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ANNUAL SURVEY REPORT: BELARUS – 1st Wave (Spring 2016)

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

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

1. Background

Between April and June 2016, annual surveys were carried out across the six Eastern Partnership countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood - Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (EU Neighbours East) project.

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

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

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that the citizens of the EaP countries have, in general, about the EU and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys will be carried out annually for the next 3 years.

This document represents the results of the **Annual Survey - 1st wave** conducted in **Belarus¹** and covers the following broad topics:

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

The first wave of the surveys places particular emphasis on collecting data about sources of information used by citizens in order to support the implementation of effective awareness-raising and information campaigns. For this purpose, the surveys address the access, usage, level of trust and influence of different sources of information in general and in relation to the EU.

¹ A similar report is produced for each EaP country as well as a macro-area report that is about comparisons between countries.

2. Research Methodology in Brief

The survey was conducted in the second half of May 2016 and data was collected through face-to-face interviews using a structured questionnaire. One thousand completed 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 living in the country), the sampling weights were calculated applying a specifically designed estimation procedure.

Sampling strategy

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

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population and level of urbanization, and geographical area. Three groups of settlements² and three areas³ were used for a total of 9 strata. Within each stratum, 3-4 sample units were randomly selected with a proportional-to-size probability. 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 was carried out. The excess interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was stratified as well. In this case, gender and age⁴ were considered for a total of 6 strata. In each selected settlement, secondary sampling units were distributed among strata using a proportional allocation.

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

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator based on the

² Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Middle size settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants)

³ Geographic areas: 1) East (Mahilëŭ and Homel Regions); 2) North-Centre (Minsk - included the City of Minsk - and Vicebsk Regions); 3) West (Hrodna and Brëst Regions)

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

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, defining a step is necessary. 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 of predefined number of households.

general category of model-assisted estimators was built (Deville and Särndal 1992)⁶. 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 aim of the calibration weight adjustment was to bring weighted sums of the sample data into line with the corresponding counts in the target population. More specifically, the calibration procedure allowed computing calibrated weights as close as possible, according to a given distance measure⁷, to the sampling design weights under a certain set of constraints (the calibration equations) linked to the auxiliary information. When auxiliary information is available, the calibration technique ensures high efficiency of estimates and produces an accurate representation of the phenomena of interest. The calibration variables used to produce calibrated weights were settlements size, gender, age, employment status and geographic area. The concatenation of the calibration variables and number of calibration equations are appended in Annex 1. The input data for the calibration procedure came from the official national statistics on population of each country. The known population totals used in the calibration procedure are reported in Annex 1.

⁶ DEVILLE JC, SARNDAL, C.-E. (1992). Calibration Estimators in Survey Sampling. *Journal of the American Statistical Association*, Vol. 87, No. 418, June 1992, pp. 376-382.

⁷ The logarithmic distance was applied.

3. Survey Findings

3.1 Executive Summary

General Perceptions about the EU

- The largest proportion of Belarusians (46%) had a neutral image of the EU, while a slightly lower proportion had a fairly positive (31%) or very positive (6%) image of the EU.
- The neutral stance towards the EU appears to stem primarily from a lack of interest: two out of five neutral Belarusians (41%) stated that they are simply not interested in EU-related issues.
- Out of the many reasons which attract Belarusians towards the EU, the most important appears to be the economic prosperity of EU countries (33%). Moreover, the EU is perceived as offering an opportunity for work, trade, business and investment, due to its economic stability and open borders (18%).
- The most widely acknowledged factor related to a negative attitude towards the EU was a lack of trust (19%). It is worth mentioning that in some cases those Belarusians who disliked the EU admitted that the reason for their negative view was the EU's attitude towards Russia and/or Belarus (9%).

Values Associated with the EU

- The vast majority of associations related to the EU are positive. The top five positive concepts that Belarusians cited whilst thinking about the EU included the rule of law and human rights, freedom of speech, individual freedom, democracy and peace, security and stability. Negative associations were recorded only in 5% of cases and essentially related to behaviour seen as 'immoral', including legalisation of same-sex marriages, prostitution and drugs.
- Belarusians were most likely to link the EU to concepts of freedom (individual, of religion, speech and media, between 73% and 78%), human rights (77%) and economic prosperity (74%), and much less with values such as the absence of corruption (36%), peace, security and stability (52%) and honesty & transparency (52%).
- The top five values for Belarusians themselves are peace, security and stability (28%), economic prosperity (21%), human rights (12%), individual freedom (9%) and the rule of law (7%). Interestingly, although three out of the five values that are of a top priority for Belarusians are strongly associated with the EU, the percentage of residents who regard them as important is very low.

EU relations with Belarus

- Most Belarusians (58%) acknowledge that the EU's relations with Belarus are good while one out of four (26%) describe them as bad and 11% did not know.

Awareness and Effectiveness of EU Financial Support

- There is limited awareness of EU financial support. In fact, only 42% of Belarusians stated that the EU provides their country with financial support, while the rest of the population was equally split between those thinking that the EU did not provide any support (29%) and those who simply did not know (29%).
- Overall, the proportion of Belarusians who deem EU support effective (8% very good and 48% fairly good) outnumbers the more sceptical ones (32%), who doubt the effectiveness of EU cooperation programmes (27% fairly bad and 5% very bad).
- Awareness of particular programmes financed by the EU is extremely low across all the demographic and geographic segments of the population - only one out of ten Belarusians (11%) said they knew of EU programmes.
- The most widely acknowledged beneficial effects of EU support, for more than 60% of those asked, were an increase in tourism and trade. Corruption (20%), Agriculture (27%) and the Justice system (30%) were deemed the areas least impacted by EU support.
- When asked to compare the support provided by the EU with the support provided by different International Donors – the Russian Federation, IMF/WB, US, UN agencies – three out of five Belarusians believed that the Russian Federation supported Belarus more than the EU. However, the share of population that ‘didn’t know’ was significant, ranging from 14% (for the role of the Russian Federation) to 29% (for the US).
- 38% of the population felt that the European Union should play a greater role in economic processes, business development and investment issues. Other sectors spontaneously mentioned were health care, education and science, tourism, visa-free regime, trading issues, and commodity import-export issues.

Trust towards Organisations

- The majority of Belarusians tend to trust the Eurasian Union (57%). Quite a large portion also trusts the UN (53%), and 50% trusts the European Union. Only NATO scored extremely low in Belarus, with 61% of the population claiming not to trust the organisation. It seems that in general, the younger population and residents of large cities tend to trust the EU, UN and NATO more than other dwellers.

Internet & Social Media Usage

- The proportion of the population with Internet access in Belarus is high: overall four out of five citizens claim to have a computer connected to the Internet (79%) at home. Less than one quarter of the population (22%) uses a computer connected to the Internet at work.
- Belarusians are most likely to have accounts on Vkontakte and Odnoklassniki (49% both). A lower proportion of residents use Facebook (23%), Twitter (15%) and Instagram (11%), while virtually no one has LinkedIn (2%).
- Television is the most popular media channel in Belarus – 71% of residents watch it every day and 17% 2-3 times a week. Belarusians are far less likely to watch television on the Internet – only 10% watch it online every day, while 38% never watches it at all. An important share of Belarusians also uses

websites, blogs and social media regularly (42%-47% every day and 13%-15% 2-3 times a week). Nevertheless, almost two out of ten people never access Internet media channels and around 10% have no access to them at all.

Sources of Information for Political News

- Asked about their first source of information, most Belarusians replied public television (46%), followed by the Internet (29%), and, at a great distance, by the written press (9%) and the radio (4%). However, if we take into account the second most important source of information cited by Belarusians in their top two, the public printed press and private TV channels are also very popular (more than 20% in both cases).
- Public TV is crucial for reaching unemployed/inactive people, those living in smaller towns or in the West, and particularly older people. The Internet is considered a far more reliable source for daily and frequent users, such as people aged 15 to 34, while the press is especially popular among residents from eastern Belarus.
- Four out of five Belarusians rely primarily on local media to get news on national and international matters. Two out of five access foreign media in Russian and only one out of ten go to other foreign media.

Sources of Information about the EU

- Seven out of ten (69%) Belarusians admitted that they never look for information on the EU, and three out of ten (28%) stated that they do it only occasionally. Despite such a limited share of the population searching for information, the majority of Belarusians in all groups (percentages varying from 51% to 65%) had seen or heard information about the EU in the last 3 months.
- Television was the most frequently mentioned source of information for those who had heard about the EU in the past three months (77%), followed by social networks (20%), press (18%) and websites (13%).
- Usage of EU websites, portals and social media is very low in Belarus (between 1 and 3%). Most researched information relates to the economic situation and the development of the EU, work opportunities and educational trips in EU countries.
- The majority of Belarusians feel that the image of the EU in the national media is objective. Overall, more people think that the EU is presented in a positive way (32%) than in a negative way (9%). However, only 3% of the population is satisfied with the information on EU-related topics provided by the government and only 2% feel that what they read or watch significantly influences their perception of the EU.

Russian Media

- Russian TV channels, newspapers and news portals are extremely popular among the population of Belarus. One quarter of Belarusians (24%) stated that they always follow Russian media and almost two out of five (38%) said that they often do the same.

- NTV (73%) tops the list of Russian channels watched in Belarus, followed by RTR (57%), TNT (45%), ORT (30%) and MIR (24%). TNT is mostly watched by the younger generations (70% following) and vastly ignored by the population aged 55 and over (19%).
- Belarusians tend to follow the three main programme types on Russian TV to a similar degree – News (37%), Entertainment (30%) and Documentaries/Films (34%).

