



ANNUAL SURVEY REPORT: REGIONAL OVERVIEW

3rd Wave (Spring 2018)

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

June 2018

STRONGER
TOGETHER



TABLE OF CONTENTS

1. Background	3
2. Research methodology in brief	4
3. Survey findings	5
3.1. Executive summary	5
3.2. Perceptions of the European Union	10
3.2.1. General perceptions of the EU	10
3.2.2. EU relations with EaP countries and awareness of EU financial support	14
3.3. Sources of information on the EU	23
3.3.1. Media usage as sources of information	23
3.3.2. Sources of information about the EU	26
3.4. Views of residents of EaP countries on current situation and future expectations	33
3.4.1. View of country's current situation	33
3.4.2. Future expectations	36
3.5. Profiling attitudes towards the EU: positive versus neutral	39
3.5.1. Positive attitudes	39
3.5.2. Neutral attitudes	44
4. Annex	48



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 Partner (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 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.

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 **Annual Survey – 3rd wave (spring 2018) cumulative macro report of the surveys conducted in the six EaP countries**¹ and covers the following broad topics:

- General perceptions of the EU
- Values associated with the EU
- Assessment of EU relations with the Eastern partner countries
- 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 3rd wave of the survey, which also provides comparisons between the findings of the 2018, 2017 and 2016 surveys where relevant.

¹ A similar report has been produced for each Eastern partner country.

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 settlements² and three areas 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 age³ 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 walk⁴ 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, geographical area, education level, religious faith and mother tongue).

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

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

⁴ 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

- The European Union tends to conjure up a positive – or at least neutral – image in the six EaP countries surveyed. Overall, 46% of citizens have a positive image of the EU, 37% are neutral and only 13% are negative about it. Awareness of the EU is also very high and only 4% of people are ‘not aware of’ or ‘have never heard about’ the EU (down 6% since 2016).
- Half of Armenians (48%), Georgians (49%), Moldovans (48%) and Ukrainians (49%) have a positive perception of the EU – among which Georgians are the most positive, with only 5% of citizens negatively oriented. Positive perception is least common among Belarusians (34%), with as many as 43% of Belarusian citizens neutral and 18% are negative. Azerbaijanis have the highest share of uninformed citizens (17%), with most citizens fairly equally split between positive (39%) and neutral stances (32%).
- EaP citizens attach paramount importance to peace, security and stability (63%), which, despite not being the most strongly associated value, is still closely linked with the European Union, by 68% of citizens. Economic prosperity and human rights are respectively the second and the third most important personal values for EaP citizens. Like in 2016 and 2017, most of the population tend to associate the EU with all values – with ‘absence of corruption’ collecting the lowest level of positive links (58%).
- The EU is the most trusted foreign institution and the only one trusted by the majority of EaP citizens (61%, up 4% since 2017), confirming the finding that sees it strongly associated with all positive values. Half of EaP citizens also trust the United Nations (UN 50%), whereas a substantial proportion of citizens do not trust the North Atlantic Treaty Organization (NATO 49%) or the Eurasian Economic Union (EEU 43%).
- At country level, the EU enjoys the highest levels of trust in Georgia (73%) and Armenia (70%), where it has also recorded an increase of 7 and 5 percentage points respectively since the 2016 & 2017 surveys. Around two thirds (65%) of Moldovans and Ukrainians also trust the EU, while the levels of trust are considerably lower in Belarus (47%) and, particularly, in Azerbaijan (40%).

EU relations with EaP countries and awareness of EU financial support

- Overall, 63% of EaP citizens believe that relations between their country and the EU are ‘good’, 21% consider them to be ‘bad’ and 16% did not comment on the quality of the relations or were not aware of them. Georgians, Armenians and Moldovans are the most positive (83%, 80% and 74% of citizens respectively assessed the relations as ‘good’), whereas the figure is just 50% in Belarus. In Ukraine and Azerbaijan, nearly one in five citizens did not provide a definite answer.
- In comparison to last year, more citizens are aware of the financial support provided by the EU to their countries, with this figure now rising back towards 2016 levels (57% in 2018 versus 53% in 2017 and 62% in 2016). A shift was also recorded from ‘don’t know’ to ‘negatives’ as one in four citizens are now convinced that the EU does not support their country (26%, up 7 percentage points).

- Ukrainians (60%), Georgians (67%), Armenians (69%) and particularly Moldovans (87%) are more likely to acknowledge the EU's financial support compared to Belarusians and Azerbaijanis, among whom only 44% and 29% of citizens respectively share the same opinion.
- EaP citizens who are aware of the EU's financial support are almost equally divided between those who consider it effective (48%) and those who do not (47%), with a slight increase in positive opinions compared to last year (up 5%). Ukrainians and Belarusians are the most likely to find EU support ineffective (52% and 48% respectively), while Azerbaijanis and Armenians are the most positive (78% and 66% respectively). Georgians are also mostly positive (59%), although negative opinions have increased from 20% to 34% since 2017. A huge increase in positive opinions was recorded in Moldova, where currently 55% of citizens deem the EU's support effective (up 18% since 2017).
- Nearly half of EaP citizens who are aware of the EU's financial support know at least one specific programme financed by the EU in their home country (46%) and awareness has greatly increased since 2017 (up 11%). Awareness of specific programmes is highest in Belarus (54%) and lowest in Azerbaijan, where only one in five citizens could mention at least one programme financed by the EU in their country (21%) – around half the proportion of those who were able to do so last year (38%).
- The most frequently recalled programmes are in the field of education (42%); these are in fact the most recognised programmes in Armenia, Azerbaijan, Belarus and Ukraine. Health and medicine programmes – the second most mentioned programmes, by 35% of EaP citizens – have recorded the greatest increase (up 12%) and are particularly well known in Georgia. One in four EaP citizens also mentioned infrastructure development programmes (26%) – interestingly, in Moldova they were cited by 61% of the population.
- When asked to compare the support provided by different international donors, between one in five and one in four citizens did not have a clear opinion on the issue. The International Monetary Fund/World Bank is perceived as a more important donor than the EU by 33% of EaP citizens, while half of EaP citizens are also convinced that the United States and the UN support their countries more than or to the same extent as the EU (55% and 51% respectively). Conversely, 47% of EaP citizens feel that the Russian Federation supports their country less than the EU – only Armenians and Belarusians perceive the Russian Federation as a greater contributor than the EU (49% and 61% respectively), whereas virtually no one in Georgia and Ukraine shares the same opinion (3% in both countries).
- As in previous waves, tourism was considered as the area benefitting most from EU support, and more so compared to last year (57%, up 12%). The strengthening of tourism was well perceived in all countries, particularly in Georgia (81%, up 11% since 2017). The appreciation in this regard of access to more products and services (49%, up 7%) and improved trade (48%, up 9%) has also recorded an increase since 2017. For the third year in a row, the EU's contribution to fighting corruption was seen as the least effective area of support – only 19% of EaP citizens deemed it effective – although an improvement of 7 percentage points was recorded.
- According to 52% of EaP citizens, the EU should play a greater role in supporting economic development. Around 40% would favour more support to employment opportunities (37%), and reducing corruption (36%), while 28%, 22% and 19% of EaP citizens respectively would like the EU to support their country's healthcare system, education sector and agricultural production. EU support to reducing corruption is heavily favoured in Moldova and Ukraine and was mentioned by around 45% of citizens in both countries.

Media usage as sources of information

- Nearly all EaP citizens use television (92%), and more so compared to 2017 (up 7%). The second most popular information source is 'word of mouth', which is generally used by 85% of the population.

New media, such as the Internet and social media, have recorded an increase compared to last year and are currently used by 64% and 57% of the population respectively. Print media and the radio are used by 54% and 50% of EaP citizens respectively, although only 5% always rely on them. As for the official EU website – 86% of residents of the EaP countries never use it, with no change compared to 2017.

- The vast majority (85%) of EaP citizens rely on their country's media in the national language, with 33% always using such media, followed by the country's media in Russian (72%, of which 15% always). Foreign media sources in Russian are also used by 43% of EaP citizens, whereas media in other languages, be it the country's media or foreign media, are never used by around 80% of EaP citizens.
- Belarusians – most of whom have access to free Russian broadcasting in their daily lives – are the most likely to rely on media in Russian (81%) and more so compared to 2017 (up 10%). Media in Russian are also quite popular in Moldova, Ukraine and Armenia (58%, 50% and 46% of citizens respectively). Azerbaijanis and Georgians are less frequent users of media in Russian (26% and 14% of citizens respectively), with over 80% of the population frequently relying on media in their national language. As for media in foreign languages other than Russian, they are most popular in Armenia (22%), Georgia (18%) and Moldova (18%), where around one in five citizens frequently rely on such sources.

Sources of information about the EU

- Half of EaP citizens (52%) state they have seen or heard some information about the EU in the last three months. Passive exposure is particularly significant in Moldova (75%), followed by Ukraine (57%), Belarus (54%) and Georgia (44%), whereas only a third of citizens were reached by EU-related information in Armenia (36%) and less than a fifth in Azerbaijan (19%). Most of the EU-related information comes from television (74%), although a significant increase in passive exposure through the Internet has been recorded this year (41%, up 10% since 2017).
- Over half of EaP residents (55%) feel that the EU is positively represented in their national media, with no substantial changes compared to last year. Half of EaP residents also think that the information they read, watch or access online helps them 'very much' or 'fairly' to have a better understanding of the EU (51%). Armenians, Moldovans and Ukrainians are the most satisfied with the quality of the information (around 60% each) and Belarusians the least satisfied (23%).
- Active exposure to EU-related information has increased by 7 percentage points in the course of this past year and now stands at 48%; however, 52% of EaP citizens never look for/access information on the EU and only 16% access it frequently (12%) or very frequently (4%). Television and the Internet are the most important sources for searches (59%), with the Internet recording a 7% increase since 2017.
- Moldovans are the most likely to access information on the EU (61%, 31% of which frequently access it), while Moldova also has the highest figure for passive exposure (75%). Around half of Armenians, Azerbaijanis, Georgians and Ukrainians are also likely to engage in EU-related searches, whereas only a quarter of Belarusians access/search for information on the EU.
- Half of active searchers access EU-related information in their national language, 47% in Russian and 3% in English. As in 2017, around a third of citizens search for economic news (36%), general information (33%), social and political news (32%) and EU relations with their home country (30%). Between 15% and 25% are also interested in the lifestyles in EU Member States (25%), educational and cultural programmes (20%) and opportunities offered by the EU (16%), while only 6% of EaP citizens are interested in the EU's relations with EaP countries in general.
- Like in 2017, most active searchers rate the EU-related information they access as being accessible (29% 'very' and 59% 'fairly') and user-friendly (29% 'very' and 58% 'fairly'). They also find the

information ‘comprehensive’ (81%), ‘reliable’ (78%) and ‘trustworthy’ (76%). Compared to last year, their assessment appears to be slightly more positive for all the assessed indicators.

View of country’s current situation

- Trust levels towards the different government institutions and political parties have slightly increased since 2017; nevertheless, EaP citizens continue to share a low level of trust in their institutions, and the religious authority appears to be the only one towards which trust exceeds distrust (57% versus 34%). Regional and local public authorities are the most trusted government bodies (among 42% of EaP citizens), whereas trust in political parties is lowest (19%). Around one in four EaP citizens trust the Parliament (26%) and one in three the government (32%).
- 65% of EaP citizens appear to be ‘not very’ or ‘not at all’ satisfied with the way democracy works in their country, with no significant change compared to 2017. Levels of satisfaction are highest among Azerbaijanis (48%) and Belarusians (42%), who are incidentally the most confident citizens towards their own institutions. Moldovans, by contrast, are the most dissatisfied (81%).
- A slight improvement was recorded in terms of the path towards democratic governance, while the hierarchy of elements that EaP citizens believe to apply to their country is largely consistent with last year’s findings. In fact, the only element that a majority of citizens feel that applies to their country is gender equality (57%, up 4% since 2017). Over 40% also believe that freedom of the media (44%, up 3%), freedom of speech (43%, up 2%), and protection of the rights of minorities (41%, up 5%) exist in their country. Lack of corruption is seen as the most problematic issue – 47% of EaP citizens say it ‘does not apply’ to their country and for 31% it ‘does not really apply’.

Future expectations

- In line with the past trend, EaP citizens seem to be slightly more optimistic about their own futures (56%) compared to the future of their country (46%). Georgians and Azerbaijanis are the most optimistic about their country (61% and 59% respectively), as opposed to Moldovans (50%), Belarusians (45%), Ukrainians (42%) and particularly Armenians (34%).
- Unemployment appears to be the most pressing problem for 44% of EaP citizens, followed by low living standards and poverty (40%) and low salaries and pensions (36%). One third of EaP citizens are also worried about the economic crisis (31%) and corruption (29%), while 26% named security issues and war and high prices and taxes and 11% the unaffordability of health-care.
- Unemployment is the most common concern in Georgia and Azerbaijan (81% and 72% respectively). Corruption (48%) and low salaries and pensions (49%) represent the most pressing issues in Moldova, whereas in Ukraine 45% of citizens mentioned low living standards and poverty. It should also be noted that 24% and 30% of citizens of Armenia and Moldova respectively included migration among the most pressing problems facing their own country.

Profiling attitudes towards the EU: positive versus neutral

- EaP citizens with a positive view of the EU account for nearly half of all EaP citizens (46%). Compared to citizens with a neutral view of the EU (37% of the EaP population), they tend to be slightly more concentrated among men (49% versus 43%), in the youngest age group (40% are aged 15 to 34 years versus 34%) and among the most educated (40% have a high level of education versus 28%). They are slightly more likely to live in smaller settlements (50% versus 46%) and definitely more likely to be native speakers of their national language (77% versus 69%). On the contrary, neutral individuals are more likely to be native Russian speakers (29% versus 22%). No peculiarity was assessed in terms of employment status, whereas for nationality, EU supporters are more concentrated among Ukrainians (63% versus 58%) and neutral citizens among Belarusians (17% versus 11%).

- EU supporters are more likely to be actively and passively exposed to information about the EU than neutral citizens: 62% of them had seen or heard information about the EU in the three months preceding the survey and 60% look for/access information on the EU frequently or very frequently – the respective figures in the neutral population stand at 48% and 44%.
- EU supporters are keener users of new media – 63% frequently use the Internet and social media (compared to 49% of the neutral population) and less frequent users of traditional media only (30% versus 40%) or no media (7% versus 11%). EU supporters are also less frequent users of Russian media (45% versus 50% of neutral citizens) and keener users of media in their national languages (60% versus 56%) or other foreign languages (13% versus 7%).
- Neutrality is linked with lower levels of trust in all foreign institutions; in fact, trust prevails over distrust only for the European Union, as 51% of neutral EaP citizens trust the EU (versus 84% of EU supporters). 40% of neutral citizens trust the UN (versus 69% of the overall population), with an equal level of distrust; 21% trust NATO (versus 55%), with a 57% level of distrust; and 29% trust the EEU (versus 37%), with 41% of neutral EaP citizens oriented towards distrust.
- The assessment of the relations between EaP countries and the EU and the acknowledgement of the EU's financial support is again less positive: 61% of neutral citizens would describe the relations between their country and the EU as 'good', 51% acknowledge the EU's financial support and 44% consider it as effective (versus 80%, 70% and 57% respectively for EU supporters).
- When it comes to the assessment of common beliefs, individuals holding a neutral image of the EU are again less positive than both EU supporters and the general EaP population – in fact, the level of agreement for all statements does not exceed 63% (84% for EU supporters).
- Neutral individuals are also less optimistic than EU supporters and the overall EaP population, with 61% openly pessimistic towards their country's future and 48% towards their personal future (the figures are 58% and 67% respectively for EU supporters).
- Individuals with a neutral stance are in fact more concerned about unemployment (46%, their greatest concern), low living standards and poverty (40%), low salaries and pensions (38%), high prices and taxes (30%) and the unaffordability of healthcare (12%) than EU supporters. These issues, which seem to have a more immediate effect on their everyday lives, may well reflect real difficulties, thus accounting for both their greater pessimism and their more indifferent view towards the EU. Finally, neutral individuals seem slightly less worried about corruption (26%), security issues/war (25%) and territorial conflicts (7%) than EU supporters.

3.2. Perceptions of the European Union

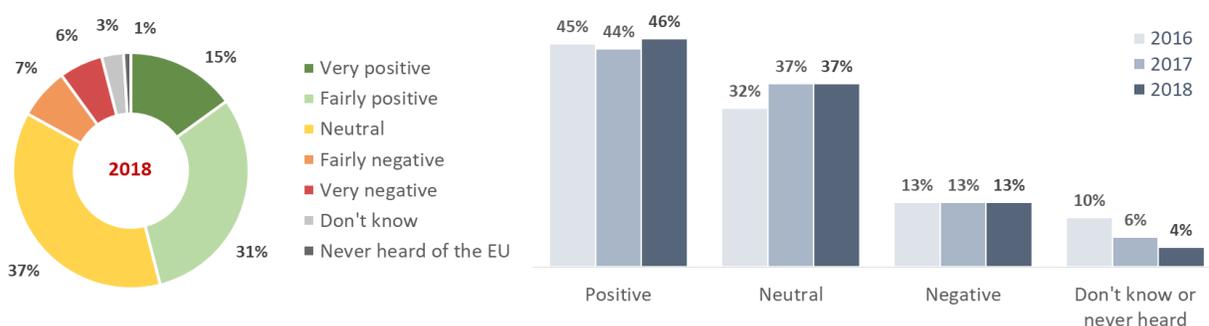
Nearly half of EaP citizens have a positive image of the European Union (46%), 37% feel neutral about it and only 13% hold a negative view. Awareness of the EU is also very high and only 4% of people are ‘not aware of’ or ‘have never heard about’ the EU (down 6% since 2016). Georgians are the most positive (49%), with 43% neutral and only 5% negatively oriented, whereas Belarusians are the least positive (34%), with 43% of citizens neutral and 18% negative. The EU is the most trusted foreign institution and the only one trusted by the majority of EaP citizens (61%, up 4% since 2017), confirming the finding that sees the European Union strongly associated with all positive values. At country level, the EU enjoys the highest levels of trust in Georgia (73%) and Armenia (70%). Around 60% of EaP citizens also believe that relations between their country and the EU are ‘good’ (63%) and are aware of the financial support provided by the EU to their countries (57%). As in previous waves, tourism was considered as the area benefitting most from EU support and more so compared to last year (57%, up 12%). More citizens also appreciated the access to more products and services (49%, up 7%) and the effect on trade (48%, up 9%). Corruption is seen as the area that has least benefitted from the EU’s support for the third year in a row, and 36% of citizens would expect greater involvement of the EU to tackle the issue.

3.2.1. General perceptions of the EU

The European Union tends to conjure up a positive – or at least neutral – image in the six EaP countries surveyed. Overall, 46% of citizens have a positive image of the EU, 37% are neutral and only 13% are negative about it. The awareness of the EU is also very high, as only 4% of people are not aware of or have never heard about the EU (down 6% since 2016). Overall, the perceptions are consistent with last year’s findings.

