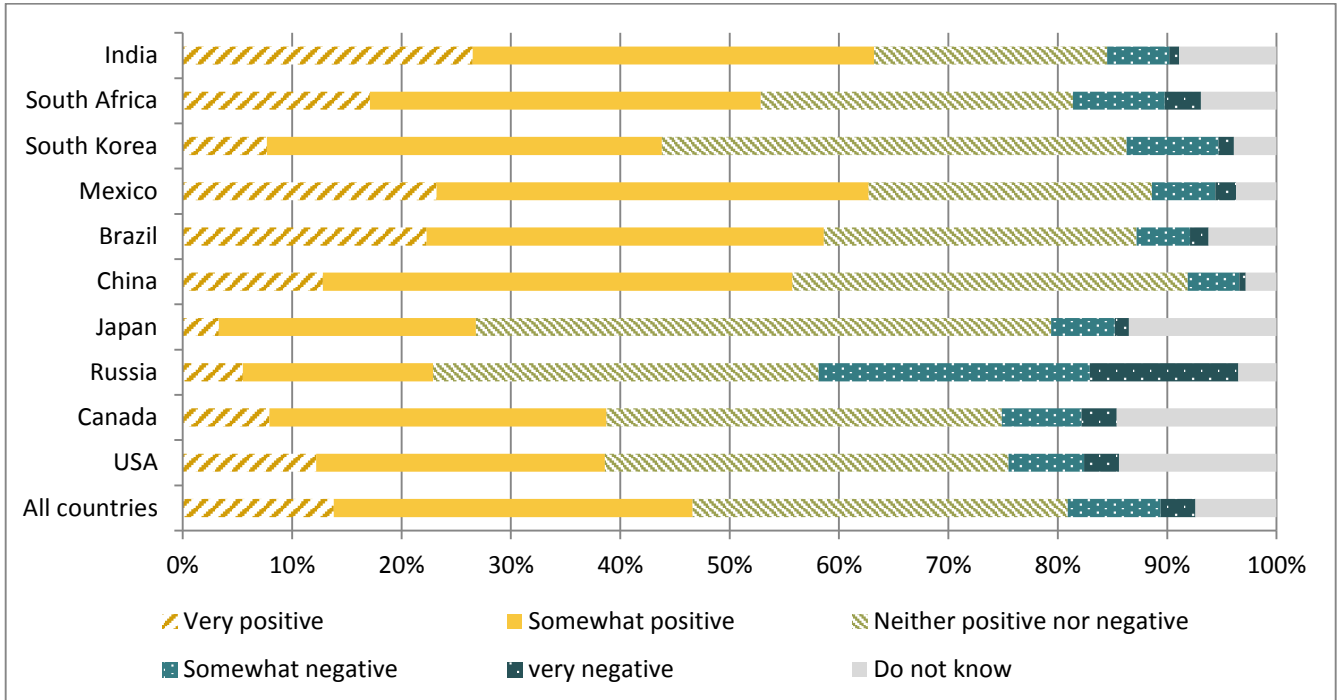
We used the actorness criteria to discuss what kind of actor the EU is perceived to be: active, important and influential or not so.

The majority public opinion survey respondents across SP countries had an overall **positive view** of the EU, except for Russia, where only 23 per cent of respondents felt positive or very positive about the EU, and more respondents felt negative than positive (Figure 6). Furthermore, most respondents described the **overall relationship** between their country and the EU as good or very good, with once again a notable exception of Russia, where negative perceptions were reported, possibly due to Russia's role in the Ukrainian conflict, EU's reaction to its annexation of Crimea, and the ensuing economic sanctions (Figure 7). In Japan, South Korea and South Africa, there were relatively fewer positive views (around 40 per cent), due to much more people choosing neutral 'neither good, nor bad' rather than negative answers. Interestingly, the general public in Canada and the US evaluates bilateral relations between their respective countries and the EU much more positively than the EU in general. The opposite is true in Mexico, Russia and South Africa.

We also analysed **thematic trends**, asking how influential or important or attractive the EU is in various fields, from global economic affairs and global peace to climate change, culture, support to developing countries and technological progress (Figure 8). The trend was the same: most respondents in all SP countries provided positive answers; there was also a tendency for less positive answers in Russia, and, to a lesser extent, in Japan. Respondents were also asked to

answer similar questions with regard other major powers and key international organisations. The data shows that the EU is usually perceived as falling behind the US, the UN and, in the case of larger global players, the respondents' own country, yet in many cases it's rated higher than other big countries and international organisations.

Figure 6. The general view of the EU in various SP countries



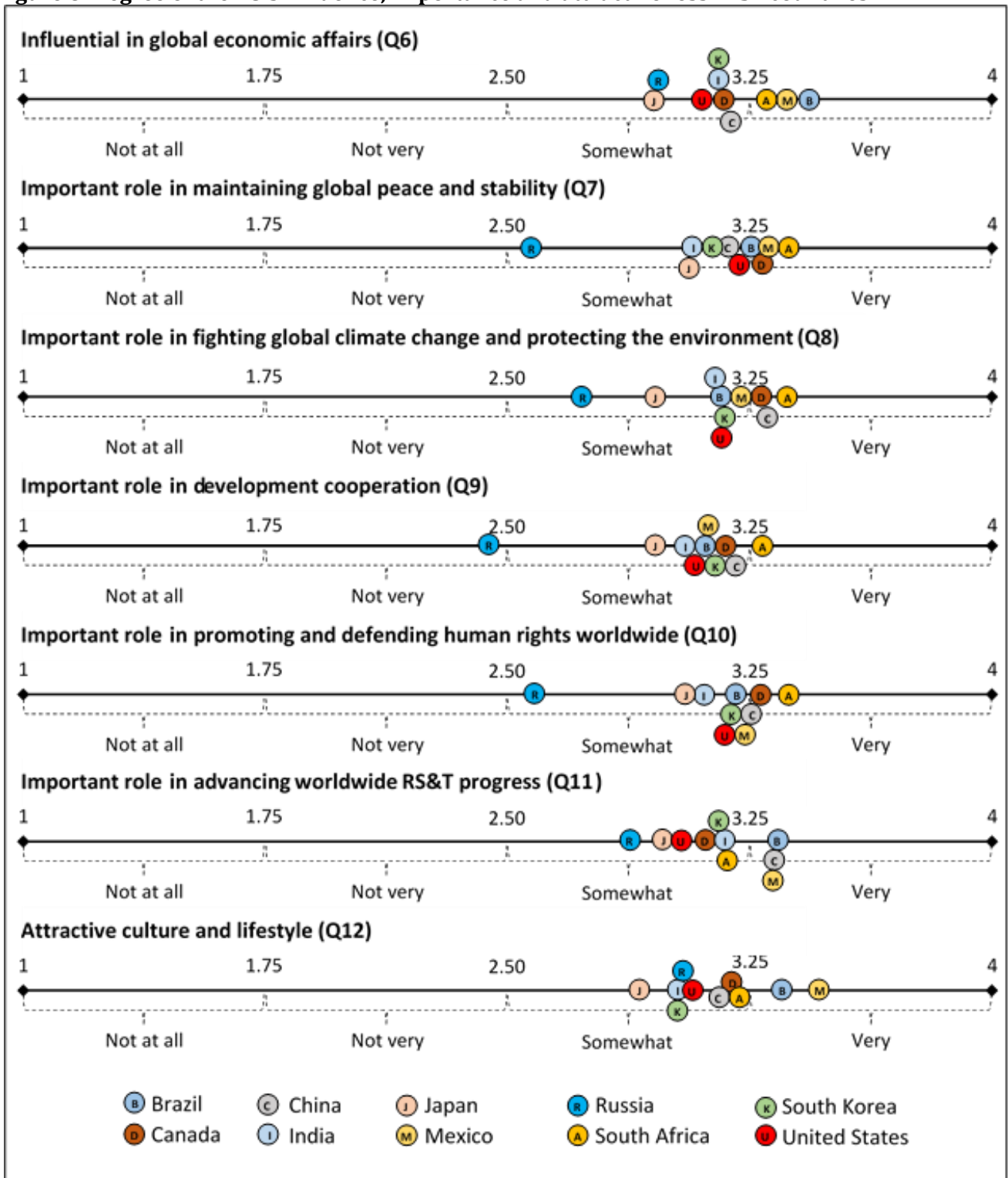
Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations?

Figure 7. Evaluation of the SP countries' relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations?

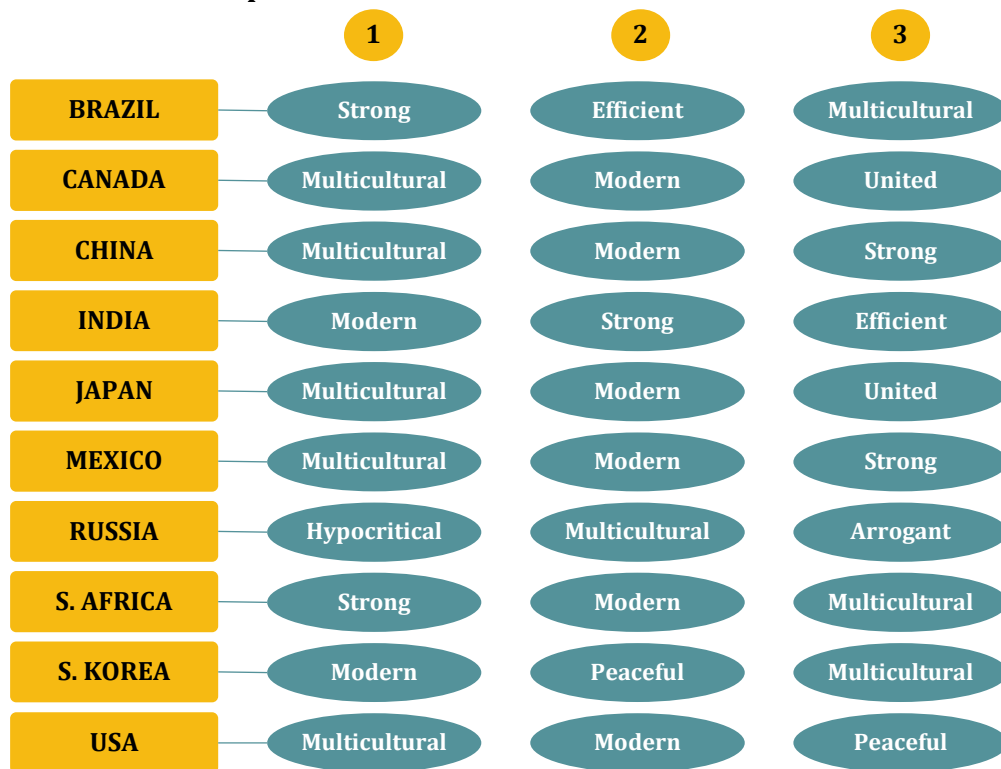
Figure 8. Degree of the EU's influence, importance and attractiveness in SP countries



Note: Based on the answers to survey Q 6-12. The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations: [the EU] Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability: [the EU] Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment: [the EU] Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world: [the EU] Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity: [the EU] Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world: [the EU] Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle: [the EU].

Public opinion survey respondents were also asked to choose words that they felt best describe the EU. **'Multicultural'** was the adjective chosen most frequently across countries; it ranked first in the US, Canada, China, Mexico and Japan; second in Russia; third in Brazil, South Korea and South Africa. Interestingly, Latent Class Analysis showed that multicultural may be understood both in a positive and negative way – it means that this word was used both by respondents more likely to choose positive descriptors as well as those likely to opt for negative ones. Among other adjectives, **'modern'** and **'strong'** were commonly associated with the EU. Interestingly, the EU was not seen as modern in either Russia or Brazil, while countries like the US, Canada, Russia, Japan and South Korea didn't see it as strong. Other words used to describe the EU were 'peaceful', 'efficient' and 'united'. While on the whole respondents across countries overwhelmingly chose positive adjectives, Russia is an outlier; in this case the words 'hypocritical' and 'arrogant' were frequent choices.

Figure 9. Most common descriptors of the EU



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.

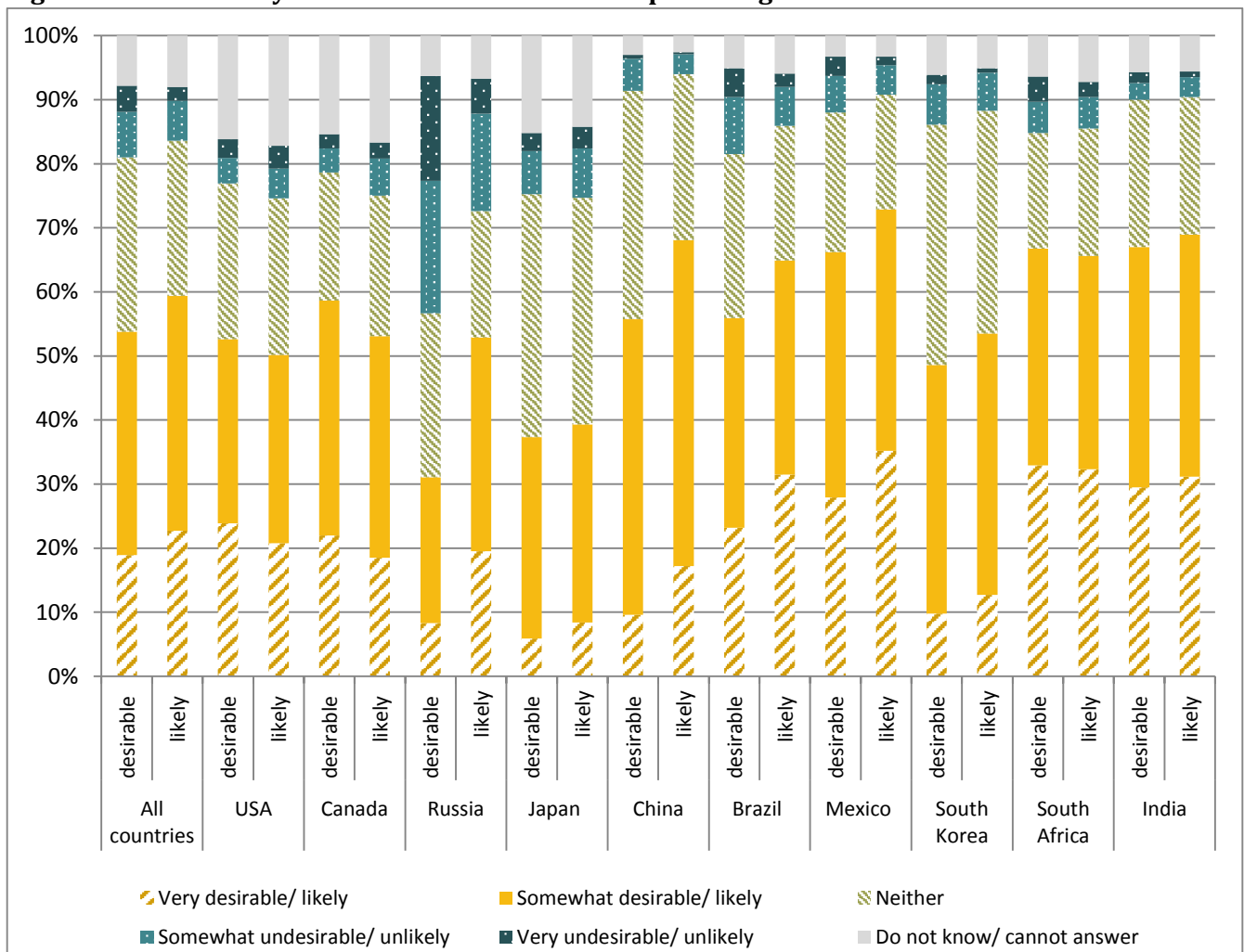
Media analysis, however reveals some of the current metaphors used to describe Europe and the EU. Given the media's focus on dramatic current events during the media monitoring period, negative metaphors were very frequent. EU's economy was often compared to a **sick person**, threatening to spread its economic ills globally (noted in the US, Canada, Russia, China, South Africa). Another popular metaphor was **unstable structure** in danger of collapse (Brazil, Mexico). The EU was also described as engaged in **economic battles** trying to fight its way out of the crisis (Canada, China, South Korea). In politics, there were metaphors of **disintegrating**

fabric (US, Korea, Russia), battle (Brazil, China, South Africa) and a **wounded person** (India). An image of the **'Fortress Europe'** also re-emerged (US). In the social frame, the most typical metaphor was a **flood**, with a tidal wave of refugees crashing on the shores of the EU.

2.3 Effectiveness

Effectiveness is linked to actorness, but goes one step further and asks more specifically whether the EU is perceived as being successful/ performing well in certain fields and on specific issues. As a proxy for EU's global effectiveness we asked how likely or unlikely the EU is to assume a **strong leadership role** in world affairs five years from now, as well as how desirable it would be for the EU to take this role (Figure 10).

Figure 10. Desirability vs likelihood of EU leadership role in global affairs



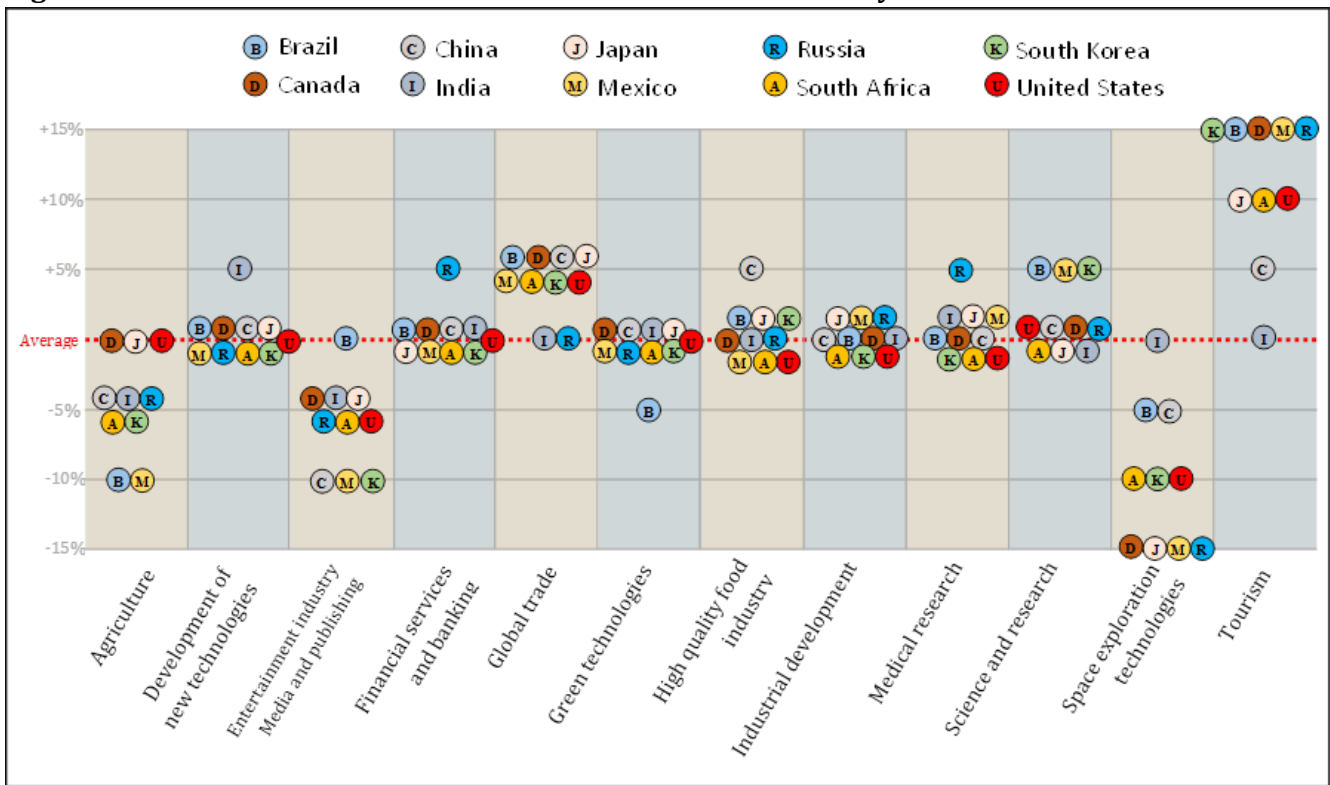
Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now?

Most respondents across SP countries argued that EU's leadership role in world affairs is both desirable and likely. Russia once again presents an outlier with 37.1 per cent of respondents choosing to say that EU's global leadership is somewhat to very undesirable and 20.7 per cent – rather or very unlikely. In Japan, South Korea, Canada and the US a very significant part of

respondents (around 35-50 per cent) opted for 'do not know' or 'neither nor' answers (Figure 10).

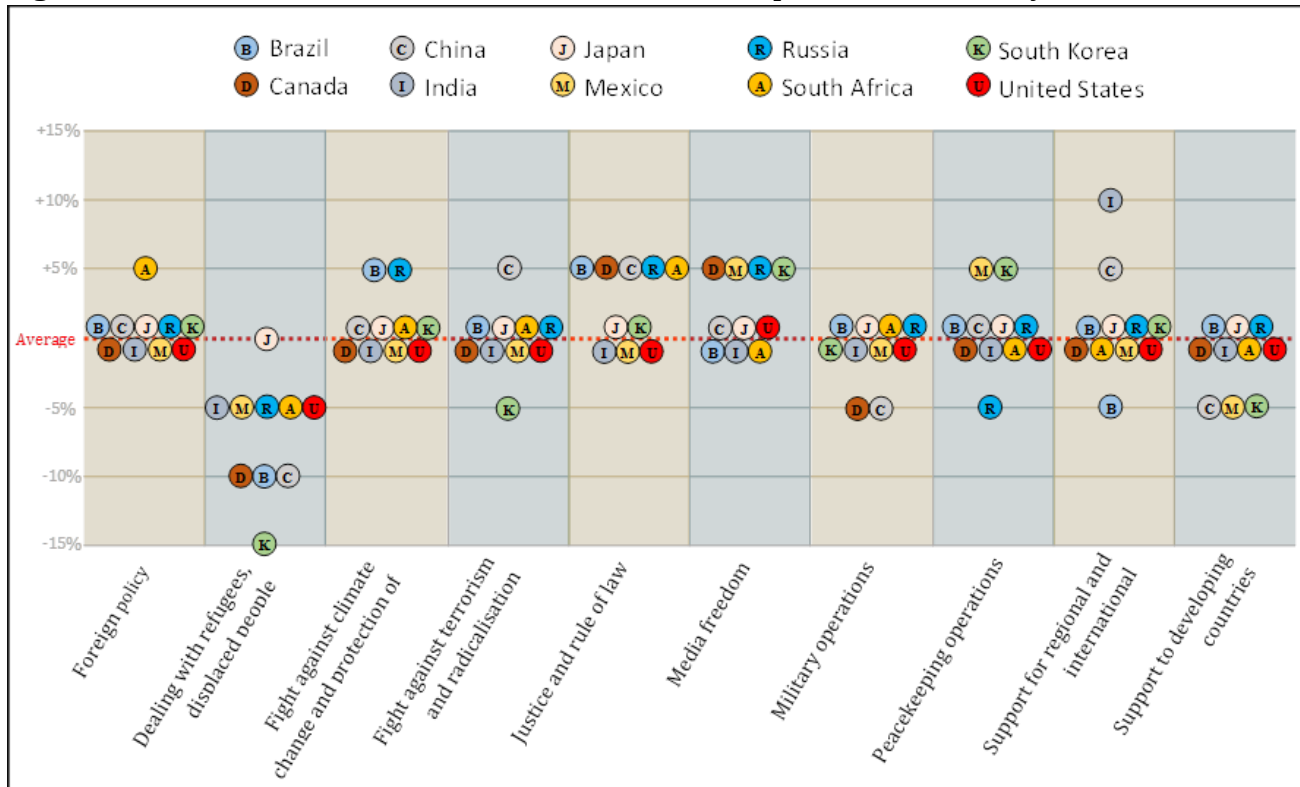
When it comes to **EU's performance** in the **field of economy**, most respondents agreed that the EU is an important trade partner for their countries and overall performs fairly well in global trade. Tourism was seen as an important economic activity for the EU, as well as the economic field in which the EU performs best compared to other areas. Respondents were relatively more sceptical with regards to EU's performance in space exploration technologies and agriculture (Figure 11). When it comes to **politics and security**, the EU was perceived as performing fairly well. The EU's performance in media freedom as well as justice and rule of law received relatively more positive assessments within countries, while its support to developing countries and dealing with refugees/ displaced people was viewed relatively less positively (Figure 12). In **social development**, the EU was seen as performing well in ensuring good overall quality of life, level of education as well as equality between men and women. However, EU's performance in relation to dealing with refugees (and displaced people) as well as protection of minorities, eradication of poverty and reducing income inequalities was seen less positively as compared to other areas of social development (Figure 13).

Figure 11. EU effectiveness in different thematic fields of economy and RS&T across SP countries



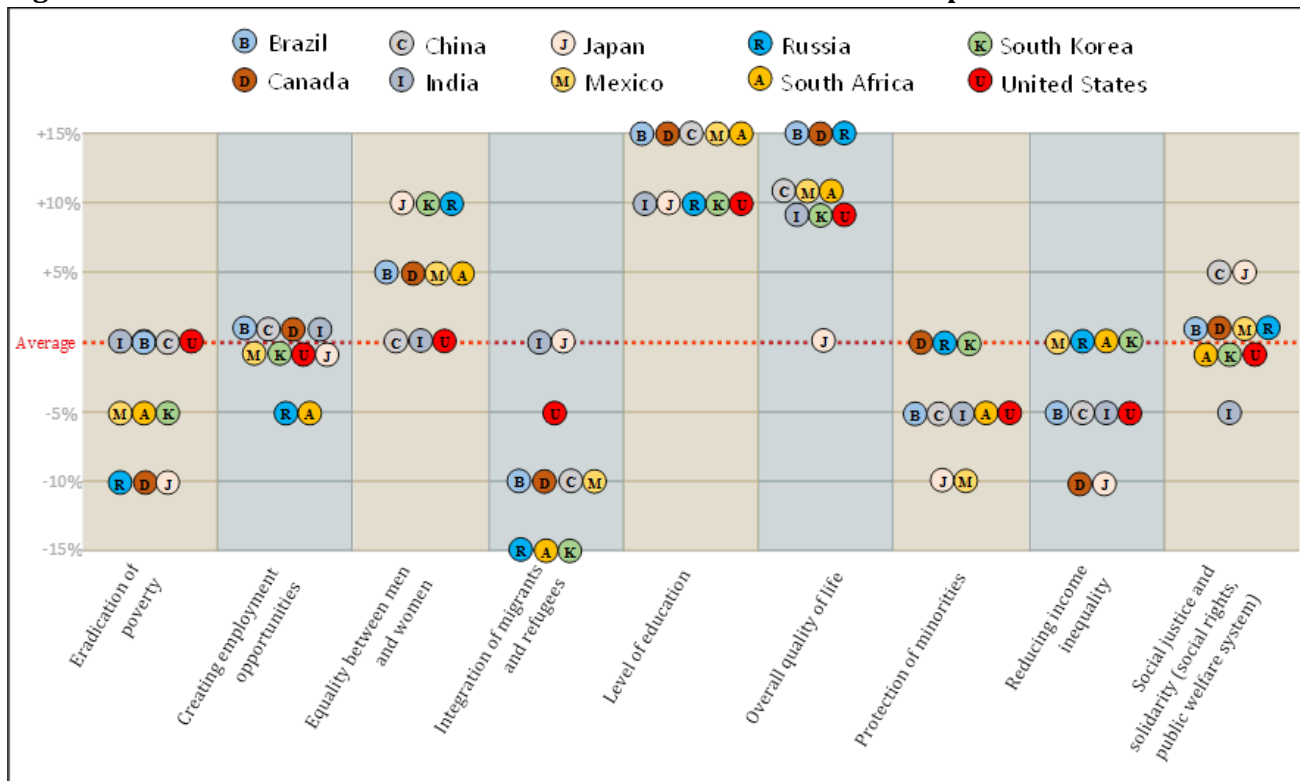
Note: Based on the survey Q13: How well do you think the EU performs in terms of the following areas of economy, trade, research and technology...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

Figure 12. EU effectiveness in different thematic fields of politics and security across SP countries



Note: Based on Q15: How well do you think the EU performs in terms of the following political areas...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

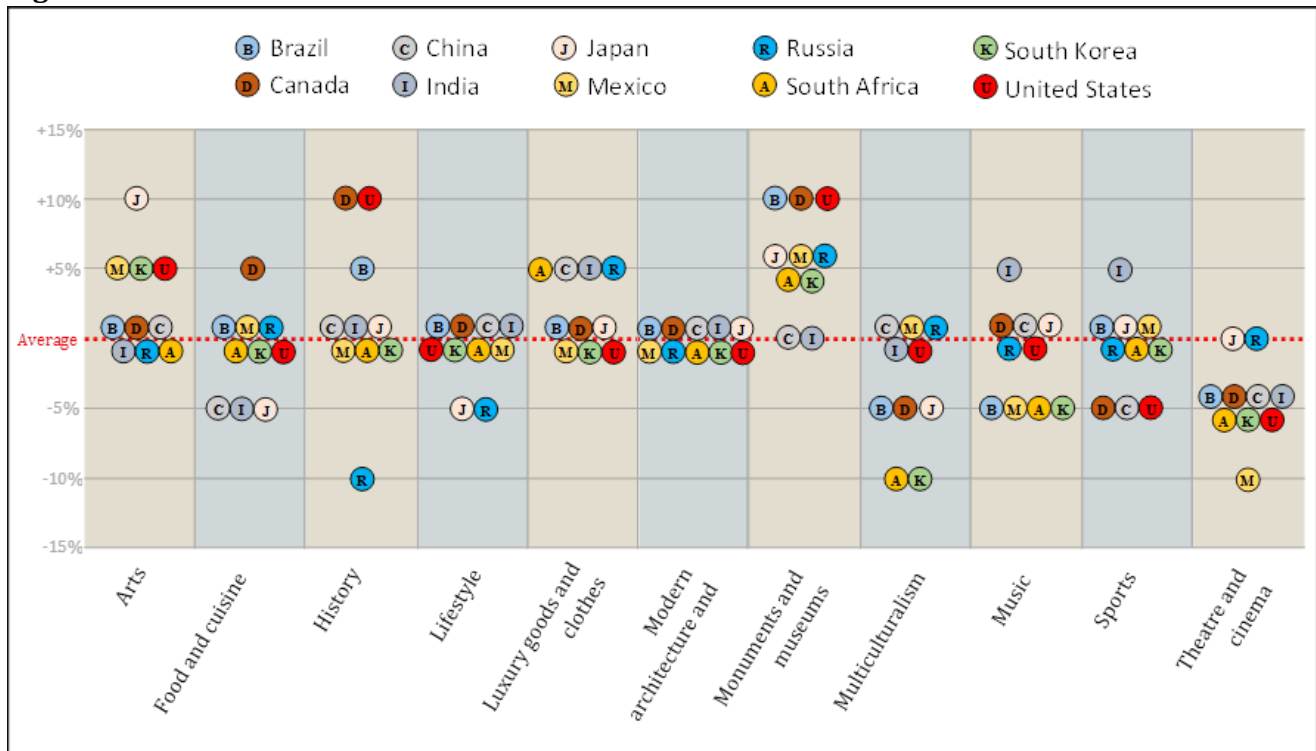
Figure 13. EU effectiveness in different thematic fields of social development across SP countries



Note: Based on Q17: How well do you think the EU performs in terms of the following areas of social development...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

In the broad realm of **culture** respondents rated all relevant areas positively and in particular the EU's/ European monuments and museums, history, arts, luxury goods and clothes which were rated above theatre and cinema, music, sports, food and cuisine (Figure 14). The analysis of various survey questions and other sources suggests higher appreciation among the SP countries of the historical facets of the EU (monuments, history, all types of art) rather than the modern. For example, the EU's performance in the entertainment industry was evaluated less positively in most of the countries (with the exception of Russia and Japan) as compared to other fields of economic activity (Figure 11 above).

Figure 14. EU effectiveness in different thematic fields of culture across SP countries



Note: Based on the survey Q19: How well do you think the EU and Europe as a whole performs in terms of the following fields of culture and sports...? The figure shows percentage point difference from the average of positive views **within countries** in relation to other domains in these fields, not in relation to other countries.

The public opinion survey shows more long-term and abstract perceptions. **Media analysis** reveals current assessments as to how the EU doing. While overall the assessments of the EU and Europe in the media tend to be mostly neutral, quite a large number is also negative, which is understandable given the media's focus on topical dramatic events and crises. Therefore, in all countries the three most visible frames (politics, economy, social affairs) tended to attract more negative than positive evaluations. In particular, the **economic crisis** confronting Greece was an on-going theme as well as the **political crises** of 2015 (potential Grexit and Brexit). But the most obvious change and a steep rise of negativity in EU media reporting was associated with the **migrant/ refugee crisis**. The media assessed some EU's policies as inhumane, restrictive and even militaristic. In fact, (based on earlier perceptions studies) EU's actions in the social sphere have never been assessed so negatively. This has already had an effect on public opinion as, according to the survey, answers on the EU's performance on refugees and migrant integration have been relatively more sceptical.

Importantly, media has also offered some positive views of the EU. In the **political** field, positive assessments were typically observed when the EU was reported as a key player in the Iran deal. EU's quantitative easing policy and its impact were reported positively when the EU was seen acting in the **economic** sphere. EU's implementation of competition law and establishment of regulatory practices in business, finance and industry were also addressed from a positive angle. A growth in the manufacturing sector of the Eurozone was reported alongside coverage about its recovery. In the **social** frame, EU's communal response to the Mediterranean refugee crisis was sometimes presented from a positive angle: while the solutions may have been criticized, the idea of the institution taking action and addressing it was viewed as positive – for example in Mexico. The EU was also reported as having initiated measures to ensure the protection and evacuation of migrants.

2.4 EU as a normative power

Despite the vivid academic discourse, the EU was rarely seen as a **norm-setter** across the building blocks of the public opinion survey and media analysis. The EU was perceived as an international norm-setter in few areas, such as renewable energy technology, equality between women and men or gay rights. The **social media** analysis however showed that in the context of the three events (Europe Day, G7 meeting and EU summit) images of the EU carried normative features: the EU was associated with the norms of human rights, good governance and sustainable development. The majority of tweets were neutral however the EU's actions around human rights (in particular, treatment of refugees) received a fair share of negative comments. Elite interviewees expressed doubts about the overall applicability of EU norms in their respective local contexts.

2.5 Explaining perceptions

We identified explanatory variables at various levels that help explain perceptions in different contexts. These are, in particular individual/ socio-economic characteristics, country-level characteristics such as cultural and historic ties to Europe, as well as global factors.

Figure 15. Key levels and factors for explaining perceptions



Note: Based on explanatory variables identified in the framework of this study

As concerns **age**, younger respondents hold somewhat more positive views on the EU in Canada, India, US, South Africa, while older people tend to be more positive about the EU in Brazil, China, Japan, Mexico, Russia and South Korea (see Table 2). Regarding **gender**, women tend to be less aware about and/ or have more negative views of the EU in most SP countries with the exceptions of Russia (somewhat more positive views) and China (gender has no influence on

views). **Contact with Europe** (living, visiting or having relatives in Europe) clearly supports more positive views on the EU; in the same vein, people who felt sufficiently informed about the EU tended to have more positive attitudes. When it comes to **income** and **working status**, more positive views were more likely to come from respondents in high income brackets as well as employed persons. Meanwhile, the **level of education** rarely had an effect, except for in Canada, where more educated people were more likely to have positive views, and Russia, where a more positive attitude was more often associated with students and people with a lower level of education.

Table 2. Influence of characteristics of individuals on positive/ negative perception of the EU

	General view of EU	SP country -EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Men ↑ (BR) Women ↓ (MX, ZA)	Women ↓ (CA, IN, JP, MX, ZA, KR, US)	Women ↑ (RU) Women ↓ (US)	Men ↑ (BR) Women ↓ (JP, MX, KR, US)	Women ↓ (IN, JP, US)	Women ↑ (RU)
Age	Older ↑ (BR, KR) Younger ↑ (CA, IN, ZA, US)	Older ↑ (BR, CN, JP, KR) Younger ↑ (ZA)	Older ↑ (JP, MX, RU, KR)	Older ↑ (BR, JP, KR)	Older ↑ (JP)	Older ↑ (BR, JP, MX, RU, KR) Younger ↑ (CN, ZA, US)
Contact with Europe	With contact ↑ (all except IN)	With contact ↑ (all except IN)	With contact ↑ (all except IN)	With contact ↑ (CA, CN, JP, RU, ZA, KR, US)	With contact ↑ (all except IN, MX)	With contact ↑ (all except IN)
Sufficiently informed	More informed ↑ (BR, CA, CN, IN, JP, US)	More informed ↑ (BR, CN, IN, MX, ZA, KR, US)	More informed ↑ (CN, US)	More informed ↑ (IN, US) Willing to learn more ↑ (RU)	More informed ↑ (IN, US) Willing to learn more ↑ (RU)	More informed ↑ (BR, CN, US) Willing to learn more ↑ (RU)
Income	Higher income ↑ (BR, CN, JP, MX, KR, US)	Higher income ↑ (BR, CN, JP, MX, RU, KR, US)	Higher income ↑ (all except CA, JP)	Higher income ↑ (BR, CN, IN, JP, MX, KR, US)	Higher income ↑ (BR, CN, IN, MX, KR, US)	Higher income ↑ (CN, MX, KR)
Level of education	More educated ↑ (CA)	More educated ↑ (CA) Students, less educated ↑ (RU)	More educated ↑ (CA)	More educated ↑ (CA)	More educated ↑ (CA, MX)	Students, less educated ↑ (RU)
Working status	Employed ↑ (BR, CA, CN, MX, KR, US)	Employed ↑ (BR, CA, CN, MX, KR, US)	Employed ↑ (KR, US)	Employed ↑ (MX, KR, US)	Employed ↑ (CN, KR, US)	...

Note: Based on country-specific cross tabulations generated from poll results for analysis of explanatory variables. ↑ respondents tend to have a more positive opinion; ↓ - respondents tend to have a more negative opinion.

On some specific questions, **regional differences** were noticed inside countries; specifically, slightly more positive views were somewhat more likely in Canada's British Columbia; India's Bangalore; Northeast and West of the US; Southern/ North Caucasian Federal District of Russia. In Japan, responses from the Hokkaido region tended to be more negative on some questions.

Among the country-specific factors, **history** plays out very differently in the SP countries: while there is evidence showing that common historical ties increase mutual understanding and encourage cooperation, the countries with a legacy of European colonialism may also see it as an obstacle. Based on interviews and other sources, historic connections to Europe were assessed rather positively in Canada and Mexico. Meanwhile, historical encounters were perceived very

ambiguously in India and Brazil, and overall rather negatively in South Africa. US media still pays special attention to events in the UK, and discusses the special historical relationship between the two countries. Media analysis furthermore showed that World War I and II (Japan, Canada, US, South Africa and India) are important elements shaping Europe's image in the world.

Related to history, **cultural ties** and/ or commonalities entailing common (or diverging) norms and values have an impact on perceptions. While the distinctiveness of cultural/ social norms can lead to clashes and conflicts, for instance on human rights (China) or data protection (USA), a common cultural heritage can also enhance the willingness to cooperate in various areas ranging from culture, to education and trade (Canada, Mexico). Brazil presents an unequivocal picture: while the media appreciates the common culture with Europe, particularly in the arts, literature and cinema, the country also aims to strengthen its distinctive culture instead of stressing its European heritage. In South Africa, cultural closeness to Europe is appreciated but exists in parallel to a feeling of cultural imperialism connected to the European lifestyle. Common values and mutual trust were also mentioned by interviewees in Japan and South Korea, in spite of their perceived distinct culture. Meanwhile, Russian interviewees shared their perception of the EU's 'propagandist culture' that weakens EU-Russia relations.

The **political system** of a country affects the way information is distributed. In the case of China and Russia, the political regime creates a powerful information monopoly through censorship affecting what information is accessible to people. Political systems in China and Russia also make it difficult to find common ground with the EU on issues such as democracy and human rights. In other countries what is perceived as the EU's political system is used to reflect on national specificities, such as different electoral systems (Brazil), protection of human rights, strengthening of administrative structures (Mexico). Finally, the decentralised political structure of Canada makes it easier to understand the operation of the EU.

Geopolitical matters, such as tense security relations with neighbouring countries may determine a country's preferred partner. Brazil, for instance, perceives itself as an emerging power that wants to be taken seriously in the international arena while favouring multilateral approaches. China accentuates the EU's role as counterweight to the US – also in the context of the rising tensions in Northeast Asia, particularly on the Korean peninsula. Japan offers another perspective, highlighting the US' comparatively more important role vis-à-vis China. Similarly, Canada is keen to explore the potential for cooperation with the EU considering shared concerns towards China as well as the EU's lack of hard power. Mexico strives for enhanced cooperation with the EU because it considers Latin America to be politically, socially and economically fragmented and in need of more effective institutions (with the EU presenting a role model). The US media portrays the EU as an important partner, and Europe as a crucial continent to keep unpredictable Russia under control. For Russia itself, the EU plays a crucial role in geopolitics: in the media, the EU is presented as a close 'other' able to impact Russia politically and economically.

Finally, **economic interdependence** is seen as desirable by some, for example to lessen US economic influence (e.g. Canada), or in the context FTA negotiations (e.g. South Korea), while others see EU's influence as risky and self-interested, and caution against too much economic dependency (e.g. South Africa). Russian media and interviewees notice the EU dependence on Russian oil and gas supplies, while at the same time admitting that Russia also depends on its exports to the EU.

2.6 Regional findings

The analysis of data across the building blocks of this study showed that countries stood out with their individual characteristics and regional trends or trends along other groupings such as BRICS have not been identifiable. Media in each country tells a story that is very much linked to the local context or reports on topics (e.g. the migration crisis) that are of interest globally and across all countries. Likewise in the public opinion poll, specific regional nuances could not be detected: across all countries, the general public leans towards similar directions, e.g. negative views spurred by the migration crises. The responses of outliers (such as Russia in many questions) can be traced back to their specific country-context and not their regional embedment. The interviews reflect this: interviewees predominantly referenced their country's context in the relations with the EU and Europe, and emphasised the differences much more than commonalities between their neighbours.

3 POLICY RECOMMENDATIONS

There is a need for a centralised EU Public Diplomacy strategy comprising a finite set of core messages, while the implementation needs to be adjusted to local specificities, context and capacities. The study corroborates suggestions coming from the Preparatory Action 'Culture in EU External Relations' which pointed towards the need for a cultural relations strategy with clear goals and priorities, while concurrently taking local conditions and concerns of the partner countries into account.

The decision remains with the policy makers whether to focus on the perceived strengths or on weaknesses of the EU as identified in this study as well as to pick out the target groups and audiences to work with. A core target group should be the youth with a special focus on potential future decision-makers. The recommendations below constitute a condensed list of recommendations presented in Chapter 6.2 of the Final Report.

3.1 Overall Public Diplomacy Strategy and its implementation

- ✓ Establish a centralised Public Diplomacy (PD) strategy with a decentralised implementation to adjust to local specificities; identify a finite set of core messages in cooperation with EU Delegations, encompassing common areas of interest, key topics, and key target groups that the EU Delegations can work with.
- ✓ Strive for a better coordination with the Member States: strengthen coordination with EU Member States by aiming for joint strategic approaches as well as regular and institutionalised coordination meetings within the respective SP countries.
- ✓ Engage in Cultural Diplomacy drawing on the very positive perceptions across the SP countries of European/ EU Member States' culture, arts and history. Support initiatives of cooperation, look out for new and innovative approaches, engage better with the youth culture and empower local cultural actors.

- ✓ Take advantage of the local knowledge accumulated by the EU Delegations: encourage the Delegations to determine their target groups' views and needs through regular analysis of their opinions and perceptions, identify national foci in close cooperation with the Delegations (who in their turn would work in close contact with local experts) for tailor-made communication.
- ✓ Formulate and target the PD messages while being aware of differing interpretations of history. Remove any Eurocentric notion of European superiority from dialogues with any actors in Strategic Partner countries, particularly in countries that have experienced European colonialism.
- ✓ Combine all funds related to PD/ visibility measures into a multi-annual, lump sum budget that the EU Delegation can assign to a comprehensive implementation strategy for its PD activities tailored to local conditions.
- ✓ Slim down bureaucratic and hierarchical hurdles to reduce use of human resources for administrative processes; streamline processes and decentralise competencies in order to focus resources on the PD activity itself, thereby contributing to a more effective PD.
- ✓ Initiate and engage with expert networks: establish platforms for interested experts to interconnect, exchange ideas and share information on selected policy fields that are relevant to EU PD; involve local experts into PD design, 'listening' exercises (e.g. perceptions and images surveys). Consult them on how to anchor centrally-formulated messages and strategies to local discourses.
- ✓ Engage local civil society and the youth for wider outreach and local resonance: engage in discussion, support networking, initiate or mediate exchanges of activists.
- ✓ Use e-diplomacy to make PD more effective and reach distant audiences: provide specialised training, recurring along technological progress cycles, to officials at EU Delegations in order to improve digital diplomacy and social media skills for a successful design and implementation of e-diplomacy actions.
- ✓ Ensure flexibility and decentralised decision-making in the case of unexpected events through sufficient local resource allocation and decentralised decision-making.
- ✓ Make evaluation an integral part of the outreach activities: create a web-based regularly updated data-pool of on-going PD initiatives, design centrally specific and consistent evaluation tools – such as this study's baseline indicators – in order to provide the Delegations with synchronized measurement tools for the success of their outreach activities.

3.2 Media and social media recommendations

Below we present only the gist of the media and social media recommendations. For the elaborate version consult Chapters 6.2.4 and 6.2.5 of the Final Report.

- ✓ Devise location-specific media outreach programmes
- ✓ Organise the exchange of experience on engaging with media among EU Delegations

- ✓ Use high profile visits combined with a high profile outreach programme towards media to communicate how the EU is dealing with crises
- ✓ Focus on 3-5 most influential news sources with deep respect to the 'local'
- ✓ Identify and approach the local news authors who specialise on the EU and Europe news
- ✓ Engage in exchange diplomacy
- ✓ Increase the EU's visibility with messages with a local hook
- ✓ Draw on the concept of Europe to promote EU's messages
- ✓ Work with the major international news agencies, consider the viability of establishing a multilingual 'EU-news agency'
- ✓ Conduct regular media monitoring and analysis
- ✓ Ensure active, relevant and extensive presence on Twitter
- ✓ Provide easy access to information
- ✓ Engage in an active dialogue with citizens (EU and non-EU)
- ✓ Ensure systematic monitoring and analysis of social media data

3.3 Summary overview of country-level recommendations

The overarching (as presented above) as well as country-level recommendations should be considered together as the former may inform the latter. Some of the ideas and actions suggested below have been identified in previous studies, but are still very much relevant; they draw on evidence we identified in our research and can be seen as a re-affirmation of previous work. In order to develop customised communication strategies and their implementation, the country-based outputs (media and public opinion, informed by interviews and CE's expertise) of this study serve as a pool of rich and in-depth information. They are uploaded on the e-directory for further use. The recommendations offer a set of possibilities and suggestions to feed into the EU's Public Diplomacy where suitable. It is complemented by Chapter 4 of the Final Report, which presents suggestions concerning target groups, audiences and (potential) partner organisations. Below we only present the essential clusters of recommendations. For country-specific contexts and actions please see Chapter 6.2.6 of the Final Report.

- ✓ Engage in a stratified dialogue with different audiences, in local languages: engage with the youth and other target audiences, undertake a pro-active approach towards newsmakers and use diverse channels, including e-diplomacy and radio.
- ✓ Centre Public Diplomacy messages on resonating topics and normative visions: capitalise on the positive perception to produce messages that are tailored to the local context, enhance visibility of research, science, technology, energy, education, innovation, international development, long-term projects.
- ✓ Engage in open discussion concerning norms and values, offer first hand views from Europe, and reach out to different groups in the society to improve awareness and

understanding of the EU, engage in mutual learning with other societies on migration and multiculturalism.

- ✓ Listen to, consult with various groups: address perception of the EU having a hearing problem, consult with a variety local actors/ regarding EU-funded projects, make the EU more relevant at the local level.
- ✓ Encourage the development of personal links with Europe and the EU: engage in education, research, professional and cultural exchanges, engage with European diasporas, support networking among those returning from Europe.
- ✓ Strive for better coordination of PD efforts with the Member States, look for synergies, co-operate with European foundations and NGOs.

4 BRAZIL



Executive Summary

In Brazil awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below most of the countries, above only India and Russia, however the EU is better known than most international organisations, with the exception of the UN and Mercosur. EU visibility in terms of how frequently people hear about it is rather high –only 11% never hear about it or cannot provide an opinion, while over 65% hear about it at least once a week or more often. The main sources for getting information on the EU are TV channels, online media (including online versions of print media) and social media. The three most visible themes in EU news in print media used for analysis are economy, politics and social and culture, while in Europe news cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organizations in Brazil. Respondents find the EU among the top 3 most influential, important or attractive international actors in most thematic areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among the respondents in Brazil were ‘strong’, ‘efficient’ and ‘multicultural.’ Overall, most EU articles in Brazil newspapers were neutral; however, almost twice as many of the remaining articles were negatively rather than positively framed. In contrast, in more than half of the articles, Europe was evaluated positively. Overall, media did not cover any EU policies or programmes in Brazil and in general seem to refrain from presenting a ‘local hook’. Contrastingly, EU’s interaction with the geopolitical region drew media attention.

The Brazilian public finds EU leadership in global affairs slightly less desirable than that of Japan or Brazil but above the rest of the countries used for comparison. Moreover, Brazilians also consider the US more likely to assume global leadership than the EU, which they rank as the second most likely actor to take on such a role. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded for its monuments and museums, and least positively for the theatre and cinema, as well as multiculturalism and music. In different areas of social development and education, the EU is seen best for education and quality of life and relatively least so for protection of minorities and integration of migrants and refugees. In economy and RS&T, the EU is best regarded for tourism and least so for agriculture. As regards politics and security, respondents in Brazil were most positive about EU’s performance in protection of environment and the rule of law, and least positive about its efforts in dealing with refugees.

[→ Full Country Chapter: Final Report Chapter 3.1: p.61]
[→ List of potential partners: Final Report Table 22: p.259]

BRAZIL



Context

Strategic Partnership initiated in 2007 (current Joint Action Plan: 2014-2017). Related key documents: EC-Brazil Framework Co-operation Agreement (1992).

EU-Mercosur FTA negotiations re-launched in 2010 (concerning Brazil directly as a member of Mercosur).

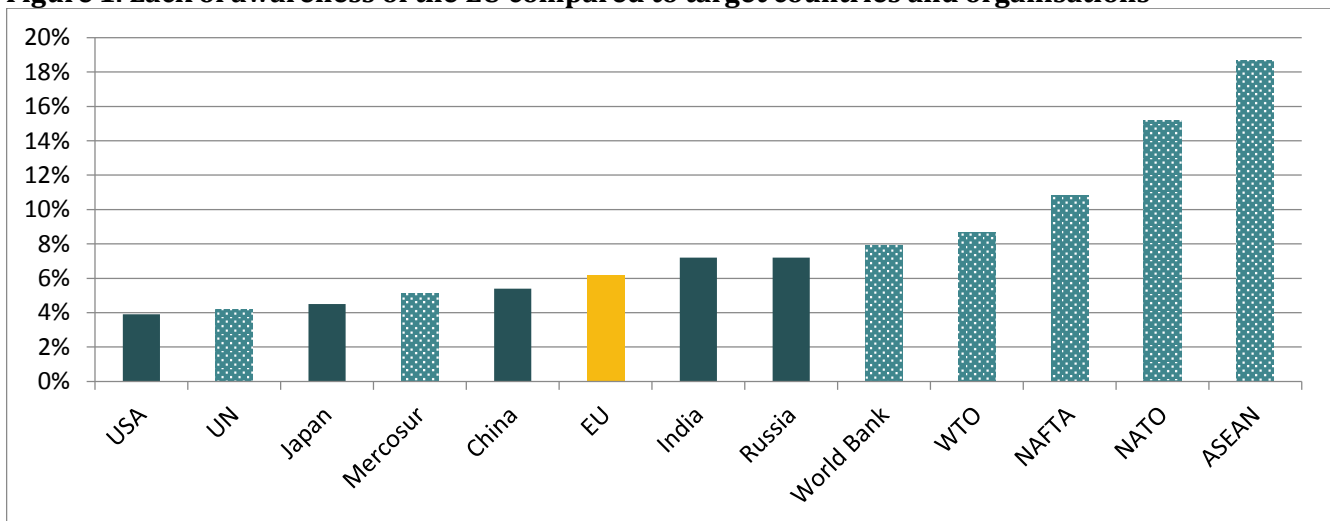
Trade with Brazil accounts for 34.4 per cent of total EU total trade with the Latin American region (2013 data). EU is Brazil's first trading partner, accounting for 21.4 per cent of its total trade and Brazil is the EU's ninth trading partner, accounting for 2.1 per cent of total EU trade.

Visibility

Awareness of the EU in Brazil – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in Brazil awareness of the EU is below that of most of the countries used for comparison, with the exception of India and Russia. Brazil general public, however, finds the EU more visible than most other international organisations, behind only the UN and Mercosur.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1210).



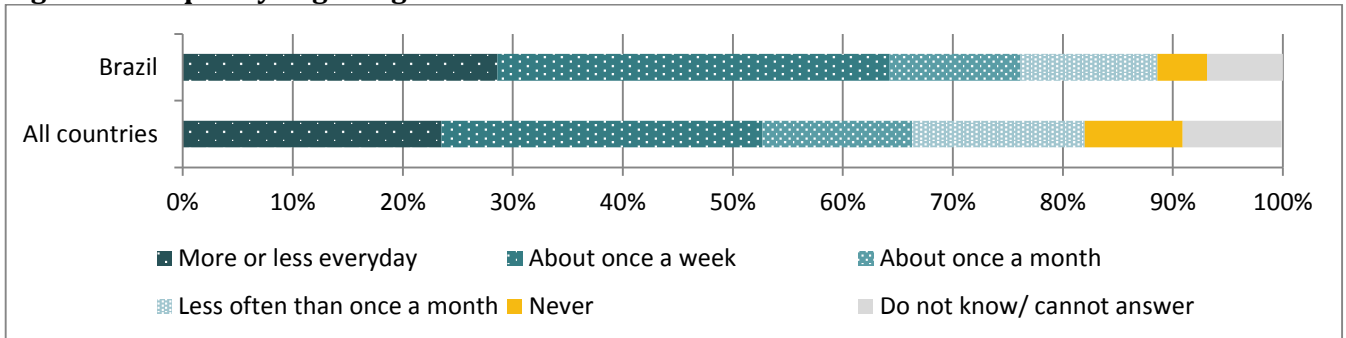
Compared to other countries, awareness of the EU in Brazil (6% unaware/ 94% aware) is relatively high, lagging behind South Korea, Mexico, Russia (all three 4% unaware/ 96% aware) and China (3% unaware/ 97% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in Brazil is relatively high. Most Brazil respondents stated that such information would reach them about once a week (36%) or more or less everyday (29%). Meanwhile, the smallest group of Brazilian respondents (5%) stated that they never hear or read about the EU.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1210).



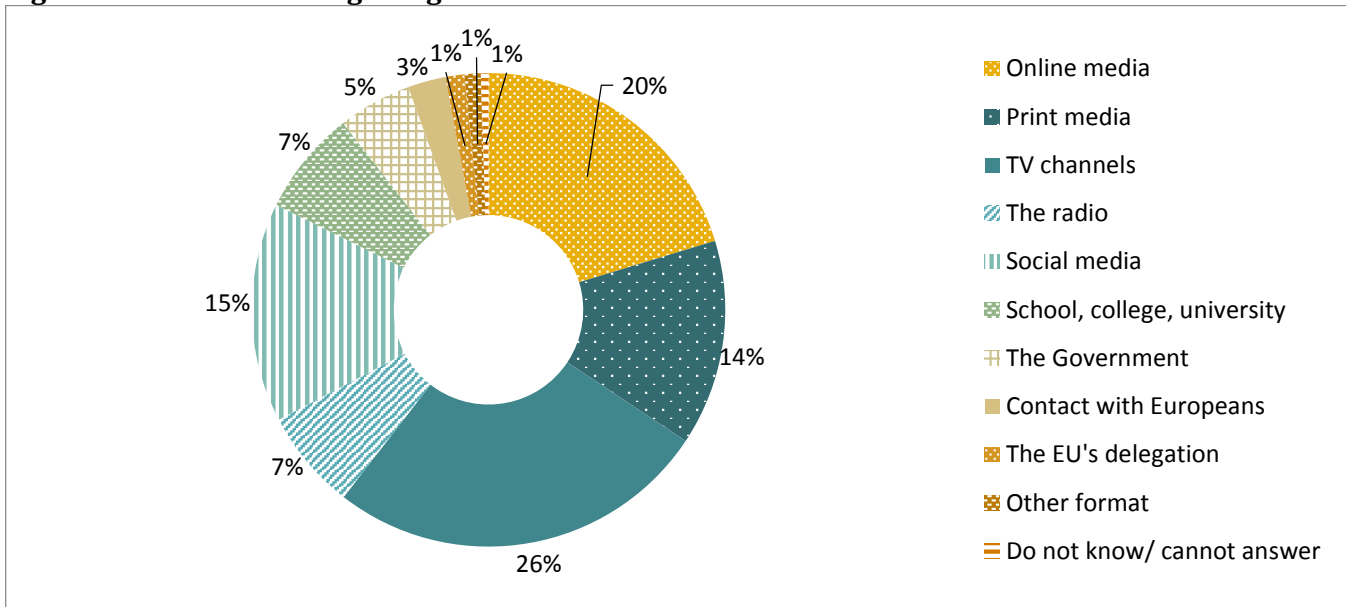
The frequency of hearing or reading about the EU in Brazil, as compared to results in other Strategic Partner countries, is relatively high. The share of Brazilian respondents who stated that information about the EU would reach them more or less everyday is one of the highest compared to results in other SP countries (lower only than the ones of Russia and China).

[\[→ comparative overview \]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in Brazil are TV channels (26%), online media (20%) and social media (15%). Meanwhile, print media (14%) is lagging just behind the mentioned top-three media sources.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 1070).



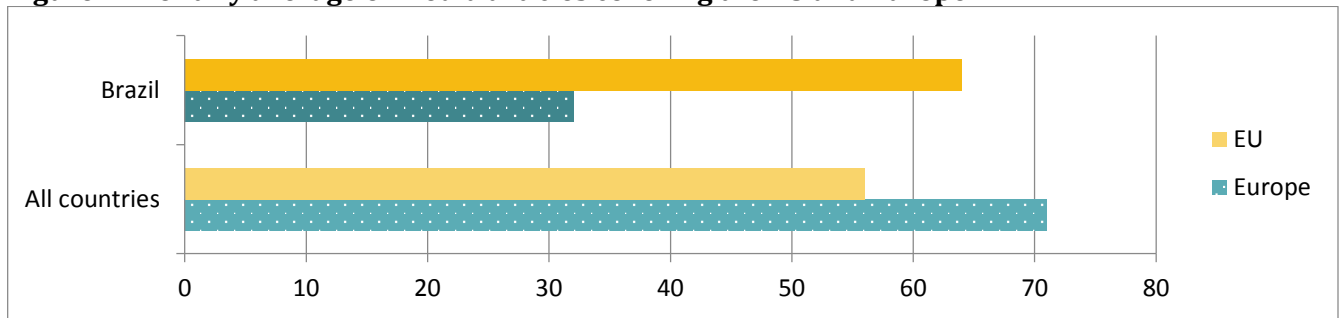
Compared to the other 9 SP countries, Brazil respondents marked the same sequence of most popular media sources (TV channels, online media and social media) as those in Russia and South Africa.

[→ [comparative overview](#)]

Volume of media articles

According to media analysis, the selected Brazil popular and business print media outlets mention the EU (monthly average – 64 articles) more frequently than Europe (32).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in O Globo, Folha de São Paulo and Valor Econômico (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



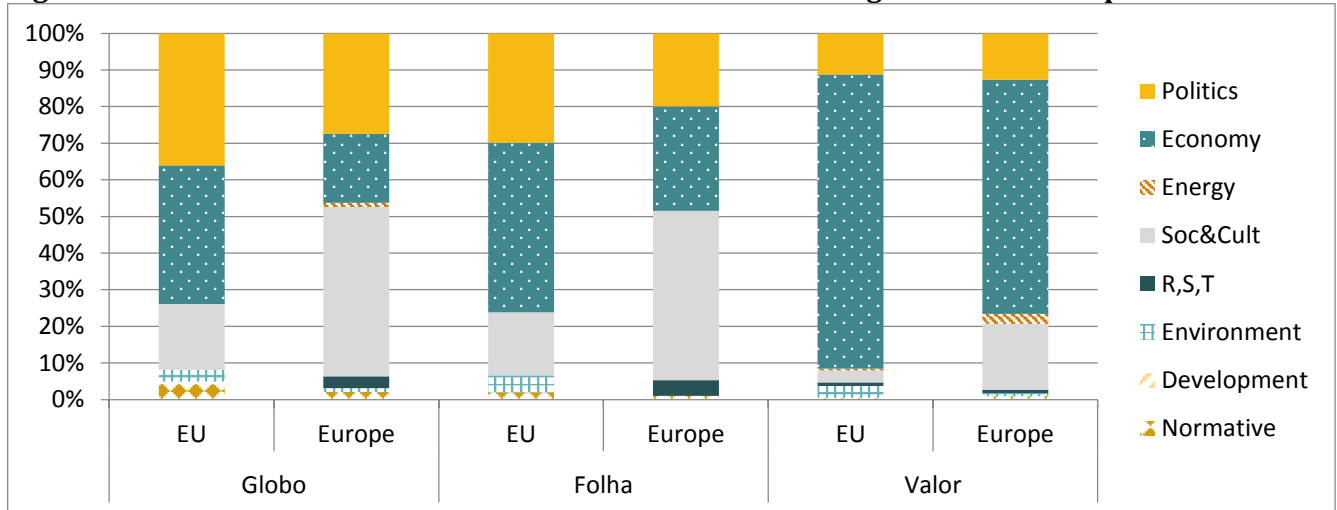
Compared to results in other target countries, Brazil is among countries with the least articles covering Europe. Since the EU in Brazilian media outlets was mentioned twice as much, this is contrary to the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56). [→ [comparative overview](#)]

Most and least visible themes

The majority of Brazil media coverage of the EU concerns economy (109 articles/month) and politics (50), and, to a lesser extent, social and cultural issues (24), with other topics getting little media coverage (13). In economic news related to the EU, the state of the economy was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on EU Russia sanctions and relations with Russia. Finally, social and cultural news, the third most popular frame in EU-related news in Brazil, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were development, energy and RS&T.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Also other themes (RS&T, energy) are covered more often than in articles mentioning the EU. This partly coincides with the results of the survey: in Brazil, respondents associated areas as economy and politics are first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in O Globo, Folha de São Paulo and Valor Econômico during the period April-June, 2015.



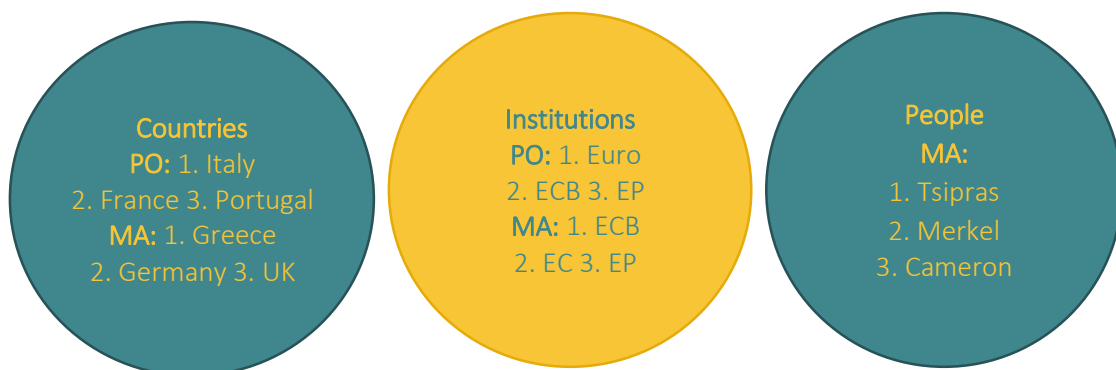
Media analysis results in Brazil show very similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for Brazil respondents the most attractive EU Member States are Italy, France and Portugal. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and the UK (related to Brexit).
- Meanwhile the results concerning institutions demonstrate similar tendency for both survey and media analysis EU dataset, showing ECB (as an institution) in the first place, probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in O Globo, Folha de São Paulo and Valor Econômico during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1210).



In this case tendencies in Brazil are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit, Brexit and the state of the economy in the EU during the media monitoring period.

[\[→ comparative overview \]](#)

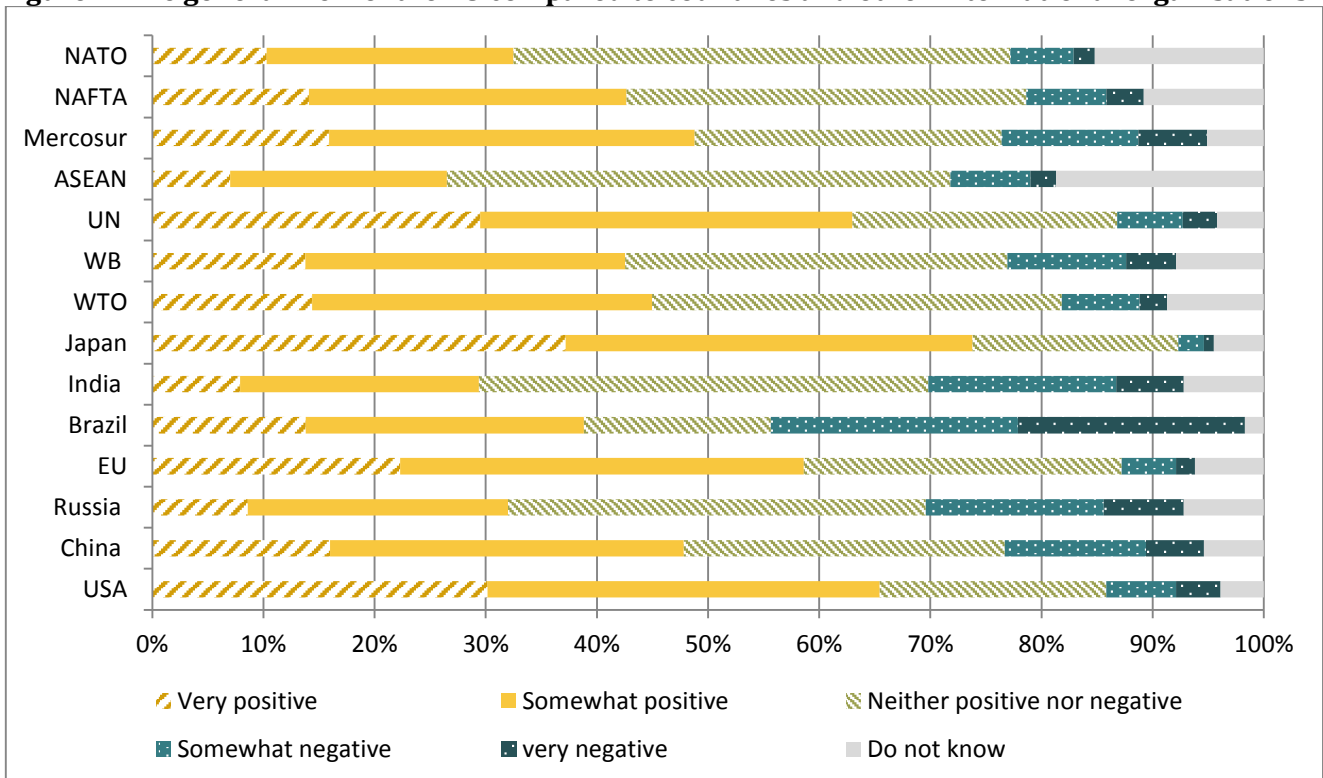
Actorness

Overall evaluation of the EU among the general public

From the point of view of Brazil’s general population, the EU was among the most positively viewed global actors when comparing to a preselected list of countries and multilateral organizations. In the case of the former, the EU ranked below only Japan and the US and, in the case of the latter, it outranked all organizations except the UN. A total of 59% of Brazil respondents viewed the EU positively, compared to 7% that viewed it negatively.

Overall, media did not cover any EU policies or programmes in Brazil and in general seem to refrain from presenting a ‘local hook’. Contrastingly, EU’s interaction with the geopolitical region drew media attention.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1210).



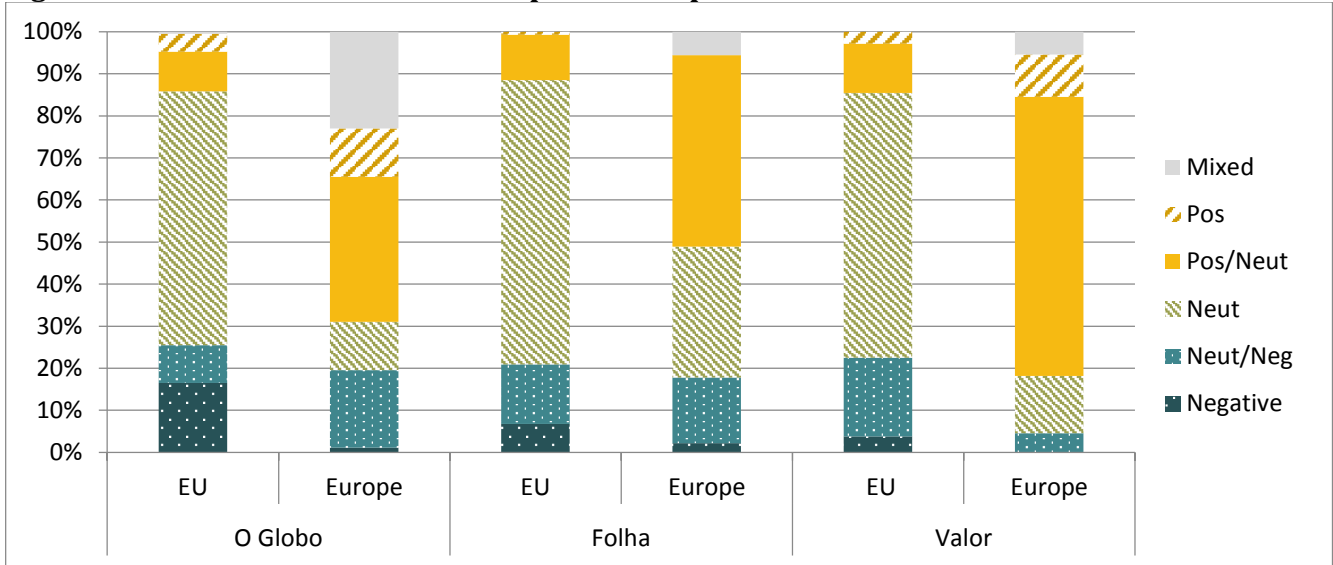
Looking at how the EU is evaluated in Brazil as compared to in the other Strategic Partner countries, Brazil respondents evaluated the EU less positively only than did respondents in India and Mexico, while in all other countries the general population was less positive about the EU. Negative evaluations were similar, albeit slightly below the ten-country average.

[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Brazil newspapers evaluated it mostly neutrally. Evaluations were somewhat more negative than positive – some 13% of articles had the EU framed positively as opposed to 23% where it was framed negatively (Figure 8). Europe coverage, however, was more positive in evaluations – it was evaluated positively in 57% of the articles and negatively in 13% of news items mentioning Europe.

