



ANNUAL SURVEY REPORT: ARMENIA

2nd Wave (Spring 2017)

OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood

June 2017

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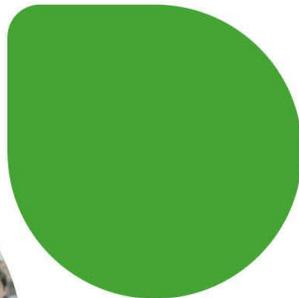
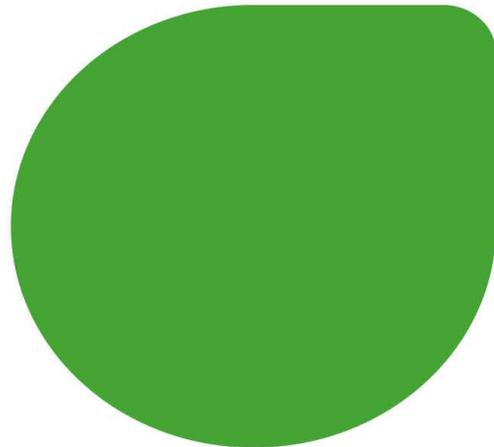


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*The surveys have been carried out in the six Eastern Partner countries by ACT LLC
and their network partners*

1. Background

Between March and May 2017, a second wave of annual surveys was carried out across the six Eastern Partner countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (‘**EU NEIGHBOURS east**’) project.

The ‘**EU NEIGHBOURS east**’ project aims to increase the understanding of EU support in the Eastern Partnership (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in Eastern Partnership countries.

The project is developing information and communication materials, carry out awareness-raising and information campaigns, and assesses the perception of the EU and its support through opinion polling and media monitoring.

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have about the EU in general and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **Annual Survey – 2nd wave** (Spring 2017) conducted in **Armenia**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Armenia
- Awareness of financial support provided by the EU and assessment of its effectiveness
- Sources of information
- Country evaluation and future expectations

Alongside an analysis of the results of the 2nd wave of the survey, this document provides a comparison between the findings of the 2016 and 2017 surveys where relevant.

¹ A similar report has been produced for each EaP country. Additionally, a macro-area report is being prepared that will compare the results across the region.

2. Research methodology in brief

The survey was conducted in April 2017, following the same methodology adopted in the previous round of data collection (Spring 2016): 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over and living in the country), the sampling weights were calculated by applying a specifically designed estimation procedure.

Sampling strategy

The survey used a two-stage sample design with settlements as primary sampling units (PSUs) and individuals as secondary units.

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population and level of urbanisation, and geographical area. Three groups of settlements² and three areas³ were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age⁴ were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

The individuals to be interviewed were selected randomly, according to the random walk⁵ principle.

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator was built based on the general category of model-assisted estimators (Deville and Särndal 1992). The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. Three new calibration variables (education level, religious faith and mother tongue) were added to those used in the previous wave (settlement size, gender, age, employment status and geographical area) to produce calibrated weights, and therefore to improve the quality of survey findings, as they allowed for a better correction of any selection bias. Nevertheless, it is worth mentioning that the introduction of additional auxiliary variables in the estimation procedure could occasionally explain part of the difference between the estimates of the two years.

² Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Medium-sized settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants) / Capital.

³ Geographical areas: 1) Centre (Yerevan, Kotayk, Aragatsotn, Gegharkunik, Gegharkunik); 2) North (Tavush, Lori, Shirak); 3) South (Ararat, Syunik, Vayoc dzor, Armavir).

⁴ Age groups: 1) 15-34 years; 2) 35-54 years; 3) 55 or more years.

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, it is necessary to define a step. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total predefined number of households.

3. Survey findings

3.1. Executive summary

General perceptions about the EU

- As in 2016, the image of the European Union among Armenian citizens is generally positive or at least neutral - 48% say they have a very or fairly positive image of the EU, while 37% feel neutral about the Union. Moreover, the negative attitudes have decreased compared to 2016 (13% in 2016 versus 5% in 2017), at the expense of a slightly more positive/neutral stance. The share of those who have no awareness or opinion about the EU is almost at the same level (7% in 2016 versus 10% in 2017).
- More than 80% of Armenians who have heard about/know the EU strongly believe that the EU represents such values as freedom of speech, human rights, individual freedom, rule of law and economic prosperity. However, only 53% of Armenians associate “absence of corruption” with the EU. Peace, security and stability (63%), economic prosperity (40%) and human rights (31%) are the most important personal values for Armenian citizens.
- The European Union is the most trusted foreign institution in Armenia. 65% of Armenian citizens trust the EU, followed by the United Nations (56%), the Eurasian Economic Union (50%) and NATO (35%).

EU relations with Armenia and awareness of EU financial support

- Three out of four Armenians (76%) describe their country’s relationship with the European Union as fairly or very good. This corresponds to the figures for 2016. Only 12% of Armenians think that relations are fairly or very bad, compared to 16% in the previous year.
- More than 65% of Armenian citizens know that the EU provides financial support to their country and most of them believe that this support is effective (67%).
- One third of Armenian citizens, who are aware of the EU’s financial support to Armenia, know about specific EU-funded programmes in Armenia. The most well-known EU-financed programmes in Armenia are educational programmes (37%) and health and medicine (31%).
- Nearly 40% of Armenian citizens believe that the Russian Federation provides more financial support to Armenia than the EU. One quarter of the population considers that the IMF/WB provides more financial support to their country than the EU. It should be highlighted that the proportion of individuals who believe that the Russian Federation or the IMF/WB are the bigger donors to Armenia compared to the EU has considerably decreased since 2016.
- The majority of Armenians believe that their country has fairly, and to a lesser extent, very much, benefitted from the EU’s support. The main benefits cited include increased access to more products and services (69%), increase in tourism (69%), improved quality of healthcare (64%), improved trade (60%) and infrastructure (59%), better education (53%) and greater economic development (51%).
- Almost half the population (45%) believes that economic development is the primary area where the EU should play a greater role in Armenia, followed by the creation of more employment opportunities (43%).

Attitudes towards the EU: a snapshot

- Not surprisingly, individuals who have a positive image of the EU are also more likely to be more positively oriented for all four indicators regarding the EU (level of trust, relationship between Armenia and the EU, awareness of the EU financial support, and effectiveness of the EU support). More than 80% of those who have a positive attitude also tend to trust the EU, compared to 55% of those who are mostly neutral. A difference of around 9% to 17% between positively and neutrally oriented people was recorded for the other three indicators.
- The top three values, which those Armenians with a positive image of the EU tend to link strongly and very strongly with the European Union, are human rights (93%), individual freedom (92%) and freedom of speech (91%).
- Similarly, those with positive attitudes towards the EU see more benefits for Armenia from the EU than those with a neutral perception.

Media usage as sources of information

- Television is the most popular medium in Armenia. 43% of Armenians always watch television, 28% often and 22% sometimes. The next most commonly used source of information is word of mouth (80%). Social media (used by 62% in total) and the internet (69%) also appear to be popular sources of information among the population.
- The vast majority of Armenians (42% always, 32% often and 18% sometimes) rely on media in their own language. The usage of foreign or Armenian media in Russian is also quite prevalent – more than half of Armenian citizens use Russian language media. As for consumption of other language media, it is relatively rare in Armenia (used by one quarter of the population).

Sources of information about the EU

- Only one third of Armenians claimed to have heard about the European Union in the last three months, as opposed to 51% in 2016.
- Most of the information recently obtained by people came from television (59%). 40% of Armenians have heard or seen information about the EU through the internet, 17% through social media and 11% by word of mouth. Radio, printed press and the official EU website was a source of information about the EU for less than 2% of the overall population.
- When asked to evaluate the image of the EU in the national media, nearly half of the Armenian population (48%) felt that the national media represented the European Union very positively (6%) or fairly positively (42%). The share of people who evaluated the presentation of the EU in the national media positively decreased by 20% in 2017. There has been a shift towards those with a neutral view, with 35% of Armenians believing that the EU is neutrally represented in the national media compared to 22% in 2016.
- Information about the European Union is accessed frequently or very frequently by less than 15% of the population, not very frequently by one third, and never by more than half of Armenian citizens (56%).

- The majority of people, who search for information about the EU, access information in their national language (66%), while 21% use Russian and 13% English language sources.
- The most commonly searched information about the European Union concerns educational and cultural programmes (38%), while 28% search for information about the social, political and economic news.
- Most people in Armenia, who search for information about the EU, rate the information as being accessible (very – 13%; fairly – 64%). They also think that the information is user-friendly (70%), comprehensive (66%), reliable (70%) and trustworthy (69%).

Source of information and attitude towards the EU

- Around three-quarters of Armenians acknowledge the good relationship between their country and the EU and the effectiveness of EU support, regardless of what kind of media source they use more frequently (73% among traditional media users and 76% among digital media users believe that there are good relationships between the EU and Armenia; 67% among traditional media users and 69% among digital media users affirm the effectiveness of the financial support).
- Social media and internet users, on the other hand, are more likely to trust the EU (73%), to have a positive image of the EU (57%) and be aware of EU support (71%) compared to traditional media users (54%, 47%, 62% respectively).
- The majority of people, regardless of whether they frequently access media in Russian or not, tend to assess the relationship between Armenia and the EU positively (82% among Russian media users and 72% among non-Russian media users). Moreover, people who frequently use media in Russian tend to have a more positive perception of the European Union (62%), to trust it (71%) and be aware of the EU's financial support to Armenia (74%), compared to those who do not frequently use Russian language media (47%, 62% and 62% respectively).

View of Armenia's current situation

- As in 2016, Armenians do not possess a great deal of trust in national, regional and local institutions, although the share of individuals, who tend to trust the institutions, has slightly increased compared to last year. Political parties remain the least trusted institution (24%) among Armenians. Just under a third of citizens (31%) trust religious authority.
- Only a quarter of the population seem to be satisfied with the current level of democracy in Armenia (25%), almost the same as in 2016 (26%). As for those “very satisfied” with the level of democracy, almost no one shares this opinion in Armenia (1%).
- The majority of Armenians believe that freedom of media (62%) and freedom of speech (59%) are ensured in their country, although these indicators are down compared to 2016 (freedom of the media 74%; freedom of speech 67%). The same applies to the protection of the rights of minorities: half the population believes that Armenia protects minority rights, compared to 67% in 2016. Lack of corruption, equality and social justice and free and fair elections were defined as the most problematic issues by the majority of Armenians (72%, 66% and 65% respectively), but the data shows the population is now less critical with regards to corruption and free and fair elections, which were identified as problematic issues by far more Armenians in 2016 (82% and 80% respectively).

Future expectations

- Armenians are generally more optimistic about their own future (65%) than the future of their country (46%), although in both cases the share of people who felt very optimistic is down since 2016, showing a shift towards moderate optimism.
- For the majority of Armenians (58%), unemployment is considered to be the most pressing problem, followed by migration (36%) and low salaries/pensions (30%).

Views of the country and attitude towards the EU

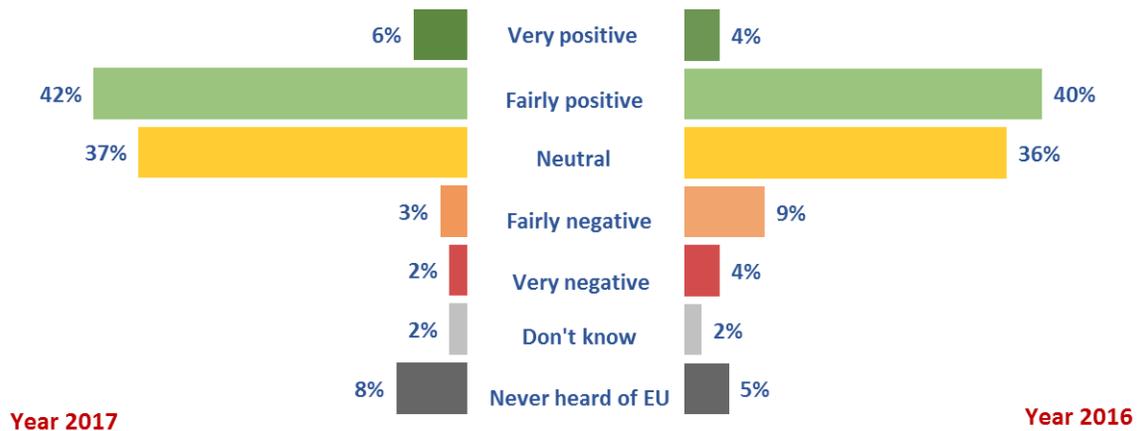
- According to the majority of assessed indicators (trust in institutions, satisfaction with the way democracy works in Armenia), no major differences were observed between those individuals who have a positive image of the EU and those who feel neutral about the Union.
- The gap between the two groups tends to shrink when it comes to optimism for the country's or personal future – people with a positive image of the EU are more optimistic in both cases (optimism for the country's future among those with a positive image of the EU 52%, among those with a neutral image of the EU 42%; optimism for personal future among those with a positive image of the EU 71%, among those with a neutral image of the EU 64%).
- Regardless of their attitude towards the European Union, Armenians indicated the same pressing problems in the country with unemployment and migration at the top of the list (58%-36%).

