

International image of Catalonia

EXECUTIVE SUMMARY / DECEMBER 2019



Fira Barcelona

Data sheet for Diplocat survey September/October 2019

- **SURVEY COMPANY**

SSI (DYNATA)

- **METHODOLOGY**

Self-managed Internet Panel Online questionnaire. Combination of open and closed questions.

- **UNIVERSE**

European population over 18 years old with interest in and knowledge of international affairs.
France, Italy, Germany, UK, Sweden, Switzerland, Estonia, Latvia and Slovenia.

- **SAMPLE**

2,561 respondents

- **FIELD WORK**

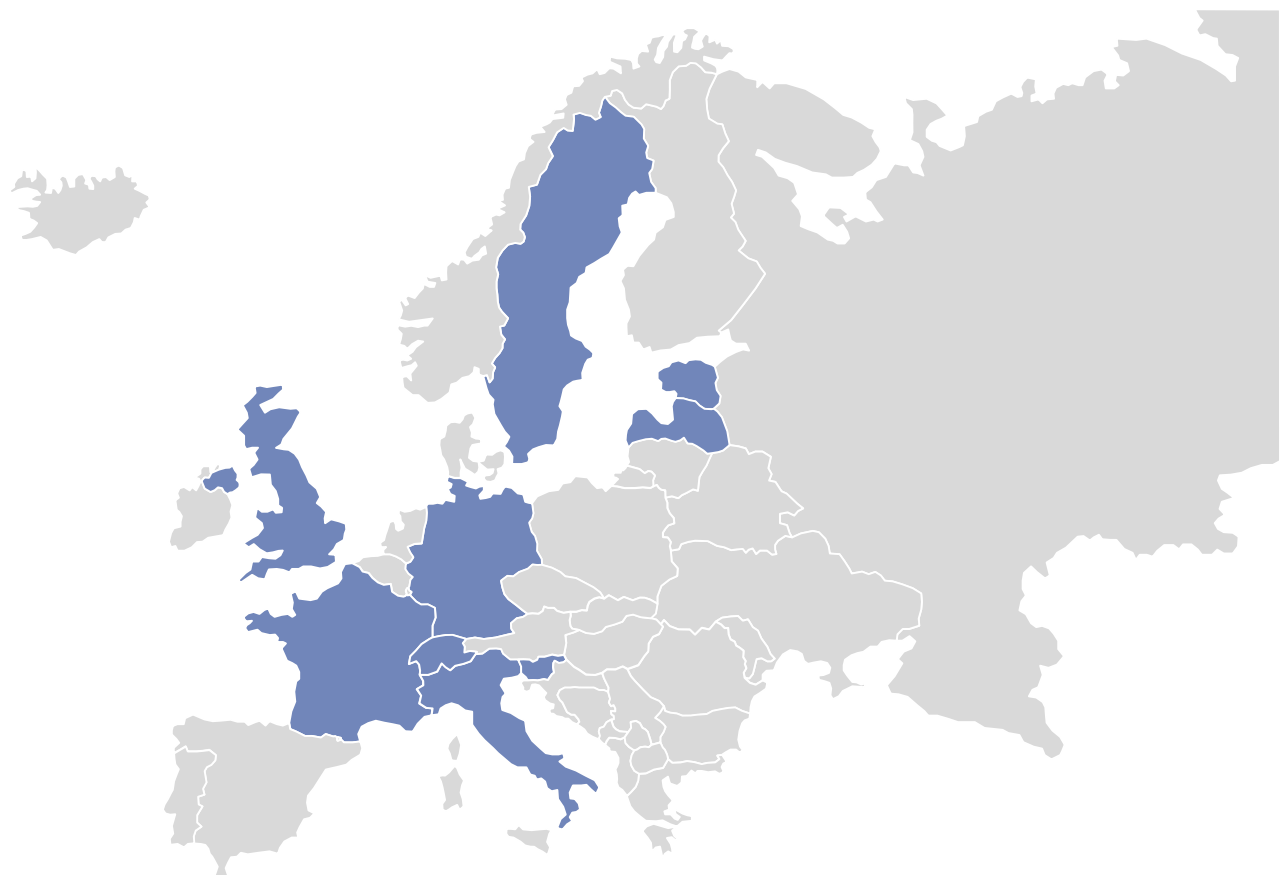
23 September- 2 October 2019

- **MARGIN OF ERROR**

Margin of error of +/- 1.94% with a confidence interval of 95%.

- **COMPANY ANALYSING OPEN QUESTIONS AND COMPARING WITH AVAILABLE DATA**

RELEVANCE



Innovative methodology that lets opinions be heard and compared with reality

Listening through open-ended questions.
Spontaneous answers collected and analysed by building semantic dictionaries.

Opinions compared with objective realities and available demoscopic data to build a complete picture of the perception of Catalonia in Europe.

Project and sources of information

The main sources of information are available public studies and the survey carried out by Diplocat in September/October 2019 with open questions.

LISTENING



Open-ended questions
Spontaneous answers

COMPARING

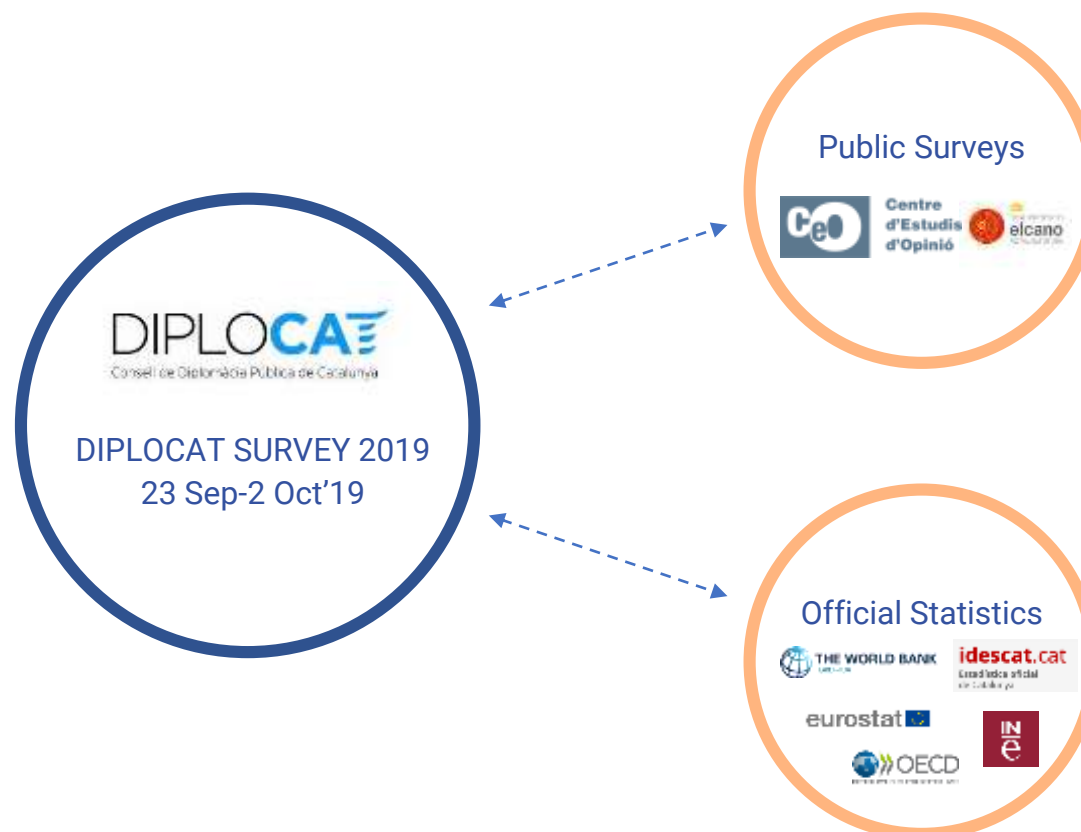


Public surveys
Official statistics

Results of the Diplocat survey compared with other data

Diplocat survey compared with other public surveys (CEO, Elcano) and official statistics (World Bank, OECD, Eurostat, INE, Idescat).