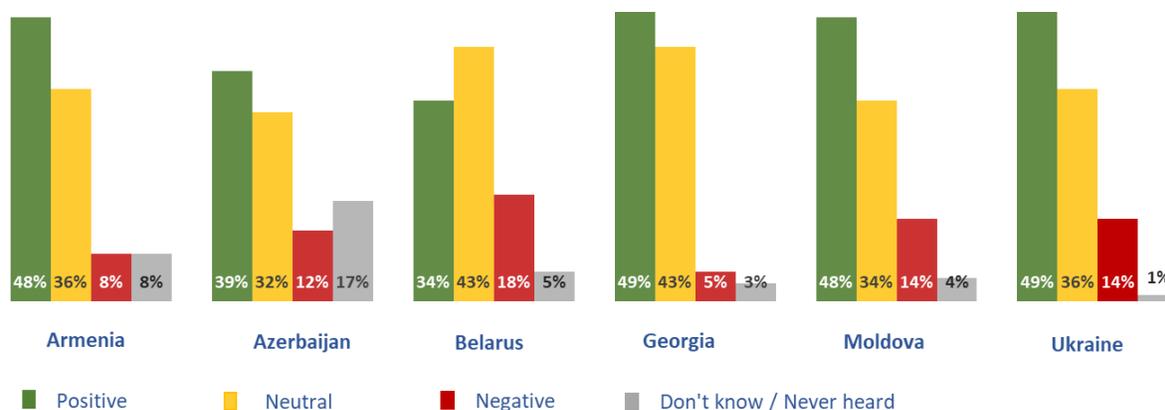
Nearly half of the population in Armenia (48%), Georgia (49%), Moldova (48%) and Ukraine (49%) have a positive perception of the EU. Among these, the most positively oriented are Georgians, as only 5% express a negative attitude. On the contrary, the share of positively disposed people is lowest among Belarusians (34%), with as much as 43% of citizens taking a neutral position and 18% openly negative. Azerbaijan has the highest share of uninformed citizens (17% are not aware of or have never heard about the EU), with most citizens fairly equally split between positive (39%) and neutral stances (32%)⁵.

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



⁵ The high share of citizens who are ‘not aware’ of or have ‘never heard’ about the EU can be linked to the low level of passive exposure assessed in Azerbaijan. In fact, only 19% of citizens said that they had heard about the EU in the three months preceding the survey – which is much lower than in the other EaP countries. It should be noted that the level of awareness of the EU in the country has always been and remained significantly lower than in other EaP countries during past waves. Quality check procedures were carried out on 2016 data and in 2017 the questionnaire was tested, following a cognitive test, and refined to include all the most common translations for the expression ‘European Union’ and capture all people who are knowledgeable about the EU.

FIGURE 2 – Do you have a ‘very positive’, ‘fairly positive’, ‘neutral’, ‘fairly negative’ or ‘very negative’ image of the European Union? (Q2.1) – Country specific picture



The comparison between the values which are strongly associated with the EU and the three most important values at a personal level⁶ – depicted in Figure 3 – shows that EaP citizens attach most importance to peace, security and stability (63%), which, despite being not the strongest association, is still closely linked with the European Union by 68% of the citizens.

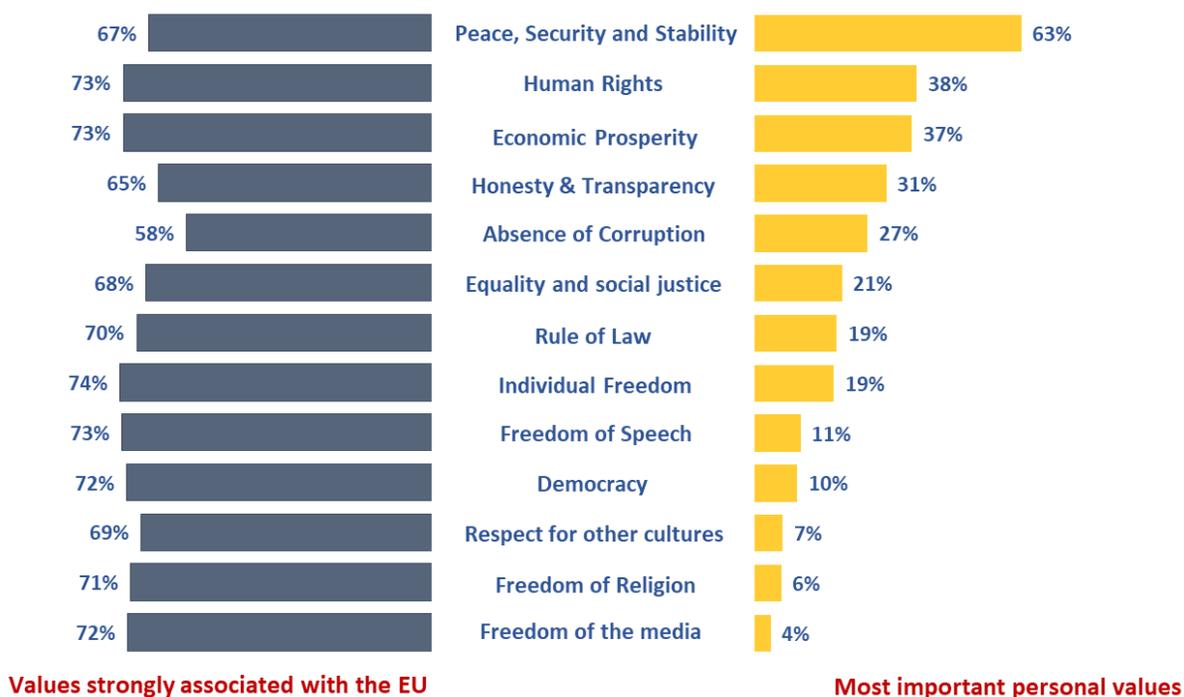
‘Economic prosperity’ and ‘human rights’ are respectively the second and the third most important personal values for EaP citizens, chosen by around 40% each. Respect for other cultures, freedom of religion and freedom of the media, on the other hand, were the least frequently mentioned (by less than 10% of EaP citizens). Like in 2016 and 2017, most of the population tend to associate the EU with all values – especially individual freedom, human rights, economic prosperity, freedom (of speech, of the media, of religion), democracy and rule of law (all above 70%). For the third year in a row, absence of corruption has the lowest level of positive associations, although 58% of EaP citizens still link it ‘strongly’ or ‘very strongly’ with the EU.⁷

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

⁷ In fact, the EU’s contribution to tackling corruption was mostly acknowledged by EaP citizens and when explicitly asked if the EU is committed to fighting corruption, the majority of the population (66% of EaP citizens) strongly or somewhat agreed with the proposed statement. See Fig. 17.

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

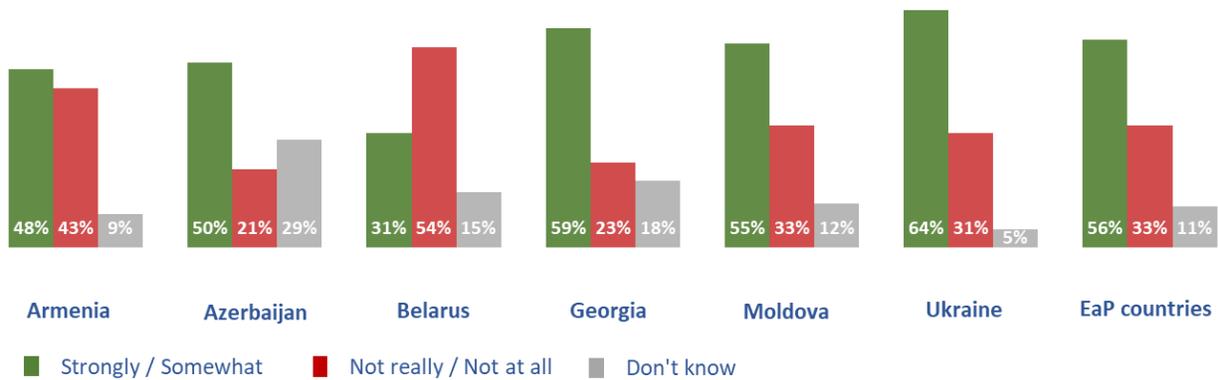
(Percentages refer to citizens who have heard of the EU)



Most EaP citizens are also confident that ‘the EU fosters the preservation of traditional values in [their] society’ (56%).⁸ One in three (33%) do not agree with the statement and one in ten (11%) do not have a definite opinion. Ukrainians, Georgians and Moldovans, who on average are the most positively-oriented towards the EU, are in fact those more inclined to agree with the statement – with only between one in four and one in three citizens in open disagreement. Armenians seem fairly equally split between agreement (48%) and disagreement (43%), whereas Belarusians – the most neutral towards the EU – do not generally view the EU as preserving traditional values (54%). In Azerbaijan, half of the population tend to agree with the statement, with the other half unaware (29%) or in open disagreement (21%).

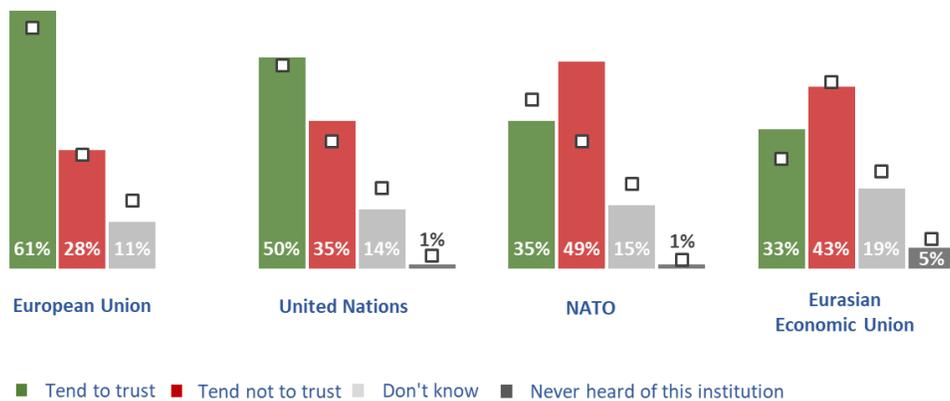
⁸ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘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 the country’s security and stability’.

FIGURE 4 – ‘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 citizens who have heard of the EU)



The EU is the most trusted foreign institution and the only one trusted by the majority of EaP citizens (61%, up 4 percentage points since 2017), confirming the finding that sees it strongly associated with all positive values. Half of EaP citizens are also likely to trust the UN (50%, up 2 percentage points), whereas more citizens are inclined towards not trusting NATO (49% versus a 35% share of trust) and the EEU (43% versus a 33% share of trust).

FIGURE 5 – Trust towards different institutions (Q2.11)
(Percentages refer to citizens who have heard of the EU)



At country level, the EU enjoys the highest levels of trust in Georgia (73%) and Armenia (70%), where it has also recorded an increase of 7 and 5 percentage points respectively since 2016 and 2017. Around 65% of Moldovans and Ukrainians also trust the EU, while levels are definitely lower in Belarus (47%) and particularly in Azerbaijan (40%). However, it should be noted that while in Azerbaijan the EU is still the most trusted foreign institution (with the United Nations trusted by around one in three citizens and NATO and the EEU by around one in four citizens), Belarusians display the same level of trust towards the EEU (47%) and the United Nations (46%). High levels of trust towards the EEU were also recorded in Armenia (48%) and Moldova (44%). NATO generally has lower levels of trust, except for in Georgia (61% of citizens). In Belarus, only 16% of citizens trust NATO, the lowest level of all EaP countries.

TABLE 1 – Trust towards different institutions (Q2.11)

Q2.11. I would like to ask you a question about how much trust you have in certain institutions. (Percentage of the population who answered "tend to trust")							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
European Union	70%	40%	47%	73%	64%	66%	61%
United Nations	58%	31%	46%	62%	40%	54%	50%
NATO	24%	25%	16%	61%	30%	40%	35%
Eurasian Economic Union	48%	27%	47%	24%	44%	29%	33%

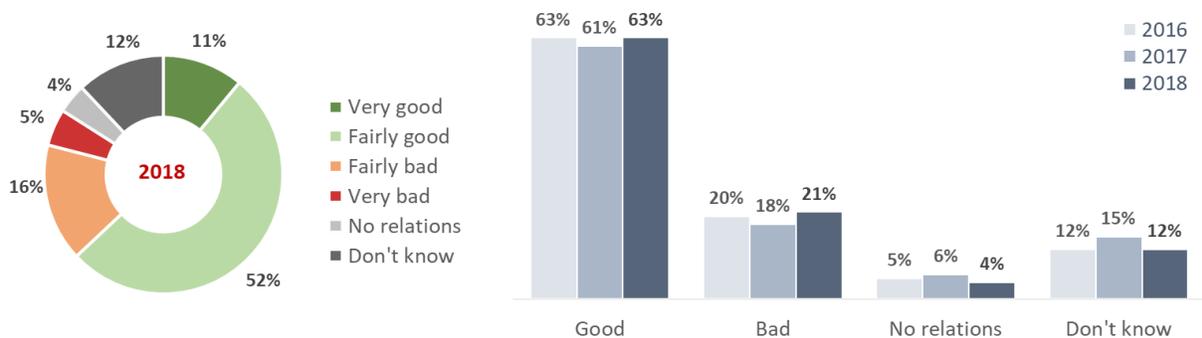
Percentages refer to EaP citizens who have heard of the EU

3.2.2. EU relations with EaP countries and awareness of EU financial support

Overall, 63% of EaP citizens believe that relations between their country and the EU are 'good'. However, a fifth (21%) still believe the relations to be bad and another 16% did not comment on the quality of the relations or were not aware of them. These findings are in line with past waves.

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

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

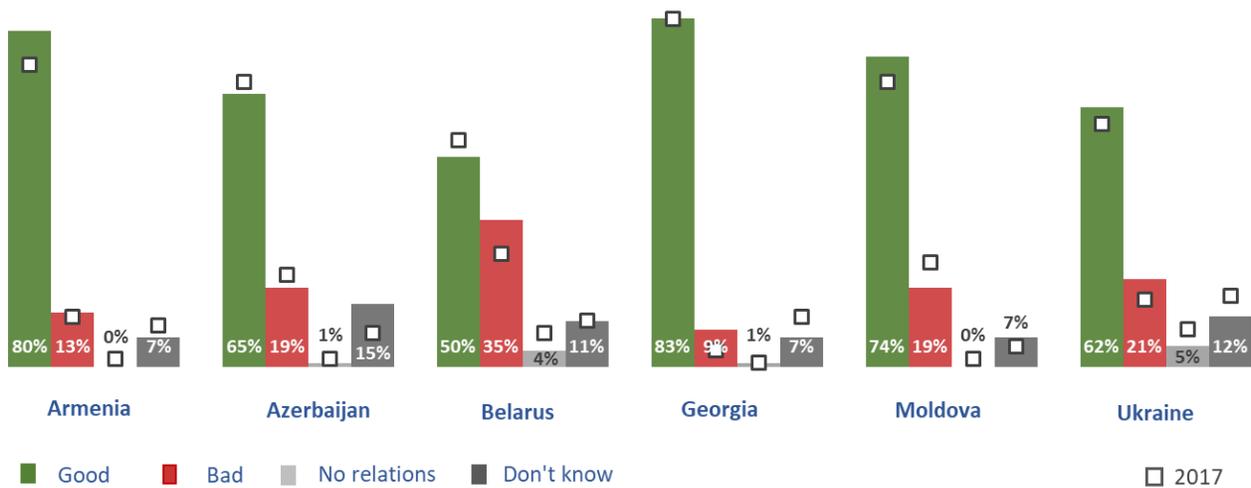


On average, residents of Georgia, Armenia and Moldova tend to perceive the relationship between the EU and their countries in the most positive light, with 83%, 80% and 74% of citizens respectively assessing it as 'good'. 65% of Azerbaijanis and 62% of Ukrainians express a positive opinion on the nature of the relationship, whereas the share of supporters drops to 50% in Belarus. In fact, one third of Belarusians are convinced that the relations between their country and the EU are 'bad' (35%) and a 15% share did not comment on the quality of the relations or were not aware of them. The most uncertain/unaware individuals appear to be those living in Ukraine and Azerbaijan – 17% and 16% of citizens respectively.

Compared to last year, a positive or steady trend was recorded in Armenia (up 8% since 2017), Georgia (steady since last year), Moldova (up 6%) and Ukraine (up 4%); whereas a slight decrease in positive opinions was recorded in both Azerbaijan (down 3%) and Belarus (down 4%).

FIGURE 7 – In general, how would you describe the relations that the European Union has with your country? (Q2.4) – Country specific picture

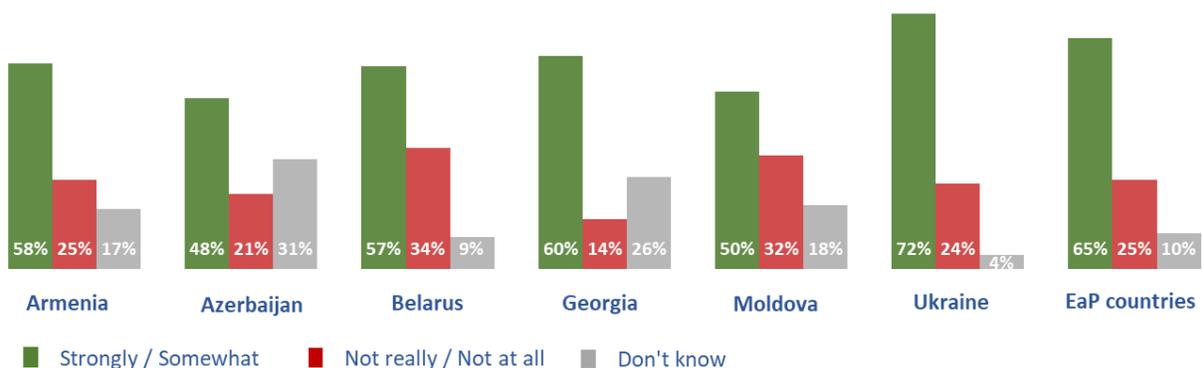
(Percentages refer to citizens who have heard of the EU)



Most EaP citizens are confident that ‘the EU is an independent actor in foreign relations’ (65%). One in four (25%) do not agree with this statement and one in ten (10%) do not have a definite opinion. Ukrainians are in fact those more inclined to agree with the statement – with only 24% of citizens in open disagreement and 4% not commenting on the statement. Georgians, Armenians and Belarusians are also mostly inclined towards agreement (60%, 58% and 57% of the population), whereas Azerbaijanis and Moldovans seem nearly equally split between agreement (48% and 50% respectively) and disagreement (21% and 32% respectively) or unawareness (31% and 18% respectively). Azerbaijanis are in fact the most unaware/undecided on the issue, with 31% of the population not providing a definite answer. Also, one in four Georgians would not confirm their agreement/disagreement to the proposed statement.

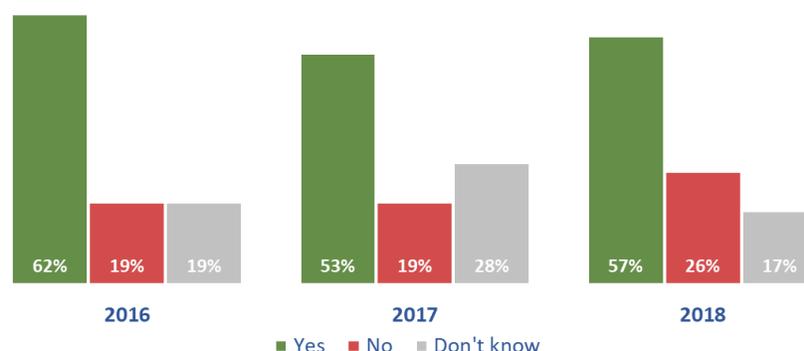
FIGURE 8 – ‘The EU is an independent actor in foreign relations’. To what extent do you agree with this statement about the EU?

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



In general, a slightly higher proportion of people compared to last year are aware of the financial support provided by the EU to their countries, with figures rising back towards to 2016 levels (57% in 2018 versus 53% in 2017 and 62% in 2016). A shift was also recorded from unaware to negative opinions and, currently, one in four citizens are convinced that the EU does not provide financial support to their country (26%, up 7 percentage points).