Figure 8. Evaluation of the EU and Europe in Brazil printed media

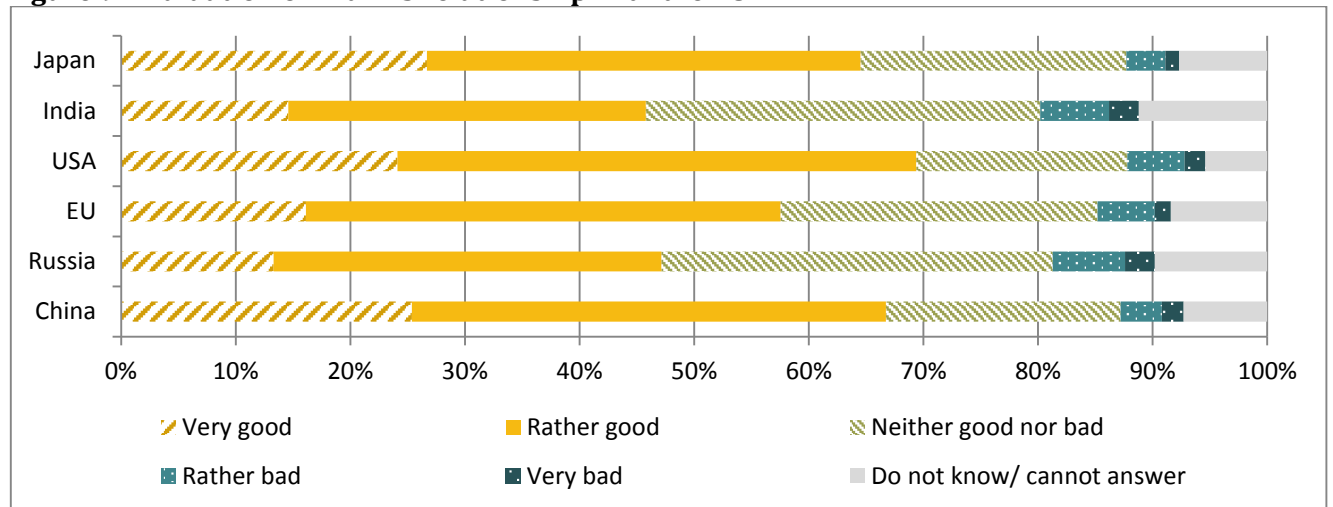


Note: Based on observation of news articles mentioning the EU and Europe in O Globo, Folha de São Paulo and Valor Econômico (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU's relationship with Brazil

According to the public opinion poll, Brazil's general population views their country's relationship with the EU to be mostly good, albeit less so than its relationship with the US, China and Japan. Some 58% of respondents view it as good, compared to 6% that view it negatively (see Figure 9). Respondents evaluated Brazil's relationship with the EU similarly to their general view of the bloc (see Figure 7).

Figure 9. Evaluation of Brazil's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1210).



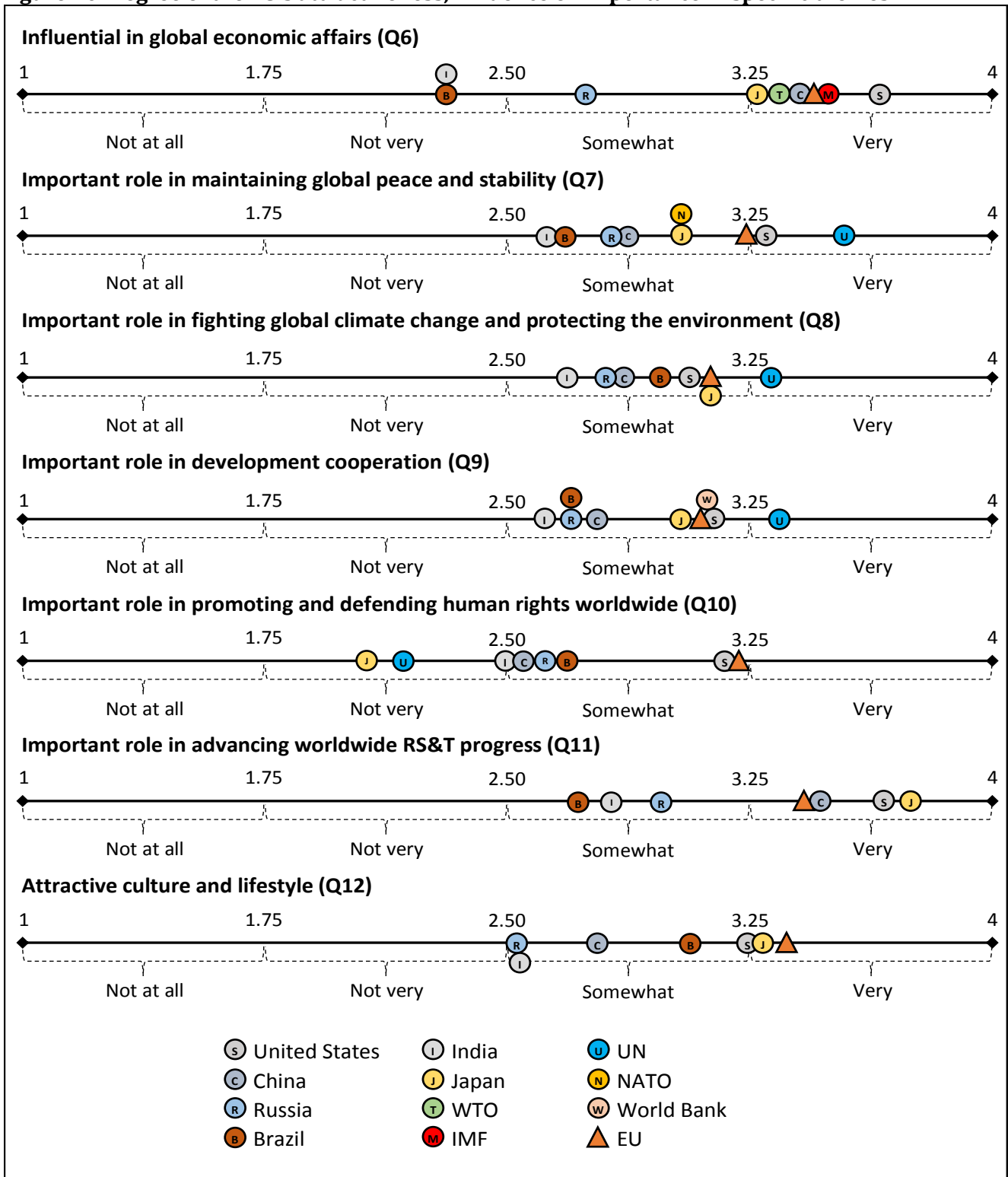
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, Brazil doesn't stand out, and the extent of positive and negative evaluations is close to the 10-country average.

[\[→ comparative overview\]](#)

Importance of the EU in selected thematic fields

Overall, the general public in Brazil sees the EU as a somewhat to very influential, important and attractive international actor across the areas listed in Figure 10. Looking comparatively at which areas the EU was seen as more important, global economic affairs, advancing worldwide RS&T, and upholding an attractive lifestyle stand over others. Furthermore, the EU is among the top 3 most influential, important and attractive international actors in most of the thematic areas listed in Figure 10 except RS&T. As for RS&T, Brazilian general public found the role of Japan, the US, and China more important in advancing innovation and technological progress worldwide than that of the EU. Moreover, the general public in Brazil sees the role of the EU and the US as notably more important in promoting and defending human rights worldwide compared to other countries and organisations.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1210). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



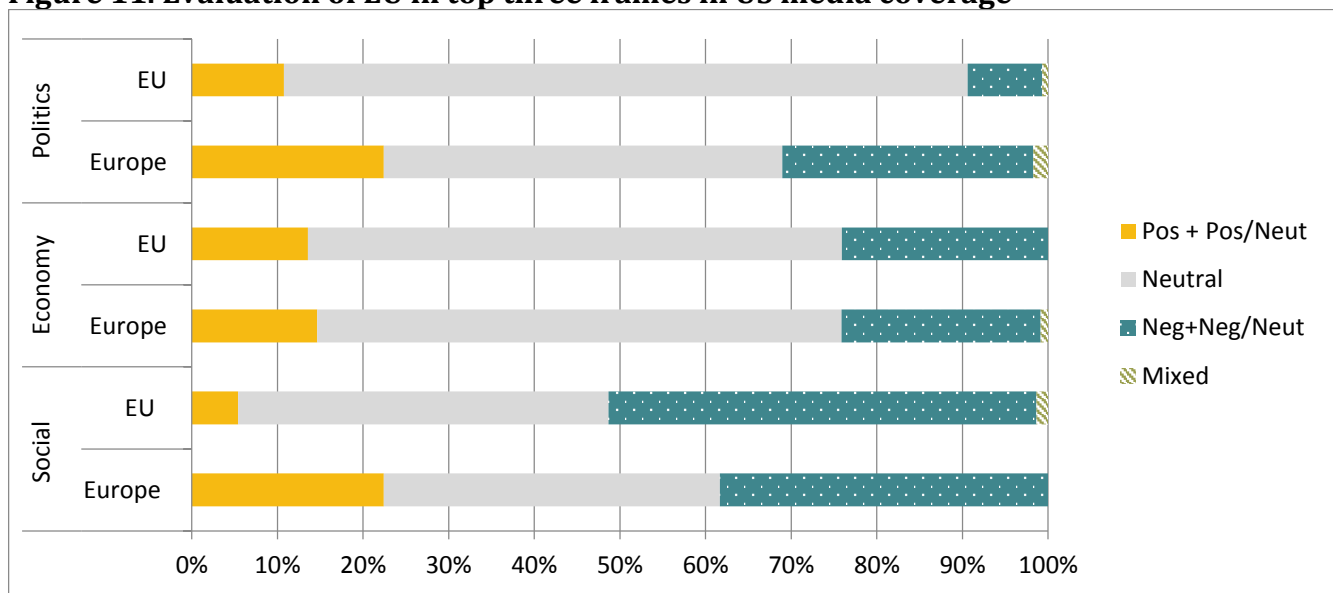
Looking comparatively how important SP country populations find the EU to be across different thematic areas listed in Figure 10, in Brazil it is seen as relatively more attractive in terms of its culture and lifestyle, in this respect only Mexico respondents were more positive, and also more influential in global economic affairs and advancing worldwide RS&T progress.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in Brazil’s media coverage: social and culture, economy and politics, Europe was more often evaluated positively across the three frames, but particularly in articles dealing with social issues and politics. Interestingly, Europe more often than EU was also evaluated negatively in the political frame. The EU was framed more negatively in the social frame, while in economic coverage both the EU and Europe were evaluated similarly, both in terms of the proportion of positive, neutral and negative evaluations. Looking at just the EU dataset, among the three themes, the EU was framed most positively in the economic frame, and most negatively in the social one.

Figure 11. Evaluation of EU in top three frames in US media coverage



Note: Based on observation of news articles mentioning the EU and Europe in O Globo, Folha de São Paulo and Valor Econômico (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

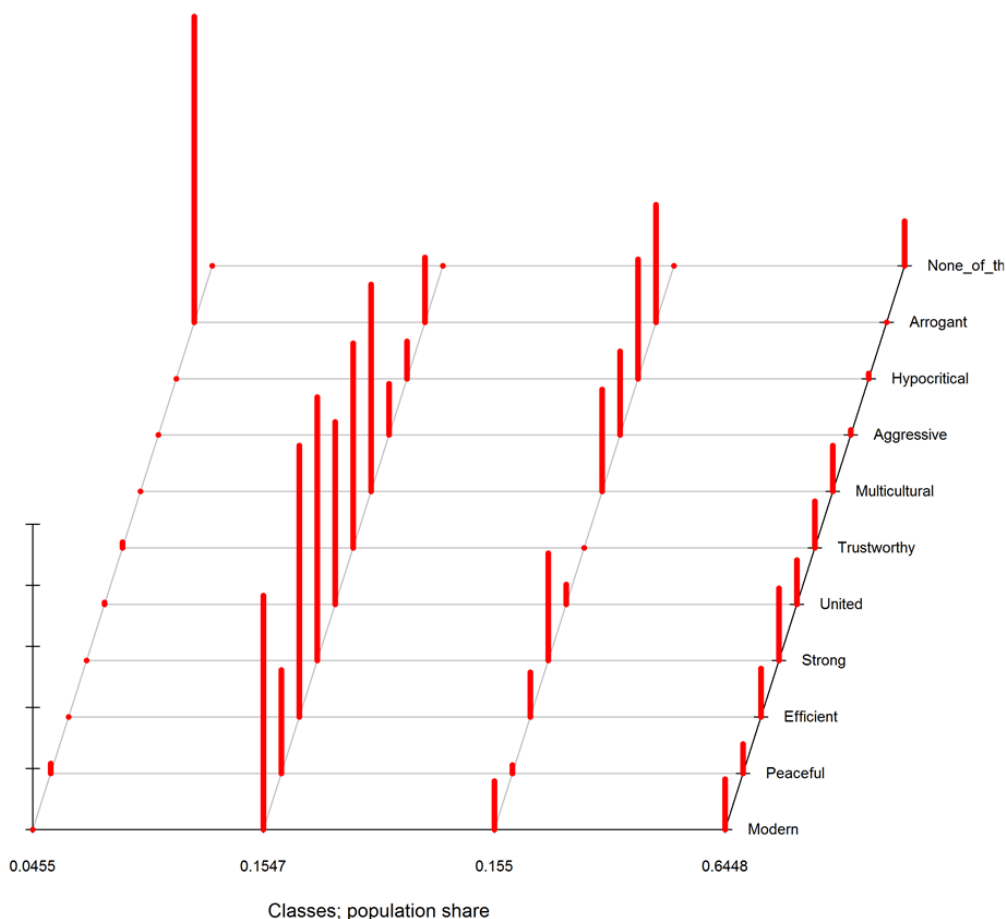
Most common descriptors used by the general population in association to EU

The general population in Brazil chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes:

- Mostly positive but few descriptors, and no opinion on EU – 64% (top 3: strong, efficient, multicultural).
- Mostly positive and many descriptors – 15%.
- Mixed, but mostly negative – 16% (top 3: arrogant, hypocritical, multicultural).
- One negative descriptor – arrogant – 5%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it’s viewed positively. The LCA in Figure 12 shows to what extent this descriptor was used as a negative versus a positive one – see the height of the multicultural bar in the 64% class (most to the right) compared to the height of this bar in the 16% class (second to right from the left). As the 64% class used almost exclusively positive descriptors, their use of multicultural is positive. Meanwhile, the 16% and 15% classes used mixed descriptors, so no conclusion about the connotations of their use of multicultural can be made.

Figure 12. Latent class analysis of EU’s descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1210) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all other 9 SP countries except in Russia, the general population in Brazil chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, Brazil stands out in having a different class composition – while in most countries the four classes were two mostly positive, one without an opinion and one mostly negative, in Brazil two classes used negative descriptors, one just choosing the descriptor arrogant alone to describe the EU. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview\]](#)

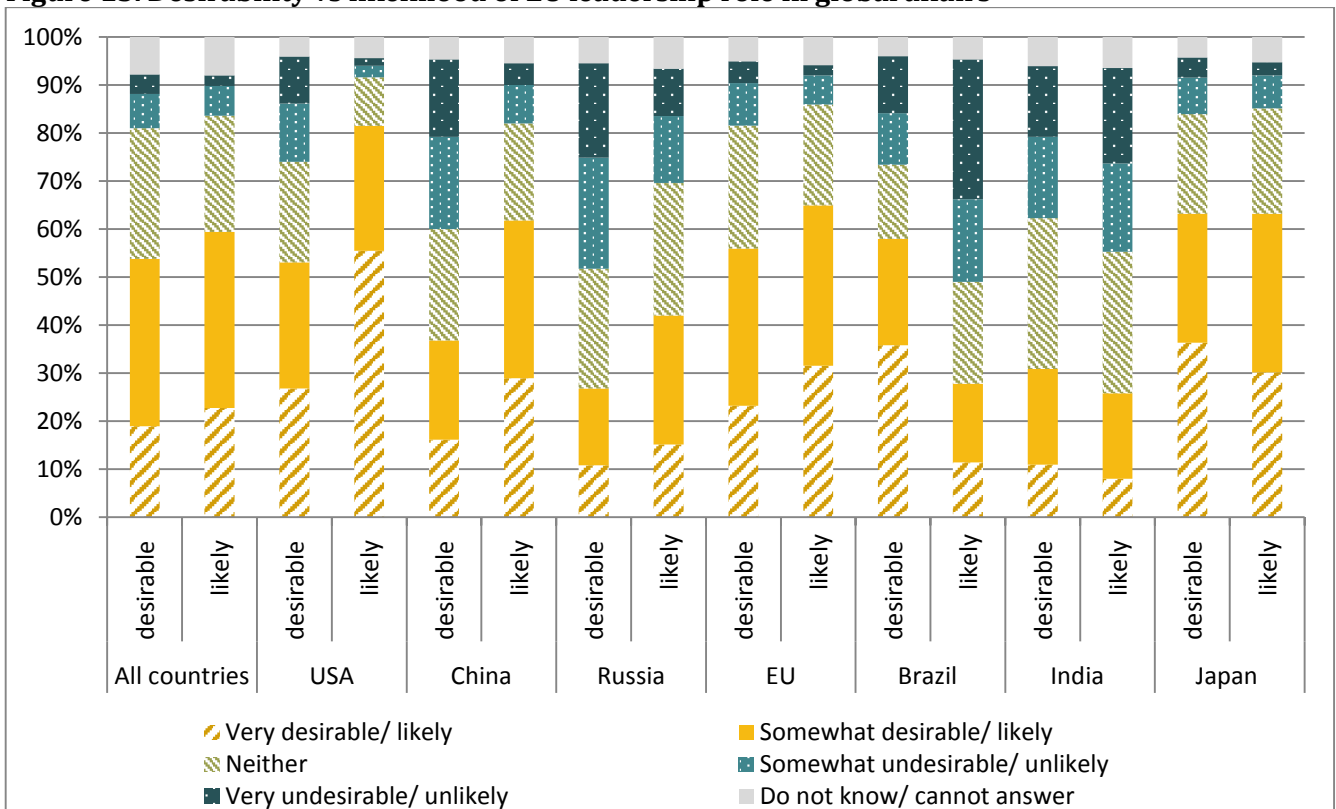
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that Brazil respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public in Brazil finds EU global leadership more likely than desirable. Looking at desirability of its leadership, the EU falls significantly behind the US, and, to a lesser extent, behind Japan and Brazil itself. However, compared to other countries, fewer respondents consider EU's global leadership very undesirable and unlikely.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4: How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5: And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1210).



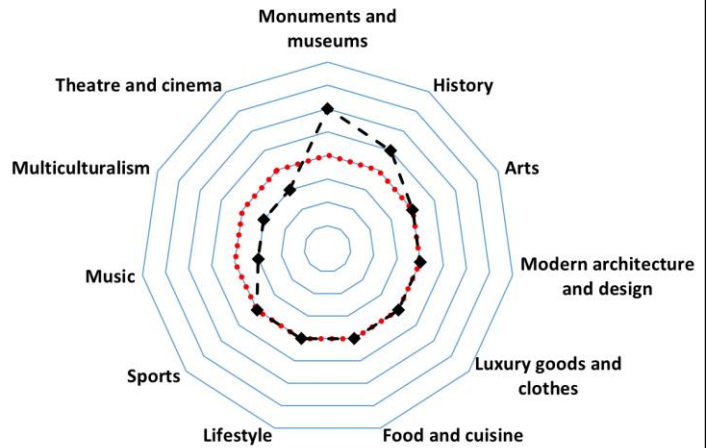
Looking comparatively at how desirable versus likely EU future global leadership is perceived to be for SP country publics, Brazil respondents see the EU as a somewhat desirable and likely global leader, and in this respect Brazil doesn't stand out among the SP countries on both counts.

[\[→ comparative overview \]](#)

Culture

In the area of culture, the general public in Brazil had the most positive views towards EU's effectiveness in terms of its monuments and museums. On the contrary, the theatre and cinema, as well as multiculturalism and music were least often viewed positively. Across the remaining fields, the Brazilian public expressed relatively more positive views in terms of EU effectiveness in history.

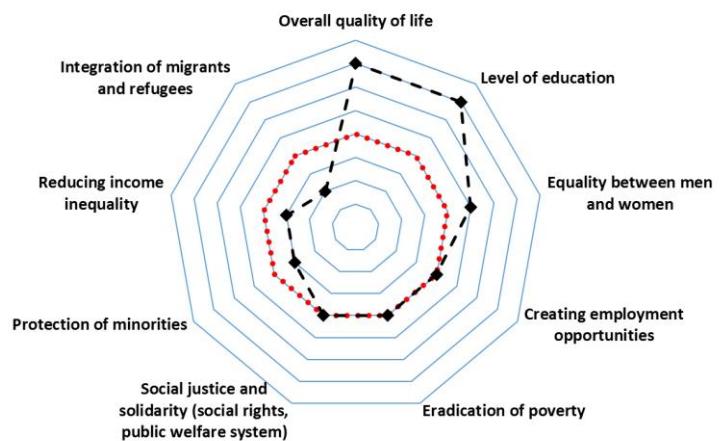
Figure 14. Culture



Social development and education

In the area of social development and education, Brazilian respondents had the most positive views regarding EU's performance in terms of education and quality of life. On the other hand, they expressed least positive views in terms of integration of migrants and refugees. Across the remaining fields, the Brazilian public were relatively more positive with regards to EU's performance in ensuring equality between men and women. Brazilians were relatively less positive on EU's performance in reduction of income inequalities and protection of migrants.

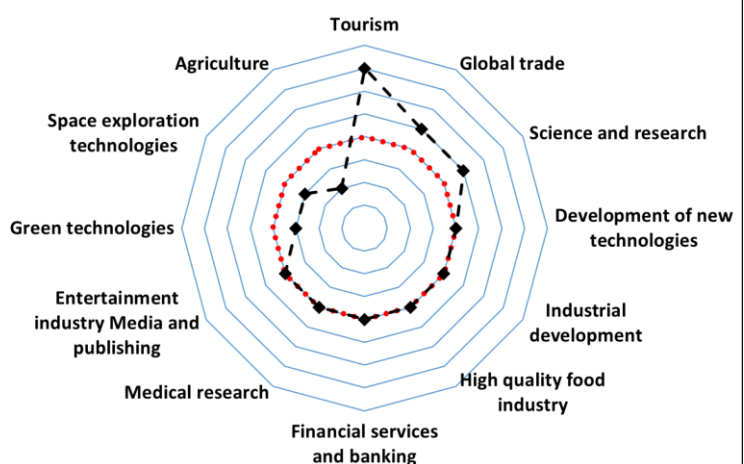
Figure 15. Social development, education



Economy and RS&T

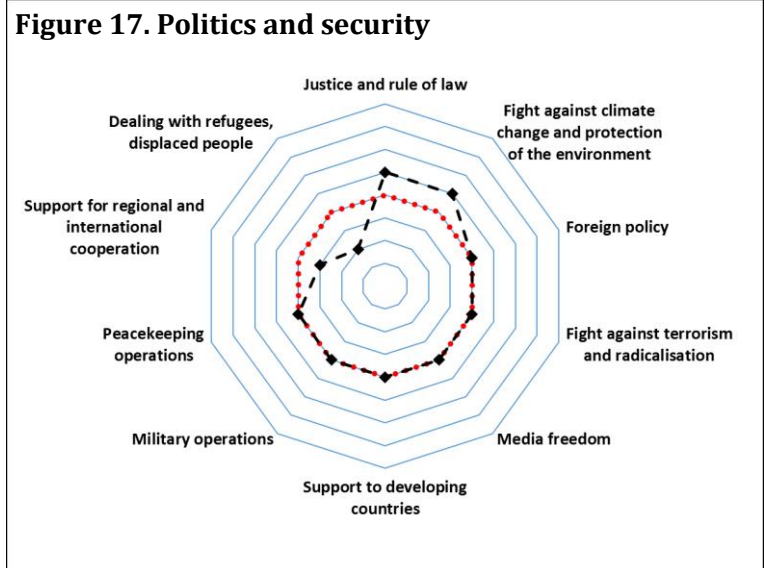
In the area of economy and RS&T, respondents in Brazil were most positive about EU's performance in the field of tourism and least positive in agriculture. Across the remaining fields, Brazilians were relatively more positive on EU's performance in global trade, as well as science and research, but less positive about EU's performance in the field of green technologies and space exploration technologies.

Figure 16. Economy, trade, research and technology



Politics and security

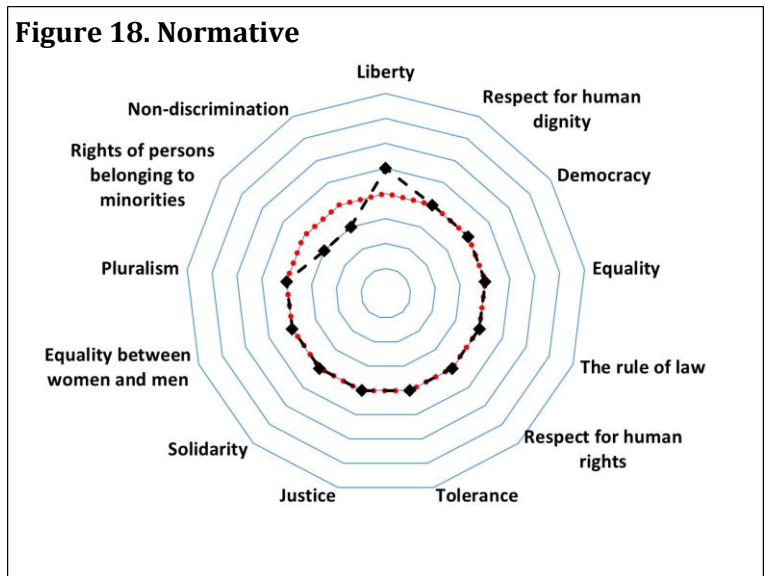
In the area of politics and security, respondents in Brazil were most positive about the EU's performance in terms of protection of environment and the rule of law. On the contrary, they expressed least positive views in terms of EU's dealing with refugees. Furthermore, across the remaining fields, Brazilians were relatively less positive about EU's performance in supporting regional and international cooperation.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19: How well do you think the EU performs in terms of the following areas... (N = 1210). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

In regards to the normative criteria, Brazilian respondents reported that their views are most similar to those of the EU on issues related to liberty. They also found EU's views on non-discrimination and minority rights least similar to their own views.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1210). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, older respondents in Brazil hold somewhat more positive views on the EU in general, and within specific thematic fields (EU's influence in economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). In terms of **gender**, men have more a more positive general view on the EU, and find EU leadership more desirable.

Higher **income** was also linked to more positive views generally and specifically across themes. Also, higher earners were more positive about the Brazil-EU relationship, found EU to be more attractive, and a more desirable and likely global leader. **Working status** also featured among explanatory criteria – respondents who were employed at the time of the study had a more positive general view of the EU, as well as the EU-Brazil relationship. Lastly, the **region of residence** and **education** did not account for differences in perceptions.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that feel they have **sufficient information on the EU**, and have had **contact with Europe**, reported having more positive general and theme-specific views of the EU as well as the Brazil-EU relationship. Those that have some contact with Europe also found the EU more attractive, and a more likely global leader.

Table 1. Demographic and familiarity with Europe predictors of perceptions

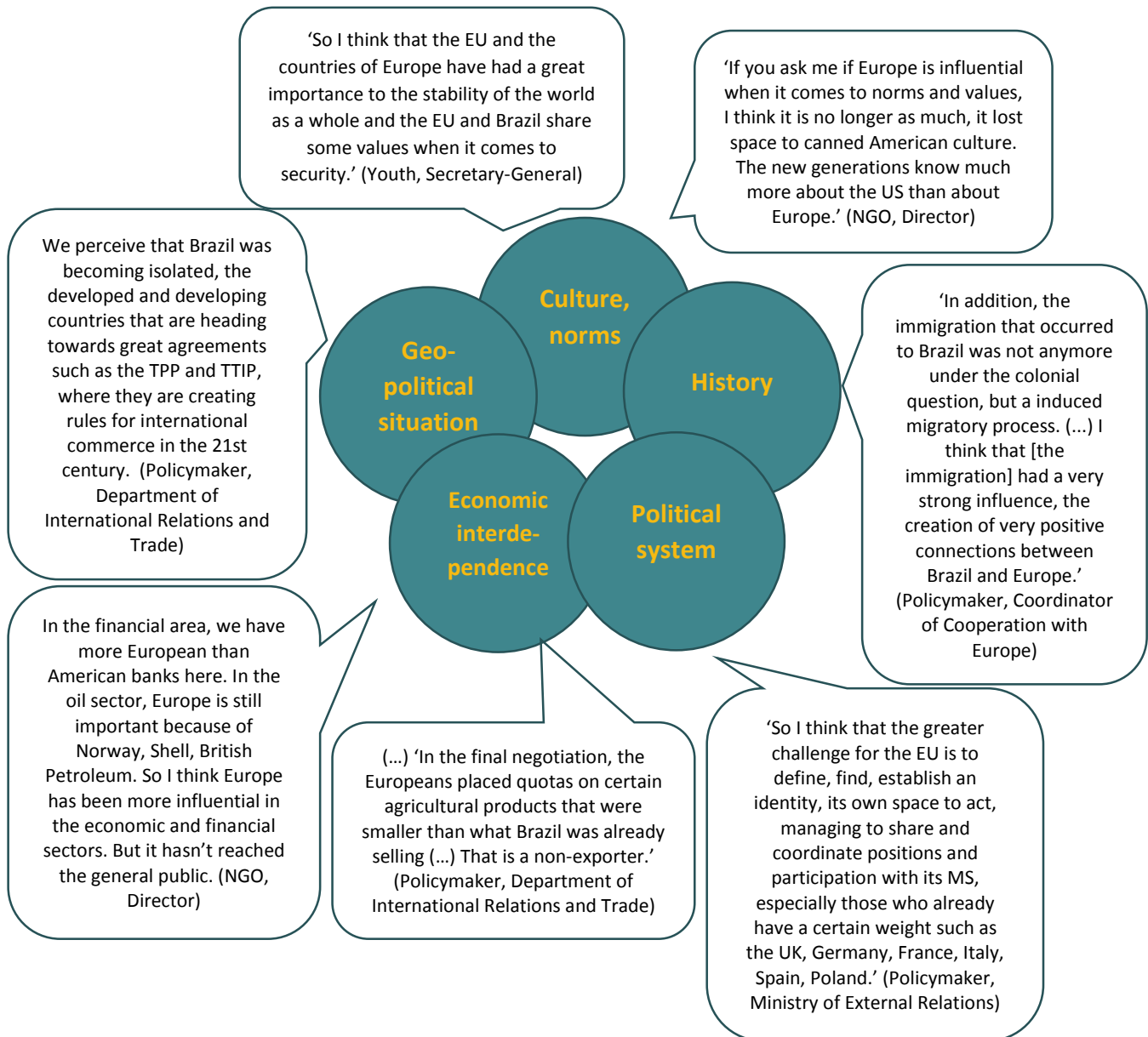
	Awareness of EU	General view of EU	Brazil-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	...	Men ↑	...	...	Men ↑	...	...
Age	...	Older ↑	Older ↑	...	Older ↑	...	Older ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	...	With contact ↑	With contact ↑
Sufficiently informed	...	More informed ↑	More informed ↑	...	...	...	More informed ↑
Income	...	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	...
Level of education
Working status	...	Employed ↑	Employed ↑	...	...	...	...
Region

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1210). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the ten SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Brazilian views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



5 CANADA



Executive Summary

In Canada awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather low – as many as 68% either could not provide an opinion, never hear about it at all or do so once a month or less. The top 3 sources for getting information on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes of EU news in print media used for analysis are economy, politics and social and culture, whereas in Europe news social and cultural issues were mentioned more often than politics.

The EU was among the most positively viewed countries and international organizations in Canada. Respondents find the EU among the top 3 most influential, important or attractive international actors in most thematic areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among the respondents in Canada were ‘multilateral,’ ‘strong’ and ‘united.’ Overall, most of the articles in Canadian newspapers framed the EU neutrally, however, twice as many of the remaining articles contained a negative rather than a positive assessment. In contrast, more than half of the articles framed Europe positively. Overall, media tend to portray cyclical (e.g. UK election) or outstanding events (Greek debt crisis, Grexit and Brexit). Internal EU matters are seemingly not of much interest. Furthermore, media reporting mirrors regional and cultural differences: in the Quebec newspaper, European and francophone influence prevails, while in the English-speaking papers, interest in Anglo-Saxon activities is bigger.

The Canadian public ranks EU leadership in global affairs as more desirable than that of any other country used for comparison. However, Canadians find the US and China as more likely to assume global leadership in the future than the EU, making it the third most likely actor to take on such a role. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded for its monuments and museums, as well as history, and least positively for the theatre and cinema, as well as multiculturalism and sports. In different areas of social development and education, the EU is seen best for education and quality of life and relatively least so for integration of migrants, reduction of income inequalities, and eradication of poverty. In economy and RS&T, the EU is best regarded for tourism and least so for space exploration technologies. As regards politics and security, respondents in Canada were most positive about EU’s performance in the area of media freedom, the rule of law and peacekeeping operations, and least positive about its efforts in dealing with refugees.

[→ Full Country Chapter: Final Report Chapter 3.2 p.80]
[→ List of potential partners: Final Report Table 23: p.261]



Context

Canada became EU's Strategic Partner in 2014. Earlier key documents: Framework Agreement for Commercial and Economic Cooperation between Canada and the European Communities (1976) and EU-Canada Political Declaration and Joint Action Plan (1996).

The most important potential FTA agreement – Comprehensive Economic and Trade Agreement between Canada and the EU (officially presented in 2014).

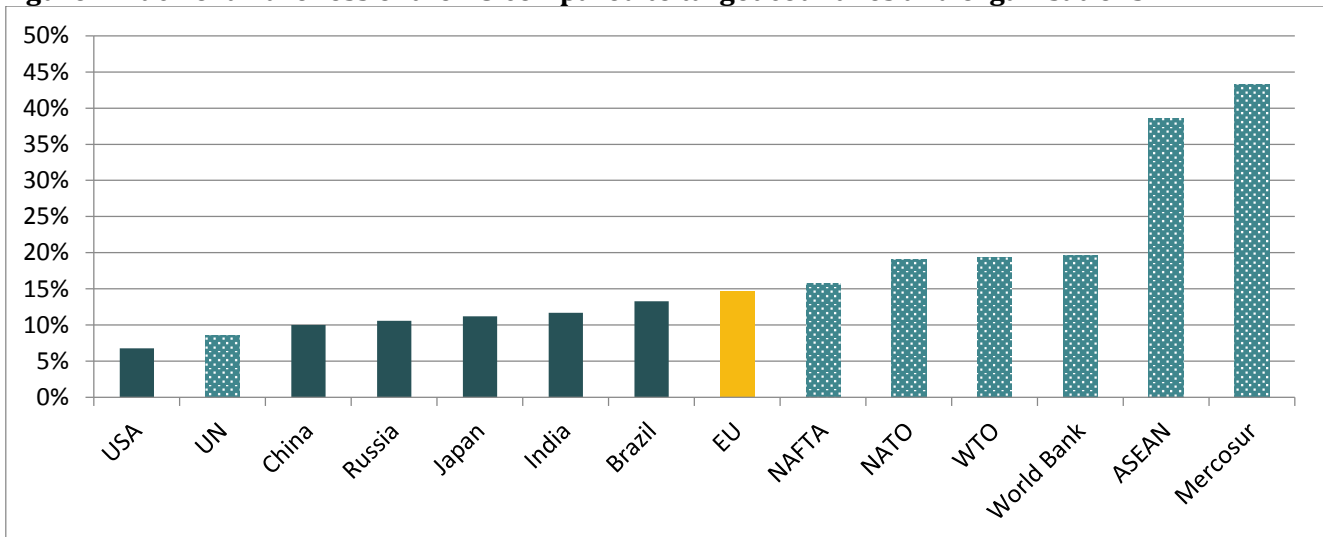
Canada is EU's 12th most important trading partner accounting for 1.7 per cent of the EU's total external trade (2014). EU was Canada's second most important trading partner (after the US) with around 9.2 per cent of Canada's total external trade in goods (2013). Bilateral trade value in goods: €59.1 billion (2014).

Visibility

Awareness of the EU in Canada – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in Canada awareness of the EU is below that of the countries used for comparison. The Canadian general public, however, finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1022).



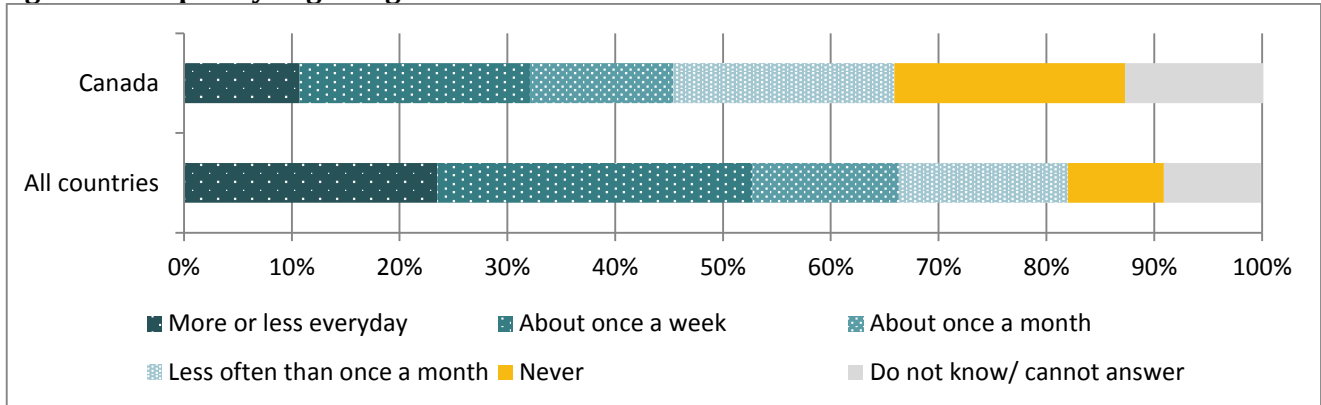
Compared to other countries, awareness of the EU in Canada (15% unaware/ 85% aware) is the lowest together with the ones of the US and Japan (both 14% unaware/ 86% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in the Canada is relatively low. Most Canadian respondents stated that such information would never reach them, would reach them about once a week or that they would hear or read about the EU less often than once a month (each of the three groups constitutes 21%). Meanwhile, the smallest group of Canada respondents (11%) stated that they hear or read about the EU more or less every day.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1022).



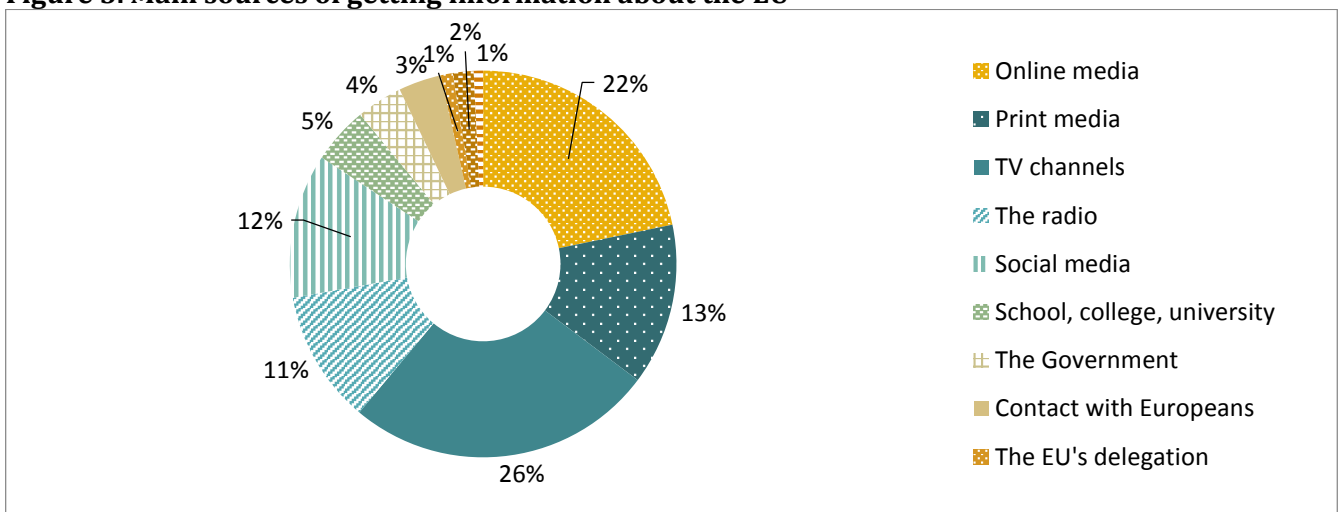
The frequency of hearing or reading about the EU in Canada, as compared to results in other Strategic Partner countries, is relatively low. The share of Canadian respondents who stated that information about the EU would never reach them is one of the highest compared to results in other SP countries (slightly behind only the US).

[\[→ comparative overview \]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in Canada are TV channels (26%), online media (22%) and print media (13%). Meanwhile social media (12%) is lagging just behind the mentioned top-three media sources.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 671).



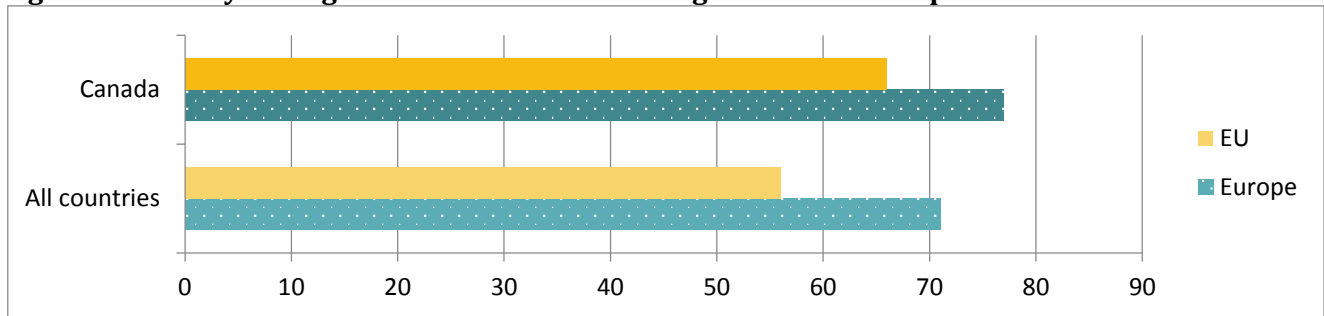
Compared to the other 9 SP countries, Canada respondents marked the same sequence of most popular media sources (TV channels, online media and print media) as those in the US, Japan and South Korea.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected Canada popular and business print media outlets mention the Europe (monthly average – 77 articles) more frequently than the EU (66).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The Globe and Mail, National Post and La Presse (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, Canada is among countries with the most articles covering the EU. However, at the same time Europe is mentioned more often in Canadian media, in line with the general tendency across the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

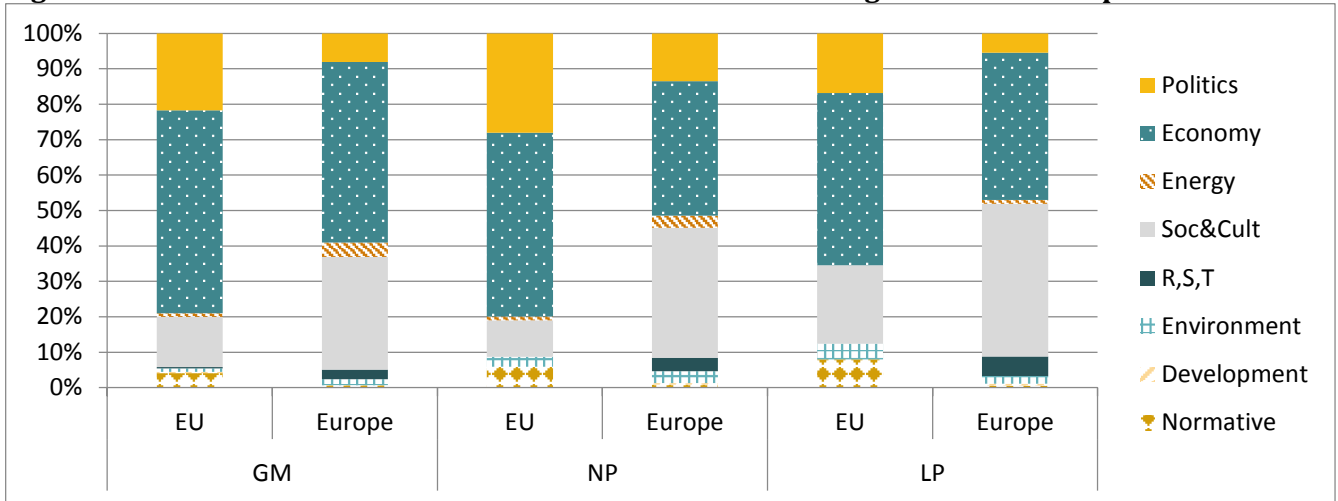
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of Canada media coverage of the EU concerns the economy (125 articles/month) and politics (55), and, to a lesser extent, social and cultural issues (32), with other topics getting little media coverage (21). In political news coverage concerning the EU, the main internal EU issue was Grexit, while most news concerning external EU politics focused on Ukraine and EU Russia sanctions. In economic news related to the EU, the state of the economy was the dominant subtheme. Finally, social and cultural news, the third most popular frame in EU-related news in the Canada, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were RS&T, development and energy.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Also other themes (RS&T, energy) are covered more often than in articles mentioning the EU. This partly coincides with the results of the survey: in Canada, respondents associated areas as economy and politics first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The Globe and Mail (GM), National Post (NP) and La Presse (LP) during the period April-June, 2015.



Media analysis results in Canada show very similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for the Canadian respondents the most attractive EU Member States are Italy, France and the UK. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and the UK.
- Meanwhile the results concerning institutions show similar tendency both for survey and media analysis EU dataset, showing ECB (as an institution) in the first place, probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frame – EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in The Globe and Mail, National Post and La Presse during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1022).



In this case tendencies in Canada are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit and the state of the economy in the EU during the media monitoring period.

[\[→ comparative overview \]](#)

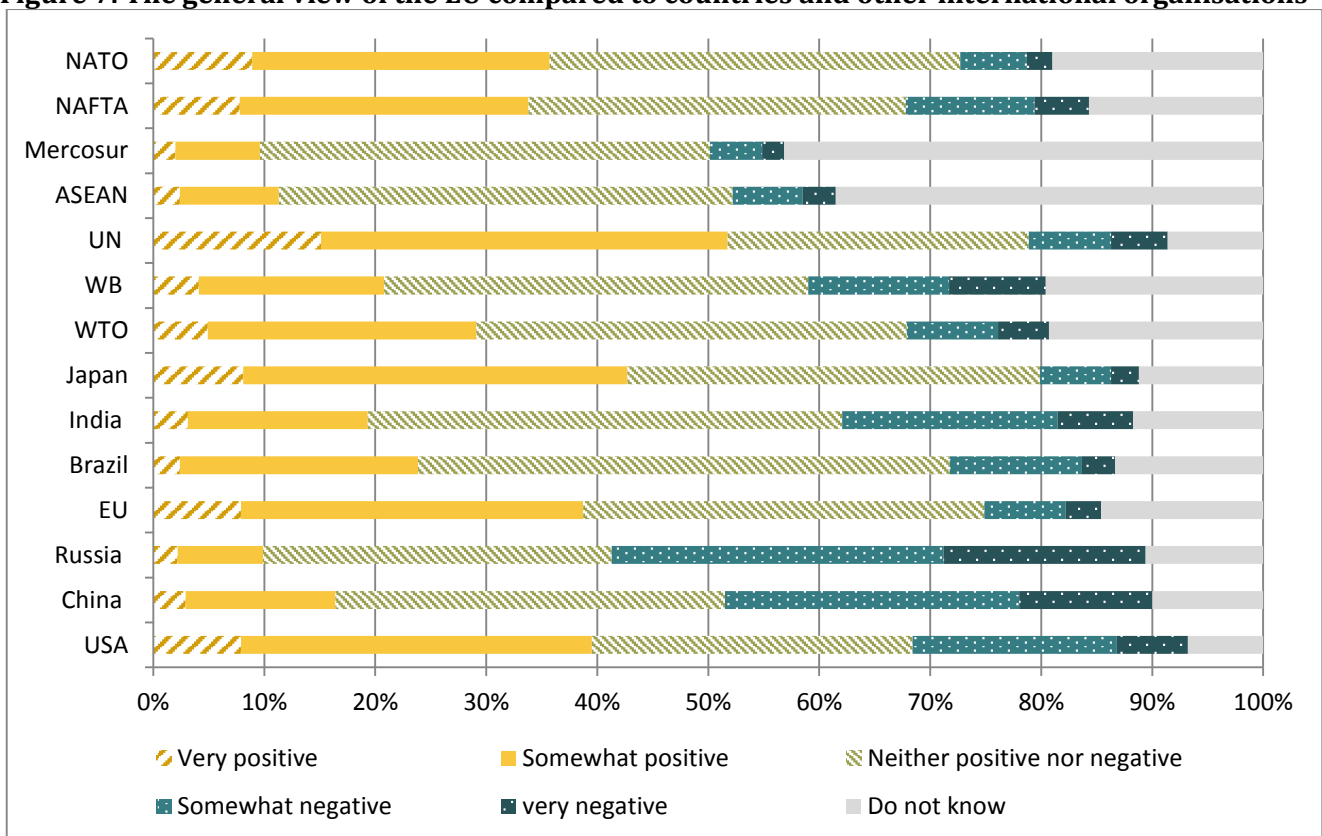
Actorness

Overall evaluation of the EU among the general public

From the point of view of the Canadian general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only Japan, and in the case of the latter – it outranked all organizations except the UN. A total of 38% of Canada respondents viewed the EU positively, compared to 10% that viewed it negatively.

Overall, media tend to portray cyclical (e.g. UK election) or outstanding events (Greek debt crisis, Grexit and Brexit). Internal EU matters are seemingly not of much interest. Furthermore, media reporting mirrors regional and cultural differences: in the Quebec newspaper, European and francophone influence prevails, while in the English-speaking papers, interest in Anglo-Saxon activities is bigger.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1022).



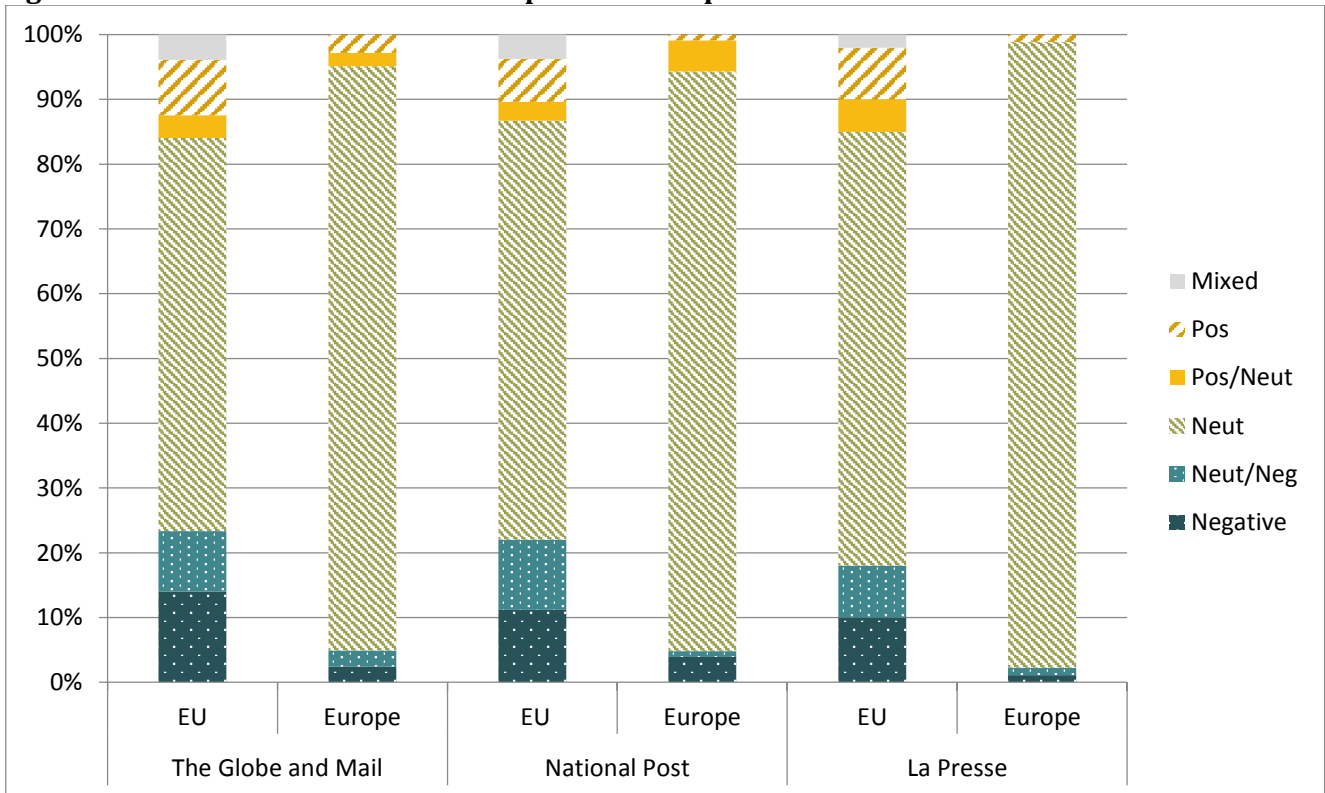
Looking at how the EU is evaluated in Canada as compared to in the other Strategic Partner countries, Canadian respondents evaluated the EU similar to the cross-country average in terms of both positive and negative evaluations.

[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Canadian newspapers evaluated it somewhat more negatively than positively – some 11% of articles across the three papers had the EU framed positively as opposed to 22% where it was framed negatively (Figure 8). The EU was consistently framed more negatively than Europe, but also had more articles with positive evaluations. Europe coverage is more balanced and also more neutral in evaluations – some 4% of all articles mentioning the EU were positive, another 4% were negative, whereas the majority was neutral.

Figure 8. Evaluation of the EU and Europe in Canada printed media

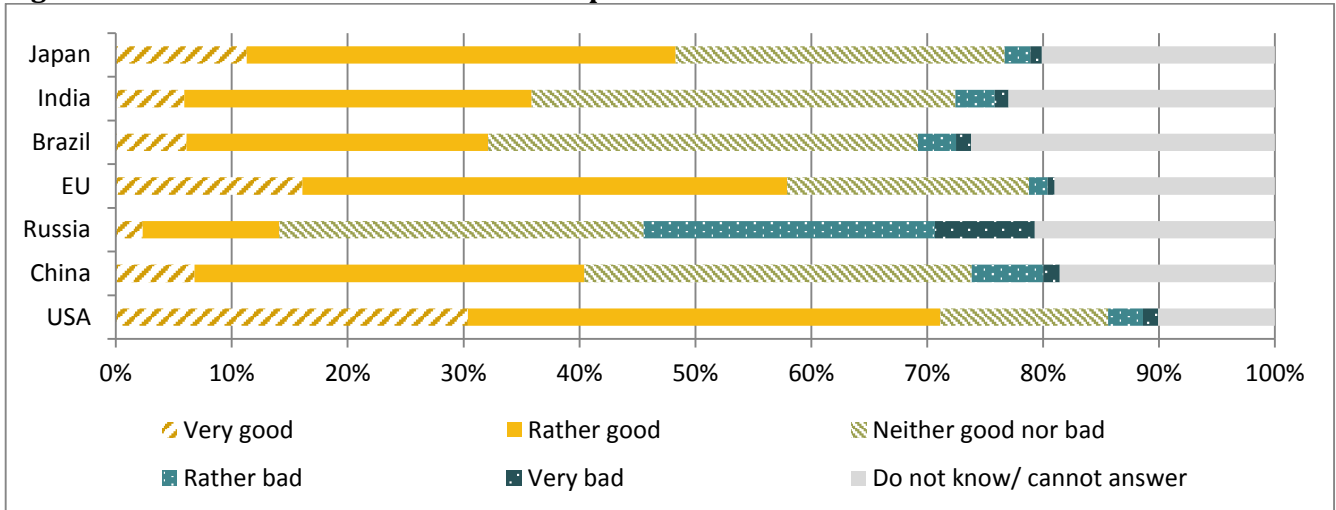


Note: Based on observation of news articles mentioning the EU and Europe in The Globe and Mail, National Post and La Presse (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU's relationship with the Canada

According to the public opinion poll, the Canadian general population views their country's relationship with the EU to be mostly good, behind only the US. Some 58% of respondents view it as good, compared to 2% that view it negatively (Figure 9). Respondents gauged Canada's relationship with the EU equally positively as their general view of the bloc (see Figure 7).

Figure 9. Evaluation of Canada's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1022).

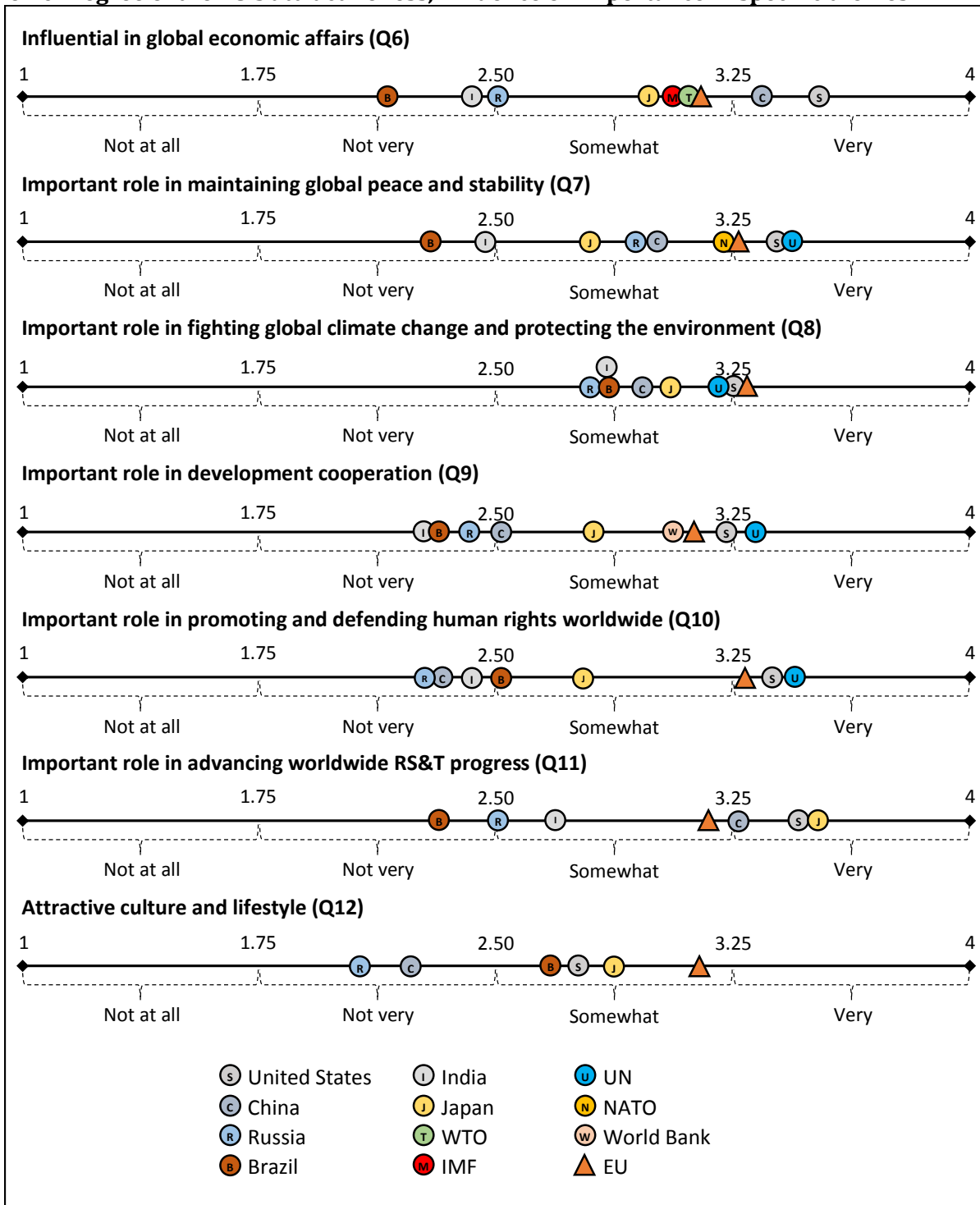


Comparing how the Canada general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, the extent of positive evaluations is close to the 10-country average, whereas it is the country with the least negative views of bilateral relations with the EU. [[→ comparative overview](#)]

Importance of the EU in selected thematic fields

Overall, the general public in Canada sees the EU as a somewhat to very influential, important and attractive international actor across the areas listed in Figure 10. Looking comparatively at which areas the EU was seen as more important, maintaining global peace, protecting the environment, and defending human rights slightly stand over others. Furthermore, the EU is among the top 3 most influential, important and attractive international actors in most of the thematic areas except RS&T. In the case of RS&T, Canadian general public found the role of Japan, the US, and China more important in advancing innovation and technological progress worldwide than the EU. Moreover, the general public in Canada sees culture and lifestyle of the EU more attractive than those of other countries used for comparison (Figure 10).

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1022). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



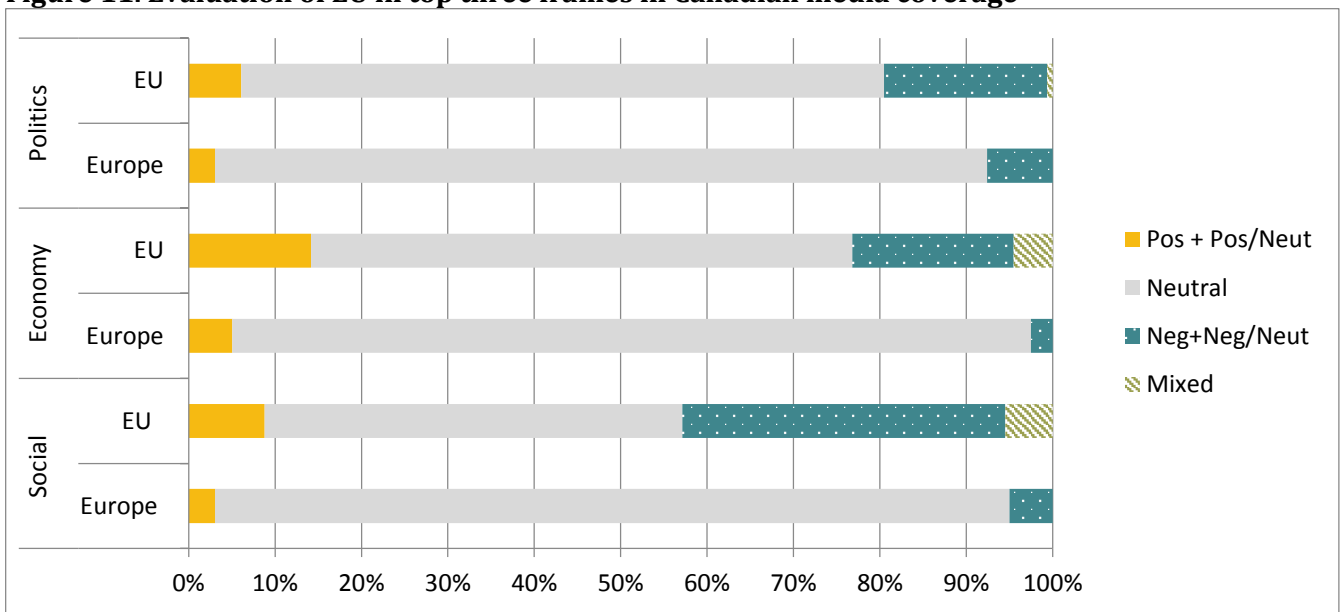
Looking comparatively at how important SP country populations gauge the EU to be across thematic fields listed in Figure 10, Canada views did not stand out across any of the selected areas, and were close to the 10-country average.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in Canadian media coverage: economy, social and politics, Europe was consistently evaluated more neutrally than the EU. The EU was more often framed negatively, particularly in the social frame. The EU received more positive coverage in the Economy frame compared with the other two areas, and compared to Europe.

Figure 11. Evaluation of EU in top three frames in Canadian media coverage



Note: Based on observation of news articles mentioning the EU and Europe in The Globe and Mail, National Post and La Presse (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

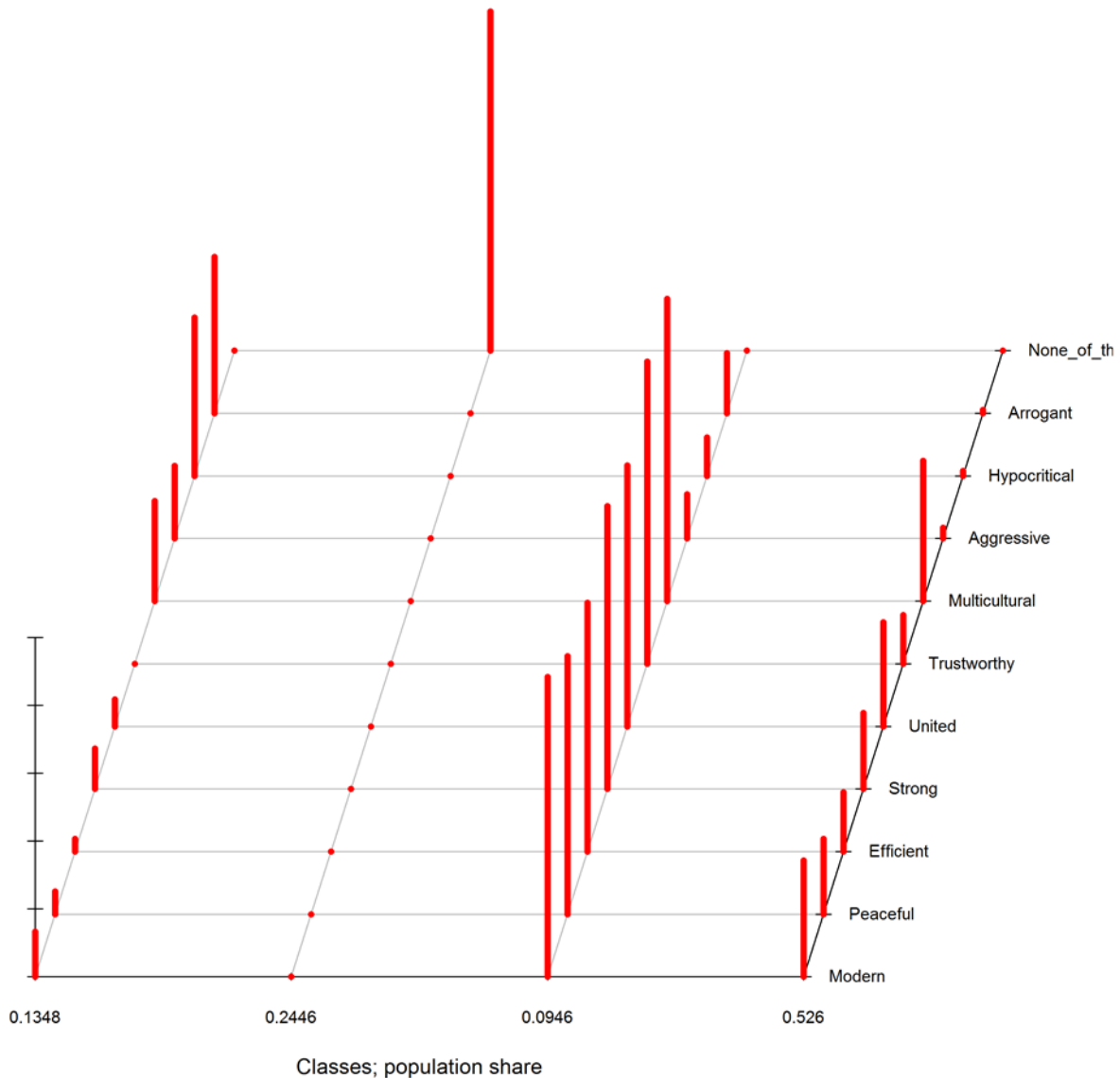
Most common descriptors used by general population in association to EU

The general population in Canada chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes among the Canadian public:

- Almost only positive but few descriptors – 52% (top 3: multicultural, modern, united).
- Mixed, but mostly positive and many descriptors – 9%.
- Mixed, but mostly negative – 13% (top 3: arrogant, hypocritical, multicultural).
- No opinion on the EU and its descriptors – 24%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the 52% class (most to the right), which used almost exclusively positive descriptors, compared to the 13% class (left-most), which used mostly negative descriptors. In Canada's case multicultural was used to describe the EU mostly in a positive sense.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1022) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all 10 SP countries except in Russia, the general population in Canada chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, the Canadian population doesn't stand out. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

Effectiveness

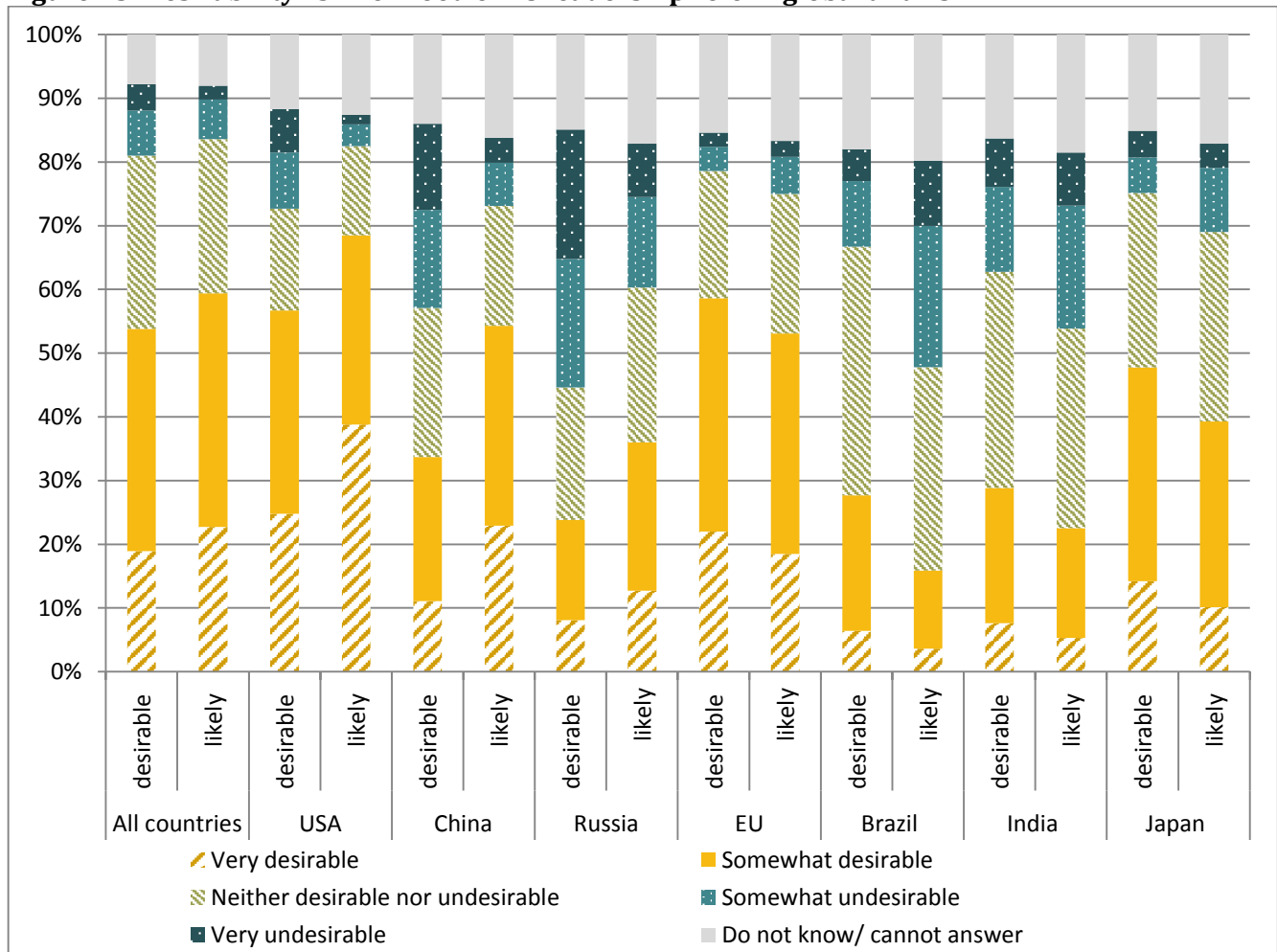
Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade,

research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public in Canada finds EU global leadership both desirable and likely. Canadians find EU as the most desirable leader among the countries used for comparison, meanwhile regarding the likelihood of it assuming this role, the EU stands behind the US, and, to lesser extent, China.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1022)

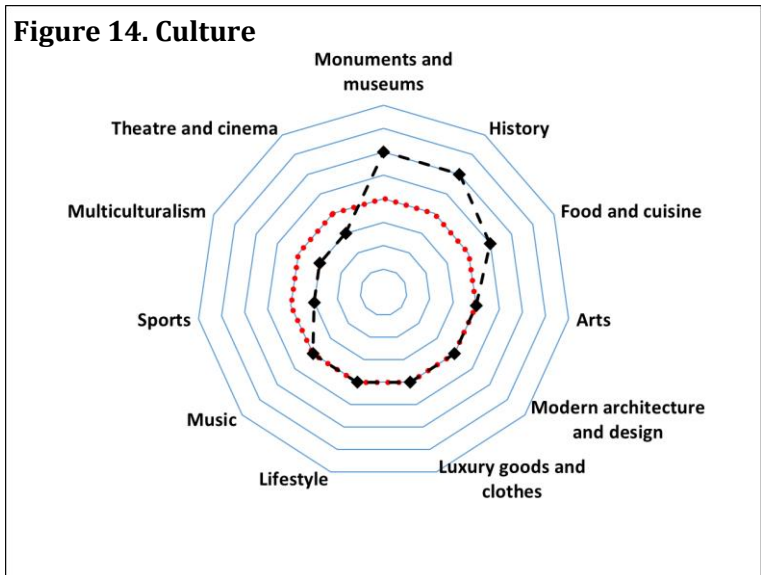


Looking comparatively at how desirable versus likely EU future global leadership is perceived to be for SP country publics, Canadians see the EU as somewhat desirable and likely to take on a leadership role, and in this respect it doesn't stand out among the SP countries on both counts and appears close to the 10-country average.

