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

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

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act

*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 six Eastern Partnership countries (Armenia, Azerbaijan, Moldova, 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 the 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 the European policies and their impacts 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 **Moldova**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Moldova
- 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 capacity of different sources of information in general and in relation to the EU.

¹ A similar report is being produced for each EaP country as well as a macro-area report that will provide 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 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 the 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. Exceeding interviews were distributed proportionally to 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 walk principle.

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population (parameters of interest) 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 general category of model-assisted estimators was built (Deville and Särndal 1992)⁵. 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

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) Centre (Dubasari, Glodeni, Nisporeni, Telenesti, Criuleni, Calarasi, Straseni, Ungheni, Orhei)
2) North (Soldanesti, Donduseni, Rezina, Ocnita, Riscani, Briceni, Edinet, Drochia, Floresti, Falesti, Singerei, Soroca, Balti); 3) West (Hrodna and Brést Regions) and 3) South (Basarabeasca, Taraclia, Leova, Cimislia, Cantemir, Stefan Voda, Anenii Noi, Causeni, Ialoveni, Hincesti, Cahul, Gagauzia).

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

⁵ 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.

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 measure⁶, 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 reported in Annex 1. The input data for the calibration procedure came from the national official statistics on population of each country. The known population totals used in the calibration procedure are also reported in Annex 1.

⁶ The logarithmic distance was applied.

3. Survey Findings

3.1 Executive Summary

General Perceptions about the EU

- For Moldovan citizens, the European Union mostly conjures up a fairly positive or neutral image: every second Moldovan (52%) feels positive about the Union (18% - very positive; 34% - fairly positive), while 3 out of 10 Moldovans (30%) express a neutral opinion. Only a small minority of Moldovans had a fairly negative (9%) or very negative (8%) image of the EU. Awareness of the EU is absolute in Moldova – 100% of the population declared that they have heard of the EU.
- Living conditions and a high per capita income in the EU are the leading factor for a **positive** evaluation – about a third of those who had a positive image of the EU (31%) consider the living conditions and income per capita to be particularly attractive in the EU. Other key factors mentioned are also linked with economic benefits, such as opportunities (work places, open borders, free trade opportunities) in the EU (22%), a developed economy and economic prosperity (18%), and the timely distribution of pensions and salaries (14%).
- Among the main reasons for taking a **neutral** stance towards the EU, Moldovans name a lack of order/bad policies (14%), the existence of NATO (11%) and a lack of trust (9%).
- Moldovans who criticise the EU explain their reasoning by: personal dislike towards the Union (19%), the EU imposes opinions/conditions/norms on people (9%), loans from the EU will lead to a crisis (8%), economic/political policy is wrong (8%), there is too much democracy in the EU (6%).

Values Associated with the EU

- The majority of associations related to the EU are very positive. The most frequently mentioned value, cited by more than a third of the Moldovans, was economic development and prosperity (35%). Other spontaneously mentioned concepts were the rule of law (15%), democracy (13%), freedom of speech (13%), peace, security and stability (11%) and architecture/culture/traditions (8%). Negative associations were recorded in only 4% of cases.
- Moldovans most strongly linked the EU with human rights (82%) and economic prosperity (81%). Among other top values were individual freedom (79%), democracy (78%), freedom of speech (77%), freedom of religion (77%) and rule of law (77%).

EU Relations with Moldova

- The majority of Moldovan citizens (67%) acknowledge that the EU's relations with Moldova are good (5% very good, 62% - fairly good). About a quarter of Moldovans think the relations are fairly bad (20%)

or very bad (4%). Only a very small share of citizens (3%) is not aware that Moldova has relations with the EU, and 5% does not know whether the relations are good or bad.

Awareness and Effectiveness of EU Financial Support

- Moldovans are well aware of the EU's financial support to their country: eight out of ten Moldovans (83%) declare that the EU provides financial support to Moldova through its cooperation programmes. Only one out of ten (10%) claimed that the EU does not provide any financial support and a similarly low share (8%) refrained from giving a definitive answer.
- Moldovans aware of the EU's financial support for cooperation programmes were split between those who found it effective (45%), and those who seemed more sceptical (52%).
- Regarding the current benefits for the country stemming from the EU's involvement, 56% of the population talked about improved infrastructure, 54% cited an increase in tourism, while half of the population named access to more products and services as well as better educational opportunities. Moldovans were more critical in assessing the EU's contribution to fighting corruption (73% considers the EU's support not at all or not very effective), better enforcement of the law (67%) and improving the quality of the justice system (65%).
- Moldovans felt that the European Union should play a greater role in economic processes, business development and investment issues (29%). Other areas of greater support would preferably be: justice and prosecution (21%), education and science (19%), health and medicine (18%), rural sector and agriculture development (15%) and anti-corruption initiatives (14%).
- When asked to compare support provided by different International donors with the support provided by the EU, few Moldovans believed that the support provided by the other countries/institutions cited exceeded that of the EU (9% for the United States, 5% the UN, 17% Russian Federation, 16% International Monetary Fund).

Trust Towards Organisations

- The EU is the most trusted international institution among Moldovans – nearly three out of five Moldovans trust the European Union (59%), while the United Nations (40%), the Eurasian Union (34%) and NATO (26%) are all trusted to a lesser degree.

Internet & Social Media Usage

- Access to the Internet is quite high in Moldova, with 75% having a computer connected to the Internet at home. Internet connection at work is not as common – only about one out of five Moldovans (21%) have a computer connected to the Internet at work.
- Odnoklassniki is the most popular social network in Moldova, with three out of five Moldovans (58%) using it. Facebook is the second most widespread social network, with a lower share of 40%. About a fifth of the population (18%) use Vkontakte. Altogether the popularity of the other main social networks – i.e. Instagram, Twitter and LinkedIn – does not exceed 9% (9%, 7% and 3%, respectively).

- Television is still the leading medium for keeping the population up to date: 70% of Moldovans watch the news on a daily basis. Internet usage is also quite high in the country – 66% of Moldovans use the Internet at least 2 or 3 times a week (and 53% almost every day).

Sources of Information for Political News

- Asked about the most important sources of information for national news, Moldovans indicate private TV channels (60%), the Internet (46%) and public TV channels (32%). Private and public radio stations are mentioned by 18% of the population and Online Social Media by 13%, as well as Public and Private printed press.
- The survey also asked which media sources are the most trusted among Moldovans. Again, results showed that private TV channels (35%), the Internet (27%) and public TV channels (16%) share the leading positions.
- More than eight out of ten (85%) Moldovans believe that TV forms public opinion (very much - 44%, fairly much - 41%). Other influential media channels are Internet websites (65%) and social media (67%). The least effective medium in terms of forming public opinion is perceived to be the printed press (55%) and radio (55%).
- Four out of five residents of Moldova (83%) use local media as a source of information. Foreign media in Russian is also popular in the country (51%). International media is read by a fair amount of Moldovans – more than a quarter (28%) of the population claims to read news in a language other than their native language or Russian.

Sources of Information on the EU

- More than half of the Moldovan population (56%) looks for EU-related information quite frequently – one out of five Moldovans very frequently (4%) or frequently (16%), while 36% not very frequently.
- About a third of the population interested in the EU looks for news about social and political issues (31%), while about a quarter (23%) looks for economy and development-related information. The Internet is the preferred source of information on the EU among 77% of this population. Private and public channels also attract a good share (26% and 22%, respectively). Twenty-one per cent of the population looks for information on the EU on social media. An absolute majority of the EU-curious population found the information to be accessible, user-friendly and comprehensive (98%-99% evaluations are at least fairly good). The majority of them (70%) use their native language to search for information on the EU. Russian is the second most popular choice for about a fifth (19%) of the EU-curious population. EU-related news is searched for in English by only 10% of the segment.
- A large majority of Moldovans (80%) had seen or heard information about the EU in the last three months. TV was found to be the leading source of EU-related information (85%) followed by social media (27%), conversations with friends (21%), radio (20%) and websites (17%). Newspapers (10%), brochures (4%), posters (4%) and events (8%) were not that effective, as they were only recalled by one out of ten Moldovans.

- Usage of EU information websites⁷ is quite low in Moldova. The Facebook profile of the European Union is the most visited EU website (12% of the population). EU institutions' websites and EU Projects' websites are each visited by one out of ten Moldovans. The rest of the EU pages are only seen by 3%-6% of the target audience.
- A majority of Moldova's population (69%) felt that the national media were presenting the European Union very positively (15%) or fairly positively (54%). Only 4% feel that the EU is presented in a negative way. One out of five Moldovans rated the presentation of the EU as neutral (20%).
- When asked about the influence on their own perception, only 8% feel that what they read or watch significantly influences their perception of the EU, while 45% admits it has a 'fair' degree of influence.
- Finally, a large share of the population (60%) is not satisfied with the level of information provided by their government on EU-related topics.

Russian Media

- Russian TV channels, newspapers and news portals are very popular among Moldovans. One third of the population (33%) stated that they always follow Russian media while more than a quarter (28%) stated that they often do.
- According to the survey results, ORT (72%) tops the list of Russian channels watched in Moldova, followed by RTR (61%), and NTV (53%).

Country Evaluation and Future Expectations

- Overall, Moldovans share a fairly low trust in national, regional and local institutions: public authorities are the most trusted institution by more than a third of Moldovans (35%). Government (14%), Parliament (12%), and political parties (12%) share an equally low level of trust among the population.
- Nearly nine out of ten Moldovans (87%) are dissatisfied with the current level of democracy in their country. Almost none are very satisfied (1%) and just one out of ten Moldovans (11%) is fairly satisfied.
- The most widely acknowledged elements of democracy that apply to Moldova were gender equality (56%), protection of the rights of minorities (41%) and freedom of speech (38%). On the other hand, Moldovans feel that more work is needed with regard to corruption (92% low evaluation), good governance (86%), rule of law (82%) and independence of the judiciary (80%).
- Overall, Moldovans are not particularly optimistic about the future of their country, with roughly 44% of them feeling confident in their country's future compared to a 54% share of pessimists. When asked about their personal future, however, Moldovans feel slightly more confident, and positive beliefs (67%) strongly outweigh negative expectations (32%).

