

ANNUAL SURVEY REPORT: AZERBAIJAN

2nd Wave (Spring 2017)

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

June 2017

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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 develops information and communication materials, carries 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 **Azerbaijan**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Azerbaijan
- 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).

³ Geographical areas: 1) North-East (Absheron, Dakhlik Shirvan, Guba-Khachmaz, Shaki-Zagatala); 2) South-East (Baku city, Lankaran, Aran); 3) West (Ganja-Gazakh).

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

- Almost every second Azerbaijani citizen (47%) has a very or fairly positive image of the EU, compared to 9% of the population who are negatively disposed towards the Union. Every fourth person (25%) is neutral in this regard and one in ten (11%) have never heard of the EU.
- Azerbaijanis who have heard about/know the EU strongly believe that the EU represents such values as human rights (overall 81% of people share this belief), freedom of speech, democracy and the rule of law (each 80%), freedom of the media and economic prosperity (each 79%), equality and social justice, individual freedom and honesty and transparency (each 74%). Fewer people, but still more than half of the population – are convinced that the EU represents such values as peace, security and stability (65%), absence of corruption (60%), respect for other cultures (54%) and freedom of religion (50%). The findings for most of the values are consistent with last year's survey, as people shared similar beliefs in 2016. However, there has been a notable decrease in the proportion of people who strongly associate the EU with freedom of religion (74% in 2016 vs. 50% in 2017). Similarly, the share of those who believe that the EU represents peace, security and stability has also decreased by 12% since 2016.
- The European Union seems to be the most trusted foreign institution in Azerbaijan: half of the population tend to trust the EU (51%), while just over one third tend to trust the UN (35%) and NATO (32%) and only a quarter trust the Eurasian Economic Union (26%).

EU relations with Azerbaijan and awareness of EU financial support

- The opinion on the relations between Azerbaijan and the European Union remains unchanged since 2016. Namely, 68% of people describe the relationship as positive in 2017, compared to 71% in 2016. Likewise, the proportion of people describing this relationship as negative stands at roughly the same level (22% in 2017 vs. 21% in 2016).
- Similar to the results of last year's survey, a third of the citizens of Azerbaijan know that the EU provides financial support to their country. Every fourth person thinks the EU does not provide any financial support and 4 in 10 people do not have an answer to this question. The share of people who believe that the financial support provided by the EU is effective has decreased from 76% to 65% in 2017, at the expense of a notable increase in the number of individuals who consider that this support is not very effective (5% in 2016 vs. 24% in 2017).
- 38% of those who are aware of the EU's financial support know about specific EU-funded programmes in Azerbaijan, such as educational programmes (64%), medicine (37%) and agriculture and rural development projects (27%).

- The majority of people report not having 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) (57%), the United States of America (48%), the United Nations and its agencies (55%), and the Russian Federation (48%). Around a quarter of citizens consider the EU to be a bigger foreign donor in Azerbaijan than the other institutions mentioned above. Only 13 to 17% of the population think that the IMF/WB, USA, UN and RF provide more financial support to Azerbaijan than the EU does. The observed trend is consistent with last year's findings, although the share of people who have no definite opinion regarding this issue appears to have increased while the proportion of those who consider that other institutions provide more support to Azerbaijan than the EU has decreased.
- The majority of residents of Azerbaijan still believe that their country has benefitted fairly – and to a lesser extent very much – from the EU's support and name tourism (60%), improved trade (50%), better education (42%), access to more products and services (41%), improved quality of the healthcare system (41%) and improved democracy (40%) as the main benefits.
- According to the Azerbaijani population, the least supported areas are also those in which the EU should play a greater role. The top three areas that require stronger EU support are economic development (43%), education (40%) and democracy (37%); more than a third of citizens also think that the EU should help the country to create more employment opportunities (33%) and a quarter still believe that the EU should support Azerbaijan in decreasing the level of corruption (26%).

Attitudes towards the EU: a snapshot

- Unsurprisingly, and similarly to the results of the 2016 survey, individuals who have a positive image of the EU are also more likely to trust the Union, rate the relationship between the EU and their country positively and be aware of and acknowledge the effectiveness of the EU's financial support, compared to those with a neutral attitude towards the EU. In particular, 69% of those who have a positive attitude also tend to trust the EU, compared to 39% of those who are mostly neutral, while 74% of positively disposed people also consider the EU's financial support to be effective, as opposed to 48% of those who are neutral about the EU. A difference of around 20% between positively and neutrally oriented people was recorded for the evaluation of the relations of Azerbaijan with the EU and awareness of the EU's financial support (82% vs. 64% and 44% vs. 25% respectively).
- Individuals who have a positive image of the EU are more likely to strongly link all important values with the EU in comparison to the neutral population – human rights (93%), rule of law (91%), democracy (90%) and freedom of speech (90%) are strongly and very strongly linked with the Union. Neutrally oriented citizens, on the other hand, mostly associate the EU with economic prosperity, freedom of speech and human rights (82%, 81% and 80% respectively).
- Similarly, Azerbaijanis with positive attitudes towards the EU see more benefits for their country from the EU than neutrally oriented individuals do. Positively oriented people believe that the European Union has very much or fairly encouraged tourism and has helped the country in terms of trade (64% and 58% respectively). Neutrally oriented individuals share this opinion too, although they mention improved trade less frequently (more tourism – 60%; improved trade – 46%). Among the next most cited benefits for positively oriented individuals are improved healthcare, better education and improved democracy, while those with a neutral image attach greater importance to access to more products and services and improved infrastructure.

Media usage as sources of information

- Television is the most popular media channel in Azerbaijan – 63% of the population always watch television, 19% often and 12% sometimes. The next most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.), as stated by 70% of the population, although with different frequencies.
- Almost all of the Azerbaijani population (69% always, 12% often and 12% sometimes) rely on media in their own language; the country's media in Russian is the second most frequently consumed media, named by 45% of population, followed by foreign media in other languages (35%). The country's media in other languages and foreign media in Russian are never consumed by the majority of people.

Sources of information about the EU

- 37% of Azerbaijani residents, out of those who are aware of the EU, state that they have seen or heard about the Union in the last three months, as compared to 48% in 2016.
- 44% of people feel that the national media represents the European Union very positively or fairly positively and only every tenth person thinks the opposite; the share of those who consider it to be neutral is quite high and makes up 31%. As compared to 2016, the proportion of people who think that the EU is positively represented in the national media has decreased by 10 per cent in 2017, while the number of those who think that the EU is negatively represented in the national media or find it difficult to respond to this question has increased to some extent.
- Information on the European Union is accessed frequently or very frequently by 28% of the population. This figure has increased by 9 per cent compared to 2016, decreasing the share of people who have never accessed this type of information (from 59% to 47%).
- The majority of people who search for information about the EU access information in their national language (84%), while 8% use Russian and 5% English. The most commonly searched for information about the European Union concerns social and political news (38%), while up to a third of the population search for information about the lifestyle in the EU, economic news and information about educational and cultural programmes.
- While passive exposure to information about the EU mostly stems from television (76%) and to some extent from the internet (29%), social media (21%) and word of mouth (21%), those actively searching for/accessing information still rely on television channels (69%), but the importance of the internet is higher in this case (45%).
- More than half of Azerbaijani residents who search for information about the EU rate the information as being accessible (very – 14%; fairly – 40%) and comprehensive (very – 15%; fairly – 37%); almost the same share of people think that the information is user-friendly (46%), reliable (46%) and trustworthy (46%).
- Every fifth Azerbaijani (21%), out of those who have heard about the EU, have used EU informational websites at least once, of which the Facebook profile is the most frequently used.

Source of information and attitude towards the EU

- Social media and internet users are, in general, more positively oriented and trustful towards the EU, and are also more informed. Trust towards the EU and acknowledgement of the effectiveness of its financial support is about 10 per cent higher among social media and internet users compared to those using traditional media; the gap in terms of positive attitudes towards the EU is even higher at 16 per cent. No major differences can be observed between groups in terms of evaluating relations between the EU and Azerbaijan, but awareness of the EU's financial support is only 25% among traditional media users, while this figure goes up to 43% among social media and internet users.
- No major differences can be observed between Russian media users and those not consuming Russian media in terms of positive evaluation of the EU's financial support and positive attitudes towards the EU (differences of 4 and 5 per cent respectively); however, Russian media users tend to trust the EU more, evaluate the relationship between the EU and Azerbaijan more positively and be more aware of the EU's financial support (7 per cent for each).

View of Azerbaijan's current situation

- Just like in 2016, the majority of Azerbaijani citizens share a great deal of trust towards the government of the country (81%). Trust towards the parliament and local authorities has however decreased since 2016 and has shifted towards a stance of "don't know". However, these two institutions still score above average in terms of their trust levels, with 57% and 54% respectively. Political parties, on the other hand, still have the lowest level of trust (43%) among political institutions. Interestingly, trust towards religious authority (a new variable which was introduced in 2017) is quite low (lower than the trust levels towards any of the political institutions), and positive and negative attitudes are almost equal (37% and 34% respectively).
- There has been a slight decrease in the share of those who show appreciation with the current state of democracy in Azerbaijan (down 6 per cent) compared to 2016 and about half of citizens (53%) remain dissatisfied with the way democracy works in the country.
- The majority of Azerbaijanis (71%) believe that the protection of the rights of minorities is the characteristic which applies to their country most, followed by gender equality (64%), good governance (60%) and rule of law (58%). Although positive, these indicators are lower than 2016.

Future expectations

- Optimistic views, be it on a national or personal level, have significantly decreased among the Azerbaijani population: in 2016, 77% of the population felt optimistic towards both Azerbaijan's future and their personal future, while optimism towards the country's future scored just 58% in 2017. Although people are more optimistic about their personal futures, a 12 per cent decrease can still be observed in this respect.
- The most pressing problem for Azerbaijani residents is unemployment (80%), a significantly higher percentage than the next most frequently named problem (low salaries/pensions – 33%). 20 to 30% of people name security issues/war, low living standards/poverty, corruption, territorial conflicts, high prices and taxes and economic crisis among the pressing problems.

Views of the country and attitude towards the EU

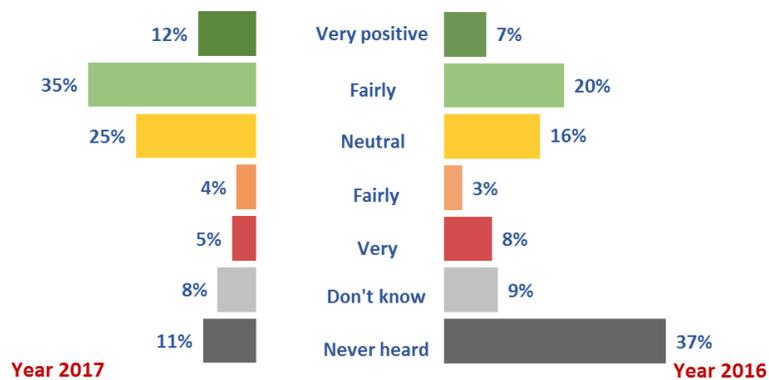
- Individuals who have a positive image of the EU and those with neutral views do not show any major differences in terms of trust towards government bodies; the two populations are also more or less similar in terms of satisfaction with the way democracy works in Azerbaijan and optimism about the country's or their personal future. On the other hand, political parties and religious authority are much more favoured by people positively disposed towards the EU.
- Almost everyone, regardless of their attitude towards the European Union, indicates the same pressing problems in Azerbaijan, with unemployment at the top of the list. The only observable difference relates to security issues/war, which is more frequently cited by those with a neutral image of the EU.

