**Branding of official statistics: new evidence and recommendations**

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**Abstract**

*Better communicating on the value of official statistics has been identified as a strategic need for statistical organisations. It is one of the key goals of the ESS Vision 2020 and it is implemented through the DIGICOM project (Digital Communication, User Analytics and Innovative products).*

*In this context, Eurostat has commissioned a study to get a better understanding of users' perception of official statistics, as well as strategic and operational recommendations on communication. The study will look at general branding aspects, such as brand awareness (do users know the various brands) and brand positioning (how do users perceive the brand as regards its competitors?). It will also cover users' views on the quality of European statistics (Do users associate European statistics with high quality? Which quality aspects are important for them? Are there quality gaps?)*

*This study will be carried out from December 2017 to June 2018 in 8 EU Member States. It will mainly rely on qualitative methods (focus groups and in-depth interviews of representatives of the main user groups), but will also include e-reputation analysis and a quantitative survey. This paper will present the methodology and early results of this study for Eurostat and the ESS as a whole.*

**Keywords:** Communication, branding, user perception, value of official statistics

**1. Introduction**

*1.1. What is branding?*

Generally speaking, branding connotes putting a mark as a proof of ownership, as a sign of quality, or for any other purpose. Branding can be tangible, as branding livestock, or figurative, as impressing something on memory. Today branding is increasingly associated with business and related promotional activities, as in applying "a trademark or brand to (a product); to promote (a product or service) on the basis of a brand name or design"[[1]](#footnote-1).

Branding in the latter sense was initially a response of American companies in the 1950's to growing competition in markets they had previously dominated. In order to maintain their market position, these "category leaders" had to differentiate themselves and their products from others by creating a distinct identity, a brand.[[2]](#footnote-2)

Although still largely associated with the private sector and business, the public and the non-profit sectors have recognised the importance and value of branding in making themselves and their products and services known. Non-governmental organisations such as the Red Cross and the World Wildlife Fund, for example, have developed clear and distinct identities in support of their goals.

*1.2. Why is branding important?*

The ESS Vision 2020[[3]](#footnote-3), a common strategic response of the European Statistical System (ESS) to the challenges that official statistics are facing, underlines that "*the data revolution leads to more competitive pressure from new data producers"* which can challenge the position of official statistics providers. As a response to increased competition, the ESS Vision aims for future-proof dissemination and communication strategies and explicitly foresees work on branding. This action is carried out by the DIGICOM project which is implementing the Vision in the field of communication.

The importance of branding is also underlined by the UNECE group currently working on the Strategic Communications project[[4]](#footnote-4). The group identified a number of reasons why investment in the brand is important for statistical organisations: (1) An effective brand builds trust, gives credibility and differentiates from others who work in the same or similar field, (2) all organisations have a brand (whether it is acknowledged or not), it is therefore important to control it, and (3) a well-defined brand results in implicit reuse of your information by users.

Since branding is relatively new for statistical organisations, it may still be associated with negative connotations, related to business and marketing. However, maintaining professional reputation and user trust is a long-standing key concern for statistical organisations. The setting up and the work of the UNECE Task Force on the Value of Official Statistics underline that it is not enough to have a comparative advantage if it is not acknowledged, and that, therefore, it needs to be exploited. The Task Force recommends that statistical authorities develop and actively promote their brands, in order to gain visibility and recognition.[[5]](#footnote-5)

Moreover, branding implicitly means and explicitly requires understanding users and their needs. Public organisations, by their nature and by being accountable for the public funding allocated to them, are committed to identifying and satisfying user needs. Gauging user perceptions can help organisations to better understand users' needs and to tailor their products and services accordingly.

*1.3. Branding and quality are strongly related*

While there are several definitions of branding, the following definition clearly shows that the brand is intrinsically related with quality: "*Unique design, sign, symbol, words (…), employed in creating an* ***image*** *that identifies a product**and* ***differentiates*** *it from its competitors. This image becomes associated with**a* ***level of******credibility, quality, and satisfaction in the consumer's mind****. Thus brands* ***help consumers in crowded and complex marketplace****, by standing for certain benefits and valu*e"[[6]](#footnote-6).