FIGURE 9 – As far as you know, does the European Union provide your country with financial support? (Q2.5)
(Percentages refer to citizens who have heard of the EU)



Ukrainians (60%), Georgians (67%), Armenians (69%) and particularly Moldovans (87%) tend to acknowledge the EU’s financial support more frequently compared to Belarusians and Azerbaijanis, among whom only 44% and 29% of citizens respectively share the same opinion. Moreover, around 40% of Belarusians and Azerbaijanis do not recognise the EU’s financial support, with an additional 15% and 31% of the respective populations not able to provide a definite answer to this question.

TABLE 2 – Provision of financial support by the EU

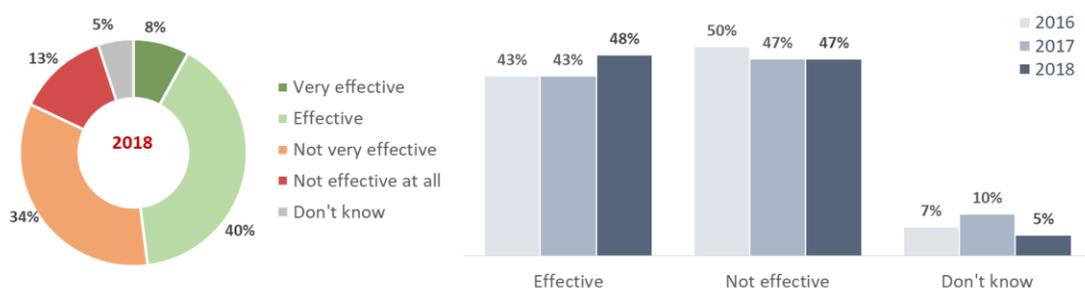
Q2.5. As far as you know, does the European Union provide your country with financial support?							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
Yes	69%	29%	44%	67%	87%	60%	57%
No	18%	40%	41%	5%	4%	25%	26%
Don't know	13%	31%	15%	28%	9%	15%	17%
Total	100%	100%	100%	100%	100%	100%	100%

Percentages refer to citizens who have heard of the EU

As for the effectiveness of financial support, EaP citizens who are aware of it seem to be fairly equally split between those who consider it effective (48%) and those who do not (47%), with a slight increase in positive opinions compared to last year (up 5 percentage points). Only 5% of citizens could not come up with a definite answer – half the proportion who answered ‘don’t know’ in 2017.

FIGURE 10 – How effective do you think the support has been? (Q2.5.1) – Regional overview

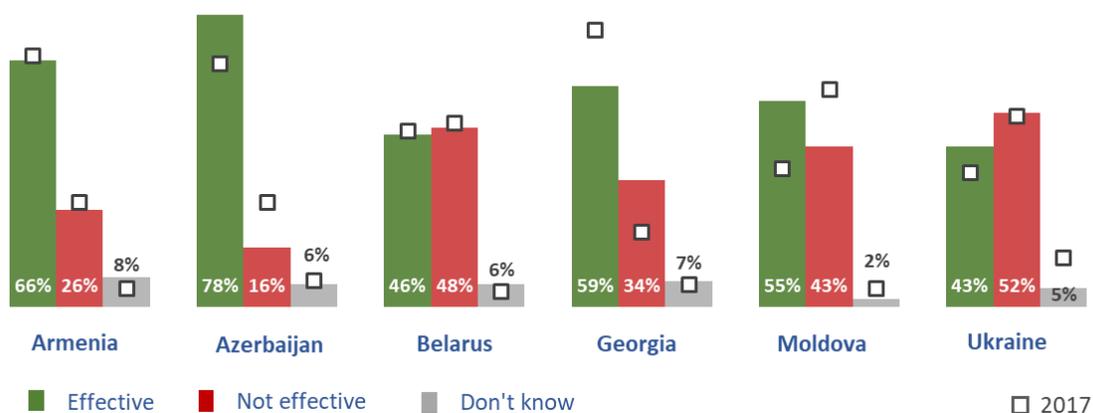
(Percentages refer to citizens who were aware of the EU's financial support)



The populations in Ukraine and Belarus are the most likely to find EU support ineffective (52% and 48% respectively). On the other hand, in Azerbaijan and Armenia respectively 78% and 66% of citizens who are aware of EU's support deem it to be effective, versus 16% and 26% respectively who hold the opposite opinion. It should also be noted that negatively oriented Azerbaijanis have decreased considerably since last year, by 12 percentage points. Georgians are also mostly positive with regard to the EU's financial support (59%); however, the share of negatively oriented citizens has increased from 20% to 34% in the course of this past year. As for Moldova, a huge increase in positive opinions has been recorded since 2017 and, currently, the majority of Moldovans deem EU's support effective (55%, up 18% since 2017).

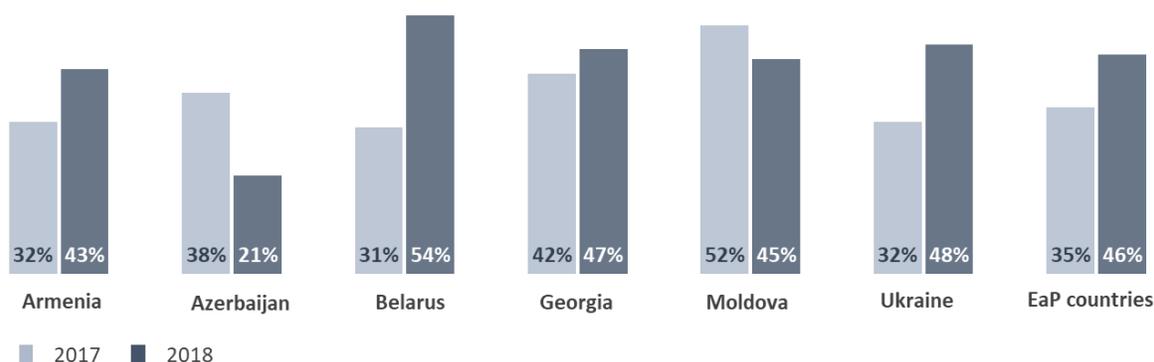
FIGURE 11 – How effective do you think the support has been? (Q2.5.1) – Country specific picture

(Percentages refer to citizens who were aware of the EU's financial support)



Nearly half of EaP citizens who are aware of the EU's financial support know at least one specific programme financed by the EU in their home country (46%) and awareness has greatly increased since 2017 (up 11%). Awareness of specific programmes is highest in Belarus, where 54% of citizens could recall one or more programmes financed by the EU, and relatively high (around 45%) in all EaP countries except Azerbaijan, where only one in five citizens could mention at least one programme financed by the EU in their country (21%) – just over half of those who did last year (38%).

FIGURE 12 – Do you know of any specific programmes financed by the European Union in your country? (Q2.6) – Percentage of ‘YES’ responses
(Percentages refer to citizens who were aware of the EU’s financial support)



Like in 2017, the most recalled programmes are in the field of education (42%, up 4% since 2017). These are in fact the most recognised programmes in Armenia, Azerbaijan, Belarus and Ukraine. Health and medicine programmes – the second most mentioned programmes at overall level – have recorded the greatest increase – 35% of EaP citizens mentioning them compared to 23% in 2017. Programmes in the field of health and medicine are particularly well known in Georgia, where 49% of citizens aware of the EU’s support mentioned them. Other frequently mentioned programmes relate to the fields of economic reforms/business promotion (29%, down 5%), infrastructure development projects (26%, down 3%), justice reforms/police reforms (21%, up 2%) and culture (19%, down 6%). The most cited projects in Moldova were those in the field of infrastructure development (mentioned by 61% of the population).⁹

As for personal involvement with an EU-funded project in the past twelve months, only 4% of EaP citizens were personally involved, with no significant difference between individual countries.

FIGURE 13 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)
(Percentages refer to citizens who were aware of the EU’s financial support)



Residents of EaP countries were also asked to compare the support provided by different international donors with the support provided by the EU. The first thing that should be noted is that the level of confidence in answering the question – measured by the share of individuals who could provide a definite

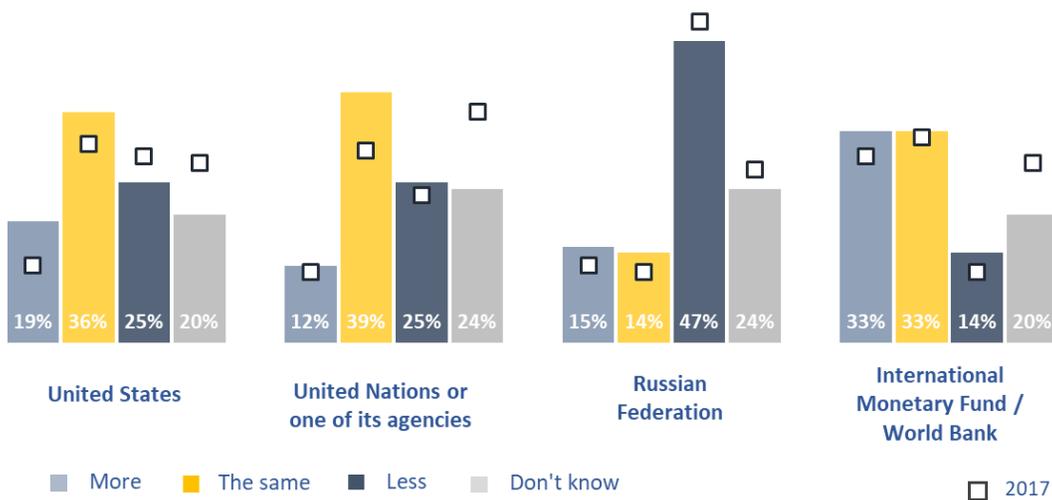
⁹ More details about country data are provided in Annex, Table A1.

answer – is slightly higher for the United States and the International Monetary Fund/World Bank (for which 80% of EaP citizens answered the question) than for the United Nations and the Russian Federation (76% each). Secondly, compared to 2017, the level of confidence has largely increased for the UN, the International Monetary Fund/World Bank and the United States, whereas it has remained quite stable for the Russian Federation.¹⁰

Like in 2017, the International Monetary Fund/World Bank is perceived as a greater provider of financial support than the EU by around a third of EaP citizens (33%) – and particularly by Ukrainians (44%). Conversely, every second EaP citizen feels that the Russian Federation supports their country less than the EU (47%). Only the citizens of Armenia and Belarus perceive the Russian Federation as a greater contributor than the EU to their countries (49% and 61% respectively), whereas virtually no one in Georgia and Ukraine shares the same opinion (3% of citizens in both countries).

Over half of EaP citizens are also convinced that the United States supports their countries ‘more than’ or ‘to the same extent’ as the EU (55%) – with Ukraine (66%) and Georgia (65%) top of the list and Azerbaijani at the bottom (20%). The UN and its agencies are also perceived as a stronger or equal provider of financial support by most EaP citizens (51%) – with Ukrainians again in top position (58%) and Azerbaijan bottom (24%). In this regard, it should be noted that Azerbaijanis are also those providing the greatest share of unaware/undecided responses – around 50% of EaP citizens chose ‘don’t know’ in response to all questions.

FIGURE 14 – 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 citizens who have heard of the EU)



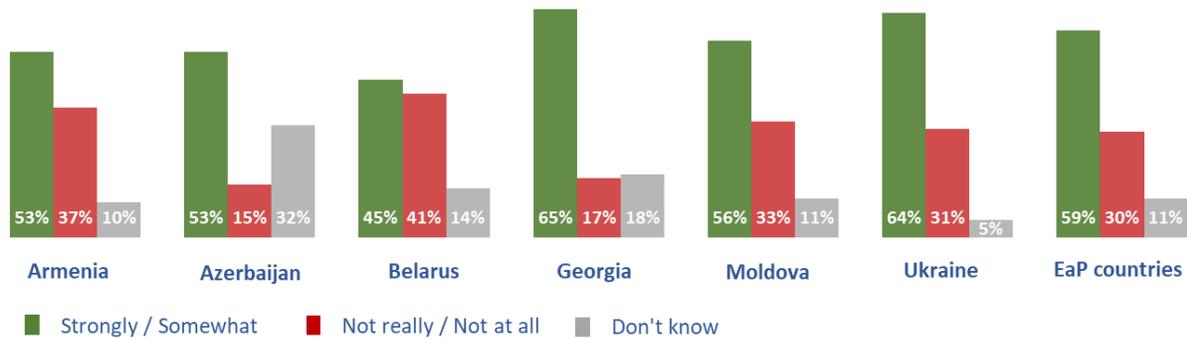
Most EaP citizens are confident that ‘the EU provides tangible benefits to citizens in their everyday lives’ (59%). Around one in three (30%) do not agree with the statement and one in ten (11%) do not have a definite opinion.

Georgians and Ukrainians are the most likely to agree with the statement (65% and 64% respectively), but while the remaining Ukrainians are mostly negative (31%), the rest of Georgians are equally split between open disagreement (17%) and indecision/unawareness (18%). Most Armenians (53%), Azerbaijanis (53%) and Moldovans (56%) are also inclined towards agreement, whereas Belarusians seem equally split between

¹⁰ More details about country data are provided in Annex, Table A2.

agreement (45%) and disagreement (41%). Azerbaijanis are again the most unaware/undecided on the issue, with 32% of the population not providing a definite answer.

FIGURE 15 – ‘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 citizens who have heard of the EU)



EaP country citizens were also asked to assess the current benefits stemming from EU involvement. As in previous waves of the survey, tourism was considered as the area benefitting most from EU support and more so compared to last year (57%, up 12%). The strengthening of tourism was well perceived in all countries and particularly in Georgia (81%, up 11% since 2017). In Ukraine, also, a great increase in the share of citizens acknowledging the benefits in the tourist sector was recorded (53% up 16% since 2017). The appreciation of the access to more products and services (49%, up 7%) and improved trade (48%, up 9%) has also recorded an increase since 2017. Georgians, Moldovans and Armenians all deemed these aspects to be very important for their countries.¹¹

For the third year in a row, the EU’s contribution to fighting corruption was seen as the least effective: only 19% of the EaP citizens deemed it effective, although an increase of 7 percentage points was recorded compared to 2017. Ukrainians citizens were the least likely to see the EU’s benefits in this area (15%).

When EaP citizens were asked to identify areas where they would like greater EU support,¹² the majority of the population stated that the European Union should play a greater role in supporting economic development (52%), greater employment opportunities (37%) and in reducing corruption (36%). Support to the healthcare system (28%), education (22%) and agricultural production (19%) also appeared to be of particular concern.

It is noteworthy that the promotion of economic development is an important area of interest in Ukraine, (named by 60% of citizens), while the support to employment opportunities is particularly felt by Georgians (49% of citizens). 43% of people in Azerbaijan consider investing in better education to be one of the top priorities for their countries when it comes to future EU support, while 40% of Armenians and Georgians mentioned the quality of the healthcare system, and one third of Belarusians (33%) trade. The issue of reducing corruption seems to be quite pressing in Moldova and Ukraine, as it was mentioned by around 45% of citizens in both countries. Around one third of Moldovans (30%) would also favour more support from the EU to economic development (34%) and infrastructure (30%).¹³

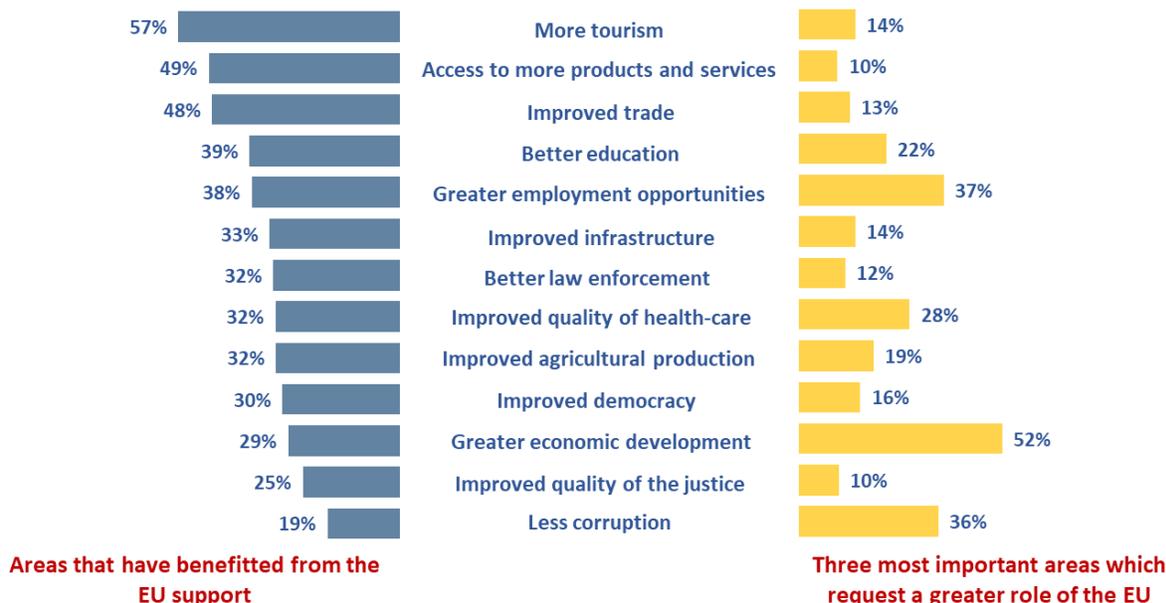
¹¹ More details about country data are provided in Annex, Table A3.

¹² Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.

¹³ More details about country data are provided in Annex, Table A4.

FIGURE 16 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas in which citizens request a greater role of the EU (Q2.9)

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

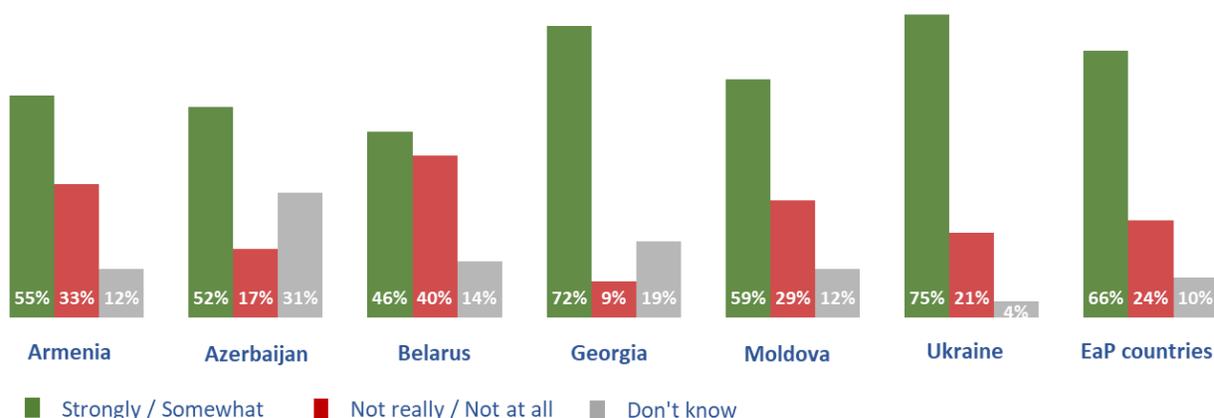


Nevertheless, when directly asked to evaluate the EU’s role in reducing corruption, most EaP citizens are confident that ‘the EU is committed to fighting corruption’(66%). One in four (24%) do not agree with this statement and one in ten (10%) do not have a definite opinion.

Ukrainians and Georgians are the most inclined towards agreement (75% and 72% of the population), whereas Belarusians seem fairly equally split between agreement (46%) and disagreement (40%). As for previous common beliefs, Azerbaijanis are the most unaware/undecided on the issue, with 31% of the population not providing a definite answer.

FIGURE 17 – ‘The EU is committed to fighting corruption’.
To what extent do you agree with this statement about the EU?