[→ comparative overview]

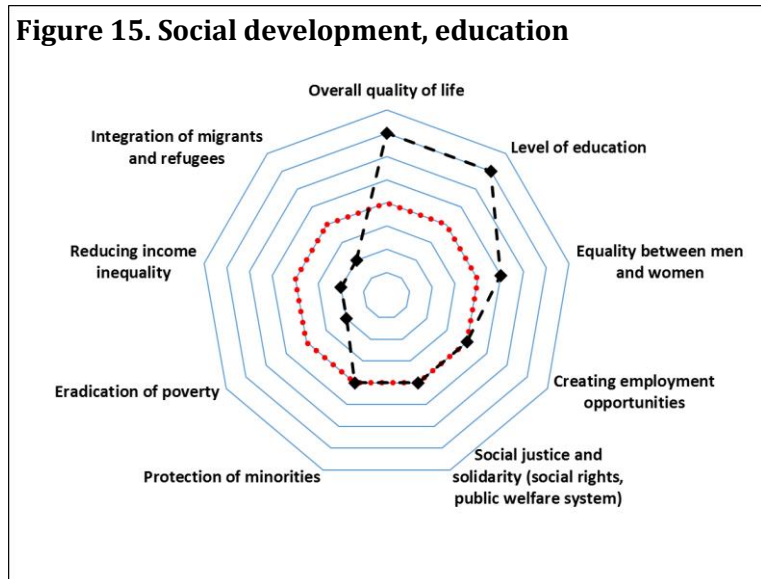
Culture

In the area of culture, the general public in Canada had the most positive views towards the EU's effectiveness in terms of its monuments and museums, as well as history. On the contrary, the theatre and cinema, as well as multiculturalism and music were less often viewed positively. Across the remaining fields, the general public in Canada were relatively more positive about the food and cuisine compared to other fields.



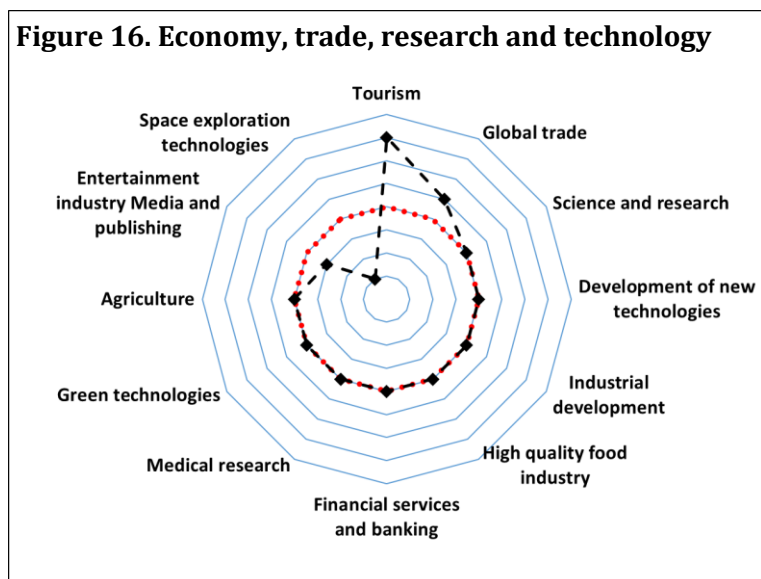
Social development and education

In the area of social development and education, Canadian respondents were most positive regarding the EU's performance in education and quality of life. They expressed least positive views in terms of integration of migrants and refugees, reduction of income inequalities and eradication of poverty. Across the remaining fields, Canadians felt relatively more positively about EU's performance in ensuring equality between men and women.



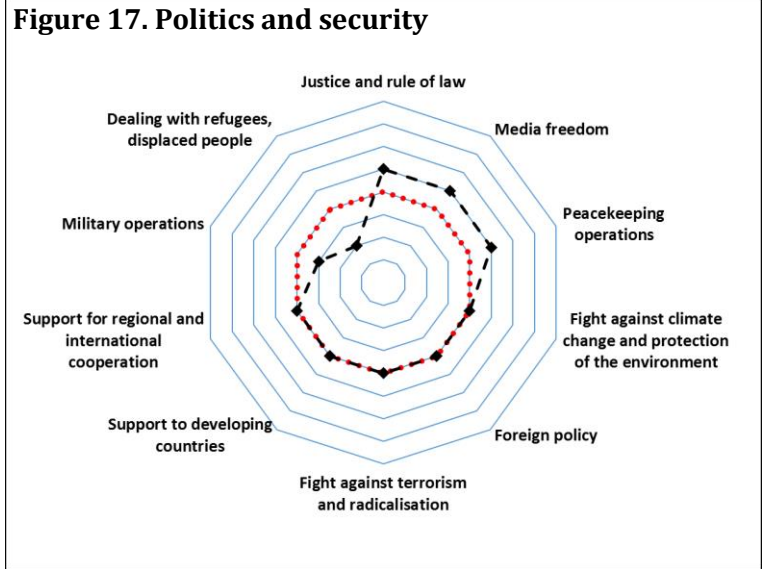
Economy and RS&T

In the area of economy and RS&T, respondents in Canada were most positive about the EU's performance in the field of tourism and the least positive about space exploration technologies. Across the remaining fields, Canadians were relatively more positive about the EU's performance in global trade and relatively less so about its performance in the entertainment industry, media and publishing.



Politics and security

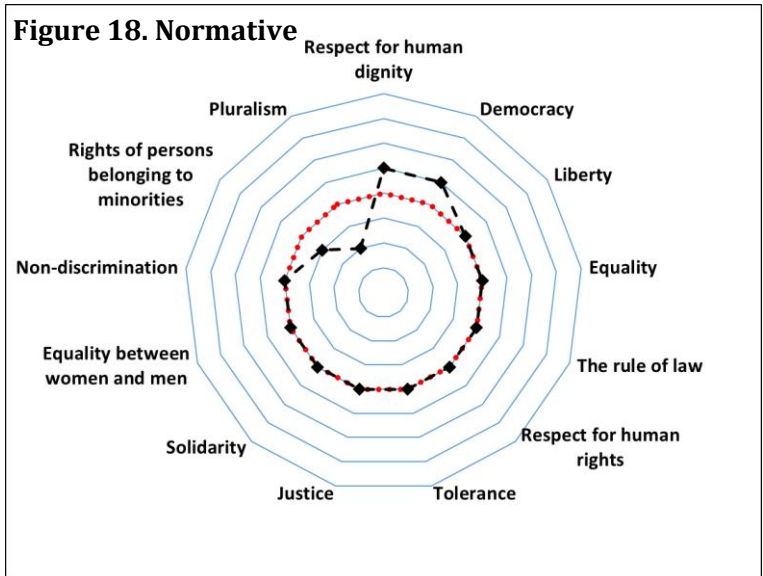
In the area of politics and security, respondents in Canada were most positive about the EU's performance in the area of media freedom, rule of law and peacekeeping operations. On the contrary, they expressed least positive views about EU's efforts in dealing with refugees. Furthermore, across the remaining fields, Canadians were less positive about the EU's performance in military operations.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1022). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

In regards to normative area, Canadian respondents reported that their views are most similar to those of the EU on the issues related to democracy and respecting human dignity. In contrast, they found EU's views on pluralism least similar to their personal views. Across the remaining areas, slightly less respondents found similarity in their personal point of view with that of the EU's in terms of minority rights.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1022). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, younger respondents were found to have a more positive general view of the EU. In terms of **gender**, women are less aware of the EU and less positive about the Canada-EU relationship.

Income was not a predictor of different perceptions among the Canadian public. **Working status**, however, did feature among explanatory criteria – employed respondents had a more positive general view of the EU and Canada-EU bilateral relations. **Education** was also significant, in that the more educated respondents were more likely to have a more positive view of the EU and Canada-EU relations, find the EU more attractive and more desirable and likely leader. Lastly, the **region of residence** accounted for some differences in perceptions – respondents from British Columbia found the EU to be more attractive.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that feel they have **sufficient information on the EU**, and have had **contact with Europe**, reported having a more positive general view of the EU. Furthermore, Canadians that have contact with Europe are also more positive about Canada-EU bilateral relations, find the EU more attractive and a more desirable and likely global leader. Lastly, this group also found the EU to have more influence within specific thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress).

Table 1. Demographic and familiarity with Europe predictors of perceptions

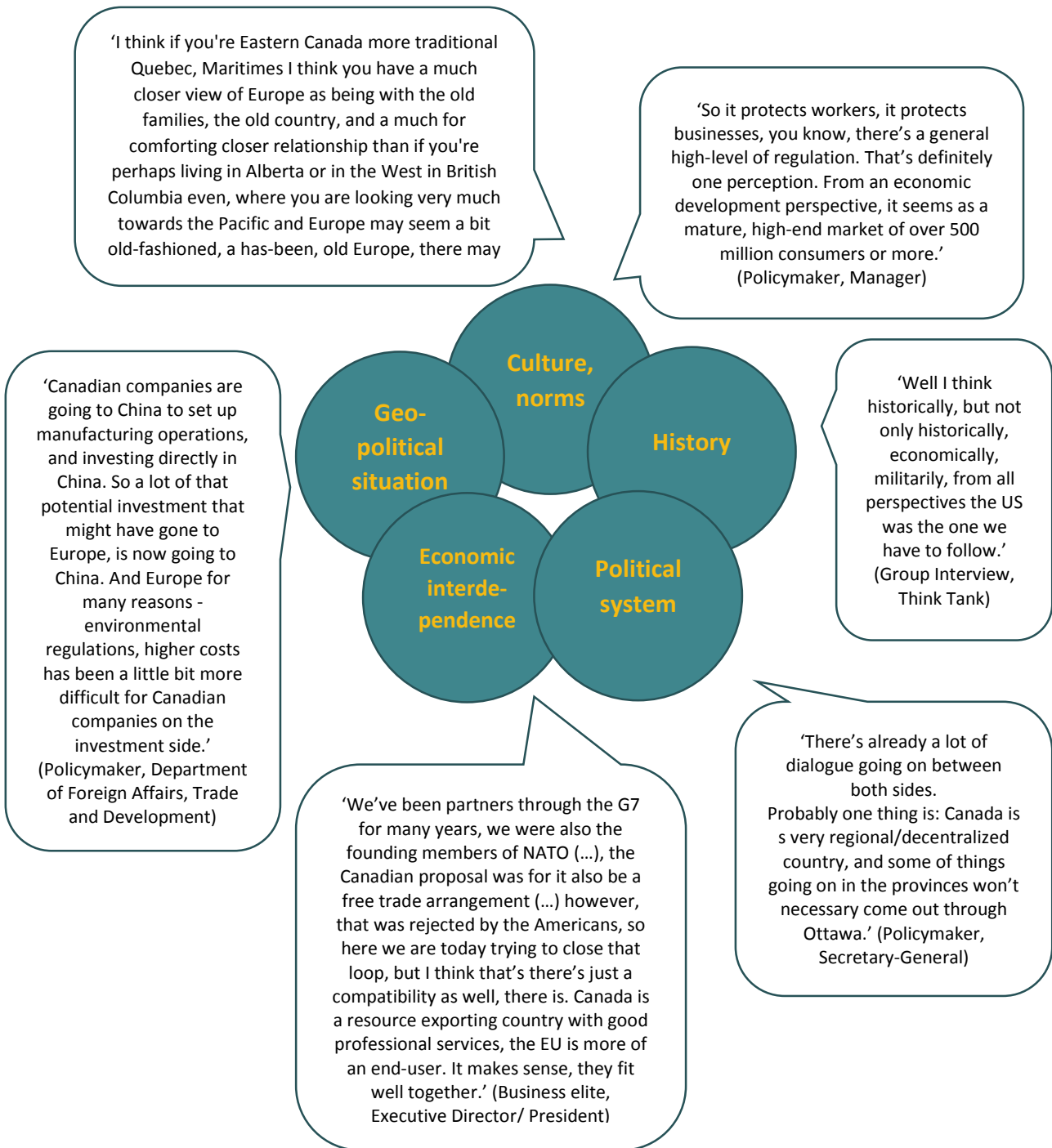
	Awareness of EU	General view of EU	Canada-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	...	Women ↓	...	...	...	...
Age	...	Younger ↑	...	...	...	...	...
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	...	More informed ↑	...	...	...	...	...
Income
Level of education	...	More educated ↑	More educated ↑	More educated ↑	More educated ↑	More educated ↑	...
Working status	...	Employed ↑	Employed ↑	...	...	...	...
Region	British Columbia ↑	...	...	...

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N=1022). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Canadian views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



6 CHINA



Executive Summary

In China awareness of the EU compared to a list of preselected countries provided in the survey is below most of the countries, above only Brazil, but above most other international organisations, with the exception of the UN and the WTO. EU visibility in terms of how frequently people hear about it is rather high – as many as 73% of respondents reported that they hear about it almost every day or at least once a week. Main sources for getting information on the EU are online media (including online versions of print media), TV channels and social media. Most visible themes of EU news in print media used for analysis are economy, politics and social and culture, whereas in Europe news social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in China. Respondents find the EU as somewhat influential across different thematic areas, and it appears among the top 3 most influential, important or attractive international actors only in the areas of advancing worldwide Research, Science and Technology (RS&T) and upholding an attractive lifestyle. Most common descriptors for the EU used by China respondents were ‘multilateral,’ ‘modern’ and ‘strong.’ Overall, most of the articles in Chinese newspapers framed the EU neutrally, however almost twice as many of the remaining articles contained a negative rather than a positive assessment. Europe was also mostly framed neutrally, but in contrast to the EU, twice as many of the remaining articles framed it positively rather than negatively. Overall, the EU is rather visible in Chinese media, especially when the stories have a local hook (e.g. the 17th China-EU Summit attended by Li Keqiang; Mogherini’s visit to Beijing and the 40th anniversary of China-EU relation).

The Chinese public ranks EU leadership in global affairs as desirable, in this respect it is outranked by only China itself, and comparable to Russia. Moreover, the Chinese consider the US and China more likely to assume global leadership than the EU and Russia, making the latter two the third most likely actors to take on such a role. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields of culture, the EU is most positively regarded in terms of luxury goods and clothes, and least positively for the theatre and cinema, as well as sports and cuisine. In social development and education, the EU is seen best for education and quality of life and relatively least so for integration of migrants. In economy and RS&T, the EU is best regarded for tourism, global trade and high quality food industry, and least so for entertainment industry, media and publishing. As regards politics and security, respondents in China were most positive about EU’s performance in terms of fighting terrorism, maintaining the rule of law and supporting regional or international cooperation, and least positive about its efforts in dealing with refugees.

[\[→ Full Country Chapter: Final Report Chapter 3.3 p.99\]](#)
[\[→ List of potential partners: Final Report Table 24: p.267\]](#)

CHINA



Context

China became EU's Strategic Partner in 2003. Related key documents: EU-China 2020 Strategic Agenda for Cooperation (2013).

Currently there is no EU-China FTA initiative.

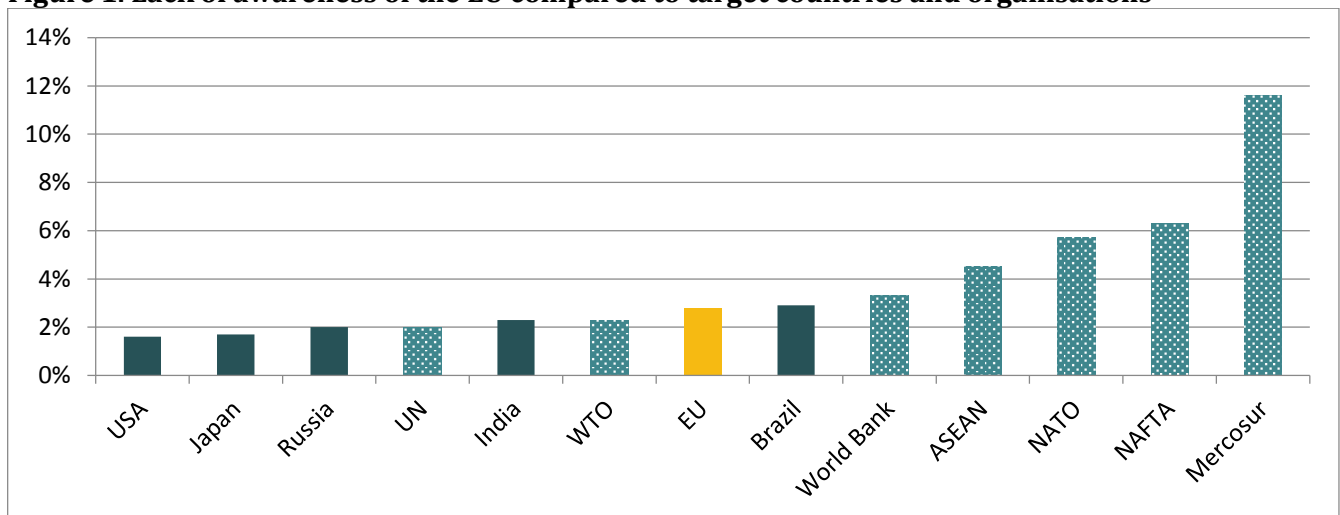
EU and China form one of the world's largest trade relationships. China is the EU's main source of imports and one of EU's fastest growing export markets. EU is China's biggest source of imports. China-EU trade amounts to over €1 bn/ day. Trade in goods creates €467 bn, trade in services - €54 bn (2014 data).

Visibility

Awareness of the EU in China – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in China awareness of the EU is below that of most of the countries used for comparison (surpassing only Brazil). The Chinese general public, however, finds the EU more visible than most other international organisations, with the exception of the UN and WTO.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1410).



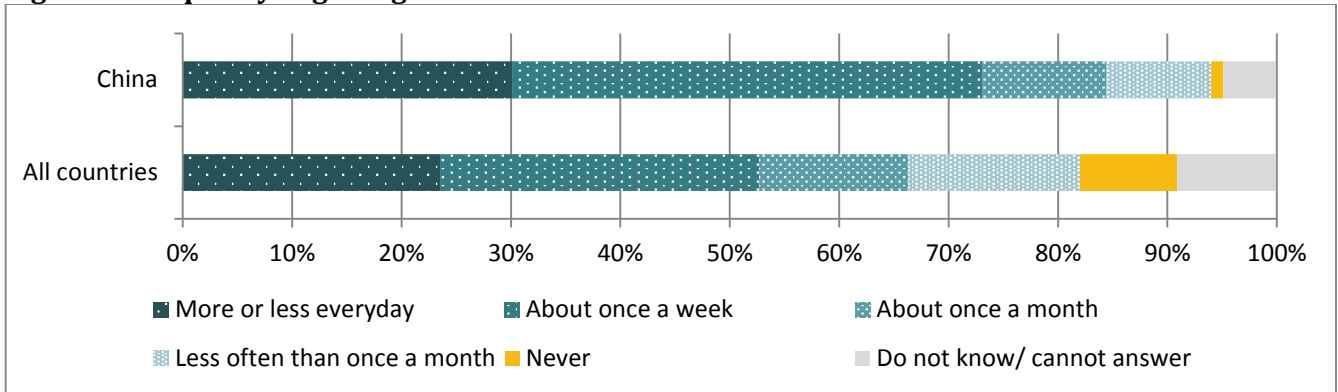
Compared to other countries, awareness of the EU in China (3% unaware/ 97% aware) is relatively the highest, together with the ones of Russia, Mexico and South Korea (all 4% unaware/ 96% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in the China is relatively high. Most China respondents (43%) stated that such information would reach them about once a week. The other two largest respondent groups hear or read about the EU more or less everyday (30%) or about once a month (11%). Meanwhile, the smallest group of China respondents (1%) stated that they hear or read about the EU more or less every day.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1410).



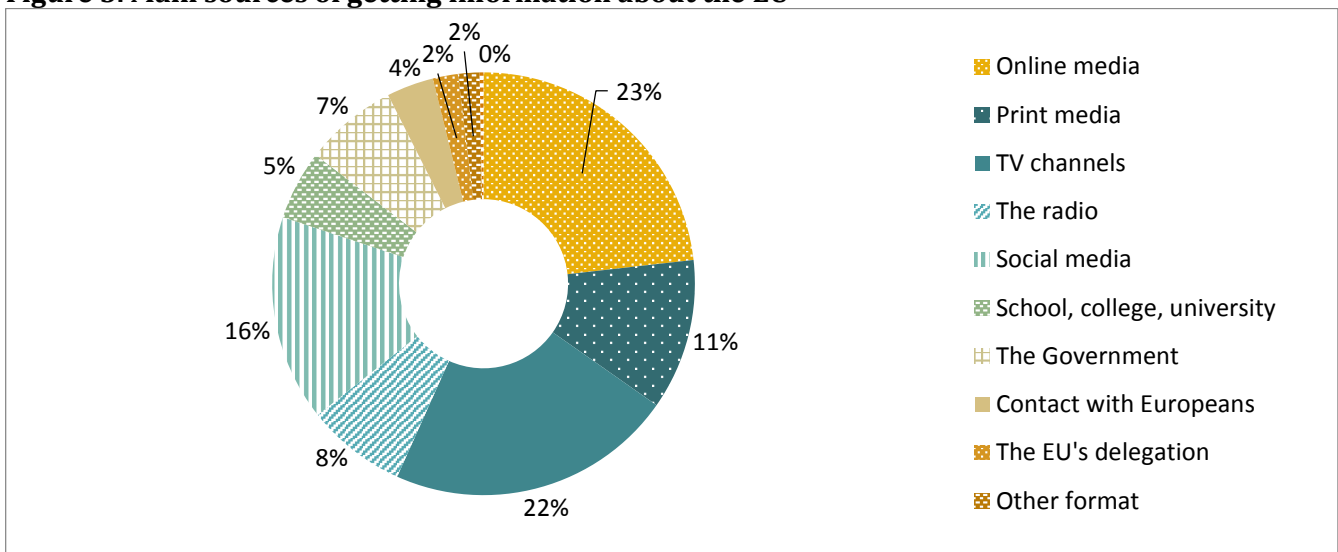
The frequency of hearing or reading about the EU in China, as compared to results in other Strategic Partner countries, is relatively high. The share of Chinese respondents who stated that information about the EU would never reach them is the lowest compared to results in other SP countries.

[\[→ comparative overview\]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in China are online media (23%), TV channels (22%) and social media (16%). Meanwhile, print media (11%) in comparison proved a less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 1324).



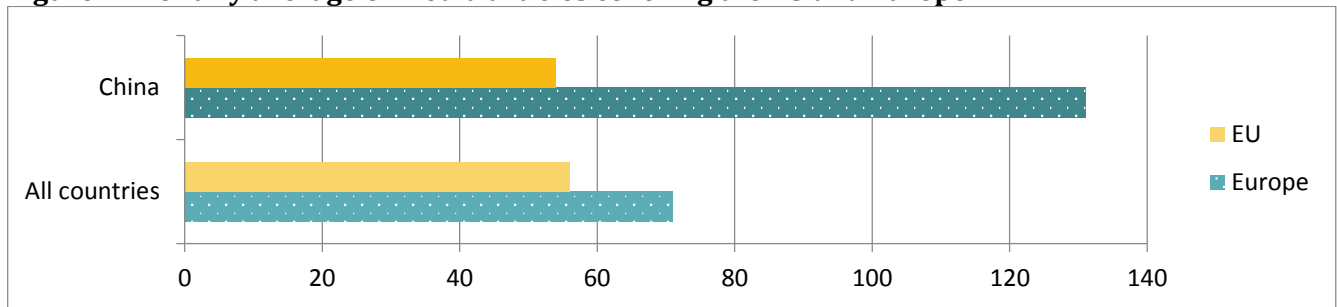
Compared to the other 9 SP countries, China respondents were the only ones that marked a sequence of most popular media sources with online media rated in the first place instead of TV channels.

[→ comparative overview]

Volume of media articles

According to media analysis, the selected China popular and business print media outlets mention Europe (monthly average – 131 articles) more frequently than the EU (54).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in People’s Daily, Global Times and 21st Century Business Herald (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, China is among the countries with the most articles covering Europe. Also, since less articles in China were related to the EU, it coincides with the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

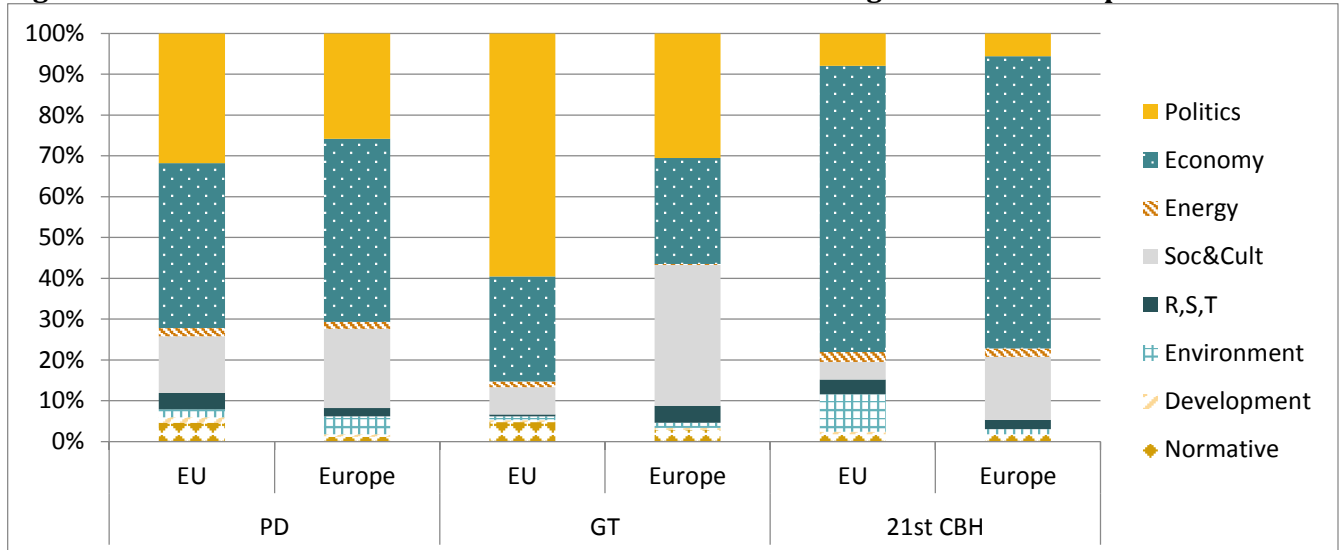
[→ comparative overview]

Most and least visible themes

The majority of China media coverage of the EU concerns the economy (77 articles/month) and politics (62), and, to a lesser extent, social and cultural issues (14), with other topics getting little media coverage (22). In economic news related to the EU, the state of the economy was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on EU-Russia relations. Finally, social and cultural news, the third most popular frame in EU-related news in China, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were development, energy and RS&T

Concerning the proportion of the most visible themes related to Europe, though in this case the economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. However, other themes (normative, environment) are covered in Europe news less often than in articles mentioning the EU. This partly coincides with the results of the survey: in China, respondents associated such areas as economy and politics first and foremost with the EU, whereas they more often linked social development, culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in People’s Daily (PD), Global Times (GT) and 21st Century Business Herald (21st CBH) during the period April-June, 2015.



Media analysis results in China show very similar tendencies as in EU media coverage in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview\]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for China respondents the most attractive EU Member States are France, Germany and the UK. However, media analysis results of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Germany, Greece (related to Grexit) and the UK (related to Brexit).
- The results concerning institutions were similar in both, the survey, and media analysis of the EU dataset, showing the ECB (as an institution) in second place, meanwhile rating the EU Council and EC in the first place, respectively.
- The most visible individuals, as shown only by the media analysis, are again related to the dominant sub-frames – the EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in People’s Daily, Global Times and 21st Century Business Herald during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1410).



In this case tendencies in China are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit, Brexit and the state of the economy in the EU during the media monitoring period. However, according to media analysis, China is the only SP country where an EU official (J. Juncker) was rated first among the most visible people.

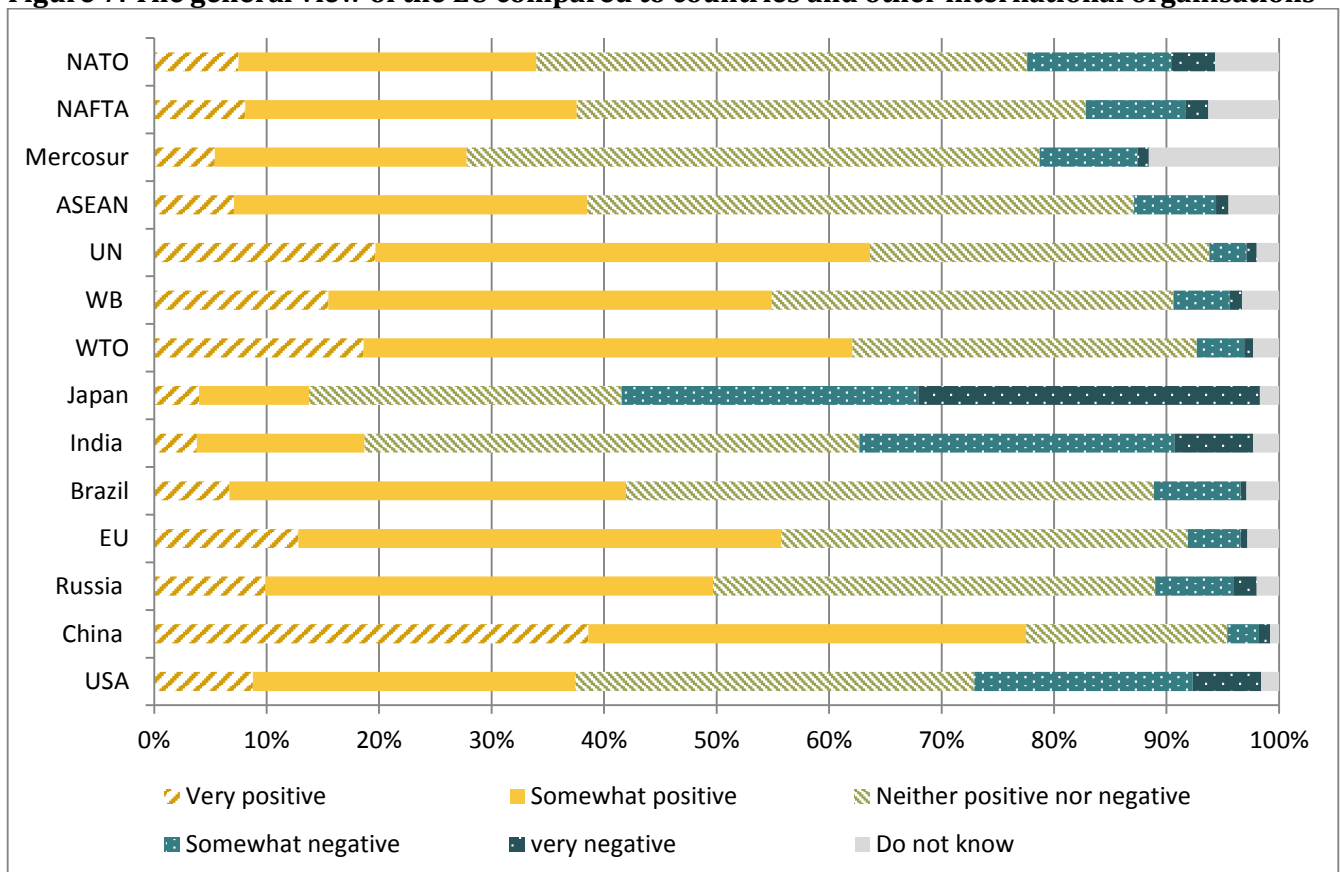
[\[→ comparative overview\]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of the Chinese general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only China itself, and in the case of the latter – it outranked all organizations except the UN and the WTO. A total of 56% of Chinese respondents viewed the EU positively, compared to 5% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1410).



Looking at how the EU is evaluated in China as compared to in the other Strategic Partner countries, evaluations of Chinese respondents were close to the 10-country average, with neither the extent of positive nor negative evaluations standing out.

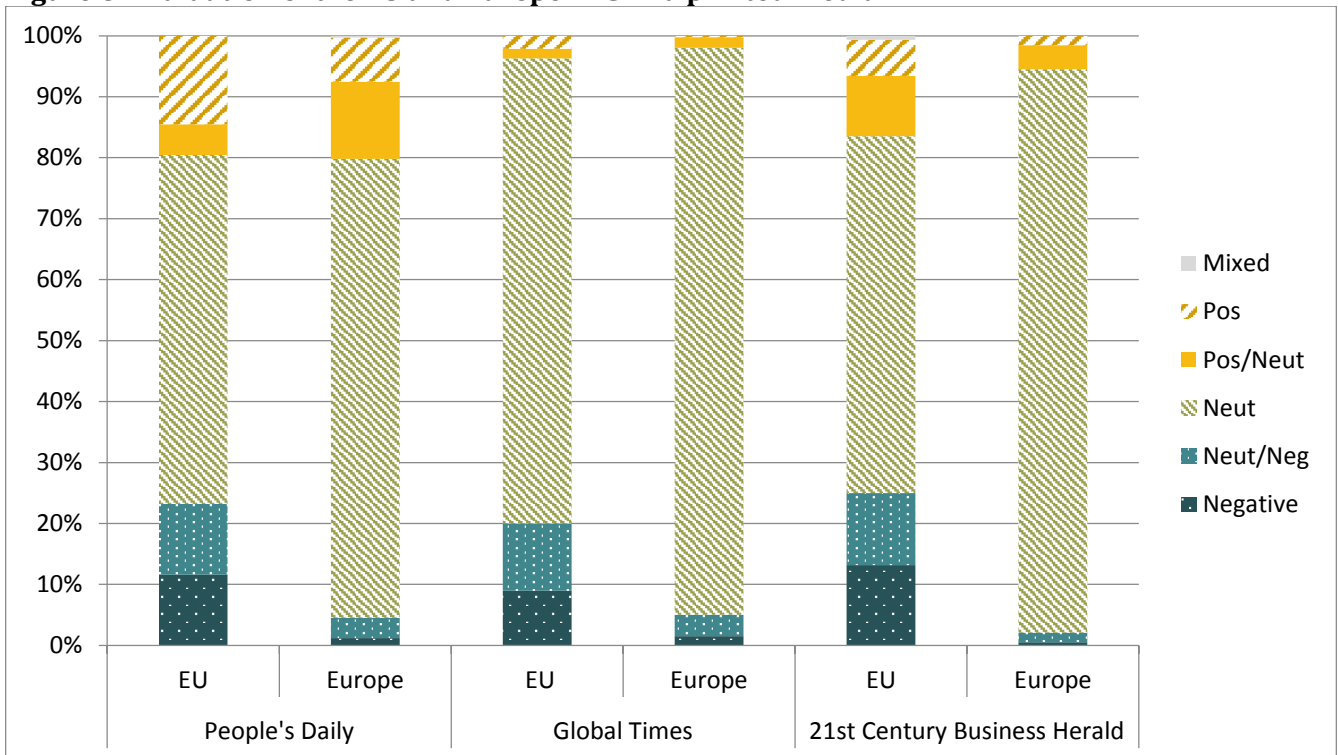
[\[→ comparative overview\]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Chinese newspapers evaluated it somewhat more negatively than positively – some 12% of articles had the EU framed positively as opposed to 22% where it was framed negatively (Figure 8). Europe coverage was largely neutral, with only 8% of articles mentioning Europe evaluated positively and another 4% negatively. Comparing EU and Europe coverage, the EU articles were evaluated relatively more negatively, albeit also received more evaluations than Europe.

Overall, the EU is rather visible in Chinese media, especially when the stories have a local hook (e.g. the 17th China-EU Summit attended by Li Keqiang; Mogherini’s visit to Beijing and the 40th anniversary of China-EU relation).

Figure 8. Evaluation of the EU and Europe in China printed media

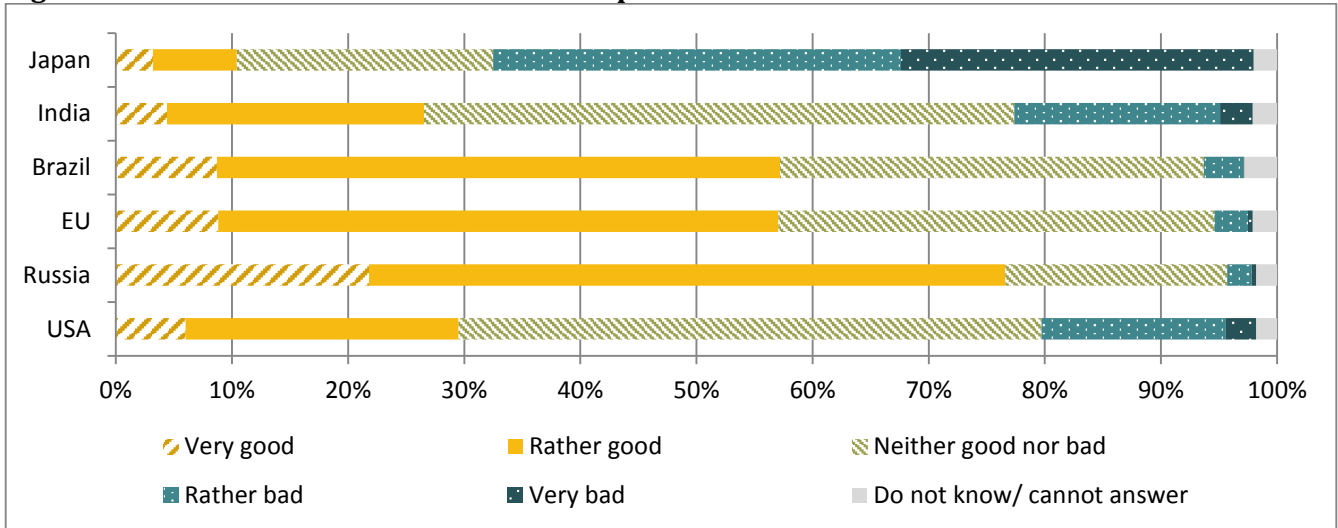


Note: Based on observation of news articles mentioning the EU and Europe in the People’s Daily, Global Times and 21st Century Herald (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with China

According to the public opinion poll, the Chinese general population views their country’s relationship with the EU to be mostly good, behind Russia and similarly to Brazil. Some 57% of respondents view it as good, compared to 3% that view it negatively (Figure 9). As concerns Chinese respondents, their general view of the EU and that of China-EU relations did not differ.

Figure 9. Evaluation of the China's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1410).



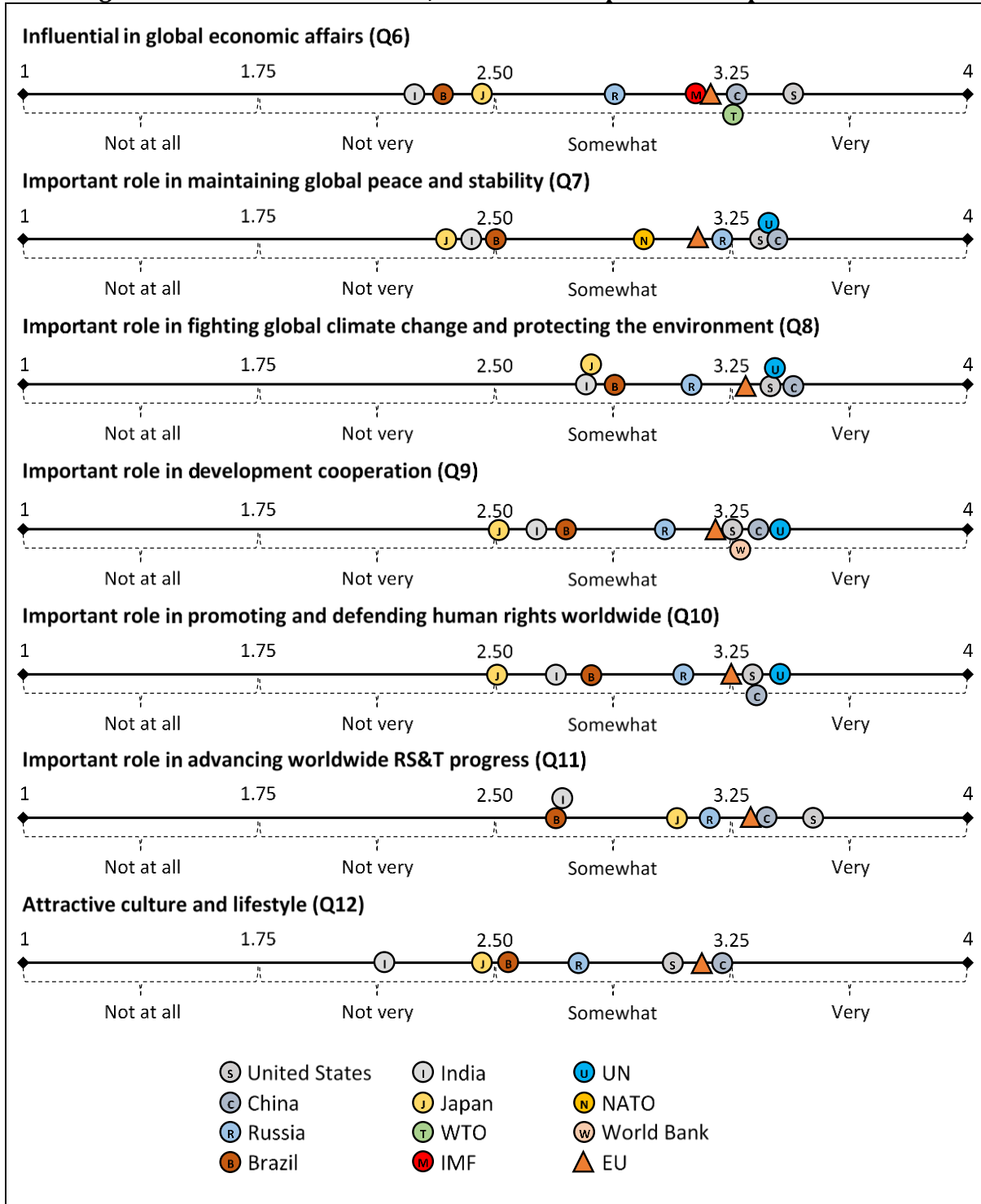
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, the China doesn't stand out, and the extent of positive and negative evaluations is close to the 10-country average.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in China sees the EU as a somewhat to very influential, important and attractive international actor across the areas listed in Figure 10. Looking comparatively in which areas the EU was seen as the most important, protecting the environment, and advancing worldwide RS&T stand over others. Furthermore, the EU is among the top 3 most important and attractive international actors only in the areas of advancing worldwide RS&T and upholding an attractive lifestyle. It is among the top 4 actors in all remaining areas except development cooperation and global peace, where it appears among the top 5 most important international actors. In all the thematic areas where the EU is among the top 4 or 5 actors, the general public in China consistently found the US, China and the UN or other multilateral organizations as more important than the EU.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1410). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



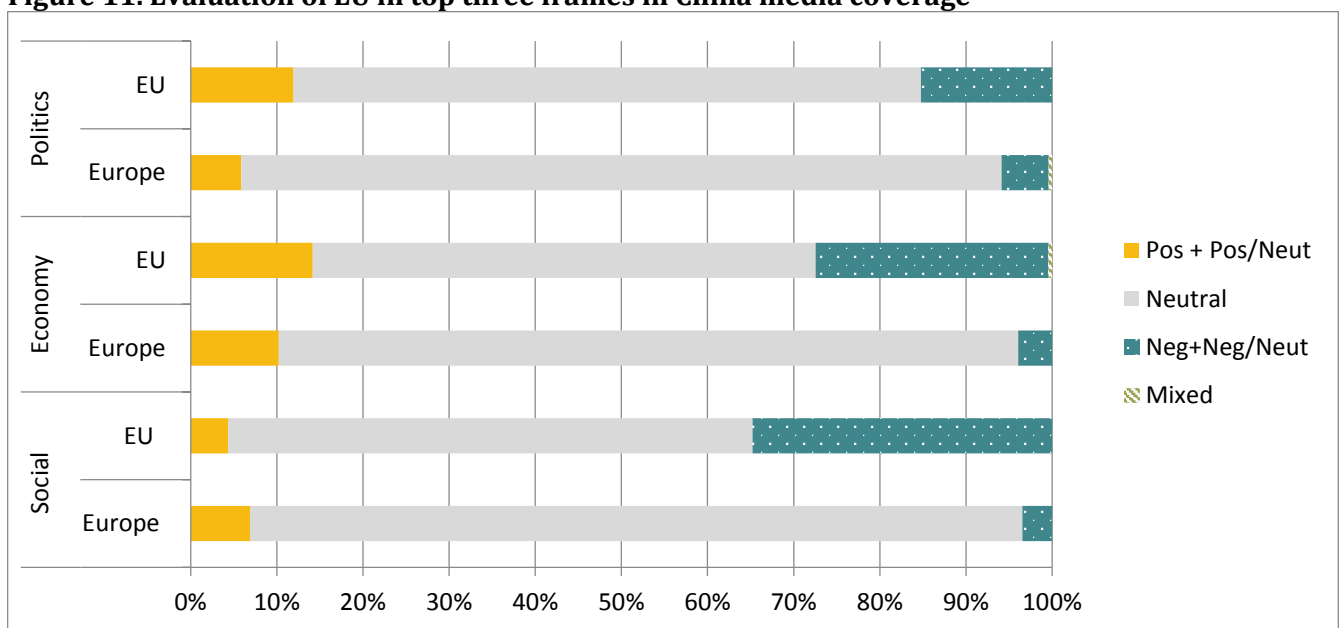
Looking comparatively at how important SP country populations find the EU across thematic fields listed in Figure 10, in China it is seen as somewhat to very important across the different areas, albeit relatively more important in advancing worldwide RS&T progress than in other countries.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in Chinese media coverage: economy, social and politics, Europe was consistently evaluated more neutrally than the EU. The EU was more often framed negatively, particularly in the social and economic frames.

Figure 11. Evaluation of EU in top three frames in China media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the People’s Daily, Global Times and 21st Century Herald (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

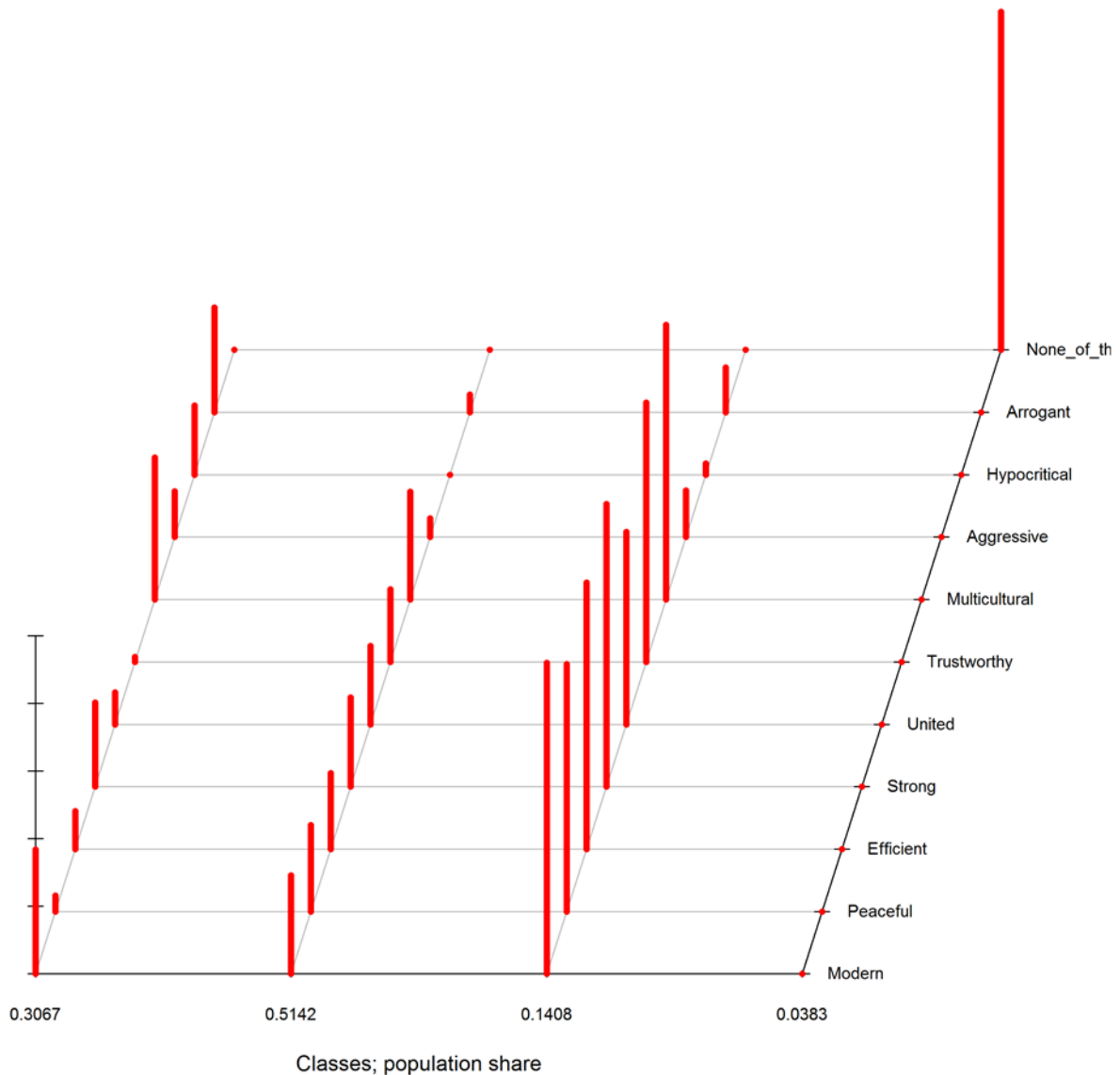
Most common descriptors used by general population in association to EU

The general population in China chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in China:

- Mixed, but mostly positive, few descriptors – 51% (top 3: multicultural, modern, strong).
- Mixed, but mostly positive and many descriptors – 5%.
- Mixed, but mostly negative – 3% (top 3: multicultural, arrogant, hypocritical).
- No opinion on the EU and its descriptors – 3%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it’s viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the two classes that used mostly positive descriptors (51% and 5% classes), and that of the 3% class, which used mixed, but mostly negative descriptors.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1410) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all other 9 SP countries except in Russia, the general population in China chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, the Chinese population doesn't stand out, only in that a very small percentage did not have an opinion, and a relatively small percentage fell into the class that chose mostly negative descriptors. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

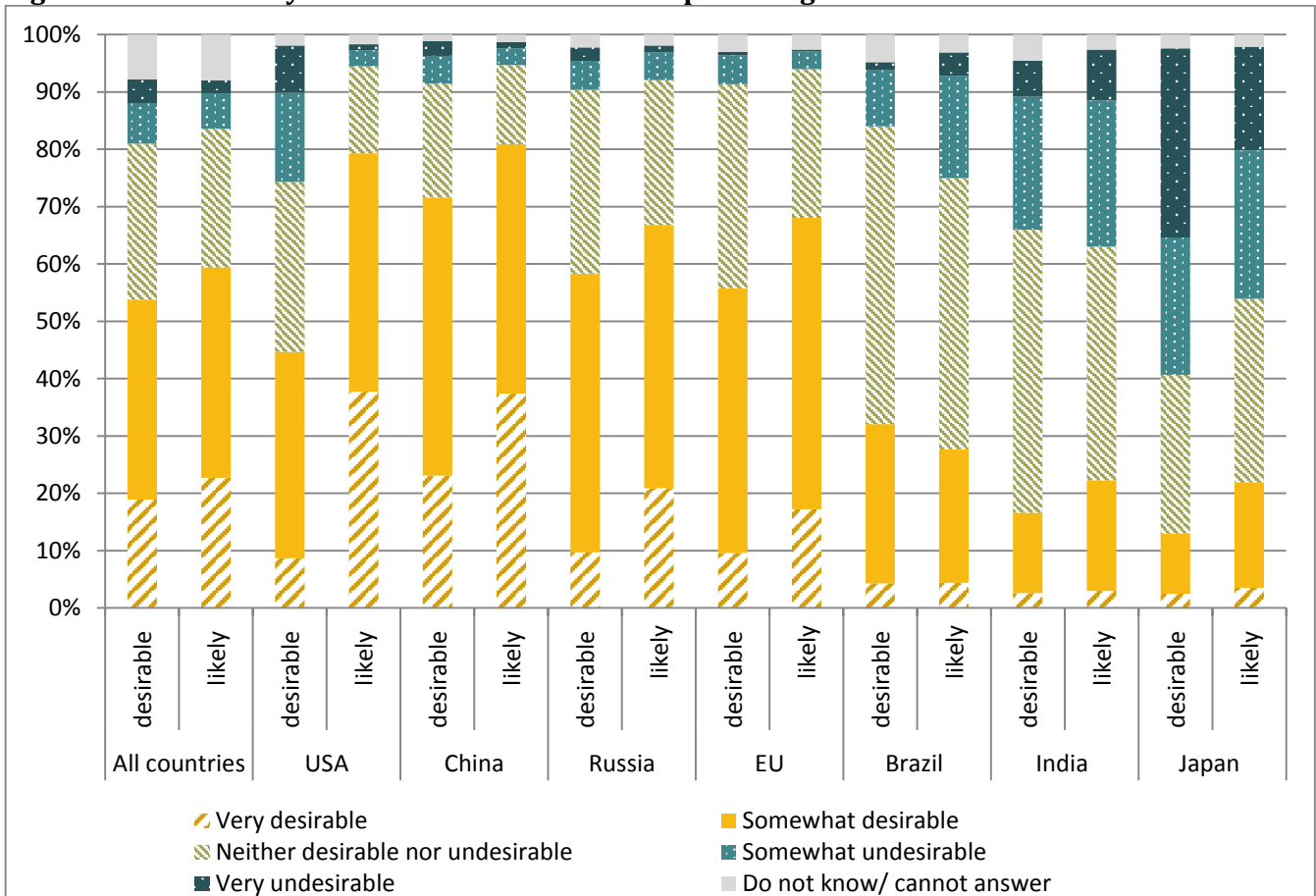
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the Chinese general public finds EU global leadership as somewhat desirable and, to a larger extent, likely. Looking at desirability of its leadership, the EU falls behind China itself and ranks similarly to Russia, meanwhile regarding the likelihood of it assuming this role, the EU is outranked by China and the US, and again fares similarly to Russia.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1410)

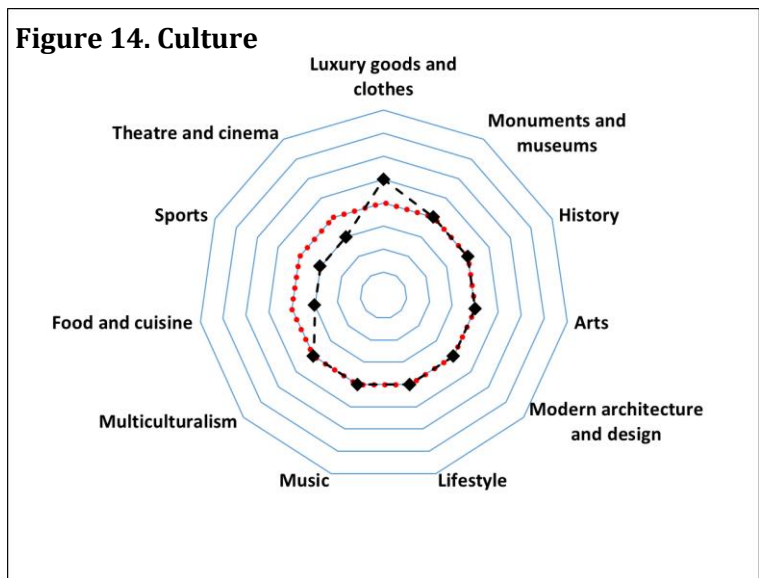


In terms of how desirable and likely EU's future global leadership is perceived by SP country publics, in China it is seen as rather likely, and in terms of desirability, China doesn't stand out and is close to the 10-country average.

[\[→ comparative overview \]](#)

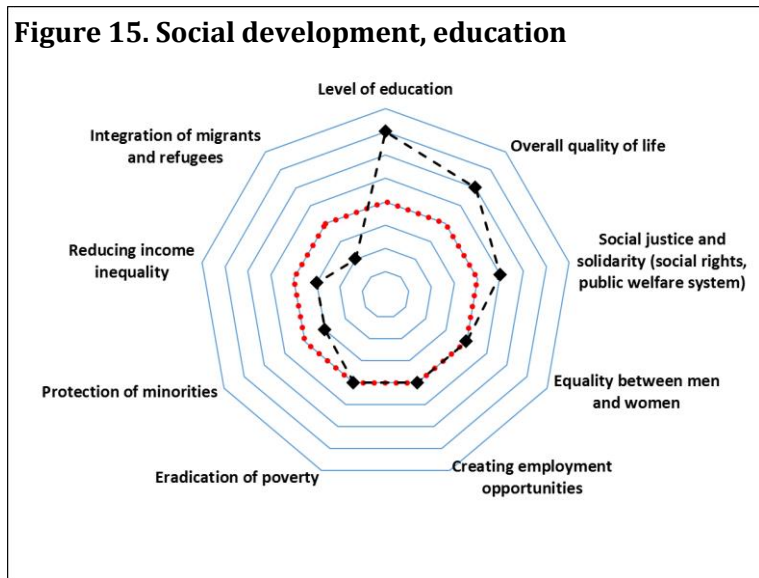
Culture

In the area of culture, the general public in China had the most positive views towards the EU's effectiveness in terms of luxury goods and clothes. On the contrary, the theatre and cinema, food and cuisine, as well as sports were less often viewed positively.



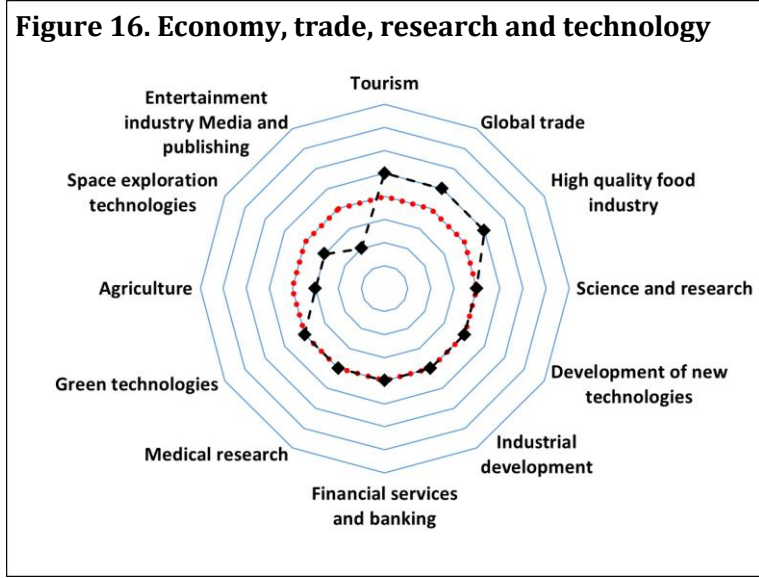
Social development and education

In the area of social development and education, Chinese respondents had the most positive views regarding EU's performance in terms of education and quality of life. On the other hand, they expressed least positive views in terms of integration of migrants and refugees. Across the remaining fields, relatively more positive views were expressed in terms of EU's performance in ensuring social justice. Furthermore, relatively less positive views were expressed in terms of EU's performance in reduction of income inequalities and protection of migrants.



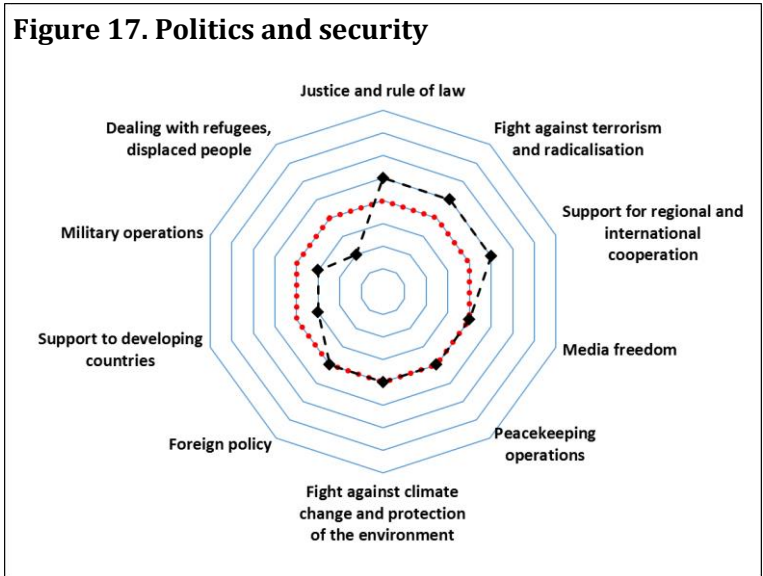
Economy and RS&T

In the area of economy and RS&T, respondents in the China were most positive about the EU's performance in the fields of tourism, global trade, and the food industry. In contrast, they expressed least positive views towards the field of entertainment industry, media and publishing. Across the remaining fields, the Chinese were relatively less positive about EU's performance in the fields of agriculture and space exploration technologies.



Politics and security

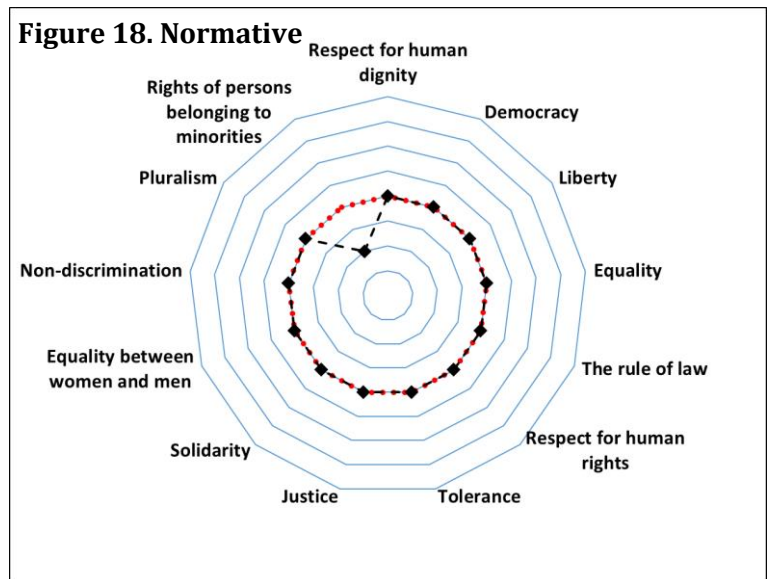
In the area of politics and security, respondents in China were most positive about the EU’s performance in terms of fighting terrorism, maintaining the rule of law, and supporting regional and international cooperation. On the contrary, they expressed least positive views about EU’s efforts in dealing with refugees. Furthermore, across the remaining fields, the Chinese were relatively less positive about the EU’s performance in military operations and supporting developing countries.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1410). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

Across different normative issues, Chinese respondents reported that their views are similar to those of the EU on all of the listed issues except minority rights. As for the latter, less respondents found similarity in their personal point of view with that of the EU than in terms of any other normative issue.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1410). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, in China younger respondents were more likely to see the EU as influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress), whereas older respondents were more positive about the China-EU relationship. **Gender**, on the other hand, was not linked to differences in EU perceptions among the Chinese public.

Higher **income** was linked to more positive views generally and specifically across themes. This group also had a better view of the China-EU relationship, found the EU more attractive and a more desirable and likely global leader. **Working status** featured among explanatory criteria – respondents who were employed at the time of the study reported having a more positive general view of the EU and the China-EU relationship, and found the EU to be a more likely global leader. Lastly, the **region of residence** and **education** did not account for differences in perceptions.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that feel they have **sufficient information on the EU**, and have had **contact with Europe**, reported having a more positive general view of the EU and the China-EU relationship, found the EU to be more attractive, and more influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). Those with contact with the EU also found the EU to be a more desirable and likely global leader.

Table 1. Demographic and familiarity with Europe predictors of perceptions

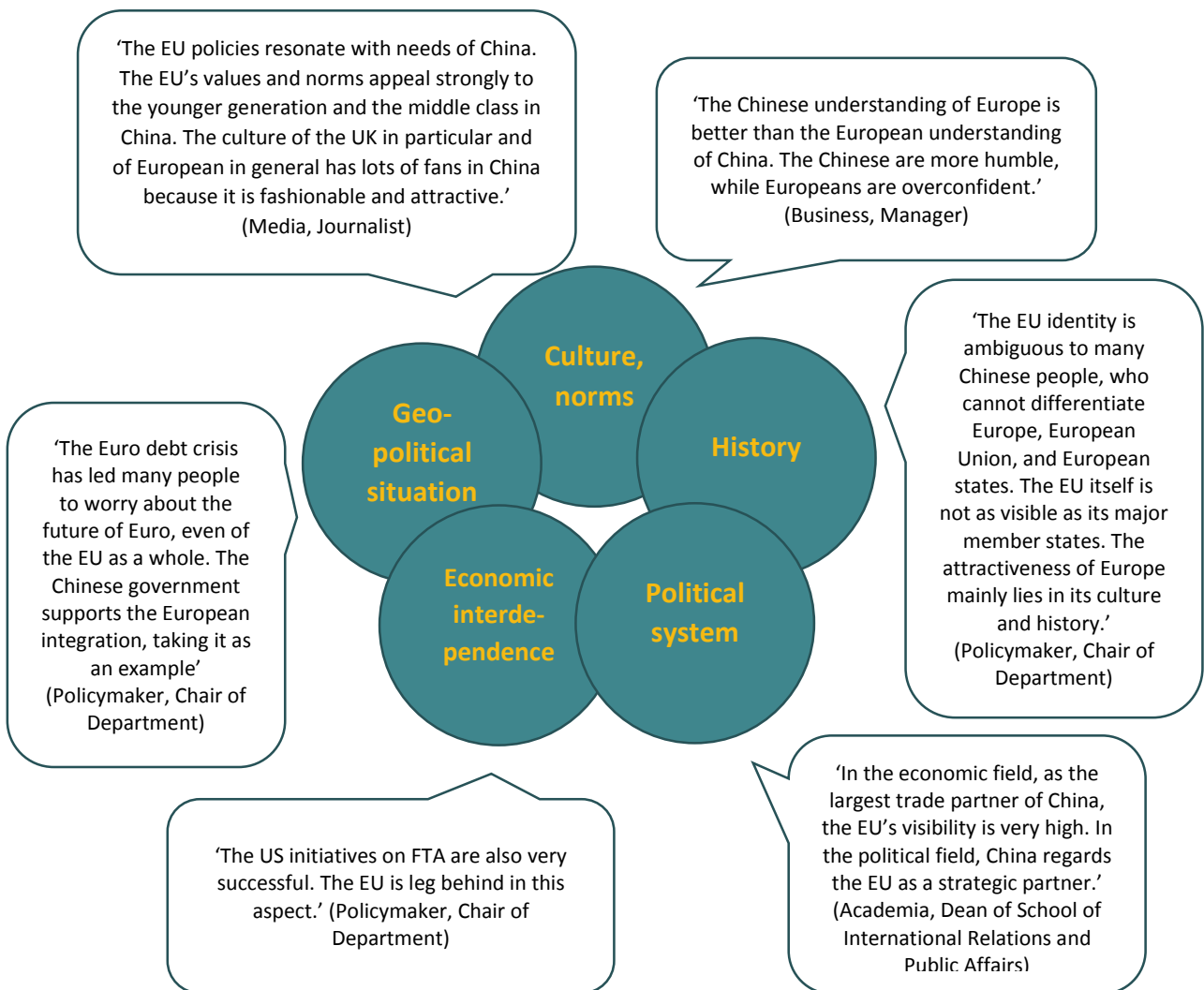
	Awareness of EU	General view of EU	China-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender
Age	Older ↑	...	...	...	Younger ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	...	More informed ↑	More informed ↑	More informed ↑	...	...	More informed ↑
Income	...	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑
Level of education
Working status	...	Employed ↑	Employed ↑	...	...	Employed ↑	...
Region

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1410). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Chinese views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



7 INDIA



Executive Summary

In India awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the World Bank. EU visibility in terms of how frequently people hear about it is somewhat high, as many as 54% of respondents hear about once a week or more often, with 9% saying they never hear about it. The main sources for getting info on the EU are TV, print media and online media (including online versions of print media). Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural affairs, while in Europe coverage social and cultural issues are mentioned more often than politics.

The EU was the most positively viewed global actor when comparing to other international organizations, but less so when compared to countries – it was outranked in this respect by the US, India itself, Russia and Japan. India respondents find the EU to be a somewhat influential, important or attractive international actor in most thematic areas, it was among the top 4 global actors in all except the themes of global economic affairs, environmental protection, and development cooperation, in all of which it is ranked among the top 5 international actors. Most common descriptors for the EU among India respondents were ‘modern’, ‘strong’ and ‘efficient’. As concerns evaluations of the EU in the media, it was largely neutral, and there was a similar proportion of negatively and positively framed coverage in the remainder of the articles. Positive framing in political news was in association to the manner in which EU was able to put together a framework for the Iranian nuclear agreement; renewed EU trade with Havana; and the news on the upcoming EU-India summit which was reported with enthusiasm, whereas negative political coverage emanated largely from the prospect of Brexit, protest against ECB measures and EU-Russia relations, while in economic news negative coverage concerned the Greek debt crisis, EU-India FTA talks and anti-trust cases initiated by the EU.

As concerns desirability and likelihood of EU global leadership, comparing to how India respondents view preselected countries in this respect, the EU appears as both a desirable and likely leader – in terms of desirability it's behind only India itself and in terms of likelihood the EU is behind India, the US and Japan, and ranks similarly to Russia. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for music and sports as well as luxury goods and clothes, and relatively least so for the theatre and cinema as well as food and cuisine. In different areas of social development and education, the EU was seen most positively for education and quality of life and least positively for how it fares in ensuring social justice and solidarity, reducing income inequalities and protecting minorities. In Economy and Research, Science and Technology (RS&T), India respondents see the EU as performing best in development of new technologies and relatively less well in agriculture, the entertainment industry as well as media and publishing. In the area of politics and security, the EU is seen as performing best in supporting regional and international cooperation and relatively least so in dealing with refugees and displaced people.

[\[→ Full Country Chapter: Final Report Chapter 3.4 p.116\]](#)
[\[→ List of potential partners: Final Report Table 25: p.269\]](#)



Context

India became EU's Strategic Partner in 2004. Related key documents: Joint Action Plan (2005, revised in 2008).

FTA negotiations initiated in 2007 and ongoing.

