

August 2023



Country Opinion Surveys

FY 2023 Djibouti Country Opinion Survey: Pulse Report

ECR Business Intelligence Team



WORLD BANK GROUP

Acknowledgements

The Djibouti Country Opinion Survey is part of the County Opinion Survey Program series of the World Bank Group. This report was prepared by the Business Intelligence (BI) team, led by José De Buerba (Senior External Affairs Officer) and Svetlana Markova (Senior External Affairs Officer). Yulia Danilina, Jessica Cameron, Nan Lin, and Sofya Gubaydullina oversaw the design, reporting, and analysis. Noreen Wambui and Irina Popova provided data support.

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Objectives

This survey was designed to assist the World Bank Group (WBG) in gaining a better understanding of how stakeholders in Djibouti perceive the WBG. The survey explored the following questions:

1. What opinion do key stakeholders have of the WBG when it comes to its effectiveness, relevance, alignment with Djibouti's development priorities, and other key indicators? Are opinions improving or declining?
2. What areas of development are perceived to be the most important? Have the priorities changed over the past five years?
3. How the WBG is perceived as a development partner? Are opinions improving or declining?
4. What key topics the WBG communicates around do stakeholders recall? Is there a relationship between message recall and views of the WBG's work?



Overall Context

Familiarity with the World Bank

Year comparison: Respondents in this year's Country Survey reported similar levels of familiarity with the World Bank Group as in FY18:

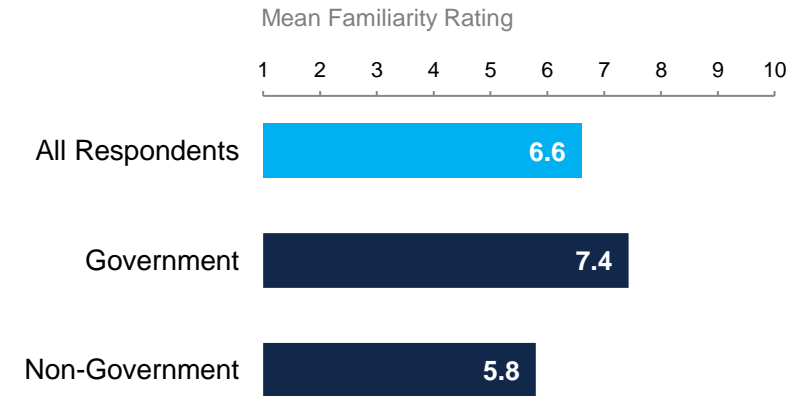
Mean familiarity: FY23 = **6.6**;
FY18 = **6.3**.

Collaboration: Respondents who indicated that they collaborated with the WBG in FY23 reported significantly higher levels of familiarity with the institution's work:

Mean familiarity: WBG collaborators = **7.5**
Non-WBG collaborators = **5.4**

Stakeholders: Respondents from the Government reported significantly higher levels of familiarity with the WBG in FY23.

Mean familiarity: Government respondents = **7.4**
Non-Government respondents = **5.8**



Note:

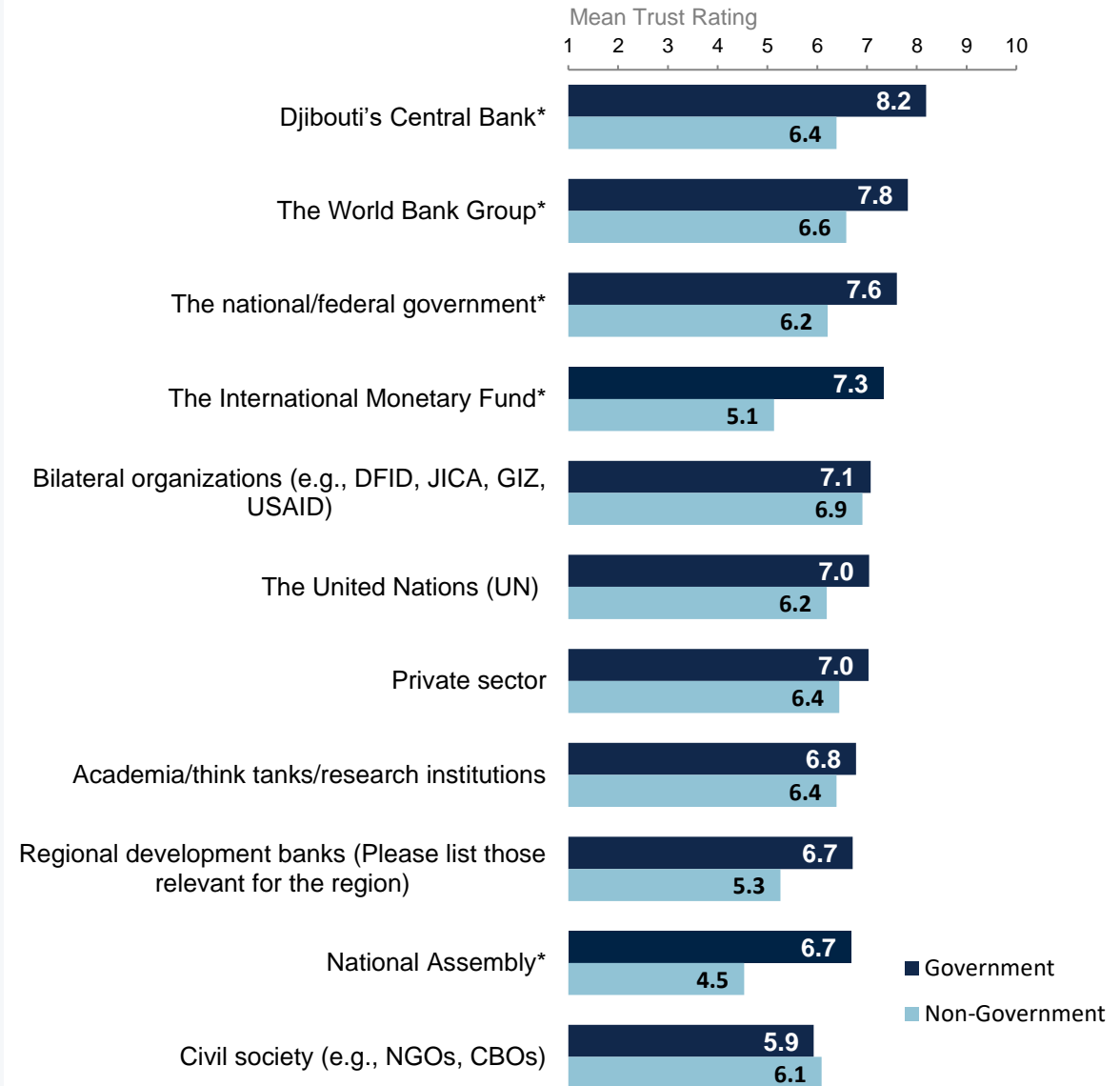
Government includes: Office of the President / Prime Minister / Minister; the National Assembly; Government Institution; and Local Government;

Non-Government includes: Bilateral / Multilateral Agency; Civil Society Organization; Private Sector; Academia/Research Institute/Think Tank; and Media.

