

The logo for Rainbow, featuring a stylized white 'R' icon followed by the word 'rainbow' in a white, lowercase, sans-serif font. The logo is positioned on the left side of the slide, overlaid on a large, semi-circular graphic with a rainbow gradient from orange at the top to blue at the bottom.

Rainbow

European Pillar of Social Rights 1st Interim Survey Results

Objectives of the Survey Results report

I. CAMPAIGN ACTIVITY OVERVIEW



A reminder of **campaign objectives, scope and activities**

II. CAMPAIGN PERFORMANCE ANALYSIS



Overview of key performance data sourced from the post-campaign survey with a focus on **awareness, campaign recall, understanding, and empowerment** (including **opinion, perception, change (participation), and trust**)

III. SUMMARY & RECOMMENDATIONS



Summary of **key takeaways and recommendations.**



Section 1: Campaign overview

A baseline survey was carried out between **24th of February and 31st of March 2023** with as purpose to ascertain baseline levels among five audience groups with very positive, positive, and neutral views of the EU in the **27 EU Member States**.

In order to measure the DG EMPL campaign's impact among the EYS (European Year of Skills) target audiences in a selection of **12 countries, focusing on the SKILLS topic**.

The 1st interim survey took place on **19th December 2023 to 19th January 2024**.

Main objective:

To measure the campaign's **impact** among the EYS (European Year of Skills) target audiences in a selection of **12 countries**, focusing on the **SKILLS** topic.

Target audiences:

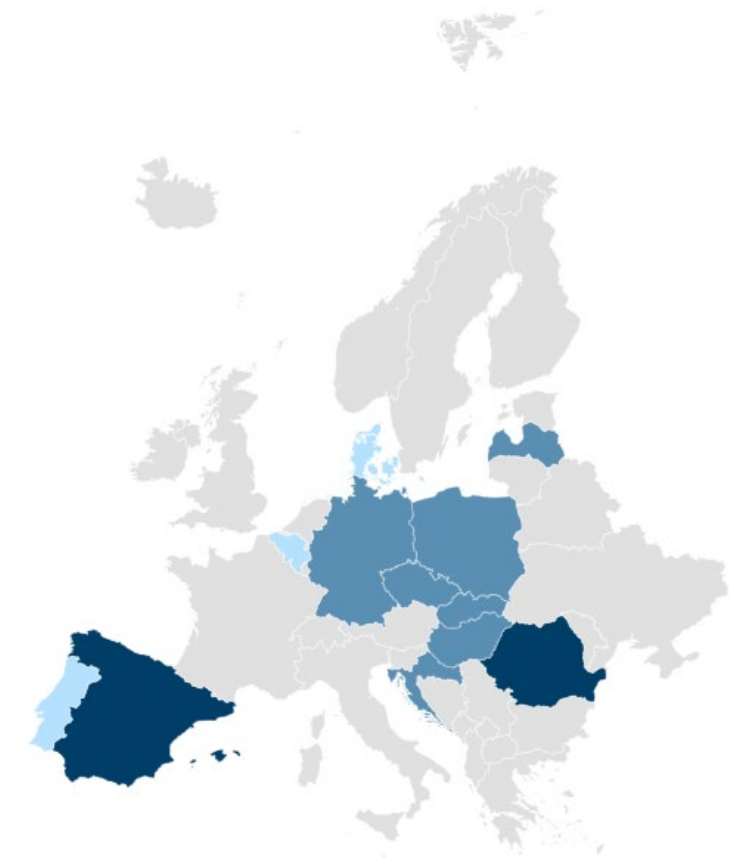
- Professionals, focus on age group 18-40
- Jobseekers, focus on age group 18-50
- Employers in small or medium -sized businesses, focus on age group 25-60
- NEETs, focus on age group 18-35

Countries:

- ▶ 2 of 5 tier 1 countries (high need): Romania, Spain
- ▶ 7 or 13 tier 2 countries (medium need): Croatia, Czechia, Germany, Hungary, Latvia, Poland, Slovakia
- ▶ 3 of 9 tier 3 countries (low need): Belgium, Denmark, Portugal

Fieldwork:

19th December 2023 to 19th January 2024



■ High need ■ Medium need ■ Low need

Key objectives:

- ▶ **Promote** effective and inclusive investment into training and upskilling.
- ▶ **Strengthen** skills relevance to match the identified gaps.
- ▶ Match people's aspirations and skills sets with **labormarket opportunities**.
- ▶ **Attract** people from third countries with the skills needed by the EU.

Duration:



Key campaign activities & channels – reminder

Assets



- Campaign videos



- GIFs



- Statics (only for testing purposes, in a selection of 3 countries)

Channels



TV



YouTube



Facebook



OOH
(Brussels)



SEA



Instagram



Twitch



Section 2: Survey methodology

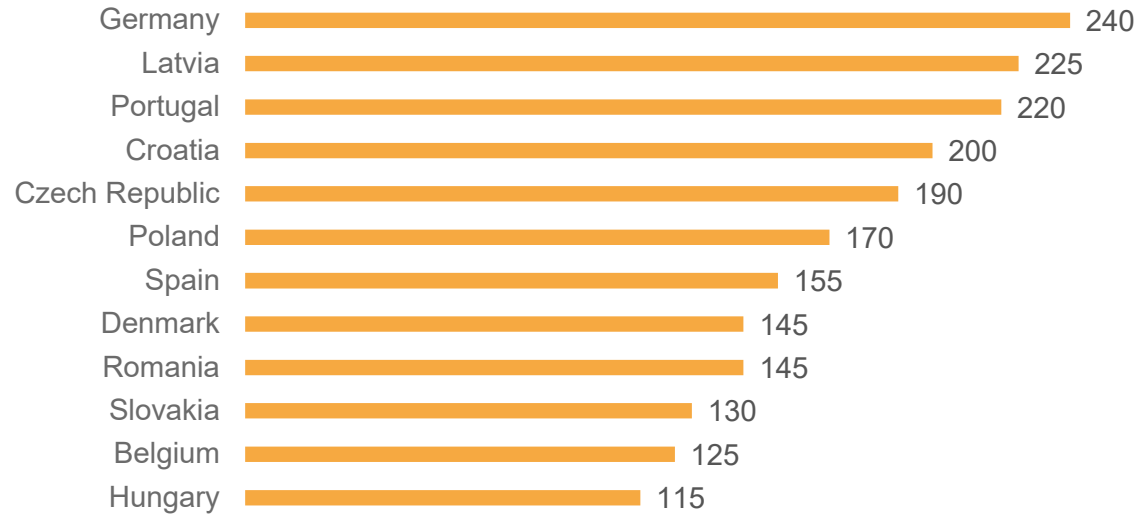
The survey dedicated to the SKILLS topic measured...

- ▶ **Campaign recall** – assesses the extent to which the survey participants are able to recall seeing/reading about/hearing about the campaign.
- ▶ **Awareness** – explores the extent to which survey respondents were aware that the EU is promoting actions to develop skills needed in the job market.
- ▶ **Perception** – understands survey respondents' perceptions of the importance and benefits of what the EU does to promote skills.
- ▶ **Participation** – measures respondents' intention to participate in upskilling and reskilling.
- ▶ **Relevance** – understands survey respondents' perceptions of the relevance of what the EU does with regards to promoting skills.
- ▶ **Trust** – measures the trust in the EU as an actor of social change, in prompting employment and social situation, in improving lives, and to support respondents.

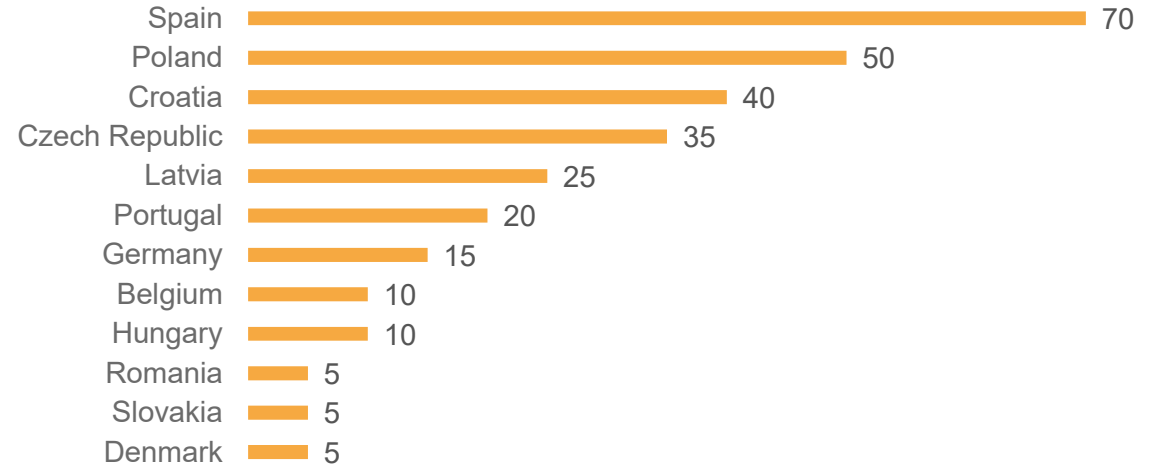


Proposed survey sample

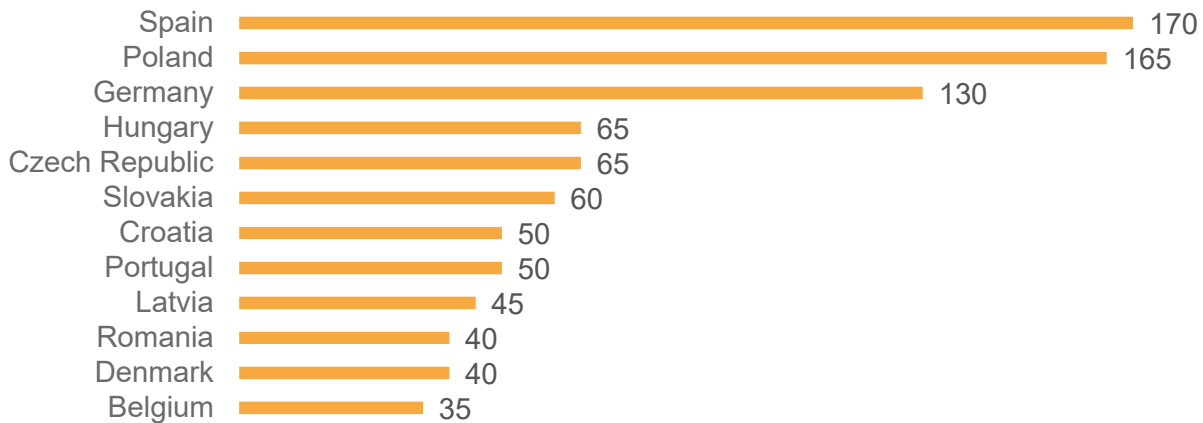
Professionals



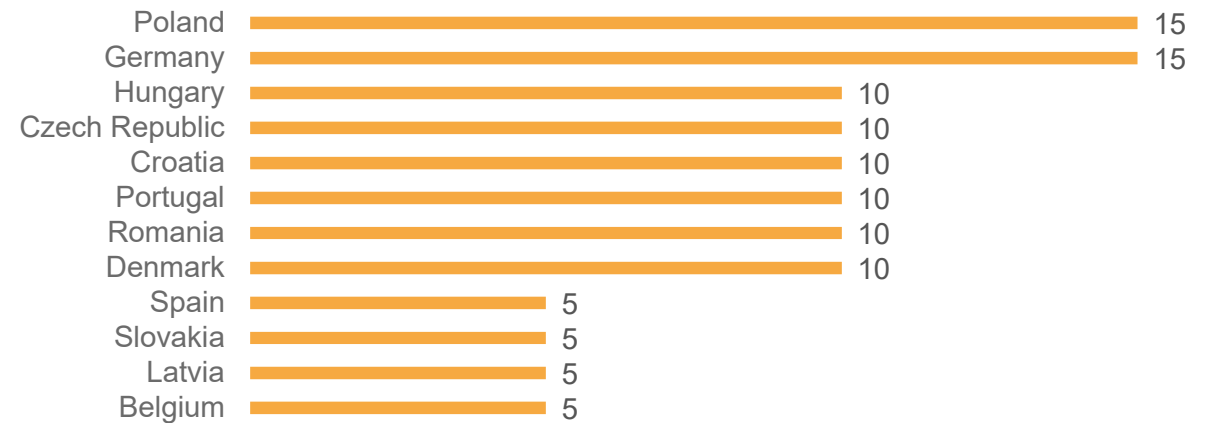
SME Employers



Jobseekers



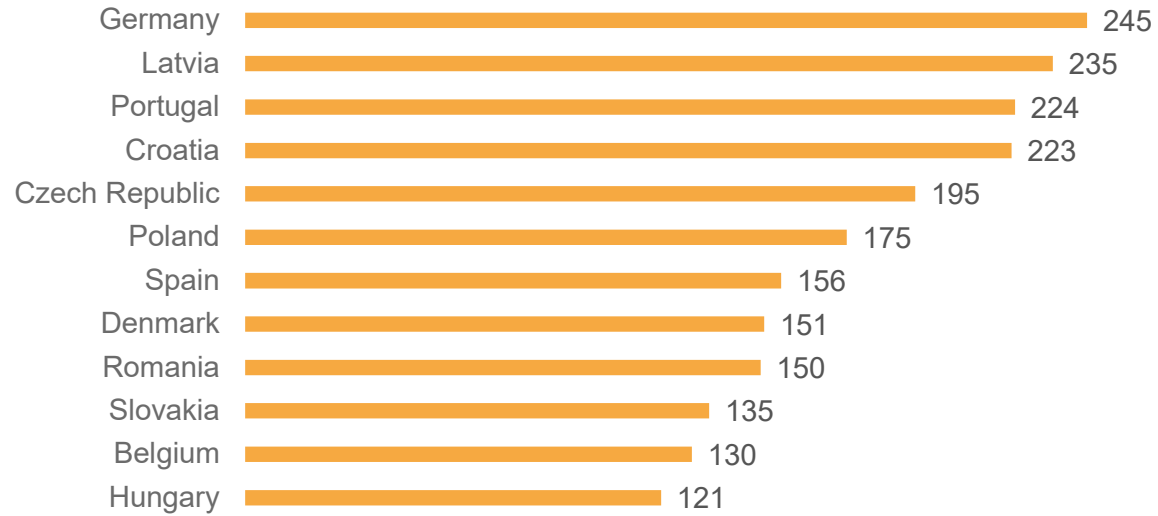
Jobseekers



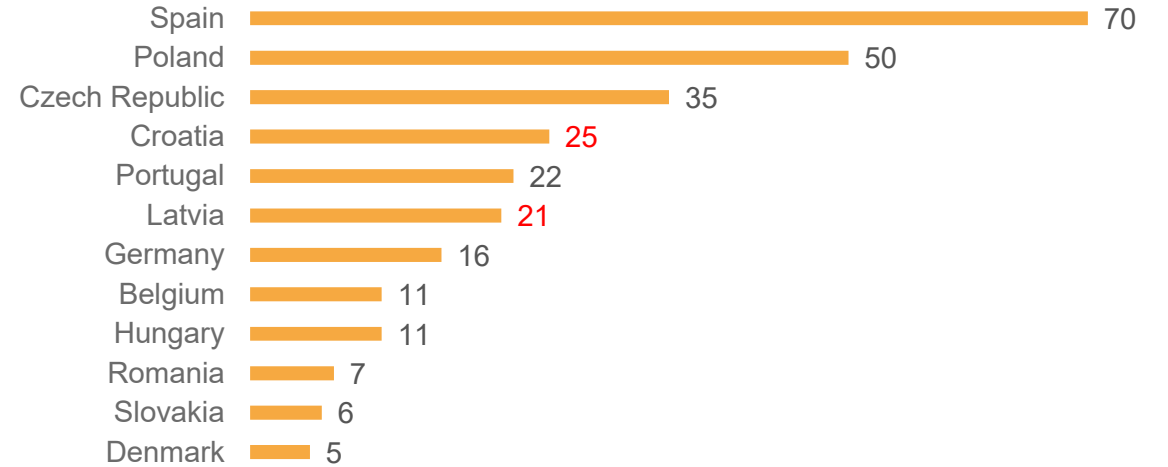


Post-campaign survey sample

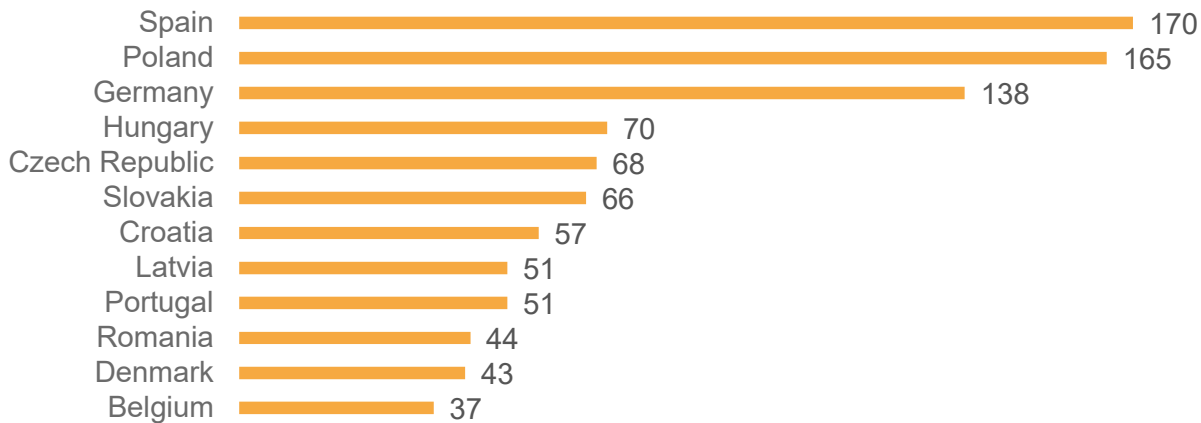
Professionals



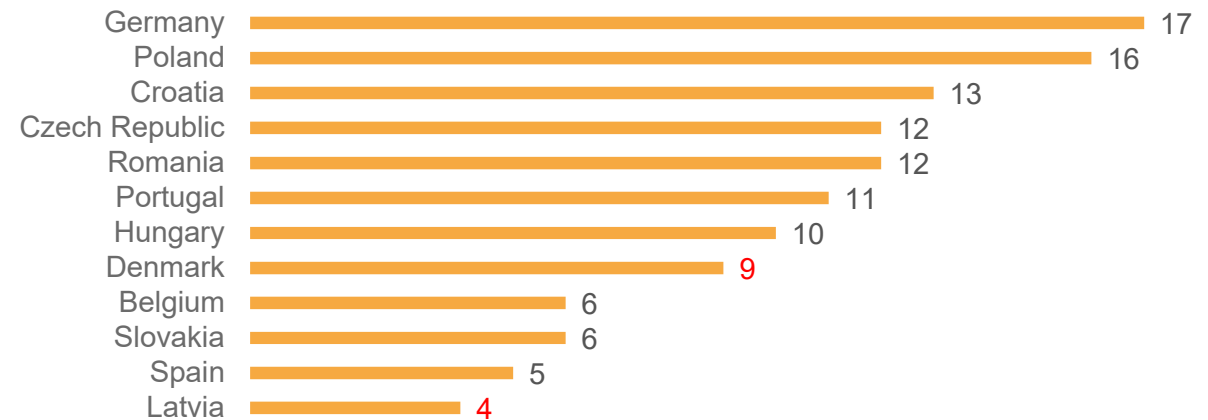
SME Employers



Jobseekers



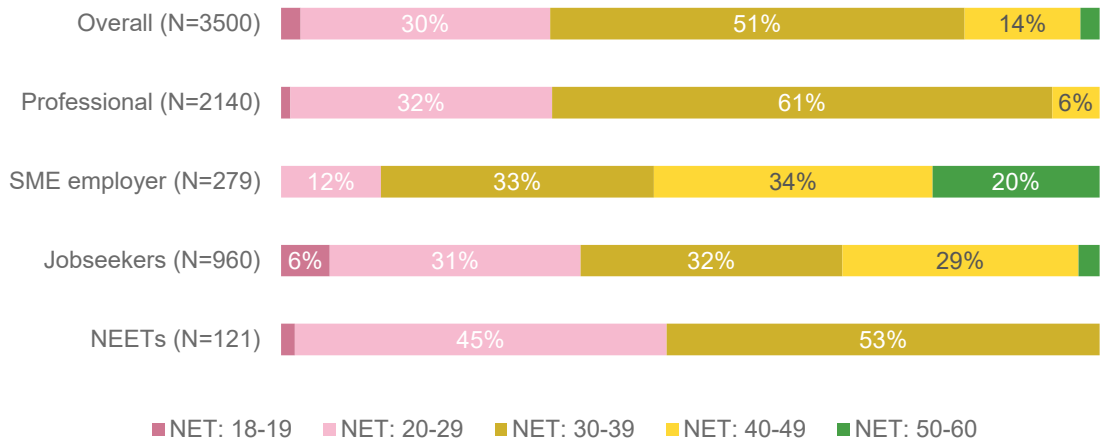
NEETs



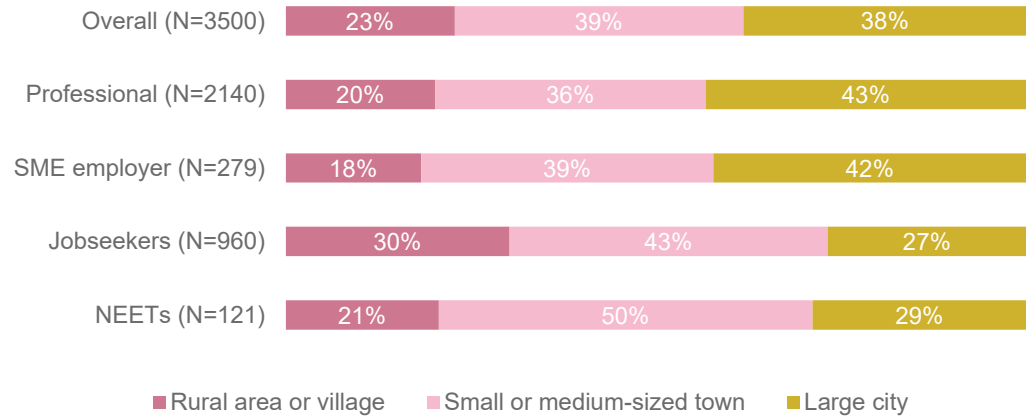


Post-campaign survey sample

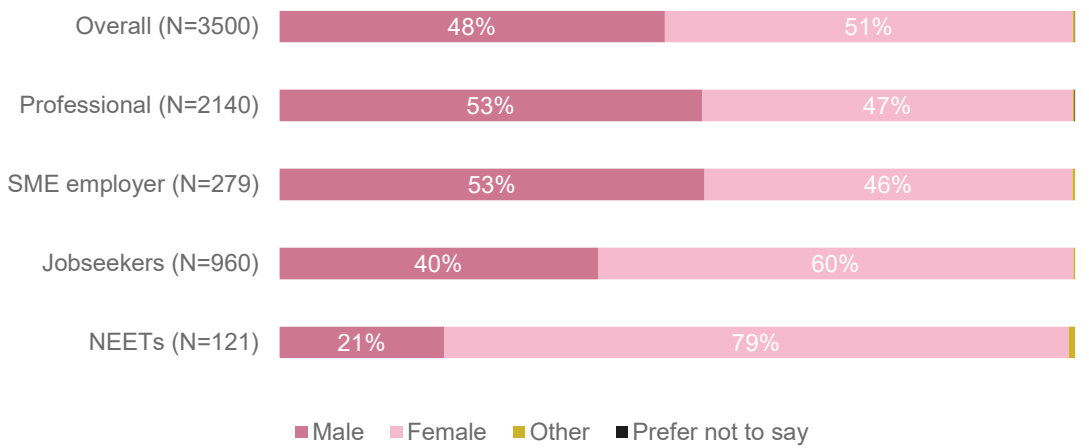
Age



Population density



Gender



Education

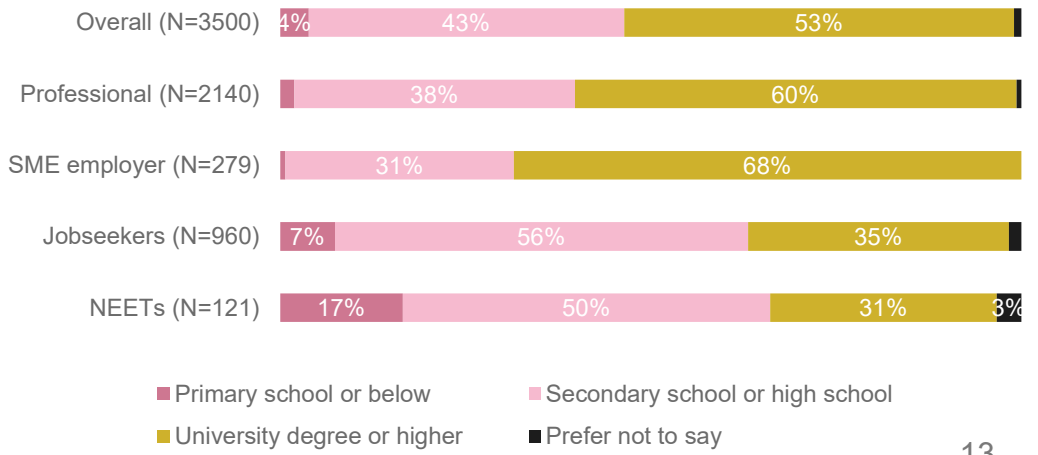
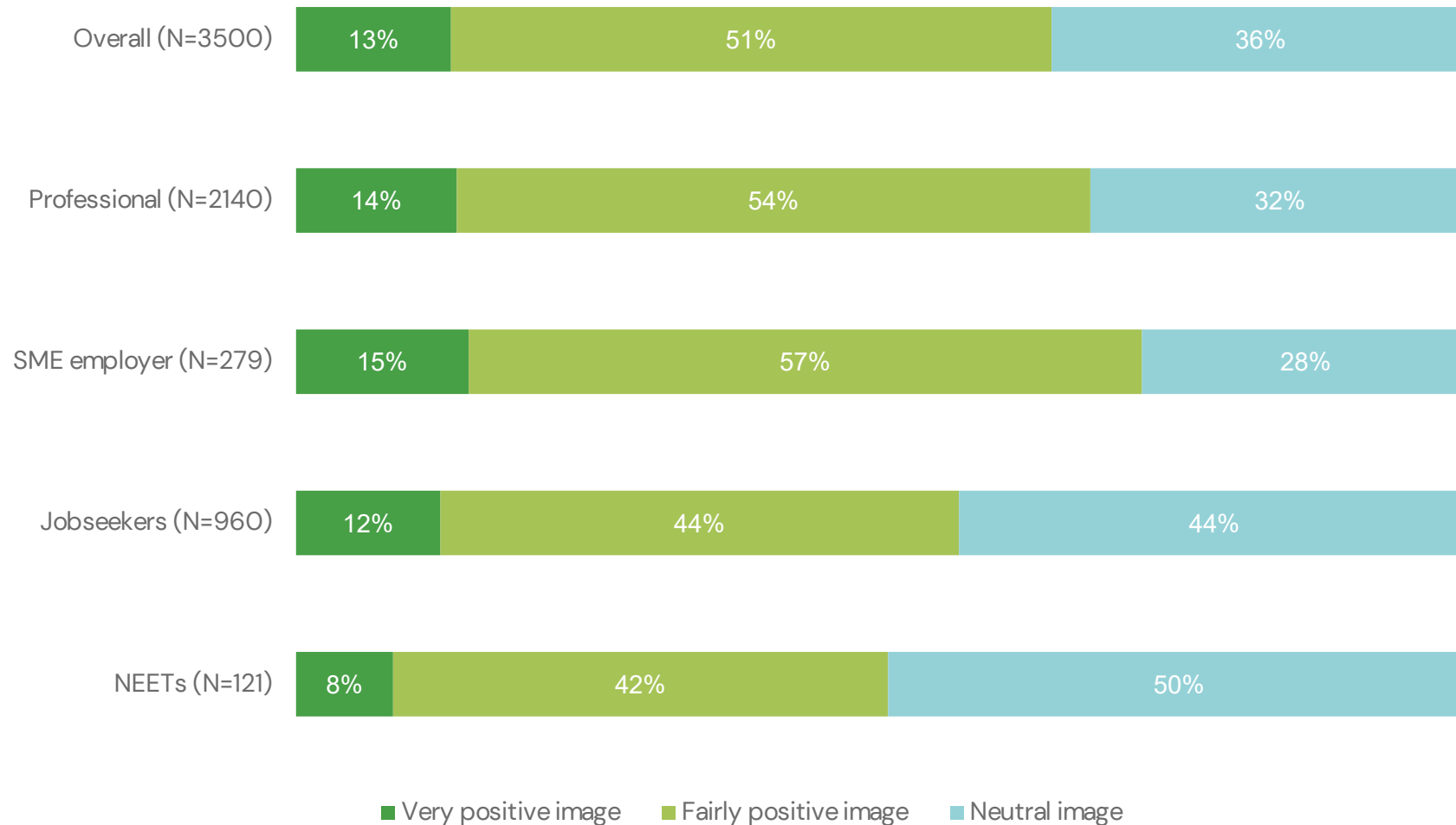




Image of the EU



- As during the baseline survey, respondents with a negative or very negative image of the EU were **disqualified from the survey**.
- As during the baseline, NEETs had a positive image of the EU than other interviewed groups, but we notice a slight **increase of 4%**. In general, the image of EU remained more or less the same (very slight increase in neutrality).