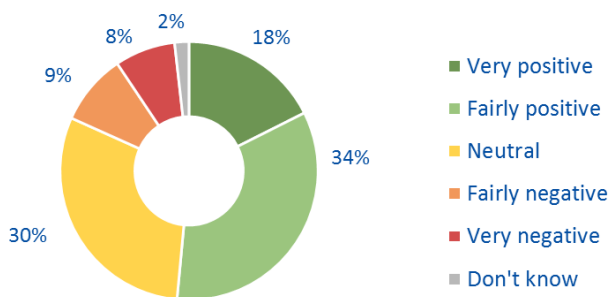
⁷ EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

3.2. Perceptions about the European Union

3.2.1 General Perceptions about the EU

The European Union mostly conjures up a fairly positive or neutral image: every second Moldovan (52%) feels positive about the Union (18% - very positive; 34% - fairly positive), while three out of 10 Moldovans (30%) express a neutral opinion. Only a minority of Moldovans had a fairly negative (9%) or very negative (8%) image of the EU. Awareness of the EU is absolute in the country – 100% of respondents declared that they had heard of the EU.

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



The positive perception about the EU is slightly higher among the most educated Moldovans (57%) and those who are employed (57%).

Even though the majority of the population living in all settlement types tends to have a positive image of the EU, residents living in smaller settlements display the highest positive indicator (55% versus 43-44% in bigger settlements). Neutrality was found most commonly (40%) among large settlements with more than 150,000 residents.

The living conditions and high per capita income in the EU are the leading factors behind a **positive** evaluation – about a third of those who had a positive image of the EU (31%) consider the living conditions and per capita income to be particularly attractive in the EU. Other key factors mentioned are also linked with economic benefits, such as opportunities (work places, open borders, free trade opportunities) in the EU (22%), developed economy and economic prosperity (18%), and the timely distribution of pensions and salaries (14%). Moldovans also mentioned spontaneously factors related to socio-cultural aspects, such as the EU being a cultural centre (11%), the rule of law (11%), human rights being respected (8%), high level of education/intelligence (7%) and acceptable mind-set/mentality (6%).

Among the main reasons for taking a **neutral** stance towards the EU, Moldovans name: lack of order/bad policies (14%), the existence of NATO (11%) and the lack of trust (9%). Additionally, one out of three neutrally disposed Moldovans explain their attitude by: the EU having both positive and negative aspects (8%), the lack of their personal approval to become part of the EU (7%) and the lack of confidence that their country will ever become a part of the EU (7%).

The research shows that **negative** evaluations are consistently lower than positive and neutral ones in all sub-groups. Nevertheless, most residents negatively assessing the EU have a personal dislike towards the Union (19%), and that is the spontaneously declared reasoning behind their evaluation. Additionally, Moldovans who expressed unfavourable opinions about the EU tended to feel that the EU imposes opinions/conditions/norms

on people (9%), that loans from the EU will lead to a crisis (8%), economic/political policy is wrong (8%), and there is too much democracy in the EU (6%).

TABLE 1. Perception of 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	55%	28%	15%	2%	100%
	Between 20,000 - 150,000 inhabitants	43%	28%	25%	3%	100%
	Equal or more than 150,000 inhabitants	44%	40%	16%	0%	100%
GENDER	Male	51%	28%	19%	2%	100%
	Female	52%	32%	14%	2%	100%
AGE	15 - 34 years	52%	34%	12%	1%	100%
	35 - 54 years	52%	30%	17%	1%	100%
	55 years and over	50%	25%	22%	3%	100%
EDUCATION LEVEL ⁸	Low level	46%	33%	18%	2%	100%
	High level	57%	28%	14%	1%	100%
EMPLOYMENT STATUS	Employed	57%	28%	15%	0%	100%
	Unemployed /non active	48%	32%	17%	3%	100%
GEOGRAPHIC AREA	Central	53%	32%	14%	1%	100%
	North	48%	27%	22%	3%	100%
	South	52%	31%	15%	2%	100%
TOTAL		52%	30%	17%	2%	100%

Note: Row percentages may not total 100 due to rounding

3.2.2 Values Associated with the EU

This section looks at the values that Moldovans mostly associate with the European Union.

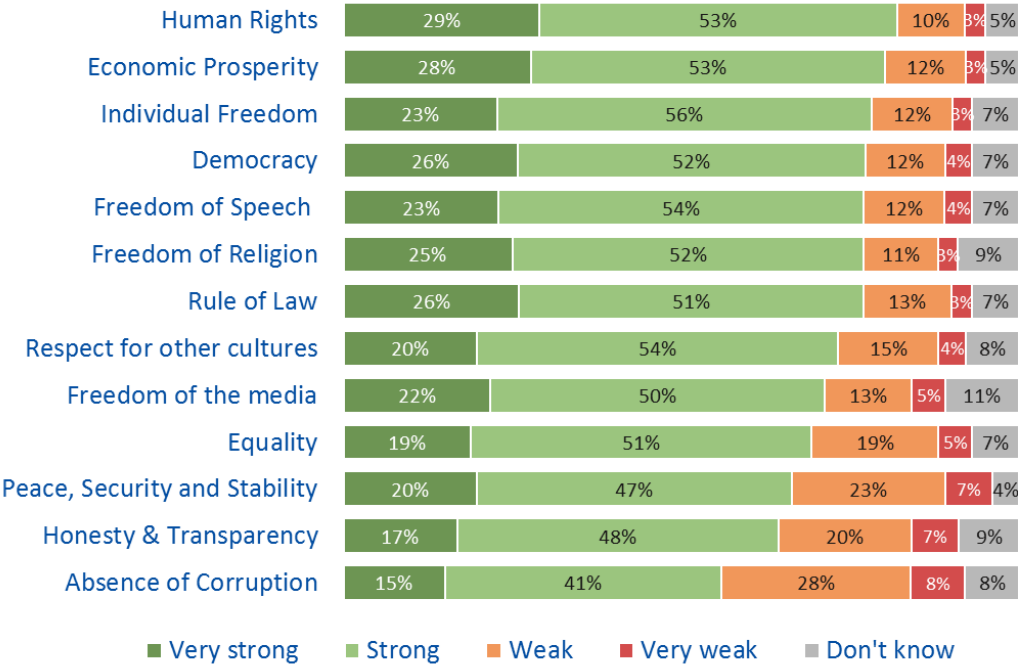
Respondents were asked to name those values spontaneously. The most frequently mentioned value, cited by more than a third of people in Moldova, was economic development and prosperity (35%). Other spontaneously mentioned perceptions were rule of law (15%), democracy (13%), freedom of speech (13%), peace, security and stability (11%) and architecture/culture/traditions (8%). In brief, the majority of associations are positive and touch upon various aspects of the EU, ranging from economics to cultural norms. Negative associations were recorded only in 4% of cases and were related to depravity, perversity, debauchery (same-sex marriages, prostitution, soft drugs) and the perceived inability to make decisions and take actions by the EU.

⁸ Low level: fewer or equal to 11 years of education; High level: more than 11 years of education.

While evaluating the extent to which the European Union represents certain values, Moldovans most strongly linked the EU with human rights (82%) and economic prosperity (81%). Among other top values were Individual freedom (79%), democracy (78%), freedom of speech (77%), freedom of religion (77%) and rule of law (77%).

On the other hand, the absence of corruption, honesty and transparency as well as peace, security and stability were regarded as less typical of the EU (lower level of strong association, respectively 56%, 65% and 67% of Moldovans).

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



Respondents were also asked to name the three most important values for themselves. The top answers were human rights (45%) peace, security and stability (40%), economic prosperity (37%), and absence of corruption (35%). In addition, every fifth Moldovan spontaneously indicated Human Rights (20%) and Peace, Security and Stability (20%) as their primary values. Other personal values mentioned by at least 10% of Moldovans included: the rule of law (21%), freedom of speech (18%), equality (15%), democracy (15%), honesty and transparency (13%) and individual freedom (11%). Freedom of the media (5%), respect for other cultures (8%) and freedom of religion (9%) seem to be consistently evaluated with less importance than other values.

Two values that are a top priority for Moldovans are also strongly associated with the EU, namely human rights and economic prosperity - while the other two – namely peace, security & stability and absence of corruption – are less associated with the EU.

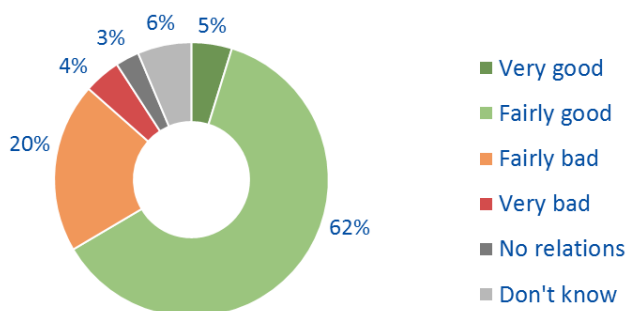
TABLE 2. The Most Important Values in Moldova

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	20%	10%	10%
Human Rights	20%	12%	13%
Absence of corruption	12%	14%	9%
Economic prosperity	11%	12%	14%
Rule of Law	7%	7%	7%
Freedom of speech	6%	12%	0%
Equality	5%	5%	5%
Honesty & Transparency	4%	4%	5%
Democracy	4%	6%	5%
Individual Freedom	3%	4%	4%
Freedom of Religion	3%	3%	3%
Respect for other cultures	2%	3%	3%
Freedom of the media	1%	2%	2%

3.3. EU Relations with Moldova

Two out of three Moldovan citizens (67%) acknowledge that the EU’s relations with Moldova are good (5% very good, 62% - fairly good). About a quarter of Moldovans think the relations are fairly bad (20%) or very bad (4%). Only a very small share of citizens (3%) is not aware that Moldova has relations with the EU, and 6% does not know whether the relations are good or bad.

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



Results showed that residents with higher education perceive relations in a more positive way than those with secondary or lower education (71% and 62% respectively). Furthermore, those who perceived EU-Moldova relations more positively were most often found among residents of smaller settlements (70% compared to nearly 60% of those living in medium and larger cities) and inhabitants of the Centre and South of the

country (68% and 70% respectively, as compared to 61% of northern dwellers).