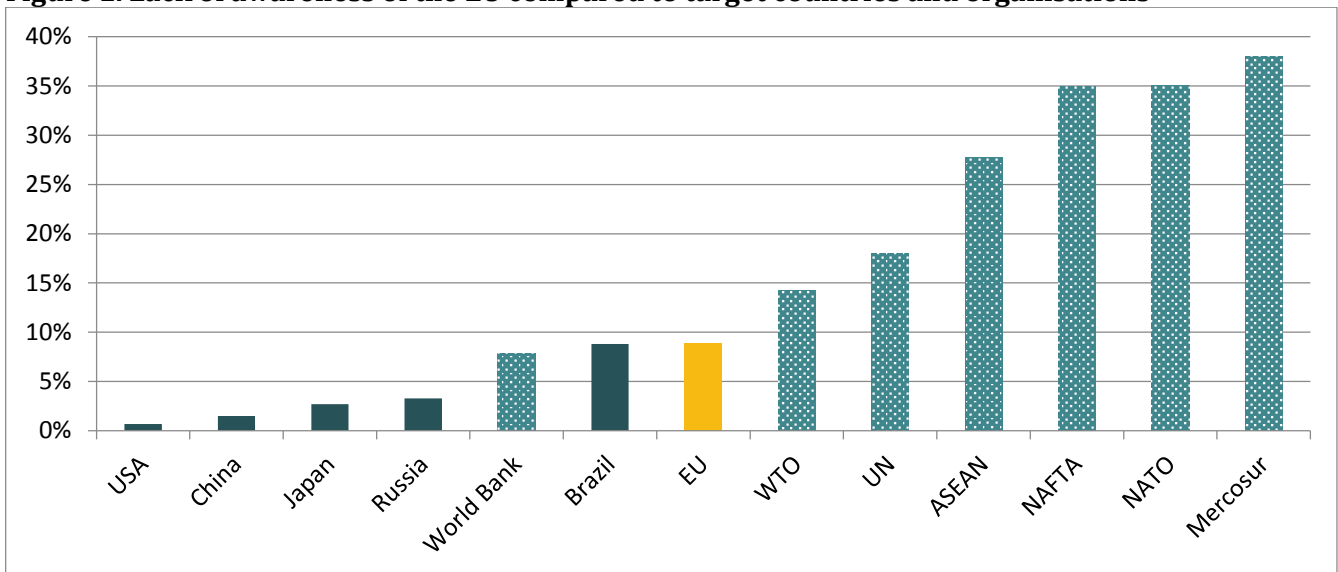
India is a sizable and growing market of more than 1 billion people. Value of EU-India trade: €72.5 bn (2014 data).

Visibility

Awareness of the EU in India – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in India awareness of the EU is below that of the countries used for comparison. The India general public, however, finds the EU more visible than most other international organisations, with the exception of the World Bank.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1056).



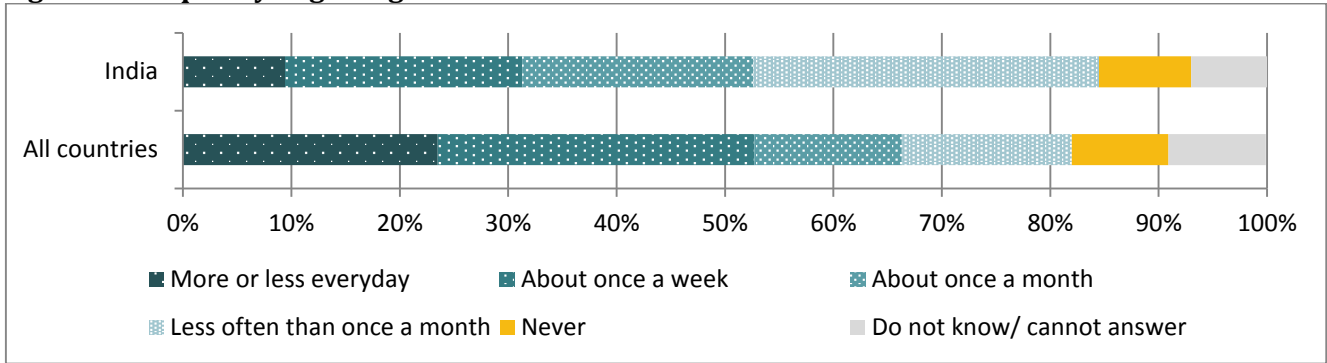
Compared to other countries, awareness of the EU in India (9% unaware/ 91% aware) is moderate and surpasses Canada (15% unaware/ 85% aware), the US and Japan (both 14% unaware/ 86% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in India is moderate. Most India respondents (32%) stated that such information would reach them less often than once a month. The other two largest respondent groups hear or read about the EU approximately once a week (22%) or about once a month (21%). Meanwhile, the two smallest groups of India respondents (both 9%) after those that did not have an opinion, stated that they never hear or read about the EU or do so more or less every day.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1056).



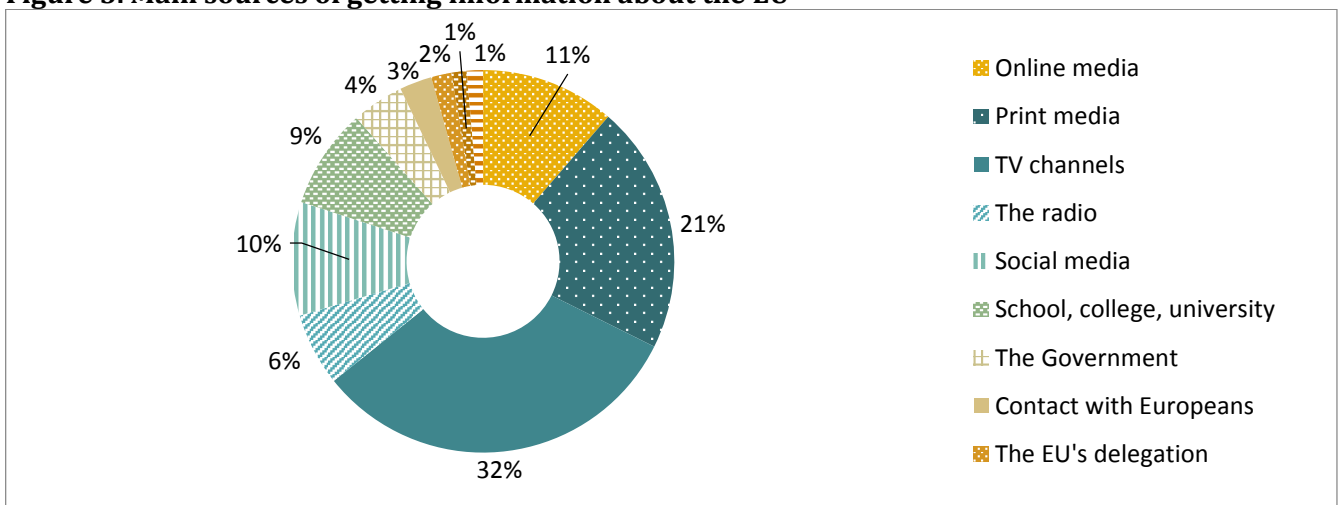
The frequency of hearing or reading about the EU in India, as compared to results in other Strategic Partner countries, is relatively moderate. Though on the one hand the share of Indian respondents who stated that information about the EU would never reach them is not among the highest, on the other hand the share of the ones who hear or read about the EU more or less everyday is one of the lowest, compared to results in other SP countries.

[\[→ comparative overview\]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in India are TV channels (32%), print media (21%) and online media (11%). Meanwhile, social media (10%) in comparison proved a slightly less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 892).



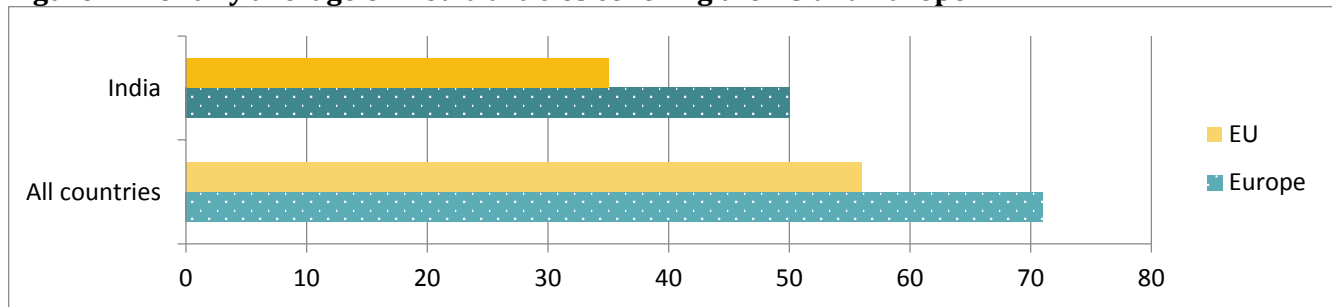
Compared to the other 9 SP countries, India respondents were the only ones that ranked print media in second place, elsewhere it was less popular.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected India popular and business print media outlets mention Europe (monthly average – 50 articles) more frequently than the EU (35).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The Times of India, The Hindu and The Economic Times (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, India is among countries with the least articles covering the EU (surpassing only South Africa). Also, since Europe is mentioned more often in the Indian media, this is in line with the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

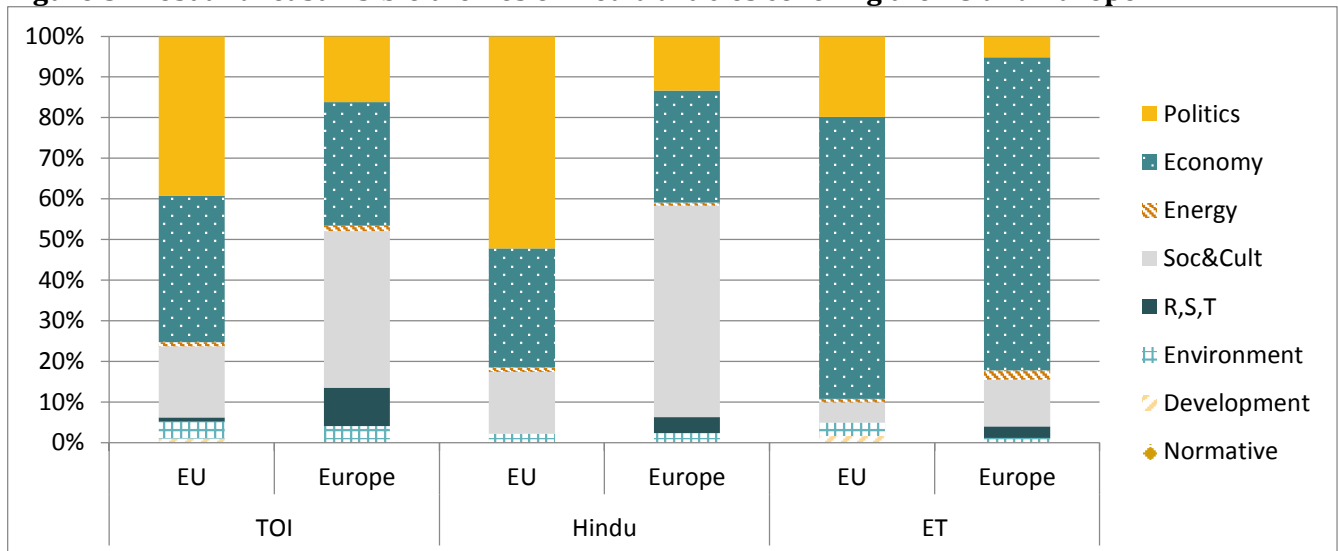
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of India media coverage of the EU concerns the economy (49 articles/month) and politics (37), and, to a lesser extent, social and cultural issues (12), with other topics getting little media coverage (6). In economic news related to the EU, the state of the economy was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on the Iran nuclear deal. Finally, social and cultural news, the third most popular frame in EU-related news in India, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were normative (where the EU is presented as a standard to follow in a specific issue or theme), RS&T, energy and development.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Also other themes (RS&T, partly energy) are covered more often than in articles mentioning the EU.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The Times of India (TOI), The Hindu and The Economic Times (ET) during the period April-June, 2015.



Media analysis results in India show very similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for India respondents the most attractive EU Member States are France, Germany and Italy. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely the UK (related to Brexit), Greece (related to Grexit) and Germany.
- Meanwhile the results concerning institutions show a similar tendency for both the survey and media analysis of the EU dataset, placing the ECB in the first/second place among institutions (practically sharing the first place with the EC in the media analysis by a ratio of 36/37), probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in The Times of India, The Hindu and The Economic Times during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1056).



In this case tendencies in India are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit, Brexit and the state of the economy in the EU during the media monitoring period.

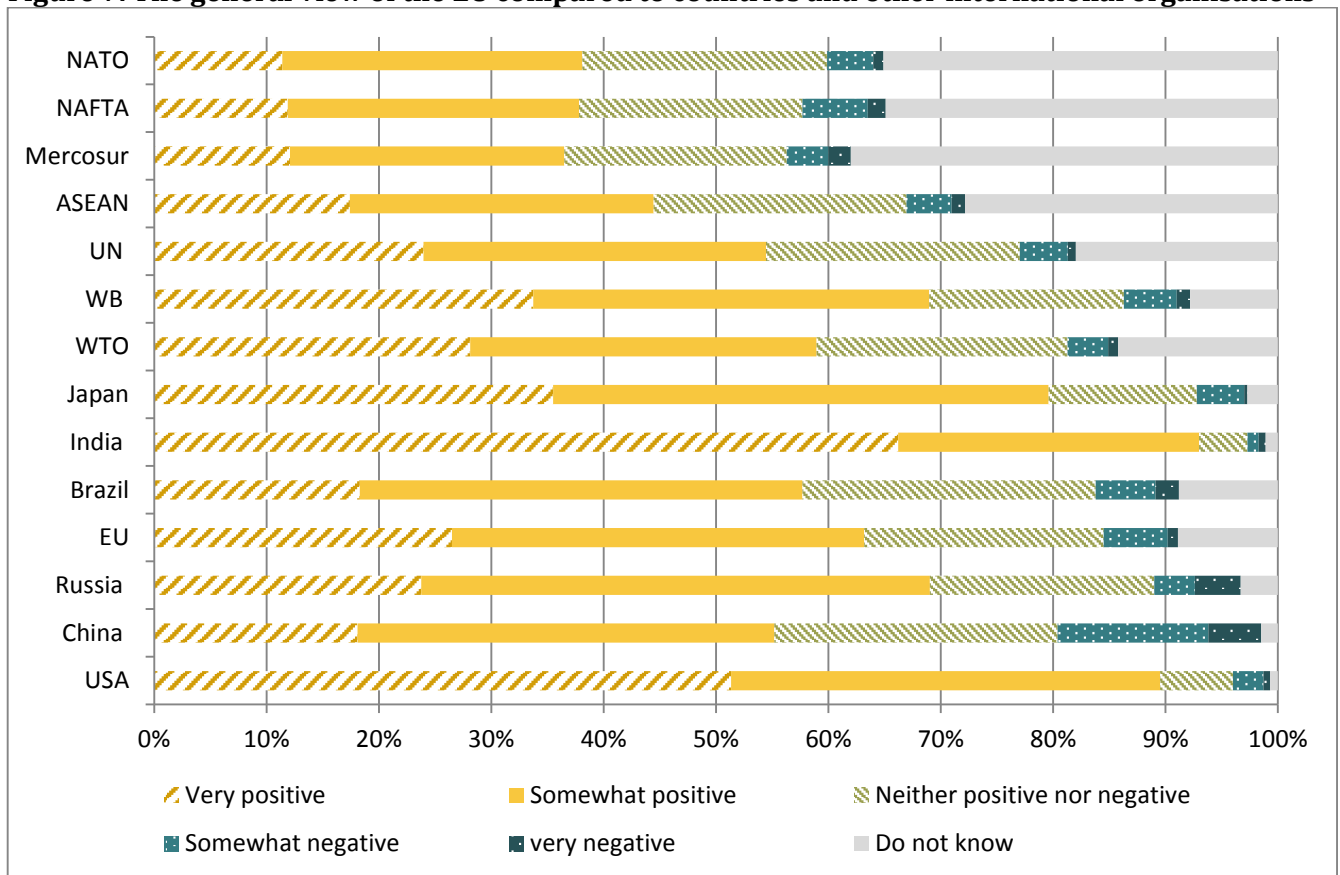
[\[→ comparative overview \]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of the India general population, the EU was the most positively viewed global actor when comparing to other international organizations, but less so when compared to countries – it was outranked in this respect by the US, India itself, Russia and Japan. As concerns organisations, the EU was seen less positively only than the World Bank. A total of 63% of India respondents viewed the EU positively, compared to 7% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1056).



Looking at how the EU is evaluated in India as compared to in the other Strategic Partner countries, India respondents were relatively more positive – together with Mexico India’s evaluations of the EU were the most positive.

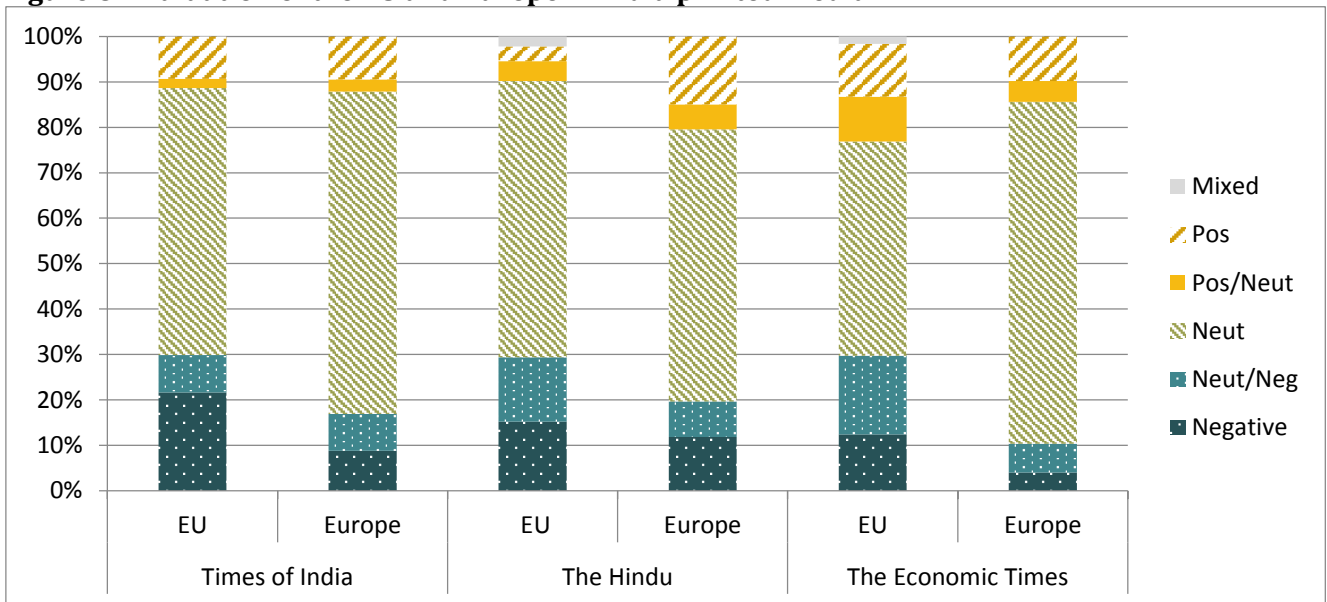
[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, India newspapers present the EU somewhat less positively than negatively, some 14% of EU articles featured positive evaluations versus 30% that evaluated it negatively. Europe coverage, in contrast, was more balanced– 15% of articles in the EU dataset evaluated it positively compared to the same percentage with negative evaluations (Figure 8). EU and Europe coverage in India did not differ considerably, albeit Europe was consistently among the dailies less often evaluated negatively.

In media coverage, positive political news items included reports about the manner in which EU was able to put together a framework for the Iranian nuclear agreement; renewed EU trade with Havana; and the news on the upcoming EU-India summit which was reported with enthusiasm. The negative news in the political frame emanated largely from the prospect of Brexit, protest against ECB measures and EU-Russia relations, while in economic news negative coverage concerned the Greek debt crisis, EU-India FTA talks and anti-trust cases initiated by the EU.

Figure 8. Evaluation of the EU and Europe in India printed media

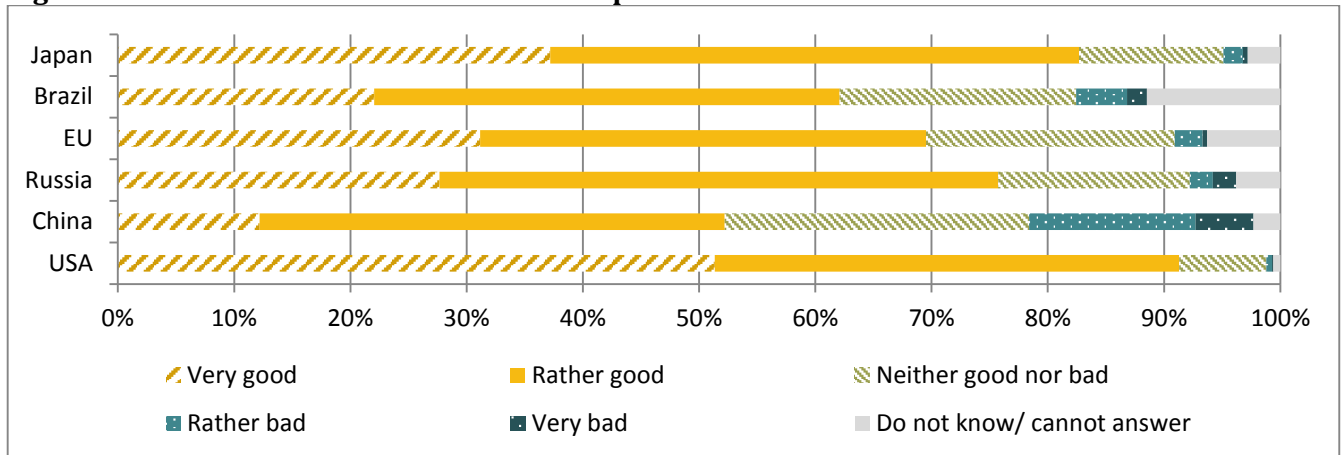


Note: Based on observation of news articles mentioning the EU and Europe in The Times of India, The Hindu and The Economic Times (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU's relationship with India

According to the public opinion poll, the India general population views their country's relationship with the EU to be mostly good, behind that with the US and Japan. Some 70 per cent of respondents view it as good, compared to 3% that view it negatively (Figure 9). India respondents were similarly positive about the EU in general (Figure 7) and the India-EU relationship specifically.

Figure 9. Evaluation of the India's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1056).



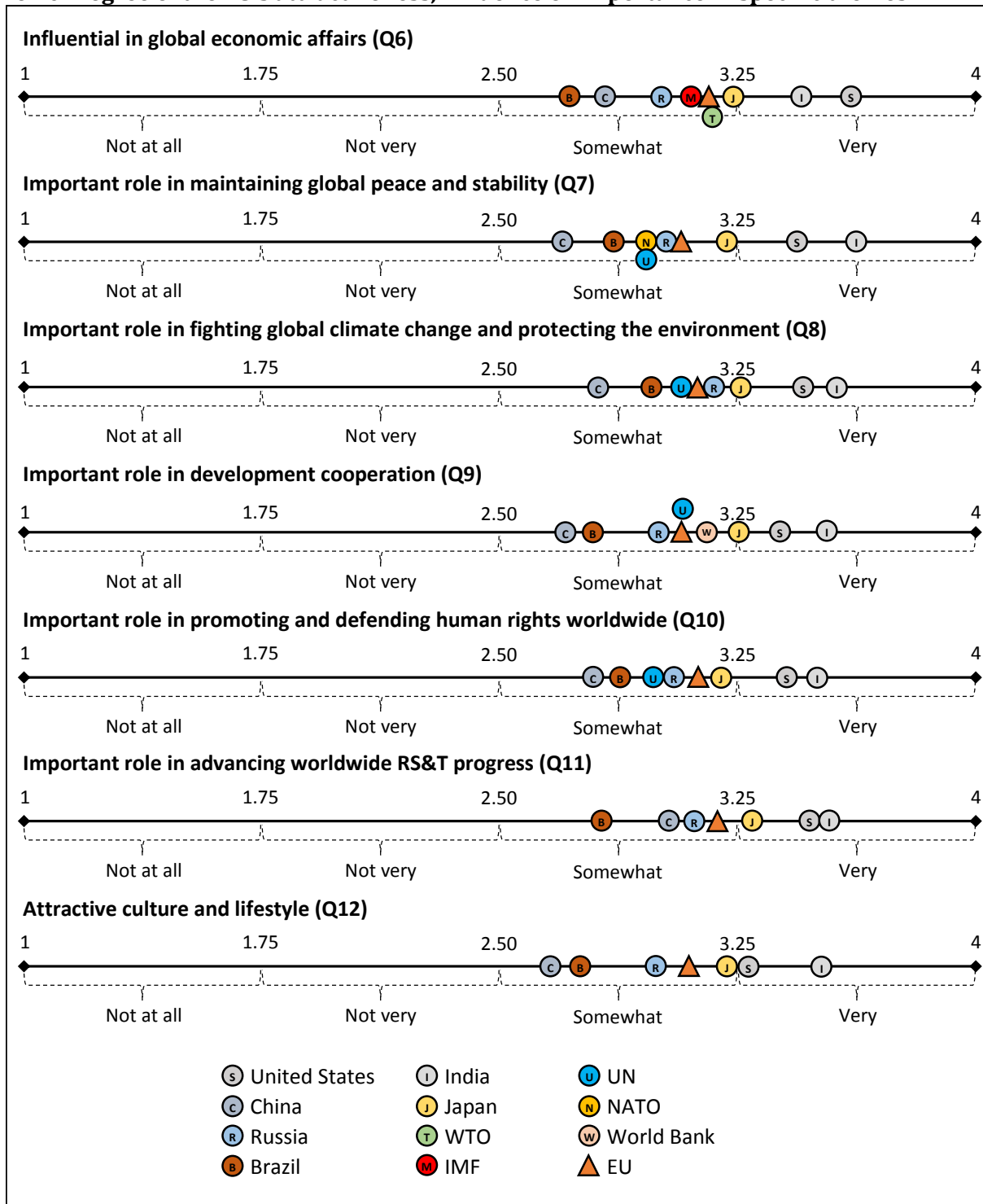
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, India respondents were the most positive of all countries and above the second most positive countries in this respect (Brazil and Canada) by as many as 12%.

[\[→ comparative overview\]](#)

Importance of the EU in selected thematic fields

Overall, the general public in India sees the EU as a somewhat influential, important and attractive international actor in each of the areas listed in Figure 11. Looking comparatively at which areas the EU was seen as more important in over others, none stood out – the EU is seen as similarly important in global economic affairs; maintaining global peace; protecting the environment; development cooperation; defending human rights; advancing worldwide RS&T; and upholding an attractive lifestyle. The EU is among the top 4 most influential, important and attractive international actors in all of the listed thematic areas except global economic affairs, protection of the environment and development cooperation, where it appears among the top 5 actors. The general public in India consistently found the US, Japan and India more important than the EU in each of the covered thematic areas.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1056). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



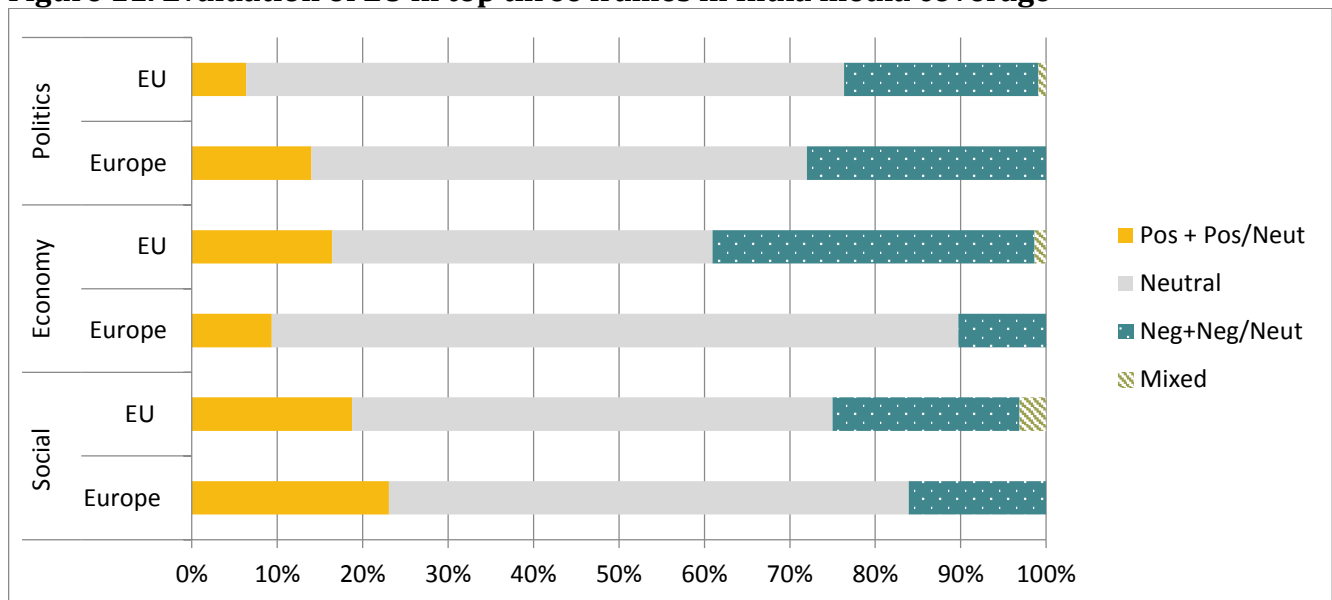
India respondents see the EU as somewhat to very influential across the different themes listed in Figure 10 and similarly to other countries. Where it stands out, is that India general public see the EU as slightly less important in defending human rights.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in India media coverage: politics, economy and social, Europe was evaluated more positively than the EU in politics and social frames, whilst the EU coverage had more positive articles than that of Europe. However, the EU also had more negative coverage, particularly in economy compared to the other two frames, and compared to Europe.

Figure 11. Evaluation of EU in top three frames in India media coverage



Note: Based on observation of news articles mentioning the EU and Europe in The Times of India, The Hindu and The Economic Times (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

Most common descriptors used by general population in association to EU

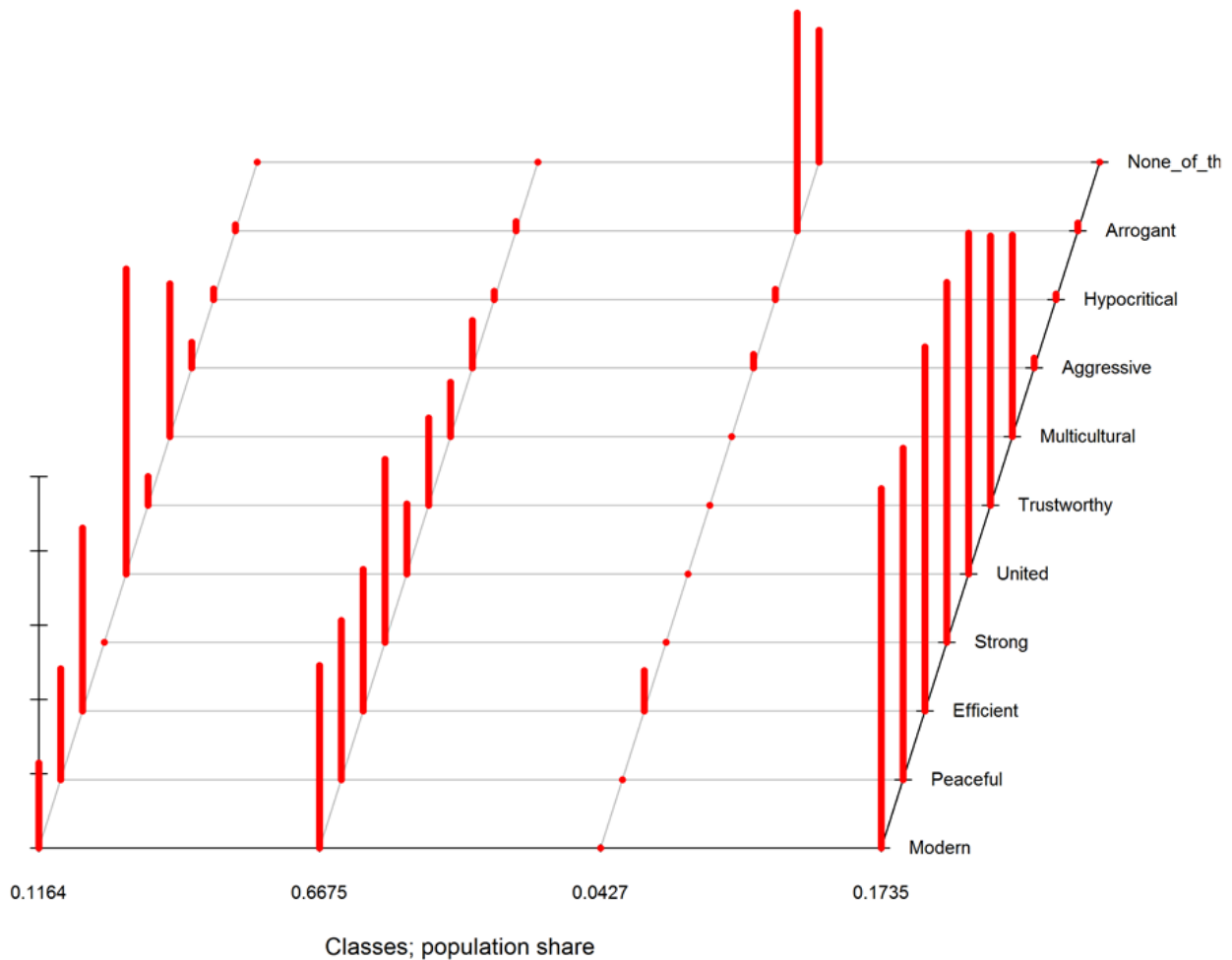
The general population in India chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in India:

- Mostly positive and many descriptors – 17% (top 3: modern, strong, efficient).
- Mixed, mostly negative descriptors and no opinion – 4%.
- Mixed, but mostly positive descriptors – 67%.
- Mixed – key descriptors united and multicultural – 12%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the classes that used mostly positive descriptors (12%, 7% and 17% classes)

compared to that of the class that also used negative descriptors. Where mixed descriptors were used – e.g. the 78% class, it cannot be gauged whether it was used in a positive or negative sense.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1056) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all other 9 SP countries except in Russia, the general population in India chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, India's classes stand out in that the class with more negative descriptors is very small, and moreover only chose the word arrogant, whereas in other countries such classes showed a variation of negative descriptors. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

Effectiveness

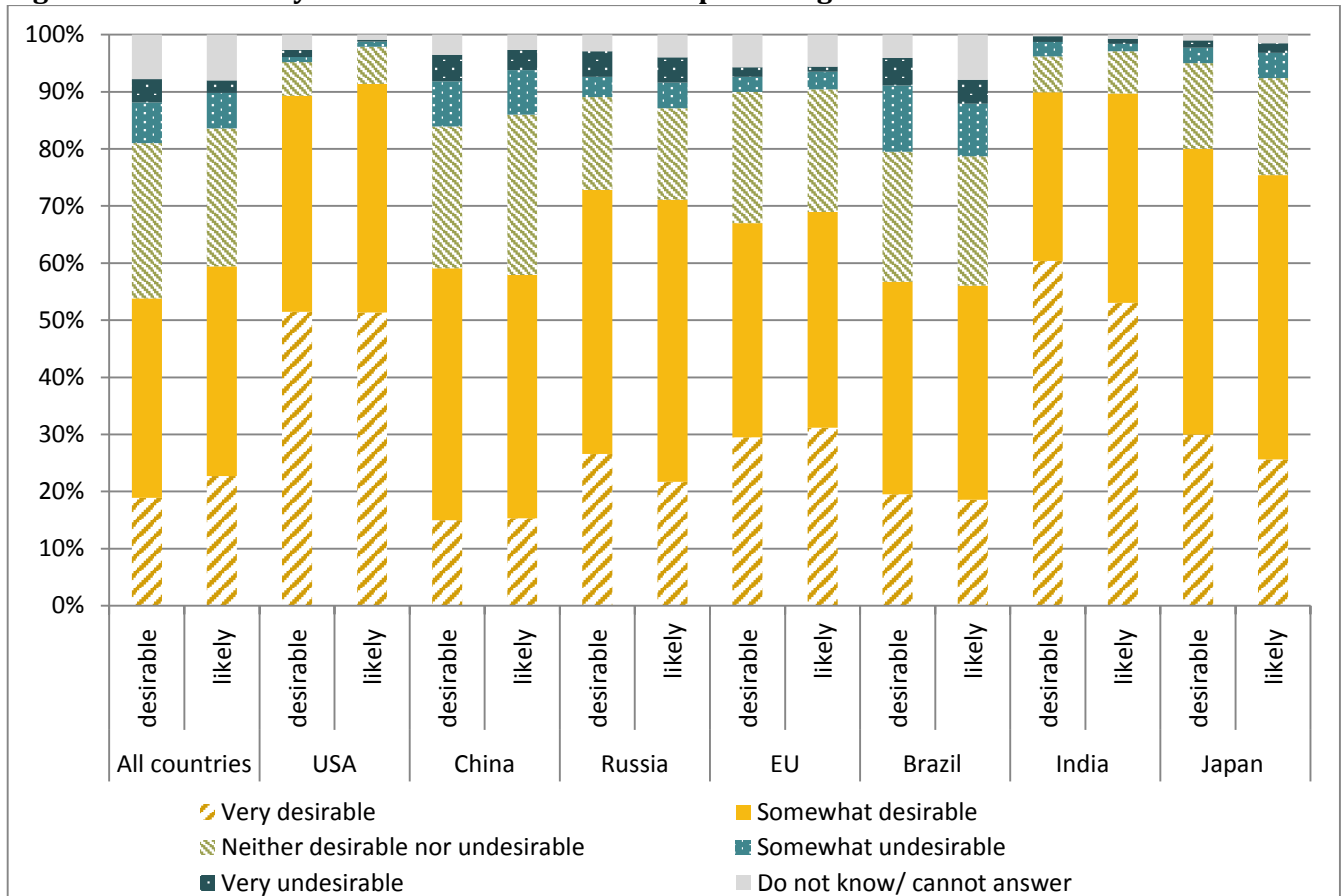
Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade,

research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public in India finds EU global leadership both desirable and likely. Looking at desirability and likelihood of its leadership, the EU falls behind India itself, the US and Japan, ranking similarly to Russia.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



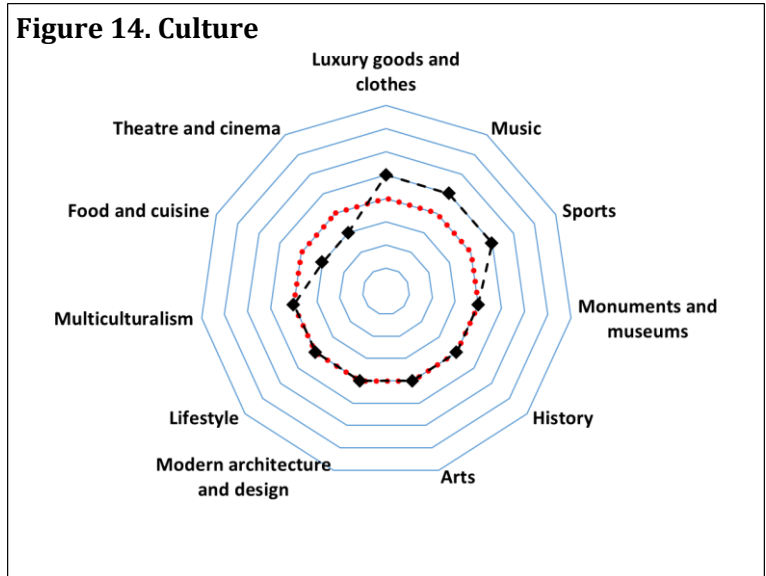
Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1056)



Compared to how desirable and likely the general public in the other SP countries see future EU global leadership, desirability of EU leadership in India is the highest of all the countries, whereas as concerns the likelihood of the EU assuming this role, India is behind only Mexico and South Korea.

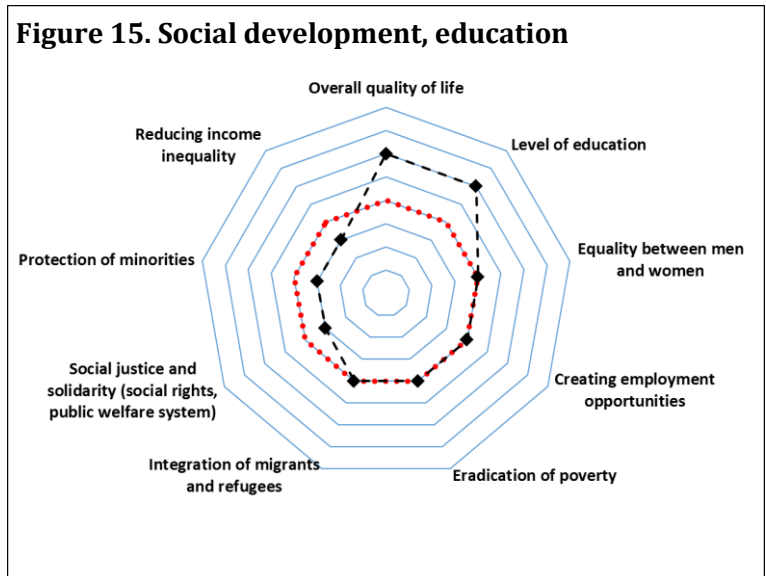
Culture

In the area of culture, the general public in India had the most positive views towards the EU's effectiveness in terms of music and sports, as well as luxury goods and clothes. On the contrary, the theatre and cinema, as well as food and cuisine were less often viewed positively.



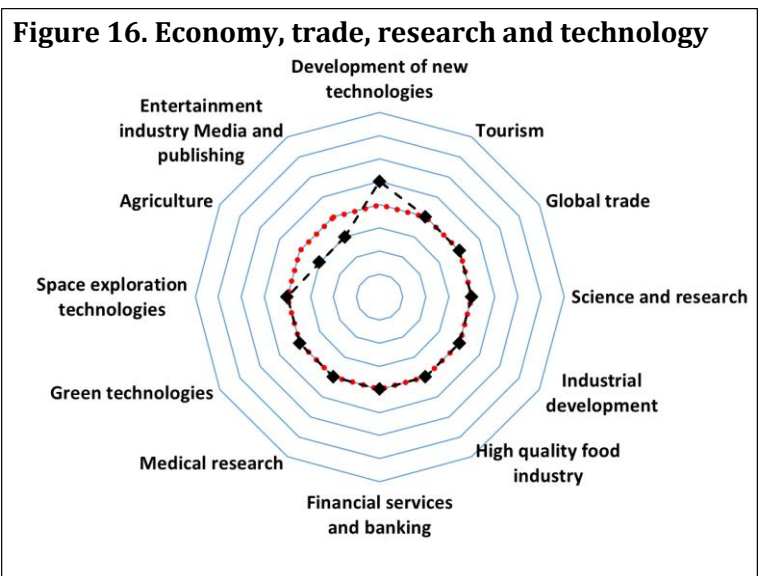
Social development and education

In the area of social development and education, Indian respondents had the most positive views regarding EU's performance in terms of education and quality of life. They expressed least positive views in terms of how it fares in ensuring social justice and solidarity, reducing income inequalities, and protecting minorities.



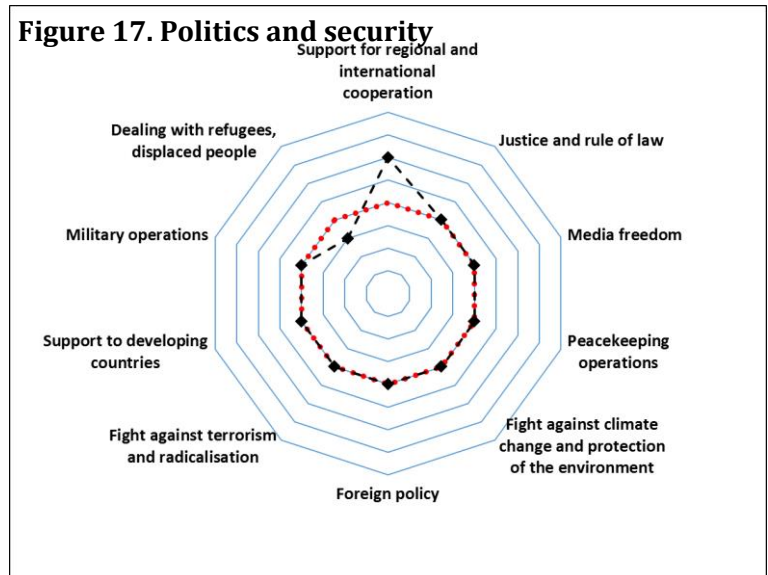
Economy and RS&T

In the area of economy and RS&T, respondents in India were most positive about the EU's performance in development of new technologies and the least positive in the field of agriculture, as well as the entertainment industry, media and publishing.



Politics and security

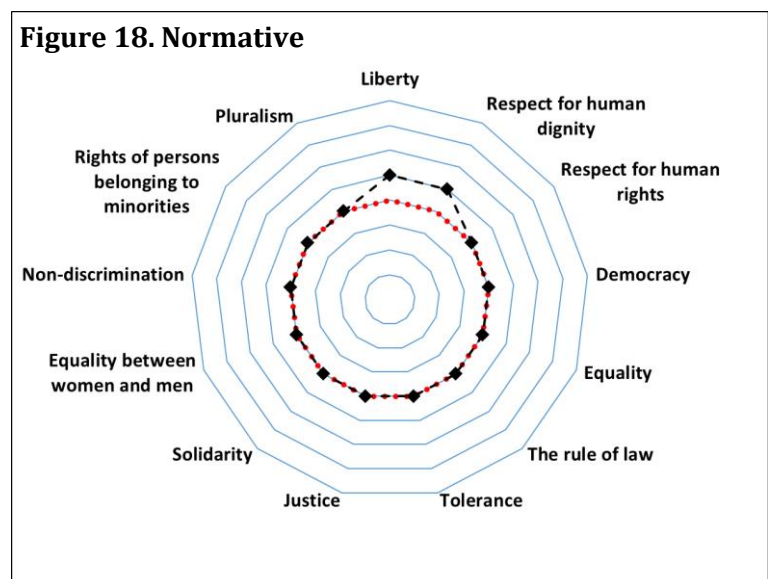
In the area of politics and security, respondents in India were most positive about the EU's performance in supporting regional and international cooperation. They were least positive about the EU's performance in dealing with refugees and displaced people.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1056). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

Across different normative issues, Indian respondents reported that their views are similar to those of the EU on all of the listed issues except liberty and respect for human dignity. As for the latter two, slightly more respondents found similarity in their personal point of view with that of the EU's than in terms of any other normative issue.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1056). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. In terms of **gender**, women were more likely to have a different view of the India-EU relationship and found EU global leadership less likely.

Respondents with higher **income** found the EU to be more attractive, as well as a more desirable and likely global leader. The level of **education** and **working status** did not feature among explanatory criteria in the India sample. Finally, the **region of residence** did account for differences in perceptions in India, respondents from Bangalore were more positive about the EU in general, found it to be a more likely global leader, and more influential among different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). In addition, the region of residence featured as an explanatory variable for two more questions – people in Delhi hear or read about the EU most often compared to other regions, and in Bangalore least often. Moreover, as regards whether people feel they have sufficient information on the EU, the best informed respondents were in Delhi and Chennai, while the least informed were in Kolkata, Bangalore and Mumbai (see the Comparative Public Opinion report for more information on explanatory criteria).

As concerns personal connections to Europe, the extent to which respondents felt they receive **sufficient information** on the EU was a predictor of a better general view of the EU and of the EU-India relationship, and this group of respondents also found the EU a more desirable and likely leader. Contact with Europe, unlike in other countries, did not feature as an explanatory criteria in the India sample.

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	India-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	...	...	Women ↓	...
Age	...	Younger ↑	...	...	...	...	...
Contact with Europe
Sufficiently informed	...	More informed ↑	More informed ↑	...	More informed ↑	More informed ↑	...
Income	Higher income ↑	Higher income ↑	Higher income ↑	...
Level of education
Working status
Region	...	Bangalore ↑	...	...	...	Bangalore ↑	Bangalore ↑

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). (N = 1056). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

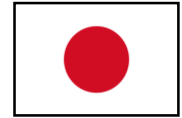
Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Indian views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



8 JAPAN



Executive Summary

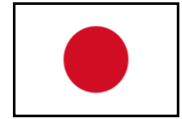
In Japan awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above all other listed international organizations. EU visibility in terms of how frequently people hear or read about the EU is rather low – beside as many as 24% that could not provide an answer, the second highest share of Japanese respondents – 22% said hear of the EU about once a week. A sizeable portion of the population, as many as 15%, said they never hear or read about the EU. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in EU news in print media used for analysis are politics, economy and social and cultural, whereas in Europe coverage social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in Japan. Japanese respondents find the EU among the top 3 most influential, important or attractive international actors in most areas except development cooperation. Most common descriptors for the EU among Japan respondents were ‘multicultural’, ‘modern’ and ‘united’. However, as regards representations of the EU in the media, Japan newspapers evaluated it more positively than negatively, while coverage of Europe was relatively neutral. The frames that had a substantial volume of articles (‘politics’ and ‘economy’; dominant sub-frames: respectively Brexit/ Ukraine and EU Russia sanctions; the state of the economy) were predominantly neutral. The social and cultural frame manifested a somewhat polarised tone of both positive and negative reporting. The ‘development’, ‘environment’, ‘normative’ (dominant sub-frame: environment issues) and ‘energy’ frames all had over half of their news stories written positively.

As concerns desirability and likelihood of EU global leadership, the Japan public ranks the EU behind the US and Japan itself; meanwhile regarding the likelihood of it assuming this role, the EU appears behind only the US. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields in culture, the EU is best regarded for its arts, and relatively least so for multiculturalism, lifestyle and food and cuisine. In different areas linked to social development and education, the EU is seen best for education and gender equality and relatively least so for reducing income inequality, eradication of poverty and protection of minorities. In economy and Research, Science and Technology (RS&T), the EU is best regarded for tourism and least so for space exploration technologies. As regards politics and security, Japan respondents see EU’s performance similarly in all listed subfields.

[\[→ Full Country Chapter: Final Report Chapter 3.5 p.136\]](#)
[\[→ List of potential partners: Final Report Table 26: p.271\]](#)

JAPAN



Context

EU-Japan Strategic Partnership Agreement negotiations launched in 2013. Other key documents: The Hague Declaration: (1991).

FTA agreement negotiations launched in 2013.

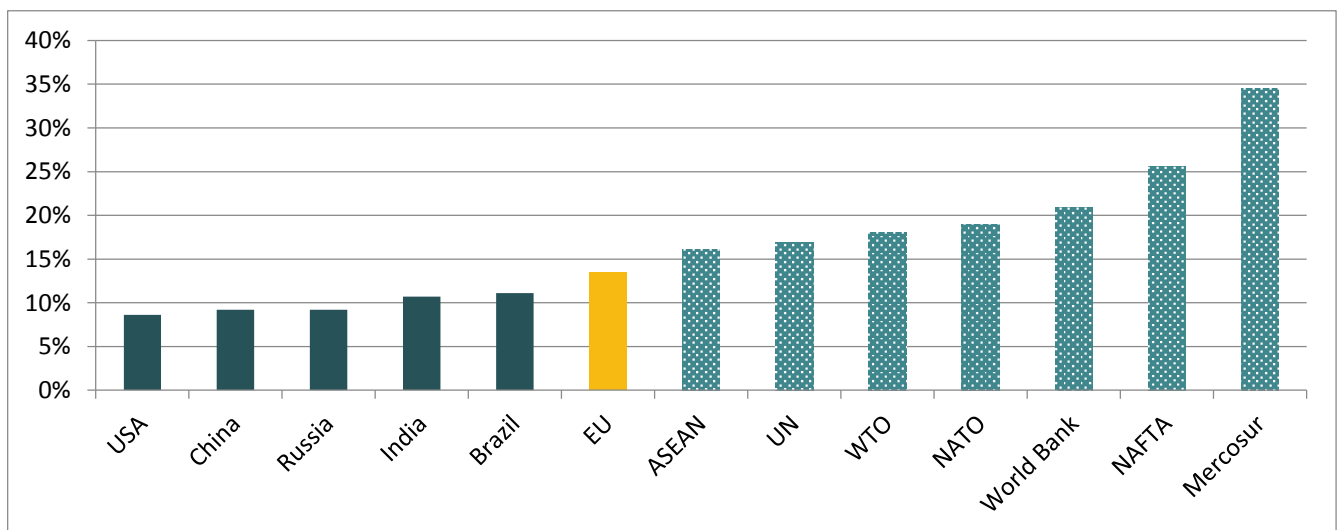
EU and Japan account for more than a third of the world's GDP. EU exports to Japan in goods: €53.3 bn, EU imports in goods: €54.6 bn (2014 data).

Visibility

Awareness of the EU in Japan – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in Japan, awareness of the EU is below that of all countries used for comparison. Japan's general public, however, finds the EU more visible than all other international organisations.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1024).



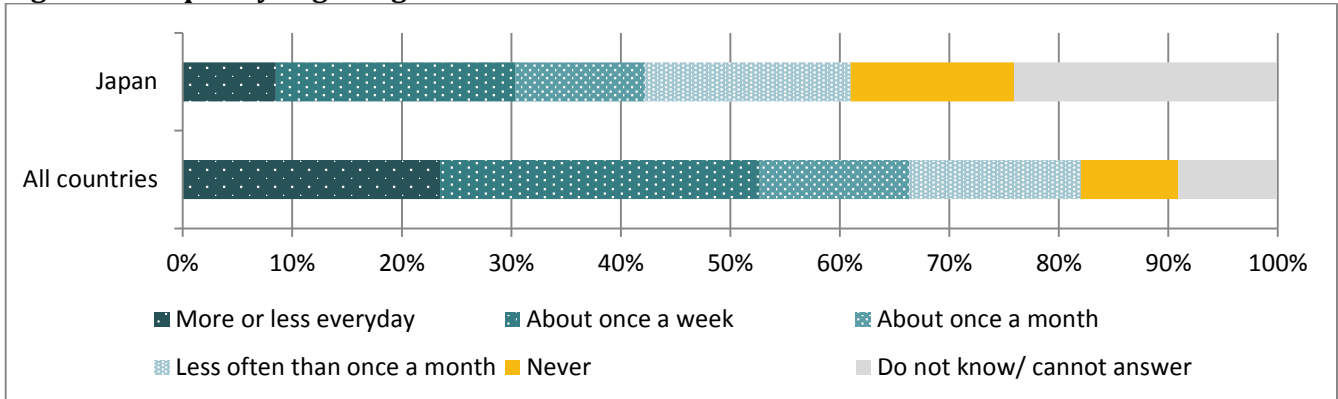
Compared to other countries, awareness of the EU in Japan (14% unaware/86% aware) is the lowest together with the ones of the US (14% unaware/ 86% aware) and Canada (15% unaware/ 85% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in Japan is relatively low. Not including respondents who did not know or could not provide an answer (24%), most Japanese respondents (22%) stated that such information reaches them about once a week. The other two largest respondent groups hear or read about the EU less often than once a month (19%) or never (15%). Meanwhile, the smallest group of Japan respondents (9%) stated that they hear or read about the EU more or less every day.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1024).



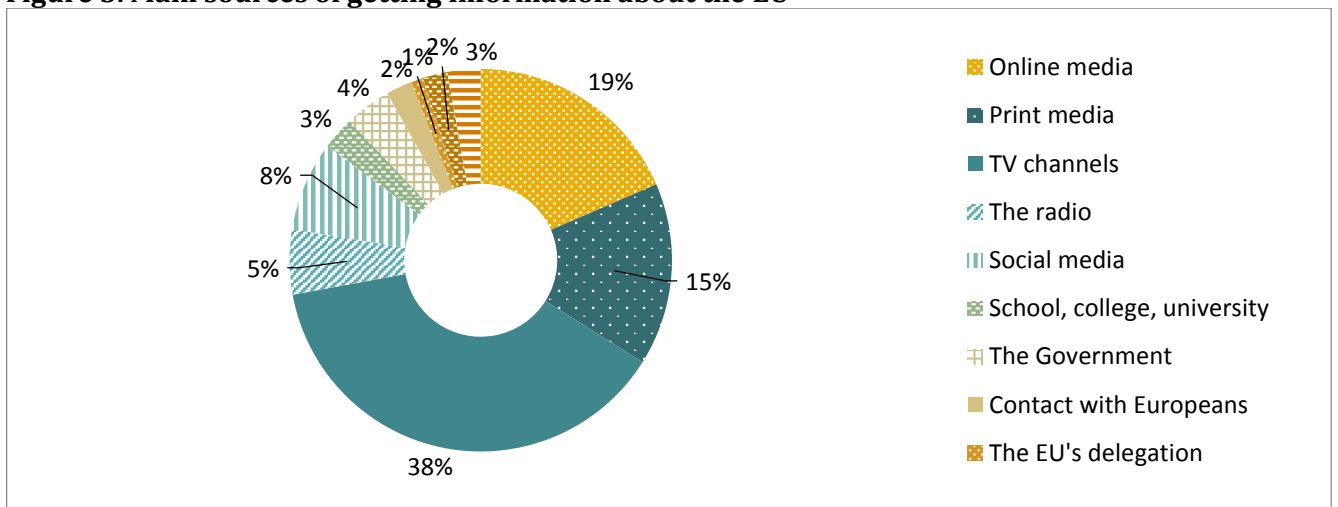
The frequency of hearing or reading about the EU in Japan, as compared to results in other Strategic Partner countries, is relatively low. The share of Japanese respondents who stated that information about the EU would reach them more or less every day is the lowest compared to results in other SP countries.

[\[→ comparative overview \]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in Japan are TV channels (38%), online media (19%) and print media (15%). Meanwhile, social media (8%) in comparison proved a less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 633).



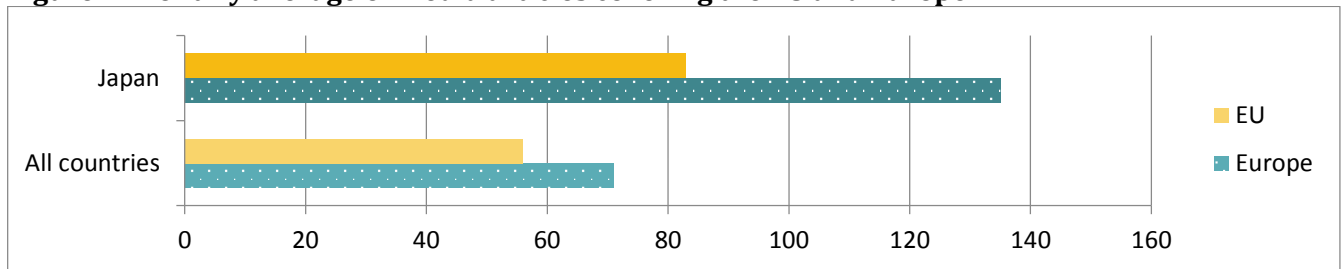
Compared to the other 9 SP countries, Japan respondents marked the same sequence of most popular media sources (TV channels, online media and print media) as those in the US, Canada, and South Korea.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected Japan popular and business print media outlets mention Europe (monthly average – 135 articles) more frequently than the EU (83).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in the Yomiuri Shimbun, Asahi Shimbun and Nihon Keizai (Nikkei) Shimbun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, Japan is the country with the most articles covering both the EU and Europe. Also, since more articles in Japan were related to Europe, it coincides with the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

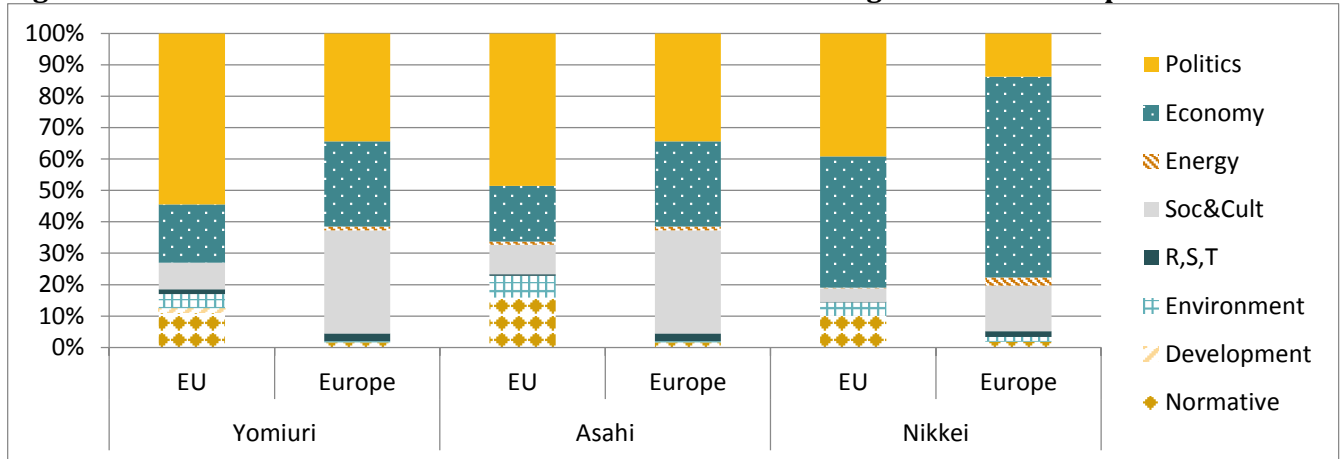
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of Japan media coverage of the EU concerns politics (127 articles/month) and the economy (87), and, to a lesser extent, normative (33) and social and cultural issues (18), with other topics getting little media coverage (18). In political news coverage concerning the EU, the main internal EU issue was Grexit, while most news concerning external EU politics focused on Ukraine and EU Russia sanctions. In economic news related to the EU, the state of the economy was the dominant subtheme. Finally, normative news, the third most popular frame in EU-related news in Japan, was mostly focused on environment issues. The topics that appeared least often in news mentioning the EU were development, energy and RS&T.

Concerning the proportion of the most visible themes in the Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Looking at other topics, RS&T and energy are mentioned more often than in articles mentioning the EU. This partly coincides with the results of the survey: in Japan, respondents associated areas as economy and politics first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in the Yomiuri Shimbun, Asahi Shimbun and Nihon Keizai (Nikkei) Shimbun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



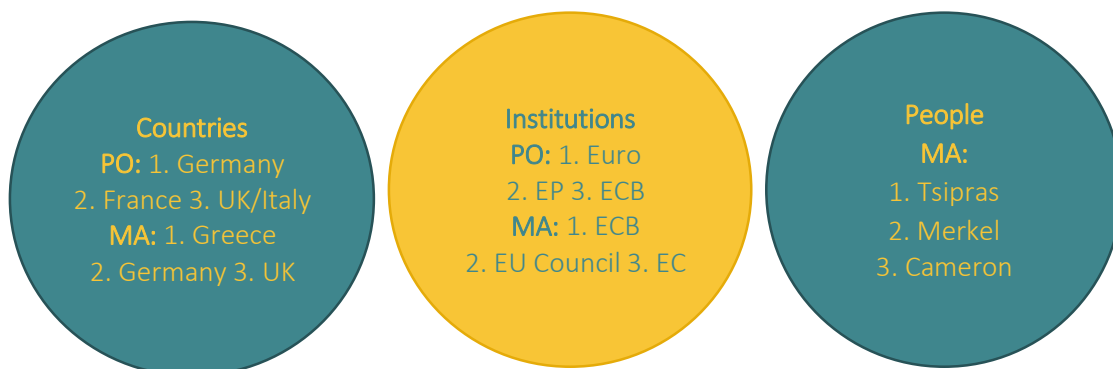
Though media analysis results in Japan show very similar tendencies in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering), only in Japan, the US and Mexico politics is a more visible frame than economy.

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for Japan respondents the most attractive EU Member States are Germany, France, the UK and Italy. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and the UK.
- The results concerning institutions also show similar tendency. While the survey revealed the ECB as the second most recognisable institution, media analysis results for the EU dataset show ECB in the first place, most likely in relation to its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to the dominant sub-frame – the EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in the Yomiuri Shimbun, Asahi Shimbun and Nihon Keizai (Nikkei) Shimbun during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1024).



In this case tendencies in Japan are similar to those of the other Strategic Partner countries – the dominant actors being linked to Brexit and the state of the economy in the EU during the media monitoring period.

[\[→ comparative overview \]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of the Japanese general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only Japan itself and the US, and in the case of the latter – it outranked all other organizations. A total of 27% of Japanese respondents viewed the EU positively, compared to 7% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1024).



Looking at how the EU is evaluated in Japan as compared to in the other Strategic Partner countries, Japan respondents evaluated the EU more neutrally than in other countries, and only 34% of respondents expressed positive or negative news, with the rest opting for neutral. The extent of negative evaluations in Japan was similar to the 10-country average.

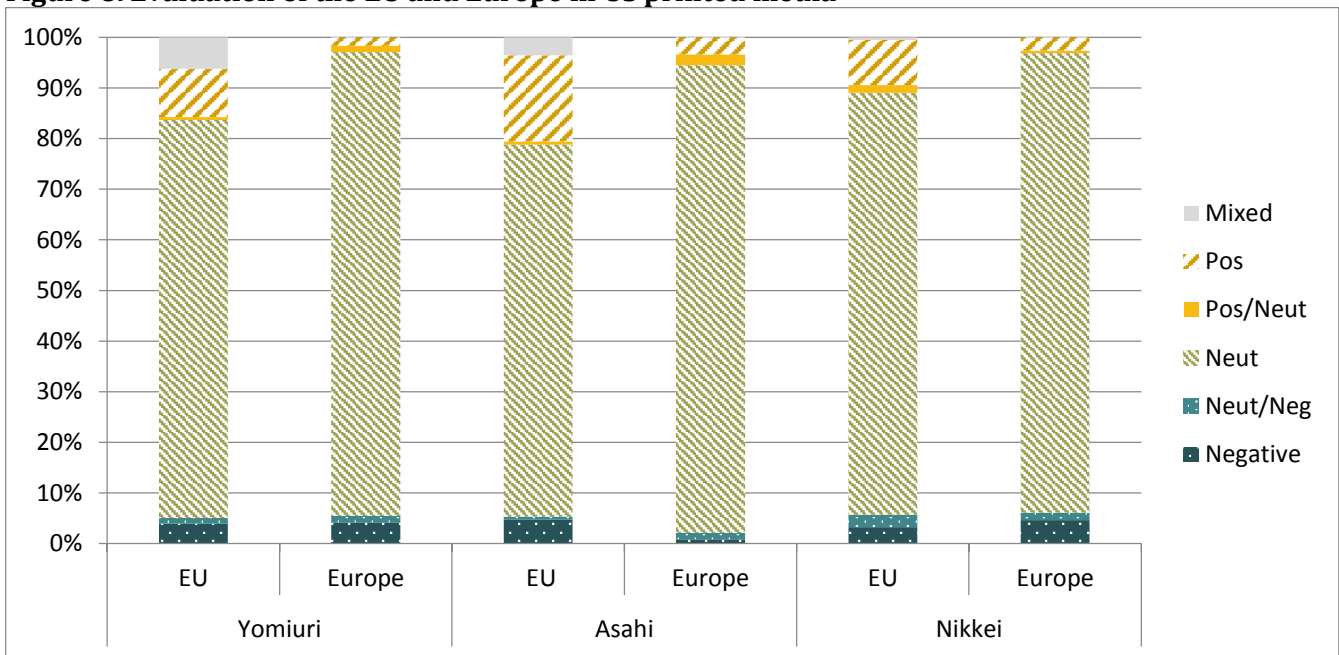
[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Japanese newspapers evaluated it slightly more positively than negatively – some 12% of articles had the EU framed positively as opposed to 5% where it was framed negatively, however the absolute majority of EU coverage was neutral (Figure 8). Europe coverage was even more neutral, with less positive coverage than in the case of the EU. The EU received most positive coverage in the Asahi popular daily.

The frames that had a substantial volume of articles (‘politics’ and ‘economy’) were predominantly neutral. The social and cultural frame manifested a somewhat polarised tone of both positive and negative reporting. The ‘development’, ‘environment’, ‘normative’ and ‘energy’ frames all had over half of their news stories written positively.

Figure 8. Evaluation of the EU and Europe in US printed media

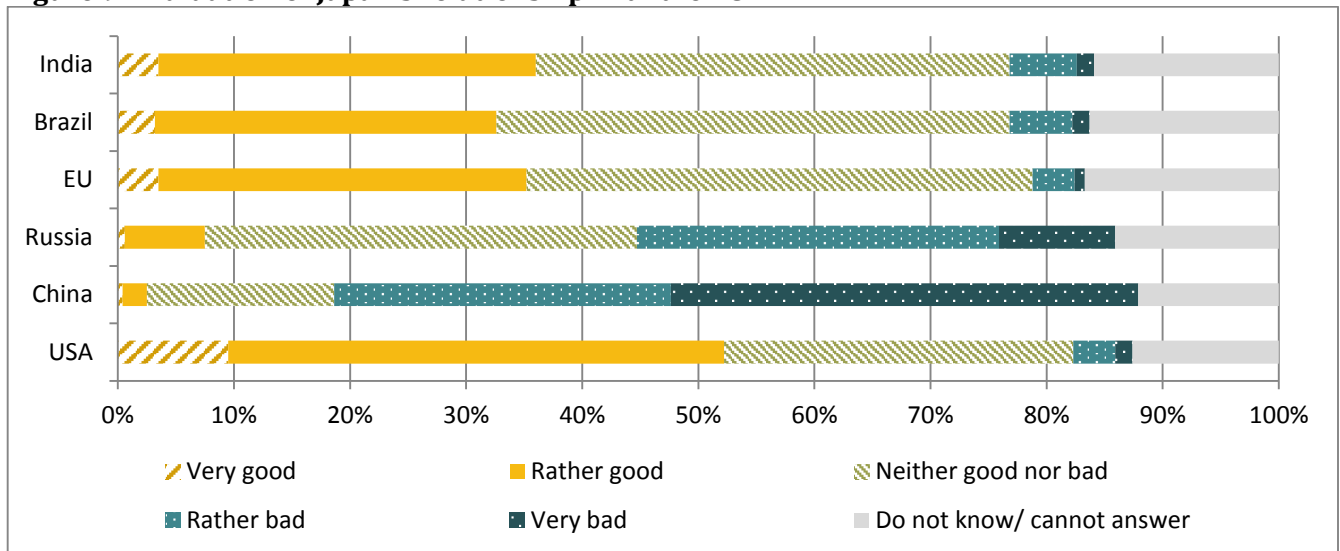


Note: Based on observation of news articles mentioning the EU and Europe in the Yomiuri Shimbun, Asahi Shimbun and Nihon Keizai (Nikkei) Shimbun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with Japan

According to the public opinion poll, the Japanese general population views their country’s relationship with the EU to be mostly good, behind that with the US, and, to a lesser extent, India. Some 35% of respondents view it as good, compared to 5% that view it negatively (Figure 9). Japanese respondents were similarly positive about the EU in general and Japan-EU relations specifically.

Figure 9. Evaluation of Japan's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1024).