Diplocat survey information compared with public sources and information (official surveys and statistics).
The main sources of information are available public studies and the Diplocat survey carried out in September-October 2019



Comparing:

- How does the information obtained in the Diplocat survey compare with previously published information from surveys that have been made public?
- Extrapolation of data in countries where no Diplocat survey has been carried out.

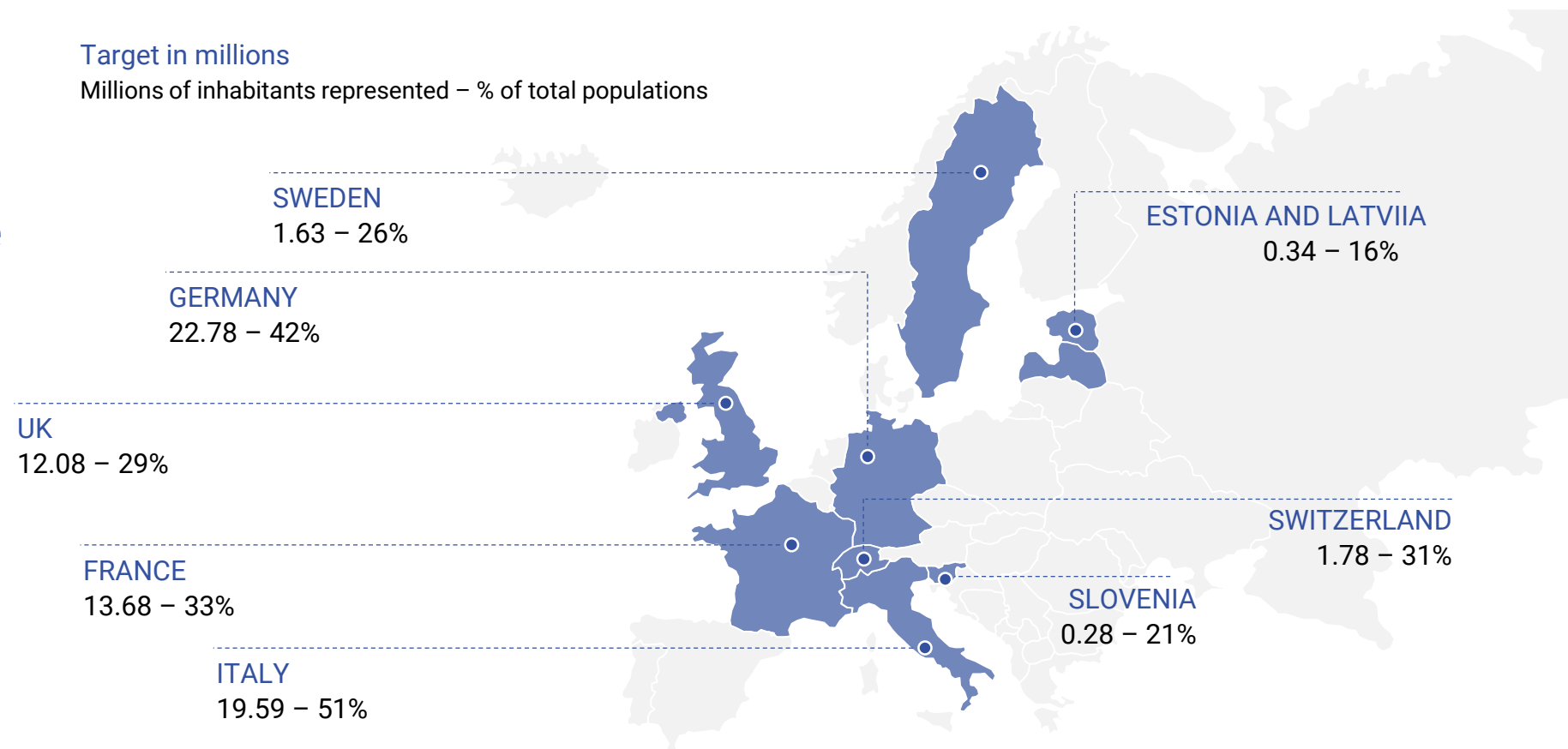
Comparing:

- How does the perception of Catalonia by European public opinion compare with objective data on the country?
- In what aspects is Catalonia overrated compared to reality and in what aspects is it underrated?

Universe studied: informed European public opinion

The survey represents 72.15 million Europeans. 38% of the population in the countries analysed are well-informed as they are familiar with international current affairs.

Target in millions
Millions of inhabitants represented – % of total populations

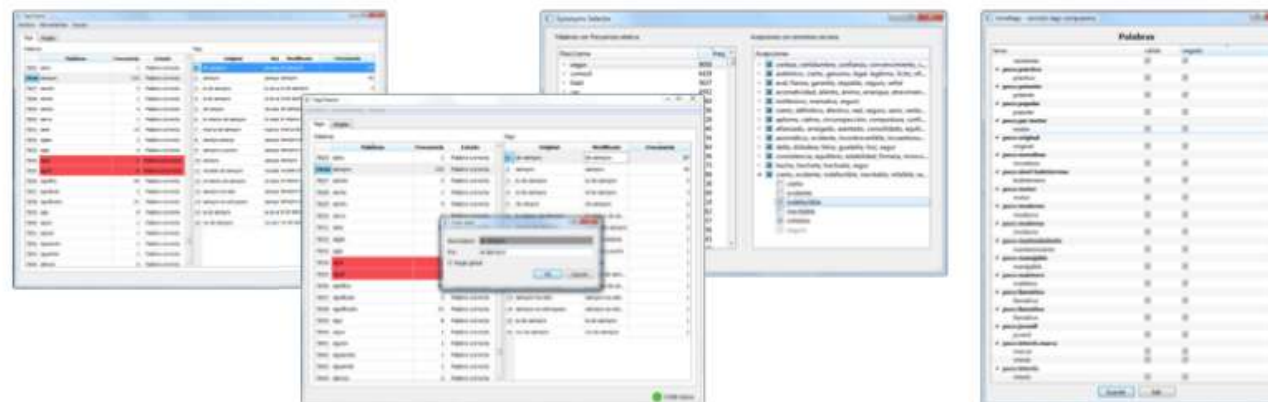


Screening questions:

- From 0 to 10, what is your level of interest in the following matters?
- What is your level of knowledge of these current affairs?
- What phrase or phrases best describe your relationship with these countries and regions of Europe?

Open-ended question analysis methodology: TAGs®

To analyse the open-ended questions included in the Diplocat survey Sep/Oct'19, we have used TAGs® methodology, consisting of cleaning and grouping words in concepts, thus creating semantic dictionaries.