TABLE 3. The EU's Relations with Moldova

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	70%	20%	10%	100%
	Between 20,000 - 150,000 inhabitants	59%	33%	8%	100%
	Equal or more than 150,000 inhabitants	60%	35%	6%	100%
GENDER	Male	64%	28%	8%	100%
	Female	69%	21%	10%	100%
AGE	15 - 34 years	68%	23%	9%	100%
	35 - 54 years	66%	24%	10%	100%
	55 years and over	65%	26%	9%	100%
EDUCATION LEVEL ⁸	Low level	62%	26%	12%	100%
	High level	71%	22%	6%	100%
EMPLOYMENT STATUS	Employed	68%	23%	9%	100%
	Unemployed /non active	66%	25%	9%	100%
GEOGRAPHIC AREA	Central	68%	24%	9%	100%
	North	61%	28%	11%	100%
	South	70%	22%	9%	100%
TOTAL		67%	24%	9%	100%

Note: Row percentages may not total 100 due to rounding

3.3.1. Awareness and Effectiveness of EU Financial Support

A majority of Moldovans are well aware of the financial support provided by the EU to their country. On average, eight out of ten Moldovans (83%) acknowledge that the EU provides financial support to Moldova through its cooperation programmes. High awareness is displayed across all demographic segments including gender, age, and employment

One out of ten residents (10%) claimed that the EU does not provide any financial support to cooperation programmes in Moldova. A similarly low share (8%) refrained from giving a definitive answer, as they were not sure if the EU supported such programmes at all.

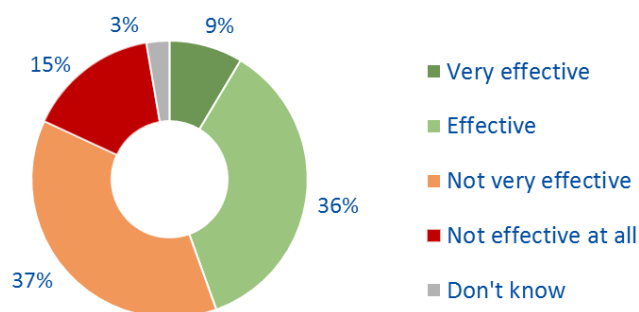
TABLE 4. European Union provides Moldova with financial support for cooperation programmes

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	83%	8%	9%	100%
	Between 20,000 - 150,000 inhabitants	72%	17%	11%	100%
	Equal or more than 150,000 inhabitants	88%	11%	1%	100%
GENDER	Male	83%	10%	7%	100%
	Female	83%	9%	9%	100%
AGE	15 - 34 years	86%	7%	7%	100%
	35 - 54 years	82%	12%	7%	100%
	55 years and over	80%	10%	10%	100%
EDUCATION LEVEL ⁸	Low level	78%	11%	11%	100%
	High level	88%	8%	4%	100%
EMPLOYMENT STATUS	Employed	86%	8%	6%	100%
	Unemployed /non active	81%	10%	9%	100%
GEOGRAPHIC AREA	Central	88%	8%	4%	100%
	North	73%	16%	12%	100%
	South	86%	5%	9%	100%
TOTAL		83%	10%	8%	100%

Note: Row percentages may not total 100 due to rounding

Moldovans aware of the EU's financial support for cooperation programmes were split between those who found it effective (9% very effective and 36% effective), and those who seemed more sceptical (37% not very effective and 15% not effective at all).

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



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

Specifically, residents of large settlements were found to be the least satisfied – roughly seven out of ten took a negative stance and considered that EU support is not effective (while smaller settlement dwellers account for a 46-50% satisfaction rate).

At a geographical level, northern Moldovans (51%) tend on average to be more satisfied than their central and southern counterparts (42% and 43% respectively).

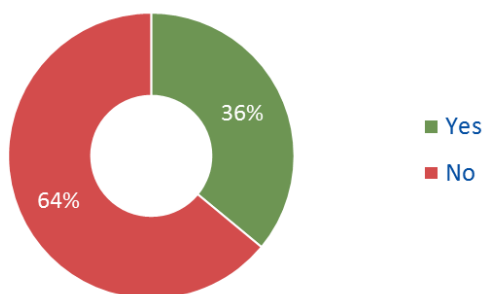
TABLE 5 - Effectiveness of EU support

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	50%	47%	3%	100%
	Between 20,000 - 150,000 inhabitants	46%	53%	1%	100%
	Equal or more than 150,000 inhabitants	27%	72%	1%	100%
GENDER	Male	43%	56%	1%	100%
	Female	45%	50%	4%	100%
AGE	15 - 34 years	47%	50%	3%	100%
	35 - 54 years	42%	57%	1%	100%
	55 years and over	44%	53%	4%	100%
EDUCATION LEVEL ⁸	Low level	46%	51%	4%	100%
	High level	43%	55%	2%	100%
EMPLOYMENT STATUS	Employed	44%	54%	2%	100%
	Unemployed /non active	45%	52%	3%	100%
GEOGRAPHIC AREA	Central	42%	57%	1%	100%
	North	51%	43%	6%	100%
	South	43%	55%	2%	100%
TOTAL		45%	52%	3%	100%

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

Awareness of particular programmes financed by the EU is quite high in Moldova – more than a third (36%) of the population is aware of specific programmes.

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



When asked about which specific programmes they know, the majority (64%) spontaneously recalled the EU's support of infrastructure, mainly roads and water provision. Among other frequently recalled programmes were: educational and cultural programmes (14%), construction and renovation of kindergartens and schools (12%), agricultural programmes and support programmes for farmers (11%), and programmes on health and medicine (10%).

According to the survey findings, only 6% of Moldovans have personally been (or know someone) involved in recent EU-funded projects.

Moldovans were also asked to assess the current benefits for the country stemming from the EU's involvement. 56% of the population talked about improved infrastructure, 54% cited an increase in tourism, while half the population spoke of the access to more products and services, as well as better educational opportunities.

Moldovans were more critical in assessing the EU's contribution to fighting corruption (73% considers the EU's support not at all or not very effective), better law enforcement (67%) and improving the quality of the justice system (65%).

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	14%	40%	26%	11%	10%	100%
Improved infrastructure (streets, sewage, water, etc.)	11%	45%	27%	11%	6%	100%
Access to more products and services	8%	42%	26%	13%	11%	100%
Improved trade	8%	36%	33%	12%	12%	100%
Better education	8%	42%	29%	12%	10%	100%
Greater employment opportunities	6%	27%	40%	20%	7%	100%
Improved quality of health-care system	6%	35%	35%	18%	7%	100%
Improved democracy	4%	32%	35%	21%	9%	100%
Greater economic development	4%	28%	40%	20%	8%	100%
Improved agricultural production	4%	32%	37%	18%	9%	100%
Less corruption	4%	16%	35%	38%	7%	100%
Better law enforcement	3%	21%	37%	30%	8%	100%
Improved quality of the justice system	3%	20%	35%	30%	13%	100%

Note: Row percentages may not total 100 due to rounding

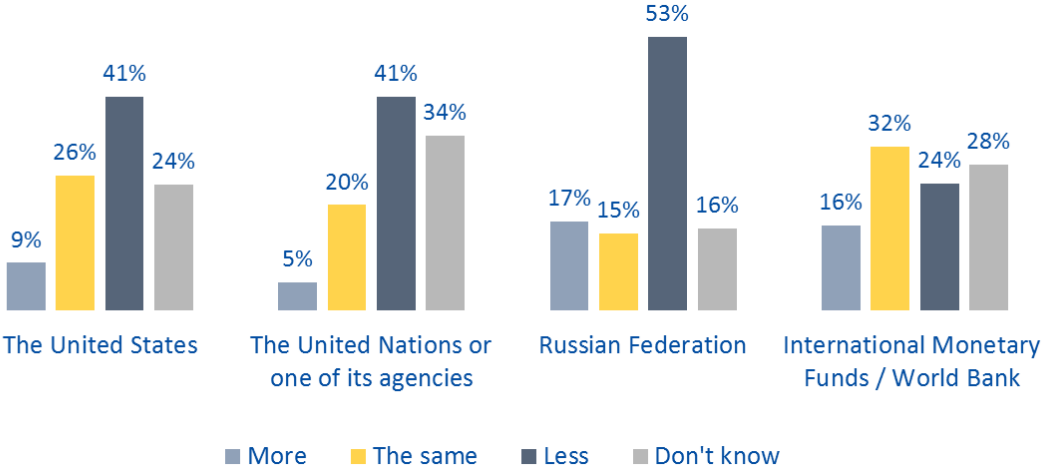
Moldovans felt that the European Union should play a greater role in economic processes, business development and investment issues (29%). Other areas of greater support would preferably be: justice and prosecution (21%), education and science (19%), health and medicine (18%), rural sector and agriculture development (15%) and anti-corruption initiatives (14%).

Respondents were also asked to compare the support provided by different International donors with the support provided by the EU. Again, the level of awareness was quite high, as only a very low share of Moldovans believed the support provided by other countries/institutions exceeded that of the EU (9% for the United States, 5% the UN, 17% the Russian Federation, and 16% for the International Monetary Fund/World Bank). It is important to note that a significant proportion of the population feel that they do not have enough information to evaluate and compare the volume of the support, ranging from 16% (in the case of the Russian Federation) to 34% (UN).

Despite a relatively high positive indicator (17%) for the Russian Federation, every second Moldovan (53%) believes that Russia provides less support to Moldova than the EU. A further 15% claims that Russia and the EU provide equal support.

Two out of five Moldovans (41%) believe the United States provides less support to Moldova than the EU, while a quarter (20%) considers the support to be the same for the US and the EU.

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?



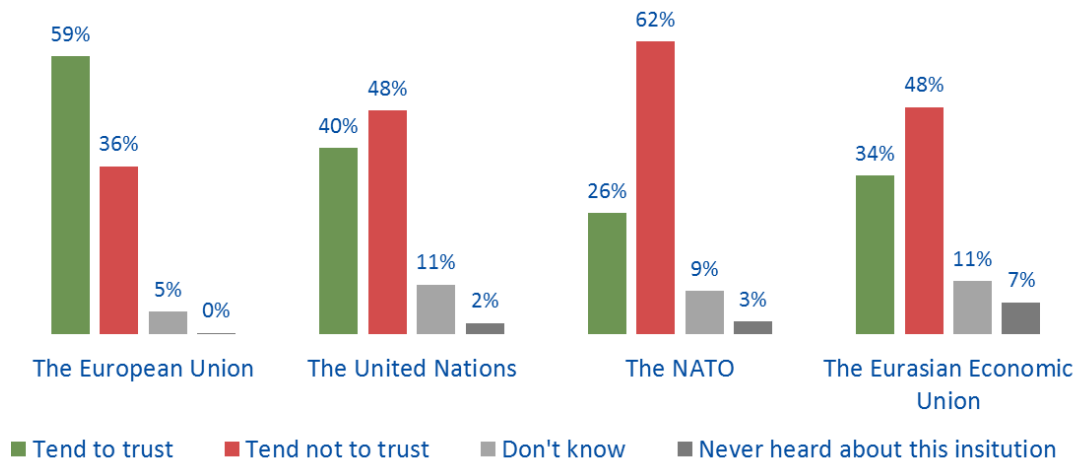
Apparently the UN was the least known donor– more than one third (34%) could not estimate its support, two out of five Moldovans (41%) claim that the UN provides less support to Moldova than the EU, while a fifth (20%) considers the support to be the same for the two institutions.

