

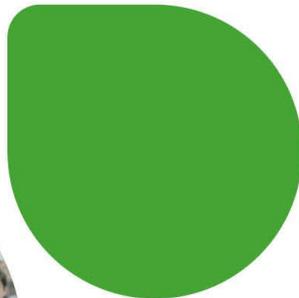
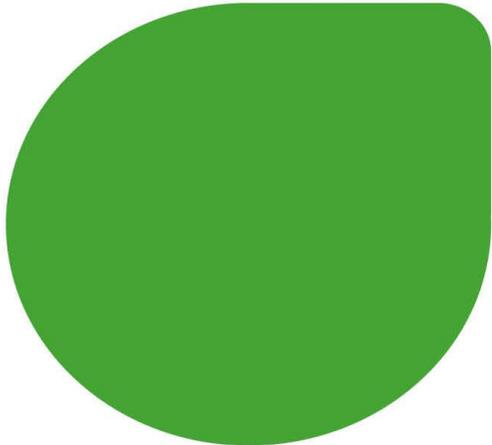
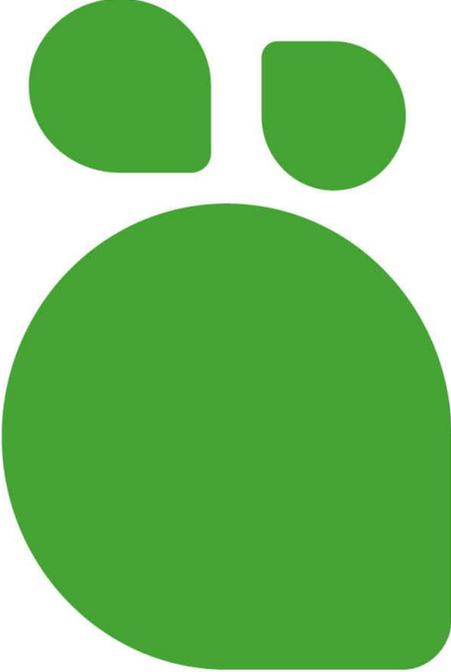
**ANNUAL SURVEY REPORT: ARMENIA**

3<sup>rd</sup> Wave (Spring 2018)

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

June 2018

**#  
STRONGER  
TOGETHER**



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**act**

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

# 1. Background

Between March and April 2018, a third wave of annual surveys was carried out across the six Eastern partner countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of 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 the EaP 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.

The purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have on the EU in general and, in particular, on 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 **3<sup>rd</sup> wave of annual surveys** (spring 2018) conducted in **Armenia**<sup>1</sup> and covers the following broad topics:

- General perceptions of 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

The structure of the report is as follows: **the first section** is dedicated to the perception of citizens of the EU (including their assessment of the relationship between their country and the EU, their awareness of the EU’s financial support and perception of its effectiveness, and their level of trust towards the EU and other foreign institutions); **the second section** is devoted to the analysis of media sources in terms of EU-related general information, both in the national language and other foreign languages; and the **third section** provides an assessment of how citizens view their country’s and their personal future, as well as their main concerns. In order to gather a more comprehensive view, a **fourth section** was also included, which is dedicated to profiling citizens with a positive attitude and citizens with a neutral stance towards the EU. Attitudes were profiled in socio-demographic terms and against selected indicators from previous sections.

The third wave also saw the introduction of a new set of questions, targeted at gaining greater insights into how the EU is perceived by citizens. Respondents were asked to rate their agreement with a set of statements that touched upon perceived myths about the EU.

This document is an analysis of the results of the 3<sup>rd</sup> wave of the survey, which also provides comparisons between the findings of the 2018, 2017 and 2016 surveys where relevant.

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<sup>1</sup> A similar report has been produced for each EaP country. Additionally, a macro-area report is available which compares the results across the region.

## 2. Research methodology in brief

The survey was conducted in March 2018, following the same methodology adopted in the previous rounds of data collection (Spring 2017 and 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 stratified by unit size, expressed in terms of population, level of urbanisation and geographical area. Three groups of settlements<sup>2</sup> and three areas<sup>3</sup> 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 age<sup>4</sup> 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 walk<sup>5</sup> 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. The calibration variables were the same as those used in the previous wave (settlement size, gender, age, employment status and geographical area, education level, religious faith and mother tongue).

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<sup>2</sup> 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.

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

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

<sup>5</sup> 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 of the EU*

- Nearly half (48%) of Armenian citizens have a positive image of the European Union (EU), 36% feel neutral about it and only 8% hold a negative view. The situation has seen no change compared to 2017 and, since 2016, only a minimal shift from negative to positive views has been recorded.
- At a personal level, peace, security and stability is the most important value for Armenians – a view shared by 59% of citizens and 77% of citizens ‘strongly’ or ‘very strongly’ associate peace, security and stability with the EU.
- Over three quarters of Armenians who have heard of the EU ‘strongly’ or ‘very strongly’ associate it with individual freedom (87%), economic prosperity (86%), human rights (86%), freedom of speech (86%), respect for other cultures (85%), rule of law (82%), freedom of religion (81%) and of the media (79%) and democracy (76%). However, only 48% of the population are convinced that the EU fosters the preservation of traditional values in their society.

### *EU relations with Armenia and awareness of EU financial support*

- Despite Armenia’s membership in the Eurasian Economic Union (EEU), the EU is the most trusted institution with 70% of Armenians trusting it. This is the highest figure recorded in the past three years. Trust in the EEU remains stable, at 48%. NATO has the lowest level of trust, with almost a quarter (24%) of Armenians not trusting it.
- Trust towards the EU is mirrored by the opinion of relations between Armenia and the EU. 80% of Armenians (up 4% compared to 2017) describe them as ‘fairly good’ (71%) or ‘very good’ (9%). The EU is also perceived as an independent actor in foreign relations by 58% of the population.
- Acknowledgement of the EU’s financial support has increased by 7 percentage points since 2016 and 69% of citizens know that the EU provides financial support to Armenia. 66% of citizens consider the EU’s support to be effective and 43% know about specific EU-funded programmes in Armenia, particularly in the fields of education (36%), agricultural and rural development (31%), and health and medicine (28%).
- Around half of the citizens who have heard of the EU believe that the Russian Federation provides more financial support to their country than the EU does (up 10% since 2017) and another 20% are convinced that the support provided by the two institutions is almost the same (down 6% since 2017).
- The main areas in which citizens feel the country has ‘strongly’ or ‘very strongly’ benefitted from the EU’s support are tourism (68%), the justice system (63%), infrastructure (59%), healthcare (59%), education (58%), access to products and services (56%), trade (51%) and democracy (51%). The main areas which according to citizens require more support from the EU are economic development (42%), healthcare (37%), fight against corruption (34%) and education (30%).

### *Media usage as sources of information*

- Television remains the most popular source of information in Armenia – 90% of the population watch it – followed closely by ‘word of mouth’, on which 79% of the population rely. The usage of the Internet (71%) and social media (used by 60% overall) is also widespread among the population.
- Nearly all individuals – 49% ‘always’, 24% ‘often’ and 18% ‘sometimes’ – use national media in Armenian. The usage of foreign or national media in Russian is also widespread: 55% and 63% of the population respectively use them. One in three individuals also use media in other foreign languages.

### *Sources of information about the EU*

- Over one in three Armenians claim to have heard about the EU in the past three months (36%). This indicator has recorded a 7% increase since 2017; nevertheless, it is not yet back at 2016 levels, when around half of the population said they had heard about the EU.
- Television is the main source of passive exposure (60%), followed by new media – such as the Internet (36%) and social media (17%). 16% of passive exposure stems from ‘word of mouth’.
- Nearly 60% felt that national media presented the European Union positively (9% very positively, 50% fairly positively). This figure has increased by 11% since 2017.
- ‘Frequent’ or ‘very frequent’ access to information on the EU has recorded an increase in line with the historical trend (24% versus 14% in 2017 and 12% in 2016). 44% of citizens never look for/access any information on the EU (down from 56% in 2017).
- Compared to 2017, more Armenians seem interested in the EU’s relations with their country (21%, up 10% since last year) and the EaP countries in general (14%, up 10% since last year). Social and political news have also recorded an increase in interest and 33% Armenian looked for it in 2017.
- The quality of EU-related information was rated quite positively by most active searchers: 81% rated it as accessible, 78% as user-friendly, 69% as comprehensive, 68% as reliable and 64% as trustworthy.

### *View of Armenia’s current situation*

- Armenians have a very low level of trust in their institutions and the level of trust has overall decreased at the expense of more negative views. Currently, nearly 30% of individuals trust the Government or regional and local public authorities, while less than 20% trust the Parliament and the political parties. Religious authority is also trusted by only a third (34%) of citizens.
- Accordingly, 70% of the population are dissatisfied with the way democracy works in their homeland – with 45% “absolutely dissatisfied” (up from 38% in 2017).
- It therefore comes as no surprise that 64% of Armenians are not optimistic about the future of their country and that the level of pessimism has intensified in the country since 2016 (14% increase). Citizens’ expectations for their personal futures are, on average, more positive and more stable, though a slight decrease in optimism has also been recorded since 2017 (60%, down 5% since last year).
- Unemployment is still the most pressing problem for half of the population, although the indicator has decreased by 8% since 2017. Security concerns have also lowered (from 22% to 14%) and low living standards and poverty are now the second most pressing issue (27% of the population, up 7% since 2017).

### *Profiling attitudes towards the EU: positive versus neutral*

- EU supporters – who represent 48% of Armenians – are equally spread among all socio-demographic groups, and their make-up closely matches that of the general population, with a very slight preference for younger (44%), highly educated (23%) and employed/self-employed individuals (49%).
- Neutrally oriented citizens – who represent 36% of the population – have clearer characteristics compared to EU supporters: 58% are women, 81% have a low to medium level of education, 57% are unemployed/inactive and 50% live in small settlements. As for geographical residence, they seem to be more likely to live in the south of the country (26%) than positively oriented individuals.
- EU supporters have been slightly more exposed to information about the EU and they are also more frequent users of national media than the general population. Neutrally oriented individuals have been comparatively less exposed to EU-related information and are nearly twice as likely not to access any information on the Union than EU supporters.
- If actively searching for EU-related information, 70% of EU supporters prefer to do so in their national language; one in five individuals search in Russian and one in ten in English (a slightly higher proportion than among the general population). Holders of a neutral stance are more reliant on media in their national language (79%), and less reliant on media in Russian (10%).
- EU supporters tend to have greater levels of confidence in the EU and all foreign institutions, and to be more optimistic regarding their country's future than the general population. Neutrally oriented individuals share exactly the same level of trust in the EU as EU supporters, but their level of trust in other institutions is lower, particularly their trust in the EEU (43% distrust it).
- When assessing the relations between Armenia and the EU, the awareness and the effectiveness of the EU's financial support, neutral citizens appear to be not so familiar with the issues and, in general, tend to be more critical than EU supporters, who are definitely more positive than the general population.
- Positively oriented individuals share exactly the same concerns as the general population, namely unemployment, low living standards and poverty, low salaries and pensions, migration and corruption, although they seem slightly less concerned about unemployment. They also seem more interested in the relations between Armenia and the EU, whereas neutral citizens seem more focused on the opportunities that the EU could offer them.

## 3.2. Perceptions of the European Union

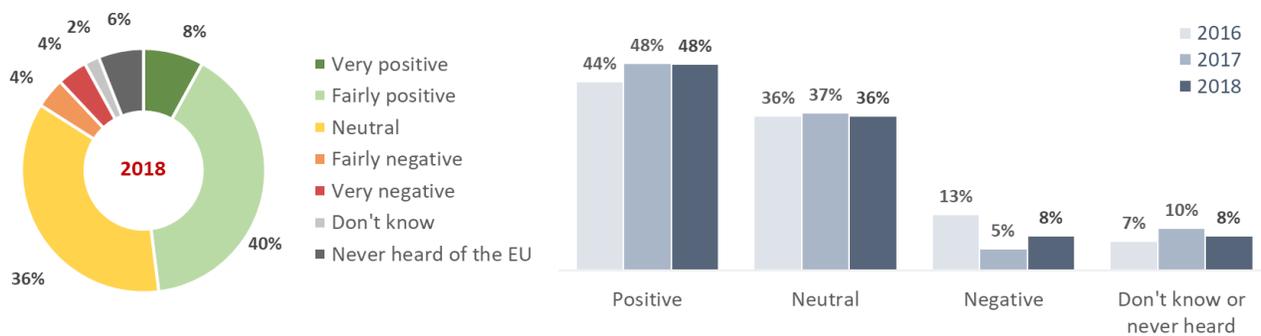
Armenia has a policy of complementariness and maintains positive relations with both Russia and the EU. Although no change was recorded in the general perception of the EU since 2017, more citizens in 2018 view positively the relations between their country and the European Union, which is the most trusted foreign institution. 60% of Armenians consider it an independent actor in foreign policy and 77% link it with peace, security and stability – their most important personal values. Awareness of the EU’s financial support has also increased; still, half of the population believe that the Russian Federation provides more financial support to Armenia than the EU (up 10% since 2017) and another 20% almost the same amount. In fact, over 40% of the population would like the EU to further support economic development in the country.

This section looks at how Armenia’s citizens perceive the EU’s image and their opinion about the benefits of the EU’s financial support, also compared with the role of other foreign institutions.

### 3.2.1. General perceptions of the EU

Nearly half (48%) of Armenian citizens have a positive image of the EU, 36% feel neutral about it and only 8% hold a negative view. The situation has witnessed no change compared to 2017 and only a minimal shift from negative to positive views has been recorded since 2016. Likewise, the share of Armenians who have never heard of the EU or did not provide a definite answer is in line with the historical trend – and steady at around 10%. Older citizens, residents of the south and of small settlements are more likely to have no awareness of the EU and be less positive about it.<sup>6</sup>

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



At a personal level<sup>7</sup>, peace, security and stability is the most important value for Armenians – a view shared by 59% of citizens and 77% of citizens ‘strongly’ or ‘very strongly’ associate peace, security and stability with the EU (up 6% compared to 2017). In addition, around 80% of Armenians who have heard about the EU ‘strongly’ or ‘very strongly’ associate it with economic prosperity, human rights, rule of law, individual freedom, freedom of speech, democracy, respect for other cultures, freedom of religion and of the media. In line with past waves, absence of corruption continues to collect a comparatively lower level of positive associations, yet 55% of individuals still link it with the European Union (this figure was 53% in 2017).<sup>8</sup> The situation is also mainly unchanged with regard to the assessment of the most important personal values and, alongside peace, security and stability, most Armenians chose economic prosperity (44%) and human rights (29%).

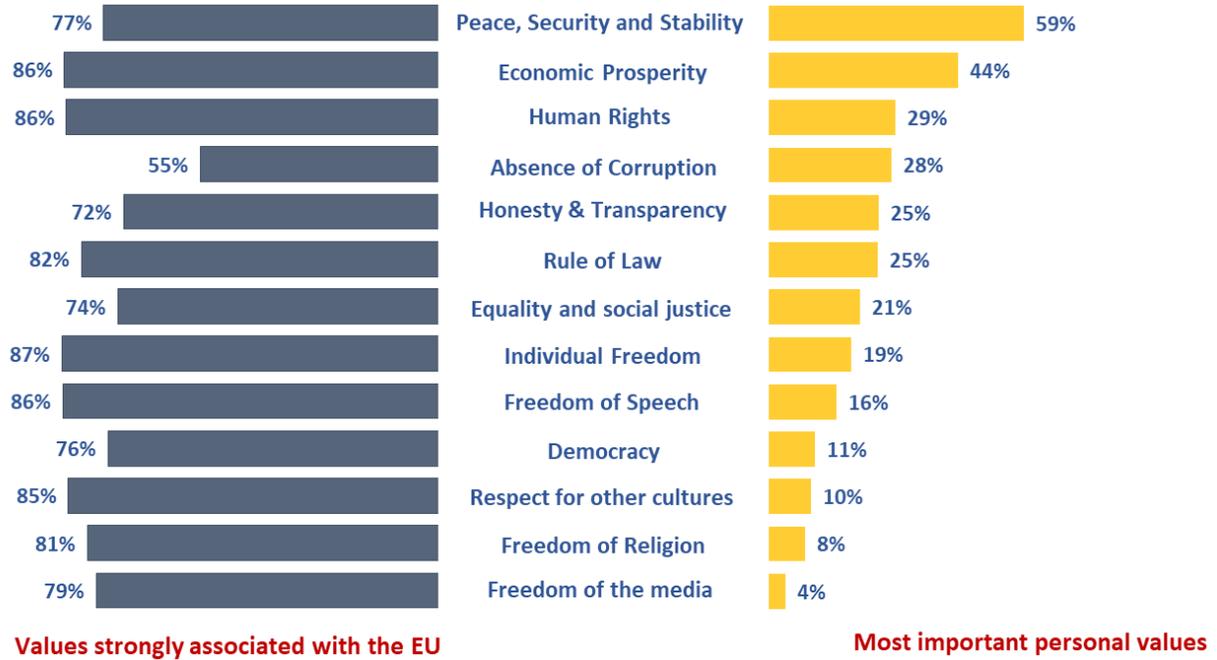
<sup>6</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 1.