3.2. Perceptions of the European Union

3.2.1. General perceptions of the EU

In 2017, the European Union mostly conjures up a positive image for Azerbaijanis: 47% feel positive towards the EU (35% fairly positive and 12% very positive). Compared to 2016, there has been an appreciable increase in positive, fairly positive attitudes (+20%). There has been a marginal decrease in the number of persons who have a negative image of the EU (-2%); approximately one out of ten Azerbaijanis is either fairly or very negative about the EU. One out of four citizens feels neutral about the EU (25%). The number of persons who stated that they had never heard about the EU declined from 37% to 11% (fig. 1)⁶.

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



In general, residents of medium-sized settlements (54%) and people under 55 (48% of the middle age group and 50% of the younger group), people living in in the north-east and south-east parts of the country (51% and 48% respectively) and those with a high level of education (54%) seem to feel more positive towards the European Union compared to other groups (tab. 1). In addition, the biggest proportion of individuals who don't know or have never heard of the EU is observed among residents of the western part of the country (33%) and people over 55 (25%). Azerbaijani citizens who feel neutral about the EU are evenly distributed across the various socio-demographic groups, with lower proportions observed among residents of the west of the country and medium-sized settlements (each 18%).

⁶ In 2016, almost 37% of Azerbaijanis stated they had never heard of the EU. This finding showed a level of unawareness of the EU in Azerbaijan much higher than in the other EaP countries. Besides the quality check procedures implemented on data gathered in 2016, before starting the new data collection in 2017, a cognitive test was designed and carried out to test the questionnaire in Azerbaijan. The in-depth cognitive interviews aimed at capturing people's thought processes and understanding in responding to questions (especially those about the EU image) and were addressed to individuals with different levels of education, of both genders and of different ages. As a result of this in-depth analysis, it became clear that there is no singular term for the EU in the local language. Consequently, the questionnaire was refined to include the most common translations of the EU. The goal was to capture all people who are knowledgeable of the EU whichever name they use. This change could explain, at least partially, the decrease in the population who stated that they had never heard of the EU in 2016.

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	Equal to or more than 150,000 inhabitants	49%	26%	11%	14%	100%
	Between 20,000 and 150,000 inhabitants	54%	18%	8%	20%	100%
	Less than 20,000 inhabitants	44%	27%	8%	21%	100%
Gender	Male	45%	27%	11%	17%	100%
	Female	49%	23%	7%	21%	100%
Age group	15-34 years	50%	25%	8%	17%	100%
	35-54 years	48%	26%	9%	17%	100%
	55 years & above	37%	27%	11%	25%	100%
Education level	Low/Medium level	46%	25%	9%	20%	100%
	High level	54%	27%	11%	8%	100%
Employment status	Employed / Self-employed	49%	25%	10%	16%	100%
	Unemployed or temporarily not working / inactive	43%	26%	7%	24%	100%
Geographical area	North-East	51%	30%	7%	12%	100%
	South-East	48%	25%	9%	18%	100%
	West	35%	18%	14%	33%	100%
Total		47%	25%	9%	19%	100%

Azerbaijanis who have heard about/know the EU strongly believe that the EU represents such values as human rights (overall 81% of people share this belief), freedom of speech, democracy and rule of law (each 80%), freedom of the media and economic prosperity (each 79%), equality and social justice, individual freedom and honesty and transparency (each 74%). Fewer people – but still more than half of the population – are convinced that the EU represents such values as peace, security and stability (65%), absence of corruption (60%), respect for other cultures (54%) and freedom of religion (50%). The findings for most of the values are consistent with last year's survey, as Azerbaijani citizens shared similar beliefs in 2016. However, a notable decrease has been observed in relation to people who strongly associate the EU with freedom of religion (74% in 2016 vs. 50% in 2017). Similarly, the share of those who believe that the EU represents peace, security and stability has also decreased by 12% since 2016.

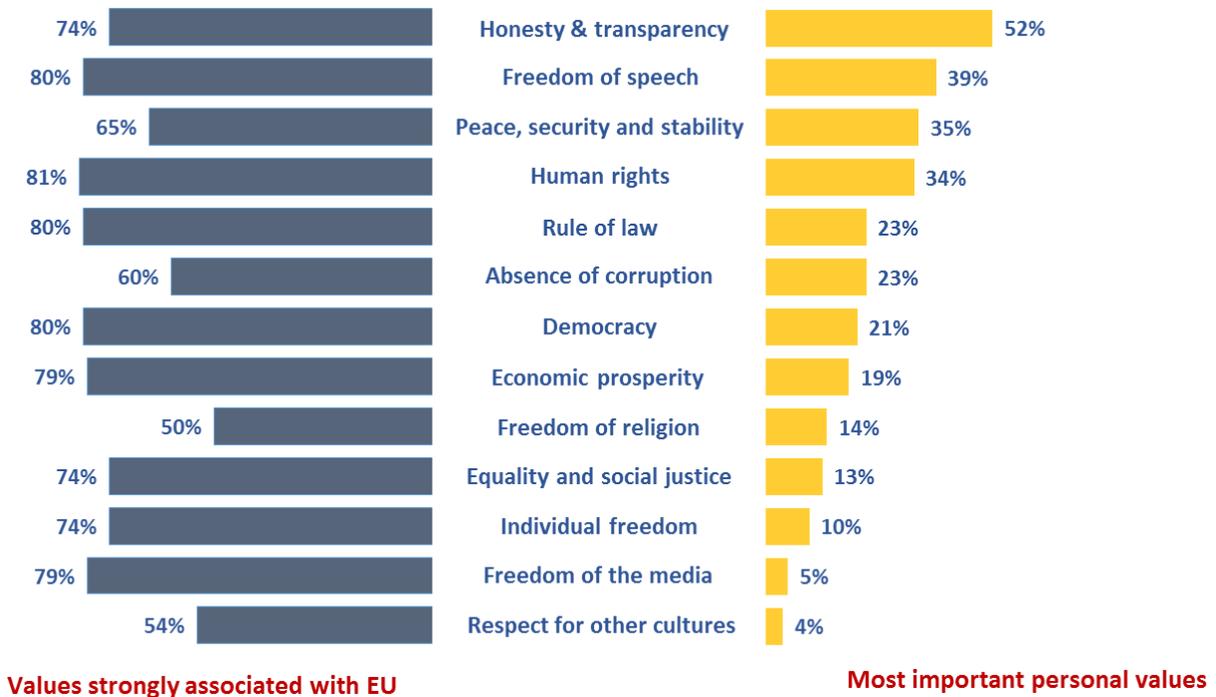
TABLE 2 – Values associated with the EU

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
Human rights		27%	54%	8%	5%	6%	100%
Freedom of speech		27%	53%	10%	4%	6%	100%
Democracy		27%	53%	10%	3%	7%	100%
Rule of law		23%	57%	12%	3%	5%	100%
Economic prosperity		29%	50%	10%	4%	7%	100%
Freedom of the media		23%	56%	6%	5%	10%	100%
Equality and social justice		19%	55%	10%	5%	11%	100%
Individual freedom		22%	52%	14%	4%	8%	100%
Honesty and transparency		21%	53%	13%	6%	7%	100%
Peace, security and stability		13%	52%	20%	5%	10%	100%
Absence of corruption		18%	42%	18%	5%	17%	100%
Respect for other cultures		14%	40%	21%	9%	16%	100%
Freedom of religion		13%	37%	23%	10%	17%	100%

Percentages refer to Azerbaijanis who have heard about the EU

Figure 2 compares the values that are strongly associated with the EU with the most important personal values for Azerbaijani citizens⁷. The most important personal values for people, such as honesty and transparency (52%), freedom of speech (39%) and human rights (34%) are also strongly associated with the EU. One value that displayed a weaker association with the EU was freedom of religion (50%), which was also of relatively little importance on a personal level (14%). Such values as rule of law, absence of corruption, democracy, economic prosperity and equality and social injustice represent important personal values for less than a quarter of the population, ranging from 13 to 23 per cent. Individual freedom, freedom of the media and respect for other cultures were rated as important values by less than 10% of Azerbaijani citizens.

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



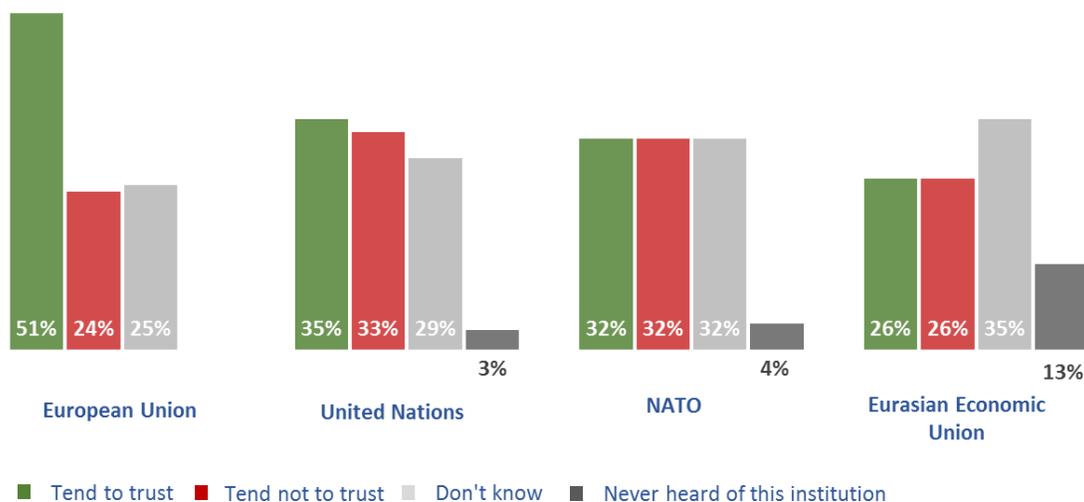
Percentages refer to Azerbaijanis who have heard about the EU

Perceptions of the EU were also assessed through an open-ended question where respondents were asked to name the first issues that came to their mind when thinking of the EU. Just under one in three respondents (28%) did not answer the question, either because it was too hard to answer or they had nothing to say about the EU. Every fourth person (24%) named European integration and one in ten people associate the EU with development/progress and economic prosperity/high standard of living.

The European Union seems to be the most trusted foreign institution in Azerbaijan: half of the population tend to trust the EU (51%), while around a third tend to trust the UN (35%) and NATO (32%) and only a quarter trust the Eurasian Economic Union (26%) (fig. 3).

⁷ Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

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



Percentages refer to Azerbaijanis who have heard about the EU

The level of trust in the European Union increases with the level of education: 60% of highly-educated individuals tend to trust the EU, compared to 49% of Azerbaijanis with medium or low levels of education (tab 3). The European Union is also particularly trusted by people living in medium-sized settlements (62%) and employed citizens (55%). The biggest proportions of individuals who tend not to trust the EU are observed among male citizens (32%) and those residing in the western part of the country (30%). Unemployed individuals and residents of north-eastern and/or western areas of Azerbaijan, as well as residents of large settlements (29%) and small settlements (24%) appear to be less informed about the EU compared to other groups (from 28 to 32%).