3.2. Perceptions about the European Union

3.2.1. General perceptions about the EU

As in 2016, the image of the European Union among Armenian citizens is generally positive or at least neutral (fig. 1) – 48% say they have a “very” or “fairly” positive image of the EU, while 37% feel neutral about it. Moreover, the negative attitudes have decreased compared to 2016 (13% in 2016 versus 5% in 2017), at the expense of a slightly more positive/neutral stance. The share of those who have no awareness or opinion about the EU is almost at the same level (7% in 2016 versus 10% in 2017).

FIGURE 1 – Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union? (Q2.1)



The attitude of Armenians towards the EU appears to be directly related to their level of education: 69% of highly educated people have a positive image of the EU compared to 42% for those with low and middle levels of education (tab. 1). Moreover, results suggest that the younger generation aged less than 55, the employed and/or self-employed, and residents of the southern part of the country feel more positive towards the European Union than other groups. Every second citizen in the above-mentioned groups has a positive image of the EU. People living in smaller settlements (less than 20,000 inhabitants) and men tend to have a less positive image of the EU compared to women and people from the larger settlements. It is also worth mentioning that Armenian citizens with a low/middle level of education (13%), those residing in smaller settlements (14%), the older generation (19%), and the unemployed and/or temporarily inactive population (14%) are less likely to know/have heard of the EU, compared to other groups.

TABLE 1 – Perception of the EU

Q2.1 Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?						
		Positive	Neutral	Negative	Don't know / Never heard	Total
Settlement Size	Capital	53%	31%	7%	9%	100%
	Between 20,000 and 150,000 inhabitants	53%	38%	5%	4%	100%
	Less than 20,000 inhabitants	42%	40%	4%	14%	100%
Gender	Male	45%	37%	8%	10%	100%
	Female	50%	36%	3%	11%	100%
Age group	15-34 years	51%	36%	4%	9%	100%
	35-54 years	50%	40%	5%	5%	100%
	55 years & above	41%	33%	7%	19%	100%
Education Level	Low-middle level	42%	40%	5%	13%	100%
	High level	69%	24%	5%	2%	100%
Employment status	Employed / Self employed	53%	37%	4%	6%	100%
	Unemployed or temporarily not working / inactive	43%	36%	6%	15%	100%
Geographical Area	Centre	49%	33%	6%	12%	100%
	North	37%	50%	6%	7%	100%
	South	53%	35%	1%	11%	100%
Total		48%	37%	5%	10%	100%

Armenians who have heard about/know the EU strongly believe that the EU represents such values as freedom of speech, human rights, individual freedom, rule of law and economic prosperity. Overall, more than 80% of people share the mentioned beliefs (ranging from 85 to 90% for different values). More than 70% of Armenian citizens are convinced that the EU represents such values as honesty & transparency (79%), democracy (79%), freedom of religion (78%), freedom of the media (78%), respect for other cultures, minorities (77%), equality and social justice (74%) and Peace, Security and Stability (71%) (tab. 2). A relatively weak association was observed with regards to the absence of corruption (only 53% of population share this belief). The findings are consistent with last year's survey results.

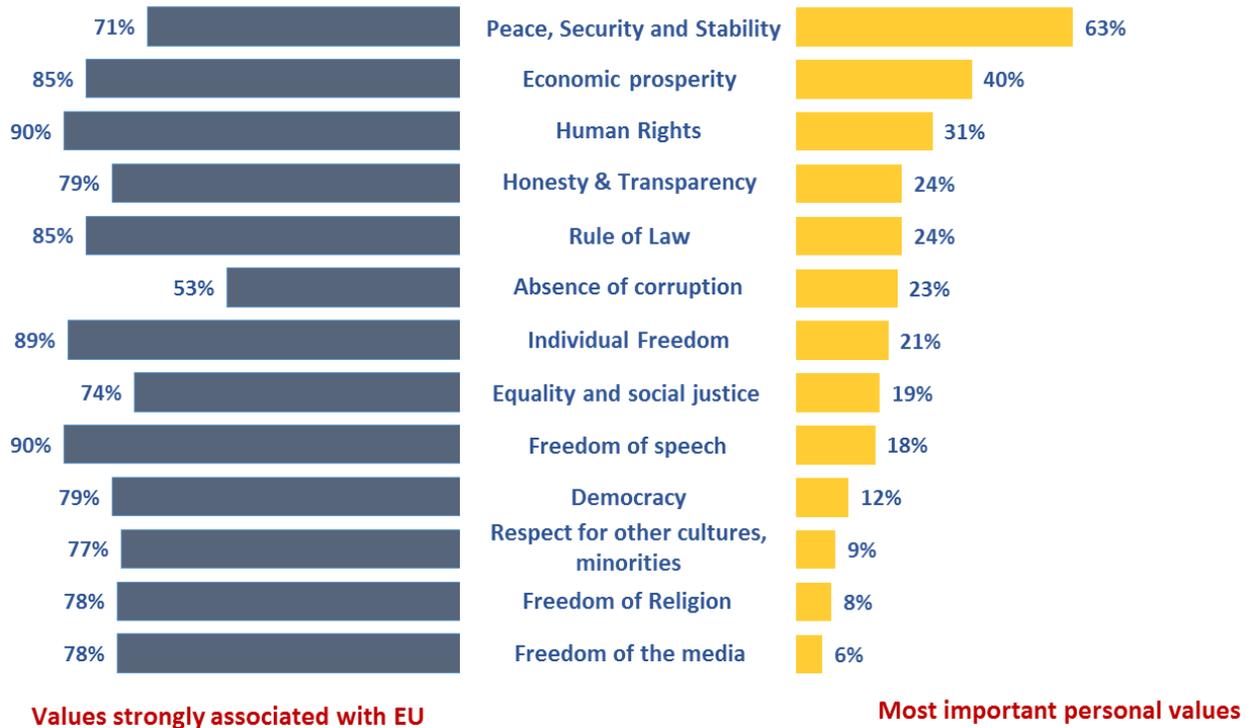
TABLE 2 – Values associated with the EU

Q2.3 - To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
Freedom of speech	37%	53%	4%	2%	4%	100%
Human Rights	43%	47%	5%	2%	3%	100%
Individual Freedom	42%	47%	5%	1%	5%	100%
Economic prosperity	32%	53%	9%	1%	5%	100%
Rule of Law	35%	50%	7%	3%	5%	100%
Honesty & Transparency	20%	59%	11%	3%	7%	100%
Democracy	26%	53%	9%	3%	9%	100%
Freedom of Religion	36%	42%	7%	2%	13%	100%
Freedom of the media	30%	48%	7%	4%	11%	100%
Respect for other cultures, minorities	28%	49%	11%	2%	10%	100%
Equality and social justice	20%	54%	15%	5%	6%	100%
Peace, Security and Stability	22%	49%	19%	6%	4%	100%
Absence of corruption	12%	41%	28%	8%	11%	100%

Percentages refer to Armenians who have heard about the EU

Figure 2 compares the values, which are strongly associated with the EU, with the most important personal values for Armenians⁶. Most Armenians tend to strongly associate with all the values associated with the EU, while peace, security and stability (63%), economic prosperity (40%) and human rights (31%) are the most important personal values. The one value that displayed a somewhat weaker association with the EU was absence of corruption (53%), which was also of relatively low importance on a personal level (23%). Moreover, freedom of the media, freedom of religion and respect for other cultures were rated as important personal values by less than 10% of Armenians, while they seem to be strongly associated with the EU (by more than 2/3 of the population).

FIGURE 2 – Values strongly or very strongly associated with the EU (Q2.3) & Three most important personal values (Q4.7)



Percentages refer to Armenians who have heard about the EU

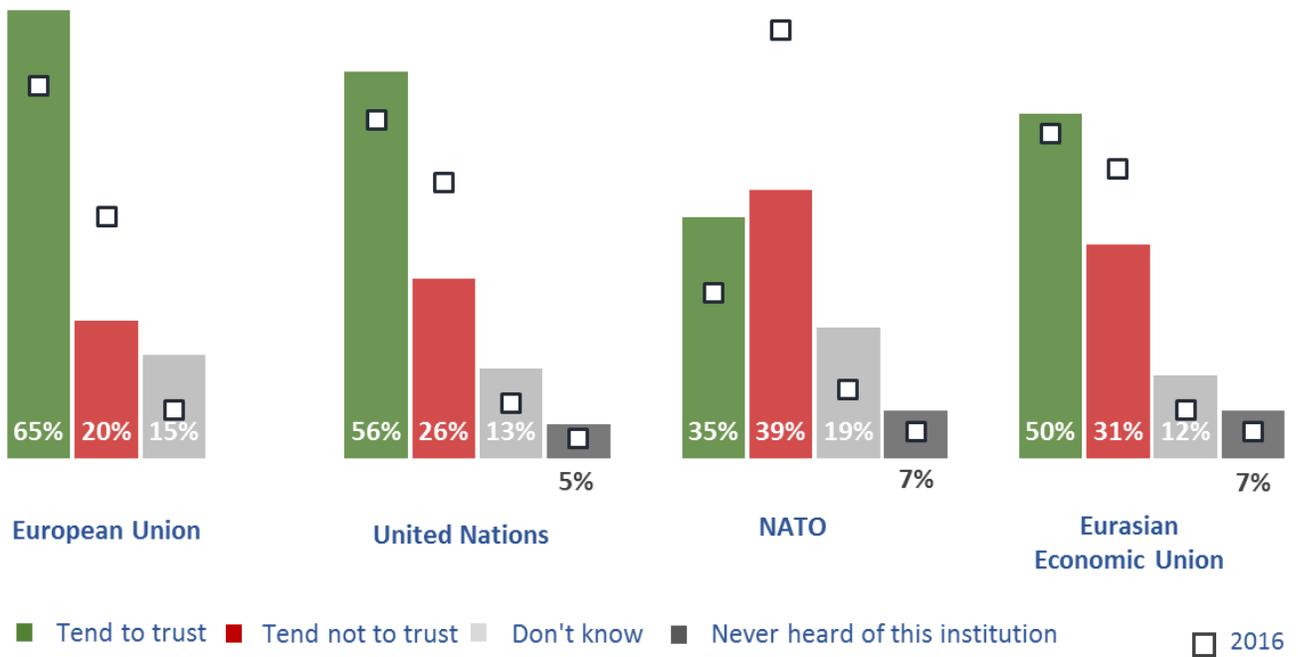
Perceptions of the EU were also assessed through an open-ended question, whereby respondents were asked to name the first issues that came to their mind when thinking of the EU. Positive associations mostly revolved around economic prosperity, rule of law, development and European integration (16%, 15%, 15% and 13% respectively). As for the negative perceptions related to the EU, they focus around the moral decline (3%), chaos and instability (1%) and unfairness (1%).

⁶ Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

The European Union appears to be the most trusted foreign institution in Armenia. 65% of Armenian citizens tend to trust the EU, followed by the United Nations (56%), the Eurasian Economic Union (50%) and NATO (35%) (fig. 3). The share of those who trust the EU and NATO has increased since 2016 (from 54% to 65% and from 24% to 35% respectively). Despite the increase in trust, NATO remains the least trusted institution among the four for the second year in a row.

Compared to 2016, it appears there has been an overall shift from distrust (which has considerably decreased) to a positive attitude and/or having no opinion, both of which have increased for all four institutions. Distrust in the EU has decreased by 15%, distrust in the UN from 40% to 26%, distrust in NATO from 62% to 39%, and distrust in the Eurasian Economic Union from 42% to 31%.

FIGURE 3 – Trust towards different institutions (Q2.11)



Percentages refer to Armenians who have heard about the EU

The level of trust in the European Union increases with the level of education: 79% of highly-educated individuals tend to trust the EU, compared to 62% of Armenians with low and/or middle levels of education (tab 3). The European Union is also more trusted by the residents of the southern part of the country (77%), employed individuals (71%), younger people (70%), and female citizens (68%). It is noteworthy that the same subgroups also have a more positive attitude towards the EU. Analysis by size of settlement did not reveal any considerable differences in terms of trust towards the EU.

TABLE 3 – Trust towards the European Union

Q2.11 - I would like to ask you a question about how much trust you have in the EU					
The European Union		Tend to trust	Tend not to trust	Don't know	Total
Settlement Size	Capital	65%	22%	13%	100%
	Between 20,000 -and150,000 inhabitants	63%	19%	17%	100%
	Less than 20,000 inhabitants	67%	19%	14%	100%
Gender	Male	62%	22%	16%	100%
	Female	68%	18%	13%	100%
Age group	15-34 years	70%	17%	14%	100%
	35-54 years	64%	23%	13%	100%
	55 years & above	60%	22%	18%	100%
Education level	Low-middle level	62%	21%	17%	100%
	High level	79%	16%	5%	100%
Employment status	Employed / Self employed	71%	17%	12%	100%
	Unemployed or temporarily not working / inactive	61%	23%	17%	100%
Geographical area	Centre	63%	24%	13%	100%
	North	59%	21%	20%	100%
	South	77%	10%	13%	100%
Total		65%	20%	15%	100%

Percentages refer to Armenians who have heard about the EU

3.2.2. EU relations with Armenia and awareness of EU financial support

Three out of four Armenians (76%) describe their country’s relationship with the European Union as fairly or very good as in 2016 (fig. 4) and only 12% of them think that relations are fairly or very bad compared to 16% in 2016.

