



BURSON-MARSTELLER – BRUSSELS MEDIA CONSUMPTION SURVEY

JUNE 2018



Burson•Marsteller



METHODOLOGY

ComRes interviewed 230 EU influencers (made up of 76 MEPs, 43 EU institution staff and 111 Brussels opinion formers) online between 13th March and 25th May 2018. Data is then weighted to be representative of EU influencers by organisation type and MEPs by party and region. Details for all waves of research are provided below.

2018 <i>13th March – 25th May</i>			2017 <i>24th February – 19th June</i>			2016 <i>27th October 2015 – 18th January</i>		
230 EU influencers			230 EU influencers			249 EU influencers		
76 MEPs	111 Brussels opinion formers	43 EU institution staff	76 MEPs	90 Brussels opinion formers	64 EU institution staff	77 MEPs	86 Brussels opinion formers	86 EU institution staff

Please note that some question wordings have changed for 2018. Where this is the case, this has been flagged by an asterisk next to question wording.

ComRes is a member of the British Polling Council and abides by its rules (www.britishpollingcouncil.org). This commits us to the highest standards of transparency.

The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:

- The company conducting the research (ComRes)
- The client commissioning the survey
- Dates of interviewing
- Method of obtaining the interviews (e.g. in-person, post, telephone, internet)
- The universe effectively represented (all adults, voters etc.)
- The percentages upon which conclusions are based
- Size of the sample and geographic coverage.

Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.

All press releases or other publications must be checked with ComRes before use. ComRes requires 48 hours to check a press release unless otherwise agreed.

FINDINGS

POLITICO and the Financial Times are the most influential media sources for EU news and informing decision making.

*Q. In your professional role, how influential are the following media in terms of EU news and providing you with what you need to make informed decisions?**

Showing NET: influential for top ten sources	Total	MEPs	EU Institution staff	Opinion formers
POLITICO	69%	59%	72%	75%
Financial Times	62%	54%	72%	61%
BBC	59%	55%	72%	50%
The Economist	57%	50%	63%	59%
Twitter	55%	53%	56%	57%
EurActiv	52%	46%	56%	54%
Euronews	48%	48%	63%	32%
EUobserver	44%	33%	65%	34%
Wall Street Journal	38%	36%	47%	31%
Facebook	32%	44%	28%	23%

*Base: 2018 all EU Influencers (n=230) *Please note that the question wording has changed from 2017 to measure informing decision making rather than influencing day-to-day work.*

- POLITICO and the Financial Times are the most influential media sources for EU news and informing decision making, with over three in five citing them as ‘very’ or ‘fairly’ influential (69% and 62% respectively). The BBC (59%), the Economist (57%), Twitter (55%) and Euractiv (52%) also proved influential, with over half of EU influencers reporting each source in this regard.
 - Notably, this is consistent with research conducted last year, which found that the same six sources were the most influential of all the sources tested in the day-to-day work of EU Influencers.
 - However, the proportion of EU influencers saying that these sources are influential in terms of EU news and informing decision making is considerably higher this year than the

proportion of EU influencers who said that they were influential in their day to day work last year. This suggests that either, these sources are gaining in influence amongst EU influencers, or that they are more influential in informing decision making than in these audiences' day-to-day work.

- There are considerable differences in the perceived levels of influence amongst audience types.
 - For example, Brussels opinion formers are significantly less likely than the other influencer groups to say that Euronews is influential in informing decision-making, with around a third (32%) reporting this compared to close to half of MEPs (48%) and close to two thirds of EU Institution staff (63%).
 - Meanwhile, EU Institution staff are significantly more likely than MEPs or Brussels opinion formers to say that the EU Observer is influential in EU news and providing information in decision-making (65% vs. 33% vs. 34%).
 - Notably, MEPs are significantly more likely than other EU audiences to say that Facebook is influential; over two in five (44%) cite this as influential compared to three in ten EU Institution Staff (28%) and a quarter of Brussel's opinion formers (23%).

Of all the social media channels and mobile applications tested, WhatsApp is used the most on a daily basis by EU influencers, followed by Twitter.

*Q. In your professional role, how frequently, if at all, do you use the following social media channels or mobile applications?**

	Hourly	Daily	A few times a week	Once a week	A few times a month	Once a month	Less than once a month	Never	2018 NET: At least daily	2017 NET: At least daily	2016 NET: At least daily
WhatsApp	17%	39%	11%	2%	4%	2%	3%	18%	56%	N/A	N/A
Twitter	15%	32%	17%	8%	4%	2%	3%	17%	46%	39%	35%
Facebook	10%	29%	15%	6%	6%	2%	3%	25%	39%	44%	52%
YouTube	2%	17%	18%	13%	14%	7%	10%	15%	18%	21%	20%
LinkedIn	2%	16%	13%	13%	10%	4%	9%	30%	18%	12%	13%
Instagram	1%	8%	6%	4%	5%	4%	10%	57%	9%	4%	7%

Base: 2018 all EU influencers (n=230); 2017 all EU Influencers (n=230); 2016 all EU influencers (n=249). N/A denotes that this channel or application was not tested in that year.

