



Flash Eurobarometer 480

Briefing Note

Citizens' awareness and perceptions of EU regional policy

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Survey requested by the European Commission,
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The interpretations and opinions contained in it are solely those of the authors.

Flash Eurobarometer 480 – Kantar



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Survey conducted by Kantar on behalf TNS political & social at the request of the European Commission,
Directorate-General for Regional and Urban Policy

Survey co-ordinated by the European Commission, Directorate-General for Communication
(DG COMM "Media Monitoring and Eurobarometer" Unit)

Project title

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“Citizens’ awareness and perceptions of EU regional policy”
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INTRODUCTION

Cohesion policy invests in all EU regions to reduce inequalities both between Member States and between regions within them. It targets all regions and cities in the European Union to support job creation, business competitiveness, economic growth, improved quality of life and sustainable development and to improve citizens' quality of life.

Regional policy is the EU's main instrument of investment: at €351.8 billion, it accounts for approximately a third of the EU budget for the 2014-2020 period¹. Through several funds – most prominently the European Regional Development Fund (ERDF), the European Social Fund (ESF) and the Cohesion Fund – the EU co-finances projects that enable less-developed regions and countries to fulfil their economic potential. Among these projects are investments in transport and communication infrastructures, support for small and medium-sized enterprises and the modernisation of educational and health systems. It is also a major instrument for the realisation of the EU's "Europe 2020" growth goals, which aim to create growth and jobs through innovation, deal with the problems of climate change and energy dependence and reduce poverty and social exclusion.

Most funding available under the policy is directed towards "less developed regions", whose GDP is lower than 75% of the EU average, and "transition regions", whose GDP is between 75% and 90% of the EU average. While individual Member States and their regions are the main recipients of co-financing for development projects, the EU has also sought to promote cross-border cooperation in macro-regions such as the Baltic Sea region in an effort to promote a shared approach to driving growth in these regions.

This study is part of a series of studies that examines Europeans' awareness of and attitudes towards EU Regional Policy. It is based on four previous surveys: the Flash Eurobarometer 452 (FL452)² study of March 2017; the Flash Eurobarometer 423 (FL423)³ study of June 2015; the FL384⁴ study of September 2013 and the FL298⁵ study of June 2010. It begins by asking whether respondents have heard about any EU co-financed projects in their local area and, if so, whether they believe those projects have had a positive or negative impact. Respondents are then asked about their familiarity with the EU's two regional funds and whether they have benefited personally from an EU-funded project. It also provides information on the sources of information used by respondents in finding out about the policy. The survey then looks at priorities for EU Regional Policy from the citizen perspective, asking respondents which geographical regions and areas of investment the EU should target and who should take decisions about regional investments. It concludes by looking at public awareness of cross-border cooperation, including *four EU macro-regional strategies in the Baltic Sea, along the Danube, the Adriatic and Ionian Sea regions and the Alpine region*, Interreg and EU outermost regions.

This Briefing Note gives the main findings of this Flash Eurobarometer survey. Detailed results can be found in the full Report.

*We wish to thank the people throughout the European Union
who have given their time to take part in this survey.
Without their active participation, this study would not have been possible*

¹ http://europa.eu/pol/pdf/flipbook/en/regional_policy_en.pdf

² <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/FLASH/surveyKy/2145>

³ <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/FLASH/surveyKy/2055/p/2>

⁴ <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/FLASH/surveyKy/1075/p/2>

⁵ <https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/Survey/getSurveyDetail/instruments/FLASH/surveyKy/859/p/4>

MAIN FINDINGS

Four in ten respondents have heard about EU co-financed projects in their local area and over eight in ten of these say that these projects had a positive impact on the development of their city or region

- Four in ten respondents (40%) have heard about EU co-financed projects in the area where they live, an increase in awareness of five percentage points since the last survey in 2017.
- Over eight in ten respondents believe that the impact has been positive (81%), a figure that has remained stable since 2010. In ten countries at least nine in ten respondents think that these projects had a positive impact in their city or region.
- A majority of respondents (53%) have heard of at least one of the two EU development funds mentioned, the European Regional Development Fund (ERDF) and the Cohesion Fund..
- Nearly three in ten respondents (28%) say they have benefited from a project funded by either the European Regional Development Fund (ERDF) or the Cohesion Fund. This represents a rise of 4 pp since the last survey in 2017.

The main sources of information about EU co-financed projects are the TV and newspapers

- Television remains the most common source of information about EU co-financed projects, with 48% of respondents mentioning it. In particular, for 22% of respondents, television is the first source of information about EU regional policy.
- The internet is the third most mentioned source of information (37%), but it has increased by 12 percentage points compared to September 2010.

A majority of respondents agree that the EU should continue to invest in all its regions

- A majority of respondents (58%) think that the EU should continue to invest in all regions. This result is the highest ever recorded since 2010 (+11 pp).
- Nearly seven in ten respondents (69%) identify regions with high unemployment as priority for investment under the EU regional policy .
- Almost the same share of respondents identifies as priority deprived urban areas (54%) and remote rural or mountain areas (52%). Both items registered an increase since June 2015 (respectively +6 pp and +11 pp).

Nine in ten respondents consider the investment in education, health or social infrastructure and in the environment important for their city or region

- At least nine in ten respondents consider education, health or social infrastructures (91%) and environment (90%) important areas for EU regional policy investment; 87% think the same regarding renewable and clean energy.

The regional or local level is the most mentioned as the more appropriate for taking decisions about EU regional policy

- Three in ten respondents (31%) say that decisions about EU regional policy projects should be taken at the regional level, whereas almost one in five (17%) think that these decisions should be taken at EU level. These results are stable when compared with those of 2017.

A quarter of respondents are aware that EU regional funding fosters cross-border cooperation

- Three quarters of respondents (74%) are not aware of cooperation between regions in different countries due to EU regional funding.
- There are no significant changes compared with 2017, though awareness has been steadily increasing since 2010.

The majority of respondents know there is a European Solidarity Fund to respond to natural disasters while just over one in ten have heard of Interreg

- Six in ten (60%) are aware of the existence of a European Solidarity Fund to respond to natural disasters, but only two in ten know if it was used or not in their country.
- Over a tenth of respondents have heard of Interreg (14%), though a tenth (11%) do not know exactly what it is.
- Overall, respondents from countries where an Interreg program is running are also the most aware of the EU strategy to promote cooperation between countries. This is especially true for the cooperation around the Baltic Sea, which is the most known at the EU level (15%)

One in five respondents can name at least one EU outermost region

- Across EU, the most known outermost region is the Canary Islands (10%), then Martinique (6%), French Guiana, Guadeloupe, Réunion (all 5%), Madeira and Azores (4%). Over four in ten respondents (43%) are unable to spontaneously name any outermost region.

I. AWARENESS OF EU REGIONAL POLICY AND PERCEIVED BENEFITS

1. Awareness and perceived impact of EU regional support

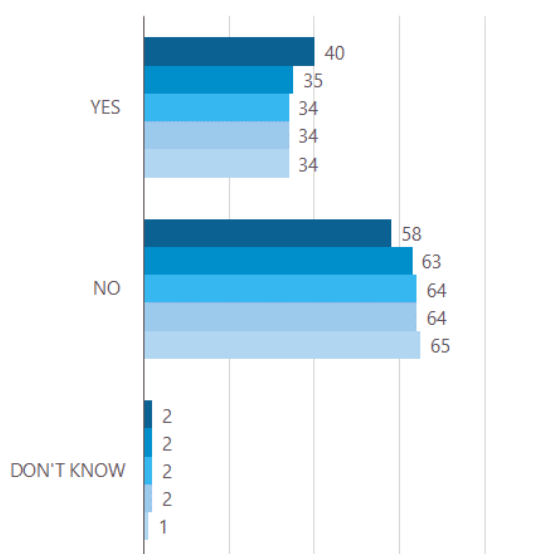
Four in ten respondents have heard about EU co-financed projects in their local area

Respondents were first asked if they have heard of any EU co-financed projects to improve the area in which they live⁶.