FIGURE 4 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)



Percentages refer to Armenians who have heard about the EU

The opinion on the relations between Armenia and the EU varies in line with employment status, geographical affiliation and settlement size. People residing in smaller settlements (fewer than 20,000 inhabitants) tend to have a more positive opinion compared to those from medium-size settlements or the capital (83% vs. 71% and 70% respectively). Also, the share of those who deem relations with the EU to be 'good' is highest among the employed and/or self-employed (80% versus 72% of those who defined themselves as being unemployed or temporarily not working/inactive). Moreover, people from the north and south parts of the country viewed Armenia's relations with the EU more positively than those living in the central regions (82% and 79% vs. 72%, respectively). On average, 12% of Armenian citizens answered, 'don't know' (ranging from 7% to 19% for the different categories).

TABLE 4 – Relations between the EU and Armenia

Q2.4 - In general, how would you describe the relations that the European Union has with Armenia?					
		Good	Bad	Don't know/No relations	Total
Settlement Size	Capital	70%	16%	14%	100%
	Between 20,000 and 150,000 inhabitants	71%	10%	19%	100%
	Less than 20,000 inhabitants	83%	10%	7%	100%
Gender	Male	75%	15%	10%	100%
	Female	77%	10%	13%	100%
Age group	15-34 years	75%	14%	11%	100%
	35-54 years	77%	11%	12%	100%
	55 years & above	75%	11%	14%	100%
Education level	Low-middle level	75%	11%	14%	100%
	High level	78%	15%	7%	100%
Employment status	Employed / Self employed	80%	11%	9%	100%
	Unemployed or temporarily not working / inactive	72%	14%	14%	100%
Geographical area	Centre	72%	15%	13%	100%
	North	82%	7%	11%	100%
	South	79%	9%	12%	100%
Total		76%	12%	12%	100%

Percentages refer to Armenians who have heard about the EU

66% of Armenian citizens know that the EU provides financial support to their country (tab. 5). The proportion of people who are aware of the EU's financial support to Armenia is the lowest among people in the northern part of the country (56%) and highest among those living in southern area (85%). It should also be noted that the level of awareness of EU financial support has decreased compared to 2016 by 14%; and more Armenians think the EU does not provide their country with financial support (8% in 2016 compared to 17% in 2017) or do not know about it (12% in 2016 compared to 17% in 2017). Those with a high level of education (75%), employed and/or self-employed (73%), from the middle-age group (73%), and those from medium size settlements (76%) are more likely to have a better knowledge about the EU's financial support to Armenia than those from other categories.

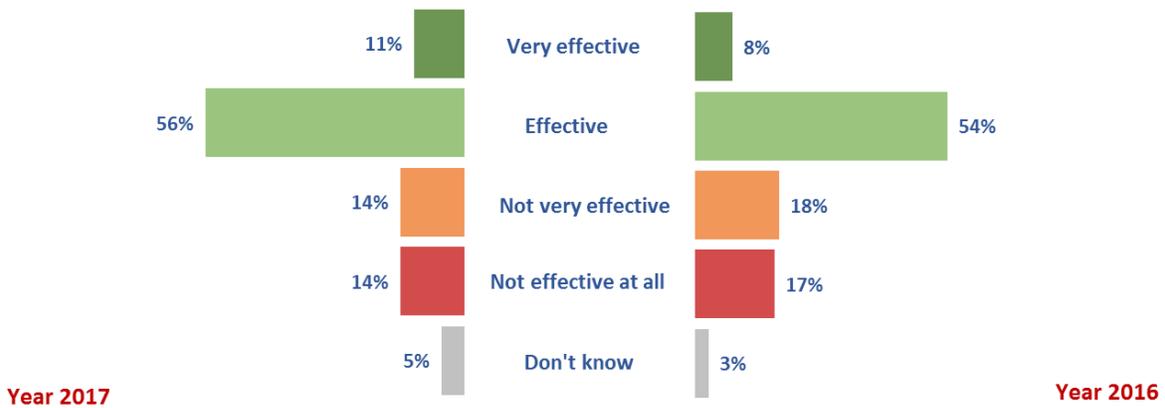
TABLE 5 – Provision of financial support by the EU

Q2.5 - As far as you know, does the European Union provide Armenia with financial support?		Yes	No	Don't know	Total
Settlement Size	Capital	60%	21%	19%	100%
	Between 20,000 and 150,000 inhabitants	76%	8%	16%	100%
	Less than 20,000 inhabitants	67%	17%	16%	100%
Gender	Male	65%	18%	17%	100%
	Female	68%	16%	16%	100%
Age group	15-34 years	64%	17%	19%	100%
	35-54 years	73%	14%	13%	100%
	55 years & above	62%	19%	19%	100%
Education level	Low/middle level	64%	17%	19%	100%
	High level	75%	16%	9%	100%
Employment status	Employed / Self employed	73%	16%	11%	100%
	Unemployed or temporarily not working / inactive	61%	17%	22%	100%
Geographical area	Centre	62%	19%	19%	100%
	North	56%	23%	21%	100%
	South	85%	5%	10%	100%
Total		66%	17%	17%	100%

Percentages refer to Armenians who have heard about the EU

As shown in the figure below (fig. 5), the share of people believing financial support from the EU to Armenia to be effective has increased from 62% to 67% since 2016. 7% fewer people in 2017 assess the financial support from the EU to Armenia negatively.

FIGURE 5 – How effective do you think the support has been? (Q2.5.1)



Percentages refer to Armenians who were aware of the EU's financial support

The highest percentages of people who believe the financial support provided by the EU has been effective are among women (71%) and those living in the southern part of the country (80%) (tab. 6). The groups most sceptical about the effectiveness of EU support are people with a high level of education (31%), men (33%) and those living in the central part of the country (32%). Analysis of the effectiveness of the EU's financial support to Armenia by settlement size, age groups and employment status did not reveal any notable differences.

TABLE 6 – Effectiveness of the support

Q2.5.1 - How effective do you think the support has been?					
		Effective	Not effective	Don't know	Total
Settlement Size	Capital	64%	30%	6%	100%
	Between 20,000 and 150,000 inhabitants	68%	28%	4%	100%
	Less than 20,000 inhabitants	69%	25%	6%	100%
Gender	Male	62%	33%	5%	100%
	Female	71%	23%	6%	100%
Age group	15-34 years	69%	26%	5%	100%
	35-54 years	66%	29%	5%	100%
	55 years & above	67%	28%	5%	100%
Education level	Low/middle level	68%	26%	6%	100%
	High level	64%	31%	5%	100%
Employment status	Employed / Self employed	67%	27%	6%	100%
	Unemployed or temporarily not working / inactive	68%	27%	5%	100%
Geographical area	Centre	61%	32%	7%	100%
	North	65%	29%	6%	100%
	South	80%	17%	3%	100%
Total		67%	28%	5%	100%

Percentages refer to Armenians who were aware of the EU's financial support

Only one third of Armenian citizens who are aware of the EU's financial support to Armenia know about specific EU-funded programmes (tab. 7). Education level, age, employment status and size of settlement seem to be more closely linked to this kind of information. Older people (78%), individuals with low/middle level of education (73%), those residing in medium or small-size settlements (72% for both) and unemployed/temporarily not working/inactive citizens (72%) appear to be the least informed about specific programmes in comparison to younger people, employed citizens, highly educated population and individuals living in the capital. Analysis by gender and geographical area did not reveal any notable differences in this regard.

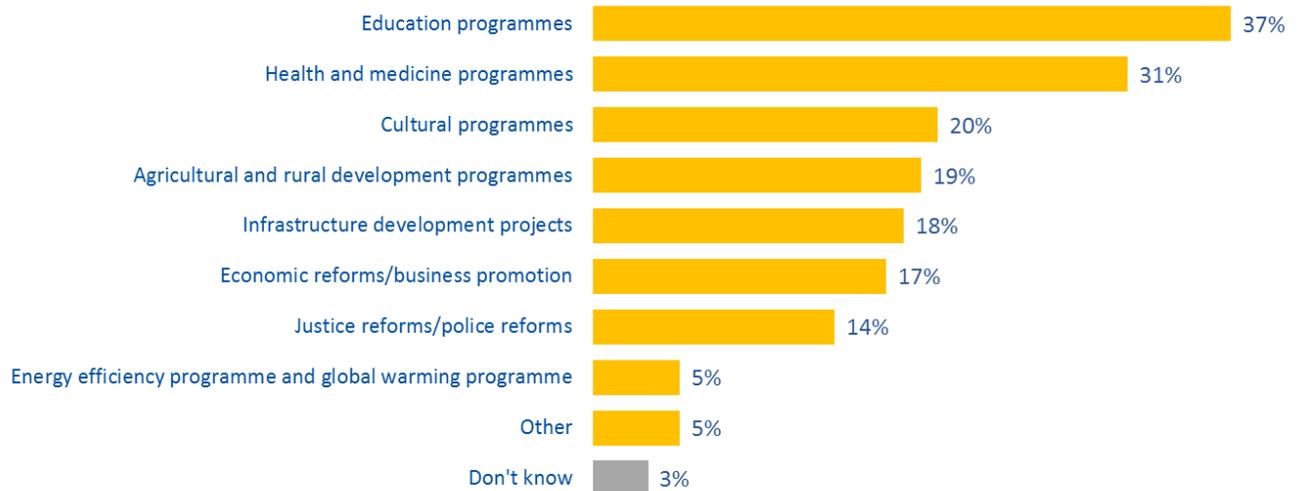
TABLE 7 – Programmes financed by the EU

Q2.6 - Do you know of any specific programmes financed by the European Union in Armenia?					
		Yes	No	Total	
Settlement Size	Capital	39%	61%	100%	
	Between 20,000 and 150,000 inhabitants	28%	72%	100%	
	Less than 20,000 inhabitants	28%	72%	100%	
Gender	Male	32%	68%	100%	
	Female	32%	68%	100%	
Age group	15-34 years	36%	64%	100%	
	35-54 years	33%	67%	100%	
	55 years & above	22%	78%	100%	
Education level	Low/middle level	27%	73%	100%	
	High level	46%	54%	100%	
Employment status	Employed / Self employed	36%	64%	100%	
	Unemployed or temporarily not working / inactive	28%	72%	100%	
Geographical area	Centre	33%	67%	100%	
	North	30%	70%	100%	
	South	31%	69%	100%	
Total		32%	68%	100%	

Percentages refer to Armenians who were aware of the EU's financial support

The most well-known EU-funded programmes in Armenia are educational programmes (37%), followed by health and medicine programmes (31%) (fig. 6). A smaller proportion of Armenians are aware of programmes in the fields of culture (20%), agricultural and rural development (19%), infrastructure development (18%), economic reforms/business promotions (17%) and justice reforms/police reforms (14%). Only 7% of Armenians reported that they have personally been involved or know someone who has been involved in recent EU-funded projects.

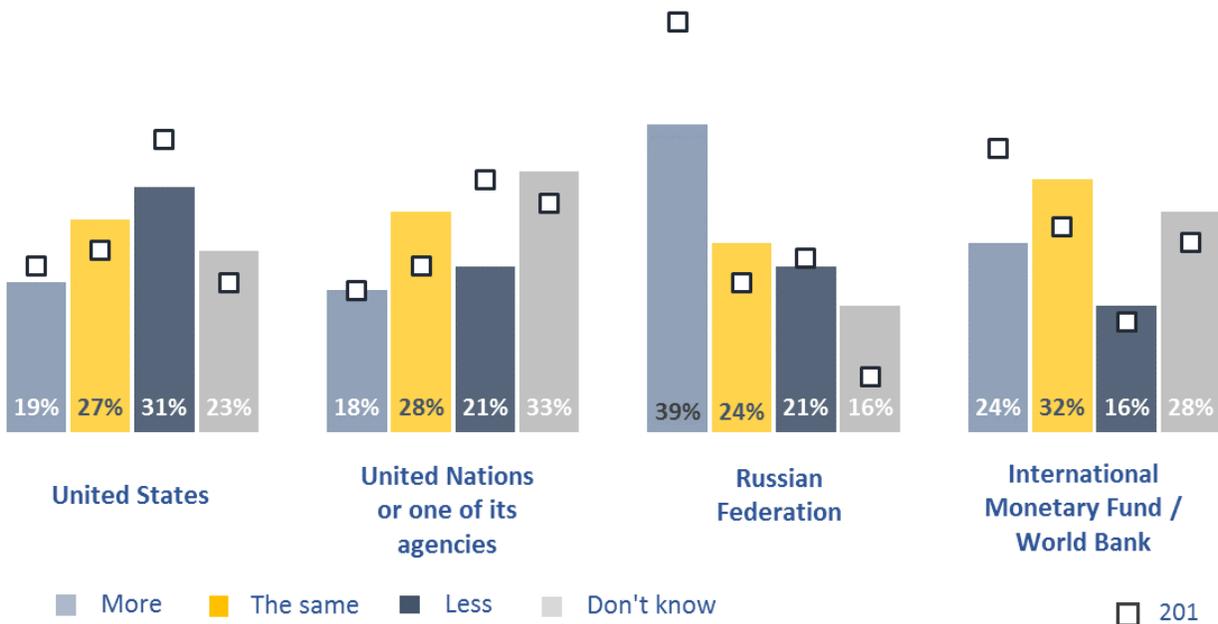
FIGURE 6 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)



Percentages refer to Armenians who were aware of the EU's financial support

On average, a quarter of the Armenian population does not have enough information to compare the support provided by the EU to that provided by other institutions, such as the International Monetary Fund (IMF)/World Bank (WB), the United States of America, the United Nations and its agencies, and the Russian Federation (the share is ranging from 16% to 33% for different institutions). Nearly 40% of Armenian citizens believe that the Russian Federation provides more financial support to their country than the European Union (fig. 7). A quarter of the population thinks the IMF/WB provides more financial support to their country than the EU. It should be highlighted that the proportion of individuals who believe that the Russian Federation and IMF/WB are the major donors to Armenia compared to the EU has considerably decreased since 2016. The greatest proportion of “don’t knows” comes in response to funding from the UN and its agencies, with 33% saying they do not have enough information to make the comparison between the institutions. Less than one fifth of the population thinks that financial support provided from the USA and/or the UN or its agencies is greater than that provided by the EU. The share of those who had no definite opinion about this issue has increased since 2016.