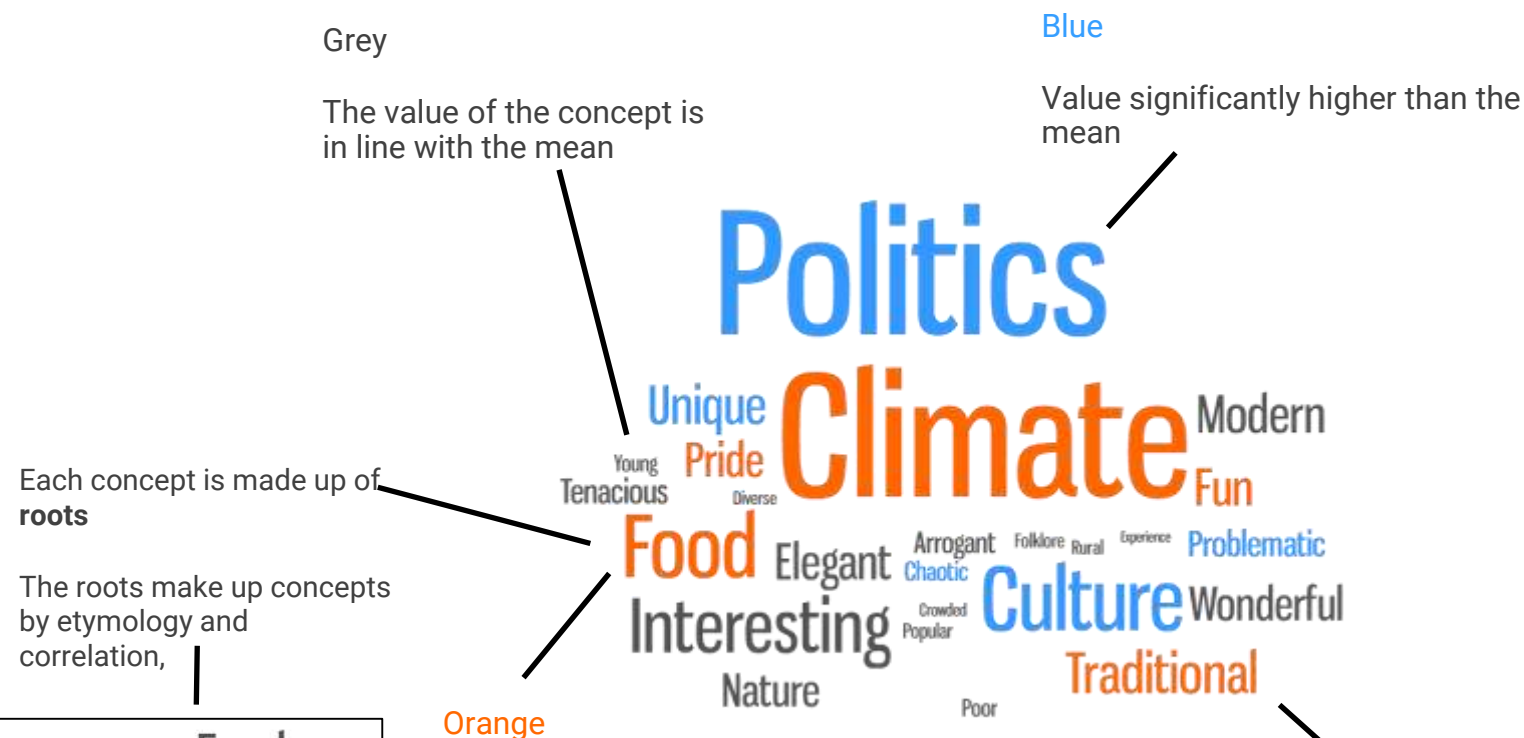
CLEANING**GROUPING****CONSISTENCY****DICTIONARY**

Concept	ABS	%
healthy	459	46,04%
healthy	430	43,13%
good_for_y	26	2,61%
wholesome	3	0,30%
nutritious	138	13,84%
vitamin	71	7,12%
nutrient	52	5,22%
fiber	11	1,10%

459 roots -> 38 concepts

TAGs® methodology: how to read a tag cloud

Tags® allow qualitative studies to be carried out with a quantitative base (large samples) and open-ended questions.



Question: "In my opinion, this country / region is ..."



01

IMAGE AND RATING OF CATALONIA

Catalonia, highly rated among Europeans

Catalonia obtains a very similar rating to Spain.

Germans rate Catalonia above Spain and Britons and Italians below it.

*: Rating of Catalonia when it is known.

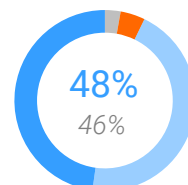
***: Rating of Spain when it is known

General rating of Catalonia (respondents with knowledge of Catalonia)

Mean

7.3*

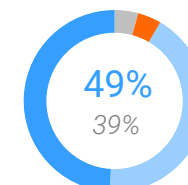
Spain: 7.3**



Germany

7.4

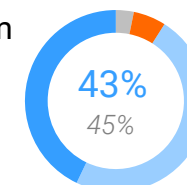
Spain: 7.0



United Kingdom

6.7

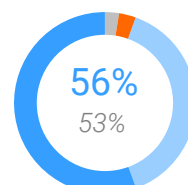
Spain: 7.2



France

7.5

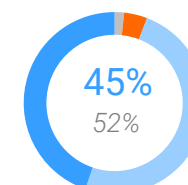
Spain: 7.5



Italy

7.0

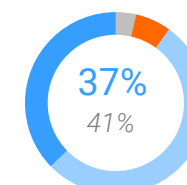
Spain: 7.5



Sweden

6.5

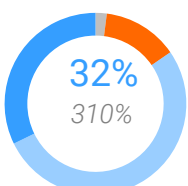
Spain: 6.9



Switzerland

6.2

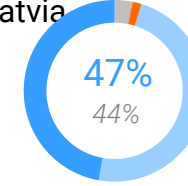
Spain: 6.4



Estonia / Latvia

7.4

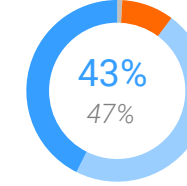
Spain: 7.3



Slovenia

6.7

Spain: 7.0



● 8-10 ● 5-7 ● 0-4 ● DK/NA Catalonia Spain

Question: How do you rate each of these countries and regions in general (quality of life, economy, safety, democracy...)?

Catalonia is associated with politics and a good climate

Politics, climate and attractive are the most frequently mentioned concepts for Catalonia.

Other concepts that appear are friendly, culture and food.

General rating and image of Catalonia



Concept	Frequency
Politics	23.2%
Climate	23%
Attractive	22.9%
Friendly	13.7%
Culture	11.1%
Food	10.9%
Interesting	9.3%
Tourist	8.4%
Rich	6.9%
Traditional	6.7%



Question: Following the previous example, what do you spontaneously think of or associate with the different European countries and regions? What words/adjectives do you associate to each of them? "In my opinion, this country and region is..."

General image of Catalonia: words used



Question: Following the previous example, what do you spontaneously think of or associate with the different European countries and regions? What words/adjectives do you associate to each of them? "In my opinion, this country and region is..."

N: 2.561

11

Catalonia's image according to different countries

The concepts of climate, friendly and culture are those which vary most depending on the country.

General rating of Catalonia



Question: Following the previous example, what do you spontaneously think of or associate with the different European countries and regions? What words/adjectives do you associate to each of them? "In my opinion, this country and region is..."

N: 2561

02

TOURISM

Catalonia very highly rated as a tourist destination

There is a high level of satisfaction, as the score given to Catalonia as a tourist destination by those who know it is 7.8.

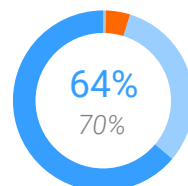
Estonia and Latvia with a score of 8.7 are the countries that rate it the highest. On the other hand, Swedes and Swiss with 7.3 and 7.5 respectively give the lowest score.

Rating of Catalonia as a tourist destination when respondents know it

Mean

7.8

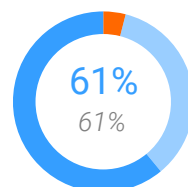
Spain: 8.1 (Index: 96)



France

7.7

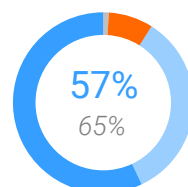
Spain: 7.7 (100)



Switzerland

7.5

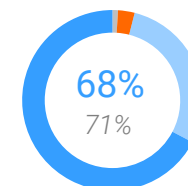
Spain: 8 (94)



Germany

8.0

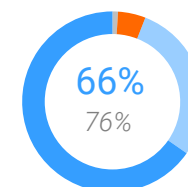
Spain: 8.2 (98)



Italy

7.9

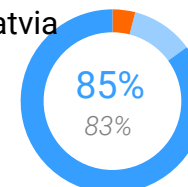
Spain: 8.3 (95)



Estonia / Latvia

8.7

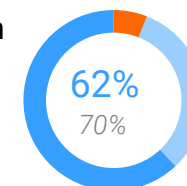
Spain: 8.7 (100)



United Kingdom

7.7

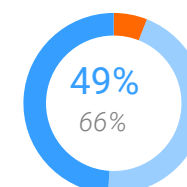
Spain: 8 (96)



Sweden

7.3

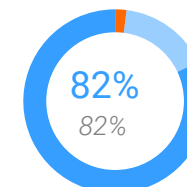
Spain: 8 (91)



Slovenia

8.5

Spain: 8.8 (97)



8-10

5-7

0-4

DK/NA

Catalonia

Spain

Question: How do you rate Catalonia and Spain as a tourist destination?