On the other hand, the IMF has one of the highest profiles and 16% consider that it “provides more support than the EU”. Additionally, about one third (32%) think that the volume of financial support provided by the two institutions is similar, a quarter (24%) considers it smaller, while the rest (28%) refrained from choosing between them.

3.3.3. Trust towards Organisations

The EU is the most trusted international institution among Moldovans – nearly three out of five Moldovans trust the European Union (59%) – while the United Nations (40%), the Eurasian Union (34%) and NATO (26%) all share a lower level of trust.

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



Trust towards the EU is most common among people with higher education (66%), young Moldovans (15-34) (65%), the employed population (64%) and residents of the central part of the country (65%).

The UN is the second most trusted international institution in the country, especially by residents of large settlements (48%) as well as residents of the central part of the country (45%).

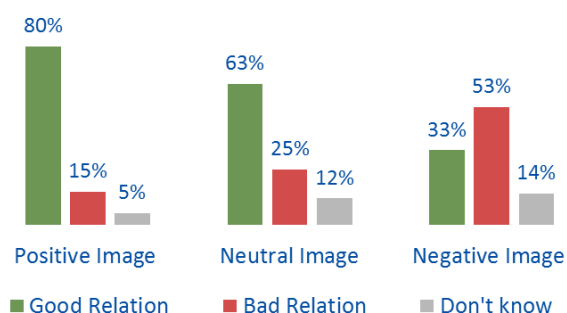
Trust towards NATO is quite low in Moldova, and more or less homogeneously scattered throughout all socio-demographic segments. Interestingly, it has a similar geographic distribution to that of the UN – one third of the population in large settlements (33%) tends to trust NATO, along with residents of central Moldova (33%).

The Eurasian Economic Union is not especially popular among Moldovans, and only a third of the population (34%) tends to trust it. Nevertheless, notable differences are observed at regional level. More specifically, every second Moldovan living in Southern Moldova leans towards trusting the Eurasian Union (48%). The situation is totally different in the north, where only 17% expressed their trust towards the EEU.

Attitudes towards the EU: a snapshot

Moldovans' 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.

Image of EU and EU's Relation with Moldova

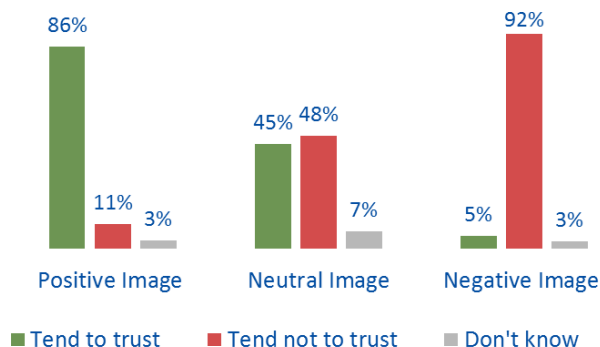


A cross-analysis of Moldovans' image of the EU (positive, neutral and negative) with their perception of the relations between the EU and their country, the awareness of the EU financial provision and their trust in the EU, confirms that those with the most positive image of the EU are also those most likely to have the highest level of trust in the EU (86%), to value positively the relations between the EU and Moldova (80%) and to be more informed about the

support provided by the EU (92%).

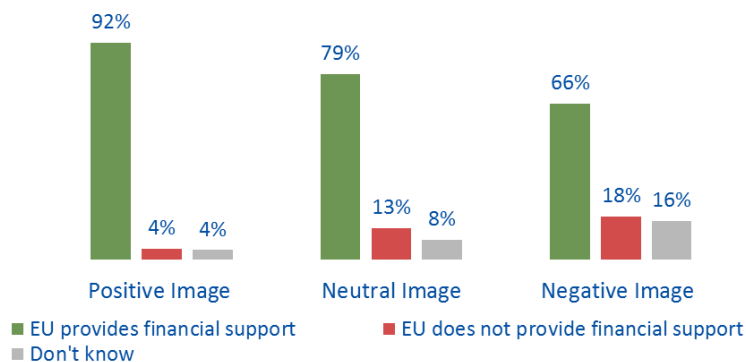
On the other hand those who have a negative image about the EU were more likely to have a consistently bad opinion about the EU's relations with Moldova (53% rated the relationship as "bad" and 33% as "good"), and to have, especially, the lowest levels of trust in the EU. Overall, 92% in this group tended not to trust the EU versus 11% of those who claimed they had a positive image of the EU.

Image of EU and Trust Towards EU



As for those sharing a neutral image, more than half of those belonging to this group deemed positively the EU's relations with Moldova (63%), 45% tended to trust the EU, while a majority (79%) was aware of the financial support provided by the EU.

Image of EU and Financial Support Provision Awareness



3.4 Sources of Information

3.4.1. Internet & Social Media Usage

Access to the Internet is quite high in Moldova, with 75% having a computer connected to the Internet at home. Ownership is very high among the youth (15-34 years old), as well as employed Moldovans (89%). Older generations are least likely to have access to the Internet at home (46%).

Internet connection at work is not as common: only one fifth of residents (21%) have a computer connected to the Internet at work. Furthermore, only one in two of those employed (53%) said they had a computer connected to the Internet at work.

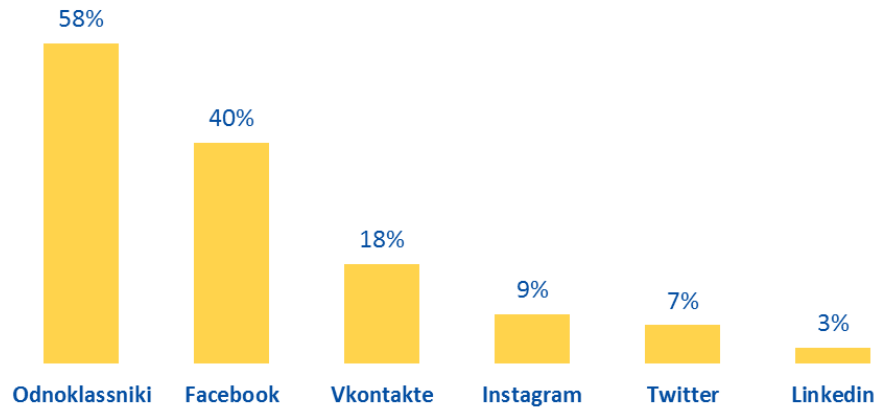
TABLE 7. Percentage of population who have a computer with Internet at home or work

		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	73%	21%
	Between 20,000 - 150,000 inhabitants	72%	18%
	Equal or more than 150,000 inhabitants	85%	21%
GENDER	Male	77%	24%
	Female	73%	18%
AGE	15 - 34 years	90%	20%
	35 - 54 years	82%	31%
	55 years and over	46%	10%
EDUCATION LEVEL ⁸	Low level	70%	11%
	High level	81%	31%
EMPLOYMENT STATUS	Employed	89%	53%
	Unemployed /non active	66%	0%
GEOGRAPHIC AREA	Central	80%	20%
	North	68%	23%
	South	74%	21%
TOTAL		75%	21%

Note: Row percentages may not total 100 due to rounding

Odnoklassniki is the most popular social network in Moldova, with three out of five Moldovans (58%) using it. Facebook is the second most widespread social network, with a lower share of 40%. About a fifth of the population (18%) use Vkontakte. The popularity of the other main social networks – i.e. Instagram, Twitter and LinkedIn – does not exceed 9% (9%, 7% and 3%, respectively).

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



An interesting trend is observed when analysing social media usage in terms of inhabitants' age. Unsurprisingly 15-34 year-olds are the most likely to be users of all social networks, with Odnoklassniki being used the most (78%), followed by Facebook (65%), Vkontakte (33%), Instagram (17%), Twitter (13%) and LinkedIn (5%).

The 55+ age group is the least likely to be a social media user. Larger settlements are more likely to be home to Facebook (50%) and Vkontakte (26%) users, compared to smaller settlements (37% and 15% respectively).

TABLE 8. People with 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	37%	8%	8%	4%	15%	59%
	Between 20,000 - 150,000 inhabitants	45%	7%	9%	1%	21%	62%
	Equal or more than 150,000 inhabitants	50%	5%	9%	4%	26%	55%
GENDER	Male	41%	9%	9%	4%	21%	60%
	Female	40%	6%	8%	3%	16%	57%
AGE	15 - 34 years	65%	13%	17%	5%	33%	78%
	35 - 54 years	31%	5%	5%	3%	12%	61%
	55 years and over	16%	3%	1%	1%	5%	27%
EDUCATION LEVEL ⁸	Low level	31%	7%	7%	1%	17%	56%
	High level	50%	8%	10%	6%	20%	62%
EMPLOYMENT STATUS	Employed	46%	8%	9%	5%	18%	68%
	Unemployed /non active	37%	7%	9%	2%	18%	53%
GEOGRAPHIC AREA	Central	42%	4%	6%	2%	19%	58%
	North	35%	9%	8%	2%	16%	58%
	South	43%	10%	13%	6%	19%	60%
TOTAL		40%	7%	9%	3%	18%	58%

Note: Row percentages may not total 100 due to rounding

Television is the most popular media channel in Moldova: 70% of Moldovans watch the news on a daily basis. Internet usage is also quite high in the country – 66% of Moldovans use the Internet at least two or three times a week (and 53% almost every day).