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 or never heard of the EU	Total
Settlement size	Equal to or more than 150,000 inhabitants	45%	26%	29%	100%
	Between 20,000 -and150,000 inhabitants	62%	22%	16%	100%
	Less than 20,000 inhabitants	52%	24%	24%	100%
Gender	Male	48%	32%	20%	100%
	Female	54%	17%	29%	100%
Age group	15-34 years	52%	24%	24%	100%
	35-54 years	49%	23%	28%	100%
	55 years & above	50%	27%	23%	100%
Education level	Low/Medium level	49%	25%	26%	100%
	High level	60%	22%	18%	100%
Employment status	Employed / Self-employed	55%	24%	21%	100%
	Unemployed or temporarily not working / inactive	43%	25%	32%	100%
Geographical area	North-East	49%	20%	31%	100%
	South-East	53%	25%	22%	100%
	West	42%	30%	28%	100%
Total		51%	24%	25%	100%

Percentages refer to Azerbaijanis who have heard about the EU

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

The majority of Azerbaijani people describe the relationship between Azerbaijan and the EU as positive, whereas 22% think that their country's relations with the Union are either fairly or very bad (fig. 4).

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



Percentages refer to Azerbaijanis who have heard about the EU

The study results suggest that individuals residing in large and medium-sized settlements (75% and 78% respectively), female citizens (73%) and those living in the north-east and south-east of Azerbaijan (77% and 69% respectively) tend to have a more positive opinion regarding EU-Azerbaijan relations compared to other groups. Individuals residing in the western part of the country (19%) appear to be more undecided about this issue compared to others.

TABLE 4 – Relations between the EU and Azerbaijan

Q2.4. In general, how would you describe the relations that the European Union has with Azerbaijan?					
		Good	Bad	Don't know/No relations	Total
Settlement size	Equal to or more than 150,000 inhabitants	75%	17%	8%	100%
	Between 20,000 and 150,000 inhabitants	78%	14%	8%	100%
	Less than 20,000 inhabitants	61%	27%	12%	100%
Gender	Male	63%	28%	9%	100%
	Female	73%	15%	12%	100%
Age group	15-34 years	69%	21%	10%	100%
	35-54 years	69%	21%	10%	100%
	55 years & above	65%	25%	10%	100%
Education level	Low/Medium level	68%	22%	10%	100%
	High level	72%	22%	6%	100%
Employment status	Employed / Self-employed	70%	22%	8%	100%
	Unemployed or temporarily not working / inactive	65%	22%	13%	100%
Geographical area	North-East	77%	16%	7%	100%
	South-East	69%	22%	9%	100%
	West	50%	31%	19%	100%
Total		68%	22%	10%	100%

Percentages refer to Azerbaijanis who have heard about the EU

Similar to last year’s survey, nearly a third of Azerbaijanis know that the EU provides financial support to their country, while one in five think it does not and 4 out of 10 people do not have an answer to this question (tab. 5). Analysis of this variable by various socio-demographic parameters did not reveal any substantial differences across the groups. The only thing that could be highlighted in this regard is the relatively bigger proportion of individuals observed among residents of medium-sized cities who declare they know that the EU provides financial support to Azerbaijan (40%). The same share also find it difficult to answer the question (don’t know – 40%). In general, quite a large portion of Azerbaijanis (43%) are not informed about the provision of financial support by the EU and accordingly, cannot provide neither positive or negative answer on the question.

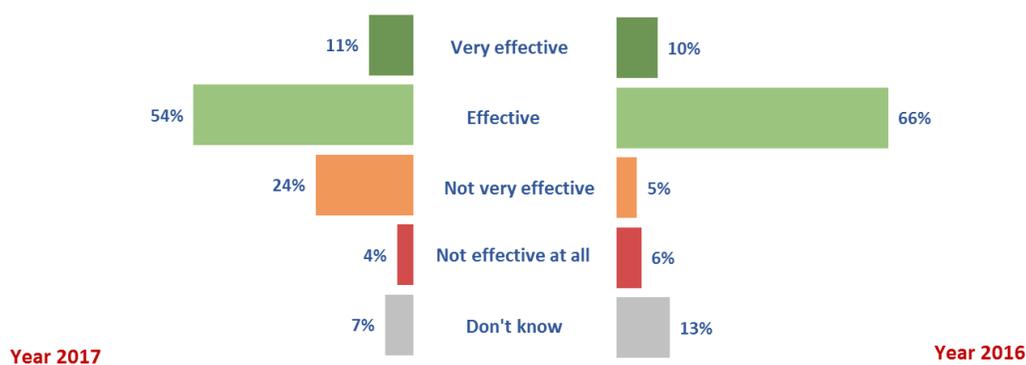
TABLE 5 – Provision of financial support by the EU

Q2.5. As far as you know, does the European Union provide Azerbaijan with financial support?		Yes	No	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	31%	35%	34%	100%
	Between 20,000 and 150,000 inhabitants	40%	20%	40%	100%
	Less than 20,000 inhabitants	33%	17%	50%	100%
Gender	Male	33%	31%	36%	100%
	Female	33%	18%	49%	100%
Age group	15-34 years	31%	24%	45%	100%
	35-54 years	37%	23%	40%	100%
	55 years & above	32%	26%	42%	100%
Education level	Low/Medium level	33%	24%	43%	100%
	High level	37%	25%	38%	100%
Employment status	Employed / Self-employed	34%	24%	42%	100%
	Unemployed or temporarily not working / inactive	32%	24%	44%	100%
Geographical area	North-East	31%	23%	46%	100%
	South-East	33%	25%	42%	100%
	West	36%	21%	43%	100%
Total		33%	24%	43%	100%

Percentages refer to Azerbaijanis who have heard about the EU

As shown in the figure below (fig. 5), the share of people believing the financial support provided by the EU to be effective has decreased from 76% to 65% in 2017 while there has been a notable increase in the number of individuals who consider this support to be not very effective (5% in 2016 vs. 24% in 2017).

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



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

Notably, the highest percentages of individuals who believe the financial support provided by the EU has been effective are those with high levels of education (74%), who are female (73%), reside in medium-sized settlements of 20,000-150,000 inhabitants (73%), belong to the middle age group (71%) and live in the south-eastern part of the country (70%) (tab. 6). The people more negative about the effectiveness of EU support reside in the western part of the country (48%) and the largest proportion of individuals uncertain on this issue can be found among those aged 55 and above (20%).

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	Equal to or more than 150,000 inhabitants	64%	23%	13%	100%
	Between 20,000 and 150,000 inhabitants	73%	20%	7%	100%
	Less than 20,000 inhabitants	62%	33%	5%	100%
Gender	Male	56%	34%	10%	100%
	Female	73%	22%	5%	100%
Age group	15-34 years	66%	29%	5%	100%
	35-54 years	71%	24%	5%	100%
	55 years & above	46%	34%	20%	100%
Education level	Low/Medium level	63%	29%	8%	100%
	High level	74%	22%	4%	100%
Employment status	Employed / Self-employed	65%	29%	6%	100%
	Unemployed or temporarily not working / inactive	63%	25%	12%	100%
Geographical area	North-East	63%	24%	13%	100%
	South-East	70%	24%	6%	100%
	West	47%	48%	5%	100%
Total		65%	28%	7%	100%

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

4 out of 10 of those who are aware of the EU's financial support know about specific EU-funded programmes in Azerbaijan (tab. 7). Cross analysis by various socio-economic groups did not reveal major differences; however, it should be noted that relatively higher shares of individuals knowledgeable about specific EU-funded programmes could be observed among male citizens (43%), residents of large and medium-sized settlements (42% and 43% respectively) and over 55s (44%), compared to females, residents of small-sized settlements and the younger generation (34%, 35% and 36% respectively).

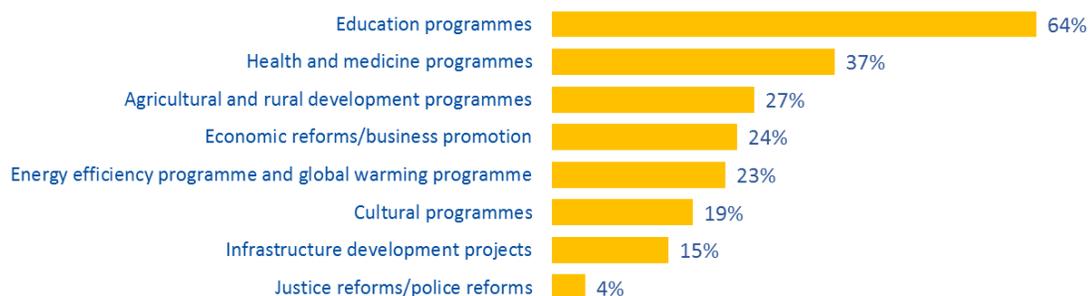
TABLE 7 – Programmes financed by the EU

Q2.6. Do you know of any specific programmes financed by the European Union in Azerbaijan?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	42%	58%	100%
	Between 20,000 and 150,000 inhabitants	43%	57%	100%
	Less than 20,000 inhabitants	35%	65%	100%
Gender	Male	43%	57%	100%
	Female	34%	66%	100%
Age group	15-34 years	36%	64%	100%
	35-54 years	39%	61%	100%
	55 years & above	44%	56%	100%
Education level	Low/Medium level	37%	63%	100%
	High level	45%	55%	100%
Employment status	Employed / Self-employed	37%	63%	100%
	Unemployed or temporarily not working / inactive	41%	59%	100%
Geographical area	North-East	40%	60%	100%
	South-East	38%	62%	100%
	West	40%	60%	100%
Total		38%	62%	100%

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

The most well-known EU-financed programmes in Azerbaijan are educational programmes (64%), followed by health and medicine (37%) (fig. 6). A quarter of people are aware of agricultural and rural development programmes (27%), economic reforms/business promotions (24%) and energy efficiency and global warming (23%). Programmes in the fields of culture and infrastructural development are known by less than one fifth of the population (19% and 15% respectively).

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

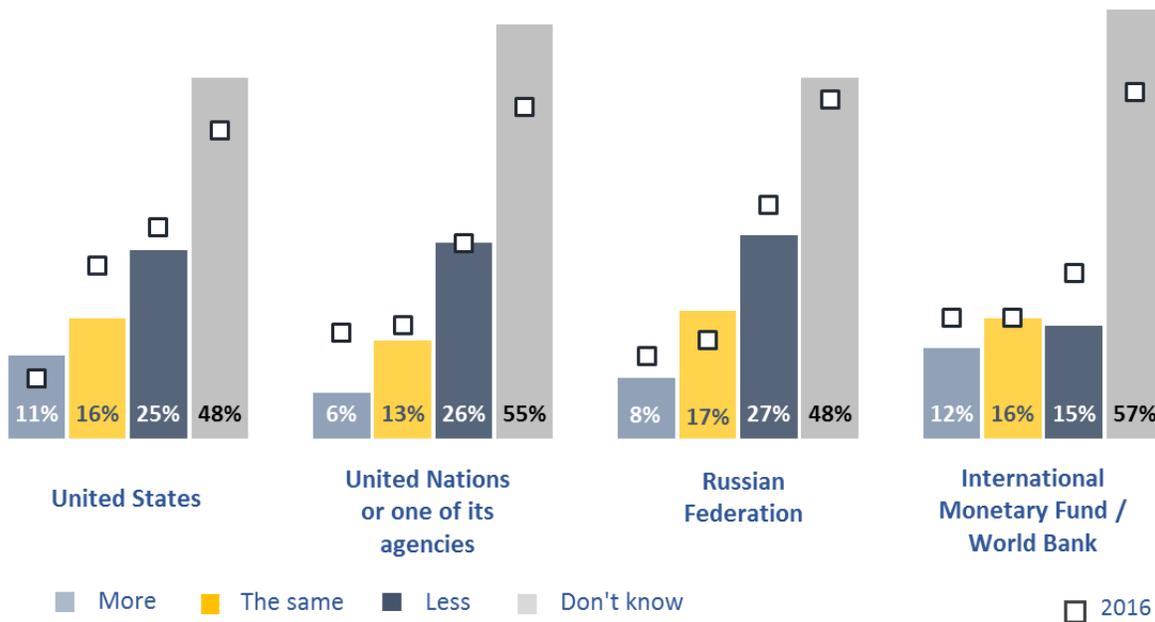


Percentages refer to Azerbaijanis who were aware of the EU's financial support

Overall 7% of Azerbaijanis declare they have been personally involved or know someone who has been involved in EU-funded projects. Among them, the majority just volunteered and one in three were a programme participant.