N: 2.561

14

Tourist image of Catalonia: attractive, good climate and interesting

Attractive, climate and interesting are the most frequently mentioned concepts for Catalonia.

Other concepts are friendly, culture and wonderful.

Tourist rating of Catalonia



Concept	Frequency
Attractive	29.5%
Climate	24.1%
Interesting	21.7%
Friendly	15.9%
Culture	12.3%
Wonderful	12.2%
Food	8.1%
Unique	8%
Peace and quiet	7.4%
Modern	6.9%



Question: As you have done above, how would you spontaneously define the different European countries and regions as tourist destinations? What words/adjectives would you use to describe each of the tourist destinations?

"In my opinion, as a tourist destination this country or region is ..."

Differences in the tourist image of Catalonia by country

There are different tourist images of Catalonia depending on the country.

Image of Catalonia as a tourist destination



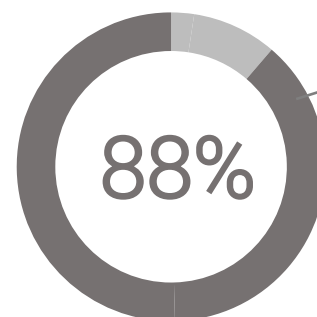
Question: Following the previous example, what do you spontaneously think of or associate with the different European countries and regions?
 What words/adjectives do you associate to each of them? "In my opinion, this country and region is..."

Good climate and history, tourist attractions of Catalonia

The three main attractions are the beach and the climate, history and culture, and Catalonia's unique character.

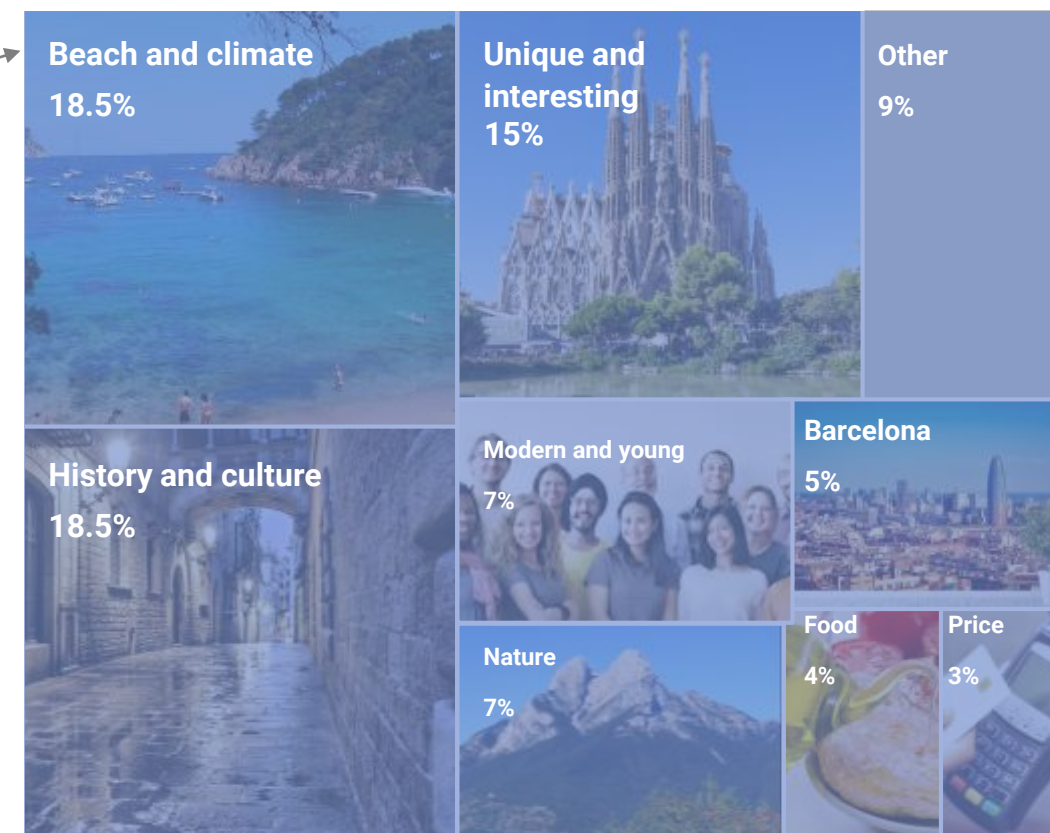
Other favourably rated assets are the young, modern and multicultural spirit, Nature, the city of Barcelona, food and affordability.

Positive rating of Catalonia as a tourist destination (5 – 10)



Catalonia is a very attractive destination for the European population.
88% pass Catalonia as a tourist destination.

Main reason for visiting Catalonia (over 88%):



Question: For what reasons do you consider Catalonia to be a good tourist destination?

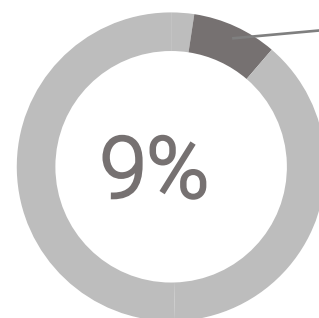
N: 1972

Reasons for rating Catalonia negatively as a tourist destination

Only 9% would not consider Catalonia as a tourist destination (7% of those who know it).

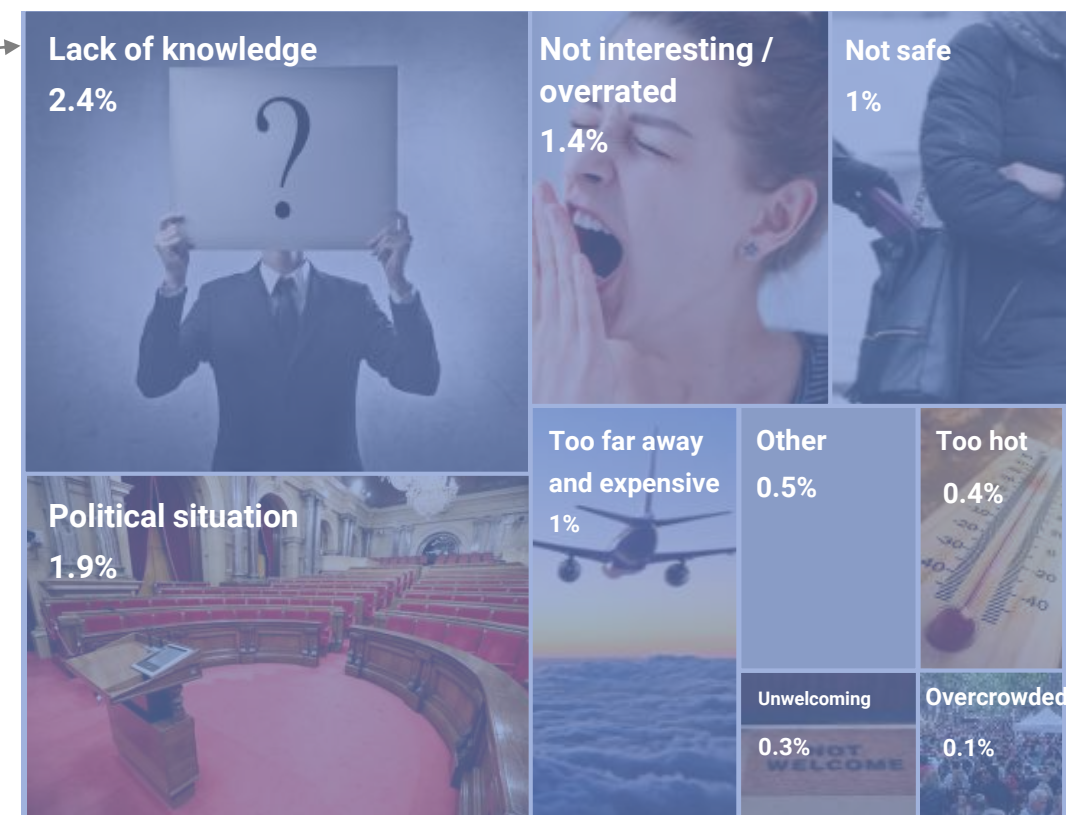
Lack of knowledge is the main reason for not considering Catalonia as a tourist destination, followed by the political situation, lack of interest, safety concerns or distance / price.