TABLE 9. Frequency of Media Usage

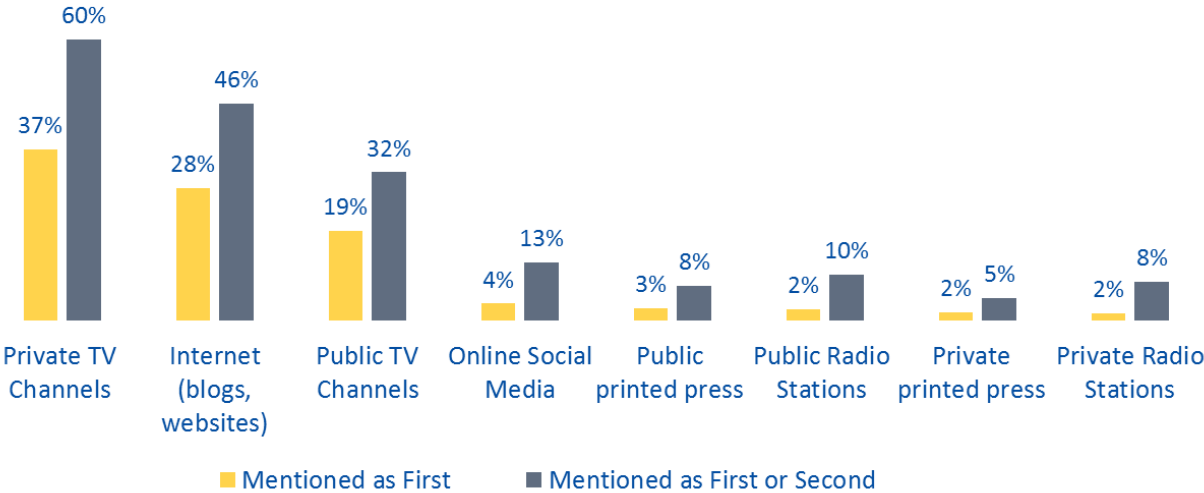
Q3.2 – Could you tell me to what extent you ...?								
	Everyday/ Almost everyday	2-3 times a week	About once a week	2-3 times a month	Less often	Never	No access	Total
Watch television on a TV set	70%	14%	5%	2%	5%	4%	0%	100%
Use the Internet (websites, blogs)	53%	13%	4%	3%	4%	20%	4%	100%
Use online social networks	46%	10%	6%	3%	3%	28%	4%	100%
Listen to the radio	29%	14%	9%	6%	18%	23%	2%	100%
Watch television via the Internet	15%	11%	7%	6%	11%	45%	5%	100%
Read the printed press	7%	11%	13%	12%	17%	38%	1%	100%

Note: Row percentages may not total 100 due to rounding

3.4.2. Sources of Information for Political News

Asked about the two most important sources of information for national news, Moldovans indicate private TV channels (60%), the Internet (46%) and public TV channels (32%). Private and public radio stations are mentioned by 18% of the population and online social media by 13% as well as public and private printed press.

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



The Internet is the best medium for younger citizens: seven out of ten Moldovans aged between 15 and 34 (71%) declared that they mostly get their news online, while only half of them (52%) get it from private TV. Older generations are comfortable watching private TV channels. Three out of five 35-54-year-olds (62%) and 69% of over 55s watch private TV channels.

At a geographical level, northern Moldovans seem the least likely to access the Internet for political news, compared to citizens living in other parts of the country, (36% north, 51% central, 49% south).

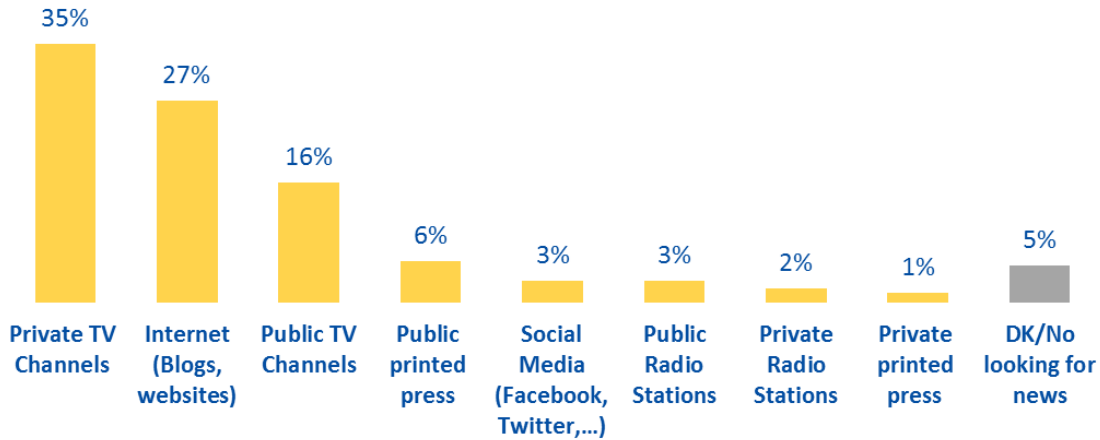
TABLE 10. Source for News on National Political Matters

Q3.3 - Where do you get most of your news on national political matters? Firstly? Secondly?				
<i>Sources of information mentioned as first or second</i>				
		Private TV Channels	Public TV Channels	Internet
SETTLEMENT SIZE	Less than 20,000 inhabitants	61%	30%	45%
	Between 20,000 - 150,000 inhabitants	53%	35%	42%
	Equal or more than 150,000 inhabitants	61%	37%	53%
GENDER	Male	60%	25%	49%
	Female	60%	38%	44%
AGE	15 - 34 years	52%	22%	71%
	35 - 54 years	62%	33%	42%
	55 years and over	69%	44%	16%
EDUCATION LEVEL ⁸	Low level	61%	30%	42%
	High level	60%	33%	51%
EMPLOYMENT STATUS	Employed	61%	30%	48%
	Unemployed /non active	60%	33%	45%
GEOGRAPHIC AREA	Central	61%	32%	51%
	North	56%	35%	36%
	South	63%	27%	49%
TOTAL		60%	32%	46%

Note: Row percentages may not total 100 due to rounding

The survey also asked which media source is the most trusted among Moldovans. Again, results showed that private TV channels (35%), the Internet (27%) and public TV channels (16%) share the leading positions.

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



The most trusted sources of information follow the same trend. Specifically, younger people (43%) choose the Internet as the most trusted source, while older residents (55+) favour private (43%) and public (25%) television; 35-54 year-olds still prefer private TV (40%) to the Internet (24%) and do not trust public TV (16%) as much.

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?							
		Private TV Channels	Public TV Channels	Internet	Other	DK/No looking for news	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	35%	16%	26%	18%	6%	100%
	Between 20,000 - 150,000 inhabitants	30%	23%	30%	12%	5%	100%
	Equal or more than 150,000 inhabitants	38%	14%	33%	13%	2%	100%
GENDER	Male	34%	12%	32%	16%	6%	100%
	Female	36%	20%	23%	16%	5%	100%
AGE	15 - 34 years	25%	10%	43%	14%	7%	100%
	35 - 54 years	40%	16%	24%	18%	4%	100%
	55 years and over	43%	25%	8%	19%	4%	100%
EDUCATION LEVEL ⁸	Low level	34%	17%	27%	16%	6%	100%
	High level	36%	15%	28%	16%	5%	100%
EMPLOYMENT STATUS	Employed	34%	15%	32%	14%	5%	100%
	Unemployed /non active	36%	17%	24%	17%	6%	100%
GEOGRAPHIC AREA	Central	38%	14%	31%	13%	3%	100%
	North	30%	18%	19%	24%	10%	100%
	South	36%	18%	29%	13%	4%	100%
TOTAL		35%	16%	27%	16%	5%	100%

Note: Row percentages may not total 100 due to rounding

The influence of the mass media on public opinion is confirmed by the survey. More than eight out of ten (85%) Moldovans believe that TV forms public opinion (very much - 44%, fairly much - 41%). Other influential media channels are Internet websites (65%) and social media (67%). The least effective media in terms of forming public opinion are perceived to be printed press (45%) and radio (45%).

TABLE 12. Mass Media influence on Public opinion

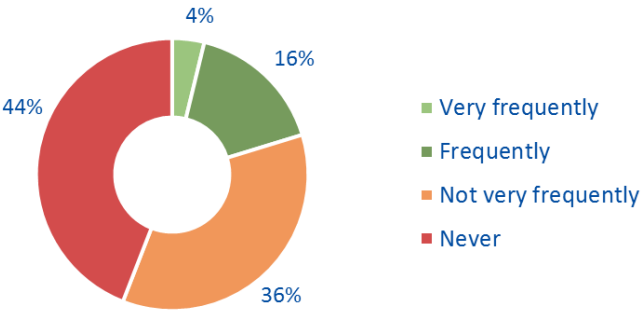
Q3.5 – In your opinion, to what extent does your country’s mass media influence public opinion?						
	Very much	Fairly much	Not very much	Not much at all	Don't know	Total
Television	44%	41%	10%	2%	3%	100%
Websites	26%	39%	19%	3%	14%	100%
Printed press	12%	33%	39%	9%	8%	100%
Radio	15%	40%	30%	8%	7%	100%
Social media	29%	38%	16%	5%	14%	100%

Note: Row percentages may not total 100 due to rounding

Four out of five residents of Moldova (83%) use local media as a source of information. Foreign media in Russian is also popular in the country (51%). International media is read by a fair amount of Moldovans – more than a quarter (28%) of the population claims to read news in a language other than their native language or Russian.

3.4.3. Information Sources for the EU

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



More than half the Moldovan population (56%) occasionally looks for EU-related information – one out of five Moldovans either very frequently (4%) or frequently (16%), and 36% not very frequently.

The research found that about a third of Moldovans who are interested in the EU (i.e. people looking for information on the EU very frequently or frequently), looks up for news about social and political issues (31%), while about a quarter (23%) looks for economy and development-related information. Other frequently mentioned topics

were: general information on EU countries (17%), tourism and leisure (14%) and education/science/technology (13%). Overall, Moldovans were quite satisfied with the level of information gathered: 90% often find the information they are looking for regarding the EU.

The Internet is the preferred resource for information on the EU for 77% of those who frequently look for information. Private and public channels also attract a good share (26% and 22%, respectively). Twenty-one per cent of people look for information on the EU on Social Media.