Country Evaluation and Future Expectations

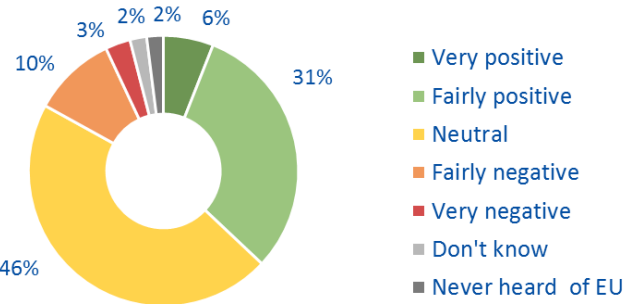
- Overall, Belarusians do not have a great trust in national, regional and local institutions: 55% trust the Government, 48% the Parliament and 44% regional and local public authorities. Trust in political parties is even lower; almost 60% of the population distrust them, while 16% has no opinion in this regard.
- Politically, Belarusians were almost equally split between those who felt fairly (44%) and very (4%) satisfied by the way democracy was functioning in Belarus and those who had a quite negative (30%) or very negative (12%) view. It should be noted that 10% of the population did not have an opinion in this regard.
- The most widely acknowledged elements of democracy in Belarus are gender equality (76%), rule of law (65%) and respect of human rights (64%). On the other hand, corruption and freedom of the media were deemed the most problematic elements by 59% and 44% percent of the population respectively.
- Overall, Belarusians are not particularly optimistic and roughly only 47% of the population feel confident in their country's future. The population is slightly more confident about their personal future and positive beliefs outweigh negative expectations (55% versus 42%).

3.2. Perceptions about the European Union

3.2.1 General Perceptions about the EU

The image of the EU in Belarus is fairly neutral or positive: the majority of Belarusians (46%) took a neutral stance (neither positive, nor negative), while a lower proportion had a fairly positive (31%) or very positive (6%) image of the EU. Only a small, but relevant, minority of Belarusians had a fairly negative (10%) or very negative (3%) image of the EU. 4% had never heard of the EU or had no opinion on this matter.

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



A relationship was found between the age, the size of the settlement where they live and their attitudes toward the EU: positive perceptions towards the EU decrease with age and increase with the settlements' size. Pro-EU attitudes are supported by 41% of citizens between the ages of 15 and 34, 36% of those aged 35-54, and only 34% of older residents (55+). This finding is confirmed by the proportion of Belarusians who are negatively inclined: 20% of over 55 versus 9% of younger people (between 15 and 34).

Belarusians living in smaller settlements (less than 20,000 inhabitants) seem to be less inclined to have a positive image of the EU in comparison with residents from bigger towns and cities.

TABLE 1. Perception of the EU

Q2.1 - Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?						
		Positive	Neutral	Negative	DK / Never heard	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	32%	49%	15%	4%	100%
	Between 20,000 - 150,000 inhabitants	43%	36%	16%	5%	100%
	Equal or more than 150,000 inhabitants	38%	48%	11%	3%	100%
GENDER	Male	40%	42%	14%	4%	100%
	Female	35%	49%	12%	4%	100%
AGE	15 - 34 years	41%	46%	9%	4%	100%
	35 - 54 years	36%	50%	11%	3%	100%
	55 years and over	34%	41%	20%	5%	100%
EDUCATION LEVEL ⁸	Low level	33%	52%	8%	7%	100%
	High level	38%	44%	15%	3%	100%
EMPLOYMENT STATUS	Employed	38%	48%	12%	3%	100%
	Unemployed /non active	37%	44%	15%	5%	100%
GEOGRAPHIC AREA	East	34%	47%	14%	5%	100%
	North-Centre	40%	44%	13%	4%	100%
	West	35%	49%	13%	4%	100%
TOTAL		37%	46%	13%	4%	100%

Note: Row percentages may not total 100 due to rounding

According to the survey findings, the neutral stance towards the EU stems from a lack of interest: two out of five neutral Belarusians (41%) state that they are simply not interested in EU-related issues. Moreover, 13% perceive the EU as distant from their life and 10% admit that they lack information about the EU. It should also be noted that another 10% mentioned reasons that negatively characterise the EU, such as lack of trust, perception of the EU as an ineffective organisation and inappropriateness of EU values.

Out of many reasons that make Belarusians favour the European Union, the most important appears to be the economic prosperity of EU countries: almost one out of four (23%) Belarusians that have a positive image of the EU spontaneously mentioned the standard of living in EU countries, while another 10% named the development of their economies. Moreover, the EU is perceived as an opportunity for work, trade, business and investment, due to its economic stability and open borders (18%). More than one out of four mentioned the freedom of movement inside the EU's borders. 8% of people also reported the EU support to Belarus among the main reasons for their positive attitude towards the EU.

The most widely acknowledged factor eliciting a negative attitude towards the EU was a lack of trust (19%). Belarusians who dislike the EU perceive it as selfish, dishonest, practising double standards, giving false promises. Some Belarusians expressed a fully negative in terms of government, foreign policy, economic policy, internal policy, etc. It is worth mentioning that in some cases Belarusians who dislike the EU admitted that the reason for their negative view was the EU attitude towards Russia and/or Belarus (9%). Some dwellers felt

⁸ Low level: fewer or equal to 12 years of education; High level: more than 12 years of education.

suspicious about the situation in European Union countries – they spoke about general problems such as the economic crisis, disorders, terrorism risks, Muslim refugees, prostitution, etc. The unfavourable population also mentioned the inappropriateness of EU values for Belarus.

3.2.2 Values Associated with the EU

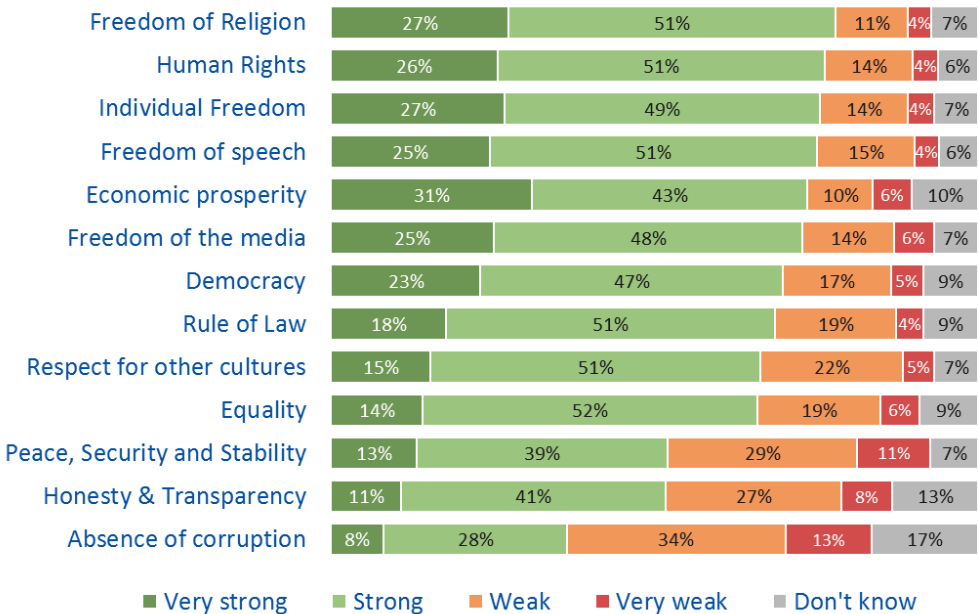
This section looks at the values that Belarusians mostly associate with the European Union. Results refer to those who have heard about the EU (98% of target population).

This section looks at the values Belarusians are most likely to associate with the European Union, which respondents were asked to name spontaneously. The top five values that Belarusians mentioned while thinking of the EU include the rule of law and human rights, freedom of speech, individual freedom, democracy and peace, security and stability. Other frequently mentioned values include: equality, economic development and prosperity, a high standard of living, welfare and environmental protection. In brief, the vast majority of associations were positive, and negative associations were recorded only in 5% of cases, and essentially related to ‘immoral behaviours’, such as depravity, perversity, debauchery, legalisation of same-sex marriages, prostitution, and soft drugs.

Belarusians’ perception of the extent to which the European Union represents certain values confirmed the above results, as the great majority of the population strongly linked the EU with 10 out of the 13 chosen values.

In particular, the values most strongly related to the EU were freedom of religion (78%), human rights (77%),

Q2.3 - To what extent does the European Union represent the following values for you?*



*Percentages refer to Belarusians who have heard about the EU

individual freedom (76%), freedom of speech (76%), economic prosperity (74%) and freedom of media (73%).

It is noteworthy that, according to the survey, values such as Absence of Corruption (36%), Honesty & Transparency (52%) and peace, security and stability (52%) had a much weaker link with the EU.

At the same time, respondents were asked about the most important values in Belarus. The top five named values were peace, security and stability (the most important for 28% of Belarusians), economic prosperity (21%), human rights (12%), individual freedom (9%) and the rule of law (7%).

Interestingly, three out of these top five values are strongly associated with the EU – namely economic prosperity, human rights and individual freedom – while the other two – namely peace, security & stability and rule of law – are not deemed characteristics prevalent in the European Union.

Furthermore, respect for other cultures, freedom of religion and freedom of media appeared to be among the least important categories, each ranked in the top three most important values by a mere 5% of the population.

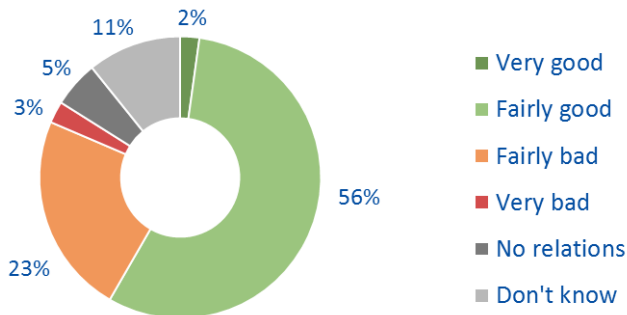
TABLE 2. The Most Important Values in Belarus

Q2.4 - Which of the following values are most important to you? Indicate the 3 most important values.			
	First	Second	Third
Peace, Security and Stability	28%	19%	12%
Economic prosperity	21%	16%	20%
Human Rights	12%	15%	11%
Individual Freedom	9%	10%	11%
Rule of Law	7%	11%	10%
Democracy	5%	4%	5%
Freedom of speech	5%	3%	5%
Honesty & Transparency	4%	6%	5%
Absence of corruption	2%	5%	8%
Equality	2%	5%	5%
Respect for other cultures	1%	2%	2%
Freedom of Religion	1%	2%	2%
Freedom of the media	0%	2%	3%

3.3. EU Relations with Belarus

Most Belarusians (58% of those who have heard about the EU) acknowledge that the EU’s relations with Belarus are good. One out of four residents (26%) describes them as bad and 11% do not know.