Negative rating of Catalonia as a tourist destination (0 – 4)



Less than 10% of Europeans rate Catalonia negatively as a tourist destination.

Main reason for not visiting Catalonia (over 9%):



Question: For what reasons do you NOT consider Catalonia to be a good tourist destination?

N: 198

03

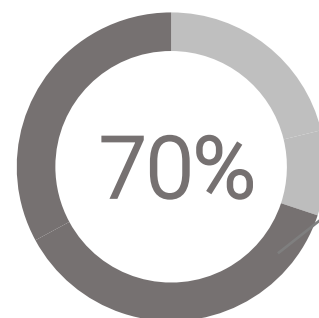
ECONOMY AND SOCIETY

70% see Catalonia as a good place to do business

70% rate Catalonia positively for doing business and rate its culture/people, good economic situation and geographical location.

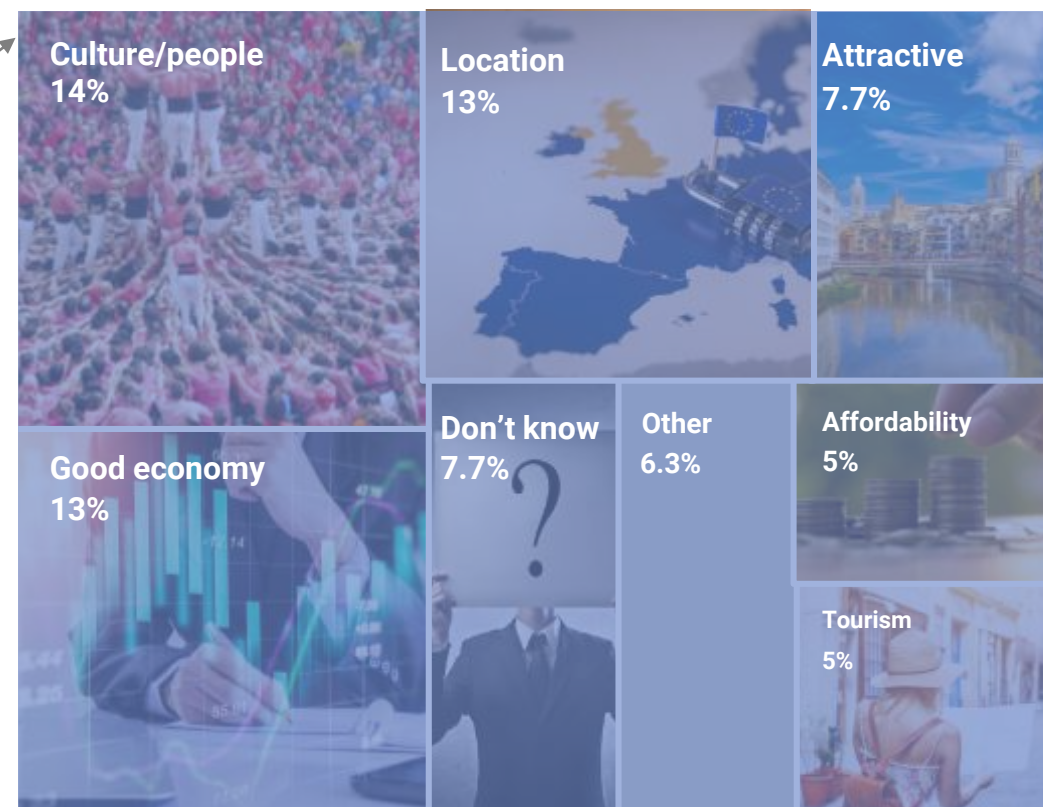
In culture/people, a good welcome and food stand out. Being a member of the EU and good connections as far as location is concerned and wealth and development head the reasons for considering that Catalonia is interesting from the economic standpoint.

Positive rating of Catalonia as a place to do business (5 – 10)



70% see Catalonia as an interesting region for doing business.

Main reason for working or doing business (over 70%)

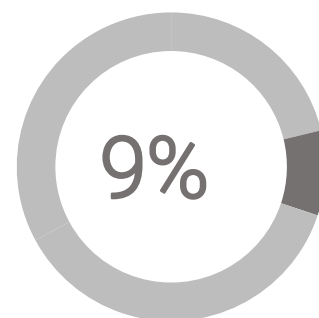


9% think Catalonia is not a good place to do business

9% consider that Catalonia is not a good place to do business and mention the political situation, poverty, poor language skills and bureaucracy as the main drawbacks.

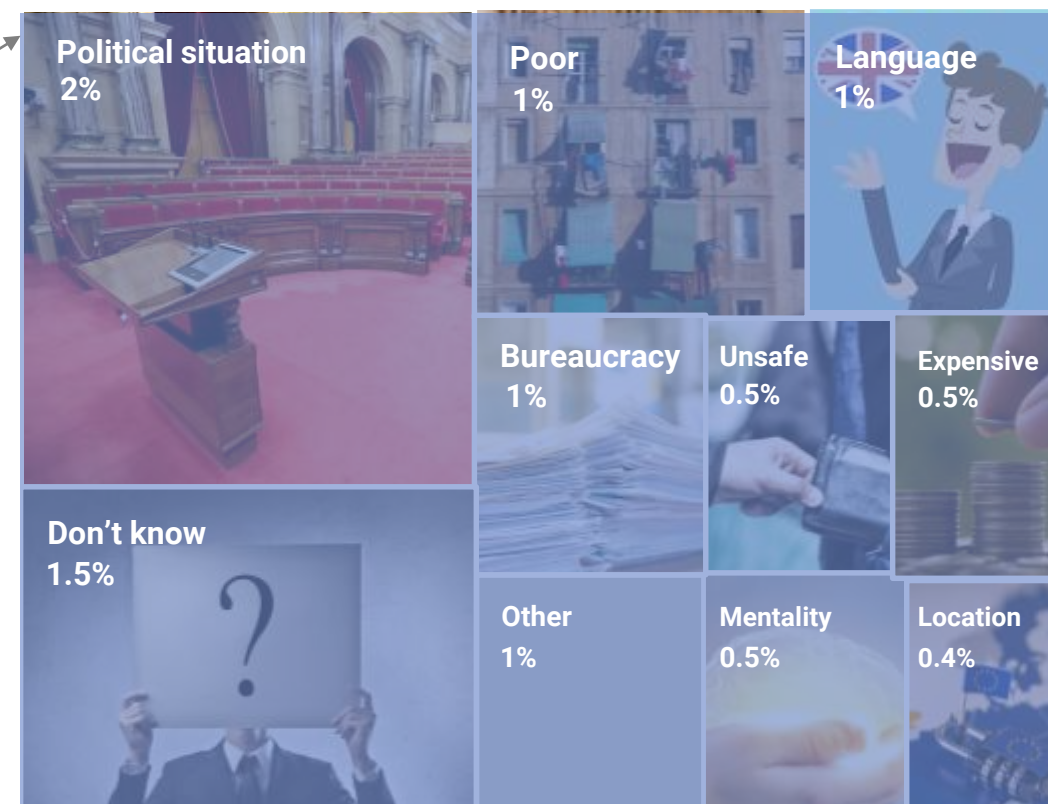
Those who consider Catalonia to be a poor region do so on the basis of its economy and the lack of infrastructures and development. Insufficient mastery of English and a complex bureaucratic system also have a negative influence.