Moldovans who frequently search for EU-related information were also asked to assess certain characteristics of the information found. The research shows that an absolute majority of the EU-curious population found the information to be accessible, user-friendly and comprehensive (98%-99% evaluations are at least fairly good). The majority of them (70%) use their native language to search for information on the EU. Russian is the second most popular choice for about a fifth (19%) of the EU-curious population. EU-related news is searched for in English by only 10% of the segment.

Furthermore, Moldovans 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 (57%).

A majority of Moldovans (80%) in all groups (percentages varying from 69% to 85%) had seen or heard information about the EU in the last three months. Medium-sized city residents (69%) and those living in the northern areas of the countries have been less exposed to information on the EU than other socio-demographics segments.

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

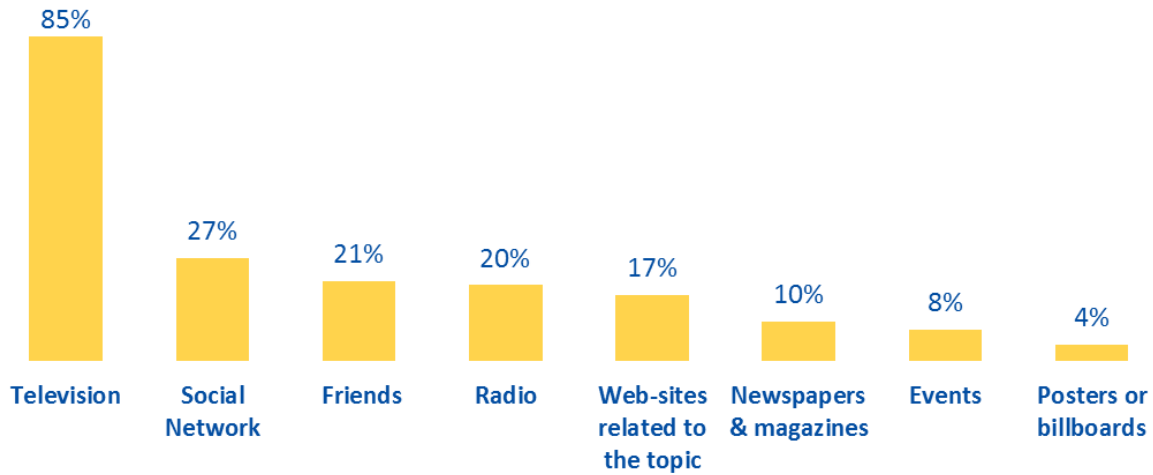
Q3.10 - Have you seen or heard any information about the EU in the last three months?				
		Yes	No	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	80%	20%	100%
	Between 20,000 - 150,000 inhabitants	69%	31%	100%
	Equal or more than 150,000 inhabitants	85%	16%	100%
GENDER	Male	81%	19%	100%
	Female	78%	22%	100%
AGE	15 - 34 years	80%	20%	100%
	35 - 54 years	80%	20%	100%
	55 years and over	79%	21%	100%
EDUCATION LEVEL⁸	Low level	75%	25%	100%
	High level	85%	15%	100%
EMPLOYMENT	Employed	84%	16%	100%
	Unemployed /non active	77%	23%	100%
GEOGRAPHIC AREA	Central	83%	17%	100%
	North	70%	30%	100%
	South	84%	17%	100%
TOTAL		80%	21%	100%

Note: Row percentages may not total 100 due to rounding

TV was found to be the leading source on EU-related information for all groups (85% of those who have heard or seen information about the EU in the last three months), including young people (73%). Social media (27%), conversations with friends (21%), radio (20%) and websites (17%) were also listed among the most cited news sources on the EU. Newspapers (10%), informational brochures (4%), posters (4%) and events (8%) were not that effective, as they were only recalled by one out of ten Moldovans.

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)



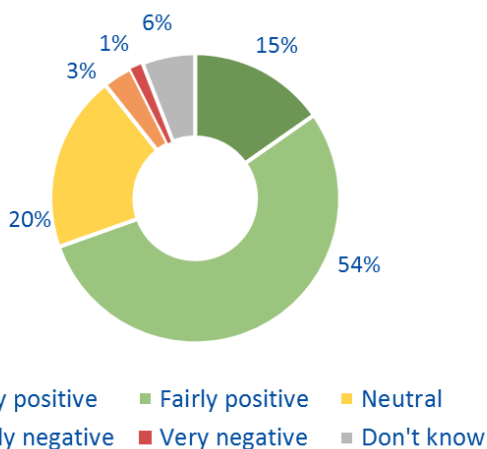
The Usage of EU informational websites⁹ is quite low in Moldova. The Facebook profile of the European Union is the most visited EU website (12% of the population). EU institutions' websites and EU Projects' websites are each visited by one out of ten Moldovans. The rest of the EU pages are only seen by 3%-6% of the target audience.

Respondents were also asked about their topics of interest concerning the EU. Information on economics, politics, work opportunities, and government policies were deemed of interest by one in every ten Moldovans. Other EU-related topics of interest that were cited included: public views on standard of living, culture/art/music, education and joining the EU. One fifth of Moldovans felt satisfied with their level of information or were not interested in further issues.

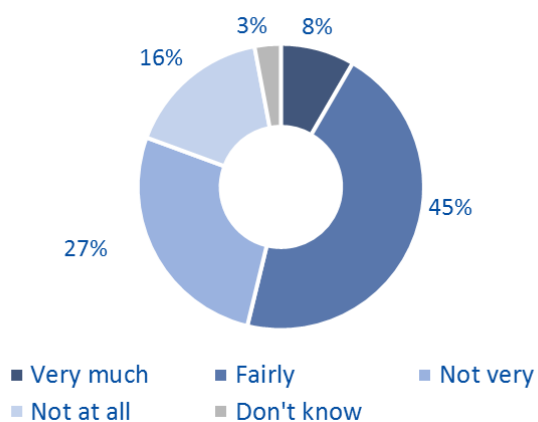
Furthermore, respondents were asked to evaluate the image of the EU on the national media. A majority of Moldova's population (69%) felt that the national media were presenting the European Union very positively (15%) or fairly positively (54%). Only 4% feel that the EU is presented in a negative way. One out of five Moldovans rated the EU's presence as neutral (20%).

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

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?



When asked about the influence on their own perception, only 8% feel that what they read or watch significantly influences their perception of the EU, while 45% admit it has a 'fair' degree of influence. Cross sectional analysis shows that residents living in larger settlements (48%) as well as those from the northern part of the country (51%) are least likely to be influenced by what they hear or read about the EU in the media.

TABLE 14 – Influence on perception about the EU

Q3.9 - In your opinion, to what extent does your country's mass media influence public opinion?					
		Influenced	Not Influenced	Don't know	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	55%	42%	3%	100%
	Between 20,000 - 150,000 inhabitants	50%	44%	7%	100%
	Equal or more than 150,000 inhabitants	52%	48%	0%	100%
GENDER	Male	54%	46%	1%	100%
	Female	54%	41%	5%	100%
AGE	15 - 34 years	57%	42%	2%	100%
	35 - 54 years	54%	43%	3%	100%
	55 years and over	50%	45%	5%	100%
EDUCATION LEVEL ⁸	Low level	51%	46%	3%	100%
	High level	57%	40%	3%	100%
EMPLOYMENT STATUS	Employed	54%	44%	2%	100%
	Unemployed /non active	53%	43%	4%	100%
GEOGRAPHIC AREA	Central	56%	42%	1%	100%
	North	43%	51%	6%	100%
	South	61%	37%	2%	100%
TOTAL		54%	43%	3%	100%

Note: Row percentages may not total 100 due to rounding

According to the survey, a large share of the population (60%) is not satisfied with the level of information provided by their government on EU-related topics. Cross-sector analysis shows that the most dissatisfied are residents of large settlements (68%).

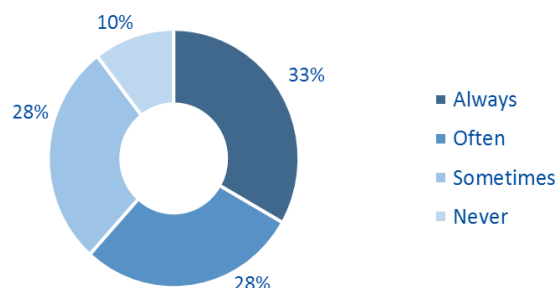
TABLE 15 – Government Inform Public about Topics Related to the EU

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	37%	57%	6%	100%
	Between 20,000 - 150,000 inhabitants	30%	63%	7%	100%
	Equal or more than 150,000 inhabitants	29%	68%	3%	100%
GENDER	Male	34%	61%	5%	100%
	Female	35%	58%	7%	100%
AGE	15 - 34 years	38%	56%	6%	100%
	35 - 54 years	31%	63%	5%	100%
	55 +	34%	60%	6%	100%
EDUCATION LEVEL ⁸	Low level	35%	57%	8%	100%
	High level	35%	62%	3%	100%
EMPLOYMENT STATUS	Employed	34%	63%	4%	100%
	Unemployed /non active	35%	58%	7%	100%
GEOGRAPHIC AREA	Central	33%	63%	4%	100%
	North	33%	58%	10%	100%
	South	40%	56%	4%	100%
TOTAL		35%	60%	6%	100%

Note: Row percentages may not total 100 due to rounding

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 very popular among Moldovans. One third of the population (33%) stated that they always follow Russian media while more than a quarter (28%) stated that they often do. Russian media are especially widespread among relatively older generations (51% among 15-34-year-olds; 67% 35-54, 71% 55+).