Four in ten respondents say they have heard about EU co-financed projects in the area where they live, while just under six in ten (58%) say they have never heard of any of such projects. EU-wide awareness has risen by five percentage points since the last survey in 2017, following a general trend of rising awareness since the first survey in 2010.

Q1A Europe provides financial support to regions and cities. Have you heard about any EU co-financed projects to improve the area where you live? (% - EU)

■ June 2019 ■ March 2017 ■ June 2015 ■ Sept. 2013 ■ June 2010



Base: all respondents (n= 27.144)

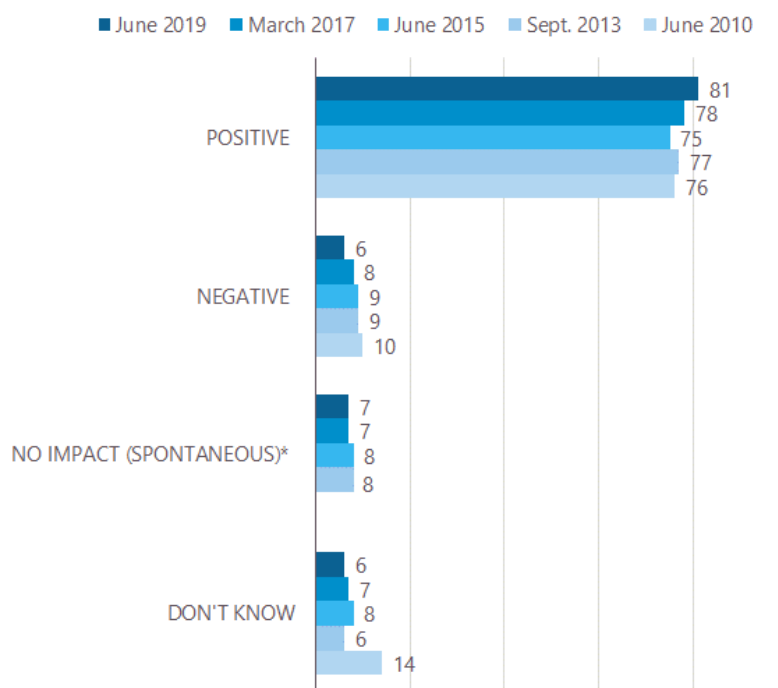
⁶ Q1a Europe provides financial support to regions and cities. Have you heard about any EU co-financed projects to improve the area where you live?

Over eight in ten respondents say that the impact of EU co-financed projects on the development of their city or region has been positive

Respondents who said they have heard of EU co-financed projects were then asked whether this support has had a positive or a negative impact on the development of their city or region⁷.

Over eight in ten respondents say that the impact has been positive (81%), while only 6% think it has been negative and 7% spontaneously say there has been no impact. Overall, the proportion of respondents who say the impact of these projects has been positive has risen slightly since 2010.

Q1C Taking into consideration all the projects you have heard about, would you say that this support has had a positive or negative impact on the development of your city or region?
(% - EU)



Base: respondents who have heard of EU co-financed projects (n= 10.788)

⁷ Taking into consideration all the projects you have heard about, would you say that this support has had a positive or negative impact on the development of your city or region?

* This answer option was not included in the study of June 2010.

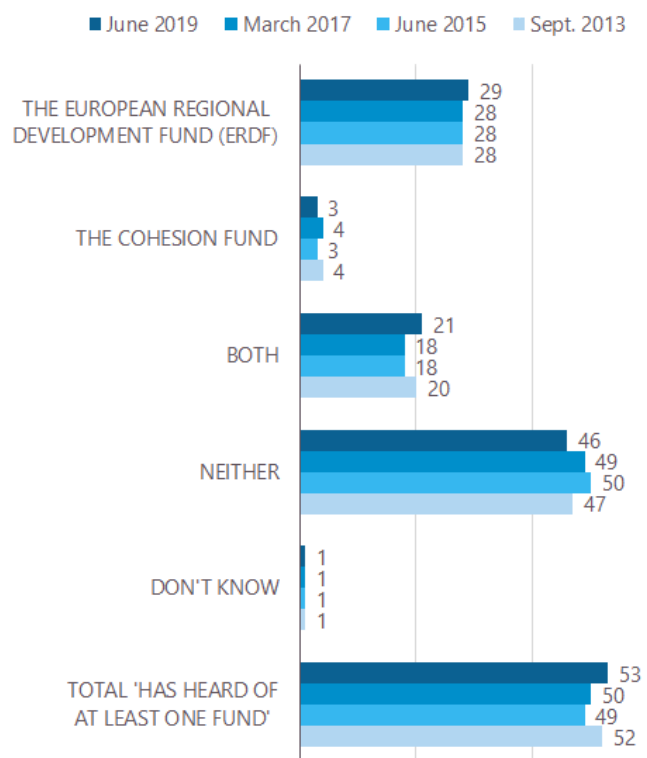
2. The European Regional Development Fund and the Cohesion Fund

A majority of respondents have heard of at least one of the two EU development funds and nearly a fifth have heard of both

Respondents were next asked whether they have heard of two EU funds - the European Regional Development Fund (ERDF) and the Cohesion Fund⁸.

Over half the respondents (53%) have heard of at least one of the funds. Close to three in ten (29%) know of the **European Regional Development Fund (ERDF)**, while only 3% have heard of the **Cohesion Fund**. Around a fifth of respondents (21%) have heard of both the ERDF and the Cohesion Fund and just under half of the respondents (46%) say that they have not heard of either. These results have remained relatively stable since September 2013.

Q2 Have you heard about the following funds?
(% - EU)



Base: all respondents (n= 27.144)

⁸ Q2 Have you heard about the following funds

Almost three in ten respondents say they have benefited from EU-funded regional development projects

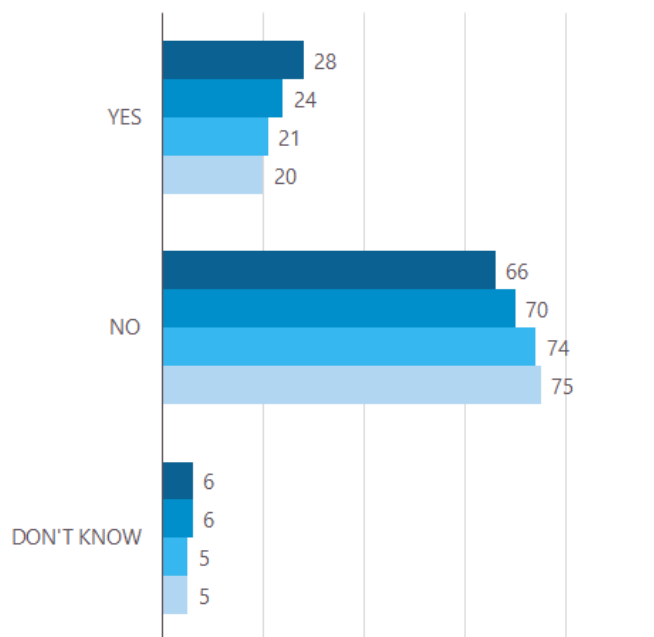
Respondents who said that they have heard of at least one of the two funds were then asked whether they have benefited in their daily life from a project funded by the European Regional Development Fund (ERDF) or the Cohesion Fund⁹.