While nearly a quarter of Azerbaijani citizens are not aware of the EU's financial support to their country, two times as many people reported not having 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) (57%), the United States of America (48%), the United Nations and its agencies (55%) and the Russian Federation (48%). Around one quarter of citizens consider the EU to be a bigger foreign donor to Azerbaijan than the other institutions mentioned above (fig. 7). Only 13 to 17 per cent of the population think that the IMF/WB, USA, UN and RF provide more financial support to Azerbaijan than the EU. The observed trend is consistent with last year's findings, although the share of those who have no definite opinion regarding this issue appears to have increased at the expense of those who consider that other institutions provide more support to Azerbaijan compared to the EU.

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 Azerbaijanis who have heard about the EU

The majority of Azerbaijani citizens still believe that their country has fairly, and to a lesser extent very much benefitted from the EU's support (fig. 8).⁸ The main benefits cited include an increase in tourism (60%), improved trade (50%), better education (42%), access to more products and services (41%), improved quality of the healthcare system (41%) and improved democracy (40%). The list further continues with greater economic development (37%), improved agricultural production (37%), better law enforcement (36%) and improved infrastructure (34%). Quality of the justice system, employment and corruption are the least supported areas – only 29%, 26% and 19% of people respectively acknowledged some kind of benefit from the EU's support in these areas. Azerbaijanis shared similar beliefs last year.

⁸ More details are provided in Annex, Table A1.

The Azerbaijani population believe that economic development (43%) and better education (40%) are the major priorities for the country where the EU should play a greater role while quite a large portion of individuals also think that the EU provides assistance in this regard (37% and 42%, respectively). Tourism is named as the area that has benefitted from EU support the most (60%) and 35% of people think that this area really needs support.⁹ It is noteworthy that more than a third of Azerbaijani citizens also think that the EU should help the country in creating more employment opportunities (33%) and a quarter still believe that the EU should support Azerbaijan in decreasing the level of corruption (26%).

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



Areas that have benefitted from EU support

Areas that request a greater role of EU

Percentages refer to Azerbaijanis who have heard about the EU

⁹ 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.

3.2.3. Attitudes towards the EU: a snapshot

In this section, the attitude of the Azerbaijani population towards the EU has been analysed according to two main profiles: those who have a positive attitude towards the EU and those who are mostly neutral.¹⁰ Four indicators were considered: level of trust, relationship between Azerbaijan and the EU, awareness of EU financial support and effectiveness of EU support.

The first thing that should 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).¹¹ In particular, 69% of those who have a positive attitude also tend to trust the EU, compared to 39% of those who are mostly neutral; 82% of positively disposed people also consider the EU's financial support to be effective compared to 48% of those who are neutral about the EU. A difference of around 20 per cent between positively and neutrally oriented people was recorded for the evaluation of the relations between Azerbaijan and the EU and awareness of the EU's provision of financial support (82% vs. 64% and 44% vs. 25% respectively).

FIGURE 9 – Attitudes towards the EU: positive versus neutral

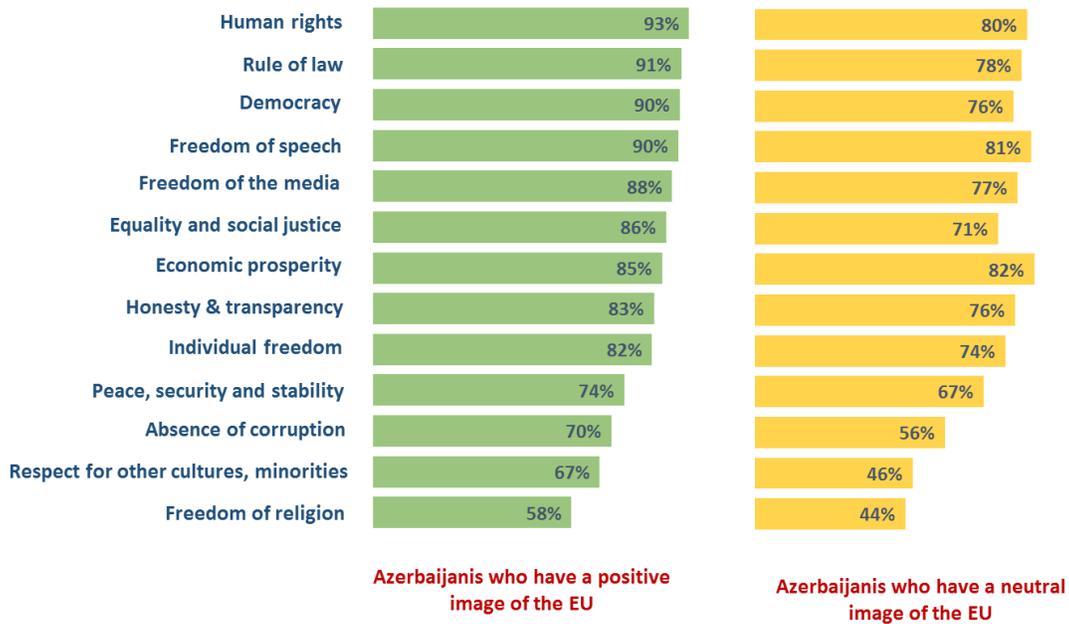


Analysis of the values associated with the EU by two groups show that individuals who have a positive image of the EU are also more likely to strongly link all values with the EU in comparison to the neutral population. Human rights, rule of law, democracy and freedom of speech (93%, 91%, 90% and 90% respectively) are strongly and very strongly linked with the Union by those who have a positive image of the EU. Neutrally oriented citizens, on the other hand, mostly associate the EU with economic prosperity, freedom of speech and human rights (82%, 81% and 80% respectively) (fig.10). The least associated values – such as respect for other cultures, minorities and freedom of religion – are the same for both groups, but again are expressed more frequently among those with a positive image of the EU.

¹⁰ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

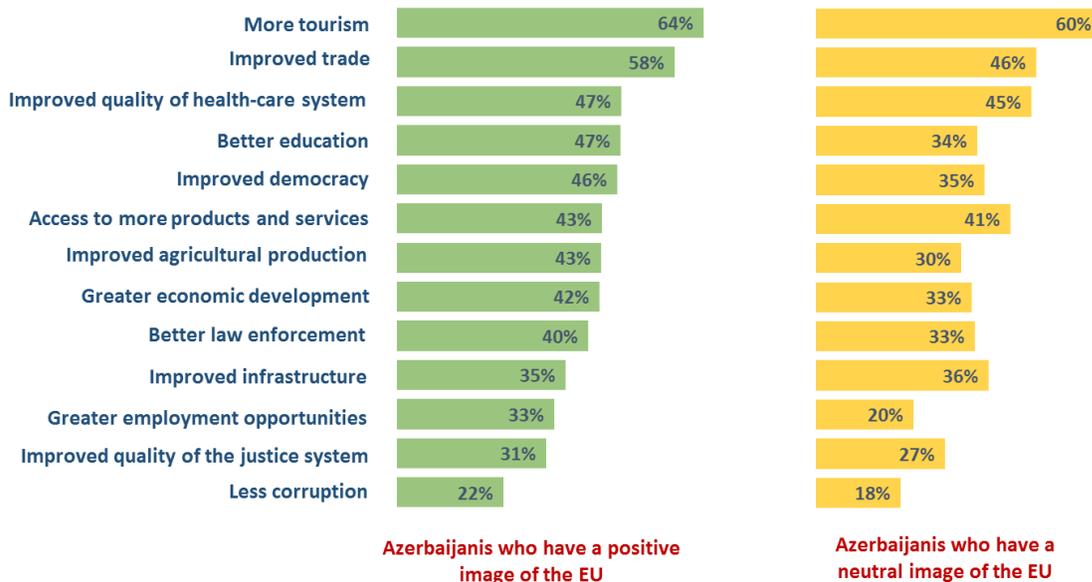
¹¹ More details are provided in Annex, Table A3.

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



Similarly, Azerbaijani citizens with positive attitudes towards the EU see more benefits for their country from the EU than neutrally oriented individuals. As shown in figure 11, positively oriented individuals believe that the European Union has very much or fairly encouraged tourism and has helped the country in terms of trade (64% and 58% respectively). Neutrally oriented individuals share this opinion too, although improved trade is mentioned less frequently, with a similar frequency to that with which they mention the improved healthcare system (more tourism – 60%; improved trade – 46%; improved quality of healthcare system – 45%). Among positively oriented individuals, improved healthcare, better education and improved democracy are the next most cited benefits, while among those neutrally disposed to the EU, access to more products and services and improved infrastructure are of more importance. Less corruption was named by a minority of both groups; additionally, greater employment opportunities are more recognised by the individuals with a positive attitude towards the EU compared to those with a neutral attitude.

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

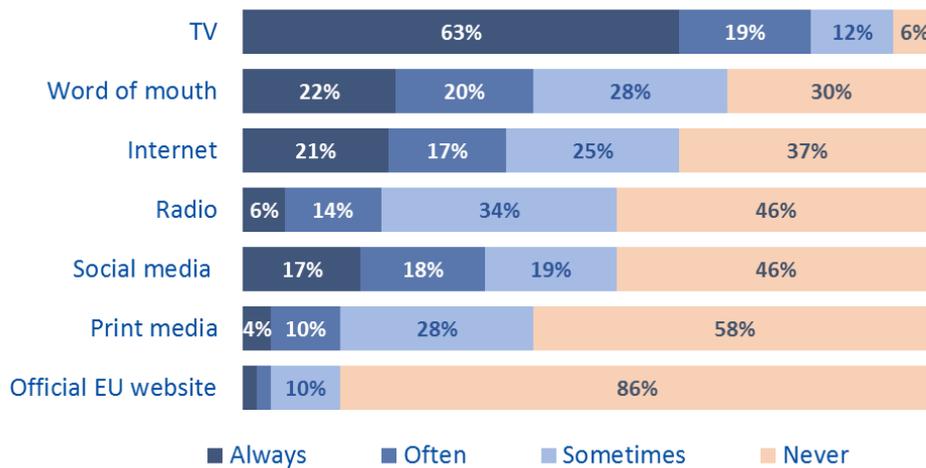


3.3. Sources of information on the EU

3.3.1. Media usage as sources of information

Television is the most popular media channel in Azerbaijan – 63% of the population always watch television, 19% often and 12% sometimes (fig. 12). The next most commonly used source of information is word of mouth (from neighbours, friends, colleagues, etc.), as stated by 70% of the population, although with different frequencies. Internet (used by 63% in total), social media (54%) and the radio (54%) are used as an information source by the majority of the population, while print media appears to be less popular with 42%. The official EU website is almost never used by the large majority of Azerbaijani people (86%).

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



The share of individuals who do not frequently use any of the above-mentioned media accounts for 8% of the population, while the share of those frequently using traditional media and social media/the internet is almost equal (48% and 44% respectively)¹² (tab. 8).