- Throughout the survey analysis, we have divided respondents into **two main groups** – “Exposed” and “Not exposed”.
 - **Exposed: respondents who** have heard/seen something about the campaign and were able to recall at least one asset.
 - **Not exposed:** respondents who did not state the above.

Exposed vs Not exposed

Target group	Overall	Professionals	SME Employers	Jobseekers	NEETs
Total count	3500	2140	279	960	121
Exposed to campaign count	678 (19%)	453 (21%)	77 (28%)	137 (14%)	11 (9%)
Not exposed to campaign count	2822 (81%)	1687 (79%)	202 (72%)	823 (86%)	110 (91%)



Section 3: Key findings



Key findings

- In general, we can conclude that the campaign has been a **success on all KPI's**. People exposed to the campaign show greater awareness, understanding and trust regarding the initiatives regarding skills that the EU has undertaken.
- This is true for **all the identified target groups**, even the difficult to reach target groups: NEETs & Job seekers were on a similar level than the Professionals and the SMEs.
- As concluded in the baseline study, the most efficient channels seem to have been identified while communicating a **relatable message**.
- Be aware that the exposed NEETs only have a sample size of 11, which is **very low**.



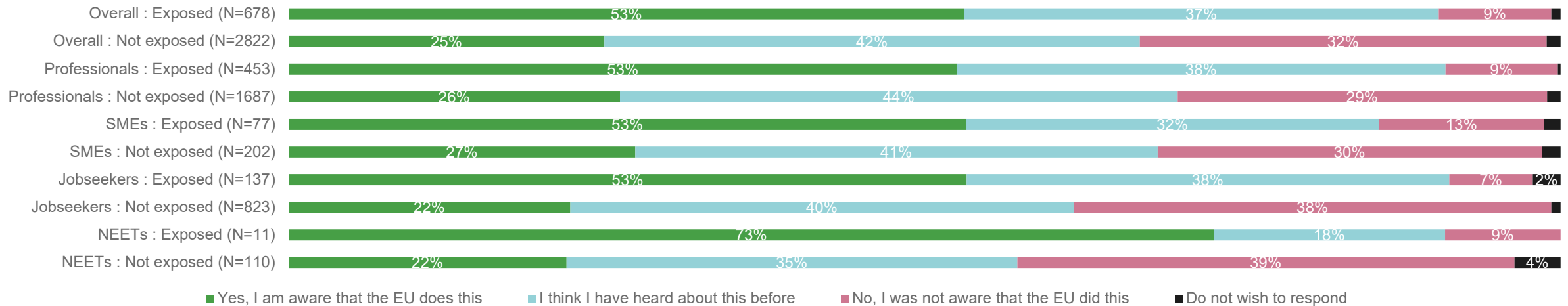
Section 4: Survey analysis

Section 4.1: Awareness

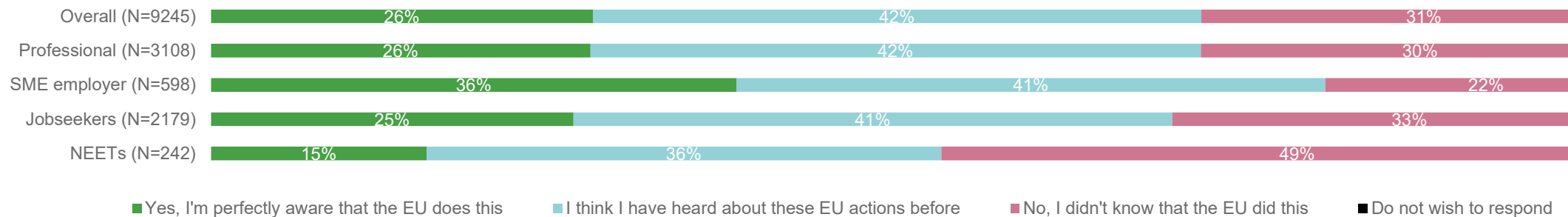
- We notice that exposure has an immediate impact on the awareness regarding the EU's actions on skill development. Especially the **NEETs** showed a **substantial increase in awareness** at 73% while other target groups were around 53%. The **unexposed** followed the **trend of the baseline survey** with even a strong **decline** in awareness among the **SMEs** (27% vs 36%)
- Exposure directly correlates with a **higher awareness** of ones rights again with a substantial increase for the NEETs, the group who was shown to be the most vulnerable during the baseline survey.

Section 4.1: Awareness

Are you aware of the following?:
The EU is promoting actions to develop skills needed in the job market

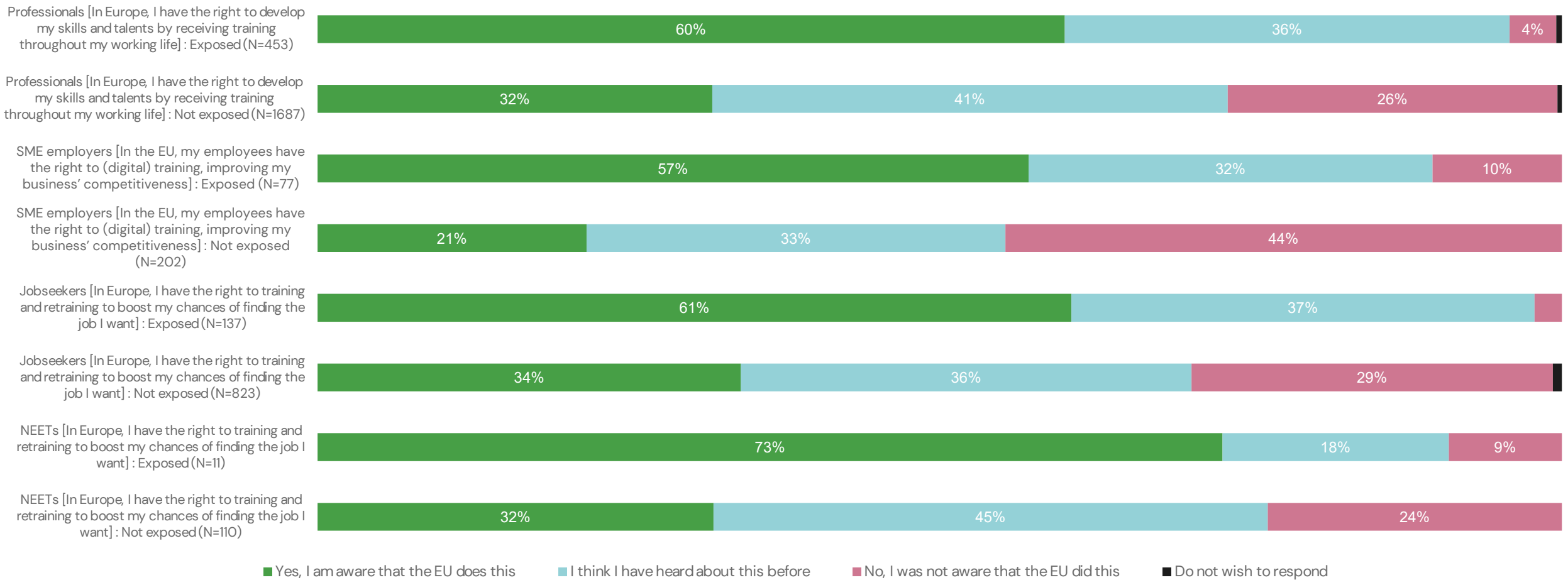


Baseline survey



R Section 4.1: Awareness

Awareness of rights

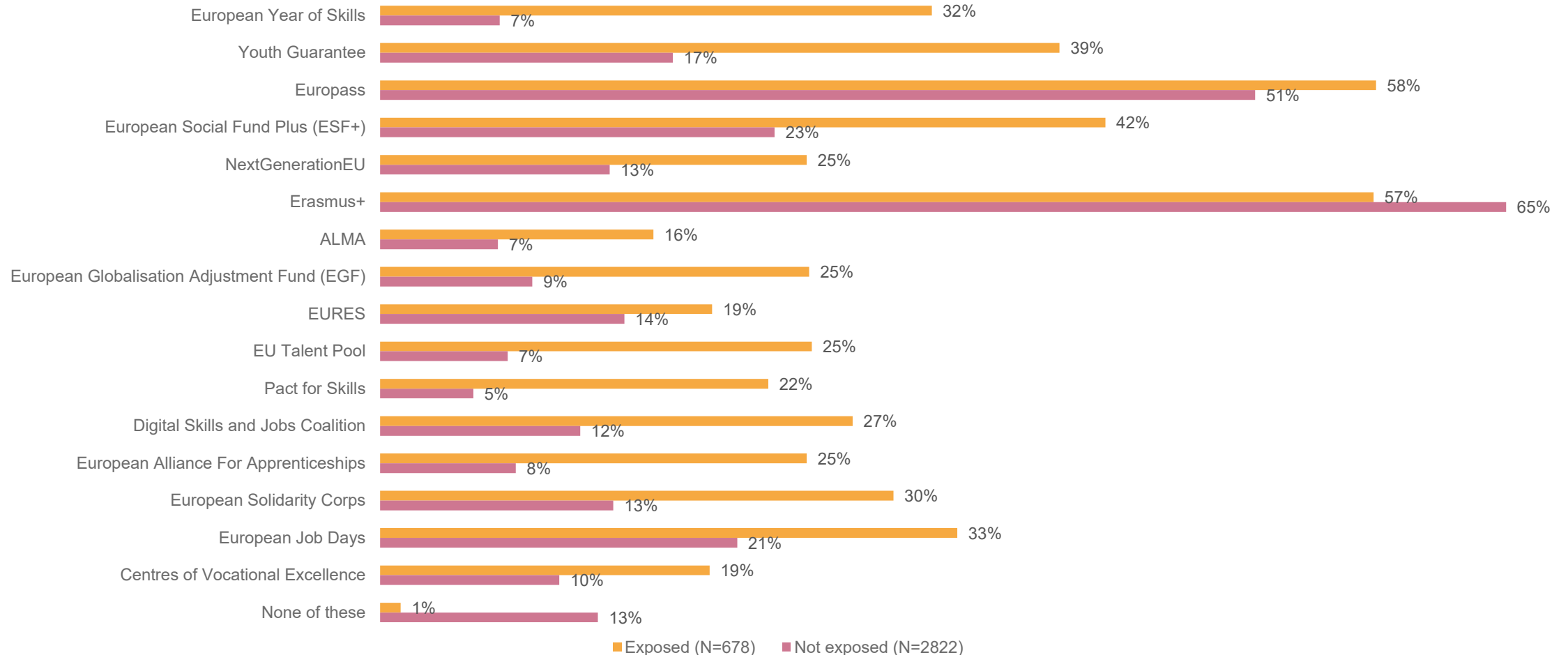


Awareness of European Year of Skills

- Among the exposed, **1 in 3** claim having heard about the European Year of Skill. Only 7% of the unexposed claim to know it.
Again, **exposure is key**.
- Europass is **well known** in general and surprisingly, **Erasmus+** is better known by the unexposed than the exposed (65% vs 57%)

Section 4.1: Awareness

Which of the following have you heard before?





Section 4.2: Recall

- **35% of the SMEs**, who, according to the baseline survey, already appeared to be well informed, remember seeing, hearing, or reading anything about the EU and skills in the last few months. They also had a better recall of the logo (26%), animation and videos (35% & 28%)
- Unfortunately, the **NEETs** had **the lowest recall** on EU and Skills (16%), the logo (14%), the animation (17%) and the videos (FJ: 18%, Eng: 25%, Des: 14%) . But as we have seen in the previous results, they had a better recollection of what they heard/saw. The other target audiences **averaged** in between.



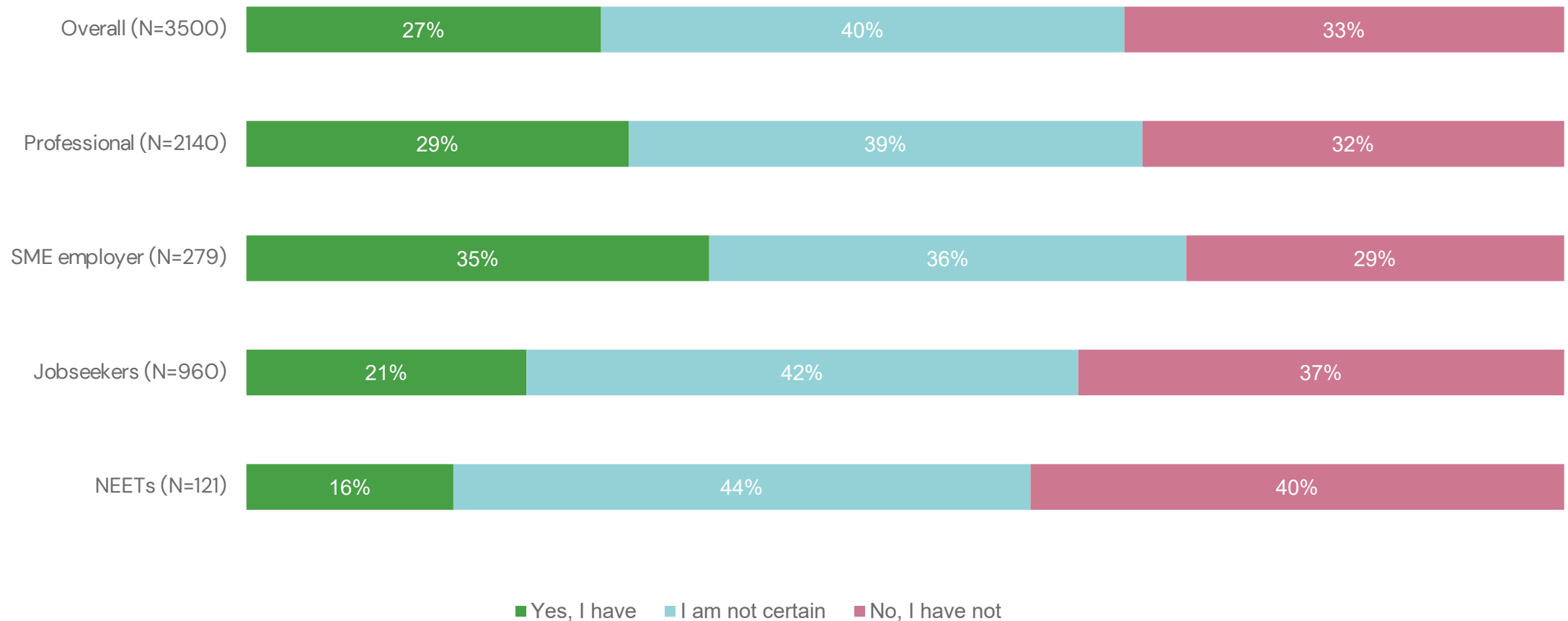
Section 4.2: Recall

- The Twitch assets recall was **rather low**, ranging between 8% and 12%.
- When asked where the respondents remembered learning about the European Year of Skills and the Make it Work campaign, we notice that **social media** (Facebook (Ex: 47%; N-Ex: 23%), **Instagram** (Ex: 47%; N-Ex: 23%), **YouTube** (Ex: 56%; N-Ex: 34%) and its **influencers** (Ex: 37%; N-Ex: 39%) are the main sources of information for all target groups.



Section 4.2: Recall

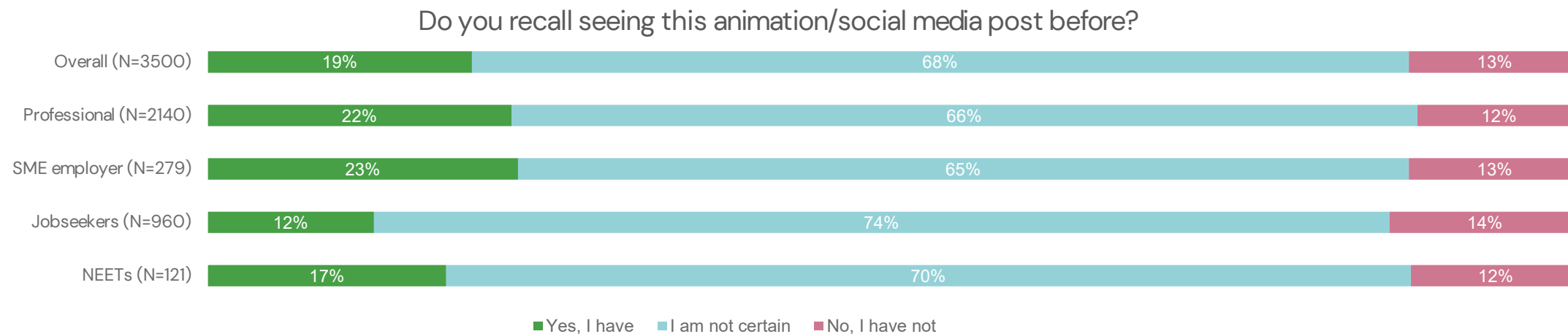
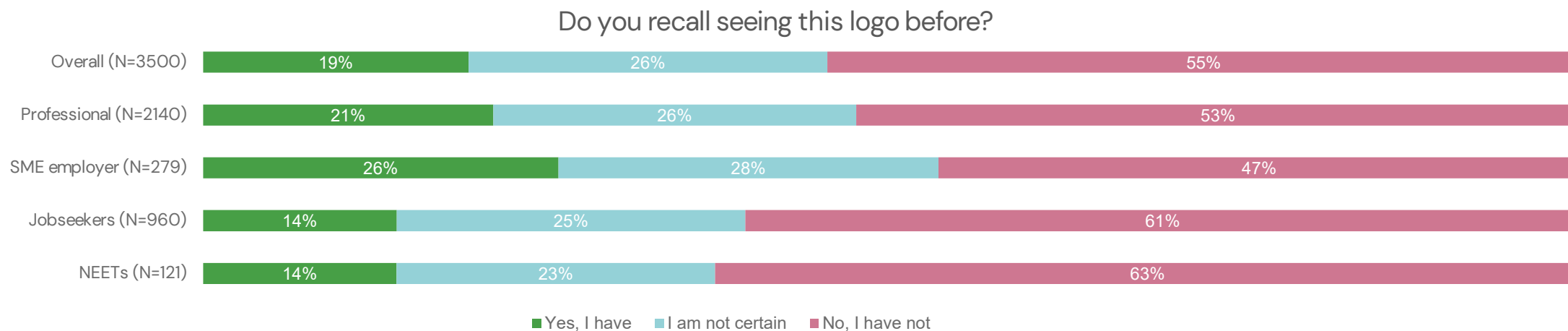
Seeing, hearing, or reading anything about the EU and skills in the last few months





Section 4.2: Recall

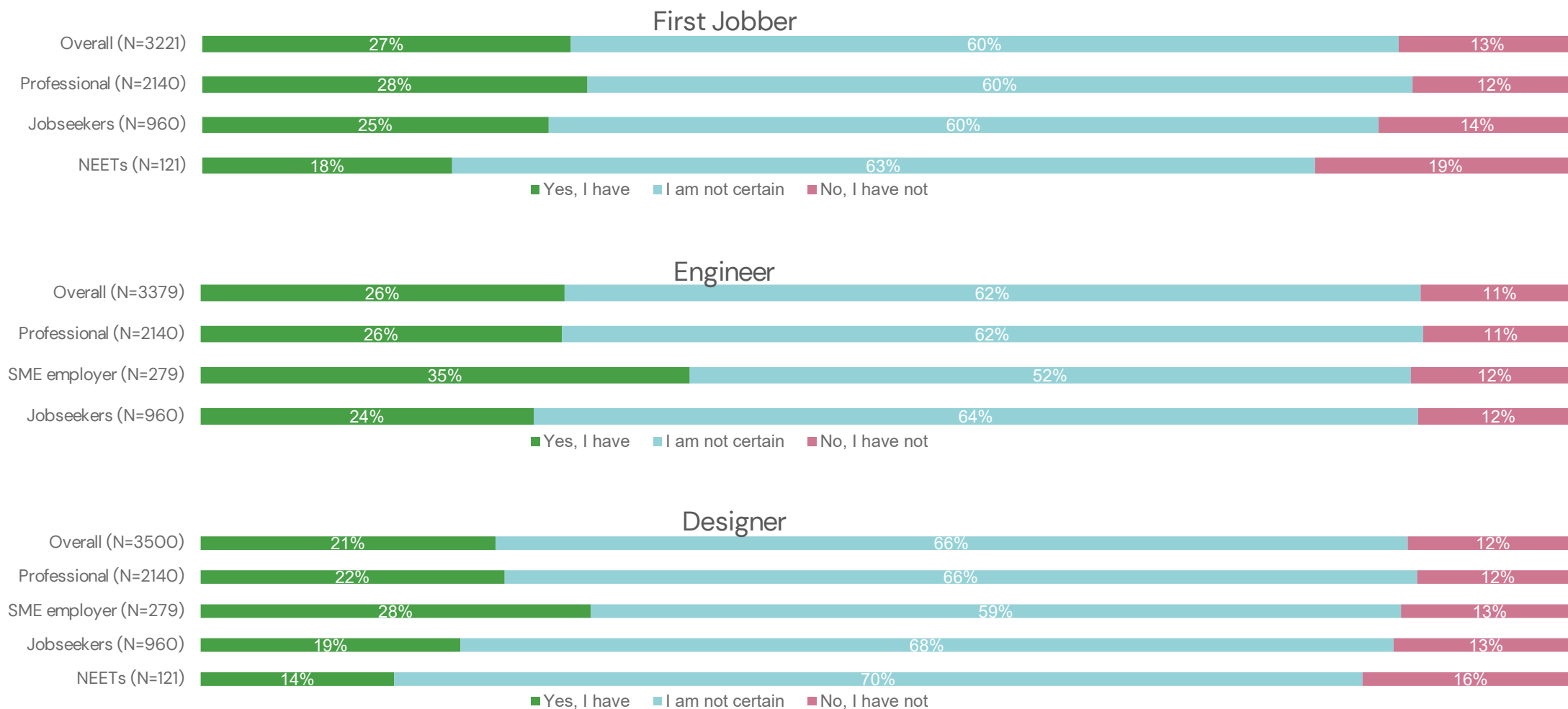
Recall of logo and the animation





Section 4.2: Recall

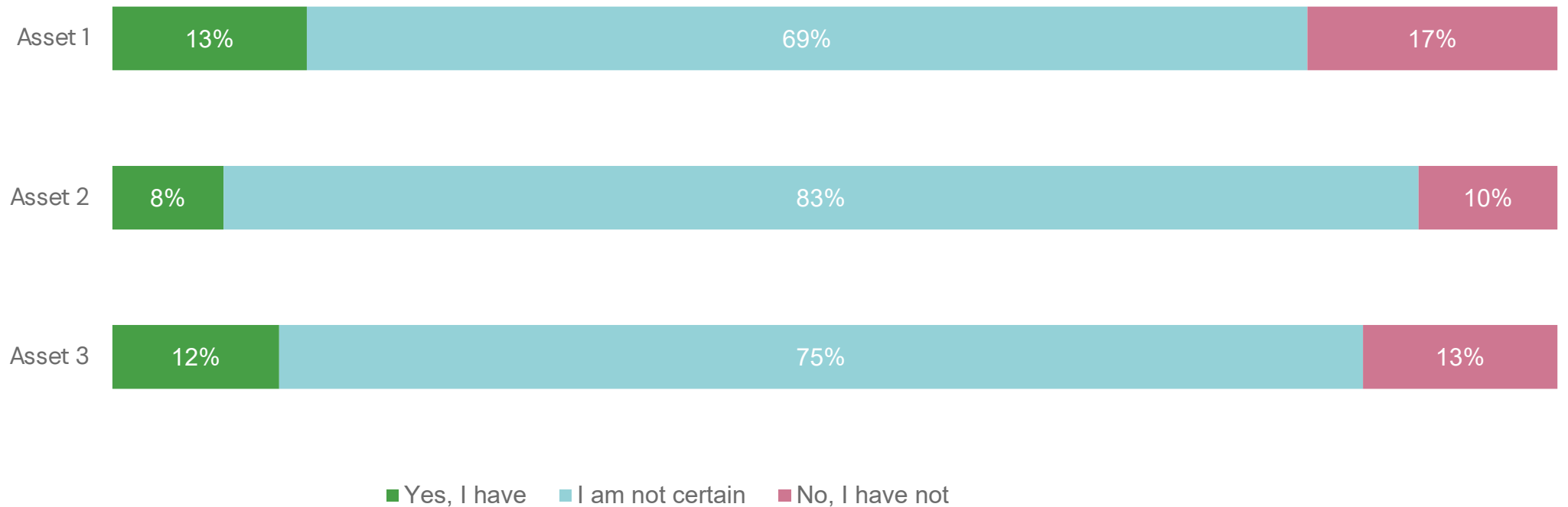
Recall of videos





Section 4.2: Recall

Recall of Twitch assets (N=52)