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

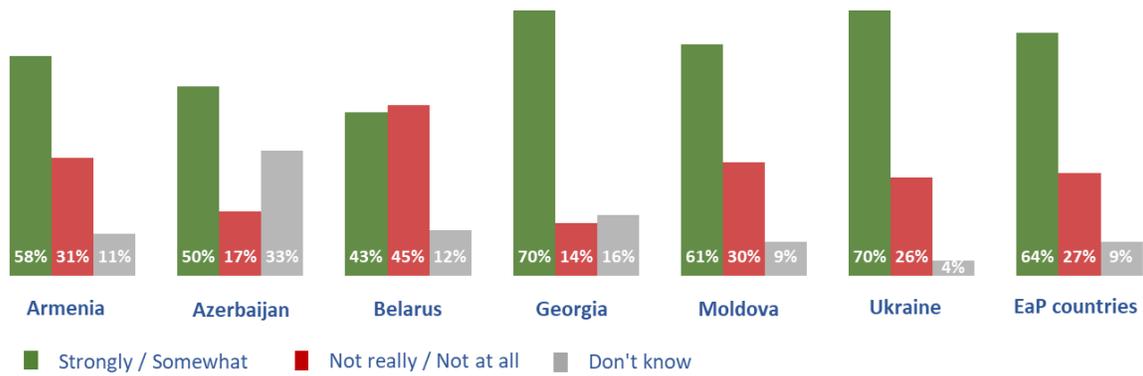


Most EaP citizens are also confident that ‘integration with the EU increases the country’s security and stability’ (64%) – with only one in four citizens (27%) not agreeing with the statement and less than one in ten (9%) not having a definite opinion. Considering that peace, security and stability is the top personal value

for EaP citizens, this is a very important finding because it outlines how stronger integration with the EU could provide a guarantee in this regard.

Ukrainians and Georgians are again those more disposed to agree with the statement – 70% of the population in both countries. Belarusians are again fairly equally split between agreement (43%) and disagreement (45%) and Azerbaijanis the most unaware/undecided, with 33% of the population not providing a definite answer. Nevertheless, in all countries except Belarus, most of the population views positively the prospect of closer integration with the EU, as it will bring with it more security and stability.

FIGURE 18 – ‘Integration with the EU increases the country’s security and stability’.
To what extent do you agree with this statement about the EU?
(Percentages refer to citizens who have heard of the EU)



3.3. Sources of information on the EU

Most EaP citizens have seen or heard information about the EU in the last three months (52%); nevertheless, a large decrease in passive exposure has been recorded since 2016 (down 18%). High levels of passive exposure were found in Moldova (75%), whereas only 36% of Armenians and 19% of Azerbaijanis were reached by EU-related information. However, the representation of the EU in national media is overall positive (55%). Television and ‘word of mouth’ continue to be the most popular sources of information (respectively only 8% and 15% of citizens never rely on them), although more citizens use new media compared to last year (Internet 64% and social media 57%). The vast majority of EaP citizens rely on their country’s media in the national language (85%) and/or in Russian (72%, of which 15% always); 43% rely on foreign media in Russian and 20% on media in other languages. Belarusians are the most likely to rely on media in Russian and more so compared to 2017 (up 10%). Media sources in Russian are also quite popular in Moldova, Ukraine and Armenia (58%, 50% and 46% of citizens respectively). Active exposure to EU-related information has slightly increased in the course of this past year (48%, up 7% since 2017) although it should be noted that around half of EaP citizens never look for/access information on the EU (52%). Nevertheless, over three quarters of all active users rate the quality of information they access positively.

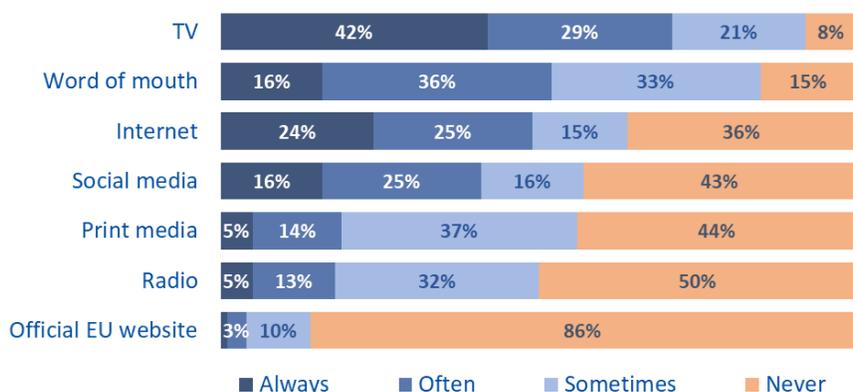
3.3.1. Media usage as sources of information

When asked about the types of media they use as sources of information, nearly all residents of the EaP countries indicated television (92%). In addition, compared to 2017, more citizens rely on it ‘always’ (42%, up 7%). The second most popular information source is ‘word of mouth’, generally used by 85% of population, albeit the majority of the population tend to rely on it often (36%) or sometimes (33%). New media, such as the Internet and social media, have recorded an increase compared to last year and are currently used by 64% (up 7%) and 57% (up 5%) of the population respectively – in particular, 24% of EaP citizens ‘always’ rely on the Internet. Print media and the radio are used as sources of information by 54% and 50% of EaP citizens respectively, although only 5% ‘always’ rely on them. As for the official EU website – 86% of residents of the EaP countries never use it, with no change compared to 2017.

At country level, Georgians and Azerbaijani are the most likely to use television (around 80% of citizens in both countries), whereas word of mouth as a source of information is more prevalent in Belarus (61%). The usage of new media is also particularly widespread in Belarus, together with Armenia and Moldova. One in four Moldovans and Belarusians also rely on the radio, and one in four Ukrainians and Belarusians on print press. It should also be noted that 10% of Moldovans and 7% of Armenians cited the official EU website – whereas in all other EaP countries the share of usage of this source of information is below 5%.¹⁴

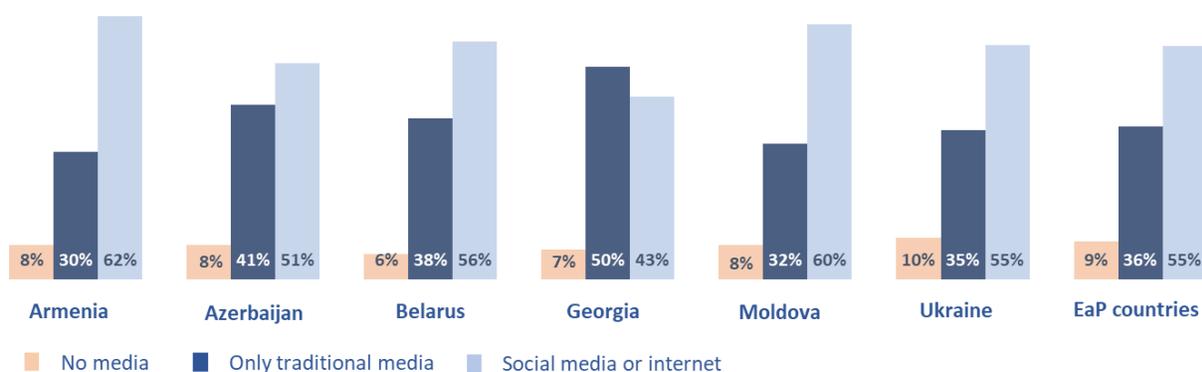
¹⁴ More details about country data are provided in Annex, Table A5.

FIGURE 19 – Type of media used as a source of information (Q3.7)



Compared to 2017, frequent usage of new media has surpassed frequent usage of traditional media only (55%, up 12%, versus 36%, down 6%) in all countries except Georgia, where users of traditional media sources are still prevalent (50%).¹⁵ The gap between new media and traditional media only is particularly wide in Armenia (62% versus 30%) and Moldova (60% versus 32%), consistent in Ukraine (55% versus 35%) and Belarus (56% versus 38%), whereas it is more contained in Azerbaijan (51% versus 41%). Overall, people who do not frequently use any of the above-mentioned media account for 9% of the population (down 6% compared to 2017), with no significant difference among countries.

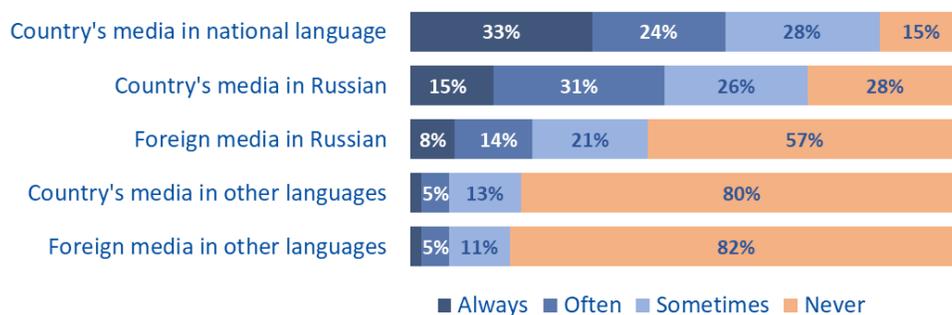
FIGURE 20 – Type of media frequently used as source of information



The vast majority of people in the EaP countries rely on their country’s media in the national language (‘always’ – 33%, ‘often’ – 24%, ‘sometimes’ – 28%), followed by the country’s media in Russian (‘always’ – 15%, ‘often’ – 31%, ‘sometimes’ – 26%). Foreign media in Russian are also used by 43% of EaP citizens, whereas media in other languages, be it the country’s media or foreign media, are never used by around 80% of EaP country residents – with less than 10% of citizens relying on them ‘always’ or ‘often’.

¹⁵ The first group includes all individuals who do not ‘always’ or ‘often’ use any of the surveyed media; the second group includes all individuals who ‘always’ or ‘often’ use only traditional media (such as television, radio and print media); while the last group includes all individuals that ‘always’ or ‘often’ use either the Internet (including the official EU website) or social media.

FIGURE 21 – Usage of media in national language, Russian and other languages (Q3.7)



In the figure below, the usage of media has been compared according to three main profiles of users: individuals who frequently use media in their national language; individuals who frequently use media in Russian; and individuals who use media in other foreign languages.¹⁶

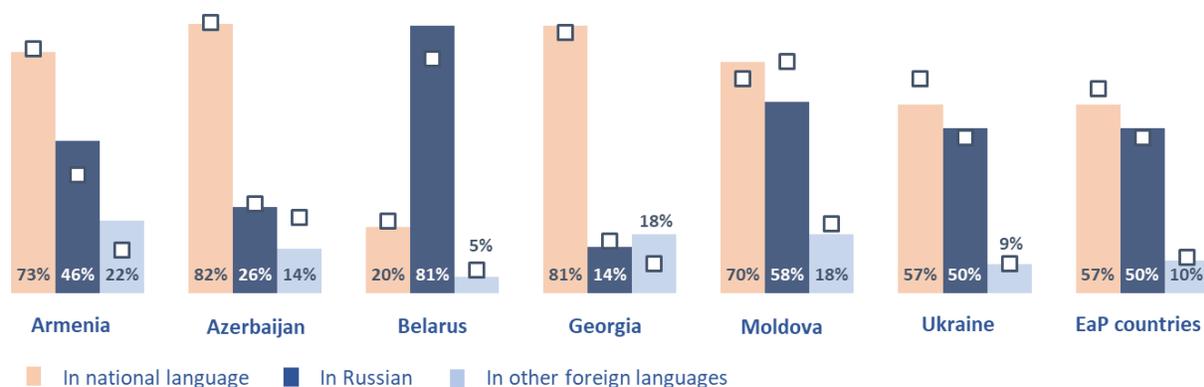
Overall, media in the national language is the most popular source of information (57%, down 5% since 2017). Frequent usage of media in Russian is also widespread (50% of EaP citizens), whereas one in ten citizens also rely on media in another foreign language.

The analysis of the sources of information according to language outlines important differences across the six EaP countries. In Belarus, where the majority of citizens use Russian in their daily lives and where the leading Russian broadcasters are received freely, 81% of citizens are frequent users of media in Russian (and more so compared to 2017 – up 10%). Media in the Russian language are also quite popular in Moldova and Armenia (58% and 46% of citizens respectively), where Russian TV channels are freely available, as in Belarus. Half of Ukrainians also rely on media in Russian; however, the diffusion of Russian media has been restricted following the 2014 conflict, and its popularity undermined, with the result that most citizens in fact rely on national media in the Russian language rather than Russian media. Azerbaijanis and Georgians are less frequent users of media in Russian (26% and 14% of citizens respectively), with over 80% of the population frequently relying on media in their national language.¹⁷ As for media in foreign languages other than Russian, they are most popular in Armenia (22%), Georgia (18%) and Moldova (18%), where around one in five citizens frequently rely on them.

¹⁶ The first group includes all individuals who ‘always’ or ‘often’ use media in national language; the second group includes all individuals who ‘always’ or ‘often’ use the country’s or foreign media in Russian; while the last group includes all individuals who ‘always’ or ‘often’ use the country’s or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

¹⁷ The role of Russian TV channels in Armenia, Belarus and Moldova is significant, as these are freely available through terrestrial transmitters and the so-called ‘hybrid channels’, or through different local broadcasters and cable television services. To various extents, these are among the most popular media resources and national broadcasters strive to provide an alternative and reduce their impact. On the contrary, in Azerbaijan and Georgia, Russian channels are only available through cable television, satellite, aerial or the Internet, therefore their role is more limited. In Ukraine, measures to restrict Russian channels were implemented after the armed conflicts in 2014: a number of Russian TV channels were banned from cable and their popularity has been undermined. See: Monitoring of Russian channels by MEMO 98, Final report, 2015. http://www.csdialogue.eu/sites/default/files/monitoring_report_executive_summary.pdf

FIGURE 22 – Frequent usage of media in national language, Russian and other languages



More than one in two residents of EaP countries trust their country’s media in the national language (55%), while the country’s media in Russian is trusted by 40% of EaP citizens. Around one in four EaP citizens trust foreign media in Russian (27%) and national media and foreign media in other foreign languages (22%).¹⁸

At country level, media in the national language is mostly trusted by Azerbaijanis (76%) and Georgians (69%), while Belarusians are more confident towards national media in Russian (62%). Around 40% of Armenians, Moldovans and Ukrainians also trust national media in Russian, whereas 49% of Belarusians and 38% of Moldovans trust Russian media. No significant difference was found with regard to trust in media in other foreign languages – whether national or foreign – with between one in five and one in four citizens oriented towards trusting them in all surveyed countries.

Like in 2017, word of mouth appears to be the most trusted source of information (61%) – particularly in Belarus (77%) and Ukraine (68%), whereas Azerbaijanis display the lowest level of trust towards this source of information (29%). Television is the second most trusted media channel (58%, up 5% since 2017) – with the highest levels of trust declared by Georgians (72%) – followed closely by the Internet (50%). Social media, print media and the radio attract a level of trust of around 40%, whereas the official EU website is trusted by 29% of EaP residents – and as many as 36% of Ukrainians.¹⁹

3.3.2. Sources of information about the EU

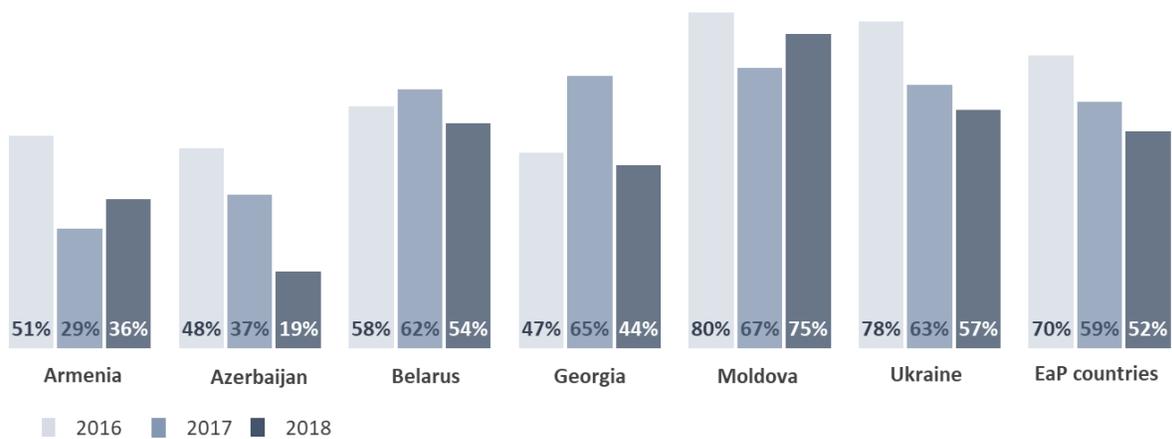
Around half of the EaP countries (52%) state they have seen or heard some information about the EU in the last three months. Passive exposure is particularly significant in Moldova (75%), followed by Ukraine (57%), Belarus (54%) and Georgia (44%), whereas only a third of citizens were reached by EU-related information in Armenia (36%) and less than a fifth in Azerbaijan (19%).

A decrease of 7 percentage points in passive exposure was also recorded since 2017, in line with the past trend (passive exposure was 70% in 2016). Azerbaijanis (down 18% since 2017) Georgians (down 21% since 2017) and to a much lesser extent Ukrainians (down 6%) and Belarusians (down 8%), all reported a decrease in passive exposure. On the contrary, 7% more Armenians and 8% more Moldovans stated that they had seen or heard some information about the EU in the three months preceding the survey.

¹⁸ More details about country data are provided in Annex, Table A6.

¹⁹ More details about country data are provided in Annex, Table A6.

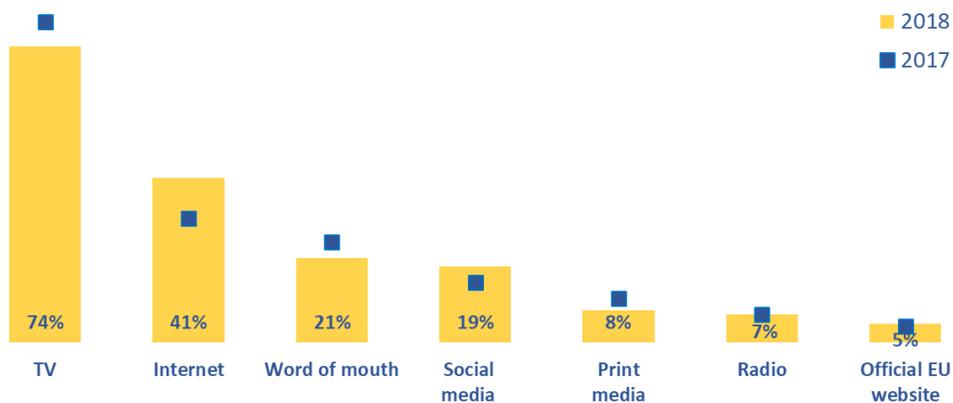
FIGURE 2 – Citizens who have seen or heard information about the EU in the last three months
(Percentages refer to citizens who have heard of the EU)



Most of the information recently obtained by the residents of EaP countries came from television (74%, down 6% since 2017). However, a great increase was recorded in passive exposure through the Internet, with 41% of EaP citizens citing it (up 10% since 2017). One in five citizens also heard information about the EU through word of mouth (21%) or social media (19%), while print media, radio and the official website were cited by between 5% and 8% of EaP citizens.

FIGURE 24 – 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 citizens who have heard any information about the EU in the last three months)



Television continues to be the main source of EU-related information in all countries and particularly in Georgia and Belarus (87% and 81% of the respective citizens cited TV). The Internet is a relevant source of passive exposure in Moldova (55%, up 11% since 2017). New media are also important in Ukraine, where 43% of citizens cited the Internet and 22% social media. In Moldova, 16% of citizens said that they had heard information about the EU through the radio – in all other countries passive exposure from the radio is below 10%. Less than 10% of citizens in all countries have heard or seen information through print media and the official EU website.