Trust in Institutions

The most trusted institutions in Djibouti were Djibouti's Central Bank (overall mean rating = 7.3) and the World Bank Group (overall mean rating = 7.2).

The National Assembly, regional development banks, and civil society were the least trusted institutions among respondents (overall mean ratings = 5.5, 5.9, and 6.0, respectively).



*significantly different between Government and Non-Government respondents



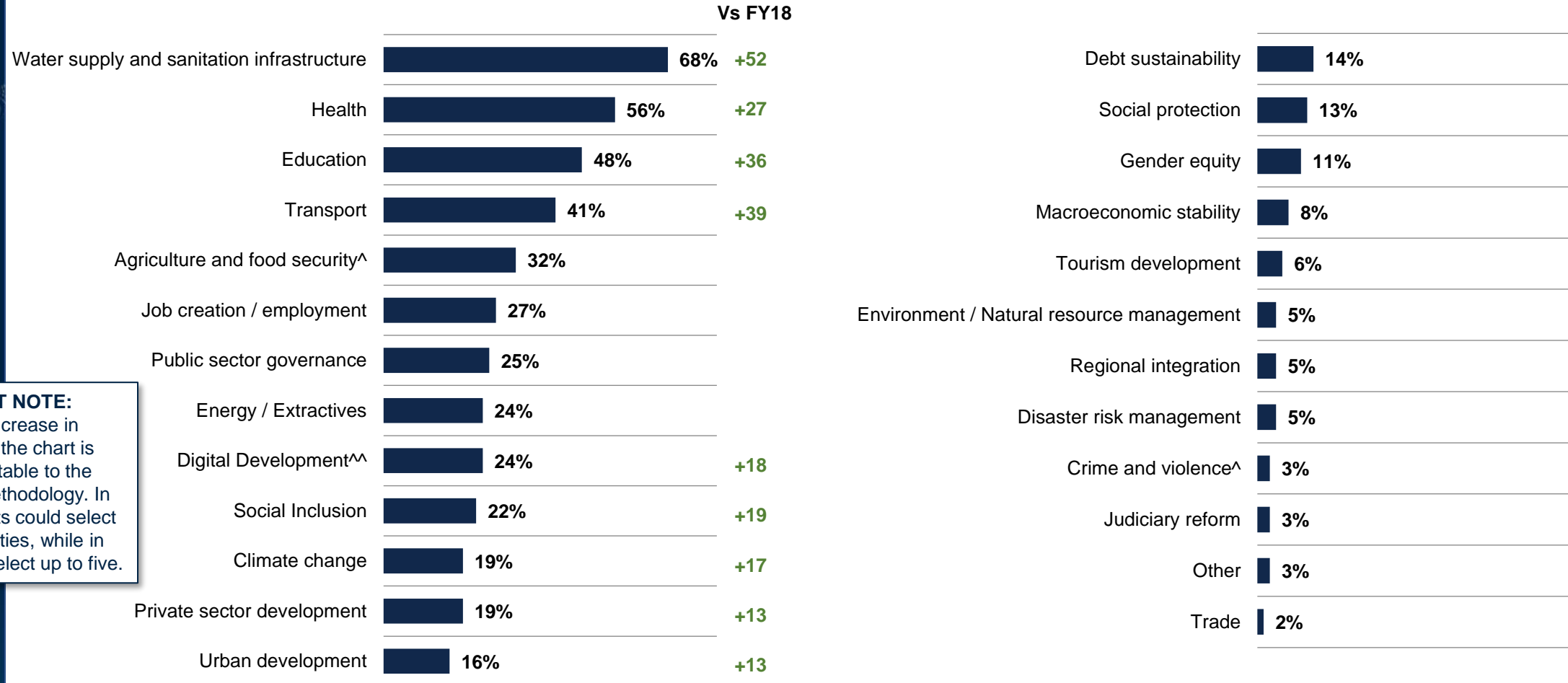
To what extent do you trust each of the following groups to do what is right?
Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)



World Bank Group's Support in Development Areas

Development Priorities for the WBG

Water supply and sanitation infrastructure, health, education, and transport were the top areas in FY23 where stakeholders would like the WBG to focus its resources. All four significantly increased in priority since FY18, with Water supply and sanitation infrastructure having more than four times the percentage of respondents choosing it compared to FY18.



IMPORTANT NOTE:

The overall increase in percentages in the chart is partially attributable to the change in the methodology. In FY18, respondents could select up to three priorities, while in FY23 they could select up to five.



FY23: Which areas should the WBG prioritize in its work in Djibouti to have the most impact on development results in the country? (Choose no more than 5) (N=63)

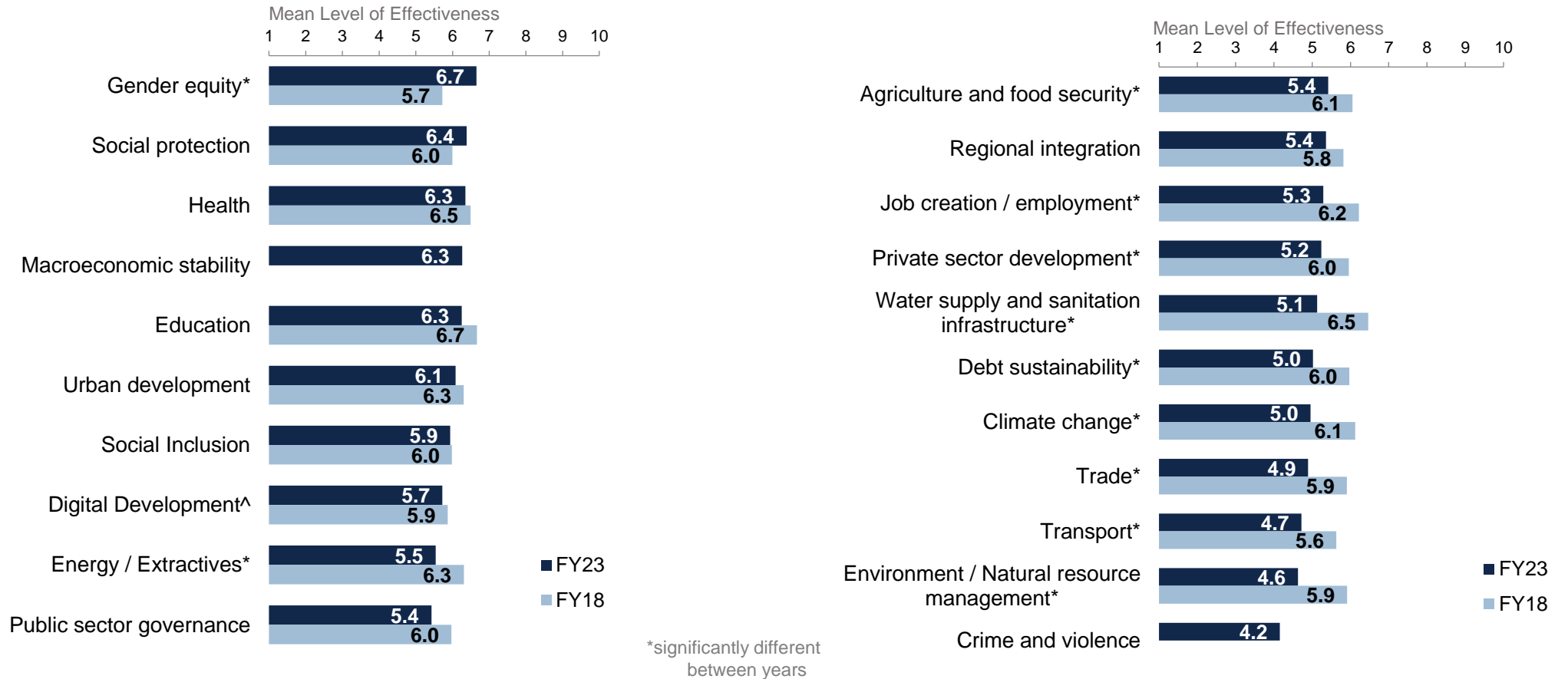
FY18: In which sectors do you believe the WBG should focus most of its resources (financial and knowledge services) in Djibouti? (Choose no more than 3) (N=198)