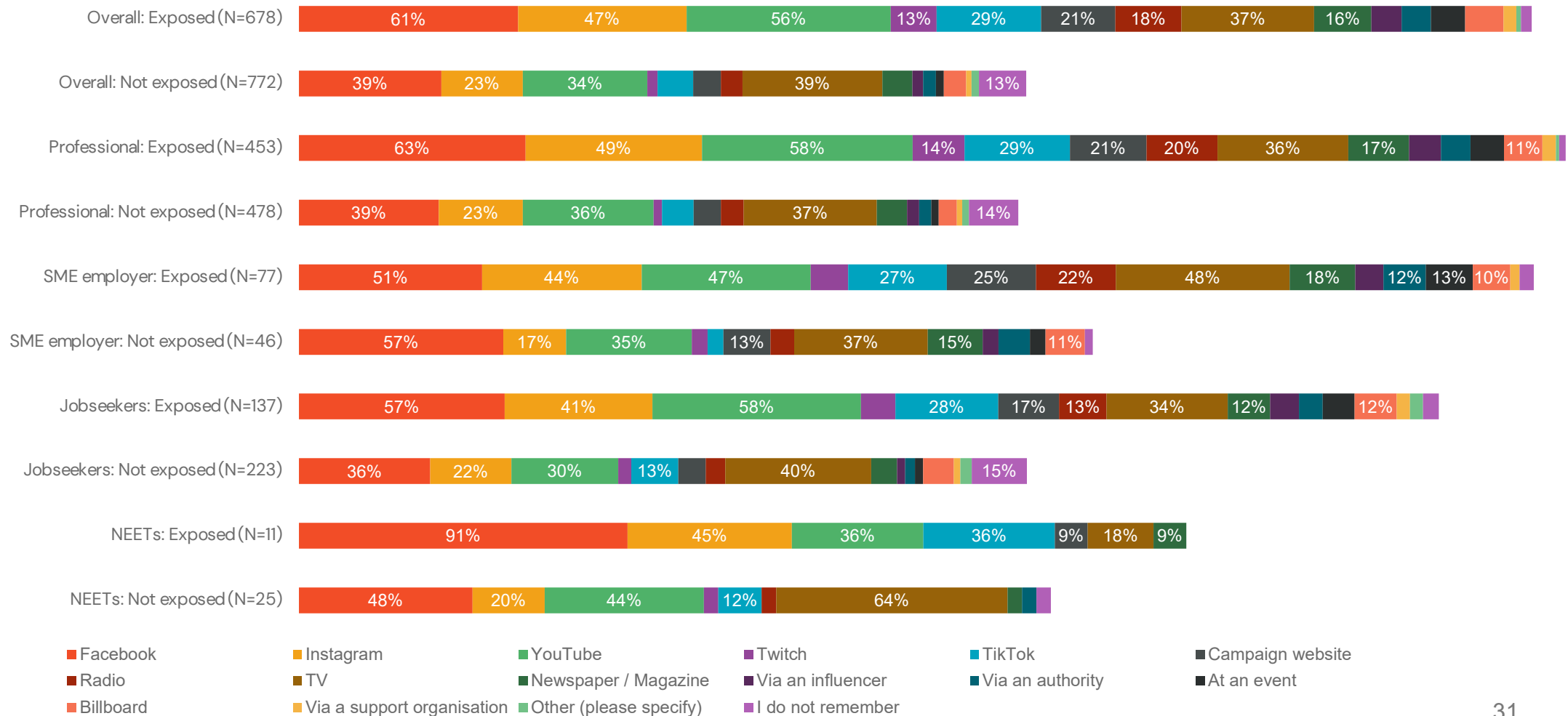


Asset 1: Andy – Asset 2: Ana – Asset 3: Oliver



Section 4.2: Recall

Where did you learn about the European Year of Skills and the Make it Work campaign?



Section 4.3: Understanding

- All target audiences majorly agree that the message of the campaign is **clear**.
For the animation: 2/3 of the respondents **understood the message**.
- For the videos, we notice a **slight difference in understanding**.
First Jobber succeeded better in communicating its message (74% (strongly) agree) in comparison with the Engineer (60% (strongly) agree) and the Designer video (67% (strongly) agree)).
This trend was true for all target audiences.



Section 4.3: Understanding

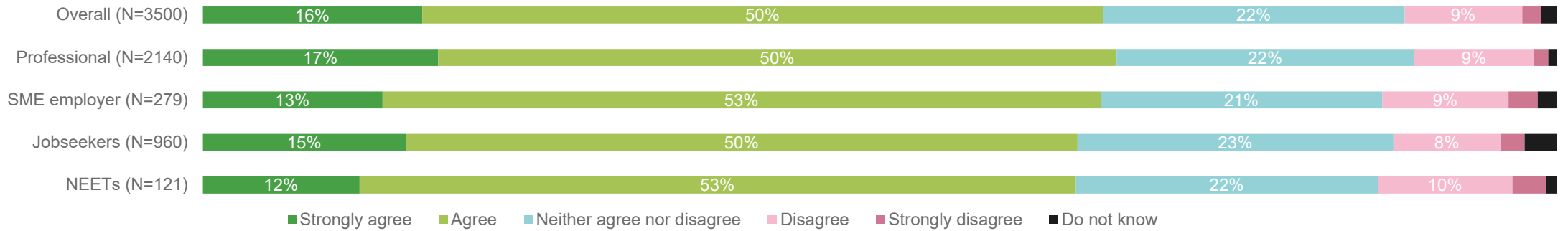
- There is also a discrepancy between the Twitch assets with **Asset 3**: Oliver, the ice cream taster (69% (strongly) agree) as being **the clearest** (Asset 1: Andy, the golf ball diver: 52%; Asset 2: Anna, the drone operator: 52%).
- Whether respondents thought the message was **authentic**, highly correlates with the **clarity** of the message. The higher the clarity, the bigger the chance of someone finding the message authentic.



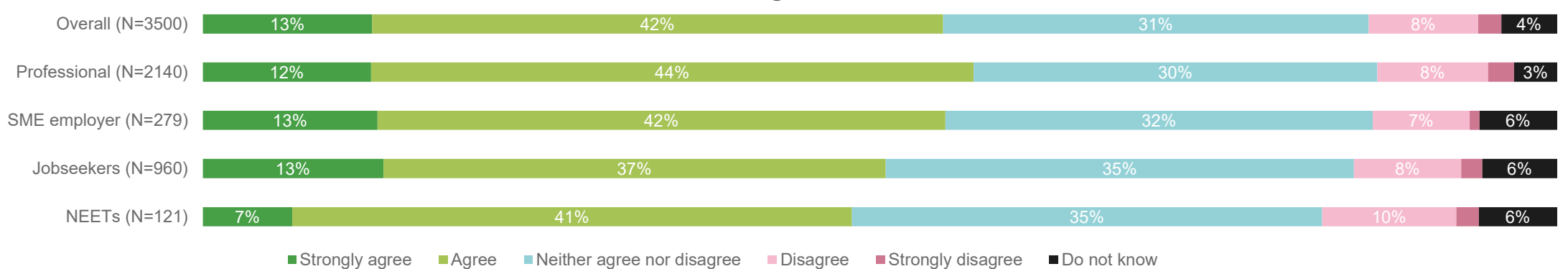
Section 4.3: Understanding

Understanding: animation (GIFS)

The message is clear



The message is authentic

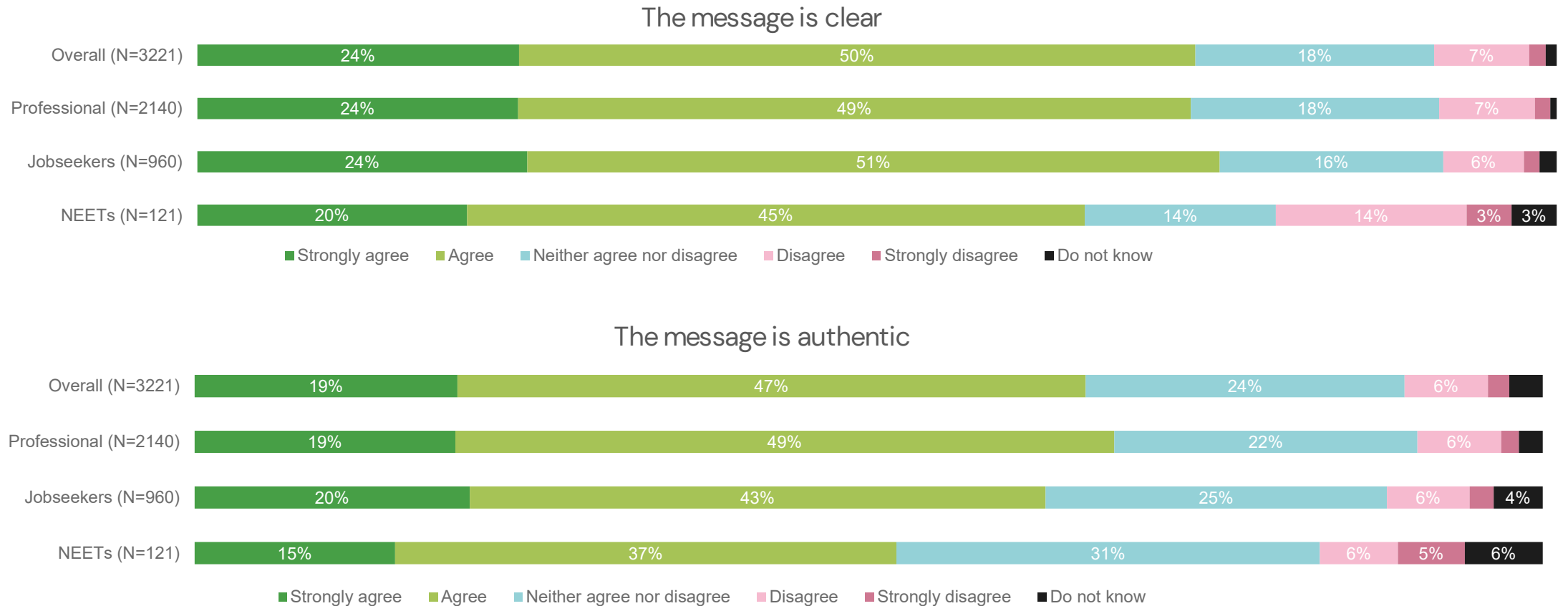


KPI: (understanding) % of people in the target audience reached by the campaign who agree with the following statements: the message is clear, the message is authentic



Section 4.3: Understanding

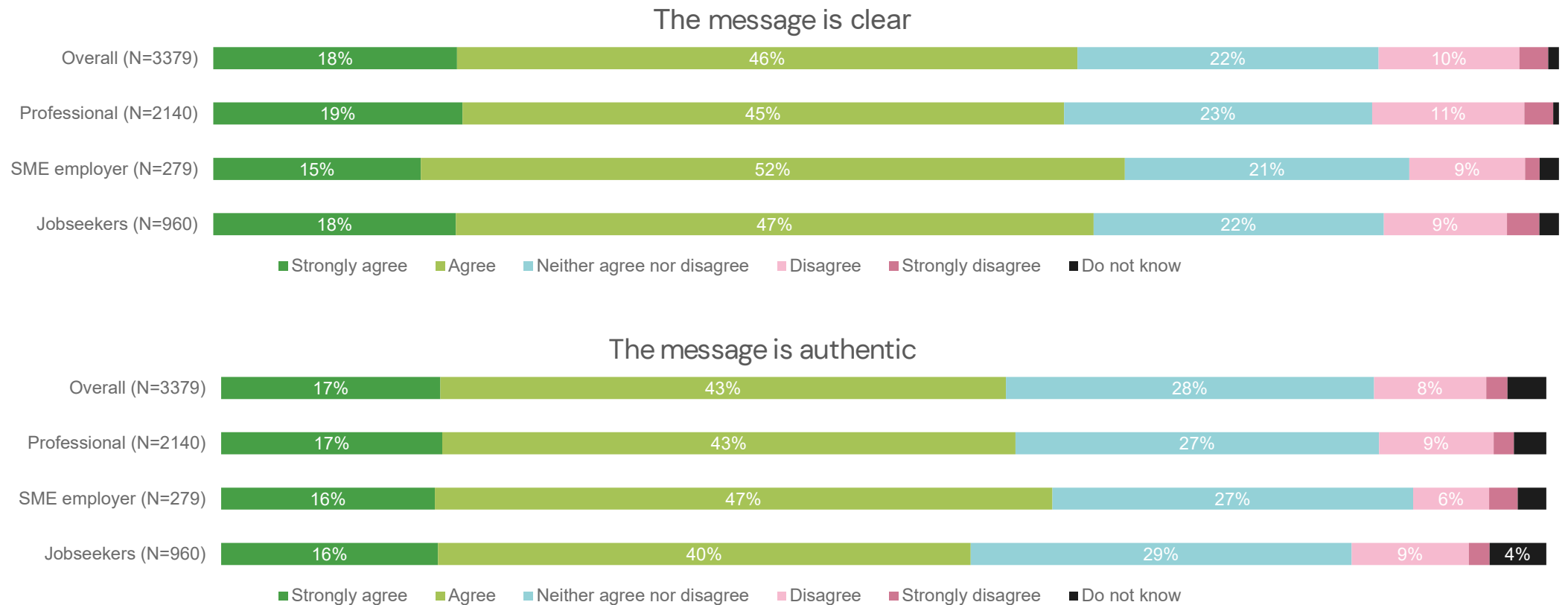
Understanding: video (First Jobber)





Section 4.3: Understanding

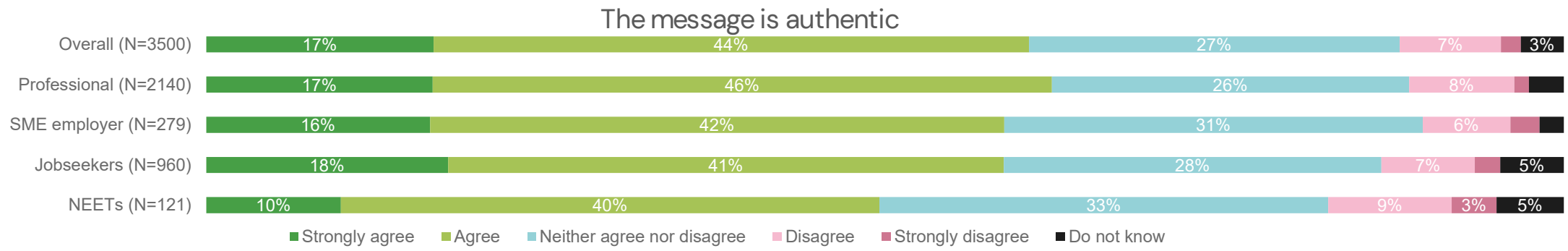
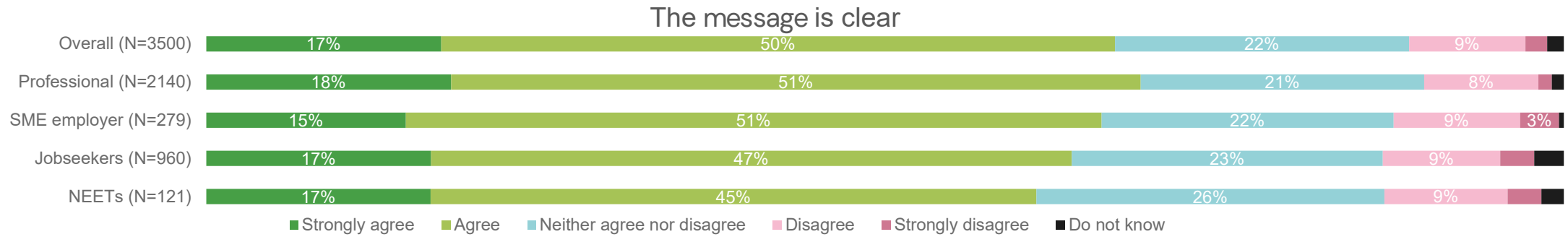
Understanding: video (Engineer)





Section 4.3: Understanding

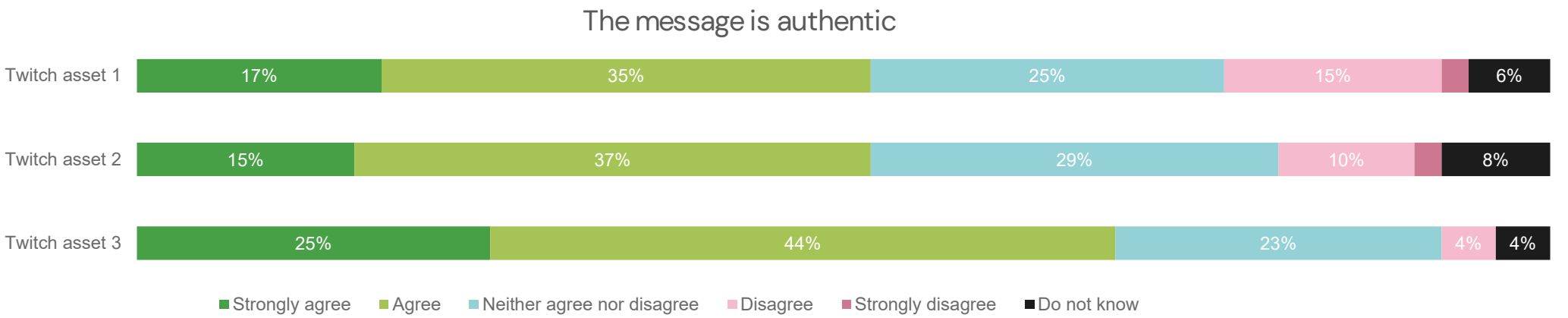
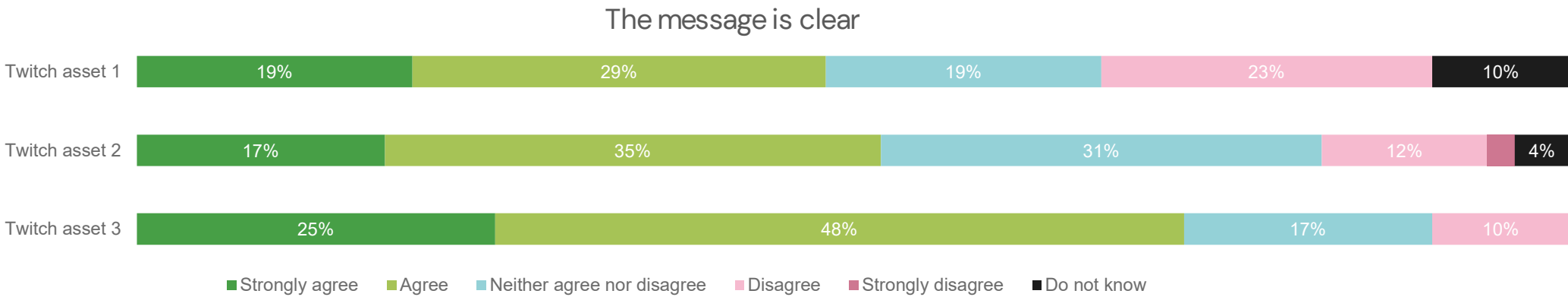
Understanding: video (Designer)



KPI: (understanding) % of people in the target audience reached by the campaign who agree with the following statements: the message is clear, the message is authentic

Section 4.3: Understanding

Understanding: Twitch Assets (N=52)



KPI: (understanding) % of people in the target audience reached by the campaign who agree with the following statements: the message is clear, the message is authentic



Section 4.4: Empowerment (Opinion)

- Each target audience was asked their opinion on different statements regarding 'skills' and the European Union.
- Again, we notice (this will be through throughout the research) that being **exposed** to the campaign significantly **increases** the level in which the respondents agree. This is particularly positive seeing that in the baseline research 'Skills' had been evaluated as less important for them than other of the tested themes (work, family, equality, income).

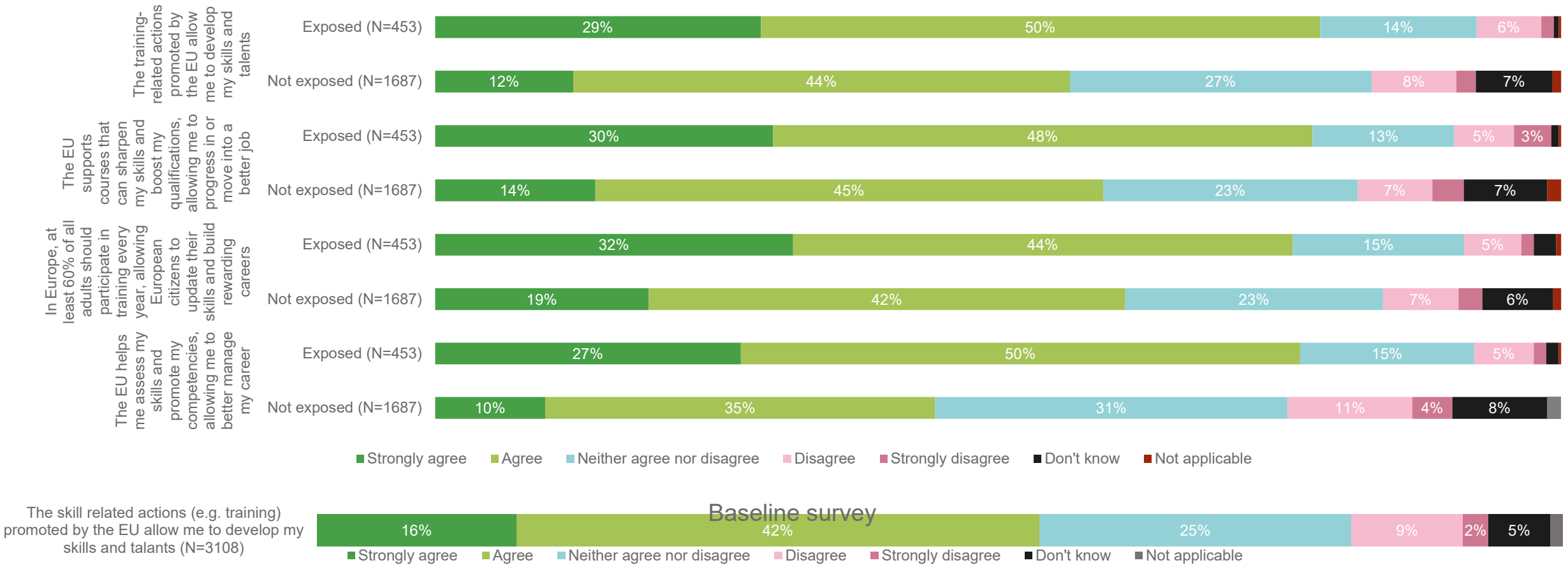
Section 4.4: Empowerment (Opinion): Professionals

- The professionals who were **exposed** to the campaign **more or less agreed equally** with all statements proposed (between 79% and 76%), while those who weren't exposed didn't agree as strongly or were more indifferent.
- The respondents that weren't exposed **agreed the least** with '*The EU helps me assess my skills and promote my competencies, allowing me to better manage my career*' (15% (strongly) disagreed), whereas '*The training-related actions promoted by the EU allow to develop my skills and talent.*' and '*In Europe, at least 60% of all adults should participate in training every year, allowing European citizens to update their skills and build rewarding careers*' 10% (strongly) **disagreed**.