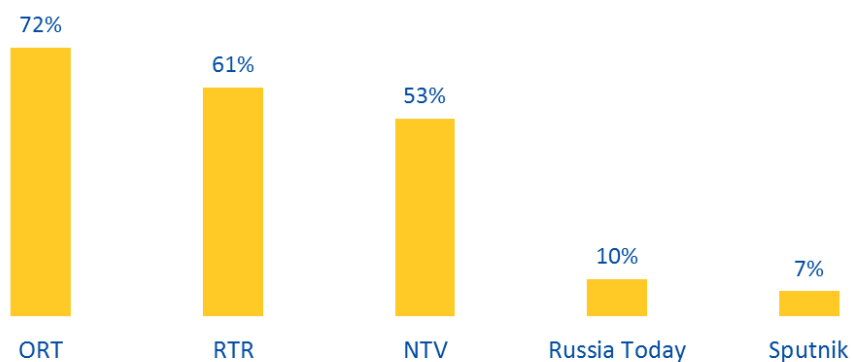
TABLE 16. Consuming Russian TV channels, Russian newspapers or Russian news portals online

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	35%	29%	26%	10%	100%
	Between 20,000 - 150,000 inhabitants	36%	30%	25%	10%	100%
	Equal or more than 150,000 inhabitants	26%	27%	37%	11%	100%
GENDER	Male	34%	26%	29%	10%	100%
	Female	32%	31%	26%	11%	100%
AGE	15 - 34 years	24%	27%	35%	14%	100%
	35 - 54 years	39%	28%	26%	7%	100%
	55 years and over	40%	31%	20%	9%	100%
EDUCATION LEVEL ⁸	Low level	35%	29%	27%	9%	100%
	High level	31%	28%	30%	12%	100%
EMPLOYMENT STATUS	Employed	30%	32%	29%	8%	100%
	Unemployed /non active	35%	26%	27%	12%	100%
GEOGRAPHIC AREA	Centre	32%	27%	32%	10%	100%
	East	31%	31%	26%	12%	100%
	West	38%	28%	23%	11%	100%
TOTAL		33%	28%	28%	10%	100%

Note: Row percentages may not total 100 due to rounding

Among those who watch Russian TV, ORT (72%) tops the list of Russian channels, followed by RTR (61%), and NTV (53%). The distribution of the most watched Russian TV channels is quite homogeneous among groups.

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



Moldovans who watch Russian TV tend to mostly follow documentaries/films (40%) and news and current affairs programmes (38%), while a less share follows entertainment (20%). The most relevant difference was found in terms of age, as the younger respondents are least likely to watch the news (25%) and more likely to enjoy

documentaries (46%) than their older counterparts. At a geographical level, Southern Moldovans cite watching the news (47%), while residents of the north of the country prefer documentaries (48%).

TABLE 17. Mostly Followed Russian TV Programmes

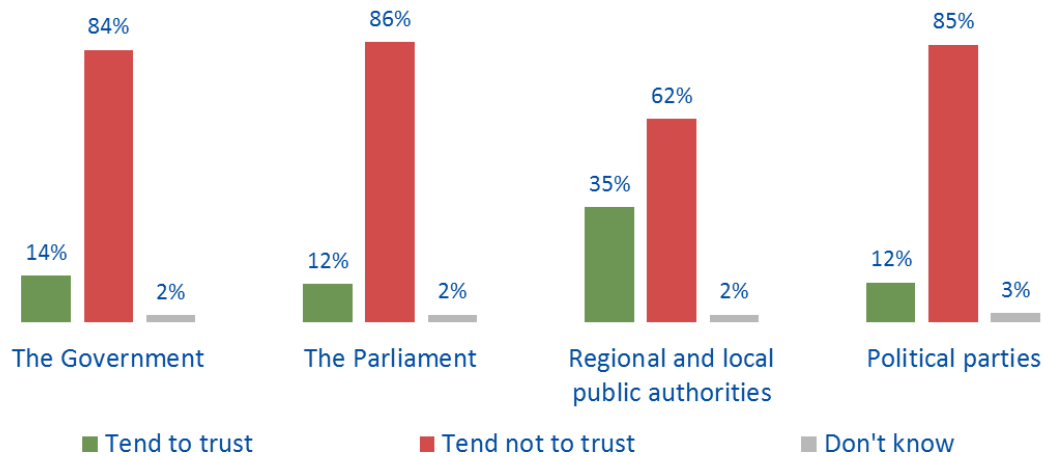
Q3.17 - If you watch Russian TV channels, do you mostly follow?						
		News and Current Affairs Programs	Entertainment	Documentaries and Films	No answer	Total
SETTLEMENT SIZE	Less than 20,000 inhabitants	36%	20%	42%	2%	100%
	Between 20,000 - 150,000 inhabitants	47%	23%	29%	1%	100%
	Equal or more than 150,000 inhabitants	41%	19%	38%	2%	100%
GENDER	Male	42%	17%	38%	3%	100%
	Female	35%	23%	42%	0%	100%
AGE	15 - 34 years	25%	26%	46%	3%	100%
	35 - 54 years	45%	18%	37%	0%	100%
	55 years and over	50%	14%	35%	1%	100%
EDUCATION LEVEL ⁸	Low level	38%	21%	41%	1%	100%
	High level	39%	20%	39%	2%	100%
EMPLOYMENT STATUS	Employed	38%	18%	43%	1%	100%
	Unemployed /non active	39%	21%	38%	2%	100%
GEOGRAPHIC AREA	Central	37%	21%	40%	2%	100%
	North	34%	17%	48%	2%	100%
	South	47%	21%	31%	1%	100%
TOTAL		39%	20%	40%	2%	100%

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

3.5. Country Evaluation and Future Expectations

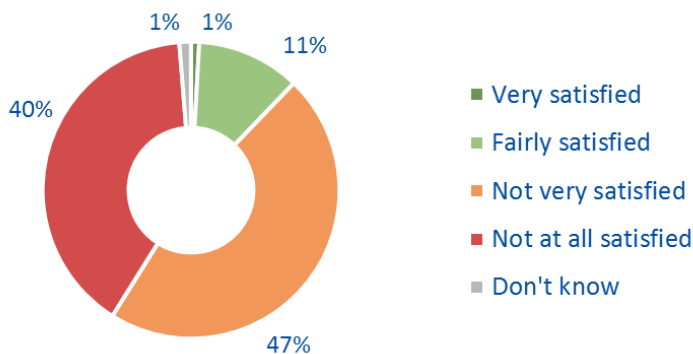
Overall, Moldovans share a fairly low trust in national, regional and local institutions: regional and local public authorities are the most trusted institution by more than a third of Moldovans (35%). Government (14%), Parliament (12%), and political parties (12%) share an equally low level of trust among the population.

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



Mistrust towards the government, parliament and political parties is very high across all segments. Nevertheless, residents of large settlements were found to be most critical in assessing the above institutions. More specifically, nine out of 10 (91%) dwellers of large cities do not trust the Moldovan government or the Moldovan parliament (93%). Regional and public authorities are the most distrusted by residents of large settlements (79%) and by people living in Central Moldova (70%).

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?



Nearly nine out of ten Moldovans (87%) are dissatisfied with the current level of democracy in their home country. Almost none are very satisfied (1%) and just one out of ten (11%) is fairly satisfied.

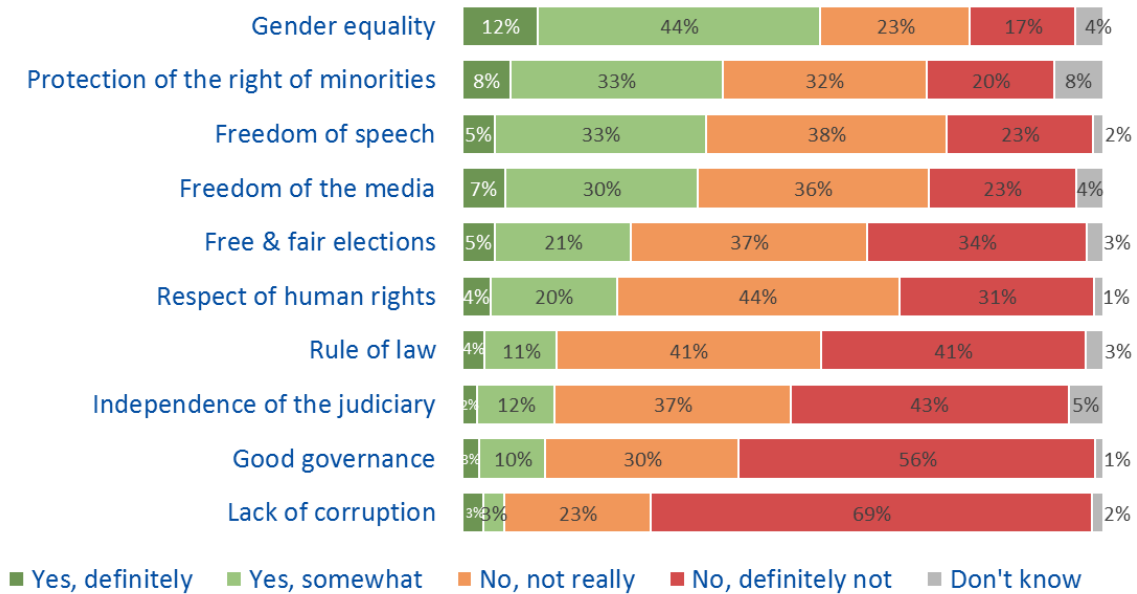
TABLE 18. Satisfaction with democracy

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
SETTLEMENTS SIZE	Less than 20,000 inhabitants	13%	85%	1%	100%
	Between 20,000 - 150,000 inhabitants	13%	86%	2%	100%
	Equal or more than 150,000 inhabitants	8%	91%	1%	100%
GENDER	Male	11%	88%	1%	100%
	Female	13%	85%	2%	100%
AGE	15 - 34 years	14%	86%	0%	100%
	35 - 54 years	11%	88%	1%	100%
	55 years and over	12%	86%	2%	100%
EDUCATION LEVEL ⁸	Low level	15%	84%	2%	100%
	High level	9%	90%	1%	100%
EMPLOYMENT STATUS	Employed	11%	88%	1%	100%
	Unemployed /non active	13%	86%	1%	100%
GEOGRAPHIC AREA	Central	10%	89%	1%	100%
	North	12%	87%	1%	100%
	South	16%	82%	2%	100%
TOTAL		12%	87%	1%	100%

Note: Row percentages may not total 100 due to rounding

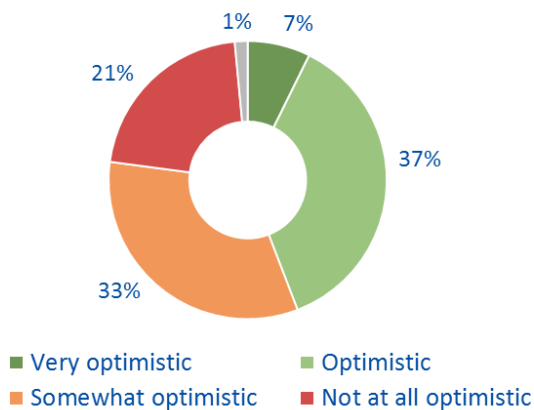
The most widely acknowledged elements of democracy that apply to Moldova are gender equality (56%), protection of the right of minorities (41%), freedom of speech (38%) and freedom of the media (37%). On the other hand, Moldovans feel that more work is needed to bring their democracy towards lack of corruption (92% low evaluation), good governance (86%), rule of law (82%) and independence of the judiciary (80%).