Negative rating of Catalonia as a place to do business (0-4)



Less than 10% of Europeans consider Catalonia negatively as a place to do business.

Main reason for not working or doing business in Catalonia (over 9%)



Question: For what reasons do you NOT consider that Catalonia is a good place to do business?

N:238

21

The factors rated highest are culture and sport

The most highly rated socio-economic aspect of Catalonia is culture, followed by sport.

There are important differences in the perception of socio-economic aspects depending on the country. Italy is the country that rates all socio-economic aspects the highest, while Sweden is the country that gives them the lowest rating.

Rating of socio-economic aspects



Research and technological innovation



Entrepreneurship and start-ups



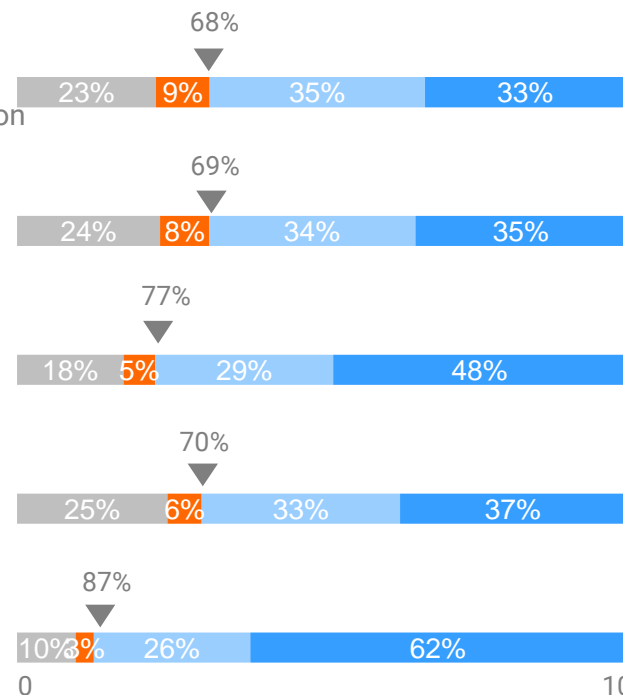
Org. of events and level of sportspeople



Quality of the education system

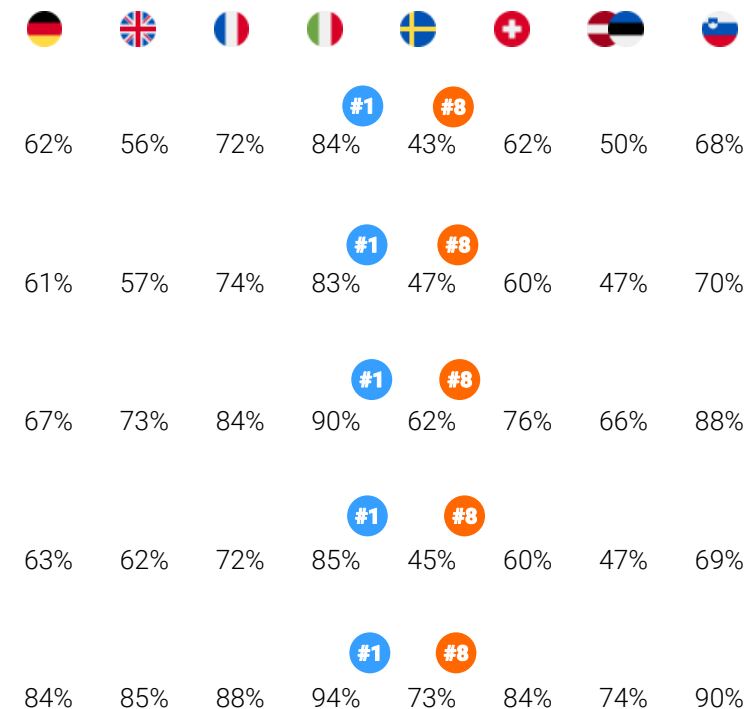


Culture and cultural production



8-10 5-7 0-4 NS/NC

% Positive rating (5-10)



04

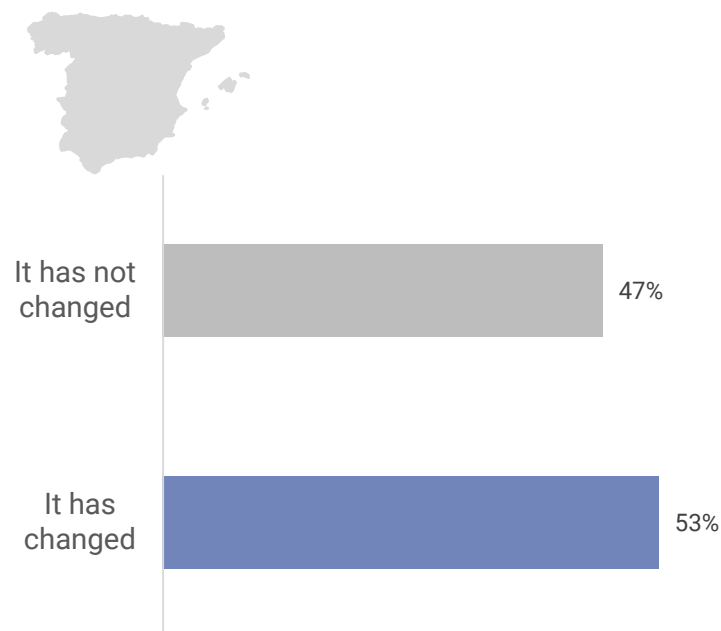
POLITICS

The events in Catalonia have changed people's opinion

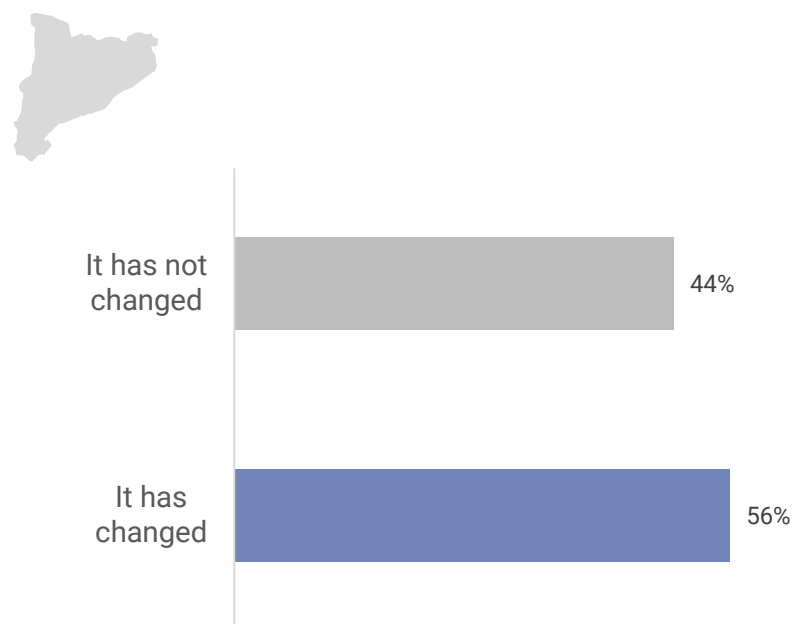
The image of Catalonia has changed more than the image of Spain, but for both Spain and Catalonia events have caused the opinion to change.