The Vision recognises that *"quality is one of our key assets and comparative advantages in a world experiencing a growing trend of instant information which often lacks the necessary “proof of quality”.* The QUAL@ESS Vision 2020 supporting framework strives to further enhance the quality of European statistics so as to provide fit-for-purpose products and services of high quality that help to maintain and increase public trust in official statistics. Seeing the synergies and links between quality and communications, it was decided to set up a joint DIGICOM-QUAL study on user perception of official statistics that could feed into the ESS work on communication and quality.

*1.4 The need for more evidence*

The legal framework for the ESS, the European Statistics Code of Practice and the European Statistical programme set the stage for delivering user-centred statistical products of high quality. While the National Statistical Institutes (NSIs) of EU Member States and Eurostat regularly carry out user satisfaction surveys, it was considered that more information was needed to improve our understanding of the European citizen's perceptions by (1) gauging the views of the users of our statistics that are not captured in user satisfaction surveys, as well as those of non-users, and (2) deepening our understanding through qualitative methods and an online reputation survey based on a harmonised approach. Owing to the specific expertise needed, the work was outsourced and the contract was awarded to a communication consultancy and research institute.

**2. Objectives: learning from users on their perception of official statistics to improve our brands**

*2.1. Assumptions*

As producers of official statistics and partners in the ESS, we work with and are guided by a number of assumptions that may be challenged by the study.

***Assumption 1: Users understand what the ESS is***

The European Statistical System (ESS) is an entity composed of several constituents which all have separate but closely linked identities – the European Commission (Eurostat), the National Statistical Institutes (NSIs) of the EU Member States, and other national authorities producing European statistics. Eurostat uses different means, such as its website, publications and events, to explain how the different pieces fit into the whole and how the ESS work. But is this really understood by users? The study is looking into whether users and potential users are aware of the different producers of statistics at the European level, and if so, how they perceive these producers.

***Assumption 2: Users value primarily quality in official statistics***

The ESS has a well-established quality framework with a robust legal basis. Regulation (EC) No 223/2009 of the European Parliament and of the Council on European statistics[[7]](#footnote-7) defines how these statistics are to be developed, produced and disseminated, and it sets out the quality criteria for these statistics. The European Statistics Code of Practice contains 16 principles which govern the institutional environment, the statistical processes and the statistical outputs. Generic and sector-specific quality assurance methods and tools help to assess quality and implement the Code.

The ESS assumes that adherence to the quality framework guarantees high quality, and that high quality translates into recognition and a competitive advantage and (a relatively) secure market position over other players in the information market. This assumption is being challenged, however, by increased competition brought on by the surge of new and non-traditional producers of data and information, accelerated by advances in technology.

The study intends to find out, through collecting and analysing users' perception on the quality of statistics, whether a competitive quality advantage does exist, and, furthermore, if it proves to exist, how to best exploit it in promoting European statistics. Conversely, if it does not, the study tries to result in recommendations on how to improve the quality, starting from the underlying quality criteria.

***Assumption 3: Users understand the difference between official statistics and experimental statistics***

Experimental statistics is one response to the increased demand for timelier statistics and for new data sets. Whilst expedient, experimental statistics are not subject to the same rigorous quality requirements as official statistics, the safeguarding of trust in official statistics, conferred to it by virtue of the high quality standards applied, is one of the highest priorities of the ESS. It is therefore essential that there is no confusion between experimental statistics and official statistics. However, if the same entity publishes both experimental statistics and official statistics, it could be argued that this carries a certain reputational risk for the institution, and that the likelihood of this actually materialising has to be reduced. This is why Eurostat’s experimental statistics are disseminated via separate webpages on the Eurostat website, marked with a clearly visible logo (and “experimental” captions in the database) and accompanied by detailed methodological notes. One of the purposes of the study is to check whether the launch of experimental statistics has an impact on trust in European statistics.

*2.2. Goals and expected outcomes*

The study has the following main goals:

1. To reach a better understanding of users’ perception of the current brand(s) related to official statistics in the EU. This includes the brands Eurostat/ESS/European statistics as well as the brands of (some) NSIs. The study purports to find out whether users are aware of the producers of statistics at the European level, and if so, do the statistics they use meet their needs. To reach a better understanding users’ perception of the quality of European statistics (strengths and weaknesses) against the quality criteria set out in the Regulation on European statistics; as well as quality reporting and experimental statistics.