<sup>7</sup> Respondents were asked to choose and rank the three most important personal values from a list of 13 items. See also Tab. 3 in Annex for more details on values associated with the EU.

<sup>8</sup> More details are provided in Annex – Table 2.

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

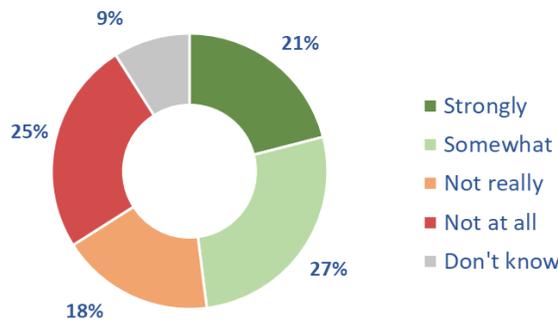
*(Percentages refer to Armenians who have heard of the EU)*



When asked specifically if the EU fostered the preservation of traditional values in their society, Armenians were ambivalent: Almost half ‘strongly’ (21%) or ‘somewhat’ (27%) agreed, whereas 43% thought that the statement did ‘not really’ (18%) or ‘not at all’ (25%) match their feelings.<sup>9</sup>

**FIGURE 3 – ‘The EU fosters the preservation of traditional values in our society’.**  
**To what extent do you agree with this statement about the EU?**

*(Percentages refer to Armenians who have heard of 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. One in four Armenians did not answer the question, either because it was too hard to answer or they had nothing to say. Positive associations mostly revolved around economic prosperity, rule of law, freedom, democracy and

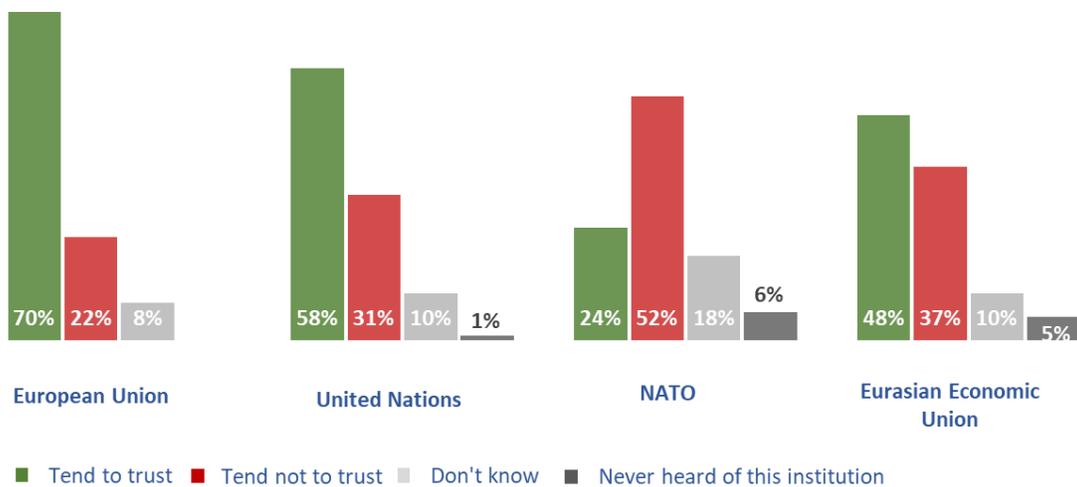
<sup>9</sup> The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (strongly, somewhat, not really, not at all, don't know): “the EU fosters the preservation of traditional values in our society”, “the EU provides tangible benefits to citizens in their everyday lives”, “the EU is committed to fighting corruption”, “the EU is an independent actor in foreign relations” and “integration with the EU increases country's security and stability”.

development and progress (19%, 12%, 10%, 9% and 7% respectively). As for negative perceptions (3% of the population), most individuals said they do not believe in the EU (2%) or cited its moral decline (1%).

Armenia has an international policy of complementariness and maintains positive and friendly relations with both Russia, and the West – including the United States and the European Union. In addition to being a member of the Eurasian Economic Union, Armenia is working towards deepening its political and economic ties with the EU; in November 2017, it signed a new Comprehensive and Enhanced Partnership Agreement with all EU Member States. Armenia is also a member of NATO, the United Nations, and International Monetary Fund/World Bank. Among all these, the European Union is the most trusted foreign institution, with 70% of the population tending to trust it. **This is the highest figure recorded in the past three years and also coincides with a reduction by half in ‘don’t know’ responses.** Figures for both the United Nations (58%) and the EEU (48%) are consistent with 2017 findings; whereas NATO has the lowest levels of trust, with less than 25% of Armenians oriented towards trusting it (down 11% since 2017).<sup>10</sup>

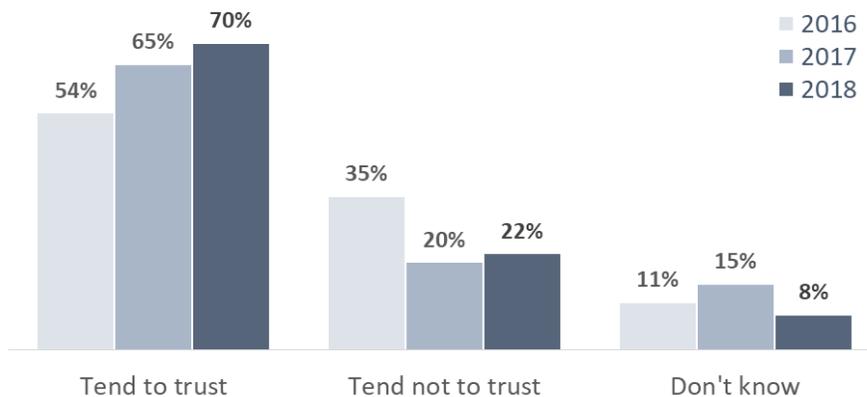
**FIGURE 4 – Trust towards different institutions (Q2.11)**

*(Percentages refer to Armenians who have heard of the EU)*



**FIGURE 5 – Trust towards the EU (Q2.11)**

*(Percentages refer to Armenians who have heard of the EU)*



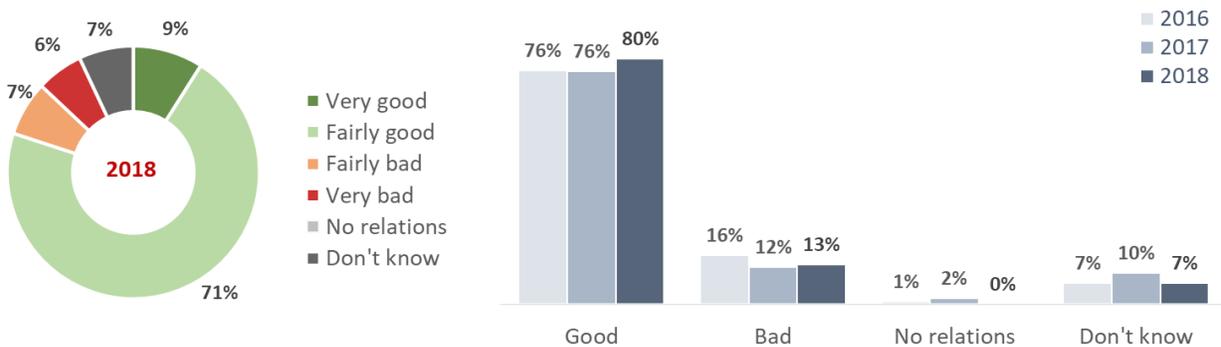
<sup>10</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 3.

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

Trust towards the EU is mirrored by the opinion of relations between Armenia and the EU. 80% of Armenians (up 4% compared to 2017) describe them as fairly good (71%) or very good (9%). Negative opinions were recorded for 13% of individuals, whereas 7% did not answer the question. The opinion on the issue seems to be linked to both gender and age: women tend to be more positive than men (83% versus 76%), just as younger and middle-aged individuals are more optimistic than those aged over 55 (83% for 15-34 year-olds, 85% for 35-54 year-olds and 67% for those over 55). Older individuals are also more likely not to hold a definite opinion on the issue and are the socio-demographic group with the highest share of ‘don’t know’ responses (14%).<sup>11</sup>

**FIGURE 6 – ‘In general, how would you describe the relations that the European Union has with your country?’ (Q2.4)**

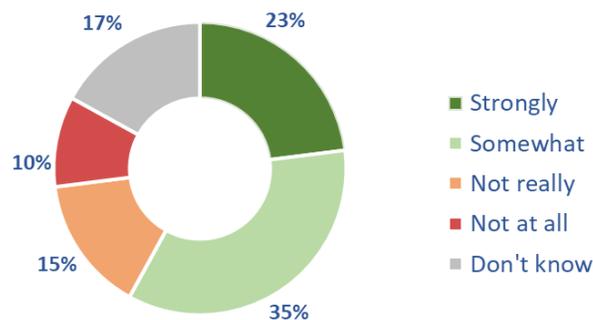
(Percentages refer to Armenians who have heard of the EU)



When asked if they perceived the EU as an independent actor in foreign relations, 60% of Armenians ‘strongly’ (23%) or ‘somewhat’ (35%) agreed with the statement, with only one in four ‘not really’ (15%) or ‘not at all’ (10%) agreeing with it. However, it should be noted that 17% of citizens did not answer the question.

**FIGURE 7 – ‘The EU is an independent actor in foreign relations’. To what extent do you agree with this statement about the EU?**

(Percentages refer to Armenians who have heard of the EU)



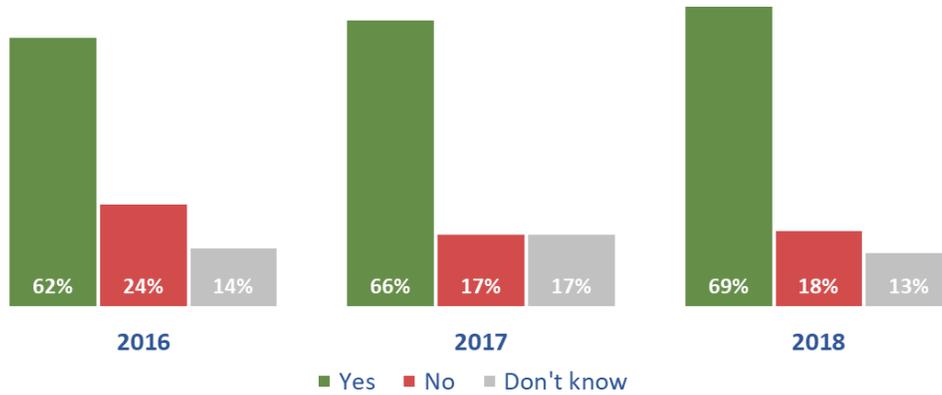
Acknowledgement of the EU’s financial support has seen an increase in 7 percentage points since 2016 (up 4% in 2017 and 3% in 2018): 69% of citizens currently know that the EU provides financial support to Armenia. Last year, the increase was linked to a drop in the proportion of Armenians who did not recognise the EU’s

<sup>11</sup> More details on the distribution according to the main socio-demographic characteristics are provide in Annex – Table 4.

financial support; this year it is associated with a slight fall in the share of ‘don’t know’ responses. However, 13% of citizens are still uninformed and, particularly, residents of the south, where one in five answered, ‘don’t know’ – the highest percentage recorded in the country.<sup>12</sup>

**FIGURE 8 – ‘As far as you know, does the European Union provide Armenia with financial support?’ (Q2.5)**

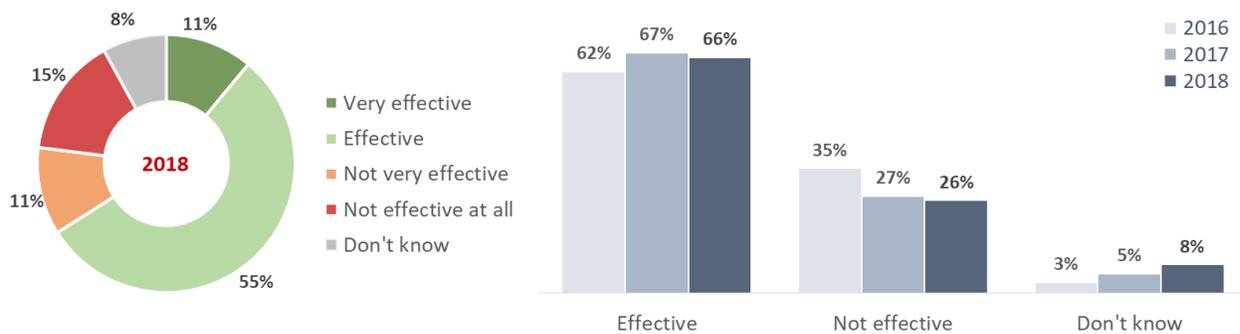
*(Percentages refer to Armenians who have heard of the EU)*



The public opinion on the effectiveness of EU’s financial support remains stable since 2017: 66% of Armenians consider it effective, 26% not effective and 8% did not provide a definite answer. Residents of the north (79%), younger individuals (73%) and women (69%) expressed, on average, a more positive opinion, whereas more criticism came from men (35%) and residents of the capital city (40%).<sup>13</sup>

**FIGURE 9 – ‘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)*



43% of those who are aware of the EU’s financial support know about specific EU-funded programmes in Armenia – a strong increase from 2017 (11 percentage points). Highly educated individuals (56%), residents of medium-sized cities (56%) and men (47%) are, on average, more informed than other population sub-groups.<sup>14</sup>

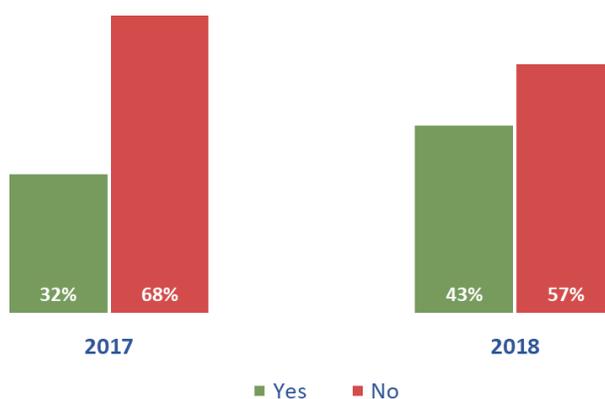
<sup>12</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 5.

<sup>13</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.

<sup>14</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 7.

**FIGURE 10 – ‘Do you know of any specific programmes financed by the European Union in Armenia?’ (Q2.6)**

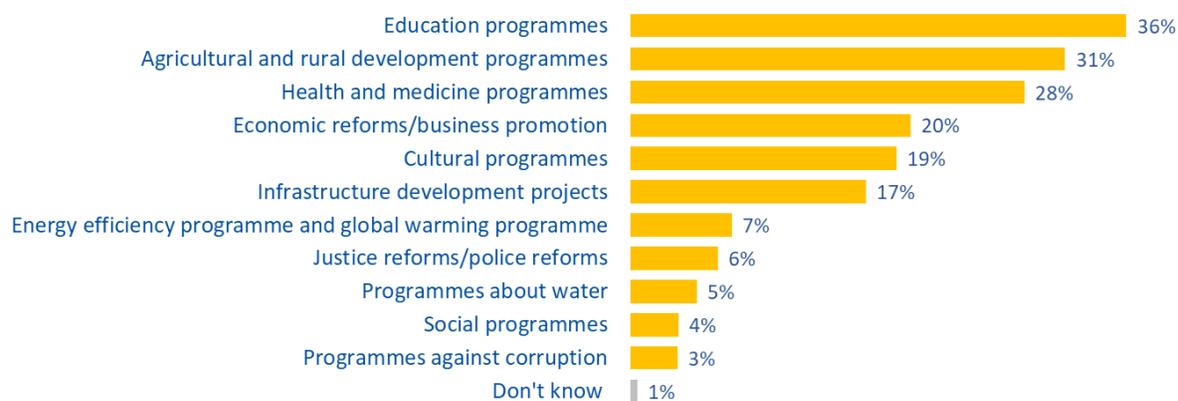
*(Percentages refer to Armenians who were aware of the EU’s financial support)*



The most well-known EU-financed programmes in Armenia relate to the field of education, agricultural/rural development and health/medicine (36%, 31% and 28% respectively). Around one in five Armenians are also aware of programmes relating to the areas of economic reforms/business promotion (20%), culture (19%) and infrastructure/development (17%). All other programmes are each known by less than 10% of the population. Around 6% of Armenians have personally been (or know someone who has been) involved in recent EU-funded projects (this figure was 7% in 2017).