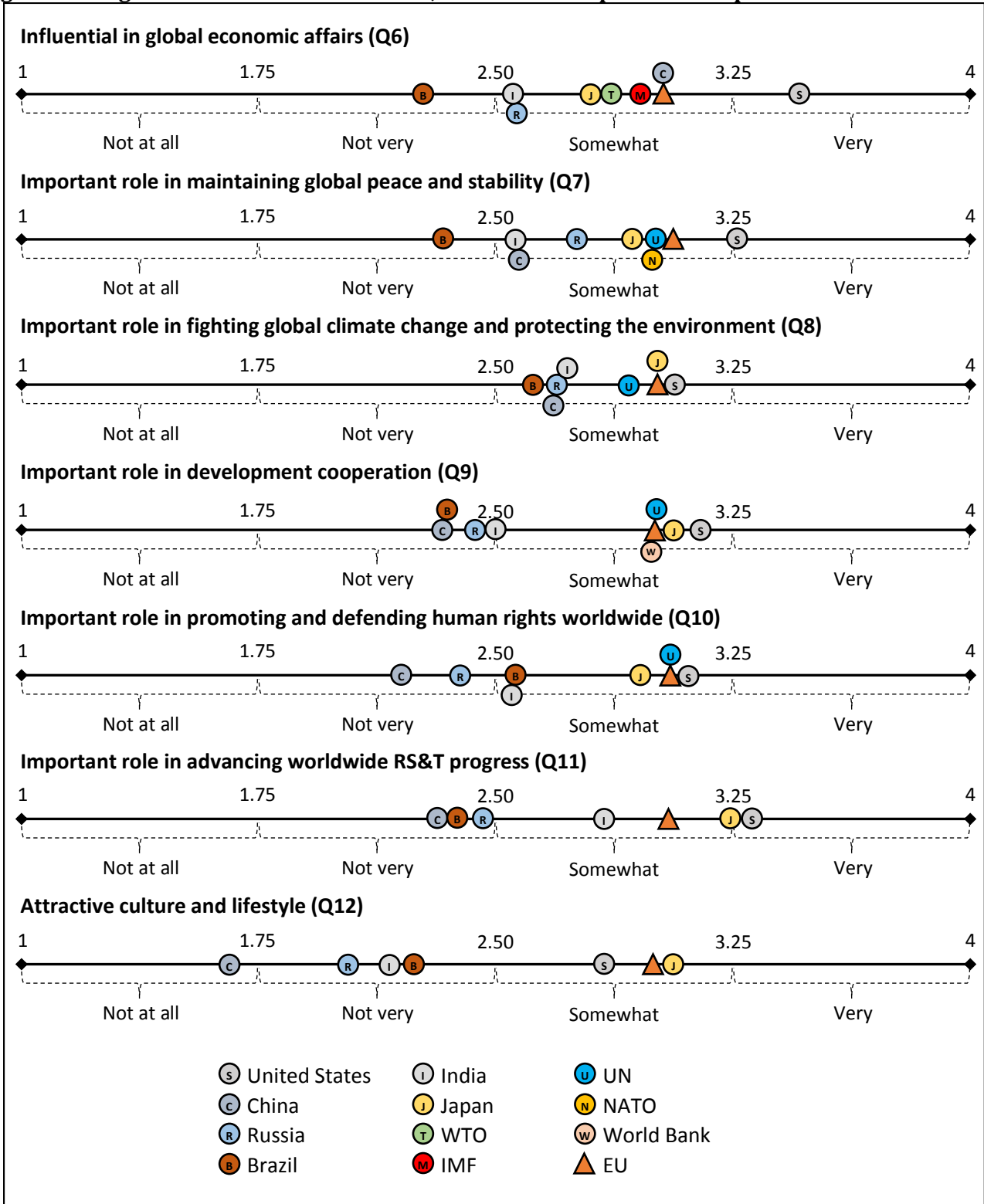
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, Japan stands out in that it has a much higher proportion of respondents that evaluated it in neutral terms, thus expressing less positive and negative views.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in Japan sees the EU as a somewhat influential, important and attractive international actor in each of the areas listed in Figure 10. Looking comparatively at which areas the EU was seen as more important in over others, none stood out – the EU is seen as similarly important in global economic affairs; maintaining global peace; protecting the environment; development cooperation; defending human rights; advancing worldwide RS&T; and upholding an attractive lifestyle. The EU is among the top 3 most influential, important and attractive international actors in most of the selected thematic areas except development cooperation. The Japanese general public found the role of Japan and the US as more important in development cooperation than that of the EU. In addition, they also found the role of the UN, the EU and the World Bank equally important in this regard.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1024). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



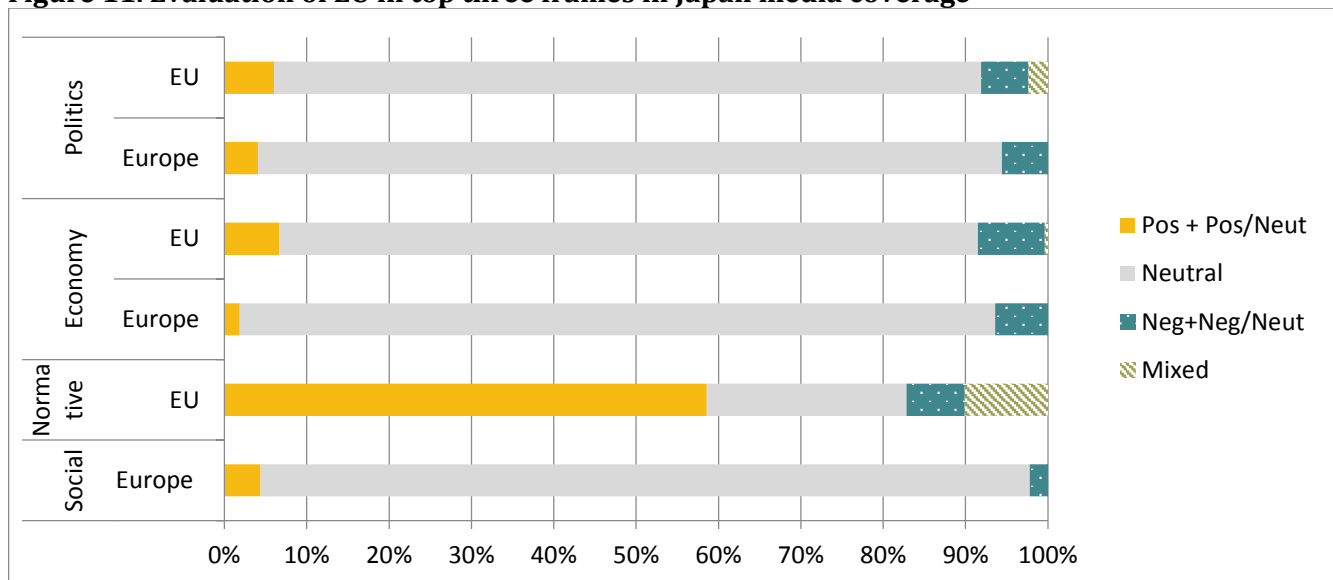
Looking comparatively at how influential SP country populations find the EU across the thematic fields in Figure 10, the Japanese population find the EU less influential across all the themes compared to the 10-country average, albeit more influential than according to the general population of Russia.

[→ comparative overview]

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in Japan media coverage: economy, politics and normative (EU) and social (Europe), Europe was consistently evaluated more neutrally than the EU. Both EU and Europe coverage was balanced in terms of positive and negative evaluations, and were both mostly presented neutrally, except for the EU in the normative theme, where it was evaluated overwhelmingly more positive than in other themes.

Figure 11. Evaluation of EU in top three frames in Japan media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the Yomiuri Shimbun, Asahi Shimbun and Nihon Keizai (Nikkei) Shimbun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

Most common descriptors used by general population in association to EU

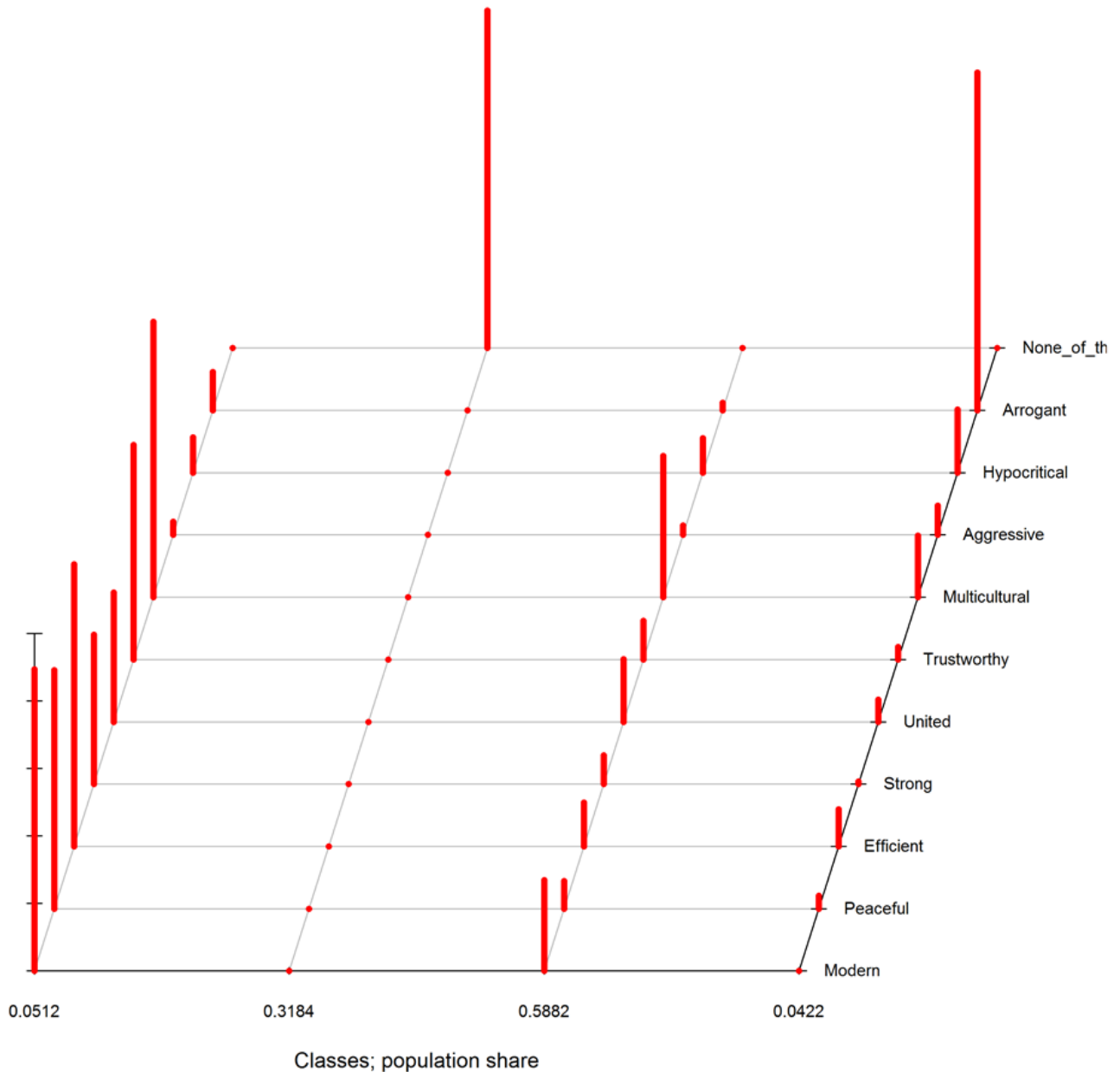
The general population in Japan chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in Japan:

- Mixed, but mostly positive, few descriptors – 60% (top 3: multicultural, modern, united).
- Mixed, but mostly positive and many descriptors – 5%.
- Mixed, but mostly negative – 4% (top 3: arrogant, hypocritical, multicultural).
- No opinion on the EU and its descriptors – 32%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in

Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the 6% class (second from the right) and 4% class (last to the right), which mostly chose negative descriptors.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1024) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all 10 SP countries except in Russia, the general population in Japan chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, a relatively bigger group of Japanese respondents didn't have an opinion to express, and this was true across many evaluative questions in the study, where the Japanese population was more neutral. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview\]](#)

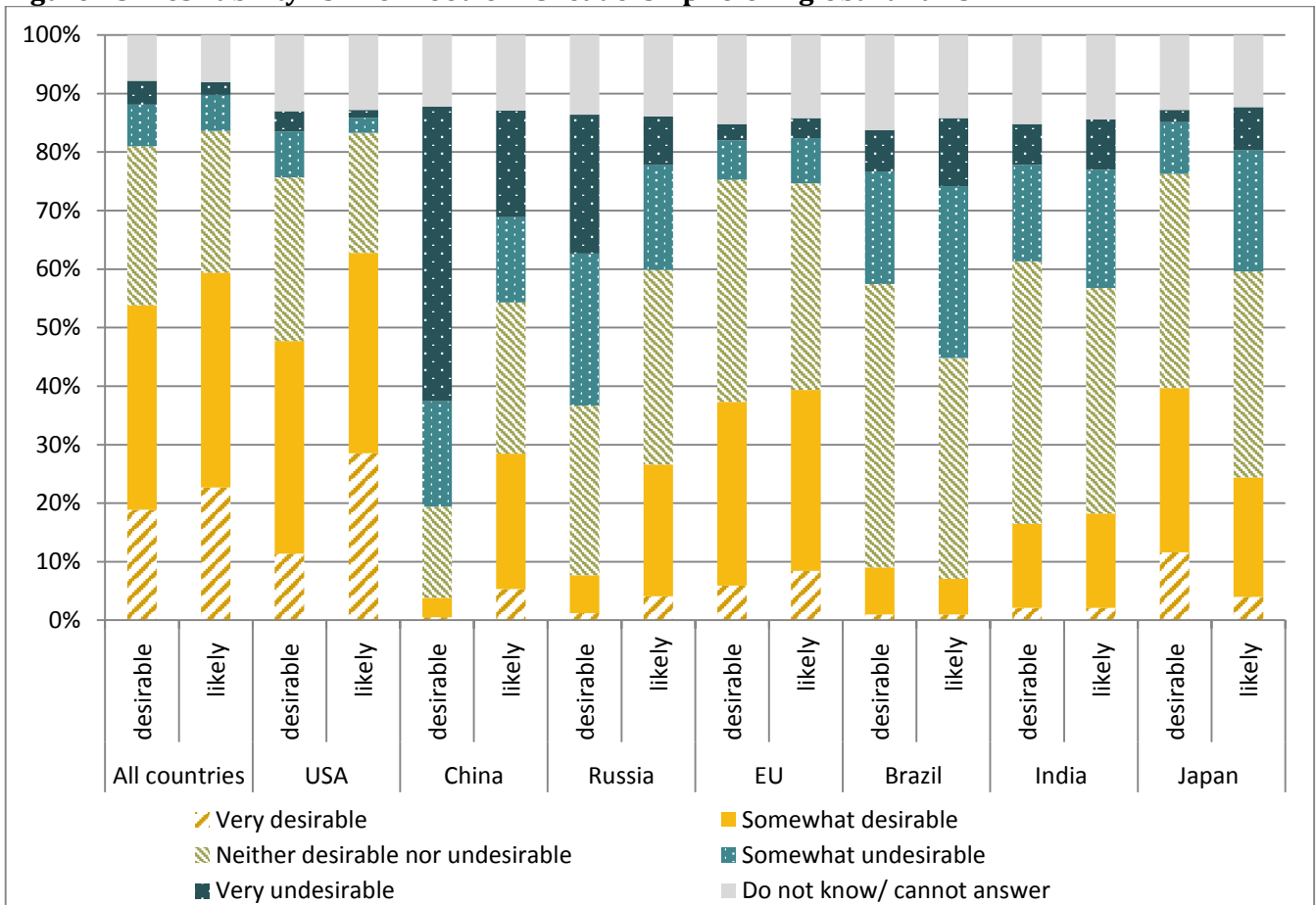
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public in Japan finds EU global leadership both desirable and, slightly more, likely. Looking at desirability of its leadership, the EU falls behind the US and Japan itself, meanwhile regarding the likelihood of it assuming this role, EU appears after the US.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1024)

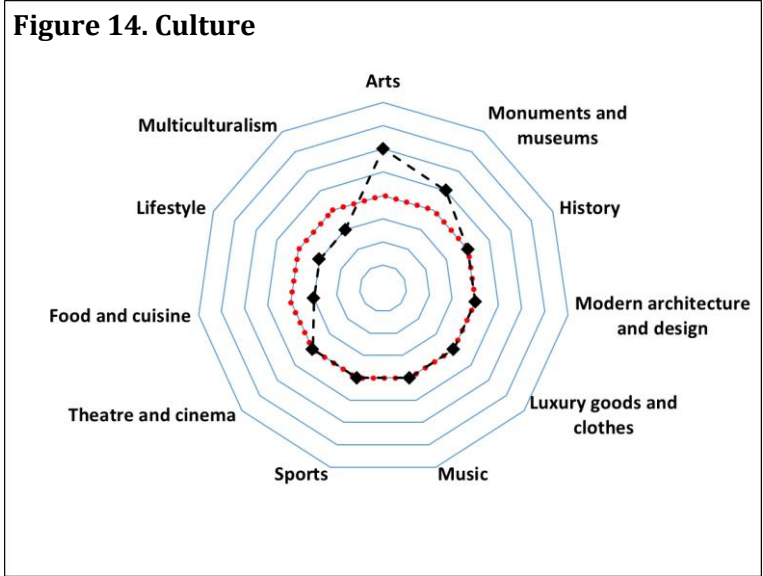


Looking comparatively at how desirable versus likely SP country populations find EU future leadership, in Japan and the US the EU is seen as least likely to become a global leader, and all seen as less desirable, though more so than in Russia.

[\[→ comparative overview \]](#)

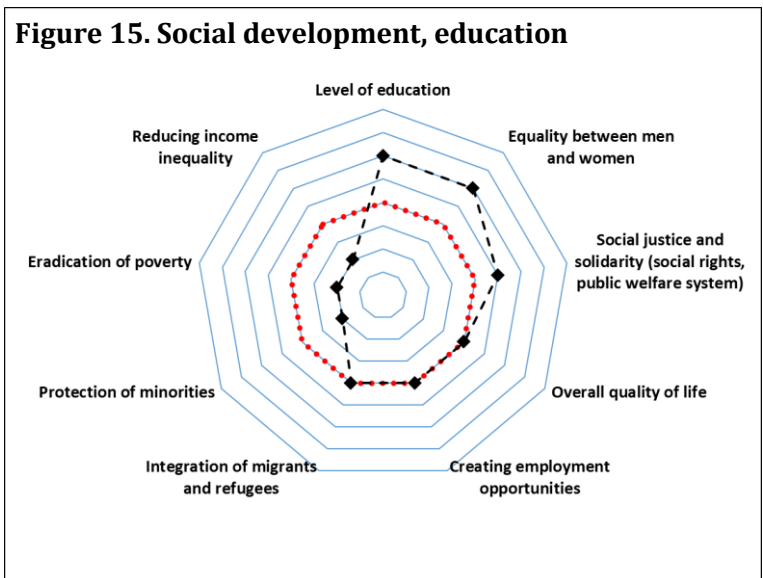
Culture

In the area of culture, the general public in Japan had the most positive views towards the EU's effectiveness in terms of the arts. On the contrary, food and cuisine, as well as lifestyle and multiculturalism were least often viewed positively. Across the remaining fields, the Japanese were relatively more positive about EU's effectiveness in terms of monuments and museums.



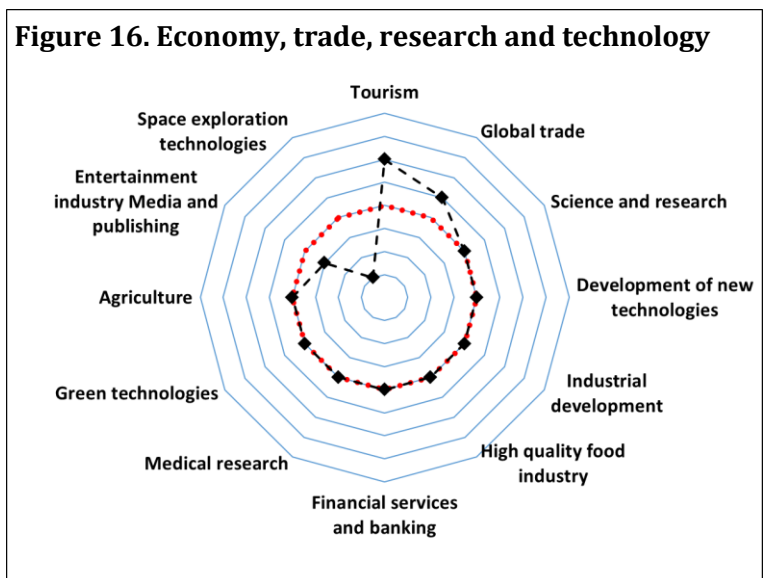
Social development, education

In the area of social development and education, Japanese respondents had the most positive views about EU's performance in terms of education and ensuring equality between men and women. They expressed least positive views about EU's performance in reduction of income inequalities, eradication of poverty and protection of minorities. Across the remaining fields, the Japanese were relatively more positive with regards to EU's performance in ensuring social justice and solidarity.



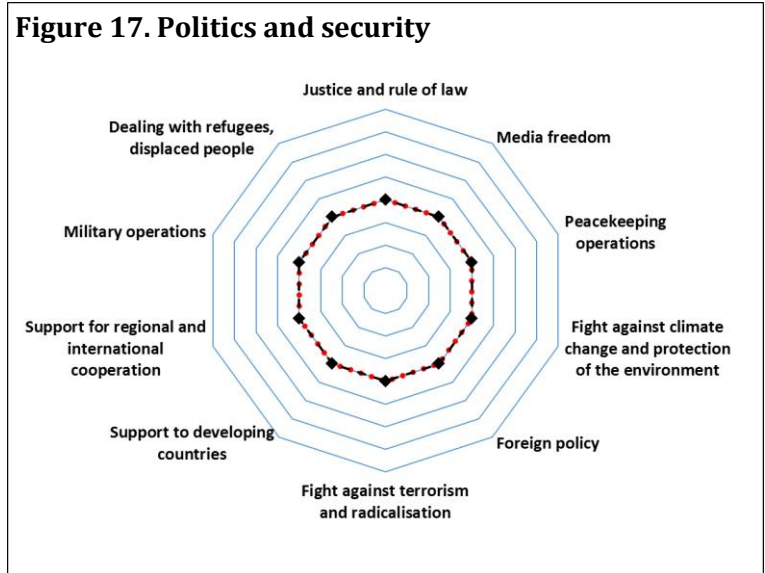
Economy, trade, research and technology

In the area of economy and RS&T, respondents in Japan were most positive about the EU's performance in the field of tourism and the least positive in space exploration technologies. Across the remaining fields, the Japanese were relatively more positive about EU's performance in global trade and less positive about its performance in the entertainment industry, media and publishing.



Politics and security

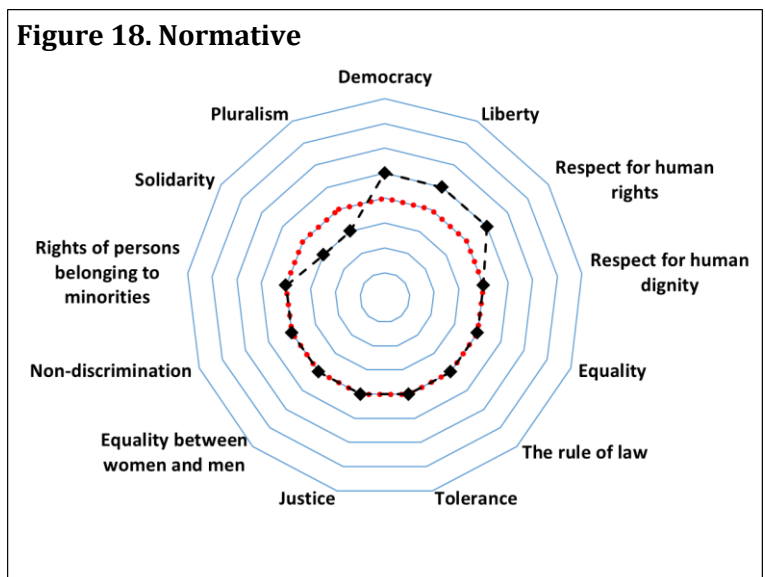
In the area of politics and security, Japanese respondents have not evaluated EU's performance in any of the fields particularly positively relative to each other.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1024). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

With regards to normative topics, Japanese respondents reported that their views are most similar to those of the EU on the issues related to democracy and liberty. They also found EU's views on pluralism and solidarity least similar to those of their own.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1024). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, older respondents in Japan hold somewhat more positive views on Japan-EU relations, EU attractiveness, the desirability and likelihood of its global leadership, and EU's influence across thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). In terms of **gender**, women have lower levels of awareness about the EU, and also less positive views on Japan-EU relations and the desirability and likelihood of EU global leadership.

Higher **income** was also linked to a more positive general view of the EU and Japan-EU relations, moreover, this group also found EU leadership more desirable. **Working status** and the level of education did not feature among explanatory criteria. Lastly, the **region of residence** accounted for some differences in perceptions – respondents from Hokkaido had a less positive general view of the EU, Japan-EU relations and found EU global leadership less desirable.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that feel they have **sufficient information on the EU**, and have had **contact with Europe**, reported having a more positive general view of the EU. Those that reported having contact with Europe also were more positive about Japan-EU relations, found EU more attractive, a more desirable and likely global leader, and more influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress).

Table 1. Demographic and familiarity with Europe predictors of perceptions

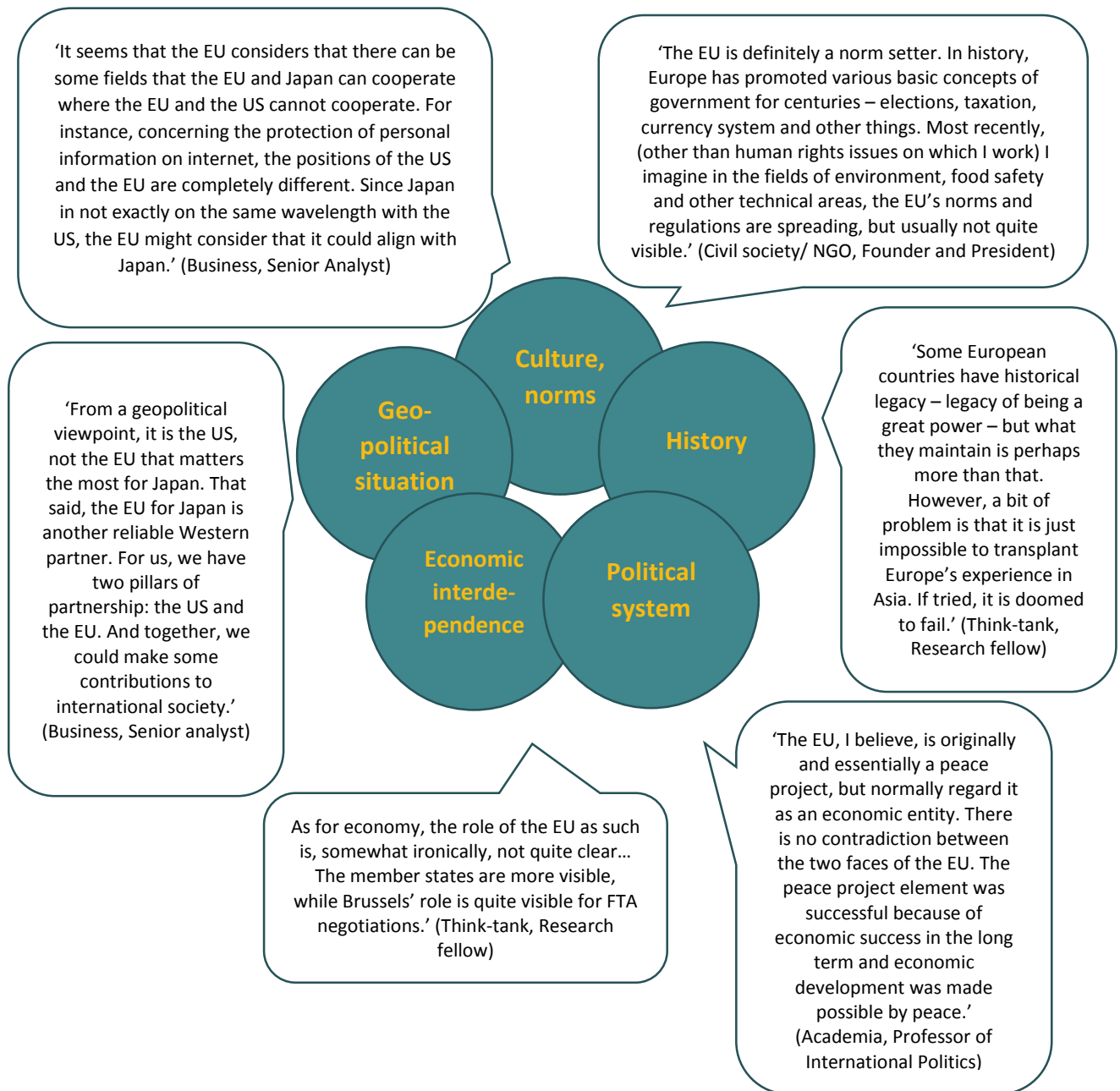
	Awareness of EU	General view of EU	Japan-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	...	Women ↓	...	Women ↓	Women ↓	...
Age	Older ↑	Older ↑	Older ↑	Older ↑	Older ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	...	More informed ↑	...	...	...	...	...
Income	...	Higher income ↑	Higher income ↑	...	Higher income ↑	...	...
Level of education
Working status
Region	...	Hokkaido ↓	Hokkaido ↓	...	Hokkaido ↓	...	...

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). (N = 1024). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Japanese views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



9 MEXICO



Executive Summary

In Mexico awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below most of the countries, above only India, but higher than other international organisations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather high – only under 10% of respondents never hear about it or cannot provide an opinion, while over half – 60.3% hear about it week or more often. The main sources for getting info on the EU are TV channels, social media, and online media (including online versions of print media). Most visible themes regarding the EU news in print media used for analysis are politics, economy and social and cultural, though the order of the latter two is reversed in the case of Europe.

The EU was among the most positively viewed countries and international organisations in Mexico. Mexico respondents find the EU among the top 3 most influential, important or attractive international actors in most areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among Mexico's respondents were 'multicultural', 'modern' and 'strong'. However, as regards representations of the EU in the media, Mexico newspapers evaluated it mostly neutral, and slightly more negatively than positively, the opposite being true for Europe, which was evaluated more neutrally overall. Media regards the EU ambiguously across policy areas: there is criticism with regards to internal EU policies, such as a possible UK exit, the Greek debt crisis, the Union's overall state of economy, and its approach to the migration crisis; meanwhile the EU's image is positive in the fields of human rights, good governance, negotiations with Iran, and EU-Mexico relations.

As concerns desirability and likelihood of EU global leadership, the Mexican public ranks the EU higher than all other countries in terms of desirability of its global leadership, but behind the US, close to Japan and China in terms of the likelihood of it assuming the role. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for its monuments and museums and the arts, and relatively least so for the theatre and cinema. In different areas linked to social development and education, the EU is seen best for education and quality of life and least positively for protection of minorities and integration of migrants and refugees. In economy and RS&T, the EU is best regarded for tourism and relatively least so for space exploration technologies. As regards politics and security, Mexico respondents were most positive about EU's performance in peacekeeping operations and ensuring media freedom and least positive about its efforts in supporting developing countries and dealing with refugees and displaced people.

[\[→ Full Country Chapter: Final Report Chapter 3.6 p.156\]](#)
[\[→ List of potential partners: Final Report Table 27: p.274\]](#)



Context

Mexico became EU's Strategic Partner in 2008. Related key documents: Global Agreement on Economic Partnership, Political Coordination and Cooperation (1997).

The section of the related to trade in goods entered into force in 2000 and that related to trade in services followed in 2001.

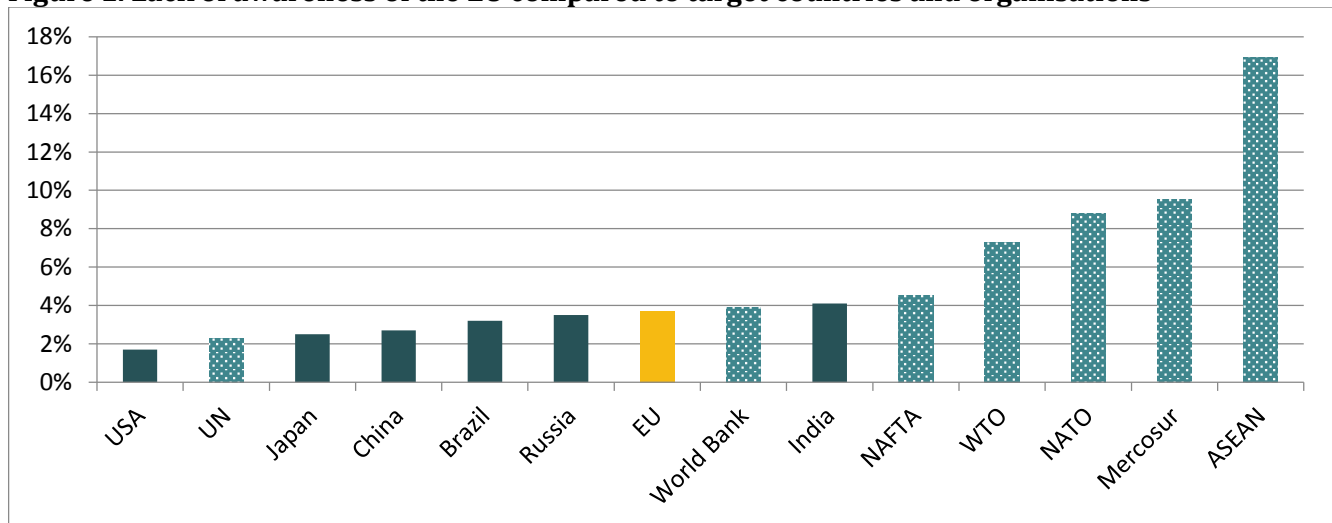
EU is the second biggest export market for Mexico after USA. EU imports in goods: €18.2 bn, EU exports in goods: €28.5 bn (2014 data).

Visibility

Awareness of the EU in Mexico – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in Mexico awareness of the EU is below that of most of the countries used for comparison (surpassing only India). Mexico's general public, however, finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1164).



Compared to other countries, awareness of the EU in Mexico (4% unaware/ 96% aware) is the relatively high, together with the ones of South Korea, Russia (both 4% unaware/ 96% aware) and China (3% unaware/ 97% aware).

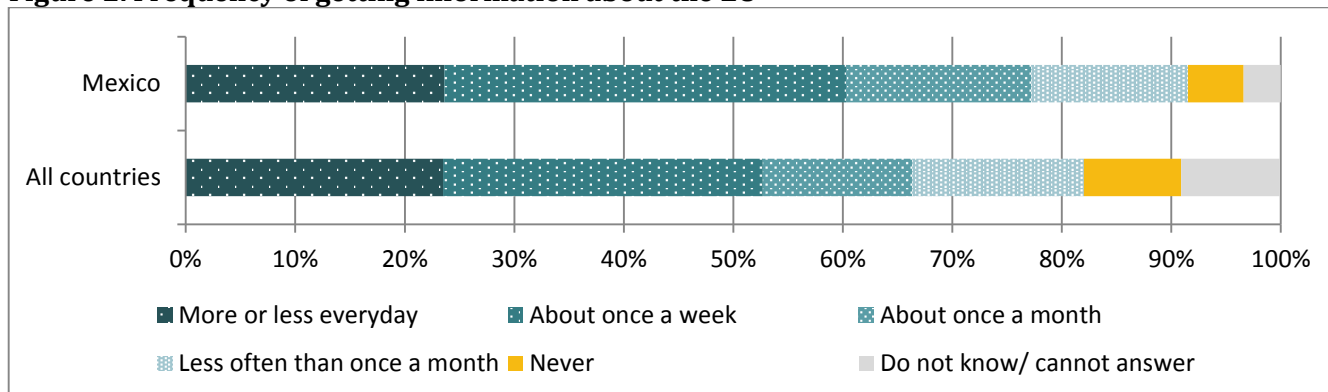
[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in Mexico is relatively high. Most Mexico respondents (37%) stated that such information would reach them about once

a week. The other two largest respondent groups hear or read about the EU more or less everyday (24%) or about once a month (17%). Meanwhile, the smallest group of Mexico (5%) respondents, after those, that could not provide an opinion, stated that they never hear or read about the EU.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1164).



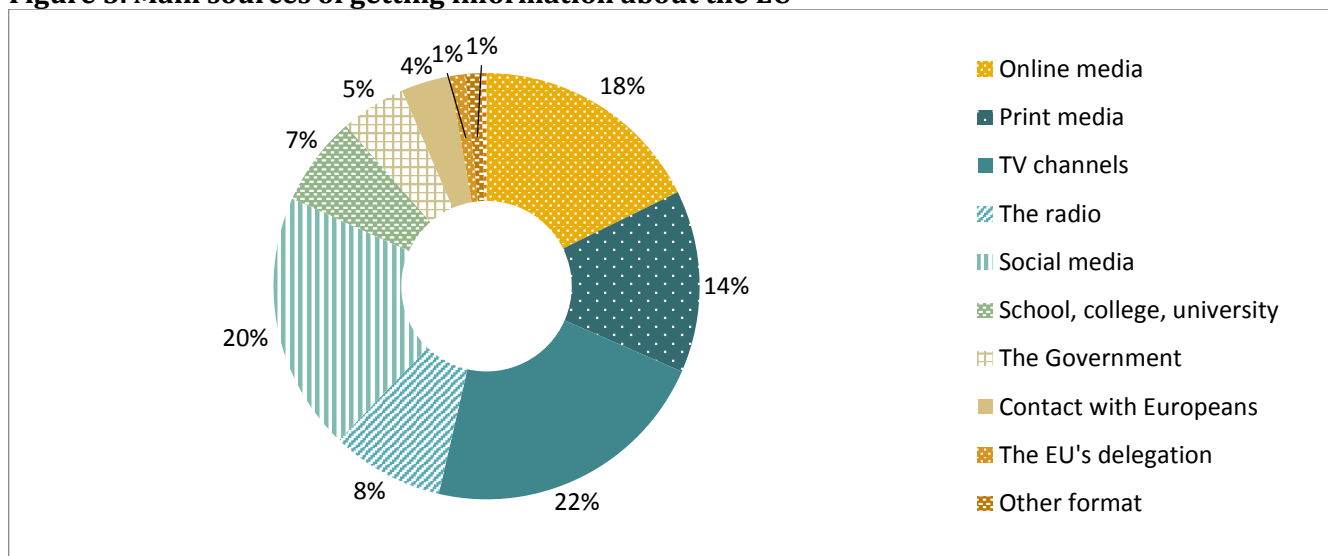
The frequency of hearing or reading about the EU in Mexico, as compared to results in other Strategic Partner countries, is relatively high. The share of Mexican respondents who stated that information about the EU would never reach them is among the lowest compared to results in other SP countries.

[→ comparative overview]

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in Mexico are TV channels (22%), social media (20%) and online media (18%). Meanwhile, print media (14%) in comparison proved a less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 1068).



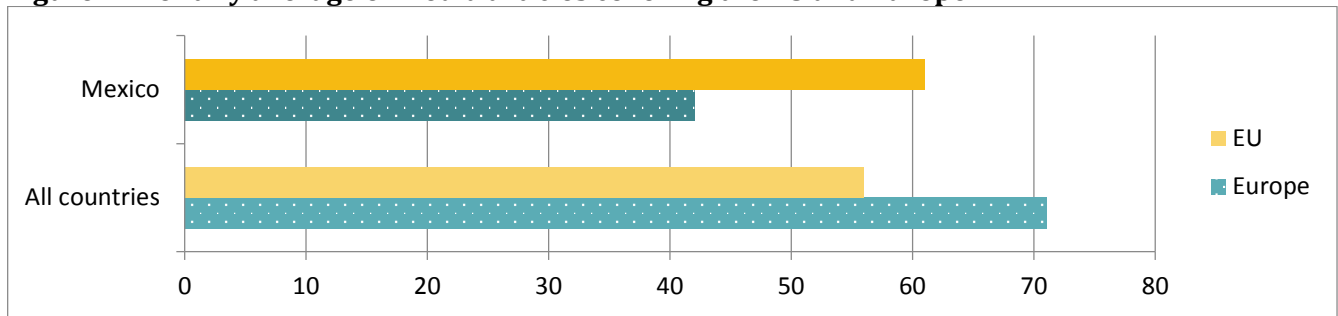
Compared to the other 9 SP countries, Mexico respondents were the only ones that rated social media rated in the second place among most popular channels of EU-related information.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected Mexico popular and business print media outlets mention the EU (monthly average – 61 articles) more frequently than Europe (42).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in El Universal, La Jornada and El Financiero (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



The proportion of Mexican articles mentioning the EU more often than Europe is contrary to the general tendency in the rest of the Strategic Partner countries, where Europe is covered more frequently (71) than the EU (56).

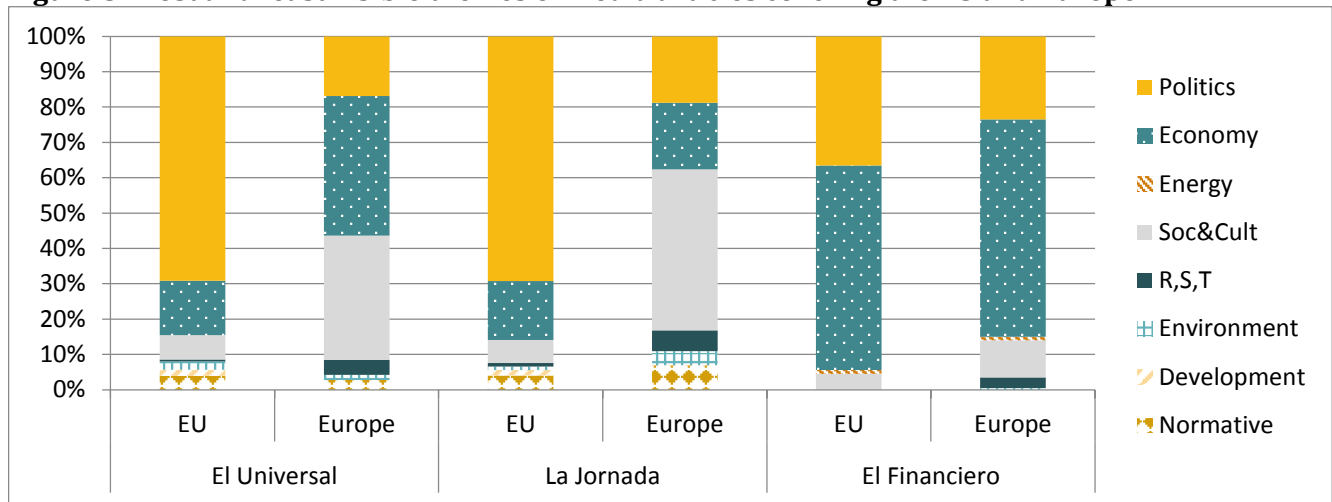
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of Mexico media coverage of the EU concerns politics (108 articles/month) and the economy (54), and, to a much lesser extent, social and cultural issues (11), with other topics getting little media coverage (11). In political news coverage concerning the EU, the main internal EU issue was Grexit, while most news concerning external EU politics focused on EU-Mexico relations. In economic news related to the EU, the state of the economy was the dominant subtheme. Finally, social and cultural news, the third most popular frame in EU-related news in Mexico, mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were energy, RS&T, development and environment.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Also other themes (RS&T, partially environment) are covered more often than in articles mentioning the EU.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in El Universal, La Jornada and El Financiero (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



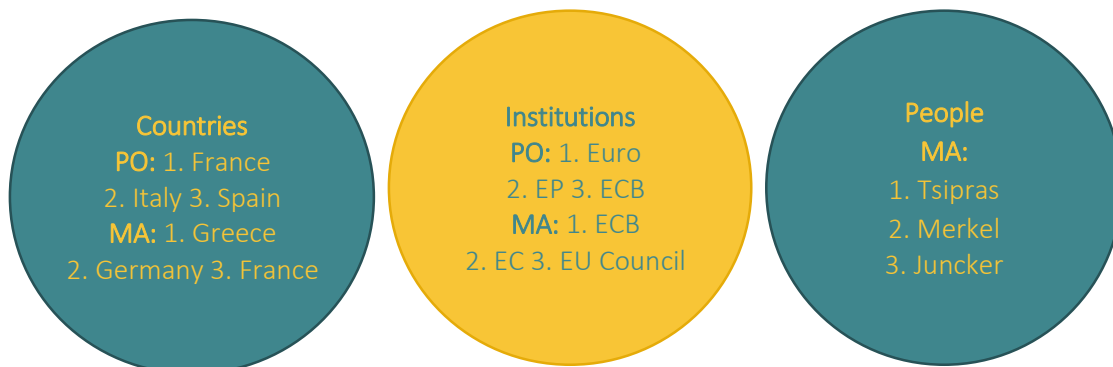
Though media analysis results in Mexico show very similar tendencies to the coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering), only in Mexico, the US and Japan politics is a more visible frame than economy.

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for Mexico respondents the most attractive EU Member States are France, Italy and Spain. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and France.
- The results concerning institutions also show similar tendency. While the survey revealed the ECB as the second most recognisable institution, media analysis results for the EU dataset show ECB in the first place, probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – EU state of economy and Grexit.

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in El Universal, La Jornada and El Financiero during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1164).



In this case tendencies in Mexico are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit and the state of the economy in the EU during the media monitoring period.

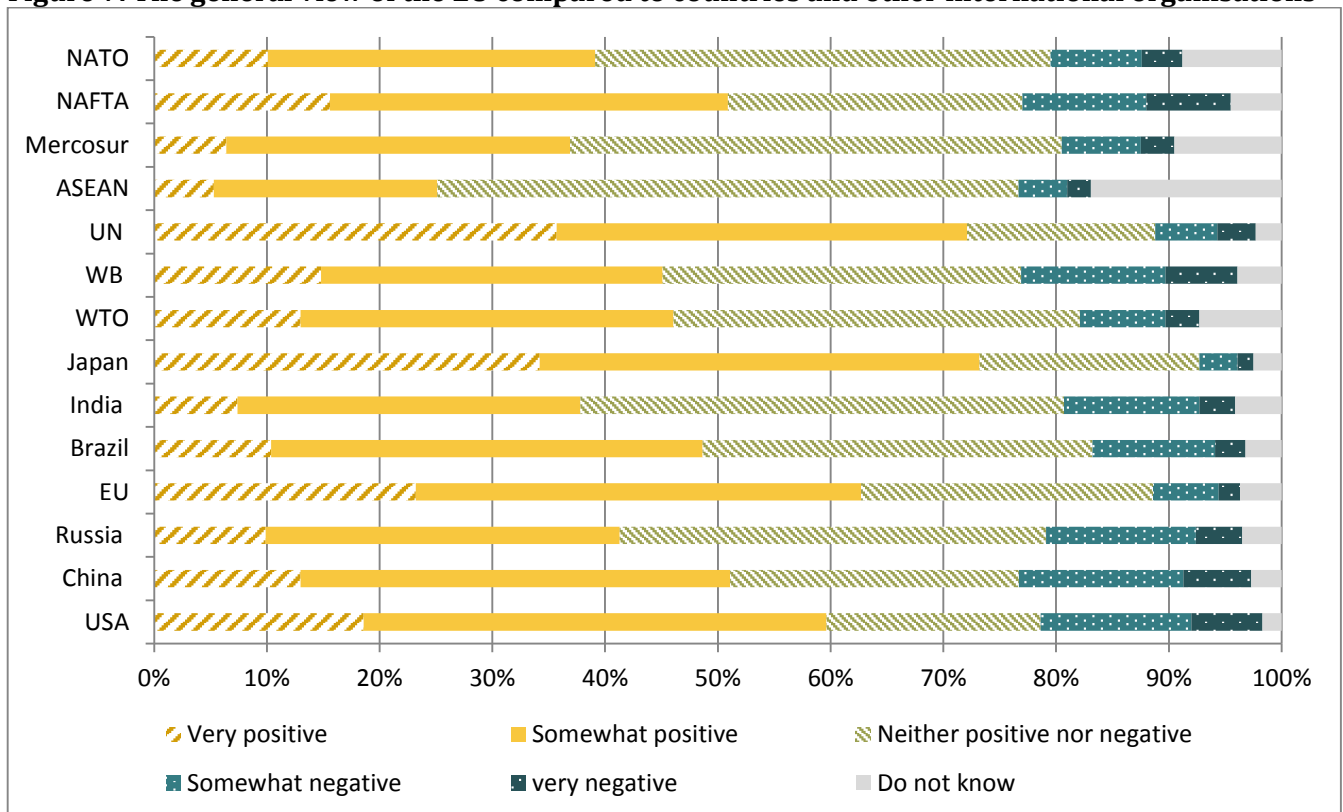
[\[→ comparative overview \]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of Mexico’s general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only Japan, and in the case of the latter – it outranked all organizations except the UN. A total of 63% of Mexico respondents viewed the EU positively, compared to 8% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1164).



Looking at how the EU is evaluated in Mexico as compared to in the other Strategic Partner countries, Mexico and India respondents evaluated the EU most positively. Negative evaluations in Mexico were similar to the 10-country average.

[\[→ comparative overview \]](#)

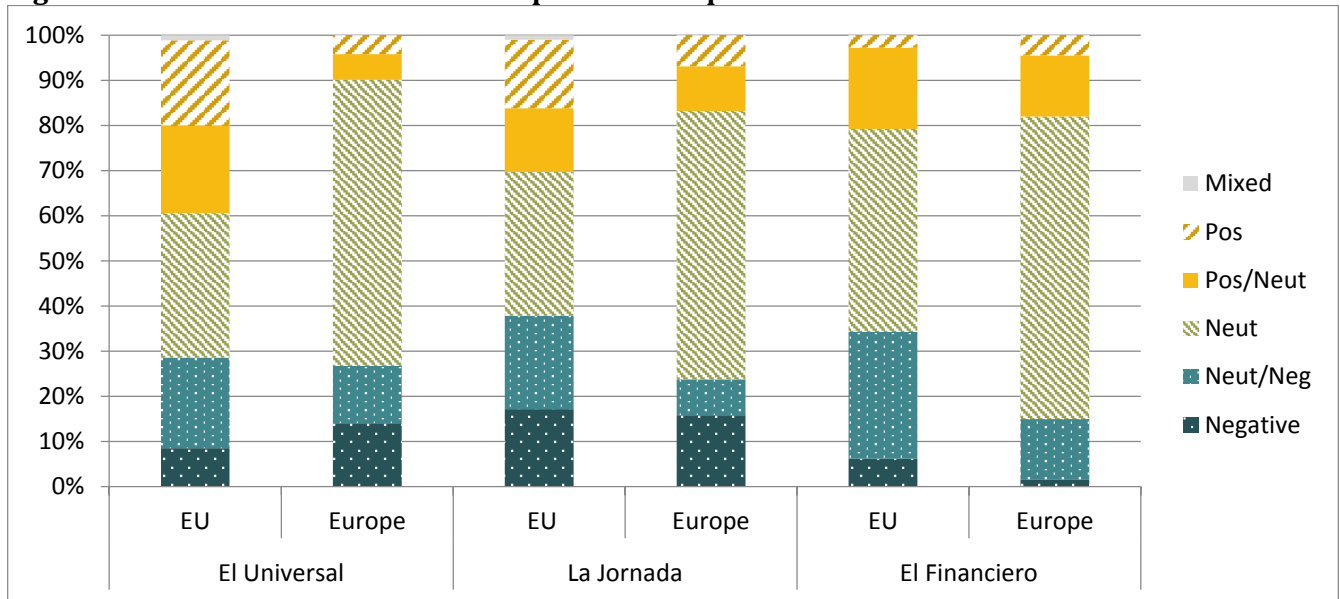
Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Mexico newspapers evaluated it slightly more negatively than positively – some 29% of articles had the EU framed positively as

opposed to 34% where it was framed negatively (Figure 8). Europe coverage in Mexico was more positive and also neutral in evaluations – Europe was evaluated positively in 21% of the articles and negatively in 17%. There were no noticeable differences in the evaluations of both Europe and EU across the two popular and the business dailies.

The EU is regarded ambiguously across policy areas: while media strongly criticise internal EU policies, such as a possible UK exit, the Greek debt crisis, the Union’s overall state of economy, and its approach to the migration crisis in the Mediterranean, the EU’s image is very positive in the fields of human rights, good governance, negotiations with Iran, and EU-Mexico relations.

Figure 8. Evaluation of the EU and Europe in Mexico printed media

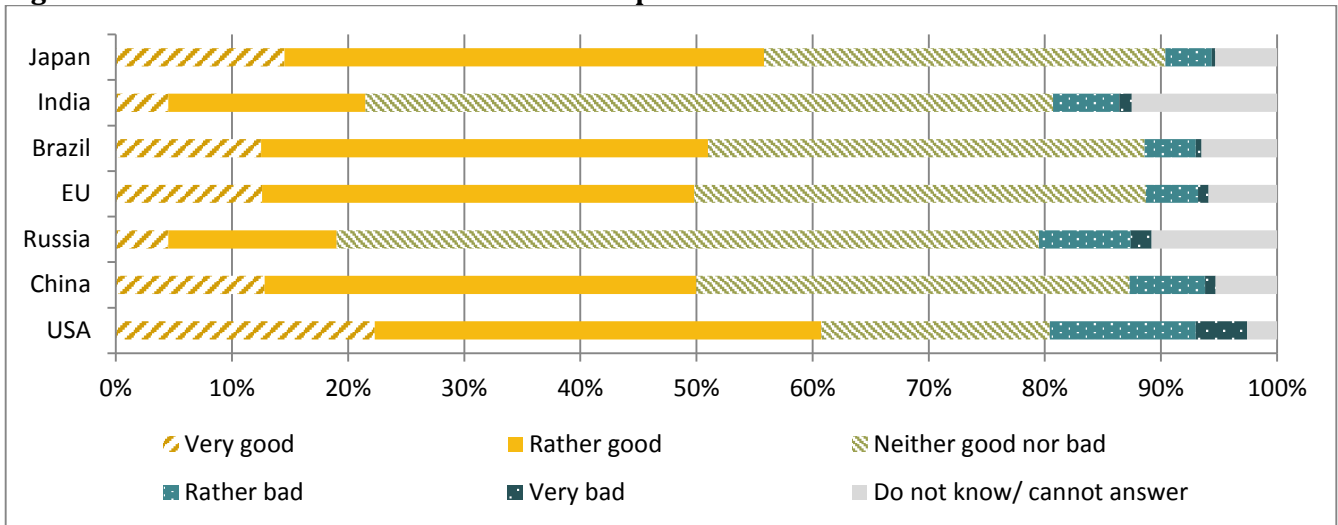


Note: Based on observation of news articles mentioning the EU and Europe in the El Universal, La Jornada and El Financiero (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with Mexico

According to the public opinion poll, the Mexico general population views their country’s relationship with the EU to be mostly good, behind that with the US and Japan only. Some 50% of respondents view it as good, compared to 5% that view it negatively (Figure 9). Interestingly, respondents gauged Mexico-EU relations less positively than their general view of the bloc by as much as 13 percentage points. This reveals that while Mexico’s general public have a positive view of the EU, they are more ambivalent about Mexico-EU bilateral relations.

Figure 9. Evaluation of the Mexico's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the Mexico's overall relationship with each of the following countries and organisations? (N = 1164).



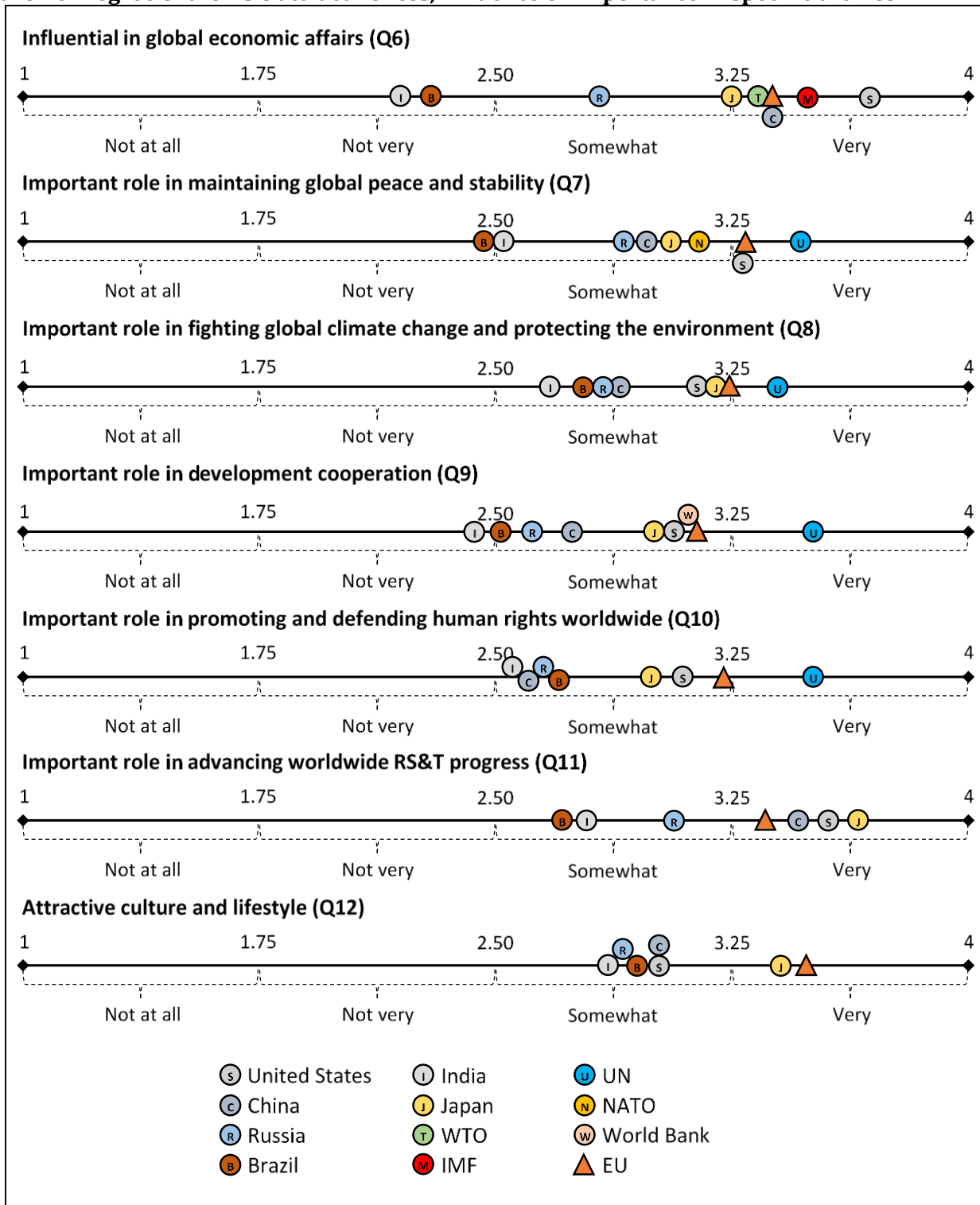
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, Mexico doesn't stand out, and the extent of positive and negative evaluations is close to the 10-country average.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in Mexico sees the EU as a somewhat to very influential, important and attractive international actor across the areas listed in Figure 10. Looking comparatively at which areas the EU was seen as more important, global economic affairs, maintaining global peace, advancing worldwide RS&T, and upholding an attractive lifestyle stand over others. Furthermore, the EU is among the top 3 most influential, important and attractive international actors in most of the thematic areas listed in the Figure 10 except RS&T. In the case of RS&T, the Mexican general public found the role of Japan, US, and China more important in advancing innovation and technological progress worldwide than the EU.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1164). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that

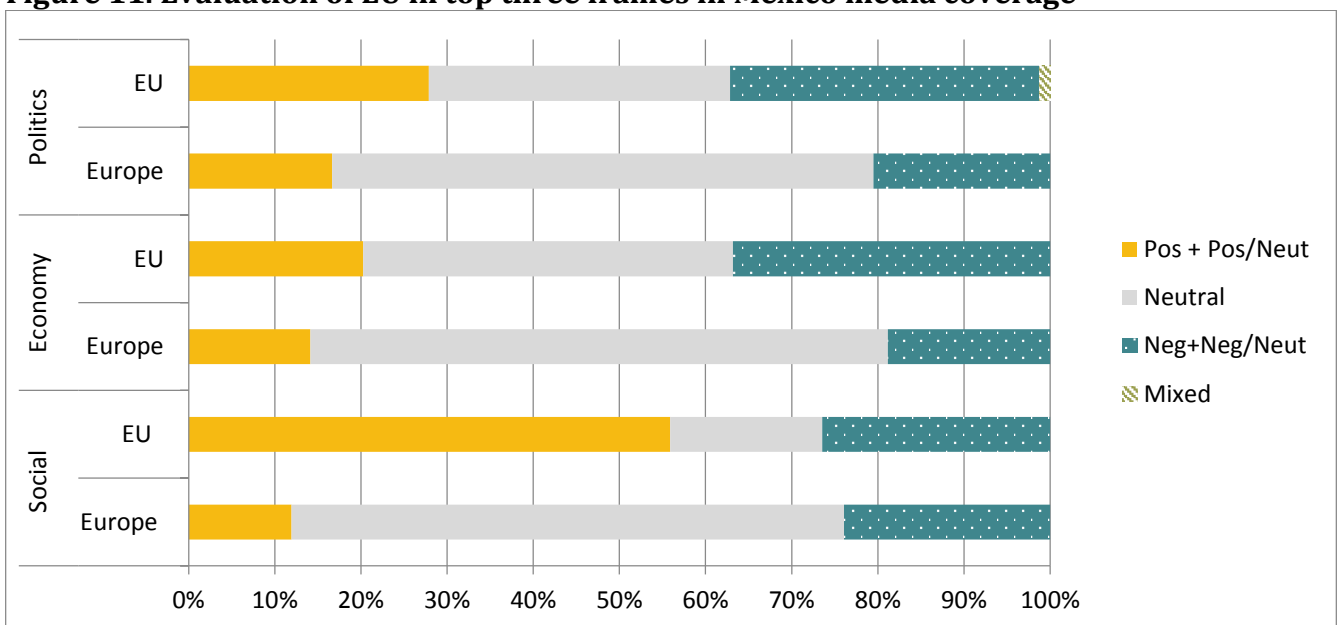


Looking comparatively at how influential SP country populations find the EU across thematic fields listed in Figure 10, in Mexico the EU is seen as relatively more influential in global economic affairs, more important in advancing worldwide RS&T progress, and finally more attractive as compared to the view of the general public in other SP countries.

[\[→ comparative overview \]](#)

appeared in Mexico media coverage: economy, social and politics, Europe was consistently evaluated more neutrally than the EU. The EU was most often framed positively in the social frame – over half of articles on the EU and social issues had positive evaluations. Political and economic coverage of the EU was more often framed negatively than positively. Europe coverage was balanced in the extent of positive and negative evaluations.

Figure 11. Evaluation of EU in top three frames in Mexico media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the El Universal, La Jornada and El Financiero (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

Most common descriptors used by general population in association to EU

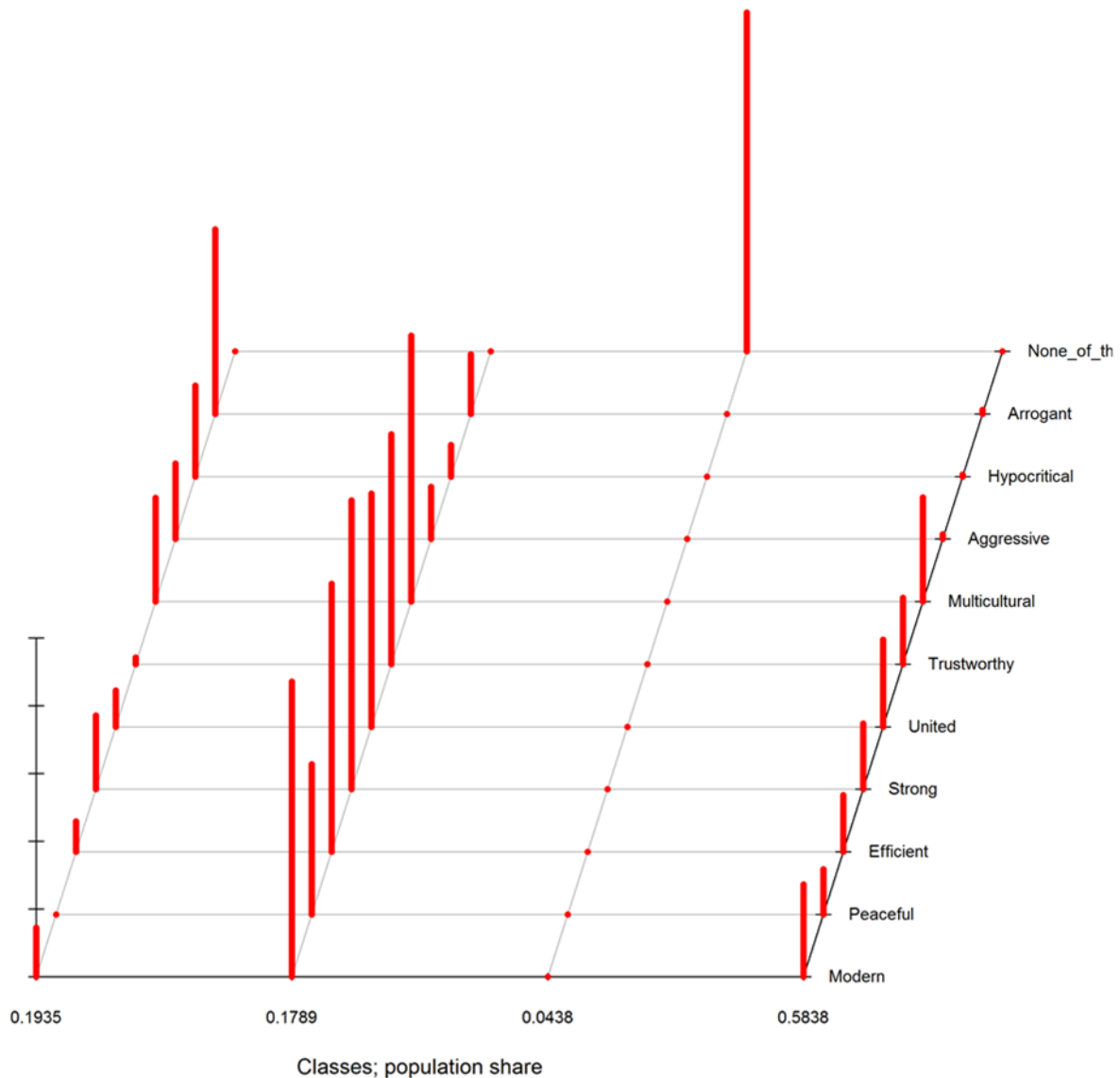
The general population in Mexico chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in Mexico:

- Only positive, but few descriptors – 58% (top 3: multicultural, modern, strong).
- Mixed, but mostly positive and many descriptors – 18%.
- Mixed, but mostly negative – 19% (top 3: arrogant, multicultural, hypocritical).
- No opinion on the EU and its descriptors – 4%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the two classes that mostly used positive descriptors – the 58% (right-most)

and 18% classes, compared to that, which used mostly negative descriptors – the 19% class (left-most).

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1164) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all 10 SP countries except in Russia, the general population in Mexico chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, the Mexican population doesn't stand out, only in the very small percentage of respondents that didn't have an opinion. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

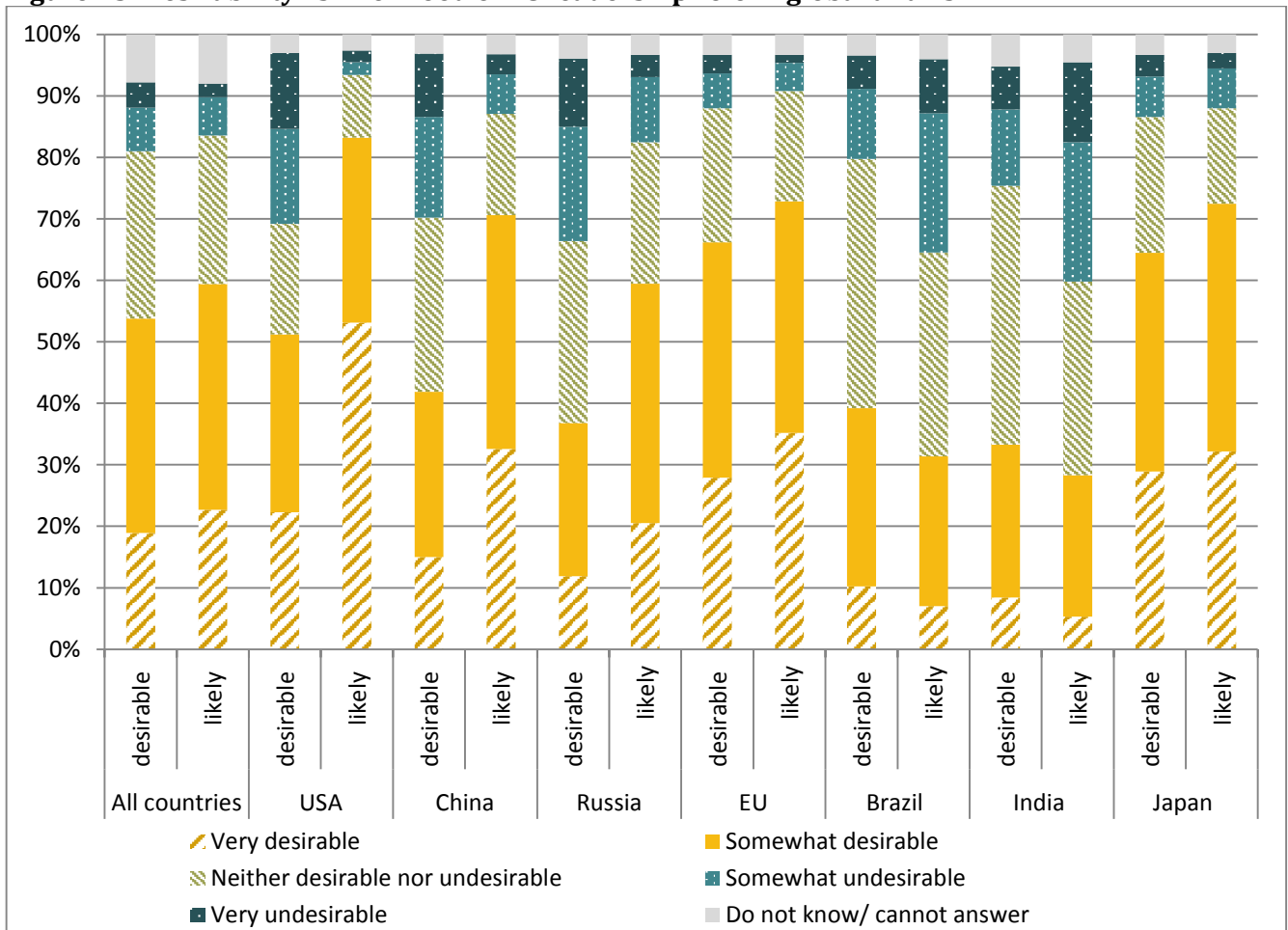
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public finds EU global leadership both desirable and, more so, likely. Looking at desirability of its leadership, the EU stands above the countries used in comparison. Regarding the likelihood of it assuming this role, however, the EU fared well behind the US, and similarly to Japan and China.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1164)



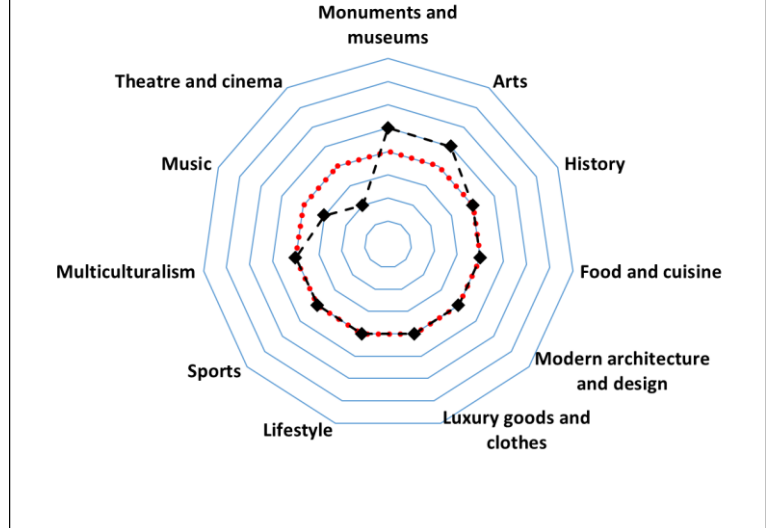
Looking comparatively at how desirable and likely EU global leadership is perceived to be by the general publics of the SP countries, in Mexico it is seen as both most desirable and most likely.

[\[→ comparative overview \]](#)

Culture

In the area of culture, the general public in Mexico had the most positive views towards the EU's effectiveness with regards to monuments and museums, as well as the arts. In contrast, they expressed least positive views on EU's performance in the theatre and cinema. Across the remaining fields, Mexican respondents expressed relatively less positive views about EU's performance in music than in any other field.

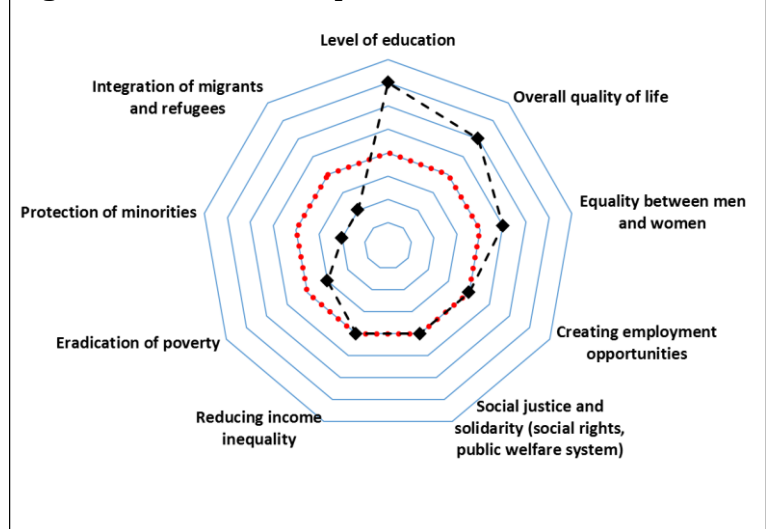
Figure 14. Culture



Social development and education

In the area of social development and education, Mexican respondents had the most positive views regarding EU's performance in terms of education and quality of life. They expressed least positive views about EU's performance in protection of minorities and integration of migrants and refugees. Across the remaining fields, Mexico respondents were relatively more positive views about EU's performance in ensuring gender equality and relatively less positive about its track record in eradication of poverty.