2. Based on the collected users' perception and their analysis, to understand how the quality of European statistics could be improved, in case the users find that the current quality criteria do not help to meet their needs.

3. Based on a better insight into users expectations and needs, to help understand how to improve the communication of official statistics and promote them to different target groups.

The study should result in strategic and operational recommendations on:

* the market position of European statistics/Eurostat/European Statistical System: the competitive quality edge - which aspects distinguish European statistics from other available statistics in these domains; should quality be the central point of the branding and communication strategy?
* possible improvements of the brands (in particular Eurostat, the European Statistical System and European statistics) and a mission statement;
* communicating and promoting the brand to various target groups, including reaching out to new audiences, and better explaining the added value of official statistics at both national and European level;
* aspects of the quality of European statistics that may need to be improved, in particular along the quality criteria;
* capitalising on quality strengths in communicating and promoting European statistics.
* whether and how to promote experimental statistics.

**3. Methodology**

A comprehensive methodology was developed for the study, embedding both customers (users of statistics and potential users) and market insights. The study seeks to assess the perceptions of various user groups as well as the general public, and to compare them with the internal perception. The inception phase focused on desk research and literature review, in particular on analysing the user satisfaction surveys from the National Statistical Institutes (NSIs) and Eurostat and the reports from the 2013-2015 ESS peer reviews on the compliance of the NSIs and Eurostat with the European Statistics Code of Practice. The ongoing interim phase focuses on field work combining qualitative and quantitative methods. The final phase will deal with cross data analysis and collaborative workshops to elaborate the recommendations. The different components of the field work are outlined below.

*3.1. Collecting the perceptions of stakeholders through focus groups and interviews*

Focus groups and interviews are at the heart of the assignment to gather direct feedback from external stakeholders on their knowledge and perceptions regarding the provision of statistics in the EU. The material collected during the fieldwork is being used to answer the questions related to brand awareness, brand attributes, brand positioning and perception of quality, including quality reporting and experimental statistics.

Altogether 17 focus groups are being carried out in eight EU Member States. The participating Member States were chosen based on their involvement in DIGICOM. The focus groups aim at obtaining in-depth insights on how the targeted individuals perceived Eurostat and other statistics producers. They provide a platform for informal and open discussions and allow gathering rich material for the study as participants could react to and build upon inputs provided by others. In each country, one focus group is planned for heavy users and another for light and intermediate users.

In addition, 28 qualitative interviews are conducted, either face-to-face or by phone. The purpose of the interview programme is to collect direct feedback from specific users. These users' (journalists, members of political parties and re-disseminators) opinions are essential but their profile made it difficult to involve them in a focus group.

*3.2. Online survey*

The contractor is conducting an online survey in 27 Member States (all but Malta for lack of a platform). The survey targets the general public and includes questions on awareness, trust, perception of quality and positioning.

The objective is to provide a harmonised population-based survey on EU official statistics, so as to:

* assess the level of awareness, the image and level of trust of EU citizens regarding EU official statistics;
* get an overview of citizens’ perceptions of official statistics in its ecosystem at the EU level; and
* gauge perceptions at regional or national level.

*3.3 Web and social media monitoring*

The contractor performs web monitoring (media, blogs, forums and other websites) and social media listening (Facebook and Twitter) of the Eurostat and ESS accounts as well as those of key stakeholders and influencers. This was done using the e-reputation platform Brandwatch.

The objectives of web and social media monitoring are to:

* assess what Eurostat and the ESS share on the web and on social media;
* assess what the web says about Eurostat and the ESS;
* understand how influential stakeholders impact on the web; and
* gauge the needs and online behaviours of users and non-users.

The contractor also uses the European statistics User Forum and the Eurostat Facebook account to collect data regarding the needs of advanced users and regular users and to spotlight Eurostat's and the ESS' desire to engage with users.

**4. Results from desk research**

*4.1. Quality - perception from user satisfaction surveys*

User satisfaction surveys (USS) are conducted to assess the degree to which statistics' producers meet user needs. The content of the surveys is highly heterogeneous in the ESS. As each NSI independently launches its USS, the structure, the channel and sample sizes differ from one country to another. This heterogeneity makes the aggregation of information difficult.