**FIGURE 11 – ‘Which specific programme(s) do you know?’ (Q2.6.1, multiple answers possible)**

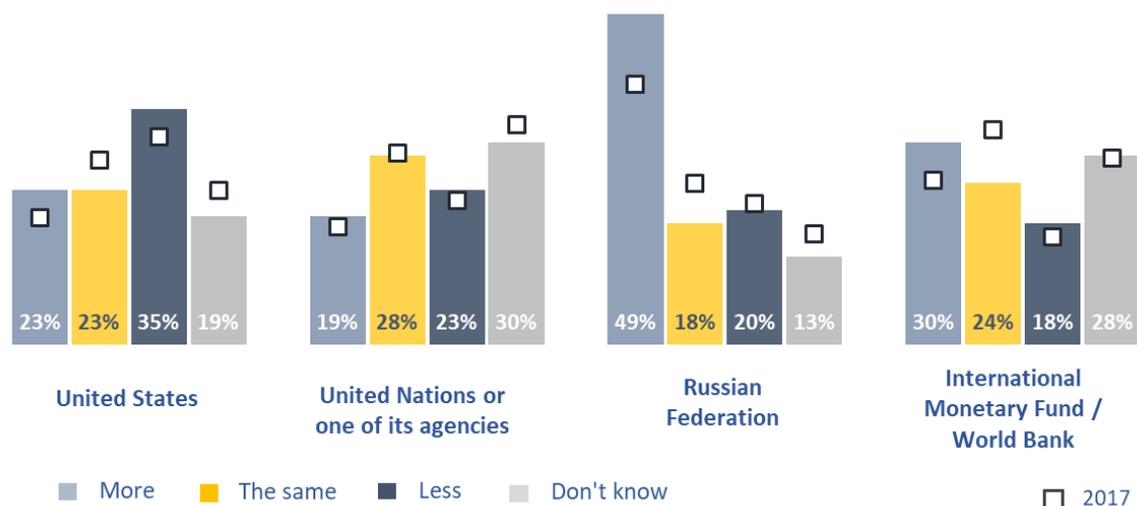
*(Percentages refer to Armenians who were aware of the EU’s financial support)*



Around half of the citizens who have heard of the European Union believe that the Russian Federation provides more financial support to their country than the EU (up 10% since 2017) and another 20% feel that the support provided by the two institutions is almost the same (down 6% since 2017). Around half also stated that the United Nations and its agencies (46%), the International Monetary Fund/World Bank (47%), and the United States of America (54%) financially support their country to the same or a greater level than the EU.

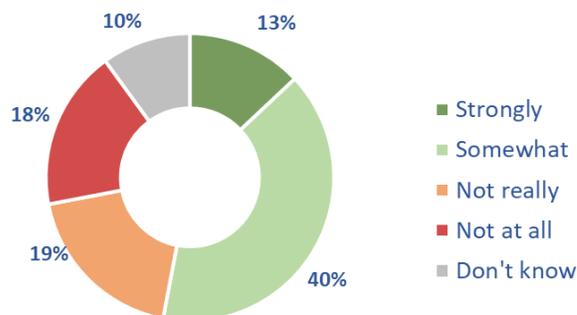
The share of citizens who did not provide a definite answer – a figure which can be used to judge the level of awareness on the issue – is lower for the Russian Federation (13%) and higher for the United Nations and International Monetary Fund/World Bank (30% and 28% respectively).

**FIGURE 12 – ‘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)*



Slightly over half of Armenians associate tangible benefits in their everyday life with the EU, versus a share of around 40% who do not see the benefits. One in ten individuals did not provide a definite answer to the question.

**FIGURE 13 – ‘The EU provides tangible benefits to citizens in their everyday lives’.**  
**To what extent do you agree with this statement about the EU?**  
*(Percentages refer to Armenians who have heard about the EU)*



The main benefits of the EU’s support which were mentioned included: greater tourism (68%), improved quality of the justice system (63%), improved infrastructure (59%), improved quality of healthcare (59%), better education (58%), greater access to more products and services (56%), greater trade (51%) and improved democracy (also 51%). Compared to 2017, the improved quality of the justice system has been seen by nearly twice as many Armenians (the figure was 33% last year), whereas access to more products and services and the effect on economic development was acknowledged by comparatively less individuals (both down 13%).

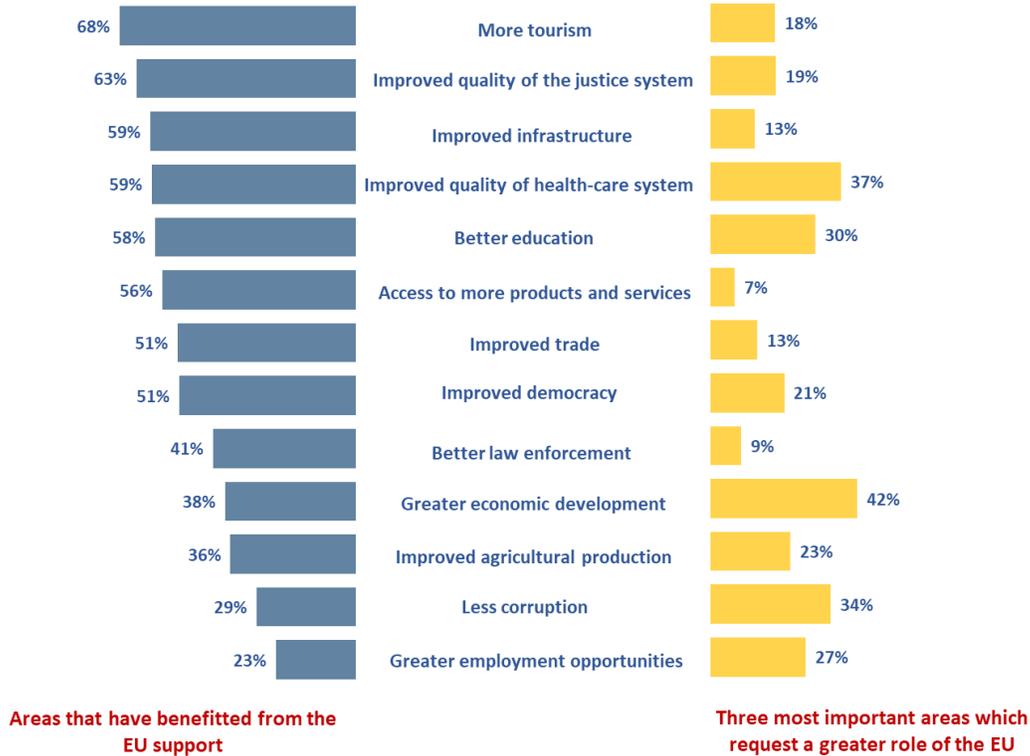
The areas where Armenian citizens feel that they have benefitted least from EU support are not necessarily those where people believe the EU should play a greater role.<sup>15</sup> In fact, alongside economic development,

<sup>15</sup> Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

corruption, employment opportunities and agricultural production – which are among the areas that have, according to citizens, benefitted the least – almost 40% of the population also believe that the EU should further support the healthcare system and 30% the education sector – both of which were areas where nearly 60% felt the country has benefited from EU support. One in four citizens think that the EU should further support tourism, the justice system and democracy.<sup>16</sup>

**FIGURE 14 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas in which Armenians request a greater role of the EU (Q2.9)**

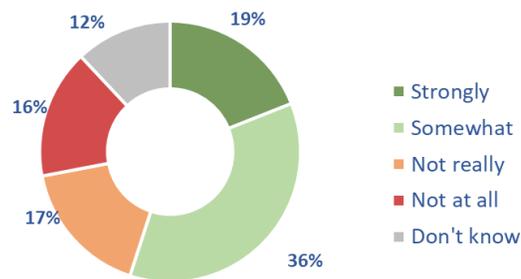
*(Percentages refer to Armenians who have heard of the EU)*



55% of Armenians believe that the EU is committed to fighting corruption. Only a third of the population ‘strongly’ (16%) or ‘somewhat’ (17%) disagree, while 12% have no definite opinion.

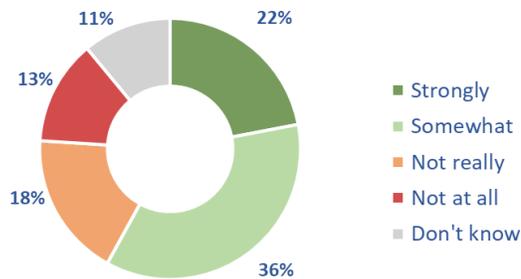
<sup>16</sup> More details are provided in Annex – Tables 8 and 9.

**FIGURE 15 – ‘The EU is committed to fighting corruption’.**  
**To what extent do you agree with this statement about the EU?**  
*(Percentages refer to Armenians who have heard of the EU)*



Nearly 60% of the population are convinced that closer integration with the EU will increase the country's security and stability (58%), which is a very important finding, considering that security is the main and most important personal value for Armenians.

**FIGURE 16 – ‘Integration with the EU increases country's security and stability’.**  
**To what extent do you agree with this statement about the EU?**  
*(Percentages refer to Armenians who have heard of the EU)*



### 3.3. Sources of information on the EU

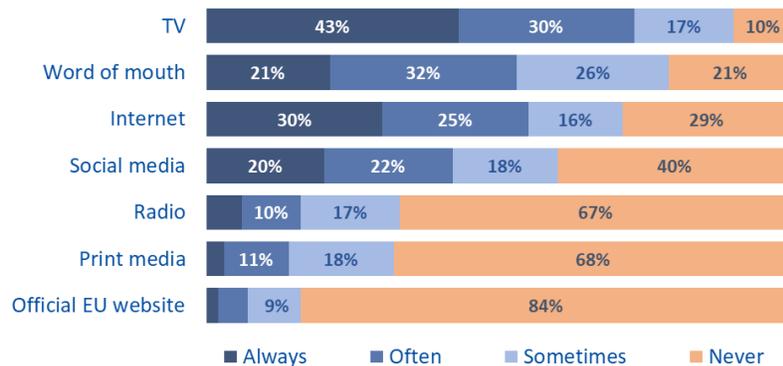
Television remains the most popular source of information in the country, followed closely by ‘word of mouth’ (80% of the population) and new media, such as the Internet (71%) and social networks (60%). Nine out of ten citizens use media in Armenian, though the high number of Russian speakers is matched by a widespread habit of relying also on Russian media. The usage of media in other foreign languages has also risen since 2017, by around 10 percentage points. Over one in three Armenians claim to have heard about the EU in the past three months and 60% assess positively the representation of the EU in national media. Compared to 2017, Armenians seem more interested in the EU’s relations with their country (21%, up 6% since last year) and with the EaP countries in general (14%, up 10% since last year).

This section looks at the main sources of information in Armenia, with a focus on specific information about the EU, its programmes and its institutional communication instruments.

#### 3.3.1. Media usage as sources of information

Television remains the most popular source of information in Armenia – 90% of the population watch it – followed closely by ‘word of mouth’, on which 79% of the population rely. The usage of the Internet (71%) and social media (used by 60% overall) is also widespread among the population, whereas Armenians rely less on other traditional media, such as radio and print press (around one in three individuals for each). The official EU website is hardly ever used – 16% access it for information.

**FIGURE 17 – Type of media used as a source of information (Q3.7)**

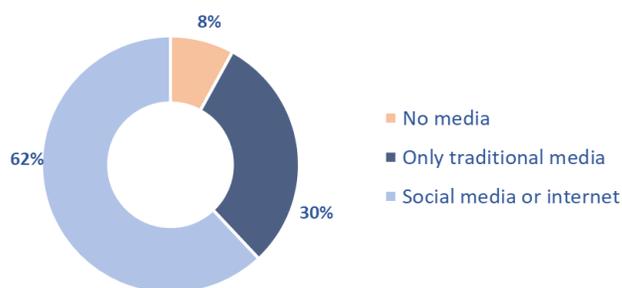


The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18.<sup>17</sup> Frequent access to social media or the Internet is the most common option (62% of the population). One in three individuals are frequent users of traditional media only (30%), whereas less than one in ten do not use any media (8%). Higher percentages of frequent users of new media can be found among young (85%) and highly educated (76%) individuals, whereas the older generation (64%) are much more likely to frequently rely on traditional media only and residents of smaller settlements not to use any media at all (10%).<sup>18</sup>

<sup>17</sup> The first includes all individuals who ‘always or often’ use only traditional media (such as television, radio and print media); the second group includes all individuals who always or often use either internet (including the official EU website) or social media; while the last group includes all individuals who do not ‘always or often’ use any of the surveyed media.

<sup>18</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.

**FIGURE 18 – Type of media frequently used as source of information**



Nearly all individuals – 49% always, 24% often and 18% sometimes – use national media in Armenian. The usage of foreign or national media in Russian is also widespread: 55% and 63% of the population respectively use them. One in three individuals also use media in other foreign languages.

**FIGURE 19 – Usage of media in Armenian, Russian and other languages (Q3.7)**

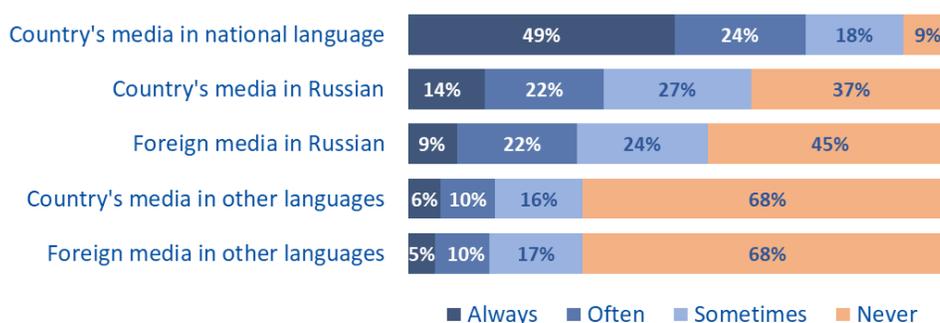


Figure 20 shows the frequency of the usage of media in Armenian, Russian and other foreign languages among the population, irrespective of whether the media sources are national or foreign.<sup>19</sup> Frequent usage of media in Armenian has remained stable this year, at around 75%, and is widespread among all socio-demographic groups.<sup>20</sup>

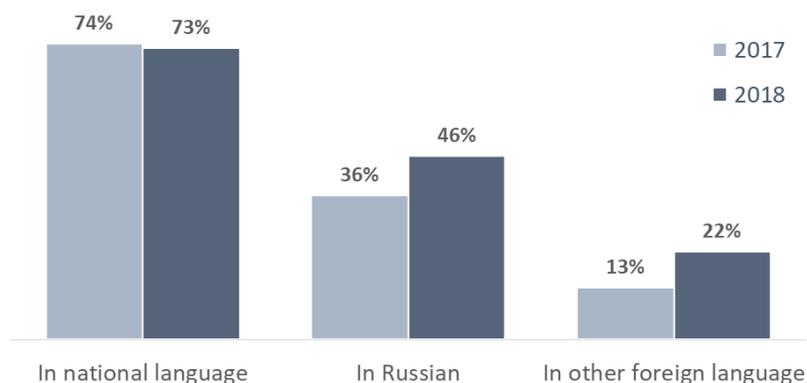
The habit of relying on media in Russian (46%) and other foreign languages (22%) is widespread and has risen since 2017 – the percentage of frequent users of both categories has increased by around 10 percentage points.<sup>21</sup> Frequent users of media both in Russian and other foreign languages tend to be residents of medium-sized settlements (57% and 37% respectively) and highly educated (56% and 38% respectively).

<sup>19</sup> Frequent users of media in Armenian are defined as all individuals who “always or often” use media in the national language; those who “always or often” use the country’s or foreign media in Russian are seen as frequent users of media in Russian. Finally, frequent users of media in foreign languages are those 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.

<sup>20</sup> More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 11.

<sup>21</sup> The high diffusion of Russian media in Armenia can be explained by the fact that a significant portion of the population is bilingual – and thus able to follow media in Russian – and also that Russian channels are freely available. The news programmes on Russian TV channels are particularly popular among the population, who often consider them to be more professional than the available local alternatives. See: Monitoring of Russian channels by MEMO 98, Final report, 2015.