**Please note that question wording has been amended slightly for 2018 to include mobile applications*

- WhatsApp is used at least once a day by over half (56%) of EU influencers, which represents a higher proportion than all other social media channels and mobile applications tested. Twitter (46%) and Facebook (39%) are also used at least daily by EU influencers, whilst YouTube (18%), LinkedIn (18%) and Instagram (9%) are the least likely to be used as frequently by these groups.
 - Notably, tracking data reveals that EU influencers use of Twitter has become more frequent over the last three years, with only a third (35%) using it at least daily in 2016 compared to close to half (46%) in 2018. LinkedIn and Instagram have also seen a slight increase in the frequency of use amongst EU influencers since 2017 (LinkedIn: 12% vs. 18%; Instagram 4% vs. 9%).
 - Conversely, the frequency of using Facebook amongst EU influencers has dropped considerably over the last three years, from over half (52%) using it at least daily in 2016, to two in five (39%) in 2018.

- For the majority of the social media channels and mobile applications tested, there is a considerable difference in the frequency of engagement amongst influencer audiences.
 - The starkest difference in this regard is the frequency of using Facebook. Two thirds (66%) of MEPs say that they use this social media at least daily, compared to only 28% of Brussels opinion formers and 23% of EU Institution Staff.
 - Further, Brussels opinion formers are considerably less likely to use WhatsApp than other EU influencers (41% vs. 63% for both EU Institution staff and MEPs)
 - Conversely, MEPs use Instagram at a greater frequency than other EU influencer audiences, with one in five (19%) using it at least daily, compared to only 5% of EU Institution staff and 3% of Brussels opinion formers.

EU influencers are generally more likely to be influenced by personal interactions; with personal contacts and professional colleagues the most influential of all of the sources tested in informing decision making.

Q. In general, in your professional role, how influential are each of the following in providing you with what you need to make informed decisions?

	Very influential	Fairly influential	Not very influential	Not at all influential	NET: Influential	NET: Not influential
Personal contacts	60%	33%	5%	0%	93%	5%
Professional colleagues	50%	42%	4%	0%	93%	5%
Information provided by EU institutions / member states	46%	40%	10%	1%	86%	11%
Meeting with stakeholders	48%	37%	11%	1%	86%	11%
Traditional media	21%	56%	16%	3%	77%	20%
Conferences / events	20%	57%	19%	2%	76%	21%
Social media	16%	32%	35%	12%	48%	47%
Video / infographics	12%	35%	34%	14%	47%	48%

Base: 2018 all EU influencers (n=230)

- Personal contacts (93%) and professional colleagues (93%) are most commonly cited as influential in making informed decisions, suggesting that personal interaction has a strong role in decision-making amongst EU influencers.
- Many of the information sources tested proved to be influential in informing decisions amongst EU influencers, with over three-quarters reporting stakeholder meetings (86%), information provided by EU institutions or member states (86%), traditional media (77%), and conferences or events (76%) as influential.
 - Largely, there is little difference amongst EU influencer audiences in this regard; although MEPs are significantly less likely to say that meetings with stakeholders are influential (75%) compared to EU Institution staff (91%) and Brussels opinion formers (91%).
- However, social media (48%) and video or infographics (47%) are considerably less likely to be considered influential than the other sources tested. EU influencers are generally divided on the extent to which they influence informed decision-making, with similar proportions saying that they are, and are not, influential. (Social media: 48% vs 47%; Video or infographics: 47% vs. 48%)

THANK YOU

FOR MORE INFORMATION:

Meghan Oliver

Associate Director

meghan.oliver@comresglobal.com

+44 (0)207 871 8645

Holly Captainino

Consultant

holly.captainino@comresglobal.com

+44 (0)207 871 8650





WWW.COMRESGLOBAL.COM

LONDON

Four Millbank
London
SW1P 3JA

T: +44 (0)20 7871 8660

F: +44 (0)20 7799 2391

E: info@comresglobal.com

BRUSSELS

Rond Point Schuman 6
Box5, 1040
Bruxelles

T: +32 (0)2 234 63 82

F: +32 (0)2 234 79 11

E: info@comres.eu.com

SHANGHAI

51/F Raffles City
No.268 Xi Zang Middle Rd
HuangPu District Shanghai
200001 China

T: +86 (0)21 2312 7674

E: info@comresglobal.com