FIGURE 7 – As far as you know, for each of the following international institutions, would you say that it provides more, the same, or less financial support to your country than the European Union? (Q2.7)



Percentages refer to Armenians who have heard about the EU

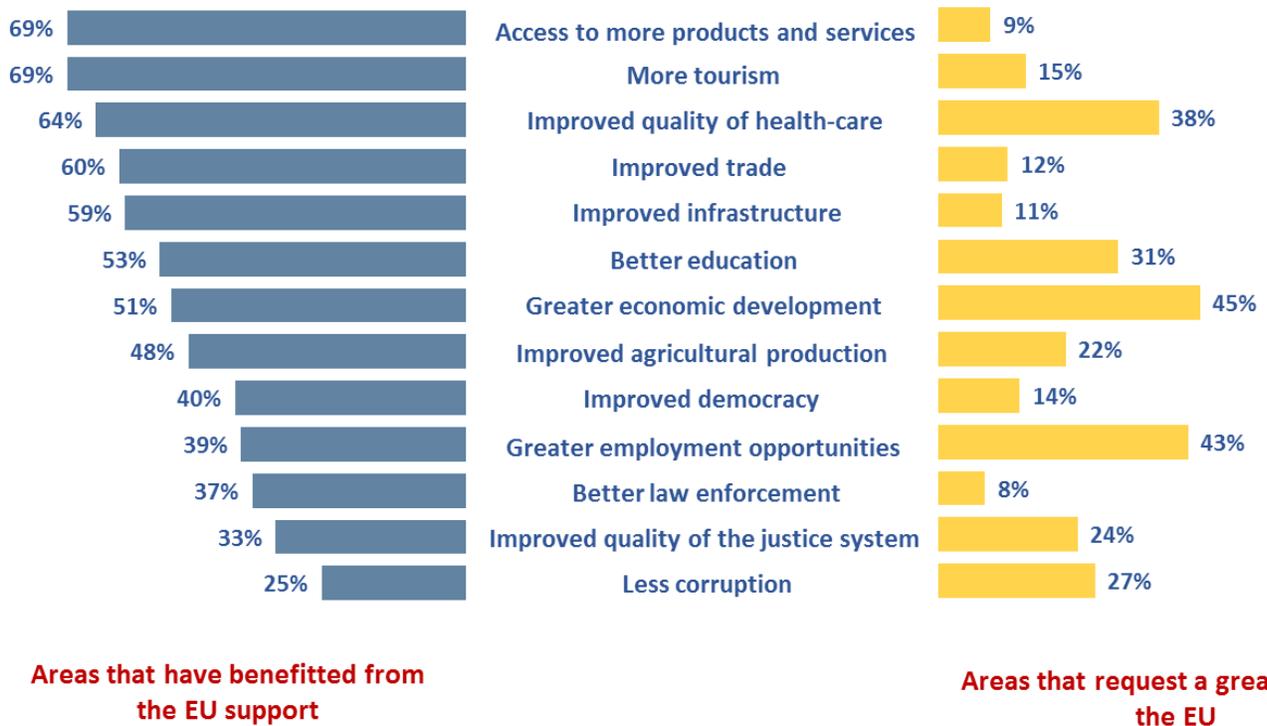
However, most Armenians still believe that their country has fairly, and to a lesser extent, very much benefitted from the EU's support (fig. 8).⁷ The main benefits cited include increased access to more products and services (69%), an increase in tourism (69%), improved quality of healthcare (64%), improved trade (60%) and infrastructure (59%), better education (53%) and greater economic development (51%). The list continues with improved agricultural production (48%) and improved democracy (40%). Employment, law enforcement, justice system and corruption are the areas of least awareness – only 39%, 36%, 32% and 25% of people respectively acknowledge some benefit from the EU's support in these areas.

The areas where Armenian citizens feel that they have benefitted less from EU support are also those where people believe the EU should play a greater role, as shown in the figure below (fig. 8). Almost half of the population (45%) believes that the EU should play a greater role in economic development, followed by facilitating greater employment opportunities (43%)⁸.

⁷ More details are provided in Annex, Table A1.

⁸ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role. See Appendix Table A2 for more details.

FIGURE 8 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas that request a greater role of the EU (Q2.9)



Percentages refer to Armenians who have heard about the EU

3.2.3. Attitudes towards the EU: a snapshot

In this section, the attitude of Armenians towards the EU has been analysed according to two main profiles: individuals that who have a positive attitude towards the EU and those who are mostly neutral.⁹ Four indicators were considered: level of trust, relationship between Armenia and the EU, awareness of EU financial support, and effectiveness of EU support.

The first thing to be noted is that, unsurprisingly, individuals who have a positive image of the EU are also more likely to be more positively oriented for all four indicators compared to the neutral population (fig. 9).¹⁰ More than 80% of those who have a positive attitude also tend to trust the EU, compared to 55% of those who are mostly neutral. A difference of around 10% to 17% between positively and neutrally oriented people was recorded for the other three indicators.

⁹ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

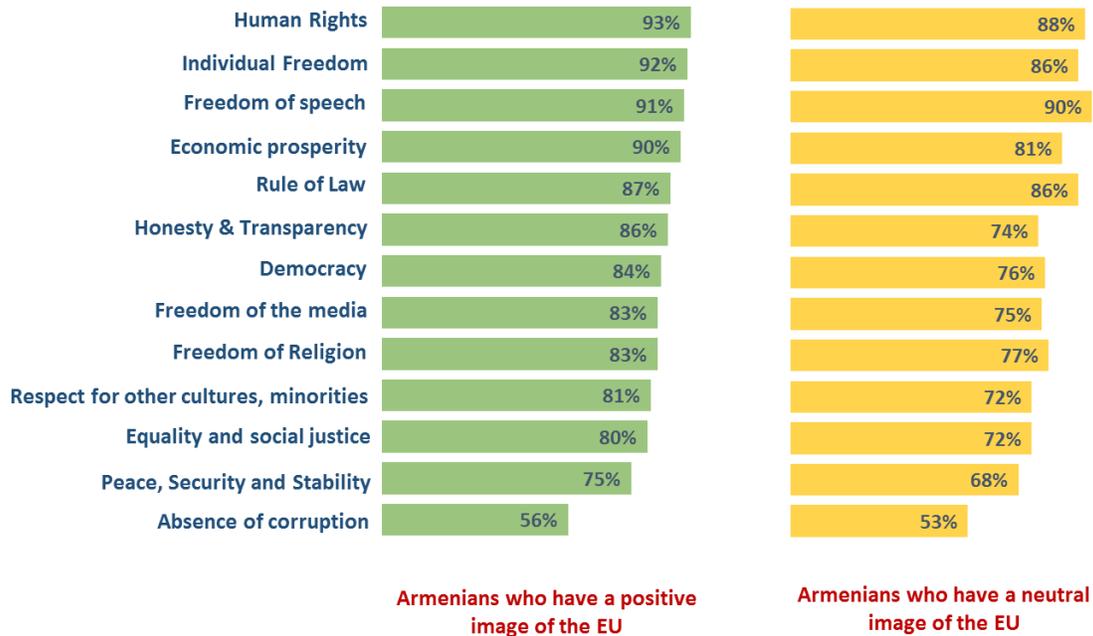
¹⁰ More details are provided in Annex, Table A3.

FIGURE 9 – Attitudes towards the EU: positive versus neutral



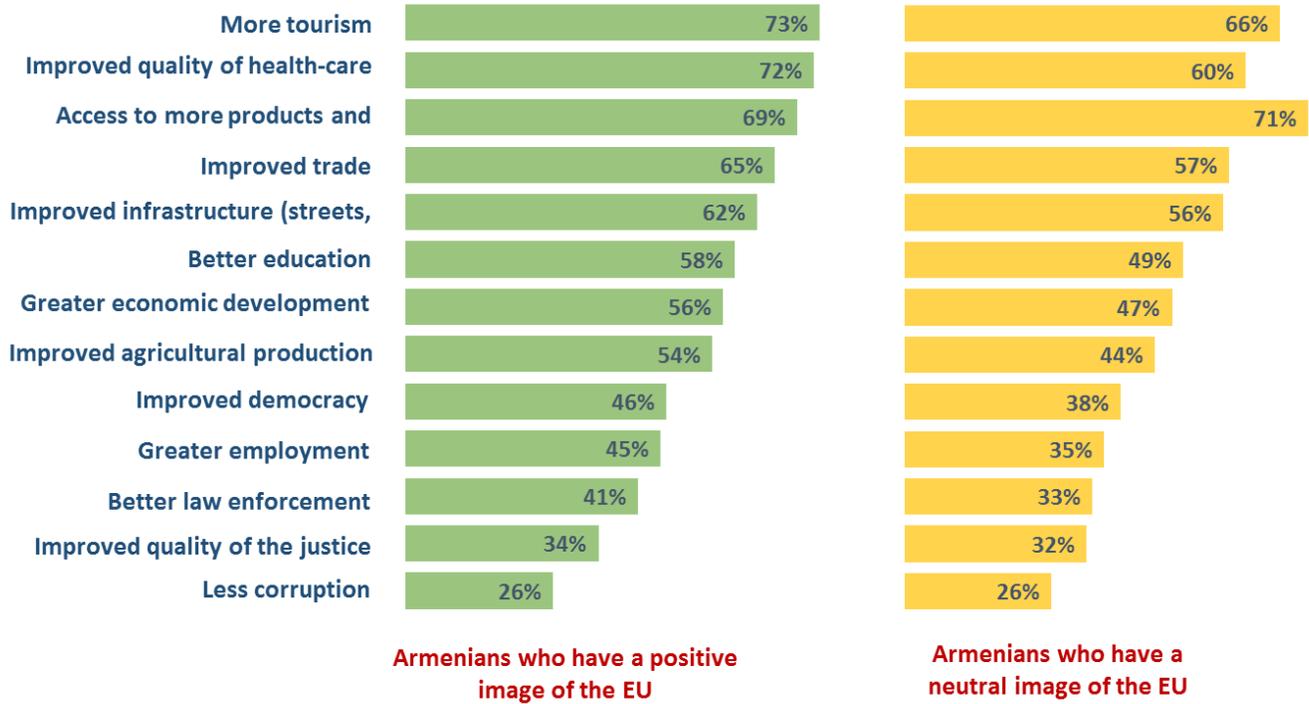
The top three values, which Armenians with a positive image of the EU link strongly and very strongly with the European Union are human rights (93%), individual freedom (92%) and freedom of speech (91%) followed by economic prosperity (90%), rule of law (87%), honesty and transparency (86%), democracy (84%), freedom of media and religion (83%) (fig. 10). Neutrally oriented citizens associate the same values with the EU as those with a positive image, but to a slightly lesser extent.

FIGURE 10 – Values strongly associated with the EU – positive versus neutral



Similarly, those with positive attitudes towards the EU see more benefits for Armenia from the EU than neutrally oriented individuals except for access to products and services (neutral are 71% and positive 69%) and less corruption (both 26%). As shown in figure 11, both positively and neutrally oriented individuals believe that the European Union has very much or fairly-much encouraged tourism, improved the quality of the healthcare system and increased access to more products and services. More than 60% of those who have a positive image of the EU also cited improved infrastructure (62%) and trade (65%), while 71% of those with a neutral image also referred to increased access to more products and services. Law enforcement, quality of justice and corruption were the least mentioned benefits by both populations: still, between a quarter to 40% of both groups mentioned these benefits.