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

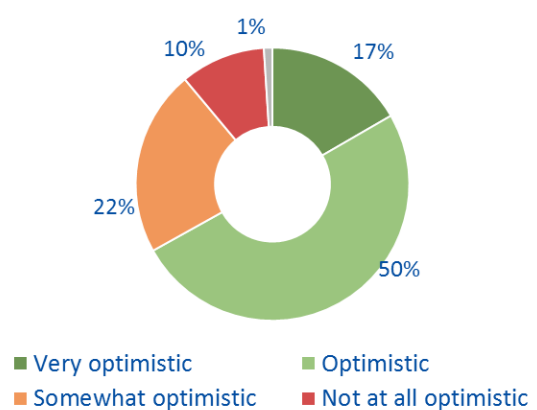


Overall, Moldovans are not particularly optimistic about the future of their country and roughly 44% of them feel confident in their country’s future as compared to a 54% share of pessimists. When asked about their personal future, however, Moldovans feel slightly more confident, and positive beliefs (67%) strongly outweigh negative expectations (32%).

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 among geographical areas. Optimism is greatest in southern areas of the country (53%), whereas inhabitants of the northern and central parts are more pessimistic (41% each). Likewise, smaller settlements (49%) are more optimistic about their country’s future than their larger counterparts (medium 37%, large 30%). Additionally, young people show more optimism (50%) about their country, compared to older generations (42% 15-34; 39% 55+).

People are more likely to be optimistic than pessimistic about their personal expectations for the future: 67% versus 32%. There is a clear generational split on the question: those aged 15 to 34 are more optimistic than those 55 years old and over (81% versus 48%).

Finally, respondents were asked about the most pressing problems facing Moldova: almost half of Moldovans spontaneously mentioned corruption (49%), followed by lack of employment opportunities (32%), economy (27%), an increase in prices and taxes (26%) and low salaries (13%).

TABLE 19. Optimism Regarding Moldova’s 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	49%	49%	2%	100%
	Between 20,000 - 150,000 inhabitants	37%	63%	1%	100%
	Equal or more than 150,000 inhabitants	30%	69%	1%	100%
GENDER	Male	48%	51%	2%	100%
	Female	41%	58%	1%	100%
AGE	15 - 34 years	50%	48%	2%	100%
	35 - 54 years	42%	58%	1%	100%
	55 years and over	39%	59%	2%	100%
EDUCATION LEVEL ⁸	Low level	44%	55%	2%	100%
	High level	45%	54%	2%	100%
EMPLOYMENT STATUS	Employed	49%	50%	1%	100%
	Unemployed /non active	41%	57%	2%	100%
GEOGRAPHIC AREA	Central	41%	59%	1%	100%
	North	41%	56%	3%	100%
	South	53%	47%	1%	100%
TOTAL		44%	54%	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	67%	32%	1%	100%
	Between 20,000 - 150,000 inhabitants	62%	36%	1%	100%
	Equal or more than 150,000 inhabitants	68%	32%	1%	100%
GENDER	Male	71%	28%	1%	100%
	Female	62%	36%	2%	100%
AGE	15 - 34 years	81%	18%	2%	100%
	35 - 54 years	65%	35%	1%	100%
	55 years and over	48%	51%	1%	100%
EDUCATION LEVEL ⁸	Low level	64%	35%	1%	100%
	High level	69%	30%	1%	100%
EMPLOYMENT STATUS	Employed	72%	28%	1%	100%
	Unemployed /non active	63%	35%	1%	100%
GEOGRAPHIC AREA	Central	70%	29%	1%	100%
	North	55%	44%	1%	100%
	South	74%	26%	1%	100%
TOTAL		67%	32%	1%	100%

Note: Row percentages may not total 100 due to rounding

Annex 1

Table 20: 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	Central
	North
	South

Table 21: 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 22: Distribution of target population by geographic area and settlements size. Year 2015

Geographic Area	Settlements size	Population
Centre	Less than 20,000 inhabitants	625,474
	Between 20,000 - 150,000 inhabitants	95,446
	Equal or more than 150,000 inhabitants	573,858
North	Less than 20,000 inhabitants	692,248
	Between 20,000 - 150,000 inhabitants	171,523
	Equal or more than 150,000 inhabitants	0
South	Less than 20,000 inhabitants	755,530
	Between 20,000 - 150,000 inhabitants	73,209
	Equal or more than 150,000 inhabitants	0
Total	Less than 20,000 inhabitants	2,073,252
	Between 20,000 - 150,000 inhabitants	340,178
	Equal or more than 150,000 inhabitants	573,858
Total Population		2,987,288

Source: National Bureau of Statistics of the Republic of Moldova

Table 23: Distribution of target population by geographic area, age and gender. Year 2015

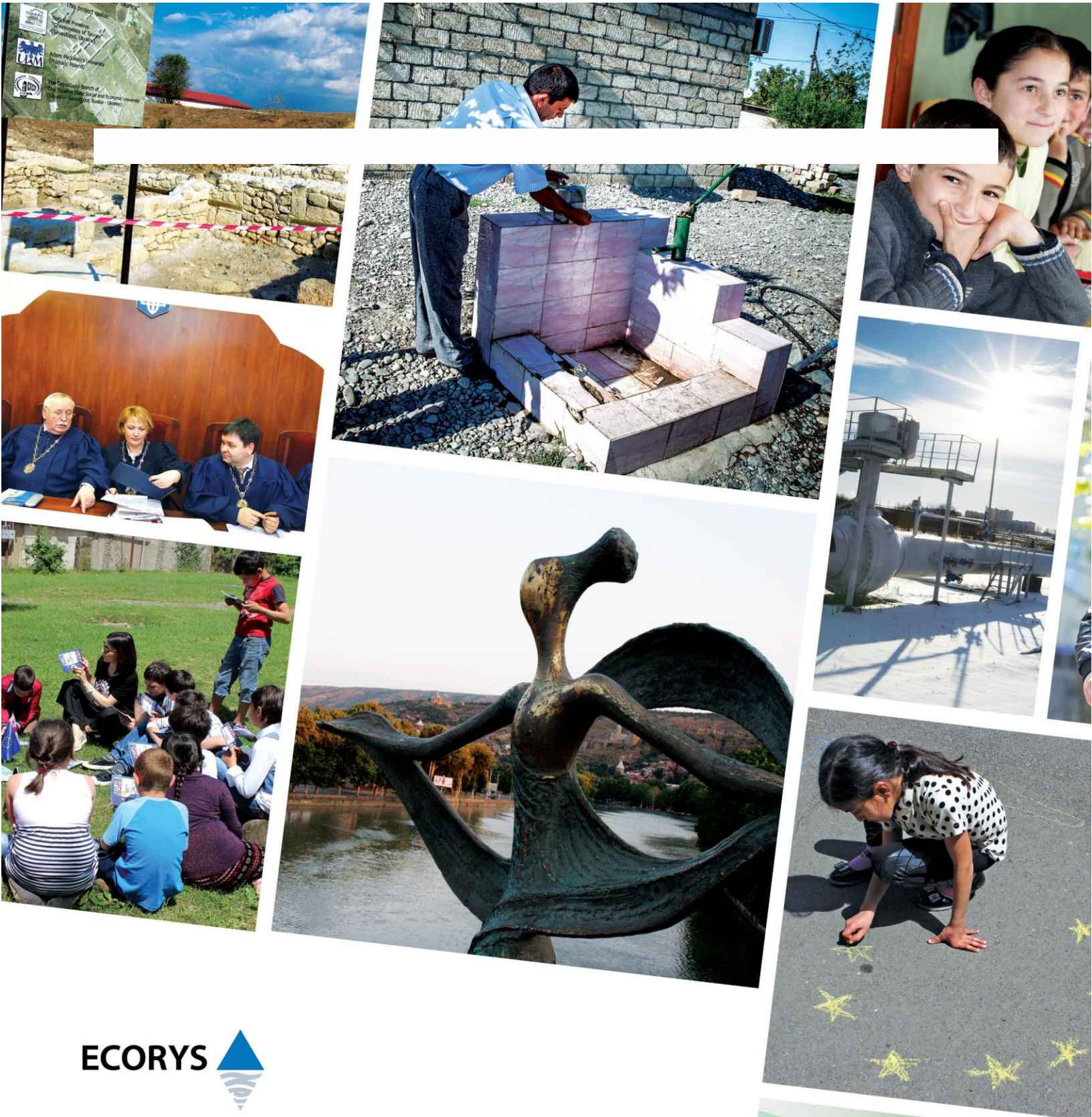
Geographic Area	Age	Gender	Population
East	15 - 34 years	Male	265,443
		Female	264,496
	35 - 54 years	Male	205,594
		Female	225,937
	55 years and over	Male	137,549
		Female	195,759
North-Centre	15 - 34 years	Male	159,628
		Female	150,573
	35 - 54 years	Male	137,492
		Female	146,061
	55 years and over	Male	110,229
		Female	159,788
West	15 - 34 years	Male	177,514
		Female	164,876
	35 - 54 years	Male	129,735
		Female	134,043
	55 years and over	Male	94,488
		Female	128,083
Total	15 - 34 years	Male	602,585
		Female	579,945
	35 - 54 years	Male	472,821
		Female	506,041
	55 years and over	Male	342,266
		Female	483,630
Total Population			2,987,288

Source: National Bureau of Statistics of the Republic of Moldova

Table 24: Distribution of target population by geographic area and employment status. Year 2015

Geographic Area	Employment status	Population
East	Employed	509,500
	Unemployed/Inactive	785,278
North-Centre	Employed	341,116
	Unemployed/Inactive	522,655
West	Employed	333,251
	Unemployed/Inactive	495,488
Total	Employed	1,183,867
	Unemployed/Inactive	1,803,421
Total Population		2,987,288

Source: National Bureau of Statistics of the Republic of Moldova



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