Q2.5 - In general, how would you describe the relations that the European Union has with your country?*



*Percentages refer to Belarusians who have heard about the EU

Those living in middle size towns and cities perceive relations in a more positive way than residents of small or large cities (70%, 58% and 53% respectively). Unemployed or inactive residents were more likely to evaluate EU-Belarus relations more positively than the employed (64% and 54% respectively). The same pattern emerges for women versus men (61% and 55% respectively).

The cross-table below shows the difference in the perception of Belarusians living in different geographical areas: the great majority (66%) of the inhabitants of the eastern part of the country

regard Belarus-EU relations as good. Those living in the Northern-Central part of Belarus tend to be slightly less favourable (58%) and even fewer dwellers (53%) from the West of the country share the same point of view.

TABLE 3. The EU’s Relations with Belarus

Q2.5 - In general, how would you describe the relations that the European Union has with your country?					
		Good	Bad	DK / No relations	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	58%	27%	15%	100%
	Between 20,000 - 150,000 inhabitants	70%	17%	13%	100%
	Equal or more than 150,000 inhabitants	53%	29%	18%	100%
GENDER	Male	55%	30%	15%	100%
	Female	61%	22%	17%	100%
AGE	15 - 34 years	62%	24%	14%	100%
	35 - 54 years	53%	31%	16%	100%
	55 years and over	60%	21%	18%	100%
EDUCATION LEVEL ⁸	Low level	60%	23%	17%	100%
	High level	58%	28%	15%	100%
EMPLOYMENT STATUS	Employed	54%	29%	17%	100%
	Unemployed /non active	64%	21%	15%	100%
GEOGRAPHIC AREA	East	66%	29%	5%	100%
	North-Centre	58%	21%	21%	100%
	West	53%	30%	18%	100%
TOTAL		58%	26%	16%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about the EU

3.3.1. Awareness and Effectiveness of EU Financial Support

This section looks at how Belarusians see the financial support of the European Union to their country. Results refer only to those who have heard about the European Union (98% of target population).

Public perception of EU financial support does not match the reality. In fact, a minority of residents were aware of EU support for technical assistance programmes. Only 42% of Belarusians stated that the EU provides the country with financial support, while the rest of the population was equally split between those thinking that the EU did not provide any support (29%) and those who simply did not know (29%).

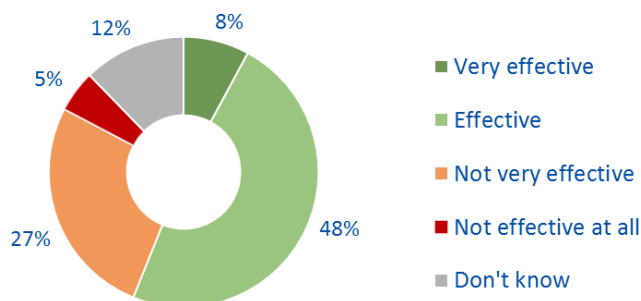
Although the low awareness of the EU role is shared by all population groups (by gender, age, education and employment), people living in the North-Centre of the country appeared to be the least informed about the issue: more than two out of five dwellers (42%) stated that they had never heard of EU cooperation programmes. On the other hand, three quarters (75%) of residents from western Belarus and almost nine out of ten (91%) from eastern Belarus are informed of these cooperation activities.

TABLE 4. European Union provides Belarus with financial support for cooperation programmes

Q2.6 - As far as you know, does the European Union provide your country with financial support for cooperation programmes?					
		Yes	No	Don't Know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	39%	35%	27%	100%
	Between 20,000 - 150,000 inhabitants	39%	31%	30%	100%
	Equal or more than 150,000 inhabitants	45%	24%	31%	100%
GENDER	Male	43%	30%	27%	100%
	Female	40%	29%	31%	100%
AGE	15 - 34 years	45%	24%	31%	100%
	35 - 54 years	41%	32%	28%	100%
	55 years and over	39%	32%	29%	100%
EDUCATION LEVEL ⁸	Low level	41%	25%	34%	100%
	High level	41%	31%	28%	100%
EMPLOYMENT STATUS	Employed	43%	29%	29%	100%
	Unemployed /non active	40%	30%	30%	100%
GEOGRAPHIC AREA	East	52%	39%	9%	100%
	North-Centre	33%	26%	42%	100%
	West	48%	26%	25%	100%
TOTAL		42%	29%	29%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about the EU

Q2.6.1 - How effective do you think the support has been?*



*Percentages refer to Belarusians who are aware of the EU's financial support for cooperation programmes

Among Belarusians who are aware of EU's financial support, the proportion that deems EU support effective (8% very good and 48% fairly good), outnumbers the more sceptical Belarusians (32%), who distrust the effectiveness of EU support for cooperation programmes (27% fairly bad and 5% very bad).

The attitude towards the EU support seems to vary according to the area of geographical residence: those living in the eastern part of the country seemed to be more dissatisfied (38%) than their counterparts living in western regions (24%). In addition, significantly fewer Belarusians from the

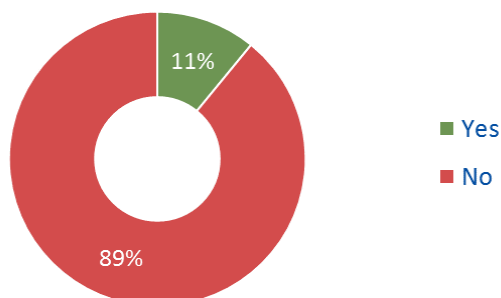
smallest towns felt that EU support was effective (41%), compared to those from larger cities (63%).

TABLE 5. Effectiveness of EU Support

Q2.6.1 - How effective do you think the support has been?					
		Effective	Not effective	Don't Know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	41%	39%	20%	100%
	Between 20,000 - 150,000 inhabitants	65%	20%	15%	100%
	Equal or more than 150,000 inhabitants	63%	31%	7%	100%
GENDER	Male	58%	30%	13%	100%
	Female	55%	33%	12%	100%
AGE	15 - 34 years	59%	30%	11%	100%
	35 - 54 years	56%	32%	12%	100%
	55 years and over	53%	33%	15%	100%
EDUCATION LEVEL ⁸	Low level	51%	31%	18%	100%
	High level	56%	35%	9%	100%
EMPLOYMENT STATUS	Employed	58%	32%	10%	100%
	Unemployed /non active	53%	31%	16%	100%
GEOGRAPHIC AREA	East	57%	38%	5%	100%
	North-Centre	55%	32%	13%	100%
	West	56%	24%	20%	100%
TOTAL		56%	32%	12%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who are aware of the EU's financial support for cooperation programmes

Q2.8 - Do you know of any specific programmes financed by the European Union in your country?*



*Percentages refer to Belarusians who have heard about the EU

Awareness of particular programmes financed by the EU is extremely low across all demographic and geographic segments of the population - only one out of ten Belarusians (11%) said that they knew of EU programmes. Perception was particularly low among women, older people, residents of smaller settlements, and the unemployed or inactive.

The only specific programmes recalled were the ecological programme “Change your latitude” (15%) and the educational programmes “Erasmus”, “Erasmus Mundus” and “Erasmus+” (7%). The other programmes mentioned were generically related to the economy, culture, trade, healthcare and social issues.

According to the survey findings, only 1% of Belarusians have personally been (or know someone) involved in recent EU-funded projects.

The most widely acknowledged beneficial effects of EU support were the increase in tourism (63% of Belarusians felt that the EU had a role to play) and in trade (62%). A majority of Belarusians also believed that access to products and services has increased (58%) and education has improved (54%) as a result of EU support. According to the survey results, corruption (20%), agriculture (27%) and the justice system (30%) were the areas least affected by EU support.

TABLE 6. Benefits from current EU support

Q2.9 - To what extent would you say that your country has benefitted from the current European Union support?						
	Very much	Fairly	Not very	Not at all	Don't know	Total
More tourism	22%	41%	20%	14%	4%	100%
Improved trade	19%	43%	24%	10%	4%	100%
Access to more products and services	16%	42%	25%	13%	5%	100%
Better education	16%	38%	25%	15%	6%	100%
Improved quality of health-care system	14%	35%	24%	21%	7%	100%
Greater economic development	13%	34%	28%	19%	5%	100%
Improved infrastructure (streets, sewage, water, etc.)	13%	28%	24%	25%	10%	100%
Greater employment opportunities	12%	25%	30%	27%	6%	100%
Better law enforcement	7%	26%	26%	27%	14%	100%
Improved democracy	6%	29%	26%	27%	13%	100%
Improved quality of the justice system	6%	24%	24%	30%	16%	100%
Improved agricultural production	5%	22%	29%	32%	13%	100%
Less corruption	5%	15%	28%	39%	14%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about the EU

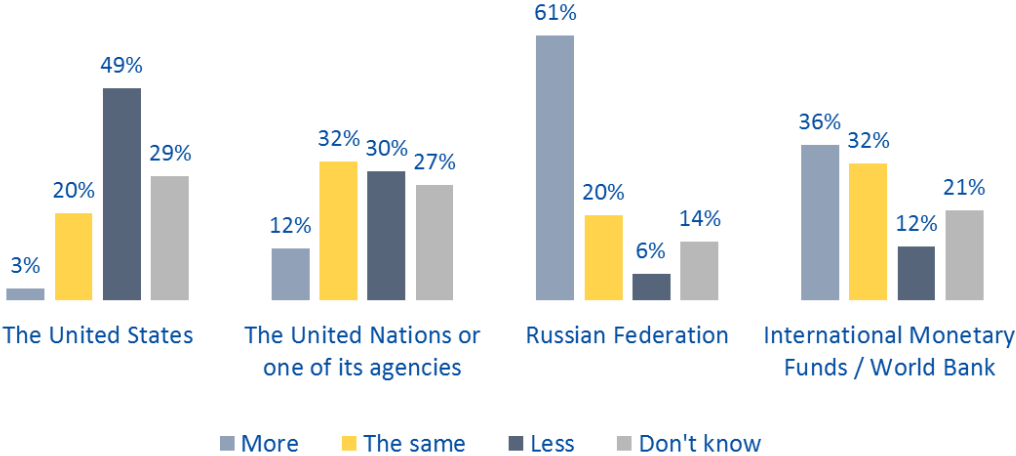
Almost one out of four Belarusians felt that the European Union should play a greater role in economic processes, business development and investment issues. Healthcare and the medical sphere (11%), and education and science (10%) also appeared to be of particular concern to the Belarus population. Other sectors spontaneously mentioned were tourism, visa-free regime, trading issues, and commodity import-export issues.