FIGURE 11 – Areas that have very much or fairly benefited from EU support: positive versus neutral

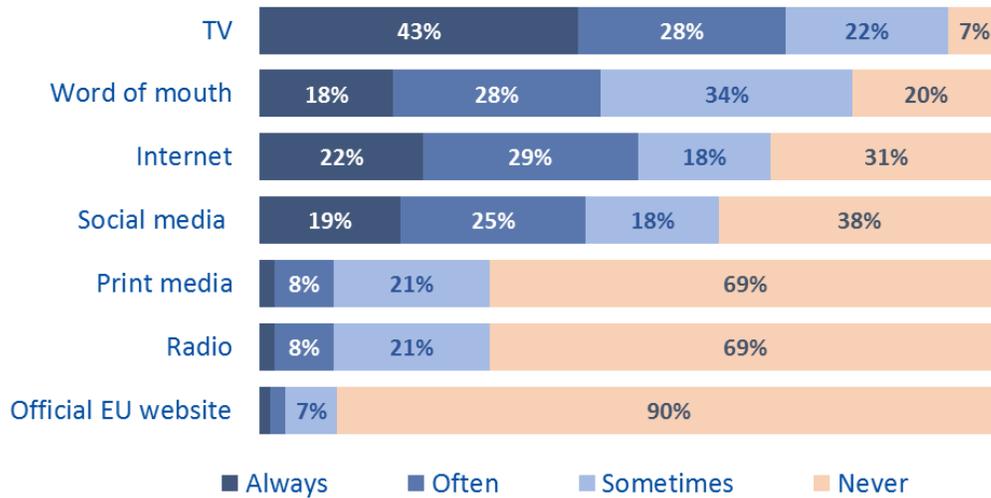


3.3. Sources of information on the EU

3.3.1. Media usage as sources of information

Television is the most popular media channel in Armenia – 43% of Armenians always watch television, 28% often and 22% sometimes (fig. 12). The next most commonly used source of information is word of mouth (80% of the population). The internet (69%) and social media (used by 62% in total) also appear to be popular sources of information among the population. The least utilized sources of information in Armenia are the print media and radio and the official EU website: these sources were never used by 69%, 69% and 90% of the population respectively.

FIGURE 12 – Type of media used as a source of information (Q3.7)



Overall, individuals who do not frequently use any of the above-mentioned media account for 15% of the population; while one third of Armenian citizens frequently use only traditional media and more than half is regularly active on social media and the internet¹¹ (tab. 8). Word of mouth is used as a source of information by 46%. People who use only traditional media tend to be above 55 years old (67%) and those who use social media or the internet are drawn from the younger generation (79%) and individuals with a high level of education (80%).

¹¹ The first group includes all individuals who do not “always or often” use any of the surveyed media; the second group includes all individuals who “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals who always or often use either internet (including the official EU web site) or the social media.

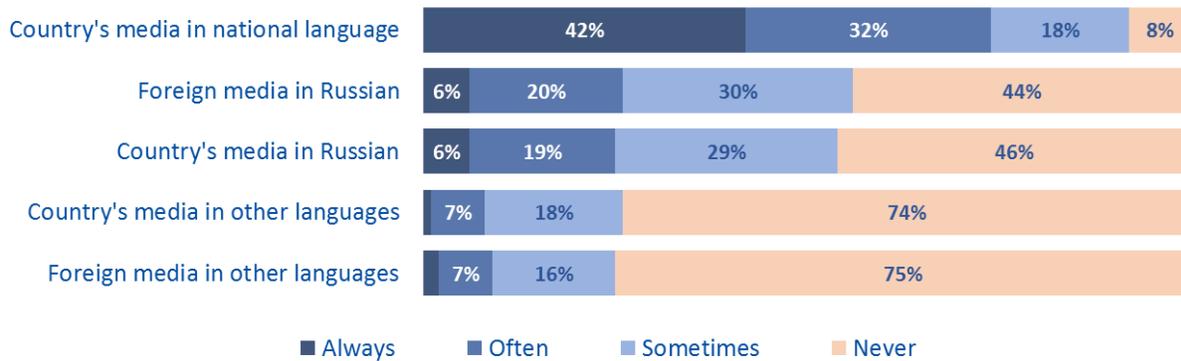
TABLE 8 – Type of media frequently used as source of information

		Type of media frequently used as source of information (Q3.8)				Word of mouth used as source of information (Q3.8)
		No media	Only traditional media	Social media or internet	Total	
Settlement size	Capital	9%	29%	62%	100%	41%
	Between 20,000 and 150,000 inhabitants	22%	27%	51%	100%	40%
	Less than 20,000 inhabitants	17%	34%	49%	100%	53%
Gender	Male	15%	28%	57%	100%	47%
	Female	14%	34%	52%	100%	45%
Age group	15-34 years	12%	9%	79%	100%	45%
	35-54 years	15%	30%	55%	100%	54%
	55 years & above	19%	67%	14%	100%	38%
Education level	Low/middle level	16%	36%	48%	100%	44%
	High level	8%	12%	80%	100%	55%
Employment status	Employed/ Self-employed	14%	22%	64%	100%	52%
	Unemployed or temporarily not working / inactive	15%	39%	46%	100%	41%
Geographical area	Centre	9%	31%	60%	100%	45%
	North	18%	36%	46%	100%	56%
	South	25%	27%	48%	100%	40%
Total		15%	31%	54%	100%	46%

The majority of Armenians (42% always, 32% often and 18% sometimes) rely on media in the national language (fig. 13).

The usage of foreign or national media in Russian is also quite prevalent – more than half of Armenian citizens use Russian language media. As for the usage of other language media, it is relatively rare in Armenia (used by one quarter of the population)

FIGURE 13 – Usage of media in Armenian, Russian and other languages (Q3.7)



In the table below, the socio-demographic characteristics of the population have been analysed according to three main profiles – individuals who frequently use media in national language (74%), individuals who mostly use media in Russian (36%) and those who rely on media in foreign languages (13%)¹².

In general, media in the national language is the most popular information source for all target groups, although Russian language media is more widespread among people with higher education (53%), middle age group (41%), employed (40%) and females (38%).

TABLE 9 – Frequent usage of media in Armenian, Russian and other languages

		Individuals that always or often use media		
		In national language	In Russian	In other foreign language
Settlement Size	Capital	84%	39%	13%
	Between 20,000 and 150,000 inhabitants	56%	37%	16%
	Less than 20,000 inhabitants	72%	34%	11%
Gender	Male	76%	33%	11%
	Female	72%	38%	14%
Age group	15-34 years	69%	34%	16%
	35-54 years	77%	41%	12%
	55 years & above	77%	33%	8%
Education level	Low/middle level	73%	32%	10%
	High level	76%	53%	24%
Employment status	Employed / Self-employed	76%	40%	15%
	Unemployed or temporarily not working / inactive	72%	33%	11%
Geographical area	Centre	81%	38%	12%
	East	63%	37%	12%
	West	64%	31%	15%
Total		74%	36%	13%

Trust levels towards different media sources are similar to the usage patterns: the majority of people trust the country’s media in Armenian (63%), followed by Russian language media (46% and 42% for local and foreign media respectively) (tab. A4 in Annex section).

Television, internet and word of mouth are the most trusted sources of information in Armenia (61%, 52% and 49% respectively). 60% of people do not know how much to trust the official EU website, not surprising given that 90% never use it.

¹² The first group includes all individuals who “always or often” use media in Armenian; the second group includes all individuals who “always or often” use the country’s or foreign media in Russian; while the last group includes all individuals who “always or often” use the country’s or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

3.3.2. Sources of information about the EU

Less than one third of Armenians claimed to have heard about the European Union in the last three months as opposed to 51% in 2016. A larger proportion of people among highly educated citizens (38%), employed/self-employed individuals (32%) and middle age group (32%) seem to have seen/heard about the EU in the last three months compared to those with low/middle level education (26%), unemployed/inactive (26%) and youngsters and/or the elderly (27% for both). More people from the central and northern part of Armenia reported receiving information about the EU in the last three months compared to those residing in southern part of the country (one third vs. one quarter respectively) (tab. 10). Analysis by gender did not reveal any notable differences across the groups in this regard.

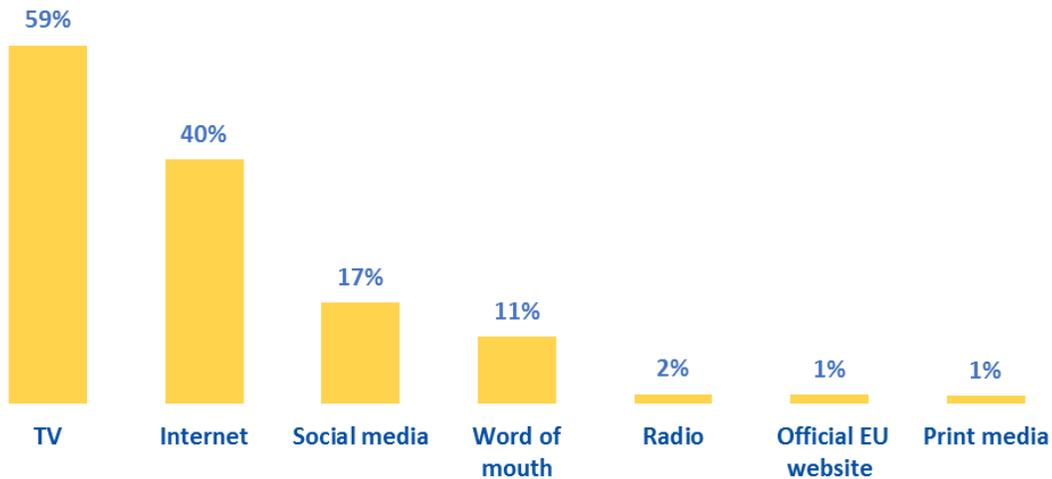
TABLE 10 – Exposure to information about the EU

Q3.2 - Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
Settlement Size	Capital	31%	69%	100%
	Between 20,000 and 150,000 inhabitants	27%	73%	100%
	Less than 20,000 inhabitants	28%	72%	100%
Gender	Male	29%	71%	100%
	Female	29%	71%	100%
Age group	15-34 years	27%	73%	100%
	35-54 years	32%	68%	100%
	55 years & above	27%	73%	100%
Education level	Low/middle level	26%	74%	100%
	High level	38%	62%	100%
Employment status	Employed / Self employed	32%	68%	100%
	Unemployed or temporarily not working / inactive	26%	74%	100%
Geographical area	Centre	30%	70%	100%
	North	32%	68%	100%
	South	24%	76%	100%
Total		29%	71%	100%

Percentages refer to Armenians who have heard about the EU

Most of the information recently obtained by people came from television (59%). 40% of Armenians have heard or seen information about the EU through the internet, 17% through social media and 11% from word of mouth. Radio, printed press and the official EU website accounted for less than 2% of the overall population.

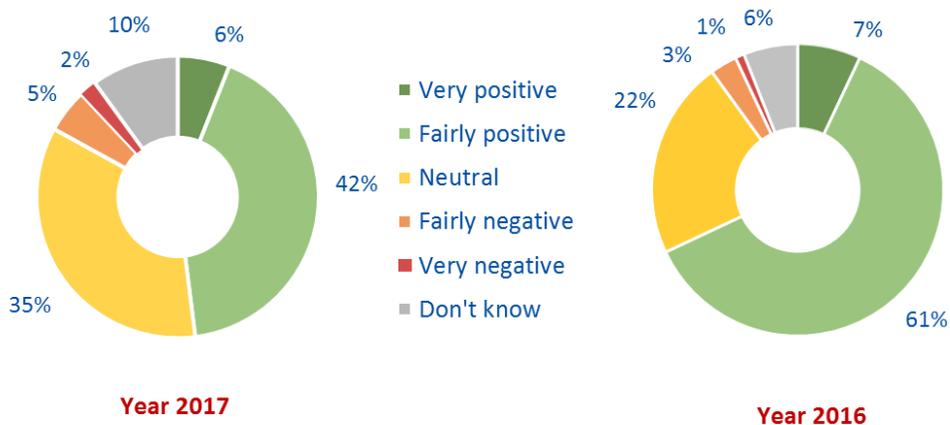
FIGURE 14 – Where or from whom you have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)



Percentages refer to Armenians who have heard any information about the EU in the last three months

When asked to evaluate the image of the EU in the national media, nearly half of the Armenian population (48%) felt that the national media represented the European Union very positively (6%) or fairly-positively (42%). The share of people who evaluated the presentation of the EU in the national media positively was down 20 points compared to last year 2017 (fig. 15). The shift has been from positive representation of the EU in the national media towards the neutral – 35% of Armenians think that the EU is neutrally represented in the national media compared to 22% in 2016.

FIGURE 15 – In general, how would you say the EU was presented in the national media? (Q3.3)



Percentages refer to Armenians who have heard about the EU

Those who believe that the EU is positively represented in the national media usually come from the capital (54%) and the central part of the country (52%), represent the middle and younger age groups (53% and 49%, respectively) and are highly educated (57%) (tab. 11). Inhabitants of the central and southern parts of the country (52% and 48%, respectively) are also more positively oriented while those residing in medium cities are less aware about these issues compared to others (17%).

TABLE 11 – Representation of the EU in the national media

Q3.3 - In general how would you say the EU was presented in the national media?

		Positive	Neutral	Negative	Don't know	Total
Settlement Size	Capital	54%	32%	5%	9%	100%
	Between 20,000 and 150,000 inhabitants	37%	37%	9%	17%	100%
	Less than 20,000 inhabitants	49%	36%	6%	9%	100%
Gender	Male	47%	34%	8%	11%	100%
	Female	50%	35%	5%	10%	100%
Age group	15-34 years	49%	32%	7%	12%	100%
	35-54 years	53%	35%	6%	6%	100%
	55 years & above	41%	38%	6%	15%	100%
Education level	Low/middle level	46%	35%	6%	13%	100%
	High level	57%	32%	7%	4%	100%
Employment status	Employed / Self employed	48%	38%	6%	8%	100%
	Unemployed or temporarily not working / inactive	49%	32%	7%	12%	100%
Geographical area	Centre	52%	33%	6%	9%	100%
	North	40%	40%	6%	14%	100%
	South	48%	35%	6%	11%	100%
Total		48%	35%	7%	10%	100%

Percentages refer to Armenians who have heard about the EU

According to 57% of the population, the information which they read, watch or access online helps them to have a better understanding of the European Union. 20% of people disagree with this notion and think that the information does not (not very or not at all) help them better to understand the EU.