Impact on rating among those who know the facts

How the image of Spain has been affected



How the image of Catalonia has been affected



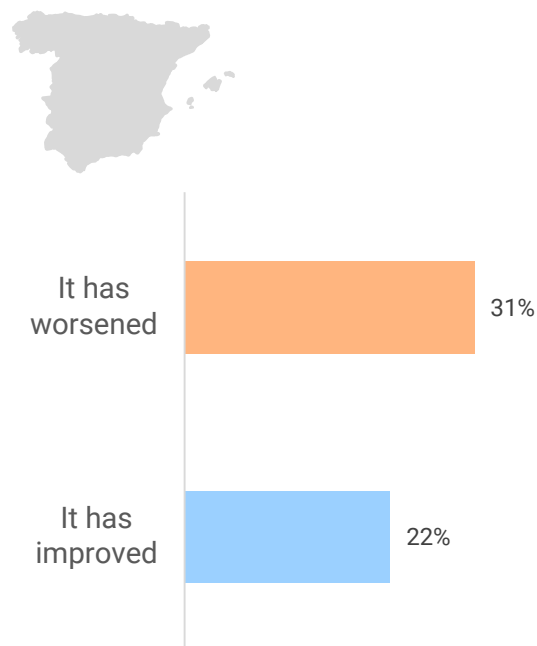
Question: Have these events improved or worsened the rating and image of Spain and Catalonia?

The image of Catalonia improves while Spain's tends to get worse

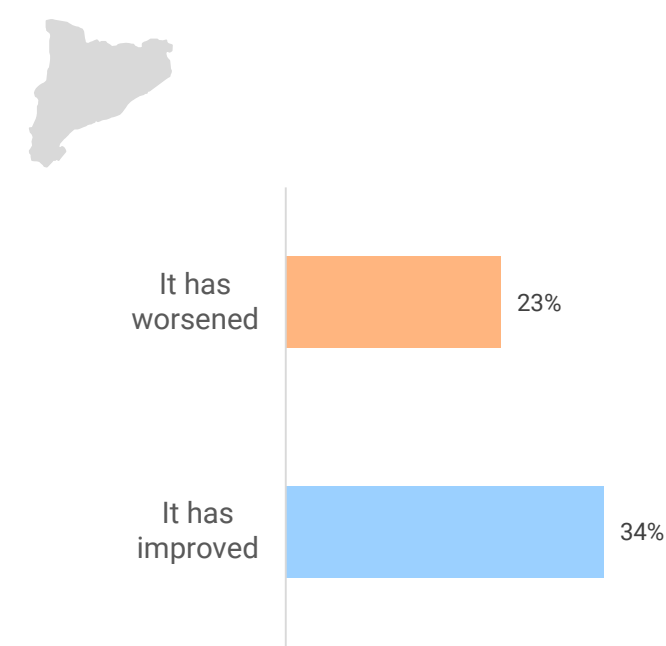
The image of Catalonia has improved (34% vs. 23%) and the image of Spain has worsened (31% vs. 22%) with the Catalan political crisis.

Impact on the rating among those who know the facts and have changed their perception:

How the image of Spain has been affected



How the image of Catalonia has been affected

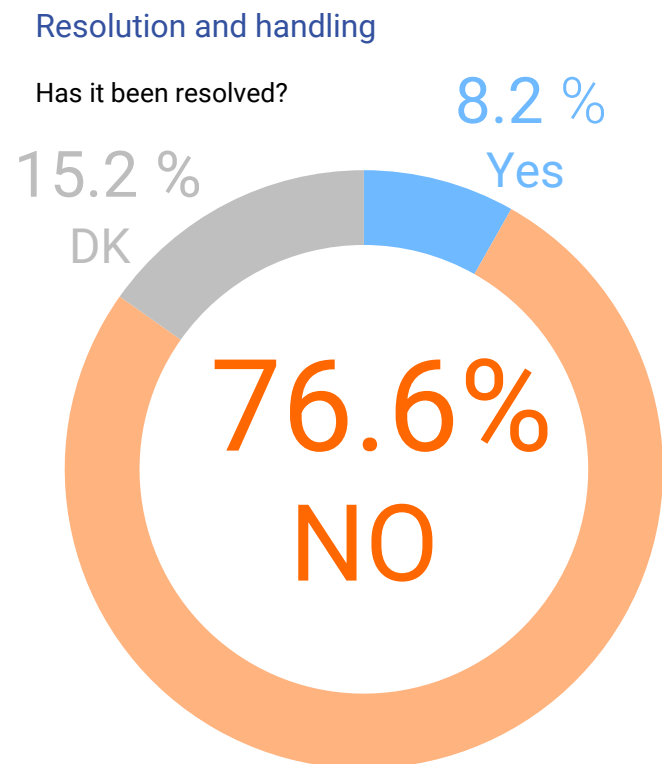


Question: Have these events improved or worsened the rating and image of Spain and Catalonia?

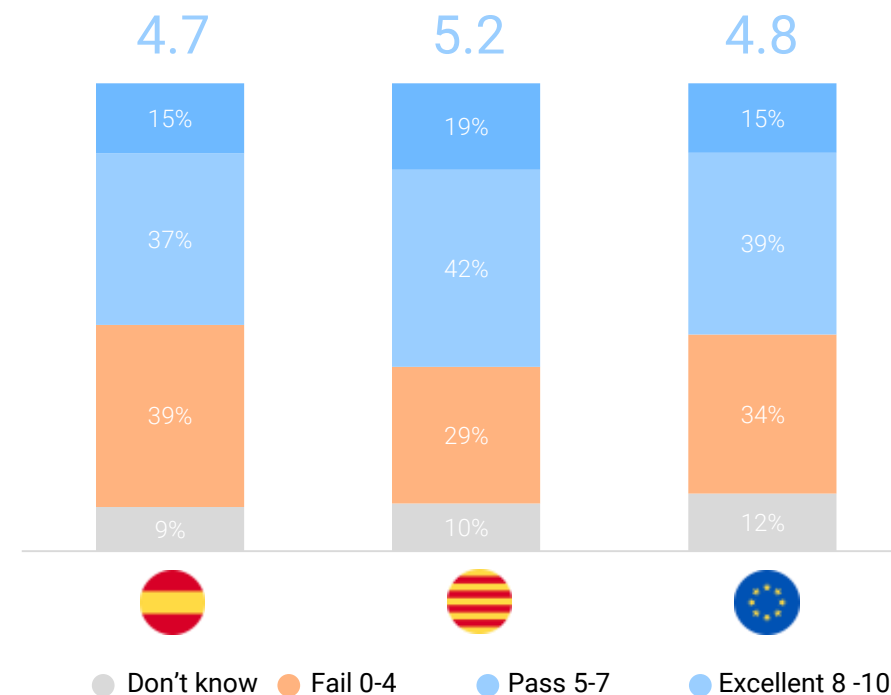
The conflict is unresolved and has not been handled well

76.6% consider that the conflict between Catalonia and Spain is unresolved. The Spanish government's handling of it fails.

European society considers that the worst handling of the conflict has been by the Spanish government and more than 39% fail its actions. The actions of the Catalan government pass narrowly.