Nearly three in ten respondents (28%) say they have benefited from a project funded by one of these schemes, while two thirds of those surveyed (66%) say they have not.

The proportion of individuals who **have benefited** from a project funded by the European Regional Development Fund or the Cohesion Fund has steadily increased since the first time this question was asked, in September 2013 (28%, +4 pp since 2017, +3 pp since 2015 and +1 pp since 2013). At the same time, the proportion of those who say they **have not benefited** has declined (66%, -4 pp since 2017, -, -4 pp since 2015 and -1 pp since 2013).

Q3 Have you benefited in your daily life from a project funded by the European Regional Development Fund (ERDF) or the Cohesion Fund?
(% - EU)

■ June 2019 ■ March 2017 ■ June 2015 ■ Sept. 2013



Base: respondents who have heard of at least one of the two funds (n= 14.484)

⁹ Q3 Have you benefited in your daily life from a project funded by the European Regional Development Fund (ERDF) or the Cohesion Fund?

3. Sources of information on EU regional policy

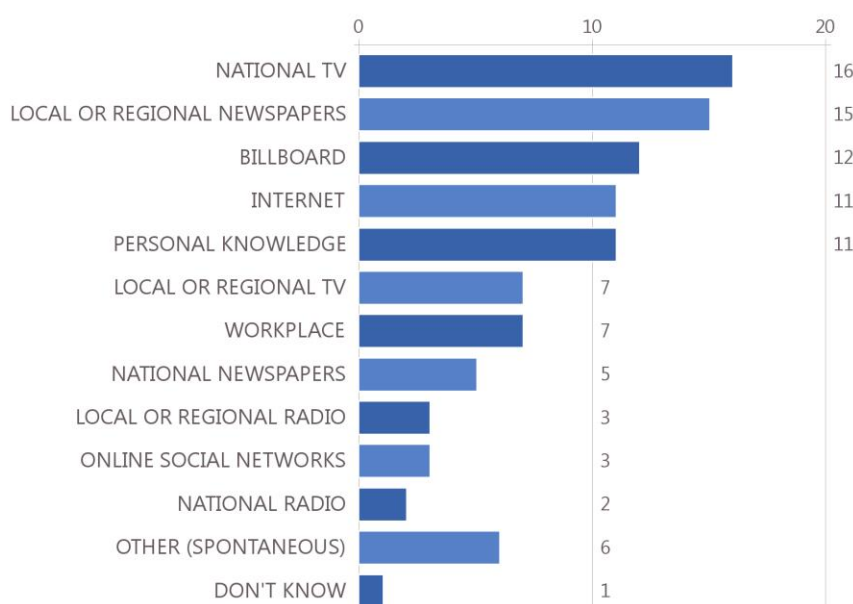
Close to one in six respondents say their first source of information about EU co-financed projects is national TV

Respondents who said they have heard about an EU co-financed project were asked where they had done so. They were asked to say where they have first heard about the project¹⁰, and then to name any other sources through which they have heard about it¹¹.

National TV is the most-mentioned first source of information about EU co-financed projects (16%), closely followed by **local or regional newspapers** (15%), **billboards** (12%), **the Internet** and personal knowledge (both 11%). Less than 10% mention any of the other media as their first source of information on these regional projects.

Q1B1 Where did you hear about it? Firstly?

(IF HAVE HEARD OF EU CO-FINANCED PROJECTS (CODE 1 IN Q1A)) (% - EU)



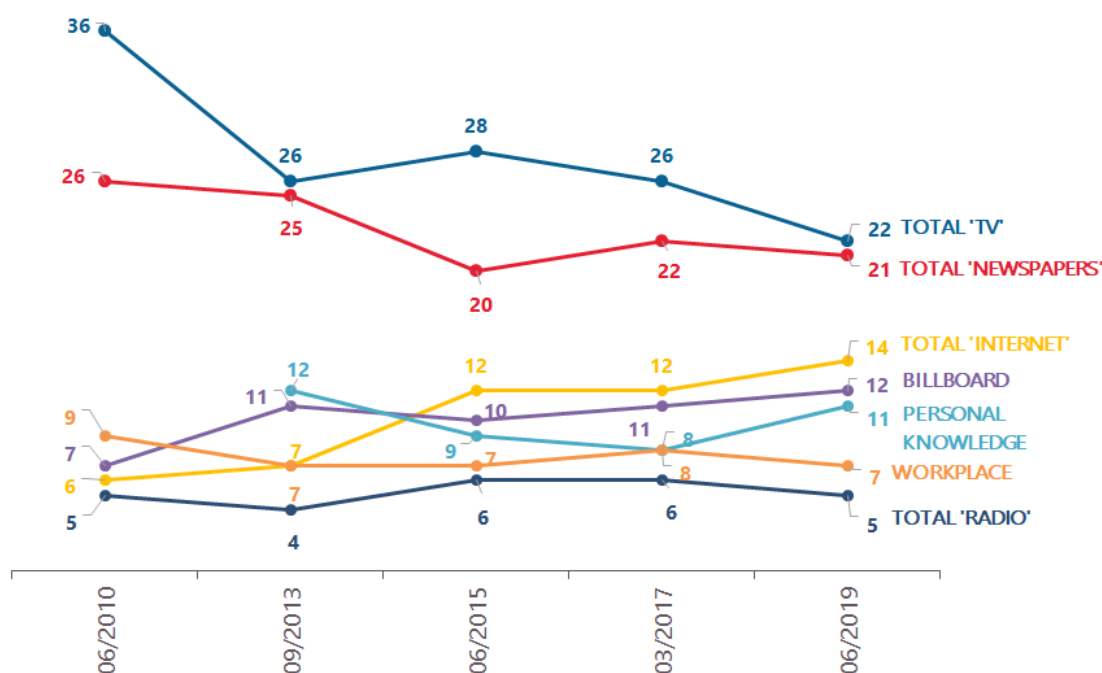
Base: respondents who have heard of EU co-financed projects (n= 10.788)

¹⁰ Q1b1 Where did you hear about it? Firstly?

¹¹ Q1b2 And then? (MULTIPLE ANSWERS POSSIBLE)

Since the first survey in 2010, there have been some significant changes in the proportions of respondents giving each answer. In particular, the proportion of respondents saying they first get information about EU co-financed projects from TV has fallen from over a third in 2010 (36%), to just over a fifth in 2019 (22%), while the proportion saying they get such information from newspapers has fallen from a quarter (26%) to a fifth (21%). Conversely, the proportion of respondents who rely on the Internet as their primary source of such information has more than doubled, from 6% in 2010 to 14% in 2019, while the proportion who get this information from billboards has also increased (12%, +5 pp). For other media, the proportions have remained stable.