[^]Compared to the mean of "Food security" and "Agriculture and rural development" asked in FY18.

^{^^}Compared to "Information and communications technology" asked in FY18.

Effectiveness of WBG Support in Sectoral Areas

The WBG's work in **gender equity** received the highest ratings of effectiveness in Djibouti, improving significantly compared to FY18. However, ratings of the WBG's effectiveness in several sectoral areas were significantly lower in FY23 compared to FY18, including the WBG's work in **water supply and sanitation infrastructure, transport, job creation, and energy/extractives** which were among the top 10 development priorities for Djibouti.



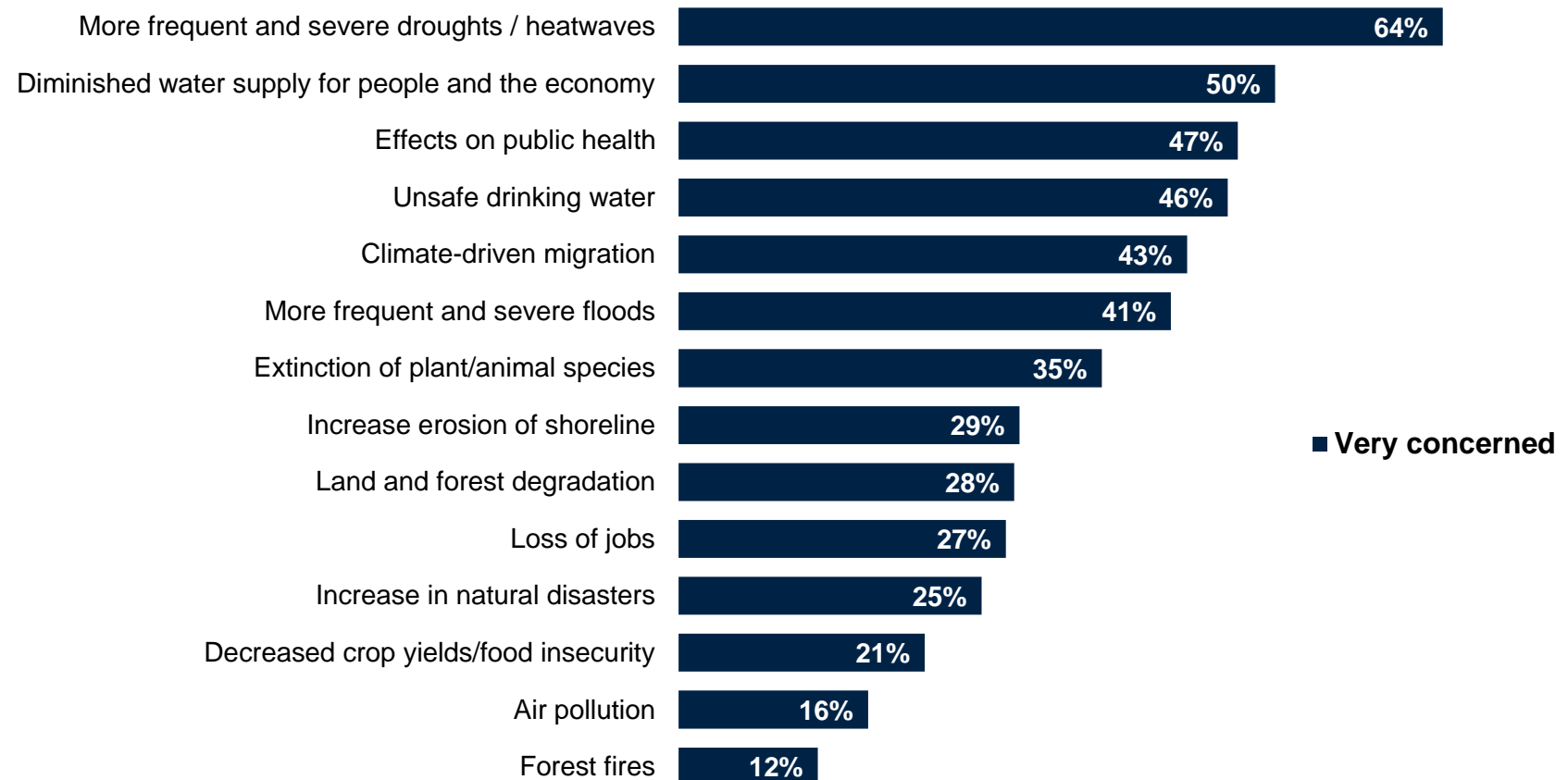
How EFFECTIVE do you believe the World Bank Group is in terms of the work it does in the following areas of development in Djibouti?

(If you have NO exposure to/experience in working in any of the sectors listed below, please respond "Don't know"),

Scale: 1-10 (1: Not effective at all – 10: Very effective) ^Digital Development was compared to Information and communications technology in FY18

More Frequent and Severe Droughts/Heatwaves is a Top Climate Change Concern

Nearly 2 out of 3 respondents were very concerned about **more frequent and severe droughts / heatwaves** (64%) when it comes to the potential impacts of climate change in Djibouti. About half of respondents were also very concerned about **diminished water supply for people and the economy, public health, and unsafe drinking water**.