Rating of how it has been handled by governments



Question: Do you think that the conflict between Catalonia and Spain has been resolved? // From 0 to 10, how do you rate the way each government has handled this conflict? //

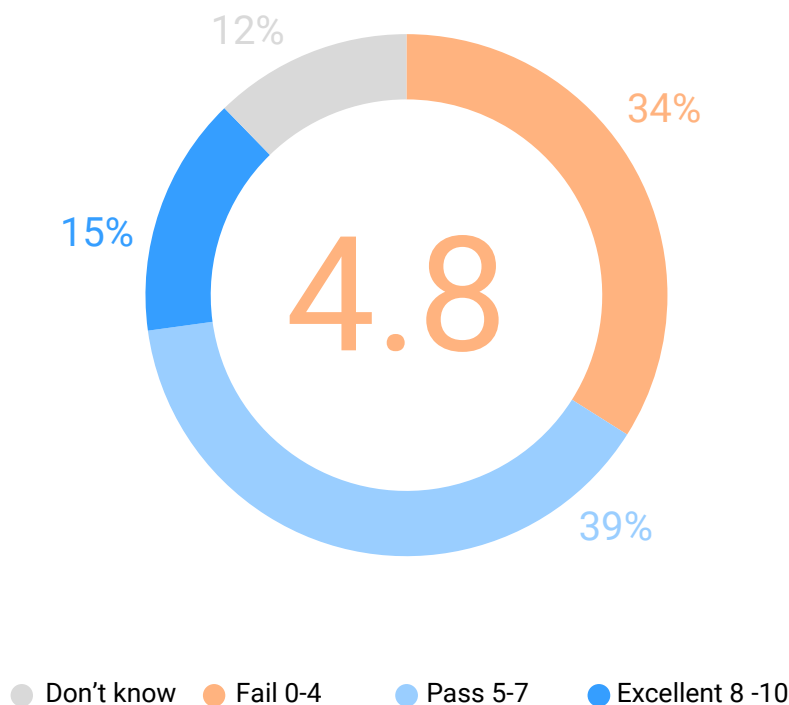
Thinking about the measures taken by the Spanish government in relation to the conflict with Catalonia, do you agree or disagree with the following statements?

Europeans rate with 4.8 the handling of the Catalan conflict by the EU

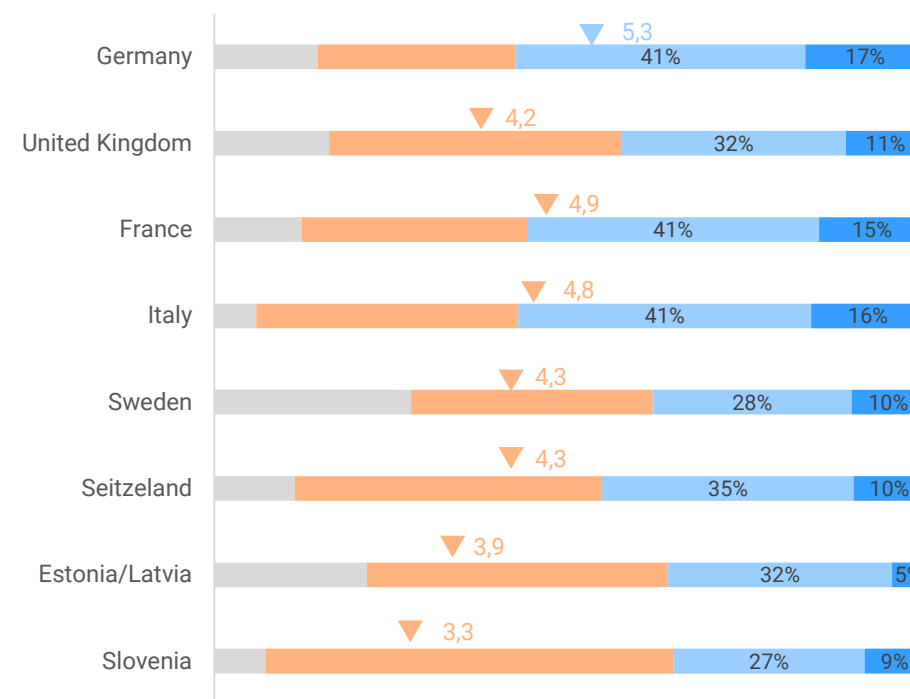
34% of Europeans consider that the EU's handling of the Catalan conflict has been wrong. 39% rate it as having passed and 15% think its handling has been excellent. The mean score is 4.85.

Only Germany passes the EU's handling. The most critical countries are Estonia/ Latvia and Slovenia

Rating of the EU's handling of the Catalan conflict



Rating by country



Question: From 0 to 10, how do you rate the way each government has handled this conflict?

Europeans believe that the EU should mediate

The respondents consider that the EU should act as mediator between the Spanish and Catalan governments.

42% believe that the EU should act as mediator between the two governments; 18% consider that it should support the government of Catalonia and allow a referendum to be held; 16% consider that it should support the Spanish government and 14% that it should not take sides.

Role of the EU



Not take sides



14%

Support the Spanish government and defend the unity of Spain



16%

Support the Catalan government and allow a referendum to be held



18%

Act as mediator between the two governments



42%

Don't know



10%



10%



16%



22%



11%



13%



14%



8%



8%

14%

14%

20%

19%

11%

17%

10%

7%

17%

17%

15%

19%

22%

20%

25%

27%

48%

43%

31%

44%

35%

41%

46%

52%

10%

11%

13%

8%

19%

8%

12%

7%

● European Union

Question: What do you think the European Union should do about the Catalonia-Spain issue?

DE and CH believe that their governments should act as mediators

The United Kingdom is the country most in favour of not getting involved. Slovenia is the most convinced of intervening favourably.

27% believe that their government should act as mediator (36% Germany and 34% Switzerland).
14% believe that their government should support Catalonia (48% Slovenia, 25% Estonia / Latvia, 22% Sweden)

Role of the EU and members of the union (own country)



Not take sides



Support the Spanish government and defend the unity of Spain



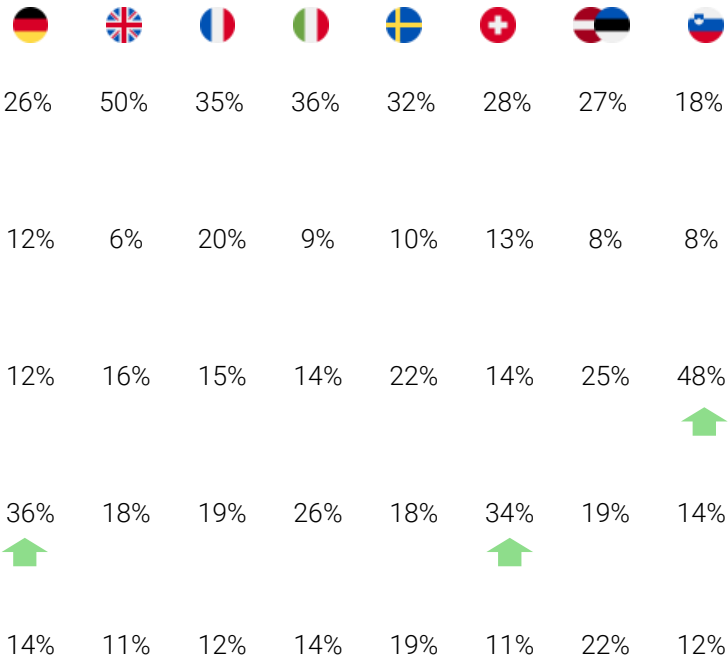
Support the Catalan government and allow a referendum to be held



Act as mediator between the two governments



Don't know



● Own country

05

CONCLUSIONS

Executive Summary

CONCLUSIONS

- **Catalonia is highly rated** by European citizens.
- Catalonia stands out as an **attractive, dynamic** location, with a **good climate**, where it is **easy to have fun** and **eat well**. Catalonia also stands out because of its **political situation** (independence movement), which is mentioned spontaneously by 27% of respondents and is the most frequently mentioned concept.
- Catalonia is highly rated in particular as a **tourist destination**. Catalonia is an **attractive location**, with a **good climate**, **interesting, modern** and with its **own unique character**.
- Catalonia is perceived as a place where it is **easy to do business** and stands out for its **people, its working culture**, the **good economic** and its **geographic location**.
- The Catalan political crisis has changed the opinion of more than half of Europeans about Spain and Catalonia. Among those whose opinion has changed, the crisis has **deteriorated the image of Spain, while the image of Catalonia is strengthened in some countries**.
- There is an opinion that the **European Union** should intervene and act as a **mediator** in the conflict.