**FIGURE 20 – Frequent usage of media in Armenian, Russian and other languages**



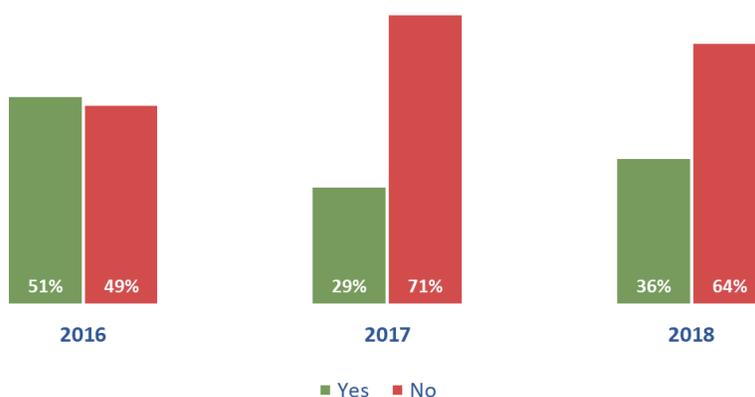
Trust levels towards different media sources are similar to the usage patterns: the majority of people trust the country’s media in Armenian (58%), followed by Russian language media (41% and 35% for local and foreign media respectively).

Television, word of mouth and the Internet are the most trusted sources of information in Armenia (55%, 47% and 42% respectively). 52% of people do not know to what extent to trust the official EU website, which is not surprising given that 84% never use it.<sup>22</sup>

### 3.3.2. Sources of information about the EU

Over one in three Armenians claim to have seen or heard information about the EU in the past three months (36%). The indicator has recorded an increase since 2017 (by 7%); nevertheless, it is not yet back at 2016 levels, when around half of the population said they had heard of the EU. Highly educated individuals have been more exposed to information about the EU recently (47%), whereas only 28% of residents of the south had seen or heard information about the EU in the three months before the survey.<sup>23</sup>

**FIGURE 21 – ‘Have you seen or heard any information about the EU in the last three months?’ (Q3.2)**  
*(Percentages refer to Armenians who have heard about the EU)*



Television is the main source of passive exposure (60%), followed by new media – such as the Internet (36%) and social media (17%). 16% of those who have heard information about the EU were reached by word of

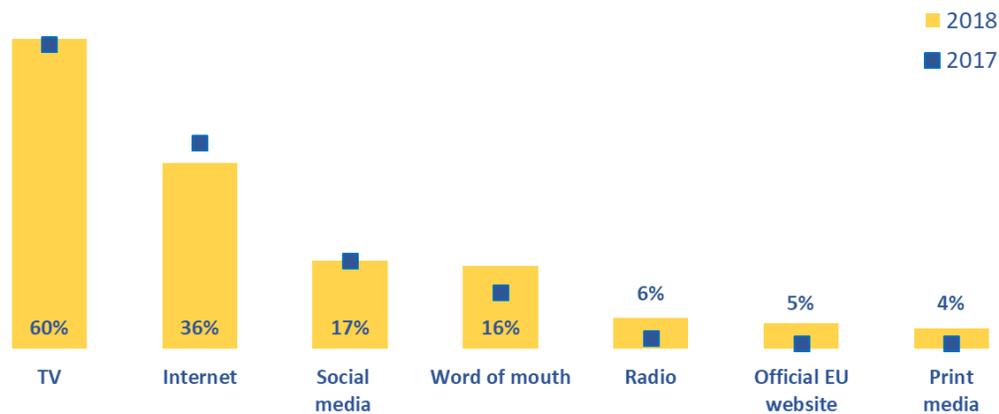
<sup>22</sup> More details are provided in Annex, Table 12.

<sup>23</sup> More details on exposure to information about the EU and socio-demographic characteristics are provided in Annex – Table 13.

mouth. Other traditional media, such as printed press (6%) and radio (4%), as well as the official EU website (5%) are less important. The figures are consistent with the 2017 findings.

**FIGURE 22 – ‘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)**

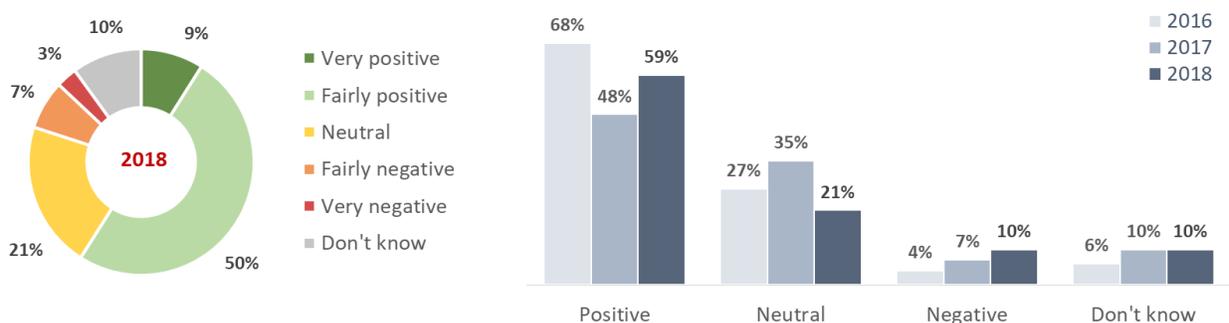
*(Percentages refer to Armenians who have heard any information about the EU in the last three months)*



Among those who had heard about the EU, nearly 60% felt that national media presented the Union positively (9% very positively, 50% fairly positively). This figure has increased compared to 2017 (by 11%), mainly at the expense of neutral views (21% versus 35% in 2017). One in ten individuals felt that the EU was represented negatively in national media. Older individuals (14%) and residents of the capital (15%) are more likely to rate the image of the EU as being negatively presented by national media than their relative socio-demographic counterparts, whereas residents of the north and the south are more undecided (18% and 16% respectively).<sup>24</sup>

**FIGURE 23 – ‘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)*



According to nearly 60% of the population, the information which they read, watch or access online helps them to have a better understanding of the EU, either ‘fairly’ (46%) or ‘very much’ (12%). However, one out of three Armenians still find it ‘not very’ (15%) or ‘not at all’ (16%) useful.

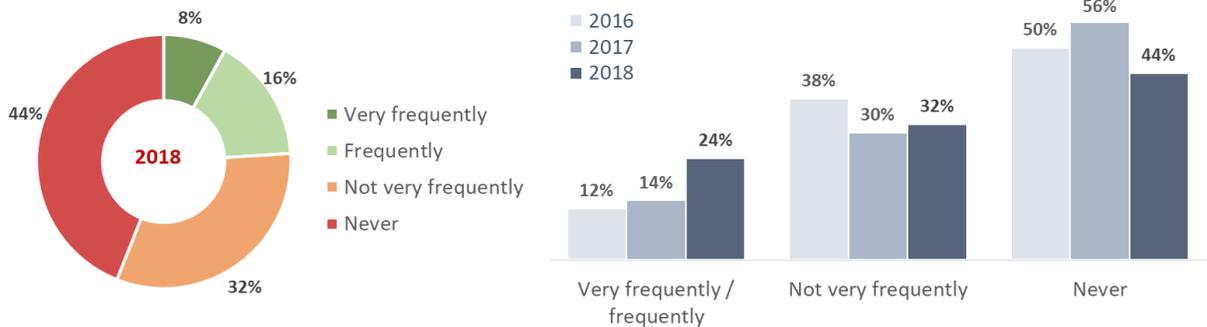
The following section looks specifically at sources of information about the EU, and therefore only refers to Armenians who actively look for/access information on the EU.

‘Frequent’ or ‘very frequent’ access to information on the EU has recorded an increase in line with the historical trend (24% versus 14% in 2017 and 12% in 2016). 44% of citizens never look for/access any

<sup>24</sup> For the distribution according to the main socio-demographic characteristics, see Table 14 in Annex.

information (it was 56% last year). Highly educated citizens (36%) and residents of middle settlements (37%) are, on average, much more likely to search for EU-related information, whereas over half of the individuals aged 55 and above (53%) and northern residents (54%) never do so.<sup>25</sup>

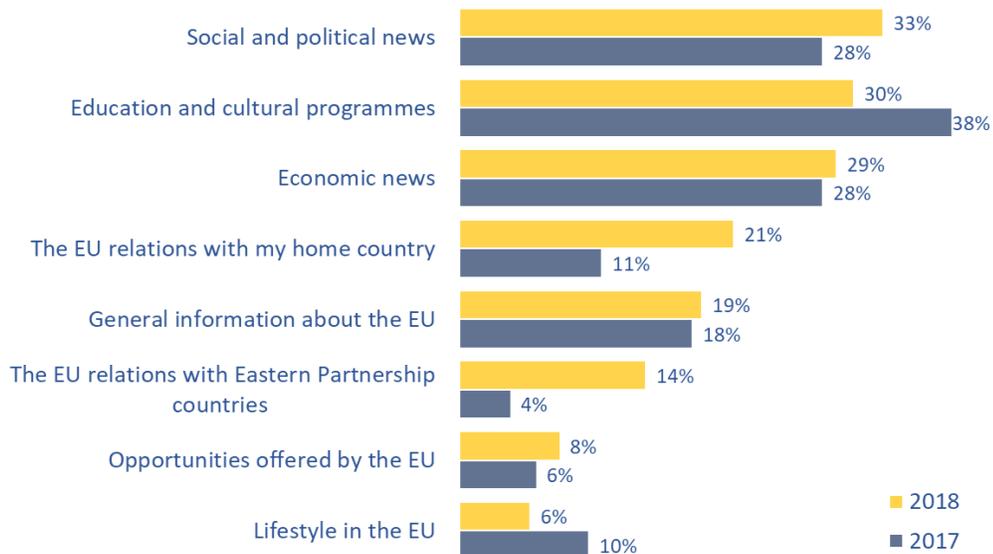
**FIGURE 24 – ‘How often do you look for/access information on the EU?’ (Q3.1)**  
*(Percentages refer to Armenians who have heard about the EU)*



Nearly three quarters of active searchers use their national language (73%), 16% use Russian and 11% English.

Compared to 2017, Armenians seem more interested in the EU’s relations with their country (21%, up 10% since last year) and the EaP countries in general (14%, up 10% since last year). Social and political news have also recorded an increase in interest and one in three Armenians looked for it in 2018 (33%). All other issues have gathered the same or a minor level of interest compared to 2017 – with education and cultural programmes recording the greatest decrease (30%, down 8% since last year).

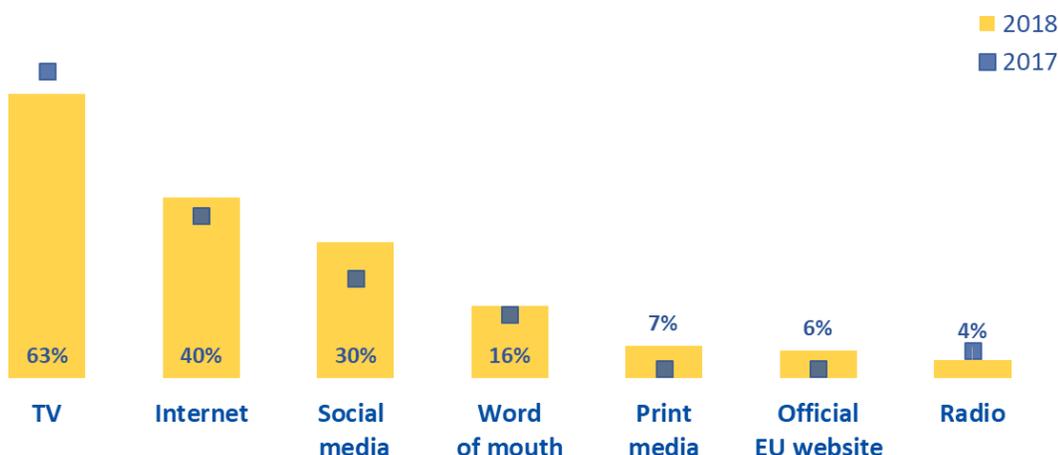
**FIGURE 25 – ‘What type of information do you normally look for?’ (Q3.1.2, multiple answers possible)**  
*(Percentages refer to Armenians who have looked for/accessed information on the EU)*



New media are definitely the main providers of information about the EU: 63% of active searches occur through the Internet and 30% through social media, which has recorded an increase of 8 percentage points since 2017. 40% of individuals still rely on television, 16% on word of mouth, 7% on the radio, 6% read print media, and 4% visit the official EU website.

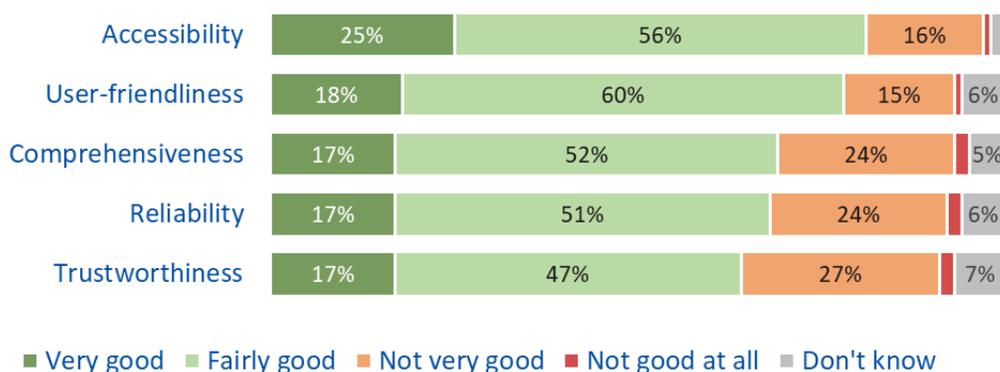
<sup>25</sup> More details on accessing information about the EU and the socio-demographic characteristics are provided in Annex – Table 15.

**FIGURE 26 – ‘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)*



The quality of EU-related information was rated quite positively by most active searchers. In particular, 81% rated it as accessible and 78% as user-friendly. Opinions were slightly less positive in terms of comprehensiveness, reliability and trustworthiness, and slightly less than 30% of citizens were not so satisfied – although their rating was only fairly negative.

**FIGURE 27 – ‘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)*



Overall, 23% of Armenians have used the EU’s informational websites<sup>26</sup> at least once in 2018 – an increase of 11 percentage points since last year. The Facebook profile of the European Union is the most accessed among all EU websites (17% of the population), followed by EU projects’ websites (10%) and Twitter (6%). The ‘EU NEIGHBOURS east’ website (4%) and Delegation website (3%) are accessed more rarely.

<sup>26</sup> This refers to EU institutions’ websites; the EU Delegation website; EU projects’ websites; the ‘EU NEIGHBOURS east’ website; and the EU Twitter and EU Facebook pages.

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

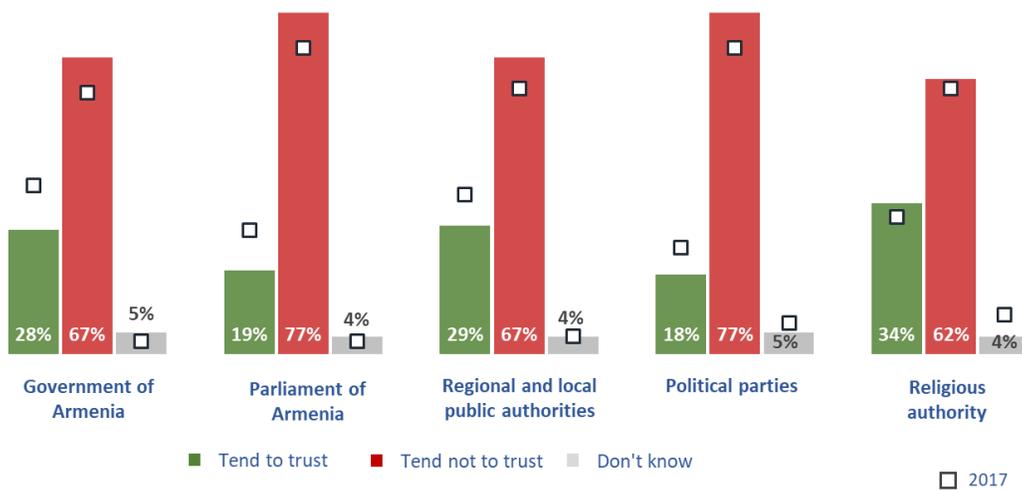
No progress has been seen in the path towards democratic governance since 2017 and the levels of trust in country’s institutions have even lowered compared to 2017. Currently, one in three individuals trust the Government or regional and local public authorities, while less than one in five trust the Parliament and political parties. Corruption, equality and social justice and free and fair elections are the most problematic issues. It therefore comes as no surprise that 64% of Armenians are not optimistic towards the future of their country and that the level of pessimism has intensified in the country since 2016.