This finding highlighted the lack of harmonised user satisfaction surveys across the ESS. The population-based survey reviewing all seven quality criteria and trust in European statistics, which is being conducted in the fieldwork phase of the project, seeks to bridge this gap for the purposes of the study. The lack of compatible information, however, begs the question as to whether the ESS would benefit from harmonised user-satisfaction surveys, or surveys with a common section dealing with European statistics.

The first Eurostat USS was conducted in 2007, and they have been conducted every year since 2011. They are designed to obtain better knowledge of users, their needs and satisfaction with the quality of European statistics and the services provided by Eurostat. The survey is sent to registered users; academics, students and private users account for more than 40% of respondents.

The surveys have revealed an overall positive perception of Eurostat's products and their dissemination, whatever the subject addressed or the profile of users. However, since the user satisfaction survey is both optional and addressed to registered users only, there may be a strong selection bias and non-representativeness of all users. Besides, Eurostat USSs do not cover all the seven quality criteria. Eurostat USSs 2015, 2016 and 2017 only included the two quality criteria 'timeliness' and 'comparability' and an additional quality aspect 'completeness'.

As for the national USSs, they sometimes explicitly refer to the European Statistics Code of Practice (CoP) and address the quality criteria. However, not all criteria are systematically and specifically covered. Other terms similar to the quality criteria may also be used instead. For instance, “*meeting the needs*” can be used instead of 'relevance'.

In general, accuracy, accessibility and timeliness of the quality criteria are included in the USS. On the contrary, punctuality, comparability and coherence seem to be little referred to in the surveys. The USSs generally seem to lack indicators regarding dissemination tools (database, reports, monthly bulletin, social network etc.).

*4.2. Brand and image insights from population-based surveys and Eurobarometer*

A few countries survey the general population on trust, awareness and positioning (e.g. Ireland, France, Luxembourg, Denmark and Germany). These reports as well as the Eurobarometer[[8]](#footnote-8) on European citizens’ trust on economic statistics were also analysed.

*On trust*

According to the Eurobarometer (Standard Eurobarometer 83) a majority of respondents viewed economic statistics as important to conducting economic policy (59%), a little less than 50% tended to trust official statistics. **The gap between importance and trust in economic statistics was the same in all European countrie**s.

When measuring trust in statistical institutions and in the statistics they produce, **respondents tended to have greater confidence in the statistical institutions than in their statistics**. Amongst the countries for which material was available for the purposes of the study, this was the case in France, where 71% of respondents trusted the national statistical institute *Insee*, but only 43% of respondents trusted the socio-economic statistics provided by *Insee*. In Denmark, 85% of respondents trusted Statistics Denmark whereas 78% trusted the individual statistical series (58% thought that the GDP statistics reflected reality, the share being 49% for unemployment). A similar trust gap was observable in Luxembourg, where 88% of the respondents trusted the National Statistical Institute *Statec,* but 68% trusted Luxembourgish official statistics.

The Irish user research revealed another kind of **trust** **gap, namely in the attitudes towards the National Statistical Institute between users and non-users**. Based on the research, 59% of non-users trusted the National Statistical Institute CSO, while 91% of users found the institute trustworthy.

*On awareness*

The desk research revealed that respondents to population-based surveys usually knew their National Statistical Institute and were generally aware of their activities, whereas they were somewhat less aware about the products and services. For example:

* 62% of Irish citizens were aware of *CSO* as a statistical products provider,
* 45% of French citizens were aware that *INSEE* provides socio-economic statistics[[9]](#footnote-9),
* 95% of Luxembourg residents were aware of *STATEC* as the NSI,
* 67% of Danes knew *Statistics Denmark* and 91% had at least heard the name.

The **results available on population-based surveys show that the general public is mostly aware of its National Statistical Institute.** Eurostat, however, seemed to be little known to respondents to national surveys. In Ireland, 23% of non-users mentioned Eurostat as a statistics provider (when prompted), behind the IMF (41%), the WHO (38%) and the OECD (25%). In the other population-based surveys looked into, Eurostat was not spontaneously mentioned by respondents (France) or was not prompted in the questionnaires (Luxembourg, Denmark, and Germany)