TABLE 6 – Source of information for those who have heard or seen information about the EU

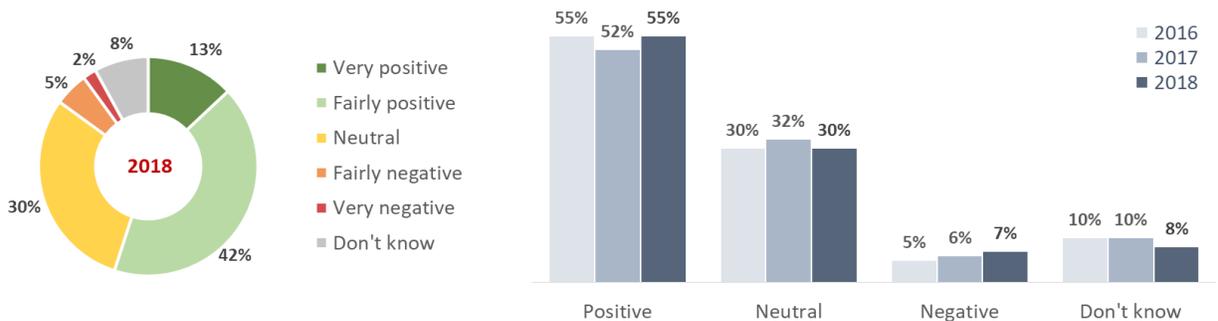
	Q3.2.1 Where or from whom have you seen or heard information about the EU in the last three months? (Multiple answers possible)						
	TV	Print media	Radio	Internet	Social media	Official EU website	Word of mouth
Armenia	60%	4%	6%	36%	17%	5%	16%
Azerbaijan	60%	1%	2%	38%	8%	1%	6%
Belarus	81%	8%	7%	32%	13%	1%	19%
Georgia	87%	5%	1%	20%	17%	2%	13%
Moldova	72%	7%	16%	55%	16%	5%	23%
Ukraine	74%	9%	6%	43%	22%	6%	21%
EaP Countries	74%	8%	7%	41%	19%	5%	21%

Percentages refer to citizens who have heard about the EU

When asked to evaluate the image of the EU in the national media, over half of EaP residents (55%) felt that their national media represented the European Union positively, with no substantial changes compared to last year. Around a third of the population believe the EU’s representation in the national media to be neutral (30%) and only 7% perceive it as negative. Less than one in ten citizens did not have an opinion regarding this issue (8%).

FIGURE 25 – In general, how would you say the EU was presented in the national media? (Q3.3)

(Percentages refer to citizens who have heard about the EU)



Positive evaluations were prevalent in all countries, except for Belarus – where the population is equally split between those who consider the EU representation in the national media to be positive (45%) and those who deem it neutral (44%) – and Azerbaijan, where positive assessments (40%) match neutral (29%) and negative (12%) assessments.

TABLE 7 – 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
Armenia	59%	21%	10%	10%	100%
Azerbaijan	40%	29%	12%	19%	100%
Belarus	45%	44%	5%	6%	100%
Georgia	60%	30%	3%	7%	100%
Moldova	56%	35%	5%	4%	100%
Ukraine	59%	27%	7%	7%	100%
EaP Countries	55%	30%	7%	8%	100%

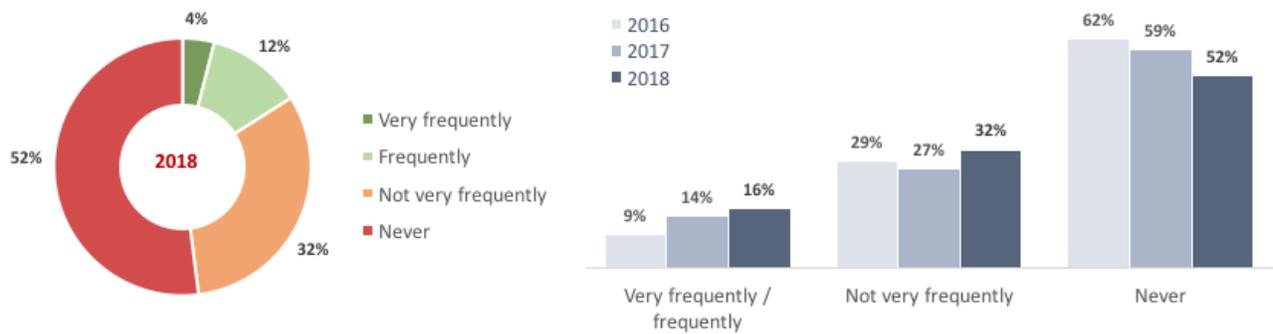
Percentages refer to citizens who have heard about the EU

According to 51% of residents of the EaP countries, the information they read, watch or access online ‘very much’ or ‘fairly’ helps them to have a better understanding of the European Union (up 5% since 2017). The other half of EaP citizens disagree with this notion, with 25% feeling that the information does not help them ‘very much’ to better understand the EU and 16% convinced that the information is ‘not at all’ useful. Like in 2017, Belarusians appear to be the least satisfied and 77% of citizens claim that the information they read, watch or access online does not help them to have a better understanding of the EU. On the contrary, around 60% of Armenians, Moldovans and Ukrainians are satisfied with the quality of the EU-related information they read, watch or access online.

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

Active exposure to EU-related information has increased in the course of this past year (48%, up 7% since 2017) although it should be noted that around half of EaP citizens never look for/access information on the EU (52%, down 7%). In addition, one third of active users look for/access information not very frequently (32%) and only 12% look for information frequently and 4% very frequently.

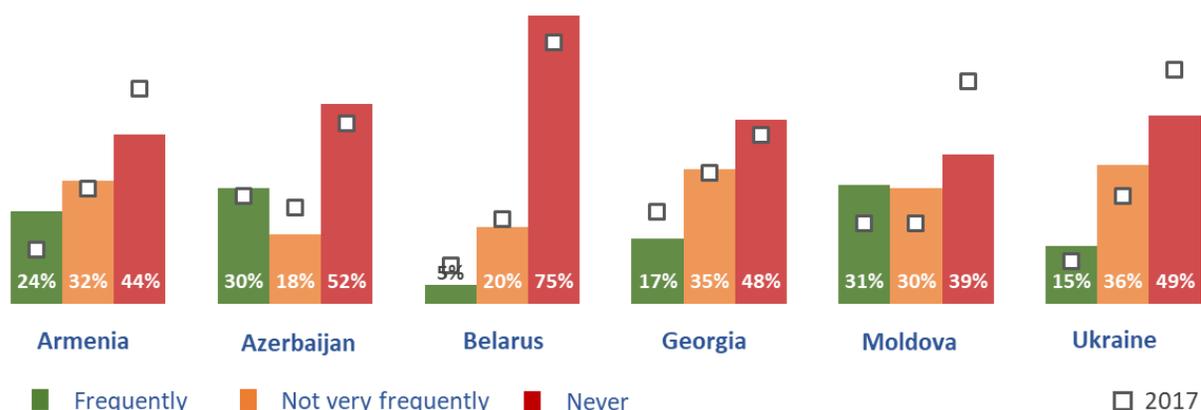
FIGURE 26 – How often do you look for/access information on the EU? (Q3.1) – Regional overview
(Percentages refer to citizens who have heard of the EU)



Compared to 2017, active exposure has remained quite stable in Azerbaijan, Belarus and Georgia, whereas it has increased in Armenia, Ukraine and particularly in Moldova. Moldovans are in fact the most likely to access information on the EU (61%, of which 31% frequently) and it should be noted that Moldova also has the highest figure of passive exposure (75%). Around half of Armenians, Azerbaijanis, Georgians and Ukrainians are also likely to engage in EU-related searches – whereas only a quarter of Belarusians frequently (5%) or not very frequently (20%) access/search for information on the EU.

FIGURE 27 – How often do you look for/access information on the EU? (Q3.1) – Regional overview

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

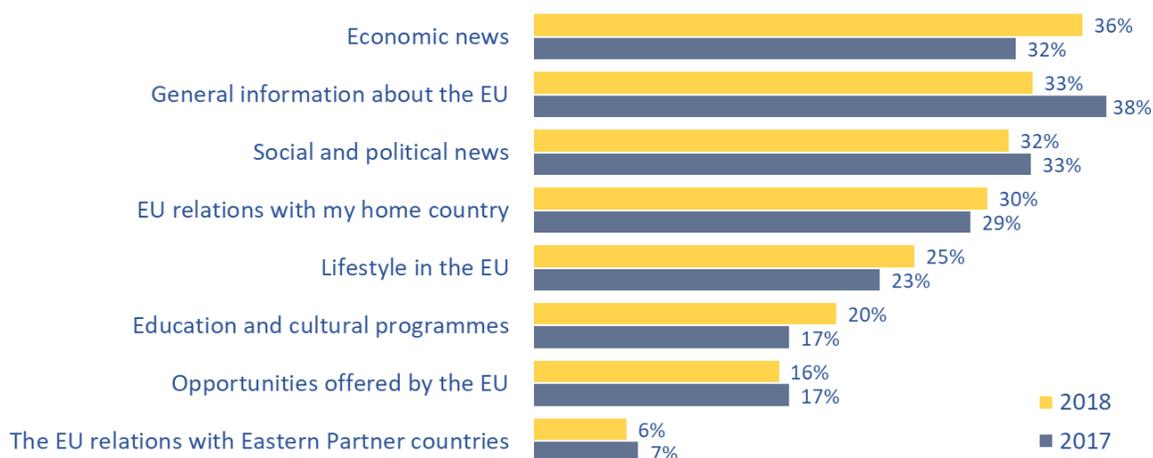


Every second person (50%) who searches for information about the EU accesses it in their national language, 47% does so in Russian and 3% in English. Accessing information about the EU in Russian is particularly common among Belarusians (97%). Sources in Russian are also preferred by Ukrainians (55% versus 43% in Ukrainian). On the contrary, nearly all Georgians (87%) and around three quarters of Azerbaijanis, Armenians and Moldovans access information in their national language.

Like in 2017, around a third of EaP citizens search for economic news (36%) general information (33%), social and political news (32%) and EU relations with their home country (30%). Between 16% and 25% also search for information about lifestyles in EU Member States (25%), educational and cultural programmes (20%) and opportunities offered by the EU (16%), while only 6% of EaP citizens are interested in the EU's relations with EaP countries in general.

FIGURE 28 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)

(Percentages refer to citizens who have looked for/accessed information on the EU)

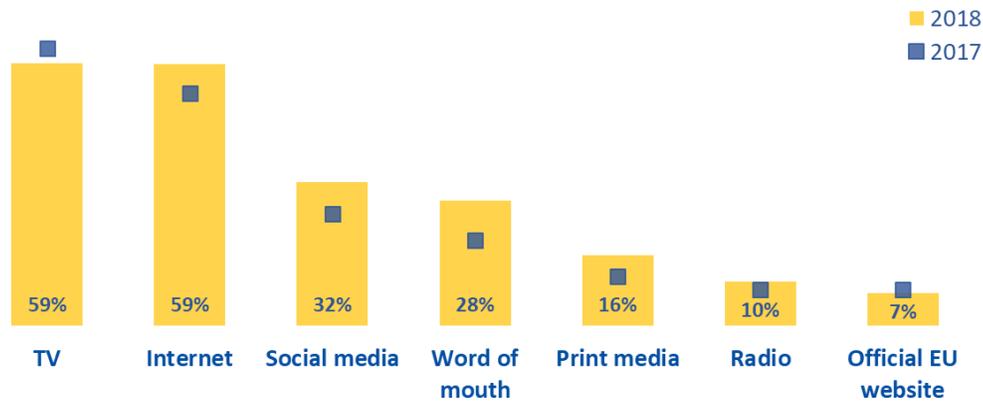


Television is the most important source of information for citizens actively seeking information about the EU, together with the Internet (59%). Compared to last year, however, active searches are more likely to happen through new media, such as the Internet (up 7% since 2017) and social media (32%, up 7%), whereas slightly less people rely on television to find information about the EU (down 3%). In addition, EaP citizens are slightly

more likely to rely on word of mouth (28%, up 9%) and print media (16%, up 5%), whereas the radio and the official EU website are stable at 10% and 7% respectively.

FIGURE 29 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)

(Percentages refer to citizens who have looked for/accessed information on the EU)



Moldovans (73%), Belarusians (66%) and Azerbaijanis (59%) mainly rely on the Internet, Georgians (70%) and Armenians (63%) on television, while Ukrainians are fairly equally split between the two sources (56% and 63% respectively). Over a third of Ukrainians also rely on social media (35%) and/or word of mouth (32%). Print media is still used by one in five Belarusians (19%) and Ukrainians (20%), who are also more likely to use the radio if searching for EU-related information. The usage of the official EU website is very low (between 6% and 9%) and quite similar in all EaP countries, except Azerbaijan and Georgia, where virtually no one relies on this source of information (1% and 3% of citizens respectively).

TABLE 8 – Source of information for those who look for information about the EU

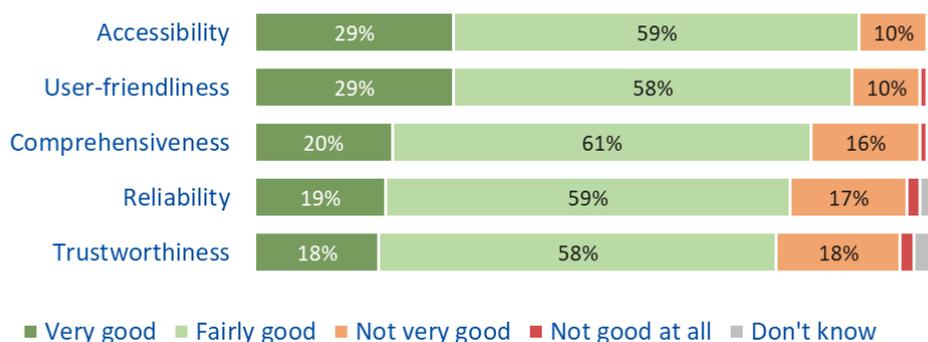
Q3.1.4 Where do you go to find information about the EU? <i>(Multiple answers possible)</i>							
	TV	Print media	Radio	Internet	Social media	Official EU website	Word of mouth
Armenia	63%	7%	4%	40%	30%	6%	16%
Azerbaijan	48%	2%	2%	59%	18%	1%	4%
Belarus	51%	19%	13%	66%	30%	8%	22%
Georgia	70%	4%	1%	43%	31%	3%	20%
Moldova	53%	9%	13%	73%	27%	9%	23%
Ukraine	63%	20%	12%	56%	35%	9%	32%
EaP Countries	59%	11%	8%	59%	32%	7%	28%

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

As in 2017, most active searchers rate the EU-related information they access as being accessible ('very' – 29%; 'fairly' – 59%) and user-friendly ('very' – 29%; 'fairly' – 58%). They also find the information 'comprehensive' (81%), 'reliable' (78%) and 'trustworthy' (76%). Compared to last year, their assessment appears to be slightly more positive for all the assessed indicators.

FIGURE 30 – How would you rate the information in terms of...? (Q3.1.5)

(Percentages refer to citizens who have looked for/accessed information on the EU)



It is worth noting that 15% of those who have heard about the EU have used EU informational websites²⁰ at least once. The Facebook profile of the European Union is the most visited EU website (12% of EaP citizens), followed by the institutional website (6%). All other EU pages have a share below 5%.

Moldovans and Armenians are the most active on EU informational websites, with as many as 26% and 17% of citizens respectively accessing the EU Facebook page and 12% and 10% the EU institutional websites.

TABLE 9 – Usage of EU websites

Q3.5 Have you ever used any of the following? <i>(Percentage of the population who answered yes)</i>							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Countries
EU institutional website	10%	4%	2%	4%	12%	6%	6%
EU Delegation website	3%	1%	1%	1%	4%	3%	3%
EU projects' websites	8%	2%	2%	4%	12%	5%	4%
EU NEIGHBOURS east website	4%	2%	1%	3%	6%	2%	2%
EU Twitter	6%	3%	1%	1%	9%	4%	4%
EU Facebook	17%	8%	1%	10%	26%	14%	12%

Percentages refer to citizens who have heard about the EU

²⁰ EU institutions' websites; EU Delegations' websites; EU projects' websites; 'EU NEUGHBOURS east' website; EU Twitter; EU Facebook.

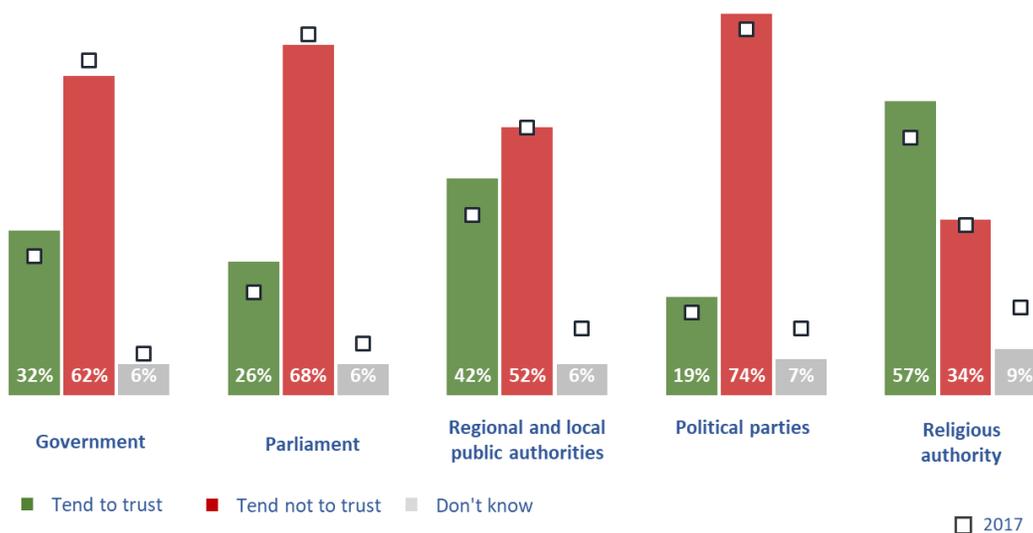
3.4. Views of residents of EaP countries on current situation and future expectations

Trust towards the different governmental institutions and political parties has slightly increased since 2017 – nevertheless, EaP citizens continue to share a low level of trust in their institutions, and the religious authority appears to be the only one towards which trust exceeds distrust (57% versus 34%). Regional and local public authorities are the most trusted government bodies (42% of EaP citizens), whereas trust in political parties is lowest (19%). Around one in four EaP citizens trust their country's parliament (26%) and one in three the government (32%). Accordingly, 65% of EaP citizens appear to be 'not very' or 'not at all' satisfied with the way democracy works in their country: satisfaction is highest among Azerbaijanis (48%) and Belarusians (42%), who are in fact the most confident citizens towards their own institutions. A slight improvement was assessed in the path towards democratic governance; however, the only element that most citizens feel applies in their country is gender equality (57%). Accordingly, 51% of citizens are openly pessimistic about the future of their country. Unemployment is the most pressing issue (44%), followed by low living standards and poverty (40%), low salaries and pensions (36%), the economic crisis (31%), corruption (29%), security issues and war (26%) and high prices and taxes (26%).

3.4.1. View of country's current situation

Trust levels towards the different governmental institutions and political parties have slightly increased since 2017 – nevertheless, citizens of the EaP countries continue to share a low level of trust in their institutions, and the religious authority appears to be the only one towards which trust exceeds distrust (57% versus 34%). Overall, regional and local public authorities are the most trusted government bodies, favoured by 42% of EaP citizens (up 7% since 2017), whereas trust in political parties is lowest – with only 19% of citizens trusting them and 74% not trusting them. Around one in four EaP citizens trust the parliament (26%) and one in three the government (32%).