Q1B1 Where did you hear about it? Firstly?
(% - EU)



Base: respondents who have heard of EU co-financed projects (n= 10.788)

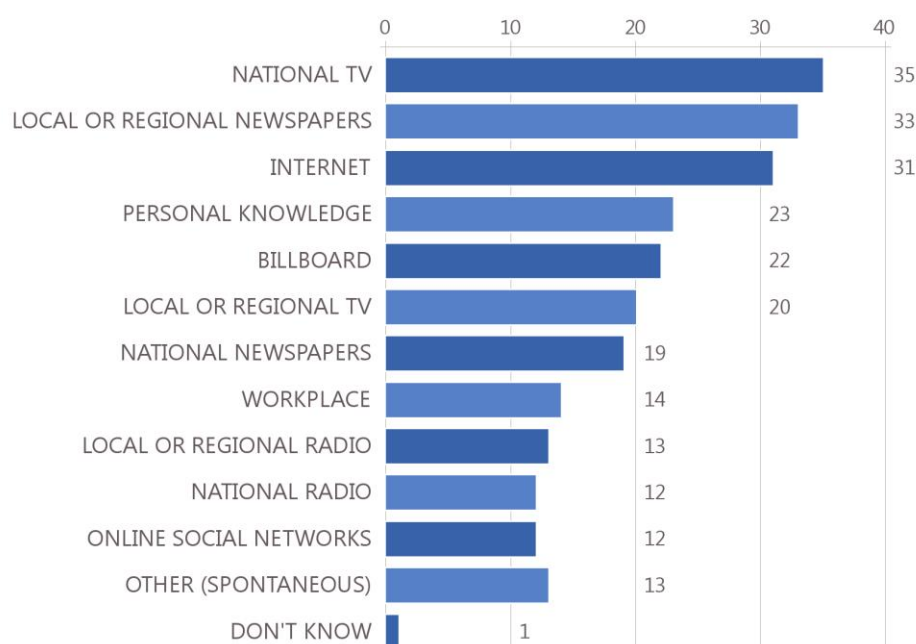
When first and subsequent responses are aggregated¹², **national TV** remains the most frequently mentioned source, with over a third of respondents (35%) saying that they get their information from this source.

The second most common source, again, is **local or regional newspapers**, mentioned by a third (33%) of respondents, while a fifth (19%) also mention **national newspapers**. The **Internet** is mentioned by three in ten respondents (31%).

Other sources of information are less common. At least one in five respondents mention **personal knowledge** (23%), **billboards** (22%) and **local or regional TV** (20%). Fewer respondents mention their **workplace** (14%), **local or regional radio** (13%) or **national radio** (12%), which is the least common source of information about EU co-financed projects alongside **online social networks** (12%).

Q1bT Where did you hear about it? First? And then?

(IF HAVE HEARD OF EU CO-FINANCED PROJECTS (CODE 1 IN Q1A)) (% - EU)



Base: respondents who have heard of EU co-financed projects (n= 10.788)

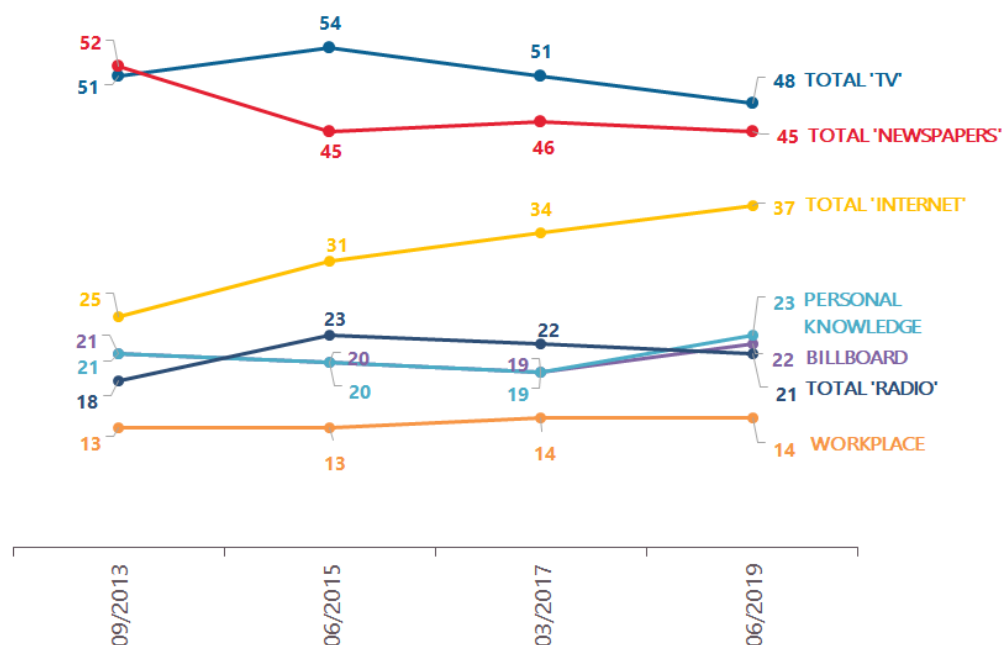
¹² Question Q1bT combines the results of Q1b1 (primary source of information on EU co-financed projects) and those of Q1b2 (other sources on information on EU co-financed projects)

While the proportions of those giving radio, billboards, workplace, personal knowledge and TV have stayed quite stable since 2013, the proportion of those who cite newspapers has fallen considerably – from five in ten in 2013 (52%) to just over four in ten in 2019 (45%).

Conversely, the proportion of respondents saying they heard about EU co-financed projects from the Internet has grown from a quarter (25%) in 2013 to nearly four in ten (37%) in 2019.

The overall results obtained for this question allow to conclude that the likelihood to hear about EU financed projects on television did not decrease significantly, but television is today significantly less likely to be the first source of information on these matters – people are aware of them first through other sources.

Q1BT Where did you hear about it? First? And then?
(% - EU)



Base: respondents who have heard of EU co-financed projects (n= 10.788)

II. PRIORITIES FOR EU REGIONAL POLICY

1. Priority regions for EU regional investment

A majority of respondents agree that the EU should continue to invest in all its regions

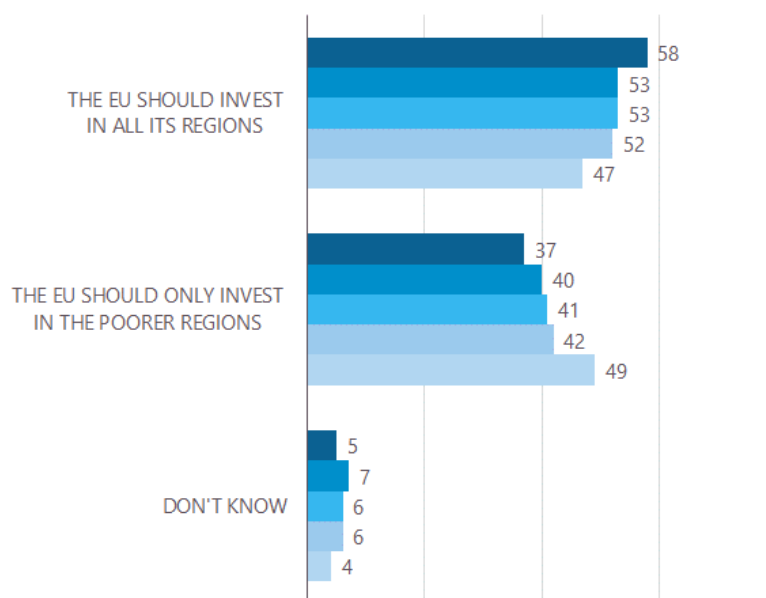
Respondents were first asked whether the EU should continue to invest in all its regions, or if it should concentrate its investment only on the poorest regions¹³.

Nearly six in ten respondents (58%) think that the **EU should invest in all its regions**, while fewer than four in ten (37%) say the **EU should only invest in poorer regions**. The proportion of respondents who believe the EU should continue to invest in all its regions has increased by five percentage points since March 2017, while the proportion who say it should only invest in poorer regions has fallen since March 2017 (-3 pp).