This section presents an assessment of Armenia’s current and future situation, with regard to the current functioning of democracy and most pressing problems.

#### 3.4.1. View of Armenia’s current situation

Armenians share a very low level of trust in national, regional and local institutions, as well as political parties. Despite being the most reliable, religious authority is also trusted by only one in three citizens (34%). In addition, compared to 2017, the level of trust has overall decreased at the expense of more negative views. Currently, nearly a third of individuals trust the Government (28%) or regional and local public authorities (29%), while less than 20% trust the Parliament (19%) and the political parties (18%).

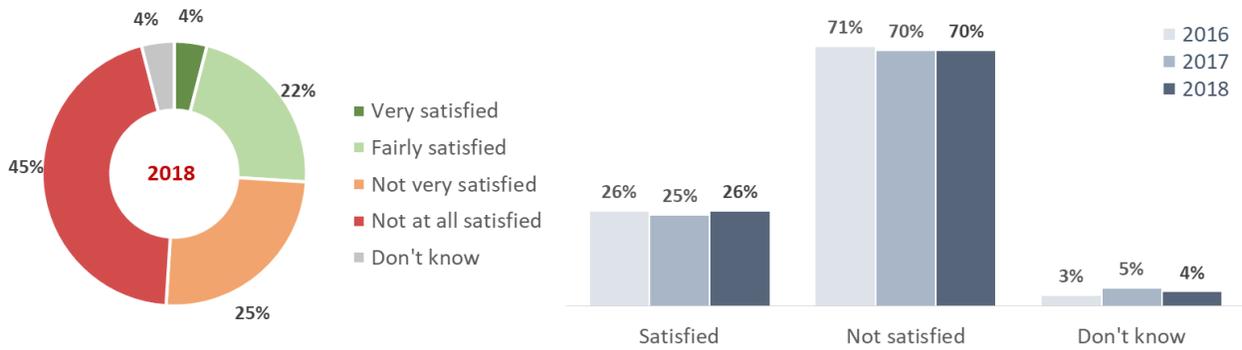
FIGURE 28 – ‘Please tell us your level of trust in the following institutions’ (Q4.1)



Accordingly, 70% of the population is dissatisfied with the way democracy works in their homeland – with 45% absolutely dissatisfied (up from 38% in 2017). Residents of the capital appear to be more dissatisfied than other sub-groups (80%), whereas residents of medium-sized cities are far more satisfied (40%).<sup>27</sup>

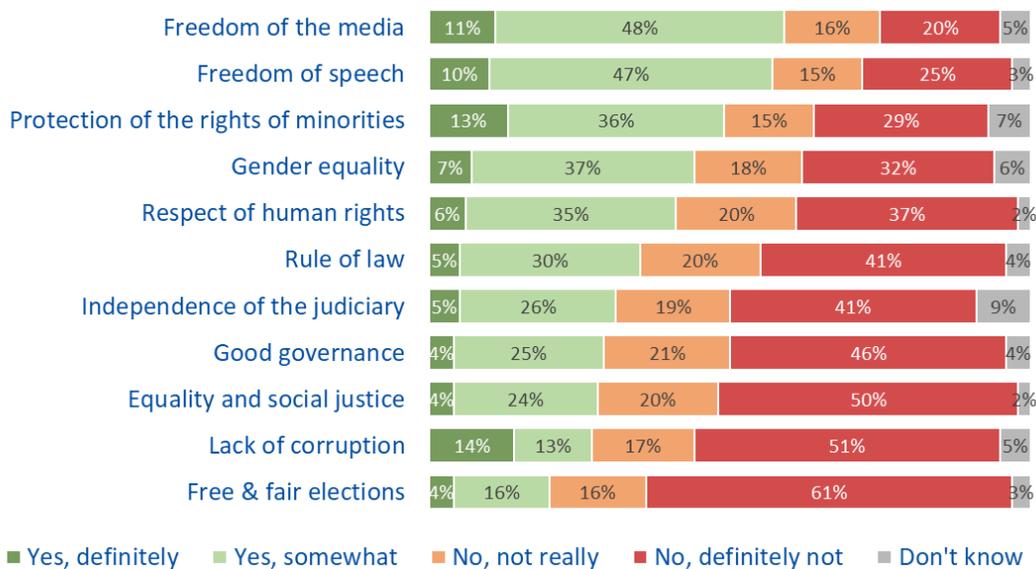
<sup>27</sup> More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

**FIGURE 29 – ‘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)**



Likewise, in 2017, only freedom of the media (59%) and freedom of speech (57%) are guaranteed in Armenia according to the majority of the population – and both indicators continue to drop by a few percentage points each year. All other democratic indicators are below the 50% threshold, with equality and social justice (28%), corruption (27%) and free and fair elections (20%) as the most problematic issues – over half of citizens stated that they definitely do not apply to Armenia.

**FIGURE 30 – ‘To what extent do you think that the following elements apply in Armenia?’ (Q4.4)**

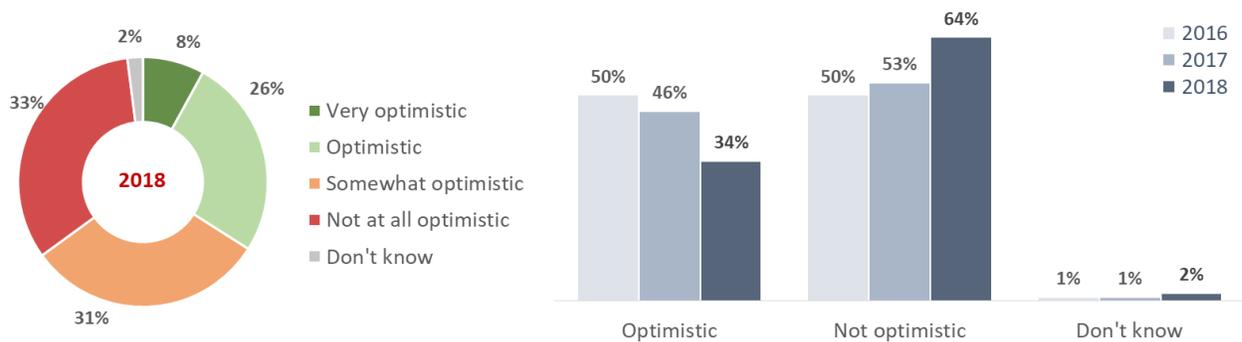


### 3.4.2. Future expectations

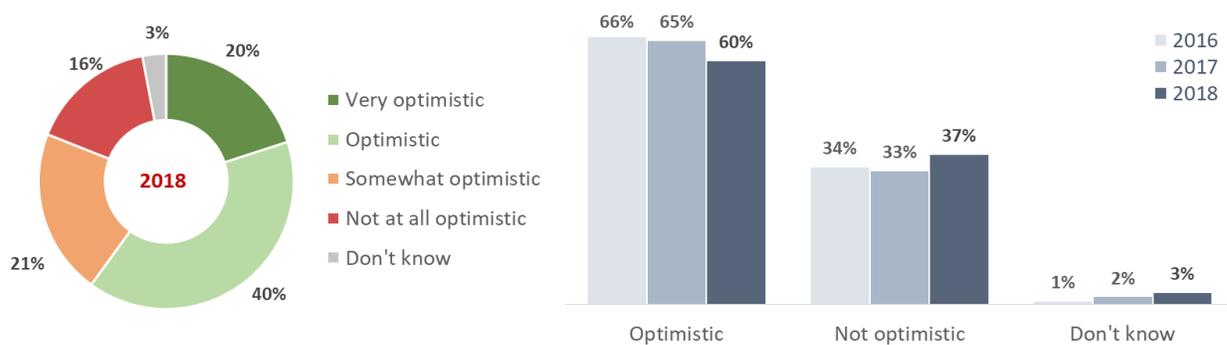
It comes as no surprise that 64% of Armenians are not optimistic about the future of their country and that the level of pessimism has intensified in the country since 2016 (up 14%). Pessimism increases with age (59% for the younger generation and up to 72% for individuals aged 55 and above) and decreases with the level of education (68% for individuals with a low to medium level of education to 47% for highly educated individuals). Southern residents are more likely to be negative (75%) than residents of the centre (64%) and, in particular, those living in the north (51%).<sup>28</sup>

Citizens' expectations on their personal future are, on average, more positive and more stable, though a slight decrease in optimism has been recorded since 2017 (60%, down 5% from last year).

**FIGURE 31 – ‘How optimistic are you about the future of your country?’ (Q4.5)**



**FIGURE 32 – ‘How optimistic are you about your personal future?’ (Q4.6)**

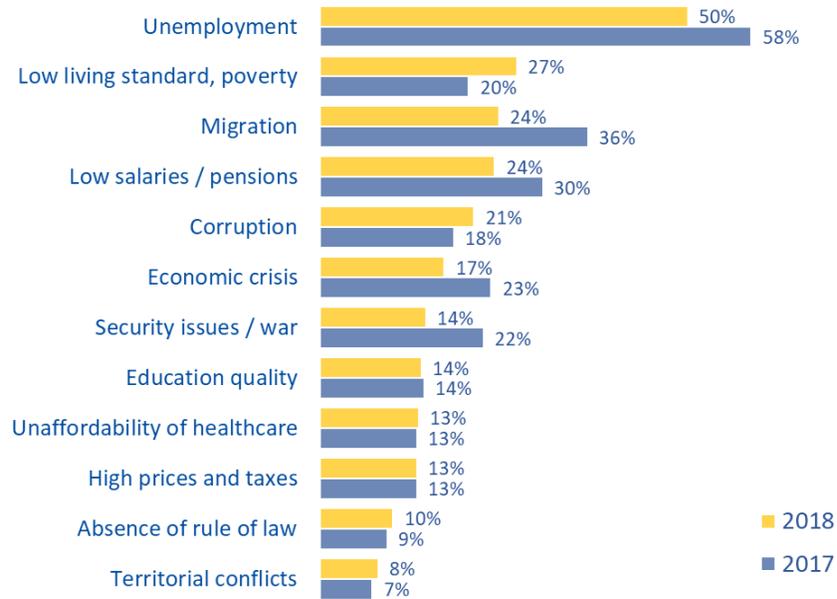


Unemployment is still the most pressing problem in Armenia, although the indicator has decreased by 8% since 2017. Security concerns, have also lowered (from 22% to 14%) and low living standards and poverty

<sup>28</sup> More details on optimism regarding citizens' personal and their country's future and socio-demographic characteristics are provided in Annex – Tables 17 and 18.

are now the second most pressing issue (27% of the population, up 7% since 2017). Less Armenians are concerned about migration (24%, down from 36%), low salaries/pensions (24%, down from 30%) and economic crisis (17%, down from 23%), whereas corruption, quality of education, healthcare costs, high prices and taxes, absence of rule of law and territorial conflicts remain mostly stable or have increased slightly since 2017.

**FIGURE 33– ‘What do you consider to be the most pressing problems facing your country?’  
(Q4.2, multiple answers possible)**



### 3.5 Profiling attitudes towards the EU: positive versus neutral

*Holders of a positive view of the EU – who represent 48% of Armenians – are equally spread among all socio-demographic groups of the population, and their profile closely matches that of the general population. Neutrally oriented citizens (36% of the population), on the other hand, have clearer characteristics: 58% are women; 81% have a low to medium level of education, 57% are unemployed/inactive and 50% live in small settlements. Compared to EU supporters, they have been less exposed to EU-related information and are nearly twice as likely not to access any information on the EU. They also tend to share lower levels of confidence in the EU and in all foreign institutions and be more pessimistic regarding their country's future. Neutral citizens also seem more interested in the opportunities that the EU can offer them, whereas one in four EU supporters are interested in the relations between Armenia and the EU.*

In this section, the attitudes of Armenians towards the EU have been analysed according to two main profiles: individuals that have a positive image of the EU and those who are mostly neutral.<sup>29</sup>

Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between Armenia and the EU, awareness and effectiveness of its financial support and level of trust towards the EU and other foreign institutions, and finally the perception of country's and respondents' personal future and main concerns.

#### 3.5.1. Positive attitudes

Those with a positive view of the EU – who represent 48% of Armenians – are equally spread among all socio-demographic groups of the population and geographical areas. In addition, their profile closely matches that of the general population of Armenia and only minor differences can be highlighted.

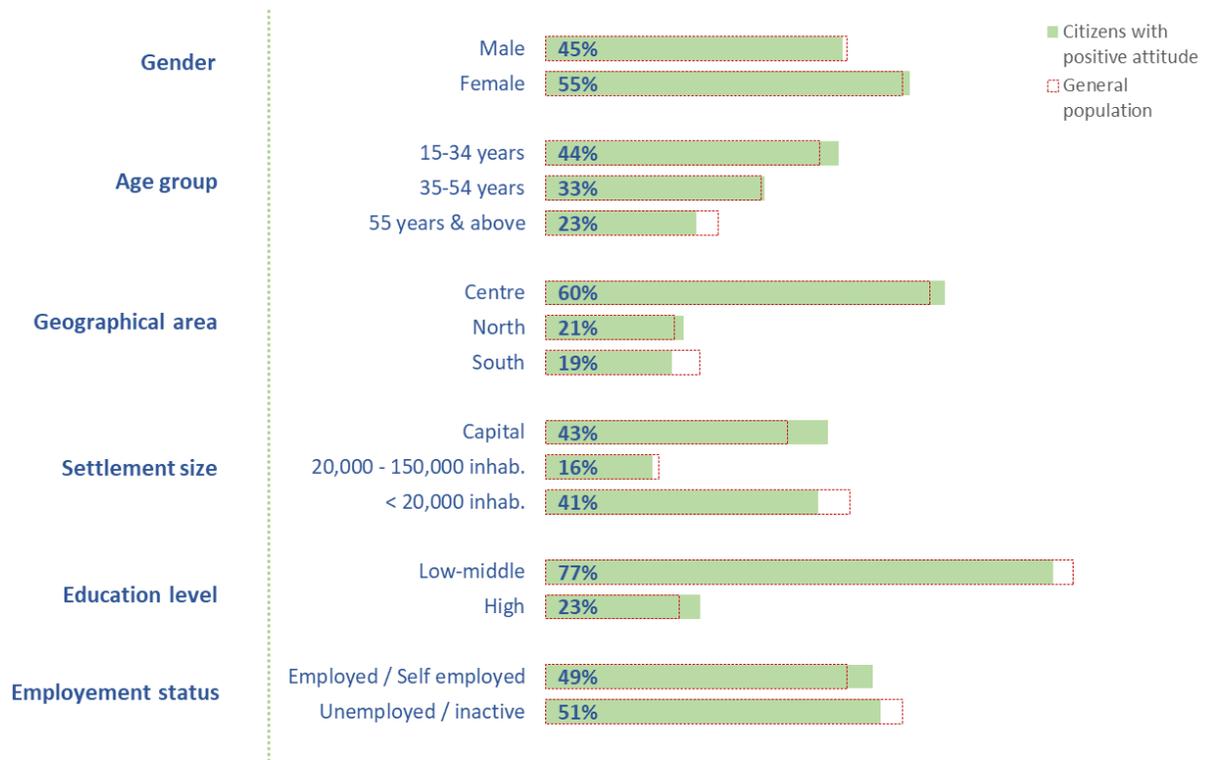
As with the general population, citizens with a positive attitude are more likely to be female (55% versus 45% who are male), but slightly more can be found among younger groups (44% are aged 15-34 versus 41% among the general population), highly educated (23% versus 20% among the general population), and employed/self-employed individuals (49% versus 46%).

No great difference was assessed in terms of residence; 43% of individuals with a positive image of the EU live in the capital (versus 37% of general citizens) and 60% in the centre (57% in the general population), where Yerevan, the capital city is located.