Section 4.4: Empowerment (Opinion): Professionals

Opinions on EU's actions on skills: Professionals



KPI: (Opinion)

- In Europe, at least 60% of all adults should participate in training every year, allowing European citizens to update their skills and build rewarding careers
- The EU supports courses that can sharpen my skills and boost my qualifications, allowing me to progress in or move into a better job



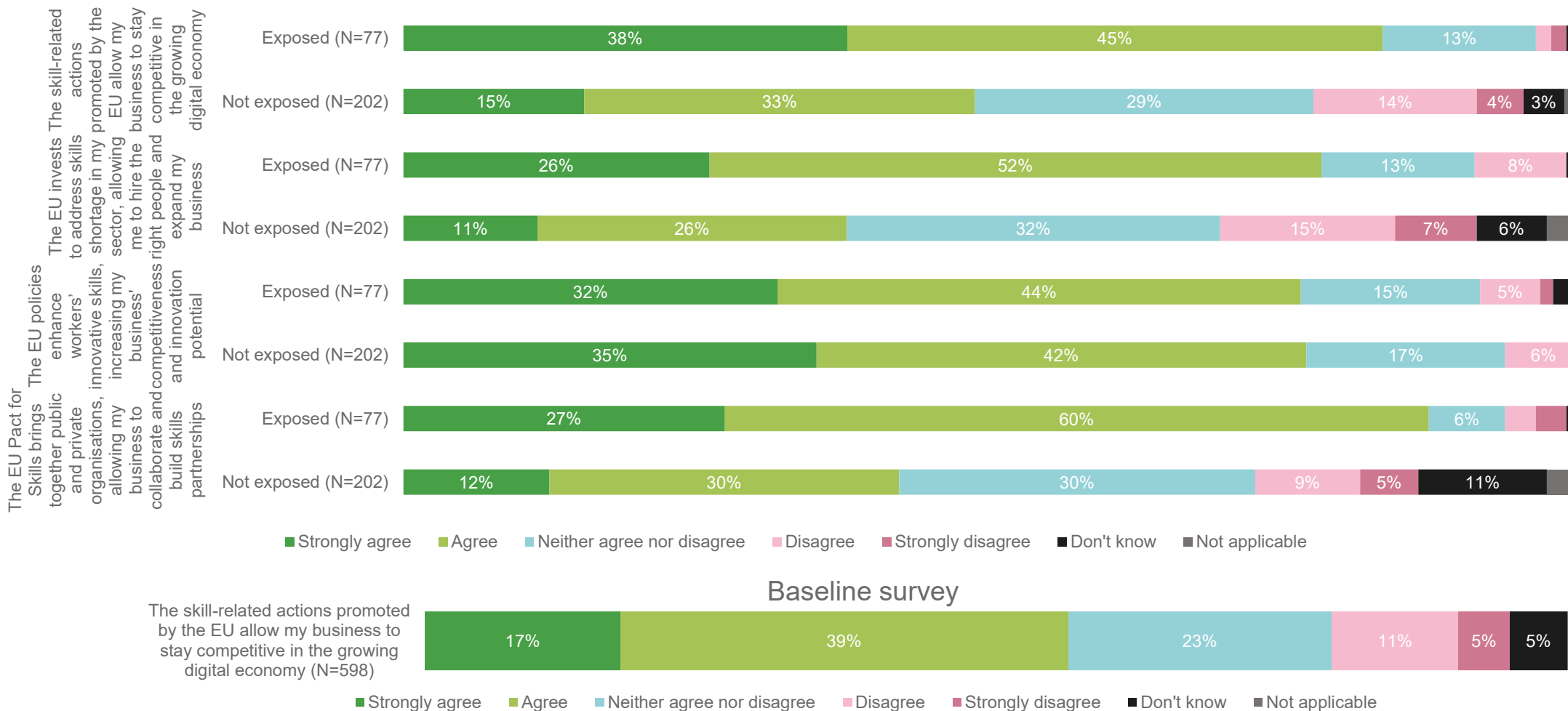
Section 4.4: Empowerment (Opinion): SME employers

- The SMEs follow **the same trend as the Job seekers**, except for 'The policies enhance workers' innovative skills increasing my business' competitiveness and innovation potential' where, surprisingly, the not-exposed respondents agreed slightly more than the exposed group (77% & 76%).
- It seems that SMEs in general, exposed or not, understand that the **EU policies do increase innovation and competition potential**.
- Digital innovation, decreasing job shortage and the stimulating cooperation between public and private organization, on the other hand, **only seems realistic after seeing the campaign**.



Section 4.4: Empowerment (Opinion): SME employers

Opinions on EU's actions on skills: SME employers



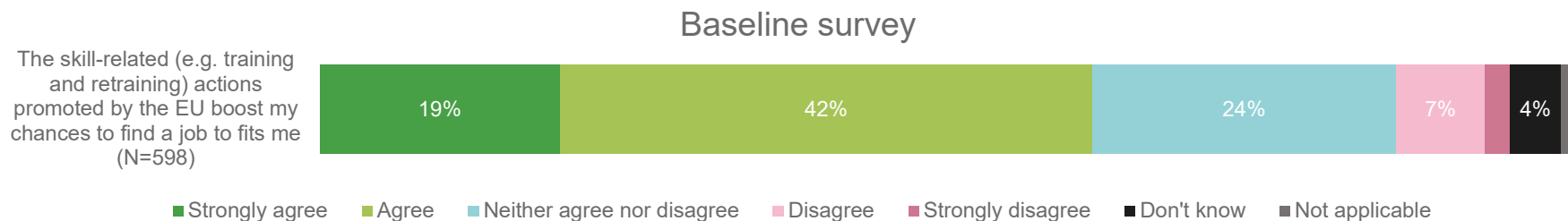
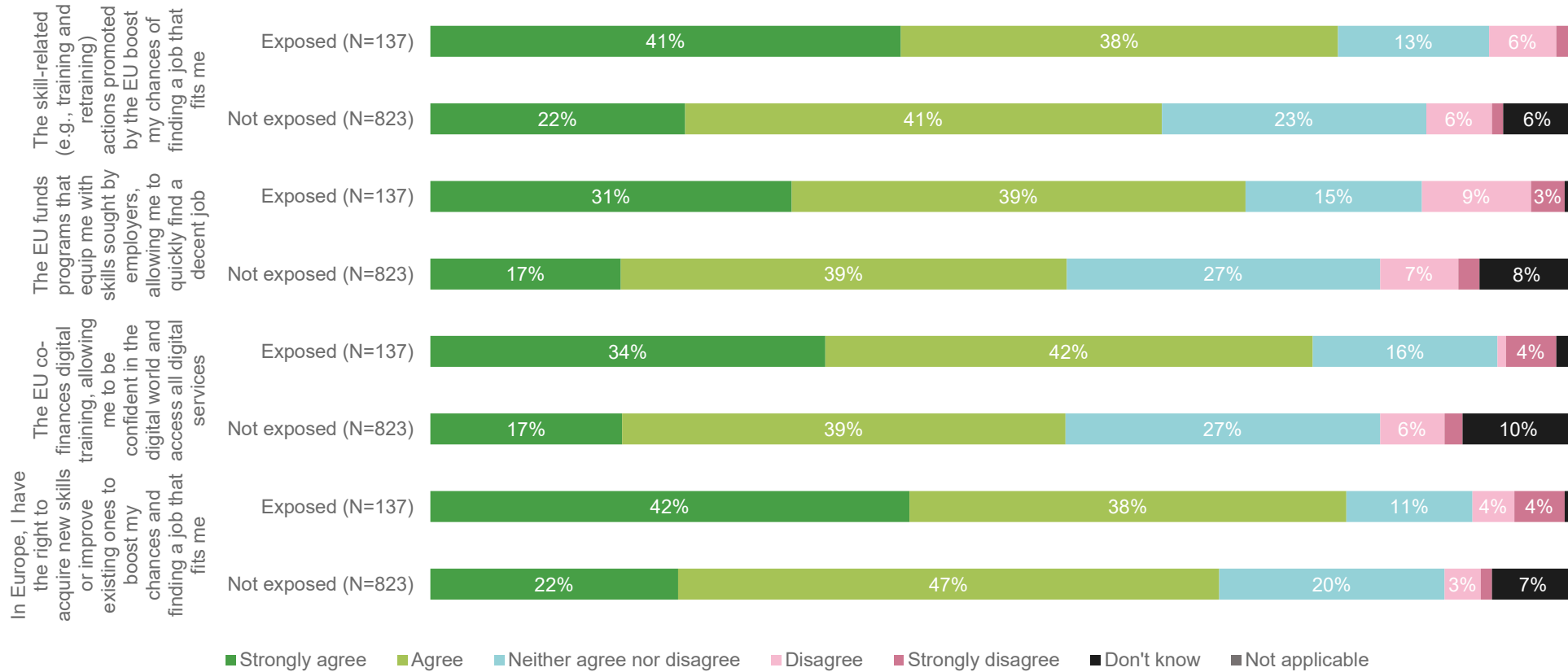
Section 4.4: Empowerment (Opinion): Job seekers

- Job seekers **tend to agree more with the statements overall than other target groups**, specifically when it comes to the not-exposed. A majority agreed with every statement (lowest agreement rate was 56%) showing an overall trust in the EU when it comes to their skills and employment policy.
- Once we get into more concrete actions like ensuring access to jobs and trainings, the **positive reaction is stronger**.



Section 4.4: Empowerment (Opinion): Job seekers

Opinions on EU's actions on skills: Jobseekers



KPI: (opinion):
 - The EU co-finances digital training, allowing me to be confident in the digital world and access all digital services
 - The EU funds programs that equip me with skills sought by employers, allowing me to quickly find a decent job



Section 4.4: Empowerment (Opinion): NEETs

- Compared to the baseline surveys, the respondents **are more in agreement that the EU is taking skill-related actions to boost chances to find a job.**

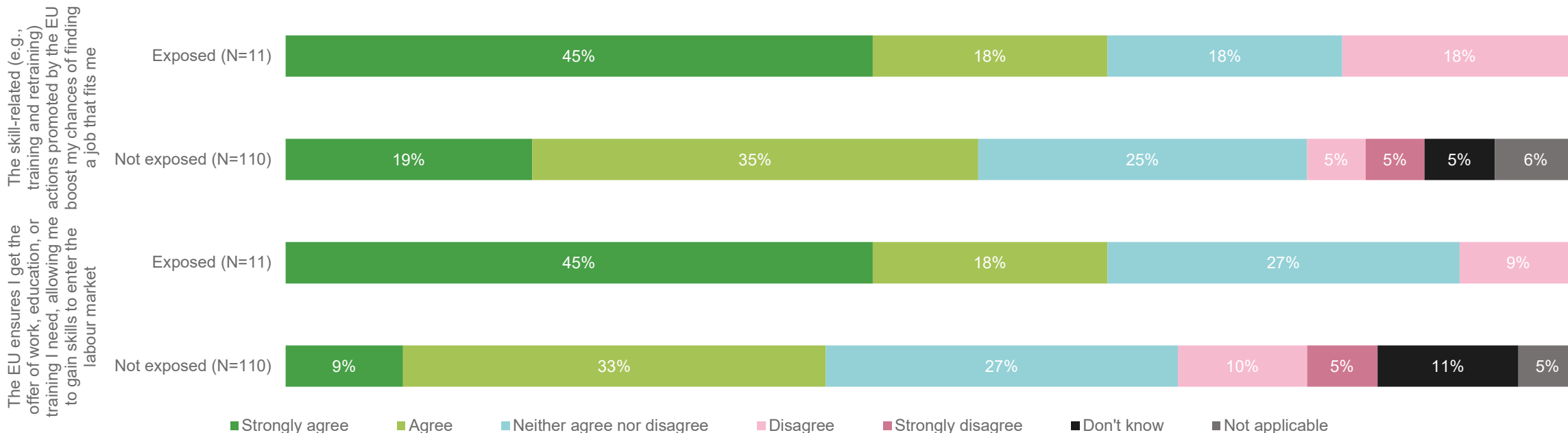
Being exposed to the campaign heightens the perception but a large part of the increase happened organically.

(BL: 43% (strongly) agree; N-Ex: 54%; Ex: 63%)



Section 4.4: Empowerment (Opinion): NEETs

Opinions on EU's actions on skills: NEETs



Baseline survey





Section 4.4: Empowerment (Opinion)

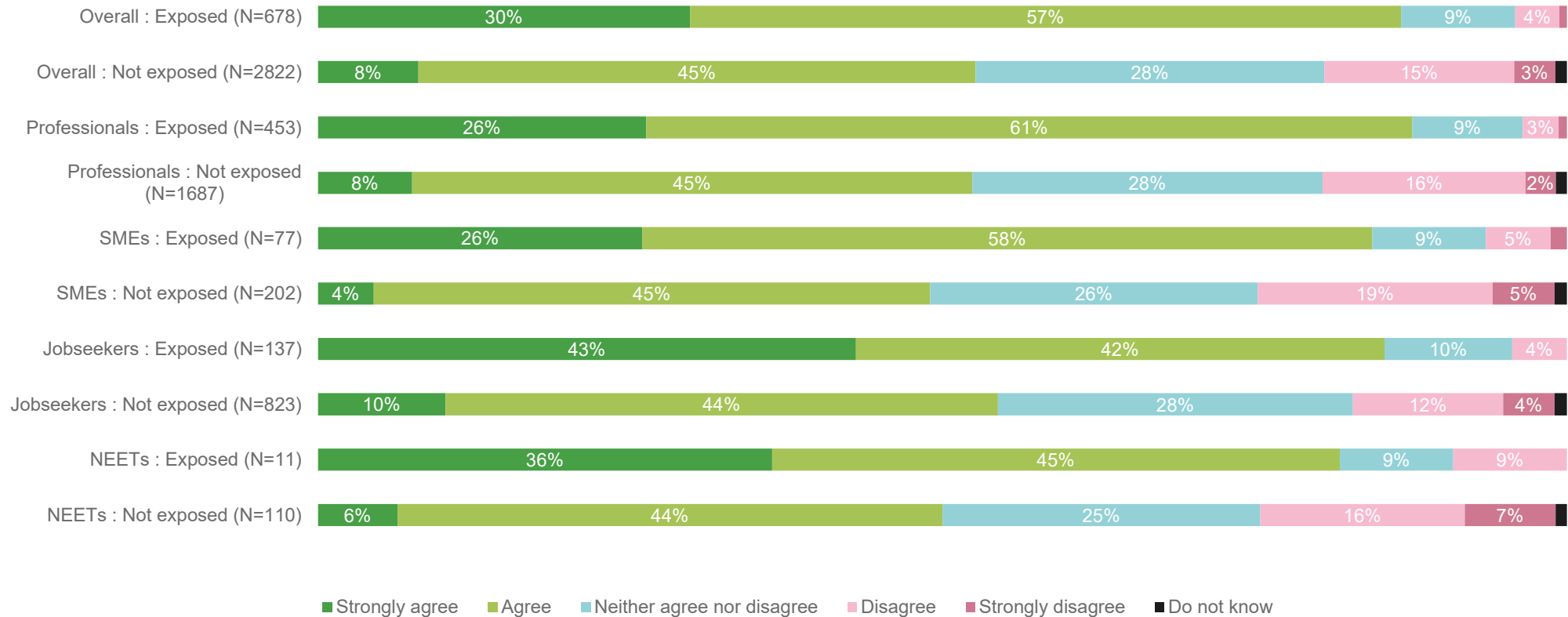
Empowerment (Opinion)

- The campaign does **increase** the understanding of the EU initiative on skill (87% (strongly) agrees vs 53%). This is true **for all target audiences**.
- Seeing the campaign gives a **better understanding of the impact the EYS** has on their daily life (72% (strongly) agrees vs 35%). and the benefits it brings them (79% (strongly) agrees vs 52%).



Section 4.4: Empowerment (Opinion)

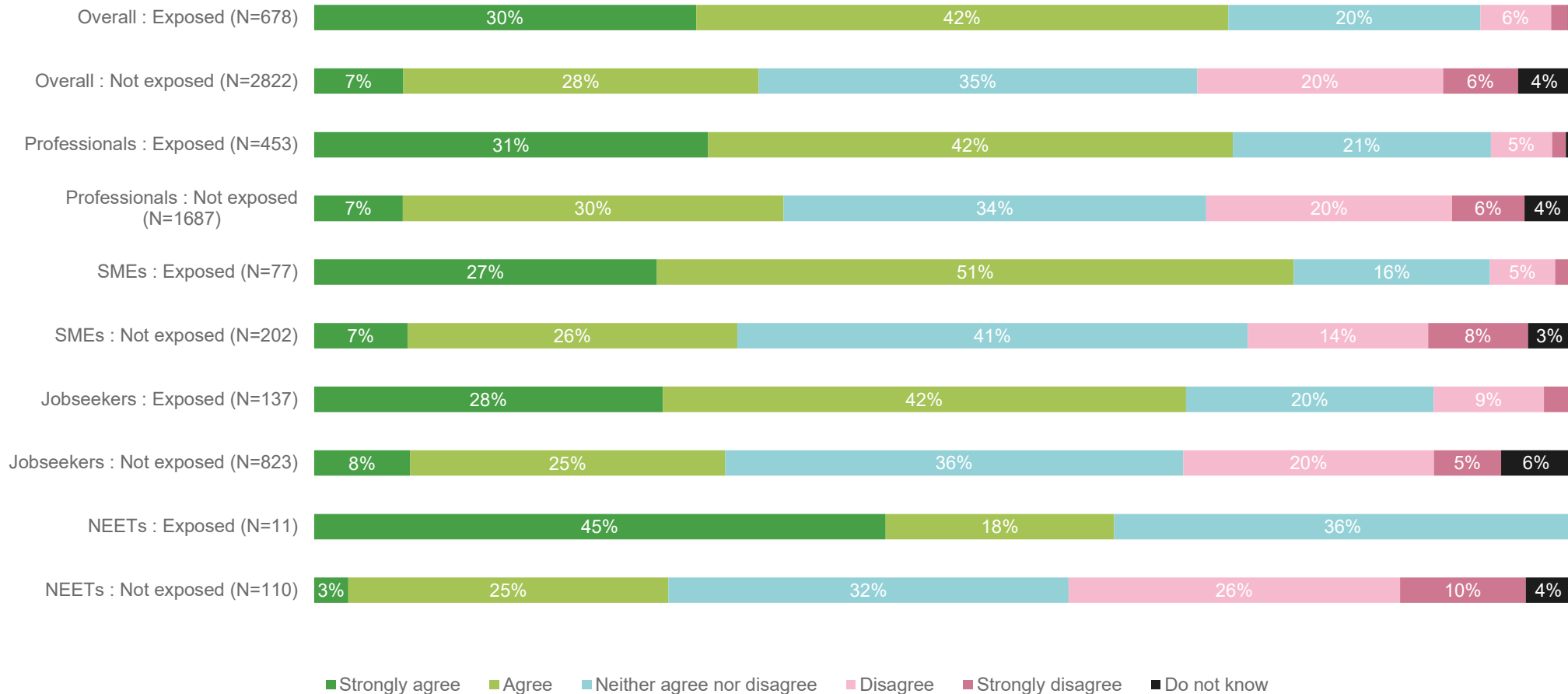
Opinion on better understanding of the EU initiative on skills as a result of the campaign (Q32.1)





Section 4.4: Empowerment (Opinion)

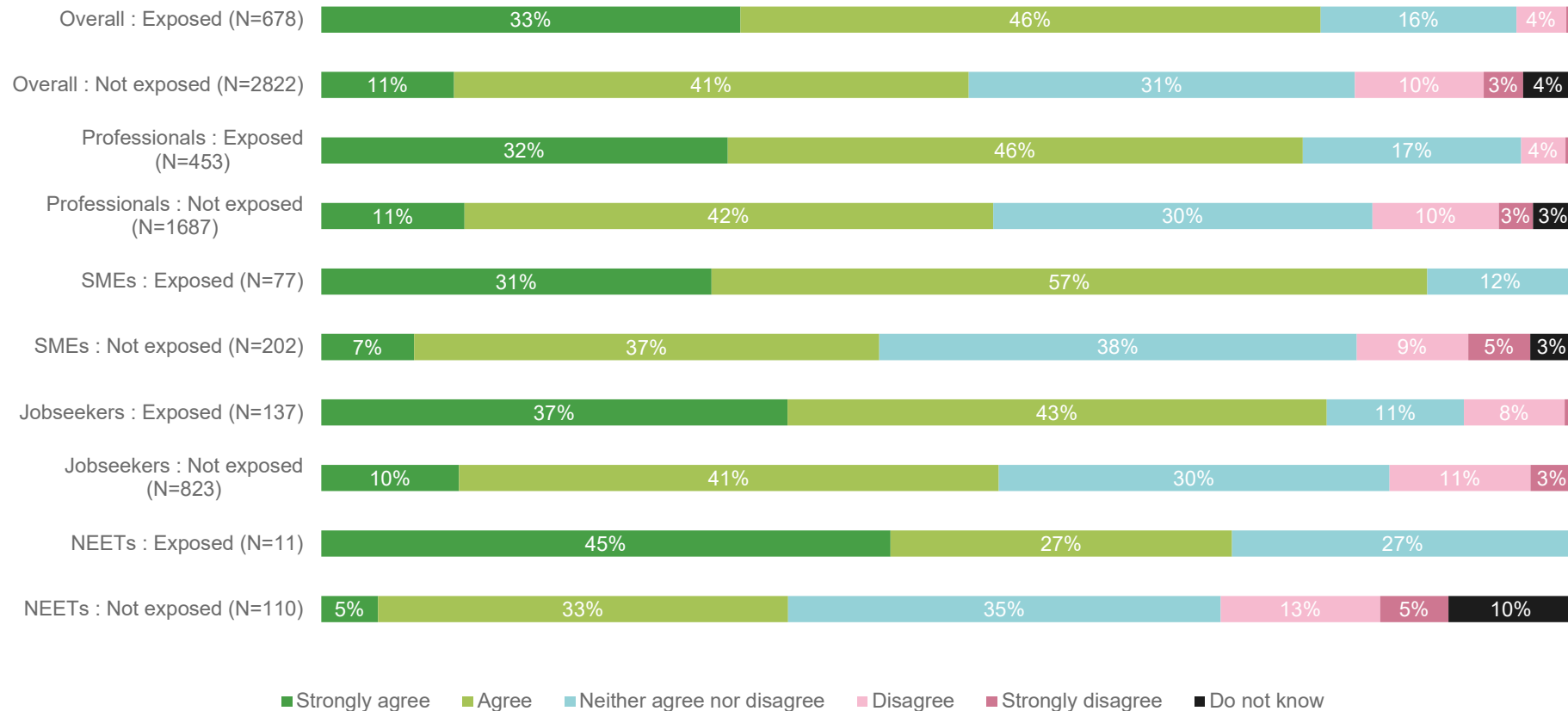
Opinion on the European Year of Skills having an impact on daily life





Section 4.4: Empowerment (Opinion)

Opinion on whether the European Year of Skills works in the interests of respondents



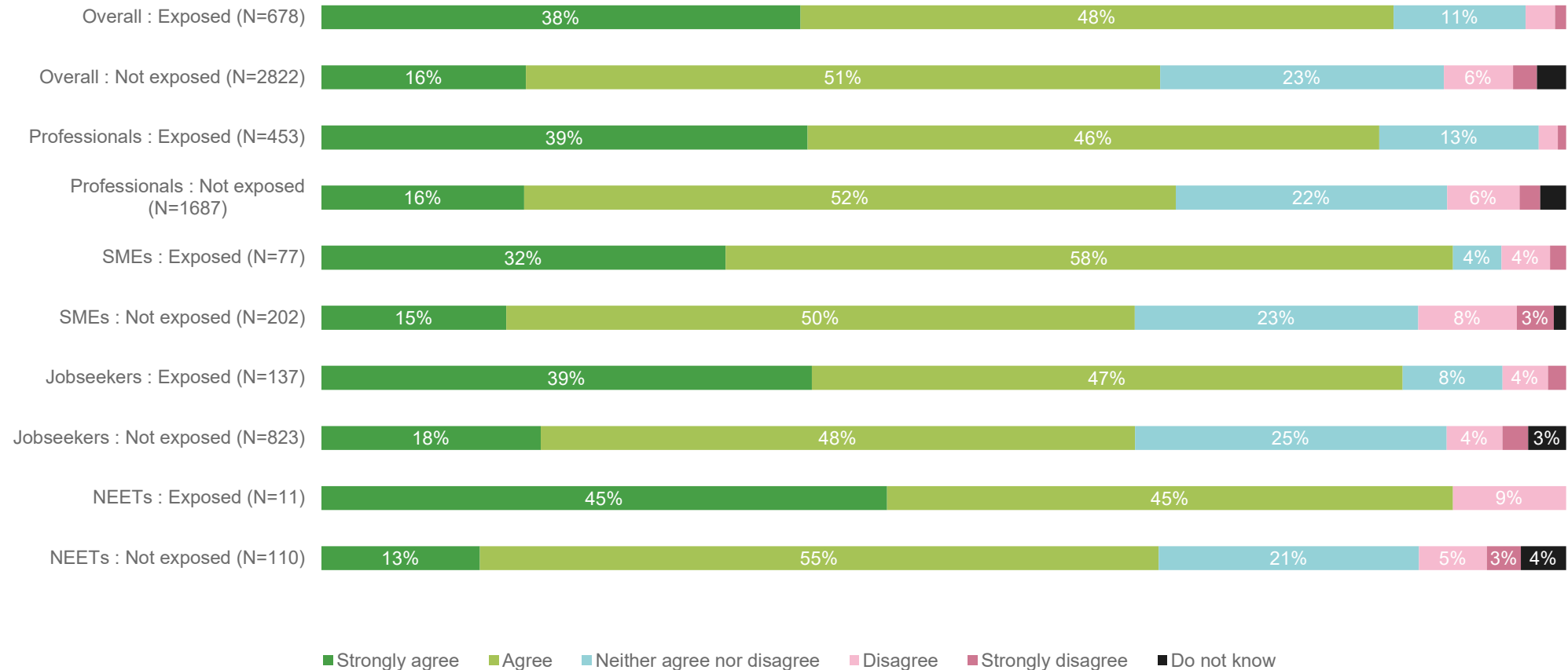
Section 4.5: Empowerment (Perception)

- Based on the results, we can conclude that even though a large majority have **positive attitude towards the EU** supporting their country in improving jobs, skills, and training opportunities (N-Ex: results for the target groups range between 65 and 68%), but people who have seen the campaign agree in higher numbers and more strongly (Ex: between 85 to 90%).



