

Verian | Executive summary of the report on public preferences for new euro banknote themes

29 November 2023



Executive summary

As part of the process for redesigning the euro banknotes, the European Central Bank (ECB) has asked people in the euro area about their preferences regarding the following seven themes proposed by the Governing Council of the ECB: “Birds: free, resilient, inspiring”, “European culture”, “European values mirrored in nature”, “The future is yours”, “Hands: together we build Europe”, “Our Europe, ourselves” and “Rivers: the waters of life in Europe”.

The ECB commissioned Kantar Public¹, an independent research company, to carry out a survey (referred to in this report as the “Kantar Public survey”). The aim was to ensure that people’s opinions were represented equally across all euro area countries and across different genders and age groups. In this survey, conducted between 20 June and 7 August 2023, a representative sample of 23,377 respondents were interviewed in the 20 euro area countries and in Bulgaria (as the next country on its path to adopt the euro).

To give all Europeans the opportunity to be involved in the process, an online public survey using the same questionnaire (referred to in this report as the “ECB online survey”) was launched alongside the Kantar Public survey. Approximately 376,000 valid responses to this survey were received between 10 July and 31 August 2023. It should be noted that the results of the ECB online survey are not representative of the euro area population. For instance, among those responding to the ECB online survey there was a significant bias towards some countries and young, well-educated male respondents. Although the results have been weighted to correct for some of this bias, the findings of the ECB online survey cannot be reliably extrapolated to represent the views of the people of the euro area. The ECB online survey nevertheless provides a useful additional perspective and a further insight into public preferences. It has also been a good opportunity to engage with European citizens and has significantly raised awareness about the redesign process.

Main results from the Kantar Public survey

The three themes identified as most preferred in the Kantar Public survey are as follows:

- “European culture” (preferred by 21% of euro area citizens)
- “Rivers: the waters of life in Europe” (preferred by 18% of euro area citizens)
- “Birds: free, resilient, inspiring” (preferred by 17% of euro area citizens)

The remaining four themes are much less popular. Only 13% and 12% of euro area citizens respectively say that they prefer the “European values mirrored in nature” and “Hands: together we build Europe” themes. Meanwhile, “The future is yours” and “Our Europe, ourselves” are the least preferred themes, with 10% and 9% of euro area citizens respectively rating them as their favourite option for the future euro banknotes.

“European culture” is the leading theme in 12 out of 20 euro area countries, as well as in Bulgaria. Specifically, it is the most preferred theme in six euro area countries and shares the top spot with another theme in six countries, alongside either “Rivers: the waters of life in Europe” or “Birds: free, resilient, inspiring”.

¹ Kantar Public became Verian on November 9th 2023. The survey for the European Central Bank was conducted in the summer of 2023, while Verian was still called “Kantar Public”. All references to “the Kantar Public survey” in this report therefore refer to the survey run by Verian (formerly Kantar Public).

Analysis of the Kantar Public survey shows that from a socio-demographic perspective, there are only slight variations in theme preferences by gender and age. “European culture” is the favourite theme across all genders and age groups. The preference for this theme is slightly higher among men (21%) than among women (20%). “Rivers: the waters of life in Europe” is slightly more popular among women (19%) than among men (18%). However, the preference for “Birds: free, resilient, inspiring” is notably higher among women (19%) than among men (16%).

An analysis by age shows that 22% of those aged 65 and over prefer “European culture”, compared with 18% in the 16-24 age group, while the percentages for the intermediate age groups lie somewhere in between. “Rivers: the waters of life in Europe” is a slightly more popular theme among those aged 40 and over (18-20%) than among the under-40s (16-17%). A similar trend is seen with the “Birds: free, resilient, inspiring” theme, which is more popular among those aged 25 and over (17-18%) than among those in the youngest age group (15%).

Educational levels influence theme preferences. “European culture” is favoured by 15% of respondents with a primary education, rising to 26% for those with a PhD or equivalent. Those with a higher education lean more towards this theme, while among the lower-educated population, preferences are spread across various themes. Among the primary-educated, “Rivers: the waters of life in Europe” is the top pick with 19%, ahead of “European culture” with 15%. Respondents with a post-secondary education favour “Rivers: the waters of life in Europe” (19%) and “European culture” (also 19%) slightly above the “Birds: free, resilient, inspiring” theme (18%).

While “European culture” and “Rivers: the waters of life in Europe” receive consistent support in the Kantar Public survey, the results for “Birds: free, resilient, inspiring” are mixed, making it a more polarising theme. It is liked a lot by 29% of the population, putting it just behind the other two (with 33% liking “European culture” a lot and 30% liking “Rivers: the waters of life in Europe” a lot). However, it is ranked only fifth in the “somewhat like it” category (32%). Its “dislike” rate (15%) is higher than those for both “European culture” (9%) and “Rivers: the waters of life in Europe” (11%).

Main results from the ECB online survey

Looking at the ECB online survey results, the top three themes are the same as in the Kantar Public survey, but in a different order. The ECB online survey results indicate that the most preferred themes for euro area respondents are:

- “Birds: free, resilient, inspiring” (34%),
- “European culture” (23%)
- “Rivers: the waters of life in Europe” (16%).

The remaining four themes are much less popular. “European values mirrored in nature” is the favourite option for just 10% of respondents in the euro area. Meanwhile, only 8%, 6% and 5% of the population respectively cite “The future is yours”, “Hands: together we build Europe” and “Our Europe, ourselves” as their favourite option for the future euro banknotes.

The results of the ECB online survey show that “Birds: free, resilient, inspiring” is the leading theme in 16 out of 20 euro area countries. “European culture” is most frequently rated the favourite theme in the remaining four euro area countries and in Bulgaria.

The survey results also indicate that “Birds: free, resilient, inspiring” is the favourite theme in all gender, age and education groups. More women than men say they prefer this theme (36% versus 30%). As with the Kantar Public survey, the popularity of the theme declines with the educational level of respondents.

According to the ECB online survey, more than half of the population (51%) like the “Birds: free, resilient, inspiring” theme a lot, while the shares of Europeans liking “European culture” and “Rivers: the waters of life in Europe” are also substantial (39% and 31% respectively). The share of people disliking the “Birds: free, resilient, inspiring” theme a lot is a fraction higher (9%) than the corresponding shares for “European culture” and “Rivers: the waters of life in Europe” (both 8%). The shares of Europeans disliking the other themes a lot are significantly higher. In general, the opinions of the respondents are more varied than those expressed in the Kantar Public survey.