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<sup>29</sup> Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

**FIGURE 34 – Socio-economic characteristics and geographical location of the Armenians with a positive image of the EU**

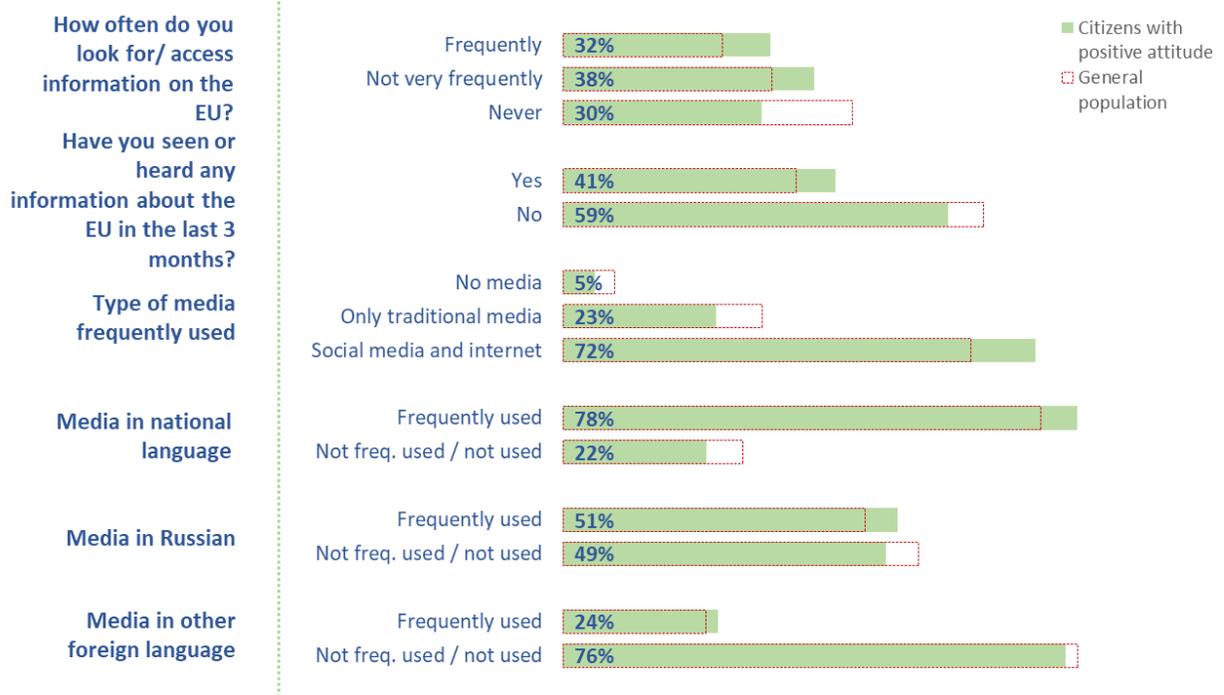


EU supporters have been slightly more passively exposed to information about the EU than the general population. 41% of them have seen or heard information about the EU in the three months preceding the survey (36% among the general population). Active exposure is also more common among EU supporters: 32% of them tend to look for/access information on the EU frequently or very frequently; 38% tend to do it not very frequently and 30% not at all (24%, 32% and 44% respectively for the general population).

78% are frequent users of national media (versus 73% among the general population). One in two EU supporters use media in Russian, and one in five use foreign media (46% and 22% respectively for the general population). 72% are keen users of new media (62% for the general population) and the Internet is more appreciated than social media (66% and 49% respectively).

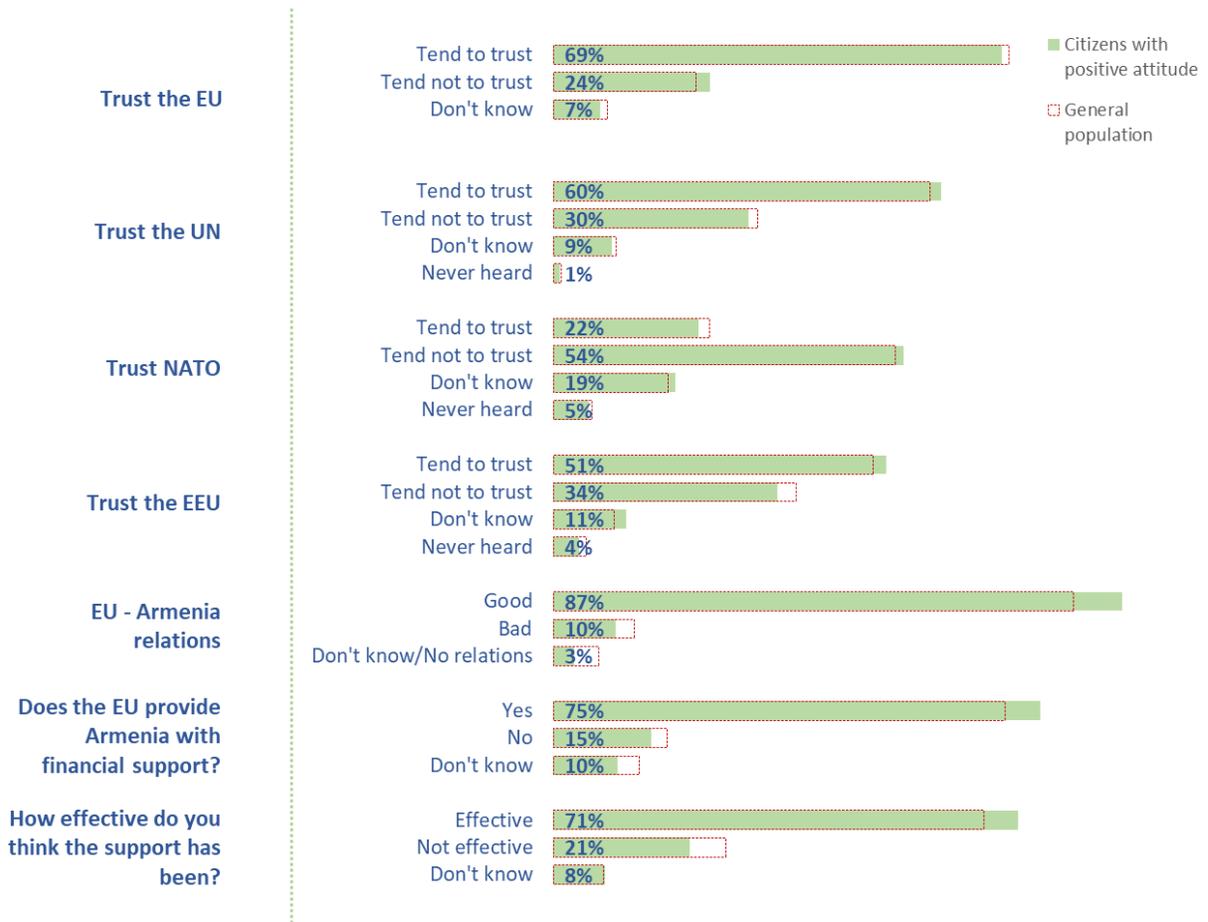
If actively searching for EU-related information, positively oriented individuals prefer to do so in their national language (70%). One in five individuals also look for/access information in Russian (19%) and one in ten in English (12%) – which is slightly more than the general population (16% and 11% respectively). No great difference with the general population was assessed in terms of the most searched topics and social and political news, economic news, education and cultural programmes and general information on the EU were the most searched issues. However, one in four EU supporters are interested in relations between Armenia and the EU (one in five among the general population). 14% are interested in the EU’s relations with the EaP countries in general.

**FIGURE 35 – Exposure to information about the EU and media usage among Armenians with a positive image of the EU**



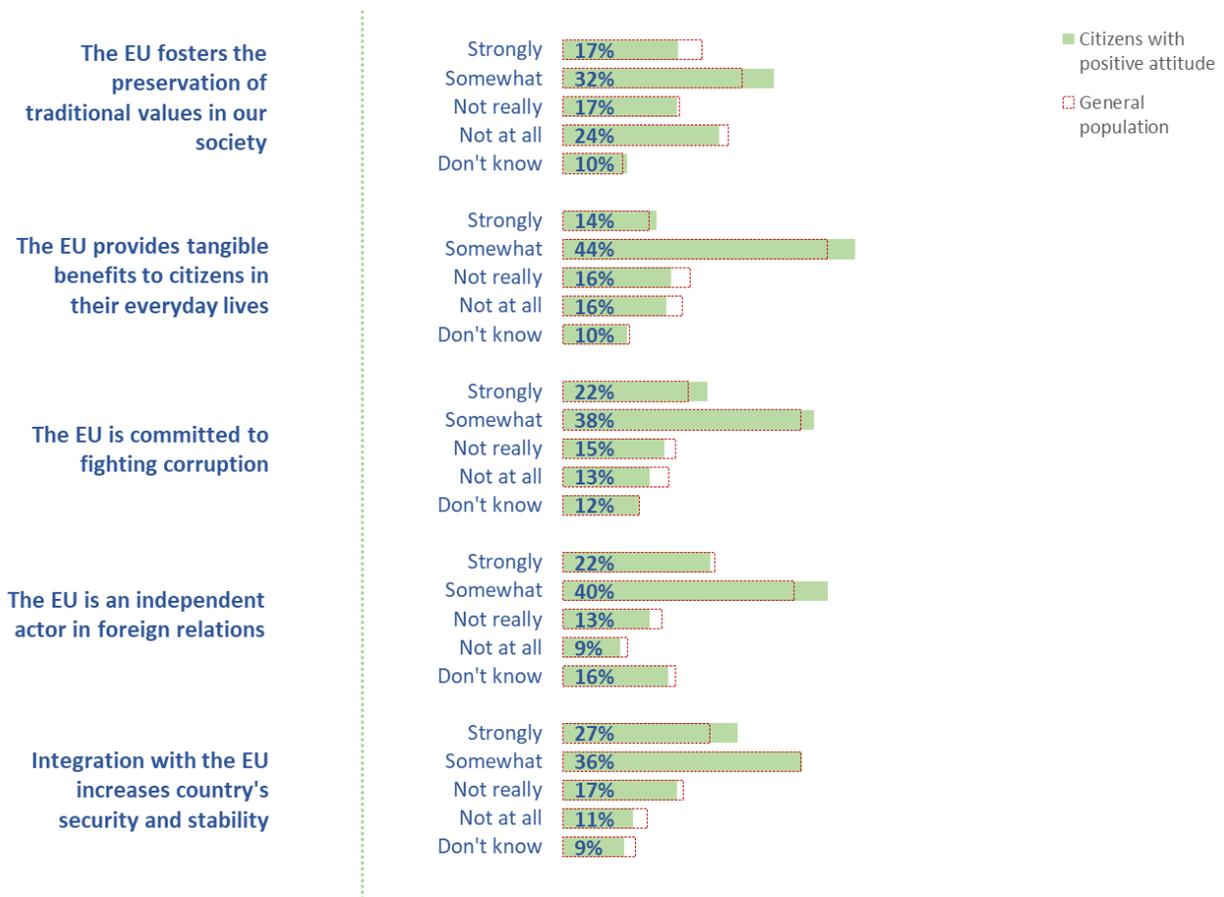
A positive image of the EU is also linked to a higher level of confidence in the EU and in all foreign institutions, including the EEU – although the difference among the general population is very small (a couple of percentage points for each institution). The rating of the relations between Armenia and the EU is definitely more positive than that of the general population (87% versus 80%), as is their acknowledgement of the EU’s financial support (75% versus 69%) and their rating of its effectiveness (71% versus 66%).

**FIGURE 36 – Attitudes towards the EU among Armenians with a positive image of the EU**



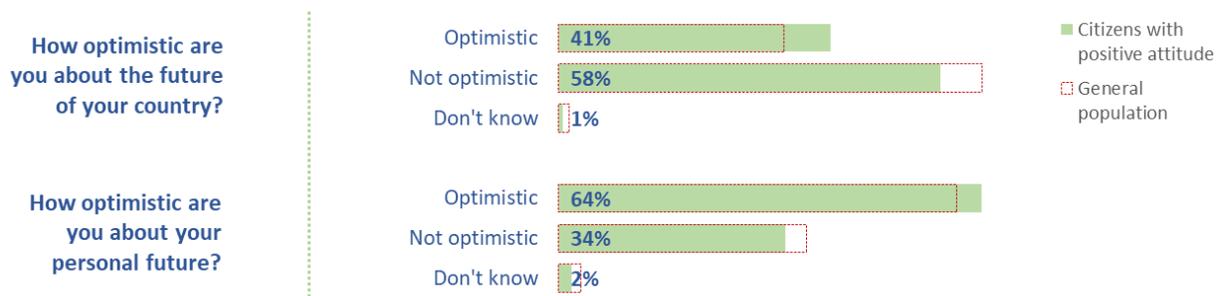
When it comes to common beliefs, EU supporters tend to share a fairly positive vision of the EU – between 32% and 44% of EU supporters somewhat agree with all the proposed statements and between 14% and 27% strongly agree. Their vision tends to converge with that of the general population when it comes to evaluating the commitment of the EU in fighting corruption, whereas they tend to agree less strongly than the overall population when it comes to the EU fostering traditional values in their society (17% versus 21%). On the contrary, EU supporters are more likely to strongly agree with the fact that integration with the EU increases the country's security and stability than the overall population (27% versus 22%). EU supporters also have a higher level of agreement with the beliefs that the EU provides tangible benefits to citizens in their everyday lives (44% of them somewhat agree versus 40% among the general population), and that the EU is an independent actor in foreign relations (40% versus 35%).

**FIGURE 37 – Common beliefs on the EU among Armenians with a positive image of the EU**



Despite having quite low levels of optimism towards the country's and their personal future (41% and 64% respectively), EU supporters tend to be more optimistic than the general population (35% and 59% respectively). Positively oriented individuals share exactly the same concerns as the general population, namely unemployment, low living standards and poverty, low salaries and pensions, migration and corruption, although they seem slightly less concerned about unemployment (46% versus 50%).

**FIGURE 38 – View of the future among Armenians with a positive image of the EU**

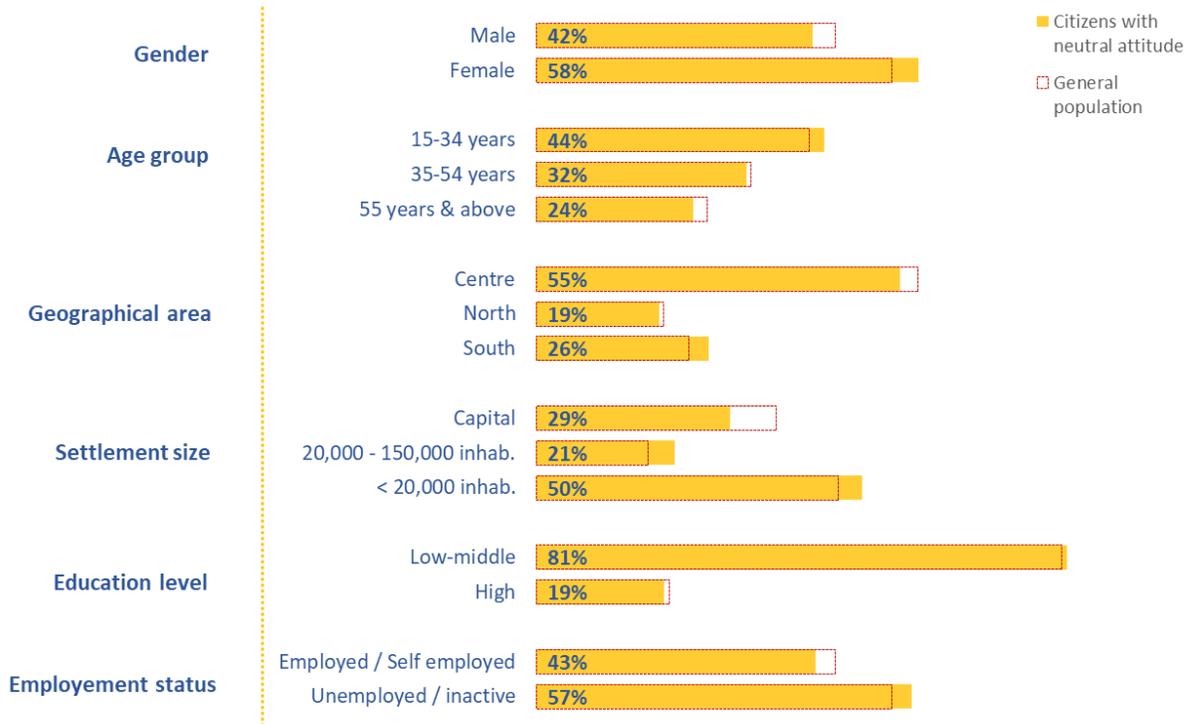


### 3.5.2. Neutral attitudes

Armenians with a neutral view of the EU account for 36% of the population. In terms of socio-demographic characteristics, they seem more concentrated in specific strata of the population than EU supporters: 58% are women, 81% have a low to medium level of education and 57% are unemployed/inactive.

As for geographical residence, they seem to be more likely to live in the south than positively oriented individuals: one in four live there, compared to one in five EU supporters. In addition, half of those with a neutral stance towards the EU live in small settlements (the figure is 41% for EU supporters).