People from the oldest age group (55 years & above) (75%) and females (52%) depend on traditional media more in comparison to other subgroups. On the other hand, technological information sources are more popular among younger people. Internet and social media users are also more likely to be more highly educated (65%) and to live in the north-eastern and western parts of the country (54% and 50%) and in medium-sized settlements (55%).

Word of mouth, which is the second most consumed information source in general, is especially important for Azerbaijanis living in the western part of the country (71%).

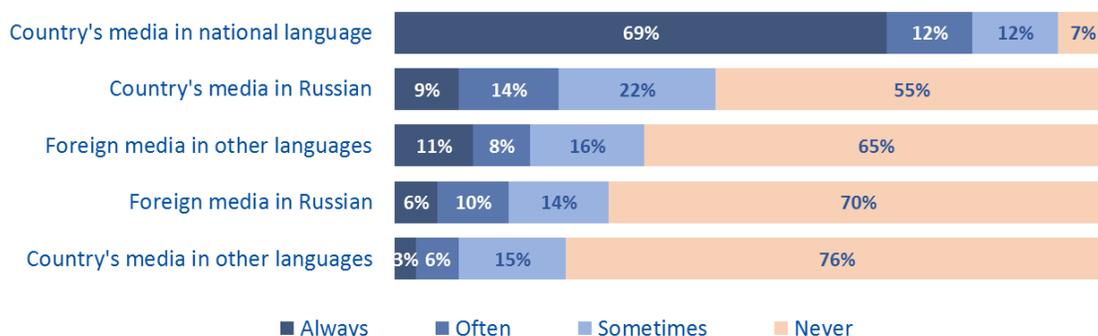
¹² The first group includes all individuals that do not “always or often” use any of the surveyed media; the second group includes all individuals that “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals that always or 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	Only social media or internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	7%	48%	45%	100%	50%
	Between 20,000 and 150,000 inhabitants	11%	34%	55%	100%	39%
	Less than 20,000 inhabitants	8%	51%	41%	100%	38%
Gender	Male	10%	43%	47%	100%	39%
	Female	5%	52%	43%	100%	46%
Age group	15-34 years	9%	32%	59%	100%	39%
	35-54 years	5%	54%	41%	100%	44%
	55 years & above	9%	75%	16%	100%	46%
Education level	Low/Medium level	8%	50%	42%	100%	43%
	High level	6%	29%	65%	100%	40%
Employment status	Employed / Self-employed	8%	47%	45%	100%	39%
	Unemployed or temporarily not working / inactive	8%	48%	44%	100%	48%
Geographical area	North-East	8%	38%	54%	100%	34%
	South-East	8%	53%	39%	100%	38%
	West	10%	40%	50%	100%	71%
Total		8%	48%	44%	100%	42%

Almost all of the Azerbaijani population rely on media in their own language, albeit to different extents (69% always, 12% often and 12% sometimes) (fig. 13). While all other types of media are used by a minority of people, the country’s media in Russian is the second most frequently consumed media, as named by 45% of the population, followed by foreign media in other languages (35%). National media in other languages and foreign media in Russian are never used by the majority of Azerbaijani people (76% and 70% respectively).

FIGURE 13 – Usage of media in Azerbaijani, 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 always or often use media in the national language (82%), individuals who mostly rely on media in Russian (27%) and those who rely on media in foreign languages (23%).¹³

¹³ The first group includes all individuals who “always or often” use media in Azerbaijani; 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 can also access media in other languages.

Although media in the national language is the most important information source for the majority of the population, female citizens and those living in the north-east and south-east parts of the country are more prone to using this type of media compared to other subgroups. Russian media is more popular among the middle age group (34%), employed people (30%) and those with a higher level of education (37%). People’s media habits seem to be influenced by where they live – Azerbaijanis living in the north part of the country favour Russian language media more (38%); Russian language media is also more popular among the people living in cities with more than 150,000 inhabitants (36%). While nearly a quarter of the Azerbaijani population use media in another foreign language, this media source is especially important for residents of the western part of the country (57%).

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

		Individuals who always or often use media		
		In national language	In Russian	In other foreign language
Settlement size	Equal to or more than 150,000 inhabitants	82%	36%	26%
	Between 20,000 and 150,000 inhabitants	82%	24%	19%
	Less than 20,000 inhabitants	81%	22%	22%
Gender	Male	77%	30%	22%
	Female	86%	24%	24%
Age group	15-34 years	79%	21%	25%
	35-54 years	84%	34%	21%
	55 years & above	82%	27%	20%
Education level	Low/Medium level	81%	25%	22%
	High level	83%	37%	26%
Employment status	Employed / Self-employed	80%	30%	21%
	Unemployed or temporarily not working / inactive	84%	21%	26%
Geographical area	North-East	85%	38%	11%
	South-East	83%	24%	19%
	West	70%	19%	57%
Total		82%	27%	23%

Trust levels towards different media sources are similar to the usage patterns of media: the majority of people trust the country’s media in the national language (70%), while trust levels towards other media sources are quite low and the majority of the population are undecided about it (tab. A4 in Annex). As for trust levels towards different media types, television is by far the most trusted source (70%); the next most trusted media source is the internet, named by almost every second person (48%).

3.3.2. Sources of information about the EU

37% of Azerbaijani residents (of those who are aware about the EU) state that they have seen or heard about the Union in the last three months, as compared to 48% in 2016.

As last year, people with higher levels of education (51%), who live in medium-sized cities (44%) and are employed (41%) are more likely to have recently been exposed to information about the EU.

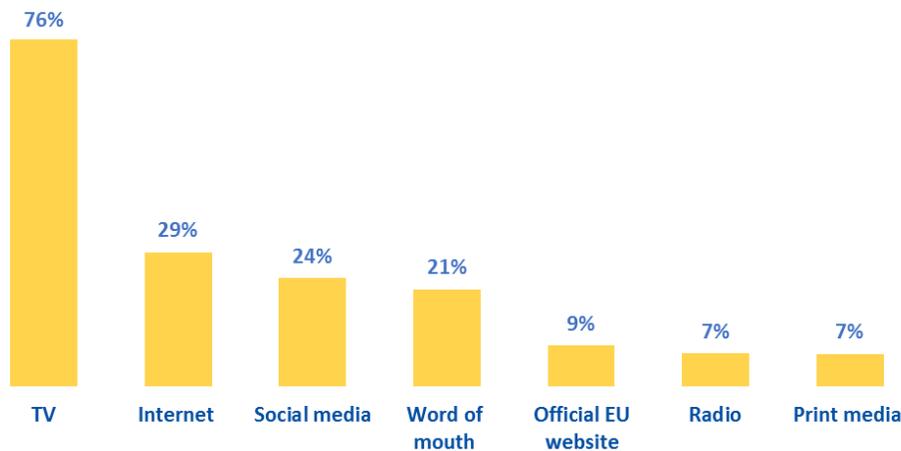
TABLE 10 – Exposure to information about the EU

Q3.2. Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	37%	63%	100%
	Between 20,000 and 150,000 inhabitants	44%	56%	100%
	Less than 20,000 inhabitants	35%	65%	100%
Gender	Male	38%	62%	100%
	Female	36%	64%	100%
Age group	15-34 years	36%	64%	100%
	35-54 years	39%	61%	100%
	55 years & above	35%	65%	100%
Education level	Low/Medium level	35%	65%	100%
	High level	51%	49%	100%
Employment status	Employed / Self-employed	41%	59%	100%
	Unemployed or temporarily not working / inactive	30%	70%	100%
Geographical area	North-East	32%	68%	100%
	South-East	40%	60%	100%
	West	34%	66%	100%
Total		37%	63%	100%

Percentages refer to Azerbaijanis who have heard about the EU

Most of the information recently obtained by people came from television (76%). Almost every third Azerbaijani resident (29%) heard or saw information about the EU through the internet, 24% through social media and 21% through word of mouth. The official EU website, radio and print media accounted for less than 10% of the overall population.

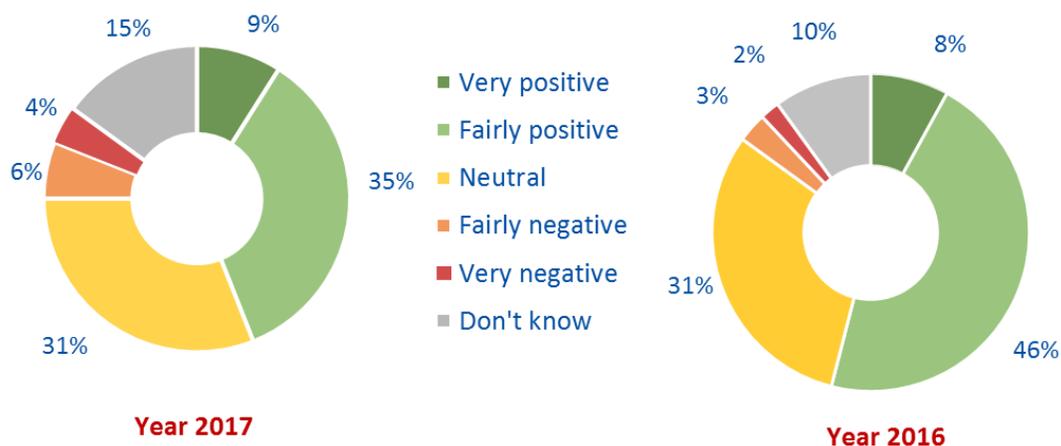
FIGURE 14 – Where or from whom have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)



Percentages refer to Azerbaijanis who have heard about the EU

When asked to evaluate the image of the EU in the national media, 44% of people felt that the national media represented the European Union very positively (9%) or fairly positively (35%). Only one in ten people think that the EU’s image in the national media is negative (10%), while the share of those considering it to be neutral is quite high (31%). As compared to 2016, the share of people who think that the EU is positively represented in the national media has decreased by 10 per cent (fig. 15).

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



Percentages refer to Azerbaijanis who have heard about the EU

Those who believe that the EU is positively represented in the national media usually come from large or medium-sized cities (50% and 55% respectively) and are young (49%) and highly educated (51%) (tab. 11). On the other hand, western residents (38%), over 55s, residents of small settlements and unemployed people (each 21%) find it difficult to express an opinion on the EU's representation in the national media.

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	Equal to or more than 150,000 inhabitants	50%	37%	7%	6%	100%
	Between 20,000 and 150,000 inhabitants	55%	26%	5%	14%	100%
	Less than 20,000 inhabitants	36%	28%	15%	21%	100%
Gender	Male	43%	28%	15%	14%	100%
	Female	44%	34%	6%	16%	100%
Age group	15-34 years	49%	26%	12%	13%	100%
	35-54 years	43%	33%	10%	14%	100%
	55 years & above	31%	41%	7%	21%	100%
Education level	Low/Medium level	42%	31%	10%	17%	100%
	High level	51%	30%	12%	7%	100%
Employment status	Employed / Self-employed	44%	32%	12%	12%	100%
	Unemployed or temporarily not working / inactive	43%	29%	7%	21%	100%
Geographical area	North-East	47%	34%	8%	11%	100%
	South-East	48%	34%	7%	11%	100%
	West	18%	13%	31%	38%	100%
Total		44%	31%	10%	15%	100%

Percentages refer to Azerbaijanis who have heard about the EU

According to every second Azerbaijani resident (49%), the information they read, watch or access online helps them (very much or fairly) to have a better understanding of the European Union. 41% of people disagree with this notion and think that the information does not help them to better understand the EU.