Q4a European regional policy supports economic development projects in all regions. In your opinion, should the EU continue to invest in all regions or concentrate exclusively on the poorer ones?

(% - EU)

■ June 2019 ■ March 2017 ■ June 2015 ■ Sept. 2013 ■ June 2010



Base: all respondents (n= 27.144)

¹³ Q4a European regional policy supports economic development projects in all regions. In your opinion, should the EU continue to invest in all regions or concentrate exclusively on the poorer ones

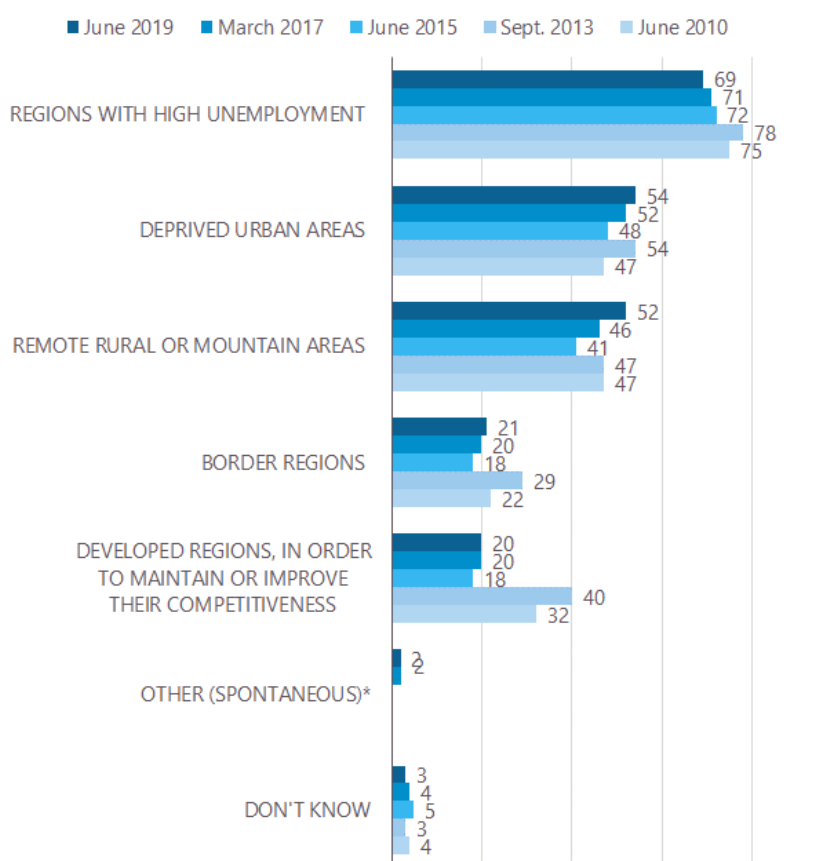
Seven in ten respondents would target for investment regions with high unemployment

Regardless of their answer to the first question, respondents were asked to identify the types of regions they would target for investment¹⁴. They were able to identify a maximum of three types.

Nearly seven in ten respondents identify **regions with high unemployment** (69%) as priority for investment, followed by **deprived urban areas** (54%) and **remote rural or mountain areas** (52%). **Border regions** or **developed regions** are considered of highest priority for investment by one in five respondents (21% and 20% respectively).

The proportion of respondents who would target regions with high unemployment has fallen by two percentage points since the last survey in March 2017, while the proportions opting for deprived urban areas and rural or mountain areas have increased by two percentage points and six percentage points respectively since 2017.

Q4b Which regions would you target for investments under EU regional policy?
(MAX. 3 ANSWERS)
(% - EU)



Base: all respondents (n= 27.144)

¹⁴ Q4b Which regions would you target for investments under EU regional policy? (MAX. 3 ANSWERS)

2. Most important areas for EU regional policy investment

Over nine in ten respondents want investments in education, health or social infrastructure

After identifying the types of regions the EU regional policy should prioritise, respondents were asked about the domains that should be targeted for investment. They were asked whether they think each of 11 domains are more or less important for their city or region¹⁵.

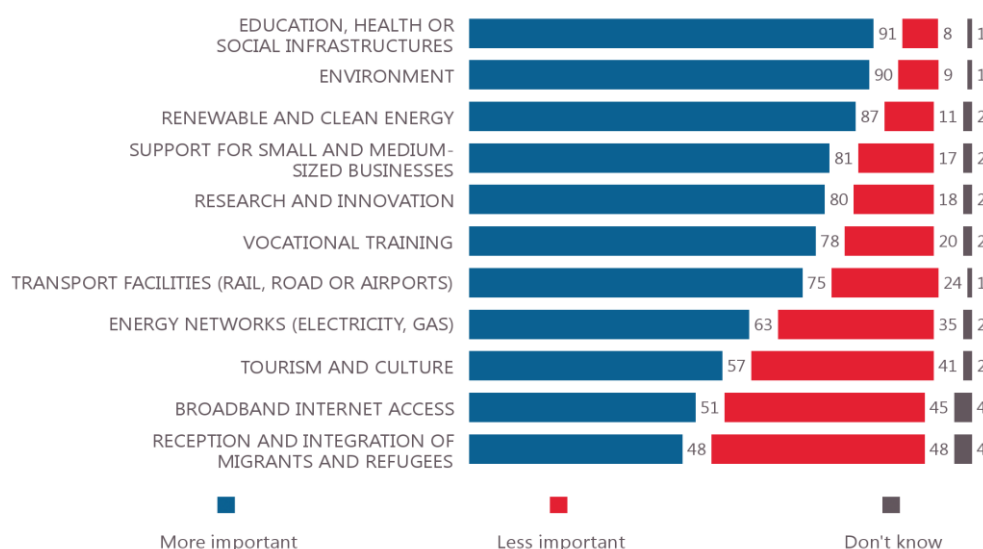
All but one of the domains are mentioned among the more important for their city or region by at least a relative majority of respondents.

More than nine in ten respondents (91%) consider **education, health or social infrastructures** one of the more important domains for investment for their city or region, followed by the **environment** (90%) and **renewable and clean energy** (87%). At least eight in ten respondents also mention **support for small and medium-sized businesses** (81%) and **research and innovation** (80%) among the more important domains for investment.

Smaller majorities mention the other investment domains. At least three quarters of respondents say investment in **vocational training** (78%) and **transport facilities** (75%) are the more important, while over six in ten identify **energy networks** (63%) and just under six in ten say **tourism and culture** (57%).

Finally, just over half the respondents say that **broadband Internet access** (51%) is one of the more important domains for investment for their city or region, while just under half say the same about investment in the **reception and integration of migrants and refugees** (48%).

Q5 EU regional policy can invest in many different domains. Which of the following examples do you consider more important or less important for your city or region? (% - EU)



Base: all respondents (n= 27.144)

¹⁵ Q5 EU regional policy can invest in many different domains. Which of the following examples do you consider more important or less important for your city or region? Research and innovation; Support for small and medium-sized businesses; Renewable and clean energy; Energy networks (electricity, gas); Broadband Internet access; Environment; Transport facilities (rail, road or airports); Vocational training; Education, health or social infrastructures; Tourism and culture; Reception and integration of migrants and refugees.