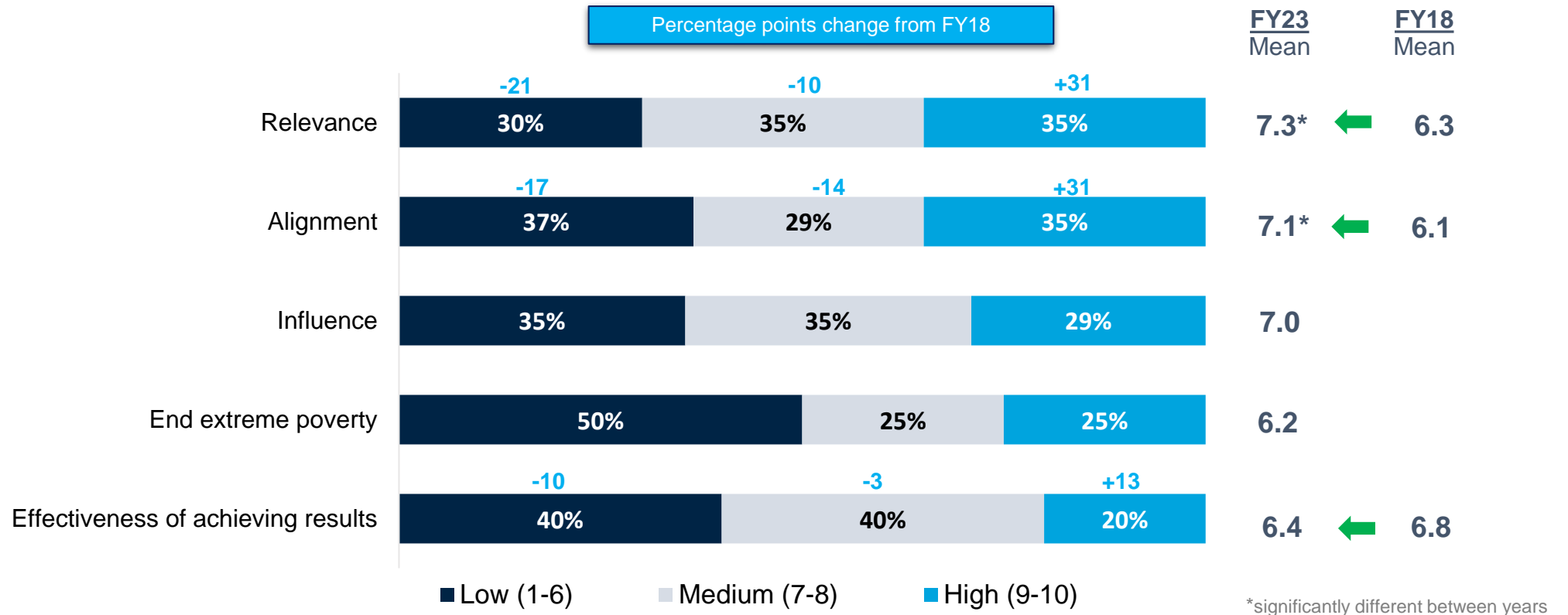




Overall Attitudes toward the World Bank Group

Key Performance Indicators

In FY23, respondents gave significantly higher ratings for the WBG's **relevance** to the development in Djibouti compared to FY18. Although it did not reach statistical significance, more than a third of respondents gave high ratings (9 or 10) for the WBG's alignment with their development priorities, a noteworthy improvement compared to FY18.



The World Bank Group currently plays a relevant role in development in Djibouti. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

The World Bank Group's work is well aligned with what I consider the development priorities for Djibouti. Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

To what extent does the World Bank Group influence the development agenda in Djibouti? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

The World Bank Group's work helps end extreme poverty in Djibouti. (1: Strongly disagree – 10: Strongly agree)

How effective has the World Bank Group been in achieving development results in Djibouti? 1-10 (1: Not effective at all– 10: Very effective);

^In FY23, Effectiveness was compared with the mean score of the two questions asked in FY18:

Overall, please rate your impression of the World Bank Group's effectiveness in Djibouti. Scale: 1-10 (1: Not effective at all– 10: Very effective) and

To what extent does the World Bank Group's work help to achieve development results in Djibouti? Scale: 1-10 (1: To no degree at all– 10: To a very significant degree)

Overall Ratings for Indicator Questions

Year comparison: Respondents in this year's Country Survey reported similar aggregated mean ratings for the indicator questions as in FY18:

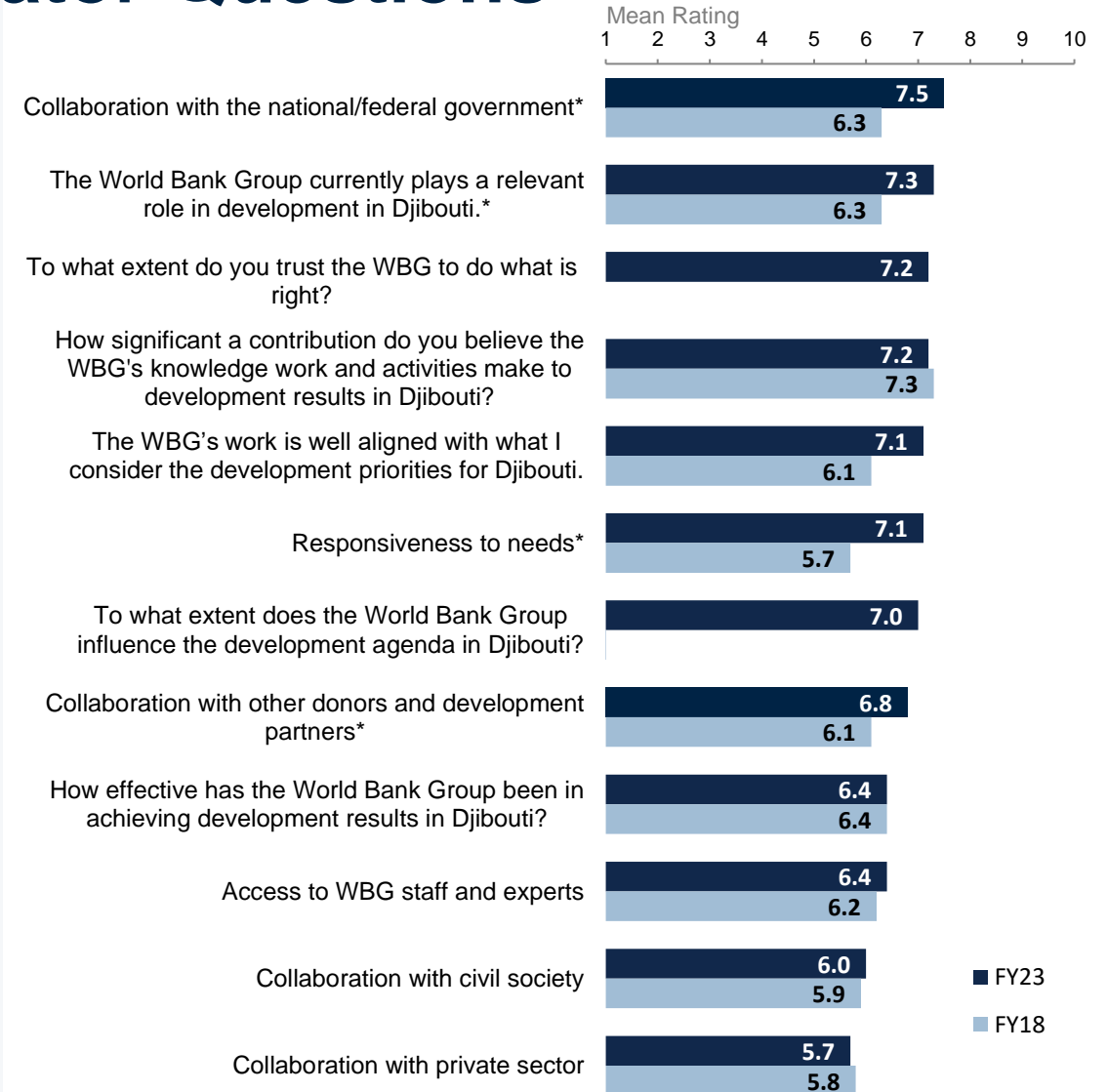
Mean overall ratings: FY23 = **6.7**;
FY18 = **6.3**.