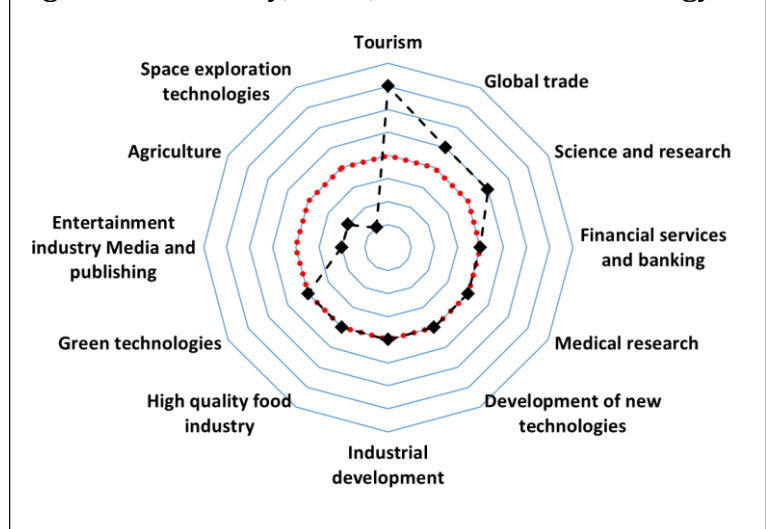
Figure 15. Social development, education



Economy, trade, research and technology

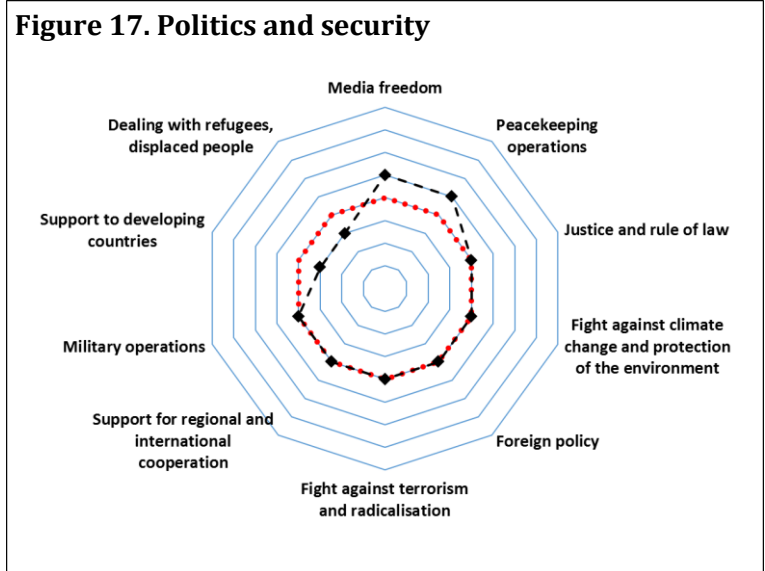
In the area of economy and RS&T, respondents in Mexico were most positive about the EU's performance in the field of tourism and the least positive in space exploration technologies. Across the remaining fields, they expressed notably less positive views towards the EU's performance in the fields of agriculture and the entertainment industry, media and publishing. Furthermore, Mexicans were relatively less positive about EU's performance in the field of global trade, as well as science and research.

Figure 16. Economy, trade, research and technology



Politics and security

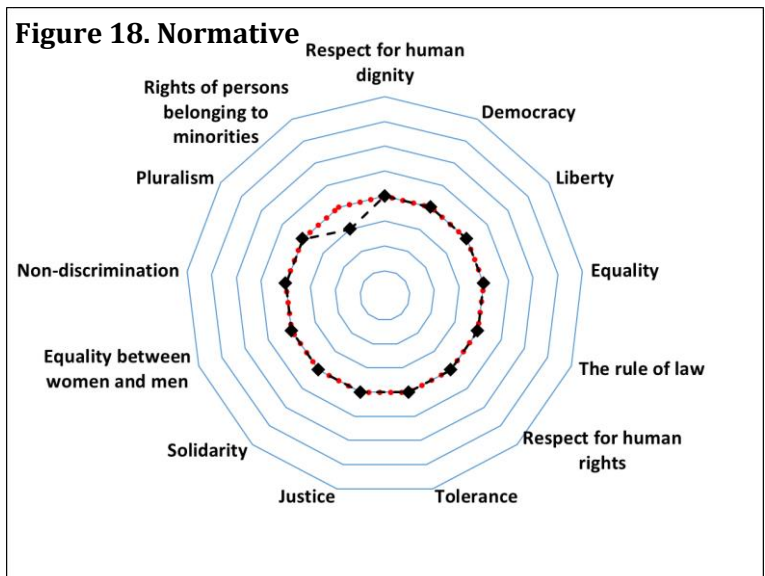
In the area of politics and security, respondents in Mexico were most positive about EU's performance in peacekeeping operations and ensuring media freedom. They expressed least positive views about EU's efforts in supporting developing countries and dealing with refugees and displaced people.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1164). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

Across the different normative issues, Mexican respondents reported that their views are similar to those of the EU on all of the listed issues. However, in terms of pluralism, slightly less respondents found similarity in their personal point of view with that of the EU's than in terms of all other normative issue.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1164). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, older respondents were more likely to find the EU more attractive, and also found the bloc to be more influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). In terms of **gender**, women have less positive views on the EU in general, Mexico-EU bilateral relations, and find EU global leadership less desirable.

Higher **income** was also linked to more positive views in general and across specific thematic fields, and as concerns Mexico-EU relations. This group also found the EU to be more attractive, and a more desirable and likely global leader. **Working status** also featured among explanatory criteria – respondents who were employed at the time of the study had a more positive general view of the EU and Mexico-EU relations, and found EU global leadership more desirable. **Education** was also among the explanatory criteria – more educated respondents found EU leadership more likely. Lastly, the **region of residence** did not feature among explanatory criteria of the Mexican population’s perceptions of the EU.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Respondents that reported having **sufficient information on the EU** were more positive about Mexico-EU relations. Those that have had **contact with Europe** reported having a more positive general view of the EU and Mexico-EU relations, and also found the EU to be more attractive.

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	Mexico-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	...	Women ↓	Women ↓	...	Women ↓	...	...
Age	Older ↑	...	...	Older ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	...	...	With contact ↑
Sufficiently informed	More informed ↑	...	...	...	...
Income	...	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑
Level of education	More educated ↑	...
Working status	...	Employed ↑	Employed ↑	...	Employed ↑	...	...
Region

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1164). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Mexican views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



10 RUSSIA



Executive Summary

In Russia awareness of the EU compared to a list of preselected countries and organisations used for comparison is below all countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather high – as many as 64% of respondents hear about it more or less every day, and only 3% of respondents said they never hear about it. The main sources for getting info on the EU are TV, online media (including online versions of print media) and social media. Most visible themes in EU news in print media used for analysis are economy, politics and energy, while for Europe these were social and culture, followed by the economy and politics.

The EU was among the least positively viewed countries and international organisations in Russia. Russia respondents find the EU as somewhat influential, important or attractive actor in most thematic areas except development cooperation, where its importance is seen as relatively lower. Most common descriptors for the EU among Russia's respondents were 'hypocritical', 'multicultural' and 'arrogant'. As regards representations of the EU and Europe in the media, Russia newspapers evaluated both the EU and Europe mostly neutrally, with balanced positive and negative evaluations in both cases. In Russian media, the EU is frequently reported on, often with a local hook (e.g. sanctions), suggesting that the EU is presented by the influential news media as a close 'Other' able to impact Russia politically and economically.

As concerns desirability and likelihood of EU global leadership, the Russian public is divided in that a similar percentage of the public find it desirable as undesirable, and a larger percentage finds it likely that the EU will assume a leadership role. Compared to how Russians view preselected countries and organizations in this respect, EU leadership is less undesirable only than that of the US, while the likelihood of its leadership is higher than that of Brazil, India and Japan. Looking specifically at EU's effectiveness within different fields, comparing different sub-fields in the area of culture, the EU is best regarded for its monuments and museums as well as luxury goods and clothes, and relatively least so for history. In different areas linked to social development and education, the EU is seen best for education, quality of life and gender equality and least positively for integration of migrants and refugees and eradication of poverty. In economy and Research Science and Technology (RS&T), the EU is best regarded for tourism and relatively least so for space exploration technologies. As regards politics and security, Russia respondents were most positive about EU's performance in terms of ensuring media freedom, rule of law and protecting the environment, and least positive in terms of how it deals with refugees and its role in peacekeeping operations.

[\[→ Full Country Chapter: Final Report Chapter 3.7 p.177\]](#)
[\[→ List of potential partners: Final Report Table 28: p.277\]](#)

RUSSIA



Context

The current basis for cooperation is the 1994 Partnership and Cooperation Agreement (came into force in 1997). Negotiations on a new EU-Russia Agreement were launched in 2008.

Ukraine crisis and EU sanctions limiting the economic relations since 2014.

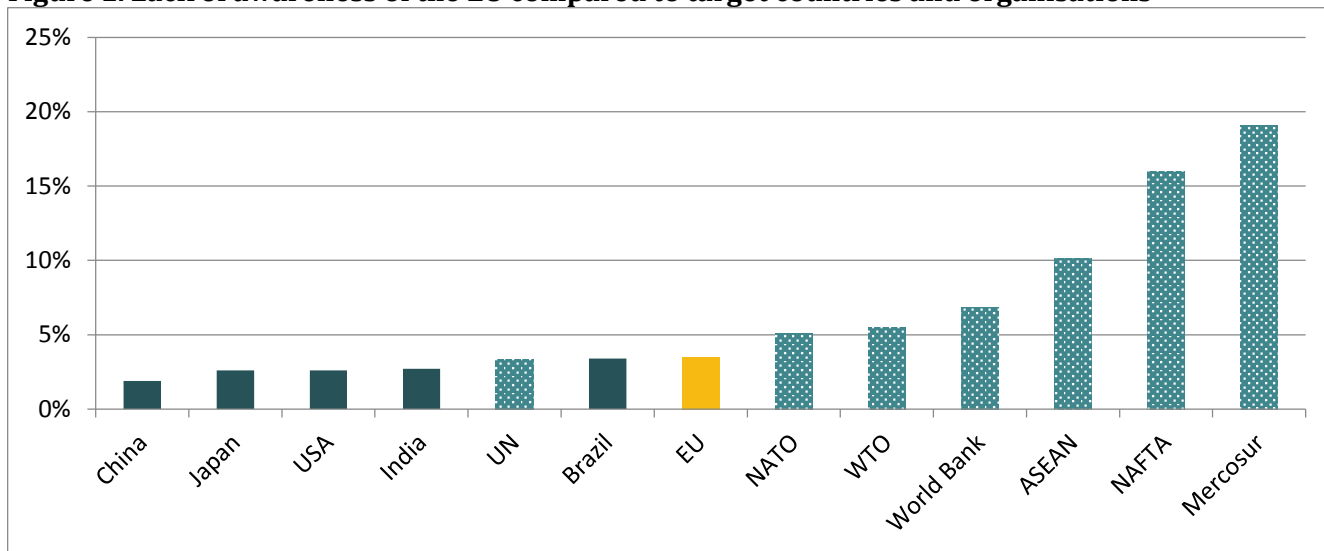
EU is the largest trading partner of Russia. EU imports in goods from Russia: €181.8 bn, EU exports in goods to Russia: €103.3 bn (2014 data).

Visibility

Awareness of the EU in Russia – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in Russia awareness of the EU is below that of the countries used for comparison. Russia general public, however, finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1321).



Compared to other countries, awareness of the EU in Russia (4% unaware/ 96% aware) is the relatively high, together with that in South Korea, Mexico (both 4% unaware/ 96% aware) and China (3% unaware/ 97% aware).

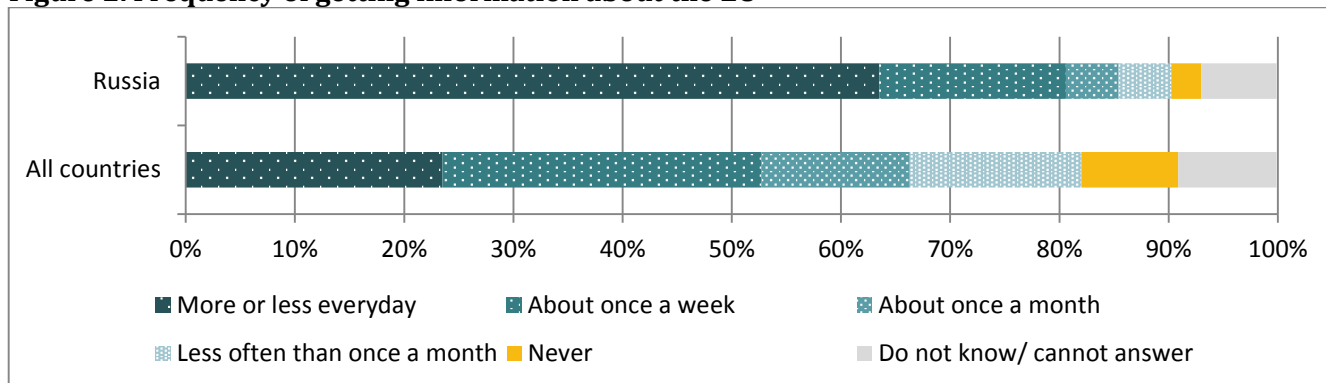
[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in Russia is relatively high. Most Russia respondents (64%) stated that such information would reach them more or

less every day. The other three largest respondent groups, besides the ones who could not provide an opinion, hear or read about the EU approximately once a week (17%), less often than once a month, or about once a month (both 5%). Meanwhile, the smallest group of Russia respondents (3%), stated that they never hear or read about the EU.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1321).



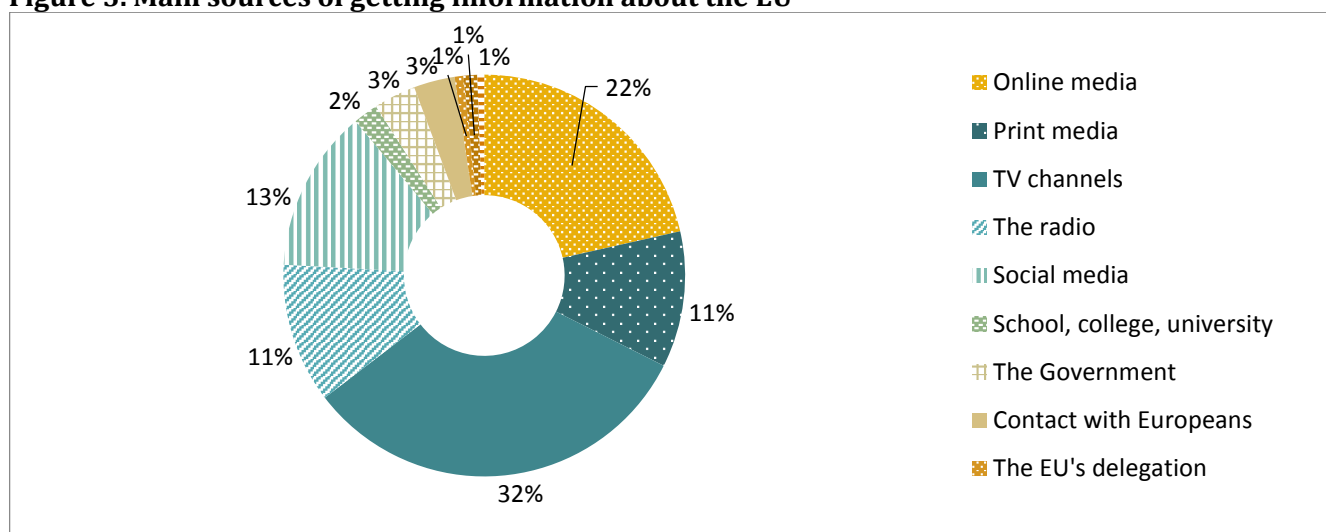
The frequency of hearing or reading about the EU in Russia, as compared to results in other Strategic Partner countries, is relatively high. The share of Russian respondents who stated that information about the EU would reach them more or less every day is the highest compared to results in other SP countries.

[\[→ comparative overview \]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in Russia are TV channels (32%), online media (22%) and social media (13%). Meanwhile, print media (11% - the same percentage as radio) in comparison proved a slightly less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 1193).



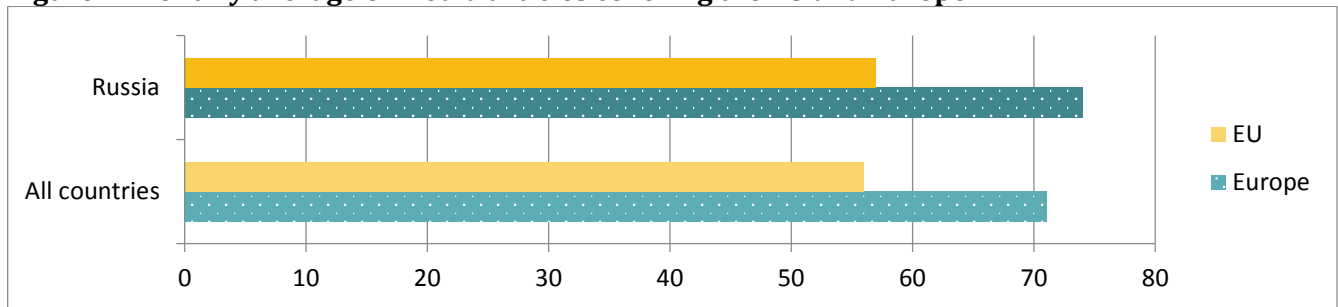
Compared to the other 9 SP countries, Russia respondents marked the same sequence of most popular media sources (TV channels, online media and social media) as those in Brazil and South Africa.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected Russia popular and business print media outlets mention Europe (monthly average – 74 articles) more frequently than the EU (57).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in Kommersant, Rossiyskaya Gazeta and Vedomosti (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, Russia has moderate coverage of EU and Europe, and, similarly to other countries, writes about Europe more frequently (71) than the EU (56).

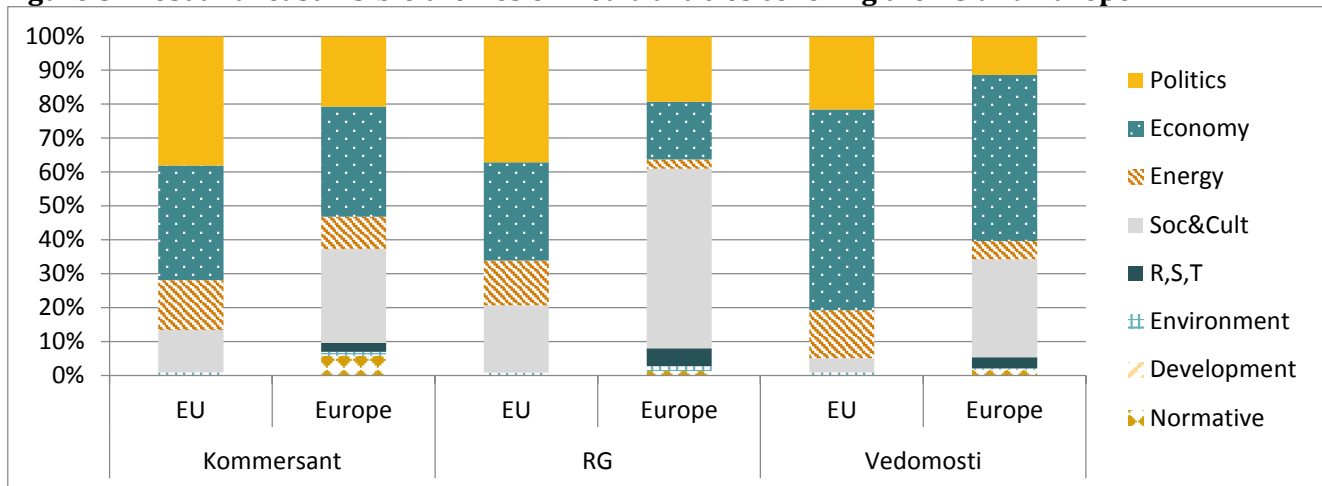
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of Russia’s media coverage of the EU concerns the economy (78 articles/month) and politics (57) and, to a lesser extent, energy (26) and social and cultural issues (20), with other topics getting little media coverage (2). In economic news related to the EU, trade was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on EU-Russia relations. Finally, energy news, the third most popular frame in EU-related news in Russia, was mostly focused on security of supply issues. The topics that appeared least often in news mentioning the EU were normative (where the EU is presented as a standard to follow in a specific issue or theme), development and RS&T.

The proportion of the most visible themes related to Europe quite distinctly differs from the one of the EU. In the case of Europe, the most popular theme is social and culture, followed by economy and politics. Also, other themes, with the exception of energy, (normative, environment, RS&T) are covered more often than in articles mentioning the EU. This partly coincides with the results of the survey: in Russia, respondents associated areas as economy and politics are first and foremost with the EU, whereas they more often linked social development, culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in Kommersant, Rossiyskaya Gazeta (RG) and Vedomosti (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Though media analysis results in Russia show very similar tendencies as in the media coverage of the EU in the other SP countries (politics and economy being the two most visible EU themes), only in Russia energy appeared among the top three frames.

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for Russia respondents the most attractive EU Member States are Germany, Italy and France. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and Italy.
- The results concerning institutions show a similar tendency both for survey and media analysis of EU articles, showing the ECB (with regards to other institutions) in the second place. The EP was second among symbols and institutions in the poll and third in the media, while the EC appeared first in the media analysis.
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in Kommersant, Rossiyskaya Gazeta and Vedomosti during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1321).



In this case tendencies in Russia are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit, Brexit and the state of the economy in the EU during the media monitoring period.

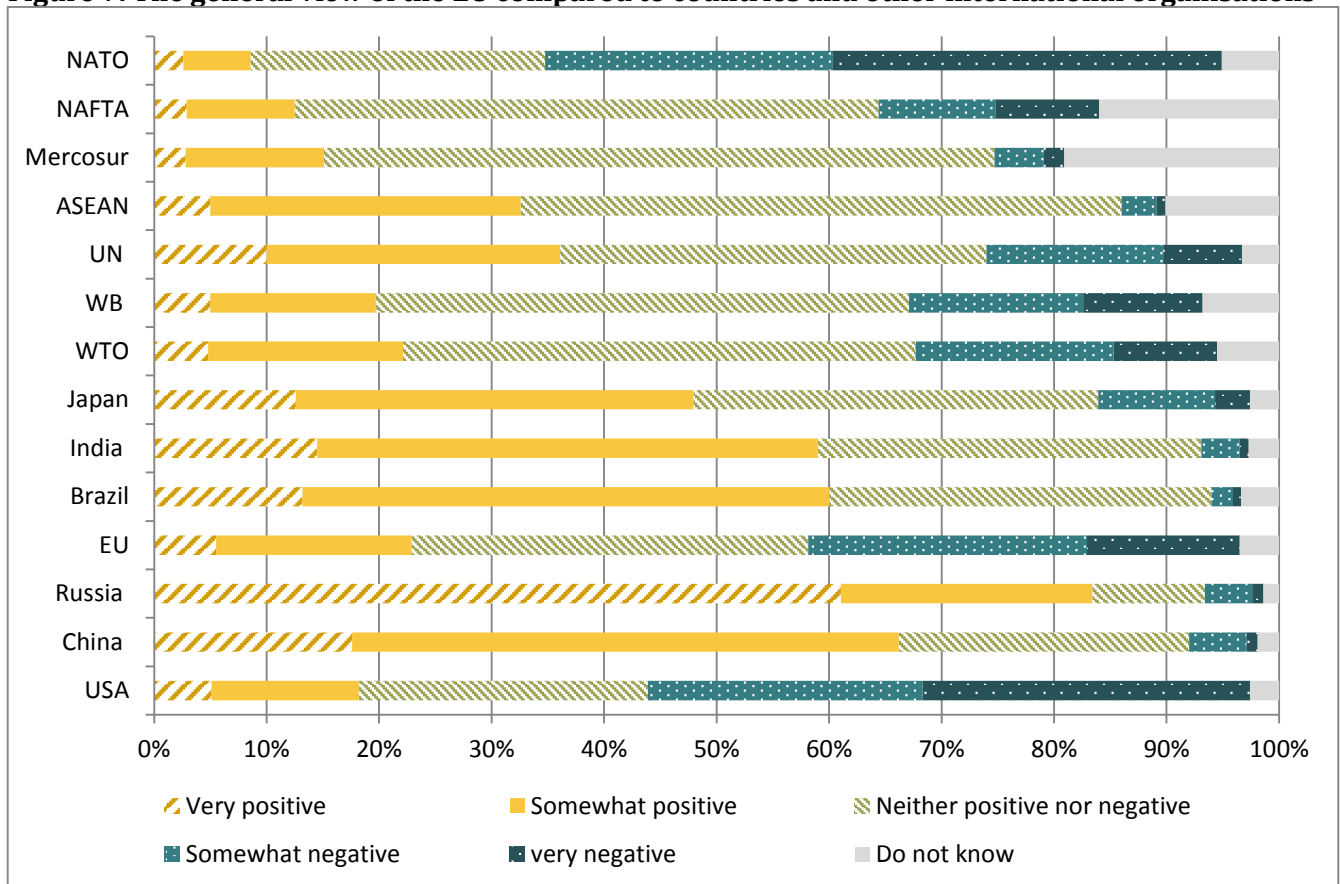
[\[→ comparative overview \]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of the Russian general population, the EU was not among the most positively viewed from a list of preselected list countries and multilateral organizations. In the case of the former, the EU appears below most countries, outranking only the USA. In the case of the latter, it was viewed less negatively than NATO, but more so than all other organisations. A total of 23% of Russia respondents viewed the EU positively, compared to 38% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1321).



Looking at how the EU is evaluated in Russia as compared to in the other Strategic Partner countries, evaluations in Russia were the most negative and least positive across the sample.

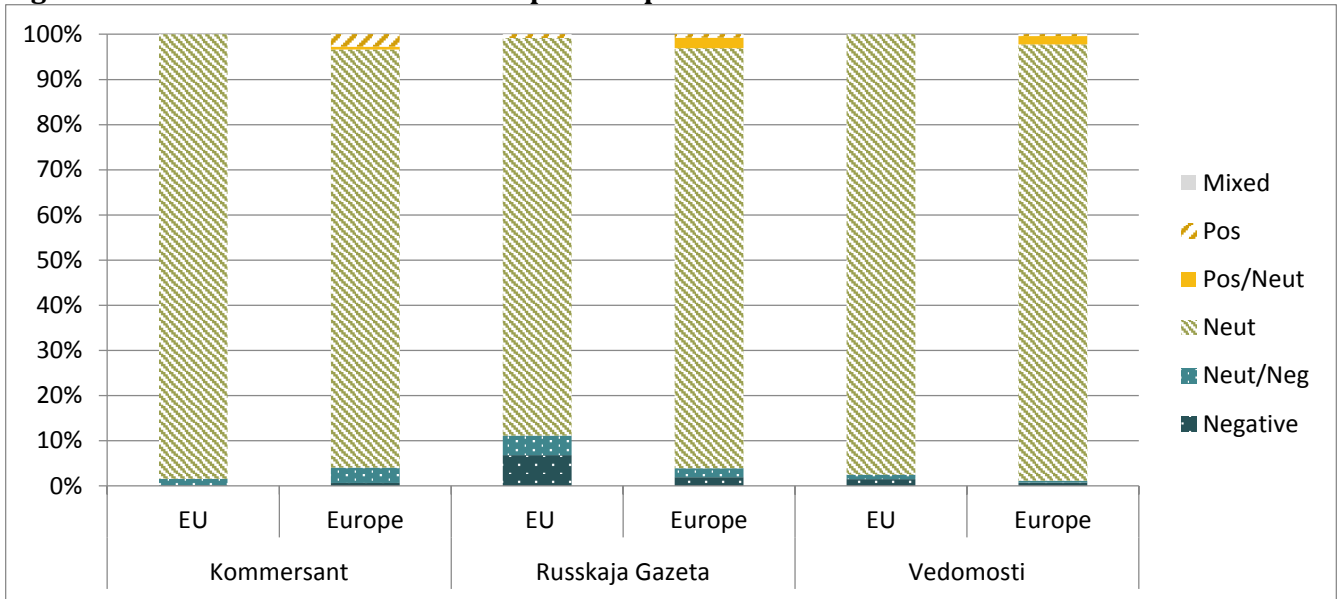
[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, Russian newspapers evaluated it mostly neutrally, in the case of the *Russkaja Gazeta* also somewhat more negatively than positively. On average, 0% of articles had the EU framed positively as opposed to 3% of articles that framed it negatively (Figure 8). Europe coverage is also mostly neutral - articles with both positive and negative evaluations accounted for 3% of the total dataset.

In Russian media, the EU is frequently reported on, often with a local hook (e.g. sanctions), suggesting that the EU is presented by the influential news media as a close ‘Other’ able to impact Russia politically and economically.

Figure 8. Evaluation of the EU and Europe in US printed media

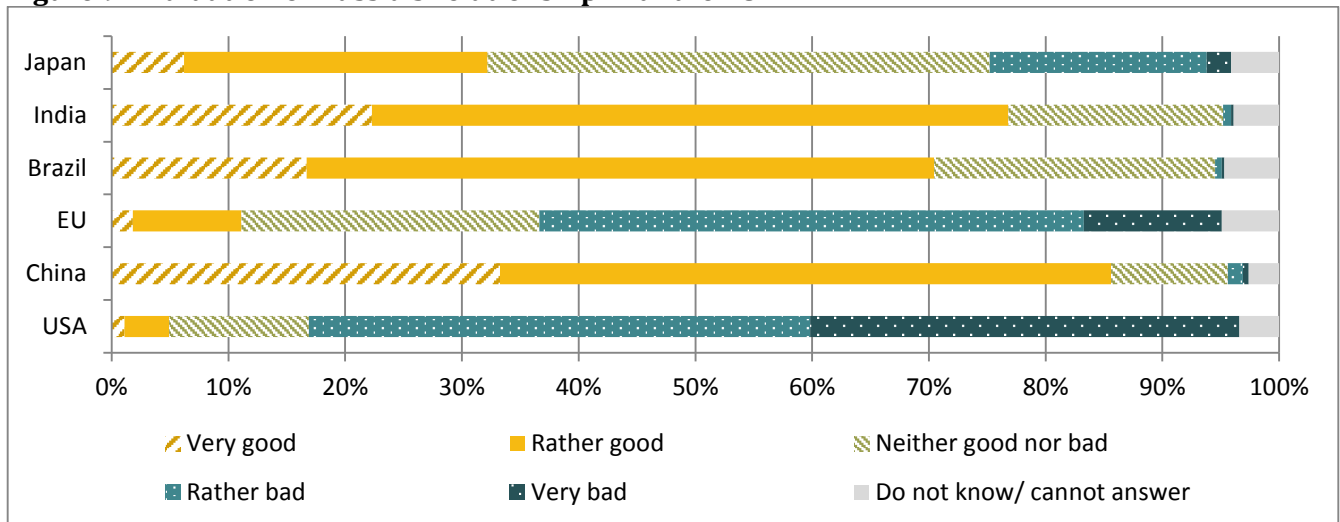


Note: Based on observation of news articles mentioning the EU and Europe in the *Kommersant*, *Russkaja Gazeta* and the *Vedomosti* (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with Russia

According to the public opinion poll, the Russian general population views their country’s relationship with the EU to be mostly bad, better only than that with the US. Some 11% of respondents view it as good, compared to 58% that view it negatively (Figure 9). Russian respondents’ general evaluation of the EU was more often positive and less often negative than their view of Russia-EU relations, signalling that while the relationship is seen in a particularly negative light, the view of the bloc as such is less affected by this dynamic.

Figure 9. Evaluation of Russia's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the Russia's overall relationship with each of the following countries and organisations? (N = 1321).



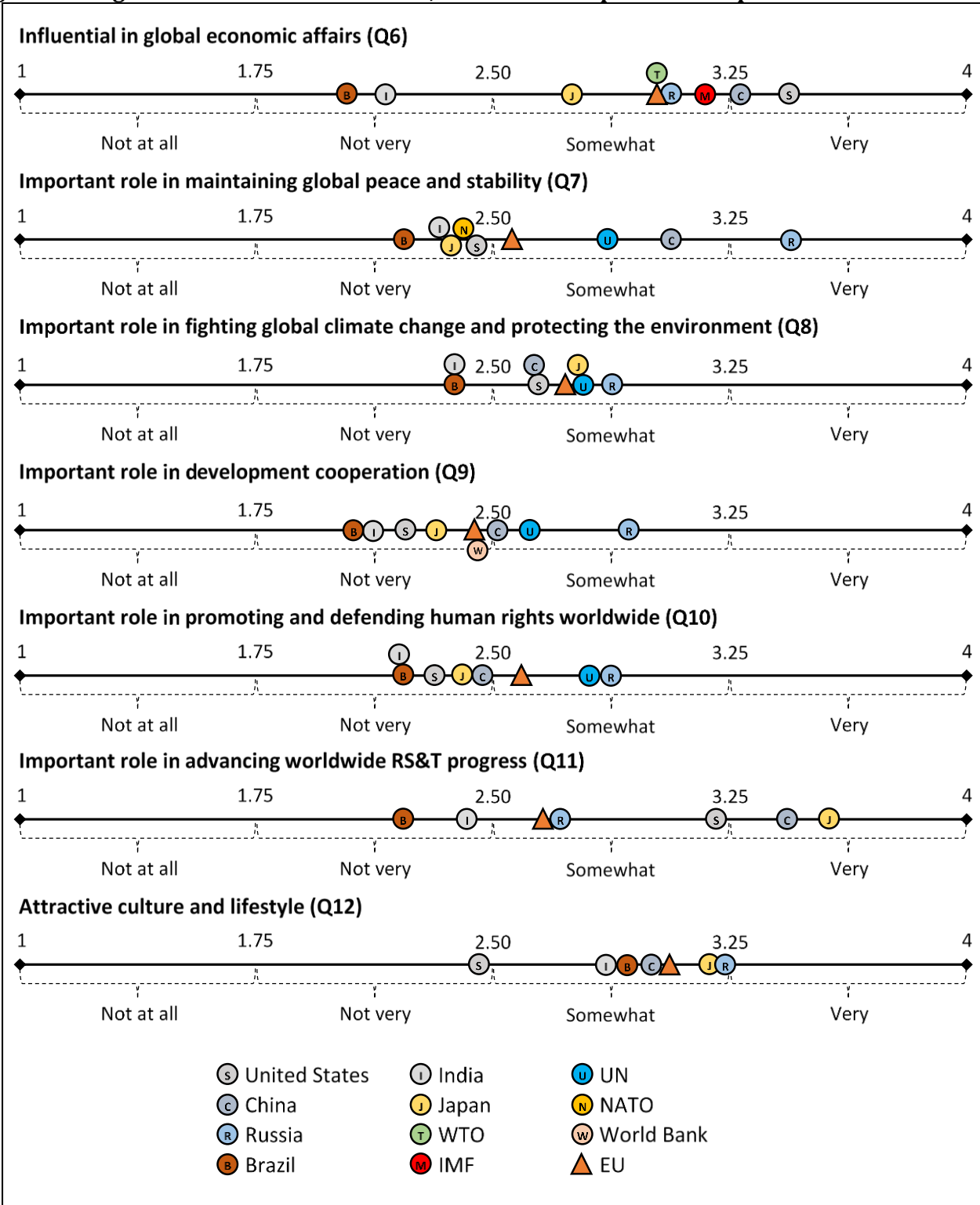
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, Russia's evaluations are again the most negative and least positive in comparison to the rest of the sample.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in Russia sees the EU as a somewhat influential, important and attractive international actor in most of the areas listed in Figure 10 except development cooperation. The Russian general public found the EU's role in development cooperation not very important. Looking comparatively at which areas the EU was seen as the most important, global economic affairs and upholding an attractive lifestyle stand over others. Furthermore, the EU is among the top 3 most important and attractive international actors only in the area of human rights and upholding an attractive lifestyle. In the remaining thematic areas the EU appears only among the top 4 or 5 most important international actors.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1321). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



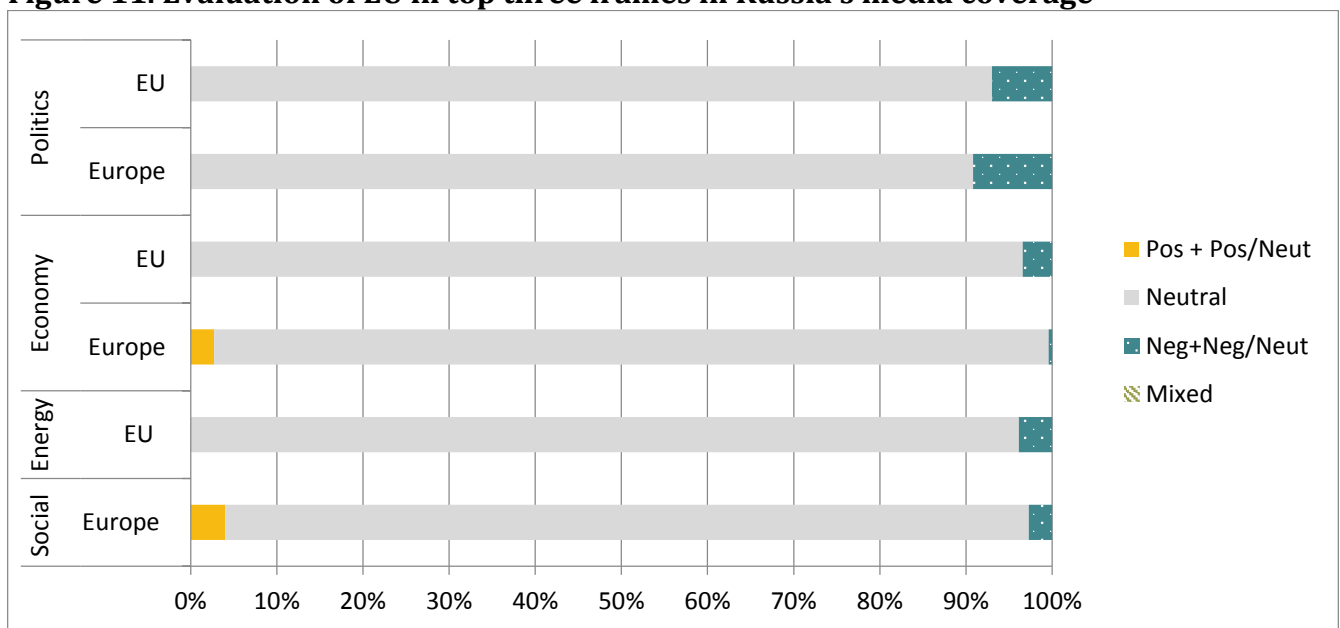
Compared to how influential other SP country publics find the EU in the areas listed in Figure 10, in Russia the EU is seen as less influential across the different areas except as concerns the attractiveness of EU culture and lifestyle. Russians also saw EU’s importance in advancing worldwide RS&T close to the 10-country average.

[\[→ comparative overview\]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in Russian media coverage: politics, economy and energy (EU) and social (Europe), evaluations of both the EU and Europe are mostly neutral, with slightly more negative evaluations than positive ones.

Figure 11. Evaluation of EU in top three frames in Russia’s media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the Kommersant, Russkaja Gazeta and the Vedomosti (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

Most common descriptors used by general population in association to EU

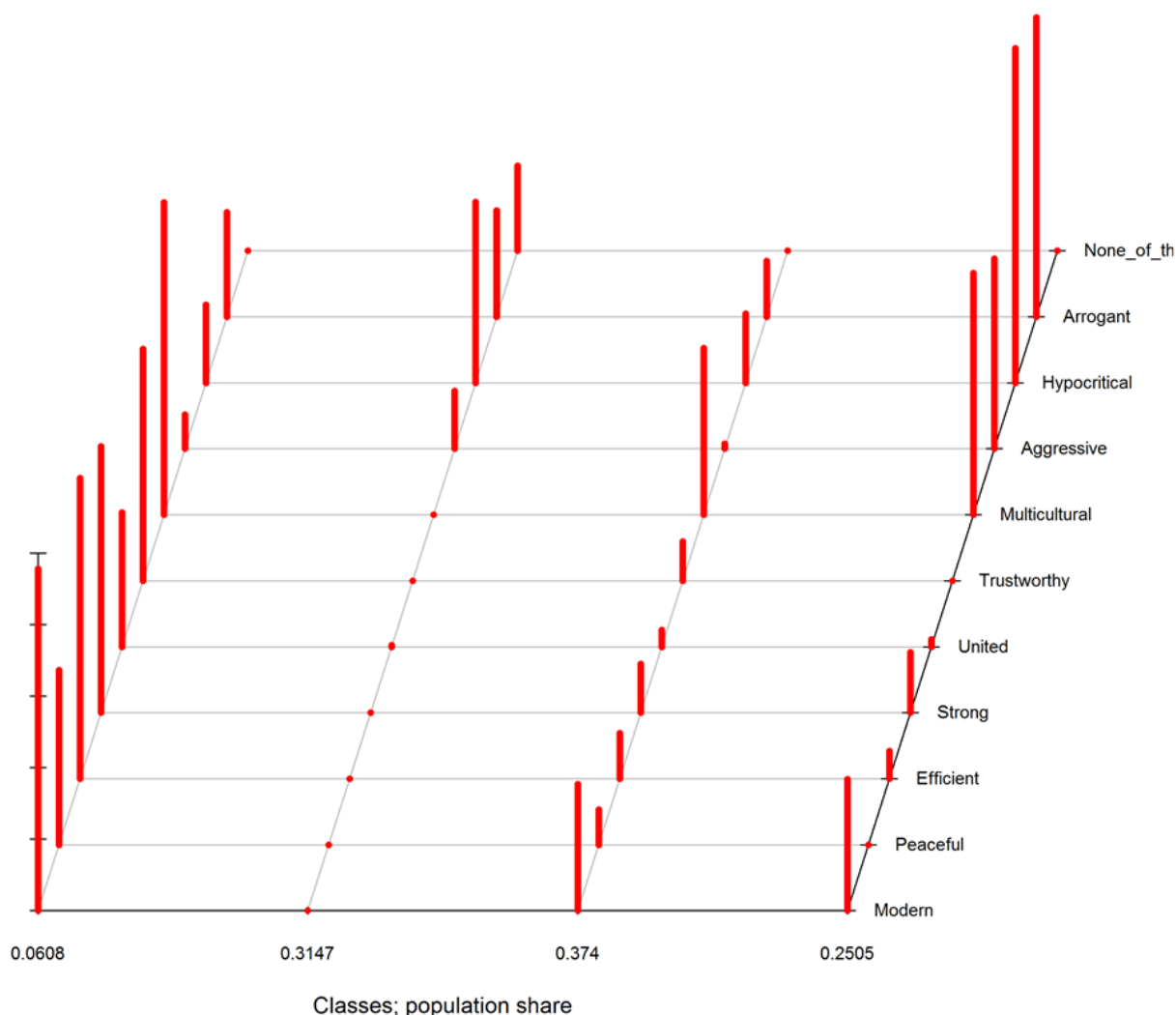
The general population in the US chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in Russia:

- Mixed, but mostly negative and few descriptors – 37% (top 3: hypocritical, multicultural, arrogant).
- Mixed, mostly positive and many descriptors– 6%.
- Only negative descriptors and no opinion – 31% (top 3: hypocritical, arrogant and aggressive).
- Mixed, mostly negative and many descriptors – 25%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it’s viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the classes that included mostly negative descriptors to describe the EU (the

37%, 25% and 31% classes, in the case of the latter multicultural was not used at all) compared to the height of this bar in the only mostly positive group – the 6% class.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1321) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



Russia's general population was the only compared to the rest of that of other SP countries to choose mostly negative descriptors of the EU.

While the most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful, in Russia the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview\]](#)

Effectiveness

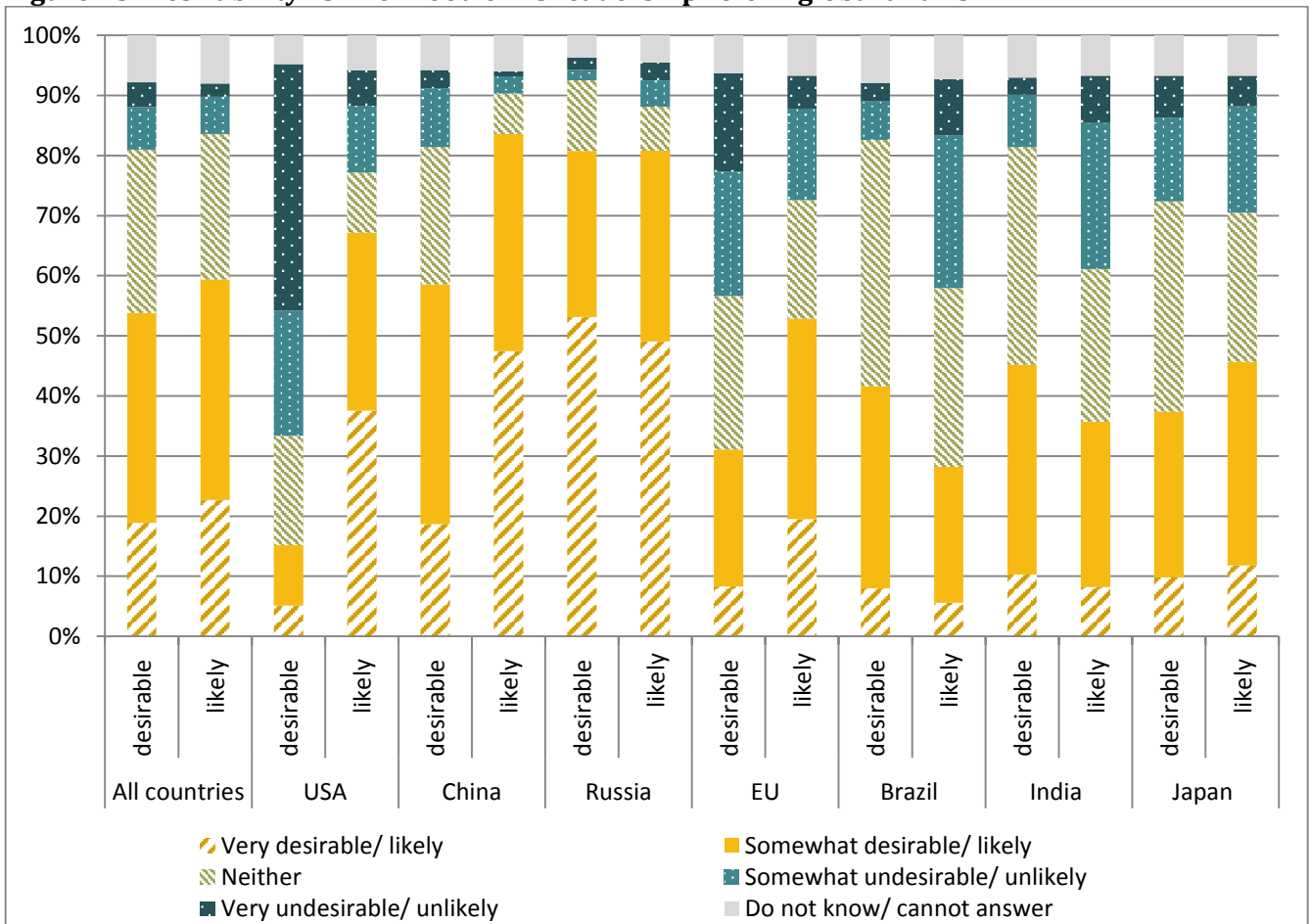
Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports

(Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the Russian general public finds EU global leadership as similarly desirable and undesirable, and also more likely than desirable. Looking at desirability of its leadership compared to a preselected list of countries, EU leadership is less undesirable only than that of the US. The likelihood of it assuming this role is seen as higher than that of Brazil, India and Japan, but behind that of China, Russia itself, and the US.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1321).

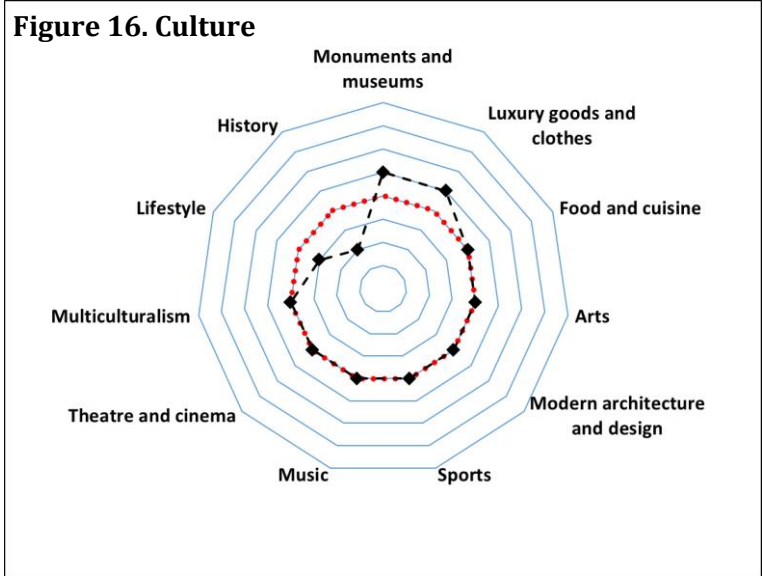


Compared to how desirable and likely other SP country populations find future EU global leadership, in this respect the Russian population found it least desirable, however more likely than did the populations in Japan and the US.

[\[→ comparative overview \]](#)

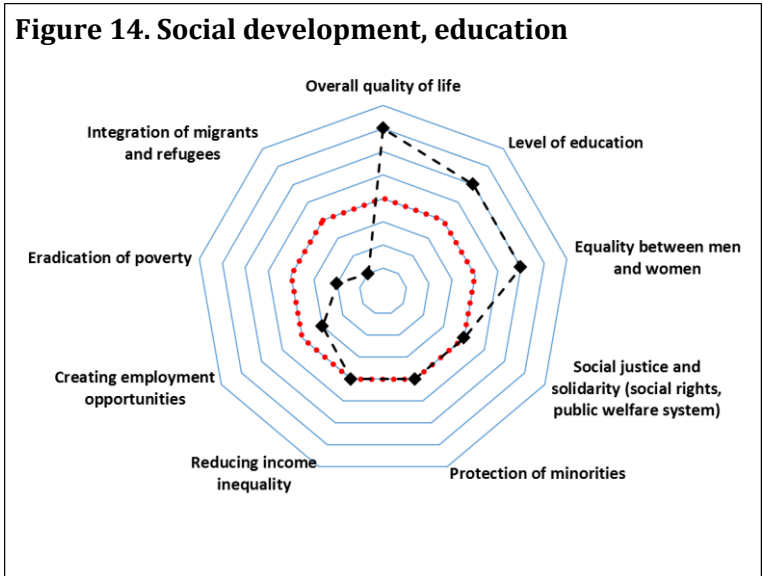
Culture

In the area of culture, the general public in Russia had the most positive views towards the EU's effectiveness in terms of its monuments and museums as well as luxury goods and clothes. On the contrary, history was least often viewed positively. Across the remaining fields, Russian respondents expressed relatively less positive views towards the EU lifestyle than any other field.



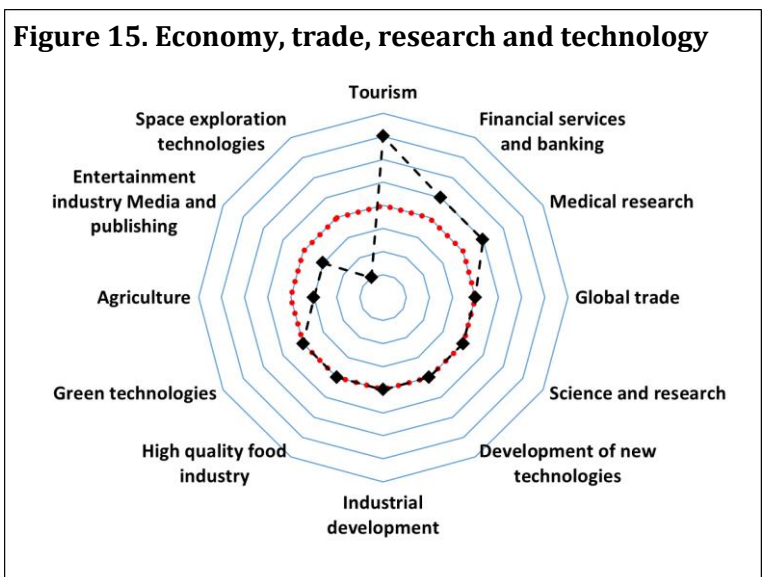
Social development and education

In the area of social development and education, respondents in Russia had the most positive views regarding EU's performance in terms of education, quality of life, and gender equality. They expressed least positive views in terms of integration of migrants and refugees, as well as eradication of poverty. Across the remaining fields, the general public in Russia found EU's performance in creation of employment opportunities relatively less positive than other fields.



Economy and RS&T

In the area of economy and RS&T, respondents in Russia were most positive about the EU's performance in the field of tourism and the least positive in space exploration technologies. Across the remaining fields, relatively more positive views were expressed in terms of EU's performance in financial services and banking, as well as medical research. Furthermore, relatively less positive views were expressed about EU's performance in the field of agriculture, as well as the entertainment industry, media and publishing.



Politics and security

In the area of politics and security, respondents in Russia were the most positive about the EU's performance in terms of ensuring media freedom and the rule of law, as well as protection of the environment. They expressed least positive views in terms of dealing with refugees and peacekeeping operations.

Figure 17. Politics and security

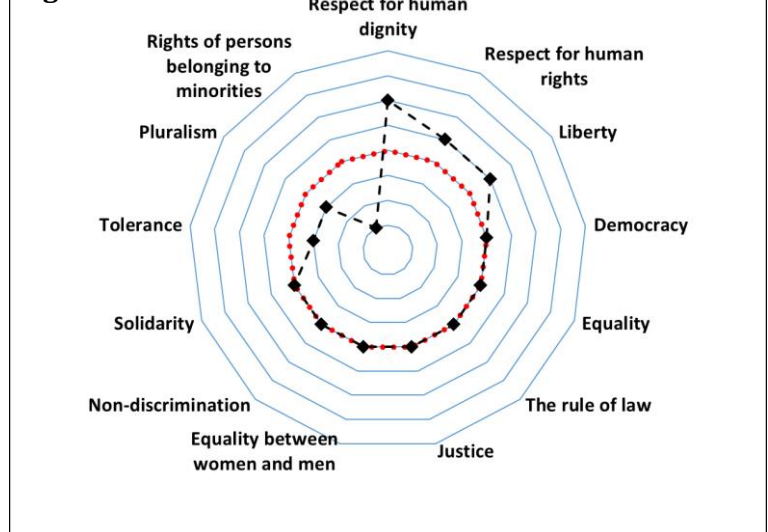


Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1321). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

In regards to normative area, respondents in Russia reported that their views are most similar to those of the EU on the issues related to respecting human dignity and least similar to minority rights. Across the remaining issues, they also found the EU's views on non-discrimination and minority rights slightly less similar to their personal views than other issues. In addition, they also found the issues related to liberty and respecting human rights slightly more similar to their personal views.

Figure 18. Normative



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1321). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age** and **gender** older respondents and women find the EU more attractive and influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress).

Higher **income** was linked to more positive views of the Russia-EU relationship and EU attractiveness. **Working status** did not feature among explanatory criteria in the Russian sample, however **education** did. Students and the less educated of the sample viewed the Russia-EU relationship more positively, and found the EU to be more influential across different thematic fields. Lastly, the **region of residence** accounted for some differences in perceptions – respondents from the Southern and North Caucasian Federal District found the EU to be more attractive.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that have had **contact with Europe** and have **insufficient information on the EU** and would like to learn more found the EU to be a more desirable and likely leader, and thought it more influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). Moreover, those that have contact with Europe also hold a more positive general view of the EU, the Russia-EU relationship and find the EU more attractive.

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	Russia-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↑	...	...	Women ↑
Age	Older ↑	...	...	Older ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	Willing to learn more ↑	Willing to learn more ↑	Willing to learn more ↑
Income	Higher income ↑	Higher income ↑	...	...	...
Level of education	Students, less educated ↑	...	...	...	Students, less educated ↑
Working status
Region	Southern/ North Caucasian Federal District ↑	...	...	...

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1321). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting Russian views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



11 SOUTH AFRICA



Executive Summary

In South Africa awareness of the EU compared to a list of preselected countries and organisations provided in the survey is below that of the countries, but above most other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is somewhat high – as many as 54% of respondents hear about it once a week or more often, with 6% saying they never hear about it. The main sources for getting info on the EU are TV, online media (including online versions of print media) and social media. Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural issues, while for Europe social and cultural issues were mentioned more often than politics.

The EU was among the most positively viewed countries and international organisations in South Africa. South Africa respondents find the EU as somewhat to very influential, important or attractive international actor in most thematic areas, it was among the top 3 global actors in all except the themes of global economic affairs, development cooperation and advancing worldwide Research, Science and Technology (RS&T). Most common descriptors for the EU among South Africa respondents were ‘strong’, ‘modern’ and ‘multicultural’. Concerning representations of the EU and Europe in the media, South Africa press evaluated the EU and Europe mostly neutral, with negative framing slightly more frequent than positive in the remainder of the articles. With media coverage in terms of the volume of EU activities being the lowest in South Africa among the Strategic Partner (SP) countries, EU is predominantly linked to specific events of public interest, such as the UK elections, the Greek debt and migration crises or the South Africa-US Agoa dispute. In Europe coverage, interactions with Russia, Africa and the ICC are mostly reported on.

As concerns desirability and likelihood of EU global leadership, comparing to how South Africans view preselected countries in this respect, the EU appears as desirable a leader as the US and outranks other countries, however as concerns the likelihood of it assuming this role, the EU is outranked by the US and China. Looking specifically at EU’s effectiveness within different fields, comparing different sub-fields of culture, the EU is best regarded for its monuments and museums as well as luxury goods and clothes, and relatively least so in terms of how the EU fares with multiculturalism. In different areas linked to social development and education, South Africa respondents had the most positive views of EU’s performance in terms of education and quality of life, and least positive on EU’s efforts in protection of minorities. In the area of economy and Research, Science and Technology (RS&T), the EU is seen as performing best in tourism and least so in space exploration technologies. Lastly, in politics and security, the EU’s performance is viewed most positively in terms of ensuring the rule of law and relatively least so in terms of dealing with refugees and displaced people.

[→ Full Country Chapter: Final Report Chapter 3.8 p.197]
[→ List of potential partners: Final Report Table 29: p.280]

SOUTH AFRICA



Context

South Africa became EU's Strategic Partner in 2007. Related key documents: Trade, Development and Co-operation Agreement (TDCA) (1999)

Trade relations governed by TDCA. Ongoing negotiations on reaching a comprehensive trade agreement with the whole Southern African Development Community (SADC), including Southern Africa.

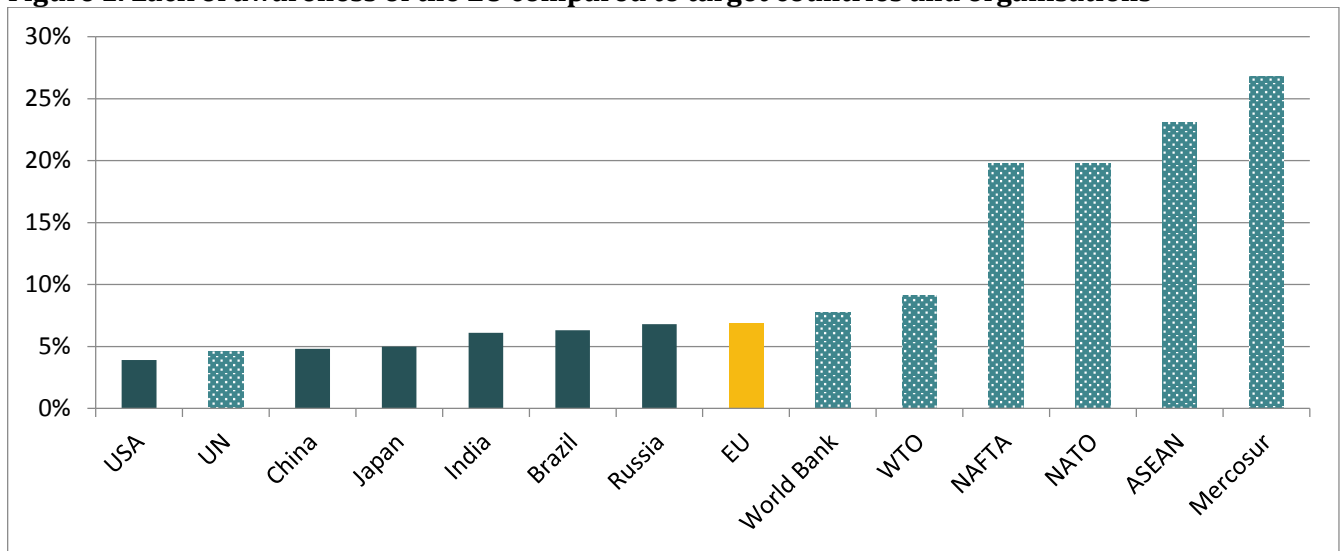
South Africa is largest EU trading partner in Africa. EU exports in goods: €23.3 bn, imports in goods: 18.4 bn (2014 data).

Visibility

Awareness of the EU in South Africa – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in South Africa awareness of the EU is below that of all the countries used for comparison. The South Africa general public, however, finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1169).

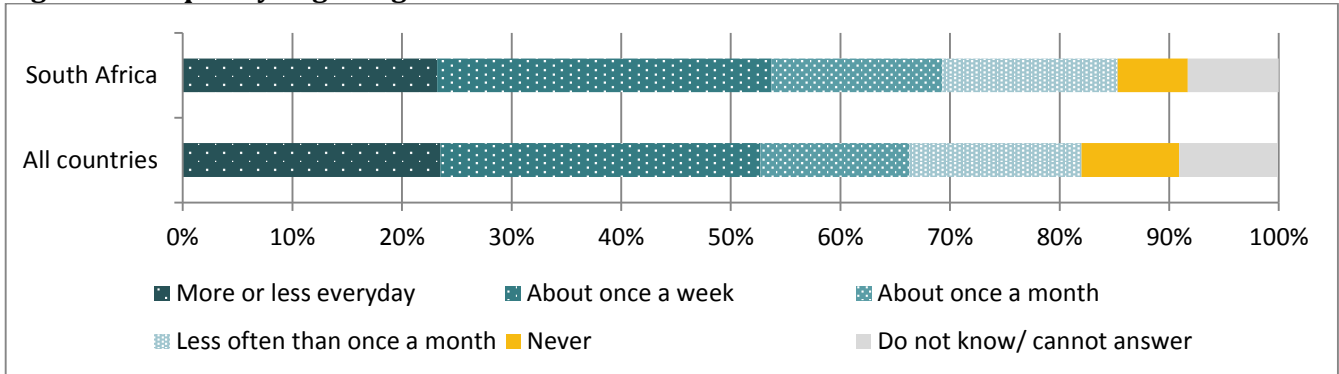


Compared to other countries, awareness of the EU in South Africa (7% unaware/ 93% aware) is close to the ten-country average, it surpasses that in Canada (15% unaware/ 85% aware), the US, Japan (both 14% unaware/ 86% aware) and India (9% unaware/ 91% aware).

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in the South Africa is moderate. Most South Africa respondents (31%) stated that such information would reach them about once a week. The other three largest respondent groups hear or read about the EU more or less everyday (23%), less often than once a month, or about once a month (both 16%). Meanwhile, the smallest group of South Africa respondents (6%) stated that they never hear or read about the EU.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1169).



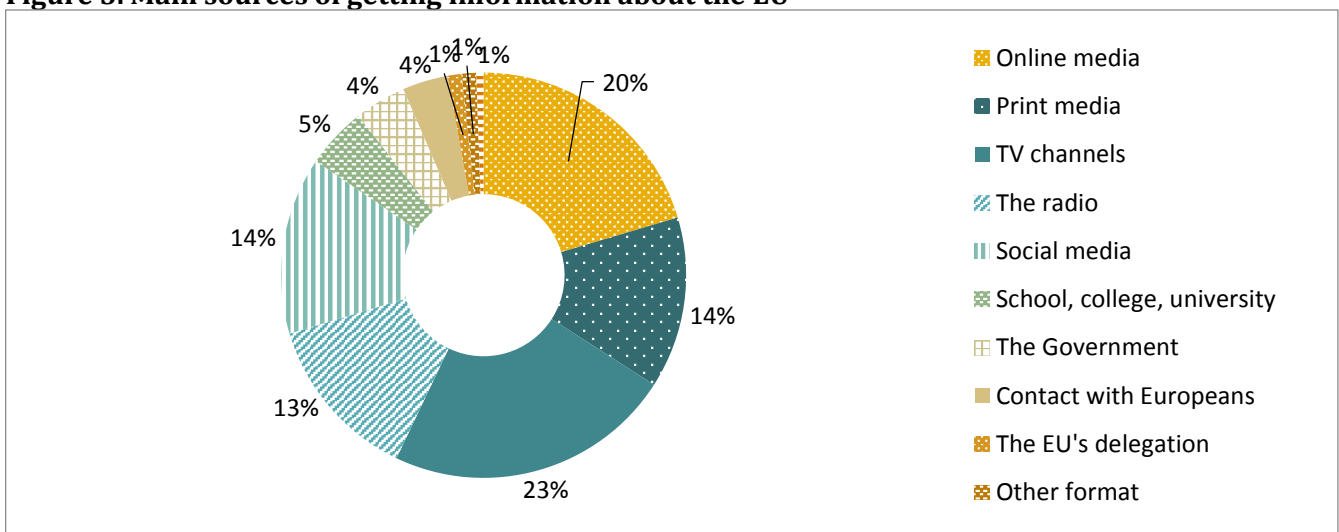
The frequency of hearing or reading about the EU in South Africa, as compared to results in other Strategic Partner countries, is relatively moderate, and doesn't stand out among the sample.

[→ [comparative overview](#)]

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in South Africa are TV channels (23%), online media (20%) and social media (14%) with print media just behind (proportionally 14% as well).

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 998).



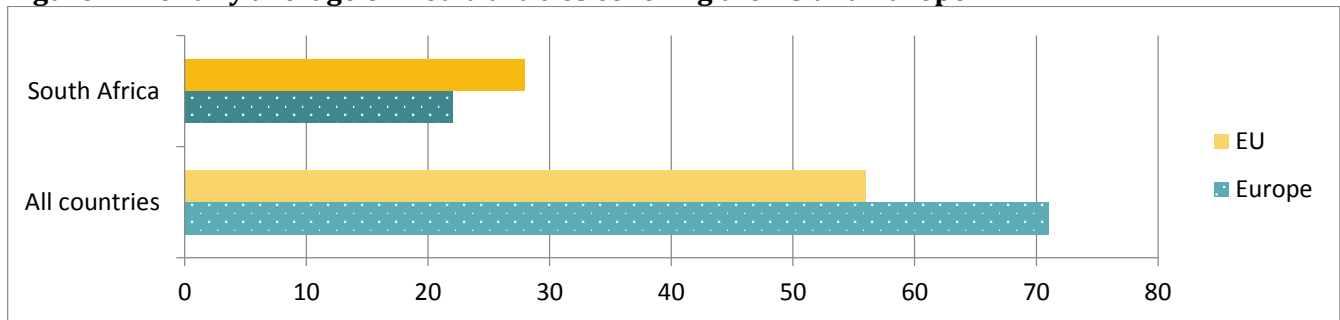
Compared to the other 9 SP countries, South Africa respondents marked the same sequence of most popular media sources (TV channels, online media and social media) as those in Russia and Brazil.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected South Africa popular and business print media outlets mention the EU (monthly average – 28 articles) more frequently than Europe (22).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The Times, The Star and The Business Day (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, South Africa is the country with the least articles covering both the EU and Europe. Also, contrary to the tendency across the SP countries, where Europe is covered more frequently (71) than the EU (56), in South Africa there were more articles mentioning the EU.

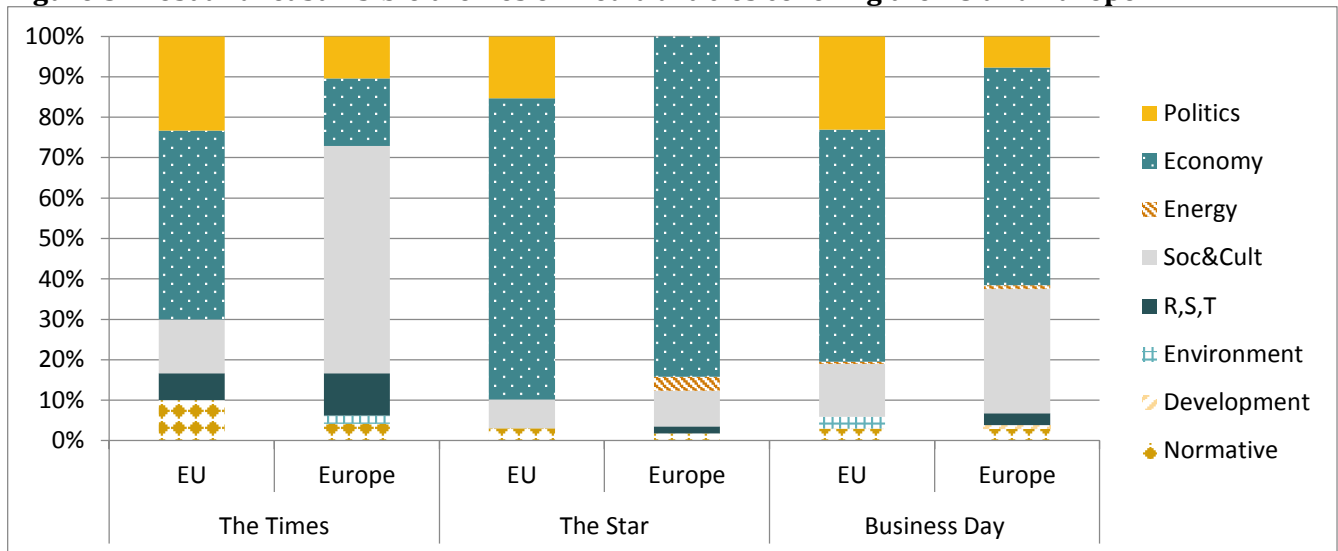
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of South Africa media coverage of the EU concerns the economy (61 articles/month), and, to a lesser extent, politics (20) and social and cultural issues (11), with other topics getting little media coverage (6). In economic news related to the EU, trade was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on EU-Russia relations. Finally, social and cultural news, the third most popular frame in EU-related news in South Africa, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were development, energy and RS&T.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in the articles covering the EU. Also, the Europe dataset mentions RS&T more often than that of the EU. This partly coincides with the results of the survey: in South Africa, respondents associated such areas as economy and politics first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in the The Times, The Star and The Business Day (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Media analysis results in South Africa show very similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for South Africa respondents the most attractive EU Member States are France, Italy and Germany. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and the UK (related to Brexit).
- Meanwhile the results concerning institutions show a similar tendency both for the survey and media analysis of the EU dataset, showing ECB in the first place (among other institutions), probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by the media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in the The Times, The Star and The Business Day during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European

countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1169).



In this case tendencies in South Africa are similar to those of the other Strategic Partner countries – the dominant actors being linked to Brexit, Brexit and the state of the economy in the EU during the media monitoring period.

[\[→ comparative overview \]](#)

Actorness

Overall evaluation of the EU among the general public

From the point of view of the South Africa general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU appears below the US (which, on the other hand, also had a higher proportion of negative views than the EU) and similarly to Japan, and in the case of the latter – it outranked all organizations except the UN. A total of 53% of US respondents viewed the EU positively, compared to 12% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1169).



Looking at how the EU is evaluated in South Africa as compared to in the other Strategic Partner countries, the results do not stand out – as in all countries except Russia, South Africa respondents evaluated the EU more positively than negatively. In terms of negative evaluations, South African respondents were second after Russia in the percentage of people that reported having negative views.