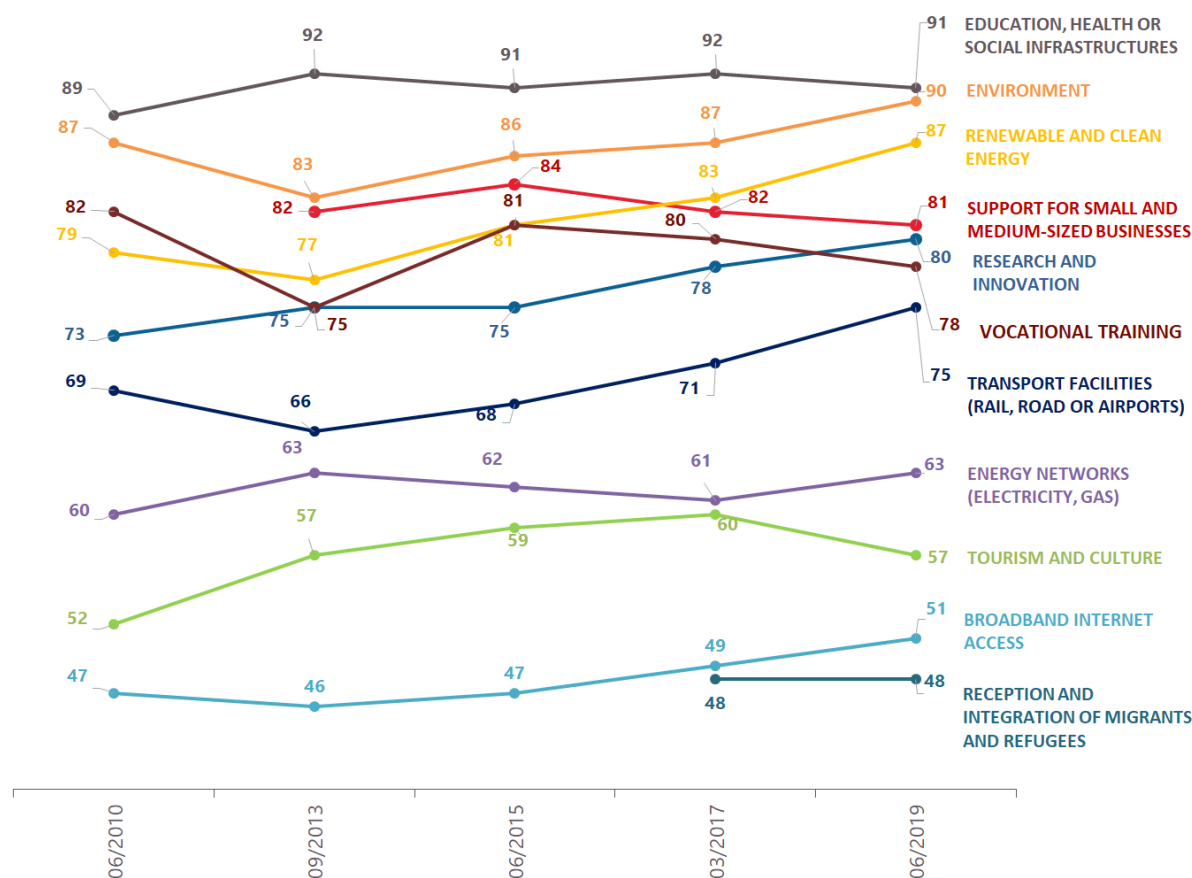
Since the first survey in June 2010, there have been a few significant changes in the domains respondents identify as more important for investment in their city or region.

While the proportions of respondents who identify the domains of **education, health or social infrastructures, support for small and medium-sized businesses, energy networks, tourism and culture** and **reception and integration of migrants and refugees** has remained stable, it has risen for the other domains.

The highest rise is in the proportion of respondents who mention EU investment in **renewable and clean energy** as the more important for their city or region (87%, +8 pp), closely followed by **research and development** (80%, +7 pp).

The proportion of respondents who consider as more important for their region investment in the **environment** has grown nearly as much (90%, +3 pp), while there have been 6 pp rises in the proportion of respondents who mention **transport facilities** (80%) and 4 pp in **broadband Internet access** (51%) is more important.

Q5 EU regional policy can invest in many different domains. Which of the following examples do you consider more important or less important for your city or region?
(% - EU - More important)



Base: all respondents (n= 27.144)

III. PRIMARY LEVEL OF GOVERNANCE

The majority of respondents still consider that decisions about EU-funded projects should be taken at regional or local level

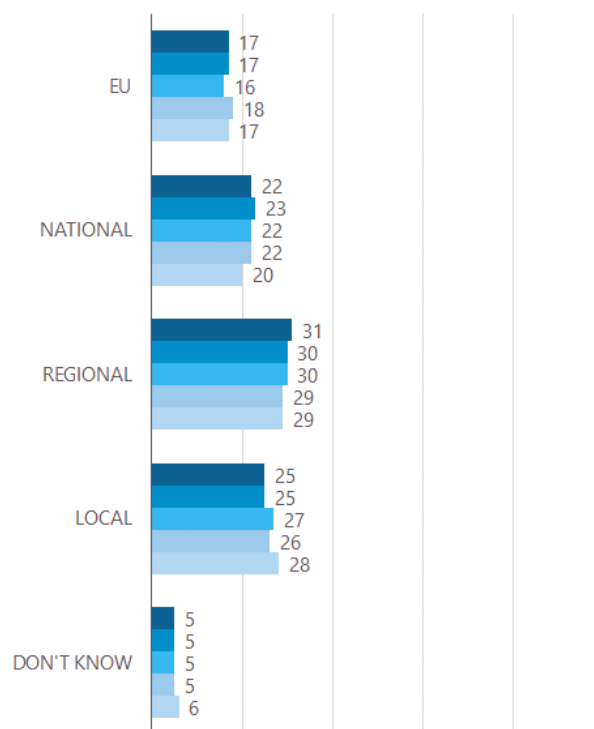
The third chapter of this report addresses the issue of governance. Respondents were asked to identify the level – EU, national, regional or local – at which decisions about EU regional policy projects should be made¹⁶.

As in the previous edition of the survey (2017), a majority of respondents (56%) think that decisions should be taken at sub-national levels, with almost a third (31%) opting for the regional level and a quarter (25%) opting for the local level. These are very close to shares observed in the surveys of 2017, 2015, 2013 and 2010.

Four in ten (39%) respondents think decisions should be taken at the national level or above, with over a fifth (22%) of respondents opting for the national level, and 17% suggesting the EU should make the decisions on projects funded by its regional policy.

Q6 At which level should decisions about EU regional policy projects primarily be taken?
(% - EU)

■ June 2019 ■ March 2017 ■ June 2015 ■ Sept. 2013 ■ June 2010



Base: all respondents (n= 27.144)

¹⁶ Q6 At which level should decisions about EU regional policy projects primarily be taken?