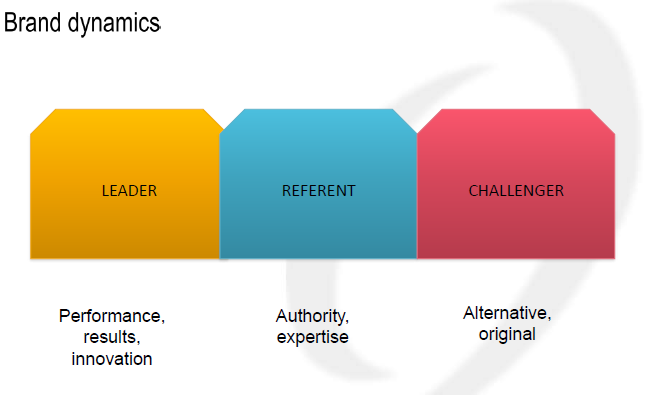
*On positioning*

The national surveys which were analysed did not provide much information on the positioning of the NSIs. Based on the available information, however, the Irish National Statistical Institute was among the most quoted statistics providers at the national level together with other administrative official statistics providers (such as the tax administration, employment agency and the central bank). The same result could be observed in France, where 45% of the respondents mentioned *Insee* as a statistics and data provider on socio-economic matters ahead of polling institutes (25%) and the media (11%).

**5. Next steps**

At this stage only preliminary findings are available. Highlights comprise:

* Branding can be considered to become increasingly important also for European statistical organisations. In an era in which statistics are provided by multiple players, statistical organisations can benefit from branding in terms of promoting and offering their products and services to as wide a section of the society as possible and to more clearly communicating their value added.
* Addressing at the same time user perceptions, communication and quality perspectives of official statistics provides new insights and takes into account the fact that quality is increasingly defined as "fit-for-purpose", implying a good knowledge of users' purpose and expectations. Moreover, the trust in the brands of statistical organisations largely relies on quality.
* The general public seems to be mostly aware of its National Statistical Institute whereas Eurostat seems to be less well known.
* A trust gap can be observed between statistics producers and the statistics they provide. This would seem to indicate that an awareness of the brand does not automatically translate into trusting and using the statistical products. This would require actively building upon and investing in users' awareness.
* A recurrent finding across statistical organisations relates to a trust gap between users and non-users. Thus, it can be important to design specific initiatives addressing non-users.
* User satisfaction surveys vary greatly among ESS members and reflections could be made to harmonise selected aspects to allow for further analysis.
* As shown in the visual below, statistical organisations – like any other entities investing in their brands - would need to reflect on their desired positioning. In order to be effective, branding needs to take into account whether an actor would like to be seen as a 'referent', with the focus on authority and expertise in the field, or as a 'leader', with the focus on results and innovation. This would need to be reflected in the respective communication strategies.



Next steps of the study will include the finalisation of the fieldwork, cross-data analysis and the elaboration of strategic and operational recommendations

1. <http://www.oed.com/view/Entry/22628?rskey=g2mfFy&result=2#eid> [↑](#footnote-ref-1)
2. <https://www.theatlantic.com/business/archive/2011/10/how-brands-were-born-a-brief-history-of-modern-marketing/246012/> [↑](#footnote-ref-2)
3. [ESS Vision 2020 – building the future of European Statistics](http://ec.europa.eu/eurostat/documents/7330775/7339647/ESS+vision+2020+brochure/4baffcaa-9469-4372-b1ea-40784ca1db62) [↑](#footnote-ref-3)
4. <https://statswiki.unece.org/display/hlgbas/Modernisation+Projects> [↑](#footnote-ref-4)
5. [https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/2016/mtg/CES\_11\_- ENG\_G1602756.pdf](https://www.unece.org/fileadmin/DAM/stats/documents/ece/ces/2016/mtg/CES_11_-%20%20%20%20ENG_G1602756.pdf) [↑](#footnote-ref-5)
6. online business dictionary [↑](#footnote-ref-6)
7. <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:02009R0223-20150608&qid=1435820363605&from=EN> [↑](#footnote-ref-7)
8. <http://ec.europa.eu/public_opinion/archives/eb/eb83/eb83_stat_en.pdf> [↑](#footnote-ref-8)
9. The question was formulated differently in France, with a specific focus on socio-economic indicators. This resulted in a lower score on awareness compared to other institutes for which the question on awareness had a broader scope. [↑](#footnote-ref-9)