Respondents were also asked to compare the support provided by the EU with the support provided by different international donors – the Russian Federation, International Monetary Fund/World Bank (IMF/WB), United States (US), and United Nations (UN) agencies. Three out of five Belarusians (61%) believed that the Russian Federation supported their country more than the EU, while one out of five (20%) deemed equal the support provided by Russia and the EU. 36% of citizens believed that IMF/WB financial support exceeded that of the EU and almost a third (32%) that the EU and IMF/WB provided similar financial support.

Only 3% of population in Belarus thinks US support is greater than that of the EU. One fifth (20%) thinks it is similar and almost half of the population (49%) believes EU support to Belarus exceeds US financial support. 12% think UN agencies support Belarus more than the EU. One third (32%) think that the volume of financial support of these two institutions is similar, while the rest (30%) believes UN support is smaller.

It is important to note that a significant proportion of Belarusians answered “don’t know”, ranging from 14% (in the case of the Russian Federation) to 29% (the United States).

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



*Percentages refer to Belarusians who have heard about the EU

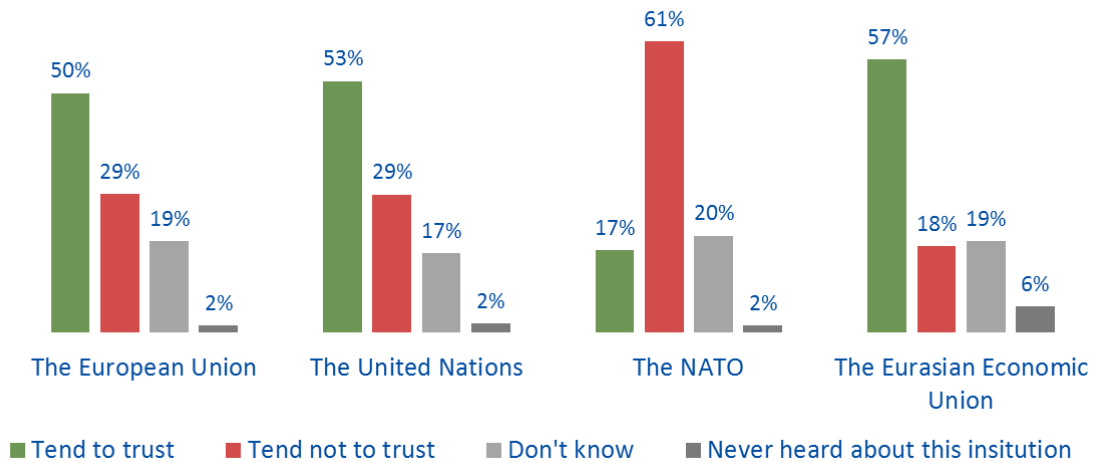
3.3.2. Trust towards Organisations

When asked about their trust towards international organisations, the majority of Belarusians said that they trusted them. The Eurasian Union scored the highest percentage (57%), followed by the United Nations (53%), and the European Union (50%). Only NATO scored extremely low with 61% of Belarusians claiming not to trust the organisation.

In general, the younger population and residents of large cities tend to trust the EU, UN and NATO more than older generations and small city dwellers. No significant demographic and geographic differences were identified in terms of trusting the Eurasian Union.

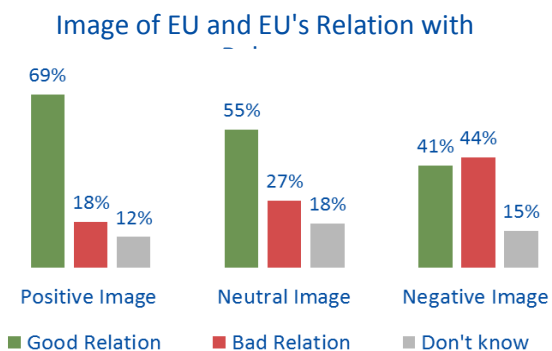
People living in the West of the country trust the EU more than in the north-centre or in the East (55%, 50% and 46% respectively). As for the UN, it is more trusted in the eastern and north-central parts of the country (54% and 57% respectively), while in the West more people trust the EU than the UN (55% versus 46%).

Q2.12 - I would like to ask you a question about how much trust you have in certain institutions



Attitudes towards the EU: a snapshot

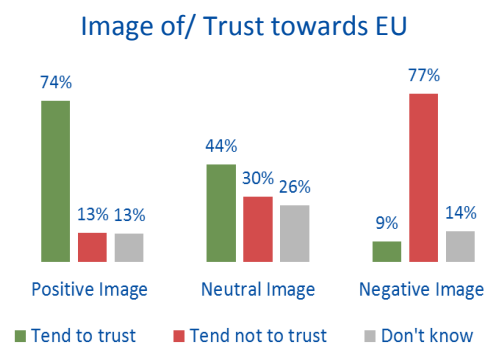
Belarusians' self-perceived image about the EU (which, as we saw, shows a strong correlation with the age of the population and the size of the settlement where they live) has a clear relation to their consistency of opinion about the EU.



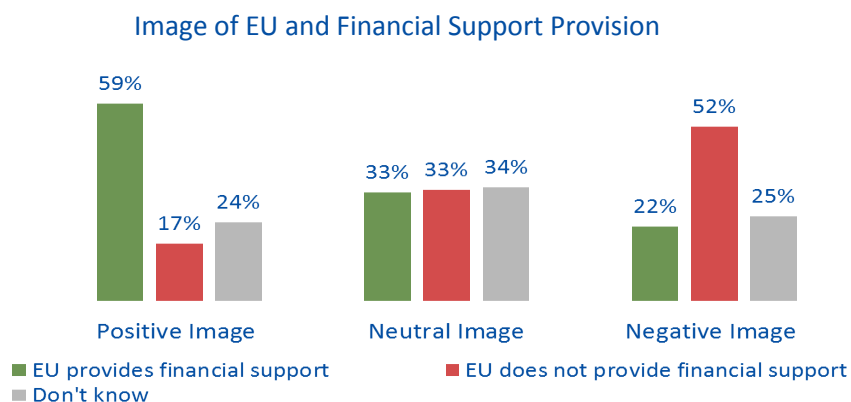
A cross-analysis of the Belarusians' image of the EU (positive, neutral and negative) with their perception of the relations between the EU and their country, the awareness of the EU financial provision and their trust in the EU, confirms that those with the most positive image of the EU are also those most likely to have the highest level of trust in the EU (74%), to value positively the relations between the EU and Belarus (69%) and to be

more informed about the support provided by the EU (59%).

On the other hand those who have a negative image about the EU were more likely to have a consistently bad opinion about the EU's relations with Belarus (44% rated the relationship as "bad" and 41% as "good), to believe the EU did not provide any financial support (52%) and to have, especially, the lowest levels of trust in the EU. Overall, 77% in this group tended not to trust the EU versus 13% of those who claimed they had a positive image of the EU.



As for those sharing a neutral image, more than half of those belonging to this group deemed positively the EU's relations with Belarus (55%), 44% tended to trust the EU and only one-third (33%) was aware of the financial support provided by the EU.



3.4 Sources of Information

3.4.1. Internet & Social Media Usage

The proportion of the population with an Internet connection is high in Belarus: overall four out of five citizens own a computer connected to the Internet (79%). Both urbanisation and age are important socio-economic factors that influence computer ownership. PC ownership is most prevalent in large cities (84%); nevertheless, three quarters of small settlement residents (74%) also claimed to have a computer at home. Virtually all young people have a computer (94% of citizens aged 15-34 years), while this falls to almost six out of ten people aged over 55. Rates are particularly low for unemployed or inactive (69%), especially if compared to the employed population (87%).

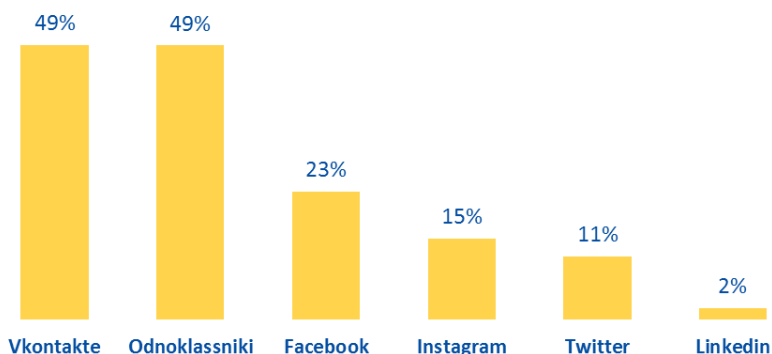
Internet connection is less prevalent in work settings: less than one quarter of the population (22%) uses a computer connected to Internet at work.

TABLE 7. Percentage of population who have a computer with Internet at home or work

		Q3.1.1 - Do you have a computer at home connected to the Internet?	Q3.1.2 - Do you have a computer at work connected to the Internet?
		Computer at home	Computer at work
SETTLEMENT SIZE	Less than 20,000 inhabitants	74%	24%
	Between 20,000 - 150,000 inhabitants	79%	15%
	Equal or more than 150,000 inhabitants	84%	25%
GENDER	Male	82%	22%
	Female	78%	23%
AGE	15 - 34 years	94%	20%
	35 - 54 years	87%	37%
	55 years and over	57%	9%
EDUCATION LEVEL ⁸	Low level	78%	14%
	High level	82%	28%
EMPLOYMENT STATUS	Employed	87%	39%
	Unemployed /non active	69%	0%
GEOGRAPHIC AREA	East	83%	25%
	North-Centre	82%	22%
	West	70%	21%
TOTAL		79%	22%

Belarusians are mostly like to have accounts on Vkontakte (49%) and Odnoklassniki (49%). A relatively lower proportion of people use Facebook (23%), Instagram (15%) and Twitter (11%), while virtually no one has LinkedIn (2%).