FIGURE 31 – Please tell us your level of trust in the following institutions (Q4.1)



Among citizens of EaP countries, only Azerbaijanis display a high level of trust towards their institutions, with 85% of citizens trusting the government, 71% the parliament and 65% regional and local public authorities. Belarusians and Georgians are also comparatively more confident in their institutions, while Armenians, Moldovans and Ukrainians display lower levels of trust in their institutions than the overall EaP average. The level of trust in the government, parliament and political parties is particularly low in Ukraine, where only

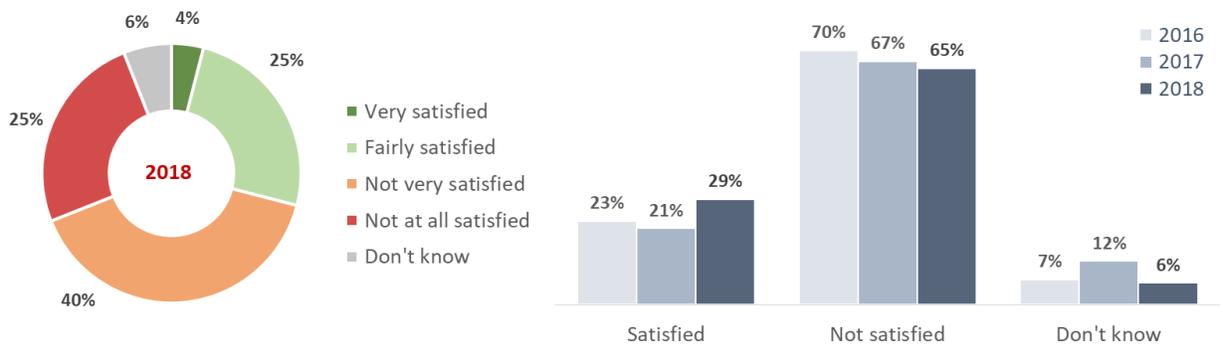
18%, 12% and 11% citizens are oriented towards trusting them. With the exception of Azerbaijan (where trust in the political parties stands at 45%), political parties are trusted by less than 30% of the population in all EaP countries and they are in fact the least trusted institutions among all.

TABLE 10 – Trust in national institutions by country

Q4.1. Please tell us your level of trust for the following institutions (Percentage of the population who answered "Tend to trust")							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Government	28%	85%	58%	42%	24%	18%	32%
Parliament	19%	71%	48%	36%	13%	12%	26%
Regional and local public authorities	29%	65%	42%	47%	35%	38%	42%
Political parties	18%	45%	29%	20%	15%	11%	19%
Religious authority	34%	57%	51%	75%	70%	58%	57%

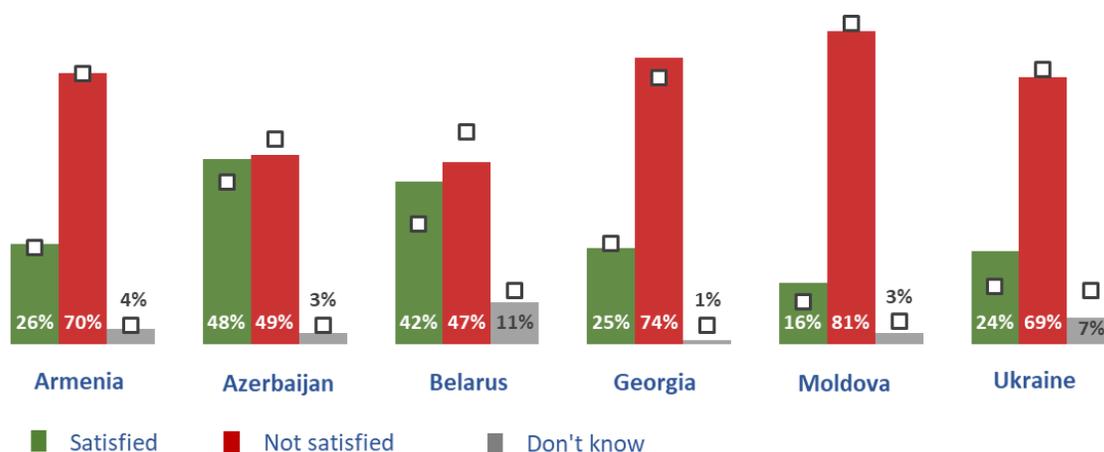
When it comes to the evaluation of the current situation in terms of democracy, 65% of EaP citizens appear to be 'not very' or 'not at all' satisfied with the way democracy works in their country, with no significant change compared to 2017. However, an increase in positive assessment was recorded (29%, up 8%), which is linked to a corresponding decrease in the share of undecided/unsure citizens (6%, down 6%).

FIGURE 32 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in your country? (Q4.3) – Regional overview



The level of satisfaction with the functioning of democracy in the country is highest among Azerbaijanis (48%, up 6%) and Belarusians (42%, up 11%), who are in fact the most confident citizens towards their own institutions. On the contrary, Moldovans are the most dissatisfied (81%), with around 70% of Ukrainians (69%), Georgians (74%) and Armenians (70%) sharing their negative opinion.

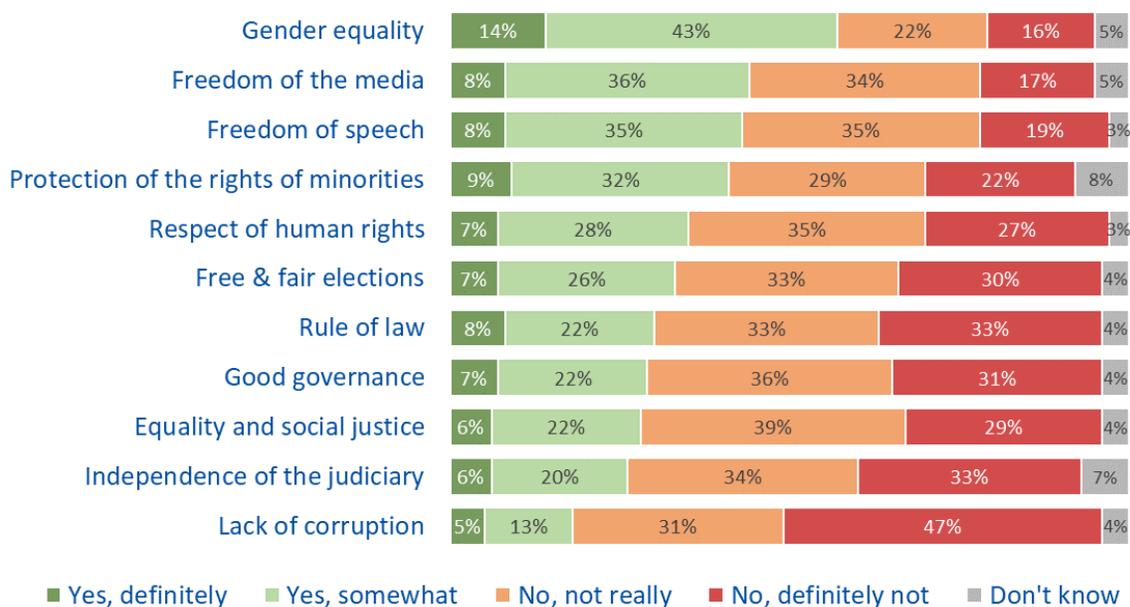
FIGURE 33 – On the whole, are you ‘very satisfied’, ‘fairly satisfied’, ‘not very satisfied’ or ‘not at all satisfied’ with the way democracy works in your country? (Q4.3) – Country specific picture



A slight improvement has been seen in the path towards democratic governance, while the hierarchy of elements that EaP citizens believe apply to their country is largely consistent with last year’s findings. In fact, the only element that most citizens feel applies to their country is gender equality (57%, up 3% since 2017). Over 40% also believe that freedom of media (44%, up 3%) freedom of speech (43%, up 2%) and protection of the rights of minorities (41%, up 5%) exist in their country.

Free and fair elections, rule of law, good governance, equality and social justice and independence of the judiciary were regarded as more problematic (around 65% of EaP citizens stated that they do ‘not really’ or ‘not definitely’ apply to their country), with lack of corruption seen as the most problematic issue – 47% of EaP citizens say it ‘definitely does not apply’ to their country and for 31% it ‘does not really apply’.

FIGURE 34 – To what extent do you think that the following elements apply in your country? (Q4.4)



Azerbaijanis, Belarusians and Georgians provide on average a more positive assessment about the prevalence of most democratic indicators in their country than Armenians, Moldovans and particularly

Ukrainians, among whom less than a third are convinced that most elements apply to their country. Corruption is in fact the most problematic issue in all countries – except for in Armenia, where less citizens acknowledge the existence of free and fair elections (20% versus 27% for lack of corruption) – and particularly in Ukraine and Moldova (only 7 and 16% of citizens respectively believe that lack of corruption applies to their country).

TABLE 12 – Elements that apply to the country

Q4.4. To what extent do you think that the following elements apply in your country? (Percentage of the population who answered “Yes, definitely” or “Yes, somewhat”)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Freedom of speech	57%	59%	53%	65%	47%	34%	43%
Free & fair elections	20%	61%	54%	43%	32%	22%	33%
Gender equality	44%	62%	75%	55%	64%	53%	57%
Protection of the rights of minorities	49%	70%	53%	56%	49%	30%	41%
Independence of the judiciary	31%	59%	54%	38%	24%	13%	26%
Freedom of the media	59%	60%	55%	59%	43%	35%	44%
Respect of human rights	41%	62%	60%	45%	37%	22%	35%
Rule of law	35%	65%	66%	42%	26%	13%	30%
Good governance	29%	65%	56%	37%	24%	15%	29%
Lack of corruption	27%	42%	38%	36%	16%	7%	18%
Equality and social justice	28%	56%	48%	44%	28%	17%	28%

3.4.2. Future expectations

In line with the trend recorded at country level, citizens of the EaP countries seem to be slightly more optimistic about their own futures (56%) than the future of their country (46%). EaP citizens also seem slightly more optimistic about their personal prospects, in line with the trend recorded since 2016, while no significant change was recorded with regard to attitudes towards their country.

FIGURE 35 – How optimistic are you about the future of your country? (Q4.5) – Regional overview

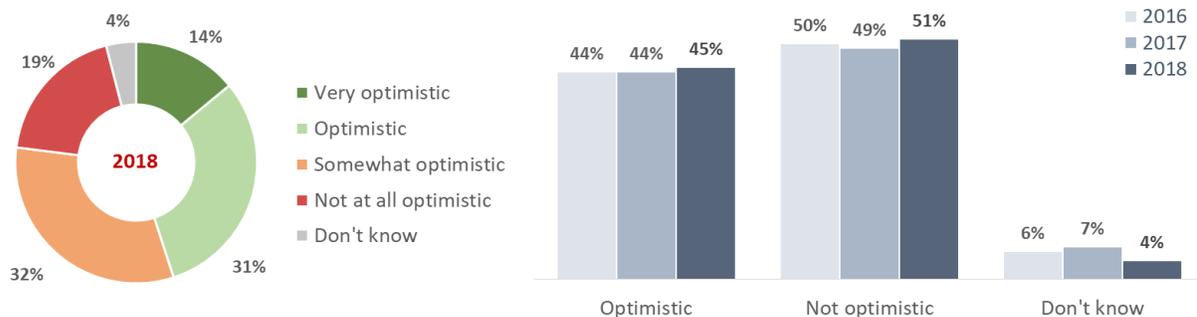
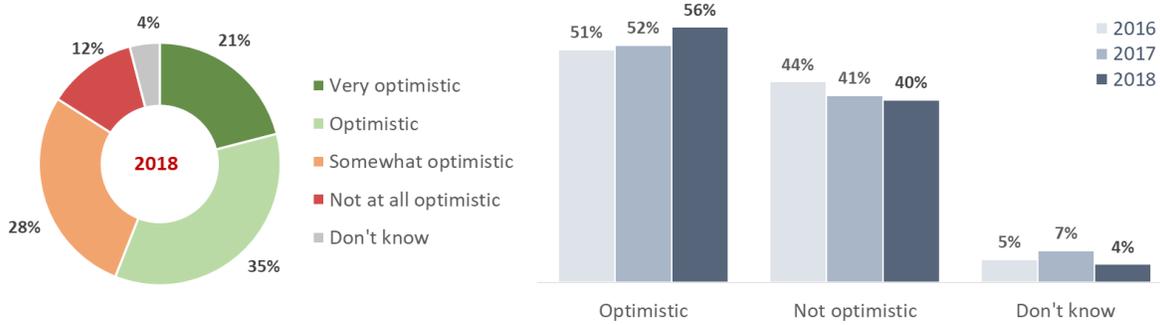
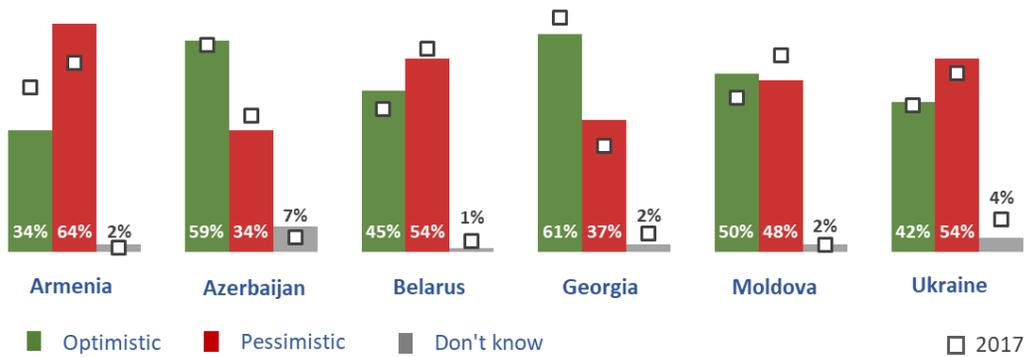


FIGURE 36 – How optimistic are you about your personal future? (Q4.6) – Regional overview



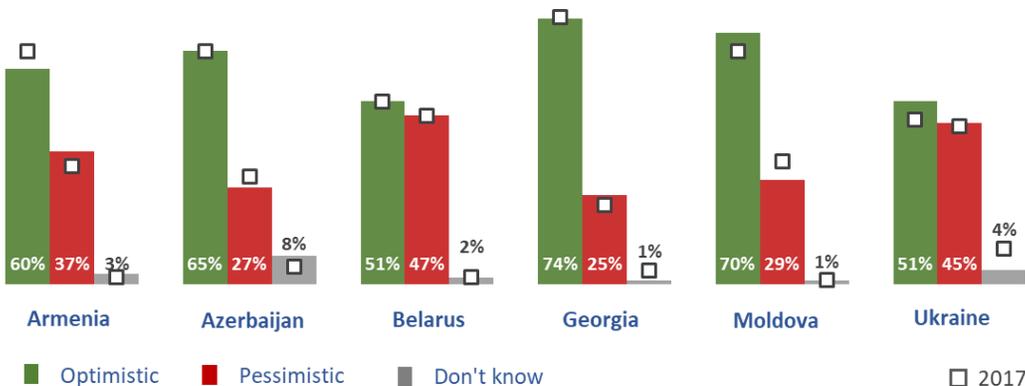
Georgians and Azerbaijanis appear to be the most optimistic about their country’s future (61% and 59% respectively), as opposed to Moldovans (50%), Belarusians (45%), Ukrainians (42%) and particularly Armenians, where only 34% of citizens feel optimistic in this regard. Armenians have in fact recorded the greatest increase in their level of pessimism since 2016 (up 14 percentage points).

FIGURE 37 – How optimistic are you about the future of your country? (Q4.5) – Country specific picture



As for personal expectations, Georgians express the highest level of optimism (74%), followed closely by Moldovans (70%). Like in 2017, Ukrainians and Belarusians (51% for both countries) are those less positively disposed towards their personal futures.

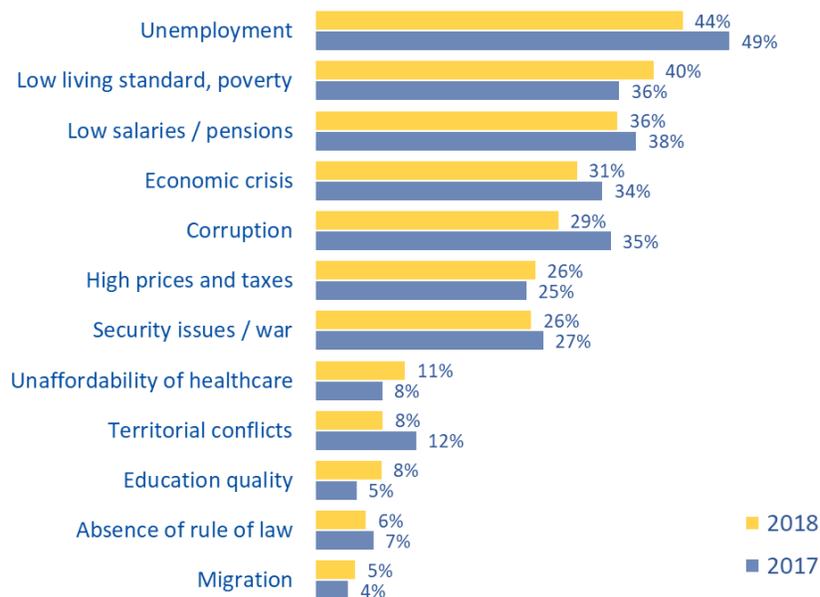
FIGURE 38 – How optimistic are you about your personal future? (Q4.6) – Country specific picture



Unemployment appears to be the most pressing problem for 44% of the inhabitants of EaP countries, followed by low living standards (40%) and poverty and low salaries and pensions (36%). Around one third of EaP citizens are also worried about the economic crisis (31%), whereas less citizens are worried about corruption compared to in 2017 (29%, down 6%). One in four EaP citizens also named security issues and war and high prices and taxes (26% for both) and one in ten (11%) the unaffordability of healthcare.

Unemployment is the greatest concern in Georgia and Azerbaijan (81% and 72% respectively), and also in Belarus and Armenia, albeit with lower percentages (55% and 50% respectively). Corruption (48%) and low salaries and pensions (49%) represent the most pressing issues in Moldova, whereas in Ukraine 45% of citizens mentioned low living standards and poverty. It should also be noted that 24% and 30% of citizens of Armenia and Moldova respectively included migration among the most pressing problems facing their own country.²¹

FIGURE 39 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)



²¹ More details about country data are provided in Annex, Table A7.

3.5. Profiling attitudes towards the EU: positive versus neutral

EaP citizens with a positive view of the EU account for nearly half of the population (46%). Compared to citizens with a neutral view of the EU (37% of the EaP population), they tend to be slightly more concentrated among men (49%, versus 43%), the younger age groups (40% are between 15 and 34, versus 34%) and the most educated (40% have a high level of education, versus 28%). They are also more likely to be native speakers of their national language (77% versus 69%), whereas neutral individuals are more likely to be native Russian speakers (29% versus 22%). EU supporters are more likely to be actively and passively exposed to information about the EU, be frequent users of new media – (63% versus 49%) and less frequent users of traditional media only (30% versus 40%) or no media (7% versus 11%). EU supporters are also less frequent users of Russian media (45% versus 50% of neutral citizens) and keener users of media in their national languages (60% versus 56%) or other foreign languages (13% versus 7%).

They share a higher level of confidence in all foreign institutions – in fact, for neutral individuals, trust prevails over distrust only for the EU – and a much stronger and more positive vision of the Union than neutrally oriented citizens. Accordingly, their vision for their personal future and particularly the future of their country is definitely more optimistic.

In this section, the attitude of EaP citizens towards the EU has been analysed according to two main profiles: individuals who have a positive image of the EU and those who are neutral towards it.²²

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 their country 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 the country's and respondents' personal future and main concerns.