Collaboration: Respondents who collaborated with the WBG had significantly higher mean ratings for the twelve indicator questions asked in the FY23 survey compared to respondents who did not collaborate with the WBG. Aggregated mean rating across all:

Collaborate with WBG mean = **7.4**;

Do not collaborate mean = **5.5**.

Stakeholders: Government respondents reported significantly higher ratings for the WBG's effectiveness (mean = 7.4), relevance (mean = 8.0), and alignment with development priorities (mean = 7.8) compared to non-government respondents (means = 5.5, 6.6, and 6.4, respectively).



*significantly different between years



World Bank Group's Work and Engagement on the Ground

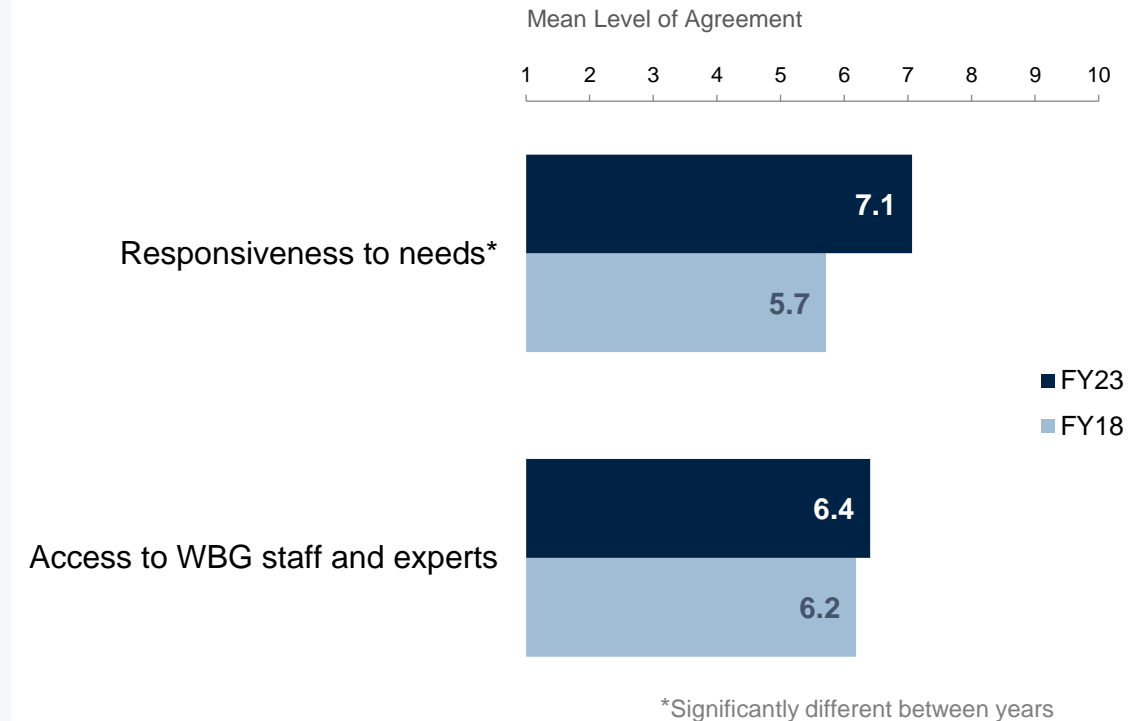
The WBG's Accessibility and Responsiveness

Perception of **responsiveness to needs** significantly improved compared to FY18.

When examining only those respondents who collaborate with the WBG, perceptions still improved, and the perception of responsiveness to needs increased statistically significant:

Mean responsiveness: FY23 = **7.8**;
FY18 = **5.5**.

Mean accessibility: FY23 = **7.1**;
FY18 = **6.2**.