Q3.1.3 - Do you have accounts with any of the following?
People with a Social Media account



The categories that are most frequent users of social networks are young people (Vkontakte: 88%; Odnoklassniki: 61%; Facebook: 41%), while people aged 55 years and over are least likely to use them (respectively 15%, 29% and 7%). People living in small and medium settlements or in North-Central Belarus are more frequent users of online social networks.

TABLE 8. People with a Social Media account

Q3.1.3 - Do you have accounts with any of the following?							
		Facebook	Twitter	Instagram	LinkedIn	Vkontakte	Odnoklassniki
SETTLEMENT SIZE	Less than 20,000 inhabitants	19%	10%	9%	1%	42%	50%
	Between 20,000 - 150,000 inhabitants	18%	13%	11%	3%	52%	50%
	Equal or more than 150,000 inhabitants	28%	12%	20%	2%	54%	48%
GENDER	Male	22%	11%	12%	1%	49%	42%
	Female	24%	11%	17%	3%	50%	55%
AGE	15 - 34 years	41%	24%	32%	4%	88%	61%
	35 - 54 years	21%	9%	10%	2%	45%	58%
	55 years and over	7%	1%	2%	0%	15%	29%
EDUCATION LEVEL ⁸	Low level	23%	15%	19%	1%	50%	45%
	High level	23%	10%	14%	3%	50%	52%
EMPLOYMENT STATUS	Employed	25%	10%	13%	3%	54%	57%
	Unemployed /non active	20%	14%	17%	1%	44%	39%
GEOGRAPHIC AREA	East	19%	10%	15%	1%	47%	50%
	North-Centre	29%	13%	17%	3%	57%	51%
	West	16%	10%	10%	1%	38%	45%
TOTAL		23%	11%	15%	2%	49%	49%

Television is the most popular media channel in Belarus – 71% of population watches it every day and 17% 2-3 times in a week. Belarusians are far less likely to watch television over the Internet – only 10% watches it online every day, while 38% never watches it – and still prefer to rely on more traditional media, such as radio and printed press. This habit is more pronounced for over 55s. An important share of the population also uses websites, blogs and social media on a regular basis (42%-47% every day and 13%-15% 2-3 times a week). Nevertheless almost two out of ten people never access Internet media channels and around 10% has no access at all.

TABLE 9. Frequency of Media Usage

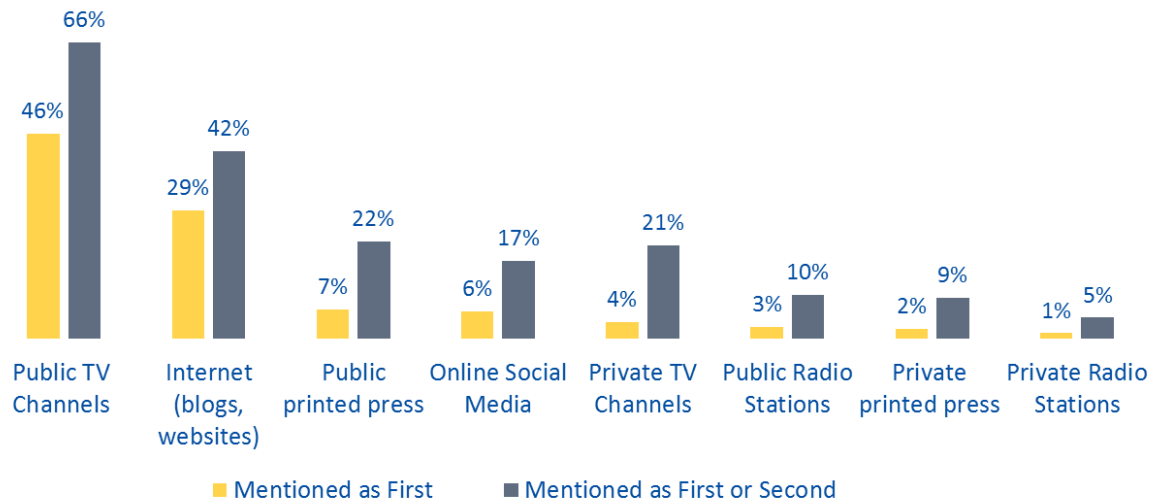
Q3.2 - Could you tell me to what extent you...?								
	Everyday/ Almost everyday	2-3 times a week	About once a week	2-3 times a month	Less often	Never	No access	Total
Watch television on a TV set	71%	17%	5%	2%	2%	2%	1%	100%
Use the Internet (websites, blogs)	47%	13%	5%	4%	5%	16%	10%	100%
Use online social networks	42%	15%	6%	4%	4%	18%	11%	100%
Listen to the radio	27%	15%	10%	6%	15%	17%	10%	100%
Watch television via the Internet	10%	10%	9%	9%	11%	38%	13%	100%
Read the printed press	17%	22%	19%	14%	16%	9%	3%	100%

Note: Row percentages may not total 100 due to rounding

3.4.2. Information Sources for Political News

When we focus on the “first” source of information mentioned by Belarusians, public television appears to be the top informant on national political matters (46%), followed by the Internet (29% of population use blogs and websites for information, while 6% rely on social media networks). Only 9% of the population named the written press (public and private) and 4% the radio (public and private).

Q3.3 - Where do you get most of your news on national political matters? Firstly? Secondly?



Although generally television is the most frequently used source of information for national political matters, this is not the case for the younger population. One out of two people aged between 15 and 34 gets the news on the Internet, while only a quarter gets it from public TV. Public TV is crucial for reaching people living in smaller towns or in western parts of the country, the unemployed/inactive and particularly older people. Only 7% of those aged 55 and over uses blogs and websites for information purposes and only 3% rely on social media networks.

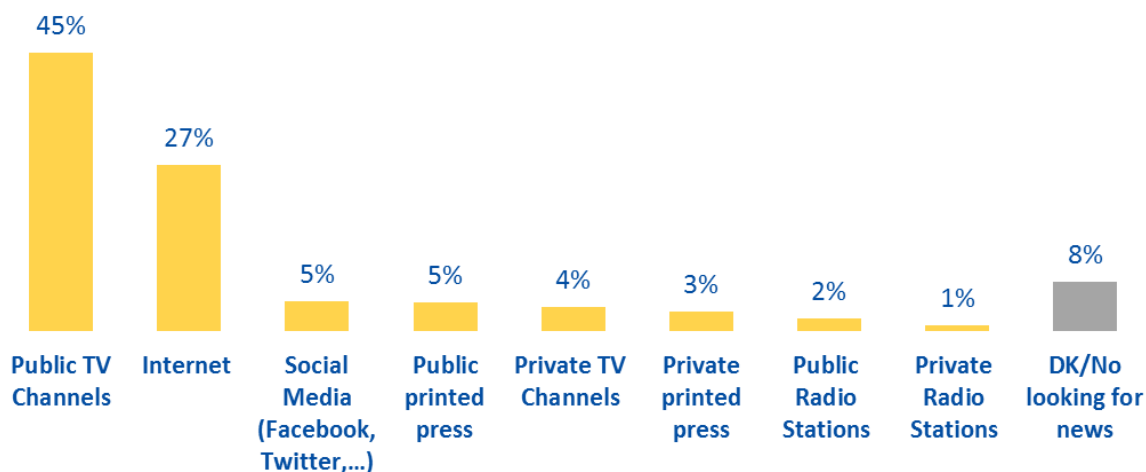
If we consider the two most important sources of information for national news, other popular answers are public printed press and private TV channels. One fifth of the population gets the news from these two sources (22% and 21% respectively). The press is especially popular among residents from eastern Belarus and older people. Next, residents mentioned online social media (17%) and public radio stations (10%).

TABLE 10. Public TV channels and Internet mentioned as first Source for News on National Political Matters

Q3.3 - Where do you get most of your news on national political matters? Firstly?			
		Public TV Channels	Internet
SETTLEMENT SIZE	Less than 20,000 inhabitants	53%	25%
	Between 20,000 - 150,000 inhabitants	44%	28%
	Equal or more than 150,000 inhabitants	41%	32%
GENDER	Male	42%	31%
	Female	49%	27%
AGE	15 - 34 years	26%	50%
	35 - 54 years	46%	29%
	55 and over	66%	7%
EDUCATION LEVEL ⁸	Low level	47%	27%
	High level	44%	31%
EMPLOYMENT STATUS	Employed	41%	32%
	Unemployed /non active	52%	24%
GEOGRAPHIC AREA	East	48%	25%
	North-Centre	41%	34%
	West	54%	23%
TOTAL		46%	29%

When asked to assess the credibility of the media sources, as expected a strong correlation with the most important source of information emerges: the majority of Belarusians again named Public TV channels (45%) as the most reliable sources of information, followed by Internet (27%). Other media were virtually not mentioned – in all cases percentages vary from 1 to 5%.

Q3.4 - Which source of information do you trust the most when looking for news on political matters?



The socio-demographic analysis reveals that Public TV was regarded as trustworthy mostly by smaller settlement residents, a female audience, unemployed/inactive and older people. Residents of eastern Belarus are also more inclined to trust Public TV than those from northern-central and western Belarus (56%, 38% and 46% respectively). As expected, the Internet is considered a far more reliable source for daily and frequent users, such as people aged 15 to 34.