The following section looks specifically at sources of information about the EU, and therefore only refers to Armenians who actively look for/access information on the EU.

Information on the European Union is accessed frequently or very frequently by 14% of the population, not very frequently by less than one third, and never accessed by more than half of Armenian citizens (56%) (fig. 16). The proportion of people who frequently or very frequently looked for this kind of information is comparable with last year's findings. However, the share of people who never searched for EU-related information showed a slight increase since last year (50% in 2016 vs. 57% in 2017). The proportion of those who reported accessing EU-related information not very frequently has decreased by 9 percentage points since 2016.

FIGURE 16 – How often do you look for/access information on the EU? (Q3.1)



Percentages refer to Armenians who have heard about the EU

The highest share of individuals who never look for information on the EU can be found among people aged 55 and above (69%), those with low/middle level of education (61%) and those residing in the northern part of the country (66%). Highly educated people (59%) tend to access information on the EU more frequently compared to those with lower levels of education (39%) (tab. 12). Analysis by settlement size, gender and employment status did not reveal any notable differences across the groups.

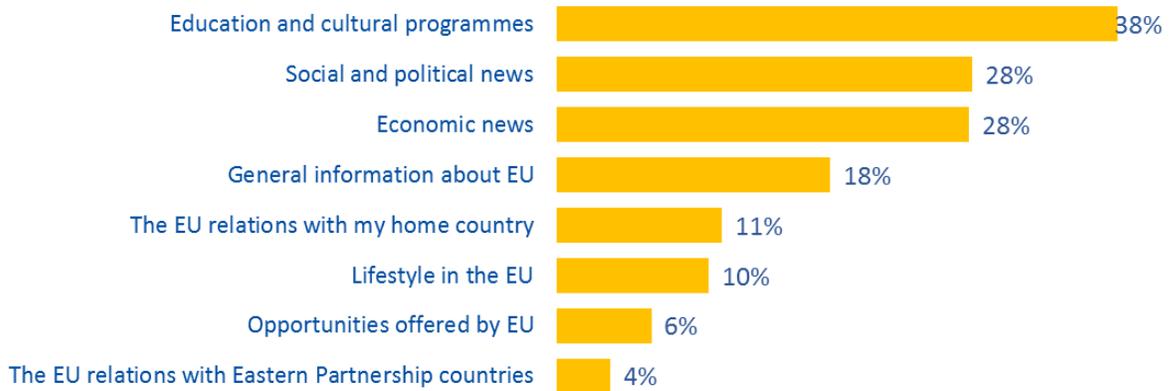
TABLE 12 – Accessing information about the EU

Q3.1new - How often do you look for/ access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement Size	Capital	15%	32%	53%	100%
	Between 20,000 and 150,000 inhabitants	14%	30%	56%	100%
	Less than 20,000 inhabitants	13%	27%	60%	100%
Gender	Male	12%	29%	59%	100%
	Female	16%	30%	54%	100%
Age group	15-34 years	17%	30%	53%	100%
	35-54 years	13%	34%	53%	100%
	55 years & above	9%	22%	69%	100%
Education level	Low/middle level	13%	26%	61%	100%
	High level	17%	42%	41%	100%
Employment status	Employed / Self employed	16%	30%	54%	100%
	Unemployed or temporarily not working / inactive	12%	29%	59%	100%
Geographical area	Centre	14%	31%	55%	100%
	North	16%	18%	66%	100%
	South	11%	36%	53%	100%
Total		14%	30%	56%	100%

Percentages refer to Armenians who have heard about the EU

Most people, who search for information about the EU, access information in their national language (66%), while 21% do so in Russian and 13% in English. The most commonly searched information concerns education and cultural programmes (38%), while 28% search for information about social, political and economic news (fig. 17). 18% look for general information about the EU and only 11% want to know more about EU relations with Armenia. Every tenth Armenian searching for information about the EU is looking for lifestyle in the EU. It should be noted that the least demanded information about the EU relates to the opportunities offered by the EU (6%) and EU relations with Eastern Partnership countries (4%).

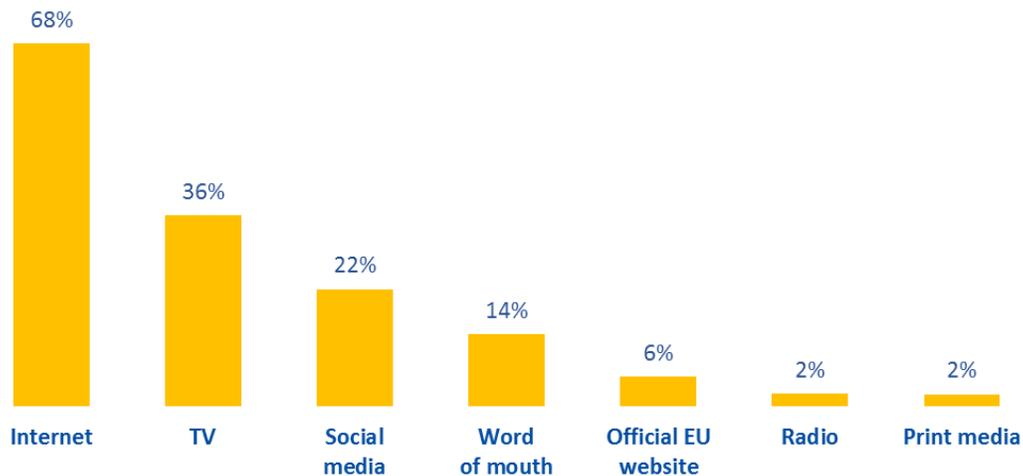
FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)



Percentages refer to Armenians who have looked for/accessed information on the EU

While passive exposure to information about the EU mostly stems from television (59%) and the internet (40%) and to a lesser extent from social media (17%) and word of mouth (11%), those actively searching/accessing information rely mostly on the internet (68%) followed by TV (36%) and social media (22%) (fig. 18). 14% of Armenians find the information they need through word of mouth; only 6% visit the official EU website and 4% overall read print media or listen to the radio.

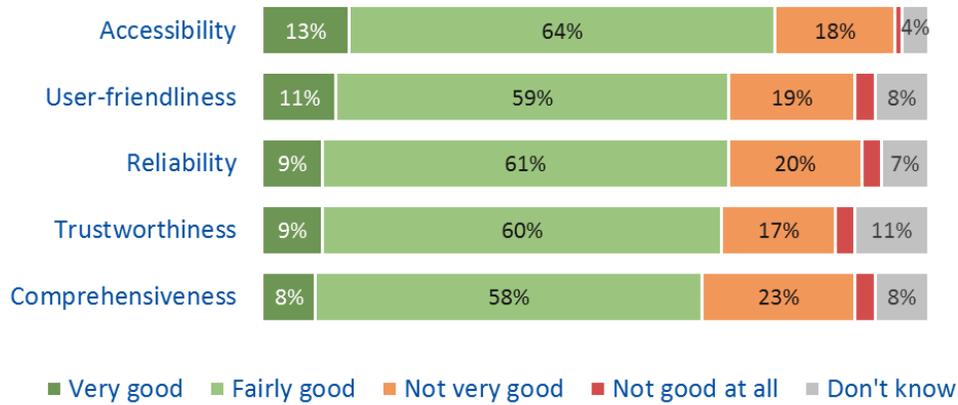
FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)



Percentages refer to Armenians who have looked for/accessed information on the EU

Most people in Armenia that search for information about the EU rate the information as being accessible (very – 13%; fairly – 64%) (fig. 19). They also think of the information as user-friendly (70%), comprehensive (66%), reliable (70%) and trustworthy (69%).

FIGURE 19 – How would you rate the information in terms of...? (Q3.1.5)



Percentages refer to Armenians who have looked for/accessed information on the EU

Finally, 12% of Armenians have used EU information websites¹³ at least once. The Facebook profile of the European Union is the most visited EU website (10% of the population), followed by the EU institutions’ websites (6%). The rest of the EU pages are only seen by 1%-3% of the target audience.

3.3.3. Sources of information and attitude towards the EU

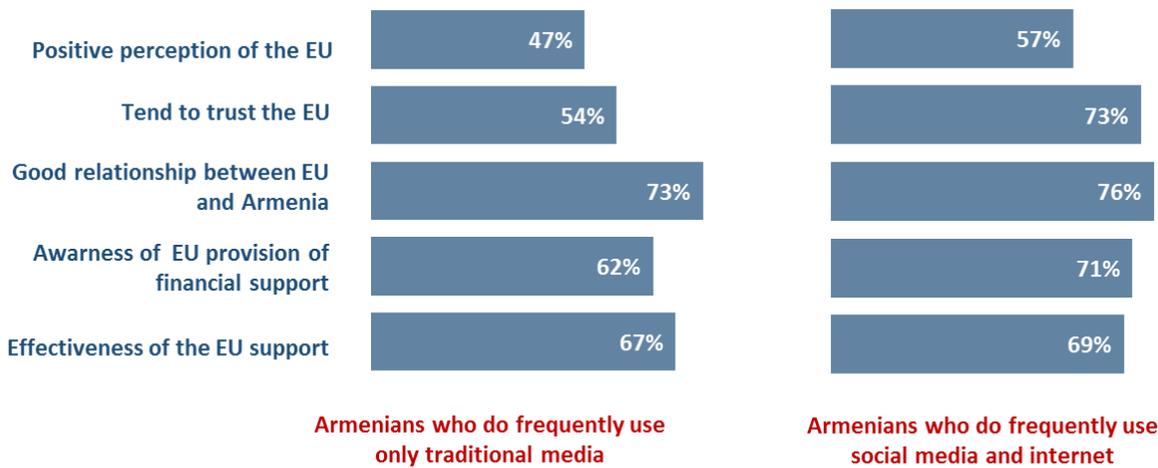
As in section 3.3.1, Armenians’ attitudes towards the EU have been analysed according to two main profiles –individuals who frequently rely on traditional media, and those who are regularly active on social media and the internet. Individuals using word of mouth as a source of information have been assessed separately and figures for them are presented in Annex - Table A5.

Around three-quarters of Armenians acknowledge the good relationship between their country and the EU and the effectiveness of the EU support, regardless of what kind of media source they use more frequently (73% among traditional media users and 76% among digital media users believe that there are good relationships between the EU and Armenia; 67% among traditional media users and 69% among digital media users are positive about the effectiveness of the financial support). Social media and internet users, on the other hand, are more likely to trust the EU (73%), to have positive image of the EU (57%) and be aware of the EU support (71%) compared to traditional media users (54%, 47%, 62% respectively)¹⁴.

¹³ EU institutions’ websites; EU Delegation website; EU projects’ website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

¹⁴ More details are provided in Annex, Table A5.

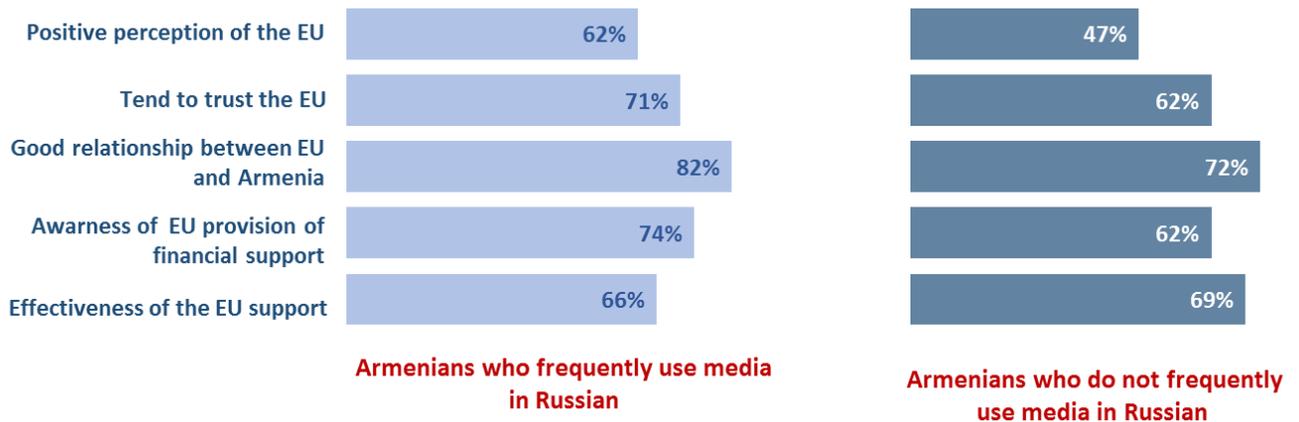
FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU



Percentages refer to Armenians who have heard about the EU

Attitudes towards the EU have also been assessed by comparing the people who frequently use media in Russian against those who do not (fig. 21).¹⁵ The majority of people, regardless of whether they frequently access media in Russian or not, tend to assess the relationship between Armenia and the EU positively (82% among Russian media users and 72% among non-Russian media users). People who frequently use media in Russian tend to have a more positive perception of the European Union (62%), to trust it (71%) and be aware of the EU’s financial support to Armenia (74%), compared to those who do not frequently use Russian language media (47%, 62% and 62% respectively).