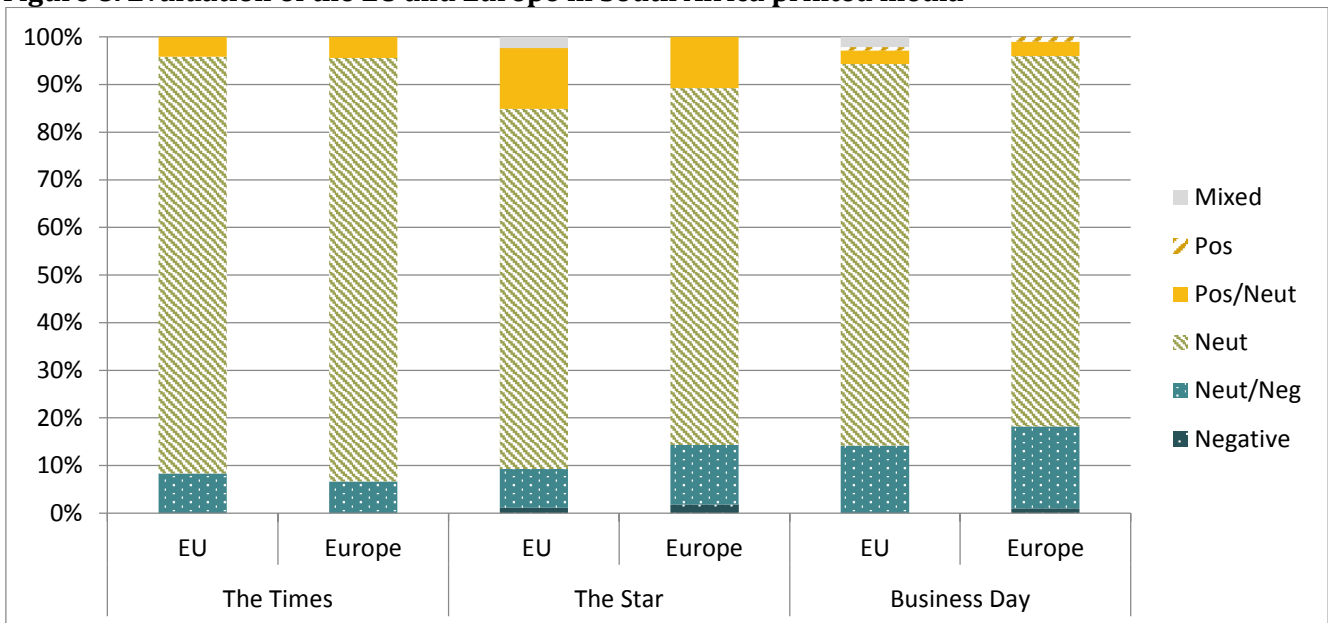
[\[→ comparative overview \]](#)

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, South Africa newspapers evaluated it somewhat more negatively than positively – some 6% of articles had the EU framed positively as opposed to 12% where it was framed negatively, however the majority of coverage was neutral (Figure 8). Europe coverage did not differ much from that of the EU – some 6% of Europe articles were framed positively versus 15% where Europe was evaluated in a negative light.

With media coverage in terms of the volume of EU activities being the lowest among the Strategic Partner (SP) countries, EU visibility in South Africa is predominantly linked to specific events of public interest, such as the UK elections, the Greek debt and **migration** crises or the South Africa-US Agoa dispute.

Figure 8. Evaluation of the EU and Europe in South Africa printed media

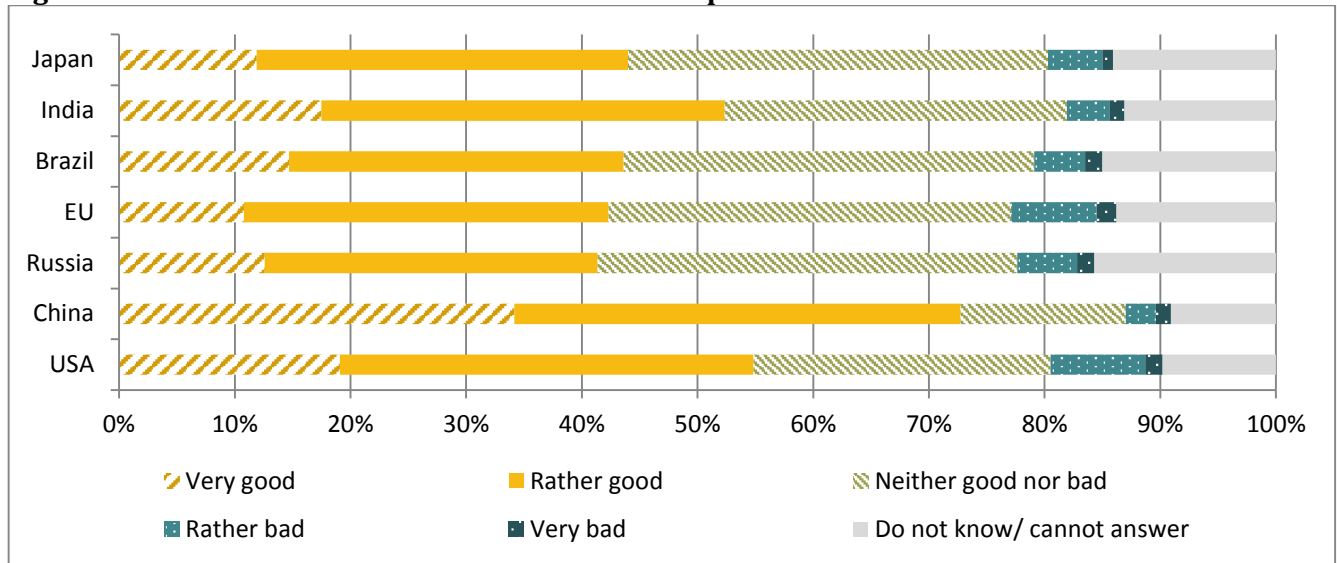


Note: Based on observation of news articles mentioning the EU and Europe in the The Times, The Star and The Business Day (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU's relationship with South Africa

According to the public opinion poll, the South Africa general population views their country's relationship with the EU to be mostly good, however behind that of all countries used for comparison except for Russia, which fared similarly to the EU. Some 42% of respondents view it as good, compared to 9% that view it negatively (Figure 9). Interestingly, respondents gauged South Africa's relationship with the EU less positively than they saw the EU itself (Figure 7), showing that the EU is seen well, but less so in relation to South Africa.

Figure 9. Evaluation of the South Africa's relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1169).



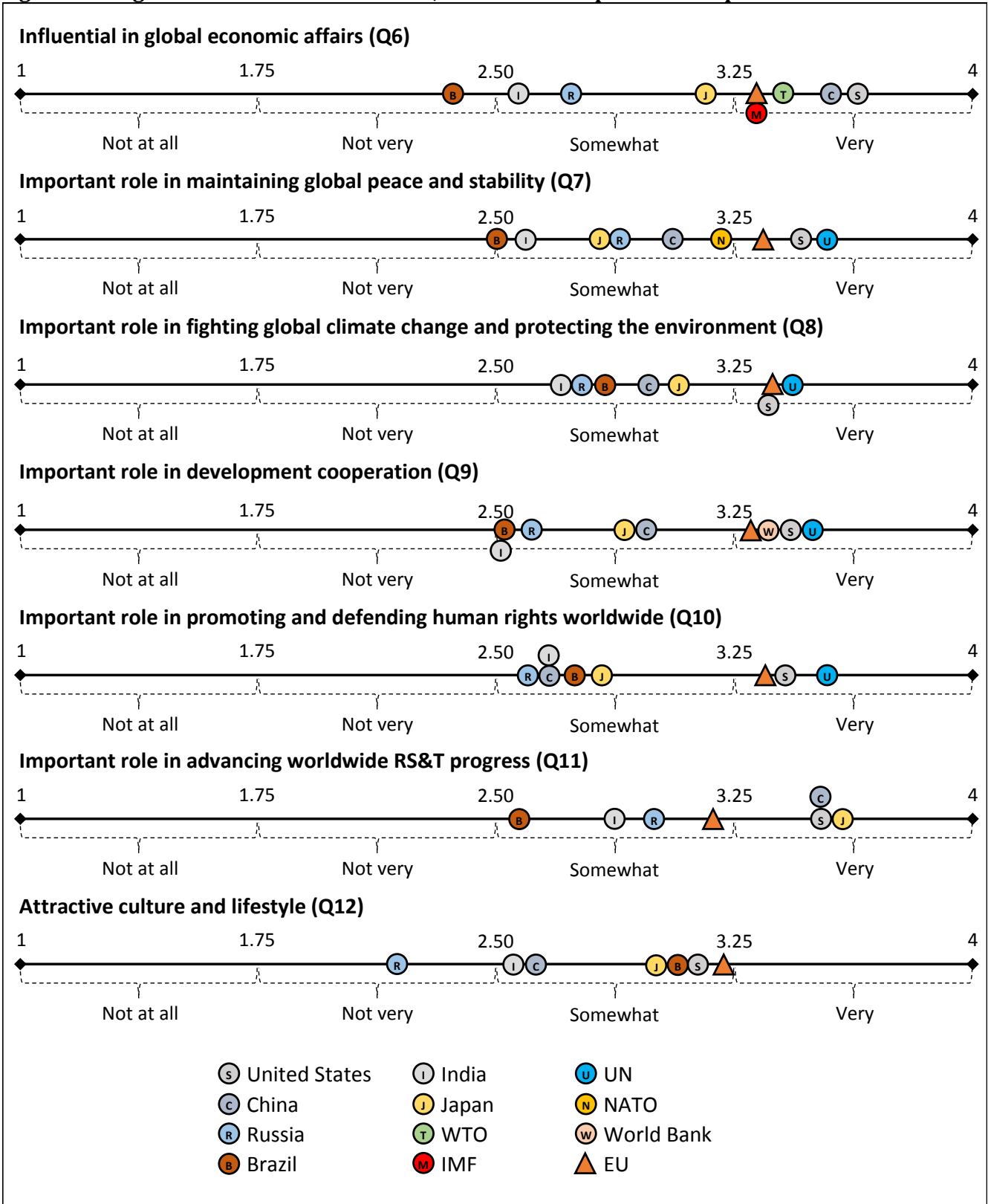
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, the South Africa doesn't stand out, and the extent of positive and negative evaluations is close, albeit slightly less positive, compared to the 10-country average.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in South Africa sees the EU as a somewhat to very influential, important and attractive international actor across the areas listed in Figure 10. Looking comparatively in which areas the EU was seen as more important, global economic affairs, maintaining global peace, protecting the environment, development cooperation, and defending human rights stand over others. The EU is among the top 3 most influential, important and attractive international actors in all of the selected thematic areas except global economic affairs, development cooperation and advancing worldwide RS&T. In the latter areas, the EU appears among the top 4 most important international actors. Notably, the general public in South Africa found the EU's culture and lifestyle more attractive than those of other countries used for comparison.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1169). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing

countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



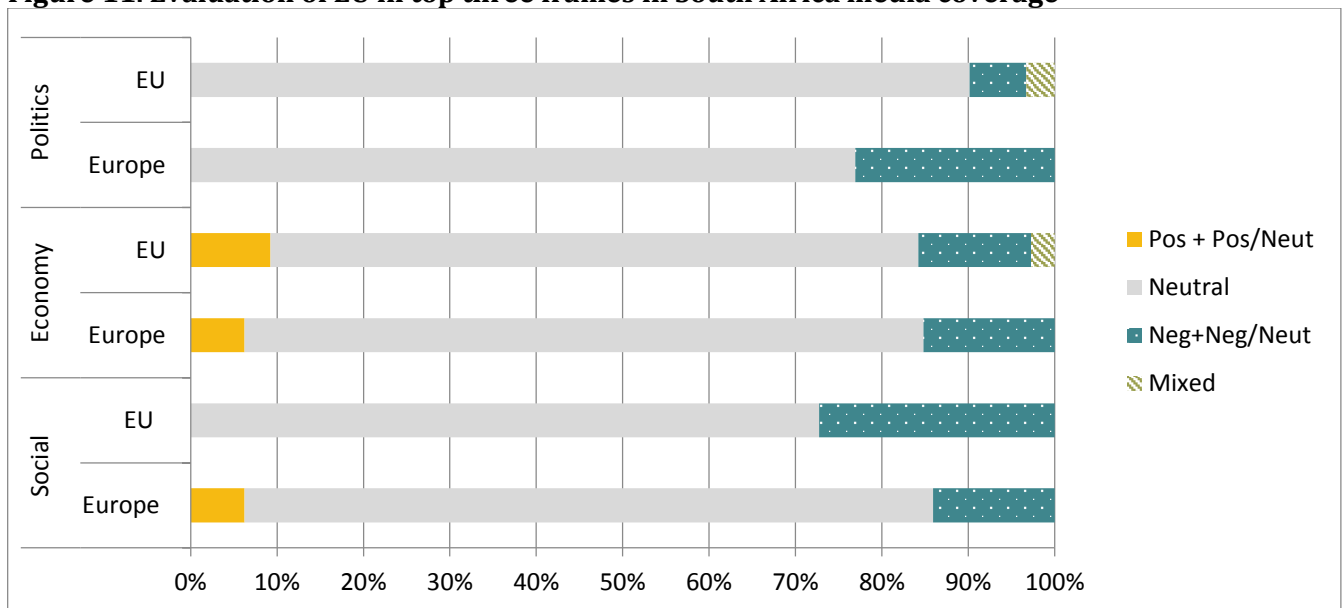
Looking comparatively at how important SP country populations find the EU across themes listed in Figure 10, in South Africa it is seen as relatively more influential in global economic affairs, fighting climate change, and defending human rights, and also most influential in terms of development cooperation.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in South African media coverage: politics, economy and social, the extent of positive and negative evaluations was similar, but differed across themes – Europe was more negatively evaluated in the political frame, whereas the EU was more often presented negatively in the social frame.

Figure 11. Evaluation of EU in top three frames in South Africa media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the The Times, The Star and The Business Day (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

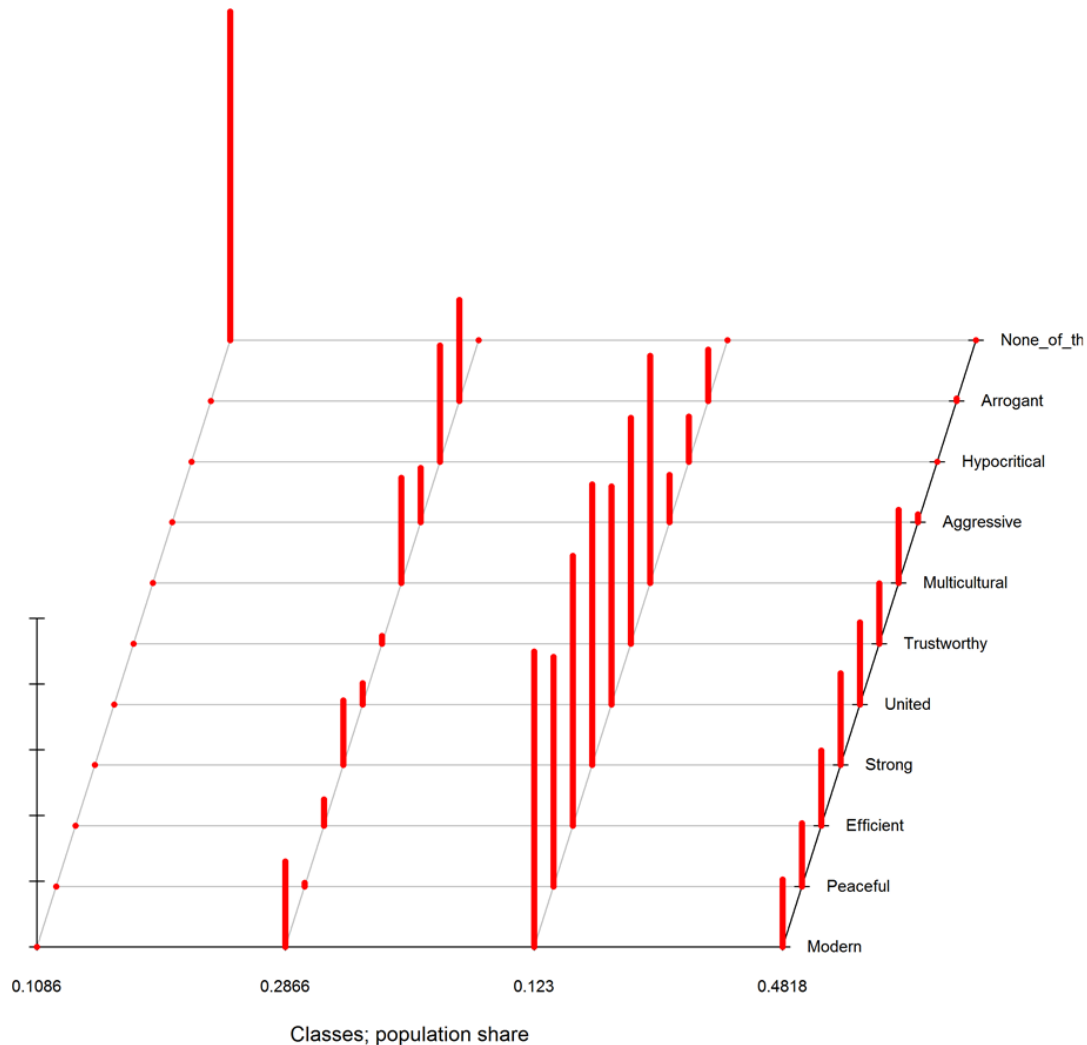
Most common descriptors used by general population in association to EU

The general population in South Africa chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in South Africa:

- Only positive and few descriptors – 48% (top 3: strong, modern, multicultural).
- Mixed, but mostly positive and many descriptors – 12%.
- Mixed, but mostly negative – 29% (top 3: hypocritical, arrogant and multicultural).
- No opinion on the EU and its descriptors – 11%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the two classes that used only (48%) or mostly (12% class) positive descriptors compared to that of the 28% class, which used mostly negative descriptors in association with the EU.

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1169) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all 10 SP countries except in Russia, the general population in South Africa chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, South Africa's results do not stand out, only in the rather sizeable class (29%) of the sample that chose mostly negative descriptors. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

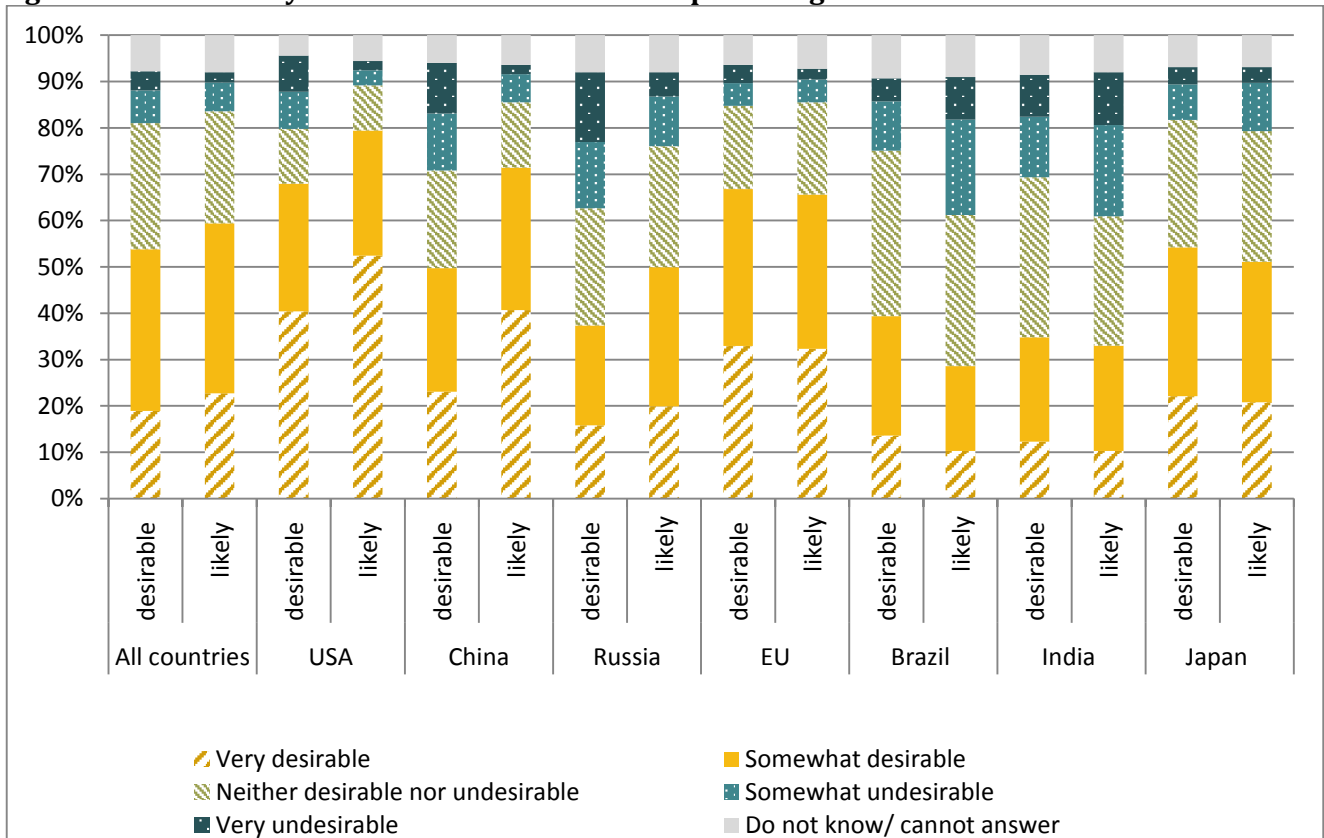
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public finds EU global leadership both desirable and likely. Looking at desirability of its leadership, the EU appears as desirable a leader as the US, and outranks other countries used for comparison. However, South Africans see the likelihood of the EU assuming this role as less likely, in this respect it is outranked by the US, and China.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1169)

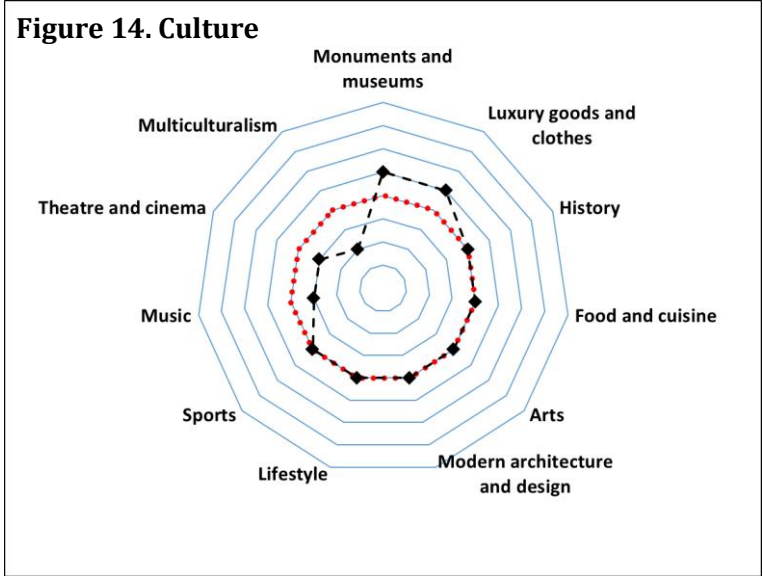


Looking comparatively at how desirable and likely SP country populations find future EU global leadership, in South Africa the EU is seen as most desirable compared to the other countries, and very likely to become a global leader, in this respect it is behind only Mexico.

[\[→ comparative overview \]](#)

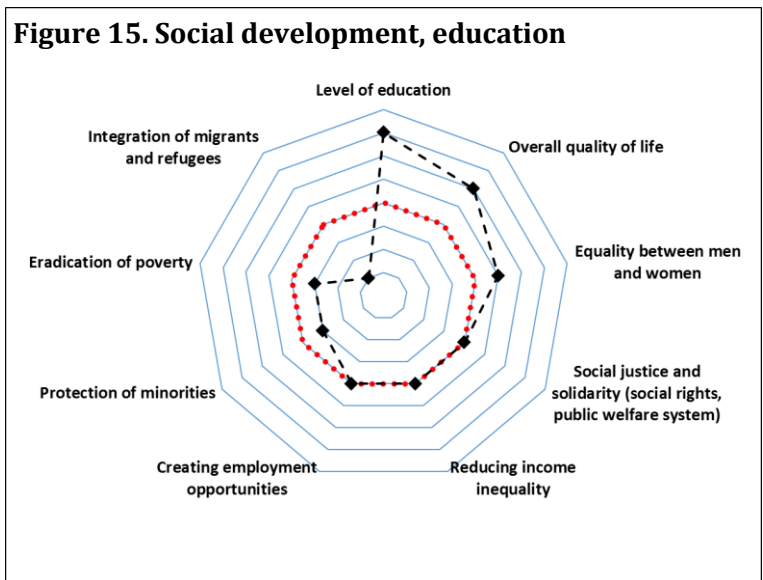
Culture

In the area of culture, the general public in South Africa had the most positive views towards the EU’s effectiveness in terms of monuments and museums, as well as luxury goods and clothes. In contrast, they expressed least positive views in terms of how EU fares with multiculturalism. Across the remaining fields, respondents in South Africa expressed relatively less positive views about music, as well as theatre and cinema than towards any other field.



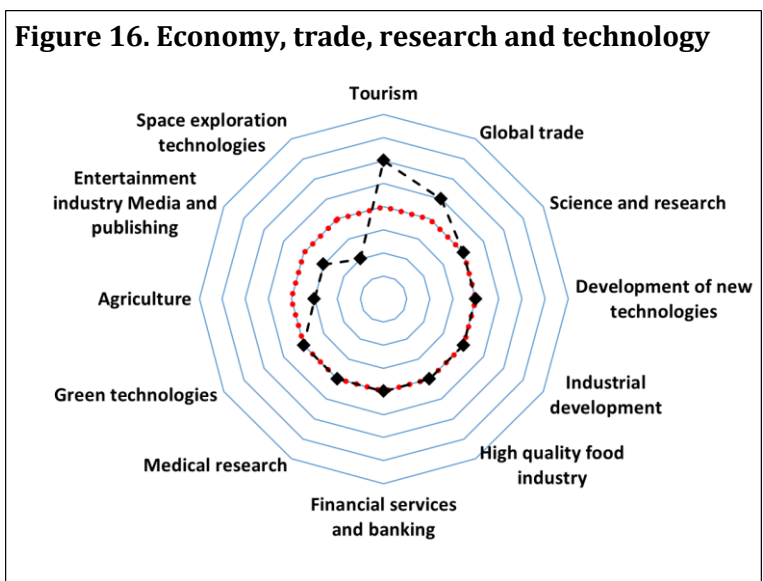
Social development and education

In the area of social development and education, respondents in South Africa had the most positive views regarding EU’s performance in terms of education and quality of life. They expressed least positive views towards EU’s efforts in protection of minorities. Across the remaining fields, South Africans were relatively more positive about EU’s performance in ensuring gender equality and relatively less positive about how it fares in eradication of poverty and protection of minorities.



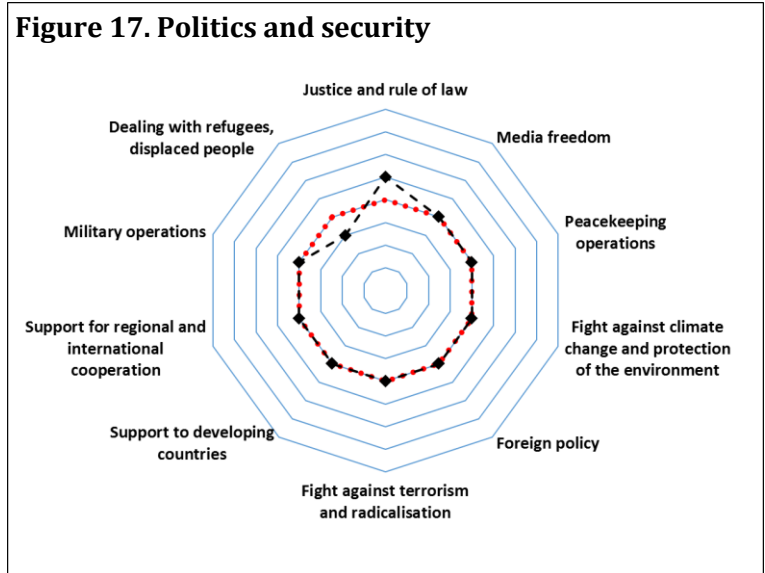
Economy and RS&T

In the area of economy and RS&T, respondents in South Africa were most positive about the EU’s performance in the field of tourism and the least positive about how it fares in space exploration technologies. Across the remaining fields, South Africans were relatively more positive about EU’s performance in global trade and relatively less towards agriculture, as well as the entertainment industry, media and publishing.



Politics and security

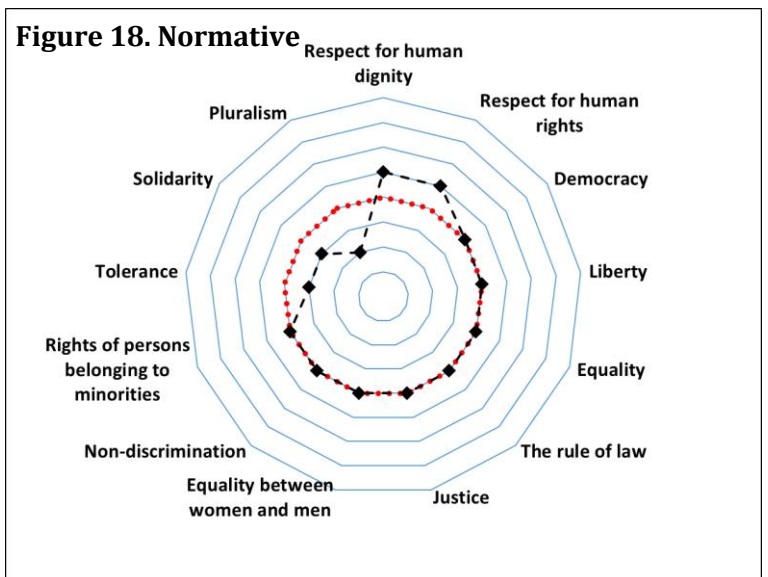
In the area of politics and security, respondents in South Africa were most positive about EU's performance in terms of ensuring the rule of law and least positive in terms of how the EU is dealing with refugees and displaced people.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N=1169). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

With regards to the normative topics, respondents in South Africa reported that their views are most similar to those of the EU on issues related to respecting human rights and dignity. In contrast, they found EU's views on pluralism least similar to those of their own. Across the remaining areas, slightly less respondents found similarity in their personal point of view with that of the EU's in terms of solidarity and tolerance.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N=1169). Each ring represents an approximately ± 5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, younger respondents have a more positive general view of the EU and that of the South Africa-EU relationship. In terms of **gender**, women in South Africa reported to be less aware of the EU and had a less positive general view of the bloc as well as its relationship with South Africa.

Respondents with higher **income** were more likely to find the EU attractive. However, neither **working status**, level of **education**, nor **region of residence** featured among explanatory criteria.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. South Africans that felt more **sufficiently informed** about the EU were more likely to be positive about the South Africa-EU relationship. Those that have had **contact with Europe**, were more positive about the EU generally and found it to be more influential across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). This group was also more positive about the South Africa-EU relationship and found the EU a more desirable and likely global leader.

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	South Africa-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	Women ↓	Women ↓	...	...	...	...
Age	...	Younger ↑	Younger ↑	...	...	...	Younger ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	More informed ↑	...	...	...	...
Income	Higher income ↑	...	...	...
Level of education
Working status
Region

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N=1169). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting South African views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



12 SOUTH KOREA



Executive Summary

In South Korea awareness of the EU compared to a list of preselected countries and organisations provided in the survey was above that of most of the countries, behind only the US and China, and above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about it is rather moderate – 37% of the South Korean respondents stated that such information would reach them about once a week, while another 34% hear or read about the EU once a month or more often, with 7% reporting that they never hear about it. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in EU news in print media used for analysis are economy, politics and social and cultural, whereas in Europe coverage social and cultural issues are mentioned more often than politics.

The EU was among the most positively viewed countries and multilateral organisations in South Korea. South Korean respondents find the EU among the top 3 most influential, important or attractive international actors in all areas except global economic affairs. Most common descriptors for the EU among South Korea's respondents were 'modern', 'peaceful' and 'multicultural'. As regards representations of the EU in the media, South Korea newspapers evaluated it mostly neutrally, but in the remainder of the articles negative framing was more common than positive for EU news. As concerns more specifically EU news, in the politics frame the chosen outlets were more inclined to cover internal issues of the EU, such as the UK election, than external ones. In the economy frame, the state of economy, business/finance and trade issues were dominant - more specifically, the Greek economic crisis, the ECB's quantitative easing and trade between the EU and South Korea. In the social affairs frame, migration in relation to the refugee crisis ranked first, followed by health care and social legislation, specifically welfare laws.

As concerns desirability and likelihood of EU global leadership, the South Korean public ranks the EU only behind the US in terms of how desirable its leadership would be, however places it behind China as well concerning the likelihood of it assuming this role. Looking specifically at EU's effectiveness within different fields, comparing how it fares in different sub-fields of culture, the EU is best regarded for its monuments and museums, as well as arts, and relatively least so for multiculturalism. In different areas linked to social development and education, the EU is seen best for education, quality of life and gender equality, and least positively for integration of migrants and refugees. In economy and Research, Science and Technology (RS&T), the EU is best regarded for tourism and relatively least so for space exploration technologies and the entertainment industry, media and publishing. As regards politics and security, South Korea respondents were most positive about the EU's performance in terms of foreign policy, peacekeeping operations and ensuring media freedom, and least so about its efforts in dealing with refugees and displaced people.

[\[→ Full Country Chapter: Final Report Chapter 3.9 p.219\]](#)
[\[→ List of potential partners: Final Report Table 30: p.282\]](#)

SOUTH KOREA



Context

South Korea became EU's Strategic Partner in 2010. Related key documents: Joint Political Declaration (1997) and Framework Agreement for Trade and Cooperation: (2001).

FTA agreement entered into force in 2011.

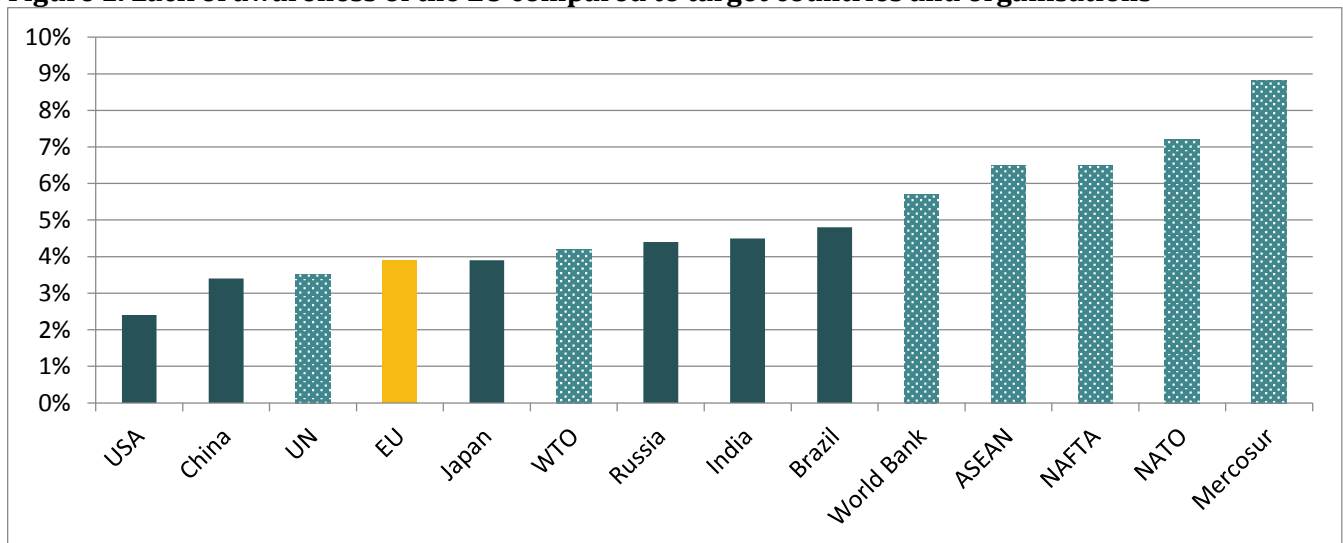
The EU is South Korea's fourth largest export destination (after China, Japan and the US). In 2014, EU exports of goods amounted to €43.1 bn, whereas imports amounted to €39 bn.

Visibility

Awareness of the EU in South Korea – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in South Korea awareness of the EU is above that of most of the countries used for comparison (lagging behind only the US and China). The South Korea general public also finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1238).



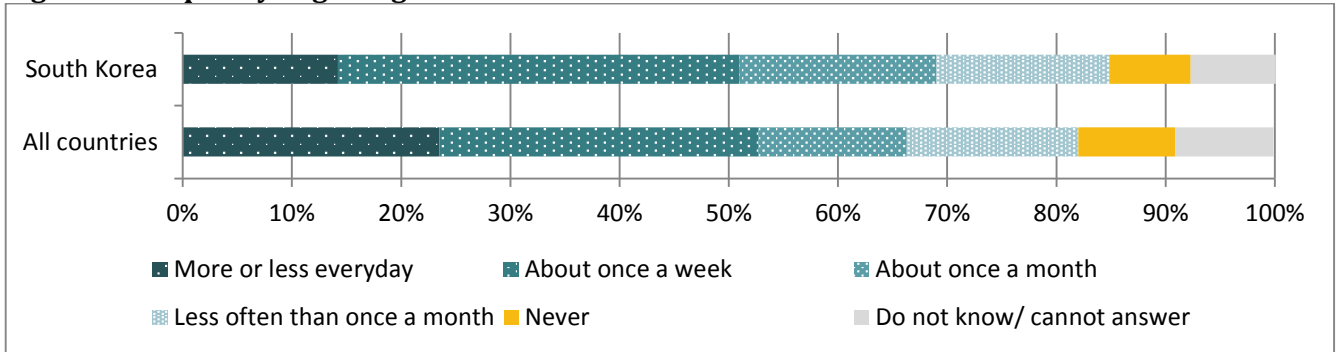
Compared to other countries, awareness of the EU in South Korea (4% unaware/ 96% aware) is the relatively high, together with the ones of Mexico, Russia (both 4% unaware/ 96% aware) and China (3% unaware/ 97% aware).

[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in South Korea is relatively moderate. Most South Korea respondents (37%) stated that such information would reach them about once a week. The other two largest respondent groups hear or read about the EU about once (18%) or less often than once a month (16%). Meanwhile, the smallest group of Korea respondents (7%) stated that they never hear or read about the EU. A relatively low share of respondents stated that they hear or read about the EU more or less everyday (14%).

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1238).



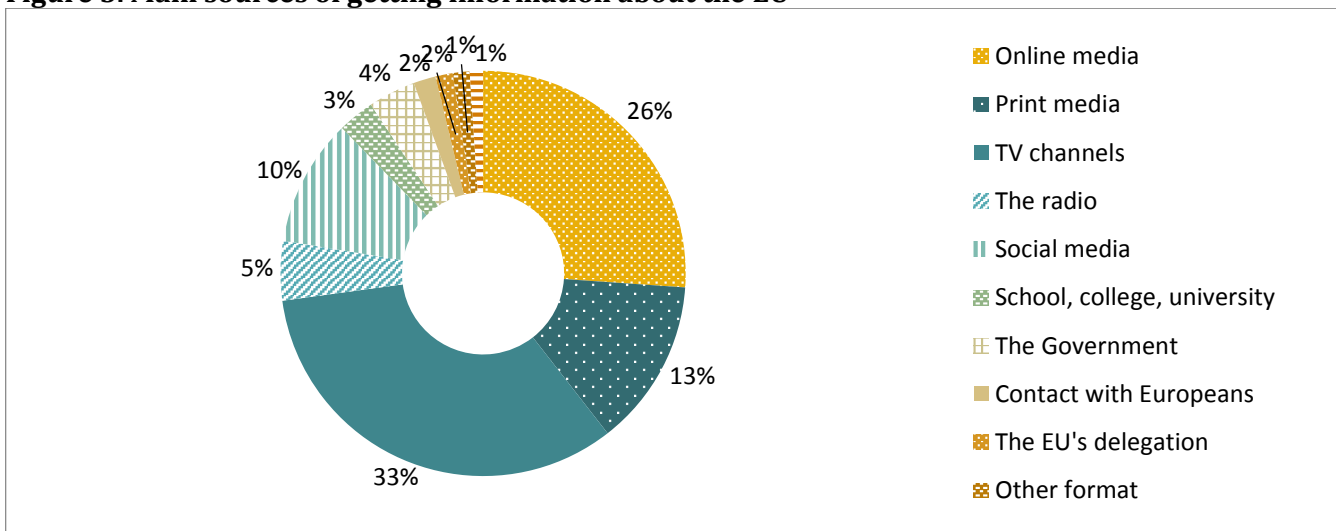
The frequency of hearing or reading about the EU in South Korea, as compared to results in other Strategic Partner countries, is relatively moderate. The share of Korean respondents who stated that information about the EU would never reach or would reach them more or less everyday are one of the lowest compared to results in other SP countries.

[\[→ comparative overview\]](#)

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in South Korea are TV channels (33%), online media (26%) and print media (13%). Meanwhile, social media (10%) in comparison proved a somewhat less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 1060).



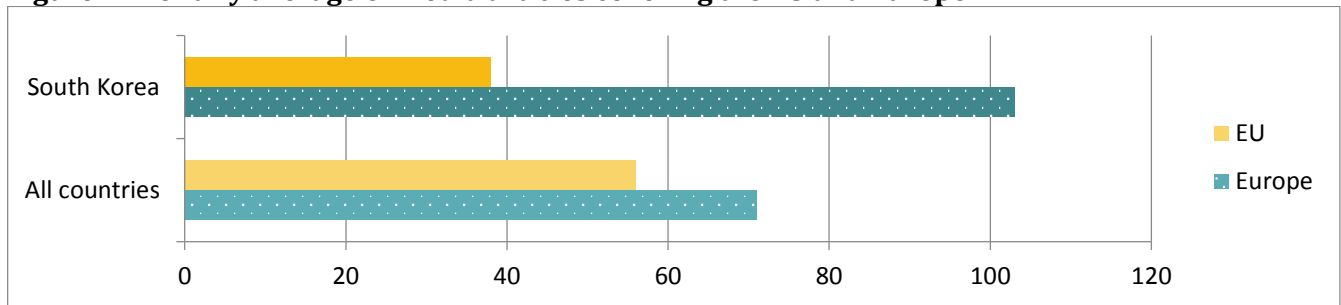
Compared to the other 9 SP countries, South Korea respondents marked the same sequence of most popular media sources (TV channels, online media and print media) as those in the US, Japan and Canada.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected South Korea popular and business print media outlets mention the Europe (monthly average – 103 articles) more frequently than the EU (38).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in Chosun Daily, Joongang Daily and Maeil Kyungje Shinmun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, South Korea is among countries with the most articles covering Europe and among the ones with the least articles mentioning the EU. This coincides with the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

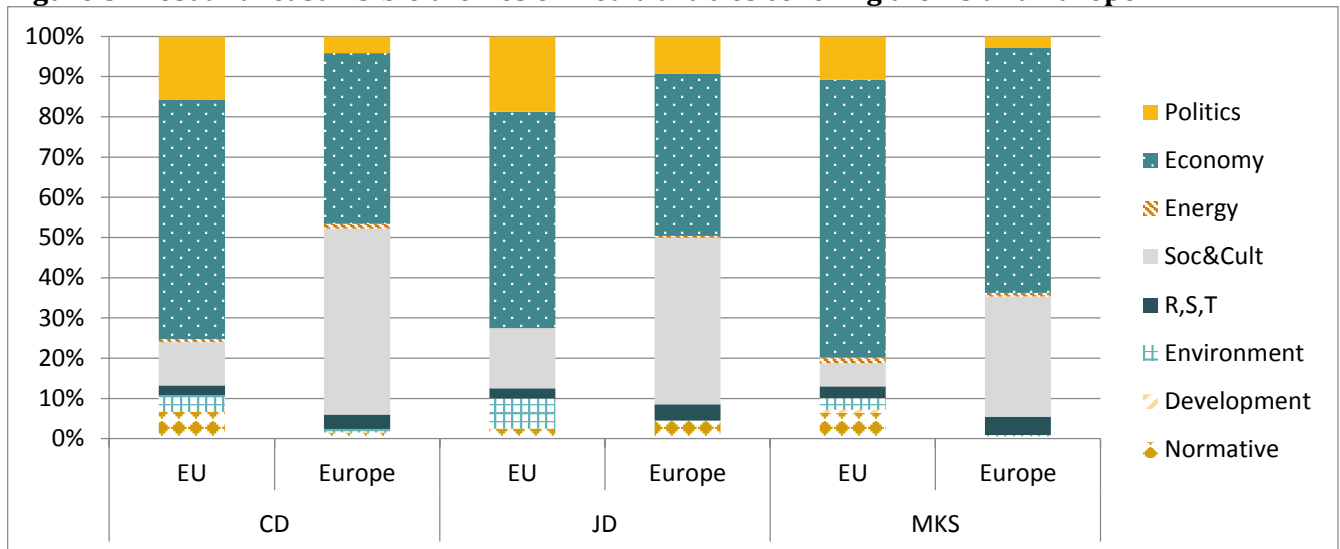
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of South Korea media coverage of the EU concerns economy (70 articles/month) and, to a lesser extent, politics (16) and social and cultural issues (11), with other topics getting little media coverage (16). In economic news related to the EU, the state of the economy was the dominant subtheme. In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on Ukraine and EU Russia sanctions. Finally, social and cultural news, the third most popular frame in EU-related news in South Korea, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were development, energy and RS&T.

Concerning the proportion of the most visible themes related to Europe, though in this case economy is still the most visible theme, social and cultural issues are mentioned more often than politics, unlike in articles covering the EU. However, other themes (normative and environment), with the exception of RS&T, are covered less often than in articles mentioning the EU. This partly coincides with the results of the survey: in South Korea, respondents associated areas as economy and politics are first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in Chosun Daily (CD), Joongang Daily (JD) and Maeil Kyungje Shinmun (MKS) (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



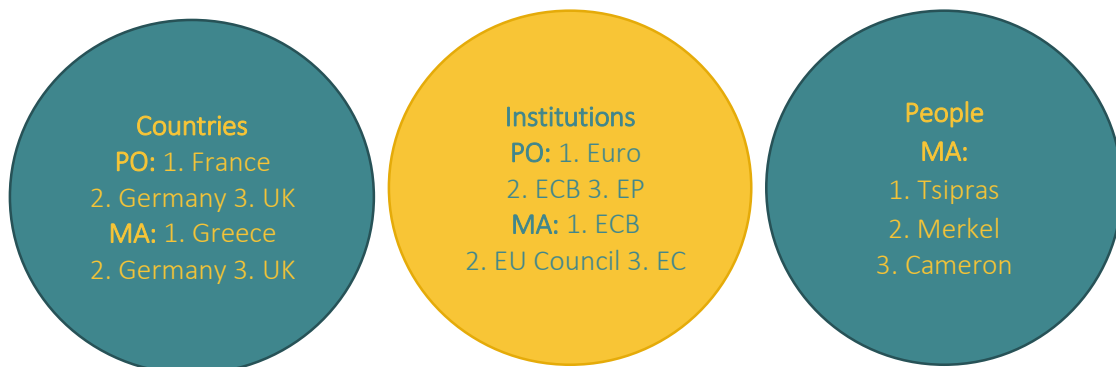
Media analysis results in South Korea show similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering).

[\[→ comparative overview \]](#)

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for South Korea respondents the most attractive EU Member States are France, Germany and the UK. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and the UK (related to Brexit).
- Meanwhile the results concerning institutions demonstrate a similar tendency for both survey and media analysis EU datasets, showing the ECB (as an institution) in the first place, probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in Chosun Daily, Joongang Daily and Maeil Kyungje Shinmun) (and respectively selected print media outlets in other target countries) during the period

April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1238).



In this case tendencies in South Korea are similar to those of the other Strategic Partner countries – the dominant actors being linked to Brexit, Brexit and the state of the economy in the EU during the media monitoring period.

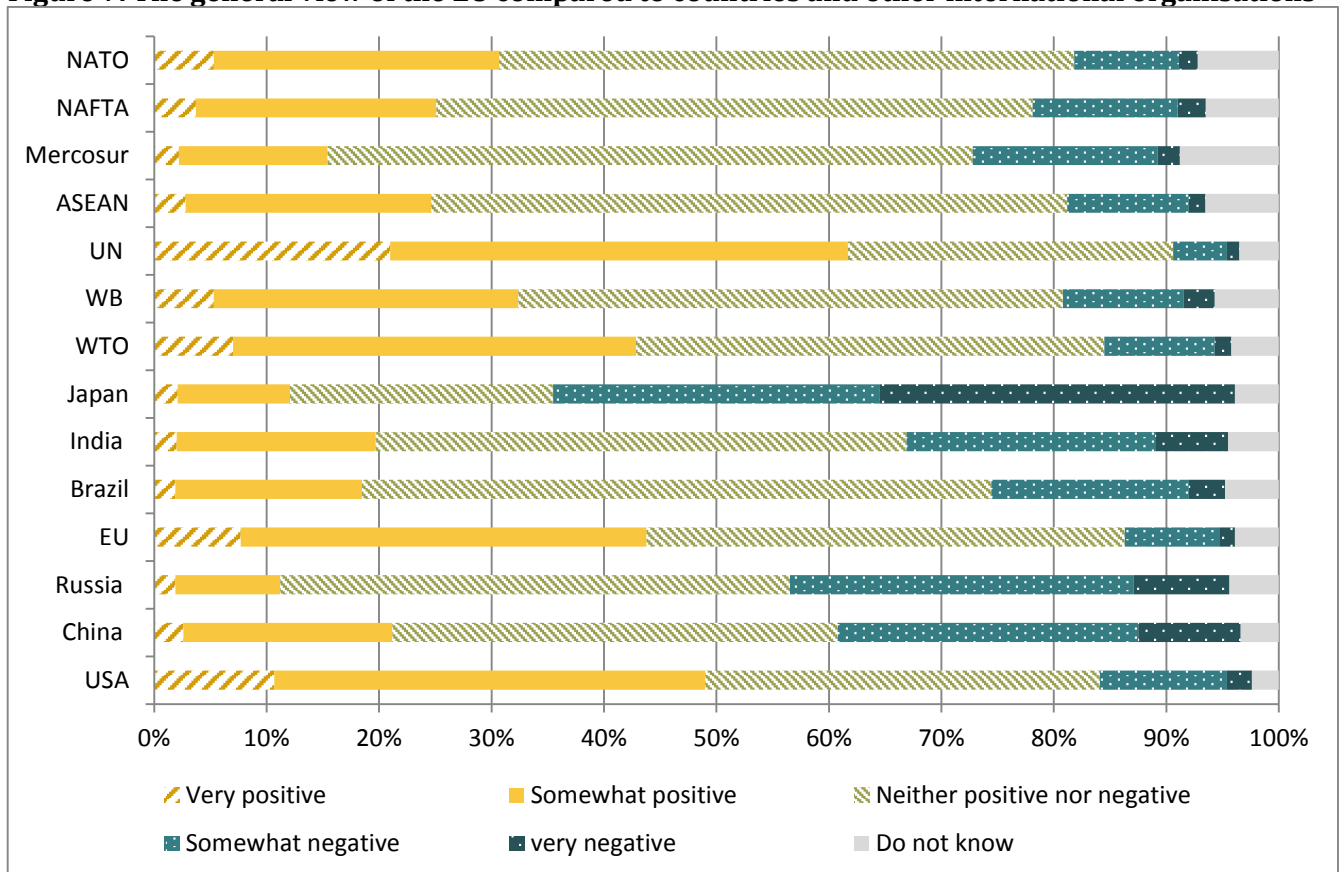
[→ comparative overview]

Actorness

Overall evaluation of the EU among the general public

From the point of view of the South Korean general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only the US, and in the case of the latter – it outranked all organizations except the UN. A total of 44% of South Korea respondents viewed the EU positively, compared to 10% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1238).



Looking at how the EU is evaluated in South Korea as compared to in the other Strategic Partner countries, South Korea respondents evaluated the EU relatively less positively than those of other countries in the sample. Negative evaluations were similar to the 10-country average.

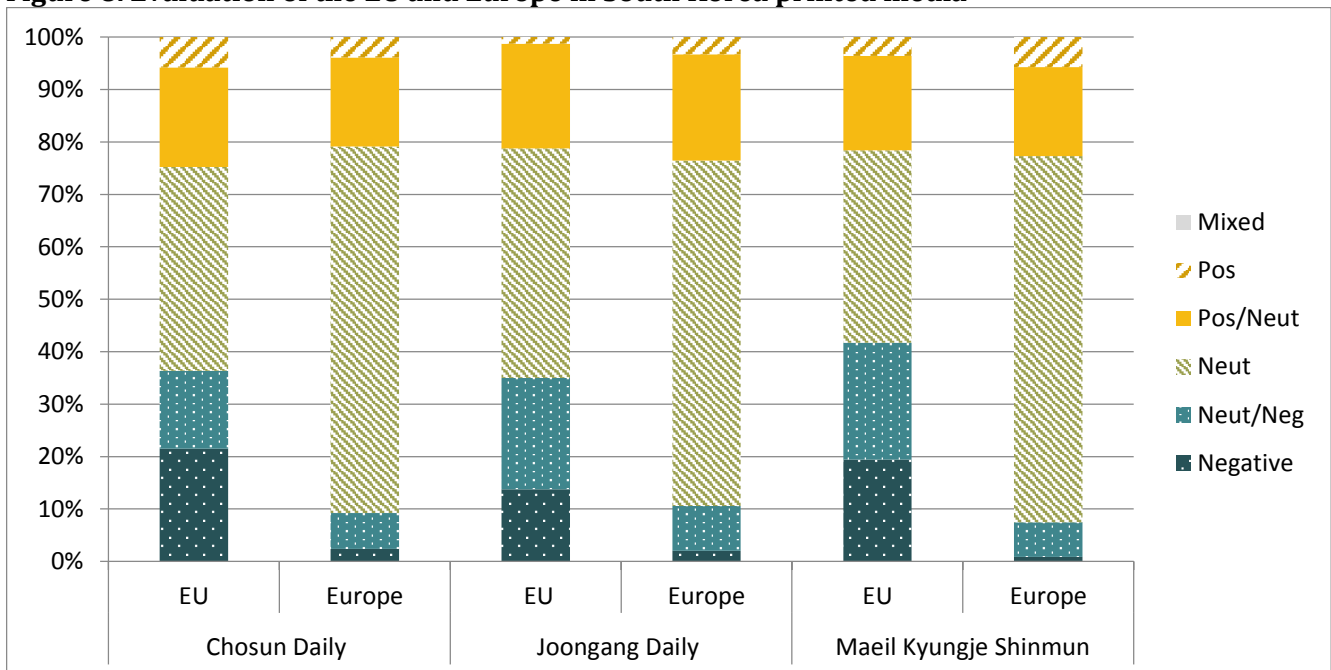
[→ comparative overview]

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, South Korea newspapers evaluated it somewhat more negatively than positively – some 23% of articles had the EU framed positively as opposed to 38% where it was framed negatively (Figure 8). Europe coverage, however, is more positive in evaluations – it was evaluated positively in 22% and negatively in 9% of the dataset.

Regarding the South Korean media sub-frames of EU news, in the politics frame the chosen outlets were more inclined to cover internal issues of the EU (such as the UK election) rather than external ones. In the economy frame, the state of economy, business/finance and trade issues were dominant - more specifically, the Greek economic crisis, the ECB’s quantitative easing and trade between the EU and South Korea. In the social affairs frame, migration ranked first (refugees), health care (fall prevention and tinnitus) second, and social legislation (welfare laws) the third among the most reported topics.

Figure 8. Evaluation of the EU and Europe in South Korea printed media

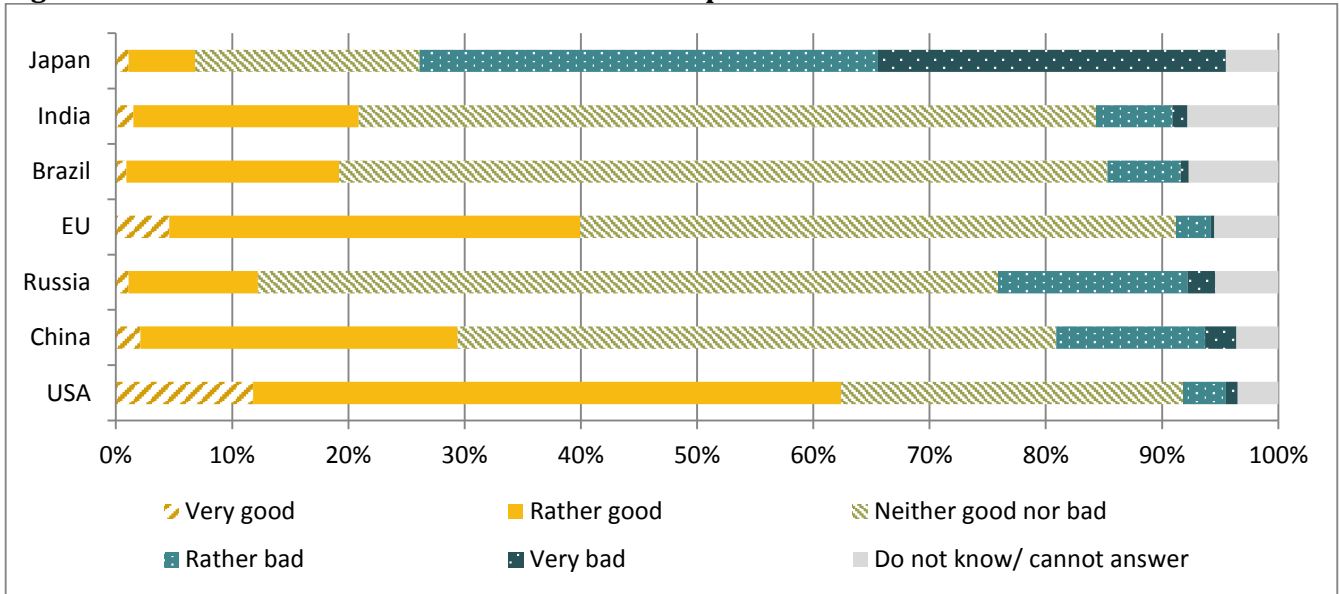


Note: Based on observation of news articles mentioning the EU and Europe in Chosun Daily, Joongang Daily and Mael Kyungje Shinmun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with South Korea

According to the public opinion poll, the South Korean general population views their country’s relationship with the EU to be mostly good, behind only that with the US. Some 40% of respondents view it as good, compared to 3% that view it negatively (Figure 9). South Korea population’s views of the EU in general (Figure 7) and the South Korea-EU relationship is similarly positive, whereas a higher portion of respondents had a negative evaluation of the EU in general than the bilateral relations.

Figure 9. Evaluation of the South Korea’s relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US’ overall relationship with each of the following countries and organisations? (N = 1238).



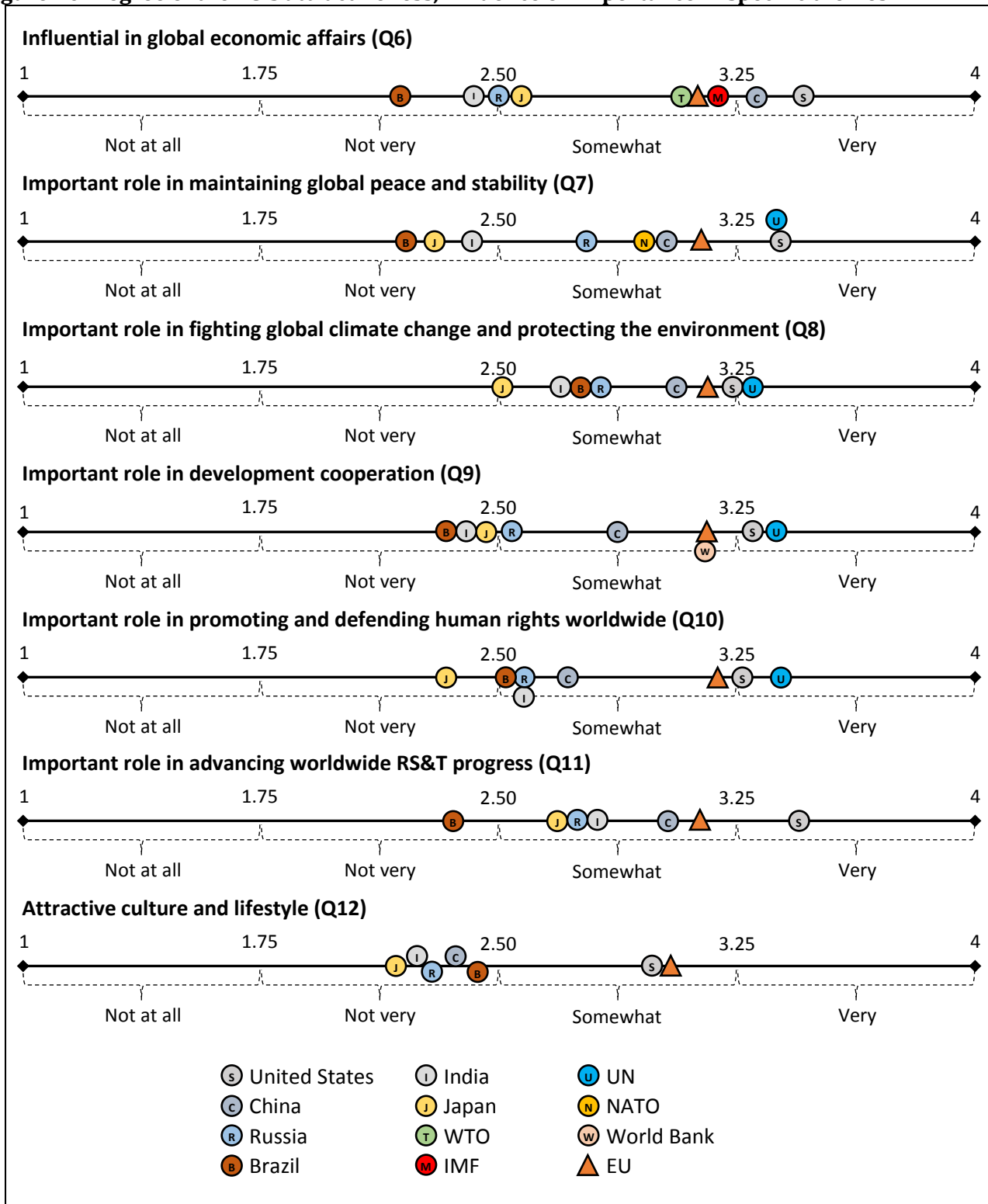
Comparing how the South Korea general population views their country’s relationship with the EU with the other Strategic Partner countries in the sample, it doesn’t stand out, and the extent of positive and negative evaluations is close to the 10-country average.

[\[→ comparative overview\]](#)

Importance of the EU in selected thematic fields

Overall, the general public in South Korea sees the EU as a somewhat influential, important and attractive international actor in each area listed in Figure 10. Looking comparatively at which areas the EU was seen as more important in over others, none stood out – the EU is seen as similarly important in global economic affairs; maintaining global peace; protecting the environment; development cooperation; defending human rights, advancing worldwide RS&T and upholding an attractive lifestyle. The EU is among the top 3 most influential, important and attractive international actors in most of the thematic areas except global economic affairs. The general public in South Korea found the US, China and IMF as more influential in global economic affairs than the EU.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1238). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



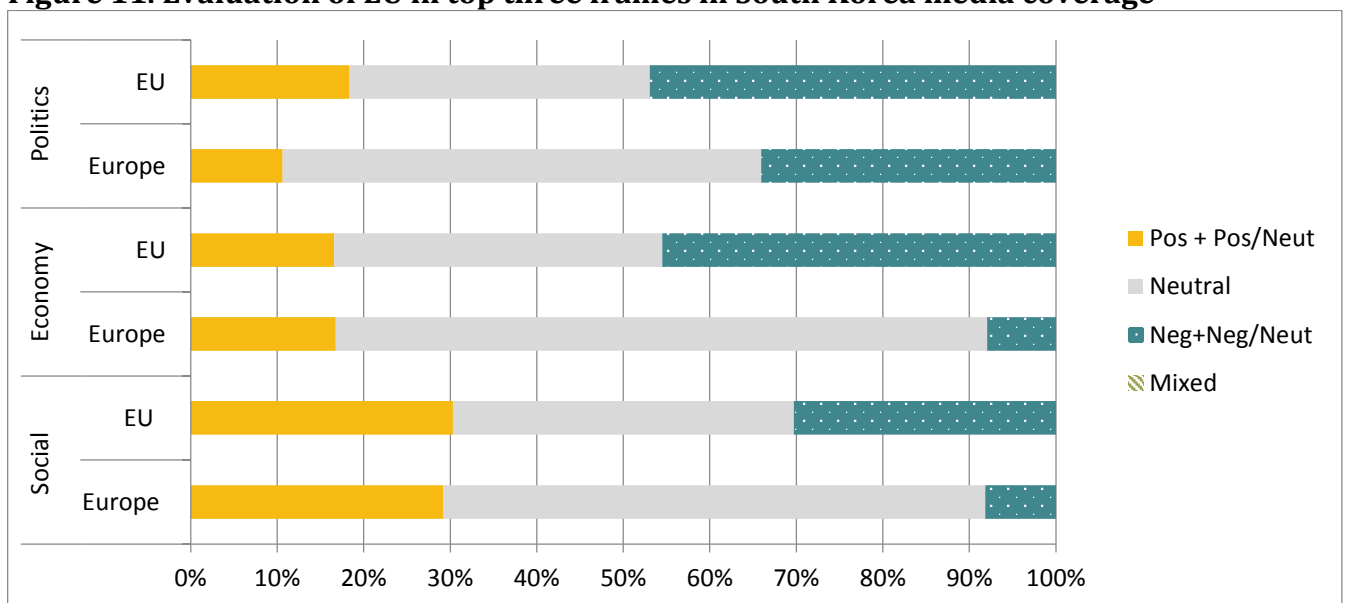
Looking comparatively at how important SP country publics find the EU across thematic areas listed in Figure 10, South Korea doesn't stand out, and sees the EU between somewhat and very important across all areas.

[\[→ comparative overview \]](#)

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in South Korea media coverage: politics, economy and social, Europe coverage was more neutral and balanced in the extent of positive and negative evaluations, whereas the EU was more often framed negatively, particularly in the political and economic frames.

Figure 11. Evaluation of EU in top three frames in South Korea media coverage



Note: Based on observation of news articles mentioning the EU and Europe in Chosun Daily, Joongang Daily and Maeil Kyungje Shinmun (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

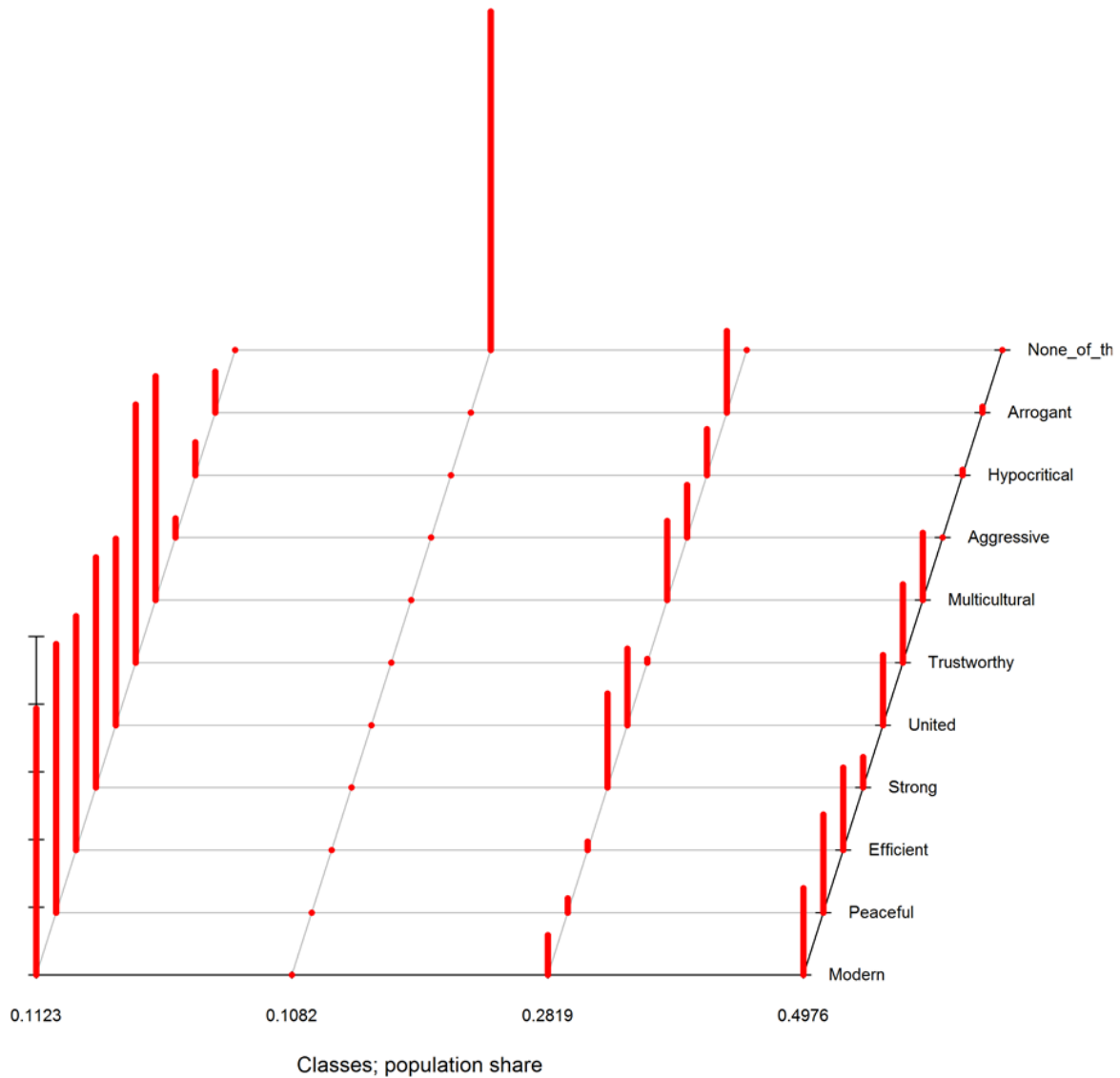
Most common descriptors used by general population in association to EU

The general population in South Korea chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes in South Korea:

- Only positive and few descriptors – 50% (top 3: modern, peaceful, multicultural).
- Mixed, but mostly negative descriptors – 28% (top 3: arrogant, multicultural, aggressive).
- Mixed, but mostly positive and many descriptors – 11%.
- No opinion on the EU and its descriptors – 11%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the classes with only positive (50% class) and mostly positive (11% class) descriptors as compared to the class with mostly negative descriptors (28% class).