IV. CROSS-BORDER COOPERATION

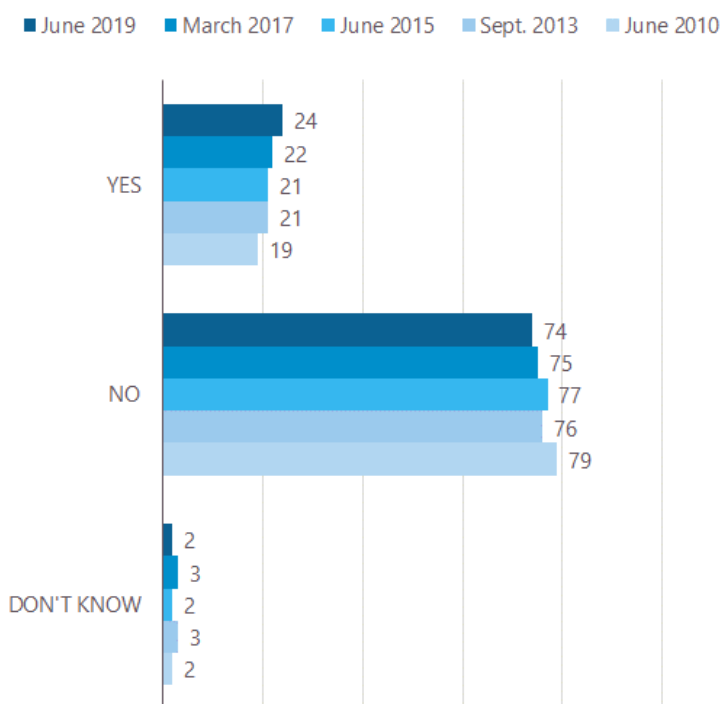
1. Awareness of and support for EU regional funding for cross-border cooperation

A quarter of respondents are aware that EU regional funding fosters cross-border cooperation

Respondents were asked if they are aware of cooperation between regions from different EU Member States because of EU regional funding¹⁷.

A quarter (24%) say that they are aware of this cooperation, while three-quarters (74%) are not. These figures are very similar to those recorded previously, although the proportion of respondents who are aware of such cooperation has steadily increased since June 2010.

Q7 Are you aware of cooperation between regions from different countries because of EU regional funding?
(% - EU)



Base: all respondents (n= 27.144)

¹⁷ Are you aware of cooperation between regions from different countries because of EU regional funding?

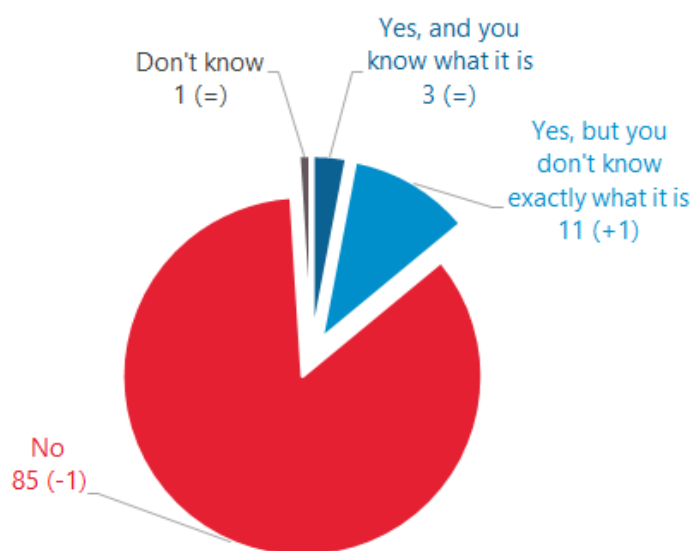
2. Awareness of EU strategies to promote cooperation

Just over one in ten respondents have heard of Interreg

Respondents were asked whether they have ever heard of Interreg¹⁸.

Overall, 14% of respondents have heard of **Interreg**, although only a very small share (3%) know what it is. More than eight in ten have never heard of it (85%)

Q8 Have you ever heard of Interreg? (% - EU)



(June 2019 - March 2017)

Base: all respondents (n= 27.144)

¹⁸ Q8 Have you ever heard of Interreg?

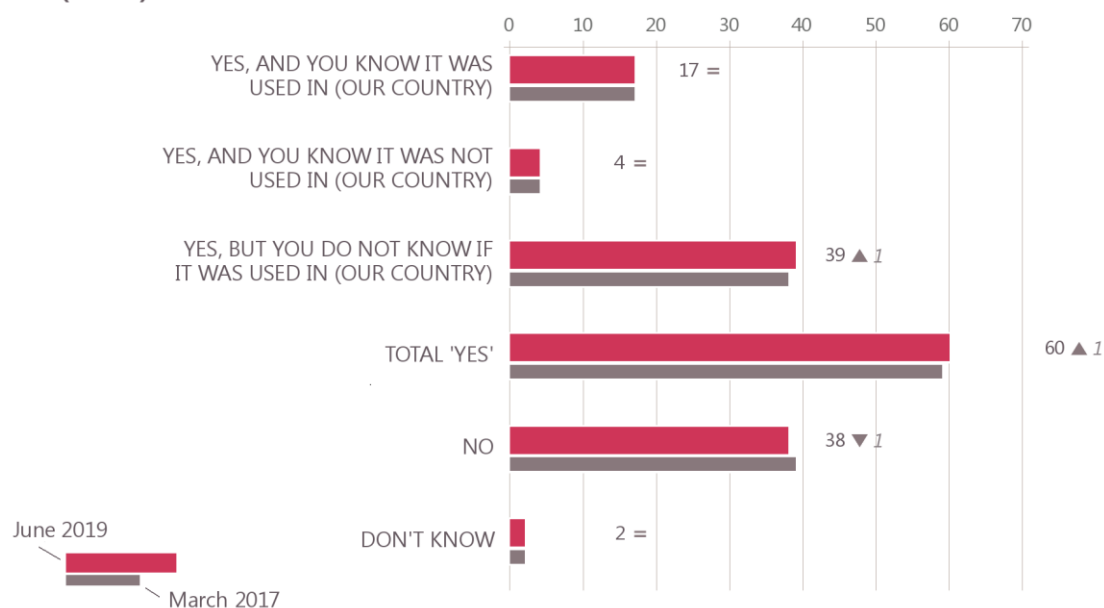
A majority of respondents know there is a European Solidarity Fund to respond to natural disasters

Respondents were asked whether they are aware that there is a European Solidarity Fund to respond to natural disasters¹⁹.

Overall, six in ten respondents (60%) say they are aware of it. In detail, just under four in ten (39%) know of the existence of the **European Solidarity Fund**, but do not know whether it has been used in their country or not; almost one in five (17%) know of its existence and that it has been used in their country, while 4% know of its existence and that it has not been used in their country.

Just under four in ten respondents (38%) are unaware that there is a European Solidarity Fund to respond to natural disasters. These results have remained virtually the same since the previous wave.

Q9 Are you aware that there is a European Solidarity Fund to respond to natural disasters?
(% - EU)



Base: all respondents (n= 27.144)

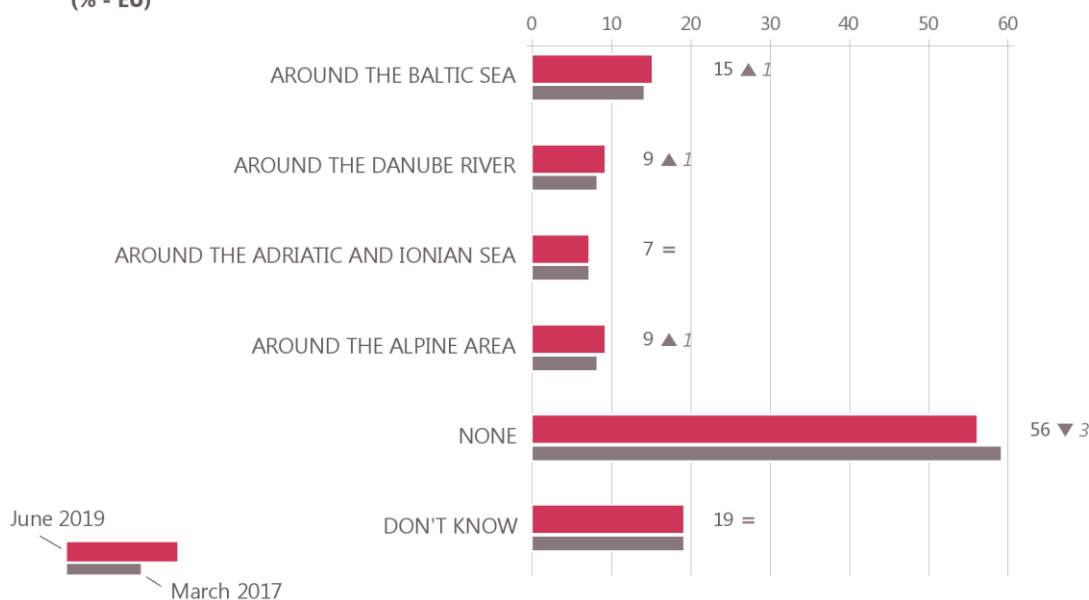
¹⁹ Q9 Are you aware that there is a European Solidarity Fund to respond to natural disasters?