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

28% of Azerbaijani citizens claim they access information on the European Union very frequently or frequently (fig. 16). This figure has increased by 9 per cent compared to 2016, reducing the share of people who never access this type of information from 59% to 47%.

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



Percentages refer to Azerbaijanis who have heard about the EU

The highest share of people who never look for information on the EU can be found in western (61%) and north-eastern (54%) settlements and average and small-sized cities (56 and 50% respectively), as well as among people over 55 (55%), the unemployed (56%) and those with low/medium levels of education (48%) (tab. 12).

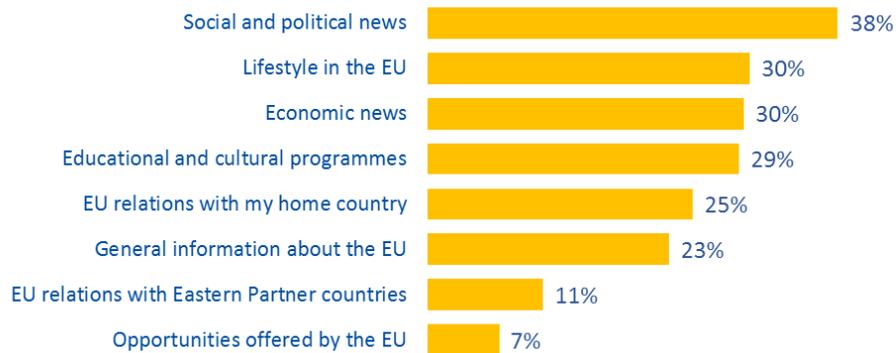
TABLE 12 – Accessing information about the EU

Q3.1. How often do you look for/access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement size	Equal to or more than 150,000 inhabitants	37%	24%	39%	100%
	Between 20,000 and 150,000 inhabitants	25%	19%	56%	100%
	Less than 20,000 inhabitants	22%	28%	50%	100%
Gender	Male	30%	25%	45%	100%
	Female	25%	26%	49%	100%
Age group	15-34 years	28%	32%	40%	100%
	35-54 years	28%	21%	51%	100%
	55 years & above	27%	18%	55%	100%
Education level	Low/Medium level	26%	26%	48%	100%
	High level	39%	24%	37%	100%
Employment status	Employed / Self-employed	31%	27%	42%	100%
	Unemployed or temporarily not working / inactive	22%	22%	56%	100%
Geographical area	North-East	29%	17%	54%	100%
	South-East	30%	29%	41%	100%
	West	17%	22%	61%	100%
Total		28%	25%	47%	100%

Percentages refer to Azerbaijanis who have heard about the EU

The majority of people who search for information about the EU access information in their national language (84%), while 8% use Russian and 5% English. The most commonly searched for information about the European Union concerns social and political news (38%), while up to a third of the population search for information about the lifestyle in the EU, economic news and information about educational and cultural programmes (fig. 17). Only one in four people are interested in finding out more about EU relations with their Azerbaijan and search for general information about the EU.

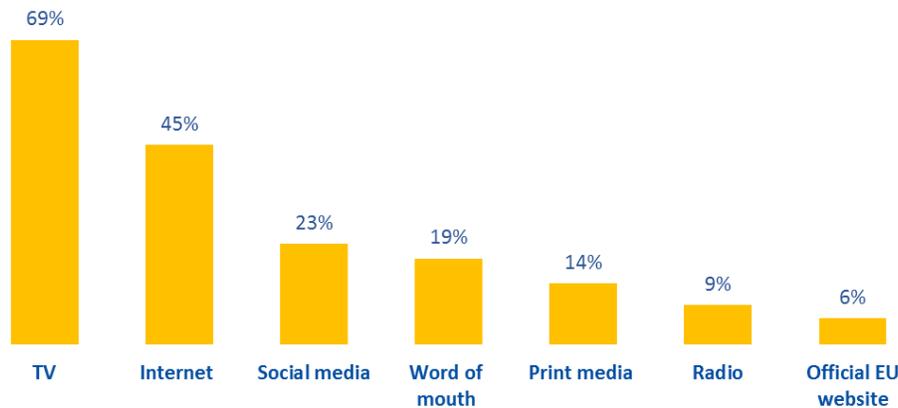
FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)



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

While passive exposure to information about the EU mostly stems from television (76%) and to some extent from the internet (29%), social media (21%) and word of mouth (21%), those actively searching for/accessing information still rely on television channels (69%), but the importance of the internet is higher in this case (45%) (fig. 18). Only 6% visit the official EU website to find information about the EU.

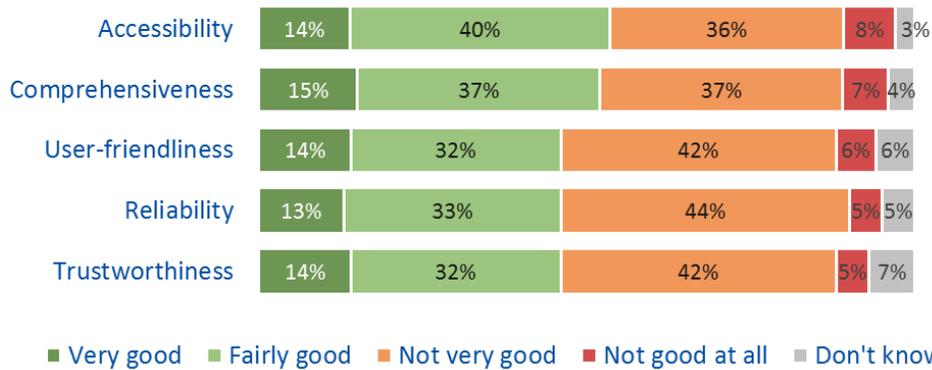
FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)



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

Slightly more than half of Azerbaijani residents who search for information about the EU rate the information as being accessible (very – 14%; fairly – 40%) and comprehensive (very – 15%; fairly – 37%) (fig. 19). Almost the same share of people think that information is user-friendly, reliable and trustworthy (each 46%).

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



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

It is worth noting that every fifth Azerbaijani (21%) – out of those who have heard about the EU – has used EU informational websites¹⁴ at least once. The Facebook profile of the European Union is the most visited EU website (15% of the population) and all other sources are used by about 5% of people or less.

3.3.3. Sources of information and attitude towards the EU

As in section 3.3.1, the attitudes of Azerbaijanis 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. People who use word of mouth as a source of information have been assessed separately and the figures for them are presented in Annex - Table A5.

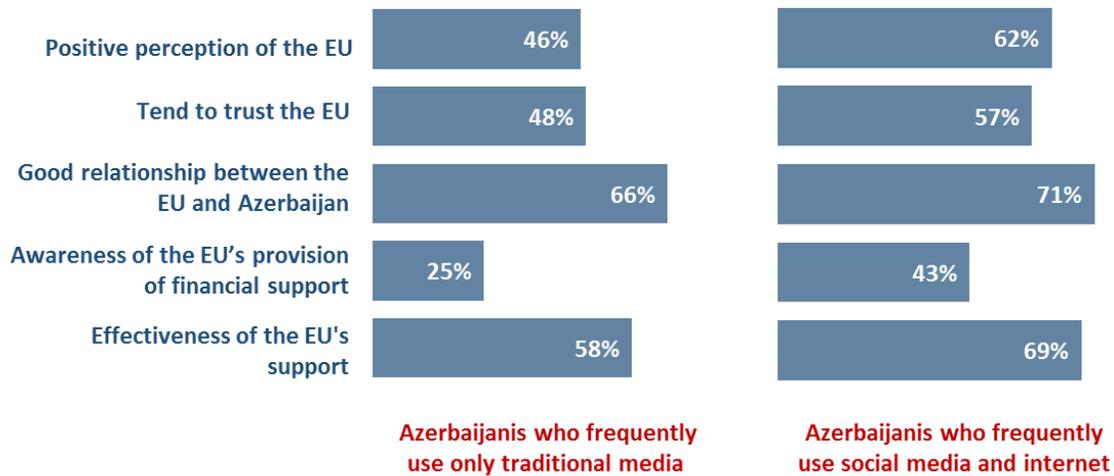
Social media and internet users are in general more positively oriented and trustful towards the EU and are also more informed. Nearly all of them acknowledge the relationship between their country and the EU and 80% rate the EU's support as effective. Trust towards the EU and acknowledgement of the effectiveness of its financial support is about 10 per cent higher among social media and internet users, while the gap in terms of positive attitudes is even higher (16 per cent). No major differences are observed between groups in terms of evaluating relations between the EU and Azerbaijan and a major gap emerges in terms of awareness of the EU's financial support – only every fourth traditional media user (25%) is aware of the financial support provided to Azerbaijan by the EU, while this figure goes up to 43% among social media and internet users¹⁵.

The profile of Azerbaijanis who are frequent users of word of mouth as a source of information tends to be positioned between those who rely on traditional media and social media and internet users.

¹⁴ EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

¹⁵ More details are provided in Annex, Table A5.

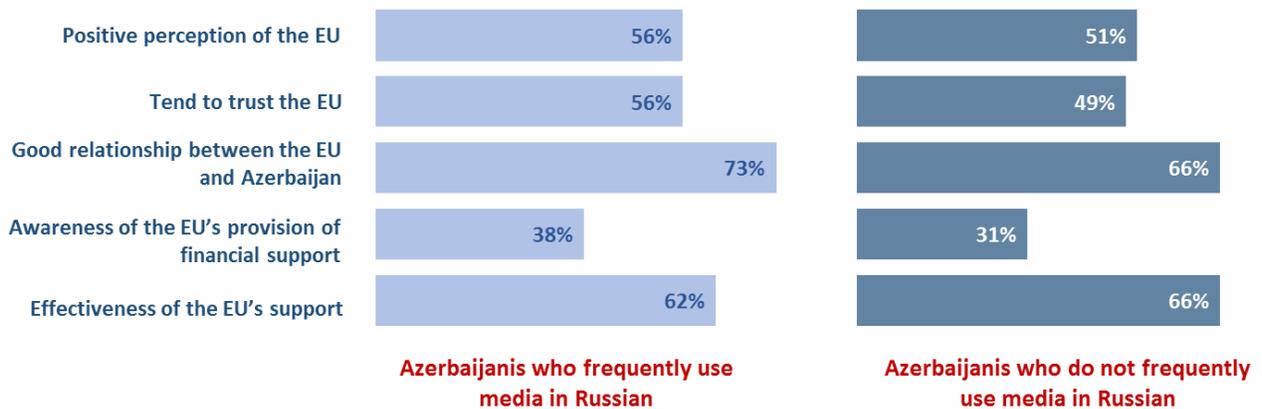
FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU



Percentages refer to Azerbaijanis who have heard about the EU

Attitudes towards the EU have also been assessed by comparing the people that frequently use media in Russian against those who do not (fig. 21).¹⁶ No major differences can be observed between groups in terms of evaluation of the effectiveness of the EU's financial support and positive perceptions of the EU (4-5 points, respectively); however, for the rest of the parameters, such as trust towards the EU, the relationship between the EU and Azerbaijan and awareness of the EU's financial support, Russian media users tend to be slightly more positively oriented.