3.5.1. Positive attitudes

EaP citizens with a positive view of the EU account for nearly half of all EaP citizens (46%). Compared to the EaP overall, they tend to be slightly more concentrated among men (49% versus 46%), the younger age groups (40% are aged between 15 and 34 years versus 35% among EaP citizens overall) and among the most educated (40% have a high level of education, versus 34%). They are definitely more likely to be native speakers of their national language (77% versus 72%) than the overall EaP population. No significant peculiarity was assessed in terms of employment status and settlement size.

²² 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 40 – Socio-demographic characteristics and country of EaP country residents with a positive image of the EU

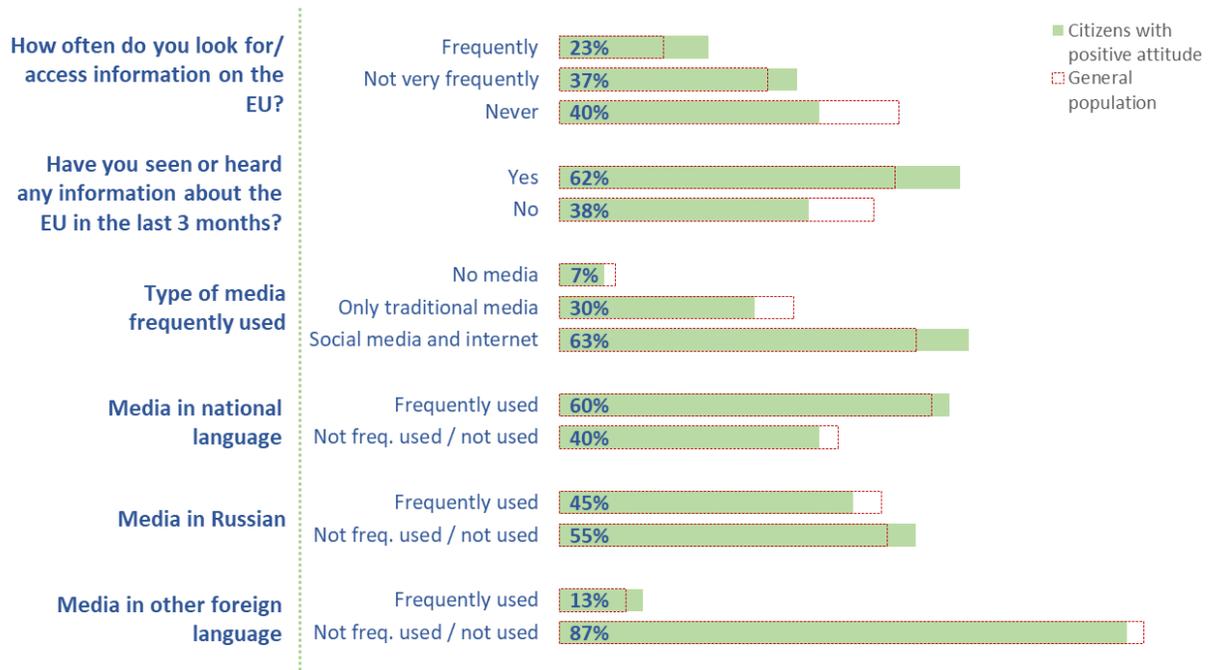


EaP citizens with a positive view are more likely to be actively and passively exposed to information about the EU than the EaP citizens in general. In fact, 62% had seen or heard information about the EU in the three months preceding the survey (versus 52% for the overall EaP population) and 60% look for/access information on the EU ‘frequently’ (23%) or ‘not very frequently’ (37%) – the corresponding figures of active exposure in the general EaP population stand at 16% and 32% respectively.

If searching for EU-related information, EU supporters are slightly less likely to do so in Russian (44%) than the general EaP population (47%). Nevertheless, they mainly share the same interests, with a third searching for general information on the EU (34%) and economic news (34%) and around 30% for EU relations with their home country, social and political news (29%) and lifestyle in the EU (27%). In fact, EU supporters seem slightly more interested only in education and cultural programmes (23% versus 18%) and opportunities offered by the EU (15% versus 13%).

EU supporters are keener users of new media – 63% frequently use the Internet and social media (compared to 55% of the general EaP population) – and less likely to rely on traditional media only (30% versus 36%). EaP citizens with a positive attitude towards the EU are less frequent users of Russian media (45% versus 50% of the overall population) and slightly keener users of media in their national language (60% versus 57%) or other foreign languages (13% versus 10%).

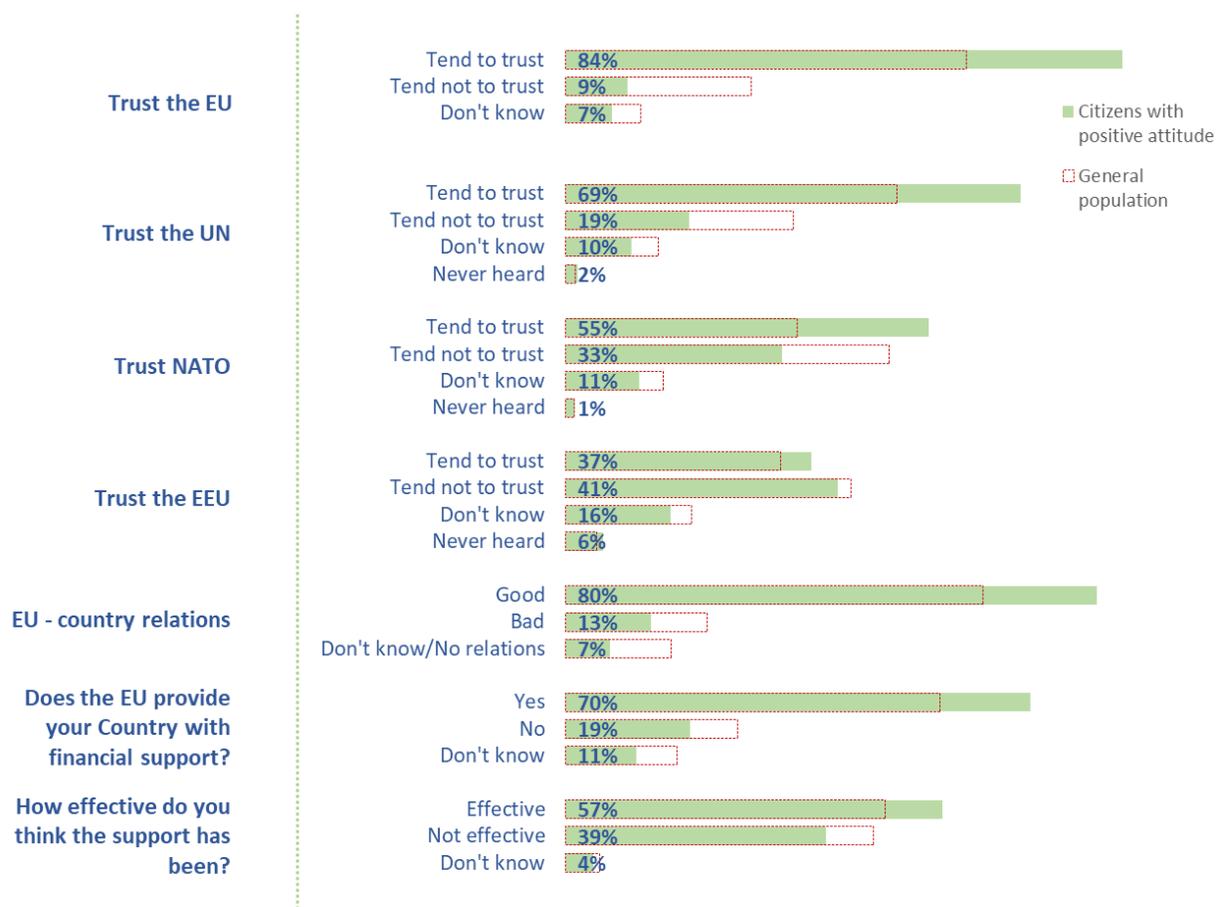
FIGURE 41 – Exposure to information about the EU and media usage among EaP country residents with a positive image of the EU



A positive image of the EU is linked to a higher level of confidence in the EU and in all foreign institutions. Nevertheless, it should be noted that while the difference between the levels of trust is very wide (around 20 percentage points) for the EU, the UN and NATO, when it comes to the EEU, opinions of EU supporters and of the overall EaP population tend to converge. More specifically, 84% of EU supporters trust the EU (versus 61% in the overall population), 69% trust the UN (50% in the overall population), 55% trust NATO (35% in the overall population) but only 37% of EU supporters trust the EEU (versus 33% in the overall population).

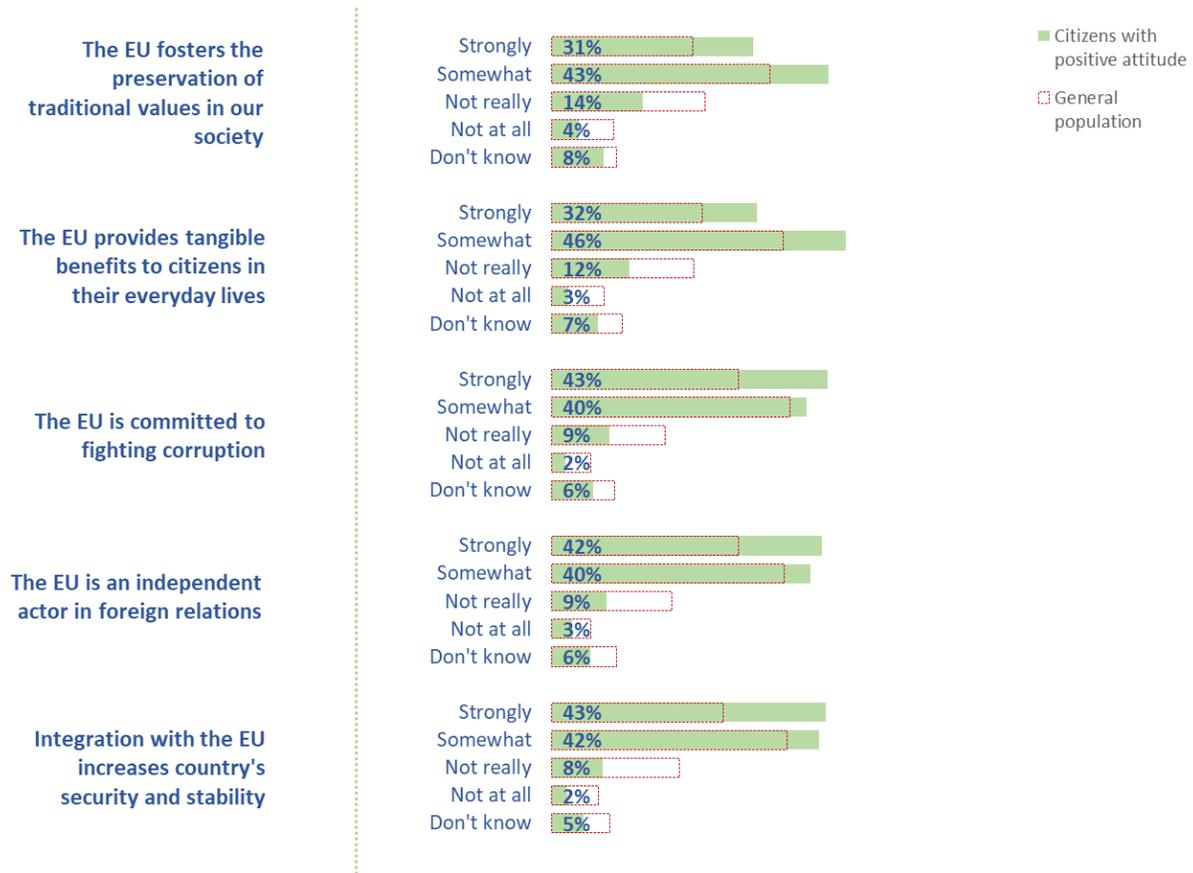
In addition, 80% of all positively oriented EaP citizens hold a good image of the relations between their country and the EU (versus 63% in the overall population), 70% acknowledge the EU’s financial support (versus 57% in the overall population) and 57% rate it as effective (versus 48% in the overall population).

FIGURE 42 – Attitudes towards the EU among EaP country residents with a positive image of the EU



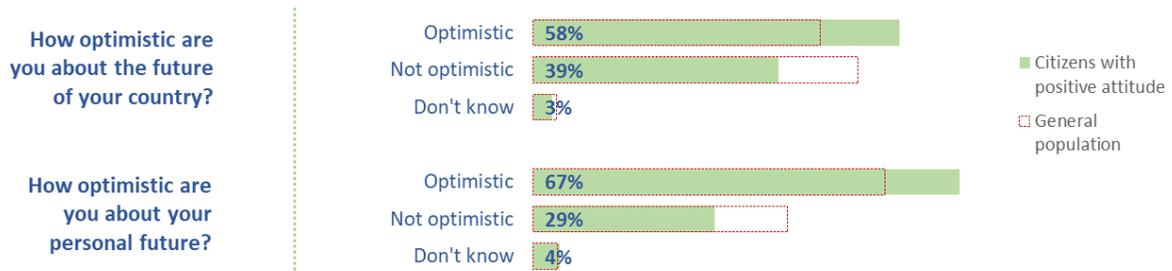
When it comes to the assessment of common beliefs, EU supporters tend to share a much stronger and more positive vision of the EU than the general EaP population. In fact, over 80% of individuals with a positive image of the EU ‘strongly’ or ‘somewhat’ agree that ‘integration with the EU increases the country's security and stability’, ‘the EU is an independent actor in foreign relations’ and ‘the EU is committed to fighting corruption. Around three quarters of EaP citizens with a positive attitude towards the EU are also convinced that ‘the EU fosters the preservation of traditional values in our society’ (74%) and that ‘the EU provides tangible benefits to citizens in their everyday lives’ (78%).

FIGURE 43 – Common beliefs of EaP country residents with a positive image of the EU



A more optimistic attitude, both at a personal level and regarding the country’s future, is clearly linked with a positive image of the EU. In fact, 58% of EU supporters feel positive about the future of their country and 67% about their own prospects (it is 45% and 56% respectively for the overall population). Nevertheless, 41% are worried about unemployment (their most pressing concern), 37% about low living standards and poverty and 34% about the economic crisis, low salaries and pensions – similar to the overall EaP population. Compared to the general population, EU supporters seem more concerned about corruption (34%), security issues/war (29%) and territorial conflicts (10%) – the figures are 29%, 26% and 8% respectively for the general EaP population.

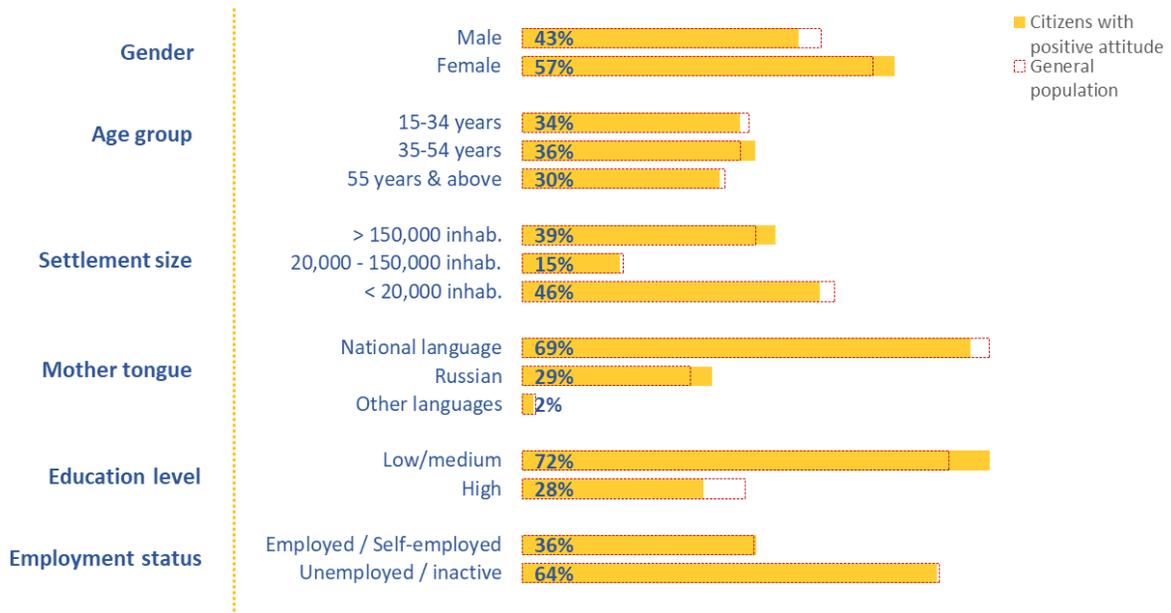
FIGURE 44 – View of the future among EaP country residents with a positive image of the EU



3.5.2. Neutral attitudes

EaP citizens with a neutral view of the EU account for slightly over one third of the population (37%). Compared to EU supporters, EaP citizens with a neutral view of the EU are more concentrated among women (57%), those in the middle and oldest age brackets (66% are over 35) and citizens with a low-to-medium level of education (72%). EaP citizens holding a neutral stance are also slightly more likely to live in larger settlements (39%) and to be native Russian speakers (29%). As for nationality, they are considerably more likely to be found among Belarusians (17%).

FIGURE 45 – Socio-economic characteristics and country of EaP country residents with a neutral image of the EU

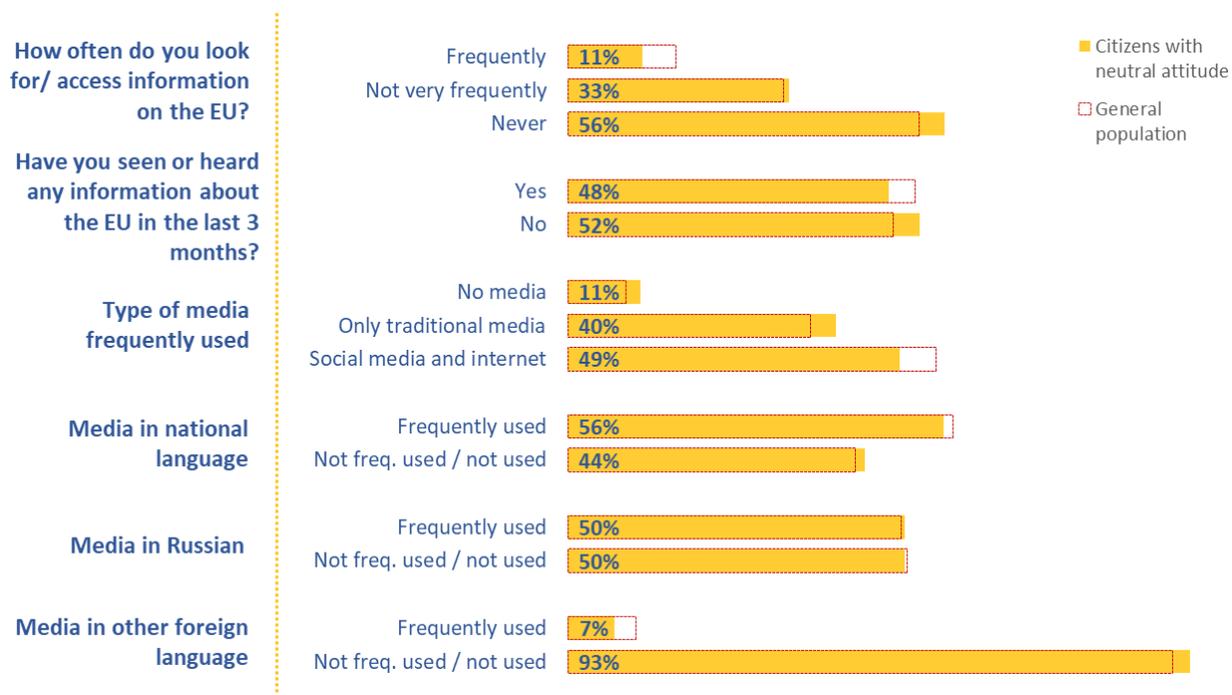


Neutrality has clear characteristics when it comes to the passive and active exposure to EU-related information. Less than half of EaP citizens holding a neutral stance had heard information about the EU in the three months preceding the survey (48%) or accessed/searched for EU-related information (44%) – these percentages are 62% and 60% respectively among EU supporters.