Section 4.5: Empowerment (Perception)

Opinion on whether respondents have a positive attitude towards the EU supporting their country in improving jobs, skills, and training opportunities



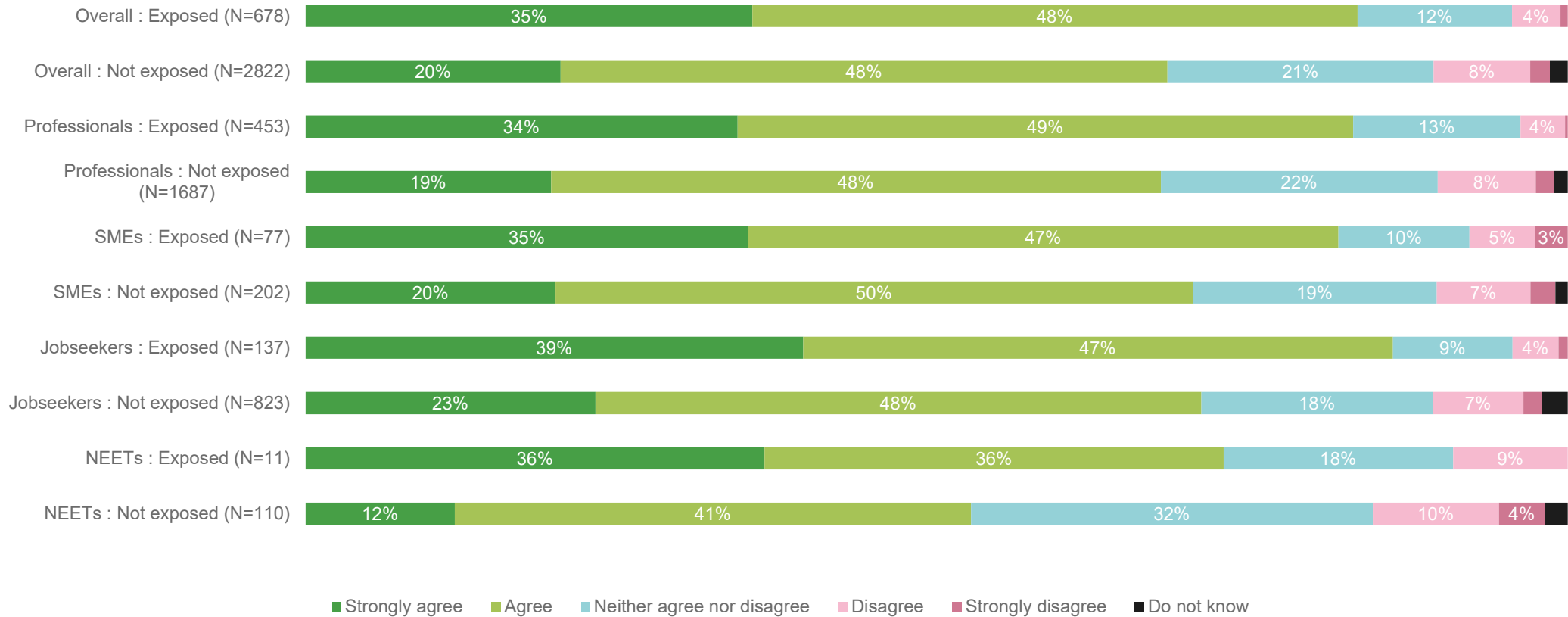
Section 4.6: Empowerment (Change (Participation))

- There is an overall interest among the respondents to find out more about the relevant opportunities to improve their skills (again slightly higher among people exposed by the campaign).
- Specifically, there is a curiosity among the exposed respondents towards the Europass (44%), Youth guarantee (43%), Erasmus + (35%) and the EFS+ (34%), while not-exposed respondents where more interest in finding out about the European Job days (35%)



Section 4.6: Empowerment (Change (Participation))

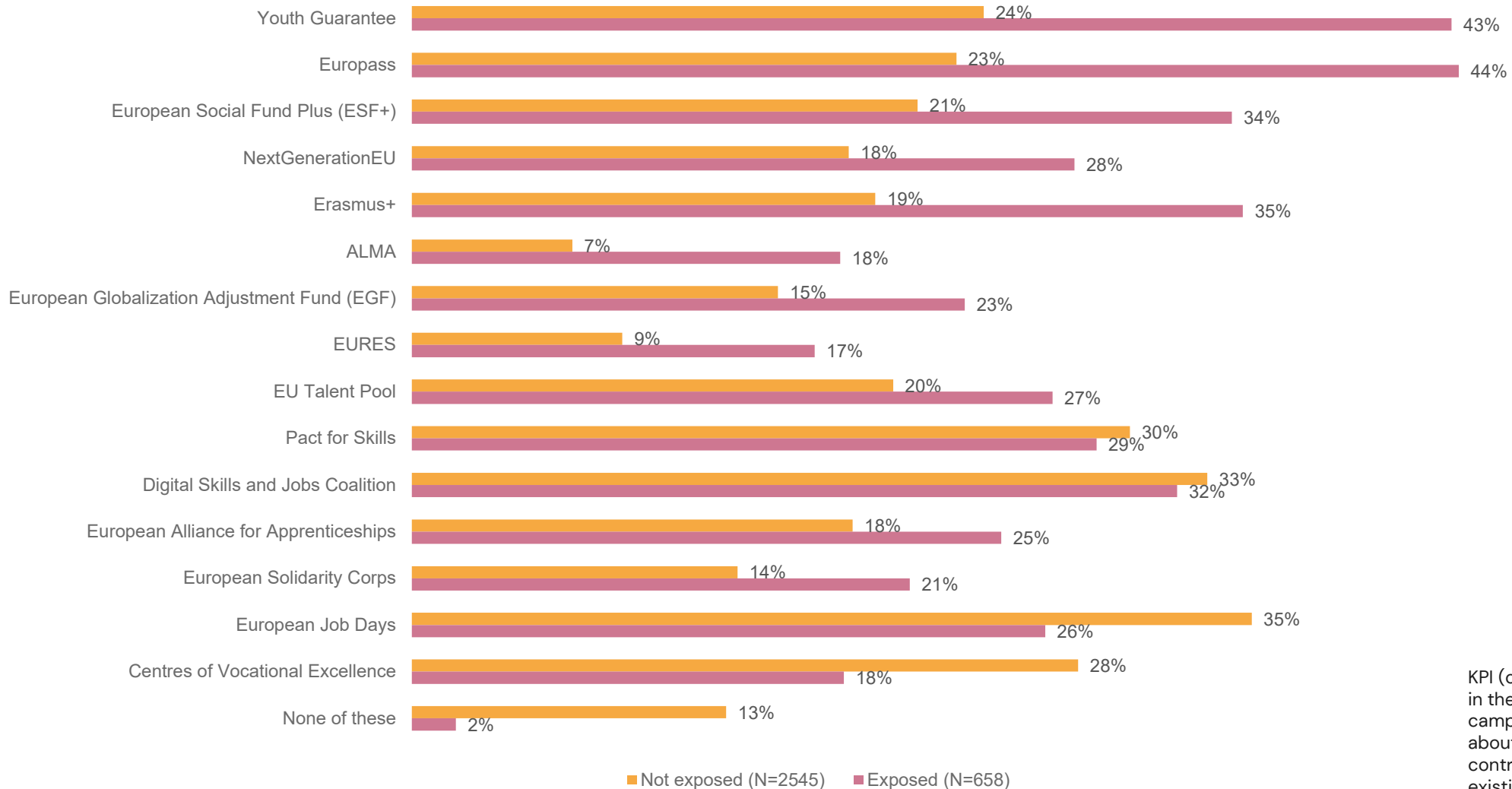
Agreement with the statement: "I want to find out more about the relevant opportunities to improve my skills"





Section 4.6: Empowerment (Change (Participation))

Willingness to find out more about specific EU initiatives



KPI (change (participation)): % of people in the target audience reached by the campaign willing to find out more about specific EU initiatives that contribute to training and improving existing skills.



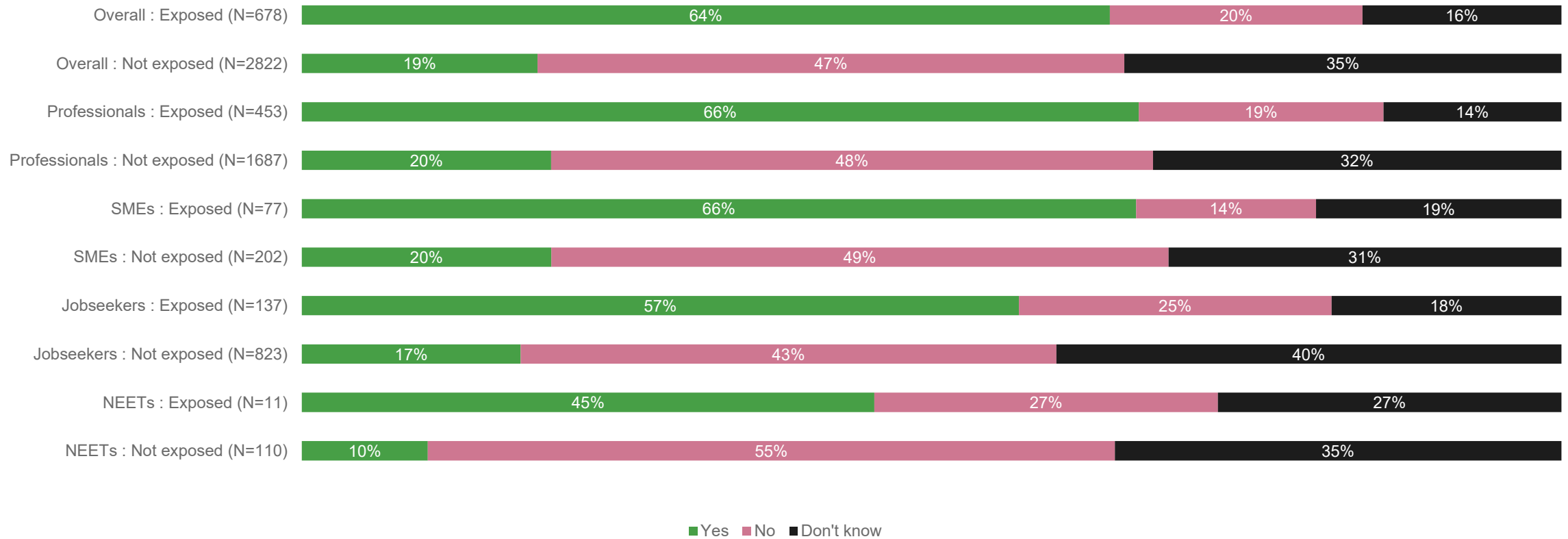
Section 4.6: Empowerment (Change (Participation))

- When asked whether the respondents are willing to participate to initiatives for training and/or skill improvement within the next six months, we fall back into the same patterns as we've seen throughout the research: of the not-exposed, NEETs are **barely interested** (10% is interested) while on top we find professionals and SME's at **double the percentage**.
- For the respondents exposed to the campaign we see the same ranking, but they show a **lot more enthusiasm** (NEETs: 45%; Professionals & SMEs: 66%).
- If intent translates into action for those exposed, the number will align with the EU **objectives of at least 60% of all adults participating in a training every year** (64%).



Section 4.6: Empowerment (Change (Participation))

Past participation or willingness to participate in EU initiatives for training and/or skill improvement within the next six months



KPI (Change (participation)): % of people in the target audience reached by the campaign who intend to take part in EU initiatives for training and/or improving their skills in the next 6 months after having seen the campaign.



Section 4.7: Empowerment (Trust)

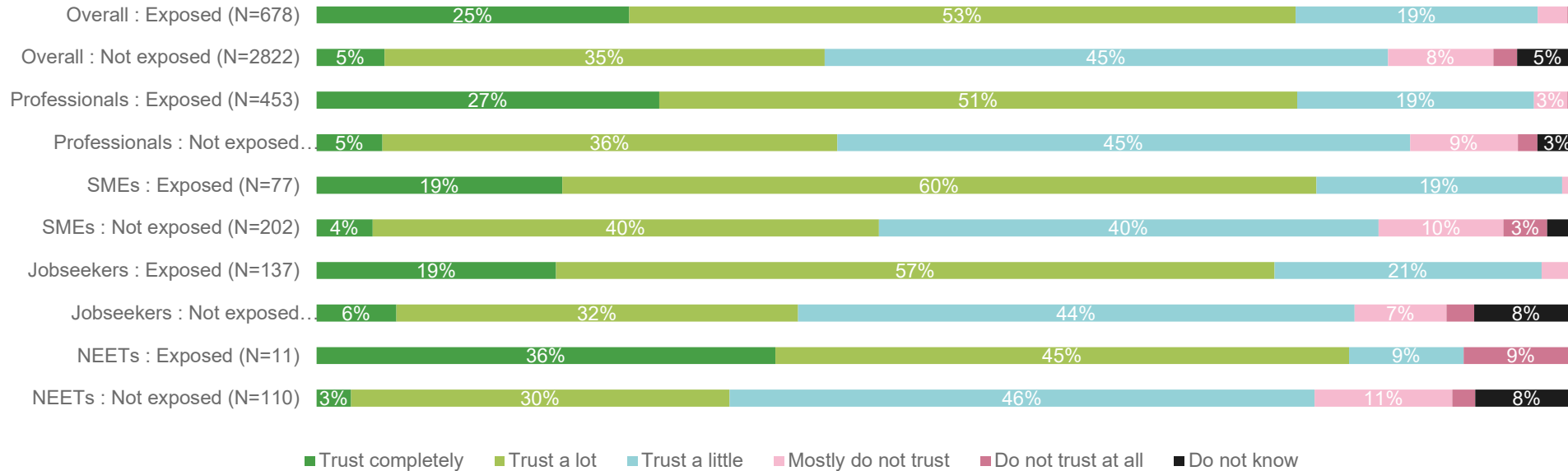
- The campaign also **succeeded in increasing the overall trust in the EU as an actor of social change** among the target audience, more specifically on supporting them, improving their lives, contributing to training and skill improvement. Especially among the NEETS we notice a substantial increase in trust (33% vs 81%).
- Surprisingly, **exposed** were slightly **less convinced** about the EU taking action on the social employment situation than the not exposed. Still, there is **increase in trust** unrelated to the campaign when we compare the results with the baseline survey.



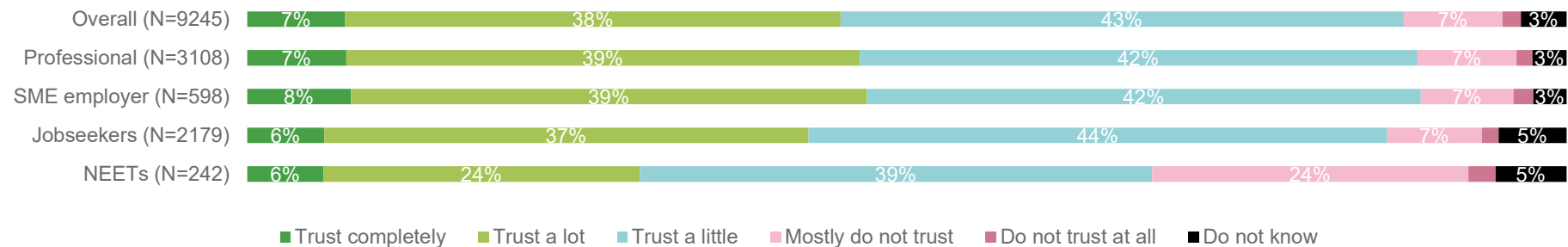


Section 4.7: Empowerment (Trust)

Trust in the EU as an actor of social change



Baseline survey

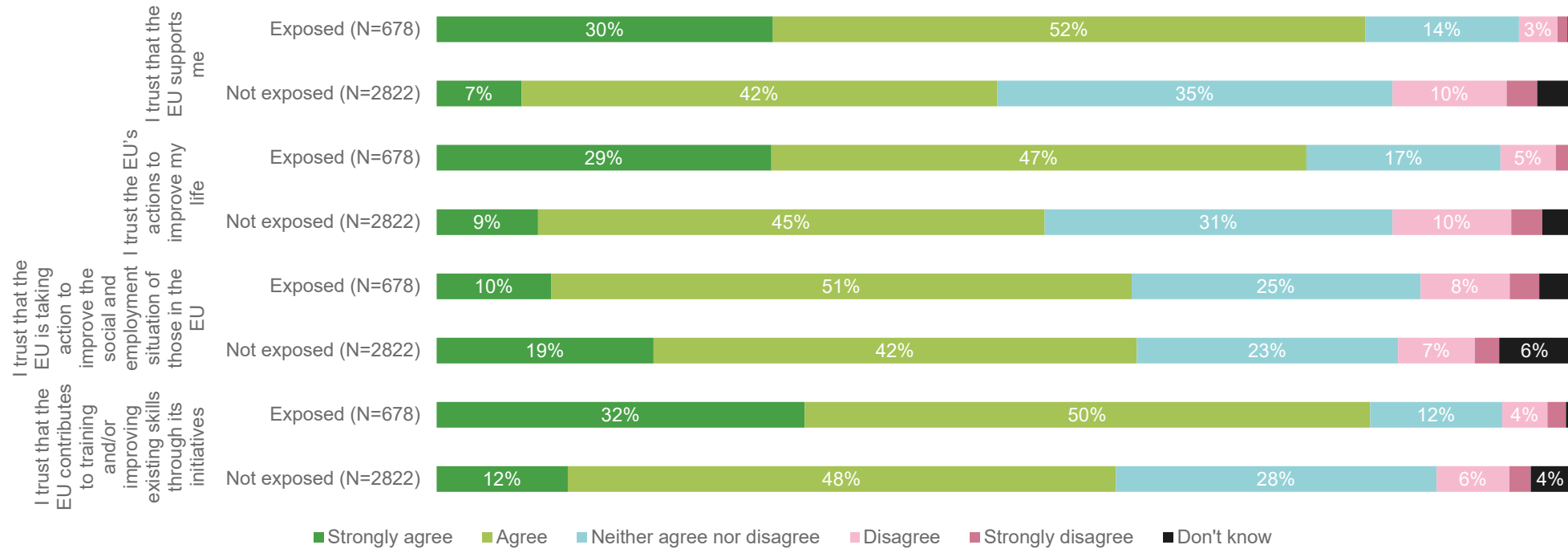


KPI: (trust) % of people in the target audience reached by the campaign who tend to trust the EU contributes to training and/or improving existing skills through its initiatives

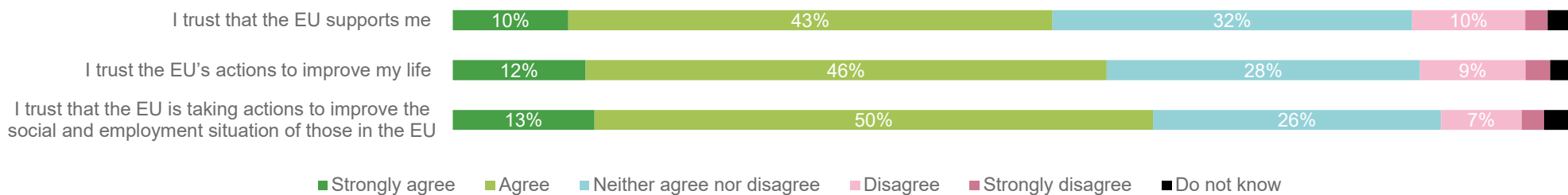


Section 4.7: Empowerment (Trust)

Trust in the EU in the context of skills



Baseline survey



KPI: (trust) % of people in the target audience reached by the campaign who tend to trust the EU contributes to training and/or improving existing skills through tis initiatives 61

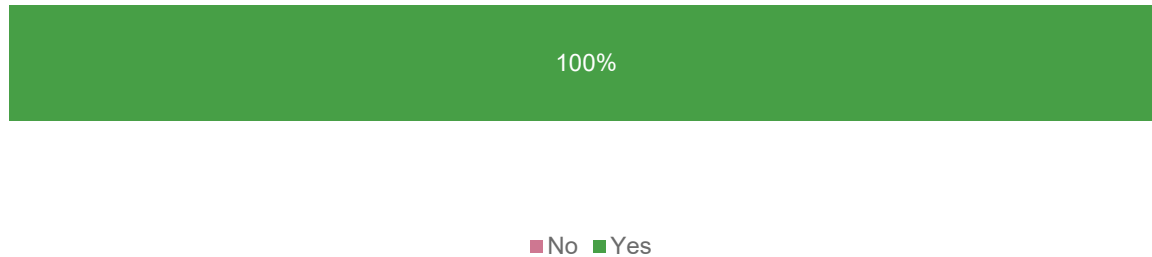


Annexes



Clarifying questions: SME employers and student jobseekers

Does your business have less than 250 employees?



- This question only asked to business owners.
- 100% answered yes qualified as SME employers.

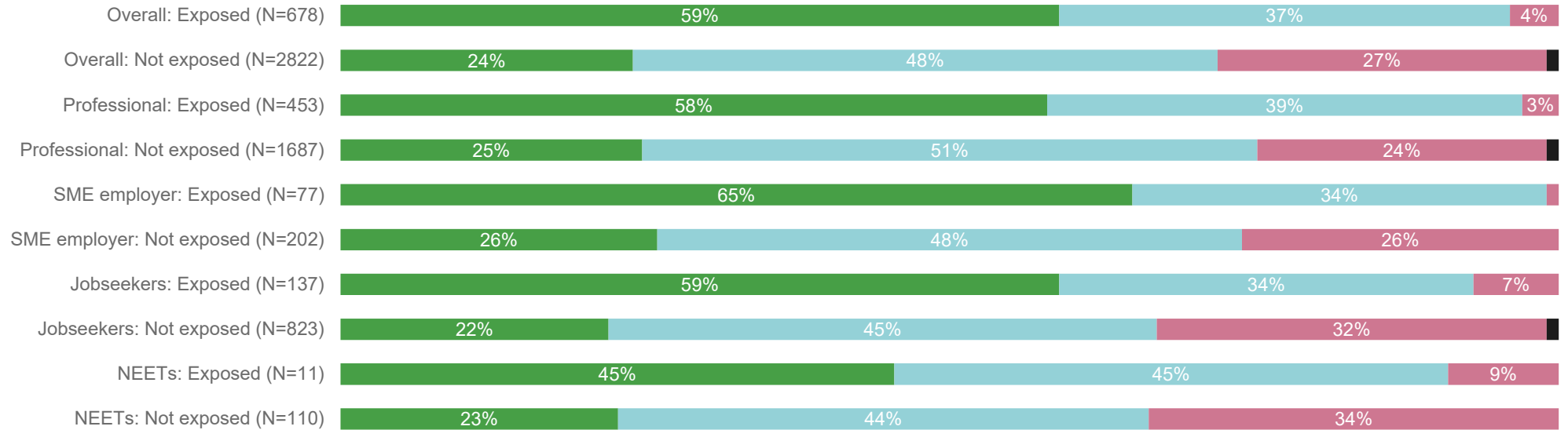
You said you are a student. Which of the following applies to you?



- This question only asked to students.
- Those students with a job may qualify as working parents of young children depending on answers to other questions
- Jobseekers
- Those students without a job and not looking for one were disqualified

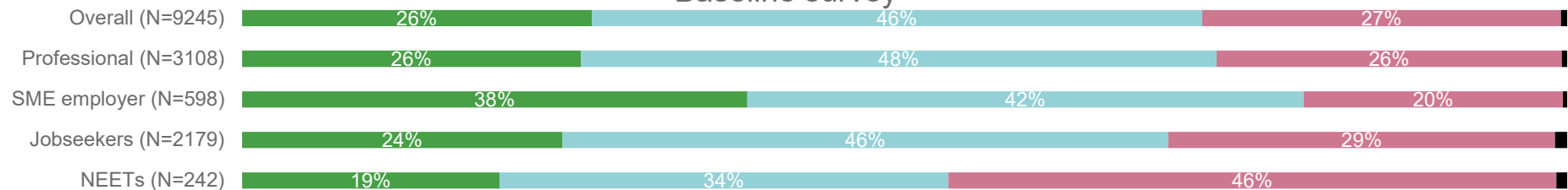


Are you aware that the EU is promoting actions to improve your social situation?



■ Yes, I am aware that the EU does this ■ I think I have heard about these EU actions before ■ No, I didn't know that the EU did this ■ Do not wish to respond

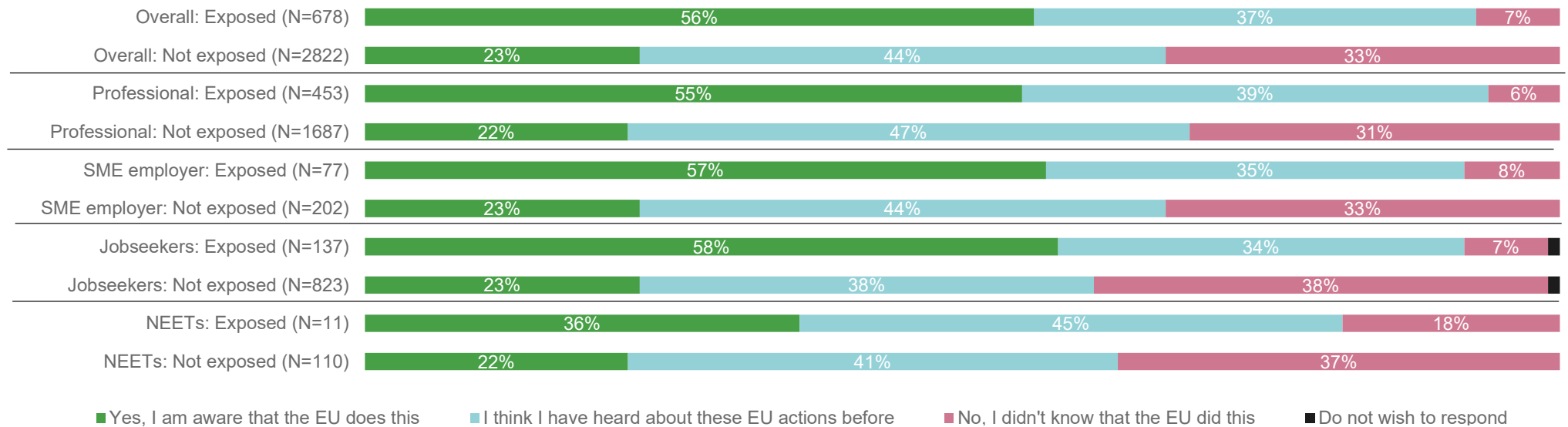
Baseline survey



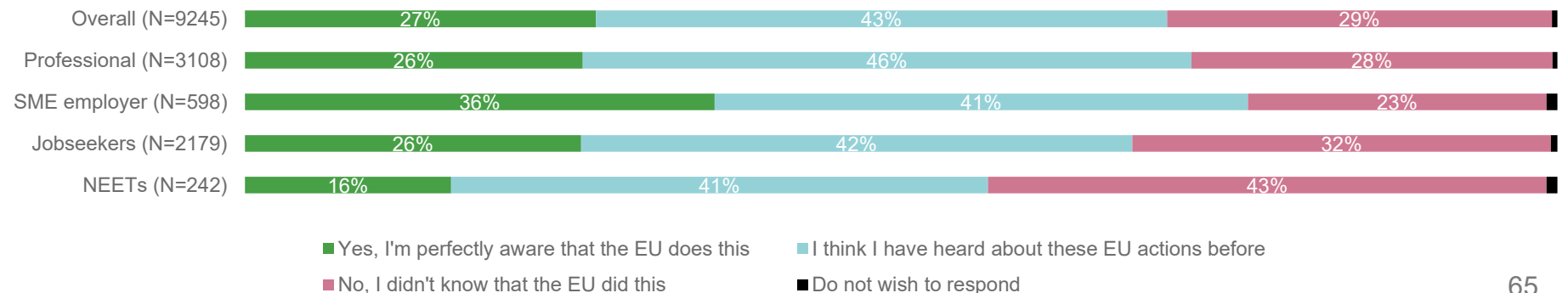
■ Yes, I'm perfectly aware that the EU does this ■ I think I have heard about these EU actions before
■ No, I didn't know that the EU did this ■ Do not wish to respond



Are you aware that the EU is promoting actions to improve your employment situation?