TABLE 11. Most Reliable Sources for News on Political Matters

Q3.4 - Which source of information do you trust the most when looking for news on political matters?						
		Public TV Channels	Internet	Other	DK/No looking for news	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	48%	26%	19%	7%	100%
	Between 20,000 - 150,000 inhabitants	49%	21%	22%	8%	100%
	Equal or more than 150,000 inhabitants	41%	30%	20%	9%	100%
GENDER	Male	40%	30%	19%	11%	100%
	Female	49%	24%	21%	6%	100%
AGE	15 - 34 years	25%	46%	22%	7%	100%
	35 - 54 years	46%	29%	16%	9%	100%
	55 years and over	63%	6%	23%	8%	100%
EDUCATION LEVEL ⁸	Low level	44%	28%	19%	9%	100%
	High level	43%	27%	21%	8%	100%
EMPLOYMENT STATUS	Employed	40%	32%	21%	7%	100%
	Unemployed /non active	52%	20%	19%	9%	100%
GEOGRAPHIC AREA	East	56%	21%	21%	3%	100%
	North-Centre	38%	33%	21%	8%	100%
	West	46%	22%	18%	14%	100%
TOTAL		45%	27%	20%	8%	100%

Note: Row percentages may not total 100 due to rounding

The influence of mass media on public opinion is a widely discussed issue across the world and Belarus is no exception: nine out of ten (90%) people believe that TV forms public opinion (very much - 54%, fairly - 36%). Other media channels deemed influential include Internet websites (84%) social media (71%) and to a lesser extent radio (62%).

TABLE 12. Mass Media Influence on Public Opinion

Q3.5 - In your opinion, to what extent does your country's mass media influence public opinion?						
	Very Much	Fairly Much	Not Very Much	Not Much at all	Do Not Know	Total
Television	54%	36%	7%	1%	2%	100%
Websites	46%	38%	7%	1%	8%	100%
Printed Press	29%	51%	14%	3%	3%	100%
Radio	19%	43%	28%	7%	4%	100%
Social Media	31%	40%	12%	5%	13%	100%

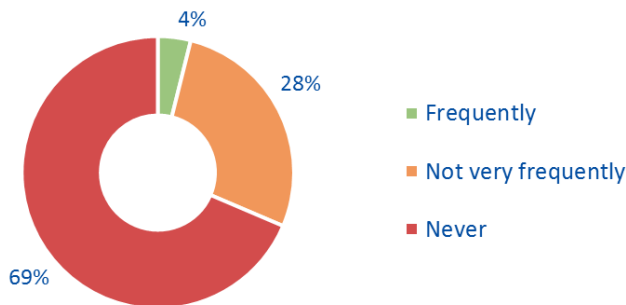
Note: Row percentages may not total 100 due to rounding

Four out of five Belarusians (80%) rely primarily on local media to get news on national and international matters. Two out of five use foreign media in Russian (40%) and only one out of ten (9%) other foreign media.

3.4.3. Information Sources about the EU

This section looks at sources of information about the European Union. Results only refer to those Belarusians who have heard about the European Union (98% of target population).

Q3.7 - How often do you look for/ access information on the EU?



**Percentages refer to Belarusians who have heard about EU*

When asked about their preferred sources of information about the EU, seven out of ten (69%) Belarusians admitted that they never look for information on the EU, and three out of ten (28%) stated that they do it only occasionally. It is noteworthy, that the language Belarusians use for these searches is virtually always Russian (chosen by 96% of the population; English was chosen by a mere 1%).

Belarusians who do not look for information about the EU very frequently, or at all, said that if they were to search for information on the EU, they would use the Internet (66%).

In view of such a limited share of the population searching for information, the majority of Belarusians in all group levels (percentages varying from 51% to 64%) had seen or heard information about the EU in the last three months.

Medium / large city residents (60-62%), males (64%), more educated people (60%) and those living in the eastern areas of the country (62%) have been relatively more exposed to information about the EU than other socio-demographic segments.

TABLE 13. Heard any Information about the EU in the Last Three Months

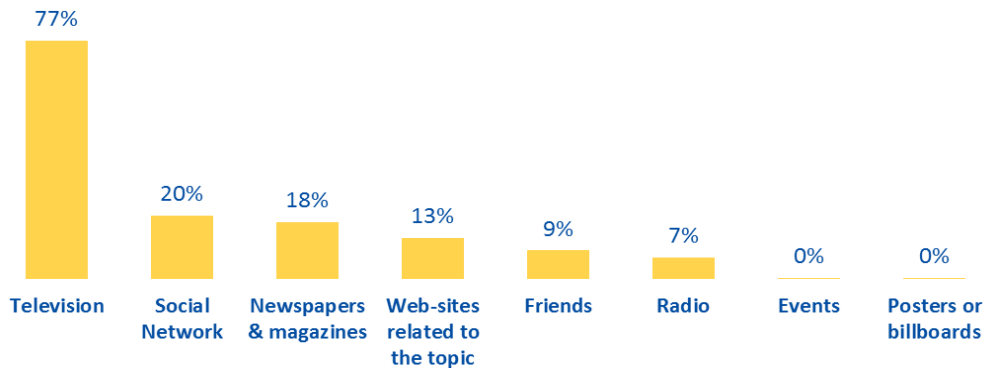
Q3.10 - Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	52%	48%	100%
	Between 20,000 - 150,000 inhabitants	62%	38%	100%
	Equal or more than 150,000 inhabitants	60%	40%	100%
GENDER	Male	64%	36%	100%
	Female	52%	48%	100%
AGE	15 - 34 years	62%	38%	100%
	35 - 54 years	57%	43%	100%
	55 years and over	54%	46%	100%
EDUCATION LEVEL ⁸	Low level	53%	47%	100%
	High level	60%	40%	100%
EMPLOYMENT	Employed	58%	42%	100%
	Unemployed /non active	57%	43%	100%
GEOGRAPHIC AREA	East	62%	38%	100%
	North-Centre	59%	41%	100%
	West	51%	49%	100%
TOTAL		58%	42%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about EU

Television was the most frequently mentioned source of information for those who had heard about the EU in the past three months. Social networks (20%), press (18%) and websites (13%) were also mentioned. However, it appears that the EU is not a usual topic of discussion among friends: only one out of 10 people claimed that they received information on the EU from a friend (9%). Even fewer Belarusians mentioned the radio (7%).

Q3.10.1 - People who have seen or heard any information about the EU in the last three months: Where or from whom?

(Multiple answers were possible)



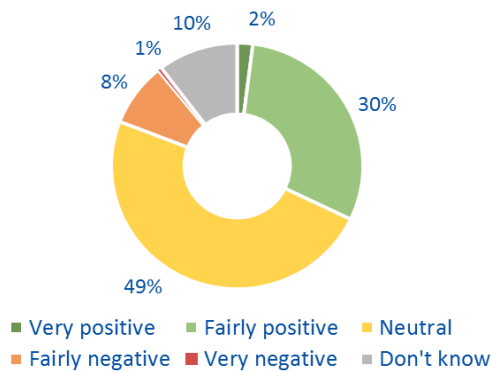
Usage of EU informational websites⁹ is very low in Belarus. The percentage of those relying on EU websites, portals and social media as a source of information varies between 1% and 3%.

Respondents were also asked about their topics of interest concerning the EU. Joining the Union, border issues, relationships between Belarus and the EU, all seemed issues of great concern for Belarusians, as well as work opportunities, salaries, everyday life and living conditions in EU countries. Among other areas of interest identified were economic issues, refugees, information about programmes and funding. In all groups, 15% to 30% of Belarusians felt satisfied with their level of information and were not interested in further issues.

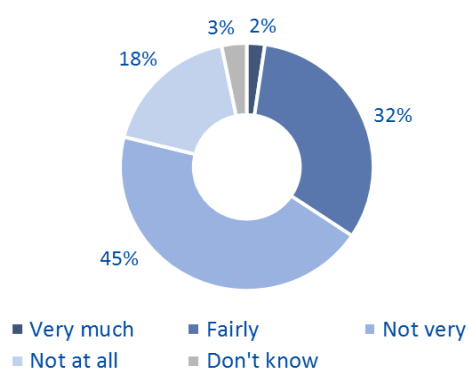
Furthermore, respondents were asked to evaluate the image of the EU on the national media. Half of the population felt that the national media presented the European Union objectively. Overall more Belarusians think that the EU is presented in a positive way (32%) than in a negative way (9%), but only 2% feel that the EU is presented in a very positive way.

When asked about influence on their own perception, only 2% feel that what they read or watch significantly influences their perception of the EU, while 32% admitted it is 'fairly' influential.

Q3.8 - In general, how would you say the EU was presented in the national media?



Q3.9 - To what extent does what you read, watch or access on-line have an influence on your perception of the EU?



**Percentages refer to Belarusians who have heard about EU*

According to cross analysis, the less influenced groups are people living in medium size settlements and those living in the western part of the country.

A minority of the population also cited the reliability and the truthfulness of the news about the EU from their government. According to the survey, 40% of the population is not satisfied with the level of information provided by the government on EU-related topics. Cross analysis shows that the most dissatisfied are residents from western Belarus (47%) and the less educated groups of the population (46%).