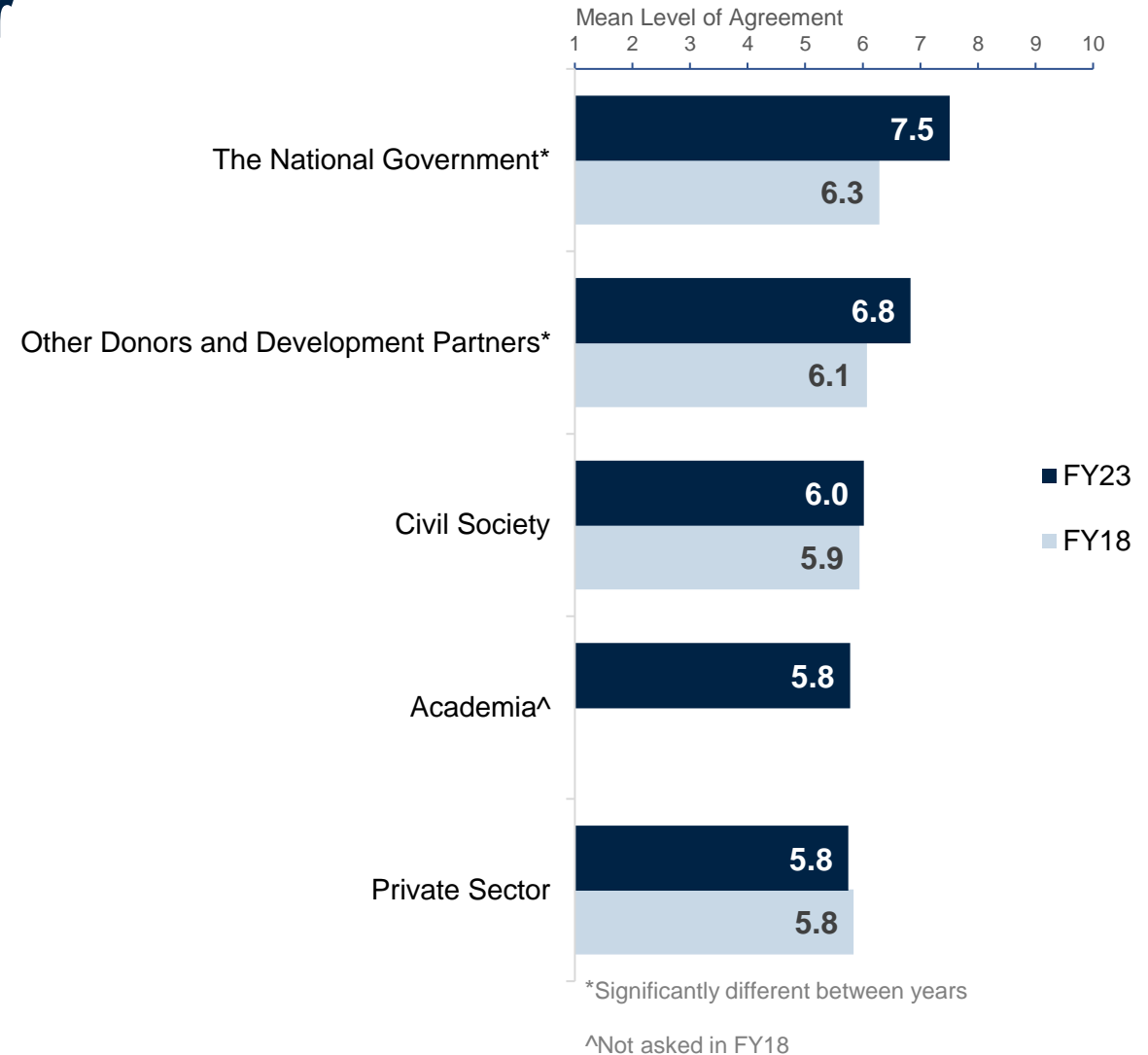


WBG as a Development Partner and Collaborator

Respondents gave the highest mean ratings for the WBG's collaboration with the **national government**, closely followed by **other donors and development partners**.

In addition, perceptions of the WBG's collaboration with the government and its collaboration with other donors and development partners significantly improved compared to FY18.

When examining only those respondents who collaborate with the WBG, perceptions of the WBG's collaboration with the national government and other donors still improved significantly (FY23 mean = 8.2 and 7.5, respectively; FY18 mean = 6.2 and 6.1, respectively). Ratings for the WBG's collaboration with civil society and the private sector trended in the same direction but did not reach statistical significance.





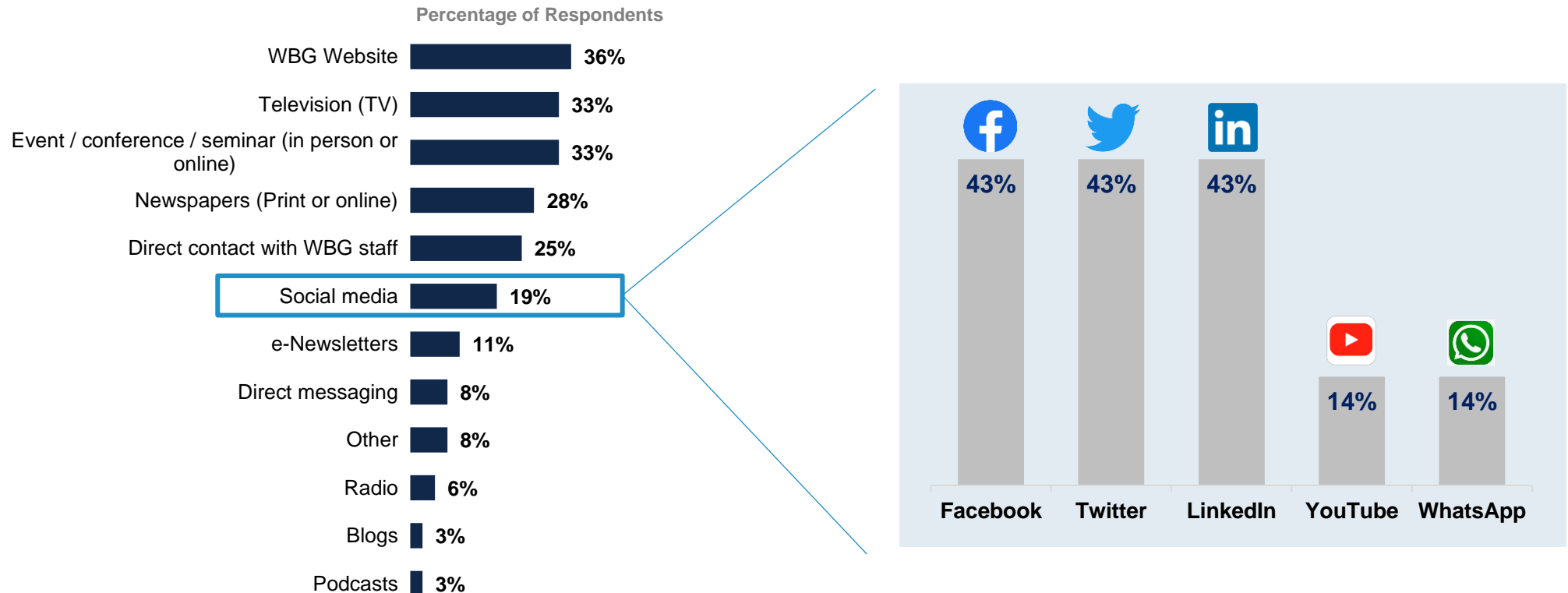
Communications and Outreach

Recent Engagement with the WBG

57% of respondents recalled hearing or seeing something about the WBG in the last 30 days. Those who collaborate with the WBG were significantly more likely to recall hearing or seeing something (70%) than those who don't collaborate (38%).

Over a third of respondents recalled visiting the **WBG Website** or recalled receiving information about the WBG from **television** or at **events/conferences/seminars**.