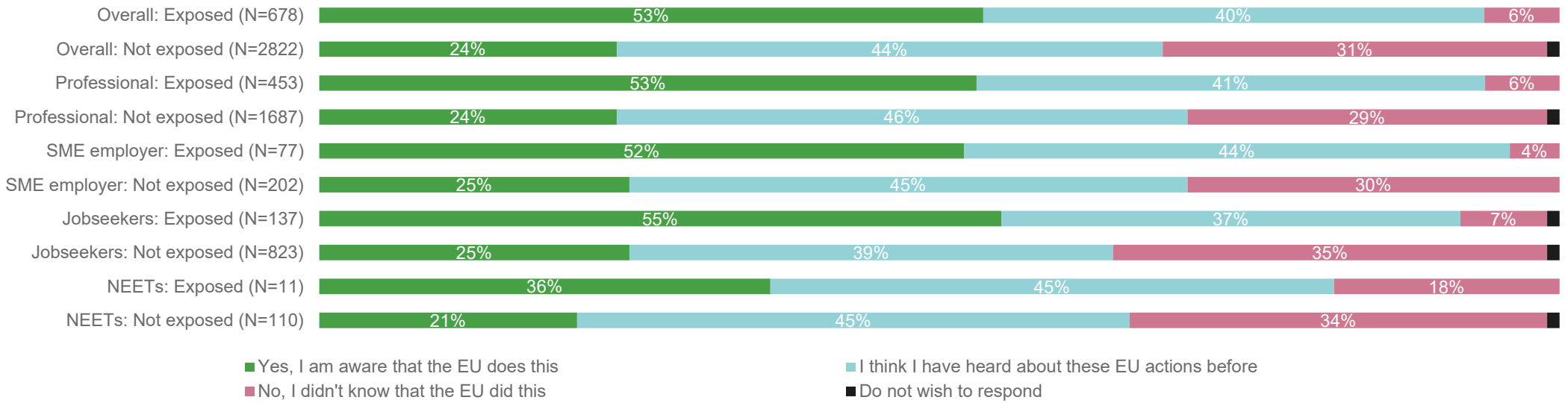


Baseline survey

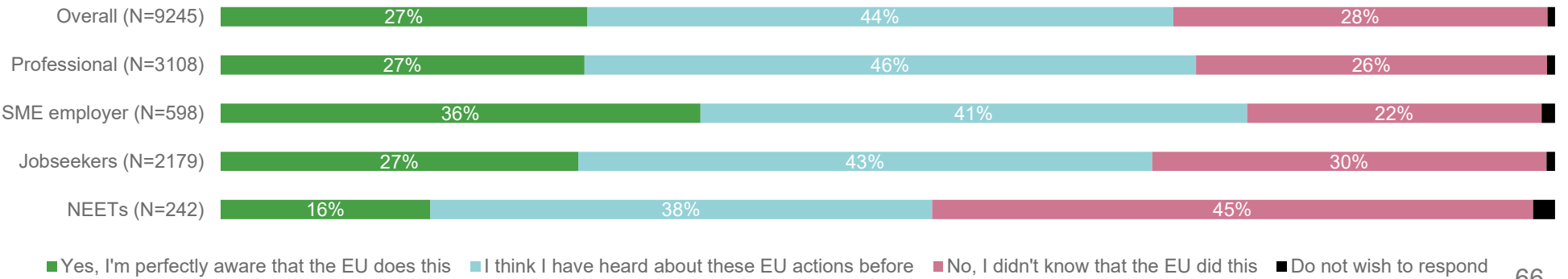




Are you aware of the following?: The EU is promoting actions to improve your working conditions

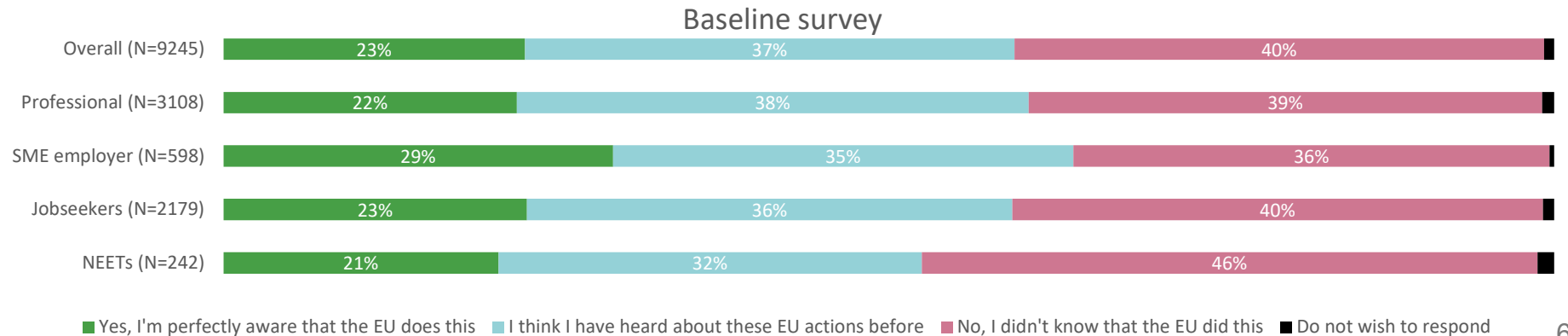
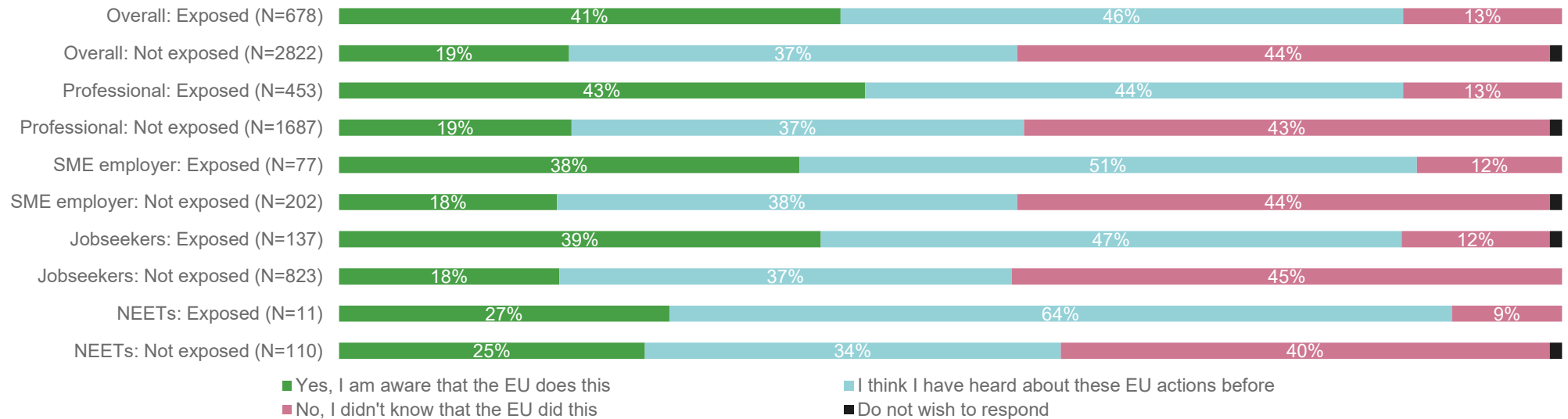


Baseline survey



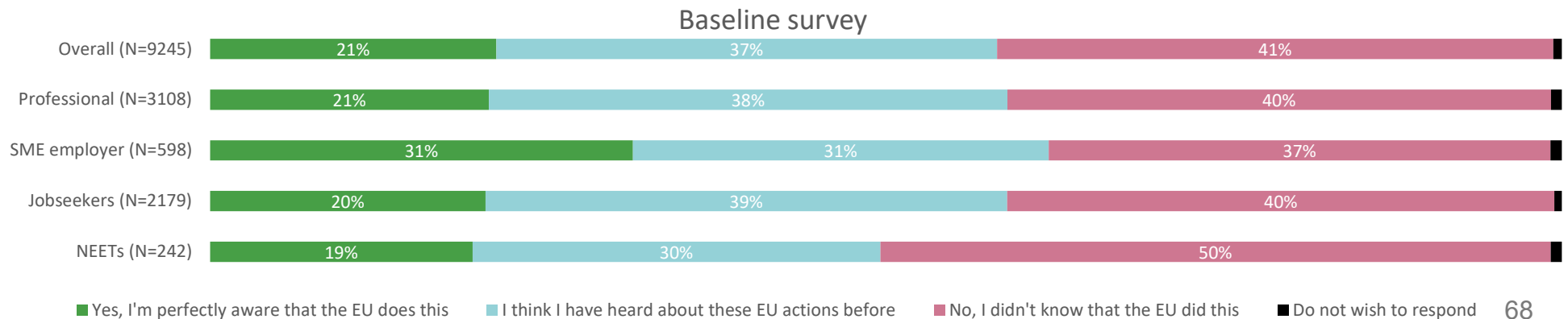
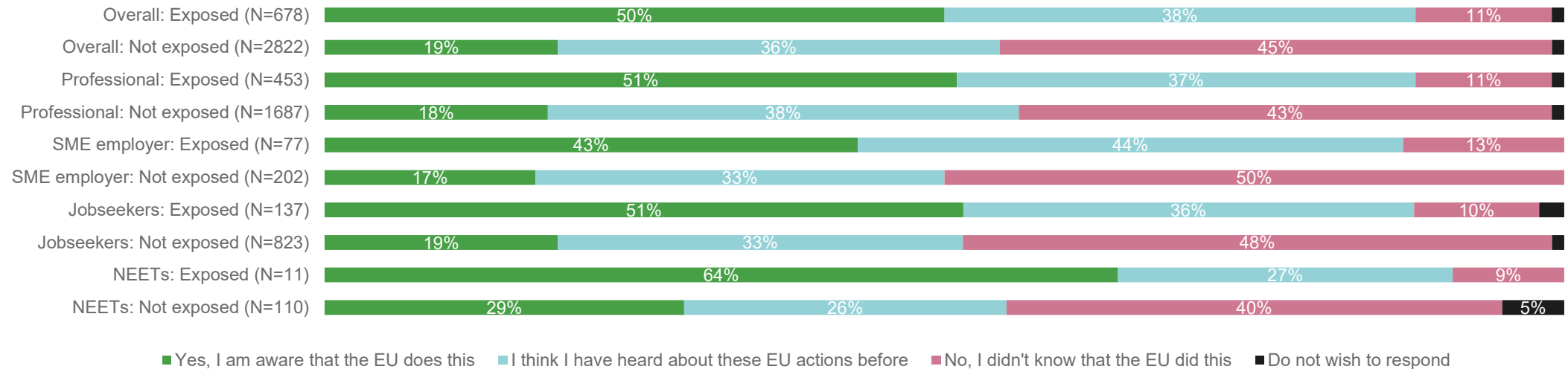


Are you aware of the following?: The EU is promoting actions to support your income



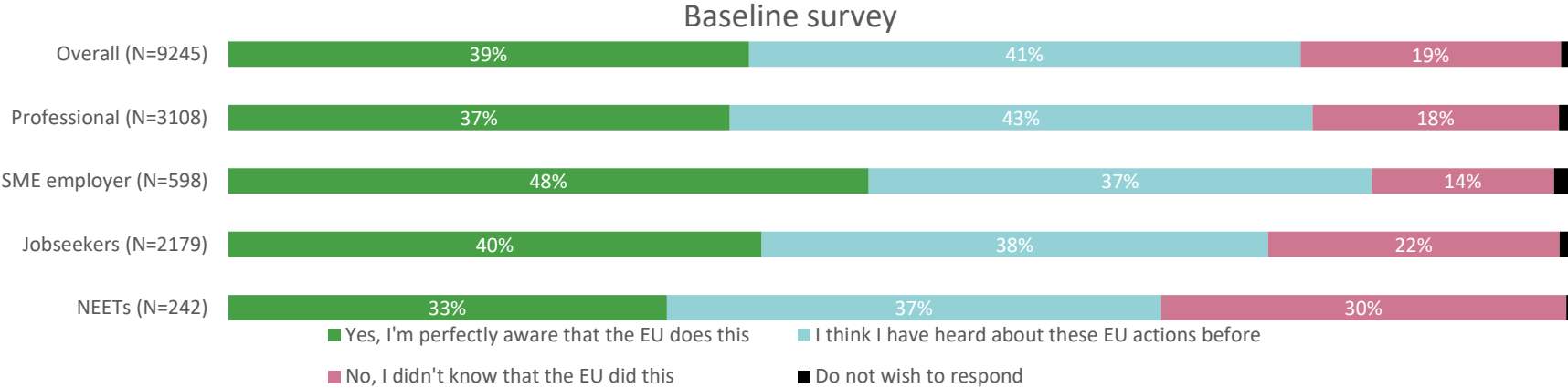
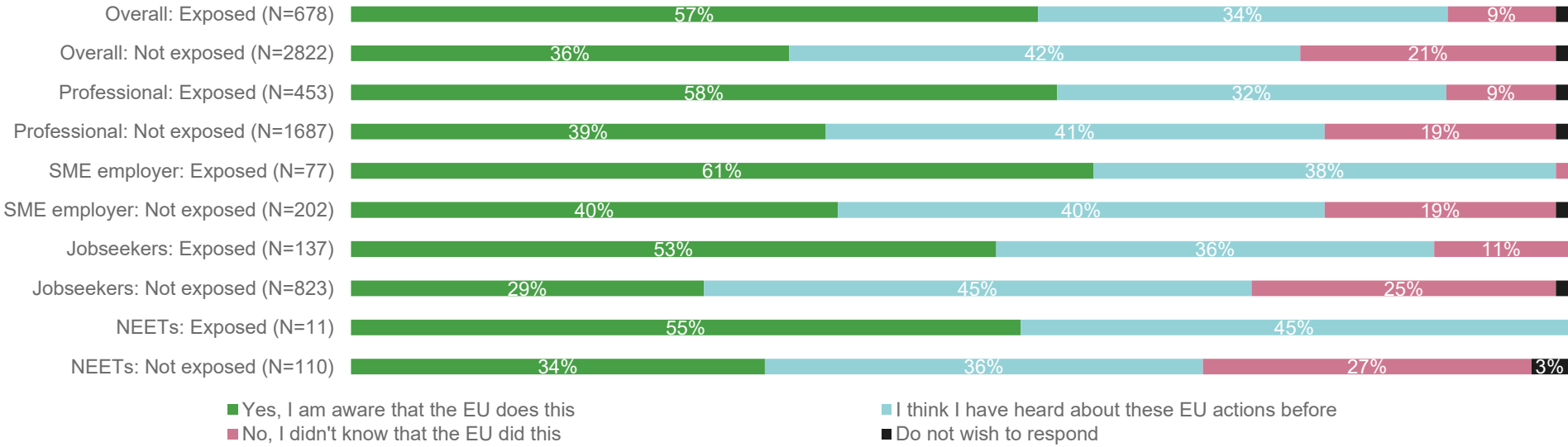


Are you aware of the following?: The EU is promoting actions so that you can provide for you and/or your family



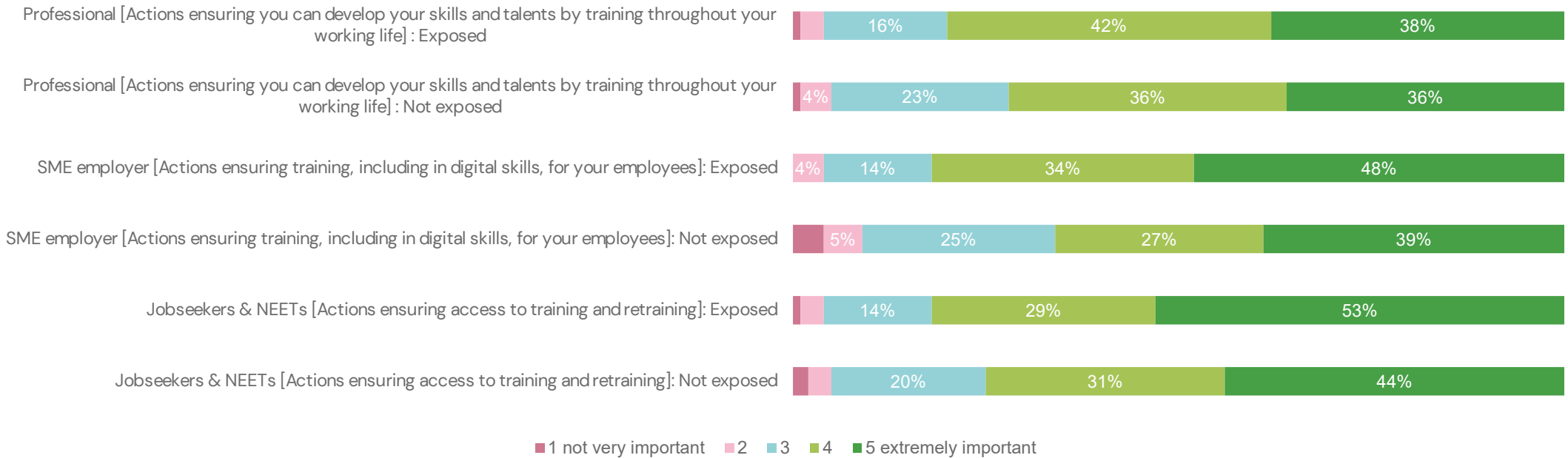


Are you aware of the following?: The EU is promoting actions to strengthen equality (e.g., with regards to gender, age, disabilities)

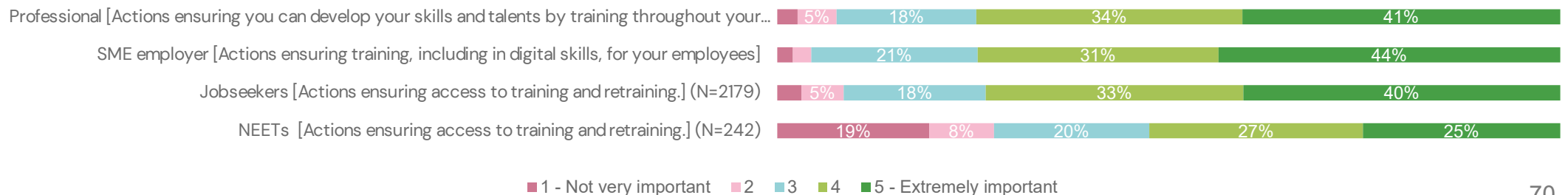




Importance of the following EU values: SKILLS

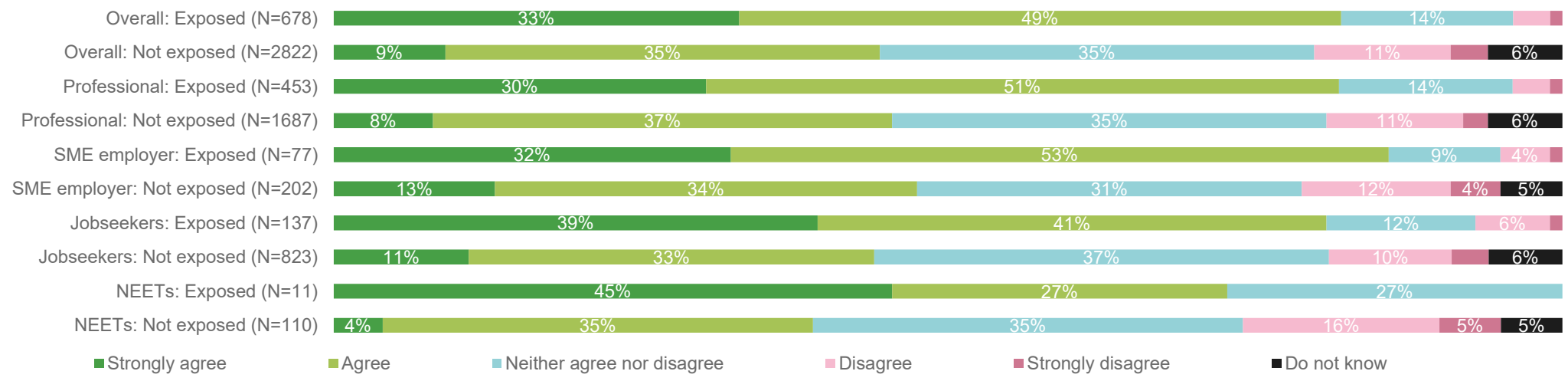


Baseline survey

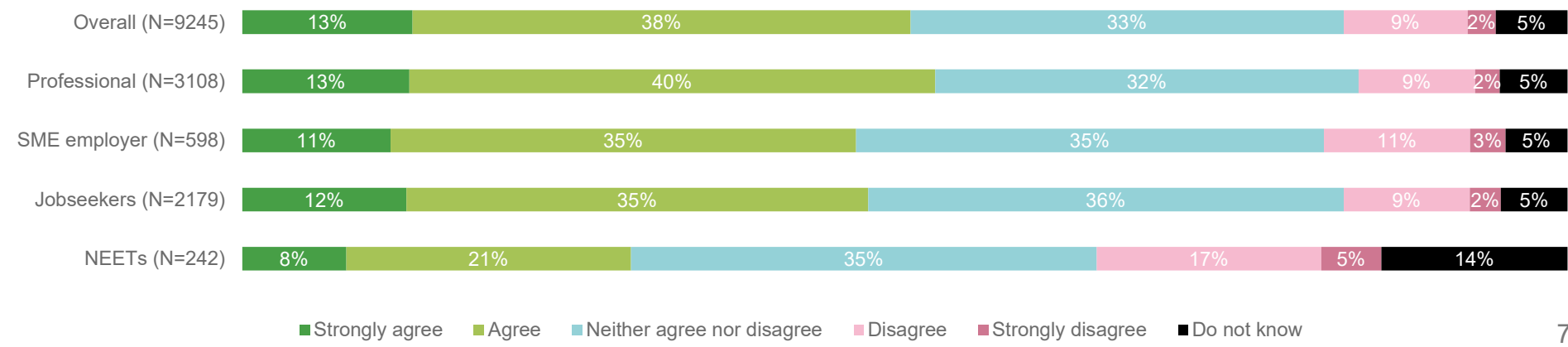




Which of the following statements do you agree with?: EU actions on employment and social affairs have a positive impact on my daily life

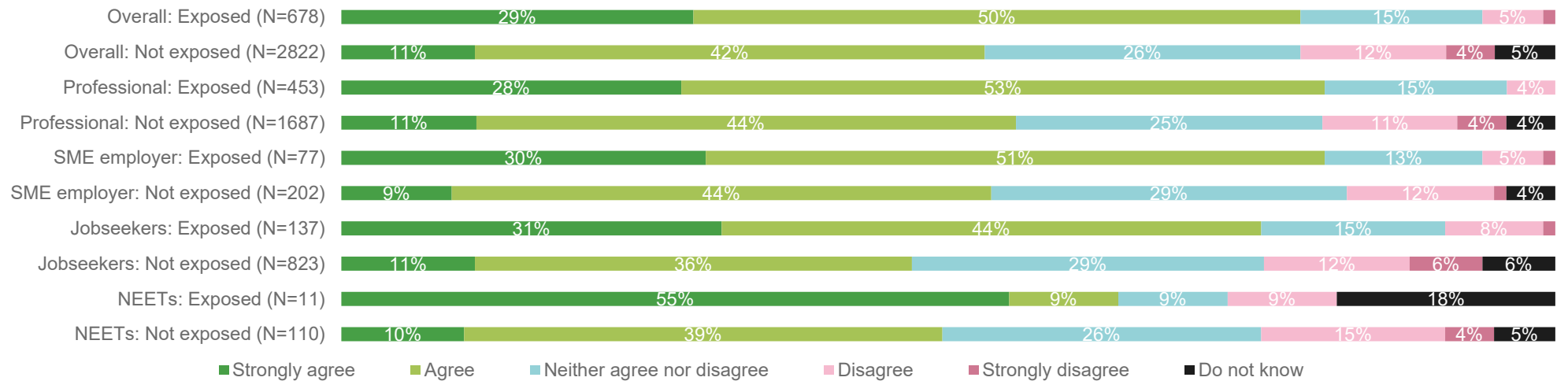


Baseline survey

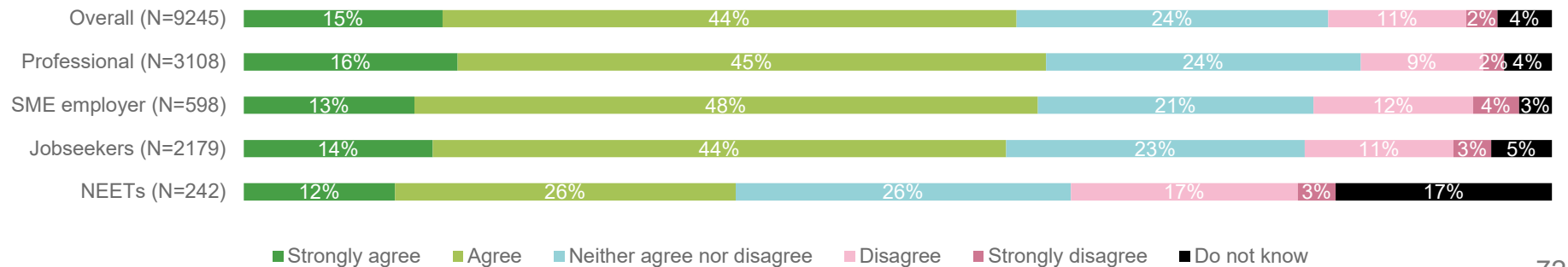




Which of the following statements do you agree with?: I am confident that I can find relevant information on how to exercise my rights (e.g., related to work, income, family, skills, equality) where I live