**FIGURE 39 – Socio-economic characteristics and geographical location of Armenians with a neutral image of the EU**



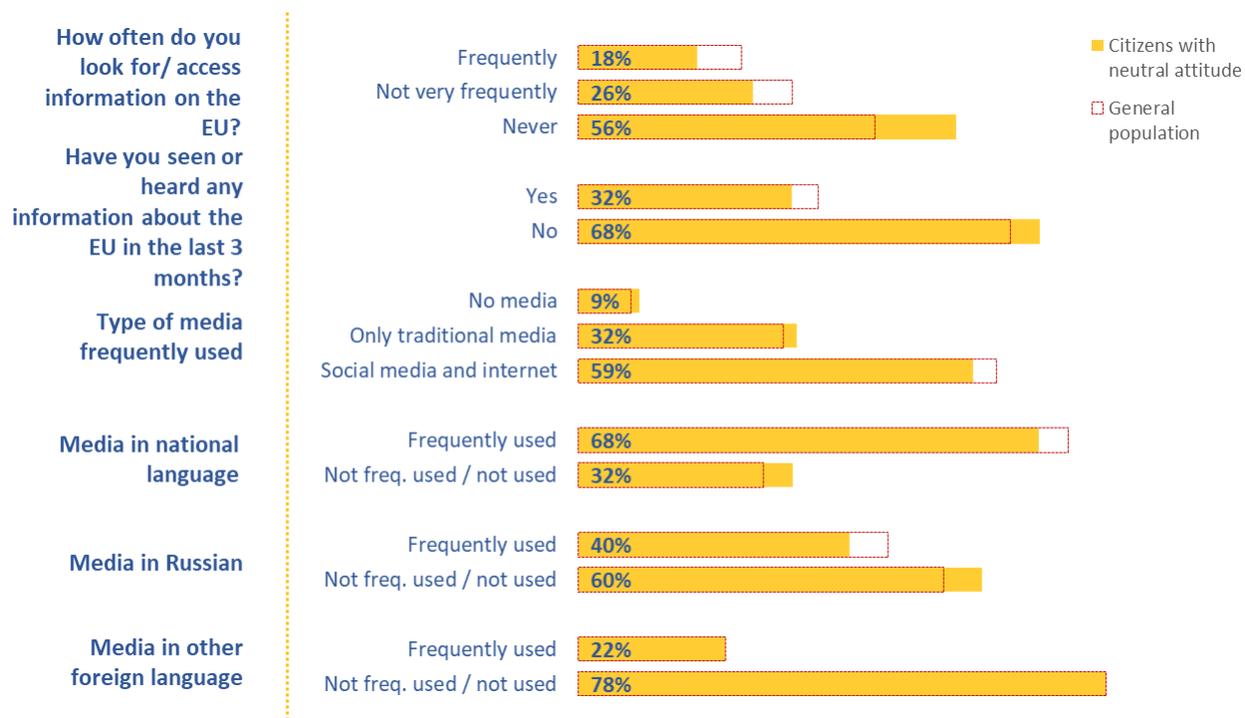
Compared to positively oriented citizens, individuals with a neutral stance have been less exposed to EU-related information – 68% had not heard about the EU in the three months preceding the survey (the figure was 59% for those holding a positive view of the Union). Accordingly, they are nearly twice as likely not to look for information on the European Union (56% versus 30% among EU supporters).

78% are frequent users of national media (versus 73% among the general population). One in two EU supporters use media in Russian, and one in five use foreign media (46% and 22% respectively for the general population). 72% are keen users of new media (62% for the general population) and the Internet is more appreciated than social media (66% and 49% respectively).

Citizens with a neutral stance are more likely to ‘never’ – or ‘not frequently’ – use national media (32%) than EU supporters (22%) and the same goes for Russian media (60% versus 49% respectively). They are also less frequent users of social media and the Internet (59% versus 72% respectively) and more likely to rely on traditional media only (32%) or no media at all (9%) – 23% and 5% respectively for EU supporters.

When searching for EU-related information, holders of a neutral view tend to do so in their national language (79% versus 70% of positively oriented individuals), and less in Russian (10% versus 19%), with no difference for those searching in English (9%). Neutral citizens seem more interested in the opportunities that the EU can offer rather than other topics, including relations between the EU and Armenia.

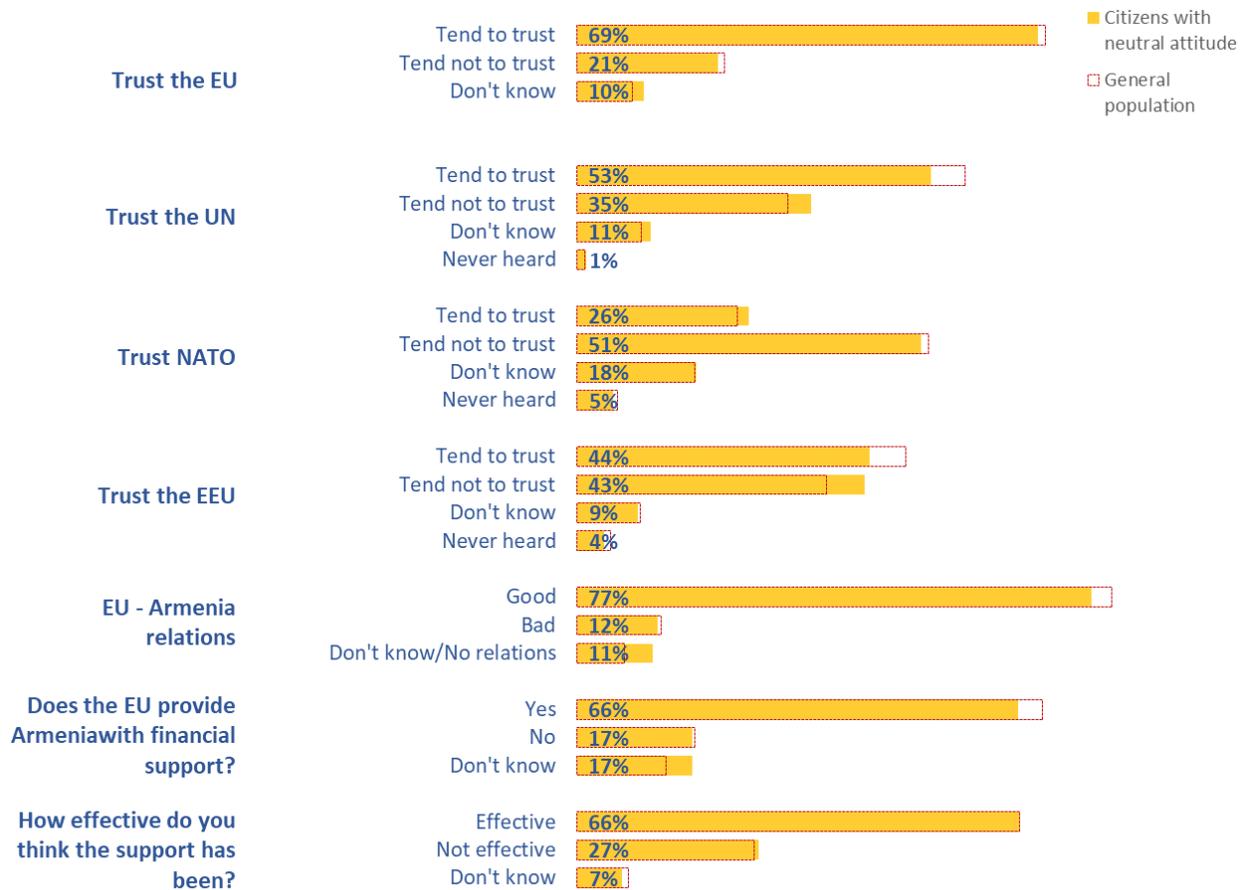
**FIGURE 40 – Exposure to information about the EU and media usage among Armenians with a neutral image of the EU**



Neutral Armenians share exactly the same level of trust in the EU as positively oriented individuals (69%). However, their trust in other institutions is lower, reaching a peak for the EEU, in which neutrally oriented individuals are equally split between trust and distrust (44% and 43% respectively).

When it comes to evaluating relations between their country and the EU, awareness and effectiveness of the EU’s financial support, neutral citizens appear to be not so familiar with the issue – between 7% and 17% did not answer the related questions – and, in general, more critical than EU supporters. The share of positive answers was between 5 and 10 percentage points lower.

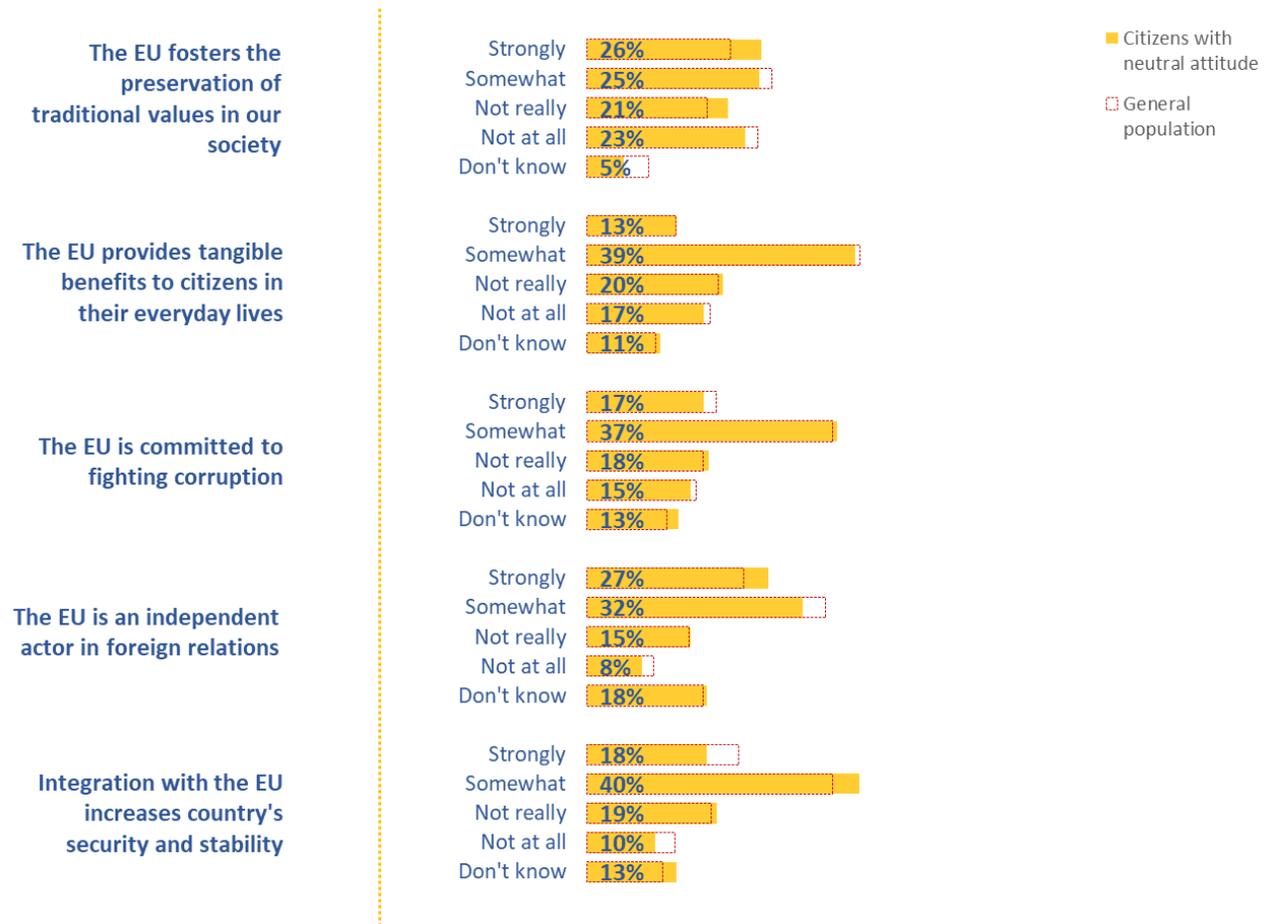
**FIGURE 41 – Attitudes towards the EU among Armenians with a neutral image of the EU**



No significant difference was recorded between the neutral and the overall population in the assessment of common beliefs. Neutrally oriented individuals also tend to share the same vision of EU supporters when it comes to the evaluation of benefits provided by the EU to citizens in everyday life. They are stronger supporters of the belief that the EU fosters the preservation of traditional values (26%) and is an independent actor in international politics (27%); and more moderate supporters of the fact that the EU is committed to fighting corruption (17%) and that closer integration would increase the country's security and stability (18%).

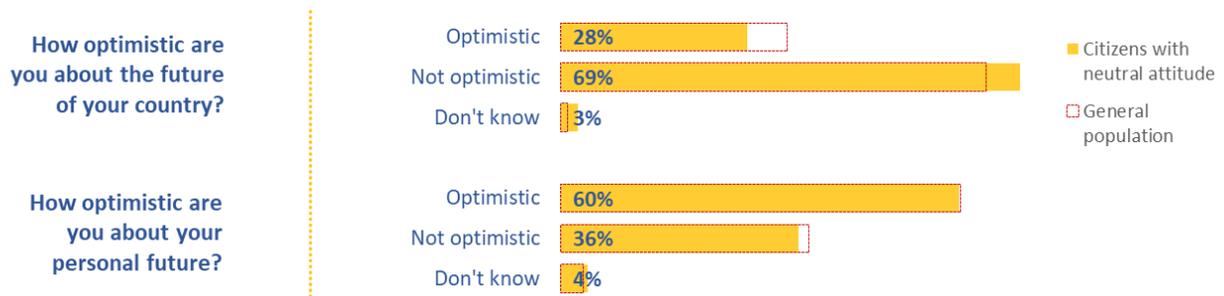
Citizens with a neutral stance are as confident as the general population – and EU supporters – in sharing their beliefs. The percentage of uncertain answers varies between 6% and 18%, with the statement “the EU is an independent actor in foreign relations”, recording the highest share of “don’t know” responses.

**FIGURE 42 – Common beliefs on the EU among Armenians with a neutral image of the EU**



Neutral individuals are very pessimistic regarding their country's future: less than 30% felt optimistic, versus 41% of EU supporters. The difference is less pronounced with regard to their personal future (60% optimistic versus 64% for EU supporters). They are also slightly more concerned about unemployment (51%), low living standards and poverty (51%) than citizens holding a positive stance towards the EU.