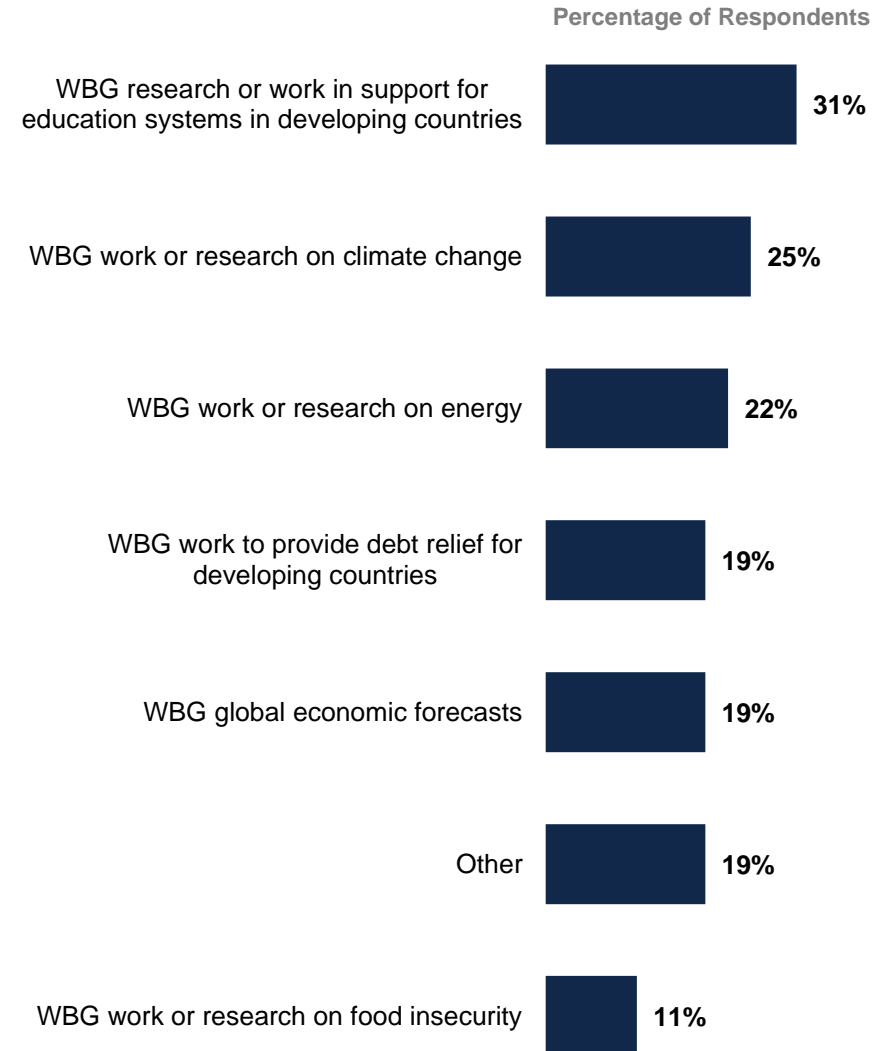
About 2 of 10 respondents reported seeing information on **social media**, most often using **Facebook**, **Twitter**, and **LinkedIn**.



Do you recall seeing or hearing anything about the WBG in the last 30 days? (N=63)
 Where do you recall seeing or hearing this information? (Check all that apply) (N=36)
 What social media platforms do you recall seeing this information on? (Check all that apply) (N=7)

Topics Recalled

Of those respondents who recalled seeing or hearing something about the WBG in the last 30 days, approximately 3 in 10 recalled seeing/hearing about **WBG research or work in support of education systems in developing countries** (31%). A quarter of respondents recalled **WBG work or research on climate change** (25%).



Message Recall and Perceptions of WBG Work

Agreement that the WBG **provides support to improve access and quality of education in developing countries** was highest across all respondents (mean = 7.3).

Those respondents who recalled seeing or hearing something about the WBG in the last 30 days tended to have higher levels of agreement on key messages regarding the WBG's work, significantly so for messages about the WBG's work on **food crisis, energy, climate, and debt solutions**.



*Significant difference between groups

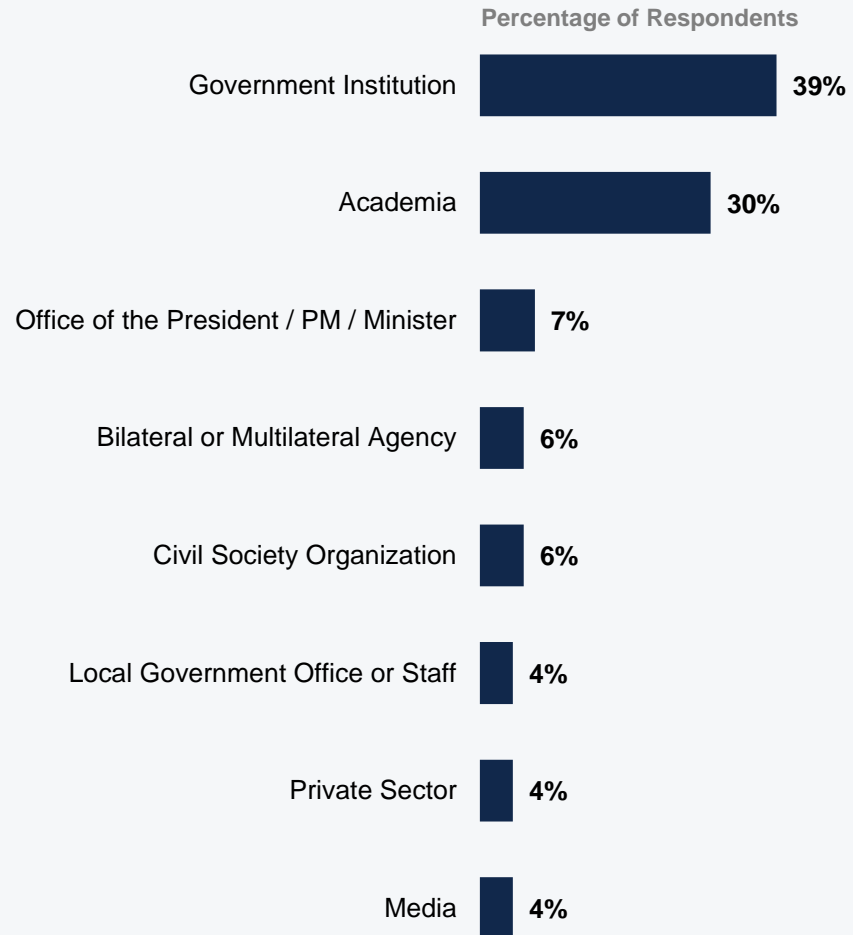


Do you recall seeing or hearing anything about the WBG in the last 30 days? (N = 63)
To what extent do you agree with the following statements: Scale: 1-10 (1: To no degree at all – 10: To a very significant degree) (N ~ 50)