⁹ EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

TABLE 14. Influence on perception about the EU

Q3.9 - To what extent does what you read, watch or access on-line have an influence on your perception of the EU?					
		Influenced	Not Influenced	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	36%	62%	3%	100%
	Between 20,000 - 150,000 inhabitants	26%	72%	3%	100%
	Equal or more than 150,000 inhabitants	37%	59%	4%	100%
GENDER	Male	36%	63%	2%	100%
	Female	33%	62%	5%	100%
AGE	15 - 34 years	36%	60%	4%	100%
	35 - 54 years	31%	66%	3%	100%
	55 years and over	36%	61%	3%	100%
EDUCATION LEVEL ⁸	Low level	36%	62%	2%	100%
	High level	32%	64%	4%	100%
EMPLOYMENT STATUS	Employed	33%	65%	2%	100%
	Unemployed /non active	37%	59%	4%	100%
GEOGRAPHIC AREA	East	35%	64%	2%	100%
	North-Centre	38%	59%	3%	100%
	West	27%	68%	5%	100%
TOTAL		34%	63%	3%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about EU

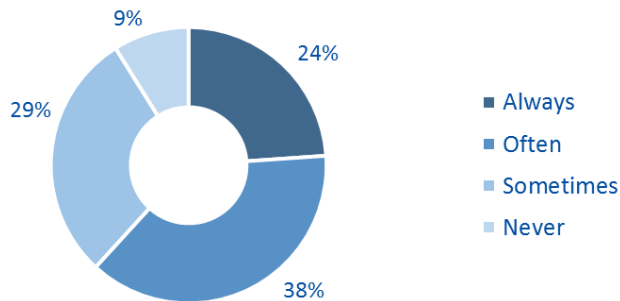
TABLE 15. Government Informing Public about Topics Related to the EU

Q3.14 - How well does your country government inform you about topics related to the EU?					
		Well	Not well	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	51%	41%	9%	100%
	Between 20,000 - 150,000 inhabitants	56%	34%	11%	100%
	Equal or more than 150,000 inhabitants	40%	43%	17%	100%
GENDER	Male	46%	42%	12%	100%
	Female	48%	39%	13%	100%
AGE	15 - 34 years	44%	41%	15%	100%
	35 - 54 years	45%	44%	11%	100%
	55 +	52%	36%	12%	100%
EDUCATION LEVEL	Less or equal to 11 years of education	44%	46%	10%	100%
	More than 11 years of education	51%	33%	16%	100%
EDUCATION LEVEL ⁸	Low level	44%	37%	19%	100%
	High level	51%	28%	21%	100%
GEOGRAPHIC AREA	East	57%	38%	6%	100%
	North-Centre	46%	39%	16%	100%
	West	39%	47%	14%	100%
TOTAL		47%	40%	13%	100%

Note: Row percentages may not total 100 due to rounding. Percentages refer to Belarusians who have heard about EU

3.4.4. Russian TV Channels

Q3.15 - Do you watch Russian TV channels, read Russian newspapers or visit Russian news portals online?



Russian TV channels, newspapers and news portals are extremely popular among Belarusians. One quarter of the population (24%) stated that they always follow Russian media and almost two out of five (38%) said that they often do the same.

Russian media are less widespread among the population living in western part of the country, younger generations and people living in bigger cities.

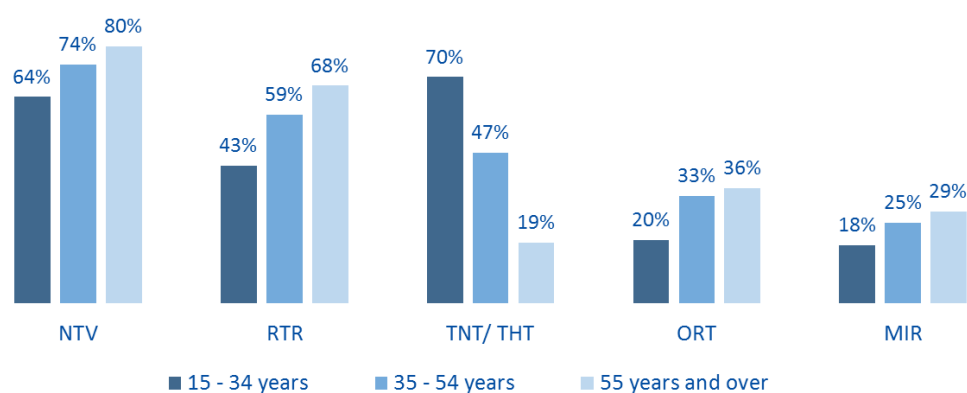
TABLE 16. Consuming Russian TV channels, Russian newspapers or Russian news portals online

Q3.15 - Do you watch Russian TV channels, read Russian newspapers or visit Russian news portals online?						
		Always	Often	Sometimes	Never	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	33%	40%	19%	9%	100%
	Between 20,000 - 150,000 inhabitants	24%	33%	38%	5%	100%
	Equal or more than 150,000 inhabitants	17%	39%	34%	11%	100%
GENDER	Male	24%	38%	30%	9%	100%
	Female	24%	38%	29%	9%	100%
AGE	15 - 34 years	22%	27%	39%	12%	100%
	35 - 54 years	24%	43%	25%	8%	100%
	55 years and over	26%	43%	25%	7%	100%
EDUCATION LEVEL ⁸	Low level	25%	33%	34%	9%	100%
	High level	24%	39%	27%	9%	100%
EMPLOYMENT STATUS	Employed	22%	40%	29%	9%	100%
	Unemployed /non active	26%	36%	29%	9%	100%
GEOGRAPHIC AREA	East	26%	41%	28%	5%	100%
	North-Centre	27%	37%	30%	6%	100%
	West	15%	37%	28%	19%	100%
TOTAL		24%	38%	29%	9%	100%

Note: Row percentages may not total 100 due to rounding

Among those who watch Russian TV, NTV (73%) tops the list of Russian channels watched in Belarus, followed by RTR (57%), TNT (45%), ORT (30%) and MIR (24%). The main difference between the categories relates to the age of the target audience: TNT is mostly watched by the younger generations (70% following) and more likely to be ignored by the population aged 55 and over (19%).

Q3.16 - If you watch Russian TV channels, which ones do you follow the most?
(Multiple answers were possible)



Belarusians who watch Russian TV tend to equally follow news and current affairs programmes (37%), entertainment (30%) and documentaries/Films (34%).

TABLE 17. Most Followed Russian TV Programmes

Q3.17 - If you watch Russian TV channels, do you mostly follow?					
		News and Current Affairs Programmes	Entertainment	Documentaries and Films	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	40%	25%	36%	100%
	Between 20,000 - 150,000 inhabitants	28%	33%	38%	100%
	Equal or more than 150,000 inhabitants	38%	32%	30%	100%
GENDER	Male	45%	27%	28%	100%
	Female	30%	32%	39%	100%
AGE	15 - 34 years	22%	50%	29%	100%
	35 - 54 years	38%	25%	37%	100%
	55 years and over	49%	15%	36%	100%
EDUCATION LEVEL ⁸	Low level	32%	33%	35%	100%
	High level	37%	29%	34%	100%
EMPLOYMENT STATUS	Employed	35%	30%	35%	100%
	Unemployed /non active	39%	29%	32%	100%
GEOGRAPHIC AREA	East	48%	29%	23%	100%
	North-Centre	30%	31%	39%	100%
	West	37%	26%	37%	100%
TOTAL		37%	30%	34%	100%

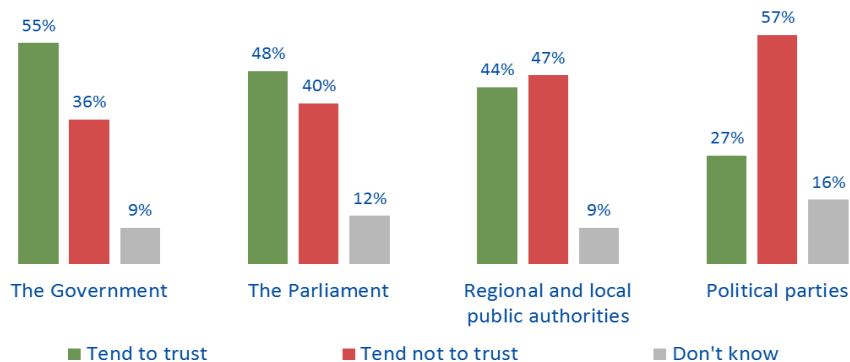
Note: Row percentages may not total 100 due to rounding. Percentages refer to those who watch Russian TV channels.

Again, the most relevant difference was found in terms of age, as the younger dwellers tend to favour entertainment programmes, while the older audience is more likely to mention news and current affairs programmes (49%) than entertainment (15%). The male audience tends to be more interested in news (45%) than the female one (30%).

3.5. Country Evaluation and Future Expectations

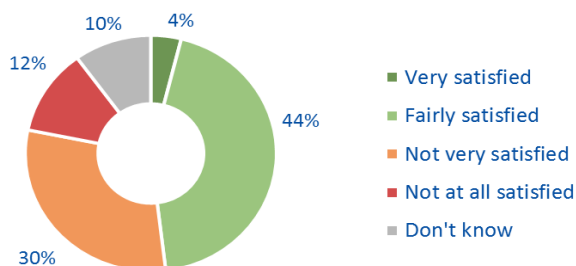
Overall Belarusians do not share a great trust in national, regional and local institutions: 55% trust the Government, 48% the Parliament and 44% regional and local public authorities. Trust in political parties is even lower, as almost 57% of the population distrust them, while 16% has no opinion in this regard.

Q4.1 - Please tell us which is your level of trust for following institutions?



The respondents who are most likely to use Internet as a source of information also tend to distrust public and political institutions, i.e. people living in medium-size settlements, men, those under 55 and inhabitants of the north-centre regions. Conversely, trust is more widespread among people who tend to rely on public TV as the main source of information, such as people living in small settlements, women, the over 55s, the unemployed/inactive, and especially people living in eastern regions.

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



Politically, Belarusians were almost equally split between those who felt fairly (44%) and very (4%) satisfied by the way democracy was functioning in Belarus and those who had a quite negative (30%) or very negative (12%) view. It should also be noted that 10% of the population did not have an opinion on the issue.

Again women (51%), over 55 (53%) and, especially, people living in eastern areas (66%) expressed the most positive perception.