**FIGURE 43 – View of the future among Armenians with a neutral image of the EU**



# 5. Annex

**TABLE 1 – Perceptions 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 of the EU	Total
<b>Settlement size</b>	Capital	56%	29%	11%	4%	100%
	Between 20,000 and 150,000 inhabitants	43%	43%	5%	9%	100%
	Less than 20,000 inhabitants	42%	39%	8%	11%	100%
<b>Gender</b>	Male	47%	33%	11%	9%	100%
	Female	48%	38%	6%	8%	100%
<b>Age group</b>	15-34 years	51%	38%	3%	8%	100%
	35-54 years	48%	36%	11%	5%	100%
	55 years & above	41%	33%	14%	12%	100%
<b>Education level</b>	Low/medium level	46%	36%	8%	10%	100%
	High level	55%	34%	9%	2%	100%
<b>Employment status</b>	Employed / Self-employed	52%	33%	9%	6%	100%
	Unemployed or temporarily not working / inactive	44%	38%	8%	10%	100%
<b>Geographical area</b>	Centre	50%	35%	10%	5%	100%
	North	51%	34%	6%	9%	100%
	South	39%	40%	6%	15%	100%
<b>Total</b>		<b>48%</b>	<b>36%</b>	<b>8%</b>	<b>8%</b>	<b>100%</b>

**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
<b>Individual freedom</b>	45%	42%	6%	3%	4%	100%
<b>Freedom of speech</b>	43%	43%	7%	3%	4%	100%
<b>Economic prosperity</b>	40%	46%	5%	4%	5%	100%
<b>Human rights</b>	43%	43%	7%	5%	2%	100%
<b>Respect for other cultures, minorities</b>	42%	43%	6%	4%	5%	100%
<b>Rule of law</b>	36%	46%	9%	5%	4%	100%
<b>Freedom of religion</b>	45%	36%	7%	5%	7%	100%
<b>Freedom of the media</b>	37%	42%	8%	6%	7%	100%
<b>Peace, security and stability</b>	30%	47%	14%	6%	3%	100%
<b>Democracy</b>	32%	44%	9%	5%	10%	100%
<b>Equality and social justice</b>	29%	45%	13%	10%	3%	100%
<b>Honesty &amp; transparency</b>	25%	47%	13%	10%	5%	100%
<b>Absence of corruption</b>	18%	37%	19%	17%	9%	100%

Percentages refer to Armenians who have heard of 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. Please tell me if you tend to trust it or tend not to trust it.					
		Tend to trust	Tend not to trust	Don't know	Total
Settlement size	Capital	67%	26%	7%	100%
	Between 20,000 and 150,000 inhabitants	71%	20%	9%	100%
	Less than 20,000 inhabitants	72%	19%	9%	100%
Gender	Male	74%	18%	8%	100%
	Female	66%	25%	9%	100%
Age group	15-34 years	74%	18%	8%	100%
	35-54 years	67%	24%	9%	100%
	55 years & above	67%	25%	8%	100%
Education level	Low/medium level	70%	22%	8%	100%
	High level	69%	21%	10%	100%
Employment status	Employed / Self-employed	71%	21%	8%	100%
	Unemployed or temporarily not working / inactive	68%	23%	9%	100%
Geographical area	Centre	70%	22%	8%	100%
	North	72%	22%	6%	100%
	South	69%	21%	10%	100%
<b>Total</b>		<b>70%</b>	<b>22%</b>	<b>8%</b>	<b>100%</b>

Percentages refer to Armenians who have heard of the EU

**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	77%	14%	9%	100%
	Between 20,000 and 150,000 inhabitants	84%	10%	6%	100%
	Less than 20,000 inhabitants	81%	12%	7%	100%
Gender	Male	76%	15%	9%	100%
	Female	83%	10%	7%	100%
Age group	15-34 years	83%	11%	6%	100%
	35-54 years	84%	10%	6%	100%
	55 years & above	67%	19%	14%	100%
Education level	Low/medium level	80%	12%	8%	100%
	High level	80%	14%	6%	100%
Employment status	Employed / Self-employed	80%	13%	7%	100%
	Unemployed or temporarily not working / inactive	79%	12%	9%	100%
Geographical area	Centre	77%	14%	9%	100%
	North	82%	13%	5%	100%
	South	84%	9%	7%	100%
<b>Total</b>		<b>80%</b>	<b>13%</b>	<b>7%</b>	<b>100%</b>

Percentages refer to Armenians who have heard of the EU

**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
<b>Settlement size</b>	Capital	68%	20%	12%	100%
	Between 20,000 and 150,000 inhabitants	66%	20%	14%	100%
	Less than 20,000 inhabitants	71%	15%	14%	100%
<b>Gender</b>	Male	64%	23%	13%	100%
	Female	74%	13%	13%	100%
<b>Age group</b>	15-34 years	67%	19%	14%	100%
	35-54 years	74%	14%	12%	100%
	55 years & above	67%	20%	13%	100%
<b>Education level</b>	Low/medium level	68%	18%	14%	100%
	High level	74%	15%	11%	100%
<b>Employment status</b>	Employed / Self-employed	71%	14%	15%	100%
	Unemployed or temporarily not working / inactive	68%	20%	12%	100%
<b>Geographical area</b>	Centre	71%	17%	12%	100%
	North	62%	27%	11%	100%
	South	71%	9%	20%	100%
<b>Total</b>		<b>69%</b>	<b>18%</b>	<b>13%</b>	<b>100%</b>

Percentages refer to Armenians who have heard of the EU

**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
<b>Settlement size</b>	Capital	54%	40%	6%	100%
	Between 20,000 and 150,000 inhabitants	78%	13%	9%	100%
	Less than 20,000 inhabitants	71%	20%	9%	100%
<b>Gender</b>	Male	60%	35%	5%	100%
	Female	69%	21%	10%	100%
<b>Age group</b>	15-34 years	73%	21%	6%	100%
	35-54 years	64%	29%	7%	100%
	55 years & above	58%	31%	11%	100%
<b>Education level</b>	Low/medium level	68%	25%	7%	100%
	High level	60%	31%	9%	100%
<b>Employment status</b>	Employed / Self-employed	61%	31%	8%	100%
	Unemployed or temporarily not working / inactive	70%	23%	7%	100%
<b>Geographical area</b>	Centre	62%	33%	5%	100%
	North	79%	14%	7%	100%
	South	69%	17%	14%	100%
<b>Total</b>		<b>66%</b>	<b>26%</b>	<b>8%</b>	<b>100%</b>

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

**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
<b>Settlement size</b>	Capital	40%	60%	100%
	Between 20,000 and 150,000 inhabitants	56%	44%	100%
	Less than 20,000 inhabitants	40%	60%	100%
<b>Gender</b>	Male	47%	53%	100%
	Female	39%	61%	100%
<b>Age group</b>	15-34 years	42%	58%	100%
	35-54 years	42%	58%	100%
	55 years & above	44%	56%	100%
<b>Education level</b>	Low/medium level	39%	61%	100%
	High level	56%	44%	100%
<b>Employment status</b>	Employed / Self-employed	40%	60%	100%
	Unemployed or temporarily not working / inactive	45%	55%	100%
<b>Geographical area</b>	Centre	43%	57%	100%
	North	45%	55%	100%
	South	41%	59%	100%
<b>Total</b>		<b>43%</b>	<b>57%</b>	<b>100%</b>

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

**TABLE 8 – 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
More tourism	20%	48%	17%	7%	8%	100%
Improved quality of the justice system	16%	47%	16%	10%	11%	100%
Improved infrastructure	11%	48%	23%	11%	7%	100%
Improved quality of healthcare system	12%	47%	21%	12%	8%	100%
Better education	9%	49%	21%	13%	8%	100%
Access to more products and services	11%	45%	23%	15%	6%	100%
Improved trade	10%	41%	26%	14%	9%	100%
Improved democracy	7%	44%	25%	14%	10%	100%
Better law enforcement	6%	35%	29%	22%	8%	100%
Greater economic development	5%	33%	31%	19%	12%	100%
Improved agricultural production	8%	28%	32%	23%	9%	100%
Less corruption	7%	22%	29%	27%	15%	100%
Greater employment opportunities	5%	18%	28%	39%	10%	100%

Percentages refer to Armenians who have heard of the EU

**TABLE 9 – 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 quality of healthcare system	15%	37%
Reduce corruption	15%	34%
Promote economic development	13%	42%
Promote better education	10%	30%
Create greater employment opportunities	9%	27%
Improve quality of the justice system	8%	19%
Improve agricultural production	7%	23%
Improve democracy	6%	21%
Increase tourism	6%	18%
Improve trade	3%	13%
Improve infrastructure	3%	13%
Promote better law enforcement	3%	9%
Promote access to more products and services	2%	7%

Percentages refer to Armenians who have heard of the EU

**TABLE 10 – 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	6%	34%	60%	100%	<b>58%</b>
	Between 20,000 and 150,000 inhabitants	5%	22%	73%	100%	<b>48%</b>
	Less than 20,000 inhabitants	10%	31%	59%	100%	<b>51%</b>
Gender	Male	9%	30%	61%	100%	<b>55%</b>
	Female	7%	30%	63%	100%	<b>51%</b>
Age group	15-34 years	9%	6%	85%	100%	<b>57%</b>
	35-54 years	5%	34%	61%	100%	<b>52%</b>
	55 years & above	9%	64%	27%	100%	<b>48%</b>
Education level	Low/medium level	9%	33%	58%	100%	<b>53%</b>
	High level	5%	19%	76%	100%	<b>54%</b>
Employment status	Employed/ Self-employed	8%	25%	67%	100%	<b>55%</b>
	Unemployed or temporarily not working / inactive	7%	35%	58%	100%	<b>52%</b>
Geographical area	Centre	7%	32%	61%	100%	<b>57%</b>
	North	11%	25%	64%	100%	<b>46%</b>
	South	8%	30%	62%	100%	<b>49%</b>
Total		<b>8%</b>	<b>30%</b>	<b>62%</b>	<b>100%</b>	<b>53%</b>

**TABLE 11 – 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
<b>Settlement size</b>	Capital	76%	49%	22%
	Between 20,000 and 150,000 inhabitants	71%	57%	37%
	Less than 20,000 inhabitants	71%	39%	16%
<b>Gender</b>	Male	72%	50%	24%
	Female	73%	43%	20%
<b>Age group</b>	15-34 years	65%	42%	25%
	35-54 years	79%	48%	19%
	55 years & above	76%	49%	20%
<b>Education level</b>	Low/medium level	72%	43%	18%
	High level	74%	56%	38%
<b>Employment status</b>	Employed / Self-employed	70%	44%	17%
	Unemployed or temporarily not working / inactive	75%	48%	26%
<b>Geographical area</b>	Centre	77%	49%	24%
	North	67%	49%	22%
	South	65%	37%	16%
<b>Total</b>		<b>73%</b>	<b>46%</b>	<b>22%</b>

**TABLE 12 – Trust towards different types of media**

Q3.9. & Q3.10. What 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	19%	29%	52%	100%
Television	55%	39%	6%	100%
Radio	30%	37%	33%	100%
Print media	29%	41%	30%	100%
Social media	35%	44%	21%	100%
Internet	42%	41%	17%	100%
Word of mouth	47%	44%	9%	100%
Country's media in Armenian	58%	36%	6%	100%
Country's media in Russian	41%	44%	15%	100%
Country's media in other languages	22%	50%	28%	100%
Foreign media in Russian	35%	42%	23%	100%
Foreign media in other languages	20%	49%	31%	100%

**TABLE 13 – 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	38%	62%	100%
	Between 20,000 and 150,000 inhabitants	37%	63%	100%
	Less than 20,000 inhabitants	33%	67%	100%
Gender	Male	38%	62%	100%
	Female	33%	67%	100%
Age group	15-34 years	38%	62%	100%
	35-54 years	32%	68%	100%
	55 years & above	36%	64%	100%
Education level	Low/medium level	32%	68%	100%
	High level	47%	53%	100%
Employment status	Employed / Self-employed	38%	62%	100%
	Unemployed or temporarily not working / inactive	33%	67%	100%
Geographical area	Centre	40%	60%	100%
	North	31%	69%	100%
	South	28%	72%	100%
<b>Total</b>		<b>36%</b>	<b>64%</b>	<b>100%</b>

Percentages refer to Armenians who have heard of the EU

**TABLE 14 – 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	55%	23%	15%	7%	100%
	Between 20,000 and 150,000 inhabitants	68%	19%	3%	10%	100%
	Less than 20,000 inhabitants	58%	20%	8%	14%	100%
Gender	Male	57%	22%	11%	10%	100%
	Female	60%	20%	9%	11%	100%
Age group	15-34 years	59%	25%	7%	9%	100%
	35-54 years	63%	16%	10%	11%	100%
	55 years & above	54%	20%	14%	12%	100%
Education level	Low/medium level	59%	19%	10%	12%	100%
	High level	57%	29%	9%	5%	100%
Employment status	Employed / Self-employed	62%	20%	10%	8%	100%
	Unemployed or temporarily not working / inactive	56%	22%	10%	12%	100%
Geographical area	Centre	59%	22%	13%	6%	100%
	North	60%	16%	6%	18%	100%
	South	56%	23%	5%	16%	100%
<b>Total</b>		<b>59%</b>	<b>21%</b>	<b>10%</b>	<b>10%</b>	<b>100%</b>

Percentages refer to Armenians who have heard about the EU

**TABLE 15 – 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	23%	32%	45%	100%
	Between 20,000 and 150,000 inhabitants	37%	31%	32%	100%
	Less than 20,000 inhabitants	20%	32%	48%	100%
Gender	Male	27%	29%	44%	100%
	Female	22%	34%	44%	100%
Age group	15-34 years	23%	41%	36%	100%
	35-54 years	25%	28%	47%	100%
	55 years & above	24%	23%	53%	100%
Education level	Low/medium level	21%	32%	47%	100%
	High level	36%	33%	31%	100%
Employment status	Employed / Self-employed	21%	35%	44%	100%
	Unemployed or temporarily not working / inactive	27%	29%	44%	100%
Geographical area	Centre	27%	31%	42%	100%
	North	15%	31%	54%	100%
	South	25%	33%	42%	100%
<b>Total</b>		<b>24%</b>	<b>32%</b>	<b>44%</b>	<b>100%</b>

Percentages refer to Armenians who have heard of the EU

**TABLE 16 – Satisfaction with democracy in Armenia**

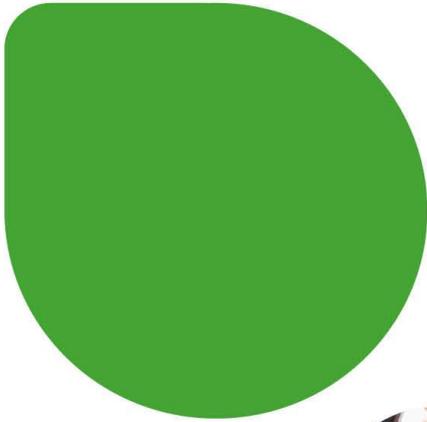
Q4.3 - On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Armenia?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Capital	18%	80%	2%	100%
	Between 20,000 and 150,000 inhabitants	40%	56%	4%	100%
	Less than 20,000 inhabitants	25%	69%	6%	100%
Gender	Male	23%	73%	4%	100%
	Female	27%	69%	4%	100%
Age group	15-34 years	31%	65%	4%	100%
	35-54 years	23%	75%	2%	100%
	55 years & above	19%	74%	7%	100%
Education level	Low/medium level	24%	71%	5%	100%
	High level	32%	66%	2%	100%
Employment status	Employed / Self-employed	22%	75%	3%	100%
	Unemployed or temporarily not working / inactive	28%	67%	5%	100%
Geographical area	Centre	27%	71%	2%	100%
	North	28%	68%	4%	100%
	South	20%	71%	9%	100%
<b>Total</b>		<b>26%</b>	<b>70%</b>	<b>4%</b>	<b>100%</b>

**TABLE 17 – Optimism regarding Armenia’s future**

<b>Q4.5. How optimistic are you about the future of your country?</b>					
		<b>Optimistic</b>	<b>Pessimistic</b>	<b>Don't know</b>	<b>Total</b>
<b>Settlement size</b>	Capital	34%	65%	1%	<b>100%</b>
	Between 20,000 and 150,000 inhabitants	46%	51%	3%	<b>100%</b>
	Less than 20,000 inhabitants	31%	67%	2%	<b>100%</b>
<b>Gender</b>	Male	33%	66%	1%	<b>100%</b>
	Female	36%	62%	2%	<b>100%</b>
<b>Age group</b>	15-34 years	40%	58%	2%	<b>100%</b>
	35-54 years	35%	64%	1%	<b>100%</b>
	55 years & above	25%	72%	3%	<b>100%</b>
<b>Education level</b>	Low/medium level	30%	68%	2%	<b>100%</b>
	High level	52%	47%	1%	<b>100%</b>
<b>Employment status</b>	Employed / Self-employed	35%	63%	2%	<b>100%</b>
	Unemployed or temporarily not working / inactive	35%	64%	1%	<b>100%</b>
<b>Geographical area</b>	Centre	35%	63%	2%	<b>100%</b>
	North	48%	51%	1%	<b>100%</b>
	South	23%	75%	2%	<b>100%</b>
<b>Total</b>		<b>34%</b>	<b>64%</b>	<b>2%</b>	<b>100%</b>

**TABLE 18 – Optimism regarding personal future**

<b>Q4.6. How optimistic are you about your personal future?</b>					
		<b>Optimistic</b>	<b>Pessimistic</b>	<b>Don't know</b>	<b>Total</b>
<b>Settlement size</b>	Capital	61%	36%	3%	<b>100%</b>
	Between 20,000 and 150,000 inhabitants	67%	27%	6%	<b>100%</b>
	Less than 20,000 inhabitants	56%	42%	2%	<b>100%</b>
<b>Gender</b>	Male	61%	36%	3%	<b>100%</b>
	Female	58%	39%	3%	<b>100%</b>
<b>Age group</b>	15-34 years	78%	20%	2%	<b>100%</b>
	35-54 years	54%	42%	4%	<b>100%</b>
	55 years & above	36%	58%	6%	<b>100%</b>
<b>Education level</b>	Low/medium level	57%	39%	4%	<b>100%</b>
	High level	68%	29%	3%	<b>100%</b>
<b>Employment status</b>	Employed / Self-employed	60%	37%	3%	<b>100%</b>
	Unemployed or temporarily not working / inactive	58%	38%	4%	<b>100%</b>
<b>Geographical area</b>	Centre	60%	36%	4%	<b>100%</b>
	North	65%	35%	0%	<b>100%</b>
	South	52%	43%	5%	<b>100%</b>
<b>Total</b>		<b>60%</b>	<b>37%</b>	<b>3%</b>	<b>100%</b>



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