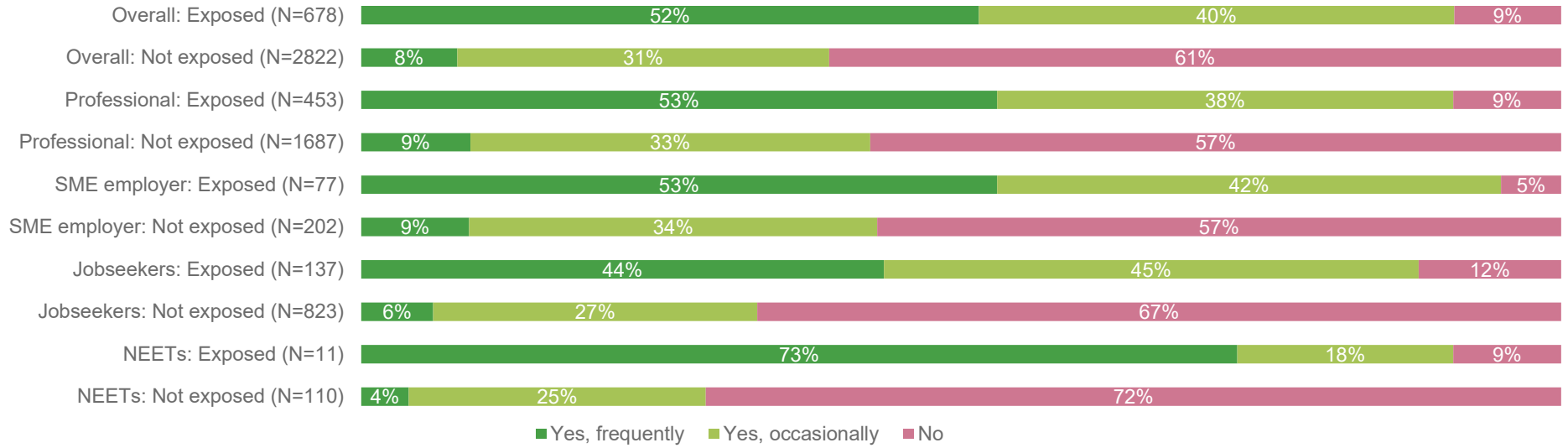


Baseline survey

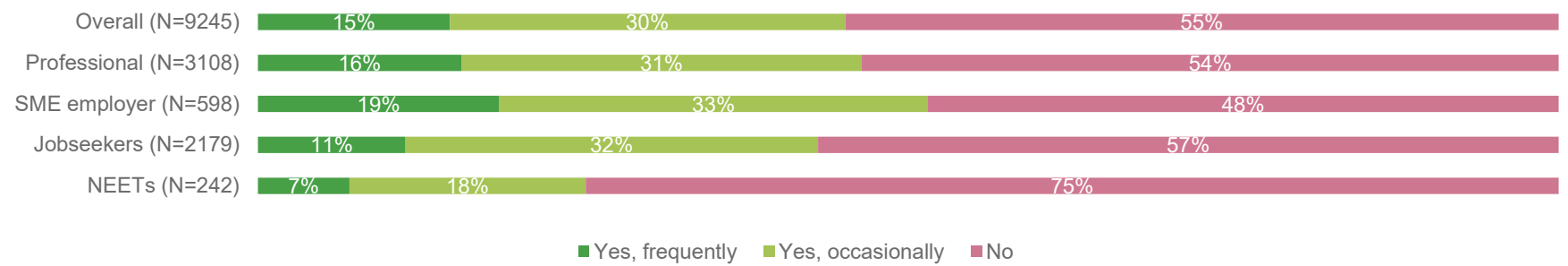




In the past month, did you do any of the following : I searched for info about an EU action

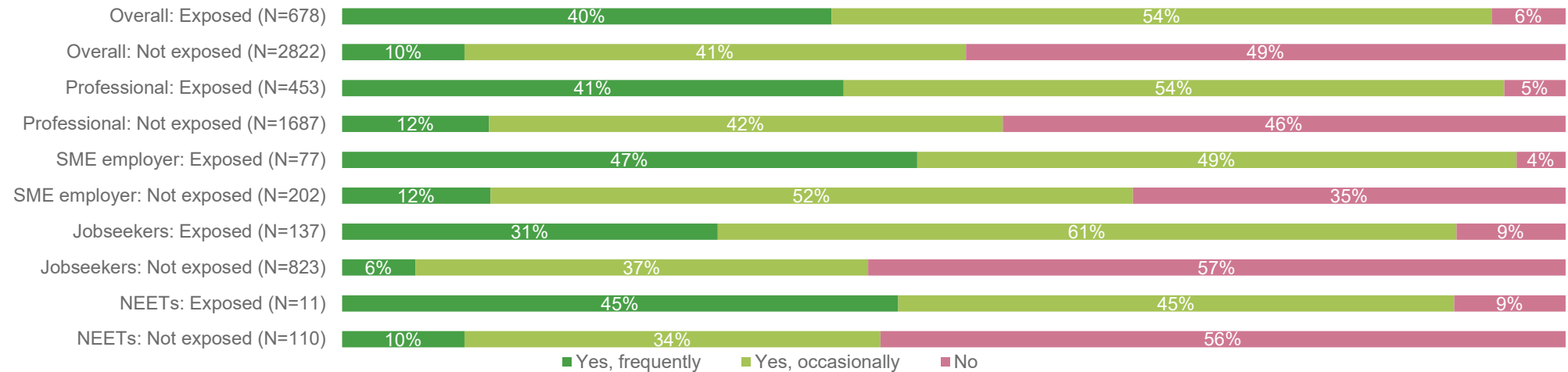


Baseline survey

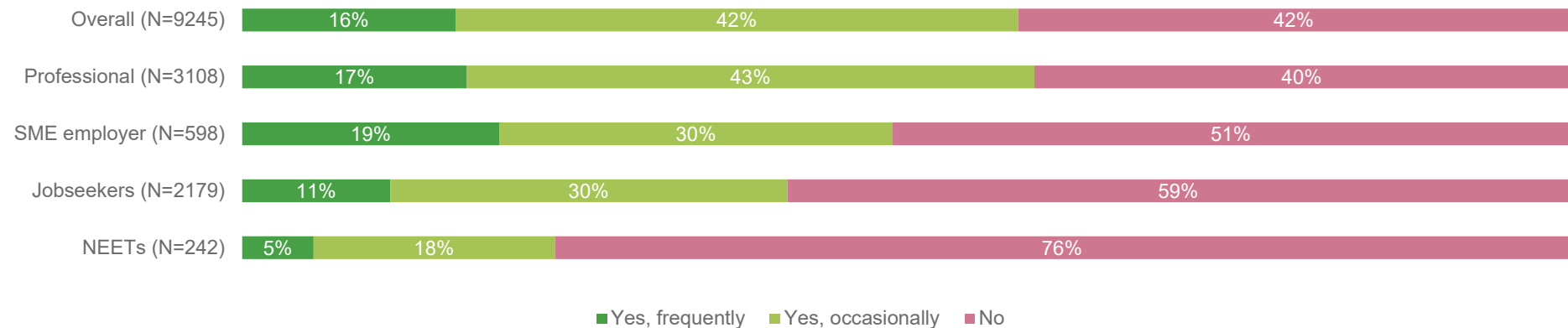




In the past month, did you do any of the following : I read an article about an EU action

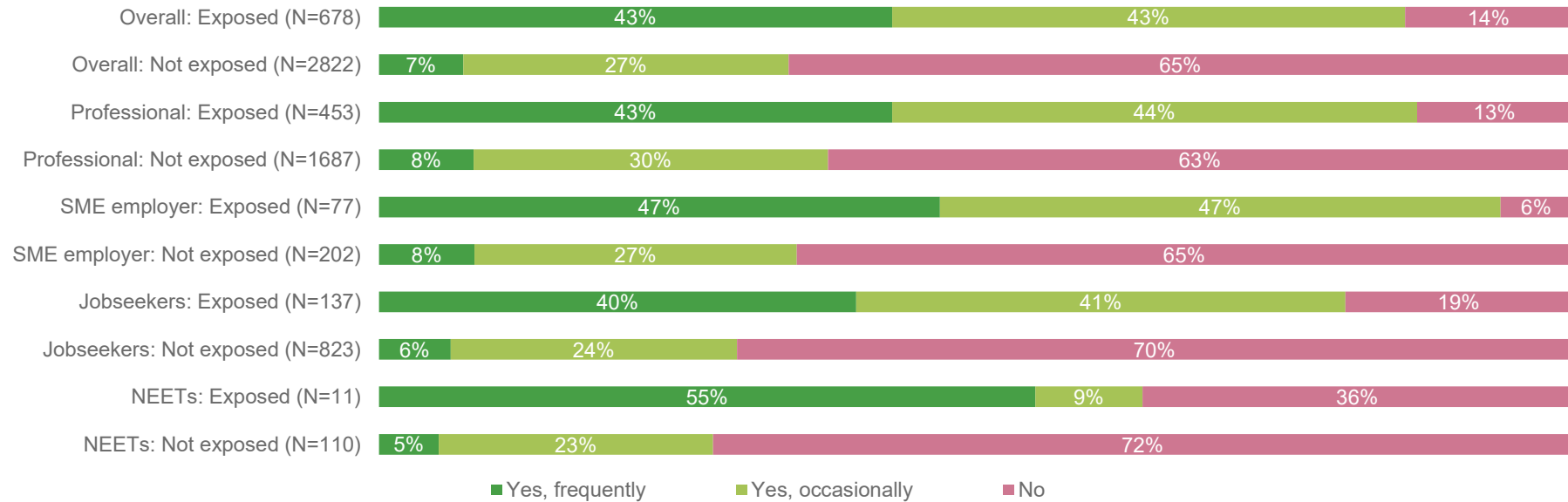


Baseline survey

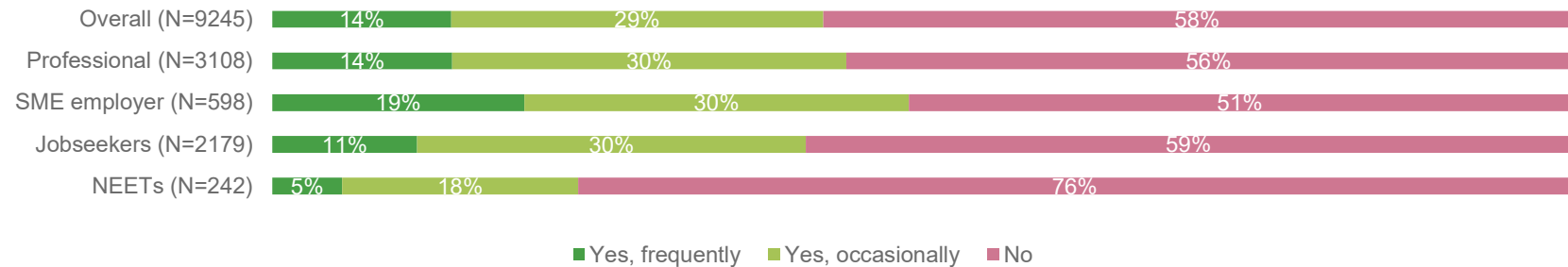




In the past month, did you do any of the following : I visited a website about an EU action

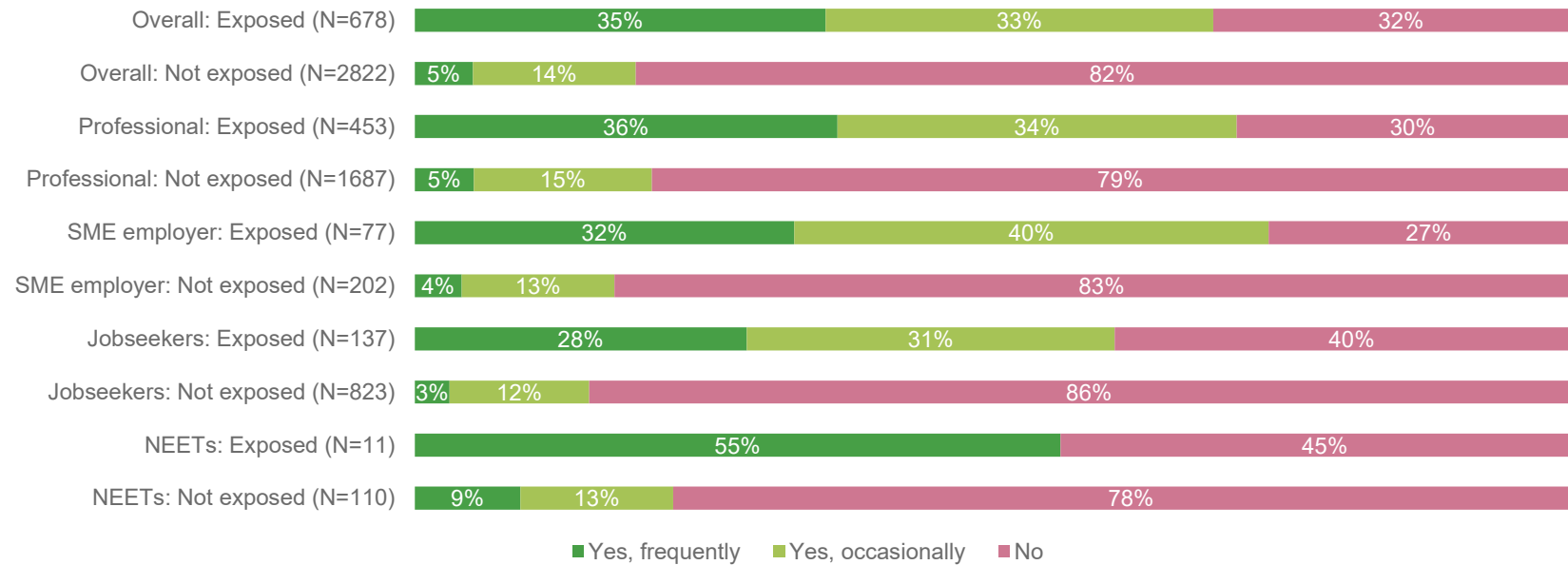


Baseline survey

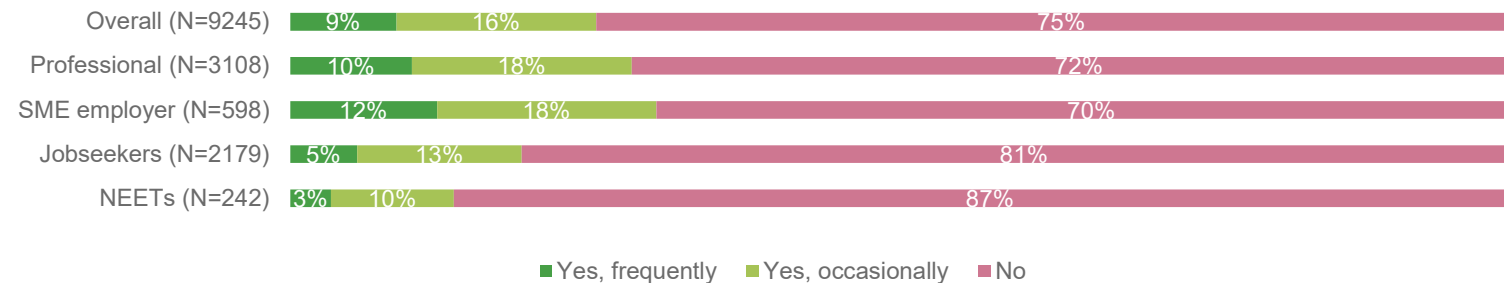




In the past month, did you do any of the following: I contacted an organization that advises about EU actions

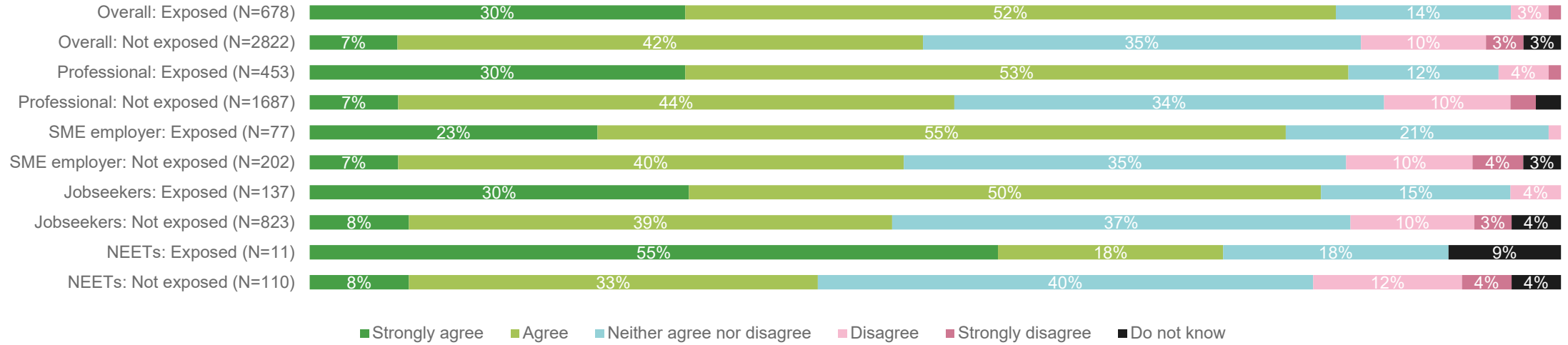


Baseline survey

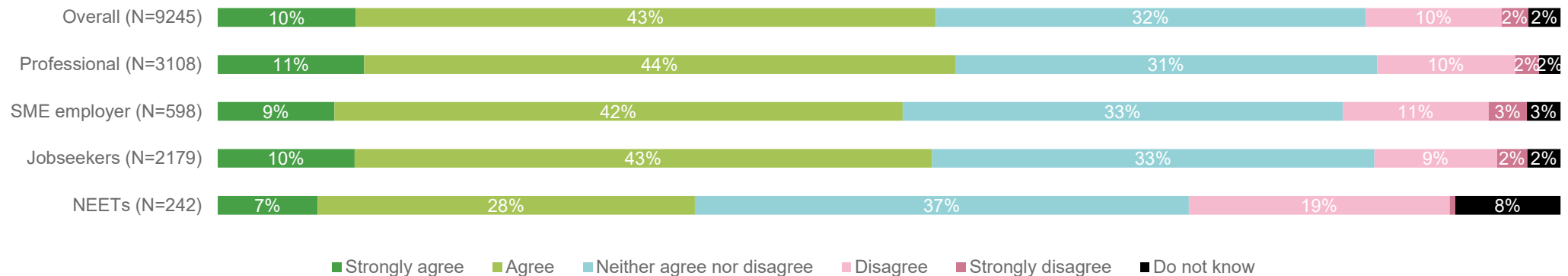




Agreement on the following statements: I trust that the EU supports me

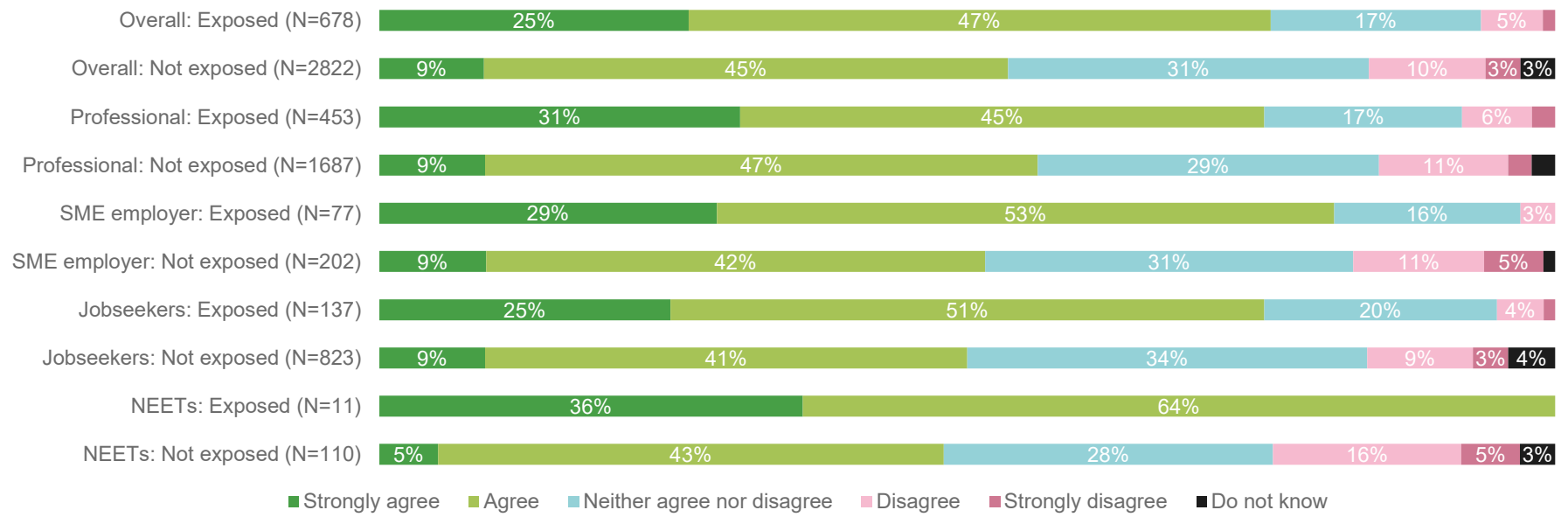


Baseline survey

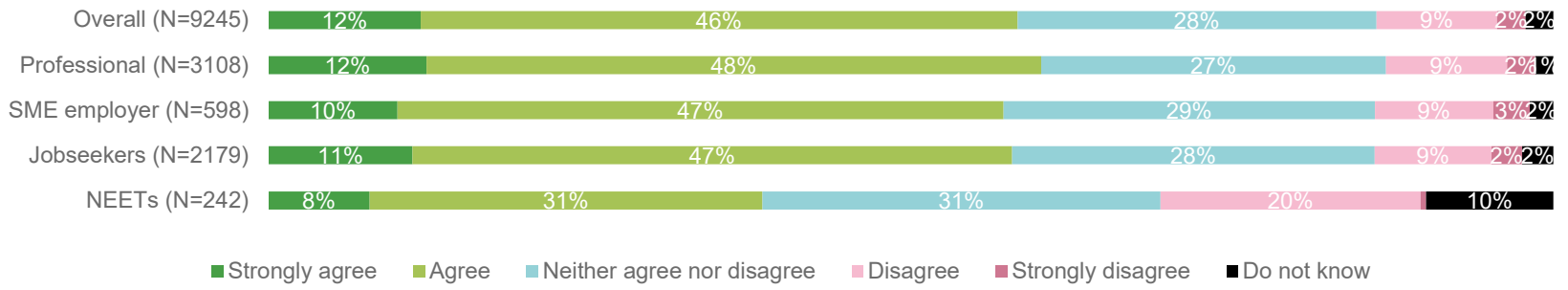




Agreement on the following statements: I trust the EU's actions to improve my life

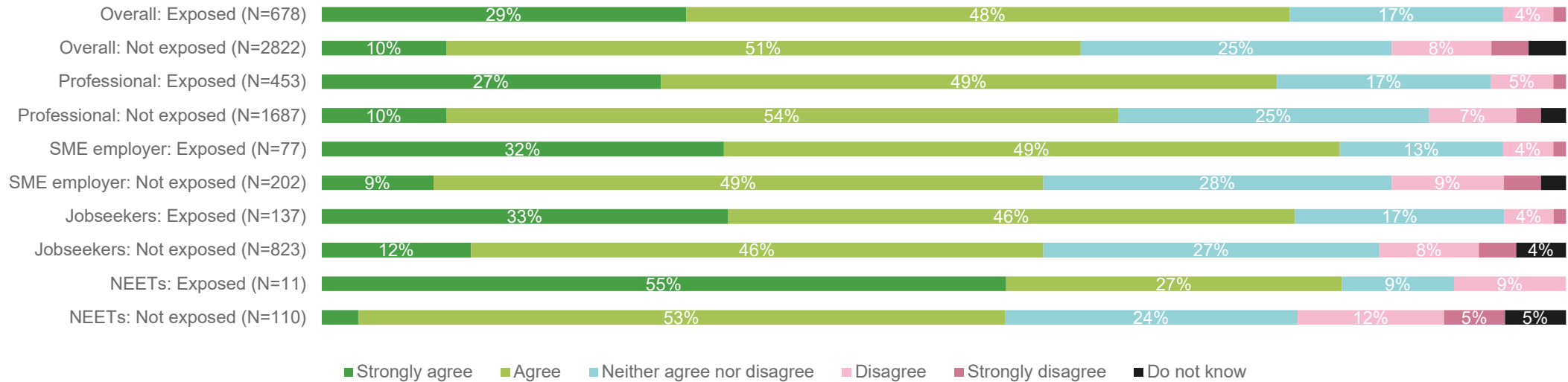


Baseline survey

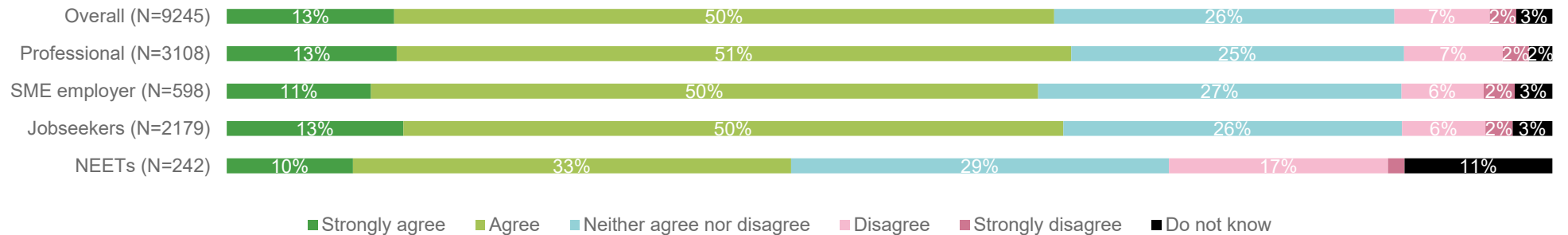




Agreement on the following statements: I trust that the EU is taking actions to improve the social and employment situation of those in the EU