FIGURE 21 – Frequent usage of media in Russian and attitude towards the EU



Percentages refer to Armenians who have heard about the EU

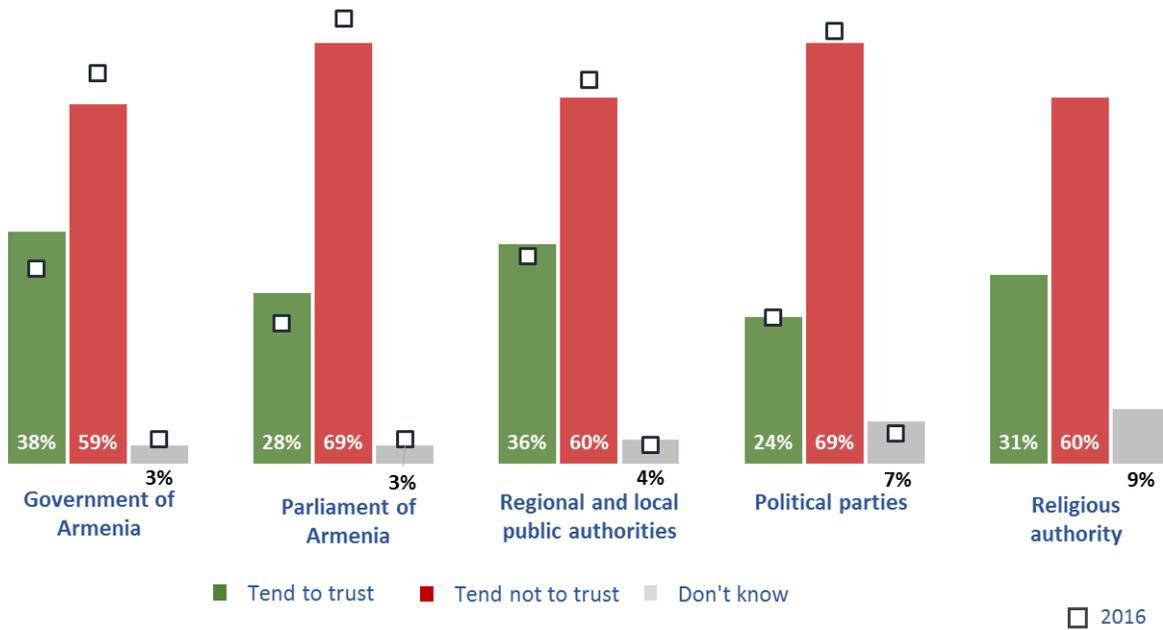
¹⁵ More details are provided in Annex, Table A6.

3.4. View of Armenia’s current situation and future expectations

3.4.1. View of Armenia’s current situation

Just as in 2016, Armenians do not have a great deal of trust in national, regional and local institutions, although the share of individuals who trust the institutions seems to have slightly increased compared to last year: 38% currently trust the Government compared to 32% in 2016; 28% trust parliament against 23% in 2016, and about one in three Armenians (36%) trust regional and local public authorities. There seems to have been a slight shift from distrust towards trust, and figures related to no opinion are almost the same or have decreased for most of the listed indicators. Political parties, on the other hand, still score the lowest levels of trust (24%) among the Armenian population as was observed in 2016. Trust towards the religious authority, a new variable included in the survey in 2017, is also low – only one in three Armenians trust religious authorities against 60% who do not.

FIGURE 22 – Please tell us your level of trust for the following institutions (Q4.1)



When it comes to the current situation in terms of democracy, Armenians’ views remain the same as in 2016 – 70% of them are still dissatisfied with the way democracy works in the country (71% in 2016).

FIGURE 23 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Armenia? (Q4.3)



The data show some interesting differences in terms of level of satisfaction with the way democracy works in Armenia. Dissatisfaction is higher among the inhabitants of the capital and those with higher education (76%-76% respectively), while individuals living in the northern parts of the Armenia appear to be more satisfied with democracy in their homeland (36% against 22% in other parts of the country) (tab. 13).

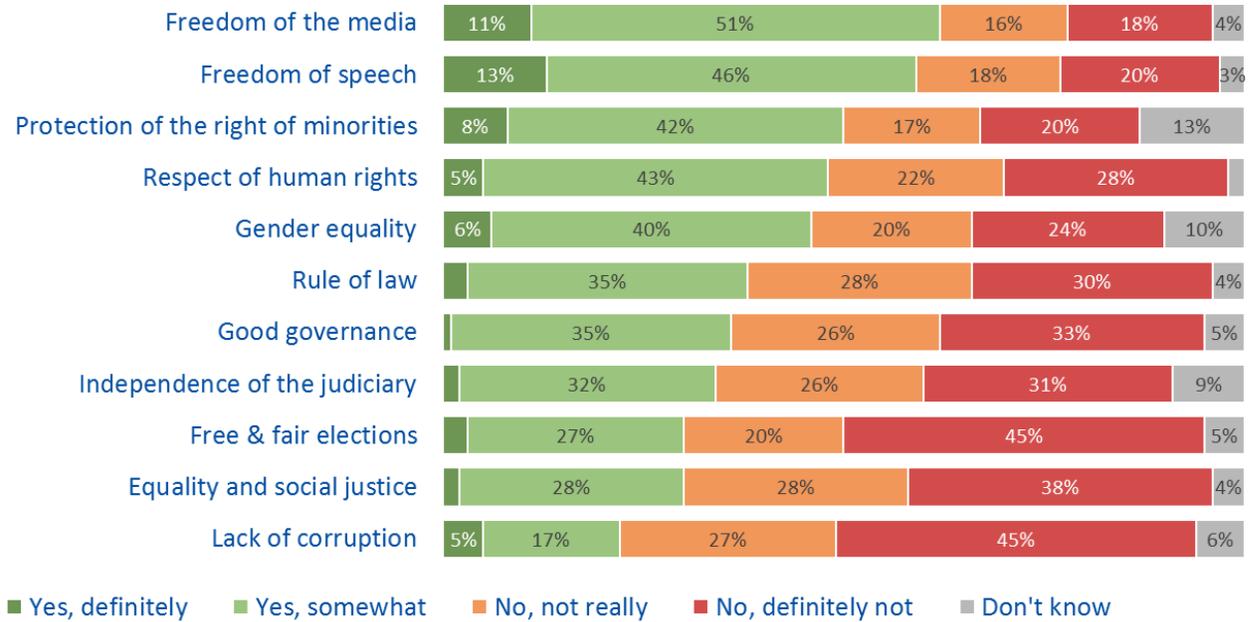
TABLE 13 – Satisfaction with democracy in Armenia

Q4.3 - On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Armenia?

		Satisfied	Not satisfied	Don't know	Total
Settlement Size	Capital	21%	76%	3%	100%
	Between 20,000 and 150,000 inhabitants	21%	69%	10%	100%
	Less than 20,000 inhabitants	29%	66%	5%	100%
Gender	Male	26%	69%	5%	100%
	Female	24%	71%	5%	100%
Age group	15-34 years	26%	69%	5%	100%
	35-54 years	23%	73%	4%	100%
	55 years & above	26%	69%	5%	100%
Education level	Low/middle level	26%	69%	5%	100%
	High level	22%	76%	2%	100%
Employment status	Employed / Self employed	25%	71%	4%	100%
	Unemployed or temporarily not working / inactive	25%	69%	6%	100%
Geographical area	Centre	22%	74%	4%	100%
	North	36%	59%	5%	100%
	South	22%	70%	8%	100%
Total		25%	70%	5%	100%

A majority of Armenians believe that freedom of media (62%) and freedom of speech (59%) are ensured in their country (fig. 24), although these indicators are down compared to 2016 (freedom of the media 74%; freedom of speech: 67%). The same applies to the protection of the rights of minorities, which is considered to apply in the country by every second Armenian (50%), down from 67% last year. Lack of corruption, equality and social justice and free and fair elections were assessed as the most problematic issues by most Armenians (72%, 66% and 65% respectively), though less so for corruption and free and fair elections than in 2016 (82% and 80% respectively). It should be noted that the indicators which are most problematic for Armenians to assess are related to protection of minority rights, gender equality and independence of judiciary – 13%, 10% and 9% of population responded with “don’t know” when asked to assess to what extent these elements apply to their home country.

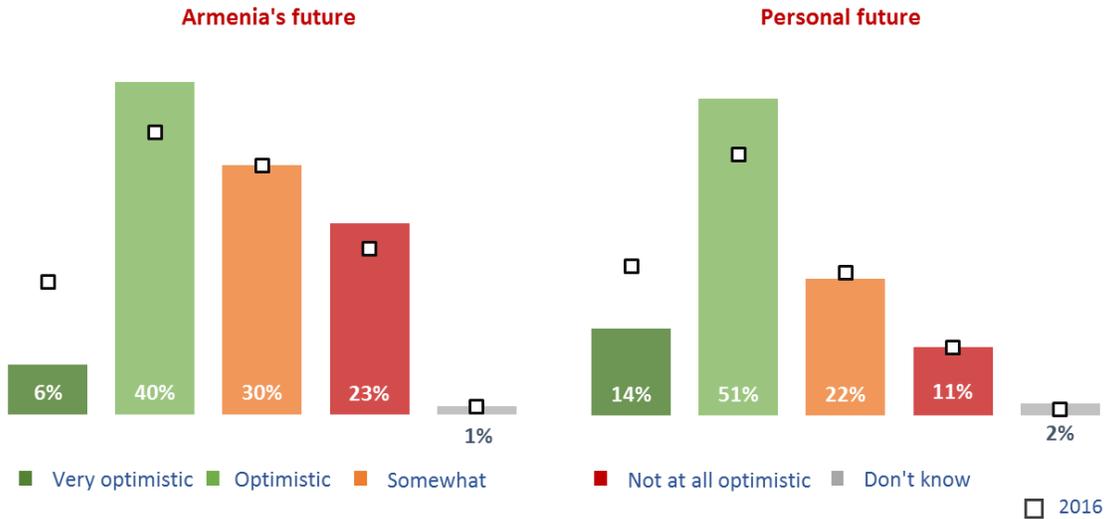
FIGURE 24 – To what extent do you think that the following elements apply in Armenia? (Q4.4)



3.4.2. Future expectations

Armenians are generally more optimistic about their own future (65%) than the future of their country (46%), although in both cases the share of the people who felt very optimistic decreased, showing a shift towards moderate optimism (fig. 25).

FIGURE 25 – How optimistic are you about the future of your country? (Q4.5) & How optimistic are you about your personal future? (Q4.6)



The level of optimism in terms of the country’s future seems to be correlated with the place of residence, as inhabitants of the capital seem to be less optimistic compared to smaller and medium city residents (42% vs. 50%-48%), while people from northern regions express more optimism than those living in central and southern parts (53% vs. 44% and 47% respectively). It should be noted that correlation of the level of optimism with different socio-demographic characteristics coincides with the views of Armenians about the way democracy works in their country - namely, dissatisfaction with the level of democracy was higher among the inhabitants of the capital, while individuals living in the northern parts of the Armenia appeared to be more satisfied with democracy in their homeland. Additionally, optimistic views are somewhat more prevalent among the younger age group showing a decrease among older generations (15-34 years – 49%, 35-54 years – 46%, 55 years & above – 41%) (tab. 14).

TABLE 14 – Optimism regarding Armenia’s future

Q4.5- How optimistic are you about the future of your country?		Optimistic	Pessimistic	Don't know	Total
Settlement Size	Capital	42%	57%	1%	100%
	Between 20,000 and 150,000 inhabitants	50%	49%	1%	100%
	Less than 20,000 inhabitants	48%	52%	0%	100%
Gender	Male	48%	51%	1%	100%
	Female	45%	55%	0%	100%
Age group	15-34 years	49%	51%	0%	100%
	35-54 years	46%	52%	2%	100%
	55 years & above	41%	59%	0%	100%
Education level	Low/middle level	45%	54%	1%	100%
	High level	49%	51%	0%	100%
Employment status	Employed / Self employed	47%	53%	0%	100%
	Unemployed or temporarily not working / inactive	45%	54%	1%	100%
Geographical area	Centre	44%	55%	1%	100%
	North	53%	47%	0%	100%
	South	47%	53%	0%	100%
Total		46%	53%	1%	100%

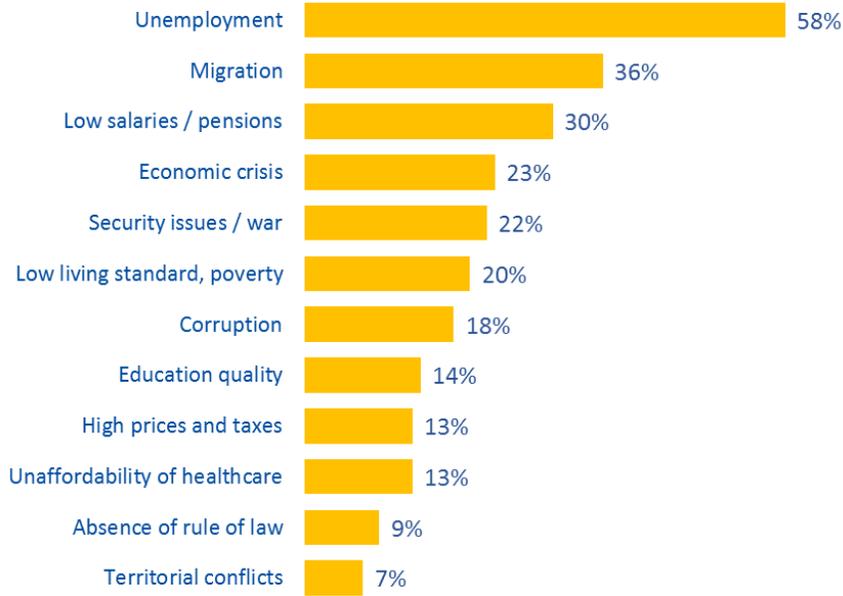
Although Armenians are more optimistic in terms of their personal future, socio-demographic trends are in line with the data observed while analysing optimism towards the country’s future: inhabitants of the capital seem to be less optimistic compared to smaller ones (59% vs. 68%-68%) and people from northern regions express more optimism than those living in central and southern parts (75% vs. 61% and 65% respectively). The young generation is more optimistic about their personal future compared to elderly (15-34 years – 75%, 35-54 years – 67%, 55 years & above – 45%) (tab. 15).