FIGURE 21 – Attitudes towards the EU among frequent/non-frequent users of media in Russian



Percentages refer to Azerbaijanis who have heard about the EU

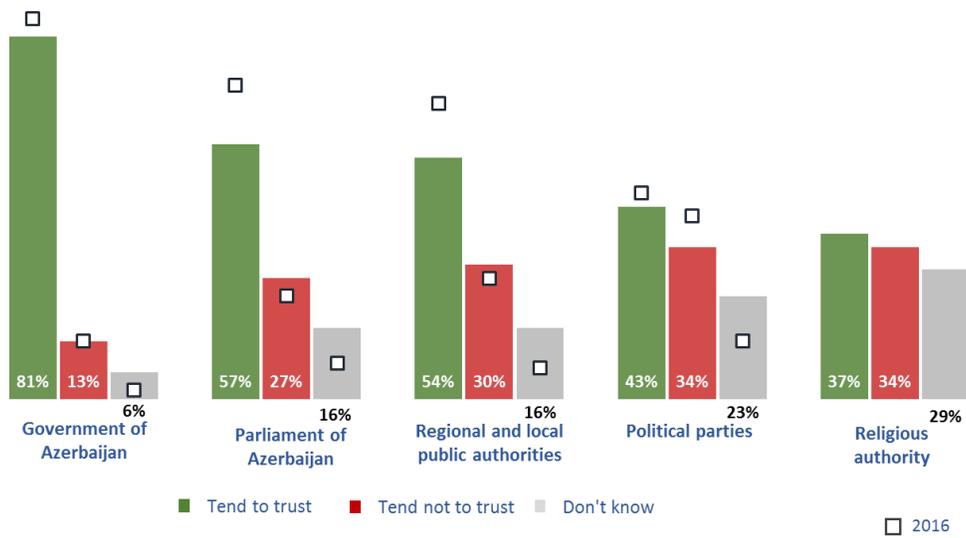
¹⁶ More details are provided in Annex, Table A6.

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

3.4.1. View of Azerbaijan’s current situation

Just as in 2016, the majority of Azerbaijani citizens share a great deal of trust towards the government of the country (81%). Trust towards the parliament and local authorities has however decreased since 2016 and shifted towards the “don’t know” response, but is still above the average and scores 57% and 54% respectively (fig. 22). Political parties, on the other hand, still score the lowest levels of trust (43%) among political institutions. Interestingly, trust towards religious authority (a new variable that was introduced in 2017) is quite low (lower than trust towards any political institutions) and positive and negative attitudes are almost equal (37% and 34% respectively).

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, there has been a slight decrease in the proportion of those who are satisfied (-6 per cent) and around half of citizens (53%) remain dissatisfied with the way democracy works in Azerbaijan (fig. 23). Only every tenth Azerbaijani (9%) is very satisfied with democracy in Azerbaijan.

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 Azerbaijan? (Q4.3)



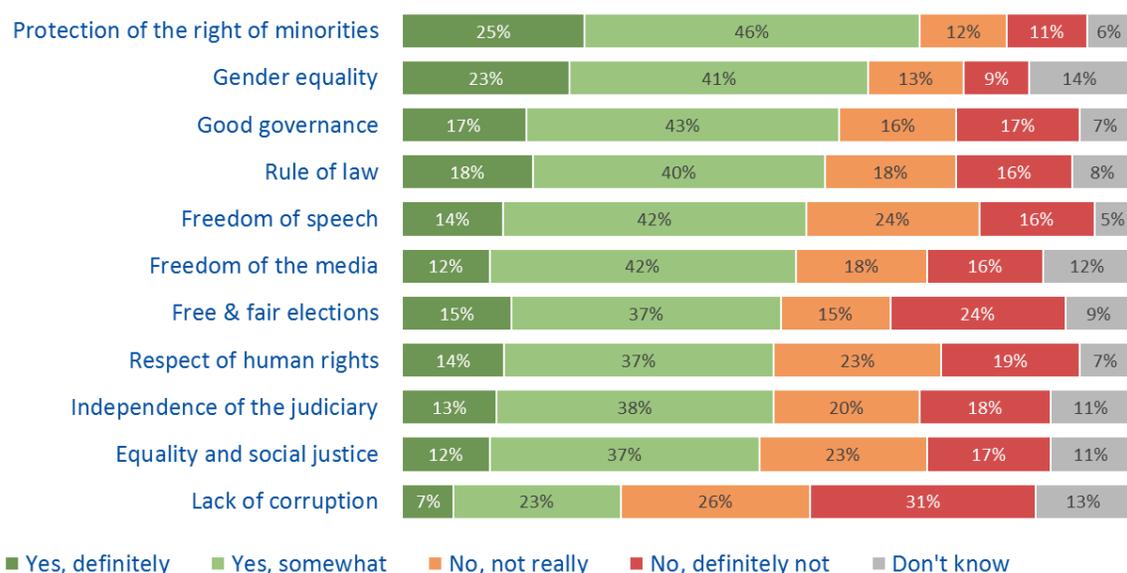
The data shows that dissatisfaction with the level of democracy is higher among males (58%) and especially among people living in the western part of the country (70%). On the other hand, residents of medium-sized cities (57%), highly-educated people (49%) and females (46%) are more satisfied with democracy.

TABLE 13 – Satisfaction with democracy in Azerbaijan

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 Azerbaijan?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	48%	50%	2%	100%
	Between 20,000 and 150,000 inhabitants	57%	40%	3%	100%
	Less than 20,000 inhabitants	35%	58%	7%	100%
Gender	Male	38%	58%	4%	100%
	Female	46%	48%	6%	100%
Age group	15-34 years	41%	53%	6%	100%
	35-54 years	44%	53%	3%	100%
	55 years & above	42%	51%	7%	100%
Education level	Low/Medium level	41%	54%	5%	100%
	High level	49%	48%	3%	100%
Employment status	Employed / Self-employed	43%	53%	4%	100%
	Unemployed or temporarily not working / inactive	41%	53%	6%	100%
Geographical area	North-East	45%	47%	8%	100%
	South-East	46%	51%	3%	100%
	West	23%	70%	7%	100%
Total		42%	53%	5%	100%

The element that is most relevant to Azerbaijan, as believed by the majority of its population, is protection of the rights of minorities (71%), followed by gender equality (64%), good governance (60%) and rule of law (58%). Although positive, the following indicators have lowered compared to 2016: protection of the rights of minorities (76%), gender equality (70%), good governance (66%) and rule of law (70%). Corruption is still deemed the most problematic issue in Azerbaijan (57% do not agree that there is a lack of corruption in the country).

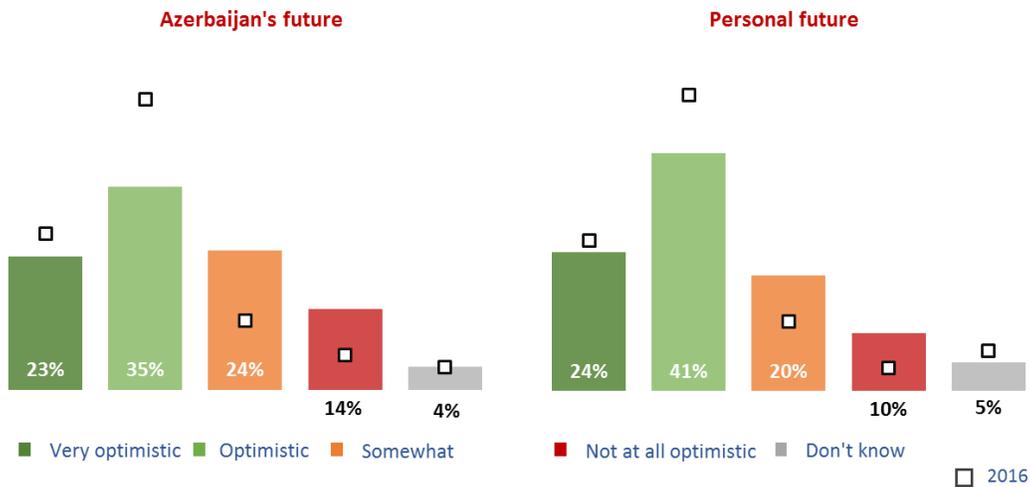
FIGURE 24 – To what extent do you think that the following elements apply in Azerbaijan? (Q4.4)



3.4.2. Future expectations

Optimistic views, be it on a national or personal level, have significantly decreased among Azerbaijanis: in 2016, 77% of the population felt optimistic towards Azerbaijan’s future, as well as their personal future, while optimism towards the country’s future now scores 58%. Although people are more optimistic about their personal future, a decrease of 12 per cent has been observed (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)



It is noteworthy that the highest level of pessimism towards the country’s future was observed among inhabitants of the western part of the country (59%), young people (15-34 years), males and residents of medium and small-sized settlements (each 43%) (tab. 14).

TABLE 14 – Optimism regarding Azerbaijan’s future

Q4.5. How optimistic are you about the future of your country?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	65%	28%	7%	100%
	Between 20,000 and 150,000 inhabitants	55%	43%	2%	100%
	Less than 20,000 inhabitants	53%	43%	4%	100%
Gender	Male	52%	43%	5%	100%
	Female	62%	33%	5%	100%
Age group	15-34 years	53%	43%	4%	100%
	35-54 years	60%	35%	5%	100%
	55 years & above	63%	30%	7%	100%
Education level	Low/Medium level	56%	38%	6%	100%
	High level	65%	34%	1%	100%
Employment status	Employed / Self-employed	56%	39%	5%	100%
	Unemployed or temporarily not working / inactive	59%	35%	6%	100%
Geographical area	North-East	64%	30%	6%	100%
	South-East	60%	36%	4%	100%
	West	36%	59%	5%	100%
Total		58%	38%	5%	100%

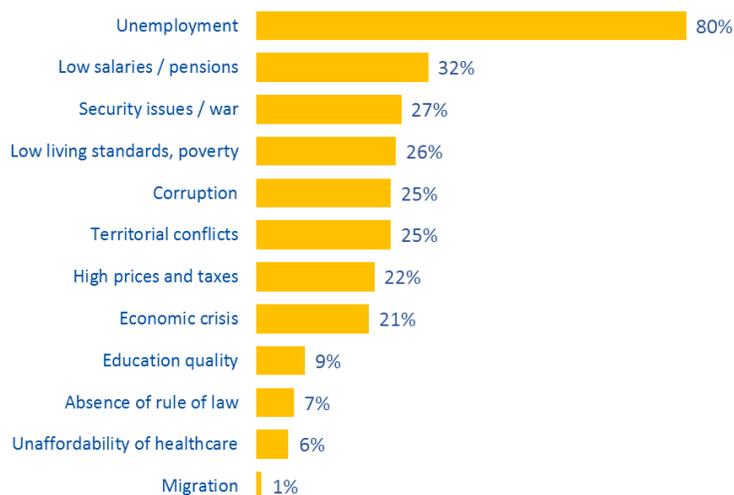
When it comes to their personal futures, unlike their expectations for the country, younger people tend to feel less pessimistic. However, inhabitants of the western part of the country and those residing in medium and small-sized settlements still show higher levels of pessimism (tab. 15).

TABLE 15 – Optimism regarding personal future

Q4.6. How optimistic are you about your personal future?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	72%	24%	4%	100%
	Between 20,000 and 150,000 inhabitants	60%	38%	2%	100%
	Less than 20,000 inhabitants	61%	33%	6%	100%
Gender	Male	63%	32%	5%	100%
	Female	66%	29%	5%	100%
Age group	15-34 years	69%	26%	5%	100%
	35-54 years	63%	33%	4%	100%
	55 years & above	57%	35%	8%	100%
Education level	Low/Medium level	63%	32%	5%	100%
	High level	74%	23%	3%	100%
Employment status	Employed / Self-employed	63%	32%	5%	100%
	Unemployed or temporarily not working / inactive	68%	27%	5%	100%
Geographical area	North-East	66%	26%	8%	100%
	South-East	70%	27%	3%	100%
	West	42%	51%	7%	100%
Total		65%	30%	5%	100%

The most pressing problem for Azerbaijani residents is unemployment (80%), a significantly higher percentage than the next most frequently named problem (low salaries/pensions – 32%). 20% to 30% of people also named security issues / war, low living standards / poverty, corruption, territorial conflicts, high prices and taxes and economic crisis. Quality of education, absence of rule of law, unaffordable healthcare and migration are not among the most frequently cited problems, although better education is an area where the EU should play a greater role according to 40% of the Azerbaijani population (fig. 8).