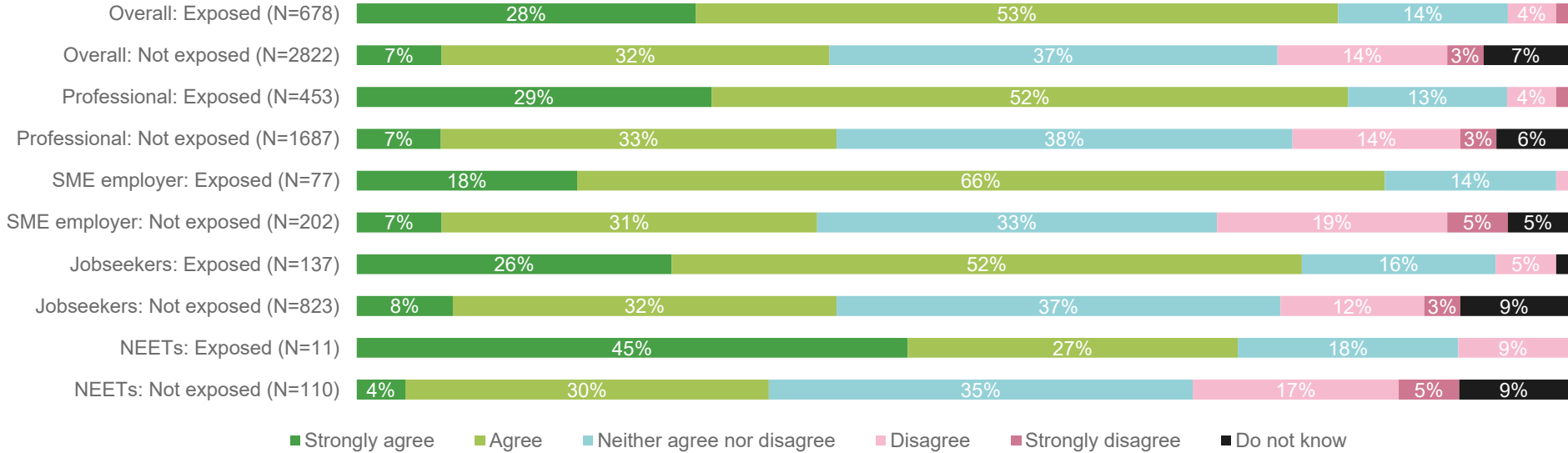


Baseline survey

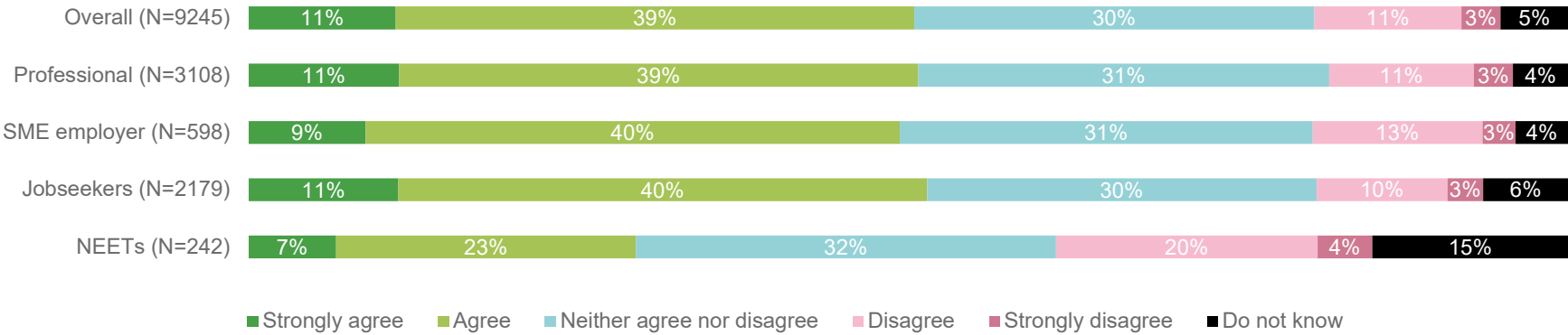




Relevancy of the following actions: The skill-related actions promoted by the EU are relevant to my personal situation

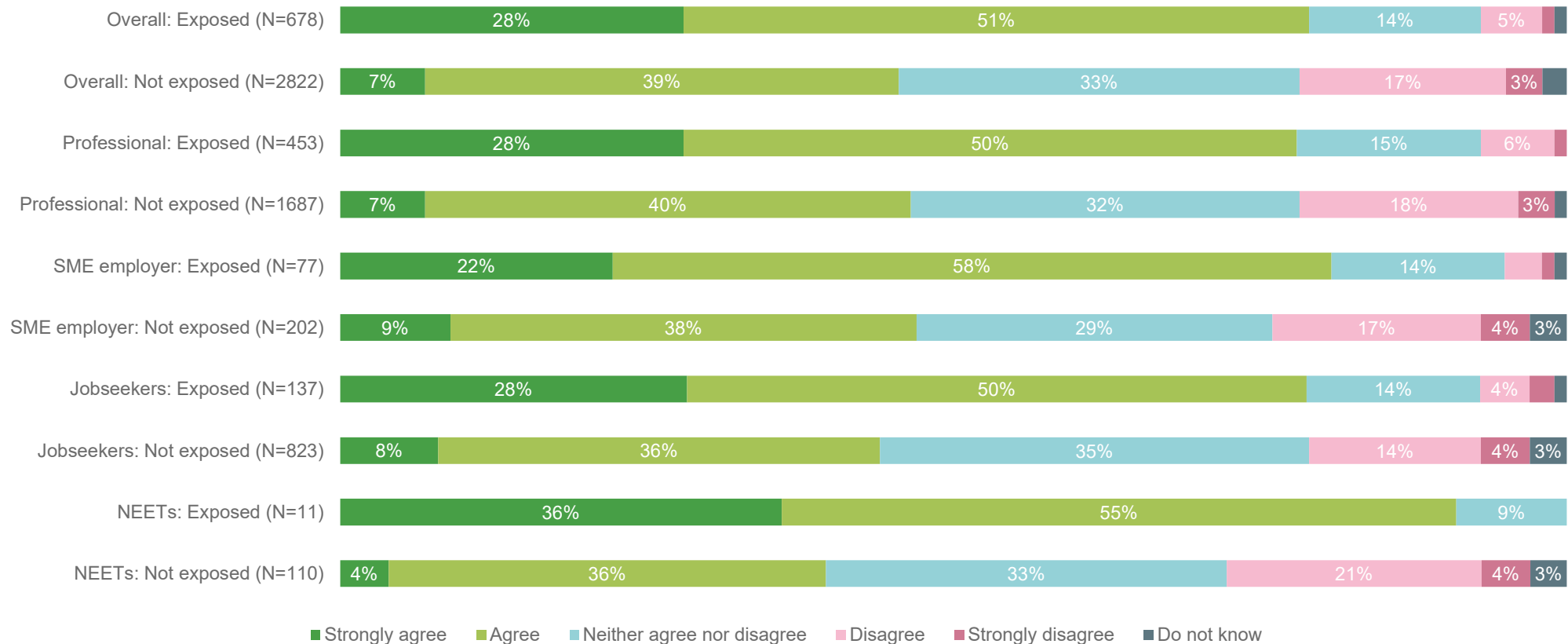


Baseline survey



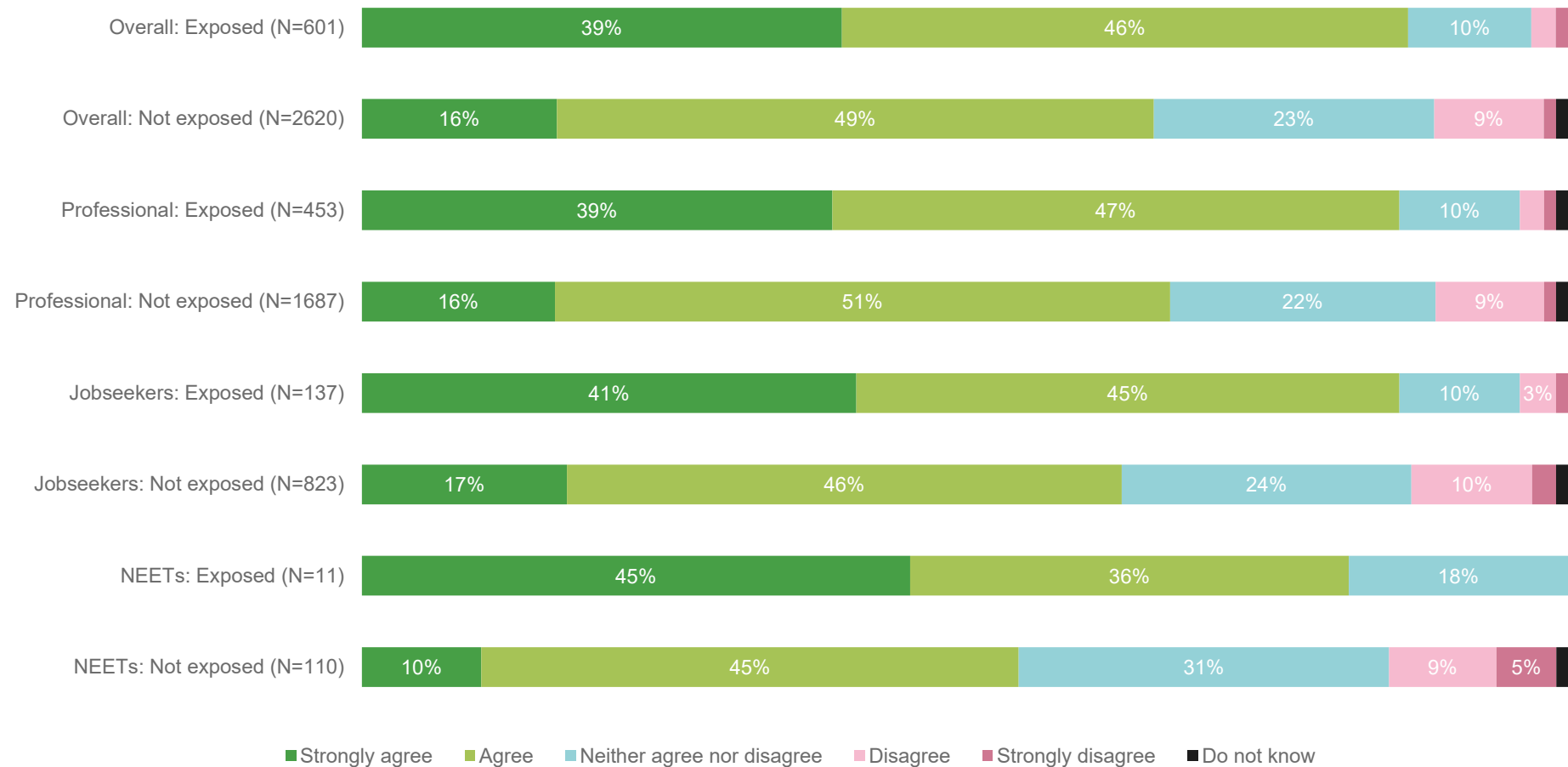


Do you agree with the following statements?: I find this animation/social media post appealing



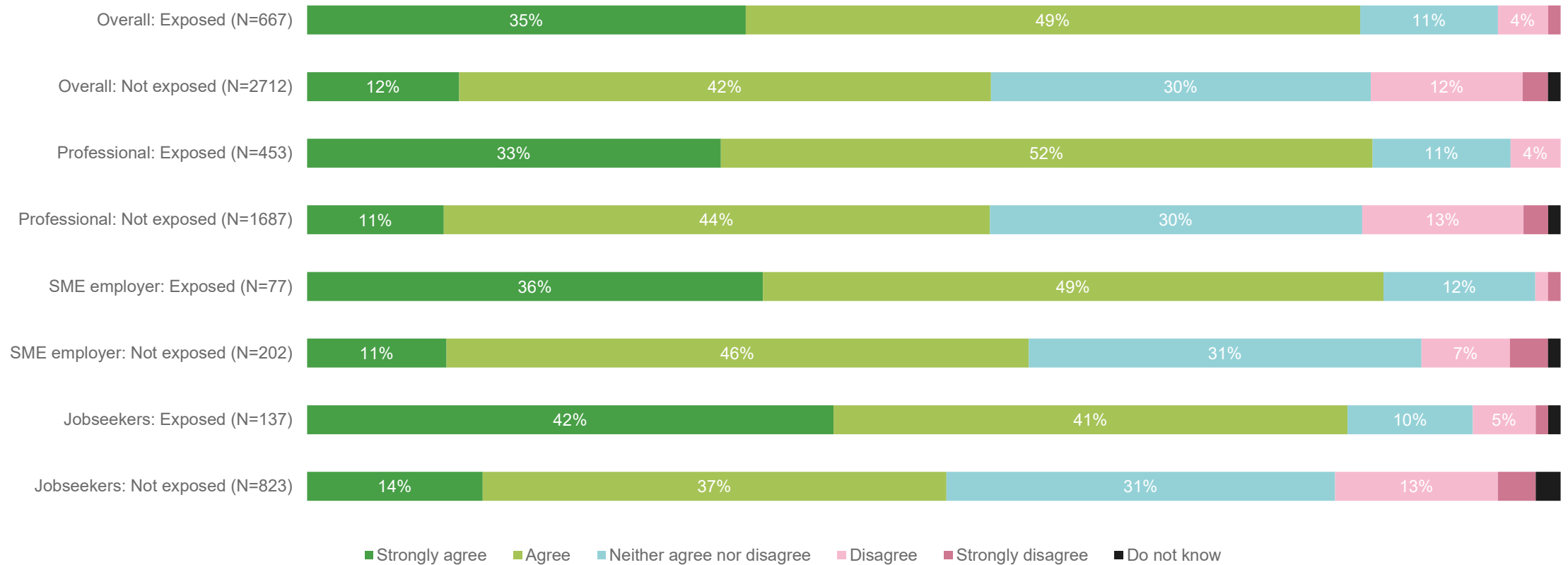


Do you agree with the following statements? (First Jobber): I find this video appealing



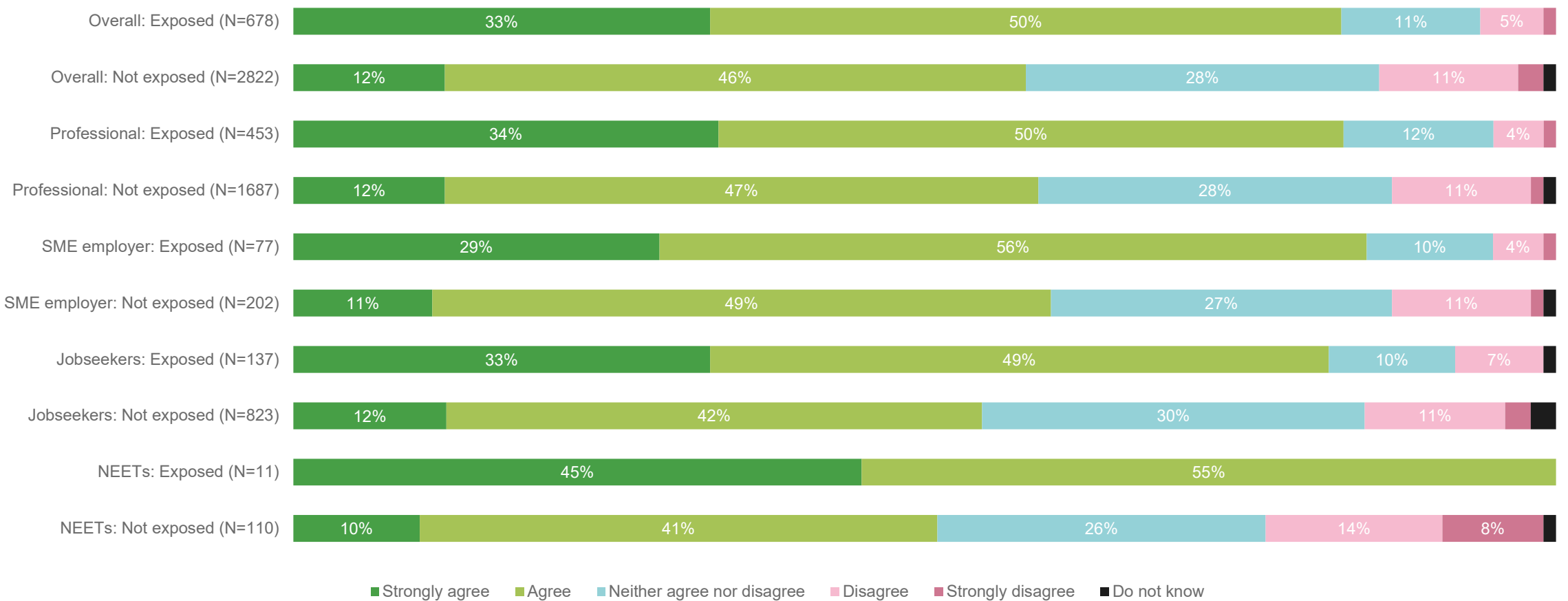


Do you agree with the following statements? (Engineer): I find this video appealing



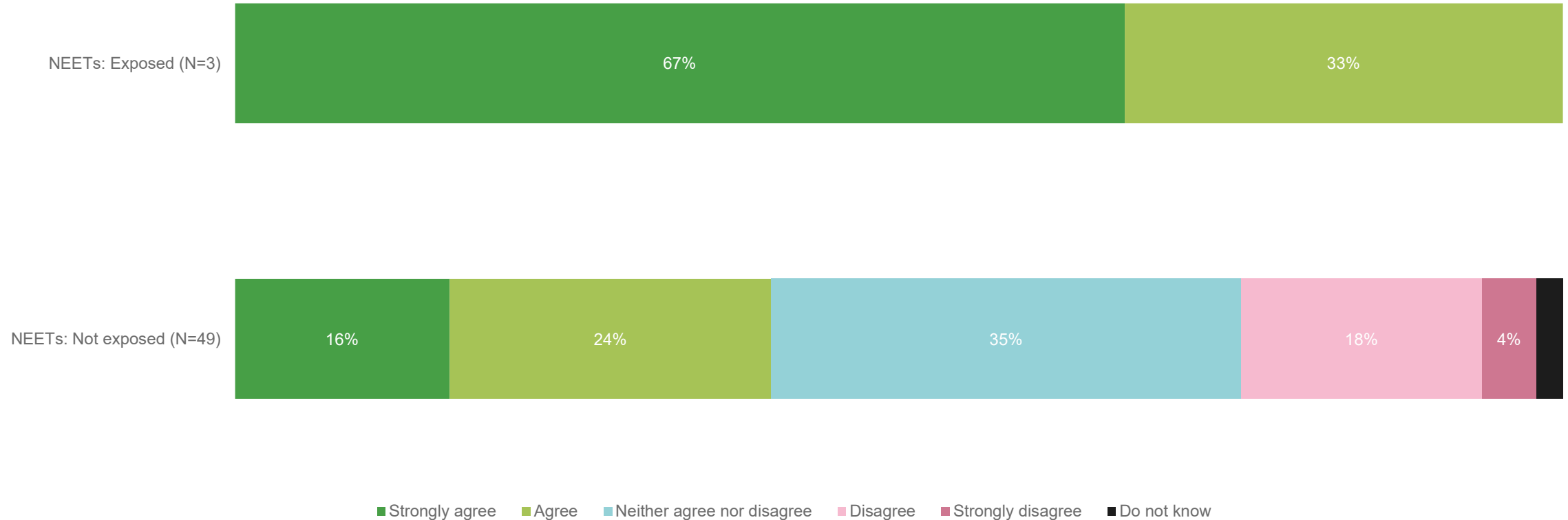


Do you agree with the following statements? (Designer): I find this video appealing



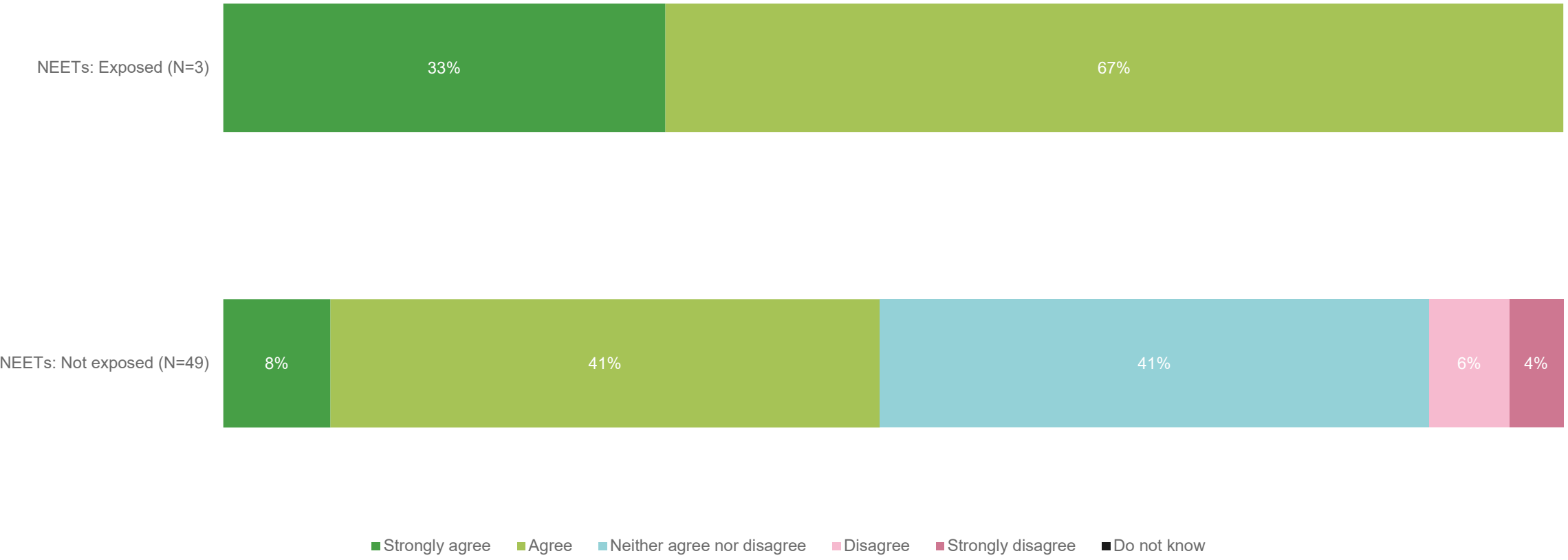


Do you agree with the following statements? (First Twitch asset: Andy): I find this video appealing



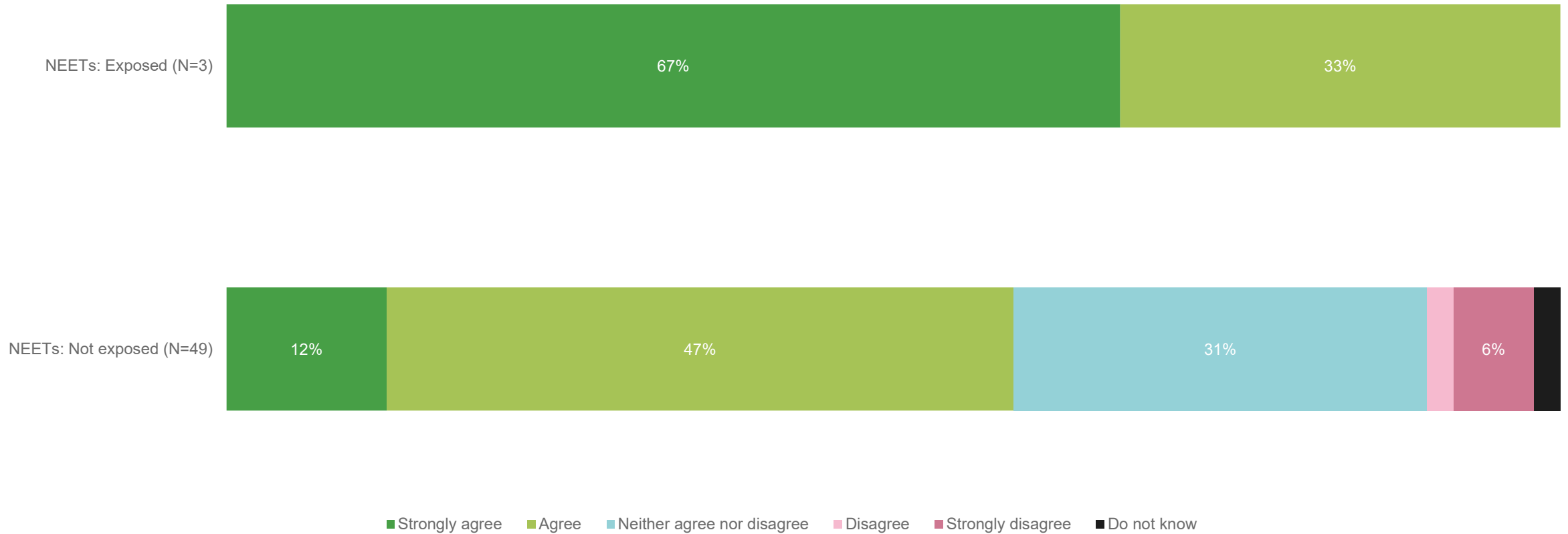


Do you agree with the following statements? (Second Twitch asset: Ana): I find this video appealing





Do you agree with the following statements? (Third Twitch asset: Oliver): I find this video appealing





Where did you learn about the European Year of Skills and the Make it Work campaign?