TABLE 15 – Optimism regarding personal future

		Optimistic	Pessimistic	Don't know	Total
Settlement Size	Capital	59%	41%	0%	100%
	Between 20,000 and 150,000 inhabitants	68%	31%	1%	100%
	Less than 20,000 inhabitants	68%	29%	3%	100%
Gender	Male	64%	34%	2%	100%
	Female	65%	34%	1%	100%
Age group	15-34 years	75%	24%	1%	100%
	35-54 years	67%	32%	1%	100%
	55 years & above	45%	51%	4%	100%
Education level	Low/middle level	62%	36%	2%	100%
	High level	74%	25%	1%	100%
Employment status	Employed / Self employed	68%	30%	2%	100%
	Unemployed or temporarily not working / inactive	62%	37%	1%	100%
Geographical area	Centre	61%	37%	2%	100%
	North	75%	25%	0%	100%
	South	65%	32%	3%	100%
Total		65%	33%	2%	100%

For the majority of Armenians (58%), unemployment is considered to be the most pressing problem followed by migration (36%) and low salaries/pensions (30%) (fig. 26).

FIGURE 26 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)



3.4.3. Views of the country and attitude towards the EU: snapshot

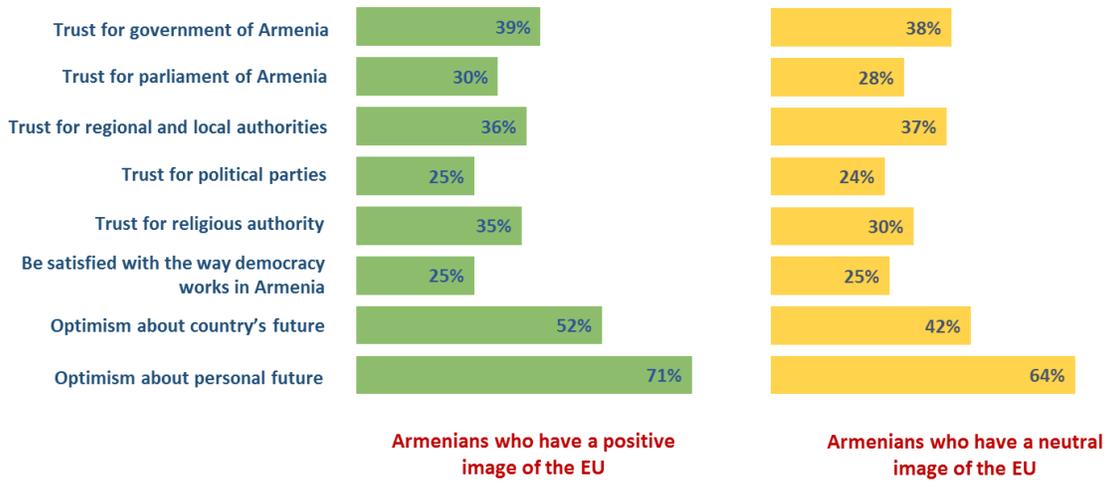
As in section 3.2.2, views of the country and attitude towards the EU have been analysed according to two main profiles: individuals who have a positive attitude towards the EU and those who are mostly neutral.¹⁶ Eight indicators were considered: trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about country’s future, and optimism about personal future.

The first thing to be noted is that, for the majority of indicators listed above, there are no major differences between those who have a positive image of the EU and those who feel neutral. The only visible difference is related to the level of optimism towards the country’s or personal future – people with a positive image of the EU are more optimistic in both cases (optimism for the country’s future among those with positive image of the EU 52%, among those with a neutral image of the EU 42%; optimism for personal future among those with a positive image of the EU 71%, among those with a neutral image of the EU 64%)¹⁷.

¹⁶ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

¹⁷ More details are provided in Annex, Table A7.

FIGURE 27 – Views of the country and attitude towards the EU: positive versus neutral



Regardless of their attitude towards the European Union, Armenians highlighted the same pressing problems in the country, with unemployment and migration on top of the list (58%-36%).¹⁸

¹⁸ More details on main findings are provided in Annex, Table A8.

4. Annex

TABLE A1 – Benefits from current EU support

Q2.8. To what extent would you say that Armenia has benefitted from the current European Union support in the following areas?

	Very much	Fairly	Not very much	Not at all	Don't know	Total
Access to more products and services	10%	59%	17%	8%	6%	100%
More tourism	11%	58%	16%	8%	7%	100%
Improved quality of health-care system	8%	56%	17%	11%	9%	100%
Improved trade	6%	54%	22%	11%	7%	100%
Improved infrastructure	9%	50%	20%	12%	9%	100%
Greater economic development	5%	46%	30%	12%	7%	100%
Better education	9%	44%	26%	11%	10%	100%
Improved agricultural production	5%	43%	23%	14%	14%	100%
Improved democracy	3%	37%	32%	17%	10%	100%
Greater employment opportunities	3%	36%	32%	19%	10%	100%
Better law enforcement	5%	32%	31%	16%	16%	100%
Improved quality of the justice system	3%	30%	29%	20%	18%	100%
Less corruption	3%	22%	38%	29%	8%	100%

Percentages refer to Armenians who have heard about the EU

TABLE A2 – Areas in which the EU should play a greater role

Q2.9. Please tell us in which sectors you think the European Union should play a greater role

	The specific item was selected as the first most important area	The specific item was selected as the first or second or third most important area
Promote economic development	19%	45%
Create greater employment opportunities	18%	43%
Improve quality of health-care system	15%	38%
Promote a better education	10%	31%
Reduce corruption	8%	27%
Improve quality of the justice system	7%	24%
Improve agricultural production	5%	22%
Increase tourism	5%	15%
Improve democracy	5%	14%
Improve trade	3%	12%
Improve infrastructure	3%	11%
Promote access to more products and services	3%	9%
Promote better law enforcement	1%	8%

Percentages refer to Armenians who have heard about the EU

TABLE A3 – Attitudes towards the EU: positive versus neutral

		Image of the EU	
		Positive	Neutral
Trust towards the EU	Tend to trust	81%	55%
	Tend not to trust	10%	25%
	Do not know	9%	20%
	<i>Total</i>	100%	100%
Relations between the EU and Armenia	Good	83%	73%
	Bad	10%	12%
	Don't know/No relations	7%	15%
	<i>Total</i>	100%	100%
Awareness of financial support by the EU	Yes	75%	58%
	No	11%	22%
	Don't know	14%	20%
	<i>Total</i>	100%	100%
Effectiveness of the EU's support	Effective	72%	63%
	Not effective	22%	31%
	Don't know	6%	6%
	<i>Total</i>	100%	100%

TABLE A4 – Trust towards different type of media

Q3.9. & Q3.10. Which is your level of trust for following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	21%	19%	60%	100%
Television	61%	33%	6%	100%
Radio	30%	24%	46%	100%
Print media	32%	26%	42%	100%
Social media	44%	30%	26%	100%
Internet	52%	27%	21%	100%
Word of mouth	49%	41%	10%	100%
Country's media in Armenian	63%	32%	5%	100%
Country's media in Russian	46%	30%	24%	100%
Country's media in other languages	26%	35%	39%	100%
Foreign media in Russian	42%	32%	26%	100%
Foreign media in other languages	24%	32%	44%	100%

TABLE A5 – Type of media frequently used as a source of information and attitude towards the EU

		Type of media frequently used as source of information (Q3.8)		Word of mouth frequently used as source of information (Q3.8)	
		Only traditional media	Social media or internet	Yes	No
Perception of the EU	Positive	47%	57%	55%	50%
	Neutral	44%	35%	38%	43%
	Negative	8%	5%	5%	6%
	Don't know	1%	3%	2%	1%
	Total	100%	100%	100%	100%
Trust towards the EU	Tend to trust	54%	73%	68%	63%
	Tend not to trust	25%	16%	15%	25%
	Do not know	21%	11%	17%	12%
	Total	100%	100%	100%	100%
Relations between the EU and Armenia	Good	73%	76%	81%	71%
	Bad	12%	13%	8%	16%
	Don't know/No relations	15%	11%	11%	13%
	Total	100%	100%	100%	100%
Awareness of financial support by the EU	Yes	62%	71%	70%	63%
	No	21%	13%	13%	20%
	Don't know	17%	16%	17%	17%
	Total	100%	100%	100%	100%
Effectiveness of the EU's support	Effective	67%	69%	70%	64%
	Not effective	30%	25%	23%	32%
	Don't know	3%	6%	7%	4%
	Total	100%	100%	100%	100%

Percentages refer to Armenians who have heard about the EU

TABLE A6 – Frequent usage of media in Russian and attitude towards the EU

		Frequently used media in Russian	
		Yes	No
Perception of the EU	Positive	62%	47%
	Neutral	29%	47%
	Negative	8%	4%
	Don't know	1%	2%
	Total	100%	100%
Trust towards EU	Tend to trust	71%	62%
	Tend not to trust	18%	22%
	Do not know	11%	16%
	Total	100%	100%
Relations between the EU and Armenia	Good	82%	72%
	Bad	12%	12%
	Don't know/No relations	6%	16%
	Total	100%	100%
Awareness of financial support by the EU	Yes	74%	62%
	No	15%	18%
	Don't know	11%	20%
	Total	100%	100%
Effectiveness of the EU support	Effective	66%	69%
	Not effective	28%	26%
	Don't know	6%	5%
	Total	100%	100%

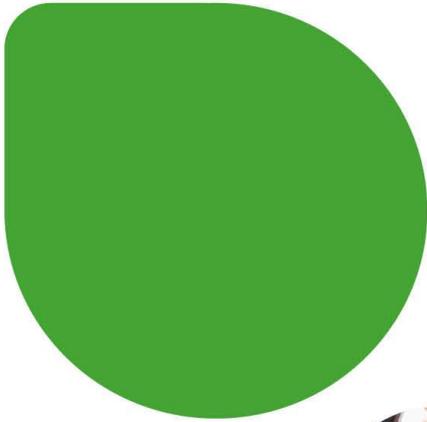
Percentages refer to Armenians who have heard about the EU

TABLE A7 – Views of the country and attitude towards the EU: positive versus neutral

		Attitude towards the EU	
		Positive	Neutral
Trust for government of Armenia	Tend to trust	39%	38%
	Tend not to trust	59%	59%
	Don't know	2%	3%
	Total	100%	100%
Trust for parliament of Armenia	Tend to trust	30%	28%
	Tend not to trust	67%	69%
	Don't know	3%	3%
	Total	100%	100%
Trust for regional and local authorities	Tend to trust	36%	37%
	Tend not to trust	60%	60%
	Don't know	4%	3%
	Total	100%	100%
Trust for political parties	Tend to trust	25%	24%
	Tend not to trust	70%	68%
	Don't know	5%	8%
	Total	100%	100%
Trust for religious authority	Tend to trust	35%	30%
	Tend not to trust	57%	60%
	Don't know	8%	10%
	Total	100%	100%
Satisfaction with the way democracy works in Armenia	Yes	25%	25%
	No	71%	71%
	Don't know	4%	4%
	Total	100%	100%
Optimism about country's future	Optimistic	52%	42%
	Pessimistic	47%	57%
	Don't know	1%	1%
	Total	100%	100%
Optimism about personal future	Optimistic	71%	64%
	Pessimistic	27%	34%
	Don't know	2%	2%
	Total	100%	100%

TABLE A8 – Most pressing problems in Armenia

Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)		
	Attitude towards the EU	
	Positive	Neutral
Unemployment	60%	64%
Economic crisis	24%	23%
Corruption	19%	19%
Low living standard, poverty	22%	15%
Territorial conflicts	6%	6%
Security issues / war	19%	23%
Low salaries / pensions	30%	28%
High prices and taxes	17%	8%
Unaffordability of healthcare	13%	12%
Education quality	14%	14%
Absence of rule of law	8%	9%
Migration	36%	40%



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