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

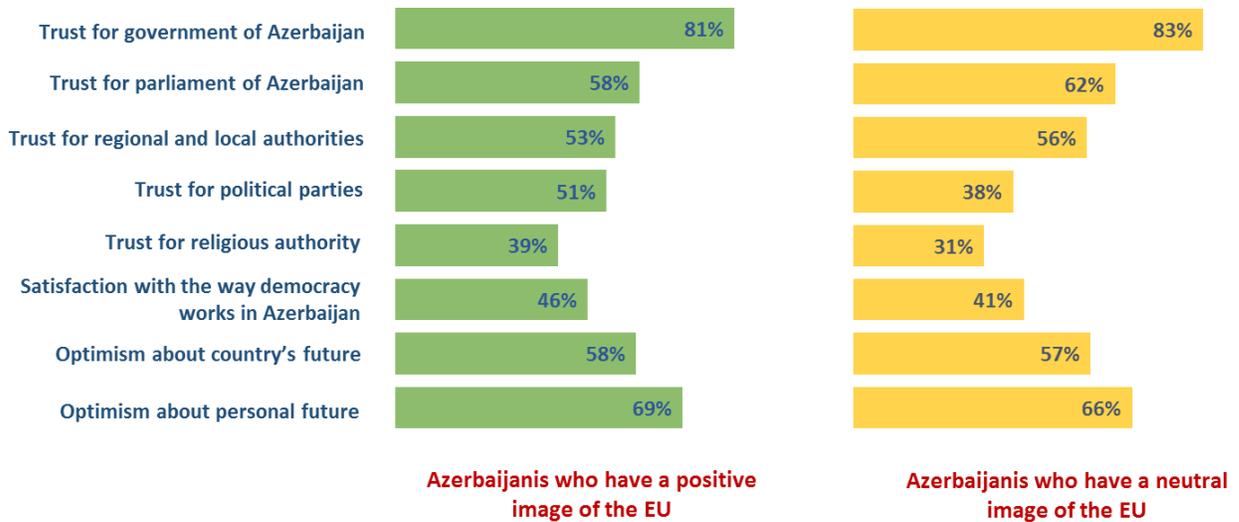


3.4.3. Views of the country and attitude towards the EU: a snapshot

As in section 3.2.2, the views of the country and attitude towards the EU have been analysed according to two main profiles: individuals that have a positive attitude towards the EU and those who are mostly neutral.¹⁷ 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 the country’s future and optimism about personal future.

As shown in figure 27, there are no major differences between groups in terms of trust towards government bodies, although people who are neutral towards the EU express slightly more positive attitude towards the national and local governments and the parliament. Political parties are trusted much more by people positively disposed towards the EU (+13 per cent), as well as by religious authority (+8 per cent)¹⁸. In terms of satisfaction with the way democracy works in Azerbaijan and optimism about the country’s future or personal futures, the two populations do not show any notable differences.

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



Almost everyone, regardless of their attitude towards the European Union, indicates the same pressing problems in Azerbaijan, with unemployment at the top of the list. The only observable difference relates to security issues / war, which is more frequently cited by those with a neutral image of the EU.¹⁹

¹⁷ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

¹⁸ More details on the main findings are provided in Annex, Table A7.

¹⁹ More details on the 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 Azerbaijan 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
More tourism	24%	36%	26%	5%	9%	100%
Improved trade	12%	38%	27%	11%	12%	100%
Improved quality of the healthcare system	10%	32%	25%	18%	15%	100%
Better education	16%	26%	37%	11%	10%	100%
Access to more products and services	9%	32%	33%	12%	14%	100%
Improved democracy	9%	31%	35%	14%	11%	100%
Improved agricultural production	10%	27%	33%	17%	13%	100%
Greater economic development	12%	25%	36%	15%	12%	100%
Better law enforcement	8%	28%	28%	18%	18%	100%
Improved infrastructure	8%	26%	31%	22%	13%	100%
Improved quality of the justice system	8%	21%	26%	20%	25%	100%
Greater employment opportunities	9%	18%	25%	38%	10%	100%
Less corruption	5%	14%	27%	33%	21%	100%

Percentages refer to Azerbaijanis 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
Improve democracy	26%	37%
Promote economic development	24%	43%
Increase tourism	14%	35%
Promote better education	11%	40%
Create greater employment opportunities	8%	33%
Reduce corruption	5%	26%
Improve trade	4%	16%
Improve quality of the healthcare system	2%	18%
Promote access to more products and services	2%	12%
Improve infrastructure	2%	11%
Improve agricultural production	1%	8%
Promote better law enforcement	1%	6%
Improve quality of the justice system	0%	4%

Percentages refer to Azerbaijanis 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	69%	39%
	Tend not to trust	13%	31%
	Don't know	18%	30%
	<i>Total</i>	100%	100%
Relations between the EU and Azerbaijan	Good	82%	64%
	Bad	15%	25%
	Don't know/No relations	3%	11%
	<i>Total</i>	100%	100%
Awareness of financial support by the EU	Yes	44%	25%
	No	21%	26%
	Don't know	35%	49%
	<i>Total</i>	100%	100%
Effectiveness of the EU's support	Effective	74%	48%
	Not effective	20%	43%
	Don't know	6%	9%
	<i>Total</i>	100%	100%

Percentages refer to Azerbaijanis who have heard about the EU

TABLE A4 – Trust towards different types of media

Q3.9. & Q3.10. Which is your level of trust for the following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Television	70%	17%	13%	100%
Internet	48%	13%	39%	100%
Social media	39%	15%	46%	100%
Radio	38%	21%	41%	100%
Print media	31%	23%	46%	100%
Word of mouth	29%	37%	34%	100%
Official EU website	22%	9%	69%	100%
Country's media in national language				
Country's media in national language	70%	18%	12%	100%
Country's media in Russian				
Country's media in Russian	35%	21%	44%	100%
Foreign media in other languages				
Foreign media in other languages	28%	13%	59%	100%
Foreign media in Russian				
Foreign media in Russian	27%	17%	56%	100%
Country's media in other languages				
Country's media in other languages	21%	19%	60%	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)	
		No media	Only traditional media	Social media or internet	Yes	No
Perception of the EU	Positive	36%	46%	62%	53%	53%
	Neutral	29%	31%	26%	27%	30%
	Negative	23%	11%	7%	10%	10%
	Don't know	12%	12%	5%	10%	7%
	Total	100%	100%	100%	100%	100%
Trust towards the EU	Tend to trust	31%	48%	57%	49%	52%
	Tend not to trust	41%	24%	22%	25%	24%
	Don't know	28%	28%	21%	26%	24%
	Total	100%	100%	100%	100%	100%
Relations between the EU and Azerbaijan	Good	64%	66%	71%	68%	68%
	Bad	23%	21%	22%	21%	22%
	Don't know/No relations	13%	13%	7%	11%	10%
	Total	100%	100%	100%	100%	100%
Awareness of financial support by the EU	Yes	26%	25%	43%	30%	36%
	No	37%	21%	25%	26%	23%
	Don't know	37%	54%	32%	44%	41%
	Total	100%	100%	100%	100%	100%
Effectiveness of the EU's support	Effective	65%	58%	69%	65%	64%
	Not effective	26%	32%	26%	33%	25%
	Don't know	9%	10%	5%	2%	11%
	Total	100%	100%	100%	100%	100%

Percentages refer to Azerbaijanis 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	56%	51%
	Neutral	26%	29%
	Negative	12%	10%
	Don't know	6%	10%
	Total	100%	100%
Trust towards the EU	Tend to trust	56%	49%
	Tend not to trust	26%	24%
	Don't know	18%	27%
	Total	100%	100%
Relations between the EU and Azerbaijan	Good	73%	66%
	Bad	21%	22%
	Don't know/No relations	6%	12%
	Total	100%	100%
Awareness of financial support by the EU	Yes	38%	31%
	No	31%	22%
	Don't know	31%	47%
	Total	100%	100%
Effectiveness of the EU's support	Effective	62%	66%
	Not effective	33%	25%
	Don't know	5%	9%
	Total	100%	100%

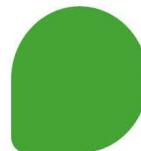
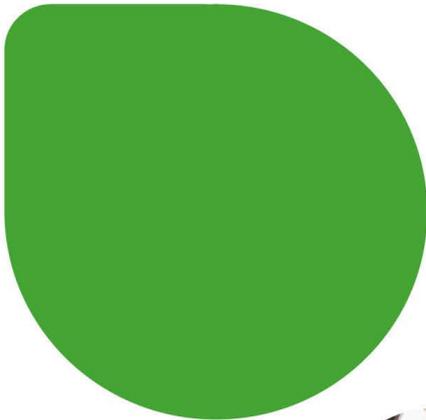
Percentages refer to Azerbaijanis who have heard about the EU

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

		Attitude towards the EU	
		Positive	Neutral
Trust for government of Azerbaijan	Tend to trust	81%	83%
	Tend not to trust	15%	9%
	Don't know	4%	8%
	Total	100%	100%
Trust for parliament of Azerbaijan	Tend to trust	58%	62%
	Tend not to trust	29%	24%
	Don't know	13%	14%
	Total	100%	100%
Trust for regional and local authorities	Tend to trust	53%	56%
	Tend not to trust	35%	23%
	Don't know	12%	21%
	Total	100%	100%
Trust for political parties	Tend to trust	51%	38%
	Tend not to trust	32%	34%
	Don't know	17%	28%
	Total	100%	100%
Trust for religious authority	Tend to trust	39%	31%
	Tend not to trust	35%	30%
	Don't know	26%	39%
	Total	100%	100%
Satisfaction with the way democracy works in Azerbaijan	Yes	46%	41%
	No	51%	56%
	Don't know	3%	3%
	Total	100%	100%
Optimism about country's future	Optimistic	58%	57%
	Pessimistic	40%	38%
	Don't know	2%	5%
	Total	100%	100%
Optimism about personal future	Optimistic	69%	66%
	Pessimistic	29%	30%
	Don't know	2%	4%
	Total	100%	100%

TABLE A8 – Most pressing problems in Azerbaijan

	Attitude towards the EU	
	Positive	Neutral
Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)		
Unemployment	83%	75%
Low salaries / pensions	30%	29%
Corruption	29%	25%
Low living standard, poverty	27%	19%
Security issues / war	25%	39%
Territorial conflicts	24%	28%
Economic crisis	22%	26%
High prices and taxes	20%	25%
Education quality	10%	8%
Absence of rule of law	8%	8%
Unaffordability of healthcare	6%	7%
Migration	1%	1%



Albert House, Quay Place
92-93 Edward Street
Birmingham
B1 2RA
United Kingdom

T: +44 (0) 845 313 7455
F: +44 (0) 845 313 7454

Rue Belliard 12
1040 Brussels
Belgium

T +32 2 743 89 49
F +32 2 732 71 11