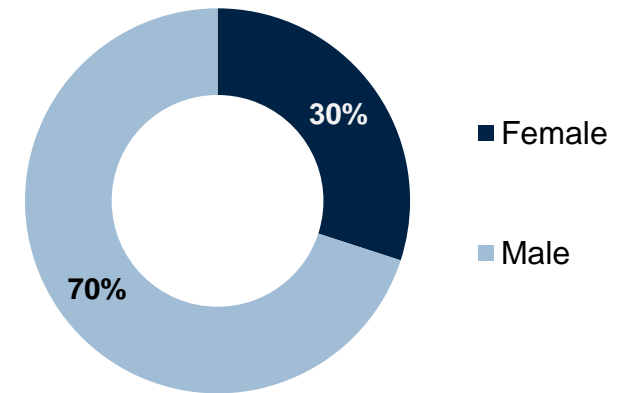
Sample Demographics

Respondent Profile: Affiliation, Gender

Current Affiliation



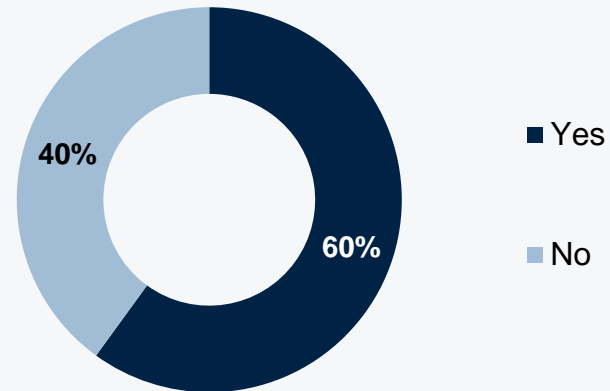
Gender



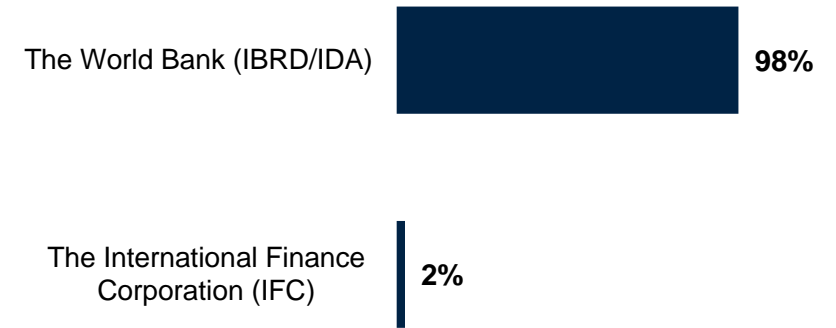
Which of the following best describes your current affiliation? (Select only 1 response) (N=70)
What's your gender? (N=70)

Respondent Profile: Collaboration with the WBG

Collaboration with the WBG



Collaboration Institution



Currently, do you professionally collaborate/work with the World Bank Group (IBRD, IFC, MIGA, ICSID) in your country? (N=70)
Which of the following agencies of the World Bank Group do you primarily collaborate/work with in Djibouti? (Select only 1 response) (N=42)



Methodology

Methodology

From March 2023 to April 2023, a total of **212** stakeholders of the WBG in Djibouti were invited to provide their opinions on the WBG's work in the country by participating in a Country Opinion Survey (COS). Participants were drawn from the Office of the President, Prime Minister, or Minister; government institutions; local governments; bilateral / multilateral agencies; private sector; civil society; academia, research institutes, and think tanks, and the media.

A total of 70 stakeholders participated in the survey (33% response rate). Respondents completed the questionnaire via an online platform.

Every country that engages in the COS must include specific indicator questions; several of them are aggregated for the World Bank Group's annual Corporate Scorecard (please refer to the [Indicator questions](#) section of this report).

Statistical Analysis

Scale bucketing:

When mentioning **Low**, **Medium**, and **High** in the scales throughout this report: 1-6 is low; 7-8 is medium; and 9-10 is high.

Statistical significance:

Key statistically significant findings are denoted with an asterisk (*) throughout the report or discussed in the descriptions of the charts. Significance is measured at $p\text{-value} < .05$

Comparison of FY18 and FY23

The results of this year's Country Survey were compared to those of the Country Survey conducted in FY18 (with a response rate of 68%, N=203).

Comparing responses across Country Surveys reflects changes in attitudes over time, as well as changes in respondent samples and changes to the survey instrument itself. To reduce the influence of the latter factor, only those questions with similar response scales/options are analyzed.

The distribution of the stakeholder groups in the final samples for the FY18 and FY23 Country Surveys are listed in the table on the right.

Additionally, this year, the COS project utilized the Pulse Survey format, which is a shorter version conducted entirely online by the COS team. The list of respondents was identified and provided solely by the country team, which indicates a shift in the stakeholder composition compared to FY18. In the previous survey, at least 20% of the respondents were provided by a local fielding agency.

These differences in the stakeholder composition between the two years should be taken into consideration when interpreting the results of the past-year comparison analyses.

Percentage of Respondents	FY 2018	FY 2023
High-level government office: Office of the President, Prime Minister, Minister, Parliamentarian*	12%	7%
Government institutions: Employee of a Ministry / Ministerial department / Project implementation unit / Independent government institution (e.g., Central bank, regulatory or oversight agency) / Judiciary / State-owned enterprise	27%	39%
Local government	3%	4%
Bilateral/multilateral agency: embassy, development organization, development bank, UN agency	6%	6%
Civil Society Organization: NGO/ community-based organization, private foundation, faith-based group, professional/trade association, and youth group	20%	6%
Private Sector: private company, financial sector organization, private banks	16%	4%
Academia/Research Institute/Think Tank	12%	30%
Media	3%	4%
Other	1%	0%
Total Number of Respondents	200	70

* No stakeholders from the Office of a Parliamentarian were invited In FY2023

Indicator Questions

A1_3. To what extent do you trust the World Bank Group to do what is right? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

A2. How effective has the World Bank Group been in achieving development results in Djibouti?

A3. The World Bank Group currently plays a relevant role in development in Djibouti, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A4. The World Bank Group's work is aligned with what I consider the development priorities for Djibouti, Scale: 1-10 (1: Strongly disagree – 10: Strongly agree)

A6. To what extent does the World Bank Group influence the development agenda in Djibouti? Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

A7. How significant a contribution do you believe the World Bank Group's knowledge work and activities make to development results in your country?
Scale: 1-10 (1: Not significant at all – 10: Very significant)

To what extent is the World Bank Group an effective development partner in Djibouti, in terms of each of the following? – Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

B1. Responsiveness to needs, **B2.** Access to WBG staff and experts,

To what extent is the WBG an effective development partner in Djibouti, in terms of collaborating with the following groups: – Scale: 1-10 (1: To no degree at all – 10: To a very significant degree)

B3. Collaboration with the national government

B4. Collaboration with the private sector

B5. Collaboration with civil society

B6. Collaboration with other donor and development partners

Note: Corporate Scorecard questions are highlighted in **RED**