If searching for EU-related information, those neutral about the EU are slightly more likely to do so in Russian (49%) and less likely to do so in English (2%) than EU supporters (44% and 4% respectively). Compared to EU supporters, they are also more likely to search for social, political and economic news (38% and 39% respectively versus 29% and 34% respectively) and less likely to be interested in educational and cultural programmes (11% versus 23%). Nevertheless, around 30% search for general information about the EU and its relationship with their own country – in line with the figures for the general EaP population.

As for the usage of media, EaP citizens holding a neutral stance are less keen users of new media – 49% frequently use the Internet and social media (compared to 63% of EU supporters) – and more likely to rely on traditional media only (40% versus 30%) or no media (11% versus 7%). EaP citizens with a neutral attitude towards the EU are also more frequent users of Russian media (50% versus 45% of EU supporters) and less keen users of media in their national languages (56% versus 60%) or other foreign languages (7% versus 13%).

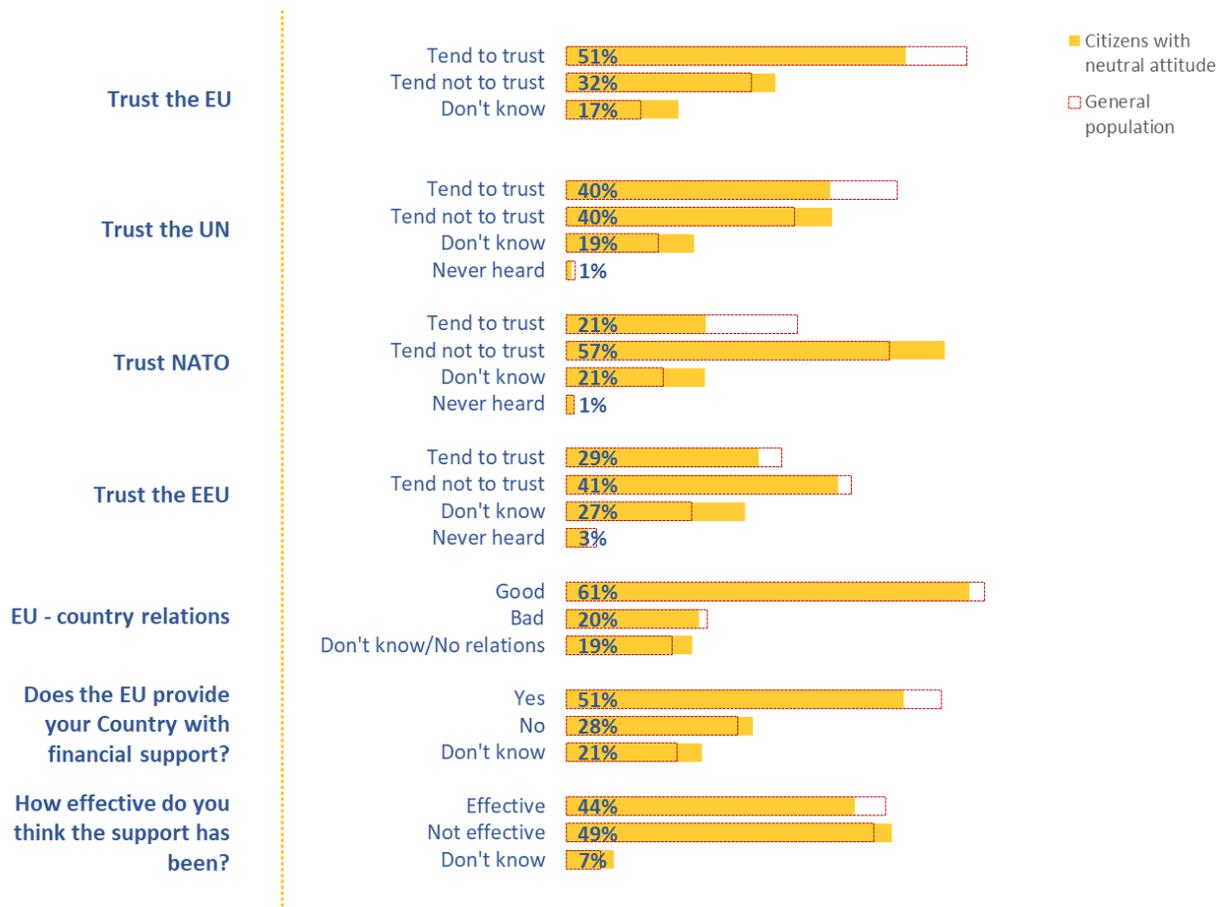
FIGURE 46 – Exposure to information about the EU and media usage among EaP country residents with a neutral image of the EU



Neutrality is linked with lower levels of trust in all foreign institutions – in fact, trust prevails over distrust only for the European Union and 51% of neutral EaP citizens trust the EU (versus 84% of EU supporters). 40% of neutrally oriented EaP citizens trust the UN (versus 69% in the overall population), with an equal level of distrust; 21% trust NATO (versus 55%), with a 57% level of distrust; and 29% trust the EEU (versus 37%), with 41% of neutral EaP citizens oriented towards distrust.

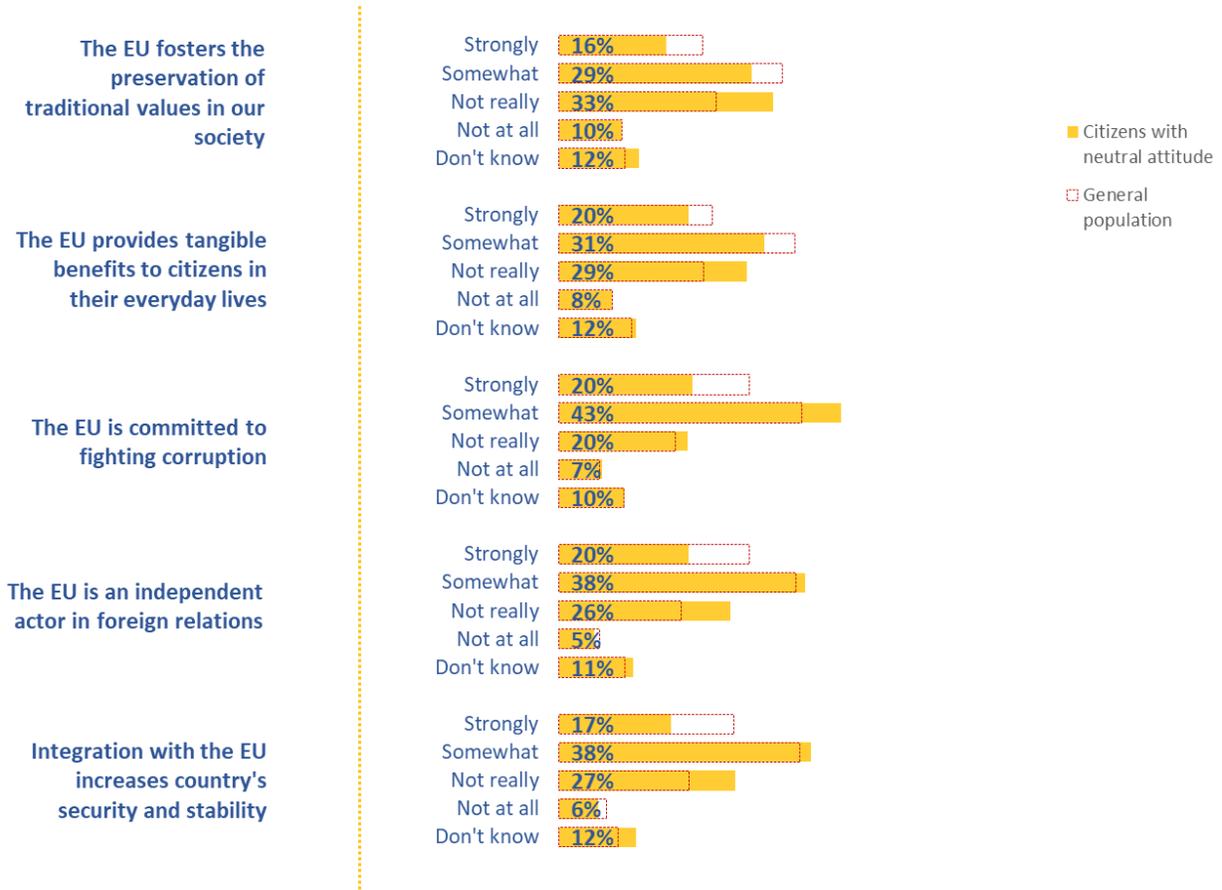
The assessment of the relations between EaP countries and the EU and the acknowledgement of the EU’s financial support is again less positive: 61% of neutral citizens would describe the relations between their country and the EU as ‘good’, 51% acknowledge the EU’s financial support and 44% consider it as effective (versus 80%, 70% and 57% respectively for EU supporters).

FIGURE 47 – Attitudes towards the EU among EaP country residents with a neutral image of the EU



When it comes to the assessment of common beliefs, individuals holding a neutral image of the EU are again less positive than both EU supporters and the general EaP population – in fact, the level of agreement for all statements does not exceed 63% (84% for EU supporters). The highest share of approval was recorded for the statement that ‘the EU is committed in fighting corruption’ (63%), with the two statements ‘integration with the EU increases the country's security and stability’ (57%) and ‘the EU is an independent actor in foreign relations’ coming very close (56%).

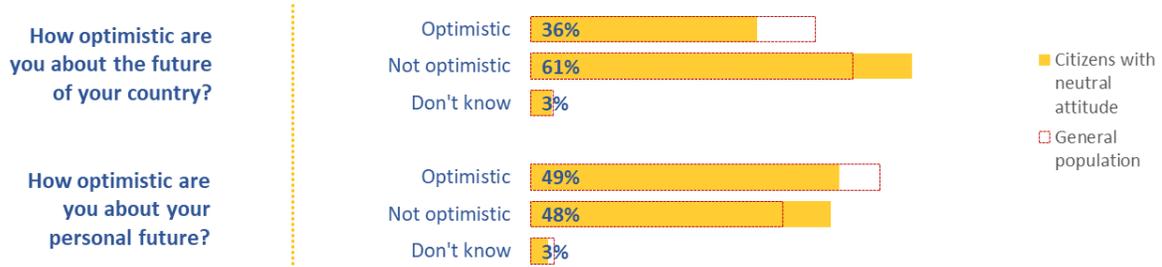
FIGURE 48 – Common beliefs of EaP country residents with a neutral image of the EU



Neutral individuals are also less optimistic than EU supporters and the overall EaP population, with 61% openly pessimistic about their country's future and 48% about their personal futures.

Compared to EU supporters, individuals with a neutral stance seem more concerned about unemployment (46%, their greatest concern), low living standards and poverty (40%), low salaries and pensions (38%), high prices and taxes (30%) and the unaffordability of healthcare (12%). These issues, which seem to have a more immediate effect on the everyday lives of individuals, may well reflect real difficulties they are encountering in their daily lives, thus accounting for both their greater pessimism and their more indifferent view towards the EU. Finally, neutral individuals seem slightly less worried about corruption (26%) and security issues/war (25%) and territorial conflicts (7%) than EU supporters.

FIGURE 49 – View of the future among EaP country residents with a neutral image of the EU



4. Annex

TABLE A1 – Knowledge of specific programmes by country

Q2.6.1. Which specific programme(s) do you know? (Multiple answers possible)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Education programmes	36%	45%	44%	42%	39%	43%	42%
Cultural programmes	19%	33%	28%	28%	19%	16%	19%
Energy efficiency programme and global warming programme	7%	6%	16%	2%	9%	20%	17%
Infrastructure development projects	17%	8%	24%	21%	61%	24%	26%
Economic reforms/business promotion	20%	14%	34%	26%	18%	31%	29%
Justice reforms/police reforms	6%	2%	3%	8%	15%	28%	21%
Health and medicine programmes	28%	13%	33%	49%	39%	34%	35%
Agricultural and rural development programmes	31%	17%	12%	34%	31%	11%	15%

Percentages refer to EaP country residents who were aware of the EU's financial support

TABLE A2 – EU financial support compared to that of other institutions by country

Q2.7. As far as you know, for each of the following international institutions or foreign countries, would you say that it provides more, the same, or less financial support to your country than the European Union?								
		Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
United States	More	23%	8%	4%	36%	8%	23%	19%
	The same	23%	12%	33%	29%	29%	43%	36%
	Less	35%	29%	38%	12%	35%	21%	25%
	Don't know	19%	51%	25%	23%	28%	13%	20%
	Total	100%	100%	100%	100%	100%	100%	100%
United Nations or one of its agencies	More	19%	9%	11%	19%	4%	12%	12%
	The same	28%	15%	40%	31%	26%	46%	39%
	Less	23%	25%	22%	15%	31%	26%	25%
	Don't know	30%	51%	27%	35%	39%	16%	24%
	Total	100%	100%	100%	100%	100%	100%	100%
Russian Federation	More	49%	12%	61%	3%	16%	3%	15%
	The same	18%	15%	22%	5%	18%	13%	14%
	Less	20%	25%	7%	46%	50%	61%	47%
	Don't know	13%	48%	10%	46%	16%	23%	24%
	Total	100%	100%	100%	100%	100%	100%	100%
International Monetary Fund / World Bank	More	30%	13%	17%	28%	10%	44%	33%
	The same	24%	16%	46%	25%	33%	35%	33%
	Less	18%	21%	13%	10%	22%	12%	14%
	Don't know	28%	50%	24%	37%	35%	9%	20%
	Total	100%	100%	100%	100%	100%	100%	100%

Percentages refer to EaP country residents who have heard of the EU

TABLE A3 – Benefits from current EU support

Q2.8. To what extent would you say that your country has benefitted from the current European Union support in the following areas? (Percentage of the population who answered “very much” or “fairly”)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Improved democracy	51%	43%	35%	45%	41%	26%	30%
Greater economic development	38%	40%	28%	37%	44%	20%	28%
Access to more products and services	56%	46%	37%	52%	53%	47%	49%
More tourism	68%	65%	56%	81%	49%	53%	57%
Improved infrastructure	59%	56%	49%	54%	56%	26%	33%
Improved trade	51%	45%	35%	46%	53%	44%	48%
Better education	58%	48%	40%	53%	52%	31%	38%
Greater employment opportunities	23%	23%	21%	30%	44%	37%	38%
Improved agricultural production	36%	39%	27%	36%	49%	26%	32%
Less corruption	29%	36%	25%	34%	30%	15%	19%
Better law enforcement	41%	42%	29%	38%	33%	30%	32%
Improved quality of healthcare system	59%	50%	42%	54%	51%	23%	32%
Improved quality of the justice system	63%	57%	52%	57%	37%	18%	25%

Percentages refer to EaP country residents who have heard of the EU

TABLE A4 – 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? (Three most important areas)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Improved democracy	21%	15%	13%	13%	15%	16%	16%
Promote economic development	42%	24%	50%	51%	34%	60%	52%
Promote access to more products and services	7%	6%	24%	3%	7%	8%	10%
Increase tourism	18%	36%	30%	11%	10%	7%	14%
Improved infrastructure	13%	8%	20%	9%	30%	13%	14%
Improved trade	13%	25%	33%	11%	16%	6%	13%
Promote better education	30%	43%	24%	31%	21%	17%	22%
Create greater employment opportunities	27%	33%	35%	49%	28%	38%	37%
Improve agricultural production	23%	14%	11%	22%	21%	21%	19%
Reduce corruption	34%	23%	13%	11%	44%	45%	36%
Promote better law enforcement	9%	8%	11%	8%	20%	13%	12%
Improve quality of healthcare system	37%	21%	26%	36%	30%	29%	28%
Improve quality of the justice system	19%	7%	3%	14%	13%	11%	10%

Percentages refer to EaP country residents who have heard of the EU

TABLE A5 – Media usage frequency

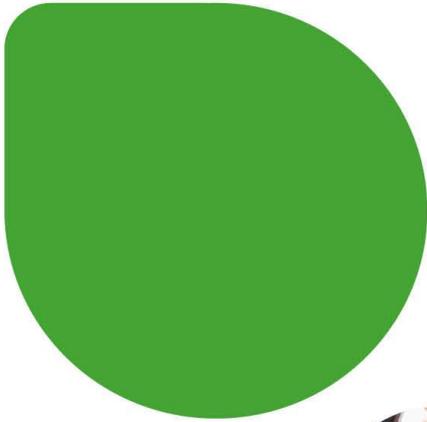
Q3.7. & Q3.8. How frequently would you say that you use the following? (Percentage of population who answered “always” or “often”)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Television	73%	80%	73%	82%	65%	68%	71%
Word of mouth	53%	41%	61%	40%	45%	53%	52%
Internet	55%	46%	53%	33%	57%	49%	49%
Social media	42%	37%	43%	35%	41%	41%	41%
Radio	16%	13%	23%	8%	26%	17%	18%
Print media	14%	6%	23%	4%	13%	23%	19%
Official EU website	7%	2%	2%	3%	10%	4%	4%
Country's media in national language	73%	82%	21%	81%	70%	57%	57%
Country's media in Russian	36%	22%	74%	9%	53%	48%	46%
Foreign media in Russian	31%	18%	49%	9%	39%	16%	22%
Foreign media in other languages	16%	10%	3%	11%	13%	8%	7%
Country's media in other languages	15%	7%	3%	8%	12%	6%	7%

TABLE A6 – 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? (Percentage of population who answered “Tend to trust”)							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Television	55%	66%	60%	72%	52%	56%	58%
Internet	42%	37%	57%	44%	53%	51%	50%
Social media	35%	28%	48%	40%	36%	43%	41%
Radio	30%	24%	46%	21%	30%	38%	36%
Print media	29%	18%	49%	33%	27%	44%	40%
Official EU website	19%	11%	28%	20%	22%	36%	29%
Word of mouth	47%	29%	77%	46%	43%	68%	61%
Country's media in national language	58%	76%	50%	69%	54%	50%	55%
Country's media in Russian	41%	30%	62%	19%	44%	38%	40%
Foreign media in Russian	35%	24%	49%	15%	38%	23%	27%
Country's media in other languages	22%	22%	22%	20%	21%	23%	22%
Foreign media in other languages	20%	17%	20%	19%	22%	24%	22%

TABLE A7 – Most pressing problems in EaP countries

Q4.2. What do you consider to be the most pressing problems facing your country?							
	Armenia	Azerbaijan	Belarus	Georgia	Moldova	Ukraine	EaP Total
Unemployment	50%	72%	55%	81%	37%	32%	44%
Economic crisis	17%	12%	34%	44%	30%	34%	31%
Corruption	21%	28%	16%	5%	48%	33%	29%
Low living standard, poverty	27%	23%	41%	32%	40%	45%	40%
Territorial conflicts	8%	18%	1%	21%	3%	7%	8%
Security issues / war	14%	19%	3%	6%	2%	37%	26%
Low salaries / pensions	24%	38%	60%	33%	49%	30%	36%
High prices and taxes	13%	18%	44%	28%	21%	25%	26%
Unaffordability of healthcare	13%	5%	9%	18%	10%	12%	11%
Education quality	14%	12%	5%	9%	8%	7%	8%
Absence of rule of law	10%	8%	8%	7%	7%	5%	6%
Migration	24%	2%	1%	7%	30%	3%	5%



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

www.uk.ecorys.com

Rue Belliard 12
1040 Brussels
Belgium

T +32 2 743 89 49

F +32 2 732 71 11