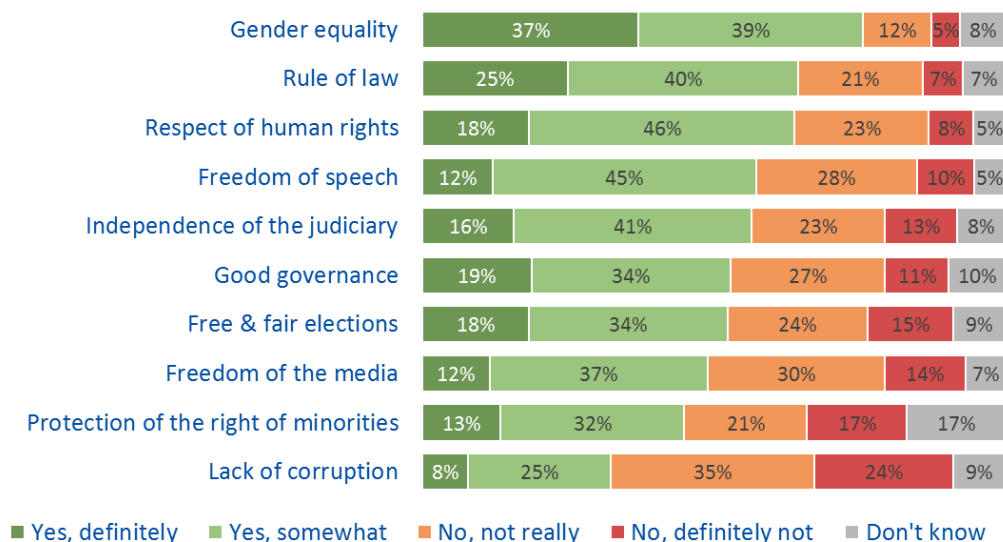
TABLE 18. Satisfaction with democracy

Q4.3 - On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in your country?					
		Satisfied	Not satisfied	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	50%	39%	11%	100%
	Between 20,000 - 150,000 inhabitants	57%	36%	6%	100%
	Equal or more than 150,000 inhabitants	43%	46%	11%	100%
GENDER	Male	44%	47%	9%	100%
	Female	51%	38%	11%	100%
AGE	15 - 34 years	46%	45%	9%	100%
	35 - 54 years	46%	46%	9%	100%
	55 years and over	53%	35%	12%	100%
EDUCATION LEVEL ⁸	Low level	49%	38%	12%	100%
	High level	47%	44%	9%	100%
EMPLOYMENT STATUS	Employed	47%	47%	6%	100%
	Unemployed /non active	51%	35%	15%	100%
GEOGRAPHIC AREA	East	66%	30%	4%	100%
	North-Centre	42%	48%	10%	100%
	West	41%	42%	17%	100%
TOTAL		48%	42%	10%	100%

Note: Row percentages may not total 100 due to rounding.

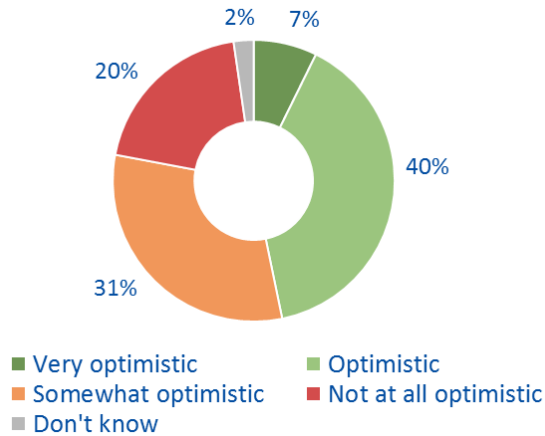
The most widely acknowledged elements of democracy that apply to Belarus were gender equality (76%), rule of law (65%) and respect of human rights (64%). On the other hand, the lack of corruption and freedom of the media were deemed as problematic elements by 59% and 44% of the population respectively.

Q4.4 - To what extent do you think that the following elements apply in your country?

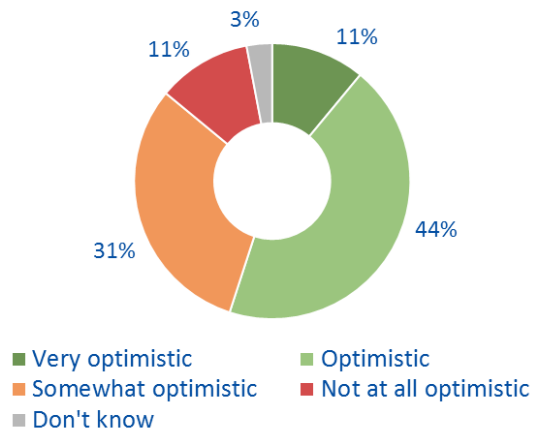


Overall, Belarusians are not particularly optimistic and roughly 47% of them feel confident in their country's future as compared to a 51% share of pessimists. When asked about their personal future, however, Belarusian respondents feel slightly more confident, and positive beliefs (55%) outweigh negative expectations (42%).

Q4.5 - How optimistic are you about the future of your country?



Q4.6 - How optimistic are you about your personal future?



Levels of optimism vary greatly among different geographical areas. Optimism is greatest in eastern areas (64%), whereas inhabitants living in the North-Centre and in the West are more pessimistic and their share (roughly 57-58%) outweighs the share of optimists by 15 and 21 percentage points respectively.

As already outlined, people are more likely to be optimistic than pessimistic about their personal expectations for the future: 55% versus 42%. There is a clear generational split on the question: those aged 15 to 34 are more optimistic than those 55 and over (61% versus 48%). Northern-central and western inhabitants are again the more pessimistic groups in Belarus.

Asked about the most pressing problems facing your country, one third of Belarusians spontaneously mentioned lack of employment opportunities (33%) and economy (31%), followed by low salaries (27%) and low standards of living (10%).

TABLE 19. Optimism Regarding Belarus' Future

Q4.5 - How optimistic are you about the future of your country?					
		Optimistic	Pessimistic	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	46%	50%	4%	100%
	Between 20,000 - 150,000 inhabitants	53%	46%	1%	100%
	Equal or more than 150,000 inhabitants	44%	54%	2%	100%
GENDER	Male	46%	52%	2%	100%
	Female	47%	50%	3%	100%
AGE	15 - 34 years	47%	51%	2%	100%
	35 - 54 years	44%	53%	3%	100%
	55 years and over	48%	50%	2%	100%
EDUCATION LEVEL ⁸	Low level	49%	49%	2%	100%
	High level	46%	52%	2%	100%
EMPLOYMENT STATUS	Employed	45%	53%	2%	100%
	Unemployed /non active	49%	49%	2%	100%
GEOGRAPHIC AREA	East	64%	34%	2%	100%
	North-Centre	42%	57%	1%	100%
	West	37%	58%	5%	100%
TOTAL		47%	51%	2%	100%

Note: Row percentages may not total 100 due to rounding.

TABLE 20. Optimism Regarding Personal Future

Q4.6 - How optimistic are you about your personal future?					
		Optimistic	Pessimistic	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	54%	44%	2%	100%
	Between 20,000 - 150,000 inhabitants	60%	38%	2%	100%
	Equal or more than 150,000 inhabitants	53%	43%	3%	100%
GENDER	Male	56%	42%	2%	100%
	Female	54%	43%	4%	100%
AGE	15 - 34 years	61%	36%	3%	100%
	35 - 54 years	56%	43%	2%	100%
	55 years and over	48%	48%	4%	100%
EDUCATION LEVEL ⁸	Low level	62%	36%	2%	100%
	High level	53%	44%	3%	100%
EMPLOYMENT STATUS	Employed	56%	42%	2%	100%
	Unemployed /non active	53%	43%	4%	100%
GEOGRAPHIC AREA	East	77%	22%	1%	100%
	North-Centre	47%	51%	2%	100%
	West	46%	48%	5%	100%
TOTAL		55%	42%	3%	100%

Note: Row percentages may not total 100 due to rounding.

Annex 1

Table 21: Auxiliary information

Calibration Variables	
SETTLEMENT SIZE	Less than 20,000 inhabitants
	Between 20,000 - 150,000 inhabitants
	Equal or more than 150,000 inhabitants
GENDER	Male
	Female
AGE	15 - 34 years
	35 - 54 years
	55 years and over
EMPLOYMENT STATUS	Employed
	Unemployed /non active
GEOGRAPHIC AREA	East
	North-Centre
	West

Table 22: Concatenation of the calibration variables

Variable 1	Variable 2	Variable 3	No. constraints
Geographical area	Gender	Age group	18
Geographical area	City size		9
Geographical area	Employment status		6

Table 23: Distribution of target population by geographic area and settlements size. Year 2015

Geographic Area	Settlement size	Population
East	Less than 20,000 inhabitants	748,606
	Between 20,000 - 150,000 inhabitants	406,929
	Equal or more than 150,000 inhabitants	934,389
North-Centre	Less than 20,000 inhabitants	1,157,139
	Between 20,000 - 150,000 inhabitants	735,711
	Equal or more than 150,000 inhabitants	1,953,957
West	Less than 20,000 inhabitants	861,382
	Between 20,000 - 150,000 inhabitants	437,451
	Equal or more than 150,000 inhabitants	726,635
Total	Less than 20,000 inhabitants	2,767,127
	Between 20,000 - 150,000 inhabitants	1,580,091
	Equal or more than 150,000 inhabitants	3,614,981
Total Population		7,962,199

Source: National Statistical Committee of the Republic of Belarus

Table 24: Distribution of target population by geographic area, age and gender. Year 2015

Geographic Area	Age	Gender	Population
East	15 - 34 years	Male	345,237
		Female	319,677
	35 - 54 years	Male	346,357
		Female	378,032
	55 years and over	Male	265,524
		Female	435,097
North-Centre	15 - 34 years	Male	664,402
		Female	654,576
	35 - 54 years	Male	609,350
		Female	668,944
	55 years and over	Male	468,533
		Female	781,002
West	15 - 34 years	Male	326,375
		Female	306,662
	35 - 54 years	Male	344,024
		Female	366,353
	55 years and over	Male	258,385
		Female	423,669
Total	15 - 34 years	Male	1,336,014
		Female	1,280,915
	35 - 54 years	Male	1,299,731
		Female	1,413,329
	55 years and over	Male	992,442
		Female	1,639,768
Total Population			7,962,199

Source: National Statistical Committee of the Republic of Belarus

Table 25: Distribution of target population by geographic area and employment status. Year 2015

Geographic Area	Employment status	Population
East	Employed	1,119,300
	Unemployed/Inactive	970,624
North-Centre	Employed	2,312,900
	Unemployed/Inactive	1,533,907
West	Employed	1,113,400
	Unemployed/Inactive	912,068
Total	Employed	4,545,600
	Unemployed/Inactive	3,416,599
Total Population -		7,962,199

Source: National Statistical Committee of the Republic of Belarus



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