Figure 12. Latent class analysis of EU's descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1238) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all 10 SP countries except in Russia, the general population in South Korea chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, the South Korea population doesn't stand out. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview\]](#)

Effectiveness

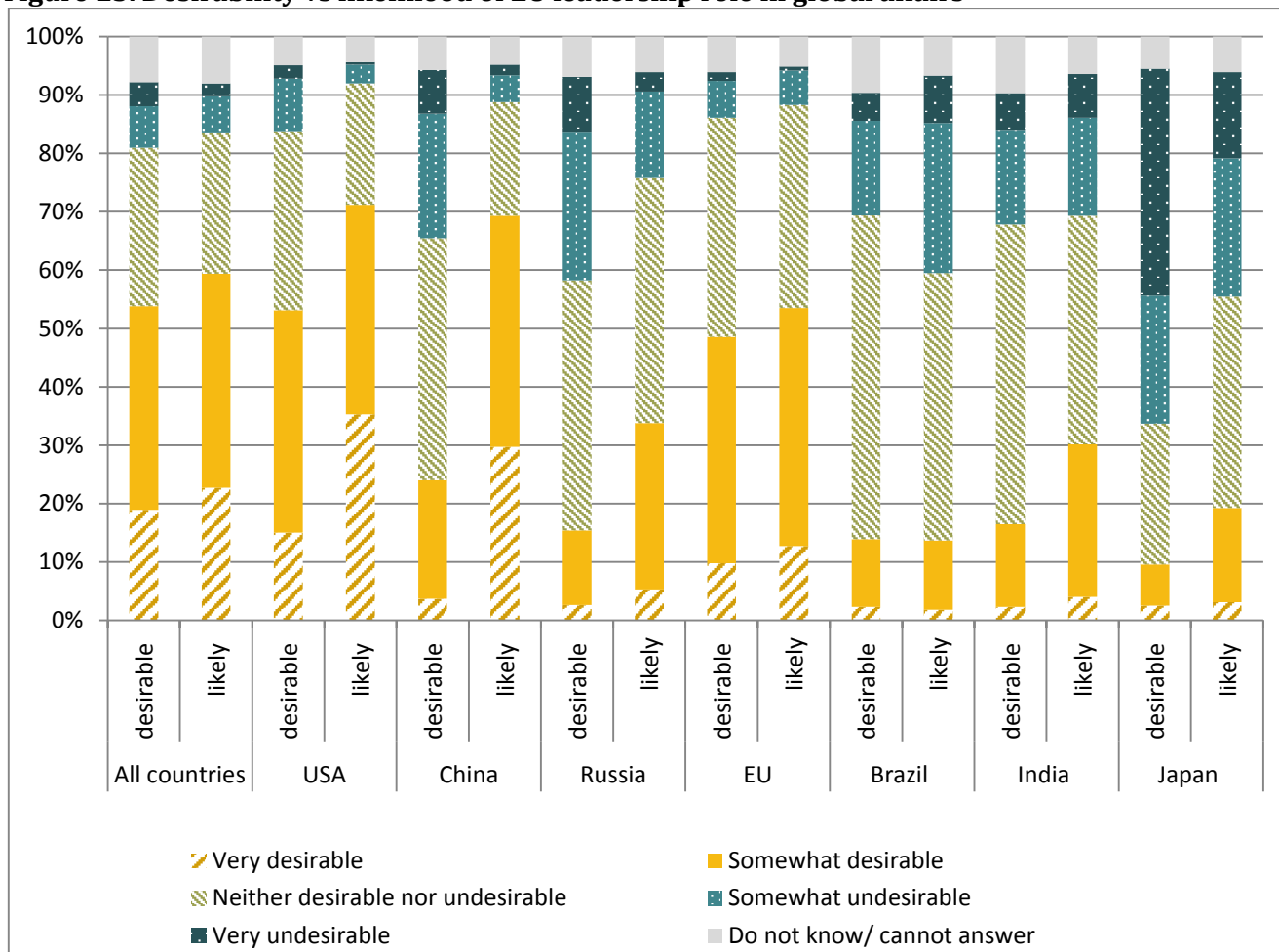
Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade,

research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public finds EU global leadership both desirable and likely. Looking at desirability of its leadership, the EU falls behind only the US, meanwhile regarding the likelihood of it assuming this role, the EU appears behind China as well.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1238)

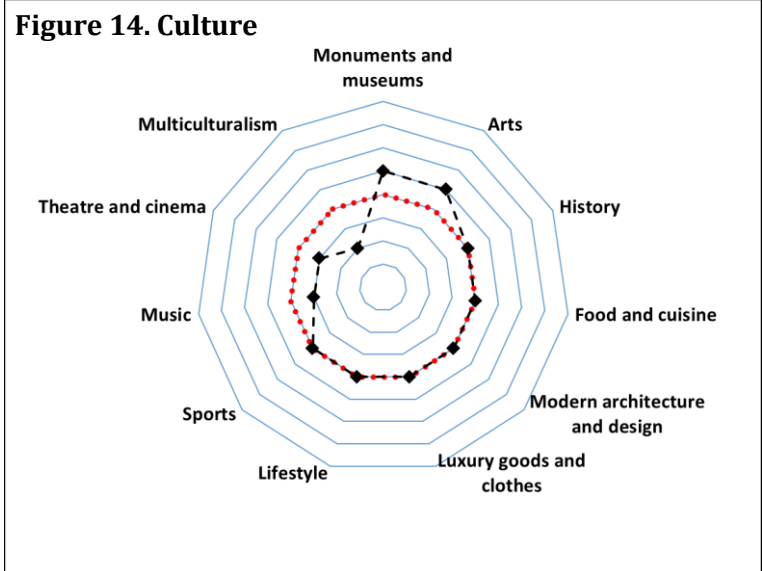


Looking comparatively at how desirable and likely EU future global leadership appears for SP country publics, in South Korea the population finds EU global leadership relatively less likely and less desirable.

[→ [comparative overview](#)]

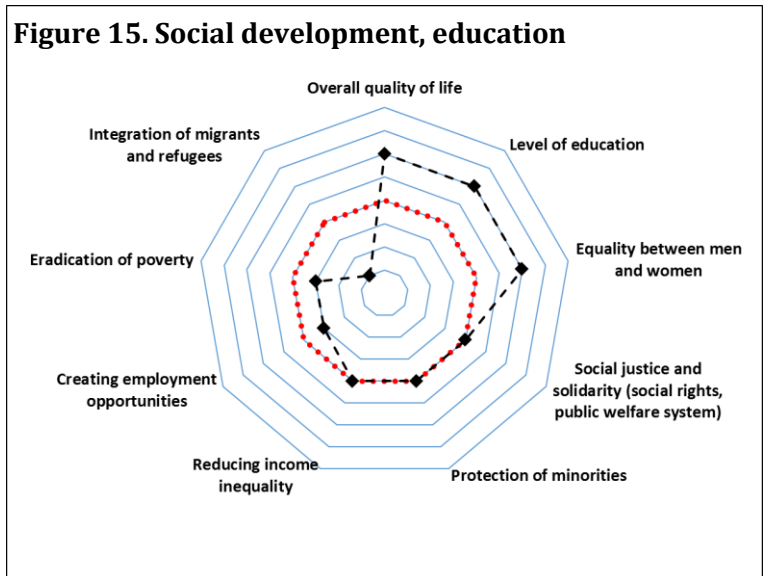
Culture

In the area of culture, the general public in South Korea had the most positive views towards the EU’s effectiveness in terms of monuments and museums, as well as arts. In contrast, they expressed least positive views in terms of multiculturalism. Across the remaining fields, respondents in South Korea expressed relatively less positive views about music, as well as theatre and cinema than towards any other field.



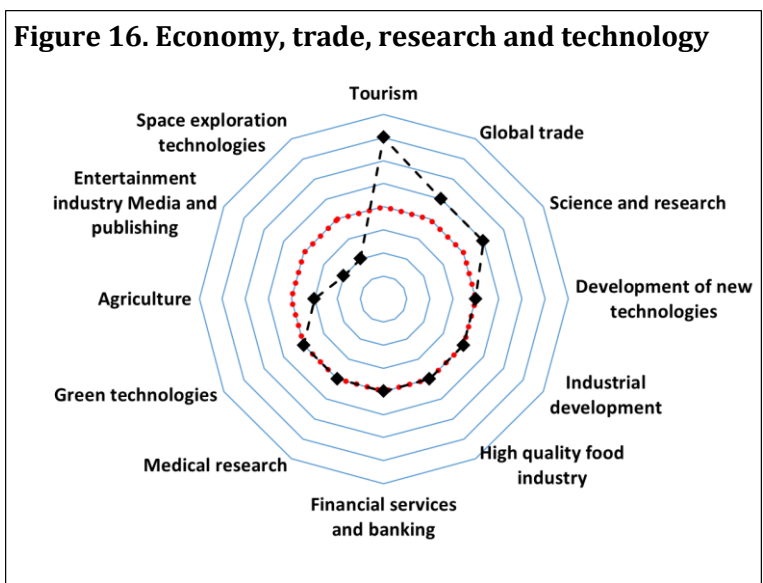
Social development and education

In the area of social development and education, respondents in South Korea had the most positive views about the EU’s performance in terms of education, quality of life, and gender equality. They expressed least positive views towards EU’s efforts at the integration of migrants and refugees. Across the remaining fields, South Koreans were relatively less positive as regards EU’s performance in eradication of poverty and creation of the employment opportunities.



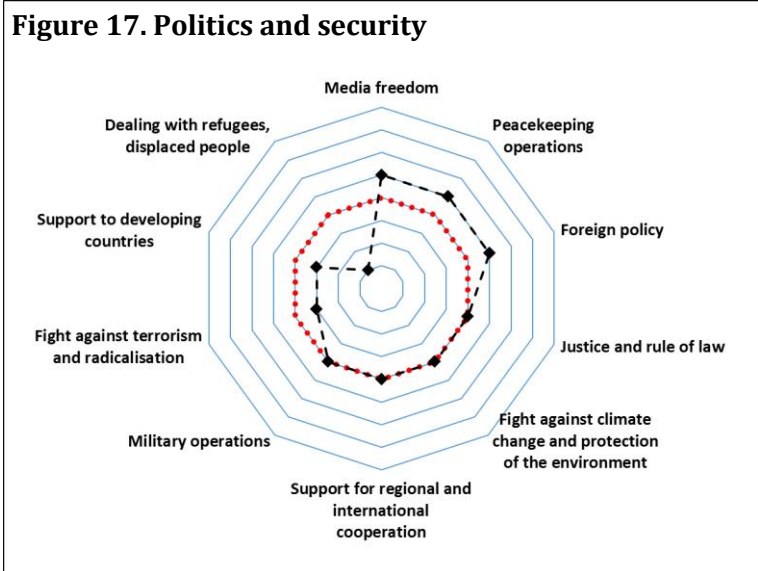
Economy and RS&T

In the area of economy and RS&T, respondents in South Korea were most positive about the EU’s performance in the field of tourism and least positive in the space exploration technologies and the entertainment industry, media and publishing. Across the remaining fields, South Koreans were relatively less positive about EU’s performance in agriculture and relatively more positive about how it fares in science and research as well as global trade.



Politics and security

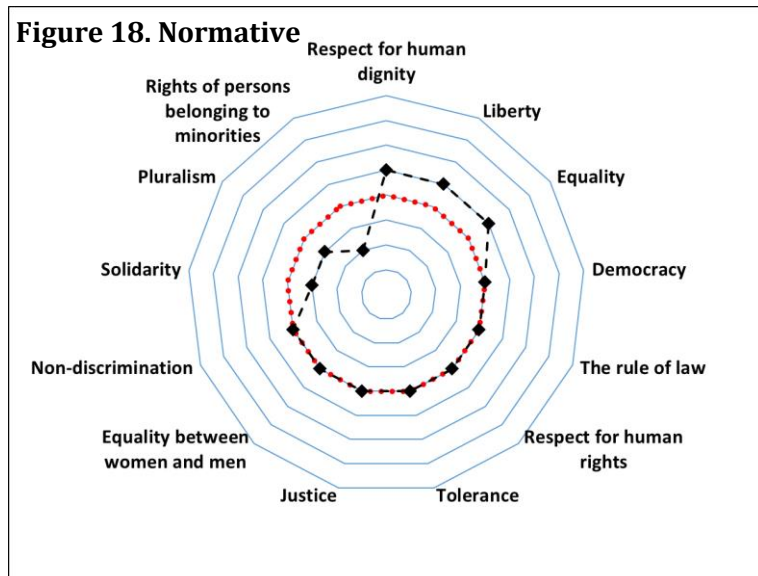
In the area of politics and security, respondents in South Korea were most positive about the EU’s performance in terms of foreign policy, peacekeeping operations and ensuring media freedom. On the contrary, they expressed least positive views about EU’s efforts in dealing with refugees and displaced people. Furthermore, across the remaining fields, South Koreans were relatively less positive towards EU’s performance in supporting developing countries and fighting against terrorism and radicalisation.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1238). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

With regards to normative topics, respondents in South Korea reported that their views are most similar to those of the EU on the issues related to liberty and equality, and respecting human dignity. In contrast, they found EU’s views on minority rights least similar to their own. Across the remaining areas, slightly less respondents found similarity in their personal point of view with that of the EU in terms of solidarity and pluralism.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1238). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, older respondents had a more positive general view of the EU, the South Korea-EU relationship and EU's influence across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). Older respondents also found the EU more attractive and a more desirable and likely global leader. In terms of **gender**, women were less positive about South Korea's relations with the EU, and found EU global leadership less desirable.

Higher **income** was linked to a more positive general view of the EU and EU's influence across different thematic fields. These respondents had a more positive view of the South Korea-EU relationship, found the EU more attractive and a more desirable and likely global leader. **Working status** also featured among explanatory criteria – respondents who were employed at the time of the study had a more positive general view of the EU and the South Korea-EU relationship, found the EU more attractive and a more desirable and likely global leader. Lastly, the **region of residence** accounted for some differences in perceptions – respondents from the North found EU global leadership more likely.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Respondents that feel they have **sufficient information on the EU** reported more positive views of the South Korea-EU relationship. Those that have had **contact with Europe** had a more positive general view of the EU and EU's influence across different thematic fields (economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). This group of respondents also found the EU to be more attractive and a more desirable and likely global leader.

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	S. Korea-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	...	Women ↓	...	...
Age	...	Older ↑	Older ↑	Older ↑	Older ↑	...	Older ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	More informed ↑	...	...	...	...
Income	...	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑
Level of education
Working status	...	Employed ↑	Employed ↑	Employed ↑	Employed ↑	Employed ↑	...
Region	North ↑	...

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1238). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting South Korean views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria



13 THE UNITED STATES



Executive Summary

In the US awareness of the EU compared to a list of preselected countries and organisations provided in the survey was below that of the countries, but above other listed international organizations, with the exception of the UN. EU visibility in terms of how frequently people hear about the EU is rather low, as many as 24% of the American respondents never hear about it or cannot provide an opinion, while only 11% hear about it every day or week. The main sources for getting info on the EU are TV channels, online media (including online versions of print media) and print media. Most visible themes in both EU and Europe news in print media used for analysis are politics, economy and social and cultural.

The EU was among the most positively viewed countries and international organisations in the US. American respondents find the EU is among the top 3 most influential, important or attractive international actors in most areas except Research, Science and Technology (RS&T). Most common descriptors for the EU among US respondents were ‘multicultural’, ‘modern’ and ‘peaceful’. As regards representations of the EU in the media, US newspapers presented balanced evaluations, most of which were neutral. The remainder of the articles were more often framed negatively than positively, with Europe coverage overall more neutral. In the US, media portrays the EU most often when dealing with the migration crisis, the Greek debt crisis, the anti-trust cases against Google, environmental policies and the Iran nuclear deal. Remarkably, the media reports on EU issues using a low share of EU news with a ‘local hook’, that is, reports are not connecting EU topics to (local) events and developments in the US.

As concerns desirability and likelihood of EU global leadership, the American public ranks the EU only behind the US itself, meanwhile regarding the likelihood of it assuming this role, the EU is slightly behind China as well. Looking specifically at EU’s effectiveness within different fields, comparing different subfields in culture, the EU is best regarded for its monuments and museums and history, and relatively least so for the theatre, cinema and sports. In different areas linked to social development and education, the EU is seen best for education and quality of life and least so for protection of minorities, reducing income inequality and integration of migrants and refugees. In economy and RS&T, the EU is best regarded for tourism and least so for space exploration technologies. As regards politics and security, US respondents were slightly less positive about EU’s efforts in dealing with refugees and displaced people.

[\[→ Full Country Chapter: Final Report Chapter 3.10 p.236\]](#)

[\[→ List of potential partners: Final Report Table 31: p.285\]](#)

THE UNITED STATES



Context

The US became EU's Strategic Partner in 1995. Related key documents: New Transatlantic Agenda (1995) and Transatlantic Economic Partnership (TEP) (1998).

The most important potential FTA agreement – Transatlantic Trade and Investment Partnership (TTIP) (negotiations launched in 2013).

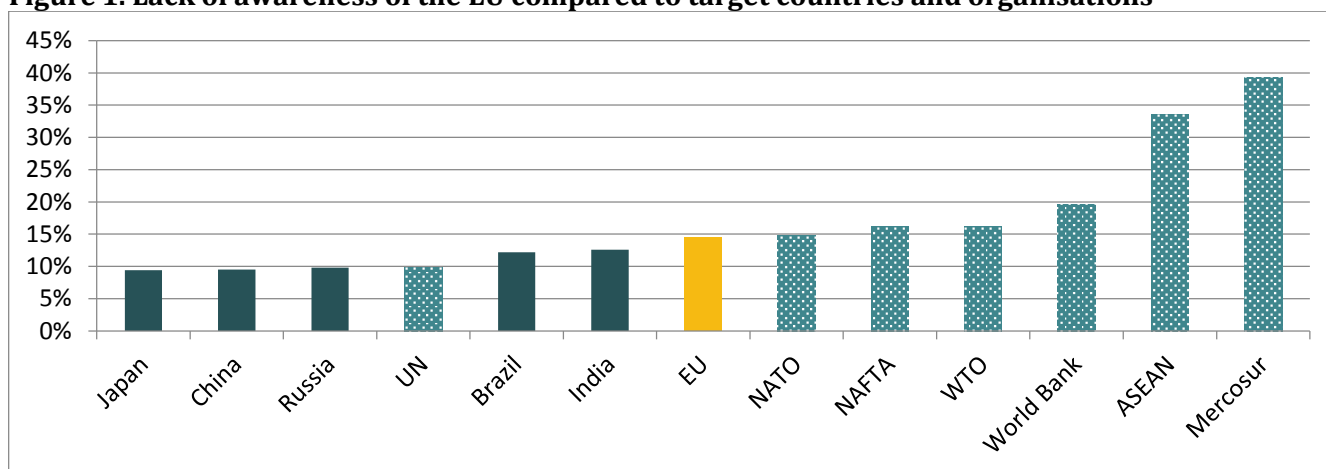
EU-US Trade Relations constitute the largest bilateral trade relationship in the world. EU export in goods to the US (2014 data): €311 bn; EU import in goods from the US: €206.1 bn.

Visibility

Awareness of the EU in the US – are people familiar with the EU?

Since awareness is a difficult concept to assess directly, in this study we used a proxy for this measurement. Awareness of the EU as such was gauged by the percentage of public opinion poll respondents that couldn't provide an opinion on how positive, neutral or negative their view of the EU is. Based on this, in the US awareness of the EU is below that of the countries used for comparison. The US general public, however, finds the EU more visible than most other international organisations, with the exception of the UN.

Figure 1. Lack of awareness of the EU compared to target countries and organisations



Note: Based on the answers to survey Q1 (option 'Do not know/ cannot answer'): Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1007).



Compared to other countries, awareness of the EU in the US (14% unaware/ 86% aware) is the lowest together with the ones of Japan (14% unaware/ 86% aware) and Canada (15% unaware/ 85% aware).

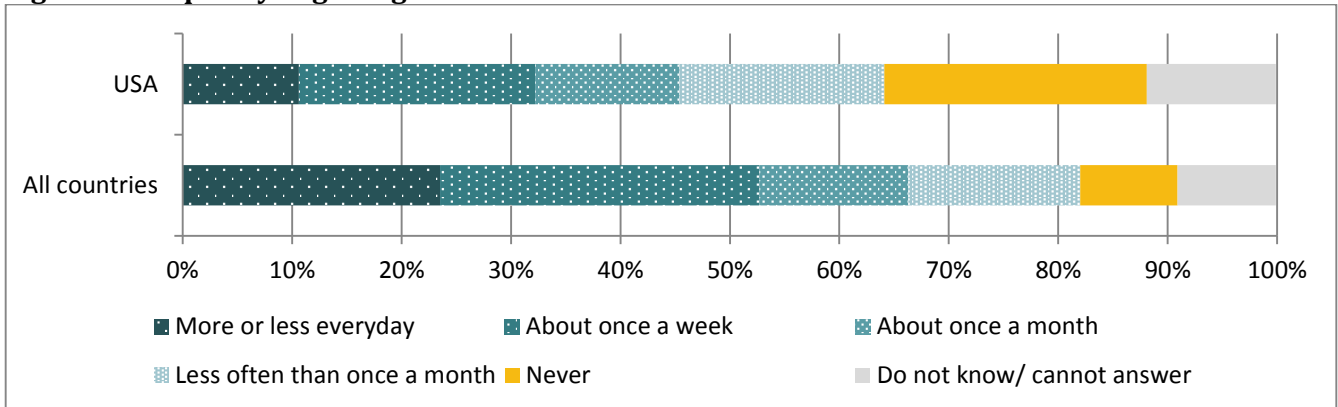
[\[→ comparative overview \]](#)

General visibility of the EU – how frequently people hear about the EU?

As revealed by the public opinion poll, the degree of visibility of the EU in the United States is relatively low. Most US respondents (24%) stated that such information would never reach them. The other two largest respondent groups hear or read about the EU approximately once a week

(22%) or less often than once a month (19%). Meanwhile, the smallest group of US respondents (11%) stated that they hear or read about the EU more or less every day.

Figure 2. Frequency of getting information about the EU



Note: Based on the answers to survey Q27: Generally, how often if ever do you hear or read about the European Union? This can be on TV or the radio, via the Internet, or in newspapers or magazines...or simply by word of mouth... (N = 1007).



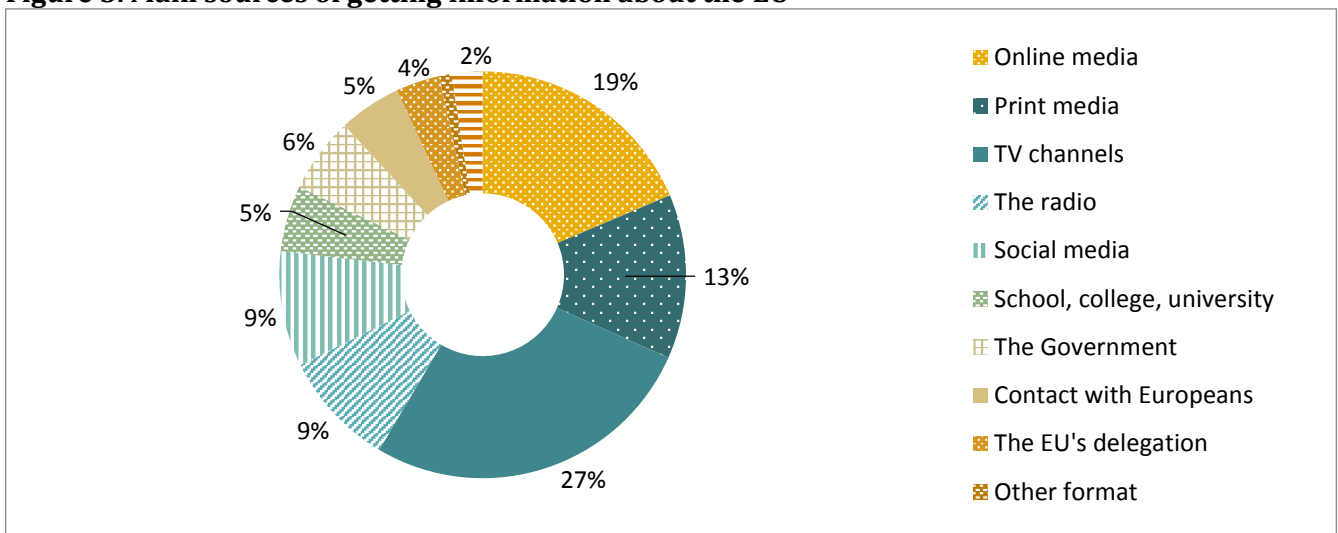
The frequency of hearing or reading about the EU in the US, as compared to results in other Strategic Partner countries, is relatively low. The share of American respondents who stated that information about the EU would never reach them is the highest compared to results in other SP countries.

[→ comparative overview]

Main sources of information

As revealed by the public opinion poll, main sources of information on the EU in the US are TV channels (27%), online media (19%) and print media (13%). Meanwhile, social media (9% - the same percentage as radio) in comparison proved a less significant information channel on the EU.

Figure 3. Main sources of getting information about the EU



Note: Based on the answers to survey Q28: And which of the following best describes the main sources of information where you read or hear about the European Union or more generally Europe as a whole? (N = 650).



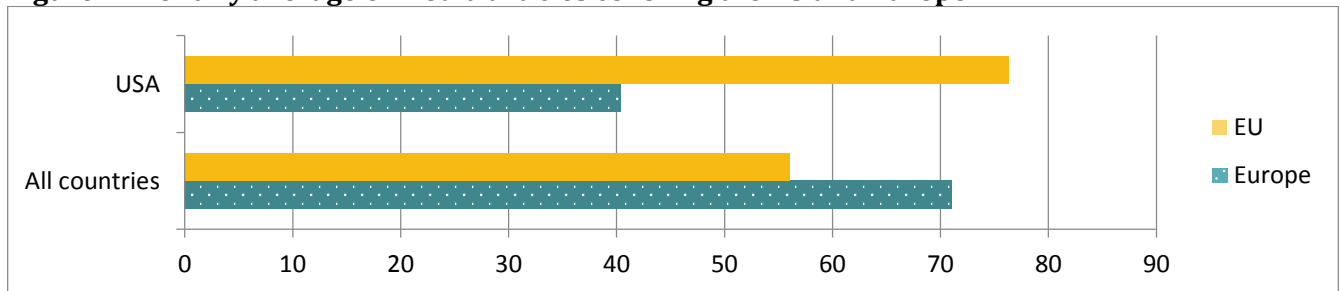
Compared to the other 9 SP countries, US respondents marked the same sequence of most popular media sources (TV channels, online media and print media) as those in Canada, Japan and South Korea.

[\[→ comparative overview\]](#)

Volume of media articles

According to media analysis, the selected US popular and business print media outlets mention the EU (monthly average – 76 articles) more frequently than Europe (40).

Figure 4. Monthly average of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The New York Times, Washington Post and The Wall Street Journal (and respectively selected print media outlets in other target countries) during the period April-June, 2015.



Compared to results in other target countries, the US is among countries with the most articles covering the EU. This is contrary to the general tendency in the Strategic Partner countries where Europe is covered more frequently (71) than the EU (56).

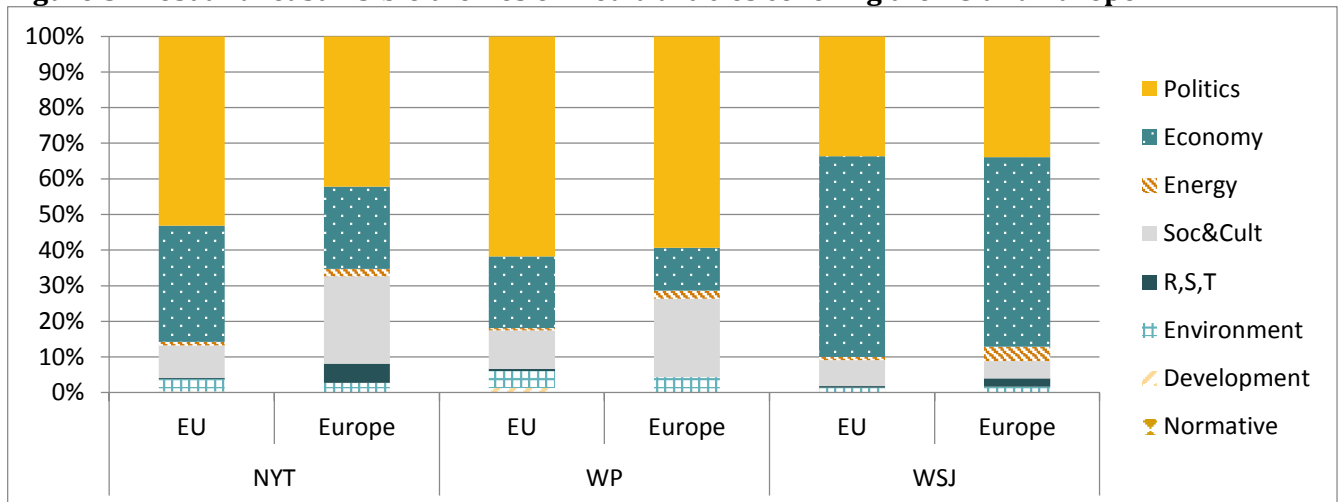
[\[→ comparative overview\]](#)

Most and least visible themes

The majority of US media coverage of the EU concerns politics (111 articles/month) and the economy (86), and, to a lesser extent, social and cultural issues (20), with other topics getting little media coverage (31). In political news coverage concerning the EU, the main internal EU issue was Brexit, while most news concerning external EU politics focused on US foreign and domestic politics. In economic news related to the EU, the state of the economy was the dominant subtheme. Finally, social and cultural news, the third most popular frame in EU-related news in the US, was mostly focused on migration issues. The topics that appeared least often in news mentioning the EU were normative (where the EU is presented as a standard to follow in a specific issue or theme), RS&T and development.

The proportion of the most visible themes related to Europe does not differ from the one of the EU, though in the case of Europe, other themes besides politics and economy (social and culture, RS&T, energy) are covered more often than in articles mentioning the EU. This partly coincides with the results of the survey: in the US, respondents associated areas as economy and politics are first and foremost with the EU, whereas they more often linked culture, sports and science to Europe.

Figure 5. Most and least visible themes of media articles covering the EU and Europe



Note: Based on observation of news articles mentioning the EU and Europe in The New York Times, Washington Post and The Wall Street Journal during the period April-June, 2015.



Though media analysis results in the US show very similar tendencies as in the media coverage of the EU in the other SP countries (politics, economy and social & culture being the three most visible EU themes, with some variation in their ordering), only in the US, Japan and Mexico politics is a more visible frame than economy.

[→ [comparative overview](#)]

The most recognizable EU/ European countries, EU institutions, EU/ European MS people

- Survey results show that for the US respondents the most attractive EU Member States are Italy, France and the UK. However, the results of media analysis of articles mentioning the EU present another perspective, highlighting the countries that are mostly related to topical issues during the media monitoring period in April-June of 2015, namely Greece (related to Grexit), Germany and France.
- The results concerning institutions also show similar tendency. While the survey revealed the ECB as the second most recognisable institution, media analysis results for the EU dataset show ECB in first place, probably determined by its relevance for the EU state of economy (one of the dominant EU sub-frames).
- The most visible individuals, as shown only by media analysis, are again related to dominant sub-frames – Brexit and EU state of economy (implicitly linked to Grexit).

Figure 6. The most recognizable EU/ European countries, institutions and people



Note: Based on (1) observation of news articles mentioning the EU and Europe in The New York Times, Washington Post and The Wall Street Journal during the period April-June, 2015; (2) answers to survey Q25: Please tell me which European countries look the most attractive to you?; Q26: Would you say that you have ever seen, heard or read about...? (N = 1007).



In this case tendencies in the US are similar to those of the other Strategic Partner countries – the dominant actors being linked to Grexit, Brexit and the state of the economy in the EU during the media monitoring period.

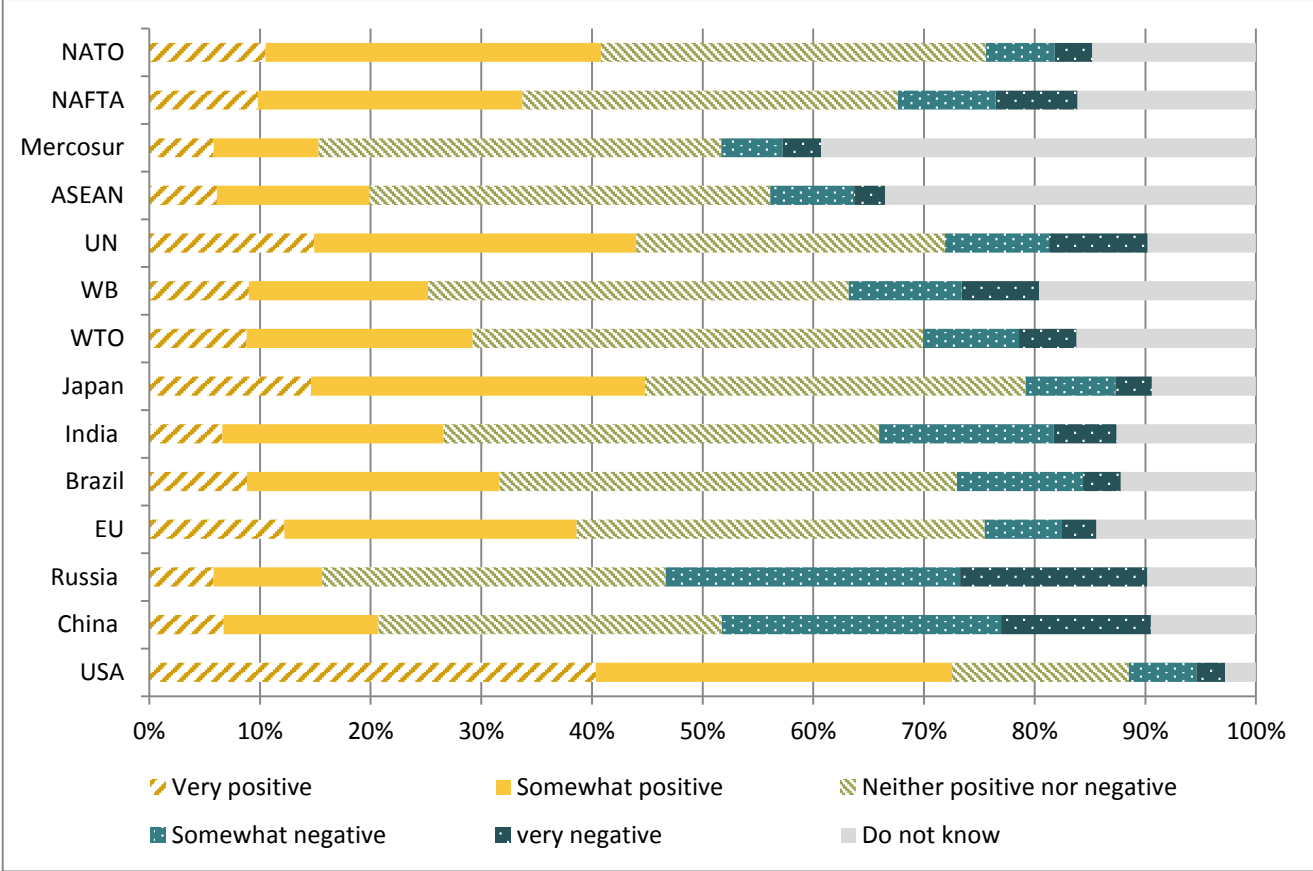
[→ comparative overview]

Actorness

Overall evaluation of the EU among the general public

From the point of view of the US general population, the EU was among the most positively viewed global actors when comparing to a preselected list countries and multilateral organizations. In the case of the former, the EU ranked below only the US and Japan, and in the case of the latter – it outranked all organizations except the UN and NATO. A total of 39% of US respondents viewed the EU positively, compared to 10% that viewed it negatively.

Figure 7. The general view of the EU compared to countries and other international organisations



Note: Based on the answers to survey Q1: Generally speaking, as an overall point of view, please tell me how positive or negative you feel about each of the following countries and organisations? (N = 1007).



Looking at how the EU is evaluated in the US as compared to in the other Strategic Partner countries, US respondents evaluated the EU more positively only than did respondents in Canada, Japan and Russia, while in all other countries the general population was more positive about the EU. Negative evaluations were similar to the 10-country average.

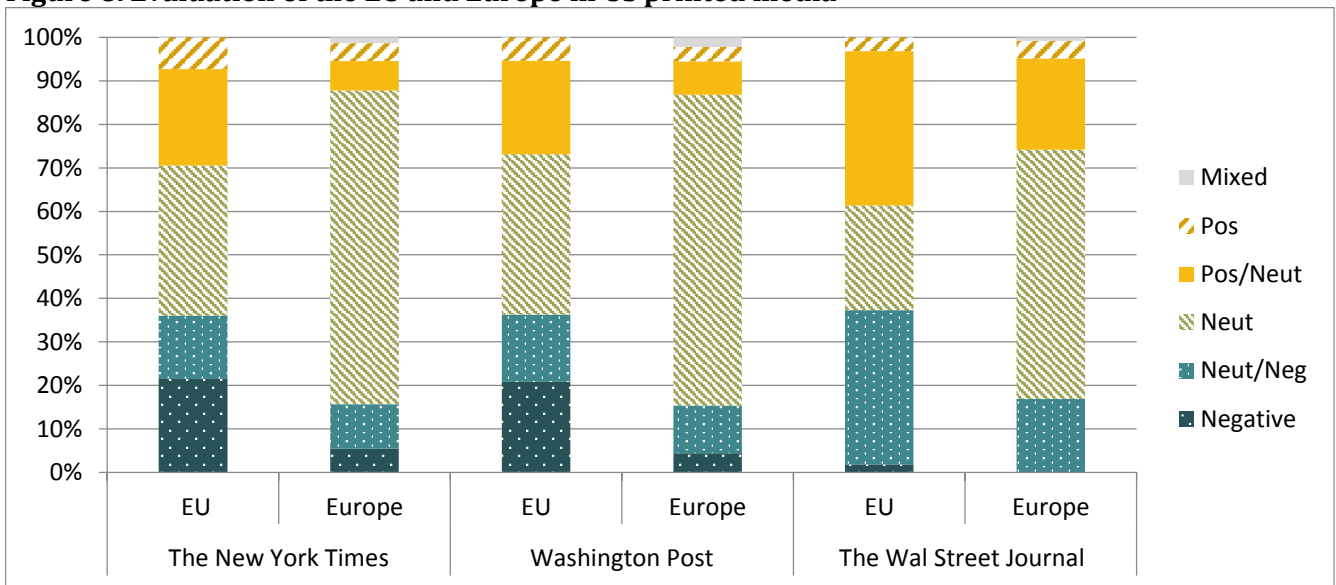
[→ comparative overview]

Overall evaluation of the EU and Europe in the media

As concerns representations of the EU in the media, overall, US newspapers evaluated it slightly more negatively than positively – some 32% of articles had the EU framed positively as opposed to 36% where it was framed negatively (Figure 8). Europe coverage, however, is more balanced and also more neutral in evaluations – Europe was evaluated positively in 16% of the articles and the same percentage evaluated it negatively.

In the USA, media portrays the EU most often when dealing with the migration crisis, the Greek debt crisis, the anti-trust cases against Google, environmental policies and the Iran nuclear deal. Remarkably, the media reports on EU issues using a low share of EU news with a ‘local hook’, that is, reports are not connecting EU topics to (local) events and developments in the USA.

Figure 8. Evaluation of the EU and Europe in US printed media

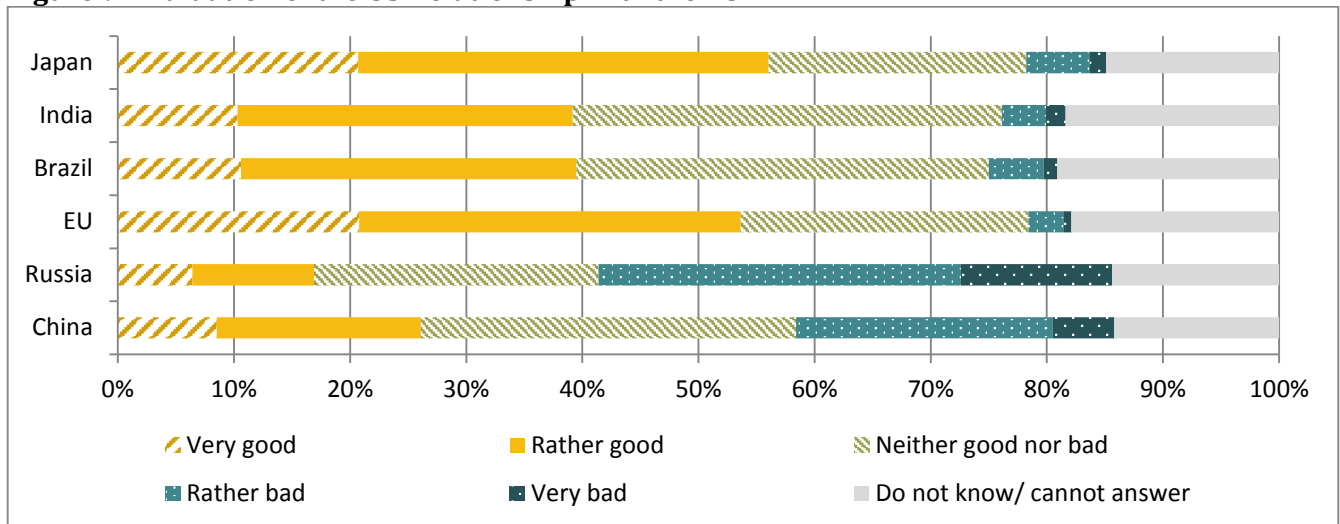


Note: Based on observation of news articles mentioning the EU and Europe in The New York Times, Washington Post and the Wall Street Journal (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

EU’s relationship with the United States

According to the public opinion poll, US general population views their country’s relationship with the EU to be mostly good, behind only Japan. Some 54% of respondents view it as good, compared to 4% that view it negatively (see Figure 9). Interestingly, respondents gauged the US relationship with the EU more positively than their general view of the bloc (see Figure 7) by as much as 15 percentage points. This reveals that while the US general public is more ambivalent in its overall assessment of the EU, this doesn’t affect the generally positive perception of bilateral relations.

Figure 9. Evaluation of the US' relationship with the EU



Note: Based on the answers to survey Q3: Generally speaking, which of the following best describes the US' overall relationship with each of the following countries and organisations? (N = 1007).



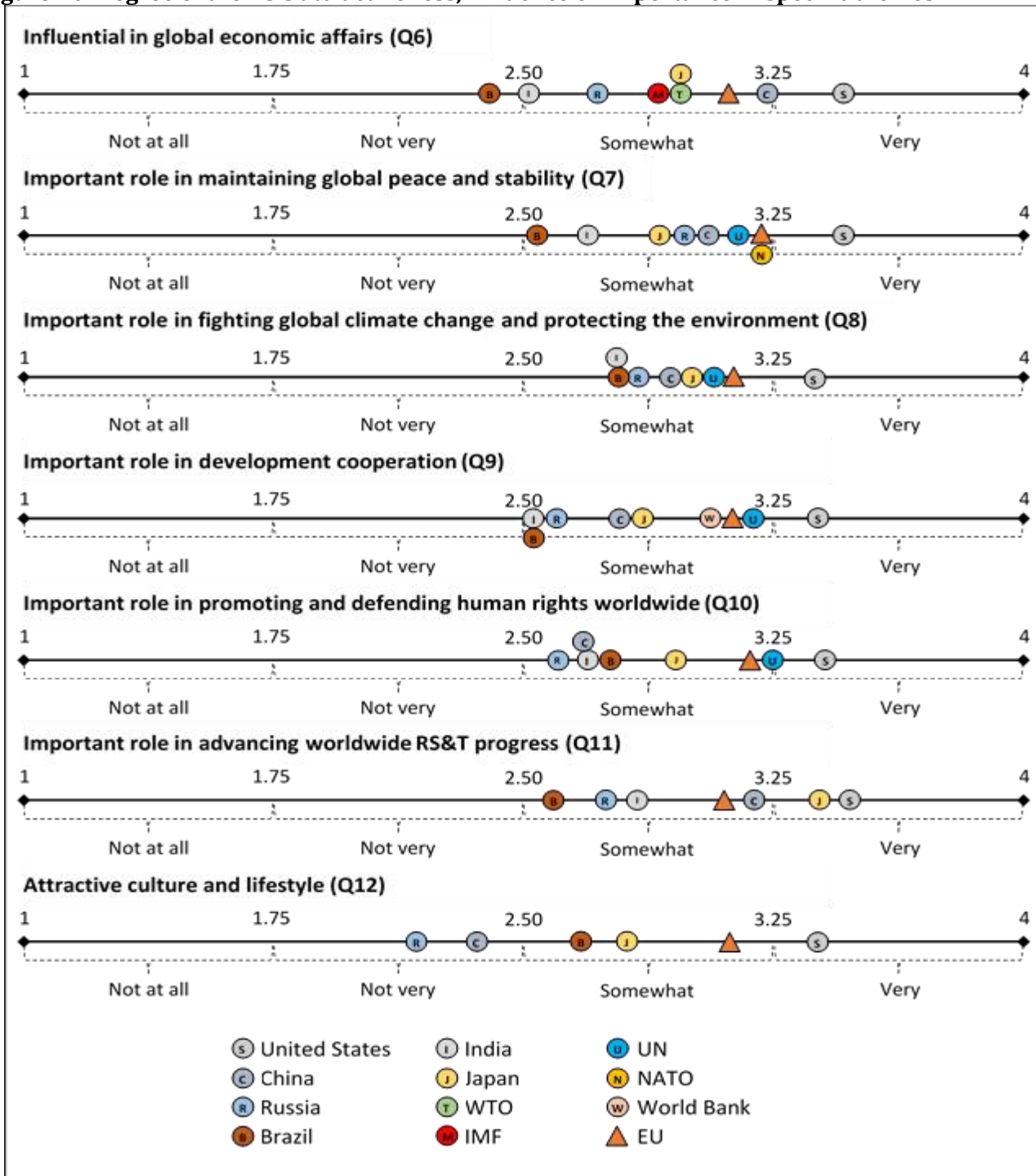
Comparing how the general population views their country's relationship with the EU with the other Strategic Partner countries in the sample, the US doesn't stand out, and the extent of positive and negative evaluations is close to the 10-country average.

[\[→ comparative overview \]](#)

Importance of the EU in selected thematic fields

Overall, the general public in the US sees the EU as a somewhat influential, important and attractive international actor in each of the areas listed in Figure 10. Looking comparatively at which areas the EU was seen as more important in over others, none stood out – the EU is seen as similarly important in global economic affairs; maintaining global peace; protecting the environment; development cooperation; defending human rights, advancing worldwide RS&T and upholding an attractive lifestyle. The EU is among the top 3 most influential, important and attractive international actors in most of the thematic areas listed in the Figure 10 except RS&T. As for RS&T, the US general public found the role of China, Japan and the US as more important in advancing innovation and technological progress worldwide than the EU.

Figure 10. Degree of the EU's attractiveness, influence or importance in specific themes



Note: Based on the answers to survey Q 6-12 (N=1007). The numerical index represents the statistical mean of the responses and ranges from 1.00 (not at all attractive/ important/ influential) to 4.00 (very attractive/ important/ influential). Q6: In your view, how influential in global economic affairs are the following countries and organisations? Q7: In your view, how important a role do each of the following countries or organisations play in maintaining global peace and stability? Q8: In your view, how important a role do each of the following countries or organisations play in fighting global climate change and protecting the environment? Q9: In your view, how important a role do each of the following countries or organisations play in in providing support to developing countries to eradicate poverty and to build a fairer and more stable world? Q10: In your view, how important a role do each of the following countries or organisations play in in promoting and defending human rights worldwide to protect human dignity, freedom, equality and solidarity? Q11: In your view, how important are the following countries and organisations in advancing innovation and technological progress in the world? Q12: How attractive to you personally are the following countries in terms of their culture and lifestyle?



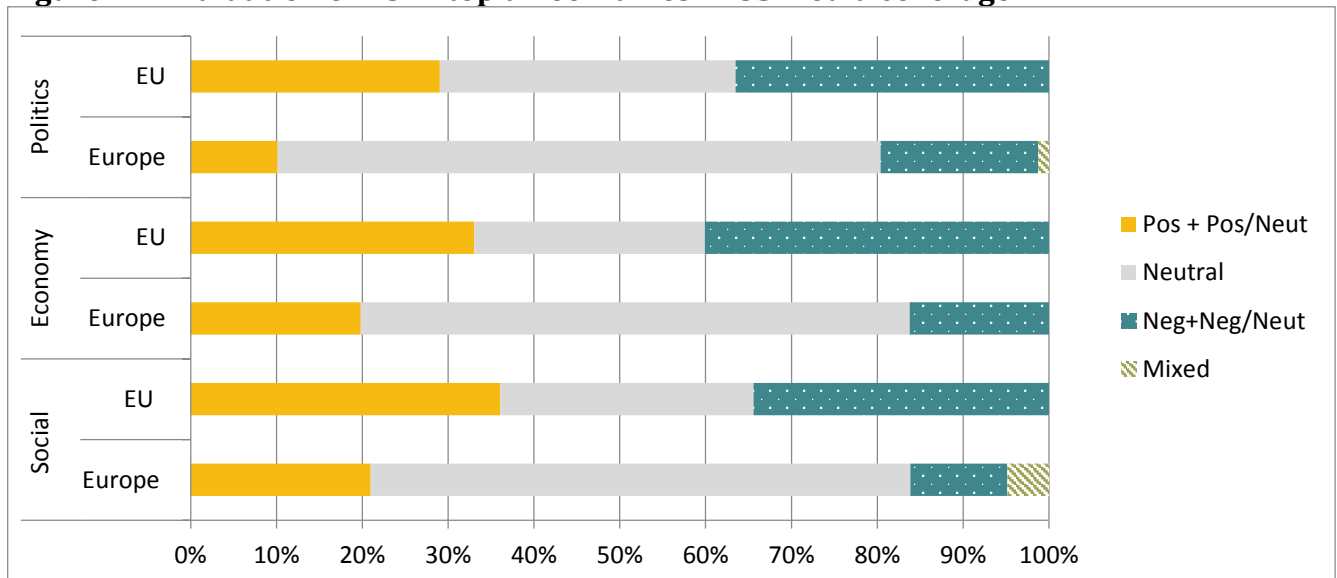
Looking comparatively at how important SP country publics find the EU in the thematic areas listed in Figure 10, the US population doesn't stand out and see the EU as somewhat to very important across all areas, slightly less so in advancing worldwide RS&T progress than in other areas.'

[→ comparative overview]

Thematic evaluations of EU and Europe in the media

Looking specifically at how the EU and Europe were evaluated in the three main frames that appeared in US media coverage: politics, economy and social, Europe was consistently evaluated more neutrally than the EU. The EU was more often framed negatively, mostly due to Europe coverage being more neutral in general. Among the three themes, the EU was framed more or less equally, albeit slightly more negatively in the economy compared to the politics and social frames.

Figure 11. Evaluation of EU in top three frames in US media coverage



Note: Based on observation of news articles mentioning the EU and Europe in the New York Times, Washington Post and the Wall Street Journal (and respectively selected print media outlets in other target countries) during the period April-June, 2015.

Most common descriptors used by general population in association to EU

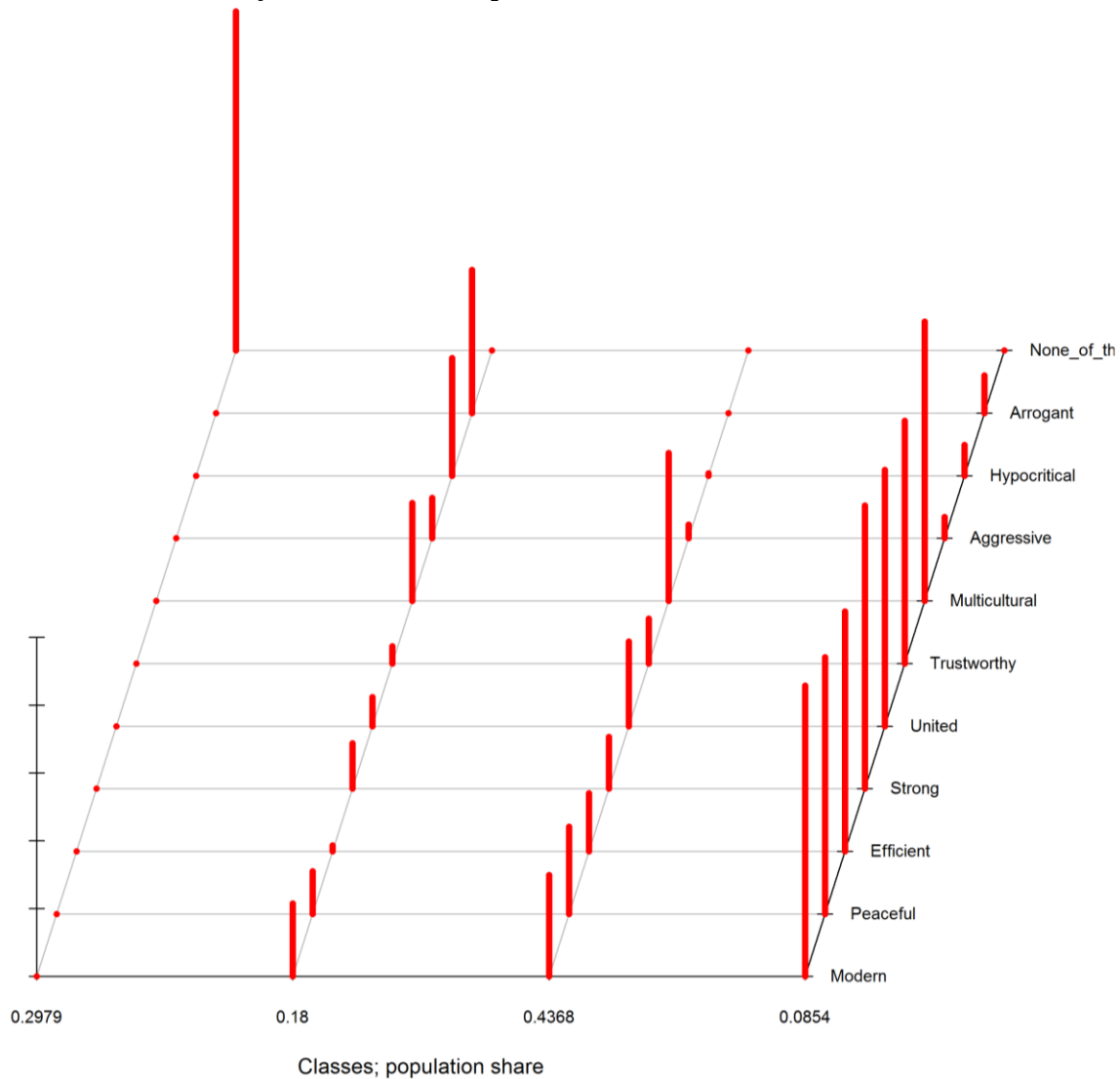
The general population in the US chose mostly positive descriptors of the EU, and were less likely to choose negative ones. Latent Class Analysis (LCA) allows dividing respondents into classes according to their likelihood of choosing specific descriptors in association with the EU. The LCA revealed four classes:

- Mostly positive but few descriptors – 44% (top 3: multicultural, modern, peaceful).
- Mostly positive and many descriptors – 9%.
- Mixed, but mostly negative – 18% (top 3: arrogant, hypocritical, multicultural). Respondents who stated to be sufficiently informed about the EU were more likely to fall into this class.
- No opinion on the EU and its descriptors – 30%.

Multicultural was a descriptor that was seen ambiguously – in some cases it may have negative connotations, in others it's viewed positively. The LCA in Figure 12 shows to what extent

multicultural was used as a negative versus a positive descriptor – see the height of the multicultural bar in the 44% class (most to the right) compared that of the 18% class (second to right from the left). The former, which used almost exclusively positive descriptors, likely used multicultural to mean a positive descriptor, whereas the latter may have used it in either a negative or positive sense, as their descriptors were mixed between (mostly) negative and positive.

Figure 12. Latent class analysis of EU’s descriptions



Note: Based on the answers to public opinion survey Q2: Which of the following words, if any, do you think best describe each of the following countries and organisations? (N = 1007) The horizontal axis represents the share of the population falling into the class. The vertical axis represents the probability (ranging from 0 to 1) that a member of a given class chose the selected words to describe the EU.



As in all other 9 SP countries except in Russia, the general population in the US chose mostly positive descriptors of the EU, and was less likely to choose negative ones.

Looking comparatively at the descriptors respondents in the other Strategic Partner countries chose to describe the EU, the US population doesn’t stand out. The most common descriptors across the sample were multicultural, strong, efficient, modern, united and peaceful for all countries except Russia, where the top three were hypocritical, multicultural and arrogant.

[\[→ comparative overview \]](#)

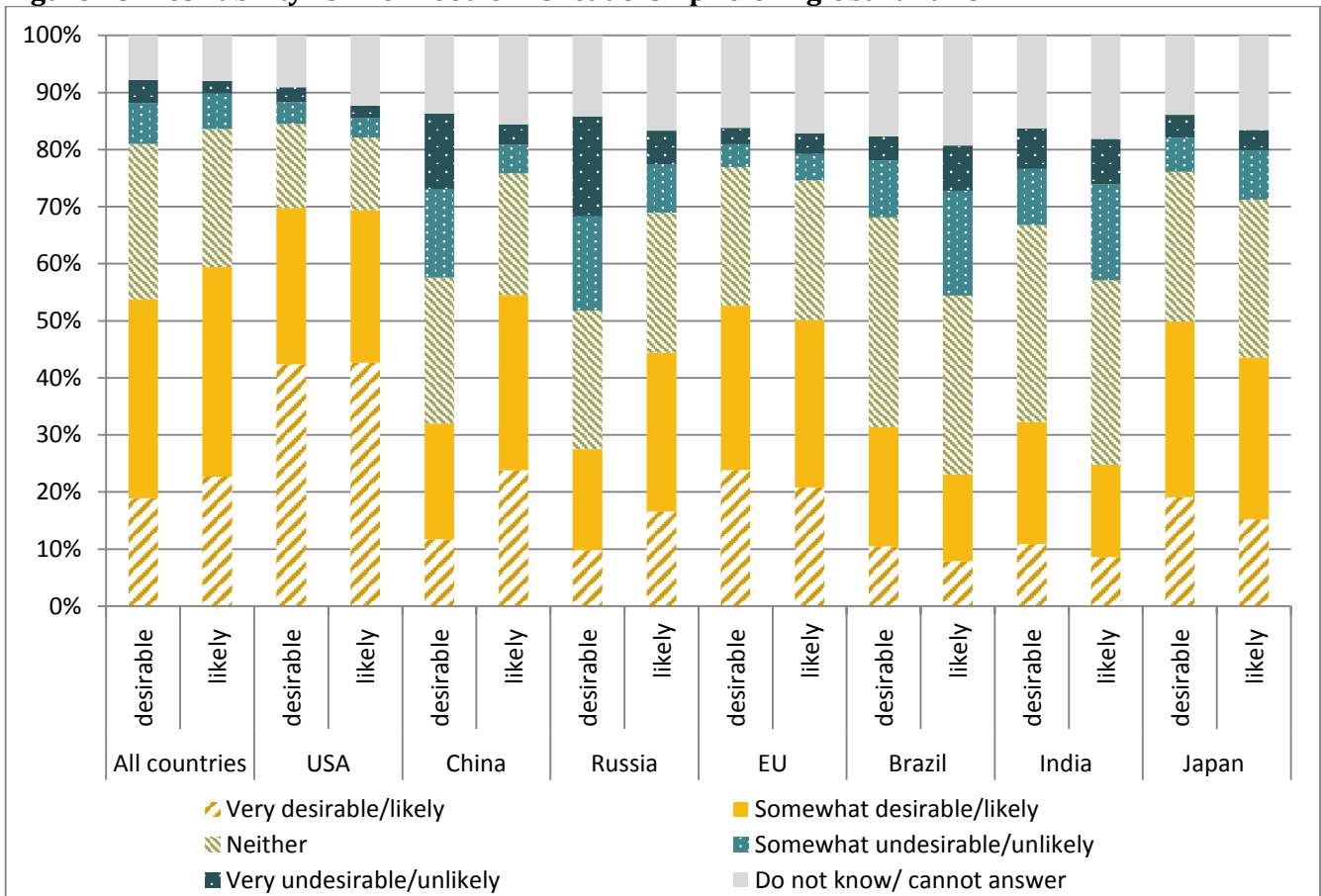
Effectiveness

Effectiveness in this study is measured by the public opinion poll, looking specifically at how well the population finds the EU to perform in a list of specified sub-themes in economy, trade, research and technology (Q13), political (Q15), social development (Q17), culture and sports (Q19) and normative themes (Q21). The findings show that US respondents found the EU to perform well across the listed areas, with some small differences among them, which are explored and visualized in Figures 13 – 18 below.

EU as a global leader

In terms of EU effectiveness in the global arena, the general public finds EU global leadership both desirable and likely. Looking at desirability of its leadership, the EU falls only behind the US itself, meanwhile regarding the likelihood of it assuming this role, EU slightly lags behind China as well.

Figure 13. Desirability vs likelihood of EU leadership role in global affairs



Note: Based on the answers to survey Q4. How desirable is it that each of the following countries and organisations take a strong leadership role in world affairs? and Q5. And, in your opinion, how likely or unlikely is it that each of the following countries or organisations will take a strong leadership role in world affairs five years from now? (N = 1007)

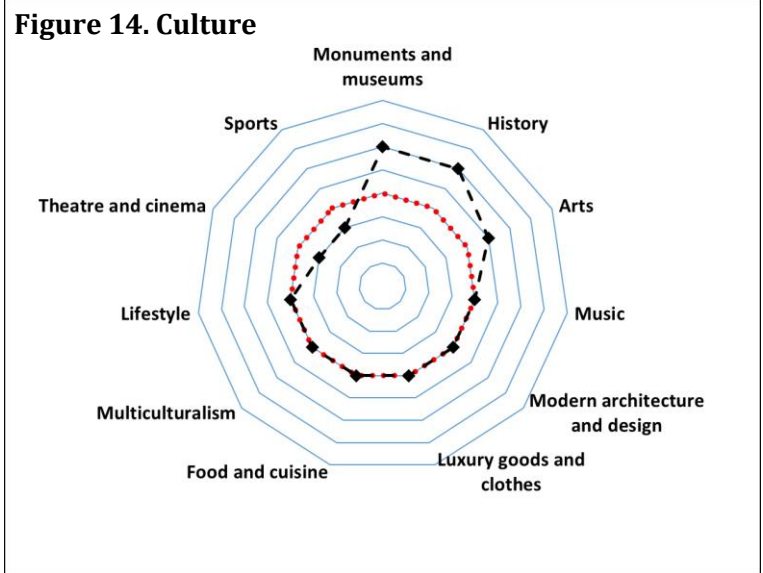


Looking comparatively at how desirable and likely EU global leadership is perceived across SP country publics, in the US EU leadership is seen as unlikely, more so only than in Japan, whereas in terms of desirability of EU leadership, it is seen as somewhat desirable, more so only than in Russia, Japan and South Korea.

[\[→ comparative overview \]](#)

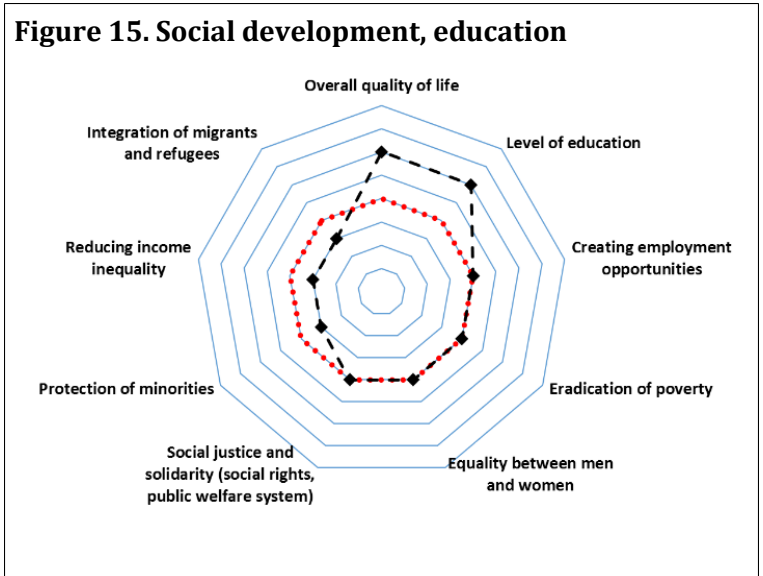
Culture

In the area of culture, the general public in the US had the most positive views towards the EU's effectiveness in terms of its monuments and museums as well as history. On the contrary, the theatre and cinema, as well as sports were less often viewed positively.



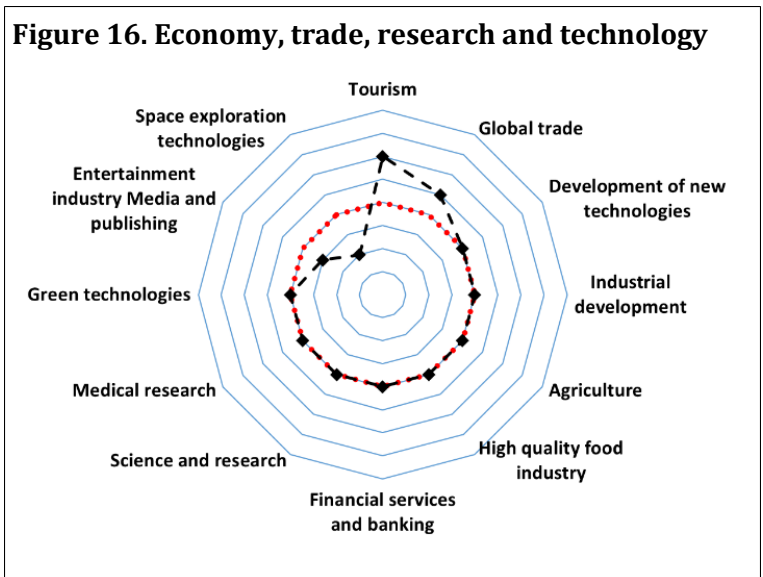
Social development and education

In the area of social development and education, US respondents had the most positive views regarding EU's performance in terms of education and quality of life. They expressed least positive views in terms of integration of migrants and refugees, reduction of income inequalities, and protection of minorities.



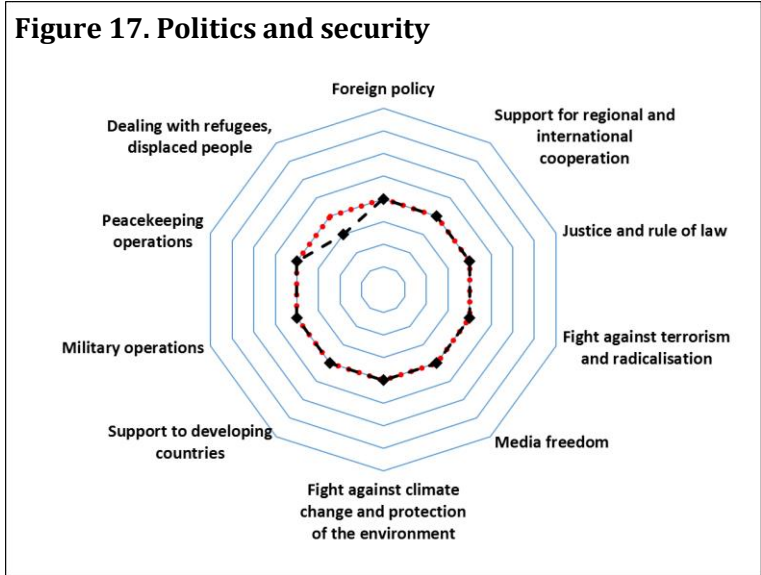
Economy and RS&T

In the area of economy and RS&T, respondents in the US were most positive about the EU's performance in the field of tourism and the least positive in space exploration technologies. Across the remaining fields, relatively more positive views were expressed in terms of EU's performance in global trade and relatively less positive views were expressed in terms of EU's performance in the field of entertainment industry media and publishing.



Politics and security

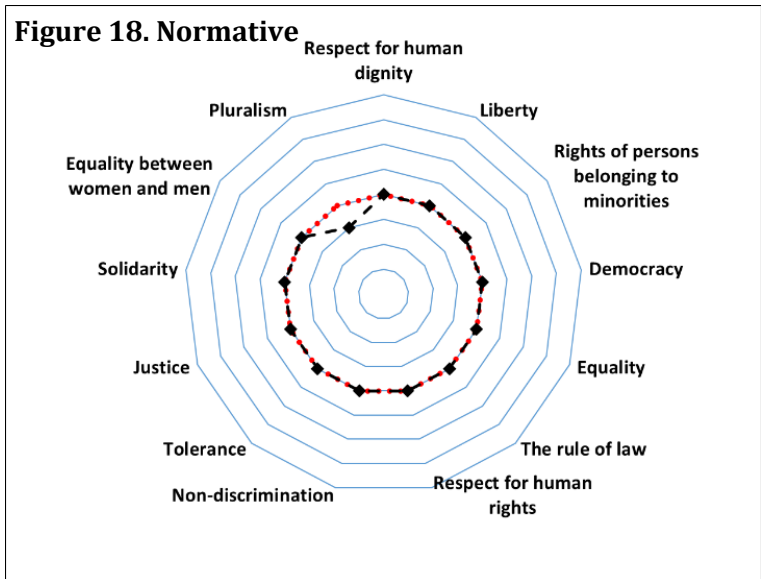
In the area of politics and security, US respondents have not evaluated EU's performance in any of the fields particularly positively relative to each other. However, slightly less respondents viewed EU's efforts in dealing with refugees and displaced people positively than they viewed EU's performance in the remaining fields.



Note: Figures 14 to 17 are based on the survey Q 13, 15, 17, and 19 (How well do you think the EU performs in terms of the following areas...) (N = 1007). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas the rings outside the red dotted ring are above the average.

Normative

Across different normative issues, US respondents reported that their views are similar to those of the EU on all of the listed issues. However, in terms of pluralism, slightly less respondents found similarity in their personal point of view with that of the EU's than in terms of any other normative issue.



Note: Figure 18 is based on the survey Q21: Thinking now about your own personal point of view on each of the following issues listed below. Please tell me for each, how similar are your views with respect to the views of European Union? (N = 1007). Each ring represents an approximately ±5 percentage points shift from the average number of positive answers (red dotted ring). Rings inside the red dotted ring are below the average, whereas, the rings outside the red dotted ring are above the average.

Explanatory criteria

Demographic (individual) characteristics

As revealed by the public opinion poll, various demographic characteristics (age, gender, income, working status and region of residence in the home country) of the population as well as personal connections to Europe (sufficiency of information received about the EU, contact with Europe) may account for differences in perceptions of the EU. As concerns **age**, younger respondents hold somewhat more positive views on the EU in general, and within specific thematic fields (EU's influence in economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress). In terms of **gender**, women have lower levels of awareness about the EU, and also less positive views on the EU, the US-EU relationship. Also they found the EU to be a less desirable and likely global leader, felt it is less attractive for its culture and lifestyle.

Higher **income** was also linked to more positive views generally and specifically across themes. However, education did not explain any differences in perception. **Working status** also featured among explanatory criteria – respondents who were employed at the time of the study had more positive views of the EU, the US-EU relationship, desirability and likelihood of EU's global leadership role and the attractiveness of its culture and lifestyle. Lastly, the **region of residence** accounted for some differences in perceptions – respondents from the Northeast and West were more positive about the US-EU relationship and find the EU to be a more desirable global leader.

As concerns personal connections to Europe, the extent to which respondents felt they receive sufficient information on the EU, as well as contact with EU, whether through having lived in or visited the EU and/ or having relatives living there, were also predictors of perceptions. Both, respondents that feel they have **sufficient information on the EU**, and have had **contact with Europe**, reported having more positive views of the EU, the US-EU relationship, found the EU to be a more desirable and likely global leader, and more attractive for its culture and lifestyle. Moreover, contact with Europe and perceived sufficiency of information received about Europe accounted for better perceptions of EU's influence in different themes (EU's influence in economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress).

Table 1. Demographic and familiarity with Europe predictors of perceptions

	Awareness of EU	General view of EU	US-EU relationship	EU attractiveness	EU leadership (desirable)	EU leadership (likely)	EU influence across themes
Gender	Women ↓	...	Women ↓	Women ↓	Women ↓	Women ↓	...
Age	...	Younger ↑	...	...	...	...	Younger ↑
Contact with Europe	...	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑	With contact ↑
Sufficiently informed	...	More informed ↑	More informed ↑	More informed ↑	More informed ↑	More informed ↑	More informed ↑
Income	...	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	Higher income ↑	...
Level of education
Working status	...	Employed ↑	Employed ↑	Employed ↑	Employed ↑	Employed ↑	...
Region	Northeast, West ↑	...	Northeast, West ↑	Northeast, West ↑	...

Note: Based on the answers to survey Q1 (Awareness of the EU and General view of the EU); Q12 (EU attractiveness); Q3 (Desirability of EU leadership); Q4 (Likelihood of EU leadership); Q6-11 (EU influence across themes: economic affairs, global peace, anti-climate change, development cooperation, defending human rights and advancing innovation and technological progress) (N = 1007). Statistical analysis showed only weak associations between perceptions of respondents and their demographic characteristics. This means that relationships between answers to survey questions and chosen demographic characteristics (as shown in the table above) are statistically significant, but differences in answers to survey questions across different demographic groups are not sharply marked.

Qualitative findings of variables explaining EU perceptions

Besides the quantitative data gathered via the public opinion poll, the study at hand analysed various sources of qualitative information, including a review of literature on EU perceptions and key Public Diplomacy initiatives of the EU, as well as elite interviews with media representatives, youth, academia, policy makers and EU delegations in each of the 10 SP countries. These sources inform what structural (as opposed to demographic characteristics of individuals) explanatory criteria may be at play when accounting for differences in perceptions. Such criteria include culture, history, political and geopolitical context and economic interdependence. In the figure below we present examples of voices from interviews, presenting American views of the EU/ Europe and trying to explain them by referring to various structural factors.

Figure 19. Structural explanatory criteria