Close to one in six respondents have heard of the EU strategy to promote cooperation between countries around the Baltic Sea

Respondents were then asked if they have heard of EU strategies to promote cooperation in a number of different areas²⁰.

Although a majority of respondents in EU countries are unaware that there is an EU strategy to promote cooperation in certain areas (56%), this proportion has fallen slightly since the last edition of the survey in 2017. 15% are aware there is such a strategy around the Baltic Sea, though less than a tenth have heard of any of the other strategies. Close to one in five (19%) respondents are unable to answer the question.

Q10 Are you aware that there is an EU strategy to promote cooperation between countries in the following areas? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



Base: all respondents (n= 27.144)

²⁰ Q10 Are you aware that there is an EU strategy to promote cooperation between countries in the following areas? (MULTIPLE ANSWERS POSSIBLE)

V. KNOWLEDGE OF EU OUTERMOST REGIONS

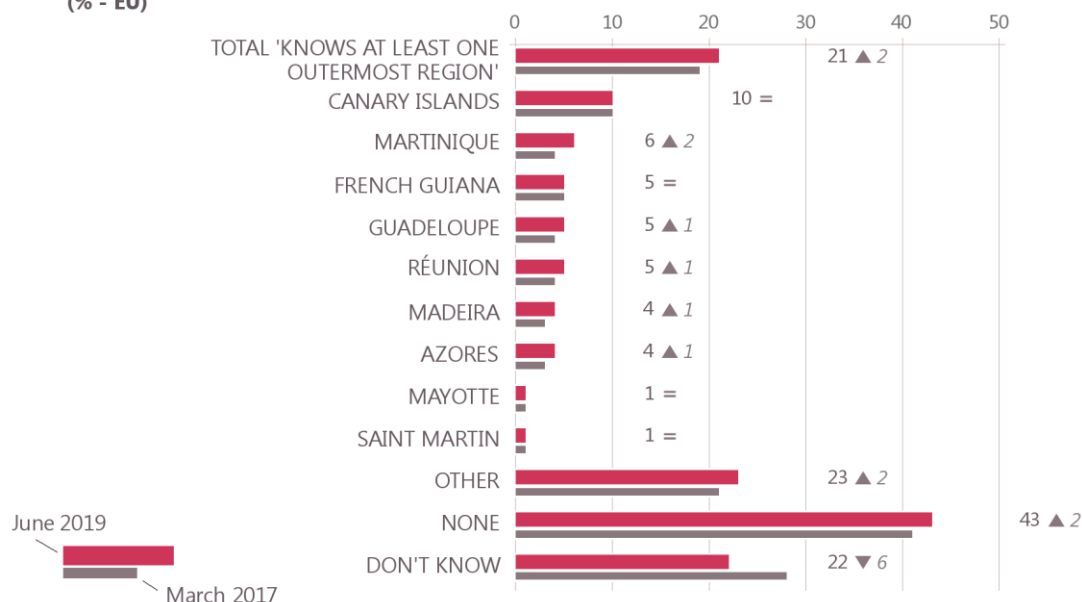
One in five respondents can name at least one EU outermost region

The final chapter of the report focuses on EU citizens' awareness of the nine EU outermost regions²¹.

Respondents were asked to name one or more of the nine EU outermost regions. Over four in ten of them are unable to name any of these regions (43%), but just over a fifth can identify at least one (21%), while 23% mistakenly name other areas and 22% "don't know".

The only region mentioned by as many as one in ten respondents is the Canary Islands (10%). These proportions have remained largely stable since the last wave.

Q11 There are 9 EU outermost regions which are territories or islands located far away from the European continent. Can you name one or more of them? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)



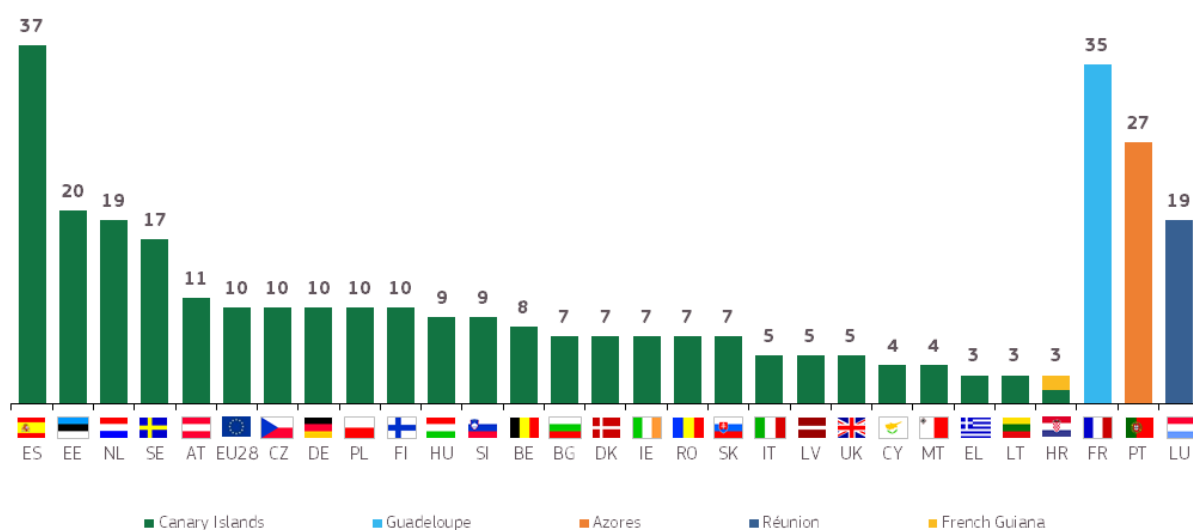
Base: all respondents (n= 27.144)

²¹ Q11 There are 9 outermost regions which are territories or islands located far away from the European continent. Can you name one or more of them?

At national level, in all but three countries, the most common answer given by respondents who could name one of the outermost regions was Canary Islands, unsurprisingly led by Spain (37%) and followed by Estonia (20%) and the Netherlands (19%).

Guadeloupe is the most-given response in France (35%), while in Portugal it is the Azores (27%) and in Luxembourg it is Réunion (19%). Respondents in Croatia also cited French Guiana alongside the Canary Islands as their common answer (both 3%).

Q11 There are 9 EU outermost regions which are territories or islands located far away from the European continent. Can you name one or more of them? (DO NOT READ OUT - MULTIPLE ANSWERS POSSIBLE)
(% - THE MOST MENTIONED ANSWER BY COUNTRY)



Base: all respondents (n= 27.144)